


Subject:	ORGAPET Section C4: Expert Judgement Annex C4-1: Guidelines for the use of Delphi surveys, illustrated by its use in the Organic Marketing Initiatives and Rural Development project	
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Organic Marketing Initiatives and Rural Development (QLK5-2000-01124)

SWP 1.2: Delphi expert selection criteria (Final draft)

Type of experts

The experts invited to participate in the Delphi study should be able to contribute expertise on a variety of aspects of organic market development (commercial, policy, regulation, market intermediaries, social capital etc.). At the same time, the process should be open to experts with divergent perspectives who can generate a range of ideas. The aim of the exercise is not to build consensus, but rather to increase understanding and so it is important to include those who do not necessarily represent mainstream views; this includes ‘non-organic’ as well as ‘organic’ actors.

The expert panel should be made up of representatives from each of the following five categories:

1. Organic organisations
2. Other (non-organic) organisations (NGOs, farming unions etc.)
3. Research
4. Commercial organisations (including private consultancies)
5. Government agencies

Partners should aim to choose an even spread of panellists from each of these 5 categories, e.g. 4 from each group.

Moreover, the choice of panellists within each category should also be as evenly spread as possible. For example, in the category, Commercial Organisations, it is preferable to have a mix of representatives (processors, large and small-scale retailers, wholesalers, distributors etc.) rather than 3 supermarket representatives and 1 processor.

As far as possible the Delphi experts should not be those who are acting as key informants for the questionnaires in SWP 1.3, although this distinction might not be possible in countries with a small organic sector.

Number of experts

There will not be a 100% response rate, so the 1st round will start with a larger group (ca. 200). We are aiming to have ca. 50 experts in the 3rd round.

As there are considerable variations between countries in terms of size and the importance of their organic sector, some countries may choose to recruit more experts than the guidelines set out below, whereas the views held in other countries may be well represented by fewer experts. It is not necessarily important to have a perfectly ‘representative’ sample from each country.

During the recruitment process you may find it useful to prepare a list of ‘substitute’ experts that you can approach, if the original experts that you contact do not wish to participate. In this way, not much time will be lost in recruiting enough experts for the Delphi to go ahead.

Partner countries

Partner countries should initially select on average 20 experts. As mentioned above, some countries may be able to recruit more and some less. Prior to contacting experts, partners are requested to confirm their lists of experts with P1.

Subcontractor countries

Subcontractor participation in the Delphi is limited to the identification of experts in their country. We recommend that they identify at least 1 expert per category, i.e. 5 experts in total. In some cases this may not be possible, so flexibility is permitted. In countries with a larger organic sector, specifically Sweden, the Netherlands and Spain we suggest that more experts are identified. The choice of experts in subcontractor countries should be made in close cooperation with the responsible regional coordinator **and** workpackage coordinator, bearing in mind the languages into which the questionnaire will be translated (French, Finnish, German, Spanish). P1 should be informed of all experts identified by subcontractors by 16th March. The most appropriate way to approach these experts should be decided between the subcontractor and responsible regional coordinator.

To summarise:

5 categories

4 experts from each category = 20

8 partner countries each with ca. 20 experts = 160

11 subcontractor countries each with ca. 5 experts = 55

Total: ca. 215 experts

Revised timetable

Deadline	Activities	Progress
9 February	Expert recruitment: Draft invitation letter and Delphi leaflet sent to partners for comment	✓
15 February	Expert selection criteria and draft questionnaire sent to partners for comment	✓
20 February	Feedback received by P1 on draft letter	✓
23 February	Feedback on draft questionnaire received by P1; Final version of invitation letter sent for translation	✓ ✓
2 March	Final version of questionnaire sent for translation.	✓
16 March ¹	Subcontractor deadline for receipt of contact names Contact network finalised and invitation letter sent	
30 March	Questionnaires sent to participating experts	
20 April	Reminders sent to non-respondents	
11 May	Results of questionnaire translated and returned to P1	
15 June ²	Draft interim report prepared and circulated to partners	
24-26 June	Project meeting discusses interim draft review	
20 July	Revised draft circulated for comment	
3 August	Comments returned to P1	
31 August	Final version of report completed (MS4)	
1 September	Start of 2 nd round	

¹ In order to maximise response rates from experts, letters should be personalised and followed up with a telephone call.

² It may be possible to circulate the draft report a full 2 weeks in advance of the meeting, depending on how soon partners return the questionnaires to P1.

Information supplied to experts

Organic Marketing Initiatives and Rural Development – An introduction to the Delphi inquiry – February 2001

The Delphi method of increasing understanding about the future, or complex problems involving ambiguity, is named after the oracle of the same name in ancient Greece. Essentially, it is a method of sharing and integrating the opinions of a group of experts, without them having to be physically present at the same time. This leaflet is intended to answer some of the main questions for those invited to participate in this Delphi study, which focuses on organic markets in Europe.

What exactly is a Delphi inquiry?

A Delphi study can best be described as a process using iterative questionnaires, which enables experts to share their knowledge anonymously, on complex issues or systems. It has been used widely since devised in the 1940s by the Rand Corporation; its major applications have been in the fields of health, education and business.

It is carried out in successive rounds. Each one provides written feedback, compiled by the organisers, on the answers of the preceding round. Thus, the participating experts share in the formation of the joint perspective of the panel on the basis of their own, and the group, response.

Why carry out a Delphi inquiry?

The reasons for carrying out a study of this type are usually either a lack of formal data, or the complexity of or uncertainty about processes that affect the system being studied.

In this instance, rapid growth in the organic market, and the change that this means for the development of supply, marketing channels and consumer behaviour cannot be reliably analysed from existing data. Therefore the only way to understand the overall framework for future development is to draw on expert opinion, and this is best done by means of a Delphi inquiry.

What am I committing myself to?

Most Delphi inquiries gain enough information to conclude after 2-3 rounds. For this study, we envisage three rounds of questionnaires, with successively tighter questions to answer. For example, in the first round we may ask a few open questions, such as “*What do you think are the most important influences affecting the supply of organic products in Europe*” and encourage you to be as wide-ranging and reflective in your answer as you think appropriate. In later questions, we may, for example, ask you simply to state whether you strongly agree, agree, disagree, or strongly disagree with a statement such as “*The supply chain for organic dairy products is restricted by poor continuity of raw materials of sufficient quality*”.

Each questionnaire should take no more than 30 minutes to complete, although we would ask you, if possible, to read the questionnaires and consider the issues raised for a day or so before completing and returning them. This time commitment will be required three times over the coming year and a half.

What will I gain from the process?

The exercise will provide you with three main benefits, over different timescales:

- Firstly, the feedback process provides knowledge of what other experts and professionals involved in the European organic market are thinking, and an opportunity to benchmark against it;
- Secondly, participants will be provided with copies, in advance of general publication, of the major reports of the Organic Marketing Initiatives and Rural Development project on consumer demand and marketing initiatives; they will also receive regular updates on the progress of the overall project;
- Thirdly, participants will be offered the chance to participate in a seminar to develop scenarios exploring future possibilities in the European organic market, which will be based largely on results from the Delphi inquiry. Involvement will be limited, and so will only be possible for those completing all three rounds of the Delphi inquiry.

How can I get further information?

A team from Aberystwyth University is managing the Delphi inquiry. Further information concerning this exercise can be obtained by contacting them, or alternatively from the project partner which has contacted you. The scientist in overall charge is Professor Peter Midmore (plus contact details).

OMIARD Delphi Inquiry Round 1 Questionnaire (UK)

This questionnaire is the first of three, successively more refined requests for expert opinion on organic marketing initiatives in Europe. Our working definition of an Organic Marketing Initiative is any development, commercial or cooperative, involving the participation of organic producers, which improves the strategic marketing or addition of value to the basic product. We welcome comments on this as much as anything else in this questionnaire. In this round, the aim is to open up the subject and discover as wide a range of perspectives as possible. The aim is not to achieve consensus; therefore, please feel free to include your views, even if they are unusual or unpopular. There are six questions overleaf; there is also space for you to address anything that you feel we might have omitted at this early stage. Please continue your answers on additional sheets, if needed; if you would like to complete an electronic version of the questionnaire, please send a request by e-mail to Carolyn Foster at cjf@aber.ac.uk.

Please return the completed questionnaire in the enclosed freepost envelope, or by e-mail if you prefer. The returns from this round will be coded, analysed and returned to you in the form of an initial report; they will also be used to construct the second round of the questionnaire, which will indicate the proportion of those suggesting particular perspectives in returns to the first round. This questionnaire will be followed by a third, more specific request for information, after which it is anticipated that the Delphi inquiry will be complete.

For further guidance or assistance in completing this form, please contact the project leader: Professor Peter Midmore, Institute of Rural Studies, University of Wales Aberystwyth, Llanbadarn Campus, Aberystwyth, SY23 3AL. Tel.: 01970 622 251

Thank you for your participation at this stage.

- Q.1 What are the most important influences that have shaped the development of the organic market in your home country in the past 10 years? (Please describe key events if appropriate.)**
- Q.2 How would you describe the current state of the organic market (including regional variations, if any)?**
- Q.3 How do you expect the organic market to develop over the next 10 years? (Please include important new influences not discussed in previous answers.)**
- Q.4 Describe the role, if any, which organic marketing initiatives have played in contributing to developments and future potential.**
- Q.5 Have organic marketing initiatives had an influence on economic, ecological or social development in disadvantaged areas of your country?**
- Q.6 What characteristics make an organic marketing initiative successful? (Please give concrete examples, if appropriate.)**

Please use this space to raise any issues relating to the development of the organic market in Europe that have not been covered in previous questions.

This Delphi study is part of the “Organic Marketing Initiatives and Rural Development” research project being carried out with financial support from the Commission of the European Communities’ Fifth Framework Research and Development Programme, Contract No. QLK5-2000-01124.

Please return this questionnaire in the freepost envelope provided.

OMIaRD 2nd Round Questionnaire Delphi Inquiry (SW 2.2) January 2002

Susanne Padel, Carolyn Foster, Peter Midmore

This questionnaire is the second of three requests for expert opinion on the future development of the organic food markets and the role of organic marketing initiatives in Europe.

Based on the analysis of the result of the first questionnaire—sent to all participants at the end of 2001—, the aim of this second round, is to clarify some issues in relation to the historic development of the organic market in individual countries and to gain further insight into factors likely to further influence the future development including the role of government policy, organic marketing initiatives and their impact on rural development.

The questionnaire contains mostly closed questions and attitude statements, apart from a number of more open questions dealing with issues not widely covered in the first round. If your answer exceeds the space provided, please continue on an additional sheet if needed, identifying the number of the question to which it refers.

If you would like to complete an electronic version of the questionnaire, please send a request by e-mail to *{partners e-mail address!}*.

Section A Country-specific questions related to the historic development of the organic market

1) Country of residence:

2) Type of respondent

Commercial Organisation	Government Agency	Organic Organisation	Non-Organic Organisation	Research
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In our report of the first round of this Delphi we classified countries according to the state of development for organic market into three groups (please refer to the report p. 4 for a description of the classification).

Established (or mature) Market Countries	Growth Market countries	Emerging Market Countries
Austria Denmark France Germany Switzerland United Kingdom	Finland Italy Netherlands Norway Portugal Sweden	Belgium Czech Republic Greece Ireland Slovenia Spain

3) Do you agree with the category in which your own country has been placed?

Yes	No	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4) If you don't agree (q. 3) please could you re-classify your country?

Established	Growing	Emerging	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments _____

The responses to the previous round suggested that in some countries there may be considerable variation in the development of the organic market between different regions and between different products. Questions 5 and 6 are aimed at clarifying this.

5) Please indicate the state of the development of the organic market for urban and rural regions in your country.

	Established	Growing	Emerging	Don't know
Urban regions (near major centres)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rural areas (mainly agriculture)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other regions (please specify?)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6) Please indicate variation in state of the development of the organic market between different products in your country.

	Established	Growing	Emerging	Don't know
Meat products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dairy products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fruit & vegetables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cereal products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenience products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7) Which retail channels are currently most important in urban and rural regions in terms of volume of sales, for the distribution of organic products in your country? Please rank for the two types of regions in order of importance, with 1 being the most important retail channel.

	Urban regions / rank	Rural regions / rank
Multiple retailers and supermarkets		
Direct marketing (box schemes, farm shops, farmers markets)		
Specialist organic shops (stocking mainly organic produce)		
Specialist shops stocking some organic food (e.g. green grocers, bakers, butchers, health food stores)		
Catering/public services (hospitals, school restaurants, restaurants etc.)		
Other (please specify) _____		

8) What impact have food scares had the development of the organic market—overall and for specific product categories—in your country in the past? Please tick for impact on supply and demand.

		Positive	Negative	Negligible	Don't know
Overall	Supply side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Demand side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meat products	Supply side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Demand side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dairy products	Supply side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Demand side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fruit & vegetables	Supply side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Demand side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cereal Products	Supply side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Demand side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenience products	Supply side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Demand side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9) What impact had all regional or national government policies on the development of the organic market in your country in the past?

	Positive	Negative	Negligible	Don't know
Overall impact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meat product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dairy products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fruit & vegetables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cereal products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Urban regions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rural regions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumer demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10) What impact has the media had on the development of the organic market in your country in the past?

	Positive	Negative	Negligible	Don't know
Supply side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demand side	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

From the responses to the first round of all countries we have identified a number of major constraints to the development of the market for organic food—related to supply chains and demand—on which we would like your opinion.

11) Please classify the following constraints to the development of the supply chain according to their importance in your country.

	Very important	Important	Not important	Not at all important	Don't know
Low farm gate premiums for organic producers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low level of organic support payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of marketing know how among organic producers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited processing capacity for organic products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fragmented or underdeveloped marketing structures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor cooperation and communication in the organic movement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over-reliance on imports in retail sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of supermarket involvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of consumer demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competition from alternative production methods (regional speciality products)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12) How can the very important constraints for the supply chain be overcome?

13) Please classify the constraints to the development of the demand in your country in order of importance.	Very important	Important	Not important	Not at all important	Don't know
High consumer price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor availability (e.g. in specific regions or retail outlets)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor quality of organic produce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of common logo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of consumer information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of credibility of organic certification system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competition from near-organic alternatives (e.g. region of origin, gourmet foods, integrated production)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor product presentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of consumer awareness for nutritional, health and environmental issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

We would like your expert opinion on a number of questions related to the future development of the organic market.

[illegible]

16) Which retail channels will be most important for the future development of the organic food market in your country? Please rank in order of importance, with 1 being the most important retail channel.

	Rank
Multiple retailers and supermarkets	
Direct marketing (box schemes, farm shops, farmers markets)	
Specialist organic shops (stocking mainly organic produce)	
Specialist food shops stocking some organic produce (e.g. green grocers, bakers, butchers, healthfood stores, stocking some organic produce)	
Catering/public services (hospitals, school restaurants, restaurants etc.)	
Other (please specify)	

17) What regional variations between urban and rural regions in terms of retail channels do you expect?

From the responses in the first round a number of issues evolved that were considered important by some respondents for the further development of the organic market. We would like your opinion on a number of statements.

18) How important is the involvement of mainstream marketing channels (i.e. supermarkets) to the development of the organic market?

Very important	Important	Not very important	Not important at all	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Could you please briefly outline the main reasons for your answer:

19) Do you expect in the future an imbalance between domestic supply and domestic demand in your country? Please tick for each product one of the following categories.

	supply exceeds demand	demand exceeds supply	market is roughly in balance	don't know
Meat products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dairy products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fruit & vegetables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cereal products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenience products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20) Please indicate the level of your agreement with the following statements.

	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Organic food should be marketed as a premium, high quality product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supermarkets and conventional distribution channels are appropriate for organic products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The organic sector will grow independently of crisis in conventional agriculture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Promotion for organic food should be based on risks associated with conventional food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organic marketing should be clearly differentiated from the marketing of non-organic products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is inevitable that the organic food sector will develop on an agro-industrial scale to serve the requirements of mainstream customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reductions in consumer price premia conflict with the positioning and marketing of organic food as a high quality product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is inevitable that organic food as a premium, high quality product, remains restricted to a niche market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Different labels (for example 'organic' and 'organic+' products) can be used effectively to differentiate niches within the organic market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organic marketing structures need to improve, to be able to keep pace with the expected increase in demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Different sectors of the organic market require the development of different marketing structures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A common organic logo is essential to the development of demand for organic products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The involvement of mainstream marketing channels poses a threat to local, small-scale distribution channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is important to target new consumer groups (for example consumers of a different social category) in order to increase demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is important to increase product range (for example wider choice of different dairy products, introduction of convenience products) in order to extend the demand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cheap foreign imports are driving down the prices for organic producers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reductions in consumer price premia have a major role to play in developing demand for organic products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price premia for consumers will decrease with increasing volume of sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price premiums for producers will decrease once supply increases because of competition between producers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price premiums for producers will decrease because of the competition between various multiple retailers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Highly processed organic goods (for example convenience products) conflict with the organic aims	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Dominance of mainstream food companies in retailing of organic food will lead to the lowering of organic standards for commercial reasons	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trade in organic products between regions in Europe contradicts the basic philosophy of the organic movement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International trade in organic products with countries outside Europe contradicts the basic philosophy of the organic movement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section C Role of national and regional governments in future development of the organic market

21) How important is the role of national governments in developing the organic market?

Very important	Important	Not very important	Not important at all	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Could you please briefly outline the main reasons for your answer:

22) How important is the role of regional governments in development the organic market?

Very important	Important	Not very important	Not important at all	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Could you please briefly outline the main reasons for your answer:

23) Please indicate the level of your agreement with the following statements:

	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Governmental certification systems for organic produce are more credible for consumers than private sector schemes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production incentives for producers help overcoming problems in the supply of organic raw materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Financial support to organic producers helps to lower the price to consumers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial support to producers leads to oversupply and should be stopped in favour of marketing grants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conversion incentives for organic producers should target specific types of producers (for example fruit producers) to deal with supply constraints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National government should introduce and promote a common logo for organic produce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National government should run a common certification system for organic production in a country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Government initiatives are important in creating demand for organic produce	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is a need to develop common (EU) standards in new areas (for example fresh water fish production, glasshouse production)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is a need to consider the environmental impact of trade in the further development of organic standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section D Organic marketing initiatives and rural development

24) How important is the integration of organic agriculture with other initiatives, such as regional development or tourism initiatives for the future development of the organic market?

Very important	Important	Not very important	Not important at all	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Could you please briefly outline the main reasons for your answer:

25) How important is the role of organic agriculture in achieving rural and regional development objectives

Very important	Important	Not very important	Not important at all	Don't know
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Could you please briefly outline the main reasons for your answer:

26) Please indicate the level of your agreement with the following statements:

	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
The rate of growth in demand will lower the organic standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Direct links between consumers and producers are very important for the development of the organic market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The integration of organic with other premium product characteristics (for example fair trade, local origin, welfare friendly) is an appropriate strategy for the future development of the organic sector	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organic marketing initiatives (OMIs) can have a vital role in creating or safeguard jobs in rural areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organic Marketing Initiatives should continuously receive financial public support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The basic principles of good food marketing also apply to organic marketing initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OMIs must use conventional food marketing structures to contribute effectively to regional development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
'Organic' food marketing initiatives is likely to be more successful than a non-organic ones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The success of OMIs depends on understanding the market for their product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The success of OMI success depends on vertical and horizontal collaboration with all stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The success of OMI depends on a clear structure for decision-making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organic marketing initiatives must keep their distribution channels short and mainly trade within their region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Producers cooperation and associations have a role to play in securing 'fair' product prices for organic producers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section E Personal information

Finally, we would like you to give us some details about yourself. This information gives us some background for the analysis of the data, but will be treated strictly confidential.

27) What is you age?

Under 30	30-44	45-64	65 or over
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

28) What is your gender?

<input type="checkbox"/>	<input type="checkbox"/>
Male	Female

29) Do you have any training or qualifications related to organic food and farming?

If so, please specify:

30) What is your job title?

31) What type of organisation do you work in? _____

	Years	Months
32) How long have you been professionally involved with organic food or agriculture (please estimate in years or month)	<input type="text"/>	<input type="text"/>
	Yes	No
33) Do you buy organic food for your personal consumption?	<input type="checkbox"/>	<input type="checkbox"/>

Thank you very much for you time

This Delphi study is part of the "Organic Marketing Initiatives and Rural Development" research project being carried out with financial support from the Commission of the European Communities' Fifth Framework Research and Development Programme, Contract No. QLK5-2000-01124. Please return this questionnaire to: {Partner Address and e-mail}.

OMIaRD 3rd Round Questionnaire Delphi Inquiry (SW 5.1) March 2003

Susanne Padel and Peter Midmore

This questionnaire is the last of three requests for expert opinion on the future development of the organic food markets and the role of organic marketing initiatives in Europe. The aim of this third round is to consolidate and deepen insights derived from the previous two rounds and to explore other ideas resulting from other parts of the OMIARD project. It gives experts the opportunity to re-consider their views in areas where divergence of opinion emerged in the second round, largely in relation to factors likely to influence future development, the role of government policy and of organic marketing initiatives and their impact on rural development. Where appropriate, we have included your response to the same question in the previous round and the average response of the group. Please use this information to reflect on the reasons for your original response, and feel free to alter your reply in this round if you think it appropriate.

If you would like to complete an electronic version of the questionnaire, please send a request by e-mail to: ([Partners](#) e-mail address)

Country of residence

Serial number

UK COM 07

Introduction

Before going into detail, we would like to explain briefly our thinking in developing this final questionnaire. In line with the DELPHI method, in the Sections A, B and C we mainly repeat previous questions, asking you to re-consider your answers in light of the results of the second round. For this purpose, we have shown the results and your own answers in the questionnaire. In several cases answers have been converted into numerical scores, how this was done is explained in each question. We have omitted questions that achieved a clear result in the first round, but for easy comparison with the second round have kept the numbering of the questions the same, so that several numbers are missing. Throughout the questionnaire we have included short explanations in relation to the previous round. However, if you would like more detail on the results of the previous rounds, please refer to the reports that were sent to you. In some questions with attitudinal statements we have included some new ones derived from responses to the open question and comment sections in the second round.

Section D on Organic Marketing Initiatives (OMIs) has been expanded to include new questions and attitude statements, derived from some open questions and from other work in the project. This may not be in fully line with the DELPHI method in the strictest sense, but we believe that it best serves the needs of the overall project at this stage. This section also includes our working definition of an Organic Marketing Initiative.

Throughout this questionnaire we have used mainly closed questions with pre-formulated answers, but this does not mean we don't welcome your comments. Please feel free to add further comments on an extra page, repeating if appropriate the question-number to which they refer.

We would also like to thank you for your time and support to this DELPHI and hope that some of the results provided from this and other parts of the project as a whole are also of interest to you.

Susanne Padel

Peter Midmore

Section A Country-specific questions related to the historic development of the organic market

In the first round of the DELPHI, we proposed a classification of countries according to the state of development of the organic market into three groups: Established, Growing and Emerging Market Countries. The categorisation is based on a multidimensional impression of the experts rather than quantitative data and should be used alongside other "hard" categorisations, for example as presented by Hamm et al. (2002).

The classification was largely confirmed by the responses to the second round. However, based on the results France was reclassified as belonging to the group of countries with growing rather than established markets. For the UK, Sweden and Belgium a significant number of experts (but not the majority) did not agree with the proposal and in these countries only we would therefore like experts to reconsider the classification once again.

Established (or mature) Market Countries (EST)	<i>Growing Market countries (GRO)</i>	<i>Emerging Market Countries (EMG)</i>
Austria Denmark Germany Switzerland United Kingdom	France Finland Sweden Italy Netherlands Norway	Belgium Czech Republic Greece Ireland Slovenia Spain Portugal

In the second round, most respondents clearly considered markets in urban areas to be more developed than in rural areas, and markets for cereals, dairy products and fruit and vegetables to be more developed than those for meat and convenience products. The respondents agreed about the current importance of sales channels, which is confirmed by other project results. There was also widespread agreement in relation to questions about the impact of food scandals and the media, so there is no need to repeat any of these questions. Please refer to the report of the second round Delphi for detailed results.

In the previous round, we asked: "What impact did regional or national government policies have on the development of the organic markets in your country in the past?" Respondents agreed that governmental policy has had an impact on some specific markets and a greater impact on urban than rural areas.

In the following table, national average responses are shown next to your own answer to parts of this question to allow you to reconsider your answer. Given the focus of the project we are particularly interested in the impact of policy on markets in rural areas and would therefore like to ask those experts that consider this to be negligible to briefly outline the reasons for their answer.

9) What impacts have regional or national government policies had on the development of organic markets?						
	<i>Responses 2nd round</i>		<i>Own response</i>	New answer		
	<i>Positive</i>	<i>Negligible</i>	<i>1= positive 0= negligible d= don't know</i>	<i>Positive</i>	<i>Negligible</i>	<i>Don't know</i>
Overall impact	69%	25%		X <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Urban regions	51%	39%		X <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Rural regions	39%	47%		<input type="checkbox"/>	X <input type="checkbox"/>	<input type="checkbox"/>
Consumer demand	45%	47%		<input type="checkbox"/>	X <input type="checkbox"/>	<input type="checkbox"/>

9a) Reasons for low impact on markets rural areas

Because there's simply been very little coherent attempts to undertake government support of such markets

In the previous round, we asked you to classify constraints of supply and demand in the organic market in order of importance and to suggest how the important ones could be overcome. In the following two tables, these are presented with the national average scores they received, showing that for a number of constraints no clear rank order emerged. The list of suggestions was used to include two additional constraints in the lists below and will also be used in other areas of the project.

In the following two questions we are asking you to compare your own answer with the national average and change it, if you want to give greater or lower importance to some of the concerns.

11) Please classify the constraints to the development of the organic supply chain according to their importance

	2 nd round		New answers					
	Average score	Own answer		Very important	Important	Not important	Not at all important	Don't know
<i>+2 = Very important, +1 = important, -1 = not important; -2 = not at all important</i>				+2	+1	-1	-2	
Low farm gate premiums for organic producers	1.2			x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low level of organic support payments	1.1			x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of marketing know how among organic producers	1.0			<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Limited processing capacity for organic products	0.1			<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fragmented or underdeveloped marketing structures	0.8			<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor cooperation and communication in the organic movement	0.7			<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Over-reliance on imports in retail sales	1.3			<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of supermarket involvement	-0.5			<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lack of consumer demand	-0.1			x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competition from alternative production methods (such as regional specialities, integrated agriculture)	-0.5			<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of information for converting and organic producers	"New"			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>
Limited availability of organic inputs (e.g. feeds)	"New"			<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13) Please classify the constraints to the development of demand for organic products according to their importance

	2 nd round		New answer					
	Average score	Own answer		Very important	Important	Not important	Not at all important	Don't know
<i>+2 = Very important, +1 = important, -1 = not important; -2 = not at all important</i>				+2	+1	-1	-2	
High consumer price	1.4			x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor availability	1.1			<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor quality of organic produce	0.2			<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of common logo	-0.4			<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of consumer information	0.6			x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of credibility of organic certification	-0.7			<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competition from near-organic alternatives	-0.7			<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor product presentation	0.2			<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of consumer awareness	0.7			x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section B Future development of the organic market

In the previous round, we asked you to anticipate the growth rate (% per year) for organic retail sales in your country in the next 5 years. Based on the responses, we have calculated an overall average growth rate for each country, and rates for specific product categories and for urban and rural markets. Although we are aware that circumstances might have changed, we would like you to consider the calculated growth rates for your country and either express agreement or propose alternative rates in the box to the right. If you do not agree, could please also briefly outline your reasons below

15a) Expected growth rates for the organic retail sales (% per annum) in the next five years			
	UK	Agree	Alternative rate
Overall	8.4	x <input type="checkbox"/>	
Convenience pr.	8.4	x <input type="checkbox"/>	
Meat products	7.3	x <input type="checkbox"/>	
Dairy products	6.3	x <input type="checkbox"/>	
Fruit & vegetables	6.3	x <input type="checkbox"/>	
Cereals products	5.8	x <input type="checkbox"/>	
Urban regions	7.8	x <input type="checkbox"/>	
Rural regions	5.1	x <input type="checkbox"/>	

15b) Reasons for non-agreement and/or alternative rates

In the second round, we asked you which retail channels you consider to be most important for the future development of the organic food market in your country, and to explain the expected variation in the importance of retail channels between urban and rural regions. Many respondents did not expect a clear distinction in the future.

We have used the results to calculate an average rank order for the future importance of retail channels in urban areas show below. In the following question we would like you to re-consider the average rank order for urban areas and propose a rank order for rural areas.

16) Could you please rank retail channels in order of <u>future importance</u> in urban and rural areas?			
<i>1= most important, 5 = least important</i>	Average ranks 2nd round	Rank for	Rank for
	EST*	Urban	Rural
Multiple retailers and supermarkets	1.1	1	1
Direct marketing	3.2	2	2
Specialist organic shops	3.2	1	2
Other specialist food shops (bakers, butchers, greengrocers)	3.4	1	2
Catering/public services	3.7	4	4

In the previous round it also became clear that most respondents consider organic markets in rural areas likely to be less developed compared with urban one and expect this trend to continue. Because these markets are very important for some Organic Marketing Initiatives in rural areas, we want to understand why this is the case.

17a) Please classify the following barriers to consumers in rural areas to purchase organic products in order of importance.

+2 = <i>Very important</i> , +1 = <i>important</i> , -1 = <i>not Important</i> , -2 = <i>not at all important</i> , d = <i>don't know</i>	Very important	Important	Not important	Not at all important	Don't know
	+2	+1	-1	-2	d
Consumers in rural areas are less health conscious	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Many grow vegetables in their own gardens	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reduced availability of organic products in rural areas	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumers in rural areas are less concerned about the environment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rural consumers have solidarity with ' <u>conventional</u> ' farmers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lower disposable incomes in rural areas	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
'Local' is more important than 'organic' for rural consumers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumers in rural areas are less concerned about animal welfare	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
'Lifestyle' food culture is restricted to urban areas	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In the previous round, we asked you about likely future imbalances between domestic supply and demand for product categories, but no clear picture emerged. The question has now also been covered in greater detail by another survey of the organic food market in this project (see Hamm et al., 2002) and is hence not repeated here.

In the previous round, we also presented you with a number of statements related to the future development of the organic market. Several attracted clear agreement or disagreement, so we have omitted those from the list. For the statements in the following table, we would like you to re-consider your answer in the light of the results. We have also added a number of new ones derived from answers to open questions.

20) Please indicate the level of your agreement with the following statements.							
+2 = <i>strongly agree</i> , +1 = <i>agree</i> , -1 = <i>disagree</i> , -2 = <i>strongly disagree</i>	2 nd round		New answer				
	Av. score	Own score	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
The organic sector will grow independently of crisis in conventional agriculture	1.5		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organic marketing should be clearly differentiated from the marketing of non-organic products	0.6		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

It is inevitable that the organic food sector will develop on an agro-industrial scale to serve the requirements of mainstream customers	0.7		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Reductions in consumer price premia conflict with the positioning and marketing of organic food as a high quality product	0.9		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Different sectors of the organic market require the development of different marketing structures	0.6		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
The involvement of mainstream marketing channels poses a threat to local, small-scale distribution channels	1.3		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Cheap foreign imports are driving down the prices for organic producers	1.2		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Reductions in consumer price premia have a major role to play in developing demand for organic products	0.9		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Price premiums for producers will decrease once supply increases because of competition between producers	0.5		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Price premiums for producers will decrease because of the competition between various multiple retailers	0.8		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Dominance of 'mainstream' food companies in retailing of organic food will lead to the lowering of organic standards for commercial reasons	1.0		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
International trade in organic products with countries outside Europe contradicts the basic philosophy of the organic movement	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
New statements								
Direct marketing offers an alternative to mainstream outlets for producers in disadvantaged rural areas	n/a		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
In future more consumers will prefer to buy directly from the producer as an alternative to the increasing globalisation of the organic food market in multiple retailers	n/a		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Public procurement will become an important alternative outlet for organic producers in rural areas within the next three years	n/a		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Regionalisation of organic sales (also in supermarkets) will increase consumer trust	n/a		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

Section C Role of national and regional governments in future development of the organic market

In the previous round, respondents clearly recognised governments as important in developing the organic market, particularly in countries with well-established and growing organic markets. The responses largely reflected the known variation of governmental support throughout Europe and we therefore decided not to repeat the general questions.

In the previous round, we also presented you with a list of attitude statements in relation to the role of government. As above we have omitted statements that attracted clear agreement or disagreement, but would like you to re-consider your answers to the remaining statements.

23a) Please re-consider/indicate the level of your agreement with the following statements:								
	2 nd round		New answer					
<i>+2 = strongly agree, +1 = agree, -1 = disagree, -2 = strongly disagree</i>	Av. score	Own score	Strongly agree	Agree	Disagree	Strongly disagree		Don't know
Governmental certification systems for organic produce are more credible for consumers than private sector schemes	0.8		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Production incentives for producers help overcome problems in the supply of organic raw materials	0.8		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Financial support to organic producers helps to lower the price of organic products to consumers	0.5		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Conversion incentives for organic producers should target specific types of producers (for example fruit producers) to deal with supply constraints	0.9		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
National governments should introduce and promote a common logo (such as in Denmark) for organic produce	-0.3		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
National governments should run a common certification system for organic production in a country	-0.5		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Government initiatives (for example a public campaign on the benefits of organic production) are important in creating demand for organic produce	0.4		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
New statements								
Confidence in the future of the organic market for all actors is not related to government support	n/a		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
National and regional governments interfere in the organic market through buying organic products for public canteens, such as schools and hospitals	n/a		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>

Section D Rural Development (RD) and Organic Marketing Initiatives (OMIs)

In this section we repeat all questions that we asked in the previous round because the answers varied considerably, but we have taken out some and added some other statements in. We have added several new questions related to Organic Marketing Initiatives at the end.

From our research so far we have developed a definition of an Organic Marketing Initiative (OMI) and we give you the opportunity to comment on it.

“An OMI is an initiative (privately or cooperatively owned) involving the participation of organic producers, which improves the strategic marketing position of the producers by adding value to the raw product through processing or marketing”

23b) Would you like to comment on the definition?

Why does an OMI NOT involve processors, manufacturers or retailers? In other words, should not an OMI involve ALL supply chain actors?

In the previous round we asked you about the need for integration of organic agriculture with other rural development initiatives and the role of organic agriculture in rural development. In this round we have repeated two questions and would like you to re-consider your answers, and have also added a new question.

24) How important is the integration of organic agriculture with other rural development initiatives (such as regional branding or tourism) for the future development of the organic market?

(+2 = very important; +1 = important, -1 = not important; -2 = not at all important)

2 nd round		New answer					
Average	Own answer	Very important	Important	Not important	Not important at all		Don't know
1.3		x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

25a) How important is organic agriculture in achieving rural and regional development objectives?

(+2 = very important; +1 = important, -1 = not important; -2 = not at all important)

2 nd round		New answer					
Average	Own answer	Very important	Important	Not important	Not important at all		Don't know
1.3		x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

25b) How important is the integration of organic agriculture with other rural development initiatives (such as regional branding or tourism) for rural and regional development?

(+2 = very important; +1 = important, -1 = not important; -2 = not at all important)

		+2	+1	-1	-2		D
		Very important	Important	Not important	Not important at all		Don't know
		x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

In the previous round we also presented you with the possibility to outline the reason for your answer. Several themes emerged that have been used to develop new statements included in Question 26.

In the previous round we presented you with a list of statements in relation to Organic Marketing Initiatives (OMIs) and Rural Development. Those attracting widespread support were related to the fact that the same basic principles of good food marketing also apply to OMIs, to some success factors of OMIs, and the role that producer cooperatives can play in securing a fair price for organic producers. Clear disagreement was expressed to the statement that growth in demand will lower organic standards.

However, in relation to the following statements we ask you re-consider your opinion in the light of the results.

26) Please re-consider the level of your agreement with the following statements:

	2nd round		New answers					
<p>+2 = <i>strongly agree</i>, +1 = <i>agree</i>, -1 = <i>disagree</i>; -2 = <i>strongly disagree</i></p>	Av. score	Own answer	Strongly agree	Agree	Disagree	Strongly disagree		Don't know
			+2	+1	-1	-2		
Direct links between consumers and producers are very important for the development of the organic market	0.8		x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
The integration of organic with other premium product characteristics (for example fair trade, local origin, welfare friendly) is an appropriate strategy for the future development of the organic sector	1.1		x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Organic Marketing Initiatives (OMIs) can play a vital role in creating or safeguard jobs in rural areas	1.3		<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Organic Marketing Initiatives should continuously receive financial public support	0.2		<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Organic Marketing Initiatives must use conventional food marketing structures to contribute effectively to regional development	0.2		<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
'Organic' marketing initiatives are likely to be more successful than a non-organic ones	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		x <input type="checkbox"/>
Organic Marketing Initiatives must keep their distribution channels short and mainly trade within their region	0.2		<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

We have also added another block of new statements derived from comments and answers to open questions in the previous round in relation to the impact of Organic Marketing Initiatives on Rural Development.

27) Please indicate the level of your agreement with the following new statements					
+2 = strongly agree, +1 = agree, -1 = disagree; -2 = strongly disagree	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
Demand for organic products in rural areas is well enough developed to offer significant potential for Organic Marketing Initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> x
Organic farming provides a good example how the topic of sustainability and multifunctional agriculture can be explained to the rural population	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other initiatives for agricultural producers (e.g. regional origin labels) are likely to contribute more to the development of a region than Organic Marketing Initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> x
Other initiatives for agricultural producers (e.g. regional origin labels) represent serious competition to Organic Marketing Initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> x
Organic farming does not make an effective contribution to Rural Development, because environmental protection, rural employment are not covered by organic standards.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure development is more important for rural development than agriculture, organic or otherwise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> x
The share of organic farming in rural areas is too small for Organic Marketing Initiatives to have a significant impact on rural development	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organic farming contributes to re-population of less favoured rural areas, because organic producers have a better chance to survive and new small business are starting up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> x
Only organic Marketing Initiatives in advantaged rural areas (i.e. close to major markets) can achieve wider rural development aims that do not have direct economic benefit to their producers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> x

Finally, we would like to explore with you some of the ideas that have emerged so far from our research on Organic Marketing Initiatives, their impact on Rural Development and the implications for future national and European policies.

Our research has shown that Organic Marketing Initiatives in Europe can have a wide range of objectives, but that a number of barriers exist that may prevent them from achieving those.

30) Please classify the importance of the following barriers preventing Organic Marketing Initiatives from achieving their objectives.					
+2 = Very important, +1 = important, -1 = not important, -2 = not at all important	Very important	Important	Not important	Not at all important	Don't know

	+2	+1	-1	-2	
Small scale of operation	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of management	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intensity of labour input and availability of local labour	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficult decision-making because of direct involvement of the producers in the Organic Marketing Initiative	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shortage of capital for investment	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shortage of organic raw materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
High collection costs of raw material due a dispersed population of organic farms	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remoteness from major markets	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unclear and conflicting objectives	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of policy support for Organic Marketing Initiatives	<input type="checkbox"/>	x <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In the following question, we ask you to think of an Organic Marketing Initiative that you know well and to imagine that this Marketing Initiative would now involve conventional rather than organic producers and products.

31) How would the impact on the region be if an Organic Marketing Initiative would deal with conventional producers instead? <u>Then it wouldn't be an OMI!!!</u>						
+2 = very positive, +1 = positive, 0 = no impact, -1 = slightly negative, -2 = very negative, d = don't know	Very positive	Positive	No impact	Slightly negative	Very Negative	Don't know
	+2	+1	0	-1	-2	d
Local employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Income of suppliers to marketing initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Local environment and landscape	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
The attractiveness of the area for tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Use of local resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Long-term fertility of soils	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Animal welfare	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Community to organisation and action effectively	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Consumer confidence in regional products of the area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Infrastructure for processing, distribution and marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>
Regional culture and identity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	x <input type="checkbox"/>

32) Please classify the following instruments in terms of enhancing the impact of Organic Marketing Initiatives on Rural Development according to importance					
<p>+2 = <i>Very important</i>, +1 = <i>important</i>, -1 = <i>not Important</i>, -2 = <i>not at all important</i></p>	Very Important	Important	Not important	Not at all important	Don't know
Improved coordination of certification and labelling systems for organic produce	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incentives for producers to convert to and continue organic production systems to overcome problems in the supply of organic raw materials	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Targeting of conversion incentives for organic producers of specific product types (for example, fruit) to deal with supply constraints	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital grants to producer groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Training in business skills development for owners and managers of Organic Marketing Initiatives	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improved provision of market information on consumer trends for managers of Organic Marketing Initiatives	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initiatives to stimulate consumer demand for organic produce	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conversion of public land to organic farming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Enhancement of demand for organic produce through public procurement, particularly for schools and hospitals	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stability of government support systems, to increase confidence of all market actors in the future of the organic market	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you very much for you time

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Garrod best practice guidelines to be added