Consumers values with regard to buying food from short market channels

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Abstract

This paper highlights some of the cultural values, consumption goals and product/market channel attributes important for the decision making of consumers buying food from marketing initiatives characterised by short market channels. Examples of short market channels are : a shop at the farm, a farmers' market, some of the labels qualifying food as specific with regard to its origin or its production method.
The paper also analyses to what extent the concerned initiatives take the consumers' perspective into account in their marketing strategies and makes some suggestions on how they can improve their marketing strategies.
The framework of the study is the Means-End-Chain theory (MEC-theory), a useful frame for this study as it allows to understand how consumers use tangible characteristics of the marketing initiative and its product in order to achieve certain ends, i.e. consumption goals and cultural values which people wish to hold.
The Means-End-Chains of customers have been elicited and analysed using the "Laddering" research method. Some main conclusions are : The desire for security with regard to health is a major reason for consumers to buy pure and natural food of known origin, not just guaranteed by a formal label but also by the (semi)-direct contact with the producer and the shortness of the commercialisation chain. This shortness of the chain also allows obtaining the desired specific quality products at an affordable price. Furthermore "pleasure" is an important value in the consumer's motivation to buy this kind of products ; it results from enjoying the specific taste but also from the contact with rural life.
A comparison between the customers' motivation and the product concept as formulated by the actors of the initiatives shows that in most cases both groups have a similar vision on products and their desired quality.
However several initiatives are slow to adjust to and benefit from the evolving attitude of the consumer towards food quality ; they fail to take advantage of emerging consumer trends and values. This is mainly because of a strong focus on their products rather than on consumer needs and a lack of communication with consumers outside their normal public.

Keywords : Belgium, consumer, food, laddering, market channels, means-end-chains.

INTRODUCTION

The food market is increasingly consumer driven. Especially in the E.U. the market management for food products is becoming increasingly cluttered as a result of changing consumption patterns. Prices are low and continue to decline in the E.U., which has in the Agenda 2000 agreement already decided to reduce the guaranteed producer prices for beef, milk and wheat. This was done in the wake of the Millennium Round trade liberalisation talks at the WTO, during which other states undoubtedly will denounce the still very high levels of European price support for the agricultural sector. At the global level, the E.U. faces the challenge of securing markets overseas and not losing markets within Europe to cheaper imported food. In addition, the agricultural sector faces new requirements related to the quality of its output. The public is increasingly suspicious with regard to the industrial quality standards for food ; an attitude, which has been enforced among others by the BSE crisis in the UK and recently the dioxin-crisis in Belgium (two cases in which hazardous substances entered the food chain). Another factor which complicates doing business in agriculture is the increasing public concern over the way farmers deal with the environment and animal welfare, as is illustrated by Verbeke and Viaene (2000) for livestock production. Blandford and Fulponi (1999) have analysed the implications for domestic policies and international trade commitments.

It is in that context that the E.U. Regulation 2078 and the Agenda 2000 provide financial support for environmentally friendly agriculture. Furthermore it points out that activities among which "the development and marketing of high-quality produce, rural tourism and projects linked to the environment and the regions' culture can contribute to rural diversification as a necessary complement to farming" (EC, 1997).

Given the limited scope for reduction of production costs and the fact that the market offers many quite similar looking food brands, it is increasingly likely that consumers may prefer that brand which makes a difference in his or her opinion. With regard to marketing strategy, it means that product development should not just rely on increasing productivity and reducing production costs. Rather than producing more of the same, the successful agribusiness company will try to identify and meet the needs of consumers (Audenaert and Steenkamp, 1997).

Traditionally farmers tried to obtain added value from their produce by selling them directly at the farm gate. Recently a number of collective initiatives have emerged in which farmers co-operate to differentiate their products from those in the conventional market system. Often the basis of such successful innovation has been collective action in which apart from the food producers, also consumers have been involved.

In a countrywide inventory in Belgium in 1996, 325 such projects were identified. The inventory demonstrates that many of these collective actions have similar objectives : restoration of the confidence in the production system and product quality, maintenance and protection of natural resources and struggle against marginalisation of farm labour and less favoured areas (Van Huylenbroeck et al.,1997).

In a second phase of the research, five cases have been studied in more detail :

- "Farmers' Markets", where farmers sell their own produce directly to consumers ;
- Butcheries which sell beef under the label "*Blanc Bleu Fermier*" ;
- A farm shop selling apples under the label "*fruit from integrated production*" i.e. with reduced pesticide use ;
- "*Fermière de Méan*", a co-operative which produces and sells cheese at markets and in own shops ;
- "Food Teams", an initiative in which consumers jointly subscribe to weekly food supplies by selected producers.

This paper reports on the consumer behaviour research, which was conducted in each of the case studies. The research analyses consumers' attitudes towards these initiatives and aims to provide clues as to the most appropriate strategy for demand-driven innovation, i.e. based on consumer needs.

The conceptual framework and the results of the consumer research are presented in section 1 and 2. Section 3 analyses the product concept as held by the actors of the short market systems, and confronts this to the consumers' attitudes. In section 4, some conclusions are formulated.

1. CONCEPTUAL FRAMEWORK

Fishbeins' multi-attribute model of attitudes (1963) states that consumers' attitudes depend on the attributes products are believed to have, and on the relevance of these attributes for the consumer.

$A_o = \Sigma b_i e_i$

A_o : attitude towards an object or brand,

b_i : belief that the brand has certain attributes and benefits i,

e_i : evaluation of the attribute or of the benefit obtained.

So the attitude towards a brand consists of two variables, one (b_i) measures to what extent the consumer believes that a brand will have a certain effect when consumed. The other one (e_i) indicates if the person likes this consequence, and this is related to "what really matters" for the consumer : in other words, it is linked to the persons' aspirations in life and thus to the cultural values this person holds.

A consumer who recognises that a brand has certain characteristics may still have a negative attitude towards purchasing. For instance, a consumer may well believe (b_i) that a meal prepared with origin labelled products has an extraordinary taste, but if the person does not attach much importance (e_i) to cooking impressive meals, he/she is not likely to buy those products.

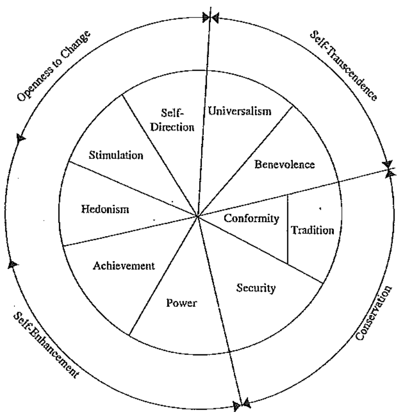
Apart from this important personal factor in consumers' attitude, the opinion of peers also influences decision making, whereby especially the influence of the partner and family members matters. Of course, other factors such as income and availability of the product may still prevent the consumer from buying the product. However, in general a positive attitude towards buying a brand (or the intention to buy) predicts well the actual purchasing behaviour.

Given the importance of the personal evaluation of whether a behaviour is good or bad, it is worthwhile to take a closer look at cultural values.

Cultural values are "an especially important class of beliefs shared by the members of a society as to what behaviours are desirable or undesirable. Those beliefs hold that some general state of existence is personally and socially are worth striving for" (Assael,1998).

Several authors have defined and classified cultural values, such as Rokeach (1968), Kahle et al (1986) and Schwartz (1994). Figure 1 shows how Schwartz structures cultural values into 10 value types which in turn belong to four higher order value types.

Figure 1 : Schwartz s Model of Relations Among Motivational Types of Values and Higher Order Value Types.



Source : Adapted from Schwartz (1994)

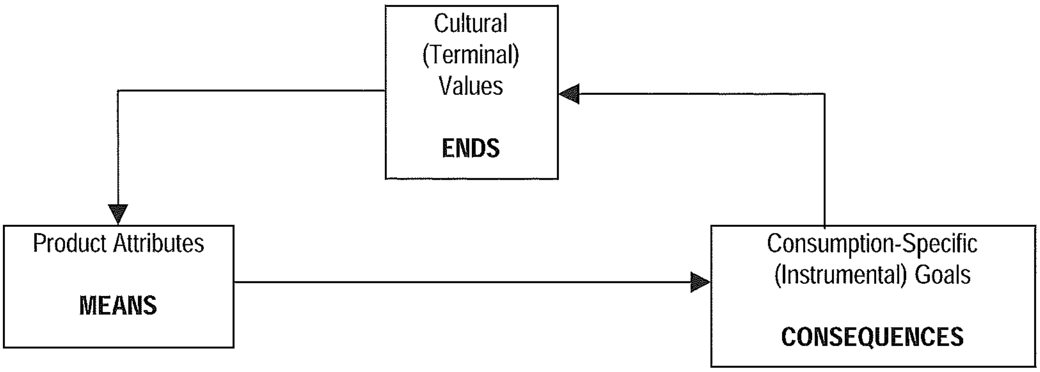
Cultural values are learnt starting at an early age, they are widely held and commonly accepted in a given culture and differentiate the own culture from other cultures. Though universal, the relative importance differs from one culture to another. In the Western world for instance, individuality and youthfulness are widely shared values, whereas in many countries in the South conformity to the group and respect for the elderly are widely held. Also the manner in which values are striven for can greatly differ, e.g. the numerous examples of foods which are considered a delicacy in one culture but not eaten at all in another.

Two basic theories emphasise the role of cultural values in consumer behaviour. One is the value theory of Rokeach (1968), who distinguishes between cultural or terminal values and instrumental values also called consumption-specific goals. For example, the cultural value "a world of beauty" can result from the instrumental value "elimination of pollution".

Another theory is Rosenberg's expectancy-value theory (1956). In his opinion, consumers evaluate products based on the degree to which they are instrumental in achieving cultural values.

Gutman (1982) made the conceptualisations of Rokeach and Rosenberg regarding the instrumental role of values in consumer behaviour more applicable to marketing by adding product attributes. By doing so, he highlights the role of product attributes in the Culture-Consumer Behaviour Interface, as illustrated in figure 2.

Figure 2 : The culture-consumer behaviour interface



The **Means-End-Chains** proposed by Gutman (1982) allow explaining **how** a product facilitates the achievement of desired end states. The means (product attributes) are the vehicle for attaining cultural values (the ends) with consumption goals (the consequences of consuming a product) as the intermediary between them. As such, product attributes are the reflection of cultural values, as illustrated in figure 2.

The interlinked Mean-End-Chains are stored in the respondents' memory and form an associative network of knowledge. This network is referred to as a "motivation structure" because of the motivating effects of the knowledge. If marketing communication features a concept, e.g. a product attribute or a consequence, which is present in the consumers' motivation structure, the network is activated and the consumer may be motivated to purchase the advertised brand.

2. CONSUMER RESEARCH

For the 5 short market channels, the Means-End-Chains related to one or two product groups (vegetables, beef, milk products) and Means-End-Chains related to the organisational set-up of the market channel, have been elicited during so called "Laddering-interviews". A hypothesis of this research is that studying the Means-End-Chains for both products and market channel will allow to detect interactions between intrinsic product characteristics and specific features of the market channel or the organisational set-up of the initiative itself.

2.1. Methodology

In the "**Laddering**" **interviewing method** (Reynolds and Gutman, 1988), respondents first of all indicate on a checklist of salient attributes those, which they find important, less important and not important at all. Then the interviewer chooses five important attributes and uses variations of the question "why is this important to you ?" to prompt the respondent to elicit the consequences and values which together form a Means-End-Chain.

For each short market channel, 20 customers were asked which characteristics or attributes of the products and of the market channel they found important. Based on the response, attribute-checklists were established which contained around 10 of the most frequently mentioned attributes. A lot of similarity between the checklist of the various short market channels could be observed.

In a second step, customers at the short market channel initiative were approached and asked to take an appointment for the Laddering-interview, which is necessary as it takes up to 45 minutes. In total 20 persons were selected per market channel, adding up to a total of 100 interviews. To avoid biases related to the moment of purchasing (week-end or during the week), the contacting of respondents was spread over several days.

This type of convenience sampling is allowed for the Laddering research method. The main criterion is that respondents should be able and prepared to "speak out" and that the person knows the products and market channels well. The number of 20 respondents per initiative is relatively low, but still acceptable as it concerns very specific market channels with a limited total number of customers.

During the interviews, the aim is to get as broad a spectrum as possible of all Means-End-Chains that occur. Hence, the interviewer tries to get Means-End-Chains starting from each available attribute on the list. Some attributes generate a lot of Means-End-Chains or ladders ; others lead only to a few consequences and values. In principle, all Means-End-Chains mentioned by the respondents are noted.

Data from the Laddering interviews have been encoded, i.e. replies with the same content are replaced by one synonym. The encoded data have then been analysed with the "Laddermap-software" (Gengler, 1997), allowing aggregating the Means-End-Chains of all respondents into a **Hierarchical Value Map** or **Consumer Decision Map**. Those maps are graphical representations of the motivation structure and are found useful for value-based segmentation, product or brand assessment and as tool for advertising (Audenaert and Steenkamp, 1997).

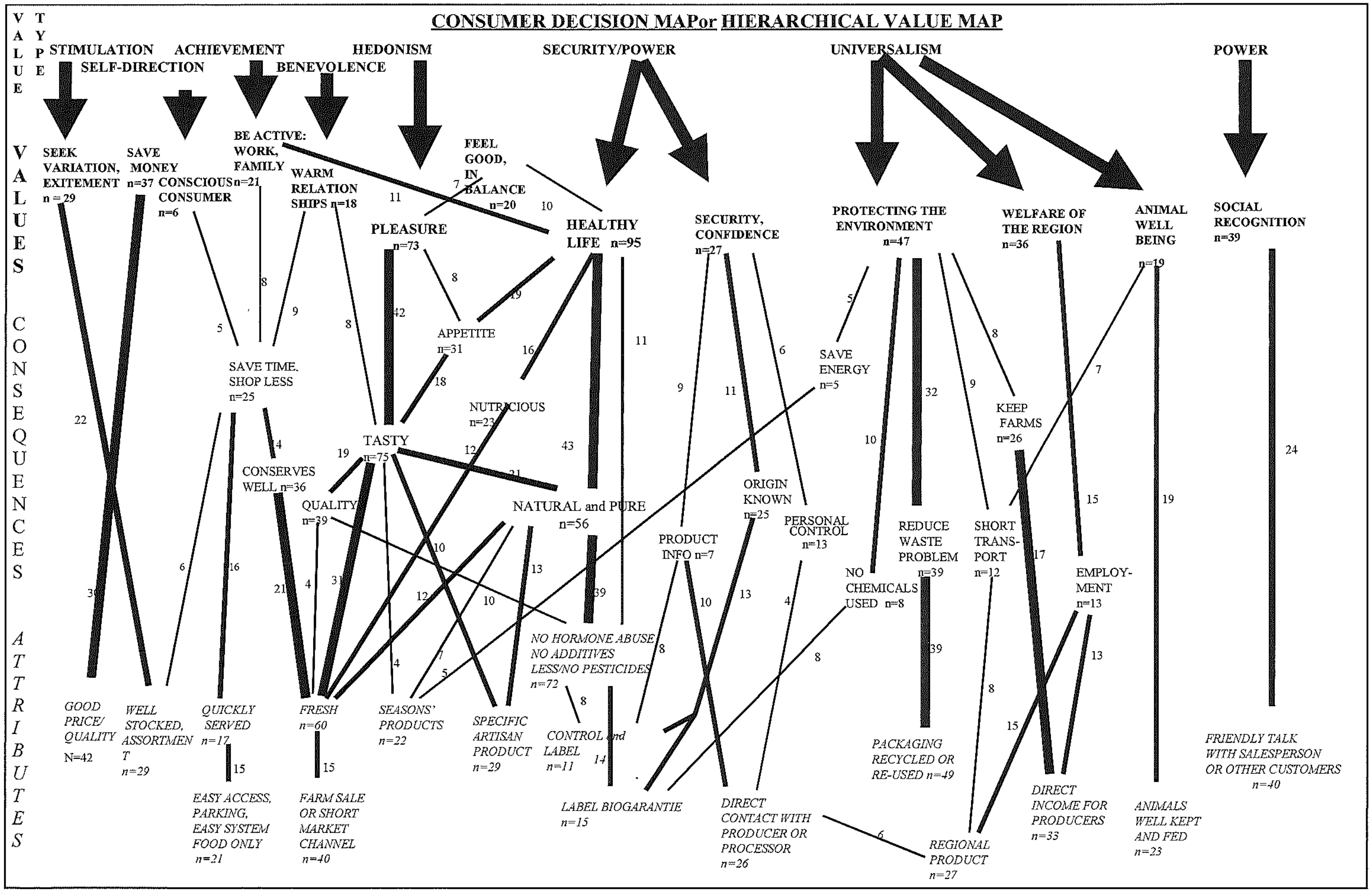
2. 2. Results of the consumer research

2.2.1. The Consumer Decision Map

The Consumer Decision Map in figure 3 represents a synthesis of the decision maps related to 100 clients, 20 of each initiative. This aggregated decision map thus highlights similarities in consumer motivation structure and behaviour towards the respective short market channel initiatives. The Means-End-Chains are grouped according to the value types defined in the Value Theory of Schwartz (1994).

- The top line and arrows indicate to which value type a given segment of the map belongs ;
- The three consecutive levels of the map represent values (**bold**), consequences (plain) and product or market channel attributes (Italics) ;
- n = 75 means that 75% of respondents mentioned this concept ;
- The lines represent the Means-End-Chains, with the thickness and the numbers indicating how strong certain concepts are interlinked.

Figure 3 : Consumer Decision Map and value-based segments with regard to buying food from short market channels (Key to the Consumer Decision Map on the previous page) :



2.2.2. General findings

The consumer decision map in Figure 3 supports the value structure as formulated by Schwartz. Of the 10 value types, he proposes, 8 are found in the motivation of the respondents. Only the value types "conformity" and "tradition" do not appear in this aggregate decision map ; although in some maps of individual initiatives, they are mentioned.

Both product and initiative attributes are perceived as relevant means to achieve desired consequences and values. Product and market channel attributes are sometimes combined, leading to the same consequence and reinforcing each other. For instance, both the label and the direct contact with the producer or processor allow the customers to obtain product information and to have some control over the origin of the product, thus satisfying their need of security.

The relevance of emphasising specific product quality through direct communication to clients was observed in the case of "Fruitnet", a label for apples and pears from integrated fruit production. Customers of the farm shop which sells these apples found it important to eat these fruits with the peal, as it contains vitamins which they find essential for their and their children's' health. Customers of the supermarket who buy the same labelled fruits state that they always peel apples, out of fear for taking in harmful pesticide residues. They aim to achieve the same value, "living a healthy life", but via opposite Means-End-Chains. The difference can be explained by the personal advise at the farm shop, where the farmer and his wife actually advise people to eat the fruits as they are and they are readily trusted and believed. At the supermarket on the contrary, the communication is limited. It consists of the words "Fruitnet, integrated fruit production" and a drawing of a ladybird on the price label. Once in a while, the consumer finds an information leaflet in the punnets of apples, showing different development stages of the same insect. This rather technically inspired communication is clearly not conveying the message, customers buying labelled apples in the supermarket treat them as they would treat any other. This looks like an unexploited marketing opportunity : the Fruitnet fruit could be much better positioned.

2.2.3. Discussion of the 7 segments in the Consumer Decision Map, based on value-types

2.2.3.1. Value type SECURITY/POWER

In this segment, HEALTHY LIFE stands out as the most important value, shared by 95 out of 100 respondents. Natural and pure food helps to achieve this value, respondents refer to "natural" as the opposite of "industrial". "Pure" is often explained as "not tampe-red with, not forced". The concepts "natural" and "pure" in turn are the consequence of product freshness and absence of chemicals (additives, growth hormones, pesticide residues). Respondents consider these two as the most important attributes of products offered by the short market channels. The freshness and thus high content of vitamins is seen as resulting from the short market channel. The producers know quite well that they have this advantage : "direct from the farm to the consumer" is an often-used slogan.

Many respondents accept without further inquiry that these products are characterised by the absence of artificial hormones in beef, the non- or reduced use of pesticides on fruit and vegetables and the absence of preservatives or colouring agents in milk products. Some customers however require more guarantees with regard to purity and naturalness formalised by a label and proper control.

Different degrees of critical attitude in respondents can be observed between the initiatives. At the Farmers' Markets, started in the 80's, consumers are satisfied with "less pesticides are used", leaving it to the common sense of the farmer to determine what that means and trusting without further guarantee that the farmer is indeed selling his own grown vegetables. At the "Food Teams" which started only in 1998, the consumers insist that the vegetables should be grown organically. As they know that the higher price might tempt suppliers to offer conventional vegetables as "organically grown", these consumers want to be assured. Some say "we trust the network of organisations which initiate the Food Teams, if they say that the farm is officially controlled it is OK". Others want to see the "Biogarantie Label" on the products as a formal guarantee. In beef too, the label is important for some of the consumers as guarantee of purity, especially at times when the consumer's confidence is shocked by a scandal in this sector. Customers will usually rely on their butcher ("He would not sell me manipulated beef"), but at the top of a crisis they will ask to see the certificate of origin.

Also the artisanal production method of e.g. cheese and the seasonal aspect of the offer in some initiatives (fruits and vegetables at farmers' markets) lead to a healthy life via the concepts "natural" and "pure".

What is interesting to note is how the good taste contributes to good health, as it stimulates appetite for the "wholesome food". It should also be mentioned that for a part of the respondents health is not a terminal value. They add higher values such as feeling good and not having to depend on others at an elder age.

In the value segment SECURITY/POWER and related to HEALTHY LIFE, two other often mentioned values are SECURITY and CONFIDENCE. Consumers seem very concerned about their health and seek security from food supply chains in which they can have confidence, of which they can be certain that the food offered is indeed good for their health.

This confidence and certainty result from the possibility to exert a certain personal control, e.g. by occasionally visiting the farm or atelier where the food comes from and by having a direct contact with the producer or processor. Furthermore, the personal contacts and labels are useful for the customers, as they are sources of product information and a way to know the origin of the food, inspiring confidence. "I know where it comes from, I trust those people."

Several respondents stated that their preoccupation with health results from health problems they or their family members experienced, such as allergic reactions to food additives. Others have lost relatives or friends due to diseases such as cancer and feel like wanting to avoid such problems in their own life. "We already swallow so much stuff we don't know or can't avoid, such as air pollution for instance. So we want to have as much control as possible over the food we eat." Others have a more positive attitude. They are aware that a balanced diet is crucial for good health : "Working with aged persons I observe that many suffer from intestinal problems, which can be remedied by eating more vegetables".

Apart from looking after one's health, the value type POWER is partly realised by obtaining SOCIAL RECOGNITION through the friendly contacts at the points of sale. In all five initiatives, the respondents appreciate the personalised service and the time salespersons devote to talk to their customers. Regular customers get to know each other, which is another source of social contacts. "Here we meet friends from our youth, people we never visit, yet we still know each other because we meet here".

In the Food Teams, "re-establishing social life in rural communities" is a specific objective. There consumers take up several responsibilities in the market channel, such as managing the depot where food is weekly delivered, placing the orders and arranging for the payment to the producers. Sharing these responsibilities and functioning as a Food Team is a group process. Each team meets regularly to make practical arrangements. In addition, several teams set up social activities such as a farm visit or a barbecue.

2.2.3.2. Value type HEDONISM

HEDONISM is the second important value segment, after the rather utilitarian concern about health. Out of 100 respondents, 73 have stated that they attach importance to the value PLEASURE. Part of their motivation to buy food at the studied initiatives is based on the pleasure they derive from consuming tasty products. "Taste" is the consequence of a remarkable number of concepts, of which freshness and the natural and pure character of the food are the most important ones. Other attributes believed to lead to tasty food are the specific artisanal production or processing methods and the seasonal character of the product. "Strawberries are to be eaten in June, Brussels endives in winter. Food is at its best in its own season and each season offers us what our body needs". The relatively strong concept "quality" is also linked to the taste of the product and not so much to health related concepts. At the attribute side, quality is linked again to freshness and to absence of hormones, pesticides and additives.

In some initiatives respondents also derive pleasure from the way the market channel is organised, e.g. the atmosphere of friendliness and hospitality at the Farmers Markets, bringing visits to French or Italian markets in mind or offering a flash-back to contacts with rural life during the youth. These Means-End-Chains however have disappeared in the aggregated Consumer Decision Map as they are only present in a few initiatives.

2.2.3.3. Value type UNIVERSALISM

This segment is the third important. In it, three distinct values can be distinguished : PROTECTING THE ENVIRONMENT, WELFARE OF THE REGION and ANIMAL WELFARE.

Almost half of the respondents find environmental protection a value worth striving for, the Means-End-Chain "re-used or recycled packaging material by the initiatives- reduce waste problem - protecting the environment" is the strongest in this segment. This is not surprising, as both governments and NGO's have sensitised the public about the waste problem for many years. But also organic production guaranteed by a label, reduced transport of the regionally produced food and conservation of "environmentally friendly" farms provide answers to the environmental concerns held by some of the respondents, especially to those who purchase through Food Teams.

Welfare in the region through job creation is another relevant value in the Universalist section of the consumer decision map. Attributes of the initiative such as production within the region and the fact that the short market channel keeps farmers in business even if their farm is relatively small are in the view of the respondents indeed leading to such employment creation and regional development.

Finally, animal welfare seems to play a role in the Universalist section of the motivation structure. This seems to be an upcoming value in consumers' motivation, as in earlier research by Audenaert (1997) on the motivation structure towards beef this value did not emerge. But in the beef and dairy marketing initiatives studied here, respondents attach importance to good feed and living conditions for the animals, because "these are living beings as well, deserving to be treated well". Some customers mentioned the Means-End-Chain "animals well fed and treated - healthy beef and milk products - living a healthy life". In other words, they established a link between animal and human well being, but not strong enough to appear in this summarised Decision Map.

2.2.3.4. Value type ACHIEVEMENT

In this segment, the capability of LIVING AN ACTIVE LIFE both at professional and social (family) level is a value for which one fifth of the respondents strive. This value results quite strongly from the value HEALTHY LIFE as indeed one has to be in good health in order to work and to care for the family. The way these values are combined supports Schwartz's model (figure 1) where achievement and power are found together in the Self-enhancement Higher Order Value Type.

But also the consequence "save time, shop less" leads to the value "Living an active life", if one easily and quickly manages to obtain the desired quality, the time saved can be spent to other achievements. In this Means-End-Chain, the short market channel properties are crucial, in particular the freshness of the produce. If beef, fruit, vegetables are fresh, one does not have to go shopping every day. This is especially important to initiatives, which operate on a weekly basis, such as Farmers' Markets and Food Teams. Also the quick service and the availability of a reasonably broad assortment allow saving time. This section of the Decision Map confirms the general consumer emphasis on convenience, it is clear that inefficiency on the part of the initiatives will not be regarded very well by most customers.

2.2.3.5. Value type SELF-DIRECTION

In the initiatives this value results from the ability to SAVE MONEY without trade-off on quality. The good price/quality balance, attributed to the organisational model (short market channel) is relevant to more than 40 percent of the respondents. They "don't want to pay any price, but want to pay a just price for the given quality".

Some respondents also feel that buying from the short market channels enables them to be more CONSCIOUS CONSUMERS who do not waste time by running to different shops and avoid to buy unnecessary items e.g. when going to the supermarket.

2.2.3.6. Value type STIMULATION

The need for variation and excitement is partly satisfied through the assortment of specific farm products, which are found in these places.

2.2.3.7. Value type BENEVOLENCE

Under this value type the value WARM RELATIONSHIPS is found. This can be achieved through spending a portion of the "saved time" with relatives and friends, and through offering them tasty meals, a consequence which results from various attributes as described before.

3. COMPARING THE CONSUMER DECISION MAP WITH THE PRODUCERS PRODUCT CONCEPT

This section tries to answer the question whether, at the producer side, actors are aware of the benefits which consumers expect, and whether they put the right priorities in their product concept and marketing strategies in order to deliver and communicate those benefits.

The product concept is "a bundle of product benefits that can be directed to the needs of a defined group of consumers through symbolism and imagery. The product concept represents the organisation of marketing stimuli into a co-ordinated product position that can be more easily directed to consumers." Product positioning is "the actual communication of the set of benefits, through advertising and other marketing strategies" (Assael, 1998).

The term "product benefit" used in this definition is similar to the concept "consequence" in the MEC-theory. It is evident that a product positioning which fits into the strongest Means-End-Chains will be more successful than one which relies on weaker lines of thought in the consumers' motivation structure. As consumer values and thus expectations change, initiatives should adjust their product concept. This may involve searching new product benefits and investments in production methods. Insight in the Consumer Decision Map for the own and for other similar initiatives can therefore help to guide this product development, as the map gives insight in the consequences and values which should result from newly introduced attributes of the product or the short market channel.

3.1. Consumer Decision Maps as basis for marketing strategy

The Decision Maps related to each of the five short market channels give more detailed Means-End-Chains. This allows to make a more detailed and specific analysis per case and to give recommendations with regard to product development and communication strategies.

Interviews with the actors of the initiatives so far indicate that the strengths they perceive correspond quite well to the motivation of their current clients. However, there is scope to increase consumers' loyalty and to attract new clients, e.g. by exploiting the possibilities to satisfy upcoming consumer values (or trends), such as the need for security (food safety), the interest in eco-consumption and animal welfare or the renewed attention for "cocooning" or "warm relationships".

The marketing strategies could be improved by using the decision maps, whereby four strategies are recommended :

- First of all, marketing communication should emphasise strong Means-End-Chains, preferably combining hedonist and utilitarian values. Consumer motivation towards food (and towards most products) is never purely utilitarian nor hedonist. Therefore, a holistic approach taking both tendencies in human behaviour into account is most appropriate.
- Second, the product can be repositioned to better satisfy current customers and to attain new market segments. Marketers can do this by reinforcing chains, which are presently weak but have potential, e.g. by combining informal, personal sources of security with formal guarantees by a label and independent control. This will be illustrated in the Farmers' Markets example below.
- Third, the initiatives can establish new links in the motivation structure. For instance, currently consumers find labels relatively important as they lead to the consequence "origin known" and "security". However, the hedonist segment, with "taste" as an essential concept is stronger in the motivation structure, and there are new concerns emerging, such as animal welfare. Therefore possibilities to develop the label as a sign for "taste" or "animal well being" e.g. by adding certain clauses to the "cahier des charges" should be further investigated.
- Fourth, it can be of interest to add new attributes to the product or the marketing channel. If these new characteristics reinforce concepts that are currently strongly motivating consumers, this move may result

in a marketing advantage. For instance, direct contacts with producer/processor satisfy the need for security, and can also be a source of pleasure. Initiatives can increase "direct contact" by e.g. inviting consumers to an annual "farm visit and party" (new attribute) and stress this in marketing communication.

In strategies to promote production of public goods such as nature and a clean environment via organic farming or responsible farming etc, the main message should refer to the possible personal benefits such as family security, enjoyment of the public good etc.

3.2. Evaluation of the product concepts of three initiatives

3.2.1. Farmers' Markets

During a group discussion, members of two farmers' markets have mentioned several factors as "strengths" of their market channel. Products are always fresh and taste well ; the origin is always known as farmers sell only their own products ; direct contact producer-consumer leaves no room for poor product quality ; consumers do not search for the lowest price but are prepared to pay for good quality ; the assortment has expanded ; farmers' market stimulates co-operation among farmers and is managed in a democratic way ; consumer representatives defend the consumers' view in the management of the market ; the market is an interesting source of income for small scale family farms.

Overall, these concepts correspond to the ones detected in the Consumer Decision Map. Nevertheless, there seems to be one major gap, i.e. the natural and pure character of the products is not emphasised by producers. Although they make efforts (e.g. by not adding additives in dairy products), there is no clear definition of what is allowed and what is not. Customers currently do not insist on this, they are satisfied with the belief that the food "has been less treated with chemicals". However, this is a rather weak concept, as consumers become more exigent concerning the use of chemicals particularly in vegetables and beef. If the natural and pure character of the products is not reinforced, the farmers' markets may be on the losing side.

Another problem is that of the "known origin". For a producer, it is very difficult to have every week a wide assortment of fresh products, especially in vegetables and beef. Even at the model markets of Gaasbeek and Dilbeek (two Flemish cities) the actors admit that sometimes farmers break the rule of not buying additional supplies outside their farm. This weakens one of the cornerstones of consumer confidence. For the volunteers of the Market Commission who represent the consumers' interests in the initiative it is not easy to control such practices. The problem is recognised, as the actors mention that "some members have too much of a commercial attitude", and "the offer is limited, especially in winter".

This problem has made most of the 30 farmers' markets which existed in Flanders in the 80's to abandon the condition that only own products can be sold, so in fact they slowly convert into conventional markets. Most of them have even abolished the consumer representatives in the Market Commission. This corporatists' reaction from the side of producers has reduced the possibilities for a joint definition of what specific Farmers' Market quality means. As a result "Farmers' Market" failed to become a movement or a brand with a clearly defined content. In 1996, only 17 were still in existence, of which only 10 were optimistic about their future.

In a move to overcome the problem related to the qualification of the products the group of Gaasbeek proposes to set up a joint control system for the region in which it is situated and where several other Farmers' Markets still follow the authentic set-up.

In another move an "Organic Farmers' Market" started recently in Flanders, following the Dutch example where there are already several. The advantage of this approach is that the organic label "Biogarantie" formally guarantees quality, based on a trustworthy control. This would create room for producers to buy an agreed percentage of their assortment outside their farm without destroying consumers' confidence.

3.2.2. "Fermière de Méan"

Members of the co-operative processing and marketing dairy and goat milk products emphasise the following strengths : Many of the products sold are from a well-defined region and are typical products. Production is artisanal, the cheese is made from raw milk, without additives, natural, not standardised. It is a short market channel of a small scale, creating employment in the region and a source of income for farmers. The production methods take the environment into account and stimulate eco-consumption. The co-operative sells at reasonable prices : in other places, providing this quality is considerably more expensive. The customers also get a lot of advice and explanations.

This product concept corresponds well to what consumers perceive and appreciate. The co-operative members however did not mention the taste of the products. Also the "Biogarantie Label" as formal guarantee of origin from organic production was not mentioned in the group discussion, but the customers of this initiative attach quite a lot of importance to it. In fact the co-operative is trying to find a balance between organic and non-organic in its assortment. This is a difficult discussion between on the one side the salespersons who observe the consumer trend towards organic food and on the other side some of the farmers who resist the idea of introducing organic production systems. This discussion - or conflict of interests ? - was mentioned as a weakness, along with concerns about the service to the customers and the attractive presentation of the assortment. These aspects should still improve according to the group, although current customers are quite satisfied.

A last topic of concern is the economic viability of the initiative : the sales are not sufficient to cover all costs and the co-operative needs to get part of its budget from subsidies. For the time being it is not a big problem, as *Fermière de Méan* is recognised by the Walloon Government and by the European Union as a social economy project, entitled to support because of its job creation. It is clear however that in the mid-term *Fermière de Méan* will have to become economically independent, a goal which in their opinion can be achieved through improved commercialisation.

3.2.3. Food Teams

At a meeting of the Network for Food Teams[1], the following strengths have been listed : The products are fresh, healthy, trustworthy and of known origin. Ample information on the products is provided. The assortment is sufficiently large, the vegetable box contains regularly relatively unknown vegetables, stimulating consumers to cook in a creative manner. A Food Team is an opportunity for social contact and for taking up a commitment within the community. The local teams are backed by well-known organisations (the Network Food Teams), for problem solving and prevention from abuses. The initiative pays producers a fair price for these quality products, thus assuring a stable supply and contributing to the economic viability and conservation of this kind of farming. The Food Team reduces the number of visits to shops and supermarkets, consumers become more aware and critical.

These characteristics are prominent in the consumers' motivation too. Other values mentioned by the consumers but not by the co-ordinators of the initiative, are the good taste and consequent consumer pleasure, a sentiment which is also generated by contacts with rural life. However, in general the hedonist segment is weak and it could be developed to increase loyalty of current consumers and attract new ones.

Consumer values of the Universalist type are present in the Decision Map, but are not explicitly mentioned as a strength. Although the number of Food Teams has grown rapidly until 1000 families and producers in two years time, the impact on the environment remains small.

The backing by an organisation is seen as a strength, but yet there seems to be a problem. As in *Fermière de Méan* a number of transaction costs at the start of a Food Team can not be charged either to the producers or to the consumers. The Network is bearing these costs, part of the expenses are financed by an agreed contribution from the producers and the various teams. But once a local team is functioning, the role of the Network becomes less evident, reducing the willingness to pay contributions. Therefore the services by the Network to the respective Teams should be reinforced and a correct compensation agreed upon. As to the costs of starting new Food Teams, the Network hopes to obtain external funding, e.g. in the frame of government efforts to promote sustainable agriculture and rural development.

4. CONCLUSIONS

This paper has shown how a Consumer Decision Map consisting of interlinked Means-End-Chains can contribute to illustrate how concrete attributes of specific quality products and short market channels help consumers to strive for certain Cultural Values. Concerns over health and the desire for pleasure are the most important values in the consumer motivation towards the initiatives which were studied. The consumers consider product freshness, taste, known origin and the natural and pure character of the food as key factors in achieving those values. A combination of formal labels and more personal direct contacts are the best way to increase consumer confidence in the initiative or brand.

In the customers' motivation structure towards these initiatives, a relatively important Universalist section can be observed. The motivations relate to environmental protection, regional development and animal welfare.

Most of the attributes which consumers find essential are found back in the product concept as developed by the producers. This indicates that the current customers recognise the specificity which producers try to put in their products.

The Consumer Decision Map can be of use in various manners :

- First, it can be used as a basis for product development. Initiatives can for instance add attributes to their products and production methods which contribute to achieving the Universalist values which may gain importance over the coming years. It is essential that initiatives adapt to the evolving consumer values and needs. Otherwise the customers' loyalty may decline and it will be hard to attract new customers.
- Second, the Consumer Decision Map can be used as a basis for marketing communication. Promotions should stress strong Means-End-Chains and should pay attention not only to the attributes but also to the consequences and values which consumers can enjoy when shopping at such initiatives. This general Consumer Decision Map can be compared to the Map of each separate initiative in order to highlight potential new marketing opportunities.

Most initiatives are known only by a small group of consumers and there is a relatively high threshold to attract new customers. As expressed by Lassaut and Sylvander (1997), attracting customers means changing their preference and involves a "cognitive" kind of marketing. The general Consumer Decision Map can be of use in joint marketing communication efforts at regional level as part of an overall move towards rural development.

NOTES

(1) The Network Food Teams consists of Vredeseilanden-Coopibo, a Development NGO and Elcker-ik, an organisation for Socio-Cultural Work.

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