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The antecedents of Italian Sounding: An empirical study on the perception of Italian food by foreign consumers.

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ABSTRACT

This is the tale of Made in Italy agri-food on foreign markets: victim of unfair competition, plundered by about 80 billion euros per year, pushed back in its aspiration to export, and unprotected by uniform legislation. Known as Italian Sounding, this practice lies in exploiting commercial features related to Italy to market non-Italian products and allude to a highly esteemed provenance globally.

In such a fast-pacing and competitive world, the need of addressed solutions to improve the recognition of Made in Italy abroad, strengthen export strategies, and discover new market prospects is becoming a compelling one. To do so, consumers' opinion cannot be disregarded, particularly international ones.

As a matter of fact, the study of the country-of-origin phenomenon and of its effect on buyers' behaviour is one of the most relevant and extensively researched in contemporary marketing and a vital business component for companies in the Italian agrifood industry.

The following study aims at finding the antecedents of country-of-origin effects and consumers' perceptions in the food industry, focusing on Italy and Made in Italy exports. This factor has not already been highlighted by the present literature, giving the possibility to undertake further research. Besides, the study will also investigate the social-psychological component related to these product-country associations to assess the extent to which perceptions influence customers in buying Italian food items.

A sample of 107 participants has been selected to analyze purchase intentions for the above-mentioned characteristics, and the drivers behind purchase intentions in the food industry were identified.

Key Words: Purchase Intention; Italian Sounding; Country of Origin; Perceptions; Italy; Food Industry.

Paper Type: Research Paper

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INTRODUCTION

Victim of unfair competition, looted by around 80 billion euros per year, held back in its rush to export, in the absence of uniform legislation to protect it: this is the story of Made in Italy agri-food on international markets, at least according to what the press reports (Ambrosetti & Assocamerestero, 2022). According to Coldiretti, the value of false Italian agro-food may even be worth 120 billion euros per year, moreover, over two out of three Italian agri-food products sold internationally are imitations with no production or manufacturing link with Italy (Coldiretti, 2022).

It is known as Italian Sounding (IS) and it is a practice that takes the form of using commercial elements recalling Italy on non-Italian products to allude to a highly renowned provenance around the world. Because they merely allude to the country of good food an "Dolce vita", non-Italian producers are accused by genuine Italian ones of wanting to deceive naïve consumers, by exploiting a reputation that clearly does not belong to them as free riders. Plus, they are accused of stealing a market share that could potentially be served by Made in Italy exports (Gregori, 2016).

The Italian Sounding phenomenon takes advantage of a well-known concept in international marketing, namely the country-of-origin effect and it exploits the positive image of Italy and the reputation of the Italian agri-food industry. Many consider this practice as anti-competitive to all intents and purposes, both towards consumers and Italian producers. Moreover, some Italian businesses emerge, often worshiped as ambassadors of true Made in Italy abroad, which have conquered foreign markets by not producing "Made in Italy" as required by its official meaning of indication of origin (Reg 450/2008, CDC). On the contrary, they produce locally, adapting and betraying the Italian culinary tradition to the target market tastes.

The objective of this research is to shed light on the ramification and scope of the Italian Sounding phenomenon and its impact on the positioning of Made in Italy abroad. This work aims at investigating a portrait that appears to be much more complex that the black and white crime scene photographed by the news.

Before starting the research, next chapter will examine existing studies on this rather broad topic and highlight the most important findings, which will serve as the current research's foundation. Therefore, the first chapter will present in detail the Italian agri-food sector, with a particular emphasis on the Made in Italy brand, recent consumer and demand trends. The following chapter will examine, instead, the roots of the IS phenomenon, namely the COO effect, by carrying out a thorough analysis of the literature review, in order to find a gap in available literature. This study will bring to light any missing study on the antecedents and the acceptance of this phenomenon. Various industries, contexts, and countries will be taken into account to allow for generalized results applicable to the food industry, and for the identification of different categories of imitation and drivers of acceptance. As a result, the examination will be dedicated to bridging a gap in the prior body of knowledge and adding to current findings. Therefore, the identified gap will bring to design three research hypothesis that will be covered in the third chapter.

The third chapter will attempt to fill the gap left by available literature by presenting a survey conducted on 107 respondents from 30 nationalities. Afterwards, data collected will be examined through different analysis using both Excel and SPSS to confirm their reliability. The results tested will demonstrate the validity of the research question mentioned before and will be instrumental in satisfying the hypotheses identified.

Finally, management implications will be presented as well as the study's limitations and directions for future research. Conclusions about the whole study will be made.

CHAPTER ONE

The taste of being Italian

1.1 Introduction

Made in Italy is recognized throughout the world as a synonym of exclusivity, prestige, and quality. When it comes to the agri-food sector, it is further associated with quality foods from the Mediterranean diet, national specialities, produce typical of the territory. Geography, climate, tradition, culture, innovation, taste, these all come together to create unique products of a unique brand. The Italian agri-food chain represents one of the pillars of the competitiveness of Made in Italy in the world.

The term “Made in Italy” was first introduced in the 60s and has far from noble origins. Some European countries (most notably England, France, and Germany) used to label important products with their place of origin, to warn buyers about which ones to avoid and defend domestic production. Since the 1980s, however, Italian products, both from artisan and industrial production, have undergone a revaluation. Their reputation slowly improved and spread abroad, becoming the commercial advantage of quality, innovative, and tasteful products referred to as "Made in Italy".

Today, MI is recognized as a real brand and, as a reputable one, it ranks third in surveys for brand awareness, behind Coca-Cola and Visa (Noci, 2015); (Cappelli, et al., 2017). This result is attributable to the artistic and artisanal history of the country, where the aesthetic culture together with the artisan skills and the quality of raw materials led to the creation of a product of excellence; the craftsman, even before money, sought to achieve personal satisfaction in a product made as a work of art. Therefore, the elements implicitly recalled by the Made in Italy concept is the high quality and "know-how", that is, the transformation of products through a technological process with respect to which Italy shows a specialization and a level of skill linked to the country’s own tradition and labour specialization (De Filippis, 2012); (Carbone & Henke, 2012).

Precisely these factors gave rise to and are driving the diffusion of Italian Sounding (IS) as an anticompetitive practice – the misappropriation of the Made in Italy (MI) identity. This favours foreign companies at the expenses of Italian ones and causes an imbalance in the market due to information asymmetry, which translates into an adverse choice on the part of consumers. By dressing F&B with Italian clothes, in the absence of correct information, and marketed as affordable goods, buyers are induced into purchasing fake products.

Not only it deceives consumers, most importantly, this causes significant damage to Italian businesses and manufacturers. Particularly so as it develops on an industrial fabric made up for 92% of small and medium-sized enterprises (SMEs), having limited resources and competences to reach foreign markets, and already constrained by competition from giant international multinationals[1].

1.2 Overview of the Italian Agri-Food Sector

With over 570 billion euros in turnover in Italy, the agri-food chain, from fields to shelves to catering and hospitality, represents one of the key sectors of the country's economy. According to ISTAT data from 2021, the agri-food chain can be considered the leading economic sector and Italy's main source of wealth, with its turnover representing almost the 25% of total GDP, with an increase of 7 percent compared to the previous year, despite the difficulties related to the pandemic, and a total of more than 4 million employees, about 17% of the total workforce. Agri-food sector is the first in Italy for added value generated among the main sectors of Made in Italy, and the Italian one is also the second European economy (after Spain) for the incidence of agricultural and agrifood added value on GDP (3.9%).

In its entirety, the sector extends from agriculture and livestock to the food and beverage industries, involving the entire brokerage sector and other services related to the secondary sector of the economy such as distribution and commerce. The last link in the supply chain, but not the least important, is represented by the restaurant (hospitality) sector, which accounts for about 8% of the turnover of the extended supply chain, and, more generally, of the hospitality and catering services necessary to make get the products to the final consumer.
To have a complete picture of the importance of this sector, it is also necessary to account for direct and indirect relationships existing between the various supply chain' players, and the numerous cooperatives (around 10.000 as of 2021) that characterize the Italian national fabric[2].
The Covid-19 pandemic has further highlighted the value and resilience of this industry. Data demonstrate how the supply chain has been able to prove itself immune, or almost, to the economic, health and social crisis experienced by the world in recent months, with restaurant being the leading sector.

Italian excellence is represented by the *typical* products recognized as being of high quality. Italy holds the largest number of agri-food products with denomination of origin and geographical indication

[1] According to the EU, SMEs are companies employing between 10 and 249 people and having a turnover between 2 and 50 million euro.
[2] According to data from the Business Register of the Chambers of Commerce – Registro delle Imprese delle Camere di Commercio – In Italy there are over 10,000 cooperative enterprises active in the agri-food system.

recognized by the European Union (DOP, IGP, STG[3]). With 314 products registered as of 2022, Italy accounts for over a fifth of the products recognized in Europe. DOP and IGP certified quality productions are confirmed as among the most dynamic with a value of 17 billion (+4%), 19% of the total Italian agri-food sector. Such *protected designation* act as quality marks and contribute to maintain high the reputation of Italian agri-food. Such products are referred to as the symbol of Made in Italy.

Although it is intuitively clear what Made in Italy refers to, it is challenging to provide a rigorous and unambiguous description. The undoubtedly common facets to all definitions are the qualitative idea behind the product directly related to its origin, referring to the location of production and transformation of raw materials, as well as its "exportability". In this respect, Made in Italy is a key component of Italian manufacturing and exports in terms of both labour specialisation and technology, particularly as it sits in an overall seasoned and traditional export basket (Di Maio & Tamagni, 2008).

Goods of the Mediterranean diet, which are directly related to some of the traditional food products of the nation, are particularly representative of Made in Italy agri-food, in that they have a wide recognition abroad for being products of the Italian agri-food system (ISMEA, 2012); (Antimiani & Henkel, 2007). However, Italy is a mine of diversified agri-food products of inestimable value. The wide variety of typical Italian products is to be found in the landscape and geography of the Bel Paese. Italy is a massive peninsula that stretches from the Alps to the Mediterranean; it has almost 7,000 kilometres of coastline, two major islands, and a great number of smaller islands. The country is 42% hilly, 35% mountainous, and 23% flat. Consequently, climate varies greatly across locations – few kilometres separate the cold and temperate climate, typical of the northernmost regions, and the warmer temperatures, located throughout the Tyrrhenian coast and part of the Adriatic coast. The great breadth of agrifood items is largely due to this climate diversity.

For what concerns the elements that qualify the typicality, and therefore the uniqueness and distinctiveness of MI agro-food products, it must be emphasized that these characteristics result from the connection between the product and its territory of origin. They are the outcome of the presence of long-consolidated knowledge and the availability of both human and material resources that enable the production of non-mass goods in specific regions and territorial realities. In this approach, the concept of "territory of origin" is used in its broadest sense, i.e., not only strictly referring to the physical characteristics of the environment (climate, soil and pedological, landscape, etc.), but also to the know-how accumulated over time about production techniques (Carbone & Henke, 2012), as well as historical, cultural and institutional traditions. In other words, "typical" means everything that a given territory, in

[3] DOP (PDO) – Protected Designation of Origin; IGP (PGI) – Protected Geographic Indication; STG (TSG) – Traditional Guaranteed Specialty

the above terms, conveys to the product, making it "unique" and not replicable with the exact same traits in other places. Consequently, Made in Italy agri-food could be defined as the direct connection the Italian origin and nature of a product, as a quality differentiator. Hence, it is acceptable to state that Made in Italy is made up of "*all those products capable of recalling the concept of Italianità"* (i.e., Italianness – being Italian and/or belonging to Italy's traditions).

The success of the sector is largely attributable to Italian agriculture' supremacy in a variety of areas and for a range of productions. As previously mentioned, a significant part of those typical products is protected by quality certifications regulated by the European Union. These are intended both to promote and protect the names of premium agricultural and food products, guarding them from abuse or imitation, and to provide consumers with information on the specific characteristics of the products themselves, such as their area of origin and production methods, thus making them unique and inimitable. According to the latest update made by the Ministry of Agricultural, Agri-food and Forestry Policies in April 2022, the Italian agri-food productions protected by these brands are 316, of which 173 DOP and 139 IGP. The report also identifies fifteen categories of premium products that predominate in this context – the prevailing ones are fruit, vegetables, and cereals with 40% out of the total certifications, followed by cheeses (18%), extra virgin olive oil (16%), meat preparations (15%). Grana Padano, Parmiggiano Reggiano, prosciutti Parma and San Daniele, Mozzarella di Bufala from Campania, Balsamic oil from Modena, and Gorgonzola and Mortadella from Bologna, are the most relevant designation of origin in terms of production volumes and turnover. To add to these, Coldiretti selected 5.333 traditional food products, typical culinary recipes, and local specialities, and awarded as many Flags of Taste[4] to the Boot (Coldiretti, 2021). The Flags serve as evidence of Made in Italy around the globe and are especially aimed at helping foreigners and travelers orientating in the eno-grastronomical Italy, nonetheless they are also the result of the efforts of entire generations of farmers dedicated to preserving the region's biodiversity and long-standing culinary customs. Lastly, 77 DOCG, 331 DOC, and 118 IGT[5] certifications are assigned to Italy's vast enological heritage, placing the country in first spot in the world for production and export of wine (MIPAAF, 2022). Italy is also the first country for biodiversity[6] and for global food safety, having the lowest percentage of produces and crops containing unapproved chemical residues.

The food records Italy has achieved show how vital the agriculture sector is to the long-term development of this nation and have been obtained thanks to a supply network of excellence which is spread

[4] Each Flag of Taste is a real culinary guide to the typical and genuine cuisine, region by region. To be awarded one, it's not enough for a food to be *original* or *good*, it has to be produced following traditional rules.
[5] DOCG – Controlled and Guaranteed Designation of Origin; DOC – Controlled Designation of Origin; IGT – Typical Geographical Indication
[6] Italy holds 504 varieties of grapes on its vine stock record, compared to its French neighbours' 278 variations, and 533 varieties of olives, as opposed to Spain's 70 varieties (MIPAAF).

throughout the entire peninsula territory. Because of the sector's economic and cultural relevance, it is safe to conclude that the beating heart of Italy is at the table.

1.3 Significance of Made in Italy abroad: agri-food exports

In the last twenty years, the Italian agri-food chain has proved to be extremely virtuous and profitable. According to a report by CDP, taking into consideration only the central rings of the chain, i.e., agriculture and the processing industry, in 2019 Italy generated around 70 billion euros in real added value, equal to over 4% of the national total. These data make Italy one of the main agricultural powers of the European Union, with numbers in line with those of Germany, France and Spain (CDP, 2021).

In the international imagination, the wording *Made in Italy* represents much more than a mere indication of origin. Various scholars throughout the years have been supporting this, and just as many surveys show it: these three words add value to any product labeled as such, to which the foreign consumer associates, almost automatically, some key characteristics such as: excellence of raw materials and processing, know-how, good taste, "dolce vita", just to name a few. The perception that emerges from several surveys aimed at examining the distinctive qualities of successful Italian productions abroad, recognises that Made in Italy products not only have a high intrinsic value, in that they are instrumental "ingredients" for achieving a better quality of life, in addition, they have a high symbolic value because of their ability to evoke the Italian lifestyle, the so-called "*Dolce Vita Italiana*" (Assocamerestero, 2006); (Anselmi, 2011). The knowledge of Italian food and wine excellence beyond the country's borders is the result of several factors; the abundance of typical products regarded as being of the highest quality is surely one. Not less important, however, has been the diffusion of the image of the "Mediterranean Diet", largely based on cereals (pasta, rice, polenta), legumes, fruit, vegetables, fish and olive oil – perhaps all accompanied by a glass of red wine – all products that the territory offers in great measure. In 2010 it was recognized by UNESCO as a legacy and symbol of healthiness, allowing people to discover Italian excellence.

Exports of Made in Italy products play a fundamental role – in recent years, these have led to an expansion of production, turnover and attention in terms of marketing and brand development. About a fifth of the production is destined for foreign markets, although it is evident that the made in Italy food industry is still not very intercontinental. In fact, according to ISTAT data from 2021, almost 90% of agricultural products and about 70% of exported food products are destined to European markets.

The historical record of exports reached by the agri-food sector in 2021, equal to 50,1 billion euros, is evidence of the competitive relevance and appreciation of Italian agri-food production at a global level of which 42,3 billion euros deriving from the Food & Beverage sector and 7.8 billion euros from the agricultural sector. Never before has so much Italian food and wine been consumed abroad.

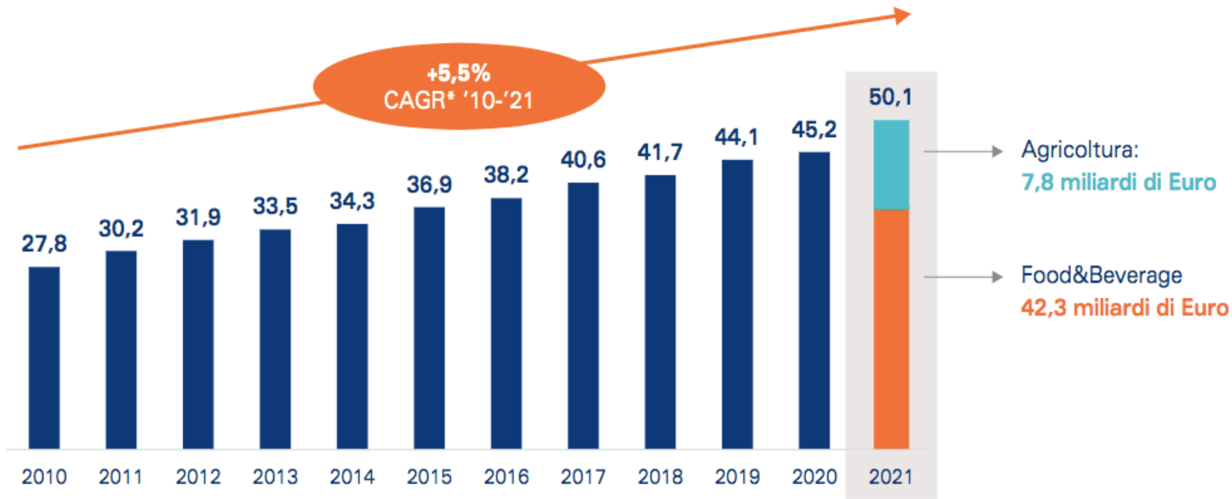

Figure 1: Italy's agri-food export growth in billions of euros, 2010-2021.
Source: Elaborated by The European House – Ambrosetti on ISTAT data

This performance was attained through constant growth over the last decade (CAGR[7], equal to +5.5% in the period 2010-2021) and thanks to a record growth achieved in 2021 with a +10.8% performance, the highest of the decade.

The growth of Italian positioning on international markets has also resulted in a positive trade balance, which reports a positive balance for the third consecutive year and for the first three years of history, which in 2021 amounts to +3.3 billion euros. Italy holds a significant market share at an international level for some products common to the Mediterranean diet. Besides wine, which continues to be the most exported item and accounts for the 14.3% of total agri-food exports, flour processing products accounts for 10.3% of the total, followed by dairy products (9.1%) and processed fruit and vegetables (8.4%) (Istat-Coeweb, 2022).

[7] CAGR- Compound annual growth rate

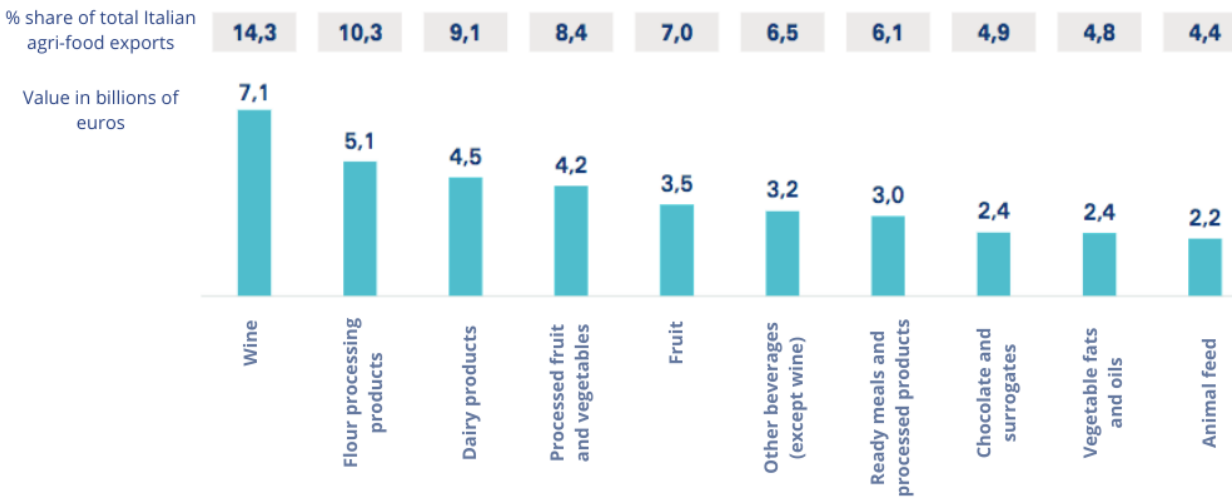

Figure 2: Top 10 exported product categories of the Italian agri-food chain and share of total exports, 2021. Source: ISTAT-Coeweb on ISTAT data, 2022

Furthermore, 84.4% of total exports is driven by the food processing industry which, hence, determines the real competitiveness of the Italian agri-food chain. As a matter of fact, the country is the 1st exporter in the world of peeled tomatoes (78.4% of international trade), 1st producer and 1st exporter of pasta (47.0% of the world market), 1st exporter of tomato sauce (26. 0% of the market), 2nd exporter of chestnuts, kiwis and apples, as well as the aforementioned wine (FAOSTAT, 2022).

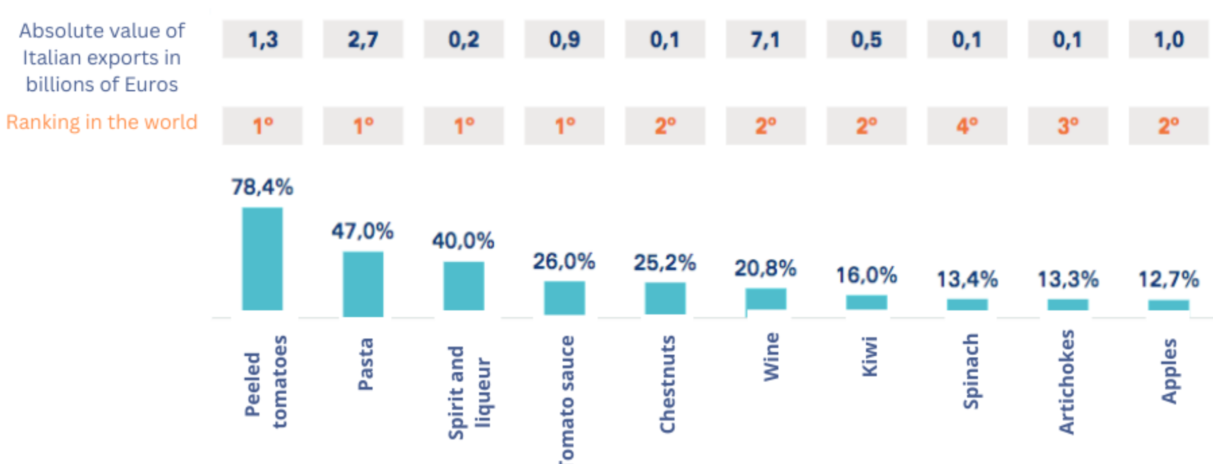

Figure 3: World market share of exports of the top 10 product categories, 2021. Source: elaborated by Ambrosetti on FAOSTAT data 2022

The destinations of agri-food trade in our country have always been very concentrated and strongly influenced by Italy's membership of the European Union, due to the seasonality and perishability of agricultural and food products, which often condition the calendars and mode of transport, especially over long distances. However, it should be noted that the variety of Italian export markets continues to be fairly broad, with significant partners across several continents. In every instance, due to the type of products mainly exported, these are mainly highly developed countries, while emerging nations are hardly present. As expected, hence, the biggest slice of Italian food exports, namely almost three quarters of the total, are destined to Europe, while the Americas account for 17.1 percent, followed by Asia, Africa, and Oceania and other areas. Among the major trading partners, Germany is the main outlet market with around 15 percent, ahead of the United States and France, accounting for 13.1 and 11.1 percent, respectively (Ministero dello Sviluppo Economico, 2022). Despite Brexit and a hard drop during the Covid-19 pandemic, a remarkable result has been achieved in the UK and in China, although in the latter our market share continues to remain marginal.

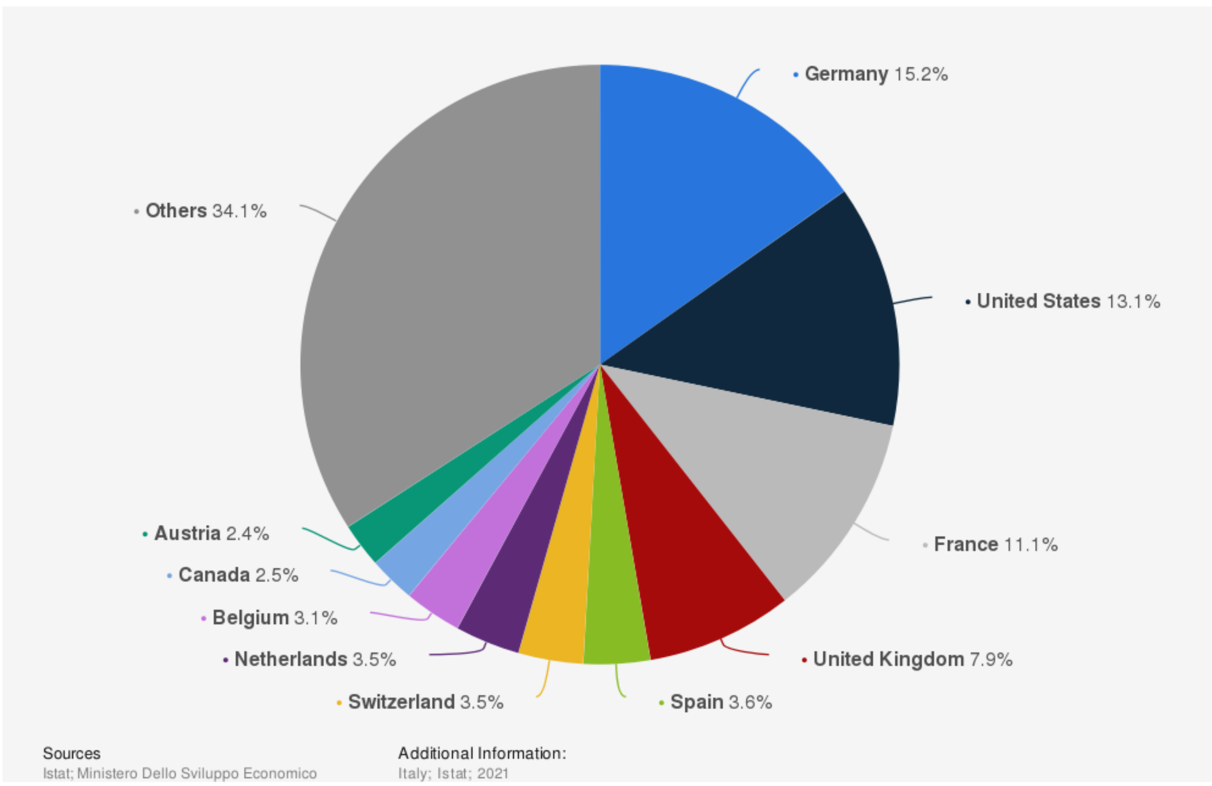

Figure 4: Leading destination countries of food exported from Italy 2021, by value share.
Source: Statista; elaborated by MSE on ISTAT data

Besides Europe, the trend of "*eating Italian*" has spread in North America, too. This is because the United States and Canada were the main destination of emigration in the 19th and 20th centuries, which saw millions of Italians move overseas, bringing along the traditions acquired at home, obviously including the culinary one. This allowed them to spread and appreciate the goods and cuisine, which flourished in a community lacking a strong culinary culture. According to a survey, 50% of Americans think of cuisine and wines when asked what Italy evokes (Piepoli, 2006). This may explain why the Made in Italy brand is valued overseas, that is, both for the large range of products offered and for the way they are transformed through typical recipes, finally making them unique. As a matter of fact, the United Stated and Canada recorded a sharp increase in values of more than 20 percent, compared to pre-pandemic levels of 2019[8].

Finally, attesting to the strength and success of Italian agrifood exports, half of the top exporting partner countries experienced double-digit growth in Made in Italy food imports.

1.4 Competition and Constraints to Internationalization

The Italian agri-food industry has maintained a ten-year growth path, displaying resilience to the important drivers of change just mentioned – post-pandemic slowdown in global trade and the post-Brexit uncertainties, to which must be added the effects of the 2019-2021 tariff imposition on the US market[9] and the increasingly frequent climatic anomalies, that in the last few months have caused production reductions in several sectors. Still, the industry presents some significant structural flaws that prevent it from reaching its full potential.

First of all, Italy ranks 5th in the EU-27 + UK for the value of agri-food exports, despite the record reached in 2021. The Netherlands leads the European ranking, with a value of agri-food exports of 104.2 billion euros, followed by Germany (77.1 billion euros), France and Spain, with respectively 69.7 and 61.2 billion euros). The relevance of the Italian supply chain does not change if we look at the incidence of agri-food exports on the total national export: Italy is positioned in 6th place in the cluster of the top 10 European exporters, with a share of 9.7%, about half of the Spanish one. Partly, this is due to the historical dependance of the agricultural sector on some necessary raw materials.
Furthermore, among the structural weaknesses of the country agri-food sector is its excessive fragmentation, that inevitably limit its international outlook. Considering the structure of the Italian productive fabric, even though on one hand the companies' family dimension is synonymous with authenticity, tradition, reliability, and of a virtuous link with one's territory and quality, on the other, this same facet of micro or small business implies a significant limitation. Ambrosetti points out that only 13.2% of the revenues in the Food&Beverage industry are generated by small businesses[10], which make

[8] For what concerns Canada, the international free trade agreement (CETA) signed in 2017 with Italy was instrumental to allow the latter to be successful overseas. Canada's commitment to protect over 170 certified products led to exceeding 1 billion euros in Made in Italy food exports in 2021, equivalent to an increase by 26%
[9] Coldiretti, 2021
[10] Companies with a turnover of less than 10 million Euros.

up 92.8% of the sector's active companies; whilst large businesses[11] make up for 1.8% but alone account for 61.9% of revenues. Even when compared to European peers, this fragmentation is notably significant: small businesses only represent 56.6% of the German F&B industries, 80.3% of the Spanish, and 80.5% of the French (Ambrosetti & Assocamerestero, Italian Sounding: quanto vale e quali opportunità per le aziende agroalimentari italiane, 2022).

A straightforward example is Pasta. Despite the fact that there are currently 586 manufacturers, the top ones are responsible for up to 83% of it, with Barilla particularly standing out in terms of volumes and accounting for roughly half of the total turnover, equal to five billion euros[12] (LargoConsumo, 2020).

DENOMINAZIONE	FATTURATO 2018	DIPENDENTI
BARILLA G. E R. FRATELLI SPA	2.508.928.966,00 €	4140
F.LLI DE CECCO DI FILIPPO FARA SAN MARTINO SPA	437.334.210,00 €	560
PASTIFICIO RANA SPA	424.413.786,00 €	1061
F. DIVELLA SPA	266.359.268,00 €	312
PASTA ZARA SPA	195.377.768,00 €	312
PASTIFICIO LUCIO GAROFALO SPA	152.823.883,00 €	190
DE MATTEIS AGROALIMENTARE SPA	111.941.490,00 €	182
LA MOLISANA SPA	108.231.977,00 €	163
RUMMO SPA	84.437.274,00 €	136

Figure 5: Pasta processing industry - major companies and turnover, 2018.
Source: Elaborated by LargoConsumo on Cribis data.

From a marketing and managerial perspective, this data is pertinent since more than half this production is made purposely to be exported. Italian pasta is a distinctive national symbol – its notoriety coincides with the perception of Made in Italy, and manufacturers involved demonstrate excellent, almost uniform quality and production standards. However, this also proves that the large number of small, less structured enterprises, very often family-run, is not able to raise enough capital to compete on the world market, especially on the basis of price reductions, which is now more crucial than ever. Last but not least, the

[11] Companies with a turnover greater than 50 million Euros.
[12] Even though figures provided refer to the end of 2018, the post-pandemic scenario is almost invariant, both in terms of production and companies' turnover

absence of large Italian distribution chains abroad could potentially facilitate the entry of agri-food into target markets, such as Auchan and Carrefour do for France.

This is important evidence for the international competitiveness of the national supply chain, considered in light of the fact that the largest corporations are those most able to make long-term investments, have the highest margins, and contribute the most to the resilience of the reference sector.

The Italian economy depends heavily on the agri-food industry, which is also a global representation and a symbol of "Made in Italy." While domestic demand has been flat in recent years, exports have continued to increase. However, Italy's fragmented food supply chain poses a barrier to globalization, as only the biggest businesses have the infrastructure to bear the high expenses of exporting.

The last major criticality that must be addressed to outline all the main brake factors for the international growth of Made in Italy agri-food is the Italian Sounding phenomenon. This phenomenon severely weakens the foreign positioning of Italian products and will serve as the main focus of the present study.

Italian sounding, together with the phenomenon of Counterfeiting, fall under the same broader category of agro-piracy. Counterfeiting refers to a specific sort of fraud involving offences related to the violation of trademarks, designs, indications of origin, and patents with the intention of imitating the appearance of the original items. IS, instead, represents a more subtle phenomenon and consists in marketing products as if they were made in Italy to deceive consumers into thinking they are purchasing "Italian" and profit from the positive image MI enjoys. IS produces enormous negative repercussions to the diffusion of MI in the world. To understand its magnitude, it is enough to compare the global turnover of MI – all-time high hit in 2021 of around 51 billion euros – and of IS – the turnover of false Italian food has reached 120 billion of euros in 2022 (ANSA, 2022). As of 2026, the turnover is expected to reach 160 billion. Over two-thirds of "Italian" food products in the world are imitations (Figure 6) (Statista, 2022).

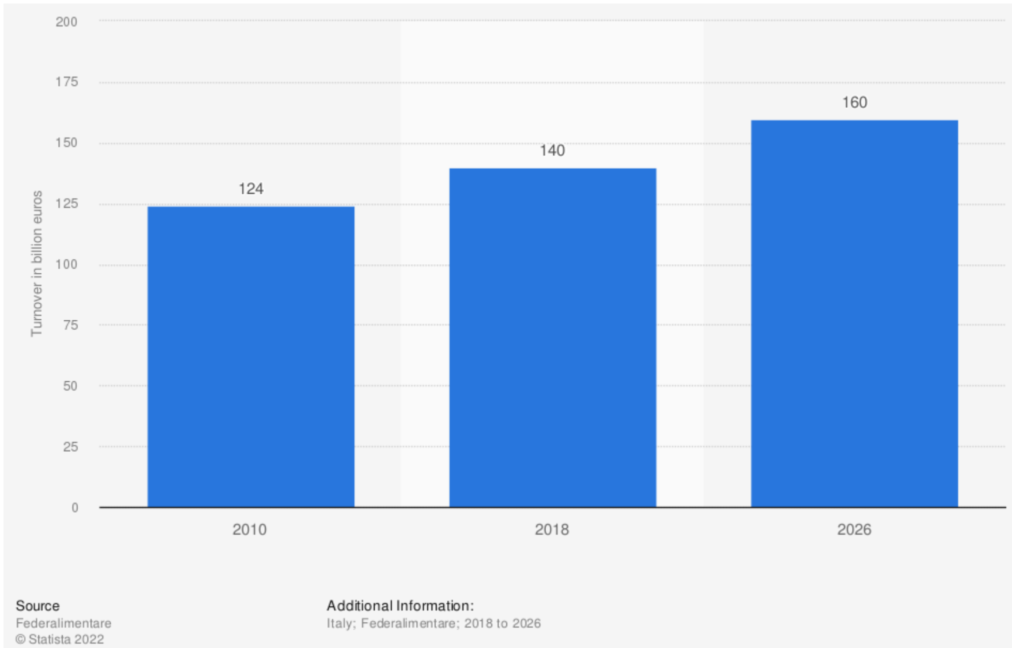

Figure 6: Turnover of Italian Sounding Industry in the food sector, 2010-2026
Source: Statista

By looking at the United States, a sizeable portion of the country's food production can be categorized as having an Italian Sound, meaning that its packaging displays one or more elements that suggest goods' "Italian" heritage. Whilst Italy, the world's largest producer of pasta holds a market share of roughly 35%, the U.S. comes in second in terms of production but sixth in terms of consumption per capita. Pasta is deemed as a typical Italian product with Americans preferring "National" brands because of their reliability and authenticity, but ranking Barilla as the most frequently chosen one (Cembalo, 2008), although it represents the primary example of an Italian expatriate as it adapted its offerings to the tastes of American (or generally foreign) consumers, hence conquering a significant market share to the detriment of Italianness. Similar conclusions were reached through a study involving German buyers (Francioni & Albanesi, 2017). Foreign consumers also say that price drives their decisions to buy pasta, however, they regard Italian products highly hence (too) pricey. Indeed, one of the main factors behind the popularity of IS items is price competitiveness – data reported by Assocamerestero indicate that fake products on the major international markets are distinguished by a significantly lower price than authentic ones. The price difference can reach up to less than half of the MI product's price for imitations. In general, the largest price differences are found in the Netherlands (-64%), Belgium (-65%), Germany (-69%) and the United Kingdom (-69%), as well as for some products sold in the United States, such as dry pasta (-54%) and oil (-73%) (Assocamerestero, 2016, 2018, 2020).

The impact of Italian Sounding not only weakens the international presence of Made in Italy products, which suffer from a price that is difficult to match and from structural limitations related to the industrial fabric, it also impacts the entire perception of Italianness abroad, because it is associated with products that do not respect national standards for quality and craftsmanship and do not meet the same tradition and controls as the Bel Paese. The Parmigiano Reggiano (PDO) denomination is the most copied in the world, "*the one truly globalized cheese*", followed by Grana Padano, Gorgonzola, Asiago, and Pecorino Romano, according to Coldiretti (the dairy industry is especially vulnerable to Italian Sounding practices because of the perishable nature of the products that makes international shipping more challenging and harder to locate authentic raw materials). Other imitations are related to ham, mainly Prosciutto di Parma and San Daniele, Mortadella of Bologna, Balsamic vinegar of Modena, and olive oil. Although in Europe food authenticity standards tend to be observed, it is still possible to find Gorgonzola sold as "Cambozola" in Germany, Austria, and Belgium, "Crosecco" or "Zottarella" in Germany. Last but not least, Pizza is the most globalized food (or recipe) in the world.
As for countries, the phenomenon is highly concentrated in Germany (3.1 billion euros), the United States (2.8 billion), and the United Kingdom (1.9 billion).

This modern phenomenon can be partially framed withing the extremely well-known Country-of-Origin (COO) effect, which describes the mechanism through which "country of origin has a major influence on the quality judgements of a product" (Bilkey & Nes, 1982)[13]; (Marino & Mainolfi, 2013). Nonetheless, IS differs as it is founded on taking advantage of a claimed COO because the product's provenance is ambiguous. While IS items often do state their actual origin by means of less evident correct labelling such as "Made in …", they still display an Italian "allure" by way of some of its peripheral cues (such as stereotypical colours or imagery, as well as a name that "sounds" Italian, etc.). Although this communication and marketing strategy makes it difficult for consumers to realise what they buy, it does not result in counterfeiting since it does not fake its "real" place of origin, but it imitates some characteristics of an "other" country of origin (particularly, Italy).

Born thanks to the Great Emigration of the 20s[14] but somewhat pushed forward by (very) Italian companies choosing to relocate their production in target markets, the parties suffering the most from this

[13] Page 89
[14] In its initial proliferation, IS was contained to expatriate communities, but from the second part of the 20th century on, newfound respect and appreciation for Italian cuisines arose. Italian cuisine became a reference cultural model, beyond specific dishes, meals, or produces. The image of Italy as a tourist destination and the pervasive socialization aspect of F&B consumption in urban contexts led to the popularity of Made-in-Italy in the 80s, that in turn contributed to the uplifting the status of Italian cuisine. As time went by, the now "adapted" style of Italian cuisine became very popular with foreigners from north to south – imports, farmers, restaurants, markets and supermarkets, exploited the appeal of Made in Italy and made produces which recalled the Italian style more and

practice are Made in Italy manufacturers unable to cover the advertising and logistics cost necessary to deal with extra-national realities (and Italian *expatriate* multinationals), whose limited production volumes prevents them from having sufficient bargaining power to be competitive. Moreover, Italy on its own does not have enough raw materials and factories to meet the demand for Italianness on the global food market. The huge demand for Italian agri-food, whose fame is now attracting new customers among the middle-upper classes of some countries where the high pollution harms local agriculture (e.g., China), is difficult to satisfy. Particularly with regard to some specialty PDO items, such as Voghiera garlic, Colonnata lard, or San Marzano tomato, usually produced in limited quantities. Unfortunately, national producers are unable to adequately meet such massive demand, leaving the market open to cunning foreign producers who profit from it by selling false goods and imitations.

What was born as a need for adaptation of Italian emigrants all over the world has given rise to the worst enemy of authentic Italian food. Their role in the spread and success of the phenomenon has been describes as 'from ambassadors of Italianness' to 'enemies of the national economy' (Vedovelli, 2020). As it is possible to infer from the data presented above, today, the confusion generated by food imitations in foreign consumers is considerable, just like its economic impact.

To date, there is a high fragmentation of information related to the phenomenon and there is no real uniformity of data communicated and accompanied by a shared methodology for its quantification. By means of an empirical research, the following chapter of this study will attempt at defining the scope and influence of this parallel economy, particularly from consumers' perspective.

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more accessible. However, at a given point in time, such products and cooking style had hardly anything in common with Italian grandmothers' cuisine.

CHAPTER TWO

Country of Origin and its Impact on Consumers' Choices

2.1 Introduction

The study of the country-of-origin phenomenon and of its effect on buyers' behaviour is one of the most relevant and extensively researched in contemporary marketing. Recognized as a decisive competitive factor for the trade of a product in foreign markets (Kotler & Gertner, 2002), the COO effect has attracted the interest of international marketing scholars for over 50 years (Papadopolous & Heslop, 1993); (Wang, Li, Barnes, & Ahn, 2012); (Hakala, Lemmetyinen, & Kantola, 2013). Led by the pioneer (Schooler, 1965), they have produced thousands of theories and researches which reflect how multi-dimensional, dynamic and relative of a construct the country of origin is (Baughn & Yaprak, 1993).
In its simplest definition, it refers to the impact that knowledge about the origin of a product influences the evaluation of the same by foreign consumers (Usunier, 2006); (Bertoli & Resciniti, 2013).

Many factors are believed to have an impact on it and to have changed it over time, from the country's political, economic, and cultural contexts, to its industrialization level and characteristics products. Research on the matter aims at identifying the impact of the COO on consumers' overall evaluation of products' quality, beliefs about products' attributes, attitudes towards brands, through means of intrinsic and extrinsic cues. In turns, these exert some level of effect on consumers' purchasing intentions, particularly on their perception and evaluation of products'.

The importance of predicting how consumers perceive goods and services and the ways they make a final choice can be equally important for manufacturers and service providers – as it was the case for Italian expatriate companies – and it enables them to gain a competitive advantage. The knowledge obtainable by studying people's habits allows them to offer products and services as close as possible to their needs and wants. Egan J. contributed to this piece of research by adding that better awareness on consumers' preferences increases products' competitiveness also in international markets, thus increasing the export potential for the origin country (Egan, 2007).

This relationship appears to be particularly relevant for specific industries and countries. In the nineteenth century, businesses started operating on the principle of customer-centricity, pushed by the globalization to gain competitive advantage and customer satisfaction. Countries traded to obtain food and beverage[15] goods, that they could not produce domestically on the international market (e.g., Europe exchanged

[15] Hereafter referred to as "F&B"

machinery for bananas from Central America, or coffee from South America). Until the twentieth century, when transportation became feasible[16] and business competitiveness started to be measured by their capacity to attract and retain customers in destination markets. The increasing product variety around the globe triggered changes in consumers demand and forced companies to adapt their offering to foreign consumers' tastes as much as possible. *Buyers and their habits* became the key factor in shaping international marketing strategies in the food industry. Needs, wants, and specific demands of potential customers guide the firm's marketing efforts (van Trijp & Meulenberg, 1996).

Globalization also boosted the diffusion of the Italian culture and food. From its initial proliferation, associated with expatriate communities during the Great Emigration of the 1900s, to the establishment of Made-in-Italy as a reference cultural model in the second half of the 20th century, and finally to the spread of fake Italian products generating a higher turnover than authentic ones.

The purpose of this study is to investigate the components of the so-called country-of-origin effect, particularly in the agri-food industry with Italy as a reference country, and the potential elements that lead foreign[17] consumers to accept, non-accept, or be indifferent when choosing between an IS product and a MI one.

This analysis supports the idea that shaping consumers awareness and understanding about specific products must be an essential element of the business process of F&B manufacturers.
Furthermore, the objective of this study is to provide empirical evidence that buying decisions may not always be the result of careful consideration in each and every purchase. The significance of products' country-of-origin as well as consumers' perception will be examined. These aspects are crucial for nowadays managerial and marketing initiatives and operations.

The aim of the review of the limited available literature is to use current findings in order to create a basic framework from which the current research will start, and to identify a gap left by existing studies that has not yet been investigated.
In conclusion, this literature highlights theoretical and empirical results related to the antecedents of the COO effect as well as on the acceptance of the Italian Sounding phenomenon.

[16] i.e., Cost-effective
[17] i.e., Non-Italian consumers

2.2 Purchase Decisions in the Food Industry

The country-of-origin is a well-established marketing concept. The body of knowledge on the impact that this cue exerts on consumer's choice for F&B goods is broad and expanding every day. The literature has identified a variety of factors that affect buyers' perception of such products, including economic, functional, personal, psychological, and cultural factors.

However, there is still much to learn about how it interacts with the process of making purchasing decisions. In particular, not enough attention is given to the study of this phenomenon in relation to the food industry and to the effect it exerts on quality perception. There are a number of benefits in studying this relationship – global marketers may use it to drive consumers' evaluation of a brand, or to obtain a competitive advantage based on a premium price justified by a positive country image. As a matter of fact, several academics over time have sought to investigate it.

The food industry has been expanding consistently in the past few years and competition in the market is increasing as well, compared to other industries. This is attributable to the fact that, while food is a necessity in life (food and drink are commonly consumed by people at least three times per day), it is also a social and pleasurable activity that has the power of making people feel happy. As explained by Maslow in his theory of Hierarchy of Needs, once a person's basic requirements are met, they desire more (Maslow, 1970). Customers, therefore, look for value when purchasing F&B goods, not only to satiate their basic hunger need, but also to gain valuable nutrients in their daily lives (Menrad, 2003). In an effort to meet growing and evolving consumers' needs and trends (gluten-free, dairy-free, nut-free, veganism, …), domestic and international producers are causing competition to become fiercer.
From manufacturers' point of view, stronger competition forces them to produce more efficiently and sophistically. Moreover, it improves their comprehension of consumer needs and expectations. As a result, the number of products available to consumers continues to increase and companies are shifting towards more innovative and environmentally conscious productions.

When buying a good that best suit their needs and conditions discussed above, consumers are influenced by a variety of elements. For instance, McCutcheon et al. (2009) provided an illustration of a consumer's decision-making process when buying wine. Although buyers cannot taste wine prior the purchase to judge its quality, they nevertheless look for other signs before making a decision, in order to make an informed choice. This indicates that, when there is no opportunity to buy based on quality, consumers will refer to other attributes. Price, variety, style, brand, country of origin, are some of the most influencing ones (Batt & Dean, 2000); (McCutcheon, 2009). The focus of the current work is on this last component, specifically, how and to what extent does a product geographic origin affect the purchasing decisions.

2.3 The Country-of-Origin Effect

More recently, especially in the food industry, the spotlight has been turned on the origin of goods for being the main driver for consumers' choices while purchasing. Literature counts more than a thousand researches on the country-of-origin effect up to 2005, and more than seven hundred published from 2006 onwards.

In general, researchers conceptualized the COO phenomenon as a form of country stereotyping that consumers rely on in their decision-making process when other product-specific information is not easy to find. In these circumstances, buyers will use their image of the country as an indicator of products' characteristics to guide their purchase decisions. This image, or "*mental association*", is frequently activated by specific product cues, and can be represented as a sum of stereotypes about a nation and its manufacturing capabilities (Nagashima, 1970); (Wang, Li, Barnes, & Ahn, 2012). It is composed by various elements that change with time, including the country's political, economic, and cultural background, industrialization level, and representative products. The COO effect is recognized as a decisive competitive factor for the commercialization of a product in foreign markets (Kotler & Gertner, 2002), and it has aroused the interest of international marketing for over 50 years, resulting in thousands of studies reflecting its multi-dimensionality and dynamism.

The notion was first introduced in the 60s by Ditcher who emphasized its significance in understanding products' success (Ditcher, 1962); whereas the first scientific report that examined the link between consumer behaviour and products' COO is attributed to Schooler, who is considered the pioneer in this field. Through a study involving 200 Guatemalan students, he was the first to conclude that the origin of a product can actually have an effect on consumers' opinion of it (Schooler, 1965). A similar research was conducted on the attitude of American consumers with respect of foreign products (USA, Germany, Japan, France, Canada, Italy, UK, Sweden, Belgium, Denmark) and concluded that a strong preference for national products was prevailing among respondents. This result was associated to strong prejudices over other countries that consumers turned into a negative view of related goods (Reierson, 1966).
The degree of development of a country can also influence to a greater or lesser extent the perception that consumers have of a particular good. Some researchers have gone to the extent of identifying a hierarchy of effects among countries [(Schooler, 1971); (Tongberg, 1972); (Hampton, 1977); (Wang & Lamb, 1983)]. The economic, cultural, and political development, as well as similarities with the destination country system, determine this hierarchy. Overall, products from developing countries are considered as lesser than those from industrialized ones. Also, Gaedeke showed that consumers preferred goods labelled as made in the USA over those coming from underdeveloped economies (Gaedeke, 1973). However, there exists some specific country-product associations that not necessarily respect this relationship, as in

the case of Brazilian coffee or Ecuadorian chocolate[18]. In the 70s Nagashima studied the dynamic nature of the COO, which shifts over time in response to historical and social event. He analysed the attitudes of a group of American businessmen towards other countries[19] and came up with a definition for the COO as "the image, reputation, or stereotype that businesspeople or customers associate with goods from a specific country" (Nagashima, 1977). This is the most recurring definition in the literature on the concept, as it highlights how the significance of the COO changes and varies with time[20] and it emphasises how the perceived image of a country is shaped by several national characteristics, as well as by the economic and political background and the history and traditions of the country.
According to Papadopolous & Heslop (1993), the COO principle is "*the result of the perceived national identification or affiliation of a product by consumers, regardless of any explicit or implicit, true or false, claims inherent to the product or the promotion that goes along with it.*" Simply put, a product's COO is what a consumer perceives it to be.

For some, the country of origin is purely the home country for a product, or "the country of manufacture or assembly" (Papadopolous & Heslop, 1993). Others state that the origin of certain brands is intrinsic, for example IBM and Sony respectively entail U.S. and Japanese origins and indicate goods' country of origin using the expression "Made in …" (Chasin & Jaffé, 1979); (Nagashima, 1977).

Up to the 80s, a clear and univocal conclusion was supposedly reached about this phenomenon: "a product's country of origin influences consumers' evaluative judgement of the product" (Pharr, 2005). This was the result of a first line of research, characterized by a "single-cue" approach, which aimed at studying the relationship between COO and purchase intention *unilaterally* (Dinnie, 1994).

However, such initial studies have tended to overestimate the COO effect - from the mid-80s on, researchers broadened their field of vision, achieving more reliable and realistic results. The "multi-cue approach" allowed to dissect the issue in relation to multiple variables, and to the different stimuli and situations capable of altering its effect.

If initially the notion "country of origin" was used in a somewhat wider sense, encompassing information related to the country that manufactures, designs, or assembles a product (Han & Terpstra, 1988); (Papadopolous & Heslop, 1993), the literature then proposed a clear distinction between (Jaffé & Nebenzahl, 2001):

[18] Otter, Prechtel & Theuvsen (2018) show a strong COO effect in German consumers' quality perceptions of cocoa coming from Ecuador, against prejudices about the country development
[19] Japan, France, Italy, Germany, England.
[20] Nagashima associates the impact of the COO to a photograph, which only represents an exact moment in time.

- Country of origin, i.e., the country that consumers associate with a specific product and/or brand, regardless of the place where a product was actually produced.
- Country of design, i.e., the country where the conception and design of a product takes place.
- Made-in-Country, or the country where the manufacture (or the assembly of components) takes place, and which can be clearly indicated on products' labels in the form of "Made in …".

The image associated with each of these countries influences the overall consumers' perception of products. Hence, multi-cue studies focused on the understanding of the interaction between these three "declinations" of origin. Particular attention was given to the first and the third. Several studies investigated the impact of a country's image in relation to some aspects related to the country itself or to its products. These include brand [(Marino & Mainolfi, 2009); (Aaker, 1991); (Johansson & Nebenzahl, 1986); (Nebenzahl & Jaffé, 1996); (Thankor & Katsanis, 1997); (Pappu, Quester, & Cooksey, 2007)]. Studies show a strong two-way relationship between brand and country of origin – on one side, the presence of well-known brands increases consumers' evaluation of their country, on the other, consumers' quality perceptions of brands depend on their country of origin: a lesser country of origin could smear a brand, and in turn consumers' quality perception of its products. For example, Japanese car brands (Honda/Mazda) lose some of their appeal when produced in countries such as Korea, Mexico, or the Philippines instead of Japan[21]. Similarly, Sony's brand image deteriorated when it was manufactured in USA (whilst GE's increased when built in Japan)[22]. Lastly, a key part of a brand's image comes directly from its place of origin when products from one nation are made available to foreign buyers. Here, foreign buyers positive or negative judgment of the nation likely determine how they perceive the brand.

Product type, characteristics, and knowledge about product categories [(Schaefer, 1966); (Olson & Jacoby, 1972); (Huber & McCann, 1982); (Bilkey & Nes, 1982); (Han & Terpstra, 1988); (Agarwal & Sikri, 1996); (Insch, 2003)]. Country-of-origin associations may also refer to goods produced in the country (micro level)[23] and as such it is conceptualized following Nagashima (1970) as "*the total of beliefs one has about the products of a given country*[24]". Most studies indicate that the COO affects both consumers evaluation of specific attributes and of products overall quality. When assessing products' quality, buyers rely on information cues, whether intrinsic (e.g., taste, design, material, performance) or

[21] Johansson & Nebenzahl, 1989
[22] Nebenzahl & Jaffé, 1996
[23] Extant literature identifies two types of country image, macro and micro. The former refers to country-of-origin associations at the country level including cues related with the COO's economic, political, or cultural environment, whilst the latter refers to associations at the product level and includes cues regarding the product itself.
[24] Nagashima, 1970. Page 68

extrinsic (e.g., price, advertising, brand, origin, packaging), the latter come into place especially when consumers are unable to infer actual quality. Because buyers rarely conduct extensive information searches before making a purchase and quality cannot always be detected prior to use or consume (except for repeated purchases), they tend to build their quality perception based on extrinsic cues, among which the country of origin is thought of exerting the strongest influence. For products with foreign origins the COO has even a greater impact in driving buyers' quality conclusions. COO effects are present in all products manufactured or coming from abroad, although there is a propensity in some cultures to prefer domestic items over foreign ones. As for product categories, the majority of existing studies support the idea that the above conclusions are generalizable across most product categories, for instance, the COO effect for TVs is similar to automobiles (Han & Terpstra, 1988). As a matter of fact, the COO is believed of positively affecting UK consumers' opinions about German cheese (Pecher & Tregear, 2000), and of fresh and frozen meat (Schupp & Gillespie, 2001) and it is even considered as the most crucial factor in determining consumers perception of beef (Mennecke, Townsend, Hayes, & Lonergan, 2007). Lastly, people with a high knowledge of product categories, rely more on the COO to evaluate products from unfamiliar brands.

Another interesting aspect is that the "*country image is product-specific*" (Han & Terpstra, 1988), meaning that positive perception given by product-country association is limited to specific products for some countries (e.g., Brazilian coffee, Swiss chocolate, German appliances, French perfumes, Italian fashion[25]). It is evident how both products' intrinsic and extrinsic cues related to the location of origin are able to influence the perceived quality and buying behaviour, particularly in foreign markets.

Involvement [(Martin & Eroglu, 1993); (Neese & Taylor, 1994); (Ahmed, et al., 2004); (Speece & Nguyen, 2005); (Chryssochoidis, Krystallis, & Perreas, 2007)]. Studies show that buyers' involvement with purchases positively affect their trust on the COO. In particular, people having high-level of product-country knowledge, are more inclined to rely on the COO when evaluating low-involvement goods, such as food. Low involvement also leads to a more limited research and understanding of attribute differences, hence, attitudes and buying intentions are substantially more closely related.

Packaging [(Bilkey & Nes, 1982); (Verlegh & Steenkamp, 1999); (Cembalo, 2008); (Hsee, 2008); (Rani, 2014); (Underwood, Klein, & Burke, 2001); (Samiee, 2010); (Raheem, 2014); (Ares & Deliza, 2010); (Etzi, Girondini, Massetti, & Gallace, 2022)]. Packaging has commonly been described as a powerful tool for brand and products to ensure people perceive the concept behind the brand itself and are persuaded into buying its products. The more the packaging is representative of the brand's image, the more it will

[25] Baumgartner & Jolibert (1977); Roth & Romeo (1992); Gaedeke (1973); Cattin et al., (1982).

be successful in impacting consumers' decisions. Eye-catching and cutting-edge designs make a difference in the minds of buyers as they often represent the only exposure to a product that consumer experience before making a choice. Accordingly, besides offering knowledge on some common issues such as the brand, price, nutritional information, products' packaging is used to deliver a message through claims about the manufacturer, ingredients' source, country of origin, in order to make products noticeable on such grounds. These confer character and identity to goods, making it easier for consumers to choose according to the peculiarities they are able to associate. Packages stimulate positive perceptions and are exploited as promotional tools insofar they have a more direct impact on consumers' perceptions than advertising, essentially because most buying decisions are made when buyers are already inside a supermarket, walking through the aisles. Cembalo talked about how American consumers tend to prefer well-recognizable brands when shopping for "Italian" food, which are able to draw their attention through their packaging and claims of good quality. It has been observed that some specific cues exert a stronger influence on perceptions. Specifically, visual elements (images, graphics, colours, recipes…) showcasing country image features are noticed first-thing by consumers, mainly if confronted with foreign foods, to assess their quality.

Cheerful colours and explicative pictures spread good feelings, draw attention, and stimulate salivation and appetite. Pictures and graphics are positively correlated to perceived quality, in addition to colour, which is used expressly to elicit sentiments and emotions. Some studies suggest that these are the most influential factors in consumer decisions for agrifood regardless of consumers' involvement and are even more attention-grabbing if consumers are not familiar with a brand or product. Not only the attribute "colour" itself, but colour combinations that are simple to remember and recall play a key role in hastening consumers' decisions, influencing their feelings about a product and immediately attracting them visibly. Effective designs are able to develop authenticity[26] through accurate labelling. The label "Made in…" is a primary example. In this sense, products that are perceived as being authentic, traditional, or as a return to "good old times" are associated with higher quality and tend to be preferred. Products packaging whose origin is particularly relevant, such as Italian pasta, can leverage the attribute "country" to signal quality. Therefore, visual packaging is a key indicator of how consumers grasp companies and products in the food industry (S.T. Wang, 2012).

Consumer-related variables, such as socio-demographic (age, gender, social status, education, etc.); the level of familiarity with a product and/or brand; the degree of involvement in the purchasing process,

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[26] Authenticity can be defined as "the fact of being original" (Mc Leod, 1999), as being faithful to an original, or as having roots in traditions (Rushdie, 1991).

cultural orientation; ethnocentrism, are usually considered as the antecedents of the COO constructs[27], and have been largely accounted for. In general, it can be concluded that, in the presence of high level of income, social class, and education – which are more usually associated to traveling abroad and interaction with different cultures – the preference for products of foreign origins increases, while it seems to decrease with increasing age (Shimp & Sharma, 1987); (Han, 1988); (Richardson Jr, 2012), meaning that younger people show a more positive attitude towards imports. According to Han, this is due to age being positively related to patriotism. Travel has often been found of enabling "global perspectives", therefore increasing appreciation for other cultures and goods (Wall & Heslop, 1986); (Nijssen & Douglas, 2004). Han also suggests that consumers' quality perceptions based on COO effects are influenced by nationality - a survey conducted by (Bozell-Gallup, 1996), confirms that views vary widely amongst nations. For instance, European customers identified Germany as a quality leader, whereas Japan was chosen in Asia. Two other studies that researched the views of English and French Canadians toward goods from nations with historical ties to England or France found sub-cultural variations in customers' perceptions of COO (Heslop, Papadopoulos, & Bourk, 1998); (Laroche, Papadopoulos, Heslop, & Bergeron, 2003).

Consumers with greater incomes have more unfavourable perceptions of domestic items' quality compared to imports, whereas those with lower incomes tended to hold these perceptions (Wall & Heslop, 1986). The incidence of gender is more controversial, with some studies suggesting that women prefer foreign products more than men do (men appear to be more sensitive to "buy national" campaigns), (Usunier, 1994), others revealing no correlation (Anderson & Cunningham, 1972); (Klein & Morris, 1996), and still other asserting the opposite (Usunier, 2002); (Wall & Heslop, 1986).

Extensive studies have also covered the patriotic and ethnocentric attitudes of consumers, who, regardless of the quality and intrinsic characteristics a good, prefer national products over others (Nagashima, 1970); (Benninster & Saunders, 1978); (Kaynak & Cavusgil, 1983). In turn, this leads them to overestimate the quality of domestic products to the detriment of foreign ones (Han, 1988); (Balabanis & Diamantopoulos, 2004). Ethnocentrism and patriotism are often associated with other socio-demographic characteristics (age, gender, income, etc.) e.g., Han (1988). The preference for national products induced by ethnocentrism may follow from the consumer's belief that the purchase of national products supports their home economy. In the case of patriotism, on the other hand, the consumer's choice is induced by the conviction about the superiority of national productions over foreign ones. Moreover, it has been shown that the image of a given country, from an economic, political, cultural, and social point of view, can influence the intention of foreign consumers to buy its products, regardless of the judgment on their

[27] Pharr (2005) defines *antecedents* as the "*precursors to or determinants of a construct*"

quality (Wang & Lamb, 1983). This is known as *reverse-ethnocentrism* and mainly refers to consumers in developing countries perceiving products originating from developed nations as of higher quality than those from developing nations (Agbonifoh & Elimimian, 1999).

Previous examinations finally indicate a greater propensity to evaluate the attributes of a product using the image of the country associable to it in case of low or non-familiar products and brands (Erikson, Johansson, & Chao, 1984). In this case, the COO image may function as a surrogate variable that facilitates the consumer's evaluation process in the absence of other criteria. The variable has a stronger impact when little else is known about a product, suggesting that the less is known about a business and its brands, the greater the impact of the manufacturer nation's reputation (Kaynak & Cavusgil, 1983). This results in what is known as Halo Effect – consumers evaluate unfamiliar products based on their positive country image, or on whatever knowledge or stereotypes they have about the country.
Some authors even propose that this has positive implications for businesses in less developed countries that cannot profit from a positive COO: they may exploit the Halo effect by disguising their products as having different origins. This is in line with the claim that, if people belonging to a target market have a favourable perception of a given nation, companies can profit from exploiting its image as an enhancement of their products (Speece & Nguyen, 2005); (Giraud, 2002).

As a matter of fact, this second line of analysis questioned on multiple levels consumers' knowledge about the brands they purchase. Most people are unaware of the manufacturing country of well-known products, let alone of unknown ones, but they create country-product associations independently of this, by relying on other extrinsic cues such as packaging attributes and labeling (Samiee, 2010). Besides such cues as packaging colours, images, typical products, gourmand recipes…, informational ones are decisive as well to convey an alleged COO. In parallel to the "Made in…" label, these can take several forms and are used as a foundation for product evaluation by a variety of stakeholders, obviously including customers from various geographic locations (Bilkey & Nes, 1982).

From this careful review of the literature (see Appendix for a summary of the studies covered in the literature review), it is reasonable to conclude that information about products' origin does indeed affect products quality evaluation and it is essential for shaping consumers' opinions and perceptions about it.. Whether they are familiar or not with a brand, or more or less involved with their purchase, they will use this as a "quality mark" for any product coming from a given country. Also, because food is commonly identified as a low-involvement purchase, shoppers spend less time in making a choice and they tend to depend on the attribute "origin" to simplify and speed up even more this process. Hence, the COO can ultimately drive purchasing decisions for agri-food products.

2.3.1 COO & Made in Italy

From the analysis of the literature about the impact of the COO effect on consumer buying behaviour, one of the relationships that recurs most often, especially in researches from the late 90s onwards, is the one between brand and country-of-origin. This interaction has repeatedly led scholars to investigate whether the brand exerts more or less influence than the COO on buyers' choices and, if any, what is the correlation existing between the two.

Extant COO research has mostly adopted a product-centric perspective. In other words, it has paired specific countries with specific product categories, assuming that consumers only purchase brands from these countries because of their superior capabilities and/or reputation in these product categories (e.g., Greece is well-known for its yoghurt, Turkey for its carpets, Holland for its cheese). Nonetheless, numerous investigations suggest that COO effects are also brand-centric – consumers match a nation's image not only to its specific industry- or product-related qualities, but also to its ability of developing good brands (Diamantopoulos, Schlegelmilch, & Palihawadaha, 2011). Consequently, the COO has a driving role not only for product image but also for brand image. A country having strong product image and strong brand image would benefit from the COO impact on both its products and brands; conversely, a country may be well-known for a particular product category, but it may lack the expertise to translate this product-related capability into recognized brands (strong product image/weak brand image)[28]. Additionally, it has been discovered that brand familiarity has a direct and considerable influence on both brand perceptions and consumers' purchase intentions. A greater degree of familiarity is linked to more favourable perceptions of typical regional products, the region of origin, and of associations with the name of the region of origin employed in typical product brand names', and it positively affects consumers' impressions (Paliaga & Oliva, 2013). As mentioned in the previous section and supported by several other researchers, there exist a strong two-way relationship between brand and COO: a brand's country of origin is one of the elements shaping the effect of the brand itself on consumers (Nes & Gripsrud, 2014)[29]. Indeed, recent studies have shown that the nation of origin may be a significant characteristic for brand's positioning in global marketing strategies (Bertoli & Resciniti, 2012). This is especially true when there is a perceived strong connection between the country image and the product

[28] For instance, Germany has a solid reputation in the automotive sector, and is also home to well-known brands such as BWM or Mercedes. Turkey is recognized for its quality carpets but hasn't yet developed any strong brand. Austria has developed several strong brands such as Red Bull and Swarovski, but the country itself is does not have a reputation in these product categories (weak product image/strong brand image). Lastly, countries like Romania do not benefit neither for particularly strong product images nor brands (weak/weak).

[29] L'Oréal ties into the French image of fashion and elegance; Twinings to British tea drinking culture; Barilla to Italian culture of pasta

category (Roth & Romeo, 1992); (Hamzaoui & Merunka, 2006). In these situations, a close connection with a region full of symbolic meanings and values gives products new meanings and raise consumer perceptions of their worth.

Italy – and Made in Italy – is a prime example of the first archetype: *strong product image & strong brand image*. In the Italian context, the COO effect has in fact been used several times to explain the high influence that Made in Italy as a brand exerts on consumers in international markets (Bertoli & Resciniti, 2013). There is a genuine cult of Italy and Italian goods abroad, so much so that many scholars have repeatedly referred to this it like a *brand of origin*, although it is clearly not a brand (Pratesi, 2001). As a reputable brand, it ranks third in surveys for brand awareness, behind Coca-Cola and Visa (Noci, 2015); (Cappelli, et al., 2017), and research by KPMG (2015) shows that overseas consumers recognize Italian products as having a premium price of 20% on average. Most of the value of this "brand of origin" and of products showcasing it, comes down to the COO construct, i.e., on all those country-product mental associations that are activated in the mind of the consumer as soon as they see a reference to Italy (Assocamerestero, 2006).
From this perspective, the Italian competitive advantage stems from a combination of different characteristics that portray the image of "Bel Paese" in the world. Italy is depicted as a country having a rich heritage of history, culture, art and as a symbol of artisanship, quality, taste, luxury, well-being, passion (Fortis, 2005); (Assocamerestero, 2006); (Eurisko, 2007). Accordingly, the commercial value of Made in Italy comes from this vibrant image. Besides presenting itself as a guarantee for its production capabilities, the Made in Italy brand also promises an intangible added value by evoking aspects of consumption typical of the Italian way of living (Corbellini & Saviolo, 2004); (Fondazione Manlio Masi, 2007); (Symbola., Unioncamere, & Edison, 2015). Furthermore, the "Made in Italy" label translates into a competitive economic advantage both in terms of country of manufacturing and country of brand (Vianelli & Pegan, 2014).

Consistently with this country image, the sector of the 4A stands out and enjoys most of the benefits: Food-Wine, Clothing-Fashion, Furniture-Home, Automation-Mechanics[30] (Fortis, 1998); (Becattini, 2000); (Gregori, 2016). For these sectors, the product-country correspondence was empirically tested (Aiello, 2014) and it represents the result of mutual harvesting by artisans and entrepreneurs, who leveraged the image of Italy as a place of manufacturing and tradition and contributed to creating and establishing the Boot's positive reputation around the world, with its highly specialized productions (Fortis, 1998). This resulted in a very strong country-image effect for which, if a product is Italian, then it

[30] Alimentari-Vini, Abbigliamento-Moda, Arredo-Casa, Automazione-meccanica-gomma-plastica

is undoubtedly excellent. Finally, the Made in Italy brand represents an origin trademark that allows consumers to identify real Italian, domestic products and imported ones (Toti, 2017).

Among the 4As, the agri-food sector, which is the focus of this study, is the one that above all enjoys a rather virtuous union with the country in which it was born and raised. On the tables around the world, the Bel Paese offers a highly distinctive offer, renowned for its quality, healthiness, authenticity – the result of a successful combination of environmental and socio-cultural variety (Canali, 2012). At the base of these virtues, there is the *typicality*, that is, the peculiar and often exclusive nature of a cuisine influenced and determined by its geographical areas of origin (Arfini, Belletti, & Marescotti, 2010). Among the territories of the Boot there are a number of *typical products*: 316 *DOP, IGP, and 3 STG products* place Italy first in terms of the number of *protected designations*. As quality marks, these contribute to promoting the reputation of food Made in Italy and represent a symbol of excellence in terms of quality, safety, and control. The relationship with the country of origin – both as the country of good food and of the "Dolce Vita", and as the territory making products unique – represents the basis of the attractiveness of the Agro-food Made in Italy, also from a commercial standpoint (De Filippis, 2012). Some indications of the strength of this brand are identifiable in the extensive and growing share that this sector holds in overall Italian exports (Coldiretti, 2021); (ISMEA, 2022), but also from the increasing number of imitations.

2.4 Italian Sounding

The quality and variety of the Italian agri-food heritage are unmatched. Italian cuisine is well-known and adored by people around the world, as are its products. The intense COO effect enjoyed by the Made in Italy food sector constitutes a competitive advantage that has not gone unnoticed on international markets. Food traditions have been central in the success and, to some extent, idealization of Italian cuisine. They have evolved into strategic marketing tool to generate popularity and commercial success. Advertising, marketing, journals, magazines, and movies have been greatly influencing in constructing the contemporary image of Italian food. This popularity has led to the birth and flourish of a parallel economy which causes enormous harm to Italian businesses by stealing market share from *protected products* and Italian firms. This phenomenon is referred to as "Italian Sounding," i.e., *the use of images, colours, place names, trademarks, that recall Italy, in order to market goods, despite the fact that these have no connection to the Italian originals they are made to look and sound like*. Creating and designing products with an Italian appearance, regardless of its country of origin and quality, deceives consumers, and it is an example of unfair competition against Italian manufacturers. IS products have neither the same Made in

Italy excellence, nor any link to Italy's traditions and culture, which represent the main reasons why foreign consumers seem to choose Italian goods. From the exceptional nature of the Italian agro-food sectors, the IS has only taken the *halo* surrounding these products that exhibit vague references to the country and its gastronomic culture. It transforms a competitive strength for Italian producers – the reputation of Italian cuisine (and wine) – into a weakness. Although its economic significance has been underlined from a variety of perspectives (policy, culture, economy, etc.), as presented in chapter 1, comprehensive scientific knowledge of its social-psychological foundations is lacking.

In international marketing literature, this practice is generally known as "Country Sounding" from the English expression x-sounding[31], and it consists in displaying on product packaging some commercial/marketing elements that allude to a different geographic origin than the real one (Papadopolous & Heslop, 1993). Another example are German tools and machineries: because they are known to be reliable, foreign companies sell items having German-sounding names, such as Gosch (immediately associated to Bosch, a famous German brand)[32].

In the Italian context, many believe this expression is synonymous with words such as fake, copy, counterfeit; in complete contrast with the expression from which it originates (Made in Italy), which as previously described, generally holds a positive connotation. This is because the producers who employ this tactic are not Italian and their products are not produced in Italy. The presumed link with Italy is merely constructed by means of a mix of words, colours, images, recipes typically associated with the country. As anticipated above and backed by others, the purpose is to capitalize, even in part, on the outstanding reputation that food made in Italy enjoys (Magagnoli, 2013); (Gregori, 2016). Kahneman's theory of emotional consumers has inspired many studies on the functioning of this "recalling strategy": Viale argues that, to trigger a mental representation of Italianness in consumers' minds, it is not necessary that the product is manufactured in Italy, but it is sufficient that a symbolic link leads them to see through green-white-red-coloured glasses. Even if they consciously and rationally know that the product is not Italian, emotionally they feel the opposite, therefore, the brand, communication, and marketing, prevail (Viale, 2012). This is consistent with the belief that, in the global food market, distinctiveness comes from which and how the provenance of a brand or product is perceived, and not where a company produces (Vianelli & Pegan, 2014).

In contrast with this view, Confagricoltura posits that foreign customers buy fake or imitated Italian

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[31] The expression x-sounding is typically used in neutral fashion to describe a resemblance between an object and a country's reputation. it has not clear negative or positive connotation in people's minds.

[32] If a company manufactures fashion, then its products benefit from having French-sounding names; a company producing electronics will benefit from having Japanese-sounding products' names (Tai, J., 2010)

unknowingly, implying that more information on how to tell apart the fake, imitation, and originals, is necessary to educate them (Confagricoltura - Guidi, 2012).

The COO effect has often been applied to explain the phenomenon of Italian Sounding. From what resulted from the review of the available literature on the COO presented in section 2.2, it is reasonable to presume that the country-of-origin has a major influence on perceived quality of products. Furthermore, country of origin may be manipulated without altering the actual product (Olson, 1972) – this represents the basis of country-sounding phenomena. For what concerns Italy, (Fournier, 1998) analyzed the case of a second-generation Italian American woman with a great attachment to Italian goods, particularly those pertaining to food. Her study found that Italian food carries highly significant emotional and symbolic meanings for people. This is consistent with several other studies that state that, besides serving as a quality cue, the country of origin of products holds a symbolic and emotional value. It may signify prestige, authenticity, or exoticism, by connecting a product to a rich country-product imagery and to a nation's identity, with emotive and affective overtones (such as memories). These studies show that such symbolic and emotive associations make the COO a "expressive" or "image" attribute that eventually determine consumers preferences (Batra, Ramaswamy, Steenkamp, & Ramachander, 1999); (Askegaard & Ger, 1998); (Botschen & Hemettsberger, 1998); (Lefkoff-Hagius & Mason, 1993).

The Italian Sound is an excellent example of how the COO can decisively and concretely influence the market, companies and their marketing and communication policies, consumers and their purchasing choices. The phenomenon owes its effectiveness to two elements: the first is due to the profound fascination that Italian culture exerts in the world and to the enthusiasm that Italians have in transmitting their traditions and customs, the affirmation of Italy as a style setter (Onida, 2004); the second can be attributed to globalization and the spread of the internet, which has changed marketing policies, adapting them to the new way of accessing and disposing of information (Goodman, 2003).

As a matter of fact, to be able to imitate Italian products, including the emotions, traditions, and symbolic meanings that commonly surround them, it is necessary to leverage specific experiences and manufacturing skills. Originally, these were provided by Italian emigrants. Since the beginning of emigration flows, the phenomenon has grown considerably, mainly thanks to the establishment of companies by expatriates in new countries, where they initially continued to produce the same goods as the ones produces in Italy, but later they moved on to create different products with different raw materials, whose connection to Italy was limited to brand names recalling Italian ones. Eventually, the descendants of Italian expats did nothing more than use their surnames as a trademark for products that, in reality, had nothing to do with their implicit homeland or with genuine MI foodstuffs. This gave rise to one of the four main imitations types identifiable from the literature and marketing practices.

2.4.1 Forms of Imitations

In respect of this phenomenon, it is crucial to make a distinction between Italian Sounding and counterfeiting – the latter is legally enforceable and consists in the illegal falsification of registered brand and protected goods. Labels providing false information about products are illegal almost all over the world (Agro-Piracy)[33]. False information includes wrong evidence about the origin of raw materials, the producer, the manufacturer, the brand (to capitalise on the reputation of another), the commodity identity (attributing qualities to the product that it does not possess), or expiration date. On the contrary, imitation practices are allowed. In this case, labels and packaging provide *misleading*, rather than false, information. This marketing strategy includes brand names, product names, but also packaging and labels. As briefly mentioned in the previous chapters, IS takes advantage of a false COO and of ambiguous product's origin. While similar items often state their true provenance, they still display an Italian "allure" by way of some peripheral cues, such as stereotypical colours or imagery, as well as a name that recalls Italy, specific wording…. Despite the efforts made to protect MI over time, the spreading of IS did not stop. Moreover, with reference to the regulatory context, IS products are compliant with labeling regulations, therefore, they simply constitute a deceptive and aggressive marketing practice and not an illegal action, as such, they cannot be challenges or sanctioned.
It is, therefore, appropriate to identify at least four categories of imitation, which are based on the products' features that constitute a lure form to Italy, and on the degree of clarity or ambiguity from consumers' point of view.

1. A first form of imitation is represented by the use of allegedly Italian unregistered recipes, or of false Italian recipes, i.e., culinary false. This imitation invokes the country in a more or less strong way, and most importantly, in a more or less clear or distorting way. It may involve creating brand-new recipes and passing them off as original, or incorporating phoney Italian ingredients into traditional dishes, as in the case of "Bolognese sauce". The most popular fake recipes/products include chicken parmesan (Parmigiana di pollo), pasta and meatballs, Mac & Cheese (Maccheroni al formaggio), Italian dressing, and Alfredo sauce. When "Ragù alla bolognese," for instance, is denoted on a product label by the words "Bolognese sauce," it is obvious that the reference is simply to the recipe. The presence of similar wording should make it clear that the reference is in fact exclusively to the name of a recipe (whether it is more or less true to the original, or unregistered); instead, it often leads consumers to think that those products are truly Italian. Most of the times, these recipes do not exist in Italian traditions, and are not

[33] The widespread use of counterfeiting techniques in the food sector, the term "agro-piracy" is now frequently used to describe the entire phenomenon (Ballarini & Petroni, 2008).

made using raw materials coming from Italy. Furthermore, this restricts the use of authentic recipes as a valuable tool to promote Italianness in the world by Italian companies and by the industry of made in Italy because it as a whole, harming them.

2. A second imitation and improper reference to Italy is the use of graphic and photographic signs on products packaging to clearly evoke the country. As explained above, packaging attributes are powerful tools in increasing the perceived quality of products in consumers' minds, especially when it is possible to manipulate country images that typically enjoy a positive recognition. An example is the use of the colors of the Italian flag, a drawing of the "Italian boot" or of one of its regions, or images referring to the likes of famous places or monuments, such as the Colosseum or the Tower of Pisa. In the latter hypothesis, it is rather easy to see images or photos of Vesuvius used on the packaging of peeled tomatoes in order to recall their "Neapolitan" origin. It is also frequent to see representations of families or homes, to convey the idea of warmth and tenderness typically associated with the Italian way of life and "la dolce vita", that clearly confuse buyers.
3. A third type of Italian sounding consists in the use of Italian names or surnames as brand's or companies' names, even if these are legitimately registered abroad. This aims at characterizing brands or companies as belonging to Italian descendants (and as such, authentic) although they have lost every productive and cultural link with the mother country. Some common examples are "Da Vinci" and "Gattuso", respectively "inspired" from a renowned Renaissance inventor and football star from the 2000s. Another version of this third imitation is the use of generic names of Italian products, such as mozzarella or spaghetti, that are able to create immediate connections to the actual products and are often used to evoke the wrong suggestion in consumers' minds that an Italian manufacturing is somehow involved. It is fair to say that these words identify a recipe rather than a product, even if, when produced abroad, they differ substantially from the ones originated in Italy. For instance, while Pasta in Italy can only be made from durum wheat, in other European and non-European countries this limitation doesn't exist, meaning that soft wheat can be used as well. This has clear implications on the quality of the final product, making the two categories of product non-comparable. This is one of the most widespread types of imitation. Although it must be acknowledged that some Italian names are now universally known, in particular among extra-EU countries consumers do not know or even recognize the roots of these names. In this circumstance, it has not yet been addressed whether consumers that buy these items are aware that the presumed Italian origin is not just implicit at the time of purchase. In many others, instead, their use is deliberately ambiguous and deceiving on the part of companies. Within this category, a study on food product imitations in the U.S. by Nomisma makes a further

distinction between references to Italian products that are not present in the American dictionary (examples are gelato, pane, mascarpone, pomodori); and references to Italian products that are also present in the American dictionary (examples are pizza, pasta, caffè, ricotta). Because both feature references to the country in the form of mentions of product categories or, simply, of words or names, they have been bundled into a less straightforward and obvious model (Nomisma, 2003). In fact, these causes a more generic and imprecise product-country association, but just as harmful.

4. The last case is the obvious reference to Italy, while absolutely untrue. Examples are the explicit use of the Italian flag (not only of its colors), the name of Italian cities, regions, places, Italy itself, random words ("amore", "nonna", "gusto") or expressions such as "product of Italy", "Italian style". This category is attributable to a model of evident "imitation of Italian geographical indications" as it includes goods in which the reference to Italy is clear and unambiguous and aims at evoking in the consumer the elements of the Italian gastronomic tradition through the use of allusions to typical products and/or geographical areas. In practice, products falling within this model associate their names with places where quality productions take place and appropriate the notoriety and international success of Italian food productions as a means of establishing themselves on the market.
   It is straightforward to see that the size of this allure, specifically quality-wise, seriously puts consumers at risk in terms of misjudging the product's origin and not perceiving the real value and features of what they buy. This obviously creates a mismatch between consumers' expectation of what a Made in Italy food product is, particularly if they are familiar with the country and its products, and what they end up consuming, therefore damaging the reputation of the Made in Italy brand.

Finally, it is often the case that these imitations are simultaneously present on the same product packaging and/or label. For instance, any of the elements reminiscing Italy may be used to market one of the recipes previously mentioned – an Italian name, flag colours, a picture or name of places (Rome, Tuscany, …). Here, the intent of imitation and abuse of the reputation of Italian agri-food products in favor of products having quite distinct characteristics is evident.

The explicit reference to Italian Protected Designations of Origin has been deemed to be the strongest degree of imitation, since it refers to goods that, at least within the EU, are protected by Regulation (EU) 1151/ 2012, which forbids their use if the relevant production specifications are not followed. In the open discussion on the issue of protecting and promoting typical food goods globally, this is set up as a possible instance of counterfeiting. Reference to geographical places ranks second in terms of the damage caused to the made in Italy, also, the presence of the name "Italia" and its derivatives has come down to this instance as well, even though it is not a denomination of origin, the ultimate purpose is still the exploitation of the fame and success of Italian culinary productions at the expenses of MI.

On one hand, this signals a deliberately misleading action towards consumers, on the other, it can be seen as unfair competition towards other producers, especially towards the imitated ones, that is Italian ones. Figure 7 shows a summary of the forms of imitations described so far, as well as their essential difference compared to counterfeiting practices.

CATEGORY	TYPE OF IMITATION	EXAMPLE OF IMITATION	CASES OF ILLEGAL PRACTICE	CASES OF **NON**-ILLEGAL PRACTICE
FALSE MADE IN ITALY (COUNTERFAITING)	Brand Design, Model Registered Recipes	Parmesan Cheese Romano Cheese Mortadella Chianti, Prosecco	Anywhere registered	If not registered
	"Made in Italy"		In Italy	Hard to prosecute
	Designation of Origin (PDO – PGI)		In EU and anywhere bilateral agreements on the object exist	Anywhere else, e.g., in the USA
ITALIAN SOUNDING	Italian unregistered recipes	Bolognese sauce Chicken parm Alfredo sauce	-	Anywhere
	Colours and images evoking Italy	Italian colours, The Colosseum	-	Anywhere
	Italian name / surnames, Brands registered outside of Italy, Company names, Generic product names	Gattuso Da Vinci Alberto's Spaghetti Mozzarella	-	Anywhere
	Italian flag, Italian boot, Names of cities, regions Generic Italian words and expressions	Pictures / images of Italy Rome, Naples, Tuscany "nonna", "amore", "gusto" "like Italians do" "product of Italy"	-	Anywhere

Figure 7: Counterfeiting vs Italian Sounding & Forms of Imitation

As a matter of fact, the concerns on the side of Made in Italy producers are major when it comes to the Italian Sounding industry, however, there is an equally-concerning issue not sufficiently emphasized – Italian companies are not the only "actor" damaged in these scenarios of unfair commercial practices, rather, consumers are negatively affected by the mismatch between their expectations on quality and the characteristics they are eventually presented with at the time of consumption. The last "player" to consider is the Made in Italy brand, or better put, its reputation. The discussion concerning Made in Italy imitations must be maintained logically separate from other phenomena, sometimes, though, other issues relatively common to the agri-food industry, such as contamination of food products, health and safety issues, commercial fraud, intertwine with the Italian Sounding, bringing along very negative repercussions and compromise the image and value of authentic products, our country, and overall, of the Italian brand (Canali, 2012).

Overall, this phenomenon manipulates consumers' unconscious mental processes (Figure 8): first, the impact with a packaging displaying Italian elements draws them to conclude that the product is in fact Italian (country association). Second, having determined an Italian origin, the product must be delicious, nutritious, and authentic (country-of-origin effect). Last, since the product is genuine and its origin has a favourable reputation, it may even be acceptable to pay a premium price for it (Ballarini & Petroni, 2008)[34].

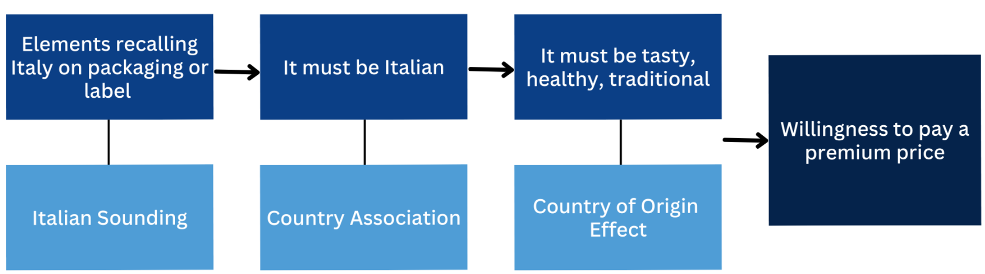

Figure 8: Consumers' unconscious mental process when evaluating IS goods.

One last issue to account for is information-wise. To be able to actually distinguish authentic products, it is necessary that the buyer can easily find the information relating to the geographical origin of the

[34] It must be specified that the premium price mentioned here refers to IS products which are typically more expensive than Generic ones, yet still much cheaper than authentic ones. Consumers may be willing to pay more to buy Parmigiano instead of a less well-known cheese, however, they will be probably buying its American equivalent because of its price (Cembalo et al., 2008).

product – besides guessing it from its packaging colour – whether this is indicated on the product itself, on a document that accompanies it (and visible to the purchaser) or provided by the seller. It is common, lately, to see this condition of explicitness becoming less prevalent over time because, in the absence of a legal requirement, many businesses prefer to omit the origin of the product from the product itself. This is – in addition to the diffusion of decidedly generic indications (e.g., made in Europe), or of fantasy (made in "nowhere"), or rather complex (for instance, assembled in. ... from US made parts) (Bertoli, Busacca, & Molteni, 2005).

Hundreds of consumers in France can mistakenly believe they are getting a classic Italian dish while they buy Zapetti ravioli. A quick glance at the label reveals that this is a French pre-cooked product, hence, the information supplied to the consumer is faultless - the host who offers their guests "ravioli Bolognese" might still satisfy their desire of sharing an Italian dish as well as their need for exoticism and distinctiveness by consuming an IS recipe. There may even be buyers who don't read labels or simply feel confused. This is a sensitive subject because, despite having access to all the formal information required to make a decision, consumers may be unable to decipher the information (Magagnoli, 2019).

Therefore, Italian Sounding impacts the most emblematic foods of the national cuisine identity. The common trait of all the hypotheses just analyzed, as well as of counterfeiting, is the potential for a foreign company to gain a competitive edge on its target markets by associating the Made in Italy image with its products, generally appreciated by foreign consumers, without the presence of a connection to the Italian region. In addition to the damage caused to consumers, who run the risk of perceiving the origin and characteristics of the "imitated" products in a distorted way, Italian manufacturers, committed to guaranteeing high quality standards, find themselves having to compete globally with goods that boast Italian origin, that categorically do not respect the same criteria but cost much less.

2.4.2 Price vs Taste Effects

It has been noted how Italian agri-food is marketed as upmarket. Its strength points are tied to both the organoleptic quality and to the features pertaining to the public imagination – the country-of-origin effect (Ismea & Cogea, 2005). However, the high cost of goods has often been cited as its single drawback. Various studies have, instead, observed that the Italian-like products are generally offered at prices lower than authentic ones, but still significantly higher than generic items. IS exploits aggressive marketing techniques and it does not bear the costs of production and transport that goods coming from Italy do (De Filippis, 2012). It may be in this price differential that the economic competitiveness underlying the diffusion of Italian Sounding lies (De Pin, 2008).

It should be considered that any reference to Italy (whether true or presumed) lends the product an added value, based on the perceived higher quality and on the country-of-origin effect, such as to allow its positioning in a higher market segment than generic products. Market studies have showed that the price placement of fakes seems to be in the middle when compared to Made in Italy products (higher extreme) and the average market (lower extreme). According to a survey carried out by the MRA on the shelf price differential of misleading and original products in North America, non-misleading products cost even more than double the fake ones in the exceptional case of pasta, but such high price concerns designation of origin too such as cheeses (Parmigiano Reggiano and Gorgonzola), meat (Prosciutto and Mortadella), vinegars balsamic and olive oils – Figure 9 (MRA, 2008).
In general, truly Italian products – MI – are placed in a decidedly higher range than the average market price, with a difference of about +90%. The presence of Italian sounding elements, while presenting a lower price positioning than the MI, still allows for a price positioning between 30 and 50% higher than standard products, clearly placing itself above the average market price. Nevertheless, authentic products price is still around 40-50% more than imitations', but it reaches peaks of -70% in some countries (e.g., Germany) (Ambrosetti, 2022).

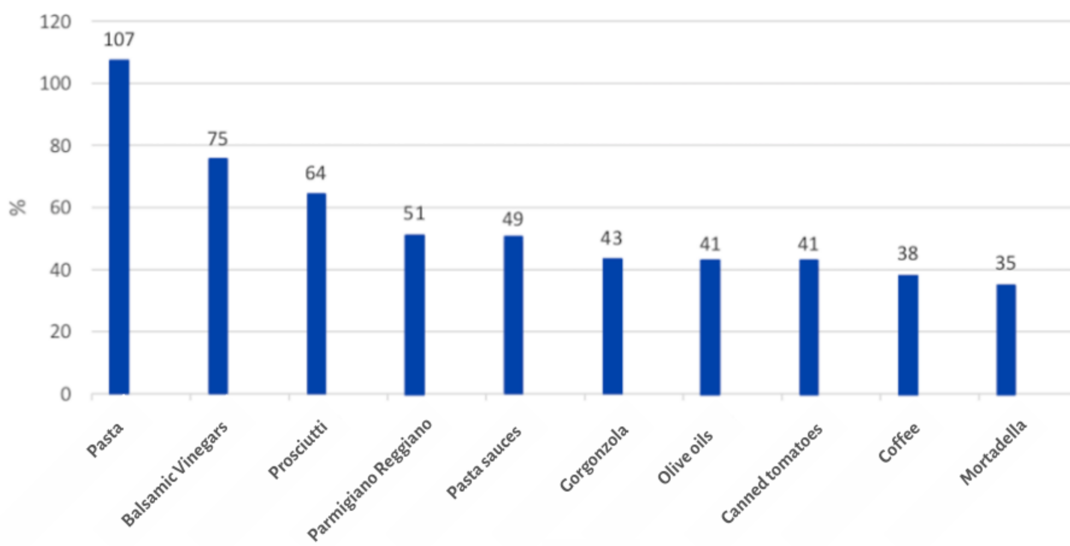

Figure 9: Price differential between NOT misleading and misleading products as a percentage of the average product cost.
Source: MRA surveys on the North American market

In a a study on pasta in the US market, Cembalo (2008) theorised that the market's segmentation by price and purchasing power is caused by the lack of gustatory tools sophisticated enough to judge the quality of Italian and Sounding products. While the former are appreciated and purchased by a small niche of connoisseurs, the wide availability of Italian-ish, with lower quality but also lower prices, satisfies that remaining market share which does not attribute any qualitative superiority to Made in Italy such as to justify the premium price. Furthermore, it must be accounted for those consumers who, although educated on the difference, are not willing or able to pay the premium price typical of Made in Italy. After all, as reported by a survey by Censis (2012), consumers themselves admit that they see in Italian Sounding an opportunity to buy the desired product at an average quality and a competitive price. Hence, it may be that that price factor plays a decisive role in purchasing decisions especially where the consumer does not detect significant qualitative differences between the products offered or is unable to identify the right price-quality ratio for food products. It may also be that, in correspondence with a (significant) price reduction, consumers would be willing to buy a different product despite its "less favorable" origin.

As much as qualitative, the differences in taste between gastronomic cultures justifies the presence of diverse foods in the world. Accordingly, the distance between palates, not only geographical, could represent the discriminating element underlying the preference of sounding products over genuine Italian ones (Magagnoli, 2013). The ability to distinguish between an Italian product and one with an "Italian-sounding" name is indeed another implication of IS on consumers. Sometimes, particularly in the case of Mediterranean cuisine, the distinctions between various food cultures may be reduced to variances in "accents". In other instances, the distinctions broaden to encompass the most fundamental flavours (bitter-sweet; sour-salty) and go even farther to encompass the order of the courses and flavor-and-color pairings (Magagnoli, 2019). Italian cuisine has recently attracted people from other gastronomic traditions. For instance, stores in the major Chinese cities are now stocked with European goods (Italian or local goods marketed as such). Middle classes have 'adopted' European dining customs by consuming French wine and Italian cuisine (Mam & Berger, 2012). However, the socio-cultural drive to showcase a social status (Johansson & Nebenzahl, 1986) by engaging in European consuming behaviours is different than being able to navigate between hundreds of Bordeaux red wines or various Italian cheeses. It is altogether another thing to really choose a high-quality IS product that tastes very close to the original over a genuine European wine or cheese (Busato, 2011).

Well, once again, Italian Sounding seems to go beyond the boundaries of mere imitation and becomes a re-design of original products in order to satisfy the tastes and preferences of local consumers (Cembalo, 2008). If it was, therefore, a pure matter of taste, the only solution for Made in Italy to conquer this share of the market would be to adapt its typical features to the tastes of foreign consumers. Consequently, the possibility cannot be excluded that consumers, although aware of the difference in terms of quality and regardless of price, simply prefer IS products because they are closer to their tastes. An opposite yet valid possibility is that identification, sense of belonging, social status, are what determines customer preference, and not taste, which may explain why an IS product with a hybridised taste is frequently chosen over the original.

Although the implications of the COO are framed within a cognitive process, its effect has to be viewed in broader terms: from the implications of consumers' inferences and attributions, as well as consumption decision-making processes, up to more or less stable consumer habits, and social identities in terms of consumer's practices. Despite all, existing literature has given no further attention to this process.
Most studies have focused on Made in Italy from the point of view of Italian consumers, or on country-sounding phenomena, without underlining the importance it holds for Italy. Correspondingly, not enough studies have used these theories to understand consumers' perceptions and purchase decisions.

Nevertheless, today the label "Made in Italy" encompasses a selection of goods and services for which Italy is clearly recognized for its high standards of excellence, originality, and design, which shape how the world views Italian culture and way of life. The brand has also excelled as an export generator and a major source of competitive advantage. These factors all promote differentiation tactics that rely on the "uniqueness" of Italian cuisine. The authenticity and reliability of the place of origin factor, hence, is vital to maintain the respectable reputation of the Italian agri-food industry and, ultimately, drive its competitive advantage.

2.5 THEORETICAL FRAMEWORK

Through the analysis carried out in this initial stage of the study, it is possible to gain an overall understanding of what current research has discovered about the factors influencing consumers' buying intention. The literature review has portrayed the consumer behaviour scenario, starting from its antecedents, to its variables, from various contexts and stimuli, to business implications. It has been essential to have a deeper understanding of these topics to finally establish a framework for this study.

First and foremost, a gap in the literature will be revealed that, to the author's knowledge has not been filled by any recent research. To investigate the gap left by literature, a research area will be developed, which will serve as the study's core point, and three research hypotheses have been designed based on what is known from the existing literature.

2.5.1 Emerged gap from literature

Numerous facets of the consumer behaviour, the role of the country-of-origin in guiding decision making, and how the strong the correlation between is at the basis of an industry-wide phenomenon, have been emphasized by the evaluation of existing literature.
According to available research, the mental association resulting from product-country extrinsic cues is among the most significant element in shaping consumers' perceptions and their purchasing behaviour about agri-food items. This represents the foundations of the entire body of literature on the understanding of buyers' choices in similar contexts. Although, as analysed in the Chapter 1, the Italian Sounding industry is one of the most profitable industries in Italy and around the world, exceptionally relevant for the Italian market and the Made in Italy industry, not enough importance is given to this particular field in the literature observed.

The F&B industry, as depicted in chapter 1, is known for being a fiercely competitive one, where the first mover makes the difference and market share is essentially tied to costs and prices. Therefore, consumers-related issues are expected to be given significant attention, as every company's decision revolves around them. Abundant studies have emphasized their general significance, but none have looked at the role of consumers in this specific sector.

Moreover, the majority of the analysis conducted over the years on this wide topic are older than recent times, thus they investigated a less globalized society. Additionally, there are not enough researches carried out in Italy, as a large part of literature focuses on the U.S. in relation to Asian or South American markets.

The Made in Italy label enhances the desire and appeal of products for consumers, not only because it represents a quality cue, indicating products' geographical origins, but also because of tangible and intangible features related to them, such as traditions and culture. If foreign consumers do not have information or knowledge about Italian food products, or lack the ability to classify it, they may justify their purchase according to their perceived country image, which is based on whatever knowledge they may have about a country itself, even if unrelated to the particular product category they are buying. Because of the possibility that Italy's already favourable reputation in the 4A industries may also expand and apply to other sectors, the damage due to the wrongful use of Italian icons could be massive. This idea strengthens the incentive for the current research.

While "Made in Italy" is confirmed as a conceptual category consolidated in the minds of consumers, since there is a clear recognition of related products in terms of qualitative characterization, there is no extensive literature on the perception of the real worth of this brand on the part of foreign consumers. Prior research has merely looked at the antecedents of customers buying behaviour. Although sufficiently accounting for country-of-origin factors, it has not analyzed the antecedents of the Italian Sounding phenomenon in details nor its acceptance in the food sector.

Earlier studies served as the cornerstone for creating the framework for the application of the key factors to the agri-food industry. As a result, the elements discussed in the literature can be applied in a similar manner to every other industry, in this case, the agri-food one.

The present research aims at filling this gap by analyzing the possible motives, intentions, and causes behind the overwhelming popularity of false Italian from the point of view of consumers. One of the main factors that the current research wants to evaluate is the rationality behind consumers' choices for Made in Italy versus Sounding products. This correlation is the final objective of the study.

These concerns will be investigated in the following section. First, it is necessary to describe more clearly the issues that the research wants to address. By assessing the phenomenon, it will be possible to represent the research's central topic and derive the answers that follow.

2.5.2 Research design development

The knowledge gained from the through literature review allows the development of conclusions on the focal point of this investigation.

Given the limited studies addressing this set of phenomena, in particular on the social-psychological processes regulating IS consumers' choices, the present study is developed with the goal of examining the effects of IS on consumers' assessments of agro-food products associated with Italy and their consumption choices for such targets.

The main goal of the research is to determine whether a product's COO label, *when viewed in terms of IS*, can affect the product's "Italianness," its general reputation, and associated specific reputation features, as well as the attitude of consumers toward that product.

This study will be conducted by means of some questions on how several drivers, identified from available information, affect consumer acceptance for Italian sounding products. To answer to this question, a research is going to be conducted to examine consumers intentions on the questions themselves. The exploration will consider, in particular, the agri-food sector in Italy, in which the phenomenon plays a crucial role from both a cultural and economic point of view. This is because of the highly competitive market which enables foreign companies to gain a competitive advantage at the expense of Italian ones and of final consumers.

Given this competitivity, Italian companies must find ways to win and retain foreign consumers, to ensure the preservation of authentic Italian food. Even though Italian fakes do not have negative implications on consumers' health and do not always imply low quality, they do represent a threat to the identity of traditional Italian food, not only to the Made in Italy export economy. Imitations limit the diffusion of authentic Italian recipes which represent a strategic instrument to the promotion of Italianness in the world. The risk that foreign consumers identify culinary false, whether recipes or products, as authentic and representative of the Italian lifestyle, is high. In order to overcome this, it is necessary to understand the root of this social-cognitive issue. Therefore, the aim of this study is to confirm the idea that customers perceptions can influence their choices when triggered by specific elements, interpreted as favourable to consumers' conditions.

Everything that has been said up to now allows for the development of the following three areas of research and questions for empirical comparison. According to the presented relevant body of research, imitation archetypes 1 and 3 imply that consumers are deceived into buying IS products because of identity elements – Italian way of life and habits, emotional and affective meanings, memories from holidays, sense of belonging to the country through its culinary culture, traditional recipes passed down from generation to generation through Italian immigrants and as such authentic. The literature analyzed in the first part of the chapter has stressed how all of these symbols are used by foreign consumers as quality indicators of Italian food. Since high emphasis is placed on the relevance of these two forms of imitation, it is reasonable to infer that they have a significant impact on consumers' choices for MI and IS.

Moreover, as previously mentioned, when it comes to food and especially to unfamiliar brands and/or products, consumers rely on extrinsic cue to assess quality prior to purchase. Identifying the country of origin, hence, helps them in speeding up this process by acting as a quality signal for all related purchases. Often, information retrieved on labels and packaging is the only exposure to a product that consumer experience before choosing. Consequently, as indicated by forms of imitation 2 and 4, packaging and labels are designed in such a way to be appealing to consumers and differentiate IS products and its characteristics from generic ones. By leveraging on visual elements, massively present on IS packaging, such as graphic representations of Italian landmarks, precise wording summing upon Italy, or some presumed Italian raw material, IS may manipulate unknowing consumers into buying. Accordingly, this is the first research area, which will investigate the magnitude of the impact of visual and identity elements on the perceived quality of Italian products, which in turns determine consumers choices for IS or MI goods. The resulting first hypothesis is:

H1: Perceived quality is positively related with Purchase Intention for IS products

People tend to instinctively imagine certain characteristics of how a product looks, tastes, feels, or smells, after looking at images and products' description (Underwood, Klein, & Burke, 2001); (Silayoi & Speece, 2004). Explicative images and the Tricolour deliver positive vibes and contribute to attract interest, increase salivation and craving. Besides colour – which is specifically employed to evoke feelings and emotions – illustrations and graphics are positively related to product perception and intention. Also, traditionally, food is considered as a low-involvement product because of its habitual trait. In this context the decision-making journey is short[35] and consumers are driven by their first impression of a product/brand, which, because of the quality attributed to Italian products, will probably be positive. Finally, it has been stated more than once that the success behind imitations may be attributable to the desire of foreign consumers of feeling Italian. Hence, it is reasonable to believe that this first hypothesis will be confirmed.

Another key factor is price. Regardless of any distinction between opposite products and substitutes, Made in Italy and Italian Sounding products could find themselves in a direct confrontation in the competitive environment of a large market, where the consumer considers the respective products perfectly substitutable and consequently chooses on the basis of the price. In this situation, Italian Sounding could be said to effectively harm Made in Italy – on the basis of more affordable prices, it could

[35] "An evaluation of attributes and alternatives is less important in low-involvement product decisions" Grossman & Wsienbilt (1999).

gain a competitive advantage also on those knowledgeable consumers who purchase Made in Italy but are price-sensitive. As a result, this research area will assess whether the consumer is able to recognize a qualitative difference between MI and IS and, if so, whether they buy IS exclusively because of lower prices. The second hypothesis will, then, be:

H2: Element price is negatively related with Purchase Intentions for MI products

Finally, in the circumstance in which consumers are aware of the differences between the classes of products at stake, the perception of such differences, from the country of production to quality and taste, could explain a greater propensity of consumers towards a product over another, suggesting the existence of a competitive advantage based on differentiation by IS, which is typically "adapted" and therefore closer to the tastes of foreign consumers, compared to Made in Italy. The detection of such instance comes down to the observation of the following proposition, which states that the consumer is able to distinguish between authentic and false Italian, and accepts the qualitative supremacy of the former, however, they prefer IS products because of taste, regardless of economic considerations. The third and last hypothesis is:

H3: Element taste is positively related with purchase intentions for IS products

Much of the research into COO relates to a simple conceptual model that involves antecedents, moderators, and outcomes. Because the IS phenomenon has generally been explained by the COO, this model can be implemented to the research into it as well. Moderators are factors that serve to reduce the impact of an effect (Walley, et al., 2014). In the case of COO, moderating factors that have been used include context[36], consumers' education[37], nationality[38], product knowledge and expertise[39], product familiarity[40], trust[41]; ethnocentrism[42]. Researchers have used a multitude of dependent variables to measure the impact of the COO effect. Product quality[43] and purchase intentions[44] have been the most

[36] Beverland and Lindgreen, 2002; Josiassen et al., 2008; Josiassen and Assaf, 2010
[37] Martin and Cervino, 2011
[38] Ahmed & D'Astous, 2008; Bruning, 1997; Insch & McBride 2004; Kaynak et al., 2000; Papadopoulos et al., 1991
[39] Phau and Suntornnond, 2006; Chiou, 2003
[40] Josiassen et al., 2008; Phau and Suntornnond, 2006; Ahmed & D'Astous, 2008
[41] Jiménez and Martin, 2014; Kabadayi and Lerman, 2011; Michaelis et al, 2008
[42] Arslandere & Er, 2020; Cilingir & Basfirinci, 2014; Ortega-Egea & García-de-Frutos, 2021
[43] Ahmed and d'Astous, 1996; Ahmed et al, 2002; Balestrini and Gamble, 2006; Biswas et al, 2011; Hamin and Elliott, 2006; Insch, 2003; Jian and Guoqun, 2007; Liefeld et al, 1996; Tigli et al, 2010; Wong et al, 2008
[44] Ahmed et al, 2002; Hamin and Elliott, 2006; Jian and Guoqun, 2007; Kim, 2006; Liefeld et al, 1996; Prendergast et al, 2010; Tigli et al, 2010; and Wong et al, 2008

widely used, but purchase value, purchase assessment and brand image[45] have been looked into as well as dependent variables.

Based on what articulated until now, the "purchase intention" is the dependent variable that the research presented above aims at investigating. The variables "perceived quality", "price", and "taste" may be defined as the main independent variables. As suggested from the literature investigated, these are key factors in driving consumers acceptance of Italian Sounding and in influencing their purchase decisions for IS products. Figure 10 depicts the resulting Research Model.

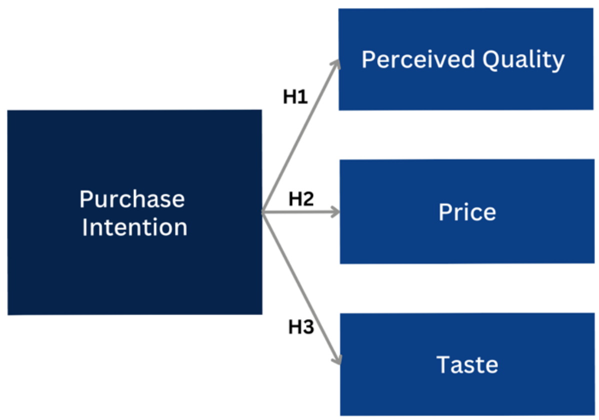

Figure 10: Research Model. Own elaboration

In conclusion, in an industry as competitive as the one being analyzed, and in the presence of a plethora of seemingly Italian companies and brands threatening the reputation of the Italian cuisine in the world, it is important to understand the underlying reasons behind the proliferation of imitations. Identifying the antecedents of consumer buying choices and how they vary according to the country-of-origin effect first and precise extrinsic product cues then, may prove instrumental for firms to re-gain the competitive advantage and market share taken from them by IS and to reaffirm the Made in Italy brand as a synonym of quality. Thus, this study focuses on key antecedents of the acceptance of Italian sounding as a driver for consumers perceptions and purchase decisions to better frame this phenomenon, ultimately fulfilling the gap left by existing literature.

[45] Ahmed and d'Astous, 1996; Liefeld et al, 1996; Han, 2010; (Kim, 2006; Koubaa, 2008

CHAPTER THREE

The first part of this study has set out the framework and background for the following research. This section seeks to close the gaps in the body of prior material by providing answers to the key questions previously posed.
The current research aims at contributing to the existing literature and to add a new facet to the study of consumers perceptions of Italian agrifood goods. Specifically, how these influence buyers' acceptance of imitated products and, as a result, the decision to purchase one category of item over another.

To do so, an analysis was conducted to find out how consumers respond to different situations and contexts. The specifics of the analysis's methodology, key conclusions, and long-term ramifications are covered in the following section.

3.1 Research Methodology

The research process follows the logical ordering laid out in the three research hypotheses. Data collection in this study was conducted through an online survey, tailored and distributed to a pool of grocery shoppers in Dublin, Ireland. Nonetheless, the research is not merely restricted to Irish customers, because of the presence in the largest city of the Republic of Ireland of plenty of nationalities. Out of a wider metropolitan area of 2 million people, with 1.4 million living in County Dublin alone, according to the 2016 census the city is home to nearly 200,000 non-Irish nationals: 22 percent of those employed in Dublin are non-Irish nationals (DublinChamber, n/d). Polish, Romanian, UK nationals, Brazilian, Italian, Spanish and French make up more than half of expats (CSO, 2022). With respect to the research being carried out, this interculturality allows to collect a diverse range of samples and to gain a cross-country and cross-cultural perspective on the subject at stake. The market choice is also justified by Ireland's apparent lack of any food culture. Although the country bills itself as the food island because of its high-quality ingredients (mainly beef and dairy produce), it doesn't seem to have a culture of food based around cooking, the enjoyment of food, and signature dishes that represent it (Healy, 2013). As a matter of fact, international cuisines are growing more and more popular, with Italian being the most faithful favourite in Dublin both according to Google data[46] (Williams, 2020) and to a survey[47] by the Taste of

[46] Chef's Pencil analysed data from Google Trends using AI to categorize search terms for different cuisines and find out how the world's foods ranks on Ireland's palate
[47] Of 1,773 people questioned, the 37% chose Pasta over Pad Thai. The survey found that Italian food was the most popular exotic cuisine for Irish diners

Dublin (TasteOfDublin, 2017). Not surprisingly, the Irish name Buffalo Mozzarella, Cheese, Piemontese beef, and Balsamic Vinegar, among their specialties. Lastly, the presence of the author in the selected area has facilitated this choice.

The questionnaire aims at examining customer perceptions of Italian food products, their knowledge and interest in authentic Italian items, their grocery shopping habits and purchasing intentions for some traditional products, familiarity with the phenomenon of Italian sounding, and finally their willingness to pay more for authentic products.

Consumers (respondents) are targeted with some pre-selected product categories that fall within the most exported Italian agrifood stuffs. Then, they are presented with actual product images from the said food categories that have been previously preselected, this allows for the manipulation of the primary dependent variable (purchase intention) on three different "Italianness degrees": Protected Designation of Origin / Made in Italy, Italian Sounding, and Generic Foreign.

Therefore, a Google survey has been conducted and distributed in Dublin throughout January 2023. It has been divided in three main parts, going from general to specific: the first part identifying respondents' familiarity with Italian food and their related shopping attitudes; the second part containing three statements or food tests about their purchase intentions for the three levels of Italianness; the third identifying respondents' profile. Literature suggests that the questionnaire should be designed in a way that facilitates the dialogue and to build a conversation with the respondent (Ian, 2013) hence, sensitive questions such as personal information should be asked once a relationship has been created with respondents – in the current study demographic questions are placed at the end, in part three. Additionally, questions have been carefully ordered to prevent the "primary effect," i.e., the influence of certain information provided in earlier questions on the response to subsequent questions. With respects to the structure, a funnel strategy was employed – based on the responses provided, different questions will be posed – this method allows to gather solely necessary data and to reach the desired target.

For most questions, the measurement scale adopted was the most common in the literature, that is, the Likert scale (Taherdoost, 2018). Such scale ranges from 1 to 5 points, so to give sufficient discrimination among answers and to make it easy for the final user to understand, and it measures how consumers feel (agree/disagree) about some given attitudes and attributes. For others, a five-points bipolar (i.e., very familiar/very unfamiliar, most likely/most unlikely) semantic differential scale was used.

In terms of the research methodology, the current study makes use of a survey to investigate a contemporary occurrence within its context. In terms of research approach, the study uses explanatory research, that is, research carried out with the aim of analyzing the relationship between variables through hypothesis testing (Cooper & Schindler, 2011), and it falls under the category of quantitative research because it makes use of correlation analysis to determine the sensitivity of respondents to the given attributes and because it uses quantitative methods, namely methods that use a number of samples and numerical data (Creswell & Creswell, 2017).

To measure the acceptance or avoidance of consumers with respect to the IS phenomenon, the three sections presented are aimed at capturing:

1. Variables relating to the perception and evaluation of the product by the interviewee
    a. Attractiveness, estimated by the inclination to buy Italian food
    b. Familiarity, with Italy and Italian food (products, recipes)
    c. Attribution of the country of origin, Made in Italy or not
    d. Perception of quality, in the form of "innate excellence, authenticity, an indefinable attribute" (Pirsig, 1974); (Garvin, 1984).
    e. Adequacy of the price/quality ratio of IS and MI products
    f. Conformity to respondents' tastes of IS and MI products
2. Socio-demographic variables relating to respondents: gender, age, nationality, education (the highest degree obtained), income range; travel habits and travel experiences in Italy.
   These variables were chosen because they are usually considered as the antecedents of the COO constructs. As such, they may be accounted for in the same way for the IS construct and may help in interpreting consumer-related purchasing decisions' influencing factors, and eventually to see what impact (if any) they have on purchase intentions.

For what concerns the food tests, product categories were selected from Lidl' and Tesco's online grocery shopping platforms, which present the exact same offering than physical stores. They turned out to be the best-stocked supermarkets both for luxury and cheap products, plus, they both retail their own generic product line "inspired by" signature products of various countries, mainly Italy, although notoriously produced elsewhere. Lastly, they represent an accessible grocery shopping alternative for most interviewees because of their strong presence globally and in Ireland as well. Such popularity increases the probability that the products shown have already been seen and/or tried by the respondents at least once (Vasel, 2016). Moreover, some other studies and surveys on the subject suggest how the average level of such chains creates a much lower distorting effect on results that that of niche alternatives whose customer base generally seeks the highest quality obtainable and is willing to pay a premium price for food (ICE-NY, 2006); (Tuttle, 2015).

The choice of product groups included in the questionnaire was based on data on agri-food exports and on the relative frequency of imitation in foreign markets, as indicated in chapter one. Among the most vulnerable authentic items to Italian Sounding there are:

- Cheeses, in particular the typical ones: Parmigiano Reggiano and Grana Padano, as often remarked (Romeo, 2015); (Coldiretti, 2015).
- Pasta, both dry and fresh
- Pasta sauces
- Canned tomatoes
- Olive oil
- Balsamic vinegar
- Cured meats and cold cuts, in particular prosciutto crudo (raw ham).

The availability of comparable goods led to the choice of Pasta, Pesto, and Extra-Virgin Olive oil as representative categories. For each group, three different products were chosen: an Italian sounding one, a generic one, and an authentic Made in Italy one:

- for Pasta, the brands chosen were Baresa (G), Roma (IS), and Voiello (MI);
- for Pesto Tesco (G), Baresa (IS)[48], and Filippo Berio (MI);
- Extra Virgin olive oil was represented by Tesco (G), Pompeian (IS), and Monini (MI).

Generic alternatives were included because they are commonly priced the lowest price and do not showcase extreme references to Italy (except for products names). For customers who are either not familiar with MI differential quality or are budget-constrained, these may hold the best price/quality ratio. It should also be noted that the packages of products belonging to the same category were chosen as similar, if not identical, as possible, in order to avoid price distortions (Rundh, 2005). Products selected are showed in Appendix C. In conclusion, survey results will be examined with the statistical tools Excel and SPSS and presented in the next section.

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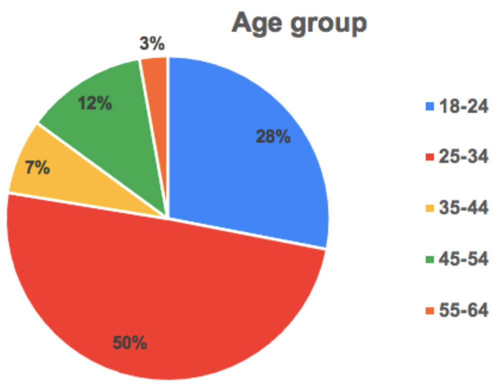
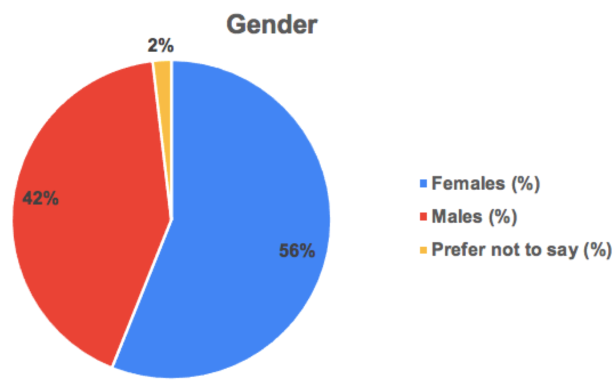
[48] Note how in the case of Pesto, Baresa positions itself in the Italian Sounding area with its "Italiamo" product line, which clearly uses most of the elements of IS items.

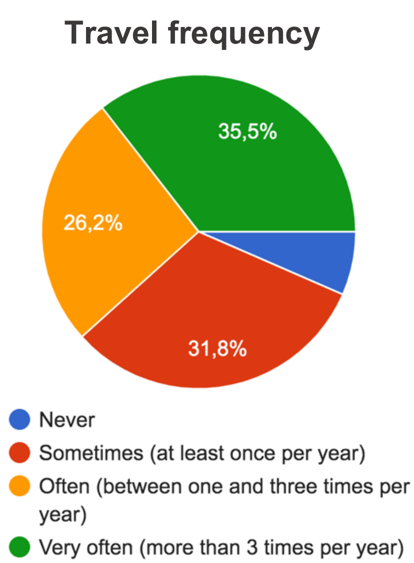
3.2 Results Analysis

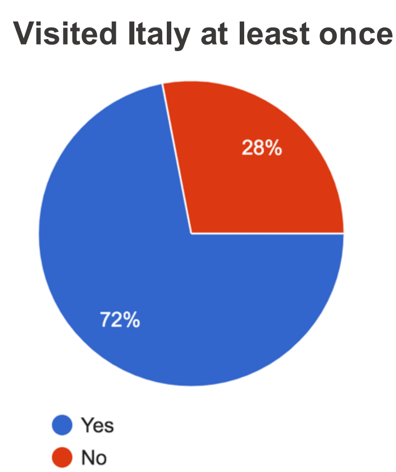
The survey has been filled out by a population of 113 respondents, take from both Irish and Expats in Dublin while grocery shopping. The sample has then been cleaned up by removing incomplete responses. The final sample is made of 107 responses. The range of ages were 28% from 18-24, 50% from 25-34, and 22% from 35-64; of the 107 individuals who provided their gender information, data is equally distributed.





While 31,8% of the individuals who participated in the study travel at least once per year, most of them are regular (26,2%) or frequent (35,5%) travelers. The vast majority of respondents (72%) has been to Italy at least once.





As previously described, the study is aimed at capturing the perceptions and opinions about Italian food and IS goods of non-Italian consumers, consequently, 30 nationalities have been accounted for out of 107 responses. The 14% is constituted by less strongly represented nationalities, the 26% averagely represented ones, while the remaining 60% accounts for the nationalities most reported by respondents, namely, Germany, Ireland, Spain, UK, France, and the U.S. This is consistent with the overview on Dublin's multiculturality scenario provided in section 3.1.

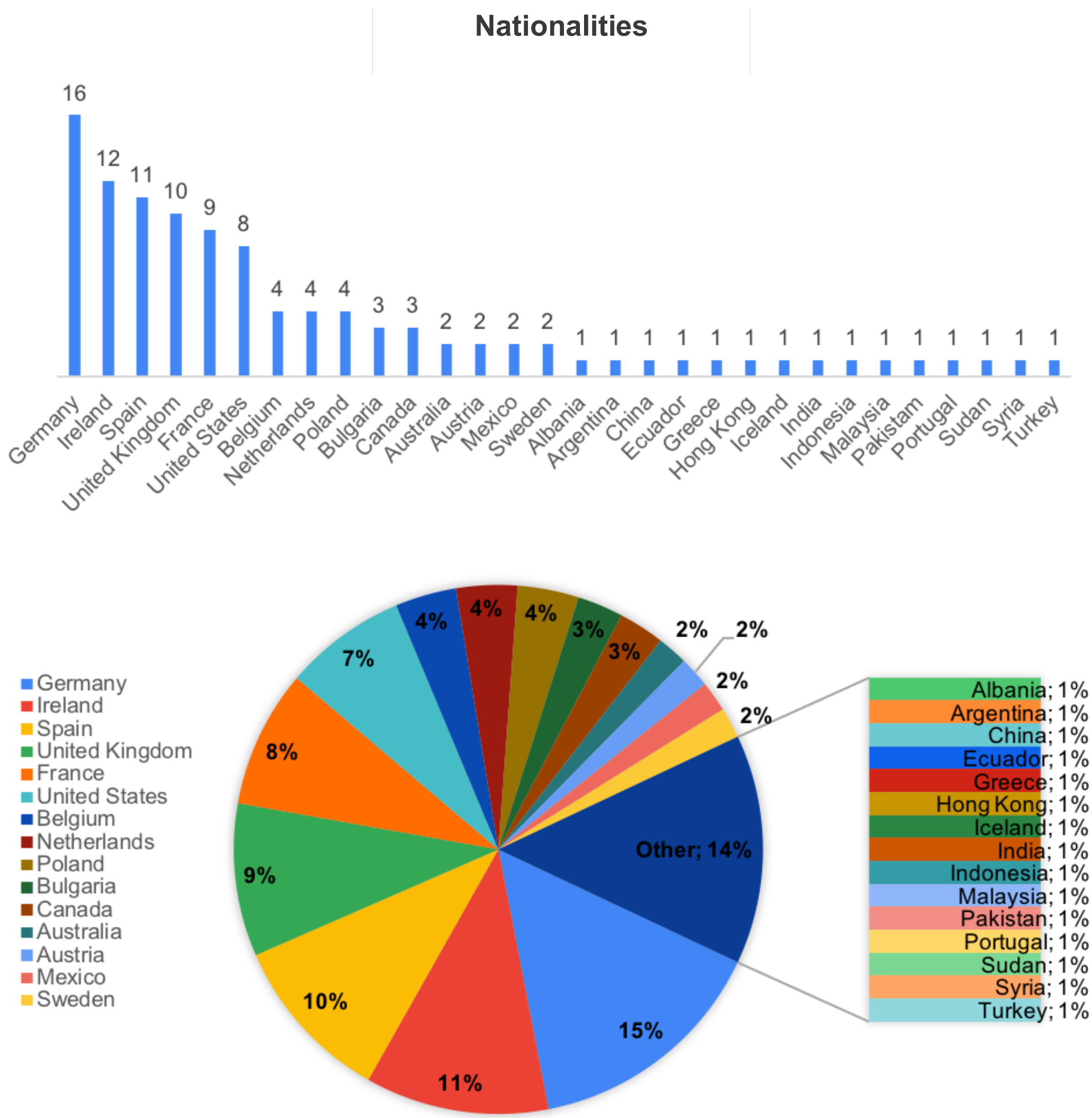


Figure 11: Nationalities of respondents who took part in the study

Several other demographic questions have been posed to respondents in order to account for different moderator, following the main ones outlined in chapter 2 section 5.

- Education level: individuals who obtained a Bachelor's degree and a Master's degree are equally distributed (respectively 41% and 37,4%), and so are the other segments (high school graduates, 14% and Ph.D. or higher, 7%). Only 0,9% didn't graduate high school.
- Employment status: 55% of respondents are full-time employees, while 31% are students, part-time employees, individuals who are seeking for opportunities and those who chose not to disclose such information make up for the residual 14%.
- Income: responses are equally distributed concerning income, 52,3% of respondents state their annual income is below 40K whilst 39,2% is between 40 and 100K; 8,5% of individuals earn an annual income between 100 and 150K or above 150K. Ranges in the survey were chosen according to Dublin's annual income ranges in 2022, with the minimum wage being equal to around 22K, and the average income being between 40 (part-time) and 50K (full-time) per year (CSO, n.d.).

Appendix B displays in details the population's demographic information.

Various statements and queries have been put to the population after having checked their nationality, frequency of travel and whether they had been to Italy or not. For this first analysis, results have been processed using Excel.

According to behavioural and psychological questions, it has first been asked: "What are the first three words that come to your mind when thinking about 'Italian food'? By looking at the word cloud elaborated from individuals' responses, it is clear that the most common answers include both famous Italian raw materials and recipes, such as tomato, parmigiano, guanciale, basil, olive oil, gelato, carbonara, cannoli, pesto, ragu; but also, feelings, emotions, and memories, such as home, family, hearty, lifestyle, enjoyment, care, comfort, amore, love, happiness; other common words instead refer to the attributes of 'Italian food', quality, variety, tradition, excellence, fresh, healthy, tasty, delicious, handmade, wholesome. This first glance at what Italian food means for foreign consumers reveals how an immediate mental association with the country and its resources evokes emotions, a feeling of lifestyle, qualitative features of Italian cuisine as a whole, but it also straightforwardly brings up some well-known products (Figure 12).

Figure 12: Q1. Italian food association by consumers

Consequently, it has been checked whether Italian food products are common or not in foreign consumers' daily diet. As a matter of fact, survey results show that 40% of respondents consume them at least once per week and 60% does so between two times per week and daily (Figure 13).

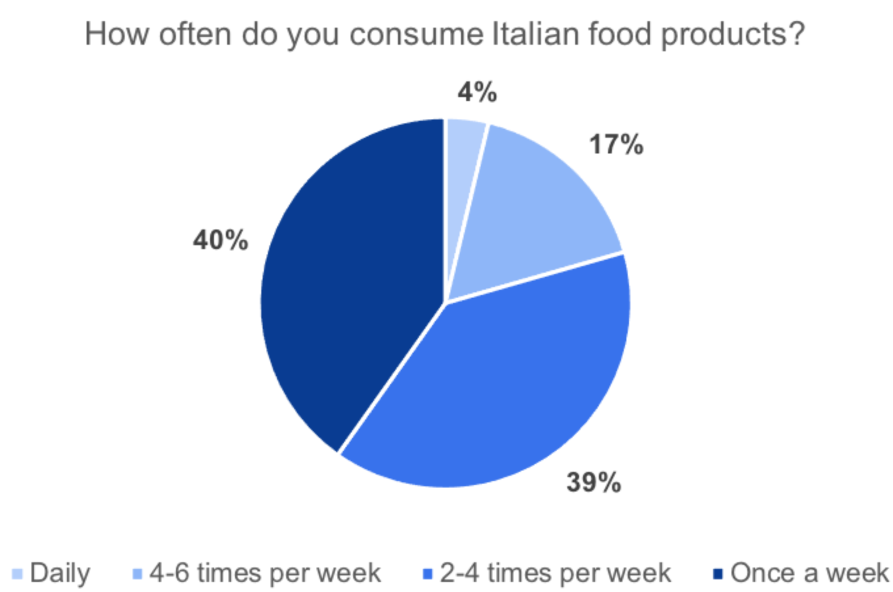


Figure 13: Q2. Frequency of consumer of Italian food products by foreign consumers

By combining the insights gained from these two questions, the survey aimed at assessing why non-Italian consumers choose to buy Italian foodstuff. Responses are in line with the world cloud presented previously: 34% of respondents said they buy Italian products because they match their tastes, 24% state they are driven by their well-known quality, 15% of respondents choose to buy it because of Italy's traditions related to food and 11% because food represents Italy and Italian lifestyle. Some respondents even added that they buy Italian food products "because they are often simpler to cook than others"; "because most Italian dishes focus on fewer ingredients, fresh produce and herb-focused sauces"; "because they are healthy" - Figure 14.

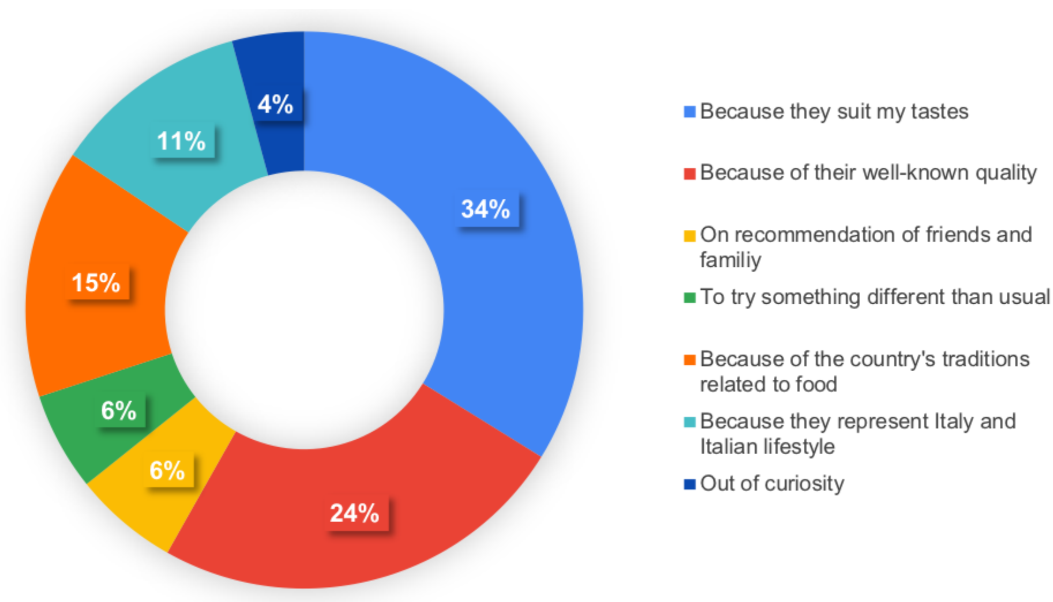


Figure 14: Q3. Reasons behind consumers' buying decision for Italian food products

The survey also shows that Pasta is the item most frequently consumed by foreign buyers: 43% of respondents ranking it as first for frequency of use. Consumers then ranked pasta condiments and sauces (such as pesto, tomato sauce, and others) as the second most frequently consumed among Italian products; dressings (olive oil, balsamic vinegars, Italian dressings) as third; cheeses (parmigiano, pecorino, mozzarella) as fourth; cured meats (salami, prosciutto, mortadella, pepperoni) as fifth; wine as sixth and coffee as seventh. The percentages in the graph shown in figure 15 refer to the number of respondents out of the total 107 that assigned to the item on the y-axis a rank equal to the one shown (Figure 15).

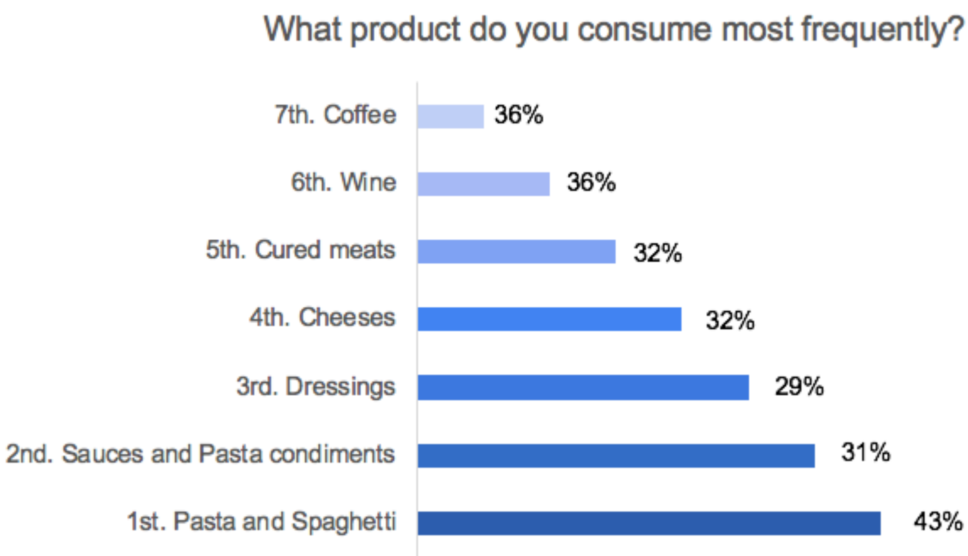


Figure 15: Q4. Rank of most frequently consumed Italian foods by foreign consumers

The first part of the survey then focused on consumers' shopping habits concerning Italian food products. First of all, individuals have been asked whether they recognized Italian food as being a synonym of quality. 92 out of 107 respondents agreed with this statement (86%), while 15 said they don't attribute to it such a value (14%) - Figure 15.

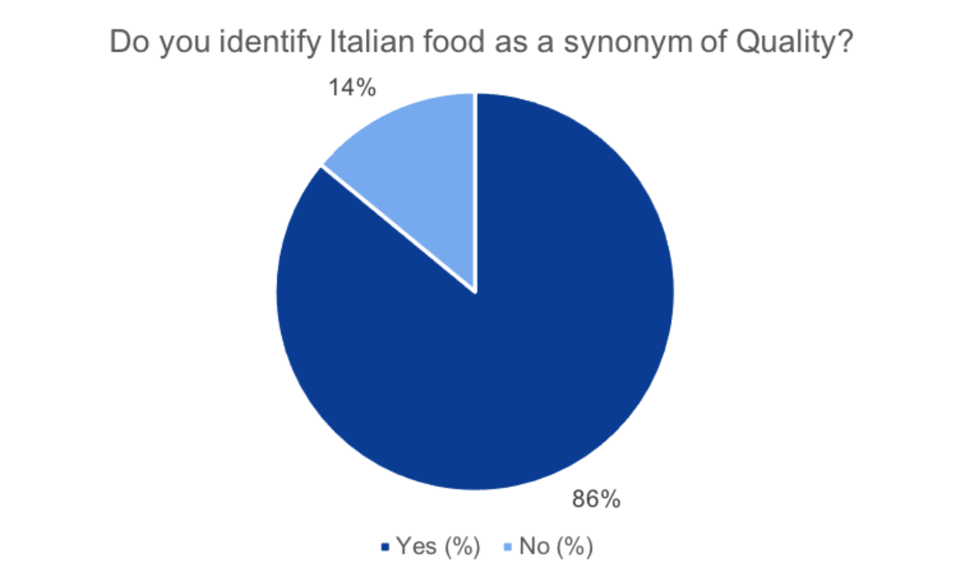


Figure 16: Q5. Foreign consumers associate Italian food with Quality

The following questions tried to uncover the characteristics that foreign consumers take into account when buying Italian goods. Respondents were asked to indicate their level of agreement with each characteristic – high quality, good taste, low price, packaging, brand.

High quality is deemed as an important driver for buying choices by 87% of respondents, while 92,5% considered products' taste as crucial. When it comes to price, responses are less clear: 35,5% of consumers don't think price is a relevant factor to consider when buying Italian food; 37,3% instead said price doesn't represent a driver in their purchase choice. This can easily be explained by the premium price that products marketed as Italian usually enjoy, meaning that consumers who habitually shop for such items are well aware that these are going to more expensive than average products; while, on the other hands, consumers who are not regular buyers for such items may be discouraged by their price. As for packaging, responses are equally distributed: 36,5% of respondents recognized packaging as a driver for choosing Italian goods; for the 30% of individuals is not that important; whilst the remaining 32,7% said products' packaging is not something they care about too much. Lastly, 48% of interviewed individuals look at products' brand while shopping for Italian grocery items, 24,3% maintain the opposite.

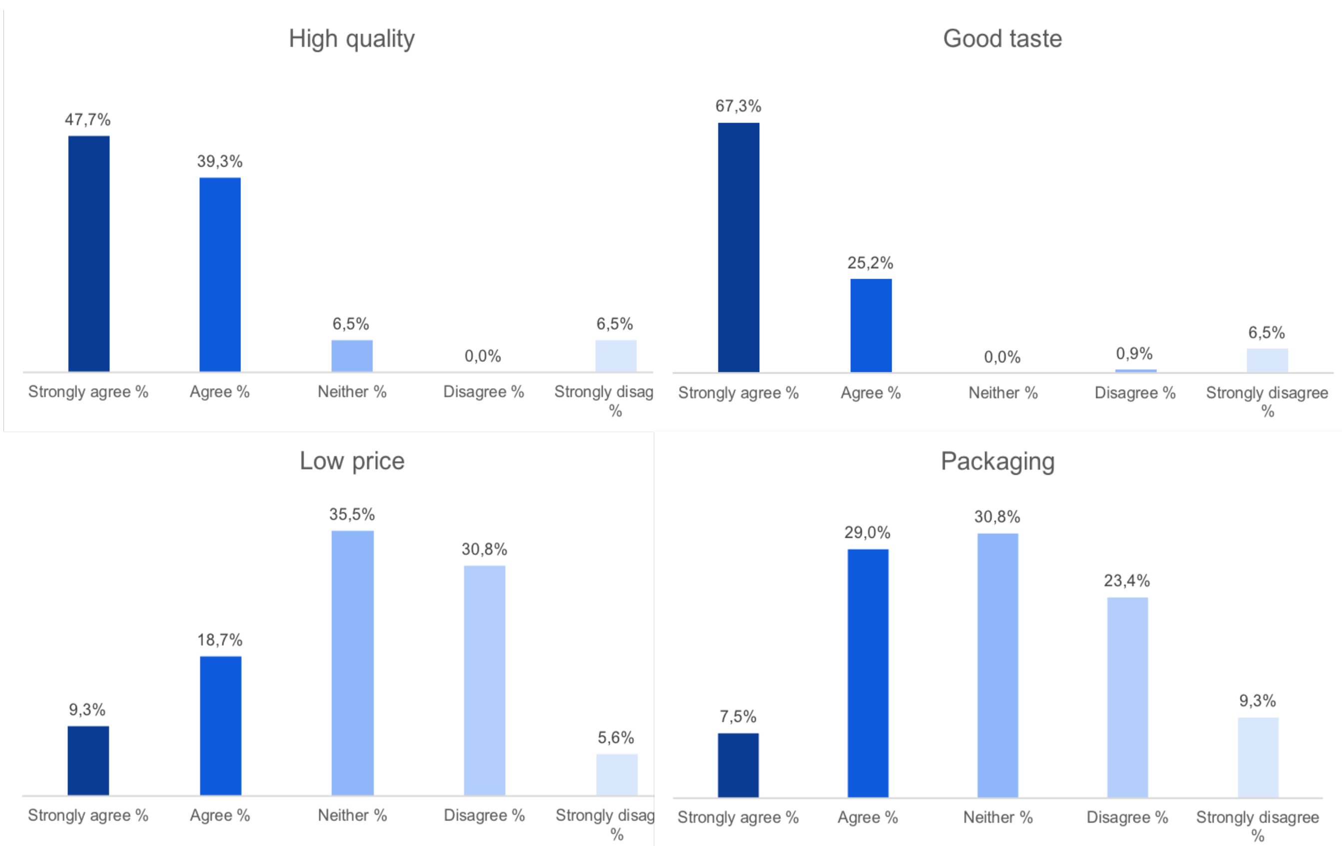
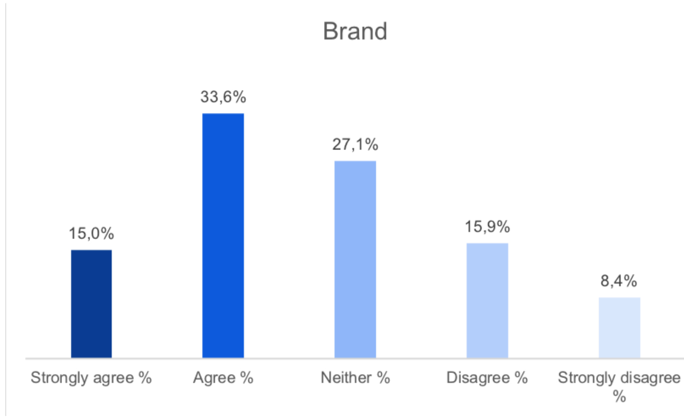


Figure 17: Q6. Drivers for purchase choices of Italian food products: quality, taste, price, packaging, brand



Moving on, 91% of surveyed people claim they are familiar with traditional Italian products and/or recipes. 49 people said this is because they have visited Italy at least once, 50 people said they frequently dine out at Italian restaurants, 39 that they came across them through word of mouth, and 33 through TV shows and advertising. Most people, though, stated that know traditional products and recipes thanks to their own personal knowledge, such as, Italian cookbooks (8), Internet and social media (6), Italian relatives (4), they have lived in Italy (2), they go grocery shopping at the markets in the Italian area of their city (1).

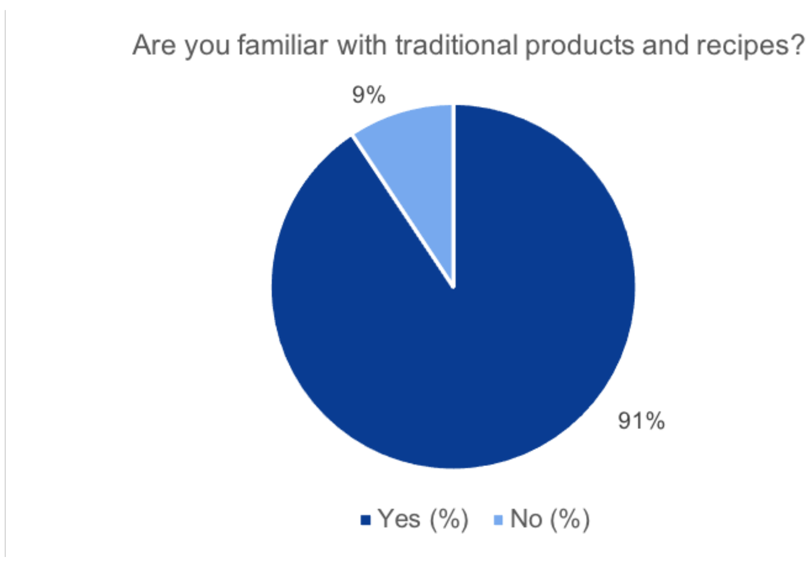


Figure 18: Q7. Foreign consumers claim they are familiar with traditional Italian products and/or recipes

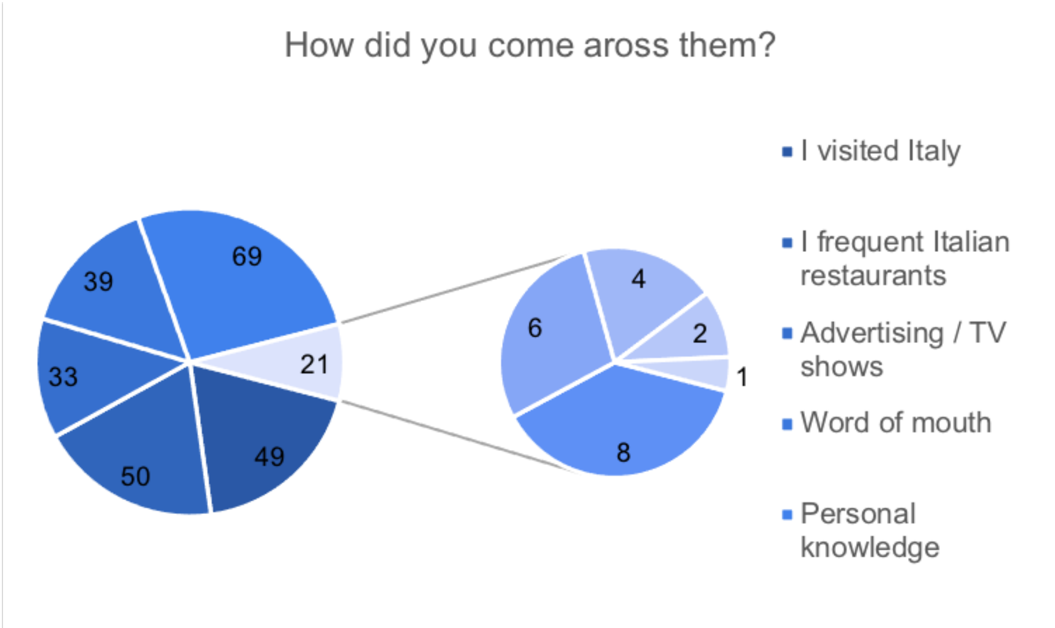


Figure 19: Q8. Reason behind familiarity with traditional Italian products and/or recipes

Subsequently, consumers have been asked about their knowledge and understanding of the constructs of "made in Italy" mark, traditionality, and authenticity.

Although the majority of respondents believe that the mark "made in Italy" on a product expressively means that said product must come from Italy, the nuances of such characterization are not clear in the minds of foreign consumers. As a matter of fact, 52% of individuals state that its meaning is equivalent to "the products was produced by Italian people" (graph 2); 53% believes this means "the product was produced by a brand whose name is Italian" (graph 4); 50% considers the MI mark as an indicator that "raw materials must come from Italy" (graph 5); and 77% that the manufacturing process took place in Italy (graph 6). When it comes to traditionality, respondents are clearly more equally distributed, meaning that consumers are not well aware of the importance of such aspect in differentiating a truly "Made in Italy" product from others. Whilst 42% of respondents agree with the statement that the "Made in Italy" mark means that the product's recipe must be traditional, 30% are not sure about it and 28% even disagree (graph 3). The same holds for the traditionality of manufacturing processes. Even though foreign consumers agreed that the manufacturing process has to be carried out in Italy for a product to be Italian, they failed to recognize the fact that such manufacturing process must also be traditional. Only 28% of respondents agreed with this statement, while 32% neither agreed nor disagreed, and 40% disagreed (graph 7) – Figure 20.

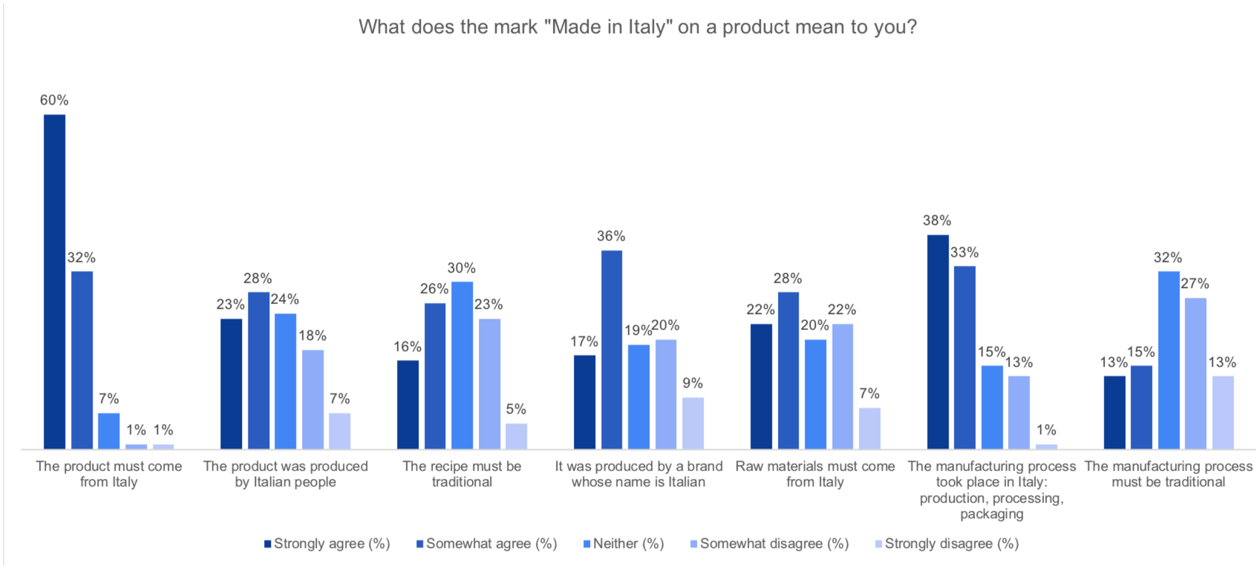


Figure 20: Q9. "Made in Italy" mark association

The following question aimed at analyzing foreign consumers knowledge of Country-of-Origin effects and of Italian Sounding practices. They have been asked about the elements that allow to recognize an authentic Italian product on supermarkets shelves. In order to structure the question, the four categories of imitations examined in chapter 2 have been taken into consideration. Individuals have been asked their level of agreement with 9 statements stemming from “what criteria do you use to verify the authenticity of a product?”, where authenticity has been defined as “original recipe, original product imported from Italy”. Figure 21 shows an overview of respondents’ answers. Results confirm what was anticipated in the above literature review: 83% of respondents indicate their prior knowledge of the product as the main mean to measure products’ authenticity, and 74% indicate the “Made in Italy” mark. Nonetheless, 70% said they rely on products’ name as showcased on packaging (for example, the name mozzarella); 69% look at whether products’ brand is Italian (ex. Barilla); 45% concur that references to Italian cities or landmarks on products’ packaging is an indicator of authenticity; 48% assess authenticity through packaging as a whole; 41% do so thanks to the presence of the Italian flag in particular; 46% through the use of colours and words recalling Italy; 69% said labels such as “product of Italy”, “Italian recipe”, Italian style” are a guide towards products’ authenticity (Figure 21).

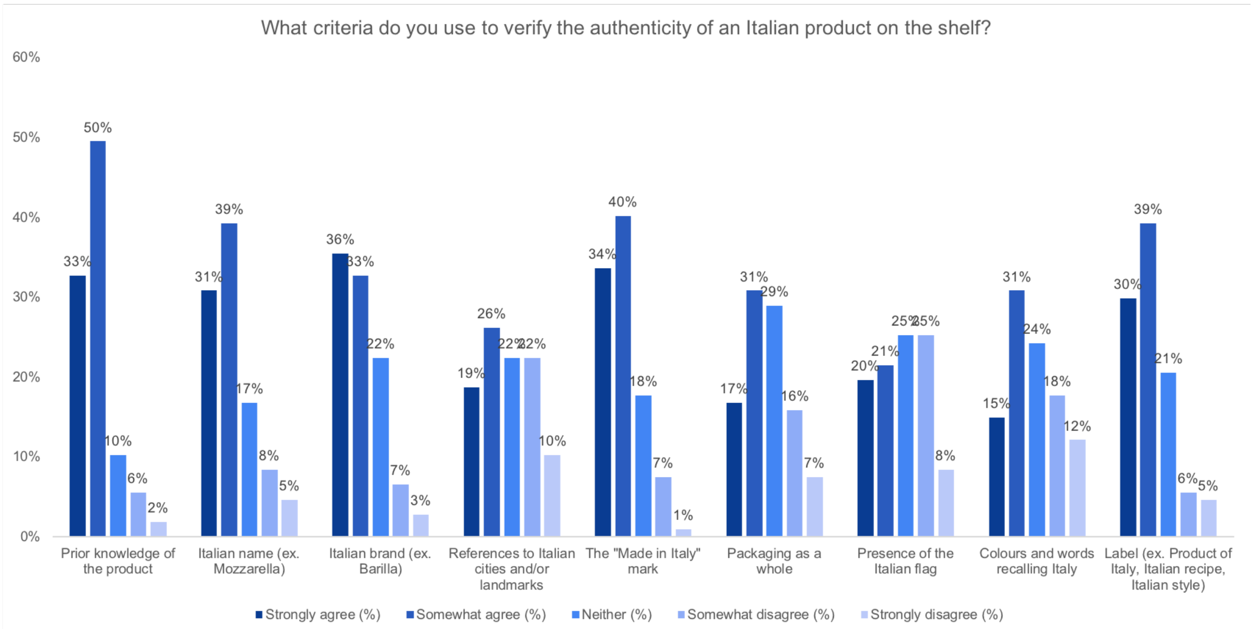


Figure 21: Q10. Product-Authenticity association

The second part of the survey contained some tests: respondents were asked to indicate what item, among three apparently similar alternatives, they would buy. Brand, price, packaging, and quantity were all clearly displayed. Frist and foremost, the question "simply by looking at a product, are you able to distinguish a Made in Italy item from a fake one?" was asked. Results are shown in Figure 22.

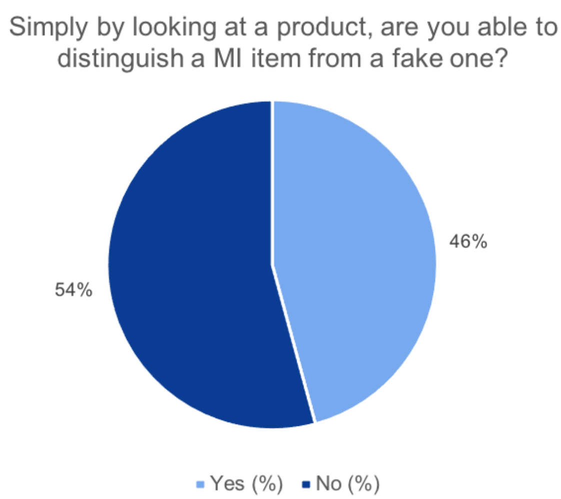


Figure 22: Q11. Foreign consumers ability to distinguish a Made in Italy product from an imitated one

Three categories of products were chosen to run three food tests: Pasta, Pesto, and Extra Virgin Olive Oil. Their choice resulted from the study of the Italian products most sensitive and vulnerable to imitations, and, as such, the most copied ones abroad. Also, their immediate availability in two quite diffused supermarkets chain was taken into consideration in the selection of alternatives. The first alternative presented was a Generic item (G), having little or no reference to Italy and the lowest price; the second alternative was an Italian Sounding product (IS), showcasing some of the imitation practices examined in the study of the literature including a price higher on average than generic goods; the third product was a Made in Italy one (MI), even in this case, references to Italy were minor, but the price resulted to be considerably higher than both IS and G substitute.

In the case of Pasta, the products presented were: Baresa Fusilli 1KG, €1.15 (G); Roma Friss Fusilli 500G, €2.19 (IS); Voiello Fusilli 500G, €2.95. As shows in Figure 23 below, results were approximately equally distributed: 26% of individuals chose the generic item, 39% chose the imitated one, and 35% chose the authentic pasta. Although the imitated product was in fact the most popular within respondents and it was also clearly preferred over the generic one, the majority of foreign consumers did not recognize the Made in Italy product as the best (as a whole, 65% of respondents did not opt for it). This may be in part due to the price difference between IS and MI that was not significant, but also to the fact that the brand of pasta chosen as the Made in Italy item is well-established abroad and enjoys a good reputation on the side of non-Italians. Hence, while some individuals may have considered the MI price/quality ratio as the most favorable, others were attracted by the cheapest alternative, or they were not familiar with Voiello pasta and were thus influenced by the country-of-origin effect enjoyed by the IS packaging.

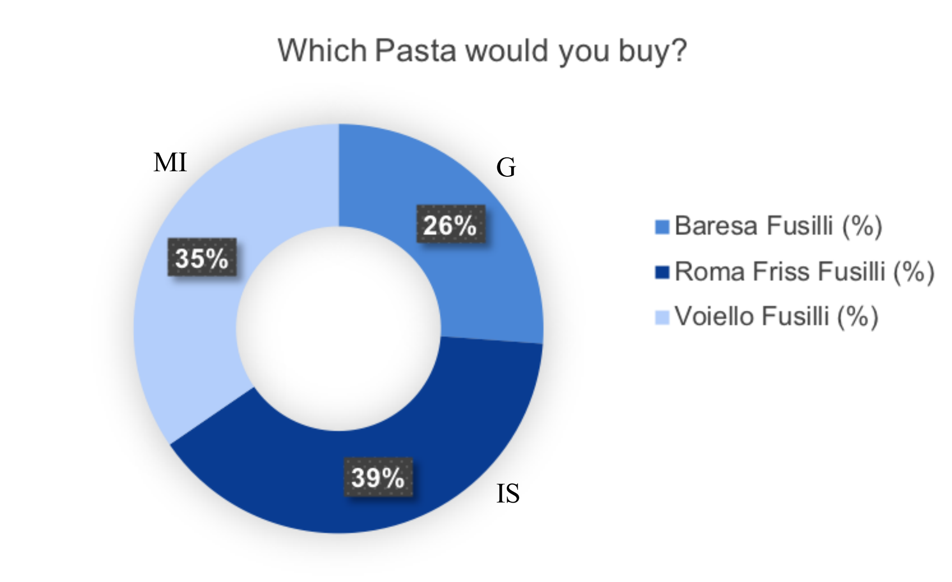


Figure 23: Q12a. Which Pasta would you buy?

For Pesto, the products selected were Tesco Basil Pesto 190G, €1.55 (G); Baresa Pesto Genovese Italiamo 190G, €1.99 (IS); Filippo Berio Classic Green Pesto 190G, €4.19 (MI). Figure 24 shows the results. Contrarily to the previous test, in this case the majority of respondents, namely 57%, would be willing to buy the Italian Sounding product instead of the others (respectively, 11% and 32%). The Made in Italy item selected for pesto is considerably more expensive than both the IS and the G, meaning that it could have bene a discouraging factor for most foreign consumers, particularly if they were not familiar with the brand, budget-constraint, or sensitive to the Italianness showcased by the IS packaging. For budget-constrain consumers, the imitated pesto evidently represents the win-win choice: they obtain an (apparently) Italian product for a convenient price.

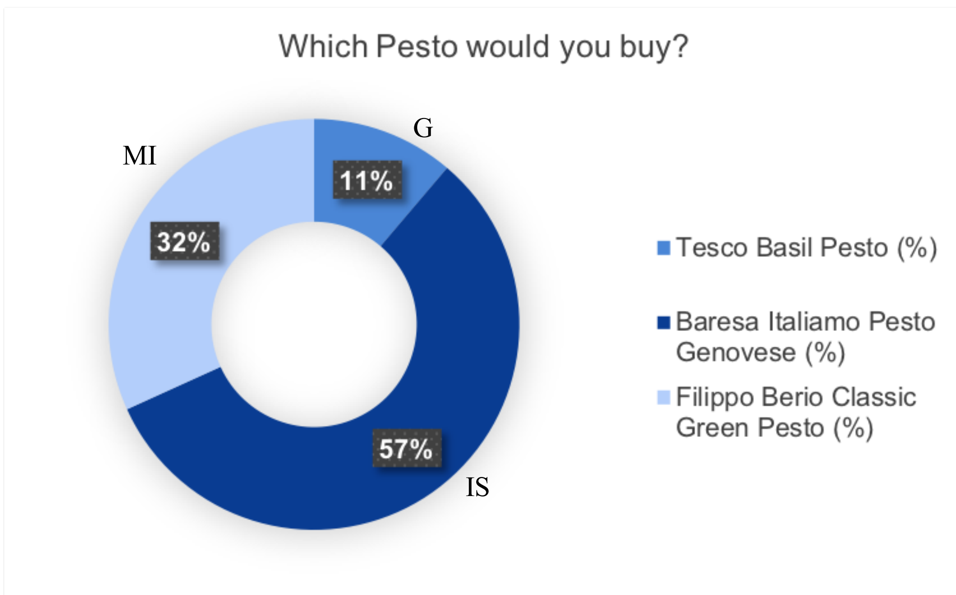


Figure 24: Q12b. Which Pesto would you buy?

Lastly, three Extra Virgin Olive Oil were picked as well: Tesco Extra Virgin Olive Oil 500ml, €2.19 (G); Pompeian Extra Virgin Olive Oil 500ml, €4.49 (IS); Monini Extra Virgin Olive Oil 750ml, €8.85 (MI). the results showed in figure 25 are in line with those of the previous test: 20% of respondents chose the generic extra virgin olive oil; 47% chose the imitated one; 33% chose the Italian authentic extra virgin olive oil. As for the case of pesto, the IS alternative was perceived as the highest-value-for-money, and a good deal to secure a quality produce. Furthermore, for less knowledgeable consumers, the references to Italy profusely exploited on the latter's packaging may have made the trick and convince them that was the top-quality alternative, thanks to Italy's reputation in the field of extra virgin olive oil manufacturing and the country-of-origin effect enjoyed by the fake product.

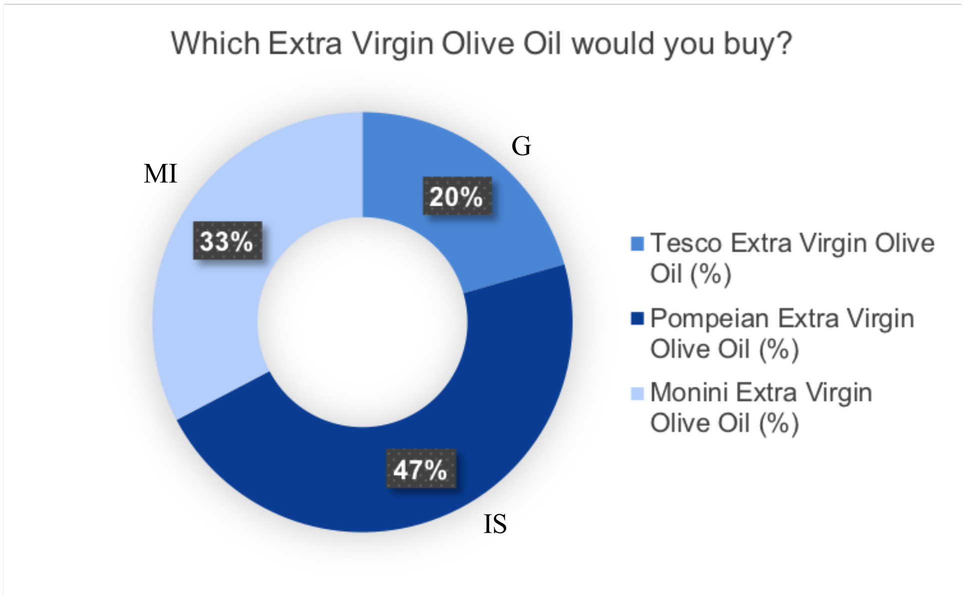


Figure 25: Q12c. Which Extra Virgin Olive Oil would you buy?

Overall, results obtained from the three food tests just described distinctly indicate a strong tendency by foreign consumers to prefer Italian Sounding products over Made in Italy and Generic ones. Aggregate answers (Figure 26) show that 48% of the individuals who took part to the study would rather buy an IS pack of pasta, pesto, or olive oil, having taken into consideration price, quality, and packaging.

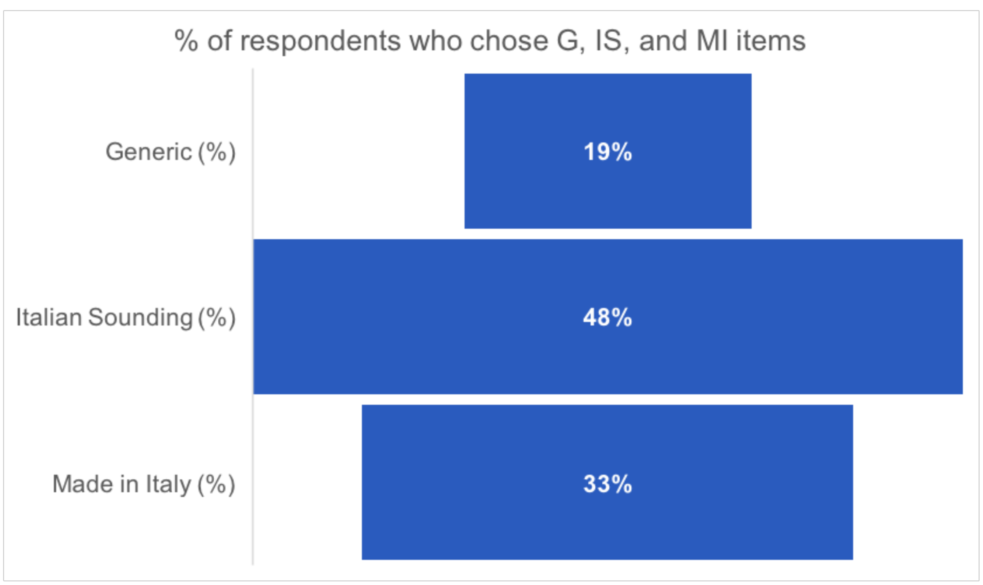


Figure 26: 48% of respondents would buy Italian Sounding products instead of Authentic ones

Henceforth, participants were then revealed about the existence of the IS phenomenon concerning foodstuffs and the products they had just seen, and asked about their degree of knowledge about it.

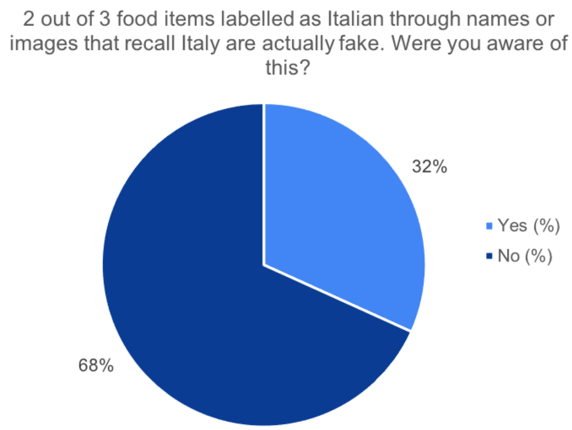


Figure 27: 68% of respondents were not aware of the existence of the IS phenomenon

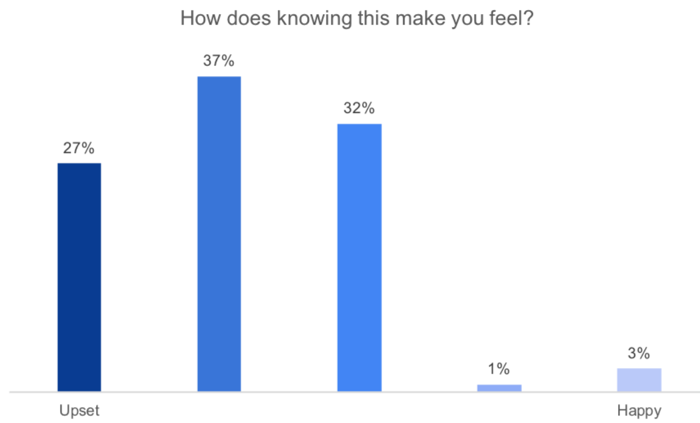


Figure 27: Q13. How does knowing about it make you feel?

Lastly, the survey questioned foreign consumers on their willingness to pay for authentic Italian food products. When asked to share their degree of agreement with the sentence "I am willing to pay a higher price for authentic Italian food as a premium for quality, traditional manufacturing processes and recipes, and shipping costs", 77% of respondents said they agreed or strongly agreed, while only 13% did not. Among the share of foreign consumers that would be willing to pay a higher price to make sure they obtained a true, authentic product, most of them said an increase of 20-40% would be the best suit their intentions.

Figure 29: 77% of respondents said they would be willing to pay a higher price for an authentic Made in Italy product

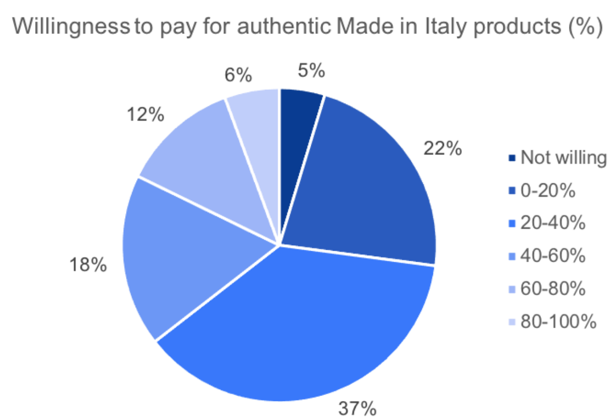


Figure 29: Q15. Willingness to Pay for authentic Made in Italy products

3.2.1 Detected Variables Analysis

As it has been pointed out in section 3.1, in order to qualify the acceptance or avoidance of Italian Sounding goods by foreign consumers, the survey's aim was to capture, additionally, a number of variables related to the perception and evaluation of the presented products by interviewees, as a proxy of their perception and evaluation of both MI and IS.

For this analysis, the statistical tool IBM SPSS 28.0 was used to examine collected data. For the most part, the command SPLIT FILE was used because it allows to designate one or more variable as the grouping one and to then examine the data file into separate groups based on the values of the grouping variable. The output is reported for each split group individually.

a. Variable **Attractiveness** was included to measure the appeal exerted by Italian products *overall* for foreign consumers. Mean and standard deviation were computed, where label "1" represents respondents who stated they perceive Italian food as attractive as a whole, and "0" those who see Italian food simply as something to buy to break their routine or out of curiosity if they stumble upon it while grocery shopping. The mean value equal to 0,94 gives a quick summary of the results, meaning that, overall, respondents tend to agree with the first definition of *attractiveness.* The standard deviation equal to 0,23 indicates a fairly precise measure – the closer the standard deviation is to 0, the closer the data points observed are to the mean value (if all data point were equal to the mean, there would be zero deviation). Both statistics are confirmed by the frequencies table.

Descriptive	N	Min	Max	Mean	σ
Attractiveness	107	0	1	**0,94**	**0,231**
# Valid cases (listwise)	107				

Frequencies		Frequency	%	Valid %	Cumulative %
Valid	Maybe	6	5,6	5,6	5,6
	Yes	**101**	**94,4**	94,4	100,0
	Total	107	100,0	100,0	

Table 1: Variable Attractiveness: Descriptive statistics and Frequencies

b. Variable **Familiarity** was meant to understand how familiar foreign consumers are with Italian food and with traditional dishes and products. Respondents' answers to the Food Tests were grouped according to the degree of familiarity *expressed* by consumers, to measure their *actual* familiarity. Out of 107 valid answers, only 10 said they are not familiar with food nor recipes from Italy, and their answers to the food tests are coherent, as for each product they mostly choose either the G or the IS alternative. For what concerns the 97 respondents who said their degree of familiarity is high, surprisingly enough their food choices did not reflect their statement: with the exception of pasta, for both Pesto and Olive Oil they selected the fake or generic products. This means that, although the 90% of respondents believe they know enough to consider themselves familiar with Italian food and recipes, their degree of knowledge is actually much lower.

Familiarity			PI(Pasta)	PI(Pesto)	PI(Extra Virgin Olive Oil)
No	N	Valid	10	10	10
Yes	N	Valid	97	97	97

Purchase Intention for Pasta / Familiarity

			Frequency	%	Valid %	Cumulative %
No	Valid	MI	2	20,0	20,0	20,0
		IS	2	20,0	20,0	40,0
		G	6	60,0	60,0	100,0
		Total	10	100,0	100,0	
Yes	Valid	MI	40	41,2	41,2	41,2
		IS	35	36,1	36,1	77,3
		G	22	22,7	22,7	100,0
		Total	97	100,0	100,0	

Purchase Intention for Pesto / Familiarity

			Frequency	%	Valid %	Cumulative %
No	Valid	MI	2	20,0	20,0	20,0
		IS	7	70,0	70,0	90,0
		G	1	10,0	10,0	100,0
		Total	10	100,0	100,0	
Yes	Valid	MI	32	33,0	33,0	33,0
		IS	54	55,7	55,7	88,7
		G	11	11,3	11,3	100,0
		Total	97	100,0	100,0	

Purchase Intention for Extra Virgin Olive Oil / Familiarity

			Frequency	%	Valid %	Cumulative %
No	Valid	MI	3	30,0	30,0	30,0
		IS	5	50,0	50,0	80,0
		G	2	20,0	20,0	100,0

		Total	10	100,0	100,0	
Yes	Valid	MI	32	33,0	33,0	33,0
		IS	45	46,4	46,4	79,4
		G	20	20,6	20,6	100,0
		Total	97	100,0	100,0	

Table 2: Purchase Intention for degree of Familiarity

c. **Attribution of the country of origin** as a variable was included to understand whether non-Italian consumers are able to recognize a Made in Italy from a Generic and Italian Sounding product. Answers to the food test have been grouped according to consumers ability to determine products' authenticity. 58 respondents said they would not be able to recognize an authentic item from a copied one, while 49 think they would. By looking at the split view below, it is seen as in the case of Pasta this is confirmed: consumers who cannot distinguish between authentic and fake goods in fact selected IS or G alternatives (69%); the opposite is true, as well. For Pesto, instead, both categories of consumers chose the Sounding products; for Olive Oil, the pattern continues for consumers who are not able to identify authenticity, as they chose again IS, while the choices made by the second group are equally distributed between MI and IS. This pattern would suggest a larger propensity of the interviewees to identify Generic and Sounding products as Italian compared to MI, as the former (combined) are erroneously attributed an Italian origin with double frequency than authentic ones.

Ability to identify authenticity			PI(Pasta)	PI(Pesto)	PI(Extra Virgin Olive oil)
No	N	Valid	58	58	58
Yes	N	Valid	49	49	49

Purchase Intention for Pasta / Attribution COO

			Frequency	%	Valid %	Cumulative %
No	Valid	MI	18	31,0	31,0	31,0
		IS	20	34,5	34,5	65,5
		G	20	34,5	34,5	100,0
		Total	58	100,0	100,0	
Yes	Valid	MI	24	49,0	49,0	49,0
		IS	17	34,7	34,7	83,7
		G	8	16,3	16,3	100,0
		Total	49	100,0	100,0	

Purchase Intention for Pesto / Attribution COO

			Frequency	%	Valid %	Cumulative %

			Frequency	%	Valid %	Cumulative %
No	Valid	MI	18	31,0	31,0	31,0
		IS	32	55,2	55,2	86,2
		G	8	13,8	13,8	100,0
		Total	58	100,0	100,0	
Yes	Valid	MI	16	32,7	32,7	32,7
		IS	29	59,2	59,2	91,8
		G	4	8,2	8,2	100,0
		Total	49	100,0	100,0	

Purchase Intention for Extra Virgin Olive Oil / Attribution COO

			Frequency	%	Valid %	Cumulative %
No	Valid	MI	14	24,1	24,1	24,1
		IS	30	51,7	51,7	75,9
		G	14	24,1	24,1	100,0
		Total	58	100,0	100,0	
Yes	Valid	MI	21	42,9	42,9	42,9
		IS	20	40,8	40,8	83,7
		G	8	16,3	16,3	100,0
		Total	49	100,0	100,0	

Table 3: Purchase Intention for Attribution of the Country of Origin

d. Variable **Quality Perception** aims at capturing whether respondents identify Italian food as a synonym of quality, hence, they have a favourable quality-wise perception of products coming from Italy. Mean and standard deviation have been computed, where the max value "1" refers to respondents with a positive Italian food/Quality association, and "0" to a negative association. The mean is equal to 0,86 meaning that, overall, respondents tend to hold a high and positive perception of Italian food. A standard deviation equal to 0,35 indicates again a relatively precise measure and a low variability in observed data. Both statistics are confirmed by the frequencies table below.

Descriptive	N	Min	Max	Mean	σ
Quality	107	0	1	**0,86**	**0,349**
# Valid cases (listwise)	107				

Frequencies		Frequency	%	Valid %	Cumulative %
Valid	No	15	14,0	14,0	14,0
	Yes	**92**	**86,0**	86,0	100,0
	Total	107	100,0	100,0	

Table 4: Variable Quality perception: Descriptive Statistics and Frequencies

e. Variable **Adequacy of the price/quality ratio** of IS and MI products through Price was added to understand whether the P/Q ratio of typical Italian products is adequate for foreign consumers and a driver for their purchase. Food tests answers have been grouped according to consumers level of agreement with the suggestion that they buy typical Italian food because of its "low price". Most consumers were neutral or didn't agree with this statement. In fact, the majority of these consumers would rather buy IS or G products instead of MI because of their lower prices. While this is especially true for this category of consumers, those who initially indicated low price as a driver of buying intention, still tended to prefer IS products. In both cases, this may be because, with equal perceived quality (as all products look Italian and have Italian names), IS perceived P/Q ratio is the most advantageous to obtain a high-quality item for the lowest price.

Low Price			PI(Pasta)	PI(Pesto)	PI(Extra Virgin Olive Oil)
Agree	N	Valid	20	20	20
Disagree	N	Valid	33	33	33
Neutral	N	Valid	38	38	38
Strongly agree	N	Valid	10	10	10
Strongly disagree	N	Valid	6	6	6

Purchase Intention for Pasta / Price adequacy

			Frequency	%	Valid %	Cumulative %
Agree	Valid	MI	8	40,0	40,0	40,0
		IS	3	15,0	15,0	55,0
		G	9	45,0	45,0	100,0
		Total	20	100,0	100,0	
Disagree	Valid	MI	14	42,4	42,4	42,4
		IS	16	48,5	48,5	90,9
		G	3	9,1	9,1	100,0
		Total	33	100,0	100,0	
Neither agree nor disagree	Valid	MI	17	44,7	44,7	44,7
		IS	12	31,6	31,6	76,3
		G	9	23,7	23,7	100,0
		Total	38	100,0	100,0	
Strongly agree	Valid	MI	1	10,0	10,0	10,0
		IS	2	20,0	20,0	30,0
		G	7	70,0	70,0	100,0
		Total	10	100,0	100,0	
Strongly disagree	Valid	MI	2	33,3	33,3	33,3

		IS	4	66,7	66,7	100,0
		Total	6	100,0	100,0	

Purchase Intention for Pesto / Price adequacy

			Frequency	%	Valid %	Cumulative %
Agree	Valid	MI	6	30,0	30,0	30,0
		IS	11	55,0	55,0	85,0
		G	3	15,0	15,0	100,0
		Total	20	100,0	100,0	
Disagree	Valid	MI	10	30,3	30,3	30,3
		IS	21	63,6	63,6	93,9
		G	2	6,1	6,1	100,0
		Total	33	100,0	100,0	
Neutral	Valid	MI	15	39,5	39,5	39,5
		IS	21	55,3	55,3	94,7
		G	2	5,3	5,3	100,0
		Total	38	100,0	100,0	
Strongly agree	Valid	MI	1	10,0	10,0	10,0
		IS	4	40,0	40,0	50,0
		G	5	50,0	50,0	100,0
		Total	10	100,0	100,0	
Strongly disagree	Valid	MI	2	33,3	33,3	33,3
		IS	4	66,7	66,7	100,0
		Total	6	100,0	100,0	

Purchase Intention for Extra Virgin Olive Oil / Price adequacy

			Frequency	%	Valid %	Cumulative %
Agree	Valid	MI	6	30,0	30,0	30,0
		IS	9	45,0	45,0	75,0
		G	5	25,0	25,0	100,0
		Total	20	100,0	100,0	
Disagree	Valid	MI	9	27,3	27,3	27,3
		IS	18	54,5	54,5	81,8
		G	6	18,2	18,2	100,0
		Total	33	100,0	100,0	
Neutral	Valid	MI	17	44,7	44,7	44,7
		IS	16	42,1	42,1	86,8
		G	5	13,2	13,2	100,0

		Total	38	100,0	100,0	
Strongly agree	Valid	MI	1	10,0	10,0	10,0
		IS	3	30,0	30,0	40,0
		G	6	60,0	60,0	100,0
		Total	10	100,0	100,0	
Strongly disagree	Valid	MI	2	33,3	33,3	33,3
		IS	4	66,7	66,7	100,0
		Total	6	100,0	100,0	

Table 5: Purchase Intention for Price Adequacy

f. **Conformity of Italian goods to foreigners' tastes**. This variable was measured by means of individuals' opinions on the presented products' Taste. Answers to Food Tests have been grouped according to respondents' level of agreement with the suggestion that they buy Italian products because of taste. At first glance, almost all respondents agreed, to different degrees, with this statement (92,5 %). However, when looking at their choices in the food tests, the majority of them actually preferred the Sounding item (except for pasta, where also the Generic one was selected). On the contrary, individuals for which Taste is not the main driver of purchase intention, were more propense to buy Made in Italy products.

Taste			PI(Pasta)	PI(Pesto)	PI(Extra Virgin Olive Oil)
Agree	N	Valid	27	27	27
Disagree	N	Valid	1	1	1
Strongly agree	N	Valid	72	72	72
Strongly disagree	N	Valid	7	7	7

Purchase Intention for Pasta / Taste conformity

			Frequency	%	Valid %	Cumulative %
Agree	Valid	MI	10	37,0	37,0	37,0
		IS	6	22,2	22,2	59,3
		G	11	40,7	40,7	100,0
		Total	27	100,0	100,0	
Disagree	Valid	MI	1	100,0	100,0	100,0
Strongly agree	Valid	MI	26	36,1	36,1	36,1
		IS	30	41,7	41,7	77,8
		G	16	22,2	22,2	100,0
		Total	72	100,0	100,0	

Strongly disagree	Valid	MI	5	71,4	71,4	71,4
		IS	1	14,3	14,3	85,7
		G	1	14,3	14,3	100,0
		Total	7	100,0	100,0	

Purchase Intention for Pesto / Taste conformity

			Frequency	%	Valid %	Cumulative %
Agree	Valid	MI	4	14,8	14,8	14,8
		IS	18	66,7	66,7	81,5
		G	5	18,5	18,5	100,0
		Total	27	100,0	100,0	
Disagree	Valid	MI	1	100,0	100,0	100,0
Strongly agree	Valid	MI	25	34,7	34,7	34,7
		IS	40	55,6	55,6	90,3
		G	7	9,7	9,7	100,0
		Total	72	100,0	100,0	
Strongly disagree	Valid	MI	4	57,1	57,1	57,1
		IS	3	42,9	42,9	100,0
		Total	7	100,0	100,0	

Purchase Intention for Extra Virgin Olive Oil / Taste conformity

			Frequency	%	Valid %	Cumulative %
Agree	Valid	MI	7	25,9	25,9	25,9
		IS	15	55,6	55,6	81,5
		G	5	18,5	18,5	100,0
		Total	27	100,0	100,0	
Disagree	Valid	MI	1	100,0	100,0	100,0
Strongly agree	Valid	MI	24	33,3	33,3	33,3
		IS	33	45,8	45,8	79,2
		G	15	20,8	20,8	100,0
		Total	72	100,0	100,0	
Strongly disagree	Valid	MI	3	42,9	42,9	42,9
		IS	2	28,6	28,6	71,4
		G	2	28,6	28,6	100,0
		Total	7	100,0	100,0	

Table 6: Purchase Intention for Taste Conformity

3.2.2 Correlation Analysis

In order to testify the reliability of the data collected and to identify possible patterns in the answers given by respondents, a correlation analysis between some specific questions has been carried out.

In the data collection stage, respondents' preferences for a carefully selection of bundles were measured, this analytical technique has then been adopted in order to finally give a precise answer to the hypothesis identified in the research framework above. Correlations have been computed through IBM SPSS 28.0. In each table, significant estimates, with p-value between 0.01-0.05, will be marked with one asterisk, and extremely significant ones, with p-value lower than 0.01, with two. The aim of this analysis is to add value to the results obtain from the analysis on the detected variables just discussed and eventually to help give a clear answer to the research hypotheses.

A correlation has been computed among the Purchase Intention as the dependent variable and Perceived Quality, Price, and Taste as the independent variables. Results are shown in the following tables.

Table 7: Correlation between Perceived Quality and Purchase Intention for IS

		PQ	PI IS Pasta	PI IS Pesto	PI IS Olive Oil
PQ	Pearson Correlation	1	,129	,207*	,108
	Sign. (two-tail)		,184	,032	,270
	N	107	107	107	107
PI IS Pasta	Pearson Correlation	,129	1	,378**	,395**
	Sign. (two-tail)	,184		<,001	<,001
	N	107	107	107	107
PI IS Pesto	Pearson Correlation	,207*	,378**	1	,215*
	Sign. (two-tail)	,032	<,001		,026
	N	107	107	107	107
PI IS Olive Oil	Pearson Correlation	,108	,395**	,215*	1
	Sign. (two-tail)	,270	<,001	,026	
	N	107	107	107	107

Table 8: Correlation between Price and Purchase Intention for MI

		Price	PI MI Pasta	PI MI Pesto	PI MI Olive Oil
Price	Pearson Correlation	1	-,206*	-,234*	-,246*
	Sign. (two-tail)		,033	,015	,011
	N	107	107	107	107
PI MI Pasta	Pearson Correlation	-,206*	1	,378**	,395**

	Sign. (two-tail)	,033		<,001	<,001
	N	107	107	107	107
PI MI Pesto	Pearson Correlation	-,234*	,378**	1	,215*
	Sign. (two-tail)	,015	<,001		,026
	N	107	107	107	107
PI MI Olive Oil	Pearson Correlation	-,246*	,395**	,215*	1
	Sign. (two-tail)	,011	<,001	,026	
	N	107	107	107	107

Table 9: Correlation between Taste and Purchase Intention for IS

		Taste	PI IS Pasta	PI IS Pesto	PI IS Olive Oil
Taste	Pearson Correlation	1	,176	,191*	,051
	Sign. (two-tail)		,070	,048	,064
	N	107	107	107	107
PI IS Pasta	Pearson Correlation	,176	1	,378**	,395**
	Sign. (two-tail)	,070		<,001	<,001
	N	107	107	107	107
PI IS Pesto	Pearson Correlation	,191*	,378**	1	,215*
	Sign. (two-tail)	,048	<,001		,026
	N	107	107	107	107
PI IS Olive Oil	Pearson Correlation	,051	,395**	,215*	1
	Sign. (two-tail)	,604	<,001	,026	
	N	107	107	107	107

3.3 Discussion

The accuracy of the data was thoroughly examined in the previous section's reliability and correlation analysis of the survey results. The research's core questions will now be addressed with the help of applicable findings. The current section will therefore discuss the results as well as outline any managerial implication that can be made as a consequence. The limitations of this study and the gaps that need to be filled by future research will be covered in the final section.

3.3.1 Results Discussion

The analysis presented in the previous section allows to draw some interesting consideration on the subjects being studied. The variables selected were the result of precise considerations made on the in-depth study of the available literature. Subsequently, correlations outcomes will also be reviewed to add value to the conclusions reached on the research hypotheses.

Different arguments will now be made that support the idea that not all purchase decisions are the outcome of a rational process, rather, other factors are often influential drivers of consumers' purchase intention. Overall, what transpires is a quite contradictory scenario.

First of all, it is clear that Italian food does exert a strong **appeal** on international buyers. By looking at the words cloud (Figure 12), it is reasonable to state that such attraction generates from the affective component of Italy as an image, besides of its cognitive component[49]. This, coherently with findings of existing research [Fournier (1998); Pratesi (2001); Anselmi (2011)], refers to the emotional and symbolic meanings that Italian food carries for people abroad, and to the sense of belonging to the country that these chase by adopting its culinary culture, to live the Italian lifestyle. Study's findings on foreigners' degree of **familiarity** with Italian products and recipes are also in line with the literature (Paliaga & Oliva, 2013; Kaynak & Cavusgil, 1983; Vianelly & Pegan, 2914). On one side, people claim a high degree of familiarity with Italy, this means consumers tend to have a more favourable perception of its products and a higher propensity to use the country image as an extrinsic cue to evaluate them. On the other side, the analysis on this variable revealed that the degree of familiarity that foreign consumers believe to have with typical Italian food items and recipes is, in fact, much lower, confirming the theory for which the less is known about a product, the more the information about the manufacturing or origin country impacts on consumers perception. This explains why, in the majority of cases, consumers were influenced by the references to Italy they could immediately see on IS products' packaging. Furthermore, consumers are not aware of the difference between country of origin, manufacturing, and design (see Figure 20) so they will interpret whatever visible country name as the manufacturing one and will trust it.

With regards to this, a pattern is observed on the **ability of non-Italian consumers to recognize Made in Italy** from Generic and Italian Sounding products[50]. This suggests a larger propensity by foreign consumers to identify Generic and Sounding products as Italian compared to MI, as the former (combined) are erroneously attributed an Italian origin with double frequency than authentic ones. This

[49] Affective: home, family, hearty, lifestyle, enjoyment, care, comfort, amore, love, happiness. Cognitive: quality, variety, tradition, excellence, fresh, healthy, tasty, delicious, handmade, wholesome.
[50] Attribution of the Country of Origin

reflects the studies examined previously on the impact of the COO for low-involvement purchases: consumers rely on extrinsic cues available on products' packaging to attribute the COO and, in turn, to assess quality. For consumers with high levels of product-country knowledge, as for the sample being studied, trust in one's self previous knowledge is even stronger. In this context, elements of the four forms of imitations become the main driver for purchase intention.

Speaking of **Perceived Quality**, Italian food is commonly associated with high quality by international consumers. This attribute is supposedly their main driver behind purchase intention, although results seem to confirm the theory for which such consumers are not able to detect qualitative differences between authentic Italian and fakes. Consequently, they are led to choose the sounding product based on factors other than quality (as resulted in Cembalo, 2008), particularly when actual quality cannot be judged (that is, prior to purchase). In this circumstance, as seen in the literature, other cues such as brand, packaging, country image, familiarity with the product are what build consumers' quality perception. As a matter of fact, the graph in Figure 21 shows how respondents rely on product names, brand, packaging, such as Italian cities or landmarks, Italian flag, colors, words, and labels such as "product of Italy", "Italian recipe", Italian style". Actually, similar labels are attributed a larger added value than the label "Made in Italy".

The correlation between perceived quality and purchase intention for IS products is in fact positive (Table 7). There is a (weak) positive correlation between PQ and PI for fake pasta and for fake olive oil, and a stronger significant correlation between PQ and PI for fake pesto, meaning that, as perceived quality for fake products increases, the intention to buy them also increases. Furthermore, a strong significant correlation was found among the purchase intentions expressed by consumers for all three items. This indicates that people who tend to purchase IS for any given product category, tend to do so for other products as well, as long as the perceived quality is positive. It can hence be concluded that *visual and identity components greatly impact how well people perceive any given good* and, on the basis of a *perceived superior quality*, *purchase intention for Italian Sounding goods increases*.

> Hypothesis 1 - Perceived Quality is positively related with Purchase Intention for Italian Sounding products – is confirmed.

Results related to the **adequacy of the Price/Quality ratio** of MI and IS is consistent with findings by Cembalo (2008), Ballarini & Petroni (2008), and De Pin (2008). In the decision-making process, once consumers whose perception of Italy is positive, as for the sample of this study, are faced with a series of packaging displaying elements related to said country, they immediately project their positive country image on products. As they are now led to evaluate all products as of equal quality, price becomes the differentiating element that drives their purchase intention. From the survey, it also results that most foreign consumers do not have gustatory tools sophisticated enough to judge the actual quality of Made in Italy products; hence, they don't attribute to them a qualitative superiority such as to justify their premium price. Lastly, it can be concluded that, according to the interviewed sample, the price/quality ratio of MI items is not adequate, rather that of IS items is more advantageous. As a matter of fact, the correlation between the independent variable Price and the Purchase Intention for Made in Italy products is significantly negative (Table 8). For all three product categories, the negative correlation is quite strong and significant. The highest negative correlation is recorded for Pesto, where the price of MI pesto is more than twice the price of its IS equivalent and almost three times that of G pesto. This might be the case because, despite being one of those typical artisanal products re-designed in an industrial key, the international community still perceives it as being too distinctive for the use they could make of it. In this context, *the role of price is found to be decisive in the preference of one product over another*.

> Hypothesis 2 – Price is negatively related with Purchase Intention for Made in Italy products – is confirmed.

Results reached on the **conformity of Italian products to the Tastes of foreign consumers** show a two-way pattern. Apparently, foreigners buy Italian food because of its taste, however, the majority of them is actually buying products whose taste is not Italian, rather, it is purposely adjusted to reflect the preferences of buyers in international markets. This result is consistent with the point made in the discussion on Taste Effects in section 2.4.2, plus it confirms the outcome reached by Cembalo (2008), according to whom foreigners are prone to prefer IS to MI because it is closer to local palates. Here, the MI is not top of the class. For the product categories investigated, Italian products are surpassed in value procured to consumers by their IS counterparts. In accordance with findings by Magagnoli (2013), the choice for Sounding items over authentic ones is partly due to the differences between palates: although aware of quality differences, and regardless of price, *consumers simply prefer IS because it is adapted to their tastes*. This theory is confirmed by the correlation analysis carried out between the independent variable Taste and consumers' Purchase Intention for IS products which turns out to be positive (Table 9)[51]. This means that the more fake products match international buyers' expectations, the more they are willing to buy them.

> Hypothesis 3 – Taste is positively related with Purchase Intention for Italian Sounding products – is confirmed.

[51] Even in this case, a stronger correlation is observed for Pesto, while a weaker one is seen for Olive Oil.

3.3.2 Managerial Implications

The current study supports the significance of perceived quality, price, and taste in customers purchase decisions for Italian food, as resulted by the literature. Practically speaking, businesses should focus on improving overall perceptions of product quality and finding price points that match consumers' willingness to pay, without neglecting the observation on tastes by foreigners and their palates. This goes beyond simply considering customer satisfaction.

From a managerial point of view, the study's findings led not only to a clearer vision of the context of imitations in the Made in Italy agrifood industry and of consumers perceptions of Italian food, above all, it can be helpful for companies operating in the sector to understand how much consumers are linked to this facet. Furthermore, it enables them to put plans into place in this respect to satisfy customer preferences in international markets, as these were the specific subjects of this study. Therefore, it is clear that in order to increase export strategies, improve the recognition of Made in Italy abroad, and define business models that allow to uncover new market opportunities, the need to take into consideration customer opinions is evident and foreign ones cannot be ignored. Transparent and straightforward communication, associated with education programs addressed to international consumers, may be instrumental to reduce information asymmetries and promote Made in Italy for its inherent quality and taste. Some similar initiatives have already been successfully out in place by Eataly and Rana's restaurants-kitchen-showcase. For what concerns DOC based in Italy businesses, collaborating with expatriate ones is a move that should be supported, as long as the positive perception of Made in Italy is preserved.

Furthermore, according to the findings, because the Made in Italy industry is constantly expanding and offering numerous stimuli from both an academic and managerial standpoint, it is crucial for businesses to take country of origin effects into account as a differentiating factor in shaping consumers' perceptions and use this aspect to their advantage. An investigation of these antecedents would be of practical significance for managers and allow them to increase a target-group and segment-oriented approach.

Therefore, a logical proposition based on the findings is expanding national and regional brands. This could be a valid approach to spread traditional recipes and promote Italianness in the world, so to favourably influence customer behaviour and, particularly for those who have little affinity for Italy as a nation and little knowledge about its traditions and culinary specialties.

Finally, more study should be done on this topic, taking into account the suggested improvements discussed in this paper. Extending the geographical distribution of responders is of particular relevance, especially as consumption is shifting more and more towards international cultures and global markets.

3.3.3 Limitations and Future Research

The research described in the preceding chapters made an effort to fill the vacuum in the body of knowledge regarding customer perceptions and acceptance of imitation practices in the food industry.

All the components described in the conceptual framework were examined in order to find answers to the identified problems. Despite the many insights that arise from this analysis, the study does have certain limitations, which will need to be looked into more thoroughly in the future. Nonetheless, the research questions were reasonable, and the resulting data reliable and responses valid. Overall, the sample size is enough to obtain statistically significant results, but certain relatively imbalanced distributions suggest a limited representativeness with respect to the reference population, reflecting the limitations of the distribution method.

A second limitation is found in the age distribution of the interviewees. Even though the survey was open to all age groups, most of the subjects between 18 and 34 have been reached. Therefore, to obtain more accurate results, future analyses should ensure equal attention to each age group. This gap can be filled in the future by studying, for instance, how the perception of older generations has changed over the years, with the affirmation of internet and the subsequent globalization. This would also consider in more detail different backgrounds and whether customers typically considered "laggards" of innovation benefitted from it in this context.

Another limitation that emerges when looking at the paper's findings and the discussion that followed, is related to the independent variables. The outcome suggest that the reference target may not have fully understood these elements, bringing out the need to develop further studies to more thoroughly explore this phenomenon from numerous angles. Increased investigation on the antecedents of country-of-origin effects and related perceptions may be of practical significance especially from a managerial point of view. It would appear fair to incorporate them as part of future studies, particularly in regard to respondents who have a high level of country and product knowledge, for whom the purchase intention is connected with the relevant image to a lesser extent.

In its nature as trailblazer explorative research, the current study aimed at adding to the limited literature available and at paving the way for future researches to enhance and freshen up results reached on the topic at stake, as its logic is still not fully grasped.

CONCLUSIONS

The present research was aimed at identifying the elements that influence consumers' perceptions of Italian food and that draw them to buy fake products instead of authentic ones. Furthermore, the objective of this study was to provide empirical evidence that buying decisions may not always be the result of careful consideration in each and every purchase. The extensive literature on the antecedents of the effects of product-country mental associations has allowed for a thorough understanding of the various factors that contribute to customer perceptions, particularly in a social-psychological view, and their implications on purchase intentions. However, literature does not specifically address the issue of the Italian Sounding phenomenon (and of country-of-origin effects with Italy as the image country) and of its antecedents, in the same way as extensive implications on the Italian eno-grastronomical industry are lacking.

The literature, nevertheless, has shown how crucial consumers' opinions are to businesses in the food industry and how marketing strategies should exploit them to brighten the line between true Italian food products and imitations and fight against Italian Sounding practices. This can also be made using technology – this trend has been accelerated as a result of the covid-19 pandemic, which has opened up the possibility to SMEs to export local products simply online. This fashion is likely to continue in the future, as more and more businesses, no matter their size, recognize the untapped potential residing in global markets and consumers. This aspect is even more vital in a sector as competitive as the agrifood one, where market share is essentially tied to costs and prices. Therefore, consumers-related issues are expected to be given significant attention, as every company's decision revolves around them. However, not enough studies have looked into the role of consumers in this specific sector.

The goal of this study, indeed, was to close this gap by exploring the potential drivers, purposes, and factors that contribute to bogus Italian food market appeal, from the point of view of international consumers. Consequently, the research question revolves around the rationality behind consumers' choices for Made in Italy versus Sounding products. Three research hypotheses were developed to identify the drivers of purchase intention for imitate products, respectively, perceived quality, price, and taste.

The analyses carried out resulted in element Price having the strongest impact on purchase intention for Italian products, but a positive effect was observed also for Perceived Quality and element Taste. This conclusion is accompanied by a series of other factors that contribute to a quite contradictory scenario, where misconceptions are the masters. International consumers believe they buy Italian food because of its quality, but when confronted with a selection of different product categories, they end up attributing an

Italian origin to a generic or fake product twice as often as they do to authentic products. They think they are buying Italian food because of the country' culinary traditions, however, they don't attribute much value to a product that has been processed following a traditional manufacturing process or recipe. They are often influenced by brands' name and products' packaging more than by the label "Made in Italy". Lastly, non-Italian consumers prefer Sounding products because they are closer to their palates and, whether budget constraint or not, price becomes the clincher in guiding their purchase intention towards false Italian. Thanks to aggressive but accessible price ranges, difficult to match by Italian SMEs, the Sounding industry attracts also knowledgeable consumers. This is consistent with the idea that, in the global food market, distinction derives from what a brand's or product's origin is perceived to be, and not the actual location of a company's production.

In the circumstance just described, it may be argued that the Italian Sounding phenomenon effectively harms Made in Italy, not only from an economic point of view, as often remarked, but in that it weakens the global presence of the brand and the perception of Italianness abroad, by promoting goods that do not respect Italian standards for quality and craftmanship, nor the traditions of the Bel Paese.

Hence, Made in Italy appears to be in a subordinate position compared to Italian Sounding. Since its origins are quite frequently confused for Italian, this distorting effect seems to be strong enough to induce the consumer to perceive an added value such as to make the cheaper alternative 100%Sounding appear more attractive than the more expensive 100%Italian one. In fact, the latter is not recognized a higher degree of Italianness, allowing the former to enjoy a greater COO effect, as well as greater perceived quality and taste. This result openly coincides with the belief shared by many according to which the large sales volumes of this unfair competitor are the result of a "value-generating combo" devised by exploiting the reputation of the Italian agro-food sector, without having to bear the costs of production and transport.

The significant confusion detected in discerning Italian from Sounding seems to invoke a more direct and transparent communication. However, the epilogues found for some Italian products that have been undervalued compared to their counterparts, suggest that the fragility of Made in Italy is not merely a matter of recognizability and unfairly exploited COO impact. In fact, although the "Single Trademark" solution fiercely promoted by Farinetti (Eataly) could facilitate recognition of the origin for consumers, this potential COO effect may not necessarily be able to please foreign consumers with the 100% Italian product. After all, the latter don't care whether food comes from the Bel Paese when this does not meet their expectations of "international" quality and taste, or if the very high typically Italian quality is totally irrelevant, misunderstood, or excessive compared to the use they could put it to. For this to be genuinely effective, communication and consumer education initiatives that decrease information and cultural asymmetries and position the fundamental qualities of taste and actual quality at the core of such food-Italy associations cannot be ignored.

Solutions are offered by the experience of Eataly and the restaurant-kitchen-showcase of Rana. Tastings, promotions, demonstrations: in order to market the fruits of the Italian land and culture, it is in fact necessary to encourage people to taste and exhibit the product within an Italian context, simulating a trip to the Bel Paese. Furthermore, some sort of co-marketing between DOC Italian businesses and expatriate ones is not a move to discard, as long as it does not lead to a perception reduction of the uniqueness of Made in Italy.

Today the label “Made in Italy” encompasses a selection of goods and services for which Italy is clearly recognized for its high standards of excellence, originality, and design. These shape how the world views Italian culture and way of life and encourage differentiation tactics based on the "uniqueness" of Italian cuisine. Spreading the authenticity, recognizability, and reliability of the place of origin factor, thus, is critical to preserve the respectable reputation of the Italian agri-food industry and, ultimately, fuel its export potential and drive its competitive advantage.

In conclusion, the objectives set were met, as testified by the insights provided so far. Nevertheless, the study also seeks to add to the corpus of knowledge existing on the topic and offer suggestions for further researches.

APPENDIX A

Summary of the studies analyzed in the literature review about the effects of IS variables on perceived quality.

Variables	Effects detected	Authors
Brand & perceived quality	Strong positive two-way relationships between brand and COO: well-known brands increase consumers' evaluation of their country; positive perception of a country increases quality perception of a brand's products	Marino & Mainolfi, 2009; Diamantopoulos et al.,2011; Aaker, 1991; Johansson & Nebenzahl, 1986; Nebenzahl & Jaffe, 1996; Thankor & Katsanis, 1997; Pappu et al., 2007.
Packaging (attributes such as colours, images, wording, labeling) & perceived quality	Packaging attributes positively influence consumers' perception of products. This effect is stronger if actual quality cannot be judged	Bilkey & Ness, 1982; Verlegh & Steenkamp, 1999; Cembalo, 2008; Hsee, 2008; Rani, 2014; Underwood at al., 200; Samiee, 2010; Raheem, 2014; Ares & Deliza, 2010; Etzi, et al., 2022; S.T. Wang, 2012.
Product type, characteristics, and categories & perceived quality	The COO effect on consumers' evaluation of products is positive: consumers rely on their perception of products' country to infer quality.	Schaefer, 1966; Olson & Jacoby, 1972; Huber & McCann, 1982 Bilkey & Ness, 1982; Han & Terpstra, 1988; Agarwal & Sikri, 1996; Insch, 2003; Pecher & Tregear, 2000; Schupp & Gillespie, 2001; Mannecke et al., 2007.
Consumer Involvement & COO	For low-involvement purchases, consumers rely on the COO to judge quality. Trust in the COO is even higher for consumers showing high levels of product-country knowledge	Chryssochoidis et al, 2007; Speece & Nguye, 2005; Ahmed et al., 2004; Martin & Eroglu, 1993; Neese & Taylor, 1994.

Familiarity & COO	Consumers show a greater propensity to evaluate a product using the image of its country in cases of low or non-familiarity with it or its brand	Schaefer, 1966; Erikson, Johansson & Chao, 1984; Kaynak & Cavusgil, 1983; Paliaga & Oliva, 2013.
Country's characteristics and development & COO	Economic, political, cultural, and social factors, influence the intention of foreign consumers to buy a country's products, regardless of quality	Schooler, 1965 and 1971; Tongberg, 1972; Gaedeke, 1973; Hampton, 1977; Wang & Lamb, 1983.
Income level, education, social class, age & COO	High level of income and education are associated with an increasing preference for foreign products, while the latter decreases with increasing age	Shimp & Sharma, 1987; Han, 1988; Richardson Jr, 2012; Wall & Heslop, 1986; Nijssen & Douglas, 2004; Bozell-Gallup, 1996; Heslpo et al 1998; Laroche at al., 2003
Gender & COO	The incidence of gender over attitude toward foreign products is unclear.	Anderson & Cunningham, 1972; Usunier, 1994; Usunier, 2002; Kelin & Morris, 1996; Wall & Heslop, 1986
Patriotism and ethnocentrism & COO	Some consumers exhibit a tendency to evaluate more favorably domestic goods over imports despite of actual quality. Ethnocentrism and patriotism are often associated with other socio-demographic characteristics (age, gender, income, etc.) and country dev	Han, 1988; Balabanis & Diamantopoulus, 2004; Nagashima, 1970; Bennister & Saunders, 1978; Kaynak & Cavusgil, 1983; Wang & Lamb, 1983; Agbonifoh & Elimimian, 1999

APPENDIX B

The appendix B depicts the complete overview of the surveys and calculations conducted.

N = 107

Gender	Females	60	56%
	Males	45	42%
	Prefer not to say	2	2%
Age	18-24	30	28%
	25-34	53	50%
	35-44	8	7%
	45-54	13	12%
	55-64	3	3%
Nationality	Germany	16	15%
	Ireland	12	11%
	Spain	11	10%
	United Kingdom	10	9%
	France	9	8%
	United States	8	7%
	Belgium	4	4%
	Netherlands	4	4%
	Poland	4	4%
	Bulgaria	3	3%
	Canada	3	3%
	Others (2x) Australia, Austria, Mexico, Sweden	8	8%
	Others (11) Albania, Argentina, China, Ecuador, Greece, Hong Kong, Iceland, India, Indonesia, Malaysia, Pakistan, Portugal, Sudan, Syria, Turkey	15	14%
Education	Some high school	1	0,9%
	High school graduate	15	14%
	Bachelor’s degree	44	41,1%
	Master’s degree	40	27,4%

	Ph.D. or higher	7	6,5%
Employment status	Employed full time Employed part time Seeking opportunities Student Prefer not to say	59 8 4 33 3	55,1% 7,5% 3,7% 30,8% 2,8%
Annual income	Less than €25.000 €25.000 - €40.000 €40.000 - €70.000 €70.000 - €100.000 €100.000 - €150.000 More than €150.000	30 26 21 21 6 3	28% 24,3% 19,6% 19,6% 5,6% 2,8%
Travel frequency (x year)	Never Sometimes (at least once per year) Often (between one and three times per year) Very often (more than 3 times per year)	7 34 28 38	8,5% 31,8% 26,2% 35,5%
Visited Italy	Yes No	77 30	72% 28%

APPENDIX C

The appendix C shows the products selected for the Food Tests distributed to respondents as part of the study’s survey.

1. Pasta

2. Pesto

3. Extra Virgin Olive Oil

Department
of Economics and Management
- Major in International Management

Chair of Advanced Marketing Management

The antecedents of Italian Sounding: An empirical study on the perception of Italian food by foreign consumers.

Prof. Mazzù Marco Francesco
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Academic Year 2021/2022

SUMMARY

ABSTRACT

This is the tale of Made in Italy agri-food on foreign markets: victim of unfair competition, plundered by about 80 billion euros per year, pushed back in its aspiration to export, and unprotected by uniform legislation. Known as Italian Sounding, this practice lies in exploiting commercial features related to Italy to market non-Italian products and allude to a highly esteemed provenance globally.

In such a fast-pacing and competitive world, the need of addressed solutions to improve the recognition of Made in Italy abroad, strengthen export strategies, and discover new market prospects is becoming a compelling one. To do so, consumers' opinion cannot be disregarded, particularly international ones.

As a matter of fact, the study of the country-of-origin phenomenon and of its effect on buyers' behaviour is one of the most relevant and extensively researched in contemporary marketing and a vital business component for companies in the Italian agrifood industry.

The following study aims at finding the antecedents of country-of-origin effects and consumers' perceptions in the food industry, focusing on Italy and Made in Italy exports. This factor has not already been highlighted by the present literature, giving the possibility to undertake further research. Besides, the study will also investigate the social-psychological component related to these product-country associations to assess the extent to which perceptions influence customers in buying Italian food items.

A sample of 107 participants has been selected to analyze purchase intentions for the above-mentioned characteristics, and the drivers behind purchase intentions in the food industry were identified.

Key Words: Purchase Intention; Italian Sounding; Country of Origin; Perceptions; Italy; Food Industry.

Paper Type: Research Paper

INTRODUCTION

Known as Italian Sounding (IS), the dark side of Made in Italy food is worth 120 billion euros per year. This practice takes the form of using commercial elements recalling Italy on non-Italian products to allude to a highly renowned provenance around the world. Today, two out of three Italian agri-food products sold internationally are imitations. The IS is based on a well-known construct, namely the Country-Of-Origin effect, and is believed to be an anti-competitive practice both towards consumers and Italian producers. The objective of this research is to shed light on the ramification and scope of the Sounding phenomenon and its impact on the positioning of Made in Italy abroad. The first chapter will present a detailed overview of the Italian agri-food sector, focusing on the Made in Italy as a brand, together with consumer and demand trends. The following chapter will examine the roots of the IS phenomenon and the COO effect, through an in-depth analysis of the existing literature. Therefore, a gap will be found in available literature about the antecedents and acceptance of this particular phenomenon which will bring to the development of three research hypotheses, presented in chapter three. A survey conducted on 107 consumers from 30 nationalities will assist in filling in the discovered gap. In conclusion, considering the literature review and the research framework developed, possible solutions and managerial implications will be discussed, together with the study's limitations and future researches.

INDUSTRY OVERVIEW

Made in Italy is recognized throughout the world as a synonym of exclusivity, prestige, and quality. When it comes to the agri-food sector, it is further associated with quality foods from the Mediterranean diet, national specialities, produce typical of the territory. Geography, climate, tradition, culture, innovation, taste, these all come together to create unique products of a unique brand. The Italian agri-food chain represents one of the pillars of the competitiveness of Made in Italy in the world. Today, MI is recognized as a reputable brand, ranking third in surveys for brand awareness, behind Coca-Cola and Visa. This result can be attributed to the country's artistic and artisanal history, and to the intrinsic values associated to Made in Italy food – high quality and know-how. Conversely, these factors led to the rise of IS which induces buyers into purchasing fake products by dressing them with Italian clothes. Most importantly, it damages the Italian industrial fabric, made up for the 92% of SMEs with limited resources to compete with foreign markets. The Italian agri-food chain is worth over 570 billion euros in turnover and, as such, is the leading economic sector, employing about the 17% of total workforce. Italian excellence is confirmed by the highest number (314) of products registered as denomination of origin and geographical indication in the EU.

Made in Italy is made up of "*all those products capable of recalling the concept of Italianità"* (i.e., Italianness) and thanks to the deep connection that typical products hold with their territory of origin, Italy enjoys a superior country-of-origin effect. This means that the positive opinion generally attributed to Italy is projected onto its products which, in turn, are perceived positively by international consumers. Internationally, the wording *Made in Italy* represents much more than a mere indication of origin: these three words add value to any product labeled as such, to which the foreign consumer automatically associates some key characteristics, such as excellence of raw materials and processing, know-how, good taste, "dolce vita", just to name a few. For many, consuming Italian food is a way to feel closer to the country's culture and lifestyle. Accordingly, Italian agri-food exports have been thriving – about a fifth of the total production is destined to foreign markets and the 2021 market a record equal to more than 50,1 billion euros, with 42,3 billion deriving from the food and beverage sector, evidence of its global appreciation. Italy is the first exporter of peeled tomatoes, pasta, and tomato sauce; and the second for wine. The biggest slice of such exports is destined to Europe, with Germany being the main outlet, but the trend of "*eating Italian*" has spread in the Americas, too, that account for 17.1 percent. Despite the growth enjoyed by the industry, the latter is characterized by some structural flaws that prevent it from reaching its full potential. Among these, the most impacting ones are its excessive fragmentation, with family-run businesses representing authenticity but at the same time a constraint to internationality and global competition; the absence of large distribution chains abroad (such as the French Auchan and Carrefour) to facilitate the entry of agri-food into target markets; the Italian Sounding phenomenon, that weakens the positioning of authentic Italian goods abroad. This will serve as the main focus of this study. Italian Sounding consists in marketing products as if they were made in Italy to deceive consumers into thinking they are purchasing "Italian" and profit from the positive image MI enjoys. This produces enormous negative repercussions to the diffusion of MI in the world. To understand its magnitude, it is enough to compare the global turnover of MI – all-time high hit in 2021 of around 51 billion euros – and of IS – the turnover of false Italian food has reached 120 billion euros in 2022.

LITERATURE REVIEW

Country-Of-Origin effect

As mentioned, the IS phenomenon is the extreme application of the COO construct. The study of the country-of-origin phenomenon and of its effect on buyers' behaviour is one of the most relevant and extensively researched in contemporary marketing. It has often been recognized as a decisive competitive factor for products' trading and marketing in foreign markets and thousands of theories have been produced which reflect the multi-dimensionality, dynamism, and relativism of this construct. In its simplest definition, it refers to the impact that knowledge about the origin of a product influences the evaluation of the same by foreign consumers (Usunier, 2006); Bertoli & Resciniti, 2013). Many factors influence it, such as, the country's political, economic, and cultural contexts, industrialization level and typical products. It's important to understand its components in order to predict how consumers perceive a country's goods and services in their purchase decisions. From the point of view of manufacturers and companies, studying people's habits allows them to offer products as close as possible to their needs and wants and gain a competitive advantage. This is particularly true for companies competing in international markets, as it also leads to increase their export potential (Egan, 2007). Recently, in the food industry, the spotlight has been turned on the origin of goods for being the main driver for international consumers' choices. In general, researchers conceptualized the COO phenomenon as a form of country stereotyping that consumers rely on in their decision-making process when other product-specific information is not easy to find. In these circumstances, buyers will use their image of the country as an indicator of products' characteristics to guide their purchase decisions. This image, or "*mental association*", is frequently activated by specific product cues, and can be represented as a sum of stereotypes about a nation and its manufacturing capabilities (Nagashima, 1970); (Wang et al., 2012). Following the introduction of this notion by Ditcher and Schooler in the 60s and up to the 80s, a first line of "single-cue" studies concluded that products' country of origin does influence consumers' evaluative judgement of the product. However, by studying this relationship *unilaterally* they overestimated the COO effect. From the mid-80s on, "multi-cue" researches have looked at it in relation to all potential variables – brand: strong two-way relationship between brand and COO, well-known brands increase consumers' evaluation of their origin country and a positive perception of a country increases quality perception of a brand's products. Packaging attributes, colors, images, wording, labelling: these positively influence products' perception by consumers; their effect is stronger if actual quality cannot be judged. Product type, categories, and characteristics: the COO effect on consumers' evaluation of products is positive, as they rely on their perception of a country to infer its products' quality. Consumer involvement: for low involvement purchases, consumers trust the COO to assume quality; trust is even higher for consumers showing high levels of product-country knowledge. Familiarity: consumers show a greater propensity to evaluate products using its country image if they are little or non-familiar with it or its brand. Country's characteristics and development: economic, political, cultural, and social factors, influence the intention of foreign consumers to buy a country's products, regardless of quality. Income level, education, social class, and age: high level of income and education are associated with an increasing preference for foreign products, while the latter decreases with increasing age. Patriotism and ethnocentrism: Some consumers exhibit a tendency to evaluate more favorably domestic goods over imports despite of actual quality; this is often in turn associated with other socio-demographic characteristics (age, gender, income, etc.) and country development.

Italian Sounding

The magnitude of Country-of-origin effects clearly depend on consumers' opinion about a country itself. Because of the unmatched quality and variety of the Italian agri-food heritage and of the cult of Italian cuisine around the world, the intense COO effect enjoyed by its most representative brand, namely, *Made in Italy*, has not gone unnoticed. On the contrary, the popularity of food traditions gave rise to a parallel economy, the Italian Sounding industry: *the use of images, colours, place names, trademarks, that recall Italy, in order to market goods, despite the fact that these have no connection to the Italian originals they are made to look and sound like*. Unlike counterfeiting practices, this is completely legal. However, IS products have neither the same Made in Italy excellence, nor any link to Italy's traditions and culture. From the exceptional nature of the Italian agro-food sectors, the IS has only taken the *halo* surrounding

MI products, transforming a competitive advantage into a weakness. Its economic significance has been underlined from different perspectives, but knowledge of its social-psychological foundations is lacking. Viale (2012) argues that, to trigger a mental representation of Italianness in consumers' minds, it is not necessary that the product is manufactured in Italy, but it is sufficient that a symbolic link leads them to see through green-white-red-coloured glasses. In IS, the presumed link is constructed by means of a mix of words, colours, images, recipes. Several studies, including Fournier (1998), state that, besides serving as a quality cue, the country of origin of products holds a symbolic and emotional value. It may signify prestige, authenticity, or exoticism, by connecting a product to a rich country-product imagery and to a nation's identity, with emotive and affective overtones (such as memories). These studies show that such symbolic and emotive associations make the COO a "expressive" or "image" attribute that eventually determine consumers preferences. Examining available literature has allowed to distinguish four categories of imitation, according to their degree of clarity or ambiguity. 1. Use of allegedly Italian unregistered recipes or false Italian recipes (culinary false), examples are "Bolognese sauce", Italian dressings, "Alfredo Sauce". Such naming clearly leads consumers to think of Italy and restricts the use of authentic recipes as a tool to promote Italianness in the world. 2. Use of graphic signs and pictures on packaging, such as, the use of the Italian Tricolor, drawing of the "Boot", its regions, landmarks like the Colosseum. Images of families are also frequently used to convey the idea of the "Dolce Vita". 3. Names and Surnames as brands' names. This aims at characterizing brands or companies as belonging to Italian descendants although they have lost every productive and cultural link with the mother country. "Da Vinci", "Gattuso", or generic product names such as "Mozzarella" are used to evoke the wrong suggestion in consumers' minds that an Italian manufacturing is somehow involved. 4. Obvious reference to Italy while absolutely untrue: explicit use of the Italian flag, the name of Italian cities, regions, places, Italy itself, random words ("amore", "nonna", "gusto") or expressions such as "product of Italy", "Italian style". Finally, the simultaneous use of these imitations is also frequent. The size of this allure, specifically quality-wise, seriously puts consumers at risk in terms of misjudging the product's origin creating a mismatch between consumers' expectation of what a Made in Italy food product is, particularly if they are familiar with it, and what they end up consuming, damaging the reputation of the Made in Italy brand. In addition, Italian manufacturers, committed to guaranteeing high quality standards, must compete globally with foreign ones, that categorically do not respect the same criteria but cost much less.
In fact, on one hand, the economic competitiveness behind the diffusion of Italian Sounding may be generated by Price. In general, MI products are marketed as upmarket, with a difference of about +90% over generic items, and +40-50% over imitated ones. Hence, IS represents an opportunity to buy the desired product at a competitive price, especially where consumers cannot detect significant qualitative differences or are budget constraints. On the other hand, the distance between palates, could represent the

discriminating element for the preference of sounding over genuine products. Consequently, the possibility cannot be excluded that consumers, although aware of the difference in terms of quality and regardless of price, simply prefer IS because it is closer to their tastes.

THEORETICAL FRAMEWORK

Three research area identified through the gap in available literature revolves around the possible motives, intentions, and causes behind the overwhelming popularity of false Italian, from consumers' point of view, as well as the rationality behind consumers' choices for Sounding versus Made in Italy. According to available research, the mental association resulting from product-country extrinsic cues is among the most significant element in shaping consumers' perceptions and their purchasing behaviour about agri-food items. This represents the foundations of the entire body of literature on the understanding of buyers' choices in similar contexts. Although the Sounding industry is one of the most profitable industries in Italy and around the world, exceptionally relevant for the Italian market and the Made in Italy industry, not enough importance is given to this particular field in the literature observed. Especially in an industry as competitive as the F&B one, where the first mover makes the difference and market share is essentially tied to costs and prices, consumers-related issues are expected to be given significant attention, as every company's decision revolves around them. Abundant studies have emphasized their general significance, but none have looked at the role of consumers in this specific sector. Additionally, not enough researces have been carried out in Italy. The Made in Italy label enhances the desire and appeal of products for consumers, not only because it represents a quality cue, indicating products' geographical origins, but also because of tangible and intangible features related to them, such as traditions and culture. If foreign consumers do not have information or knowledge about Italian food products, or lack the ability to classify it, they may justify their purchase according to their perceived country image, which is based on whatever knowledge they may have about a country itself, even if unrelated to the particular product category they are buying. While "Made in Italy" is confirmed as a conceptual category consolidated in the minds of consumers, since there is a clear recognition of related products in terms of qualitative characterization, there is no extensive literature on the perception of the real worth of this brand on the part of foreign consumers. Prior research has merely looked at the antecedents of customers buying behaviour. Although sufficiently accounting for country-of-origin factors, it has not analyzed the antecedents of the Italian Sounding phenomenon in details nor its acceptance in the food sector.

Research design development

Earlier studies have served as the cornerstone for creating the framework of the current research. Given the limited studies addressing this set of phenomena, in particular on the social-psychological processes regulating IS consumers' choices, the present study is developed with the goal of examining the effects of

IS on consumers' assessments of agro-food products associated with Italy and their consumption choices for such targets. The main goal of the research is to determine whether a product's COO label, *when viewed in terms of IS*, can affect the product's "Italianness," its general reputation, and associated specific reputation features, as well as the attitude of consumers toward that product. Even though Italian fakes do not have negative implications on consumers' health and do not always imply low quality, they do represent a threat to the identity of traditional Italian food, not only to the Made in Italy export economy. Imitations limit the diffusion of authentic Italian recipes which represent a strategic instrument to the promotion of Italianness in the world. The risk that foreign consumers identify culinary false, whether recipes or products, as authentic and representative of the Italian lifestyle, is high. In order to overcome this, it is necessary to understand the root of this social-cognitive issue. Therefore, the aim of this study is to confirm the idea that customers perceptions can influence their choices when triggered by specific elements, interpreted as favourable to consumers' conditions. These concerns will be addressed in the following section. First, it is necessary to better outline three main research hypotheses that will lead to the study's findings.

H1: Perceived Quality is positively related with Purchase Intention for IS products
H2: Element Price is negatively related with Purchase Intention for MI products
H3: Element Taste is positively related with Purchase Intention for IS products

As previously said, when it comes to food and especially to unfamiliar brands and/or products, consumers rely on extrinsic cue to assess quality prior to purchase. Identifying the country of origin, hence, helps them in speeding up this process by acting as a quality signal for all related purchases. Often, information retrieved on labels and packaging is the only exposure to a product that consumer experience before choosing. By leveraging on visual elements (graphic representations of landmarks, colors and wording recalling Italy, …), IS persuades consumers into thinking they are buying a product whose quality is superior.

Secondly, regardless of any distinction between opposite products and substitutes, authentic and imitated products could find themselves in a direct confrontation in the competitive environment of a large market, where the consumer considers these products as perfectly substitutable and consequently chooses on the basis of price. On the basis of more affordable prices, IS could gain a competitive advantage from those knowledgeable consumers who purchase Made in Italy but are price-sensitive, or from consumers for whom the ration quality/price of IS seems more advantageous.

Finally, in the circumstance in which consumers are aware of the differences between the classes of products at stake, the perception of such differences, from the country of production to quality and taste, could explain a greater propensity of consumers towards a product over another. This suggests the existence of a competitive advantage of Sounding items based on Taste which is typically "adapted" and therefore closer to the palates of foreign consumers. Based on what articulated until now, the "purchase intention" acts as the dependent variable that the research presented above aims at investigating. The variables "perceived quality", "price", and "taste" may be defined as the main independent variables. As suggested from the literature investigated, these are key factors in driving consumers acceptance of Italian Sounding and in influencing their purchase decisions for IS products.

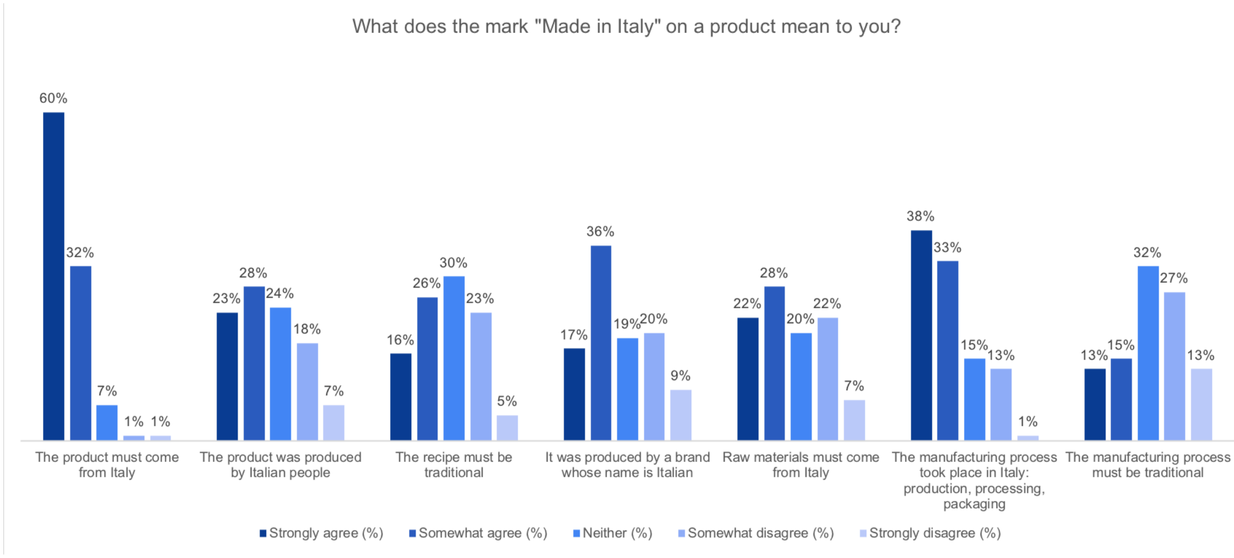
RESEARCH STUDY

The research process follows the logical ordering laid out in the three research hypotheses. Data collection in this study was conducted through an online survey, tailored and distributed to a pool of grocery shoppers in Dublin, Ireland. Nonetheless, the research is not restricted to Irish customers, because of the presence in the largest city of the Republic of Ireland of plenty of nationalities. This interculturality allows to collect a diverse range of samples and to gain a cross-country and cross-cultural perspective on the subject at stake. The questionnaire aims at examining customer perceptions of Italian food products, their knowledge and interest in authentic Italian items, their grocery shopping habits and purchasing intentions for some traditional products, familiarity with the phenomenon of Italian sounding, and finally their willingness to pay more for authentic products. Consumers (respondents) are targeted with some pre-selected product categories that fall within the most exported Italian agrifood stuffs. Then, they are presented with actual product images from the said food categories that have been previously preselected, this allows for the manipulation of the primary dependent variable (purchase intention) on three different "Italianness degrees": Protected Designation of Origin / Made in Italy, Italian Sounding, and Generic Foreign. In terms of the research methodology, the current study makes use of a survey to investigate a contemporary occurrence within its context. In terms of research approach, the study uses explanatory research, that is, research carried out with the aim of analyzing the relationship between variables through hypothesis testing, and it falls under the category of quantitative research because it makes use of correlation analysis to determine the sensitivity of respondents to the given attributes and because it uses quantitative methods, namely methods that use a number of samples and numerical data. Therefore, a Google survey has been conducted and distributed in Dublin throughout January 2023. It has been divided in three main parts: the first part identifying respondents' familiarity with Italian food and their related shopping attitudes; the second part containing three statements or food tests about their purchase intentions for the three levels of Italianness; the third identifying respondents' profile. For most questions, a 1 to 5 Likert scale has been adopted as the measurement scale; for others, a five-point bipolar semantic differential scale was used (i.e., very familiar/unfamiliar, most likely/most unlikely).

The survey has been filled out by 113 respondents but only 107 answers were valid. Respondents' range of ages were 20% from 18-24, 50% from 25-34, and 22% from 35-64. In terms of gender, data is equally distributed. Most individuals are regular or frequent travelers, and the vast majority (72%) has visited Italy at least once. Overall, the study accounts for 30 nationalities, with Germany, Ireland, Spain, UK, France, and the U.S. being the most frequently reported by respondents.

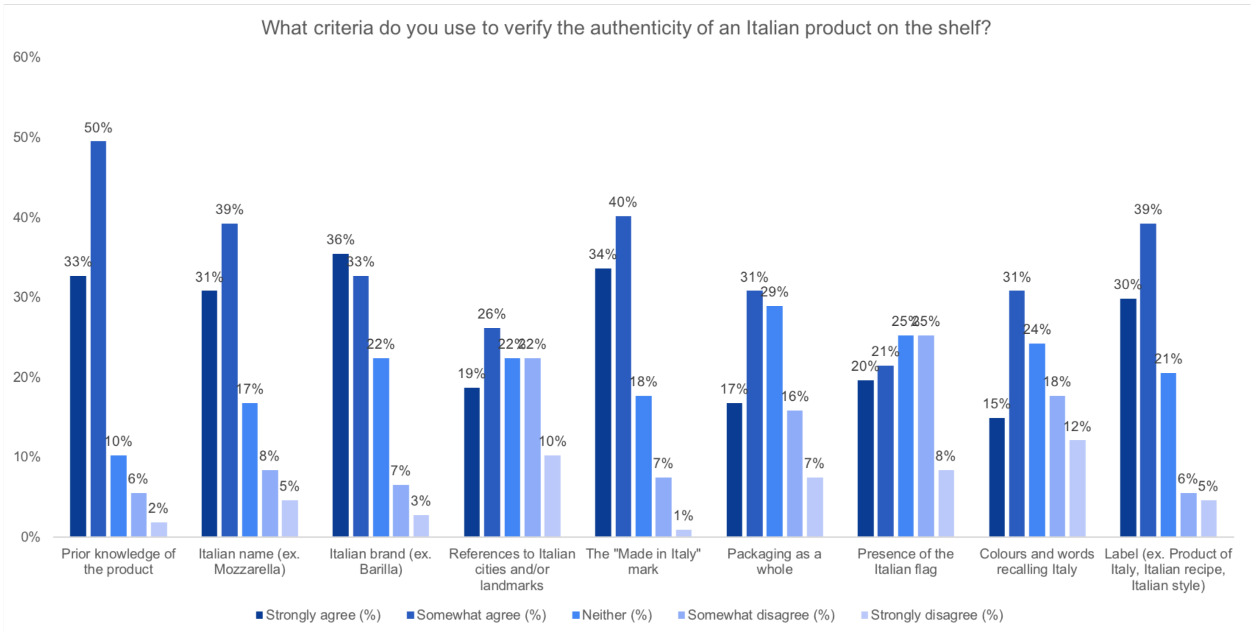
According to behavioural and psychological questions, it has first been asked: "What are the first three words that come to your mind when thinking about 'Italian food'? The most common answers include both famous Italian raw materials and recipes, such as tomato, parmigiano, guanciale, basil, olive oil, gelato, carbonara, cannoli, pesto, ragu; but also, feelings, emotions, and memories, such as home, family, hearty, lifestyle, enjoyment, care, comfort, amore, love, happiness; other common words instead refer to the attributes of 'Italian food', quality, variety, tradition, excellence, fresh, healthy, tasty, delicious, handmade, wholesome. This first glance at what Italian food means for foreign consumers reveals how an immediate mental association with the country and its resources evokes emotions, a feeling of lifestyle, qualitative features of Italian cuisine as a whole, but it also straightforwardly brings up some well-known products. 40% of respondents consume Italian food at least one per week and 60% does so between twice per week and daily. Among the reasons why non-Italian consumers buy Italian foodstuff, 34% said it's because it matches their tastes, 24% because of its well-known quality; 26% because of Italy's traditions related to food or because food represents Italy and Italian lifestyle. Survey results also show that Pasta is the most frequently product consumers, followed by pasta condiments and sauces, cheeses dressings, cheeses, cured meats, wine, and coffee. Laslty, 92 out of 107 individuals associate Italian food with Quality. Consequently, high quality is deemed as an important driver for buying choices by 87% of respondents, while 92,5% considered products' taste as crucial. Coming to price responses are less clear, reflecting the idea that the premium price usually enjoyed by Italian products discourages consumers who do not habitually shop for them; while it's not an obstacle for niche consumers. As for packaging, responses are equally distributed, with 36,5% of respondents recognized packaging as a driver for choosing Italian goods. 48% of interviewees considers products' brand as a primary driver. Lastly, foreign consumers claim they are familiar with traditional products and recipes (91%) thanks to their trip to Italy (49), Italian restaurants (50), word of mouth (39), TV shows (33), and personal knowledge, including cookbooks, internet and social media, Italian relatives.

Subsequently, consumers have been asked about their knowledge and understanding of the notions of "made in Italy" mark, traditionality, and authenticity.

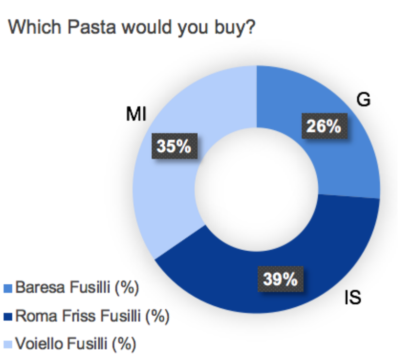


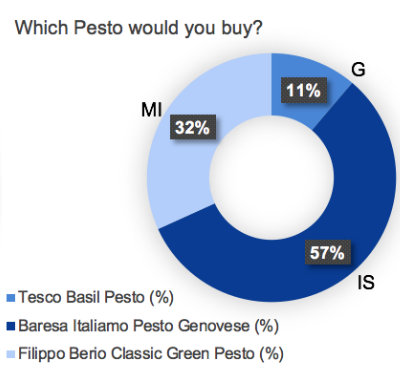
As the figure above shows, the majority of respondents believes that the mark "made in Italy" expressively means that a product must come from Italy. However, the nuances of this characterization are less clear - 52% of individuals state that its meaning is equivalent to "the products was produced by Italian people"; 53% believes this means "the product was produced by a brand whose name is Italian". When it comes to traditionality, responses are more equally distributed, meaning that consumers are not well aware of the importance of such aspect in differentiating a truly "Made in Italy" product from others. Interviewees fail to recognize that both a traditional recipe and manufacturing process are fundamental for a product to be considered authentic.

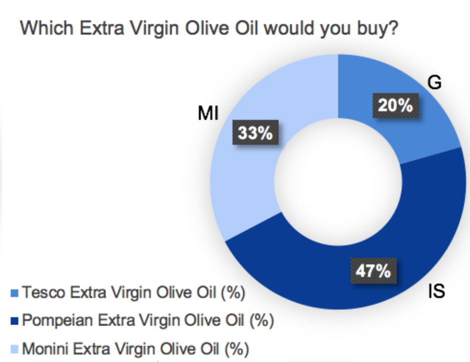
Afterward, consumers have been asked about the elements that allow to recognize an authentic Italian product, in order to check their knowledge of Country-of-Origin effects and of Sounding practices. Questions have been structured on the basis of the four categories of imitations identified in the literature. 70% of respondents rely on products' name (for example, the name mozzarella); 69% look at whether products' brand is Italian (ex. Barilla); 45% concur that references to Italian cities or landmarks on products' packaging are indicator of authenticity; 48% assess authenticity through packaging as a whole; 41% do so thanks to the presence of the Italian flag in particular; 46% through the use of colours and words recalling Italy; 69% said labels such as "product of Italy", "Italian recipe", Italian style" are a guide towards products' authenticity.



The second part of the survey contained three products tests – respondents were asked to indicate what item, among three apparently similar alternatives, they would buy. Products selected were Pasta, Pesto, and Extra Virgin Olive Oil, in that they are the most copied Italian products abroad. The first item presented was a Generic one (G), having little or no reference to Italy and the lowest price; the second alternative was an Italian Sounding product (IS), showcasing some of the imitation practices examined in the study of the literature including a price higher on average than generic goods; the third product was a Made in Italy one (MI), even in this case, references to Italy were minor, but the price resulted to be considerably higher than both IS and G substitute. For Pasta, products presented were Baresa Fusilli 1KG, €1.15 (G); Roma Friss Fusilli 500G, €2.19 (IS); Voiello Fusilli 500G, €2.95; for Pesto Tesco Basil Pesto 190G, €1.55 (G); Baresa Pesto Genovese Italiamo 190G, €1.99 (IS); Filippo Berio Classic Green Pesto 190G, €4.19 (MI); for Olive Oil Tesco Extra Virgin Olive Oil 500ml, €2.19 (G); Pompeian Extra Virgin Olive Oil 500ml, €4.49 (IS); Monini Extra Virgin Olive Oil 750ml, €8.85 (MI).







As showed by the figure above, in the first case (pasta) results are approximately equally distributed but looking at the percentage of people who chose the authentic alternative, this is only the 35%, while the remaining 65% did not recognize MI as the best alternative. Partly, this may be because the price difference between IS and MI was not significant, also, the brand chosen for the Italian pasta is well-known and established abroad. While some individuals may have considered the MI price/quality ratio as being the most favorable considering the renowned brand, others were attracted by the cheapest alternative (G) or were influenced by the COO effect enjoyed by the IS packaging. For Pesto, instead, the majority of respondents (57%) chose the sounding product. The MI item selected for pesto is considerably more expensive than the IS and this may have been a discouraging aspect for foreigners. Also, it is likely that most respondents didn't attribute a superior quality to the MI Pesto such as to justify its higher price, as the product itself is not extremely common in cultures outside Italy. The imitated item here represents the win-win choice: consumers can obtain an (apparently) Italian product for a convenient price. The scenario for Olive Oil is similar: 47% chose the sounding one, 33% the authentic Monini oil, and 20% the generic alternative. The IS item was once again perceived as the highest-value-for-money and a good deal to secure a quality produce, with the quality factor being influenced by the serval references to Italy on the IS packaging (while none is present on the MI one). Despite price being a driving factors in all these choices, when asked whether they would pay a higher price to make sure they obtain an authentic product, 78% of respondents said they would, indicating a willingness to pay between 20-60%.

RESULTS DISCUSSION

Survey results also served the purpose of identifying a series of variables related to the perception and evaluation by interviewees of the products presented. Both the statistic tool Excel and IBM SPSS 28.0 have been used to carry out the following analyses, allowing to draw some interesting considerations on the issues at stake and to fulfill the purposes of the research hypotheses.

Variable **attractiveness** reveals that Italian food exerts a strong appeal on international buyers, mainly generated from its affective component, besides its cognitive one. This refers to the emotional and symbolic meanings that food from Italy carries for people abroad and the latter desire to live the Italian lifestyle by adopting its culinary culture. Variable **familiarity** shows that, while foreigners claim a high degree of familiarity with typical products and recipes, actually, this is much lower. Furthermore, consumers are not aware of the difference between country of origin, manufacturing, and design, confirming the theory for which the less is known about a product, the more the information about the advertised country impacts on consumers perception. A pattern is observed on **consumers' ability to recognize MI products**: generic and sounding goods are attributed an Italian origin with double frequency than authentic ones. This suggests that consumers will rely on extrinsic cues available on products' packaging to attribute the COO and, in turn, to assess quality, particularly for low involvement purchases and high familiarity with the image country (as in the sample being analyzed). Variable **Perceived Quality** confirmed that Italian food is commonly associated with high quality by international consumers. Plus, this attribute is supposedly their main purchase intention driver. However, results seem to confirm the theory for which they are actually not able to detect qualitative differences between authentic Italian and fakes. Consequently, if actual quality cannot be judged (prior to purchase) they are led to choose the sounding items based on factors other than quality. As already confirmed by survey's responses, these include product name, brand, packaging (such as Italian cities or landmarks, Italian flag, colors, words), and labels ("product of Italy", "Italian recipe", Italian style"). Actually, similar labels are attributed a larger added value than the label "Made in Italy". As a matter of fact, the correlation computed between Perceived Quality and Purchase Intention for IS products is positive – a weaker positive correlation was found between PQ and PI for fake pasta and fake olive oil, while a stronger significant positive correlation between PQ and PI for fake pesto, meaning that, as perceived quality for fake products increases, the intention to buy them also increases. Interestingly, a strong significant correlation was also found among the purchase intentions expressed by consumers for all three items, indicating that people who tend to purchase IS for any given product category, tend to do so for other products as well, as long as the perceived quality is positive. **Hypothesis 1 is hence confirmed**, and it can be concluded that *visual and identity components greatly impact how well people perceive any given good* and, on the basis of a *perceived superior quality*, *purchase intention for Italian Sounding goods increases*. Results related to the **adequacy of the price/quality ratio** suggests that, in the decision-making process, once consumers whose perception of Italy is positive are faced with a series of packaging displaying elements related to said country, they immediately project their positive country image on products. As they are now led to evaluate all products as of equal quality, price becomes the differentiating element that drives their purchase intention. From the survey, it also results that most foreign consumers do not have gustatory tools sophisticated enough to judge the actual quality of Made in Italy products; hence, they don't attribute to them a qualitative superiority such as to justify their premium price. Lastly, it can be concluded that the price/quality ratio of MI items is not adequate, rather that of IS items is more advantageous. As a matter of fact, the correlation between the independent variable Price and the Purchase Intention for Made in Italy products is significantly negative. For all three product categories, the negative correlation is quite strong and significant. The highest negative correlation is recorded for Pesto, where the price difference between MI and IS is more than double, and still perceived by the international community as too distinctive for the use they could make of it. In this context, *the role of price is found to be decisive in the preference of one product over another*, hence, **Hypothesis 2 is confirmed**. Results reached on the **conformity of Italian products to the Tastes of foreign consumers** show a two-way pattern. Apparently, foreigners buy Italian food because of its taste, however, the majority of them is actually buying products whose taste is not Italian, rather, it is purposely adjusted to reflect the preferences of international markets. This confirms the impression that foreigners are prone to prefer IS to MI because it is closer to local palates. Here, MI is surpassed in value procured to consumers by IS: although aware of quality differences, and regardless of price, *consumers simply prefer IS because it is adapted to their tastes*. This theory is confirmed by the correlation analysis carried out between the independent variable Taste and consumers' Purchase Intention for IS products which turns out to be positive. The more fake products match international buyers' expectation, the more they are willing to buy them. Therefore, **hypotheses 3 is confirmed**, as well.

		PQ	PI IS Pasta	PI IS Pesto	PI IS Olive Oil
PQ	Pearson Correlation	1	,129	,207*	,108
	Sign. (two-tail)		,184	,032	,270
	N	107	107	107	107

		Price	PI MI Pasta	PI MI Pesto	PI MI Olive Oil
Price	Pearson Correlation	1	-,206*	-,234*	-,246*
	Sign. (two-tail)		,033	,015	,011
	N	107	107	107	107

		Taste	PI IS Pasta	PI IS Pesto	PI IS Olive Oil
Taste	Pearson Correlation	1	,176	,191*	,051
	Sign. (two-tail)		,070	,048	,064
	N	107	107	107	107

Managerial Implications

The current study supports the significance of perceived quality, price, and taste in customers purchase decisions for Italian food, as resulted by the literature. Practically speaking, businesses should focus on improving overall perceptions of product quality and finding price points that match consumers' willingness to pay, without neglecting the observation on tastes by foreigners and their palates. This goes beyond simply considering customer satisfaction. From a managerial point of view, the study's findings led not only to a clearer vision of the context of imitations in the Made in Italy agrifood industry and of consumers perceptions of Italian food, above all, it can be helpful for companies operating in the sector to understand how much consumers are linked to this facet. Furthermore, it enables them to put plans into place in this respect to satisfy customer preferences in international markets. Therefore, it is clear that in order to increase export strategies, improve the recognition of Made in Italy abroad, and define business models that allow to uncover new market opportunities, the need to take into consideration customer opinions is evident and foreign ones cannot be ignored. Transparent and straightforward communication, associated with education programs addressed to international consumers, may be instrumental to reduce information asymmetries and promote Made in Italy for its inherent quality and taste. Some similar initiatives have already been successfully out in place by Eataly and Rana's restaurants-kitchen-showcase. For what concerns DOC based in Italy businesses, collaborating with expatriate ones is a move that should be supported, as long as the positive perception of Made in Italy is preserved. Furthermore, because the Made in Italy industry is constantly expanding, it is crucial for businesses to take country of origin effects into account as a differentiating factor in shaping consumers' perceptions and use this aspect to their advantage. An investigation of these antecedents would be of practical significance for managers and allow them to increase a target-group and segment-oriented approach. Therefore, a logical proposition based on the findings is expanding national and regional brands. This could be a valid approach to spread traditional recipes and promote Italianness in the world, so to favourably influence customer behaviour and, particularly for those who have little affinity for Italy as a nation and little knowledge about its traditions and culinary specialties.

Future Research and Limitations

The research described in the preceding chapters made an effort to fill the vacuum in the body of knowledge regarding customer perceptions and acceptance of imitation practices in the food industry. All the components described in the conceptual framework were examined in order to find answers to the identified problems. Despite the many insights that arise from this analysis, the study does have certain limitations, which will need to be looked into more thoroughly in the future. First of all, extending the geographical distribution of respondents is of particular relevance, as consumption is shifting more and more towards international cultures and global markets. Then, it is important that future analyses ensure qual attention to each age group, as current data mainly covered the 18-34 range. This gap can be filled in the future by studying, for instance, how the perception of older generations has changed over the years, with the affirmation of internet and the globalization. Finally, increased investigation on the antecedents of country-of-origin effects and associated perception may be of practical significant. It would appear fair to incorporate them in future studies, particularly in regard to individuals with a high level of country-product knowledge, for whom the purchase intention is influenced by the country image to a lesser extent.

CONCLUSIONS

The present research was aimed at identifying the elements that influence consumers' perceptions of Italian food and that draw them to buy fake products instead of authentic ones. Furthermore, the objective of this study was to provide empirical evidence that buying decisions may not always be the result of careful consideration in each and every purchase. The extensive literature review has allowed to thoroughly understand the various factors that contribute to customer perceptions, particularly in a social-psychological view, and their implications on purchase intentions. However, literature does not specifically address the issue of the Italian Sounding phenomenon and of its antecedents, in the same way, extensive implications on the Italian eno-grastronomical industry are lacking. The analysis, nevertheless, has shown how crucial consumers' opinions are to businesses in the food industry and how marketing strategies should exploit them to fight against Italian Sounding practices. The goal of this study was to explore the potential drivers, purposes, and factors that contribute to bogus Italian food market appeal. Through the development of three research hypotheses, it was determined that Price has the strongest impact on purchase intention for Italian products, but a positive effect was observed also for Perceived Quality and Taste. In the circumstance described previously, it may be argued that the Italian Sounding phenomenon effectively harms Made in Italy, not only from an economic point of view, but in that it weakens the global presence of the brand and the perception of Italianness abroad, by promoting goods that do not respect Italian standards for quality and craftmanship, nor its traditions.

Made in Italy appears to be in a subordinate position compared to Italian Sounding. Since its origins are quite frequently confused for Italian, this distorting effect seems to be strong enough to induce the consumer to perceive an added value such as to make the cheaper alternative 100%Sounding appear more attractive than the more expensive 100%Italian one. In fact, the latter is not recognized a higher degree of Italianness, allowing the former to enjoy a greater COO effect, greater perceived quality and taste. This result openly coincides with the belief shared by many according to which the large sales volumes of this unfair competitor are the result of a "value-generating combo" devised by exploiting the reputation of the Italian agro-food sector, without having to bear the costs of production and transport.
The significant confusion detected in discerning Italian from Sounding seems to invoke a more direct and transparent communication. However, the fragility of Made in Italy seems not merely a matter of recognizability and unfairly exploited COO impact. In fact, although the "Single Trademark" solution fiercely promoted by Farinetti (Eataly) could facilitate recognition of the origin for consumers, this potential COO effect may not necessarily be able to please foreign consumers with the 100% Italian product. After all, they don't care whether food comes from the Bel Paese if this does not meet their expectations of "international" quality and taste, or if the very high typically Italian quality is totally irrelevant, misunderstood, or excessive compared to the use they could put it to.

Today the label "Made in Italy" encompasses a selection of goods and services for which Italy is clearly recognized for its high standards of excellence, originality, and design. These shape how the world views Italian culture and way of life and encourage differentiation tactics based on the "uniqueness" of Italian cuisine. Spreading the authenticity, recognizability, and reliability of the place of origin factor, thus, is critical to preserve the respectable reputation of the Italian agri-food industry and, ultimately, fuel its export potential and drive its competitive advantage.

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