

Literature review WP 4

Germany

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Review report

1. IDENTIFICATION OF THE MOST RELEVANT RESULTS

Besch and Prachhart (1988, p.627f), by questioning a representative sample of German private households (n° 1003), observe, that in 53 % of the households the origin of the products is being paid attention for in the buying process. Interviewees, who pay attention to products' origin, are described as «wide-minded, with a great willingness to pay and of relatively high revenues.

A conjoint-analysis (n° 407, non-representative) run by **Sattler (1991)** focused on a regional label in the «land» Schleswig-Holstein. Sattler concludes that the label is of a higher importance to a specific group of consumers and that its effectiveness in the buying decision depends on the combination with well-established brands.

Interviewing of some 1.400 private households and of some 700 farmers was done by **Hensche et al. (1993)** in the German Land of Nordrhein-Westfalen. The consumer research results suggest that some 48 % of the consumers are interested in the origin. Some 33 % are exclusively caring for food safety.

A representative research on consumer behaviour run by **Alvensleben and Gertken (1993)** in the city of Kiel and in three areas in the «New» Laender (former GDR) suggests that the importance of origin is differing between the regions (from 60 to 83 %). The authors conclude, that patriotism seems to play a decisive role, because the highest preferences are always accredited to the «own» region». «Second best» origins are those of neighbouring regions, followed by region of a high tourist interest». They observe as well, that regional Labels have a minor importance in the buying decision, even if they are notorious. Yet, Alvensleben and Gertken believe, that regional labels offer some chances for small and «unknown» brands but they are still reminding, that regional labels can also equalize the offer and are a potentially competing with established brands. The authors recommend: If a regional label is concentrating on the origin, brand-owners might do better to integrate the regional origin directly in the brand- or product-communication, and not to use the regional label. A second survey, which was run exclusively in Kiel (n° 265), showed a slight growing of the preferences for regional products, mainly in the fresh-food sector. Alvensleben concludes that regional origin should be signalled clearly and that the emotional link between the consumer and its region should be strengthened.

In 1995, **Balling (1995, 2000)** is analysing the results of 1.397 short interviews that were conducted in Italy, in the United Kingdom, in France, in Slovenia, in the Czech republic, and in Poland, on the topic of Bavarian food products. His results allow the conclusion that the origin «Bavaria» is, in most countries, more positively associated than the origin «Germany», as far as food is concerned. Based on these results and on two other surveys, done in Bavaria in 1996 (n° 1076) and 1999 (n° 956), Balling stakes the following thesis:

- In food, origin is gaining attention
- The smaller the region of origin, the more significant is the preference for its food in the very same region
- The globalisation and the growing importance of internationally standardized products are further strengthening the importance of «origin»
- The degree of transformation and convenience, the product-specific uncertainty (i. g. beef) and, particularly, labelled regional specialities influence the perception of origin.
- Consumers' attitudes towards origin-labelled food differ between regions.

Wirtghen et al (1999) did, in 1999, a consumer survey (n° 328) in the German «Laender» of Hesse, Thuringia and Saxony-Anhalt. By means of an item-battery they studied consumer's attitudes towards regional products and specialities, confirming, that there is preference for regionally produced food. Other criteria, as «freshness», «taste» and «health» still are important purchase motifs, but especially regional food stand to benefit from their «image of freshness and quality». This positive image results in consumers' readiness to pay a price premium for regional products, what is not consequently exploited by producers. Country-of-origin-effects are especially important, when information on specific markets and prices are rare.

Sirieix and Schaer (1999) did a comparative study in France and Germany on the reciprocal importance of the quality cues «regional» and «organic». The data collection process consisted of computer-aided telephonic interviewing of two random samples in two regions: 616 persons in Bavaria (Germany) and 203 persons in Languedoc-Roussillon (France). Most consumers prefer food from their own region. For example, when asked to express their opinion to a statement « I usually have more confidence in food of my region », some 80 % of the interviewees agreed. A more precise statement « If it was

possible, I would only buy food products from my region » was agreed by 62 % of the respondents. A third statement, «Local origin of organic food is important » was agreed by 80 %. Nevertheless, important differences appear between the two regions: for Bavarian respondents, local origin of food is more important than for respondents in Languedoc-Roussillon.

Richter (2001) interviewed some 2.500 consumers in three regions: southwest Baden (German «Land» bordering France and Switzerland), the French region Alsace and the region of northeast Switzerland. In each region consumers do rate regional origin as important in their food choice. In the German and in the Swiss region most respondents rate regional origin higher than prices and appearance, while in Alsace consumers are more attentive to prices and quality. The results of a cluster analysis suggest that a regional-and-environment-orientated type of customer exists in every of the three regions. This cluster regroups some 28 % of the consumers in Baden (Germany), some 24 % in northeast Switzerland and some 18 % in Alsace.

2. SELECTION OF SCIENTIFIC AND RECENT (SINCE 1990) PAPERS, PUBLICATIONS, MEMORIES AND STUDIES IN THE COUNTRY (INCLUDING INTERNATIONAL AND NATIONAL MEETINGS HELD IN ENGLISH)

2001

CMA

Leitlinien für Zentral-Regionale Kooperationsprojekte.

CMA-online www.cma.de vom 04. März 2001

Hausladen, H.

Regionales Marketing. Ein Marketing management-Ansatz für klein räumige Kooperationsprojekte zur Erzielung regionaler Wettbewerbsvorteile.

Dr Thesis, TU München Weihenstephan.

Richter, T.

Kaufverhalten, Einstellungen und Kenntnisse der Konsumenten in der Regio Trirhenia (Süd baden, Elsass, Nord westschweiz)

in Bezug auf regionale und umweltgerecht erzeugte Nahrungsmittel. Frick (CH).

2000

Alvensleben, R. V.

Verbraucherpräferenzen für regionale Produkte.

In: Werner, W. ; Böttcher, J. ; Isermeyer, F. ; Kalm, E. ; Otte, A. (Hrsg.): Regionale Vermarktungssysteme in der Land-, Ernährungs- und Forstwirtschaft, Frankfurt, S. pp 3-18

Alvensleben, R. V.

Zur Bedeutung von Emotionen bei der Bildung von Präferenzen für regionale Produkte.

AW (Agrarwirtschaft) 12, pp 399-402

Balling, R.

Ergebnisse von Verbraucherbefragungen zur Bedeutung der regionalen Herkunft bei Lebensmitteln.

In: Werner, W. ; Böttcher, J. ; Isermeyer, F. ; Kalm, E. ; Otte, A. (Hrsg.): Regionale Marketing-Konzeption im Agribusiness: Theoretischer Ansatz und empirische Überlegungen, Frankfurt, S. 19-37

Besch, M. ; Hausladen, H. ; Thiedig, F.

Verbraucherpräferenzen für regionale Produkte.

In: Werner, W. ; Böttcher, J. ; Isermeyer, F. ; Kalm, E. ; Otte, A. (Hrsg.): Regionale Marketing-Konzeption im Agribusiness: Theoretischer Ansatz und empirische Überlegungen, Frankfurt, S. 38-54

Grienberger, R.

Die Herkunftsangabe als Marketinginstrument.

Mainz.

Thiedig, F. ; B. Sylvander

Welcome to the club ? An economical approach to geographical Indications in the European Union.

In: *Agrarwirtschaft*, 49. Jg., vol. 12 7 dec. 2000, p. 428-436.

1999

Besch, M. ; Hausladen, H.

Regionales Marketing im Agribusiness.

Schriftenreihe der Landwirtschaftlichen Rentenbank (Schriftenreihe der Landwirtschaftlichen Rentenbank) Band 13, pp 7-50

Hausladen, H.

Qualität geht vor Region.

n:DLG-Mitteilungen, 01, pp 16 /17.

Koob, C. ; Weber, M.

Erfolg durch authentizitäts orientiertes Marketing.

Absatzwirtschaft (Absatzwirtschaft) 4, p. 74-81

Meyer, A.-J.

Regionalmarketing : Grundlagen, Konzepte, Anwendungen.

München.

Sirieix, L. ; Schaer B.

Les produits biologiques locaux: quels perspectives?

In : Lagrange, L. (Ed. 1999): *Signes officiels de qualité et développement agricole*. Clermont-Ferrand, Frankreich, S. 241-246.

Wirthgen, B. ; Kuhnert, H. ; Altmann, M. ; Wirthgen, A. ; Osterloh, J.

Die regionale Herkunft von Lebensmitteln und ihre Bedeutung für die Einkaufsentscheidung der Verbraucher : auf der Basis von Verbraucherbefragungen in drei benachbarten Regionen Deutschlands.

(*Berichte über Landwirtschaft*) 77, pp 243-261

1998

Becker, J.

Marketing-Konzeption: Grundlagen des strategischen und operativen Marketing-Managements,

6. Aufl., München

Klaus NoyenResearch

Spezialitäten bei Speisen und Getränken in Deutschland.

Bonn.

1997

Besch, M. ; Prummer, S.

Regionale Marketingkonzepte auf einzelbetrieblicher und kooperativer Basis.

In: Bauer, S. ; Herrmann, R. ; Kuhlmann, F. (Hrsg.): *Märkte der Agrar- und Ernährungswirtschaft - Analyse, einzelwirtschaftliche Strategien, staatliche Einflussnahme* -, Münster-Hiltrup, S. 327-338

Wolfram, R.

Entwicklung des ländlichen Raumes – Konzepte zum Aufbauregionaler Vermarktungsstrukturen in Nordrhein-Westfalen.

In: *Agra-Europe*, Heft 12, Sonderbeilage 1– 18

1996

Thiedig, F.

Regional typische traditionelle Lebensmittel und Agrarerzeugnisse: Kulturelle und ökonomische Betrachtungen zu einer ersten Bestandsaufnahme deutscher Spezialitäten.

Arbeitsbericht der Professur für Marktlehre Nr. 21, 1996

1995

Balling, R.

Der Herkunftsaspekt als Erfolgsfaktor für das Lebensmittelmarketing.

Ber. Ldw. (Berichte über Landwirtschaft) 73, pp 83-106

Troegel, T.:

Konsumentenverhalten bei Nahrungsmitteln in Mecklenburg-Vorpommern.

Rostock.

1994

CMA

Welche Chancen haben deutsche Spezialitäten im In- und Ausland ?

Referate, Forschungsergebnisse und Thesen. Bonn.

1993

Alvensleben, R. V. ; Gertken D.

Regionale Gütezeichen als Marketing instrument bei Nahrungsmitteln,

Agrarwirtschaft 42, 6, 247-251.

Hensche, H. et al

Verbraucher präferenzen für Nahrungsmittel aus der näheren Umgebung – eine Chance für markt orientierte Landwirte.

Marketing der Agrar- und Ernährungswirtschaft, Band 7, Kiel.

Kühn, R.

As "Made-In-Image" Deutschlands im internationalen Vergleich.

Marketing ZFP (Marketing Zeitschrift für Forschung und Praxis) Heft 2,II Quartal, pp 119-127

1992

Gierl, H.

Der Einfluss von Wertorientierung und Werten auf das Konsumenten verhalten.

Der Markt (Der Markt) 31, pp 161-171

Loschelder, M. ; Schnepf, W.

Deutsche geographische Herkunftsangaben.

Käln.

1991

Sattler, H.

Herkunfts- und Gütezeichen im Kaufentscheidungsproze : Die Conjoint-Analyse als Instrument der Bedeutungs messung.

Ph.D. Dissertation, Universität Kiel. (N)

1990

Gerschau, M.

Die Herkunft von Lebensmittel als Mittel zur Produkt differenzierung.

AW (Agrarwirtschaft) 39 Heft 9, pp 273-276

1989

Obermiller, C. ; Spangenberg, E.

Exploring the effects of origin labels: An information processing framework.

Advances in consumer research (Advances in consumer research) 16, pp 454-459

1988

Baade, E.

Analyse des Konsumenten verhaltens bei alternativ erzeugten Lebensmitteln. Ergebnisse einer Kunden befragung.

in München. Ph.D. Dissertation, TU München. (N)

Besch, M. ; Prachhart, M.

Landwirtschaftliche Marktforschung in Bayern: Die Herkunfts bezeichnung bei Lebensmittel als Kaufmotiv.

Bayerisches landwirtschaftliches Jahrbuch (Bayerisches landwirtschaftliches Jahrbuch) 65 Heft 5, pp 623-640

Discussion report

In Germany, labelling of regional origin of processed food (origin-linked typical /traditional products and specialities as conceived by the EU regulations 2081/92 and 2082/92) is not yet very common, contrary to other European countries (Italy, Spain, France) (comp. Thiedig, 1996). Geographic origin is often used in marketing of fresh products, and consumers' motivation to pay attention to it results partly out of environmental concerns (comp. Becker, 1998, S. 16 and Besch et al,2000).

A central point of the dynamic researchon Country-of-Origin-Effects done by Balling and Alvensleben, is its growing importance in preferences for food. Both authors relate this phenomenon to the fact, that the consumers basic needs are satisfied and that, consequently, wishes for further benefits arise. On the other hand, originis relatively easy to communicate and does not need expert knowledge to be understood (Wirthgen et al. 1999).

The integration of «regional origin» into conceptions of food marketing seems to meet rather well German consumers' wishes and needs (Besch et al. 2000).

The attractiveness of regional origin is based on its hedonistic (food taste, evoking of holiday feelings and memories), its quality (freshness) and its food safety (tractability) elements. Labelling of the regional origin might be well suited to complete a products (positive) image.

But, at the same time, the regional origin is more likely an «information supplement» and an additional, relatively small factor in the individuals buying decision process. Appearance (Hausladen, 1999, p. 17), and prices (Richter,2001, p 267) for example, are often more important than the regional origin. Most consumers' preferences for regional food seem to be stronger for certain kinds of products: beef and meat, fruits, vegetables (Hausladen, 1999).

Other elements interfere within the products perception : prices, of course, but also brands, as well as the degree of transformation and the production method (organic, for example).

The following questions arise out of this literature survey:

How does regional origin interfere with other cues (production method, quality labels, brands)?

To what extent does the importance of regional origin depend onthe category of product (fresh / transformed)?

Are there food outlets where the origin is less / more important or where it is perceived otherwise?

How is «regional origin» perceived incomparison to «regional typicality» «regional speciality» and «traditional speciality»?

The answers to these questions – will they differ between European countries?

