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# **Segmenting Foodies in Germany: Actionable Insights for Agro-food Marketers**

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## Abstract

The rise of the *Foodie* movement around the globe has attracted some research attention in the sociology, but little research attention in marketing research. The present study is an important first attempt to empirically identify foodie features and examine their relevance in segmenting German consumers. Using two different cluster analysis techniques (hierarchical and a k-mean), 6 distinct foodie segments were identified: Foodies (12.0 %), Light Foodies (21.5%), Average Nutrition Enthusiast (21.7%), Traditionalist (17.1%), Uninvolved (18.2%), and the Uninterested (9.5%). Findings are useful for marketers to develop new and innovative products and to reformulate existing products for specific segments of foodies.

**Keywords:** Foodies, Exploratory factor analysis, Consumer segmentation, Germany

## 1 Introduction

Over the last decade, consumers' attitude towards food has changed dramatically and consumers' health consciousness is becoming an increasingly important factor driving the agro-food market. Also, consumers are increasingly aware of and concerned with the nutritional value, safety, and production attributes of their food (Caswell, 1998). But it is not only about sustainable and healthy eating. Nowadays, people are remarkably interested in food and cooking more than they have ever been. In addition, with the rapid aging population, busy lifestyles, and more women in the workforce, the demand for the convenience foods has increased in the last few years. Not surprisingly, these foods are often high in fat, salt, and sugar and have led to an increase in nutritional relation problems such as secondary mal nutrition, diabetes, and obesity. As a countermovement, a new health consciousness has started to emerge among consumers.

Food is central to everyday life. Nevertheless, food is not only a basic need, its connotations extend far beyond sustenance. Food is a social and cultural good, playing a profoundly important role in society as a core in social gatherings and creativity (Riches, 1999). In this context, terms like "*Foodie*" have emerged as a counterpoint to the confined world of high cultured food snobs (Johnston and Baumann, 2010). Foodies are individuals who are passionate about the pursuit of good food, with a long standing passion for eating and great desires in the exploration of food (Johnston and Baumann, 2010). Furthermore, foodies generally love to share their dining experiences and cooking techniques via social media and food blogs. Additionally, there is a large number of food blogs and magazines about food and cooking and creating a medium to engage in a Foodie culture online. Also, foodies love to share photos via social media platforms and this concept has been extremely important amongst foodie culture (e.g. Facebook, Twitter, Instagram, and Pinterest).

Moreover, foodies experiment with their culinary skills, imitate their past dining experiences, and at the same time take extra effort to ensure that the dishes prepared are enriched with nutrients to take care of the family's well-being (Johnston and Baumann, 2010). In the view of unique characteristics of foodies, their expectation and behavior can be expected to change from others due to adaptation of different food choice motives and varying behaviors in their food purchase and consumption behavior. Therefore, the foodie trend is an important postmodern consumer culture and deserves to be further understood in its various aspects.

The German food and beverage industry is the fourth largest industry sector in Germany. According to the German Food Association BVE (2014/15), the food sector alone generated revenues that

totaled to EUR 175.2 billion in 2013 four percent more compared to 2012. Domestically, there is a fierce competition in the German food sector due to the market power of the large retailers and discounters have strongly developed their market share over the last few years. Unlike past price-oriented approach, now most food markets in Germany are moving towards a more quality-oriented approach because customers have become more knowledgeable and require more variety and better product differentiation. On one hand, consumers are becoming more sophisticated in their tastes, are willing to pay more for specialty products, and have a strong desire to try new things. On the other hand, Germany's food industry is mainly driven by actively respond to changing consumer wants and needs. Hence, now more than ever before, marketing success depends on how food industry acknowledges and responds to the 'new food consumer voice'.

Despite a great media attention, so far, little marketing and consumer research has been devoted to the area of "Foodie culture". Although, even there are many research studies reported on foodies, most of them have employed a qualitative research approach. Accordingly, in order to fill the gap in the current literature, this study employ to investigate the key features of foodies in Germany and further examine their relevance in segmenting consumers. The main objective of this research was to develop a new version of the foodie instrument based on past literature. In addition, this study explores the foodie segments and their characteristics in Germany. Research results are expected to improve our rigorous understanding of foodie behavior in Germany and serve as reference for food companies to develop marketing strategies for different foodies segments.

## **2 Methodology**

### *Data Collection*

The questionnaire consisted of two parts. The demographic questions were in the first part. The second part was intended to identify the segments of foodies. The food related lifestyle instrument introduced by Brunsø et al extensively applied by extant literature to measure attitudes to food and behavior related to purchase, preparation and consumption of food products. This 69-item questionnaire measures 23 lifestyle dimensions, which cover the most important aspects with regard to dietary habits: *ways of shopping, cooking methods, quality aspects, consumption situations, and purchasing motives*. All items are rated on a five-point Likert-type scale, ranging from 'totally disagree' to 'totally agree'. The instrument has so far been employed in several international studies especially as a means of consumer segmentation (Brunso et al. 1996, Brunsø et al. 2004, Grunert et al. 2001, Grunert 1993, Hoek et al. 2004, Cullen & Kingston 2009, Wycherley et al. 2008, O'Sullivan et al. 2005, Scholderer et al. 2004, Buckley et al. 2005). Throughout these studies the food related lifestyle instrument has been cross-nationally tested to an extensive degree, i.e. for its ability to obtain results that can be compared even though respondents come from different countries, cultures and language regions. Thus far, this method is applied Western Europe (Scholderer, Brunsø, Bredahl, & Grunert, 2004), Australia and also to some Asian economies: for example Japan and Singapore (Reid, Li, Bruwer & Grunert, 2001).

Nevertheless, food related lifestyle scale should be adjusted to fit in to German food culture. Thus, the 41 foodie items were selected based on the literature review and a pre-test with sample groups. Eleven items were chosen directly from the reduced food related lifestyle scale items of Brunsø et al and Grunert (1995). Additionally, new items were included regarding eating and nutrition behaviour. Most statements were measured on a 5-point Likert scale, with answer ranging from "strongly disagree" (1) to "strongly agree" (5). In addition, respondents were also asked a number

of questions relating to their behaviour with respect to grocery shopping, and meal preparation activities. They were asked to indicate *who is responsible for grocery shopping, what are the major buying centers, how you rate your cooking ability, and how did you learn to cook.*

The quantitative data were collected between September and October 2015 by means of two online surveys. The survey was conducted by Toluna, Frankfurt a.M. , an independent market research company in Germany. In order to ensure a nationally representative sample, respondents were recruited through quota sampling, using quotas for gender, age, and education based on the German Census Bureau data. This study mainly focused on the growing consumer interest in nutrition, specifically foodies, therefore, participants, who initially stated that nutrition was unimportant or very unimportant to them were excluded from the study. A total of 500 responses were collected and ultimately led to a total of 451 usable responses. Questionnaire with missing data were discarded.

### *Data Analysis*

Statistical data analyses were carried out with the software program SPSS 24.0 (SPSS Inc., Chicago, IL, USA) for descriptive statistics, exploratory factor analysis, reliability analysis, cluster analysis, and ANOVA. Socio-demographics are presented as proportions, while “Foodie values” are presented as means (standard deviation). A principal component factor analysis with varimax rotation was conducted to test the validity of statements regarding food-related lifestyle. A reliability analysis, using Cronbach’s alpha was used to assess the reliability and internal consistency of each of the factors. Cronbach coefficients ranged from 0.74 to 0.93. The reliability coefficient were acceptable ( $>0.5$ ) which is the minimum value that is considered acceptable as an indication of reliability (Hair et al., 1998). The factors, statements, and reliability coefficients are presented in Table 2. A cluster analysis was subsequently conducted using seven identified foodie factors to segment consumers. A cluster analysis is established as “a useful technique for describing lifestyle as relatively homogeneous patterns of market-related behavior” (Granzin et al., 1998). Therefore, in order to identify the optimal number of foodie clusters, a hierarchical clustering algorithm based on Ward’s method was used, which maximizes the sum of the squared distances among clusters (Hair et al., 1992). The 6-cluster solution was identified to be the most appropriate to understand the food-related lifestyles of German customers. Finally, mean scores on the derived factors compared between the consumer groups by One-Way ANOVA (two-tailed) with Scheffe’s post hoc tests. A  $p$ -value of 0.05 was used as the threshold for statistical significance. The mean value of each cluster was calculated and in the following, this mean named “Foodie index”.

## **3 Results**

### *Socio-demographic characteristics of the sample*

More than half of the respondents in the sample were women. Mean ages of the respondents were 50.8 years and 46.0 years for total and foodies, respectively. More than 50.0% of the respondents in the total sample were married. Nearly, 35.2% of the foodies had a high level of formal education, i.e. a technical college or university degree. Nevertheless, in total, 36.1% have obtained primary education and around 2.2% had no education at all. More so, on income of the respondents, findings

revealed that a good majority of foodies had a monthly income ranged from €1,001 to €2,500 representing 51.8 % of the respondents. This income group can be regarded as middle class in the society. Lastly, on the family size, 42.4% of the total sample and 33.3% of the foodies have an average of two persons (Table 1).

Table 1. Socio-demographic characteristics of the study population

Description	Total (N=451)		Foodies (N=54)	
	N	%	N	%
<b><i>Gender of response</i></b>				
Male	207	45.9	24	44.4
Female	244	54.1	31	56.6
<b><i>Marital status</i></b>				
Single	120	26.6	12	22.2
Engaged	9	2.00	4	7.4
Married	229	50.8	29	53.7
Divorced	70	15.5	7	13.0
Widowed	23	5.1	2	3.7
<b><i>Age mean (in years)</i></b>	50.8		46.0	
<b><i>Educational back ground</i></b>				
No school	10	2.2	0	0.0
Primary school	163	36.1	16	29.6
High school	129	28.6	18	33.3
University/technical collage	145	32.2	19	35.2
Others	4	0.9	1	1.9
<b><i>Monthly household income</i></b>				
Less than € 1000	65	14.5	5	9.3
€1,001 - €2,500	229	51.2	28	51.8
€2501 - €4,000	115	25.7	13	24.1
Above € 4,001	39	8.7	8	14.8
<b><i>Household size</i></b>				
1	128	28.4	13	24.1
2	191	42.4	18	33.3
3	67	14.9	6	11.1
>4	63	14.0	17	31.5

### *Modified foodie instruments*

The factors, statements, and reliability coefficients are presented in Table 2. According to the results of factor analysis, the foodie instrument can be divided into seven factors. The seven foodie factors were *eating in company*, *self-fulfilment in food*, *novelty preferences*, *attending culinary events*, *quality aspects*, *cooking methods*, and *subjective knowledge and cooking skills*. As a result of a reliability test, the coefficients of Cronbach's alpha of these seven foodie factors were 0.77, 0.84, 0.74, 0.86, 0.88, 0.93, and 0.86, respectively, surpassing the criteria for reliability acceptability.

Table 2. Factor dimensions included in the modified foodie instruments and Cronbach's  $\alpha$

Factors	Statements	Mean/SD	Cronbach's $\alpha$
<b><i>I. Eating in company</i></b>	We often get together with friends to enjoy an easy-to-cook casual dinner	2.99/1.2	0.786
	Dinning with friends is an important part of my social life	3.29/1.2	
	When I serve a dinner to friends, the most important thing is that we are together	3.61/1.0	
	Going out for dinner is a regular part of our eating habits	2.26/1.2	
	The food taste is much better when I eat in good company	3.88/1.0	
<b><i>II. Pleasure and interest</i></b>	I am very interested in food	3.99/0.9	0.844
	Before I go out eating, I am looking for information and reviews about the restaurant	3.11/1.2	
	I am a real foodie at dinner	3.55/1.0	
	For me , eating is a matter that incorporates all senses of feeling, smell, taste, and sight	4.11/0.9	
	When I eat, I enjoy food very much	4.02/0.9	
	Good drinks and food play a major role in my life	3.86/1.0	
<b><i>III. Novelty preferences</i></b>	I buy and like to eat exotic foods	2.97/1.1	0.744
	I love to try recipes from foreign countries	3.37/1.1	
	I only buy and eat foods that are familiar to me	2.83/1.1	
	Recipes and articles from magazines from other cooking traditions make me experiment in the kitchen	3.17/1.2	
	I look for various ways to prepare unusual meals	2.97/1.1	
	I like to try new foods that I have never tasted before	3.33/1.1	
<b><i>IV. Attending culinary events</i></b>	I like to visit food fairs	2.21/1.2	0.856
	I would like to attend food tastings	2.87/1.2	
	I love to visit (Street) Food Festivals	2.27/1.2	
	I like to visit the cooking classes	2.05/1.2	
	I like to read food blogs on the Internet	2.37/1.3	
	I like to buy food products in speciality stores, where I can get expert advice	2.97/1.1	
<b><i>V. Quality aspects</i></b>	For me, the naturalness of the food is an important factor	3.89/1.0	0.877
	I prefer fresh products over canned products	4.17/0.9	
	I would like to pay more money for animal welfare approved meat and eggs	3.76/1.1	
	I prefer to buy food from my region	3.63/1.0	
	I like to buy foods that have been hand-crafted production	3.56/1.0	
	I prefer to buy foods that were traditionally made	3.59/1.0	
	I prefer food with a trustworthy character (for example, organic, Fairtrade, animal welfare) to foods without a label	3.23/1.1	
<b><i>VI. Passion for cooking</i></b>	Cooking is my hobby	3.26/1.3	0.933
	Cooking brings me joy	3.83/1.2	
	Cooking is a process of self-realization	3.21/1.2	
	I have a passion for cooking	3.52/1.3	

	I like to try new recipes	3.71/1.1	
	I invest a lot of time for cooking	3.13/1.1	
	I am proud to prepare my own meals and self-invested recipes	3.32/1.2	
<b>VII.</b>	I do not need recipes because I know by experience what combination	3.34/1.1	0.856
<b>Subjective</b>	of Ingredients result in a delicious dish		
<b>knowledge</b>	I am flexible and can make a meal out of all possible ingredients that I	3.69/1.1	
<b>and cooking</b>	have at home		
<b>skills</b>	I like to prepare dishes without a prescription and let my creativity	3.30/1.1	
	I have an extensive knowledge of food and its preparation methods	3.34/1.1	

Foodies segments are identified and labeled according to the segments' primary characteristics. Six segments with foodie characteristics were identified, namely: the “*Foodies*” (12.0%), the “*Light foodies*” (9.5%), the “*Average nutrition enthusiast*” (21.7%), the “*Traditionalist*” (17.1%), the *Uninvolved* (18.2%), and the “*Uninterested*” (9.5%). Table 3 presents a categorization of the foodie segments, based on a comparison of their mean scores.

Table 3. Mean scores of respondents among foodie segments

Factors	Panel						
	Clusters						
	Total (N=451)	Uninterested (N=43)	Uninvolved (N=82)	Traditionalist (N=77)	Average Nutrition Enthusiast (N=98)	Light Foodies (N=97)	Foodies (N=54)
<i>I. Eating in company</i>	3.11	1.78 <sup>a</sup>	2.82 <sup>b</sup>	2.64 <sup>b,c</sup>	3.30 <sup>d</sup>	3.58 <sup>e</sup>	4.11 <sup>f</sup>
<i>II. Pleasure and interest</i>	3.67	2.53 <sup>a</sup>	3.27 <sup>b</sup>	3.64 <sup>c</sup>	3.52 <sup>c,d</sup>	4.20 <sup>e</sup>	4.50 <sup>f</sup>
<i>III. Novelty preferences</i>	3.06	2.00 <sup>a</sup>	2.42 <sup>b</sup>	2.85 <sup>c</sup>	3.22 <sup>d</sup>	3.47 <sup>e</sup>	4.11 <sup>f</sup>
<i>IV. Attending culinary events</i>	2.30	1.40 <sup>a</sup>	1.79 <sup>b</sup>	1.65 <sup>a,b,c</sup>	2.71 <sup>d</sup>	2.41 <sup>e</sup>	3.79 <sup>f</sup>
<i>V. Quality aspects</i>	3.55	2.55 <sup>a</sup>	3.24 <sup>b,c,d</sup>	3.29 <sup>b,c,d</sup>	3.49 <sup>b,d</sup>	4.10 <sup>c,d,e,f</sup>	4.34 <sup>e,f</sup>
<i>VI. Passion for cooking</i>	3.32	1.84 <sup>a</sup>	2.24 <sup>b</sup>	3.64 <sup>c</sup>	3.26 <sup>d</sup>	4.09 <sup>e</sup>	4.44 <sup>f</sup>
<i>VII. Subjective knowledge and cooking skills</i>	3.34	2.22 <sup>a</sup>	2.63 <sup>b</sup>	3.60 <sup>c</sup>	3.09 <sup>d</sup>	4.01 <sup>e</sup>	4.21 <sup>e,f</sup>
<b>Foodie index</b>	<b>3.19</b>	<b>2.05</b>	<b>2.63</b>	<b>3.04</b>	<b>3.23</b>	<b>3.69</b>	<b>4.21</b>

Note: Statements are measured on five-point scales (1=strongly disagree; 5=strongly agree). If different superscripts then indicate significantly different means following Scheffe's post doc testing. Difference between foodies and blog foodies among all dimensions are statistically significant.

The “*Foodies*” segment was distinguished by the highest mean scores on pleasure and interest (mean=4.50,  $p<.001$ ), cooking method (mean=4.44,  $p<.001$ ), and quality (mean=4.34,  $p<.001$ ) factors. Consumers in this segment genuinely enjoy food and take the most pleasure in all good foods and drinks. In terms of cooking method, compared to other segments, *foodies* are most keen on cooking and trying diversified creative recipes, new techniques, and new ingredients. Moreover, they placed the largest importance of food quality aspects and mainly freshness of foods (e.g. fresh more preferred than canned products), naturalness of foods, and non-GMO food products. They



have a strong preference for buying food products specially labelled as “Organic” or “Fairtrade” and are willing to pay more for products from farms that were audited to higher welfare standards. In comparison to other segments, this one seemed to be most concerned with taste, nutrition, and food safety and usually, they research before eat at a restaurant. In general, these consumers like to buy foods in super-markets, discount stores, and specialty shops with the assistance of a sales person.

The “*light foodies*” segment shows similar trends as the “*foodies*” segment. Nevertheless, they had lower mean scores on the eating in company, novelty preferences, and attending culinary events ( $p<.001$ ). They were less interested in eating out with friends and less like to taste various exotic cuisines. The “*Average Nutrition Enthusiast*” segment is constituted by consumers who again placed importance of pleasure and interest, cooking method and Quality aspects. But, contrary to “*light foodies*”, they also placed significant (mean=2.71,  $p<.001$ ) emphasis on foodie events and festivals like food shows, food fairs, wine festival and tasting, and food trade shows. The “*Traditionalist*” is generally traditional in their beliefs toward food and they seldom dine out with friends. Even though, this group enjoy cooking, they are less likely to seek new food experiences and try unfamiliar foods. They also placed importance on food quality aspects such as food’s freshness, price/quality relation, food’s healthiness and, food labels. In fact, their price consciousness is the highest of all segments. This consumer shows greater appreciation than all other segments for the products and service offered at discount super markets like Aldi, Plus, Penny, Net, and Lidl. In addition, they eat with all their senses and immensely enjoy the food.

And finally, on the whole, the “*Uninterested*” segment is least interested in food or anything related foodie activities and mean scores are significantly different from others ( $p<.001$ ). Compared to other segments, these individuals placed highest score on price consciousness and very sensitive to price fluctuations. More specifically, this “*Uninterested*” segment form the largest group among the other segments and 50 respondents who state that they have no interest in food and food-related activities were screened out before they began the survey. They care much less about freshness, naturalness, safety, and food labels, than other consumers. Like the “*Traditionalist*”, this group also placed high importance on discount supermarkets. Not surprisingly, food and food products are least important in their life and they did not consider dining with friends or family as an important social activity.

## 4 Discussion and conclusion

To the knowledge of the authors, this is the first attempt to get insight to empirically identify foodie features and examine their relevance in segmenting German consumers. A new version of foodie instrument developed to fit German culture demonstrated statistical robustness in terms of reliability and construct validity. An eleven items were taken out of the reduced food related lifestyle questionnaire and incorporated with new items.

In this study, six distinct foodie segments were identified, which include: (1) “*foodies*” (12.0%); (2) “*light foodies*” (9.5%); (3) “*average nutrition enthusiast*” (21.7%); (4) “*Traditionalist*” (17.1%); “*Uninvolved*” (18.2%), and (6) “*uninterested*” (9.5%). The “*Foodies*” and “*Uninterested*” segments are of two extreme lifestyles. “*Foodies*” pay close attention to each foodie dimension and, are passionate about their cooking much stronger than any other segments. Additionally, the survey showed that foodies are willing to devote a considerable amount of time to healthy and creative meal preparation, and also consider cooking as an effective tool for self-realization of the

person. *On the contrary*, “*Uninterested*” group pay so little attention to each foodie dimension and, they are far less interested in attending culinary offerings, dinning out with friends or family members, and cooking. Thus, we can assume that this group of segment was comfortable purchasing take-away or ready-to-eat foods. This group of consumers should be regarded as the ideal target for companies to use when developing successful marketing strategies and planning for market campaigns.

For instance, “*Light foodies*” also behave in the same way as foodies. Nonetheless, their mean foodie value is less compared to foodies, and some significant difference regarding the participation in culinary events, novelty preference, and social gathering were found. Therefore, the extended foodie segment accounted for about 20% of the German population. Hence, suppliers and retailers of gourmet and epicurean foods would target these groups.

The largest segment of ““*average nutrition enthusiast*” consumers expressed a clear quest for cooking method and Quality aspects. The “*Traditionalist*” consumers have least tendency to eat out as an opportunity to try new and exotic foods. They are care most about food quality aspects such as food’s freshness and naturalness, at the same time they are very price conscious. This is different from the result saying that traditional consumers are not sensitive to price fluctuations (Fang and Lee, 2009). According to Wycherley et al. (2008), traditionalist consumers indicate greater appreciation for the products and service offered at retail outlets such as farmer markets and specialty shops. Contrary to these findings, our results showed that the “*Traditionalist*” most likely placed high importance on discount supermarkets.

This study confirmed that a new foodie lifestyle scale for the segmentation of foodies is a useful approach to identify, characterize, and develop marketing strategies for reaching foodie segments. This study demonstrated that foodies should be regarded as a heterogeneous group with diverse characteristics and wants. Therefore, when approaching the foodies market, these segments have to be taken into account. Further, since the behavioral traits and life styles of foodies are expected to change over time, future research is needed to investigate changing trends. This study could also be expanded to foodies on other social media such as websites, face book groups, You tube, etc.

Even though this is the first study investigating the foodie features and segmenting foodies, this study has some limitations. First, the size of the sample is not quite large for market segmentation of foodies. Thus, it will be interesting for future researchers to explore whether similar results hold among the foodies across various EU countries. This could provide much accurate and more relevant consumer information for companies involved in the food sector. In addition, future researchers should investigate demographic profiles of the foodies segments, thus the results can serve as a reference for food companies when developing and planning market campaigns. In terms of contribution to the academic literature, this study presents a useful extension to the segmentation literature available, specifically relation to foodie segmentation.

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