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The segmentation of the handmade goat cheese market in the Andalusian metropolitan areas: The case of the city of Seville

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Abstract. The aim of this work is to present the segmentation of the Andalusian handmade goat cheesemarket in metropolitan areas, in order to establish training and promotion strategies to be addressed to this sector and to specific niches of consumers. The analysis was performed based on a survey made to a sample of 440 consumers from Sevilla (Spain), stratified by sex, age, and income level. After an overall description of the cheese consumption and shopping behaviour, a typology of the consumers is presented using these variables (cluster analysis), and a segmentation of the handmade cheese market accomplished, according to knowledge, consumption, and willingness to pay overprices for handmade cheeses as the criterion variables, and some behavioural and demographic variables as the independent ones. Significant conclusions were drawn, and some training and promotion strategies established in order to increase the value of these quality products. Among them, working on quality and know-how, training about the specific characteristics handmade cheeses have, enhancing visits to dairies, or placing handmade cheeses in specializing store shelves, are actions suggested by this research team.

Keywords. Market segmentation – Handmade goat cheese – Urban consumers – Andalusia.

La segmentation du marché de fromages de chèvre artisanaux dans les aires métropolitaines de l'Andalousie: Le cas de la ville de Séville

Résumé. L'objectif de ce travail est de présenter la segmentation du marché des fromages artisanaux de chèvre de l'Andalousie dans les aires métropolitaines, afin d'établir des stratégies destinées à la formation et la promotion des consommateurs situés dans des niches concrètes. L'analyse a été basée sur des enquêtes réalisées sur un échantillon de 440 consommateurs de Séville (Espagne) stratifiés selon le sexe, l'âge et la situation économique. Une description des habitudes de consommation a été faite. Au moyen d'une analyse cluster, on a obtenu une typologie des consommateurs, ainsi qu'une segmentation du marché basée sur la connaissance, le mode de consommation et la disposition des consommateurs à payer ou non un prix supérieur en fonction des différentes caractéristiques des fromages. À partir de cette étude, des conclusions ont été obtenues et quelques stratégies de formation et promotion concernant les consommateurs ont été élaborées, afin d'augmenter la valeur de ces produits de qualité. Parmi ces stratégies on souligne les suivantes : travailler sur la qualité et le savoir-faire, réaliser une formation des consommateurs pour qu'ils apprécient les caractéristiques des fromages artisanaux, promouvoir des visites aux fermes et utiliser des établissements spécialisés pour la commercialisation des fromages artisanaux.

Mots-clés. Segmentation du marché – Fromages artisanaux de chèvre – Consommateurs urbains – Andalousie.

I – Introduction

The production of handmade¹ goat cheeses in Andalusia is an example of environmental and socioeconomic sustainable production, besides a relevant element of diversity and rural development (Navarro *et al.*, 2008; Calatrava and Sayadi, 2006). In addition with, the importance of this sector in Andalusia is very high, accounting with 1,073,815 heads in 7,000 farms, and 228 million litres of milk (MARM, 2010). Most of the Andalusian homemade cheeses are produced by small size family firms located in rural areas.

According to the strategic analysis of this sector made by the authors of this paper (Castel *et al.*, 2009), the main strengths the sector has, are related with the links between the production of cheeses and the land: autochthonous goat breeds, extensive management system (as an additional strength), and local know-how. As a result of this, high quality milk, and a huge range of cheese specialties are produced.

The weaknesses of this sector come from the lack of training the cheese makers have on producing traditional cheese recipes, and, at the same time, on the promotion of their products. This fact is a consequence of the still weak integration level the sector has, that reduces the possibility to afford promotion activities. Nevertheless, this issue is being partly solved due to actions as the one taken by QUESANDALUZ, a cheese farmer association devoted to enhance the quality and promotion of the homemade cheeses produced with goat milk.

Despite the market shows threats, most of them coming from industrial dairy firms with a more extensive net of distribution and lower production prices, some opportunities can be taken into account regarding the increasing consumer perception of the quality of these cheeses from the social, environmental, patrimonial and organoleptical points of view.

Based on these opportunities, marketing studies should be made to provide cheese-makers information about the consumption and shopping behaviours people have over cheeses in general, and handmade cheeses in particular. The results presented here (regarding the consumers in metropolitan areas) represent the second set of outcomes this researching team offers after the study of the segmentation of the market of the consumers living in the production areas were made (Navarro *et al.* 2007). Some other niches of consumers, as visitors to the rural producing areas or the catering sector, are in the agenda of this team.

II – Methodology

The methodology used here was based on a survey made to a sample of 440 consumers older than 18 years of age from the city of Seville (Spain), regarding cheese consumption and shopping behaviour. The sample was stratified by sex, age and income level following the Instituto Nacional de Estadística data (INE-Spanish Statistical Institute 2008). The poll, was carried out between October and December 2009. The sampling error was 5% for the estimation of proportions (confidence level 95%). The city of Seville could be clearly considered as the main marketing urban target city for many cheese makers settled in significant Andalusian homemade goat cheese producing areas ("Sierra de Cádiz", "Sierra de Aracena", "Sierra Norte de Sevilla" or "Malaga province").

In addition with the presentation of a descriptive analysis of the data (frequencies or contingency tables), some others statistical methods were used to set a typology of cheese consumers, using the behavioral consumption and shopping variables above mentioned (factor

¹In Spain every single autonomous region has responsibility to legislate about hand made food products, but, unfortunately, there is no definition about what "hand made" cheese means in Andalusia. In this article we are dealing with small size dairy firms processing 500-2,500 l/day of milk, and where labour is significant.

and cluster analysis) or to ascertain the segments of consumers according to the knowledge, consumption, and willingness to pay for homemade cheeses (CHAID analysis).

III – Results and discussion

1. Consumption and shopping behaviour toward cheeses

Andalusian urban consumers are big cheese eaters (93.7% eat cheese at least once a week), but less than those living in the areas of production (Navarro *et al.*, 2007). They prefer mostly cured or semi-cured ewe, goat or a mix of them cheeses, and they are used to consuming cheese at home (93%), at dinner (78.2%) or lunch (42%) times.

Regarding consumption behaviour two clusters of consumers have been found. The members belonging to the first cluster (71.7% of the respondents) prefer cured-goat cheeses (middle age population), but the ones included in the second cluster (28.3% of the respondents) are fond of fresh cow cheeses (the youngest and oldest population).

Despite Sevillians are frequently faithful to a cheese's brand (52.3%), they like testing new cheese types (45.7%). Besides, they usually dislike buying cheap cheeses (only 7.7% buy these kind of cheeses), despite they often tend to buy on sale ones (37.7%).

According to shopping behaviour two clusters were established. People from cluster one (63.9%) are more frequently fond on a specific brand (84.7%), and like asking for advice to tenders, or tasting different types of cheese to compare. These consumers are middle age or older. Respondents from cluster two (36.1%), on the other hand, like buying low price cheeses. This segment usually lives in medium-low income level neighbourhoods.

2. Knowledge, consumption and willingness to pay for handmade cheeses

Despite there is not a clear definition for the agricultural handmade products in Spain (the Spanish catalogue of handicraft's include mostly non-agricultural items) there is a general idea about the characteristics handmade food have to share. Talking about cheeses, handmade production should be related with small production size, close origin of milk, big importance of labour, and know-how.

More than 60% of the sample of consumer states to know the definition of handmade cheese. The consumer's point of view regarding homemade cheeses gives the biggest significance to the importance of labour in the process (55.5%), closely followed by know-how (47.9%), and far from them, to the fact that cheeses were made by the shepherds or stockbreeders themselves. Only the 59.2% of the sample utter to know the differences between homemade and industrial cheeses. These differences, they say, are related to flavour (50.3%), visual look (31.2%), and texture (28.3%). Aroma is not as important as the previously mentioned attributes (9.2%). Other characteristics as packing or labelling are less significant to them.

The segment of the sample stating to know the definition of handmade cheese is older than 50, and usually lives in medium-high income level neighbourhoods. They are daily cheese consumers, preferring cured cheeses, and buying whole pieces of cheese in specializing stores. On spite of this, the most important variable segmenting the sample is the fact to buy cheese in a dairy shop. In Fig. 1, we can see that almost all the respondents (90.5%) who know the existence of some Andalusian handmade dairies seem to know the definition of this kind of products. Among the ones who don't know any Andalusian handmade dairy, those consumers preferring cured cheeses have higher knowledge toward traditional cheeses than the ones liking other ripening types.

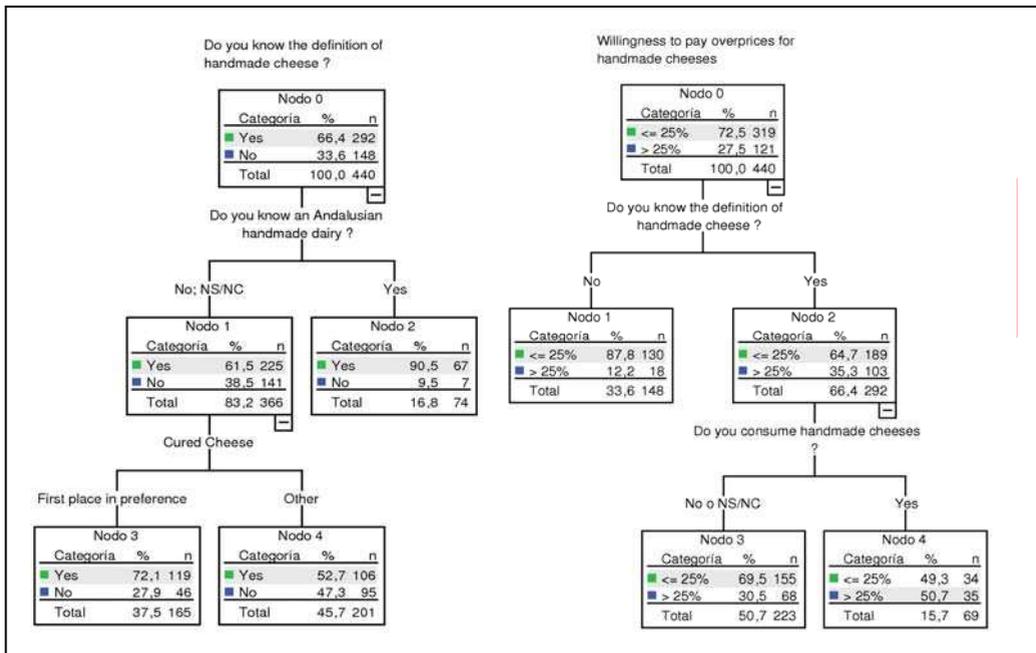


Fig. 1. Market segmentation according to knowledge and willingness to pay (SPSS 15.0 CHAID Method).

The percentage of handmade cheese consumers is very low in Seville (only 16.6%). The main reason for that is because people can not find these cheeses in the market (Pantoja *et al.*, 2010). Some relationships were found between the percentage of handmade cheese consumers and some consumption and shopping behavioural variables, as far as with some other demographic ones. In this sense, people consuming handmade cheeses are big consumers of cheese in general, and like goat cheeses (24.2% and 20.8% respectively compared to 16.6%). Besides, those who buy cheese in specializing cheese shops, or buy more expensive cheeses are also bigger handmade cheese consumers (24.2% and 29.1% respectively).

But the variables affecting the most to the consumption of handmade cheese are the knowledge about the definition of handmade cheese, about their differences with the industrial one, and, most of all, about some Andalusian handmade dairies (23.6%, 30.1%, and 85.1%).

Regarding the maximum willingness to pay overprices for hand made cheeses, 27% of the consumers of Seville will not pay any overprice for them, and only 27.4% of the sample will pay a price 25% and up to the one paid for an industrial cheese. The consumers of this group tend to be big cheese eaters (33.6%), and are used to buying cheese by whole pieces of (32.1%). They are frequently older than 50 (35.2%).

The most significant set of variables explaining the willingness to pay overprices for handmade cheeses, nevertheless, are knowledge (37.6%), consumption of handmade cheese (49.3%), and the fact of being visitors of a handmade cheese diary (47.3%).

IV – Conclusions

The results showed in this paper suggest that some actions should be made in order to increase the value of these quality products. First of all, there is an urgent need to have a clear definition for handmade cheeses, and to work on the control of quality all over the production and distribution process.

Regarding to the cheese maker training programmes, it is important include in them local know-how production techniques, to driven to young cheese makers in order to recover the almost lost old cheese recipes.

Integration under a producer association or a market label is an important issue to pursue, as it is working on consumer's training and promotion programs. It is very important to let consumers to know the characteristics of handmade cheeses, from land to table: livestock management, production process, parameters of quality, etc. For that reason, besides the above said training programs, it is mandatory to place these cheeses in specialized selling points where consumers can be informed, and be able to taste them. In this sense, is very important to succeed, these cheeses go through short radio marketing channels: from a shop in the dairy, to "ad hoc" ferias, specialized shops, or being part of consumer's associations of quality products.

Other actions as: (i) the participation in producing rural areas "heritage" programs regarding traditions, know-how, and cheese nutritional and gastronomic values; (ii) the involvement of cheese makers in tourist's activities (as visits to dairies); (iii) the edition of technical and/or recipe books; and (iv) participation in ferias, cheese competitions, technical seminars, etc., should be also developed. Finally, performing marketing researching studies, is an important strategy that should be underlined.

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