

Affecting Customer Behavior through ‘Made in Germany’ within the Healthcare Sector

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Abstract

German corporations working in the international business within the healthcare sector face a lot of challenges throughout the globalization and the rising battle for customers. Having the right argumentation for the own products in hands mostly leads for differentiation compared to competitor’s products. The classification of ‘Made in Germany’ is well known in the world markets and customers authenticate the quality level with its origin. As healthcare products affect directly the patient treatment, customers within the healthcare sector require the latest product technologies paired with highest quality standards.

This article deals with the research question, if the classification of ‘Made in Germany’ is able to positively affect customer’s behavior for any buying decision. The results throughout this research represent great approaches about customer’s willingness to investment for latest standards in quality and technology, the importance of ‘Made in Germany’, as well as the acceptance of price for products that belong to that classification. Summarizing the results throughout this research, ‘Made in Germany’ influence positively customer’s behavior and is able to gain corporation’s competitiveness level. An early adaptation to corporation’s strategy is beneficial and recommended.

Keywords: customer behavior, competitive advantages, Made in Germany, healthcare sector

1. Introduction

1.1 Article Scope

This article is based on a prevailing situation of several German manufacturing corporations within the healthcare industry with the aim to gain their competitiveness level through ‘Made in Germany’ paired with the consideration of insecure global environmental changes. Those corporations follow since years the positive attributes of ‘Made in Germany’ about highest quality and latest technology standards. Due to the fact of limited growth potentials in the local market, the corporation’s focus mutates to a broader international scope considering emerging markets. According to Oltmanns (2013), western corporations expect to achieve about 70% of their future turnover from emerging markets. However, emerging markets possess with divergent consumer behaviors, different financial sources and different market conditions.

Since today, international clients have appreciated ‘Made in Germany’ and authenticate the quality level with this origin (Ahlert, Backhaus, Berentzen, & Tegmeier, 2007). Unfortunately, it is unclear if international clients within the healthcare sector rate ‘Made in Germany’ at the same level. With respect to rising competition, this article deals with the research question if the classification of ‘Made in Germany’ is able to positively affect customer’s behavior in purchasing products related to the healthcare sector under global environmental aspects. Within the healthcare sector, customer’s acceptance is the most important indicator to specify the selling strategy and its arguments correctly. According to Brunke, van Dongen, and Downey (2013), customers from emerging markets prefer cheap and simple products. To meet those requirements with respect to the quality classification of ‘Made in Germany’ challenges corporation’s scope and may affect future setups in manufacturing.

This article is built on a comprehensive literature review with focus to consumer behavior, the Country-of-Origin (COO) classification of ‘Made in Germany’ and its attributes in quality and technology, paired to generate competitive advantages along with customer’s acceptance. The goal of this article is to prove the competitive

argument of 'Made in Germany' within the healthcare sector that guides corporations with a German product origin to a long-term beneficial strategy.

1.2 Competitive Change

Nowadays, international oriented corporations within the healthcare sector face a lot of environmental changings in their business caused by the globalization, which affect the business cultures and behaviors like no other. To reply individually to any market specific requirements becomes a crucial success factors and influences massively the strategy at its core. According to Porter (1985) to classify corporation's strategy, it is all about choosing the right generic strategy separated in differentiation, cost leadership or the focus to one of both. However, the importance of having competitive advantages for the product or service compared to the competition rise. Considering and respecting the model of five forces by Porter (1985) with the forces new entrants, buyers, competitors, suppliers and substitutes, the necessity to adapt the prevailing strategy with the aim to ensure future business opportunities accelerate faster than predicted. Thus, strategies require a real-time adaptation respecting new market conditions in order to compete successfully in the future.

1.3 Made in Germany Classification

The classification of 'Made in Germany' is due to its origin an important topic for German corporations that follow international activities to differentiate the own product to the competition. The Country-of-Origin (COO) effect is within the research about consumer behaviors with focus to international markets, one of the frequently used terms (Amine, Chao, & Arnold, 2005). The aim of the terminology 'Made in' is to transfer information about the geographical origin of the product (Jaffe & Nebenzahl, 2001). The COO identification transfer a positive or a negative image to customers and affect their behavior (Elliott & Cameron, 1994). A customer's preference due to the COO identifications offers a lot of possibilities and opportunities for several studies that demonstrate ideally that the quality perception is analogousness to its origin (White & Cundiff, 1978). The term 'Made in' is in principle an identification of products manufacturing origin, which influences the perception of quality in front of the clients (Schooler, 1965). The term 'Made in Germany' is used within various industries for a long time as a synonym for high quality and reliability (IHK, 2013). Products designed and produced in Germany enjoy even today an excellent reputation around the globe (Ahlert et al., 2007). Thus, the COO identification is indeed an essential purchasing factor within an international business scope (Johansson, Douglas, & Nonaka, 1985).

1.4 Country-of-Origin Effect: Values and Perception

The perception of quality is linked to the product specification (Ashill & Shinha, 2004; Jaffe & Nebenzahl, 2001). That means, specific Country-of-Origin (COO) identifications differ from product group to product group positively or even negatively. That is why the quality image of Germany with reference to the automotive sector, for instance, is much better than for fashion. Thus, not all studies and results can be transferred to a generalized statement, because normally studies focus to a specific product group. Furthermore, the nationality of the respondents through the perception of products from different countries becomes important (Sattler, 1991). Amongst others is this factor influenced by cultural and linguistic distance between countries, or by historical events (Amine et al., 2005). In that way it is possible to detect dependencies between the COO effect and the stage of development of relevant countries. A common separation of the stage of development of a country is in More Developed Countries (MDC) and Less Developed Countries (LDC). Within this separation, products from industrial nations (MDC) are in principle more positive evaluated and are thus preferred products compare to products from non-industrial nations (LDC) (Amine et al., 2005; Schooler, 1971). In addition, a different image from a country over the time has been detected. In that way, an image of a product from a specific country with poor preferences from the past could nowadays have a better reputation (Verlegh & Steenkamp, 1999).

In a growing and developing globalization of countries, companies and even products, is the limitation of the Country-of-Origin effect according to Chao (1993) complex and difficult. Triggered by an increasing rate of relocation of production sites to Less Developed Countries with a low level of labor and production costs, a split from brand origin and production origin is detectable. In this context, Ulgado and Lee (1993) separate in Country-of-Manufacture (COM) and Country-of-Brand (COB). The understanding of Country-of-Manufacture is a country, in which the product and production has its origin. In contrast, the Country-of-Brand point on a country, where the brand owner has its origin only. Thus, a reputation of a product to a country image is given, as e.g. a typical image of Coca Cola has with the 'American way of life'. Both brand and product possess with individual and distinctive images, but are subject to temporal changes. So the separation of COM and COB is essential, because nowadays bi-national products exist, which differ in its origin of brand and production. Contrary, a product with same production and brand origin is called uni-national product (Ulgado & Lee, 1993).

Another limitation by Jaffe and Nebenzahl (2001) separate the additional information of the production country, which is commonly labeled on the product with 'Made in' plus the origin of production. A further separation adds the information Country-of-Design, Country-of-Partly Manufacturing and Country-of-Assembly. Therefore, the Country-of-Origin indication, which associates the origin of production for the clients, is not anymore congruent to the 'Made in' country labeling (Jaffe & Nebenzahl, 2001). Furthermore, the degree of product knowledge has influence to the relation between COO and the validation of products. According to Johansson et al. (1985) assumptions, the increasing level of experience or familiarity to a product simultaneously decreases the level of product validation due to its Country-of-Origin. Other product details, which are also affecting the COO effect, can decrease the value of the COO labeling (Ueltschy, 1998). As a result, clients insignificant consider the COO labeling in case of specific product details are available, to compare and evaluate with alternatives.

1.5 Considering Customer Behavior

One of the biggest topics in research in past and still today is the customer behavior. Referring to Kotler and Keller (2012) within the understanding of customer behavior, it has a direct impact to business performances. Referring to Lancaster and Massingham (2002) understanding customer's behavior is crucial in competition within the retail industry in UK and worldwide. With an example of China, Lee (2005) carried out a five stages study about decision making. Analyzing these five stages decision-making, the customer behavior has a significant impact within the family and the Chinese tradition. Other researchers have studied the same five stages in decision-making as well. The findings throughout that model are different tendencies that are offered by different researchers. However, the stages of decision-making are described similarly. According to Blackwell, Miniard, and Engel (2006), a common decision-making model contains five stages:

1) Problem recognition

Recognition occurs when the consumer recognize differences between what he need and what he has. Referring to Neal, Quester, and Pettigrew (2006) recognition occurs due to several circumstances, which are professional, personal and lifestyle factors. Furthermore, Winer (2009) separates in social, personal and psychological factors. Although, different researchers and authors classify different groups, but they are in principle similar in purpose and scope (Rao, 2007).

2) Information search

Information search, which can be internal or external, is following to Schiffman, Hansen, and Kanuk (2007) linked to a desired service or product. Internal information search rely on other customer experiences and recommendations. External information search includes media and advertising, or even feedbacks from others (Rose & Samouel, 2009; Wiedmann, Hennings, & Siebels, 2007).

3) Evaluation of alternatives

Evaluation of alternatives starts once the relevant information about the desired service of product is collected. Referring to Kotler and Keller (2006), this is the most important stage in decision-making as the customer takes all kind of alternatives and factors into consideration, as e.g. price or quality.

4) Purchase decision

The purchase decision is referring to Backhaus, Hillig, and Wilken (2007) the most important, because stage four process the transaction following the purchase decision. According to Kacen and Lee (2002), the purchase decision can be separated in planned purchase, partial purchase or impulse purchase.

5) Post-purchase evaluation

The post-purchase evaluation considers the customer and their purchase experience. Neal et al. (2006) argue that this stage is also important as the experience of stage five affect other customers in stage three, the evaluation of alternatives.

To summarize the definitions and arguments about customers buying behavior, a clear understanding of customer's behavior and to identify their needs and wants is overall essential. However, it is difficult to determine the exact reasons of customers buying decision and their preferences, which is sometimes guided by emotional influences. Understanding customers and respecting customers acceptance in principle lead to a long-term business success (Kotler & Keller, 2006).

1.6 Environmental Change

After the globalization boom since the 1980s, the business of today is subject of some familiar habits that are wrong influencing prevailing business activities. At that time it was thought that globalization was inevitable,

capital was cheap, evolutionary technologies would offer new ways to customer access and would reduce costs, natural resources were not expensive and scarcity were not a problem. The future business environment will become very different as from that from today or even from past. Following the forecast of the business environment for the next decades by Curry (2011), the business landscape will be built on eight characteristics:

- 1) Increasing population
- 2) Shift towards Asia
- 3) Financial flows
- 4) Energy availability
- 5) Resource scarcity
- 6) Water and food scarcity
- 7) Technology
- 8) Response in globalization

Combined, the first three characteristics create a larger demand and consumption of goods, which is the result of a growing mid class and its increasing interests. The characteristics four to six acts negatively to the consumption. The final two characteristics affect the consumption and its way it is transferred to the consumers. Over the next decades, these characteristics will influence and brand the business environment with constraints about resources and opportunities (Curry, 2011). The changing environment makes it harder to generate turnovers as in the years before, as the growth is limited and the competition rise. Constraints as the over taxation and the ecological exposure affect that emerging markets in Asia or Latin America region will come to the same level of expense as for example Europe. The consumption of Asia or Latin America will not increase with the same speed, because their income increases lower. Moreover, their markets are well populated with local brands, which are effective in their own way responding to local needs and demands. The theories of economics argue that there are always opportunities, especially for technological innovation. The biggest problem with new technologies is that those are too late at the market to influence a certain transition from today to tomorrow. Thus, the business as usual will expect an interruption. Furthermore, the expectations in growth are limited. That is why the risk of being not prepared for any kind of interruption to the usual business is significant (Curry, 2011).

The availability and consumption of energy influences the manufacturing as well. As a result about the rising energy consumption, the energy prices rise simultaneously and thus become top priority for overall costs and especially for manufacturing costs. The managing of energy consumption influences the competitiveness and becomes more and more important for corporation's strategy planning in the way they design their products, improve their operation level and adjust their supply chains (World Economic Forum, 2012). However, corporations adapting to future conditions have a few options to improve:

- Efficient Operations Improvements

This could be done through installing up-to-date equipment, modern and sustainable constructions, energy cogeneration, energy monitoring, use of recycling materials, use of alternative materials, or changing the production method.

- Supply Chain Improvements

This could be done through reducing the packaging, rerouting deliveries, working with suppliers, or relocating the production.

- Efficient Product Improvements

That helps companies to save money, increases the demand among customers and boosts the competitiveness in term of differentiation. This could be, for instance, sustainable recycling packing or a production method done under environmental consideration, which allows customers to use less energy.

In the near future, companies face problems of scarcity and competition. Thus, strategies to compete need to adapt to the changing environment. Furthermore, current competitive advantages may change to meet the future business environmental needs. Therefore, a long-term strategy for companies manufacturing need to be redefine and will guide to find substitutes or science innovations (World Economic Forum, 2012).

1.7 Manufacturing Competitiveness

Deloitte (2012) reports through a study of about 550 CEO's a better understanding of a global manufacturing, trends and its competitiveness. This study explores the complex forces, which influences the manufacturing and procurement from today and may cause a structural reshaping of the manufacturing and procurement of tomorrow. Manufacturing includes all aspects of development, production, research, logistics, marketing, customer service, sales and support. The understanding of manufacturing in principle is essential to improve standards and to improve competitiveness for the company's product or service range (Deloitte, 2012). To rise the competitiveness level of a company's business with focus on manufacturing (World Economic Forum, 2012), a wider view for strategic adjustments and decisions is required. Furthermore, the use of the right arguments to foster or even to enhance the competitiveness level occurs. This survey covers responses from manufacturing executives, who are located around the globe. 39.7% of the responses are from North America, 28.5% from Asia, 5.4% from South America, 5.4% from Australia and about 21.0% from Europe. The results throughout this survey define the important subjects in shaping a modern production that is linked to know-how, creativity, knowledge, capital and technology. That is why corporations face to fast changings within their environment and need to strengthen their advantages and selling arguments.

2. Method and Hypotheses

The central question is how corporations can use the classification of 'Made in Germany' with its attributes as their competitive advantage within the healthcare sector. As the classification of 'Made in Germany' is synonym with highest quality level paired with the latest technologies, both attributes due to customers willingness to invest requires an analyze. Furthermore, the question about client's opinion and their importance for 'Made in Germany' is mandatory in order to address the competitiveness argumentation correctly. This research study is designed according to the paradigm of positivism, which tends to be concerned with hypotheses testing by using a large sample size that produces results with high reliability (Collis & Hussey, 2009).

2.1 Healthcare Product Requirements

As healthcare products can directly affect patient treatments, latest technologies are required and preferred. Furthermore, all products require the highest quality level and quality standards. That is why products that belong to the healthcare industry are subject to a fast changing industry. Fulfilling the latest technology and quality standards affect a high amount of investments for a continuous product development that increases the manufacturing costs. A high price for a product 'Made in Germany' is generally synonymous for the highest quality level (IHK, 2013), which fulfills the requirements for healthcare products.

2.2 Identify Subsections

This article focuses to the classification of 'Made in Germany' within the healthcare sector. As stated before, the product origin has an impact to customer's buying behavior. Furthermore, 'Made in Germany' enjoys excellent reputation and is synonym with the highest standards in quality and latest technologies. Thus, the aspect of quality and technology due to customer's investment are part of this research. The principle question analyses, if customers would invest more for the latest standards in quality, as well if they would invest more for the latest technologies. Both quality and technology aspects would manifest the COO effect, especially for German products within the healthcare sector.

As the primary data collection is linked to a German leading exhibition, customers consider the reputation of Germany with its positive attributes. A further principle question addresses foreign respondents to rate the importance of 'Made in Germany' classification.

As stated before, to fulfill latest quality paired with the latest technologies, larger investments are for corporations necessary that influences the price. The last principle question addresses respondents, if they accept the price for products classified with 'Made in Germany'.

2.3 Sampling Procedures

The primary data covered throughout this methodology for social science have been collected at the MEDICA exhibition in November 2013, which is one of the world's biggest fairs in healthcare. A sample size of 382 positive responses has been identified (Krejcie & Morgan, 1970). The question design requires a pre-selection of the origin of respondents, because the opinions and expectations of international visitors are solely of interest. The primary data collection considered respondent's origin through a separation into North America, Central & South America, Western & Central Europe, Eastern Europe & Russia, Middle East & Gulf Countries, Africa, Australia and Asia.

3. Results

This data collection has been carried out at the MEDICA exhibition 2013 with a total response of 636 from all predefined regions of the world. The data collection has been carried out through a face-to-face survey. The sample size of about 382 positive responses has been fulfilled with almost 66.5% on top. Thanks to a successful survey design and planning, the results represent a clear tendency about customer's behavior related to 'Made in Germany' and its potentials within the healthcare sector. The results represent only the opinions of foreign respondents, because German natives would rate differently and are therefore not under consideration. The subtopics related to this article and research is the aspects quality, technology, the importance of 'Made in Germany' and the acceptance of price that have been addressed to respondents in four questions.

3.1 Aspect of Quality

Table 1. Survey question 1 - aspect of quality

Q1: Would you invest more for the latest quality?	No. of respondents
Yes	558 (87.7)
No	78 (12.3)
Total	636 (100.0)

Note: Figures in parentheses are percentages.

N=558 (87.7%) respondents out of the total N=636 (100.0%) would invest more for products that offers quality according to the latest standards. Only n=78 (12.3%) would not invest more for quality.

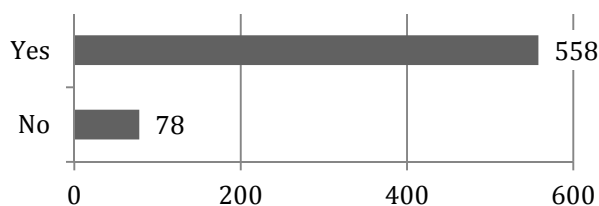


Figure 1. Response share - aspect of quality

3.2 Aspect of Technology

Table 2. Survey question 2 - aspect of technology

Q2: Would you invest more for the latest technologies?	No. of respondents
Yes	553 (86.9)
No	83 (13.1)
Total	636 (100.0)

Note: Figures in parentheses are percentages.

With a response of n=553 (86.9%) out of a total response of N=636 (100.0%), respondents would invest more for products that offer the latest technology standards. N=83 (13.1%) would not invest more technologic innovative and latest products.

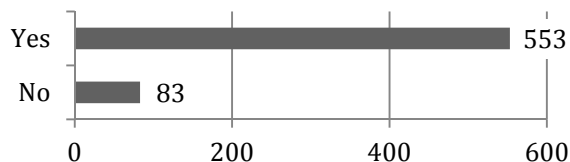


Figure 2. Response share - aspect of technology

3.3 Importance of Made in Germany

Table 3. Survey question 3 – importance of Made in Germany

Q3: How important is the classification MADE IN GERMANY for you?	No. of respondents
Very important	121 (19.0)
Important	309 (48.6)
Neither important nor unimportant	140 (22.0)
Unimportant	56 (8.8)
Very unimportant	10 (1.6)
Total	636 (100.0)

Note: Figures in parentheses are percentages.

The importance of the classification ‘Made in Germany’ is out of a total response of N=636 (100.0%) rated as ‘very important’ with n=121 (19.0%) and ‘important’ with n=309 (48.6%), which is in sum 67.7%.

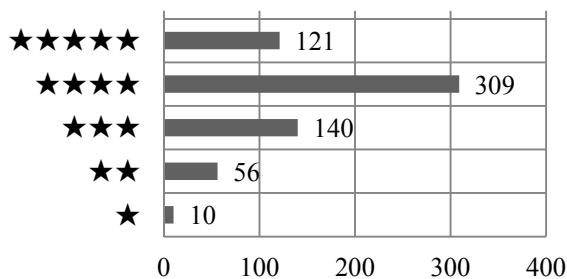


Figure 3. Response share – importance of Made in Germany

3.4 Price for Products Made in Germany

Table 4. Survey question 4 – price

Q4: Is the price for products MADE IN GERMANY for you acceptable?	No. of respondents
Yes	313 (49.2)
No	323 (50.8)
Total	636 (100.0)

Note: Figures in parentheses are percentages.

The acceptance of the price for products classified according to ‘Made in Germany’ is with n=323 (50.8%) not accepted and with n=313 (49.2%) accepted.

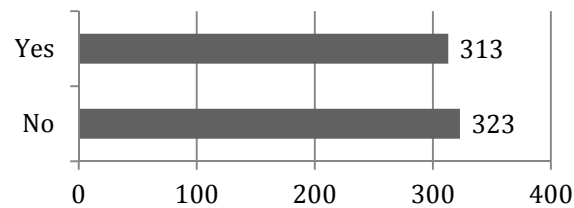


Figure 4. Response share – price

4. Discussion

Nowadays, the globalization affects the business environment like no other. Corporations need to strengthen their business by choosing the right strategy paired with the right competitive advantages. Based on the generic strategies by Porter (1985), the aspect of differentiation leads to set and adjust product specific values and arguments that at least fulfill customer's needs to respond to market specific requirements in time. The attribute of the 'Made in Germany' classification has excellent reputation and authenticate the quality level. Since today, international clients within the healthcare sector appreciate that classification and consider the products origin as a purchasing factor. According to Kotler and Keller (2012), the consumer behavior has a direct affect to the selling performance. It is crucial to affect customers purchasing behavior through all stages of decision-making positively.

With the change from the industrial age to the information age, the power of customers increases. Their influence in offered services, individualization of products, as well as in the level of quality will cause changes. Consumers are now able to compare preferred products and evaluate them according to their individual needs. Furthermore, they are less loyal to brands. In times of change caused by the information age, the globalization, the deregulation of markets, as well as the technological change offers for German manufacturing companies outstanding possibilities to adapt their manufacturing situation. Corporation, who pro-active face the adaptation to future market conditions have some options to improve. Those improvements focus to an efficient operational level, adapted supply chains and efficient products. However, it must be remembered that competitors and other actors can use these benefits and improvements, too.

The primary data collection throughout the survey represents fundamental approaches for products within the healthcare sector. Customers with about 87.7% would invest more for the latest quality standards. Furthermore, customers with about 86.9% would also invest more for products that offers the latest technology standard. The classification of 'Made in Germany' is well known and is for customer's buying behavior with about 67.6% rated as 'very important' and 'important'. The response related to the price level of products classified with 'Made in Germany' is almost at the same level and is neither not accepted nor accepted.

Summarizing the results, the classification of 'Made in Germany' is within the healthcare sector positively rated and well accepted in the world markets. A product that offers the attributes of latest standards in quality and technology are important aspects for customer's buying behavior due to their investment willingness. The price level of products 'Made in Germany' is in some regions acceptable and in some not. However, a product classified as 'Made in Germany' is indeed a positive aspect in term of differentiation and transports positive attributes to customers. Thus, the classification of 'Made in Germany' offers possibilities to affect customer behavior within the healthcare sector positively.

This article has examined the relationship between the difficult situations of several German corporations following the characteristic of 'Made in Germany' with losing competitiveness. The results support the thesis that the COO identification 'Made in Germany' within the healthcare sector is accepted and customers consider those attributes for their buying behavior. With the international battle for customers, 'Made in Germany' is able to gain corporation's competitiveness level and is for strategic purposes recommended.

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