

# **FOOD-RELATED LIFESTYLE IN SPAIN**

**Project paper**

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# **FOOD-RELATED LIFESTYLE IN SPAIN**

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## **EXECUTIVE SUMMARY**

1. This report contains the main results of a survey of food-related lifestyle in Spain, based on a representative sample of 1000 Spanish households.
2. Generally speaking, Spanish food consumers are very interested in shopping for food and cooking. Compared with other European food consumers, however, they are also very conservative, both in their choice and use of food.
3. Spanish food consumers can be divided into five segments, which differ both in the way they use food and in the importance it has for their attainment of central life values. The segments can only to a small extent be described by means of demographic characteristics.
4. The adventurous food consumers constitute 20% of the population. These are involved food consumers who like both shopping for food and cooking, and who are constantly on the lookout for new products and recipes. They attach a lot of importance to the social role of food.
5. The conservative food consumers constitute 26% of the population. Security is an important purchasing motive for these food consumers, which is reflected in the fact that they only buy familiar products, and cook and eat food traditionally. Apart from this, they are not particularly interested in either shopping or cooking.
6. The uninvolved food consumers constitute 16% of the population. These food consumers are neither interested in shopping, cooking, nor the quality of the food they eat, and food is not an important element in their lives. The most important purchasing criterion for these food consumers is that food should be easy to cook.
7. The rational food consumers constitute 26% of the population. These are highly involved food consumers who are both price conscious and check product information when they go shopping, and who generally attach a lot of importance to food quality. They have a practical-rational attitude to cooking and eating, while at the same time stressing the social importance of food.
8. The enthusiastic food consumers constitute 12% of the population. These food consumers have the strongest purchasing motives of all the segments. They put a lot of energy into shopping and cooking, both of which are highly planned. These food consumers go after high quality natural products, and keep a watchful eye on prices.
9. The enthusiastic food consumers, followed by the rational food consumers, care most about ecology, animal welfare and genetic engineering in connection with food. Including political considerations in purchasing decisions is most widespread among the uninvolved food consumers, however.



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## **1. MARKET SURVEILLANCE AND FOOD-RELATED LIFESTYLE**

This report presents the results of a MAPP survey of food-related lifestyle among Spanish food consumers. The survey was carried out in Spring, 1996, and is similar to other surveys of food-related lifestyle carried out previously in Germany, France, Great Britain and Denmark.

The food-related lifestyle surveys are part of MAPP's research activities in market surveillance. Put briefly, market surveillance is the collection of information about the developments/trends that can be expected to influence the sales of a firm's products in a given market. When market surveillance is carried out systematically and continuously, it is said to constitute a market surveillance system. Such a system should include both customers (distributors and food consumers), competitors, and the general attractiveness of the market.

Food-related lifestyle has been developed by MAPP as a tool for market surveillance of food consumers. Continuous market surveillance in this area has two overall aims: first, via repeated surveys in the same country, to get an idea of how food consumers' behaviour and attitudes to food change, and, second, by comparing the results of surveys in different countries, to get an idea of the differences/similarities between food consumers in these countries.

Food-related lifestyle is thus a means by which food consumers' attitudes to food in different countries can be continuously measured. The theoretical basis and development of the tool is described in MAPP working paper no. 12.

Prior to this survey, similar surveys were carried out in Germany, France, Great Britain and Denmark. The results of these surveys are presented in separate reports, while a comparison of food-related lifestyle in these countries appears in MAPP working paper no. 35.

Food-related lifestyle differs from other lifestyle tools in the following way:

- It is theoretically based on modern cognitive psychology.
- It doesn't try to reduce food consumers to objects that can be measured in two dimensions.
- It has been tested for its ability to compare measurements across cultural and linguistic boundaries.
- It has been developed specifically for the food industry, because general (non-product-specific) lifestyle instruments are losing their applicability.

The Spanish survey has had several aims:

- To build up a knowledge base about Spanish food consumers which the Danish food industry can use to obtain a better understanding of the market, and to which more product-specific surveys, product-concept tests, etc., can be related.



- To establish a comparative basis for similar surveys in other countries, so that both cross-national differences and potential cross-national segments can be identified.
- To provide a comparative basis for future surveys in Spain in order to identify future food consumer trends.

The aim of this report is to present the main results of the survey in a straightforward way. Few technical or methodological details are therefore included.

## **2. A MODEL OF FOOD-RELATED LIFESTYLE**

The main premise of food-related lifestyle is that people try to act in accordance with their basic life values. Food, like any other product, is a means by which food consumers can achieve the values that are important for them in their lives. Food consumers will be interested in buying and using food products to the extent that they mentally link their perception of these products to the achievement of life values. While these links will naturally be product-specific, there are also general, non-product-specific aspects of how people use food in their lives. These general aspects can be called food-related lifestyle. By involving these aspects, it is possible to describe how people fit the shopping, cooking and consumption of food into their everyday lives so as to achieve their basic values. It can be seen from figure 1 that food-related lifestyle consists of five aspects, covering the following dimensions:

### *Ways of shopping*

- How interested are food consumers in product information?
- Are they influenced by/do they like adverts?
- Do they like shopping?
- Do they shop in specialist shops?
- Are they price conscious?
- Do they use shopping lists?

### *Quality aspects*

- How important is healthiness?
- How important is the price/quality relation?
- How important is novelty?
- How important is taste?
- How important is freshness?

### *Cooking methods*

- How interested are food consumers in cooking?
- Do they seek innovation and challenge through cooking?
- Must cooking be quick and easy?
- Does the family help out in the kitchen?
- Are meals planned in advance?
- Is cooking regarded as the woman's job?

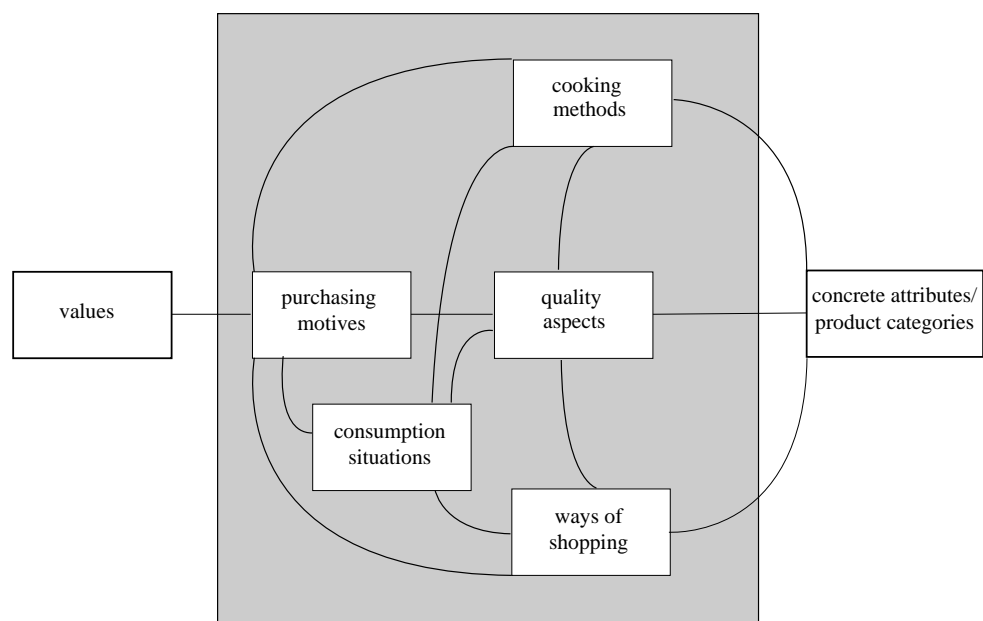
### *Consumption situations*

- Have snacks replaced fixed meals?
- Is it important to eat out and with other people?

### *Purchasing motives*

- How important is self-fulfilment and recognition through cooking?
- How important is security through traditional eating?
- How important is the role of food for sociality?

*Figure 1. A model of food-related lifestyle*



### **3. DATA COLLECTION**

Food-related lifestyle is measured by means of a questionnaire consisting of three statements for each of the above 23 dimensions, each of which is measured on a 7-point scale, where 1 stands for “completely disagree” and 7 for “completely agree”.

The questionnaire is based on a cross-cultural pilot test (Grunert, Brunsø & Bisp, 1993), and further validated on the basis of representative national samples (Brunso, Grunert & Bredahl, 1996). The questionnaire is available in English, French, German, Spanish and Danish versions.

Apart from the questions designed to measure food-related lifestyle, there were also questions about country of origin, an environment module, and a number of demographic questions.<sup>1</sup>

The data collection was carried out by a Spanish research agency in Spring, 1996. The interviews were carried out as face-to-face interviews with the person mainly responsible for shopping for food and cooking in a representative sample of 1000 Spanish households. The interviews took place in the respondent's home.

### **4. RESULTS**

Section 4.1 describes the general impression of the Spanish food consumers with regard to each of the five aspects of food-related lifestyle, based on the 23 dimensions. The dimensions are measured on a scale with values of 3-21, corresponding to the sum of the answers to the three related statements per dimension. The dimensions will also be related to each other.

Based on the questionnaire, five different segments of food-related lifestyle have been identified. These are described in section 4.2.

The results will be related to the demographic questions included in the questionnaire.

In the following, the percentages for the number who agree/disagree with a statement correspond to those who have answered 6/7 and 1/2 respectively.

#### **4.1 General impressions**

Diagram 1 shows the distribution of the Spanish food consumers on the 23 dimensions, while table 1 shows the relation between the dimensions and the demographic variables.

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<sup>1</sup> This report includes the results of the environment module. Those for country of origin will be published separately.

*Ways of shopping.* The most important aspects for Spanish food consumers when shopping for are price and product information.

Two thirds said that they always check the price before buying food. They particularly notice if something they often buy goes up or down, and a lot read the adverts for any special offers before they go shopping.

Product information is important for 75% of the food consumers, and is used in several ways. Some food consumers compare product information for different products before deciding which one they will buy, while others compare product information in order to find the most nutritious product.

Spanish food consumers don't have much confidence in product information from TV commercials and other printed media, and only a few actively use adverts to decide what to buy. They have somewhat more confidence in product information from friends and acquaintances, however. Thus, 22% say that they are influenced by what family and friends tell them about various food products.

There is no clear interest in shopping. About the same number say they like it a lot as say they don't, while for 15% of food consumers, daily shopping has become something of a sport.

There is no clear preference for specialist shops, either. 26% see no reason to shop there, while 34% like specialist shops because of the expert advice they can get there. Respondents' answers to these questions can be somewhat misleading, however, since the distinction between supermarkets and specialist shops isn't always relevant in the Spanish market, where a lot of people shop in proper markets.

Spanish food consumers are also divided over the question of planning shopping. A lot use shopping lists, but many only first decide what to buy at the point of purchase (27%).

*Relation to demographic variables.* Product information is used more often by people from low-income households and by people with at least some education. The elderly and the unemployed are more positive about adverts, while people in Madrid like shopping less. Price consciousness increases with household size, educational level and town size, but decreases with household income. Finally, a significantly higher number of full-time employees and the well-educated use shopping lists.

*Quality aspects.* Quality aspects are especially important for Spanish food consumers, in particular the price/quality relation and products' freshness and health value.

85% attach a lot of importance to the price/quality relation. This is, of course, connected with the general level of price consciousness, and reflects the fact that Spanish food consumers want as much quality for their money as possible.

Spanish food consumers prefer fresh to tinned food, and prefer to buy it in loose weight. The great majority also prefer natural products and products without preservatives. While only slightly more than half try to buy products without

any additives whatsoever, there is no doubt that “naturalness” is an important quality aspect of food.

There is little interest in new products. Only one third of the Spanish food consumers say that they like trying new food products.

There is a relatively large interest in ecological products, on the other hand, 42% saying that they would always buy ecological products if they were available. A third are also willing to pay more for ecological products. However, there is a slight problem with the definition of ecological products in Spain, since there are still very few in the shops. It cannot be ruled out, therefore, that ecological is interpreted as a category of “natural” foods, which aren’t necessarily ecological in the sense that we use the term.

Taste is another important quality aspect. Thus, 90% say that good taste is decisive – though, at the same time, half concede that nutritiousness is more important than taste.

*Relation to demographic variables.* Interest in healthy food increases with the level of education, and is higher in Madrid than in the other regions. The price/quality relation has the most importance among lower income groups and, with the exception of Barcelona, in the big cities. The interest for new products is inversely proportional with age, but rises with the level of education and size of towns, except for Madrid. The importance of taste falls with educational level, and the importance of freshness decreases with rising household income.

*Cooking methods.* Spanish food consumers are not especially interested in cooking. One third say that cooking is just something to get over and done with. While a majority like to have good time in the kitchen, this says perhaps more about wanting to avoid stress than liking cooking.

Despite the lack of interest in cooking, only few food consumers use ready-cooked meals or various “instant” products, and under 10% often use frozen products in cooking.

The Spanish food consumers fall into two groups as regards general innovation in cooking. Many like to try new recipes, while a lot don’t want new inspiration. The same applies to planning meals: a quarter plan the family’s meals a couple of days in advance, while one third decide more spontaneously.

Most think that the woman is responsible for the family’s nutrition, but a majority (61%) also feel that the man should do his share of shopping and cooking. Only a quarter think that the kitchen is basically the woman’s responsibility. In actual fact, there are just as many homes where the whole family helps out in the kitchen and with other related tasks than there are homes where it is the woman’s job alone.

*Relation to demographic variables.* There are regional differences in practically all the cooking dimensions. Food consumers in Madrid and eastern and north central Spain are the most interested in cooking. Food consumers in Madrid in particular are neither interested in quick and easy cooking nor innovation in cooking. These food consumers, like those of several other regions, also think

that cooking is the woman's job. Food consumers in Barcelona have the opposite opinion to food consumers in Madrid on all dimensions except whether cooking should be quick and easy. Other significant demographic relations are that interest in new cooking methods and quick and easy cooking rises with the level of education, but falls with age. Planning increases with age, and the view that cooking is the woman's job is also more widely held among the elderly and among food consumers with no education.

*Consumption situations.* In general, Spanish food consumers stick to fixed meals. Only 9% say that snacks have almost replaced fixed meals, and only few eat between meals.

Under 10% eat regularly at a restaurant, despite the fact that all of 34% don't consider it a luxury to take the family out to eat.

A quarter of the population often eat together with friends, while nearly 40% mostly eat alone with the family.

*Relation to demographic variables.* Again, there are marked regional differences. Food consumers in the north east, east, Madrid and Barcelona keep the most to fixed meals, while food consumers in the north west especially are not so fussy. Younger food consumers and food consumers in small households attach more importance to eating out and together with others. The same applies to food consumers in Barcelona, Andalusia, and north west and eastern Spain.

*Purchasing motives.* All three purchasing motives included in food-related lifestyle are very important for Spanish food consumers. These are self-fulfilment and recognition through cooking, security through traditional eating, and the role of food for sociality.

A large majority (almost 70%) say that being complimented on their cooking means a lot for their self-confidence and that cooking is a form of self-fulfilment for them. Less than 30% regard themselves as good cooks, however.

A majority also say that food gives them a sense of security. Nearly 70% only buy and eat food they are familiar with, and 43% are directly opposed to anything that is likely to change their eating habits.

Finally, most agree that the dinner table is a good place to be together with friends and acquaintances. A majority say that when they have friends around for a meal, the social aspect is more important than the actual food, and many say that these meals are an important part of their lives.

*Relation to demographic variables.* Food as a source of social recognition, self-fulfilment and security is most widespread among food consumers without an education. The importance of the security aspect increases with age. On the other hand, the importance of food for sociality falls with age, but increases with the level of education, and is regarded as the most important by people in full-time jobs.

*Mutual correlation of the dimensions.* The 23 dimensions are also mutually related, of course. Food consumers who think that product information is

important shop more in specialist shops and are more price conscious. And the more interested they are in these aspects, the more they buy healthy and ecological products, and the more importance they attach to the general price/quality relation. Food consumers who prefer healthy food products also appear to be less inclined to think that cooking should be quick and easy. And in general, the more food consumers like shopping, the more they like cooking. Food consumers who like to try new products also like to try new cooking methods.

Self-fulfilment and social recognition through food are strongly and positively connected with the general interest in cooking, and food consumers who regard these as important are also more interested in healthy products with an optimal price/quality relation. Food consumers who want security through food are less willing to try new products and recipes, and tend more to think that cooking is the woman's job. Finally, food consumers who attach a lot of importance to the social role of food are also more likely to eat relatively often with friends or at restaurants, and are more willing to try new products and recipes.

*Spanish food consumers compared with food consumers in other European countries.* MAPP has also carried out food-related lifestyle surveys in Germany, Great Britain, France and Denmark. Compared with the food consumers in these countries, Spanish food consumers are generally more interested in food, but at the same time are more conservative in their choice of products and in their relationship to food.

Spanish food consumers are more interested in product information and shop in specialist shops more often than the average German, English, French and Danish food consumers. As regards the quality aspect, Spanish food consumers are more interested in products' health qualities and the price/quality relation than food consumers in the other countries. They are as little interested in new products as French food consumers. Spanish food consumers are less interested in the convenience of using ready-cooked meals or frozen food in cooking than food consumers in the other countries. They do not differ markedly as regards consumption situations, but their purchasing motives are higher than the average in the other four countries, especially as regards security through traditional eating, but also self-fulfilment and recognition through cooking.

## 4.2 The segments

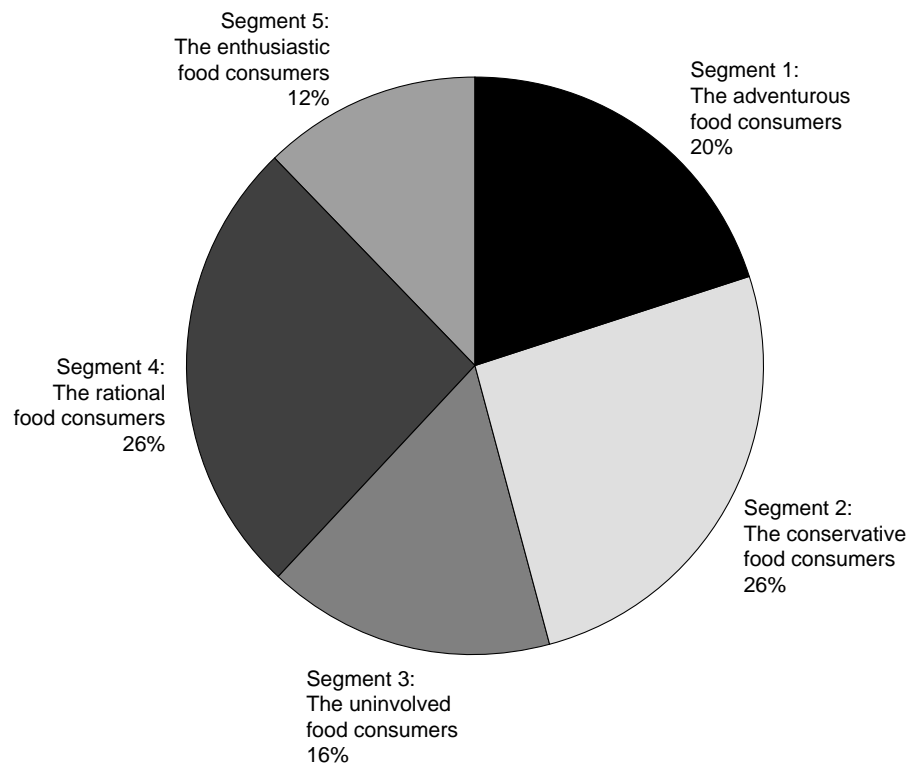
The general description of the Spanish food consumers is based on average estimates. These conceal several different food-related lifestyles, however. By means of a segmentation analysis, we have divided the Spanish population into five basic segments (groups), each with their own distinctive food-related lifestyle.<sup>2</sup>

The segments are described below, based on their relation to the population as a whole. The segments are illustrated in diagram 2, while the relation to the demographic variables is shown in table 2.

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<sup>2</sup> The segmentation was carried out by means of a hierarchical cluster analysis, using Ward's method. Analysis variance shows that the segments differ significantly on all 23 dimensions of the food-related lifestyle.

Figure 2. Relative size of the segments



*Segment 1. The adventurous food consumers, 20% of the population*

*Ways of shopping.* The food consumers in this segment like shopping the most. They also plan shopping more than any other segment, but don't use adverts much to decide what to buy. Price is somewhat more important for them than the population as a whole, while product information in the form of declaration of contents, etc., has the same importance. The adventurous food consumers use specialist shops a bit less than the average.

*Quality aspects.* No other food consumers attach as much importance to the novelty aspect as the food consumers in this segment. These food consumers also attach more importance to the price/quality relation and freshness than the population as a whole. Taste and ecology are less important, while health aspects are just as important as for the rest of the population.

*Cooking methods.* This segment is also more interested in cooking than most other segments, which is reflected in the way the adventurous food consumers prepare their food: this segment is the one which most often uses new recipes and in which the whole family most often helps out in the kitchen. Cooking is hardly regarded as the woman's job at all, it is planned less than average, and these food consumers use fewer ready-cooked meals and other convenience products.

*Consumption situations.* The adventurous food consumers stick to fixed meals more than the other segments, and they eat out or together with friends more than average.



*Purchasing motives.* The social aspect is a particularly important purchasing motive for these food consumers, who score high in this dimension. A feeling of security is less important, while self-fulfilment and recognition are just as important as for the rest of the population.

This segment thus consists of highly interested food consumers who like both shopping and cooking, and who are always looking for challenges in new products and recipes. The social role of food is very important for them: the whole family helps out in the kitchen, and meals are largely social events.

The adventurous food consumers come especially from the younger part of the population, half being under 35. More of these food consumers have children still living at home, and household size is somewhat above average for the population as a whole. The adventurous food consumers are also the most well-educated and most employed food consumers, and thus also have the highest incomes. A higher proportion of these food consumers live in cities of over 300,000 inhabitants than in the other segments. The segment does not differ markedly in the other demographic variables.

From a marketing point of view, this is a particularly attractive segment. These food consumers have a high purchasing power and a strong willingness to buy, they are very interested in new products, and also constitute a large part of the population. Marketing efforts should focus on the adventurous food consumers demanding products that can be used in a creative way together with the family.

#### *Segment 2. The conservative food consumers, 26% of the population*

*Ways of shopping.* These food consumers are less interested in all aspects of shopping than the population as a whole. In particular, they plan shopping much less than average, and are the least interested in product information.

*Quality aspects.* Conservative food consumers are also less interested in most product-related dimensions than average. Only taste and freshness interest them a bit more. This segment is the least interested in new products and ecological/natural products.

*Cooking methods.* Of all the segments, conservative food consumers avoid new recipes the most, regard cooking as the woman's job the most, and the family help out in the kitchen the least. These food consumers have an average interest in cooking, but, like the adventurous food consumers, plan meals a bit less than the population as a whole, and they use fewer ready-cooked meals and other convenience products than the population as a whole.

*Consumption situations.* These food consumers eat more often at home than any other segment, and keep to fixed meals more than the average.

*Purchasing motives.* A feeling of security is more important for this segment than for the population as a whole. Sociality is the least important of all segments, while self-fulfilment and social recognition have the same importance as for the population in general.

Security through food is important for these food consumers. Thus, conservative food consumers only buy traditional products which they also cook in traditional ways. The woman does the cooking, and they eat at home and at the same time every day. Apart from this, these food consumers are not particularly interested in either shopping or cooking.

This segment has the highest average age of all the segments, and on average households are smaller and children still living at home rare. These food consumers are also the most poorly educated, with almost 40% having little or no schooling. Housewives make up almost three quarters of the segment, while the rest are more or less all pensioners. The segment has the lowest household incomes and live more than any other segment in rural areas.

Of the five Spanish segments, this is the least interesting from a marketing point of view, partly because the conservative food consumers are so unreceptive to new products and partly because they have such a low purchasing power.

### *Segment 3. The uninvolved food consumers, 16% of the population*

*Ways of shopping.* The uninvolved food consumers are the least interested in shopping of all the segments. None of the other segments dislike shopping so much, use specialist shops so little, attach so little importance to product information, or plan shopping less than these food consumers. They are also less interested in adverts and product information than the population as a whole.

*Quality aspects.* Again, none of the other segments attach so little importance to healthiness, the price/quality relation, and freshness as this segment. They are also less interested in ecological/natural products and taste than any other segment. The only thing they are more interested in than the average is the novelty aspect.

*Cooking methods.* The uninvolved like cooking the least of all the segments. They spend less time on finding new recipes, use more ready-cooked meals, and plan meals less than the average. Cooking is not solely regarded as the woman's job, and the rest of the family help out in the kitchen more often than on average in the population.

*Consumption situations.* These food consumers attach less importance to fixed meals than average, while attitudes to eating out or with others do not differ markedly from other segments.

*Purchasing motives.* Self-fulfilment, recognition, and security through food mean less for this segment than for any of the others. The social aspect also means less than for the average.

The uninvolved food consumers are interested neither in shopping, cooking, nor in the quality of the food they eat, and food is not important in their lives. The most important criterion for these food consumers is that food should be easy to cook.

Demographically, this segment is not as clearly defined as the adventurous and conservative food consumers. However, they have a lower than average age, somewhat more of them have jobs – both full and part-time – and household incomes are a bit higher. Geographically, there is a preponderance of uninvolved food consumers in Barcelona and the north central region of Spain.

This will be a big market for ready-cooked meals and snacks. Their low price sensitivity makes them attractive for manufacturers of this type of product, but since the uninvolved are also totally uninterested in food products, they are hardly likely to show much brand loyalty.

#### *Segment 4. The rational food consumers, 26% of the population*

*Ways of shopping.* The rational food consumers like shopping more than the average. They are also more interested in price and more influenced by adverts than the average, but plan shopping less. They have a more positive attitude to specialist shops, and are more price conscious than the population as a whole.

*Quality aspects.* Quality aspects are also important for these food consumers. They are more interested in both healthiness, the price/quality relation, taste, new products, and ecological/naturalness than the average. Freshness has the same importance as for the population in general.

*Cooking methods.* These food consumers are less interested in cooking than the average, and thus set great store by quick and easy cooking. They are more willing to use new cooking methods than average, and the whole family helps out in the kitchen more often – though cooking is regarded as the woman's job to a slightly larger extent than for the population as a whole. Meals are planned a bit more than average.

*Consumption situations.* The rational food consumers eat the most snacks and eat out and together with others the most.

*Purchasing motives.* Self-fulfilment, recognition, security and sociality through food are more important for this segment than for the population as a whole. These food consumers attach particular importance to the social role of food.

Thus, this segment consists of interested food consumers who are price conscious and read product information, and who generally attach a lot of importance to quality. While they have a very pragmatic-relaxed attitude to cooking and eating, they also attach some importance to the social process.

Half these food consumers are in the 36-55 age bracket. More than the average are nuclear families, and, together with the adventurous food consumers, they have the highest average household size. Rational food consumers have more schooling than the average, and more than the average have median incomes. There are more housewives than in general, and a striking number of these food consumers live in the north west of Spain and in Andalusia.

From a marketing point of view, this segment, like the uninvolved food consumers, would clearly be a good market for various convenience products. The difference is, however, that here, the products would also have to fulfil a lot of quality requirements, the price must reflect the quality, and, as long as it doesn't make cooking more difficult, they may require new cooking methods. Rational food consumers have a very positive attitude to adverts, so this would be a good way of marketing these products in this segment.

*Segment 5. The enthusiastic food consumers, 12% of the population*

*Ways of shopping.* These food consumers like shopping more than the average, and they attach more importance to product information and price than any other segment. They plan shopping a lot more, and have the most positive attitude to specialist shops. They are the least interested in adverts of all the segments.

*Quality aspects.* The enthusiastic food consumers are also especially interested in quality aspects, and they include healthiness, the price/quality relation, ecology and freshness in their purchasing decisions more than any other segment. They have an average interest in taste, but are a bit less interested in new products.

*Cooking methods.* These food consumers are the most interested in cooking. They plan meals more than any other segment, and also attach the least importance to easy cooking. While they regard cooking as the woman's responsibility a bit more than average, the family also helps out in the kitchen more than average. These food consumers also employ more new cooking methods than the population as a whole.

*Consumption situations.* This segment eats snacks the least, and eats out and with others a bit less than average.

*Purchasing motives.* The enthusiastic food consumers have stronger purchasing motives than any other segment. Self-fulfilment and recognition, security, and the social aspect are all important purchasing motives. In absolute terms, the purchasing motives are equally important.

None are as interested in food as these food consumers. Their strong purchasing motives are reflected in the fact that they put a lot of energy into both shopping and cooking, which are both carefully planned. They make a point of buying natural, high-quality products, but are also price conscious.

Demographically, it is hard to pin down the enthusiastic food consumers. They have a slightly higher average age than the population as a whole, and this segment has the most food consumers in the highest income bracket. Geographically, these food consumers are underrepresented in Andalusia, but are otherwise evenly spread over the whole country.

In order to satisfy these food consumers, a food producer would have to meet a lot of requirements, both as regards product quality, product information, and the possible uses of the product. Naturalness and healthiness would be necessary ingredients in any efforts to market a product in this segment, and, unlike

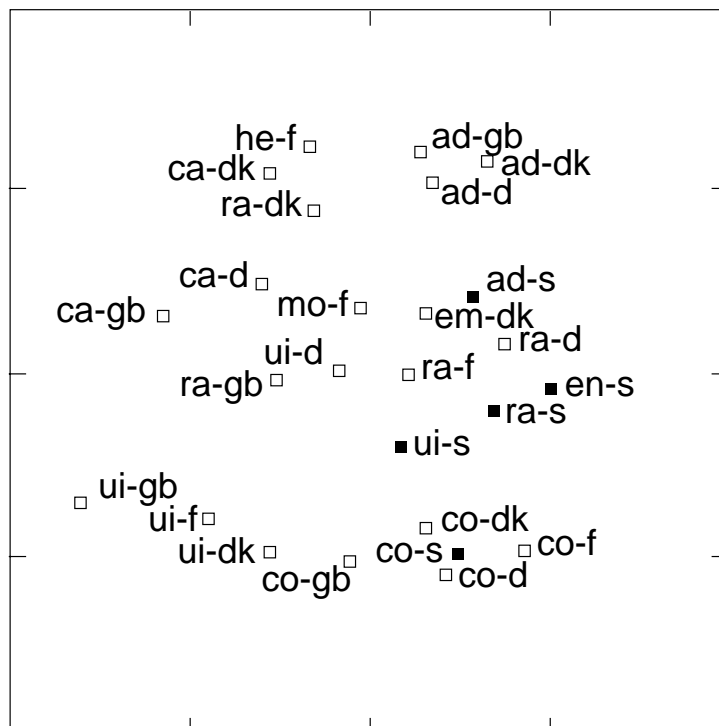
in the rational and uninvolved segments, any hint of convenience in the form of simplified cooking methods would go down particularly badly with these food consumers. However, if these requirements and expectations can be fulfilled, the enthusiastic food consumers are likely to prove extremely loyal.

*The Spanish segments compared with segments in other European countries.* Segmentation analyses have also been carried out in the food-related lifestyle surveys in France, Germany, Great Britain and Denmark.

Each of these four countries also have uninvolved, rational and conservative food consumers, while three have adventurous segments. In addition, Germany, Great Britain and Denmark have careless food consumers, while segments of hedonistic and moderate food consumers have been identified in France. Finally, a segment of eco-moderate food consumers was identified in Denmark.

Figure 3 shows the relative position of the segments according to their similarities and differences in the 23 dimensions. The first part of the designation refers to the segment name, while the second part refers to the country (i.e. dk=Denmark, gb=Great Britain, d=Germany, f=France, and s=Spain).

*Figure 3. The Spanish segments compared with segments in other European countries*



The closer the segments are to each other in the figure, the more they resemble each other in the 23 dimensions. The two axes cannot be interpreted directly, but it seems clear that the further to the right (the x axis), the greater the involvement in food, and the further up (the y axis), the greater the willingness to experiment.

The figure shows clear tendencies towards cross-national segments, ie segments that cross national boundaries. For example, the adventurous food consumers in Denmark, Great Britain, and Germany are close together, as are the conservative food consumers in Denmark, France, Germany, Spain, and, to some extent, Great Britain.

In addition, all the Spanish segments are relatively close together, which shows that Spanish food consumers constitute a more homogeneous group than food consumers in the other four countries. The Spanish segments are all on the “involved” side of the diagram, while they have different positions on the y axis. The adventurous food consumers are highest up, reflecting their greater willingness to experiment, while the conservative are placed at the other end, reflecting the fact that they are the least receptive to changes in their food consumption.

## **5. THE ENVIRONMENT MODULE**

This section presents the main results of the questions included in the environment module. This module measures attitudes and behaviour in connection with environmental and ethical aspects that can influence which food product a consumer chooses.

The environment module is thus a supplement to the dimensions under the quality aspects in the food-related lifestyle instrument, and, to some extent, can be regarded as an amplification of the ecology/naturalness dimension.

The environment module was developed through pilot tests in two European countries, and covers four dimensions:

- animal welfare
- genetic engineering
- ecology
- political considerations

Each dimension consists of four statements<sup>3</sup>, measured on the same scale as those of food-related lifestyle, ie, a 7-point scale, where 1 corresponds to “completely disagree” and 7 to “completely agree”. Thus, the values of the dimensions can vary from 4 to 28.

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<sup>3</sup> Originally, each dimension consisted of 7-8 statements. The reduction to the present 4 was done using a factor analysis based on the data collected in the pilot test.

The results are presented for the Spanish population as a whole and in relation to the dimensions of food-related lifestyle and the lifestyle segments. While the description takes a starting point in the four dimensions, the individual statements will also be included where relevant. As before, answers 1 and 2 will be combined to “disagree” and 6 and 7 to “agree”.

Diagram 3 shows the frequency distribution for the four dimensions. The relation between the dimensions in the environment module and the lifestyle segments is shown in diagram 4.

*Animal welfare.* Animal welfare is the one dimension in the environment module that concerns the Spanish population the most. Just over half of the Spanish food consumers say that they prefer meat produced under conditions which take animals' welfare into consideration. Thus, they prefer free-range eggs and meat from free-range pigs rather than intensively produced eggs and pork. Only 37% say that considerations about animal welfare enter directly into their purchasing decisions, however.

*Genetic engineering.* 45% of food consumers say that they would not eat genetically modified food. Somewhat more think that genetic engineering is unethical and therefore unacceptable in food. The great majority (80%) think that genetically modified food should be labelled. Only about one third of the food consumers directly boycott genetically engineered food products, which is probably because so few are currently available, most of which are fruit and vegetables. This can also partly explain why one fourth haven't answered the question.

*Ecology.* The population is also concerned about the ecological dimension, though to a lesser extent than the two previous dimensions. 45% of food consumers say that they try to buy ecological products, and for one third of the food consumers, family welfare is an important reason for buying ecological products. 16% say that they are willing to pay up to twice as much for ecological products. However, only 25% say that they regularly buy ecological products, which can be due to lack of availability.

*Political considerations.* Political considerations only has a minor influence on Spanish food consumers' purchasing decisions. 63% say they don't care which country the products come from, all they are concerned about is quality. Political considerations are only important for under 10% of the food consumers. A majority think that it is wrong to boycott food products from other countries for purely political reasons, and only 18% have boycotted French products because of the French nuclear tests in the Pacific earlier this year.

*Mutual correlation of the dimensions.* The four dimensions are internally related to each other. Food consumers who are interested in ecological products are also more concerned about animal welfare and, albeit to a lesser extent, about the use of genetic engineering in food products. Political considerations are more or less unrelated to the other three dimensions.

*Relation with the food-related lifestyle dimensions.* The dimensions in the environment module are related to several of the food-related lifestyle dimensions.

As regards the shopping aspect, there is a positive relation between the dimensions in the environment module and the general interest in product information and specialist shops. There is no significant connection between these lifestyle dimensions and political considerations, however.

The most significant relation is to the dimensions under the quality aspect. The dimensions for ecology/naturalness, healthiness, freshness, and the price/quality relation, in that order, are closely related in a positive direction to the first three dimensions in the environment module. In other words, food consumers who prefer healthy and fresh products are also likely to prefer ethical and ecological products, and products not genetically engineered. The political dimension is negatively related to the price/quality dimension, i.e. the more food consumers include political considerations in their purchasing decisions, the less they try to optimise the price/quality relation.

With regard to cooking methods, one of the only relations is that food consumers who are interested in new recipes and products will also have more positive attitudes to ecological products and products produced with due care for animal welfare, and will, to a greater extent, avoid buying genetically engineered products.

There is no relation between consumption situations and the dimensions in the environment module.

Purchasing motives have some influence on the importance of the dimensions in the environment module. The tendency is that, the more important the three purchasing motives are, the more food consumers prefer ecological and ethical products and products not genetically engineered. At the same time, there is a negative relation between political considerations and the strength of the purchasing motives.

*Relation with the lifestyle segments.* The enthusiastic food consumers are most concerned about ecology, animal ethics and genetic engineering in connection with food products. The rational food consumers are also more interested in these aspects than the average, while the adventurous food consumers are around the average. The conservative and uninvolved food consumers, on the other hand, are not interested in either ecological or ethical products, and don't care whether the food has been genetically engineered or not.

The differences between the segments are less as regards the political dimension. The uninvolved food consumers include political considerations in their purchasing decisions the most, while the other segments lie more or less around the average.

## **6. CONCLUSIONS**

The food-related lifestyle survey in Spain shows that the price/quality relation and freshness are the most important purchasing criteria for Spanish food consumers.



If the segments of involved food consumers are combined, 84% of the Spanish population is interested in food and regard food as an important means of fulfilling basic life values. This in itself puts heavy demands on food manufacturers and those responsible for marketing food in the Spanish market.

The group of involved food consumers is made up of consumers with widely different purchasing motives, however, which means that manufacturers cannot satisfy all these food consumers with the same products. It also means that different marketing strategies will be needed.

The adventurous food consumers attach a lot of importance to the social aspect, and are best served by new products which can be used in creative and untraditional ways together with the whole family.

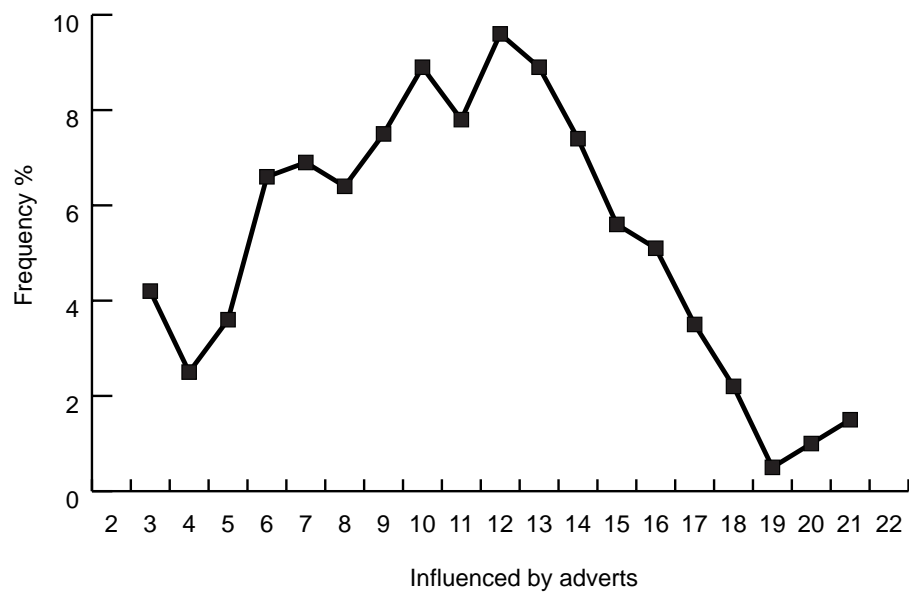
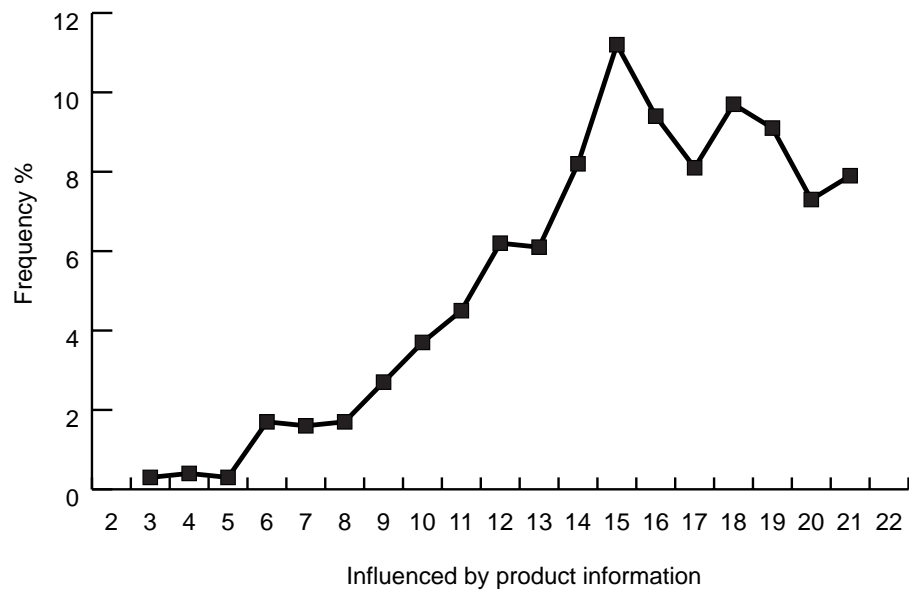
The conservative, rational, and enthusiastic food consumers, on the other hand, are more interested in security, and are therefore all best served by products based on more familiar Spanish food traditions. But this is where the similarities end. While quality doesn't interest conservative food consumers much, it is extremely important for both the rational and enthusiastic food consumers. The difference between the two latter is mainly one of degree (the enthusiastic being the most interested), but also that the rational attach a lot of importance to easy cooking and products and meals that can be eaten as light snacks, particularly in the company of friends and acquaintances.

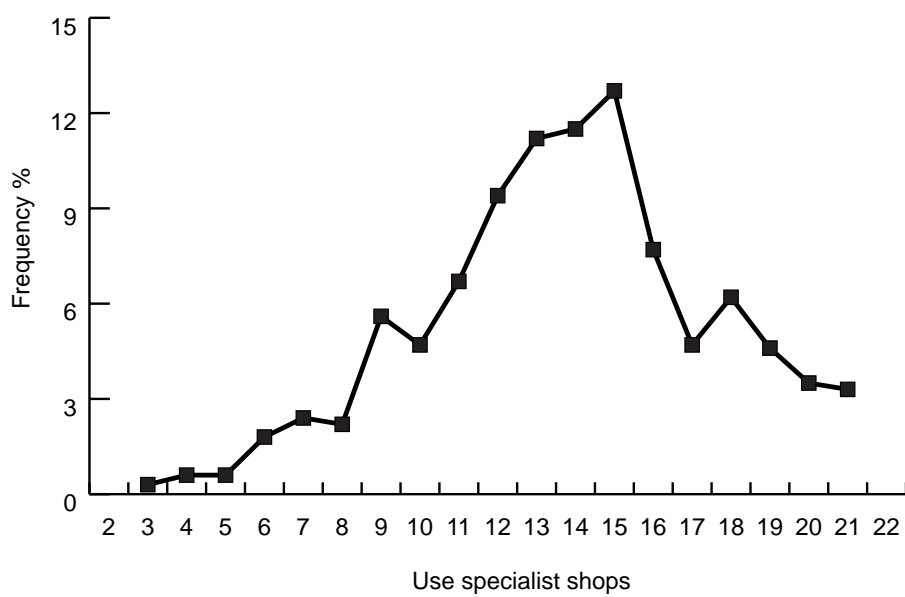
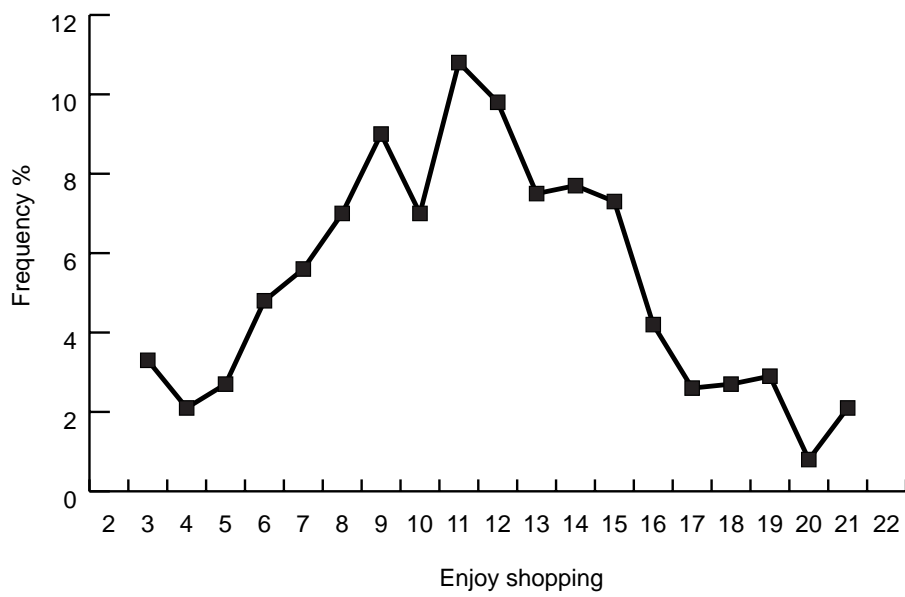
The 16% uninvolved food consumers are the only food consumers in Spain who are completely uninterested in food. It is not important in their lives, and is regarded solely as something to satisfy their physiological needs. These food consumers also have very low incomes, which makes it even more difficult to serve this segment. A slight possibility is to capitalise on the segment's interest for products that are easy to cook.

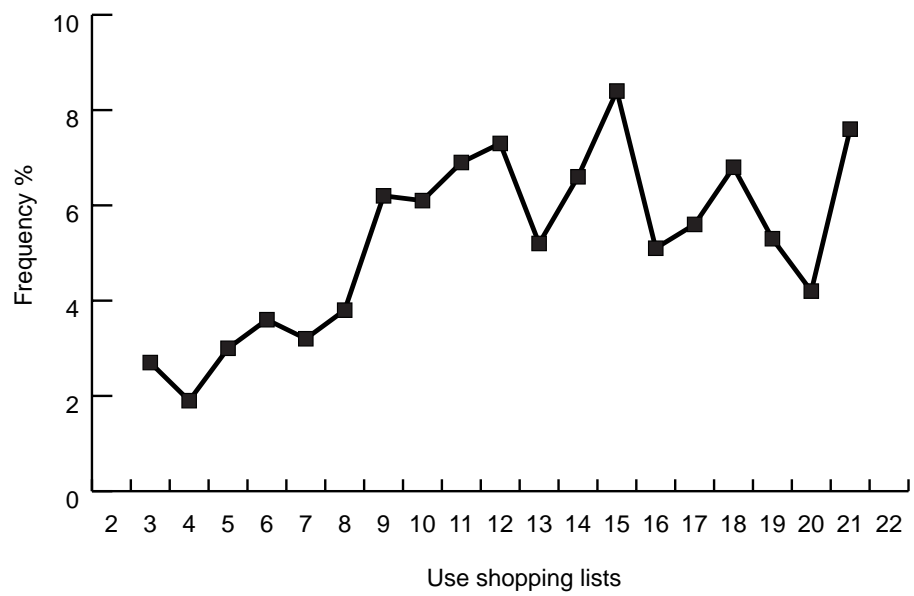
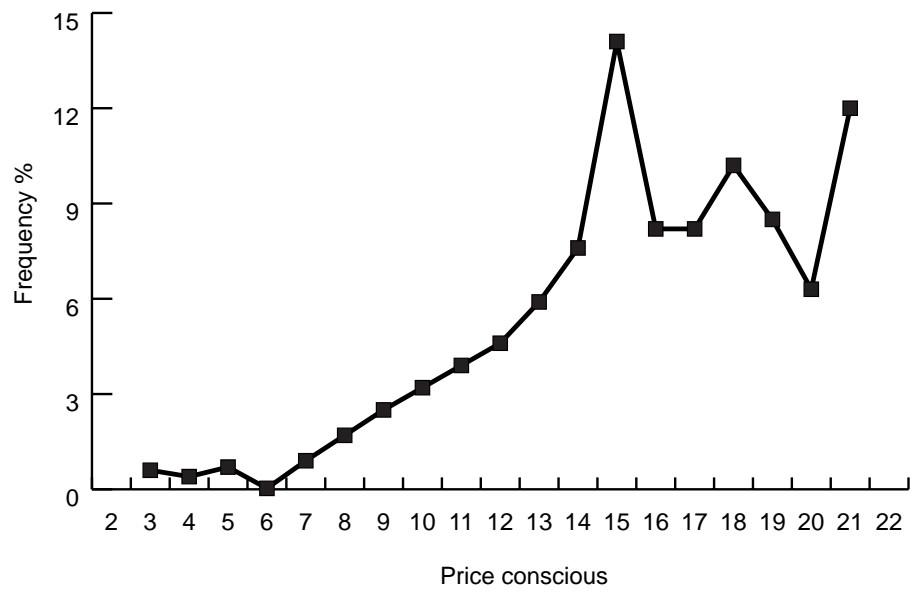
**DIAGRAM 1. FREQUENCY DISTRIBUTION OF THE SPANISH CONSUMERS ON THE 23 DIMENSIONS OF FOOD-RELATED LIFESTYLE**

All dimensions are measured on scales with a maximum of 21 and a minimum of 3 points. The higher the score the more important the dimension to the consumer in question. Eg, the diagram below shows that the higher the score, the more the consumer is influenced by product information.

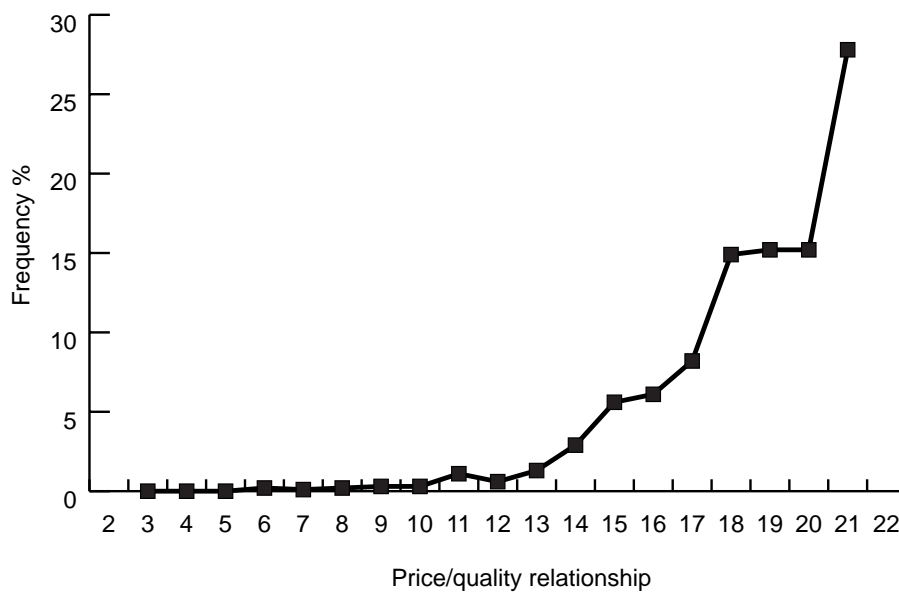
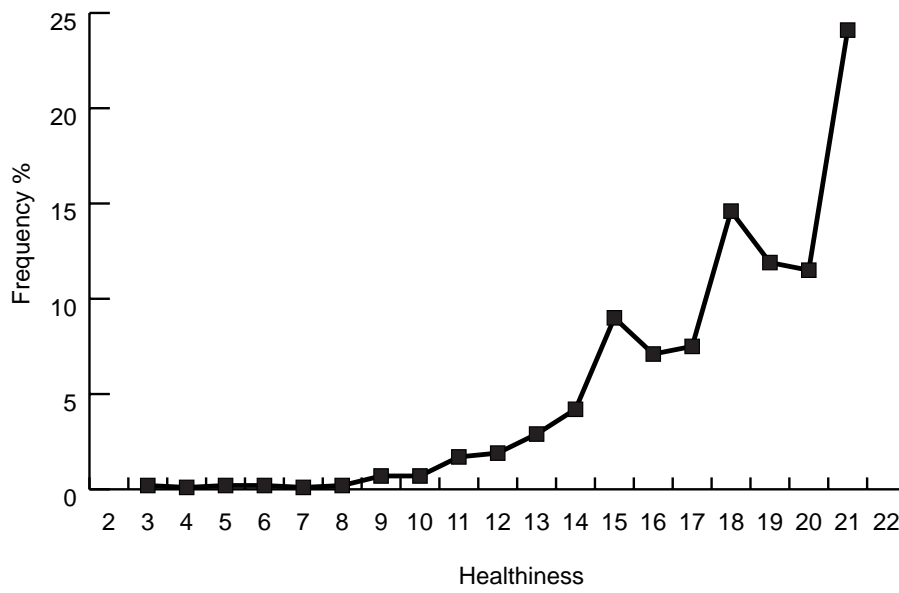
**Ways of shopping**

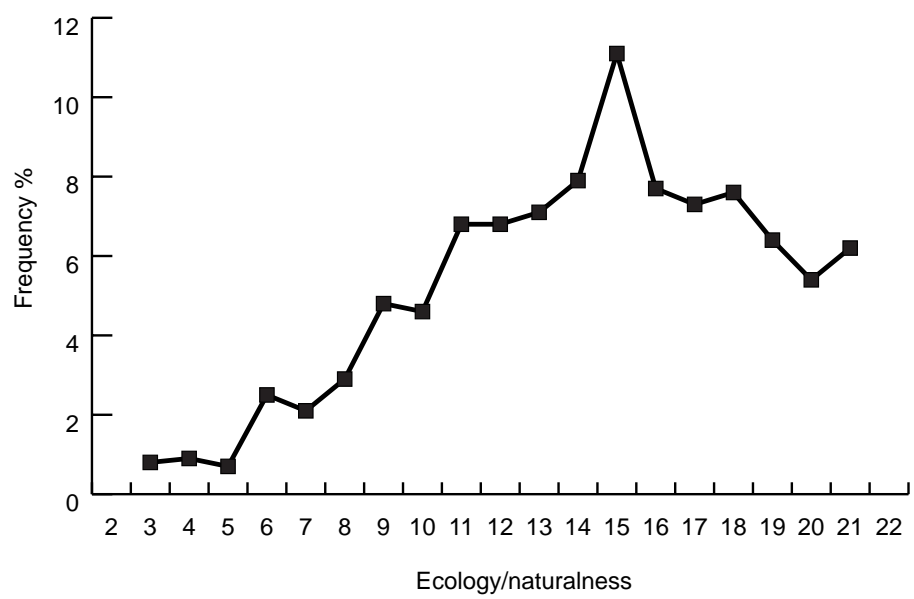
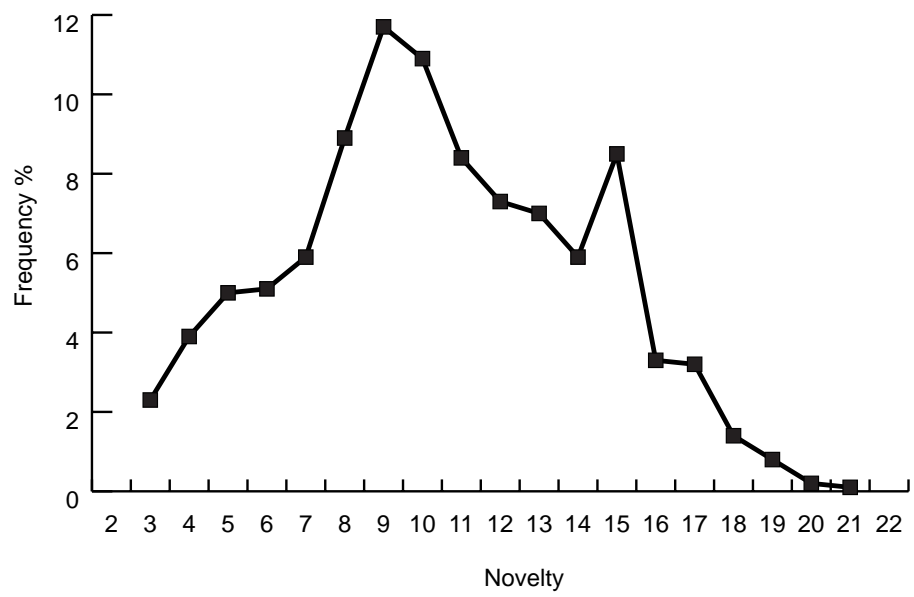


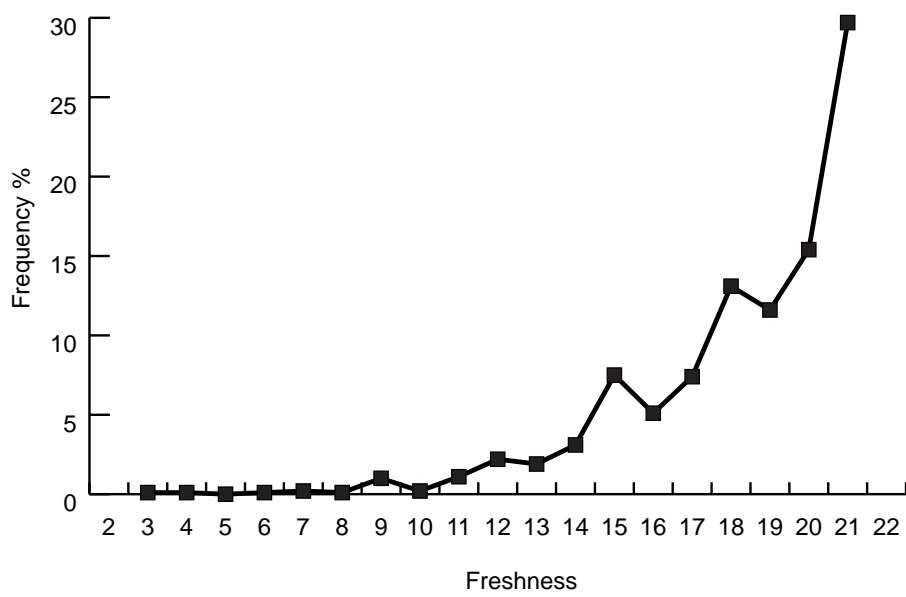
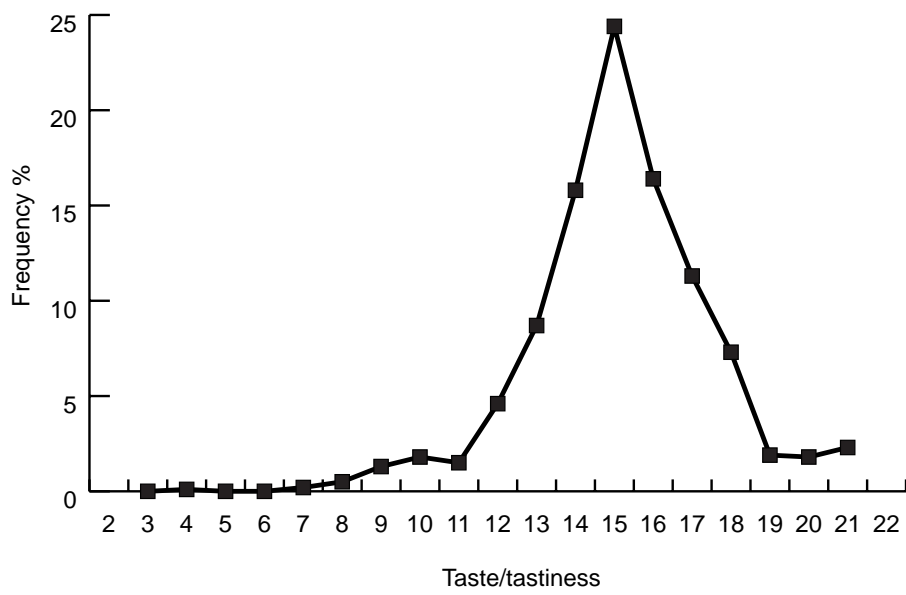




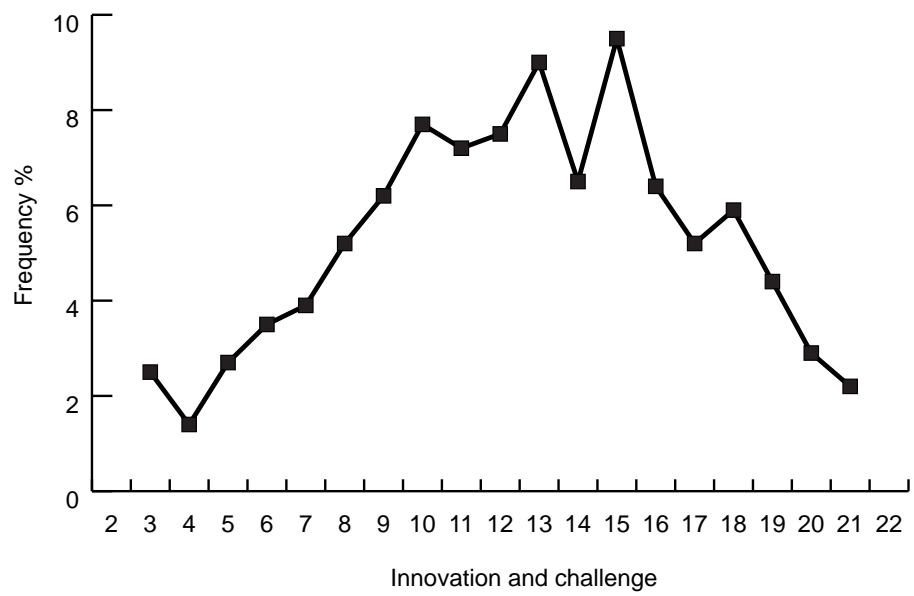
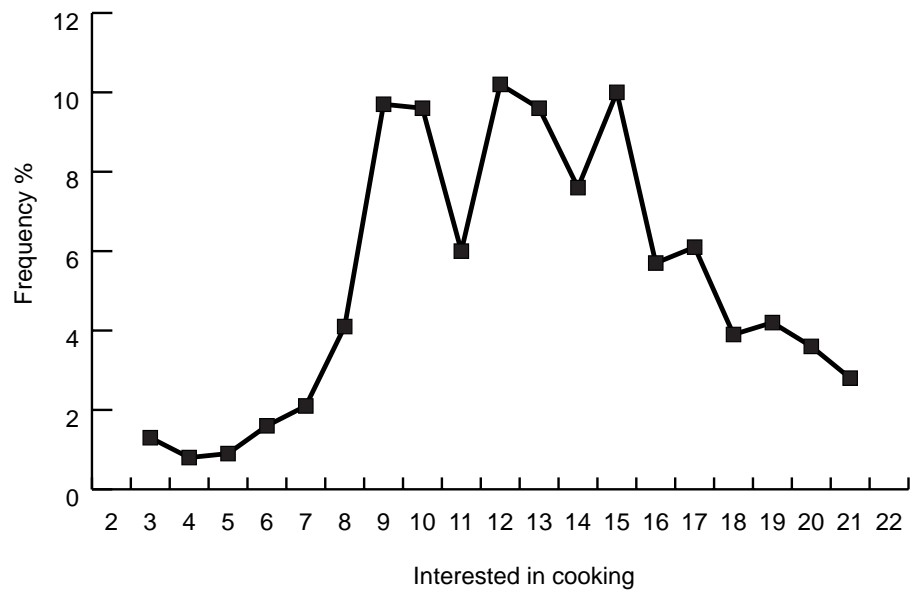
### Quality aspects



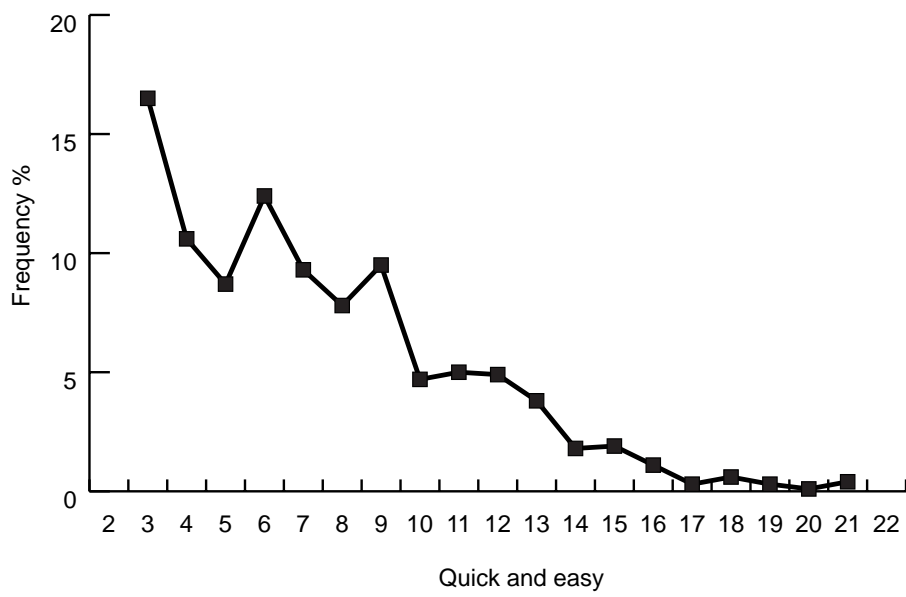


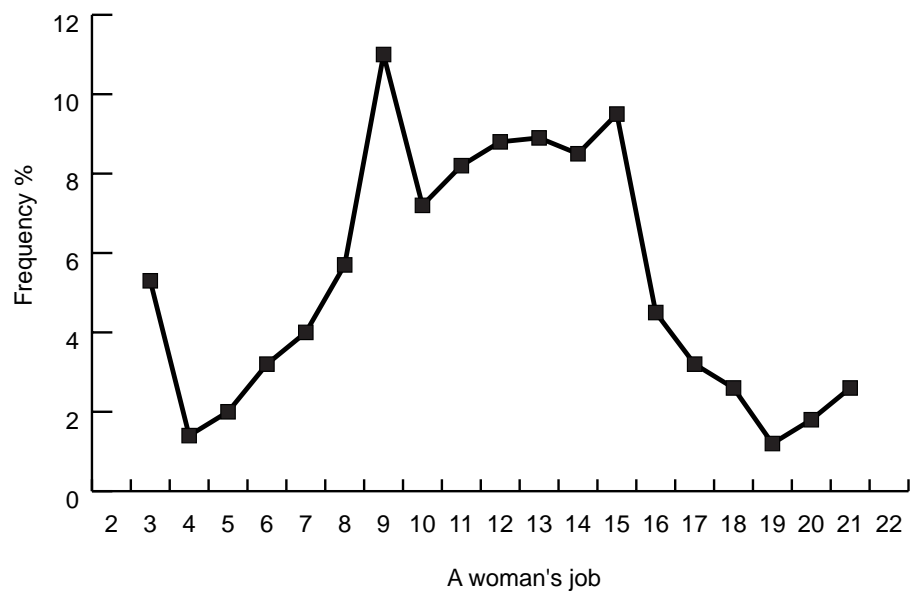
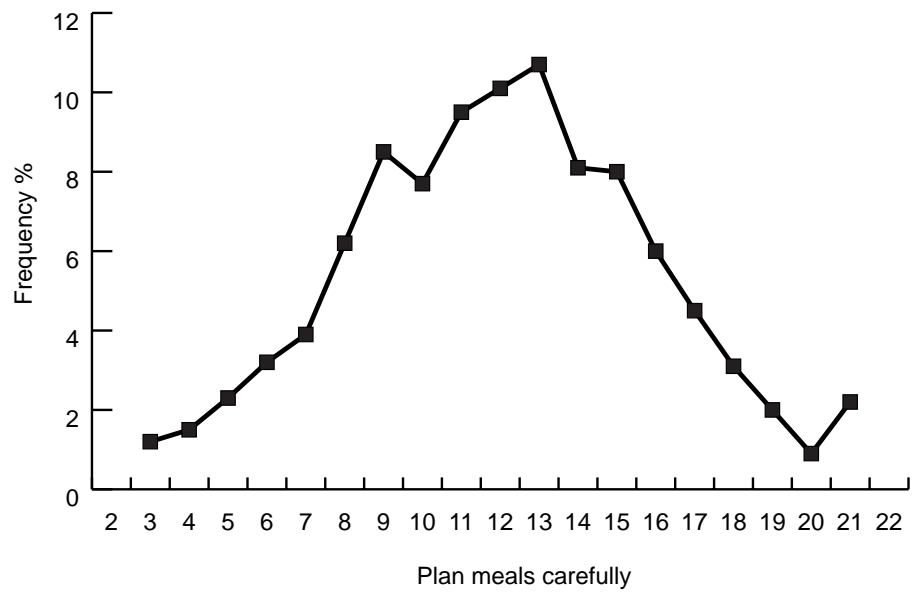


### Cooking methods

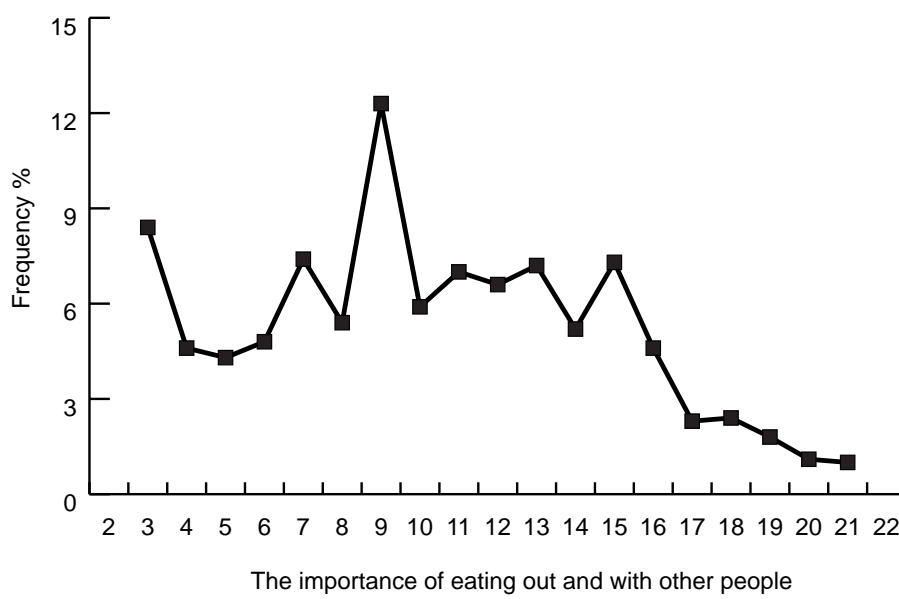
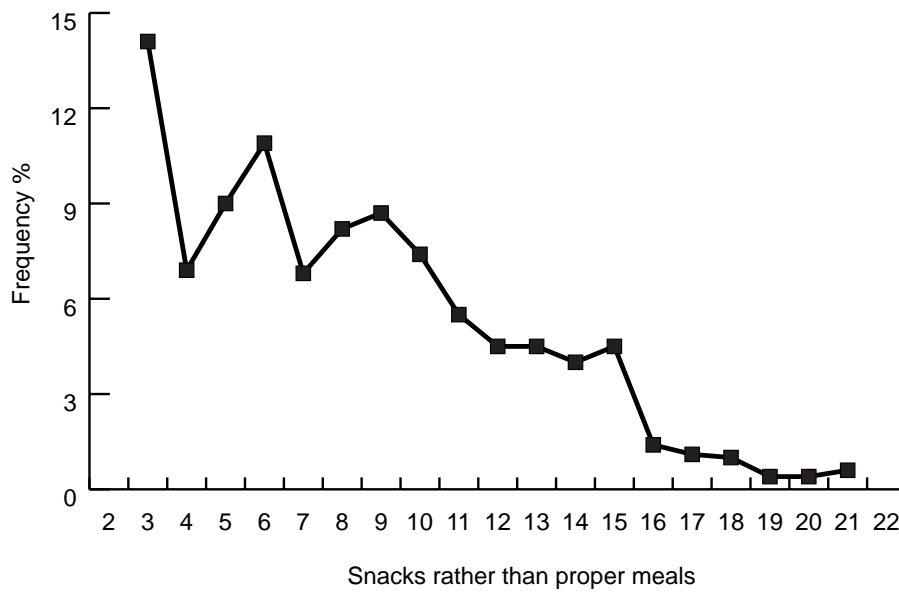




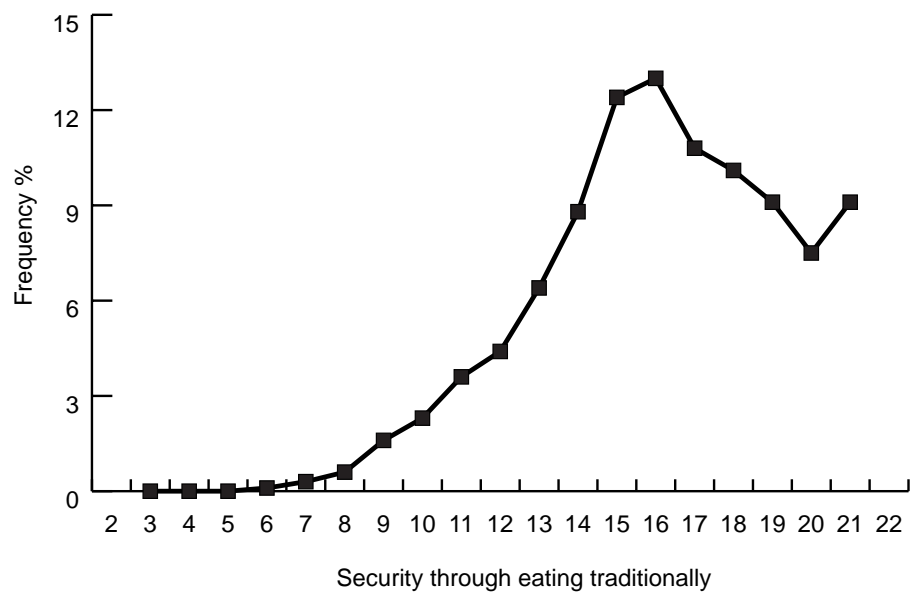
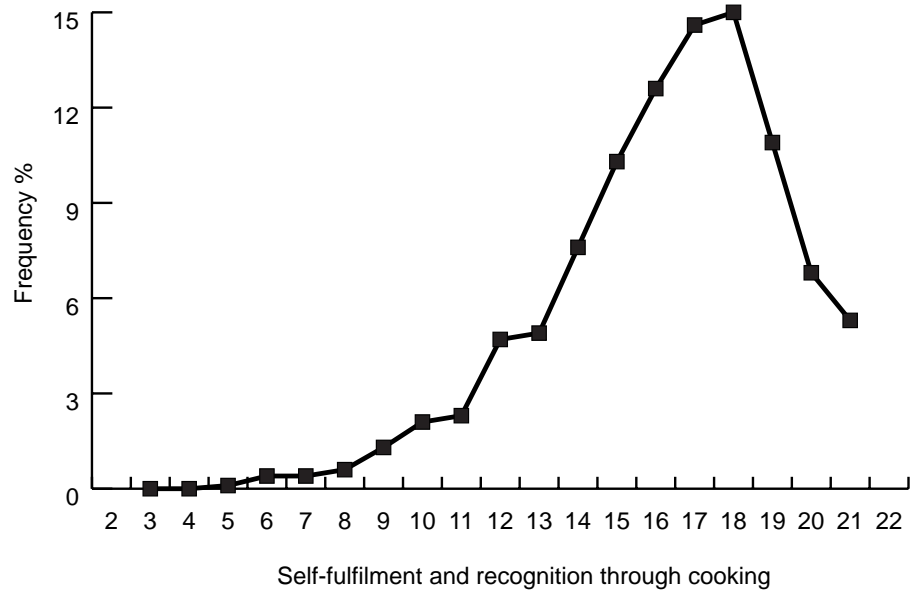


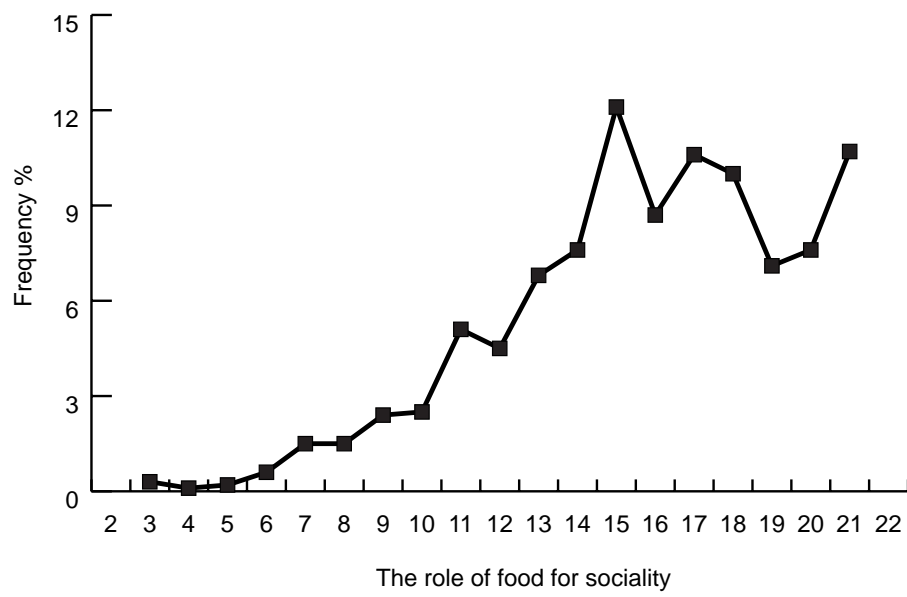


### Consumption situations



### Purchasing motives





**TABLE 1. RELATION BETWEEN THE 23 DIMENSIONS OF FOOD-RELATED LIFESTYLE AND DEMOGRAPHIC CHARACTERISTICS, SPAIN**

		sc1	sc2	sc3	sc4	sc5	sc6	apa1	apa2	apa3	apa4	apa5	apa6
Gender	male										-		-
	female										+		+
Age	high		-							--			
	low		+							++			
Partner	yes												
	no												
Number of persons	more					++							
	less					--							
Number of children	yes												
	no												
Education	none	-					-			--		++	
	O-levels	+					+			+		-	
	A-levels	+					+			+		--	
	further ed.	-					+			++		--	
Employment	full-time		-				++						
	part-time		-				-						
	unemp., stud		+				-						
	pensioner		+				--						
	housewife		+				-						
Partner's education	none					-		-		-			
	O-levels					+		+		-			
	A-levels					+		+		-			
	further ed.					+		+		+			
Household income (pa)	-100.000 ptas	+				++	+		++		++		++
	100.-250.000	-				--	-		-		-		-
	250.001+	-				--	+		--		--		--
Size of town	-19.999 indb					-	+	+	-	--			
	20.-100.000					-	-	-	-	--			
	100.-500.000					-	-	+	-	--			
	500.001+					+	+	-	+	++			
Region	North East	--		+		-		--	-	+	-		
	East	-		+		-		-	-	++	+		
	Andalusia	-		+		+		--	-	++			
	Central	--		+		+		-	-	++	+		
	North West	-		+		+		+	-	+			
	North-central	-		+		-		-	-	+			
	Barcelona	-		+		--		-	--	+	-		
	Madrid	+		-		+		++	++	--	+		

Only demographic characteristics which are related to food-related lifestyle have been included. + or - stand for a positive or a negative correlation with a given dimension significant at the 5% level. ++ or -- stand for a positive or a negative correlation significant at the 1% level. The table is based on a linear model where all demographic variables are included.

		cs1	cs2	cs3	cs4	cs5	cs6	us1	us2	co1	co2	co3
Gender	male female						- +					
Age	high low		-- ++	-- ++		+ -	++ --		-- ++		++ --	-- ++
Partner	yes no											
Number of persons	more less		+ -						-- ++			
Number of children	yes no											
Education	none O-levels A-levels further ed		- + + +	-- ++ + +			++ - - --			+ - - -	+ - - -	- + + +
Employment	full-time part-time unemp., stud. pensioner work at home											+ - - - -
Partner's education	none O-levels A-levels further ed											
Household income (p.a.)	-100.000 plus 100.-250.000 250.001+											
Size of town	-19.999 indb 20.-100.000 100.-500.000 500.001+											
Region	North East East Andalusia Central North West North-central Barcelona Madrid	- + - - - + - +	- + + + + + + --	+ + ++ + + - - --	- - - - + - - +		- + + + - - - +	- - + ++ + - - --	- + + - ++ - + --	- + - + - + - +		- + - - ++ + + -

#### Ways of shopping

sc1 influenced by product information  
sc2 influenced by/likes adverts  
sc3 like shopping  
sc4 shop in specialist shops  
sc5 price conscious  
sc6 use a shopping list

#### Quality aspects

apa1 healthiness  
apa2 price/quality relationship  
apa3 novelty  
apa4 ecological/naturalness  
apa5 taste/tastiness  
apa6 freshness

#### Cooking methods

cs1 interested in cooking  
cs2 innovation and challenge  
cs3 quick and easy  
cs4 the whole family helps out in the kitchen  
cs5 plan meals carefully  
cs6 a woman's job

#### Consumption situations

us1 snacks or proper meals  
us2 the importance of eating out and with other people

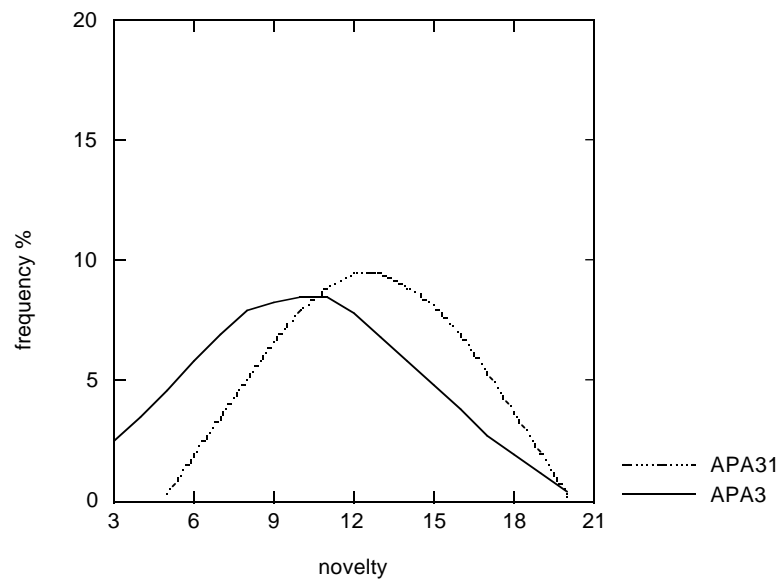
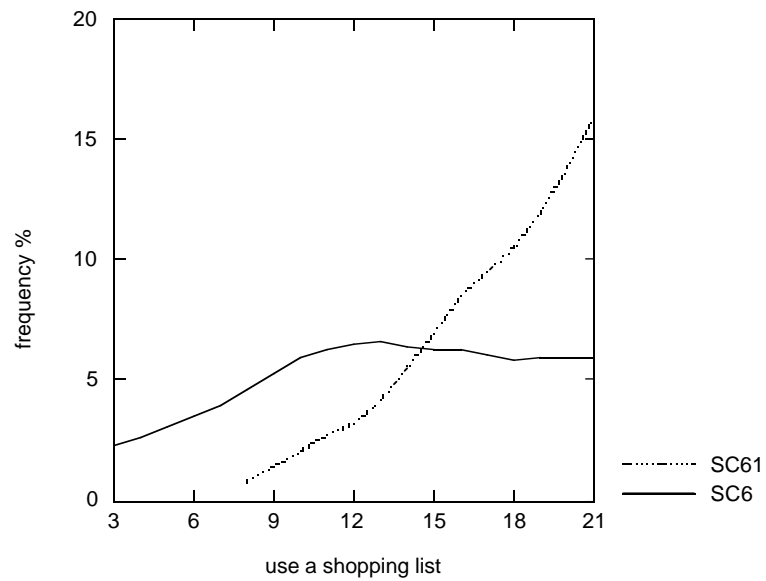
#### Purchasing motives

co1 self-fulfilment and recognition through cooking  
co2 security through eating traditionally  
co3 the role of food for sociality

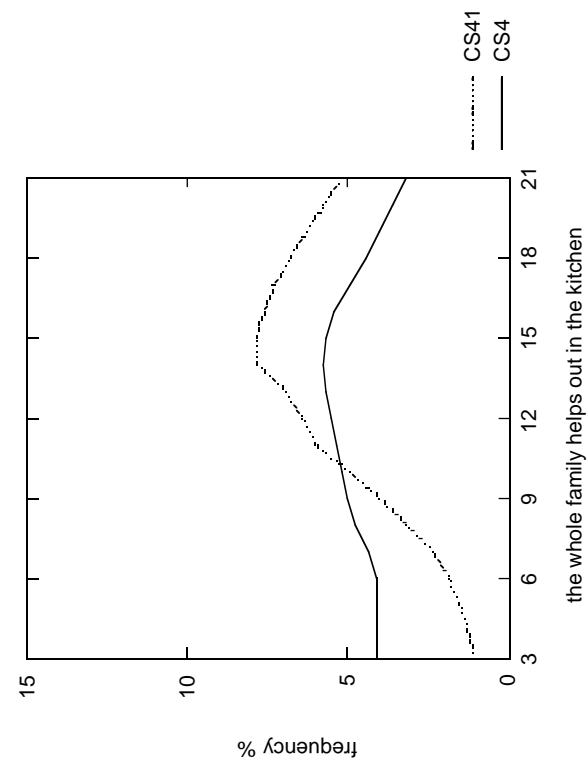
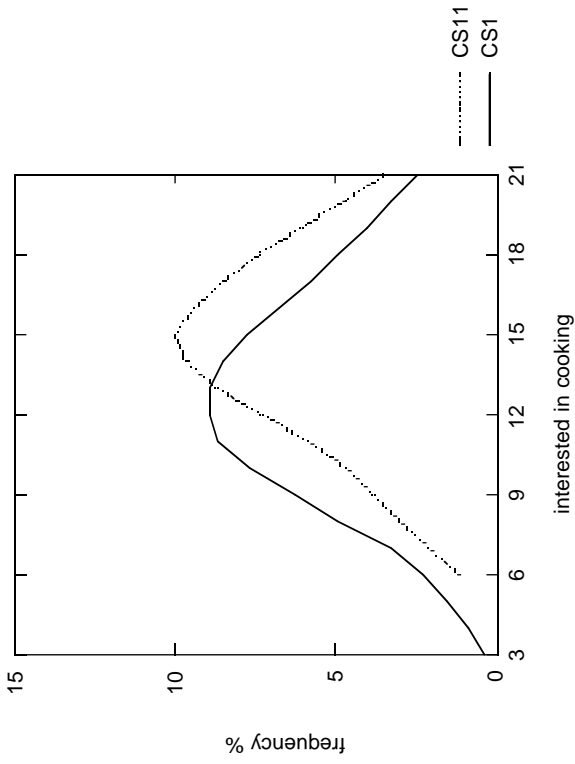
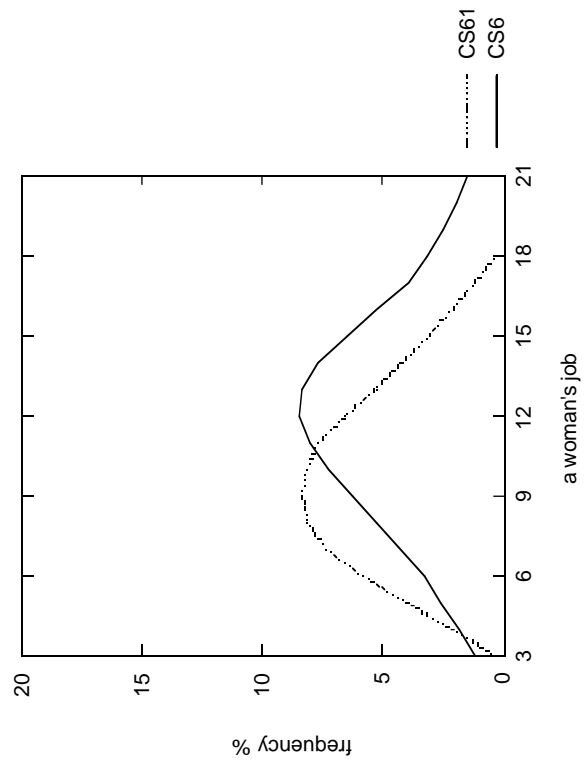
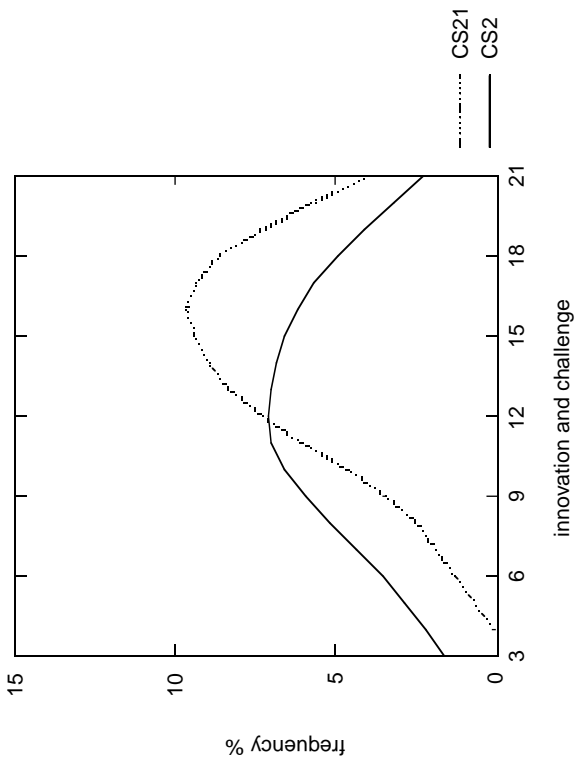
**DIAGRAM 2. DESCRIPTION OF THE SEGMENTS IN RELATION TO THE POPULATION AS A WHOLE**

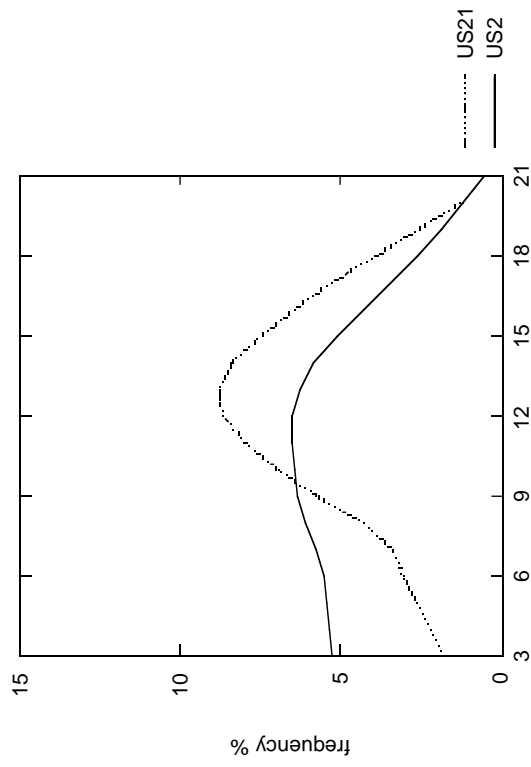
The diagrams show the frequencies within each segment and the frequencies for the total sample. Only the dimensions of food-related lifestyle that show a significant difference between the segment and the total sample, are included. The abbreviations are equivalent to the ones in Table 1. SC1 relates to “Influenced by product information” for the total sample while SC11 relates to “Influenced by product information” for segment 1.

**Segment 1: The adventurous food consumers**

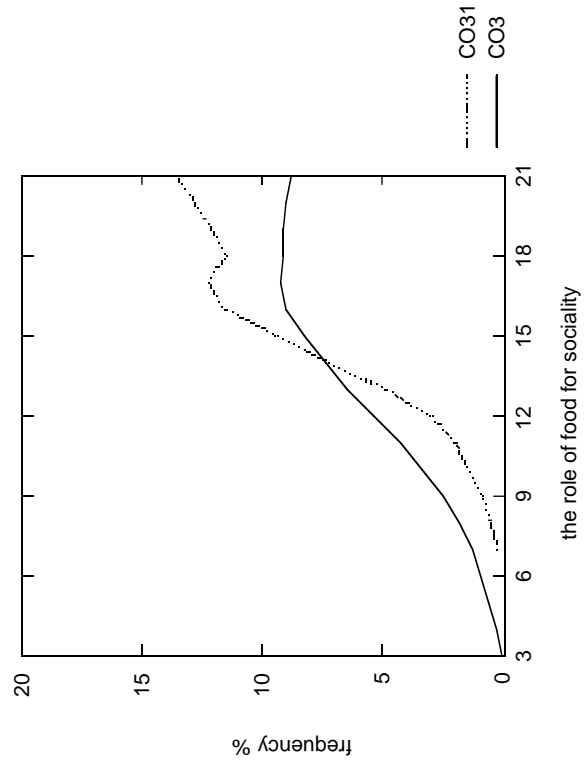




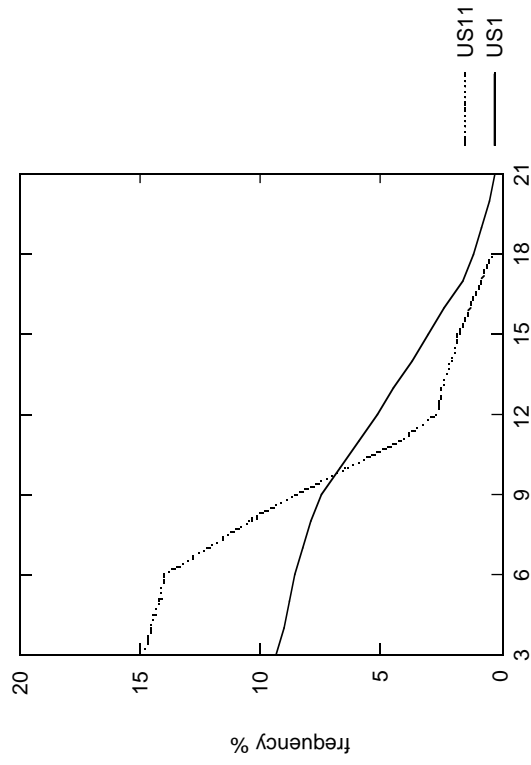




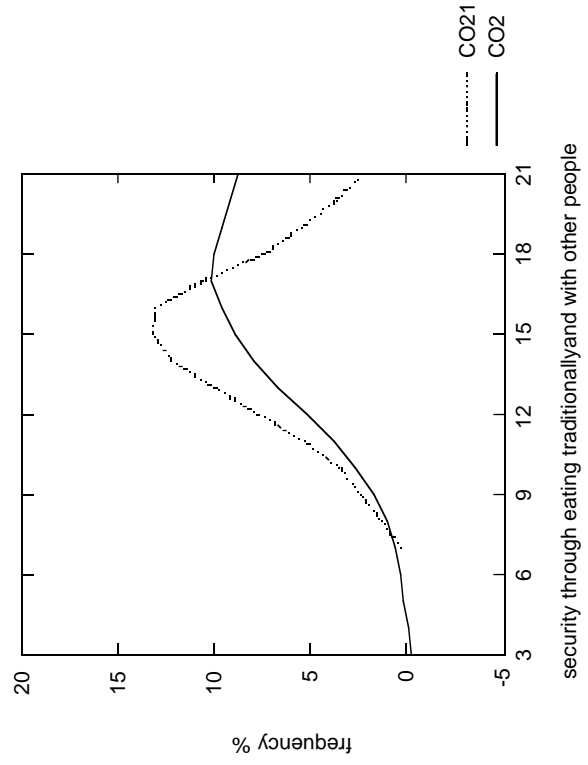
the importance of eating out and with other people



the role of food for sociality

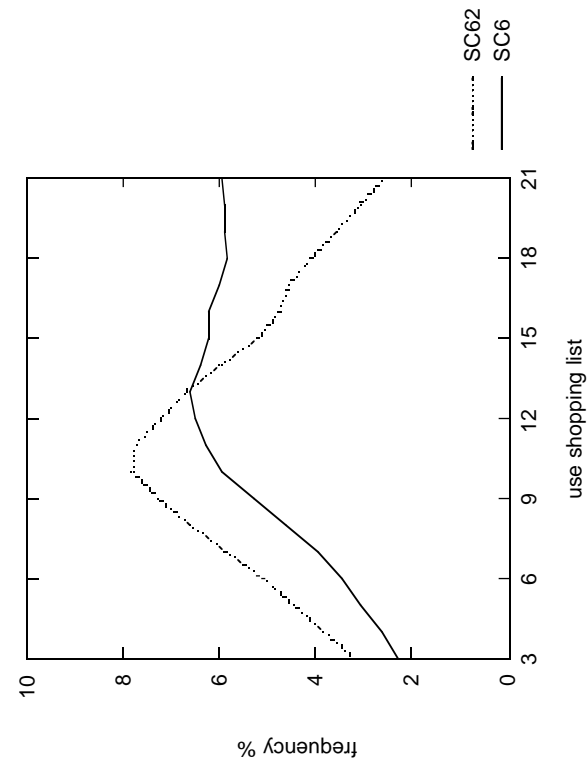
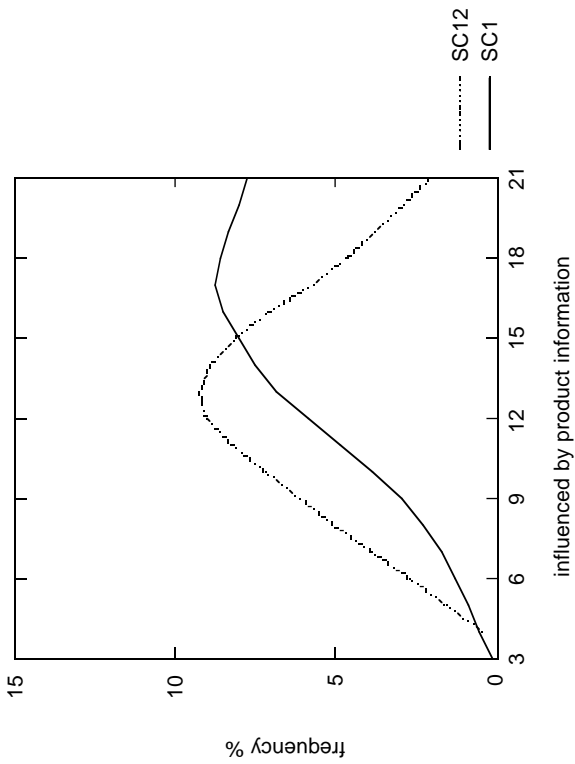
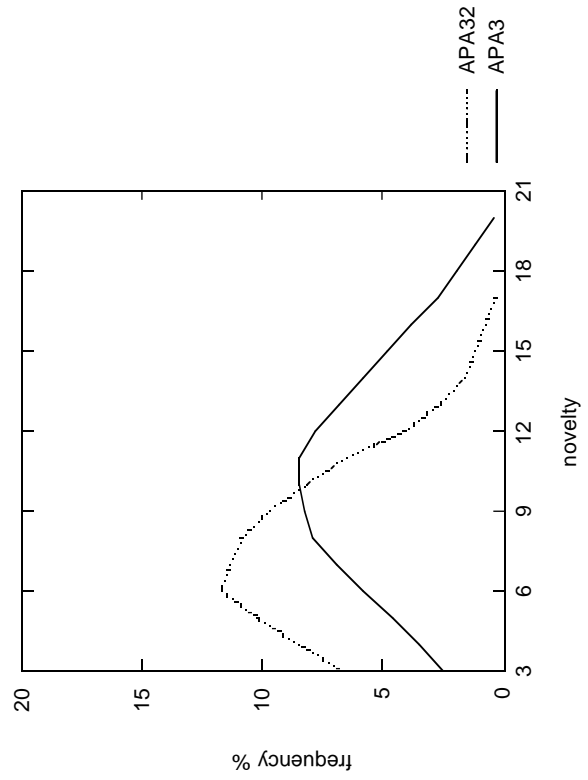
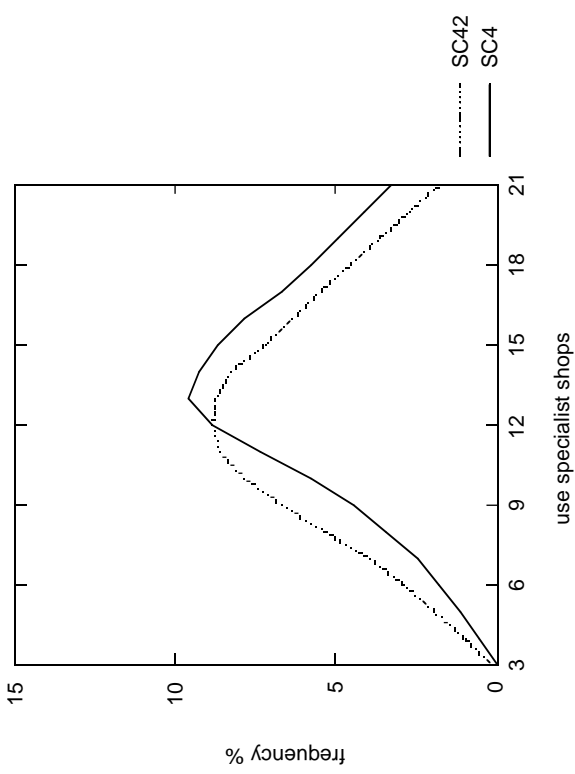


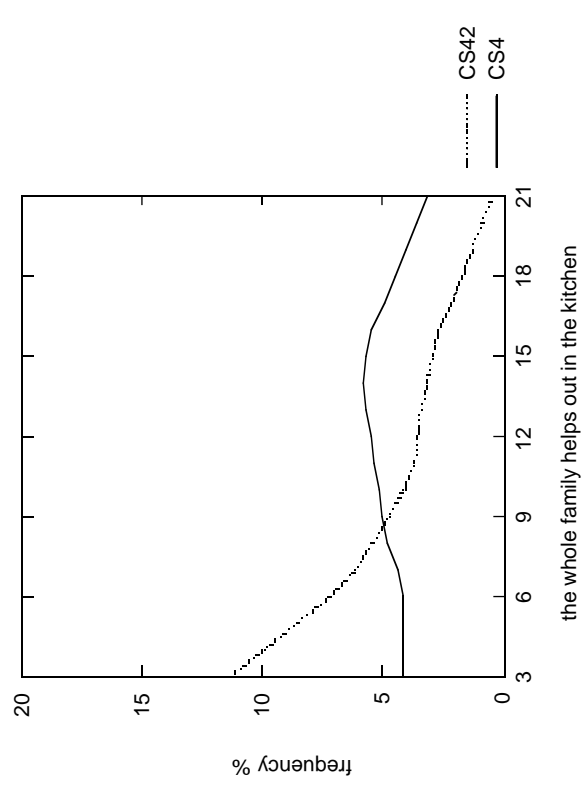
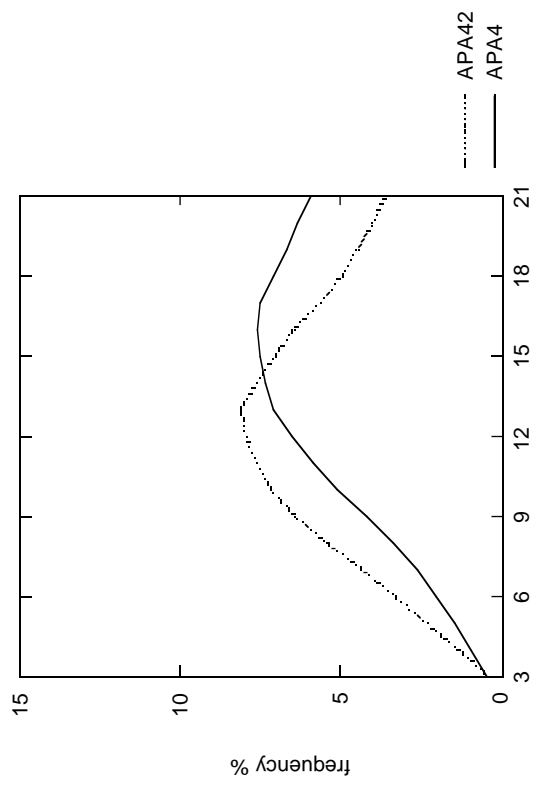
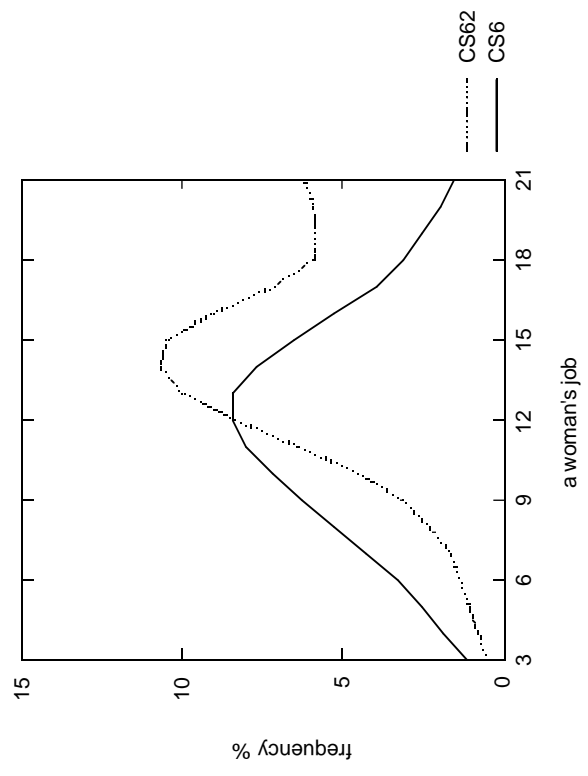
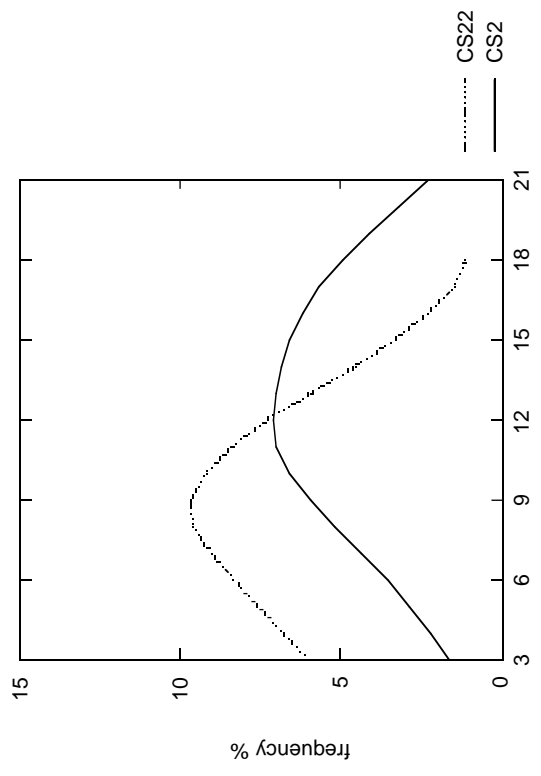
snacks rather than proper meals

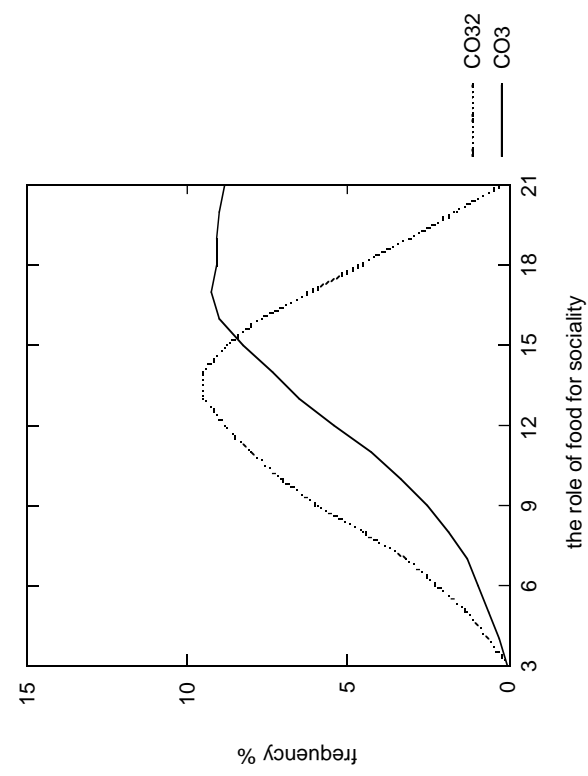
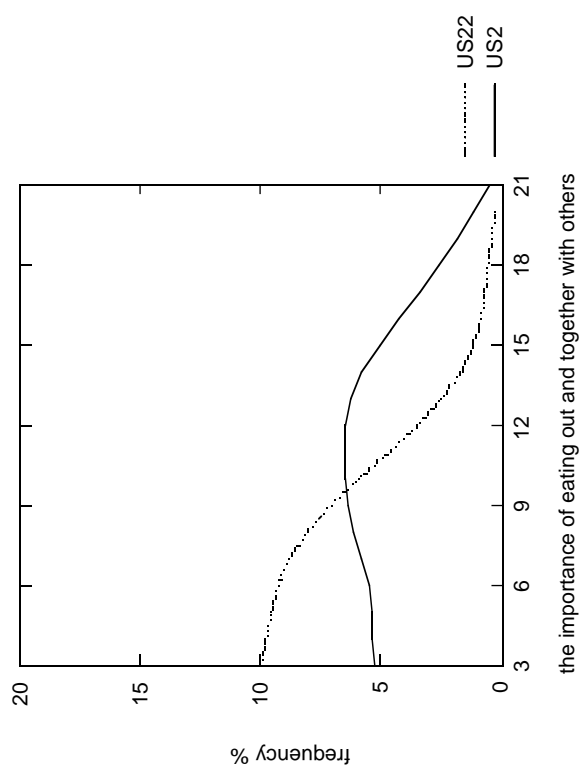
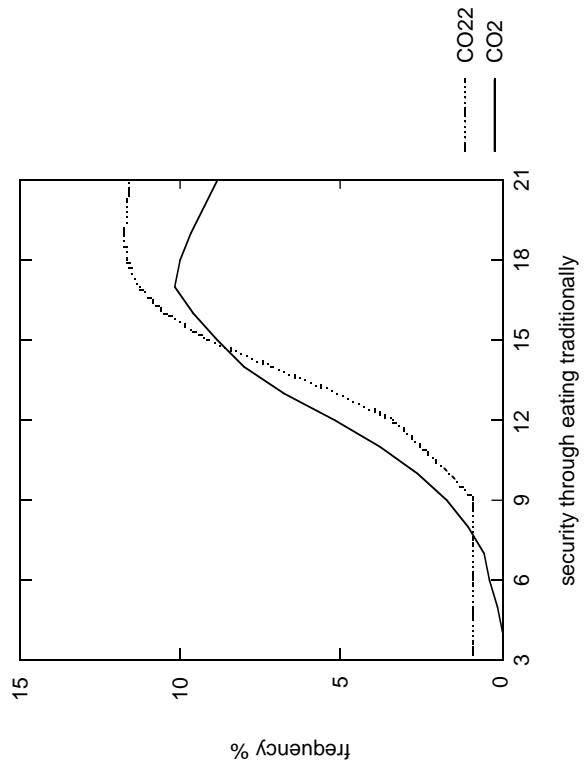


security through eating traditionally and with other people

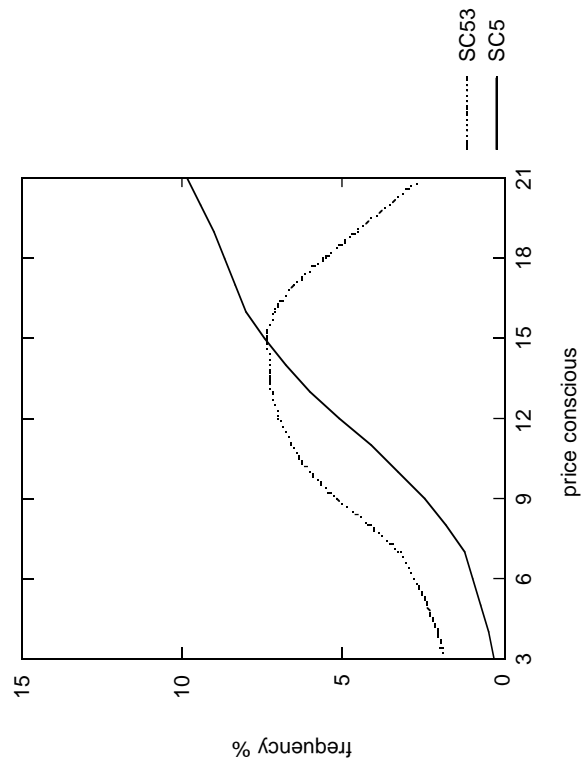
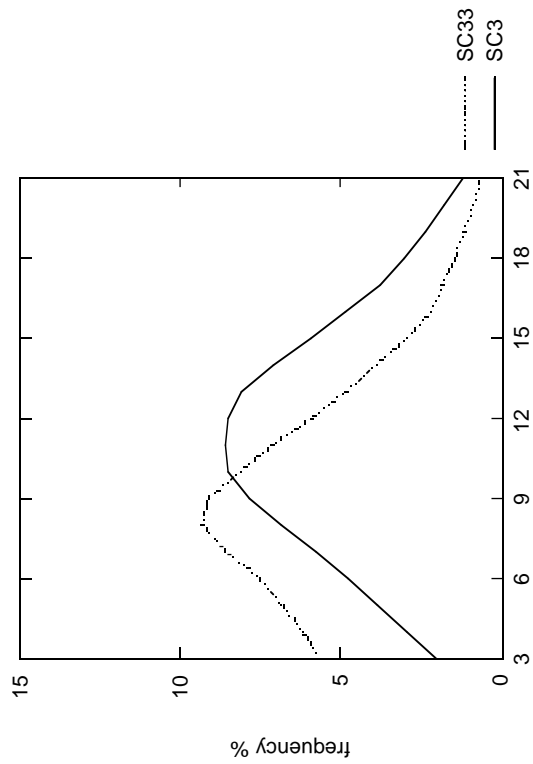
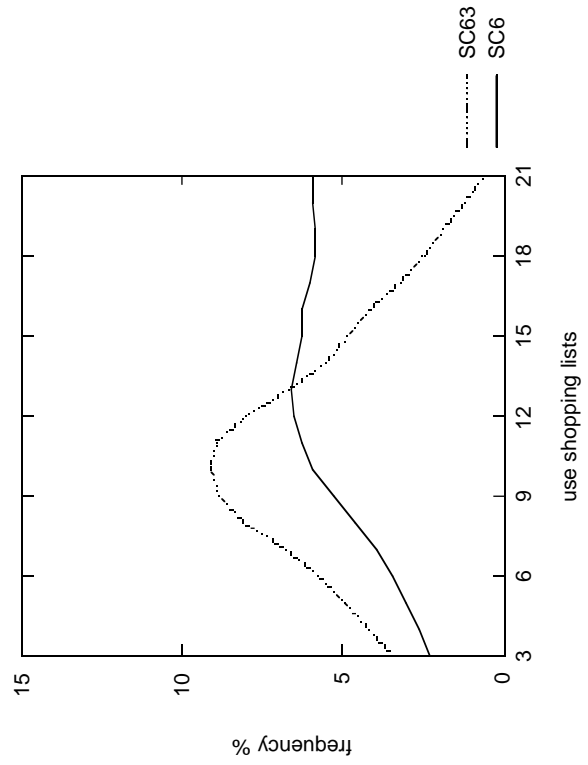
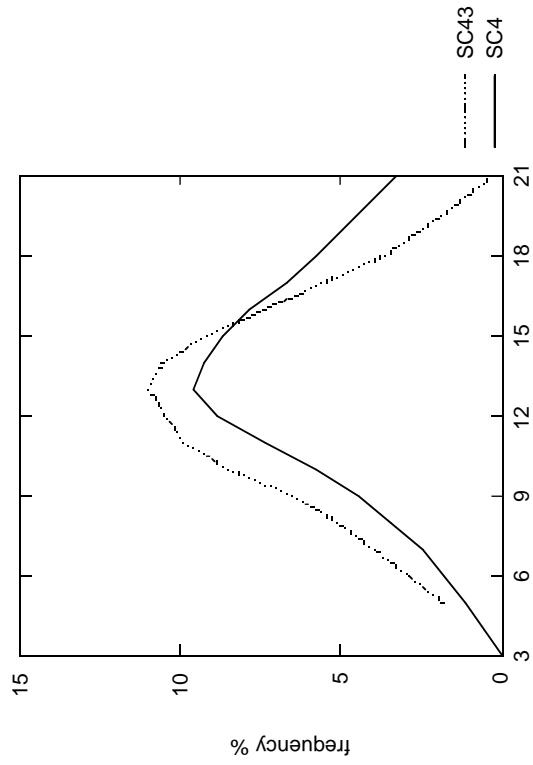
**Segment 2: The conservative food consumers**

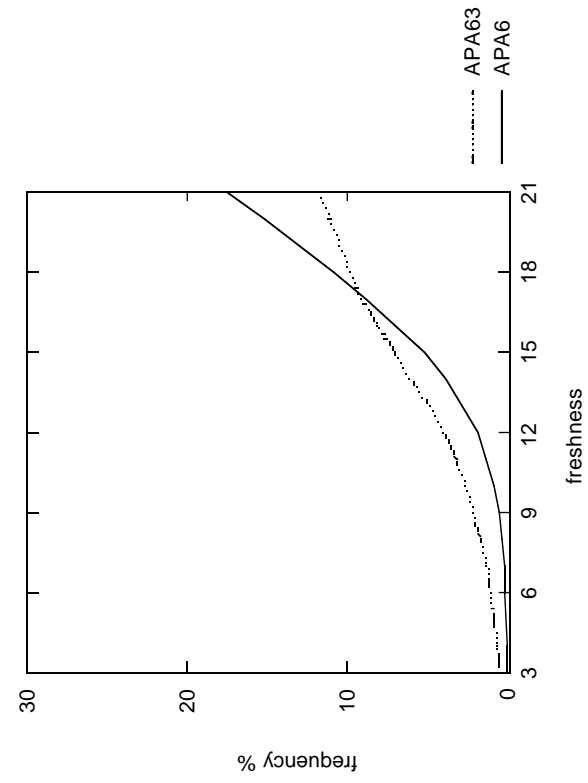
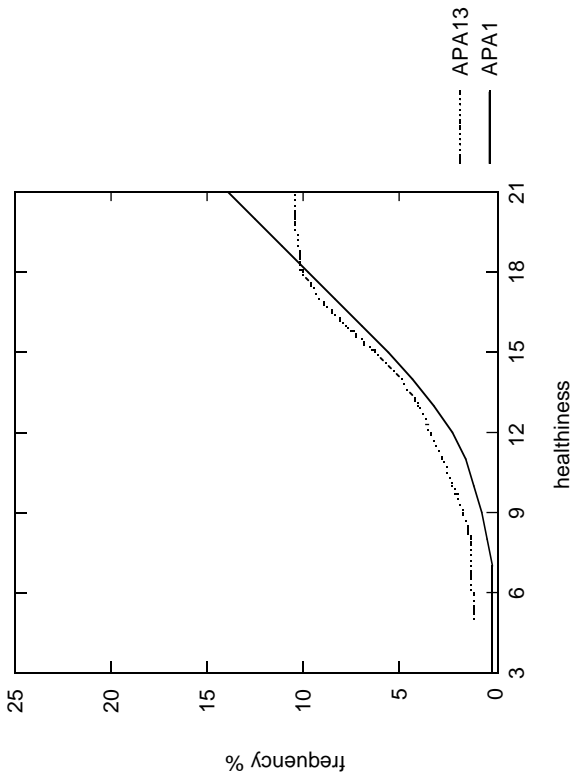
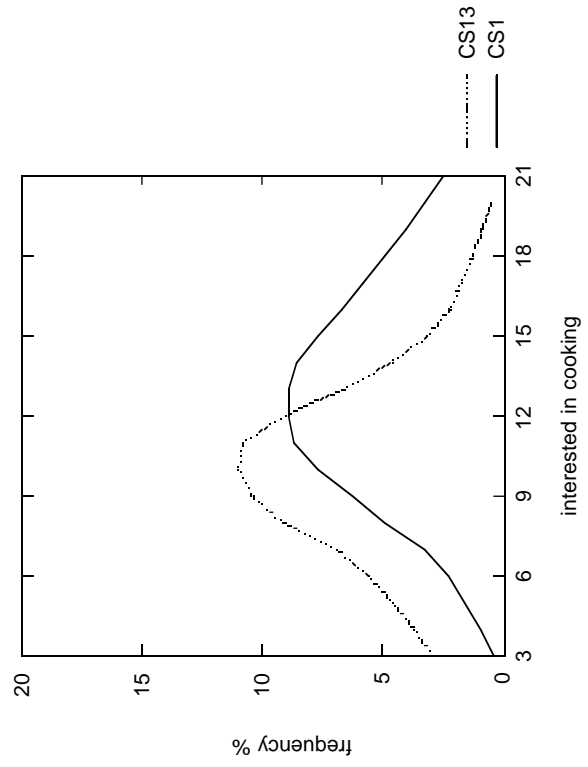
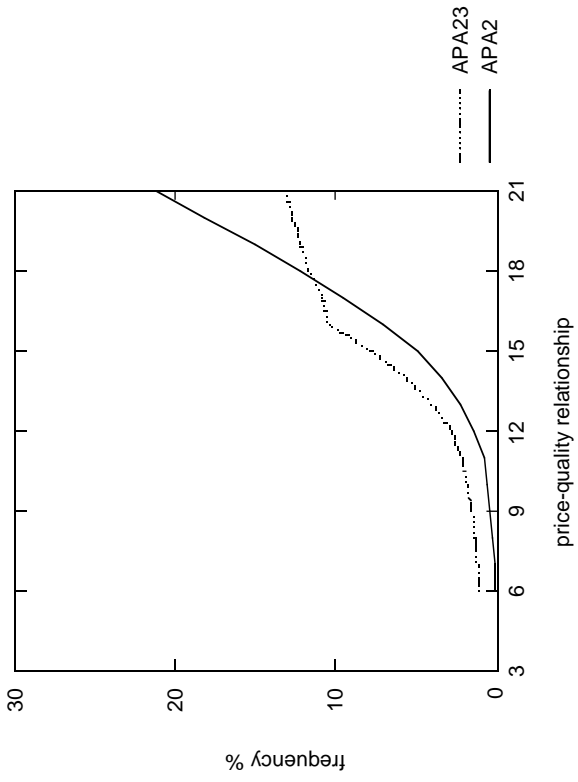


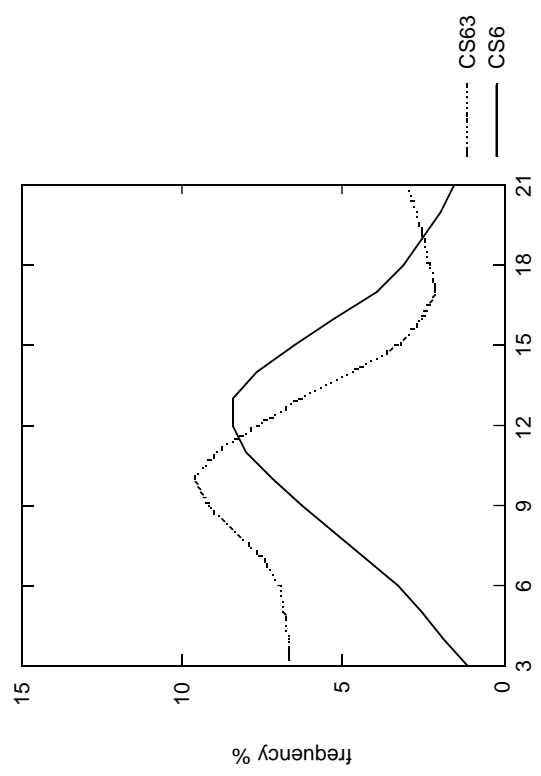
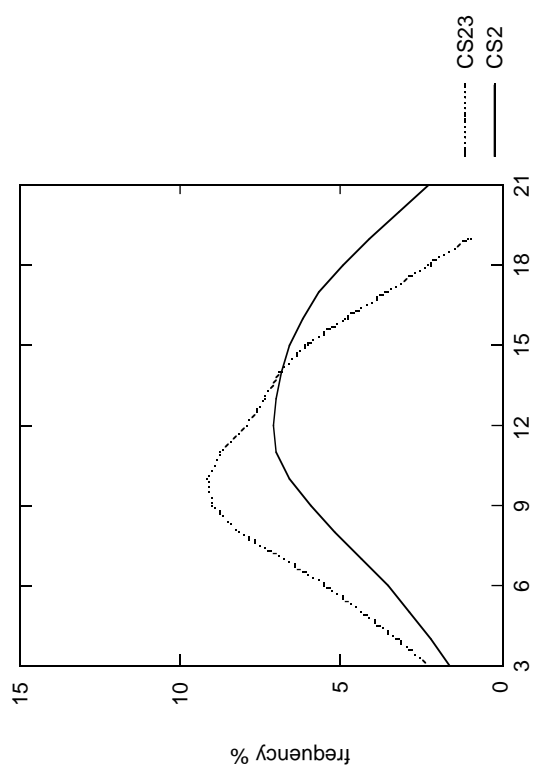
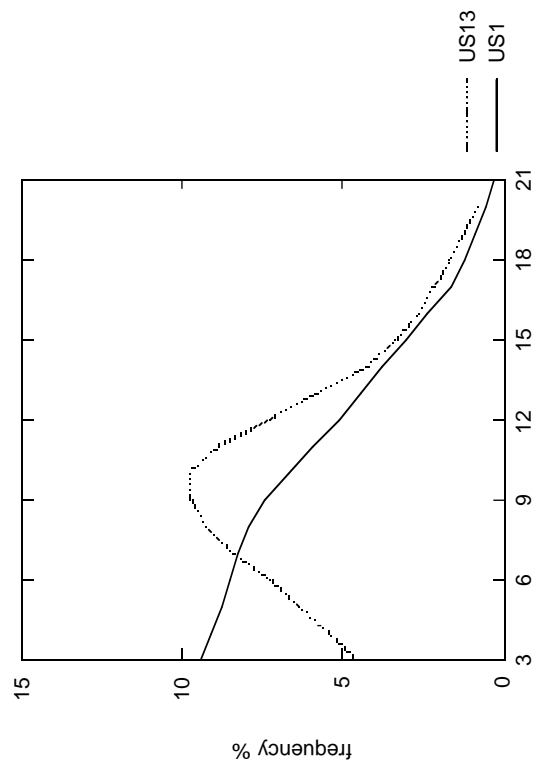
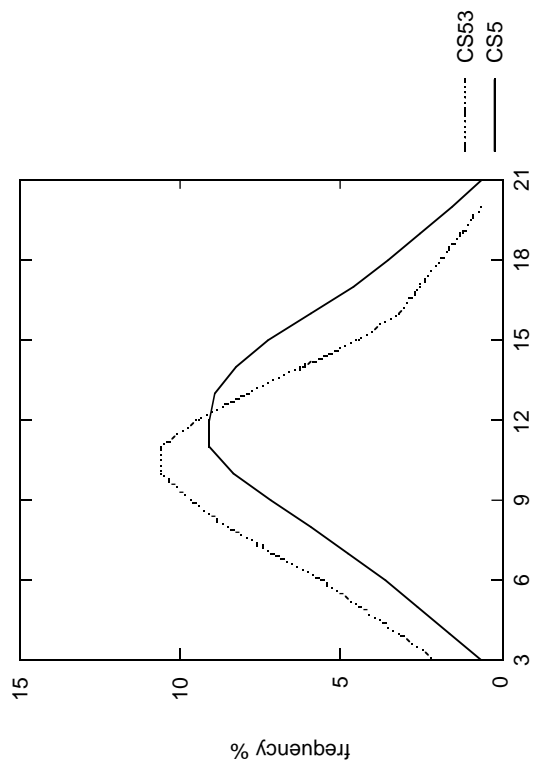




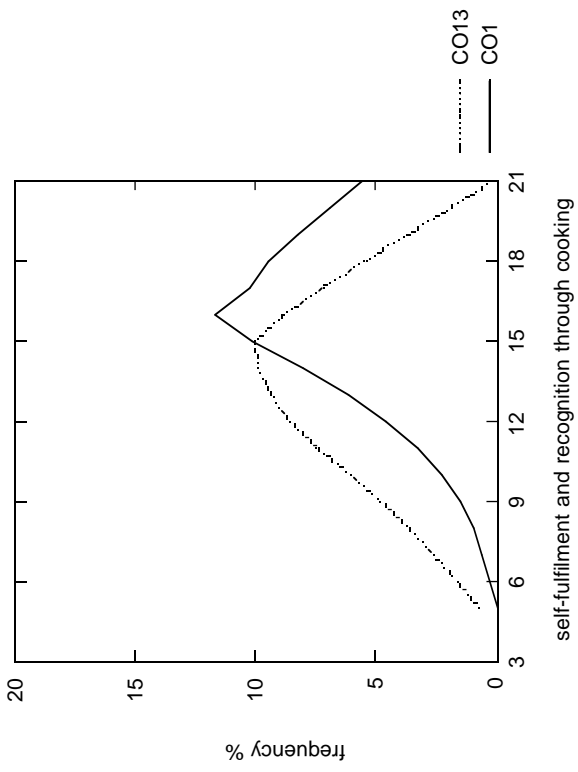
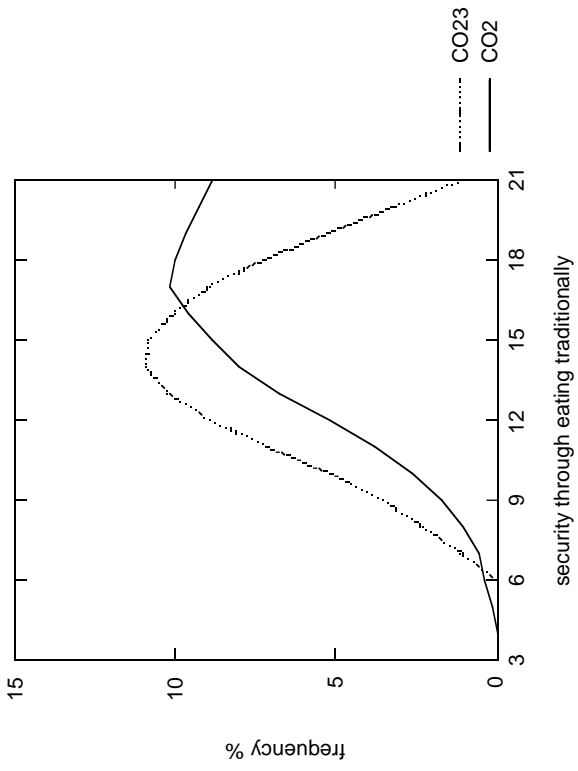
### Segment 3: The uninvolved food consumers



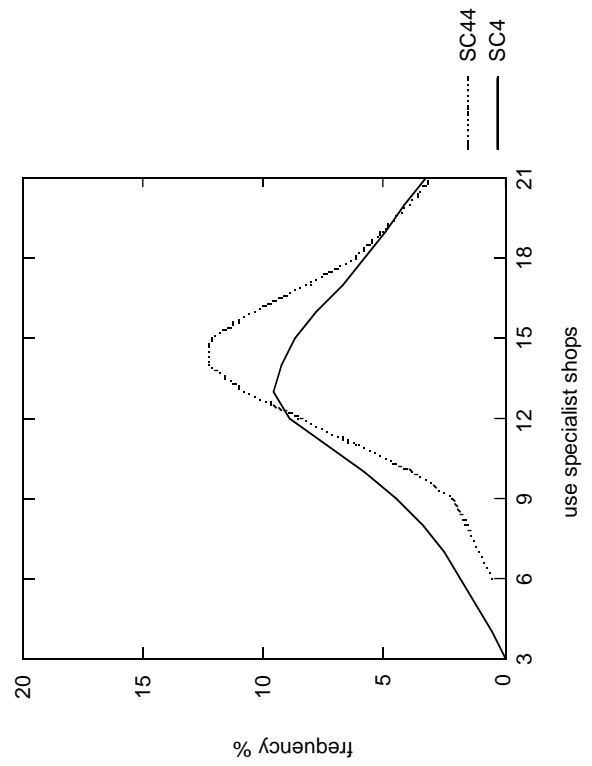
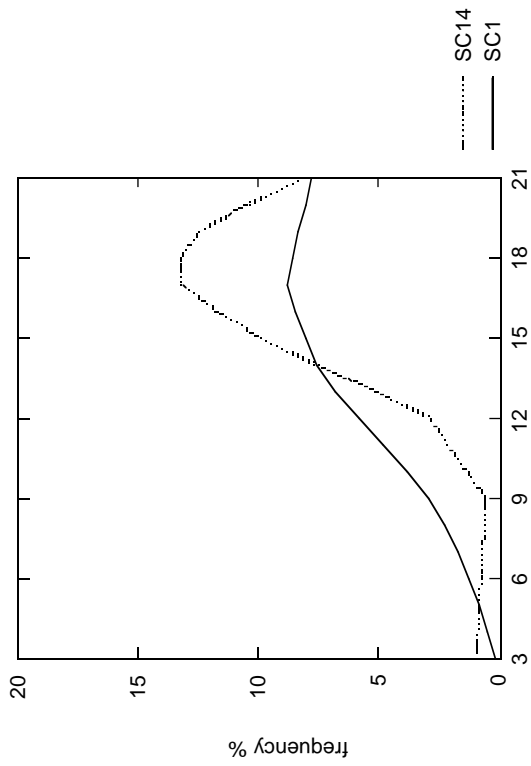
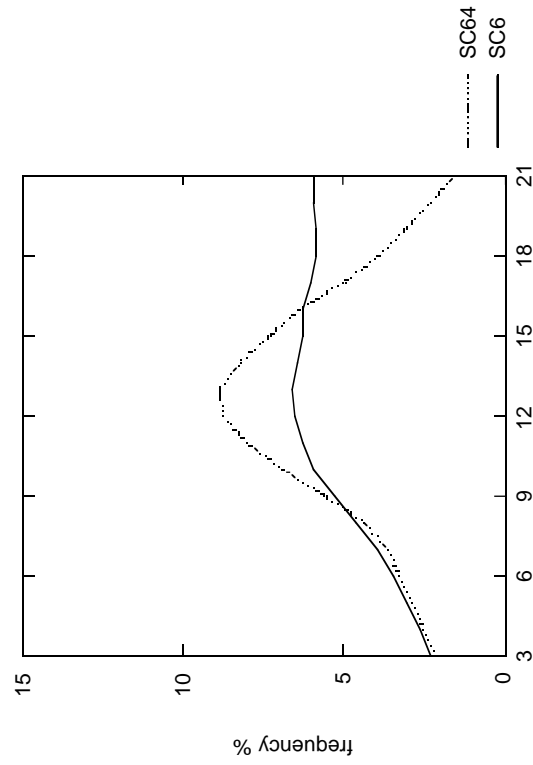
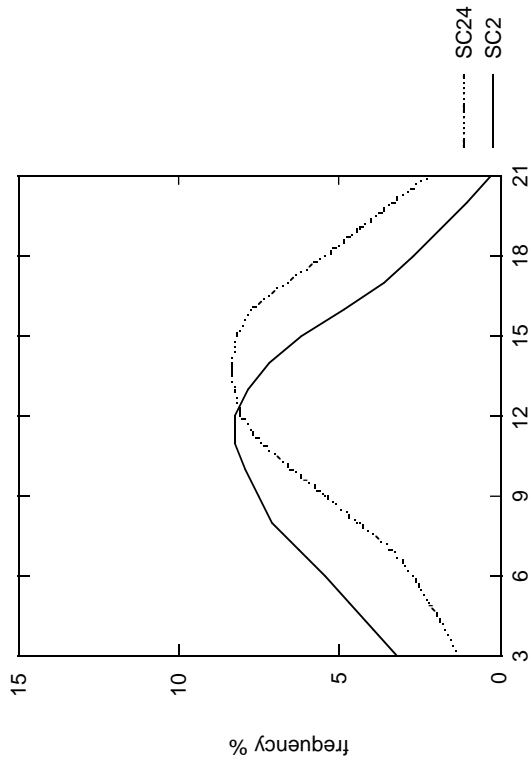


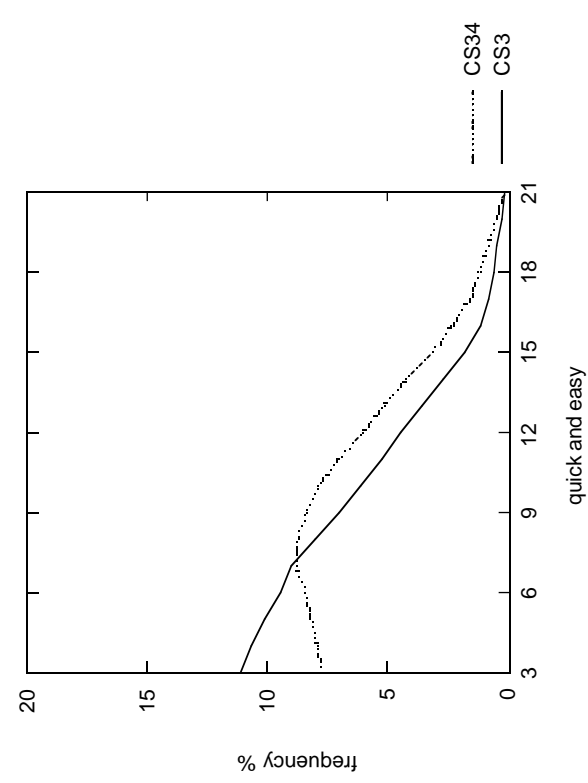
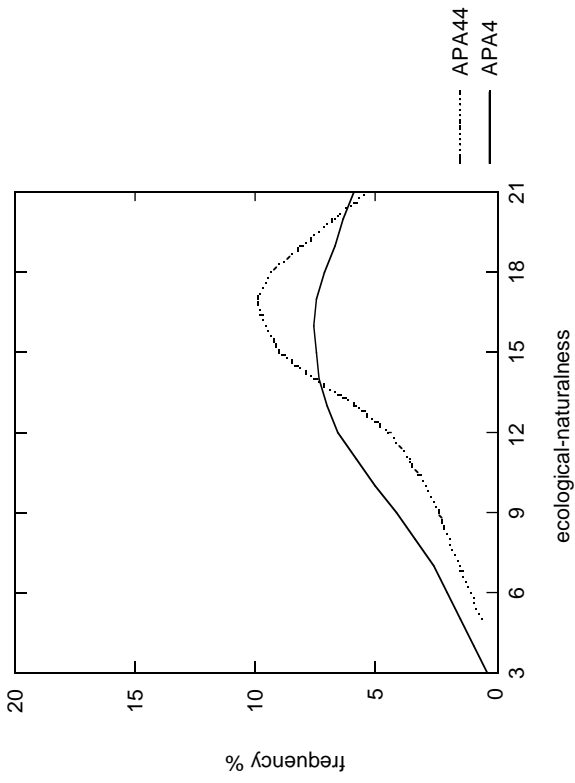
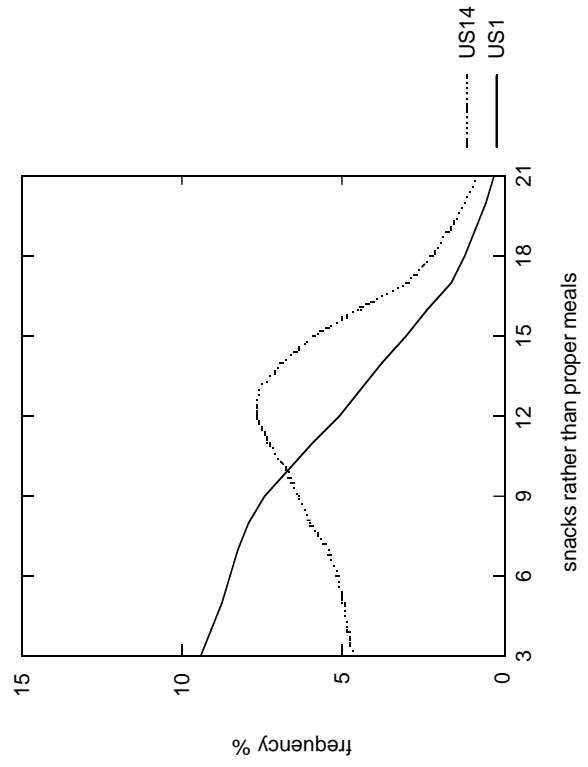
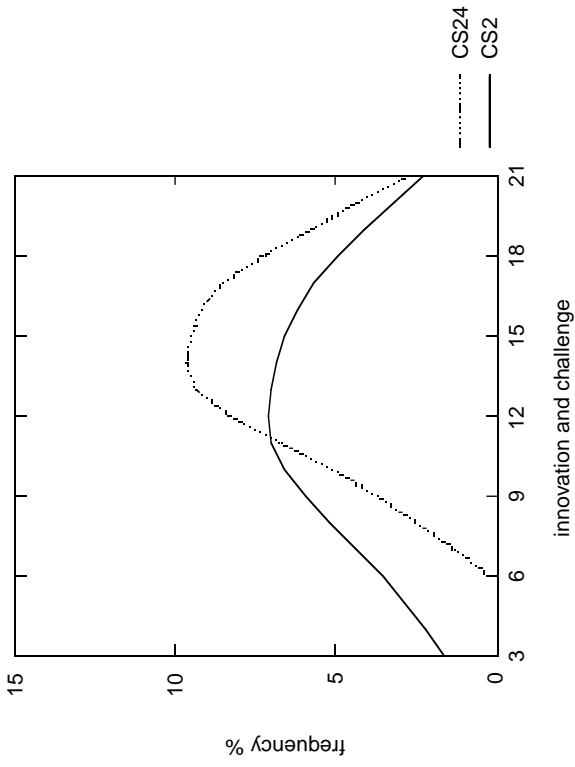


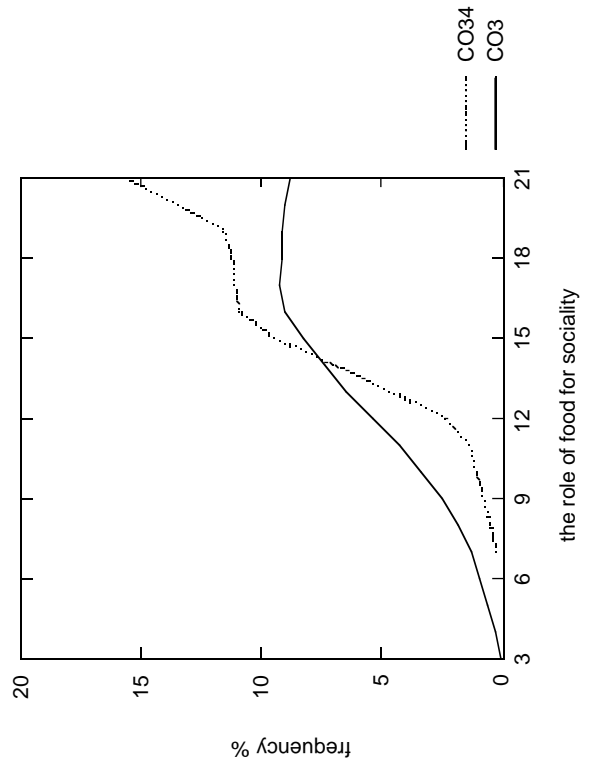
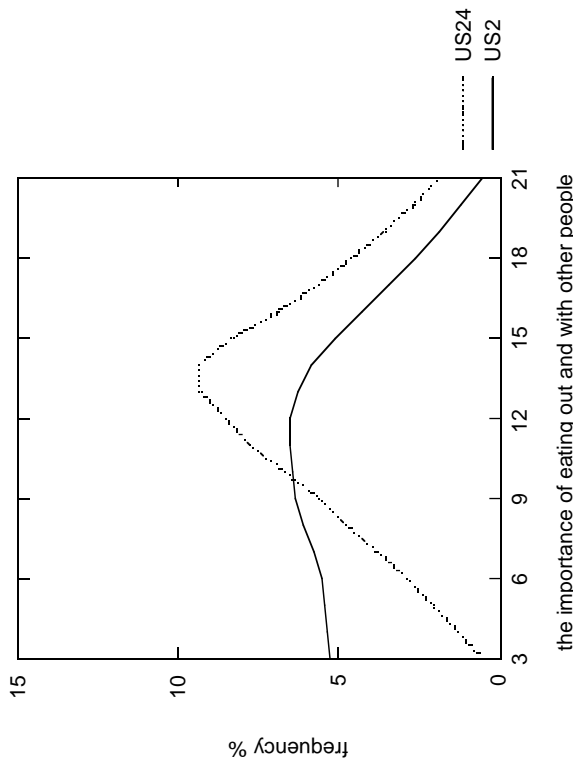
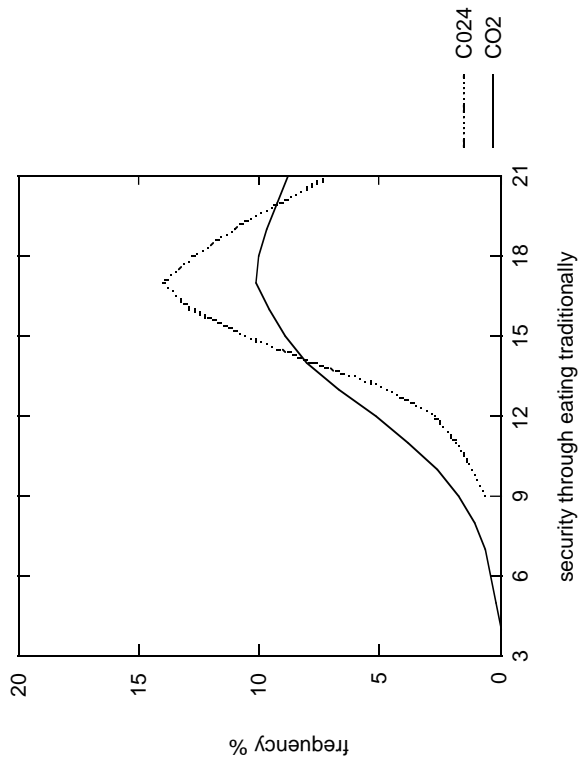




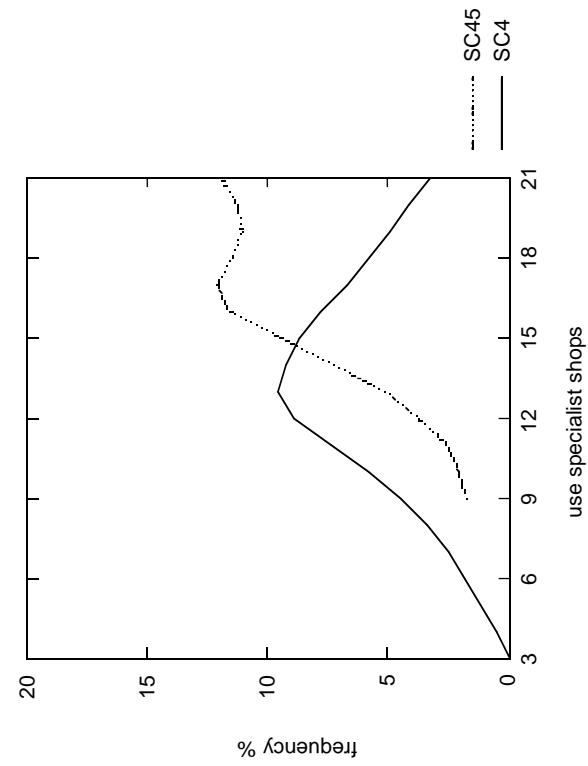
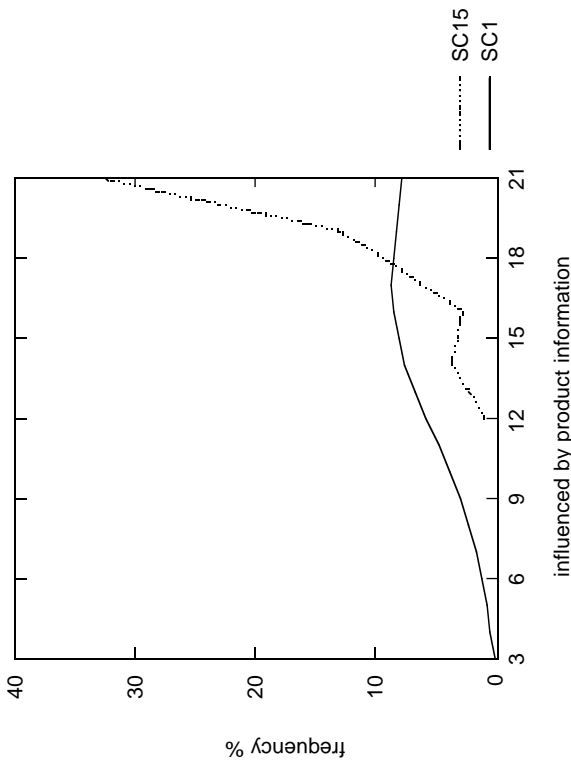
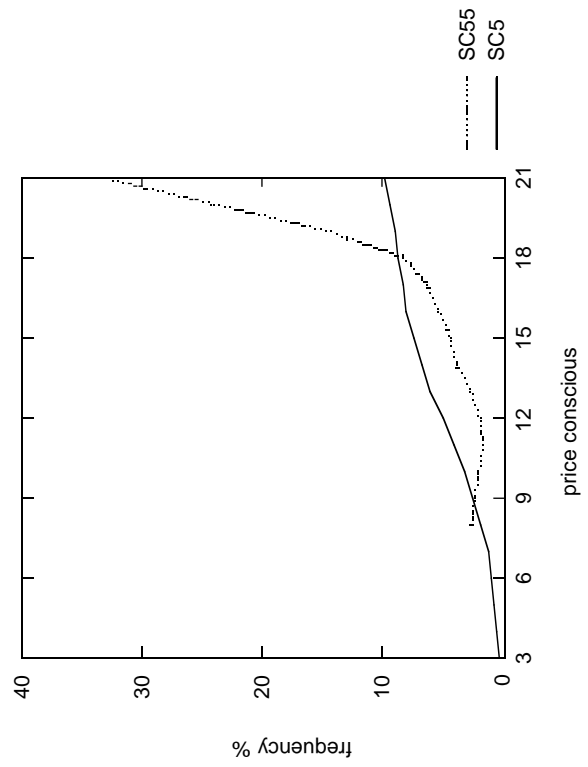
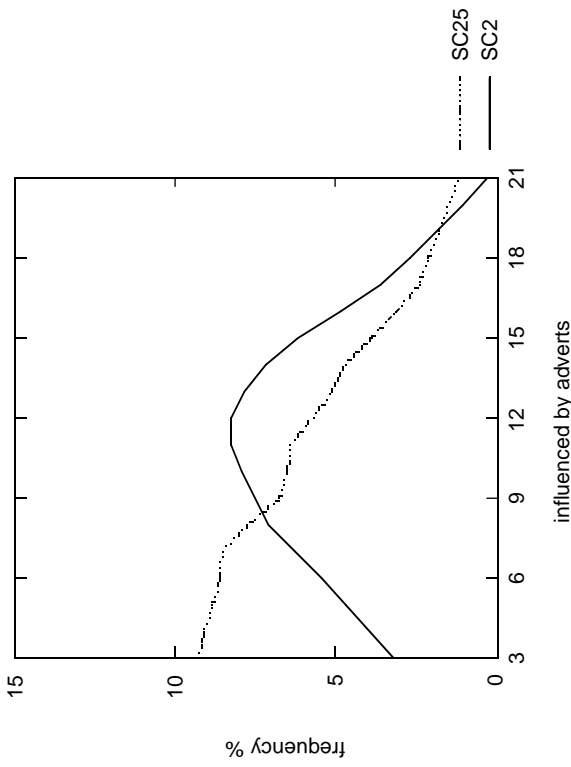
### Segment 4: The rational food consumers

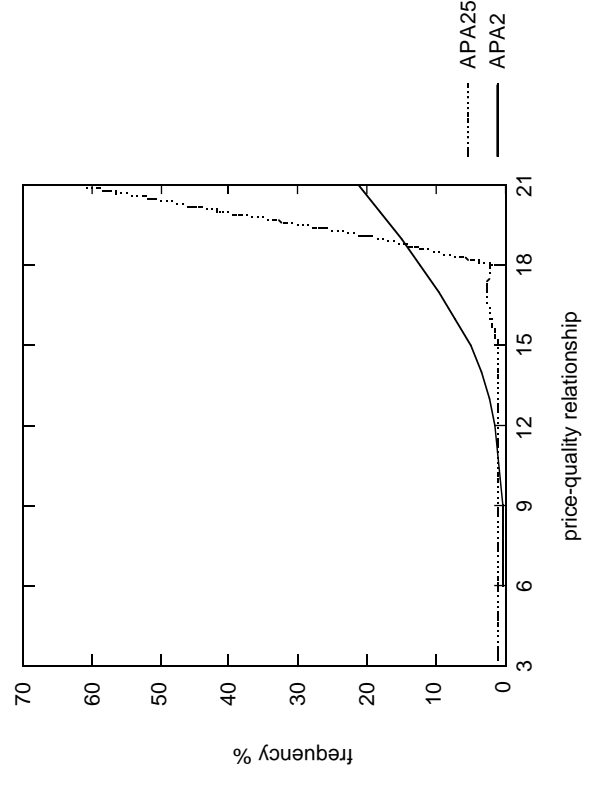
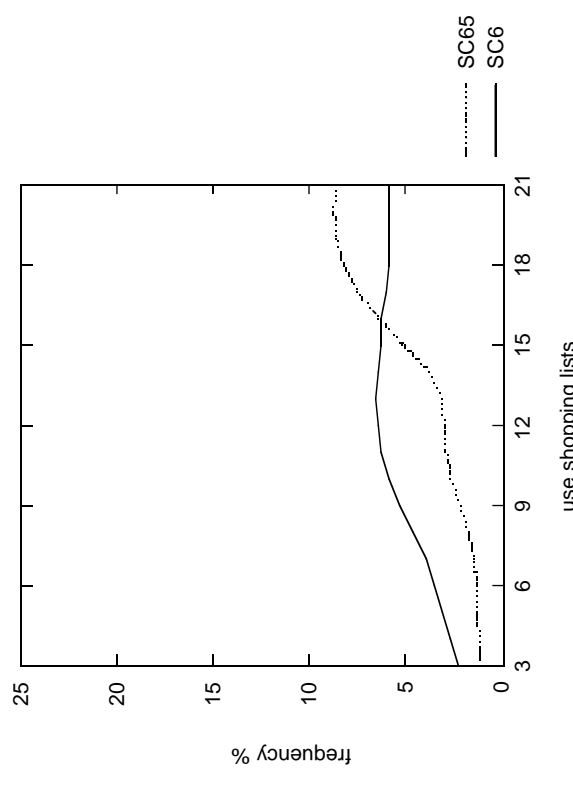
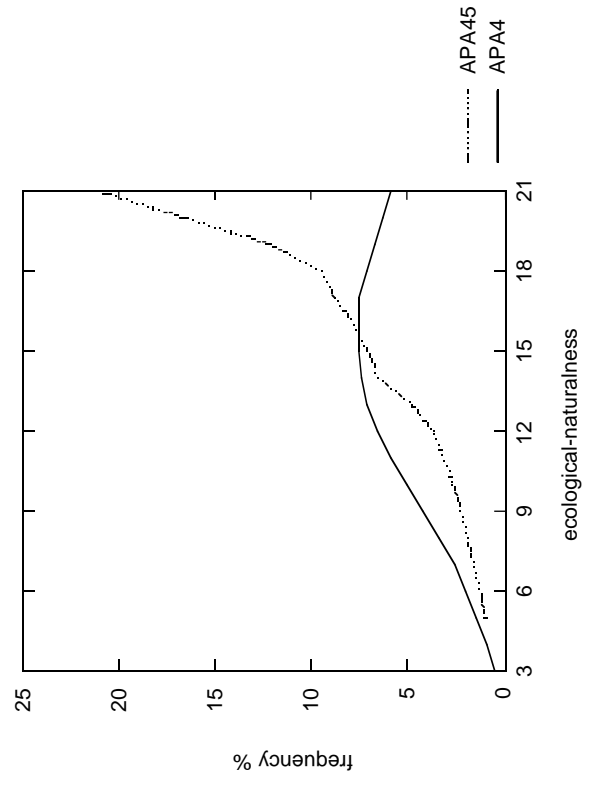
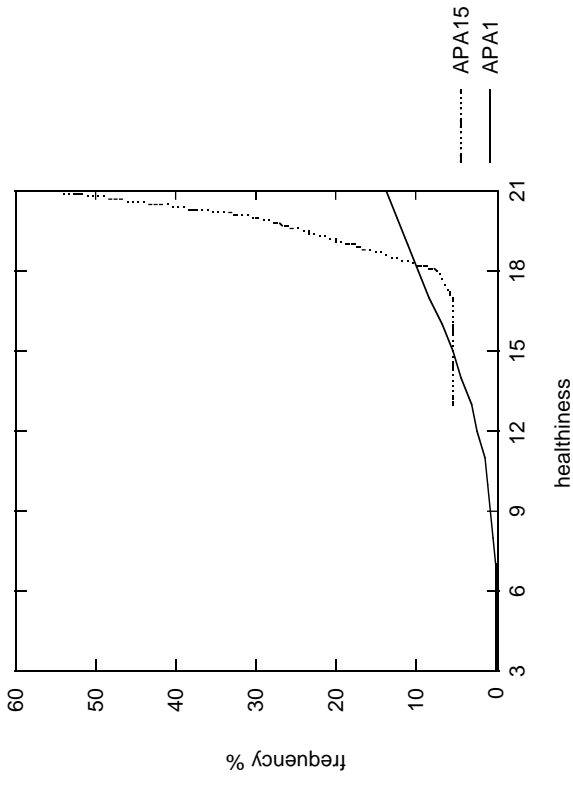


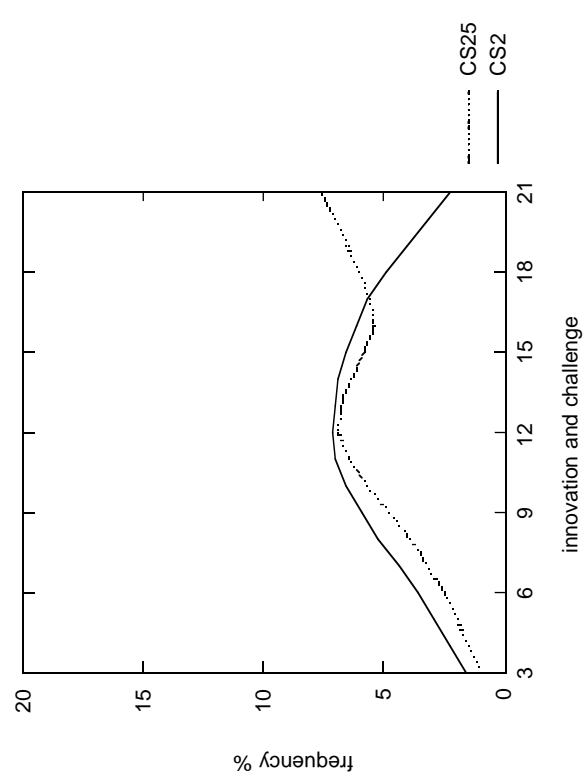
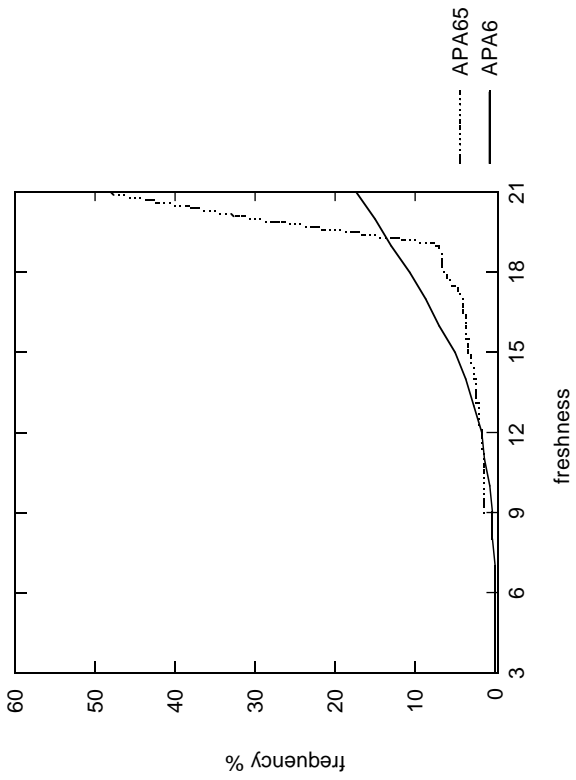
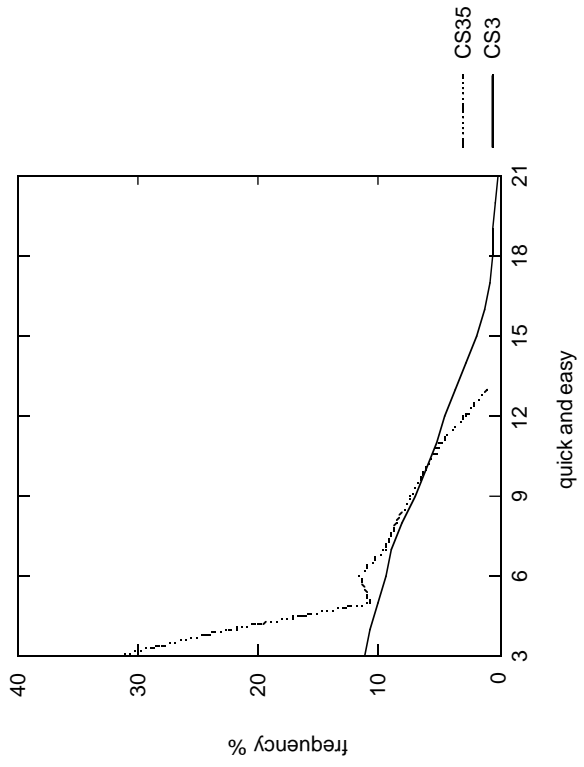
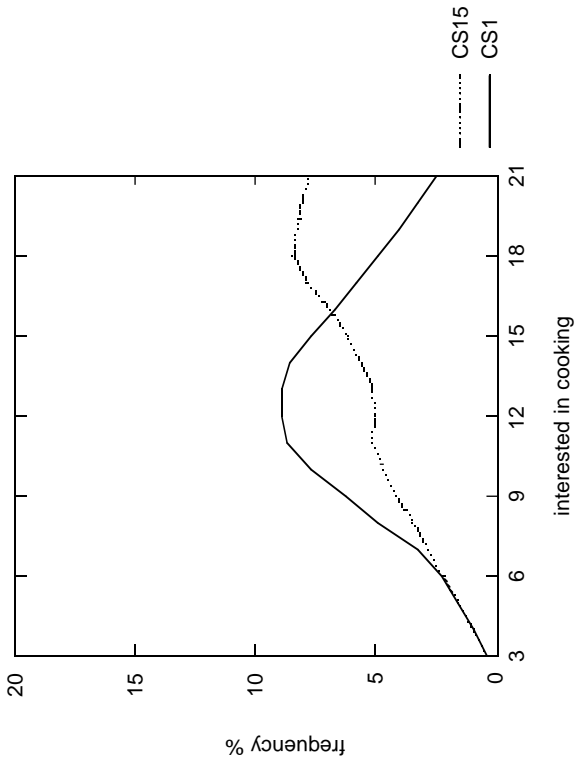


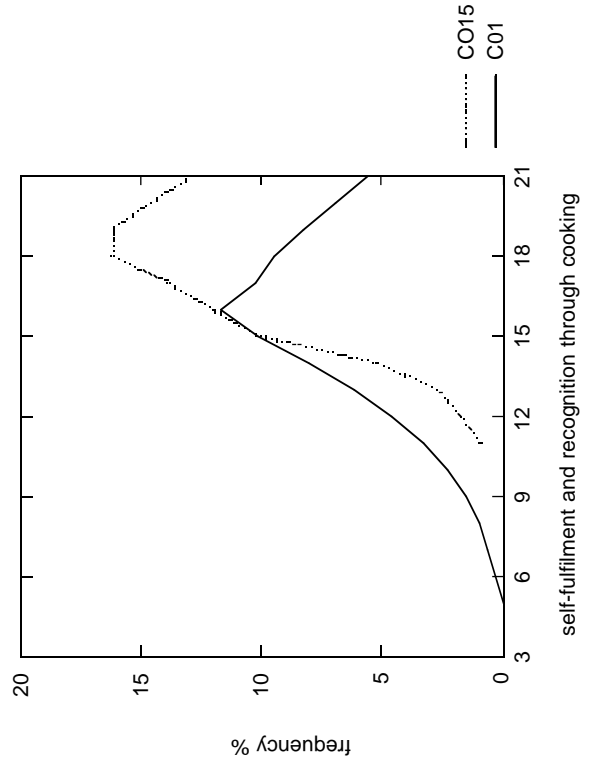
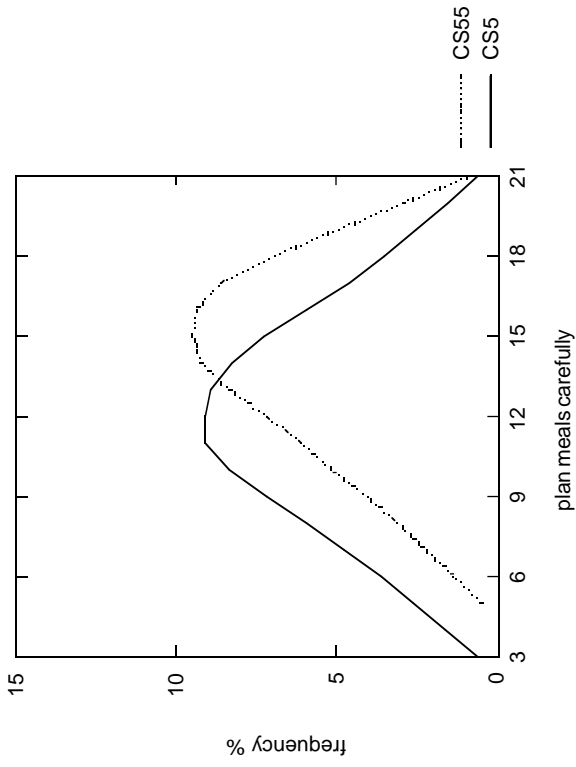
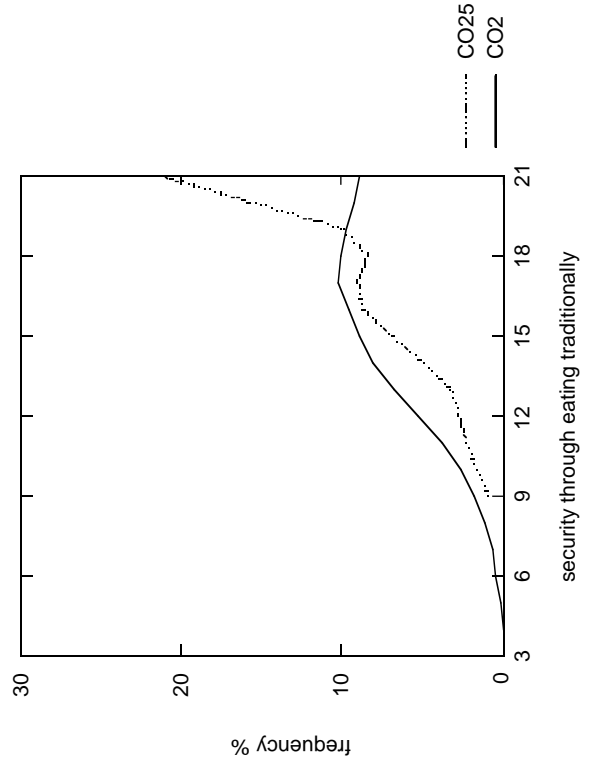
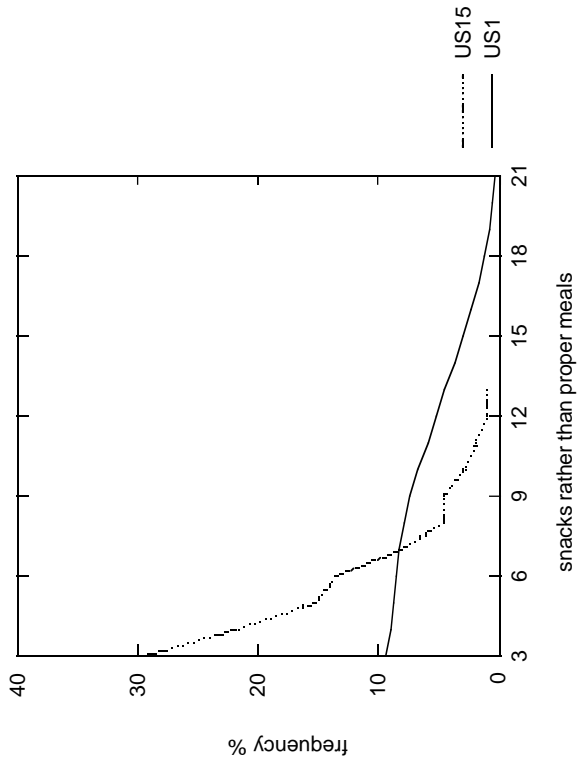


### Segment 5: The enthusiastic food consumers

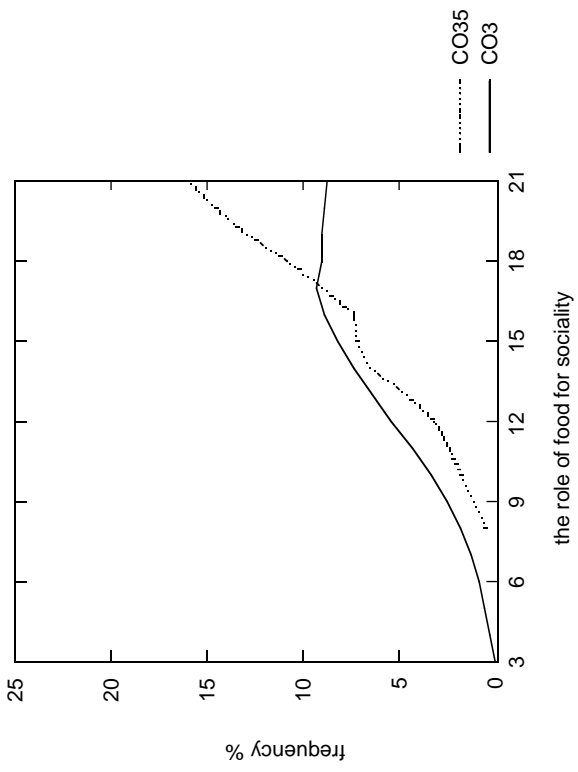












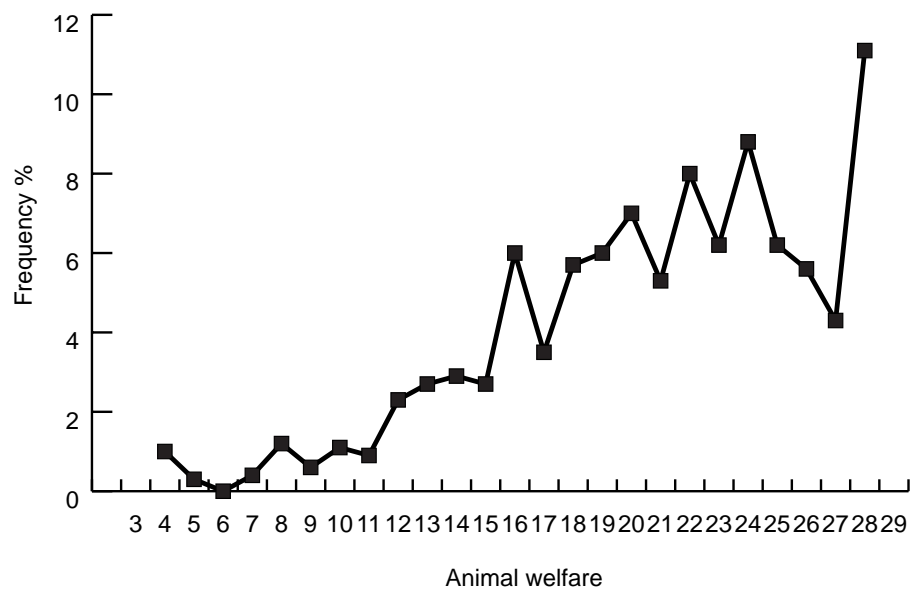
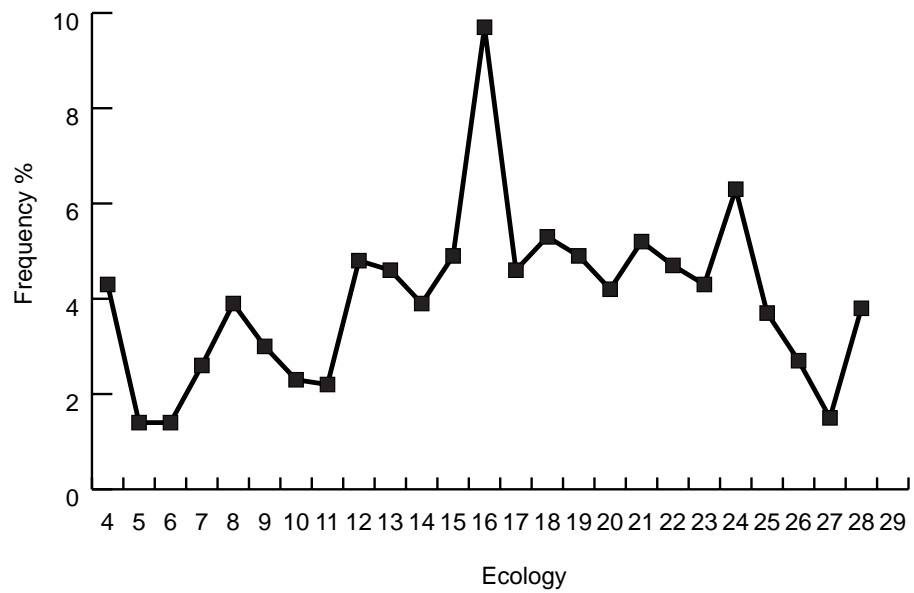
**TABLE 2. RELATION BETWEEN THE FIVE SEGMENTS OF FOOD-RELATED LIFE-STYLE AND DEMOGRAPHIC CHARACTERISTICS, SPAIN**

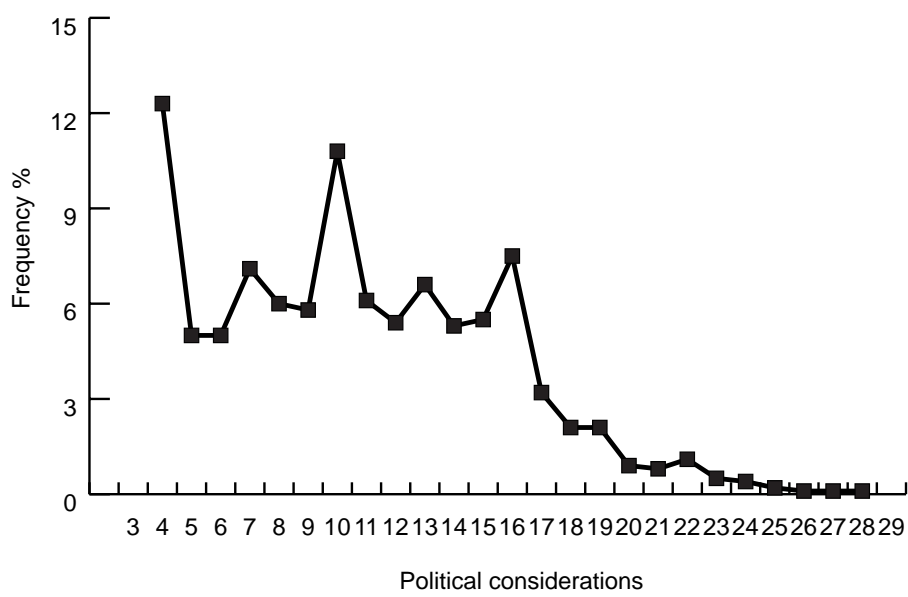
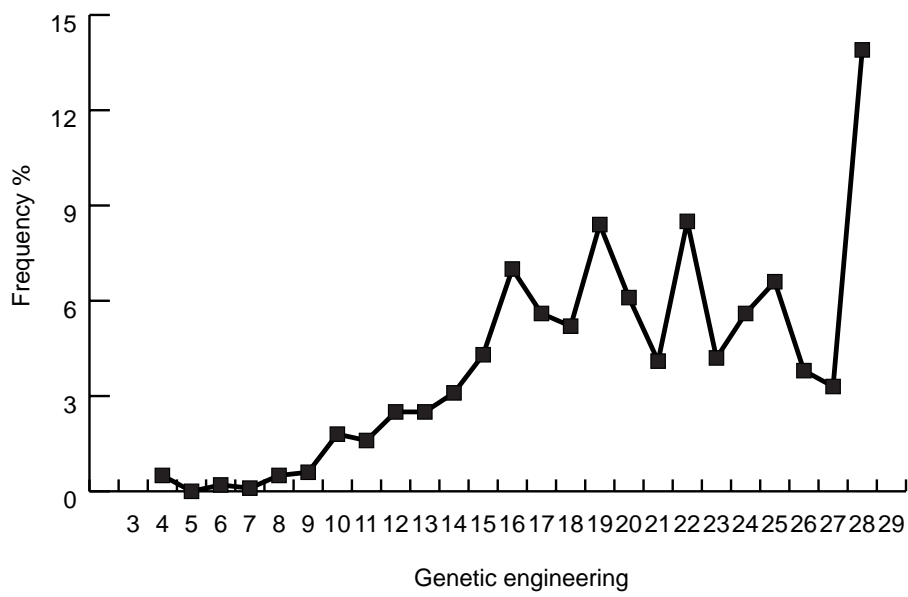
		Total population	Segment 1 The adventurous 20%	Segment 2 The conservative 26%	Segment 3 The uninvolved 16%	Segment 4 The rational 26%	Segment 5 The enthusiastic 12%
Gender	male	2%	1%	2%	4%	2%	2%
	female	98%	99%	98%	96%	98%	98%
Age	-25 years	7%	15%	0%	10%	7%	4%
	26-35 years	20%	33%	8%	26%	20%	15%
	36-45 years	17%	19%	9%	17%	22%	24%
	46-55 years	21%	18%	24%	17%	25%	19%
	56-65 years	19%	10%	30%	14%	15%	24%
	66+ years	16%	6%	30%	17%	11%	14%
	average std. dev.	49 years 15,5	41 years 14,2	59 years 13,0	46 years 16,1	47 years 14,2	51 years 14,2
Partner	no	22%	23%	26%	26%	19%	18%
	yes	78%	77%	74%	74%	81%	82%
No of persons	average	3,4	3,5	3,1	3,3	3,5	3,4
	std. dev.	1,4	1,3	1,4	1,5	1,4	1,3
Children	yes	38%	49%	23%	39%	44%	40%
	no	62%	51%	77%	61%	56%	60%
Education	none	19%	8%	38%	16%	13%	16%
	O levels	35%	23%	44%	32%	37%	39%
	A levels	36%	49%	17%	40%	41%	35%
	further ed	10%	20%	1%	13%	10%	10%
Occupation	full-time	20%	37%	6%	25%	17%	21%
	part time	5%	7%	3%	8%	5%	7%
	unemp, stud	4%	6%	3%	5%	5%	3%
	pensioner	11%	5%	18%	10%	9%	8%
	work at home	60%	45%	71%	51%	63%	61%
Partner's education	none	16%	5%	31%	17%	9%	20%
	primary	32%	21%	40%	28%	34%	33%
	secondary	38%	48%	23%	42%	42%	34%
	further	14%	26%	6%	13%	15%	12%
Household income p.a.	-100.000 ptas	39%	30%	57%	26%	37%	32%
	100.-250.000	52%	57%	39%	62%	58%	53%
	250.001+	9%	13%	5%	12%	5%	15%
Size of town	-19.999 inh	36%	27%	42%	33%	39%	37%
	20.-100.000	22%	22%	22%	22%	22%	20%
	100.-500.000	23%	28%	20%	26%	20%	21%
	500.001+	19%	23%	16%	19%	19%	21%
Region	North east	11%	11%	15%	11%	8%	9%
	East	14%	13%	13%	13%	16%	15%
	Andalusia	20%	24%	18%	17%	24%	10%
	Central	10%	9%	13%	8%	7%	13%
	North west	12%	9%	6%	8%	21%	14%
	Norht central	11%	14%	10%	15%	8%	12%
	Barcelona	10%	8%	11%	17%	7%	13%
Madrid	13%	12%	15%	11%	11%	14%	



**DIAGRAM 3. FREQUENCY DISTRIBUTION FOR THE FOUR DIMENSIONS OF THE ENVIRONMENT MODULE**

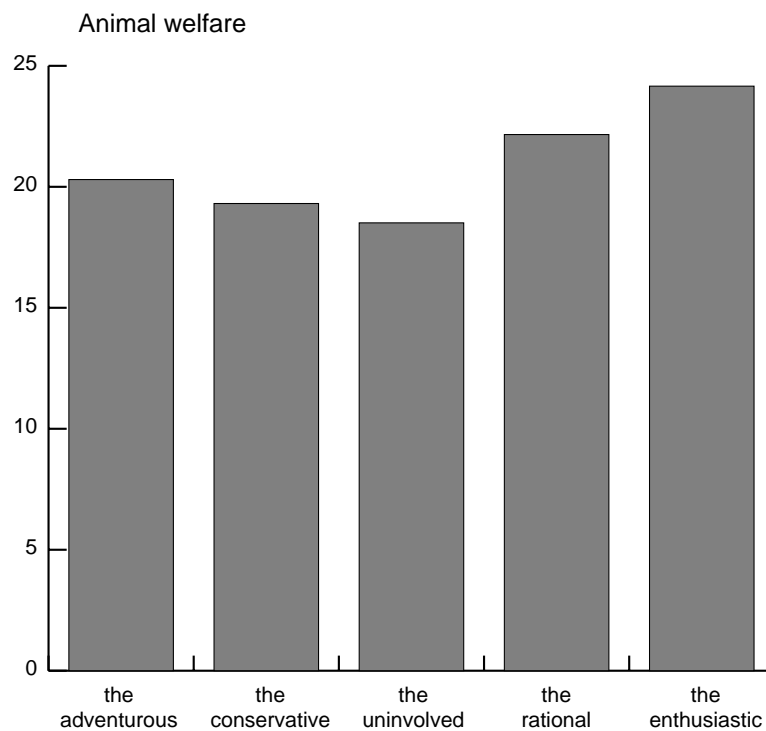
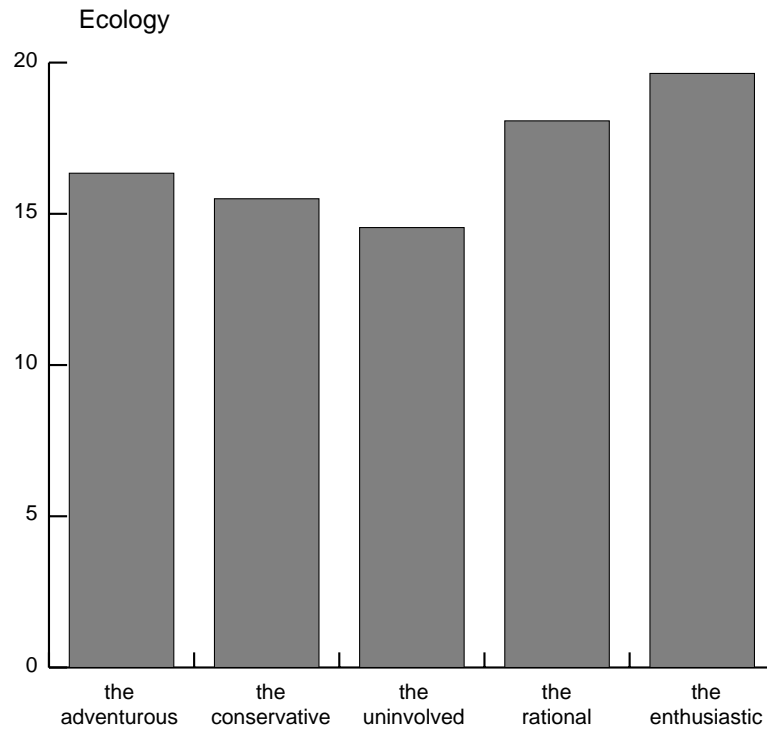
The four dimensions are measured on scales that can have values from 4 to 28. The higher the value, the more the individual consumer is interested in the dimension in question. The figures show the situation for all Spanish consumers.

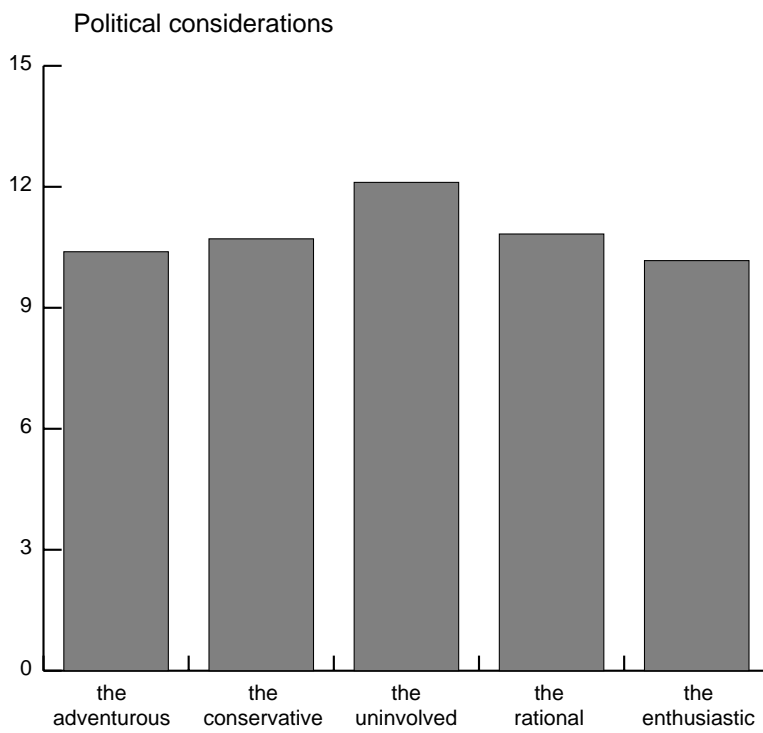
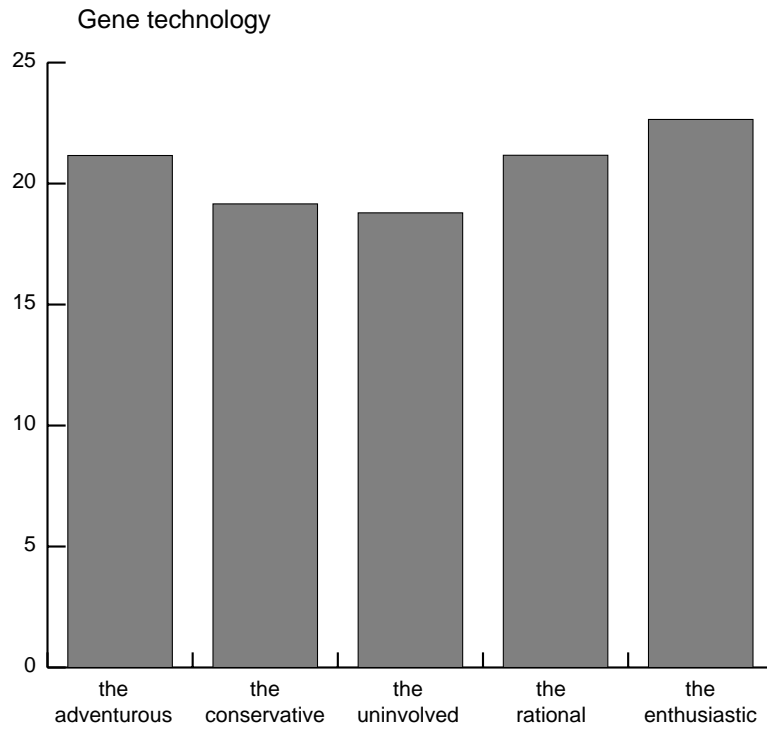




**DIAGRAM 4. RELATION BETWEEN THE FOUR DIMENSIONS OF THE ENVIRONMENT MODULE AND THE LIFESTYLE SEGMENTS**

The diagrams show the interest for each dimension distributed on lifestyle segments. The columns may have values from 4 to 28. The higher the value the higher the interest for the dimension in question.





## APPENDIX 1. REGIONAL MAP OF SPAIN

