



Knowledge Exchange Seminar Series (KESS)

...is a forum that encourages debate on a wide range of research findings, with the overall aim of promoting evidence-based policy and law-making within Northern Ireland



Exploring Consumers' Quality Perceptions of Local NI Food & Drink Produce

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Local Food

CONSUMER MISTRUST
FOOD FRAUD
LOW COST FOOD
HIGH QUALITY PRODUCE

FOOD SCARES
ANIMAL WELFARE
TRACEABILITY LABELLING

TRACEABILITY
FOOD SAFETY
ENVIRONMENTAL SUSTAINABILITY
QUALITY SCHEMES
COUNTRY OF ORIGIN LABELLING

QUALITY

Logos: Queens University Belfast, The Open University, Ulster University, Northern Ireland Assembly

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ASSURED FOOD STANDARDS

PROTECTED GEOGRAPHICAL INDICATION

TESCO finest BRITISH GROUND MINCE

ORIGIN: **BRITISH BEEF**

CONTENT: **GROUND MINCE**

DESCRIPTION: SLOWLY MATURED FOR EXCEPTIONAL TENDERNESS, WITH DISTINCTIVE MARBLING THAT MELTS ON COOKING FOR A RICHER TASTE

EXPERT Brand Trimmings BUTCHERS

3 for £10 (E4 each)
 ROLL BACK £1 (E150 each)
 3 for £3 (E120 each)

BEST BEFORE 18 JAN (2)

218 USEBY MAY 29

Kellogg's **Lindt OF SWITZERLAND** **Heinz**

Research Context

Opportunities for Growth	Barriers to Growth
○ Northern Ireland's strongest industry	○ Expense
○ Reputation	○ Value for money and willingness to pay
○ Rich food heritage	○ Availability
○ Food deficit	○ Awareness
○ Demand for provenance	
○ Food Patriotism	
○ Creation of a Northern Ireland brand - no single body promoting local food	○ Creation of a Northern Ireland brand - no single body promoting local food



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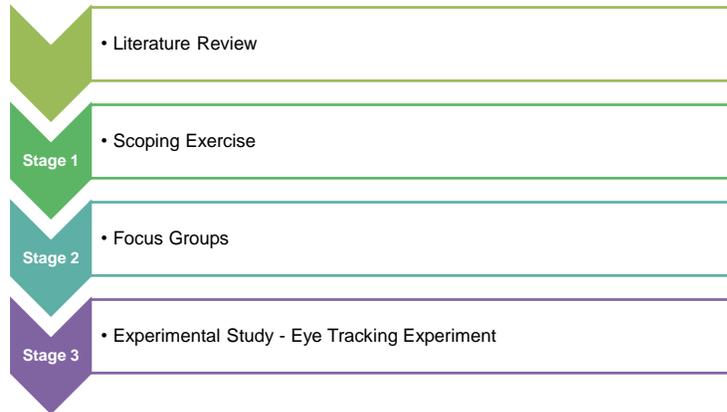
Aims & Objectives

- To explore consumer perceptions of the marketing of quality cues in regard to local/regional produce
- More specifically the objectives of this research are to:
 1. Systematically review the quality indicators and marketing cues used to promote local/regional produce
 2. Develop a conceptual framework of extrinsic cues for the promotion of quality in local/regional produce
 3. Investigate consumer perceptions towards quality indicators and marketing cues used to promote local/regional food produce
 4. Measure and evaluate the effectiveness of key quality indicators and marketing cues used on local/regional produce



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Research Design



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Scoping Exercise

Key Preliminary Findings

•Rationale: To identify NI produce and assess quality indicators and marketing cues

•Design:

- 1 Store visit across 8 retailers
- 3 Industry interviews

•Outcome:

- Key food trends were highlighted and reinforced e.g. the rise in popularity of the craft beer
- Enabled the narrowing and selection of food items to examine within the focus groups



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Focus Groups

Key Preliminary findings

•Rationale: To determine consumer perceptions towards the quality indicators and marketing cues used to promote local/regional produce

•Design:

- Total number of groups = 8
- Total number of participants = 40
 - Females = 26
 - Males = 14
- Analysed using NVivo 10

•Outcome: To narrow the focus of extrinsic quality cues to be analysed during the experimental study



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Focus Group Results

TOP FINDINGS/TRENDS



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Seeing is Believing

Transparent
 "...you can see that you're not being duped in terms of quantity or serving sizes and you can see the inherent quality of the product in its simplest form."

Colour
 "Dark colours, black, burgundy, dark green ...Because you associate own brand stuff being white, so anything different than that looks a lot better."
 "The colour of the packaging, Tesco Finest is now black and silver and that draws me towards it because it looks posh."

Condition
 "...if fresh food is packaged it would be off putting...when you go to a fruit and vegetable shop and you just have the stuff sitting...I don't mind that it's not all regular and that it's sitting neatly in a package with a nice clear cover on it...I'd rather lift my own and if it's all mucky that's OK"
 "...packaging sometimes puts me off, if there's too much packaging I get really annoyed...it's such a hassle to get rid of it afterwards...so I prefer when things don't have packaging."

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It's All in the Name

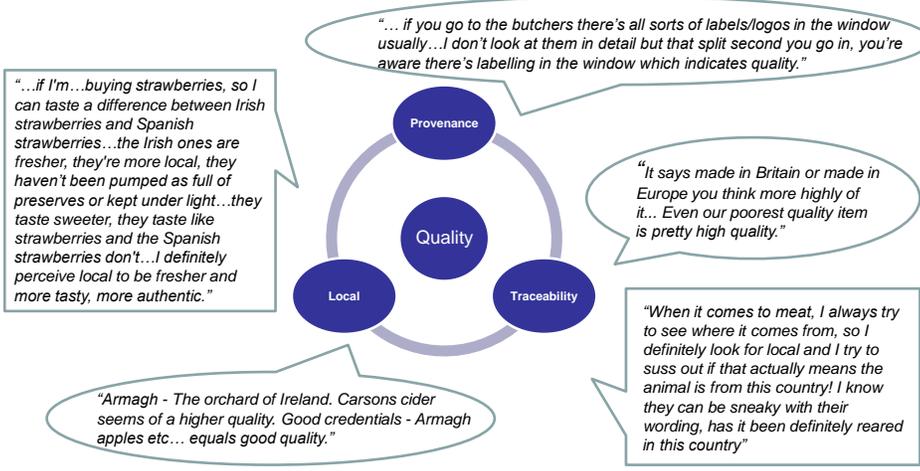
Trust
 "I have certainly found even when you're talking about butchers and local meat, there's definitely a difference of quality and you know what you're getting, the chicken breasts are bigger, bacon doesn't shrink...you know what you're getting and you know, there's trust and there's not as much pumped into it as the stuff that has to be preserved and flown from somewhere else."
 "You buy something you trust."

Experience
 "I'm like you [15577232], if I'm doing a supermarket shop I know what I want, I usually get the same stuff and rarely...I would have looked at labels before, so when I'm under time constraints I tend to not go for anything different."
 "...if it's something that we already know I've tasted the quality so I can go back to what I like..."

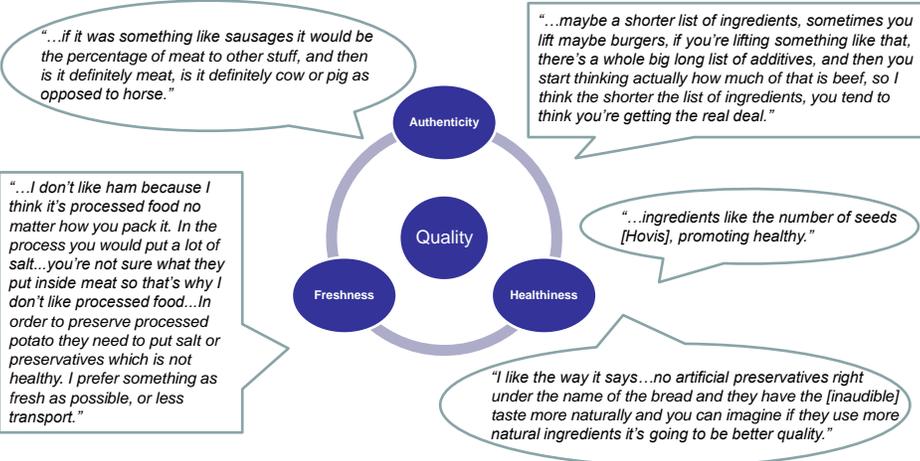
Reputation
 "...thinking of you know meat or sausages, if you know the butcher makes his own sausages, you think well the quality is probably better than some of the pre-packaged ones, Denny's."
 "...Hovis, cast your mind back to the Hovis lad that fell off the bike and it's an established brand..."

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Food Origins & the Rise of the Food Patriot



Content is King



Tantalising the Taste Buds

Quality

Taste Expectation

Key Descriptors

Flavour

"I put the Sensations because the garnishes seem fancier, smoked chilli & goat cheese, that's sounded like a nice touch."

"...the hand cooked, big letters right across the front of it gives the impression that there's more care gone into it, the Tayto, it's what you pick up on immediately."

"The writing outdoor bred which hints at the quality of life of the animal."

"...even the descriptions of the product are appealing and sound very good..."

"Mature Irish cheddar rather than cheese and onion."

"Use of word crisp - indicates fuller flavor"

"I'd buy that one, passion fruit, different flavour...Intriguing flavour."

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Experimental Study

Preliminary Findings

Rationale: To use an eye tracking device to investigate the effectiveness of extrinsic quality cues on the product packaging of a number of local products

Design:

- Total number of participants = 50
- Lab based setting
- Packaging photographed and presented in slideshow format
- Analysed using Microsoft Excel 2013
- Playback interviews (Nvivo 10)

Outcome:

- To triangulate all of the data
- To provide a more holistic and effective method of analysing the effectiveness of extrinsic quality cues

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Eye-Tracking Experiment Results

PRELIMINARY FINDINGS/TRENDS



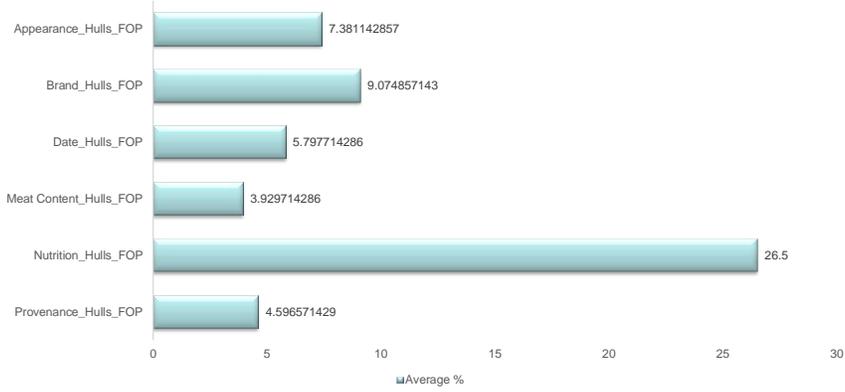
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Case 1 – Hull’s Sausages



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Case 1 – Hull’s Sausages

Nutritional Information

Factor 1: Healthiness

“I would always be looking for things with a lower fat content, I think it’s just something I do...so if I was actually looking to buy...and I was comparing 2 I’d be looking for one with the lower fat....probably because I used to teach a lot nutrition and would therefore be very conscious about trying to making healthier decisions.” (Primed Participant 14)

Factor 2: Meat Content

“I always look at the pork %...to see which ones got the higher meat content...because I think it’s better quality, cos it’s got more of the actual meat in it than the other stuff added into it.” (Primed Participant 20)



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Case 1 – Hull’s Sausages

Brand Name

Factor 1: Familiarity & Previous Experience

“I’ve never heard of them, and they’re only in Ballymena, so I kind of thought why have I never heard of them. Although it is a local product I didn’t associate them with being local.” (Primed Participant 20)

“I know this product...once you see the name, I think with that product, if you’ve bought that product once...and you know that product it doesn’t really matter what they packaging is like cos that’s a good sausage. I know that product and I buy it. So the Hull’s it doesn’t need to stand out in the shop to me.” (Unprimed Participant 1)



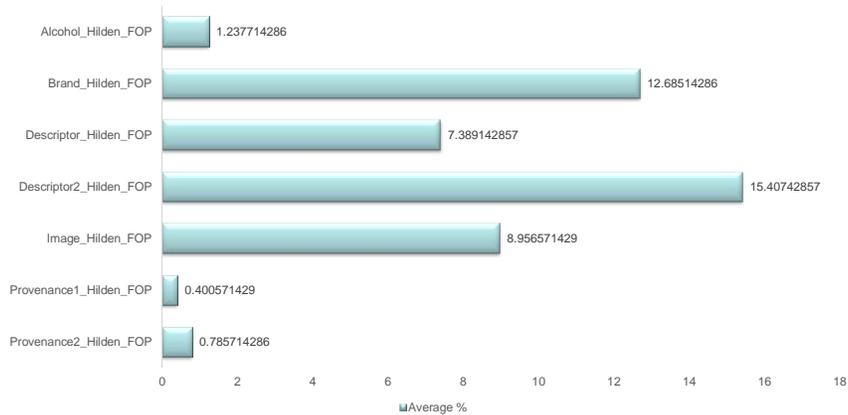
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Case 2 – Hilden Beer



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Case 2 – Hilden Beer

Key Descriptor – Barney's Brew

Factor 1: Story creates intrigue

"I was just trying to figure out what it was. I was trying to figure out who that man was and then I read Barney's Brew...it did try to relate it to somewhere local so I suppose that man is from Belfast." (Unprimed Participant 3)

"What is the relevancy of this man being on the front of this to the actual product?...I'm assuming he's Barney...I kind of made that association...the title of this is Barney's brew so I'd be inclined to think that this person is Barney." (Primed Participant 2)

Attracted to the...story behind it. It was compelling, you know it would stop you if you were looking for a craft beer (Primed Participant 24)



Case 2 – Hilden Beer

Brand Name

Factor 1: Familiarity & Previous Experience

“...the fact that I know it was Hilden Brewery and I know again where they are, it’s a local product [associated local with higher quality]. I know that, again because it was Hilden, I would actually associate that with quality because they do nice quality beers.” (Primed Participant 14)

“Those local breweries have a great reputation...very high quality...the micro-breweries here particularly in NI have picked up in recent times...they are selling it on their heritage...It’s local authentic beer” (Unprimed Participant 12)

“The name, the brewery itself is renowned for its’ quality so it’s a name that springs to mind straight away.”(Primed Participant 13)



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Policy Recommendations

- The creation of a unified, focused method to promote local NI food/drink produce
- To better understand the local shopper, in order to tailor marketing strategies which more effectively promote the quality of local NI produce
- An increase in marketing spend, to avail of the current spotlight and promote NI food and drink locally and further afield
- To adopt and invest in innovative and exciting techniques to gather this data, such as eye-tracking technology
- To share this knowledge with SME NI agri-food companies to help small food/drink businesses in NI to grow, thus encouraging the development of a more sustainable economy. Fulfilling, at least in part, key priorities as outlined in the Going for Growth Strategy and the NI Executives Programme for Government.



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Conclusions

- We must capitalise on the opportunity provided by the NI year of Food and Drink 2016 by promoting the quality of our produce [#enjoyNI2016](#)

The Consumer is Key:

- Understanding consumer perceptions of quality is fundamental to the success of the agri-food industry

The Power of Packaging:

- Packaging has the potential to entice consumers to try products they have never experienced before. We must learn to promote NI produce more effectively on the shelves or risk being overlooked.



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Northern Ireland
Assembly



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