D4.3 Consolidated report on the qualitative findings

Work Package 4

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Executive Summary

This report presents the results of 32 expert stakeholder interviews and 8 consumer focus groups that examine consumer attitudes, values, expectations and preferences in relation to short food supply chains (SFSC). The interviews represented the perspective of consumers, producers, and other actors who work with or within SFSC (e.g., HoReCa, and certifiers) in six EU countries (DE, NL CH, HU, ES, EL), one EU region in Belgium (Ghent), and at the EU level. The focus groups represented the views of rural and urban consumers in DE, HU, ES, and EL.

Consumers were generally perceived to be aware of the environmental impact of food production, although the focus groups revealed that there was much variation in the extent of their awareness. In terms of environmental implications, they tended to be concerned about reducing chemicals and pesticides in food production. They were generally aware of the struggles of local farmers/retailers, although rural inhabitants tended to be more aware of these issues. Younger people were thought to have a greater role in spreading awareness about the social and environmental implications about food production.

Consumer understanding of SFSC is tied to the concept of local food at the regional or national level. They felt that local food was natural, seasonal and environmentally friendly. They associated local food with small-scale production and the possibility of purchasing directly from the producer. Some consumers did not understand why food from small-scale and organic farming can cost more than other types of food, suggesting that there is a need to educate consumers about these issues in order to justify the often higher prices of local food.

Although consumers generally have a positive view of local food in terms of quality, health, and environmental and social impacts, they felt that buying from SFSC was not convenient nor affordable enough for it to become a regular habit. Participants felt that increasing the range of products at SFSC retail outlets and the number of point-of-sales would encourage more consumers to purchase such products. Supporting SFSC through public procurement was seen as a major challenge but an important potential solution. Some consumers were concerned about being able to trust the authenticity of local food, and expressed doubts about the food safety and regulation of SFSC. Certification and regulation of local products would help to address these concerns.

Demand for SFSC products appeared to depend on the region, product type, purchase context and consumer segment, although it was felt that making supply more accessible would increase demand. There was a greater willingness to pay more for organic/pesticide-free products for health reasons. Consumers also value supporting the local community through purchasing SFSC products and/or purchasing from local retailers. However, relatively few consumers actually purchase products on a regular basis from SFSC. The main segments are: a) people who believe in SFSC values (SFSC advocates); b) middle class families with young children and c), elderly people. Many consumers wanted to be able to find out more information about a product, whether it was through the producer, experts with specialised knowledge, or product certification.

Because consumers appear to prioritise the healthiness of food in terms of its freshness and naturalness, highlighting these aspects in local food can be effective in attracting consumers. Focusing on the social and economic benefits of SFSC products can also emphasise the added value of these products. Communication campaigns supporting SFSC should inform consumers about the processes underlying production, control and regulation in SFSC, and how these may translate into higher costs for food but also greater health, environmental and social benefits. They should also provide more accessible on-the-pack information allowing consumers to make quick purchase decisions, with the possibility of obtaining more detailed information from a linked online source. This informational perspective should be complemented by a behavioural campaign showing consumers a feasible approach to transitioning to local food, with positive reinforcement on the impact of their behaviour for the producer, their health, and the environment.

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1. Introduction

This report presents a comparative analysis of the results from the 32 expert stakeholder interviews and 8 consumer focus groups that were conducted as part of Work Package 4 for the SMARTCHAIN project. The central objective of the SMARTCHAIN project is to promote short food supply chains (SFSC). In this context, SFSC are those that consist of a minimal number of intermediaries between the producer and the consumer. The aim of Work Package 4 on food-related consumer behaviours is to investigate which factors underlie consumers' choices and purchase decisions across different types of food supply chains, focusing predominantly on SFSC. As part of the work package, two qualitative studies were conducted to examine these issues: 1) a series of 32 interviews with expert stakeholders in Europe representing the perspectives of consumers, producers, policy makers/policy analysts, and other actors in SFSC such as regulatory authorities and HoReCa, and 2) 8 focus groups with rural vs. urban consumers in four EU countries.

This report is not an exhaustive summary of the findings from the qualitative studies, as these are covered in Deliverables *4.1 Report on the Consumer Focus Groups and 4.2 Report on the Stakeholder Interviews*. But rather, it capitalises on the convergent approach of these two studies to identify commonalities and explain why there may be discrepancies in the results. The results of these studies will feed into the subsequent Work Package 4 tasks of:

a) the consumer online study, whose aims are to examine consumer perceptions, preferences, and behavior related to SFSC, and

b) the business and policy recommendations of Work Package 7, which aim at improving the competitiveness and sustainability of SFSC.

2. Results and discussion

This section first describes consumer understanding of the context in which SFSC are situated, in terms of the broader environmental and the social impact of food production. It then details how consumers view SFSC and their products, followed by their concerns. This is followed by a discussion of consumer demand for SFSC products, what attributes consumers value about such products. A section on consumer profiles then details which segments of consumers are more or less likely to purchase products from SFSC, and the main purchasing patterns in relation to local food that emerged from the studies. Finally, we develop strategies for targeting consumers via communication and marketing methods in order to increase their engagement with SFSC and purchases of SFSC products. Furthermore, a table of problems and solutions derived from the studies can be found in Section 4.3 of the Appendix.

2.1 How aware are consumers of the impact of food production?

2.1.1 Environmental impact

Expert stakeholders had varied opinions on how aware consumers are about environmental issues related to food production. It was felt that awareness was at the level of whole chain issues, such as single-use plastics and carbon dioxide emissions. Consistent with this, some focus group participants in all the countries except for Hungary mentioned that they tried to avoid plastic packaging by shopping at local stores where they could bring their own food containers, and favouring environmentally friendly packaging. Carbon dioxide emissions were referred to in terms of food transport distances in the German focus group, where it was pointed out that driving long distances to purchase from SFSC would defeat the point of SFSC being more environmentally sustainable. This participant also suggested that it would make more sense from an environmental point of view for there to be few trips between the producer and the consumer, but with large quantities each time – such as in a truck. This point is consistent with research suggesting that the distance travelled by consumers to purchase products from producers contributes to much of the food miles and carbon footprint impact of SFSC.[1]

Some stakeholders perceived that consumers in north-western European countries generally have a greater understanding of environmental issues than those in southern Europe, and that organic food is increasingly popular in these countries. Although organic food was widely discussed across the focus groups except for those in Spain, it was clear that there is much more public awareness about organic certification standards in Germany than in Hungary. Participants in Germany discussed how organic production has a greater health impact for some food than for others (e.g., for fruits and vegetables that will be consumed unpeeled). They also debated about how organic standards are (too) many and varied, and complained about the lack of transparency associated with such standards. Participants in Germany also related organic production to improved animal welfare standards.

In the Hungarian and Greek focus groups it was mentioned that children are particularly vulnerable to the effects of pesticides. Participants in the Greek focus groups were strong advocates of organic food, recruited as they were from the networks of producer cooperatives, and discussed how they trusted organic labels, particularly local organic labels. By contrast, the issue of organic certification was not raised in the Hungarian focus groups, although the participants did discuss how it was not uncommon for conventional food to be passed off as organic food in markets. Some participants in Hungary also did not understand why organic food should be more expensive than non-organic food. Stakeholders in Greece and Italy considered that when consumers do have concerns about the environmental impact of food production, they are often linked to anxiety over negative health implications. In general, this concern was expressed by focus group participants across all the countries, as when they discussed the implications of organic food, it was often in terms of avoiding the consumption of pesticides. Consistent with this, more general research suggests that organic food purchases are driven more by health than environmental values.[2]

Although Spain is one of the larger producers of organic food in terms of land mass of all the focus group countries (sharing the leading spot with Greece)[3], Spanish participants only explicitly mentioned organic food once during the discussions. Instead, more emphasis was put on traditional, small-scale production methods. Traditional production is associated with the reduced use of chemical fertilisers and pesticides compared to modern, large-scale farming. As such, it is possible that when Spanish participants discussed their support for traditional, small-scale production methods, they were expressing the same concern for reduced chemical contamination that those who talk about organic food in the other focus groups do. Similarly, to the extent that traditional production is associated with a lower environmental impact than large-scale intensive farming, those who favour traditional production methods may also do so for environmental reasons. These similarities between organic farming and traditional farming methods may explain the observation from stakeholders that consumers often confuse local food with organic food. That is, because local food is associated with traditional farming methods (at least in the Hungarian and Spanish focus groups), local food may be seen as "more organic" than food from longer supply chains. However, some participants drew a clear distinction between local products and production method. For example, one German participant pointed out that "organic products can also have long supply chains, and the label does not give any information about it." Another felt that the regionality of products was more important than whether they were organic or not, because they wished to support regional producers. In a similar vein, a Spanish participant remarked "For me, it does not depend where a product is produced, but how it is produced. Production quality for me is what matters."

[1] Malak-Rawlikowska A. et al., (2019). *Quantitative assessment of economic, social and environmental sustainability of short food supply chains and impact on rural territories.* Retrieved 1/12/2019. https://www.strength2food.eu/2019/02/28/quantitative-assessment-of-economic-social-and-environmental-sustainability-of-short-food-supply-chains-and-impact-on-rural-territories/
[2] Mondelaers, K., W. Verbeke G. Van Huylenbroeck (2009), Importance of health and environment as quality traits in the buying decision of organic products, *British Food Journal*, 10, 1120-1139.
[3] Eurostat. https://ec.europa.eu/eurostat/statistics-explained/index.php/Organic_farming_statistics. Accessed 20/02/2020

Consumers in southern countries such as Italy, Spain and Greece were perceived by stakeholders to be more concerned about whether products are seasonal, locally-produced and specific to their geographical area, than they are about greater environmental and social issues related to food production. The focus groups revealed that participants in Germany, Spain and Greece valued seasonality when shopping for food, whereas those in Hungary did not mention this aspect. In all countries some participants also expressed a preference for products that were regional/national. The reasons given for this were related to wanting to support the local economy, and trust in the quality of local products. However, it is interesting to note that although some participants in urban Hungary preferred Hungarian products, there were also those that felt that their national products were of a worse quality than foreign products. Some participants in Spain and Germany also mentioned purchasing regional specialties from SFSC. In Spain this included olive oil, honey and wine. In Germany this included apples from Lake Constance, Swabian Maultaschen (a type of large meat and spinach-filled ravioli), which is a specialty of Baden-Württemberg, and Alb lentils originating from the Swabian Alb region.

2.1.2 Social impact

Some stakeholders also perceived that consumers in north-western European countries had a greater understanding of social issues than those in southern Europe, and that fair trade was more popular amongst consumers in north-western Europe than in other European regions. Although fair trade was only mentioned (briefly) in a German focus group, many participants across Greece, Spain, rural Germany and rural Hungary discussed the social implications about food production in terms of the financial hardships faced by local farmers and retailers. In particular, those in urban Greece preferred to purchase from small-scale and local producers because their agricultural and labour practices can be checked by consumers themselves and are less likely to involve any kind of exploitation. Similarly, in urban Spain it was mentioned that “The large chain promotes the fast production, and the owners of the farmers sometimes employ people for very low money, which leads to the decrease of the product values, at the expenses of the workers.” Thus, it appears that the story of the struggling farmer resonates with some consumers. Consistent with this, previous research examining the views of consumers in Germany, Spain, France, Poland and the UK suggests that consumers view small-scale producers as being hard-working, underpaid, and under pressure.[4] However, it appears from the focus groups that, to some extent, urban consumers are less aware of the hardships of local producers than those of rural inhabitants. Consistent with this, one stakeholder from an urban region in Flanders recounted how when a documentary about the financial struggles of local farmers was shown on local public television, “People were shocked. [There was] lots of public debate on the radio and talk shows afterwards about how it is possible that farmers around the corner produce and have to sell below market price.”

2.1.3 Role of younger people

Stakeholders felt that there is a growing awareness amongst children and young adults regarding environmental issues and how it affects food production. This view was shared by some in the Greek rural focus group who felt that the younger generation are more sensitive to these issues. This may be because environmental awareness courses are taught in Greek schools as part of the standard school curriculum and it has boosted awareness about food production and related health issues.[5] However, some in the urban Greek focus group felt that the younger generation were indifferent to these issues, and that although they may attend events related to environmental awareness, they are not really engaged with these issues. Part of this supposed discrepancy may be because younger people exhibit some types of engagement with environmental issues, but not others. For example, one EU-level stakeholder made the distinction between consumers and citizens, explaining that “citizens are more aware of the environmental impact, but that doesn’t mean that

[4] Citizen Participation Forum focus group report from the Trust Tracker® (2018). https://www.eitfood.eu/public-engagement/projects/eit-food-trusttracker

[5] Kimionis, G. (2007). An analysis of the Effectiveness of Environmental Education Centres: The views of local coordinators for environmental education. *Higher Education and the Challenge of Sustainability: Problems, Promises and Good Practice*, *5*, 89.

they are paying for it… in the way that we've got 16 year olds marching along Rue de la Arts-Loi[6] – those are citizens, they are not consumers, they're not paying for food, but they want to change the world." – those are citizens, they are not consumers, they're not paying for food, but they want to change the world." Similarly, consumer research into the Fairtrade brand in the UK identified a target audience segment of a younger group of consumers who are socially and environmentally aware.[7] Although these younger people spend less on Fairtrade products than the older and middle-class target group, they are more likely to spread their beliefs, and thus serve as more effective brand ambassadors than the consumers who actually purchase Fairtrade products. As the EU-level stakeholder remarked, "So sometimes at an institutional level, the drive for change is about what kind of production and market citizens want to see, rather than the ones that are currently paying for it by going out and spending their money." rather than the ones that are currently paying for it by going out and spending their money." This suggests that although awareness may not drive purchase behaviour directly, different types of citizen engagement are needed to support local food.

Summary of key findings about consumer awareness of the impact of food production

- Consumers across different countries care about similar environmental and social issues related to the impact of food production, although they are sometimes expressed in different terms across countries.
- Consumers in DE, ES, and EL valued seasonal food.
- Consumers across countries generally preferred food produced in their region/country.
- In terms of environmental issues, they are mainly concerned about reducing chemicals and pesticides in food production, primarily in terms of their health implications, but also in terms of environmental implications. Those in DE, EL, HU discussed this in terms of organic food, whereas those in Spain may discuss this in terms of small-scale traditional production.
- Consumers across countries were generally aware of the struggles of local farmers/retailers, although rural inhabitants tended to be more aware of these issues.
- Younger people were perceived to be more aware of the environmental and social issues of food production. Compared to older people who hold similar values, they are more likely to spread their ideas and agitate for change rather than to purchase more sustainable products.

2.2 Consumer perceptions of short food supply chains and their products

Expert stakeholders felt that consumer understanding of SFSC is mainly in terms of local food, rather than the number of intermediaries in the food chain. In the focus groups, local food was often presented in opposition to the food that is sold through supermarkets, with participants in urban Spain initially believing that it was not possible to find local food in supermarkets, "In my point of view the products of the short chain cannot be at the supermarket, because the modus operandis is different. For supermarkets and hypermarkets, it is required to collect the fresh foods, still in an immature state, which leads to a lack of taste and flavour. When you are going to a small producer, because they pick their products daily, you will find the products of the day, in incredible condition." Although there is no standard understanding among consumers of what local food is, stakeholders felt that the image they have is generally centred on: a) the origin of the product, and b) buying directly from the producer, which supports the transparency of the supply chain and the authenticity of the food (e.g., in terms of it not undergoing artificial processes).

[6] A popular street for social and political protests in Brussels

[7] Creating brands with purpose – the mainstreaming of Fairtrade. (2013). https://www.marketingsociety.com/sites/default/files/thelibrary/Fairtrade%20-%20Creating%20brands%20with%20purpose.pdf. Accessed 18/02/2020

Across the interviews and focus groups we see that consumers conceive of local food in terms of regional or national borders, rather than in terms of geographical distance. However, there were also some participants who proposed that reducing food miles should be the critical criteria for food choice, with one participant from rural Greece commenting “The ideal is always to consume in your environment. That is, everything that grows within a radius of 5-10 kilometres from where you are is the ideal.” There may be several, non-mutually exclusive reasons why consumers tend to think about local food in terms of borders rather than distances. They may do so because their understanding and affiliation with their food system may be based on their level of social identity, for example in terms of supporting their regional/national economy. Alternatively, consumers may adopt this categorisation because information about a product’s provenance is generally indicated in terms of its country/region of origin, rather than in terms of food miles, and thus this level of representation may be more salient to consumers. One potential implication of this is that if information about food miles was made as salient as information about food origin, consumers’ purchase decisions may be more influenced by food miles. For example, when participants in the focus groups were asked how far they would travel to purchase local food, those in Germany and urban Hungary (i.e. Budapest) stated that the distance would be no farther than their local (super)market, or no further than the distance between their workplace and home. However, those in rural Hungary were willing to travel between 20-30km for local food, which coincidentally is not far from the 40km legal limit for SFSC distances outside of Budapest in Hungary.

Stakeholders also considered that in Hungary, Switzerland, and Greece the consumer idea of local food implies food that can be directly purchased from the producer (e.g. market or agricultural community), thus benefiting the producer directly. This perception was also reflected in the focus groups of Greece, rural Spain and Germany, with those in rural Spain and Greece further associating this characteristic with transparency about a product’s origin and production method.

There was a strong consensus from stakeholders that consumers generally perceive local food in a very positive light, which was consistent with the results of the focus group discussions. However, it was sometimes felt that consumers are confused about what exactly is good about local products. For example, they are unaware that local production does not necessarily mean that the product is more natural or environmentally friendly. Some stakeholders pointed out that some supermarkets advertise local food for products that are industrially produced, and that some local foods do not use organic production methods. From the focus groups, it appears that consumer conceptions of how SFSC are ‘more natural’ falls along a wide continuum, from a product being more natural because it is not artificially ripened with chemicals such as those from longer supply chains, to a product being produced using traditional methods, as well as a product not being contaminated by roadside pollution or pesticide spray from neighbouring fields.

What some participants were confused about, particularly in the rural Spanish and Hungarian groups, is why organic or local food should cost more. They perceived that small-scale production was less resource intensive and felt that this should actually reduce costs. Similarly, they also wonder why organic products tend to me more expensive than non-organic products. Their reasoning is that since organic farmers do not have to pay for pesticides and chemical fertilisers, then their products should not cost more. However, others understood that local products may be more expensive due to a lower volume of production and/or a slower rate of production compared to longer chains. For example, many participants in rural Spain felt that larger producers apply fertilisers and pesticides to increase production rates and volumes, thereby reducing production costs relative to the volume produced in a set amount of time, whereas traditional production methods take more time for a smaller yield. Nevertheless, there appears to be a need to communicate to consumers about why small-scale and organic farming may increase the cost of food production, in order to justify the cost of such food.

Summary of key findings about consumer perceptions of SFSC

- Consumer understanding of SFSC:
  - is tied to the concept of local food,
  - focuses on the origin of the food in terms of regional or national borders,
  - includes the ability to purchase food directly from the producer
  - is often associated with small-scale production.
- Consumers perceive SFSC products:
  - as being more natural and environmentally friendly,
  - to be primarily positive, but sometimes confuse them with associated concepts (e.g., organic food).
- There is a need to educate some consumers about why small-scale and organic farming may increase the cost of food production.

2.3 Consumer concerns related to short food supply chains

2.3.1 Shopping preferences

The stakeholders considered that the way consumers perceive local food and/or SFSC is greatly influenced by the mainstream alternative of shopping at supermarkets. It was felt that when purchasing local food, consumers would like to have the same type of experience as offered in supermarkets, such as clean stalls with fruits and vegetables neatly arranged, having SFSC products to be available all year round rather than being less predictable in their supply, and being able to access a larger range of produce than that which is produced by SFSC. However, what participants from the focus groups most valued about the “supermarket shopping experience” was the convenience, which was mostly in terms of being able to save time. This included the fact that supermarkets are often proximal to where participants live, allow them to buy all or most of their household needs in one place, have convenient (i.e., long) opening hours, have easy parking, and offer delivery. In many cases where participants did shop elsewhere (e.g., at markets or smaller local stores), they often did so because these places were proximal to where participants live, thus fulfilling the convenience criteria. Many participants explained that a major obstacle to buying local food is the inconvenience of sourcing food from individual producers, particularly if it involved travelling further to visit individual farms. As such, they favoured the option of purchasing local food at supermarkets, (farmers’) markets, farm shops, or cooperatives, rather than visiting individual farms. It was worth noting that across all focus groups participants considered that they would only purchase local food if it was convenient for them to do so.

There was only minimal discussion from participants about wanting products to be available all year round, as those in Germany, Greece, and Spain valued seasonal products. However, given that what is seasonally available is subject to regional differences, it may also be that preferences and values regarding seasonality and availability is also subject to regional differences (e.g., consumers in Scandinavia may find local, seasonal food to be more monotonous than those living in the Mediterranean).

It was also felt that consumers expected that SFSC products should have some similar characteristics as those from longer chains – such as a large size or flawless appearance – although this expectation is gradually becoming more realistic as consumer knowledge and experience with organic and local food increases. Consistent with this, although participants in the Hungarian group judged food quality by the flawless appearance of a product, participants from groups that discussed organic production in greater detail, such as those in Greece and Germany, explicitly said that they did not evaluate food quality based on appearance.

2.3.2 Price

Perhaps the most influential point of comparison between products from long and short food supply chains is price. Stakeholders in Hungary, Spain and Greece felt that most consumers do not want to pay more to buy from SFSC than to buy from the supermarket. Participants in Hungary and Spain felt that this was the case only because many consumers cannot afford to spend more money on food. As one Hungarian participant said, “a product or business can be sustainable if it provides quality, good value for money and it is cheap. I think we Hungarians are very price sensitive because we should economise from 1000 euros instead of from 3000 euros per month. So if somebody wants to conquer markets, introduce new products, it must be known that people are price sensitive. They shall not expect that people pay more for products of quality…”. Similarly, one Spanish participant mentioned that they themselves would only buy a more expensive product from a SFSC (compared to a cheaper one from a longer chain) if they had the financial means to do so. In Greece, while the participants were strong advocates of local food, they acknowledged that they sacrificed quantity for quality in order to be able to purchase organic food. In Germany, at least one participant claimed that they would prefer to pay the real price of food, which is presumably one that takes into account the environmental costs of food production.[8] However, several others countered that this option is not affordable for all consumers. The differences in attitudes towards the cost of food may be influenced by the fact that consumers in Hungary spend considerably more of their household expenditure on food and non-alcoholic beverages (18.1%) of their household expenditure on food do those in Germany (10.8%); in Spain it is 12.3%, and for Greece it is 16.9%.[9]

It should be noted that a minority of participants did not consider local food to be necessarily more expensive. In the rural Spanish focus group it was argued that, “the large chain promotes a lot this thinking, that natural products are more expensive. But if you go directly to the farmer it is not like that. Instead if consumers go to a special retailer to buy fresh natural foods, if they go to a market, the prices are lower. But if you buy this kind of products – from short chain – inside of large chain, they increase the value.” Some participants even contended that natural, fresh products can cost more if they are bought at the supermarket, compared to if they are sourced directly from the farmer, from local stores in rural areas, from retailers specialising in fresh natural foods or from markets.

2.3.3 Fraud

Stakeholders generally felt that consumers have a positive opinion of local products in terms of quality and production standards, which is consistent with the findings of the focus groups. However, the issue of fraud in the food supply chain more generally was felt by stakeholders to be a particular concern of consumers in Hungary, Greece, and Spain (and to a lesser extent, Germany and the Netherlands), where it seems that products from longer supply chains are sometimes sold as local products, and there is no certification system and monitoring to safeguard consumers against such deceptive practices. In the focus groups, participants in Hungary raised the issue of food fraud with respect to information about origin and organic production most consistently, and claimed that they were willing to pay more for products that were controlled. Those in Germany only briefly touched upon the issue of food fraud, while participants in rural Spain trusted the integrity of small producers/retailers more than large retailers "...the producers or local commerce, they must contact directly with us, so, they have to be sincere, they have to be responsible. But I do not need directly to know

[8] https://sustainablefoodtrust.org/articles/hidden-cost-uk-food/. Retrieved 07/11/2019

[9] Eurostat (2017). http://appsso.eurostat.ec.europa.eu/nui/show.do?query=BOOKMARK_DS-423035_QID_674B0D1C_UID_-3F171EB0&layout=COICOP,L,X,0;GEO,L,Y,0;UNIT,L,Z,0;TIME,C,Z,1;INDICATORS,C,Z,2;&zSelection=DS-423035INDICATORS,OBS_FLAG;DS-423035UNIT,PC_TOT;DS-423035TIME,2017;&rankName1=UNIT_1_2_-1_2&rankName2=INDICATORS_1_2_-1_2&rankName3=TIME_1_0_1_0&rankName4=COICOP_1_2_0_0&rankName5=GEO_1_2_0_1&rStp=&cStp=&rDCh=&cDCh=&rDM=true&cDM=true&footnes=false&empty=false&wai=false&time_mode=ROLLING&time_most_recent=false&lang=EN&cfo=%23%23%23%2C%23%23%23.%23%23%23. The figures refer to 2018 for DE, ES, HU, and 2017 for EL.

how they produced the foods." By contrast, participants in Hungary seemed to place greater trust with the origin labels of products at the supermarket than at the market, perhaps because it was felt that they were more difficult to tamper with at supermarkets.

2.3.4 Food safety and hygiene

Another concern that consumers were thought to have regarding SFSC was about food safety and hygiene. This was also reflected in the responses of some participants in Spain, Germany, and Hungary, who felt less confident about the safety of SFSC products than those from longer chains. In urban Spain, a participant wondered whether SFSC producers are regulated, whereas another admitted that "Buying directly from the farmer, gives a little bit of doubt, because it is difficult to control the quality, and there are some health dangers associated with lack of control." These suspicions tended to be highlighted more for high-risk food products, such as meat and dairy. As one participant in Germany remarked, "It is not transparent at the farmer's store which hygiene rules have been observed, as the control standards are different. The risk is much higher, especially for milk."

A potential solution to the problem of fraud and lack of transparency regarding food safety standards is to have a certified quality label/scheme for local food that is also transparent about food safety standards. Although some countries have a multitude of regional labels, having one unified scheme (such as for the EU organic label) would help to reduce consumer confusion about the different schemes that exist, and help consumers to identify local food more easily, which has been reported as a particular problem for consumers.[10] However, it was pointed out by a stakeholder that currently SFSC in Spain are not prepared to show that they comply with the food safety standards demanded by HoReCa – either through lack of certification, or through ignorance of the relevant standards. Thus, educating SFSC producers about food safety regulations and making it easier for them to be certified may help them to increase their market. Examples of initiatives with these aims include the European Commission's Better Training for Safer Food (BTSF) initiative[11] and study tours organised by the Podlaskie Regional Authorities and National Rural Networks.[12]

Summary of key findings about consumer concerns related to SFSC

- Consumers felt that buying from SFSC was not convenient enough for them to perform on a regular basis.
- Local food was considered to be unaffordable for many consumer segments.
- Some consumers were concerned about whether they could trust the authenticity of local food. Those in Hungary expressed the least confidence, while those in Spain trusted small producers/retailers more than large retailers.
- Consumers were less confident about the safety of SFSC products than those from longer chains, as they felt that the hygiene rules are less transparent and the processes are less controlled. As such, some consumers felt that it was riskier to buy products from SFSC.
- Consumer trust in SFSC may be strengthened by providing producers with training about food safety regulations and facilitating certification for local food.

2.4 Consumer demand for SFSC products

Stakeholders across countries generally agreed that the demand for products from SFSC is much less than that of the mainstream offer, being somewhat a niche market. They also agreed that demand is increasing, although there was some variability in perceptions of whether consumer demand for SFSC products exceeds supply. Many stakeholders claim that demand is greater than the existing supply (Germany, Spain, Switzerland,

[10] European Commission (2013). Report from the Commission to the European Parliament and the Council on the case for a local farming and direct sales labelling scheme, https://op.europa.eu/en/publication-detail/-/publication/be106719-60e5-11e3-ab0f-01aa75ed71a1
[11] https://ec.europa.eu/food/safety/btsf_en
[12] https://enrd.ec.europa.eu/projects-practice/exchanging-experiences-food-hygiene-and-safety-small-scale-food-processing_en

Hungary), although this is sometimes specific to a region or to a type of product. For example, some producer stakeholders in Hungary mentioned that the demand for local food is greater in Budapest than in rural areas, and one mentioned that there is not enough local meat supplied.

In the focus groups participants did not express that there was insufficient supply of local food. However, they did remark that, although they would like to purchase local food, it was difficult to identify and source, and that local food should be made more accessible in more convenient locations. Thus, some cases where consumer demand appears to exceed supply may instead reflect inadequate distribution, where local food is not easily available to the target market.

In a similar vein, several stakeholders pointed out that the more available and accessible SFSC products are, the more consumers will buy such products. Stakeholders suggested that more points of sale are needed to drive consumer demand, particularly in supermarkets. Indeed, participants in the focus groups stated that they would like to be able to purchase food from supermarkets, in addition to markets, farm shops, and online platforms with delivery. In Germany, participants reported purchasing local food from vending machines when stores were closed, including eggs, apples, cabbage, potatoes, milk, meat and even specialty products such as Swabian Maultaschen. There is even a website that allows consumers to locate such types of vending machines in their area (https://regiomat.de/regiomaten/) In Flanders, vending machines are the fourth most popular channel for purchasing local food (behind local markets, farms, and local shops).[13] These machines are often situated in well-frequented locations, such as central stations, and sell staples such as bread and seasonal produce such as cherries. These machines illustrate the principle raised by stakeholders that many consumers do not buy local food because they have the idea of seeking out local food, but rather, they are simply responding to the available offer.

There was also a strong consensus from the focus groups for local food to be supported through public procurement. This issue was also highlighted by a policy expert stakeholder to be the biggest challenge concerning local food, because it represents a huge market that is very difficult for SFSC to access. Participants and stakeholders and felt that governments should create initiatives to supply schools with local/organic food, and to have them prepare meals on-site with such ingredients, as many schools currently outsource their food production. However, in order to do this, public procurement regulations would have to be more amenable to the limitations of SFSC, such as by dividing tenders in lots so that several suppliers can provide for the one institution, and enforcing a model where suppliers compete to meet a set budget rather than to provide food at the lowest cost.

Public procurement is also more likely to render local food affordable for families than HoReCa can, as public institutions generally do not aim to make a profit on food. Indeed, it was pointed out in the urban German focus group that quality food at school canteens can be reasonably priced, and cost only marginally more than non-regional food. Some stakeholders felt that to the extent that local food is perceived to be healthier and of better quality (particularly organic), parents who have the financial means would also be willing to spend more to have their children eat healthier, local food at school. Although participants in the focus groups were sensitive to the idea that children are particularly vulnerable to pesticides in non-organic food, it was felt that

[13] Coart, Johan. Short chain unleashes opportunities [Korte keten ontketent opportuniteiten]; https://www.farmcafe.be/artikel/12872, retrieved 1/10/2019

families with children have less money to spare for food than childless households, and thus may not buy as much organic food as they would prefer.

3.4 Summary of key findings about consumer demand for SFSC products

- SFSC products is a niche market. Demand is variable and depends on region, product type, and purchase context.
- Consumer demand is driven by market offer.
- Some cases where demand exceeds supply may reflect inadequate distribution, where local food is not easily available to the target market.
- Increasing accessibility would increase sales: e.g. distributing local food at supermarkets, markets, farm shops, online platforms with delivery, and centrally located vending machines.
- There is a strong demand for local food to be provided through public procurement, particularly at schools, which would make it more affordable for families with children.

2.5 Willingness to pay for SFSC product attributes

Stakeholders across countries emphasised that much of the attraction of SFSC products is that they offer something different from the mainstream offer. As such, consumers were perceived to be more interested in products such as regional specialties (e.g., asparagus from Valais in Switzerland), and quality “gourmet” products (e.g., wine, preserves), rather than ordinary products such as milk and carrots. However, the following discussion describes how there are other ways that more common products sold through SFSC can be differentiated from mainstream products.

Organic or pesticide-free products were considered to be particularly valued by consumers, which was also supported by the results of the focus groups, although participants in Spain tended to refer to ‘sustainable’ rather than ‘organic’ products. When participants did talk about organic food, they referred more to fruits, vegetables, and eggs than to meat. Participants tended to discuss the health implications of organic food more than to the environmental implications, such as for which types of products it is more critical to avoid ingesting pesticides, and the fact that children are more vulnerable to chemicals.

Supporting the local community was cited by both stakeholders and participants as an important motivation for purchasing from local producers and/retailers. This applies not only to purchasing directly from producers, but also from intermediaries such as local butchers or grocers. As one EU-level stakeholder noted, “it’s about the sentiment, the emotion, about helping someone locally rather than giving money to something that has come 14 steps in the supply chain.” As one participant in rural Germany explained, “If you only buy online or in the supermarket, the number of small producers decreases: butchers, bakers etc. die out, rural farms die out, because there are not enough buyers nearby…”. Stakeholders suggested that consumers would pay more if they knew that the farmer’s livelihood was improved through SFSC, as this benefit is particularly appealing to consumers, but it appears to be less well advertised. One suggestion was that information could be communicated by making explicit the percentage of profit that goes to the producer and intermediaries on a product’s pricing information. One proposed that legislation “should promote/establish a minimum value that is paid to the producers/local farmers. As well as establishing a minimum value of such products in accessible local stores.”

Stakeholders felt that what consumers valued about SFSC is that there is a direct relationship with the producer. This was thought to provide an avenue for transparency in the food chain, as it allows consumers to ask questions about the products, and to feel that they can trust the products through knowing the producer. While some participants did value personal relationships, these were not necessarily specific to the producer, but extended to anyone who had specialised knowledge of the product, such as local store owners or retail staff. Moreover, participants felt that there were other ways of finding out the information they needed, such as through certification of the products' attributes. Although, it is worth noting from the focus groups that this certification needs to have transparent standards and to be conducted by a neutral authority in order to be trusted. This result is consistent with other research showing that consumers tend to trust third party certification more than product claims, but only if it comes from a trusted certifier.[14]

Although buying from SFSC allows consumers to fulfil their value of supporting farmers and their local community, stakeholders felt that local products need additional selling points such as their quality to appeal to consumers. It was also pointed out that the attributes that consumers are willing to pay more for in SFSC products are those that apply to products from longer supply chains as well, such as the product having health benefits, or a special/traditional taste. Participants in the focus groups did not generally speak about products having a special/traditional taste, perhaps because those who more regularly purchased local food bought unprocessed foods such as fruits and vegetables, which may not be associated with a specialised taste as much as more processed products are. They did not generally discuss the criteria they used to purchase processed foods, except to say that they valued expert advice for such purchase decisions (e.g., for wine). This may have been the case because participants were more likely to purchase fresh and "minimally" processed food (e.g. honey, olive oil) from SFSC.

Participants across the focus groups did express strong concerns about health, which was often spoken in terms of avoiding the consumption of pesticides in relation to organic food (in Germany, Greece, and Hungary), and more natural, less processed food (in Spain). However, many participants weighed their willingness to pay for health benefits against the affordability of healthy food. As one participant in rural Spain explained, "Nowadays, the healthier and natural products are more expensive than processed and less healthy ones. Therefore, the natural foods that are more expensive may not be accessible for everyone." Thus, as many stakeholders noted, focusing on consumers' willingness to pay for certain attributes is more relevant for middle-class consumers.

Another selling point of local products that is often targeted at middle-class consumers is in the context of agritourism, where local products become another way for travelers to experience a local culture. It was acknowledged among Greece stakeholders that demand for local products is increasing in the agritourist sector, particularly among more affluent tourists. Related to this, in the urban German focus group some mentioned that they only purchased local food while on holiday, but not in their everyday life. This suggests

3.4 Summary of key findings about willingness to pay for SFSC attributes

- Because SFSC products generally cost more than the mainstream offer, the demand for SFSC products is dependent on market differentiation.
- Consumes are willing to pay more for organic/pesticide-free products (e.g., fruits, vegetables, and eggs) for health reasons.
- Consumers also value supporting the local community through purchasing SFSC products and/or purchasing from local retailers.
- Many wanted to be able to find out more information about a product, whether it was through the producer, experts with specialised knowledge, or product certification.
- Although many participants were concerned about the healthiness and naturalness of products, it was felt that many consumers could not afford to pay more for such attributes.
- Middle-class consumers were also thought to be more willing to buy local food when travelling.

[14] Tonkin, E., Meyer, S. B., Coveney, J., Webb, T., & Wilson, A. M. (2016). The process of making trust related judgements through interaction with food labelling. *Food Policy*, *63*, 1-11.

that different motivations to purchase local food may be activated in different contexts. Furthermore, since people have fewer opportunities to purchase local food while travelling than they do in their day-to-day life, they may be more willing to pay for the less frequent travel expense of purchasing local food, than the more frequent expense of purchasing local food for grocery shopping.

2.6 Consumer profiles

The primary motivations for purchasing local food raised by the expert stakeholders were environmental and health concerns, a preference for tradition, and wanting to support the local community. These concerns mapped onto the following consumer segments that were identified from the interviews and the literature:

a) SFSC advocates ("Locavores"). These consist of a relatively small percentage of consumers who support local food because: a) they believe that that local foods are superior in taste and quality, b) they are opposed to long food supply chains, and c) they believing in building and supporting one's own community or local communities more generally.[15] In the focus groups, the Greek participants can be considered to strongly reflect these motivations, overlaid by a particular concern for organic food in terms of its health and environmental benefits. Although participants across the other focus groups tended to share the belief that local foods are superior in taste and quality, and many also believed in building and supporting one's own community, very few were opposed to long food supply chains. This may be because most participants shopped from long supply chains for the sake of convenience, and generally had more confidence in the hygiene and safety standards of such chains compared to the smaller chains.

b) Middle class families with young children. The consumer segment of (middle-class) families with children was mentioned as being particularly interested in local food by some expert stakeholders. This group may be interested in SFSC because visiting producers onsite can offer attractive/educational experiences to their children. For example, in Switzerland, it was noted that families often take their children to local markets and farms where the public can pick their own produce – in this way children from the city can experience how food is produced in the field. Another common explanation given for the interest of families with children in SFSC was that they preferred to feed their children with food from such sources because of young children's particular vulnerability to chemicals. Although participants in the focus groups felt that it was important for children to be educated about food production through visiting farms (particularly urban children), it was also discussed that frequent visits to farms could not occur regularly because such visits required advanced planning and only allowed a very limited range of produce to be purchased.

Some stakeholders and participants also pointed out other impediments that prevented families with children from purchasing local food, such as having less disposable income, and having less time to source local food for the whole family's needs. As one stakeholder from Spain explained "Due to the economic crisis, families with lower-middle income give more importance to the price in the shopping list." Thus, we see that although families may be motivated to provide healthier food for their children, it tends to be those of a higher SES who have the financial means to do so.[16] In terms of families with children having less time available to purchase local food, it is interesting to note that the stakeholders who mentioned families as being a target market for local food were from regions where there is a relatively greater density of local food retailers (e.g., Flanders and Switzerland). Thus, in order for this group to be considered as a target market for local food with any meaningful degree of regularity, the food must be relatively affordable and accessible to them. This is perhaps why facilitating the public procurement of local food in schools was proposed as a solution by so many stakeholders and participants alike.

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[15] Reich, B. J., Beck, J. T., & Price, J. (2018). Food as ideology: Measurement and Validation of Locavorism. *Journal of Consumer Research*, *45(4)*, 849-868.

[16] Dimitri, C., & Dettmann, R. L. (2012). Organic food consumers: what do we really know about them? British Food Journal, 114(8), 1157–1183.

Paul, J., & Rana, J. (2012). Consumer behavior and purchase intention for organic food. Journal of Consumer Marketing, 29(6), 412–422.

c) The elderly. Some stakeholders mentioned the elderly as a consumer group that was particularly interested in local food. In the focus groups however, the elderly were only mentioned as a particular segment of retailers (in the markets of Budapest), but not as consumers. Elderly people were thought by stakeholders to purchase from SFSC because they have the tradition of buying directly from the producer, and they have more time to visit multiple producers to source the range of products they require, and the time to prepare meals from locally-sourced products, as such products tend to come in the form of raw ingredients rather than ready-made meals. In Hungary, stakeholders mentioned that this segment seeks products that are traditional in taste and production methods, and that their motivation stems from a sentimentalism about local products.

Consumers who do not buy local products. The results of the stakeholder interviews and focus groups indicate that most consumers do not regularly buy products from SFSC. Some may not do so because they are unaware of the benefits of SFSC products, perhaps due to lack of available information, and/or lack of interest in the issues related to SFSC. Indeed, many participants from the focus groups felt that more consumers would purchase SFSC products if they were aware of the benefits of SFSC and their products. Nevertheless, the results of the focus groups suggest that those who do not buy regularly from SFSC are aware of at least some of the benefits of SFSC, and they often would like to buy more healthy/sustainable food. However, many participants across the groups admitted that they would only purchase from SFSC if it was convenient and affordable for them to do so, with the implication being that local food currently did not fulfill these criteria. This suggests that education about the benefits of SFSC and price reductions of SFSC products can only have a limited effect on consumer behaviour if the convenience of buying and using SFSC products is not improved.

2.6.1 Purchasing patterns

A comparison of the stakeholder interviews and focus group discussions suggests that there are two distinct purchasing patterns associated with purchasing SFSC products depending on product type. One pattern is that of purchasing mainly fresh produce such as fruits, vegetables, eggs and meat that are locally sourced. The other pattern involves purchasing more regional specialities, which may include seasonal fresh produce (such as asparagus from Valais or apples from Lake Constance), or more processed products such as preserved meat, cheese, preserves, and olive oil. The first category of foods tends to be purchased more regularly by consumers who are *locavores* and those who have health concerns and the financial means to satisfy this concern (e.g. middle-class families with young children).

Convenience and price are likely to play a greater role in the purchase of the first category than the second category of foods because of their more frequent consumption. As such, producers of such products can increase their economic sustainability by being well connected to areas with a greater density of affluent consumers – e.g., urban areas. For example, the municipality of Ghent allows farmers to access local agricultural land for free, under the condition that they have to produce for the local market. For producers who are located further away from urban areas, another way of gaining access to a wider market is by selling products through urban markets, farm shops and supermarkets.

In some cities however, small producers are crowded out of urban markets by larger wholesalers who have greater volume, greater availability, and more staff. One solution from the interviews and focus groups is for producers to form cooperatives to increase their product range, availability, and presence. However, it is worth noting that the culture of cooperatives can vary between regions. For instance, Italy has a strong cooperation culture in producing the same types of crops, whereas it was suggested that in Switzerland and Greece that producers find it difficult to cooperate with each other. Local governments can also intervene to promote opportunities for small producers in urban markets. For example, the municipality of Ghent helps local producers to set up farmers' markets, and in Budapest only certified small producers from SFSC can retail at farmers' markets (although other types of markets are accessible to other types of producers).

In cases where small producers of fresh produce must target a rural market, insights from the focus groups suggest that they may sometimes struggle to find enough customers, despite selling their produce at a lower price compared to urban retailers. It was suggested in one of the Hungarian focus groups that in such cases community supported agriculture (CSA) initiatives or purchase groups could be formed to support regional farmers. Similarly, offering local products online with home delivery, or delivery to a local pick-up point would also increase the convenience of buying SFSC products. While delivery of local products satisfies the convenience criteria, many participants from the focus groups expressed reluctance to take up this option for fresh produce. The reasoning behind this is that home delivery prevents them from being able to select their own produce, and thus they are concerned that they may be offered inferior products. However consumer confidence on this issue could be built up by allowing consumers to gain information about service (e.g., through reviews, first-time trial offers), or allow thing greater control over product selection (e.g., allowing consumers to specify their desired best before dates for fresh products, allowing delivered products to be easily refused, returned, exchanged).

Consumers who tend to purchase only regional specialties and not local fruits, vegetables, eggs and/or meat are likely to do so based on attributes specific to the product itself, rather than the greater social, health and environmental implications of SFSC. In such cases, consumers will not purchase these products as regularly as committed consumers of local unprocessed foods, but they may be willing to pay more for individual products because the purchases are less frequent and so take up a smaller percentage of their overall grocery bill.

3.5 Summary of key findings about consumer profiles

- Consumers are motivated to purchase SFSC products mainly because:
  - they are concerned about health,
  - they are concerned about the environment,
  - they want to support the local community.
- Compared to the mainstream offer of products, SFSC products require more time, money, and effort to purchase. Thus:
  - Most consumers do not buy from SFSC even if they would like to.
  - Consumers with more time and money are more likely to purchase SFSC products.
- Relatively few consumers purchase products regularly from SFSC. The main segments identified by the stakeholders are:
  - People who believe in SFSC values (SFSC advocates)
  - Middle class families with young children (they are concerned about health, the environment, and they have financial means)
  - Elderly people (they like traditional products and have the habit/time to buy directly from producers)
- Two main purchasing patterns that consumers appear to exhibit are:
  - Purchasing a range of local fresh produce that are not regional specialities. This behaviour is likely to be based on a combination of health, environmental, and social concerns.
  - Purchasing regional specialties. This behaviour is more likely to be based on market differentiation at the level of product type (i.e., the exceptional qualities of the food product itself, compared to other food products).

2.7 Communication and marketing strategies for increasing consumer purchase of short food supply chain products

The results of the interviews and focus groups suggest that SFSC products are valued for their health, environmental, and social implications. Of these three, health-related concerns appeared to be prioritised across the focus groups, with participants valuing the freshness and naturalness of local food. Although the freshness of unprocessed food is more consistently associated with shorter than longer chains, it was also acknowledged that the level of freshness participants were concerned about can also be found in longer chains. In terms of the naturalness of local food, participants were particularly concerned about avoiding harmful chemicals, and to a lesser extent unnecessary food processing, an aim which they acknowledged could also be fulfilled by purchasing organic products (that are not necessarily local) or products that are traditionally made. Similarly, in terms of environmental implications, many participants considered that organic food reduces the impact of food production on the environment (and promotes welfare standards for some animals), although a few acknowledged that local food reduces carbon emissions in a way that organic food does not.[17] Thus although the fresh, natural and sustainable aspects of local food can be highlighted to effectively attract consumers, these benefits are not perceived to be exclusive to SFSC products, and so do not emphasise the added value of local food.

One benefit that is exclusive to local food is its social and economic implications for the local community. However, the extent to which these implications are meaningful for consumers may depend on whether they feel that their local community is in need or would benefit from such support. For example, it is interesting to note that unlike most of the focus groups, the urban German focus group (which came from the relatively affluent area of the city of Stuttgart) did not mention the social implications of local food, but they did refer to buying Fairtrade products (which embody the principles of local food in developing countries). This suggests that their concern about the social implications of food production may apply to communities that are less fortunate than their own. As alluded to earlier in the report, this may be due to the relative lack of knowledge of urbanites about their local food system. However, given that many consumers categorise local food at a national level, publicising the hardships of small-scale national farmers may be targeted enough to resonate with even urban consumers. Furthermore, communicating about local food at this level would allow promotional material to be rolled out in a nation-wide campaign.

It is perhaps no coincidence that the consumers who were perceived to be more interested in Fairtrade products by stakeholders were also perceived to have a greater understanding of social and environmental issues, and who also live in more affluent countries. Indeed, while the US Fair Trade logo is recognised by 38% of US consumers, it was found to resonate with 62% of those who reported valuing health and sustainability. The organisation subsequently switched from a strategy of trying to appeal to all consumer segments to one of targeting middle class consumers who care about these two issues. [18] The idea that only a subsection of the population will be interested in products representing locavore values is also echoed by a stakeholder who explained "Those who are open to such issues [i.e., the hardships of local farmers] are increasingly aware of it. But the general public (who are struggling with eating healthy food or struggling with what to buy) are not aware. And it shouldn't be their first concern." This suggests that a more targeted approach of promoting SFSC may be more effective in increasing consumer uptake. However, given that the present studies so far have identified country and regional differences in consumer attitude and behaviour, such approaches should also be region specific.

The results of the focus groups suggest that there are two levels at which consumers would like to receive information about SFSC and their products. On one level, they wish to know about the extent to which SFSC are regulated/controlled and which food hygiene or safety standards have been followed (particularly for higher risk products such as meat and dairy). As mentioned previously, this type of information can be

[17] Although other contextual factors besides the number of food miles also impacts the carbon footprint of food. This includes the volume of products that is transported (Malak-Rawlikowska A. et al., 2019). *Quantitative assessment of economic, social and environmental sustainability of short food supply chains and impact on rural territories.* Retrieved 1/12/2019. https://www.strength2food.eu/2019/02/28/quantitative-assessment-of-economic-social-and-environmental-sustainability-of-short-food-supply-chains-and-impact-on-rural-territories/), and how mechanised the food production process is (https://www.theguardian.com/environment/2008/mar/23/food.ethicalliving)

[18] Clifford, Catherine (2013). Lessons From Fair Trade on How to Make Your Brand Message More Powerful. https://www.entrepreneur.com/article/226660. Retrieved 18/02/2020.

communicated via certification, which may be costly for producers, and which may not represent an added value for some consumers. Additionally, it was mentioned in the focus groups that policy papers can be disseminated to the public on such issues about SFSC in general.

On another level, consumers wish to know about the production methods of particular SFSC products. Some wish to know about certain aspects in great detail (such as which organic standards have been followed), whereas others wish to be able to easily judge whether a product meets a certain criteria (e.g., is a product organic or not?). For those who wish to access detailed information at the time of purchase, QR codes can be used to communicate information about production standards, in addition to other information such as the origin of the product, nutritional information, carbon impact, etc. Alternatively, participants from the focus groups were receptive to learning about the production methods of particular producers by visiting their production facilities, or viewing videos that give a tour of the facilities and that explain the production process. It was even suggested producers could be present at farmer shops so that consumers could interact with the producer and learn about their products. Linking the implications of the production and regulation processes to the higher price of local and organic food can also help consumers to better understand the value of SFSC products.

It was also suggested in the focus group that pricing information for consumers should make explicit the percentage of profit that goes to the producer and intermediaries. Although it may not be feasible to communicate this type of information in such detail, this suggestion reflects the desire for consumers to know the extent to which their purchase benefits producers. This type of information can be communicated in other ways, such as by reporting on a comparison of the average percentage of profit producers receive through direct selling, or via supply chains with one intermediary, versus how much they receive through long supply chains, and how this is translated in terms of annual revenue. Currently consumers are simply informed that producers benefit economically more through direct selling than through longer supply chains, but being able to quantify this information to some extent would help to make such information more concrete, and potentially more persuasive for consumers.

The focus groups also revealed that although participants were generally convinced of the superior quality of local food, they perceived too many obstacles to changing their shopping habits. Although many of these obstacles may be more effectively addressed through structural and policy changes, communication campaigns targeting behaviour change may also help consumers to feel empowered to buy local food. For example, in 2010 Fairtrade UK implemented a campaign called 'The Big Swap'[19] where for two weeks consumers were called upon to swap their usual products for Fairtrade stuff, their usual bananas for Fairtrade bananas, their usual cotton socks for Fairtrade cotton socks, and their usual tea for a Fairtrade tea. The message used in the campaign "just one little swap at a time", emphasises the positive impact of small, feasible changes. This type of behaviour may help to introduce a third purchasing pattern that represents a middle road between buying most of one's fresh, unprocessed produce from SFSC, and purchasing only a few regional specialties as local food. To positively reinforce this behaviour, a similar strategy as that used by Fairtrade may be adopted where stories about the farmers that are positively impacted by local food purchases is disseminated, for example, on retailer websites, and in farm shops and producer cooperatives. In this way, consumers are inspired to feel that their behaviour is making a difference, and is thus worth continuing.

[19] Macleod, Duncan (2010) Fairtrade Big Swap. http://theinspirationroom.com/daily/2010/fairtrade-big-swap/. Retrieved 18/02/2020

3.6 Summary of key findings about communication and marketing strategies for increasing consumer purchases of SFSC products

- Because consumers appear to prioritise the healthiness of food in terms of its freshness and naturalness, highlighting these aspects can be effective in attracting consumers.
- Focusing on the social and economic benefits of SFSC products at a regional/national level can also be an effective approach, because it emphasises the added value of these products.
- Region-specific market research is needed to identify the best strategies to promoting local food. It may be more effective to focus on specific target audiences, or to have different aims for different target audiences (e.g., relying on younger consumers to spread awareness about local food, targeting sales at older, more middle class consumers).
- Communication campaigns should work on several levels:
    - Dissemination of information about SFSC in general, the processes underlying their production, control and regulation, and how these may translate into higher food prices but also greater their health, environmental and social benefits.
    - On-the-pack information allowing consumers to make quick evaluations for purchase decisions, with the possibility to obtain more detailed information (e.g. via QR codes, or visiting the producer's/product's website).
- Behavioural campaigns should make participants feel that it is feasible for them to purchase local food more regularly, and reinforce this behaviour by providing positive feedback on the impact of consumers purchasing local food.

2.8 Conclusions

Many consumers value local food not only for its health and environmental benefits, but also because of the support that it provides to their local community. However, the main barriers of price and inconvenience make it difficult for consumers to purchase local food on a wider scale. Inconvenience can be decreased by having a wider range of SFSC products in retail outlets, increasing the points of sale, and facilitating the supply of local food via adapting public procurement strategies to the limitations of SFSC. This last strategy would also increase the accessibility of local food to consumers who value but cannot afford local food (e.g., working class families with children).

Those who are concerned about supporting their local community tend also to be aware that buying local food helps local producers to stay in business. However, people in more urban areas may not be as aware of the struggles of local farmers due to farmers having a reduced presence in urban areas. Thus, the motivation to purchase local food can be increased via campaigns highlighting how consumers can help to support national farmers, with details about the degree to which farmers benefit from direct sales, and stories about the positive impact of local food purchases.

Consumer confidence could be improved on the issues of: a) the authenticity of local food, b) food safety and regulation standards of SFSC, and c), why small-scale and organic production methods result in higher food prices. Information campaigns can address doubts about these issues, and certification can reassure consumers and help to expand the market for SFSC producers.

Communication and marketing strategies should be based on market research identifying and targeting the target audience/s values, concerns and behaviour – not just in terms of purchase patterns, but also in terms of advocating for local food on a wider level. This research should be product- and region- specific in order to maximise its relevance. It should focus on: a) providing information about what consumers want to know about SFSC and their products in a usable format, and b) targeting behaviour change by making purchasing local food seem feasible to consumers.

3. Appendix

3.1 Descriptions of the stakeholder organisations interviewed

Region	Stakeholder	Stakeholder type/s represented	Description
EU	European Network for Rural Development (ENRD)	Policy	The European Network for Rural Development (ENRD) was launched in October 2008, to act as a focal point for all rural development actors across the EU. In particular, the ENRD helps ensure that Member States efficiently implement Rural Development Programmes (RDPs).
	Slow Food International	Producer, consumer, retailers, HoReCa	Slow Food is a global grassroots organisation, founded in 1989 to prevent the disappearance of local food cultures and traditions, counteract the rise of fast life and combat people's dwindling interest in the food they eat, where it comes from and how our food choices affect the world around us.
DE	Consumer Advice Center Baden-Württemberg e.V.	Consumer	The German consumer advice centres are associations organised at state level which, on the basis of a government mandate, are dedicated to consumer protection and provide advisory services.
	State Parliament of Baden-Württemberg	Policy	Interviewee is a member of the State Parliament of Baden-Württemberg, who has special expertise in rural areas.
	State Parliament of Hessen (Bündnis 90/Die Grüne party)	Policy	Member of the State Parliament of Hessen, who has a special expertise in agriculture, animal welfare and hunting. Bündnis 90/Die Grünen is a political party in Germany. The main focus is on environmental policy. The guiding principle of "green policy" is ecological, economic and social sustainability.
	Kaemena Farm	Producer, service	A dairy farm with cattle farming as the basis of the farm. In addition, the farm owner offers five holiday apartments and sells ice-cream.
	Regionalfenster (Regional window) GmbH	Certifier	Regionalfenster Service GmbH organises the testing and security system and grants licences for the regional window to companies in the agricultural and food industries. The symbol "Regional window" shows you where the product comes from (origin of the main ingredient(s), the main places of processing, etc.).
NL	Organic Farm Landzicht	Producer, consumer	Landzicht is an organic farm which sells their products to consumers via subscription. This farm is focused on cohesion/balance between earth, plants, animals and human beings. That is why they pay attention to all aspects of life on their farm.
	Philips Fruit Garden	Producer, retailer, HoReCa	Established nearly 90 years ago, the Philips Fruit Garden supplies healthy fruit from its apple, pear and plum orchard. The modern pancake house on the site, De Proeftuin, serves pancakes, while the farm shop (*Landwinkel*) sells apples and pears from the orchard, together with a wide range of artisan products from the local area.
	Sustainable Agriculture team from Province South-Holland	Policy	The Sustainable Agriculture team of the province of South-Holland is involved in the goal of the province to develop a sustainable agricultural- and food policy. The overall goal of province South-Holland is smarter, cleaner and stronger.
	Wageningen University & Research (WUR)	Policy	Interviewee is a researcher at Wageningen University with a special focus in short chains and policy advisor for province South-Holland. WUR is a collaboration of different research institutes and the university, focused on various natural, technological and social disciplines.
	Province Utrecht	Policy	Interviewee is part of team line of defense expert team. They stimulate redevelopment in different areas: restauration, nature conservation, energy, marketing etc. Province Utrecht is focused on a

			balance between nature, agriculture, water, culture history, landscape and recreation.
	Mariënwaerdt	Producer, HoReCa	Mariënwaerdt is an old family estate with a shop, in which they sell products produced at the estate, a restaurant, a fair, hotel/B&B and it is often used as a location for different events.
CH	Slow Food Switzerland	Producer, consumer, retailer	Slow Food is committed to biodiversity, advocates for sustainable food production and respects the environment and invests in taste training; quality food producers and consumers in the context of events and initiatives. Slow Food has approximately 100,000 members worldwide. Slow Food Switzerland has about 4,000 members, and the organisation is supported by a growing number of friends in the form of donations and voluntary help.
	University of Neuchâtel	Policy	The focus of the interviewee's research is the complex relationships between production, processing, trade and food consumption, and their political, economic and environmental issues.
	French Federation of Contractual Agriculture of Proximity	Producer, consumer	Since 2008, the Fédération Romande d'Agriculture Contractuelle de Proximité (FRACP) has brought together the agricultures of French-speaking Switzerland. Their missions are to strengthen short food supply chain links, sharing knowledge, supporting the new short food suppliers, and raising awareness and building the short food supply model with the public and political authorities.
HU	Csoroszlya Farm Kft.	Producer	Organic producers who sell to restaurants (fine dining) and on 4 farmers' markets (vegetable, potato)
	Chamber of Tourism	Producer	Group of producers who sell together in rural areas by own shop and markets
	Calvary Farm	Producer	Pig meat producer as a farmer; Organizer of the "My Basket Customer Community" http://enkosaram.hu/page/homepage
	Cooperating Balaton Upland	Service	Association, performs expert activities for preserving the local values. Leader Local Action Group of Hungary
	Upper-Heathland Rural Development Association	Service	Leader Local Action Group of Hungary
	National Food Chain Safety Authority, Food and Feed Safety Directorate	Regulatory authority	Food Authority of Hungary
	Pannon Helyi Termék Nonprofit Kft.	Service	Local Product Nonprofit Organisation of Hungary. One of the first SFSC coordinators in Hungary, established in 2005.
	Research Institute of Agricultural Economics, Office Budapest	Policy	Small Scale Manufacturers Interest Representation
EL	BIOZO	Consumer	BIOZO – Bio-Consumer for a qualitative life – was founded on 23 September 2003 as a Consumers Association. The main goal of BIOZO is to mobilize and organize consumers in a dynamic Association with active presence and everyday action/involvement in local, national and international levels in order to protect and improve consumers' social and financial interests, contribute to food health and security, upgrade and improve consumers' quality of life.
	Ecotourism Greece	Service	Ecotourism Greece is a platform devoted to alternative and ecological tourism in Greece
	GENISEA Social Cooperative Enterprise	Producer	Genisea Koinsep is a womens' social-agricultural co-operative that produces and markets treacle from sugar cane.
	Hellenic Agticultural Organisation-Demeter/ Ministry of Rural Development and Food	Policy/regulatory authority	Interviewee is a food scientist and agricultural economist/ Hellenic Agricultural Organisation-Demeter/ Ministry of Rural Development and Food.
ES	(ENEEK) Basque Council for Ecological Agriculture and Food	Regulatory authority	ENEEK certifies organic production (organic production labels), and promote and distribute organic production in the Autonomous Community of the Basque Country. They support the commercialisation of very small, rural farms (1-2 people, families), and carry out

			initiatives such as setting up markets, fairs, and purchasing communal materials.
	European Coordination Vía Campesina	Producer	The European Coordination Via Campesina is a European grassroots organisation which currently gathers 31 national and regional farmers, farm workers and rural organisations based in 21 European countries. Rooted in the right to Food Sovereignty, their main objective is the defence of farmers' and field workers' rights as well as the promotion of diverse and sustainable family and peasant farming.
	AUSOLAN	HoReCa	The main business areas of AUSOLAN are aimed at the areas of catering and cleaning to communities: schools, businesses, health institutions and centers for the elderly. They are currently present throughout Spain. They have 17 offices and 16 central kitchens, which position this business group within the top three catering companies in Spain. They have started to expand into the international market, starting in Europe (France) and Latin America (Chile).
BE	Ghent Environment and Climate Bureau (Ghent Municipality)	Policy maker	The Ghent Environment and Climate Bureau oversees Ghent's urban food policy, "Ghent en Garde", which won a United Nations Global Climate Action Award in 2019. Ghent en Garde aims to strengthen short food supply chains in the city, while increasing sustainable production and consumption. According to the UN, the project demonstrates the potential to transform food systems at the local level.

3.2 Participant characteristics in each of the focus groups

Country	Focus group	Gender & age distribution	Number of participants per education level	Frequency of buying from farmers' markets/farm shops/ farm
Germany	Urban (n=8)	5 females (53, 22, 56, 25, 58 years old) 3 males (22, 26, 33 years old)	Upper secondary education: 2 Post-secondary non-tertiary education: 4 Bachelor or equivalent: 2	Less than once every 3 months: 3 At least once every 3 months:1 At least once a week: 2 Never: 2
	Rural (n=11)	7 females (26, 22, 57, 30, 51, 57, 29 years old) 4 males (33, 80, 36, 32 years old)	Upper secondary education: 3 Post-secondary non-tertiary education: 2 Bachelor or equivalent: 2 Master or equivalent: 3 Doctor or equivalent: 1	Less than once every 3 months: 7 At least once every 3 months: At least once a month: 1 At least once a week: 1 Never: 2
Spain	Urban (n=9)	6 females (51, 26, 46, 64, 42, 38 years old) 3 males (54, 43, 36 years old)	Upper secondary education: 3 Bachelor or equivalent: 5 Master or equivalent: 2	Less than once every 3 months: 3 At least once every 3 months: 2 At least once a week: 4
	Rural (n=9)	females (51, 35, 44, 24, 65, 57 years old) males (34, 62, 51 years old)	Lower secondary education: 1 Upper secondary education: 1 Post-secondary non-tertiary education: 1 Bachelor or equivalent: 6	At least once every 3 months: 4 At least once a month: 2 At least once a week: 3
Hungary	Urban (n=11)	7 females (54, 56, 43, 36, 34, 38, 36 years old) 4 males (49, 54, 37, 38 years old)	Lower secondary education: 2 Upper secondary education: 4 Master or equivalent: 6	Less than once every 3 months: 2 At least once every 3 months: 3 At least once a week: 6
	Rural (n=11)	7 females (63, 38, 29, 49, 28, 49, 56 years old) 4 males (43, 44, 32, 61 years old)	Lower secondary education: 1 Upper secondary education: 2 Post-secondary non-tertiary education: 1 Bachelor or equivalent: 3 Master or equivalent: 3	Less than once every 3 months: 3 At least once every 3 months: 2 At least once a month: 2 At least once a week: 4
Greece	Urban (n=10)	8 females (55, 64, 53, 68, 57, 56, 63, 39 years old) 2 males (68, 48 years old)	Lower secondary education: 1 Upper secondary education: 3 Post-secondary non-tertiary education: 2	At least once a month: 4 At least once a week: 6

			Bachelor or equivalent: 2 Master or equivalent: 2	
	Rural (n=9)	females (43, 43, 46, 63, 56, 65, 82 years old) males (48, 68 years old)	Upper secondary education: 1 Post-secondary non-tertiary education: 5 Bachelor or equivalent: 1 Master or equivalent: 1 Other: 1	At least once a month: 2 At least once a week: 7

3.3 Table of problems and solutions related to consumer engagement with short food supply chains (derived from both stakeholder interviews and focus groups)

Problem	Solution
Buying local food is inconvenient for consumers	Increase points of sale - e.g. supermarkets, farm shops, farmers' markets, online platforms, vending machines.
	Producers could form cooperatives to offer a greater variety of food at the one retail outlet.
	Producers could provide delivery to consumers or engage with distributers.
Local food is unaffordable for many consumers	Eliminate value-added tax (VAT) for direct selling.
	Implement a tax that takes into account the hidden costs of food in terms of its environmental and/or health impact. This could be in the form of true pricing or a scheme that decreases the rate of tax for labour, but increases it for the cost of resources.
	Change public procurement to make it easier for local food to be supplied at public institutions (at relatively lower prices).
	Discount supermarkets should attract regional suppliers and label regional products. If SFSC products can be made accessible to consumers under these business models, then more consumers would purchase such products.
Consumers lack awareness of: a) the social and environmental impact of food production, b) why food from small-scale production is more expensive than from large-scale production	Environmental awareness courses as part of the standard school curriculum (there are already some in the secondary school curriculum in Greece).
	The social impact of food production should be communicated at the national level, as this is likely to instil a greater sense of personal relevance for the greatest number of consumers.
	Disseminate information about how small-scale and organic production in general increase the cost of food but also provides social, environmental, and health benefits.
Lack of consumer confidence in SFSC	Have a certified quality label/scheme for local food (also helps consumers to identify local food)
	Try to find harmony between the different certifiers/schemes (e.g., as is done with Fairtrade and the EU organic label)
	Regulation of SFSC that is adapted to the short rather than the long chain
	Communicate traceability to the consumer via QR codes or a Url on the product that allows access to information about the origin of the product, production method, nutritional information, carbon impact, etc.
	Implement and inform consumers about independent monitoring to safeguard consumers against deceptive practices.
	Raise consumer awareness of who consumers can complain to and their rights concerning consumer protection.
	Educate SFSC producers about food safety regulations (e.g. making the Better Training for Safe Food initiative accessible to producers, https://ec.europa.eu/food/safety/btsf_en) and making it easier for them to be certified.
	Free tastings to increase exposure to local food and gain consumer trust

Need for communication and marketing strategies for SFSC and their products	Producers need to conduct their own market research to find out what the consumer wants, and/or what type of consumer is more likely to buy their particular type of product.
	Different SFSC producers could pool their marketing resources together (e.g., sharing a library of images, marketing templates), or such resources could be provided by organisations supporting SFSC or rural development.
	Local products need additional selling points, such as their quality, to appeal to consumers.
	SFSC producers should highlight the naturalness of their product, while explaining what it is about their product that makes it 'natural' (e.g., cultivation method, minimal processing, no additives).
	Low-cost marketing to consumers can occur via social media platforms such as Facebook and LinkedIn.
	Engage consumers by presenting them with information about local producers in a storytelling format.
	Local governments/associations could hold festivals and events celebrating SFSC/local food.