



**MOUNTAIN  
HER**

# **Deliverable achievement report**

**Consumers' appreciation report**

**Deliverable 6.1.2**

**Synthesis of results of the 3 waves of the survey**



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**MOUNTAIN**

**HER**

**PRIMA**

PARTNERSHIP FOR RESEARCH AND INNOVATION  
IN THE MEDITERRANEAN AREA

## D 6.1.1 – Consumers’ appreciation report

### Description of the task

#### Digital sensorial panels

Sensorial panels of trained participants are the most adequate method to determine potential consumers’ interest toward a product. However, these tend to be expensive and cover only a small set of the potential consumers. The use of digital tool to reach out to a panel of users is a recent evolution of the same principle to connect with more consumers. A service provider will be involved, able to activate specific **CAWI (computer assisted web interviewing)** stratified panels in each of the countries involved in the project. The service provider will receive the questionnaires from the WP6 leader and will be responsible to obtain the surveys from all six countries using representative panels of potential consumers.

**Multiple-choice questions** will be used in the surveys and results collected in a database format onto MEL.

1. In the first round, 200 respondents per country will be sought to provide opinions on a **15 minutes survey**. A set of **20 images** showing various products packages will be presented. A total of 5 traditional foods and malt products will be presented, each with 3 different packages and **telling the “story” of their agro-ecological production using different key words**. In addition, 5 “check” foods representing well established commercial brands will be also included. **Two questions** will be asked for each image: what “emotion” the image has generated (1<sup>st</sup> and 2<sup>nd</sup> wave) and what is the level of interest in purchasing this product (2<sup>nd</sup> wave). The **scores** for the “check” product will be used to normalize the data across respondents.
2. The second survey will then be set up, this time involving 100 respondents per country. In this case, only the best 5 voted image and “story” will be shown but for each one, three different nutritional labels will be presented, each giving priority to a different dietary element. Five “checks” will also be included, showing their actual nutrition labels. Again, the digital consumers will be asked to define the “emotion” that the image generates in them from a set list, and how likely are they to purchase that specific product and with which price premium.
3. 10 consumers per country shall receive in their homes a sample of products: they will be asked to follow a simple recipe to cook them and taste them. Questionnaires will be administered to gather their appreciation. The final question will check their willingness to pay, and the conditions (product characteristics, packaging, etc.) that influence this aspect.

## Description of completion

All Countries completed the first two wave surveys, sharing the results, whereas only Italy and Croatia fulfilled the third one.

## Justification of delay

A 20 days delay is due to time needed to elaborate the data and the wait for the expected results (third wave) from the other Countries.

## Executive summary

- The **first wave survey** has proven to be very useful, and the possibility to interview, in parallel, a significant set of respondents in all six countries provided very interesting information. The survey, confirmed by smaller – scale surveys performed in Italy, proved that the products **could be usefully brought to the market by associating, on pack and other communication media the value elements of mountain production and female cooperative production, with the elements of connection with nature, happiness and a «healthy» feeling.** Of course, communication on health is strictly ruled and this should be taken into account, by expressing messages according authorised claims and by evocative images (in Europe, claims are ruled by Efsa).
- The **second wave survey** confirmed the role of **healthy food**, but mostly points out the relevance of **taste** as a purchase driver, as well as **ethical** and **eco-friendly** production methods. Taste can be an element of the appreciation of a visit to the mountains, which is a hedonistic element. And when the product has the preferred characteristics, a price premium is acceptable for most respondents. As far as nutrition is involved, particularly a higher percent of **proteins and fiber** can be preferred and should be evidenced in communication. Price is always a relevant element, but a significant share of respondents was ready to accept some price premium in exchange of the key value elements of the project: nature, tradition and the safeguard of the mountain natural and social environment.
- The **third wave survey** has been up to now performed only in Italy and Croatia, and revealed a good appreciation of the product, acceptance of its values and of a small price premium.

## Description of the activities

### a) FIRST WAVE SURVEY

In the **first wave survey**, 200 respondents per Country were asked to provide opinions on images showing various products packages. A total of 5 traditional foods and malt products were shown (pasta, couscous, barley flour, malt drink and bread), each with 3 different packages and telling the “story” of their agro-ecological production using different key words, such as: soil, self produced fertilizers, female farmers, ecology and harmony with nature. Two questions were asked for each image: what “emotion” the image has generated and what is the level of interest in purchasing this product.



**Figure 1** – The images of possible simplified packs shown to respondents

**Table 1** – Sentences on the pack, according to which respondents were asked to select emotions

Pasta	Malt drink	Couscous	Barley flour	Bread
2 "Soil is a delicate ecosystem: we treat it with care and respect"	6 "The eco-friendly drink from soil-respectful practices"	10 "Made with care by mountain female farmers who respect the soil ecosystem"	14 "Give your recipes an eco-friendly touch with soil-respectful barley"	18 "This bread comes from a production system that uses soil respectful techniques"
3 "We produce our own fertilizers, that are sustainable and environmentally friendly"	7 "With the strength of eco-friendly mountain barley"	11 "From strong, sustainable durum wheat thanks to internally produced fertilizers"	15 "Gentle and fragrant, from barley grown in harmony with nature"	19 "This bread comes from "closed-loop" agriculture: we produce our own fertilizers, that are sustainable and environmentally friendly"
4 "Produced via agroecology principles, to ensure a sustainable future"	8 "A sip of nature, from agro-ecological malt"	12 "Produced in harmony with nature, thanks to the application of agroecological techniques"	16 "The barley for this flour is grown following agro-ecological principles, for a better future"	20 "We follow agro-ecology principles, to ensure a sustainable future"

**Table 2** –List of possible emotions among which respondents were asked to choose 3, for each image

Emotions
Curious
Intrigued
Nostalgic (for the old days)
Modern
Connecting with nature
Pleasantly interested
Inspired
Healthy
Happy
Disgusted
Guilty
Unhealthy
Displeased
Frustrated
Bored
Doubtful
Indifferent
Hungry

The choice of products to be shown, even before each cooperative's project products were made, was done according to several considerations, that are listed in the table below.

**Table 3 – Reasons for the choice of products for the survey**

Product	Reason
Pasta	Made with durum wheat only, it's a staple food in Italy, and consumed in all the world. Its unit price can be very low, and its characteristics very basic, although consumers are used to differentiation strategies and to the presence of niche products. It is interesting to observe how claims regarding the pluses brought about by the MountainHER project can affect the preception of a very traditional, common food product.
Malt drink	Malt, made with barley, as a key ingredient, but not the only one, of beer. The chatacteristics of the malt drink consumers segments, especially as regards beer, is different, often including a higher share of men and young persons. The scope in this case is to test the effect – on the perception of consumers for this very specific product - of claims on environment-friendly choices, and on the production on mountains, by a female cooperative.
Couscous	Similarly to pasta, also couscous is a staple food, with elements of vertical differentiation in local markets. Also in thgis case, it is interesting to evaluate the impact of the very specific differentiation elements brought about by the MounainHER project.
Wholemeal barley flour.	The consumers target changes again: barley flour is an ingredient, therefore it affects not only persons who are responsible for the purchase of food for their family, but the subset of them that also cooks, and uses flours. The cooking activity is no longer present in all families, as the diffusion of ready-to-eat products confirms.
Wholemeal bread	Some countries see a decrease of bread consumption in quantity, but an increase of interest in «speciality bread». It is interesting to evaluate how this trend applieas to different ways to communicate a potential MountainHER bread.

## **b) SECOND WAVE SURVEY**

The purpose of the **second wave survey** was to analyze the response of 100 people per Country, aiming to better understand consumers' interests in the ethical, environmental and social values embedded in these products, as well as their willingness to purchase them regularly, based on the emotions these characteristics evoke.

Respondents were firstly asked who is primarily responsible for grocery shopping within their household, to ensure that all answers come from aware shoppers. Then, consumers were demanded

to ask specific questions on the characteristics sought in food products, on a Likert scale from “not interested” to “very important”, and how much they would be willing to pay for them.

As the previous survey, consumers were shown five products and were asked, for each image, to indicate how did the feel. They were presented with a list of emotions, and for each one, they had to choose whether they felt it “not at all”, “a little”, or “intensely”. And, related to the images, 4 different nutritional labels for each image were presented. Consumers were asked to select the most preferred one, how frequently would they be willing to purchase those products and how much would they be willing to pay for them.

**Immagine 1** Empowering women in mountain farming communities

**Pasta**

«IL SUOLO È UN ECOSISTEMA DELICATO: LO TRATTIAMO CON CURA E RISPETTO»

PRODOTTA CON GRANO DURO COLTIVATO IN MONTAGNA DA UNA COOPERATIVA FEMMINILE LOCALE

A		B	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	354 kcal	Energia	349 kcal
Grassi	1,2 g	Grassi	1,8 g
Acidi grassi saturi	0,3 g	Acidi grassi saturi	0,3 g
Carboidrati	71,4 g	Carboidrati	66,0 g
Zuccheri	3,2 g	Zuccheri	3,7 g
Fibre	3,5 g	Fibre	4,5 g
Proteine	13,4 g	Proteine	14,0 g
Sale	0 g	Sale	0,0 g

C		D	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	351 kcal	Energia	353 kcal
Grassi	1,5 g	Grassi	2,0 g
Acidi grassi saturi	0,3 g	Acidi grassi saturi	0,3 g
Carboidrati	69,0 g	Carboidrati	65,0 g
Zuccheri	2,9 g	Zuccheri	3,8 g
Fibre	2,5 g	Fibre	3,0 g
Proteine	14,0 g	Proteine	15,0 g
Sale	0,01 g	Sale	0,09 g

**Immagine 2** Empowering women in mountain farming communities

**Couscous**

«Prodotto in armonia con la natura, grazie all'applicazione di tecniche agroecologiche»

Con grano duro coltivato in montagna da una cooperativa femminile locale

A		B	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	360 kcal	Energia	338 kcal
Grassi	3,9 g	Grassi	3,9 g
Acidi grassi saturi	0,2 g	Acidi grassi saturi	0,4 g
Carboidrati	74 g	Carboidrati	65 g
Zuccheri	0,2 g	Zuccheri	3,4 g
Fibre	3,3 g	Fibre	8 g
Proteine	12,3 g	Proteine	12 g
Sale	< 0,01 g	Sale	< 0,04 g

C		D	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	354 kcal	Energia	346 kcal
Grassi	1,6 g	Grassi	1,5 g
Acidi grassi saturi	0,3 g	Acidi grassi saturi	0,3 g
Carboidrati	69,5 g	Carboidrati	67,3 g
Zuccheri	1,5 g	Zuccheri	2,1 g
Fibre	5,6 g	Fibre	6,6 g
Proteine	12,5 g	Proteine	12,5 g
Sale	+0,03 g	Sale	+0,03 g

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**Immagine 4** Empowering women in mountain farming communities

**BISCUITI**

«I BISCUITI DELLA TRADIZIONE, PRODOTTI CON INGREDIENTI LOCALI E FARINE OTTENUTE CON TECNICHE AGRO-ECOLOGICHE»

CON ORZO E FRUMENTO COLTIVATI IN MONTAGNA DA UNA COOPERATIVA FEMMINILE LOCALE

A		B	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	463 kcal	Energia	463 kcal
Grassi	38 g	Grassi	36 g
Acidi grassi saturi	20,7 g	Acidi grassi saturi	1,9 g
Carboidrati	51,9 g	Carboidrati	72 g
Zuccheri	19,2 g	Zuccheri	3,8 g
Fibre	4,2 g	Fibre	2,6 g
Proteine	8,3 g	Proteine	8,4 g
Sale	+0,03 g	Sale	+0,7 g

C		D	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	409 kcal	Energia	468 kcal
Grassi	20,9 g	Grassi	19,3 g
Acidi grassi saturi	2,7 g	Acidi grassi saturi	2,7 g
Carboidrati	67,7 g	Carboidrati	65,8 g
Zuccheri	39 g	Zuccheri	24,6 g
Fibre	4,4 g	Fibre	3,6 g
Proteine	7,8 g	Proteine	7,8 g
Sale	+0,09 g	Sale	1 g

**Immagine 5** Empowering women in mountain farming communities

**Farina d'orzo**

«Tale un'acqua moltiplica alla natura, grazie all'applicazione di tecniche agroecologiche»

Prodotto con orzo coltivato in montagna da una cooperativa femminile locale

A		B	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	363 kcal	Energia	361 kcal
Grassi	1,8 g	Grassi	1,8 g
Acidi grassi saturi	0,4 g	Acidi grassi saturi	0,3 g
Carboidrati	77,3 g	Carboidrati	70 g
Zuccheri	0,8 g	Zuccheri	0,8 g
Fibre	10 g	Fibre	12 g
Proteine	16,3 g	Proteine	10 g
Sale	0,03 g	Sale	10,01 g

C		D	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	370 kcal	Energia	336 kcal
Grassi	2 g	Grassi	1,4 g
Acidi grassi saturi	0,4 g	Acidi grassi saturi	0,3 g
Carboidrati	76 g	Carboidrati	70,5 g
Zuccheri	0,8 g	Zuccheri	0,7 g
Fibre	7 g	Fibre	3,2 g
Proteine	10 g	Proteine	10,4 g
Sale	0,03 g	Sale	0,01 g

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**Immagine 3** Empowering women in mountain farming communities

**BISCUITI**

«Migliorata dall'agroecologia, per assicurarsi un futuro sostenibile»

CON ORZO E FRUMENTO COLTIVATI IN MONTAGNA DA UNA COOPERATIVA FEMMINILE LOCALE

A		B	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	342 kcal	Energia	341 kcal
Grassi	6,98 g	Grassi	1,2 g
Acidi grassi saturi	1,2 g	Acidi grassi saturi	0,3 g
Carboidrati	69,2 g	Carboidrati	47,8 g
Zuccheri	0,9 g	Zuccheri	1,3 g
Fibre	2,6 g	Fibre	3,6 g
Proteine	8,3 g	Proteine	8,0 g
Sale	+1,4 g	Sale	+1,4 g

C		D	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	227 kcal	Energia	241 kcal
Grassi	1,6 g	Grassi	1,6 g
Acidi grassi saturi	0,3 g	Acidi grassi saturi	0,3 g
Carboidrati	63,8 g	Carboidrati	45,3 g
Zuccheri	2,3 g	Zuccheri	2,3 g
Fibre	3,6 g	Fibre	5,7 g
Proteine	8,7 g	Proteine	8,1 g
Sale	+1,3 g	Sale	+1,1 g

**Immagine 5** Empowering women in mountain farming communities

**Farina d'orzo**

«Tale un'acqua moltiplica alla natura, grazie all'applicazione di tecniche agroecologiche»

Prodotto con orzo coltivato in montagna da una cooperativa femminile locale

A		B	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	363 kcal	Energia	361 kcal
Grassi	1,8 g	Grassi	1,8 g
Acidi grassi saturi	0,4 g	Acidi grassi saturi	0,3 g
Carboidrati	77,3 g	Carboidrati	70 g
Zuccheri	0,8 g	Zuccheri	0,8 g
Fibre	10 g	Fibre	12 g
Proteine	16,3 g	Proteine	10 g
Sale	0,03 g	Sale	10,01 g

C		D	
Tabella nutrizionale	Valore per 100 g	Tabella nutrizionale	Valore per 100 g
Energia	370 kcal	Energia	336 kcal
Grassi	2 g	Grassi	1,4 g
Acidi grassi saturi	0,4 g	Acidi grassi saturi	0,3 g
Carboidrati	76 g	Carboidrati	70,5 g
Zuccheri	0,8 g	Zuccheri	0,7 g
Fibre	7 g	Fibre	3,2 g
Proteine	10 g	Proteine	10,4 g
Sale	0,03 g	Sale	0,01 g

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Figure 2 – Images and nutritional tables shown to consumers

Finally, the **third wave survey** was submitted to just 10 consumers per Country, that were asked to try to replicate at home a recipe of a sample of the chosen product and taste it. The survey aimed to check their willingness to pay, and the conditions (product characteristics, packaging, etc.) that influence this aspect.

## Respondents

The first wave survey was submitted to 200 respondents per Country, the second wave to 100 respondents per country, the third one to 10 respondents per country. In the first two wave, a good balance has been sought as regards age and gender, whereas, in order to obtain – as regards willingness to pay and willingness to purchase - by persons that could actually afford to perform the purchasing act, a quotas restraint has been introduced as regards education, focusing on large majority of respondents with a university degree and only a small share of respondents with a high school degree.

No quotas were given to the respondents of the third wave surveys.

In the two countries where this was performed as of June 19<sup>th</sup>, 2025:

- For the Croatian product, the flour was chosen. Respondents were 10 women, age between 18 and 70, living either in small cities or in rural areas, not working in the food industry, with high school and university education (50% each).
- Italy chose durum wheat semolina. Respondents were 6 women and 4 men, age between 26 and 65, 1 living in a rural area, 9 living in a city, 5 with high school education and 5 with an university degree.

## Results

1. According to the analysis of the **first wave survey**, besides underlining the production on mountains, by a female cooperative, communication should be focused on the following themes: Health, Nature, A happy mood.

THE MOST CHOSEN SENSATIONS

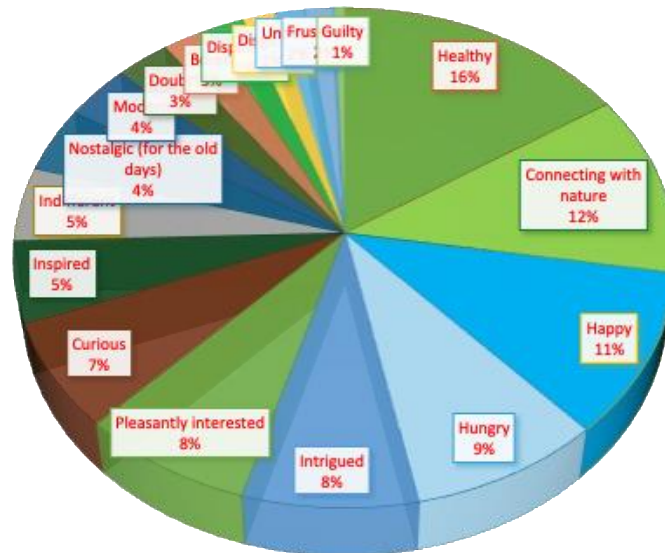


Figure 3 – The most chosen sensations in the wave 1 survey

Table 4 – The most chosen sensations by country

	The most chosen emotions, excluding benchmark products						
	All countries	Algeria	Croatia	Italy	Lebanon	Morocco	Tunisia
Healthy	15.6%	20.8%	11.3%	7.1%	14.9%	20.1%	19.5%
Connecting with nature	12.6%	12.8%	13.0%	10.2%	10.9%	13.7%	14.8%
Happy	10.8%	11.9%	7.0%	9.0%	12.3%	11.9%	12.9%
Hungry	7.3%	8.3%	6.4%	5.7%	8.3%	8.3%	7.0%
Intrigued	8.1%	6.7%	11.7%	11.9%	5.6%	5.7%	7.1%
Pleasantly interested	7.5%	7.2%	5.9%	12.5%	5.7%	8.0%	5.9%
Curious	7.0%	5.5%	7.9%	12.3%	6.6%	4.7%	5.0%
Inspired	5.4%	4.4%	5.6%	6.7%	5.8%	4.9%	5.2%
Indifferent	4.7%	3.8%	6.5%	4.4%	5.1%	3.7%	4.6%
Nostalgic (for the old days)	4.0%	4.2%	5.3%	2.6%	3.7%	3.5%	4.9%
Modern	3.6%	2.9%	3.0%	6.3%	3.6%	3.6%	2.2%
Doubtful	3.0%	2.9%	3.7%	3.8%	2.5%	2.5%	2.4%
Bored	2.5%	1.9%	5.2%	2.7%	1.8%	1.9%	1.6%
Displeased	2.0%	1.7%	1.3%	1.0%	3.7%	2.3%	2.2%
Disgusted	1.8%	1.4%	1.5%	0.9%	4.6%	1.2%	1.3%
Unhealthy	1.6%	1.5%	1.6%	1.1%	2.0%	1.9%	1.5%
Frustrated	1.6%	1.7%	2.3%	1.0%	1.7%	1.6%	1.4%
Guilty	0.7%	0.3%	0.6%	0.8%	1.2%	0.5%	0.5%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

These sensations are distributed rather transversally between the different segments, even if we can notice:

- a slightly higher percent of consumers living in Algeria, Morocco and Tunisia
- the repartition according to gender is almost the same as overall respondents (slightly higher percent of females)
- a slightly higher percent of younger consumers
- a slightly higher percent of persons living in large cities
- A slightly higher percent of persons with a University degree

2. The **second wave survey** showed that most respondents with a high educational degree care about ethical, environmental, and health-related values in food products. Therefore, communication about MountainHER products should focus on the following elements: ethics, low environmental impact techniques, and health benefits, conveying the following messages: “connection with nature,” “tradition,” “agroecological techniques,” and “respect for soil.”

Also through imagery, the following values and experiences should be evoked: tradition, belonging, respect for labor and the land, and a feeling of happiness.

From a nutritional standpoint, it is important, both in recipe development and communication, to highlight the following nutritional elements: fiber and proteins. In terms of gender and age, carbs and proteins are more sought after by men and younger individuals, while a high fiber content is preferred by women and older age groups.

Many are willing to pay up to 10% more for products that have these qualities, and there is also a share of respondents who would pay more.

Tasty food products are appreciated by everyone, and a good taste is taken for granted. Therefore, tasty features in the survey are often outperformed by products that offer health benefits or are made with respect for workers and the planet. For this reason, consumers have shown a greater willingness to pay a higher price for such products, whereas they may not be inclined to pay more for simply flavorful items.

When considering pricing, it is reasonable to assume that if the product possesses the highlighted characteristics and is well communicated, a price premium of 10%, and even something more, compared to a similar competing product, could be applied.

Lastly, awareness of agroecology was found to be rather low, but many respondents (especially younger people and those in Italy, Tunisia, and Morocco) were interested in learning more. The advise, from this point of view, is to organise communication moments targeted to consumers and farmers.

3. The **third wave survey** results showed that:

- Croatia: The MountainHER flour was rated very positively in the survey, with most respondents expressing high satisfaction with its qualities. The flour provided a significantly improved texture and taste of the dough, resulting in homemade products achieving a better result compared to those prepared with commercial flour.

5 respondents stated that they would probably buy this flour, 5 answered that their decision would depend on the product's price, 1 that it would depend on the products availability.

All respondents expect this flour to be sold at a higher price, and 5 of them place their expected price at 1.20-1.40 euros per kg, 3 of them: 1-1,20 €/kg, 2 of them: 0,8-1€/kg

The main reasons for this pricing are linked to the fact that urban consumers may have access to mountain grains ("strongly"+"somewhat" agree: 90%), that mountain farming is linked to more "natural" products (80%), that the grains production is keen on respecting the environment (100%), and the creation of jobs on mountains for women and young people (70%).

- Italy: the product is sufficiently good. Since Northern Italian recipes mostly use common wheat, it can be useful to enrich a common wheat recipe and must be used in mixture with common wheat flour.


Respondents stated that they would probably buy this flour, 1 answered that their decision would depend on the product's price. All respondents expect this flour to be sold at a higher price, and 8 of them place their expected price at 3-4 euros per kg, 2 of them at 2,5-3 euros per kg.

Respondents agree with all the proposed possible reasons for a higher price, and mostly with the link with tradition, and the role in helping fighting mountain abandonment. A comment was that they would prefer to buy ready bakery products, such as biscuits and other products.

*More details can be found in the powerpoint analysis of the three surveys and in the second wave survey report.*

# APPENDIX – QUESTIONNAIRES

## 1<sup>st</sup> wave



**WP6 1<sup>st</sup> Wave survey  
questionnaire for CAWI interview**

Italian original questionnaire translated into English

Nov 11 2023

**DATA QUALITY TRACKING:**

- RH USED (RH3, RH4)
- SPEEDERS CHECK NOT USED
- SL NOT USED
- BOE CHECK NOT USED

**HIDDEN VAR: WAVE (Single Choice)**

1. Wave 01
2. Wave 02

Please punch code 1

**HIDDEN VAR: RECCOUNTRY (Single Choice)**

1. ALGERIA
2. CROATIA
3. ITALY
4. LEANON
5. MOROCCO
6. TUNISIA

**S1. Which genre do you most recognize yourself in?** *Single Choice*

1. Man
2. Woman
3. I do not wish to answer this question

**S2. Please choose your age:** *Single Choice*

1. Less than 18 years → screen out
2. 18-24 years → screen out
3. 25-34 years
4. 35-44 years
5. 45-54 years
6. 55-65 years
7. Più di 65 years → screen out

**IF RECCOUNTRY=3**

**S3. Where do you live?** *Single Choice*

**SHOW THIS IF RECCOUNTRY=1**

1. Central Algeria
2. North East Algeria
3. North West Algeria
4. Saharan Algeria

**SHOW THIS IF RECCOUNTRY=2**

1. Dalmazia
2. Istria
3. Quarnaro
4. Croazia centrale e Slavonia

**SHOW THIS IF RECCOUNTRY=3**

1. Nord Ovest (Piemonte, Valle d'Aosta, Liguria, Lombardia)
2. Nord Est (Trentino-Alto Adige, Veneto, Friuli-Venezia Giulia, Emilia-Romagna)
3. Centro (Toscana, Umbria, Marche, Lazio)
4. Sud e isole (Abruzzo, Molise, Puglia, Campania, Basilicata, Calabria, Sicilia, Sardegna)

**SHOW THIS IF RECCOUNTRY=4**

1. akkar
2. Bekas
3. Nabatieh
4. Baalbek-Plesmet
5. Beirut
6. Monte Libano
7. Sud Libano
8. Nord Libano

**SHOW THIS IF RECCOUNTRY=5**

1. Atlantic Morocco
2. Mediterranean Morocco
3. Saharan Morocco

**SHOW THIS IF RECCOUNTRY=6**

1. North East: Bizerte, Manouba, Ariana, Tunisi, Ben Arous, Zaghwan, Nabeul
2. North West: Jendouba, Béja, Siliana, Kef
3. Center East: Sousse, Monastir, Mahdia, Sfax
4. Center West: Kairouan, Sidi Bouzid, Kasserine
5. South East: Gabès, Medenine, Tataouine
6. South West: Gafsa, Tozeur, Kébili

**PLEASE INSERT RH3**

**S4. What is your educational level?** *Single Choice*

1. Elementary school → SCREENOUT
2. Middle school
3. High school
4. University

**HIDDEN VAR: EDUCATION (Single choice – Quota check)**

1. Middle/High school → S4 CODE 2 OR 3 (10%)
2. University → S4 CODE 4 (90%)

Start with this objective and in case of errors you stop and you make a decision together.

**S5. In your family, who is responsible for food purchase?** *Single Choice*

1. Salatamente io
2. Prevalentemente io e altri membri
3. Altri membri della famiglia, non io → SCREENOUT

**S6. How large is the place where you live?** *Single Choice*

1. Large city (> 1.000.000 inhabitants)
2. Medium city (tra 250.000 e 1.000.000 inhabitants)
3. Urban centre with 50.000 - 250.000 inhabitants
4. Rural area or sparsely populated area (less than 50.000 inhabitants)

**S7. How can the area where you live be classified?** *Single Choice*

1. Plains
2. Hill
3. Mountain

**PLEASE INSERT RH1**

**INTRO.** Thank you for your participation in the MountainHER project's first consumer survey (<https://mcl.cqar.org/projects/2020/01/06/>). The title of the project is "Supporting women's associations as drivers of agroecological transformation to generate income for mountain agricultural communities".

The project, which takes a holistic farm-to-table approach, therefore aims at identifying the best ways to develop locally made traditional food and craft products that involve different elements of value: value that consumers can appreciate and reward.

This survey, which will be followed by other, more in-depth ones, is a first step to determine the interest of potential consumers towards the specific determinants of value that characterise the potential products of the project.

As the first element of evaluation we consider, as per the project methodology, the emotions aroused by the product and its aesthetic characteristics.

In this questionnaire you will be asked to look at extremely stylised images of different packages (or labels) for products that can be made with durum wheat and barley.

These are not real examples of packaging: they are made very simply so that you can focus your attention on the messages.

You will be shown 5 products (pasta, beer, barley flour for home use, couscous and bread), each in 4 versions that differ only in a short description (text) which could be included in the product packaging.

This description should evoke emotions in customers. You will then be asked to choose, from a list, the main emotions you feel when looking at the image but above all reading the message.

Since it is necessary to observe images, the compilation may be easier from the PC than from the smartphone. (Info)

LOOP START – ASK FOR EACH FOR THE 20 IMAGES D1 AND D2 – DO NOT RANDOMIZE

D1. Please look at this image for a few seconds, carefully reading what you find written: what emotion do you feel?

Then choose three sensations from those listed here, those closest to your sensations.

Only THREE answers are allowed,

I feel: (MA, max. 3 answers per column; DO NOT randomize, SHOW IMAGE BASED ON COUNTRY, ZOOMABLE)

1. Intrigued
2. Indifferent
3. Hungry
4. Disgusted
5. Happy
6. Displeased
7. Connecting with nature
8. Frustrated
9. Healthy
10. Unhealthy
11. Guilty
12. Pleasantly interested
13. Nostalgic (for the old days)
14. Modern
15. Curious
16. Doubtful
17. Inspired
18. Bored

D2. Do you have any comments/suggestions to make about the image you just saw? (OPEN, MANDATORY, SHOW ZOOMABLE IMAGE)

END LOOP

END. Thank you for your contribution! (Info)

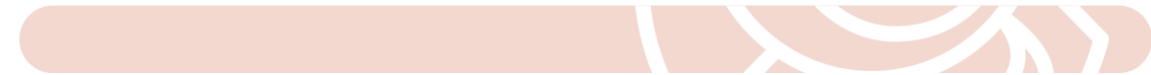
## 2<sup>nd</sup> wave

S5. How important do you consider the following characteristics of the food products you usually buy?

(1 = not at all important; 5 = very important)

[Rotate items – One response per row required]

Characteristic	1	2	3	4	5
1. Must contain nutrients with positive health effects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Must be produced with low environmental impact techniques	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Must be local products, km 0	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Must be tasty and flavorful	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Must be ethically produced	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Must be organic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Must have the lowest possible price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Must be traceable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



**Important Note:** DO NOT ask the following question to those who answered “quite important” or “very important” to item 7 (lowest price) in question S5.

**S6. Now think of a food product that fully reflects the values you consider important (as discussed above). How much more would you be willing to pay for such a product compared to a similar product without those characteristics?**

(Single Choice – do not rotate items)

1. It should cost the same
2. I could accept a price up to 10% higher
3. I could accept a price up to 20% higher
4. I could accept a price up to 30% higher

**S7. How familiar are you with the principles of agroecology?**

(Single Choice – do not rotate items)

1. I don't know them and I'm not interested
2. I don't know them, but I'm interested in learning more
3. I know them well enough, no need for more information
4. I know a little and would like to know more
5. I know them fairly well, but would still like to go deeper
6. I know them very well and I'm interested
7. I know them very well, but I'm not particularly interested

**D1. Please look at this label and read carefully. What emotion/sensation do you feel when viewing this product? Please indicate the intensity of the following emotions (One response per row – rotate items):**

Emotion	Not at all	A little	Very much
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**D2. Now you'll see four different possible nutritional labels for this product. Please choose the one you prefer based on the information provided.**

(Single Choice – A, B, C, or D)

**D3. Only regarding the nutritional table you chose:**

Based on this product and your preferred nutritional characteristics, how often would you buy it?

(Single Choice)

1. Never
2. Once a week
3. Once or twice a month
4. Three or four times a year
5. I don't know



**Do you agree?**

= Yes = No

Below are some reasons for this pricing. Please rate how much you agree with each statement on a scale from 1 to 5:

(1 = Strongly Disagree, 2 = Somewhat Disagree, 3 = Neutral, 4 = Somewhat Agree, 5 = Strongly Agree)

Reason	5	4	3	2	1
The products make mountain-grown grains available to urban consumers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being mountain-grown, they are likely more "natural."	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The grains are cultivated using agroecological techniques that respect the environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The project creates job opportunities for women and young people in mountain areas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The initiative empowers women and youth in decision-making and economic roles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
This is a project to combat depopulation in mountain areas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
These products have high gastronomic value.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The products are traditional.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The products are genuine and authentic.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**D4. Again referring to your preferred nutritional table:**

How much more would you be willing to pay for this product compared to a similar one without those characteristics?

## 3rd wave

### B) The Test

We invite you to use MountainHER re-milled semolina in any way you prefer, as the main ingredient in dishes you regularly prepare.

**B1) Please list all the products you made using the semolina:**

---

**B2) How did the test go?**

How would you compare MountainHER semolina with the semolina you typically use? Did you like it?

Please provide your detailed feedback below:

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**B3) Would you consider purchasing this semolina regularly?**

(Please select **only one** option.)

- Probably not
- Probably yes
- It depends on the price
- It depends on availability/ease of purchase
- I'm not sure

**C) Perceived Value**

**C1) What do you think is a fair price for this product?**

Please indicate below the price you consider reasonable for a 1 kg package:

€ \_\_\_\_\_



**MOUNTAIN  
HER**

Empowering women in mountain  
farming communities



**PRIMA**  
PARTNERSHIP FOR RESEARCH AND INNOVATION  
IN THE MEDITERRANEAN AREA