General enquiries on this form should be made to:
Defra, Science Directorate, Management Support and Finance Team,
Telephone No. 020 7238 1612
E-mail: research.competitions@defra.gsi.gov.uk

SID 5 Research Project Final Report

- **Note**
  In line with the Freedom of Information Act 2000, Defra aims to place the results of its completed research projects in the public domain wherever possible. The SID 5 (Research Project Final Report) is designed to capture the information on the results and outputs of Defra-funded research in a format that is easily publishable through the Defra website. A SID 5 must be completed for all projects.
- This form is in Word format and the boxes may be expanded or reduced, as appropriate.
- **ACCESS TO INFORMATION**
  The information collected on this form will be stored electronically and may be sent to any part of Defra, or to individual researchers or organisations outside Defra for the purposes of reviewing the project. Defra may also disclose the information to any outside organisation acting as an agent authorised by Defra to process final research reports on its behalf. Defra intends to publish this form on its website, unless there are strong reasons not to, which fully comply with exemptions under the Environmental Information Regulations or the Freedom of Information Act 2000.
  Defra may be required to release information, including personal data and commercial information, on request under the Environmental Information Regulations or the Freedom of Information Act 2000. However, Defra will not permit any unwarranted breach of confidentiality or act in contravention of its obligations under the Data Protection Act 1998. Defra or its appointed agents may use the name, address or other details on your form to contact you in connection with occasional customer research aimed at improving the processes through which Defra works with its contractors.

Project identification

1. Defra Project code: FO0312
2. Project title:
   Understanding of Consumer Attitudes and Actual Purchasing Behaviour with Reference to Local and Regional Foods
3. Contractor organisation(s):
   SERIO (Formerly SRRU)
   University of Plymouth
   16 Portland Villas
   Drake Circus
   Plymouth
   PL4 8AA
4. Total Defra project costs (agreed fixed price): £ 135,379
5. Project: start date................. 01 June 2007
   end date.................. 31 May 2008

6. It is Defra's intention to publish this form.
Please confirm your agreement to do so. .... **YES** ☒ **NO** ☐

(a) When preparing SID 5s contractors should bear in mind that Defra intends that they be made public. They should be written in a clear and concise manner and represent a full account of the research project which someone not closely associated with the project can follow.
Defra recognises that in a small minority of cases there may be information, such as intellectual property or commercially confidential data, used in or generated by the research project, which should not be disclosed. In these cases, such information should be detailed in a separate annex (not to be published) so that the SID 5 can be placed in the public domain. Where it is impossible to complete the Final Report without including references to any sensitive or confidential data, the information should be included and section (b) completed. NB: only in exceptional circumstances will Defra expect contractors to give a "No" answer.
In all cases, reasons for withholding information must be fully in line with exemptions under the Environmental Information Regulations or the Freedom of Information Act 2000.

(b) If you have answered NO, please explain why the Final report should not be released into public domain

Executive Summary

7. The executive summary must not exceed 2 sides in total of A4 and should be understandable to the intelligent non-scientist. It should cover the main objectives, methods and findings of the research, together with any other significant events and options for new work.

- The Socio-economic Research and Intelligence Observatory (SERIO), formerly the Social Research & Regeneration Unit (SRRU), in collaboration with the University of Plymouth's Agrifood Centre (AfC), Rural Futures Unit and Small Business and Services Research Unit, was commissioned by Defra in April 2007 to undertake research to further understand consumer attitudes and actual purchasing behaviour, with reference to local and regional foods.
- The overall aim of this project is to contribute to the knowledge and understanding of the factors influencing consumers' attitudes and behaviours in the market for local and regional foods in England. Within this the research has four main objectives:
    - To characterise and evaluate the local and regional food industry in England, from the point of view of household and trade buyers;
    - To understand the factors influencing purchasing decisions and to assess their relative importance in decision making;
    - To identify and synthesise sources of data relating to the consumption and marketing of local and regional foods; and,
    - To inform future commercial and public policies in the local and regional food sector.
- The study employed an integrative research framework, incorporating both primary and secondary research. Using a sequential approach, quantitative statistical survey research has been based upon secondary research and grounded qualitative understanding of respondents' motivations, perceptions, attitudes and behaviours.

- The first phase of research combined a desk based investigation of secondary sources with discussions with industry experts in order to contextualise the study and enable any relevant linkages to be identified. Insights from this element helped to shape the subsequent fieldwork. The second phase consisted of primary qualitative research, both with consumers and trade organisations. These elements then assisted in the development of the primary quantitative research which consisted of an online survey amongst consumers and a self completion postal survey amongst trade organisations.

- Some general and specific points have emerged from the research, based upon a synthesis of all the areas of evidence utilised including consideration of pre-existing research, interviews with industry experts and consumer and trade field research.
- Definitions of 'local' and 'regional' food and drink are broadly similar across consumers and the trade, although trade respondents seem more dependent on mileage classifications than consumers. Local generally relates to the immediate vicinity of where consumers live or where businesses trade, and is almost universally associated with rural or close-to-rural areas. Regional produce is predominantly defined by consumers and traders as coming from a specific geographical area and has quality and premium associations, based on tradition and reputation.
- There appears to be a growing demand for local and regional food and drink which is essentially consumer-led. For most consumers this is based on the primarily positive attitudes toward such produce, and the perceived benefits it provides. Yet a notable exception exists amongst younger, poorer, urban consumers who do not necessarily recognize such advantages.
- However, even those with positive attitudes may not always translate those directly across into their buying behaviour and differences occur in actual buying, often related to the time-pressures of modern everyday shopping, cooking, especially amongst urban consumers who also work.
- For targeting purposes it is possible to identify four different consumer segments of the local and regional food and drink market: Devotees (23%) that buy frequently, and at the other end of the scale Cynics (16%), who do not buy at all. In the middle ground a distinction can be drawn between the Persisters (25%) who make an effort to buy based on the perceived positive attributes, and the Abstainers (36%), who find it difficult to overcome the barriers to buying despite having some recognition of the potential advantages. A focus on the middle ground attempting to encourage Abstainers to purchase more, overcoming the barriers to buying, and re-emphasising the advantages through marketing and other activities provides a potentially attractive avenue for future development.
- The barriers to consumer buying are further exacerbated by the logistical and distribution implications for large multiples, on which the UK grocery sector largely depends, where it has been revealed most shopping for local and regional food for use at home takes place. Similarly, national food service operators are constrained in their ability to provide local and regional options due to the periodic menu planning cycle, and the imperatives of availability and continuity of supply.
- The significance of the larger trade players for future growth and development is further highlighted by their growing awareness of the importance of the sector, and in particular the movements of the major retail operators to start to develop their activities around the local and regional food agenda e.g. building it into their marketing and promotion, and the development of regional food hubs for distribution.
- Building from these conclusions a number of recommendations are proposed based around: a targeted marketing strategy; consideration of educating consumers; marketing support for specialist outlets and so forth; supporting and extending the marketing operations of local suppliers and retailers in rural areas; overcoming restrictions in the supply chain and improving the effectiveness of marketing to raise awareness and aid accessibility by the large scale food trade, both retail and foodservice.

- ❖ The evidence provided in this research suggests that there is potential for the further growth in the sales of local and regional food and drink products, but currently there are significant behavioural, structural, and institutional factors that impede its wholesale expansion.
- ❖ The recommendations proposed within the report go some way to addressing how these restrictions may be tackled, but some other areas of research may further facilitate understanding of the most effective way forward. In particular, facilitating further understanding of how consumers make trade-off decisions between the negative factors associated with local and regional food and the positive benefits accrued could be undertaken looking at, for example, price sensitivities and the sensitivity of time inconvenience on demand. The viability of using retailer and food service loyalty scheme databases to target particular consumers could also be explored. Finally, it may be opportune to examine possible pre-existing and developmental models for regionally based distribution networks (hubs) that can integrate with major trade buying structures, leading to more effective and efficient access to local and regional produce throughout the sector.

Project Report to Defra

8. As a guide this report should be no longer than 20 sides of A4. This report is to provide Defra with details of the outputs of the research project for internal purposes; to meet the terms of the contract; and to allow Defra to publish details of the outputs to meet Environmental Information Regulation or Freedom of Information obligations. This short report to Defra does not preclude contractors from also seeking to publish a full, formal scientific report/paper in an appropriate scientific or other journal/publication. Indeed, Defra actively encourages such publications as part of the contract terms. The report to Defra should include:

- the scientific objectives as set out in the contract;
- the extent to which the objectives set out in the contract have been met;
- details of methods used and the results obtained, including statistical analysis (if appropriate);
- a discussion of the results and their reliability;
- the main implications of the findings;
- possible future work; and
- any action resulting from the research (e.g. IP, Knowledge Transfer).

Understanding of Consumer Attitudes and Actual Purchasing Behaviour with Reference to Local and Regional Foods

1. Introduction

1.1 The increasing demand for local and regional foods (IGD, 2005) presents potential economic and sustainability benefits. However, a range of driving forces that may increase motivation to purchase particular food types or reduce perceived barriers to purchasing create constant change in consumer tastes and preferences towards the purchase of particular food types. Moreover, it is clear that supermarkets remain the preferred shopping option based on the general desire of shoppers for a range of factors including convenience, product range, quality and value for money, despite the alternative distribution channels and independent outlets available to local and regional food suppliers.

1.2 In line with changing consumer attitudes and behaviours, trade intermediaries and providers of food service may identify that they need to respond to market changes or indeed be proactive in developing a position which is consistent with these trends. Policy initiatives also affect demand and supply dynamics that are, in this case, inextricably linked to both the sustainable consumption agenda (Jackson, 2005), and its enactment in the rural food production and farming environment (Defra, 2002).

1.3 Thus the Socio-economic Research and Intelligence Observatory (SERIO), formerly the Social Research & Regeneration Unit (SRRU), in collaboration with the University of Plymouth's Agrifood Centre (AfC), Rural Futures Unit and Small Business and Services Research Unit, was commissioned by Defra in April 2007 to undertake research to further understand consumer attitudes and actual purchasing behaviour, with reference to local and regional foods.

2. Research Aims and Objectives

2.1 The overall aim of this project is to contribute to the knowledge and understanding of the factors influencing consumers' attitudes and behaviours in the market for local and regional foods in England.

2.2 Within this the research has four main objectives:

- To characterise and evaluate the local and regional food industry in England, from the point of view of household and trade buyers, with a view to estimating its magnitude, the underlying driving forces, and the exact nature of the benefits sought from products of this type.
- To understand the various factors that influence purchasing decisions made by household consumers and trade buyers with regard to local and regional foods, with a view to assessing their relative importance in decision making.
- To identify and synthesise relevant sources of data relating to the consumption and marketing of local and regional foods, in order to provide a resource for the development of appropriate market offers by producers and processors.
- To inform future commercial and public policies in the local and regional food sector, through improving the viability and efficiency of suppliers, and ensuring that additional environmental and social benefits are achieved.

2.3 For Defra the project will contribute significantly to its understanding of the local and regional food marketing in England, and provide an evidence base from which policy can be developed. It is anticipated that findings from the study will be employed as a platform for instigating strategies for the sector that will enable effective product development and marketing, and stimulate rural enterprise. At the same time the potential economic benefits will be complemented by the environmental advantages offered by a more sustainable farm production and food processing industry.

3. Method

3.1 The study employed an integrative research framework, incorporating both primary and secondary research to achieve the project's four objectives. Using a sequential approach, quantitative statistical survey research has been based upon secondary research and grounded qualitative understanding of respondents' motivations, perceptions, attitudes and behaviours.

3.2 Reflecting this, the research design comprised three distinct phases:

- Secondary research.
- Primary qualitative research.
- Primary quantitative research.

3.3 The first phase of research combined a desk based investigation of secondary sources with discussions with industry experts in order to contextualise the study and enabled linkages with related work by government departments, industry agencies, trade representative bodies, and proprietary market research agencies to be identified. This incorporated an examination of previous related research, including a review of existing literature and relevant academic research that has investigated the demand for local and regional foods and the market more generally. Informal discussions with a range of industry experts from important stakeholder groups and agencies represent an additional key activity in phase one, insights from which helped to shape the later fieldwork element.

3.4 Twenty consumer focus group discussions were held throughout England during August and September 2007. The composition of each group was determined by an interlocking quota sampling approach to gain coverage and develop understanding of a range of different consumer types. Two focus groups were held in each of the nine Defra regions, one urban and one rural, in addition to two groups in London. This ensured that regional differences in local and regional food buying could be identified.

3.5 A total of 130 depth interviews were conducted with buying representatives within trade organisations. Thirty buying representatives within private sector retail and food services organisations were approached directly in a face-to-face scenario, while a further 100 respondents were contacted through a tele-depth approach. A semi-structured discussion approach was utilised in both the face-to-face interviews and telephone depth interviews to ensure that all topics of interest were included, whilst allowing the interviewer to explore emerging issues further. Sampling was complex to take account of wide ranging factors across the retail and food service sectors. Annual turnover figures obtained from the National Statistics' Annual Business Inquiry (ONS, 2007), informed the number of respondents to be recruited from each organisational type. Organisations were located within all nine English regions and represent a range of sizes, both in terms of annual turnover and number of employees.

3.6 Reflecting the sequential approach, the findings from the preceding phases informed the design of quantitative research, which comprised two separate strands, one with consumers, and one with trade intermediary and food service buying organisations.

3.7 The consumer survey collected data from a stratified sample of 1223 buyers using quota sampling criteria including regional location, age and gender to reflect the distribution of population and participation in food and drink buying behaviour. The survey was administered using an on-line consumer panel with over 145,000 potential respondents run by a well-established, international, commercial on-line research agency. This method was adopted in order to achieve the required number of responses within the quota bandings, and to attain coverage of all the question areas in a detailed questionnaire

3.8 The trade survey collected data using a rough quota sample based on annual turnover figures obtained from the National Statistics' Annual Business Inquiry (ONS, 2007). A postal survey was sent to a sample of 3,350 organisations sourced from the Equifax database, along with a covering letter explaining the purpose of the research. Organisations were sent a number of reminders to maximise the response rate and, as an incentive to take part, organisations were entered into a prize draw to win £500. In additional a number of telephone booster interviews were conducted to further increase the response rate. A total of 154 retail organisations and 193 catering organisations completed the survey.

3.9 Findings from the consumer survey can be seen as generalisable to the population as a whole. Although difficulties were encountered in recruiting participants for the trade survey, despite sending several reminders, conducting telephone booster interviews and offering organisations an incentive for participating, the number of responses are acceptable at an aggregated level.

3.10 Overall the approach has provided a detailed understanding of the factors influencing the purchasing behaviour of consumers in the local and regional foods market and enabled strategic insights into developing the local and regional food production and processing sector as a vehicle for growth and sustainable development of the rural economy.

4. Overview of the Policy Context and Previous Research

4.1 A recent government discussion paper "Food: An analysis of the Issues" (Cabinet Office, 2008), suggests that consumer choice about what and how they eat are related to their wealth, aspirations, tastes and politics. This is no more apparent than in consumers' decisions to purchase local and regional produce where purchasing behaviour can not only be regarded as a economic choice, but also have a political dimension, as well as being an expression of personal identity, and a reflection of what is done for leisure and pleasure.

4.2 At the same time, the dominance of multiple supermarket groups in the supply chain of food and groceries has never been more apparent (Competition Commission, 2008), and any investigation of the future of food buying must inevitably involve an assessment of the motives and behaviour of these major players. Given this backdrop, the forces shaping the demand and supply of local and regional food and drink, are likely to be wide ranging, complex and interrelated. They will also be shaped to a greater or lesser extent by policy decisions that are driven by priorities emerging around issues of economics, sustainability, health, and the future of agriculture and rural areas.

4.3 A summary of the extant research also suggests that definitional issues are inherent in the understanding of local and regional food and can tend to obscure some of the critical issues surrounding the future development of the sector. In essence the understanding and perceptions of different consumers should lead the growth of the area based upon the benefits they seek and the difficulties that they encounter 'in their mind' when buying. To this end it is clear that a large number of shoppers are interested in, and have positive attitudes toward local and regional food, and many translate this into actual buying behaviour. Yet is also apparent that many do not buy at all, or as frequently as they would like to, either because they do not recognize the latent benefits in so doing, or because they encounter insurmountable barriers to buying.

4.4 Evidence appears to indicate that there are wide ranging motivations for buying local and regional food and that there will be some differences between the two. However despite the acknowledgement of an interest in a number of different advantages of local and regional produce, for most shoppers the quality, freshness and taste attributes that tends to positively influence dominate buying decisions. Similarly, barriers around price, accessibility, awareness, and availability exist that need to be addressed. The general implications of these findings suggest that marketing communications messages need to take account of the different 'tiers' of motives for buying, and that there is a role for more widespread information to support consumers' decision making. Such messages need to recognize consumers' priorities and also target the particular needs and perceived disadvantages of different customer types when so doing. Further to this there needs to be a better understanding of the way in which trade outlets, both retail and foodservice in particular which lags behind the retail trade (IGD, 2006), can facilitate the future development of the sector.

4.5 The next section presents the findings of the primary research undertaken in this project. Following a detailed analysis of the results of this research, the conclusions and recommendation of the study will be outlined that will build upon the broad inferences discussed above, providing more detailed suggestions for marketing initiatives, and commercial and public policy.

5. Qualitative Consumer Element

5.1 Findings from the 20 consumer focus groups indicate that 'local' produce is understood by consumers in the context of rural or close-to-rural areas. It is predominantly associated with particular vegetables and some fruits, as well as meat and game, and fish and seafood in coastal areas.

5.2 'Regional food' is predominantly defined as 'from a region of Britain known for its production of particular foods/drinks' (e.g. clotted cream from Cornwall); or as 'the region I live in' (e.g. East Anglia). Londoners and other city dwellers are more likely to consider that, when applied to food and drinks, the terms 'local' and 'regional' overlap, having the same defining characteristics of taste, quality and provenance. Cheeses are the best examples of how 'regional' can be substituted for 'local' in this context.

5.3 The positive associations of local and regional produce are well accepted amongst most of the shoppers taking part in the focus groups; the notable exception to this, where acceptance is lower and some hostility encountered, is among the younger, poorer, urban groups.

5.4 With the exception of these young urban lower social respondents, product attributes of 'local' and 'regional' foods are seen as overwhelmingly positive; and provenance/heritage is a critical aspect of this.

5.5 Imagery and associations reflect nostalgia for a pre-supermarket past. However, there are clear tensions between these desirable associations and the time-pressures of modern everyday shopping and cooking, particularly among urban respondents.

5.6 Benefits to the local, regional or national economies were the most frequently cited reasons for buying local produce. From a personal perspective, the 'feel-good' factor of serving meals with local and regional ingredients is a major factor.

5.7 Expense and lack of everyday accessibility for most people, particularly in urban areas, means that local and regional foods tend to be bought for special occasions and treats, rather than incorporated into regular shopping habits.

5.8 Catering outlets' use of local and regionally sourced ingredients is not relevant when the motive for eating out is convenience. It is, however, an important driver when deciding where to eat out on special occasions. In addition, the context of these special occasions, associated as they are with leisure, 'treats' and holidays, is consistent with similar contexts in which local and regional food and drinks are bought for home use.

5.9 Local fruit and vegetables when in season, as well as game and some meats, seem to be the most popular local grocery foods. Fish appears to be the most popular local food when eating out on special occasions, largely due to respondents' unfamiliarity with how to cook it.

5.10 Whilst the innovative methods used to attract families in particular, by a number of independent local farms and retail outlets (e.g. public houses) was praised, there is an acceptance that large-scale changes in shopping behaviour can only feasibly occur with the active co-operation of the major supermarket multiples. A national advertising campaign, utilising the endorsement of at least one personality nationally recognised as having authority on the subject of food and drink/cooking/healthy eating, was recommended by most focus groups.

6. Quantitative Consumer Element

6.1 The consumer quantitative survey results show that consumers' distance definitions of local food and drink generally indicate that they believe it to come from within 30 miles of where they live. However when comparing rural with urban consumers, there is a clear difference in the distance from which produce is considered local with buyers in rural areas and rural regions seeing it as coming from a shorter distance than those located in urban areas and regions.

6.2 Conceptual definitions relating to where local produce comes from indicate that there is a wide ranging understanding of local food and drink generally, but again rural and urban differences exist both in terms of the areas and regions in which they are located. Rural consumers appear to display a greater connectivity with the concept of local produce than those in urban areas and with those in London in particular.

6.3 Regional food and drink is generally considered by most buyers to be specialist, high quality, premium produce grown, produced and marketed in a specific geographic region that has a reputation for providing that product category, but there are however differences between consumers. Rural consumers again appear to be more in tune with the concept and have a more refined understanding in comparison to those in urban areas and London residents in particular. Age differences also exist with older customers being more aware of the regional provenance of food compared with younger buyers.

6.4 About half of food and drink buyers stated that they bought local produce in the last week for use at home and about a quarter when eating out. As the time period increases so does the incidence of buying in both these situations. Actual purchase frequency amongst those buying is variable but overall quite high when buying for home use, but not when eating out. Buying intentions to purchase local produce for use at home were also quite high, with intentions to buy when eating out again being lower.

6.5 Regional food and drink followed a similar pattern of buying to local produce with a smaller proportion buying, just under half, for eating out in the last week, but more, around thirty percent, buying when eating out in the same time period. There is variability in the frequency of buying regional produce, although overall a large proportion of consumers buy regional food regularly when using at home, but not as many when eating out. Intentions to buy regional produce were quite high and increased as the purchasing time period increased.

6.6 When buying both local and regional food and drink produce the main food types bought were fruit and vegetables, eggs and dairy products, and meat and meat products. Bread and cereals, fish and seafood, and drinks and beverages were bought by fewer consumers, both for local and regional produce. In general local produce was more widely bought than regional except in the case of the two least popular categories, fish and seafood, and drinks and beverages.

6.7 Frequency of buying local and regional produce for all categories is generally high with no real differences apparent between the two, except perhaps in the case of meat where regional produce appeared to be bought more frequently for use at home, and regionally supplied fish which was bought more frequently when eating out. In general frequency of buying when eating out was lower than when buying for use at home.

6.8 Most consumers buy local and regional produce as part of their regular shop and buy predominantly from supermarkets and local specialist shops. Farm shops and farmers markets are also popular outlets particularly for local food and drink. Secondary purchasing occasions include special occasions, buying as a treat, and when eating out. The most popular venues for eating out are pub restaurants and bistros followed by quality restaurants in the case of both local and regional produce.

6.9 Attitudes toward buying local food and drink are generally positive across the buying population as a whole. However there is a degree of variability in this particularly with regard to the role of influential others in buying decisions, and the ability of consumers to have the control over their buying which enables them to translate their positive attitudes into actual buying behaviour.

6.10 The main reasons given for buying local produce were support for local producers, retailers and the community; freshness, taste and quality of the produce; reducing food miles; and knowing where the produce comes from. Categorising these into broad sets of factors indicates that food and drink characteristics, local support and provenance, sustainability and ethics, and shopping factors positively affect buying.

6.11 Important barriers to buying local produce include cost and availability. Also important are a lack of information on availability and limited promotion. Restricted range of products is a further important barrier. Overall factors that can be regarded as negative influences on buying local produce are availability and awareness, inconvenience, and specific product characteristics.

6.12 When looking at relationships between actual buying and reasons for buying and not buying, the main positive determinants of consumers' buying behaviour for use at home were buying the amount they want to, and the taste, freshness and seasonality of the produce, with the main negative influences being a lack of information and buying being time consuming. When eating out buying the amount they want to, knowing where the produce comes from, taste and seasonality were important as well as the produce being 'not branded'. Negative eating out effects were associated with a lack of information and expense.

6.13 Similar relationships existed for behavioural intentions when using at home, although with intentions a much wider range of reasons were important including support for the local economy and sustainability factors; being environmentally friendly had a negative effect on behavioural intentions in this situation. Intentions to buy when eating out were governed by similar factors as the actual buying, although interestingly being not well promoted and not branded were seen to induce positive effects, and being time consuming a negative effect.

6.14 When considering larger buying factors and psychographics, local support and provenance bring about positive effects and, availability and awareness and inconvenience negative effects on buying local food for use at home. The rural location of the consumer and their ethical identity are also positively associated with buying in this situation. Generally, similar effects exist when eating out although there were additional positive 'shopping' and 'product' effects in this situation, together with a negative sustainability and ethical effect. Rural location is no longer significant in this instance, but there is a strong negative relationship with consumers' environmental concern.

6.15 Some differences exist between the effects on actual buying and buying intentions when eating out with rural location and ethical identity no longer being important, but the health consciousness of the consumer becoming so. For eating out intentions far fewer effects are significant with only positive effects of local support and provenance, shopping', and ethical identity being presents, and the main negative effect being associated with the environmental concern of the consumer.

6.16 The main reasons for buying regional food and drink were support for the regional and national economy, the high quality and reputation of the produce coming from that region, and providing good value for money. The general factors for buying regional produce categorised into high quality, branded positioning and area association and support.

6.17 Positive associations with the actual buying of regional food for use at home are being the best available, being widely available, even though there are cheaper alternatives available, supporting the regional economy, and providing good value for money; being promoted nationally had a negative effect. Similar effects were present for eating out except for being promoted nationally, with being priced at a premium providing a further positive effect.

6.18 A large number of positive effects are associated with the buying behavioural intentions of consumers for regional food and drink including support for the local economy, high quality, best available, widely available, reputation, providing good value for money even though it is priced at a premium and there are cheaper alternatives available. Negative effects occurs with the produce being promoted nationally, and being traditional.

6.19 Positive buying factor and consumer psychographic effects on actual buying of regional food for use at home include high quality, area association and support, rural location, health consciousness, and local identity and attachment. For eating out there was a positive effect for high quality and a negative one for environmental concern of the consumer. Behavioural intentions for regional food are positively related to high quality, area association and support, and environmental concern, and negatively related to consumers' ethical identity and identity and attachment to the nation.

6.20 In considering the main factors that affect local produce buying and buying intentions, the overwhelmingly most positive factor is local support and provenance, whilst the main negative effects come from lack of availability and awareness, and inconvenience. The perceived high quality of regional food and drink is by far the most important factor in positively influencing the behaviour of buyers, followed by area association and support.

6.21 Major differences exist between the buying behaviour of rural and urban consumers, with rural buyers intending to and actually buying more local and regional produce on all occasions compared with those located in urban areas. There are also differences in the importance of buying factors with rural consumers putting a higher emphasis on the positive reasons for buying local produce, and the urban consumers indicating a higher importance of negative factors.

6.22 Regional differences in buying behaviour also exist with, in general, rurally dominant regions having a greater propensity to buy local and regional produce for use at home compared with London in particular. The local support and provenance factor is also higher in rurally dominant regions especially the South West compared with regions that have a predominantly urban composition. All the negative buying factors are higher in all other regions compared with the South West, and especially in London.

6.23 Older consumers generally buy more local and regional produce for use at home. However, fewer older people buy local produce when eating out, due to the overall effect of younger people eating out more in comparison with older people. Older consumers recognize the positive effects of food and drink characteristics, and local support and provenance more than those in younger age groups, whilst younger buyers are generally influenced by all the identified barriers to buying.

6.24 The buying intentions of women toward local produce are greater than those of men. Women are much more positive about buying local food for all the reasons identified compared with men, and also recognise the significance of area association and support when making regional produce buying decisions.

6.25 Differences exist between single buyers compared with all other groups, particularly married consumers. Single buyers' purchase intentions are lower for local produce and buying frequency lower for regional produce. Married consumers have a more positive recognition of the importance of local support and provenance and sustainability and ethics compared with single buyers. The latter place much more importance on all the barriers to buying local produce compared with all other groups.

6.26 Some differences exist between socio-economic groups with consumers classified in the highest group buying more local produce when eating out compared with the lowest groups, and also putting a greater emphasis on the importance of local food characteristics.

6.27 The number of children in a household does not appear to be a significant factor in influencing differences in buying behaviour for local and regional produce.

6.28 A classification of local and regional food buyers was developed based on the importance of buying influences. Figure one shows that four customer segments were identified: Persisters (25%), Devotees (23%), Abstainers (36%), and Cynics (16%).

Figure One: Local and Regional Produce Consumer Segments

Devotees (23%)	**Persisters (25%)**
❖ More women ❖ More 45+ ❖ More rural ❖ Fewer London and NW ❖ More SW, EA and Y&H ❖ More married ❖ More degrees and A levels	❖ More men ❖ More 55+ ❖ More rural ❖ Fewer 35-44 ❖ Fewer London ❖ More SW and EA ❖ More £15-25,000 ❖ Fewer C1 ❖ Fewer degrees
Abstainers (36%)	**Cynics (16%)**
❖ More women ❖ More 18-44 ❖ More urban ❖ More London, SE and NW ❖ Fewer SW and EA ❖ More single ❖ More inner city and town centre ❖ More £30-50,000 income ❖ More C1	❖ More men ❖ More 55+ and 35-44 ❖ More urban/inner city ❖ Fewer SW ❖ More GCSEs

6. 29 The Devotees are the most positive toward buying local and regional produce whilst the Cynics are wholly negative. Of the two intermediate groups, the Persisters have more positive attitudes, and try hard to overcome barriers and buy these products for use at home, through having greater control over their buying behaviour. On the other hand, the Abstainers find it difficult to go through with their buying intentions as they place greater emphasis on the barriers to buying, even though they view the positive aspects of these products in a similar way. The differences in the demographic characteristics of the segments generally reflect the variations in buying behaviour that have already been established.

7. Qualitative Trade Element

7.1 The qualitative interviews with trade organisations revealed that a large proportion of organisations felt that ‘local’ equated to the immediate vicinity and the general consensus was that ‘regional’ equated to some kind of regional boundaries, however there was a degree of overlap between these two definitions.

7.2 The majority of organisations felt the area of local and regional food and drink had become more important in the last five years, with the main reason for this being a general increase in publicity, awareness of the area and food safety issues and a desire to support the local economy.

7.3 The key commercial driver of promoting local and regional food and drink purchasing was consumer demand, reinforced by local promotional activities such as Farmers markets, TV coverage and advertising, freshness and support for the local economy.

7.4 The majority of organisations felt that consumer demand for local food and drink was growing and is likely to do so in the immediate future. Some respondents equated this demand with that for organic foods, but felt that demand would rise faster as a result of publicity surrounding global warming and environmental sustainability.

7.5 The three key areas that would encourage organisations to source more food and drink from local and regional sources were a lower price, increased availability of local and regional food and drink and the assurance of quality.

7.6 Currently local and regional food and drink accounts for an estimated 1-2% of all food and drink sales in the main retail sector, with an estimated equivalent amount being sold through farm shops and farmers markets, however, the face-to-face interviews indicated that this proportion differs within organisational categories. The consensus was that there had been a significant growth in these figures in recent years and that this was likely to continue over the next five years.

7.7 Where local and regional food and drinks were promoted by organisations this was generally done in-store, while a few were found to market nationally. Promotion and sales in national foodservice chains was more problematic due to the advanced menu planning systems employed and concerns over continuity of supply.

7.8 Local and regional sales were found to be more dominant in fresh products such as meat, fruit, vegetables and dairy products. Constraints in terms of availability were, however, highlighted for these fresh products. In addition, there was a significant presence of locally brewed beers, ciders and some wine, with increasing volumes of bottled drinks into the retail sector rather than cask products directly into pub outlets.

7.9 Respondents participating in the face-to-face interviews had, in some cases, increased the number of staff employed within their organisation in order to address the purchasing, technical and logistics issues associated with local food and drink procurement.

7.10 In terms of the impacts of purchasing local and regional food and drink on organisation's distribution and logistics, the larger organisations participating in the face-to-face interviews generally agreed that this was the most difficult problem to solve. In contrast a number of organisations participating in the tele-depth interviews did not feel this had any impact, with a number highlighting that local suppliers were particularly flexible in terms of deliveries.

8. Quantitative Trade Element

8.1 The quantitative survey found that the general understanding of trade buyers is that local or regional produce is grown within the boundaries of that locality or region, with a significant proportion also believing that being produced or packaged within the confines of those geographical areas is sufficient for such a definition. Most respondents regard local produce as being sourced from within 50 miles, although reasonable proportions identify it more narrowly with the immediate vicinity (up to 20 miles), or more widely (in the county). Regional food and drink was considered by most to be sourced from within that region although many also saw it as coming from within a county or neighbouring county. The vast majority of respondents regarded local and regional produce to be different.

8.2 A large proportion of trade buyers identified a growing importance of local and regional produce over the past five years, and indicated that they saw this trend continuing into the future. The majority of organisations sourced local and regional food, and a large number of these considered both local and regional produce to be important to their organisation.

8.3 The main reasons for organisations buying local and regional produce were support for the local economy, quality, freshness and traceability of the produce, and increased consumer demand. When considering what would encourage them to buy more local and regional food and drink, the main drivers were increasing consumer demand, lower prices, better quality and range of produce, and greater support for the local economy.

8.4 There are wide variations in the proportions of total spending on local and regional produce across the trade sector, yet there was a general consensus amongst the majority of buyers that spending on this produce had gone up over the last five years. Most buyers also indicated that they expected this growth to continue for the coming five year period.

8.5 The most widely sourced local and regional food and drink products were vegetables, meat, dairy, and bakery produce. The main reasons for sourcing these locally were flexibility, particularly of delivery, and specific product quality factors such as freshness. Most buyers did not see any real problems in sourcing local and regional produce, although in some cases the restriction of seasonality of produce was identified.

8.6 Promotion of local and regional produce was undertaken by most organisations, in a wide variety of ways. The dominant methods were in-store point of sale and display activities, word of mouth, on pack/menu information, posters, and websites. Differences existed in the approaches adopted by retail and foodservice organisations, due to the nature of their businesses. The incidence of joint promotions with suppliers and regional food groups was disappointingly low.

8.7 Trade buyers perceived that the main factors influencing consumer demand for local and regional produce were product quality, particularly freshness, followed by price and availability. Environmental impacts and traceability and provenance were regarded as being of lower importance.

8.8 Some interesting differences exist between types of businesses particularly multiple and independent traders, with multiples generally perceiving that local and regional produce has become more important overall and to their own businesses. Similarly, more of them see it as increasing in importance in the future. Yet they do not envisage it as growing at such a high rate as independents both in terms of their own spending and in the market as a whole.

9. Conclusions

9.1 Some general and specific points are now drawn from the research which are based upon a synthesis of all the areas of evidence utilised including consideration of pre-existing research, interviews with industry experts, and each of the two phases of consumer and trade field research.

9.2 Definitions of 'local' and 'regional' food and drink are broadly similar across consumers and the trade, although trade respondents seem more dependent on mileage classifications than consumers.

9.3 Local generally relates to the immediate vicinity of where consumers live or where businesses trade, and is almost universally associated with rural or close-to-rural areas. There is some variation in this with, in particular, rural consumers being more connected with the concepts of locality and provenance in food and drink compared to urban dwellers.

9.4 Overall, definitions of 'local' around provenance are more clearly understood by consumers in rural contexts, and possibly by smaller independent retailers, and foodservice providers in these areas. On the other hand, urban consumers and traders have a wider understanding of the concept, and may link it to the county, a region, or even the nation.

9.5 The existence of differences in understanding of the concept of local produce should be regarded as an opportunity to pursue appropriate targeted marketing initiatives based upon how it is perceived and the benefits it offers to different groups.

9.6 Regional produce is predominantly defined by consumers and traders as coming from a specific geographical area and has quality and premium associations, based on tradition and reputation. Differences exist between the understanding of urban and rural consumers, with the former regarding it as a 'wider' definition of the 'local' concept. Older consumers also appear to have a better understanding of 'regionality' in food, which suggests potential for developing awareness of regional produce amongst younger age groups.

9.7 'Regional' therefore seems to have more readily brand-able connotations, often coinciding with Defra regions (and presumably reflecting the efforts of regional food marketing bodies);

9.8 There appears to be a growing demand for local and regional food and drink which is essentially consumer-led. About half the respondents stated that they bought local produce for use at home, and a quarter when eating out, in the last week. Frequency of purchase of both local and regional produce is variable across consumer groups, and tends to be higher for use at home than when eating out.

9.9 For most consumers this is based on the primarily positive attitudes toward such produce, and the perceived benefits it provides. Yet a notable exception exists amongst younger, poorer, urban consumers who do not necessarily recognize such advantages. However even those with positive attitudes may not always translate those directly across into their buying behaviour and differences occur in actual buying, often related to the time-pressures of modern everyday shopping, cooking, especially amongst urban consumers who also work.

9.10 Trade demand, and therefore supply into the market, has generally been in response to this. The positive attitudes of the trade and recognition of the past, current, and future growth of the sector reflect increasing consumer demand, based on association with key attributes. This has been bolstered by greater awareness through the growth of farmers' markets, and TV coverage and advertising promoting the advantages of local and regional produce.

9.11 Fruit and vegetables, dairy products and meat (and fish in coastal areas) are the categories where 'local' is best understood and valued. This is evidenced by the main categories of buying local and regional food both amongst consumers and within the trade, and the impact on demand has been greatest in terms of buying for consumption at home rather than when eating out.

9.12 The main outlets used when buying for use at home are supermarkets and local specialist food shops, which is done so as part of their regular shop. Farm shops and farmers' markets are also popular outlets for buying local produce, but nowhere near as important to the vast majority of buyers. When buying local and regional produce when eating out the main venues are pub restaurants and bistros, and quality restaurants.

9.13 The key reasons for buying local produce are freshness, taste and quality of the produce; support for local producers, retailers and the community; perceived sustainability benefits, and known provenance of the produce. Barriers to buying local produce are cost, availability, a lack of information on what and where to buy, and limited promotion.

9.14 The positive factors that determine the actual buying behaviour of local food are buying the amounts required, taste, freshness and seasonality, with negative influences on buying being a lack of information, and purchasing being time consuming. The fact that local food was 'not branded' has a positive effect on buying when eating out. These factors reflect the practical benefits identified those that buy or do not buy.

9.15 A wider set of factors influence behavioural intentions which include the additional effects of support for the local economy, and sustainability benefits (e.g. reduced food miles and pollution). Being 'environmentally' friendly had a negative effect on buying, which is important when identifying what messages to convey in any promotional activity. These factors tend to reflect the motives of those who buy local as a preferred choice, and buy more often, and include many older people in rural areas.

9.16 For regional produce, the main reasons for buying and factors influencing buying behaviour are overwhelmingly associated with its perceived quality, and regional and national support. Being a premium product, high price was generally regarded as positive; reaffirming that it was of the best quality and better than the cheaper alternatives available.

9.17 'Local' food (rather than regional) is, for consumers, important in foodservices, but only for a fairly narrow category of outlet (independent restaurants, country pubs etc.); and even then it is purchased less frequently. Local food is linked with 'special occasions', and this is reflected in terms of outlets where it is expected/would be seen as a benefit, as well as in domestic consumption.

9.18 Major differences exist between the buying behaviour of rural and urban consumers, with more emphasis on the positive buying factors amongst the former, and a greater weight given to the negative barriers amongst the latter.

9.19 Other significant differences amongst consumers are apparent between age groups, gender, single compared with married food shoppers, and regions. In general older, married women in rurally dominant regions buy more local and regional produce. Interestingly, the presence of children in the household, and socio-economic grade do not have any real effect on buying behaviour, except in the case of the latter where higher grade groups buy local produce when eating out more often.

9.20 For targeting purposes it is possible to identify four different consumer segments of the local and regional food and drink market: Devotees (23%), who buy frequently and, at the other end of the scale, Cynics (16%), who do not buy at all. In the middle ground, a distinction can be drawn between the Persisters (25%), who make an effort to buy based on the perceived positive attributes, and the Abstainers (36%), who find it difficult to overcome the barriers to buying despite having some recognition of the potential advantages. A focus on the middle ground, attempting to convert Abstainers to Persisters, overcoming the barriers to buying, and re-emphasising the advantages through marketing and other activities, provides a potentially attractive avenue for future development.

9.21 For many consumers in this study, there are strong *emotional* drivers for buying local and regional food, but also strong countervailing *practical* barriers to purchase, particularly when shopping for groceries for use at home. Conversely, the important *moral* drivers are economic ('help the local economy'), and other drivers which indicate self-interest and family health considerations rather than broader 'save the planet' or 'build a fairer world' motives. The evidence suggests, not that most consumers don't buy, but that many buy relatively little, and of a fairly narrow range of products (fruit, vegetables, dairy produce, some meat and fish, etc.). This confirms that the 'value-action' gap between what is desirable and what is achievable is very much apparent in the buying behaviour of consumers in this sector.

9.22 The barriers to consumer buying are further exacerbated by the logistical and distribution implications for large multiples, on which the UK grocery sector largely depends, where it has been revealed that most shopping for local and regional food for use at home takes place. Similarly, national food service operators are constrained in their ability to provide local and regional options due to periodic menu planning cycles, and the imperatives of availability and continuity of supply.

9.23 The significance of the larger trade players for future growth and development is further highlighted by their growing awareness of the importance of the sector and, in particular, the movements of the major retail operators to start to develop their activities around the local and regional food agenda e.g. building it into their marketing and promotion, and the development of regional food hubs for distribution.

9.24 Many of the larger foodservice businesses have more recently been turning their attention to this, in most cases behind activities of the multiple retailers, and the smaller foodservice and retail outlets, where the strategic and business positioning effects of local and regional produce are seen as important for drawing customers into their outlets. There was some evidence also of larger regional players pursuing similar strategic opportunities around local sourcing, taking advantage of flexibility of delivery which was seen to be the most important factor to trade buyers when sourcing produce locally.

9.25 Trade buyers perceive that consumer demand is the main driver of sales growth, and that this is linked to food quality, freshness, taste and provenance, and support for the local economy, but that this was variable across different consumer groups in different geographical areas. The characteristics of the catchment area, market sector or outlet brand are of key importance in determining the extent to which national players integrate local and regional food into their business strategies and operations.

9.26 By carefully targeting different consumer groups with the messages that are relevant to their own particular needs and constraints, and working with retail and food service organizations to make the produce more widely and readily available, it may be possible to further grow and develop the local and regional food sector.

10. Recommendations

Building from these conclusions, the following recommendations are proposed as areas of possible action.

10.1 Initially, the significance of the further development of consumption of local and regional food and drink to future policy needs to be assessed. The practical barriers that most consumers encounter, and the potential difficulties involved in the systemic retailer/foodservice supply chain make the growth of the sector a challenging task.

10.2 Nonetheless, attitudes towards local and regional produce are generally positive, and there has been a trend of growth evidenced by both consumer buying patterns and trade interest and initiatives. Despite the widespread recognition of the benefits of these products, there are, however, many obstacles to buying that tend to take prominence over the perceived advantages, thus leading to many consumers not fulfilling their intentions to buy. This is particularly evident amongst younger, urban, middle-income consumers, consistent with the 'Abstainers' of the developed typology, and representing the largest group of food and drink shoppers in the population as a whole. Targeting this segment would appear to be a potentially viable way forward, and this may be achieved by harnessing retailers' databases and loyalty schemes, pinpointing customers that meet the 'profile' for specific promotional effort.

10.3 A marketing strategy for the 'Abstainer' segment would need to be carefully developed, especially given that many will be located in urban areas and thus have their own particular 'representation' of local and regional that may not necessarily have its provenance in the rural domain, but be more county, region, or indeed, nationally oriented. 'Regional' & 'British' brands are, therefore, more likely to appeal to these groups. Supermarkets need to be encouraged in their stocking and promotion of these products, as grocery shopping habits are entrenched amongst these customers, and it is not viable to try to modify this behaviour (in terms of store(s) used and shopping patterns) to any great extent.

10.4 As urban consumers demonstrate less identification with 'local' produce, and are generally not experimental in their shopping choices, clear and consistent (i.e. *national*) branding of regionally produced fruit and vegetables, meat and fish, and possibly dairy products would inform and encourage consumers and also 'lead' the trade in both grocery retailing and foodservices. To this end, there appears to be substantial scope for greater education, especially amongst younger consumers, about the availability of regional foods, and their specific qualities, building on tradition and reputation.

10.5 If a new 'regional food' brand is to be developed, the consumer confusion between local, organic and free-range needs to be addressed, as does the misunderstanding between locally grown, locally stocked and locally produced.

10.6 Promotional messages should educate consumers on these differences; labelling of local products needs to be clear in terms of weights/prices as well as provenance, as does menu information in the foodservice environment. Information and promotion should, therefore, not only clearly restate the specific tangible benefits FOR buying, but also help overcome reasons for NOT buying. Quality, freshness, taste, seasonality, local support, health benefits, are all on the agenda here, but not environmental issues which are viewed as 'negative motivators'. Reassurance about overcoming barriers should focus on what to buy, when and where from; value for money, particularly being able to buy in the quantities required, and so avoid waste; and ease of preparation and versatility of use.

10.7 In order to help 'connect' urban consumers with local/regional products, marketing support for independent specialist outlets (and traditional markets), as well as local independent restaurants etc should be considered (e.g. patronising a local baker who sells fresh bread has a number of the sensory and emotional benefits associated with buying local, and is a lot easier to access than farms/farm shops for city dwellers). Although successful at bringing fresh products into urban areas, farmers' markets are itinerant and, therefore, more difficult to connect with emotionally than neighbourhood shops. This recommendation has particular resonance when one considers the importance of supporting the local economy to respondents.

10.8 Developing a brand which emphasises trust, by consumers and along the food chain, extending into the heart of urban areas, would be ambitious. There is evidence, however, that local food artisans, such as butchers and bakers, for example, can generate high levels of trust on the part of their customers.

10.9 Availability and seasonality are restrictive choice factors for the locally grown produce we recommend promoting; however these can be used to marketing advantage (scarcity and exclusivity are readily relatable concepts, and scarce/limited production is a classic reason for price premiums for natural products). This works well with the regional food concept, and there may be potential to extend this into the positioning of local food and drink.

10.10 These measures, already outlined, relate to increasing purchases by the primary target group of ‘Abstainers’; the secondary market to be addressed is the ‘Persisters’ (older, more rural, less well paid respondents). Apart from social group and income, these have more in common with the ‘Devotees’ than other segments. Supporting and extending the marketing operations of local suppliers and retailers in rural areas should encourage both these groups. The ‘Cynics’ can be equated to new product adoption ‘laggards’ and need not be included in any early strategy development (they may never be convinced and ‘convert’ and the marketing effort required would be prohibitive and not reap the returns).

10.11 Facilitating growth amongst existing and potential buyers is dependent on overcoming restrictions in the supply chain and improving the effectiveness of marketing to raise awareness and aid accessibility by the large scale food trade, both retail and foodservice.

10.12 An opportunity exists in developing regional distribution hubs that not only collect and transfer produce to the large retailers’ Regional Distribution Centres, but also provide supplier vetting, sourcing and assistance with presentations, ‘meet the buyer’ sessions, and advice on costings. Regional Food Groups could be used as facilitators of such networks, and could also assist large foodservice chains in gaining access to assured sources, and overcoming the particular anxieties that they hold with regard to continuity of supply, potentially taking advantage of flexibility of supply.

10.13 Further to this, the main retailers could make a big impact if they dedicated shelf space to local produce rather than diluting it within categories; this could be end of aisle, ‘gondola’ type displays. There may be an opportunity to offer marketing support in partnership with RFGs or county Food Links, who could be responsible for merchandising and management of that area of the store.

10.14 The evidence provided in this research suggests that there is potential for the further growth in the sales of local and regional food and drink products, but currently there are significant behavioural, structural, and institutional factors that impede its wholesale expansion.

10.15 The recommendations proposed here go some way to addressing how these restrictions may be tackled, but some other areas of research may further facilitate understanding of the most effective way forward.

10.16 Further understanding of how consumers make trade-off decisions, between the negative factors associated with local and regional food and the positive benefits accrued, could be undertaken looking at, for example, price sensitivities and sensitivity of time inconvenience on demand.

10.17 The viability of using retailer and food service loyalty scheme databases to target particular consumers could be explored, especially with respect to identifying target segments through profiling techniques. This could be based upon responses to the importance of buying and non-buying factors, and pinpointing consumer segments through geodemographic databases.

10.18 Finally, it may be opportune to examine possible pre-existing and developmental models for regionally based distribution networks (hubs) that can integrate with major trade buying structures, leading to more effective and efficient access to local and regional produce throughout the sector.

References to published material

9. This section should be used to record links (hypertext links where possible) or references to other published material generated by, or relating to this project.

ADAS 2007. ***"Market Research Report on Quality Regional Food Businesses".*** ADAS. Wolverhampton.

BrookLyndhurst/Countryside Agency 2004. ***"Promoting Sustainable Local Products in Yorkshire and Humberside Report for the Countryside Agency".***

Cabinet Office. 2008. ***"Food: an analysis of the Issues".*** Strategy Unit Discussion paper.

http://www.cabinetoffice.gov.uk/strategy/work_areas/~/media/assets/www.cabinetoffice.gov.uk/strategy/food/food_analysis_of_issues%20pdf.ashx

COI/FSA 2003. ***"Local Food – Report on Qualitative Research for the Food Standards Agency".***

COI/FSA 2007. ***"Omnibus Research Report prepared for the Food Standards Agency".***

Competition Commission. 2008. ***"Grocery Market Inquiry".***

http://www.competition-commission.org.uk/inquiries/ref2006/grocery/index.htm

CRPV. 2007. ***"Food Engagement on Social Traceability and Accountability – FESTA".*** Project Proposal Draft 5. Projects and Development Service.

Deloitte Touche. 2007. ***"An Appetite for Change: Food and Beverage 2012".*** Deloitte Touche. London.

Defra. 2002. ***"Strategy for Sustainable Farming and Food: Facing the Future".*** Defra. London.

Defra. ***Policy Paper on Local Food.***

http://www.defra.gov.uk/foodrin/foodname/lfood/pdf/locfoodpolicy.pdf

Foundation for Local Food Initiatives 2002. ***"The Local Food Sector".*** f3. Bristol.

Food from Britain 2007. ***"UK Food and Drink Market Insights",*** Vol. 1. No. 1, p.1.

IGD. 2002. ***"Consumer Watch 2002: Local and Regional Foods".*** IGD. Watford.

IGD. 2005. ***"The Local and Regional Food Opportunity".*** IGD. Watford.

IGD. 2006. ***"Retail and Foodservice Opportunities for Local Food".*** IGD. Watford.

Jackson, T. 2005. ***"Motivating Sustainable Consumption – a review of evidence on consumer behaviour and behavioural change".*** Policy Studies Institute. London.

Kuznesov, S., Tregear, A. and Moxey, A. 1997. ***"Regional Foods: a consumer perspective".*** British Food Journal. Vol. 99 pp. 199-206.

"Local Food for Local Shops: a toolkit for shopkeepers in Berkshire, Buckinghamshire and Milton Keynes & Oxfordshire (BBO)". Oxford Brookes University, Oxford.

Manning, L., Baines, R.N. and Chadd, S.A. 2006. ***"Ethical Modelling of the Food Supply Chain".*** British Food Journal. Vol. 108 (5) pp. 358-370.

McCarthy, M. 2002. ***"Make Local Foods Focus of Rural Life, say Experts".*** The Independent, 20th April 2007.

Memery, J., Megicks, P. and Williams, J. 2005. ***"Ethics and Social Responsibility Issues in Grocery Shopping: a preliminary typology".*** Qualitative Market Research: an International Journal. Vol. 8 (4) pp. 399-412.

Mintel Report. 2003. ***"Attitudes Towards Buying Local Produce – UK".*** Mintel.

Mintel Report. 2003. ***"Organic Foods – UK".*** Mintel.

Mintel Report. 2006. ***"Attitudes Towards Ethical Foods – UK".*** Mintel.

Morris, C. and Buller, H. 2003. ***"The Local Food Sector: a preliminary assessment of its form and impact in Gloucestershire".*** British Food Journal. Vol 105 (8) pp. 599-566.

Pretty, J.N., Ball, A.S., Lang, T. and Morison, J.I.L. 2005. ***"Farm Costs and Food Miles: an assessment of the full cost of the UK weekly shopping basket".*** Food Policy, Vol. 30 (1) pp. 1-19

The Retail Pocket Book 2005. ***"The British Shopper".*** p.76.

Ricketts Hein, J., Ilbery B. and Kneafsey M. 2006 ***"Distribution of Local Food Activity in England and Wales: an Index of Food Relocalization".*** Regional Studies. Vol. 40 (3) pp. 289-301.

Seyfang, G. 2007. ***"Sustainable Consumption, the New Economics and Local Organic Food".*** Centre for Social and Economic Research on the Global Environment (CSERGE). University of East Anglia, Norwich.

Tastes of Englandsnorthwest/Weber Shandwick. 2004. ***"Developing Regional and Quality Food and Drink in England's NorthWest".*** Weber Shandwick.

Tregear, A. and Ness, M 2005. ***"Discriminant Analysis of Consumer Interest in Buying Locally Produced Foods".*** Journal of Marketing Management Vol. 21 pp. 19-35.

Tozer, J. 2007. ***"Why the Vegetable Plot is Rediscovering its Roots".*** Daily Mail. 11th August 2007.

Weatherell, C., Tregear, A. and Allinson, J. 2003. ***"In Search of the Concerned Consumer: UK public perceptions of food, farming and buying local".*** Journal of Rural Studies. Vol. 19 pp. 233-244.

http://en.wikipedia.org/wiki/Local_food

http://statistics.defra.gov.uk/esg/rural_resd/rural_atlas/atlas_maps/4.jpg.

http://www.defra.gov.uk/foodrin/foodname/regional/regional01.htm.

http://www.bbc.co.uk/food/food_matters/foodmiles.shtml.

http://www.bbc.co.uk/food/food_matters/slowfood.shtml.

http://worldhungeryear.org/fslc/faqs/ria_052.asp?section=5&click=1.