Consumers' Perceptions
of «Made in the Alps»

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Introduction

Building on the research findings reported in «Territorial Brands' Uses of the Image of the Alps» (ARPAF Made in the Alps Deliverable 1.1), we adopted mixed methods to understand in a more nuanced manner consumers' perceptions of products from Alpine value chains.

- What do the Alps mean to consumers?
- Does the image of the Alps provide an actual added symbolic value to products 'made in the Alps'? And is this added value generalizable to all product categories?
- What are the actual consumer responses to products 'made in the Alps', in terms of attitudes and willingness to pay? Are there differences between artisanal and industrial products?
- Do products from 100% local value chains are better perceived than products 'made in the Alps' from non-local ingredients? What about products made with local ingredients, but processed elsewhere?

The first step of the analysis was carried out through in-depth interviews, in collaboration with the EUSALP Youth Council.

- Overall, 23 infomants from different regions of the Alpine space were interviewed. Rich narratives about the Alps and products from Alpine value chains were obtained also thanks to a photo-elicitation technique.
- We are grateful to the EUSALP Youth Councilors Achille Riberyon, Aljon Kerec, Giulio Bernasconi, Leila Izard, and Timothy Sung for their availability and professionalism in carrying additional interviews that have enriched the data gathering and extended the interview sample.

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The second step of the analysis involved quantitative studies, carried out to assess consumer responses to Alpine products:
- 9 studies were carried out, involving more than 1,000 consumers of different ages and nationalities.
- 2 surveys through snow-ball sampling have been conducted to measure the consumer image of the Alpine region and Alpine products.
- 7 experimental designs have been conducted to achieve a fine-grained understanding of the factors that affect consumers' evaluation of Alpine products.

Our study raises important policy and managerial implications for territorial branding in the Alpine macro-region.
- The Alps have a rather positive and attractive 'Romantic' image, which especially benefits traditional, artisanals and agri-food products. Other typologies of products might however be somewhat penalized from the image of the Alps, which is grounded in the past, shaped by tourist experiences, and over-simplifies the technological innovativeness of Alpine value chains.
- Consumers tend to think of Alpine products in binary terms (local/non-local). They have limited awareness of the complexity of Alpine value chains, mixing local and non-local raw materials and processing.
- Our research findings show that there can be different approaches to territorial branding in the Alpine regions: not only the 100% Local model supported by previous initiatives, but also a 'Made in' model underscoring the place of production and the relatively little diffused 'origin of raw materials' approach. Each of these place branding approaches have strenghts and weaknesses, and need to be adapted to local conditions and value chains.

Consumers' Perceptions of 'Made in the Alps'

1. Insights from a qualitative analysis in collaboration with the EUSALP Youth Council

Methodology

This qualitative analysis is based on N=23 in-depth interviews with young consumers from different regions of the Alpine space.
- 10 were realized by Diego Rinallo (emlyon business school), Erik Logar (ZRC Sazu), and Paola Gioia (Kedge Business School).
- After following a methodological training, 5 EUSALP Youth Councilors interviewed another 13 informants. Their involvement and professionalism is here gratefully acknowledged.
- Interviews were carried out mostly online and in the native language of informants. They were video or audio recorded, and then automatedly transcribed.
- Data analysis and interpretation were carried out by Paola Gioia and Diego Rinallo.

Interviews were aided by a photo-elicitation technique. Informants were asked to bring a collection of pictures representing the Alps and products from Alpine value chains, which were then discussed (see Figure 1).
- Photo-elicitation allowed informants to obtain richer narratives about the Alps and Alpine products. This improved the data quality. Informants were offered the possibility to bring to the interview own pictures and/or images downloaded from the Internet.
- Interviewers had available an additional set of photographies, selected to bring to the table themes that informants would not be otherwise addressed based on the informants' own selection of pictures. In this manner, important elements that were not 'top of mind' were also investigated.

What follows is an analysis of key themes emerging from the analysis.
- As common in reporting interview-based research, we often underline main findings through informant verbatims.
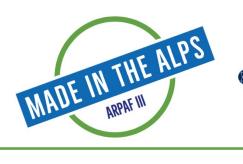
Consumers' Perceptions of 'Made in the Alps'

Figure 1.1 – Example of pictures used for photo-elicitation

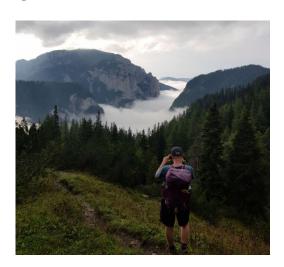**Consumers' Perceptions of 'Made in the Alps'**

The image of the Alps: positive connotations

In the Alps, one can restore oneself from the stress of the ever-crowded cities, thanks to a calmer rhythm and beautiful views.

In the Alps, one can experience a sense of community

The Alps are a place of freedom, exploration, adventure, connection with oneself and communion with nature.
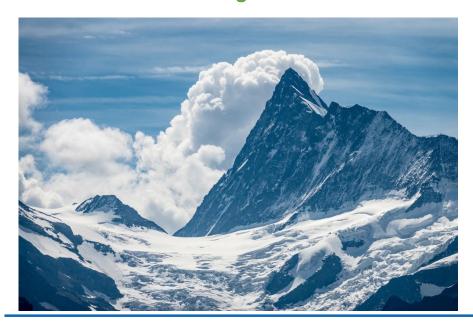

Consumers' Perceptions of 'Made in the Alps'

The colors of the Alps

The white of mountain peaks, the green of meadows and forests, the blue of the sky, and sometimes also the bright colors of the mountain flowers.

Consumers' Perceptions of 'Made in the Alps'

The sounds of the Alps

Various sounds were mentioned, above all the flowing water of Alpine streams and rivers, the wind blowing across the trees, and the sound of cowbells.

- "The rushing water of the Mountain stream that is one of the sounds in my opinion most present in the mountains. There is that feeling of speed, of hurry and freshness".
- "Quietness and the sound of the wind. Wind blowing in the trees and maybe a sound of a bird by up in the mountains."
- "The beauty of cowbells that you can recognize and hear even without seeing them."

Despite the abundance of sounds in the Alpine landscapes, the Alps also evoke silence in city dwellers.

- "I don't hear any sound. It feels very, very peaceful and quite".
- "You don't hear the noise of the city, you don't hear the cars, you don't hear the shaking, let's say, you don't hear the barking of the dogs, and there are many other sounds that maybe are more disturbing in the city, but even if you hear them [here] you would somehow take them as part of nature and they would seem more natural to you than here in the city."

Consumers' Perceptions of 'Made in the Alps'

The scents of the Alps

Informants associate various smells with the Alps - some pleasant, others less so.
- "You can smell the trees, the earth… You smell nature there [in the Alps]".
- "Very fresh, grassy smell. The smell of a forests, nature, animals and excrements... I think first of all of the smell of fresh air".
- "The smell of fir wood, the smell of pine trees, of resin . . . Above all I must say [the smell of] the trees".
- "It feels very fresh. I can't really describe it. It's very hard to describe this flavor of just being surrounded by nature, the trees and the flowers, we could smell a lot of different things".

City dwellers contrast the perfume of the Alps with the absence of the unplesant smells of the urban environment.
- "You don't smell the exhaust fumes, you wouldn't smell the rubbish, [only] some clean air that would calm you down. And then there are those smells from nature".

Consumers' Perceptions of 'Made in the Alps'

The Alps are perceived as a romantic environment, whose image has been shaped by tourist experiences.

Historically, the Alps have not always had a positive image. Only with the diffusion of Romanticism's ideals they started being appreciated, explored, ultimately becomining associated to pristine nature and a refuge from the chaos of city life.

- Pilgrims, merchants and other travellers have long crossed the Alps, which were however considered as dangerous and terrifying. During the 19th century, Romantic transformed the perception of the Alps into one of a beautiful and pure wilderness. As cities faced chaos and filth, the Alps became a sought-after destination for those in search of pristine landscapes and health resorts with thermal waters and clean air.

- The late 19th century brought additional familiarity, thanks to travel guides and improved railroads. Explorers' conquers of Alpine peaks inspired admiration and Alpine clubs, with their network of shelters and trail, further increased accessibility, turning the Alps into a must-visit for the affluent.

- Post World War I, skiing's popularity added to the allure of the Alps, featured prominently in films and popular culture. After World War II, with the rise of the middle class and mass tourism, the Alps became an increasingly popular destination. The romantic image of unspoiled nature and tradition continues to define the Alps, even as the reality is often different.

Figure 1.2 – «The wanderer above the sea of fog», c. 1818, by the German Romantic painter Caspar David Friedrich

Consumers' Perceptions of 'Made in the Alps'

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MADE IN THE ALPS
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Despite positive associations with nature and tradition, the Alpine landscape is perceived as fragile due to the climate crisis.

Many informants show signs of climate anxiety. Some of their considerations are 'dark green', emphasizing the need to preserve nature for its own sake. Others are worried about the economic consequences of climate change, notably on winter sport industries. Still other are caught between their environmental sensitivities and their desire to keep enjoying the Alps.

«What we can do after the glaciers will be melted?»; «Glaciers, they're melting. Very, very fast»; «It makes me sad to see how much it's melted and how much nature has changed in the last few years».

«I am a big fan of skiing but at the same time, I recognize the threats that climate change posed to the ski industry and whether it's sustainable to keep building these lifts when maybe in 10 years or so or maybe even sooner there will be not snow to ski», «such lifts are such a big intervention on nature in terms of biodiversity that it may not be worth it at all in terms of the joy that people get from it and also the economic benefits that may bring or may not bring in some cases».

«I want to protect the mountains and I think that some places should be completely natural and without any human activity. But at the same time, I still like my comfort and I still like the Alps for what they propose, for example during winter. So like the activities such as skiing».

«There is less and less snow, which will also potentially affect the water, not above the amount of water that comes into the lowlands, which is generally just a bad no. From that point of view, it is. For the needs of existence or to enjoy tourism».

«Maybe in a couple of years there will be no snow anymore, which is kinda of sad because, as I said, in my imagination, the Alps are also associated with what they are in winter and so the snow and, more than skiing, the mountains under the snow. It's just very beautiful and it's again very fresh air and very different from what we experience in our daily life, so it's still important to preserve this kind of moments and this situation».

Consumers' Perceptions of 'Made in the Alps'

Products associated with the Alps

Mostly, the products associated with the Alps are those coming from agro-food chains.
- Milk, cheese, and other dairy products
- Alcohol (schnapps/spirits, bitters, wine)
- Honey (flowers → bees)
- Meats (charcuterie, hunting)
- Herbs, herbal teas, spirits based on herbs
- 'Greesy food' after ski
- Some even mention (milk) chocolate.

Wood and wood crafts are much less 'top of mind', but emerge thanks to the photo-elicitation.
- Furniture, when mentioned, is in traditional style. Wood chalets are also mentioned.
- Some informants have mixed feeling about 'cutting trees', which is perceived as a way of exploiting nature.

Textiles products are hardly spontanously mentioned.
- Sheep are mostly linked to food production than to wool and textiles. Other natural fibers, such as flax/liner or hemp, are never mentioned. Skiwear and outdoor clothing is not considered 'made in the Alps'.
- Some mention "grandma's jumpers" or traditional costumes like dirndl "worn by nostalgic or nationalistic people during summer festival" or the Octoberfest.

Technological products are never mentioned, except ski lifts or hydro-electric energy infrastructures.

Consumers' Perceptions of 'Made in the Alps'

The price of Alpine products

Alpine products are perceived to be expensive for many reasons – but their cost structure is different compared to mass-produced products in other areas.

- Alpine products are perceived to be artisanal/handmade, produced in small quantities without benefitting from economies of scale, and made with more expensive and locally sourced raw materials/ingredients. They are also produced by small firms (sometimes family businesses).
- They are more difficult to find (scarsity effect) and often sold directly by farmers/producers or through short circuits.
- While more costly to produce, their price does not include the margin of commercial intermediaries and the huge promotional/marketing costs of industrial products.

The high price of Alpine products means that not everybody can afford them. Additionally, not everybody can understand their value and perceive how they differ compared to industrial products.

- "I see that the biggest problem . . . is the economic barrier", "it's clear that the biggest problem is the economic one . . . there clearly is an economic barrier." "[often] local products cost much more than others ... so when you want to save money . . . sometimes to pay less you buy other things, however, I'm not proud of it."

"There is usually a price difference that drive the consumers to buy the cheapest products and the cheapest products are most of the time not locally made, but most of the time comes from a factory that produces mass production to reduce the cost. Obviously we cannot decrease the prices of Alpine products because they're real people behind it that have to earn and living…".

They high price means that they are 'for special occasions', 'a luxury', or, for tourists, a souvenir to bring back home.

Consumers' Perceptions of 'Made in the Alps'

The sustainability of Alpine products

Despite their perceived high cost, informants mention several reasons to buy Alpine products, linked to better quality or greater socio-cultural and environmental sustainability.

- Better quality, particularly in the case of food: the better taste is linked to Alpine productive landscapes. For example, Alpine cheese is obtained from the milk of 'happy cows' grazing grass on high-mountain pastures.
- Quality is also linked to less industrial/more artisanal production methods (hand-made effect).
- Thanks to short circuits, buying these products permit to be in touch with passionate and charismatic farmers and artisans/producers.
- Purchase permits to support local farmers/producers and keep local jobs. It also permits to support local traditions and know-how at risk of disappearing.

The place of production is however difficult to disentangle from the place of origin of ingredients or raw materials.

- Alpine products are implicitly perceived to be entirely made locally with local ingredients. Most informant think in binary terms, contrasting local products with non-local ones.
- The complexity of Alpine value chains, mixing local and non-local raw materials and stages of the production process is hard to conceive.
- Perceptions over products made locally with raw materials from elsewhere, or made with local raw materials but processed outside of the local area where difficult to obtain with qualitative methods.

Despite their sensitivity to sustainability issues, informants never mention circularity.

- In our entire dataset, we only find a references to "materials that come from where the people live".

Consumers' Perceptions of 'Made in the Alps'

Conclusion

The image of the Alps is positive and attractive (Fig. 1.3).

- Romanticism's notions of pristine, wild, and pure nature untouched by modernity are still present in informants' narratives of the Alps. The Alps are a place where one can be in touch with oneself and nature, experience a slower pace of life and live rewarding experiences.
- Like all images, the Alpine image is inertial (grounded in the past rather than the present) and over-simplifies the complexity of life in the Alps. The Alpine image is to a great extent shaped by tourist experiences and contrasted with the chaos and noise of urban life.

The image of the Alps connotes the image of (some) products from Alpine value chains.

- Alpine products are perceived to be of good quality, artisanal/hand-made, environmentally sustainable and grounded in traditional knowledge. They are considered more expensive, but with a different distribution and cost structure (short circuits, more limited intermediation costs and promotional investments).
- Buying these products is an act of social and environmental responsibility and is 'the right thing to do'. Informants however feel that they cannot always afford these products, experiencing inner conflicts about this. Alpine products are sometimes luxuries that can be indulged in special occasions only (gifts, souvenirs, self-indulgence).

Agrifood products are 'top of mind' in consumers' perception. Overall, the Romantic image of the Alps does not benefit technologically innovative or aesthetically innovative products.

- Products from textile, wood and other traditional value chains were seldom evoked.
- Overall, such is the emphasis on tradition that innovation – whether grounded in technology or style innovation – is hardly associated to the Alps.
- Informants thus simplify the variety of Alpine value chains and their innovativeness. There is also limited awareness of their complexity, as Alpine products are implicitly considered 100% local.

Consumers' Perceptions of 'Made in the Alps'

Fig. 1.3 – How the image of the Alps connotes products 'Made in the Alps'

Image of the Alps

Positive, attractive

Romantic = pristine and pure nature, untouched by modernity

The complexity of the Alps is simplified by those who «consume» the Alps through tourist experiences

Image of products «Made in the Alps»

Alpine products are perceived to be:
- Artisanal/hand-made
- Environmentally sustainable
- Grounded in traditional know-how
- More expensive, but with a different cost structure.

Agrifood products are top of mind.

The Romantic image does not reward innovation

Consumers' Perceptions of 'Made in the Alps'

2. Insights from quantitative studies

Methodology

Our quantitative analysis is based 9 studies involving 1,049 participants resident in Alpine and non-Alpine European countries thrugh convenience sampling procedures.

- The studies were conducted under the supervision of Marta Pizzetti (emlyon business school). They were designed by Marta Pizzetti with the help of Diego Rinallo (emlyon business school) and Diletta Acuti (University of Bath).
- Studies were conducted online, through the use of Qualtrics for the management of the questionnaire tool, in English or the native language of the participants (i.e. Italian for Studies 2 and 4; French for Study 3).
- Data analysis and interpretation were conducted by Marta Pizzetti and Diletta Acuti.

Exploratory surveys were conducted to gather an initial understanding of the phenomenon.

- Survey development and data collection were conducted as part of a student in-class assignment under the supervision of Marta Pizzetti (see p. 24 for results).

Experimental designs were scenario based studies – a short text describing a product was provided to the participant who was asked to assess it [see next page for an example]

- Scenarios are commonly used in experimental designs to minimize recall bias and boost the internal validity of the study – i.e. minimizing the influence of external non controllable variables.
- Attention and manipulation check were included to guarantee the reliability of the data and the effectiveness of the manipulations.
- The 7 experimental designs involved participants from the Academic Prolific panel, who were rewarded for their participation to the study (on average £0,7 per study).
- Consumer responses were measured with ad hoc created questions and validated scales of questions from the literature.

Consumers' Perceptions of 'Made in the Alps'

Experimental scenario – Illustrative example from study 3

"Fleur de fromage is a cheese with a rich, nutty flavour and firm texture. It is a traditional Alpine cheese made with a know-how that has been passed down for generations. This cheese can be melted on top of dishes such as potatoes or bread, or grated and used as a topping for soups and salads. It is also an excellent addition to charcuterie boards and pair well with wine, beer, or other fermented beverages.

The milk for the Fleur de fromage is sourced from cows that graze on the **high-mountain pastures in the French Alps (vs. graze in French lowlands fields)**, *which gives the cheese its unique flavour and character. Fleur de fromage is made and aged* **in dairies located in French Alps (vs. in dairies in located in several French regions)** *using the traditional Alpine cheese-making methods."*

For each experiment, scenarios were created ad hoc to manipulate the variables under investigation – in the scenario here above (i) origin of the ingredient and (ii) place of production. Manipulation occurred via the change of short sentences – here identified in bold – which varied according to experimental conditions. In brackets you will find the phrases used to manipulate the non-Alpine origin of ingredients and non-Alpine production. Next slides illustrate how experimental designs were built.

Scenarios were inspired by AI and communications of real Alpine products. The use of fictitious brands aimed to minimize the bias due to previous knowledge or experience with the brand. To increase scenario credibility, participants were told that the brand is existing but concealed for privacy reasons.

Consumers' Perceptions of 'Made in the Alps'

Experimental design: illustrative example of the design

Our studies involved the manipulation of independent variables to test the effect of place of production and/or origin of the product materials on consumer's responses. The table below illustrates the mix of two independent variables, visualizing the manipulations done for studies 2, 3 and 4.

IV 1: INGREDIENT ORIGIN

	Alpine	NON-Alpine
Alpine	Ingredients are from and production happens in the Alpine region	Ingredients come from a non-Alpine area but they are processed for product production in the Alpine region
NON-Alpine	Ingredients are from the Alpine region but they are processed and the product produced outside the Alpine region	Ingredients come from and are processed in a non-Alpine area

(IV 2: PRODUCTION PLACE shown on left axis)

2(ingredient origin: Alpine vs. NON-Alpine) x 2(production place: Alpine vs. NON-Alpine) between-subjects experimental design
= 4 experimental conditions manipulated through scenarios

Consumers' Perceptions of 'Made in the Alps'

Experimental designs

Our quantitative analysis involved 7 studies based on experimental design methodology:

STUDY	AIM	DESIGN	SUPPLY-CHAIN + STIMULI	PARTICIPANT RESIDENCE	SAMPLE SIZE	LANGUAGE
1	Comparing consumers evaluation of products labelled as "Made in the Alps" vs. "mountain product" vs. control group [no cue]	3(made: alpine vs. mountain vs. control group) between-subject design				
1.1			Wood (tools for the kitchen; carved wooden objects; furnitures; parquet board)	German	90	EN
1.2				French	90	EN
1.3			Food (cheese and milk, spirits, salami, herbal infusion, honey)	German	90	EN
1.4				French	90	EN
2	Understanding how the ingredient origin (Alpine vs. NON Alpine) and the production place (Alpine vs. NON ALpine) affect the evaluation of Alpine products.	2(Ingredient: Alpine vs. non)x2(production: Alpine vs. non) between-subject design	Food (Bresaola)	Italian	121	Italian
3	Understanding how the ingredient origin (ALpine vs. NON Alpine) and the production place (Alpine vs. NON ALpine) affect the evaluation of Alpine products. Replica of Study 2 in another country, with another product	2(Ingredient: Alpine vs. non)x2(production: Alpine vs. non) between-subject design	Food (Cheese)	French	202	French
4	Understanding how the material origin (ALpine vs. NON Alpine) and the production place (Alpine vs. NON ALpine) affect the evaluation of Alpine products. Replica of Study 2 in another supply-chain	2(material: Alpine vs. non)x2(production: Alpine vs. non) between-subject design	Textile (wool)	Italian	196	Italian

Consumers' Perceptions of 'Made in the Alps'

Alpine products: What do consumers recall?

Tasty alpine food
The analysis of the 'top of mind' Alpine products reveals that consumers spontaneously associate Alps with food: between the product spontaneously recalled, the 83% were food items.
More specifically, among the the first products that come to participant's mind when thinking about Alps they named: cheese (19% of recalled food products); milk (11%), alcoholic drinks (9%); water (8%); and meat (e.g., game meat; 7%).

Handcrafted wood objects
The 6,1% of the products were related to the wood supply-chain. Participants mentioned few specific products, i.e. small objects, decorations, or furniture, or simply referred to "wood" in general.

Warm wool
The textile supply-chain was also present in consumer mind, despite less relevant compared to the other supply-chains, totalling the 3% of the mentions. We found that consumers immediately recall wool when thinking of Alpine textile products, while the other textile products were fur coats, hats and sheepskin. Consumers are not aware of hemp and linen as products of the Alps.
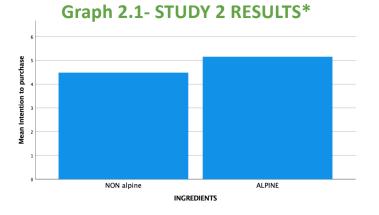
Consumers' Perceptions of 'Made in the Alps'

Alpine products: What do consumers value? (I)

The importance origin of the product:

Our studies demonstrate that consumers especially value the origin of raw material when evaluating Alpine products. Conversely, the Alpine production is less valued. When an Alpine food product contains ingredients that have been gathered from the Alps, consumers show more favourable responses compared to the same product that does not contains ingredients/raw materials from the Alps.

In Study 2 we found that the Alpine origin of bresaola meat increases of 10% the consumer attitude towards and intention to purchase the product. In Study 3, we found that a cheese made by Alpine milk increases of the 5,7% the perceived healthiness of the cheese.

Graph 2.1- STUDY 2 RESULTS*

* Graph 2.1 shows the difference between the means on participant's intention to purchase bresaola made with NON-Alpine vs. Alpine meat. Means were calculated on 1 item from Tassiello et al. (2021) on 7-point Likert scale

Consumers' Perceptions of 'Made in the Alps'

Alpine products: What do consumers value? (II)

The importance origin of the product:

We also found a similar preference for products made with Alpine raw materials for the textile supply-chain. <u>Study 4</u> shows that Alpine wool increases of about 4% the consumer's intention to purchase a textile product, such as a scarf.

Moreover, consumers value the Alpine origin of raw materials in terms of authenticity and sustainability. In <u>Study 2</u>, we found that the Alpine origin of bresaola meat increases of the 6,6% the consumer's perceptions of authenticity and of the 8,1% the perceived environmental friendliness of the product. However, we did not find the same results in the other studies on cheese and wool supply-chains.

Consumers' Perceptions of 'Made in the Alps'

Alpine products: How to communicate to consumers (I)

'Alpine claims' to communicate the origin of the product.
The four experiments of Study 1 were meant at assessing how consumer value an Alpine product compared to a generic product (i.e. no mention of the place of production) and a generic mountain product (i.e. no specification of the mountain chain).

We found that consumers appreciate knowing the origin of products and are 5% more eager to pay a premium price for products labelled as Alpine compared to generic products. There is also a slight preference for Alpine products compared to generic mountain products: our participants, declared to be the 4% more eager to pay a premium price for Alpine products compared to those more generically made in mountains.

Next slides show the results of our four experiments, in aggregate form (Graph 2.2) and between supply-chains (Graph 2.3)
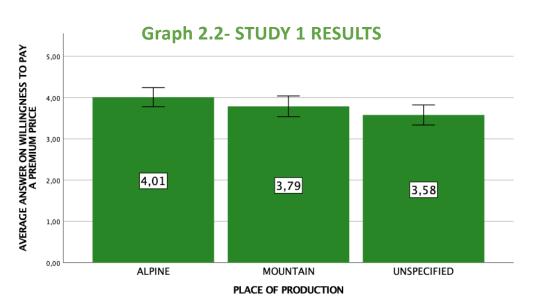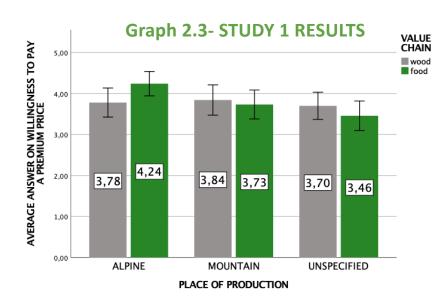
Consumers' Perceptions of 'Made in the Alps'

Alpine products: How to communicate to consumers (II)

Graph 2.2- STUDY 1 RESULTS

AVERAGE ANSWER ON WILLINGNESS TO PAY A PREMIUM PRICE

ALPINE: 4,01
MOUNTAIN: 3,79
UNSPECIFIED: 3,58

PLACE OF PRODUCTION

Graph 2.3- STUDY 1 RESULTS

AVERAGE ANSWER ON WILLINGNESS TO PAY A PREMIUM PRICE

VALUE CHAIN
wood
food

ALPINE: 3,78 (wood) 4,24 (food)
MOUNTAIN: 3,84 (wood) 3,73 (food)
UNSPECIFIED: 3,70 (wood) 3,46 (food)

PLACE OF PRODUCTION

As Graph 2.3 illustrates, the effect on willingness to pay a premium price is particularly stronger for food Alpine products: consumers are about the 7% more willing to pay a premium price compared to a generic mountain origin.
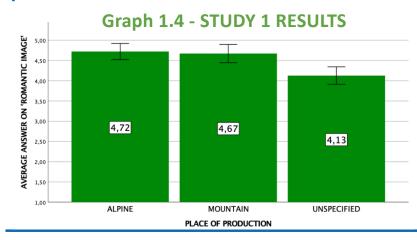
Consumers' Perceptions of 'Made in the Alps'

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research
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Alpine-origin effect: The meaning of the Alps image

Our studies also investigated why consumers place higher value to Alpine product. As also suggested by the qualitative results, consumers do have a specific image of the Alps as a «romantic place of production» that adds value to Alpine products.

We found that consumers associate an image of a «romantic place of production» to both Alps and mountain in general: they recognize such image as about the 9% stronger for Alpine and mountain products compared to products which place of production is not communicated. Such effect happens for both food and wood products.

Graph 1.4 - STUDY 1 RESULTS

Graph 1.4 shows how consumers evaluated products in terms of «romantic place of production» on a set of items ad-hoc developed through the two exploratory surveys and measured on 7-point Likert scales. The means show the average evaluation out of 7 points.

Limits of the Alpine-origin effect: Does the production place count? (I)

Despite the origin of the raw materials seems to be the most relevant product attribute for consumers, the place of production is also taken into account. We found that consumers value morethe products that are entirely Alpine – meaning that both materials and production are Alpine. For such products, consumers show an attitude that is about 4% more positive compared to other products, which only the materials or the production are Alpine.

Consumers like less those products that are manufactured in the Alpine region but made with non-Alpine materials or ingredients. In such cases, the Alpine production can be even counterproductive, generating scepticism and washing perceptions, and reducing the perceived environmental friendliness and authenticity of the product.
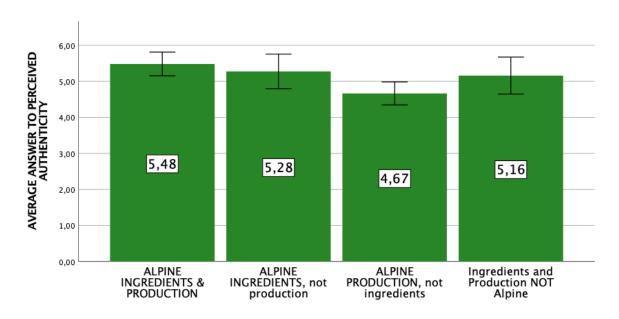
Consumers' Perceptions of 'Made in the Alps'

Graph 1.5- STUDY 1 RESULTS

The result of Study 1 show that when a product is made in the Alps with non-local raw materials, consumers feel that it is less authentic.

Authenticity matters for consumers and a lack of it compromises consumer willingness to purchase the product.

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Conclusive remarks

The origin of the ingredients seems to be the most important element for consumers when evaluating Alpine products. Consumers value the Alpine origin of the ingredients and raw materials, which is the main driver of intention to purchase and general attitude towards Alpine products.

Products with Alpine ingredients and raw materials are also perceived as healthier, more authentic and more sustainable.

The place of the production is less important for consumer. It may also generate counterproductive perceptions when the product is made in the Alps, but does not contain Alpine raw materials: consumers are sceptical about such product, for which Alpine claims can be seen as a mere marketing tactic to increase sales.

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Conclusions and implications

The Alps have a rather positive and attractive image, which connotes some products 'Made in the Alps' more than others.

Historically, this positive image of the Alps is linked to the Romantic discovery of the Alps as a place of pristine nature, untouched by modernity, where one can be in touch with oneself and escape from the crowed, noisy and polluted city life. Such attractive image, which has been shaped by Alpinism and by Alpine elite and mass tourism. These costitutive elements still linger in consumers' perceptions. Despite the fact that no label certifying product origin exists, the image of the Alps can be considered a place brand, or an intangible cultural resource available to all Alpine producers.

Alpine products do benefit from the Alps' romantic image with its natural and traditional connotations. They are considered to be of good quality, artisanal, produced in small volumes, heritage-based, environmentally friendly, and distributed through short circuits. Overall, they are perceived as the result of a different productive philosophy compared to industrial mass-produced goods. The Alpine image does not however lend justice to the complexity of Alpine products, but with all its pros and cons it can be used to promote products from Alpine value chains.

Specifically, products from agri-food value chains are 'top of mind' in consumers perceptions. Visible elements of the Alps' cultural landscapes, through a chain of cognitive associations, are associated to a better taste (Alpine flowers → better honey; cows grazing grass on pastures → better milk and cheese).

Territorial Brands' uses of the image of the Alps

Other products from traditional value chains are less prominent in consumers' perceptions. For example, sheep (less visible than cows) are not automatically associated to wool, and Alpine style in clothing is associated to old-fashioned/retro costumes, such as dirndl or lederhosen (and much less to skiwear and outdoor technical clothing). Wood is more present than textile value chains due to the omnipresence of forests, yet tree cutting evokes negative associations to environmentally sensitive consumers and products mentioned are limited to mountain furniture and interior designs, and chalets. The strong link to tradition makes it difficult to associate the Alps to technologically innovative products or non-traditional aesthetics.

Consumers tend to think of Alpine products in binary terms (local/non-local). They have limited awareness of the complexity of Alpine value chains, mixing local and non-local raw materials and processing.

Products 'made in the Alps' are perceived as being 100% local. Thanks to experimental research designs, we investigated perceptions on different combinations of ingredient origin and place of production. Overall, we found that the origin of raw materials is an important driver of consumer response. This also extends to products based on local ingredients but processed elsewhere.

Products 'made in the Alps' from ingredients from elsewhere can instead trigger negative perceptions, particularly when these ingredients can be locally available. These products are perceived as less authentic.

Territorial Brands' uses of the image of the Alps

Our findings show that the 100% Local model can co-exist with other approaches to place branding in the Alpine space (see Fig. 3.1).

The **100% Local** approach has been the object of previous EUSALP initiatives. Many territorial brands adopt it, emphasizing that all ingredients/raw material and all stages of the production process are local. This approach can benefit regions as it can lead to local collaboration, joint innovation, and re-introduction or revitalization of traditional crops. At the same time, however, this approach can hinder inter-regional or cross-border collaboration as external inputs or skills are substituted with local ones. The 100% Local approach is easy to communicate to consumers, but might be difficult to implement when not all local resources and competence are available in sufficient quantities or adequate quality.

The product specifications of many territorial brands also adopt a **Made In** approach to place branding for products that are locally processed with non-local input. Usually, a minimum % of the added value or the ingredients must be certified as local. The distinction between the 100% Local and the Made In model reminds the difference between Protected Denominations of Origin (PDO) and Protected Geographical Indications (PGI), as the latter require local processing in important phases of the production process but allow for ingredients of non-local origin. A Made in approach can be adopted to include in territorial branding initiatives local producers whose products require non-local inputs or to give them the time to adapt their procurement practices. It can also benefit successful products whose demand exceeds locally available resources. Consumers might however be skeptical of these products, particularly if local raw material are available.

Territorial Brands' uses of the image of the Alps

The **origin of raw materials** approach is atypical for territorial brands in the Alpine areas. It permit to valorize local resources when complementary input and skills are not locally available. An example in point is textile fibers such as flax or wool, which are locally produced in many Alpine regions, but whose value chains are complex and require territorial specialization at the international level. This approach to place branding can result in territorial cooperation, also across national borders. Consumers might respond favorably to products and brands valorizing local resources.

We thus recommend that territorial brands in the Alpine region consider all these approaches in their product specifications, adapting that to specific local conditions and value chain considerations.

Our study also show that, to some extent, the Alps connote products better than a generic 'mountain' origin.

Unsurprisingly, the Alps' image overlaps with the general perception of mountains. Our results may thus be somewhat applicable to products from other mountain ranges, like the Pyrenees or the Carpathians. While no official Alpine label exists, the EU introduced an optional quality mention for 'mountain products' in 2012. However, some EU states have yet to implement this regulation at the national level. Our findings suggest that this mention could influence consumer responses, including willingness to pay. For producers in Alpine regions, emphasizing the Alps' image instead of a broader mountain origin may have a more significant impact on consumer responses in certain cases. Further research is necessary for conclusive findings on this matter.

Territorial Brands' uses of the image of the Alps

Fig. 3.1 – Possible approaches to place branding in the Alpine space

«100% Local» approach

- Place branding based on 100% local value chains: products are entirely made locally from local ingredients. Possible when all raw materials and processing competences are or could be locally available.
- Approach emphasized in previous EUSALP initiatives. It does not require inter-region or cross-border collaboration.

«Made in» approach

- Place branding highlighting the place of production rather than the origin of raw materials/ingredients, that can be non-local. Suitable when local inputs are not available in sufficient quantity or quality.
- The difference between the 100% Local and the Made In approach reminds the distincion between the PDO and PGI in geographical indications. Territorial brands might require minimum % of local value added or ingredients.

«Origin of raw material» approach

- Place branding based on the local origin of raw material, which are partially processed elsewhere. Possible when local raw materials are available, but complementary resources and skills are not.
- Atypical approach for territorial brands, which favor the «100% Local» or the «Made in» approach. It can permit to valorize local resources benefitting from the territorial specialization of other areas, thus resulting in better quality or reduced production costs.

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