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Home country bias in counsumers' retailer preference formation in Hungary

The role of cognitive, affective and normative influences

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EXECUTIVE SUMMARY

The purpose of this paper was to explore whether and through what mechanisms a politically-motivated 'buy from nationals' campaign that apparently has been unfolding in Hungary over the past two and a half, can influence the retailer patronage behaviour of consumers.

It reviewed the streams of literature that appear to carry relevance from the viewpoint of the subject, and highlighted the need for specific knowledge regarding consumers' preference formation for retailers of domestic versus international origin. It argued that the extensive literature on domestic bias at the product level is most useful; nevertheless, animosity/affinity vis-à-vis retailers might significantly influence consumer choices well before getting down to the product level.

A representative sample (N=619) of respondents revealed their capacity to differentiate between Hungarian and foreign retailers, evaluated their experience regarding individual retailers and expressed their level of (dis)agreement with a set of affective statements. Responses were analyzed through a complexity of statistical methods.

It is shown that discriminatory retail patronage is emotional, that is, affective. In contrast, positive patronage behaviour is cognitive, that is, rational. It follows that 'buy from nationals' government policies need to expound and personalize emotional factors. International retailers can counter the pro-domestic tide through strengthening their advantages in attributes such as affordable quality, merchandise selection, convenience of access and service excellence.

An important contribution of our study to the respective literature is first, the finding that consumer ethnocentrism, regarded more often than not as a normative influence, may also appear as an affective factor, and second, that affective factors influence patronage choices

not directly but through impacting upon consumers' cognitive preference building processes.

CHAPTER 1

THE RESEARCH PROBLEM

This study focuses on the processes of consumers' retailer preference formation in the context of domestic versus foreign retailers in Hungary. It differentiates between cognitive/rational and affective/normative influences as for retailer preference formation and confronts the outcome with the retailer origin recognition accuracy of consumers. In the context of domestic versus foreign retailers, do consumers develop preferences for retailers of known and actual domestic or international origin? Besides crucial objective (?) retailer attributes, what is the influence of affective and normative factors, if at all identifiable and distinguishable, in perceived retailer preference such as patriotism, nationalism, cosmopolitanism or consumer ethnocentrism? Are consumers' perceived retailer preferences indeed manifest in actual shopping behaviour?

Relying on the structured complexity of the relevant literature, a set of hypotheses will be developed that will try to answer the above questions through the proper quantitative testing of the implied hypotheses.

The case in review is food and daily convenience retailing in Hungary. With respect to our research focus, it is important that Hungary is a small, open economy with a retail industry that is highly internationalized (with Tesco as the market leader); yet more or less balanced as for the overall market shares of domestic versus foreign grocery retailers. Hungary is also a good case in point as its current government appears to be tacitly pursuing a 'buy from nationals' campaign, crusading against the major international retailers.

1.1 Academic background and relevance

It is generally acknowledged that meanwhile consumer behaviour induced by ‘product nationality’ is extensively researched, the role of retailer nationality in affecting consumer acceptance has been given much less academic attention. (McKenzie, 2004) The reason might be simple: what matters one might assume is what consumers find on the shelves – their bias if any, will be manifest when they are making their purchase decision based on comparing product attributes, including origin. However, prior to getting into this critical decision-making situation, the consumer must come to the shelves which belong to retailers of different national origins. There may be prior bias that influence to whose shelves the consumer finally arrives. It is in this sense that retailer origin matters.

Consumer response to international retailers as foreign entities “has not yet found its way into the literature and been tested within a consumer context”, concluded Alexander et al. (2010). Nevertheless, there has been a rich body of research that can at least in part be related to the issue under consideration. As it will be shown in Chapter 2, a range of helpful lessons can be drawn from varied streams of research which are related to

- store attributes and the theory of reasoned action,
- product country of origin,
- consumer ethnocentrism,
- consumer ideologies,
- institutional theory.

The varied nature and complexity of the respective research effort has greatly added to our interest in the topic that had originated outside the academic realm.

1.2 Policy background and relevance

The interest in this specific research area initially was spurred by its policy relevance as seen and experienced in Hungary. As it is going to be elaborated in some detail in what follows, Hungary's new nationalist-conservative government appears to be crusading, mostly tacitly but sometimes directly, against selected international organizations and companies, including the major international supermarket chains. Their 'buy from nationals' rhetoric may resonate with the Hungarian people that are sometimes characterized with cultural values (closed thinking, highly secular, low level of trust etc.) that bring them closer to countries like Moldova, Bulgaria or the Ukraine rather than to the neighbours in Central Europe (Keller, 2009). But will such a popular sentiment also be manifest in the actual shopping behaviour of Hungarian consumers? What influences consumer retailer preference formation in the context of domestic versus foreign stores?

The right-centre Fidesz, the major opposition party of the 2002-2010 period, won a landslide victory in the Hungarian parliamentary elections in April 2010. Fidesz secured more than two thirds of the seats in the parliament, being thus able, in legislative terms, to do whatever it will since even the constitution can be replaced with a two thirds majority as it actually was replaced in April 2011.

For PM Orbán, his government's actions are unimpeachable: they are the real democrats, they defeated the 'communists', i.e. the ruling Socialists, and they know what is right for the country. (The Economist, January 7, 2011) With constant reference to having a mandate from two thirds of the people (in fact, 53% of the voters voted Fidesz with an 50+ turn-out rate in 2010), Fidesz is on the way of turning Hungary into a 'managed democracy'. Orbán believes that it is time that the state rather than financial institutions or foreign investors take the center stage. He is convinced that growth can be restored through income tax cuts (a flat rate of 16% was introduced in January 2011) instead of further austerity as well as through an industrial policy targeted at sectors such as health, tourism, agriculture and renewable energy. To secure finances for that high-risk drive, the government coerced members of the mandatory private pension system to hand over a total of EUR 9.7 billion savings by threatening that they will otherwise receive no state pension and imposed windfall taxes (effective originally until 2013) on foreign investor-dominated energy, telecoms and retail sectors. Acknowledging that the measures sent a bad signal to foreign investors, Orbán said that “until we are out of the ditch, it is only fair that the strongest participants of the economy help those who are still in distress”. (Financial Times, October 18, 2010)

The tax on retailers, expected to raise EUR 110 million a year, is payable on sales revenue, not profit. The first HUF 500 million (EUR 1,8 million) of annual sales revenue is not subject to this tax. Up to HUF 30 billion of revenue, it will be levied at 0.1 per cent, rising to 0.4 per cent for the portion between HUF 30 and 100 billion. Revenue above this threshold will be taxed at 2.5 per cent. Most hard hit by this ‘crisis tax’ are market leader Tesco, followed by the SPAR, Auchan, Lidl, Cora and Penny Market. (Budapest Times, October 25, 2010) The mutually organized, domestic retail businesses such as CBA and Coop that occupy second and third positions in nation-wide revenue following Tesco, are exempt from the tax. “The result of this is”, the CEOs of the affected German-Austrian companies, including the German REWE and the Austrian SPAR, wrote in their joint letter to the EU Commission, “that foreign companies are disproportionately burdened in a one-sided manner”. (www.welt.de)

A law, effective from January 2012 through, allegedly, January 2014, subjects the establishment of retail units over 300 (sic!) square meters to special licensing (under the pretext of environmental sustainability) by an ad-hoc government committee, is also seen as an explicit move against international retailers. (HVG, October 13, 2012,pp.12-14)

Legislative discrimination has been complemented by a highly hostile, biased and one-sided reporting on international retailers, Tesco in particular, in the government-controlled media over the past two years. In Appendix 1, we registered how and what the government-controlled MNOnline (the online version of the Magyar Nemzet daily) and the independent NOL (the online journal of the independent Népszabadság) reported with respect to food retailers between June 2010 (the actual beginning of the Orbán-administration) and April 2011. Even without deeper analysis, the two sets of records are telling as for the implied bias.

The reasons for the Hungarian government's apparent domestic retailer bias are not being discussed in this paper. Suffice it to say that raising consumer animosity against international products/retailers may be intended to serve several purposes. Since, however, a 'buy national' appeal is inevitably constrained in a small, open, import-intensive economy, a 'buy from nationals' call may appear politically more feasible and attractive.

1.3 Factual background: Food retail in Hungary

Total sales of the Hungarian food retail industry were close to € 13 billion in 2010. Its nominal annual growth rate was 6.4% in the period 2005-09 (Datamonitor (2010) Food Retail in Hungary, p.9), whereas since 2007 there was a slight decline in volume terms in each consecutive year. (http://realdeal.hu/) Hypermarkets, supermarkets and discounters are the largest segment of the food and FMCG retail industry in Hungary, accounting for 60% of the industry’s total value. Convenience stores and gas stations make up for 22% and small-scale food and drink specialists another 9%.

In the hypermarket, supermarket and discounter industry segment, Hungarian chains account for 40% of total sales whereas they possess 90% of retail units. (See Table 1.)

Out of 13 players, the industry leader is Tesco, followed by CBA and Coop, the two largest Hungarian chains.

Retailer	Number of outlets	in %	Total sales euro million	in%
Aldi	78	0,7	247,1	1,9
Auchan	12	0,1	823,8	6,4
CBA	*3077*	*26,3*	*2023,6*	*15,8*
Coop	*5225*	*44,7*	*1826,6*	*14,2*
Cora	7	0,0	308,4	2,4
Lidl	148	1,3	840,2	6,5
Match	123	1,1	163,6	1,3
Metro	13	0,1	659,4	5,1
Penny Market	189	1,6	604,2	4,7
Profi	73	0,6	100.3	0,8
Reál	*2140*	*18,3*	*1314,4*	*10,2*
Spar/Interspar	389	3,3	1395,4	10,9
Tesco	212	1,8	2525,7	19,7
Total	**11686**	**100,0**	**12832,7**	**100,0**
Hungarian owned total	*10442*	*89,4*	*5164,6*	*40,2*
Foreign owned total	1244	10,6	7668,1	59,8

*Hungarian owned chains in italics.

Table 1 – Major actors in the Hungarian food and daily convenience retail industry, 2011*

Source: Authors' compilation based on various press reports

As for general consumer behaviour, the Hungarian market is thought to be extremely price sensitive, with other consumer satisfaction measures assuming less importance, leading to stiff price competition and creating opportunities for hard discounters. As a result of this price sensitivity, consumer brand loyalty falls behind West European averages and is even lower than the average for the CEE region (PwC 2006).

CHAPTER 2

LITERATURE REVIEW

A range of varied research perspectives need to be considered when one wishes to confront retailer origin recognition accuracy with consumer retailer preference, and the cognitive, affective and normative influences that may be underlying the latter.

2.1 The (retail store) attribute perspective and the theory of reasoned action

Customers' store loyalty defined as repeat purchase behaviour, is a favoured stream in retail management literature. Loyal customers are good for business, both directly and indirectly. Understanding store patronage behaviour is therefore a key success factor for retailers. (Seock & Lin, 2011) But why do customers prefer one store to the other? Besides accessability, merchandise- and service-related as well as other environmental store attributes are thought to be responsible.

These attributes have been defined and classified in different ways as the respective research progressed. Lindquist (1974) identified nine attributes that might have affected store-related consumer attitudes such as merchandise, service, clientele, physical facilities, convenience, promotion, store atmosphere, institutional factors and post-transaction satisfaction. Mazursky and Jacoby (1986) found that beyond the usual merchandise-related aspects (quality, price and assortment), service-related aspects (quality in general and salespeople service) and pleasantness of shopping at the store were the most critical store attributes in terms of shaping consumer attitudes. Meanwhile quantitative research consistently confirmed that merchandise-related attributes (price, assortment and quality) were the key (Velde et al. 1996), the realisation that these attributes were progressively equalizing, led to increased research attention to store atmospherics as the differentiating attributes of the early 21st century. (Turley and Milliman 2000; Burt and Carralero-Encinas 2000; Grace and O'Cass, 2005)

Fishbein's attitude model (1967) and Fishbein and Ajzen's theory of reasoned action (TOR) (Fishbein & Ajzen 1980) suggest that a person's attitudes and intentions precede his or her behaviour and that a person's intention is a function of personal factors. In other words, the performance of a specific behaviour will be determined by two major components: the individual's beliefs and his/her implicit responses associated with those beliefs. Store patronage behaviour, i.e. preference to one store as against another is such an implicit consumer response to a complex set of associated beliefs. These beliefs are culturally embedded. Besides varied individual characteristics such as demographics, consumers' evaluation of the relative importance of retail store attributes will be significantly influenced by cultural values.

Cultural values, predispositions and bias may differ significantly across countries. Suffice it to refer here to the epochal book by Geert Hofstede (1991) which developed a robust framework for assessing and differentiating national cultures. It was for these pervasive and long-standing differences that de Mooij and Hofstede (2002) warned that retailers might face serious losses if they enter countries with different cultural values unprepared. One must keep in mind, however, that culture, i.e. the cultural complexity of any environment or country is most difficult to be grasped in a way other than stereotyping. Hofstede's framework is a sort of sophisticated stereotyping but still a simple-minded schema of interpreting nuances and complexities. (Osland & Bird, 2000)

There have been limited research efforts aimed at developing a holistic model of retail patronage. A notable exception is Sirgy et al. (2000) whose integrative model described interrelationships between store environment, store patron image, the shoppers' self-concept, self-congruity, functional congruity, and store patronage behaviour.

The self-congruence model (Sirgy et al. 2000), albeit never tested in its totality, may also be a useful framework to interpret consumer patronage behaviour toward international versus domestic retailers. In that context, it is a question how much foreignness is part of the retail patron image, to what degree cultural openness, or conversely, an in-group identity (Verlegh 2007) is a part of the shopper's self-image and how much that self-image is mediated by social adaptation bias.

2.2 The (product) country-of-origin perspective

The literature is vast on the impact of the perceived country of origin (COO) of products or services on consumers' beliefs and buying behaviour. The fundamental tenet of the COO perspective posits that consumers evaluate products on their attributes and infer product desirability from a set of varied cues that can be intrinsic to the product such as product performance, quality, etc. or extrinsic such as brand name or country of origin. (Dmitrovic & Vida 2010)

In their guest editorial to the special issue of International Marketing Review on COO research Phau and Chao (2008) contend that doubts persist with respect to whether any COO effects reported may in fact be exaggerated at best or false at worst. "In effect, researchers and practitioners alike are asking: 'Is there any beef?' in your COO hamburger." (p 350)

Usunier and Cestre (2007) expressed severe doubts about the relevance of the faddish COO research for the marketing profession. Their general critique was countered by Josiassen and Harzing (2008) who argued that albeit COO research might suffer from self-referential dynamics and overspecialization, it was still very relevant provided it succeeded in addressing a few critical challenges.

Usunier and Cestre (2007) put forward five key areas where COO research might have stumbled. One was the reduced importance consumers attached to where a product was manufactured. In this assertion he was in agreement with influential scholars of the field such as Samiee, Shimp and Sharma (2005) who contended that "past research has inflated the influence that country-of-origin information has on consumers' product judgements and behaviour…" (p379) In their respective critique, Josiassen and Harzing (2008) referred to practitioner studies and statements to the contrary without carrying much conviction.

Usunier and Cestre's (2007) second argument was the proven gap between consumer perception and behaviour with respect to COO importance. This is a most crucial point because it suggests that consumers pay lip service to country of origin effects meanwhile they go ahead with shopping on rational grounds, or at least, influenced by many clues other than COO. Studying the biases of Chinese consumers for buying Chinese, the Boston Consulting Group (2008) found a critical gap between perception and buying behaviour:

Overall, consumers said that they preferred local to foreign brands in every category except consumer electronics and luxury goods. Yet despite the seeming conviction behind these attitudes, our research indicates that the choices of Chinese consumers are much more varied and nuanced than their statements would suggest. To a large degree, their brand preferences depend on demographics, product category requirements, and the propensity to trade up. (p. 2)

Meanwhile the counter-argument brought up by Josiassen and Harzing (2008), namely that the difference between perceptions and intentions is common and theoretically explicable may be right, the gap remains and if it is too big, no theoretical consideration can make COO perception relevant.

Thirdly, it is argued that COO information is increasingly blurred and hardly accessible for consumers. (Usunier and Cestre, 2007) One reason for this is that products in a global world may be manufactured in one country from parts produced in other countries using a design from the n^{th} country by a company that is headquartered again in another one. Another reason is the proliferation of what the Boston Consulting Group (2008) calls chameleon brands, i.e. brands that appear to originate from a more favourable origin than they actually do. Nevertheless, Josiassen and Harzing (2008) are right to put forward that COO stereotypes that emerge in the minds of consumers matter more than accurate origin recognition. The country of association (COA) comes to replace COO and that will be considered by consumers and managed by companies with the same (ir)relevance than the 'true' country of origin effect.

The fourth consideration of Usunier and Cestre (2007) relates to the interrelationship between brand image and COO image, suggesting that (global) brands become more important than origin, fatally downplaying the influence of the latter. Pharr (2005) found that a product's COO evaluations might be increasingly subsumed or neutralized by its brand identity.

Corroborative findings suggest consumers' product-specific COO evaluations are being displaced by a more holistic perception – perhaps a 'country image' – in the form of a multidimensional attitudinal construct consisting of cognitive, affective and conative components and aligning with the country to which a global brand has historical or developmental ties. (p. 41)

This recognition led to the notion and testing of consumers' brand origin recognition accuracy (Samiee et al. 2005) which was found to be universally low and less salient in predicting today's consumers purchase intentions.

Meanwhile, COO literature is predominantly product- rather than retailer-focussed, it was found to be highly enlightening with respect to our specific research interest. After all, consumers' retailer preferences are determined by varied intrinsic cues, i.e. store attributes such as convenience, price/value, merchandise selection and quality (Pioch et al. 2009) and by extrinsic cues such as brand name, domestic versus foreign origin and others. The latter are highly subjective, depending individual beliefs, ideologies and peer pressures. The differentiation made by Vida and Reardon (2008) with respect to the cognitive, affective and normative mechanisms in consumer preference formation for domestic versus imported products may be true for the retailer preferences of consumers in the context of domestic versus foreign retailers.

2.3 The consumer ethnocentrism perspective

Consumer ethnocentrism (CE) is meant to represent the normative beliefs held by consumers about the appropriateness or desirability of purchasing foreign-made products (Shimp & Sharma, 1987) or choosing international service providers. It is important to note that this construct is concerned with beliefs held by consumers rather than with their specific willingness to buy: whether ethnocentrism translates into purchasing behaviour is dependent on the host country in view (Witkowski, 1998), the specific country of origin and the particular product category. (Balabanis & Diamantopoulos, 2004)

In general, ethnocentrism focuses on a 'we-group' feeling where all outside groups are judged in relation to it. It rarely goes as far as a feeling of general superiority of the in-group over outsiders but it does imply formed stereotypical attitudes about out-groups, i.e. foreign countries. (Balabanis et al. 2001) CE was developed as the economic interpretation of the generic construct: Shimp and Sharma (1987) conceptualized CE as an individual's beliefs concerning the moral rightness of purchasing imported goods in the awareness of the adverse effects of such behaviour on the domestic economy and employment. Dmitrovic and Vida (2010) convincingly argued that this construct was basically normative as it entailed prescriptions as for purchase-related consumer actions in order to prevent adverse effects on the welfare of their country.

Shimp and Sharma (1987) developed a multi-item scale to capture consumer ethnocentric tendencies: their CETSCALE (Consumer Ethnocentric Tendencies Scale) has been extensively used and tested over the past quarter of a century. (Netemeyer et al. 1991; Herche, 1994; Hult & Keillor, 1994; Durvasula et al. 1997; Marcoux et al. 1997; Lindquist et al. 2001 ; Bawa 2004; Saffu & Walker 2005; Klein et al. 2006) Over time, the CETSCALE, even if modified from a 17- to 10-item measure (Steenkamp & Baumgartner 1998) and then to a 6-item one (Klein et al. 2006), has consistently been found to be a reliable and stable indicator of the intensity of consumer ethnocentrism in different countries or regions.

As for the antecedents of CE, Shankarmahesh (2006) identified four broad categories:

- socio-psychological factors (Sharma et al. 1995; McCraken, 1986; Bhardwaj et al. 2007),
- political factors (Pullman et al. 1997);
- economic factors (Vida and Fairhurst, 1999) and
- demographic factors (Balabanis et al. 2001; Hsieh et al. 2004; Witkowski, 1998).

Empirical results with respect to the importance of the various groups of antecedents have been mixed and hardly conclusive. As for the outcomes, however, a positive correlation between CE and consumer preference for domestic products has been proved.

2.4 The consumer ideologies' perspective

There is a large body of evidence that the ideological elements of consumer preference formation, be it for products or stores, also work independently, i.e. not merely as antecedents to normative behaviour such as CE. Ideological influences add an emotional or affective dimension to consumer preference formation. (Dmitrovic & Vida, 2010)

In the context of domestic versus foreign products/providers, affective influences may imply constructs such as consumer patriotism, consumer cosmopolitanism, and consumer animosity or country attachment.

In one of the first related research articles, Han (1988) found that patriotic emotions played a significant role in consumers' choice of domestic versus foreign products:

Although our considerable knowledge about consumer choice between domestic products may be extended to understanding the choice between domestic and foreign products, affective factors may play a more important role in the latter choice than the former choice. (p. 31)

Still on the positive side of affective influences, Verlegh (2007) found that national identification had influences on its own, i.e. irrespective of CE effects consumers' preference for domestic products or retailers. Conversely, individual aspirations for status-enhancing benefits of foreign products may shape preference for foreign products or providers, especially at lower stages of home country development. (Batra et al. 2000) In a parallel manner, consumer cosmopolitanism has gained increasing attention as a potentially relevant factor explaining foreign product or provider preference. (Riefler & Diamantopoulos, 2009)

On the negative side of affective influences, consumer animosity, i.e. feelings toward current or former enemies, has been found to affect consumers' willingness to buy products originating from a country, or by logical extension, to buy from retailers associated with that country. (Ang et al. 2004; Riefler & Diamantopoulos 2007)

2.5 The institutional perspective

As concerns our specific focus, institutional theory can be condensed to a framework that identifies social actors such as international retailers, who adhere to and in part influence institutional norms (which can be economic or societal) in order to secure legitimacy and support, such as unbiased store patronage, from other social actors such are consumers. (Pioch et al. 2009) Experimental results have demonstrated if institutional performance falls below the minimum acceptable level (as defined by the stakeholders) of institutional actions in the given environment, then the effectiveness of the firm will suffer and its survival may be endangered. (Zarkada-Fraser & Fraser, 2002)

From a retailer's perspective, institutional norms address most of what it can and must not do in a specific environment. If it conforms with the prevailing norms, or if it shapes them in a way that is well received by the respective environment, it will be rewarded by praise, recommendation and store patronage. In short, conformity with prevailing institutional norms or norms-to-be boils down to legitimacy.

Legitimacy consists of economic and social elements. Economic legitimacy has to do with the proper satisfaction of needs; i.e., with assortment, quality and price. Social legitimacy is more complex: it implies (on the part of the international retailer)

- creating consistency with the behavioural, moral and religious norms, i.e. the culture of the given consumer community;
- gaining the support of other social actors such as government, municipality, pressure groups etc.;
- overcoming (or exploiting) the liability of foreignness. (Zaheer, 1995)

There is a link between norm adherence and store patronage as demonstrated by Pioch et al. (2009) analyzing the reasons why Wal-Mart had to exit the German market.

Economic legitimacy is of lessening importance for international retailers as consumer incomes and thus expectations converge across countries. Also, local retailers progressively incorporate the best practices of international retailers equalizing thus the playing field from an economic perspective. (de Mooij, 2000) This tendency makes it increasingly important to understand the constituent elements and the means and ways of gaining or losing social legitimacy in a foreign retail environment. Today, it is conventional wisdom under the institutional approach that the ability of international firms to gain legitimacy from relevant social actors by conforming to the salient institutional norms of their environments is a (if not the) key success factor in retail internationalisation. (Bianchi & Arnold, 2004)

Chapter 3

Hypothesis development and methodology

Our key research question is the following: can politics-induced ‘buy national’ or rather, ‘buy from nationals’ campaigns successfully influence consumer behaviour? The question should be moderated by adding: ‘under normal circumstances’ since inter-national or inter-ethnic conflicts, war-time animosity etc. can, of course, change consumer attitudes and behaviour in an abrupt manner. A good recent example is when in the wake of the Palestinian uprising, religious leaders called for an eventually successful boycott of Sainsbury in Egypt, spreading the rumour that it was Jewish-owned and supported Israel financially. (El-Amir & Burt 2008) Another caveat is “in a small, open economy” since the high import share relative to GDP inevitably dooms product-based ‘buy national’ efforts: Hungary with its 66% imports/GDP share is among the top 50 most import-intensive economies of the world. (http://www.nationmaster.com) The ‘economy’ could also be complemented with the ‘transition’ adjective as it is understood that “consumer behaviour in these countries is undergoing a major transformation as economies move towards a market and politics move towards a democracy”. (Good & Huddleston, 1995, p35)

The theme could thus be rephrased by asking to what extent, in normal circumstances, ‘foreignness’ matters to consumers in a retail context in a small, open, transition economy? Is the foreignness of retailers recognized? Or, referring to Samiee et al.’s ‘brand origin recognition accuracy’ (BORA) (2005), is the consumers’ RORA (retailer origin recognition accuracy) at a level that makes a difference? How does consumer receptiveness (Alexander at al. 2010) fare relative to the (non/mis)recognition of foreignness? What are the antecedents to consumer receptiveness? From the interacting rational, normative and affective processes of consumer preference formation which emerges as prevalent? How does declared receptiveness or the lack of it relate to shopping behaviour?

Answers to these questions go with a number of implications. If the level of RORA is low and the country of association perception is mixed up, consumer acceptance of retailers will have little to do with foreignness. In such a case, a ‘buy from nationals’ campaign must have a sizeable educational and awareness-building content. If RORA is high, there is a wide room for raising sentiments against foreign retailers, provided that cultural antecedents of consumer attitudes carry more weight than market- or product-specific attributes. Even if, however, RORA is high and pro-national propaganda has significant influence on consumers’ beliefs, consumers may still claim certain preferences meanwhile doing something entirely different. Retailers’ options are also manifold. Depending on the intensity of consumers’ opposition (weakened acceptance), foreign retailers may try to de-emphasize their foreignness whereas domestic retailers may do their utmost to avoid consumer perceptions of their eventual international associations. Or, if artificially raised ethnocentricity is mere lip service on the part of consumers, international retailers may choose to do nothing but enhance consumer loyalty in the context of store and product-specific attributes.

The conceptual model applied will be drawing on concrete conceptual antecedents as follows:

- the theoretical model of Alexander et al. (2010) on consumer perception of country of origin against consumer receptiveness;
- the differentiation made by Vida and Reardon (2008) as well as by Dmitrovic and Vida (2010) with respect to the cognitive, affective and normative mechanisms in consumer preference formation for domestic versus imported products;

- the recognition that grocery retailing in Europe is dominated by economic norms, i.e. that for grocery shopping, consumers prioritise convenience (of access) as Arnold's (2004) results and Fernie and Pioch's (2006) data suggest, followed by value prices, merchandise selection, quality and discounting attractiveness (Pioch et al. 2009);
- the differentiation made by Anić (2010) with respect to store preference (retailer of first choice) and average monthly spending at favourite store (in percentage of respective monthly retail spending) as predictors for perceived consumer retailer preference and actual shopping behaviour, respectively.

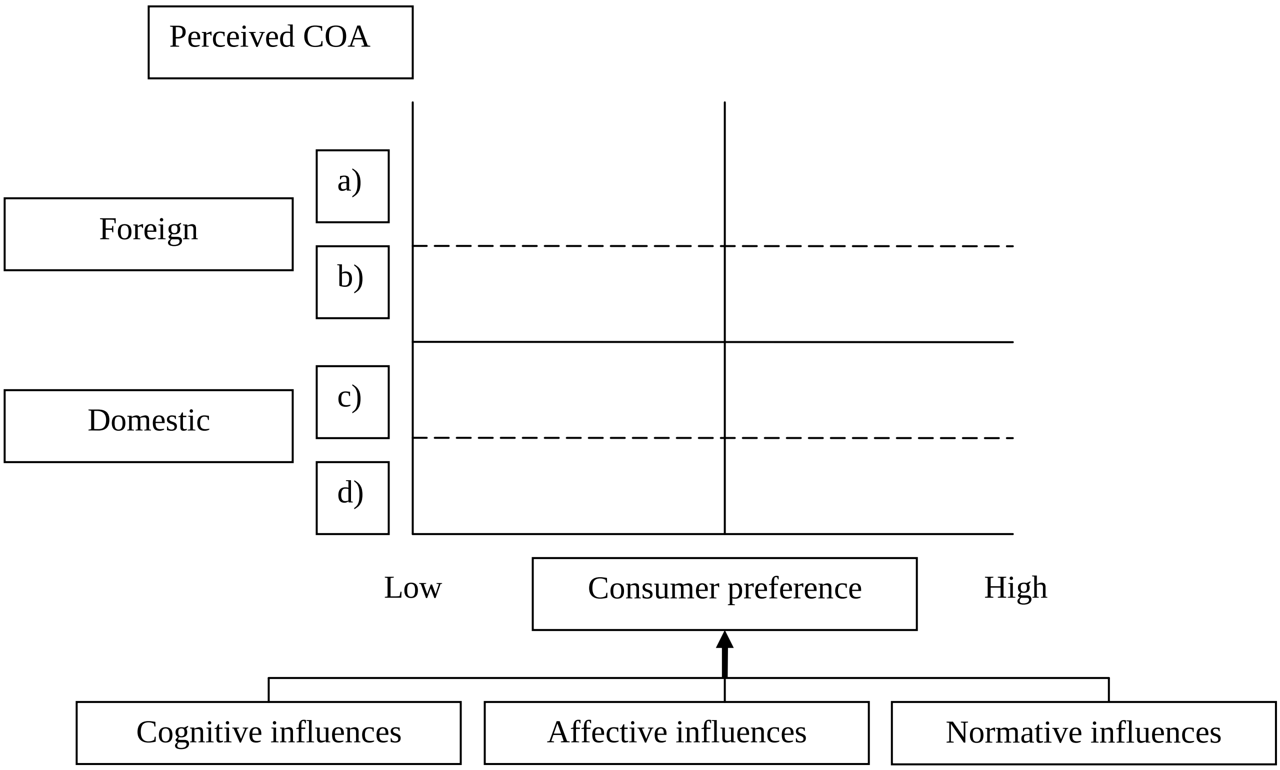

Figure 1 – Conceptual framework for the study

where

COA = country of association and

a) foreign retailer's country of origin distinctly recognized

b) foreign retailer's foreignness recognized

c) domestic retailer perceived as foreign

d) domestic retailer recognized as domestic.

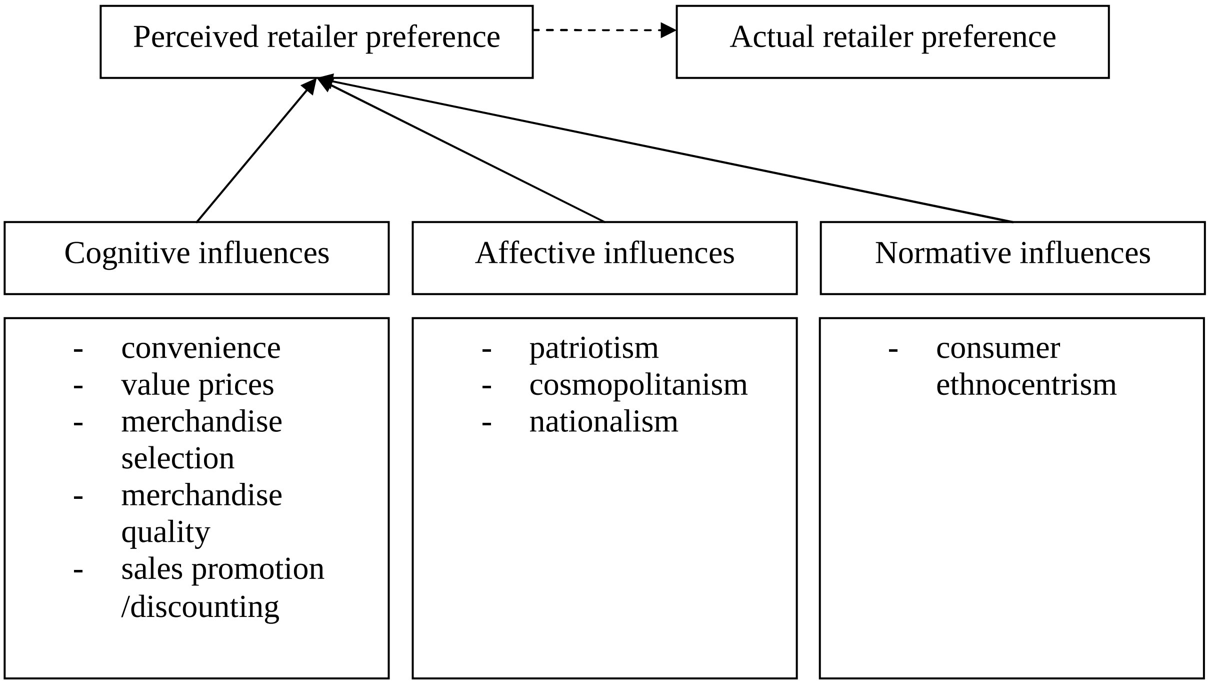

Figure 2 – Conceptual framework for consumer retailer preference

3.1 Hypotheses development

Our research hypotheses were elaborated relying on the above conceptual framework.

(**H1**) Consumers know who is who, or rather, they know who is from where. Controlled for demographics, however, urban and higher educated consumers have a better awareness of the country of origin of retailers than does the rest.

This is an under-researched issue relative to product brand awareness (Samiee et al. 2005; Balabanis and Diamantopoulos 2008; Pappu et al. 2006; Lim & O'Cass 2001; Zhou et al. 2010). Consumer attitudes towards incoming or incumbent international retailers have hardly been researched. (Alexander et al. 2010) Notable exceptions are Chaney and Gamble (2008) studying retail store ownership influences on Chinese consumers, Seock and Lin (2011) researching cultural influence on store attribute evaluation, Mc Kenzie (2004) offering insights on retailer COO effects in Estonia and Zarkada-Fraser and Fraser (2002) investigating store patronage predictions for foreign-owned supermarkets. Nevertheless, even these sporadic efforts failed to consider (or took for granted) the level of ROCA, i.e. the reliability of consumer recognition of the country of origin or at least, the country of association of retailers.

(**H2**) Consumers may not be aware of the exact country of origin of a retail chain but can differentiate between domestic and foreign associations of origin fairly reliably, irrespective of demographics.

This is a hypothesis relying on mere commonsense. As for ROCA, there are three options (Alexander et al. 2010): a retailer's COO can be distinctly recognized, its COA, i.e. country of association, or rather its foreignness/Hungarianness can be recognized or its origin can be totally misplaced (foreign for Hungarian and vice versa) or not known. It is posited that there are much more consumers who recognize a Hungarian retailer for what it is or an international retailer as foreign than those who have no idea or mistake a foreign retailer for Hungarian or vice versa.

(**H3**) Consumers who pledge to prefer one of the domestic chains to foreign chains know who is domestic and who is not better than do consumers whose first-best choice is one of the foreign chains, irrespective of demographics.

The implied assumption is that a domestic consumer bias is based on knowledge, at least on more or better knowledge in terms of COO or COA than the lack of such bias. Were it not the case, preference for domestic retailers would simply be a culturally motivated lip service without much consequence in terms of actual consumer behaviour.

(**H4**) Consumers who pledge to prefer one of the domestic chains to foreign chains do indeed satisfy most of their daily needs from their (domestic) chain of preference.

Researchers have defined retail patronage behaviour in various ways (Pan and Zinkhan 2006). To be sure, however, patronage behaviour can be regarded as the purchase behaviour of the consumer to one or another particular store (Anić 2010). Money spent at the allegedly favourite retailer (domestic or foreign) must be significant relative to all spending on the respective product group (food and FMCG) by the consumer. What is considered significant is, naturally, open to interpretation.

(**H5**) Consumer perceptions of convenience of access, price, merchandise selection, quality and attractive discounting practices positively correlate with overall consumer preference for domestic versus foreign retailers. That is, consumers who claim Hungarian owned chains superior to foreign chains on cognitive grounds are by far more likely to name Hungarian-owned stores as their general choice of heart, and vice versa.

This position simply reflects the view that environment- and merchandise-related store attributes are as important in store patronage formation in Hungary as they have been found to be in other countries (Seock and Lin 2011). According to AC Nielsen surveys (http://hu.nielsen.com) for Hungarian consumers 'value for money' is the most important consideration, followed by merchandise quality and assortment and convenience of access.

The 'value for money' consideration was found to be affected mostly by sales promotions, reputation (of being cheaper than competitors) and comparative window shopping.

	Hungary		*European average*	
Attribute	**Important**	**Not important**	**Important**	**Not important**
Value for money	87	2	87	3
High quality and wide merchandise assortment	64	16	54	17
Convenience of access	45	24	51	21
Convenience of parking	34	42	46	31

Table 2 – Importance of store attributes in patronage decisions in percentage of respondents

Source: AC Nielsen Hungary, http://hu.nielsen.com

	Hungary		*European average*	
Attribute	**Important**	**Not important**	**Important**	**Not important**
Price promotion through leaflets	66	11	62	14
Reputation of being cheaper than competitors	59	13	63	11
Comparative window shopping	58	19	55	20
Lots of promotions and discounts	53	19	72	9
Promise of everyday low prices	43	25	52	18
Lots of retailer brands	39	28	65	12
Friends' recommendation	39	29	41	25

Table 3 – Attributes influencing value for money evaluations in percentage of respondents

Source: AC Nielsen Hungary, http://hu.nielsen.com

Over and beyond the relative importance of store attributes, this hypothesis also implies that cognitive/rational factors account for store patronage formation decisively also in terms of preference for domestic versus foreign owned retailers.

(**H6**) Consumer beliefs such as patriotism, cosmopolitanism, nationalism or ethnocentricity can be differentiated. If so, do patriotic consumers form a distinct cluster as against nationalist, cosmopolitan or ethnocentric consumers and vice versa in any other combination? Or, do consumers profess such a mixed set of affective and normative values that they are not distinguishable for any practical purpose?

Constructs such as patriotism, cosmopolitanism, nationalism and CE have been validated in their influence on consumer behaviour extensively (Han, 1988, Cleveland et al. 2009; Vassella et al. 2010; Dmitrovic et al. 2009; Rybina et al. 2010; Riefler and Diamantopoulos 2009; Balabanis et al. 2001; Dmitrovic and Vida 2010, to name just a few, and not reiterating here the extensive literature of consumer ethnocentricity). The respective constructs have been measured as antecedents to CE or on their own, influencing consumer preference formation parallel to or independently from CE.

(**H7**) If the former, consumer patriotism, nationalism and ethnocentrism, although to varying degrees but positively correlate with consumer preference formation for domestic retailers whereas consumer cosmopolitanism positively correlates with preference for foreign retailers.

CE can be fuelled by nationalism and/or patriotism and mitigated by cosmopolitanism (Balabanis et al. 2001). Or, CE and affective dimensions can have a combined effect, together with rational attributes, on consumer attitudes, intentions and, in the end of the day, behaviour (Dmitrovic and Vida 2010).

(**H8**) In all, controlling for certain demographics and the resulting ROCA (recognition of country of association), cognitive, affective and normative consumer beliefs determine preference for domestic versus foreign retailers to a (statistically) significant degree.

Objective retailer attributes such as price, access, variety, quality etc. matter most when one considers preference formation for domestic versus foreign retailers. However, the degree of one's in-group (as opposed to out-group) identification (patriotism/nationalism versus cosmopolitanism) and the affect of influential others' points of view on one's intentions (such as CE) may significantly influence discriminatory behaviour. (Fishbein and Ajzen 1980; Lanz and Loeb 1996; Dmitrovic and Vida 2010)

3.2 Data collection and the sample

The data collection process was outsourced to an established, high-reputation public opinion research firm in Hungary, Ipsos Zrt (www.ipsos.hu). The company is a 100% subsidiary of the French Ipsos S.A., and is a member of the European Society for Opinion and Marketing Research, adhering to the research codes and guidelines of this organisation. Data were collected through the internet between June 29 and July 4, 2011.

Data collection relied on Ipsos's online panel. This database contains 60,000 persons who pledged to fill in the online questionnaires that are made available for them. In our case, questions were sent out to 3,000 persons and a more than 20% return rate was achieved: in all, we had 619 valid responses. Since we wished to reach not only internet users but a sample representing the general population, special effort was made to acquire respondents from social strata with lower internet penetration. The demographics of the 3,000 potential respondents were made to conform to the demographics of the general Hungarian population. Obviously, different demographics were displayed by the 619 actual respondents as women, higher educated as well as elderly people were, as a rule, more willing to return questionnaires than men, lower educated and younger people. Ipsos used an iterative proportional stratification and weighting technique to reproduce in our sample the demographic structure and features of the general population.

Table 4 shows the relative sampling error in the case of percentage distributions, i.e., frequencies at 95% confidence level provided that the population is the general Hungarian adult (over 18) population.

	Frequencies				
Sample size (N)	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
650	2,8%	3,1%	2,4%	3,6%	3,9%
500	2,7%	3,6%	4,1%	4,4%	4,5%
250	3,9%	5,2%	5,9%	6,3%	6,4%
100	6,4%	8,4%	9,5%	10,1%	10,3%

Table 4 – Relative sampling error in the case of percentage distributions at 95% confidence level

It follows that given the sample size the frequencies received in our research may diverge by maximum +/- 4 percentage points from those that would have been received if all adult people in Hungary had been asked.

Our sample characteristics conform to those published by the micro-census made by Hungarian Central Statistical Office in 2005.

Gender	
male	47%
female	53%
Age group	
18-29	22%
30-39	18%
40-49	16%
50-59	18%
Over 60	24%
Highest education	
Elementary (≥8 yrs)	36%
skilled blue-collar (= 10 yrs)	21%
high school (= 12 yrs)	29%
undergraduate (bachelor) and over (≥15 yrs)	24%
Residence	
Budapest	18%
major city (county capital)	18%
other urban	33%
rural	31%
Household income, monthly, net	
≤HUF 110.000	41%
≤HUF 200.000	35%
≤HUF 300.000	17%
≤HUF 500.000	5%
≥HUF 500.001	2%

Table 5 - Sample Characteristics

Source: http://www.mikrocenzus.hu

The questionnaire we used contained 15 closed questions. Appendix 2 contains all the questions together with summary distributions in per cent. Most questions were self-explanatory. Control questions were used to test responses to key questions such as "Taking an average weekday, the store of which retail chain you find the most conveniently accessible?" (Q2) or "Thinking of regular 'grand' shopping trips, the store of which retail chain you find the most conveniently accessible?" (Q5). The measures for affective/normative constructs were drawn from the literature, translated into Hungarian by the authors, and tested on a small informal sample in terms intelligibility and clarity before inclusion in the questionnaire. All scale items were measured on a 5-point Likert-scale (1 = strongly disagree, 5 = strongly agree). Respondents were asked to mark their attitudes with respect to the 22 affective/normative statements (see Q15 in Appendix 2) that were listed without reference to any of the implied constructs, i.e. patriotism, cosmopolitanism, nationalism and consumer ethnocentricity.

Patriotism was intended to be measured through an 8-item scale that combined multi-item scales developed by Ruyter et al. (1998), Keillor et al. (1999) and Dmitrovic et al. (2009). It was understood that the scale developed from items drawn from various authors must undergo a rigorous reliability test. The scale included items such as "I am proud to be Hungarian" or "Hungary has a rich and unique historical heritage".

Cosmopolitanism was interpreted as a mix of dimensions such as open-mindedness and diversity appreciation (Riefler & Diamantopoulos 2009) and was meant to be measured on a 4-item scale drawn from Riefler & Diamantopoulos (2009) and Dmitrovic et al. (2009). It tested statements such as "I like to have contact with people from different cultures" or "I like immersing myself in different cultural environments".

The nationalism construct was based on Todosijevic's (2001) deliberations. The 4-item scale adopted reflects beliefs and attitudes that can be best described either as extremely close identification with the nation or rather an ethnic group ("One's most important characteristics come from his nationality") or as demands for discriminative rights ("Putting our nation above others is nothing evil; it is just an expression of love for our people").

Consumer ehnocentricity is one of the most widely measured constructs in retail literature as from Shimp and Sharma's first try in 1987. The international validity of the original 17-item CETSCALE, developed for the U.S., was confirmed by several studies such as Durvasula et al. (1997), Hult et al. (1999), Good and Huddleston (1995) and Luque-Martinez et al.(2000). Similarly good results have been achieved with a 10-item subset (e.g. Steenkamp and Baumgartner 1998). Given the reflective rather than formative nature of these scales (Diamantopoulos 2008), the use of further reduced versions of the scale was deemed appropriate. For parsimony, this survey used a 6-item scale where items were chosen from scales used and proven in the Central and East European region. The selected items embraced apparently rational ("Hungarians should not buy foreign products because this hurts Hungarian business and causes unemployment") as well as emotional ("A real Hungarian should always buy Hungarian-made products") dimensions.

Data gathered from the survey were analyzed using IBM's Statistical Package for Social Science program. The data analysis consisted of crosstabulations, bivariate correlation analyses, internal consistency assessment in the case of multi-item scales as well as principle components method of exploratory factor analysis with varimax rotation for testing the affective/normative constructs.

CHAPTER 4

RESEARCH FINDINGS AND HYPOTHESES TESTING

4.1 Recognition of retailer country of association

Respondents were asked to select the country of origin of the named 13 retailers from a list of countries that contained all the six origin countries, including Hungary. Answers were then recoded into four categories as follows (See Table 6):

- does not respond/does not know
- knows correctly
- classifies a foreigner (i.e. foreign owned chain) as Hungarian or vice versa
- knows the foreignness of a foreigner.

It is hardly surprising that the largest Hungarian owned chain (CBA) had a nearly 70% recognition rate in terms of its country of origin. In contrast, right answers for foreign owned chains accounted for less than 30%. To be fair, however, this rate would have been over 36% without the Louis Delhaize Group (Cora, Profi, Match) whose Belgian firm registration few respondents could successfully guess. Nevertheless, even so, more than 50% of respondents could make a difference between foreign and Hungarian retailers even if they knew but the foreignness of one or another foreign owned chain. More than 70% of respondents were aware of Lidl’s foreignness, and their majority (59%) knew explicitly of the chain’s German origin. The other highly recognized foreign retailer was Tesco with respective shares of 63% and 52%. The Louis Delhaize Group notwithstanding, the least recognized large foreign provider was Metro which a relatively high percentage of respondents (12%) guessed Hungarian just like Rewe’s Penny Markets.

Retailers in alphabetical order	**No response/ doesn't know**	**Knows rightly**	**Classifies foreigner as Hungarian or vice versa**	**Knows foreign-ness of foreigner**	**Total**
Aldi	34,2	43,6	2,1	20,1	100,0
Auchan	39,0	37,5	2,1	21,4	100,0
CBA	*23,7*	*68,7*	*7,6*	-	*100,0*
Coop	*23,7*	*68,7*	*7,6*	-	*100,0*
Cora	54,4	5,3	5,5	34,8	100,0
Lidl	25,9	58,5	2,7	12,9	100,0
Match	54,2	3,4	5,2	37,2	100,0
Metro	48,5	17,9	12,3	21,3	100,0
Penny Market	38,1	26,0	11,2	24,7	100,0
Profi	57,7	1,3	21,1	19,9	100,0
Reál	*40,0*	*48,2*	*11,8*	-	*100,0*
Spar/Interspar	38,7	17,1	7,9	36,3	100,0
Tesco	31,3	51,5	5,7	11,5	100,0
Total	**39,2**	**34,4**	**7,9**	**18,5**	**100,0**
Totals for Hungarian owned chains	*29,1*	*61,9*	*9,0*	-	*100,0*
Totals for foreign owned chains	42,2	26,2	7,6	24,0	100,0

Table 6 – Country of association summary*

*Hungarian owned retailer in italics.

Taking Alexander et al.'s (2010) classification, our Hungarian sample performed as follows:

a) foreign retailer's country of origin distinctly recognized = 26%

b) foreign retailer's foreignness recognized = 24%

c) domestic retailer perceived as foreign = 9%

d) domestic retailer recognized as domestic = 62%

The above 4-category variables were then further simplified into 2-category variables which showed whether the respondent was or was not at all aware of the retailer's Hungarianness or foreignness. These summary variables were then controlled for demographics, with hardly surprising results. In general, higher educated and higher income men could associate a retailer with its country of origin more reliably than others.

	Pearson R	Approx. T*	Approx. sig.
Education level	0,292	7,570	0,000
Household income	0,152	3,843	0,000
Gender**	-0,161	-4,570	0,000

*Using the asymptotic standard error assuming the null hypothesis.
** 1= male, 2 = female.

Table 7 - Relationship between COO correctness and demographics

We also checked the country of origin recognition for the two major players, i.e. the Hungarian owned CBA and Tesco. The consistency was surprising: once again, higher educated and higher income (though here the covariance with education level did matter), urban men were found to be able to guess the country of origin or at least, the Hungarianness versus foreignness of retailers much better than the rest.

	Pearson R		Approx. T*		Approx. Sig.	
	CBA	Tesco	CBA	Tesco	CBA	Tesco
Education level	0,262	0,265	6,733	6,818	0,000	0,000
Household income	0,124	0,120	3,109	2,995	0,002	0,003
Gender	-1,333	-0,131	-3,330	-3,271	0,001	0,001
Residence**	0,157	0,210	3,943	5,324	0,000	0,000

*Using the asymptotic standard error assuming the null hypothesis.
**1= rural, 2= urban

Table 8 - Relationship between COO correctness and demographics for CBA and Tesco

The ROCA, i.e. recognition of country of association variable was found to correlate significantly (Pearson's r = -0,181, Spearmann's rho = -0,211, both with sig. (2-tailed) = 0,000) with overall store preference in terms of domestic versus foreign-owned chains. Since in the ROCA 1 = no or wrong knowledge and 2 = right answer or at least right guess of foreignness, this negative correlation means that those whose choice of heart was one or another Hungarian-owned chain knew who was who, or rather who was from where somewhat better than those who preferred foreign-owned retailers.

4.2 Retailer preferences from various perspectives

Store preference, or more precisely, preference for domestic versus foreign owned retailers was approached from various perspectives.

Respondents were asked

1. which supermarket they found most convenient in terms of their daily routines,
2. whether they indeed did shopping in this most conveniently accessible store on a daily basis, or if not, why not,
3. which retailer they found most convenient in terms of their regular weekly, bi-weekly etc. 'grand shopping' tours,
4. whether they indeed did shopping at the store of this most conveniently accessible retailer, or if not, why not,
5. which retailer was their choice of heart (i.e., if they could they would always do shopping there),
6. how much they spent in the store of their best preferred retailer in the last month.

Control questions 2. and 4. proved their purpose but were found to be superfluous: 84% of respondents did indeed do their shopping in the store they claimed most convenient from the viewpoint of their daily routines. (‘Diversion’ was due mostly to farmers’ markets.) Even more respondents, i.e. 92% did ‘grand shopping’ trips to the hyper/supermarket that they claimed to be most conveniently accessible. Table 9 compares the percentage distribution of choices with regard to questions 1., 3. and 5.

Retailers in alphabetical order	**Daily preference**	**Grand shopping preference**	**Choice of heart**
Aldi	1	1	1
Auchan	6	15	17
CBA	12	2	11
Coop	20	6	6
Cora	1	3	6
Lidl	17	11	13
Match	1		0
Metro	1	1	1
Penny Market	6	6	3
Profi	1	1	
Reál	5	1	1
Spar/Interspar	14	13	14
Tesco	16	41	26
Domestic store preference	*37*	*8*	*19*
Foreign store preference	63	92	81

Table 9 - Store preference distributions (%)

In most of the cases, the choice of heart fell, as expected, between the other two preference ratings, or at least equalled with one of them, i.e. and more precisely, the share of respondents claiming one retailer as his/her choice of heart was between the proportions of those who claimed the same retailer their daily or ‘grand shopping’ preference. There are two notable exceptions. One is Coop, the second-largest Hungarian chain: 20% of respondents said that it was their daily choice of convenience as against only 6% making it their choice of heart. Clearly, because of its extensive network (5,300 stores nation-wide), Coop, together with CBA is used as a drop-in food and convenience store but hardly as a target for weekly or monthly 'grand shopping' visits. The other exception is Auchan which is apparently more liked than used: it has only 12 hypermarkets in Hungary (before buying up Cora stores in 2012), and as such, it can for many be more of an object of desire than a relationship. This notwithstanding, the choice of heart preference scale appears to be usable as a generic indicator of store patronage (especially in terms of domestic versus foreign preferences) whereas the 'daily preference' variable may be a fair indicator of the convenience of access (one of the cognitive factors).

In contrast, the measure of actual relative spending at the choice of heart retailer must be treated with caution. Relative spending ratios were calculated from two variables: spending in favourite supermarket last month and the respondents' total spending on food and FMCG in the last calendar month. Out of 619 potential responses, 263 were missing or must have been deleted because they were either 0% or over 100%. This in itself shows that many respondents might have not understood or misinterpreted these questions. Furthermore, as for the remaining cases one would have expected something of a normal distribution. Instead, more than 30% of remaining respondents said to spend his/her total monthly budget at the choice of heart store which seemed unlikely from a practical perspective. This finding coincides with that of Anić (2010:p.127) who concludes that "consumers who prefer domestic retailers do not spend significantly more money at their favourite stores than consumers who prefer foreign retailers or indifferent consumers".

		Daily convenience	Weekly, monthly etc shopping trip convenience	Choice of heart	Share of last month's spending at choice of heart store in monthly total spending
Daily convenience	Pearson Correlation	1	0,279	0,144	-0,148
	Sig. (2-tailed)		0,000	0,000	0,001
	N	619	619	619	475
Weekly, monthly etc shopping trip convenience	Pearson Correlation	0,279	1	0,376	-0,048
	Sig. (2-tailed)	0,000		0,000	0,299
	N	619	619	619	475
Choice of heart	Pearson Correlation	0,144	0,376	1	0,256
	Sig. (2-tailed)	0,000	0,000		0,000
	N	619	619	619	475
Share of last month's spending at choice of heart store in monthly total spending	Pearson Correlation	-0,148	-0,048	0,256	1
	Sig. (2-tailed)	0,001	0,299	0,000	
	N	475	475	475	475

Table 10 - Cross-correlations of store preference measures

4.3 Cognitive/rational influences on retailer preference formation

Respondents were asked to mark the retail chain they found most preferable in terms of cognitive factors such as convenience of access (with regard to the individually most accessible store of the chain), price, merchandise, quality and discounting attractiveness.

Again, just as with country-of-association testing, supermarkets were listed in alphabetical order, i.e. without any reference to their country of origin.

First, the respective variables were recoded to show preference for domestic versus foreign-owned stores in terms of convenience, price, merchandise, quality and discounting. Reliability analysis resulted in a Cronbach's alpha of 0,768 (4 items) which confirmed that the respective variables can be used in a scale format.

The frequencies of mentions per supermarket were sharply divergent. (See Table 11.) Clearly, foreign-owned supermarkets were much preferred to their Hungarian-owned counterparts: nearly 72% of the respondents did not claim Hungarian chains superior to foreign-owned stores on any count whereas the reverse figure was merely 1.2%. In contrast, 54% of respondents opined that foreign stores were superior to Hungarian ones on all respective counts.

Demographics did not appear to affect the cognitive preferences with the exception of age with respect to foreign stores (Pearson's R = 0,129, sig.(2-tailed) = 0,001) and education as for domestic chains (Pearson's R = -0,177, sig.(2-tailed)= 0,000).

As for the individual scores, Tesco was found superior to the others on all counts but convenience of access and quality. Spar/Interspar was deemed to be of the highest quality from the available variety. The two Hungarian chains, Coop in particular, excelled only in terms of convenient accessibility. (See Table 12.)

	Number of mentions out of 5, valid percent						
Stores	0	1	2	3	4	5	Total
Aldi	95,8	2,6	1,4	0,2	0,0	0,0	100,0
Auchan	66,7	13,3	5,2	7,3	3,9	3,6	100,0
CBA	84,8	10,1	3,6	0,9	0,4	0,1	100,0
Coop	87,9	8,8	0,3	1,9	0,4	0,7	100,0
Cora	86,7	8,4	2,9	0,9	0,6	0,4	100,0
Lidl	70,3	18,4	2,8	2,9	3,0	2,6	100,0
Match	99,6	0,4	0,0	0,0	0,0	0,0	100,0
Metro	90,6	7,8	1,2	0,0	0,1	0,2	100,0
Penny	80,2	12,6	5,2	1,1	0,7	0,2	100,0
Profi	99,1	0,5	0,4	0,0	0,0	0,0	100,0
Reál	98,3	1,4	0,2	0,1	0,0	0,0	100,0
Spar/Interspar	65,1	19,6	9,7	1,3	3,8	0,5	100,0
Tesco	34,2	25,8	14,5	16,5	3,5	5,5	100,0
Stores, domestic	*71,5*	*19,5*	*4,2*	*3,1*	*0,8*	*0,8*	*100,0*
Stores, foreign	1,2	2,9	6,8	12,2	23,1	53,8	100,0

Table 11 - Stores' scores in terms of convenience, price, merchandise, quality and discounting

Stores	**Convenience of access**	**Price**	**Merchandise**	**Quality**	**Discounting**
Aldi	1,1	2,4	1,4	1,3	0,8
Auchan	5,8	14,4	25,0	13,8	18,0
CBA	11,7	6,7	1,2	10,4	4,6
Coop	20,2	4,6	3,0	5,4	3,4
Cora	1,1	1,4	10,9	5,8	2,9
Lidl	17,2	19,8	5,9	11,8	13,7
Match	0,6	0,0	0,4	0,0	0,0
Metro	0,5	2,8	6,6	2,0	0,7
Penny	6,2	17,9	0,8	2,0	6,1
Profi	1,1	0,3	0,0	0,0	0,5
Reál	4,7	0,4	0,1	0,9	0,2
Spar/Interspar	14,1	1,5	10,4	32,3	9,8
Tesco	15,7	27,7	34,4	14,3	39,4
	100,0	100,0	100,0	100,0	100,0

Table 12 – Ranking of retailers in terms of major cognitive factors (in valid percentage)

The examination of bivariate correlation between cognitive preferences for domestic versus foreign retailers and overall store preferences gave unsurprising and therefore, highly reassuring results. Overall preference for domestic stores correlated significantly, strongly and negatively (since 1=domestic, 2=foreign) with preference expressed for domestic supermarkets on cognitive grounds, and vice versa: overall preference for foreign stores correlated significantly, strongly and positively with preference expressed for foreign supermarkets on cognitive grounds.

	Correlation coefficients		
	Pearson's r	**Gamma**	**Spearmann's rho**
Cognitive preference for domestic providers	-0,561	-0,802	-0,491
Cognitive preference for foreign providers	0,531	0,782	0,492

Table 13 - Correlation* between cognitive preference scales and overall store preference

*All correlations are significant at the 0,000 level (2-tailed)

Cross-checking cognitive preference scales with actual spending share in the favourite domestic versus foreign supermarket, had no results, or rather, no relationship was found.

4.4 Affective/normative influences on retailer preference formation

For a start, we checked the reliability of the respective scales through establishing Cronbach's alphas. Through measuring inter-item correlation between individual items and the summated scale average, also a first measure of the importance of the individual items could be seen.

	Cronbach's α	Cronbach's α based on standardized items	Number of items
Patriotism	0,903	0,906	8
Cosmopolitanism	0,661	0,677	4
Nationalism	0,768	0,770	4
Ethnocentrism	0,893	0,893	6

Table 14 – Internal consistency of presumed affective/normative scales

Although item numbers were not excessive which increased the usability of Cronbach's alpha, the measure for the cosmopolitanism construct failed to reach the 0.7 threshold that is considered the minimum degree of internal scale consistency even in preliminary research. (Kent 2007, p.143)

Scale statistics	Mean of scores	Standard deviation	Correlation with summated scale average
Patriotism summated	**4,131**	**0,843**	**1,000**
Loyalty to their homeland can be expected from all decent people.	3,824	1,243	0,714
It means a lot to me that I was born Hungarian.	4,055	1,164	0,882
I am proud to be Hungarian.	4,262	1,077	0,876
I find it personally flattering when a foreigner speaks favourably of Hungary.	4,442	0,894	0,741
I am strongly attached to my Hungarian homeland.	4,163	1,157	0,838
Hungarians should be proud of their Hungarianness.	4,229	1,060	0,836
Hungary has a rich and unique historical heritage.	4,240	0,974	0,760
The great personalities of Hungarian history and science are respected all over the world.	3,837	1,128	0,555
Cosmopolitanism summated	**3,813**	**0,751**	**1,000**
I like immersing myself in different cultural environments.	3,512	1,085	0,811
I like to have contact with people from different cultures.	4,172	0,857	0,660
I'd love to spend some extended time abroad.	3,429	1,269	0,665
I enjoy getting news from all over the world.	4,137	1,015	0,703
Nationalism summated	**3,781**	**0,899**	**1,000**
Renewal of our national cohesion is our most important task.	3,736	1,234	0,828
One’s most important characteristics come from his nationality.	3,820	1,210	0,798
Putting our nation above others is nothing evil; it is just an expression of love for our people.	3,363	1,249	0,742
One must respect his nation and his national traditions.	4,205	0,969	0,706
Ethnocentrism summated	**3,480**	**1,042**	**1,000**
It is not right to purchase foreign products.	2,755	1,276	0,811
We should purchase products manufactured in Hungary instead of letting others to get rich on us.	4,008	1,228	0,827
Hungarians should not buy foreign products because this hurts Hungarian business and causes unemployment.	3,455	1,344	0,882
We should import only those goods that we cannot obtain within our own country.	3,669	1,239	0,780
I prefer Hungarian products even if it may cost me more on the long run.	3,303	1,321	0,792
A real Hungarian should always buy Hungarian-made products.	3,689	1,335	0,748

Table 15 – Descriptive statistics of patriotism, cosmopolitanism, nationalism and CE scales

Table 15 permits some interesting findings. By far the least controversial statement suggested that respondents found it flattering when foreigners spoke favourably of Hungary which tells a lot about the state of national self-consciousness. Statements reflecting positive emotional attachment (‘proudness’, richness of and respect for national heritage etc.) were also given high ratings together with openness toward other cultures. Interestingly, CE was most supported by the ‘envy-factor’, i.e., that Hungarians should buy Hungarian to prevent that others, i.e. foreigners get rich on them. The least supported statement was the ethical extreme with respect to the wrongness of buying foreign products.

Data in Table 15 also confirmed that the correlation of some items of the cosmopolitanism scale might not be convincing enough. Calculating Cronbach’s alpha with individual items deleted, one indeed found that having got rid of item “I’d love to spend some extended time abroad”, the alpha for the cosmopolitanism scale could be raised over 0.7 (0.706). Similarly, getting rid of item “The great personalities of Hungarian history and science are respected all over the world”, the alpha for the patriotism scale increased to a highly convincing 0.915.

However, taking into account Kent’s suggestion (2007, p144), i.e. “if researchers are concerned about dimensionality, then procedures like factor analysis are probably more appropriate” than Cronbach’s alpha, we used factor analysis both for purposes of data reduction, i.e. the removal of still redundant items, and structure detection.

Dimension reduction suggested that 3 items out of the 22 might be redundant, i.e. those the rotated matrix value (see Table 16) of which in none of the suggested components reached the arbitrarily chosen 0.55 level. These three items included the two arrived at through comparing Cronbach’s alphas with items deleted.

Deleting these three items and using a principal axis factors extraction, one could uncover three latent factors that described relationships between the variables which accounted for almost 66% of the variability in the original variables. (See Appendix 3 Table - Total variance explained) The KMO and Bartlett's tests both unequivocally indicated that the data were suitable for structure detection. (See Appendix 4 Table - KMO and Bartlett's test results)

	Factor		
	1	**2**	**3**
It means a lot to me that I was born Hungarian.	0,832	0,320	0,139
I am proud to be Hungarian.	0,813	0,299	0,071
I find it personally flattering when a foreigner speaks favourably of Hungary.	0,642	0,122	0,414
I am strongly attached to my Hungarian homeland.	0,763	0,245	0,145
Hungarians should be proud of their Hungarianness.	0,797	0,222	0,079
Hungary has a rich and unique historical heritage.	0,657	0,195	0,305
I like immersing myself in different cultural environments.	0,198	-0,006	0,711
I like to have contact with people from different cultures.	0,029	0,037	0,575
I enjoy getting news from all over the world.	0,337	0,020	0,679
Renewal of our national cohesion is our most important task.	0,410	0,613	0,082
One's most important characteristics come from his nationality.	0,684	0,313	0,134
Putting our nation above others is nothing evil; it is just an expression of love for our people.	0,254	0,630	-0,022
One must respect his nation and his national traditions.	0,641	0,189	0,125
It is not right to purchase foreign products.	0,172	0,764	0,140
We should purchase products manufactured in Hungary instead of letting others to get rich off us.	0,291	0,733	-0,142
Hungarians should not buy foreign products because this hurts Hungarian business and causes unemployment.	0,166	0,850	0,053
We should import only those goods that we cannot obtain within our own country.	0,143	0,695	0,041
I prefer Hungarian products even if it may cost me more on the long run.	0,167	0,742	0,036
A real Hungarian should always buy Hungarian-made products.	0,464	0,559	0,112

Table 16 - Rotated Factor Matrix of Affective and Normative Influences*

*Extraction Method: Principal Axis Factoring. Rotation Method: Varimax with Kaiser Normalization. Rotation converged in 6 iterations.

The three components generated by the principal axis factors extraction gave a slightly different picture than the one that had initially presumed that the affective and normative factors determining choice between domestic and foreign supermarkets could be best described by patriotic, cosmopolitan and nationalist attitudes on the one hand, and consumer ethnocentrism on the other. Apparently, **Factor 1** could be interpreted as comprising *romantic nationalists* who displayed strong patriotic feelings but could also easily subscribe to some discriminative nationalistic attitudes. They were romantic in the sense that their patriotism/nationalism had little to do with economic concerns of losing control of one's economic interests (Sharma et al. 1995). This was in sharp contract to **Factor 2** where alleged *economic nationalists* belonged. They revealed a high degree of consumer ethnocentricity in the sense of their unwillingness to buy imported products as well as their overall prejudice against foreign providers combined with strong, purely nationalistic or ethnocentric tendencies. Economic nationalists hardly shared beliefs which were crucially important for romantic nationalists such as sentimental attachment to the homeland, its heritage and traditions. However, items such "A real Hungarian should always buy Hungarian-made products" or "One's most important characteristics come from his nationality" bridged these two components. More separated was **Factor 3** that comprised *world-minded patriots*. They were consumer cosmopolitans who revealed little if any prejudice against buying foreign or buying from foreigners but were patriots in the sense of being proud of their homeland and their own attachment to it, especially if the outside world looked upon their country also positively.

The three scales were controlled for demographics. In the case of romantic patriotism, only the respondents' age groups were found to correlate with the summated scores; this correlation, however, albeit statistically significant, was very weak. Economic nationalism was found to correlate statistically significantly only with education and household income levels, i.e. lower education and income levels coincided with more pronounced attitudes, but the relationship was weak. Finally, world-minded patriotism showed weak but statistically significant correlation with all demographic indicators but gender.

It may follow from the above that it was only world-minded patriotism that was found to correlate significantly with ROCA, i.e. the better the recognition level (1= does not know or knows wrongly, 2= knows correctly or knows at least the foreignness of the foreign retailer) the more pronounced beliefs and attitudes were measured. However, Pearson correlation (significant at the 0.01 level) was 0.289, i.e. not high enough to permit far reaching conclusions.

Interesting, albeit largely inconclusive results could be arrived at when correlation between the individual affective/normative constructs and the overall store preference (1= preference for domestic store/chain, 2= preference for foreign-owned store/chain) was examined.

Scales	**Correlation coefficients**	
	Pearson	**Spearmann's rho**
Romantic nationalism	-0,161	-0,153
World-minded patriotism	not significant	not significant
Economic nationalism	-0,204	-0,192

Table 17 - Correlations* between affective/normative scales and overall store preference

*All correlations were significant at the 0,000 level (2-tailed)

As shown by Table 17, the relationships in view were weak but in conformity with the expected directions. It was the most pronounced in the case of economic nationalist (i.e., consumer ethnocentric) attitudes that respondents, when asked about their overall preference for domestic versus foreign supermarkets, leaned towards preferring domestic ones. Romantic nationalists also showed a similar, although even weaker tendency. World-minded patriotism, however, was unrelated to store preference: apparently, the respective attitudes left people free to choose based on attributes other than the country-of-association of store ownership.

For cross-checking purposes, correlation between affective and normative attitudes and the share of last month's spending in the preferred domestic or foreign supermarket in total spending for food and FMCG was calculated. Hardly surprisingly, it was found that that significant correlation existed only between economic nationalist attitudes and actual spending (Pearson: 0,217; Spearman's: 0,245, both significant at the 0,01 level, 2-tailed). That is, respondents with stronger attitudes on this scale tended, *ceteris paribus*, to buy a higher share of their monthly needs in their preferred supermarket (domestic versus foreign).

4.5 Hypotheses testing

(**H1**) This hypothesis was partly confirmed: better education leads to better country of origin recognition or at least a better country association recognition of retailers. Male consumers also appear to be slightly better informed in this regard than females. Higher income or urban residence may play a role only because of their co-variance with education levels.

However, whether or not the thrust of H1, i.e. that Hungarian consumers by and large know their "who is who", is true, is a matter of judgement. 62% of consumers recognize Hungarian retailers as Hungarian and 50% recognize foreign retailers as foreign. In contrast, more than 1 in every 3 consumers has simply no idea, and probably, no interest either.

(**H2**) This hypothesis was found true with the above caveat. With some notable exceptions, a mere 2 to 8% of consumers display flag-blindedness, i.e. confuse Hungarian country of origin for foreign and vice versa. Yet, the finding under H1 is still valid: nearly 40% of the population simply do not know and hardly care which retailer is from where and more than 60% recognize Hungarian-owned retailers as Hungarian.

(**H3**) This hypothesis was also confirmed. Statistically significant relationship was found between overall store preference (Hungarian versus foreign choice of heart retailer) and country of origin or country of association recognition. In this sense and *ceteris paribus* it means that a choice of heart is a bit more than what it says it is: preference for Hungarian retailers is underpinned by a higher than average ROCA.

(**H4**) The limitations of the respective measure (percentage share of spending in choice of heart store relative to total spending on food and FMCG) make it difficult to confirm or negate this hypothesis. Its formulation "satisfy most of their daily needs" is also misleading. What are "daily needs" and how much is "most"? The largest Hungarian chain, CBA was chosen by 30 respondents as their overall preference while Tesco was chosen by 64 respondents.

63% of those who said to favour CBA indeed spent more than half of their total spending at CBA stores whereas the respective share for Tesco fans was only 41%. Obviously, it doesn't mean that CBA fans are more serious about their patronage preference than friends of Tesco but rather that Tesco is used more for interval (‘grand’) shopping trips while CBA stores for daily convenience shopping.

Concentration ratio*	CBA		Tesco	
	N	percentage	N	percentage
0,0-24,9	4	13%	11	17%
25,0-49,9	7	23%	27	42%
50,0-74,9	10	33%	12	19%
75,0-100,0	9	30%	14	22%
total	*30*	*100%*	*64*	*100%*

Table 18 - Concentration of spending at the choice of heart store

*Share of last month spending in the respective store relative to total monthly spending on food and FMCG.

(**H5**) This hypothesis was unambiguously confirmed as was shown in 4.3 above. Consumers overall patronage preference strongly and significantly correlated with their evaluation of rational store attributes, such as access, price, merchandise, quality and discounting. The strength of the relationship was roughly the same whether one expressed preference for domestic stores or foreign-owned providers.

(**H6**) Distinct sets of consumer beliefs could be differentiated even if not necessarily along the lines hypothesized. The CETSCALE worked even in its arbitrarily abbreviated version. However, consumer ethnocentrism was found to embrace much of the emotional nationalism that was usually thought to be an antecedent at best. (Ruyter et al. 1998) Consumers apparently tend to mix up dimensions related to the choice between domestic and foreign products on grounds of fearing the loss of domestic jobs or their guilt about not buying Hungarian products and the broad concepts of political nationalism. (cf.: Han, 1988) Hence that we have come to believe that consumer ethnocentricity in our sample was a mixture of affective and normative dimensions which could be best described as ‘economic nationalism’.

Patriotism was also found to embrace some purely nationalistic concepts. In accordance with Todosijević (2001) it was found that positive attachment and feeling toward one's nation and its traditions were intermingled with political ethnocentricity and animosity. For this reason, this construct was rather a sort of 'romantic nationalism' than pure sentimental patriotism.

Cosmopolitanism was found to exist as a valid construct, integrating, however, some of the broad concepts of national attachment and patriotism. Furthermore, little if any cosmopolitanism in its traditional sense was identified; rather this dimension which we finally called 'world-minded patriotism' was indeed a liberal, open-minded patriotism. This related to economic nationalism weakly but positively as it incorporated elements of relatively strong national identification. (cf.: Dmitrovic et al. 2009) (See Table 19.)

		Romantic nationalism	**Economic nationalism**	**World-minded patriotism**
Romantic nationalism	Pearson Correlation	1	0,587	0,365
	Sig. (2-tailed)*		0,000	0,000
	N	618	616	616
Economic nationalism	Pearson Correlation	0,587	1	0,132
	Sig. (2-tailed)*	0,000		0,001
	N	616	616	614
World-minded patriotism	Pearson Correlation	0,365	0,132	1
	Sig. (2-tailed)*	0,000	0,001	
	N	616	614	616

Table 19 - Cross-correlations between the various affective/normative constructs

*Correlation is significant at the 0.01 level (2-tailed).

(**H7**) Despite the change in originally hypothesized constructs, this hypothesis came to be partly confirmed. Romantic nationalism and economic nationalism were significantly correlated with overall preference for domestic versus foreign-owned stores. It confirms that these are two distinct constructs that represent complimentary motives for home country bias (Verlegh 2007), and that they affect also patronage choices and not only preference for/against imported products. World-minded patriotism was not related to overall store preference which was in line with the fact that it emerged not as an explicit, pro-foreign bias but as a consumer attitude different from economic nationalism as well as romantic nationalism. (cf.: Table 17)

(**H8**) At its present stage, it was not the aim of this research to build complex statistical models for the antecedents of Hungarian consumers' patronage preference for or against domestic super-/hypermarkets. In line with Steenkamp and Baumgartner (1998), full metric invariance was not considered a condition to be striven for.

Experimentation with binary (given the nature of the dependent variable, i.e. overall preference for domestic versus foreign stores) logistic regression did not lead to interpretable results beyond the fact that a preference for domestic/foreign retailers on cognitive grounds was related to the overall preference. The model (backward stepwise regression) could not but exclude the effects of affective/normative factors.

This failure led us to hypothesize that cognitive preferences could not have been devoid of affective and/or normative influences. That is, and against much of the literature, but in conformity with Fishbein's and Ajzen's theory of reasoned action (1980): culturally embedded beliefs would significantly influence consumer evaluation of store attributes such were price, quality etc. These were not some pure, rational, calculated outcomes based on unbiased comparative considerations but opinions that were affected by cultural beliefs such are, in our case, economic nationalism, romantic nationalism and world-minded patriotism.

The respective literature tends to regard the rational, cultural, affective etc. factors that are supposed to underlie consumer behaviour and choice as working side by side (Vida & Reardon 2008), or takes the equality of rational attributes as given and considers affective consumer influences (affinity) on buying foreign products or buying from foreigners under such circumstances. (Oberecker & Diamantopoulos 2011) Cultural beliefs that are often thought to culminate in consumer ethnocentrism are regarded as mere antecedents to CE. (Balabanis et al. 2001; Cleveland et al. 2009) In contrast, we came to believe that affective factors were important antecedents to cognitive patronage preferences whereas the latter significantly influenced overall store patronage in the context of domestic versus foreign owned retailers as shown above with regard to H5 and in Chapter 4.3.

As shown by Table 20, our modified hypothesis was fully confirmed: with the expected exception of world-minded patriotism, the two affective constructs in view significantly influenced cognitive preference formation both with respect to foreign and domestic retailers. The direction of the relationship was, as expected, negative for foreign stores and positive for preference for domestic stores. Moreover, the (positive) influence of affective factors is stronger in the case of domestic stores, i.e. affinity plays a more robust role than animosity.

	Value	Asymp. std. error[a]	Approx. T[b]	Approx. sig.
Cognitive preference for foreign stores				
Romantic nationalism, N=612				
Kendall's tau-b	-0,144	0,031	-4,629	0,000
Gamma	-0,179	0,039	-4,629	0,000
Economic nationalism, N=610				
Kendall's tau-b	-0,165	0,031	-5,334	0,000
Gamma	-0,200	0,037	-5,334	0,000
World-minded patriotism, N= 616				
Kendall's tau-b	-0,072	0,031	-2,311	0,021
Gamma	-0,091	0,040	-2,311	0,021
Cognitive preference for domestic stores				
Romantic nationalism, N=614				
Kendall's tau-b	0,198	0,029	6,736	0,000
Gamma	0,268	0,039	6,736	0,000
Economic nationalism, N=612				
Kendall's tau-b	0,172	0,030	5,623	0,000
Gamma	0,227	0,039	5,623	0,000
World-minded patriotism, N= 619				
Kendall's tau-b	0,040	0,030	1,328	0,184
Gamma	0,055	0,042	1,328	0,184

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Table 20 - Affective beliefs as constructs influencing cognitive preference formation

CHAPTER 5

SUMMARY FINDINGS AND CONCLUSIONS

In lack of comparative surveys, we cannot say whether the ROCA of hyper-/supermarkets is low or high in Hungary. To be sure, more than 60% of consumers recognize the Hungariannes of domestic owned chains and 50% at least the foreignness of foreign owned chains. It follows that the capacity to respond to eventual, politics-induced ‘buy from nationals’ campaigns is inherently limited to approximately half of the adult population. Moreover, higher educated, urban men revealed a higher than average ROCA, whereas 70% of family shopping decisions are made by women in Hungary (Törőcsik, 2010).

Distinct sets of consumers beliefs were identified which are, in part, different from those routinely analyzed in the respective literature. Consumer ethnocentrism was validated in our study as economic nationalism. Romantic nationalism was also found a valid construct that can and should be distinguished from economic nationalism. (Vida and Reardon 2008) Cosmopolitanism unlike in many other studies (Rybina et al. 2011) could not be identified in its ‘purity’ but as a sort of world-minded patriotism, related both to economic but mostly to romantic nationalism, but having no effect on store patronage preferences.

These constructs failed to reveal marked demographic characteristics with the exception of world-minded patriotism that was related to all demographic indicators but gender. More importantly, and in line with similar findings in the literature (Vasella et al. 2010) economic nationalism was related to individuals whose economic livelihood would be directly threatened by foreign competition, i.e. to less educated and lower income consumers (N.B.: having a lower than average ROCA).

Both economic nationalism and romantic nationalism were found to significantly influence the consumers' cognitive preference formation in the context of foreign versus Hungarian owned retail chains. These consumer beliefs worked not as complements to store patronage choices made on cognitive grounds in shaping overall store preference but rather influenced rationality itself. Consumer rationality is bounded by, among others, embedded cultural beliefs. Once, and against whatever background, the cognitive choice is made, it would have the singularly most important effect on overall, habitual store preference, i.e. on the choice of heart as we called it somewhat misleadingly.

What conclusions do these findings permit with regard to our topical research question? Do they suggest that the Hungarian government could, as it appears to want to, successfully influence store patronage patterns in its tacit 'buy from nationals' campaign? The answer is, as so often, yes and no. Consumers are intendedly rational goal-seekers, whether their emphasis is on price, quality, merchandise selection, store atmospherics or whichever. If their intended rationality were exclusive, politicians would stand no chance trying to influence it. However, even intendedly rational goal-seekers fail, whether for their emotional architecture or cognitive weaknesses. (Jones 1999) Our research showed that rational retail patronage preferences are significantly biased by emotional, affective predispositions. These predispositions are open for political manipulation both through emotional ('romantic') or cognitive ('economic') arguments, and can significantly and tacitly effect what consumers think to be their rational preferences. It can be done with relative ease particularly in a country where a mildly nationalistic mindset is as pervasive as in Hungary.

There are two important constraints, however. One is that consumer rationality prevails in the end of the day. It is known that price (value for money) and quality are the two major attributes that influence store patronage preference formation in Hungary (See Chapter 3.1). We found that emotional mindsets affected rational choice mostly at the level of the comparatively muddy constructs of quality and discounting practices. Convenience of access, price and merchandise assortment were largely left unaffected by affective factors, whether self- or government-induced.

The other constraint is the limits to raising consumer animosity. As shown by Figure 3, stable consumer animosity, whether national or personal must stem from some long-standing negative feeling towards the COO or COA of the retailer. There are no such animosities in our Hungarian sample. Situational animosity can be interpreted at the personal rather than the national level: Tesco as a market leader can be relatively easily denounced as exploiting domestic, small scale suppliers, or as cheating and misleading consumers, but hardly as a retailer of UK origin. (cf.: Appendix 1)

	Stable	Situational
National	Arises from historical background	Arises temporarily caused by specific circumstance
Personal	General negative feeling due to personal experience	Temporary negative sentiments caused by specific circumstance

Figure 3 - Consumer animosity typology

Source: Ang et al. (2004)

If there are no stable attitudes with respect to foreign/domestic owned retailers, a government that wishes to raise pro-domestic consumer bias must, under normal circumstances, refer to personal and situational reasons. In negative terms, specific circumstances must be elaborated why one or another international retailer cannot be trusted. It is easier to promote domestic retailers: they can be presented as Hungarian (a value in itself), and as such, national, stable and personal.

Summing up, the conclusion is that consumers' retailer preference formation can be successfully influenced by politics provided that

- consumers' ROCA permits reliable differentiation between foreign versus domestic owned retailers,
- nationalism is a general attitude in the population, fuelled by romantic or economic considerations,
- affordable quality can be communicated as a specific attribute to domestic products (or to retailers focusing on domestic brands and products).

Situational and personal animosity, i.e. discriminatory retail patronage is, as a rule, emotional, i.e., affective. In contrast, affection, i.e. positive patronage behaviour is cognitive, that is, rational. It follows that 'buy from nationals' government policies need to expound and personalize emotional factors.

International retailers can counter the pro-domestic tide through strengthening their advantages in attributes such as affordable quality, merchandise selection, convenience of access and service excellence. In their effort to elicit positive patronage behaviour, they should first and foremost affect the rational self of the consumer. In addition, they also may play emotional tunes through disguising themselves as Hungarian (or almost) as Spar does (http://spar.hu.spar.at), or by putting emphasis on the domestic origin of their products as Tesco tries to do. (http://tesco.hu) Nevertheless, our research showed that their real competitive strength was in what they actually offered and not in what they communicated about their offering.

Partly for this reason, future research should focus on the cognitive/rational attributes influencing retail patronage: the relative strength of factors such as merchandise assortment, quality, price, convenience, store atmospherics etc. should be examined in much more depth. The extent to which such positive perceptions translate into actual store patronage also remains a topic for future research. A cross-country comparison of affective consumer mindsets also would be desirable: it could confirm that the three streams identified in our Hungarian sample, i.e., romantic nationalism, economic nationalism and world-minded patriotism were a Hungarian specialty, or constructs of wider applicability.

APPENDIX 1

MAGYAR NEMZET ONLINE AND NÉPSZABADSÁG ONLINE REPORTING ON FOOD RETAILERS BETWEEN JUNE 2010 AND APRIL 2011

Source	Date	Accessed	Retailer	Title	Link	Key words
MNO	2011.04.04	2011.04.04	Tesco	Huszonkétezer munkavállaló állását veszélyezteti a Tesco?	http://www.mno.hu/portal/775658?searchtext=Tesco	Tesco endangers 22,000 jobs
MNO	2011.04.04	2011.04.04	Tesco	Előre szóltak a Tescónak az ellenőrzésekről?	http://www.mno.hu/portal/775493?searchtext=Tesco	Was Tesco informed in advance about supervisory checks?
MNO	2011.03.30	2011.04.04	Tesco	Bizonyíték nélkül, jogtalanul követelt pénzt dolgozójától a Tesco	http://www.mno.hu/portal/774551?searchtext=Tesco	Tesco demanded money from its employee unjustly
MNO	2011.03.16	2011.04.04	Tesco	Még mindig várják a pénzt a Tescótól	http://www.mno.hu/portal/771718?searchtext=Tesco	Tesco delays with payments
MNO	2011.03.14	2011.04.04	Tesco	Gumibotos őrök fogadják a Tesco vásárlóit + Képek	http://www.mno.hu/portal/771471?searchtext=Tesco	Aggressive security personnel at Tesco
MNO	2011.03.11	2011.04.04	Tesco	Szakszervezeti szereptévesztés	http://www.mno.hu/portal/770812?searchtext=Tesco	Trade union too lenient about Tesco
MNO	2011.03.10	2011.04.04	Tesco	Leépítés a Tescónál, megbízások Indiában	http://www.mno.hu/portal/770559?searchtext=Tesco	Job cuts at Tesco; new projects in India
MNO	2011.02.24	2011.04.04	Tesco	Bőségben, zavarodottan - Hol és mit vegyünk? – tanácsok a Tudatos Vásárlók Egyesületétől	http://www.mno.hu/portal/767691?searchtext=Tesco	Tesco destroys local handicraft industries
MNO	2011.02.18	2011.04.04	Tesco	Mégis fizet a Tesco a sofőrjeinek	http://www.mno.hu/portal/766559?searchtext=Tesco	Tesco finally pays its drivers
MNO	2011.02.16	2011.04.04	Tesco	Elküldték a kémkedő rendőrt	http://www.mno.hu/portal/766079?searchtext=Tesco	Tesco paid for insider information from police
MNO	2011.02.15	2011.04.04	Tesco	Figyeltették a Tesco érdekvédőit	http://www.mno.hu/portal/765869?searchtext=Tesco	Tesco's trade union officials under surveillance
MNO	2011.02.14	2011.04.04	Tesco	Megfigyeltették a Tescónál működő szakszervezetiseket	http://www.mno.hu/portal/765774?searchtext=Tesco	Tesco's trade union officials under surveillance
MNO	2011.02.11	2011.04.04	Tesco	Haladékot kapott a Tesco	http://www.mno.hu/portal/765345?searchtext=Tesco	Tesco given compliance respite

Source	Date	Accessed	Retailer	Title	Link	Key words
MNO	2011.02.10	2011.04.04	Tesco	Jogellenes elbocsátások a Tescónál	http://www.mno.hu/portal/764912?searchtext=Tesco	Unlawful contract terminations at Tesco
MNO	2011.02.04	2011.04.04	Aldi, Lidl	Trójai falovakat küldött Németország	http://www.mno.hu/portal/763729?searchtext=Tesco	Germany and its Troyan horses
MNO	2011.02.03	2011.04.04	Tesco	Tesco: felszámolási eljárás indult	http://www.mno.hu/portal/763474?searchtext=Tesco	Liquidation procedure against Tesco
MNO	2011.01.31	2011.04.04	Tesco	Hamm, burger!	http://www.mno.hu/portal/762812?searchtext=Tesco	Dioxin exposure at Tesco
MNO	2011.01.15	2011.04.04	Spar, Lidl, Aldi, Tesco, etc	A német tojások negyede dioxinos	http://www.mno.hu/portal/759744?searchtext=Tesco	Dioxin exposure at international retailers
MNO	2011.01.07	2011.04.04	Tesco	Lemond posztjáról a magyarországi Tesco vezérigazgatója	http://www.mno.hu/portal/758006?searchtext=Tesco	Tesco's CEO resigned
MNO	2010.12.31	2011.04.11	Tesco	A gyanús tojástól a szennyezett sertésfejig	http://www.mno.hu/portal/756817?searchtext=Tesco	Suspicious eggs and contaminated pork
MNO	2010.12.23	2011.04.11	Tesco	Felszámolási eljárást kértek a Tesco ellen	http://www.mno.hu/portal/755555?searchtext=Tesco	Liquidation process against Tesco
MNO	2010.12.22	2011.04.11	Tesco	Tofut készítettek a disznóól mellett	http://www.mno.hu/portal/755330?searchtext=Tesco	Contaminated chicken at Tesco
MNO	2010.12.16	2011.04.11	Tesco	Süth árnyéka	http://www.mno.hu/portal/754184?searchtext=Tesco	Contaminated chicken at Tesco
MNO	2010.12.10	2011.04.11	Tesco, Cora, Auchan	Megint elárasztotta az importtej az országot	http://www.mno.hu/portal/752989?searchtext=Tesco	Imported milk flooded the country
MNO	2010.11.23	2011.04.11	Auchan	Olcsó tejért fizet az Auchan	http://www.mno.hu/portal/749723?searchtext=Tesco	Auchan sold imported milk below purchase price
MNO	2010.11.19	2011.04.11	Tesco	Kétes szavatossági dátumok a Tescónál	http://www.mno.hu/portal/748945?searchtext=Tesco	Dubious warranties at Tesco
MNO	2010.11.18	2011.04.11	Tesco	Tesco-ügy: hibát hibára halmoztak	http://www.mno.hu/portal/748732?searchtext=Tesco	Tesco scandals

Source	Date	Accessed	Retailer	Title	Link	Key words
MNO	2010.11.14	2011.04.11	Tesco	Anglia alkonya: Tesco lett a templomból	http://www.mno.hu/portal/748032?searchtext=Tesco	Decay of England: church turned into Tesco store
MNO	2010.11.12	2011.04.11	domestic vs. foreign	Kettős gyártósor	http://www.mno.hu/portal/747642?searchtext=Tesco	Profits of domestic retailers remain at home
MNO	2010.10.28	2011.04.11	Tesco	Többmilliós büntetés elé néz a Tesco	http://www.mno.hu/portal/744968?searchtext=Tesco	Teco looking up to large fine
MNO	2010.10.22	2011.04.11	Tesco	Szülinapi zsákmány	http://www.mno.hu/portal/743928?searchtext=Tesco	Low average wages at Tesco
MNO	2010.10.20	2011.04.12	Tesco	Tesco: zsemlementés a tetőn, villámlásban	http://www.mno.hu/portal/743386?searchtext=Tesco	No reaction to consumer complaints at Tesco
MNO	2010.10.18	2011.04.12	Tesco	Multikulti	http://www.mno.hu/portal/743019?searchtext=Tesco	Aggressive security personnel at Tesco
MNO	2010.10.14	2011.04.12	Tesco	Tesco: a sofőrök is elmaradt juttatásaikat követelik	http://www.mno.hu/portal/742312?searchtext=Tesco	Tesco drivers want their unpaid dues
MNO	2010.10.02	2011.04.12	Tesco	(járjunk-e Tescóba…)	http://www.mno.hu/portal/739975?searchtext=Tesco	Why not to frequent Tesco stores?
MNO	2010.10.01	2011.04.12	Tesco	Gyanús kisajátítások a szocialista Kispesten és Nyírbátorban	http://www.mno.hu/portal/739850?searchtext=Tesco	Links between Socialist-led municipalities and Tesco
MNO	2010.09.29	2011.04.12	Tesco	Megállapodás reálbércsökkenésről	http://www.mno.hu/portal/739266?searchtext=Tesco	Agreement on real wage cuts at Tesco
MNO	2010.09.17	2011.04.12	Tesco	Jaross elbúcsúzott	http://www.mno.hu/portal/736942?searchtext=Tesco	
MNO	2010.09.14	2011.04.12	Tesco	A Tesco gyártatta a halált is okozó veszélyes olajat?	http://www.mno.hu/portal/736412?searchtext=Tesco	Dangerous oils for sale at Tesco
MNO	2010.09.09	2011.04.12	Tesco	Tesco: betontörés helyett feljelentés	http://www.mno.hu/portal/735339?searchtext=Tesco	
MNO	2010.08.27	2011.04.12	Tesco	Nyár tábornok győzelme Oroszországban	http://www.mno.hu/portal/732753?searchtext=Tesco	
MNO	2010.08.23	2011.04.12	Tesco	Több a nonstop Tesco, mint a brit rendőrörs	http://www.mno.hu/portal/731966?searchtext=Tesco	

Source	Date	Accessed	Retailer	Title	Link	Key words
MNO	2010.08.19	2011.04.12	Tesco	Munkaügyi vizsgálat a Tescónál	http://www.mno.hu/portal/731438?searchtext=Tesco	Labour irregularities at Tesco
MNO	2010.08.16	2011.04.12	Tesco	Vajon mennyire fekete a Tesco?	http://www.mno.hu/portal/730821?searchtext=Tesco	Black revenues at Tesco
MNO	2010.08.12	2011.04.12	Tesco	A Tesco most már betartaná a törvényt	http://www.mno.hu/portal/730165?searchtext=Tesco	Too late to comply with the laws
MNO	2010.07.29	2011.04.12	Tesco	Távozik a Tescótól az egyik vezető	http://www.mno.hu/portal/727574?searchtext=Tesco	Tesco's CFO resigned
MNO	2010.07.28	2011.04.12	Tesco	Harc a kiszolgáltatottság ellen	http://www.mno.hu/portal/727311?searchtext=Tesco	Fight against vulnerability
MNO	2010.07.24	2011.04.12	Tesco	Újabb rajtaütés a Tescóban	http://www.mno.hu/portal/726700?searchtext=Tesco	Police raid on Tesco headquarters
MNO	2010.07.22	2011.04.12	Tesco	A Tesco nem tágít	http://www.mno.hu/portal/726270?searchtext=Tesco	Workers do not dare to take grievances
MNO	2010.07.21	2011.04.12	Tesco	Megszállták a Tesco-központot	http://www.mno.hu/portal/726078?searchtext=Tesco	A HUF 700 m fraud at Tesco?
MNO	2010.07.14	2011.04.12	Tesco	Csalt a Tesco vezetése?	http://www.mno.hu/portal/724775?searchtext=Tesco	Fraud at Tesco

Source	Date	Accessed	Retailer	Title	Link	Key words
NOL	2010.06.03	2011.04.12	Tesco	A Tesco kirúgott két szakszervezetist	http://nol.hu/gazdasag/a_tesco_kirugott_ket_szakszervezetist	Tesco fired two trade union officials
NOL	2010.07.05	2011.04.12	Tesco	Tesco a zöld Magyarországért	http://nol.hu/lap/jotett/20100705-tesco_a_zold_magyarorszagert	Tesco for a green Hungary
NOL	2010.07.16	2011.04.12	Tesco	A rendőrség is vizsgálódik Tescóban	http://nol.hu/gazdasag/20100716-csalasi_vadak_ellen_vedekezik_a_tesco-lanc	Police raid on Tesco headquarters
NOL	2010.07.21	2011.04.12	Tesco	Házkutatás a budaörsi Tesco központban	http://nol.hu/gazdasag/hazkutatas_a_budaorsi_tesco_kozpontban	Police seraches documentation at Tesco headquarters
NOL	2010.07.22	2011.04.12	Tesco	A szakszervezetekkel már egyeztet a Tesco	http://nol.hu/gazdasag/20100722-roviden	Tesco's talks with trade union continue
NOL	2010.07.28	2011.04.12	Tesco	Zöldkörúton a Tesco	http://nol.hu/lap/jotett/20100728-diohejban-2	Tesco for greening Hungary
NOL	2010.07.28	2011.04.12	Tesco	Antal Erzsébet távozik a Tescótól	http://nol.hu/gazdasag/antal_erzsebet_tavozik_a_tescotol	CFO left Tesco in the midst of police investigations
NOL	2010.08.20	2011.04.12	Tesco	A Tesco büszke a két meglőtt biztonsági őrre	http://nol.hu/mozaik/a_tesco_buszke_a_ket_meglott_biztonsagi_orre	Tesco is proud of its security personnel
NOL	2010.08.22	2011.04.12	Tesco	Előzetesbe került a Tescóban lövöldöző férfi	http://nol.hu/mozaik/elozetesbe_kerult_a_tescoban_lovoldozo_ferfi	Tesco shooter arrested
NOL	2010. 08 24.	2011.04.12	Tesco	Fellendülhet az Élelmiszerbank	http://nol.hu/lap/jotett/20100824-fellendulhet_az_elelmiszerbank	Tesco donations for the poor
NOL	2010.08.31	2011.04.12	Tesco	Ötből két műanyag ártalmas	http://nol.hu/tud-tech/20100831-otbol_ket_muanyag_artalmas	Harmful plastic products at Tesco

Source	Date	Accessed	Retailer	Title	Link	Key words
NOL	2010.09.21	2011.04.12	Tesco	Lemondott a kereskedelem miniszteri biztosa	http://nol.hu/lap/gazdasag/20100921-lemondott_a_kereskedelem_miniszteri_biztosa	Magyar Nemzet keeps on publishing 'Tesco secrets'
NOL	2010.09.21	2011.04.12	Tesco	Hétfőn kirobban a viagraháború	http://nol.hu/gazdasag/hetfon_kirobban_a_viagrahaboru	Controversions around Tesco's Viagra sales
NOL	2010.09.30	2011.04.12	Tesco	Átmeneti otthonok Edelényben	http://nol.hu/lap/jotett/20100930-diohejban	Tesco donation for flood victims
NOL	2010.10.13	2011.04.12	Tesco	Orbánék a 'súlyos válság' miatt bevezetik a Tesco-adót	http://nol.hu/gazdasag/orbanek_a__sulyos_valsag__miatt_bevezeti_a_tesco-adot	Retailers taxed by government
NOL	2010.10.14	2011.04.12	Tesco	A láncok már fel is szólaltak a hipermarketadó ellen	http://nol.hu/gazdasag/20101014-lecovekelik_az_aruhazlancokat	Retailers protetst against hypermarket tax
NOL	2010.10.15	2011.04.12	Tesco	Az osztrák lánctulajdonosok furcsállják a különadót	http://nol.hu/gazdasag/az_osztrak_lanctulajdonosok_furcsalljak_a_kulonadot	Austrian retailers doubt the legitimacy of extra tax
NOL	2010.10.16	2011.04.12	Tesco	A Tesco és a multik fizetnek, a hazai láncok profitálnak	http://nol.hu/gazdasag/20101016-a_nagysag_atka_a_hipermarketeken	Tesco and foreign retailers are taxed, the Hungarian owned chains are not
NOL	2010.10.27	2011.04.12	Tesco	Egy mindenkiért vagy mindenki egyért: Fogadj el! Fogadd el!	http://nol.hu/lap/jotett/20101027-egy_mindenkiert_vagy_mindenki_egyert__fogadj_el_fogadd_el	Tesco donation for charity
NOL	2010.10.27	2011.04.12	Tesco	Mosoly Alapítvány az Év Támogatottja	http://nol.hu/lap/jotett/20101027-diohejban-4	Tesco donation for charity
NOL	2010.10.27	2011.04.12	Tesco	Kosárkupa hétezer résztvevővel	http://nol.hu/lap/jotett/20101027-diohejban-3	Tesco donation for charity
NOL	2010.10.27	2011.04.12	Tesco	„Ha szelektál, Ön is profitál”	http://nol.hu/lap/jotett/20101027-diohejban	Tesco for selective waste collection

Source	Date	Accessed	Retailer	Title	Link	Key words
NOL	2010. 10 28.	2011.04.12	Tesco	Sokmilliós munkaügyi bírságra számíthat a Tesco	http://nol.hu/gazdasag/sokmillios_munkaugyi_birsagra_szamithat_a_tesco	Tesco was fined for labour irregularities
NOL	2010.10.30	2011.04.12	Tesco	A hipermarketek egyre több szegény családot szolgálnak	http://nol.hu/belfold/20101030-a_hipermarketek_egyre_tobb_szegeny_csaladot_szolgalnak	Hypermarkets support poorest families
NOL	2010.10.30	2011.04.12	Tesco	Ki fizeti a válságadókat?	http://nol.hu/gazdasag/20101030-ki_fizeti_az_adot_	Who pays the crisis taxes?
NOL	2010.11.14	2011.04.12	Tesco	Aczél Endre: Orbán csodája	http://nol.hu/velemeny/20101113-orban_csodaja	The PM's special relationship with CBA
NOL	2010.11.17	2011.04.12	Tesco	Tengerre tájolt koncertterem - Díjazott tervek és épületek	http://nol.hu/kult/tengerre_tajolt_koncerttere m	Recent Tesco developments

APPENDIX 2

KUTATÁSI ADATOK / *RESEARCH DATA*

(Distributions of questionnaire responses in per cent)

A megkérdezettek száma: 619 fő / ***Number of respondents: 619***

1. Ön hogy tudja, az egyes üzletláncoknak melyik az anyaországa? Kérem soronként, azaz minden egyes cég esetében külön jelölje, hogy az adott üzletlánchoz mely anyaország tartozik! *(What is the country of origin of the listed retail chains? Please indicate in each row which country of origin can be associated with the the individual retailer.)*

	Ausztria/ *Austria*	Belgium/ *Belgium*	Francia-ország/ *France*	Magyar-ország/ *Hungary*	Nagy-Britannia/ *Great Britain*	Német-ország/ *Germany*	nem tudja, válaszhiány/ *doesn't know, no answer*
Aldi	14	2	3	2	1	44	34
Auchan	3	6	38	2	2	11	39
CBA	2	2	1	69	0	2	24
Coop	5	0	1	69	1	1	24
Cora	3	6	20	6	8	4	54
Lidl	8	2	2	3	1	59	26
Match	9	3	7	5	9	12	54
Metro	4	3	2	12	12	18	48
Penny Market	4	1	1	11	19	26	38
Profi	6	1	5	21	5	5	58
Reál	2	1	5	48	1	3	40
Spar/Interspar	17	4	2	8	3	27	39
Tesco	1	2	2	6	52	7	31

2. Ön, ha egy átlagos hétköznapjára gondol, a napi rutinja során mely üzletlánc boltja érhető el az Ön számára a legkényelmesebben? (*Thinking of your daily routine shopping, which retailer's store is the most conveniently accessible for you?)*

Aldi	1
Auchan	6
CBA	12
Coop	20
Cora	1
Lidl	17
Match	1
Metro	1
Penny Market	6
Profi	1
Reál	5
Spar/Interspar	14
Tesco	16
nem tudja, válaszhiány (*doesn't know, no answer*)	

3. És egy átlagos hétköznapon Ön ebben a legkönnyebben elérhető …ban/-ben szokott bevásárolni? (*And on a weekday, do you in fact do your shopping in this most conveniently accessible store*?)

igen (*yes*)	84
nem (*no*)	16
nem tudja, válaszhiány (*doesn't know, no answer*)	0

3a. És akkor melyikben vásárol, ha nem a legkönnyebben elérhető …ban/ben? (*And if not in the one that is most conveniently accessible for you, in which retailer's store do you do your shopping*?)

	az összes kérdezett %-ában/in % of all responses	az előző kérdésre „nem"-mel válaszolók százalékában/*in % of negative responses to Q3* n=100 fő
Aldi	0	1
Auchan	1	4
CBA	1	3
Coop	0	2
Cora	0	0
Lidl	1	5
Match	-	-
Metro	-	-
Penny Market	2	10
Profi	0	1
Reál	0	1
Spar/Interspar	1	8
Tesco	3	18
egyéb helyen (pl. helyi közért, piac) (*elsewhere, e.g. local farmers' market*)	5	33
nem tudja (*doesn't know*)	2	14

4. Ön elsősorban miért nem a legkönnyebben elérhető üzletben vásárol? (*What is the reason for your shopping elsewhere than in the most conveniently accessible store?*)

N=100 -

az árak miatt (*b/c of the prices*)	26
az áruválaszték miatt (*b/c of merchandise assortment*)	12
az eladók, a kiszolgálás miatt (*b/c of service quality*)	2
az üzlet stílusa, üzletpolitikája miatt (*b/c of store atmospherics*)	5
az üzlet tisztasága, környezete miatt (*b/c of the cleanliness of the store and its environment*)	2
egyéb ok miatt (*for other reason*)	51
nem tudja, válaszhiány (*doesn't know, no answer*)	3

5. Ön, ha nagybevásárlásra gondol, melyik az az üzletlánc, amelynek boltja az Ön számára erre a célra a legkényelmesebben elérhető? (*Thinking of your 'grand shopping trips', which retailer's store is the most conveniently accessible for you?)*

Aldi	1
Auchan	15
CBA	2
Coop	6
Cora	3
Lidl	11
Match	-
Metro	1
Penny Market	6
Profi	1
Reál	1
Spar/Interspar	13
Tesco	41
nem tudja, válaszhiány (*doesn't know, no answer*)	0

6. És Ön ebben a legkönnyebben elérhető …-ban/-ben szokta a nagybevásárlást intézni? *(And do you in fact do your grand shopping in this most conveniently accessible store?)*

igen (*yes*)	92
nem (*no*)	8
nem tudja, válaszhiány (*doesn't know, no answer*)	0

6a. És melyikben végzi a nagybevásárlásait, ha nem a legkönnyebben elérhető -ban/ben? *(Where do you do your grand shopping if not in the store that is most conveniently accessible for you?)*

- -

Aldi	0
Auchan	1
CBA	0
Coop	0
Cora	0
Lidl	1
Match	-
Metro	0
Penny Market	0
Profi	2
Reál	0
Spar/Interspar	0
Tesco	3
egyéb helyen (*elsewhere*)	1
nem szoktam nagybevásárolni (*I do not do 'grand shopping trips'*)	0
nem tudja, válaszhiány (*doesn't know, no answer*)	-

7. Ön elsősorban miért nem a legkönnyebben elérhető üzletben intézi a nagybevásárlást? *(What is the reason for your 'grand shopping' elsewhere than in the most conveniently accessible store?)*

az árak miatt (*b/c of the prices*)	3
az áruválaszték miatt (*b/c of merchandise assortment*)	2
az eladók, a kiszolgálás miatt (*b/c of service quality*)	0
az üzlet stílusa, üzletpolitikája miatt (*b/c of store atmospherics*)	0
az üzlet tisztasága, környezete miatt (*b/c of the cleanliness of the store and its environment*)	1
egyéb ok miatt (*for other reason*)	1
nem tudja (*doesn't know*)	1

8. Ön szerint melyik üzletlánc kínálja termékeit a legkedvezőbb árakon? *(Which retailer offers, do you think, its merchandise at the most attractive prices?)*

Aldi	2
Auchan	13
CBA	6
Coop	4
Cora	1

Lidl	18
Match	-
Metro	3
Penny Market	16
Profi	0
Reál	0
Spar/Interspar	1
Tesco	25
nem tudja, válaszhiány (*doesn't know, no answer)*	10

9. És melyik üzletlánc kínálja a legszélesebb áruválasztékot? *(Which retailer offers, do you think, the widest merchandise assortment?)*

Aldi	1
Auchan	22
CBA	1
Coop	3
Cora	10
Lidl	5
Match	0
Metro	6
Penny Market	1
Profi	-
Reál	0
Spar/Interspar	9
Tesco	31
nem tudja, válaszhiány (*doesn't know, no answer*)	10

10. Ön szerint melyik üzletláncnál található a legjobb minőségű, legfrissebb áru? *(Which retailer offers, do you think, the best quality merchandise?)*

Aldi	1
Auchan	12
CBA	9
Coop	5
Cora	5
Lidl	10
Match	0
Metro	2

Penny Market	2
Profi	-
Reál	1
Spar/Interspar	28
Tesco	13
nem tudja, válaszhiány (*doesn't know, no answer*)	13

11. És végül tapasztalatai szerint melyik üzletlánc kínálja Ön számára a legtöbb, legvonzóbb akciót? *(And finally,which retailer offers, do you think, the most attractive sales promotions and discounts?)*

Aldi	1
Auchan	17
CBA	4
Coop	3
Cora	3
Lidl	13
Match	-
Metro	1
Penny Market	6
Profi	0
Reál	0
Spar/Interspar	9
Tesco	36
nem tudja, válaszhiány (*doesn't know, no answer*)	8

12. Kérem, jelölje, hogy az Ön esetében mi illik leginkább a pontozott vonalra (*Please indicate what should be written on the dotted line*):

Szívem szerint én mindig a(z) .... -ban/-ben vásárolnék. (*I would if I could always do shopping at* …….)

Aldi	1
Auchan	17
CBA	11
Coop	6
Cora	6
Lidl	13
Match	0
Metro	1
Penny Market	3
Profi	-
Reál	1

Spar/Interspar	14
Tesco	26
nem tudja, válaszhiány (*doesn't know, no answer*)	-

13. Az elmúlt egy hónap során Ön(ök) kb. mennyit költött(ek) … üzletlánc boltjában (boltjaiban)? *(How much did you spend in the store(s) of your most favoured retailer in the past month?)*

semennyit (*nothing*)	11
10 ezer forintot vagy annál kevesebbet (*less than HUF 10.000*)	16
10.001-20.000 forintot *(HUF 10.001-20.000)*	20
20.001-30.000 forintot *(HUF 20.001-30.000)*	19
30.001-40.000 forintot *(HUF 30.001-40.000)*	10
40.001-50.000 forintot *(HUF 40.001-50.000)*	6
50.001-60.000 forintot *(HUF 50.001-60.000)*	7
60.001-70.000 forintot *(HUF 60.001-70.000)*	2
70.001-80.000 forintot *(HUF 70.001-80.000)*	3
80.001-90.000 forintot *(HUF 80.001-90.000)*	1
90 ezer forintnál többet *(more than HUF 90.000)*	1
nem tudja, válaszhiány (doesn't know, no answer)	5

14. Most gondoljon egy átlagos hónapra. Egy ilyen hónapban Ön(ök) mennyit költ(enek) élelmiszerekre és napi fogyasztási cikkekre? *(Think of an average month. How much do you spend on food and daily convenience goods during such a month?)*

10 ezer forintot vagy annál kevesebbet (*less than HUF 10.000)*	7
10.001-20.000 forintot *(HUF 10.001-20.000)*	16
20.001-30.000 forintot *(HUF 20.001-30.000)*	19
30.001-40.000 forintot *(HUF 30.001-40.000)*	15
40.001-50.000 forintot *(HUF 40.001-50.000)*	8
50.001-60.000 forintot *(HUF 50.001-60.000)*	13
60.001-70.000 forintot *(HUF 60.001-70.000)*	5
70.001-80.000 forintot *(HUF 70.001-80.000)*	4
80.001-90.000 forintot *(HUF 80.001-90.000)*	2
90 ezer forintnál többet *(more than HUF 90.000)*	4
nem tudja, válaszhiány (*doesn't know, no answer*)	6

15. A következőkben különböző állításokat olvashat. Kérem, jelölje mindegyikkel kapcsolatban, - azaz minden egyes sorban külön-külön, - hogy Ön mennyire ért egyet az adott állítással: teljes mértékben, inkább igen, egyet is ért meg nem is, inkább nem ért egyet vagy egyáltalán nem ért egyet velük. *(Below, you'll find various statements. Please indicate separately in each row to what extent do you agree with the given statement: you may strongly agree, agree, neither agree nor disagree, disagree or strongly disagree.)*

	teljes mértékben egyetért (*strongly agree*)	inkább egyetért (*agree*)	egyet is ért, meg nem is (*neither agree nor disagree*)	inkább nem ért egyet (*disagree*)	egyáltalán nem ért egyet (*strongly disagree*)	nem tudja, válasz-hiány (*doesn't know, no answer*)
A hazához való hűség a legfontosabb elvárás egy tisztességes emberrel szemben. / *Loyalty to their homeland can be expected from all decent people.*	42	16	29	5	8	1
Sokat jelent nekem, hogy magyarnak születtem. / *It means a lot to me that I was born Hungarian.*	49	19	21	4	6	1
Büszke vagyok a magyarságomra. */ I am proud to be Hungarian.*	60	13	19	4	3	1
Nekem személyesen is jól esik, ha egy külföldi dicsérően szól Magyarországról. / *I find it personally flattering when a foreigner speaks favourably of Hungary.*	64	21	10	4	1	1
Erősen kötődöm magyar hazámhoz. */ I am strongly attached to my Hungarian homeland.*	56	16	18	4	5	1
A magyar ember legyen büszke a magyarságára. / *Hungarians should be proud of their Hungarianness.*	59	11	22	5	2	1
Magyarország történelmi múltja gazdag és egyedi. */ Hungary has a rich and unique historical heritage.*	55	18	22	3	2	0
A magyar történelem és tudomány nagyjait számon tartják szerte a világon. / *The great personalities of Hungarian history and science are respected all over the world.*	37	22	28	6	4	2
Szívesen „merülök alá" más	22	25	37	10	5	2

	teljes mértékben egyetért (*strongly agree*)	inkább egyetért (*agree*)	egyet is ért, meg nem is (*neither agree nor disagree*)	inkább nem ért egyet (*disagree*)	egyáltalán nem ért egyet (*strongly disagree*)	nem tudja, válasz-hiány (*doesn't know, no answer*)
kultúrákban. / *I like immersing myself in different cultural environments.*						
Örömmel barátkozom más kultúrájú emberekkel. / *I like to have contact with people from different cultures.*	42	35	19	2	1	1
Szívesen töltenék akár hosszabb időt is külföldön. / *I'd love to spend some extended time abroad.*	29	13	38	9	10	2
Fontosnak tartom, hogy tájékozott legyek a Magyarországon kívüli világ dolgairól. */ I enjoy getting news from all over the world.*	51	19	24	5	1	1
A legfontosabb feladatunk nemzeti összetartozásunk megújítása. / *Renewal of our national cohesion is our most important task.*	35	25	22	9	7	2
A nemzeti hovatartozás az egyén egyik legfontosabb személyiségjegye. */ One's most important characteristics come from his nationality.*	38	22	26	5	8	1
Nemzetünk más nemzetek fölé helyezése nem gonosztól való: egyszerűen a nemzetünk iránti szeretet kifejeződése. / *Putting our nation above others is nothing evil; it is just an expression of love for our people.*	24	18	37	8	12	2
Nemzetünket és nemzeti hagyományainkat tisztelni vagyunk kötelesek. / *One must respect his nation and his national traditions.*	50	27	18	2	3	1
Nem helyes külföldi termékeket vásárolni. / *It is not right to purchase foreign products.*	13	8	40	13	22	3
Magyar termékeket kellene vásárolnunk, hogy ne a külföldiek gazdagodjanak meg rajtunk. */ We should*	49	18	19	5	7	2

	teljes mértékben egyetért (*strongly agree*)	inkább egyetért (*agree*)	egyet is ért, meg nem is (*neither agree nor disagree*)	inkább nem ért egyet (*disagree*)	egyáltalán nem ért egyet (*strongly disagree*)	nem tudja, válasz-hiány (*doesn't know, no answer*)
purchase products manufactured in Hungary instead of letting others to get rich off us.						
A magyar embereknek nem kellene külföldről behozott termékeket vásárolniuk, mert az árt a hazai vállalkozásoknak és munkahelyek elvesztéséhez vezet. / *Hungarians should not buy foreign products because this hurts Hungarian business and causes unemployment.*	32	13	33	8	13	2
Csak olyan termékeket szabadna importálnunk, amelyek nálunk nem elérhetők. / *We should import only those goods that we cannot obtain within our own country.*	34	23	27	5	10	1
Én akkor is támogatom a hazai termékeket, ha ez hosszú távon több pénzembe kerül. / *I prefer Hungarian products even if it may cost me more on the long run.*	24	20	28	13	13	3
Igaz magyar ember - ha teheti - magyar terméket vásárol. / *A real Hungarian should always buy Hungarian-made products.*	40	15	26	7	10	2

APPENDIX 3

Total Variance Explained

Factor	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	**% of Variance**	**Cumulative %**	**Total**	**% of Variance**	**Cumulative %**	**Total**	**% of Variance**	**Cumulative %**
1	8,299	43,681	43,681	7,924	41,705	41,705	5,085	26,764	26,764
2	2,700	14,209	57,889	2,290	12,055	53,760	4,452	23,430	50,195
3	1,499	7,889	65,778	1,035	5,448	59,208	1,712	9,013	59,208
4	0,812	4,272	70,050						
5	0,749	3,941	73,991						
6	0,679	3,571	77,562						
7	0,580	3,054	80,617						
8	0,477	2,512	83,128						
9	0,459	2,415	85,543						
10	0,385	2,029	87,572						
11	0,383	2,015	89,587						
12	0,348	1,832	91,418						
13	0,333	1,751	93,169						
14	0,297	1,563	94,732						
15	0,287	1,508	96,240						
16	0,238	1,254	97,494						
17	0,180	0,947	98,441						
18	0,168	0,886	99,327						
19	0,128	0,673	100,000						

Extraction Method: Principal Axis Factoring

APPENDIX 4

KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		0,914
Bartlett's Test of Sphericity	Approx. Chi-Square	7173,810
	df	171
	Sig.	0,000

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