

The Role of Regionality in the Marketing and Branding of Food

A report for



by Jane Bennett

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Foreword

Businesses and governments who aim to use regionality or place of origin as a component of marketing produce will benefit greatly from understanding the drivers and inhibitors involved in successful regional branding.

Across the globe food produced in specific regions is sold and marketed on the attributes of the production location with varying degrees of success. Although there are many factors that may contribute to the success or failure of using regionality to market and brand food it would seem that these are often not clearly understood.

This Nuffield study funded by Rabobank has involved visiting a number of regions of the world, to study some of the food businesses within the region with the objective of identifying the key success factors in the production and branding of regional foods. As a result the study provides valuable research for regional food producers and Governments seeking to grow agricultural production and value to enhance regional Australian economies.

The most important finding of the report centres on the importance of convenience and meeting the needs for the end use that influence consumer purchasing decisions. Provenance is not the key driver of consumer purchasing decisions but importantly provides a set of values that may assist consumers in their decision making. Regionality is a component of provenance that is particularly influential in purchasing decisions for affluent regional consumers.

In creating regional development strategies it is important for Government and industry to understand the importance of building uniform brand values for the region and its products to reinforce the brand message. No one will support regional produce more than the people within the region so maximising the capacity to market within the region to locals and tourists is an essential component of any regional food strategy.

The recommendations set out at the end of this report are designed to assist industry and Government to develop strategies and policies to enhance markets for regional produce. A vital finding of the report identifies the different contributions that can be made by Government and industry to a successful regional brand.

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Executive Summary

Increasing the returns to farmers and food producers through improved marketing and branding of produce is a key objective of most agricultural and food industry economic development plans. Utilising attributes of the region of production to add value is seen by many producers and Governments as a desirable way to improve economic returns to industry and the broader community.

This report is the result of visiting a number of businesses and Government agencies across Britain, Europe, USA and Canada to identify the things that do and don't enhance the capacity to market regional produce. Some research work has also been undertaken through the study of industry reports and internet research.

The findings and recommendations of this report have relevance to a number of stakeholders in industry and government including;

- Individual businesses looking to utilise regionality to enhance the marketing of their brand
- Industry groups looking to add value to produce through regional identification in the market place
- Governments looking to grow or value add to the agricultural and food industries in their region
- Governments and industry looking to grow tourism in regional Australia.

My personal interest in the role of regionality in the marketing and branding of food has developed over a number of years through participation in the Tasmanian and National Food Industry Councils and board membership of the Brand Tasmania Council. Before embarking on the Nuffield journey I sought from this study a solution to value adding to regional produce using place of origin branding and to identify ways in which government and industry could work together to build markets.

The greatest lesson learned from this Nuffield Scholarship is that the product itself is more important to the sale than the provenance. Of the many businesses visited in this study the really successful brands of regional origin concentrated on the distinguishing attributes of the product to market them. These attributes were reflected in the values of the region and reinforced the brand.

In January 2008 I participated in the Worshipful Company of Farmers Advanced Course in Agricultural Business Management in Kent UK as an additional component of my Nuffield Scholarship. A marketing assignment of the course studying potatoes included consumer research in supermarkets which provided firsthand experience of the importance of the end use in consumer choices. When asking consumers why they had selected a particular bag of potatoes they would often respond “because of the price”. If then asked why they had chosen that bag out of 5 identically priced options they would respond “because I am doing mashed potato and these are a good mashing variety”. If informed we were conducting research on behalf of British farmers before asking why they had chosen their potato bag they would mostly respond “because they are British”. When further pressed about why they had selected that particular bag in preference to any other of up to 40 other British identified options they would respond “because I am cooking a roast and these are good baking potatoes”. Ultimately the choice of potato was determined by what the consumer planned to do with it. Other factors such as price or regionality were secondary factors in the decision making process.

A person selecting a bottle of wine to purchase will generally focus firstly on the occasion or the food to accompany the wine before selecting a type of wine. The region of origin becomes an important factor once the grape variety or wine style has been selected. Similarly it is the occasion in which it is to be eaten that determines most cheese purchases – party platter, sandwich ingredient, cooking or a cheese platter for the end of a meal. Different choices will be made for each end use and differing issues of provenance may therefore influence the purchase decision.

This report demonstrates a number of ways that regional Governments and producers can utilise regional identity to enhance markets for regional produce. The most important lesson that Governments and producers can learn from this study is that the role of regionality like all aspects of provenance is to underpin the values of the brand and enhance its appeal. The product itself must meet a desire of the consumer and provide some form of convenience before it will be a contender for purchase.

When developing regional branding strategies it is critical that Governments and industry understand that the individual brands and products of the region must strive to meet consumer expectations and provide convenience and not rely on regionality to sell the product.

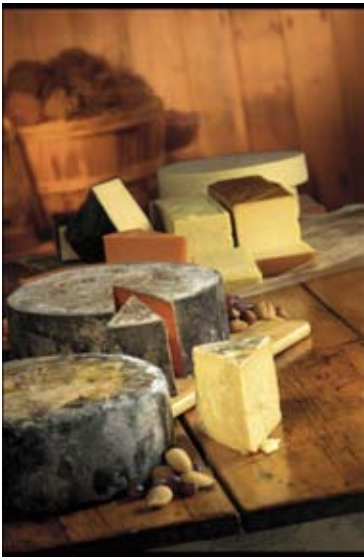
Regional produce marketing strategies need to focus on the local market first before attempting to engage external markets. Attempts to market regional produce outside the region need to focus on the intended market and what the market is seeking from provenance of products. Markets that value provenance are generally seeking verification of the provenance claims which means that the provenance of organic or certified systems of production will be more highly prized than simply regionality.

Introduction

I manage a farm based dairy processing operation in Elizabeth Town in Tasmania called Ashgrove Cheese. We produce cheese, liquid milk and ice cream. Branding our products as Tasmanian has been an important part of our business strategy since the business commenced sales in 1994. Experience over the past few years through involvement with State and National Food Industry Councils and the Brand Tasmania Council has highlighted to me the importance of regional branding and increased my desire to better understand the components of regionality that are valued by consumers.



1. Richard Bennett – Production Manager
Jane Bennett – Managing Director
Paul Bennett – Farm Manager



2. Ashgrove Cheese Products

Agricultural industry sector strategic plans for Tasmania or other States invariably include a section relating to value adding and moving away from dependence on commodity markets through differentiated marketing and branding.

This study examines how regions of the world utilise regionality to market and sell food and understand what drives consumer purchasing in this area.

The recommendations of this report are set out in the final chapter. These are intended to provide guidance to industry bodies, individual businesses and government on how to improve the returns to farmers and food processors in regions.

The chapters of the report reflect the various components that are important to regional food marketing;

1. Common themes of successful regional brands - looks at locations of the world that have successful regional identities and the common elements of that identity.
2. Products with Provenance - analyses a British report on what drives consumer purchasing for products with provenance.
3. Regionality in Retailing - examines the ways in which different retailers and businesses utilise regionality to build sales.
4. Culture is evolution not archaeology - examines the role of legal protection for regional food in preventing imitation.
5. Coalitions of the Willing - Cooperative Marketing Strategies - examines group marketing of regional products.
6. Provenance in successful regional brands - examines businesses that have market leading brands and how they utilise the provenance of the brand.
7. Can regional food revive rural tourism? - examines the role of tourism in regional food consumption and branding.
8. Bloom where you are planted – reflects on the personal learnings of this study and how these have influenced our business.
9. Outcomes and where to from here – details the findings and recommendations of the study.

1. Common Themes of Successful Regional Brands

1. Identifiable geographic boundaries

The easier it is to identify the boundaries of a region, the easier it is for consumers to identify with the region. For this reason islands are often successful in creating brand identities.

Examples include Tasmania, King Island, Prince Edward Island, New Zealand.

Regions with well known or easily defined borders similarly can create an identity. Examples include Wales, Cornwall, Scotland and Switzerland.

Regions that form part of a greater land mass have a significant disadvantage compared to these regions.

2. Sense of common unity in residents

A common theme amongst successful regional brands is a low population base with relatively low levels of migration in or out of the region helping to create shared history, long family associations with the region that results in common values and beliefs.

The Celtic regions of Britain have maintained a separate sense of identity from the Anglo Saxons which is one of the features that assists Cornwall, Wales and Scotland with their regional brand identities.

Although there are 3 distinct language regions of Switzerland non membership of the European Union helps its people to identify themselves as “an island in the centre of Europe” which provides a distinct point of difference and sense of unity.



3. Alpine farm Emmental region of Switzerland

It is much easier to build a brand identity on values that are embraced by locals than to create an aspirational identity. Visitors to a region who have the brand values reinforced by the experiences of their stay develop belief and trust in the brand. Switzerland is a world leader here, brand values are demonstrated the minute visitors step off the plane and onto the train that delivers

them to the luggage collection area. As the train speeds away visitors are welcomed by “Heidi” and the closing sound of the presentation is the clanging of cow bells, a sound that echoes through the valleys and mountains of the country.

3. Champions

Modern consumers have been conditioned to be fashionable and their desires can be heavily influenced by influential people. Fashions however can be fickle good marketing needs to be directed at the influencers not the influenced therefore influential champions are an important component of successful regional brands.

a. Local Champions

Leaders of the communities and businesses within the region must champion the values of the region to encourage local people to endorse these values. Leaders at the highest level of government within the region need to be the both proactive and visible champions of the brand.

b. Celebrity Champions

The 21st century is sometimes referred to as the “Age of Celebrity”. Choice has become so extensive that consumers rely on well known personalities that they recognise and like to make choices for them. At no time in history has celebrity status been so enthusiastically embraced by society. Celebrities have enormous capacity to influence fashion. In food marketing the power of influence enjoyed by celebrity chef’s can change food markets overnight. When Jamie Oliver presented a series of television programs on caged hens in Britain sales of organic and free range chicken and eggs more than doubled and the caged hen industry was forced overnight into implementing radical change.

Successful regional brands have celebrity champions who endorse the region and the regions produce. Cornwall has resident celebrity chef Rick Stein, Tasmania has celebrity chef Tetsuya Wakuda, Wales has celebrity residents such as Tom Jones and Catherine Zetta Jones. Prince Edward Island has a fictional character Anne of Green Gables who first emerged 100 years ago but still represents the values and ideals of the island today.

4. Vibrant Arts Culture

Successful communities provide a rich texture of industry and people. They are communities that make strangers feel welcome and by supporting migration to the region, new business development and tourism they inculcate the existing values into the new arrivals. They are communities in which entrepreneurship flourishes, failure is tolerated and success celebrated.

An important thread that unites diversity in communities and supports difference is a strong and vibrant arts culture. Such a culture is evident in successful regional brands and is regularly incorporated into festivals that celebrate food and the arts.



4. Children's food art at the Abergavenny Food Festival Wales

5. Food Production Focus

A major component of regional identity is the produce and industry of the region. Successful regional brands all have agriculture as a significant component of their economy and identifiable products that are associated with the regional brand, for example;

Switzerland – chocolate and cheese

Cornwall – clotted cream, seafood

Wales – Welsh lamb

Scotland – Aberdeen Angus beef, Scotch whisky, shortbread

Prince Edward Island – potatoes, seafood

Tasmania – apples, cheese, seafood

Foods linked to the identified association can leverage off the regional identity far better than common foods. For example Cornish branded dairy products will sell better in London than Cornish branded mustard or shortbread which are not products people naturally associate with the region.

6. Tourism Icons

Tourism is a fundamental component of successful regional brands. People who experience the brand and its values first hand are likely to develop a strong loyalty to the brand.

Food rarely inspires travel but it is a core component of the tourism experience. People want to experience the local produce when they visit a region. Quality and availability of local produce are therefore important for the visitor experience accompanied by the service with which the produce is delivered.



5. Bio domes of the Eden Project in Cornwall

Successful regional brands often have tourism icons that drive visitor numbers. These icons are generally not related to food. Cornwall has the Eden Project which is often quoted as the “Eighth Wonder of the World”. Whilst the Eden Project is very much about plants and the growing of food it is the uniqueness of its bio domes, the diversity of plants and range of

experiences offered that draw people. Promotion of local food is a benefit of the experience. The relative isolation of Cornwall means that those visiting the Eden Project will stay a minimum of two nights significantly benefiting the local economy.

Tourism to Prince Edward Island has been driven for most of the past century by a fictional red headed girl called Anne of Green Gables. The character of Anne has influenced the childhood of millions of little girls around the globe including the author. Anne’s love of Prince Edward Island and its people are the brand values that still draw people to the island. Consuming homemade pie and local produce served by friendly locals is as much an expectation of that experience as home sewn quilts on farmhouse beds.

2. Products with Provenance

An August 2007 report compiled by Bidwells Agribusiness Consultants for the British Milk Development Board titled Dairy Products with Provenance has a number of findings that are relevant to Australian food businesses and regional development bodies.

1. Provenance means many different things to consumers – local product, proof of background/history, heritage, supporting small producers, organic, ethical, authenticity, taste. The Oxford Dictionary definition of provenance relates to the origin or history of a product.
2. Products marketed to the retail sector as having provenance tend to be sold by the retailer as premium products.
3. Evidence supports the theory that provenance is increasingly being used as an indicator of quality by British consumers. 54% of respondents to a 2006 IDG survey on Retail and Food Service Opportunities for Local and Regional Food purchased premium foods because they were perceived to be better quality.
4. One of the key recommendations of the report is that producers and distributors of food with provenance should place emphasis on promoting the specific attributes that provenance represents rather than the term provenance itself.
5. “There is evidence that marketing products with meaningful provenance attributes is a successful way of generating sales when other key purchase drivers (such as price, taste and convenience) are satisfied.
6. The top five factors influencing the purchase of dairy products in the UK are:
 - a. Taste (90%)
 - b. Quality (82%)
 - c. Price (80.5%)
 - d. Health (80%)
 - e. Convenience (79%)
7. Produced on the farm and Locally Produced food came in at only 51 and 50% respectively.
8. The British social demographic most likely to support local or regional provenance of food is affluent informed rural consumers. These people mostly live in rural towns or villages, are likely to be older/retired and come from the upper and middle classes.
9. The British social demographic most likely to support organic or fair trade provenance is affluent informed metropolitan consumers. These people are most likely to live in

cities and suburbs, are likely to be older/retired and come from the upper middle classes. The urban location of these people means they are unlikely to link food with the community and where it comes from.

10. Younger shoppers and price sensitive consumers are significantly less likely to use provenance in their purchasing decisions.

Relevance for Australian Producers

This research has a number of important findings for Australian producers of regional produce:

- a. Provenance is not the key driver of consumer purchasing decisions so should not be used as the primary marketing message or point of difference for products. Ensuring a product meets the needs of the consumer (convenience) and taste are more important attributes to drive sales. The role of provenance is to encourage the consumer toward purchasing the brand through appealing to consumer's values and aspirations.
- b. The demographic most likely to support regional provenance is affluent rural consumers who have an affinity with the region so focusing on selling to local consumers should be a priority.
- c. Affluent urban consumers are more likely to support regional provenance that is combined with values that appeal to them such as fair trade, environmental or animal welfare standards.

One of the major hurdles faced by regional food producers in Australia is the low population in rural Australia where the majority of the food is produced and consequently the even lower consumer base to whom regional or local produce has a natural appeal.

In developing regional produce marketing strategies consideration needs to be given to how to engage the target urban consumer with provenance messages that meet their expectations and values.

3. Regionality in Retailing

Regional identification of produce is used by retailers to market and promote products where retailers can identify an opportunity to increase sales and revenue. Regionality of produce is closely associated by retailers with localness. Major retail chains in the UK have capitalised on local sourcing to increase sales and revenue.

Products most closely promoted as having been locally sourced by UK retailers are fruit and vegetables, meat and eggs. Whilst the retail chains will claim to have up to hundreds of local farms supplying them with these products within the region, most produce will have entered the retail chain via a central distributor or hub.



6. Sainsbury campaign developed with supplier Greenvale AP to promote new potatoes in store

Marketing of local produce in UK retail stores has become a big focus in the fresh produce and meat sectors. An important component of the marketing campaign is real people and real stories. The faces of many farmers adorn point of sale marketing material, catalogue or print advertising and website information on local sourcing.

Supply of regionally produced manufactured products to UK retailers shows variation according to the region. Local sourcing of manufactured products tends to be greatest in regions with defined regional identities (such as Scotland and Wales). Sourcing of products with well known regional identities such as cheese tends to be higher at a regional level with local cheeses replacing national brands in some cases – Tesco's was due to replace in November 2008 the nationally branded Blacksticks Blue cheese in the South West region of England with Cornish Blue cheese because the buyer believed he could achieve greater sales with a locally branded blue cheese.

Tesco Local Choice

Tesco supermarkets have launched a localchoice™ brand for milk under their regional sourcing policy. Rather than developing a brand identity for each region as national dairy company Robert Wiseman Dairies have Tesco have opted for the simpler brand called localchoice™. The Tesco website defines localchoice™ milk as being “milk sourced from

smaller family run farms and sold at Tesco stores in, or close to, their county. It is produced to the highest animal welfare and environmental standards, as is our standard milk”.

By the end of 2008 localchoice™ milk was only available in all Metro, Superstores and Extra stores in England and Wales, with stores in Scotland and Northern Ireland planned to be added later in 2009.

One of the important factors driving sales for localchoice™ milk is the faith that Tesco customers have in the Tesco brand and belief in the claims of localness being made by the company for the milk.

Tesco Regional Sourcing

In an attempt to build the credibility of the local sourcing policy of the Tesco business the Tesco website provides considerable information on the local sourcing of products across the country. Many of the profiles for businesses and individuals featured on the website are the ones used at store level for promoting local produce.

The nation is divided into 11 defined regions and there are some distinct differences in the product sourcing from the different regions.

- All regions have a number of farmers supplying vegetables, fruit, eggs and meat. Supply will generally be through distribution centres or hubs
- Five regions have no local supply of manufactured foods or liquors listed – East Midlands, North East England, South East England, West Midlands, Yorkshire
- East England has 3 breweries and 2 branded manufactured food products listed
- South West England and Northern Ireland each have 5 manufactured food products listed
- The two regions with the highest numbers of regional brands listed are Wales (11 branded manufactured products and 1 distillery) and Scotland (21 branded manufactured products, 1 brewery and 1 distillery)



7. Local potatoes in Tesco's

Local Branding or Sourcing of Milk for Robert Wiseman Dairies

The Bidwells study for the British Milk Development Board titled Dairy Products with Provenance showed that the consumers most likely to purchase regional produce are more affluent rural consumers. There is also a recognised market advantage for regionally branded products in certain areas of Britain, principally the regions where there is a strong regional brand identity that links people to the region.

Robert Wiseman Dairies is an example of a National company who have successfully taken advantage of the local loyalty and developed very different regional sub branding strategies for their business with the aim of tapping into the higher proportion of consumers prepared to demonstrate local loyalties.

Robert Wiseman Dairies is the third largest milk processing company in Britain. The business has its origins in Scotland but today operates 7 liquid milk processing plants across Britain. The majority of milk processed by the company is for Supermarket own label with around 20% of the company's total milk sales being under the Robert Wiseman label which is a distinct black and white Friesian look. The company delivery vehicles and milk tankers are all branded with the Robert Wiseman Dairies colour scheme and are the most recognised milk vehicles in Britain.

In 2007 the company launched a new range of locally branded milk that now represents over 20% of the Robert Wiseman branded milk sales. These milks are specifically branded and targeted at the regions of Britain most likely to support regionally branded dairy products. Milk processed at the Aberdeen plant in Scotland is marketed locally within Scotland as Grampian Dairy milk, a name that has connection and appeal to Scottish people and does not draw on loyalty to either of the major cities of Glasgow and Edinburgh.

Milk processed at the new Bridgewater facility in Somerset is supplying the bulk of the English market. Locally branded milk from this plant is titled West Country Dairy. It is recognised by the company that the majority of counties in which this milk is sold – midlands and southern England have little or no regional allegiance to regional dairy products as they are not high dairy producing areas with little history of local production. The title of West Country Dairy provides a positive image as the south west is recognised as a major dairying region.

Milk processed in the Oakhampton plant in Devon for locally branded milk sales is titled Definitely Devon and is sold almost exclusively within the Devon County. This title reflects the company understands the loyalty in Devon to local dairy products.

Milk supplied from Cornwall can be segregated by the company at the Oakhampton plant for bottling under a Cornish Dairy brand. The company recognises that the people of Cornwall would not have allegiance to milk produced and marketed as being from Devon.

Welsh Lamb in Waitrose

Welsh lamb producers supplying Waitrose supermarkets are paid a premium worth 5% above the standard market value paid for British lamb (10% for organic Welsh lamb). The lamb is branded Welsh Lamb in Waitrose stores and is sold in Wales and surrounding English counties. A premium is charged to the consumer for this branded lamb. The Welsh farmers supplying Waitrose receive the premium for no other reason than the lamb is Welsh.

UK Retail Buyers Opinions on Regionality

Convenience Retailer (Co Op) – Mark Cloudy

- Consumers don't understand the difference between regional verses local
- Consumers support provenance if it comes at no extra cost
- Growth is in people wanting to be an informer – these people are heavily influenced by fashion. The age of celebrity means that magazine advertising influence is waning but celebrity endorsement has a massive impact on sales
- Problem for many products is that consumers don't know what to do with them.

High End Retailer (Waitrose) – Mark Himsworth

- Provenance is becoming much more important to the wider community in the sense of people wanting to know where their food comes from/how it is made. Support for provenance comes from knowledge of the roots to food and finding trust in the source



8. Premium cheese display in Waitrose

- Urban people are more promiscuous with regional loyalty and endorsement than rural people who have a real connection to local produce
- The average shopper is a provenance shopper one day/week (weekend). The rest of the week is convenience shopping
- Third party endorsement is important. People don't have knowledge but want to appear knowledgeable. Shoppers are promiscuous and have loyalty to fashion. They will support what is promoted to them as being the best. Taste is the only thing that will keep people loyal to a product
- PDO (Product of Designated Origin) has benefit to the manufacturer and retailer by providing status and credibility. It means very little to the consumer
- Even in a recession people will support quality food – it is the only treat they can afford.

Retailing in North America

Retailing in North America has a very different focus to that of the UK. The large size of the USA and Canada results in more complex distribution systems for retailers making regional sourcing more complex. A population base much like Australia that is urbanised and far removed from agriculture reduces the capacity for local loyalty to products.

The fact that small percentages of the population base lives in regions of food production means that promotion of local food in major retail chains has not really gained momentum. High end retailers such as Whole Foods have however embraced providence retailing very successfully.

- The business focus is on stocking only certified organic or traceable food products free of preservatives, GMO's, hormones. This is the primary provenance focus for all product sourcing
- Place of origin is not a focus for their consumer but having trust in the source is



9. Cheese Buyer Dayna at the cheese display in Whole Foods Market Seattle

- An audited system for proof of authenticity of products is essential for Whole Foods to achieve the brand values of the business and retain the trust of consumers
- Telling the story/history of a product is a good way to build trust with the consumer however to ignite the initial purchase of the product there must be a value add to the consumer to inspire them to purchase the product over something else.

Farmers Markets

Farmers markets are growing in popularity around the world. They provide a number of benefits to both producers and consumers:

- Enable producers to interact with consumers and gain direct feedback on products and packaging
- Enable producers to remove the distribution chain and supply direct to the consumer, reducing time from production/harvest to purchase
- Enable consumers to support local producers.



10. Farmers Market New York City

Visiting farmers markets in the UK, Canada, USA and Australia has shown a number of common themes amongst consumers who frequent the markets and the stall holders who retail in the markets.

- Consumers purchasing goods from farmers markets in urban areas are most likely to have high disposable incomes and are already provenance shoppers who seek fair trade and organic produce who see farmers markets as a way of supporting local producers
- Consumers purchasing goods from farmers markets in rural areas are most likely to be provenance shoppers who seek fair trade, organic and local produce. They come from a much more varied disposable income levels and value the social interaction of the market as much as the purchasing
- Many of the businesses selling in farmers markets are small with a limited capacity to grow or expand. Few businesses that commence selling within farmers markets appear

to grow and expand so they should not be viewed as likely stepping stones to grow businesses and brands.

Successful Farmers Markets

- The most successful farmers markets exist in regional areas where there are substantial proportions of consumers with high levels of disposable income and a sense of connection to the rural community that makes it desirable to purchase locally produced goods.
- Urban farmers markets work best on weekends when people are more inclined to provenance shop because they have more time.
- Rural and regional farmers markets are less constrained in the days they will succeed but work best when they incorporate a sheltered seating area for meeting over coffee and food.
- Successful producers selling at farmers markets provide a product range that meets the expectations and requirements of the market consumers. Presentation and packaging are important components of the display.
- Producers who focus on selling produce left over from other contracts rarely meet the expectations of consumers, often offer inferior produce and lower the brand identity of the market.
- An option for increasing the consumer reach of a farmers market in regions of low population base may be to take the market produce to consumers in the workplace in a box scheme type offering similar to that offered by Riverford Organics. Orders could be taken in the week leading up to the market for set prices. The orders would be fulfilled on the day of the market from stall holders and delivered to the work sites the following Monday. To succeed this would necessitate a cooperative approach from the stall holders and organisers of the market.

4. Culture is evolution not archaeology

Much of the food consumed in the world today has its origins in Europe. As people migrated from Europe to the new world over the past 500 years they have taken the traditional foods from their regions with them. In the new world the methods used to prepare these foods sometimes deviated from the origin because of a lack of similar facilities or ingredients and foods evolved. Similarly within the regions of origin foods evolved, as new inventions enabled the mechanisation of production at both a farm and processing level.

Today in Europe there is a growing movement to protect the original source of a wide variety of foods and limit the production and branding of these products to defined regions. Considerable funding has been provided by the European Union in recent years to assist in the protection of regional produce. Government support for such protection is seen as a means for protecting regional producers from competition and providing economic viability to maintain small farms and rural communities.

Some of the best known examples of regional appellation protection can be attributed to the European wine industry (Champaign, Burgundy), cheese (Stilton, Parmesan, Emmental) and smallgoods (Parma Ham).

Product of Designated Origin (PDO)

PDO status is the highest level of protection offered to regional produce. To gain PDO status the product must be manufactured within a designated region from raw ingredients largely sourced from the region. In the case of cheese the milk must be sourced from the region and for wine the grapes must have been grown within the region. The method used to produce the



11. Small regional Emmental cheese factory Switzerland

product is strictly specified but there is generally enough scope for individual producers to create slight variations in flavour or texture.

PDO status has been granted to a number of cheeses across Europe. In the course of this study two cheeses were looked at in detail – Stilton in England and Emmental in Switzerland.

There are six companies in England licensed to manufacture Stilton cheese ranging from substantially large processors producing thousands of tonnes per year to a small farm based manufacturer. All must source their milk (wherever possible) from within the designated territory, manufacture the cheese within the territory and follow a specified recipe which includes compulsory pasteurisation of the milk (a heat treatment to kill bacteria). All producers belong to the Stilton Association and pay a levy per tonnage produced to the association. Funding for the association is used for generic marketing activities, buy and retain registered trademarks in other countries for the Stilton brand, and to fund issues relating to food standards.

Great distress has been caused within the territory for Stilton manufacturers from a new cheese manufacturer starting within the territory producing a Stilton type cheese from raw (non pasteurised) milk. This cheese does not meet the Stilton standard because the milk is not pasteurised and is called Stickleton instead. The small volume of production and raw milk status provide a point of



12. Quenby Hall Stilton – Jane Bennett & Freddie de Lisle

difference for the market that is being rapidly applauded by food influencers (media and celebrities) as well as high end retailers such as Neil's Yard. There is little the Stilton manufacturers can do but watch. The strict rules of PDO status mean that they cannot compete with Stickleton on its key point of difference (raw milk).

Product of Geographic Indication (PGI)

The main difference between PDO and PGI status is that PGI products must be made within a specified region using specified methods or recipes but the ingredient components of the food may be sourced from outside the region.

The Melton Mowbray Pork Pie producers in Leicestershire in England are in the process of applying for PGI status for Pork Pies produced within the township and limited surrounding areas. To qualify for the status of a Melton Mowbray Pork Pie manufacturers must produce

pies using specified traditional methods (which include hand crimped pastry shells) and traditional ingredients (grey pork – cooked, rather than pink pork – cured).

The pork pie originated as luncheon snack for grooms to the hunts that gathered across the region. The pastry was a means of holding the meat together during the course of the day as the groom travelled with the hunt and was generally discarded before eating the meat. The



13. Dickenson & Morris Melton Mowbray Pork Pies

pork meat was sourced from pigs fed on the whey from the Stilton cheese also produced in the region.

Pork Pies have become a staple part of the British diet and can be found produced by pretty much every butchers shop across the country. The PGI status for Melton Mowbray Pork Pies will not require pork to be sourced from within the region which basically limits the point of difference for Melton Mowbray Pork Pies to the method of manufacture and the fact that they come from within the region.

To assist in the marketing of their message about Melton Mowbray being the home of the Pork Pie and to try to educate consumers about what differentiates a Melton Mowbray Pork Pie from any other Pork Pie the Association established to apply for the PGI status intend to develop a food festival in Melton Mowbray focused on the Pork Pie.

Implications of Protection

1. PDO or PGI status when used in conjunction with a trademark offer regional products legal protection from imitation products and misleading claims.
2. The same protective barriers that offer this protection may also limit opportunities for the included products and producers making them less able to respond to changing markets or to initiatives taken by competitors.
3. The heritage values of the provenance of PDO and PGI labelled products will ensure such products enjoy market sales beyond local regional markets. Their long term success in the broader market will always depend on their ongoing appeal to market influencers.
4. Just as society and culture evolve over time so do the tastes and desires of consumers. Food producers who can adapt their products and their processing techniques to meet the changing demands of market influencers will be the brand leaders of the future. People look to the future for inspiration and the past for reassurance.

5. Coalitions of the Willing - Cooperative Marketing Strategies

Red Tomato

Red Tomato is a non-profit organization, founded in 1996 by Michael Rozyne and based in Canton, Massachusetts USA. They view themselves as “a unique organization, with one foot in the mission-based non-profit world and the other in the market-based world of commerce”. Red Tomato’s mission is to connect farmers and consumers through marketing, trade, and education, and through a passionate belief that a family-farm, locally-based, ecological, fair trade food system is the way to a better tomato.

An unusual aspect of the organisation is the fact that funding for all research, market development and education work is supported by grants and donations from individuals, foundations, and government programs.

The trade work—buying, selling, and marketing of fresh produce to supermarkets and other customers—is supported by a small percentage of market-based prices. There is also a consulting arm of the business which provides service on a fee basis.

There are over 40 fruit and vegetable farmers supplying product into the network. All farmers are based in north eastern USA. Produce is marketed into retail and food service customers in the north east and mid-Atlantic USA. Retail customers include small individual independent stores, high end small retailers with several stores through to large retail chains including Trader Joes and Whole Foods. The network achieved sales exceeding US\$3 million in 2008.

The provenance on which products are sold is based on localness, ecological production methods and fair trade resulting in sustainable family farms.

Packaging is an important component of the brand identity for products and the primary location where the brand story is told. Individual farmers’ brands and stories are maintained on packaging with the Red Tomato logo included.

“Born and Raised Here” is the slogan used for products that are sold loose or have minimum packaging. The boxes, trays and bags used are standardised for size to reduce packaging costs and provide a uniform look for the products.

Red Tomato recognises that merchandising and handling of fresh produce can have a big impact on sales and consumer loyalty. To support their retail accounts, Red Tomato offers a variety of signage, banners, and brochures to help promote their produce and the farmers who grow it. Most are available free of charge to active accounts; some are provided at cost.

Prince Edward Island Food Trust

Prince Edward Island is the smallest province of Canada with a population of 132,000. It is located in the Gulf of St Lawrence and is connected to New Brunswick by a 14km bridge.

The Prince Edward Island Food Trust was a farmer led initiative to create a branded identity for produce from the island based on environmentally, economic and socially sustainable practices. The values of the brand were designed to underpin the integrity of the products sold under the brand whilst the focus for product development has been on providing added value to consumers.

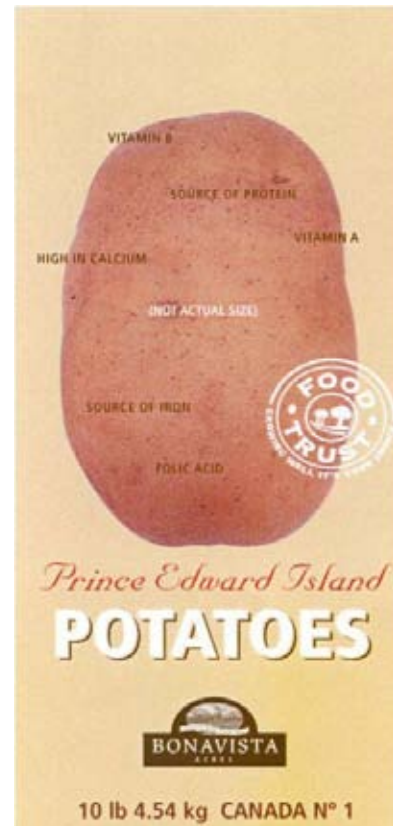
Funding for the Food Trust was provided by the Provincial Government – CAN\$5 million over 5 years. The Government had ownership of the brand and intellectual property pertaining to the brand and initially it was established as a not for profit organisation. A Government appointed board was established to manage the activities of the Food Trust.

The initial products taken to market by the Food Trust were potatoes presented with a number of consumer benefits;

- Refrigerated cabinet to extend shelf life and provide exclusive display for Food Trust products
- Grouping and branding into usage categories eg baking, mashing, frying
- Uniform size of potato to ensure uniform cooking time
- Packaging with cooking instructions.

New products developed under the brand included a range of pork products created to be high in omega 3 fatty acids and deemed healthier than conventional pork.

Unfortunately although the market opportunity was identified the project collapsed due to funding issues and a lack of adequate processing facilities.



14. Prince Edward Island Food Trust Potato Promotion

When the Provincial Government provided funding for the development of the Food Trust brand all farmers and potato pack houses were invited to participate in the project. However the strict standards set by the Food Trust in human resource management, land management and environmental controls led to only a few willing and enthusiastic farmers and 4 pack houses becoming involved. As potato sales grew in value and volume those that had chosen not to participate began to reflect on their decision.

One of the features of small populations is the significantly increased access the general population has to politicians and thus a greater capacity to influence Government. Due to this influence the decision was taken by the Provincial Government to take the Food Trust from a Not for Profit Government business to a private business. Before this could happen however a new Government came to power with differing objectives.



15. Prince Edward Island Food Trust poster depicting the values of the brand

Consequently the Prince Edward Island Food Trust was put out to tender and is now privately owned by a consortium of potato pack houses on the island that are not the original pack houses involved in the Food Trust development. The Board of Directors that drove the development of the Food Trust brand and championed its cause were stood down and are no longer involved.

There are many lessons to be learnt from the development and current situation of the PEI Food Trust;

- If Government invests public money into the development of a whole of region brand for products it must also provide leadership and guidance from the top. Ministers and departments heads will change and new people will not champion old projects unless they are seen to be of priority
- Leadership from the top will facilitate the necessary cooperation between agencies required to develop a holistic plan – agriculture, economic development and tourism
- Developing a local marketing strategy as a part of the brand is vital to building local support and value for the brand
- Credibility for a values based brand comes from having audited standards which can't be compromised
- Not all industry participants will willingly embrace the values of the brand. To succeed with a regional values based brand Governments must be prepared to work with the businesses that are willing to meet the requirements. Government must have the courage of its convictions as initial uptake of the program might be as low as 10-20% of the industry.

6. Provenance in Successful Regional Brands

Riverford Organics

Riverford Organics began as an organic family farm selling the vegetables produced on the farm through their own farm shop and major retail chains. The business changed almost overnight when owner Guy Watson returned from an unsatisfactory meeting with a Sainsbury buyer and informed the staff that they needed to find an alternative market for their produce as they would no longer be supplying retail supermarkets.

The response to this situation was the creation of a vegetable box scheme that has grown to sell over 42,000 boxes of organic produce a week across southern England through a franchising system. Boxes are delivered direct to people's homes and are ordered on line or via the phone.

The initial offer from Riverford was the farms own produce supplemented with locally grown organic vegetables and fruit from contracted growers. The offering has now grown to include imported organic produce, organic milk from the Watson family's organic dairy herd and locally produced organic cheese and yoghurt. Organic meat and a range of organic and free trade grocery lines have been added at the request of customers.



16. Riverford Farm Devon showing pack houses for box

The original provenance of the business was local organic produce. As the demand for the veggie boxes expanded franchises were set up to support organic producers in other regions. Today there are over 23 franchises of the business across Britain. The decision to include imported fruit and vegetables in the box scheme has attracted criticism however Riverford took the view that the highest priority had to be given to meeting their customer needs for a greater range of produce (banana's, citrus fruit, pineapples etc) that cannot be grown in Britain.

The business has evolved to meet the growing desires of customers to have a broader range of products included in the schemes home delivery service. The provenance of the brand has evolved from being “Local Devonshire Organic” to “An alternative shopping experience to supermarkets”. By allowing the provenance of the brand to evolve the business has been able to grow to meet the needs of an expanding base of consumers across Britain.

The values associated with being an organic family farm in Devon are still the underpinning values that the business is built on.

Dorset Cereals

Although bearing a significantly regional name the county of Dorset does not focus in the branding of Dorset Cereals. The business grew from a turnover of £5 million in 2003 to £35 million by 2008 through the rebranding of the companies range of breakfast cereals.

The most significant change was initially in the packaging which was moved to an attractive carton bearing a very natural look, subdued colouring, no pictures but windows in the box to show the product inside. The simplified box stands out on the shelf from competitors because of its natural uncluttered appearance.



17. Dorset Cereals packaging

Marketing of the cereals is undertaken through lifestyle shows and events rather than traditional food shows. Significant direct marketing to consumers is achieved through regular competitions promoted on the cartons where consumers can win gardening packs. Entry in the competition is done on line providing the business with an email address for future communication with the consumer. The business places a high priority on establishing a direct link with their customers and considers retail outlets as no more than a conduit that delivers their products to their customers.

A successful strategy of the business has been to become actively involved with gardening. Dorset Cereals is a regular participant in the Chelsea Flower Show and has won prizes for their displays. The business has more recently established a program in schools called Edible

Garden which assists teachers to plant out vegetable and fruit gardens within the school playground. Initially launched in Dorset schools the program has now been adopted nationally.

Consumer research conducted by Dorset Cereals has shown that a large percentage of their customer base assumes that Dorset Cereals products are all organic and the cereals and ingredients used by Dorset Cereals are sourced from within Dorset or within 100 miles of the business. Nowhere in its marketing or information does the business mention where products are sourced (it can be globally). There are a range of organic cereals included in the product offer but not all the range is organic nor claims to be.

The clearly successful marketing strategy of appealing to lifestyle aspirations of consumers has resulted in the provenance of Dorset Cereals being a wholesome product range that is trusted to be good for you and the environment. It is an aspirational brand that is all about lifestyle, leisure time, dreaming of a house in the country and growing a garden.

Export markets for the business are focused on locations where British people go on holidays (Majorca, Southern Spain etc). It is the reverse of most regional brands that are introduced to consumers when holidaying in the region and attract loyalty when people return home by providing positive memories of the time spent in the region.

Breakfast is often the only meal people “eat in” when holidaying and finding a recognised and trustworthy brand of breakfast cereal from home attracts consumers who might not normally purchase the product if they saw it in their local supermarket. Once the association with the brand is made there is the opportunity to develop brand loyalty with the brand providing positive association with holiday memories.

Anne’s PEI Farm



Raymond Loo is an organic farmer from Prince Edward Island who went on a trip to Japan to identify potential markets for his own and other organic products from the island. Once in Japan he discovered that whilst only 5% of Japanese people had heard of Prince Edward Island, 95% of people over 30 years of age had heard of Anne of Green Gables because the book had been part of the English language curriculum in Japan for many years.

18. Raymond Loo of Anne’s PEI Farm with a copy of ANA Gift Catalogue showing a front cover of Green Gables house on Prince Edward Island

To capitalise on the opportunity created by this awareness of a fictional literary character from Prince Edward Island Raymond and his Japanese business associates set about identifying potential products from the island that would appeal to the Japanese consumers.

Anne's PEI Farm is the brand given to the jams they now sell in Japan produced from locally grown PEI organic fruit. Other products that have been included in the Anne's PEI Farm product range include fruit teas, dandelion coffee and non GMO canola. The business has built to over CAN\$3 million in sales.



19. Anne's PEI Farm jam gift boxed for the Japanese market

The major market for these products is in the gift catalogues of major airline/tour companies ANA and JAL. These companies create gift catalogues which link the products offered to the touring destinations. People can buy the gifts related to their touring destination from the catalogue and have them delivered to their home, saving on having to carry souvenirs from the tour home.

A good example of the success of this marketing channel is the first year ANA offered Californian cherries in the catalogue and tours to California to see the cherry harvest they sold 25,000kg of cherries through the catalogue.

PEI is a touring destination for many Japanese who have a primary focus on experiencing the tourist attractions related to Anne of Green Gables. The aim of Raymond and his business partners is to build on this association by clearly linking the produce of the island with the experience.

The initial Anne association for Japanese centres on location. The challenge for Raymond and his associates is to extend the association to include quality. Currently all the fruit suppliers for the Anne's PEI Farm jam are organically certified so the jam can carry an organic underpinning standard. Other products that have market potential such as non GMO canola oil will not necessarily carry the standard of organic but do need to continue to reinforce a high quality standard and provide traceability.

7. Can Regional Food Revive Rural Tourism?

Attending a conference attached to the Abergavenny Food Festival in Wales in September 2008 titled “Can regional food revive rural tourism” provided significant inspiration for exploring the role of tourism in regional food branding.

Food, although rarely the driving factor in the choice of tourism destinations is a fundamental component of a tourism experience. For visitors to rural and regional areas locally produced food is a desirable component of the experience of the region. Rural and regional tourism



20. Abergavenny Food Festival in Wales attracts 20,000

operators often complain about the difficulty in exposing visitors to local foods that will meet their expectations and enhance the tourism experience.

Improving the food experience for visitors to rural and regional areas requires careful planning and cooperation and coordination of all those involved:

- Food producers must provide access to the food products for local food service providers and ensure adequate information is available to effectively promote the provenance of the food
- Food service providers need to effectively source regional food and ensure that information regarding the provenance of the brands is available on menu boards and front of house staff are knowledgeable about the local products they are serving
- Independent retail outlets and Farm Shops need to team with local food products to improve the introductory experience of the products and brands for visitors
- Tourism bodies can improve visitor experiences and encourage extra overnight stays by developing and marketing food and drink trails to guide visitors to suitable local producers, retailers and food service providers. Guidelines for eligibility for inclusion need to be well defined and considered

- Government can assist by providing funding to improve access to local products (this is particularly an issue for small producers), provide training for food service industry staff including training in local product knowledge; develop marketing material to promote food trails around suitable venues supplying or serving local produce; and to develop and provide consistent signage for food trails.

A successful example in Cornwall

The premier tourist attraction of Cornwall is the Eden Project, an enormous garden built in a disused quarry that includes bio domes to house Tropic and Mediterranean climate plants. The Eden Project claims to house every plant in the world that is useful to humans. A visit to the Eden Project inspires closeness to nature and a desire to go home and plant a garden. A feature of the food products available for consumption on site and available for retail sale is the local sourcing. The story of most products is included at point of sale.



21. Outside gardens looking to bio domes of the Eden Project



22. Food displays at the Eden Project Cornwall

The theme of local sourcing is continued in the vast majority of pubs and restaurants within Cornwall with each menu item that is locally sourced identifying the producer or brand for the major ingredients. It is a badge of pride worn by businesses supporting other local businesses. In the better restaurants and pubs the staff are knowledgeable about the products and their stories.

Cornwall is home to celebrity chef Rick Stein who owns a range of restaurants in Padstow offering a seafood experience for all budgets. Enhancing the seafood experience Rick also offers a cooking school teaching people how to cook seafood.

The strong links between tourism in Cornwall and local food production is one of the primary reasons that produce branded as originating from Cornwall sells well in London and the affluent commuter regions surrounding London. Cornwall is a fashionable travel destination for upper and middle class people from these areas. The Cornish regional food experience which includes the product experience as well as the freely available product knowledge (both provenance and usage) contributes significantly to the ongoing brand loyalty engendered by Cornwall.

Farm Shops

Farm shops provide the ultimate opportunity to link regional produce to a tourism experience. Unfortunately many farm shops are seen by the owners as being no more than a way of generating extra farm income and consequently fail to capitalise on the brand building opportunity



23. Farrington's Farm Shop in Somerset England

by being informative and educational experiences. Visitors who are provided with information on the provenance and usage of a product often become enthusiasts using the products themselves and strongly influence others in their social circle.

Successful farm shops or regional food brand outlets exhibit a number of common characteristics

1. They provide an interactive experience, often where visitors can see products being made, pick their own or touch the animals, examples being;

a. Dalesford Farm Shop in Gloucestershire

UK provides viewing access into the cheese cellars where the farm produced cheese is maturing. They also have extensive gardens that inspire purchases from the garden supply shop.

b. Ludlow Food Centre in Shropshire UK has a viewing window into each of the different production rooms for the many products manufactured on site.



24. Ludlow Food Centre window looking into the dairy processing area

- c. Alpenrose Dairy in Oregon USA has an entire Wild West style village built on site that incorporates a cow barn, milking dairy, pony rides and ice cream parlour.
 - d. Forest Hall Farm Shop in Maryland USA offer pick your own fruit and vegetable options.
 - e. Wensleydale Creamery in Yorkshire UK offers a film of the cheese making process, viewing windows into the cheesemaking rooms and information boards on the cheese making experience.
 - f. Beeches Cheese in Seattle USA offers viewing windows in the shop and from the street to observe the cheese making.
2. Provide experience of the product on site.
- a. Dalesford & Chatsworth Farm Shops incorporate restaurants in the shop complex that features food from the retail shop.
 - b. Wensleydale Creamery offers an onsite restaurant featuring cheese products and tasting samples.
 - c. Beeches Cheese Shop offers simple meals based on the cheeses produced which include toasted sandwiches, Macaroni Cheese and tasting samples of the cheese varieties.
3. Establish “hero products” that are either the brand of the farm shop business or are brands that the shop represents. These are the products that provide a point of differentiation and separate the individual farm shop from just another shopping experience. For example;
- a. The Well Hung Butcher’s Shop in Aberdeenshire UK features locally sourced meat with the signature product Aberdeen Angus Beef having been hung for up to 6 weeks prior to sale.
 - b. Alvis Farm Shop in North Somerset features Lye Cross Farm cheese products that are made on the farm.
 - c. Chatsworth Farm Shop, Dalesford Farm Shop and Darts Farm Shop in Devon UK all have extensive product ranges produced exclusively for their farm shops and sold under the farm shop branding.
 - d. Riverford Organic Farm Shop in Devon UK offers locally produced organic fruit, vegetables, meat and dairy products as well as internationally sourced organic grocery lines.

4. Place great emphasis on educating visitors on the provenance of the products and their usage. For example;

a. Dalesford Farm Shop provides information cards on the animal husbandry practices used for all its branded meat products and a recipe card for each product.



25. Daylesford Organic Lamb Burger Packaging

b. Wensleydale Creamery offers product leaflets describing the flavours and textures in each cheese variety.

5. Offer a deeper educational experience that is user paid. For example;

- a. Dalesford Farm Shop run regular cooking classes using produce from the shop.
- b. Alpenrose Dairy and Forest Hall Farm Shop offer extensive educational programs for school children about local agricultural systems of production and food production methods.

Taste Marketing

Many regions produce a local brochure promoting local food produced in the region and where to sample it. Unfortunately in an effort to satisfy multiple objectives some try to be a guide to local producers, a restaurant guide, a local map, a tourist guide, carry advertisements for local producers and act as a business to business promotional guide. The result is confusion, clutter and mixed messages. To maximise value and minimise confusion for visitors' publications need to be kept simple, with one or two objectives at most being satisfied. Those who have been successful in achieving good publications concentrate on the following;

1. A publication intended as a guide for tourists and visitors should only include businesses that are open to the public. Businesses that open by appointment serve only to confuse visitors, complicate the message, and are not primarily focused on providing a visitor experience.
2. To cater for the variety of needs of visitors, guides for regional foods should include listings for producers that open to the public, local independent retailers providing service for regional produce, restaurants and food service outlets that feature regional produce.

3. In small regional areas linking regional food guides with regional arts is a positive way to create critical mass for inspiring visitors into regions. In the same way that only food producers open to the public should be included, only creative artists with studio's open to the public should be included along with galleries that feature local art and crafts.
4. Businesses included in a regional food visitor guide must meet minimum tourism standard accreditation before being included in the publication. Standards set by tourism authorities need not be arduous however they will ensure the experience offered by the operator is consistent and meets the expectations of visitors.

8. Bloom where you are planted

A central theme of this Nuffield study is the importance of recognising and valuing the local region in which a food business is run and the importance of building and maintaining local community support for the business. As a result of what I have learnt from my Nuffield travels we have undertaken a number of activities within the Ashgrove business to enhance our brand and product range and to strengthen our community and regional ties.

Tourism

Within our own retail shop we have implemented a number of simple changes to increase the understanding of our brand and what makes our products special, including;

- Producing a new film of the business focusing on the people, product and place of our business from farm to finished product that runs continuously in the tourism facilities. This replaces a film that taught people how to make cheese
- New brochures on the milk products and cheese range providing information on what makes our products special and how to use them
- Implementation of an expanded cafe menu utilising Ashgrove products and products sold in the retail shop.

We have started working closely with tourism operators to provide ready to serve cheese and food options for their guests. This enhances the experience for the visitor and provides a positive memory of the food brand. Businesses we are working with include Forestry Tasmania Tourism Experiences, cruise boats and tour operators.

Arts in the Community

Building on the theme that arts are a fundamental component of successful regional communities and the need for regional businesses to be seen as supporting and giving back to the local community Ashgrove Cheese is sponsoring school based arts programs with dairy themes;

- 2008 Cow Art involved 21 Primary and High Schools painting life sized fibreglass cows which are now on display around the Ashgrove site.



26. Hagley Farm Primary School's "Picowso" Art

- 2009 Gumboot Art is involving over 50 Primary Schools painting gumboots which were displayed at Agfest (a Tasmanian agricultural field days) in May after which they were auctioned for charity.

Regional Partnerships

We have begun working with another local food producer to develop joint products and marketing opportunities. The other business is an on farm poultry processor with very similar business values to our own. The first joint product, a chicken and cheese kransky was launched at a local food festival in March 2009. The new product enhances the capacity for both businesses to participate in food festivals by providing hot food to serve and provides access to a different area of the retail sector.

In addition to working on new products the businesses are cooperating to address transport and logistics problems, and to develop energy efficient waste management strategies.

Retail Opportunities

There are two businesses visited on this study that stand out for their excellence in packaging and marketing strategies – Dorset Cereals and Kelly’s Bronze Turkeys. As a result of visiting these businesses Ashgrove has undertaken a complete repackaging of the Ashgrove Cheese offer to retail customers. The new packaging was rolled out in May 2009. In addition to the new packaging two new products were launched which are focused on providing added value to the consumer.



27. New Ashgrove Retail Packaging



28. Ashgrove Cheesy Cow Box

The credibility engendered by this Nuffield Scholarship has given Ashgrove Cheese the opportunity to work with the Woolworths retail chain to provide an additional range of 6 products into the Tasmanian Woolworths stores. These products will be ranged from May 2009. The buyer is willing to increase the ranging for Tasmania on the strength of the sales history of Ashgrove products which show sales rates up to 6 times higher for Tasmanian stores than those of other states.

9. Outcomes and where to from here

An unexpected outcome of this study was the discovery that the work being done in Tasmania to develop the Tasmanian brand is good and in many areas ahead of regions visited in the study. The area that Tasmania has the greatest work to do is in focusing on the local market to both increase sales of products within the region and to increase the understanding locally of the brand values of Tasmania.

The findings and recommendations of this report have relevance to a number of stakeholders in industry and government for all food producing regions within Australia including;

- Individual businesses looking to utilise regionality to enhance the marketing of their brand
- Industry groups looking to add value to produce through regional identification in the market place
- Governments looking to grow or value add to the agricultural and food industries in their region
- Governments and industry looking to grow tourism in regional Australia.

Findings

Major Findings

- The intended end use is the key driver of most purchasing decisions. Provenance underpins the values of the product or brand and is an attribute that may influence the purchasing decision. Regionality is an aspect of provenance that is most likely to influence purchasing decisions when the product is local or the region is well known for the product.
- The role of government in the development of a regional brand identity is to; identify an overarching set of values that represent the region, ensure all sectors of government incorporate those values in the strategic planning and promotion of their respective sectors, and to assist industry in the generic marketing and promotion of the region and its produce
- The role if industry in the development of a regional brand identity is to marry the values of the region to those of the business brand to enhance the integrity of the

provenance of the products. It is the responsibility of each business to market and promote its own brand and products.

Findings

1. Regions that are able to develop brand identities that are recognised outside the region in national and international markets have a number of common elements:
 - a. Identifiable geographic boundaries
 - b. Sense of unity in residents
 - c. Champions – both local and celebrity
 - d. Vibrant Arts Culture
 - e. Food and Agricultural Focus
 - f. Strong Tourism Focus
2. There are opportunities to increase the range of regional products at local level in Australian retail chains through the development of relationships that benefit both producers and retailers.
3. Creating legal frameworks for defining regional products such as Product of Designated Origin offer protection for the products included but may also create limitations for businesses and brands.
4. Cooperative marketing of regional produce works well when the values and vision is shared by all participants.
5. Successful brands of regional origin concentrate on the distinguishing attributes of the product. These attributes are reflected in the values of the region and reinforce the brand.
6. Local food is a fundamental component of regional tourism experiences.

Recommendations

Regional Brand Development

1. When developing regional brand strategies for food the industry sectors that need to be involved in the consultation and development include; agriculture, fishing, aquaculture, tourism and regional arts. The Government sectors that need to be involved include; economic development, agriculture, fisheries, arts and tourism.
2. In Australia developing whole of State strategies for regional foods reinforces the power of the brand with consumers and assists in building awareness and loyalty.

This strategy need not preclude and can complement the development of sub regional strategies for well known products, for example, wine.

3. In developing a brand identity for a region it is important that the values and aspirations of the brand match those of the people, Government and businesses found within the region.
 - a. The person holding the highest office of government within the region must champion the brand and ensure the values of the brand are reflected in the activities of every sector of government
 - b. Every person living within the region has the potential to be a champion of the brand, provided they understand what the brand stands for and therefore they need to be educated in the values that underpin the brand
 - c. Marketing of the regional brand outside the region should initially be focused on locations that attract high numbers of visitors to the region
4. In developing regional produce marketing strategies consideration needs to be given to how to engage the target urban consumer with provenance messages that meet their expectations and values.

Tourism

Development of a regional food strategy must incorporate relevant elements of tourism to capitalise on the marketing opportunities for regional food;

1. Local food is a fundamental component of a regional tourism experience. To maximise the positive nature of such an experience for visitors cooperation must be achieved between regional food producers, regional food service providers, local independent retailers, tourism bodies, and government. Promotion of regional tourism needs to incorporate food as a core component of the tourism experience. Businesses that meet the desired criteria for a positive experience of regional food should be encouraged through inclusion within tourism publications and accreditation schemes.
2. Regional food producers in conjunction with tourism bodies and Government should work actively to build capacity with food service and retail businesses to enhance the regional food experience for visitors.
3. To encourage continuous improvement in the sector awards recognising excellence in food tourism should be included in either tourism award programs or regional business award programs.

4. Visitor Guide's to Regional Food and Wine should be designed to provide an informative and educational experience for visitors:
 - a. Include only food producers with selling centres to the public.
 - b. Include restaurants and food service outlets that meet tourism accreditation standards.
 - c. Include retail outlets that feature local regional produce.
 - d. Include regional arts and craft under the same guidelines as food businesses to boost the offering of regional trails and create viable travel routes for visitors.

Opportunities in Retail for Australian Regional Producers

1. In assessing whether to stock regional produce Australian retailers make judgements based on sales rates and return on shelf space, decisions are solely commercially based and no consideration is given to assisting a region or building a brand. It is therefore important to collect and have available hard data to reinforce marketing proposals.
2. It will also add weight to the proposal to provide the retailer with the story behind the product however this story must relate to the marketing strategy of the retailer.
3. To successfully pitch regional products to retailers suppliers must be able to demonstrate:
 - a. The products on offer have a local support base in the stores proposed for the ranging. Sales rates in independent stores or urban farmers markets are relevant data for demonstrating local support.
 - b. That the supply of the products on offer will meet the demand for sales. Low or out of stock periods, particularly soon after launch will quickly erode the retailers confidence in the product(s).
 - c. The products on offer will meet the quality standards and expectations of consumers and the retailer for production, packaging and presentation.
4. Small regional producers looking to supply major retail chains with products on a regional basis are more likely to achieve results when they link with existing vendors (suppliers) to deliver products. Retail buyers will have more confidence in new products offered through existing supply chains.
5. Sales for regional products outside of the local region will rely more on product appeal than on provenance. Proposals for products to be marketed outside the local region need to clearly articulate the products point of difference and capacity to appeal to consumers nationally.

6. Unless consumers can be convinced to buy local produce, Australian retailers are unlikely to adopt the sophisticated “local” marketing strategies of the UK retailers.

Cooperative Marketing

1. In providing funding to cooperative marketing schemes for regional foods
Governments must recognise that successful systems will not incorporate all businesses from an industry sector. Successful operations will emerge from groups with common values and aspirations who are prepared to meet high standards.
2. Funding provided in grant form is more constructive than Government retaining ownership.
3. When developing strategies to enable small regional producers to service markets for their products it is critical that strategies be developed to allow businesses to tap into existing larger business supply chains and distribution methods.

Appendix 1. Meetings and Interviews

United Kingdom

Greenfields Farm Shop - Rob Ward Nuffield Scholar 2008

Station Road, Donnington, Telford TF2 8JY

Colston Basset Stilton Cheese

Harby Lane, Colston Basset, Nottinghamshire NG12 3FN

Quenby Hall Stilton Cheese – Freddy de Lisle, Owner,

Hungarton, Leicestershire LE7 9JF

Dickenson & Morris Mr Stephen Hallam, Managing Director

Ye Olde Pork Pie Shoppe, 8-10 Nottingham St, Melton Mowbray, Leicestershire LE13 1NW

Dorset Cereals -Harriet McKay, Communications Manager, Phil Hiscutt UK Business

Development Manager

Peverell Avenue East, Poundbury, Dorchester, Dorset DT1 3WE

Alvis Bros - John Alvis Nuffield Scholar 1983 Managing Director

Regilbury Park Farm, Benches Lane, Winford, Bristol BS40 8BE

Paxton & Whitfield - Jeremy Bowen Sales Manager

Unit 6 Willow Court, Bourton Industrial Estate, Bourton on the Water,

Gloucestershire GL54 2HQ

Waitrose - Mark Himsworth Product Manager, Food Hall Brand Development & Innovation

Bracknell, Berkshire RG12 8YA

Daylesford Organic - Paul Collins Executive Chef

Daylesford Organic Farm Shop, Daylesford, near Kirkham, Gloucestershire GL56 0YG

Tesco - Sarah Mackie, Nuffield Scholar 1996 Senior Buying Manager Scotland

Balquhindachy, Methlick, Ellon, Aberdeenshire AB41 7BY

Bidwells - Richard Walters Head of Food Marketing

Trumpington Road, Cambridge CB2 9LD

Dunhumby Academy of Consumer Research - Andy Fearne

Kent Business School, University of Kent

Cornish Cheese Company - Phillip Stansfield

Cheesewring Dairy, Knowle Farm, Upton Cross, Liskeard, Cornwall PL14 5BG

Trewithen Dairy - Bill Clarke

Greymare Farm, Lostwithier, Cornwall PL22 0LW

Robert Wiseman Dairies - Sandy Wilkie Sales & Marketing Director

159 Glasgow Road, East Kilbride, Glasgow G74 4PA

Co Op - Mark Cloudy Cheese Buyer

New Century House, Manchester, M60 4ES

Taste of the West - John Sheaves Chief Executive

Agriculture House, Pynes Hill, Rydon Lane, Exeter, Devon EX2 5ST

Sarah Long Nuffield Farming Scholar 2007

55 Simons Walk, Pattishall, Towcester, Northants NN12 8NX

Real Food Festival - Rebecca Sullivan Brand Events

Earls Court Exhibition Centre, Warwick Road, London SW5 9TA

Levercliff - Barry Green Director

Gwenfro 13, Wrexham Technology Park, Wrexham LL13 7YP

Christine Hope Nuffield Scholar 2006

Tan House Farm, Longtown, Hereford, Herefordshire HR2 0LT

Kelly's Turkeys - Paul Kelly Nuffield Scholar 2007

Springate Farm, Bicknacre Road, Danbury, Essex CM3 4EP

Michael Giffin Nuffield Scholar 2006

West Laing, Horsham Road, Rusper, West Sussex RH12 4QX

Quicke's Traditional Cheese - Mary Quicke Managing Director

Home Farm, Newton St Cyres, Exeter, Devon ZE5 5AY

Riverford Organics - John Richards, Farm Manager, **Laura Morris**, Marketing
Wash Barn, Buckfastleigh, Devon TQ11 0LD

Nick Davis – Nuffield Scholar 2008

Esgairdranllwyn, Llaithddu, Llandrindod Wells, Powys, LD1 6YS Wales

Greenvale AP – Angela Cliffe

6 Avaline Court, Cotford St Luke, Somerset, TA4 1JB

Switzerland

Langacker Cheese Factory - Adrian Langacker Cheesemaker

Rueggisberg, Switzerland

Farmers – Walter, MArgritt & Adrian Von Niederhausen

Eichmatt, 3155 Helgisried, Switzerland

New Zealand

Meat & Wool New Zealand - Scott Champion General Manager, Market Access & Services

Level 13, PWC Tower, 113-119 The Terrace, Wellington 6140

USA

University of Maryland

Harry R Hughes Centre for Agro Ecology Inc

Sarah Taylor-Rogers Assistant Director

Wye Research & Education Centre, PO Box 169, Queenstown, Maryland 21658

Southern Maryland Agricultural Development Commission

Christine Bergmark Executive Director

Tri-County Council for Southern Maryland, PO Box 745, Hughesville, Maryland 20637

Whole Foods Seattle – Dayna Cheese Buyer

1026 NE 64th St, Seattle Washington State 98115

Beechers Cheese

Pikes Pier, Seattle, Washington State

Alpenrose Dairy

6149 SW Shattuck Road, Portland , Oregon OR 97221-10044

China

Australian Style - Ben Quin, Director

2-4 Building 7, Shenjingyuan Eastern District 528430

Canada

Barry Cudmore Nuffield Scholar 2004

Charlottetown RR9, Brackly Beach, Prince Edward Island C1E 1Z3, Canada

Anne's PEI Farm – Raymond Loo

Kensington RR#6, Prince Edward Island, C0B 1M0, Canada

Prince Edward Island Food Trust Former Executive Staff – Scott Jay & Alan

Charlottetown, Prince Edward Island, Canada

BioAlliance – Rory Francis, Executive Director

National Bank Tower, 134 Kent St, Suite 405, Charlottetown, PEI Canada C1A 8R8

The Agromart Group – Andrew Robinson, General Manager, **Mary Roberts**

Travellers Rest, PEI, Canada C0B 1A0

Mi'kmaq – Alan Baker, Commercial Fisheries Liaison Coordinator

70 Kent St, Charlottetown, PEI C1A 1M9

Tony's Meats – Frazer Hunter, Director

RR#4 Antigonish, Nova Scotia, B2G 2I2, Canada

Vita Bite Melvin Farms – Richard Melvin, Nuffield Scholar 1982 Director

RR#2 Canning, Nova Scotia B0P 1H0, Canada

Foxhill Cheese House

1660 Lower Church St, Port Williams, Nova Scotia, Canada

Riverview Herbs – Jim Bruce, Farmer

PO Box 92, Maitland, Hants Co, Nova Scotia, B0N 1T0, Canada

Plain English Compendium Summary

Project Title:	The Role of Regionality in the Marketing and Branding of Food
Nuffield Australia Project No.: Scholar:	Jane Bennett
Organisation:	Ashgrove Cheese Pty Ltd
Phone:	03 6368 1105
Fax:	03 6368 1490
Email:	jane@ashgrovecheese.com.au
Objectives	To look at how regions of the world utilise regionality to market and sell food and understand what drives consumer purchasing in relation to the origin of their food.
Background	<p>Experience over the past few years through running a regionally based food business and involvement with State and National Food Industry Councils and the Brand Tasmania Council has heightened my awareness of regional branding and increased my desire to better understand the components of regionality that are valued by consumers and why.</p> <p>Every agricultural industry sector strategic plan I see for Tasmania and other States has a component relating to value adding or moving away from dependence on commodity markets through differentiated marketing and branding.</p>
Research	Investigating this topic has involved visiting farmers, food manufacturers, food retailers, cooperative marketing bodies and a range of Government agencies in Europe, North America and Asia. It has also involved participation in and attendance at food marketing related conferences, festivals and trade shows.
Outcomes	The most important finding of this report is the recognition that the most successful way to add value to products is to provide a convenience to consumers which is backed up by meeting the price and taste expectations of the consumer. Regionality is an attribute of provenance that can be used to underpin the values of the product.
Implications	Regional produce marketing strategies need to focus on the local market first before attempting to engage external markets. Attempts to market regional produce outside the region need to focus on the intended market and what the market is seeking from provenance of products. Markets that value provenance are generally seeking verification of the provenance claims which means that the provenance of organic or certified systems of production will be more highly prized than regionality.
Publications	