

Literature review WP 4

United Kingdom

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November 2001

Review report

1. IDENTIFICATION OF THE MOST RELEVANT RESULTS

Enteleca (2001)

Eat the View Consumer Research Literature Review.

Final Report prepared for the Countryside Agency, Cheltenham, UK. Enteleca Research and Consultancy Ltd., London, UK.

Desk study of UK consumer attitudes and perceptions to food, the environment and the countryside. Asserts much literature has been broad-based, focusing mainly on issues of food safety, quality, health and GM. On farm production issues, studies show consumers: generally are negative about perceived farming practices; distrust government, retailers and farmers; have a positive but passive attitude towards supporting environmental/welfare improvements but have unresolved conflicts between attitudes towards sustainability and the desire for all year round access to foods. Although many WTP studies show consumers are willing to pay more for sustainable products, actual behaviour is less certain: authors state that a minority have the actual income to allow them to do so, and there is an association of local/sustainable/speciality foods with higher prices and therefore higher income groups. (Indeed, a study is cited which found 64% of consumers WTP 20% more for food using 'safe and proper' methods of production, yet 59% said organic, free range and fair trade products are too expensive!) Labels like 'local' are flexible in meaning and may fail to take into account the complexities of the food chain. Overall, authors propose that consumer understanding of environmental/sustainability issues is vague and they do not make the link between consumption choices and the countryside. In fact, in meat products, they actively do not want to know about origins. Instead, health and safety are the focus. Retailers respond to consumer concerns with branding and labelling, but this does little to genuinely inform and educate the consumer. Similarly, media coverage, e.g. of BSE and GM shows how consumers can be influenced, but how these do not contribute to education either. Nevertheless, authors do conclude that communication messages have to be simple to work, otherwise most consumers won't bother. Question marks over how sustainably produced products should be promoted, e.g. on the basis of freshness, taste, quality, local, sustainable. Conclude that quality has to be a prime attribute. If promoted on the basis of origin, highlights how this can be at different levels, e.g. local, regional, 'British'. Highlights the dangers of continuing blurring between 'local' and 'sustainable'.

Enteleca (2000).

Tourist Attitudes Towards Regional and Local Foods.

Report prepared for the Ministry of Agriculture Fisheries and Food and the Countryside Agency. Enteleca Research and Consultancy Ltd., London, UK.

Study of tourists' attitudes towards local food and drink products, including in-home survey of 1600 English residents (investigating current awareness and interest in regional foods while on holiday); 1200 visitor interviews in 4 study regions (investigating awareness and use of local foods 'in situ'); 240 interviews with holiday makers after eating out (investigating patterns and expectations of eating out). This report strikes the distinction between local produce from an area and speciality produce which has unique, geographically related characteristics and qualities. Desk study finds that tourists have a vague notion of what is local, confusing local/regional/speciality, and for meaning, tend to draw from personal experience and geographic knowledge rather than official designations. Also points out that different tourists are attracted to local foods in different ways, e.g. some into gastro-tourism, others use food and drink as part of basic need satisfaction.

Research findings: vast majority of holiday-makers are interested in local foods, but won't necessarily try very hard to seek them out (implies need for good distribution and clear labelling). Identifies 5 segments: 1. Food Tourists (6-8%) very interested in food, though' not necessarily local food; Interested Purchasers (33%) believe food can play an important part of holiday and will try if available; 3. Unreached (17%) believe food can play a part, but currently don't try local food; 4. Un-engaged (24%) don't perceive food plays a part, but not negative to sampling local food; 5. Laggards (25%) no interest in local foods, unlikely to purchase. Widely held perception that purchasing local foods helps the local economy (82%) and environment (65%). and majority willing to pay premium, although complex issue of gift purchases etc. Only the most committed appear to make the distinction between local and speciality (the latter associated with uniqueness, distinctiveness, personal vs mass-produced, healthier). Overall, local foods perceived as 'traditional' rather than 'trendy'. Approx. Half of tourists buy local foods during visits (though' not necessarily speciality) with pubs, tearooms and fish and chip shops being most popular. Approx one third of tourists ate local foods at least once when eating out. When eating out, tourists are divided into 2 camps, 'leisure diners' (who value quality, freshness etc., which could include local foods), and 'convenience diners' (who are interested in known brands and portion size). Marketing recommendations: positive reactions to the idea of clearer branding/labelling of local produce. Overall identify 'food tourists' who are very interested and seek out local foods and who are motivated by quality. Local foods very important to their holiday experience - recommend marketing activities before this group leaves to reach them. They are a small group. Much larger is a generally interested group, who undertake less pre-planning and are more spontaneous, which would respond to marketing activities in situ, maximising the opportunities they have to sample. Recommend a 'fun' approach to reach these.

Henchion, M. ; McIntyre, B. (2000).

Regional imagery and quality products : the Irish experience.

British Food Journal 102(8):630-644

Regional imagery is increasingly being recognised as having a commercial value for the products of under-developed areas. It provides a subjective source of quality differentiation. Results of a consumer survey in Ireland indicate that region of origin is an important consideration for two out of three consumers when deciding to buy quality products and that products from rural areas are generally perceived to be of high quality. However, the links between region and quality products are under-developed as indicated by the fact that Ireland is seen as a single region and the low level of awareness for selected regional labels. The development of territorial linkages must be based on geographical sub-divisions of relevance to consumers and must be carefully managed to avoid unnecessary competition and duplication of effort. Discusses the use of regional imagery, reviews the meaning of quality and presents the results of a survey of Irish consumers focusing on their perceptions and behaviour in relation to regional quality products. It also draws some conclusions and makes recommendations of relevance to policy-makers and local development agencies.

Ilbery, B. ; Kneafsey, M. ; Jenkins, T. ; Parrott, N. ; Leat, P. ; Brannigan, J. ; Williams, F. ; Clark, G. ; Bowler, I. (2001).

Extracts from consumer research activities in UK.

Final Report of RIPPLE Project. University of Coventry, UK.

RIPPLE project involved an EU-wide study of the institutional, producer and consumer contexts of regional speciality foods (RSF) /quality products and services (QPS). This document reports the results of the consumer component in the UK. The study involved a survey of 358 UK consumers (171 in West Wales, 187 in Grampian), investigating their perceptions of quality ; behaviour relating to regional products and services;

use of marketing channels; general perceptions of regionality. Results were: perceptions of what constitutes a quality product varied widely and differ according to product and location. In both regions, manufacturers' brand names were considered an indicator of quality, and official certification schemes were perceived to be important although awareness of specific examples of the latter was quite low. In relation to QPS, found that most of the sample say they purchase regional products, claiming region of origin is important and saying they expect to pay more for it. Positive opinions about buying local products made by local firms (though not very discriminating between types). Rural consumers favour small shops and markets for purchasing, urban favour supermarkets. Older consumers seemed to have greater loyalty in buying local products, younger more interested in quality and aware of non-local specialities. In tourism services, found that intangible and subjective factors more important to perceptions than official certification. High claimed reliance on word of mouth as source of info on QPS, therefore conclude that marketing info has indirect impact on perceptions. Between 15% and 32% of consumers say they do not purchase QPS, due to income constraints and lack of availability (not clearly labelled/lack of small scale outlets). Overall, seem to find that consumers do make a link between quality products and region of origin, although the products vary by region and in some areas (Scotland), link is more strongly perceived than in others (Wales). Conclude that because respondents did not perceive much difference between images of study areas and those of the wider regions, pan-regional branding is likely to be most effective, although the selection of a unifying theme to be used for each region is proving problematic (e.g. whether it should be historic/traditional or more contemporary).

Kupiec, B. ; B. Revell (1998).

Speciality and artisanal cheeses today: the product and the consumer.

British Food Journal 100(5): 236-243.

Reports on a survey of 56 retailers and 101 consumers (in speciality cheese shops) located in Scotland, incorporating multivariate analysis. Typical artisan cheese consumers were found to be in 35-54 age group, ABC2s, quite wealthy and well-educated. Artisan cheese was purchased most often on a weekly basis, in less quantity than industrial cheese. It tended to be purchased for special occasions. Quality and flavour were the most important properties influencing purchase decisions, with price and functional attributes less important (intangible, image-related attributes taking precedence over tangible and sensory). An element of 'anti-industrialism' also seemed to influence purchase, with food scares surrounding craft production not dissuading consumers from purchase of these products. However, following theories of the post modern consumer, it is argued that purchases of artisan cheeses are motivated by variety-seeking behaviour, suggesting a low degree of brand or even cheese type loyalty amongst such consumers. The plural nature of the speciality cheese market accommodates well the highly individual and fragmented requirements of consumers of artisan cheeses.

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Tregear, A., ; S. Kuznesof ; A. Moxey. (1998).

Policy initiatives for regional foods : some insights from consumer research.

Food Policy 23(5):383-394.

Qualitative study (8 focus groups) of consumer perceptions of regional, and northern, foods in the UK. Found that regional food is perceived to be food with a tradition and heritage, based on aspects of physical locale, socio-economic circumstances of producers/consumers, and customs of local people. Specifically, regional food tended to be associated with people from lower income groups, in addition to be being thought of as food suited to particular climatic or physical environmental conditions. Also found that regional food that is perceived to be authentic has heightened attractiveness and appeal. Perceived authenticity was found to be influenced by personal, product related and situational factors. Personal factors included the degree of personal experience consumers had with a particular product : where personal experience existed, consumers were confident in asserting whether or not a product was authentically 'regional'. Where lack of personal experience existed, consumers tended to focus more on product related factors, such as scrutiny of packaging, labelling, shape, form and ingredients. It was found that some product-related factors, such as artificial additives on the label, detracted from authenticity. Finally in terms of situational factors, authentic regional foods were associated more with speciality shops and delicatessens than with supermarkets, and with pubs rather than hotels. Sampling regional products in their place of origin, e.g. when being a tourist, was thought to be a way of getting the 'genuine' version of these foods. Findings imply that policymakers and regulators of regional foods need to take account of the marketing aspects of these products : as awareness of official designations such as PDOs/PGIs was low, consumers use other product indicators (e.g. labelling, imagery, symbolism) to interpret the 'regional' credentials of a product. These latter aspects therefore play an important role in influencing consumer demand.

Wilson, N. ; A. Fearn (1999).

A link between modernity and tradition: the case of several regional food products.

Paper presented at: The socio-economics of origin labelled products in agrifood supply chains: spatial, institutional and co-ordination aspects. 67th EAAE Seminar, Le Mans, France, October 28-30, 1999.

Draws from theories of postmodern consumption to explain the (re)emergence of speciality regional foods in the UK. Identifies that demand for OLPs could stem from their 'green' credentials (consumers worried about food miles), their compassion (support for the smaller trader and fair trade issues), consideration for animal welfare, concern for the disintegration of local communities. Argues that the 'protection of origin' legislation is a by-product of more general trademark and passing off law in the UK - traditionally, there is no special link made between product qualities and geographic origin in law. Reports on the results of focus group research (9 groups, mostly BC1 women), investigating their perceptions of potatoes (Jersey Royals), lamb (Scotch lamb) and cheese (West Country Farmhouse Cheddar). Found that awareness of PDO/PGIs in the UK was low, although identification of the issue relating to wine etc was found. Some consumers thought that designations would guarantee authenticity, which was positive, although others were more sceptical and felt they would artificially inflate prices, and was protectionist. Ready, positive, images of landscapes and environments were evoked from OLPs such as Jersey Royals, Scotch Lamb and Cheddar. In the main, bucolic, rural, touristy. Traditionality was only thought to be good if it did not compromise quality, and there was some scepticism about producers' claims regarding the special nature of their products not matching up with reality. OLPs also suffered from 'posh' image and were associated with high prices.

2. SELECTION OF SCIENTIFIC AND RECENT PAPERS

2.1. Books 2001-1995

Montanari, M. (1994).

The Culture of Food.

Oxford, Blackwell. Ch6 'The Revolution'.

Provides sociologically inspired commentary on the broad trends shaping food preferences and consumption patterns in Europe in C20th. Overall, sees that forces of industrialisation and internationalisation have homogenised consumption patterns, led to egalitarianism of food consumption, but also the 'delocalisation' of the food system, breaking down links between food, territory and seasonal variations, such that food provisioning is organised around protection of the state. Highlights ironies of food preferences in C20th, relative to those of previous centuries - desire for seasonality, yet previously tried to extend seasons; desire for fresh and local, yet previously populations were 'imprisoned' by local foods; desire for dark and rustic, yet previously wanted white and refined. "Only a wealthy society can afford to appreciate poverty". Argues that previously, regional food was the 'natural order of things', that people were aware of geographic origins by course, something which has been lost through internationalisation. Notes the problems and preoccupations which come from 'a fear of plenty rather than a fear of famine' - diet, health, symbolism, fat, ethics. Also attests that with delocalisation, greater uniformity of diets exists, enhanced further by: social mobility and greater familiarity with the rest of the world; attenuation of seasonal restrictions; decline of food rituals and occasions, loss of cultural significance of foods. Foods offered as 'gastronomic dossier' with no cultural markers or pointers.

Warde, A. (1997).

Consumption, Food and Taste.

London, Sage Publications.

Analysis of the nature of (food) consumption in present day developed economies, from a sociological perspective. Highlights that the subject of consumption can be studied from a materialist perspective (consumer behaviour, practicalities of marketing commodities) or a cultural perspective (analysis of signs, symbols, texts, constructs). Contrasts theories of Bourdieu, who argues that in C20th, consumption is an expression of one's place in society or 'habitus', with those of Beck, who argues that consumption options free individuals to express their identities in different ways. On these bases, proposes 4-quadrant diagram categorising changing consumption patterns, each quadrant representing a different 'trajectory'. 1: uncertainty about consumption; 2. niching of consumption; 3. uniformity of consumption; 4. entrenchment of consumption by social structure. Following a systematic analysis of magazine adverts, and National Food Survey data, proposes 4 'antimonies' of taste driving decision-making in food choice: 1. novelty-tradition; 2. health-indulgence; 3. economy-extravagance; 4. convenience-care. Importantly, argues that traditional cuisines offer moral or esthetic anchor in modern world.

2.2. Congress Proceedings, Journal Articles, Book Sections

2000

Acebron, LB ; Dopico, DC

The importance of intrinsic and extrinsic cues to expected and experienced quality: an empirical application for beef.

Food Quality and Preference, 11 (3), 229-238.

Bech, A C ; Juhl, H J , Hansen, M ; Martens, M ; Andersen, L
Quality of Peas Modelled by a Structural Equation System,
Food Quality and Preference, 11 (4), pp. 275-281.

Ilbery, B. ; Kneafsey
Registering regional speciality food and drink products in the UK: the case of PDOs and PGIs.
Area 32(3):317-325.

1999

Baker, GA

Consumer Preferences For Food Safety Attributes In Fresh Apples: Market Segments, Consumer Characteristics, And Marketing Opportunities.

Journal Of Agricultural And Resource Economics, 24 (1), pp.80-97.

Bredahl, L

Consumers' cognitions with regard to genetically modified foods. Results of a qualitative study in four countries.

Appetite, 33 (3), pp. 343-360.

Ilbery, B. ; M. Kneafsey

Niche market sand regional speciality food products in Europe: towards a research agenda.

Environment and Planning A 31(12):2201-2222.

1998

Bessiere, J.

Local food development and heritage : traditional food and cuisine as tourist attractions in rural areas.

Sociologia Ruralis 38(1):21.

Trognon, L.

The influences of territorial identity on consumer preferences. In: consumer preferences for products of own region/country and consequences for food marketing.

In: AIR-CAT Workshop Vol 4(3), April 1998, Kiel, Germany.

Verlegh, W. ; Steenkamp, E.

Country of origin effects: review and meta-analysis. In: consumer preferences for products of own region/country and consequences for food marketing.

AIR-CAT Workshop Vol4(3), April 1998, Kiel, Germany.

Zeithami, V.A.

Consumer Perceptions of Price, Quality and Value: a Means-end Model and Synthesis of Evidence.

Journal of Marketing, 52 (July): 2-22.

1997

Frewer, L.J. ; Howard, C. ; Hedderley, D. ; Shepherd, R.

Consumer attitudes towards different food-processing technologies used in cheese production - The influence of consumer benefit.

Food Quality And Preference, 8 (4), pp. 271-280.

Grunert, KG

What's in a steak? A Cross-cultural study on the Quality Perception of Beef.

Food Quality And Preference, 8 (3), pp. 157-174. 1997

Valli, C.

International Food Market Segmentation : A Conceptual Framework for the Operationalization of Segmentation Results in a Pan-European Context in : Globalisation of the Food Industry : Policy Implications.

The University of Reading.

1992

Finn, A. ; Louviere, J.J.

Determining The Appropriate Response To Evidence Of Public Concern- The Case Of Food Safety.
Journal Of Public Policy & Marketing, 11 (2),pp. 12-25.

Discussion report

1. RESEARCHING THE LINK BETWEEN OLPS AND CONSUMERS: THEORETICAL AND ANALYTICAL TOOLS

A relevant starting point from the perspective of the customer requires an appropriate model or framework for understanding the consumer buying process. The elements of this model needs to address issues of motives quality, value, satisfaction, health, safety, risk and culture. For example on the matter of motives, current literature reveals an increasing orientation to health, convenience and quality. Current literature deals with some of these elements. For example Grunert et al (1996) propose a Total Food Quality Model. The model considers both before and after purchase situations. Quality in the before stage is determined by technical product specifications, perceived intrinsic and extrinsic quality cues, consequently on expectations of quality and perceived costs. In the after purchase situation, sensory qualities influence experienced quality and purchase involvement fulfillment. Zeithaml (1988) adapts a model by Dodds and Munroe (1984) to provide a model linking the concepts of price, perceived quality and perceived value.

With respect to food quality there are both supply side and demand issues. On the supply side quality is established through achievement of minimum standards and certification. On the demand side quality is considered to be a perceived by consumers (see Grunert, 1995, 1997). Further, that it is multidimensional, subjective (Grunert and Grunert, 1995), contextual and dynamic and linked to both intrinsic and extrinsic cues (Acebron and Dopico, 2000; Cardello, 1995). The influence of satisfaction and value are linked to expected and experienced quality (Lange et. al., 2000).

An alternative conceptualisation of consumer preference and choice decisions draws from sociological and post modern theories of the consumer. These argue that consumer preference and choice is based on the desire to engage in experiences and respond to subconscious needs. Literature on these perspectives of OLP consumption is discussed in 'Factors influencing choice and consumption of OLPs.

In terms of turning these above perspectives into empirical research studies, a range of appropriate methods are suggested and used. A review of current literature reveals several relevant methodological bases for research including qualitative, quantitative and integrated methods. With respect to **qualitative research**, See, for example Durgee (1985) on depth interviewing techniques, Gregory (1995) on the use of qualitative research in the sociology of food whilst general texts are presented on the long interview (McCracken, 1988) and qualitative data analysis in general (Miles and Huberman, 1984). Integrated methodologies are discussed by Jarrat (1996), Gilmore and Carson (1996) and Jarrat (1996). There is a wealth of material, much emanating from MAPP Centre at the Aarhus School of Business, Denmark, in the area of **means-end chain analysis** that bridges qualitative and quantitative research to model consumers' cognitive structures in which product attributes are linked to benefits and motives (Grunert, 1997). Means-end analysis has been applied to many areas of relevance to the Dolphin's study in the context of food choice and marketing. For example, much research has been conducted in the area of consumers' attitudes and perceptions, including quality issues. From this perspective the technique has often been extended to the formulation of marketing strategies for distribution, communication, benefit segmentation and promotion (Olsen and Reynolds, 1983; Reynolds and Rochon, 1991). This technique has been applied, for example to concerns about genetically modified food in European countries (Bredahl, 1999).

A second common methodology for the analysis of purchase decisions is **conjoint analysis**, which models consumers preferences for alternative product profiles specified in terms of specific levels of product attributes. The model is typically used to identify consumers' ideal products, the relative importance of attributes and to establish consumer preference segments, in conjunction with cluster analysis. Baker (1999) and Baker and Crosbie (1993) for example applied this analysis to food safety in apples. Frewer et. al. Have applied conjoint analysis to consumer attitudes to different (cheese) processing technologies. On food safety, Finn and Louviere (1992) investigated the action consumers require of government in the context of food safety. A third area worthy of investigation is the use of **structural equation modelling (SEM)**. The advantage of this methodology is the prospect of modelling a complicated inter-linked system, for example depicting various influences on consumer choice using both measured and latent variables. For example, Bech et. al. (2000) have used SEM to model quality of peas.

2. THE 'TYPICAL' OLP CONSUMER

In terms of getting in sights into who the 'typical' OLP consumer is, empirical findings reported here seem to confirm that such consumers are in the 25-45, highly educated, quite wealthy, ABC1 category (Kupiec and Revell, 1998; Tregear et al, 1998). In terms of consumers as tourists, it appears that there is a relatively small section of the population which is 'very interested' in regional/local products, and will actively seek these out as a pleasurable part of their holiday. Beyond this, there is a larger segment of 'quite interested' tourists in the UK who enjoy regional/local foods but who donot necessarily actively seek them out (they will try them if available or clearly labelled) (Enteleca, 2000).

3. FACTORS INFLUENCING CHOICE AND CONSUMPTION OF OLPS

Much work exists on consumers attitudes to food safety (Nygard and Storstad, 1998; Shaw, 1999), health and nutrition including genetically modified foods (Bredahl, 1999), consumer trust (Brom, 2000), organic foods (Huang, 1996) and willingness topay for pesticide free food (Huang, 1993).

In terms of factors influencing consumption behaviour of OLPs, the literature reported here identifies numerous reasons why people buy regional products, including environmental concern (purity issues and 'food miles'), animal welfare concern, health, adventure-seeking, desire forenhanced/gourmet quality (including enhanced sensory characteristics), ethnocentrism/local pride, desire to support local economies/farmers. Often, consumers expect to pay higher prices for these kinds of products and state they are willing to do so (Ilbery and Kneafsey, 1999), although there is some resistance to regional/local images being used to inflate product prices when the quality does not match the image (Wilson and Fearn,1999). Actual purchasing behaviour is also doubt fully linked to stated WTP, and there are unresolved conflicts and anomalies between consumers' stated preferences, for example, simulataneous demand for sustainably produced food and year-round accessibility of foods (Enteleca, 2001).

In terms of theories to explain the above motivations or factors influencing consumers' interest in OLPs, sociological studies reported here (e.g. Bessiere, 1998; Montanari, 1994; Trognon, 1998; Warde, 1997) offer useful ideas. In particular, theories of the postmodern consumer are referred to. It is argued that modern urban consumers, distanced from their cultural roots and faced with industrialised foods which have no cultural roots underpinning them, find products which convey aspects of heritage, tradition and proximity to nature very appealing. They buy the min order to participate in a type of food production and consumption which is built on solid communities and respect for nature. Motivations of nostalgia are also important. Overall, these theories convey the argu-ment that OLP consumers are not just interested in the physical, sensory aspects of products, but respond to the intangible and imaginary qualities of such foods. They seek to buy into a total experience, particularly when playing the part of a tourist or visitor to an area. These intangible aspects may of course influence perceptions and ratings of the former, physical or sensory aspects. No studies were found in the UK which focused specifically on consumer perceptions of the sensory characteristics of OLPs.

4. MARKETING, COMMUNICATION AND INFORMATION ASPECTS OF OLPS

In terms of the circumstances surrounding the consumption process, and the influence of marketing variables, the studies reported here (e.g. Ilbery etal, 2001; Henchion and McIntyre, 2000) found that consumers desire clear labelling of OLPs, yet in practice, are not very discriminating between different types

of local/regional/speciality products. Consumers' awareness and understanding of different types is vague, and their knowledge of labelling schemes and official certification marks is hazy. Furthermore, when purchasing products, evidence suggests that consumers rely upon the subjective aspects of products (e.g. imagery, symbolism) as much as the objective aspects (e.g. sensory) to make their choices. This seems to be particularly so when consumers have little personal experience of products, or are relatively new to them (Tregear et al, 1998). In terms of marketing channels, consumers appear to be divided between wanting to purchase these products in small, specialist and local outlets and using supermarkets. Whilst some studies find consumers associate specialist and direct outlets with more authentic or better quality OLPs, Ilbery et al (2001) find that consumers are segmented by age on the issue of marketing channels, with older consumers showing greater preference for using local shops to buy local products. Over all it must be remembered that supermarket chains account for 75% of food sales in the UK. In terms of communication, it appears that word of mouth recommendations are often cited by consumers as sources of knowledge, although this does not imply that commercial communication activities have little influence - instead they may impact upon key individuals who then 'spread the word' (Enteleca, 2000). A final point in terms of communication is that awareness of PDO/PGI, or other official designations relating to OLPs in the UK, is very low. The marketing and communication activities of individual producers or firms therefore play a more important role in shaping consumer perceptions of these products than official designations.

In terms of general marketing environment Doel (1999) studies the change in supplier –buyer relations and its change to one of trust rather than confrontation. Baker and Knox (1994) use means–end chain analysis to consider cross-cultural in a pan-European context. Binkley and Connor (1998) consider how retail food prices are influenced by changes in market conditions. Jackson (2000) addresses the issue of labelling as a vehicle for improved communication in the labelling of bio-technology products. Caswell and Padberg (1992) consider the role of food labelling and its impact on consumer confidence in food quality and education of the consumer. Geiger et. al (1991) research consumer acceptance of food label styles using adaptive conjoint analysis. In terms of distribution one of the emergent channels of distribution is direct marketing and Internet-based marketing especially. Gigon and Crevoisier (1999) consider the situation of Switzerland and find that expected changes towards closer buyer-seller relations did not materialise.

In the UK literature, very little has been found relating to citizen behaviour and OLPs.

5. POLICY RELATED ISSUES

One of the areas investigated, though least successfully, concerned the wider environment in which agricultural activity takes place. The main issues here are linked to the international environment, specifically to globalisation and trade liberalisation and to issues of rural development. There is some material based upon GATT/WTO trade negotiations dealing with a range of issues such as non-tariff trade barriers and welfare (Bureau et.al., 1998), the potentially negative impact on eco-system health and nature conservation (Buckingham, 1998; Potter and Goodwin, 1998) and consumer concerns and trust and food safety (Brom, 2000; Kinsey, 1993). In the area of international trade some issues concern effects on European support and resistance to third country competition (Guyomard et al. 2000), EU budget constraints (Matthews, 1996) and trade competitiveness (Swinbank, 1996).

6. NEED FOR NEW RESEARCH

- further exploration of the intangible and imaginary elements of olps, and their impact on consumer perceptions. Projective techniques may be useful for this.
- further exploration and possible quantification of the different motivations to purchase, e.g. Health, safety, welfare, environment, novelty, attempting to link these to different types of products. This could also include investigation of the 'trade-offs' consumers make, e.g. Between sustainability, local, welfare, quality, familiarity, brand names, origin-labelled, when making purchase choices of olps. A conjoint approach may be useful here.
- further investigation of consumer perceptions of the different types of olps. Currently, many UK consumers do not appear to distinguish meaning fully between local products, regional products, branded products from individual manufacturers. Therefore it would be of value to examine in more detail what 'place' - at different levels and types - actually means to people.
- investigation of the potential of official certification to impact positively upon consumer perceptions. This would require comparing evidence from different EU countries, where levels of awareness vary. It would also be useful to study consumer perceptions of pdos/pgis in the context of other certification schemes for 'like' products, e.g. Organic, welfare friendly, quality specific.
- it would also be useful to examine exactly what role olps play in the dietary and culinary repertoires of different types of consumer (and for different types of OLP). For example, whether olps are treated as gourmet specialities, cooking ingredients, or everyday items. This would help to give a deeper understanding of consumer attitudes and perceptions. The use of observations and food diaries would be appropriate methods of research.
- development of a framework or model for understanding consumer behaviour and olps, ideally which would integrate both qualitative and quantitative approaches. Within this broad framework there is great potential in linking means-end chain analysis to a quantitative framework such as conjoint or SEM analysis.
- there is a need to address cross-cultural issues. For example the food culture of the Mediterranean countries contrasts with that of northern Europe despite some degree of convergence within the EU.