Consumer quantitative survey
- WP9 -
The main aim of quantitative research of WP9 in Focus Balkans project is analysis of drivers and determinants of food consumption behavior in targeted segments (fruit, food with health claims, organic food and traditional food) in WBC.

To measure the quantitative aspects that are identified in the four qualitative consumer studies: WP 5, 6, 7, 8.

To quantify with the same methodology different aspects of food behavior, image and values, that are given to food product by local consumers in all 6 WB countries.
Quantitative research in Focus Balkans – methodology

- **Data collection method**: ad hoc *face-to-face* survey, performed at respondents’ home
- **Target population**: citizens of WBC aged 18+
- **Questionnaire size**: approx. 20 minutes
- **Sample size**: 3085 in total, around 500 per country
- **Sampling frame**: based on the data from Census, vital statistics and the migration data
- **Sample type**: national representative, 3-staged stratified sample
THEORETICAL BACKGROUND

The aim of the quantitative survey is not to test one specific theory, but to give more precise data about attitudes toward and consumption of targeted product in WBC.

It is difficult for 4 product categories (fruit, organic, traditional products and products with health claims) to find one model which fits for explanation for consumption of all products.

Different models are useful for different predictions:

- **Theory of Planned Behavior** (Ajzen & Fishbein, 1980) – strong in predicting rational consumer behavior preceded by cognitive processes, with high personal involvement
- **Different dual models**: MODE model (Fazio, 1990; Fazio & Towles-Schwen, 1999) & Purchase cube model (Baumgartner, 2002) & In the dual-process model of (Kahneman, 2003) strong in predicting automatic, spontaneous consumer behaviors with low involvement
- **Situational theories** that elaborates importance of situation and context (Meiselman, 2007; Bem, 1970)
- **ELM model**
Questionnaire structure

INDEPENDENT variables

Socio demographic variables

Health status

MEDIATOR variables

Value and motives
(FCQ: health, mood, convenience, sensory appeal, natural content, price, weight control, familiarity, revised ethical concern)

+ BELIEFS – suggested by LEI

Perceived control
revised Impulsive food consumption scale

DEPENDENT variables

FOR FOOD IN GENERAL

Attitudes

Intention of consumption

Frequency of consumption/

FOR EACH PRODUCT CATEGORY

-Knowledge

-Social norms

FOR EACH PRODUCT CATEGORY
Factors behind Food Choice Questionnaire

- Health
- Convenience
- Price Sensitivity
- Mood
- Sensory appeal
- Natural content
- Weight control
- Familiarity
- Ethical concern
High consumption of given products and factors from FCQ

- Ethical concern
- Organic food
- Products with health claims
- Weight control
- Natural
- Health
- Mood
- Sensory appeal
- Traditional dishes
- Price
- Convenience
- Fruit

Consumer quantitative survey
High consumption of 4 products and factors from FCQ

Estimated Marginal Means of MEASURE_1

Country
- Serbia
- Macedonia
- Montenegro
- BiH
- Croatia
- Slovenia

Estimated Marginal Means

factor1
CONSUMPTION OF FRUIT AND FACTORS FROM FCQ

- Natural
- Once a day
- Weight control
- Mood
- Familiarity
- Once a month
- Ethical concern
- Price
- Rarely or never
- Health
- Sensory appeal
- Convenience
- Once a week
CONSUMPTION OF ORGANIC AND FACTORS FROM FCQ

-0.6 -0.5 -0.4 -0.3 -0.2 -0.1 0 0.1 0.2 0.3 0.4 0.5 0.6

-0.6 -0.5 -0.4 -0.3 -0.2 -0.1 0 0.1 0.2 0.3 0.4 0.5 0.6

Ethical concern

Once a day

Familiarity

Price

Sensory appeal

Rarely or never

Health

Mood

Natural

Convenience

Once a week

Once a month

Weight control
CONSUMPTION OF PRODUCTS WITH HEALTH CLAIMS AND FACTORS FROM FCQ

- Ethical concern
- Familiarity
- Natural
- Sensory appeal
- Price
- Weight control
- Health
- Mood
- Convenience
- Rarely or never
- Once a day
- Once a week
- Once a month

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CONSUMPTION OF TRADITIONAL DISHES AND FACTORS FROM FCQ

Familiarity
Once a day
Health
Sensory appeal
Once a week
Price
Once a month
Rarely or never
Mood
Convenience
Natural
Weight control

Consumer quantitative survey

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Ipsos Strategic Marketing
4 PRODUCT CATEGORIES
CONSUMPTION OF 4 PRODUCTS

- Fruit
- Organic
- Traditional
- Health claims

% of respondents by frequency of consumption:
- Once a day: 64%
- Once a week: 39%
- Once a month: 25%
- Rarely or never: 2%

Consumer quantitative survey by Ipsos
By your opinion (four products) + -

1  2  3  4  5  6  7

Bad          Good

Pleasant

Unhealthy

Convenient for consumption

Tasteless

Expensive

Fruits
Organic food
Traditional dishes
Products with health claims

Consumer quantitative survey
FRUIT AND IMPULSIVE CONSUMPTION SCALE

-0.6 -0.5 -0.4 -0.3 -0.2 -0.1 0 0.1 0.2 0.3 0.4 0.5 0.6

I usually think carefully before I eat something.

Most of my meals are planned in advance.

I sometimes feel guilty after having eaten something.

I sometimes cannot suppress the feeling of wanting food products I see in shops.

If I see a new food product, I want to try it.

I only eat things that I really think that my organism needs them.

It is a struggle to leave nice food products I see in the shop.

If I eat something, I usually do that spontaneously.

Rarely or never

Once a month

Once a week

Once a day

If I eat something, I usually do that spontaneously.

If I see a new food product, I want to try it.

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If I eat something, I usually do that spontaneously.

Rarely or never

Once a month

Once a week

Once a day

If I eat something, I usually do that spontaneously.
ORGANIC AND IMPULSIVE CONSUMPTION SCALE

If I see a new food product, I want to try it.

I sometimes feel guilty after having eaten something.

If I eat something, I usually do that spontaneously.

If I see a new food product, I want to try it.

I sometimes cannot suppress the feeling of wanting food products I see in shops.

It is a struggle to leave nice food products I see in the shop.

Most of my meals are planned in advance.

I only eat things that I really think that my organism needs them.

I usually only eat things that I intend to eat.

I usually think carefully before I eat something.

Once a day

Once a week

Once a month

Rarely or never
TRADITIONAL AND IMPULSIVE CONSUMPTION SCALE

- I only eat things that I really think that my organism needs them.
- I usually only eat things that I intend to eat.
- I sometimes cannot suppress the feeling of wanting food products I see in shops.
- If I see a new food product, I want to try it.
- If I eat something, I usually do that spontaneously.
- I sometimes feel guilty after having eaten something.
- It is a struggle to leave nice food products I see in the shop.
- Most of my meals are planned in advance.
- I usually think carefully before I eat something.

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Consumer quantitative survey
HEALTH CLAIMS AND IMPULSIVE CONSUMPTION SCALE

Consumer quantitative survey

HEALTH CLAIMS AND IMPULSIVE CONSUMPTION SCALE

1. If I see a new food product, I want to try it.
2. I sometimes feel guilty after having eaten something.
3. I sometimes cannot suppress the feeling of wanting food products I see in shops.
4. It is a struggle to leave nice food products I see in the shop.
5. Most of my meals are planned in advance.
6. If I eat something, I usually do that spontaneously.
7. I usually only eat things that I intend to eat.
8. I usually think carefully before I eat something.
9. I only eat things that I really think that my organism needs them.
10. Rarely or never

-0.5 -0.4 -0.3 -0.2 -0.1 0 0.1 0.2 0.3 0.4 0.5

Once a day

Once a week

Once a month

Once a year
FRUIT

A portion of fruit is approximately 80-100 grams, for example an apple, two spoons of fruit salat or 1 glass freshly squeezed juice.
How often do you consume fruit? - Gender

- Once a day: 68% (Male), 59% (Female)
- Once a week: 34% (Male), 26% (Female)
- Once a month: 5% (Male), 4% (Female)
- Rarely or never: 2% (Male), 1% (Female)
How often do you consume fruit? - Age

- 18-34: 69%, 65%, 57%
- 35-54: 35%
- 55+: 29%, 26%

Age groups:
- 18-34
- 35-54
- 55+

Frequency:
- Once a day
- Once a week
- Once a month
- Rarely or never

Percentage distribution for each age group.
How often do you consume fruit? - Education

- Once a day: 72%
- Once a week: 64%
- Once a month: 60%
- Rarely or never: 33%
- Elementary or less: 25%
- Secondary: 30%
- Higher or University: 2%

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How often do you consume fruit? - Mediterranean/Continental

- **Mediterranean**:
  - Once a day: 64%
  - Once a week: 32%
  - Once a month: 7%
  - Rarely or never: 4%

- **Continental**:
  - Once a day: 60%
  - Once a week: 30%
  - Once a month: 2%
  - Rarely or never: 1%
How often do you consume fruit? – agricultural HH

- Once a day: 65% (Yes), 63% (No)
- Once a week: 30% (Yes), 30% (No)
- Once a month: 5% (Yes), 4% (No)
- Rarely or never: 2% (Yes), 1% (No)
ORGANIC

Organic food is produced without adding pesticides, fertilizers, genetically modified organism and any other chemicals. The examples are: organic bread, honey, organic fruit and vegetables. Organic food has to have organic label, certification from official relevant institution.
How often do you consume organic food? - Country

- Serbia: 44%
- Macedonia: 37%
- Montenegro: 33%
- BIH ( Bosnia and Herzegovina): 31%
- Croatia: 27%
- Slovenia: 24%

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How would you personally define the term “organic food”?

Organic food is produced...

- Without adding pesticides, fertilizers and any other chemicals
  - 44%

- On the family farms with the traditional techniques of production
  - 24%

- According to procedures and techniques that are defined by traditional methods
  - 11%

- Provides health to the people, contribute to the environment
  - 10%

- Without using the genetically modified organism
  - 10%

Refusal
  - 1%
Where do you most often buy the organic food?

Base: Total target population

- **On the green markets**: 27%
- **Directly from the farmers**: 19%
- **In the supermarkets/hypermarkets**: 18%
- **In the specialized shops for the organic food**: 7%
- **On the Internet**: 0%
- **Other**: 12%
- **I do not consume organic food at all**: 16%
- **Don't know**: 2%
- **Refusal**: 1%

- **Yes**: 20% (On the green markets: 4%, Directly from the farmers: 20%, In the supermarkets/hypermarkets: 20%
- **No**: 21% (On the green markets: 7%, Directly from the farmers: 18%, In the supermarkets/hypermarkets: 21%

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What is the main types of organic food you consume the most

Multiple answers; Base: Total target population

- Fresh fruits: 57%
- Fresh vegetables: 57%
- Milk and dairy products: 42%
- Honey: 33%
- Bread: 21%
- The other products made out of crops: 13%
- Soft drinks: 9%
- Children food: 3%
- Other: 1%
- I do not consume organic food at all: 16%
How often do you consume organic food? - Gender

- Once a day: Male 34%, Female 32%
- Once a week: Male 27%, Female 29%
- Once a month: Male 12%, Female 12%
- Rarely or never: Male 26%, Female 26%
How often do you consume organic food? - Age

- Once a day
- Once a week
- Once a month
- Rarely or never

18-34:
- Once a day: 37%
- Once a week: 34%
- Once a month: 27%
- Rarely or never: 28%

35-54:
- Once a day: 32%
- Once a week: 28%
- Once a month: 24%
- Rarely or never: 26%

55+:
- Once a day: 22%
- Once a week: 18%
- Once a month: 14%
- Rarely or never: 26%
How often do you consume organic food? - Education

- Once a day: Elementary or less (36%), Secondary (32%), Higher or University (31%)
- Once a week: Elementary or less (34%), Secondary (29%), Higher or University (31%)
- Once a month: Elementary or less (23%), Secondary (13%), Higher or University (12%)
- Rarely or never: Elementary or less (11%), Secondary (11%), Higher or University (22%)
How often do you consume organic food? - Mediterranean/Continental

Once a day: Mediterranean 33%, Continental 25%
Once a week: Mediterranean 38%, Continental 27%
Once a month: Mediterranean 12%, Continental 12%
Rarely or never: Mediterranean 27%, Continental 21%
How often do you consume organic food? – agricultural HH

- 44% Once a day
- 30% Once a week
- 24% Once a month
- 14% Rarely or never

Yes

No

28%

23%
TRADITIONAL PRODUCTS

Under traditional dishes we mean meals that are eaten throughout the year or at certain times of the year. It may also be connected with various celebrations and special occasions. Traditional meals are prepared and cooked according to old recipes that are transmitted from one generation to other, and they are prepared with care - in a way that belongs to national heritage. The meals are prepared from natural ingredients and are typical for specific places, regions or a country. These are dishes that are cooked or prepared either at home or in the home of family members and friends, or in a restaurant - like for example Sarma and cicvara/pita FOR BiH, Sarma and Grah FOR CROATIA, Sarma and Podvarak FOR MONTENEGRO, Sarma and Cevapcici FOR SERBIA, Ricet and Jota FOR SLOVENIA, Tavce gravce, sarma, punjena paprika FOR MACEDONIA. (In each country the questionnaire will contain only the examples specified for that country).
How often do you consume traditional dishes? - Country

- Serbia
- Macedonia
- Montenegro
- BiH
- Croatia
- Slovenia

- Once a day
- Once a week
- Once a month
- Rarely or never

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Here is a list of items. Please indicate which 4 items are most related to traditional dishes in your opinion.

Multiple answers; Base: Total target population

- Homemade: 70%
- Family: 50%
- Tasty: 50%
- Healthy: 45%
- Heritage: 37%
- Country: 29%
- Safe: 17%
- Trust: 15%
- Everyday: 12%
- Special occasions: 12%
- Local: 11%
- No additives: 11%
- On-farm production: 10%
- Unpolluted Environment: 8%
- Cheap: 8%
- Small scale of production: 3%
- Well-known brand: 2%
- Refusal: 1%
How often do you consume traditional dishes? - Gender

- Male
- Female

- 40% Once a day
- 40% Once a week
- 13% Once a month
- 6% Rarely or never

- 43% Once a day
- 39% Once a week
- 14% Once a month
- 6% Rarely or never
How often do you consume traditional dishes? - Age

- 18-34
- 35-54
- 55+

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<tr>
<th>Frequency</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
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<tr>
<td>Once a day</td>
<td>44%</td>
<td>41%</td>
<td>33%</td>
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<tr>
<td>Once a week</td>
<td>44%</td>
<td>42%</td>
<td>38%</td>
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<tr>
<td>Once a month</td>
<td>42%</td>
<td>43%</td>
<td>38%</td>
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<tr>
<td>Rarely or never</td>
<td>16%</td>
<td>5%</td>
<td>5%</td>
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How often do you consume traditional dishes? - Education

- Once a day: Elementary or less 46%, Secondary 42%, Higher or University 35%
- Once a week: Elementary or less 36%, Secondary 38%, Higher or University 35%
- Once a month: Elementary or less 46%, Secondary 42%, Higher or University 35%
- Rarely or never: Elementary or less 35%, Secondary 12%, Higher or University 7%
How often do you consume traditional dishes? - Mediterranean/ Continental

- Mediterranean:
  - Once a day: 40%
  - Once a week: 34%
  - Once a month: 19%
  - Rarely or never: 5%

- Continental:
  - Once a day: 42%
  - Once a week: 33%
  - Once a month: 13%
  - Rarely or never: 14%
How often do you consume traditional dishes? Agricultural HH

- Once a day: 48%
- Once a week: 42%
- Once a month: 16%
- Rarely or never: 7%

Yes
No
HEALTH CLAIMS

I will explain what we mean by products with health claims and I will give you some examples. Health claims that we see on product packages are claims that link a nutrient to a normal functioning of the body or a specific disease. An example of a health claim - High in calcium, Calcium helps build strong bones. Adequate calcium throughout life, as part of a well-balanced diet, may reduce the risk of osteoporosis. Please look at the picture of products with health claims.
How often do you consume products with health claims?

- Once a day
- Once a week
- Once a month
- Rarely or never

<table>
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<tr>
<th>Country</th>
<th>Once a day</th>
<th>Once a week</th>
<th>Once a month</th>
<th>Rarely or never</th>
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<tr>
<td>Serbia</td>
<td>32%</td>
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<td>Macedonia</td>
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<td>20%</td>
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<td>Montenegro</td>
<td>26%</td>
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<td>BiH</td>
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<td>Croatia</td>
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<td>Slovenia</td>
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<td>15%</td>
<td>13%</td>
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</tbody>
</table>

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How often do you consume products with health claims? - Gender

- Once a day: Male 36%, Female 32%
- Once a week: Male 22%, Female 27%
- Once a month: Male 19%, Female 19%
- Rarely or never: Male 23%, Female 22%

Consumer quantitative survey
How often do you consume products with health claims?- Age

- 38% Once a day
- 34% Once a week
- 30% Once a month
- 19% Rarely or never

18-34
35-54
55+

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How often do you consume products with health claims?

Education

Elementary or less: 32% Once a day, 26% Once a week, 21% Once a month, 0% Rarely or never

Secondary: 39% Once a day, 37% Once a week, 27% Once a month, 21% Rarely or never

Higher or University: 27% Once a day, 21% Once a week, 19% Once a month, 15% Rarely or never

Rarely or never: 32% Once a day, 18% Once a week, 14% Once a month, 0% Rarely or never
How often do you consume products with health claims? - Mediterranean/Continental

- Once a day: Mediterranean 26%, Continental 23%
- Once a week: Mediterranean 33%, Continental 19%
- Once a month: Mediterranean 17%, Continental 18%
- Rarely or never: Mediterranean 41%, Continental 22%
How often do you consume products with health claims? - agricultural HH

- Once a day: 27%
- Once a week: 30%
- Once a month: 20%
- Rarely or never: 19%

- Yes: 36%
- No: 28%
DoW – WP9 deliverable

- D9.1 Report with frequencies and basic socio-demographic cross – tabulation with key findings and indication of statistical significance Month 30 (June) - delivered
- D9.2 Summary presentation of main results Month 30 (June)
- D9.3 Datasets in SPSS or ASCII format. Month 30 (June) - delivered
Processing of the data - WP9 status

- Datasets in SPSS delivered – October 2010
- Report with frequencies and basic socio-demographic cross tabulation and indication of statistical significance delivered – October 2010
- Summary presentation with main results in PPT delivered
- Data available to all partners
Time table for future IPSOS activities on WP9

- Draft WP9 deliverable in Word - to be delivered in May
- Your comments on WP9 deliverable by the end of May
- Final deliverable in June (Month 30 according to DoW)
  - Theoretical background, and tables
  - Importance of different motives for dietary choices in West Balkan countries: comparison between countries in the region and with Western European countries – factor analysis of Food Choice Questionnaire (FCQ)
  - Food choice differences in respect to different socio-demographic factors. Regression analysis to be used in order to estimate the influence of different socio-demographic factors and attitudes for selected food consumption (health concerns, ethical concerns, impulsive food consumption behavior)
  - Analyzing factors in impulsive food consumption scale
Discussion on further use of WP9 data

- Any questions, comments, suggestions …..
- Your involvement in further WP9 analysis
  - In publishing
  - In presenting data on the next Open Seminar
  - In analyzing the data for the future projects
  - In presenting data on the scientific conferences