Consumers’ expectations towards traditional foods

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Experiences from Truefood
Pan-European Truefood
Focus group and survey research

Map of Europe showing the number of respondents from different countries:
- Brussels: n=826
- Norway: n=798
- France: n=801
- Spain: n=800
- Switzerland: n=800
- Hungary: n=803
1. Qualitative insights

1.1 Definition of traditional foods from focus groups

“A traditional food product is … a product frequently consumed or associated with specific celebrations and/or seasons; normally transmitted from one generation to another; made accurately (made with care) in a specific way according to the gastronomic heritage; with little or no processing/manipulation; distinguished and known because of its sensory properties and associated with a certain local area, region or country.”

Guerrero et al. (2009) Appetite
1.2 Association test

The concept “traditional”:

- **Habitual consumption**: habit, often consumed, daily ...
- **Special occasions**: Christmas, holiday, feast ...
- **Specific origin**: country, local, farm, rural ...
- **Made in a specific way**: elaboration, simple, recipe, home-made ...
- **Transmitted from one generation to another**: ancestors, heritage, family
- **Known for sensory properties**: tasty, flavour, good taste ...
- **Related with health**: healthy, natural, nutritious, fatty, unhealthy ...
- **Expensive, good quality, availability** ...
- **Providing diversity**: variety, choice ...

Less positive associations: old-fashioned, boring, fatty

Guerrero et al. (2010) *Food Qual Prefer*
2. Quantitative results

2.1 Image profile of traditional food consumers

- Old-fashioned people
- Family with children at home
- Housewife
- People living in the countryside
- People loving national/regional cuisine
- People who enjoy cooking

- Traditional way of life
  - stability rather than change
  - family role model

- Importance of locality
- High involvement with food

Vanhonacker et al. (2010) Brit Food J
Image profile of **non-traditional** food consumers

- Busy people (occupied)
- Convenience-oriented people
- Singles (living alone)
- Frequent travellers

- Modern way of life
  - low time-availability
  - busy, hasty
  - no time for cooking on the road

Vanhonacker et al. (2010) *Brit Food J*
### 2.2 General image of traditional food products

<table>
<thead>
<tr>
<th>Very negative</th>
<th></th>
<th>Neither negative nor positive</th>
<th></th>
<th>Very positive</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>5.51</td>
<td>5.62</td>
<td>5.93</td>
<td>5.71</td>
<td>6.01</td>
</tr>
<tr>
<td>6.04</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Lengard et al. (2011) *Food Qual Prefer*
2.3 Definition of traditional foods

Pan-European consensus:
- Well-known
- Grandparents already ate
- One can eat very often
- Seasonally dependent
- Specific sensory properties
- Authentic raw material, recipe, process

Cross-cultural differences:
- Contain a story
- Local
- Natural, Low processed
2.4 Segmentation based on consumers’ definition of TFP

<table>
<thead>
<tr>
<th>Traditional food products are …</th>
<th>AVG</th>
<th>USUAL</th>
<th>AUTH</th>
<th>INHER</th>
<th>Sample mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/ Well-known</td>
<td>0.29</td>
<td>0.95</td>
<td>-0.58</td>
<td>1.06</td>
<td>0.40</td>
</tr>
<tr>
<td>2/ Can often eat</td>
<td>0.17</td>
<td>0.72</td>
<td>-1.73</td>
<td>0.32</td>
<td>-0.04</td>
</tr>
<tr>
<td>3/ Grandparents already ate</td>
<td>0.35</td>
<td>1.10</td>
<td>0.39</td>
<td>1.17</td>
<td>0.66</td>
</tr>
<tr>
<td>4/ Natural, low processed</td>
<td>-0.10</td>
<td>-0.12</td>
<td>-1.17</td>
<td>-1.81</td>
<td>-0.66</td>
</tr>
<tr>
<td>5/ Dependent on the season</td>
<td>0.36</td>
<td>0.77</td>
<td>0.13</td>
<td>-0.61</td>
<td>0.24</td>
</tr>
<tr>
<td>6/ Local</td>
<td>-0.24</td>
<td>-0.16</td>
<td>-0.03</td>
<td>-1.63</td>
<td>-0.41</td>
</tr>
<tr>
<td>7/ Specific sensory properties</td>
<td>0.17</td>
<td>0.20</td>
<td>0.48</td>
<td>0.24</td>
<td>0.25</td>
</tr>
<tr>
<td>8/ Special occasions</td>
<td>-0.02</td>
<td>-2.29</td>
<td>-0.13</td>
<td>-0.05</td>
<td>-0.56</td>
</tr>
<tr>
<td>9/ Contain a story</td>
<td>-0.12</td>
<td>-1.10</td>
<td>0.57</td>
<td>-0.01</td>
<td>-0.19</td>
</tr>
<tr>
<td>10/ In grandmothers way</td>
<td>-0.10</td>
<td>-0.23</td>
<td>0.45</td>
<td>0.50</td>
<td>0.08</td>
</tr>
<tr>
<td>11/ Authentic recipe</td>
<td>-0.08</td>
<td>0.27</td>
<td>0.77</td>
<td>0.62</td>
<td>0.28</td>
</tr>
<tr>
<td>12/ Authentic origin of raw material</td>
<td>-0.25</td>
<td>0.05</td>
<td>0.50</td>
<td>0.24</td>
<td>0.04</td>
</tr>
<tr>
<td>13/ Authentic production process</td>
<td>-0.44</td>
<td>-0.16</td>
<td>0.37</td>
<td>-0.03</td>
<td>-0.15</td>
</tr>
<tr>
<td>Segment size (% of sample)</td>
<td>41.2</td>
<td>22.7</td>
<td>19.2</td>
<td>16.9</td>
<td></td>
</tr>
</tbody>
</table>

Vanhonacker et al. (2010) *Agribusiness*
Segment profiling

• **S1: Traditional = MANY DIFFERENT THINGS**
  • No explicit definition of traditional foods
    ⇒ no strong or no explicit opinion, confusion?
    ⇒ very wide and quite generic concept
  • France, Italy, Spain

• **S2: Traditional = THE USUAL**
  • Mainly Belgium and Spain, few Norwegians and Poles
  • Older age
  • Rural place of residence
  • Supermarket buyers
  • TFP = healthy, safe, nutritious, widely available, convenient
    ⇒ every day meal

Vanhonacker et al. (2010) *Agribusiness*
**S3: Traditional = AUTHENTIC**
- Poland and Italy, few Belgians
- Urban place of residence
- Specialty shops and market places
- TFP = unique taste, high quality, supportive for local economy
- TFP ≠ healthy, cheap, consistent quality, convenient
- Most averse towards innovation in TFP
  ⇒ typical authentic artisanal products

**S4: Traditional = INHERITED**
- Mainly Norwegian consumers
- Well-known, Grandparents, Grandmothers’ way
- Not local

Vanhonacker et al. (2010) *Agribusiness*
2.5 Consumer awareness of EU geographical origin labels

%, $n = 800$ consumers per country (2007)

PDO = Protected Designation of Origin
PGI = Protected Geographical Indication
TSG = Traditional Specialty Guaranteed
### EU quality policy for agricultural products

**Protected geographical indications and origin labels**

#### Belgium

<table>
<thead>
<tr>
<th>Benaming</th>
<th>Type aanvraag</th>
<th>Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vlaams-Brabantse tafeldruif</td>
<td>BOB</td>
<td>11/07/2008</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Fromage de Herve</td>
<td>BOB</td>
<td>02/07/1996</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Beurre d’Ardenne</td>
<td>BOB</td>
<td>13/11/1996</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Brussel se grondbottenf</td>
<td>BGA</td>
<td>05/08/2008</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Pâte gaumais</td>
<td>BGA</td>
<td>10/10/2001</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Geraardsbergse matentaart</td>
<td>BGA</td>
<td>18/02/2007</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Gentse azalea</td>
<td>BGA</td>
<td>13/04/2010</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Lambic, Gueuze-Lambic, Gueuze / Lambiek, Gueuze-Lambiek, Ge (...)</td>
<td>GTS</td>
<td>07/05/1996</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Kriek, Kriek-Lambic, Framboise-Lambic, Fruit-Lambic / Krie (...)</td>
<td>GTS</td>
<td>07/05/1998</td>
<td>Geregistreerd</td>
</tr>
<tr>
<td>Faro</td>
<td>GTS</td>
<td>21/11/1997</td>
<td>Geregistreerd</td>
</tr>
</tbody>
</table>

**Source:** EU DOOR (2011), [http://ec.europa.eu/agriculture/quality/door](http://ec.europa.eu/agriculture/quality/door)
2.6
Consumer acceptance of innovations in traditional foods

Kuhne et al. (2010) *Food Qual Prefer*
Acceptance of health-related innovations in TFP

- New process improving safety
- Reduction of fat content
- Using organic raw materials
- Reduction of sugar content
- Reduction of salt content
- Addition of ingredients providing additional health benefits
Acceptance of product type and packaging innovations in TFP

- Availability all over the year
- Individual portions
- Package deal
- Frozen food
- Pre-cooked food, ready-to-eat-dishes
- Packaging preserving sensory quality
- Recloseable packaging
- Packaging that can be used in (microwave)oven
Acceptance of marketing-related innovations in TFP

- Label signalling origin
- Marketing with a strong brand name
- Manufacturer
- Take-away from specialty shop
- Home delivery
- Vending machines
Acceptance of product development innovations in TFP

- More variety in the offer
- New combinations of ingredients
- Diversification of shapes and/or texture
3. Conclusions

- Consumer oriented definition of traditional foods
- Associations and image profiles of traditional foods
- Overall positive image of traditional foods
- Pan-European market segments
- Awareness of geographical indications
- Innovations compatible with traditional foods
Consumers’ expectations towards traditional foods

THANKS FOR YOUR ATTENTION

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