Consumer Perception of Typical Food Products in Europe

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Abstract

Formerly neglected, typical food products nowadays support a higher involvement of an increasing number of farmers as well as they seem to be in phase with consumers' expectations. Since directives 2081/92 and 2082/92 European Union had set up PDO and PGI labels as means of valorisation with benefits to typical food products. This paper aims firstly at considering typical food products with respect to consumer perception and secondly at pointing out some methodological results on consumer survey approach. The conclusion is focusing on the commercial development of typical food products.

Keywords : Typical Food Products, Consumer Perception, Agro-food Marketing.

CONSUMER PERCEPTION OF TYPICAL FOOD PRODUCTS IN EUROPE

Agriculture spent a long time to consider typical food products as a way of diversification. Formerly considered as an epiphenomenon, typical food products nowadays support a higher involvement of an increasing number of farmers as well as they seem to be in phase with consumers' expectations. Since directives 2081/92 and 2082/92 European Union had set up PDO and PGI labels as means of valorisation with benefits to typical food products. This paper aims firstly at considering typical food products with respect to consumer perception and secondly at pointing out some methodological results on consumer survey approach. The conclusion is focusing on the commercial development of typical food products.

1 SOME RESULTS ON CONSUMER PERCEPTION OF TYPICAL FOOD PRODUCTS WITHIN EUROPE

When focusing on consumer perception of typical food products within Europe, we cannot found the European consumer of such products but a splendid mosaic with a great diversity of consumer responses. The results are obviously different from countries but seem to also differ depending of the kind of survey. Within the scope of consumer approaches we have to distinguish between declarative survey, different from focus-group-based survey also different from scanned data panel.

1.1 Results from a pan-European declarative survey

Few is known about consumer attitudes towards typical food products in Europe. One of the rare surveys focusing on this topic is RIPPLE. RIPPLE was a FAIR3 programme (CT96-1827) focusing on Regional Images and the Promotion of Quality Products and Services in the Lagging Regions of the European Union and gathered laboratories from UK, Spain, Ireland, France, Finland and Greece. Data from the last country were missing on consumer survey.

The consumer survey used a sample of 1500 subjects with face to face interview about consumption of regional high quality products and services (QPS). There was no clear distinction in behaviour patterns between consumers from Northern and Southern European states, and rather than presenting a marked typology, the results suggested a set of indistinct groups partly overlapping (Trognon *et alii*, 2000).

Table 1: Sensitivity analysis of purchase frequency

Maximum frequency of purchase of QPS	observed in
For festive occasion	Finland
Less than once a month	Ireland
Once a week and less	France
More than once a week	Spain

However some interesting results can be highlighted. The analysis for the probabilistic relationships existing between socio-demographic, perception, knowledge and behaviour showed that the general QPS purchasing behaviour varied according to the country of residence. From a marketing perspective, such a finding is to be expected, as the behaviour of consumers is influenced by environmental issues such as culture, tradition and heritage.

Table 2: Sensitivity analysis of purchase location

Maximum frequency of purchase of QPS	observed in
From producer	Spain
In supermarket	France
In small shops	Finland

The consumers that considered a QPS as mainly a product with an official quality mark were most frequently found in Finland. Consumers ranking it in a lower position or not at all were most frequently found in UK. The consumers that coupled quality with a geographical area were most frequently found in Spain and France. The consumers that ranked it in a lower position or not at all were found most frequently in Finland. The consumers that considered presentation as an indicator of quality were most frequently found in Ireland. Consumers who ranked it in a lower position or not at all were most frequently found in Finland.

Looking beyond the impact and influence of country of residence on consumer behaviour, other factors were found to have an influence. The age of the consumer was particularly influential when purchasing QPS, mainly on the criteria for perceiving quality and differentiation factors. Other socio-demographic factors to be considered included the source of the main income into the household, and the educational level of the respondent. The level of knowledge and awareness of QPS were also very important in determining consumer behaviour.

With the perception factors, differentiation of the QPS from other similar products was influential. It would therefore appear that QPS consumers prefer the visual confirmation of quality through the official certification, which in turn influences the perception of product attributes and the comparison with other products in the market-place.

Moreover, depending on the country, the most motive factors were not the same. Location of residence relative to the study region was one of the most motive factors in France, the UK and Finland but it had very little influence in Ireland and Spain. The gender factor had very little influence in France, the UK and Finland whereas it was important in Spain and in Ireland. The level of education of the respondent and the main source of income into the household were also important according to the country. Both were very motive variables in France and the UK. Only the level of education was important in Ireland and Finland and the source of household income was very motive in Spain.

1.2 Results from surveys based on focus groups

Within the scope of consumer sciences, the objective measurement of attitudes with respect to food is a hard challenge. One programme has taken up this challenge: CAT. AIR-CAT (CT94–2481) was a concerted action focused on *Measurements of consumer attitudes and their influence on food choice and acceptability.* During the workshop organised on *Consumer attitudes towards typical foods* several papers were presented from Germany, Spain, France, Belgium, Ireland and the Netherlands (Giraud, 1998).

The preference for food products from his/her own region is pointed out by each study. This preference concerns particularly origin labelled food products in France, regional products in Germany and Spain and on farm processed food products in Belgium and Ireland. Willingness to pay a higher price for such food products seems to be positive in Belgium, Ireland and Germany and negative in France and Spain.

Based on six countries and different products, the results are congruent on the fact that the regional origin of a product may be a decisive criterium in the buying process, only if the differences between the product alternatives are low. Especially, if the competing products are strong brands, the preferences for products of the own region are expected to be less pronounced. For main of respondents the origin label is a competitive attribute judged at the same level than the price and the brand (observed in Germany, France, Belgium and Ireland).

Results from Germany, France and the Netherlands highlight that the preference for food products from his/her own region is more based on a regional image rather than on familiarity with products. Nevertheless the preference for food products of the own region seems especially high for fresh or raw products, lower for cooked products and very low for preserved food.

1.3 Results from survey based on Consumer scanned data panel

The originality of this kind of study is the method that can obtain data on the sensory preferences, declared behaviour and actual purchases from the same consumers. Using private cards set up by supermarkets, the bar code of a product can be linked to the customer card at the cash register. It is thus possible to identify who buys what, when, how and how much (Giraud *et alii*, 2000). Based on the principle of *single source data* this kind of survey is called consumer scanned data panel.

Used in France such a protocol gave interesting results. The aim of this programme was to study the purchasing behaviour of consumers towards typical food products compared to commercial brands or distributor brands. The survey - supported by DGAL (Food National Board), French Government (programme Aliment Demain R97/07) - was focusing on Camembert cheese and dry pork sausage.

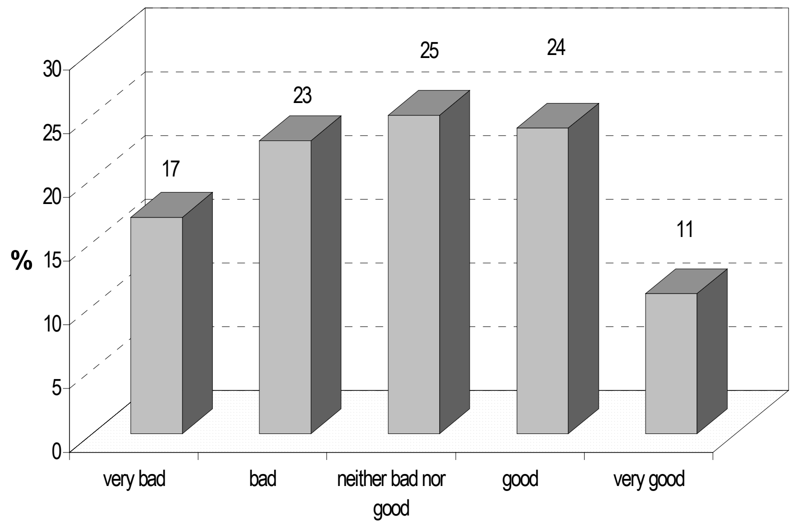
Table 3: Distribution of panel's purchases over one year

Product category	Camembert cheese	Dry pork sausage
Commercial brand	50,5 %	68,7 %
Distributor brand	29,9 %	22,8 %
Origin labelled	11,4 %	7,1 %
Lowest price	8,2 %	1,3 %

The distribution of the panel's purchases according to the product category and to the consumer type shows a great specialisation of the choices. The *Connoisseur* type makes 79,2% of his/her purchases in the typical food products category. The *Brand prone* type directs 83,1% of his/her purchases towards commercial brand category. The *Rational* type chooses 76,2% of his/her products among the distributor brand category. The *Thrifty* type buys 77,4% in the lowest price category. Variety seeking seems quite narrow among the panel.

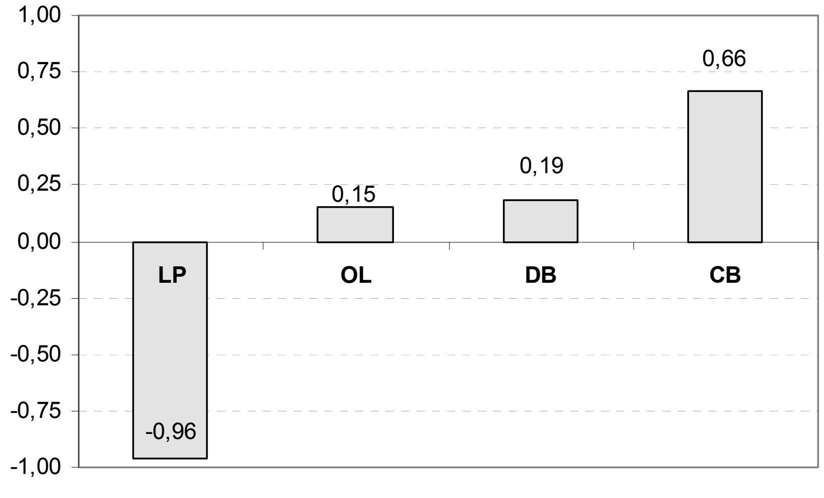
In spite of 19 different brands offered on the shelves of the three shops in camembert and 15 in dry sausage, the panellists - who buy 6 different brands or less in cheese over one year and three different brands or less in sausage - make 80% of the total purchases of the whole panel. The choice sought by each one is restricted even if the distributor must present a very broad range to satisfy all the customers. And the origin labelled products do not always belong to the consumers' purchase set.

Figure 1: Hedonic ratings (%), Camembert with PDO, n=306 respondents



Typical food products seem to be differently appreciated during hedonist blind tests, and to take few advantage of their identification. They are important for the credibility of the store, but do not attract a large number of customers: sales seem to be more related to the consumer loyalty than to the number of consumers buying them.

Figure 2: Brand name effect: hedonist ratings differences between blind and identified product tests, 173 respondents



Legend: LP lowest price, OL origin labelled, DB distributor brand, CB commercial brand

Another important result is related with the influence of received information on consumer ratings. For the last hedonist test, consumers had the possibility of reading the name of the products, and gave higher ratings to well-known labelled products (commercial brand) than during the blind test. Distributor brand and even more typical food products do not take such an advantage of their name. Lowest price products obtain lower ratings when the test is led with identified products.

The whole results show that, over one year, consumer purchasing behaviour proves to be routine and almost automatic. This is favourable to the dominant brands. The choice of consumers oriented towards typical food products is based on a fuzzy typicality: demand for taste but ignorance of the meaning of label of origin and limited variety seeking. The appreciation of consumers appears closely linked to the social image which the brand conveys. The buyers of typical food products constitute a restricted group. The purchases of this small group are stable and highly oriented towards typical food products. The gustatory judgement of these buyers is more severe. Overall, purchasing behaviour is rather related to sensory preferences. We are now looking for the implementation of this experimental protocol within the EU.

2 DISCUSSION

All these results have a common point: socio-demographic criteria are existing but weak predictors of purchasing behaviour with respect to food. None attitudinal significant explanation of purchasing behaviour was found.

2.1 Halo effect and fuzzy perception

Consumer perception of typical food products seems to be based on regional image rather than on deep knowledge of products. We found both preference for his/her own region and some acceptability of foreign typical food products when they are customised. Outside its area of production and its customers zone, an origin labelled product is perceived in a wider eating mode and represents a foreign culinary area. Although the Spanish consumer can obviously differentiate between products from Andalusia and Catalonia, this is not the case for tourists.

Without knowledge or familiarity with a typical food product consumers base their judgement on more general information they have about the country of origin of the given product. When the country is well-known or when its reputation on food is well established there is a halo effect that lead to a favourable consideration of the given typical food product.

It seems that provenance and origin are similar for most of people. On consumer standpoint typical food products, speciality foods, on farm processed food products, local foods and sometimes organic foods are typical food products (Sirieix, Schaer, 2000). Consumers are looking for products from somewhere. It is not sure that they can differentiate PDO and PGI labels.

On a sensory way there is a great discrepancy between consumers' responses towards typical food products even in the same country. They like or dislike typical food products in blind tests. On a cognitive way we observe a very low knowledge of typical food products and a low memory of brand name. Consumers seem to have a distant idea of product history and have often reluctance for process information in case of animal production.

2.2 Under influence of context

Unfortunately food crisis (Listeria, BSE, Dioxin, Foot and Mouth Disease) have a very short term influence on typical food products consumption. But this good effect is limited by the negative context of each scare episod.

2.2.1 Heliotropic effect

There is a kind of schizophrenia between tourist looking for explanations on process of typical food products during holidays, consumer hedonist sensation seeker and buyer paying attention to the price once arrived in daily shops.

During sunny holidays typical food product is always very good and fully tasty when eating it with friends. Came back at home during ordinary life typical food does not give same taste because it does not have the same sense. For some ones it becomes too strong, far away their own palatability. Those who still like it meet some difficulty to find it in shop and this product becomes suddenly too expensive. On a marketing standpoint we have to develop the heliotropic effect in favour of typical food products during tourist period.

2.2.2 Survey effect

What consumer surveys measure are verbal responses to questionnaires. Each specialist of survey will confirm it to you: anybody will answer anything about any purpose so long as the interviewer will be smiling face to interviewee. Usual surveys only can measure verbal responses, sometimes they reach attitudes but very often loss behaviour. Even in sensory analysis we have an experimental context that may introduce some trouble in measurement. We need high number of tests to reach significant results.

This is the main reason why the protocol called "consumer scanned data panel" was built and implemented to measure actual behaviour and to compare with verbal and hedonist responses. It is measured that for the same panellists attitude and behaviour are not similar. This is a general result in food behaviour because attitude is cognitive managed and food behaviour is affective oriented (Köster, 1996). But it is obviously true for typical products that are more in charge of social status and more subject of ostentatious functions in social life.

The results of scanned data panel are very interesting about the comparison between actual purchases, hedonist preference and verbal responses of each panellist on his/her own purchasing behaviour. In the French study, only 8,9% of the panellists have a high frequency of actual purchasing of typical food products, but they are 31,7% to prefer typical food products in blind test and they grow to 55,0% to declare a positive attitude towards typical food products. On the "dark" side, 78,3% of panellists did not buy any typical food products over one year, they are 38,9% to reject typical food products in blind test, but they are only 1,1% to express a negative attitude against typical food products during face to face interview.

For other categories of products, the trend is the same. Consumer responses are more often negative in actual behaviour and become quite favourable in a declarative way, the sensory responses are more balanced. Verbal responses of consumers seem to be strongly linked to social image carried by brand status.

This declarative effect remains ambiguous regarding to the majority of market studies that are based on face to face questionnaire. The identification of declarative effect is congruent with previous results (Verbeke, Viæne, 1999) on high quality label for beef meat. Finally neither gustatory preferences nor declared preferences appear to constitute reliable predictors of willingness to buy.

3 CONCLUSION

3.1 A niche market

Origin labelled food products are a niche market in Europe around 7 – 9% of overall food consumption. With specific strong and long term marketing plan we can guess to reach 15%, no more (Giraud, 1997). We have to adapt marketing action to such a niche market. This adaptation needs to use new expert models and small scale of investigation and action. It seems that it will be very difficult to increase the consumption of current consumers. But we have to enlarge the scope of consumers by using the heliotropic effect. Marketing plan on a given typical food product has to find new consumers first in the cities in the country of origin and secondly throughout EU where exists a real curiosity towards food ways of neighbours, a kind of exoticism.

3.2 Consumers and producers approaches differ

Consumers' approach of origin labelled food products differs from producers' one. Producers and most researchers too are focusing on origin with a territorial voracity (Tregear, 2000). Consumers are focusing on origin label with a confidence voracity. The definition of strict rules to obtain origin label is obviously necessary. But it is so far away from consumers' hedonist perception. We are thinking about origin labelled food products while consumers are only eating them. Consumers give an affective response not a cognitive one towards typical food products.

3.3 Prescription

Marketing with description and analysis is only academics, we have to rub shoulders with market realities. *Strong brands ever test better*. A good case study of campaign of promotion of origin labels is given in Spain (Albisu *et alii*, 2000). We have to promote origin label (reputation is repetition) and to encourage local brands from micro regions - that do not mean anything for consumers - to merge. According to Miller's rule advertising has to be enhanced in order to reduce the number of promoted attributes of typical food product.

We have to be pragmatic in order to take care about orthodoxy: what is the origin of a food product? We do not scientifically know what is tradition: Is it the memory we have? Is it the story we imagine? Or is it the image of ancient practices we can agree?

Where is tradition come from?

- In Vienna everybody can eat an escalope of veal with breadcrumbs. It is called the typical *Vienna* escalope. In Prague we can eat the same dish, called the typical *Pragua* escalope and in Milan it is called the typical *Milanese* escalope. Is it the typical dish for tourist in the ancient Empire of Habsbourg? In France we can also eat this piece of tender meat, it is very common and looks like a traditional dish.
- In June in the Valais (Switzerland) farmers organise cowfights every year. This typical event is used to determine the Queen of the herd during mountain pasture. The breed of Herens is splendid but not so productive in milk nor meat. In this region farmers want to develop an origin labelled cheese called "Raclette du Valais". It is a long and hard challenge. It is very interesting to learn that in this high valley the cheese maker is a French guy graduate from the national technical school of dairy industry in Savoie.
- This detail seems very close from an other from Auvergne in france. At the beginning of 20^{th} century the local authorities imported around thirty families from Switzerland to develop cheese production in Cantal with know-how from Gruyere. Fortunately these immigrants did not make gruyere. They built small local dairies and developed Cantal cheese production. Nowadays after three generations of swiss families Cantal cheese is an excellent and origin labelled product and French farmers are very proud of it.

If we want rural development we have to remember that sustainability needs added value from its own activities. The level of price of typical food products allows to generate added value. If the objective is rural preservation we just need subsides. But subsides are not sure on long term Agenda 2000 and new CAP do not support them. Normalisation is necessary against global free market. When defining the origin of a product, for instance area of production or provenance of raw materials take care about potentiality of local added value. Overzealousness, intellectually or politically satisfying, can kill the market and rural development: we have to be pragmatic.

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