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“Marketing red meat in the European Union: extending the options”

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1. INTRODUCTION

1.1. Consumer profile and trends

The past trend

In the first decades of the post-war period, meat consumption in Italy increased very rapidly due to the increasing income levels during the boom in economic development. Between 1946 and 1992, meat consumption increased by more than six times, reaching a maximum of 85 kg per capita in 1992. Although this phenomenon can be noticed all over Western Europe, a typical Italian characteristic has been the strong preference for beef and veal over other meat types like pork and poultry, despite its higher price on the market. The reason for this predominant position has to be related to the higher nutrition value of beef with respect to other types of meat and the central place of beef in the traditional Italian menu. Up till the eighties, in the second course of the traditional lunch beef and veal were preferred over alternatives like cheese, fresh pork or ham. Consumption of beef and veal in this period increased the status symbol and prestige of the consumer.

In the eighties, and in particular in the nineties, the image of beef started to decline and after 1990 per capita consumption of beef showed a downward trend.

The recent trend

Over the last few years, the decline in beef consumption in Italy has continued throughout the various regions of the country, though not always in a linear way, despite the fact that the price has tended to be lower.

The figures show a more accentuated fall of consumption in 1996, caused by the first wave of BSE.

For the year 2000 specifically, the estimates seem to show a decrease of almost two percentage points on the quantities sold and of approximately 3% as regards sales values.

In particular, the average interval between one purchase and the next has lengthened, increasing from 12.5 to 14 days. The average quantity purchased per act of purchasing, on the other hand, has remained substantially the same (indeed, there has been a slight increase).

Also in terms of the incidence on the meat sector overall, beef consumption has declined, in favour of poultry first, then pork, and finally other meats which are quantitatively minor.

Per capita beef consumption in Italy

	1995	1996	1997	1998	1999	2000	% var. 2000/1999	mean annual % var. 2000/1995
kg	25.9	23.6	24.2	24.0	24.0	23.5	- 2.1%	- 1.8%
000 lire	203	172	175	186	184	178	- 3.3%	- 2.4%

Source: processing of data from Databank, Ismea, Istat, Nielsen; our estimates for 2000

Characteristics of domestic beef purchases in Italy

	1999	2000	var. %
average price (lire/kg)	15187	15032	-1.0%
kg per purchase	0.98	0.99	+1.0%
purchasing interval (days)	12.5	14.0	+12.0%

Source: processing of data from Ismea, Istat, Nielsen

Beef consumption per type

Within the beef sector, the distribution by type of meat consumed shows the following situation:

- About 82% of the red meat segment of the market can be attributed to beef and veal consumption.
- The decline of beef and veal consumption in the nineties is entirely due to the disaffection towards red meat and in particular of beef derived from bulls and heifers.
- Veal consumption covers a significant share of the market, and its per capita consumption remains stable. Consumers continue to be attracted to this meat because its white colour is associated with freshness and tenderness.
- Per capita consumption of beef from cull cows did not decline, and this may be attributed to the slow but steady increase of the fast food circuit in Italy, where minced beef derived from cull cows finds its way.

Although beef from bulls and heifers remains the most important fresh meat cut on the market, it is this type of beef in particular which suffers competition from fresh pork and poultry. In the period 1992-1998, its consumption declined by 13.6% and although the BSE crisis also contributed to this reduction, the declining trend had started already years before.

Beef and veal consumption per capita per type of meat

	kg
Beef bulls and heifers	15.8
Cull cows	3.4
Steers and bulls	0.5
Young calves (veal)	4.4
Total	24.0

Source: ISTAT data processed by CRPA

Extensive competition

In the past, upward or downward trends for the single types of meat could be explained almost exclusively by the development of economic factors (first and foremost per capita income).

Today, the consumption trends are produced primarily by non-economic variables.

In the identification of substitute products, if we consider the internal competition between the different types of meat and the competition from other products of animal origin (cheese, eggs, fish, milk, and yoghurt), as well as the indirect competition from other foods of plant origin (vegetables, legumes, fruit, and pasta), then we can affirm the importance of the return to the Mediterranean diet, which has spread widely among consumers by various means.

The cyclone of the Mediterranean diet, supported by strong scientific backing and by an image of naturalness, clouds the red meat market and favours the consumption of vegetables, fruit, olive oil, and cereal grains.

The reaffirmation of this dietary model has found a point of strength in the growing awareness of nutritional excess and in the increasingly frequent concerns regarding the link between high meat consumption and problems of cholesterol, cardiovascular disease, and metabolism disorders.

Fish, too, is benefiting from the consumer's tendency to shift quotas of the nutritional requirements from animal products to vegetable products. In the consumer's experience, fish is not considered to be "meat" to all effects, but a food that is halfway between meat and non-animal products. We could imagine a continuum, in the mind of the consumer, which starts from red meat and moves toward white meat, then to fish, cheese, and so on to other foods.

The destructuring of meals

In its role as the central dish of the traditional meal (especially as regards lunch), beef cannot help but feel the negative effects of the destructuring of meals into small and faster moments of consumption.

Italian women have shown a growing inclination towards employment outside the home, and the rates of working women are increasingly closer to those of men.

At the same time, the reduction of the size of the nuclear family leads to a lower incentive to dedicate energy to cooking.

The transition to a society with characteristics that are increasingly post-industrial has generated a strong demand for meals outside the home to be consumed quickly. Even when the new lifestyle enables people to have lunch at home, it tends to be more and more individualised (the tendency for family members to eat in different ways or at different times).

As regards beef, the growing search for foods that are quick and easy to prepare has translated into a reduced frequency of dishes such as stews and boiled meats, in favour of simpler dishes such as the usual classic cutlets. A clear demarcation has thus been created between the two main moments of eating:

- on one hand, the more convivial moment, in general on Sundays or holidays, where red meat has an important place;
- on the other hand, the hurried daily meal in which red meat is included only in certain ways (grilled, pan-fried with butter or oil), with consequent effects of monotony (not by chance, a number of motivational surveys have underscored the link between the word "monotony" and beef). Moreover, the practice of reducing the fat content of beef by genetic improvements and the increased use of maize silage and beet pulp on intensive beef farms in order to reduce production costs have deteriorated the organoleptic characteristics and the consistency of the meat.

The concept of product/service

The evolution of these social models has led consumers to prefer products with services incorporated.

It is precisely certain products that can substitute red meat which have demonstrated that providing service to the customer is a success factor.

The addition of fresh fish counters in the large supermarkets and the spread of processed and packaged fish products have considerably changed the attitudes of Italians toward this product.

In the modern sales points, a third of the salt-water fish and a full half of the fresh-water fish is purchased already cleaned, filleted, portioned, vacuum packed or, more recently, packaged under modified atmosphere. This has made it possible to overcome the consumer barrier related to time-consuming and difficult preparation.

In the poultry segment, the products of greatest added value (fourth and fifth range) now have a share of almost 20%, compared to the 4% of ten years ago.

In the area of red meat, only a few producers have launched products with service incorporated; i.e. fourth range meats, in innovative packaging, ready to cook in a few minutes. It is estimated that not even 5% of red meat enters the third and fourth ranges.

Scandals and health concerns
But the most burning and current issue is related to health concerns (first the use of hormones and now mainly the recent BSE crisis). These questions have demonstrated the importance of the consumer's trust, a factor which is truly crucial for the development of any market. Consumers are currently extremely suspicious and diffident toward the meat they purchase.
The worsening of the nutritional image of red meat in the consumer's eye has also arisen in a moment in which attention to the naturalness and healthfulness of foods is constantly growing.
Nonetheless, this increased attention takes place without a concurrent renunciation of pleasure. In effect, in Italy we have moved quickly from a dietetic perspective to a "light" perspective, i.e. from the pharmaceutical to the alimentary area.

Local consumption patterns
Similarly to the large variety of beef production systems, consumption patterns are also highly differentiated. The figure below depicts different styles of beef consumption and their possible relationship with different quality assurance schemes.

Styles of beef consumption and potential quality assurance schemes

Innovation

Industrial innovation Snacks | Attention to weight ***Organic and controlled beef***

Complete meals

Fast food | Nutritional awareness

Greediness | Vegetarian diet

Impulsive | **Self control**

Mediterranean diet

Tasty food

Food localism

PDO/PGI | ***Animal welfare***

Tradition

Source: Free adaptation of Miele & Parisi (1997)

These styles and attitudes towards beef can be distinguished all over Italy, and they present possible keys for the development of quality assurance schemes in this country. It should be stressed, however, that these consumption patterns are not present everywhere to the same extent. Substantial regional differences can be seen in beef consumption patterns, where one of the four styles predominates over the others. The following sub-areas can be identified, each having its own specific local consumption characteristics:

1. *Northern Italy, except for the Piemonte and Romagna Regions*
   This is the area where the most important and largest slaughterhouses are concentrated. Beef consumption in this area relies mainly on the supply coming from large intensive beef farms and on imported beef. The large bulk of beef consumption takes place here. In most regions of this area, however, average beef consumption per capita is more than 10% below the national average. Local consumers are more pork oriented (both processed and fresh) than beef oriented and they are less acquainted with high quality beef than consumers of central Italy. The supplied beef quality tends to be highly standardised. In this sub-area consumers tend to be more open than in other areas to innovative products and organic beef.

2. *Piemonte*
   Particularly in the rural areas of this region, consumption is traditionally related to beef derived from the local Piemontese beef cattle. Lean and tender meat without a strong pronounced taste are the characteristics of this breed, and the consumers of this sub-area are traditionally attached to this type of beef quality. Beef consumption levels in Piemonte are 10% above the national average.

3. *Central Italy and Romagna*
   This is the area where the local high quality beef breeds are raised (Chianina, Marchigiana and Romagnola). The Tuscany, Marche, Lazio, Umbria and Romagna regions belong to this area. In these regions, per capita beef consumption is the highest in Italy, reaching levels which go over 10% of the national average. An impulsive and traditional style of consumption prevails, where strong tasting beef based on the local breeds[1] is appreciated. The BSE crisis has reinforced this style of consumption even more and the demand for beef of the local breeds is increasing in this area. Already in the eighties, quality assurance schemes were set up by beef farmers and butchers in order to highlight the local beef breeds and to capture extra value added in the beef supply chain, which faces a consumer who is sensitive to beef quality and is more than willing to pay for it.

4. *Southern Italy*
   More than in the previous areas, consumption in the southern part of Italy is more price oriented. Local beef breeds (Podolica) are promoted, but the limited willingness to pay and the less well-defined quality of the local breeds are hampering these initiatives. Beef consumption levels in the South are on average about 5% below the national average, but in some regions (Calabria, Molise, Basilicata) this figure is almost 20% below the average. The majority of beef supply comes from the northern Italian regions or from abroad.

[1] The "bistecca fiorentina" (Florentine steak) derived from Chianina cattle is a well-known local dish which is highly appreciated by local consumers as well as tourists.

1.2. Media impact on consumers

The recent developments of the BSE affair have confirmed the extent to which Italian consumers are susceptible to the food scandals and, from this point of view, highly receptive.
The news spread by television and newspapers causes a substantial shift toward alternative foods, and this occurs in particular when the consumer lacks a certain information base acquired outside the scandalistic news and assimilated over time.
This is precisely the situation that characterises beef. First of all, it is a product that consumers are often not able to evaluate by means of a simple visual examination. Moreover, little information is actually available in terms of classic advertising in the mass media as well as brochures and other informational instruments which could, on the other hand, accompany the product in the sales points.
The newspapers and television mention beef mainly in relation to scandals, when the consumer is not in an state of mind to interpret the information correctly.

In the most critical moments in which problems related to BSE, hormones, and so on arise, consumers demonstrate a sense of confusion and of bewilderment in the face of headlines that report hidden dangers and harmful substances, in terms of both health and environmental aspects. Once a certain amount of time has elapsed following the onset and emergence of the risk of negative effects on consumers' health, consumption behaviour tends to return to the normal standards, settling on a position of compromise. Nonetheless, every scandal leaves traces that are not entirely erasable.
Individual consumer behaviour thus becomes everything but uniform, a sort of personality in layers, where the new layer overlaps the others without their having been actually internalised at the emotional level, and this leaves room for contradictions and uncertainties in attitudes; for example, between the rational sphere and affective sphere.
This gradual modification of consumer attitudes has more marked effects especially if the event-stimulus penetrates individual life, into the private sphere of the consumer, thereby creating personal worries.
In other words, with respect to safeguarding one's own health, respect for the environment or for the social context generally moves to a clearly lower priority level.

Correct and systematic communication is one of the most hotly debated issues in this sector. Each individual involved in the sector fears that generic messages can benefit everyone, and no one wants to take on this burden.
This is particularly true in the Italian market, where beef is prevalently an unbranded product. In other sectors and/or other countries, market launches of new meat products, with the respective advertising campaigns, have created a positive fallout on overall consumption in the sector, also due to the frequent use of "umbrella" brands related to the entire product range.
The Italian problem derives from the fact that beef has deep roots in the traditions of large groups of consumers, who therefore assume somewhat traditional attitudes: the appreciation of a significant level of incorporated service occurs in parallel with the negative experience of any distancing from the original presentation of the product.
The contrast between the appreciation of greater practicality and nostalgia for the product "like it used to be" should be resolved with a sort of compromise rather than by adopting extreme solutions.
To overcome this contrast, the industries that propose processed products containing red meat implement communication strategies designed to underscore a series of benefits in

addition to those related to time savings and easier work in the kitchen; for example, the perfect hygienic conditions of the product or the balance of nutritional features.
To overcome the obstacles posed by those in charge of family purchases, products are often presented which are only partially ready-to-use; i.e. which allow some personalization. In this context, the communication is focused on maintaining the role of the person who prepares meals for the family, while eliminating the simplest and most tedious procedures. Here, providing recipes and suggesting different cooking methods could represent a further plus.

2. RESULTS (THE SURVEY)

Results of the quantitative analysis in Italy

The survey involved twelve cities throughout Italy with their respective rural areas, subdivided equally into four survey areas (1 = north-west; 2 = north-east; 3 = centre; 4 = south). The sample of interviewees, a total of about 500 consumers, was stratified by age and sex.
On the basis of the place the meat was purchased (supermarket or butcher's shops), the sample was subdivided into substantially equal parts, with a prevalence of large supermarkets in northern Italy and of butcher's shops in the south. In southern Italy, in fact, there is a general prevalence of the custom of purchasing in small sales points, also due to the lower number of large supermarkets. The same affirmation can be made for areas having a lower population density with respect to large cities.
An interesting statistic that emerged from the survey is that only 1.92% of those interviewed do not consume any type of meat, with the main reasons given being the desire to not kill animals and concerns regarding the effects of this type of food on health and the safety. More or less for the same reasons, 0.98% of the consumers interviewed do not purchase beef.
To the question "Do you eat more or less beef than you did five years ago?", 46% of those interviewed answered "less", and this share had higher proportions in northern Italy. The reasons given for the decrease in beef consumption included: fewer family members; that beef is a kind of meat that does not satisfy people's tastes, they don't like it; and the conviction that red meat is not good for your health.
11% of those interviewed said that they eat more beef than in the previous years. The reasons given are the same in the inverse as those stated by the consumers who have reduced consumption; i.e. the number of family members has increased; they like beef; they are convinced that beef is nutritious, that it is good for your health.
One of the most interesting maps that can be made using the information available involves, on one axis, the frequency of red meat consumption (heavy consumers vs. light consumers), and on the other axis the quantitative evolution of red meat purchases over the last few years.
From this perspective, four groups can be identified, having the following characteristics:

1. Heavy consumers who have increased the frequency of red meat use over time. This segment is not particularly significant numerically, but it has a fairly significant incidence on the global consumption of red meat, one which is also expanding over time (for simplicity we could call this group "heavy and on the rise");
2. Heavy consumers who are, however, reducing the intensity of red meat use ("heavy but in decline"); numerically important, this group has a considerable impact on global consumption, but it is also one in which the quantitative incidence is gradually diminishing;
3. Light consumers of red meat, who are moreover in a phase of further decline in their use of this product ("light and in decline"); this segment is entirely or almost entirely abandoning the use of red meat, unless some phenomena intervene that can turn this trend around;
4. Light consumers of red meat who, however, are in a phase of increased frequency of consumption ("light but on the rise"); this constitutes the segment that starts from a low level of faithfulness but is nonetheless undergoing a process of progressively approaching this product.

This method of segmentation will be used a number of times during the course of the analysis in order to examine in detail such aspects as purchasing motivations, quality expectations, the information requested, and so on.
We begin with an examination of the criteria of consumer choice at the moment of purchasing red meat. To facilitate the interpretation of the single values and related comparisons, all the original scales adopted regarding not only this aspect but also the subsequent ones (based on a succession of concepts) have been transformed into standardised quantitative scales, where the values range from a minimum of zero to a maximum of two. For example, the answer “not important” with reference to a choice factor is assigned the value of zero; the answer “important” is given the value of one; and the answer “very important” is given the value of two.
This system makes it possible for us to evaluate, for the four geographical areas separately and for Italy as a whole (total), the percentage of importance of the single factor of consumer choice.
For the consumers interviewed, the most important factors that influence the choice of beef were: safety (absence of residues, pathogens, not subject to BSE, etc.) with a score of 1.56, and the health and nutritional characteristics (1.27). These two elements are still very decisive for the survey area 2, north-east Italy.
Factors of moderate importance included satisfaction and enjoyment (1.10), the tradition of consumption (0.96), knowing how to cook meat (0.86), and the ease of cooking (0.8).
Viewed as elements of lesser importance, on the other hand, were the advertising or promotional message (0.11) and, more in general, the action of the media (0.42).
Greater sensitivity was shown towards the mass media, as well as towards price, by those we have defined as heavy but in decline, while above-average attention is given by the weak and in decline group towards the amount of service incorporated; i.e. that which can facilitate the use of the product in the kitchen.
The factor of tradition seems to regard both groups of heavy consumers independently of their consumption trends, in the same way as the type and evolution of the family situation are transversal for all those consumers who have increased the frequency of eating red meat.
Finally, there are various factors of choice given attention by the heavy and on the rise consumers (to a greater degree than the other segments): from the satisfactory flavour to the health and safety components, to knowledge of the methods for cooking beef.
As regards perceptions of the formation of the beef quality, the animal production phase is considered crucial, more so than that which takes place downstream.
Consumers give particular importance to animal diet and nutrition as an element of quality of the meat (1.67). Geographical origin is also seen by Italian consumers as a quality factor (1.46).
Respect for the environment and for the animals’ well-being are very highly considered (1.45 and 1.39, respectively), which confirms the increasing importance attributed to production factors in influencing the quality of the resulting food products.
Processing (1.57) and preservation (1.36) are quality factors indicated by consumers downstream from the primary production phase.
We also wanted to understand how consumers identify the quality of beef at the moment of purchase. Direct judgement; i.e. an evaluation of quality made by the purchaser him/herself, had the greatest level of importance (1.63). However, much is delegated to the recommendation of the seller, whether it is the local butcher or the supermarket, or to the labelling. It is also interesting to note that price is considered to be an indicator of quality.

In light of the upcoming application of labelling on beef throughout the European Union, we examined the consumers' expectations in this regard: specifically, which indications, according to the consumer, should be given on the label to qualify beef.
Freshness, interpreted as the indication of the "best before" date, is the main element that the consumer wants to find on the label (1.72), but consumers would also like to have indications on the path of traceability or quality control (1.57), of origin (1.50) and the production system (1.33).
Other quality indicators that could be included on the label include: nutritional information, maturation time, the name of the cut, and the name of the farm where the meat was produced.
If we situate Italian consumers on a scale according to the importance they attribute to the service incorporated, and thus to the level of quickness and practicality that can characterise the meat they might purchase, we see that those who are particularly attentive to the practicality factor want to find information on the label that is more concrete, such as the "best before" date, the name of the cut, and the nutritional profile of the product. On the opposite end, consumers who are not particularly concerned about looking for meat that is quick and easy to prepare, and who therefore purchase based on other criteria, would like to know different aspects such as the production system, the method of preservation and maturation of the meat, or also the producer's trademark.
An interesting position is held by information such as the traceability of the meat along the production-commercial filière which, in a certain sense, is requested across the board by consumers looking for service as well as by those who use other criteria and are therefore indifferent to the service component.
In the sphere of the segmentation constructed according to the frequency of beef consumption (heavy-light consumers) and to the quantitative evolution of red meat purchases which has taken place over the last few years, we note again how the traceability of the product is situated in a central position, and involves all four segments considered, as if it were a synthesis of a vast series of issues.
While in the weak and in decline segment it seems that there are no particular requests for information (a sort of confirmation of their disinterest towards the product in question), for the heavy but in decline group it seems that the trademark of the product to be purchased is particularly important; these consumers would tend to identify in meat a product similar to the majority of other foodstuffs which are characterised by more or less well-known brands.
The group we have called strong on the rise seems especially to require the name of the cut and (to a greater degree than the other groups) cooking suggestions, perhaps in search of ways of using the product that differ from the traditional methods. On the other hand, the segment which can be considered that of the new consumers (currently light users but in a phase of increase); i.e. the light on the rise, shows precise demands particularly in terms of the maturation time and clear "best before" dates.

3. RESULTS OF THE QUALITATIVE STEP

3.1 COMPLETE RESULTS OF THE FIRST FOCUS GROUP

Sample composed by 6 women coming from the North and 5 from the South and the Centre of Italy.
The participants have different ages: 5 between 40 and 60 and 6 between 28 and 33.

Purchase behaviour

The interviewed sample declares to buy and to consume more often, about twice a week, white meat (overall chicken, rabbit rarely). In this period, some of them worry about dioxin danger, and for this reason they are not eating chicken.
Use of red meat is limited to twice or three times a month for the half of presents. Two women declare to buy and to consume red meat more times during the week, nearly every day. Some people do not like too much red meat.
During the summer, red meat consumption decreases, it is used rarely. Frequency of consumption changes in families with children, it is higher.
Another woman says she buys meat whether when she does not know what to prepare or when she has little time, because it is easy and fast to cook.

Types and cut of meat

Most required cuts and types of meat are: steak, minced, fillet, chop, rump. The old participants prefer those cuts of meat used for boiled. Others love grilled chop.
One of the presents says: "I am able to eat just fillet, so it is better to buy chicken". Another woman affirms she has bought horsemeat recently, because it is leaner and healthier than other meat.
Some of them are not able to tell what body animal part corresponds to different cuts of meat.

Places where they buy meat

Focus participants buy meat at supermarket and hypermarket. There are different reasons explaining this behaviour: customers' houses next to sales points, the opportunity to buy packed meat, more hygienic and dusty protected, the possibility to buy meat making the course without making queue. Moreover at supermarket you are free to choose types, cuts and right prices. One of interviewed prefers buy meat at butcher's shop it has a good taste, better than meat bought at supermarket. According to her meat remains in the refrigerants for a long time. The other participants do not agree with her: in the supermarket sales are high so you can always find fresh product. Butchers' shops are disappearing in the North of Italy.

Uses outdoor

The sample is not used to have meat at restaurant apart from the case when it is cooked in particular way, difficult to be prepared at home or taking a lot of time (grill, balsamic vinegar fillet etc.).

Factors of interest

Most important aspects at the moment of purchase are freshness (packaging date is necessary), low price, colour (red intense, neither too light nor too dark), hand cuts and the appearance. Some participants give more attention to fat percent contained in the meat. They prefer leaner meat, even if fat presence gives more taste. A woman assumes that blood presence and red colour is a factor of freshness and tastiness. But according to some of them intense red colour comes from artificial substances. An important factor is the way of cutting meat, because it influences its toughness. The packaging must be upright.
The more appreciated aspects are strong taste, freshness, easily cooking, and consistency.
They do not like the flavour of stale meat, the strong smell and the fat.

The balance diet

In a balance diet we could have red meat almost once a week, (two women assume twice a week). In many cases, meat use is more reduced in consequence of unpleasant taste and negative effects on health. According to the participants white meat is less dangerous for health than red meat, in particular for old people.
According to one-person meat proteins are not replaceable by other foods. She disapproves vegetarian diet. On the contrary the others think meat can be substituted by different aliments. One of them adds: "Red meat is good for our health but it is not primary in my diet". Another one assumes: "I try to eat read meat because I think it is good for health and contains primary proteins as white meat".

Packaging

The participants prefer normal packaging instead of vacuum or modified atmosphere packed, in fact they exclusivity buy normal packaging with absorbing blood sponge. Packing is synonym of hygienic. According one of them polystyrene packaging gives a bad taste, not natural. Somebody prefers little packing, but it is possible to ask for personalised one. In the butcher's shop you can find meat in opened exposers, besides butcher cuts meat and then touch money, it is not hygienic. In the supermarket the salesman do not touch money but only meat. Many presents have never seen modified atmosphere packed, for this reason they are not able to distinguish normal packed from modified atmosphere packed. Instead they are able to acknowledge vacuum meat, disagreeable to see.
Vacuum packed is associated to foreign products. One of the presents has seen meat sold in this way and it appeared very dark.

Hygienic/health measures

The sample believes hygienic/health guarantees are provided by public veterinary surgeon, that is by Public Health Service. Supermarket are obliged to check public certificates, some of presents think distributors can give a good guarantee. If the control were effectuated by more than one person it would be better. The participants give their confidence to public check; even if according one-person veterinary surgeons cannot to control all meat. They do not trust in a total guarantee, even if they think it is not necessary to worry too much. Somebody says: "I prefer to not think about dangers otherwise I would not eat". One of them gives confidence to butchers but another one relies on lack of certificate in butchers' shop. The present consumers suppose toxic substances adulterate meat more than other aliments (less toxic). The majority of interviewed believes white meat is better for health than red one, but they are not sure about that. According to one of them you can have adulterated meat in big cities, and natural meat in small cities. They lay stress on hormones, dioxin, mad cow, and afta. They do not know what exactly afta is. Participants worry more about BSE virus (from mad cow) instead of estrogenic and dioxin risk. They do not feel sure about meat quality because of many scandals.
To obtain more guarantees people would pay 5-7% more (about £ 1000/2000 up).

Product information

Product information and its origin are considered very important. The sample will pay a higher price, about 5-7% more to obtain more product information, origin, slaughterhouse and nutritional facts. Sample remembers there are some information on the meat packaging: date, distributor, brand, and single price. They give mainly attention to the date of packaging to buy the freshest meat and give attention to the brochure containing meat information. Sample considers useful to know the origin and the nutritional facts (fat, calories, etc.). You can know manufacture's name only for prepared meat, that do not contains only meat.
This information could give more safety to consumers. A woman says:" a company giving more information could have competitive advantage on the market.

Brands

Some transformed meat brands are well known: Aia, Amadori, and Montorsi. These brands are advertised on television and magazine. The sample has never seen any fresh meat advertising, in fact remembers can meat and homogenised foods advertising.
Only two among the presents indicate Integra brand (fresh meat), they remember the advertisement on TV, on magazines. Even if they know Integra brand they have never bought that product.

Elaborated and transformed meat

During the focus an example of transformed and elaborated meat is shown. It has a bad aspect and the sample dislikes that. It looks like chewed, but the packaging makes a good impression. According to some of them the product has been packaged in modified atmosphere. Only one of them would buy this kind of items, because pre-cooked foods are easier and faster to be prepared and they are good for single. She gives confidence to manufacture products instead of butcher's products. Another woman affirms to give more confidence to butchers and little producers than big one. The others would not buy preserved meat for two months. They prefer buying fresh meat and freezing it. To cook meat is fast, you can buy elaborated meat just for receipt that taking a lot of time.

Buying meat depends on their origin

Meat coming from Argentina is very appreciated by two women, but it is difficult to find it. Grazing meat (especially from Toscana and Trentino) is preferred. It is very tasty, but sometimes it is tough and filamentous. Meat coming from animals living in cowshed has less taste and it is tender. Sometimes tough meat is indigestible.

Biological meat

The sample is not sure about biological meat existence and its characteristics: may be it is a kind of meat without preservatives. They do not rely on biological products. In their opinion those products are expensive and not so genuine. For these reasons and for lack of time they have never looked for it. To find wholesome food is difficult. Meat from animals that has grown in fields, without eating adulterated aliments, is better, more genuine than biological one.

Forecast

The sample forecast the stability or the decrease of red meat consumption, seeing that it is unhealthy, especially for old people. Families with children buy meat more often, because meat is good for them. Red meat consumption is threatened by substitutive aliments, in particular by fish.

Ideas to stimulate meat consumption

Their proposals to increase meat consumption are various, the most interesting ones: to sell meat with vegetables (f. e. hamburger and spinach); to create a place where it is possible to buy raw meat, to choose the way of cooking and to have meat cooked; to give new receipts on boxes; finally to institute free number for information. Finally increasing of advertising could push meat sell. In their opinion new proposals may increase sells. Somebody has proposed to sell meat snack, but the majority is sceptic because in Italy it is difficult to launch new products, so different from Italian habits.

3.2 FIRST FOCUS GROUP - LIST OF THE MAIN RESULTS

- In many cases, meat use is more reduced in consequence of unpleasant taste and negative effects on health. According to the participants white meat is less dangerous for health than red meat.

- The sample is not used to have meat at restaurant apart from the case when it is cooked in particular way, difficult to be prepared at home or taking a lot of time.

- Focus participants buy meat at supermarket and hypermarket. There are different reasons explaining this behaviour: the opportunity to buy packed meat, more hygienic and dusty protected, the possibility to buy meat making the course without making queue.
- Moreover at supermarket you are free to choose types, cuts and right prices.
- In the butcher's shop you can find meat in opened exposers, besides butcher cuts meat and then touch money, it is not hygienic.

- Most important aspects at the moment of purchase are freshness, low price, colour, hand cuts and the appearance.
- Some participants give more attention to fat percent contained in the meat; they prefer leaner meat, even if fat presence gives more taste.
- An important factor is the way of cutting meat, because it influences its toughness.
- The participants prefer normal packaging instead of vacuum or modified atmosphere packed. Vacuum packed is associated to foreign products.
- At the moment of consumption, the more appreciated aspects are strong taste, freshness, easily cooking, and consistency. The participants do not like the flavour of stale meat, the strong smell and the fat.

- The sample believes hygienic/health guarantees are provided by public veterinary surgeon, that is by Public Health Service. However, if the control were effectuated by more than one person, it would be better.
- The participants give their confidence to public check; even if according one-person veterinary surgeons cannot to control all meat.
- They do not trust in a total guarantee, even if they think it is not necessary to worry too much.
- The consumers suppose toxic substances adulterate meat more than other aliments
- Participants worry more about BSE virus instead of estrogenic and dioxin risk. They do not feel sure about meat quality because of many scandals. To obtain more guarantees people would pay 5-7% more (about £ 1000/2000 up).

- Product information and its origin are considered very important. The sample will pay a higher price, about 5-7% more to obtain more product information, origin, slaughterhouse and nutritional facts.
- The sample has never seen any fresh meat advertising, in fact remembers can meat and homogenised foods advertising.

- The people interviewed do not rely on biological meat. In their opinion this product is expensive and not so genuine.

- The sample forecast the stability or the decrease of red meat consumption, seeing that it is unhealthy, especially for old people.
- Red meat consumption is threatened by substitutive aliments, in particular by fish.

- The proposals to increase meat consumption are various, the most interesting ones:
  - to sell meat with vegetables;
  - to create a place where it is possible to buy raw meat;
  - to choose the way of cooking and to have meat cooked;

- ✧ to give new receipts on boxes;
- ✧ to institute free number for information;
- ✧ finally, increasing of advertising could push meat sell.

3.3 COMPLETE RESULTS OF THE IN-DEPTH INTERVIEWS CONDUCTED WITH CONSUMERS DURING THE MONTHS OF JANUARY-FEBRUARY 2001

The fourteen interviews were conducted during a period in which the issue of “mad cow disease” was on the front pages of newspapers and among the top news stories on television. This inevitably conditioned the responses of the interviewees, who were highly involved with this problem on both the rational and the emotional levels.
The consumers interviewed appeared to be very worried, particularly due to the diversity of opinions they were hearing and the ups and downs of information, which seemed to create a lack of credibility also as regards messages of reassurance.
In fact, one young woman in charge of the food shopping for her family stated: “It’s easier and more spontaneous to believe that the news is true rather than trying to find out more or verify it for yourself.”

Reactions to the BSE problem
For many of the interviewees, the news about BSE had an impact on the entire meat sector. “The problem is that I no longer trust meat in general,” a number of consumers stated.
In effect, what clearly emerged is that beef is traditionally the most important and the most emotionally involving meat in the sector. It is not by chance that the interviewees often used the generic word “meat” (“carne” in Italian) when speaking about beef (carne bovina). Instead, when they mentioned another type of meat, they would use the full name: “carne di maiale” (pork), “carne di cavallo” (horse meat), and so on.
Consequently, as already mentioned, a scandal regarding beef negatively affects meat in general, for some consumers also at the level of purchasing behaviour and consumption: “Just to be on the safe side, I stopped eating all meat.” For others, the effects were only at the level of perceived image: “I have increased the use of other meats because is necessary for the human diet, but I’m not at all sure that these other kinds of meat are free of health risks.”
It is important to consider the fact that for many years, apart from the scandals that have appeared in the mass media, red meat has had a downward trend and is, in part, considered to be “out-of-date” (at the image level) with respect to grains and vegetables in the experience of many consumers. In the in-depth interviews, when the interviewees were asked to give a profile of the heavy purchaser and/or consumer of red meat, characteristics sometimes emerged that were not particularly positive, such as a person who is antiquated, old-fashioned, isolated, who is not in contact with the world and who does not read the newspapers.
Another important indication lies in the fact that, for a number of consumers, scandals such as mad cow disease do not generate such a heavy impact on the processed product as on non-processed products. It seems that in situations in which the consumer is not actually face to face with the beef, or is not alone in reflecting on the product that he or she is eating, the effect caused by the scandals is somewhat weakened. Two statements made by interviewees in this regard serve as examples: “I stopped eating beef directly, but

in ragu sauce, mixed with pasta, I continue to eat it and I'm not too worried about this"; "In a restaurant it's different, you're in the company of others and you don't think about it."

Nutritional power

Many of the interviewees were particularly concerned about those persons who most need the nutritional contributions of red meat: first and foremost growing children and youth.
In fact, there emerged a contrast between the healthful image of beef, which is currently being strongly debated, and the nutritional perception of this type of meat; that is, beef is the meat now perceived to be the most at risk, but it is also the one with the greatest capacity to supply energy and the highest nutritional power.
This nutritional power at times appeared to be seen as excessive, at least for adult consumers: the heavy user of beef was identified by various interviewees as a person of above-average weight, in certain cases aggressive.
For growing children, the substitution made by some interviewees went in the direction of pork (which, however, holds a worse position as regards cholesterol, quite distant from other meats), or else horse meat. Some are planning to add new meats to their dietary range, or at least to try them; for example ostrich, which is now being promoted by a number of sales points.

The willingness to sustain higher costs

With respect to the health-related problems, price seems to pass decidedly into second place: "Normally I'm very attentive to the price, and I would buy meat more often if it cost less; in this moment, I've almost forgotten about the cost and I would buy more only if I could be sure it was not a health risk."
In reality, the price issue should not be underestimated or, in any case, it is not so secondary as it might appear on superficial analysis. In fact, the price factor emerged frequently in response to indirect questions based on projection, while it was rarely cited as a constraint to purchasing in the answers the interviewees gave to direct questions.
In relation to the BSE problem, many interviewees explicitly stated their willingness to spend more in order to have safe meat. In reality, we feel that we can identify three groups of consumers based on actual types of behaviour:

1. consumers who are convinced of their willingness to spend more but who, on a more concrete day-to-day basis, would sooner or later be affected by restraint, doubts, or rethinking;
2. consumers who are currently not particularly attentive to price but whose sensitivity to this factor could increase in correspondence with increases in the price itself;
3. consumers who are more oriented towards considering the overall price/quality relationship rather than merely the price factor. Among the interviewees, some purchasers of organic meat, or in any case high quality meat, stated that they were convinced that the sales price of beef is right and not excessively high, despite the fact that in the majority of cases they sustain higher purchasing costs.

The concept of quality meat

Apart from the responses regarding price, when the interviewees were asked about their willingness to spend more for high quality meat, it was evident that their expectations in terms of the concept of quality meat differ widely. Given the period in which the in-depth interviews were carried out, this concept was initially considered at the emotional level, and simplified to "as long as it's free of the mad cow problem." However, going into more depth, it could be seen that what the consumer expects from the hypothetical high quality meat is the resolution of all the problems related to beef, which are now considered to be serious. Quality meat, in fact, is seen as more healthful, better tasting, and at the same

time leaner and more tender. Quality meat is attributed characteristics such as greater yield, higher nutritional capacity, better aesthetics and other benefits of various types.
As regards quality and healthfulness, the interview results showed that in daily purchasing behaviour, the consumer is not likely to think about the difference between these two concepts as attributes of the meat: as the norm, they coincide.

Nostalgia for the past
At the emotional level, the quality product is connected in the consumer's imagination to a return to the lifestyles of other times and the respective values of life that seem to have got lost.
Particularly for the most traditional consumers, the scandals they hear about in the mass media bring out a sense of nostalgia for the past.
During the interviews, symbolic aspects often emerged connected to this kind of nostalgia and a desire to rediscover nature, to the simplicity of rural culture and to more calm and relaxing lifestyles. In the end, the problems with beef are nothing more than the result of social and individual distancing from nature, and contact with nature has been weakened by modern living conditions, defined by some as “unnatural.”
From this perspective we could also interpret the preference for small farmers (about which, however, the opinions gathered were not all the same), perceived as a person who is less attentive to profit and oriented towards more traditional farm management based on love and care.

Attention to the environment
Along with the absence of substances perceived as extraneous to the product's own characteristics, and particularly the absence of forced methods of animal raising, a number of interviewees also associated the benefits of environmental protection and the recovery of the normal context of nature.
Some of them seem to have the impression that by consuming quality products they are contributing to the resolution of environmental problems. However, the majority of consumers interviewed, though not denying this aspect on the rational level, demonstrated a rather tepid attitude towards environmental problems compared to the impact that situations such as that of BSE have on the question of safety related to personal health.

Dissonance
As regards the risks to personal health, a rather interesting dynamic seems to have developed; that is, despite the fact that many do not believe the hypothesis that Italy is a sort of “happy island”, barely or not at all contaminated by the problem that is spreading in Europe, in general there emerges a certain awareness that beef is controlled by the public authorities more now than ever before. However, this awareness was expressed only after certain reflections stimulated by the interviewer.
At the emotional level, everything that is said about BSE, even including messages that are theoretically reassuring, brings to mind the problem and thus the remote possibility that health risks really do exist.
Consequently, a number of consumers admitted that they are turning to other products precisely in order to avoid this effect.
This behaviour seems to belong to the well-known phenomenon of dissonance, where a message, even though it is positive, evokes or recalls a sensation of fear, and thus itself becomes a source of fears, so that the rational content of the message itself is contrasted.
It was noted how some consumers interviewed prefer to forget the mad cow problem, avoiding exposure to any message and, for example, choosing other types of foods.

Factors of guarantee

In the mind of some of the consumers interviewed, there is no way to be absolutely sure when one purchases beef: "Is the presence of BSE visible in the phases subsequent to slaughtering? Are the controls carried out in the shop or on the distribution chain really effective for identifying the presence of BSE?"

The problem is aggravated by the fact that the distinction between safe meat and risky meat is entirely outside the visual capacity of the consumer: "I cannot find a relationship between the appearance, the price, and healthiness."

For other consumers, it can be crucial to know that the butcher knows the precise provenance of the meat he sells: "I'm not interested in the producer's name if no one can guarantee it to me." "The possibility to know the name of the farm is a guarantee only in the presence of someone I trust; this person has to assure me that he has a sort of identity card and that he has the possibility, in case of necessity, to trace the meat to the farm and the techniques of raising and slaughtering used."

One type of information that has more recently been given increasing importance by consumers is the name of the cut, from the name of the part of the animal. From this information many consumers deduce a sort of entity of possible risk.

Many consumers are also paying more attention than in the past to the animal production system and, specifically, to what the animals have been fed: "The controls should focus on the diet of the animals."

When the interviewer introduced the issue of farm brand marks, all the interviewees stated that they had never seen these on beef, differently from that which occurs with other meats. With the growing demand for reassurance, the producer's brand mark could represent an assumption of responsibility and a source of recognisability for the consumer.

The role of the sales point

In the majority of cases, the interviewers spontaneously spoke about their actual and desired type of sales point for purchasing beef.

For some, the trust placed in the local butcher is important, even though "the maximum trust in this person doesn't give complete certainty, though we continue to believe he acts in good faith; there are certain aspects that may be beyond his control."

In general, however, the trusted butcher is viewed almost as a friend, who probably in turn has his own trusted suppliers.

Other factors that lead the consumer to purchase meat at the butcher's shop include the possibility to ask for recommendations and, for some consumers, the perceived higher level of meat naturalness and freshness. In various cases, therefore, the image was that the local butcher is closer to the source and to the countryside.

As regards the modern supermarket chains, consumer trust resulted slightly lesser, though certainly higher than in the past; some interviewees affirmed that it is difficult to control such high volumes of activity effectively. The most modern consumers, on the other hand, imagined strict selection and in-depth laboratory controls on the product before it is placed on supermarket counters, in addition to certification by the health authorities.

At the emotional level, it is likely that in a delicate moment such as the one in which the interviews were carried out, in a certain sense particular importance is attributed to butcher in his role as guarantor, who can maintain a personal relationship with his customers. The level of trust placed in large-scale distribution, on the other hand, (though still within the emotional sphere) is characterised by a certain degree of anonymity.

3.4 IN-DEPTH INTERVIEWS CONDUCTED WITH CONSUMERS DURING THE MONTHS OF JANUARY-FEBRUARY 2001 - LIST OF THE MAIN RESULTS

- Reactions to the BSE problem
  - The consumers interviewed appeared to be very worried, particularly due to the diversity of opinions they were hearing and the ups and downs of information on "mad cow disease", which seem to create a lack of credibility.
  - For many of the interviewees, the news about BSE have an impact on the entire meat sector: for some consumers also at the level of purchasing behaviour and consumption, while for others the effects are only at the level of perceived image.
  - In situations in which the consumer is not actually face to face with the beef (in ragu sauce, mixed with pasta) or is not alone in reflecting on the product that he or she is eating (in a restaurant), the effect caused by the scandals is somewhat weakened.
  - Particularly for the most traditional consumers, the scandals they hear about in the mass media bring out a sense of nostalgia for the past.
  - Some consumers seem to have the impression that by consuming quality products they are contributing to the resolution of environmental problems. However, the majority of consumers interviewed, though not denying this aspect on the rational level, demonstrated a rather tepid attitude towards environmental problems compared to the impact that BSE have on the question of safety related to personal health.

- Nutritional power
  - Many of the interviewees spoke about a contrast between the healthful image of beef, which is currently being strongly debated, and the nutritional perception of this type of meat: beef is the meat now perceived to be the most at risk, but it is also the one with the greatest capacity to supply the highest nutritional power.
  - For growing children, the substitution made by some interviewees went in the direction of pork or else horse meat.

- The concept of quality meat
  - As regards quality and healthfulness, the interview results showed that in daily purchasing behaviour, the consumer is not likely to think about the difference between these two concepts as attributes of the meat: as the norm, they coincide.

- Dissonance
  - In general there emerged a certain awareness that beef is controlled by the public authorities more now than ever before. However, this awareness was expressed only after certain reflections stimulated by the interviewer.
  - At the emotional level, everything that is said about BSE, even including messages that are theoretically reassuring, brings to mind the problem.
  - Consequently, a number of consumers admitted that they are turning to other products precisely in order to avoid this effect.

- The willingness to sustain higher costs
  - With respect to the health-related problems, price seems to pass decidedly into second place.
  - In reality, the price issue is not so secondary as it might appear. In fact, the price factor emerged frequently in response to indirect questions based on projection.

- Many interviewees explicitly stated their willingness to spend more in order to have safe meat. In reality, we can identify three groups of consumers:
  1. consumers who are convinced of their willingness to spend more but who, on a more concrete day-to-day basis, would sooner or later be affected by restraint, doubts, or rethinking;
  2. consumers who are currently not particularly attentive to price but whose sensitivity to this factor could increase in correspondence with increases in the price itself;
  3. consumers who are more oriented towards considering the overall price/quality relationship rather than merely the price factor.

- Factors of guarantee
  - In the mind of some consumers, there is no way to be absolutely sure when one purchases beef. The problem is aggravated by the fact that the distinction between safe meat and risky meat is entirely outside the visual capacity of the consumer.
  - For other consumers, it can be crucial to know that the butcher knows the precise provenance of the meat he sells. "The possibility to know the name of the farm is a guarantee only in the presence of someone I trust; this person has to assure me that he has the possibility to trace the meat to the farm and the techniques of raising and slaughtering used."
  - One type of information that has more recently been given increasing importance by consumers is the name of the cut. Many consumers are also paying more attention than in the past to the animal production system and, specifically, to what the animals have been fed.

- <u>The role of the sales point</u>
  - For many consumers, the trust placed in the local butcher is important. The trusted butcher is viewed almost as a friend, who probably in turn has his own trusted suppliers.
  - As regards the modern supermarket chains, consumer trust resulted slightly lesser, though certainly higher than in the past; some interviewees affirmed that it is difficult to control such high volumes of activity effectively. The most modern consumers, on the other hand, imagined strict selection and in-depth laboratory controls.
  - At the emotional level, particular importance is attributed to butcher in his role as guarantor, who can maintain a personal relationship with his customers. The level of trust placed in large-scale distribution, on the other hand, (though still within the emotional sphere) is characterised by a certain degree of anonymity.

4. CONCLUSIONS

Over the last 15-20 years, various evolutionary factors have contributed to a negative trend in beef consumption.
The cyclone of the Mediterranean diet, for instance, has clouded the red meat market and favoured the consumption of vegetables, fruit, olive oil, and cereal grains.
In addition, in its role as the central dish of the traditional meal (especially as regards lunch), beef cannot help but feel the negative effects of the destructuring of meals into small and faster moments of consumption.
A clear demarcation has thus been created between the two main moments of eating:

- on one hand, the more convivial moment, where red meat has an important place;
- on the other hand, the hurried daily meal in which red meat is included only in certain ways, with consequent effects of monotony.

For the businesses in the sector, it has become essential to segment the market more carefully and enter with specific products for the single segments identified.
For example, consumers who are particularly attentive to the practicality factor want to find information on the label that is more concrete, such as the "best before" date, the name of the cut, and the nutritional profile of the product. On the opposite end, consumers who are not particularly concerned about looking for meat that is quick and easy to prepare, would like to know different aspects such as the production system, the method of preservation and maturation of the meat, or also the producer's trademark.
Among consumers, greater sensitivity is shown towards the mass media, as well as towards price, by those we have defined as "heavy but in decline" consumers of beef, while above-average attention is given by the "weak and in decline" group towards the amount of service incorporated.
There could be many criteria of market segmentation; some of these have been identified in this study, while others require a more specific and in-depth analysis.

Incorporated service
For the occasions of use in which the consumer is attentive to the "shadow-price"; that is, the costs connected to purchase time, preparation time, and so on, there is a need to incorporate service in the sale of the product.
Moving from a commodity attitude to a concept of convenience makes it possible to apply more well-aimed strategies of differentiation and to overcome the constraint of price based on quantity.
The crucial point is to find the right balance, for each consumer target, between the appreciation of a significant level of incorporated service and the parallel negative experience of any distancing from the original presentation of the product.
Equally important is the further step of consumer research aimed at understanding consumers' reactions to different concepts of innovative products.
From the research carried out, it emerged that in situations in which the consumer is not actually face to face with the beef, the effect caused by the scandals is somewhat weakened. Therefore, strategies of innovation should consider the possibility of offering beef as an ingredient in recipe products (for example, meat with vegetables).

New methods of use
In light of the profound changes in eating styles, it would be opportune to stimulate new opportunities for beef consumption, educating consumers regarding alternative models of use.

A number of ideas that emerged from our interviews would deserve to be analysed in greater depth; for example, the creation of places where it is possible to buy raw meat, or to choose the way of cooking and to have meat cooked in this way.

Traceability

On the basis of the results of the research, the most important factors that influence the choice of beef are safety (absence of residues, pathogens, not subject to BSE, etc.), and the health and nutritional characteristics.

The traceability of the meat along the production-commercial filière is requested across the board by consumers looking for service as well as by those who use other criteria and are therefore indifferent to the service component.

The traceability of the product is also situated in a central position in terms of the frequency of beef consumption (heavy-light consumers) and to the quantitative evolution of consumption, as if it were a synthesis of a vast series of issues.

In general, consumers consider that the current visibility of health guarantees is inadequate; therefore, one of the roles to be developed and carefully analysed, for both the public and private sectors, will be that of assuring the final user of the product’s quality and health-related safety.

From this point of view, it could be considered that the possibility to know the producer’s name is a guarantee only in the presence of someone the consumer trusts, someone who is able to trace the meat to the farm and knows the techniques of raising and slaughtering used.

As regards quality and healthfulness, the interview results showed that in daily purchasing behaviour, the consumer is not likely to think about the difference between these two concepts as attributes of the meat: as the norm, they coincide. A careful strategy of communication to the consumer will have to start from this point.

Quality labels

In the context of traceability and consumer reassurance, the presence of labels on the meat, regarding origin and/or quality as well as the producer’s name, represents an assumption of responsibility and gives consumers the possibility to have a clear point of reference.

An attentive policy of label management and control should be studied in detail, clearly defining the values expressed by the label, the quality standards and production specifications. The concrete methods of handling the label must be set forth in detail, including regulations, technical commissions, certifying bodies, and so on.

Price

On the basis of the results of the research, people are generally willing to pay a higher price in order to have greater guarantees.

The price issue is thus not as secondary as it might appear, and it requires a more in-depth step of research. In fact, the price factor emerged frequently in response to indirect questions based on projection.

We can identify a number of groups based on consumer behaviour towards price; for example:

- consumers who are convinced of their willingness to spend more but who, on a more concrete day-to-day basis, would sooner or later be affected by doubts and rethinking;
- consumers who are currently not particularly attentive to price but whose sensitivity could increase in correspondence with increases in the price itself;
- consumers who are more oriented towards considering the overall price/quality relationship rather than merely the price factor.

Crisis management
In recent years, and above all in the few last months, the BSE scandals have had a decisive role in consumer behaviour. Consumers are currently extremely suspicious and diffident toward the meat they purchase.
At the emotional level, everything that is said about BSE, even including some types of messages that are theoretically reassuring, brings to mind the problem.
It is very important to identify messages that are able to provide reassurance, while at the same time avoiding the rebounding effects in the face of negative news. This could take place, for example, through initiatives aimed at sensitising those who "set the trends"; i.e. the opinion leaders.
It could be opportune to institute a crisis management unit at the public level that is able to intervene rapidly in the most critical moments, concurrently with the onset of unexpected problems such as that of BSE. The role, the operation, and the mechanisms for spreading the effects of the crisis management unit should be carefully studied and tested in every detail, as there are potentially many operative instruments (the establishment of a toll-free number, a programme of television editorials, and so on).