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

KAREN BRUNSØ
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

FOOD-RELATED LIFESTYLE FROM THE START

- Based on cognitive psychology, a survey instrument was developed in the 90's.
- Cross-cultural measurement across Europe formed the basis for a master questionnaire that in total counted 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

conservative  rational  adventurous  careless

Traditional  Innovative

Involving  Uninvolved
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)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>I try to choose food produced with minimal impact on the environment</td>
<td>.834</td>
</tr>
<tr>
<td>I try to choose food that is produced in a sustainable way</td>
<td>.808</td>
</tr>
<tr>
<td>I am concerned about the conditions under which the food I buy is produced</td>
<td>.751</td>
</tr>
<tr>
<td>It is important to understand the environmental impact of our eating habits</td>
<td>.733</td>
</tr>
<tr>
<td>I try to buy organically produced foods if possible</td>
<td>.699</td>
</tr>
</tbody>
</table>

#### Innovation (CA = 0.85)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>I love to try recipes from different countries</td>
<td>.817</td>
</tr>
<tr>
<td>Recipes and articles on food from other culinary traditions encourage me to experiment in the kitchen</td>
<td>.772</td>
</tr>
<tr>
<td>I look for ways to prepare unusual meals</td>
<td>.730</td>
</tr>
<tr>
<td>I like to try out new recipes</td>
<td>.715</td>
</tr>
<tr>
<td>I like to try new foods that I have never tasted before</td>
<td>.705</td>
</tr>
</tbody>
</table>

#### Involvement (CA = 0.81)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and drink is an important part of my life</td>
<td>.788</td>
</tr>
<tr>
<td>Eating and drinking are a continuous source of joy for me</td>
<td>.744</td>
</tr>
<tr>
<td>Eating and food is an important part of my social life</td>
<td>.701</td>
</tr>
<tr>
<td>I just love good food</td>
<td>.695</td>
</tr>
<tr>
<td>Decisions on what to eat and drink are very important for me</td>
<td>.657</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Use of Technology for shopping (CA = .81; .79: .75: .78)</th>
<th>% Agree</th>
<th>Total</th>
<th>Den</th>
<th>Hun</th>
<th>Aus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping apps assist me with food purchasing choices.</td>
<td>16.4%</td>
<td>2.48</td>
<td>2.10&lt;sup&gt;a&lt;/sup&gt;</td>
<td>2.01&lt;sup&gt;a&lt;/sup&gt;</td>
<td>3.31&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>I use recipe apps to generate shopping lists.</td>
<td>14.8%</td>
<td>2.33</td>
<td>1.97&lt;sup&gt;a&lt;/sup&gt;</td>
<td>1.95&lt;sup&gt;a&lt;/sup&gt;</td>
<td>3.06&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>I use my smartphone for information when shopping.</td>
<td>21.5%</td>
<td>2.64</td>
<td>2.39&lt;sup&gt;b&lt;/sup&gt;</td>
<td>1.96&lt;sup&gt;a&lt;/sup&gt;</td>
<td>3.58&lt;sup&gt;c&lt;/sup&gt;</td>
</tr>
</tbody>
</table>
## Sharing Experiences

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree</th>
<th>Total</th>
<th>Den</th>
<th>Hun</th>
<th>Aus</th>
</tr>
</thead>
<tbody>
<tr>
<td>I often take photos of food when dining out to share with friends on social media.</td>
<td>18.6</td>
<td>2.50</td>
<td>2.17&lt;sup&gt;b&lt;/sup&gt;</td>
<td>2.13&lt;sup&gt;a&lt;/sup&gt;</td>
<td>3.20&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>I like to take photos of food cooked at home to share with friends on social media.</td>
<td>19.8</td>
<td>2.52</td>
<td>2.09&lt;sup&gt;a&lt;/sup&gt;</td>
<td>2.25&lt;sup&gt;b&lt;/sup&gt;</td>
<td>3.23&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
<tr>
<td>I take pictures of interesting and unusual food when travelling and share these on social media.</td>
<td>21.7</td>
<td>2.69</td>
<td>2.37&lt;sup&gt;a&lt;/sup&gt;</td>
<td>2.23&lt;sup&gt;a&lt;/sup&gt;</td>
<td>3.45&lt;sup&gt;b&lt;/sup&gt;</td>
</tr>
</tbody>
</table>
## WEIGHT MANAGEMENT

<table>
<thead>
<tr>
<th>Weight management</th>
<th>% Agree</th>
<th>Tot</th>
<th>Den</th>
<th>Hun</th>
<th>Aus</th>
</tr>
</thead>
<tbody>
<tr>
<td>(CA = .72: .74: .62: .74)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I try to follow a diet to control my weight.</td>
<td>34.4</td>
<td>3.51</td>
<td>3.43</td>
<td>3.09</td>
<td>4.02</td>
</tr>
<tr>
<td>I watch my calorie intake.</td>
<td>34.7</td>
<td>3.60</td>
<td>3.63</td>
<td>3.13</td>
<td>4.04</td>
</tr>
<tr>
<td>I look for products which are lower in sugar and/or salt.</td>
<td>47.3</td>
<td>4.20</td>
<td>3.77</td>
<td>4.10</td>
<td>4.74</td>
</tr>
</tbody>
</table>
## Snacking Behaviour

<table>
<thead>
<tr>
<th>Snacking Behaviour</th>
<th>% Agree</th>
<th>Tot</th>
<th>Den</th>
<th>Hun</th>
<th>Aus</th>
</tr>
</thead>
<tbody>
<tr>
<td>I eat a lot of snacks rather than having set meal times.</td>
<td>25.8</td>
<td>3.25</td>
<td>2.44</td>
<td>3.51</td>
<td>3.80</td>
</tr>
<tr>
<td>I tend to snack during the day, which often means I am not hungry at mealtimes.</td>
<td>29.4</td>
<td>3.34</td>
<td>2.57</td>
<td>3.60</td>
<td>3.86</td>
</tr>
<tr>
<td>I eat a lot of small meals rather than keeping to fixed mealtimes.</td>
<td>32.8</td>
<td>3.61</td>
<td>3.10</td>
<td>3.84</td>
<td>3.89</td>
</tr>
</tbody>
</table>
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:

- Snacking Behaviour:
  DK: The Careless and The Adventurous, HUN: The Adventurous, AUS: The Adventurous
EU PROJECT MEDAID AND USE OF MFRL CORE IN 2018

**MedAID Deliverables**

D5.2 – Report on market segmentation: Identification of market niches for different consumer profiles of fish products

<table>
<thead>
<tr>
<th>Consumer Profile</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adventurous Food Consumer</td>
<td>34%</td>
</tr>
<tr>
<td>Conservative Food Consumer</td>
<td>29%</td>
</tr>
<tr>
<td>Rational Food Consumer</td>
<td>20%</td>
</tr>
<tr>
<td>Uninvolved Food Consumer</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Authors:** 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 than 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!
MAPP CENTRE – RESEARCH ON VALUE CREATION IN THE FOOD SECTOR
DEPARTMENT OF MANAGEMENT
AARHUS UNIVERSITY