

OMIARD project

Report on focus group - Italy

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1 Introduction

Six group sessions were conducted in the region of Apulia, and specifically in the province of Bari, since this region has been defined as a potential market for the development of the organic market.

The level of organic consumption in southern Italy is very different from that of northern Italy. In general, organic consumption in the south is not as large as in the north and in the centre of Italy, therefore the percentage of organic consumers in the south is lower than in the north of Italy. Moreover, the majority of people in the south either grow their own fresh fruit or vegetables, or have relatives with a small piece of land in the countryside, or else have a friendly relationship with someone who has cultivated land: for these reasons consumers in the south almost always have and use fresh fruit and vegetables and do not feel the need to change their diet or to start eating fresh products.

The main difficulty arising during the analysis of the focus groups, particularly for non-regular consumers, was making the distinction between statements concerning organic products and statements related to general consumption.

Between 8 and 10 participants were present in each group; criteria for recruiting and quota were as follows:

1. Aged 18 to 55 and plus (at least 25% of each 18-35, 36-54, 55+)
2. Male/female mix (25-40% male)
3. Participants with children (at least 25% have children younger than 14)
4. Mix of full time and part time employment (at least 25% are working full time)
5. Different levels of education (at least 50% not university educated)
6. Regular and occasional consumers (each group has to contain just one type of consumer)

More specifically, three groups were made up of consumers who regularly buy organic food, in other words, who make at least one organic purchase a week. The other three groups were made up of participants who either buy organic occasionally (occasionally means 2 purchases a month) or who never buy organic. In the analysis that follows, a distinction between regular organic food consumers and non-regular consumers has been made in order to distinguish the motivation of organic buyers from that of non-buyers.

The following tables (split between regular and non-regular organic consumers) show the participants for each focus group on the basis of the recruitment criteria (not all those recruited participated in the focus group, for this reason not all recruitment criteria have been observed):

REGULAR	1st group	2nd group	3rd group
No. of participants	7	7	8
Age: 18-35	14%	14,5%	25%
36-54	57%	71%	50%
55 +	29%	14,5%	25%
Gender: male	42%	42%	50%
People with children	28%	14%	38%
Work: full time	85%	71%	63%

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Education: non-university	43%	29%	50%
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NON-REGULAR	1st group	2nd group	3rd group
No. of participants	11	8	8
Age: 18-35	27%	38%	38%
36-54	55%	62%	37%
55 +	18%	0	25%
Gender: male	63%	62%	62%
People with children	27%	37%	25%
Work: full time	64%	75%	50%
Education: non-university	36%	25%	37%

To identify regular and occasional consumers, the interviewer asked the participants of the focus group how they identify organic products. 35% of regular consumers identify organic products by the name of the certification body, 26% by the organic food label, 26% of regular consumers buy organic products in an organic shop, 6,5% buy organic products at an organic farm and the last 6,5% identify organic products thanks to the organic section in the supermarkets.

Recruiting was made by Dr. Roberta Callieris and Dr. Annarita Antonelli of the International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM – IAMB) in Bari; group sessions were held in Valenzano (Bari) at the CIHEAM - IAMB on July 16, 17 and 18, 2002.

Group sessions lasted approximately two hours, each focus group session has been recorded in order to have a transcript of the discussion for analysis.

In return for their participation in these group sessions, participants received a bag with a selection of organic food or a purchase voucher worth €15,00 to spend in an organic food shop.

A discussion guide supplied by P9 (Hochschule fuer Angewandte Wissenschaften – Hamburg) was used by the moderators; all groups were moderated by Prof. Raffaele Zanolli and Dr. Daniela Vairo, University of Ancona, authors of the present report.

2 Influence and characteristics of organic food, food consumption and food purchase

2.1 Individual determinants

In what follows a distinction between cognitive level, affective level and behaviour has been made. It is important to stress the fact that it is very difficult to distinguish between affective and cognitive levels, since the affective level always has a cognitive counterpart.

2.1.1 Affective level

At the affective level, emotions, feelings, attitudes are listed without any explanation, as affective responses of consumers are not under discussion. Analysis of them is made when a consumer's

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affective reaction to the environment influences their cognition during decision making or when a consumer's cognitive interpretation of information in the environment triggers affective reactions. More specifically, what is classified as "affective" has been discussed and explained at the "cognitive" level.

- ◆ **Confusion:** regular and non-regular consumers think that people feel confused about organic products: they are not able to distinguish between organic products and "natural" products, they are not sure whether or not organic products are GMO free, ...
- ◆ **Satisfaction:** people who consume organic food do not feel satisfied by conventional products

"... conventional food is trash..."

On the other hand, occasional consumers are satisfied by the quality of conventional products

- ◆ **Worry:** organic consumers are afraid about illness, worried about the damage conventional food can cause and worried about their children's health

2.1.2 Cognitive level

- ◆ Regular consumers of organic products perceive that, in general, **knowledge** of organic production is low: people do not have a clear idea of what they are buying and where it comes from when they go shopping. The main reason for this lies in low knowledge of, and involvement with, food in general and in the perception that rules and standards governing organic farming are not consistent.

On the other hand, non-regular consumers have a clear idea about what organic production means, even if their knowledge is not as deep as they would like:

"... organic farming does not imply running a farm like they used to do in the past, it is not a bucolic idea, organic farming is an economic activity which applies different production techniques from conventional farming..."

- ◆ Regular consumers of organic products think that, in general, consumers are not **aware** of, and not interested in, ethical production standards or the respect of workers' rights and for these reasons most consumers buy products influenced by advertising.

Non-regular consumers think that in the southern Italy the consumption of organic products is a fashion,

"... it is a way to be different...";

in northern Italy consumers are more aware about their purchases, they pay more attention to food; farmers too are more aware of their production process.

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- ◆ For this reason, occasional consumers are perceived by regular consumers as people who think that **organic consumers are snobs**, just an elite who want to be different from conventional consumers.
- ◆ Some regular consumers are conditioned by **advertising** and think that the presence of a famous actor in an advertisement could push people to buy organic products: advertising influences the behaviour of consumers with an emotional message. Regular consumers, during shopping, remember products they have seen in advertising.
- ◆ However, advertising generally comes from big companies that have an economic interest in selling their products and do not have an interest in informing the community about the benefits of organic products in general; for this reason, consumers should have

“...the curiosity to change, to taste new products, the wish of challenging themselves...”.

- ◆ Since people who consume organic food do not feel satisfied with, or have trust in, conventional products, they think that conventional food is trash: these kind of people have an **ecological, ethical attitude** towards quality of life.
- ◆ People consume organic products because they are afraid about the damage conventional food could do to their health or because they are worried about their children's health: organic food is synonymous with healthy nutrition. Moreover, organic food is sometimes used by people with allergies. It is quite clear that regular organic consumers in general are **concerned about health**; for them eating organic products is a way of eating differently which implies a wholesome life.
- ◆ On the other hand, people who do not know the difference between organic and conventional products are perceived as being **not health-aware**: for them conventional products are the same quality as organic products.
- ◆ People who do not consume or consume organic products only occasionally are perceived to be **sceptical**: people who do not trust or do not have confidence in organic production do not want to spend more. Sceptical consumers think that

“...nobody is honest...”

- ◆ If there is no trust in organic production, non consumers are perceived to be people without a relationship with nature: they are not interested in natural production, in protecting the environment. Regular consumers believe in

“... seasonal products, in products cultivated without the use of greenhouses, in a production system which respects the natural rhythm ...”

- ◆ In general, to be regular consumers people need

“... to stop, to think, to understand, to make a choice, to pay attention to food...”.

Regular consumers want something different to eat, and they trust organic products

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“... to eat organic is a act of faith...”

Consuming organic food implies a lifestyle choice.

2.1.3 Consumer behaviour

- ◆ In general, organic food buyers consume less, they are more interested in the quality of food than in the quantity, they choose and combine food in a different way and for this reason they feel that they have a different nutritional education from the conventional consumer. They think they pay more **attention to quality of life** than people who consume conventional food.
- ◆ In general, eating organic food implies going shopping every day or going to different shops: this is impossible for people who do not have **time**. It means changing their own buying behaviour and habits. People not interested in their eating behaviour give a little attention to food quality and to the quality of life in general

“... we live from what we eat...”

- ◆ Organic consumers prefer to go shopping in **specialised shops**: they trust people and certain product brands . In supermarkets they find products they do not know and for this reason they become a bit sceptical, even if

“... I do not think that a big supermarket, such as COOP, would risk its image by not following any compulsory rules necessary for the certification of organic products...”

- ◆ Since non-regular organic consumers do not trust organic production much, they do not want to spend more for products which they do not feel confident in.

2.2 External determinants

2.2.1 Cultural determinants

As already discussed in the introduction, there are many differences in organic consumption between northern and southern Italy. This diversity arises from cultural differences: in the north of Italy a high proportion of people are used to eating in restaurants, or to eating fast food or pre-cooked food and only a minority of consumers spend time in real cooking. On the other hand, people in the south of Italy are used to cooking by themselves, they spend time preparing home-made food and have a deeper gastronomic culture which they want to protect.

- ◆ In general, **information** about the importance of food in daily life is non-existent because of the power of consumerism which influences people to buy the range of products which are promoted in the media. Big companies have no interest in informing the community about the risks and damage of unhealthy nutrition because it is against their economic interests.

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Information is not sufficient, although it is very important in building a correct food culture based on organics:

“... I think information is not sufficient...”
“... there is no information about organic products...”
“... information is biased...”

but information is perceived as very important

“... information is fundamental to become aware of what we are eating”

- ◆ The message received through the media is confused

“... what is an organic product, what does it mean in terms of food quality, what are the implications of organic farming on the environment and on health...”

- ◆ For these reasons information/communication should be:
 1. clear: it is necessary to use simple terms understandable by “*my neighbour*”
 2. easily accessible: it is important that information about organic products reaches consumers and not that consumers have spend time and effort becoming informed
- ◆ **Advertising** is a tool that could develop the transmission of information about organic products and increase their consumption. Organic advertising has a strong influence in shaping food culture and its development in a media-rich world, more than recipe books.
- ◆ For many of the regular organic consumers, having the right information, which means knowing the benefits of appropriate nutrition (made possible with organic food) or the risks of eating conventional food, is fundamental to “**becoming educated about organic food**”.
- ◆ According to non-regular organic consumers, **cultural differences** between southern and northern of Italy influence consumer behaviour. The north is more informed and educated, with people more conscious about their purchases while in the south people are not informed about organic products, and there is a low level of schooling and education.

2.2.2 Social determinants

- ◆ **Differences between social classes** also influence consumers’ behaviour. Cost of organic products is high and for this reason only people with a higher income can afford this expense: organic products seem to be aimed at an elite. For regular and non-regular consumers, low income is the main reason that limits the regular purchase of organic products.
- ◆ For non-regular consumers, moreover, the **availability of organic products in supermarket** is important: if organic products are only available in organic shops, organic farming will remain a niche market. For this reason is necessary to develop distribution channels, but

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“...if organic are more widely distributed in supermarkets, it is very important to inform people about these kind of products because if people are not well informed they will continue to choose food that costs less...”

2.2.3 Economic determinants

Nothing specific has arisen from verbatim concerning economic determinants, but it is important to stress the fact that in the south of Italy the level of per capita income is different from the north of Italy: in general, people have a lower income in southern Italy.

3 **Motives/Drivers and barriers and their impact on organic food purchase**

3.1 **Image of organic products**

Organic food is perceived by regular organic consumers as healthy, having a good taste, clean, expensive, high quality and certified.

Health. A high percentage of consumers perceive organic products as healthier than conventional ones. Eating wholesome products helps people to prevent illness or risk derived from food contamination.

Good taste. The better quality of organic products is recognisable through its taste for many consumers

...”the taste of organic products is authentic, appetizing...”

“Clean”. Most of the consumers think that eating organic food means eating in a different way, something clean, without chemical additives, genuine.

Expensive. Cost of organic products is too high for a part of regular consumers; families with a low income are not able to afford this expense and they are obliged to eat low quality products.

Higher quality. In describing the characteristics of organic products, for one of the consumers the quality of conventional products is not even comparable with the quality of organic product: organic products are superior.

In general, regular organic consumers have a high respect of nature. From this point of view, they do not accept intensive farming, they want agriculture which protects the environment, which does not over-exploit the natural resources of land. Agriculture should follow the natural rhythm of nature, without forcing it in any way. For this reason, no pesticides should be added to land. For one consumer, certification proves this kind of respect for nature.

Moreover, an interest in respect for human rights has been shown by some regular consumers. They would appreciate it if organic products are sourced from farming where human rights have been

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respected; to prove this a form of ethical certification could be created and displayed on organic products.

Non-regular consumers perceive organic products as healthy, clean/pure, expensive, having a good taste but with a poor appearance, of regional origin, respectful of the natural organic rhythm of the land and certified.

Health. There was a general agreement on this aspect:

“... at the very least it is identical to the conventional product, it cannot be bad for my health...”

“Clean”/pure. Without any chemical additives (general agreement too)

Expensive. The price is too high for a high percentage of non-regular consumers.

Good taste. For a high percentage of consumers, taste of organic products (especially fresh ones) is different, perhaps because people are no longer used to eating genuine products; the taste reminds some people of the *“how fruit and vegetables used to taste”*.

Regional origin. This refers to fruits and vegetables: if fresh organic products come from foreign countries they may be damaged from the transport.

Bad appearance. For some consumers, the appearance of organic fresh products is poor: the fruit look shrivelled.

Seasonal product. If people respect the natural organic rhythm of the land, we can eat just seasonal products: this is the vision of one consumer.

Product certified. For one consumer, it is a product which has a guarantee and for this reason reliable.

In general, non-regular consumers think that organic production respects the natural rhythm of nature, there is no intensive farming and products obtained are always seasonal. As a result, large sizes and vivid colours could be lost during the production process, but the objective of organic agriculture is to obtain wholesome products, which does not necessarily mean products that look good.

Two visions come to the surface: some non-regular consumers think that organic farming makes it possible to bring back the way products used to taste, and according to this perception organic farming reminds them of farmers 50 years ago, before major technical advances.

On the other hand, some non-regular consumers stress the fact that organic farming is not the agriculture of the past, organic farming uses technological innovation and tests techniques which are expensive but allow farmers to obtain wholesome products, while the agriculture of the past was very risky and often unsuccessful (for example, resulting in famines).

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3.2 Actual and potential motives

3.2.1 Actual motives – regular organic consumers

Regular organic consumers prefer to buy organic products in **specialized shops**, because they trust people they know. More specifically, they are used to going back to the same shop to create a friendly relationship with the owner, in this way they

“...know where products come from...”.

One consumer who regularly consumes seitan, tofu and tempè feels certain that these kind of products are not genetically modified in organic shops:

“... it is very difficult to find a brand which states that the product is not genetically modified...”.

One other regular consumer, if they do not go to an organic shop, prefers to buy in a **small** shop or at a **market** where

“...origin is quite certain...”.

In any case, he feels protected, when the word ‘organic’ is marked on the product:

“... certification has been made and the label is a guarantee for the consumer ...”.

But someone else does not feel certification is a guarantee:

“... the idea of organic is linked to the knowledge of the farmer...”.

He would feel more certain if there was a relationship with producer or if there was a buyer's group selecting the products to buy. The idea is

“...getting to the product's origin...”.

As already mentioned, for many regular consumers to consume organic food is a “act of faith”: farmers can produce organic unethically and people who manage certification may or may not be honest, but this is possible in every realm. To be sceptical is human, but

“...since I cannot know whether or not things are produced following the rules, I want to hope that some people don't just produce organic to make money...”.

was discussed only from the point of view of the integrity of the certification body and whether consumers should trust it or not; what some regular consumers would like is another form of certification which guarantees respect for human rights.

Moreover, products from regions that are historically more aware about organic products (such as Tuscany or Emilia Romagna) make regular consumers more trustful.

For one consumer, firms should be **transparent**: traceability (for example, the origin of some ingredients) is a way to obtain trust from consumers.

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Large farm **size** (cooperatives of 100 farmers or more) ensures better controls. For one consumer large farm size assures traceability systems which are very important to guarantee a good product's quality.

3.2.2 Actual motives – non-regular organic consumers

For many non-regular consumers buying organic products in **supermarkets** is more practical: it is a question of habit and shopping this way involves less time and effort. Supermarkets give security to consumers because they have no interest in cheating people: they give high priority to their image. In general, consumers trust supermarkets.

As regards the products themselves, some consumers prefer to buy meat in supermarkets because there are more controls; moreover in supermarkets there is butcher's section where you can have the same relationship you would have with an independent butcher. For the same proportion of other consumers, meat should be bought in a known butcher because the problem is

“...who is able to guarantee the product I buy?...”:

if the consumer knows the owner, he can ask where he buys the meat and this is a form of guarantee.

Some non-regular consumers prefer to buy organic products **directly from farmers**, even if products are not certified: this because they know the farmer and, as a result, they trust the products. Moreover, if farmers are close to the consumers, the consumer perceives a higher level of guarantee of the product's quality. This close relationship between consumer and farmer has been seen as the strongest common element in all the 4 OMIs analysed: to know the farmer, the farm and the product without intermediaries gives the consumer greater guarantees about product quality. The consumer feels they have a reliable relationship with the farmer.

Even if not all non-regular consumers think the same way, some have trust in organic **certification**; one of them thinks that organic products should be easy to identify thanks to the label which guarantees the product to the consumer: he needs to perceive a difference between organic and conventional products. Another non-regular consumer thinks that organic products should not be sold in supermarkets but in more refined shops, where it is possible to supply organic products made by well-known firms (not available in supermarkets) direct to richer and more cultured people.

In addition, some of non-regular consumers would buy organic products from foreign countries (Switzerland, France, Germany): the important point is that they are certified.

Different opinions arise about the **size** of organic companies: some non-regular consumers trust large companies because they cannot act wrongly because of the potential threat to their image; moreover, if a big company decides to diversify into organic products, it makes a sound decision to do so based on in depth research about the market. For one consumer, if a well-known company (such as Barilla or Divella) starts to distribute regional organic products it could motivate them to consume organic products.

On the other hand, other non-regular consumers trust small companies because they are easier to control:

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“...I do not know if all the farmers in the cooperative act in the same way...”

Also for one non-regular consumer, **transparency** is very important. Producing organic products should not just be a business; for instance, it is also important to protect the environment:

“...an organic farm that goes and dumps animal carcasses who knows where, is not transparent and so does not deserve to be trusted”

For another consumer, **traceability** is very important because it gives consumers greater guarantee: not just the product but also the production process is guaranteed. This is true particularly in the case of meat.

3.2.3 Potential motives – regular consumers

Regarding the actual motives which influence people in buying organic products, there are some potential motives/factors which, in the future, could induce farmers to increase their organic production and encourage people to consume organic products.

In the list below, the figures in brackets refers to the frequency of regular consumers mentioning the factor.

Political factors

- ◆ Contribution from European Community: there is interest from the EU in inducing farmers to growing organic products (4)
- ◆ European Community promotes knowledge of organic products in terms of respect for health and respect for the environment (1)

Environmental factors

- ◆ Environmental disaster has really shocked those Italian consumers who taken the decision to eat only organic products (3)
- ◆ Energy crises (1)

Socio-economic factors

- ◆ Food scandals in the conventional sector: people have died of food poisoning and this has moved consumers' attention towards organic products (3)
- ◆ An evolution in the food sector: over the next 20 years this evolves without any food scandals; it can evolves because there was a change in the relationship between economic and political sectors (2)
- ◆ More information about organic farming involves people buying organic products and making farmers more aware and more respectful of the land and of the environment in general. In addition, more education in schools makes people more aware about benefits of organic products (6)
- ◆ Lower prices (3)
- ◆ Economic interest in producing organic, including interest from multinationals (1)
- ◆ Organic globalisation (1)
- ◆ To promote research in organic farming (1)
- ◆ Reverse of depopulation of rural areas (1)

Individual factors

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- ◆ Changing eating habits: no longer do so many people decide to eat fast food, they have more time to do food shopping, more time for cooking, and pay more attention to food. (2)
- ◆ Men have a different role: more attention to food, more involvement in food shopping and so on (1)
- ◆ Environmental conscience: it is important to become aware about the importance of health and the environment. People's attention should be directed to gaining general well-being, not just to having economic benefits. (1)
- ◆ Consumers are afraid about food contamination (3)

3.2.4 Potential motives – non-regular consumers**Political factors**

- ◆ Contribution from European Community: it is the main reason for the development of organic farming (7)

Environmental factors

- ◆ Environmental disaster: environmental impact of conventional farming causes the land to be poisoned and induces desertification of large areas which leads to an irreversible situation. (1)

Socio-economic factors

- ◆ Food scandals in conventional sector: people start to think about food and its consequences on health as the result of a single food scandal (as was the case with BSE); a food scandal could increase the consumption of organic food (6)
- ◆ More information about organic products helps people to become more aware and to take more care of themselves. (1)
- ◆ To promote research in organic farming (1)
- ◆ Lower prices (3)
- ◆ Economic welfare: a reasonable level of welfare means that people can spend more on food in general and therefore have more money for organic products, since organic products are more expensive than conventional ones. (1)
- ◆ Plan areas for organic farming development. (1)

Individual factors

- ◆ Changing consumer habits and mentality: new generations have changed their way of thinking, people are finally becoming more aware and have understood that eating wholesome products make you feel better, there is a new culture of eating and taking care of yourself. (7)
- ◆ More trust in organic products (1)
- ◆ Ecological conscience: eating organic products does not mean just eating a wholesome products but also eating a product which has been produced with a lower environmental impact. (1)

Technical factors

- ◆ New technology in organic production: to develop organic products innovation in production systems is necessary; new technologies, new alternatives to the traditional systems can eliminate farming which creates harmful products. (1)

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3.3 Actual and potential barriers

3.3.1 Actual barriers - Regular organic consumers

Some regular organic consumers show their disappointment about buying organic products in **supermarkets**, they do not like to buy there and they do not understand how it is possible that organic products are sold in supermarkets: there is a difference in the quality of organic products sold in supermarkets and those sold in organic shops.

Concerning the issue of certification, it is necessary to underline a general situation present in southern Italy. During its initial development, organic farming was experienced by regular consumers as a direct relationship between consumer and producer. In southern Italy in general, certification carried out by a certification body is mistrusted because people have grown used to widespread fraud (as already noted, consumers think that certification bodies may or may not be honest). For this reason consumers prefer to buy directly from the producer because they know the farmer and they trust him thanks to this close relationship. But it is quite clear that this situation does not allow the development of the organic market: if there is no trust there is no market development.

Certification of organic products, for some regular consumers, does not guarantee anything. Bodies who handle certification are sometimes not professional: they do not spend the necessary time and effort checking if products are really organic. In this case, for one consumer, the label on the product does not create trust. But, as already mentioned, there are also bodies that are honest in their work:

“...If you want to change your nutrition, which it is not so easy, you must have trust in what you buy, if you do not trust why change?...”.

On the other hand, one consumer does not trust certification by other countries (e.g. “tropical countries”):

“... I have no idea which rules have been applied to make up the control system...”.

Also products from northern Europe make people worried: countries like Germany, Great Britain have had food-related problems (BSE) and for this reason some regular consumers prefer to consume Italian products.

For one regular organic consumer, small farm **size** (15 farmers) does not ensure good controls: they do not have genuine controls on all the products they produce and they cannot provide any means of traceability which is very important in guaranteeing the quality of the product.

3.3.2 Actual barriers – non-regular organic consumers

Some non-regular consumers do not like to buy **directly from farmers** because they do not trust them: they often sell uncertified products.

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One consumer thinks that supermarkets contribute to scepticism: since products sold in **supermarkets** need certification for production, transport and so on, the probability of finding a real organic product seems to be low. As far as products are concerned, one other non-regular consumer does not like to buy meat at the supermarket: he does not have trust in it, but this doubt is probably not related just to the organic product in itself.

Concerning **delivery services**, several people do not trust this distribution channel for fruit and vegetables and for meat.

Non-regular consumers show their general distrust, in particular they (all men) do not have trust in **certification**: certification is private, farmers pay for the certification, the name of the certificatory body does not give people any guarantee, certificatory bodies do not have any interest in refusing certification because they are paid, there are too many certification bodies. Consumers are not sure that the higher cost of organic products, which pays for certification, gives the security of serious controls. Sometimes organic products are just big business, some people take advantage of the organic label just to charge a higher price. Some people care about the consumer and about organic in the deep sense of the word; for this reason organic products are sometimes not of the quality they should be if all rules were to be respected. From this perspective,

“... conventional products have reached a good level of quality which is why the higher price of organic products is not more justified...”.

The high bureaucracy which all farmers have to follow in order to be certified, induces farmers to look for a way out: one non-regular consumer underlines the necessity to simplify the procedures.

Concerning company **size**, some of the consumers do not trust small companies because these kind of companies have problems with organisation, are less controlled and are not able to assure a serious quality control. From this point of view, the fruit and vegetable OMI analysed is not considered trustful because it is too small.

On the other hand, other non-regular consumers do not trust big companies because they are difficult to control: they have political power, they entrust part of their work to other firms (for example if Barilla wants to produce beer, it cannot control the new production itself and must give another firm this responsibility). From this perspective, there is no trust in well known companies which decide to produce organic, even in their own region: there are too many economic interests behind such a decision.

3.3.3 Potential barriers

On the basis of the actual barriers which prevent people from buying organic products, it is possible to identify some potential barriers/factors which, in the future, could limit farmers producing organic products and people consuming them.

In the list below, the figures in brackets refers to the frequency of regular/non-regular consumers mentioning the factor.

It seems important to stress the fact that, concerning potential barriers, the discussion was not so deep as it was for the potential motives; moreover in what follows it is quite clear that there was not

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a high level of agreement on the subjects discussed and so only single statements came out in the analysis.

Regular consumers**Individual factors**

- ◆ Organic farming would not spread widely if consumption does not arise from genuine motivation on the part of the consumer, for example, on the basis of an external factor (economic, political) which induces people to buy organic products. People need to take time making their own decision to move to organic without being influenced: only in this way is the consumer aware of making a choice. (1)
- ◆ This situation also depends on the fact that food habits are uniform for many people and it is difficult to change. (1)
- ◆ People have different lifestyles derived from different cultures which influence behaviour affecting nutrition. (1)

Non-regular consumers**Socio economic factors**

- ◆ Prices too high (1)
- ◆ Lack of labour in general: since organic farming needs more labour than conventional farming, it cannot develop if there are no workers. (1)
- ◆ Poor information: organic products are not visible in supermarkets and it is difficult to identify them compared to conventional products. (1)

Individual factors

- ◆ Conventional products are perceived as not being bad quality (1)
- ◆ People pay no attention to food (1)

4 Meaning of regional origin and its impact on organic food purchase

4.1 Significance of regional origin for organic and conventional products

Regular consumers

For regular consumers in general, it is quite important to know the origin of the product at purchase and there is, for some consumers, a preference for Italian products. For one consumer, knowing the origin is fundamental because some labels are trustful and others are not:

“... from what I have heard, some control mechanisms are valid, some are less valid...”

Two consumers have opposing opinions about the importance of origin:

- ◆ on one hand the origin is important because some Italian regions have a historical tradition of, and competence in, organic production and are therefore more sensitive about organic (Tuscany, Emilia Romagna);
- ◆ on the other hand, even if some Italian regions have a recognisably wider experience of organic farming, own regional products are preferred in order to help the region to develop

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in this sector and because for fresh fruits and vegetables, local availability makes it possible to avoid long transportation which damages them.

Some regular consumers have expressed the desire to have exotic organic food or typical organic products: in this situation the origin is also important!

The lack of interest in local products has been expressed by some other regular consumers who are more interested in an exhaustive label (origin, who produces the product, respect for human rights, no exploitation of labour...)

“...which gives 360° certification of the quality of the product...”

There are different motivations because regular consumers prefer local/regional organic products, as already mentioned above:

- ♦ **avoiding long transportation:** this is related to fresh food which, as mentioned by several consumers, can be damaged during long transportation.

Moreover, for one consumer, fresh food should come from regions

- where there is a specificity for particular fruits or vegetables (for example: oranges from Sicily);
- during the right season.

However, concerning the choice between local fruit and vegetables and non local fresh products, consumers do not have a choice (from one regular consumer's point of view): in specialized shops there is no way of choosing the same type of fruit or vegetables from different origins and the problem is that you must trust what the owner says.

- ♦ **protecting the environment:** for some consumers, consuming local organic products

“... I contribute to the environmental conservation of the area where I live...”

Concerning the OMIs analysed, the idea of “promotion of the regional environmental development” was seen as an interesting factor for one consumer

- ♦ **relationship with the local area:** this means being conscious of the area where you live. This awareness, for several consumers, leads to contributing to local economy, developing biodiversity, promoting Italian agriculture and more specifically the regional specificity (*“... the south of Italy has great opportunity to develop thanks to the organic farming...”*).

Concerning the OMIs analysed, one of the factors listed for the cereal farm “support the local economy” was seen as a positive element for one consumer.

Non-regular consumers

There is not a unanimous vision about the importance of origin for non-regular consumers.

Some of them are interested in the origin of the organic food and, in particular, they would never buy foreign products:

“... I prefer to buy Italian products...”

But, as one consumer says, if rules about certification have not been observed, consumers could be induced to buy foreign products. Moreover, if foreign products give the consumer a higher level of

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security (for example, through a famous brand from a large, well-known company) then they may try the product; but sometimes it is just a question of curiosity.

On the other hand, some non-regular consumers are not interested in the product origin: what is important is the certification.

Italian products are preferred by non-regular consumers for the following reasons:

- ◆ **Local products are seen as high quality**
- ◆ **Avoiding long transportation:** this refers particularly to fresh products
- ◆ **No trust in foreign products shelf-life**
- ◆

4.2 Acceptance of OMIs from other/foreign regions

In general, the question concerning the acceptance of products from other/foreign regions is not so relevant in Italy.

In general, as already mentioned, there is a preference of Italian products in all the four product categories of related to the four OMIs analysed.

Both types of consumer have negative associations with organic fruit and vegetables from the UK: consumers do not trust their freshness, they think they are produced in greenhouses. In general, consumers do not consider possibility of buying fresh products from the Northern Europe: since it is possible to produce every type of food product in Italy,

“.... there is no reason to buy tomatoes from Holland...”

Concerning meat from France, regular and non-regular consumers have a negative approach because of the BSE problem which causes safety concerns for consumers.

“... when people speak about valuable meat, they are speaking about meat from Marche or Tuscany regions...”

Even if the meat from France seems to have more controls than meat from Italy, consumers would not buy the foreign meat. But some non-regular consumers are not interested in the origin of the products and they would buy foreign products so long as they are certified or quality products.

“...I would buy French meat provided it is quality meat...”

Interest is shown by one non-regular consumer for cereal and dairy farms because the presentation of the two OMIs satisfies his expectations about organic farming: protection of natural resources, visibility, protection of environment. These elements lead consumer to have greater trust in the farm.

In two situations some regular consumers are willing to buy foreign organic products:

- ◆ when all rules are respected and quality of product has been attained
- ◆ when people want to eat ethnic organic products

5 Consumer needs

5.1 Price

For both regular and non-regular consumers, prices are generally high, for all product categories. More specifically, for non-regular consumers, if organic products are sold only in organic shops they remain niche products and for this reason prices remain high.

5.2 Product

Regular consumers

Fruits and vegetables:

In general, the problem of availability of fresh products is very important for several regular consumers, in particular in their region (Apulia).

The element entitled “the combination of products depends on seasonal availability” has been viewed as a factor indicating a higher guarantee of professionalism for some consumers. As already noted, respect for the natural rhythm of land is a very common aspect in regular consumers' minds. On the other hand, there is a contradiction when the business partnership, in order to secure a wide product range, sources a small amount of fruit from outside the business: there is no guarantee of product control.

The “guarantee of regional origin of products” is also viewed by one consumer as a success factor for the OMI presented during the discussion. This is quite clear as regular consumers prefer local organic fresh products in order to avoid long transportation which could damage fresh food.

Milk

As underlined by one consumer, a guarantee of production techniques which assures high quality products is missing: what is the product guarantee about?

In general, there must be a guarantee of the origin of the dairy cows. For one other consumer: few dairy cows cannot guarantee the world distribution of milk. For this reason, it may happen that producers import milk from foreign countries, perhaps even uncertified, without informing consumers: this is a real problem present amongst dairy producers in Apulia and to avoid this problem the origin of dairy cows has to be guaranteed.

Meat

What is missing in the meat OMI, as stressed by one regular consumer, is the guarantee of a natural and appropriate animal husbandry, which implies no cruelty to cows and use of homeopathic medicines to treat them.

Non-regular consumers

Fruits and vegetables:

In the same way as with regular consumers, for several non-regular consumers the availability of seasonal products is an important element in the presentation of the fruit and vegetable OMI:

“... it is important to eat fruit only when it is growing on the tree ...”

A good number of non-regular consumers have the same opinion as regular consumers about the purchase of a small amount of fruits from outside the business in order to assure a wide product range: it is a contradiction and it seems to be the weak point of this OMI.

Country report**Milk**

Since some non-regular consumers are not able to see the real difference between conventional and organic milk, they would never buy from the organic co-operative presented during the discussion:

“... it is a question of taste, and not of security, which people should be able to appreciate...”

5.3 PlaceRegular organic consumers**Fruits and vegetables**

The idea of a home delivery service is viewed positively by some regular consumers since it is very difficult to find fresh products, even if, for other regular consumers, this kind of distribution does not make it possible for you to choose on your own. Moreover, from a practical point of view, a business partnership with 4 market gardeners is not capable of bearing the higher costs related to this way of distribution, as underlined by one consumer.

For some regular consumers, the direct contact between producer and consumer is also important because it allows the consumer to choose what he likes by 'phoning the farmer at home and talking to him directly.

Moreover, some other regular consumers stress the fact that short transportation and therefore the avoidance of any intermediaries are important elements in guaranteeing the freshness of products, decreased pollution, direct contact with farmer and the possibility of reduced costs.

In general, for several consumers it is necessary to organise distribution channels in order to avoid the problem of availability of fresh products. For example, in Apulia there is a high concentration of organic farmers but it is very difficult to find fresh fruit and vegetables.

Milk

Distribution in schools has had a positive effect on one regular consumer, as education was listed as one of the most important factors in the promotion of organic farming (see above).

Doubts arose for some regular consumers concerning the role of the wholesaler of the milk cooperative: it is not quite clear how so few producers organised in a cooperative can be wholesalers. They would have to have a thousand cows each because, as regular consumers know, in the organic system cows cannot produce more than a certain quantity of milk without forcing as happens in the intensive farming.

Cereals

Two regular consumers did not reach agreement concerning the presence of the organic restaurant: for one consumer, having an organic restaurant is a way for the OMI to spread organic farming and, therefore, it is another resource for consumers. But for the other consumer, having an restaurant is irrelevant.

Non-regular consumers**Fruits and vegetables**

For a good number of the non-regular consumers, a home delivery service makes it possible to save time shopping and should be used not just to sell fruit and vegetables. In this situation people have to trust the producer because he chooses for them and for this reason there should be a good relationship between consumer and producer.

But not all consumers like to leave the choice of fresh products to someone else: for several consumers this could be good for frozen food (even if there are some consumers who want to choose meat by themselves). It is quite clear, as pointed out by one consumer, that if the products that are delivered are not good quality, the relationship with that farmer would end.

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For another consumer, this style of distribution gives a higher guarantee of freshness and could be useful in promoting organic products: it could induce people to consume organic products.

But, since a home delivery services implies a trustful relationship between producer and consumer, one non-regular consumer has some doubts about it becoming widespread, and for this reason this kind of distribution

“... will remain a niche element...”.

Milk

Just as for regular consumers, for some non-regular consumers, distribution of milk in schools has had a positive effect: it means education, cultural transmission, the promotion of organic consumption.

In addition, one of them likes the fact that milk is sold in specialized shops: it is a question of mistrust of supermarkets.

Meat

The distribution of organic meat in supermarkets is seen positively by one consumer: it makes it possible to compare conventional products with organic products and to save time shopping. Some other consumers prefer to buy meat from a butcher because of trust.

Cereals

As for regular consumers, some non-regular consumers consider the distribution of organic cereals through organic restaurant owned by the OMI a good way to promote organic consumption: it is a way to educate consumers about organic culture.

5.4 Promotion

Regular consumers**Fruits and vegetables**

Direct contact between producer and consumer is viewed positively by almost all regular consumers, since speaking to consumers is a direct way for farmers to promote organic products.

Milk

For some regular consumers, it is also seen as an advantage that producers have a regional awareness (one of the factors listed in the milk OMI): this could be a very important element in promoting organic farming in their region.

Meat

Interest is shown by one respondent for the promotion of regional environmental development, since protection of the environment through the organic system is a very important element stressed by regular consumers.

Non-regular consumers**Fruits and vegetables**

As for regular consumers, non-regular consumers see the direct contact between producer and consumer as a very important element, and there is a general agreement on this: knowing the producer, the farm or co-operative without any intermediary gives a higher guarantee of professionalism. Moreover, this close relationship allows the consumer to find fresh local products.

Milk

The trustful relationship between producer and consumer seems to be a key element for the success of the dairy co-operative for almost all non-regular consumers.

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For one consumer, promotion of organic farming has been accomplished through the distribution of organic products in schools.

Cereals

For the cereal co-operative as well, closeness to consumers is seen as a strong success factor by most of the non-regular consumers.

The presence of an organic restaurant owned by the OMI is, for one consumer, a way to encourage people to consume organic products.

5.5 Organization type

Regular consumers

The small size of the cereal OMI is considered a positive characteristic, for some regular consumers, since it allows protection of natural resources, transmission of information to the consumer and support of the local economy:

“... small is beautiful...”

Moreover, a small cooperative is easier to manage than a bigger one. Also for fruits and vegetables, the business partnership of 4 market gardeners has had a positive impact for one consumer.

In one case, small is associated with wholesome products.

On the other hand, a co-operative of 15 farmers, such as the milk one, does not provoke interest for one regular consumer. A small co-operative has to diversify its product range and in consequence it no longer has full and genuine control of what it sells. Moreover, a small organization has a local and, for this reason, not such a strong, market, and the quality of products is not always guaranteed.

Some other regular consumers have more trust in large companies or co-operatives which can have effective control on what they sell and are not obliged to buy products from outside suppliers.

Moreover, for one consumer the more producers that decide to join a co-operative, the lower the cost that farmers have to bear for producing organic.

“... unity is strength ...”

On the other hand, for another consumer, a big co-operative is not considered as close to consumers as a small one. Moreover, another consumer stresses the fact that there are some management problems: for example, an organic co-operative needs double the number of technicians to assist farmers than a conventional co-operative.

In general, associations between producers, who have the same ethical views about organic farming, has been viewed positively by some consumers: they can make use of the same machinery, they can produce more and they become stronger.

Non-regular consumers

Small organisations are seen by one consumer as a positive element because they make it possible for the consumer to know the producers, especially if you live in a small town. But, specifically for fruit and vegetables, the small size of the business partnership presented during the discussion does not arouse trust in consumers because the company is not able to assure a good quality product; this depends, for some consumers, on the fact that small companies are less controlled.

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On the other hand, for some consumers, large companies (such as the organic meat OMI) guarantee that internal controls are respected: a small co-operative needs to sell all the products it produces to survive and has no way of offsetting any problems it has with part of its range, whereas a big company can lose part of its production suffering a great loss. However, some other non-regular consumers do not agree with this point of view: they think that a small farm is easier to control than a big co-operative where it is hard to know who acts correctly and who does not. From this point of view, the meat co-operative gives the impression to one non-regular consumer of an organization which is more interested in profit than in using the production system correctly, respecting the environment and consumer health: this co-operative does not have a true organic spirit.

Cooperation of different producers ensures, for some non-regular consumers, organisational professionalism. This is viewed positively, especially in the south of Italy where it is very uncommon to find big producers' associations such as the meat OMI.

The cereal co-operative gives several non-regular consumers a feeling of reliability, they are very well-organized, structured and transparent; moreover, for one consumer, the historical tradition in organic farming could stimulate previously mistrusting people to approach organic farming. Also the dairy co-operative has been viewed as well-organized and transparent by one other consumer.

5.6 Information

Regular consumers

Consumer information, one of the elements listed in the presentation of the cereal OMI, is an important factor for several regular consumers, which is lacking in the other OMIs.

There is a lack of information on how cows are fed and bred and on the cereal production process: in general, information about the production methods is a key element.

Non-regular consumers

Also for some non-regular consumers, information developed by the cereal co-operative seems to be important: the presence of the restaurant owned by the OMI is a way to transmit information about product, production techniques and origin. One consumer has this feeling:

“... it is like going to an agriturismo, in other words spending a few days holiday on an organic farm and having the opportunity to find out about products, eating organic products and, if I want, buying them...”.

It gives a feeling of reliability.

Spreading information, for one other non-regular consumer, is possible also through the distribution of organic milk in schools.

5.7 Advice, expectations and suggestions

What follows is a list of the main pieces of advice suggested by several regular and non-regular consumers for the wider development of organic farming.

Regular consumers

Country report**Lower prices**

Consumers come nearer to organic products if prices are lower. This is because many people have a low income and cannot afford this kind of expense. The development of direct contact between consumer and producer helps to lower the price.

Develop packaging

Regular consumers think that packaging of organic products should respect and reflect the ideology which is at the basis of organic farming; for this reason less packaging should be used, or should use recyclable materials. Moreover, the image of fresh products should be developed if a negative image of organic farming is to be avoided (*“there is always some mould on organic products”*).

Product diversification

This means reclaiming traditional/typical products, maintaining biodiversity, producing local varieties, or, more specifically, producing goat's milk in order to avoid illness or allergies derived from the use of dairy milk.

Transparency

Regular consumers need more guarantees about organic products and this could be achieved by making the whole process more visible; this transparency also concerns ensuring appropriate animal husbandry (no cruelty towards cows, no intensive breeding, no conventional medicines)

Promotion and advertising

For regular consumers, promotion developed by public bodies is fundamental to the development of organic farming (public information advertising). Moreover, comparative advertising is important to show the health benefits of organic products compared to conventional products; and segmented advertising could be a strong element in explaining better and in greater depth everything related to organic products (standards, certification bodies, label...).

Smaller portions of organic products

To promote organic products within small families, it is necessary to sell organic products in smaller portions.

Weekly market

To create a weekly market is a critical element for regular consumers so that they can get in touch with producers in their area, since, for regular consumers, it is fundamental that the direct contact between consumer and farmer is developed.

Information from firms and institutions

This is a very important element for regular consumers; since organic farming has a social dimension, and not just an economic one, information from public bodies (and specifically local authorities) and firms should be integrated.

Education

Education about organic farming in schools is fundamental: through guided farm visits it is possible to explain the natural cycle of farming; through the development of organic canteens children become used to eating wholesome food, and they, and their parents, become aware about the differences between organic and conventional food and able to inform others about the benefits of organic food:

“ ... children's canteens are the first link in the information chain...”

Moreover, it is necessary to educate parents that correct nutrition is healthy for their children and that this is possible through information obtained from children's doctors.

Producer associations

To create co-operatives, producer associations allow the development of the organic market: it is no longer just a niche market.

Country report**Consumers associations**

Farms could contact consumer associations to sell their products (as has already happened in Apulia with the association Biopuglia)

Non-regular consumers**Lower prices**

Also for non-regular consumers, it is necessary to drop the prices of organic products in order to have more regular organic consumers.

Develop packaging

Non-regular consumers suggest using recyclable materials for organic food packaging.

Traceability of product

Non-regular consumers suggest emphasising product traceability which gives consumers a higher guarantee that the product is organic.

Home delivery services

This kind of distribution should be used for a wider range of products, not just for fresh fruits and vegetables, because it allows to consumers to save time on shopping; in addition, home delivery services should be developed for old people.

Organic product tastings

Non-regular consumers respond positively the idea of outlets organising regular tastings of organic food: it could be a way to make organic products known to as many consumers as possible.

Advertising leaflet

Information on organic farming should be spread as much as possible, with an advertising leaflet delivered to people's houses or distributed with the product.

Promotion: media/newspaper

Another form of promotion could be through newspapers or other media.

Local fairs

Non-regular consumers would appreciate it if organic producers would sell their products at local fairs: in this way they could have a more direct relationship with farmers.

Information

To develop and spread information about organic farming is fundamental for non-regular consumers. Consumers should be informed about the benefits of eating organic products and the damage caused by unhealthy nutrition. Moreover it is necessary to educate/inform organic farmers: there are too many farmers who start to produce organic just for an economic reasons (the contribution from the EU) without having a deep knowledge of organic production.

6 Summary & discussion

The most important elements which come out of the discussion are:

1. In general, non-regular consumers are not well informed about organic products and they are not aware about the benefits of correct nutrition and damage caused by unhealthy eating.
2. Information and education seem to be fundamental to making people fully conscious of the food they consume.

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3. For regular consumers, eating organic food is a lifestyle choice, they pay attention to their quality of life and they think that organic food is healthier.
4. In general, regular consumers trust organic products, but, as with non-regular consumers, they think that certification bodies may or may not be honest and for that reason, certification does not always guarantee that product has followed all the requested rules or procedures.
5. For this reason, consumers in general prefer to have a direct relationship with the farmer: they trust people they know. But, in this way, the organic market will never develop: it will remain a niche market.
6. Consumers prefer local products and they are interested in supporting local economy and local area.
7. Regular consumers prefer to buy organic products in specialized shops while non-regular consumers buy organic products in supermarkets, since they find it more practical.
8. Organic products are seen by regular and non-regular consumers as healthy, “clean/pure” and expensive.

In general, these results should be referred to the specific socio-cultural environment where the focus groups were conducted, in the sense that they reflect habits and attitudes typical of Southern Italy.

But most of the above statements, as previous research and, in particular, focus groups conducted in 2001 in Northern and Central Italy (Zanoli & Marino, 2002) show, are applicable to all Italy. The most “localized statements” are 5 & 6: although a generalized preference for local/national products is expected in all Italian consumers, the direct relationship with the farmer is probably not as strong in the large urban areas of the North. In the Centre & the South even large urban areas inhabitants are more closely rooted in the rural world and the links are still quite strong; this may explain a higher request of “knowing” the farmer/producer/processor, which of course is – very often – an attitude which does not necessarily reflect in consequent behaviour.