

# Literature review WP 4

## Switzerland

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## Review report

### 1. CONSUMER SURVEY - MAIN RESULTS

#### 1.1. Buying factors

September/October 1998

1269 interviewed persons

Survey for the Institute for Agricultural Economics (EPFZ) by IHA.GfM (Survey for the Project FAIR-CT 95-306 Ç PDO-PGI Products : Market, Supply Chain and Institutions")

Aim of the survey: to know the most important buying factors of the Swiss consumers before asking them a few questions about the Gruyere cheese

#### What are the most important factors when buying a food product?

Appearance of the product	39.5%
Brand or name of manufacture/supplier	17.8%
Confidence in the outlet	23.1%
Official quality label	12.6%
Indication of origin/ country of origin	19.7%
Price not too high	17.5%

The buying factors differ according to the product

The appearance is the most important buying factor for the cheese, the potatoes, the ham and the fruit (not the olive oil)

The brand is the most important buying factor for the olive oil

The confidence in the outlet is the most important buying factor for fresh lamb

The brand is a buying factor for at least a fifth of the consumer when speaking about cheese and olive oil (not about the other products)

The origin is a buying factor for at least a fifth of the consumer when speaking about cheese and olive oil and fruit (not about the other products)

The German speaking consumers tend to trust more than the French speaking ones the outlet where they buy their product.

They also tend to be more sensitive to an indication of origin but less sensitive to the price than the French speaking ones.

The consumers living in larger cities are more sensitive to a brand than the consumers living in small towns or villages.

#### 1.2. AOC (PDO) and PGI

January 2001

704 interviewed persons

Survey for the Swiss Association for the promotion of the PDO and PGI labels

Aim of the survey: to know how much the PDO (AOC) and the PGI labels are known in Switzerland one year after the registration of the first Swiss PDO product

#### Have the Swiss consumers heard about the PDO or protected designation of origin (AOC or *appellation d'origine contrôlée* in French)?

70,3% of the interviewed people say they have heard about the *AOC* or *Appellation d'origine contrôlée*, (86,1% in the French speaking part and 56,6% in the German speaking part)

**More than two thirds of the people say they have heard about the AOC**

#### Do the people who say they have heard about the AOC know what it is ?

In the French speaking part, 80% of these people can explain what is an AOC (they know some categories of products which can have an AOC and they know some guarantees given by this label)

**The PDO is a label which is known by 70% of the French Speaking consumers in Switzerland.**

In the German speaking part, not even half of the people who say they have heard about an AOC knows what it is

**The AOC is a label which is known by 30% of the German Speaking consumers.**

**The AOC is a label much more wellknown in the French Speaking part than in the German one**

**To which products is the AOC label associated ?**

The AOC label is first of all associated to the wine and then to the fresh meat<sup>i</sup> and to the cheese.

**What means an AOC ?**

For the people who have heard about the AOC, it is first of all a Quality Label and then something to do with a given origin

**Importance of the idea of quality and of the origin**

**Have the Swiss consumers heard about the PGI or protected geographical indication (IGP or indication géographique protégée in French)?**

11,7% of the interviewed people say they heard about *IGP* or *Indication géographique protégée*

**Only one tenth of the people have heard about PGI**

### 1.3. Labels and PGI

November 2000

504 interviewed persons in the French Speaking part of Switzerland

Survey for the Consumers Federation in the French Speaking part of Switzerland (FRC)

Aim of the survey: to know what consumers are expecting with a "*produit du terroir*" and a PGI

**How important is the know-how the origin of the raw material for a *produit du terroir*?**

	Know-how	Origin of the raw material
Very important:	76.6%	85.1%
Quite important:	19.2%	10.1%
Not so important	2%	2.8%
Not important at all	0,2%	0.4%

**The know-how and the origin of the raw material for a *produit du terroir* are important for nearly all the interviewed persons**

**The origin of the raw material is even more important than the know-how**

**Where from should come the raw material for a "*Meringue de la Gruyère*"<sup>ii</sup>?**

>From the Gruyère area	45.2%	
From the canton <sup>iii</sup> of Fribourg <sup>iv</sup>		22.4%
From anywhere in Switzerland	24.8%	
>From anywhere in the world	5.2%	

**Nearly half of the interviewed people think that the raw material should come from the area which gives its name to the product**

<sup>i</sup> There is no fresh meat with an AOC !

<sup>ii</sup> A *Meringue de la Gruyère* is a speciality (a meringue) of the Gruyere area. It is usually eaten with thick cream (not whipped one)

<sup>iii</sup> Switzerland is divided into 23 cantons which are a kind of provinces.

<sup>iv</sup> Gruyère is in the canton of Fribourg

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**Have you heard about the PGI (IGP in French)?**

Yes	17.3%
No	82.7%

**The PGI label is still poorly known in Switzerland**

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**Where from should come the raw material for the Grisons dried meat (Bündnerfleisch)<sup>v</sup>?**

From the Grisons	61.9%
From Switzerland	30.2%
From anywhere in the world	6.5%

**The meat for the Bündnerfleisch should be at least Swiss and it should even come from the Grisons area for nearly two thirds of the consumers**

### 1.3. Perception of the swiss quality and importance of the origin for swiss consumers

March 1998

512 interviewed persons

Survey for Agro Marketing Switzerland

Aim of the survey : Evaluation of how pertinent and discerning it is to create a Swiss Quality Label for food products

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**What do you think about the fact that we import food products which grow in our country?**

Find it very strange <sup>vi</sup> :	49%
Find it strange:	32%
It is quite normal:	15%
It is completely normal:	4%

Difference between the German speaking part and the French speaking part

*The German speaking consumers find this possibility even stranger than the French ones*

Difference between men and women : None<sup>vii</sup>

**For more than 80% of the Swiss consumers it is a matter of concern that we can import food products which grow in Switzerland**

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**Do you think that Swiss products have a higher quality than other products?**

Better quality:	33%
Same quality:	66%
Worse quality:	---

Difference between the German speaking part and the French speaking part : None

Difference between men and women: None

**One third of the Swiss consumers think that Swiss products have a higher quality than others products**

Reasons of this feeling:

1. Better controls (43%)
2. Stronger laws (30%)
3. "Conscientious production" (15%)
4. Freshness (12%)
5. Stronger trust in Switzerland (12%)
6. Good raw material/ good soil (10%)

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<sup>v</sup> The Bündnerfleisch is a speciality (dried beef meat) produced in the Grisons canton. It was the first product to be registered as a PGI in September 2000. The meat mostly comes from Argentina as the Swiss law do not require Swiss raw material for PGI.

<sup>vi</sup> Strange means here that the situation is a matter of concern for the interviewed person

<sup>vii</sup> None here Ç no significant difference.

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### How important is it to know the origin of the food products?

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Very important:	35%
Important:	28%
Quite important:	25%
Not very important:	7%
Not important:	5%

Difference between the German speaking part and the French speaking part  
*Knowing the origin of a product is even more important for the German consumers*

Difference between men and women : None

**Only one tenth of the consumers do not care about the origin of the food products.**

### Importance of a Swiss origin for food products

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A Swiss origin for a food product is in general quite important (4 points in average on a 5 point scale) for Swiss consumers.

Difference between the German speaking part and the French speaking part  
*A Swiss origin is even more important for Swiss German people*

Difference between men and women

*Women seem to care slightly more about a Swiss origin for a product than men.*

This importance changes according to the product

Milk	4.39
Chocolate	4.29
Fresh meat	4.23
Fresh milk product (yoghurt)	4.16
Chicken	4.08
Frozen meat	3.86
Potatoes	3.80
Vegetables	3.85
Hard and semi-hard cheeses	3.81
Mineral water	3.61
Fruits	3.77
Soft cheeses	3.33
Canned food	3.33
Pasta	3.09

**A Swiss origin for a food product is important for Swiss consumers, and even very important for milk, chocolate and meat!**

### Do you agree with the assessment that you buy products produced and processed in Switzerland because Swiss requirements for food products and production are stronger in Switzerland than in EU-countries?

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I do fully agree	38%
I quite agree	44%
I do not quite agree	14%
I do not agree	4%

Difference between the German speaking part and the French speaking part: None

Difference between men and women : None

**The fact that Swiss requirements for food products and production is thought to be higher than European ones is an argument to buy food products for more than three quarters of the Swiss consumers**

### What do you think of the way the origin of a product is now indicated on food products?

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Very good	10%
Good	47%
OK	33%
Not so good	8%
Bad	1%

Difference between the German speaking part and the French speaking part: None  
 Difference between men and women : None

**Swiss consumers are usually quite satisfied about the way origins indicated on food products. It is not good for only one tenth of the people**

**Do you take into consideration the fact that the food products comes from Switzerland when buying food products?**

Yes very much	26%
Rather yes	46%
Not really	23%
Not at all	5%

Difference between the German speaking part and the French speaking part  
*Stronger consideration for a Swiss origin on the German side*

Difference between men and women  
*Women seem more attentive to a Swiss origin than men*

**A Swiss origin is a buying criteria on for nearly three quarters of the Swiss consumers and even very important for one third of them**

**What requirements should fulfil a Quality Label for agricultural products?**

1. Environmentally friendly or organic production (34%)
2. High quality (31%)
3. Swiss production or product (29% but 30% on the German side and only 23% on the French one)
4. A method of production which is respectful for animals (19%)
5. Controls, respected requirements (14%)
6. Freshness (12%)

**A Quality label should be associated with a Swiss production for more than one quarter of the Swiss consumers**

**In which proportion should the raw material come from Switzerland for a product with a Quality Label?**

100% of raw material from Switzerland	56%
80% of raw material from Switzerland	32%
At least 50% of raw material from Switzerland	9%
Less than 50%	1%

Difference between the German speaking part and the French speaking part  
*More French Speaking consumers would like the raw material to be 100% Swiss*

Difference between men and women : None

**More than half of the consumers think that the raw material should be 100% Swiss for a product with a Quality Label.**

**In which proportion should the production take place in Switzerland for a product with a Quality Label?**

Completely in Switzerland	81%
Partly in Switzerland	17%
Completely abroad	1%

Difference between the German speaking part and the French speaking part : None  
 Difference between men and women : None

**Three quarters of the Swiss people think that a product with a Quality Label should be fully produced in Switzerland**

**This survey shows the importance of a Swiss origin (for food products) for most of the interviewed people.**

## 2. MAIN RESULTS

The Swiss consumers seem to care a lot about a Swiss origin for the food products they buy

- ↓ An indication of origin is an important factor when buying a food product for one fifth of the Swiss consumers but it depends on the product (24% for cheese but only 16% for potatoes).
- ↓ A *produit du terroir* should have its raw material coming from the area which gives its name to the product.
- ↓ The idea of quality is very strong behind a PDO product (for Swiss consumers).
- ↓ Every PDO(AOC) product (or products asking for a PDO) is not associated with a geographical area by all the Swiss consumers.

## 3. REFERENCES

### 3.1. Consumer surveys (2001-1998)

#### **Connaissance des AOC et des IGP (Knowledge about PDO and PGI).**

January 2001, Survey for l'Association suisse pour la promotion des AOC-IGP by IHA.GfM/Hergiswil

#### **Le pain de seigle valaisan.**

August 2000, Survey for Migros by LINK Institut

#### **Labels et IGP (Labels and PGI).**

November 2000, Survey for the Fédération romande des consommateurs by M.I.S.Trend SA

#### **Produits d'origine et origines géographiques**

1999, Survey for the Swiss Ministry for Agriculture by IHA. GfM

#### **Gruyère AOC.**

September-October 1998, Survey for the Institute for Agricultural Economics, EPFZ, Interbus 15/18 by IHA.GfM/Hergiswil

#### **Einstellungen und Erwartungne der Konsumenten Gegen über Herkunfts- und Qualitäts labels (the consumers' attitude towards Origin and Quality Label).**

March 1998, Survey for Agro Marketing Suisse by Demoscope Marktforschung, Adligenswil

### 3.2. Congress Proceedings, Research reports

1999

Dufour M.

#### **Communication et promotion des signes AOC et IGP en Suisse, Recommandations pour l'administration et les professionnels en Suisse**

Antenne romande de l'Institut d'Economie rurale de l'EPFZ

Dufour M. ; Barjolle D. ; Chappuis J.M.

#### **Etude consommateurs août-octobre 1998 :Critères d'achat, Gruyère et AOC**

Antenne romande de l'Institut d'Economie rurale de l'EPFZ

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Barjolle D. ; Chappuis J.-M. ; Dufour M.

#### **The Qualitative Consumer Survey. The Luizet Apricot of Valais, Progress Report 3 of the Project FAIR-CT 95-306 Ç PDO-PGI Products : Market, Supply Chain and Institutions", Antenne romande de l'Institut d'Economie rurale de l'EPFZ**

Barjolle D. ; Chappuis J.-M. ; Dufour M.

#### **The Qualitative Consumer Survey. The Gruyère**

Progress Report 3 of the Project FAIR-CT 95-306 Ç PDO-PGI Products : Market, Supply Chain and Institutions", Antenne romande de l'Institut d'Economie rurale de l'EPFZ

## Discussion report

The trend for regional labelled products and PDO-PGI is already very important in Switzerland and it is still increasing. However, there are very few scientific studies and tools to appreciate the consumers' attitude and behaviour towards these products and labels.

### 1. NEARLY NO STUDIES ABOUT CONSUMERS AND OLP

We don't know which percentage represent the OLP products in the whole Swiss consumption.

We don't know the consumers' attitude towards the regional products, what they expect, what makes them buy or not buy the OLP, what criteria are important for them when buying an OLP.

We would like to know what is the influence of an OLP label when the consumer buy a product.

Is the difference between the French Speaking consumers and the German ones so important in Switzerland? What about the Italian speaking ones? We have no studies at all about this last group.

We have not one single study to compare what the consumers say about their willingness to buy OLP products and what they really do (their behaviour).

We have no profile for the Swiss consumers.

We have no studies allowing us to learn to which arguments the consumers are the more sensitive when buying a OLP product.

### 2. WHAT IS THE EVOLUTION OF THE BUYING FACTORS?

One study gives us the most important factors for the consumers when buying a food product in 1998. Things might have change a lot since 1998 but no recent study allows us to draw any conclusion. For instance, a indication about the origin of the meat was not very important for fresh lamb in 1998 (buying factor for 17% of the interviewed consumers) but this result would probably be higher now.

### 3. WHAT MAKES CONSUMERS INTERESTED IN PDO OR PGI?

We have quite a few results about the knowledge the consumers have about the PDO and the PGI labels, but things are changing very quickly because the PDO-PGI system is currently under development and we are going to have more and more PDO products (first PDO product only in 2000). We do not know what is the most important for the consumers, what make them change their behaviour, what reasons make them trust or not this new label.

### 4. THE CONSUMERS HAS A LOT OF REQUIREMENTS TOWARDS *PRODUITS DU TERROIR*, BUT DO THEY CHECK THE PRODUCT MEET THEIR REQUIREMENTS WHEN BUYING THE PRODUCT?

We know that the consumers are not ready to accept *produits du terroir* or PGI whose raw material is not at least Swiss. Swiss consumers seem very attentive to the fact that a product with a geographical name is totally produced in the area which gives it its name, but are they going to check that such a product is Swiss or do they except it without trying to know it?

### 5. WHAT DOES IT REALLY MEAN WHEN THE CONSUMER SAYS THAT ORIGIN IS IMPORTANT?

We know that origin is important for the Swiss consumer, but which origin. Any origin as long as it is known (a precise spot), a Swiss origin, a regional or a local origin, an origin which suggest a well known place to the consumer ?

Does the origin give to the consumer the feeling that the product is safer or is it important because it gives an identity to the product? What is important when the consumers say that origin is important?

### 6. CONCLUSION

Lack of studies in Switzerland: we know very little about the factors which influence the consumers, their answer to marketing activities, their attitude towards OLP in general.