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Description of “State of the art” of the theoretical approaches, methods, market and consumer studies already available for the Balkans

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Introduction

The objective of this paper is to explore the common food consumer science field resulting in a description of the “state of the art” and explicitly to identify “missing gaps”. These gaps could refer to theoretical gaps in the existing literature or practical gaps in the organizational structures or applications in the field. To identify gaps, certain knowledge of the current (base) situation is needed: the so called “state of the art”. This reasoning is also the base for the set-up of the conceptual framework for this project. In this context the objective of FOCUS-BALKANS is self-evident: “to improve competencies and understanding in the field of consumer food science in WBC’s”.

This WP1 intends to contribute to this objective by collecting basic data as part of “the State of the Art” and identifying “missing gaps”. WP1 also intends to develop and present a theoretical framework to support the execution of the various WP’s and activities. The objectives of the WP1 (according the Description of work) are:

- To prepare a global overview of consumer and market oriented studies and statistical data in the Balkans, identifying missing gaps and developing a conceptual framework as a basis for this project;
- To integrate the methods and knowledge from the various WP’s into a consistent overall approach - referred to as the conceptual framework.

Two deliverables are foreseen in the WP1 “State of the art”:

- No 1.1. Food consumer sciences: theoretical approaches, methods, markets and consumer studies in the Western Balkan Countries
- No 1.2. Food consumer science conceptual framework – state of the art and exploring the science gap in Western Balkan Countries

This report No. 1.2 is made partly on the basis of the Deliverable no. 1.1, the report of WP2 and contributions from the various work package leaders. This report provides the basis for the design and review of the other work packages; it identifies the theoretical gaps existing in the literature and practical gaps in the field; it provides a conceptual framework linking consumer behaviour towards food and health, nutrition and food safety issues.

- In Chapter 1, the boundaries of the research efforts and dissemination work in this project are described. Some basic definitions are formulated.
- The theory of food consumption and food consumer models are summarised in Chapter 2.
- In Chapter 3 we elaborate on food marketing and data in this area from the Western Balkan countries.
- Research methods to be used in Focus Balkans research WP’s are outlined in Chapter 4.
- The general and theoretical background of these research WP’s 5-8 are shortly described in Chapter 5.
- References are grouped according to the various chapters in Chapter 6.

The report is a rolling paper which will be updated with new data, experiences and information gathered during the remaining two years of the project.

1. Theoretical Background of the Research Field

Over the past decades, scientists have made significant progress in the field of consumer science in general, and food consumer science in particular. The aim of this chapter is to give a short overview of the main achievements in this field.

An important condition for efficient work is to define the area of food consumer science we are dealing with in this project. This area will be circumscribed in this chapter. We will argue that our framework is delimited by the merged fields of consumer science and food market science. Moreover, we will address the issue of missing gaps: how to explore the missing gaps in food consumer sciences in the Western Balkan Countries (WBC)?

An activity of FOCUS-BALKANS is to describe the State of the Art of food consumer science in the WBC's by collecting basic data and identifying missing gaps. And besides that, a diagnosis of the "is" (the present situation) supports the design of the "so" (the future goals/objectives), as for example applied in Hertog et al. (2005). The process is explained in Figure 1.

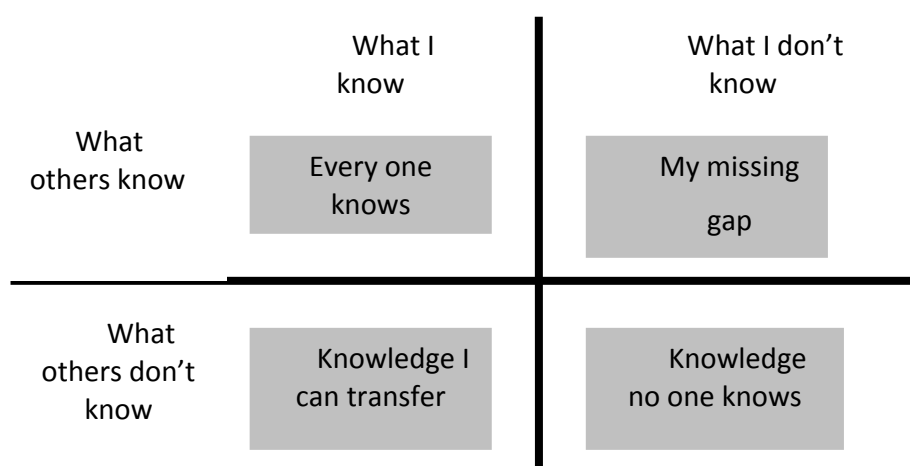


Figure 1 Identifying existing knowledge, knowledge transfer, expertise and missing gaps

The main objectives of this project are to focus on the boxes "knowledge I can transfer" and "my missing gaps" from figure 1. Missing gaps can be identified by making an inventory of the chosen field of interest and compare the measured situation (inventory) with an average situation or a defined optimal situation elsewhere. The areas of interest as formulated in the official WPI description are "consumer research" (attitudes and perceptions), "market situation" and "organizational structures". However, this project, with the different case studies and research results will also contribute to the box "Knowledge no one knows".

1.1. Food Consumer Science in FOCUS-BALKANS

An important condition for efficient work is to define the area of food consumer science we are dealing with in this project. How to circumscribe this area of interest?

Consumer science is a relative young science. Engel et al. (1995) describe the emergence of consumer science in the 1960's, especially the phenomenon of consumer behaviour. They write in the introduction and overview of the book that "no introduction of the field would be complete without an examination of global market segments and strategies". As dominant forces shaping consumer research they note that:

"The analysis of consumer behaviour has its initial roots in economic theory and later in marketing. Its content and methodology are shaped by these essential considerations: (1) the factors that move an economy from being production-driven

to market-driven, and (2) the level of sophistication with which human behaviour is understood in psychology and other behavioural sciences”.

Solomon et al. (2006) state that:

“The field of consumer behaviour is, to us, the study of how the world is influenced by the action of marketers”. “Our understanding of this field goes beyond looking at the act of buying only, but to both having and being as well. Consumer behaviour is much more than buying things; it also embraces the study about having (or not having) things affect our lives, and how our possessions influence the way we feel about ourselves and about each other – our state of being. In addition to understanding why people buy things, we also try to appreciate how products, services and consumption activities contribute to the broader social world we experience. Whether shopping, cooking, cleaning, playing football or hockey, lying on the beach, emailing or texting friends, or even looking at ourselves in the mirror, our lives are touched by the marketing system”.

So they describe the consumers “as actors on the marketplace stage”. They also note that

“The field of consumer science is young, dynamic and in flux. It is constantly being cross-fertilized by perspectives from many different disciplines: every social discipline, plus a few represent the physical sciences and the arts. From this melting pot has come a healthy debate among research perspectives, viewpoints regarding appropriate research methods, and even deeply held beliefs about what are and what are not appropriate issues for consumer researchers to study in the first place”.

The closely related area of marketing research and its methodology is extensively described by various authors, for instance by Churchill and Iacobucci (2005). In all this literature the interaction between consumer and the market is paramount. That is the background for choosing FOCUS-BALKANS pillars: the consumer, the food market and the food processor and producer. Food consumer science cuts across all the three pillars. The consumer will be the main entrance to this project. Food Consumer Sciences aim to explain the interaction of the consumer with the market place, processors and producers. A whole set of disciplines relates to consumer science, like economics, sociology, psychology and marketing. Each of the three pillars (consumer, market and processor/farmers) is connected to some disciplines.

FOCUS-BALKANS deals with the area of food products. Frewer and Van Trijp, eds., (2007) collected articles about the consumers' understanding of food products. Some of these articles deal with organic and functional foods. Since it is not possible in FOCUS-BALKANS to explore all food market segments and products conceivable in all six participating WBC countries, the consortium of the FOCUS- BALKANS made a choice and demarked the subject of research: four product markets were chosen to be central during the project and in the work packages. These markets are [a] the fruit market, [b] products with “health/nutrition” claims, [c] organic products and [d] traditional regional products.

1.2. Scientific Disciplines

Steenkamp (1997) described the role of agricultural and food products in respect to consumer science:

“Food has a central position in the life of consumers. It is the source of nutrition and hedonic experiences, it serves a social and cultural function, and accounts for a major share of consumer expenditure. Yet consumer behaviour with respect to foods has not attracted much systematic attention by consumer behaviour researchers. At least part of the difficulty in conducting research in this important area lies in the complexity and diversity of the influences at work in food choice and consumption, and in the fact that such research requires knowledge of the concepts of and insights from a wide range of science and social science

disciplines, including food science, nutrition, medicine, psychology, psychophysics, sociology, economics, marketing and anthropology”.

This segmentation of consumer science in a variety of disciplines, as described in section 1.1. and by Steenkamp (1997) above, is also the reason why consumer science as a whole does not fit into one model or theory. Consumer science is built up of a variety of disciplines of which each discipline has its own theory and/or model(s). Some of the **theories and models** are listed below in Table 1.

Table 1 Theories and models expressed by discipline related to food consumer science

	Discipline	Theory or model
Food consumer science	Economics	Economic household models
	Food science / nutrition	Bio-psychological approach. Health Belief Model
	Psychology	Theory of Reasoned Action. Theory of Planned Behavior
	Sociology	Food Choice Process Model
	Other knowledge fields:	
	Communication	Theory of linear knowledge transfer or demand driven
	Supply chain management, aspects of corporate social responsibility	

2. Food Consumption models and food choice

This section addresses the topic of food consumer science, more specifically of consumer behaviour relating to food **as main area of focus**. As a starting point, several descriptive models seek to list the factors that influence food choice. These factors can be divided into three categories: [i] product, [ii] person and [iii] environment (or situational context). All these factors can, for example, be found in the studies and models of Kahn (1981), Gains (1996) and Randall and Sanjur (1981). In the model of Randall and Sanjur (1981), these three set of factors are shown to determine specific food preferences (see Figure 1). Each group of factors includes several characteristics.

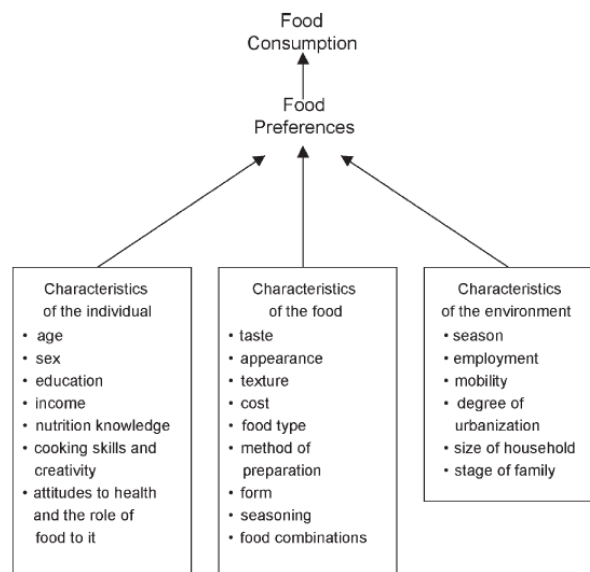


Figure 2 Factors influencing food preferences (Randall and Sanjur, 1981)

It should be noted, however, that the above model identifies factors (a list of variables) rather than causal relationships and remains largely descriptive in nature. Other, more complex models attempt to provide the basis for explaining, predicting and also controlling food choice, by demonstrating causal relationships. These attempts are not confined to one branch of the social sciences. Rather economists, sociologists, anthropologists and psychologists have all made significant contributions.

The rests of this section reviews three of the most influential models:

- economic household model
- food choice process model
- Theory of Reasoned Action / Theory of Planned Behaviour applied to food choice.

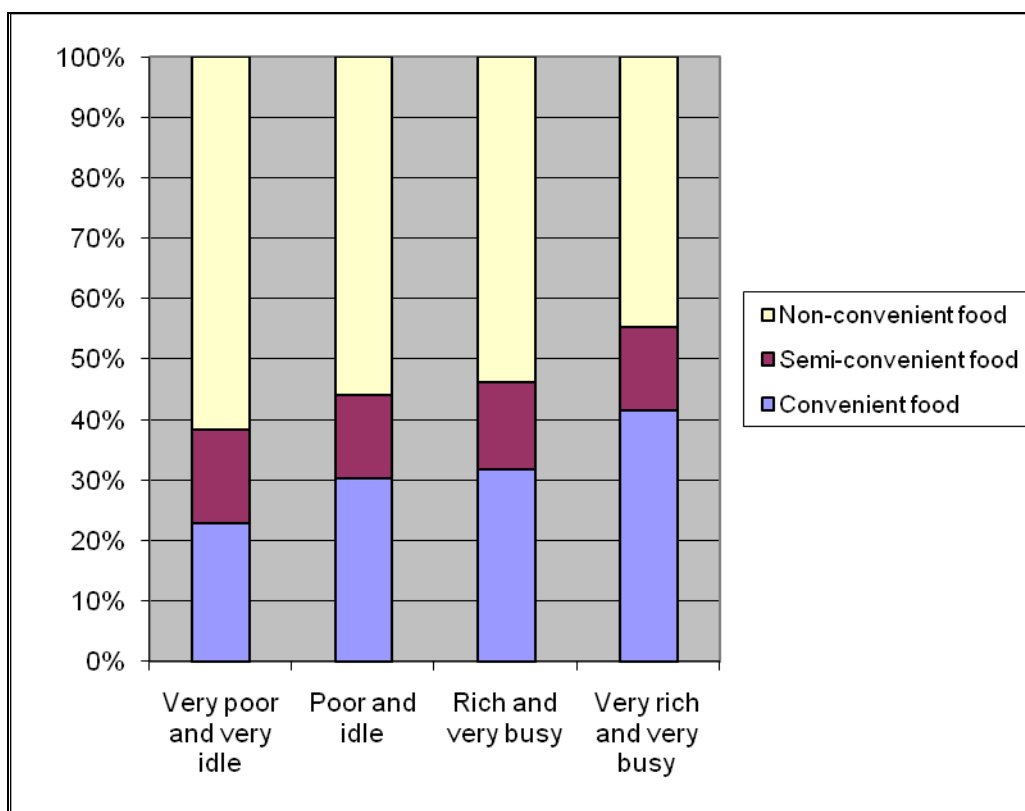
After describing the main features of each model, we evaluate the strengths and weaknesses of each approach.

2.1. Economic Household Model

This approach dates back to the work of Becker (1965), who developed a work - leisure model, where the household is the unit of analysis. He reasoned that households produce utility-yielding commodities (outputs) with combinations of market goods and time. The household can allocate its time to one of three uses: a) labour market time (generates income to acquire market goods), b) household production time (e.g. cooking), and c) consumption time (e.g. eating). In relation to food, meals typically require labour to be

allocated to all three uses: labour market time to generate the income to pay for ingredients, production time to cook the meal and consumption time for eating. The uses of time are however competitive with each other – each additional hour spent at work is one less hour that can be devoted to household production or consumption.

Bonke (1992) utilises Becker's (1965) model to analyse the effects of increases / decreases of income and disposable time on food purchasing behaviour. The former argues that Western societies witnessed in the post-war period rising incomes and an increase in the number of women in the labour market. The rise in women's working hours led to a decrease in the time available to spend on household activities (Grunert et al. 1996). Bonke (1992) argues that households with more money but less time to spend on household activities will substitute non-convenience foods for convenience foods, reducing the time spend on cooking. To test the relationships between disposable time, disposable income and food choice, he draws on cross-sectional data from Denmark. Foods were classified into non-convenience goods (i.e. ingredients used for cooking from scratch), semi-convenience goods (e.g. ready made sauces) and convenience goods (i.e. ready meals, meals eaten out of the home in bars and restaurants). Relative expenditure on the three food categories was assessed in terms of the household's disposable and non disposable time. Households that are both rich and busy were supposed to demand a higher proportion of convenience foods, while those households that are poor with a lot of disposable time would utilise a higher proportion of cheaper, non-convenience foods. Figure 2 presents the results of Bonke's (1992) analysis.



Source: Bonke (1992) and Grunert et al. (1996)

Figure 3 Expenditure on food with different degrees of convenience according to household resources

Figure 2 indicates that, in accordance with Bonke's (1992) hypothesis, busy and rich households allocate a greater proportion of expenditure on convenience food and a smaller proportion on non-convenience foods. The economic household model has been utilised to explain the rise in the number of restaurants and consumption of ready meals during periods of economic growth and the sensitivity in the fortunes of restaurants to changes in income (Schumacher and Boland, 2005). In keeping with Bonke's approach, the current global recession has been associated, in many countries, with a sharp fall in out of home

expenditure on food expenditure and rising interest in 'grow your own' allotments and vegetable plots (Green, 2008). Grunert et al. (1996, p.36) explicate that Bonke's results 'confirm the expectation that consumers act rationally when buying food'.

However the economic household model presents several limitations. For instance while the cross-sectional data from Denmark fit well, Bonke's approach is less able to explain cross-national variations in the consumption of convenience foods. For example, average incomes and labour market participation are higher in Sweden than Spain but the share of food spending accounted for by out of the home meals is significantly higher in the latter country (Swoboda and Morschett, 2001). Ready to cook products for consumption at home (while increasing sales in general in Western Europe) have greater penetration in the USA and the UK compared to France and Italy (Swoboda and Morschett, 2001) – a pattern which cannot be reduced solely to differences in incomes and disposable time. Culture also plays a critical role in explaining cross-national variations in food choice. For instance, to take an extreme example, cross-national variations in the consumption of horsemeat owe little to variations in incomes and disposable time, but rather whether its consumption is culturally sanctioned. Sociologists and anthropologists seek to incorporate a wider set of factors into their explanations of food choice.

2.2. Food Choice Process Model

Furst et al. (1996) developed the food choice process model and it is one of the most influential approaches to be based on grounded theory and derived from qualitative research. There are three main components of the model: the life course, influences and personal systems (Figure 3).

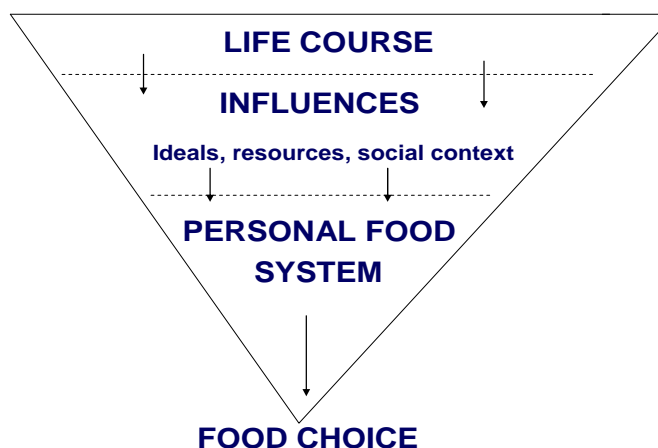


Figure 4 Food Choice Process Model
Source: adapted from Sobal et al. (2006), p.3

The life course refers to past and current eating experiences. Furst et al. (1996) argue that to understand current patterns of food consumption it is necessary to understand trajectories, defined as a 'person's persistent thoughts, feelings, strategies and action over the lifespan (Devine et al. 1998). Furst et al. (1996) argue that trajectories develop in specific situational and historic contexts that become persistent and exhibit their own momentum and continuity. The family unit is seen as the most important situational and historic context, so that a person's upbringing will mould patterns of food consumption long after they have left the parental home. However the authors are careful to avoid crude historical determinism – recognising that researchers should also capture transitions - shifts in a person's life that 'lead to changes or solidify the continuation of behaviours, including food choice patterns' (Sobal

et al. 2006, p.4). For instance, illness may act as a critical transition, disturbing usual personal food systems (Falk et al. 2000).

In Furst et al. 's (1996) model, influences refer to ideals, resources, social framework and the food context. Ideals incorporate symbolic meanings people associate with food, such as social status and whether a particular good is regarded as 'proper food'. The authors note that some people are more 'food centered', deriving pleasure, safety and symbolic value from cooking, while others display low 'food salience':

"I don't make an issue out of having a sit down meal or whatever. . . . I don't think that you have to make like an all out . . . effort to make dinner every day. It doesn't have to be like a main function of your life" (Furst et al. 1996, p.254).

Resources are classified as tangible (money, equipment and space) or intangible (culinary knowledge, skills and time). Both are regarded as important determining factors. The social framework captures the nature of interpersonal relationships, social roles and meaning. Families are regarded by Furst et al. (1996) as the most important set of interpersonal relationships influencing food choice, with individuals 'enacting or being assigned particular household food roles' (Furst et al. 1996, p.255). These roles may conflict with individual preferences, as illustrated in one interview, where she indicated that she placed family needs above her

"if it wasn't for them [the family] I probably wouldn't [cook], probably just have apples or something. . . . I'd probably just be eating one thing . . . I love doing it [preparing food], but yeah, for them it's . . . fun to do and I do it for them, but it's not a priority for me" (Furst et al. 1996, p.255-256).

The third component of the model, the personal food system, relates to mental processes whereby people translate influences on their food choices into how and what they eat in a specific context. This consists of two main components: value negotiations, which involve evaluating the varying merits of different factors, and strategies. Furst et al. (1996) identify six main values pertinent to food choice: sensory perceptions, monetary considerations, convenience, health/nutrition, managing relationships and quality. Strategies capture well-established habits or rules, for example one woman's rule for buying yoghurt was:

". . . there's [a] certain brand of yogurt that my daughter likes . . . I will automatically buy that brand. Because I know if I buy the other brand [cheaper] it will just sit in the refrigerator and rot" (Furst et al. 1996, p.260).

Devine et al. (1998) utilise Furst et al.'s (1996) model to explain patterns of fruit and vegetable consumption. It has also informed studies of the food choice of older consumers (Falk et al. 1996) and newly married couples (Bove et al. 2003).

The food choice process model incorporates a far wider set of factors to explain food choice than the economic households models and it is designed to be comprehensive (Sobal et al. 2006). For instance, the prominence given to life histories is in contrast to the economic models of Becker (1965) and Bonke (1992), where past behaviour and personal health (illness) do not enter as explanatory variables. However, the model is based on a narrow data set – 29 interviews with adults drawn from New York State (USA). Each interview only lasted for 20 to 30 minutes. This appears too short to adequately capture an individual's life course, influences and personal food systems. While the model seeks to be universal, its validity in a cross-national setting has not been explicitly tested. Identifying the specific role played by each component of the model is difficult – as recognised by Sobal et al. (2006, p.2) 'the components of the model...are not mutually exclusive of each other because they overlap and interact'. Establishing causality is thus difficult.

2.3. Theory of Reasoned Action (TRA) / Theory of Planned Behaviour (TPB)

The Theory of Reasoned Action, developed by Ajzen and Fishbein (1980) is premised on the belief that the immediate predictor of behaviour is a behavioural intention. Behavioural intentions depend on a person's attitude toward that behavior and the values of others (Figure 7). Attitudes capture beliefs about behavioural outcomes (behavioural beliefs) combined with an evaluation of the outcomes of such behaviour (outcome evaluation). Subjective norms refer to received social pressures to behave in a certain way and motivation to comply with the wishes of others.

The TRA was not specifically designed to model food choice, but it has been used extensively for this purpose. For instance, McCarthy et al. (2003) use the TRA to model beef consumption in Ireland. They found that both attitudes and subjective norms to be important determinants of behavioural intentions and that behavioural intention correlated significantly with their behaviour measurement. Other studies, applying the TRA to food choice, have also found significant correlations between the main components of the model (Saunders and Rahilly, 1990).

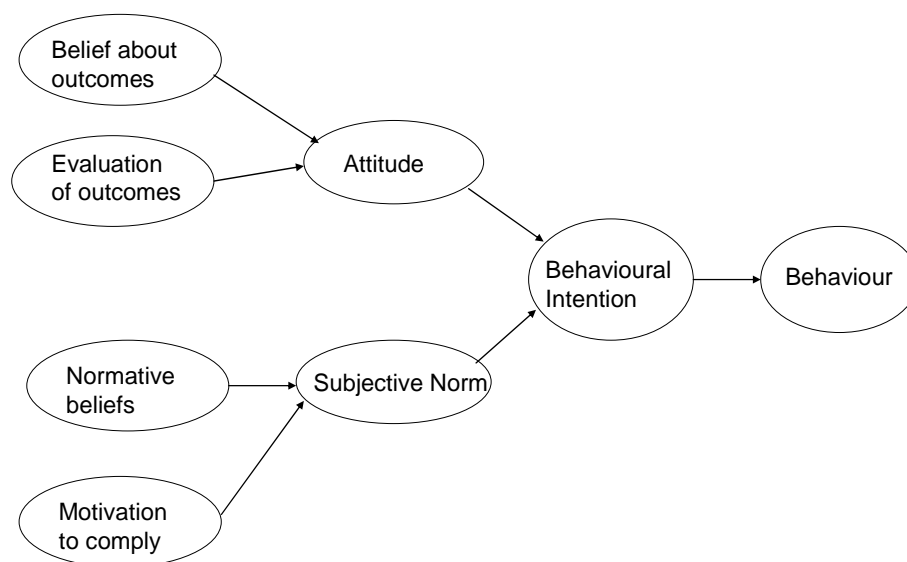


Figure 5 Theory of Reasoned Action (TRA)
Source: adapted from Ajzen and Fishbein, (1980).

However the TRA was developed only to model purely volitional behaviour, in other words cases where successful performance of the behaviour required only the formation of an intention to perform that behaviour (Conner and Armitage, 2006). To address cases of incomplete volitional control, Ajzen (1988) developed the Theory of Planned Behaviour (TPB). The TPB extends the TRA by incorporating an additional construct, perceived behavioural control (PBC), which is regarded as a determinant of both behavioural intentions and behaviour (Figure 8). PBC incorporates both internal control factors (information, skills and abilities) and external control factors (dependence on others / situational factors). Therefore under the TPB, intentions, in turn, are influenced by three major factors:

- Whether the person is in favour of doing the specific behaviour (attitude toward the behaviour),
- How much the person feels social pressure to do it (subjective norm),
- Whether the person feels in control of the action in question or self-efficacy in relation to the behaviour (perceived behavioural control).

It should be noted that the TPB still represents a “reasoned action” approach to consumer behaviour because it assumes that intentions and behaviour in this domain follow reasonably from the behavioural, normative, and control beliefs people hold about the behaviour. Although the beliefs people hold may be unfounded, inaccurate, or even irrational, the attitudes, subjective norms, and perceptions of behavioural control are thought to follow spontaneously and reasonably from these beliefs, produce a corresponding behavioural intention, and ultimately result in behavior that is consistent with the overall tenor of the beliefs. So by this theory, as general rule, it is assumed that attitudes toward available options, which can be measured directly, are determinants of consumer decisions (Ajzen, 2008).

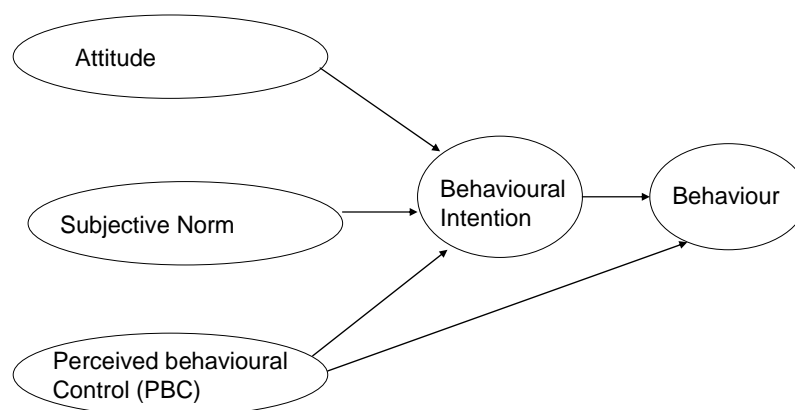


Figure 6 Theory of Reasoned Action (TRA)
Source: adapted from Ajzen and Fishbein, (1980).

The TPB has become the most widely adopted theoretical framework for modelling food choice (Conner and Armitage, 2006). For instance, Cox et al. (1998) and Nguyen et al. (1996) employ the TPB to explain variations in fruit and vegetable and fat consumption respectively. The TPB in Cox et al.'s (1998) study of fruit and vegetable consumption accounted for between 33 and 47 per cent of the variation in behavioural intentions. Attitudes, subjective norms and PBC were all significant, with attitudes the most important predictor. Nguyen et al. (1996) also found all three components to be significant; with attitudes the most important factor in explaining intentions to eat fatty foods. Further studies (Povey et al. 2000) on fruit and vegetable consumption have found a significant linkage between behavioural intentions and actual behaviour. However the TPB model works best for behaviour that is very specifically defined and when there is a shorter time period between intention and behaviour. Behavioural intentions may be a poor predictor of behaviour in cases of addiction (e.g. intention to quit smoking).

To improve the proportion of variation explained in intentions and behaviour, several extensions to the TPB have been proposed. Two additional variables commonly included are self-identity and perceived need (Conner and Armitage, 2006). Self-identity refers to the relatively enduring characteristics that people ascribe to themselves (Sparks, 2000). In food choice, individuals may be more likely to eat healthily if they perceive themselves as ‘health conscious’ or eat environmentally friendly foods, such as organics, if they identify themselves

as 'green consumers'. The latter notion was tested by Sparks and Shepherd (1992) who found that self identity did significantly contribute to explaining intentions to consume organic vegetables, in addition to other components of the TPB model. A meta-analysis by Conner and Armitage (1998) suggests, however, that self-identity's contribution to the explanation of variations in behavioural intentions may be rather limited, certainly accounting for less than the 'traditional' components of the TPB.

Perceived need represents a second modification to the TPB, incorporated by Paisley and Sparks (1998). The latter argue that while the TPB may capture attitudes it does not in itself assess whether individuals perceive a need for such behaviour. For example, an individual may regard a low fat diet in general to be positive but not perceive it to be necessary on a personal basis. Studies which have incorporated perceived need have found that it adds significantly to the prediction of behavioural intentions (Paisley and Sparks, 1998; Povey et al. 2000).

Attitude – intention relationships are likely to be weaker where individuals possess attitudinal ambivalence – simultaneously holding both positive and negative attitudes toward an object. Regarding food choice, for instance an individual may hold both positive and negative attitudes to junk food, liking the taste but disliking the high fat content. Conner and Armitage (2006, p.52) argue that attitudinal ambivalence is likely to moderate the relationship between attitudes and intention/behaviour 'such that stronger (i.e. less ambivalent) attitudes are more predictive'. Sparks et al. (2001) found some empirical support for this proposition in studies focusing on eating meat and chocolate.

While researchers agree on the importance of attitudes in shaping behaviour it is important to note that the model does not explain how attitudes are created or modified. The latter is particularly important for food agencies and commercial practitioners that wish to change behaviour. It may be that the formation of attitudes and their modification can only be explained in relation to the notions of the life course, trajectories and transitions, introduced by Furst et al. (1996). Incorporating this into TPB modelling would, however, require a very different research design.

In assuming that food choice relates to 'reasoned action', the TRA/TPB may struggle to explain impulse behavior. Impulse purchases are very important in several food markets e.g. confectionery. One model which tries to pay more attention to impulse and unconscious buying is the 'Purchase cube' - model of spontaneous purchase vs. planned purchase developed by Baumgartner. The model is shown in Figure 7. Using multidimensional scaling and cluster analysis he distinguished eight distinct forms of purchase behaviour. These eight purchase types are based on three underlying dimensions: thinking versus feelings purchases (based on functional vs. psychosocial purchase motivation), low versus high purchase involvement (based on the degree of care required by a purchase or the amount of effort expended on the purchase), and spontaneous versus deliberate purchase behavior (based on how much prior planning goes into the purchase and how much previous experience the consumer has with the purchase) (Baumgartner, 2002).

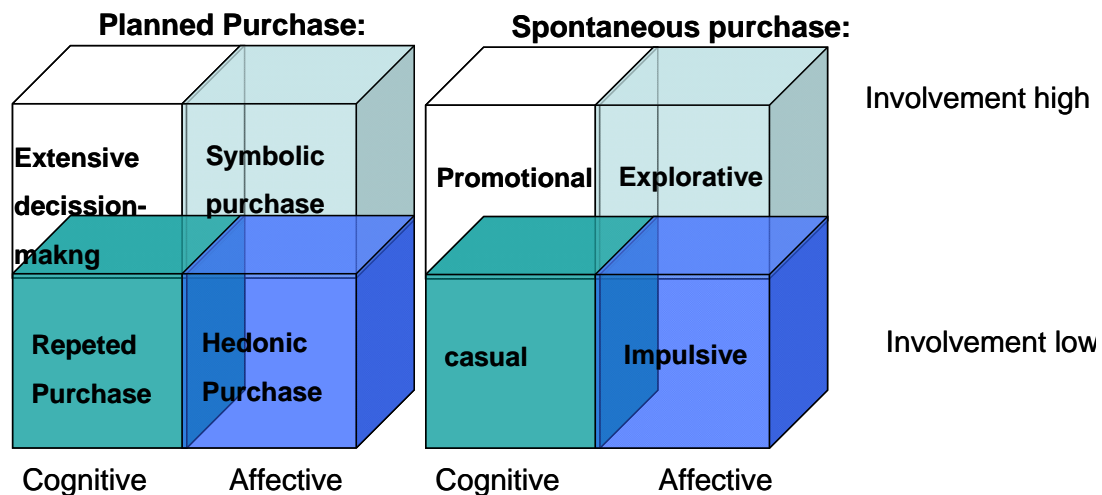


Figure 7 The purchase cube: Three-dimensional typology of purchase behaviours

2.4. Conclusions regarding Food Choice Models

This section reviews the literature on food choice, identifying three streams of research coalescing around the economic household model, food choice process model and applications of the TRA/TPB. These remain rather separate literatures with often little interaction between economists, sociologists and psychologists. This means that criticisms of one approach often remain unanswered and unaddressed by another.

From reviewing the models a number of conclusions can be drawn. First, explanations of cross-national variations in food choice cannot be solely reduced to differences in incomes. Culture plays an important part in explaining cross-national variations but researchers have often struggled to capture this in their models. Second, past behaviour remains a consistent predictor of current behaviour. This is captured by Furst et al. (1996) in their notion of the life course and trajectories. Studies by social psychologists have found 'past behaviour predicts subsequent behaviour, over and above the effects of TPB variables' (Conner and Armitage, 2008, p.41). Given the strong linkage between past and current behaviour, studies of food choice should incorporate a historical dimension. Finally, while several studies applying the TPB to food choice indicate the significance of the main elements of the model and its overall validity, deep understanding requires also a consideration of how attitudes are generated and also altered.

Ostergaard and Jantzen (2001) note that food consumption research, and more largely, consumption studies mostly explored consumption within the frames of individual behaviour. They note that there has been a lack of consideration for the role played by groups or by the public sphere in looking at the formation of identity and consciousness of consumer preferences. They propose to shift the perspective by looking at consuming individuals more than at consumers, by giving a greater attention to the meaning of their choices. Indeed, interactions between individuals and the society must be looked at in order to explain the evolution of markets.

3. Marketing

3.1. Theoretical economic approaches of the consumer

In the classical economic approaches, the pure and perfect competition is the main paradigm. In this approach, market is seen as a meeting between offer and demand. Offer is driven by the producer side, while demand is driven by the consumer side. So, consumer is basically seen as major driving force of the market, its power is equal to the one of the producer, and the equilibrium is given under perfect information conditions on price, quality and quantity to both sides. The costs of adjustment between producers and consumers is not calculated and do not depend of market size or physical arrangement. The use of this theory can lead to elaboration of models which help to predict price at equilibrium under assumptions of quantity, for example. Quality is not seen as major component of the equilibrium, it is an objective element which is known by all the agents.

From the point of view of the *Neoclassical Economics*, several authors have highlighted how market failure may arise from information asymmetry between the producer/seller and the consumer/buyer. Akerlof (1970) studied the link between quality and uncertainty. His approach to uncertainty is based on the assumption that, in certain context of trade, as second-hand cars, uncertainty is inherent to the nature of the transaction itself. Asymmetry of information about products is essentially linked to 1) experience goods (Nelson, 1970), for which the quality, especially the sensory quality, can be assessed by the consumer only when he really consumes the product, and 2) trust goods (Darby and Karni, 1973), sometimes known as credence goods, for which quality can never be assessed by the consumer himself (production methods or nutrition content for example). Shapiro (1983) demonstrates that premium prices are not in contradiction with the general welfare theory, because they are necessary to cover reputation costs (certification and control costs can also be added to it), in which any firm has to invest in order to gain consumers' trust.

Market failure challenges the hypotheses of the optimal adjustment of the price under the influence of the confrontation of supply and demand. Because of the risk of deception with respect to quality and the absence of palliative rules, the competition and thus the differentiation between the producers focuses on the costs, the margins and the presentation of the products. This leads inevitably to a general decrease in product quality. Consequently, the consumer might become trapped in a downward spiral of deception and continuously weakening quality references. On the other hand, preferences may be less stable than it is often postulated in theoretical models of consumer decision-making. Recent analysis showed that the values of safety, nutrition, taste and price were among the most important to consumers (Lusk and Briggeman, 2009).

Consequently, *the Economics of Food Safety* has to be included into theoretical framework of contemporary food consumer behavior analysis. Food safety includes answering on following questions: how farmers produce food (what chemicals they use when growing plants and how they feed their animals), how food is processed, how it is sold *and what sort of information is provided on the product labeling*. From the traditional point of view food labeling was assumed only as the way to provide information to the consumer. Contemporary approach suggests that it is the way to convey information regarding all relevant products quality attributes. So labeling would provide consumers with informed choices. Furthermore, from the public authority's point of view, informed choices will lead to public health benefits. Analysis of food safety can be overviewed from the demand, supply and market equilibrium point of view. Having in mind these project goals, the most important are models for food safety analysis from the demand point of view (Carriquiry, Jensen and Nusser, 1991; Choi and Jensen, 1991; Falconi and Roe, 1991; Eom 1995; Weaver 1995, Van Ravenswaay and Hoehn 1996, Antle 2001). Other aspects are more explored in the chapter named Products with health claims – state of the art based on the literature. These analyses suggest that when a food poses a health risk recognized by the consumer, the quantity of food demanded is less than in the no-risk solution. Food with health claims, instead of negative, poses a positive property - expected marginal health benefit. If perceived marginal health benefit is higher, the higher is the demand for the food with health claim.

To conclude, the neoclassical view is that consumers make choices based on their preferences. A critical underlying assumption in this framework is that preferences are complete and stable. But choice may not be as stable as stated by this theory. People use trial-and-error learning to “discover” preferences. More recently they are affected by the lack of the relevant information for decision making (*Information Economics*). Instead of preferences people are led by values as “underlying preferences” defined over fundamental aspects of life (e.g. health, prestige, sensual pleasure and other). It is usual for consumers to demand information, which enables them to make informed choices. The economic theories used for understanding contemporary consumer food choice, as listed in Table 2.

Table 2 Review of the economic theories applied in Food Consumer Science

ECONOMICS OF INFORMATON	INSTITUTIONAL ECONOMICS
Consumer behavior is determined by individual income, preferences/expectations and the goods available along with their prices.	Consumer cannot assess service quality, or can assess it at high cost (effects are not fully verified).
The prices of (heterogeneous) goods don't include all relevant information for the consumer.	Human-made institutions have to interrupt with intervention in shaping economic behavior.
Market failure leads to the inefficient consumer behavior.	Inefficient behavior of all players at the market – consumers, producers, regulators...
Result: consumer is aware of his needs and he believes that some (experience or credence) goods might give him satisfaction.	Result: Economics cannot be separated from the political and social system (Heterodox Institutional Economics, New Institutional Economics, Lows and Economics and Behavioral Economics).
“THE ECONOMICS OF CONSUMER PROTECTION IS THE ECONOMICS OF INFORMATION”. (SHAPIRO)	INFLUENCE OF FORMAL AS WELL AS INFORMAL INSTITUTIONS ON CONSUMER BEHAVIOR IS IMPORTANT.

Source: Z. Stojanovic (2009): Nutrition and Health Claims from the Economic Perspective - Application of the economic theories and models, FOCUS-BALKANS Training 3, Becici, October 2009.

At the end, it is of extremely importance to accept the fact that exploring the market situation is based on the overall idea that markets: (1) consist of a variety of actors and (2) exist in a given environment. Recently, the economists often suggest institutional framework as the basis for the research of consumer behaviour (*Institutional Economics – e.g. Heterodox Institutional Economics, New Institutional Economics, Lows and Economics, Behavioural Economics*). To illustrate this: farmers are linked to processors, retailers and at the end to consumers (and *vice versa*). In order to remain licensed to operate (to survive) the environment should not be neglected and should be watched carefully. To deal with this we talk these days about concepts as a “license to produce” and about “firms’ social responsibility”. The goodness of fit between different segments in a supply chain concerning the adoption of social responsible concepts is, for instance, analysed by Verhees et al. (2008). Role of different players at the market have to be analyzed in the context of understanding of contemporary food consumer behaviour. It includes consumers associations, producers, retailers (economic sector), regulatory institutions and governmental bodies in the area of public health, food system, trade, innovations and technology, education and information.

As regards products with nutrition and health claims, consumer research is specifically directed into how consumers' process information and how those information provided on food packaging and in food advertising may affect their attitudes and purchase intention. The explanation of the relevance of the theories for consumer studies related to products with health and nutrition claims may be found in the fact that the claim makes and important feature of the product itself. The product packaging communicates the message – the claim which expresses basic product benefits. Therefore, a number of studies related to food

consumer research of products with nutrition and health claims (eg. Nayga, Lipinski and Savur, 1998; Garretson and Burton, 2000; Kim and Zheng, 2009) use a set of information processing/consumer learning and attitude formation and change theories as the most reliable theoretical framework. The theories and their brief explanations are listed in the following table:

Table 3 Information processing/learning and attitude formation and change theories used as a theoretical framework in food consumer research

Theory	Explanation
Economic model of search for information	Grounded in the economy of scarce resources and opportunity costs. Consumers will search for information until additional benefits from acquiring new information overcome or become equal to the additional costs they have to make related to the information search.
Elaboration likelihood model	Consumer involvement theory which explains that different product categories are connected with different perceived consumer risks. Used for defining alternative ways of persuasion. The basic premise is that in high involvement condition persuasion should go through the central route (since consumers are ready to activate cognitive thinking) while in low involvement condition persuasion follows peripheral route (by activating consumers affects rather than cognitions)
Expectancy value theory	Explains how attitudes toward an object or an action are developed based on assessments of beliefs and values. An attitude is a function of a belief and its value to an individual. The model has three main components: 1) response to information through developing a belief, 2) assigning value to each attribute the belief is based on and 3) an expectation is created or modified based on result of calculation of beliefs and values.
Dual mediation hypothesis	This model examines structural relationship between three constructs: Attitude toward ad (Aad), Attitude toward brand (Ab) and Purchase intention (PI). The three constructs are most frequently used for measuring communications effectiveness.

All listed theories may serve as a sound theoretical framework in food consumer studies. For example, *Economic model of search for information* may be used as a relevant background for analyzing use of particular claims and disclaimers on food products and its effects on the enhancement of consumers' knowledge. Analysis may address the issue of the search for information among various consumer groups (eg. according to gender, age, employment status, education etc). As regards the *Elaboration likelihood model* its applicability is derived from the fact that consumers may be more or less involved in search of information and thus decide to use cognitive thinking, logic and objective arguments or simply follow the peripheral route thus making their decisions upon affective reactions. Different food categories and different claims may evoke rather different consumer involvement since not all of them may be perceived equally important. Perceived diagnosticity of specific claims may be explained by calling upon the *prospect theory* (explaining that a value associated with a potential loss is greater or more salient than a value associated with potential gain). On the other hand, *Expectancy value theory* may be used to explain how certain claims may affect product/brand evaluations and how effective these may be in initiating product trial and repeated purchases. The theory explains that information congruent with consumers' expectations may serve a better purpose in persuading them to try the products. Contrary to this, however, *schema congruity theory* advises that discretely incongruent information (claims) may increase consumers' attention and interest. Finally, in consumer studies related to products with N&H claims we may apply

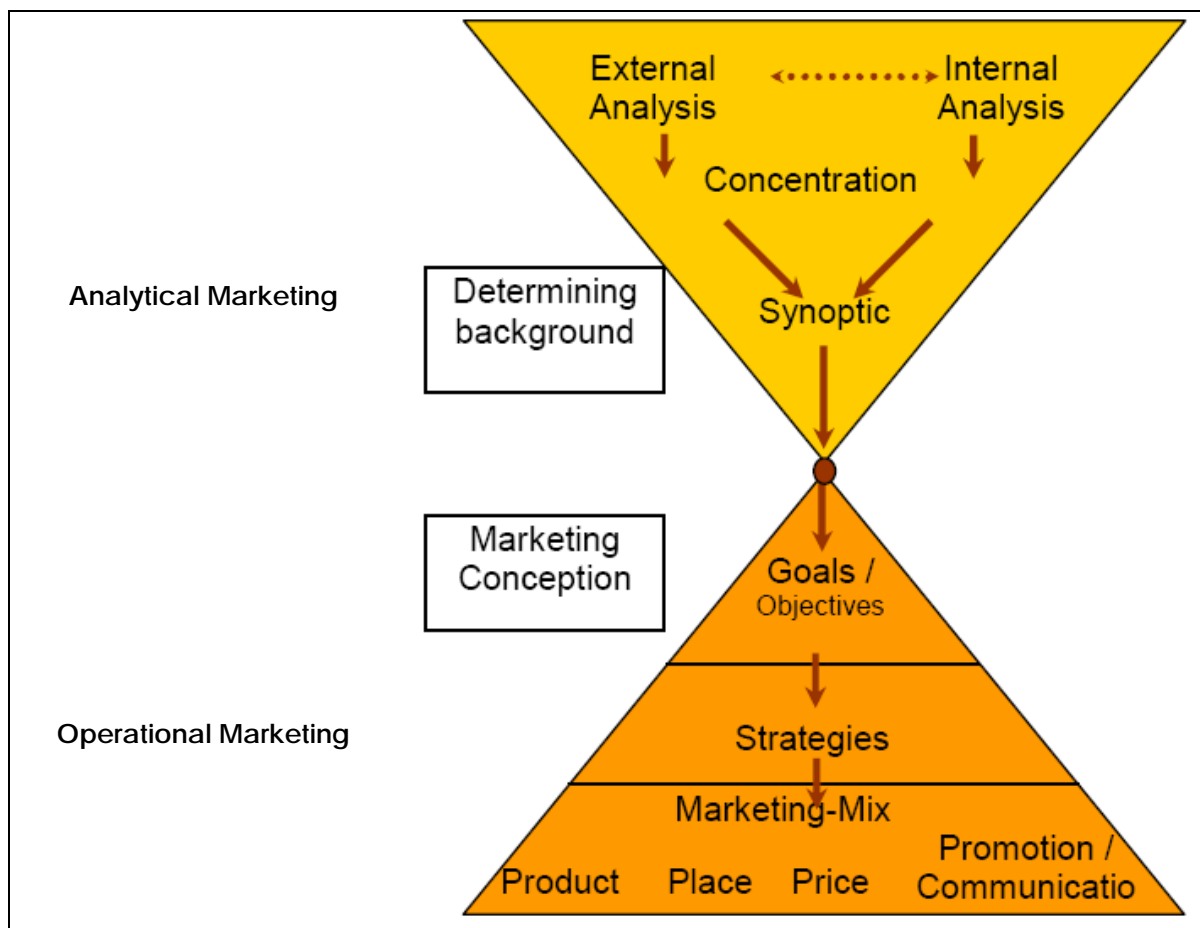
Dual Mediation Hypothesis (DMH) when analyzing how the attitude toward an ad (or an attitude toward the claim) affects attitude toward the brand and purchase intention. The model may also be combined with elaboration likelihood model in which case we can understand the difference between DMH and alternative affect transfer hypothesis. If the information processing goes via the central route, the attitude toward the ad is affected by ad cognitions (thinking), it affects brand cognitions (thinking) and further both directly and indirectly attitude toward the brand and purchase intention, which is the basic premise of DMH. On the other hand, if the information processing goes via the peripheral route, the affect toward the ad (claim) has a direct impact on attitude toward the brand and purchase intention, which is the idea of ATH.

3.2. Food marketing and marketing management theories

Food Marketing is a sub-discipline of marketing. The concept of marketing as a systematic approach to analyse, understand and to act on markets takes its roots in in the agro-food business of the United States in the 1920s. At this time, US agriculture passed a severe crisis that led an important number of farmers to giving up on their activity and to a migration of the rural areas, foremost in the mid-west. Agricultural research institutes, analyzing the underlying reasons of the crisis, hit upon the crucial role of the relationship between farmers and their markets. Describing and de-composing of the exchange-relationships led to first elements of what later became "marketing" as an entrepreneurial concept and a scientific discipline (Ritson, 1997, S.11).

Though designed in an agricultural and food context, the high potential of the new conception was at first understood and integrated by other branches of industry and services, where the application of "marketing" was a major factor for innovation and re-structuring from the late 1950s onwards. Paradoxically, the agro-food business and agriculture itself were among the last sectors to actively take up the ideas of marketing (Bartels, 1962).

The central idea of marketing as a theoretical conception tries to describe and to understand any enterprise from a point of view that is situated outside of the enterprise, in its (actual or potential) market. Any strategic or operational decision-making and action is based on the analysis of information about the enterprises market (Kotler, 1992, Becker, 1998).



Source: Becker (1998, p.4) Schaer (2001, p. 53), changed and adapted

Figure 8 : The different levels of Marketing

The main stages of marketing work are shown in the figure above:

- Strategic marketing: analysis of market and environment, fixation of objectives and strategies
- Operational marketing: the realisation of strategies by means of application of the four policies: price, product, distribution and public relation/communication/promotion.

It is at the stage of analysis of the enterprise and its environment; where market research and consumer research intervene.

In management sciences, strategy is the result of the ability to take decisions in relation to the stakes of the context, in coherence with a vision of the goals to be reached. The strategic capacity is related to the classical axes of the marketing management: product, price, place and promotion (Kotler, 1967).

Product differentiation is a classical strategy in the economic value creation process, well-known in marketing theories (Porter, 1985), which main interest is the price setting at a market equilibrium moved from the initial market to a niche market because the product has a specific and unique quality which makes it different from the standard product (Chamberlin, 1933).

These aspects apply to food as well as to the other kind of products. In the case of food, the quality assessment has some particularities. In effect, food quality can refer to physical characteristics as well as to characteristics related to the production processes. This is not only the case for food, and the development of the "fair trade" programmes of labelling prove that the sensibility of some segments of consumers go into a broader conception of citizen consumption, but it is especially developed in the food consumption.

The characteristics which are linked to the process of production can be known more or less precisely at the moment of the transaction. The consumer preference varies according to the combination between all kind of characteristics and prices, as well as to the willingness to pay a premium for this product instead of for another with a different combination quality/price. The nutrition content, the freshness, the colour and general aspect of a food product are the main physical characteristics known at the moment of the transaction. The taste and the rheological characteristics are mostly unknown at the moment of the transaction. Related to the process of production, both the region of origin (at least the country of origin) and the way of production (organic, integrated production, etc.) are mostly known at the moment of the purchase. Consumer trust towards the product and the process of production can usually be enhanced by diverse certificates of guarantee.

On the food market, among others, three dimensions of the differentiation strategy based on such kind of qualities (which cannot be appreciated directly by consumers at the point of sale) have been studied in detail and reported in literature: organic products, ethical products and regional food. In fact, all these three kinds of qualities are more related to the method of production rather than directly to the price, appearance or taste of the product.

At a theoretical level, the social construction of economic values linked to qualities (physical characteristics and linked to the processes) which can differentiate the product is to be distinguished from the value added itself. Making a distinction between these two notions leads to a better understanding of the effect of product differentiation.

- Value added is a concept developed in macro-economy. It refers to the additional value of a commodity over the cost of commodities used to produce it from the previous stage of production. The value added corresponds to the remuneration of the factors of production, which are the work, the capital and the risks.
- Economic value is a broader concept. It is obtained at the moment of the transaction, and it remunerates beyond the factors of the physical production also some additional characteristics, for example the image or reputation acquired in the course of time. The social construction of the qualities and the intellectual property rights are the two main facilitators of the generation of economic values at producer level. Without intellectual property rights, efforts of the producers/sellers are reduced to null through similar or even sometimes deceptive assertions (parasitism) of competitors willing to benefit without due cause from the qualitative efforts made.

Sensibility of the consumers is going nowadays in several directions. FOCUS-BALKANS focuses on four specific directions, which have been chosen among many due to their particular interest for scientists over the past decades: the fruit consumption, closely related to the health concerns due to the importance of the fruit and vegetable intake in the healthy diet, the products with health claims, which have also close links with the consumers preoccupations of their health, the organic products, which also relate to the health and environmental and ethical concerns, and finally the traditional food, which is linked to the food habits and historical intake, to the cultural heritage and the traditional knowledge.

3.3. Operational food marketing: the strategies of actors in the WBC

At the base of exploring the market situation for selected products is the idea that markets consist of a variety of actors and exist in a given environment. To illustrate this: farmers are linked to processors, retailers and in the end consumers (and vice versa). In order to remain licensed to operate (to survive) the environment should not be neglected and should be watched carefully.

Shopping behaviour of consumers and their habits depend on numerous factors: degree of development of the country, presence of various sales chains, but also culture and tradition of the country and consumers. Shape of shopping behaviour varies from country to country, but also „levelling” of consumer characteristics is noticeable. Globalization affects presence of global brands, presence of global sales chains, as well as global campaigns (lesser and lesser adjusted to local consumer). All this forms a typical consumer in all WBC. On a personal

level, shopping habits are determined by demographic variables: age, education, income, gender, place of residence. All these categories also determine lifestyle of an individual, so form of shopping behaviour is an important characteristic of life style.

The food habits have changed over the last several years, and the consumers in WBC have become more and more sophisticated and demanding. Despite the increase of production, the domestic food industry is still incapable of meeting the market requests, especially when it comes to innovative or well-processed products.

3.3.1. Market structures

In economics, market structure (also known as market form) describes the state of a market with respect to competition. The elements of market structure include the number and size distribution of firms, entry conditions, and the extent of differentiation.

The current situation is much influenced by the centrally planned economies legacy. In the socialist era, the supply chains relied mostly on state companies that produced and processed food (Agrokombinats) and retail chains that distributed it. Marginal quantities were produced by small-scale farmers and sold on green market through informal channels, but generally speaking the supply chains were significantly vertically integrated. The reforms implemented since the mid-nineties, have resulted in the privatisation of these structures and in the opening of the market to other companies (foreign and domestic).

Few domestic companies have been able to acquire the former state retail networks that allow them to have national coverage, and kombinats for fresh and processed food production. In this way some big conglomerates for ex. Delta Holding in Serbia or Agrokor in Croatia – have somehow reproduced at national level the vertically integrated models that existed in the former Yugoslavia. After consolidating their position in their country, these giants in Balkan term, have now regional strategies developing retail networks in Montenegro and Bosnia and Herzegovina for Delta Holding, and in Serbia, Macedonia and Bosnia and Herzegovina for Agrokor. Other examples of such ¹²vertically integrated supply chains exist, for meat products for instance.

Other retail chains have appeared since the late nineties. Among them, the Slovenian Mercator has open supermarket and hypermarkets in all WBC. Others, German, Greek, British, Italian, Austrian, French and Turkish companies have so far established only on some of the countries, but often fail to scale-up their operation after opening few supermarkets in the main urban centres.

The excessive vertical integration and some groups leading position in certain countries result in margins that are almost three times the normal.

The retail network in Croatia, Serbia and BIH and other WBC is still well developed, being dominated by small shops (under 100 sq m). The largest share in the retail market in WBC is still held by small shops, that belongs to the network of the big retailers, or that are managed by individual entrepreneurs. In addition, green markets are still widely spread in the WBC, with exception of Slovenia. In the other WBC, green markets are present in each town and cities' district.

3.3.2. Consumption of food and shopping behaviour

The types of locations where consumers purchase food have changed over the past years following changes in lifestyle (e.g. working habits) and in offer from the retail sector. The fast increase of the number of super- and hypermarket resulted in a steady grow of their market share. Preferences for supermarket are higher among younger people and people with higher education. The second most popular type of store is the mini-market; however the share is slightly declining. Large retail establishments figure more and more prominently due

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² V. Ménez First version of the report, J.Malcolm, Agro economic policy analysis of the new member states, the candidate states and the countries of the western Balkans, May 2006

to changes in the way of living and new customer needs. The latest development trend is moving in the direction of construction of modern shopping centres that provide different shopping services and entertainment in one place. They recreate the street ambiance with its bars, restaurants, kiosk and children playground and become privileged places for socialising.

Data of survey performed in some WBC by IPSOS Strategic Puls related to shopping habits are presented below.³

In **Croatia** women go shopping more frequently than men do. Male citizens, who have higher living standard, go for small everyday shopping more rarely. In a small typical shopping occasion, 7 to 11 € are usually spent. The most important criteria for small shopping occasions are vicinity of POS (Point Of Sale), favorable prices and quality of products. All other reasons are less important (like the speed of cash register operators, freshness of products, cleanliness of POS, kindness of staff, close relationship with staff, wide range of various kinds of products). Big shopping occasions when food and other groceries for the household are bought happen usually once a month, and then 2 – 3 times a month. During one big shopping occasion in Croatia (in the year 2008) citizens usually spend 55 € to 68 €. The most important criteria for selection of POS are favorable prices and product quality. So it is quite expected that vicinity of POS is the most important for small shopping occasions, and that price is the most important for big shopping occasions. Of course, no one neglects quality of food as a very important indicator, but surely price is more important for big shopping.

In **Serbia** mini markets are the most frequently visited places for daily small shopping. Where do consumers shop? Places visited daily, where consumers spend less than 12 € are bakeries, small shops with one cash register, green market and kiosks. Consumers in Serbia go for small shopping to the nearest shops, buying everyday product categories, with a shorter shelf life. When the spent sum is bigger than 12 €, consumers go also to hypermarkets, and then in supermarkets. Sometimes, big shopping is also done in small shops. Expectedly, men rather go to liquor discount stores, and women to drugstores. Also expectedly, in non-urban municipalities, consumers visit supermarkets and bigger self-service less, especially for everyday purchase, since there are a lesser number of them in those areas. Frequency of small and big shopping: small shopping is usually done 4 - 6 times a week, while big shopping is usually done once a week or 2 - 3 times a month. When making a decision where to go shopping, vicinity of shop plays crucial role when everyday shopping is concerned. Then follow prices, and then quality of products. All other criteria are less important (politeness, variety of offer, security and sanitary conditions). In the fast way of living, when a modern man in Serbia is exposed to various responsibilities, it is natural that vicinity, rather than price, affects decision about shopping, especially when behaviour of consumers who live in Belgrade is concerned. Politeness of staff is more important for older consumers, while they value less: working hours, special offers and promotions. Working hours are less of a determining factor in case of older consumers who live in Belgrade (their lifestyle is characterized with certain temperateness and relaxation). It seems that the biggest difference in shopping habits is conditioned by place of residence. All other demographic variables (gender, age, even income) don't have the same influence as place of residence does. Consumers with higher income shop significantly less in small shops with one cash register, so we may assume that the richest people go for big shopping most, they do it more rarely, but they buy bigger quantities of products necessary for a household. Consumers' confidence in quality and safety of products like meat, fruit, vegetables, bread and baked goods is far bigger in case of products sold in big chains and supermarkets, than in small shops that are not a part of any chain. This may be explained with bigger turnover, which necessarily leads to better quality of products.

A typical shopping habit in **BIH** does not differ much, than in other mentioned countries. In supermarkets people buy products with late date of expiration (can milk, tin can and dehydrated food), at city market they buy fresh fruit and vegetable and meat is bought in butchers'. The expansion of supermarkets will change these habits, especially if they are opened in the vicinity of the consumers. Even though the city markets and butcher shops will not disappear, more and more shoppers are going to buy meat, fruit and vegetable in the supermarkets. Therefore, it is expected that the supermarkets might want to invest more in these supplies so as to appeal to new clients. Retail sales sector in BiH keeps transforming, since the supermarkets are slowly pushing grocery shops out of the market.

Citizens of Bosnia and Herzegovina go to a small shopping mainly once a day (26% of population aged 15 to 64 years, daily goes to small shopping). Vicinity of shop is, like in other countries in the region, the most important criterion for choice of small shop for everyday shopping (vicinity of the shop

³ Brand Puls data from IPSOS Strategic Puls, year 2008, national representative sample 4000 – 2000 respondents depending on a country, 15-64 years old target group

occupies the first place, and it is followed by the following most important criteria: quality of products, favorable prices of products, and freshness of products). Most frequently the amount spent in small shop ranges between 4 € and 7 € (a total of 38% the citizens spend this amount on the average). Once a month citizens of BIH go to big shopping in hypermarkets or supermarkets (a total of 45% of the citizens go to a big shopping once a month). They mainly spend from 40 to 50 € within big shopping. The most important criterion for purchase in large shopping chains is favourability of prices, and the second most important criterion is quality of products.

Comparable data for Slovenia, Macedonia and Montenegro are not available, rendering the description of their situation not possible.

Various attitudes related to purchasing habits in WBC are also interesting and valuable as information for this project.

In **Croatia** with the statement that they like to buy things which they like even if they have to lend money, majority of citizens of Croatia don't agree (73.6%). So, citizens of Croatia don't tend to spend money that they don't have, i.e. that they haven't earned. Croatian population is characterized by caution when trying out new things, since majority agrees with the statement that they give advantage to brands that they know well (56%). In general, consumers in the Western Balkans are loyal, i.e. committed to known brands. They don't like to experiment, i.e. buy unknown brands (48%). Completely in accordance with the previously stated, they give advantage to products with lower price (31% agree with this statement).

Population of Croatia prefers domestic over foreign products; citizens of Croatia don't think about calories while they eat (even 62% never think of calories); 40% think that fast food is unhealthy; they don't practice sports or recreation (47%); although 50% of the population say that they have no health problems and that they don't have to pay attention to their nutrition. The fact that care for one's body and health is not on a high level, is also supported by the data that 66% of the people say how they visit the doctor only when they are very sick. 36% of the population doesn't agree with the statement that they avoid fatty and fast food.

In Croatia, the same as in other Western Balkan countries, people cook a lot. About one third of people agree with the statement that they enjoy cooking (also equal number disagrees with the same statement). So, the habit to cook food is rather influenced by demographic characteristics: expectedly, women enjoy cooking more than men do. Statements which illustrate this are the following: 73% of the population doesn't agree with the statement that they prepare ready meals most frequently; 51% of the population says that there is enough time for cooking and preparing food.

Only 31% of the population agrees with the statement that they are ready to pay more for food without additives, while 35% don't agree with this statement. 47% of the population doesn't read labels on products, which points to insufficient interest in and education in the domain of nutrition and food products. These data are surely concerning, since they point to insufficiently developed awareness of importance of healthy nutrition and care for one's own body and health.

Attitudes toward similar issues do not differ much in **Serbia**. 40% of the citizens prefer to buy domestic products. They generally do not think much about healthy food (61% disagree with the statement that they always think about calories while eating, and 40% disagree with the statement that they are ready to pay more for the food that contains no additives). Instant food is unhealthy, 46% of Serbian people agree with this statement. Around 70% of the population in Serbia does not agree with the statement "Most often I prepare instant food", showing that cooking is a usual life style, part of living in Serbia. People in Serbia think that in general health is the most important aspect of life (followed by family), but 33% does not care enough about healthy food.

The data obtained by the Eating Habits research show that the citizens of Serbia, when they dine at home, eat soup and potatoes the most. Most frequently consumed are also beans and meat in third and fourth place, respectively. Viewed according to region, the citizens of Belgrade favour soup, potatoes and meat the most. Citizens of Eastern and Western Serbia most frequently eat beans. In Eastern Serbia, potatoes come second while people in Western Serbia prefer their soup. All other dishes are remarkably less frequently consumed in the regions. Meat (except lamb) and traditional dishes, beans and cabbage rolls, are the most popular dishes in Serbia and Montenegro. Interestingly enough, the most frequently consumed foods are often not the most favourite ones. Thus, for instance, our people eat soup and potatoes more often than they would like to, while meat is more popular than affordable. It is also very interesting that, although we see cabbage rolls as our favourite national dish, we actually eat them less frequently than we would like to. On the other hand, although we learn that fish is healthy and exceptionally nutritious since early childhood, it is ranked only in the middle of the list of most popular dishes and even lower, near the bottom of the list of most frequently consumed food products. The main reason is the price, particularly that of the better quality fish. The data show that city dwellers are less overweight than their rural counterparts. Chances are that faster pace of life and

larger exposure to various stress-causing factors plays a certain role in keeping urban population more or less within the normal weight category. In addition, although organic food is more available in rural regions, people living in cities probably pay more attention to health aspects of eating (calories, percentage of fat taken with certain food products, combination of foods, etc.).

Regarding the attitude of consumers in **BiH** towards brands, it seems that they don't particularly long for renowned brands (majority of them don't have money to buy well known brands, 64.1%, nor they try to buy brands which are renowned among the people with whom they socialize 61.7%). For the citizens of BiH it is primarily important that products satisfy their purpose (63%). One half of the citizens (50%) disagree with the statement that they try to buy modern products which are popular. In line with this is the information that 62% of the citizens disagree with the statement that they often buy products which are promoted by celebrities whom they like. Advertisements don't have a strong influence on the citizens of BiH, which it is possible to conclude from their disagreement with the statement that, on TV, they watch equally readily TV commercials and other program (46.5%). Majority of the citizens (39%) think that advertisements don't have a strong influence on them, and on their consumer behavior. Nevertheless, 51% of the citizens think that good advertisement finishes half a job in good sales of products. Namely, although they don't admit the impact of commercials on them, they are still aware of the importance of commercials.

Loyalty to proven brands is dominant in BiH. 58.5% of the citizens always give advantage to brands which they know well, that is, 46.8% of the citizens disagree with the statement that they like to experiment with various brands. There is also a certain loyalty towards domestic brands (53.4% of the citizens agree with the statement that, whenever they can they buy domestic products, not foreign products).

The average consumption of food grains in Bosnia and Herzegovina is estimated to be 122 kg/per person (USAID, 1999) or more, and it is very low in comparison to other countries. The overall consumption of food grains is 500,000-545,000 t. The consumption of milk in BiH is estimated down to 300-400 million litres per year or minimum 100 litres/per person. This is a significant growth in comparison to the pre-war period consumption. Most of the consumption is covered by the local production. The consumers trust the preserved milk more than any other in the country, especially when they consider hygiene. Thus, there has been an expansion in consumption of yoghurt, fresh cheese and cream, which are mostly imported. In the end of 1990s, the meat consumption fell down and in 2000 it was estimated to be 70 kg/ per person. The structure of meat consumption has also changed which resulted in lower needs for expensive beef or lamb and bigger consumption of chicken (50% bigger). It is estimated that in BiH people consume around 380 million eggs yearly. The economic standard of consumers as well as raising their awareness, in combination with fresh fruit and vegetables, might increase the desire for these products. The same refers to processed fruit and vegetables (juices and preservers) and frozen fish. The consumption of beverages, mineral water, sweets and snacks has grown over the last five years due to import and intense marketing.

4. Methods

4.1 Characterisation of consumer science studies performed in WBC

To gain insight in the way research is performed in Western Balkan Countries, for instance methods and concepts used and kind of studies performed, publications were gathered in a systematically way. The content of the publications collected in the WBC as part of workpackage1 (see also Delivery 1.1 and Table 4), their focus and level of analysis vary from country to country. The most difficult task was in Bosnia and Herzegovina, Montenegro and Macedonia, where very few publications were identified (no more than 20 in each country). In those countries, the publications related to food are generally oriented toward food safety and nutrition, including technical aspects of food production.

Table 4:

Table 9: Publications in each combination of research concept and product group by listing main author and year

	Research concept and product group														
	Individual					Environment					Product				
	fruit	Health claims	organic	traditional	other	fruit	health claims	organic	traditional	other	fruit	health claims	organic	traditional	other
Serbia	2	4	3	0	8	0	6	1	1	3	1	3	1	1	2
Macedonia	1	0	0	0	3	2	0	0	1	2	0	0	0	0	1
Croatia	1	2	2	2	3	0	1	4	14	1	1	0	1	10	1
Slovenia	6	6	3	4	8	2	3	4	6	8	1	12	2	3	2
Montenegro	0	0	0	0	3	0	0	1	0	2	0	1	0	1	7
Bosnia	0	0	0	0	1	0	3	1	0	8	3	1	0	1	2
Total	10	12	8	6	26	4	13	11	22	24	6	17	5	16	15
	62					74					58				

In Croatia, Serbia and Slovenia, the content of the publications is more diverse and comprehensive. The identified documents cover different aspects of food, from food production to consumers' choice, including marketing and supply chain analysis.

As far as products with health claims, in the sense of the European Regulation (Regulation (EC) n° 1924/ 2006 of the European Parliament and of the council of 20 December 2008 related to nutrition and health claims made on food defines health claims as "any claim that states, suggests or implies that a relationship exists between a food category, a food or one of its constituents and health"), are concerned, their analysis does not exist in Macedonia, neither in Montenegro, Croatia nor Bosnia and Herzegovina. The focus is rather on nutritional analysis of dietary habits with regards to health. In Serbia and Slovenia, the food demand and potential growth are analysed, underlying the potential of marketing and technology. One of the conclusions highlighted in Slovenia is that nutritional labelling is still far from playing a role in the purchasing decision.

A high number of publications dealing with traditional food were found in Slovenia and Croatia, showing a general positive image of traditional products, analysing the market opportunities and the perception of traditional products. In Serbia, where 8% of the inventoried publications relate to traditional products, two main aspects are addressed. The first is to raise awareness on the potential competitive advantage and economic benefits of traditional food production. The second is the role played these in tradition in national gastronomy and cultural heritage. In Montenegro and Bosnia, again, the food safety point of view was adopted to analyse honey quality or risk factor of traditional food consumption.

Concerning organic products, a lot of publications were found in Croatia, Serbia and Slovenia, with diverse points of view: agronomical/food production, consumers' choice and satisfaction, marketing. In Slovenia, the main determinants of organic food consumption found were the availability in the shops, the income, the visual attractiveness and health and environment considerations. In Montenegro and Bosnia and Herzegovina, the potential for organic agriculture and the organic production standards were examined. No publication on organic products was found in Macedonia.

Finally, fruits products are rarely studied, except in Serbia, which can be explained by the fact that Serbia is an important exporter of some berry fruits (raspberries for example).

Methodologically, there is in general a lack of primary data gathered (especially research with large representative samples). Moreover, a disproportion between qualitative and quantitative studies is observed in favour of quantitative. This is probably due to the perception in the Western Balkans that quantitative research is more valuable and reliable.

This can be explained by the fact that social sciences during the social era were under political control, and that researching "in vivo" with techniques such as field research, case studies and open interviews were a matter of personal preference and responsibility ⁴ Indeed, in a centrally planned economy, the need to know produced volumes, cropped surfaces, and sold quantities prevail above the understanding of market dynamics, consumer behaviour and opinion.

It appears that the most of the publications gathered are oriented towards the research concept "environment", while the research concepts "individual" and "product" score about the same number of publications (see also Table ...).

Many of the publications' contents are either too general or too theoretical and therefore of limited applicability. Quite some papers give general information and conclusions like "consumers request a certain quality from the food producers" or "quality became a most important characteristic of the products within the world market" or "product quality can be achieved by implementing ISO series of standards", etc. There are not enough data on consumers' attitudes, knowledge and habits regarding food in general, and especially regarding different food types chosen for case studies. Less focus on fruit than on the other product groups is observed

There may be a perception that research in such "soft" science has a rather low "scientific value" compared to "pure" science. The "house" of scientific expertise in this field has therefore, perhaps, a poor foundation, while "the pillars behind food consumer science" are not interrelated and fastened together. This is the reason that a multidisciplinary approach is rare.

It is observed that the accessibility of the scientific work is very limited. There is also a lack of interaction with the international scientific community. This is illustrated by the fact that by far the most publications are published in the local languages and nearly all of them are written by local authors.

4.2 Choice in methods made within FOCUS-BALKANS

The objective of this section is to describe and discuss briefly all the methods which will be used in the research WP5 to 9, giving a quick description and the main literature references.

The Project builds on the extensive knowledge and experience of several research institutions in Western Europe (LEI, GEM, ENITA-C, ECOZEPT, AGRIDEA, UNEW) that will introduce and test the most recent approaches and tools in food consumers science, together with the WBC research institutions.

The objective of all tools presented here is to improve the knowledge of the consumer behaviour, preferences, needs and expectations. For that, both qualitative and quantitative methods would be used.

Qualitative research is a set of research techniques used in marketing and the social sciences, in which data are obtained from a relatively small group of respondents. The cue is,

⁴ Frane Adam, Darka Podmenik, Qualitative Research in a Changing Epistemic Context. The Case of a Small Social Science Community, The State of the Art of Qualitative Research in Europe, Vol 6, No 3 (2005), Forum: Qualitative Social Research

that we do not look for representative results with regard to a population but with regard to a set of ideas. A statistical analysis can be done on verbatim transcripts or other outcomes, not on the participants. One major feature of qualitative data is that they focus on naturally occurring events, having a strong handle on “real life”. Qualitative studies aim to describe a pattern of relationships, which can be done only with a set of analytical categories. Starting with the categories (deductive) or getting to them (inductive) are both legitimate. (Huberman and Miles, 1994) in qualitative research.

Quantitative research is primarily number based deductive process used to test pre-specified concepts, constructs, and hypotheses that make up a theory. It refers to surveys, conducted with a large sample to produce statistically reliable results which can be used to project outcomes to a general conclusion at the population level. It is used to determine customer needs, performance and satisfaction ratings, product preferences etc.

On a technical point of view, these approaches are very different, but they are less and less considered as opposite. Very frequently a research plan will combine a quantitative phase and a qualitative one (Delbes, 1983)

The FOCUS-BALKANS project envisages conjunction of both qualitative and quantitative methodology to analyse consumer behaviour. Such combination would allow obtaining quantifiable data for statistical analysis, based on previously obtained results of less standardised tools, such as focus groups and in depth interviews, which would allow gaining the understanding of the underlying reasons and motivations.

Having in mind the general lack of primary data and primary data analysis (see section 4.1), the consumer studies within FOCUS Balkans will orientate towards use of qualitative techniques for consumer research, validated by quantitative survey in the last research WP. Therefore, more flexible and less precise method—such as focus groups and/or individual interviews—should generally be used before the less flexible but more precise methods as surveys.

4.1. Focus Groups

In the literature of the concerned disciplines (social sciences, market sciences, and marketing) “focus groups”, “group interviews” and “group discussions” are neither systematically differentiated nor homogeneously defined. However, in spite of lacking taxonomy, focus group discussion can be characterized as “a *moderated discussion of a group of individuals on a given subject*”.

Focus Groups are often used during the explorative stage within the research process, for which they are especially suited for the generation of hypotheses. It could be noticed that recently they have been more and more used as an independent research method.

Focus groups are characterised by the two core elements. The subject matter is being introduced into the group by the researcher and the generated data are a result of the interaction within the group. It is only the combination of the two criteria which discerns focus groups as a self content research method between the two basic methods of qualitative data gathering methods: open interview for individuals and the participating observation of a group, without researcher input. (Burki 2000).

In our case, the focus group discussion will be used to deepen, in a qualitative way, some results of the consumers' survey.

Focus groups produce individual data and group generated data, which can be analysed on different levels:

- Rational level: where the group (participants and their interaction) are in the center of the consideration. Analysis based on small group interaction, research on opinion and attitudes, interaction analysis
- Content level: when distinct statements are the foreground, analysis based on conversation analysis, content analysis.

The interpretation of the focus groups is difficult because of the heterogeneity of the generated data. It has to be pointed out that until today there are no entirely satisfying protocols and standardised analysis protocol for Focus Group. The most common analysis method is the content analysis (Mayring, 1993)

However, focus groups are generally considered as among the best tools for the first approach and the wide exploration of a research field. In the project focus groups are foreseen in three of the four consumer studies: fruit, health claim food and traditional.

At the early stage of the research we can presume that our focus groups will generate new information on the method itself: a cross comparison of results between nations and sectors and later, a comparison of the results of the quantitative research, and resulting in enriching methodological knowledge of focus groups as research tool.

4.2. In depth interviews

This form of research was pioneered by Ernest Dichter, a psychoanalyst and marketing expert who is often considered to be the "father of motivational research, in the first part of the twentieth century. Dichter pioneered the application of Freudian psychoanalytic concepts and techniques to business — in particular to the study of consumer behavior in the marketplace. (Solomon, 2006). Dichter conducted in-depth interviews studies on 230 different products and many of his findings have been used in marketing campaigns

In-depth interview is a qualitative research technique that allows person to person discussion. It can lead to increased insight into people's thoughts, feelings, and behaviour on important issues. It uses flexible interview approach, aiming at questions to explain the reasons underlying a problem or practice in a target group.

The areas in which in depth interviews can be used vary from

- Understanding basic issue: why people behave in certain way?
- In pilot studies to generate ideas or hypotheses that can later be tested by quantitative surveys
- To obtain greater depth of information on a topic of interest as a supplement to data received from other methods (structured questionnaire for example)
- To evaluate the impacts of interventions on attitudes or beliefs

Some of the techniques for the in-depth interview, that are to be practiced and used, will include construction of probe questions to prompt respondents for further discussion, laddering technique leading to another level of abstractions to explain the concepts people use to organise the world, and in particular projective techniques. Projective techniques may be classified as a unstructured indirect form of questioning that encourages respondents to project their underlying motivations, beliefs, attitudes or feelings regarding the issues of concern - way of investigating the whys of situations.

They are used to uncover feelings, beliefs, attitudes and motivations which many consumers find difficult to articulate (Webb, 1992: 125-126).

Projective techniques help the researcher to enter the private worlds of subjects to uncover their inner perspectives in a way they feel comfortable with (Gordon&Langmaid, 1998:90 Loudon & Delta Bitta 1993: 619). Those most often used include associations to presented stimulus, constructions of stories or pictures, completion of sentences, arguments etc, expressive techniques of role play, drawing, painting, and choice ordering technique...

Selected types of actors to interview to be conducted within the WP consumer studies are:

1. Consumers
2. Processors and retailers

In depth interview with consumers are used to highlight the consumer perceptions on food products. Usually carried out on small samples of population, these interviews primarily address issues of creative nature and the motivational factors that drive consumer behaviour.

In depth interview with processors are crucial to analyse consumer trends and behaviour and are useful to help quantify the considered market from the point of view of actors of the supply chain. They are used to:

- To quantify markets in volume and in value and evaluate the tendencies of these markets
- Analyse and compare the strategies of the different processors/distributors present on the market
- Analyse from the processor/distributors point of view the consumers' attitude, needs and expectations.

The specificity of indepth interviews of processors or retailers is described in reference books related to marketing or market studies.

In the case of market studies, they may be an important source of:

- quantitative data on :
 - The global size of the market (in volume and in value)
 - Characteristics of this market : location, distribution channels, sociodemographic characteristics of consumers
 - competition
 - description of the global supply chain : producers, processors, wholesalers, retailers, exporters
- qualitative data to better understand consumption and consumer's behaviour through the main factors of influence such as defined by Kotler (Kotler & al, 2003) : psychological influences, cultural and social influences

One major specificity of these interviews is that "interviewers have to be chosen so that they own the same technical background is than the interviewees". (Fournis, 1995). The setting up of the sample of companies requires a preliminary operation of great importance, which consists in studying the detailed structure of the circuits of processing and distribution. The choice of processors or retailers to meet is generally easy in countries where national directory of the companies and the establishments exist. These surveys are long and expensive because of the geographic dispersion of companies, of the necessary competence of interviewers, and need more demarches before the interview and very often after the interview.

4.3. Delphi methodology

Since its development by the Rand Corporation to improve (military) technology forecasting in the 1960s, Delphi studies have been applied widely. The approach involves successive questionnaires to an expert panel, using feedback to refine an informed perspective on complex or uncertain issues. Epistemologically, Delphi studies are not merely deductive but also disclosive (Jones, 1989), and allow fragmentary perspectives to coalesce into a larger collective understanding. The best definition of the approach is found in the seminal work of Linstone and Turoff (1975, p. 3):

Delphi may be characterised as a method for structuring a group communication process in such a way that the process is effective in allowing a group of individuals, as a whole, to deal with a complex problem.

Recent use of this method has been widespread, especially in health and education topics (for examples, see Tigelaar et al. (2004); Powell (2003); Leach et al. (2001); and Lafourcade and Chapuy (2000)). A topical review of this methodology and critiques on

Delphi studies are provided by Mullen (2000). A small number of studies have been carried out to forecast food market development, but as Critcher and Gladstone (1998) note, its use in applied social science is not widespread, perhaps because it is less well known among researchers than other techniques. While many Delphi studies are focused on purely forecasting issues, a “policy Delphi” variant (Turoff, 1975) aims to provide a forum for idea generation, commentary and evaluation; facets of both forecasting and idea-generation were used in this study of Turoff (1975).

The objective of most Delphi applications is the reliable and creative exploration of ideas or the production of suitable information for decision making. The Delphi Method is based on a structured process for collecting and distilling knowledge from a group of experts by means of a series of questionnaires interspersed with controlled opinion feedback (Adler and Ziglio, 1996). Baldwin (1975) asserts that lacking full scientific knowledge, decision-makers have to rely on their own intuition or on expert opinion. The Delphi method has been widely used to generate forecasts in technology, education, and other fields (Cornish, 1977).

The Delphi method is an exercise in group communication among a panel of geographically dispersed experts (Adler and Ziglio, 1996). The technique allows experts to deal systematically with a complex problem or task. The essence of the technique is fairly straightforward: it comprises a series of questionnaires sent either by mail or via computerized systems, to a pre-selected group of experts. It can be applied:

- in other ways: by telephone, by face to face or by mixtures of different survey methods;
- it can be applied on small groups as well;
- The main thing is the re-iteration of results during several stages of survey (feeding them back into the group or part of the group for further development and validation).

The number of rounds and the size of the group can vary. These questionnaires are designed to elicit and develop individual responses to the problems posed and to enable the experts to refine their views as the group's work progresses in accordance with the assigned task. The main point behind the Delphi method is to overcome the disadvantages of conventional committee action. According to Fowles (1978) anonymity, controlled feedback, and statistical response characterize Delphi. A statistical response is not always necessary, it can be about qualitative results as well. The group interaction in Delphi is anonymous, in the sense that comments, forecasts, and the like are not identified as to their originator but are presented to the group in such a way as to suppress any identification.

In the original Delphi process, the key elements were (1) structuring of information flow, (2) feedback to the participants, and (3) anonymity for the participants. Clearly, these characteristics may offer distinct advantages over the conventional face-to-face conference as a communication tool. The interactions among panel members are controlled by a panel director or monitor who filters out material not related to the purpose of the group (Martino, 1978). The usual problems of group dynamics are thus completely bypassed.

The Delphi method has got criticism as well as support. The most extensive critique of the Delphi method was made by Sackman (1974) who criticizes the method as being unscientific and Armstrong (1978) who has written critically of its accuracy.

In general, the Delphi method is useful in answering one, specific, single-dimension question. There is less support for its use to determine complex forecasts concerning multiple factors. Such complex model building is more appropriate for quantitative models with Delphi results serving as inputs (Gatewood and Gatewood, 1983). This point is supported by Gordon and Hayward (1968) who claim that the Delphi method, based on the collation of expert judgement, suffers from the possibility that reactions between forecasted items may not be fully considered. The need for the cross impact matrix method of forecasting integrated with the Delphi method is pointed out by many researchers (Gordon and Hayward, 1968; Gatewood and Gatewood, 1983; Adler and Ziglio, 1996). An improvement in forecasting reliability over the Delphi method was thought to be attainable by taking into consideration the possibility that the occurrence of one event may cause an increase or

decrease in the probability of occurrence of other events included in the survey (Helmer, 1978). Therefore, cross impact analysis has developed as an extension of Delphi techniques.

The Delphi method is to be used in the WP 7 consumer study on organic products looking into the perspectives of the development of the organic market in each of the WBCs and in whole.

4.4. Cluster analysis

People with similar attributes tend to display similar patterns in various ways. This fact is particularly important in product development, customer relationship management, marketing, communication and risk management. For example, people with certain life-styles tend to buy certain-types of products. Cluster analysis is a collection of statistical methods, which identifies groups of samples that behave similarly or show similar characteristics. In common language it is also called look-a-like groups.

Cluster Analysis relies on distance measurements to classify data points into groups. In short, data observations close together should fall into the same cluster, while those far apart should be in different groups. There are various techniques by which the distance between two or more data points may be measured. One might add that cluster analysis helps reducing the complexity on the level of cases: out of hundreds or thousands of cases, you can distil a reduced number of groups or clusters.

Often used in market research studies, cluster analysis is similar to a segmentation method, that identifies groups of entities or statistical samples (consumers/customers, markets, organizations) that share certain common characteristics such as attitudes, purchase propensities, media habits, and lifestyle etc.

Particularly useful as a tool for developing of new products by helping identify and describing target groups, cluster analysis will be applied in the health claim products consumer study of WP 6.

4.5. Conjoint analysis

Conjoint analysis is often used to study the factors that influence consumers' purchasing decisions. Product attributes such as price, colour, ingredients, guarantee, environmental impact, predicted reliability, point of sale, presentation and so on. Consumers typically do not have the option of buying the product that is best in every attribute, particularly when one of those attributes is price. Consumers are forced to make trade-offs as they decide which products to purchase. This method allows consumer preferences for a product or service, to be broken down into trade-offs among its individual attributes, without separating those attributes from the context in which overall judgments are made.

By using a conjoint study researchers could gain a better understanding of the real value consumers attach to certain attributes when making purchasing decisions in a retail situation. The concept conjoint analysis is described by Hair et al (1998:392) as follows: "Conjoint analysis is a multivariate technique used specifically to understand how respondents develop preferences for products or services. It is based on the simple premise that consumers evaluate the value of a product or service by combining the separate amounts of value provided by each attribute." Sudman and Blair (1998:229-230) warn that it is not a data analysis procedure like factor analysis or cluster analysis. It must be regarded as a type of "thought experiment" designed to show how various elements of products or services (price, brand, style) predict customer preferences for a product or service. Kotler (2000:339) defines conjoint analysis as "...a method for deriving the utility values that consumers attach to varying levels of a product's attributes." Churchill and Iacobucci (2002:748) refer to conjoint analysis as "...conjoint measurement, which relies on the ability of respondents to make judgments about stimuli."

Conjoint analysis is a popular marketing research technique. It is used in designing new products, changing or repositioning existing products, evaluating the weight of labels or brands, evaluating the effects of price on purchase intent, and simulating market share. It is used for optimizing product configurations; studying price elasticity of demand; simulating

market response to new or modified offerings; diagnosing competitive strengths and weaknesses

The value of conjoint analysis lies in the fact that it estimates how much each of these attributes is valued, and as Churchill and Iacobucci (2002:748) state, "...the word *conjoint* (*"CONsider JOINTly"*) has to do with the notion that the relative values of things considered jointly can be measured when they might not be measurable if taken one at a time."

In FOCUS Balkans studies the conjoint will be used for WP 8 measuring the consumers trade-offs between preferred attributes of traditional and local food products.

4.6. Classification methods

Decision tree models provide a highly effective structure within which you can explore options, and investigate the possible outcomes of choosing those options. They also help you to form a balanced picture of the risks and rewards associated with each possible course of action.

This makes them particularly useful for choosing between different strategies, projects or investment opportunities, particularly when your resources are limited.

4.7. Quantitative survey

Quantitative research is the systematic scientific investigation of quantitative properties and phenomena and their relationships. The objective of quantitative research is to develop and employ mathematical models, theories and/or hypotheses pertaining to natural phenomena. The process of measurement is central to quantitative research because it provides the fundamental connection between empirical observation and mathematical expression of quantitative relationships.

Quantitative research is widely used in both the natural sciences and social sciences, from physics and biology to sociology and journalism. It is also used as a way to research different aspects of education.

5. Specific theoretical background for the different food market researches

The FOCUS-BALKANS project deals with the area of food products. Since it is not possible in FOCUS-BALKANS to explore all food market segments and products conceivable in all six participating WBC countries, the consortium of the Focus- Balkans made a choice and demarked the subject of research: four product markets were chosen to be central during the project and in the work packages. These markets are [a] the fruit market, [b] products with 'health/diet' claims, [c] organic products and [d] traditional regional products.

The objective of this part is to give the opportunity to each WP leader of the WP5 to 8 to present an up-to-date short list of references and short theoretical background related specifically to each WP, giving for each subject matter a broader view (such as a worldwide or European point of view in the field). The link to the theories, models and methods described in this Theoretical Framework will be indicated.

5.1. Consumer study implementation for fruits and nutrition balance

5.1.1. Introduction

Importance of fruit and vegetable consumption in relation to health

At present only a minority of the world's population consumes the recommended average amount of fruits and vegetables, which contribute to cardiovascular health and when consumed in an amount of 400-500g per day, they reduce the risk of coronary heart disease, stroke and high blood pressure (WHO, 2003).

The European Council commented the issue of fruit and vegetable consumption as follows: "*Consumption of fruits and vegetables is proven to have positive health aspects for consumers. Consumption is decreasing. The Commission should give priority to projects and proposals promoting fruit and vegetables consumption within the framework of the CMO for fruits and vegetables or within the framework of the horizontal promotion measures. The recognised effects on health can be better communicated to consumers. The Commission is invited to examine whether it would be opportune to introduce a school fruit scheme to reach young people. A proper cost-benefit analysis should be incorporated in the analysis.*"

The FAO Organisation mentions low fruit and vegetable intake as one of the most crucial nutrition issues to deal with at present: "*Increasing fruit and vegetable consumption is a major public health challenge at the moment,*" says Kraissid Tontisirin, Director of FAO's Food and Nutrition Division.

The Head of the Health Promotion Centre Institute of Public Health of the Republic of Slovenia, Mojca Gabrijelčič Blenkuš (2007) identifies "Fruit and Vegetable" as one of the key food groups in human diet. Sufficient intake of fruit and vegetable provides the body with essential nutrients that increase the body's antioxidative potential, as well as with dietary fibre; the inclusion of fruit and vegetables into the diet effectively reduces the energetic density of daily meals.

Research has shown that six out of seven most important causes of premature death among European citizens are related to nutrition and physical activity. The fifth most often risk factor mentioned is too low fruit and vegetable intake (in 2000). This result shows how important nutritional education on fruit and vegetable consumption is. Fruit and vegetables should be one of the basic elements of people's diets to enable a healthy life and prevention from diseases.

Main health topics dealing with decreased fruit and vegetable consumption in Europe (nutrition-related diseases)

Extensive medical research links increased fruit and vegetable consumption with improved cardiovascular disease prevention. There is also tangible proof that fruit and

vegetables consumed in appropriate quantities prevent from various cancers, and they are a key ingredient in the fight against obesity (Freshfel 2005).

The relationship between diet, physical activity and health has been scientifically established, in particular regarding the role of lifestyles as determinants of chronic non-communicable diseases and conditions such as obesity, heart disease, type 2 diabetes, hypertension, cancer and osteoporosis

State of consumers' awareness of fruit and vegetable consumption's relevance in health care in the European Union

There is general consensus that the consumption of fruit is an essential part of a balanced diet, which in turn plays a primordial role for the prevention of chronic sickness and premature death (Brug et al. 1995). However, the consumption of fruit in Europe has been declining over the last couple of years. Despite promotion efforts, average consumption of fruit remains well below the level recommended by the World Health Organisation (WHO) and nutrition experts. Only a few Mediterranean countries, where availability of fruit is high, are currently meeting the recommendation on a population level. It is clear that more insight in the preferences of European consumers towards fruit and fruit products is necessary to develop well-planned interventions to encourage fruit consumption.

Nutrition education has been surveyed in Croatia by Kljusuric and Baric (2004). The observed increase in consumption of fruit and vegetables among schoolchildren in Croatia has implications for nutrition education, as teenagers' independent choice should be considered in designing education material. Hence, nutrition educators should educate not only teenagers, but food producers and marketers to create nutritious snacks and to find ways to promote their sale among teenagers.

A dated analysis of nutrition on Slovene farms has been found in the framework of the Final Implementation report (Lasser, Pauli, Stehele and Volker (2006)) describing the nutritional Situation of the Elderly in Eastern/Baltic and Central/Western Europe, in the framework of an European project, The Ageing Nutrition Project. In 1996 (Urbančič Alenka) a cross-sectional study was carried in order to evaluate the nutrititional and health status of Slovenian farmers. There are many differences in the quantity and frequency of food consumption between different Slovenian regions. In the northern part of Slovenia more milk and meat products are consumed, while in the coastal region more fruit and vegetables are present in the diet. There are practically no differences in nutritional habits between full-time and part-time farmers. The traditional farm food consumption is slowly losing its importance in everyday nutrition.

Growing importance of nutrition information, especially on fruit and vegetable consumption, in relation to health issues in Europe

Developing urbanisation and economy proves to have an influence on the changing consumption patterns in different countries. These changes deal not only with what one eats but also how, and when. The so called "nutrition transition" means dietary changes including both quantitative and qualitative changes in the diet. One can observe a tendency of consuming products of higher energy density (fat, added sugars in foods, reduced intakes of complex carbohydrates and dietary fibre), and reduced fruit and vegetable intakes.

The 2007/2008 Macedonia GSHS Global School-based health survey used a two-stage cluster sample design to produce a representative sample of students in elementary and secondary school; 2.114 questionnaires were completed in all 30 schools. In Macedonia, 14% of students were at risk for becoming overweight and 1.5% were overweight. According to the findings of this survey, the RIHP write that is necessary to pay special attention to the direction of the programmes for health promotion and health prevention. A lot has to be done on improvement of the information and improvement of the healthy lifestyle based on behavioural change. As concerning fruit and vegetable intake, Overall, 83.7% of students usually ate fruit, such as apple, pear, orange, banana, grape, melon, or watermelon, one or more times per day during the past 30 days. Overall, 31.5% of students usually ate fruits and vegetables five or more times per day during the past 30 days

The School Fruit Scheme is a very important measure of the European Commission, as it may curb presently increasing trends of excessive body weight and obesity in children and adolescents. Such measures may ensure a long-term protection of children and adolescents against obesity. Equal accessibility of these measures, which represent an effective tool for ensuring equity in health, would provide social equity for all children and help them develop healthy dietary habits. School Fruit Scheme supports the favourable impact on the promotion of healthy nutrition; however, a comprehensive approach to these issues would call for additional measures to counteract the adverse influences on children and adolescents' dietary choices, such as e.g. measures to ban marketing of unhealthy food to children. It is estimated that the investment into School Fruit Schemes would be justified when compared with the disease burden, i.e. direct and indirect disease-related costs and the costs of lost opportunities as well as all the consequences of a lower quality of life already in childhood and particularly in later life (Blenkuš, 2007).

Finally, fruit products are rarely studied within the WB region with the exception of Serbia. (This particular trend can be explained by the fact that Serbia is an important exporter of some berry fruits - raspberries for example). Consequently, information on food availability, dietary patterns and health in the WBC is limited. Moreover, the high use of animal products, such as pork meat and dairy products, is likely to have negative implications for the health of Balkan population. While, over the last years, new *fat free* and *light* products offered by the agro-industry have met a growing demand, this phenomenon is largely restricted to the main urban centres. While health is closely linked to incomes, regional anomalies are apparent. More information about consumption of healthy food (fruit) and nutrition balance is essential for the development of food policies designed to ensure sufficient food supply and improved human health and well-being in the WBC's. However, the extent of these trends and the underlying consumer motivations remain unclear and non-quantified. The future of agriculture and food industry in the Balkans depends on the producers' ability to understand market trends and to take into account the consumer's needs.

5.1.2. Objectives and Methods

The general objective of the FOCUS-BALKANS project is to improve competencies and understanding in the field of consumer food science in the WBC. Specifically in this work package (WP5) objectives are as follows:

- To elaborate a state of the art regarding the consumption of fresh and processed fruits in the Balkans on the basis of WP 1 general results (see also section 4.1) and draw conclusions concerning the execution of this WP 5.
- To explore, analyze and understand motivations related to the purchase and consumption of fruits and processed fruit products in different situations or consumption moments.
- To identify the role and barriers to fruit consumption and consumer characteristics in relation to nutrition
- To identify the position of fruit and processed fruit in a well-balanced diet from Balkan consumers perspective.
- To give an insight of the Balkan producing fruit industry and their market expectations
- To provide inputs for WPs 9, 10 and 11.

Research framework

The general research framework, which will be the base for the outline of the research plans in WP5 is illustrated in Figure 9. To take a closer look at the fruit and diet balance situation in all of the six participating WBC countries an insight in the (interaction between) market actors and consumers is needed. Without consumers there will be no consumption, but without the market there's nothing to consume at all. The different parts of the model are presented visually below.

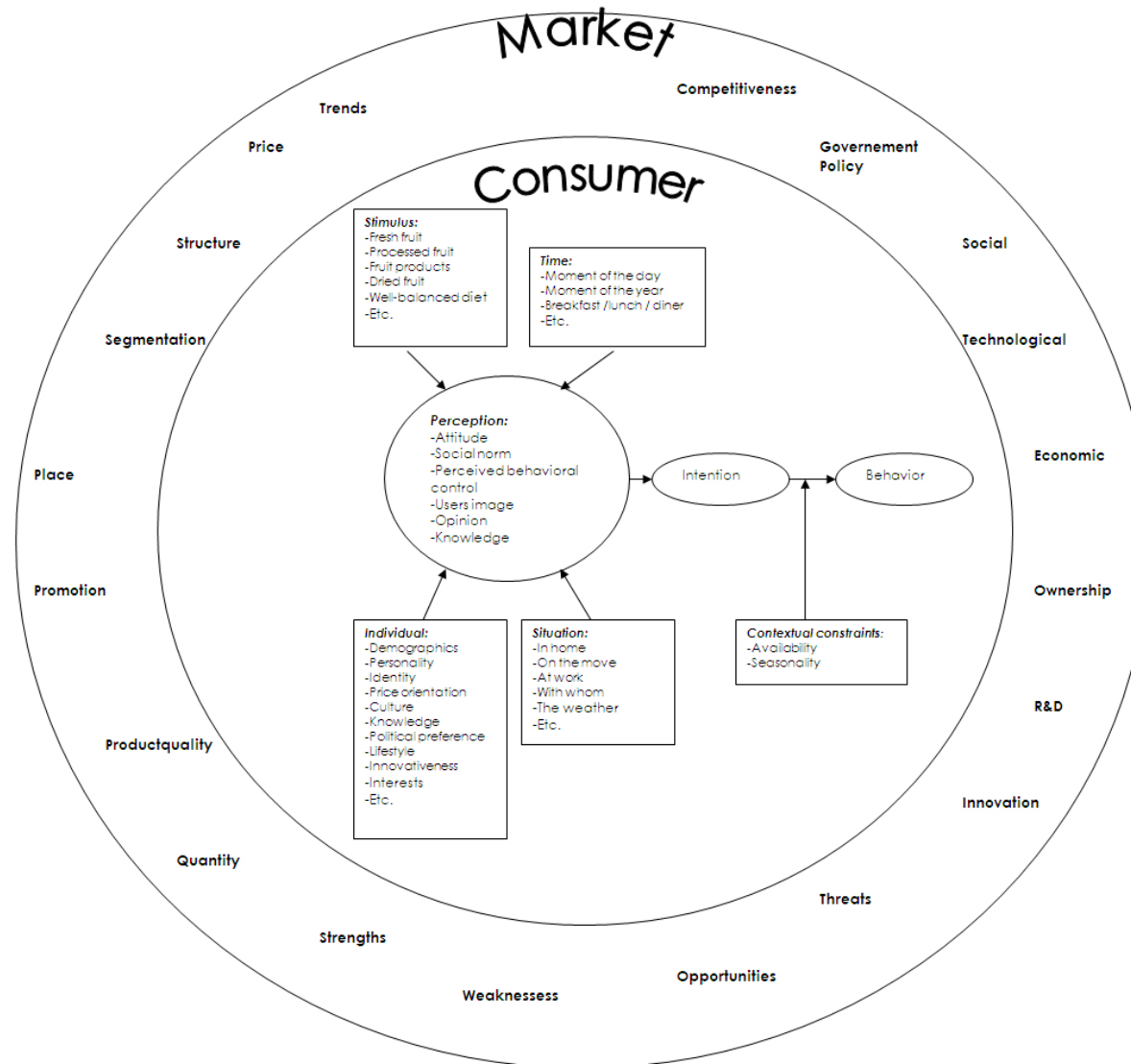


Figure 9 WP5 General Research Framework

The characteristics in e.g. trends, innovation and communication, of the market are based on indicators that describes performance that influence consumers fruit choice. Concerning the *market*, we look briefly at developments in the fruit sector to come to a overview of the fruit sector and give an insight in the Balkan producing fruit industry and their market expectations. In order to remain licenced to operate (to survive) market actors have to anticipate and act upon current situation. They carefully watch developments within, have knowledge, and we are going to discuss these with relevant experts to reveal the needed overview. Topics for discussion during the interviews are current and future situation, elements of a SWOT and the marketing-mix and their interaction with consumers. Examples of questions: "Is the fruit sector competitive in terms of new products?", "Do the market actors anticipate new trends?", or "How do they act upon current competitive situations?",

As can be seen from Figure 9 a lot of aspects are relevant regarding consumer food consumption choices. The total palette holds more topics than can be subject of research. We therefore focus on the exploration of motivations and barriers as the background of consumption and purchase of fruit, and the position of fruit in a well-balanced diet and intend identify the role and barriers to fruit consumption and consumer characteristics in relation to nutrition. To this end, an (in-dept) insight in the perception of consumers is needed. The perception of consumers, is based on a stimulus which is differently perceived according to the consumer characteristics, time and situation. Examples of questions: "Which kind of fruit do they prefer in which situation", "Do the consumer think he has a healthy life stile" or "What benefits does the consumer perceive?"

In a number of consumption models the determinants of product choice are structured according to the individual, the situation, and the product (i.e., Belk 1975, Bloch and Richins 1983; Dickson 1982, Zaichkowsky 1985). Similarly, these same determinants are used to structure variables related to food related behaviour and perception (i.e., Gains 1996; Kahn 1981; Randall and Sanjur 1981; Rozin 2007; Sijtsema 2003). Sijtsema (2003) developed the Food Perception Model in which these determinants are embedded (see Figure 10).

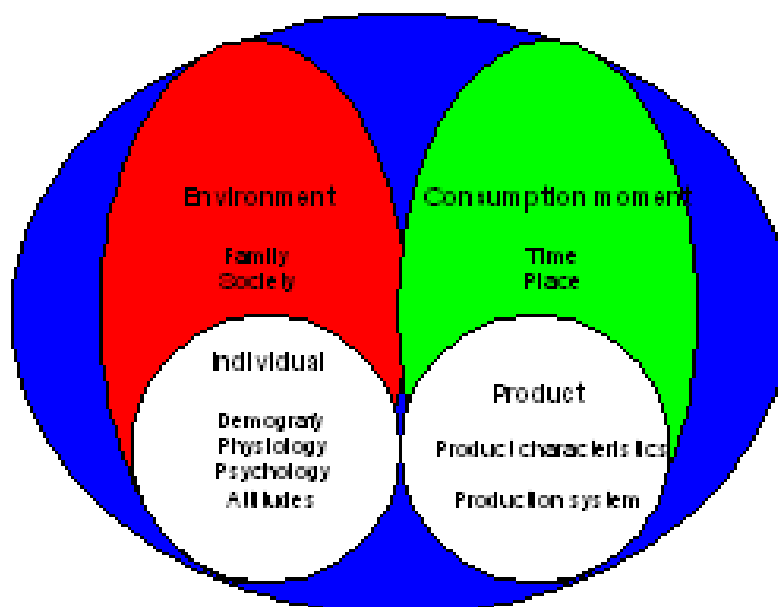


Figure 10 Food Perception Model (Source: Sijtsema 2003)

Individual determinants of food perception could be divided into demographic variables, physiological factors, psychological factors and attitudes. Food-related determinants of food perception are decomposed into product characteristics (for example the colour of the food) and the production system (for example whether the food is organic). In addition, while most studies refer in the situational component to both physical surroundings and social surroundings (Belk 1975), Sijtsema (2003) made a further distinction between environment and context. Whereas the environment consists of the social and cultural environment (family and

society characteristics), the context contains the consumption moment and place of consumption (Sijtsema 2003). In addition, according to Köster and Mojet (2007), situations are defined by the meaning attributed to the surroundings and the resulting expectations of the individual with regard to this situation. For example, hunger makes that we want to eat something, but hunger when sitting alone in front of the TV reminds us of other types of food than when at a dinner with friends at home or with a group of business relations at a restaurant. It is clear that people do not just eat products, but they eat what they like in different meaningful situations (Köster and Mojet 2007).

In Sijtsema's (2003) model, no distinction is made between the objective aspects (the package is blue and it contains 200 grams of rice) and the perceived aspects (the product is tasty). Rozin (2007) notes that ultimately the food product and environment are filtered through the person: that is, it is the *perceived* product and environment that influence choice.

Research Plan

To meet the objectives, the following activities are planned to be carried out - all with a focus on fruit in general (e.g. fresh or processed).

a. Literature review

A literature study will be carried out based on format in WP 1 (see Table 4) and applying extra information about fruit (products), consumers, markets. Also availability of scientific information and developments in Europe etc. This review will give the opportunity to present an up-to-date short list of specific references to fruit and fruit market literature in WBCs and will give a broader view (such as worldwide or European point of view) in the field.

b. Market study

In order to be able to give a better understanding of the consumption of fresh and processed fruits in the WBC several interviews will be held with persons representing Authorities and Fruit industry (Processors or Professionals). These expert interviews will address topics as consumption, production, competitiveness sector, SWOT, trends, health policy. These interviews will be face to face that usually last for 30 to 60 minutes. It's a good method for investing personal opinions, beliefs, and values and is very useful at uncovering hidden issues

c. Consumer study

Central in this part of the Workpackage are consumers, and their motivations and behaviours for fruits and fruit products in the Balkans. To this end, two activities will be carried out. In the first place (part a) consumer in-depth interviews are scheduled. The aim is to gain a qualitative understanding of fruit consumption in the WBC. The interview method used in this section is similar to the above, interviews with experts. These interviews will address topics as such as healthy lifestyle, objective knowledge, consumption related to fruit product, consumption frequency and situation, motives and barriers, benefits, purchase information, socio demographics, etc. In sum, a broad perspective is taken into account. Then (in part b) focus groups will be held on special topics of interest. Focus group discussions are an interactive group discussions lead by a moderator.

5.2. Consumer study implementation for products with health claims

5.2.1. State of the art based on literature

Although medicine and life sciences started with nutrition and health studies a long time ago, healthy living had been an increasingly salient part of the food market till the end of 20th century. An increasing number of studies about foods with health claims can be seen as part of the rapid development in medicine and life sciences. The interconnection between nutrition and health is the core aspect of these studies. At the same time, technical advances in food engineering and manufacturing have opened up possibilities in developing products with novel technologies and enriching foods with new ingredients (van Kleef *et al.*, 2002, Verschuren, 2002).

During the 1990-s, government policies, both in developed and developing countries, put more focus on health promotion and preventive measures against illnesses. Thus health has become a life-long project of keeping well and fit, including self-control and continuous work towards better health. (Burrows *et al.*, 1995, Petersen and Lupton, 1996, Strauss and Tomas 1998). People are generally well aware of the importance of balance, variability and moderation as the cornerstones in eating healthfully (IEFS, 1996a). The public discussion about the future of eating behaviour and the potential adverse effects of health claim products is an important topic in literature, too (Lawrence and Germov, 1999, Roe *et al.*, 1999, Nestle, 2002, Garde, 2008). A new food category termed 'functional foods' (foods marketed as improving health and well-being beyond the health effects of conventional foods) gained in importance on the market during the 1990-s, and started to develop rapidly in market volume during the last decade. (Diplock *et al.*, 1999).

However, health claim foods are not a well-defined category. In most countries there is no legislative definition of this group of foods. A literature review showed that food labeling is an increasingly important field of research (Caswell and Johnson, 1991, Caswell and Padberg, 1992, Caswell and Mojduzka, 1996, Heasman and Mellentin, 2001, May *et al.*, 2007). Furthermore, the WP6 Literature overview confronts FOCUS-BALKANS project investigation with a novel dilemma – rather than being healthy in an absolute sense, these products might represent only the idea of healthiness (Ostberg, 2003, Wansink and Cheney, 2005, Lesch *et al.*, 2005). Criticism towards products with health claim will be considered from a different points of view, when having in mind that products with different health claims have not been approved by EFSA.

Within the field of existing health claims, products development and commercialization (supply side of the food market), the literature analysis focuses on conceptualization of the innovation process, identification of market opportunities and regulatory/business environment (Van Kleef *et al.* 2002, Mark-Herbert, 2003, 2004, Stewart-Knox and Mitchell, 2003, Gray *et al.*, 2003, Maynard and Franklin 2003, Korhonen, 2002, Schaafsma & Kok, 2005, Deepananda *et al.* 2008). Moreover, innovative process oriented research has been developed in a specific case-study context and largely with a focus on Europe (Hall and Mairesse, 2006, Peng *et al.* 2006, Broring *et al.* 2006).

Research in the field of economics, marketing, psychology and social sciences with varying perspectives on food with health claims turned to examine consumer points of views since the 1990s. Qualitative and quantitative consumer studies focus on different aspects of the phenomenon. The first kind of studies focused on the meanings and interpretations of health claim products, while the second category of studies emphasized attitudes towards specific health claim products.

Qualitative consumer studies mainly include notions about healthy diets, relations between 'natural' and 'technological' (including bio-technological) food, and the position of health foods products between foods and medicine. (Jonas and Beckmann, 1998, Brannback *et al.* 2002, Larue *et al.*, 2004) The contradiction between natural and technological food is particularly evident in health claim foods that are characterized by high technology and novel ingredients (Sorenson and Bogue, 2005).

In contrast to the qualitative approaches, quantitative studies often focus on attitudes towards product types with the aim of finding out what kinds of products, added ingredients, tastes, health claims or combinations of these would most appeal to consumers within different cultural and historical frames (IFIC, 2000; NIN, 2002; van Kleef *et al.*, 2002; West *et al.*, 2002; Bech-Larsen and Grunert, 2003; Urala *et al.*, 2003, Labrecque *et al.*, 2006, Kolodinsky, *et al.*, 2008). These studies indicate that factors such as price, healthiness, convenience, form of processing and promised health effects play a vital role in product with health claim acceptability. From the economic point of view, analysis suggested that the belief in health effects was a strong indicator of willingness to buy health foods (Bech-Larsen *et al.*, 2001; Urala and Lähteenmäki, 2004; Verbeke, 2005). However, studies on health claims have shown that consumers tend to be distrustful towards manufacturers' claims (Garretson *et al.*, 2000, Bhaskaran and Hardley, 2002; West *et al.*, 2002). The analysis of food demand at the retail level, influence of health information on food demand and importance of product quality for food demand have been also investigated topics (Herrmann and Roeder, 1998, Kozup *et al.*, 2003). It was hard to find a complex theoretical study about factors affecting market for products with health claims both from supply and demand side of view. Theoretical background was found in the Handbook of Agricultural Economics (Antle, 2001). Empirical studies trying to emerge issues of health claims products development from supply and demand side of the market are rare, too (Cash *et al.*, 2006).

Relatively few studies have investigated the role of socio-demographic factors in the acceptability of functional foods. Studies indicated that citizens' views about food and health as well as their eating patterns are related to age, gender, socio-economic status and phase of life (IEFS, 1996b; Nayga and Capps, 1999, EORG, 2003, Poulsen, 1999). These studies pointed out a few important conclusions. The most interesting for FOCUS-BALKANS project are following findings: (1) women are generally more focused on healthy eating than men and tend to eat more healthily; (2) concerns about healthy eating increase with age (the elderly were most willing to buy functional foods); (3) the highly educated maintain more healthful eating habits than others; (4) eating so-called health food is related to views on and willingness to use functional foods. Other found that socio-demographic backgrounds explained attitudes to functional foods only poorly (Verbeke, 2005). As functional foods carry a special meaning as health-promoting foods, their acceptability is likely to be connected to peoples' health concerns and practices (Jong *et al.*, 2003).

In WBC a little attention was paid to the products with health claims analysis (see Table 4), both from consumer and producer point of view. The analysis of regulatory framework, medical and technological aspects are present at elementary level. Vast majority of WBC articles about products with health claims (functional food) are published in medical journals or in agricultural journals by authors that have medical affiliation or medical background (Koch, 1999, Ristevska – Jovanovska, 2000, Sobajic, 2002, Marčeta-Kamenko *et al.*, 2004, Miletic *et al.*, 2008). There are several theoretical articles emphasizing health benefits coming from consumption of functional food or analyzing legal environment and regulations regarding this food type, its definition, labelling, good nutrition practice and food safety etc. (Stankovic and Djordjevic, 2002, Grujic, 2005, Raspor, 2008). Several papers analyze possible contribution of marketing and technology to the offer of food with health claims (Rogelj, 2000, Dimitrijević-Branković *et al.*, 2002, Dimic *et al.*, 2002, Ristic, 2003, Ljaljević A. *et al.*, 2006). On the other hand, there is no data regarding consumers' knowledge about functional food and attitudes towards this type of food, confidence in its proposed effects or consumption habits (regular food vs food with health claims) in the scientific journals.

Worldwide and EU perspective of functional food analysis supports the FOCUS-BALKANS project with plenty of ideas for further analysis of products with health claims from consumer's, processor's, retailer's and public policies makers' point of view (WP6 analysis), that can help in improving consumer science in WBC.

5.2.2. Objectives, Models and Methods

The main purpose of WP6 is to identify the image and values that are given to health food product by consumers in WBC. A specific attention will be put on the global health and food worlds, the places and occasions appropriate for dietetic products consumption (social

factors), the factors of this consumption (food habits, health concerns, prices, products availability, taste, etc.) and the resulting expectations and behaviors regarding those products. The analysis will lead to the identification of the main firms in WBC present at this market segment and quantification of the main markets. It will be focused on products marketed through specialized channels and on products selected in supermarkets.

Processors advertise their products with a growing use and stress of a specific property with a healthy added value, either when it refers to a natural property (such as calcium in cheeses) or to an added component (enriched product). A precise and closed list of products to be studied is defined, with a repartition by family of products. For each product, data will be collected about the commercial name, the products characteristics, the firm and the product's origin. Shop check will result in an almost exhaustive firm's identification and in a good visualization of the different products present on the market. This Case study is linked with the Regulation of the EC on health claims: Regulation (EC) N° 1924/2006, 30.12.2006 relating to the labelling, presentation and advertising of foodstuffs, especially when dealing with nutritional and health labelling. Overall, this WP is of particular importance to make WBC partners aware of the issue of cross compliance between nutritional and public policies.

WP6 analysis is based on the multidisciplinary approach to the consumer study. It will be oriented to the different surveys: consumers, processors, retailers and public policy makers.

The relevant legislation in the WBC and in the European Union will be analyzed and **qualitative interviews with public administrations and professional organizations** representatives and with marketing and technical experts in the Balkans as well as in the European Union will be done.

Qualitative consumer survey will be conducted in order to identify the image and values that are given to health food products by local consumers. A specific attention will be put on the global health and food worlds, the places and occasions appropriate for dietetic products consumption (social factors), the factors of this consumption (food habits, health concerns, prices, products availability, taste, etc.) and the resulting waiting and behaviors regarding those products. Method will be focus groups discussion (2 per each WBC with groups «50+» and «mothers with children under 7»). In our study, the explained constructs of dual mediation hypothesis combined with the basic premises of the elaboration likelihood model will serve as the theoretical framework for consumer research of products with health and nutrition claims in the Balkans.

Processors and retailers survey will support local health food products with offer data throughout conducted in-depth interviews with listed companies present at this market segment. Companies that produce products with nutrition and health claims in WBC were identified and main products categories present at this market are milk and yogurt, fruit juices, margarines and jams. Totally 53 firms will be surveyed according to the identified producers by linear and specialized shop checks. Furthermore, the mass marketing survey is the WP core aspect. The objective is to obtain quantifiable data, namely market shares of the health food products of one category, compared with the traditional products shares of the same product category (e.g. light margarine compared to classical), and qualitative data on several aspects: consumer demand, firms ability to answer this demand, main problems encountered (regulatory or else...). Surveys with buyers and retailers (specialized or not) will be done by mixed questionnaire (quantitative analysis with detailed facts and figures and qualitative analysis with open questions). The sample size will allow extrapolations and cluster analysis.

The final result of this study will be a report on the consumer motivations and behaviors for products with nutrition and health claims seen from the perspective of consumers themselves, but also from the producers, retailers, policy makers and consumer organizations point of view.

5.3. Consumer expectations towards organic products

5.3.1. State of the art based on literature

Europe's organic farming developed through various stages, unequally in different countries, even among same regions. Generally, according to Hamm & Zanoli, (2004), few periods in this development process can be identified. First period, from the beginning of organic production in the twenties until the sixties, only a small part of the Europe knew about and was interested in organic food products. The organic products were consumed in the production regions themselves, which were particularly the German-speaking countries and the UK, but the trade of these products had not been developed.

The organic food market shifted to the supply end with the introduction of financial support schemes in 1987 in various European countries. The EU recorded the beginning of an enormous growth period for organic production. This can be accounted for the supply-driven market growth of organic farming. In trade and consumption, there is a clear south-to-north trade to be observed in Europe because the major consumer markets are located in the northern countries, whereas most of the production, like fruits and vegetables is situated in the southern countries.

Nowadays, the north and south division among consumer countries and producer countries is still present, although a consumption boom in Italy reached levels not very different from those of Germany or UK. On the other side, in Italy as well as in most European countries, a north-south consumer-producer split can be observed. While the biggest market within Europe is still Germany, Denmark and Switzerland experience the highest per-capita organic food expenditure (Hamm & Zanoli, 2004).

The experienced market growth did first slow down in 2003, especially in the large retail sector, while the specialised retailers (in countries where they have relevant market share i.e. Germany and Italy) are facing a turbulent situation of restructuring.

Organic is one major direction, which has attracted the attention of several researchers because of the changes in paradigms it represents, both at producers and consumers sides. Fair trade, origin and place of production as well as modes of production have been also for higher importance towards consumers over the past decades and in reaction to food safety crisis and globalization of the markets.

As Sirieix and Codron (2004) note:

« if the market for organic products has recently developed, it is not mainly due to an increasing concern for environmental issues, but rather to a reaction to the recent food crises. »

They specify, nevertheless, that as

“fair-trade [is] more strongly linked to the ethical dimension than organic production is to the environmental dimension, it must be feared that it will not develop in the same way” (Sirieix and Codron, 2004).

The choice of organic products and ethical products seems to be difficult for the consumer as they do not distinguish well between these two categories. The notion of ethical quality of a product is quiet relative for the consumer. The definition depends on the education of consumers, on the circle of acquaintances of the consumer or on the self convictions of the consumer.

“When consumers encounter the complicated marketplace, ethical values are only one of many motivations pushing them toward particular purchases” (Ehrich and Irwin, 2005).

For organic products, consumers make their choice taking account of the health benefit and eventually sustainable development:

“With regards to safety, worry and fear are expressed in regard to the use of chemical pesticides, medicines and growth hormones in animal production, food

pathogens of significance for human health, and the possibility of GM contamination of organic products." (Torjusen et al. 2004.).

Consumers are nevertheless influenced by external effects such as their education. At least, it appears that demand for the two categories, organic products on one side and ethical products on the other side, are related in some way to education

"Consumers who buy organic foods seem, in general, to be more ethically concerned and idealistic than conventional food buyers." (Torjusen et al. 2004.).

As the distinction between ethical and organic products is not very clear, some consumers like to know what specialists think about the product to make their choice. They like specially labels, which certify a verification of the origin of the product and of its quality. These labels are though very important in the food market. A study says that consumers have generally "a great confidence in the government (which certifies the label)" (Bjorner et al. 2004).

The role of the label is very important to give a certification of the value of the product. It helps although the consumer to make his choice, who knows that labels are controlled and sure.

"Environmental label has had a significant effect on the choice" of their purchase (Bjorner, T.B., Hansen, L.G., Russell, C.S., 2004). Consumers "are usually changing their purchasing patterns (...) as they become informed of the health benefits (...) and advertising is an important source of information" (Caswell, J.A. and E.M. Modjuszka, 1996). "Consumers are willing to act on an environmental label even though this does not yield any direct benefit to the users it also indicates the presence of altruistic motives of some kind" (Bjorner et al. 2004).

As consumers know that labels which are on products indicate a certification of a certain quality and of an origin of a region or a country, this influences the consumer's supply on the market. Some consumers may pay extra for a label linked to the development of their region or country.

"Consumers perceive that locally grown foods are healthier than foods grown at distant locations" (Pirog and Larson, 2007).

Consumers, who purchase quality products, seek better freshness and organoleptic qualities:

"Consumers appreciate local food for its taste, freshness, and quality" (Pirog R., Larson A., 2007) and "To many, organic food represents local sourcing and is therefore an indicator of freshness" (Torjusen, Hanne ; Unni Kjærnes, Lotte Sangstad & Katherine O'Doherty Jensen (2004)). This idea of appreciation is very influenced by the society: "Individuals appear to care about their own relative position, and also the relative position of their community and country" (Solnick and Hemenway,, 2005).

Finally, it is important to take advantage of the potential of suggestible consumers, by providing them with appropriate information thanks to labels which certify the quality of the product of their region or country first and then of the product which are made in a long-lasting way.

Clear and simple labelling of organic food is important to consumers. At the same time, many consumers want more in-depth information about the food and the food system than a label normally allows. (Torjusen et al.2004).

It appears that the three dimensions of ethical, organic and regional products have to be related. It helps the consumer to know the quality of the product, and consequently some

consumers are willing to pay more. Nowadays many consumers like to know the origin of the product and even like to know the producer. Beyond these three dimensions, the environmental dimension of food consumer behaviour has also been studied. Pirog and Larson (2007) note that:

Consumers are willing to pay more for food supply chains that emit half as much greenhouse gas as conventional (Pirog, and Larson, 2007).

John Thøgersen (1999), based on a study for Denmark, has shown that the claim that environmental attitudes are based on moral reasoning is valid with regard to consumer buying attitudes, under certain conditions. The first of which is the general level of environmental concern (but many consumers fail to perceive or understand the connection between their buying decisions and various environmental problems). The second condition is the absence of other highly involving characteristics which depends on the particular purchasing situation. (Thøgersen, 1999).

Ellen et al, (1991), demonstrate that PCE⁵ (Perceived Consumer Effectiveness) influence the individual's willingness to engage in environmental friendly behaviours. There is a clear link between the PCE original construct and the willingness of the consumer to make individual sacrifices.

From the WP1 overview it is clear that research on organic food in the WBC is pretty limited and mostly it does not fit the needs of operators (farmers, consumers and/or advisers), because it is carried out in farming systems, locations and with means that cannot be implemented and sustainable in the long run. Long-term experiments are completely absent and very limited on-farm and participatory research exists. The limited availability of research results is also negatively influencing the possibility to have a certain "weight" on future EU level while establishing standards or deciding political tools to promote organic production.

In terms of topics, most of the papers is purely theoretical reporting, with very few references to specific WBC issues, or with primary research. Holistic and interdisciplinary research is very rare in WBC countries, not only in the field of organic food.

5.3.2. Objectives, Models and Methods

The main purpose of WP7 is to examine the consumption of organic products in the Balkans from different perspectives. The demand and expectations for organic products in the WBC will be assessed, as well as the current situation of the organic production. Trends and measures will be identified.

To achieve these objectives, the Delphi method will be used. Given conditions in the organic market, the use of the Delphi approach provides potential for valuable market intelligence on key issues, including future growth trends, evolution of factors influencing consumer demand and supply chains, and scope for improved policy intervention. The study reported here formed part of a larger study of the marketing of organic products in Europe (reported in Schmid et al., 2004), aiming to support marketing strategies for collaborative producer groups.

In general, there is a lack of statistical data in the sector of organic food in scientific research (Hamm and Gronefeld, 2004). Because of this gap in statistical data and the rapid recent developments and diverse local circumstances, it is very difficult to use conventional analysis to predict the evolution of the organic products markets. Therefore, this project will use a well-established qualitative tool, the Delphi method to explore the dynamics of, and prospects for the development of the market for organic food in WBC.

5.4. Consumers' attitudes, expectations and behaviours towards traditional food

⁵ PCE is defined as a domain-specific belief that the effort of an individual can make the difference in the solution to a problem.

5.4.1. State of the art based on literature

Traditional foods constitute the basis of food basket for local inhabitants in rural areas and small cities of most countries all over the world. They are generally related to long history and local culture. Hence traditional foods are often identified at the opposite side of industrial and strong branded food products. Produced in the surroundings of their local market area, traditional foods do not often reach far-off markets in great urban areas, apart from fresh fruits and vegetables. Eating traditional foods heavily depends on the size of production area, and efficiency of short distribution channels or direct sale from farm on local market (Alkon, 2008; Committee of the Regions, 1996). Local availability of the given product is a key element for its supply; accordingly, consumption of traditional foods is mainly seasonal, even for processed foods.

None scientific evidence is given on the fact that traditional foods are only processed foods instead of raw foodstuffs. Consequently, the range of traditional foods includes local artisan cheeses, processed meats, bread and pastry made with local cereals or ancient recipes, local beverages with or without alcohol. Local varieties of fruits or vegetables, local meals including several cooked food items also belong to traditional foods as far as they are well documented since long time in the local market.

Definitions

WP8 will assess the different definition of traditional food products in the field of WBC. The understanding of traditional food products is a complex dynamic of interrelated concepts issued from agricultural economics, rural sociology, ethnology, history, geography, food technology and nutrition. Traditional foods are mainly defined by human-related factors (Barham, 2003; Dixon, 1999). Several meanings of food products are closely related to tradition and authenticity:

- i) *Local Food* in UK is an understanding of traditional foods focusing on short distribution channels for locally grown products cheaper than those sold in supermarkets. The idea is to avoid wholesalers and their margins. Hence *local foods* are often related to consumers having low income.
- ii) *Locally Grown* in USA is a concept linked to direct sale from farmers' markets and is more oriented towards upper classes and "green" citizens as the claim is to reduce the food-miles. Close to *Locally Grown* is the concept of *Community Supported Agriculture* or *Box Scheme Delivery*, which is actually implemented in north-western Europe by some urban consumers mostly with higher education (Brown and Miller, 2008; Hardesty, 2008; Vogt and Kaiser, 2008).
- iii) *Typical food* is more an Italian concept depicting traditional foods produced in often well-identified regions and taking benefits from PDO or PGI labelling policy. Those products are very often considered as typical from a certain culture or a certain region and related to Mediterranean lifestyle. *Typical Foods* are often rooted to gastronomy and may be called *Specialty food products* in north-western Europe and USA. In some extend they are emblematic of a kind of resistance against the globalization trend acting into the food area.
- iv) *Regional food* is a meaning of traditional food shared in several countries such as Switzerland, France, Spain, Italy, Germany, Austria, where the regional fact is a still a vivid reality in both culture and food habits. As regional names are appealing for consumers looking for authentic food products instead of globalized industrial ones, opportunistic stakeholders try to use good notoriety of local names for food not necessarily produced in the region associated with the name. Hence a protection scheme is needed in order to avoid misuses and abuses misleading consumers. Consequently, *Regional food* is strongly related to the *Geographical Indication* labelling policy mainly applied in Europe. It is worth considering that *Protected Designation of Origin* (PDO) label guarantees that the concerned product is produced and processed and packed into its region of origin, while the *Protected Geographical Indication* (PGI) label guarantees that the concerned product is produced or processed or packed into its region of provenance (European Commission, 2006). An additional protection scheme is devoted for *Traditional Speciality Guaranteed* (TSG) which deals mainly with local meals benefiting from old and well

established notoriety. TSG highlights traditional character, either in the composition or means of production.

- v) *On-farm processed food* is mainly a French concept *On-farm processed foods* are considered as issued from knowledge-based practices, enhancing the role of tradition and culture within the preservation of biodiversity in food habits and healthy diets related to well-being of clients of the given niche market.
- vi) *Home-made or artisan-made food* is more a Scandinavian concept designating the same kind of traditional food described above. This includes the unknown side of food market which is self-consumption of products issued from the own garden or orchard of local households (Hamermesh, 2007). This last aspect may be of noticeable importance, especially for fruits & vegetables consumption, which might not be fully addressed by market structures in the WBC.

It is worth noting that the above proposed country-rooting of the different facets of traditional foods concept is only based onto the frequency of use of the relevant concept into the scientific literature and not into the gardening or cooking practices of inhabitants (Fonte, 2008).

Trade and export of traditional foods are deemed to be scarce according to the specificities of these products with respect to their cultural roots. Hence export of traditional foods is often provoked by immigrants' communities in foreign countries (Giraud, 2008).

Trend towards traditional foods

The appealing power of traditional food names leads to some allegations or misuse in the absence of clear regulation. For instance the wordings "traditional recipe", "old recipe" "produced since [year]", "genuine tang", "matured in [region name]" are used on labelling without any control whether they are proven or free allegation. The GIs protection scheme intends to avoid this kind of confusion by limiting the use of local name within the food branding to those products which are locally well documented since long time (one human generation). The PDO culture was genuinely located into the area under influence of the ancient Roman Empire.

Nowadays, PDO and PGI are spreading out of old Europe, since regulation 510/2006 allows the registration for non European products such as Coffee from Columbia or Nuoc Mam from Phu Quoc. PGI scheme is less restrictive and thus, provides good protection for locally rooted food products issued from medium or even large factories. On October 08 2009, excluding wine and alcoholic beverages, but not beer nor cider, 461 agricultural or sea products are registered within the EU PDO scheme, and 386 as PGI. Only 22 food products are registered as TSG into the EU database (http://ec.europa.eu/agriculture/quality/database/index_en.htm).

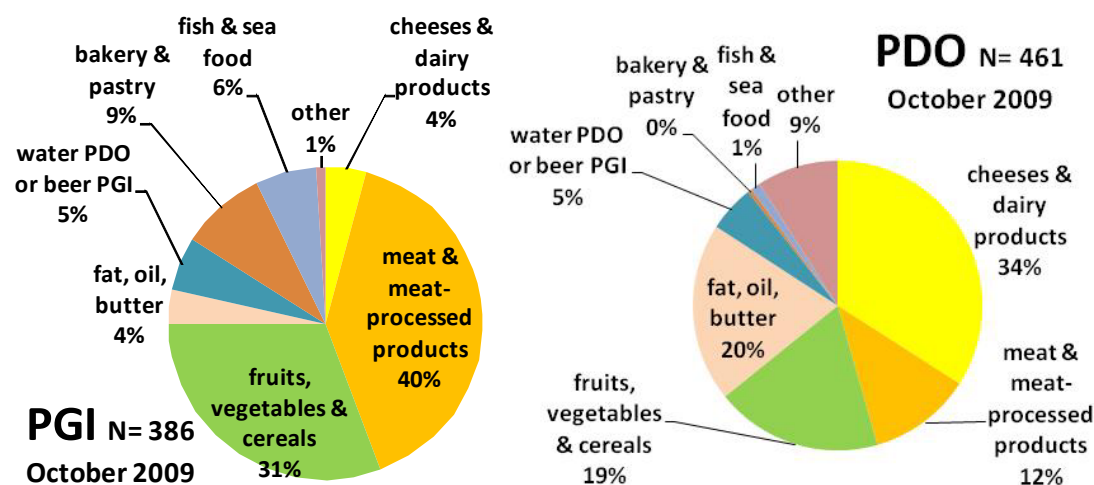


Figure 11 Products registered within the EU PDO Scheme

Nutrition & health a new challenge for traditional food products

Concerns about nutritional value of traditional foods have risen recently. Trichopoulou wrote into the proceedings of the EuroFIR 2007 conference that “*Traditional foods reflect cultural inheritance and have left their imprints on contemporary dietary patterns. They are key elements for the dietary patterns in different countries and consequently are important to accurately estimate population dietary intakes. However, this information is missing from most current national food composition databases. EuroFIR aims to enrich national food composition tables that lack nutrient data on traditional foods and to provide data on selected bioactive components. In this context, a common definition of traditional foods has been agreed upon for the classification of traditional foods in European food composition tables. A list of traditional foods, for which analytical nutritional and bioactive data will be provided, has been developed*” (Trichopoulou et al., 2007).

This nutritional concern is congruent with results very recently published on consumer sciences. Pieniak found that “general attitude towards traditional foods, familiarity, and importance of food naturalness emerged as drivers for traditional food consumption. Importance attached to convenience and health acted as direct barriers to traditional food consumption, whereas importance of weight control emerged as an indirect barrier through lowering general attitude toward traditional foods” (Pieniak et al., 2009).

5.4.2. Objectives and methods

Contribution to knowledge on traditional food products

Scientific publications on traditional foods are mainly coming from rural sociology rather than agricultural economics and agro-food marketing academic fields (Tregear et al., 2007; Van Ittersum et al., 2003; Jordana, 2000). Some publications are also coming from human geography and more recently from nutrition (Trichopoulou et al., 2007; Ricketts Hein, 2006). Most of articles are based on qualitative data analysis and few are measuring or modelling consumers' behaviour through quantitative data. Self consumption of locally grown or processed food products might be an issue when estimating traditional food consumption in the WBC, or screening scientific literature on that purpose. This fully justifies the attempt of quantitative survey in the WBC with respect to traditional foods that is planned into WP8 of FOCUS-BALKANS. The first stage might be the screening of WBC publications database for a better identification of articles clearly related to traditional food consumption.

WP8 intends to clarify whether traditional food products are processed products based on ancient cuisine and old recipes rather than raw foodstuffs. WP8 will also better document the relevance of traditional food products in WBC based on local sourcing or cultural rooting, or are eaten for daily food versus festive one. A key section of WP8 issues will be devoted to important debate on local names protection versus free market, ie PDO-PGI regulation or free branding allegations. Another section will explore the upcoming debate on health versus culture, nutrition or pleasure, which is crucial for future of traditional food products, not only in the WBC.

Contribution to know-how on consumer survey analysis

FOCUS-BALKANS will take the opportunity of WP8 to implement the transfer of results from qualitative survey to quantitative one by using results from Focus Groups discussion when designing the Conjoint Analysis experimental protocol. WP8 will be also a chance for practical training on cluster analysis by testing segmentation methods such as k-means analysis or decision tree modelling. Within the hypothesis of asymmetry of information, WP8 will focus on consumers decision making process used for choosing or not traditional food products. The MODE model, Motivations and Opportunities as DEterminant of behaviour (Fazio and Towles-Schwen, 1999; Fazio, 2001) will be tested as a possible implementation of theoretical framework identified into DL 1.2. WP8 intends to contribute at measuring how attitudes undermine behaviours under context and affect effect. Reference to ELM model, Elaboration Likelihood Model of persuasion, (Petty and Cacioppo, 1986; Wilson, 2007) might be done when defining consumers' attitudes towards traditional food products.

Responsibilities and involvement

WP8 will start on January 2010. WP8 responsible is Enita Clermont, with help of Univ. of Ljubljana, Univ. of Newcastle and Univ. of Parma. Each partner is involved in WP8, apart LEI and Ecozept. According to DoW, Univ. of Belgrade will give substantive help for WP8 activities implementation.

5.5. Consumer quantitative survey

5.5.1. Referent surveys

There are lot of quantitative social and marketing researches where usage and attitudes related to food are examined.

When publicly available surveys in WBC are in question, the data related to food are collected through module of diet habits in National Health surveys (done by WHO methodology in some of the WB countries). These kinds of data are of course very often collected in marketing researches as well, but these surveys, by the rule, are not available for broader public.

Some of the standardized measurements/questionnaires of food habits and attitudes are the following scales (De Graaf, unpublished):

- Health consciousness / nutrition behaviour which consists of three modules : Health consciousness scale (HCS), Health locus of control (HLC) and Health belief model (HBM)
- Food choice questionnaire (FCQ) which has nine dimensions: health, mood, convenience, sensory appeal, natural content, price, weight control, familiarity, ethical concern, 36 items in total)
- Taste and health attitude questionnaire (HTAS) consists of 3 health interest and 3 taste interest mini-scales: general health interest, light product interest, Natural product interest, Craving for sweet foods, Using food as reward and pleasure)

Food neophobia scale (FNS) is designed to predict personal willingness to try new food and consists of 10 items/Variety seeking scale (VARSEEK-*scale*) with respect to foods, is based on the theory that people need a certain state of arousal and that each individual has Optimal Stimulation Level and, consequently, that desire for variety in consumption is of intrinsic character.

In addition, we also recommend the scale on impulse behaviour, since, as was previously said, impulse purchase is very important when food consumption is in question. International valid and well-tested scale on impulse behaviour is – Compulsive Buying Scale (CBS), 7-item scale developed by Faber and O'Guinn in 1992.

The information about food consumption in WBC countries are collected on yearly level by Household Budget Surveys and also in some years by LSMS (Living Standard Measurement Study). This concerns research developed by the World Bank which is now implemented in more than 60 countries. Since the 7day-diary (7DD) method is used in these two surveys, the data are based on actual behaviour. For food consumption investigations also very often are used food frequency questionnaire (FFQ) and 24h recall questionnaire, both based on past experience (in case of 24h recall the respondent speaks about the food consumption in previous 24 hours, while in the FFQ the respondent speaks about the average frequency of specific food items consumption).

5.5.2. Objectives, Models and Methods

The main aim of quantitative research of WP9 is analysis of the drivers and determinants of food consumption behaviour in the WBC. The quantitative aspects that are identified in the four qualitative consumer studies, WP 5,6,7,8 will be measured by quantitative survey which will be conducted in all six countries of interest.

The quantitative research of WP9 is consists of two parts:

Research on consumer perception, attitudes and behavior related to food (What type of questions and scales will be used hasn't yet been defined, and it will depend on the input from qualitative studies from WP5 to WP8)

Research towards traditional and local food products which will be done by *Conjoint analysis*.

The main aim of quantitative research in Focus Balkans project is the analysis of the drivers and determinants of food consumption behaviour in WBC. The quantitative aspects that will be identified in the four qualitative consumer studies, WP 5,6,7,8, will be measured by quantitative survey which will be conducted in all six countries.

Quantitative research would be focused on consumer perception, attitudes and behavior related to food.

Data collection would be ad hoc face-to-face survey; Interviewing will be performed at respondents' home; Questionnaire size will be approximately 20 minutes; Sample size would be 500 per country, 3000 in total with citizens of WBC aged 15+ as targeted population.

Sampling frame will be based on the data from Census, vital statistics and the migration data, as well as estimates of population and households for 2007. Sample type will be stratified 3-staged probability sample. Sampling stages: Polling station territory – approximately size of 200 HH (PPS with probabilities proportional to size); Households by random route technique starting from the given addresses; Households member with same probability – Kish scheme. 10 respondents per sampling point will be implemented in the survey. Stratification will be done according to: type of settlement – urban/rural, six geo-economical regions.

Fieldwork control will be done on at least 12% of totally interviewed in all strata proportionally to sample size, and logic and consistency control of collected data is performed in 100%

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