THE NEW FOOD-RELATED LIFESTYLE: A MODULAR APPROACH TO IDENTIFYING AND PROFILING PAN-NATIONAL CONSUMER SEGMENTS

KAREN BRUNSØ

AARHUS BSS
MAPP CENTRE – RESEARCH ON VALUE CREATION IN THE FOOD SECTOR
DEPARTMENT OF MANAGEMENT
AARHUS UNIVERSITY

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OVERVIEW

- International segmentation today and its importance
- Food-related lifestyle – an instrument applied during many decades
- The new modular approach to food-related lifestyle
- Results from two studies in 2018
- Next steps and perspectives to international segmentation

INTERNATIONAL CONSUMER SEGMENTATION AND ITS IMPORTANCE TODAY

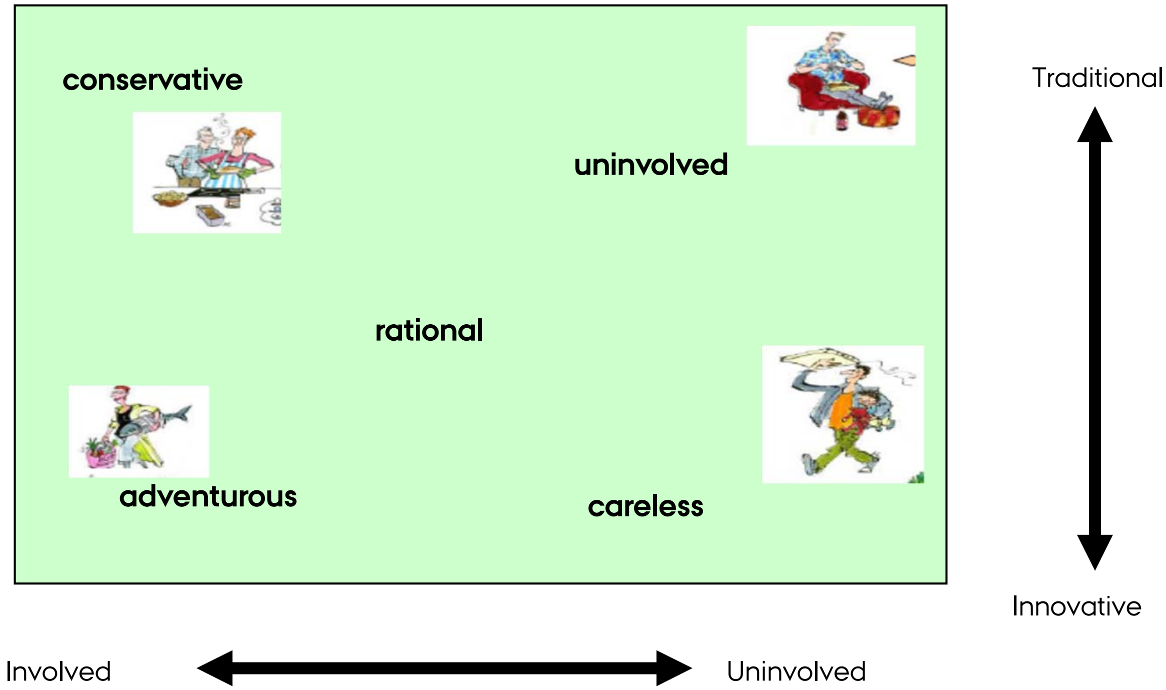
- Basically international segmentation relies on instruments or approaches with the ability to group consumers into segments with homogeneous needs and wants within segments - and heterogeneous needs and wants across segments
- The value of an international segmentation instrument depends on whether the approach
  - Has theoretical justification – e.g. not only based on demographic criteria
  - Can be applied to a cultural unit across national boarders
  - Is cross-culturally valid – so results can be compared internationally
  - Can be used to identify consumer behavior differences (managerial justification)
- Segmentation and its importance
  - We are – as consumers – not alike, and international differences and similarities create opportunities for marketing and product development

Grunert, K.G. (forthcoming), International segmentation in the food domain: Issues and approaches, *Food Research International* .

FOOD-RELATED LIFESTYLE FROM THE START

- Based on cognitive psychology, a survey instrument was developed in the 90'ties
- Cross-cultural measurement across Europe formed the basis for a master questionnaire that in total count 69 items in 5 food related areas:
  - Shopping for food
  - Product quality aspects
  - Cooking and meal preparation
  - Consumption situations
  - Motives behind behaviour
- Applied extensively over the years across many countries
  - proven to provide reliable results and cross-cultural segments
- Five segments with similar profile emerged in most countries – conservative, rational, adventurous, careless, uninvolved

CROSS CULTURAL SEGMENTS AND DIMENSIONS



THE CONSERVATIVE FOOD CONSUMER

- average with respect to shopping behaviour, novelty/new ways not important, taste important, fast/easy not important, planning
- food is woman's task, social aspects in food not important, but self-fulfilment and security important

THE ADVENTUROUS FOOD CONSUMER

- average shopping behaviour, novelty and looking for new ways very important, health, freshness and organic products also important
- high involvement with cooking, fast/easy not important, task of whole family, not a woman's task
- dining out important, self-fulfilment and social aspects more important than security

THE NEW MODULAR FRL – BACKGROUND AND ANALYSIS

- Need for a renewal of the FRL instrument
- **WHY:** Need for a shorter and updated version covering new modern dimensions
- **HOW:** We decided to retain the central dimensions of **innovation** and **involvement**
- **NEW:** Issues around **responsibility** were missing so we developed new items around this dimension
- **Three core dimensions**: innovation; involvement and responsibility

THE NEW MODULAR FRL – DATA AND ANALYSIS

DATA COLLECTIONS:

- In spring 2017 – the first data collection (online survey) in Denmark (N = 500) took place
- As results were very promising we decided for more data collections in order to verify the Danish results
- Spring 2018: 2 more samples collected in Australia (Online survey, N = 500) and Hungary (Face to face interviews, N = 500)

(with support from Dawn Birch, Faculty of Arts, Business and Law, University of the Sunshine Coast, Sippy Downs, Queensland, Australia and

Ágoston Temesi & Zoltan Lakner, Department of Food Economics, Szent István University, Budapest, Hungary)

THE NEW MODULAR FRL – FIRST INSIGHTS

- 5 items for each of the three core dimensions were identified across the three countries (only one correction compared to the first DK data analysis)
- The 15 items form the basis for segmentation
- Furthermore 34 new food related dimensions/add-on modules were identified and developed (3 items each) to be relevant for profiling food-related segments

- 21 of the 34 modules had good scale reliability across the three countries
- The other dimensions needed further scale development in order to be reliable

CORE INSTRUMENT

Responsibility (CA = 0.85)	
I try to choose food produced with minimal impact on the environment	.834
I try to choose food that is produced in a sustainable way	.808
I am concerned about the conditions under which the food I buy is produced	.751
It is important to understand the environmental impact of our eating habits	.733
I try to buy organically produced foods if possible	.699
Innovation (CA = 0.85)	
I love to try recipes from different countries	.817
Recipes and articles on food from other culinary traditions encourage me to experiment in the kitchen	.772
I look for ways to prepare unusual meals	.730
I like to try out new recipes	.715
I like to try new foods that I have never tasted before	.705
Involvement (CA = 0.81)	
Food and drink is an important part of my life	.788
Eating and drinking are a continuous source of joy for me	.744
Eating and food is an important part of my social life	.701
I just love good food	.695
Decisions on what to eat and drink are very important for me	.657

ANALYSIS: 21 RELIABLE ADD-ON MODULES

- Planning and shopping:
  - Use of technology for shopping, Product information
- Product quality aspects:
  - Organic and natural, Natural and free-range, Weight management, Origin, Animal welfare
- Transport and storage
  - Disposal, Food waste
- Preparation:
  - Cooking, Ready-made, Convenience

ANALYSIS: 21 RELIABLE ADD-ON MODULES

- Serving and consumption:
  - Sharing experiences, Symbolic value, Familiarity, Hedonic consumption, Snacking, Foodie Behaviour
- Influencers:
  - Promotional activities, Price sensitivity, Social media and celebrity chefs, Self-monitoring, Diligence with food

- **Further work** on modules that did not yield scale reliability at a satisfactory level will be conducted in next round of data collections in **UK, USA and NZ**

INTERNATIONAL SEGMENTS

- ***Uninvolved Food Consumer*** - unconcerned about food, uninterested in relation to all three core dimensions: DK 11%, HUN 20 %, AU 24 %.
- ***Adventurous Food Consumer*** - involved in all aspects of food: DK 33 %, HUN 19 %, AU 15 %.
- ***Conservative Food Consumer*** - not very interested in change and innovation, but look for stability and well-known food: DK 14%, HUN 9%, AU 7 %.
- ***Careless Food Consumer*** - similar to uninterested - not very into food in general, but are often slightly interested in technology: DK 24 %, HUN 23 %, AU 8 %.

USE OF TECHNOLOGY FOR SHOPPING

Use of Technology for shopping (CA = .81; .79: .75: .78)	% Agree	Total	Den	Hun	Aus
Shopping apps assist me with food purchasing choices.	16.4%	2.48	2.10 [a]	2.01 [a]	3.31 [b]
I use recipe apps to generate shopping lists.	14.8%	2.33	1.97 [a]	1.95 [a]	3.06 [b]
I use my smartphone for information when shopping.	21.5%	2.64	2.39 [b]	1.96 [a]	3.58 [c]

SHARING EXPERIENCES

Sharing Experiences (CA = .88: .89: .79: .90)	% Agree	Total	Den	Hun	Aus
I often take photos of food when dining out to share with friends on social media.	18.6	2.50	2.17 b	2.13 a	3.20 b
I like to take photos of food cooked at home to share with friends on social media.	19.8	2.52	2.09 a	2.25 b	3.23 b
I take pictures of interesting and unusual food when travelling and share these on social media.	21.7	2.69	2.37 a	2.23 a	3.45 b

WEIGHT MANAGEMENT

Weight management (CA = .72: .74: .62: .74)	% Agree	Tot	Den	Hun	Aus
I try to follow a diet to control my weight.	34.4	3.51	3.43 [b]	3.09 [a]	4.02 [c]
I watch my calorie intake.	34.7	3.60	3.63 [b]	3.13 [a]	4.04 [c]
I look for products which are lower in sugar and/or salt.	47.3	4.20	3.77 [a]	4.10 [b]	4.74 [c]

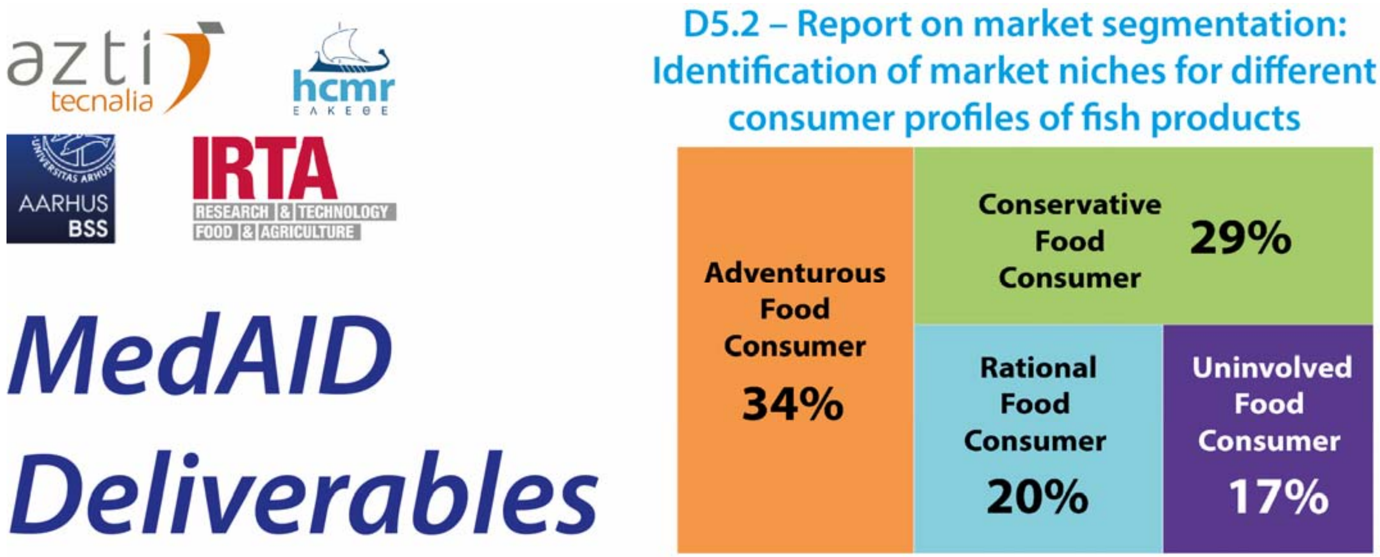
SNACKING BEHAVIOUR

Snacking Behaviour (CA = .78: .75: .73: .77)	% Agree	Tot	Den	Hun	Aus
I eat a lot of snacks rather than having set meal times.	25.8	3.25	2.44 [a]	3.51 [b]	3.80 [c]
I tend to snack during the day, which often means I am not hungry at mealtimes.	29.4	3.34	2.57 [a]	3.60 [b]	3.86 [c]
I eat a lot of small meals rather than keeping to fixed mealtimes.	32.8	3.61	3.10 [a]	3.84 [b]	3.89 [b]

SEGMENTS AND ADD-ON MODULES

- Use of Technology for Shopping
  DK : The Adventurous, HUN: The Adventurous and The Careless, AUS: The Adventurous. In none of the counties The Conservatives had any interest
- Sharing Experiences:
  DK: The Adventurous, HUN: The Adventurous and The Careless, AUS: The Adventurous. In none of the counties The Conservatives had any interest
- Weight Management:
  DK: The Adventurous and The Conservatives, HUN: The Adventurous and The Conservatives, AUS: The Adventurous and The Conservatives
- Snacking Behaviour:
  DK: The Careless and The Adventurous, HUN: The Adventurous, AUS: The Adventurous

EU PROJECT MEDAID AND USE OF MFRL CORE IN 2018



Author/s: Violeta Stancu (Aarhus), Karen Brunsø (Aarhus), Irene Peral (AZTI), Elena Santa Cruz (AZTI), Begoña Alfaro (AZTI), Athanasios Krystallis (HCMR) and Luis Guerrero (IRTA)

A PROJECT ON AQUACULTURE AND PRODUCT INNOVATION

- Aim of project in brief: to develop and measure the potential of new innovative fish products from three species: seabass, seabream, meagre
- The Core FRL instrument (15 items) applied with a number of scales of particular interest for this project
- Data collected in August 2018 in three European countries (Spain, France, Germany) N=500 in each country

Adventurous Food Consumer 34%

- High promising consumer segment for new aquaculture products
- Familiar with MedAID species
- Responsible consumers, interested in all food aspects, and looking for innovative products
- Frequent seafood buyers & consumers

Conservative Food Consumer 29%

- Less willing to buy new aquaculture fish products
- Involvement in food a bit below average
- Consumers that looks more for stability and well-known food products. Not very interested in changes, innovation and responsible solutions
- Average frequencies to buy and consume fish

Rational Food Consumer 20%

- Promising consumer segment for new aquaculture products
- Interested in new aquaculture fish products
- Involved in food products, food choices and looking for innovative products
- Interest in responsibility and sustainability slightly below average

Uninvolved Food Consumer 17%

- Non promising consumer segment for new aquaculture products
- Unconcerned about food
- Uninterested in innovation or responsibility
- Buy and eat fish less frequently

MEDAID AND INDUSTRY RELEVANCE

- Based on results two segments have been selected as having most potential – the adventurous and rational food consumer
- Other partners in the project have developed new product concept ideas based on species and input from industry
- Next step is to get evaluations from consumers: here a qualitative approach will be applied including creative and projective techniques
- Expected outcome is knowledge about consumer acceptance of new product ideas and potential of future demand linked to the international segments

FUTURE INTERNATIONAL SEGMENTATION PERSPECTIVES AND CONCLUSIONS

- International segmentation is more relevant that ever
- Adaptation to individual purposes of studies and marketing aims has to be possible via flexibility in measurement instruments
- Further analysis of segments across countries and next revision of the add-on modules will follow
- New data collections in the USA, UK and NZ has been finalized in November 2018

THANK YOU!

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