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Food-related lifestyle (FRL) segments and the speciality foods market in Great Britain

Ashtown Food Research Centre

RESEARCH & TRAINING FOR THE FOOD INDUSTRY

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FOOD-RELATED LIFESTYLE (FRL) SEGMENTS AND THE SPECIALITY FOODS MARKET IN GREAT BRITAIN

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SUMMARY

This report deals with the speciality food orientation of British consumers. Two approaches to segmentation were taken which were related to two project objectives. Firstly, to understand the degree to which food-related lifestyle (FRL) segments identified in Great Britain in 2003 (Buckley *et al.*, 2003) are speciality orientated and secondly, to segment British consumers based on their speciality food orientation. This study provides an insight into what motivates individuals to purchase speciality foods.

The FRL questionnaire is a measuring instrument containing 69 questions regarding purchase, preparation and consumption of food. Based on their answers, consumers are then segmented into groups. The FRL approach to segmentation helps to develop a general understanding of consumers in a particular market. A reduced form of the FRL questionnaire, developed by de Boer *et al.* (2003) and which requires only 23 questions to be answered, was used in this research. For the first segmentation, this reduced questionnaire enabled the allocation of consumers to the FRL segments identified in earlier research. Additional speciality statements were constructed to assess the speciality orientation of the segments.

For the second segmentation, the set of speciality food belief statements and selected statements from the full food-related lifestyle were used to segment the British population into speciality orientated segments (SFL). Both the FRL and SFL lifestyle segments were examined according to the beliefs of consumers towards speciality foods and self-reported behaviour for speciality food purchases.

One thousand and thirty-seven respondents were interviewed with interviews restricted to only those mainly or jointly responsible for cooking and shopping in the household.

The main results were:

British food consumers were allocated into the six pre-identified FRL segments. These segments were the snacking (17% of consumers), careless (21%), uninvolved (9%), rational (24%), adventurous (17%) and conservative (12%) segments.

The adventurous and rational consumers were identified as being the most speciality orientated in their beliefs and this was also reflected in their behaviour. Thus, FRL segments differ in their beliefs and behaviours towards speciality foods.

Further segmentation using speciality-based statements identified and profiled five speciality food lifestyle (SFL) segments. These segments are the speciality foodie (18% of consumers), the foodie adopter (23%), the traditionalist (12%), the indifferent (35%) and the uninterested (12%).

The speciality foodie and the foodie adopter are the most speciality orientated. SFL segments were found to differ in their beliefs and behaviours towards speciality foods.

A practical project to apply the results with food companies is recommended. This could take the form of working with at least one speciality food company directly to develop and implement a marketing strategy which includes an FRL application.

INTRODUCTION

Consumer lifestyles are increasingly being used by marketers for segmentation due to their multi-dimensional basis for understanding behaviour. These are seen as more appropriate approaches than traditional methods such as demographics. This study uses the food-related lifestyle (FRL) segmentation and a speciality food related lifestyle segmentation (SRL) to profile the speciality orientation of British consumers.

As Britain is one of Europe's largest speciality markets, it offers substantial opportunities for Irish speciality producers. In 2003, Bord Bia predicted that together the Irish and British spend on speciality foods per annum would reach €7.5 billion by 2006 and that Irish companies' share of this market would increase to 15%. A review of the market shows that the demand for speciality food is increasing. Examples of popular speciality foods on the British market include cheese, chutney/jams, bread, relish/sauces, chocolates and cured meats.

The Irish artisan and speciality food sector is also growing. Growth of 65% is expected in this market in the ten year period between 2002 and 2012. The ten most commonly sold speciality foods in Ireland are cheese, chutney/jams, bread, relish/sauces, chocolates, cured meats, salmon, honey/syrups, cakes/pastries and yoghurt.

Murphy's (2000) definition of speciality food was used to guide this research. It encompasses the opinions of many authors on what constitutes a speciality food:

"Speciality foods are considered as products outside the mainstream possessing specific qualities, which differentiate them from standard foods. These qualities are derived from a combination of at least two of the following features:

Exclusiveness: the product is produced on a small scale and is therefore only available in limited quantities.
Processing: the product has at least undergone primary processing using non-industrial artisan techniques.
Distinctiveness: the distinctiveness of the product arises from a combination of all or some of the following attributes: extraordinary packaging, premium price, renowned origin, and / or its unique design".

OBJECTIVES

Three are two key objectives to this study. The first objective is to understand the degree to which the FRL segments previously identified in Great Britain are speciality orientated in terms of their food beliefs and behaviour. The second is to segment British consumers based on their speciality food orientation thus identifying and profiling new speciality food lifestyle segments (SFL).

METHODS

Two approaches to segmentation were taken related to these two objectives. The first dealt with general food-related lifestyles, based on the well developed FRL instrument, while the second dealt specifically with speciality food related lifestyles and was more exploratory as it is based on a new instrument developed in this research. The former is cross-culturally reliable although general, while the latter is limited to Great Britain and specific for speciality foods.

Market segmentation

A market segment consists of consumers who respond in a similar way to a given set of marketing stimuli. Each segment can have different attitudes to different product characteristics or attributes *e.g.* price, quality and advertising. One of the primary reasons for segmentation is to gather detailed information on the needs and wants of similar groups of consumers thereby allowing different segments to be more easily targeted. Segmenting a market also allows a company to increase sales resulting in increased profits, stronger control of the market so to protect against competition and makes a company more aware of their strengths, weaknesses, opportunities and threats (SWOT).

There are various segmentation instruments. The FRL is a measurement instrument that collects information on attitudes and behaviours relating to purchase, preparation and consumption of food products (Grunert *et al.*, 1996). Additionally the reduced FRL concept developed by de Boer *et al.* (2003) was applied due to its time and cost saving in segmentation of consumers into relevant FRL segments. The benefits of this measurement instrument are numerous. Firstly, the FRL helps to develop a general understanding of consumers in a particular market with regard their motivations to purchase, prepare and consume a food. It aids the assignment of consumers into different segments according to their attitudes and behaviours. It can also be used to compare consumers in different markets, for instance to detect cross-national segments and to detect consumer trends and thereby provide information to producers about new market opportunities resulting from the emergence of new consumer segments.

There are five elements or domains in the FRL instrument. The *ways of shopping* domain questions how people shop for food. It looks at attitudes to shopping and shopping lists, advertising and speciality stores. Do consumers read product labels? To what degree is price a deciding factor? Health, novelty and the price/quality relationship are addressed in the *quality aspect* domain. Social relationships, security and self-fulfilment from food are looked at in the *purchasing motive* domain. *Cooking methods* inquires as to how products purchased are transformed into meals. It looks at the consumer's desire for convenience or new ways of cooking. Is the meal planned in advance or decided at the last minute? To what extent is cooking believed to be the woman's task or is the family involved? What is expected from a meal? Do people only use foods/ingredients they are familiar with thereby allowing them a sense of security when cooking? Finally, *consumption situation* investigates the importance of meal times as a social event. Do they have dinner parties? How important is eating out?

Buckley *et al.* (2003) applied the food-related lifestyle (FRL) tool in Great Britain and identified six consumer segments in the British market, namely, the snacking consumer, the rational consumer, the adventurous consumer, the careless consumer, the uninvolved consumer and finally the conservative consumer.

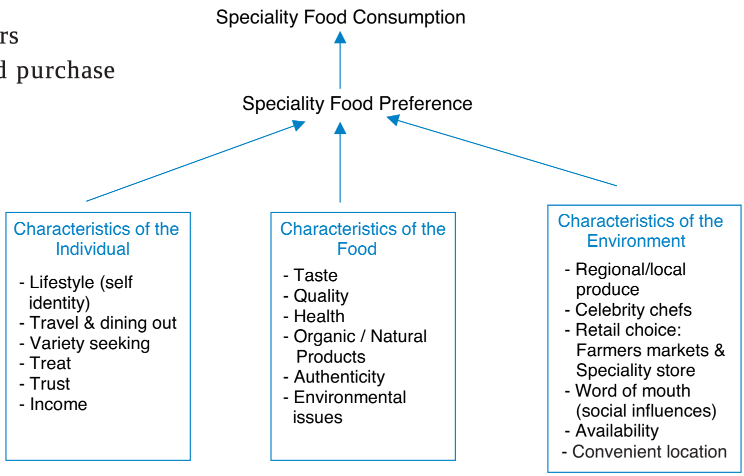
De Boer *et al.* (2003) identified the statements important for successful classification of respondents into the existing FRL segments. They reduced the number of items in the original FRL questionnaire from sixty-nine to twenty-three (using discriminant analysis). Three of the five elements in the FRL instrument, *cooking methods*, *quality* and *ways of shopping*, contain most of these statements. This reduced form of the FRL (RFRL) was then used in this research to enable allocation of consumers to the FRL segments identified by Buckley *et al.* (2003).

Speciality food beliefs

In order to satisfy the second objective, to segment the British population into speciality orientated segments, a set of speciality food belief statements was constructed. This included a mix of statements from the full food-related lifestyle questionnaire and those developed as a result of identification of the drivers of demand of speciality foods. Eighteen drivers of demand of speciality food were identified from a literature review and a market analysis. They were: taste, quality, local producers, trust, authenticity, organic production, environment, health, natural products, treat, value for money, regional produce, eating out, travel, farmers markets, speciality stores, celebrity chef and variety seeking. Two, three or four statements on each were included in the questionnaire (available on request).

These speciality statements were grouped in accordance with general categorisation suggested by Shepherd and Sparks (1994); these categories were individual, food and environment. They are summarised in Figure 1 below.

Figure 1. Factors influencing food purchase Speciality Food Consumption



Source: Randall and Sanjur (1981) in Shepherd and Sparks (1994).

Factor analysis of the statements pertaining to the individual identified two important factors, namely *trying new foods* and *value for money*. *Trying new foods* reflects upon the efforts of consumers to experiment with new foods, be it through travel, eating out or seeking variety in what they consume. *Value for money* deals with the price issues consumers may have when purchasing speciality foods.

Factor analysis of the statements on food identified a single significant factor, namely *food attributes*. This factor deals with the attributes linked to the food itself. Here the taste, quality, health, environmental, authenticity, organic and natural issues related to speciality food are addressed.

Factor analysis on the environment statements identified three major factors *retail choice*, *origin* and *celebrity chef*. *Retail choice* looks at consumer feeling towards farmers markets and speciality stores. *Origin* covers the regional or local characteristics that consumers believe speciality foods may or may not have. The final factor reflects upon the influence celebrity chefs can have on consumer beliefs regarding speciality foods.

Consumption and demography

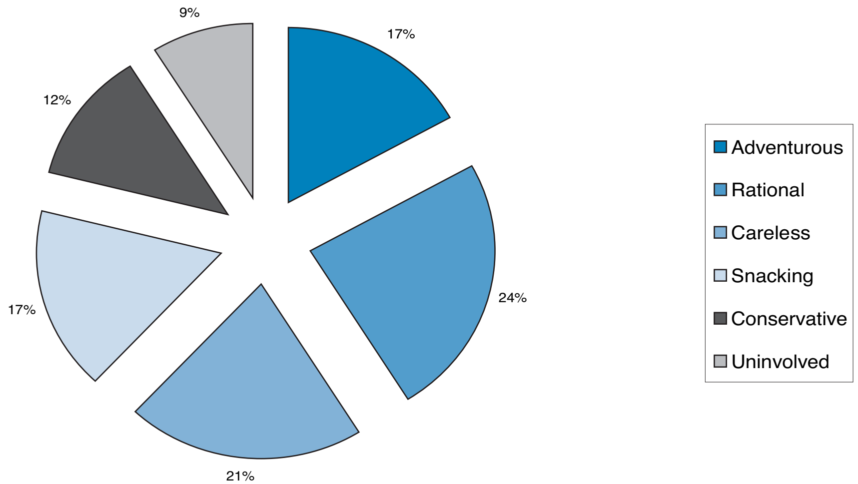
Further questions related to the type and frequency of speciality products purchased, the average weekly spend, where respondents purchased and their reasons for purchasing. These questions were used to gain extensive knowledge of the purchase behaviour of the different FRL and newly-developed SFL segments.

Demographic variables relating to age, gender, household structure, education, occupational status and income were also included. The purpose of these questions was to allow for a demographic profile of the different speciality segments.

FRL segments

Of the six FRL segments (Figure 2), four are considered more speciality orientated than the other two. These four, in descending order of speciality orientation are, the adventurous, rational, careless and snacking segments. The other two segments, the conservative and uninvolved, are not considered speciality oriented.

Figure 2. FRL segment size



Each FRL segment is described below based on the speciality dimensions and social influences. Detailed tables with significant mean ranks on which the descriptions are based, are available on request.

The adventurous: This segment is similar to the rational in their beliefs regarding speciality foods. They are more likely than the snacking, careless, conservative and uninvolved consumers to appreciate what speciality stores and farmers markets have to offer. The adventurous is more likely than the careless, conservative and uninvolved to believe speciality foods are of good and superior quality, to consider speciality foods to be authentic and to be a treat. This segment is also more likely than the careless and uninvolved segment to trust speciality foods and their producers and to agree with the link between speciality foods and local producers. Similar to the rational and careless consumer, the adventurous is more likely to use travel as an opportunity to experiment with new foods and seek variety in the foods they consume. Of all the segments, the adventurous is most interested in organic foods.

Like the rational consumer, the adventurous is more likely than the snacking, careless, conservative and uninvolved to perceive themselves as speciality food consumers. They are even significantly more likely than these four segments to think of themselves as someone interested in speciality foods. Compared to the careless, conservative and uninvolved, the adventurous consumer is more likely to feel good when serving speciality foods to their friends. One area in which the adventurous differs significantly from the rational is that they are less likely to be influenced by what others say about speciality foods or let their consumption be affected by others. These consumers are the most speciality orientated, thus, they are regular purchasers of speciality foods. Compared to the snacking, careless, conservative and uninvolved, the adventurous is the most likely to eat a speciality food within the next week. This consumer is often a well-educated female with high income.

The rational: The rational consumer is similar to the adventurous in many of their beliefs regarding speciality foods. Significantly different to the careless, snacking, conservative and uninvolved, the rational is more likely to believe speciality foods taste good and to view speciality foods as superior quality. Furthermore, this segment is significantly more likely than the careless, conservative and uninvolved to believe speciality foods are environmentally-friendly and healthy, to be authentic, to have local or regional attributes and is more likely to enjoy speciality stores. Although not significantly different, it is worth noting that after further examination there are indications that the rational is less likely than the adventurous and careless consumer to see speciality foods as value for money.

Like the adventurous, this consumer is more likely than the snacking, careless, conservative and uninvolved consumer to define themselves as a speciality food consumer. They are also more likely than the uninvolved and conservative consumers to eat a speciality food within the next week. Furthermore, they have higher intention to increase their consumption of these particular foods in the next year compared to the careless, conservative and uninvolved. This segment is more likely than the three other segments to believe that their family and important others think speciality foods are good for them. With regard to complying with the opinions of others, the rational consumers are significantly more likely than the careless, conservative and uninvolved to comply. Their consumption of speciality foods is most likely to be affected by the opinions of others. This is significant to the adventurous, careless, conservative and uninvolved. They believe serving speciality foods to their friends will make them feel good.

Second to the adventurous, this segment is considered speciality orientated. While the rational consumer reacts positively to the attributes of speciality foods, they do not necessarily feel they are good value for money. Consumers in this segment appreciate the quality of these food products and it can be said that they purchase speciality foods in a bid to impress others. They are most likely to frequent speciality stores to acquire their speciality foods.

The careless: Of the four speciality orientated segments, the careless is the least likely to perceive speciality foods as trustworthy, organic, environmentally-friendly or healthy. Compared to the rational and adventurous consumers, the careless is less likely to consider speciality foods to be of high quality, authentic, natural or a treat. Like the rational and the adventurous, the careless has a greater desire than the snacking, conservative and uninvolved consumers to search for variety in their food, to use travel as a way to experiment with unfamiliar foods and to try new foods when dining out. They are also most likely to consider that these foods offer value for money.

Of the four speciality oriented segments, the careless is the most strong-minded and non-compliant. They tend not to be influenced by the opinions of others. This consumer is reported to be a frequent user yet a light-medium spender on speciality foods. The careless consumer uses supermarkets, farmers markets and speciality stores more frequently than the sample. They also appear to use speciality foods as a regular routine, more so than the sample. This consumer is most likely to be male, aged 35-55 years, working full time with a medium-high income.

The snacking: While they are more likely than the conservative and uninvolved consumers to use travel as an opportunity to try new foods, they are significantly less likely to do so than the speciality oriented segments: the rational, adventurous and careless segments. They are also less likely than the latter three segments to seek variety in the foods they consume. The snacking consumer tends not to value the speciality store as much as the rational and the adventurous consumers. This segment is significantly more likely than the careless and the uninvolved to believe speciality foods can include organic attributes.

The snacking consumer is more likely than the conservative and uninvolved, while less likely than the adventurous and rational, to consider themselves a speciality food consumer. They tend to listen to and be influenced by the views of important others and to comply with the opinions of family and others who are important to them. In these regards they are different to the careless, conservative and uninvolved consumers.

They are infrequent users and low spenders on speciality foods. Nonetheless, the snacker has a higher than sample frequency use of speciality foods at the weekend and is more likely than the conservative and uninvolved to eat a speciality food during the week. The snacking segment has the highest proportions of those availing of convenience/local shops to purchase their speciality foods and many use local producers. The snacking consumer is likely to be a young male still in education.

The conservative and uninvolved: The two remaining segments are the conservative and uninvolved. The consumers in these segments are not identified as speciality oriented. They tend not to have positive beliefs about speciality foods and this is reflected in their purchase behaviour.

The conservative consumer is traditional when it comes to their food and less likely to view speciality foods as a treat, authentic, good tasting or high quality. They are less likely to listen to and be influenced by the views of important others or to comply with the opinions of family and others who are important to them. The conservative consumer is not a substantial purchaser of speciality foods with 39% saying they only purchase once a month. However, the segment has the highest incidence of those frequenting farmers markets.

The uninvolved consumer is considered the least speciality oriented in both their attitudes and behaviour. Compared to consumers in other segments, this segment is less likely to appreciate farmers markets, to value what the speciality stores have to offer, to believe travel, dining out and celebrity chefs can introduce them to new and unusual foods and to seek variety in their foods. This segment is most non-compliant, being less likely than the adventurous, rational, snacking and careless to feel influenced by the opinions of others. The uninvolved consumer is not considered a sizeable purchaser of speciality foods, thus they have the highest frequency of those reported to never purchase speciality foods. However, when they do spend, it is generally in supermarkets.

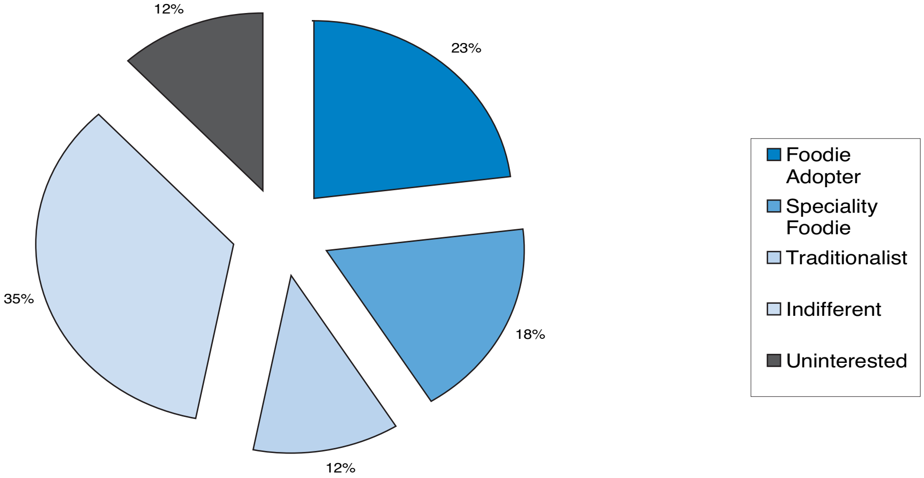
Having described the speciality orientation of the FRL segments, a description of the SFL segments now follow.

Speciality food lifestyle (SFL) segments

Five speciality food lifestyle (SFL) segments were identified - namely the foodie adopter (23%), the speciality foodie (18%), the traditionalist (12%), the indifferent (35%) and the uninterested consumer (12%). (Figure 3)

Each segment below is described based on the five speciality dimensions and social influences. Detailed tables with significant mean ranks on which the descriptions are based are available on request.

Figure 3: SFL segment size



The speciality foodie: This consumer is more likely than the traditionalist, the indifferent and the uninterested to consider themselves a speciality food consumer or someone interested in speciality foods. Of all the segments, they are the most inclined to view speciality foods as good value for money and, after the foodie adopter, are likely to try new and unfamiliar foods. This segment of consumers reacts more positively to the expertise, atmosphere and products available at farmers markets and speciality stores than the indifferent and the uninterested consumers. The speciality foodie is similar to the traditionalist in their beliefs that celebrity chefs are helping to promote and demonstrate the use of speciality foods.

Apart from the foodie adopter, the speciality foodie places more importance on serving speciality foods to their friends in order to feel good. This consumer is more influenced by what others say about speciality foods and is more likely to believe their consumption of these foods is affected by other people's opinions.

The speciality foodie is the most regular buyer of speciality foods. They are a heavy spender with over half of the consumers in this group purchasing speciality foods weekly or more frequently and then using these foods as a regular routine. The highest number of those frequenting farmers markets and local producers to purchase their speciality foods are found in this segment. The speciality foodie holds the greatest proportion of those who use speciality foods for entertaining at home or as gifts. The reported frequencies also illustrates above sample use of speciality foods as part of traditional/ethnic cooking.

The foodie adopter: Compared to the other four segments, the foodie adopter is the most likely to experiment with new foods. They like to seek variety in what they consume, try new foods when travelling or dining out and react positively to the influence of celebrity chefs on the popularity of speciality foods. The foodie adopter is more likely than any other segment to believe speciality foods have local or regional attributes and to take pleasure from what the farmers markets and speciality stores have to offer. They value the products and expert advice offered at these retail outlets. Consumers in this segment are more likely than the speciality foodie, the indifferent and the uninterested to have positive beliefs regarding the food attributes of speciality foods. They perceive speciality foods as being healthy, natural, superior tasting, environmentally-friendly, authentic and better quality. However, the foodie adopter is significantly less likely than the speciality foodie and the indifferent to believe that speciality foods are good value for money.

Like the speciality foodie, the foodie adopter is more likely than the remaining three segments to consider themselves a speciality food consumer. The foodie adopter group includes consumers who are the most likely of all to be influenced by what others say about speciality foods.

The foodie adopter is likely to be a frequent and heavy spender on speciality food. This segment contains the highest proportion of people purchasing speciality foods for indulgence, cooking and use at the weekends.

The traditionalist: This segment is generally traditional in their beliefs towards food and they are least likely of all the segments to try new and unfamiliar foods. They have the least tendency to use travel and eating out as an opportunity to experiment with new foods but react positively to the attributes of speciality food. They tend to believe speciality foods are healthy, environmentally-friendly, natural, superior tasting, authentic and better quality. This consumer shows greater appreciation than the indifferent and the uninterested consumers for the products and services offered at retail outlets such as farmers markets and speciality stores. The traditionalist consumers consider speciality foods to have regional or local attributes. The traditionalist is also more positive than the indifferent and the uninterested in their beliefs that celebrity chefs are increasing the profile of speciality foods.

The traditionalist is less likely than the foodie adopter and speciality foodie to describe themselves as a speciality food consumer but more are likely to believe that their family and important others think consuming speciality foods is good for them. More so than the uninterested, the traditionalist can be influenced by what others say about speciality foods.

This traditional consumer is considered an infrequent user of speciality food and is perceived as a light spender. Interestingly, the traditionalist has the highest incidence of those visiting convenience/local stores and farmers markets. This segment includes above population frequencies of those using speciality foods at the weekends and as part of traditional or ethnic cooking but the lowest incidence of those using speciality foods for indulgence or gifting

The Indifferent: This segment is more likely than the traditionalist and the uninterested to seek variety in the foods they consume and experiment with new foods when eating out or travelling. The indifferent consumer is significantly more likely to see speciality foods as good value for money than the foodie adopter, the traditionalist and the uninterested. Not unlike the uninterested, this segment is least likely to perceive speciality foods as having positive food characteristics such as health, naturalness and superior quality and to believe speciality foods are of local or regional origin. The indifferent consumer is more likely than the uninterested, yet less likely than the foodie adopter, speciality foodie and traditionalist, to appreciate the products and atmosphere associated with the speciality stores and farmers market. Other than the uninterested, the indifferent is not as likely as other segments to think celebrity chefs are helping to demonstrate the use of and promote speciality foods.

The indifferent consumer is less likely than most others to be compliant with regard to their families' opinion on what foods they should eat. This segment is a less frequent purchaser of and spender on speciality foods. When asked where they purchase speciality foods most often, the indifferent consumer is reported to use supermarkets and convenience/local shops more than the sample. They have the lowest frequency of those using farmers markets. Their reported reasons for purchasing speciality foods are indulgence and entertaining at home.

The uninterested consumer: These consumers are generally uninterested in food or anything related. They are the least speciality orientated in their beliefs. They have the lowest desire to try new foods, be it when travelling or dining out, to seek variety in food and tend not to react positively to food attributes of speciality foods. This segment of consumers is less likely than the speciality foodie and the indifferent segment to perceive speciality foods as good value for money. Similar to the indifferent consumers, the uninterested are the least likely to believe speciality foods have regional or local characteristics and, of all the segments, are least likely to appreciate the farmers markets and speciality stores.

The uninterested consumer could be described as a non-complier as they have the lowest tendency to comply with important others' or family's opinions. The uninterested consumer is not regarded as a substantial purchaser of speciality foods but will frequent supermarkets most often to acquire their speciality foods.

Significant differences were established between the five segments across the beliefs, behaviours and demographic characteristics.

DISCUSSION

FRL segments

The adventurous segment is the most speciality orientated. They are educated consumers who appreciate the qualities of speciality foods; therefore, highlighting product attributes is recommended to attract their attention. This group is interested in trying new foods when travelling so there is an opportunity to market foods from other cultures. It is also useful to know that the adventurous consumer likes to seek variety. Extending product ranges would possibly attract this consumer. Promoting foods that can be used as part of everyday consumption and cooking routine is also suggested.

Promotions, such as 'buy one get one free' may entice the rational consumer to purchase. Emphasising the attributes of the food may also attract their attention. Promotion of gifts sets could be targeted towards the rational consumer because of their use of speciality foods as gifts and to impress others. Approaches likely to reflect positively on the success of a product include promoting the use of foods suitable for dinner parties and entertaining at home. Advertising should be considered as this group appears to listen and be easily influenced.

The careless consumer is somewhat carefree in their beliefs towards food. This consumer likes to seek variety so developing new varieties of products may draw their attention. They like trying new foods through travel so ethnic

foods could be aimed at them. When targeting the careless consumer, it is important to know that their primary use of these foods is for indulgence.
While the snacking consumer is considered speciality oriented, convenience is more important when purchasing. Quick, easy and hassle-free solutions are what this consumer is searching for. Speciality foods aimed at this consumer should be available in convenience stores as this is where they are reported to purchase most of these foods. Individual portion sizes are recommended. It should also be clear that this consumer is not necessarily interested in seeking variety. They view speciality foods as value for money so there is an opportunity to charge a premium for these products.

It may be difficult to encourage the conservative consumer to purchase speciality foods. However, promoting speciality foods as traditional and wholesome may attract the attention of the conservative consumer. If targeting this group, producers could place their products at farmers markets.

It is a challenge to attract the attention of the uninvolved consumer to the speciality food sector. Due to their negative beliefs towards speciality foods the likelihood is that any purchases of these foods are accidental. This consumer is possibly looking for convenient solutions. Advertising or promotions would be wasted on the uninvolved consumer.

SFL segments

The most speciality oriented of all the SFL segments are the speciality foodie and the foodie adopter. For the speciality foodie, emphasising product attributes will tempt this consumer. Additionally, as the speciality foodie perceives speciality foods as good value for money, there is an opportunity to charge a premium price. To this segment of consumers, variety in what they eat is important so there is scope to test new products on them or extend product ranges. Using celebrity chefs to promote speciality foods is also a viable marketing idea for companies.
The foodie adopter is also highly speciality oriented. Likely to increase their consumption of speciality foods, there are openings to offer new foods or new

varieties to this consumer since they like to seek variety. They also like to try new foods when travelling so ethnic foods are also an option. Due to their interest in regional and local foods, stressing the origin of products may entice this consumer to purchase. Promotions and gift sets will also attract the foodie adopter, as they are less likely to see speciality foods as value for money.

As the name suggests, the traditional consumer is conventional in their beliefs towards food. This consumer is not concerned with seeking variety or trying new foods so novel or new variety products are not viable. They have however strong beliefs regarding the attributes of speciality foods so marketing these attributes may encourage more purchases. Promoting speciality foods as traditional and wholesome may attract the attention of the conservative and traditional consumer. Emphasising the origin of the products may also lure this consumer.

Those with little speciality interest are found in the indifferent segment. This segment of consumers is less concerned with the attributes of speciality food so it is necessary to attract their attention through other means. The indifferent consumer expresses some interest in trying new foods so new products or varieties could be targeted at this group. Due to their curiosity about unfamiliar foods when travelling, products from other cultures (ethnic foods) may also be a possibility. This segment is not likely to increase their consumption of these foods in the coming years so there may not be an abundance of opportunities for companies where the indifferent consumer is concerned.

The uninterested consumer is considered the least speciality oriented of all. They do not like experimenting with unfamiliar foods so new or extended product ranges are not a feasible option. As they feel speciality foods are not good value, promotions and low value offerings may draw their attention. The likelihood of this consumer increasing their overall consumption is low so there may not be much scope for Irish speciality food companies to increase sales through this segment.

CONCLUSION

The objective for this first part of analysis was to establish the speciality orientation of the FRL segments identified in 2003. The six FRL segments were analysed for their beliefs and behaviours towards speciality foods. Four were found to be speciality oriented: the adventurous, rational, snacking and careless segments. The conservative and uninvolved are not identified as speciality oriented segments due to their lack of interest in and purchasing of speciality foods.

This research also segmented the British consumers based on their speciality opinions and identified five speciality food lifestyle (SFL) segments: the speciality foodie, food adopter, the traditionalist, indifferent and uninterested segments. Two segments, the speciality foodie and the foodie adopter, are the most speciality oriented. The traditionalists also have an interest in speciality foods while the indifferent and uninterested are unlikely to provide market opportunities for companies in the sector.

Both approaches have their merits and companies can use either to assist in development of their marketing strategies. Although more general, the FRL has a well-developed theoretical base while the SFL deals specifically with speciality foods.

RECOMMENDATIONS FOR FUTURE RESEARCH

1. Development of a relationship with food companies through a practical project to apply the results. This could take the form of working with at least one speciality food company directly to develop and implement a marketing strategy which includes an FRL application.

2. Duplication of this research on the speciality food market in other countries. This would allow for comparison of markets.

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