Consumer attitudes to Cornish Produce

A report on
Cornwall Taste of the West consumer surveys
June 2002

Ruth Huxley
Cornwall Taste of the West

Consumer attitudes to Cornish Produce

A report on Cornwall Taste of the West consumer surveys, June 2002

Introduction

The concept of buying local foods is currently enjoying a high profile, but is this groundswell being matched by a shift in consumer buying patterns and, if so, what are the factors that have been most influential in prompting this shift and is anything restricting it? Two surveys have recently been carried out by Cornwall Taste of the West with the aim of gaining a better understanding of consumer attitudes to, and perceptions of, the issues surrounding local food purchasing.

The surveys were carried out at the Royal Cornwall Show, Wadebridge, between 6th and 8th June, 2002, with visitors to Cornwall Taste of the West's stand being asked to complete a questionnaire in return for free entry into a daily draw to win a hamper of Cornish foods. One survey was intended for residents of Cornwall, asking them where they buy local foods, why they do so and what might encourage them to buy more (see Appendix A). The other questionnaire was given to people visiting the county, reflecting the significance of tourism on the local economy. This survey asked people whether they had tried local foods whilst in Cornwall, how much they had enjoyed them and whether they were likely to purchase any once they returned home (see Appendix B).

Part 1: Findings of the Cornish residents' survey

Regular purchase of local foods

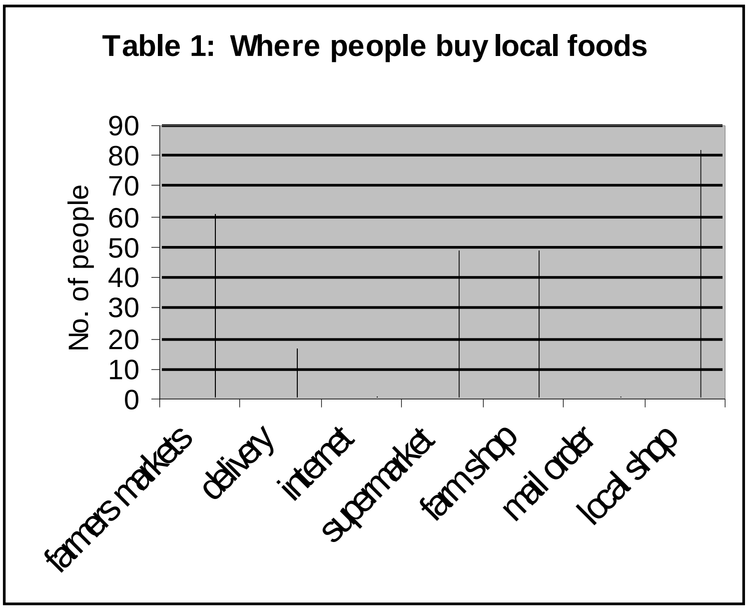
97.5% of the 120 respondents said they regularly purchase locally produced foods. Although the sample is unlikely to be truly reflective of the general population (it can be assumed that a large proportion of those stopping at the Taste of the West stand will have at least some interest in local foods) this figure is remarkable when compared with the result of a survey carried out nationally by the Institute of Grocery Distribution earlier this year (Dawson, 2002), which found only just over 9% of the population answering positively to the same question.

Eating out

Equally significantly, 89% said that, when eating out, they choose items specifically because they have been prepared from local ingredients. There was little variation between age groups here, with, for example *all* the 21-30's and *all* the over 65's in agreement with this statement.

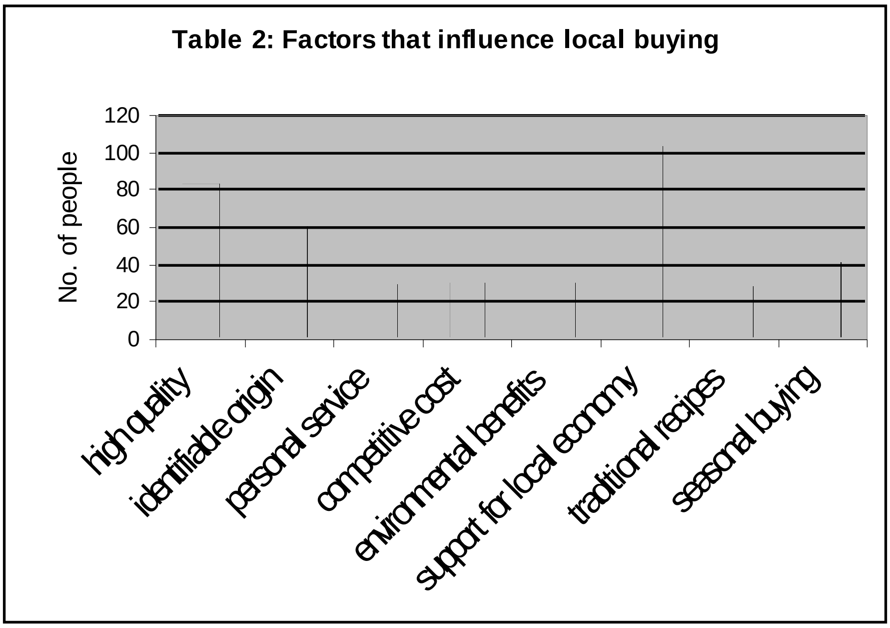
Where people buy local foods

Local independent shops are where most people find local foods (see Table 1). Farmers' markets also play an important role, with 50% of those who buy local foods using them. Farm shops and supermarkets are used by an equal number of respondents - about 40% of the sample - for local produce purchases. Home delivery accounts for a significant minority of purchases (15%), whereas less than 1% use the Internet and mail order.



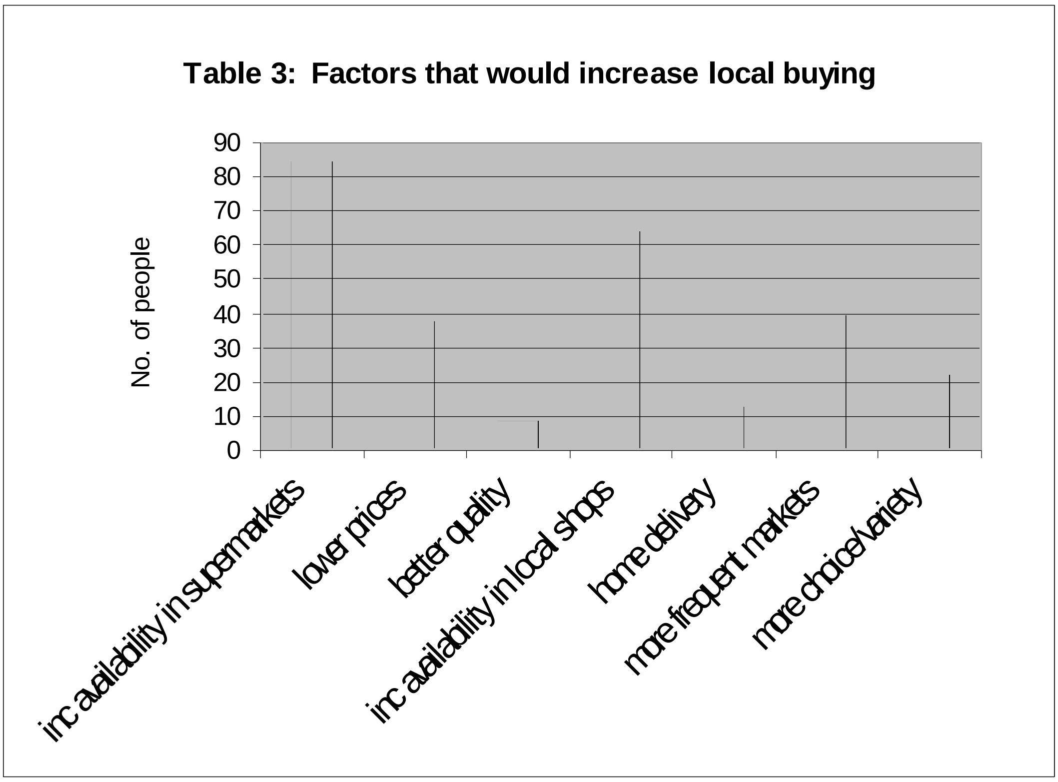
Influential factors

Overwhelmingly, local people buy Cornish produce in order to support the local economy, with the high quality of the products being the second most popular reason given by respondents for doing so (see Table 2). The ability to identify the origin of purchases is also important. Buying in season, personal service, environmental benefits, competitive cost and traditional recipes are all factors that influence 30 - 35% of respondents to buy local produce.



Increasing local buying

Over 70% of respondents would buy more local foods if they were more readily available in their supermarket and 53% would like to find more in their local shops (see Table 3). Lower prices, more frequent markets and more choice or variety of produce are the next most important factors and about 10% of respondents feel home delivery might make a difference. Significantly, no more than 7.5% feel any improvement in quality is needed.



Age-related findings

Approximately 70% of respondents were aged between 31 and 65, and of those, most were in their 40's. However, remarkably few of the issues covered by the survey appear to be age-sensitive, and those that are, do not necessarily produce the results that might logically be expected. For example, those most likely to use their local shop for local food purchases are the under 30's, with the over 50's the least likely to do so. The under 30's are also the most appreciative of the high quality of local produce, and find buying in season more important than environmental issues. They even place more value on traditional recipes than the over 65's. Over 65's, who might be expected to be becoming less active and find home delivery useful, do not make use of this service.
Perhaps more in line with expectations are the findings that farmers' markets are used mostly by the over 50's and least by the under 20's (with a fairly even spread throughout all other age groups). Supermarkets are used mostly by the under 20's and farm shops are used most frequently by all age groups over 40. Over 65's value personal service more than other age groups.
Support for the local economy is strong throughout, but notably from groups aged between 21 and 40 and over 65.

Problems in local food sourcing

Respondents were asked to state whether there are any foods they would like to buy from local sources but are unable to find. The most commonly stated difficulty is finding regular supplies and sufficient variety of good, fresh, local fruit and vegetables. Fresh local fish is also hard to find. These are interesting findings in a county where these things are produced in abundance. In fact, with perhaps the exclusion of cherries, every item listed as being difficult to find (apple juice, honey, wine, cheese, water, to provide examples) *is* produced and available commercially within the county.
Some of those who stated that they buy seasonal produce, would nonetheless like to see that season extended of possible. This was mentioned specifically in relation to local apples and salad.
Apart from one request for organic cheese biscuits (these, too, are available), no requests were made for processed or convenience foods of local origin.
The need for more local produce outlets, such as farmers' markets, in the North East of the county was stated on several occasions.

Anomalies

Some of the responses indicate how consumers' demands may not always be reasoned or reasonable. For example, in spite of adverse publicity about buying from supermarkets being the least effective way of supporting local economies, and growing concern about the number of 'food miles' a product travels, 60 - 80% of respondents who said they buy local foods to support the local economy or because doing so might be of benefit to the environment, would like to buy more local products from the supermarket shelf.
A similar proportion of those who buy locally because of the personal service they receive would also like to buy more from supermarkets - not, of course, renowned for their personal service.

Virtually all of the small number who would like to see an improvement in the quality of local foods also stated that they buy local foods *because* of their quality. And about 10% of respondents buy because of competitive prices, but would like prices to be lower still.

Part 2: Findings of the survey of visitors to Cornwall

The number of visitors to the county calling at the stand was much smaller than anticipated, especially as the show coincided with school holidays and the Golden Jubilee break, and of those who completed the visitors' questionnaire, 40% were day visitors from the neighbouring county of Devon, rather than holiday-makers. The resultant sample is therefore much too small to be relied upon, although some of the findings are worthy of note: -

1. Virtually all had tried local foods whilst visiting.
2. Almost 70% select places to eat or stay because they offer local produce.
3. Clotted cream and pasties were the products tried most frequently, with ice cream, fudge and cider also featuring prominently. ALL of the 67 products tried were rated either excellent, very good or good, as follows:
   Excellent - 35 products
   Very good - 27 products
   Good - 5 products
   Notably, clotted cream was rated excellent by 12 of the 14 people who had tried it.
4. 14 of the 22 respondents buy Cornish products when they return home, with clotted cream again featuring as the product most likely to be bought, followed by pasties. 6 use mail order and 4 buy via the Internet.
5. The local products people would have liked to buy but could not find were fresh fish, cheese and 'proper' pasties.

The survey will be followed up at other events during the year in order to gain a more representative sample of visitors to the county.

Conclusions and recommendations

Both surveys show that the quality of locally produced food and drink is perceived to be very high and that consumer support from within and beyond the county is strong. Strong foundations therefore exist for any development of the sector.
Consumer perceptions of Cornish produce relate almost entirely to fresh produce. The only processed products that people think of as Cornish are the traditional products such as pasties and saffron buns. All are genuinely highly rated. Clotted cream and pasties are bought and enjoyed; they are not simply a novelty factor that comes as part of a Cornish holiday and because of this these products are successfully marketed out of the county. People will order specific items by mail order or via the Internet from elsewhere in the country if they rate them highly enough.
Within the county both residents and visitors appear to be more than willing to support the use of local produce by the catering, leisure and tourism sectors, confirming that there is enormous scope in these areas.

The availability of some products needs to be examined. Are all the local fresh fish and fruit and vegetables exported out of the county, are they not being marketed effectively, or are consumers not prepared to look for them?
Careful consideration needs to be given to the retail system for local foods. For example, if local independent shops are the main suppliers of local foods, what will happen if they continue to decline in number? Could their future even be secured through the development of a more effective and mutually beneficial supply system between local producers and retailers? Can farmers' markets be developed to make them more attractive or accessible to younger generations?
There is a clear need for an increased understanding of the issues surrounding local food production to be developed between producer and consumer, although the findings of these surveys strongly imply that the need for convenient access to local foods overrides all other issues for consumers. The feasibility of meeting the high demand for an increased quantity of local foods in the supermarket therefore needs to be explored to determine, for example, whether doing so would increase the overall sales and prominence of local foods or simply pose a threat to the existing local supply chain. The way in which the organic sector has developed might provide a useful model for comparison.

Reference

Dawson, A (2002) ***Consumer Watch 2002*** Institute of Grocery Distribution: Watford