

More than just milk!

Researchers at **TEAGASC** and University College Cork have profiled dairy consumption patterns in Ireland with the aim of identifying market segments for new product development.

Knowledge on consumer attitudes and motivations that underpin dairy consumption behaviour can be powerful in informing new product development strategies and in ensuring appropriate targeting of consumers. An extensive analysis of dairy consumption patterns has been undertaken by researchers in Teagasc, Ashtown and UCC for the purpose of providing a detailed profile of Irish adult dairy consumers. Using data from the National Adult Nutrition Survey of 1,500 Irish adults, dairy food intake from nine categories of products was subjected to cluster analysis to identify dairy consumers' segments. These segments were then profiled based on socio demographic information, attitudes and dietary behaviours.

Seven distinct groups of dairy consumers, with varying dairy consumption patterns, were identified and profiled (see **Table 1** for summary information). Each segment was named to reflect the feature that differentiated it most from the other segments. The 'dairy fuellers' accounted for 9% of the population and consumed the most dairy of all segments. In fact, 20% of their total dietary energy came from dairy foods. They consumed over 500g of dairy per day and the biggest contributor was full-fat milk, consuming practically no low-fat milk and only small amounts of cheese and yogurt. They had the second highest fat intake at 37% and the lowest body mass index (BMI) of all the groups. Members of this group were more likely to be men and physically active.

The second segment was named 'dairy lovers' as they were partial to a little bit of all the dairy foods. At 9% of the population, dairy accounted for 15% of all of the energy they consumed. They were predominantly low-fat milk consumers, with moderate cheese

consumption and high yogurt consumption. They had the second lowest fat intake at 32% and had the highest BMI. Members of this group were more likely to be older rural-dwelling women. Representing 12%, 14% and 11% of the population, respectively, were the 'daily yogurts', 'cheese please' and 'added benefits' segments – all of these segments derived a similar proportion of energy from dairy at around 12%, albeit from different dairy groups. The daily yogurts segment, as the name suggests, consumed more yogurt than the other segments. They had low milk consumption but were more likely to choose low-fat milk if doing so. This group included a greater proportion of women who displayed a high level of motivation for healthy eating. Cheese please, as the name also suggests, had the highest cheese consumption, with low consumption of milk and yogurt. Members of this group were younger and displayed a moderate level of motivation towards healthy eating. All those in the added benefits cluster consumed fortified low-fat milk and were more inclined than other segments to consume yogurts with functional claims. Although there was an even split of men and women in this group, the women were older and motivated by healthy eating.

The two remaining segments, 'conservatives' (23%) and 'dairy dabblers' (22%), accounted for almost half of the population. Conservatives had low consumption of cheese and yogurt and almost all the dairy consumed was full-fat milk. They derived less than 10% of their energy from dairy and had the second highest overall fat intake, with a BMI comparable to many of the other clusters. They were more likely to be men and had low levels of motivation in

Table 1: Clusters of dairy consumption segments and their dietary characteristics for 1,500 Irish adults.

	Dairy fuellers	Dairy lovers	Daily yogurts	Cheese please	Added benefits	Conservatives	Dairy dabblers
Cluster size (%)	9	9	12	14	11	23	22
Age (years)	44	47	47	41	48	44	43
Body mass index	26	28	27	27	27	27	27
Energy derived from dairy (%)	20	15	13	13	12	9	5
Energy derived from fat (%)	37	32	34	37	32	36	34
Fat derived from dairy (%)	27	17	16	21	13	13	7
Full-fat milk (g/day)	467	6	49	64	10	170	11
Low-fat milk (g/day)	2	352	53	43	13	20	70
Fortified low-fat milk (g/day)	0	4	9	3	236	1	2
Cheddar cheese (g/day)	10	7	7	29	5	5	2
Other cheese (g/day)	4	7	7	11	6	2	2
Yogurt (g/day)	18	30	70	9	17	7	6
Functional yogurt (g/day)	16	23	38	4	20	7	7

relation to healthy eating. Dairy dabblers were so named due to their low consumption levels across all dairy groups. They derived only 5% of their total energy intake from dairy foods and were more likely to be younger, with a moderate level of interest in healthy eating.

Dairy opportunities

Knowing what distinguishes one type of dairy consumer from another provides evidence-based insights that can be used to develop strategies to more effectively reach target markets. For dairy fuellers, where milk in particular plays such a significant part in their diet, there is potential for increased consumption of cheese, by promoting its high protein content. However, this needs to be achieved without an increase in the already high fat intakes in this group.

For the cheese please segment, where foods 'on-the-go' have appeal, dairy products designed to offer convenient healthy foods may have appeal as they can leverage on an attenuated interest in health by minimising effort in planning and preparing healthy options.

The added benefits segment members are confirmed functional food consumers. They are looking for more than the intrinsic health benefits of dairy and are receptive to dairy products that are fortified and functional. For these strongly health-motivated older women, who have received and heard the health benefit message regarding fortified milk, tailored products in the yogurt and cheese categories, with benefits that are relevant to their life stage, should be of interest to them. The males choosing fortified dairy were more likely to be moderately motivated to eat healthily, so they may view fortified dairy as a convenient way to eat healthily. Dairy needs to continue to appeal to the health motivation of this group.

However, the fact remains that nearly half of the population (45%) consumes low amounts of dairy, with the conservatives consuming only milk, with little or no cheese and yogurt, and the dabblers consuming very little across all of the dairy categories. The health aspect of dairy foods is not a motivation for consumption in these groups. Convenience may appeal to the conservatives, while novel uses may appeal to the dabblers.

These findings confirm that 'one-size-fits-all' is not the case when it comes to dairy consumption patterns in the Irish population. Equally, consumers' motivations are diverse and the dairy solutions chosen to satisfy these motivations are wide ranging.

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