European Commission

THE FIFTH FRAMEWORK PROGRAMME 1998-2002

QUALITY OF LIFE AND MANAGEMENT OF LIVING RESOURCES

"Marketing Sustainable Agriculture: An analysis of the potential role of new food supply chains in sustainable rural development"

SUS-CHAIN

QLK5-CT-2002-01349

Desk study on consumer behaviour towards sustainable food products

National report – UK

By

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SUS-CHAIN deliverable no. 9.2

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UK

SUS-CHAIN WP3 National Report (deliverable 9.2)

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Objectives of WP3

Main objective:

To identify strategies to stimulate sustainable food consumption.

Secondary objectives:

1. To understand the decision making process of consumers of sustainable products.
2. To identify barriers to the consumption of sustainable food products.
3. To identify possibilities to eliminate these barriers.

Part I: Defining the sustainability of food products

In the wake of the series of crises within the UK agro-food system, culminating in BSE and foot and mouth, the notion of sustainable development has become of more widespread interest within the food supply chain (FSC) as the latter's components have come under increasing scrutiny. There is recognition that the impact of the food sector extends beyond what happens on the farms themselves, and incorporates complex relationships between rural development, food production, processing, distribution and consumption at a variety of scales. Issues of provenance, and the environmental, economic and social costs/benefits associated with its production and consumption, have necessitated a critical appraisal of what is meant by sustainable agriculture and sustainable food production.

The Sustainable Development Commission (SDC) is an independent advisory body set up by the Government to promote the delivery of sustainable development across all sectors of society, and it has developed a vision for sustainable agriculture that recognises a wide range of issues and objectives, including the role of farming within rural communities and economies; animal welfare; environmental protection; and the development of local food markets. Drawing on the original Brundtland Commission definition (WCED 1987), the SDC defines sustainable agriculture as "agriculture that contributes to the overall objectives of sustainable development – to meet the needs of the present without compromising the ability of future generations to meet their own needs" (SDC 2003b: 1). As such, it has developed the following objectives for sustainable agriculture within the UK, namely to:

- Produce safe, healthy food and non-food products in response to market demands, now and in the future;
- Enable viable livelihoods to be made from sustainable land management, taking account of payments for public benefits provided;
- Operate within biophysical constraints and conform to other environmental imperatives;
- Provide environmental improvements and other benefits that the public wants - such as re-creation of habitats and access to land;
- Achieve the highest standards of animal health and welfare compatible with society's right of access to food at a fair price;
- Support the vitality of rural economies and the diversity of rural culture;
- Sustain the resource available for growing food and supplying other public benefits over time, except where alternative land uses are essential in order to meet other needs of society.

However, the SDC acknowledges that sustainable agriculture in the UK only partly addresses the impact that the FSC can have on sustainability issues, and recognises the need to understand the impact of our consumption practices more broadly. This includes: the transportation of food, both within the UK, but also on an international basis; the inclusion of ethical considerations, such as those addressed within the fair trade movement; and the growing significance of transparency and provenance in the provision of food, and the opportunities this offers those rural areas increasingly marginalized by global competition. This last point has become increasingly important since 2001, as worries over the environmental impacts of farming have been matched by the dire economic state of many farm businesses, and the implications this has for the social and cultural sustainability of rural areas more generally. Clearly, farming is no longer central to many rural economies, but agricultural initiatives can still have a considerable impact on the wider (and sustainable) development of rural economies and communities (SDC 2003b). Within the academic literature this element of the sustainability of food products is discussed in terms of the 'cultural economy', and the valorisation of local/indigenous resources (Ray 1998). In this respect, food products can have an important role to play, in that there is an increasingly widespread assumption "that 'locally produced' food is of a higher quality than 'global' food" (Banks and Bristow 1999: 319).

Despite the growing significance of 'ethical foods' within UK FSCs, it is acknowledged as problematic to define exactly what is meant by the term in that, as suggested by Mintel, referring to particular foods in this way does not mean that 'conventional foods' are necessarily unethical. Mintel suggest that 'ethical foods' have ethical attributes in relation to three issues: increasing the incomes of disadvantaged communities; animal welfare; and environmental sustainability. Clearly, these are disparate ambitions, and it may be that ethical foods do not fulfil all three ambitions on each occasion. Fair trade produce, for example, may be transported over long distances, meaning that in some respects they are not 'environmentally friendly'. Similarly, although organic production may be ethical in relation to animal welfare, or perhaps environmental impacts, the welfare of workers in the production process may not have been considered (Mintel 2001a).

There is also a strong lobby in the UK, which is intent on promoting 'local food systems' as a 'sustainable' antidote to the 'unsustainable' globally based system. This approach is well summarised in the recent report by Lucas and Jones (2003: 5), which describes a sustainable food supply as: "the provision of nutritious, affordable and health-enhancing food products to all, providing security and reasonable returns for the food producer while minimising the associated environmental impacts". The report insists that when assessing the sustainability of a particular food product or system, the whole FSC needs to be assessed. Elements highlighted within the report include: incorporating the true costs of transporting food in terms of the energy used and the associated externalities; and reconnecting the producers and consumers of food, thereby improving the transparency of its provision.

Part II: General food consumption trends

Within the overall debate about the sustainability of FSCs, there is growing recognition of the importance of consumption generally to the development of sustainable societies. In pursuit of its overall remit to increase the delivery of sustainable development, the SDC has conducted a review of the existing literatures on the complexities of the 'sustainable consumption' debate. Within this debate are differences over the balance between consuming less, or consuming differently. The SDC analysis suggests that the current UK institutional emphasis is on the latter, and it highlights the importance of understanding how consumer behaviour might be influenced and the necessary lifestyle changes brought about. They also suggest that the current debate cannot be understood in isolation from the older multi-disciplinary literatures on consumers and their consumption behaviours, including those within psychology, sociology, social philosophy, anthropology, and economics (SDC 2003a).

Consumption has been viewed in terms of display and status seeking for over a century, within such socio-economic discourses as 'conspicuous consumption' and 'positional goods'. However, more recent work suggests that these elements of consumer behaviour have perhaps been over-emphasised, even though there is still a general recognition that the consumption of goods can be of symbolic importance to consumers, including the construction of personalised identities and the communication of affiliation to a particular ideal or ideals. This is certainly the case with food, a point which is strongly made by Bessière (1998: 24), who bemoans the "anonymity of current eating [as being] the result of nutritional industrialisation, fewer structured meals, random snacking, an impoverished culinary legacy and a greater gap between farmer and consumer". She goes on to suggest that "processed food is…devoid of tradition and identity: functionalised, standardised and re-composed 'mass' foodstuffs, such as a quick sandwich or a Big Mac, [which] merely fulfil biological needs in the manner that a vitamin supplement might satisfy a deficiency".

Coupled with the symbolic importance of food and consumables generally, is a recognition that everyday consumption practices are more prosaic than that, driven by convenience, habit, practice and "individual responses to social and institutional norms" (SDC 2003a: 3). Within this latter conception, the consumer is seen to be 'locked-in' to certain consumption practices, over which they have very little individual control. This would suggest that consumption practices are likely to be resistant to change, yet the diversity and complexity of the motivations involved means that in reality there is considerable scope for change. Change may come about as the result of the actions of a relatively few actors, which can then be disseminated to a wider audience by the involvement of the media/celebrities/government or other institutions. An important driver for change, particularly with respect to sustainability concerns, is the tendency towards reflexivity within a post-modern society, whereby society (or some elements thereof) actively reflects upon existing cultural norms. This collective cultural appraisal is then transferred to the level of the individual through narrative and discourse (SDC 2003a).

The notion of a 'reflexive consumer' has been utilised to refer to a consumer who is not a social activist, but someone who seeks to make their own individualised risk assessment (e.g. Almas 1999; Bonanno 2000; DuPuis 2000). This tendency has been accentuated by globalisation processes which have distanced the individual consumer from the social and environmental context of the goods they are buying, and reduced the capacity of nation states to exercise effective control the risks involved. It is particularly relevant, therefore, to understanding consumer behaviour in relation to the FSC in that consumers are increasingly interested in where food comes from and in having a closer relationship with the producer of that food. Indeed, Dupuis (2000: 289) argues that "food is a particularly important focus for reflexive consumers, since food consumption is a negotiation about what a person will, and will not, let into his or her body". The succession of food scares in the UK over the last decade or so have undoubtedly been a factor in raising the level of reflexivity amongst UK food consumers.

Nevertheless, concurrent with increased reflexivity amongst consumers within the UK FSC are increasing demands for convenience foods. In general, cooking as an everyday activity has fallen and there has been a decline in traditional mealtimes and a growth in informality, such as snacking, light meals, eating alone, and eating in front of the TV. Convenience is therefore a key driver of food choice, a trend which is likely to continue as young consumers take their habits into their older age, and one that the food industry needs to acknowledge and provide for (IGD 2002e; Mintel 2001b).

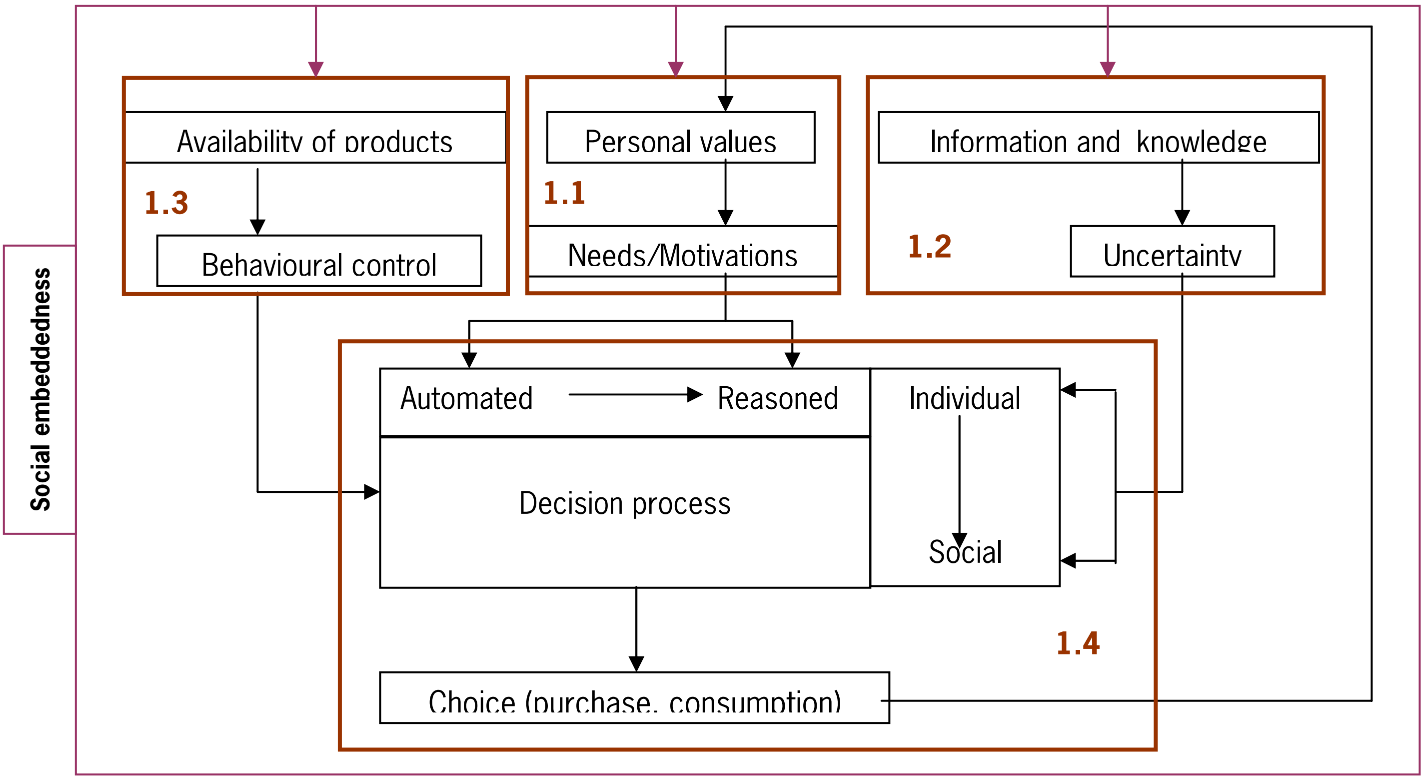
Part III: Consumer behaviour towards sustainable food products

Consumers of sustainable food products

The purchase and consumption of food products by consumers is the result of a complex decision-making process, which this section of the report helps to explicate. By way of context, the behavioural model utilised within the Belgium WP3 report (as work-package coordinators) is reproduced here.

Figure 1

Conceptual framework to investigate consumer behaviour towards sustainable food products, according to the consumer behaviour model of Jager (2000).



1.1 Consumers' values, needs and motivations

It has been suggested that there are two principal filters affecting consumer choices. Firstly, availability, and secondly the nature of the choice made in relation to the possibilities available. Inherent within this suggestion are notions of both rational and utilitarian choice, which necessitates an understanding of individual preferences and decision-making processes (Nygard and Storstad 1998).

Research conducted by the IGD (Institute of Grocery Distribution) suggests that consumer decisions about food and shopping are 'unashamedly selfish', based on value for money, health concerns, taste, appearance and convenience, rather than being driven by such altruistic motivations as animal welfare and care for the environment (IGD 2002b). This finding is endorsed by FSA (Food Standards Agency) research which also highlights price, convenience and value as the three primary issues for consumers when shopping for food, as well as keeping within the family budget, satisfying children's demands, and getting the family to eat a balanced diet (FSA 2000). Specifically in relation to the countryside, consumers seldom seem to make the link between the food they eat and the wider environment in which it is produced, usually taking the countryside and its associated benefits for granted (Enteleca 2001). Similarly, IGD research has found that few people consider the impact of what they decide to buy on anyone or anything but themselves or their family, usually making minimal connections between the food they buy and issues relating to the environment, animal welfare and fair trade. In addition, it seems that even where consumers are interested in production issues, this will not necessarily influence what they buy (IGD 2002g).

To some extent attitudes towards food varies between groups, with a minority enjoying all aspects of food preparation and consumption, and feeling confident they know about the food they are buying. At the opposite end of the spectrum are functional eaters who regard food primarily as fuel, are more reliant on convenience food, and tend to have an indifferent attitude generally towards food. In between these two extremes are the majority, who enjoy food and are receptive to new ideas but are often less confident about the origins and safety of the food they eat. 95% of consumers shop for food at supermarkets, principally due to the convenience offered, the range of products, and low prices. However, those consumers who do cook using raw ingredients are also likely to shop in specialist or local shops, with 36% of all consumers using local shops to buy some of their groceries (FSA 2002a; IGD 2002a).

Food scares, most particularly BSE and Foot and Mouth, are frequently linked by consumers to problems with intensive farming practices and, in particular, animal welfare issues. These concerns are exemplified in the growing numbers of vegetarians in the UK. There are now over 3 million, equivalent to 5.4% of the total population, an increase of 68% between 1989-2000, with a further 40-45% cutting back on meat consumption. Although many vegetarians do not eat meat for health reasons, perceiving a vegetarian diet to be less associated with obesity, heart disease and cancer, it is clear that many consumers become vegetarian for animal welfare reasons. Mounting concerns amongst vegetarians over GM produce has also led the Vegetarian Society to ally itself to the anti-GM food movement, and to make stronger linkages to organic food (Mintel 2000b).

The number of consumers concerned about ethical issues has increased in recent years. Mintel (2001a) suggests that consumers appear to be increasingly willing to take positive actions such as becoming vegetarian or paying more for organic produce, and less willing to take negative actions such as boycotting products from certain countries. 25% of consumers are considered to be ethical by Mintel, with a further 46% relatively ethical. The critical question, however, is the extent to which interested consumers turn their expressed interest into actual purchasing habits, in that even where consumers do have concerns about 'conventionally' produced food, their support for alternatives is usually conditional, often determined by price issues (IGD 2002a).

It can be argued that 'buying local' has become an ethical issue, incorporating a range of civic concerns that include; acknowledging local produce as being environmentally friendly, animal welfare friendly, British, good for the local economy and community, or organically produced (Mintel 2003). Research conducted by Weatherall *et. al.* (2003) found that most consumers would be prepared to try local foods (at least in principle), although (as indicated above) this was usually conditional upon it being measured against issues of price, convenience, accessibility and perceived quality (with the comparison usually being made to supermarket produce).

The recent growth in organic food consumption is thought to be driven largely by consumer concerns over food safety and health issues, whereby organic food is trusted to overcome some of the problems associated with BSE, GM produce etc., and Mintel (2001c) suggests that 71% of the adult population are now potential purchasers of organic foods. However, Harper and Makatouni (2002: 289-290) point out that "while health is undoubtedly the key motivator [for buying organic produce], ethical issues are important components of consumer motivation", even though the latter "may be double-edged [in that] organic production is perceived to improve the well-being of the animal and, therefore, the quality of the food product". In other words, this again suggests a health driver, even though it has been expressed in ethical terms. Harper and Makatouni (2002: 298) go on to argue that the "marketing of organic animal food products is essentially about health, but consumers want to express ethical concerns, as extensions of their self-image, however ambivalent and unresolved, [and that] marketers would do well to acknowledge this displacement of consumer concerns and devise strategies accordingly".

In their research into organic consumers in Australia, Lockie *et al.* (2002) found that on the whole they are just as busy and price sensitive as other consumers, although they are likely to weigh up the extra cost of organic produce against different parameters than the non-organic consumer, such as the environment. These findings accord with research into organic food consumers in the UK, where although environmental concerns are recognised as not being the primary driver of consumer behaviour, they are particularly important in relation to organic foods (Mintel 2001c). Nevertheless, Woodward and Meier-Ploeger (1999: iv) argue that in reality "self-centred factors such as health and taste are more important to more organic consumers that altruistic factors such as environment, animal welfare and social considerations". In other words, consumers will tend to buy organic produce for what it offers them personally in relation to the price paid, and numerous reports highlight price as the major barrier to increasing the quantity of organic produce sold to consumers (e.g. IGD 2002a). Its relatively higher price is also the reason why most buyers of organic food come from the middle and professional classes (38%) (Woodward and Meier-Ploeger 1999).

It is also apparent that a significant number of organic consumers would welcome an increase in 'organic convenience food', which would necessitate greater processing, packaging, centralisation, and the use of additives etc. (thereby destroying many of the 'quality' attributes originally ascribed to organic food). As such, many companies are now producing organic products that look and taste very much like 'conventional' products, raising the important question as to what consumers understand, or want, organic produce to mean. How do consumers weigh up the potentially conflicting motivations of convenience, price, and processed food versus more ethical considerations? Woodward and Meier-Ploeger (1999) suggest that consumers are seldom driven beyond the notion of reduced chemicals in organic produce, often failing to interact with the wider philosophies within the organic movement (Woodward and Meier-Ploeger 1999).

Consumers are often discussed in somewhat abstract terms and yet, as Woodward and Meier-Ploeger (1999) argue, they are anything but an amorphous mass, exhibiting contradictions, conflict and uncertainty in many of their purchasing decisions. Consumers in the UK are demanding fresh food but also convenience; healthy and whole-foods but also fast food;

supporting local food economies and yet demanding produce from global economies. In seeking to improve the sustainability of food products it is critical to understand these ambiguities, as well recognising that even where a consumer expresses an active interest in food production issues, this will not necessarily impact on their food purchasing behaviour, if issues of price, convenience etc. are not also satisfied.

1.2 Information, knowledge and uncertainty

In travelling from 'farm to fork' food is affected by many different places, people and social institutions. Food choice is both very personal, but also very public. It also brings together the local and the global, as individual purchasing decisions are related to an increasingly international food supply system. "Hence, our dietary intake and health are affected by practices far away from our direct experience, and, in reverse, our food choices have effects that reach far beyond our own domestic worlds" (Cook *et al.* 1998: 163). Total transparency, it is suggested, is not necessarily the main goal for most people; rather consumers need institutions they can trust to supply the food that they want, often crossing what Cook *et al.* describe as 'thresholds' of trust. This may be through utilising local supply networks, such as a box scheme, wherein personal knowledge of the managers/producers gives consumers confidence in the produce they are buying, or more often through building up trust in particular retailers, or brands. Cook *et al.* (1998: 165) conclude that "a structural ambivalence can be identified" amongst consumers, whereby on the one hand they want to know something about the origin of the food they eat, and on the other they want to retain a degree of autonomy from public demands in their purchasing decisions, "to act without the burdens of responsibility" and to do what they want.

General public *awareness* about FSCs has been raised as a result of the media coverage of such issues as BSE, Foot and Mouth and GM foods, but this awareness is suggested as being very different to genuine knowledge and *understanding* about broader sustainability issues within the FSC (Enteleca 2001; IGD 2002d). IGD research suggests that consumers have a lower understanding than perhaps they think, with only 11% of respondents saying that they actively seek information about food production issues (investigators); 38% having little or no interest in finding out what happens to their food before they eat it, tending to stick to what they know (abdicators); and 51% are intent on improving their knowledge about FSC issues, although they have not yet got around to doing anything about it (spectators). In general, women show more interest in FSC issues than men, with IGD research showing that 15% of investigators were women compared to 7% of men, and 31% of the abdicators were women compared to 44% of men. In addition, people in AB socio-economic groups showed greater interest than those in the DE groups, with 16% of AB respondents being investigators compared to 8% of DE, and 31% of AB respondents being abdicators, compared to 46% of those from the DE groups. Anna Dawson, Programme Manager of the IGD's Consumer Unit, is quoted as saying "that whilst consumers think their understanding of food production has improved, their understanding is often still relatively low with many consumers holding inaccurate and often unnecessarily negative beliefs. Given their relative lack of active interest in improving knowledge, the challenge for industry, if they want to address these misconceptions, is in providing information in a format that grabs consumers' attention, which is relevant to them and which helps them make decisions about issues important to them" (IGD 2002c: 2).

Research carried out by the FSA shows that consumer concerns about food and its safety are often the result of news media coverage, rather than first-hand experience, even though consumers often treat this information with caution, recognising that the media has its own agenda. In addition, the government is often seen as an important source of information, although many consumers are sceptical of its competence in this context due to its past record in handling food scares: likewise inconsistencies amongst the scientific community have increased the levels of uncertainty amongst consumers. FSA research strongly indicates that consumers want to be happy they have impartial information on food safety issues, even to the extent that "people said they preferred the offer of honest uncertainty, even if it meant allowing small risk". However, in reality the FSA concluded that "any risk would make it difficult for them [consumers] to make a decision, and that what they really wanted was definitive advice from an authoritative source" (FSA 2002a: 8). The FSA also note a certain irony in that "the big retailers and established brands are widely trusted, yet people feel that many of their anxieties are a consequence of the industrialisation of farming and the commercialisation of food distribution" (FSA 2000: 9). FSA research has found that responses to food scares vary amongst consumers, with some people being unconcerned or fatalistic, whereas others, most particularly women, seek to find out about the issues and alter their eating behaviour accordingly. Consumers are often more imaginative about their concerns than they are about possible solutions, although it is clear that labelling needs to provide more meaningful information to consumers to help overcome their feeling of uncertainty.

Over the past decade or so, growing consumer concerns about a range of disparate issues within the FSC has meant that increasingly decisions are being made on an ethical basis. These ethical values are related to social, health, animal welfare and environmental issues, leading to a rapid growth in the fair trade and organic market since 1997. In terms of ethical purchasing, there is a plethora of schemes for consumers to choose from; however, the benefits of these are often poorly communicated to consumers, so that they are unable to make informed purchasing decisions according to their budget and/or conscience. There are also no independent standards for fairly traded foods that do not have the Fairtrade Mark, for example, meaning that consumers must rely on the integrity of these suppliers, rather than an independent third party body. Similarly, although organic foods must all be labelled by a certification body, different standards exist between the bodies concerned. Overall, labelling that communicates the underlying messages of ethical products is poorly developed, which hinders potential market growth (Mintel 2001a).

FSA research suggests that 75% of consumers are fairly or very concerned about food safety issues within the FSC, with organic food being considered an important option by some, although others feel that it is overpriced and offers no real advantage over non-organic products (FSA 2001; 2002a). To most consumers the term ‘organic’ is equated with an absence of chemicals etc., rather than its wider philosophies on crop husbandry and soil management etc.. Consumers also seem to be largely unaware that a high percentage of the organic food sold in the UK is imported, which is perhaps surprising in that many consumers are clearly unhappy about the importation of food that could be grown within the UK. As mentioned above, the principal barrier to eating more organic food is its premium price, and although some consumers are prepared (and/or able) to pay this premium, many more find the prices prohibitive, and some express concerns that they are simply being ripped-off by the supermarkets when they buy organic food. Mintel (2001c) found that more people in 2001, compared to 1999, perceived no difference in taste between organic and conventional food, and fewer believed organic products to be safer, better for you, or worth paying more for over the same period. Mintel (2001c) suggests that this indicates consumers are no longer seeing organic foods as a panacea to their food concerns, as they increasingly scrutinise the benefits offered. This is perhaps partly due to press coverage nurturing doubt about organic produce in consumers’ minds, but also indicative of the importance of communicating the wider benefits of organic food to consumers in order to engender positive attitudes, which in turn leads to its continued market growth.

The crucial message from the research above seems to be that consumers need better information at the point of sale in the form of clear labelling, and there has certainly been a proliferation of food logos. However, most shoppers do not recognise them, and although consumers are often familiar with terms such as organic they can seldom identify the associated logos. Indeed, IGD research has found that 23% of consumers could not recognise any food logos, 9% recognised the Soil Association logo, and 35% the Little Red Tractor logo (IGD 2002g). This is corroborated by FSA research which suggests that whilst up to two-thirds of consumers regularly check food labelling, many find it difficult to understand them and 25% of consumers would like more information. There is also a tendency for consumers to focus simply on the best before/used by date, without making wider associations with food production systems (FSA 2001; 2003). Indeed, FSA research suggests that consumer knowledge about farming and farming practices is generally fragmentary and incomplete, more so amongst urban than rural consumers. The FSA suggest that this is not necessarily because the consumers concerned do not care about the countryside, simply that they fail to make the relevant connections between their food purchases and the wider environmental and social impacts of their decisions (FSA 2002a; 2002b). In carrying out research for the Countryside Agency's *Eat the View* programme, the IGD then question whether it is better to enable producers to respond to current market trends, or to expect consumers to substantially change the type of produce they demand (IGD 2002b).

1.3 Availability of products and behavioural control

The organic food market has grown dramatically over the past five years or so, fuelled by consumer concerns over food safety, animal welfare and the environment, but also by greater consumer accessibility to organic foods. The latter is the result of mainstream manufacturers and the principal multiples extending their range of organic foods, whereby it is no longer simply a niche sector. Mintel (2001c) highlights two key factors that have helped supermarkets to increase their share of organic sales. Firstly, a general move towards one-stop shopping and secondly, a growth in the production of organic convenience foods, both of which are perceived to be welcomed by those consumers leading busy lifestyles. Although greater availability has led to falling price premiums, price is still a major factor in determining the growth of the organic food sector, with 40% of consumers expressing a willingness to buy more organic produce if the price was lower, with the most positive attitudes towards organic foods still being strongest amongst more affluent consumers (Mintel 2001c).

Similarly, the growth in demand for vegetarian produce is due to increasing numbers of vegetarians and meat-reducers, although the increasing range of convenience vegetarian lines and their availability in multiple retailers are also significant factors. Mainstream food producers are now major players in the manufacture and supply of vegetarian foods, and the multiple retailers are now responsible for a large and growing share of the produce sold (Mintel 2000b). Convenience, along with price, are critical factors in determining outlet choice (FSA 2002b).

In terms of UK produce, 50% of consumers claim they try to buy UK meat, 44% UK fresh fruit and vegetables, and 31% UK fresh fish, with 30% of consumers in this Mintel survey saying they would buy more UK produce if it was more widely available, and there was evidence of consumer frustration that more local produce is not available within supermarkets. Mintel (2003) identify that all the major supermarkets claim to be responding to increased consumer interest in local/regional produce, but as yet there is little evidence of this actually happening. In their research on consumer attitudes to 'local food', Weatherell *et al.* (2003) asked their respondents how likely they were to buy locally produced food were it available at the right price and in the right place. 74% of urban and 82% of rural respondents said they were strongly or extremely likely to do so, with only 5% reporting that they were not at all likely to choose locally produced food. Next, respondents were asked from a list of seven outlets from which they would prefer to buy their local produce. Mainstream supermarkets were by far the most popular choice, followed by FMs and local specialist shops, with a greater proportion of rural respondents choosing the latter. Respondents were also asked if they would be willing to pay more for locally produced food, with only a few saying they would pay over 10% more, and almost 25% saying that they would not be willing to pay any premium for local foods. This point is reinforced by consumers' continual insistence that practical factors such as taste, freshness, appearance and availability, almost invariably take precedence over civic factors (such as supporting the local economy). Clearly this presents a conundrum for increasing the sustainability of food products, a point which is well argued in the following quote from Weatherell *et al.* (2003: 241-242):

> "This suggests that for many people, buying local does not equate with engaging in a wholly different exchange relationship with producers, rather, local foods are expected to accord with normal shopping habits, retail outlets and end-product formats, at least if they are to play a regular part in the food choice repertoire… Thus, although fair levels of awareness and concern for wider food-related issues may exist within the population, which would 'push' consumers towards local foods, in practice many will only act upon these concerns if the offerings meet their normal, food-intrinsic and practical needs, thus pulling them away. In terms of the policy

> implications of these results, it may be argued that if policy-makers aim to bring local foods to a wider market beyond a small committed base, then developing local products through mainstream channels, using branding techniques to differentiate them effectively, must be considered a serious option alongside support for the proliferation of many small-scale, quasi-self-sustaining, localised food systems"…Should this happen, policymakers will need to "address the potential loss of social and environmental benefits…That is, more explicit and independent mechanisms would be needed to monitor and certify production and distribution practices for local foods sold through supermarkets".

Local food is often associated with ecology, animal welfare and rural communities, but this study suggests that "the products of localised food systems are still *food* products, which means that practical, nutritional and socio-cultural dimensions are critical to understanding them as items for exchange, usage and consumption" (Weatherell *et al.* 2003: 242).

In her assessment of the future direction of local food, La Trobe (2002) draws a similar conclusion and suggests that changing consumer shopping habits is a major issue. It may be possible to supply more local or sustainable produce, but how to get people to buy it. Local food needs to expand from the niche and into the mainstream. Consumers are often keen to support local food but this is often not reflected in their shopping habits. Most people shop at supermarkets, and therefore logically local food should be sold within this context, but then there are the problems associated with food miles, money lost from the local economy, poor returns to farmers etc. The alternative is to get consumers to buy through local food outlets, which are more time-consuming, have a smaller capacity, and are less convenient (La Trobe 2002).

IGD (2002f) research shows that 56% of consumers are interested in purchasing local foods, but that they are unlikely to compromise on quality, appearance, cost or product availability. Consumer interest in local produce tends to be higher than purchasing reality and, as such, the latter needs to be made as widely available as other produce and to offer the same general product qualities that consumers are used to. Anna Dawson, Programme Manager of the IGD's Consumer Unit, suggests that "successful local products will be those that meet consumer needs and compete well within the marketplace, rather than relying on consumer desire to buy local" (IGD 2002f: 1). In addition to improving the accessibility of local/ethical/sustainable food products, it is also important to communicate to consumers why they are different, and what their purchasing decision might represent in terms of the countryside, animal welfare etc. (ERM 1998).

To some extent it seems that the place of purchase has a relevance for food consumers. FSA (2002b) research, for example, has found that some consumers, whilst recognising that supermarkets provide convenience, variety and competitive prices, feel that in the process they are sacrificing transparency, freshness and human interaction. In their research on consumers at farmers' markets, Holloway and Kneafsey suggest that consumers make assumptions about both the quality and freshness of the products they buy, based solely on the consumption context. In the process 'local' and 'quality' become conflated, whereby "the act of purchase is…layered with meanings concerning trust, quality and morality, tied-in to the notion of 'localness'". Consumers also clearly enjoy the atmosphere of FMs, the opportunity to support local producers and the ability to sample the food before purchasing it. However, a major stumbling block to their scaling-up potential is their lack of convenience and frequency (Archer *et al.* 2003). IGD (2002a) research would seem to indicate similar sentiments for food purchases in local shops, where the main drivers for buying produce are identified as: freshness, taste, supporting local/British, value for money, and customer service. In comparison, the barriers to buying produce in local shops include: appearance, location, opening hours, limited numbers, and hygiene. Most of the drivers, therefore, relate to the product itself, whereas the barriers relate to the perceived inconvenience of the outlets, rather than to the product itself.

As suggested above, increasing numbers of consumers are interested in ethical issues, but the critical question is the extent to which they will transfer this interest into actual purchasing decisions. Ethical issues, and the availability of ethical produce, is becoming more mainstream. However, will those consumers who have some interest in ethical issues, but not to the extent of hunting for special products in alternative outlets, be satisfied with this approach. Mintel identifies three main impediments to consumers 'putting their money where their mouth is' in terms of ethical products: value for money; the potential for confusion over logos and standards; and the extent to which consumers feel they can make a difference. Increasing competition within the ethical market should help to reduce prices, but it is essential that schemes and standards are sufficiently transparent to allow consumers to understand what they are buying into, if the market for ethical goods is to grow (Mintel 2001a).

1.4 The decision process: attitude and consumption behaviour

A literature review on existing consumer research suggests that although most consumers may be willing to pay more for sustainably produced products, only a minority are currently able or willing to pay a premium for these products. So although they may have a positive attitude, they are largely passive when it comes to supporting environmental or animal welfare improvements, and there is “an unresolved conflict between these positive attitudes towards sustainability and the desire for year round access to all foods” (Enteleca 2001: 1). Consumers are principally concerned with personal issues when it comes to food choice, and are generally vague about the global issues involved, or how their purchasing choices may affect the British countryside.

Consumer purchasing decisions are most likely to change if they believe there is ‘something in it for them’. Animal welfare concerns and support for British farmers are often discussed by consumers, but this interest does not necessarily affect purchasing decisions (IGD 2002a). Self-interest, rather than altruistic motivations, largely drives consumer interest in production issues. IGD research suggests that “whilst many of the respondents were quite animated in their discussions about food production, many quite openly admitted that within a day-to-day situation, food production issues were unlikely to impact their food purchase decisions” (IGD 2002a: 51), unless for risk avoidance or a perceived personal benefit.

Consumer purchasing decisions often incorporate a complex amalgam of motivations, that complicates an understanding of particular instances. This complexity is encapsulated within the following quote from the IGD (2002b: 107-108):

> “Specific attitudes may suggest a specific behaviour when taken in isolation, but this may not be the case when considering the broader purchase decision, additional attitudes come into play, moderating behaviour, diluting the impact of other attitudes and resulting in an alternative outcome. For example, an individual may be interested in food production because of the impact it has on the appearance of the countryside and may want to buy local foods as a consequence, but when it comes to making an actual purchase consideration for the family’s likes and dislikes, budget, and availability and quality of the products may mean a sustainable purchase is not actually made…The purchase of sustainable foods, especially local foods, appears not to follow a straightforward model, and potentially is more complex than purchase decisions in a supermarket. Purchase decisions for these products often need to encompass a great range of decisions surrounding outlet as well as product. Any future strategies aiming to promote local food and build awareness of the link with the countryside should take account of this complex decision process”.

Most consumers express a tacit support for buying British produce, although in reality most do not actively seek it out, and many do not consider the country of origin when buying their food. Where consumers do buy British produce, it is only where it is of comparable quality and price to imported products. The inference drawn from this IGD report was that stronger associations need to be made in the minds of consumers between British food, and the particular quality and value attributes that may be associated with it (IGD 1998). Similarly, recent studies identify considerable consumer interest in buying local produce, although a much smaller percentage actually buy them. Consumers are often interested in buying local produce because it is perceived to benefit the local area, and yet cheaper prices, convenience and accessibility are likely to be the major factors encouraging more consumers to buy more local produce (Purslow 2000). Weatherell *et al.* (2003) came to a similar conclusion in their research, although they pointed out that certain consumers of local foods might in fact be concerned to cultivate a different relationship with their food and its producers, which may incorporate such elements as shared values, reciprocity and trust.

Certainly, Mintel research suggests that 50% of consumers are interested in ethical issues (which may well include 'local food' for some consumers), particularly in relation to food. However, that this interest will not necessarily motivate them to alter their purchasing habits and to 'put their money where their mouth is'. Higher prices inhibit the growth of the market, as well as insufficient knowledge about what is distinctive about these products. It becomes critical, therefore, to communicate what is different about these ethical products, so that the consumer can make a more informed choice (Mintel 2001a; 2003). Nevertheless, it is ironic that higher animal welfare standards within UK food production (such as the January 1999 ban on the use of tethers and stalls for pregnant sows), brought in partly as a response to consumer demands, are causing the British pig industry to be uncompetitive in relation to cheaper imported products, in that as yet many consumers are not prepared to pay for the higher standards that, arguably, they have demanded (Mintel 2001a).

1.5 Socio-demographic profile

Research carried out by Mintel (2000a) split consumers into the following categories: good food lovers who enjoy their food and do not eat simply to fill themselves up (37%); traditionalists, who enjoy their food, but it must be traditional (22%); foodies, who enjoy different food types, and admit to often eating too much (21%); pickers, who only eat when they are hungry, with many admitting that they are fussy eaters (10%); and quantity not quality eaters, who eat simply to fill themselves up, with most preferring traditional meals (10%). Good food lovers tend to be affluent, with 47% being ABs and 30% C2DEs. Traditionalists are most common among those over 55, and especially over 65. Pickers are most likely to be aged 15-19 and are intent on enjoying themselves with friends rather than sitting down to a meal, whilst for good food lovers and foodies the variety of dishes is particularly important.

Concern about food safety is widespread amongst consumers, with a clear skew towards women aged between 45-54 and ABs. This, it is suggested, is due to women's traditional role in determining what actually goes into the shopping basket, and their generally higher interest in diet and health-related issues. Socio-economic groups AB are more likely to have food safety concerns than DEs, partly through being better educated and accessing more in-depth information through reading the 'quality' press. It is also the case that these issues are often fairly complex, leading many less well-educated groups to simply ignore them. The latter also tend to have less financial flexibility in their food choices than those with more disposable income (Mintel 2000a). These findings are broadly corroborated by the FSA, who again identify that women and ABs tend to be more aware of food issues and are most concerned about food safety. They also identified a gradient of awareness/concern across the social grades, with ABs most involved and DEs least so. In terms of age, the extremes (16-25 and 66+) tended to have fewer concerns and to be less aware/informed about food related issues than other age groups. It would also appear that urban consumers are more concerned about food safety issues than their rural counterparts.

However, research conducted by Weatherell *et al.* (2003) indicates that rural consumers were more inclined to buy directly from farms, and to be more aware of, and knowledgeable about, FMD and other food supply chain issues. An IGD study (IGD 2002a) also found that consumers living in those areas surrounded by the countryside, and where the local economy is reliant on agriculture, are more likely to care about the impact their food purchases have on the countryside and environment, than those who are detached from the countryside and live in urban areas.

Buyers of British and local produce tend to be over 35 years old and are particularly concentrated amongst those aged 55 plus. ABs and Es are strongly represented, along with family groupings. Older consumers grew up mainly with British produce and may not see the point of importing produce from abroad. Women show a greater preference for British sourced produce than men, undoubtedly reflecting their role in shopping for food in most households. Those who simply buy what is available in the supermarket, irrespective of its origins, are more likely to be younger consumers under 44, and especially those between 25-34 (Mintel 2003).

Consumers aged 35 and over, and especially those with a family and aged between 35-44, are the most likely purchasers of organic food. In terms of socio-economic groupings, those within ABC1 predominate, with the relatively cash poor DE groups being more concerned with price/cost issues (Mintel 2000b; 2001a; 2001c). Likewise, ABC1s are more likely to buy ethical foods than DEs, and although vegetarians are of all ages, there is a distinct bias towards women under the age of 35.

Food choice and availability are recognised by consumers as being greater than ever before, although this choice is sometimes seen as a bewildering, especially amongst C2s and DEs (FSA 2002a). Lower income consumers also tend to have the least awareness of food quality assurance schemes and are often cynical about the trustworthiness of food labels (NCC 2003).

1.6 Social embeddedness

Lacy (2000: 19) argues that:

> "Food and our food system, characterised by intense commodification and by an accelerating distancing of producer and consumer from each other and from the earth, represent the general failure of late capitalism and postmodernism. Our food comes increasingly from all points on the globe…[and] as a consequence, people are separated not only from their food, but also from knowledge about how and by whom their food is produced, processed, and transported".

The report of the UK Policy Commission on the Future of Farming and Food (DEFRA 2002) had as its central theme the reconnection of the consumer with what they eat and how it is produced, with the specific intention of improving the sustainability of farming and food. Part of this process has been an increasing recognition of the significance of social relations within the FSC, as a means of generating trust and increasing transparency in the provision of food. Within the academic literature this is known as social embeddedness, a concept which has been extended to include the relevance of the location of food production, or its 'local embeddedness': something that was also recognised as a significant opportunity within the Policy Commission's report.

This is not to suggest that social embeddedness overrides economic issues, simply that the social ramifications of the exchange process are given more recognition. This tendency is particularly noted in direct marketing outlets such as farmers' markets, and indeed has been identified as the principal comparative advantage of such retail outlets (Hinrichs 2000). The opportunity for consumers to interact directly with the producers of the produce they are buying is seen by consumers as an opportunity to build up trust in the vendor concerned, and subsequently their produce, as the following quotes demonstrate (Kirwan 2003):

> "I think in terms of the repeat business, it is based on trust. At the end of the day I can walk into a supermarket, it's there on the shelf, it's packaged, with a British farm assurance standard on it perhaps. However that is not necessarily a guarantee, whereas if you have actually got somebody to talk to; in your own mind you can assess the quality for yourself" (FM consumer).
>
> "I feel it is important to a lot of people to have a connection with where their food comes from. And I suppose the evidence is that people are keen to talk about the chickens and how many eggs do they lay a day or a week…And so being able to talk knowledgeably about that gives them confidence as to what you're doing, and I think that breeds confidence for them in the food they are eating" (FM producer).

This increased consumer interest in having closer social/ local connections with their produce has been recognised by the large supermarkets, who have variously sought to mimic what outlets such as FMs can offer consumers. Most recently, Sainsbury's has opened a range of stores called Sainsbury's Markets, which are intent on cashing in on the popularity of FMs, although inevitably they do not have the same level of connection that is present in the original concept (Poulter 2003). As with organic food, for example, the main question is again to what extent will consumers be satisfied with these imitations.

Barriers for consumption of sustainable food products

On the basis of the above review of consumers' decision-making processes in relation to sustainable food products, it is possible to identify the following barriers. The remainder of this section then provides some illustrations of these barriers from extant research.

Consumer purchasing decisions about food are essentially selfish, rather than being driven by altruistic motivations.

It is not possible to rely on consumers' goodwill to increase the consumption of sustainable food products, it is necessary to respond to their needs/demands.

Despite the growing awareness of the FSC amongst consumers, there is generally a low-level of understanding about the wider implications and issues inherent within their food purchasing decisions.

Most consumers buy most of their food provisions from supermarkets, and yet, particularly with local food, there is often a lack of this type of produce available. Correspondingly, local food outlets such as farmers' markets often lack the regularity and convenience demanded by consumers.

Logos and labelling are often confusing and inadequate for consumers, leading many of them to lose interest in the underlying messages.

It seems likely that there is an ambivalence amongst consumers concerning the source of their food. To some extent they are interested in learning more about the impact of their purchasing decisions, and yet at the same time they just want to buy their provisions without feeling a sense of moral obligation to buy something in particular.

The often higher prices charged for 'sustainable' food products is a disincentive for all consumers, although particularly so for the lower socio-economic groups. Even where a consumer may be able to afford sustainable food products, there is frequently insufficient information to encourage them that the extra expense is worth it.

IGD research for the Countryside Agency showed that few respondents consciously make connection between the food they eat and the wider countryside and FSC. Some simply do not care, but many would if they had more knowledge and understanding of the issues involved. This could be helped by directly promoting the value of the countryside through such initiatives as demonstration farms, or indirectly by promoting the benefits of local and regional/British food in ways that match their demands for taste, customer service, food quality, availability, accessibility and affordability. The report concludes that “in reality consumers appear to be most likely to change their purchase behaviour of food if they believe there is ‘something in it for them’” (IGD 2002a: 111).

The reality of getting consumers to make connections is recognised as being very difficult. Consumers tend to think about issues of brand, value and packaging, rather than making more abstract connections to wider FSCs. Where consumers do connect with these abstract issues, it tends to be through notions of ‘local’ or ‘environmentally friendly’ produce. Yet, ‘local’ produce may involve many unsustainable components, likewise ‘environmentally friendly’ produce may involve organic produce from the other side of the world. Indeed, as mentioned above, one of the key drivers for the growth of the organic market is its greater availability within mainstream retailers (76% of retail value), and significantly around 75% of the organic products sold in the UK are imported (Enteleca 2001; Mintel 2001c). Taken with the widespread ignorance about the origins of the food they eat (for example in a recent NFU survey less than 10% of the respondents knew that British farmers grow most of the food eaten in Britain (whereas in fact it is 64%) (C/oBF 2003)), this provides “an argument for distinguishing sustainable as distinct from other associated labels such as organic, local and speciality [in order] to focus on the characteristics of the product that make them sustainable” (Enteleca 2001: 3).

Food, and in particular local and regional food, has become increasingly fashionable in recent years to the extent that its fashionability may attract some new customers to local food and local food retailers, rather than any particular interest or concern about production methods. However, the IGD (2002b) are insistent that a change to more sustainable consumption cannot rely on consumers’ goodwill, it must also respond to their needs. If consumers are to be persuaded to buy more ‘sustainable’ food, then it must meet their normal purchasing demands in terms of quality, taste, convenience etc.

The following quotation from an FSA report on the future of food and farming in the UK, provides a useful summary of the barriers faced when trying to increase the consumption of sustainable food products (FSA 2002b: 3):

> “In choosing food most people do not have in mind the impact of food production on the environment, countryside and rural economy – partly because these issues are typically neither clear nor salient in their minds, but also because they already have enough to think about. Even if they were disposed to take these factors into account

> there is again nothing at the point of purchase to enable them to discriminate between more and less environment-friendly products".

The report goes on to stress that there is a need for better labelling schemes to facilitate consumer choice at the point of purchase. It points out that often consumers are prepared to pay a slight premium for produce that is more sustainable in environmental, or animal welfare terms, "providing they [are] convinced about the genuineness of these improvements and [can] identify them at the point of purchase" (FSA 2002b: 4). Nevertheless, the report also recognises that people on low incomes find it difficult to pay these premiums, and that the public's understanding of what happens within the FSC is generally poor. The corollary of this situation is suggested as being "that consumers who would prefer not to buy products which involve (for example) cruelty to animals are left with the choice either of just reducing their meat consumption altogether, or simply shutting their eyes to what might (or might not) have happened to the livestock" (FSA 2002b: 5). More transparent and explicit labelling is critical, so that people know exactly what they may be paying a price premium for. Indeed, these findings are nothing new, in that Hodgson and Bruhn (1993) in their study of consumer attitudes to product descriptors came to a similar conclusion, even to the extent that a misrepresentation of the origin of production was perceived by customers as deception.

The National Consumer Council (NCC) argue that it is critical that voluntary food labels communicate clear and honest messages to consumers, thereby allowing them to make informed choices about the food they are buying. The proliferation of logos, brought about by food businesses seeking to add value and differentiate their products, is confusing consumers and leading to information overload. Many consumers clearly do not understand what the logos mean. There needs to be better coordination, consistency and communication between different labelling schemes. Research carried out by the NCC on consumer perceptions of labelling found that they often feel 'bamboozled, bombarded, confused and worried' by them. "As a consequence, they tended to see only what was personally relevant, meaningful and valued by themselves as individual consumers, resulting in the erection of filters to block out most of the information that was not specifically relevant to them or their family" (NCC 2003: 8).

Possibilities to remove the above-mentioned barriers

In response to section 2 above, the following possibilities to remove or ameliorate the barriers to the consumption of sustainable food products are given below, followed by some illustrations from extent research.

- Whilst some consumers are not interested in the origins of the food they buy, many more might be if they had greater access to suitable information.
- Consumers are not homogenous, and there is the opportunity to target specific groups with particular messages about the sustainability of the food they purchase.
- Although improving consumer understandings about the origins of their food purchases is problematic (and may not lead to changes in their purchasing patterns), generating consumer interest is a constructive first step towards changing their attitude and subsequently their behaviour.
- Highlighting/promoting the wider benefits of purchasing sustainable food products, such as organic, is critical to improving consumer understanding about the impact of their purchases and helping to ensure that their interest is converted into action.
- Improving the visibility, consistency, credibility and simplicity of food labelling schemes is critical to increasing consumer connections with, and understanding of, the produce they are buying. Currently, a lack of suitable labelling is hindering the market growth of sustainable food products.
- It is necessary to provide sustainable food products in such a way as to satisfy normal consumer demands in terms of availability, price, convenience, etc., rather than attempting to persuade consumers to fundamentally change their shopping patterns.
- It is important to increase the levels of sustainable food produce available in supermarkets, in that this is where the majority of consumer food purchases are. However, care is needed to ensure that the wider sustainability credentials of the produce concerned are maintained.
- Increasing the level of sales through supermarkets should also help to reduce the price premiums charged for sustainable produce, although care will again be needed to avoid adversely impacting on suppliers' margins (thereby potentially reducing their sustainability).

The apparently growing scepticism about the benefits of organic food might perhaps be assuaged by promoting its traceability and potential to support the local rural economy, where this is demonstrably the case. This will then further differentiate organic food as produce that contributes to the overall sustainability of the FSC, over and above its perceived health benefits.

Within this context, it is also apparent that an over abundance of certification standards is leading to consumer confusion, suggesting the benefit of having a single standard (Mintel 2001c).

In order to encourage consumers to buy local food, the produce must be of a high quality in terms of freshness and price. As suggested above, consumers are clearly not a homogenous group, and raising their awareness of the issues involved within food production needs to be targeted accordingly. This may be in terms of matching the messages about sustainable food production to the recipient group; or in ensuring that the produce is available in supermarkets, in that the majority of consumers use them at least once a week (73%); or through improving the promotion and frequency of FMs, whereby they provide consumers with a higher level of service and regularity (IGD 2002b). As highlighted by the IGD (2002b: 103), "although interest alone will not change behaviour, generating consumers' interest is an important first step in beginning to change attitudes and behaviour…Attitudinal change may occur through an individual's own experiences but also the information they are exposed to".

As such, the NCC are pressing hard for food labels to be made more visible (large enough print and not subsumed within the brand name etc.), to be more easily understood by the consumer (preferably without reading too much), and to be credible. The NCC argue that (NCC 2003: 17-19):

> "Consumers are confused and lack trust in food labelling. Consumers who strive to find credible, honest, assured food labelling are being severely disadvantaged by the current 'free for all' labelling schemes and logo proliferation. However, if used properly, credible labelling schemes offer great potential to inform, differentiate products and offer real choices to consumers"…A more harmonised and focused approach that reduces the number of schemes in operation would bring the obvious benefits of better consumer understanding, recognition and improved trust...This should not reduce the competitive advantage but ensure a baseline for consistent, clear, understandable messages that consumers want and are able to trust when making food purchasing choices".

Existing labelling schemes often lack transparency and many food label definitions are inconsistent, poorly defined and open to interpretation (e.g. 'vegetarian', 'healthy', 'sustainable' etc.). Similarly with endorsements, such as those by the British Heart Foundation, in that it is often not clear on what basis these endorsements have been made. The FSA, through its Food Labelling Action Plan, is aiming to improve the use of voluntary labelling and to ensure that food labelling is accurate, straightforward, clear, prominent, and communicates the principles and rationale behind each scheme, as well as being well-publicised, recognised, and governed by an independent authority that carries out regular and rigorous inspections (NCC 2003).

Part IV: Strategies to stimulate sustainable consumption

Following the lead of the Belgian report (as work-package coordinators), this section now considers the four principal elements of the marketing mix – product, price, promotion and place (the four Ps) – in terms of stimulating sustainable consumption, together with the 5th P, namely people. Each of these is now briefly described in turn. Firstly, the *product* should be intrinsically sustainable. This in itself can be problematic in that elements of sustainability can on occasions be contradictory, such as organic food products from New Zealand, for example. Critically, the sustainability attributes of the product need to be consistently applied, and apparent throughout the FSC. For example, where the product aims to contribute to the sustainability of a rural area, it may be facilitated by the use of an AOC/PGI/PDO label, but it is important to ensure that the value-added potential of this designation (and hence sustainability attribute) accrues to the rural area(s) concerned. The packaging and image of the product should also be consistent with its underlying sustainability, which in turn links-in to its promotion.

Secondly, the *price* premium charged for sustainable food products is frequently highlighted as a barrier to increasing their consumption. It has been identified that one method of overcoming this problem is to ensure that more sustainable food products are sold in the supermarkets, so that the quantity sold increases and the unit price comes down as a result. In terms of local food products, the Report of the Policy Commission on the Future of Farming and Food (DEFRA 2002: 119) recommended that "retailers who give over a portion of their store as an outlet for local producers to sell direct to the public should receive business rate relief on that part of their premises". It is also apparent that lower socio-economic groupings (DEs) are relatively disadvantaged in terms of access to sustainable food products, due to the relatively higher prices involved. One possible solution is to provide food vouchers, such as those within the Farmers' Market Nutrition Programme in the USA, although as yet this has not really happened in the UK.

Thirdly, as indicated throughout this report, it is of fundamental importance to improve the *promotion* of sustainable food products. This will then allow more consumers to consider whether they wish to pay for the 'sustainability' attributes of the produce they are buying. One particular strategy that has sought to promote the connections between the food consumers eat and the wider sustainability of the countryside is the Countryside Agency's *Eat the View* programme. This programme suggests that:

> "Some products, because of the way they are produced, their area of origin, or other qualities, can help maintain the environmental quality and diversity of the countryside. (CA 2002: 10). "Consumer support for England's farmers and land managers is important to the future of our countryside. It is crucial that people make the link between the goods they buy and the countryside they cherish and that they understand that through their purchases they can exert a positive effect on the way the countryside is managed. The Eat the View initiative is working to make these links and to help develop the market for products which support a more sustainable approach to farming and land management" (CA 2002: 6).

The multiple retailers also potentially have a crucial role in the promotion of sustainable food products, and some of them are now starting to do this. For example, Waitrose has developed its *Locally Produced* scheme (Waitrose 2003), which clearly indicates to the consumer what they are buying into, at the point of purchase.

Fourthly, it is apparent that the *place* of purchase is significant to certain consumers, to some extent being indicative of the 'sustainability' of the produce purchased (such as farmers' markets). Nevertheless, supermarkets are where the majority of people buy the majority of their food produce, and it is apparent that in terms of quantity this is where marketing incentives to increase the consumption of sustainable food products should be aimed. However, this emphasis should not preclude improving consumer access to sustainable products through more localised outlets, such as local food shops and farmers' markets, where improving their convenience and logistical efficiency should be considered. It is also clear that the fifth P, *people*, is particularly relevant within the context of more localised outlets, as consumers are able to attain higher levels of personal and human-level assurance and interaction than is normally available in supermarkets.

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A brief reflexive review

Rather than alter the contents of this report, which fairly represent the literature on the demand for sustainable food in the UK, this section focuses on a number of themes which became apparent on reflexively reviewing the report, and which are considered relevant to the overall aims of SUSCHAIN.

Sustainability

Despite its extraordinarily wide usage, few terms are as elusive as sustainability. This arises in part because the concept straddles the positivistic-reflexive divide, in that sustainability ideas inform the actions of scientists from both sides of the fence. At the core of the problem is the recognition that notions of sustainability are socially constructed, contested and mutable, rather than objectively measurable and verifiable facts. Further, since almost all conceptualisations of sustainability embrace social, economic and environmental variables, the measurement of sustainability and, more importantly, the measurement of gains or losses in sustainability, are impossible to assess without common denominators or trade-off 'rules', which even working with Brundtland conceptualisations, we do not have. Whilst some might want to deal in units of support energy used, others may try to estimate the full array of non-market costs and benefits in different FSCs.

The holistic definition of sustainable agriculture offered by the SDC can be modestly and unproblematically extended to include FSCs. However, such an extension merely compounds the challenge of measurement and the scope for controversy in choosing the variables to measure sustainability change and then being able to measure the change in those variables.

One of the tasks given to us is to explore the strategies to stimulate sustainable consumption, but no one can agree on what variables we are to measure to know what sustainable consumption is. We are thus shooting in the dark at an invisible and unknown target so we cannot know whether or not any gains have taken place.

Ideology dressed as analysis

We might posit a position where it is impossible to be ideologically disconnected from the literature on food. Many of the studies that look at sustainability issues, are suffused with antagonism towards some elements of the globalised food industry. Distaste of what is being explored/exposed shines through much of the AFE literature. I have much sympathy with much of the standard critique; I use it myself; but equally I recognise that this is a position founded on values not facts.

The paradox (or perhaps schizophrenia) associated with consumer vs citizen values suffuses this debate. What we argue for and what we do may be compatible, but it probably is not. We appear to like the idea of local/organic/sustainable but it must also be cheap, readily available and have certain intrinsic qualities. The other qualities tend to over-ride the sustainability attributes somewhere between answering the question to the market researcher and making the decision to purchase.

Can we therefore conclude that sustainability as a product attribute, as well as being mutable and contested, is for many at least, a weak driver of food choice?

This weakness may be compounded by the heterogeneity of consumer conceptions of sustainability. Whilst some might be buying into local culture and landscape, others may be buying into health attributes and still others into ecology or fair trade.

For many engaged in critical analysis of FSCs, there is an explicit change agenda. Ideology and deeply held and often divergent value systems can drive ‘analysis’.

This is not intended as a critique of engaged advocacy; merely an attempt to point out its existence and relevance. The advocacy becomes inextricably intertwined with the whole process of demand shifts and changing consumer behaviour and rent seeking via policy change. The information base on which we draw is not based on objective external analysis but on engaged advocacy. Sometimes this engaged advocacy may be overt (especially with the anti-globalisation campaigners); at other times it may be more subtle (as with industry-funded research projects).

What the results from market research seem to tell us.

The over-riding conclusion that can be drawn from UK market research is that the sustainability attributes of food have become more important concerns and have often driven demand changes for products that are seen to have specific sustainability attributes. This case is most clearly made for organic food.

However the overall extent of demand change is not that large, in that overall consumption has gone up from a very low base and it is uncertain how much this is supply driven rather than demand driven. In other words, government-sponsored schemes have increased the supply of organic food, making it cheaper at the tills, because, in the wake of these policy-induced changes, continuity of supply exists and scale economies can be derived. So we do not know if we are dealing with demand shifts or supply-induced demand change.

However, most consumers' allegiance to sustainability is weak. Unavailability at the normal store of choice, price or quality variability can and do all deter demand and consumption.

There is a suggestion that there is a small core of *aficionados* or committed consumers and a much more numerous group of occasional users/dabblers with sustainable produce. Demand for much sustainable produce would appear to be volatile rather than stable, but with a tendency to be expanding rather than contracting.

Surveys also point to weak recognition of some of the most enduring sustainability label/logos. One study showed that less than 10% of the population recognised the Soil Association's logo, which is by far the most commonly used organic label in the UK.

A further factor is that consumers frequently seem unable to differentiate local and organic food. This further points to there being a bundle of factors loosely connected with sustainability that influence food choice, with consumers apparently indifferent between local-ness and organic status as a discriminating variable.

So there is an issue as to how consumers conflate bundles of attributes when making food choices.

Can we really expect 'them' (or us) to understand?

In this era of reflexive consumerism, do we really expect consumers to factor in risk and a whole bundle of other ideas, values and bits of knowledge and then make an informed choice? Of course, some may behave thus. But I would contend that certain factors such as the massive increase in value-added food, pre-prepared and processed food with many ingredients make it very difficult to come up with a sustainability promise that really means anything unless a raw material, single ingredient, single sourced commodity is being purchased. Given the increased prevalence of eating out, confidence in sustainability claims concerning raw materials may be even harder to corroborate.

We live in an age saturated by information, but compromised at every turn by our ignorance and incapacity to store/retrieve more than a fraction of the exponentially increasing amount of information around us. This applies pretty much in all walks of life, whether we are buying a digital camera, a meal or an ingredient to input into a home-prepared meal. All the attempts to differentiate products and present quality assurance are entirely legitimate attempt in a world of demassified products to hold our attention and to serve the interests of the provider, but the sheer number of schemes and products on offer means that, unable to accommodate the information, we retreat into habitualised behaviour or generalised feelings of trust (see below).

Is it really a demand problem?

We can look at demand changes from at least two angles. First, and what is explicit in much of the work, we can explore via consumer research how much consumers value sustainability. Second, we can attempt to factor in elements of unsustainability using non-market evaluation methods and we can tax pollution, unsustainability and road miles etc.. Rather than exhort consumers to boycott Kenyan French beans, which are air-freighted into the UK, we might only need to raise their price to account for the external damage to the environment. This should deter consumption. The general thrust of the data on food choice is that many consumers are price sensitive; even if they are not, we can use the tax for an environmentally compensating project; and the price difference between locally produced and low-cost third world labour produced product will then necessarily narrow.

The key to sustainability enhancement may thus be to work through regulated citizen values, manifested through policy adjustment in favour of sustainable produce, rather than try to hector consumers to select a more sustainable product from the shelf or wait for some consumer-driven model of markets to bear fruit.

The search for transparency

The search for transparency in FSCs may be a futile goal, given the multi-ingredient products that are now the normal food products purchased by so many.

The search for trust is a different matter. Of course consumers want to have a degree of trust in what they purchase, but that trust is built up by producer, retailer or experience, or any combination thereof, or by other intermediary bodies and institutions. There are many ways in which quality assurance is embodied in a product, from EFSIS controls, to firm-specific inspection procedures to labelling. I suspect that most food decisions are made on the back of limited knowledge, prior experience, recommendation or externalised trust (knowing that a particular firm has ethical standards/good environmental policy etc.).

It may be that many consumers simply trust the familiar. Consumers know a particular supermarket and its products and habitual behaviour may be quite hard to disrupt. If the sustainability features are new, it may be rather hard to persuade people to change their food choice when the attribute value is low and the price differential considerable.

So transparency might be an unattainable ideal, for which we need some kind of substitute, such as a general trust for a firm or producer's production system/product range.

Where is demand heading?

Demand for many products with sustainability attributes is almost certainly increasing, but the range of demands and their inherently contradictory nature is also strikingly evident- the best example is that of the insinuation that an organic product sent half way round the world is more sustainable than a non-organic product produced in the back-yard of one's home. One dimensional sustainability is rather hard to defend using a Brundtlandian definition of sustainability.

So yes, we can detect from a range of indicators an increase in demand for more sustainable foods. However, these demands may differ radically from one consumer to another, with one consumer demanding fair traded goods and another locally produced goods. Heterogeneity is omnipresent. Sustainability is simply one differentiating strategy amongst a myriad of others; and, as noted earlier, sustainability is a messy composite, a chaotic conception rather than a clearly definable product feature of attribute.

Conclusion

Market research can take us to models of consumer behaviour and to demand evidence for sustainability attributes of products, but there are many areas which are imperfectly understood or almost completely unknown.

Many mass surveys have been conducted, but beyond concluding that there is growing demand for sustainability attributes, but that these attributes are weakly developed for most but not all consumers, we know little, in spite of enormous expenditures.

We know that there are elements of volatility in markets, exacerbated by concerns and crises in conventional food supply chains and that this volatility can induce demand shifts, but we do not know and cannot easily foresee the demand dynamics in the future. In spite of tighter regulatory control in some facets of the production process, the overall sustainability attributes of food become obscured by the sheer variety and complexity of what we now eat.