Quality Irish Regional Products and Services: their Promotion and Marketing

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Edited by Mary Cawley

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Regional Images and the Promotion of Quality Products and Services in the Lagging Regions of the European Union (RIPPLE)

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Foreword

As part of an ongoing response to the 1992 reform of the CAP and the 1993 GATT agreement, the European Commission (EC) provided support for research on the development of new markets, products and processes for agricultural and related resources in the lagging regions of the Union. In the late 1990s, the research reported here was funded to explore *Regional Images and the Promotion of Quality Products and Services in the Lagging Regions of the European Union* (RIPPLE). The project formed part of an international study conducted at leading universities and rural research institutes in Finland, France, Greece, Ireland, Spain and the United Kingdom, and was conducted between March 1997 and July 1999. The survey work was conducted during 1998 and 1999. This text is a condensed version of the *Final Regional Report: Ireland* (Cawley *et al*., 1999) compiled at the end of the RIPPLE project in 1999. Several research papers, reports and a monograph have been published and made available to practitioners and policy-makers, following the completion of the research, and these are listed in the Bibliography under the relevant authors' names. These publications deal with individual components of the research. Because the central concerns of the research continue to assume priority in EU rural development policy and because the issues investigated remain under-explored in an Irish context, it seems timely to make the findings available in a single document. It is hoped that the summary results presented here will be of interest to practitioners and policy makers as well as to academics.

Several of the concerns and objectives expressed in the conclusions to the Second European Conference on Rural Development, held in Salzburg in November 2003 (EUROPA 2003), were addressed in the RIPPLE research. In particular, the Salzburg conclusions referred to the increasing importance attributed to 'the quality of food', 'the need to help European farmers take up their multifunctional role as custodians of the countryside and market-oriented producers in all of the EU including disadvantaged areas and remote regions' and the need to generate 'new employment opportunities, particularly for young people and women'. A key objective arising from the Salzburg Conference is to create 'a living countryside' and diversification both within and beyond the agricultural sector is viewed as being indispensable towards this end. So also is partnership between public and private organisations and civil society in line with the principle of subsidiarity. The RIPPLE project addressed all of these issues and also focused in particular on the link to place of production which is viewed by both the EC and the OECD (1995) as providing niche opportunities for small-scale quality producers who cannot compete on the basis of economies of scale. It is hoped, therefore, that the results presented here will contribute in a useful way to contemporary discussions relating to the future of rural economy and society.

In Ireland, the research partners during the RIPPLE project were: the Department of Geography, National University of Ireland, Galway (NUI, Galway), of which Professor Desmond A. Gillmor of Trinity College Dublin was a member; the Rural Economy Research Centre, Teagasc, Sandymount Avenue, Dublin; and The National Food Centre, Teagasc, Dunsinea, Dublin. All laboratories contributed in various ways to the development and conduct of the research, the analysis of data and the writing of reports. The Department of Geography, NUI, Galway and the Rural Economy Research Centre had responsibility for the components of the research relating to the businesses and institutions and The National Food Centre was solely responsible for the consumer component.

The authors of this publication are listed in alphabetical order. Details of their institutional affiliations and research interests are given in the Notes on Contributors.

Acknowledgements

The research on which this publication is based was conducted as part of the RIPPLE project (*Regional Images and the Promotion of Quality Products and Services in the Lagging Regions of the EU*) FAIR3-CT96-1827. The research was conducted in two lagging regions, in each of six countries of the EU, one of which was less developed than the other. The participating laboratories were: the Departments of Geography, Coventry University, University of Lancaster and University of Leicester, UK; the Department of Agriculture and Food Economics, Scottish Agricultural College, Aberdeen; the Institute of Rural Studies, University of Wales, Aberystwyth; the Departments of Geography, NUI, Galway and Trinity College Dublin; the Rural Economy Research Centre, Teagasc, Dublin and The National Food Centre, Teagasc, Dublin; the Department of Economics, University of Patras, Greece; the Department of Geography, University of Valencia, Spain; CEMAGREF, Aubière and the Département Qualité et Économie Alimentaires, ENITA, Clermont-Ferrand, France; the Institut d'Administration des Entreprises, University of Caen, France; Seinajoki Institute for Rural Research and Training, University of Helsinki, Finland. Professor Brian Ilbery of the Geography Division at Coventry University was co-ordinator of the RIPPLE project.

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Table of Contents

List of Figures

List of Tables

Executive Summary

Research Objective and Context

The general objective of the RIPPLE project was to help public and private institutions develop strategies, policies and structures to aid the successful marketing and promotion of quality products and services (QPS) in the lagging regions of the EU. Towards this end, research was conducted in two Irish regions: the Northwest (a composite region incorporating counties Leitrim, Roscommon and Sligo) and the Southwest (County Kerry and West Cork). Both study regions were characterised by features of social and economic disadvantage, the former to a greater extent than the latter. Niche rural-based product and service development was a feature of both. The research focused in particular on hand crafts, speciality foods, processed fish, organic food produce and rural tourism services.

Since the late 1980s, additional investment in infrastructure, agriculture and economic activity more generally took place in association with the allocation of increased EU Structural Funding to Ireland. Rural development assumed new prominence as a clearly articulated policy objective in national development programmes and in national development plans funded by the EU, during the 1990s. Area-based, integrated and multi-sectoral approaches were introduced. At an EU and OECD level, quality products and services which gain niche status from their associations with the physical, cultural and social features of their areas of origin were identified as having a role to play in the economy of lagging regions. This research addressed the potential for this contribution in Western Ireland.

Research Tasks and Results

To achieve the objective of the project three particular issues were explored which related to:

A. Constructions of quality as a distinguishing product attribute, links to place and the use of regional imagery in promotion and marketing
B. Regional factors which contribute to successful innovation
C. The frameworks necessary for successful promotion and marketing

In conducting these tasks interviews were held with samples of 166 producers of QPS, 42 organisational representatives and 397 consumers during 1998 and 1999.

A. Quality and Regional Imagery as Marketing Strategies

Constructions of quality

'Quality' is recognised as a feature that is socially constructed and, therefore, highly contested and requiring definition in particular contexts. The research sought to identify the perception of quality by producers (including tourism providers), organisations (the institutional context) and consumers and its potential role in conferring a market niche. A close alignment was identified between consumer and producer perceptions of what constitutes quality but there was some disparity between producer and institutional perceptions. Many producers viewed unofficial certification, associated with quality producer and marketing groups, citations in recognised guidebooks, and reputation as being more important than official certification. Organisations defined quality in the broader terms of meeting regulatory requirements. Many producers viewed these statutory requirements as a minimum threshold that should be exceeded. This was more closely aligned to consumers' views that 'attraction' was the most significant indicator of quality. Customer care and service were considered to be part of this intangible but important quality characteristic.

Both producers and consumers identified traceability to producer and region as important quality criteria. Producers and organisations concurred in highlighting methods of production as being of considerable importance. There was a lack of awareness among consumers in this regard, pointing to a need for consciousness-raising. Producers diverged widely from the other two groups in assigning low importance to presentation.

Linking quality to region of origin

For a majority of the producers surveyed, the quality of their products and services derived primarily from the materials used and from their own skills, interest in and dedication to their business. Links between quality and region of production were less emphasised but, nevertheless, such links were made. An exception was organic food produce, where organisations said that the **method** of production was of paramount importance.

Most products marketed overseas by national organisations are marketed as quality **Irish** products rather than with reference to their sub-regional designation. The promotional materials used by the surveyed businesses invoked a range of quality-linked associations with: the purity of water, air and grass-based livestock production (for fish and food products); craftsmanship and tradition (in the case of crafts); and aspects of the physical, cultural and social environment (landscape, history, heritage and friendly people) in the case of tourism products.

The Regional Tourism Authorities, the rural tourism co-operative organisations and product marketing groups (PMGs) differed from the national organisations by invoking associations with sub-regions of production in both their overseas and home marketing of many tourism products. Certain products acquired their niche quality status from actual locations (links golf courses, game and freshwater angling, hill walking and climbing, water sports). In West Cork, the LEADER-assisted Fuchsia Brands Company deliberately used regional imagery to establish a quality branding initiative for both tourism and food products.

In food and organic production it may not be in the interests of producers to differentiate further between products. Because of their relatively low numbers, their main challenge is to establish markets in competition with conventional producers, rather than competing among themselves.

Ireland as a whole was identified as the main region of production by consumers but awareness of regional and local products was present. Products were, however, generally identified by brand name or by producer. Crafts and food were the main quality products associated with the regions. Not surprisingly, residents displayed a higher level of awareness of such products than extra-regional consumers.

Constructing regional imagery

It is recognised that the role of regional imagery is likely to be less significant in a small country such as Ireland, with a limited domestic market and lacking clearly defined and perceived regions, as compared with, say, France. Nevertheless, study of the use of regional imagery in the Irish context is clearly merited because of its growing importance as a stratagem in promotion and marketing internationally. Tourism producers made effective use of regional imagery in promotion and marketing. Food producers tended to use local place names in labelling their products, whilst food and crafts organisations were more likely to use national images. Individual crafts producers invoked imagery as features of their products rather than in promotion *per se*.

The influence of regional imagery on consumer purchases appears to be secondary to aspects of quality. There was a perception of Ireland as a region of production of QPS. Little awareness of regional quality-linked branding initiatives in the two study regions was captured in the survey of consumers but this may be related to the newness of the initiatives.

B. The Types of Regional Environment which Encourage Innovation by SMEs in the Production of Regional QPS

The producers and institutional representatives were asked about their perceptions of the regional features that encouraged innovation in the production of QPS. In the Northwest, private inward investment by immigrants, attracted by the quality of life, and by returning emigrants was viewed as contributing to the development of organic food production and crafts. In the Southwest, similar inward investment was mentioned in the context of crafts. Inward private investment in large hotels and other attractions was viewed as being important for tourism more generally, as smaller businesses tend to benefit from these. Such investment was not seen as important by the food organisations in this region, in contrast with national food and fish organisations.

The main factors reported as contributing to innovation in the Northwest were education and training, competition, international trends, the 'tiger' economy, market demand, the availability of funding, the presence of Sligo Institute of Technology and networking among producers. The food sector was mentioned as being particularly innovative because the producers were aware of market trends and their products were market driven. In the Southwest, innovation was linked to increased competition, the skills and expertise of management, market demand, a growing appreciation of local products and the existence of a culture of innovation. Again, the food sector was highlighted as being particularly innovative, partly due to the education and advisory services present in the region. National fish, food and organic production organisations referred to changing market demands, market knowledge, and EU supports and policy as contributing to innovation in both regions.

The principal factors perceived as inhibiting innovation in the Northwest were: the absence of a tradition of entrepreneurship, a high perception of risk, a lack of education, skills and knowledge of the market place, the absence of a large market, a shortage of finance, and outmigration among the better educated. In the Southwest, the buoyancy of the regional tourism industry was viewed as depressing innovation; quite simply, businesses saw no need to innovate. In relation to food, scepticism, the lack of status of small-scale production, and a fear of failure were factors identified. Other general influences included a lack of education, training and resources, both in terms of finance and time, and a lack of profitability to invest in innovation.

In both regions, lack of innovation in the crafts sector was attributed to the demands of manufacture and meeting current order levels, which allowed no time for developing new products. In the tourism sector generally, restrictive building regulations and a lack of funding for market research were mentioned. Distribution costs, a lack of technical support, education, knowledge, market research and capital, and 'fear' were identified by national fish, food and organic food production organisations.

C. Frameworks Necessary for Successful Marketing Strategies

Marketing assumes particular importance in the context of Irish goods and services because of the export orientation of the economy and the desirability of promoting the consciousness of Ireland in overseas markets. Most organisations responded positively to the concept of the EC implementing special measures to assist local producer groups with their marketing. Most felt that producer networking should be an important part of the marketing strategy of small and medium sized enterprises (SMEs), but that its establishment required support. Other perceived benefits were that producer networks would allow for the development of a quality regional brand image, would improve traceability, could provide additional funding for SMEs, and would allow for dissemination of information.

The crafts organisations, including the Crafts Council of Ireland, viewed PMGs as potentially useful in getting group rates for transportation. However, organisational difficulties were foreseen because of the individuality of crafts products and crafts producers. Bord Iascaigh Mhara felt that, whilst PMGs could potentially help alleviate distribution problems, the existing groups were more concerned with technical problems. The West Business Innovation Centre and Cáis (which represents farm cheese producers) expressed doubts that such groups could work in that sector, because of the diversity of the products. By contrast, Real Foods of Ireland and The National Food Centre viewed marketing groups as a way of improving the marketing chain, given proper financing. All of the organic food production organisations favoured such groups as a means of increasing volume, decreasing costs, regulating quality and sharing production and storage facilities. PMGs were seen as vitally important by most tourism organisations. LEADER companies, County Enterprise Boards and other organisations that dealt with a range of QPS viewed such groups as an important way of improving the marketing chain.

Some barriers to the development of PMGs were identified by producers and organisations. These included a lack of finance, experience and personnel willing to dedicate their time to the establishment and maintenance of these groups. For food producers, marketing strategies must take account of structural changes in food retailing and distribution. There are two broad options: to supply localised and limited markets or to access the large-scale multiple outlets.

Group organisation was also seen by food producers as a means of lobbying for policy purposes. However, there was some hesitancy on the part of the statutory agencies to become involved in the mechanics of group organisation; they considered that this was a function that properly should rest with the producers.

Recommendations: Quality, Promotion and Marketing, Regional Imagery

'Quality' was highly prized as a feature of products and services by the producers, consumers and organisations interviewed. Differences between the three groups were apparent in the importance attributed to different quality indicators. Issues were identified where organisations potentially have a role to play:

- funding and advice to help producers with installing quality systems (e.g. Hazard Analysis Critical Control Point- HACCP) in the speciality food sector;
- the establishment and effective monitoring of strict quality criteria in association with regional branding;
- recognition of subjective dimensions of quality in food and an

acknowledgement of a role for producer groups in monitoring such dimensions;
- stricter control of activities that are potentially damaging to the quality of the natural and built environments;
- stricter regulation of tour operators in the tourism sector;
- stricter control of the number of group tours being introduced to popular touring locations.

In the context of the **promotion and marketing of QPS**, several key issues emerged as requiring attention:
- additional training for producers in promotion and marketing relating to QPS;
- additional funding to permit producers employ professional marketing staff, possibly for group marketing;
- assistance for some small-scale crafts producers to become more commercially oriented in their production systems, whilst retaining the niche characteristics of their products;
- further recognition by organisations of the special features of handcraft production in the promotional and marketing assistance provided;
- further support for small-scale food producers to assist them in developing more effective physical distribution systems, particularly in the context of accessing the multiples and export markets;
- support to develop use of the Internet for promotion;
- dedicated on-going financial and facilitatory support for the establishment of group marketing;
- improvements in road, rail and air infrastructure in the Northwest;
- increased hotel accommodation in counties Leitrim and Roscommon in the Northwest;
- improved standards of presentation of products.

Regional imagery was used to some extent in the promotion and marketing of many of the surveyed QPS. Organisations have a role to play in further developing regional imagery as a strategy for promotion and marketing in a number of ways, including:
- linking regional imagery to the established national imagery through use of similar themes and through joint promotional campaigns, whilst at the same time preserving the distinctive features of the former;
- ensuring the validity of the image by establishing relationships with

quality characteristics and by safeguarding broader aspects of environmental quality;
- seeking to ensure that duplication of imagery and competition is minimised at regional and sub-regional levels.

The use of regional imagery in promotion and marketing has potential to be further exploited in Ireland. However, this exploitation will not be without difficulties and may be more appropriate for particular products and markets than for others.

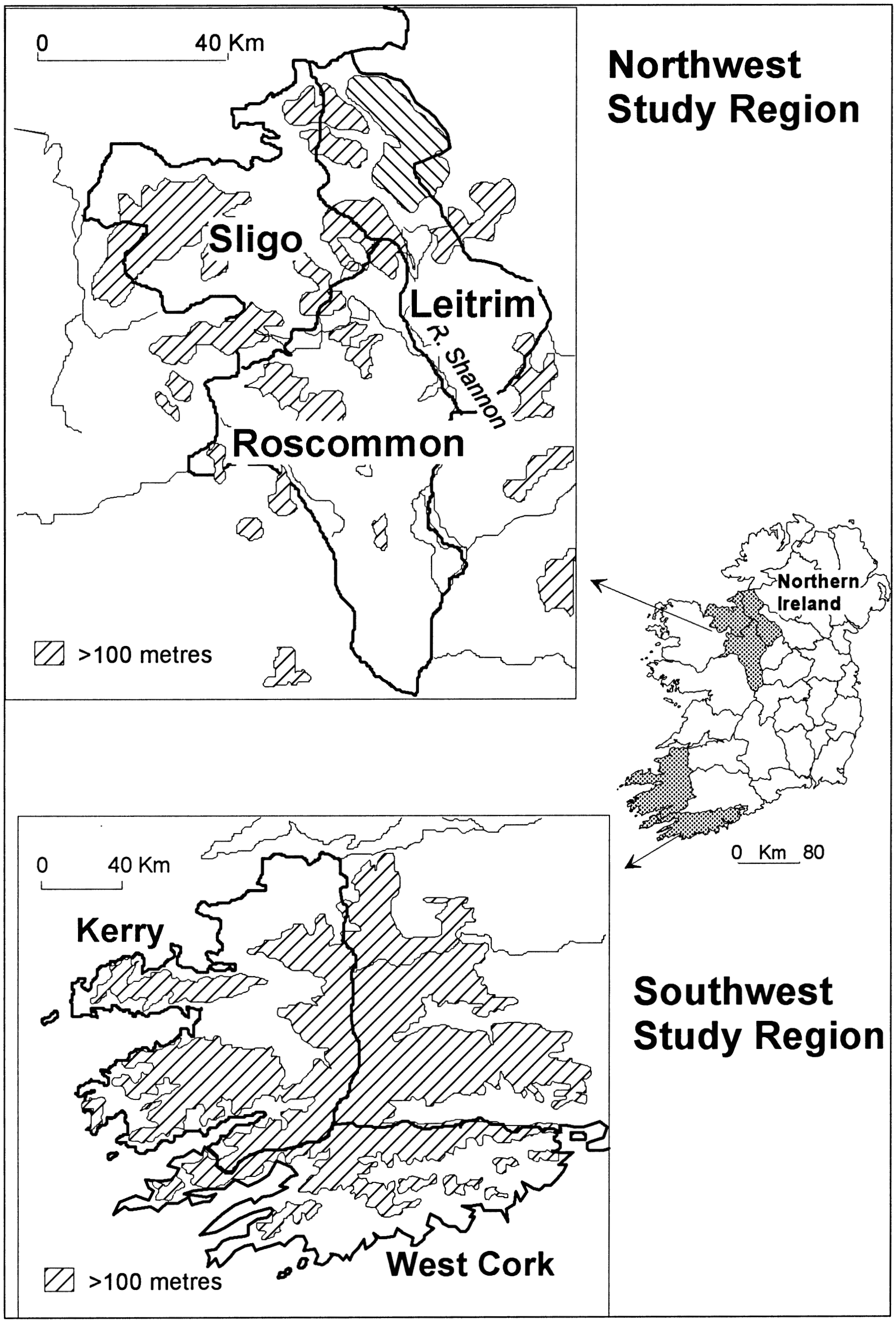


Figure 1.1 Study regions

Chapter 1: Regional Imagery and the Promotion of Quality Products and Services

1.1 Introduction

This chapter introduces the RIPPLE project, its underlying objectives and the tasks developed to address those objectives. The research is discussed with respect to rural development policy in Ireland and issues relating to regional imagery and quality. Brief reference is made also, for information purposes, to theoretical concepts relating to marketing and geography which informed the research but which are not elaborated on here.

The general objective of the RIPPLE project was to help public and private institutions develop strategies, policies and structures to aid the successful marketing and promotion of quality products and services (QPS) in the lagging regions of the EU. Innovatively, it linked together work on regional imagery and marketing in relation to the relative success and failure of QPS, of both an agricultural and non-agricultural nature.

In Ireland, the research focused in particular on the northwestern counties of Leitrim, Roscommon and Sligo, and the southwestern counties of Kerry and West Cork (Figure 1.1). Both regions were characterised in the mid-1990s by features of social and economic disadvantage, including below average levels of population growth and third level education, outmigration and a contraction of basic health, education and public transport services. Both regions and particularly the Southwest had, nevertheless, benefited since the late 1980s from the allocation of increased EU Structural Funding to Ireland (Fitzpatrick Associates 1997).

The QPS best represented in the Northwest region were handcrafts, rural tourism (accommodation and recreational activities), speciality foods, processed fish, and organic produce; those in the Southwest were handcrafts, rural tourism (accommodation and recreational activities), speciality foods and processed fish. The project surveyed the producers and consumers of QPS as well as key organisations involved with their development, promotion and marketing. In this way it was hoped to identify the factors that contributed to success and that provided examples of good practice that might be promoted more generally in lagging regions. A panel of experts representing the various sectors was consulted throughout the research.

Three particular issues were explored to achieve the objectives of the project:

A. Constructions of quality, links to place and the use of regional imagery in promotion and marketing;
B. Regional factors which contribute to successful innovation;
C. Frameworks necessary for successful promotion and marketing.

Three interrelated tasks were carried out which examined these issues with regard to the producers of QPS, the organisations involved and the consumers:

I. The first task related to the initial and intermediate producers of QPS and included a review of the marketing structures in the study regions and a survey of 166 selected small and medium sized enterprises (SMEs) that produce QPS in the two study regions. The aims of this task were: to identify the features of QPS businesses; to measure the local and regional cost-effectiveness of current marketing strategies and promotional activities among small and medium sized rural enterprises small and medium sized enterprises both farm and non-farm; and to assess the perceptions of the owners/managers of the SMEs on existing activities for the promotion of a regional image in relation to particular QPS. All of the SMEs employed fewer than 50 persons full-time and a majority employed less than ten persons.
II. The second task related to institutional actors and involved a survey of representatives of 41 organisations (42 interviews) that were closely involved with the selected products and services. The aims of this task were to examine the marketing environment, strategies and activities, and institutional structures developed by both local authorities and development and marketing agencies to improve the promotion and marketing of QPS; and to identify both good practice of the quality policies used and barriers and threats to the image of QPS in the lagging regions.
III. The third task related to the marketplace and comprised a survey of 397 consumers in both study regions and in the cities of Galway, Cork and Dublin. The aims of this task were to explore consumers' perceptions, wants and needs in relation to the purchase of QPS from specific lagging regions; to examine consumers' perceptions of the links between location, quality image and actual product and service characteristics;

and to identify the social, psychological and economic factors influencing consumer behaviour as regards the products and services of lagging regions.

1.2 Research Context

Rural development assumed new prominence as a clearly articulated policy objective during the 1990s in national development programmes and in EU-funded national development plans, as area-based, integrated and multi-sectoral approaches were introduced (NESC 1994; O'Malley 1993). The 1990s saw major rates of growth in the Irish economy, but disparities persisted within the farm sector (Government of Ireland 1997). Recommended remedial solutions included institutional reform which would create greater co-ordination and involvement. Capitalising on links to place and aspects of heritage and culture were advocated also (OECD 1995).

The research investigated the role of quality as an attribute that may be used to effect in gaining market share. There is widespread recognition of the role of quality in marketing in official policy documents relating to the main sectors investigated (Government of Ireland 1993a; 1996). Objective dimensions of quality are promoted by a range of state agencies, by organic farming and food organisations, and by tourism PMGs. Many niche producers also pursue subjective quality characteristics (Cowan and Sexton 1997; Crafts Council of Ireland undated). Quality is associated with regional branding by West Cork LEADER and Leitrim County Enterprise Board in specific sectoral initiatives. However, at the time of the research, no Irish products had been awarded official EU quality marks, including those administered under EU Regulations Nos. 2081/92 and 2082/92 concerning the protection of geographical indications (PGIs), designations of origin (PDOs) and certificates of specific character for agricultural products and foodstuffs. At the time of writing, three products have been registered: Clare Island Salmon (PGI); Imokilly Regato Cheese (PDO); and Timoleague Brown Pudding (PGI).

The deliberate use of images of places, people and evocations of heritage to market Ireland as a tourist destination and place of food production is well established (O'Connor 1993; Drummery 1992). The imagery used includes aspects of Celticity and rurality, picturesque natural unpolluted environments and friendly people. One of the aims of the research was to document the use of local linkages and to suggest how they might be developed further. An 'image' in marketing terms refers to the set of beliefs, ideas and impressions held about an object, and comprises both rational and emotional elements. A 'quality image' can be created through the use of signs and cues which consumers employ to judge quality. It can benefit a product by defining its character, thereby achieving commercially significant differentiation in the eyes of consumers. Marketing theory also provides concepts for examining the analytical, strategic and managerial stages of the marketing process.

In marketing, 'quality' refers to the totality of features of a product/service that influence its ability to satisfy needs (Kotler 1997). A QPS is 'differentiated' in a positive manner from the standard product, it is recognised as such by the consumer, and it can therefore command a market benefit if it is effectively marketed. From a marketing perspective, quality-specific differentiation can be achieved through the use of the following techniques (Ilbery and Kneafsey 1998):

- **certification** in the sense of self regulation, possession of a quality mark/symbol/product/service designation;
- **association** by means of regional designation, traceability, local environment, cultural and historical roots;
- **specification** pertaining to production/service method, raw materials, ownership;
- **attraction** referring to design, texture, flavour, taste, freshness, appearance, premium price, personal attention.

Quality is a subjective notion, one which is perceived differently according to the motives and values held. In terms of consumer perceptions of quality, for instance, these will be influenced by a whole range of factors such as age, occupation, education, gender, household residence and lifestyle. These factors in turn help to shape consumers' responses to the use of regional images as an indicator of quality. Furthermore, as shown by studies within geographies of consumption, purchase decisions will also be affected by circumstances surrounding the act – such as whether the consumer is on holiday, or whether products are being bought directly from producers and thus, potentially, invested with greater degrees of 'authenticity' (Ilbery and Kneafsey 1998).

1.3 Marketing Context

The environment in which marketing takes place was a central component of the research. Various institutional, physical, social, technological, economic and environmental factors are conducive to the development of quality features in products and services in Ireland. Adjustment to global restructuring, increasing liberalisation of agricultural trade and increased competition have resulted in new emphasis being placed in official policy on 'quality' as conferring competitive advantage in the commercial food industry (Government of Ireland 1992; 1993b). The social and cultural environment of many areas of the two study regions has been severely depleted by outmigration. The reduced pool of potential local entrepreneurs and of investment capital has served to impede innovation and indigenous development. At the same time, sentiments of anti-modernism and anti-urbanism are contributing to a quest for contact with traditional cultures among some crafts and organic producers (in the Northwest) and demand is growing for niche local products. Cultural tourism is of increasing importance in the linguistically and culturally distinctive Gaeltacht areas of the Southwest (Convery *et al*. 1996).

Improved communications technologies, including e-mail and the Internet, are generally perceived as providing opportunities for remote locations to lessen the obstacle of distance from major markets. Transport costs nevertheless remain problematic for many quality producers in lagging areas. The economic environment in Ireland is broadly conducive currently to the development of quality products and services in terms of the funding assistance, information and advice that are available from the EU and from the national government. In the 1990s, the rate of annual growth of the Irish economy exceeded the EU average which served to increase demand for quality products and services.

1.4 Concepts Underpinning the Research

The research project was developed within the context of a range of concepts derived from marketing and geography (Ilbery and Kneafsey 1998). Three areas of theory in particular were used in analysing the relationships between the production, promotion and marketing, and consumption of QPS: namely, actor network theory, regulation theory and the geography of consumption. This publication focuses on describing the research outcomes rather than on theoretical issues per se. However, because occasional references are made to conceptual issues in the discussion, broad definitions are provided here for information.

In actor network theory, the actors (who may be producers, organisations or consumers) are viewed as being engaged in a constant process of alliance-building. Thus, from a producer perspective, advertising can be thought of as a means of establishing alliances between producers and customers or consumers. In the case of SMEs, it is likely that producers will concentrate their energies on forming alliances with powerful intermediaries such as retailers, who then in turn adopt advertising and marketing strategies to build lasting alliances with consumers. These strategies may include the use of regional images to convey messages about products which will in turn encourage consumers to buy them.

Regulation theory is constructed around two key concepts: the regime of accumulation i.e. the organisation of production, income distribution, exchange of products and consumption; and the mode of regulation i.e. the institutional forms, procedures and habits which persuade or coerce conformity with the demands of the regime and enable it to reproduce itself (e.g. regulations relating to the approval of accommodation premises or to the handling of food). The macro processes of regulation and accumulation are mediated at the local level through the local mode of social regulation. This consists not only of institutional, political and economic structures, but also cultural aspects, traditions and place history. In other words, policies relating to QPS will be influenced by local specificities which feed back into national and international regulation.

Finally, concepts relating to the geographies of consumption enable a better understanding of how consumption practices are socially, politically and economically constructed (Jackson and Thrift 1995). Ideas about consumer behaviour are of particular relevance to the RIPPLE project. For instance, in the case of food, it is recognised that markets are socially as well as politically and economically constructed (Marsden 1996). Consumers are becoming more interested in, and knowledgeable about, the origins of food, the 'freshness' of food (Le Heron and Roche 1995), and the health and safety aspects of particular foods. Furthermore, consumption is increasingly being viewed as being bound up with the construction of personal identities in terms of status, distinction and belonging (McRobbie 1989; Gronow 1993; Jackson and Holbrook 1995). Rodriguez-Zuniga and Green (1992) wrote about the emergence of the 'new consumer' who personalises his/her demand, giving more value to aspects such as quality and 'individualised added services' to the detriment of features like price and quantity. More specifically, Bell and Valentine (1997) argued for the centrality of food in the construction of 'lifestyles' and suggest that particular ingredients are invested with cultural capital. Trends such as these indicate a growing potential market for regional QPS.

This conceptual framework was used as the basis for the construction of surveys of producers, consumers and institutions involved in QPS in lagging EU regions. The research team was thus able to ensure that the surveys were not only tailored to meet the specific objectives of the RIPPLE project, but were also composed of theoretically-informed questions. This in turn helped to ensure that the project would contribute towards a better understanding of key under-researched themes such as the links between international and regional modes of regulation and accumulation, the links between geographies of production and consumption, the significance of the rural as a site of consumption, and the ways in which meanings are constructed around particular products and places. These issues are discussed further by Ilbery and Kneafsey (1998).

1.5 Chapters that Follow

Chapter 2 introduces the two study regions in terms of their social and economic characteristics and the supports available for business development. Chapter 3 focuses on the central components of the production and marketing of the selected QPS. Chapter 4 outlines the institutional context within which the selected quality products and services were produced and consumed and Chapter 5 discusses consumer perspectives on these elements. Chapter 6 concludes with an evaluation of the results of the three study objectives and makes recommendations in relation to the promotion of quality, the promotion and marketing of QPS, and the associated use of regional imagery.

Chapter 2: Economic Review of the Study Regions

2.1 Introduction

This chapter introduces the two study regions, briefly discussing the physical geography and the demographic, social and economic characteristics. Detailed statistical information is included in Appendix A, Tables A1-A7. Information relating to the regional economies and business supports available is presented in this chapter also.

In common with the state as a whole, which was defined as a single region for statistical purposes by the European Commission (EC) from 1973 until 1999, both study regions had Objective 1 status in 1997 (only the Northwest continues to have this status since 1999). Both regions are characterised by features of social and economic disadvantage and were classified as being Severely Handicapped according to the pre-1992 provisions of EU Directive 268/75. In 1992, re-designation as More Severely Handicapped took place. Studies in the late 1990s, based on a range of social and economic indicators, illustrated that extensive expanses of both regions continued to lag severely behind national norms (Coulter 1996; Jackson and Haase 1996; National Economic and Social Forum 1997). Whilst the regions shared features of social and economic disadvantage, inter-regional and intra-regional contrasts were present in terms of topography, demography and economy. Niche rural-based product development was a feature of both regions.

The Northwest, a composite region, which does not coincide with existing regional structures, was defined for study purposes so as to include counties with more severe aspects of underdevelopment and provide contrast with the Southwest (Figure 1.1). With the exception of County Sligo, which has an extensive coastline, much of the region is inland and agricultural, with a dominance of small farms and low intensity agriculture. The region is bordered to the north by the Erne drainage system and to the east and southeast by the River Shannon, both of which are used extensively for cruising. The uplands rarely exceed 600 metres in altitude. North Sligo and adjacent parts of Leitrim are known as the 'Yeats country' (immortalised in the poetry of Noble Laureate William Butler Yeats). There is limited provision of hotels in the region and guesthouse and farmhouse accommodation predominates. Game angling is a niche product in north Leitrim, as is coarse angling on several lakes in all three counties. Aquaculture and niche foods were being developed at the time of the study. County Leitrim had become a locus for organic food production during the previous decade. A reputation for handcrafts was being developed.

The Southwest coincides in large part with the tourism and planning regions of that name. The southern parts of Kerry and Cork fall within the western small farm fringe but both counties have fertile milk and grain producing areas in the north and east. The region has a highly indented coastline with wide sheltered bays suitable for fin- and shell-fish aquaculture. Sea fishing is also an important economic activity. The Lakes of Killarney and the mountainous southwestern peninsulas are long-established touring areas and the region has well-developed accommodation and recreational infrastructure (hotels, guesthouses, golf courses, angling opportunities). West Cork enjoys national and international recognition for its farmhouse cheeses and niche foods. Handcrafts are speciality products in West Cork and southwest Kerry.

2.2 Demography and Socio-Economic Conditions

The data presented for the Southwest region include all of county Cork. The respective populations of the Northwest and Southwest regions in 1996 were 132,853 and 546,640 (Table A.1). The presence of Cork County Borough and of several large towns in County Cork contributed to a higher overall population density in the Southwest (45 per km. sq.), but densities approximated those of the Northwest (23 per sq. km.) in the more rural locations. Net population losses took place in all counties except Cork during the recessionary years of the 1980s but recovery followed during the first half of the 1990s.

Both regions recorded higher than the national average dependency ratios in the mid-1990s, with Leitrim and Roscommon having the highest ratios overall (Table A.2). Outmigration continued during the early 1990s from the school-leaving and young working age cohort (15 to 24 years) in both regions, and particularly from Leitrim and Roscommon where higher educational opportunities were absent. There was evidence of modest yet increasing immigration to both regions, notably to counties Leitrim, Sligo and Kerry, with Germany being the main source of migrants from Continental Europe (Central Statistics Office 1978a; 1986a; 1996a; 1997c).

Educational levels have improved substantially in the state since the late 1960s and the general trend over recent decades has been for more people to stay longer in full-time education (Table A.3). Nevertheless, lower years of formal education were characteristic of males in the Northwest. In 1996, third level education attainment was highest in the Southwest and in county Sligo, reflecting the presence of a range of higher educational institutions in Cork County Borough, and Institutes of Technology in Tralee and in Sligo town.

Unemployment has traditionally been a problem of some magnitude in both regions (Border Regional Authority 1996; South West Regional Authority 1996; West Regional Authority 1996). The unemployment rate (persons unemployed as a proportion of the workforce) increased in the 1980s but declined during the first half of the 1990s (Table A.4). Unemployment rates were higher among males than among females and female participation in the workforce increased in recent decades. Trends over time included a decline in agricultural employment, most notably during the 1970s, when restructuring took place following accession to membership of the then EEC, and an increase in service sector employment in both regions (Table A.5). Agricultural employment remained considerably more important for males in the Northwest than in the Southwest and in counties Roscommon and Leitrim in particular. Manufacturing employment was of greater importance in the Southwest than in the Northwest.

A contraction in basic health, education and a range of other services has taken place in the rural parts of each region in recent decades, following national and international trends. Nevertheless, recognition is given by the state to the dispersed nature of population in, for example, general practitioner provision above the national average. Access to public transport is relatively low in both study regions but levels of car ownership increased substantially during the 1990s, reflecting improved economic conditions (Central Statistics Office 1992; 1999).

The western peninsulas of county Kerry and parts of southwest Cork are classified as Gaeltacht. The relevant Department of State (Arts, Heritage, Gaeltacht and the Islands in 1997-1999) and Údarás na Gaeltachta, have statutory responsibilities relating to the Gaeltacht, most notably to support the use and ensure the survival of the Irish language. Support is provided for industrial, service and natural resource based employment and for cultural activities. All counties have specific identities derived from landscape, culture, legend, and literary and musical associations, which were being used increasingly in marketing tourism services and producer goods. Both regions have a wealth of natural and cultural heritage features which are protected to some extent under Irish and EU law.

2.3 The Regional Economy

The performance of the regional economies since the early 1970s was influenced by general economic conditions at national and international levels. In addition to the negative impacts of high inflation during the 1970s and the first half of the 1980s on output and employment, expenditure on regional development in general declined. In the 1990s inflation fell to low levels and, during the first half of the decade, the annual rate of growth in the Irish economy exceeded the EU average. From the late 1980s on, additional investment in infrastructure, agriculture and economic activity more generally was associated with the allocation of increased EU Structural Funding to Ireland. Both regions benefited, and particularly the Southwest where per capital incomes had reached national norms by the late 1990s (Fitzpatrick Associates 1997).

Farm products dominate among the raw materials available in both regions. Milk provides the basis for a large-scale primary and secondary processing industry in the Southwest and to a lesser extent in the Northwest (Table A.6). Pig and poultry production and processing take place in both regions and beef and sheep meats are produced for home consumption and for export. Speciality food production, including farmhouse cheeses, is of considerable importance in the Southwest. There was some evidence of on-farm diversification in both regions in the mid-1990s, among which accommodation was of particular importance (Central Statistics Office, 1994b). Organic production had become a niche activity in counties Leitrim, Roscommon and south-west Cork since the early 1990s (Willer and Gillmor 1992). Some 40% of the national fish catch by revenue is landed in the Southwest. Farming of salmon, sea trout, oysters and mussels has increased in volume in the south-western bays in recent years and mussel farming takes place in Sligo Bay (O'Connor and Whelan 1991).

The largest number of industrial establishments in both regions in 1996 was in metals and engineering, and food (Table A.7). The total number of establishments fell in both regions between 1981 and 1990, but increased thereafter. Relatively small size establishments dominated overall in 1996, particularly in the more rural localities. Such localities benefited from investment in tourism, food and crafts activities assisted by LEADER I, LEADER II and other partnership funding (Kearney and Associates 1997). The value of gross output in 1996 was considerably higher in the Southwest illustrating the greater size of the regional economy, even when Cork City, which lies outside the study region but within the area to which the statistics apply, is accounted for.

Support infrastructure

There was a growing network of organisations in both regions which supported the selected products and services. Tourism-related training programmes were provided by CERT (National Training Authority for the Hotel, Catering and Tourism Industry) and FÁS (the national training and employment authority), and tourism marketing programmes by Bord Fáilte (the Irish Tourist Board) and the Regional Tourism Authorities. Fish and food processing, their promotion and marketing were supported by a range of national and regional agencies including Bord Bia (the Food Board), Bord Glas (the Horticulture Development Board), Bord Iascaigh Mhara (the Sea Fisheries Board), Teagasc (the Agriculture and Food Development Authority), Shannon Development, the Organic Unit of the Department of Agriculture and Food, the Irish Organic Farmers and Growers Association, and the Organic Trust. The Teagasc National Food Centre in Dublin provided research, advice and training for the food sector. The Crafts Council of Ireland and Enterprise Ireland supported crafts producers. Enterprise Ireland was formed in 1998 from An Bord Tráchtála (the Irish Trade Board) and Forbairt (the development agency for indigenous industry). A range of regional and county agencies provided assistance for most sectors: Enterprise Ireland, Shannon Development, Údarás na Gaeltachta, County Enterprise Boards, LEADER companies, and Area Development Management (ADM) Partnership Companies. Several tourism producer marketing groups (PMGs) existed. Third level educational institutions in both regions served informational and research functions, as did the Marine Science Institute at the National University of Ireland, Galway, for aquaculture and fisheries.

Regional infrastructure

The main markets in the Northwest are Sligo (pop. 18,509 in 1996), and the smaller county towns of Roscommon (pop. 1,432 in 1996) and Carrick-on-Shannon in County Leitrim (pop. 1,868 in 1996). Cork City (pop. 179,954 in 1996) which is located east of the Southwest study region is the second largest city in the state and a major market centre. The Southwest contains a number of other large towns, notably Tralee, County Kerry (pop. 19,950 in 1996). At the time of the study, food markets which provided outlets for speciality food producers were held weekly in Cork City and in several of the larger towns and many of these towns had delicatessens where niche products were sold. Export markets were well developed for dairy products, through the major co-operatives, and for meat and fish products. Handcrafts were often sold from producer retail outlets associated with workshops in tourist locations.

The main towns are linked into the national primary road and rail network. However, extensive areas of the southwestern peninsulas and of the Northwest are still traversed by national secondary and third class roads only. There are regional airports in Kerry and Sligo, and links to Britain and Continental Europe from Knock, County Mayo, and Cork. Digital telephone services were available throughout the study regions and coverage for mobile telephone use was widely available in 1997.

2.4 Business Development and Marketing Schemes and Initiatives

Business development and marketing schemes since the late 1980s fall under three main initiatives: National Programmes under Community Support Frameworks administered by the state agencies; EU Initiatives; and National (autonomous) Measures (Matthews 1994).

National programmes under Community Support Frameworks

The first *National Development Plan, 1989-1993* (*NDP*) (Government of Ireland 1989) addressed the economy's structural weaknesses and the creation of conditions conducive to productive investment. Specific priority measures related to agriculture and rural development, tourism, food and fisheries. The second *NDP, 1994-1999,* sought to ensure the best long-term return for the economy by increasing output, economic potential and long-term job creation, and by offsetting long-term unemployment (Government of Ireland 1993a). Measures to achieve these objectives were described in various

Operational Programmes (OPs).

The *OP for Agriculture, Rural Development and Forestry 1994-1999* (Government of Ireland 1995a) incorporated Structural Fund measures and CAP reform accompanying measures. The Structural Fund measures included a sub-programme on structural improvement and rural development, which provided grant aid towards the cost of formation, the operating expenses of producer groups/associations, and farm diversification. Sub-programmes of the *OP for Tourism 1994-1999* (Government of Ireland 1994a) related to assisting the development of tourism-related natural and cultural facilities, product development, marketing, training and technical assistance. A marketing sub-programme (the European Regional Development Fund- ERDF- Marketing Support Scheme) funded projects with priorities relating to developing product and niche markets and attracting more high-yield business. The *OP for Fisheries 1994-1999* (Government of Ireland 1995b) contained several programmes for the development of infrastructure and technology, research, marine and land-based aquaculture, fish processing, human resources and marketing. The fish processing programme included measures to encourage joint ventures and marketing co-operation. The programme on the promotion of fisheries gave priority to measures which highlighted quality, including certification, and which targeted new export markets. The EU PESCA initiative was designed to assist structural change, diversification into tourism, and overseas promotion. The *OP for Industrial Development* (Government of Ireland 1994b) contained a sub-programme on the food industry aimed at exploiting the growth potential of food firms. It included development funding, training, promotion, marketing advice and support. Bord Bia had responsibility for the marketing element of this programme. The Food Division of the Department of Agriculture and Food administered schemes to implement the EU Regulations Nos. 2081/92 and 2082/92 concerning the PGIs, PDOs and certificates of specific character for agricultural products and foodstuffs. A Marketing Improvement Assistance Programme was specially designed to promote food and drink exports. The *OP for Local Urban and Rural Development* (Government of Ireland 1995c) contained measures on local enterprise, the integrated development of designated disadvantaged and other areas, and urban and village renewal.

EU initiatives

Seventeen LEADER groups were established in Ireland under LEADER I

(Kearney *et al*. 1994). LEADER II (1994-1999) covered the entire country and included a rural innovation programme for collective bodies aimed at promoting co-operative marketing of tourism/crafts/speciality foods and other sectoral products and establishing standards and other requirements for membership of such groups. Several EU Employment Initiatives were designed to develop human resources, promote social solidarity and equal opportunities in the labour market: New Opportunities for Women (NOW); HORIZON, which focused on the disabled; and Youthstart (Commission of the European Communities 1997). INTERREG was designed to offset specific problems associated with a border location and to promote networks of cross-border co-operation (Reynolds 1993).

Other national measures

Several national government measures, in place between 1997 and 1999, targeted rural development. County Enterprise Funds applied to six border counties and received funding from the International Fund for Ireland. A Global support Grant was agreed between the EU Commission and the Irish Government in 1992 to support area-based partnerships, initiated as part of the government's Programme for Economic and Social Progress (PESP) to combat long-term unemployment (Craig and McKeown 1994). The Programme was administered by an intermediary body, Area Development Management Ltd. (ADM).

Other agencies which provided business supports included the Bank of Ireland and Allied Irish Bank enterprise support units, Business Innovation Centres, Co-operation North, First Step and FÁS. Producer and marketing groups played representative and information roles, e.g. Irish Country Holidays, the Irish Quality Association, the Crafts Council of Ireland, the Irish Organic Farmers and Growers Association, the Irish Federation of Organic Associations and the Organic Centre at Rossinver, County Leitrim.

2.5 Summary

For the duration of the second *NDP 1994-1999* (Government of Ireland 1993a), the Northwest and Southwest study regions were designated as EU Objective 1 regions, although the Southwest was less underdeveloped than the Northwest. Arising in part from this status, a wide range of general developmental support measures became available to entrepreneurs in both regions from EU and national sources. These supports formed the context in which QPS were developed, promoted and marketed. The characteristics of the individual entrepreneurs and the sampled businesses are discussed in Chapter 3.

Chapter 3: Production, Promotion and Marketing of Quality Products and Services

3.1 Introduction

A total of 166 producers of QPS who were selected purposefully on the basis of the quality criteria agreed by the RIPPLE study team were interviewed during 1997 and 1998. This chapter presents the results of the analysis of these interviews. Its role is to identify the key features of entrepreneurship and business practice that are conducive to the successful development and support of QPS and to their effective promotion and marketing. Key social characteristics of the producers and their business experience are discussed. The history of business development is traced and current features of employment, output and management practices are documented. Producers' views on quality and the measures taken to develop and promote quality are reported, as are the strategies used to promote and market QPS more generally. The relationships between the producers and a range of state and private development, promotional, marketing and representational agencies and organisations are assessed. Producers' views of the imagery associated with their region of residence are discussed, as is the use made of regional imagery in promotion and marketing.

3.2 Sampled Entrepreneurs and Businesses

Entrepreneurs

The studied products and services were selected with reference to the series of quality criteria outlined in Section 1.2, i.e. one or more of: certification, association, specification and attraction. Due to a notable lack of any systematically compiled databases on the producers of QPS in the surveyed regions, extensive background work was undertaken to construct lists of pertinent businesses. From the constructed lists, initial and intermediate producer enterprises were purposively selected (a choice-based sampling procedure). All enterprises were SMEs according to a common definition adopted for the purposes of the project and employed 50 full-time employees or less (less in the majority of cases). The owner of the enterprise was interviewed in a majority of instances and a recommended employee in the remainder.

Some 73 producers were interviewed in the Northwest and 93 in the Southwest. Handcrafts, rural tourism (accommodation and recreational activities), speciality foods, processed fish, and organic production were represented in the Northwest and handcrafts, rural tourism (accommodation and recreational activities), speciality foods and processed fish products in the Southwest (Table 3.1). Such a diversity of products and services was necessary in order to provide samples of QPS of reasonable size. Accommodation, cheese production, fish processing and organic production were among the few activities where localised clustering was present.

Classification of ownership by gender revealed a slight preponderance of male producers in both regions, with the proportion being considerably higher in the Southwest than in the Northwest when membership-owned golf clubs were included (Table 3.2). In the case of foods, female producers operated about half of the enterprises in both regions. They were either entrepreneurs in their own right, or had set up enterprises in co-operation with partners and then assumed major responsibility for running the business. This was more common in cheese-making where there was a gender-based division of tasks between the cheese business and the farm. Males predominated among fish processors and organic farm operators. Female owners outnumbered males in crafts in the Northwest. Considerably more (predominantly larger) tourism businesses were owned by males than by females in the Southwest. Middle-aged producers predominated overall but the age profile was, in general, higher in the Southwest than in the Northwest, where the food, organic and fish producers were younger on average.

Less than half of the producers in both regions came from the study area but there were proportionately more immigrant owners in the Southwest (Table 3.3). Fewer food processors and crafts producers came from the study areas. Seemingly, in areas of historically high outmigration the level of entrepreneurship in the native and residual population is not such as to exploit fully the natural resources of these areas – especially by adding value. Many of the crafts producers used imported rather than local raw materials. Some of their skills were also not traditional to these areas.

Over 50% of the producers in both regions had third level education, a

Table 3.1 Selected products and services

Northwest	Southwest
Crafts (n=20)	**Crafts (n=22)**
Handmade crafts products (primarily textiles, pottery, leather-goods and jewellery)	Handmade crafts products (primarily textiles, pottery, leather-goods and jewellery)
Fine art products	Fine art products
Rural tourism (n=28)	**Rural tourism (n=29)**
Quality accommodation	Quality accommodation
Golf clubs	Golf clubs
Angling	Angling
Heritage attractions	Heritage attractions
Recreational activities	Recreational activities
Open farms	**Speciality food production (n=27)**
Cabin cruising	Speciality cheeses
Speciality food production (n=10)	Speciality meat/deli products
Speciality cheeses	Speciality confectionery/preserves
Speciality confectionery/preserves	Meats
Meats	Chocolates
Chocolates	Herbs
Herbs	Food ingredients
Food ingredients	**Fish processing (n=15)**
Organic produce (n=13)	Shellfish (Mussels, Crab, Clams, Lobster, Prawns)
Organic lamb/beef	Finfish (Salmon - smoked)
Organic vegetables and herbs	
Fish processing (n=2)	
Shellfish	

substantial proportion of whom were non-local. Educational levels were highest among crafts and organic food producers in the Northwest and among tourism and small food producers in the Southwest. Slightly more producers had training relating to marketing in the Northwest than in the Southwest, but a considerable proportion of training consisted of short courses, workshops and seminars rather than formal marketing qualifications. The proportions with training were highest in the organic and crafts sectors in the Northwest and among food producers in the Southwest. Previous experience of the business was most marked in the Northwest and particularly in the food sector. In the Southwest, however, almost three-quarters of fish processors had such experience, which may have compensated for a relative absence of training. Few organic growers had previous experience, but the sector was comparatively new and some operators were likely to come from non-farming backgrounds. More crafts producers in the Northwest than in the Southwest had previous experience in the business.

Table 3.2 Gender and age profile of producers

Enterprise type	No. of cases	% Male	% Female	% Predominantly male *	% Predominantly female *	Modal age group
Northwest	**73**	**50.7**	**42.5**	**4.1**	**1.4**	**36-45**
Tourism	28	50.0	35.7	10.7	3.6	55+
Crafts	20	45.0	55.0	0	0	36-45
Food	10	40.0	50.0	0	0	26-35
Organic produce	13	76.9	23.1	0	0	26-35
Fish	2	0	100.0	0	0	26-35 & 46-55
Southwest	**93**	**58.1**	**29.0**	**12.9**	**0**	**46-55**
Tourism	29	51.7	17.2	31.0	0	46-55
Crafts	22	50.0	36.4	13.6	0	46-55
Food	27	48.1	51.9	0	0	46-55
Fish	15	100.0	0	0	0	46-55

*In cases with more than one owner

Table 3.3 Immigration, education, training and previous business experience

Type of enterprise	No. of cases	% from the study area	% with third level education	% with training re. marketing	% with previous experience
Northwest	**73**	**48.0**	**52.0**	**32.9**	**60.4**
Tourism	28	60.8	42.9	28.6	67.9
Crafts	20	30.0	60.0	40.0	50.0
Food	10	40.0	50.0	30.0	90.0
Organic produce	13	53.9	61.6	38.5	46.2
Fish	2	50.0	50.0	0	50.0
Southwest	**93**	**35.5**	**51.7**	**27.5**	**45.1**
Tourism	29	48.3	58.6	27.6	51.7
Crafts	22	18.2	40.9	27.3	36.4
Food	27	25.9	59.2	37.0	59.3
Fish	15	53.4	40.0	13.3	73.3

Business characteristics

Four management functions were examined (Table 3.4). Of these, general management had the highest level of owner responsibility (in almost 70% of cases). A further 19% of businesses in the Northwest and 15% in the Southwest were managed by a combination of people (including the owner). Owners were responsible for day-to-day management, production and quality-control, and promotion and marketing in a larger proportion of businesses in the Northwest than in the Southwest. Hired staff were responsible to a greater extent for day-to-day management and for production process/quality control than for promotion and marketing in both regions. Their involvement overall was greatest in the Southwest. There was limited involvement of partners/spouses and other family members. As owners assumed most of the responsibilities in running the businesses, the time available for marketing and related functions, e.g. group organisations, was limited, particularly among food producers.

Table 3.4 Delegation of responsibilities in quality product/service enterprises (%)

Area of responsibility	Owner	Partner	Family member	Hired staff	Combination of people
Northwest					
general management of business	69.9	4.1	0	6.8	19.2
day to day management of business	61.6	9.6	0	12.3	16.4
management of production process/quality control	64.4	2.7	1.4	13.7	17.8
management of promotional and marketing activities	63.0	5.5	2.7	6.8	21.9
Southwest					
general management of business	67.7	3.2	1.1	12.9	15.1
day to day management of business	46.2	8.6	2.2	25.8	17.2
management of production process-quality control	48.4	4.3	0	28	19.4
management of promotional and marketing activities	53.8	4.3	1.1	19.4	21.5

A majority of the businesses were non-farm but farm-based businesses accounted for a larger proportion of the total in the Northwest (32%) than in the Southwest (13%) (Table 3.5); the presence of members of the predominantly farm-based *Úna Bhán* accommodation providers marketing group and organic food producers in the Northwest contributed to this disparity. Some 41% of food producers in the Southwest were farm-based by comparison with only 10% in the Northwest, where the enterprises tended to be located away from the home of the owner because of a greater involvement with food retailing. Family ownership dominated overall, a situation which was linked to business scale and high personal involvement of the individual producers. This was true to a greater extent in the Northwest than in the Southwest, where the selected enterprises included more private companies, co-operatives and membership groups. Family ownership was highest in the food sector in both regions but varied in the case of other products. More organic food and tourism enterprises were family owned in the Northwest but more fish and crafts businesses in the Southwest. The mean age of the businesses was 13 years in the Northwest and 16 years in the Southwest. The longest established businesses overall were in tourism and fish processing. Food and organic businesses in the Northwest were most recently established, but they were generally not as innovative in adding value as their counterparts in the Southwest.

According to the selection criteria used, employment could number up to 50 persons on a full-time basis. Some businesses had employment of this order and many employed substantial numbers on a part-time or seasonal basis; on average, however, the selected businesses provided limited full-time employment (Table 3.6). The mean number of full-time employees was 7 in the Southwest and 5 in the Northwest. Full-time employment was highest in the food sector in the Northwest and in fish enterprises in the Southwest: tourism came in second place in both regions. Part-time employment was limited overall but was highest in the food sector in the Northwest and in tourism in the Southwest. The larger tourism and fish enterprises employed substantial numbers on a seasonal basis.

Turnover varied markedly between a mode of less than €12,963 in the Northwest and a bi-modal pattern of €38,890-€64,816 and €388,895-€648,157 in the Southwest, reflecting the generally larger size of the businesses in the latter region. Food and fish businesses had the highest turnover in both regions, especially in the Northwest where there was a high element of retailing. Some tourism enterprises in the Southwest reported comparable levels of turnover but did not exceed the €1,000,000 and over reported by some food and fish enterprises. Tourism, crafts and some organic producers in the Northwest reported the lowest turnover, reflecting the recent establishment of some of these businesses and the seasonal nature of farm-based tourism. The median turnover illustrated that some tourism businesses in the Northwest region were considerably larger than the modal pattern whilst some food businesses in both regions were considerably smaller than the modal pattern.

Table 3.5 Farm based; family owned; and mean age of enterprise (%)

Type of enterprise	No. of cases	% farm based	% family owned	mean age of enterprises (yrs.)
Northwest	**73**	**31.5**	**76.7**	**13**
Tourism	28	39.3	78.6	18
Crafts	20	0	55.0	11
Food	10	10.0	100.0	7
Organic produce	13	84.6	92.3	8
Fish	2	0	50.0	18
Southwest	**93**	**12.9**	**69.9**	**16**
Tourism	29	3.4	55.2	19
Crafts	22	0	63.6	15
Food	27	40.7	88.9	12
Fish	15	0	73.3	16

Table 3.6 Mean number of full-time and part-time employed; median and modal turnover of businesses

Type of enterprise	No. of cases	Mean no. full-time employed	Mean no. part-time employed	Median turnover €	Modal turnover €
Northwest	**73**	**5**	**1**	**25,927-38,889**	**<12,963**
Tourism	28	5	2	64,817-97,224	<12,963
Crafts	20	2	1	<12,963	<12,963
Food	10	14	3	194,448-259,263	1,296,315-2,592,628
Organic produce	13	1	1	12,964-25,926	<12,963 & 12,964-25,926
Fish	2	4	1	648,158-1,296,314	648,158-1,296,314
Southwest	**93**	**7**	**2**	**129,632-194,447**	**38,890-64,816 & 388,895-648,157**
Tourism	29	10	3	194,448-259,263	64,817-97,224 & 259,264-388,894 & 388,895-648,157
Crafts	22	4	1	38,890-64,816	38,890-64,816
Food	27	4	1	97,225-129,631	388,895-648,157 & 648,158-1,296,314
Fish	15	14	2	1,296,315-2,592,628	1,296,315-2,592,628 & >2,592,628

3.3 Producers' Views on Quality

'Quality' is not reducible to a single concept but incorporates interrelated elements. The distinguishing features of their products and services, as perceived by the entrepreneurs, varied but the markers in all cases included the 'quality' of raw materials, the skill and personal involvement of the craftsperson in the production process, design and crafts production methods, quality control, and finish and presentation. Links to the environment and area of production were mentioned by tourism and food entrepreneurs in particular. For accommodation providers, local food inputs were important, as was the property. In the Southwest, over one-third of the respondents referred to location; other features included the longevity of the business and family ownership. The most important factor distinguishing food, fish and organic food products was their identification with the particular producers; reputation, integrity and reliability in the eyes of customers and consumers were seen as critically important. Also, reference was made to the quality of the products, raw materials used, production and processing methods (e.g. artisan or handmade processes, use of 'craft' principles, traditional culinary skills or recipes), texture, flavour, taste and freshness of the products, and health and safety aspects. These comments referred particularly to cheese-making, fish smoking and cooked meat production.

Almost all respondents felt that their product was recognised as a QPS. Official quality certification was reported as being higher in tourism than in crafts: by 93% and 66% of tourism providers in the Northwest and Southwest, respectively, by comparison with 50% of craft workers. For the food sector, only organic products could be officially certified. Other food and fish products had generally no quality certification, although producers perceived ISO9000 and HACCP as acceptable indicators of quality. Of those with official certification, substantial proportions of tourism providers and craft workers felt that it influenced sales, in being an assurance of quality for consumers. For organic producers, use of the officially certified symbol was the only means by which consumers could identify their products; hence certification was critical. Unofficial certification, through membership of certain quality marketing groups, citations in recognised guidebooks, word of mouth and reputation, was seen as more important than official certification for tourism and crafts products.

Personal supervision by the owner was the most common method of monitoring quality in-house in tourism and crafts; external monitors included consultants, consumers, citations in recognised guide books, official bodies such as Bord Fáilte, membership of marketing groups which enforce quality criteria, and a jury-based quality commendation system operated in conjunction with the annual *Showcase Ireland* trade fair for crafts. For food, fish and organic enterprises, external monitors included: the Department of Agriculture and Food, the Department of Health, independent laboratories, bulk buyers, regulatory bodies (organic production), food writers, customers and consumers. For speciality foods in particular a producer group exists (Real Foods of Ireland), membership of which is by nomination based on quality standards.

3.4 Marketing Strategies

Producers' promotion and marketing activities

The majority of the producers in both regions established their businesses without conducting formal market research and marketed directly to consumers initially. Tourism in the Northwest was an exception in so far as intermediaries, such as tour operators and travel agents (particularly in the angling market), were targeted from an early stage, often with assistance from Bord Fáilte through introductory workshops. The promotional tools in both regions included, most importantly, Bord Fáilte guide books and brochures, advertising, signposts and publicity. Most craft workers in both regions started production because they possessed a particular skill, then approached customers (galleries, crafts and gift shops, department stores) with samples, or sold directly to the consumer through their own outlet. Many food sector producers began producing initially for self-consumption and, in giving away surplus, realised that there was a market for their product. Given the influx of 'incomers', many 'imported' knowledge of potential markets. Public supports were not crucial at the start-up stage of most food producers, but became important at later phases of business development.

Direct marketing to consumers declined over time in tourism and crafts and costs increased. Tourism entrepreneurs with established reputations tended to market in a focused way, often targeting niche high-income markets in Ireland and overseas through membership of marketing groups and contact with tour operators and travel agents. A significant number also came to rely on repeat business, word of mouth, citations in recognised guidebooks and the publicity generated. Most craft workers sold to customers through trade fairs, particularly the *Showcase Ireland* fair, and promotional literature and advertising were used extensively. Personal contact with consumers continued to be important for crafts and was facilitated through producers' own retail outlets. A number carried out contract work for other labels. Intermediaries were more important for craft workers than for tourism operators, with most distributing their products through retail outlets and other intermediaries in the region, elsewhere in Ireland and overseas. Among food, fish and organic producers, the territorial range was the local, the national or the export trade. The smaller producers generally and organic producers in particular, but not exclusively, were confined to local markets. Small food businesses and virtually all organic producers accessed their markets in a variety of 'direct contact ways'. Typically they made their own deliveries; organic farmers generally sold into local shops but some had a market stall in the local town or sold directly from the farm. By contrast, most of the larger businesses, and especially fish processors, served the main national and export markets. The well-established cheese and meat producers, especially those with larger volumes, sold into the multiples. For those serving distant markets, access to customers was through distributors, bulk buyers and wholesalers. 'Group stands' were organised for food fairs and, where appropriate, group displays, 'tastings' or other in-store promotions were arranged. For most, advertising was not a major expenditure but was indirect (e.g. in labels or wrappings). Considerable importance was attached to influencing food journalists.

Almost two-thirds of tourism respondents in the Northwest and the majority in the Southwest used the Internet for promotion and marketing and a high proportion took bookings that way. Use of the Internet was less common among craft workers. Little marketing use was made of this medium by food producers, who placed greater reliance on established personal contacts.

Marketing problems

The marketing problems encountered by tourism entrepreneurs included their remote location, the cost and difficulty of getting to Ireland, lack of marketing knowledge and financial constraints. Problems referred to by crafts producers in both regions were transport, packaging and delivery costs and, in the Southwest, identifying and reaching the appropriate consumers and customers. Many in both sectors felt that resources were wasted (both in terms of time and money) in 'trying out' various promotion and marketing methods and target markets before the most suitable approach was established. Producers of speciality foods aiming at niche markets identified a number of problems in accessing customers and consumers. Firstly, given their responsibility for most aspects of the business and the emphasis placed on personalised relationships with buyers, the main constraint was time. The second problem was the restructuring of distribution supply channels and systems whereby the large multiples were reducing the number of links in the supply chain, limiting interactions with suppliers, centralising delivery systems, accounts and billing, and minimising storage/handling requirements. While these newer arrangements may have potential advantages for certain categories of businesses, the general impression from producers was that restructuring would tend to close out speciality products from small-scale businesses and could dislodge the established personalised market approaches which gave them a competitive advantage.

The producers suggested the need for policy intervention in the following areas which related in part to marketing and promotion of a regional image: a campaign to heighten consumer awareness of food safety, quality and the distinctiveness of handcrafts; initiatives to facilitate the development of producer networking, group or co-operative development; financial and advisory assistance for marketing in general, and county and regional versus national promotion; a need for regulatory distinctions to be made between large-scale and small-scale food processors and greater classification for tourism products; an adequate distribution system to facilitate equitable access to the higher disposable income market and improved road access; provision of assistance for product labelling, presentation and packaging; reduction in bureaucratic procedures; greater recognition of the needs of small businesses; and provision of local retail space for local products.

Organisational support for marketing

The majority of tourism entrepreneurs in both regions maintained links with other producers through membership of at least one local, regional, national or international marketing body. These were primarily quality-based membership groups which often employed full-time marketing staff, charged high fees and took commissions on reservations. The main perceived advantages of membership were increased and wider marketing, and the association with other quality businesses. Membership of marketing groups was less common among crafts producers, except in County Leitrim where Leitrim County Enterprise Board supported group marketing by quality-vetted craftspeople and artists under the *Visual Leitrim* label. Crafts producers, particularly those with established reputations, expressed reservations about joining marketing groups for reasons of time but also because of a proprietary desire to retain influence over the presentation and marketing of their product. Participation in marketing groups among food producers was limited. Group activities in the food, fish and organic sectors served representative, informational and/or supportive, rather than marketing, functions.

Most businesses reported contact with state and private institutions at some stage in marketing, primarily banks and financial institutions, and the main state sectoral and regional agencies. Bord Fáilte was the main source of marketing advice and funding for tourism providers in both regions. In the Northwest, other sources included the European Regional Development Fund, LEADER, County Tourism Committees, an Integrated Rural Development Company, the International Fund for Ireland, and membership groups. Assistance was obtained from Shannon Development, Údarás na Gaeltachta and West Cork LEADER in different parts of the Southwest. Financial assistance was obtained for marketing feasibility studies, inclusion in organisational promotional activities, funding of brochures and attendance at trade shows. Sources of advice for tourism providers included, notably, Bord Fáilte, the Irish Hotels Federation, the Irish Boat Rental Association and the Teagasc farm tourism advisory service.

An Bord Tráchtála was the most important source of financial assistance and marketing advice for crafts producers in both regions. Other sources included the Crafts Council of Ireland, the Arts Council and LEADER companies. Funding for a market research project development course was provided by FÁS in the Northwest. County Enterprise Boards were of particular importance in the Northwest region and especially in County Leitrim where a *Visual Leitrim* marketing initiative was being funded. Activities assisted included the conduct of marketing feasibility studies, the production of promotional materials and especially attendance at the annual crafts fair, *Showcase Ireland*.

At the time of the study, Ireland had a number of state-sponsored agencies for supporting the promotion and marketing of food products.

There were separate boards for food and drink products in general (Bord Bia), fish (Bord Iascaigh Mhara) and vegetables (Bord Glas). However, these did not actually sell products on the market; they acted mainly as 'advocates' and facilitators. Many producers felt that centralised state agencies had not given due attention to the speciality food sub-sector, although the position had improved in recent years. Apart from the promotion and the facilitation of marketing, there were several agencies at national and local levels which provided financial support for setting up a business or for certain necessary functions such as monitoring, staff training or feasibility studies. Furthermore, representational groups, private consultancy companies and financial institutions offered support to businesses.

Regional agencies which provided support for a range of products included Shannon Development and Údarás na Gaeltachta in the Southwest, and the International Fund for Ireland in the Northwest. Contact was reported also with a wide range of local development agencies, notably County Enterprise Boards and LEADER companies. Additional organisational support was available in the Northwest associated with its border-area status.

Suggestions for improved promotion and marketing support

The majority of tourism and crafts businesses found organisations easy to deal with and felt they were effective in product marketing. Producers in both regions viewed the major marketing and promotional agencies, Bord Fáilte for tourism, An Bord Tráchtála for crafts and Bord Iascaigh Mhara for fish (in terms of promotion), as being effective in general, and as being the most powerful actors. Reported difficulties with organisations related in the main to bureaucratic procedures and lack of understanding of the needs of small-scale producers. Marketing support was perceived to be weak. The absence of adequate marketing of particular localities and their products by national agencies was referred to in both regions; Ireland as a country and particular products were emphasised more. Marketing groups were cited as being more effective than state agencies in regional promotion. Organisations were viewed as influencing end consumers and customers, through advertising and market research. Financial assistance in the form of grants from various agencies was viewed as being the best assistance received by the businesses. This included start-up loans, marketing assistance and training grants from FÁS. Assistance from County Enterprise Boards and from international organisations was mentioned more frequently in the

Northwest than in the Southwest.

There were many types of assistance that respondents would have liked to see introduced in the tourism and crafts sectors, a significant proportion relating to marketing support. Tourism providers mentioned training and increased financial and general support for marketing by state agencies as being required to facilitate marketing further. The need for better marketing of particular localities and their products was referred to in both regions. Most food producers focused on the need to increase public awareness of this small sector by highlighting food quality, traceability and safety and the need for stricter controls in food marketing. Also of importance overall was the need for better group organisation, stronger networks, greater unity of approach in dealing with distributors, and regional branding.

Use of regional/place imagery in marketing QPS

In both study areas, producers held mainly positive images of their regions. These related to unspoilt landscape, beautiful scenery, opportunities for leisure activities, and links to culture and history. A negative image in the Northwest related primarily to the absence of a well-defined regional image. It was seen as a place that people passed through, or did not even know exists. Negative imagery in the Southwest related to the over-commercialisation of the region. The majority of producers in the Northwest felt the image of the region could be improved through increased marketing, developing the tourism product and environmental improvements. In the Southwest, most tourism entrepreneurs felt that place imagery could be improved primarily through protection of the quality of the environment which was viewed as coming under increased pressure from tourism.

A majority of tourism and crafts respondents used some form of regional imagery in marketing and believed this strategy could be developed further. The majority used local images, although a number of craft workers used generic Irish images (e.g. mountains, lakes, Celtic imagery, Irish culture and craftwork). A local or regional place name was widely used in the product name by tourism providers and was often linked to physical or cultural features to convey an attractive image of an area. 80% of craft workers in the Northwest and 40% in the Southwest drew on regional images in product design. Craft workers also used regional imagery in packaging, brochures, labels and swing tags. In the majority of enterprises it was the owner who decided, and in most cases designed, the image used. Consultants such as graphic designers were used by a number of respondents.

There was a general awareness of the concept of regional imagery among food producers, but at a superficial level. Producers in the Southwest were more conscious of the idea because of the use of the *fuchsia* symbol as a brand to represent the area developed by the West Cork LEADER Fuchsia Brands Company. However, a majority of food producers linked some form of place name with their products. In its simplest usage, a place name signified location. Extending from this simple use of place there was the use of real places with the addition of some place image as a representation of an identifiable physical feature such as a mountain. Still another usage was an image of a mythical place to symbolise imaginary qualities and identities of a rural Ireland – a rustic setting, sparsely populated countryside, or some attractive environmental feature. Other usages involved more general application of place image such as 'Ireland' or 'countryside'. 'Ireland' was the more appropriate place name when exporting. It was suggested by a small minority of producers that place images were not suitable as a means of representing some products, e.g. confectionery which is better shown by high class photography which accentuates appetising qualities. It may be that what helps in marketing for most food producers was not place imagery *per se* but the association of known and trusted producers with particular places.

Several methods of further use of regional imagery as a marketing strategy were proposed. In the Northwest, tourism entrepreneurs suggested using a wider range of images of the region in their promotional materials, using more marketing tools and developing an identity for the region as methods of developing this marketing strategy further. Some craft workers mentioned tapping further into the *Visual Leitrim* marketing strategy, which aimed to promote a group of craftspeople and artists in a particular county drawing on the visual and craft dimensions of their work. Tourism entrepreneurs in the Southwest suggested using a wider range of marketing tools with regional imagery and developing the product in the region, thus enhancing the regional image. Respondents in both sectors in the Southwest proposed a group of producers coming together to jointly develop a regional label or tapping into the LEADER-initiated West Cork regional label, the *fuchsia* symbol. Craft workers in both regions suggested using a wider range of images of the region, either in the product itself or in promotional materials, and greater promotion of the area. Food respondents generally could see potential in the use of regional imagery; the Southwest was already using it. Food branding was identified as a means of promoting the area as a tourist destination but the degree of real commitment remained questionable. The initiative in the Southwest was artificially boosted by the incentives offered through the LEADER programme, e.g. subsidies for labelling, training in HACCP. Many replies indicated that collective organisation could deal with more urgent tasks than marketing, e.g. transport, lobbying, dealing with officialdom. Most small food producers spent considerable time and effort establishing markets through personal contacts and they considered that market success depended primarily on elements of quality and on their own efforts. In that context the use of common symbols of territory (as distinct from local place names) would not be highly regarded as contributing much to market success. On the other hand, if traceability to place of origin and to producer became a requirement in food retailing, then identification of products with 'real' places would have new significance and speciality producers would gain a distinctive competitive advantage.

Almost all the tourism respondents and over three-quarters of the craft workers expressed a willingness to participate in collaborative efforts with other local businesses to develop a regional imagery-based marketing strategy. However, the benefits of membership of national sectoral marketing groups tended to inhibit membership or development of regional groups. There was also widespread interest in forging collaborative links with counterparts in other European countries. Food producers, although with quite a few exceptions, would be willing to work in collaboration but there remained the question of who would take the lead, or who had the time. Some suggested that LEADER or state agencies should take on the task of organisation.

3.5 Summary

The majority of the 166 surveyed SME businesses, which produced QPS in the Northwest and Southwest regions of Ireland, were profitable and had grown in output and employment over time. Most had also expanded, developed or upgraded their product since establishment. Output and turnover for many of the farm tourism and some of the crafts, organic and food producers were low. Nevertheless, producers in these sectors in general felt that their marketing had been successful to date, although many expressed a need for professional advice, financial assistance and marketing training.

Respondents tended to derive their competitive advantage from focused differentiation – concentrating on producing niche, quality products which were differentiated from mass produced products. The distinctiveness of the product/service stemmed from the raw materials used, the producers' attention to detail and craftsmanship in the production process, and their concern with maintaining quality and adding value as opposed to volume. There was a high incidence of official quality certification among tourism and crafts producers. In general, in-house quality monitoring on an ongoing basis was carried out by the owner. Personal recommendations and references in the media were viewed as being more influential than official certification of quality in marketing products and services. The market orientations and marketing strategies of the entrepreneurs varied by sector, product type and stage of business development.

Regional promotion based on regional imagery is not very well developed within Ireland where promotional agencies concentrate more on developing a national identity for international markets. The beauty of the scenery, unspoilt landscapes and rurality were the predominant images of both regions, but, overall, the Southwest was seen as having a more positive image than the Northwest. Most tourism and crafts respondents expressed a willingness to participate in collaborative efforts to develop a regional imagery-based marketing strategy which would promote the region and provide the benefits of joint marketing. A large part of their individual marketing strategy was built on individuality, reputation or craftsmanship and, as such, many would wish to be associated only with products of a similar quality. In general, food producers did not perceive a need for the development of regional branding for quality products as necessary to their future market success. Producers were willing, in principle, to participate in synergies and they acknowledged the potential contribution such group co-operation could make to both the development of their enterprises and to asserting their position in the hierarchy of market relations.

Chapter 4: Institutional Context in Which Quality Product and Service Businesses Operate

4.1 Introduction

At the time the research was conducted, the institutional environment at both EU and national levels provided considerable support for the development and maintenance of quality products and services in rural areas and for their marketing, as illustrated by the wide range of support measures that were in place (Section 2.4). This chapter presents a profile of the organisations surveyed, in terms of their structure, aims and objectives, allocation of resources, and support and development of SMEs. In particular, it focuses on organisations' promotion of quality among businesses, their promotion and marketing activities, and their use of regional imagery.

4.2 The Organisations Surveyed

Based on pertinent documentary source materials, the information provided by the entrepreneurs, and consultation with experts, the organisations involved with the production, quality features, and promotion and marketing of QPS in the study regions were identified. These included state agencies and local authorities, private and public companies, and co-operatives. Some 41 organisational units were selected purposefully as being those most closely involved with supporting the types of QPS businesses surveyed and best able to provide the information targeted by the research questions. They included organisations with a national geographical remit, but those with regional and sub-regional remits tended to dominate: 15 organisations had a remit for the Northwest region, 12 for the Southwest, and 14 had a national remit. Two representatives were interviewed in one organisation, giving a total of 42 interviews.

The organisations interviewed included:

(i) national state and semi-state sectoral organisations and agencies and their regional branches: Organic Unit of the Department of Agriculture and Food, Crafts Council of Ireland, Arts Council, Bord Iascaigh Mhara;

(ii) national promotional and marketing agencies and their regional branches: Bord Bia, An Bord Tráchtála (now absorbed into Enterprise Ireland);

(iii) national and regional sectoral and multi-sectoral development agencies and their regional offices: Irish Organic Farmers and Growers Association, Organic Trust, Regional Tourism Authorities, North Western Regional Fisheries Board, International Fund for Ireland, West Business Innovation Centre, Teagasc National Food Centre, Teagasc Sligo Service, Teagasc Food Enterprise Service, Teagasc Rural Tourism Advisory Service, Forbairt (now absorbed into Enterprise Ireland), Údarás na Gaeltachta;

(iv) national and regional private membership PMGs in the tourism and food sectors: Ireland's Blue Book, The Hidden Ireland, Irish Country Holidays, Real Foods of Ireland, Cáis, South West Ireland Golf Limited, West Coast Links, *Úna Bhán* Tourism Co-operative;

(v) sub-regional development companies (County Enterprise Boards, LEADER and Partnership companies) which included partnerships of local voluntary, statutory and business interests in most cases;

(vi) other groups: North Leitrim Vegetable Growers Association, Fuchsia Brands Company.

Some of the multi-sectoral organisations were interviewed for a particular sector only (Table B.1, Appendix B).

Most of the national organisations focused on a particular type of QPS or on a specific QPS (SQPS) and a majority had promotional and marketing functions (Table B.1). The organisations selected for the handcrafts sector at regional level tended to have general business support functions. Rural tourism organisations had a QPS/SQPS focus and promotion and marketing functions. The organic food production organisations had quality development functions. The four national speciality food organisations had broad roles in promotion and marketing, quality development and representation. Sub-regional organisations tended to be multi-sectoral (i.e. deal with more than one QPS-type) with an SME business support role.

Aims and objectives of organisations

Organisational values are expressed through broad aims and more specific objectives. Many organisations had a broad area or sectoral developmental role. Organisations with an SME remit tended to combine a development aim with a general aim relating to various aspects of business support (Table 4.1). Organisations focused more specifically on QPS or SQPS tended to have promotion/marketing as their main aim. Aims relating to regional imagery were limited to one QPS focused organisation. Several SQPS organisations had representational objectives.

The aims and objectives of statutory organisations and partnerships were developed within frameworks determined by the relevant government departments, as stated within National Operational Programmes (approved for funding by the EU under Community Support Frameworks and EU Community Initiatives such as LEADER). The three Regional Tourism Authorities surveyed were public limited companies partly funded by a government subvention. The various tourism, food and organic production private organisations and co-operatives were funded by their members or, in cases, by EU/state grant aid. Policy was largely set by members.

Some Boards of Directors provided for inter-organisational linkages, notably those of LEADER companies and County Enterprise Boards which included local statutory, business and community representatives. The Boards of the statutory bodies generally consisted of sectoral representatives and government appointees. The Regional Tourism Authorities' Boards were composed of sectoral representatives, whilst private organisations tended to elect their executive from their members. Inter-organisational linkages served to encourage integration and reduce duplication, particularly in sub-regional partnerships.

In the case of the multi-sectoral (mainly partnerships) and statutory organisations, pertinent changes in aims and objectives and subsequent changes in types of assistance provided, in the 20 years preceding the survey, related to changes in national and EU policy and the increased availability of funding. Policy changes included an increased focus on SMEs, on marketing as opposed to development, a move to create competitive companies, and an increased role in administering EU funds. In general, private organisations' aims and objectives had not changed over time.

Table 4.1 Principal aims and objectives of organisations, by target business type

Aims and Objectives	Businesses in general	SMEs	QPS types	SQPS	Total number
Area/social/sectoral development	✓✓✓✓	✓✓✓✓	✓	✓✓	**11**
1. to promote rural social development	✓✓✓	✓✓✓✓✓	✓✓	✓	11
2. to promote rural economic development	✓✓	✓✓✓✓✓✓	✓✓	✓✓✓✓	14
3. to promote regional development	✓✓✓		✓	✓	5
4. to promote sectoral development			✓✓	✓✓✓✓	6
5. to empower marginalised groups		✓	✓		2
6. to make input into policy formation	✓✓	✓	✓✓✓✓✓	✓✓	10
General business development	✓✓	✓✓✓✓✓✓	✓✓✓✓✓		**13**
1. to create a climate conducive to business		✓✓✓✓✓✓	✓✓	✓	9
2. to establish businesses			✓	✓✓	3
3. to expand businesses			✓	✓	2
4. to assist producers/providers in establishing businesses	✓✓✓	✓✓✓✓✓✓	✓✓✓✓✓ ✓✓	✓✓✓✓	20
5. to assist producers/providers in expanding businesses	✓✓✓	✓✓✓✓✓✓	✓✓✓✓✓ ✓	✓✓✓✓	19
6. to develop new products		✓✓	✓	✓	4
7. to create/safeguard employment, directly or indirectly	✓✓	✓✓✓✓✓✓	✓✓✓✓✓ ✓✓		15
8. to attract inward investment	✓				1
9. to promote networking between producers		✓✓✓	✓✓✓	✓✓✓	9
10. to link with other organisations		✓✓✓✓	✓	✓	6
Quality				✓	**1**
1. to promote quality as a feature of products and services (i.e. facilitation)	✓		✓✓✓	✓	5
2. to regulate quality by statute				✓✓✓	3
3. to regulate quality through non-statutory mechanisms			✓✓	✓✓✓	5
4. to promote networking between producers	✓		✓✓	✓✓	5
5. to develop new quality products				✓	1
Promotion/marketing of QPS	✓✓		✓✓✓✓✓ ✓	✓✓✓✓ ✓✓✓	**15**
1. to promote/market products/services or increase consumption directly	✓✓		✓✓✓✓✓ ✓✓	✓✓✓✓ ✓✓✓	16
2. to promote/market products/services or increase consumption indirectly	✓✓		✓✓✓✓✓ ✓	✓✓✓✓	12
3. to promote networking between producers/providers	✓✓		✓	✓✓✓	6
4. to promote networking between producers/providers and consumers/customers			✓✓	✓✓✓	5
Regional imagery for marketing QPS			✓		**1**
1. to promote a region or its products/services through direct use of regional imagery			✓		1
2. to support producers/providers in their promotion of a region or its products/services			✓		1
3. to promote networking between producers					-
Retailing QPS products					-
1. to retail products/services					-
Representation					-
1. to represent members' interests			✓	✓✓✓✓ ✓✓	7

4.3 Support and Development of SMEs

Table 4.2 Support provided by organisations to SMEs, by region and sector

Organisation by sector	Main forms of assistance provided					Retailing	Represents producers
	Advice	Funding	Training/ education	Technical assistance	Organisation works on behalf of producer		
Northwest							
Crafts	M	M		M	M		
Fish							
Food	B, Q, M, **B**, **Q**		B, Q	B, Q, M			
Organic	B				M, I, N	✓	
Rural tourism	3B, 4Q, 2I, 5M, N, **2B**, **Q**	2B, 2M, I, N	B	2M, I	Q, 5M, 5I, 3N, **M**	✓	✓
Multi-sectoral	6B, 3M, 2I, 5Q, N, **N**, **3B**	6B, 4M, 2I, N, **N**, 2Q, **2B**, **M**	6B, 3M, 5Q	3B, 5M, Q	4N, 3M, 3I		
Southwest							
Crafts	2B, 2Q, I, M, **M**	2B, 2Q, 2M	2B, Q, 2M, **M**	2B, Q, 3M	2M, N		
Fish							
Food							
Organics							
Rural tourism	3M, 2B, Q, 2N, I, **2B**	2B, 2M, 2N		2M, 2I, N	3M, 3N, 3I	✓	
Multi-sectoral	5B, 5M, 4N, 2I, 3Q, **B**	4B, 2N, 3Q, 3M, 2I, **M**	5B, N, M, 4Q, **B**	4B, 4M, 3I, 2Q, **M**, **Q**	5N, 4I, 3M		
National							
Crafts	2B, **2B**, **M**, N, M, Q	B, M, **B**, **M**	B, Q, **B**, **Q**		M	✓	
Fish	B, Q, M, **B**	B, M	B	B	M, I		
Food	2B, 2M, 3Q, N, **M**, **2B**	M	Q		2M, 2N, 2I		✓ ✓
Organics	3B, 3Q, 2M, 2N, **2B**, **Q**	3B, 3M	2B, 2Q, **B**	Q	2M, 2N		
Rural tourism	3B, 4Q, 2M, N, **2B**, **2M**		N, B, Q, M		N, 3M, 2I, **I**, **M**	✓ ✓ ✓ **✓**	✓ ✓ **✓**
Multi-sectoral	B, Q, **B**, **Q**		Q, **Q**, **B**	Q, **Q**			

Key: B = General business development M = Promotion/Marketing
Q = Quality promotion I = Promotion of regional imagery
N = Promotion of networking

Organisations that support/assist other organisations rather than producers are recorded by using the same keys underlined and in bold, i.e. **B**, **M**, **Q**, **I**, **N**

The widest range of organisational assistance for SMEs was available from regional multi-sectoral organisations (County Enterprise Boards, LEADER and Partnership Companies and Teagasc regional offices) (Table 4.2). Advice, funding, training and technical assistance for general business development, quality, promotion and marketing, networking and use of regional imagery were provided. The amounts of financial assistance available were limited and specialist training was usually provided through other agencies. There was a wider range of assistance available in the Northwest than in the Southwest, and to tourism providers as compared with crafts, food and organic production producers.

National sectoral organisations tended to support general business development and promotion/marketing for both start-up and expanding businesses. The food and organic production organisations also provided assistance for quality development and regulation. National tourism PMGs supported established businesses only. At a regional level, most organisations supported new and expanding businesses of any size through a comprehensive range of actions. In the speciality foods and organic production sectors, business development, quality and marketing assistance were provided to micro businesses and SMEs, both start-up and expanding. The regional crafts organisations had marketing and business development remits but a minimal proportion of support went to QPS. The Crafts Council of Ireland, the North Leitrim Vegetable Growers Association and the Regional Tourism Authorities provided retailing assistance.

Budgetary and time allocations

Only general observations may be made about budgetary and staff allocations because of a paucity of data relating to QPS. Up to 80% of the budgets of County Enterprise Boards and LEADER companies were spent on grant aiding micro-enterprises and SMEs; up to 25% was spent on training and education and less than 10% on direct marketing support. Tourism businesses tended to fare better than others in the Northwest and food businesses in the Southwest, where education and training received particular emphasis. West Cork LEADER in the Southwest spent almost 50% of its food marketing budget on developing the use of regional imagery.

QPS come within the remit of the major state and regional promotion and marketing agencies, but accounted for only small proportions of expenditure. The Teagasc regional units mainly provided advice and assistance for education and training, quality development, and promotion and marketing. The North Leitrim Vegetable Growers Association allocated most of its budget to maintaining a retail outlet for its members. Tourism PMGs spent all of their relatively modest budgets promoting and marketing a small number of specific QPS producers.

Most organisations charged fees when services were provided, for example, for training courses, although partnerships usually charged a nominal fee only. An Bord Tráchtála charged full-cost fees to clients for market research and for market information. Two of the national organic production organisations charged full-cost fees for inspection, certification and membership. Most tourism PMGs charged fees: application fees, booking fees where applicable, membership fees (which could be substantial) and inspection fees in one case. Allocations of staff time to general business development were greatest in multi-sectoral organisations, whilst time devoted to promotion/marketing was greatest in the specialist PMGs.

The factors that contribute to business success

Respondents were asked what factors contributed to business success among SMEs in the selected sectors. The most frequently mentioned factor in both regions was the product or service provider, their characteristics, skills and personality. Characteristics of the product in terms of quality, design, uniqueness and method of production were also mentioned often, as were aspects of marketing and access to markets.

According to the respondents, the most successful types of businesses in the Northwest were pottery, jewellery, coarse angling and some food businesses. In the Southwest, tourism, small-scale food, pottery, jewellery and knitwear producers were identified. Perceived advantages of the Northwest for such businesses were the unspoilt natural rural environment, culture, heritage and, increasingly, a culture of arts and crafts which was attracting crafts and speciality foods and organic foods entrepreneurs. The speciality foods and organic production organisations felt, however, that the region had no particular advantages. In the Southwest, the most frequently mentioned advantages included its highly developed tourism industry and identity, the quality of the environment, and the image of West Cork as a source of quality foods. The most frequently mentioned disadvantages of both regions related to distance from major markets and remoteness. A lack of identity was referred to in the Northwest and the 'mass' nature of tourism in the Southwest. Various strategies were suggested to offset these disadvantages: actively marketing the area to create a branded image in the Northwest and producer networking for distribution in the Southwest.

A number of organisations in the Southwest identified crafts producers as experiencing business difficulties arising from viewing their profession as a lifestyle choice rather than a commercial decision. A lack of technical advice for small fish producers was identified. Problems identified by food and organic production organisations, apart from distribution, included a lack of business skills and technical and market information, and cash flow problems, the fact that food legislation is geared towards large-scale businesses at a national level, and a lack of networking. Specific problems identified by tourism organisations included a lack of ongoing funding for PMGs and thus a dependence on voluntary labour, a lack of management skills and a lack of professionalism in some tourism businesses, inadequate transport infrastructure, and difficulties in collecting monies due from intermediaries. Food and tourism organisations provided a range of supports to help combat the problems identified.

Private inward investment by immigrants was seen as an important source of investment for organic production and crafts in the Northwest and for large hotels and other attractions in the Southwest. The factors identified as contributing to innovation included EU funding and the high rates of growth in the Irish economy. Specific factors in the Northwest were education and training, competition, international trends, market demand, the availability of funding, and producer networking. In the Southwest, innovation was linked to increased competition, management skills, market demand, a growing appreciation of local products, and the existence of a culture of innovation. The food sector was mentioned as being particularly innovative in both regions.

The factors identified as inhibiting innovation were similar in both regions and related to the absence of a tradition of entrepreneurship or the "rural Ireland dependency psyche" as one interviewee put it, aversion to risk, a lack of education, a deficit of skills and knowledge of the market place, the absence of a large market, a shortage of finance, "the punitive attitude on the part of state structures which mitigates against entrepreneurial skills", outmigration of the more educated, restrictive building regulations and a lack of technical support.

4.4 The Promotion of Quality

Organisations' definitions of quality and its promotion among producers

The two definitions of quality most often used by organisations were meeting consumer/customer requirements and meeting regulatory standards. Food hygiene and achieving HACCP accreditation were mentioned most frequently by fish and food organisations, along with characteristics of the product, raw materials and the producer's personal inputs. Organic production organisations referred to adhering to organic methods of production rather than 'quality' *per se*. Other definitions mentioned in relation to tourism included characteristics of the product and owner, the quality of marketing, meeting international standards, and quality of staff and service. In the case of crafts, characteristics of the products and professional jurying by peers were mentioned.

Quality was promoted through statutory regulation, non-statutory regulation and less formal facilitatory actions. The North Western Regional Fisheries Board implemented state regulations. The Regional Tourism Authorities in both regions required compliance with Bord Fáilte regulations as a condition for providing assistance, and they inspected and approved single self-catering accommodation units and awarded a 1 to 4 star rating. Hidden Ireland inspected and approved speciality accommodation. The organic production organisations promoted the organic system of production which is a 'total' production process, and one national food organisation required a 'total quality' approach to production as a condition of membership.

The Crafts Council of Ireland promoted quality through peer review procedures which determined entry to a Crafts Village at its annual *Showcase Ireland* trade crafts show, receipt of a Quality Commendation label at the same show, and inclusion in its retail gallery and computer based Mediastore. The Crafts Council also promoted quality via training programmes delivered through the County Enterprise Boards. The Teagasc National Food Centre and regional organisations provided advice, technical assistance and training to food producers and required compliance with regulations as pertinent. The Real Foods of Ireland and the tourism PMGs (for golf and accommodation) required compliance with their own regulations as a condition of membership, and quality promotion was long established as part of good marketing practice in tourism.

Multi-sectoral organisations promoted quality primarily through requiring compliance with quality regulations, as a condition for providing grant assistance, and through advice and training. Leitrim County Enterprise Board and the Fuchsia Brands Company specifically grant aided quality development. West Cork LEADER had developed a set of quality criteria and codes of practice for tourism and food products to determine eligibility to use the *fuchsia* brand label, which included approval by, and membership of, the relevant professional body, installing a certified quality control programme (for food), and sourcing of local raw materials. Many organisations provided training to achieve ISO9000 marks but few QPS businesses applied for these. HACCP training courses were also provided in West Cork as part of the *fuchsia* scheme. Barriers to quality promotion identified by the speciality foods sector in the Southwest included the cost involved in complying with regulations.

Several methods were used to ensure compliance with regulations which included annual audits and on-going monitoring, peer jury quality appraisal, inspection, registration and monitoring of complaints, patrolling and monitoring of water quality, withholding of grant aid, withdrawal of labels, licenses and membership, and prosecution.

4.5 Promotion and Marketing of QPS

Promotion and marketing with particular reference to QPS

The ways in which organisations contributed to the promotion and marketing of QPS varied depending on their remit and policy roles. The national handcrafts, fish, food and tourism agencies had primarily promotional functions and provided consultancy and market research, and organised a wide variety of trade opportunities, although some of their remits were not QPS specific. Cáis promoted its members at trade fairs and made presentations to customers. The North Leitrim Vegetable Growers Association marketed members' produce through its retail outlet. Two organic production organisations attended trade fairs and the Organic Unit funded the production of promotional literature. The Regional Tourism Authorities in both regions provided visitor services such as tourist information offices, gave marketing advice to individuals, supported a range of trade fora opportunities, and produced a generic series of promotional literature. The North Western Regional Fisheries Board had a marketing budget under the Operational Programme for Tourism. PMGs in general provided marketing advice and literature to members, marketed their products and services and represented them in marketing fora. The allocation of dedicated personnel to QPS promotion and marketing was limited in the main to the specialist marketing groups.

Multi-sectoral organisations provided a range of supports to businesses in general for marketing and some also executed specific sectoral programmes. In the Northwest, Leitrim County Enterprise Board's *Visual Leitrim* initiative had a strong promotion and marketing element and the County Enterprise Board had also developed a programme for branded tourism. Sligo LEADER Partnership had supported a local crafts network in opening a retail outlet and prioritised the marketing of tourism by funding the Marketing Sligo Forum. In the Southwest, West Cork LEADER was funding a co-ordinated promotion and marketing campaign to promote the *fuchsia* brand and South Kerry Partnership had introduced a marketing programme for tourism using standardised brochures, the *Ring of Kerry* logo and a web-site. This Partnership had also funded individual food producers and groups for marketing.

Promotion and marketing strategies

Many organisations emphasised quality features in their marketing of the selected products with the aims of establishing a niche market, diversifying the market and increasing profits. Quality features emphasised by a majority of food and tourism organisations, as being conducive to effective marketing, included the unspoiled, natural environment, quality marks and certification of products, rurality, scenery, region of origin and, in relation to foods, handmade, freshness, flavour, speciality, traceability, commitment of producer and uniqueness. Crafts organisations referred also to product design, variety, uniqueness, quality of materials, and 'Irishness'. Bord Iascaigh Mhara emphasised natural resources, the clean environment and product qualities such as 'low in calories' and 'healthy'. The national organic production organisations simply emphasised the organic method of production. Tourism organisations also emphasised the whole holiday 'experience'. Aspects of place were seen as being more important in marketing quality products by regional than by national organisations; many of the latter viewed Ireland as a location as being crucial.

The importance of intermediaries in the marketing chain of all QPS types was recognised by organisations in both regions: retailers for crafts, food and organic products; agents for fish products; and tour operators for tourism services. Some tourism organisations worked with tour operators in joint promotions. Links with buyers were of importance for providing consumer and customer feedback and well-developed strategies were in place for all products and services. However, the Fuchsia Brands Company was the only food sector organisation in the regions to have integrated its marketing efforts with those of producers, through its branding initiative. Nationally, many of the food and organic production organisations joined producers at promotional events, and the organic production organisations' symbol was used by producers. Tourism PMGs tended to work with the Regional Tourism Authorities and producers at the regional level.

4.6 Use and Support of Regional Imagery in Marketing

The image of the regions

The regional image held by the organisational respondents in the Northwest related to the region's physical features, its rural, unspoiled nature and strong cultural identity (particularly for tourism) and as being a late developer in terms of business. Leitrim and Roscommon had a more peripheral image than had Sligo. Crafts organisations saw the region as having a mix of physical and human resources, but as being underdeveloped in terms of crafts. The speciality food sector organisations described the region as being remote from markets but as having an enterprising population. The North Leitrim Vegetable Growers Association described the region as a good area for growing a variety of vegetables.

In the Southwest, two images of Kerry emerged: as having a vibrant industrial sector with a high quality environment and way of life on the one hand, and as lightly populated, peripheral, with a lack of entrepreneurial activity and structural difficulties on the other. West Cork was seen as being cosmopolitan, upmarket, clean, green and unspoiled; with beautiful scenery, friendly people, an extensive array of speciality food products, expertise and entrepreneurial immigrants, but a presence of attitudes of 'begrudgery'. The image of the Southwest held by crafts organisations varied from being a good location to set up a crafts business, to being rich in potential but poor in delivery. The national fish organisation spoke of the region in terms of its remoteness, extensive coastline and active fishermen's associations. Tourism organisations referred to scenic beauty, environmental quality, good external air and sea access, product quality, and history, but as being a seasonal tourist area which was becoming locally over-commercialised. National food and organic production organisations described Ireland as a whole as clean, green, natural and unspoiled.

Use of regional imagery in marketing

Regional imagery was used by several organisations in promoting QPS. Pastoral and marine images of Ireland were used in overseas promotions by the main state food, fish and tourism promotion and marketing agencies. Most of the tourism organisations used regional labels, and all used regional imagery generally in their promotional work. Images included that of a romantic legend (Úna Bhán) to link with local culture and create a unique identity; and images of natural and cultural features and rural recreational opportunities. Cork Kerry Tourism had begun co-ordinating its imagery with the Bord Fáilte 'Brand Ireland' image.

In the Northwest, regional brands had been developed for crafts (*Visual Leitrim*) and tourism ('Leitrim tempts you to take a closer look', 'Sligo land of heart's desire'). In the Southwest, as well as the *fuchsia* brand developed by West Cork LEADER, South Kerry Partnership had developed a series of standardised tourism brochures in consultation with communities.

The allocation of staff time to the use of imagery was minimal except in the case of branding (*Visual Leitrim*, *Fuchsia* brand) and in the national fish, food and tourism promotional agencies. Marketing and advertising consultants, graphic designers and photographers, together with in-house marketing experts, were used by organisations in designing promotional materials. Images were used primarily in promotional brochures and headed paper, but also in a variety of media campaigns and on the Internet.

Organisational support for the use of regional imagery by entrepreneurs included assistance in using the various brands and with brochure and catalogue production, advice on the use of imagery, and facilitating contacts with designers. Údarás na Gaeltachta in the Southwest assisted the production of promotional materials in Irish. The Fuchsia Brands Company funded the use of its brand by approved producers; the quality aspect was seen as most important and the imagery was used to portray this.

Most multi-sectoral organisations were aware of measures introduced by the EC (PDOs and PGIs) to encourage the use of linkages to the region in marketing QPS. In the Northwest such measures were viewed positively. In the Southwest, the level of success was felt to depend on the resources committed because, currently, most producers and consumers were not aware of such measures. There was a high level of awareness among fish, food and organic production organisations of the PDOs and PGIs, but none felt they would have any effect on the short to medium term promotion and marketing of QPS. A national food and a national organic production organisation felt that Ireland should be treated as a region in itself. Tourism organisations generally had low levels of awareness of EC labels, although benefits were perceived to attach to regulating quality, creating links between products, and strengthening marketing and promotion.

The factor considered as being most important in promotion and marketing for products in general was product quality and its various expressions in different products, as noted in Section 4.4, and the marketing strategies used. Links to place were considered to be important in terms of creating an association between the region and quality products and services, in building a competitive advantage for the region and in giving the product a unique identity. It was seen as being most important for food products by multi-sectoral organisations in the Southwest, but most of the food organisations saw it as less important than other elements, particularly quality. However, the importance of links to types of places, e.g. unpolluted seas, and Ireland as a place, was recognised by some. 'Place' was not seen as important by crafts, fish or organic production organisations. Links to specific places were seen as important by most of the regional tourism organisations, whilst use of generic images of Ireland and rurality were seen as more important by national PMGs.

4.7 Summary

Representatives of 41 organisations which were closely involved with the selected products and services were interviewed. Some of the organisations had a primarily promotion, and/or marketing focus, whilst others performed these roles as part of broader remits. Some dealt exclusively with specific QPS, whilst others dealt with products and/or services more generally. Both regions were viewed as possessing the natural advantage of high environmental quality which was conducive to the promotion of QPS. Distance from major markets was a perceived problem in the Northwest and the over-development of tourism was a feature of selected areas in the Southwest. The business climate in both regions was enhanced by the presence of state organisations and partnerships which intervened in numerous ways to help producers overcome natural and structural disadvantages. There was a perceived deficit of marketing skills among producers in both regions that the organisations sought to offset. The range of supports provided had increased since the late 1980s in association with the increased allocation of EU Structural Funding to Ireland. The Northwest region enjoyed additional funding for promotion and marketing associated with its situation bordering Northern Ireland. Group marketing activities and regional branding were viewed as being of increasing importance to enable quality producers achieve economies of scale in marketing and in distribution, and to create market differentiation.

Several of the surveyed organisations had statutory roles relating to the regulation of quality, most notably in the food, organic production and tourism sectors. Non-statutory regulation, which frequently exceeded statutory requirements, was promoted primarily by private tourism PMGs.

Both regions provided examples of the recent adoption of branded marketing using regional imagery, most notably for tourism but also for food and handcrafts. Examples of the latter included the *fuchsia* symbol awarded by the West Cork LEADER Fuchsia Brand Company, for quality-vetted food and tourism products, in the Southwest; and the *Visual Leitrim* symbol, promoted by Leitrim County Enterprise Board for quality crafts, in the Northwest. The Regional Tourism Authorities pursued regional branding actively.

The consumers' perception of QPS and their response in terms of actual purchases are documented in Chapter 5.

Chapter 5: Perception and Purchase of Quality Products and Services

5.1 Introduction

This chapter describes the sample of 397 consumers surveyed, and discusses their perceptions of quality and awareness of quality labels and region of origin as quality indicators. Consumers' perceptions of and purchase practices in relation to quality regional products are examined. Finally, consumers' observations on regional imagery and their views on quality products in the study regions are reviewed.

5.2 Sample of Consumers

In order to achieve a stratification of the sample, consumers were selected according to age, gender and socio-economic features, with an attempt to get a balance between different groups of consumers. In addition, a purposive sampling method was adopted to ensure a minimum of 50 consumers of regional QPS (i.e. 'adopters'). This was to help gain a full understanding of consumer perceptions and behaviour relating to the selected study products/services. As the demand for QPS is not restricted to the study regions, it was also decided to include consumers located in larger urban centres adjacent to the study areas and in Dublin as the largest city. Interviews were conducted in the interviewee's place of residence. This helped to ensure that all socio-economic groups, as well as adopters of regional QPS, were properly represented in the sample. 397 consumers were interviewed in total.

The entire sample was over 18 years of age and the majority were less than 65 years (Table 5.1). About two-thirds formed part of a couple, generally with children. Over half had third level education and tended to be either professionals, employed at managerial level, or self-employed. This reflected the deliberate bias of the sample in favour of middle and upper socio-economic groups and the general high level of educational achievement among the under 35 year old age group in the population. Respondents were either the main decision-maker in the household for the purchase of quality products or the joint decision-maker in 80% of cases.

Table 5.1 Profile of sample

Respondent characteristics (%)	Northwest	Southwest	Total
Place of residence			
Resident in study region	53.8	63.4	58.7
Resident outside study region with no roots in region	45.6	36.2	40.8
Resident outside study region with roots in region	0.5	0.5	0.5
Age			
18-24	13.9	18.9	16.5
25-34	21.6	22.4	22.0
35-44	29.9	26.4	28.1
45-64	21.1	24.9	23.0
65+	13.4	7.5	10.4
Gender			
Male	42.1	42.1	42.1
Female	57.9	57.9	57.9
Occupation of head of household			
Not employed (Housewife, student, retired, unemployed)	17.4	11.4	14.0
Self employed (Farmer, business owner)	16.9	12.9	14.9
Employed professional or management	42.1	48.0	45.1
Other employed position	23.6	27.7	25.7
Educational level			
Primary level	1.6	4.5	3.0
Secondary level	42.0	43.1	42.6
Third level	56.5	52.5	54.4
Household status			
Single	29.2	27.7	28.5
Couple	19.0	15.3	17.1
Single with dependent children	5.6	6.4	6.0
Couple with dependent children	44.6	50.0	47.4
Other	1.5	0.5	1.0
Main decision-maker in household for purchase of QPS			
Yes	55.7	58.4	57.1
No	20.3	19.3	19.8
Joint	24.0	22.3	23.1

5.3 Consumer Perceptions of Quality

Examples and types of quality products

To gain an understanding of how consumers define quality, respondents were asked to give examples of products they considered represented 'quality'. Consumers were asked to give examples of food and drink, crafts and tourism products. Consumers generally gave more than one example of a quality product (quantitative analysis is based on the total number of responses given), providing an eclectic range of products representing their definitions of quality. To aid analysis, responses were re-coded to form more meaningful but broader categories of responses.

Consumers stated that they expect a basic quality standard from all foods they buy. More than two out of three quoted either an international, national or regional branded product when asked to give an example of a quality food or drink product. Brands were seen as an important symbol of quality assurance. This emphasis on the importance of brands was not surprising as Irish consumers have a strong bias towards branded food products. The self-employed tended to be more brand conscious than other socio-economic groups, whereas the lower socio-economic groups were least brand conscious. Respondents less than 25 years of age were less likely to quote "Irish made" as a quality product than older age groups. These brand conscious young consumers were more likely to nominate international brands, which reflected their lifestyle, as examples of a quality food. Consumers in the over 65 age group associated Irish beef and lamb, and domestically grown vegetables with quality. Middle-class females were more likely than other consumers to quote a speciality food product as a quality product.

Over 80% of responses included an example of an Irish crafts product. Irish crystal was the most frequently nominated example of a quality crafts product. Age of consumer generally influenced the type of crafts product nominated. The lower socio-economic groups, the under-25 year olds and the over-65 year olds were least likely to buy crafts products. Younger consumers gave examples of less expensive and contemporary pottery products whereas older consumers purchased traditional Irish crystal and china. Females tended to be most knowledgeable about crafts products and more familiar with the work of specific craft workers than males. Females particularly favoured contemporary pottery.

Respondents nominated a wide range of quality tourism products, ranging from hotel and restaurant facilities to the services of travel agents. Almost 45% mentioned an accommodation product when describing a quality tourism product. The lower socio-economic groups were more likely than other socio-economic groups to give a public amenity such as a national park as an example. Household status appears to be the best indicator of what quality tourism product examples were presented. Households with children nominated child friendly hotels and restaurants whereas childless couples nominated certified regional accommodation as quality tourism products.

Indicators of quality

Respondents were asked in a series of open-ended questions to indicate what they perceive to be the characteristics which defined quality products. They generally identified between two and four characteristics. Responses were re-coded into categories based on subjective and objective attributes identified in Section 1.4 as marketing perspectives on quality (Table 5.2).

Table 5.2 Quality indicators

Quality Indicators	%
Attraction: Generating attraction by tapping into the subliminal wants of consumers, e.g. designs, texture, taste, freshness, price, consumer perception	60
Specification: Ensuring specification of production method (e.g. small-scale workshops) or use of raw materials (e.g. local wool) or ownership of the enterprise.	22
Certification: Achieving certification by a professional organisation, government or other external bodies e.g. quality mark, organic symbol, and self-regulation.	11
Association: Establishing association either geographically with a region or historically with a tradition or culture e.g. using traditional methods or skills in the production of a product.	6
Other	1

Six out of ten consumers indicated that 'Attraction' was the most significant element of quality. 'Value for money', 'freshness of the product', 'taste/flavour', 'consistent quality', and 'good presentation', were generally the most important indicators of quality. Consumers considered 'value for money' to be a trade-off in price for perceived quality. Customer care and service were considered to be an intangible but important aspect of quality.

The four quality indicators were cross tabulated by age, gender and socio-economic status. All age groups gave 'Attraction' most mentions. The 25-34 year age group was most likely to list 'Attraction' as an indicator of quality. While 44% of 18-24 year olds listed 'Attraction' as a quality indicator, over one-third also nominated 'Specification'. Gender or social class did not appear to influence consumer perceptions of the indicators of quality.

Attitudes towards price and quality

Respondents generally expect, and consider it worthwhile, to pay extra for quality products and services (Table 5.3). While consumers in the Northwest were not as strongly in agreement with consumers in the Southwest that quality products cost extra, they were as willing to pay extra for such products.

Table 5.3 Attitudes towards price and quality (%)

		Northwest	Southwest	Total
I generally expect to pay extra for quality products and services				
	Agree strongly	8.2	19.1	13.7
	Agree somewhat	59.8	57.8	58.8
	Disagree somewhat	20.6	16.6	18.6
	Disagree strongly	11.3	6.5	8.9
I think it is worth paying extra for quality products and services				
	Agree strongly	38.1	20.1	29.0
	Agree somewhat	53.6	74.9	64.4
	Disagree somewhat	6.7	4.5	5.6
	Disagree strongly	1.5	0.5	1.0

Awareness of quality labels

There was a high level of awareness among Irish consumers of quality labels, with 87% indicating that they were aware of at least one such label. Among those mentioned were: Guaranteed Irish (26%), Q Mark (25%), ISO9000 (11%) and the Wool Mark (8%). Interestingly, 14% of consumers quoted a recognised brand name as an example of a quality label, but less than one percent gave the Organic symbol as an example.

The importance of region of origin

Region of origin was an important consideration when deciding to buy quality products for almost two-thirds of respondents. Region was generally taken to mean a country (only one-quarter considered region to mean a province or region within a country), usually Ireland (44%). A similar number (two-thirds) claimed that they would be encouraged to buy a product which refers to the region of origin on the packaging. The main motivation for this was support and loyalty for the particular region (Table 5.4). In the discussion of region of origin, consumers displayed a strong loyalty to Irish products, particularly beef and dairy products.

Table 5.4 Reasons why region of origin encourages purchase

Reason	%
Support Irish products	20
Trace back to producer	15
Ensure Irish jobs	15
Region is associated with quality	14
Loyalty to local producers	10
Keep money in local area	4
Consumers see no difference between countries	17
Other	6

Rural SMEs and quality

Four out of five consumers believed products and services from rural areas to be of high quality. Respondents who agreed that rural businesses generally produce high quality output were asked to explain the basis of this perception. One out of five of these consumers considered small rural businesses to be operating in a competitive environment where business survival is based on their ability to compete on quality. A further 20% perceived that small-scale production methods ensured that small rural businesses achieved high quality. The skills of the individual producers were considered to be linked to product quality by more than one in four respondents. Small rural producers were deemed to "have pride in their work" and be "quality focused".

Consumers who were equivocal about the quality products of small rural producers criticised the presentation and packaging of products. For some consumers these products were indistinguishable from conventional products. The hygiene practices of some producers were considered to be questionable where they were thought not to have the necessary resources to implement a quality/hygiene plan.

5.4 Consumer Perceptions and Practices in Relation to Regional Quality Products

Consumer buying-behaviour in relation to regional quality products

Almost three out of four consumers claimed to buy regional quality products and they were asked to provide examples of such products purchased. More than six out of ten examples included a food product; a further three out of ten included a crafts product, whilst the remaining examples included a tourism product. Respondents readily gave examples of local and extra-regional products. However, they generally identified products in terms of a specific producer or product brand name rather than by the product's association with a region. This suggests that products may be bought because of their association with a producer rather than with a region.

The recent commercial success of farmhouse cheese was reflected in it being the most frequently quoted regional food product purchased (Table 5.5). Respondents generally identified farmhouse cheeses by their brand name rather than by their region. However, many farmhouse cheese producers brand their products using local place names. Traditional products, namely preserves and honey, were purchased by more than one in ten consumers. These traditional products were usually identified by their generic name of 'home-made', reflecting the lack of branding by producers.

Irish crafts, no longer aimed exclusively at the tourist market, are now part of the purchasing repertoire of Irish consumers. Pottery was particularly favoured by consumers, with most consumers including the name of a potter in their responses.

Table 5.5 Types of regional quality products purchased

Types of regional quality products	%
Farmhouse cheese	21.5
Honey/preserves/condiments	11.3
Deli meats and salads	6.9
Dairy products	5.1
Bakery products	3.8
Organic produce	3.5
Other speciality foods	11.6
Pottery	17.8
Woollens/textiles	3.8
Other crafts products	10.0
Rural tourism and services	4.7

Not surprisingly, food products tended to be purchased more regularly than either crafts or tourism products (Table 5.6). The absence of preservatives in processing many speciality foods, with the resulting short shelf-life, and smaller portion sizes, may account for the higher frequency of purchasing. Festive and special occasions were important influences on crafts purchasing behaviour. Consumers associated crafts with gift giving, particularly wedding gifts. A small number of users bought speciality candles more than once a week.

Table 5.6 Frequency of purchase of quality food and crafts products

Place of purchase (%)	Food (n=341)	Crafts (n=171)
Directly from the producer	13	40
Small shops within the study region	8	9
Small shops in the urban area	3	8
Supermarket	38	2
Market place, fair	39	41

Place of purchase of quality products

While a distinction was made by consumers between purchases 'direct from the producer' and 'market place and fairs' (Table 5.7), it is generally acknowledged that these purchases should be considered to be direct from the producer. Interestingly, supermarkets accounted for 38% of sales of quality food products. Many consumers' definition of supermarkets included not only the larger multiples outlets but also outlets belonging to retail groups which could be considered small shops in a wider European context.

The sale of crafts directly from the producer to the consumer reflects the structure of the crafts sector in Ireland where many craft workers have retail outlets attached to their production area. Buying directly from the producer may allow the consumer to see the product being made and also may give the consumer an opportunity to buy slightly flawed products at a cheaper price. The popularity of crafts fairs in Ireland, particularly during the Christmas period, is an indicator of the seasonality of the crafts sector.

Table 5.7 Place of purchase of quality food and crafts products

Frequency of purchase (%)	Food (n=340)	Crafts (n=166)
More than once a week	13	0.6
Once a week	36	3
Less than once a week	9	0.6
Less than once a month	28	3
Occasionally	14	93

Sourcing problems

Less than 25% of consumers reported difficulty in sourcing regional quality products. Continuity of supply and the limited number of outlets where products were available were the main areas of complaint by consumers. Most complaints on sourcing products tended to focus on food rather than crafts or tourism products. While most consumers stated that they "know where to find products", there was a general consensus that having quality regional food products available in the local supermarket "would be very convenient". Consumers complained that "some products disappear for a period of time and then reappear on the shelves".

Quality rural tourism services

Forty-four per cent of consumers had purchased some type of quality rural tourism product. Accommodation was the most frequently mentioned product (Table 5.8). Interestingly, farmhouse accommodation, an obvious rural tourism product, was mentioned by just 16% of respondents.

Table 5.8 Types of tourism services purchased

Frequency of purchase (%)	Food (n=340)	Crafts (n=166)
More than once a week	13	0.6
Once a week	36	3
Less than once a week	9	0.6
Less than once a month	28	3
Occasionally	14	93

Information channels used by consumers

Personal recommendations from friends and family members and recommendations from retailers were considered the most reliable sources of information on quality products for consumers (Table 5.9). When referring to advertising as a source of information, respondents generally mentioned advertising sponsored by the state tourism and food promotion agencies. The relative lack of references to company and brand specific product advertising suggests that consumers viewed state agencies as more reliable sources of information than advertising from the private sector

Table 5.9 Sources of information about quality products

Sources of information	%	Source considered most reliable %
Personal contacts	32	38
Retailer	31	33
Advertising	17	13
Publicity in the media	10	9
Fairs, exhibitions	4	4
State promotional agencies	3	2
Travel	2	1
Other	1	0

Resistance to the purchase of regional quality products

One in five consumers (rejectors) claimed that they did not buy quality regional products. A further 10% (non-rejectors) occasionally made such purchases. Reasons for not buying these products (Table 5.10) were cross-tabulated with age, gender, socio-economic status and study-region.

Table 5.10 Reasons for not purchasing regional quality products (n=124)

Reason	%
Not interested/not important	38
High price	25
Family size	14
Supermarket products meet needs	13
Children don't like them	2
Limited distribution of products/ No time to seek out these products	7

Indifference to regional quality products was given as the main reason why more than one out of three consumers did not buy. Consumers described these products as "they are just not important to me". While there were no regional differences in the proportion of consumers who did not purchase quality products, the reasons why differed. In the Northwest respondents expressed lack of interest as their main reason for non-purchase, followed by high price. In the Southwest the reasons were slightly more diverse, including a lack of interest, high price and family size. Interestingly, family size was given as a reason for not purchasing, by both single and larger family units. Single household units complained that many products were not available in single portion sizes, while larger family units complained that products were not available in family-packs. The over-45 year age groups were least interested in quality products. Not surprisingly the under-25 year olds were concerned with price. However, this group were less likely to put forward "lack of interest" as a reason for not buying.

Reasons why consumers do not value quality products requires further research. Possible explanations are: the core values of these products may not have been clearly communicated to consumers; rejectors may have different values and lifestyles to adopters of quality products; or some who were interested may not have wished to state 'high price' as a reason for not purchasing.

5.5 Consumer Perceptions of Regional Imagery in Relation to Quality Products

Imagery associated with the study regions

In a series of open-ended questions, respondents were asked to state the images they associated with the two study regions. The data were cross-tabulated with age, socio-economic status, gender, education and resident type. Respondents generally agreed that the respective regions have positive images attached to them (Table 5.11).

Table 5.11 Imagery associated with the study regions (%)

Imagery associated with study region	Northwest	Southwest
Scenery	22.6	25.4
Tourism	8.7	13.9
Friendly people	3.7	14.5
Good food	2.9	9.3
Rural/agriculture	21.8	8.0
Culture and historical past	8.2	10.6
Environment	8.2	8.8
Outdoor pursuits (golfing, boating, walking)	7.6	3.9
Negative image	3.9	2.2
No image	8.7	0.8
Other	3.7	2.7

The Northwest was strongly associated with scenery (mountains, coastline and waterways) and its rural and agricultural image. The scenic associations were strongest amongst residents in the study area, whilst residents outside the region (Dublin and Galway) viewed the area as agricultural and rural. The agricultural image was strongest among employed professionals and among both single households and families with children. The rural association was also strongest among the 35-44 year age group. Household units with either married or cohabiting couples were more likely to associate the region with scenery.

While data were collected from the three counties in the Northwest region, the sample size does not justify making statistical inferences. However, the qualitative nature of the questionnaire does give insights into the views of the residents in the region. Some consumers viewed Sligo as "not a (tourism) destination in itself" but "on the route to the Northwest or the West". Negative attitudes towards the region were highest among Roscommon residents. They felt "forgotten by national government".

Respondents living in villages expressed a sense of isolation compared to respondents living in towns on major route ways, “we are disadvantaged because we do not live on the major routes to Dublin and Galway”. Some expressed the view that “there is no reason to visit Roscommon”. While the residents of Leitrim perceived the county to be underdeveloped, they viewed their county in a more positive light than residents from Roscommon. Leitrim was strongly associated with the river Shannon and the tourism potential it represents.

Consumers from both within and outside (Cork City and Dublin) the Southwest described the area as scenic, and residents were characterised as being friendly. Despite the fact that the region has a strong rural base, only 8% of respondents associated the Southwest with agriculture compared with almost 22% in relation to the Northwest. Not surprisingly, the reliance on the tourism sector in the area was reflected in the number of consumers who associated the region with tourism. However, further development of tourism was seen by some residents as potentially detrimental to the region, with some consumers forecasting that “the place will become too touristy”. The over - 55 age group was particularly concerned about the development of tourism and feared that “it will threaten local community spirit”. It was acknowledged that the development of tourism would bring economic prosperity to the region. Traffic congestion in the main urban areas during the summer months was considered to be a particular problem. Other negative features mentioned included litter and increased prices during the peak tourist season.

Consumer perceptions of quality products from the study regions

Consumers were asked if they were aware of quality products from the respective study regions and to recall examples of these products. There was generally a high level of awareness: 87% in the Southwest, 67% in the Northwest. Not surprisingly, consumers living in the study region were generally twice as likely to be aware of local products as those residing outside the area.

Consumers associated both regions with quality crafts products. Interestingly, 35% of consumers living in the Northwest recalled a speciality food from the region whilst only 15% of consumers living outside the region (Dublin and Galway) could do so. The importance of the farmhouse cheese sector in the Southwest was reflected in consumers’ ability to recall the product.

Level of awareness of selected quality products

Respondents were presented with a list of selected products from which they were asked to indicate their awareness. As expected, respondents from each region had a higher level of awareness of products originating within their own area than from the other study region (Table 5.12).

Table 5.12 Level of awareness of selected quality products and services (%)

Regional Quality Products	Northwest	Southwest
Handmade crafts products from Kerry/West Cork	50.3	80.6
Handmade crafts products from Sligo, Leitrim, Roscommon	49.0	10.9
Country/Farmhouse accommodation in Sligo, Leitrim, Roscommon	55.2	23.9
Manor house accommodation in Kerry/West Cork	27.8	45.8
Angling in Sligo, Leitrim, Roscommon	70.6	38.3
Golfing in Kerry/West Cork	64.4	78.1
Speciality cheeses from Kerry/West Cork	58.2	71.1
Speciality cheeses from Sligo, Leitrim, Roscommon	18.6	8.4
Organic produce from Sligo, Leitrim, Roscommon	46.4	9.0
Organic lamb/beef from Sligo, Leitrim, Roscommon	24.2	8.5
Speciality meat/deli products from Kerry/West Cork	29.4	58.7
Speciality confectionery/preserves from Kerry/West Cork	21.1	45.8
Speciality confectionery/preserves from Sligo, Leitrim, Roscommon	34.5	8.0

Consumer perceptions of regional/territorial labels

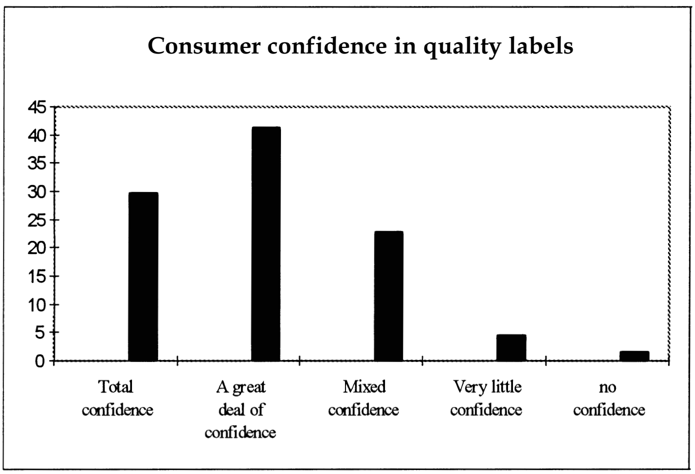
Territorial designation is not a well developed concept in Ireland. At the time of the research no products in Ireland were registered under the EU territorial designations systems (Protected Designation of Origin (PDO), Protected Geographical Indication (PGI) or Traditional Speciality Guaranteed. Less than one out of three consumers was aware that the EU is trying to promote the development of regional designations to distinguish quality products/services.

Consumers were asked to indicate their awareness of the quality labels listed in Table 5.13. The labels representing the independent regulatory agencies, Bord Fáilte, The National Standards Authority of Ireland and Excellence Ireland were most familiar to consumers. The quality labels associated with the self-regulatory crafts and tourism groups had lower recognition among consumers, but it should be noted that these groups generally spend comparatively less on promoting the awareness of their labels than the independent agencies.

Table 5.13 Level of awareness of selected quality labels (%)

Quality Label	Northwest	Southwest
Irish Tourist Board Quality Approval	85	84
Irish Country Holidays	57	57
ISO 9000	50	50
Excellence Ireland quality mark (Q mark)	50	44
Hidden Ireland	34	38
Golfing Union of Ireland golf course ranking	30	39
Manor House Hotels of Ireland	38	45
Crafts Council of Ireland registration	27	35
Friendly Homes of Ireland	29	33
Irish Boat Rental Association	24	22
Association for Adventure Sports Approval	18	21
Crafts Council of Ireland Special Award	17	25
Ireland's Blue Book	14	15
Royal Dublin Society Open Farm Approval	11	14

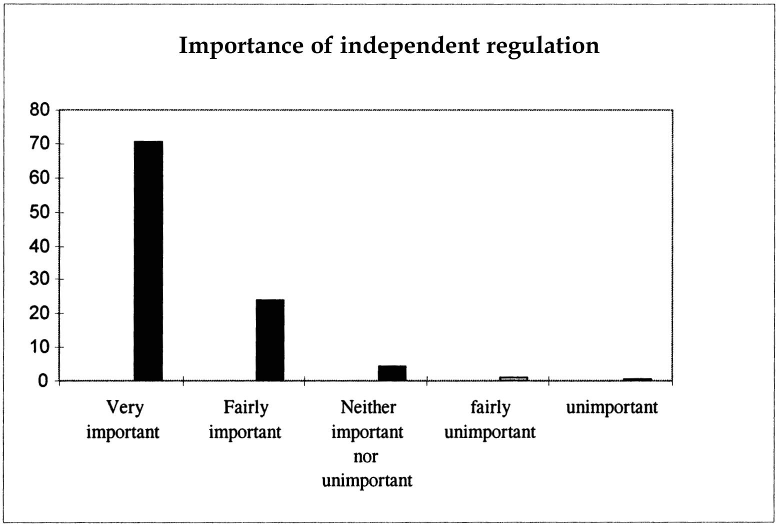
Figure 5.1 Consumer confidence in quality labels (%)



Consumer confidence in quality labels

There was a high level of confidence in quality labels generally, with more than seven out of ten consumers stating they were either totally confident in, or had a great deal of confidence in, such labels (Figure 5.1). More than nine of ten consumers placed a high level of importance on the need to have an independent regulatory agency to regulate quality (Figure 5.2). Consumers' awareness of the independent regulatory agencies, notably the Irish Tourist Board quality approval, ISO9000 and Excellence Ireland quality mark, and their subsequent confidence in these labels, suggest that these agencies could provide a model for a small business regulatory quality group.

Figure 5.2 Importance of independent regulation (%)



5.6 Summary

Three hundred and ninety-seven personal interviews were conducted in the Northwest, the Southwest and in the cities of Galway, Cork and Dublin. The survey sample was biased towards middle and upper socio-economic groups as earlier research indicated that these groups were among the highest consumers of quality products.

Consumers used both objective and subjective attributes to define the characteristics of quality: intrinsic properties of the product, freshness, taste/flavour, consistent quality and good presentation, were the most important indicators of quality. Perceptions appeared to be influenced by age rather than gender and social class. Consumers had an expectation that quality products are more expensive than mainstream products and were willing to pay a premium for quality products. There was a high level of awareness of quality labels, with 87% of consumers indicating that they were aware of at least one label. This level of awareness was supported by the high level of trust consumers have in such labels.

Region of origin was an important consideration for two out of three consumers when deciding to buy quality products. Consumers generally viewed Ireland as a single region. There was considerable consumer loyalty to Irish products, particularly beef and milk. Consumers tended to be positively disposed towards small-scale rural producers, with many linking scale of enterprise with quality. The poor presentation and packaging of rural products and poor hygiene practices were criticised by some consumers.

The penetration of regional quality products was generally high, with three out of four consumers claiming to buy these products. This research suggests that the profile of a typical consumer of quality regional products is female, aged 35-44 years, married with children, from an employed professional household and resident in the study region. Food products were purchased by almost half of all consumers at least once a week, whilst crafts products were purchased occasionally. Consumers generally bought products directly from the producer, either at the place of production or at markets and fairs. Interestingly, 38% of consumers purchased speciality foods from supermarkets. Consumers experienced poor continuity of supply with some food products.

Consumers generally associated positive images with both study regions and crafts and food were the main quality products associated with the regions. Not surprisingly, regional residents displayed a higher level of awareness of products from their specific regions than consumers living outside the study regions. Consumers generally associated products with the producer or craftsperson rather than with a specific region. This suggests that producers have not yet exploited the positive imagery associated with the regions and consumers' perceptions of quality associated with products from these regions. Therefore the potential for using positive local imagery to reinforce the quality perceptions of rural products needs to be recognised by producers. Such recognition needs to be fostered by the support agencies. However, whilst region of origin is important, it contributes to growth only when the products coming from the regions are of intrinsically superior quality.

Chapter 6: Evaluation and Recommendations

6.1 Introduction

This chapter brings together the results of the three components of the research. It evaluates: (i) the role of constructions of quality and regional imagery as marketing strategies; (ii) the regional factors that contribute to innovation by SMEs in the production of QPS; and (iii) the types of networks necessary for successful marketing strategies. Finally, recommendations are made with respect to the promotion of quality, the promotion and marketing of QPS, and the use of regional imagery in the latter context.

6.2 Use of Constructions of Quality and Regional Imagery as Marketing Strategies

Constructions of quality

It was recognised that the role of regional imagery is likely to be less in a small country, such as Ireland, with a limited domestic market and lacking clearly defined and perceived regions, as compared with, say, France. Nevertheless, study of the use of regional imagery in the Irish context is clearly merited because of its growing importance as a stratagem in promotion and marketing internationally. The research identified that a disparity existed, to a certain extent, between producer and institutional perceptions of what constitutes quality, whilst consumer and producer views were more closely aligned. Many producers viewed unofficial certification associated with quality producer and marketing groups, citations in recognised guidebooks and reputation, as being more important than official certification. The organisations, by contrast, defined quality in the broader terms of meeting regulatory requirements. Many producers viewed these statutory requirements as a minimum threshold that should be exceeded. This was more closely aligned to the view of consumers that 'attraction' was the most significant indicator of quality, with customer care and service being considered to be part of this intangible but important quality characteristic. However, organisations also recognised the importance of meeting consumer/customer requirements indicating, perhaps, the need for certain organisations to carry out market research into what exactly these requirements are.

Both producers and consumers identified traceability to producer and region as important; producers were clearly conscious of this consumer expectation. Producers and organisations concurred in highlighting methods of production as being of considerable importance; a lack of awareness was present among consumers in this regard, pointing to a need for consciousness-raising. Producers diverged widely from consumers and organisations in assigning low importance to presentation, thereby pointing to a need for further support of methods of presentation by organisations.

Constructing regional imagery

A broad alignment was apparent in the images of the regions held by the three groups interviewed and particularly between the producers and the organisations. Tourism producers made effective use of regional imagery in promotion and marketing. Food producers tended to use local place names in labelling their products, whilst food and crafts organisations were more likely to use national images. Individual crafts' producers invoked imagery as features of their products, rather than using imagery in promotion *per se*. The influence of regional imagery on consumer purchases appears to be secondary to aspects of quality. In that respect the consumers were more closely aligned with the producers. There was a perception of Ireland as a region of production of QPS. Little awareness of regional quality-linked branding initiatives in the two study regions was captured in the survey of consumers but this may be related to the newness of the initiatives.

Linking quality to region of origin

For a majority of the producers surveyed, the quality of their products and services derived primarily from the materials used and from their own skills, interest in and dedication to their business. Links between quality and region of production were less emphasised but, nevertheless, such links were made. An exception was organic produce, where the relevant organisations said that the **method** of production was of paramount importance.

Most products marketed overseas by national organisations were marketed as quality **Irish** products rather than with reference to their sub-regional designation. Promotional materials invoked a range of quality-linked associations with place: with the quality of water, air and grass-based livestock production (for fish and food products); with craftsmanship and tradition (in the case of crafts); and with aspects of the physical, cultural and social environment (landscape, history, heritage and friendly people) in the case of tourism products.

The Regional Tourism Authorities, the rural tourism co-operative organisations and PMGs differed from the national organisations in invoking associations with sub-regions of production in their overseas, as well as home marketing. Certain recreational activities acquired their niche quality status from actual locations (links golf courses, game and freshwater angling, hill walking and climbing, water sports). The promotional materials used to advertise and market quality accommodation frequently linked the quality of the experience with specific locales, by invoking associations with particular landscape or historical features. The Fuchsia Brands Company deliberately used regional imagery to establish a quality brand initiative for both tourism and food products in West Cork.

In food and organic production it may not be in the interests of producers to differentiate further between products. Because of their relatively low numbers, their main challenge is to establish markets in competition with conventional producers, rather than competing among themselves.

Ireland was identified as the main region of production by the consumers but awareness of regional and local products and services was present, particularly for foods, crafts and tourism products. While consumers had a high level of awareness of the products and services associated with the study regions, these were generally identified by brand name or by producer. Crafts and food were the main quality products associated with the regions. Not surprisingly, residents displayed a higher level of awareness of such products than extra-regional consumers.

Consumers generally associated products with the producer or craftsperson rather than with a specific region. This suggests that the positive imagery connected with both study regions, and the consumer perception of quality associated with products and services from these regions, had not yet been exploited by the producers. Therefore, the potential for using positive regional imagery to reinforce the quality perceptions of rural products needs to be recognised by producers. Such recognition needs to be fostered by the support agencies. However, whilst region of origin is important, it contributes to growth only when the products coming from the regions are of intrinsically superior quality.

6.3 Regional Environment, Innovation and the Production of QPS

In the Northwest, private inward investment was viewed as contributing to the development of organic food production and crafts. Sources were primarily immigrants who have been attracted by the quality of life, and returning emigrants. The quality of the products has been enhanced, as has the region as a product source. In the Southwest, similar inward investment was mentioned in the context of crafts. Inward private investment from external sources in large hotels and other attractions was viewed as important also for tourism, as smaller businesses tend to benefit from these. It was not seen as important by the food organisations in this region. However, national food and fish organisations identified inward investment as a positive feature.

The main factors reported as contributing to innovation in the Northwest included education and training, competition, international trends, the 'tiger' economy, market demand, availability of funding, the presence of Sligo Institute of Technology and networking among entrepreneurs. The food sector was mentioned as being particularly innovative because the producers were aware of market trends and their products were market driven. In the Southwest, innovation was linked to increased competition, the skills and expertise of management, market demand, a growing appreciation of local products and the existence of a culture of innovation. Again, the food sector was highlighted as being particularly innovative, partly due to the education and advisory services of the Institutes of Technology, Teagasc and University College Cork. National fish, food and organic production organisations referred to changing market demand, market knowledge, and EU supports and policy as being factors contributing to innovation in both regions.

The factors perceived as inhibiting innovation in the Northwest included, primarily, the absence of a tradition of entrepreneurship. Other factors mentioned were a high perception of risk, a lack of education, skills and knowledge of the market place, the absence of a large market, a shortage of finance, and the fact that the more educated people leave the area. In the Southwest, the buoyancy of the regional tourism industry was viewed as depressing innovation; businesses saw no need to innovate. In relation to food, scepticism, the lack of status of small-scale production, and a fear of failure were factors identified. Other general factors included a lack of education, training and resources, both in terms of finance and time, and a lack of profitability to invest in innovation.

In both regions, lack of innovation in the crafts sector was attributed to the demands of manufacturing and meeting current order levels, which allowed little if any time for developing new products. In the tourism sector generally, restrictive building regulations and a lack of funding for market research were mentioned. Distribution costs, a lack of technical support, education, knowledge, market research and capital, and 'fear' were factors identified by national fish, food and organic production organisations.

6.4 Frameworks Necessary for Successful Marketing Strategies

Marketing assumes particular importance in the context of Irish goods and services because of the export orientation of the economy and the desirability of promoting the consciousness of Ireland in overseas markets. Most organisations responded positively to the concept of the EC implementing special measures to assist local producer groups. Most felt that producer networking should be an important part of the marketing strategy of SMEs, but that its establishment required support. It was also felt that such measures would allow for the development of a quality regional brand image, would improve traceability, could provide additional funding for SMEs, and would allow for dissemination of information.

The crafts organisations viewed PMGs as potentially useful in getting group rates for transportation, and referred to the success of such groups for other products. However, organisational difficulties were foreseen because of the individuality of crafts products and crafts producers. Nevertheless, the Crafts Council was facilitating the development of crafts cluster groups for marketing. Bord Iascaigh Mhara felt that, whilst PMGs could potentially help alleviate distribution problems, the existing groups were more concerned with technical problems. The West Business Innovation Centre and Cáis expressed doubts that such groups could work in that sector, because of the diversity of the products. By contrast, Real Foods of Ireland and The National Food Centre viewed marketing groups as a way of improving the marketing chain, given proper financing. All of the organic production organisations favoured such groups as a means of increasing volume, decreasing costs, regulating quality and sharing production and storage facilities. PMGs were seen as vitally important by most tourism organisations. Multi-sectoral organisations in both regions saw groups as an important way of improving the marketing chain for QPS.

In addition to the difficulties associated by organisations with the individuality of crafts producers, producers and organisations identified barriers to the development of PMGs. These included a lack of finance, experience and personnel willing to dedicate their time to the establishment and maintenance of these groups. For food producers, marketing strategies must take account of structural changes in food retailing and distribution. There are two broad options: to supply localised and limited markets or to access the large-scale multiple outlets.

For those not wishing to engage with the multiples and larger retail chains, opportunities exist for increasing direct sales. Growing consumer demand for product traceability is likely to lead to an increase in the number of local outlets selling locally produced foods. Growth in the numbers of speciality shops (e.g. delicatessen foods) also provides opportunities for low volume production. The Irish home market, however, is ultimately limited, but electronic commerce has the potential to access markets without producers becoming implicated in the conventional retailing environment.

For those engaging the mainstream food chains, the changes taking place are likely to oblige producers to establish forms of collective organisation to increase their market power. Food producers in the Northwest, for instance, were conscious of the need to organise for marketing, e.g. to overcome delivery and transport costs. Group organisation was also seen as a means of lobbying for policy purposes. However, there was some hesitancy on the part of the statutory agencies to become involved in the mechanics of group organisation; they considered that this was a function that properly should rest with producers themselves. Most of the producers were involved in group promotion and marketing through PMGs.

6.5 Recommendations: Quality, Promotion and Marketing, Regional Imagery

The promotion of quality

'Quality' was highly prized as a feature of products and services by the producers, consumers and organisations interviewed. Differences between the three groups were apparent in the importance attributed to varying quality indicators. Several issues were identified in the context of quality promotion, where organisations potentially have a role to play.

- Funding and advice over and above that available already are necessary to help producers offset some of the costs associated with installing hygiene systems in the speciality food sector.
- Producers referred to the need for the establishment and effective monitoring of strict quality criteria in association with regional branding. Branding *per se* is not considered adequate if a reputation is to be established for a region with which quality producers will wish to be associated. A regional or sub-regional brand that is perceived as not having quality connotations may have negative implications for niche producers.
- There is a need also to recognise subjective dimensions of quality in food and to acknowledge a role for producer groups in monitoring such dimensions as a method of retaining individuality and exclusivity. One way of doing this, which was suggested by quality producers, is to have representation on state boards and appropriate committees from regional to EU level so that their views and values, which differ from those of the commercial food sector, may be represented.
- There is a need to generate greater public awareness about food quality and quality products, and to ensure closer compatibility between the views of producers, consumers and support agencies in regard to the factors that define quality products.
- There is a need for stricter control of activities that are potentially damaging to the quality of the natural and built environments in locations which have established or are establishing a quality image for their products and services. Issues involved include protection of natural and cultural heritage, control of new building and construction, and control of effluent from industry and agriculture. Wider promotion of the Beatha ECO-label introduced on a pilot basis under the EU LIFE programme provides a possible approach in this regard (Ó Cinnéide 1999).
- There is a need for stricter regulation of tour operators in the tourism sector, particularly in the context of coarse angling, to ensure the maintenance of a high standard in the product.
- There is a need for stricter control of the number of group tours being introduced to popular touring locations. Such groups make relatively limited contributions to local economies and much of the profits accrue to tour operators and hotel owners, often located outside the regions.

Promotion and marketing of QPS

In the context of the promotion and marketing of QPS, several key issues emerged.

- There was a clearly expressed need among producers for additional training in promotion and marketing relating to QPS. Many producers lacked formal training and this was perceived as inhibiting the effective development of potential markets.
- There was an associated need to provide additional funding to permit producers employ professional marketing staff, possibly for group marketing. Many small-scale producers reported that the day-to-day demands of their businesses, in which they were closely involved in a range of tasks, was such as to reduce the time available for promotion and marketing. These features applied to the food and crafts sectors in particular.
- In the crafts sector, assistance is necessary to enable interested small-scale producers to become more commercially oriented in their production systems. The viability of some enterprises was constrained by reluctance to increase output because of concerns relating to a loss of personal input to the production process and the perceived loss of uniqueness that might result. Some such businesses made low profits and had difficulty in developing markets because of their low output.
- Equally, organisations need to give further recognition to the special features of handcraft production (uniqueness, limited output) in the promotional and marketing assistance provided. Programmes which emphasise large-scale export markets are not appropriate for small-scale producers.
- A need was identified by producers, and was recognised at an institutional level, for further support to be provided to small-scale food producers to assist them in distributing their products more effectively to overseas markets and to large multiples. A pilot project that would address the problems posed by centralised purchasing by large multiples was suggested by one organisation.
- The tourism sector provided many examples of good practice in use of the Internet for promotion and marketing in both study regions. The opportunities afforded by this medium were not being used to any significant extent by food and crafts producers. Organisational support is merited, possibly following the model introduced in the rural tourism sector some years ago where funding was provided for a pilot project

that advertised accommodation properties on the Internet.

- Group promotion and marketing is well established in tourism and on a localised basis in the organic production sector. Food and crafts producers expressed some reluctance in this regard because of the uniqueness of their products and a desire to maintain control of presentation and sales. Nevertheless, there was considerable support for organisation-assisted group marketing among food and crafts producers and among fish processors as a method of increasing influence in the hierarchy of market relations. Experience from the tourism sector illustrates that dedicated on-going financial support for at least three years is necessary for the establishment of successful group marketing.
- Improvements in road, rail and air infrastructure are required in the Northwest to facilitate tourist access to the region.
- A deficit was identified in hotel accommodation in counties Leitrim and Roscommon in the Northwest, which was viewed as restricting conference-related and higher-spending tourist activity in these counties.
- Interviewed consumers attributed more importance to the presentation of products (particularly food products) than did producers. Organisations have a role to play in increasing producer awareness in this regard and in assisting them to improve standards of product labelling, presentation and promotion.
- The successful development and marketing of quality products and services in rural areas is highly dependent on entrepreneurship. Entrepreneurship is reflected in a set of personal characteristics that include innovativeness, commitment, willingness to take risks, production and marketing skills, ability to provide capital, and adaptability to changing situations. If niche markets are to be developed, the efforts of individual producers need to be supported in a manner sensitive to their specific needs and products.

Regional imagery

Regional imagery was used to some extent in the promotion and marketing of many of the surveyed QPS. Imagery from both regions was used as a national marker for international promotion and marketing by the national food, fish, crafts and tourism organisations. Both tourism producers and organisations used regional and sub-regional imagery in promotion and marketing, nationally and internationally. Most food, fish and organic food producers and organisation were aware of PDO and PGI labels, and were positively disposed towards the use of such labels in group marketing. However, most producers stressed the established international recognition enjoyed by Irish food and fish produce, crafts and tourism services. Organisations have a role to play in developing regional imagery as a strategy for promotion and marketing further in a number of ways. These include:

- seeking to capture benefits at regional and sub-regional levels from the established national imagery by linking the former to the latter, through use of similar themes and through joint promotional campaigns, whilst at the same time protecting the uniqueness of the regional and local imagery;
- ensuring the validity of the image for the products, services and areas promoted by establishing relationships with quality characteristics and by safeguarding broader aspects of environmental quality;
- seeking to ensure that duplication of imagery and competition is minimised at regional and sub-regional levels. Limited resources need to be used in orchestrated and targeted ways to establish market recognition of strong regional and sub-regional images. Sensitivity is necessary in this regard, however, to capture the interest in and enthusiasm for regional branding that is currently emerging at regional and sub-regional levels and to mould it into a coherent strategy.

The research illustrates that the use of regional imagery in promotion and marketing has potential to be exploited further in Ireland. This exploitation will require considerable inputs of expertise, time and investment. It may also be more appropriate for particular products and markets than for others.

Appendix A

Table A.1 Population composition and change 1971-1996

Region and county	**Population**	**% change**			**Area ha**	**Persons/ sq km**	**Persons/ sq km**
	1996	1991-96	1981-91	1971-81		1996	1991
Northwest	**132853**	**0.7**	**-4.1**	**4.1**	**578360**	**23**	**23**
Leitrim	25057	-1.0	-8.4	-2.6	152476	16	17
Roscommon	51975	0.2	-4.9	1.9	246276	21	21
Sligo	55821	1.9	-1.3	10.3	179608	31	30
Southwest	**546640**	**2.7**	**1.3**	**12.8**	**1216130**	**44**	**45**
Cork	420510	2.5	2.0	14.1	745988	55	56
Cork CB	*127187*	*-0.1*	*-6.7*	*6.0*	*3731*	*3411*	*3409*
Cork Co. (excl. CB)	*293323*	*3.6*	*6.4*	*18.7*	*742257*	*38*	*39*
Kerry	126130	3.5	-0.7	8.9	470142	26	27
STATE	**3626087**	**2.8**	**2.4**	**15.6**	**6889456**	**51**	**52**

Source: CSO (1972) *Census of Population 1971, Vol. 1*; CSO (1982) *Census of Population 1981, Vol. 1*; CSO (1993a) *Census 91, Vol. 1*; CSO (1997a) *Census 96, Vol. 1*

Table A.2 Dependency ratios* of the population 1996, 1991, 1981, 1971

Region and county	**Year**			
	1996	1991	1981	1971
Northwest	**64.8**	**76.3**	**76.3**	**77.4**
Leitrim	68.6	79.8	77.7	78
Roscommon	66.9	76.3	78.2	78
Sligo	58.8	68.7	73.8	75.6
Southwest	**57.0**	**62.6**	**71**	**72.6**
Cork	53.5	60.8	69.8	72.7
Cork CB	*46.9*	*51.7*	*62.3*	*72.3*
Cork Co. (excl. CB)	*56.6*	*65.3*	*73.9*	*72.9*
Kerry	60.5	68.9	72.5	72.5
STATE	**54.1**	**61.6**	**69.6**	**73.4**

* The dependency ratio is calculated by expressing the sum of the populations aged 0-14 and 65 years and over as a percentage of the population 15-64
Source: CSO (1973) *Census of Population 1971, Vol. 2*; CSO (1984) *Census of Population 1981, Vol. 2*
2; CSO (1994a) *Census 91, Vol. 2*; CSO (1997b) *Census 96, Vol. 2*

Table A.3 Age at which full-time education ceased 1971, 1981, 1991 (%); % with third level education in 1996

Northwest Region

Year	Age Group	**Northwest**		Leitrim		Roscommon		Sligo	
		M	**F**	M	F	M	F	M	F
1991	<15	**33.9**	**24.2**	39.3	29.9	35.3	24.3	29.8	21.6
	15-18	**49.1**	**56.1**	46.9	54.1	51.0	60.5	48.4	53.1
	19-21	**5.5**	**8.6**	4.4	7.7	5.4	7.8	6.2	9.7
	22+	**3.9**	**3.2**	2.9	2.4	3.5	2.9	4.9	3.9
1981	<15	**44.0**	**32.3**	49.2	39.5	45.2	32.1	39.8	29.1
	15-18	**43.8**	**53.5**	40.3	48.0	44.5	55.7	45.1	54.1
	19-21	**4.0**	**6.3**	3.1	5.3	3.6	5.8	4.9	7.2
	22+	**3.1**	**2.2**	2.3	1.5	2.6	1.7	4.0	2.9
1971	<15	**60.4**	**45.1**	67.5	55.3	59.6	42.5	56.9	42.2
	15-18	**30.8**	**43.2**	25.1	35.0	31.8	46.2	33.3	44.6
	19-21	**2.2**	**4.2**	1.7	3.6	2.1	4.0	2.5	4.7
	22+	**2.2**	**1.5**	2.1	1.1	1.9	1.2	2.5	2.0
1996	*Third Level*	**12.2**	**15.0**	10.5	13.4	11.3	13.6	14.8	18.1

Southwest Region

Year	Age Group	**Southwest**		Cork		*Cork CB*		*Cork Co (excl. CB)*		Kerry	
		M	**F**	M	F	*M*	*F*	*M*	*F*	M	F
1991	<15	**26.6**	**22.3**	25.2	21.6	*22.7*	*22.2*	*26.2*	*21.3*	31.3	24.7
	15-18	**54.1**	**58.7**	54.9	59.4	*56.8*	*44.4*	*54.1*	*67.0*	51.5	56.2
	19-21	**7.4**	**8.8**	7.7	8.8	*7.6*	*7.5*	*7.8*	*9.4*	6.3	9.1
	22+	**5.5**	**3.7**	5.9	3.9	*6.9*	*4.3*	*5.5*	*3.7*	4.2	3.1
1981	<15	**35.6**	**30.3**	34.3	29.9	*28.4*	*28.9*	*37.0*	*30.4*	39.6	31.9
	15-18	**50.2**	**56.1**	51.3	56.9	*55.7*	*58.2*	*49.3*	*56.1*	46.9	53.3
	19-21	**5.9**	**6.8**	6.2	6.8	*6.7*	*6.2*	*6.0*	*7.1*	4.7	6.6
	22+	**4.4**	**2.6**	4.8	2.7	*5.2*	*2.9*	*4.6*	*2.6*	3.4	2.1
1971	<15	**49.9**	**40.7**	47.6	39.4	*36.3*	*34.4*	*53.1*	*42.5*	56.6	44.7
	15-18	**38.7**	**46.6**	40.1	47.1	*47.8*	*50.5*	*36.3*	*45.1*	34.9	45.0
	19-21	**3.6**	**4.3**	3.8	4.3	*4.9*	*4.4*	*3.2*	*4.3*	3.0	4.3
	22+	**2.9**	**1.6**	3.1	1.6	*4.0*	*1.8*	*2.6*	*1.4*	2.3	1.5
1996	*Third Level*	**14.9**	**16.2**	16.7	17.0	*17.0*	*16.3*	*16.6*	*17.4*	13.0	15.5

State

	1991		**1981**		**1971**			**Third Level**
Age Group	**M**	**F**	**M**	**F**	**M**	**F**		**1996**
<15	**28.2**	**24.2**	**37.6**	**32.3**	**52.4**	**44.1**		**M 16.5**
15-18	**53.0**	**57.4**	**47.4**	**53.4**	**36.2**	**43.9**		**F 16.8**
19-21	**7.0**	**8.5**	**5.5**	**6.4**	**3.4**	**4.2**		
22+	**5.9**	**3.9**	**4.7**	**2.6**	**3.2**	**1.6**		

Source: CSO (1978b) *Census of Population 1971, Vol. 12*; CSO (1987) *Census of Population 1981, Vol. 10*; CSO (1996b) *Census 91, Vol. 9*; CSO (1998a) *Census 96, Vol. 8*.

Table A.4 Principal economic status of persons aged 15 years and over 1991, 1996 (%) and % change 1981-1991

Northwest Region						
Economic status	**1996**		**1991**		**% Change**	
	M	**F**	**M**	**F**	**M**	**F**
At work	59.1	32.4	60.1	28.8	-14.9	18.1
Seeking first job	0.8	0.5	1.2	0.7	10.5	61.1
Unemployed	7.7	3.1	8.3	2.8	36.0	124.0*

Southwest Region						
Economic status	**1996**		**1991**		**% Change**	
	M	**F**	**M**	**F**	**M**	**F**
At work	57.8	32.8	58.3	28.8	-8.5	26.3
Seeking first job	0.9	0.5	1.4	0.8	51.8	38.7
Unemployed	10.1	3.9	10.4	3.4	55.7	116.9*

STATE						
Economic status	**1996**		**1991**		**% Change**	
	M	**F**	**M**	**F**	**M**	**F**
At work	59.0	35.8	58.6	30.8	-8.0	23.1
Seeking first job	1.2	0.7	1.6	1.0	63.9	75.8
Unemployed	10.3	4.1	11.5	4.0	60.7	143.0*

*n in base year = 0 or very low number

Source: CSO (1985a) *Census of Population 1981, Vol. 4*; CSO (1995) *Census 91, Vol. 4*; CSO (1998b) *Census 96, Vol. 5*

Table A.5 Persons at work classified by industrial group 1996, 1991 (%) and % change 1981-1991, 1971-1981

	Northwest					
	Agriculture, forestry and fishing		Other production industries (incl. building)		Services	
	1996	1991	1996	1991	1996	1991
M	30.8	36.2	33.1	26.3	36.0	37.5
F	5.0	7.0	19.8	16.7	75.1	76.3
	% change					
	1981-1991	1971-1981	1981-1991	1971-1981	1981-1991	1971-1981
M	-30.1	-34.7	-15.9	34.3	8.8	20.9
F	-10.4	-57.5	-3.8	129.1	28.2	38.8
	Southwest					
	Agriculture, forestry and fishing		Other production industries (incl. building)		Services	
	1996	1991	1996	1991	1996	1991
M	23.9	23.2	35.5	34.0	40.5	42.8
F	5.0	6.0	18.9	17.7	76.1	76.3
	% change					
	1981-1991	1971-1981	1981-1991	1971-1981	1981-1991	1971-1981
M	-16.6	-26.2	-18.5	19.9	7.8	16.9
F	43.5	-42.1	22.9	-8.7	25.9	29.9
	STATE					
	Agriculture, forestry and fishing		Other production industries (incl. building)		Services	
	1996	1991	1996	1991	1996	1991
M	16.4	19.1	36.5	32.4	47.0	48.5
F	3.0	3.9	20.1	17.8	76.8	78.2
	% change					
	1981-1991	1971-1981	1981-1991	1971-1981	1981-1991	1971-1981
M	-19.1	29.0	-18.9	16.7	7.4	22.4
F	25.0	-49.9	5.1	0.8	28.0	34.1

Source: CSO (1985a) *Census of Population 1981, Vol. 4*; CSO (1995) *Census 91, Vol. 4*; CSO (1998b) *Census 96, Vol. 5.*

Table A.6 Percentage of farms classified by farm type 1991

Region and county	Specialist tillage	Specialist dairying	Specialist beef production	Specialist sheep	Mixed grazing livestock	Mixed crops and livestock	Other
Northwest	**0.2**	**9.8**	**63.1**	**8.7**	**16.9**	**0.1**	**0.5**
Leitrim	–	7.2	71.9	9.8	10.4	0.04	0.6
Roscommon	0.2	6.2	60.2	8.3	23.8	0.2	0.8
Sligo	0.2	16.0	57.3	8.2	16.7	0.2	0.2
Southwest	**3.0**	**44.4**	**30.0**	**7.3**	**11.7**	**2.0**	**1.1**
Cork	5.3	47.9	26.0	4.0	11.5	3.7	1.5
Kerry	0.8	41.0	34.1	10.7	12.0	0.4	0.7
STATE	**3.0**	**24.3**	**42.0**	**8.6**	**18.0**	**2.5**	**1.3**

Source: CSO (1994b) *Census of Agriculture*

Table A.7 Number of industrial establishments and details of activity 1996, 1990, 1981

	Region					
	Northwest			Southwest		
Sector	1996	1990	1981	1996	1990	1981
Mining/quarrying/turf	6	4	5	19	4	12
Electricity/gas/water	2	2	2	15	16	15
Non-metallic mineral products	10	9	16	44	25	40
Chemicals	7	4	3	45	44	42
Metals/engineering	44	49	50	218	209	203
Food	23	26	35	153	157	181
Drink/tobacco	1	1	4	13	12	19
Textile industry	2	1	5	32	31	37
Clothing/footwear/leather	8	6	12	18	31	39
Timber/wooden furniture	22	18	27	25	47	73
Paper/printing/publishing	14	9	8	55	37	38
Miscellaneous	13	19	12	42	63	41
Total of all industries	**152**	**148**	**177**	**685**	**676**	**740**
Gross Industrial Output (£000)	720,305	453,192	228,026	7,669,397	4,639,500	1,991,488
Total employees	**6,820**	**5,287**	**6,114**	**33,904**	**29,790**	**33,482**
Males	4,250	3,337	4,026	23,559	21,395	25,902
Females	2,570	1,950	2,088	10,345	8,395	7,580

Source: CSO (1985b) *Census of Industrial Production, 1981*; CSO (1993b) *Census of Industrial Production, 1990*; CSO (1998c) *Census of Industrial Production, 1996*

Appendix B

Table B.1 The organisations interviewed

Organisation	Sector for which interviewed							
Name and geographical remit	**Crafts**	**Fish**	**Food**	**Organic produce**	**Rural tourism**	**Head-quarters**	**Main function**	**Focus***
Northwest region								
Regional								
International Fund for Ireland	✓	✓	✓	✓	✓		Economic & social development	AB
An Bord Tráchtála	✓						Promotion & marketing	AB
North West Tourism					✓	✓	Regional tourism organisation & marketing	QPS
Ireland West Tourism					✓	✓	Regional tourism organisation & marketing	QPS
North Western Regional Fisheries Board					✓	✓	Development of angling waters	QPS
West Coast Links					✓	✓	Promotion & marketing	SQPS
West BIC			✓			✓	Business support	SME
Sub-regional								
Leitrim County Enterprise Board	✓	✓	✓	✓	✓	✓	Business support	SME
Roscommon County Enterprise Board	✓	✓	✓	✓	✓	✓	Business support	SME
Sligo County Enterprise Board	✓	✓	✓	✓	✓	✓	Business support	SME
Sligo LEADER Partnership Co.	✓	✓	✓	✓	✓	✓	Business support	SME
Teagasc Sligo Rural Enterprise Service		✓	✓	✓			Rural enterprise support	AB
Local								
Arigna LEADER II	✓	✓	✓	✓	✓	✓	Business support	SME
Úna Bhán Tourism					✓	✓	Promotion & marketing	SQPS
North Leitrim Vegetable Growers' Association				✓		✓	Promotion & marketing	QPS
Total	**7**	**7**	**8**	**8**	**11**	**12**		
Southwest region								
Regional								
Údarás na Gaeltachta Crafts specialist	✓						Business support	QPS
An Bord Tráchtála	✓						Promotion & marketing	AB
Forbairt	✓						Business support	AB

Organisation	Sector for which interviewed							
Name and geographical remit	**Crafts**	**Fish**	**Food**	**Organic produce**	**Rural tourism**	**Head-quarters**	**Main function**	**Focus***
Cork Kerry Tourism					✓	✓	Regional tourism organisation & marketing	QPS
Shannon Development Tourism					✓		Regional tourism organisation & marketing	QPS
South West Ireland Golf Limited					✓	✓	Promotion & marketing	SQPS
Teagasc Food Enterprise Service		✓	✓	✓			Food enterprise support	QPS
Sub-regional								
Kerry County Enterprise Board	✓	✓	✓	✓	✓	✓	Business support	SME
Local								
West Cork Enterprise Board	✓	✓	✓	✓	✓	✓	Business support	SME
West Cork LEADER	✓	✓	✓	✓	✓	✓	Business support	SME
South Kerry Partnership	✓	✓	✓	✓	✓	✓	Business support	SME
Fuchsia Brands Company			✓		✓	✓	Development of regional brand	QPS
Total	**7**	**5**	**6**	**5**	**8**	**7**		
National remit								
Crafts Council of Ireland	✓					✓	Design & economic development	QPS
The Arts Council	✓					✓	Promotion of the arts	QPS
Teagasc Rural Tourism					✓		Advice	QPS
The Blue Book					✓	✓	Promotion & marketing	SQPS
Hidden Ireland					✓	✓	Promotion & marketing	SQPS
Irish Country Holidays					✓	✓	Promotion & marketing	SQPS
Bord Iascaigh Mhara		✓				✓	Development of fishing industry	QPS
Irish Organic Farmers' & Growers' Association				✓		✓	Organic production development & certification	SQPS
Organic Unit of the Department of Agriculture & Food				✓		✓	Organic production development & certification	SQPS
Cáis			✓			✓	Promotion & marketing	QPS
Real Foods of Ireland			✓			✓	Representation & education	SQPS
Organic Trust				✓		✓	Organic production development & certification	SQPS

Organisation	Sector for which interviewed							
Name and geographical remit	**Crafts**	**Fish**	**Food**	**Organic produce**	**Rural tourism**	**Head-quarters**	**Main function**	**Focus***
National Food Centre		✓	✓	✓		✓	Quality & product development	QPS
Bord Bia			✓			✓	Promotion, marketing & quality development	QPS
Total	**2**	**2**	**4**	**4**	**4**	**13**		
OVERALL TOTAL	**16**	**14**	**18**	**17**	**23**	**32**		

*AB = all business types; SME = SMEs only; QPS = a pertinent QPS sector only (e.g. handcrafts, rural tourism; may include non-QPS products in that sector); SQPS = a specific sampled QPS product only

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