UNDERSTANDING CONSUMERS' BARRIERS AND FACILITATORS OF FRESH FRUIT CONSUMPTION IN CATALONIA: A QUALITATIVE STUDY OF CONSUMERS AND STAKEHOLDERS

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5. Introduction

The continuous decline in fruit and vegetable consumption in developed countries is a growing concern for health authorities, as there is an increase in cardiovascular diseases and obesity, the latter of special importance in children and younger population, from which the consumption of fruit is lower reaching levels below the WHO recommendations (400 g of fruits and vegetables per day) [Iglesias (2013)]. In Spain and Catalonia consumption levels also follow this trend [MAPA (2018)].

Catalonia is the most important production area of sweet fruit in Spain. With more than 55,000 hectares of fruit orchards, it annually produces around 1 million tonnes of apple, pear, peach, and nectarine. Therefore, the economic importance of the sector is high, and it has a clear export orientation [PRODECA (2018)]. In 2018, a participative diagnose detected the fall of consumption in the domestic market as a sector weakness. Furthermore, there is a low valuation of the product in the eyes of the consumer.

The goal of this study is to understand consumers' barriers for fresh fruit consumption and determine which facilitators would help to increase it. To tackle this issue, we performed a qualitative analysis focused on consumers and stakeholders, namely, wholesale distributors and restaurateurs. The study was launched during the second semester of 2018.

6. Methodology

To tackle our goals, we used modified methods derived from the Focus Group (FG). FG allows obtaining the less rationale and the more spontaneous information that usually is not obtained through questionnaires [Krueger y Casey (2009)]. A modified nominal group technique (NGT) was applied for consumers. The NGT applies a fixed structure to the meetings. It is oriented to the generation of ideas and their ordering (ranking). This technique was initially developed by Delbecq et al. (1976) and has been used since then for business and academic purposes [Reig et al. (2019); Bromley (2014); Vanmeerbeek et al. (2016)]. As in the FG, the desirable number of participants is between 5 and 10.

The structure of the sessions was divided in our two main topics of interest: (1) identifying fresh fruit consumption barriers and, (2) proposing facilitators. For each topic the same procedure was followed. Firstly, each participant wrote his/her ideas in silence. Then, they were collected and projected on a screen, while the moderators ensure that all participants equally understood the ideas. After this clarification, participants were asked who proposed the most mentioned idea and why. This was done subsequently for all the following ideas. Debate was promoted to allow all participants arguing in favour of or against any of the expressed ideas. Afterwards, participants were asked to rank the listed ideas and were given 15 points to allocate to their five most important ideas, assigning five, four, three, two, or one point.

Consumers were selected by being responsible for food shopping and preparation with an equal gender representation. Consumers groups were classified in urban and rural performing 4 and 2 sessions, respectively, adding up to 49 consumers. Urban consumers were selected from the city of Barcelona. The groups were divided in high and low-rate consumers (daily or almost daily consumption of fruit vs. 3 pieces per week or less), segmenting their households by the presence (or absence) of children. Rural consumers were selected from a high specialized production town (Massalcoreig).

Stakeholders sessions were divided according to their profession. Each session included at least 10 stakeholders (n= 21 in total). The sessions consisted in FG using the World Café Technique (WCT). Introduced in 1995 by J. Brown and D. Isaacs, the WCT facilitates an open, yet intimate, discussion that accesses the views and knowledge present in a structured conversational process within a larger group of people. Its name draws upon the café ambience that is created in order to facilitate informal conversation, representing a neutral public space where people feel free to engage with each other [Brown (2005)].

For each session, participants were distributed into three thematic tables with one moderator per table. Each table was designed to gather information about our main topics of interest: (1) identifying fresh fruit

consumption barriers, (2) proposing facilitators for consumption, and (3) most valued attributes. For 15-20 minutes, the participants engaged at each table about the corresponding topic. They then moved to another table following a predefined, randomized order to ensure that participants would mix amongst during the session. This rotation was repeated until all the stakeholders had participated in all three tables. The most relevant items raised at each table were then voted in a plenary session. For the voting, the same procedure as in the NGT groups was followed.

7. Results

High-rate urban consumers declare that quality and value-for-money are the main barriers to consumption. Quality is of outmost importance and it is difficult to find, since it has been declining along the years. However, they count on specialized retailers who provide high quality at reasonable prices. If having children, their consumption is also high and no difficulties were declared. The great variety of substitutive products and its convenience, plus the perishable nature of fruit were also pointed out as barriers. To increase consumption, they point out the improvement of quality as a central aspect.

Low-rate urban consumers also declare quality as a central barrier. However, their discourse is also centred towards the lack of habit, and consumer convenience becomes more prominent. They self-report laziness for the need of peeling and preparation, acknowledging that price is not the barrier. In spite of being aware that fruit has health benefits, they are no fruit lovers, and they lack the will for self-imposing. As a facilitator, they emphasize the importance of publicity campaigns, which are lacking. Increasing convenience could also be a facilitator. Fruit ready-to-eat presentations, however, may not be the solution. Since many of them do not eat desserts, the introduction of fruit snack between meals would be the best occasion for this target.

Rural consumers highlight substitutive products and convenience as the main barriers for fruit consumption, in spite of being less healthy. Its consumption is boosted thanks to the publicity, which is much lacking for fruit. Besides, educational campaigns addressing health benefits from fruit consumption are also lacking, which is an aspect pointed out by all groups. Regional indications should be reinforced, portraying its quality but also the social benefits for the sector.

The lack of time of our modern societies is claimed as a barrier in all groups. For this reason, some consumers claim that increasing fruit accessibility out of home would increase consumption.

Restaurateurs point out quality as the main barrier for consumption. As with consumers, they associate quality to seasonal fruit and the adequate point of ripeness which, in turn, is related to proximity (local productions). Convenience is also a prominent driver for consumption. Consumers greatly accept restaurant-made ready-to-eat fruit, showing that preparation is of high importance. Nevertheless, fruit preparation is not such an easy solution for restaurateurs as fruit oxidates easily, and it needs to be prepared on demand. Its perishable nature is also a handicap. They propose educational campaigns to increase fruit consumption, insisting on the importance of school campaigns but together with education in the household. Furthermore, they highlight the success of fruit brands in the market, which have constituted a quality indication for themselves and their consumers, adding value to their menus. Nevertheless, as many consumers visit the restaurant for a special occasion or self-indulging, fruit has difficulties to compete with other kind of desserts. Thus, creativity is a must, and the restaurateur needs to find attractive ways to incorporate fruit on their menus.

Wholesale distributors state that consumption health drivers have favoured their business. Fruit most valued attributes have changed with the times: visual attributes are the most important attributes for consumers (although they may deny it), while durability comes second. This last has caused fruit being harvested every time earlier (too much before its ripening point), which explains a lower fruit quality today. Different marketing channels prioritize different fruit attributes. Supermarket chains and large retailers prioritize the visual aspect. However, this is recently changing as quality must go along too to increase their sales, as satisfaction is required for repurchase. The origin of the product is also an important attribute for consumers. Accordingly, it should be always shown on the point of sale. Related to substitutive products, distributors find that consumers appreciate them because they provide certain valued attributes that fruits cannot provide. They also agree that price is not a barrier for consumption.

To increase fruit consumption, publicity is key. Accordingly, fruit brands have increased their sales in comparison to others. Public campaigns enhancing health benefits from fruit consumption should also be promoted. Consumers' lack of information is associated to the current marketing channels. As increasing proportions of fruit are sold in self-service channels, no direct prescribers are to be found. Prescribers play an important role informing and orienting consumers in their purchases, besides stimulating sales. Increasing accessibility is suggested to increase fruit consumption, pointing out innovative snacks. However, they do not believe in innovative fruit ready-to-eat presentations.

8. Conclusions

Barriers for fruit consumption are multifactorial. Value for money and fruit quality are detected as the main barriers. Convenience is also of great importance, including the discomfort of fruit preparation. These combined with hectic lifestyles and substitutive products has developed in a change of habits. Fruit's perishable nature and the lack of information about fruit health benefits also are pointed out.

To increase consumption there is a need of improving the sensory and organoleptic quality of the fruit. Flavour is essential for consumers, and they link this attribute to the proximity of the product and the seasonal fruit. Reducing the ripening time in cold storage rooms and, harvesting at the optimal point of maturity are pointed out as a solution. Promoting the existing quality indications, emphasizing proximity could generate a higher product valuation in the consumers' eyes. Raising consumer awareness about the health benefits of fruit consumption is also considered essential. In this sense, advantage should be taken on the growing demand for healthy products. Another suggested measures are a better access to the product (out of home), recuperating the figure of the prescriber (advice, information and motivation), disseminating easy and attractive recipes and introducing creativity in the restaurants sector.

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