How much do consumers know about mountain food products: is there a need for labelling?

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Abstract

Slovenia is predominantly a mountainous country, where farming conditions can be considered as unfavourable. Slovene mountain agriculture can hardly compete with agricultural practice of more productive areas. A solution could be to develop the concept of "mountain food products" in order to promote and protect mountain agriculture. This paper arises out from surveys implemented in the frame of the European project EuroMARC. It presents some characteristics about consumers’ perceptions of mountain food products, obtained during focus groups and consumer survey. Shelf surveys recorded by diverse retailers complete the analysis. Results show that respondents have a positive image of mountain food. They associate it with the local origin and mainly expect to buy it through direct sales. These surveys also highlighted insufficient marketing and communication around these products. The creation of a label to protect and certify mountain food, which is positively accepted, could constitute a base for holistic marketing development and promotion improvement.

Keywords: mountain quality food products, consumers’ perception, shelf survey

Introduction

With half of its surfaces situated in the Alps and more than 75% of its territory classified as Less Favoured Areas, Slovenia is characterized by unfavourable conditions for farming. This paper arises out from surveys implemented in the frame of the Euro-MARC project (European project co-financed by the European Union sixth Framework Program for Research and technological Development). EuroMARC aims at finding possible ways of adding values to mountain food products, thus contributing to the survival and management of mountain diversity – biological, rural, cultural and economic. (EuroMARC, 2007). The European Charter for Mountain Quality Products (Euromontana, 2005) gives the following definition: “A mountain-quality food product (MQFP) is either a fresh foodstuff produced in a mountain area or a processed food product that uses raw materials produced / grown in a Mountain area (e.g. mountain areas identified by the Member States within the framework of Regulation EC 1257/99), (this does not include those materials which, for natural reasons, cannot be produced there). If the product is processed, key processing stages are located in the Mountain area. Some processing stages may be done outside the Mountain area due to specific skills or tradition.”

This contribution presents results obtained through focus groups and quantitative survey, achieved in order to determine some patterns of consumers’ perceptions of mountain quality food products (MQFP). Shelf surveys complete these results with a description of the marketing of these products.
Material and methods
A series of focus groups were implemented as an initial exploratory source to obtain early elicitation of wording used by consumers when thinking about mountain food products (Amilien et al., 2007 and 2008). In Slovenia, 3 focus groups were implemented (2 in mountain areas, 1 in non mountain area). Based on the results of the focus groups, a questionnaire was composed, similar for the 6 countries participating in the EuroMARC project, but adapted to the Slovene context. It consisted of 16 questions related to various topics, e.g.: understanding of the terms “mountain food product” and “mountain quality food products” (MQFP), purchasing habits of MQFP, attributes related to MQFP, etc.
The sample is constituted of 302 persons, aged 18 to 45. Half of them are habitants from mountain areas. Half of the respondents are female, and half male. Young respondents predominate in the sample (37 % of 18-25, 38% of 26-35, 25% of 36-45). Most of them have a relatively high level of education: more than 25% have completed college, faculty or university and almost one third have completed 4 years secondary school. On the other hand, almost one quarter of the respondents have not completed high-school or college, faculty and university. 48.7% of the respondents are employees (clerks, workmen, intermediate professions/technicians), 4.9% are craftsmen, traders or managers, and 5.9% are unemployed.

In parallel, 90 shelf surveys were implemented in order to study how mountain quality food products are marketed. 44 different outlets selling these products were visited: inside and outside mountain areas. A shelf is defined as a group of similar products in the store (dairy products, meat products). For each shelf studied at most 5 products were recorded in a grid of questions related to product attributes, product display and customer communication. Observations were made in 12 supermarkets, 9 farmers shop, 11 farmers’ markets, 10 speciality shops and 3 factory outlets. A total of 364 products were recorded in 90 shelves.

Results and discussion
What are mountain (quality) products?
Two open questions aimed at finding out which products respondents associate with the term “mountain (quality) food products”. Therefore respondents were firstly asked to quote up to three different products they would call as “mountain food products”. The answers (N=651) were classified in 5 main categories. Results show that respondents mostly associate mountain food products with dairy products (83.6% of the answers). Meat products, fruits/vegetables/herbs and bakery/pastry represented only 11% of answers. The category “other” represents almost 5% of the responses and notably includes answers such as honey, water and other.

Afterwards, respondents were asked to quote up to three “mountain quality food products”. This question was used to find out whether the word “quality” in a particular designation could influence the perception of consumers. The results again suggest strong predominance of dairy products (78.7% of quotations). Thus the terms “mountain food products” and “mountain quality food products” seem to be similar to the respondents (Wilcoxon test shows no significant difference in two distributions; P=0.848 > 0.05). The use of the term “quality” did apparently not influence on the perception of respondents.

The survey of shelves in different retail formats in Slovenia indicate that the availability of MQFP responds to the findings of web survey as described above: dairy products predominate; they represent 74.5% of the products recorded on shops shelves and meat products follow with recorded share of 25.5%. These findings suggest that since MQFP in
dairy sector are the most available in Slovenian shops, their perception is the most adopted in the mind of average Slovenian consumer.

**Relevant attributes for mountain quality food products**

The table 1 shows how respondents ranked statements related to mountain food products, from 1 “strongly disagree” to 5 “strongly agree”.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Mean</th>
<th>SD</th>
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<tbody>
<tr>
<td>A. Mountain products are connected to specific cultural areas</td>
<td>3.97</td>
<td>0.96</td>
</tr>
<tr>
<td>B. Mountain products are produced in a traditional way by small scale</td>
<td>4.03</td>
<td>0.94</td>
</tr>
<tr>
<td>producers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Raw materials from mountain areas can be processed into mountain</td>
<td>3.43</td>
<td>1.20</td>
</tr>
<tr>
<td>products also outside mountain area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Mountain products are not required to be healthy products</td>
<td>3.26</td>
<td>1.16</td>
</tr>
<tr>
<td>E. The main raw material of mountain food products does not necessarily</td>
<td>2.84</td>
<td>1.30</td>
</tr>
<tr>
<td>need to come from a mountain area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. Mountain products support local employment</td>
<td>3.90</td>
<td>1.06</td>
</tr>
<tr>
<td>G. Mountain products are produced and processed in an environmental</td>
<td>3.96</td>
<td>0.92</td>
</tr>
<tr>
<td>friendly way</td>
<td></td>
<td></td>
</tr>
<tr>
<td>H. Mountain products have to comply with industrial standards of hygiene</td>
<td>4.48</td>
<td>0.87</td>
</tr>
<tr>
<td>I. Mountain products are part of the cultural identity of local</td>
<td>4.28</td>
<td>0.89</td>
</tr>
<tr>
<td>communities</td>
<td></td>
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</table>

The table highlights that respondents attach the most importance to the respect of hygiene standard of mountain products (mean 4.48). They agree with the fact that mountain foods are traditional products linked with the cultural identity of local communities and specific cultural areas (Statement A, B and I). Moreover, the low standard deviations of these statements suggest that respondents are quite unanimous regarding values associated to mountain products. They are quite aware of the environmental friendly aspect of mountain food production (statement G). The statement E has the lowest mean, underlining that respondents relatively do not agree with the fact that mountain products can be processed from raw material produced outside mountain areas.

The age of the respondents influences the image they have on mountain quality food, especially for the statements F and G. In addition, young people (aged 18 to 25) feel less concerned as regards support to local employment than older respondents. Employed respondents are more aware about the link between mountain quality food and the local economy and cultural identity. In general, these results underline that respondents have a relatively positive image of the mountain food products. Without any knowledge of the concept of MQFP as defined in the European charter (Euromontana, 2005), they intuitively understand it.

**Availability of MQFP**

Focus group discussions suggested that participants from mountain areas often get mountain quality food products from acquaintances or even produce them by themselves. On the other hand, informants from non mountain area explained that in the conventional retail channels where they usually purchase food, MQFP are unavailable or not displayed separately. The quantitative survey confirmed the focus groups’ results, as underlined by the answers of respondents regarding the availability of MQFP.
Most of the respondents, declaring purchasing their food in conventional channels (like hyper- or supermarkets), are expecting to find MQFP outside these channels: 66% of the answers mention availability directly from the producer (including own, family’s and friends’ production). Specialized shops represented 16% of the answers. Conventional channels represent 17% of the total answers. Therefore, these results emphasize the fact that in the mind of the respondents, MQFP are strongly associated to their local origin and to direct sales.

Place of residence significantly influences on the answers concerning MQFP availability. Respondents, living in non mountain area, perpect availability of MQFP in big retail channels (like mega/hypermarket) in larger extent compared to the mountain area residents, which emphasise the importance of availability directly from the farm.

**Communication to consumers**

Focus group results underlined that consumers ask for more information on MQFP. They expected more details about mountain origin and more explicit relationship between the image/logo and the product itself as well as a clearer presentation of quality characteristics on the labels. The quantitative consumer survey (n=300) underlined that 91.7% of the respondent think that there should be a governmental/EU label to certify that these products really are mountain products.

Also according to the shelf survey (table 2), the customer communication of mountain products in present form in Slovenian shops is insufficient.

**Table 2: Percentage of positive answers regarding MQFP’ display in the outlets visited and customer communication on the products recorded (source: Shelve survey)**

<table>
<thead>
<tr>
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<th>% of positive answers</th>
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<tbody>
<tr>
<td><strong>Product display</strong></td>
<td></td>
</tr>
<tr>
<td>Mountain products together in the shelf with similar non-mountain products</td>
<td>62.4%</td>
</tr>
<tr>
<td>Mountain product displayed with other mountain products of the same type*</td>
<td>69.8%</td>
</tr>
<tr>
<td>Special mountain product display sign (on shelf or in shop)</td>
<td>0.0%</td>
</tr>
<tr>
<td><strong>Customer communication</strong></td>
<td></td>
</tr>
<tr>
<td>“Mountain” in the name?</td>
<td>1.4%</td>
</tr>
<tr>
<td>“Mountain” represented by symbol/image?</td>
<td>28.8%</td>
</tr>
<tr>
<td>“Mountain” in product description?</td>
<td>1.9%</td>
</tr>
<tr>
<td>Mountain provenance of the product prominently displayed on the product?</td>
<td>9.6%</td>
</tr>
<tr>
<td>Description of the mountain region of origin?</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Note: But not displayed as “mountain”

As shelf survey shows, only a third of 364 products recorded have a mountain symbol or image. The term “mountain” is predominantly not used in the name of the products, and “mountain” is not mentioned on the packaging. Mountain provenance is prominently displayed on less than 10% of the products studied. The outlets mostly do not organize any type of promotion for MQFP, and special mountain display signs are not recorded in any shop or shelf.

**Conclusion**

Focus groups and quantitative consumer survey underlined that informants and respondents have a positive perception of mountain products. Even if the concept of MQFP
is unknown in Slovenia, consumers interviewed seem to intuitively know what the main characteristics of these products are. Results showed that respondents associate MQFP with short food supply chains and believe these are mostly available in direct sale. The place of residence, age, and occupation also influence the perception of these products and their availability.

The lack of communication and information about these products, highlighted during focus groups discussions, was confirmed by the shelf survey. Observations in diverse outlets in Slovenia underlined a lack of information on the mountain products’ characteristics and origin as well as insufficient marketing and promotion. More than 90% of the quantitative consumers’ survey respondents positively accepted the idea of a governmental and/or European quality label to certify that mountain quality food products really are mountain products. Such a label, associated with appropriate promotion, could increase the consumers’ recognition of mountain food in Europe.

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References


