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8 Changing consumer demand

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The title of this paper is deliberately ambiguous. It implies an analysis both of the ways in which consumer demand for food is changing and the ways by which this demand may be influenced. It needs, of course, to be placed in the context of an agricultural industry that wishes both to lead the consumer and to provide what they desire.

However, if it is easy to analyse the issues to be examined by this paper, it is considerably more difficult to deal adequately with them. We are not yet very good at identifying the way in which demand is formulated within the food field, and certainly very poor at predicting how changes will emerge in a free world economy.

Thus, I set out to identify the criteria that lead to stability in food habits; the factors that have influenced change historically; and the issues which may encourage change in the future.

Such a theoretical analysis will at least identify, more precisely, both the problems involved and the issues to be considered. Also, it may aid others to move from a general understanding to a specific interpretation, in the light of their own particular subject area.

REGIONAL AND NATIONAL VARIATIONS IN FOOD HABITS

Consumer tastes often vary considerably within relatively small distances within a country. Thus, for example, different French vineyards will each have their set of devotees; each Swiss canton will expound the advantages of different cheeses; even within the nationally organised brewing industry in

Britain, there will still be individual variances and taste preferences between one town and the next.

In such a context, it is not perhaps surprising to find significant variations in consumption of basic foods between different countries within the EC (Table 1).

Table 1
Specified foods moving into consumption in EC countries, 1975
(kg/head per year)

	Denmark	France	West Germany	Ireland	Italy	Netherlands	Belgium	UK
Meat	70	99	90	100	65	73	90	74
Potatoes	67	91	90	117	37	77	105	90
Fruit	53	74	110	41	101	111	75	47
Vegetables	47	112	69	82	156	80	98	61
Cereals	61	73	64	87	126	63	73	73

Source: OECD (various).

These variants reflect patterns built up over significant periods of time and are based primarily upon economic and geographical criteria. A climate and a soil which produce an abundance of fruit in one territory (with a possibly resultant low price) will be matched elsewhere by a terrain only suitable for the pasturing of cattle or grazing of sheep.

To this will have been added significant economic criteria – of the ability of individual countries and individuals to afford the cost of highly desirable imported foods.

FOOD HABITS ARE STABLE

It is in such a context that individuals have come to select the most palatable (and hopefully nutritionally desirable) diet from the foods available to them.

Perhaps surprisingly, even as western society has become increasingly prosperous and food preservation techniques have widened food availability, many of these original food patterns have remained, even though the basic determinant has been modified or even disappeared. Thus, the significance of potatoes in the Irish diet and the heavy pasta diet in Italy reflect original poverty situations which no longer exist.

Hence it is apparent that tradition and habit play a very significant part in determining our food patterns, both regarding what we eat now and our aspirations for the future.

In fact these established traditional food patterns have enormous strengths because foods manifest themselves in all sorts of sociological and psychological ways over and above physiological needs. All people regard themselves as experts on food — after all they have been eating virtually every day since birth! It is also the first manifestation of communication — the new born infant shouts to get food and shouts when he has a stomach-ache resulting from eating too much.

Equally, we use foods to demonstrate our association with a community and the significance of our role within it. Immigrants entering a territory usually change their dress first — because the weather demands it; their language second — because communication becomes essential; but their food habits last of all — because they retain long-term devotion to traditional foods which are part of their heritage and which symbolise all of the best and none of the worst of their past.

Again we use food as a demonstration of our personality. There are five essential criteria of a sociological/psychological nature influencing food choice, which can be summarised as follows:

- (i) *Food acts as an aid to security.* Thus, when everything seems to be going wrong we comfort ourselves that things are 'alright really' by turning to established favourite dishes. Similarly, old people tend to store food — clear demonstration of their fears, of a practical, physical and emotional nature, for the future.
- (ii) *Food acts as a means of demonstrating mood and personality.* Words and phrases such as 'champagne'; 'a quiet cup of tea', 'a strong whisky' conjure up imagery of significance, and we use them to demonstrate our mood and feelings to others.
- (iii) *Food acts as a compensation for denial.* At both the extremes of food intake there is frequently a psychological reason, reflecting an unhappy marriage, death, boredom, frustration, inability to cope, etc. Cure this situation and food consumption stabilises.
- (iv) *Food choice is used as a means of demonstrating group acceptance, conformity and prestige.* Instant versus ground coffee, dry versus sweet sherry, how we eat our peas, whether we use a fork for our dessert — such choice and behaviour says things about us and our willingness to conform with the conventions of the group we represent.
- (v) *Food selection and preparation acts as a substitute for material creativity.* As woman has moved away from many of the traditional, child-bearing functions on a continuous basis, she has sought to show, by

budgeting, shopping and cooking well, how she is continuing to care for and justify the praise of her family.

Lastly, it must be recognised that if change involves anything more than a switch of two identical brands of a particular type of food, then it sets off a series of complex interrelated movements. In essence, all foods are competitive with each other. At a physiological level, once in terms of bulk we have enough to eat, increased consumption of one food tends to lead to the reduction in consumption of another.

We also must recognise that change is identifiable at different levels. It may be: change between one brand of a product and another (Findus peas for Birds Eye peas – not normally of significance to the nutritionist or food legislator); change between closely associated food categories (apples for oranges, peas for haricots verts – again not usually of major significance); changes between broad categories of food as mentioned above (meat for bread, and apples for beer – fundamentally significant changes).

Similar interrelationships exist both in economic and socio-psychological terms. Most people have a relatively fixed amount of money which they are prepared to spend on food, at least in the short run. A change in the amount spent on one set of food products automatically leads to a change in the amount of money available for other food products. Similarly, a change in one food may change the whole meal pattern because only certain foods are regarded as acceptable in combination with others.

FOOD HABITS ARE CHANGING

However, none of this is to suggest that food habits rarely change. Rather it is to make the basic point that there is a good deal in favour of the *status quo*. Nevertheless, as is shown in Tables 2 and 3, food patterns have changed markedly in each of the countries of the EC over the last ten years

Table 2
Foods moving into consumption in the UK, 1965 and 1978
(per head per year)

	1965	1978
Cheese (kg)	4.6	5.6
Fish (kg)	7.8	6.0
Eggs (No)	250	197
Tea (kg)	4.1	3.0
Coffee (kg)	1.3	2.3

Source: OECD (various).

and we need to assess what have been the major factors encouraging these changes.

Perhaps the most important factor has been the economic issue; that is the improved capacity to buy the foods the individual consumer wants, as a result either of the increasing wealth of the population as a whole, or a redistribution in favour of the poorer sections, or lower prices for a particular food (perhaps based upon subsidy; market glut; national/international policy; increased yields based on scientific/technological advance). Also, importantly, food can be preserved in order to be distributed to markets thousands of miles away and made available six months or a year after harvest.

Secondly, society is still dynamic. In the UK each year:

650 000 births take place (half being first-borns),

600 000 teenagers leave school,

4 000 000 people change their jobs,

1 500 000 people move house.

Surely these provide examples of key moments of encouraging change.

Thirdly, trends in food imagery are important. For a whole range of reasons consumers may become increasingly attracted to a particular food item. It is an 'in-food'; it demonstrates status or wealth; it 'does you good'; it tasted fine on holiday'.

It will be noticeable that I have not included perhaps the two most frequently referenced factors regarded as influencing choice – namely nutrition education, and advertising. This is because my primary thesis is that, if food consumption patterns change, they usually change because the consumer wants them! This is very different from persuasion to change because we, as nutritionists, Government agricultural economists or

Table 3
Percentage change on foods moving into consumption in EC countries,
1960–1965 to 1975

	Denmark	France	West Germany	Ireland	Italy	Netherlands	Belgium	UK
Meat	+15	+24	+29	+51	+80	+46	+36	+3
Potatoes	-38	-18	-29	-16	-20	-21	-20	-10
Fruit	—	+16	+7	+17	+18	+63	+29	—
Vegetables	+9	-19	+27	+24	+16	+13	+15	—
Cereals	-22	-24	-18	-19	-5	-19	-16	-10

Source: OECD (various).

legislators, want them to change. Indeed, the only evidence of major external influence on behaviour patterns at this national level (which mostly occur during war periods) have been those determined by scarcity, rationing or punitive use of price. On an everyday basis, change is because the consumers believe that a new choice will more appropriately satisfy their taste, their pocket and their social and psychological needs rather than because we tell them.

Thus, I would argue that advertising has not been a very significant influence upon choice at the broadest level. It certainly may be of profound influence in brand choice, or even possibly closely aligned categories of foods, but there is not much evidence to suggest that broad categories of foods are significantly and directly influenced by advertising. This is not of course to suggest that, over a long period of time and with the combination of a range of brands pushing together with heavy advertising, some changes may not occur.

Equally, there is little evidence that nutritional knowledge has to any great degree influenced consumer behaviour. So often, any change based on this knowledge would appear to conflict with other important roles played by food in life (as identified earlier), and in consequence this information is rejected in favour of satisfying another more significant need. The analogy with cigarette smoking makes the point very strongly. Knowledge does not necessarily modify behaviour.

In addition, unfortunately, nutritionists do not even have precise views on what to recommend. The desirability, or otherwise, of animal fat in the diet is a prime example of present uncertainty.

I have, so far, made no real comment upon the role of food technology. Yet, undoubtedly, this is a force in changing food habits. At an extreme level, the introduction of truly new foods can revolutionise the market. Thus, it would be difficult to imagine the switch away from cooked breakfasts had there not been appropriate development of breakfast cereal. Equally, the development of appropriate technology for making crisps and other snacks has had a significant influence upon our food habits. More recently, the development of TVP-based products such as *Soya Mince* and *Soya Choice* mark another fundamental development.

However, the number of changes in any decade, of such real consequence, are extremely limited. Most new products are simply a modification of the form/preserving method/packaging of a standard item, rather than anything more fundamental. Thus, most changes, certainly within food categories, have been much more dependent upon production methods reducing price (eg, broiler chickens), improving taste (coffee essence to AFD coffee) and improving product consistency (dried, through canned, to frozen vegetables).

Indeed, the great majority of technical developments and changes involve even less than this. Usually they are associated with very small product variations or modifications based, for example, on 'added vitamins', 'more fruit', 'more regular sized vegetables', etc. Together these aspects all have an impact but obviously within very narrow fields.

FUTURE TRENDS

In looking to the future, therefore, and its impact upon dietary behaviour, we need to consider several criteria. Firstly, I would suggest that, without other fundamental constraints occurring, current food trends are likely to continue. Fundamental modifications are only likely to occur if any of the following take place:

- (i) Significant economic depression or redistribution of wealth.
- (ii) Significant food subsidy/tax.
- (iii) Major food product scarcity.
- (iv) Rationing.
- (v) Significant demographic or family structure changes.
- (vi) Other related general themes.

At a second level we can expect social influences to occur as a result of other key changes in the 1980s. I believe these will include:

- (i) We are going to become, absolutely, a society of workers, ie, almost all adults will work for at least part of the week. This will influence us towards casual/convenience meals.
- (ii) Equally, we are still an ageing society. This will move in a contradictory fashion towards the preservation of conservative patterns of behaviour as they currently exist.
- (iii) We are going to be a society with more leisure – either by desire or enforced as a result of unemployment.
- (iv) There is some evidence of a throw-back to a more rigid, moral society.
- (v) The growth of the conservation theme is likely to lead to less waste.

Many of these points may appear to contradict – this is what makes prediction activities so difficult! But in totality they will have ramifications across food patterns.

Thirdly, to influence change within the broad parameters set (and this could still be of major nutritional significance) we must both recognise the difficulties involved and collect the relevant information which will help to facilitate change (Table 4).

Fourthly, I believe we can establish a 'do-it-yourself' guide to aid desired change (or, at least, to minimise the risk of failure). A basic set of 'rules' would take account of the following:

- (i) Since, for a multiplicity of reasons, consumer food habits are changing of their own volition, any recommendation which recognises

Table 4

Key information required before initiating sale of new product

Area	Type of information required
Product usage	When is the product likely to be used and with what foods will it be combined? Will it blend well with these foods?
Product competitiveness	With what other foods will the product effectively be competing? Can it successfully demonstrate some acceptable superiority? If the product is a supplement to be added to existing foods during preparation, then can the addition be justified?
Impact on food habits	Does its acceptance require any major or minor modification in eating habits? If so, can these changes in consumer behaviour be successfully achieved?
Equipment required	Is any new equipment or cooking procedure necessary? If so, can the housewife be easily persuaded to make this change?
Storage	Does the product require any special type of storage arrangement? If so, will these special facilities be available and acceptable?
Advertising copy	How can advertising copy be designed to indicate effectively the fulfilment of a need, overcome competitive products and justify changes in behaviour?
Name	What, from the consumer's viewpoint, would be a suitable name for the product?
Packaging	What sort of packaging would be most acceptable to the consumer?

these changes and works with them is more likely to succeed than one that attempts to go against them.

- (ii) If one can identify consumer attitudes and needs and their ramifications on future choice, then there should be opportunities to devise appropriate new products that take cognisance of these criteria and reflect that climate.
- (iii) If real changes have to be recommended, then it is best to conceal them within existing food patterns (eg, the fortification of bread, or the reduction of the fat content of milk).
- (iv) If, to deal with a problem, actual food habits need to be changed, then it is essential to analyse what is likely to be the effect on overall behaviour patterns, food habits and cooking procedures, and the extent to which the social and economic framework will require change.
- (v) Every attempt must be made to work within the current environment and to avoid outright clashes with the existing fabric of society or its food patterns.
- (vi) Government regulations, in terms of import controls, price manipulation and rationing, will be of great importance if fundamental changes are required.

- (vii) It is essential to ensure that recommended products are available on shelf in the shops, at a price that can be reasonably afforded.
- (viii) It is equally necessary to ensure that the approach is viewed and marketed as a realistic commercial operation.

In such a context a recognition of the likely trends in attitudes and behaviour across Europe, in related food fields, is essential – if only to ensure that we 'push' within the correct context. Three themes seem to be of most significance and these are set out in Tables 5, 6 and 7.

CONCLUSION

This paper has demonstrated the difficulty in identifying precisely what changes are likely to occur. It also suggests that, in really understanding where we are going, we have to look at fields of activity that have little apparent direct relationship to the food market. There are, therefore, many facets to the programme but, if we can get the formula correct, individual specialists can feed in their own precise data and at least receive back some broad indication of likely trends within their field.

Table 5

First theme: that the consumer will become increasingly involved with knowledge (not necessarily accurate) of nutrition, medicine and related matters

Issue to the consumer	Manufacturer-Retailer response emphasis on
Growing nutritional knowledge and Growing health knowledge	Marketing on: Nutrient content Medical 'fashions', eg, roughage Technical terminology
Environmental concern	Conversion, Novel protein foods, eg, soya bean products Appropriate packaging
Consumerism	Quality, value for money, efficacy of claims
Official price information and labelling legislation	Going ahead of controls to stress brand responsibility

Table 6

Second theme: that there will be a growing division, in attitude terms, between foods for nourishment and foods for fun

Foods for nourishment	Foods for fun
Specific meals and parts of meals, eg, breakfast, main course at dinner	Remainder of meal – snack occasions
Designated nutrient intake	No concern about nutrient value (probably better if no nutritional value)
Concern about consumption	No concern about consumption
Need for reassurance from manufacturer	Other than not harmful, no questioning of manufacturer
Intrinsic merits in kudos of products, but should also taste right	Fun to look at, nice taste, good image

Table 7

Third theme: that there will be a growing distinction between formal and casual meals

Formal meals	Casual meals
Very occasional, eg, Sunday lunch or visitors	Very frequent meals
All family eating together	Often people eating alone
More formal surroundings	In kitchen-lounge
Expensive – 'special' meals	Ordinary meals-snacks
Lot of preparation by housewife	Little role of housewife – significant convenience role
Knife and fork	Straight from container

REFERENCE

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