FOCUS-BALKANS

Ljubljana, Slovenia, 21-22 June 2010

Traditional food seen by European consumers and attitudes to innovations in this product category.

Margrethe Hersleth, Nofima Mat, Norway

Partners TRUEFOOD WP1: INRA, IRTA, Nofima Mat, PEGroup, University Gent and Warsaw Agricultural University

Outline

- General information about TRUEFOOD
- Consumer studies in TRUEFOOD
- Some selected results
  - Consumers' definition of traditional food
  - Consumers' image of traditional food
  - Profile of typical consumer of TF
  - Knowledge and image of PDO, PGI and TSG
  - Innovation acceptance related to traditional food
- Summing up

TRUEFOOD

Contract no. FOOD-CT-2006-016264, 6th framework programme

Objective: Introduce suitable innovations into the traditional food industry to maintain and increase the competitiveness of the industry in an increasingly global European market place

TRUEFOOD: Management structure

Overall Project Coordination
European National Food Industry Federations (SPES)

Scientific Pillar
Management - INRA

Industrial Pillar
Management - ENEA

WP1: Consumer aspects

WP2a: Improving microbial safety

WP2b: Control of chemical hazards

WP3: Risk assessments

WP4: Improving nutritional quality

WP5: Marketing and supply chain

WP6: Pilot scale evaluation

WP7: Environmental, societal, human and economic impacts

WP8: Dissemination, training and technology transfer

Overall objective in Truefood WP1:

”To determine consumer perception, expectations and attitudes towards Traditional Food Products and Innovation acceptance related to Traditional Food Products”.

Important reseach questions

- What is a Traditional Food Product seen from consumers' perspective?
- Which attitudes do consumers have to traditional food?
- Which attitudes do consumers have to innovations in traditional food?
- How do innovations in traditional food affect acceptance and willingness to pay for the products?

Why is this knowledge important?

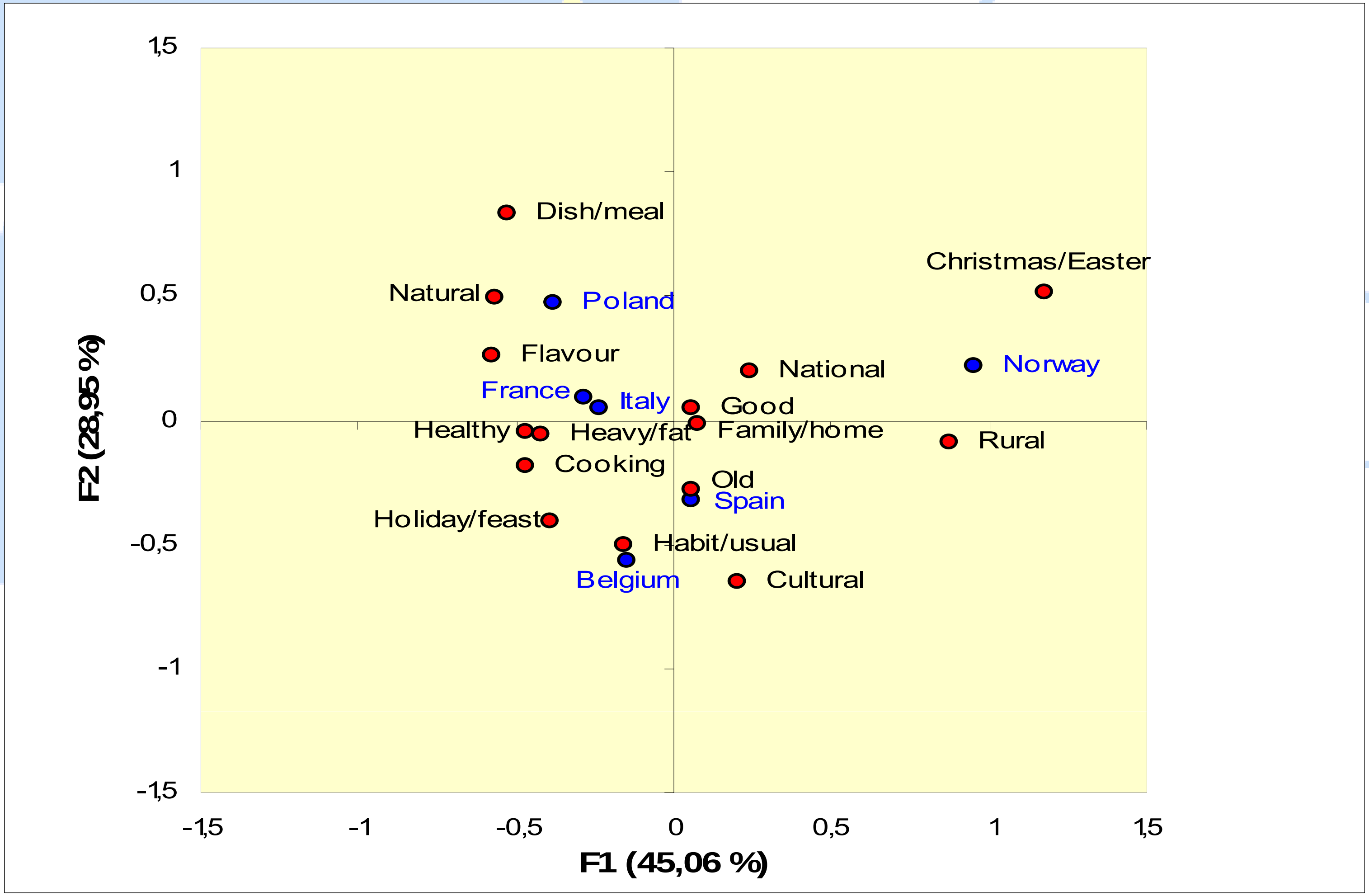
- As input for other WPs in Truefood
- For the traditional food industry sector in Europe
  - Communication
  - Marketing
  - Development (innovations) of products
  - To maintain a good image
- In general
  - Meet European consumers' interests

Approach for cross-cultural studies in WP1

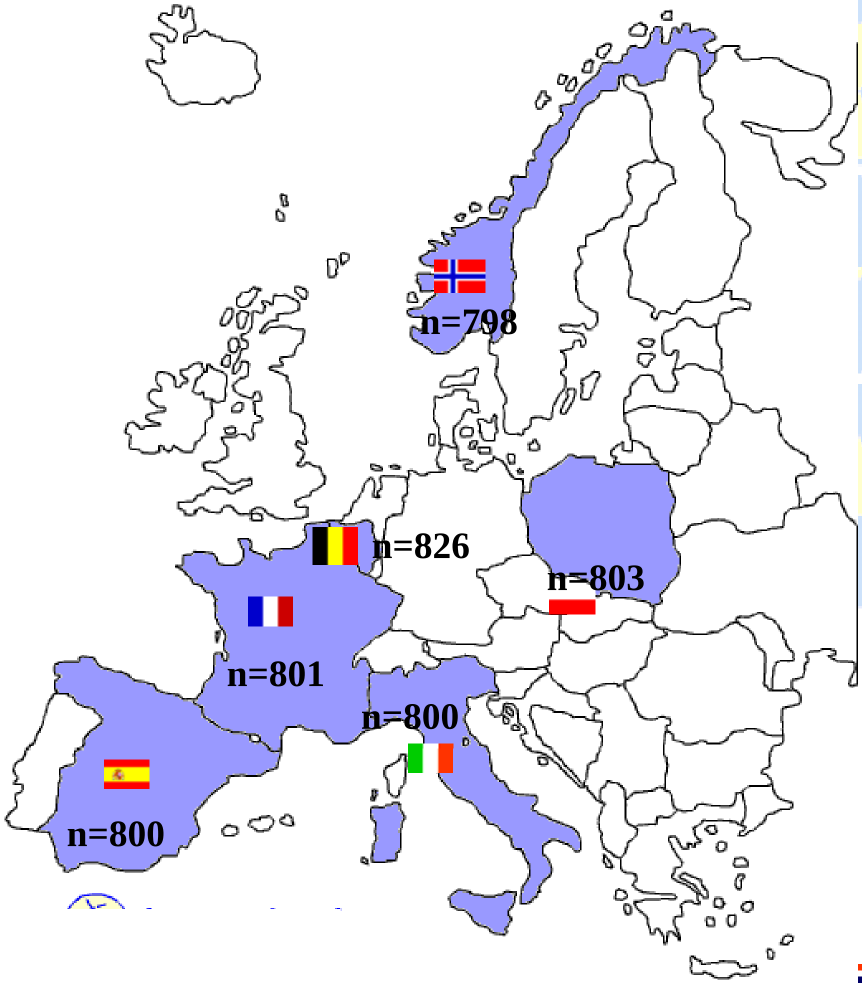
- Focus groups
- Word Association test
- Survey
- Experimental studies including tasting of products
- Countries involved: Belgium, France, Italy, Norway, Poland, Spain

Consumers' associations to "traditional"

N = 721 – corr. analysis



Survey



- TRUEFOOD consumer data
- Self-administered
- Internet-based survey
- TNS European Online Access Panel
- Oct-Nov 2007
- Spain, France, Italy, Belgium, Poland, Norway
- Representative for
  - Age, Gender and Region
- n=4,828 valid cases

Focus group results
Associations
(consumers)

Working definition
(supply chain)

Survey

Consensus multi-dimensional definition
for the concept of traditional food

Definition of Traditional Food Products seen from consumers' perspective

(Belgium, France, Italy, Norway, Poland, Spain)

Refs: Guerrero et al, 2009, Vanhonacker et al, 2010

”A traditional food product is frequently consumed”

”or associated with specific celebrations and/or seasons”

”transmitted from one generation to another”

”made in a specific way according to the gastronomic heritage”

”naturally processed”

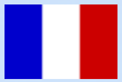
”distinguised and known because of its sensory properties”

”and associated to a certain local area, region or country”

Image of Traditional food in Europe

ref: Lengard et al, resubmitted

Very negative			Neither positive nor negative			Very positive
1	2	3	4	5	6	7

					
5.51	5.62	5.93	5.71	6.01	6.04

- General positive image

Image of Traditional food

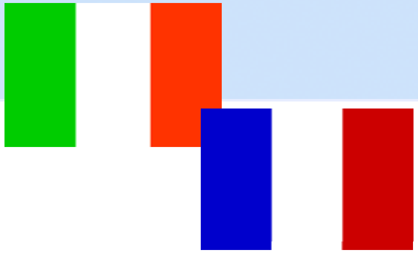
- Attributes that contribute to this image
  - a high and constant quality
  - a special and good taste
  - high safety
  - high nutritional value
  - supportive of local economy

  - And… a high price and a long preparation time are factors associated to TF

A typical traditional food consumer
(ref. Vanhonacker et al, in press)

Middel-aged and health-conscious

Food connoisseur, enjoys cooking



Ethnocentric

Family is important

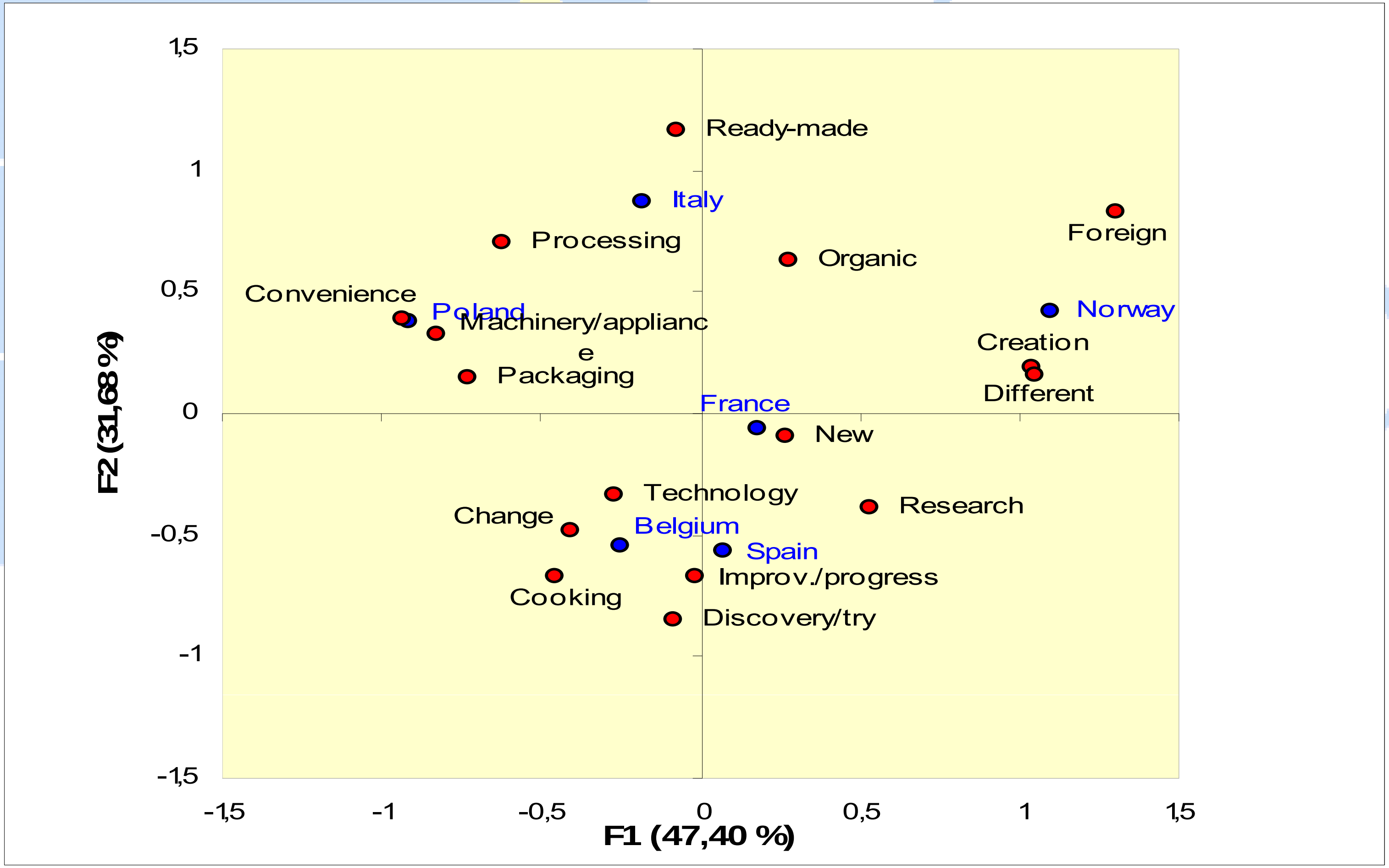
Information issues - PDO, PGI and TSG (survey results)

- "Have you ever heard about PDO?"
  - 47% (Be), 35% (N), 39% (Pl)
  - 98% (Fr), 95% (It), 96% (Sp)

- "To which degree is PDO a signal of better quality?"
  - ≥ 5 on a scale 1-7: 92% (Fr), 93% (It), 92% (Sp)
- "To which degree is PDO a signal of distinctive character?"
  - ≥ 5 on a scale 1-7: 86% (Fr), 89% (It), 92% (Sp)
- "To which degree do PDO impact on choice?"
  - ≥ 5 on a scale 1-7: 80% (Fr), 84% (It), 80% (Sp)

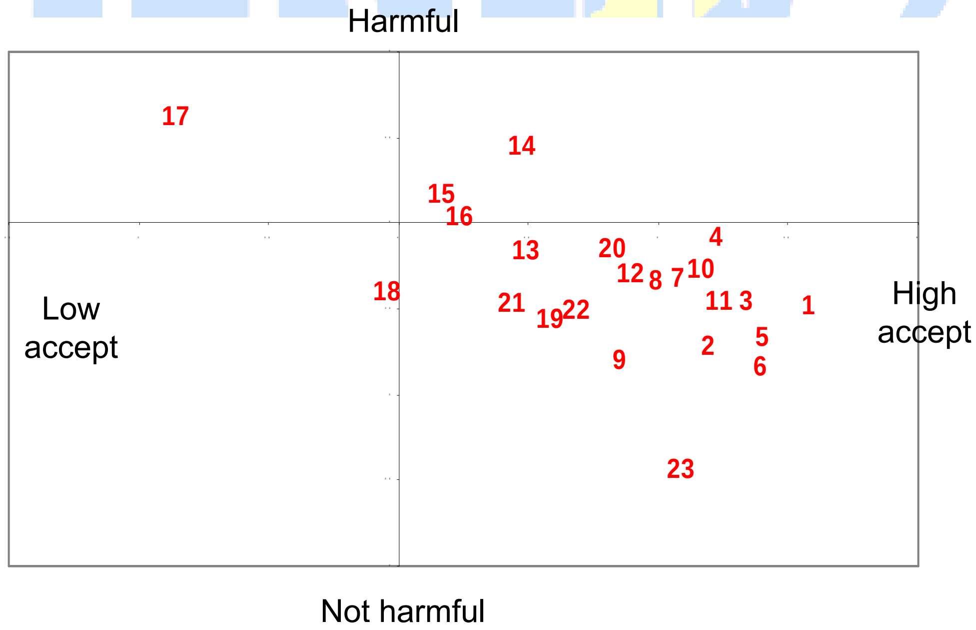
Are innovations in Traditional food welcomed by consumers?

Consumers' associations to "innovation" (related to TFP). N = 721 – corr. analysis



Results innovation acceptance (survey)

- 23 possible innovations in TFP
- Intention to consume (acceptance) ?
- Harmful for the traditional character ?



1) Label for authenticity
2) Organic raw materials
3) Improving safety
4) Reduction of fat
5) Preserving sensory quality

23) Direct from producers
15) Pre-cooked food, ready to eat
17) Vending machines
18) Home delivery

Approach in the experimental studies

Expectations and sensory perception of food

(Theory in Deliza and MacFie, 1996)

- Many consumers are concerned about the ”history” of the food

- Relevant information
  - Origin of raw materials
  - Production process
  - Nutritional information

Traditional food and expectations

- It is important for food producers to know how the consumers will respond to a change in a product (how the expectations may be influenced)

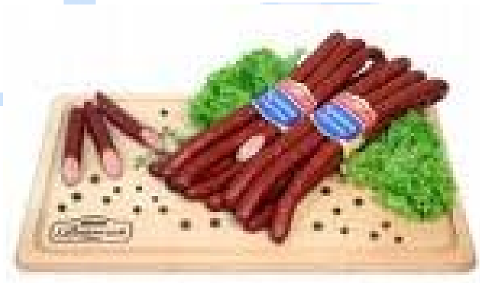
- Approach 1
  - Blind test, tasting products – acceptance (liking)
  - Only information about the product - expected acceptance (liking)
  - Information and tasting – acceptance (liking)

- Approach 2
  - Conjoint

- Possible responses
  - Acceptance (hedonic liking)
  - Purchase probability
  - Willingness to pay

Example: Kabanos – a traditional Polish sausage

- Product: traditional sausage “kabanos”.
- Innovations:
  - health benefits (reduced salt level)
  - method of production (organic),
  - packaging (biodegradable packaging)
  - taste (spicy variant)
- Consumers
  - From two cities:
    - Warsaw: n=110
    - Krakow: n=118

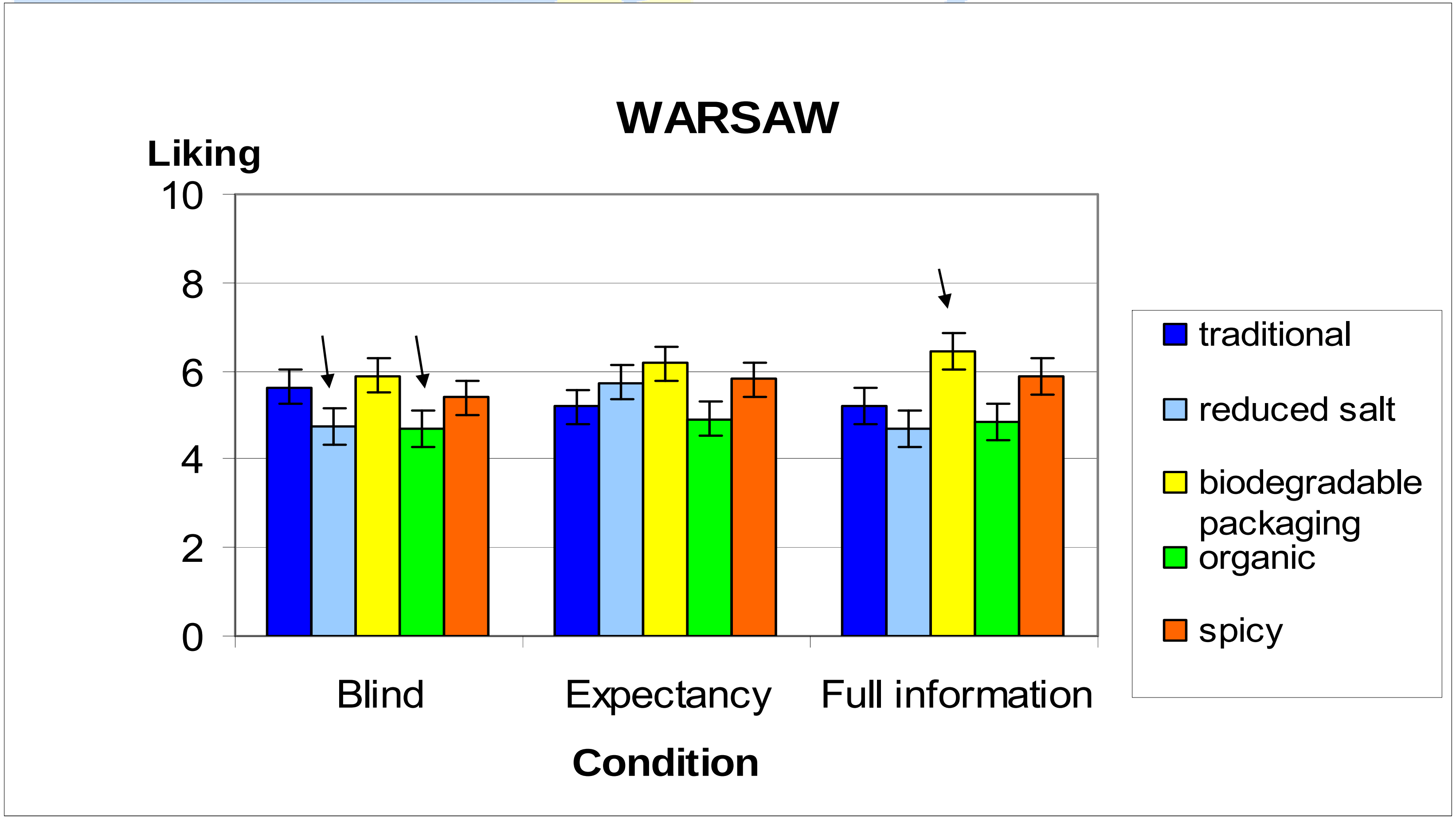


Procedure for consumertest in Poland

- Blind condition: taste only
  - Acceptance rating on a nine-point hedonic scale
    Reservation price
- Expectation condition (external information only)
  - Acceptance
  - Reservation price
- Full information condition (taste + label)
  - Acceptance
  - Reservation price

Experimental study in Poland – Kabanos (sausage)

In blind condition: reduced salt and organic less liked ($p<0.05$)
In full information: biodegradable packaging most liked ($p<0.05$)



Example: Traditional cheeses in France and Norway (Epoisses and Jarlsberg)

- The objective was to study effects of 6 different innovations on buying intentions of traditional cheeses in France and Norway
- Factors (innovations)
  - Pasteurisation/raw milk (=innovation)
  - Packaging: traditional/new (=exclusive)
  - Organic
  - Omega 3
  - Price: standard/+20%
  - Situation: everyday/special occasions

Conjoint design for cheese experiment

	Level 1	Level 2
Milk	Raw milk (Fr)	Pasteurized milk (Fr)
Increased level of omega-3	No	Yes
Packaging	Traditional	New
Organic	No	Yes
Price	6.90 € (Fr)	8.30 € (Fr)
Situation	Everyday use	Special occasions, celebrations

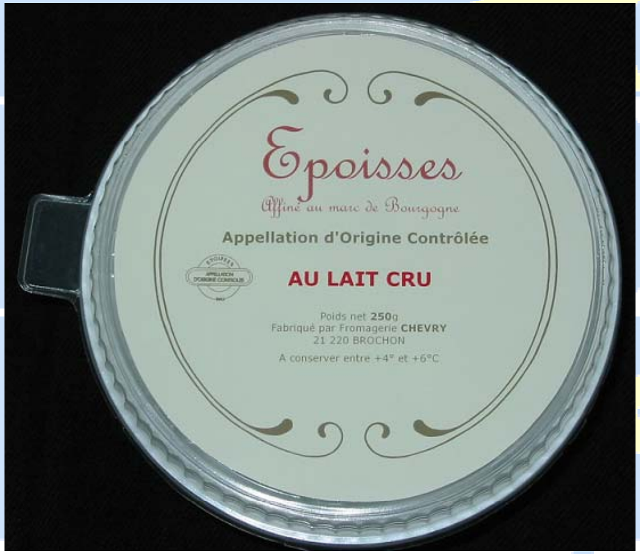
Product presentation in France

Price: 6.90 €

Are you willing to buy this cheese for everyday use?

Definitely would not buy	1	2	3	4	5	6	7	8	9	Definitely would buy
	☐	☐	☐	☐	☐	☐	☐	☐	☐	

Product presentation in France

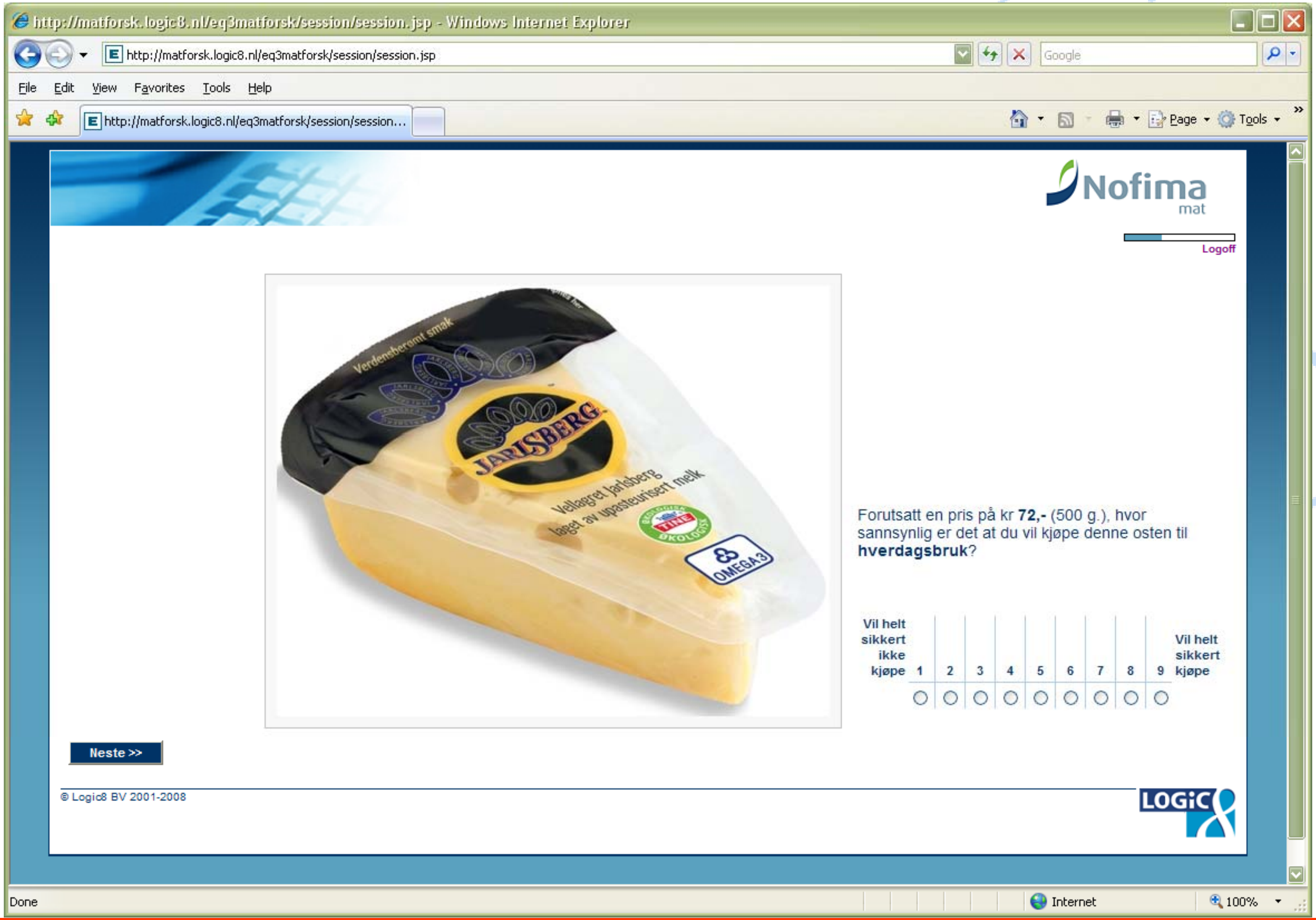


Price: 8.30 €

Are you willing to buy this cheese for special occasions/celebrations?

Definitely would not buy	1	2	3	4	5	6	7	8	9	Definitely would buy
	☐	☐	☐	☐	☐	☐	☐	☐	☐	

Product presentation in Norway



Results Jarlsberg and Epoisses

- Past: No +, Fr –
- Omega 3: Fr/No ns
- Packaging: Fr –, No ns
- Organic: Fr +, No ns
- Price: Fr/No – (for 20% higher price)
- Appropriateness: Important in both countries
  - Increased WTP for special occasions
  - New packaging suitable for special occasions (No)

Overview of experimental studies

Acceptance, willingness to pay or probability of buying

	Dry cured ham (Fr, It, No, Es)	Cheese (Fr, It, No, Es)	Smoked salmon (No)	Sausage (P)
Salt reduction	x		x	x
Selected genotype	x			
Omega-3		x		
New taste				x
Organic		x		x
Origin	x			
Brand	x			
Packaging		x		x
Pasteurisation/ raw milk		x		
New process	x	x	x	

Summing up – innovations in TFP

- Experimental studies demonstrated a diversity in results
- Acceptance of innovation in traditional food is strongly dependent on type of product and type of innovation
  - Innovations that provide consumers with relevant benefits without producing substantial changes in the products are generally well accepted
  - Innovations pertaining to novel distribution systems and formats may be less accepted
- Consumers are different within and between countries, segmentation is important

Implications for the industry

- It is important to check out consumers' responses to specific innovations
- It may be important to customise specific products for specific consumer segments
- ..and to communicate and market these products accordingly

Thanks for your attention!

Scientific papers:

Guerrero et al, 2009. Consumer-driven definitiona of TFP and innovation in TFP. Appetite, 52, 2, 345-354

Guerrero et al, 2010. Perception of traditional food products in six European regions using free word assosiation. Food Quality and Preference, 21, 225-233

Pieniak et al, 2009, Association between traditional food consumption and motives for general food choice in six European countries, Appetite, 52, 345-354

Vanhonacker et al, 2010. How do European consumer define the concept of Traditional Food? Evidence from a survey in six European countries, Agribusiness, In Press

Vanhonacker et al, 2010. Profile and projected image of traditional food consumers in Europe, British Food Journal, In Press