

# FOCUS BALKANS

## Cluster analysis Consumer segmentation

Ipsos Strategic Marketing  
2009

# **-Lifestyle Segmentation for JUICE producer-**

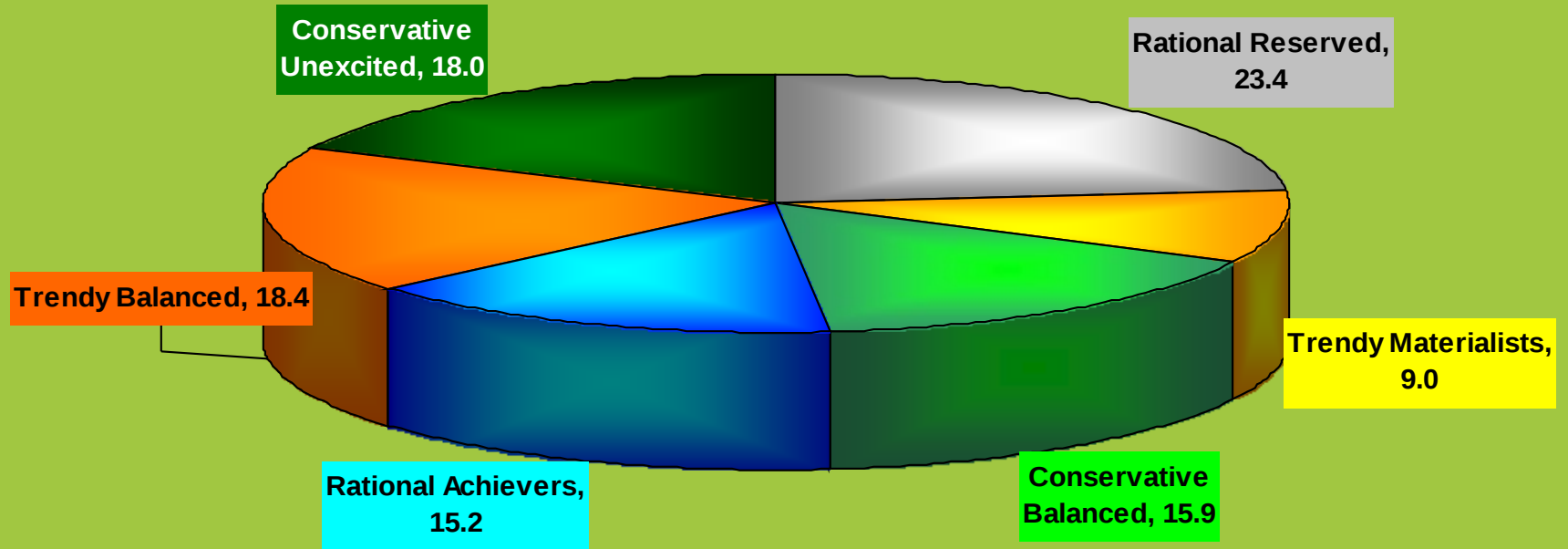
**- Serbia & Montenegro, 2004-**

# Lifestyle segmentation methodology

- There were 53 statements that measured attitudes towards general life topics, behavior, shopping habits, general opinions, values...
- Those statements were input for cluster analysis.
  - K Means cluster method.
- As a result following clusters were found...

# LIFESTYLE SEGMENTS

Base: Respondents 15-55 (1185)



■ Rational Reserved

■ Rational Achievers

■ Trendy Materialists

■ Trendy Balanced

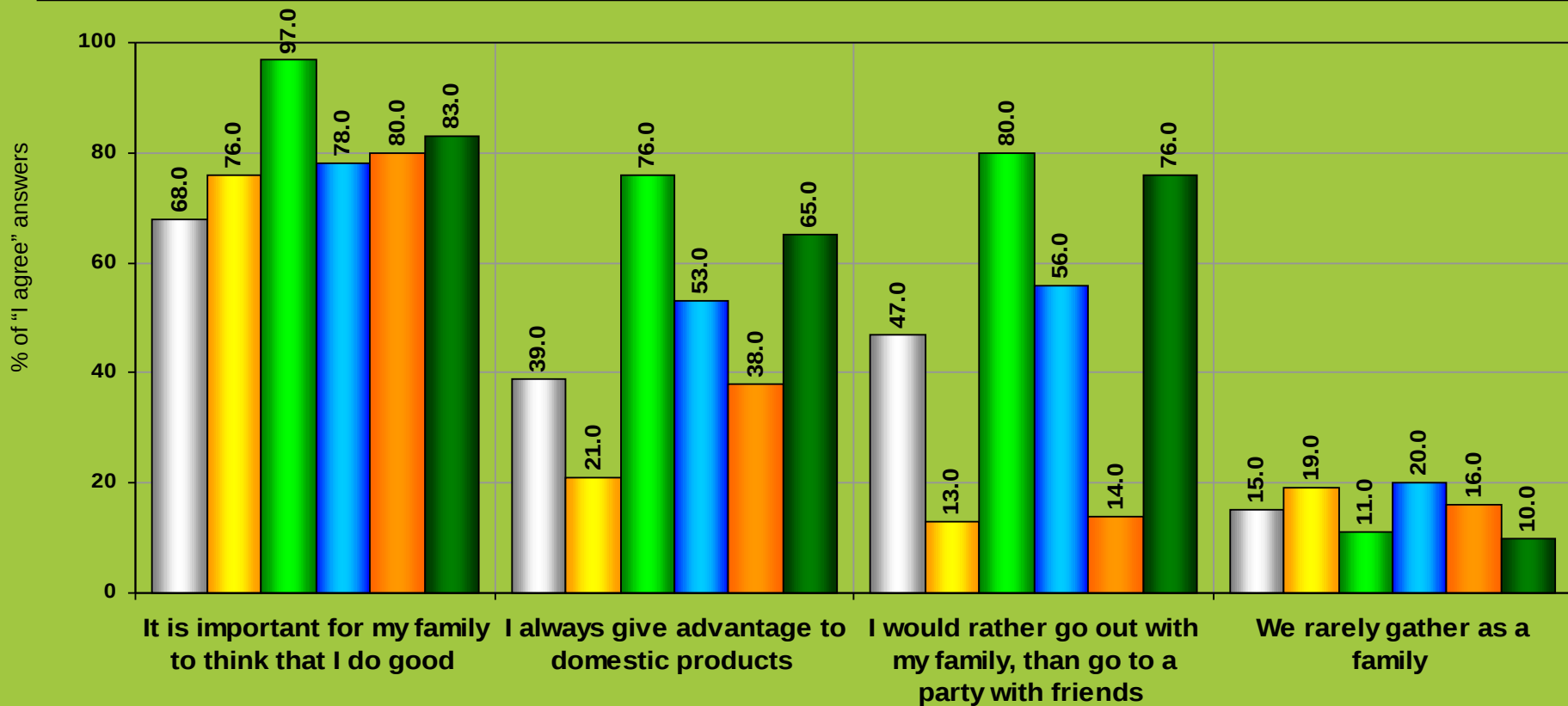
■ Conservative Balanced

■ Conservative Unexcited



# LIFESTYLES

## - Importance of the family, ethnocentrism



□ Rational Reserved

■ Trendy Materialists

■ Conservative Balanced

■ Rational Achievers

■ Trendy balanced

■ Conservative Unexcited



**FOCUS**  
FOOD CONSUMER SCIENCE IN THE BALKANS



# LIFESTYLES

## - Security, routine



Rational Reserved  
 Rational Achievers

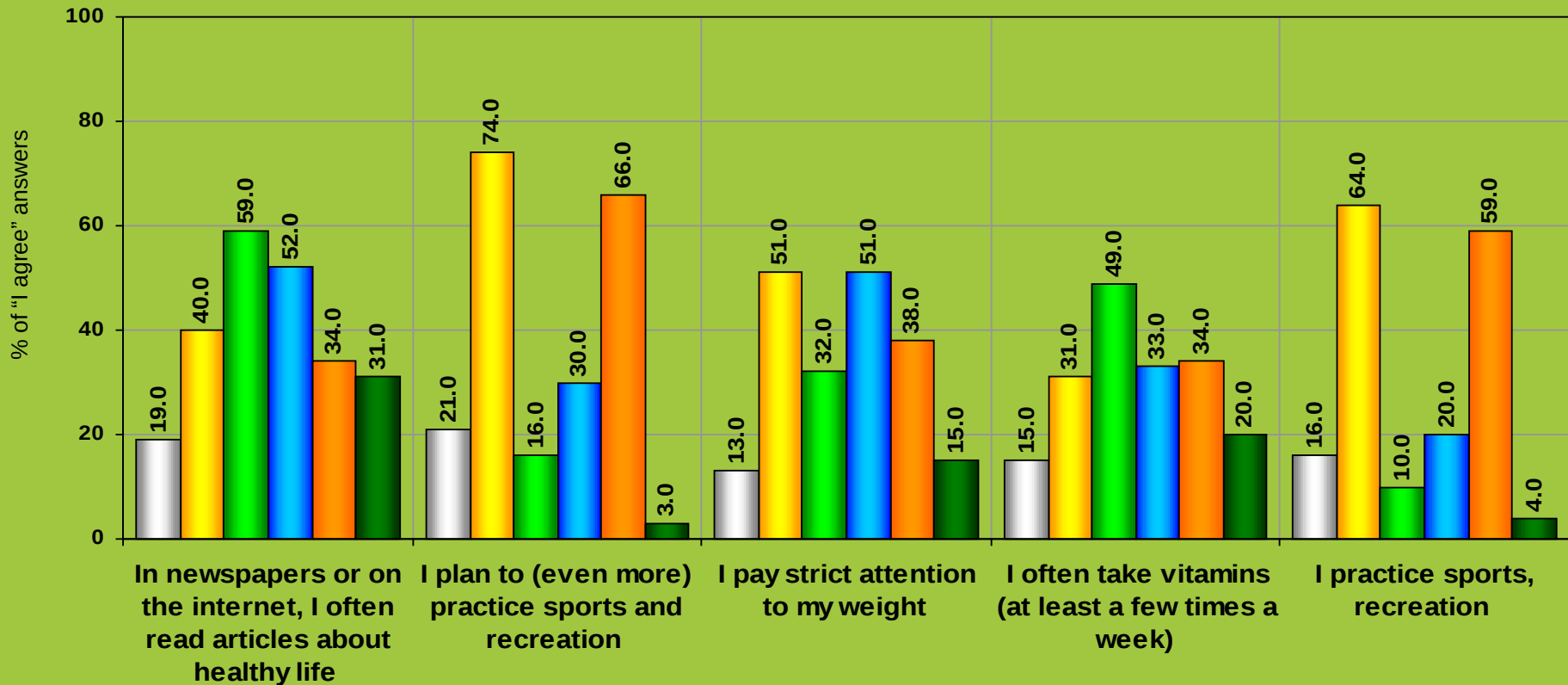
Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexcited



# LIFESTYLES

## - Healthcare, sports



□ Rational Reserved

■ Trendy Materialists

■ Conservative Balanced

■ Rational Achievers

■ Trendy balanced

■ Conservative Unexcited

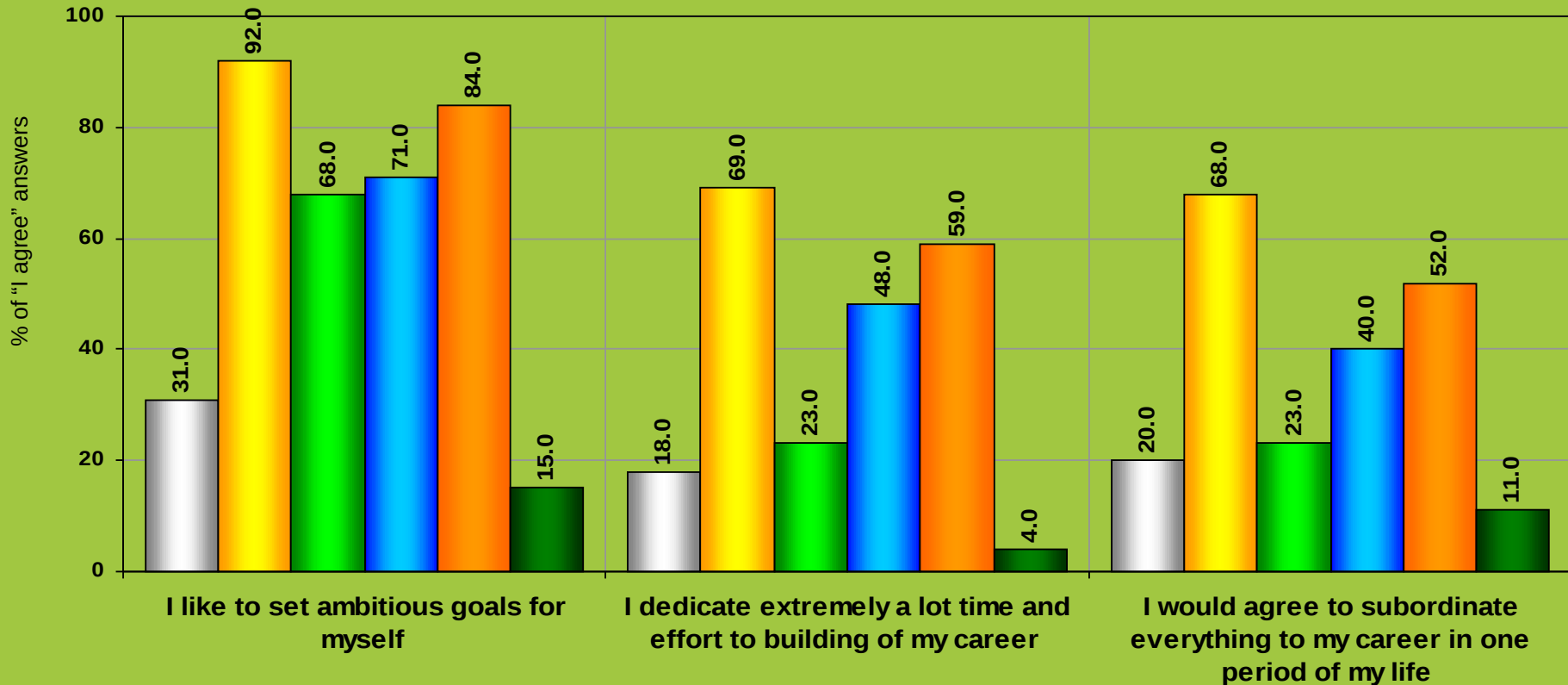


**FOCUS**  
FOOD CONSUMER SCIENCE IN THE BALKANS



# LIFESTYLES

## - Career



Rational Reserved  
 Rational Achievers

Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexcited

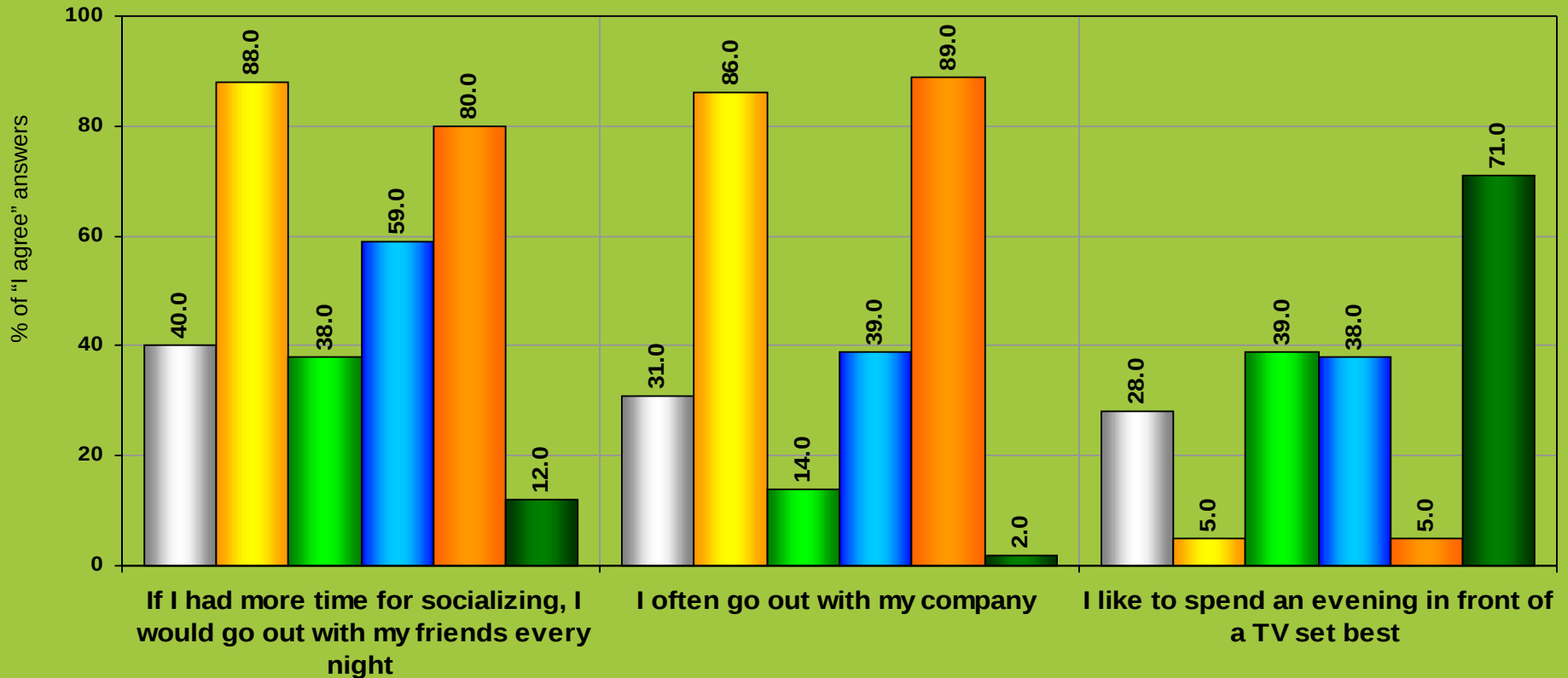


**FOCUS**  
 FOOD CONSUMER SCIENCE IN THE BALKANS





# LIFESTYLES - Outgoing



Rational Reserved  
 Rational Achievers

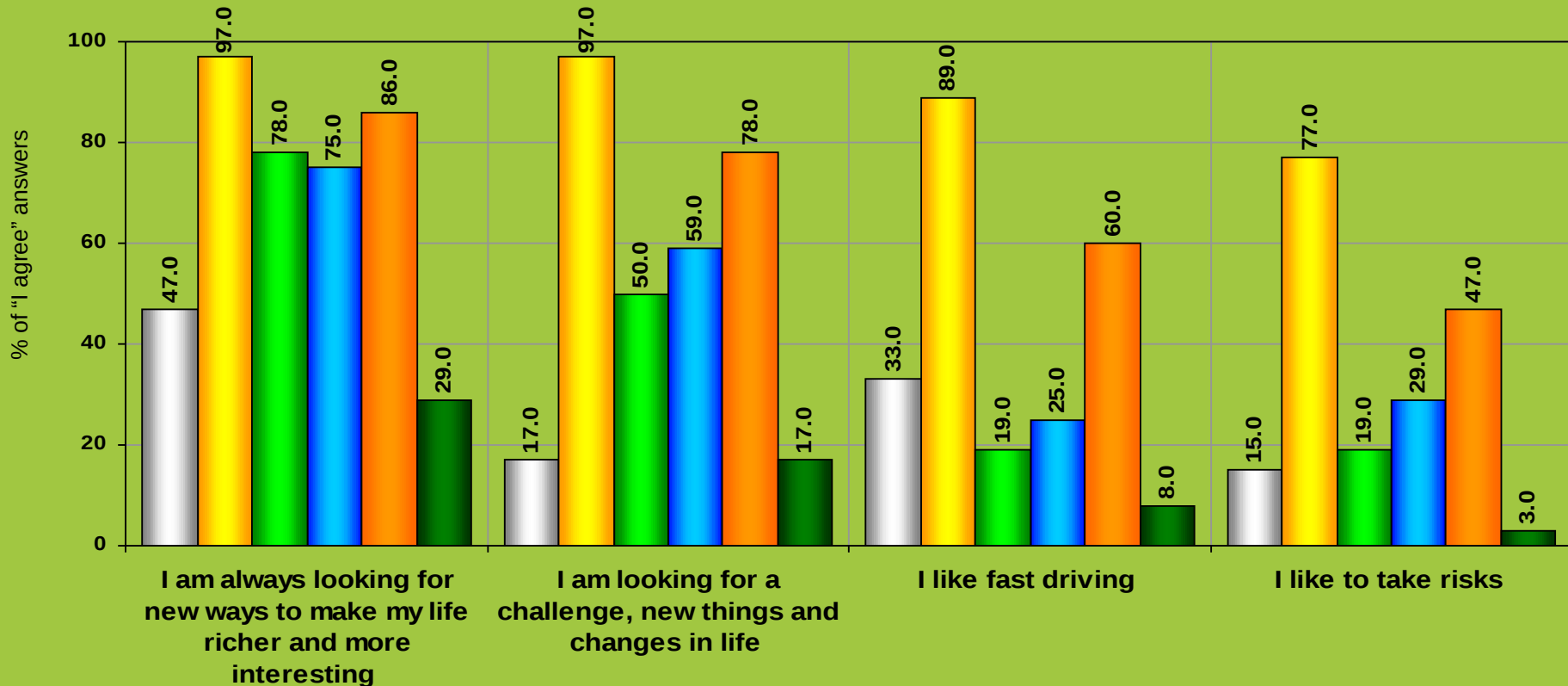
Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexcited



# LIFESTYLES

## - Not standing still, risking



Rational Reserved  
 Rational Achievers

Trendy Materialists  
 Trendy balanced

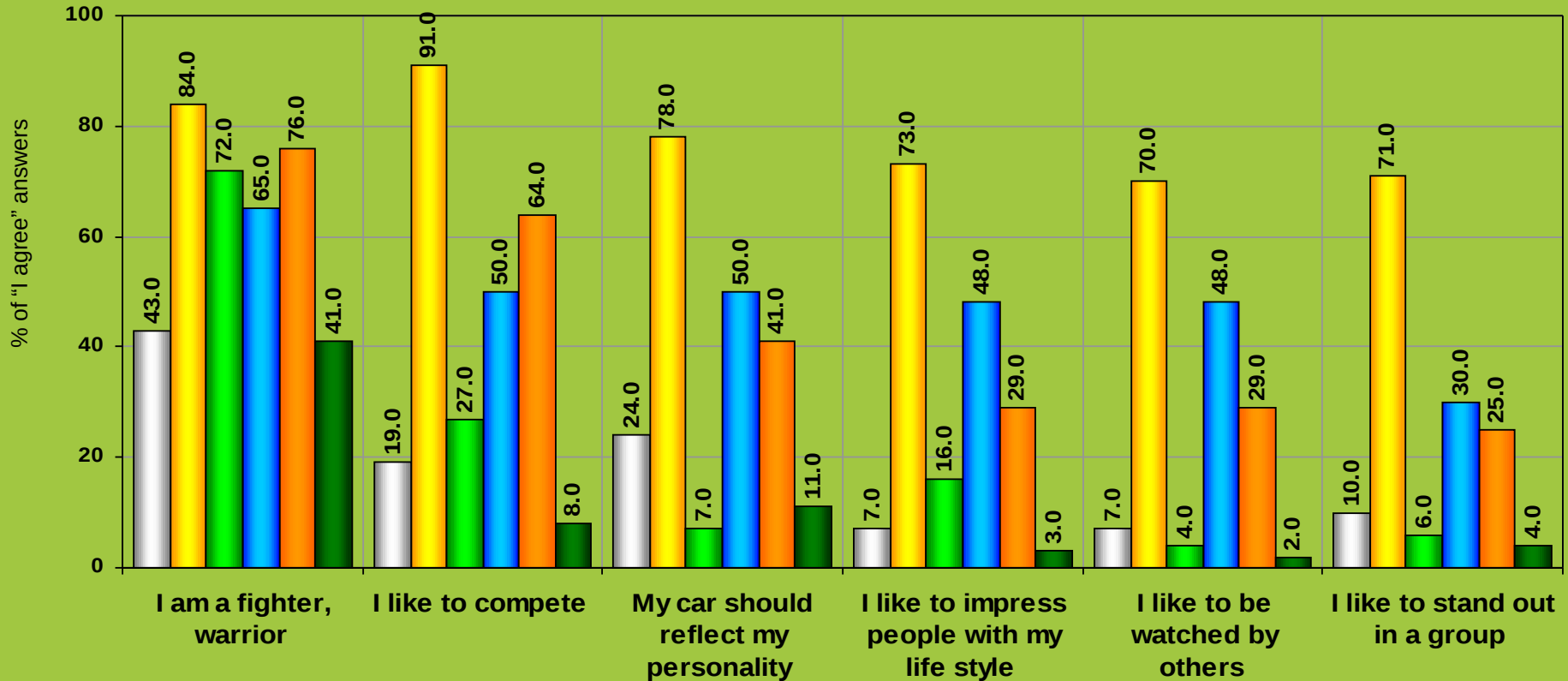
Conservative Balanced  
 Conservative Unexcited



**FOCUS**  
 FOOD CONSUMER SCIENCE IN THE BALKANS

# LIFESTYLES

## - Standing out



■ Rational Reserved  
■ Rational Achievers

■ Trendy Materialists  
■ Trendy balanced

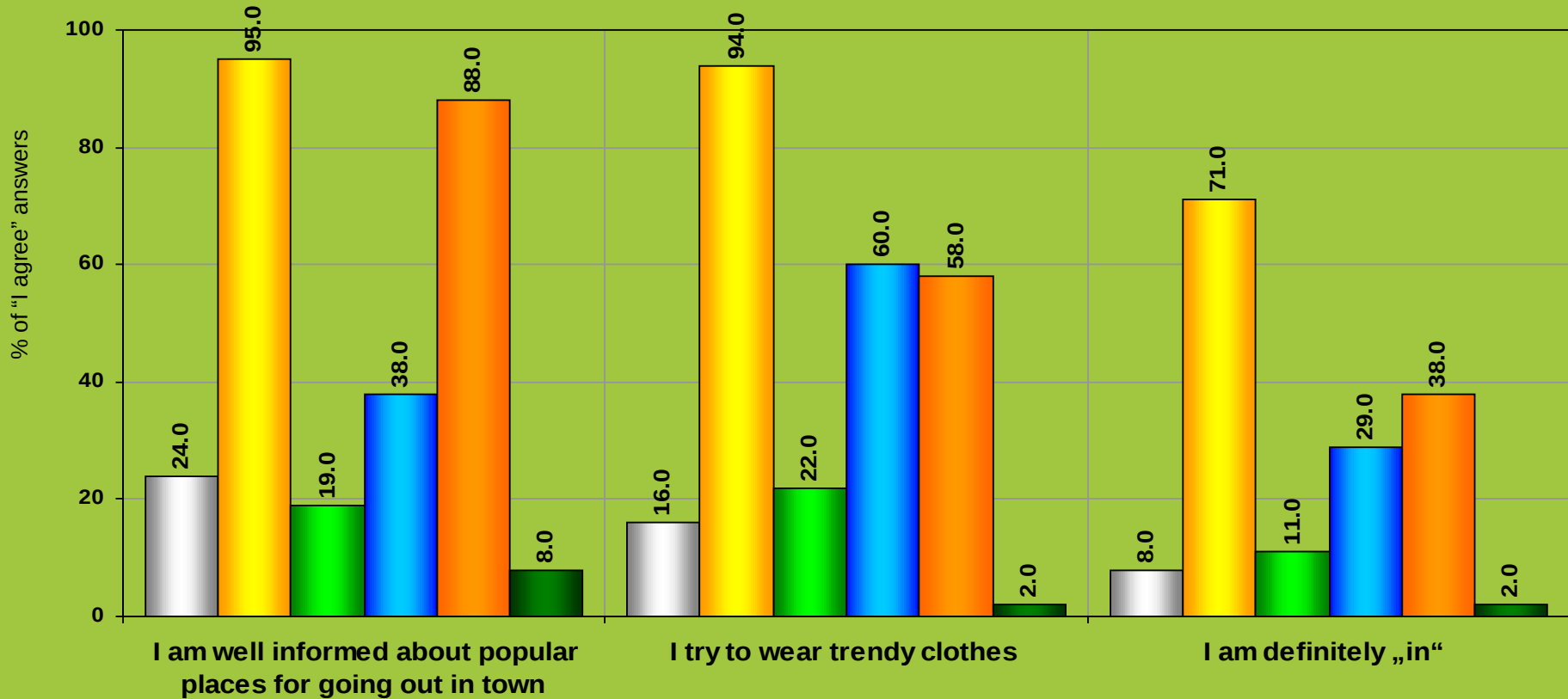
■ Conservative Balanced  
■ Conservative Unexcited



**FOCUS**  
FOOD CONSUMER SCIENCE IN THE BALKANS



# LIFESTYLES - Trends



Rational Reserved  
 Rational Achievers

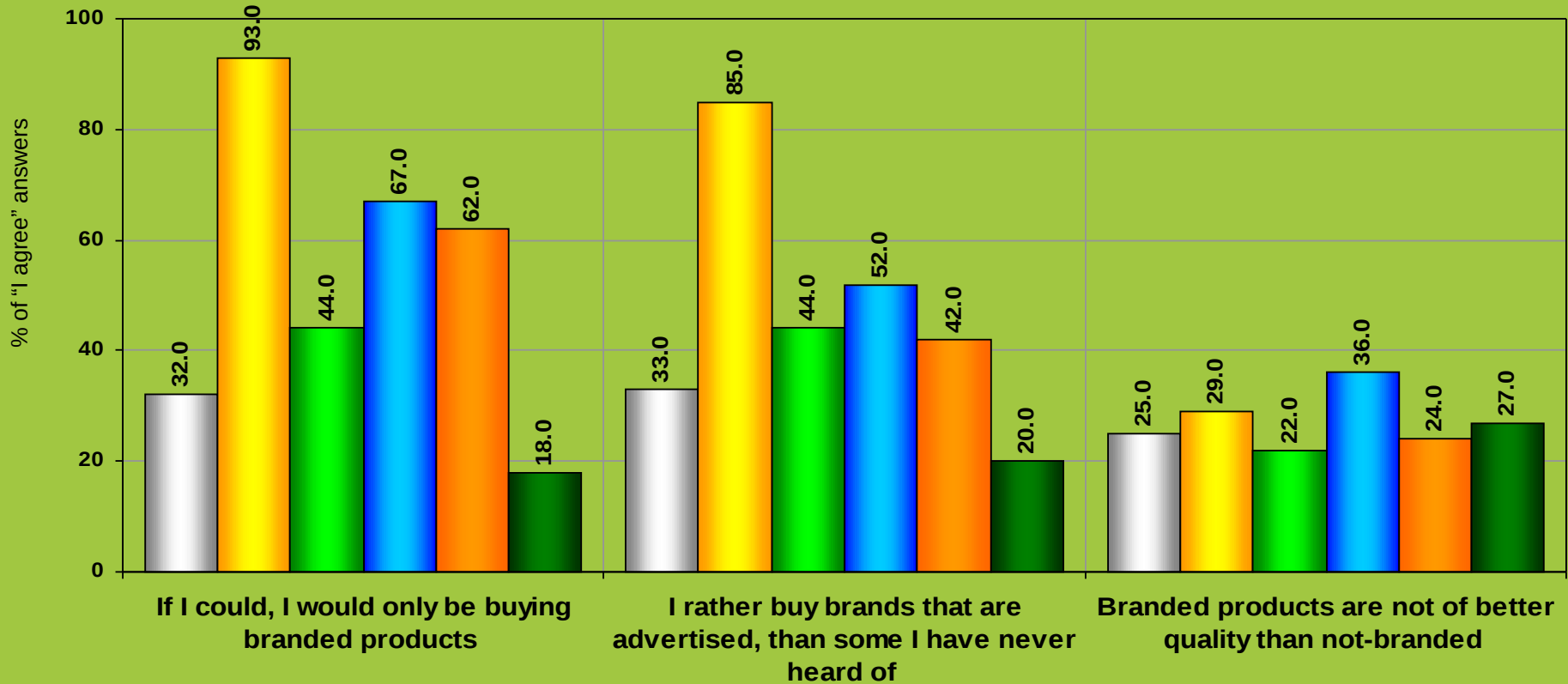
Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexcited



**FOCUS**  
 FOOD CONSUMER SCIENCE IN THE BALKANS

# LIFESTYLES - Brands



Rational Reserved  
 Rational Achievers

Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexcited

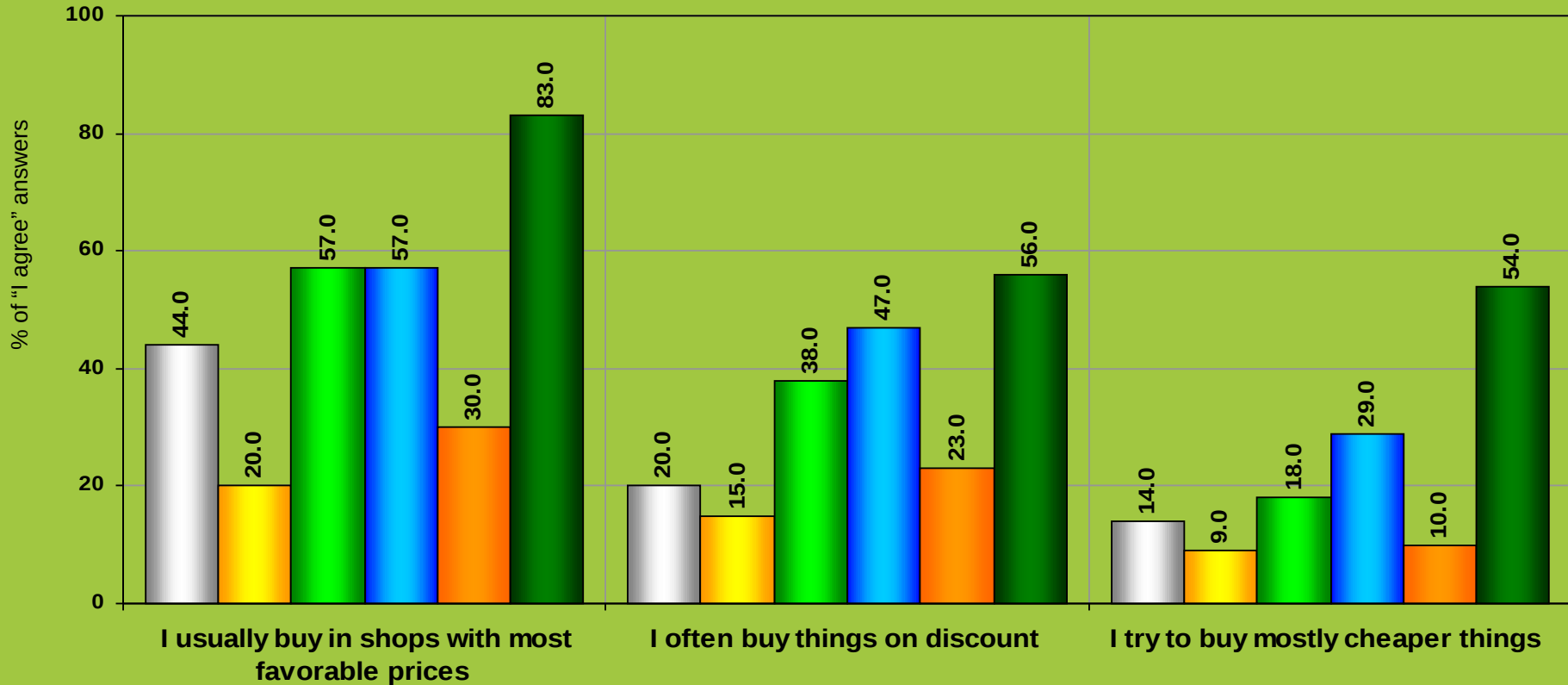


**FOCUS**  
 FOOD CONSUMER SCIENCE IN THE BALKANS



# LIFESTYLES

## - Prices (low prices)



Rational Reserved  
 Rational Achievers

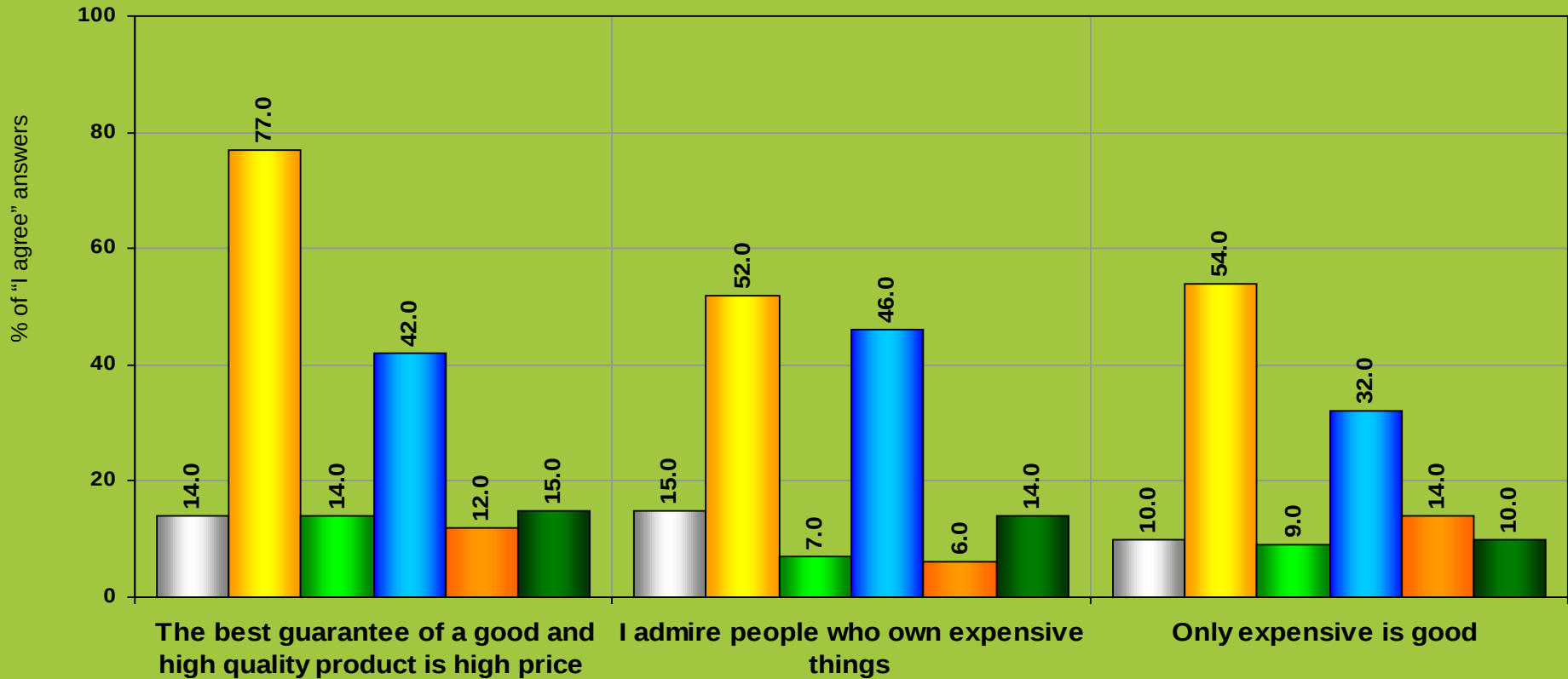
Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexcited



# LIFESTYLES

## - Prices (high prices)



□ Rational Reserved

■ Rational Achievers

■ Trendy Materialists

■ Trendy balanced

■ Conservative Balanced

■ Conservative Unexcited

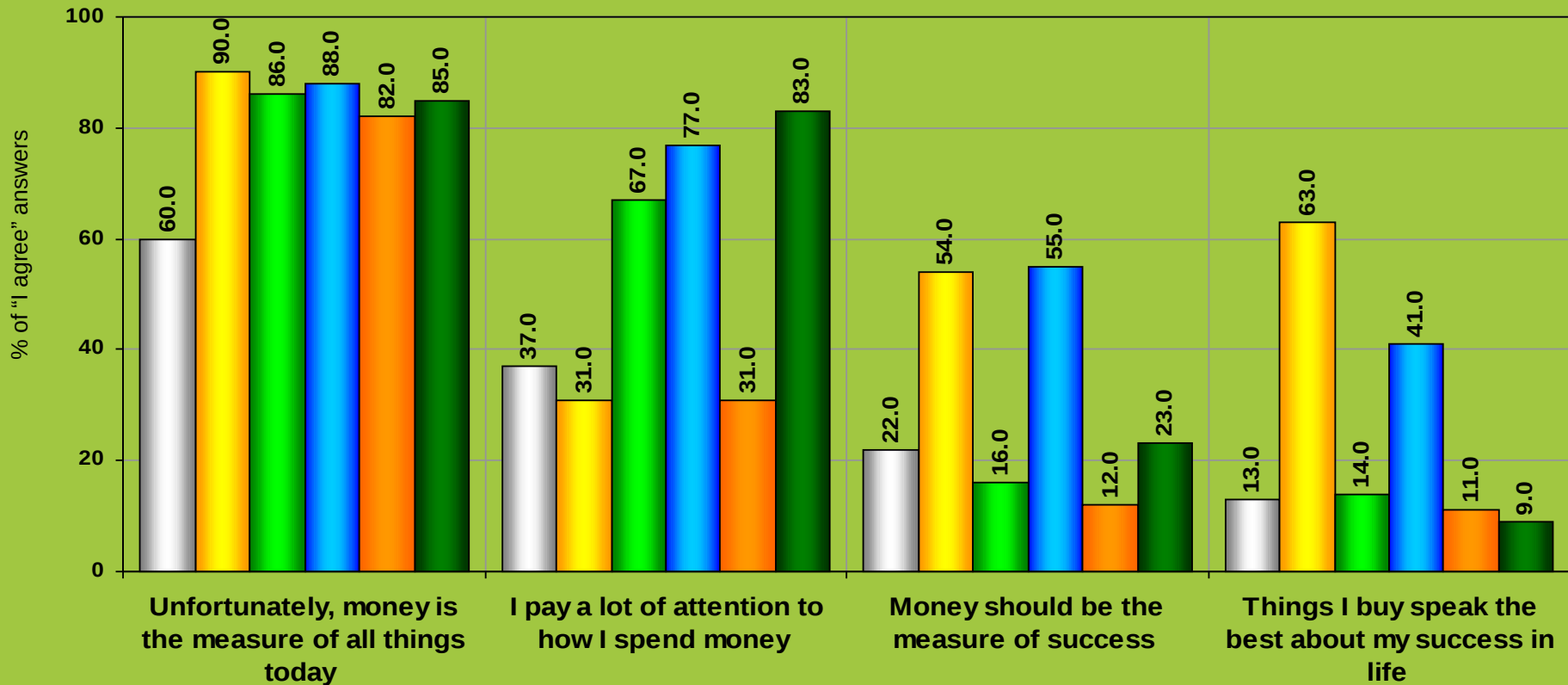


**FOCUS**  
FOOD CONSUMER SCIENCE IN THE BALKANS



# LIFESTYLES

## - The role of money



■ Rational Reserved

■ Trendy Materialists

■ Conservative Balanced

■ Rational Achievers

■ Trendy balanced

■ Conservative Unexcited



**FOCUS**  
FOOD CONSUMER SCIENCE IN THE BALKANS



# LIFESTYLES

## - Enjoyment in shopping



Rational Reserved  
 Rational Achievers

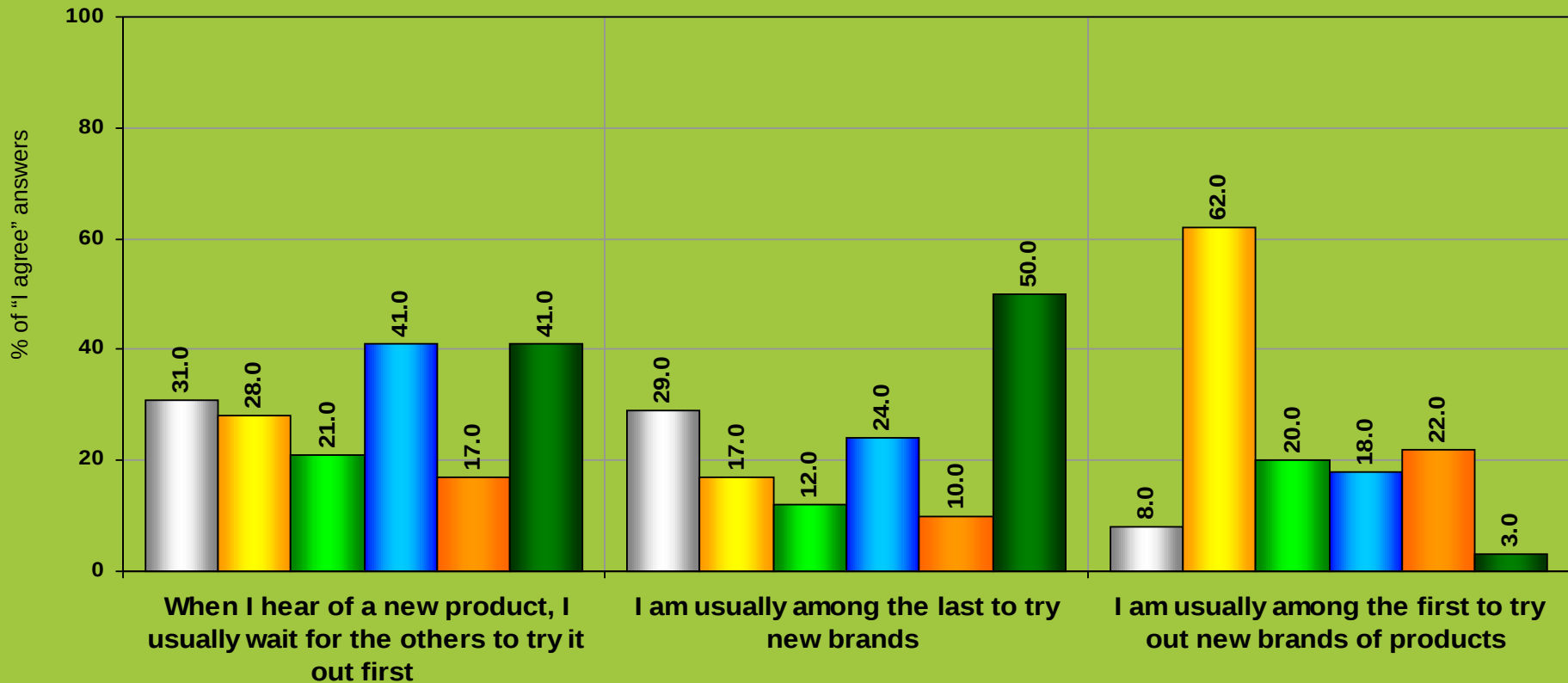
Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexcited



# LIFESTYLES

## - Cautiousness in shopping



■ Rational Reserved

■ Trendy Materialists

■ Conservative Balanced

■ Rational Achievers

■ Trendy balanced

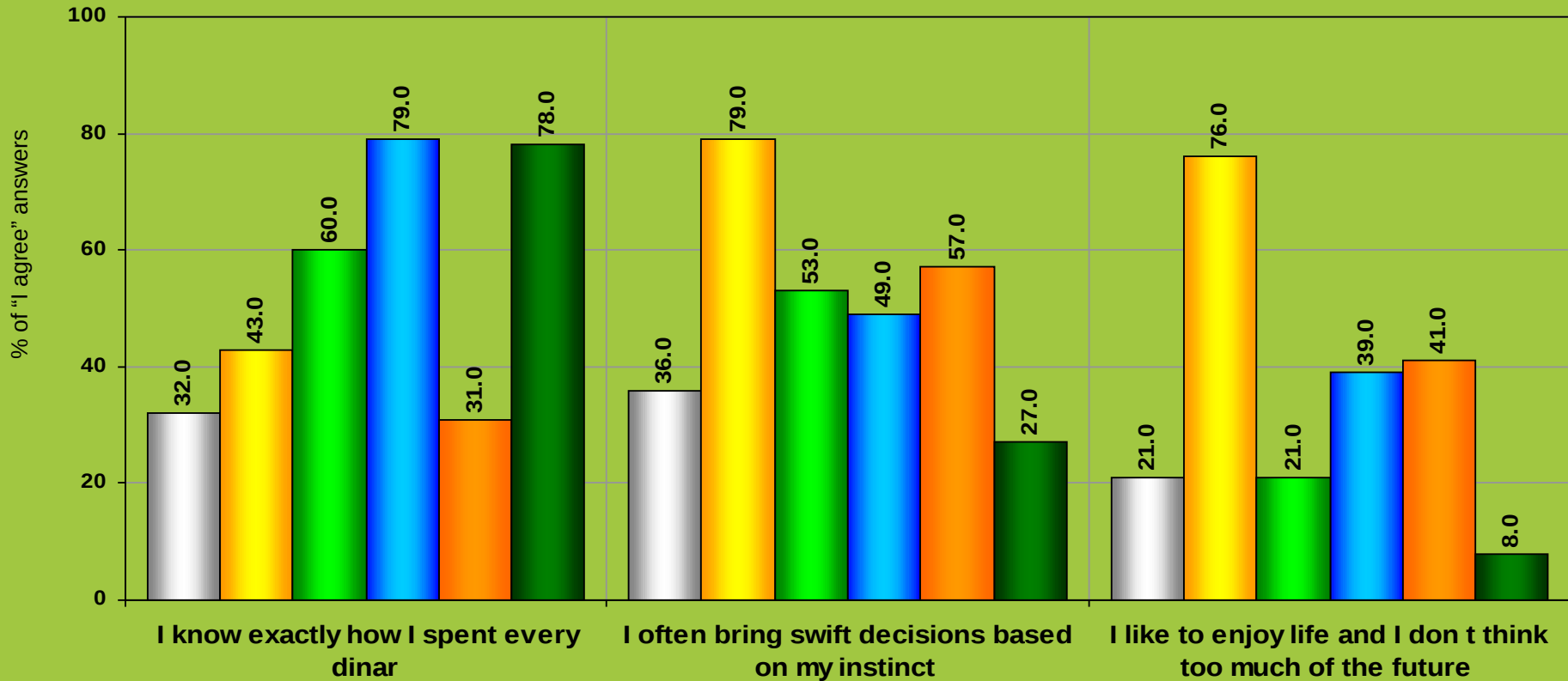
■ Conservative Unexcited



**FOCUS**  
FOOD CONSUMER SCIENCE IN THE BALKANS

# LIFESTYLES

## - Impulsiveness



Rational Reserved  
 Rational Achievers

Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexcited



# LIFESTYLE DESCRIPTION

## - Rational Reserved

- 23% of population.
- These people are pretty average on most of the indicators. In many aspects they show signs of being reserved and distant, which does not necessarily mean “giving-up” (unlike some rational segments, they are less inclined to show that they are much striving for goals, fighting, cautiousness...)
- Family is important to them.
- They mostly look for the security in various aspects of life. They often prefer routine.
- Not much interested in practicing sports.
- They don't take much care about weight. Only slightly more interested in health pages and vitamins.
- They are not ambitious (goals and career) like the most ambitious segments, but still they are more ambitious than the 'Conservative Unexcited'.
- Presently, they are not much outgoing – but they would go more out (if only possible), but not too enthusiastically. They don't mind spending night in front of TV either.
- They look for novelties and challenges - modestly. They try to avoid risks but they don't avoid fast driving that much



# LIFESTYLE DESCRIPTION

## - Rational Reserved

- They don't like to stand out, don't like being watched by others, to impress the others. They are not fighters (similar in that aspect to 'Conservative Unexcited').
- They don't try to be "in", therefore they are not well informed about popular places, they don't wear trendy clothes.
- They don't like branded products much. They don't like much advertised products either.
- They often prefer lower prices, discounts, cheaper products.
- They don't like expensive things.
- Modestly interested in money and its role.
- They modestly like shopping.
- They are not the first nor the last to try new products.
- They are not impulsive.
- They are somewhat more male, middle-aged, slightly better affluent. They mostly participate in decision making regarding everyday shopping.

# LIFESTYLE DESCRIPTION

## - Rational Achievers

- 15% of population.
- They want more of everything, but not at any price – on the way to obtaining such high goals, they are pretty cautious and avoid risks (they take care about themselves much). They love money and status, they push for goals and career, like shopping but very cautious with money, and therefore like law prices.
- Family is important to them.
- They are very interested in security (safe job etc) and also very much into (fruit-full) routine.
- Not much interested in practicing sports (they more plan it than practicing it).
- They take care of themselves much. They follow pages (magazines, Internet...) about healthy living. They pay attention to their weight, they take vitamins.
- They are very ambitious, they set high goals, want to advance in career much.
- Presently, they are modestly outgoing – but they would go more out (if only possible). They don't mind much spending night in front of TV either.
- They usually very gladly look for novelties and challenges. But they try to avoid risks (including fast driving).
- They like to stand out, but that is not such an obsession as in case of trendy materialists. They like being watched by others, to impress the others. Their car should reflect their personality. They like competition. They are fighters.



# LIFESTYLE DESCRIPTION

## - Rational Achievers

- They wear trendy clothes more than being well informed about the most popular places. They are “in”.
- They like branded products. They like advertised products. Even more than trendy balanced.
- They usually insist on lower prices, discounts, cheaper products.
- They like expensive things and people who have them (money being the measure of quality).
- Very cautious about money, they have positive attitude about the role of the money - they like money and accept money as measure of success.
- Like shopping very much, but they are cautious with spending.
- They are not the first nor the last to try new products.
- They try not to be impulsive.
- They are somewhat more female, middle-age, important decision makers about everyday shopping, slightly more affluent.

# LIFESTYLE DESCRIPTION

## - Trendy materialists

- 9% of population.
- These people are very extroverted, adore money and status, pushing for careers and goals, like risking. They somewhat resemble to 'Trendy balanced' but 'Trendy materialists' much more insist on money and status.
- Family is less important to them.
- They are little interested in security (safe job etc) and routine.
- Very much interested in practicing sports.
- Modestly interested in taking care about weight, health pages and vitamins.
- They are very ambitious, they set high goals, want to advance in career much.
- They are very outgoing – they go out much, and they would go even more out (if only possible), they hate spending night in front of TV.
- They can barely stand still, always looking for novelties and challenges. In their case that includes taking risks and fast driving.
- Of all the segments, they like the most to stand out prominently – being watched by others, to impress the others. Their car should reflect their personality. They like competition. They are fighters.
- They are “in”, they are well informed about popular places, they wear trendy clothes. They insist in those things.





# LIFESTYLE DESCRIPTION

## - Trendy materialists

- They like branded products. They like advertised products.
- They don't insist at all on lower prices, discounts, cheaper products.
- They adore expensive things and people who have them (money being the measure of quality).
- Not cautious about money, they adore role of money.
- Like shopping very much, but it's not the shopping that is exciting but opportunity to show off money.
- They are the first to try new products.
- They are the most impulsive segment.
- They are somewhat more male, but they are definitely younger, mostly still in education, better affluent, rarely participate in everyday shopping.

# LIFESTYLE DESCRIPTION

## - Trendy balanced

- 19% of population.
- They are very extroverted people. Unlike Trendy materialists they are much less obsessed with money, and take care about themselves much more.
- Relatively loose connection with family.
- Modestly interested in security (safe job etc) and routine.
- Very much interested in practicing sports (only trendy materialists are better than them).
- Modestly interested in taking care about weight, health pages and vitamins.
- They are very ambitious, they set high goals, want to advance in career much.
- They are very outgoing – they go out much, and they would go even more out (if only possible), they hate spending night in front of TV.
- They don't like to stand still, always looking for novelties and challenges. In their case that sometimes includes taking risks and fast driving.
- They like to stand out, but that is not such an obsession as in case of trendy materialists. They like being watched by others, to impress the others. Their car should reflect their personality. They like competition. They are fighters.



# LIFESTYLE DESCRIPTION

## - Trendy balanced

- They are “in”, they are well informed about popular places, they wear trendy clothes. They insist in those things (but not in the degree of trendy materialists).
- They like branded products. They like advertised products.
- They often don't pay much attention to lowers prices, discounts, cheaper products.
- Although trendy, they don't insist on expensive things and people who have them . Money is not that high measure of quality.
- Modestly interested in money and its role.
- They like shopping and buying things that they like (no matter of price)
- They are not the first nor the last to try new products.
- They are impulsive, but not as much as trendy materialists.
- Somewhat more male, very young, still in education or better and/or educated, better affluent. They mostly rarely participate in decision making regarding everyday shopping.

# LIFESTYLE DESCRIPTION

## - Conservative Balanced

- 16% of population.
- They are family oriented, cautious (especially with money) people. Although not extroverted, they are interested in advancing in life, shopping... They are fighters in life, although they prefer certain routine.
  - Family is very much important to them.
  - They are very much interested in secure, steady life and routine.
  - Not interested in practicing sports.
  - They take care their weight, but they are even more interested in health pages and vitamins.
  - They are ambitious but would not put career at first place in life.
  - They don't go out much, although they would go if they had the opportunity. Night in front of TV is not a bad idea to them.
  - They look for novelties and challenges, but without risks and fast driving.
  - They don't like to stand out, don't like being watched by others, don't want to impress the others.
  - They are not "in", they are not well informed about popular places, they don't wear trendy clothes.

# LIFESTYLE DESCRIPTION

## - Conservative Balanced

- They are modestly interested in branded products, as well as in advertised products.
- They don't insist much on lower prices, discounts, cheaper products.
- They don't like expensive things and people who have them.
- Although very cautious about money, they have a negative attitude about the role of money.
- They enjoy shopping much.
- They are not the first nor the last to try new products.
- They are not impulsive, but very cautious with money.
- They are more female, mature, averagely affluent, participate much in everyday shopping.

# LIFESTYLE DESCRIPTION

## - Conservative Unexcited

- 18% of population.
- They are family oriented, cautious (especially with money). They are not extroverted, not interested in advancing in life, nor in career - it seems as if they worn out.
  - Family is very much important to them.
  - They are much interested in secure, steady life and routine.
  - Not interested in practicing sports at all.
  - They don't take much care about weight. Slightly more interested in health pages and vitamins.
  - They are not ambitious at all, not thinking about career much.
  - They don't go out (almost) at, nor they would go if they had the opportunity. Night in front of TV is an excellent idea to them.
  - They don't look for novelties and challenges. They try to avoid risks and fast driving.
  - They don't like to stand out, don't like being watched by others, don't want to impress the others.

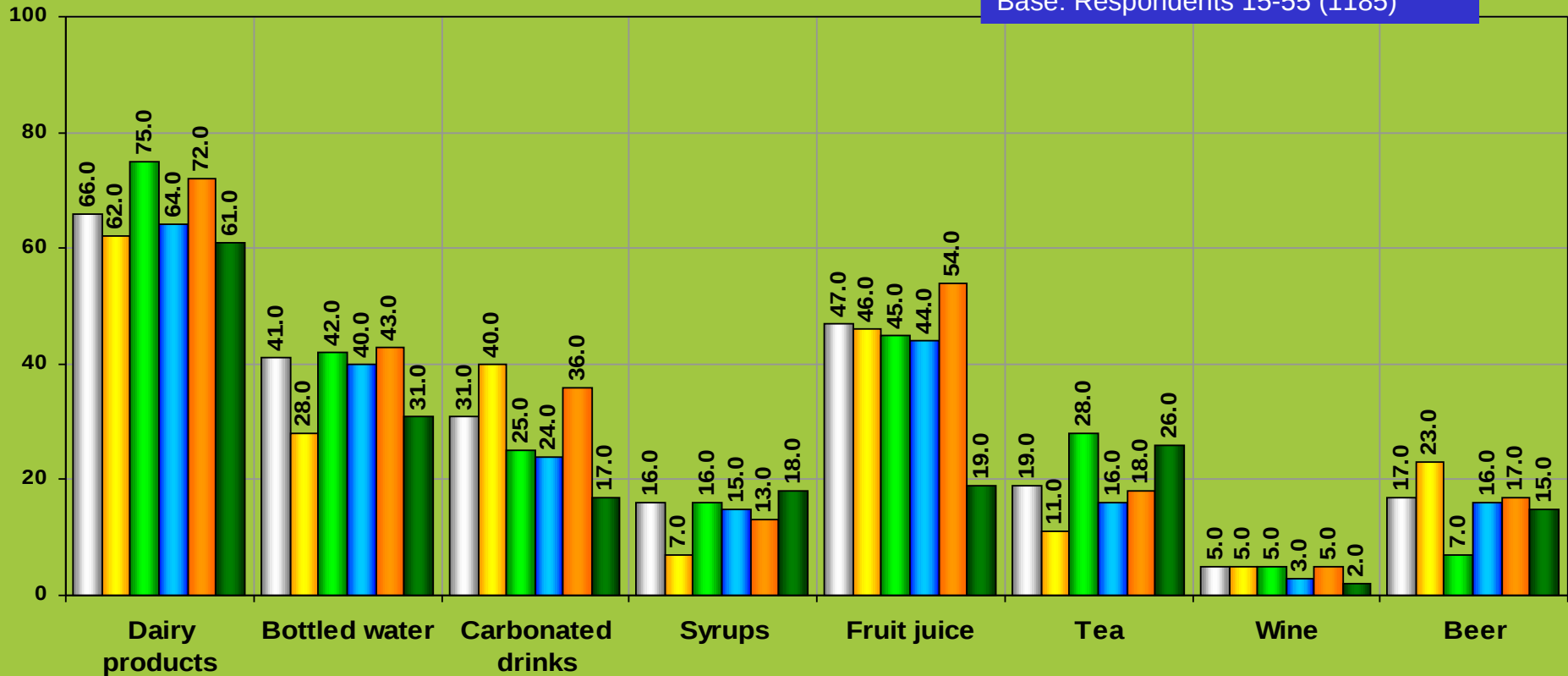
# LIFESTYLE DESCRIPTION

## - Conservative Unexcited

- They are not “in”, they are not well informed about popular places, they don't wear trendy clothes.
- They don't like branded products. They don't like advertised products.
- They usually insist on lower prices, discounts, cheaper products.
- They don't like expensive things and people who have them.
- Although very cautious about money, they have a negative attitude about the role of the money.
- They don't like shopping that much.
- They are the last to try new products.
- They are not impulsive, but very cautious with money.
- They are more female, pretty old, less affluent and less educated.

# DRINKS - 24 HOURS INCIDENCE (%)

Base: Respondents 15-55 (1185)



Rational Reserved  
 Rational Achievers

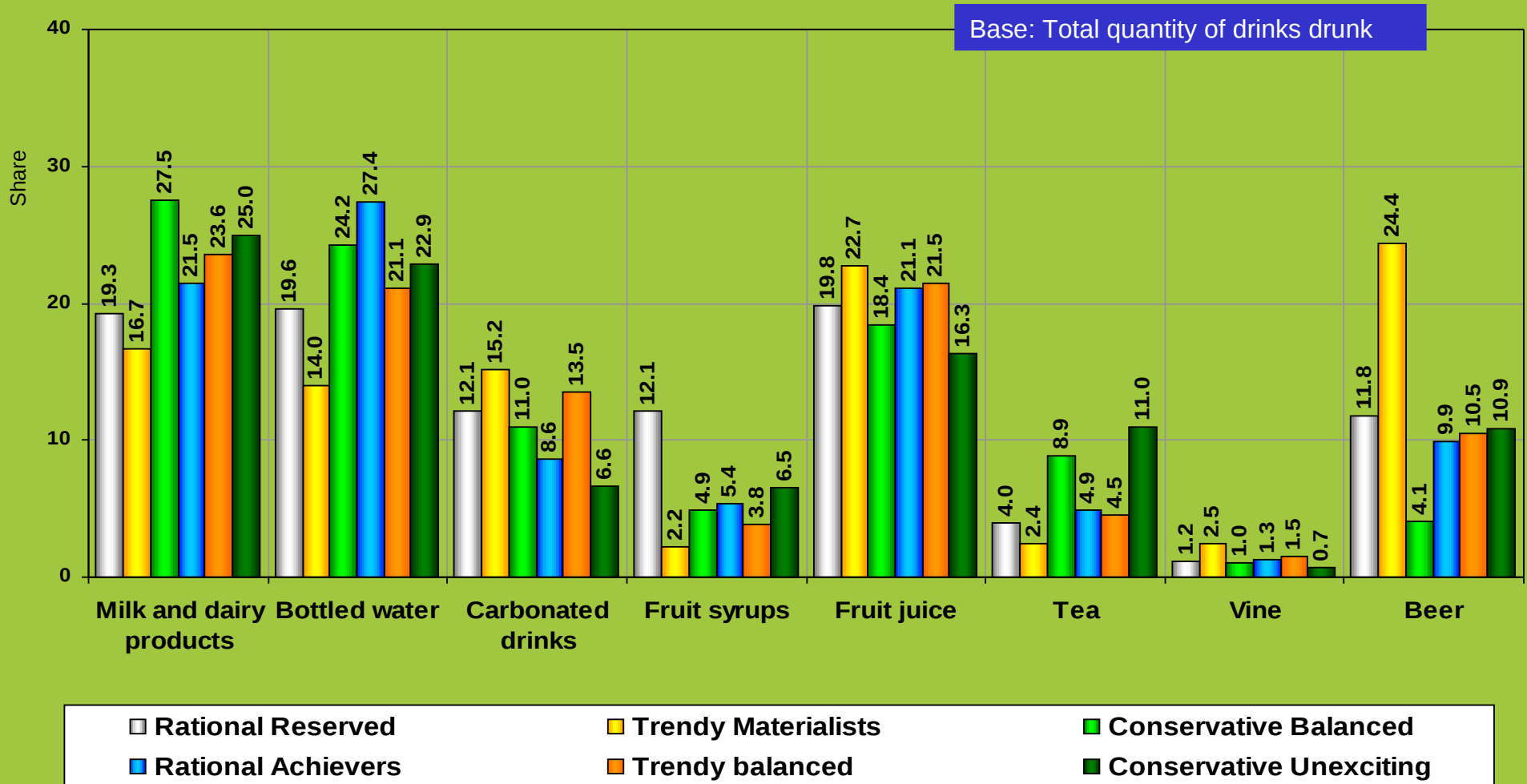
Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexciting

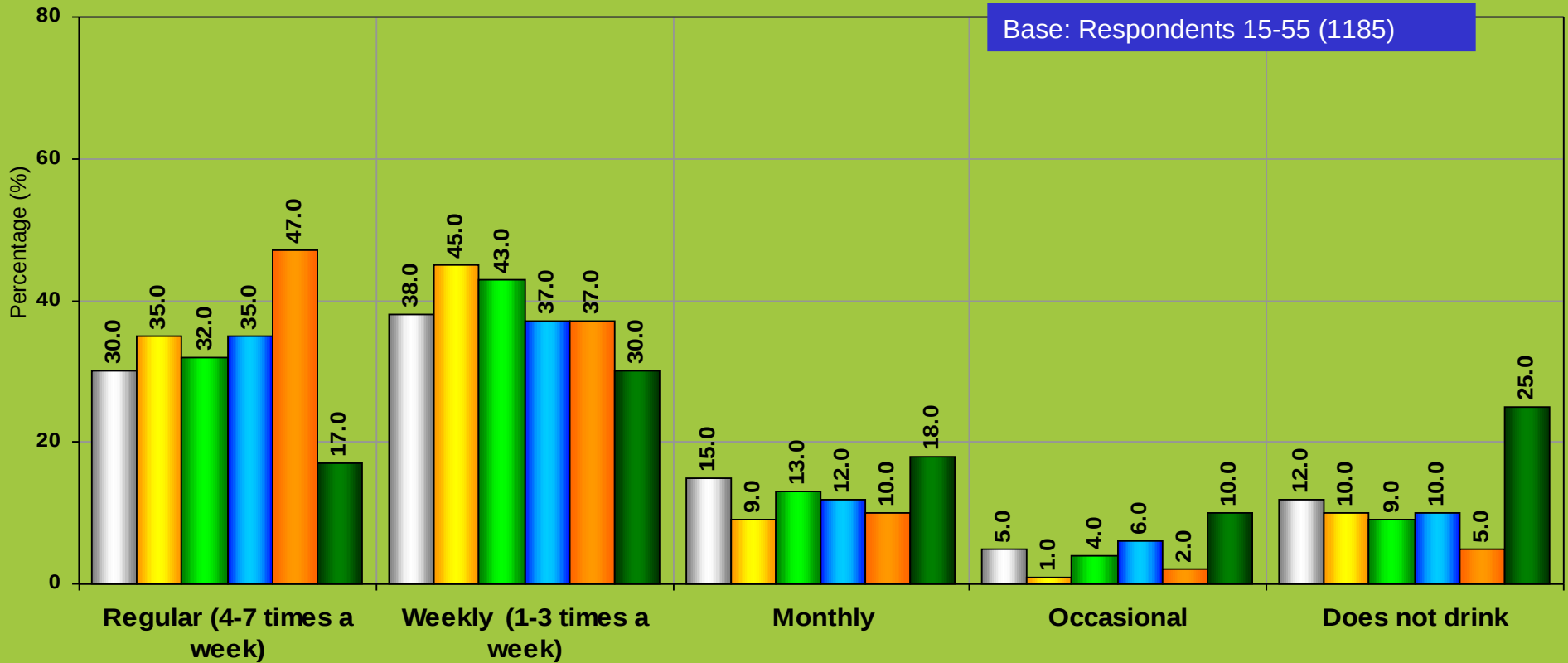




# DRINKS - Stomach share



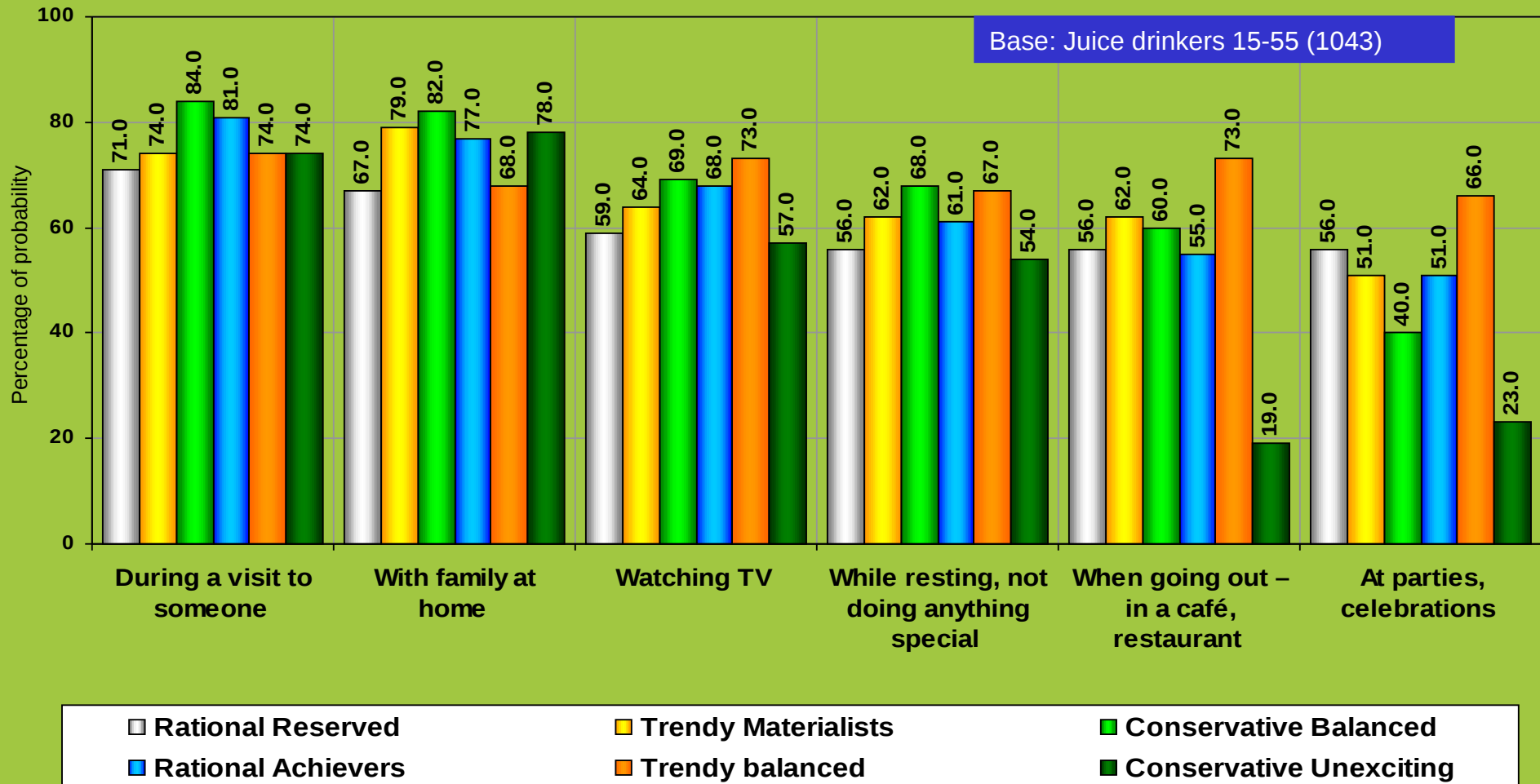
# Frequency of juice consumption



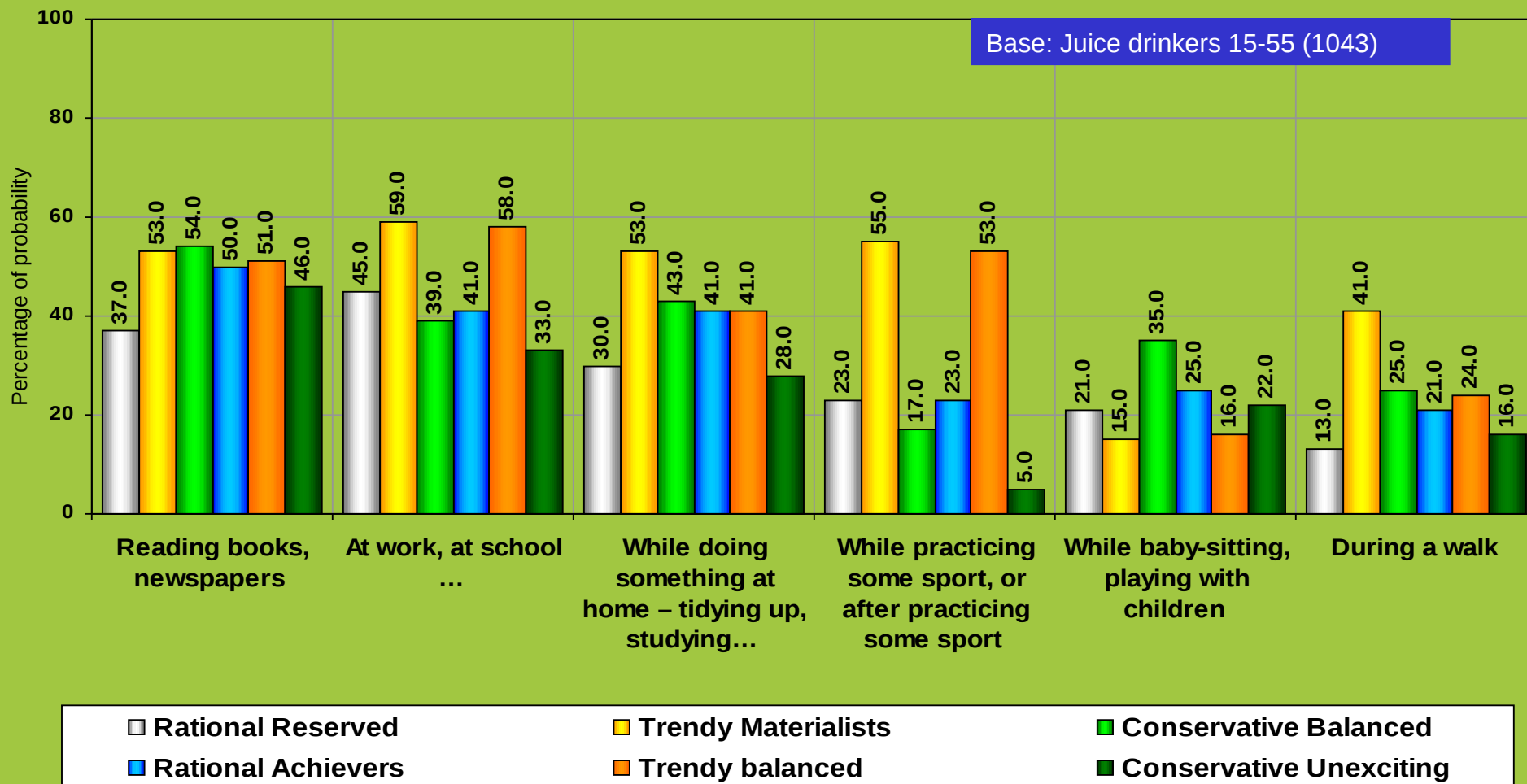
Rational Reserved
  Trendy Materialists
  Conservative Balanced

Rational Achievers
  Trendy balanced
  Conservative Unexciting

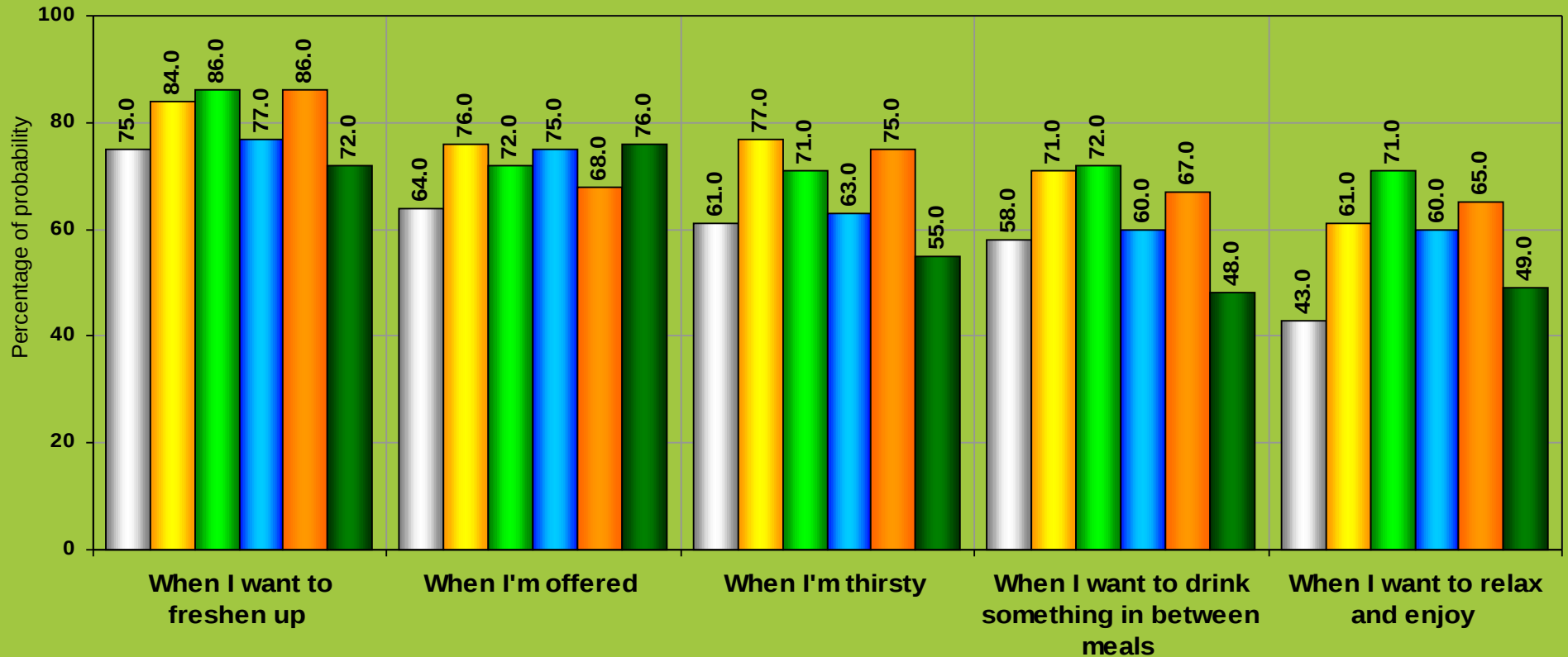
# Juice consumption - Occasions 1



# Juice consumption - Occasions 2



# Juice consumption - Motives 1



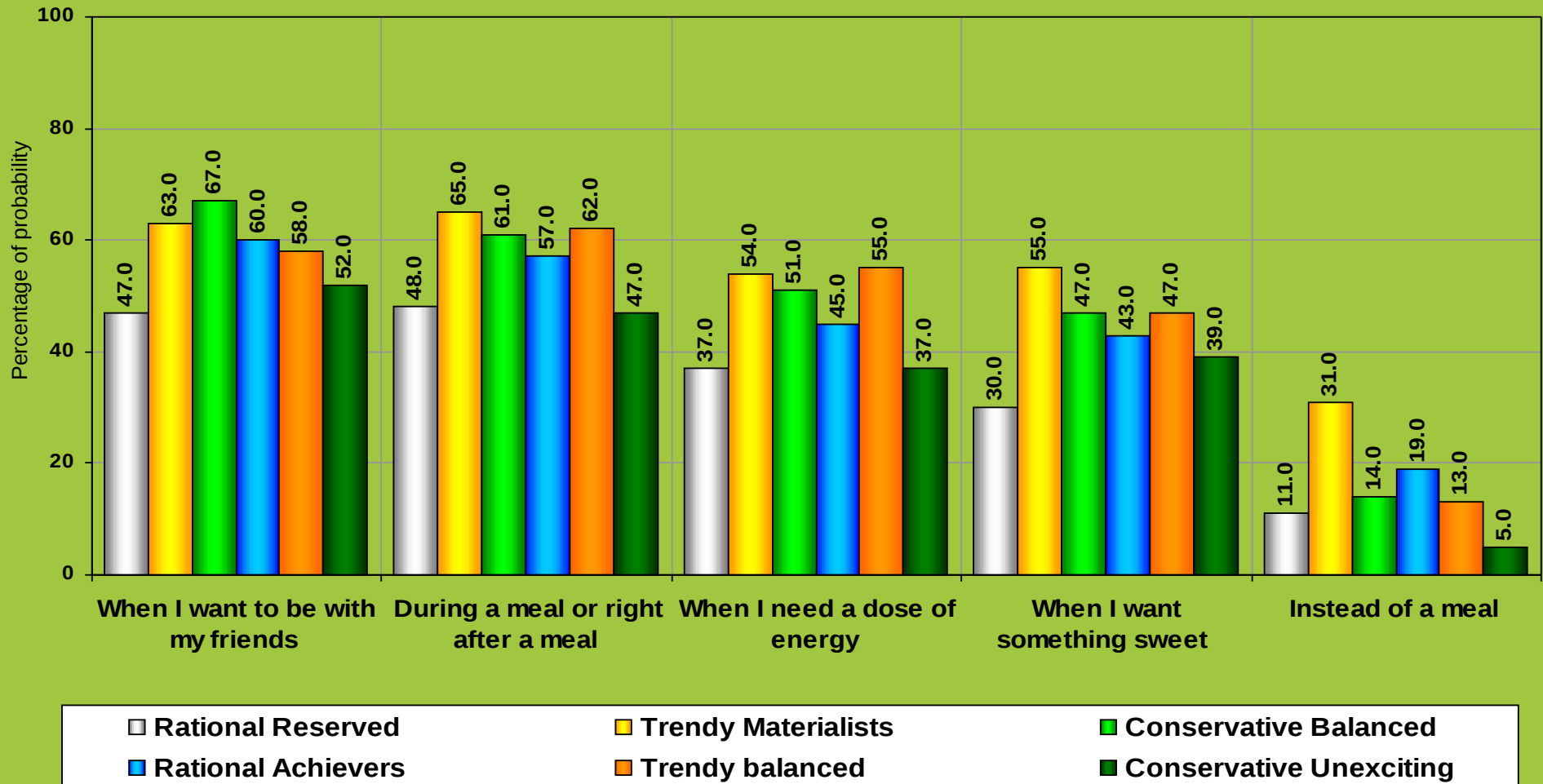
Rational Reserved  
 Rational Achievers

Trendy Materialists  
 Trendy balanced

Conservative Balanced  
 Conservative Unexciting



# Juice consumption - Motives 2



# Juice consumption

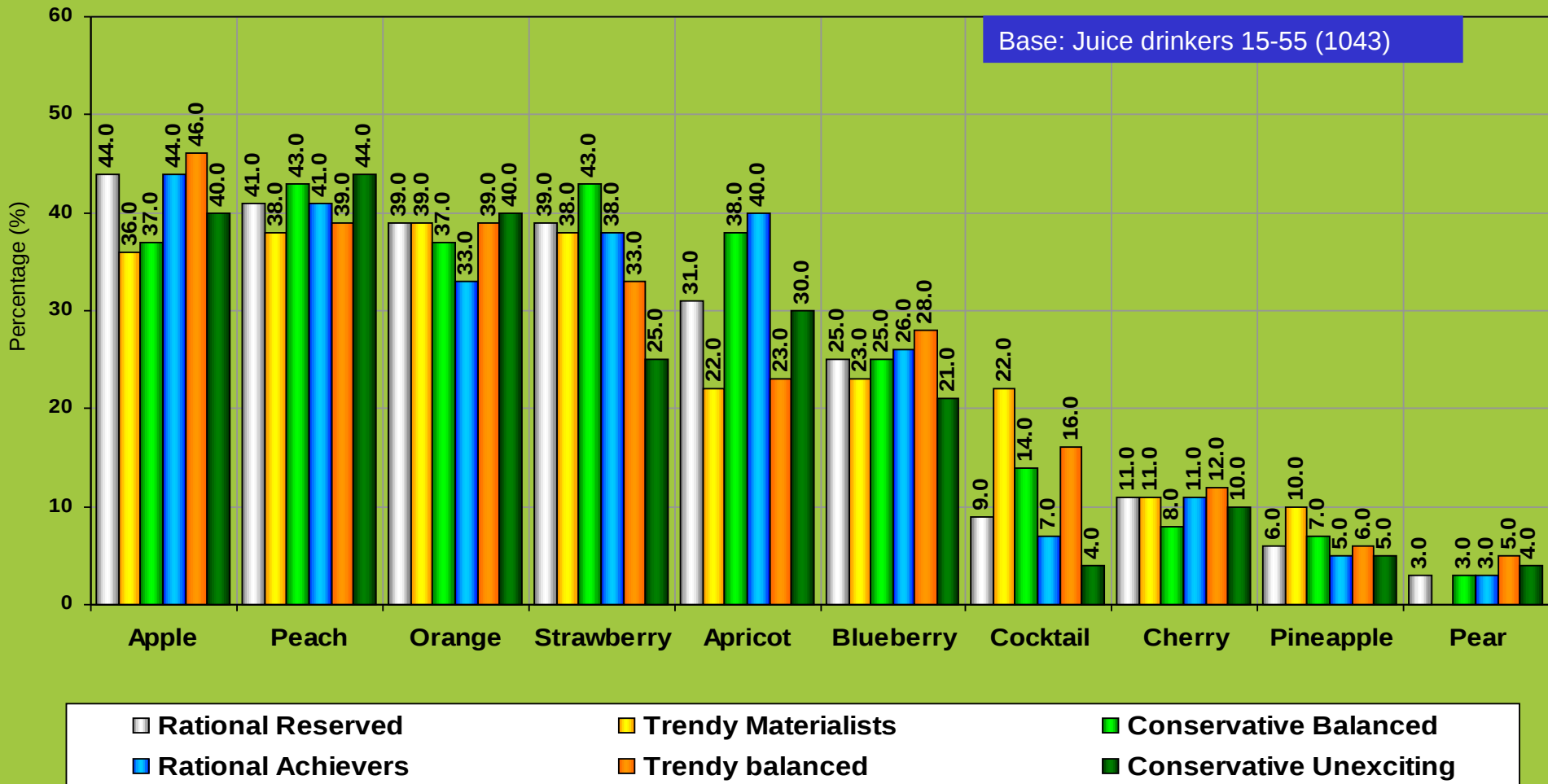
- Rational Reserved:
  - Somewhat more often (than avg) at parties; refreshing motive.
- Trendy materialists:
  - All kinds of social gathering, but also at work, school, while parasitizing sports...; often instead of meal, and as a sweet, energetic dose.
- Conservative Balanced:
  - Family gathering (including visiting someone) and social occasions/ motives.
- Trendy balanced:
  - HORECA, parties, sport, at work; juice as an energetic doze.
- Rational Achievers:
  - All kinds of social gathering.
- Conservative Unexcited
  - Family gathering; often wait to be offered.

# Juice brands

- Rational Reserved:
  - Generally they follow standard pattern (Next – Nectar – Moc prirode etc), but often know/consume “other” i.e. rare brands.
- Trendy materialists:
  - Like much advertised brands (Next and Nectar) and foreign brands (Bravo)
- Conservative balanced:
  - Look for affordable mainstream brands (Nectar, Moc prirode, SU voce), but Next is still important.
- Trendy balanced:
  - Apart from standard pattern (Next – Nectar – Moc prirode etc), they like foreign brands.
- Rational Achievers:
  - Look for affordable mainstream brands (Nectar, Moc prirode, SU voce), but Next is still very important.
- Conservative Unexcited
  - Somewhat more than avg oriented toward SU voce and/or Moc prirode.

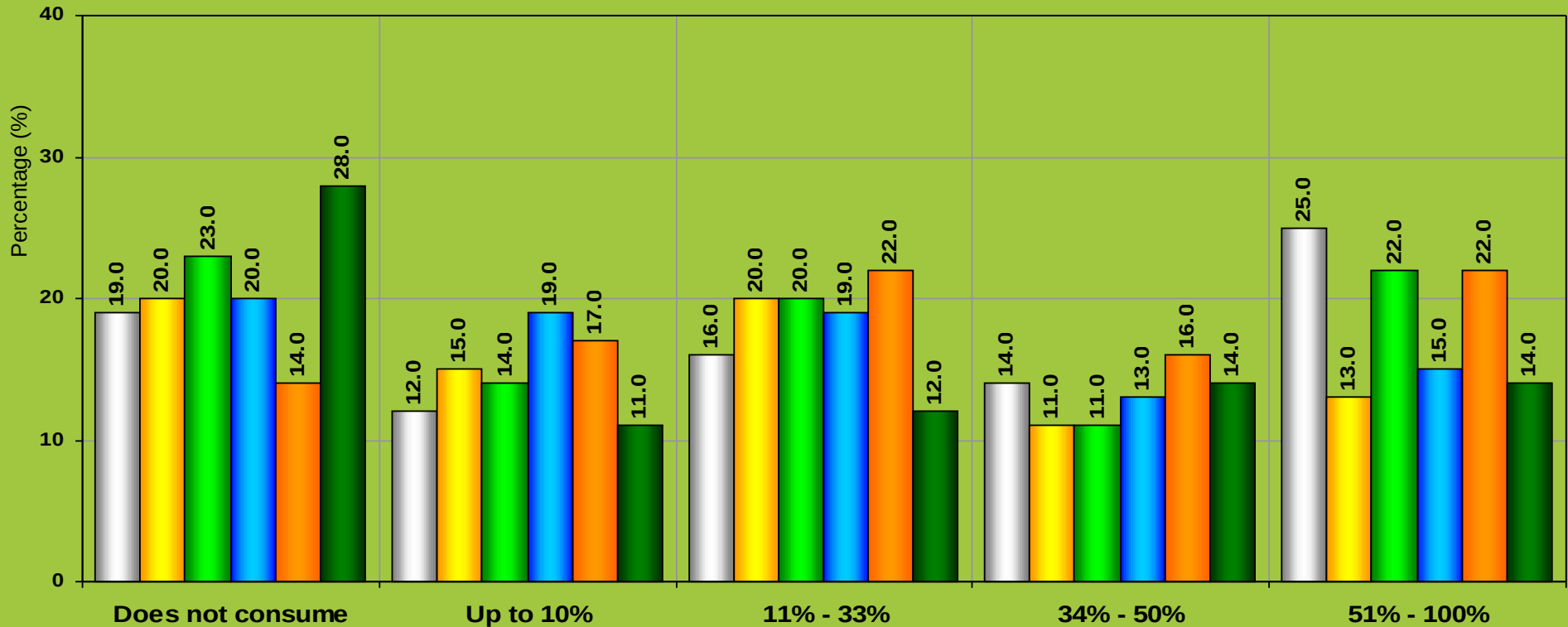


# Flavors - Favorite flavors - All three choices



# When we talk about total quantity of juices that you drink, what is the percentage of pure orange juice in that?

Base: Juice drinkers 15-55 (1043)



■ Rational Reserved
■ Trendy Materialists
■ Conservative Balanced  
■ Rational Achievers
■ Trendy balanced
■ Conservative Unexciting

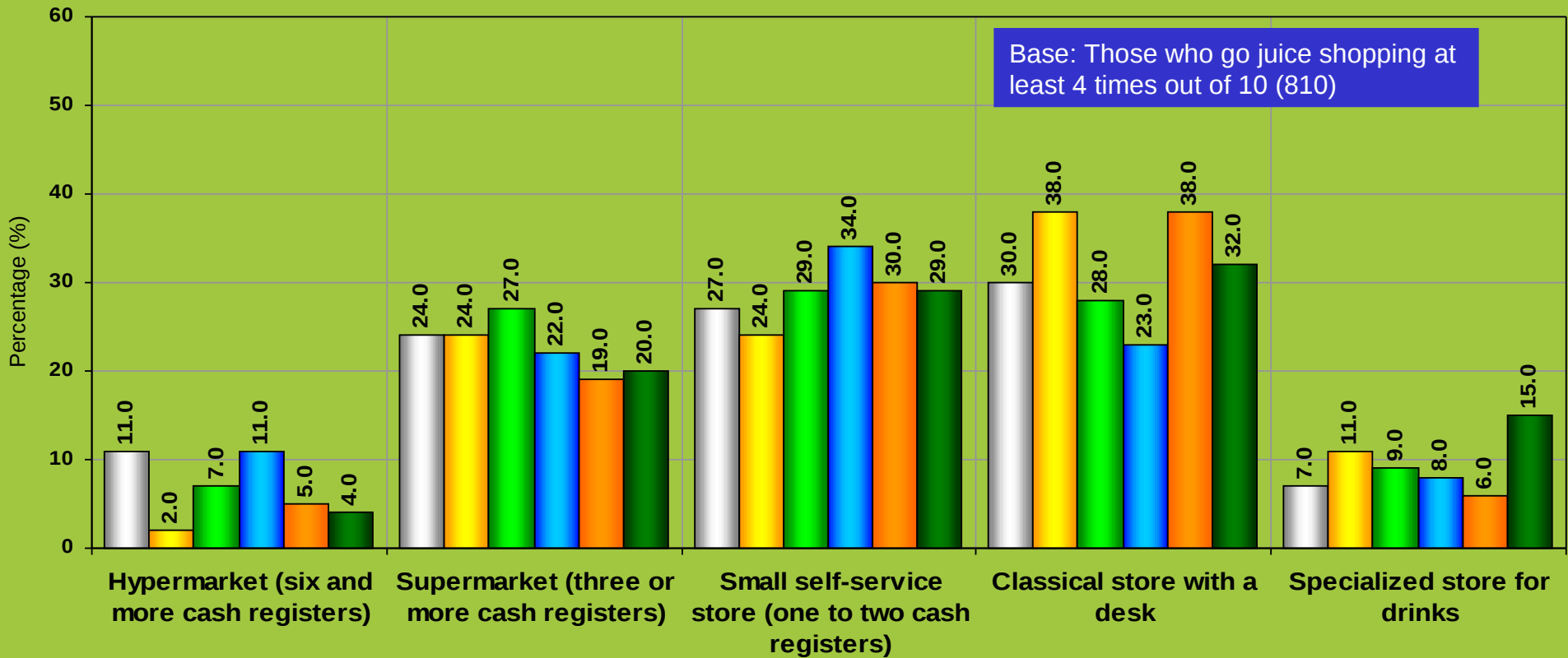


# Flavours

- Rational Reserved:
  - Orange, apple, peach, blueberry...
- Trendy materialists:
  - Orange, apple, cocktail
- Conservative Balanced:
  - Peach, strawberry, orange (some of them like OJ much)
- Trendy balanced:
  - Apple, orange (including OJ), peach, strawberry...
- Rational Achievers:
  - Peach, apple, apricot, strawberry...
- Conservative Unexcited:
  - Apple, apricot, peach (orange yes, but not OJ that much)



# In what kind of store do you usually buy juices?



□ Rational Reserved

□ Trendy Materialists

□ Conservative Balanced

□ Rational Achievers

□ Trendy balanced

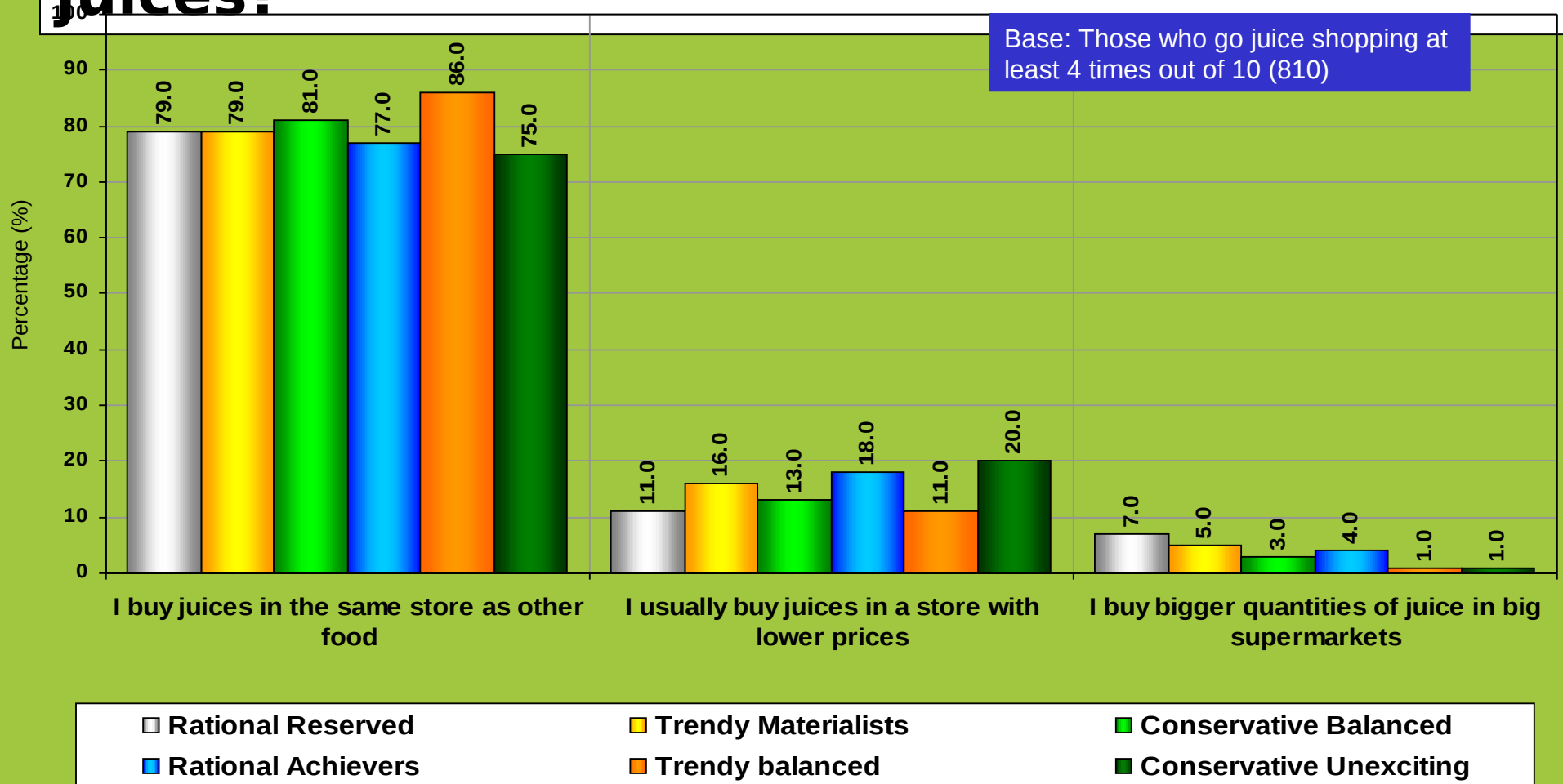
□ Conservative Unexciting



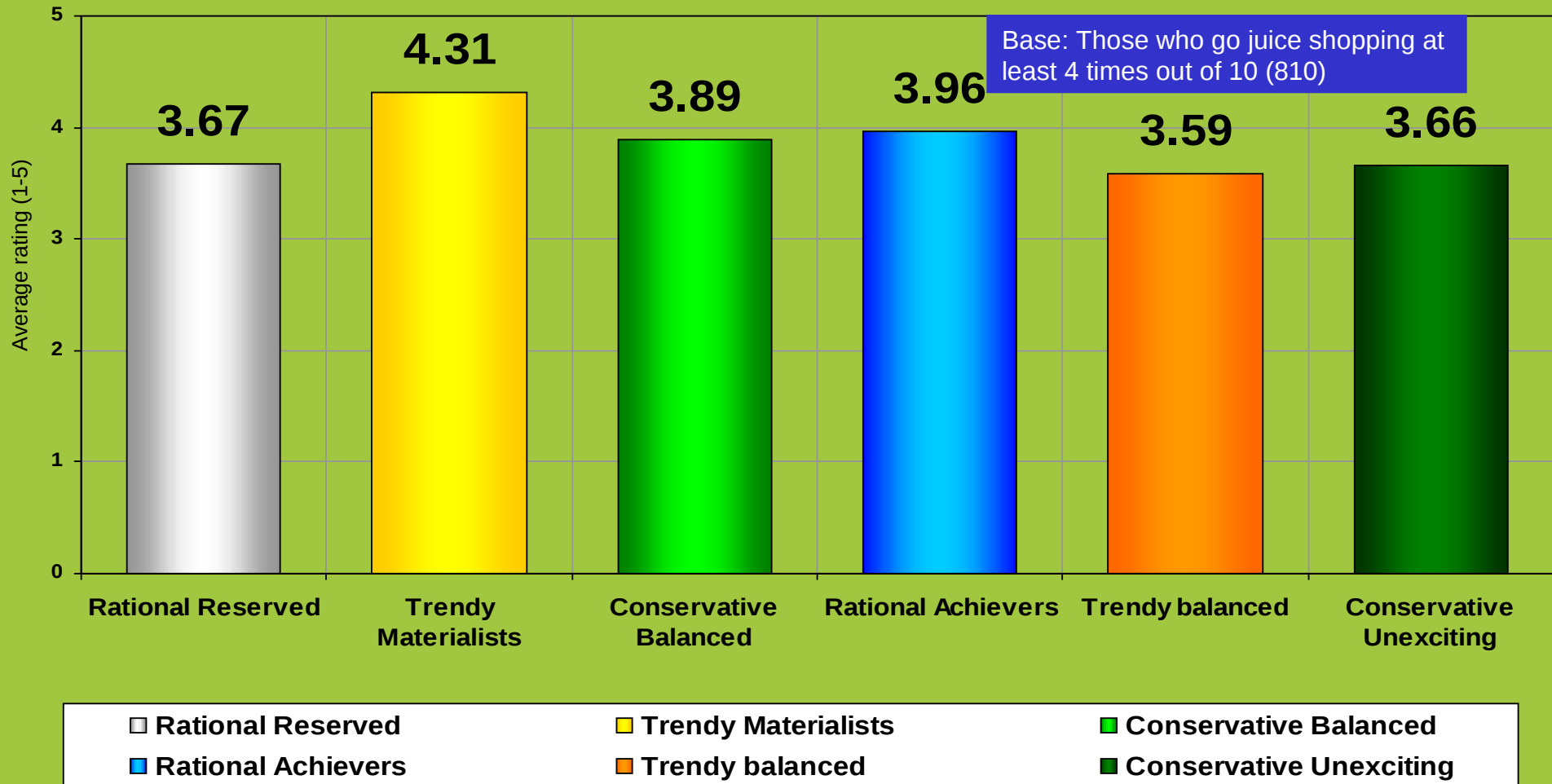
**FOCUS**  
FOOD CONSUMER SCIENCE IN THE BALKANS



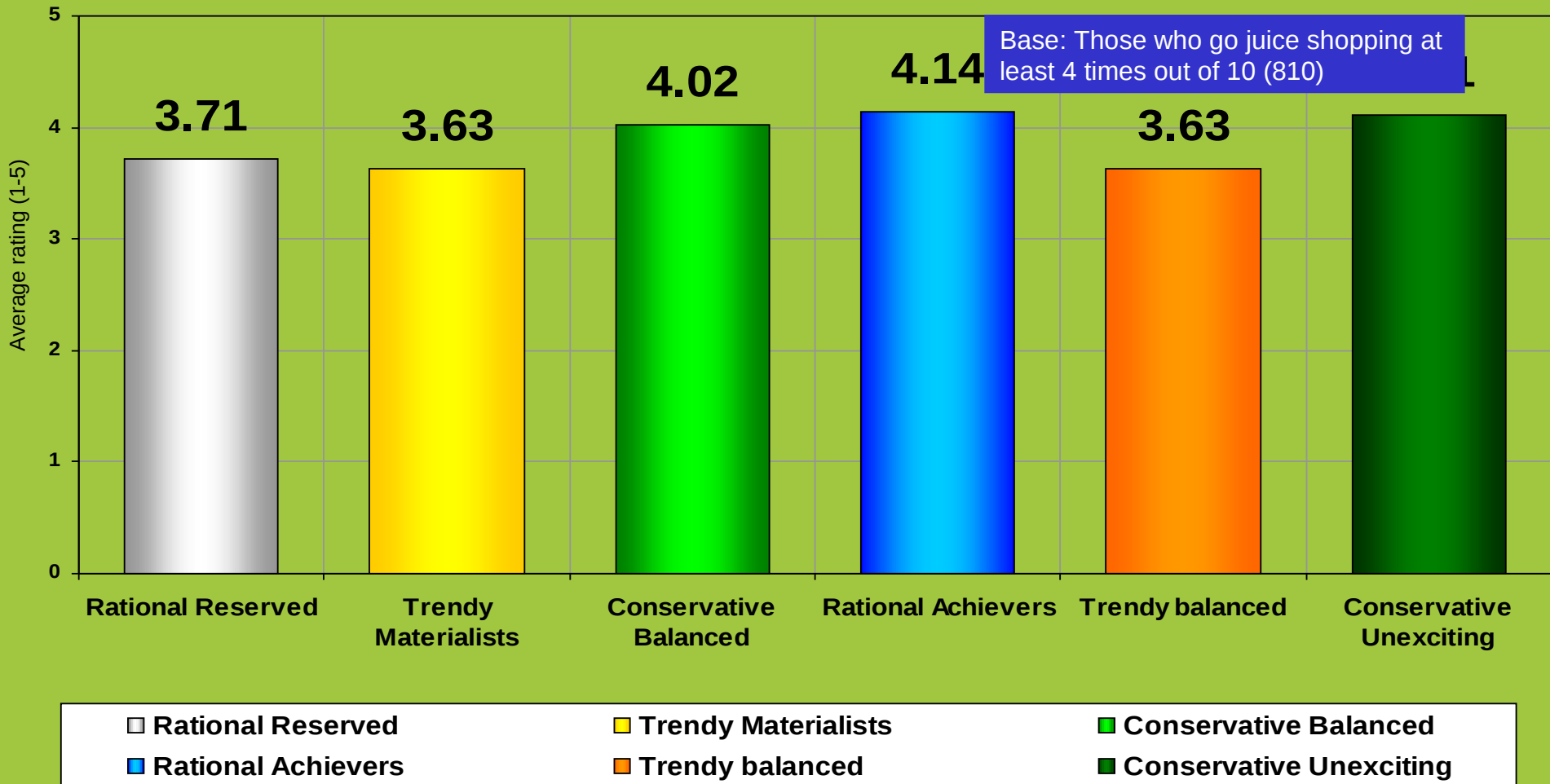
# How would you describe your purchase of juices?



# BRAND - How important is it



# PRICE - How important is it



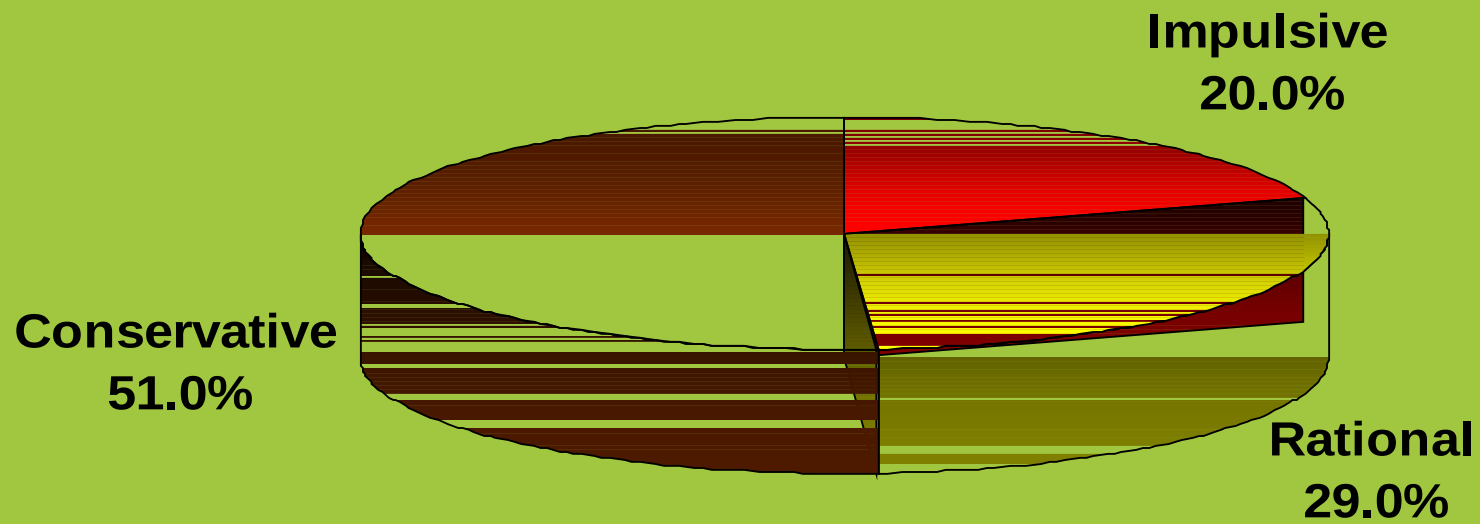
# Shopping behavior

- Rational Reserved:
  - Hypermarkets and other self-service, groceries also; looking for wide choice of products with kind staff (pretty demanding); insist only on juice (flavor or brand somewhat less important).
- Trendy materialists:
  - Groceries and self-service; looking for wide choice of products but close; insist on brand.
- Conservative Balanced:
  - Supermarkets; looking for wide choice of products and kind staff; insist on price and flavor mostly; admit they are sometimes prone to impulsive shopping.
- Trendy balanced:
  - Groceries and self-service; looking for wide choice of products but close shop with kind staff (pretty demanding); insist on flavor mostly; admit they are sometimes prone to impulsive shopping.
- Rational Achievers:
  - Smaller and other self-service, groceries; looking for wide choice of products; insist on flavor and price.
- Conservative Unexcited
  - Liquor discounts; looking for the closest store; insist on price.

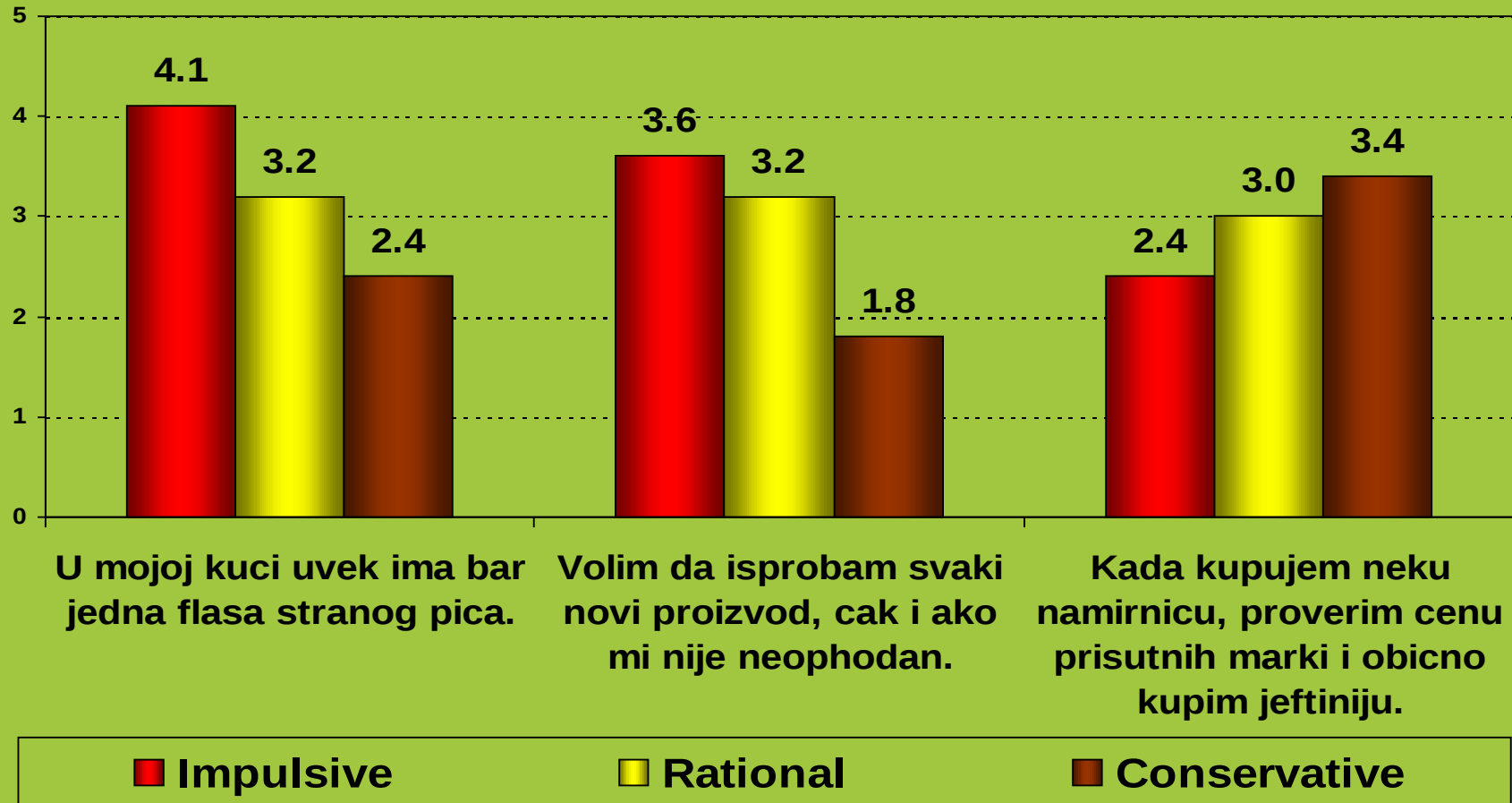


# Life stile segmentation for coffee producer - Second example

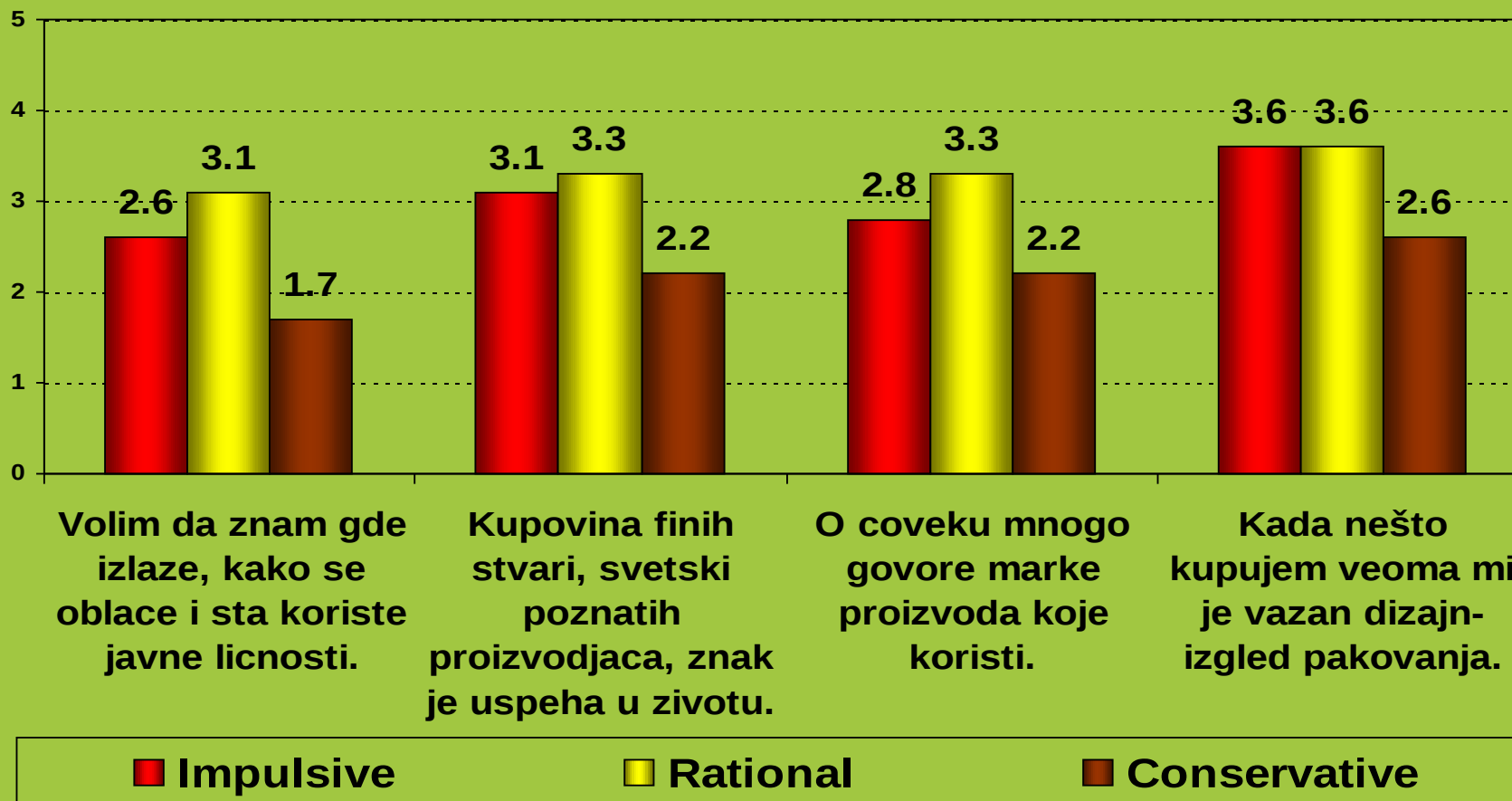
# Presence of different life style segment types in a population among coffee drinkers



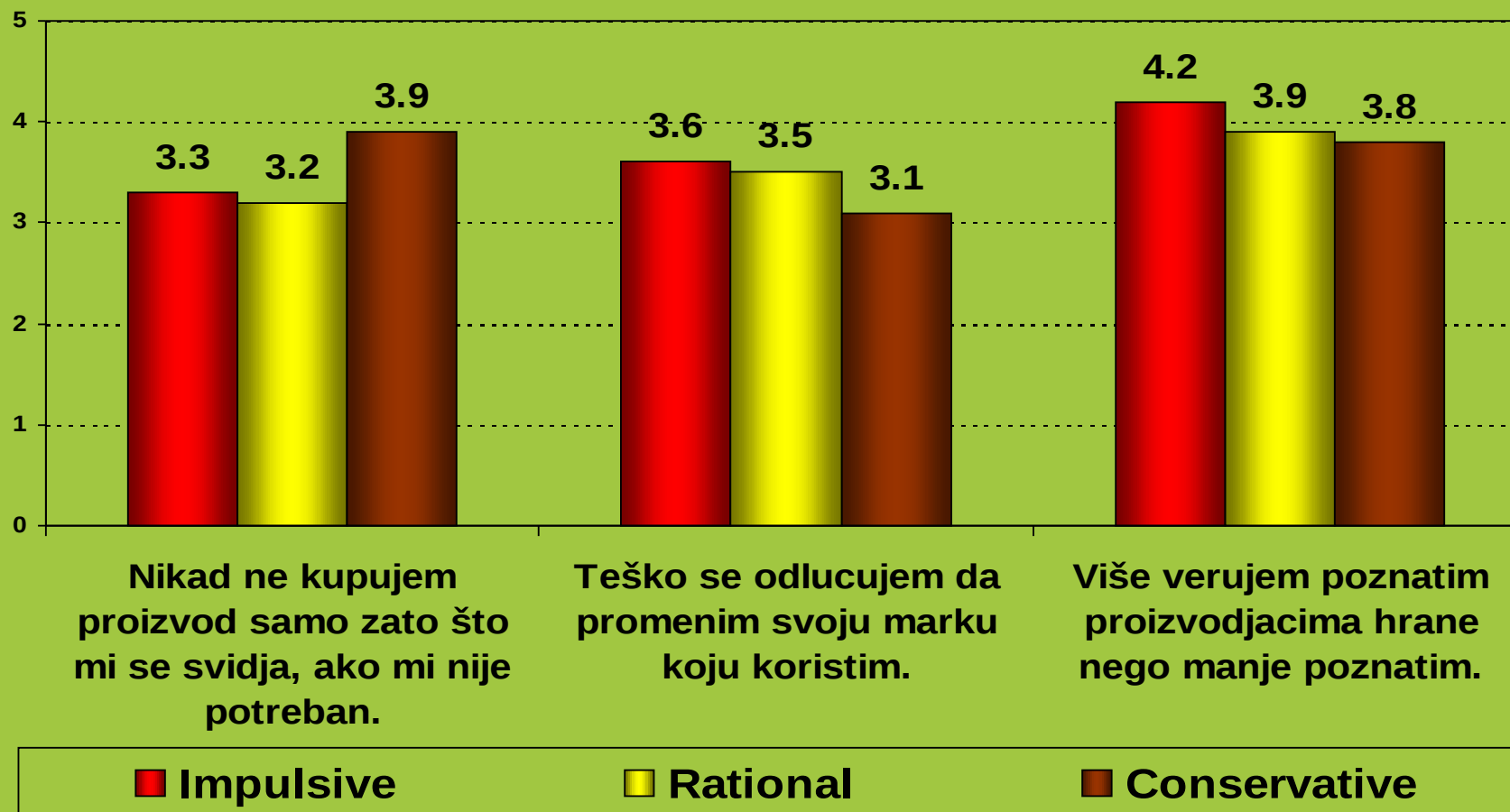
# Consumer Behavior



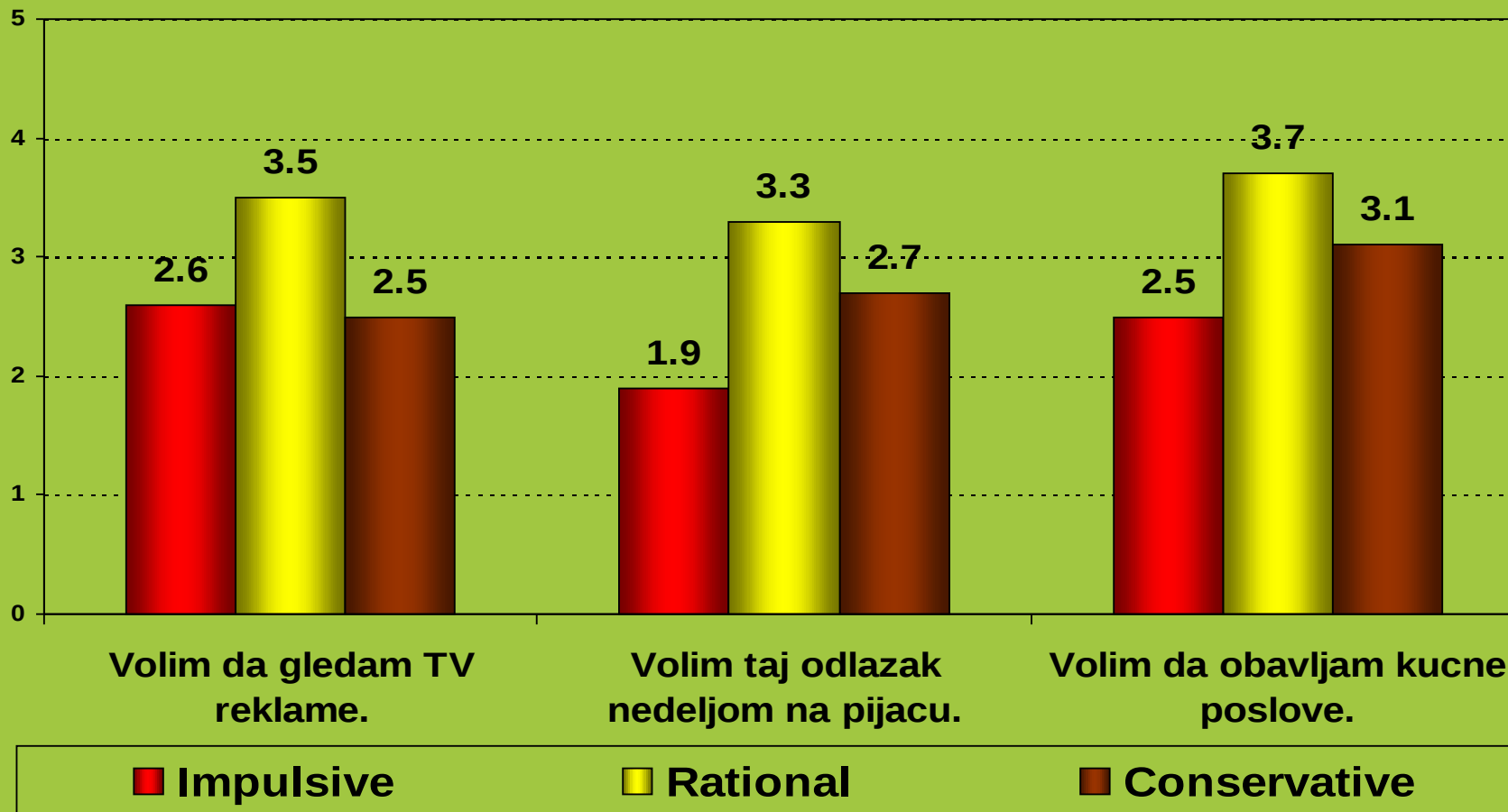
# Attitude toward status symbols



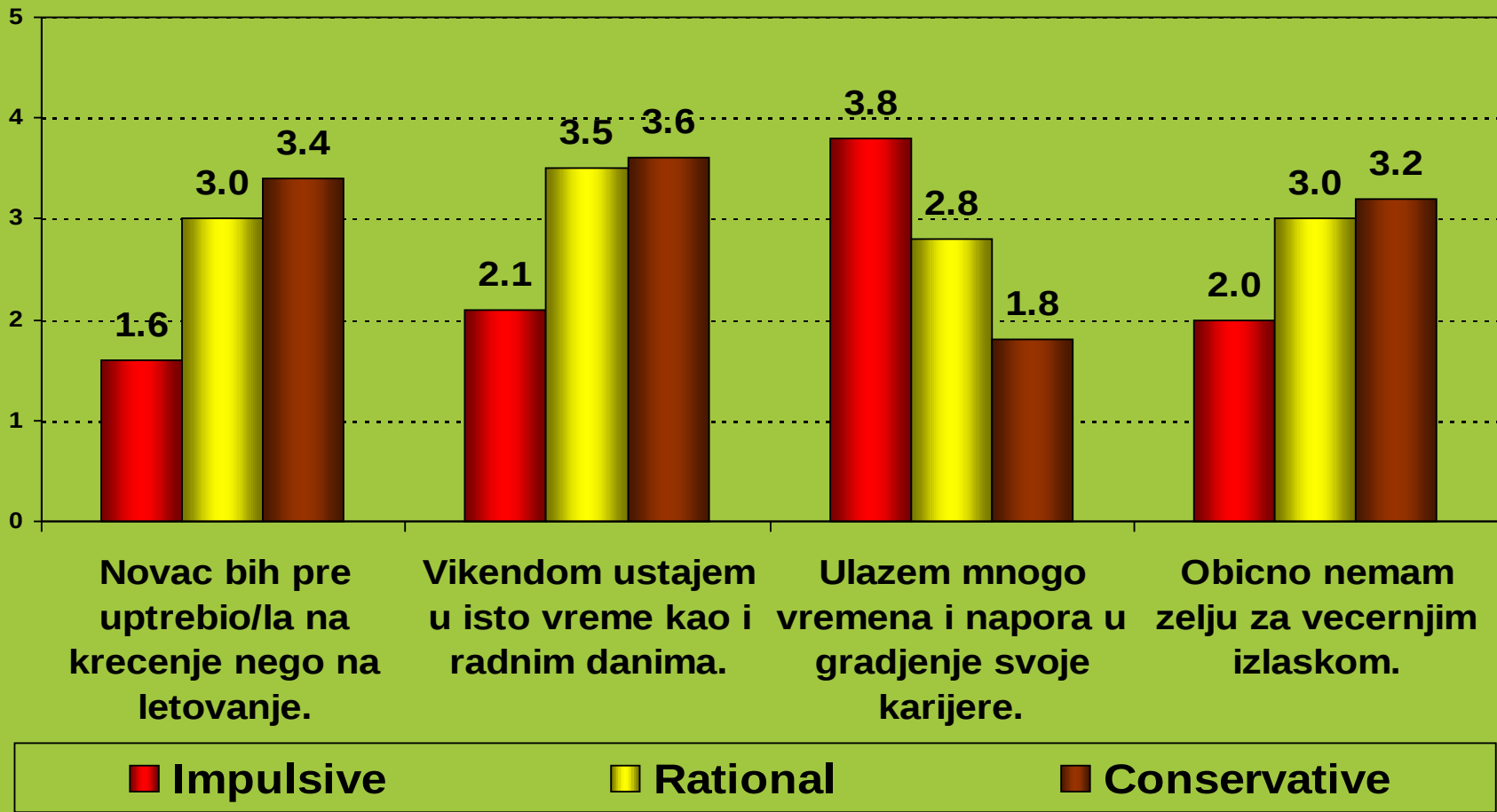
# Consumer behaviors



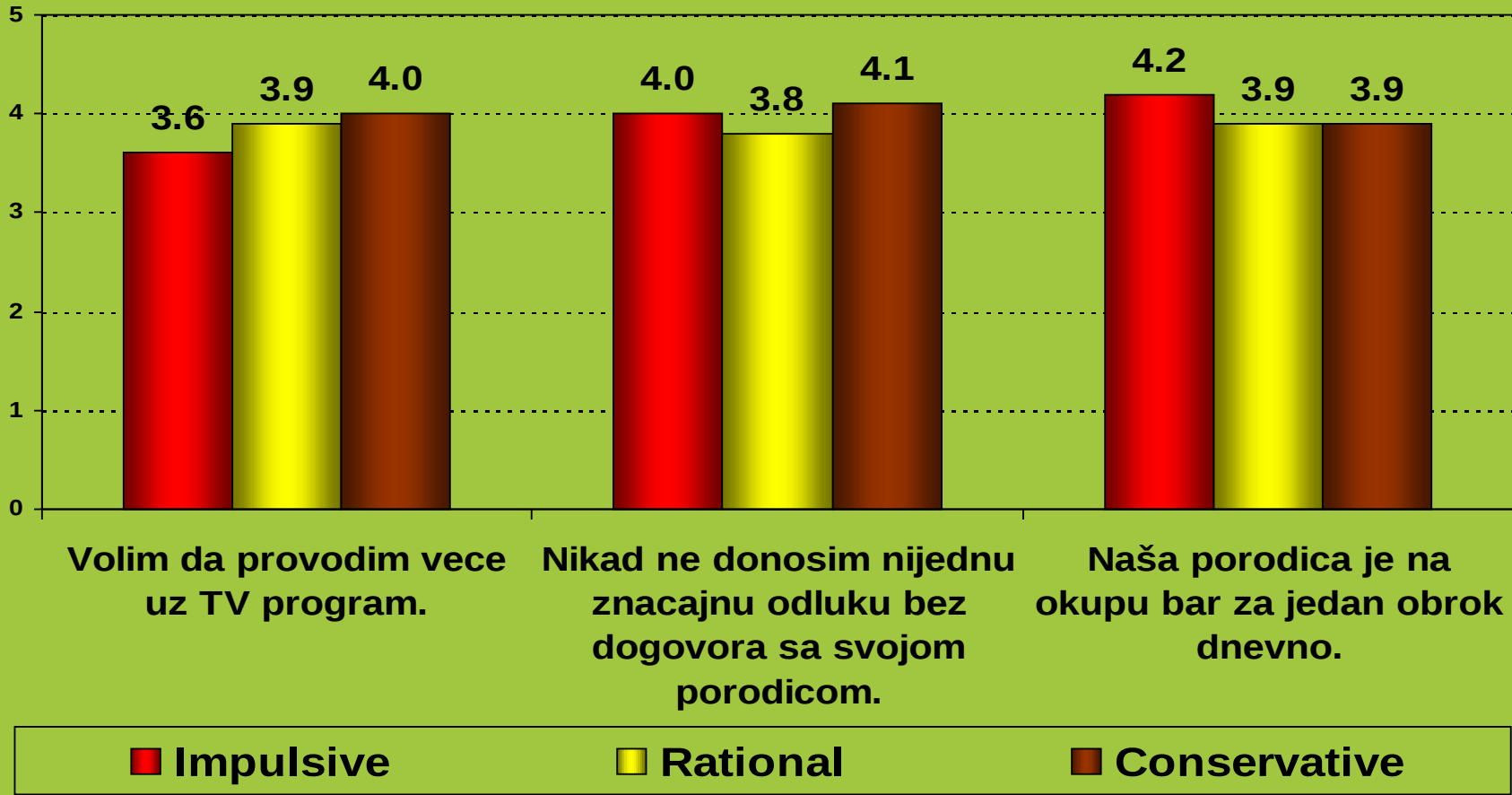
# Orientation: home/ outside



# Orientation: home/ outside

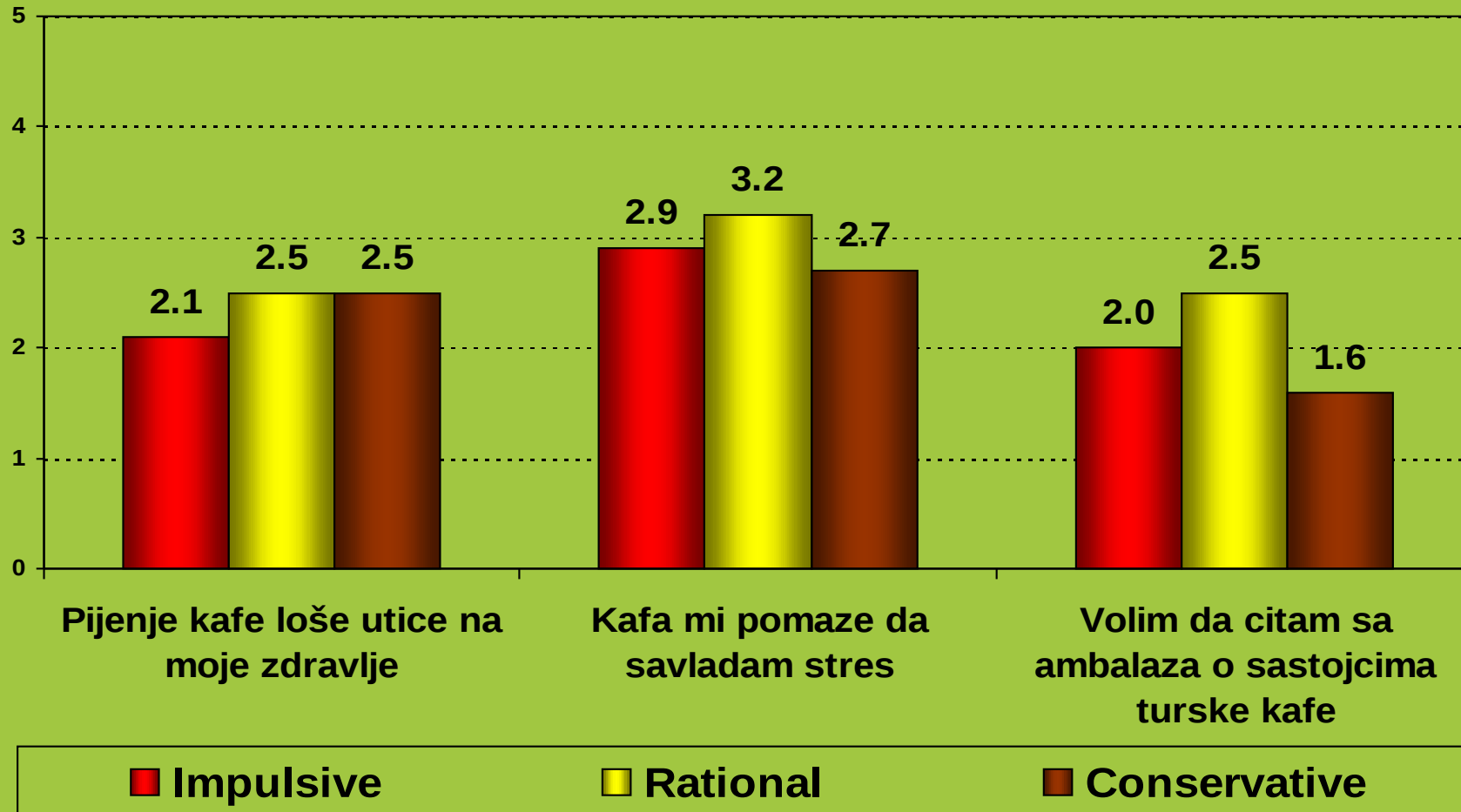


# Orientation: home/ outside

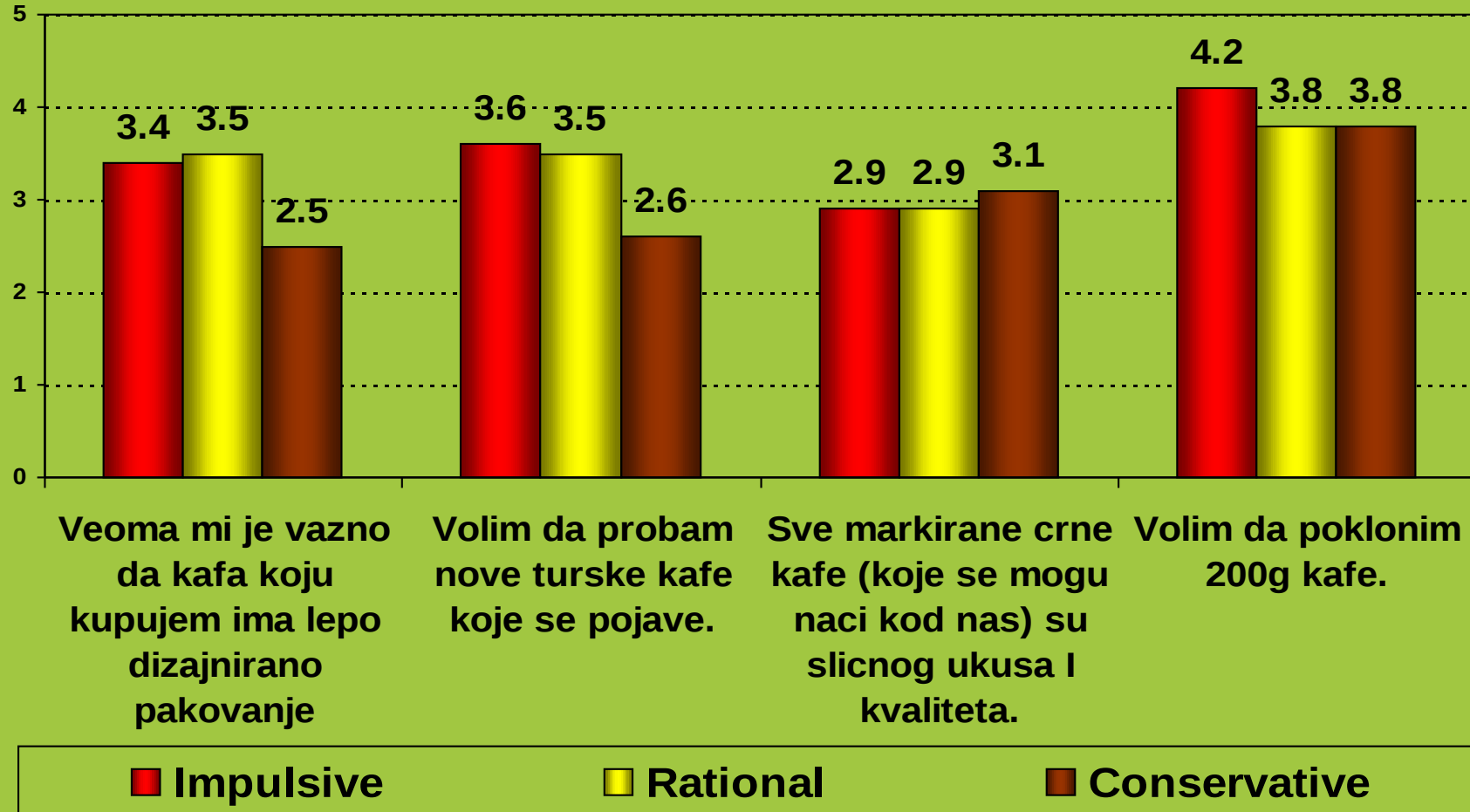




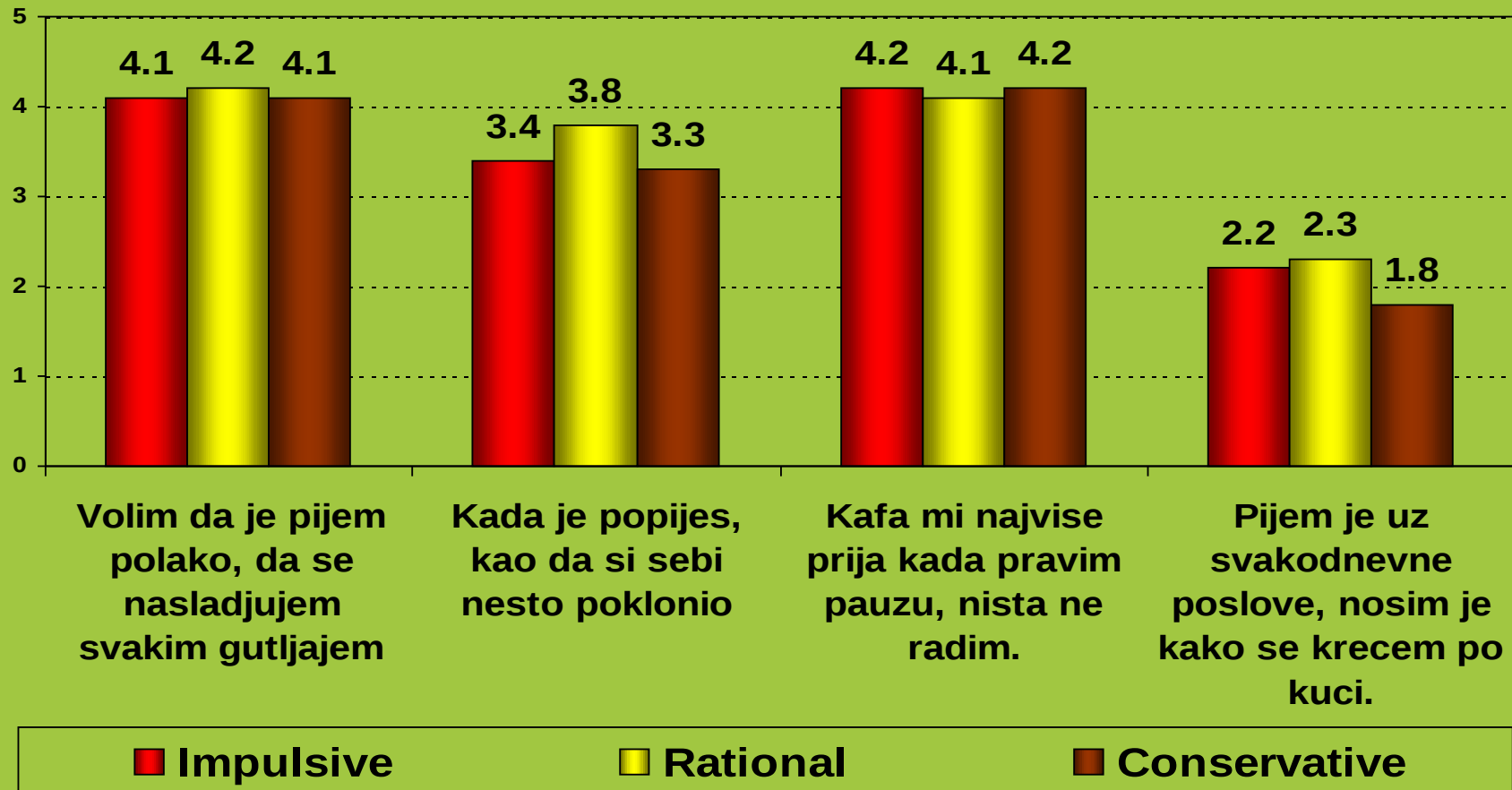
# Attitudes toward Turkish coffee



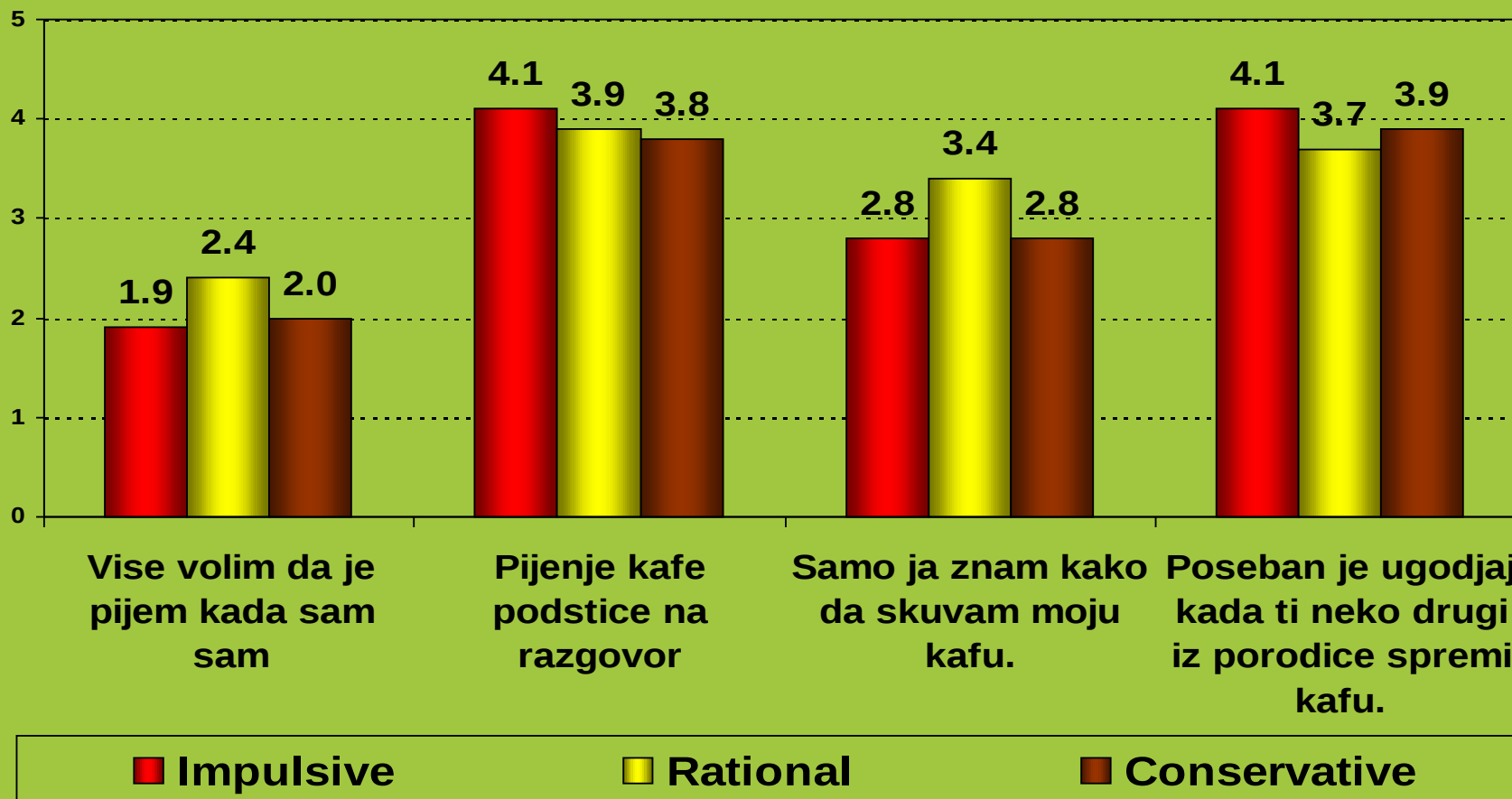
# Attitudes toward Turkish coffee



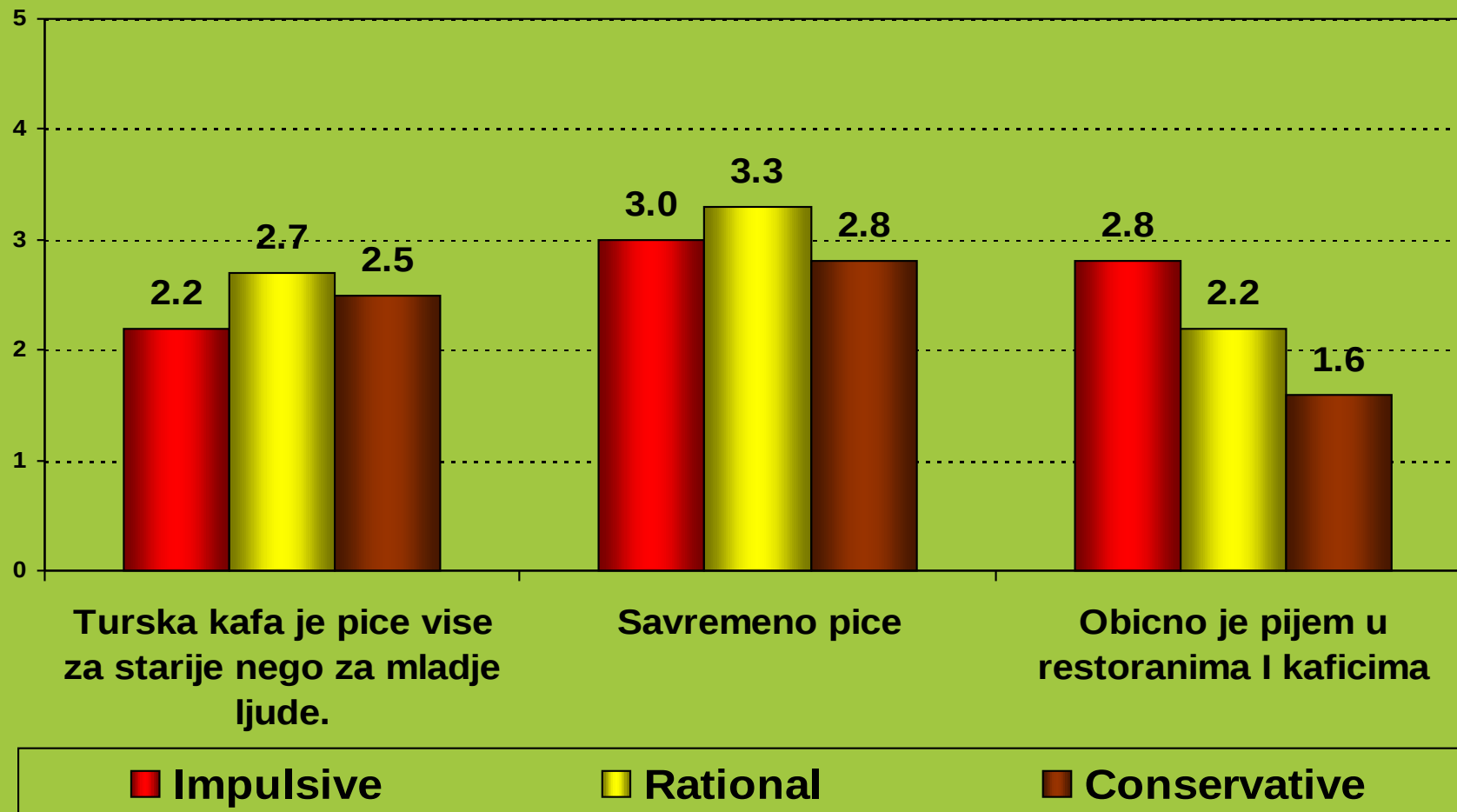
# Attitudes toward Turkish coffee



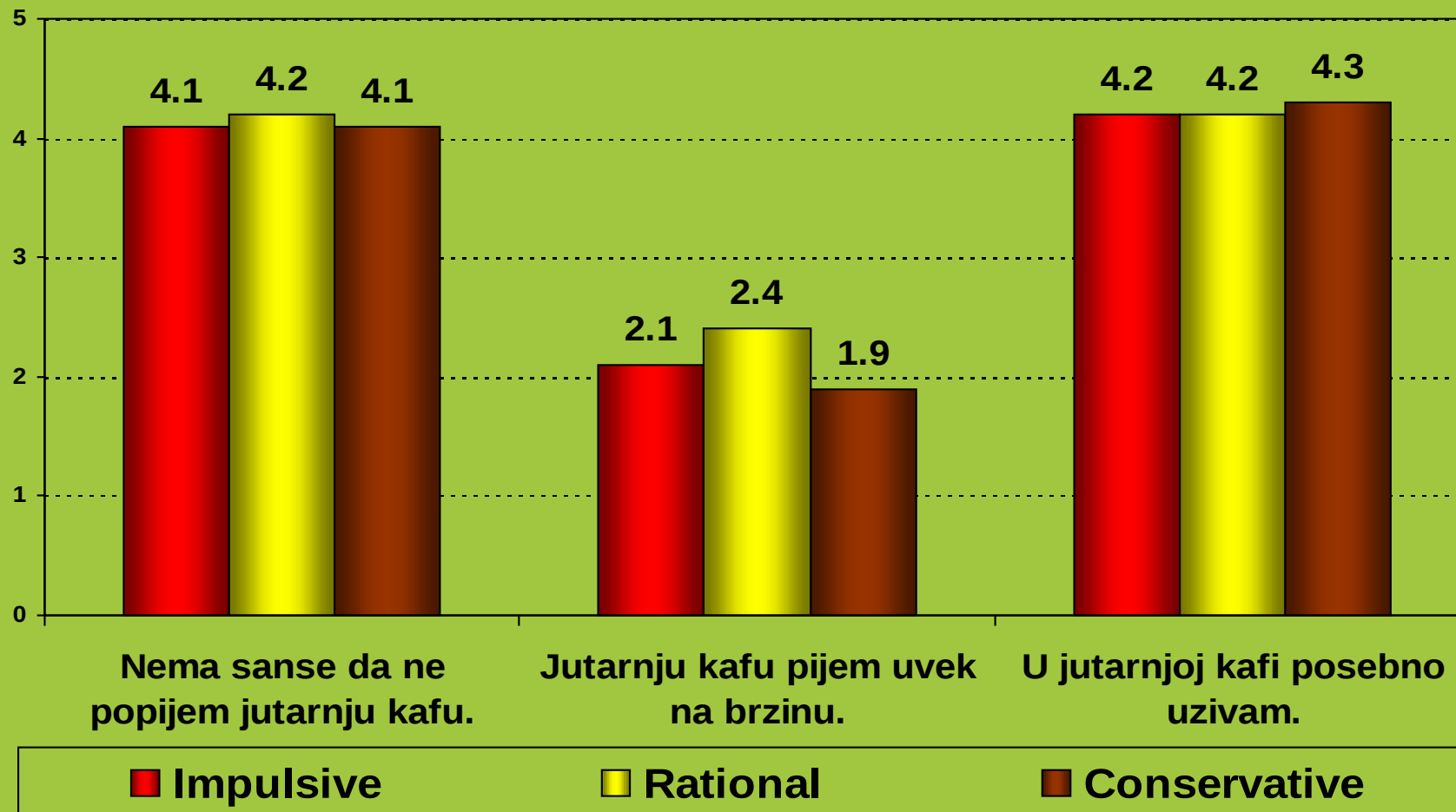
# Attitudes toward Turkish coffee



# Attitudes toward Turkish coffee



# Attitudes toward Turkish coffee



**Thank you!**