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Consumer evolutions : new expectations and requirements

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Abstract

Four major evolutions :

- Demographic background ; Change in drives and values ; Changes in consumption patterns ; Changes in food and drink patterns

Evolution of food habits in Europe :

- Snacking ; Convenience ; Out of home consumption ; Health and well-being ; Health and food

Conclusion : Quality new expectations.

Keywords

- Consumption patterns, food habits
- Europe

Four major evolutions

- The idea of quality : a very evolutive notion, linked to people's needs and motivations from basic needs (innocuity, satiety) to more elaborated needs
- Four main dimensions that have dramatic influence on food habits, on practices, and therefore on people's expectations : Demographic background, Drives and values, Consumption, Food and drink
 - **A quality product = a product that fits to my personal needs**

Demographic background

- - Stability of European population : no more mouths to feed, no need to produce more, but to produce better, decrease of caloric needs
- - Strong increase of people fifty years old and over : more active and more mobile individuals, specific needs (convenience, health), but reluctance to be considered and treated as «old»
- - Large discrepancies in household sizes, differences in packaging size, and globally in family needs (more mouths to feed with a similar budget)
- - Increase of feminine work, less time to prepare : convenience needs ; increase of men participation : reassurance and knowledge needs ; increase of children autonomy : need for non dangerous products that reassure the mother

Change in drives and values

- - Coping with uncertainty : increase of anxiousness and expectations : people learn to pilot their own needs, level of basic requirements increase, basic requirements satisfied in the food area : need to find other differentiation dimensions
- - Need to master one's destiny
- - New relations to time : hyper-present : to have fun, to have pleasure immediately, to manage time, to enjoy and savour time (products that unable me to do so...)
- - Need for meaning : prioritisation of needs, relativisation of food
- - Change of relations towards technology : decrease of technology fascination, growing consciousness of perverse effects, strong vigilance on technology (not allowed to do anything)
- - Environmental friendliness : sensitivity to waste, to garbage, social image of companies that do not respect individuals and nature

Changes in consumption patterns

- - A more mature and informed consumer : the end of consumption fascination, better knowledge of personal needs, price differences must be justified : brand and image not sufficient to guarantee product meaning and quality
- - Disloyalty and eclecticism : different needs according to circumstances among a single individual expanding offer generates occasionnality
- - Numerous competitions between unsuspected markets : food and leisure, food and health..., refusal of over stimulation
- - Word of mouth, indirect experimentation : more numerous food actors : need to give people words to talk about their experience

Changes in food and drink patterns

- - Decline of food in the household budget : stronger competition
- - Multiplication of products : unloyalty, difficulty to choose
- - Multiplication of storage and cooking systems : products must adapt to new preparation practices (microwave, freezer...)
- - Openness to new cultures : cosmopolitan influences
- - Balance between individual/convivial, structured/destructured food : conviviality, sharing/ personalisation, importance of dressings, to snack, to eat on the run, to mix things/ to make a recipe, to take time, to ritualise
- - Links between food and health : a global consciousness but very different behaviour patterns
- - Price sensitivity : people not ready to spend too much on food

- - Transmission and know-how deficits : lack of words to speak about food experiences, producers and distributors are responsible to transmit, to educate consumers



Evolution of food habits in europe

- Transnational evolutions : health, snacking, convenience, outside consumption, quality

Snacking

- - More frequent eating moments throughout the day : less important meals, need to compensate
- - Pleasure : not basic, untasty products, to combine convenience and pleasure
- - Outside of the home consumption : in the streets, in public transportation, to eat with the hands

Convenience

- - Products that integrate themselves in people's life system, purchasing, transportation, storage, consumption, destruction : each step can be an elimination reason
- - Great Britain : ready to eat
- - France, Germany : ready to serve
- - France, Spain, Italy : ready to prepare (kitchen assistance products, basic products to assemble)

Out of home consumption

- - Diversification of new moments-circumstances coupling, commercial and social restaurants, street consumption, transports consumption
- - Innovation comes from restaurants (diffusion of new products, new preparations, new tastes)
- - Leading countries : Great Britain, Germany

Health and well-being

- - From illness to discomfort and disease : no more a fatality, attention paid to well-being, sensitivity to environment aggressions
- - Organism perceived as a system : interactions between mental and physical, health as a capital to preserve every day
- - New health management : self-medication, mental optimisation, stronger autonomy from doctors, health as a consumer good
- - Strong differences between countries : Anglo-Saxon countries : from one crisis to the other, Latin countries : you must treat first : a positive view, not a sacrifice spirit

Health and food

- - Basic need : immediate innocuity : from canned foods (50s) to chilled-fresh foods (90s)
- - Germany, Great Britain : norms, controls
- - France, Italy, Spain : naturalness, freshness (to optimise nature's process)
- - A climate of doubt and interrogations about food processes : wish to control the whole process, need for better transparency, companies and brands responsible for the whole process, from production to purchase
- - Questioning about control and ethics of food actors : danger of loss of legitimacy of food manufacturers
- - Strong sensitivity to negative discourses : need to hear positive messages

Conclusion :

Quality new expectations :

- Mid-term and long-term effects
- Easy to use
- Pleasure, culture
- Equilibrium and immediate satiety
- Freshness, naturality and convenience
- Personnalisation and conviviality

References

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