

Future trends and consumer lifestyles with regard to meat consumption ☆

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Abstract

Using the food-related lifestyle model as a conceptual framework, one possible trend each is discussed for the following four components of food-related lifestyle: quality aspects, ways of shopping, cooking methods, and purchase motives. These trends refer to the increasing use of extrinsic cues in quality perception, shopping fast and easy vs. shopping in specialized outlets, the role of convenience and meat avoidance in cooking, and the role of concerns about the meat production process in purchasing. Indicators for each of these trends are discussed.

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1. Meat and changes in the way we eat

The way we eat is changing. Everybody is talking about it. There is a steady stream of conferences and lectures on the consumer of the future, on trends in food consumption, about the rapid changes in consumer demand, about the need for innovation of food producers as a way to survive. Major topics mentioned in this context are usually health concern, the role of convenience, the importance of variety and new experiences, linking ‘stories’ to food, ethical and environmental issues.

Meat is (still) a central element in our eating, and the role of meat has therefore been also prominently discussed when talking about food trends. In addition to meat’s prominence as a meal component, this has been fuelled by changes in meat consumption, changes in the way meat consumption is distributed across different kinds of meat, and purported changes in attitudes to meat, often linked to meat-related food scares like BSE (Smith, Young, &

Gibson, 1999) and the Belgian dioxin crisis (Verbeke, 2001). All of the topics above have thus also been discussed in the context of meat (e.g., Becker, Benner, & Glitsch, 2000; Hughes, 1995; McEachern & Warnaby, 2004; Resurreccion, 2004; Verbeke, 2000).

The fluctuations in meat demand are undisputable, though their pattern, when comparing across countries, is far from clear. As for most other ‘trends’, the evidence is much more equivocal and sometimes anecdotal. While we do have a growth of convenience products, we also have a slow food movement and a growth in the sales of kitchens and cookbooks. While there is considerable evidence of people’s health concern, their eating habits do not seem to become healthier. In spite of considerable discussion on organic production and animal welfare, the market shares of products positioned accordingly remain small (e.g., Willer & Yussefi, 2006). And a recent, comprehensive study on meal patterns in the Nordic countries showed that, in spite of all talk about the breakdown of traditional meal patterns, by far most meals follow the traditional patterns and do assemble the family (Kjærnes, 2001).

In this paper, I will therefore choose a cautious approach to identify ‘trends’ in consumer lifestyles with regard to meat. I will use the next section to discuss how

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a ‘lifestyle trend’ can be defined, and which type of evidence we can use as indicators for such trends when the ultimate proof, namely changes in longitudinal data, is not available. I will then discuss four areas where I believe there is reason to believe that we are in the middle of trend-like developments of relevance for the production, processing, marketing and consumption of meat.

2. Lifestyle trends and ways to assess them

What is a lifestyle? The lifestyle construct has a long-standing history in marketing research. First introduced by Lazer (1964), it was mainly used as an umbrella term for the measurement of arbitrary assortments of “activities, interests and opinions” by means of questionnaires (AIO; Wells & Tigert, 1971) by which marketing researchers sought to describe how consumer segments differed from each other. The vagueness of such a definition has annoyed many marketing scholars over the years (e.g., Anderson & Golden, 1984; Lastovicka, 1982). Also, it has been argued that in today’s world people’s lifestyles need not be consistent across different life domains, and that attempts to describe lifestyles – and changes in them – should therefore be restricted to certain life domains, like for example food (van Raaij & Verhallen, 1994). In an attempt to live up to the demands for both a better theoretical foundation and domain-specificity, (Brunso & Grunert, 1998; Grunert, Brunso, Bredahl, & Bech, 2001) have proposed the concept of food-related lifestyle. Lifestyle is here defined as the intermediate level of a hierarchical cognitive system. On the top level of their hierarchy, personal values are defined as abstract, transsituationally aggregated cognitive categories – for example hedonism, self-direction or tradition. On the bottom level, product perceptions are defined as situation-specific input to a categorization process – for example the perception of a range of meat products in a shop. Life-

style is then defined as an intervening system of cognitive structures that link situation-specific product perceptions to increasingly abstract cognitive categories and finally to personal values. Five elements of food-related lifestyle have been distinguished: purchase motives, ways of shopping, quality aspects, cooking methods, and consumption situations (see Fig. 1). This concept of lifestyle has been applied widely in food research (Brunso, Scholderer, & Grunert, 2004a, 2004b; Brunso & Grunert, 1998; de Boer, McCarthy, Cowan, & Ryan, 2004; Grunert & Ramus, 2005; Hoek, Luning, Stafleu, & de Graaf, 2004; Kennedy, Jackson, Cowan, David, & Bolton, 2005; Kesic & Piri-Rajh, 2003; Lea & Worsley, 2005; Nijmeijer, Worsley, & Astill, 2004; O’Sullivan, Scholderer, & Cowan, 2005; Scholderer, Brunso, Bredahl, & Grunert, 2004a; Shim & Lotz, 2001).

Lifestyle, defined in this way, mediates between values and the environment. Human values are commonly assumed to be stable and change only very slowly. Our perception of the environment, on the other hand, is highly variable and situation-specific. Our lifestyle is thus an attempt to adapt our behaviour in such a way that we try to achieve the same basic values throughout our life, even though the environment in which we live is changing. Therefore, lifestyles change over time, not frantically or randomly, but in systematic ways that we can interpret as attempts to maintain the balance between changes in the environment and our own value system. Therefore, it makes sense to speak about trends in lifestyles.

The best way to get insight into trends in lifestyles would be to have longitudinal data, where the same lifestyle indicators are measured repeatedly across time. In by far most cases, such data are not available, and we have to seek for second best solutions. Fortunately, the toolbox of market research contains a number of instruments that can provide indicators of potential lifestyle changes. One group of methods is based on putting people into environments that

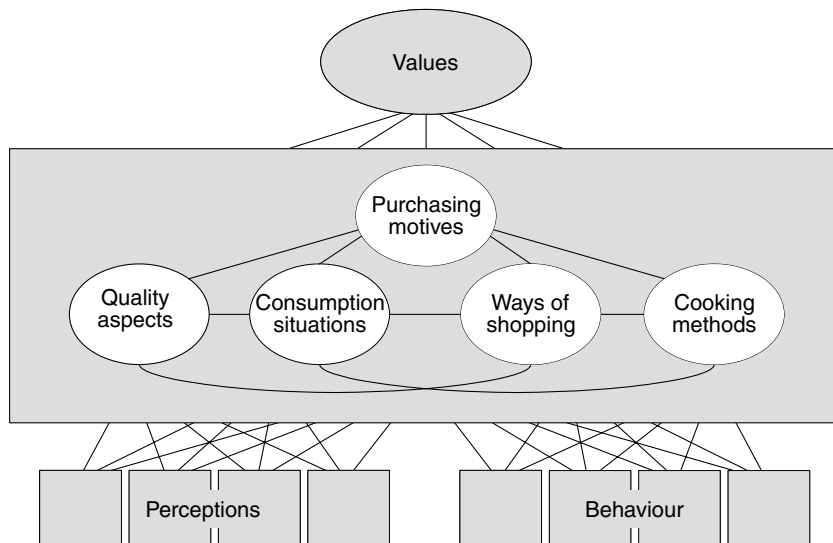


Fig. 1. The food-related lifestyle model.

provoke behavioural reactions that do not occur in the current marketplace (for example, because the type of product we are interested in does not yet exist), but that could result from the introduction of new, yet unknown products. The reasoning behind this is that consumers are usually not very good at predicting their own behaviour under new, unfamiliar circumstances, but react in predictable and systematic ways when put into an innovative context requiring new types of behavioural response. This reasoning has been applied most thoroughly in the so-called information acceleration approach (Urban, Weinberg, & Hauser, 1996, 1997), but other experimental approaches putting consumers into novel contexts and measuring their responses can be used in a similar vein. Another group of methods of some interest here is the so-called lead-user approach. *Lead users* is a concept introduced by innovation researcher von Hippel (Urban & von Hippel, 1988; von Hippel, 1986), who noticed that in many markets there are groups of customers who are ahead of the mainstream market in terms of certain trends, which in turn leads to that these customers use existing products in innovative ways and sometimes even modify or adapt products on their own. The *lead user method* (Herstatt & von Hippel, 1992) consequently aims at identifying lead user groups and making the specific traits of these people useful in the development of new products. When looking for trend indicators, studying potential lead users may give valuable insights that cannot be obtained by studying the mass market.

In the present paper, I will eclectically draw on research results obtained in a wide variety of ways, whenever I think they can shed light on a potential lifestyle change. In the light of the above, however, I have especially looked for results obtained using experimental methods in consumer research, and I have looked for research that can be interpreted from the lead user perspective, even when that perspective was not actively invoked. I have especially looked at studies dealing with consumers who have reduced their meat consumption, consumers who are or want to become vegetarians, and consumers who buy meat substitutes. Whether these groups constitute lead users in any sense is certainly debatable, but results from researching these groups are certainly inspirational with regard to possible lifestyle trends.

3. Four areas of change

As noted above, I will draw on the food-related lifestyle concept in order to identify possible areas of lifestyle change. Food-related lifestyle consists of five components: ways of shopping, quality aspects, cooking methods, consumption situations, and purchase motives. In the following, I will go through these, identify one or two possible trends for each of them, and review some evidence. I will combine the cooking methods/consumption situations components, because the potential changes I want to look at there span over both of these components.

3.1. Quality aspects: rising importance of extrinsic cues?

We know a good deal today about how consumers perceive meat quality (Brunso, Bredahl, Grunert, & Scholderer, 2005; Grunert, 1997, 2005; Grunert & Bech-Larsen, 2004). We know that perceived quality is multidimensional, and that the main dimensions are sensory quality, healthiness, convenience, and – for some consumers – process characteristics like animal welfare and organic production. We know that these qualities are mostly unknown to the consumer at the point of purchase, and are therefore inferred based on the information available – usually called *quality cues*. It is common in the quality perception literature to distinguish between two types of cues: intrinsic (cues that are part of the physical product, like its appearance) and extrinsic (everything else). We understand at least partly the mechanisms guiding the selection of cues by consumers to infer quality, namely cue selection based on diagnosticity (how predictive is the cue of the quality of interest) and accessibility (how familiar am I with the cue, so that I can make the right inferences, Dick, Chakravarti, & Biehal, 1990, see also Cox, 1967).

Quality perception of meat has traditionally been largely based on intrinsic cues like the colour of the meat, the visible fat and the cut. This is not mainly because consumers have been very competent in inferring quality from these cues (some studies suggest the opposite, see, e.g., Bredahl, Grunert, & Fertin, 1998; Brunso et al., 2005), but because fresh meat is a largely unbranded product, and only few extrinsic cues were available. The major exceptions have been the place of purchase, where consumers tend to believe that meat bought from a butcher is better than meat bought from a supermarket, and the origin of the meat, where meat of domestic origin is widely believed to be better (e.g., Becker et al., 2000; Bernués, Olaizola, & Corcoran, 2003; Glitsch, 2000; Grunert, 1997).

There is a widespread opinion, though, that the use of extrinsic cues for quality inference is and will be increasing (e.g., Bernués et al., 2003). There are two arguments for this development. One is linked to changed weights of the traditional dimensions when evaluating meat quality. Fuelled by the general debate on food and health, by the discussion about pros and cons of eating red meat, and not least by the various meat scandals, consumers attach more importance to issues related to health and safety, and to process characteristics assumed to be related to health and safety. Health and safety are credence characteristics and not easily inferred from intrinsic cues, so interest in health and safety issues may fuel an increased use of extrinsic quality cues.

The second argument is quite different: It is related to the general “trend” arguing that consumers are increasingly interested in ‘stories’ being linked to physical products, creating consumption experiences that extend beyond the basic functions of the product (e.g., Jensen, 1999). While this argument is not specific to meat and

not even to food, food examples like free range eggs have been used as evidence for the phenomenon.

A study from 2002 with samples of German consumers (Grunert, Skytte, Esbjerg, Poulsen, & Hviid, 2002) provides some support for the first argument. Consumers discussed meat quality in focus groups and had also to formulate wishes for additional information. Results showed that consumers were confident that they could judge the sensory quality of the meat themselves, or that at least additional information was not expected to be of any help in judging sensory quality, but they could easily imagine that additional information could be valuable in terms of evaluating other, mainly health- and process-oriented quality dimensions. Another consumer sample was presented with a list of 22 potential extrinsic cues on pork, most of them not currently available, and was asked to (a) indicate whether they thought they understood what the cue was all about, (b) rank order the cues they understood by perceived importance for making meat purchases, and (c) to indicate, for the five most important cues, reasons for the perceived importance by applying the *laddering* interview method (Grunert & Grunert, 1995). Results can be seen in Figs. 2 and 3.

We see that of the top 5 extrinsic cues (as measured by both knowledge and importance), none of them is related to sensory quality – they are, instead, related to healthiness and process characteristics, in line with the first argument presented above.

Why, then, is that type of information not appearing in the marketplace? One possible explanation is that expressed demand for certain types of information does

not necessarily mean that such information will actually be used once available, so there may be no trend here after all. We will return to this in the next section. However, there may be a number of other reasons why the trend, if it exists, has not become all too visible.

First, extrinsic cues, if they are to be used, have not only to be available, they also have to come from a credible source. Studies on the credibility of product information have consistently shown that producers rank lowest in terms of credibility, followed by large format retailers, butchers, and consumer organizations (the ranking of governmental organizations differs between countries, see, for example, Poppe & Kjærnes, 2003). Second, even when ignoring the credibility issue it is not entirely clear who the sender is supposed to be. Meat (at least fresh meat) is still largely an unbranded product, so there is no obvious dominant actor in the distribution channel who would take the lead in making this type of information available. Retailers, who have embarked on some branding and quality assurance schemes in the wake of the BSE crisis, may be one candidate. Smaller niche producers, who brand their meat based on geographical origin, may be a second.

Which brings us back to the second argument about an increasing use of external cues, namely when these are used to back up a ‘story’ on the production process. The current examples where we come closest to ‘storytelling’ about meat at present are probably extensions of the long-standing interest in the origin of the meat. The origin cue is used to make a whole range of inferences about meat quality, spanning all the major quality dimensions (Hoffmann,

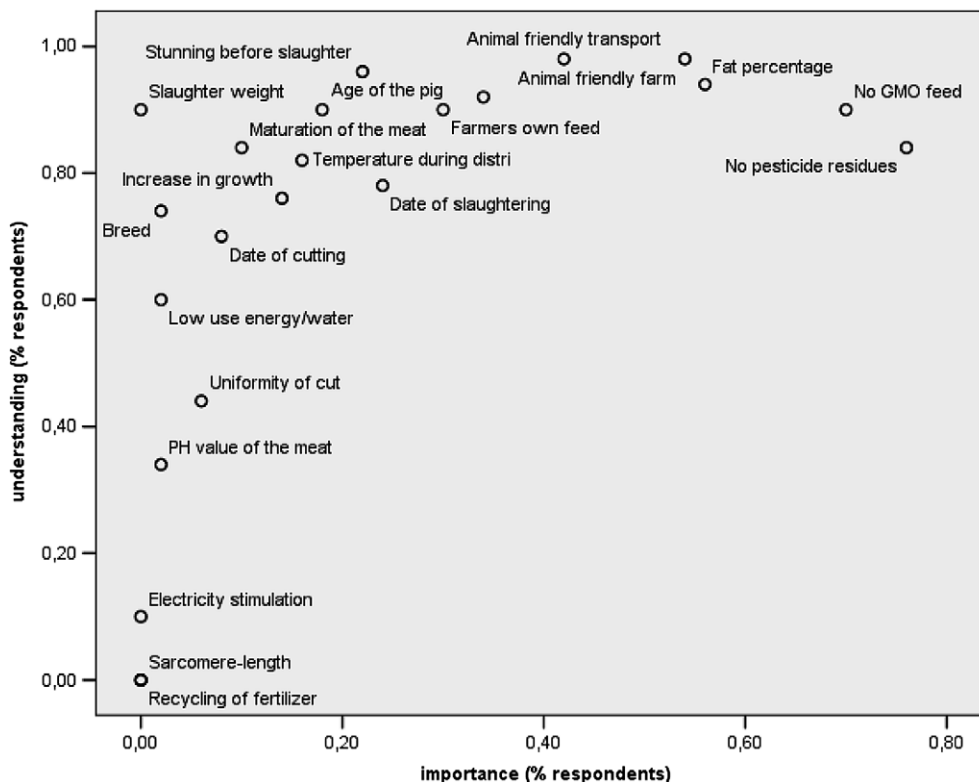


Fig. 2. Understanding and importance of 22 extrinsic pork cues (from Grunert et al., 2002, German sample, $n = 50$).

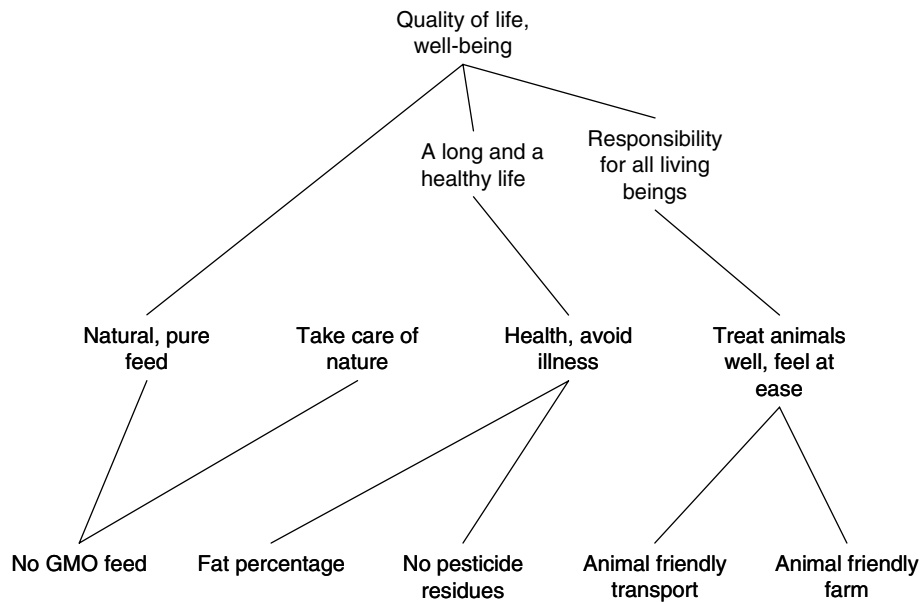


Fig. 3. Inferences from most important extrinsic cues (from Grunert et al., 2002, German sample, $n = 50$).

2000), and it may appear natural to take this as a starting point for stories about meat-based products. As an example, Roininen, Arvola, and Lähteenmäki (2006) have studied consumer associations to 'local' meat products in Finland and found that the notion of short distances from production to consumption is viewed as being associated with a wide range of quality inferences, but also that the idea of local production itself is sympathetic, irrespective of what it means for the quality (in the sense of sensory quality) of the product.

Once an extrinsic cue is firmly established in the mind of the consumer, the effects on quality perception can be quite dramatic. Both country of origin and organic production have been shown to have halo effects with regard to quality perception, meaning that consumers tend to believe that, for example, an organically produced piece of meat is better not only in terms of its process characteristics, but also in terms of healthiness and sensory quality (see, e.g., Hoffmann, 2000, for origin effects, and Scholderer, Nielsen, Bredahl, Claudi-Magnussen, & Lindahl, 2004b, for effects of outdoor pig production). When differences between the physical properties of meat alternatives are not too big, the quality inferences from extrinsic cues may be upheld even in the light of potentially disconfirming experience. Scholderer et al. (2004b) measured both expected and experienced quality of pork chops in a completely balanced design, where both actual type of production (conventional vs. organic) and extrinsic cues available to consumers (none/conventional/free-range/organic) were varied. The results can be seen in Fig. 4. While actual meat type had a small, but significant effect on 3 out of 4 dimensions of experienced quality (after tasting samples), with the organic meat receiving scores that were a little lower, the extrinsic cue on the production method had a considerably larger, opposite effect, so that consumers believing that they tasted organic or free-range pork actually perceived

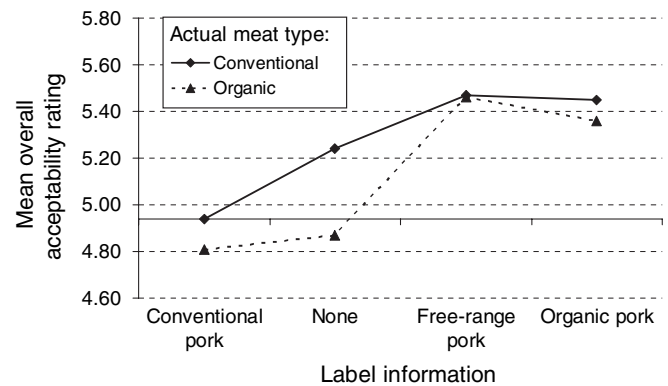


Fig. 4. Experienced overall quality perception based on meat type and label information (adapted from Scholderer et al., 2004a, 2004b, Danish sample, $n = 185$).

the quality of the meat as higher, irrespective of which type of meat they actually ate. Similarly, McIlveen and Buchanan (2001) demonstrated that information on the point of purchase – a butcher, a low and a high quality supermarket – affected the sensory evaluation of meat samples.

Our tentative conclusion is therefore that extrinsic cues have a considerable potential for playing a larger role in the way in which consumers perceive meat quality. First, two of them – origin of the meat and place of purchase – have a long history of influencing consumer quality perception. Secondly, there is evidence that consumers themselves believe that they want more of this type of information. Third, more use of extrinsic cues is in line with a development towards products that can tell a 'story.' Fourth, in situations where the physical differences between alternative products are small, the quality inferences made on the basis of these cues may be so strong that consumers keep on adhering to them even in the light of evidence that may point into another direction. The fact that such cues are

not yet widely available on the marketplace may be more due to difficulties on the supply side than to a lack of consumer interest.

3.2. Ways of shopping: still fast and easy?

In a widely cited study of the way consumers shop for their daily purchases in supermarkets, Dickson and Sawyer (1990) found that the average time between arriving at and departing from a product category display was less than 12 seconds, that 42% of shoppers spent five seconds or less, that 25% spent more than 15 seconds, and that in 85% of the cases only the chosen product was handled. The study also showed that many shoppers had only vague and inaccurate ideas of the prices of the products they were buying; a finding that has been validated many times after in a range of studies both in the US and in Europe (see Vanhulle & Drèze, 2002, for the most recent study with references to many earlier ones).

One can wonder how consumers can survive economically, given this level of haste and ignorance. One can also argue that this fast and easy way of decision-making is probably the only way for consumers to survive in an information-overloaded shopping environment, and given the many choices to make and the time pressure under which a good deal of shopping occurs.

We can also wonder what these findings mean in the light of the tentative ‘trend’ identified in the preceding section. Even if more extrinsic cues become available, how will consumers ever find the time to look at them and process

them? How will they even notice that they become available, given the haste with which they seem to run through the supermarket?

Fresh meat was not one of the categories investigated in this group of studies, and in addition they all concentrated on the price parameter and not on quality cues. And given the speed at which decision-making in the consumer market occurs, it is not easy to investigate cue usage in the field. A simulated shopping environment that retains some of the informational characteristics of supermarkets and also the usual time pressure, but makes the information processing transparent at the same time, may therefore be a promising solution. Fig. 5 shows a screen from a computer-based shopping simulation. Respondents had to choose between four packs of pork chops, shown by pictures on the screen. Certain information on these pork chops was available – price, origin, animal welfare in the production process, guarantees for the absence of pesticide residues in the meat – all four extrinsic quality cues. In order to obtain this information, respondents had to click with mouse on the ‘pack’, which would make the information visible for a few seconds. Respondents could also choose to put packs ‘away’ (remove them from the screen). They had to choose one of the packs under simulated time pressure, as visualized by a running 45 seconds time bar. Respondents repeated this procedure six times. The whole procedure was designed so as to simulate the way consumers can obtain information by taking up and handling packs of meat. The pictorial stimuli and the four cues were generated from an underlying factorial design, so that utilities

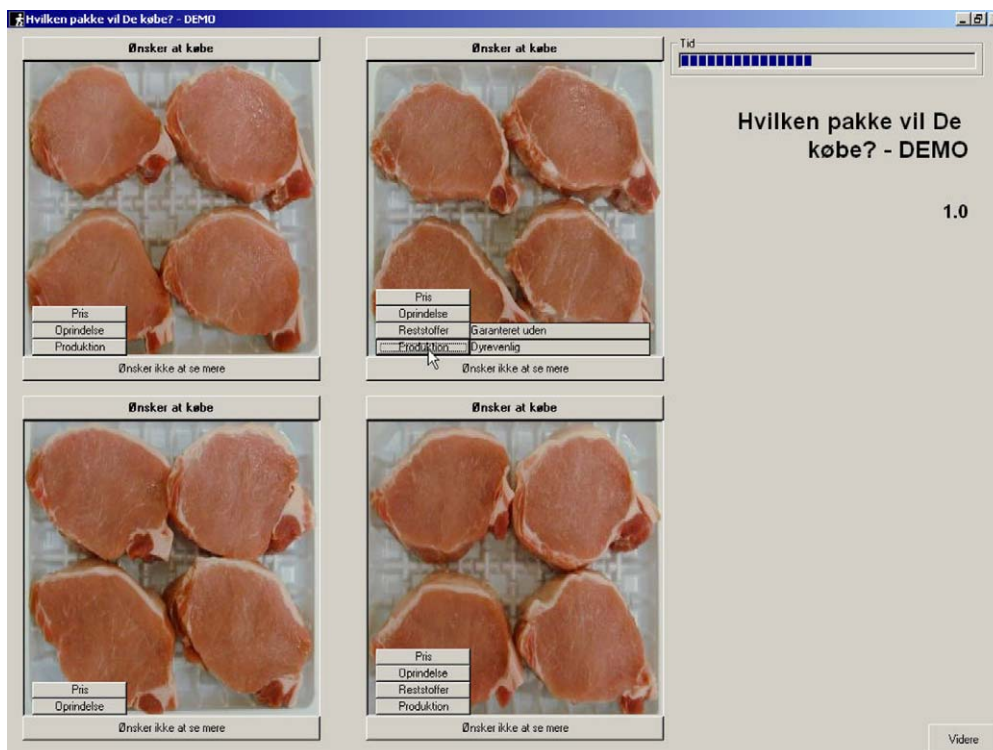


Fig. 5. Meat selection simulation.

of the cues and pictures could be estimated as in a standard choice-based conjoint analysis. In addition, all mouse clicks were registered, making the information acquisition process leading up to the decision transparent. The whole process thus simulated a situation where products with new extrinsic cue information have entered the market (details can be found in Grunert, 2004; Grunert et al., 2002). It was administered to a sample of 299 German respondents.

Average time for making a decision was 20.2 seconds, which is well in line with the Dickson and Sawyer results. During that time, respondents managed to click, on average, 3.1 times to get price information, 2.7 times to get information on origin, and 0.9 times to get information on residues or on animal welfare. The probability of having seen any price information at all before making a choice was 0.9, the corresponding probabilities for origin, residues and animal welfare were 0.8, 0.5 and 0.5.

These results show two things. First, a smaller fraction of the respondents made the decision based on the intrinsic cues only. Second, a majority of the respondents used the ‘traditional’ extrinsic cues price and origin, even though the decisions were made very fast. Third, about half of the respondents did at least have a look at the ‘new’ extrinsic cues. Of course, the simulation is not a perfect replica of the real world, and the availability of the new information was probably more prominent here than on a real-world label, where a lot of other information, much of it useless for decision-making, is present. But the mere fact that decisions are made fast and under time pressure does not seem to prevent consumers from having a look at this new information.

The fact that consumers have seen the new extrinsic cues does not necessarily mean that these cues have an impact on their decisions. The results in Table 1 shed some light on this. Here, we have estimates for utilities of the various cues as they result from estimating a multinomial choice model. In order to take into account that respondents obviously differed in their interest for the various cues, a mixture model was estimated where different sets of utilities were estimated for two latent classes of respondents. The two segments that emerge have clearly different profiles in their choices: one segment is price conscious, with price being the major factor influencing their choice. The other segment is quality conscious, and uses the price cue as a quality cue and not as a cost cue. But for both segments did the new extrinsic cues have some impact on their choices, though with different weights for the two segments.

Still, not all shopping is done in supermarkets. And actually the lead users with regard to the use of extrinsic cues beyond origin and place of purchase may be those who are most apt to do part of their shopping somewhere else. For example, Verbeke and Vackier (2004) segmented a sample of Belgian consumers based on their involvement with meat, and found that those who were more concerned or cautious about meat had more extensive decision-making processes with regard to meat and were more likely

Table 1
Results from shopping simulation

| | Segment 1 | Segment 2 |
|----------------|-----------|-----------|
| | 61% | 41% |
| Picture | | |
| 1 | 0.00 | 0.00 |
| 2 | −0.29 | −0.25 |
| 3 | −0.28 | 0.03 |
| 4 | −0.43 | −0.23 |
| Weight | 0.28 | 0.04 |
| Animal welfare | | |
| No | 0.00 | 0.00 |
| Yes | 0.39 | 0.78 |
| Weight | 0.25 | 0.13 |
| Residues | | |
| No | 0.00 | 0.00 |
| Yes | 0.15 | 1.03 |
| Weight | 0.10 | 0.17 |
| Origin | | |
| Denmark | 0.00 | 0.00 |
| Germany | 0.27 | 1.06 |
| Weight | 0.18 | 0.18 |
| Price | | |
| 9.99 | 0.00 | 0.00 |
| 11.99 | 0.16 | −1.15 |
| 14.99 | 0.29 | −2.92 |
| Weight | 0.19 | 0.49 |

Analysed as choice-based conjoint analysis, German data, $n = 299$, latent class analysis in GLIMMIX.

to purchase meat other places than in supermarkets. Hoek et al. (2004), comparing food-related lifestyle of Dutch meat users, vegetarians, and meat substitute users, found that vegetarians attach more importance to product information and are more likely to use specialty shops.

I have no doubt that also in the foreseeable future the bulk of meat will be bought fast and easy in supermarkets. But some people shop other places occasionally, and there are small specialized segments that do a major part of their shopping at alternative outlets. To the extent some of these have lead user characteristics – and even vegetarians could be viewed as lead users when talking about the future of the meat business – we can at least speculate about whether some part of the meat business may move to more specialized retail outlets. These will be products that are more information intensive, more specialized, may be more processed, possibly including products with special health characteristics (functional foods). Just as there are relatively few consumers regularly buying organic food, but many that are occasionally doing so, we may face a development where only few consumers do most of their shopping outside supermarkets, but many who do so occasionally.

3.3. Cooking methods and consumption situations: convenience and meat avoidance

Everybody agrees that the importance of convenience in the production and marketing of food products and services is increasing. In a US survey, 55% of respondents

indicated that convenience is ‘very important’ in their food purchases (Senauer, 2001). In many countries of the Western world, the share of meals eaten outside the home is increasing. But what, actually, do we mean when we say convenience? Convenience is a multi-faceted phenomenon (Costa, Dekker, Beumer, Rombutts, & Jongen, 2001; Jack, O’Neill, Piacentini, & Schröder, 1997). Darian and Cohen (1995) suggested that convenience can cover any savings of time, physical energy, or mental energy that occurs during one or more of the phases of the home food production chain: deciding what to eat, purchasing, preparation, consumption and cleaning up. Convenience then covers a good deal more than ready-made meals or eating out.

Why is convenience a trend? Many relate it to changing demographics, especially the increase of female participation in the labour force, but attempts to relate such variables directly to the demand for convenience-related food products and services have led to mixed results (e.g., Darian & Klein, 1989; Kim, 1989; Strober & Weinberg, 1980). Others argue that the convenience trend is mainly a question of changing attitudes, with the pride in homemade food and the negative attitude towards convenience products slowly disappearing (e.g., Candell, 2001; Cowan, Cronin, & Gannon, 2001; Swoboda & Morschett, 2001). The truth may be in a combination of both arguments, as recent research by Scholderer and Grunert (2005) has shown. They demonstrated that convenience orientations act as a mediator between perceived resources (in terms of disposable time and money) and convenience-oriented behaviour (like buying convenience foods). In addition, they showed that convenience orientation is also affected by other factors, notably food-related motives, like involvement with food (the conceptual model is shown in Fig. 6).

We can therefore not expect a simple relationship between, for example, time scarcity and demand for convenience products. First of all, it is the perceived scarcity of time, and the experience of stress in daily life that affects

behaviour. Second, food-related motives and attitudes may either reinforce or counteract the ensuing tendency towards more convenience in the kitchen. More importantly, we would then also expect that different types of consumers, even when they experience the same type of stress and time scarcity, would demand different types of convenience, in order to retain consistency with their general food-related lifestyle. A major study of demand for convenience products and services in Ireland (de Boer et al., 2004; Ryan, Cowan, McCarthy, & O’Sullivan, 2002) demonstrated very nicely that demand for convenience can be high in lifestyle segments as different as the ‘adventurous’ and the ‘extremely uninvolved’ food consumers, and that different lifestyle dimensions are associated with demand for different types of convenience products and services.

The meat industry has responded to the convenience trend mostly in the ready meal category, where many of the products have a meat component. The range of products available still differs considerably between countries, even within Europe, but it is probably safe to say that the bulk of products are still mainly targeted more at the uninvolved than at the food-loving consumer segments. Food-loving consumer segments, like the adventurous and hedonistic types in the food-related lifestyle segmentations, typically like to retain degrees of freedom in their meal preparation and therefore prefer meal component types of products, which generally have been forthcoming more slowly in the meat sector.

A seemingly completely unrelated other trend in terms of cooking methods may be tendencies towards meat avoidance, especially of young female consumers (Kubberød, Ueland, Tronstad, & Risvik, 2002, in press; Larsson, Klock, Nordrehaug Astrom, Haugejorden, & Johansson, 2002). The fact that some of these consumers are offended by blood, raw meat, and clear links to certain animal body parts does not necessarily imply that they will

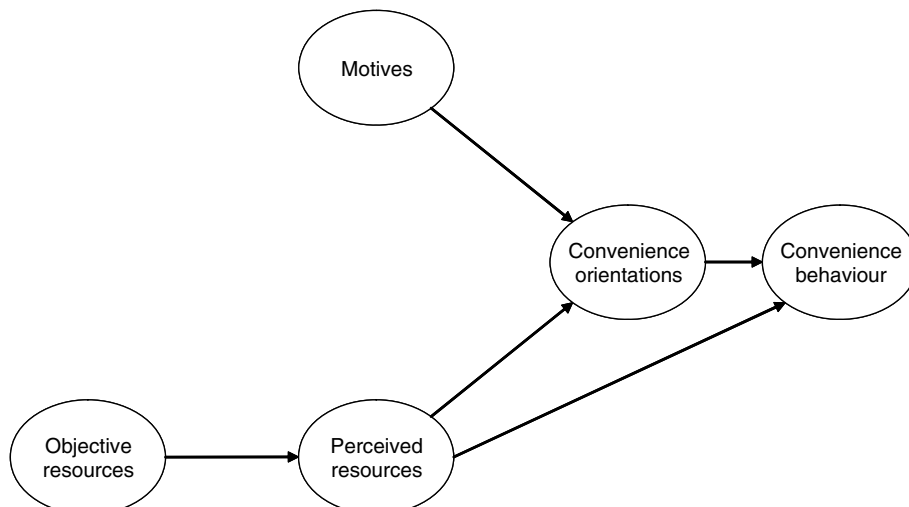


Fig. 6. Conceptual model of convenience demand (from Scholderer and Grunert, 2005).

become vegetarians, but that they will go for meal preparations where meat and especially its animal origin are less prominent, for example due to higher forms of processing. Interestingly enough, use of meat substitutes may be attractive to some consumers because it combines avoidance of ‘real’ meat attributes with a higher degree of convenience, as compared to real meat products (Hoek et al., 2004; Sadler, 2004).

There is no solid evidence available on how strong the meat avoidance trend is, and whether it will grow. However, convenience and meat avoidance may, in terms of product development, point at similar directions, namely at meat-based products with a high degree of processing, detached from their animal origin, and adapted to different motives of different consumer segments.

3.4. Purchase motives: how much concern for animals and the environment?

One of the recurring themes in discussions about the future of the meat industry is the question on how concerned consumers really are about questions concerning meat production – including topics like animal welfare, feed, use of medicine, hormones, environmental effects, etc. Numerous studies have shown that at least some consumers have concerns of that nature, and the range of meat scandals that we have observed has sharpened public and especially media attention. But it is also a widespread opinion that the attitudes that consumers express may not be strongly related to their purchase behaviour, as mirrored by the low market shares of, for example, organic and free range meat.

Contrary to what many non-social scientists believe, the issue about the relationship between attitude and behaviour – or the lack of it – is well-known in the social sciences, and has been researched for more than 50 years. There is a good body of knowledge on the factors that determine whether a given attitude will be related to behaviour or not (e.g., Fazio, 1990).

We all have lots of attitudes that affect our behaviour only occasionally. Usually, these will be attitudes that are not strongly held, and attitudes that are not very accessible to our thinking at the time of the behaviour. Simply speaking, strongly held attitudes are those where the attitude object is embedded in a network of associations, and where these associations are based on own experience. The less we know, and the more what we know is based on indirect sources, the less these attitudes will affect our behaviour. Many people may voice a critical attitude towards pig production when asked, but most of them will know only little about the topic, and what they know will mostly not be from first hand experience. Such attitudes will affect our behaviour only occasionally.

Whether they affect our behaviour will then depend on attitude accessibility at the time of the behaviour – in the shop, for example. Here, we should remember the characterization of most grocery shopping earlier in this paper,

namely as a time-pressed and information-overloaded situation. Many other things are on people’s minds. But external factors can make people remember their attitudes – ‘activate’ them, in terms of cognitive psychology. Such activation can, for example, be caused by promotions at the point of sale. Most consumers probably bring a whole range of potentially relevant, but not ordinarily used attitudes to the shop. Which of these, if any, will become relevant for their shopping actions will then depend on the stimuli to which they are exposed in the shopping environment.

The fact that people voice concerns about topics like animal welfare and other aspects of meat production, especially when they are prompted to express their degree of concern by an interviewer, is thus not inconsistent with the fact that these concerns affect their shopping behaviour only occasionally. Consumers are often quite aware of this. Studies in several European countries (Holm & Møhl, 2000; Ngapo et al., 2004) demonstrated once more that consumers have lots of concerns about animal production, but also showed that consumers themselves freely remarked that there was no or little link between the negative image of production methods and their purchase behaviour.

That negative attitudes towards meat production have only limited effect on people’s shopping behaviour does not necessarily mean that they may not affect other behaviours. It has become common to distinguish between people’s role as consumer and people’s role as citizens. As consumers we make purchases and thus are heard in the marketplace. As citizens we participate in the political process and in the process of public opinion formation. Behaviours linked to the citizen role include voting, writing letters, organizing in associations and others ways of voicing views in the public arena. Attitudes towards meat production may have limited effect on shopping behaviour, but may still have effect on behaviours like voting in local elections, or going to meetings trying to prevent the building of another pig farm. The citizen role with regard to meat is less well researched than the consumer role, but may be equally important in certain situations.

The current situation is therefore that many people have attitudes towards meat production, but that for most consumers these will be weak and will, in most situations, not affect their purchase behaviour, although they may affect other behaviours. However, changes are possible. Even weak attitudes may be activated at the place of purchase and then become relevant for buying behaviour in that particular situation. Even this does not necessarily imply that the consumer will then buy a product positioned as, for example, an animal welfare product, but it implies that such product attributes, when linked to an activated attitude, will enter the trade-off among different buying criteria. Attitudes towards meat production will then not generally affect buying behaviour, but they can be regarded as a potential that can be tapped by creative marketing and product development.

4. Future perspectives

In the present paper, I have tried to assemble indicators for a number of trends regarding the role of meat in the life of consumers. Using the food-related lifestyle model as a conceptual framework, I have discussed four trends:

The increasing role of extrinsic cues in quality perception of meat. There seems to be a trend that meat quality is increasingly inferred from information about the meat, not only the meat itself, beyond the traditional extrinsic quality cues origin and place of purchase. This gives room for more differentiation in meat products, but also poses new requirements for the organization of the meat value chain, which has to fulfil the functions of delivering both meat and information.

The distinction of fast and efficient shopping in supermarkets on the one hand and the buying of information-intensive specialized products in specific retail outlets on the other. While the bulk of meat will still be bought in supermarkets also in the future, there may be room for other retail channels for specialized products – and especially those products where the positioning relies on the credible supply of extrinsic cues, as noted above.

The increasing role of processed products, living up to both the demand for convenience and the trends towards meat avoidance in some consumer groups. Convenience is one of the major trends in food, whereas meat avoidance is a trend restricted to certain consumer groups. But both can lead to similar implications, namely products with a higher degree of processing that enables both more built-in convenience and less visibility of the meat ingredient.

The channelling of concerns about meat production mainly into the citizen and less into the consumer role of people. People do have attitudes towards meat production – but mostly not very strong ones, and they will affect behaviour therefore only in situations where these attitudes are activated. This may be the case in some purchase situations, but it may be more likely in a range of other behaviours that are related not to the consumer, but the citizen role of people.

A fifth trend that I could have mentioned is fragmentation and diversification. It is a horizontal trend showing up in all four of the above. The more we market meat products based on extrinsic cues, the more we open up for possibilities of product differentiation, and given the diversity of consumer lifestyles, the more diversified the offerings will become. As noted in the second trend, this diversification in products may be accompanied by a diversification in retail channels. As we then add processing to satisfy demands for convenience, we add more diversity, especially when we want to address the different demands for convenience that consumers with different motives will have, as noted earlier in this paper. And the fact that people develop attitudes on meat production that will not continuously and strongly, but occasionally and weakly affect their purchase behaviour, adds another facet to fragmentation and diversification.

Much of meat production is traditionally a bulk production, and the movement from bulk to differentiated, value-added products is probably the biggest trend of all. It is not a trend in consumer lifestyles, but a trend that comes about in the interaction of consumer lifestyles and a food chain that increasingly becomes capable of exploiting the possibilities of biological variation in way that adds to consumer welfare and well-being.

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