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Product Testing of Indonesian Plant Based Snack Food in Antwerp, Belgium

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Bachelor’s Thesis
Degree Programme in
International Business
2020

Abstract

December 9th 2020

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Degree programme International Business	
Report/thesis title Product Testing of Indonesian Plant-based Snack Foods in Antwerp, Belgium	**Number of pages and appendix pages** **60 + 28**

The European market is considered to be one of the attractive yet challenging markets for Indonesian products, due to competition, regulation and cultural differences. The commissioning company, Adhyata, is a local Belgian company, based in Antwerp. It, which distributes Indonesian ecological products, private label Indonesian fusion sauce and Indonesian catering service. Adhyata, through its B2C brand MailysKitchen aims to introduce Indonesian cuisine and products to the Belgian market.

One of the key products is plant-based snack foods in response to the current clean eating trend. Furthermore, COVID-19 presents wider opportunity for snack foods category due to stay-at-home regulation. To answer this opportunity, a product testing was held to understand how potential consumers in Antwerp perceive Indonesian plant-based snack foods and which factors influence their decision making towards a purchase. Antwerp was chosen as the location of the product testing considering it is the starting market for the commissioning company.

The study relied on qualitative interviews to gain a deep understanding of potential consumers' unique insight and to explore how potential consumers feel and think about, as well as perceive ecological plant-based snack foods. The interviews were conducted in three phases. First, a product testing was held involving 19 respondents who were randomly selected from the company's employee network as well as retail partners' networks. Then, in the second phase, two store owners were interviewed to share their insights on plant-based snack foods competition in their stores and how their consumers perceive plant-based snack foods and the ecological product category. Lastly, the marketing manager of the commissioning company was continuously interviewed on a weekly basis to capture the retail intelligence insight from its retail distribution channel.

By understanding the relationship between potential consumers, ecological products and snack foods selections, this research was able to unearth the reason why the relationship was formed and the connection between consumers' behaviour and perception towards ecological snack foods. Thus, the thesis was able to improve the current product selections, as well as formulate the most effective message to approach the market in Antwerp.

The thesis identified what the potential consumers wish to achieve when they consume plant-based snack foods and described their consumer decision journey. In the end, the study result is essential for the commissioning company to find a solution on how to improve its product selection, product package design, size and material to meet the market requirements, as well as its marketing activities and retail marketing to approach potential consumers in Antwerp.

Keywords
Consumer Insight, Market Research, Plant-based Snack Foods, Indonesia, Belgium, Interview, Jobs To Be Done, Consumer Decision Journey

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1 Introduction

Prior to COVID-19 pandemic, a paradigm shift has taken place in the modern society and is illustrated by the changing perception of the life objective, which is motivated by their concerns on the living situation, political climate and the environment itself.

The year 2019, precisely on July 29th, marked the time when earth has no longer the capability to regenerate its ecological resources to meet humanity's demand and we call that day as Earth Overshoot Day. Since then, most members of society have set themselves the mission of embracing the new goals of life by adding the preservation of the earth for their own good and for the coming generation. With the help of media, technology and other means of communication, the tide of change has spread globally in a short period of time. The convenience of younger generations for being consumptive and living in a time-pressure lifestyle accelerates the global paradigm transformation.

These changes are seen by each person who has an effect on their lifestyle, consumption preferences and behaviors. One example is the food trend in which consumers aim to minimize meat intake or change their diet to non-meat-based proteins, as well as to find healthier and more sustainable food supplies. It has been clearly pointed out that the traditional food production method is no longer sustainable for our planet and Corona virus has proven that we need to change our food consumption habits. (European Commision 2020b).

The food industry itself is undergoing a big shift where customers, Millennials and Gen Z (the demographic of those born after 1990), switch conventional food to all-day snacks. (Emig 2019). The shifting is expected to change snack's landscape in the future. According to The Snack Food Manufacturing Global Market Report 2019, by 2022 the snack food manufacturing market is projected to surge to almost $171 billion by 2022. (The Business Research Company 2020.)

How do brands and producers in the snack industry adapt to the demand with these massive changes? The commissioning company, Adhyata, which faces these obstacles to win the market, is one of those brands. The research was therefore based on product testing to consumers in Antwerp, Belgium, to evaluate how Antwerp consumers perceive Indonesian plant-based snack food and the factors influencing their decision to purchase snacks. The insights and the evaluation from the thesis are being used to establish a further plan in Antwerp, Belgium.

1.1 Background

The company's Indonesian plant-based snack foods can be considered new products in Antwerp with foreign concept in terms of flavor and raw ingredients. New product often faces market challenges. There are three main perspectives to take into account in order to increase the chances of new product success: customer engagement, trends and knowledge on environmental factors that influence the decision of consumers (such as technology, socio-culture and demographic among many others). (Horvat et. al. 2019, 20.)

To satisfy consumer demand, the commissioning company needs to identify these main perspectives. What do consumers expect in this group of products with respect to customer involvement? A survey report on Gen X consumers in the USA and their link between food and health was developed in 2019 by the International Food Information Council Foundation (IFIC) (2019, 31-34). The survey emphasized the importance of the country of origin, the sustainability question and whether the producer is committed to processing food in an environmentally sustainable way to help determine consumer preference for brands or goods (IFIC 2019, 47 - 50). Nonetheless, most respondents are keen to the concept of both locally sourced food and sustainably sourced food.

Their research has shown that most of the Gen-X surveyed have shown that they have excellent health and are familiar with plant-based diets in their daily lives. In which 24% of responses suggest higher intake of plant-based protein compared to the previous year. (IFIC 2019, 31-34.)

On the food trends perspective, Horvat et. Al. (2019, 20) findings indicate that the food trend is one of the most common data used by companies as it has a positive effect on product development. However, unforeseen shifts in the economic, technology, competition and consumer environment should be regarded as data that need to be constantly monitored. (Horvat et al. 2019, 20.) And how would the commissioning company respond to environmental data? According to Garnett (2013), the problem of consumption and the socioeconomic challenge reflect three main viewpoints to explain sustainable food. And do these points represent the food trends in Antwerp?

The goal of this study is to break down the three main perspectives that drive consumers to consume plant-based snack foods. Plant-based snack food category is not yet huge in Belgium, but it has the potential for a higher demand due to the nature of it being a sustainable food source.

1.2 Research Questions

This thesis was designed to understand the demand and competitive landscape of plant-based snack foods on the Belgian market. Therefore, the study was conducted in response to these objectives on the basis of the research question and investigative questions below.

The Research Question (RQ) can be worded as shown in table 1, is *What is the potential market visibility of the Indonesian plant-based snack foods in Antwerp, Belgium?*

The Investigative Questions (IQ) are formulated as follows:
IQ 1. Which brands of plant-based snack foods are available to the consumers?
IQ 2. How do the potential consumers perceive the Indonesian plant-based snack foods?
IQ 3. Which factors influence the purchase of the plant-based snack foods?
IQ 4. Based on the insight of the product testing, what is the recommendation to expand the potential market visibility of the Indonesian plant-based snack foods?

Table 1. Overlay matrix

Investigative Questions	Theoretical Framework	Research Methods	Results
IQ 1. Which brands of plant-based snack foods are available to the consumers?	- Competitors in the market - Snack food trends	- Desktop research - Qualitative research	4.2 Available plant-based snack foods and their price level in Antwerp, Belgium
IQ 2. How do the potential consumers perceive the Indonesian plant-based snack foods?	- Consumer Insight - Social Cognitive - Jobs To Be Done - Consumer Decision Journey	- Qualitative research - Observation	4.3 Consumer standpoint in Antwerp on plant-based snack foods
IQ 3. Which factors influence the purchase of the plant-based snack foods?	- Social psychological - Food psychology - Social ecology theory - Socio environmental	- Qualitative research	4.4 Influencing factors in decision making towards plant-based snack food consumption
IQ 4. Based on the insight of the product testing, what is the recommendation to expand the potential market visibility of the Indonesian plant-based snack foods?	- Consumer Decision Journey - Jobs To Be Done	- Comparative Analysis	5.2 Recommendation for the commissioning company

1.3 Demarcation

From a business viewpoint, this thesis will focus on understanding what the market expects. In addition, the position of the customers was in Antwerp, Belgium, where the product testing was carried out. Consumers are either the residence of Antwerp as well as people who travel to and from Antwerp for school, work or business purposes.

Considering that Antwerp is one of Belgium's economic hubs, as well as being interconnected with Brussels and the Netherlands, the number of people traveling to and from Antwerp is very high, even with the lockdown regulation. With this in mind, the study would cover the availability and visibility of product categories in conventional grocery stores, ecological stores and pop-up stores.

By virtue of the commissioning company's objective, this thesis will focus on Indonesian plant-based snack foods and the available products in the category in Antwerp. Nevertheless, the research study will not discuss over suppliers, substitute products, the regulations by the government nor the promotion activities for this type of product category.

1.4 Benefits

Several parties would benefit from the project: the thesis writer, the commissioning company, the Indonesian Chamber of Commerce and Industry (KADIN), and the Indonesian embassy.

The thesis writer would benefit from first-hand experience in market research and data analysis, which has become two of the highly sought-after skills by the employers, according to a LinkedIn report in 2019 (Petrone 2019).

The success of this research would benefit the commissioning company, the Indonesian Chamber of Commerce and Industry (KADIN) and the Indonesian embassy which are planning to use the thesis to encourage more food product manufacturers from Indonesia to export their commodities to the European Union via Belgium.

In addition, in the near future, Adhyata plans to open several stores in the center of Antwerp selling Indonesian food products to Belgian consumers. The insight into the consumer's perception of plant-based food from the thesis would be a critical part of defining the marketing strategy. On top of it, the outcome of this study would enhance the selection process on the basis of which factors determine the likelihood for a product to be accepted by the Belgian market.

1.5 Internationalisation

At the early stage of the project agreement, Belgium was targeted by the commissioning company as a starting point for the further development of its business. The long-term plan of the project designed by the commissioning company is to expand its business to other EU countries, including the Nordic countries.

The next phase of the research project will also be carried out in other product categories, such as beverages and eco-fashion. Starting in 2021, the commissioning company plans to set up permanent pop-up shops in the main district of Antwerp and other countries.

1.6 Introducing the Commissioning Company - Adhyata

This thesis is developed based on a collaboration project with the commissioning company: Adhyata. The commissioning company was founded in 2018 and is based in Antwerp, Belgium. It was led by a number of experts working in the Indonesian Chamber of Commerce and Industry (KADIN), business matching experts and export/import experts in Belgium.

Adhyata, through its MailysKitchen brand, began its business with Indonesian dining experience in Antwerp, Belgium, targeting urban and affluent consumers. In the early stages of the business, the commissioning company marketed its own plant-based sauces and Indonesian plant-based snack foods to customers. As positive feedback was received, the commissioning company joined forces with the Indonesian Chamber of Commerce and Industry (KADIN) and the Indonesian embassy to introduce Indonesian products in Antwerp, Belgium.

The role of the commissioning company in this project was to provide information of the market in Antwerp and to hold a pop-up shop as a retail outlet for the promotion of Indonesian commodities such as plant-based snack foods, coffee, tea, ecological hand

crafts and eco-fashion products, as well as the company's private label artisanal plant-based sauces.
In October 2019, the pop-up shop was set up in the center of Antwerp, specifically in the shopping center of Stadsfeestzaal, which is situated in the main shopping area. The period of the pop-up shop was from October 2019 to January 2020. Pop-up shop is a temporary establishment operated by a private business which opens within a limited period of time. The environment of Indonesian pop-up store is captured in Appendix 6.

Based on the positive results of the pop-up shop, the commissioning company decided to enhance MailysKitchen's position as a distributor of Indonesian plant-based snack foods and ecological products, as well as its private label of artisanal plant-based sauces. In order to provide customers with product information, the commissioning company has a presence on social media and a website: www.mailyskitchen.com

The commissioning company distributes its products to its retail partners, a major chain supermarket, Asian supermarkets and two collaborative markets. Carrefour Borgerhout, TongFong, BorGerHub and Unit 25 are the existing retail partners as of October 2020. The establishment of the retail outlets of the commissioning company can be found in Appendix 7.

2 Market Demand and Attractiveness Level of Plant-based snacks

The purpose of this chapter is to provide a theoretical framework for supporting research questions. Starting with the introduction of the trend in the food industry in Belgium, followed by Belgian market perspectives, variables that influence food decision-making, perception towards new products and an in-depth look at the consumers perspective.

2.1 Indication on Food Trends in Belgium

If we look at the number of food manufacturing companies in Belgium over the last eight years from 2012 to 2019), we can already see that the patterns in meat consumption are steadily declining. Overall, the number of meat producers decreased by 1.43% in 2019, while the number of fruit and vegetable food producers has increased steadily over the last six years (from 2014 to 2019) as seen in Figure 1. By looking at patterns on the type of food manufacturers, we can take an indirect connection with the food trend itself by following the Supply and Demand theory approach. Low demand equals to low supply.

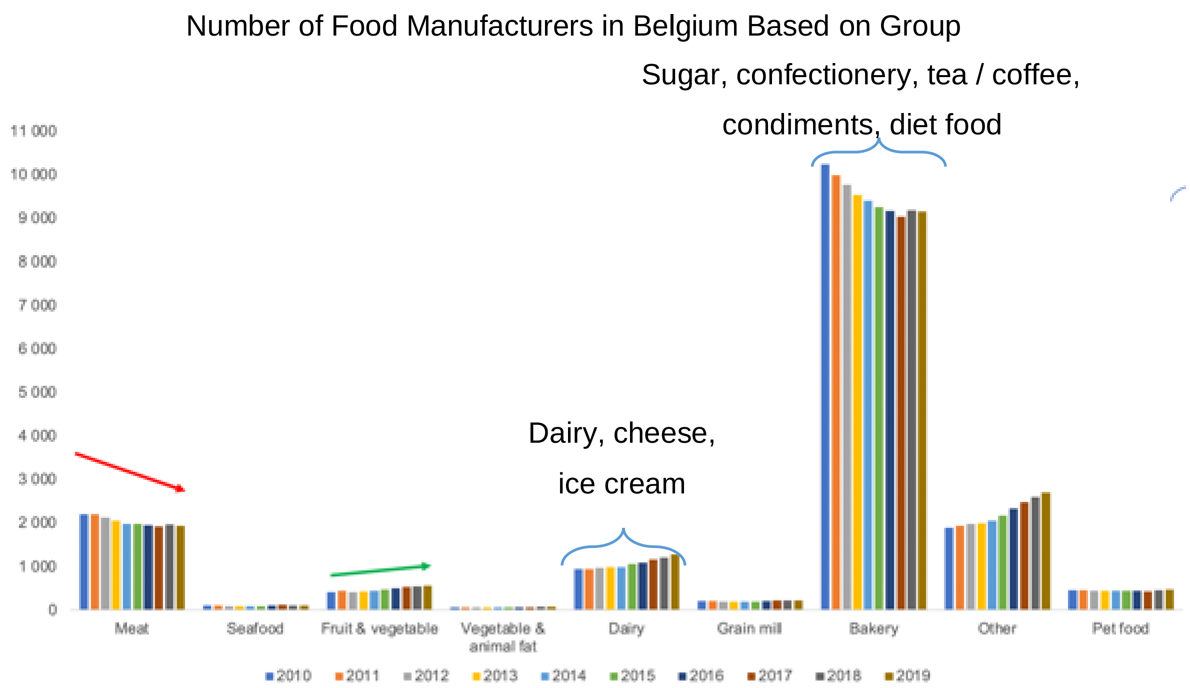


Figure 1. The number of food manufacturers which subjected to VAT in Belgium based on Statistic Belgium's data from 2010 to 2019 (Statistic Belgium 2020).

In a circular flow diagram, firms provide goods / services to household and will be compensated by the household. At the same time, household offers firms with labor service where wages are received in exchange. (Greenlaw & Shapiro 2018, 17.) Less frequent household payment can be affected by a budget constraint, which driven by the fact that consumer or household always trying to maximize total utility or satisfactory. This mindset suggested that there was a strong probability of affecting the number on the manufacturers in a certain category or industry. (Greenlaw & Shapiro 2018, 134.) By using ceteris paribus to assume the affecting factors which are not relevant to economic factors, economist indicate that there are several factors which drive changes in demand, such as: wages, shifting taste or preference, changes in the composition of the population, availability and accessibility of a substitute product(s) and changes in expectations for future prices. (Greenlaw & Shapiro 2018, 56.)

In the case of food manufacturers in Belgium, the shift in the degree of satisfaction or utility that consumers would like to increase has the potential to push down demand for meat production, which has contributed to a decrease in the supply of meat production. While other factors, such as changing taste or preference and availability, as well as accessibility, may contribute to lower demand for meat-based food production.

Behind the growing number of fruit and vegetable food producers, there are various factors that contribute to the success of the product in order to win the market. One of the reasons was the purchasing business which shifted from a supply-driven model to a market-driven one (Burrows, Lora & Hackett 2012, 2). According to a continuous study which is performed in European Union region, the top three trends which will influence Europe’s food sector in 2035 are new nutrition pattern, functional food and vegan-gluten free. (Fraunhofer 2020).

2.2 Belgian Consumer Insight

There are three separate stages at the level of consumption for European customers. The pre-purchase stages cover the compilation of information on the products, followed by the purchase phase, which represented the purchase experience itself and the influencing factors. Lastly, post-purchase, which reflects the consequences post experiencing the consumption which will later determine the future consumption. (Solomon et al. 2013, 7.)

In general, European society values the cultural symbolism of the product rather than the primary function of the product itself. The value reflected by the product has been translated into a better taste of the product, which stems from the perspective where consuming the product become consumer's own experiences. (Solomon et al. 2013, 35 – 37.)

Before launching a new product on the European market, firms often test a small portion of market to understand market's reaction. Cultural diversity indicates that Belgium is a promising market for a new product to test the EU market, as Belgium is divided into three main regions, the Dutch-speaking, the German-speaking and the French-speaking. This main factor is favored by the USA which sees Belgium as one of the major trading partners and sees Belgium as the ideal testing ground before the expansion on the EU market. (International Trade Administration 2019b.)

From economic point of view, the rise of disposable income is projected to match the number of private consumptions in Belgium. The US market intelligent showed that Belgium had a foreign trade surplus of approximately EUR 14 billion in 2018. (International Trade Administration 2019a.) This figure indicates an opportunity for firms to consider the Belgian market as a potential market.

From historical perspective, the relationship between the Belgians and their food intake has centralized their diet on meat and processed meat followed by carbohydrates, dairy products, alcohol and preserved berry consumption (Scholliers 2009, 41). The first appearance of vegetable consumption was first published in a recipe manuscript dated to the late 19th century or the early 20th century (Scholliers 2009, 48). Historically, the official starting point for the penetration of foreign culture infiltration in Belgium was in 1490 when Antwerp was established as the commercial center of Europe (Scholliers 2009) or in 1400, where the Belgians were recorded to consume both local and imported fruits as part of their diet (Scholliers 2009, 12).

In modern times, food consumption is based on three related phenomena: food safety, overweight and body ideals (Scholliers 2009, 185). To understand the overweight issue, research in 2018 concluded that up to 2014-2015, 36.4% of Belgium's food intake consisted of ultra-processed food. The products that contributed most were cakes, pies and pastries. Research published in 2015 concluded that ultra-processed food was perceived to be a low-quality diet. (Vandevijvere et al. 2018 32.)

Needless to say, modern society in Belgium is showing much less neophobia of the new and international food concept. Citing the research carried out in Belgium in 2005 on the Belgian perspective on ethnic food, the key attributes of the level of acceptance are taste and appearance. In general, the vast majority of Belgians are positively correlated to openness to new cultures. However, part of the Belgian consumer who is negatively correlated with food neophobia, are the urban and the above 55 years old. (Verbeke & López 2005.)

In order to better understand the impetus behind perspectives for food and new culture, this thesis refers to the Social Cognitive Theory, which helps to understand how each consumer acquires a unique way to maintain behavior. At the same time this theory helps to explore the environment in which they perform that behavior. (SPH Web Edu 2020.) In this case, the Social Cognitive Theory studies the reciprocal interactions between an individual, their social environment and their behavior towards the consumption of food.

A study on the effect of social cognitive theory-based interventions on dietary behavior in children, indicated that there are several factors which responsible for changing children's eating behavior, such as knowledge, food choice, social environmental factor and behavioral. These are main factors that affect healthy eating decisions in children. (Rolling & Hong 2016, 2 – 3.)

2.3 Factors Which Influence the Decision Making Towards Food

Nowadays, individuals are concerned about the foods that they buy and consume. They want to know the information about the origin, the method of production or whether the food intake will prevent certain health problems before they consume their food.

The Social Ecology Theory helps to explain the relationship between behavioral towards food consumption and the influencing factors, as well as to provide guidance for the development of a successful approach to the healthy food consumption through social environment of each generation (Keller RD PHD et al. 2007, 40). As an example, a study in Brazil and Spain on the driving factors behind the decision of Millenials in the purchase of organic food, suggested that social and health benefits trigger the decision-making while pricing-wise, the premium pricing did not diminish consumer willingness to purchase organic products (Molinillo et al. 2020, 7).

Nevertheless, self-regulation of appetite can be compromised by the internal and external factors (Stoeckel et al. 2017, 18). A study suggested that from the social psychological perspective towards food choice and nutrition, the predictors of healthy eating are intention, perceived behavioral control and confidence (Hardcastle et al. 2015).

For adolescents there are several key factors which influence food decision-making, for example, the cultural aspect where one is accustomed to serving food in a certain manner, as well as what would be considered as food (Asp 1999, 288). At the same time, the psychological aspect often plays a significant role, and may be linked to the sensory of smell or taste (Asp 1999, 289). Prescott (2015, in Prescott 2004) noted that multi-sensory flavor is considered as a perceived property of the food rather than individual sensory attributes.

There are for main factors that place the internal thought mechanism in the decision-making of food, namely genes and hormones, neural and cognitive function, social function (psychological, behavioral and emotional character), as well as self-regulation that controls goal setting and goal striving (Stoeckel et al. 2017, 18).

Neural function affects the self-regulation based on the complex brain network to control processing rewards through subcortical bottom signal, as well as to regulate behavior through prefrontal cortex, which will regulate the executive functioning. The executive functions are a set of cognitive processes to attain chosen goals, such as planning, solving problems and working memory amongst many other things. While the social functioning is developed during the intergenerational transmission on the basis of driving factors such as parental decision-making, familiarization process and associative learning process. Both neural function and social function will later establish the temperament of the child as a reaction to these factors. On the later stage, these factors would develop the influencing cultural factor. (Asp 1999, 288; Stoeckel et al. 2017, 20.)

Lastly, the goal setting and goal striving will conceptualize the appetite self-regulation. People are more likely to pursue a goal if they are motivated by the pleasure of the effort to pursue the goal or if there is external pressure(s). In general, there are three strategies for striving for goal. First strategy is the episodic future thinking where a person seeks reward, followed by self-regulatory demands which rely on autonomy with little to no awareness by creating habit. Lastly, by changing the perspective about the temptation, by associating food with an abstract idea such as ideology or goal to achieve. (Stoeckel et al. 2017, 21.)

On top of the internal factors, there are as well external driving factors affects the thinking process in taking decision towards food such as food selection, physical factors of the food itself such as taste, smell and packaging, as well as social setting such as lifestyle and food trends. All these factors may dictate the response from the person positively or negatively such as food neophobia.

Food neophobia or the reluctance to experience new cuisine is affected by age, level of income, level of education, urbanization, culture and the one's ability to identify sets of odours. Food neophobia may also be associated to less consumption of fish, poultry, vegetables and salad combination. Food neophobia can come in the form of wariness to new or foreign cuisine in order to avoid the unpleasant encounters with malodour. (Siegrist, Hartmann & Keller 2013, 296; Dematte et al. 2013, 115.)

A longitudinal study about eating behaviour in Switzerland or known as Swiss Food Panel, which was conducted in 2010, indicated that food neophobia was less likely to occur on female respondents. While those who valued locally sourced food were more likely to be identified with food neophobia. These respondents considered locally sourced food to have higher quality and higher safety requirements. This idea would deter them from experiencing new or foreign cuisine. (Siegrist, Hartmann & Keller 2013, 296.)

The packaging, pricing (premium or fair pricing), quality and sometimes, the country of origin are other external factors influencing the food decision-making. Consumers especially often emphasize the importance of the packaging as they come to take a decision on food. In a broader sense, the packaging reflects the perception of the food product itself. From the design to the material of the packaging. Perception of an appropriate color, design, packaging typography and image are correlated to the perception of product positioning. (Ampuero & Vila 2006, 107 – 108.)

Naturally, there are other external factors such as food trends, lifestyle factors, health issue and social setting, which play important role in balancing food decision-making as well. In this case, social setting involves family and peer influence. (Asp 1999, 290; McKeown & Nelson 2018, 474.)

Food trends are a dynamic process. In 2015, Fortune magazine documented a major shift in food industry that shaped a new food trend. The new food trend has been influenced by a change in consumer preferences where they demand fresh products, less processed food and contains ingredients that they are familiar with. This transition was marked by the big food war, which refers to close rivalry between multi-billion firms. (Kowitt 2015.)

Recently, the consumption of meat is no longer popular for some groups of consumers. Modern consumers have begun to turn to plant-based food consumption or simply being a flexitarian, by consuming less meat for a number of reasons, such as ethical reason, environmental reason, health concerns, accessibility in the local market, income levels and socio-environmental. Socio-environmental is defined by the existence of a life partner who influences one's decision. (Von Massow, Weersink & Gallant 2019; Kamphuis et al. 2006, 631-632.) A Nielsen (2018) survey in 2018 showed that the number of households in the United States which interested in sustainable products has risen by 64%. Growth indicates that there is potential for sustainability practice to grow higher in the future. (Nielsen 2018.)

The positive attitude towards sustainable products is also reflected in the preference of packaging material of the product. This positive attitude can be driven by gender, levels of environmental awareness, willingness to pay, age and many other factors. For example, younger consumers with a higher education level tend to be more determined in their final choice than older consumers with a lower education level. (Steenis et al. 2017, 290; Martinho et al. 2015, 66; Prakash & Pathak 2017, 391; Van Birgelen et al. 2009, 144.)

However, the above listed influencing factors rarely affect snacking decision-making. According to a study in 2015, some of the reasons to snack are to balance unpleasant experiences, stressful encounters or high arousal situation. Being engage in activities or on the contrary without the presence of another people, may also lead people to snack. (Schüz, Schüz, Ferguson 2015, 6).

2.4 Perception of New Products

When a product or service enters a new market, the new product or service maybe embraced or resisted by the market. Understanding the factors that will drive the response of the consumers against new product or service would provide an effective strategy to approach the market.

“The production and marketing phase do not depend exclusively on the organization; the important actor in this relationship is the future consumer” (Cornescu & Adam 2013, 458 - 461). Based on the theoretical research conducted by Cornescu and Adam (2013, 461), there are four categories which determine the response of the market: the perception of the market in terms of innovation characteristics, the characteristics of the consumer himself, the method used to provide the necessary information on innovation, and the opinion of the influencers. (Cornescu & Adam 2013, 461 - 464.)

Another factor affecting the chances of acceptance and rejection was indicated by another study which highlighted the value of access to information for the consumer. It is less encouraged to enforce information to the consumers, rather the information should be ready when it is needed or requested by a consumer. At the same time, the information should convey both the value of the innovation for the consumers and how to minimize the potential losses. (Kleijnen et al. 2009, 354.)

2.5 In-depth Look at The Consumer Perspective

Understanding the customers starts with understanding what they want to accomplish. The customers in their daily life always want jobs to be done. For example, to hang a picture on the wall, a consumer will need to make hole in the wall and a nail to hang the picture. His goal is to hang the picture and not to make a hole. The job that he needs to do is making a hole in the wall, in order to hang the picture on the wall. Therefore, he needs to employ a product to perform the job, for example a drill to make a hole in the wall. A product should understand which jobs are needed to be done by the customers. This theory is named Jobs To Be Done theory (TBD) and addressed by a professor in Harvard Business School, Clayton Christensen (2016).

In the market, there is always competition from other products which can perform the jobs for the consumers. The question is how will our product compete to do a better job than the competitors? If our product performs a better job, people will hire our product over and over again. (Christensen et al. 2016.)

Often the consumers do not use our product as what we intent to. Thus, we need to consider which jobs are needed to be done by the consumers, that encourages them to hire our products to do the job. Christensen (2016) mentioned that when you can make a product that is affordable and accessible, people will realize that they can get the job done by using your product. However, job is not something that can be taken lightly in this context. “Jobs” is the notion of what consumers really want to accomplish with certain circumstances. Understanding the circumstances means understanding the situation wherein the consumers are bound to get their expectations. Job is not only about function, but it has powerful social and emotional dimension. (Christensen et al. 2016.)

When we look back at the previous example, the consumer wants to hang a picture. Why does the consumers want to hang the picture? What picture will he like to hang on the wall? Is that the photo of his family members? Is it a well- known painting to declare his wealth? If the consumer wants to hang the picture of his family to show how happy his family is, it might indicate the value of family in the house. Therefore, the product should reach the consumers by emphasizing the features of the product that can offer what the consumer wishes to accomplish. In certain situations, the product might also be able to adjust its features to meet the needs of the consumer. (Christensen et al. 2016.)

It is important to consider what consumers want to achieve. The Jobs-As-Progress implies that innovation should eliminate the pain points of consumers in order to accomplish what they want. For example: UBER wins the market and beats the traditional taxi by eliminating the pain points of customers, such as long wait at taxi queue, broken EDC and scam fare amongst many other things. UBER gets the job done for the customer by transporting them from one point to another point. (Wunker et al. 2017, 5.) There are three kinds of jobs to be done by consumer. Functional jobs or job drivers are the goals to be achieved by consumers (Wunker et al. 2017, 18). Emotional jobs are the how the consumers want to be perceived or want to feel by doing the jobs (Wunker et al. 2017, 6). Consumption jobs are what customers have to do to utilize a solution. (THRV 2020.)

With the understanding on which jobs needed to be done by the customers, the marketer can then go through the process to find when to reach the customers at the right time. The best time to captivate the interest of the customers and educate them about how the product can fulfill the jobs they want to be done.

According to McKinsey (2017), a global business consulting firm, marketing has one goal that is to reach customer at the right time. While the number of the people influenced by the marketing message may be reduced to a smaller percentage during the process. The modern-day marketing is called consumer decision journey where explosion of product options, digital channels, the emergence of an increasingly discerning and well-informed consumer are key factors. Modern-day consumers often have lesser degree of loyalty to certain brands. (McKinsey Blog 2017; Santee 2011, 105.)

One of the frequently used methods of capturing the consumer journey is by preparing the Customer Journey Canvas to define t the consumer’s experience of the product, at every stage and at every touch points. A brand will also benefit from an insight on how to support the pleasant experience of the consumer. (Leahy 2019.)

With the understanding of the consumer purchase journey, marketers are able to respond how consumers make their decision by devising the blueprint of the consumer decision journey and strategize the touch points based on the circular journey of the consumer decision journey. (Court et al. 2009.)

However, consumers are evolving in this digital age. There are now three main paradigm shifts in marketing due to the emergence of digital technology, namely: first moment of truth (the process of consumer decision-making towards product purchases that could be influenced by product packaging, label or placement in-store), Zero Moment of Truth (the moment social media influences the consumer decision-making process) + Customer Decision Journey (the circular journey of consumer decision-making) and The Accelerated Loyalty Journey (the circular journey of consumer decision-making where advocacy phase drives to build bond between consumers and brands. This avoids the repetition of the cycle of consideration and evaluation phase. (Su 2017.)

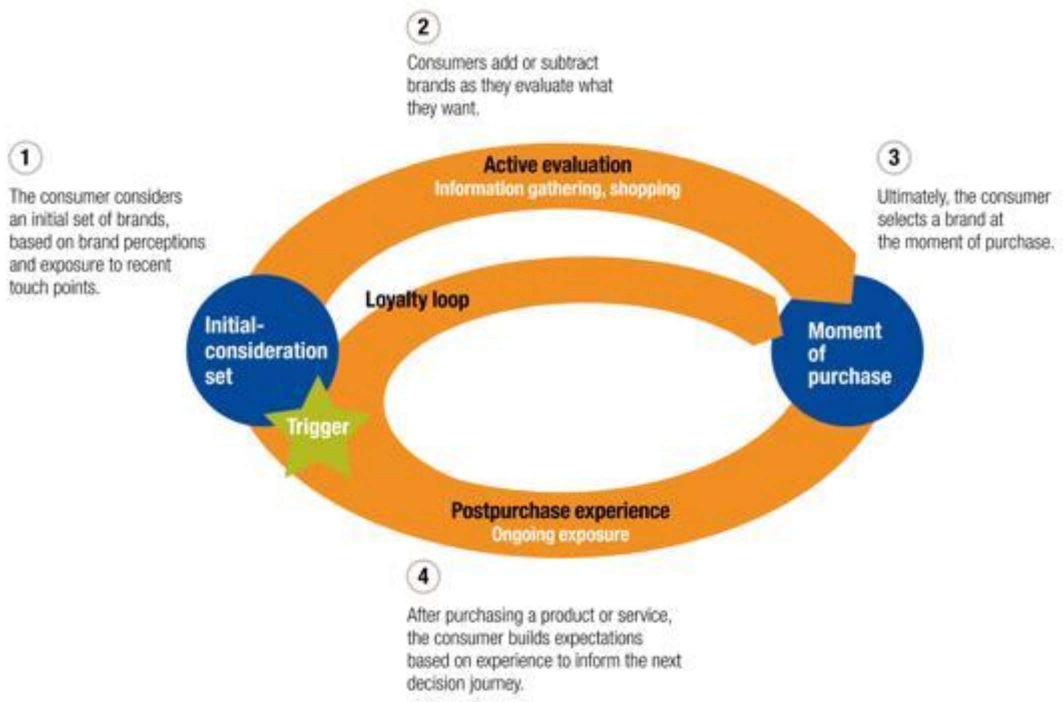


Figure 2. The consumer decision journey method (CDJ) (Court et al. 2009).

3 Research Methods

This chapter covers the research design and methods of the three phases of the research itself. Qualitative method has been used to perform the research study. The decision to apply qualitative approach was appropriate for this research in terms of having more meticulous acumen and exploring alternatives for making appropriate informative decisions on the marketing strategies. By applying qualitative research, the study needs to make sense of the subjective and socially constructed meanings expressed about the phenomenon being studied. (Saunders et al. 2016, 168.)

The strategies to approach the research study were through case study, by using the brand of the commissioning company and the commissioning company itself, as object of study, as well as archival and documentary research through continuous documentary of the communication with the marketing manager of the commissioning company.

This thesis combined the primary and secondary data. The primary data consists of semi-structured interviews with a group of potential consumers, the store owners and visitors in Antwerp, Belgium. While the secondary data which consists of desktop research insight on global and local Belgium food trends, social psychology, social psychological and the social cognitive theory in relation to food preference, as well as the customer decision journey in the purchase of plant-based snack foods.

In order to ensure the reliability and the validity of the secondary data, this research study focused on the literature review based on previous scientific studies performed by scientific communities and published on scientific community or journals or books, as well as news stories, European Union or the Government's open access data base, in the last two decades.

3.1 Research Design

The research is designed to be done as **exploratory study** and likely to begin with questions that start with what and who. These questions were aimed to explore an issue or phenomenon. Exploratory study was considered suitable to conduct the study due to the benefit for being flexible and adaptable to change. (Saunders et al. 2016, 174.) Particularly, in this study on the plant-based snack foods where the market is still niche and Indonesian products are not considered as accessible for wider consumers.

The research used **cross-sectional studies** and carried out three phases of interviews with three respondent groups: visitors to pop-up shop, owners of the healthy food stores, and the marketing manager of the commissioning company. The study was performed from October 1, 2019, to August 28, 2020.

The three phases in this research study were carried out by using the multi-method Qualitative study to find a deep understanding of the behavior and perception of snack foods, as well as the decision-making journey of the potential customers in Antwerp, Belgium. The result is expected to illustrate the targeted audience of plant-based snack foods and the level of attractiveness of the products.

Qualitative Research is often associated with an interpretive philosophy, since the researcher has to make sense of the subjective and socially formed meanings conveyed in terms of the interpretation of the subject by potential customers. Which in this study refers to how the potential customers in Antwerp perceive the Indonesian plant-based snack foods through product testing. Qualitative Research studies the meaning and relationship of respondents, using the semi structured interviews and analytical procedures, to establish a conceptual framework and theoretical contribution. In this qualitative research the meanings are symbolized by words and images. (Saunders et al. 2016, 179.)

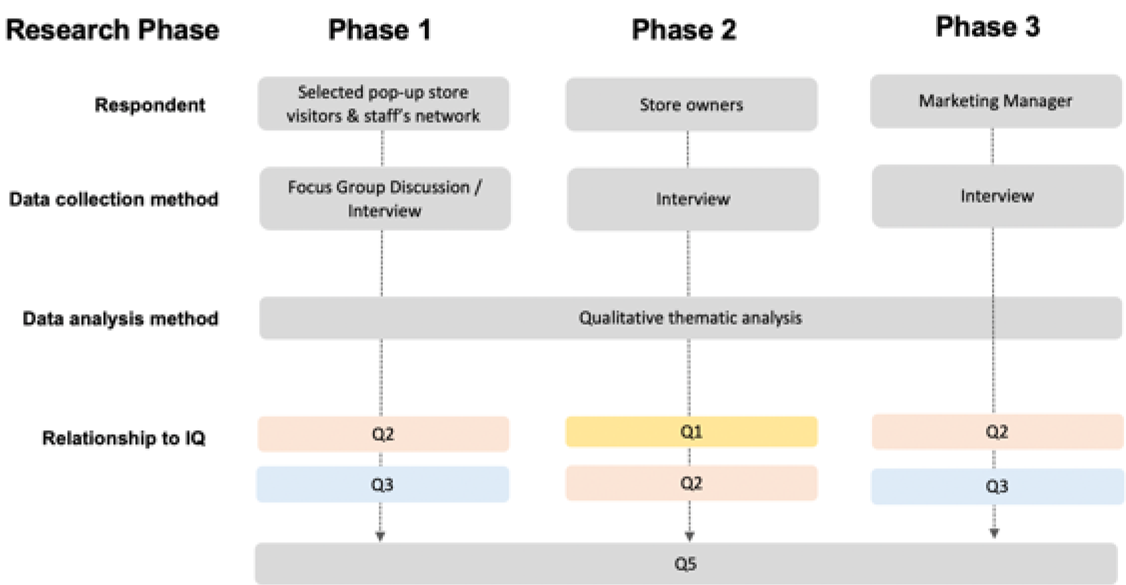


Figure 3. Research Structure

3.2 Sampling and Data Collection Method

The sampling method is one of the most critical steps in conducting this research due to budget and time constraints. Potential consumers in Antwerp who consume snack on a regular basis and are interested in seeking alternative snack food choices are the target demographic in this research. Each phase of this research used non-probability sampling method, which provides a range of alternative techniques to select samples, most of which involve a subjective judgement aspect. (Saunders et. al. 2016, 315.)

In qualitative research, to achieve the appropriate sampling size is by conducting semi-structured interview(s) until data saturation is reached (Saunders et. al. 2016, 315). The research divided the sampling target into five separate categories, full-time employees, students, housewives, store owners in the city center and the marketing manager of the commissioning company.

The sub-chapters cover the sampling and data collection method for each phase.

3.2.1 Phase 1

The target respondents in this phase were the potential consumers in Antwerp. The potential customers may be residents of Antwerp or people who regularly travel to Antwerp. For this purpose, the respondent was chosen from the pop-up store visitors and the students at the university, which was suggested by the commissioning company. All the respondents had agreed to join the semi structured interview on the premise held on October 16, 2019.

In order to ensure the reliability of the data, there are several conditions need to be highlighted before the potential sample is considered as eligible for interview phase 1:

- Respondent was born and raised, or has been living in Belgium or other non-Asian countries since at least the youngest age,
- The gender of the respondent and residence in Belgium do not play an important role in the matter,
- The age of the respondent is between 16 to 60-year-old to ensure that the respondent is in a productive age group,
- The respondent has no chronic food allergies, such as celiac disease and protein allergies amongst many other things,
- The respondent is familiar with internet usage and mobile device on a regular basis,
- The respondent had no prior personal relation to the writer.

Semi structured interview was determined as the method of data collection due to the nature of the directions of the conversation between the researcher and the respondent. Semi structure interview enable researcher to control the conversation while exploring the list of predetermined themes of the interview. Followed by key questions related to these themes, to guide the conversation. (Saunders et al. 2016, 437.) During the conversation, often respondent bring new information related to the themes. In this case, researcher used a more structured and consistent approach in which each theme is explored with each respondent.

The semi structured interview was deemed more fitting than the unstructured interview method due to the level of experience of the researcher. Unstructured interview approach requires advanced skill of interviewing to explore the themes of the study while control the direction of the conversation.

The first phase semi-structured interview was conducted with four students, one self-employed respondent, six full-time employees and one stay at home parent who volunteered to attend the session. The first phase interviews were conducted using the list of themes and predetermined questions as appeared in Appendix 1 and Appendix 2.

To gain access from the respondents, an online invitation was delivered to recommended group of respondents from universities, other tenants in the pop-up premises and the visitors of the pop-up store prior to the interview sessions. The invitation for the recommended groups from the universities was delivered by the employees of the commissioning company, while the invitation for other tenants at the pop-sup store premise and the pop-up store visitors were delivered to potential invitees through email or Whatsapp cha, which was provided on a voluntarily basis upon data collection. The invitation for phase 1 can be found in Appendix 9.

The interview respondents will be referred as respondents A – L:

- Respondent A, male, full-time employee
- Respondent B, female, student
- Respondent C, male, full-time employee
- Respondent D, female, student
- Respondent E, male, student
- Respondent F, female, student
- Respondent G, male, full-time employee
- Respondent H, male, full-time employee
- Respondent I, female, student and part-time employee
- Respondent J, female, self employed
- Respondent K, female, stay at home parent
- Respondent L, female, full-time employee

The interview was done in seven separate sessions, based on the agreed schedules with the respondents. Each interview session consists of one single respondent or a group of respondents from the same circle. The interviews took places in the pop-up store location, the working place of several respondents and the residency of a respondent, subject to the availability of the respondents.

The interview started by introducing the purpose of the research study and allowing each respondent to share the information on their background. Later, the respondents were giving cards with several influencing factors in decision making towards plant-based snack foods.

3.2.2 Phase 2

In the second phase, the store owners in Antwerp city center were the target respondents, specifically a store that sells snack foods or organic snack foods or plant-based snack foods. The commissioning company helped to reach out to its network of retail channels for this purpose and sought the willingness of store owners to participate in the interview session. Prior to the interview sessions, all potential respondents received an email invitation to take part in the interview session in the light of understanding the market demand on the plant-based snack food products based on store owner's observation. One sample of the email invitation for the potential respondents is attached in Appendix 5. All the agreed respondents were contacted via SKYPE video calls which were held between February and April 2020.

In order to ensure the reliability of the data, there are several conditions need to be highlighted before the potential sample is considered as eligible for interview phase 2:

- The respondent is a store owner which located in Antwerp, Belgium,
- The age, gender of the respondent and residency in Belgium do not play a significant role in the matter,
- The respondent is familiar with internet usage and mobile device on daily basis.

The interview respondents will be referred as respondents M – N:

- Respondent M, female, organic store owner
- Respondent N, female, organic pop-up store's owner

Similar as in the first phase of interview, semi-structured interview was considered sufficient to gain insight from the store owner by using a list of themes and and some key questions to be covered as shown in Appendix 3 and Appendix 4. Semi-structured interview functioned to prompt further conversation and probe answers.

On the second phase interviews respondents received a list of themes and key questions in the form of a Microsoft Word document sent via email prior to the interview schedule. Upon the agreed timetable, the interviews were performed at two separate times based on the availability of each respondent. The online interviews were conducted via SKYPE and the conversations were recorded with respondents' prior consent.

The interview was started by asking respondents about their background information. Followed by their observation on the plant-based snack food products and the demand from their store visitors, as well as the competition between the products available and the store requirements for those products.

3.2.3 Phase 3

The last interview process was conducted by holding several semi-structured interview sessions on several timelines. The respondent was the marketing manager of the commissioning company. The series of interviews were conducted between March to July 2020, via SKYPE or Whatsapp.

The series of interview sessions were conducted on a weekly basis to gather insight based on the observation of the commissioning company on the traffic of its retail channels as described in the section 1.6. As part of their marketing activities, the commissioning company gather insights from its stores traffic by conducting observations. The observation results were recorded on an online daily journal by the marketing manager of the commissioning company.

The observations on the traffic to the stores of commissioning company were achieved by performing observations on the traffic of the stores and engaging in a friendly conversation with the store visitors who visited the commissioning company's section in the store. The marketing manager and the retail staff of the commissioning company take notes on the observation results and the conversation insights.

Since the social media of the commissioning company existed from the first day of the pop-up store, the marketing manager and the writer were able to gather insights and build insightful judgements which later applied directly to the company's social media. The gathered insight was documented on the same online daily journal managed by the marketing manager.

3.3 Data Analysis Method

The data collected from the interview sessions, both on-site interview and online interview were transcribed manually from the audio recording file to Microsoft Excel document. Excel document provides access only to the researchers and when deemed necessary, to the thesis advisor. The Microsoft Excel document provides analysis which represents the Belgian consumers and the store owners in Belgium.

In order to interpret data from various transcripts and notes, thematic analysis was chosen, which was later used to define trends for further exploration. A thematic description was then generated, and explanations and theories were developed, from which conclusions were drawn and verified. (Saunders et. al. 2016, 579.) On this specific analysis, the process began by grouping the data in each row based on each respondent, followed by analysing the data collection. When the data was analysed, on each column, the responses from each respondent were arranged based on each question, which then generated twenty-six columns.

On the first and third phases of interview, the columns were grouped to two groups which later represents IQ 2 and IQ3 as follow:

- Introduction and warm up session which provides background information of each respondent, for example name, age, occupation and their interest in snacks which led them to voluntarily enter the research interview,
- Followed by the session which provides insights into the understanding of respondents regarding plant-based food, their prior experience with plant-based food and the awareness of some products that may be associated with plant-based food,
- Moving forward, the session continued to investigate the influencing factors towards the decision making of plant-based food, from the product, the packaging to the marketing activities to promote plant-based food product category

On the second phase of interview, the columns were grouped to two groups to represents IQ 1 and IQ 3 based on the perspective of plant-based food sellers as follow:

- Introduction and warm up session which provides background information of each respondent, for example name, age, occupation and their interest in snacks which led them to voluntarily joined the research interview,
- Followed by the session which provides insights on the respondents' insight on the competitive landscape of plant-based food, the drivers on the consumers and the plant-based food trends,
- Moving forward, the session continued to investigate the requirement and the qualification for the commercial plant-based food products.

The data analysis was the carried out by highlighting and classifying the most frequent themes for each question from each of the responses. The highlights of each classification note the indication of the popular mindset amongst the respondents.

3.4 Research Ethics, Validity and Reliability

Before the interview session began, the respondents were provided with details about the intent of the research study and the use of the insight from the research study. The data collected is handled anonymously, confidentially and protected by General Data Protection Regulation (GDPR) without disclosing any information which might reveal the personal identity of each respondent.

Data reliability refers to the replication and quality of the data obtained and insight, while validity refers to appropriateness of the measured used, accuracy of the analysis of the results and generalisability of the findings (Saunders et al. 2016, 213).

The analysis consisted of nine separate interview sessions to ensure that the data obtained is at the point of saturation and no deviance is detected. During conducting the interview sessions, each interview session was assisted by one of the commissioning company who speaks several local dialects in Belgium, to translate or to intermediate between the researcher and the respondents as necessary.

The types of measurement of a qualitative research are often considered as philosophically and technically inappropriate and an alternative quality criterion is therefore required (Saunders et al. 2016, 216).

To validate the data, the research analysis was done by applying two techniques (Saunders et al. 2016, 218.):

- Triangulation technique where the research study using more than one source or more than one method of data collection,
- Member validation method where the interview result is validated by the respondents after each interview session.

The validity and the reliability of the research study can be enhanced by performing surveys to the stores traffic during certain period of time. Nevertheless, the commissioning company did not wish to interrupt its potential customers during their visits at the stores. Therefore, in this case the wish of the commissioning company was respected and taken into action.

4 Research Results on The Belgian Consumers

This chapter covers the results of the research. The result presentation shows the background information of each respondent and the linkage and the diversity between each respondent. By categorising the data, the result findings were able to display the trends of the plant-based food category through the lenses of the customers and the store owners, how the consumer perceives the plant-based snack food category in general and the main deciding factors.

4.1 Introducing the Respondents

The respondents for this study were divided by the three phases of the research itself. In general, to gather further insights on the Belgian's perspective towards plant-based snack foods, the research sliced the sources to the Belgian customers and the store owners. On this research, the gathered insight was focused on the analysis of the semi-structure interviews with the Belgian customers and the store owners, followed by the observation of the Belgian store visitors in Antwerp and Mekelen area.

The respondents of the first phase interview were five full-time employees, four students, a part-time employee, an entrepreneur and a housewife with children at home. The youngest respondent was 19 years-old and the oldest respondent was 50 years-old, and the age of the respondents was widely distributed. There were five male and seven female respondents. Nevertheless, gender did not suggest that it was a driving factor in decision making based on the interview results. The age factor, on the other hand, suggests a certain role in the process of decision-making.

The residence of the respondents was distributed in Antwerp city central, Ekeren, Gent and Breda (The Netherland). However, all of the respondents commute to Antwerp city centre on a regular basis to reach their workplace, business premises and university or school.

Based on the residence of the respondents it is safe to conclude that most respondents do not require long-distance journey on a daily basis, while six of the respondents require a minimum one-hour journey on a daily basis and one of the respondents require a minimum two-hour journey on a daily basis.

Respondent	Gender	Age	Profession
A	Male	40s	Full-time employee
B	Female	23	Student
C	Male	42	Full-time employee
D	Female	20	Student
E	Male	20	Student
F	Female	20	Student
G	Male	30	Full-time employee
H	Male	29	Full-time employee
I	Female	19	Part-time employee
J	Female	50	Entrepreneur
K	Female	40	Housewife
L	Female	40	Full-time employee

Figure 4. Gender, age and profession of the interview respondents

The student and the part-time employee rely heavily on internet for their study, commuting journey and personal time. Although the full-time employee respondents rely primarily on the internet for their work and personal time. The entrepreneur respondent relies heavily on internet for their business, commuting journey and personal time. Eight respondents who live outside the city centre of Antwerp use their mobile phone for their commuting, such as entertainment, communication and purchasing public transport ticket.

On phase 2 interview, the respondents were two store owners in Antwerp city centre. The age of the respondents was 34 years-old and 50 years-old. Both respondents were living in other countries outside the European Union, which gave them a wider perspective in analysing the plant-based snack food category. One of the respondents lives in Antwerp city centre, while the other lives within 30-minutes journey from Antwerp city centre. Both respondents are familiar with smartphone usage on daily basis.

During the research process, the commissioning company offered an opportunity to use its retail intelligence as part of the analysis. Retail and marketing intelligence provide a more in-depth perspective from the consumers standpoint as to who the customers are, the factors which trigger their interest, the required information and the process by which the product is adopted.

The demographics of the stores traffic observed were not measured specifically, but there were psychological characteristics which are very crucial in building the insight. Store visitors were attracted to in-store signs and additional details available in-store, otherwise they would concentrate on familiar or popular products. Most of the store visitors did not indicate the use of shopping list. Compared to the visitors of regular grocery stores, the visitors of special category stores, such as organic store and sustainable food stores, display more curiosity on the commissioning company's products. They did not hesitate to explore further on the product details and how to further utilize the product(s).

4.2 Available Plant-based Snack Foods and Their Price Level in Antwerp, Belgium

Based on the interviews with the respondents, there was no recollection of particular brands or products on the top of the respondents' mind. One of the respondents had the recollection of an American brand. While one other respondent has no specific recollection on certain brand unless the wide category of all available brands in organic or ecological stores and mentioned "I don't know any specific brand that sells these kinds of plant-based snack, such as coconut chips for example. Perhaps in the special store, they have these kinds of plant-based snack, like in bio store.".

When observing the retail channels of the commissioning company, the available plant-based snack products are commercial potato chips, crackers, dried whole-size vegetables, dehydrated vegetables or fruit chips, cereal mixture (muesli or granola mixture), raw or less processed confectionery (for example cacao nibs and chocolate bars), vegan cookies and jam.

From the point of view of the store owners, the consumers decision to consume the plant-based snack foods is primarily based on the idea to contribute to preserve the environment. With this in mind, the store owners pointed out that consumers do not necessarily limit the selection to plant-based only, but there are consumers who prefer vegetarian or vegan products based on their diet. However, this driving factor is considered to be the current trends, particularly for the urban consumers.

One of the store owners stated that the food products in their store are all slow-food or organic food with farm to fork concept designed to support local businesses. Especially with COVID-19 pandemic, both store owners are optimistic that the demand on plant-based snack foods and sustainable foods will increase. According to one of the store owners, the pandemic has a silver lining by mentioning "Yes, it will increase. Especially after COVID-19, people will be aware what they eat, the environmental impact. They will be ready for a change. Possibly to change their mind, if they haven't. And this COVID-19 will confirm those whose mind already changed/awaken that this is a good choice."

Both store owners tend to partner with brands which have sustainable products. One of the store owners mentioned “We have three pillars, but please remember that we don't only have food, so all these vendors must have at least one of the three pillars. These pillars are (produced) local(ly), environmentally friendly or (supporting) social (responsibility). Doesn't have to be all three, but at least one of them.”

In terms of pricing, the initial price range of the commissioning company’s products was seen to be above the respondents accepted price for snack foods. Precisely up to 60% higher than the average market price. The same concern raised by the store owners and commissioning company’s retail partners when comparing the price range of their products to the competitors within the similar selection, size and certification.

Figure 5. Example of the competitors’ plant-based snack food in the retail channels

The overall reasonable price for plant-based snack food is estimated to be between €2 to €7, while market price may vary for different categories of plant-based snack foods. The price range for available chip products is between €0,69 to €2, the price range for available confectionery products is between €3,99 to €4,49, and the range of price for available mix-cereal products (for example granola and muesli-mixture) is between €2,99 to €6,15.

During the first phase of interview with the customers, the respondents suggested that the appropriate price range for plant-based snack food products to be between €1 to €5, despite the size and type of the products. The accepted price range for students is between €1 to €3, with a stretch to €4 to €5 for dehydrated fruit or vegetable products. At the same time, the respondents with source of income were willing to increase their price range from €5 to €7 for the dehydrated fruit or vegetable products.

After the first phase interview session with the customer, the initial research finding was updated to the commissioning company. After a thorough review on the situation and negotiation process with each product's owners on its clientele list, the commissioning company adjusted their range of pricing, which vary with each retail channel.

Since the Recommended Retail Price (RRP) was adjusted to be more competitive and affordable, more store owners welcomed the commissioning company's plant-based snack foods products in their stores.

Despite this price constraint by the respondents interviewed, store owners consider that the normal pricing of the sustainable food products to be higher than commercial brands in the same category. One of the examples was addressed by one of the store owners "I think it has to do with production as well. So, for example one of our food vendors from Italy. It was locally produced in Italy and it's helping the economy of the small villages in Italy. As you may know the problem in the Southern European countries, where small villages were left by the young people and therefore there's little to none, economic activities. So, the whole project is to bringing back the economy activities. And because of the project, this product is more expensive because she (the brand owner) wants to give a fair price to the people who make it and produce it. It's slow-food"

Albeit the consideration for higher pricing level of sustainable products, both store owners also discuss the proposed RRP with brand owners to suit their store visitors. One of the store owners mentioned "Of course there are many factors which play big roles, also that the people who are selling these products, they also have to have a small profit. Because otherwise you will not want to do it. So, we may have to look at that, for it (the price) to be reasonable."

Based on the retail intelligence of the commissioning company, plant-based snack foods are typically found in ecological stores and pop-up stores. The selections of plant-based snack foods in the regular grocery stores are known to be limited to existing commercial potato chips and starch-based chips.

Respondents addressed the limitation on plant-based snack food selections in the regular grocery store which would lead them to buy the available products selections. The respondents assumed a broader selection of plant-based snack foods would be available in the ecological store, premium grocery stores and Asian stores.

However, the respondents suggested that there is a higher likelihood of finding good quality plant-based snack foods in the ecological stores, pop-up stores and the premium grocery stores such as Delhaize, Jumbo and Lidl. Respondents shared their dissatisfaction at the variety of snacks in general in the affordable grocery store, such as Aldi, where they are likely to find low-quality snack foods, let alone plant-based snack foods.

Returning to the quality of the product, one of the store owners mentioned “If you can get the bio certification then it would be very good. Because it's a kind of quality that people do trust. Even if it is for fair trade.”

4.3 Consumer Standpoint in Antwerp On Plant-based Snack Foods

This section plays an essential role in drafting the thesis due to the reading of the underlying desires that the respondents wish to acquire or to accomplish through their snack habit, their snack selection and snack pattern.

Interest in the plant-based food category was motivated by an interest in seeking a healthier snack alternative, searching for a non-meat-based snack food alternative, contributing to the protection of the environment and finding the substitute snack alternatives to maintain weight.

One of the respondents mentioned “While consuming the snack, I can also do something good. I think that's the kind of world we're heading to. I think everyone just feel the urge of doing something good for the earth because of the necessity.”

However, based on an interview with two of the respondents and one of the store owners, some consumers do not separate food or snack food on the basis of the protein source due to the upbringing context growing up. They acknowledged that the term plant-based snack has only become popular in the last 20 years. Environmental concerns such as seeking alternative protein-based food and finding alternative renewable energy source out of plant-based were the driving force. The store owner mentioned “(I) Started noticing in development country, around 10 years ago, at the same time new way of looking at the economy. A big change. Especially in Africa (where) they have big youth market. In Kenya, around 20 years ago, there was already organic farming, and they were trying to push this product into the market, and it was just developing there. And there were already some people who are into organic farming and they were trying to get the products to the supermarket."

Respondent G mentioned "As you know from the discussion about the climate or the environment, the meat-based business has affecting the water in our environment as well. Whereas the plant farming can actually be done in a vertical farming solution. That's why I think the plant-based snack food can be a better idea. Because I'm quite concerned about the land usage for our business. Even though there are lots of regulations, but that doesn't always work to give us answers on how to do things right."

Similar idea was mentioned by respondent F "Plant-based snack foods should substitute meat-based food. Because there are lots of meat-based food and we have to bring it down a bit. It doesn't mean that everyone has to be vegetarian or vegan, but I think it's necessary right now to reduce the meat consumption."

When discussing about snacking habit, respondents associated snack activity with either a light meal in between main meals, a light meal while watching tv, a light meal to satisfy hunger when the situation prevents respondents from consuming main meal, as well as something unhealthy to reward oneself. Respondents with children at home will prepare snack for their children in between meals.

Respondent I mentioned "Depends on the mood. They are small and most of the time I see people eat them as well in between the meals. Like after breakfast, 2 hours later, when you want something but not too big, something small." While respondent C mentioned similar idea "When I'm hungry, something that i can enjoy on my sofa, or when I'm driving, and I haven't got proper meal then I will enjoy snack. Because I like to eat, and I like to try something else."

According to Peter Scholliers (2009, 56), the Belgians have an old word for snacking namely *vier uurtje. Vier uurtje* is the tradition of consuming snacks at 4 o'clock in the afternoon. Three of the respondents also identified their familiarity with *vier uurtje*. Scholliers (2009) noted that the *vier uurtje* customaries which no longer be carried by the younger generation, although some of the younger respondents between the ages of 19 and 25-year-old were still living with the legacy. (Scholliers, 2009, 56.)

Although there is no clear norm to decide how to consume snack, there is a certain period of time when customers either buy, consume or collect information on snack foods. Based on data from Instagram followers of the commissioning company, there is no specific dissimilarity between weekend and weekday patterns. Responses from interviews and in-store status showed similar evidence.

However, there are a variety of periods during the day that reflect consumer interest on snack foods, namely at the beginning of the day, in the afternoon and in the evening. The beginning of the day, between 8:00 am to 9:00 am, is considered as the best time to buy snack foods when some of the respondents are on their way to work or school.

Evening or the end of the day is considered the best time to consume snack foods. Notably, either after consuming main meal, enjoying family quality time or a light meal before heading to bed.

One respondent answered the question as to when does respondent consumes snack foods “When I watch TV or when I’m driving on the daytime and I haven’t eat(en) anything, so I snack and I can get some energy and concentrate more”, indicates that the younger generations is likely to switch traditional meals to all-day snacking. While the type of snacks can be represented by either chips, fruit, vegetables, nuts, confectionery and meat-based snack.

Two respondents described meat-based snack as one of the snack options, namely beef jerky, croque avain (bread toast with meat, jam and cheese) and toast cannibal (bread with chopped meat). One of the respondents mentioned that croque avain and toast cannibal were both popular in his day as a university student. The mentioned idea, however, was not addressed by the student respondents.

In-store retail intelligence did not clearly identify any deviation between consumer preferences in plant-based and meat-based snack foods. The response of the semi-structured interview confirmed this evidence. Respondents made a decision on the basis of preference when they had the urge to snack and the availability of snack in hands or in store. One of the respondents, as a vegetarian, explicitly narrowed the chosen snack category to plant-based snack foods.

However, the sales data of the commissioning company indicated higher interest on plant-based chips, followed by dehydrated fruit products. Demand for plant-based chips products shown by the regular monthly demand for re-stock from both consumers and retail partners of the commissioning company.

The interviewed store owners expressed their customers’ desire for plant-based snack food availability in their store. They foresee that demand will be higher in the future, particularly for customers who either live or commute to urban area.

Respondents with children at home and female younger interviewees prefer fresh fruit and vegetables for snack food alternatives. Respondents prefer healthy snack that has nutritional value that does not contain a chemical additive or a chemical preservative or sugar, particularly those with children who are still in the growth process.

When asked specifically for the plant-based snack foods, the respondents associated plant-based snack food to a healthy snack substitute made from fruit or vegetables that does not contain any artificial preservatives or additives (colour nor flavour). Three of the respondents attributed plant-based snack foods to raw vegetables or fruit, while five respondents indicated the method of the preparation could be in the form of vegetable or fruit chips.

In addition, plant-based snack foods related to the reputation of being a healthy option due to the standards of products containing either less sugar and salt or none at all, offer delicious flavours, different from the snack available in supermarket chain stores and ideally being less-processed or unprocessed during the production. It is also supposed to be prepared using a healthier method than deep frying, for instance by baking or dehydrating.

Eight of the respondents expected plant-based products to lack of any, or to have no chemical additives or preservatives. While four other of the respondents linked plant-based snack foods to alternative protein source, such as tofu, tempeh, bamboo, corn, soya, edamame or beans.

One respondent highlighted the importance of product information for the usage of words that are commonly known to consumers, in particular the breakdown of the ingredients of the products. Consumers in-store raised the same concern as they were at odds with either scientific name or foreign name of ingredients.

Respondent A mentioned “The cassava chip was nice too but I haven't seen the nutritional value, so I don't know how healthy it is. But some of the chips were nice, with combination of sweet and salty.”

The store owners emphasized the importance of the plant-based snack foods in their store to be associated to ecological, recycle practice and environmentally friendly. In one in-store occasion, one of the commissioning company’s retail partners addressed their concern on the usage of plastic as the packaging for plant-based snack foods. Despite the existence of recycling centre in Europe, the habit of separating and recycling waste does not immediately extend to people in the centre of Antwerp.

Three respondents expected plant-based snack food to be organic or to endorse fair trade. In the retail channels, the range of the plant-based snack foods contains both certified and non-certified organic or fair trade, which gives consumers a variety of choice, especially in terms of price. However, one of the interviewed store owners highlighted the demand on ecological products in their store, which was motivated by consumers concern about the current environmental issue.

The decision to consume plant-based snack foods considered by respondents predominantly for health benefit, healthier lifestyle and finding alternative protein-based snack foods for vegetarian and vegan diets. Seven respondents associated the health benefits of consuming plant-based snack foods nutritious, easy to digest or as easy as finding a psychological effect for ease of mind, such as consuming plant-based snack foods equal to consuming a healthier snack foods alternative.

Respondent F mentioned “While consuming the snack, I can also do something good. I think that's the kind of world we're heading to. I think everyone just feel the urge of doing something good for the earth because of the necessity.”

Despite the positive perception towards plant-based snack food, respondents noted the negative impact of current products in the market. The biggest concern was the negative impact on the environment. Not all available products on the market use sustainable or recyclable packaging material. One respondent pointed out that the use of non-environmentally friendly material, such as plastic, as packaging for a plant-based product contradicts the purpose of seeking an alternative to our food products.

Similar concerns were raised by the store owners to the list of brands of plant-based snack foods that are either available in their stores or ones that are interested in renting space in their stores. These brands offer products with packaging materials that are not environmentally friendly.

In addition to packaging material, the respondents were concerned about product sourcing, land usage, deforestation and social responsibility for the manufacture of the products. With the current industrial practice, horizontal farming has forced the government to open up more land for commercial purposes and leave less space to the forest ecosystem. With this in mind, younger interviewees and ecological store consumers have demonstrated approval and interest in products with ecological and fair-trade certification.

One respondent mentioned “I think that promoting fair trade can be a good marketing message for the consumer in here. People would love to buy when they know the producer get fair payment from the sold products. Then lots of people will buy it and won't mind paying more. Because right now people don't know if the producers get any fair payment.”

In addition, respondents addressed the lethal phenomenon of the combination between food overconsumption and modern-day industrial practice that drives higher demand on the market and indirectly raises the amount of production to be met by the producers.

Respondents constantly emphasized another potential negative effect of plant-based snack food which is the trace of a chemical additive or preservative on most of the available products on the market. One respondent mentioned “If there's artificial flavouring or chemical additive it might decrease my interest to taste or purchase the food. Unless it's very very tasty, perhaps I can consume it a bit. But that's rarely the occasion. I think most snack has these chemical additives. If I ever find snack products without chemical additive, then I'm willing to try. I will appreciate if the specify (and explain clearly) the chemical additive ingredients, but it will still prevent me from trying.”

Mother with children at home addressed the trace of chemical agents in plant-based snack foods as the key concern. The absence of non-chemical additive products is known to be a key factor in the growth of children. The same concern is expressed by respondents in the age group of 35+ years of age due to the harmful effects of the chemical additives on their body and on their health in general.

4.4 Influencing Factors in Decision Making Towards Plant-based Snack Food Consumption

During the first phase of interview, the respondents received a questionnaire consisting of two questions. The first query in the questionnaire concerns the main motivating factors in the decision-making process for plant-based snack foods.

Prior to testing the products, respondents investigated the detail information on the ingredients and nutritional value of each product. Followed by, giving a card to each respondent, with seven factors which may lead their decision making towards plant-based snack foods purchase and an empty row to be filled with other factors which come to their mind. Respondents then asked to rank the seven factors based on the importance for them prior to purchase plant-based snack foods. Interviewer and the interpreter then investigate the consideration behind their answers.

Based on the response of the respondents, packaging and price are considered to be key factors. Packaging includes packaging materials, design and size. Six respondents emphasized the ecological impact of the packaging material. One respondent referred to the major environmental effect of packaging material since the use of non-sustainable packaging material contributes to land-based waste. Respondent A mentioned “I think if you're promoting organic eco and sustainability then the packaging should definitely follow the same idea”

One of the respondents addressed a recommendation for the commissioning company to consider wasteless marketing approach where the offered product is stored and displayed as bulk, while they are sold on the basis of the customer’s need or desire. As mentioned by respondent F “Offer for a bulk buying using own tumbler, where you can refill the products from the store using own container. That is supporting the idea of being good for the planet. So, it gives sense to buyer that they are helping the earth.”

In the wasteless store concept, consumers are expected to bring their own container, either used jar or used tub when buying such items. The wasteless method of sale is considered to be in line with the goal of seeking an alternative to commercial snack foods.

Five other respondents highlighted the importance of packaging design for brand positioning and brand image. The packaging design with a combination of black background and one colour font is considered to position the brand at a premium level.

Whereas packaging design which offers clear and straight forward details on the ingredients and the use or the benefits of the products, is viewed to be a trusted brand.

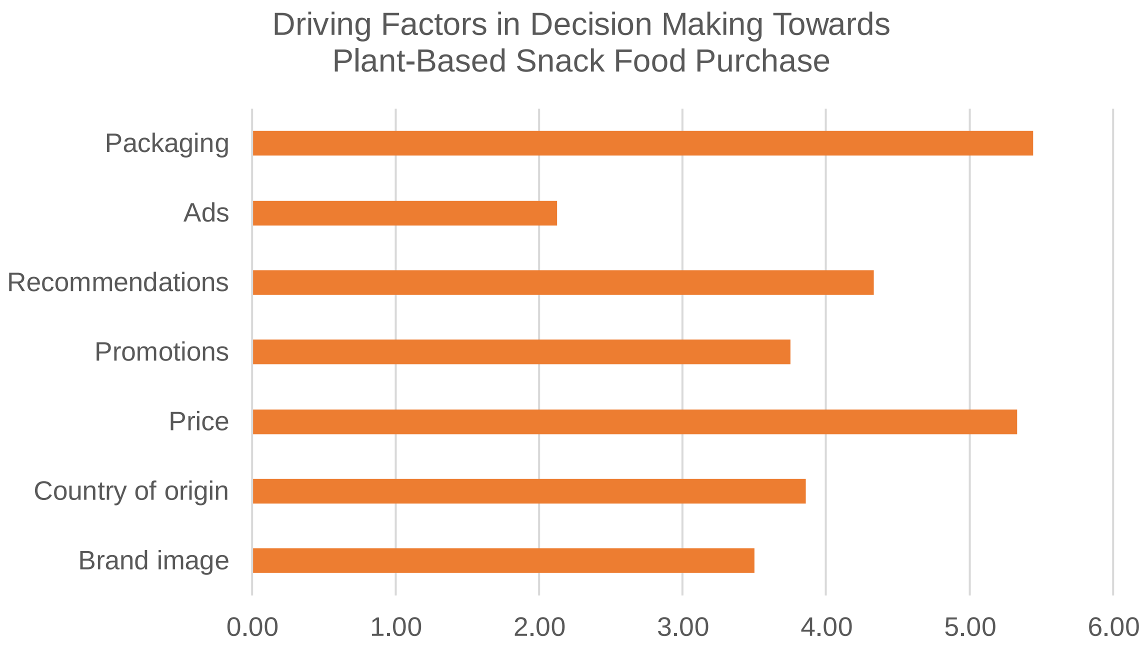


Figure 6. Driving factors in decision making towards plant-based snack food purchase (n=9)

At the same time, respondents and in-store consumers also did not respond positively to the packaging design of one of the Indonesian plant-based snack food products in terms of colour and design elements. The particular brand displayed the combination of bright colour palette, alongside with unproportionally images and text. This particular design certainly captures consumers attention, despite the unease impact on the consumers.

One of the respondents mentioned “The too colourful lanting (cassava cracker) is too suspicious but the calm colour packaging lanting (cassava cracker) is ok. The too colourful packaging feels like screaming buy me buy me otherwise I'm not getting sold.” The consumers give benefit of the doubt considering the typical colour appreciation by Indonesian market, nevertheless the Belgian consumers might prefer a different kind of design, as mentioned by one of the respondents “But knowing that Indonesia appreciates colour, perhaps that can change the perception. If it has too many things on the packaging, then I will not buy it.”

One respondent recommended the possibility of customizing the packaging for each customer. Coca-Cola is one of the popular packaging customisation practices where the consumer can buy the product with their name written on the packaging instead of the brand name. However, it is worth to questioning whether the advantages of personalized packaging outweigh the sustainability objective. As the respondents have frequently emphasized, environment protection is the main factor in decision-making on plant-based snack foods.

At the same time, one of the respondents suggested that the packaging design should be able to capture the good taste of the products. By using semantic feature comparison model, the packaging design has the role to translate the impact to one sense (taste) through another sense (vision). This method has been widely applied by popular food and beverage brands. The respondents provided an example of one of popular commercial chip brands featuring potatoes and steaks or potatoes and bell peppers on the product packaging to establish a taste association.

One respondent pointed out the uniqueness of each product's design packaging to be necessary. A brand with packaging design that mimics the popular brand in the same category, gives the impression of a reproduction of the popular brand. In this case, the second brand is considered to have a lower quality and thus needs to imitate the design of the famous brand, which also commonly known as a scam. The said respondent mentioned "I will buy snickers but if it's fake brand of snicker then I will not buy it just because it says it taste similar to snicker."

In addition to the factors listed above, the size of the packaging should also be evaluated. Three of the respondents preferred each product to be of proportional size compared to the competitors. Two respondents compared the size of the packaging to the price of the product, while another respondent found the size of the packaging to contribute to the in-store visibility of the product.

The marketing manager of the commissioning company addressed the concern of its store visitors regarding the size of the Indonesian plant-based products compared to prices, in particular the category of dried fruit. "The most frequent question for me was the sizing and the pricing. It is actually one of our concerns as well, the product manufacturers refused to reconsider their pricing despite the feedback from the market. I personally think this can be a potential issue to continuously distributing these products in Antwerp, let alone Belgium or other EU countries."

In addition to the design, four respondents addressed the importance of knowing the benefits of the raw ingredients for plant-based chips. For example, in the case of cassava chips, consumers demand more detail on the comparison between cassava to potatoes and sweet potatoes. Another example is the distinction between dehydrated coconut with spices and the existing dehydrated coconut without any spice.

Respondent A mentioned lightly “I do like the taste of these cassava chips and crackers, they are very tasty. But as a consumer, I don’t see the difference between cassava and potatoes. I guess you guys should mentioned the difference between those two.”

While respondent B mentioned “I would expect more descriptive information about the plant, which was used to prepare the product itself, why use that plant, what's the difference compared to regular snacks. Something to show the type of plants. Take example of Lays chips, they use colour and visual at the front side of the packaging (with images of bell pepper, potatoes, beef, etc). I still don't think that's quite representative as it's too simple.”

Price was perceived to be one of the main factors in decision-making on the purchasing of plant-based snack foods. Five respondents highlighted the importance of the pricing, for example where they were in a store and there was a special discount or promo in-store, they would be drawn to buy a product in this category. The pricing issues were overwhelmingly raised by respondents who are students.

A recommendation from peers or family or influential figure will be the next key factor. Popularity and buzz on social media are considered to be a recommendation as well. Three respondents found peer recommendation to be more reliable than the product information provided by the brand. One of the said respondents mentioned that the presence of information on the product by the brand should be accessible to customers as required. Bear in mind that pushing the information to the consumers may lead them away.

Recommendation and (in-store) promotion factors are mutually supporting each other. (In-store) Promotion in this case is associated by the retail activities in-store, such as sampling activities, special offer, exclusive sales and display banner on shelves, among many other things. According to five respondents, if all factors are fulfilled, they are more likely purchase the products without further consideration. One respondent mentioned that if both factors are met, the price factor would be surpassed.

Based on the observation on the visitors of the retail channels, sampling activities were deemed essential. By handing out product sample, visitors were able to associate the flavour of the products to the taste which is familiar to them. One of the cases in-store was the cassava chips sold by the commissioning company. Visitors often equate the flavour and the texture of cassava chips that are similar to regular potato chips.

Respondent E mentioned “I thought about that too, there should be sampling available in the store. Sampling sometimes get you (to like it). If someone call me to try it, I like it and I will try it.”

That being said, in-store sampling also requires an effective and efficient strategy to avoid aggravating store visitors. Respondent D mentioned “Sampling is needed. If someone call me to try it and then yeah of course I will try it. Otherwise just put a sign with text "TRY ME". But not "TRY ME! IT'S FREE" because then it's like screaming buy me buy me. When I'm thinking of sampling, it can be on the plate where I don't have to open it.”

While similar concern was mentioned by another respondent “If there's sample in the shop, I will try it. The it will get me. Then I think I shouldn't do this, but I do this. You have to make sure people knows that the sampling is free. But not when someone call me "hey it's free you can try it" then I will no no. But if it's standing there and it's obviously free, then I will try it. Maybe because I feel the pressure to buy it if there's someone ask me. It's like if I'm taking something for free, I have to give back by buying it even if I'm not really convinced.”

Based on the commissioning company’s observation in its retail partners’ stores, visitors appear to buy the products when there was sampling for the visitors. The marketing manager mentioned “I think it’s important for us to hand out tester again. So far, people were asking about our products, but they rarely purchase when there is no tester. When we handed out tester, our sales number improved. But the COVID situation is very tricky, we have to find a better way to hand out our products testing. I think when we do sampling, we have to prepare an individual or a small packaging to be taken home by the store visitors.”

The presence of (in-store) promotion has become a stopping power for the customer. Two respondents referred to (in-store) promotion as one of the fastest ways to drawn them to buy a plant-based snack food product. The respondents suggested that (in-store) promotion could increase the likelihood of brand visibility in competition especially in the snack category.

One respondent addressed the domino effect from sampling “And in the shop I think people should try it. If they like the taste they will try it again. If it's on a promotion or discount, then it can be interesting. Tester is important for a new product. not everyone wants to try new product, for example my colleagues. Sometimes it can also be because of too many products in the grocery stores. People don't know what to choose and don't have time to decide.”

The marketing manager of the commissioning company added that one of the benefits of in-store promotion is the opportunity to have a conversation with customers, “When we have our people by the products, people are more likely asked about our products and we are able to explain to them what is the benefit of our products. Actually, this is one of my favourite things to do in-store, because I can talk to the store visitors. A lot of time we got new information on what trigger their interest in our products or what other questions they have about our products. And this information is important, because then we can build our marketing material or retail strategy based on this.”

In addition to (in-store) promotion, country of origin and brand image were considered to be more relevant than advertising. Respondents emphasized the importance of country of origin. The distance between the country of the buyer and the country of the seller brings more negative impacts on the environment. The said respondents considered distance to be a key factor in the contribution of carbon footprint to the supply chain process, despite the method of fulfilment.

One of the respondents mentioned “Always look at the country of origin, so you know from how far it comes. Counting the logistic. I don't buy much snacks myself, but I always look at the country of origin, like from New Zealand, then I won't buy it. Even though I really like it. I will just buy some apple from Belgium.”

On the contrary, one respondent suggested that popularity of the brand in this matter could outweigh the distance factor. Precisely on the premise that a popular international brand would transport the products in mass quantity to satisfy the demand, which would result in a lower carbon footprint for each package of the product. This aspect is considered to bring peace of mind to respondents and consumers, since they would have less personal carbon footprint from the consumption of said plant-based snack foods.

Respondent A mentioned “I think recommendation is important. Because the more other people explore this product as well, it means the impact is bigger because many people buy it. So, if more people buy this product, and they have to fly the product for lots of people that would be better than just fly this product solely for me.”

Respondents highlighted nutritional value, taste, environmental impact, health benefits and novelty as other supporting factors in decision-making for plant-based snack foods. Seven respondents expected plant-based snack food to be healthier than traditional snack foods. The healthier concept can be defined as measuring the calories per serving, nutritional value and traces of chemical additives.

Three respondents talked about the importance of the product’s taste. Most of existing plant-based snack foods have very mild flavour or no flavour at all. The respondents expected the taste of the product to differ from the regular snack due to the absence or the lack of the chemical additive. They were however, looking forward to plant-based snack food choices that could offer stronger flavours.

In terms of accessibility, respondents highlighted the importance of availability in the regular grocery or convenience store. The accessibility aspect was related to the purchase journey of snack category in general. Eight respondents were less likely to schedule their snack purchase as it was merely considered an impulsive purchase or a decision to satisfy urges on snacking. The respondents also noted that the time spent in decision-making on plant-based snack food products was rather short. They made the decision while they were at a store, not before the purchase itself.

Based on the discussion with the marketing manager, Indonesian plant-based snack foods are likely to be more popular and have more sales opportunities in the stores located in the city centre. The diversity of the people and the early influence of multi-cultural products and services in the city centre are opening up more doors for new international products to be welcomed on the market.

Other respondents raised similar questions while observing their peers and relatives in a smaller town with a less diverse population. Two respondents expressed their feedback on the lack of desire of their peers and relatives in experiencing a new product and their adherence to only purchase products that are available in local store. Residents in smaller cities were more hesitant to experience either new foreign products or new concept of foods without prior recommendation.

One of the respondents mentioned “In big city, people can have different opinion to support a cause or just to be open minded. A special store may still catch people attention. But in small city or region, people don't go to new store, they always go to the same store. In big city, it's still safe to promote it on the special stores.”

While respondent H added a similar idea to the recommendation “Recommendation is important, if my family or people say it's really good (then I will try it), especially for people who don't understand those kinds of brand (recommendation can be very helpful).”

When addressing the impulsiveness of purchasing snacks, four respondents mentioned that they plan their visit to the grocery store and therefore plan their snack purchase before visiting the store. Two of these respondents are employees and the other two are mothers with children. The employees considered planning to buy their snack food products to suit their working schedule.

While according to mothers with children, the value of planning before purchasing any snack foods lies in the initial research on the ingredients of the product, the traces of chemical agents on the product, the organic certification and the budget. It is essential for mothers to understand what their family consumes.

Despite being a generation of the internet, the concept of buying plant-based snack foods or food in general is not yet considered to be the main choice to purchase. Some of the respondents considered purchasing food after tasting the product and assessing the physical appearance of the products. One of the respondents is optimistic that the commissioning company will be able to sell its products online, given that online purchases are fairly popular to Belgian consumers.

The second questions on the questionnaire consisted of the preference of the respondents for the price range of plant-based snack foods. Each respondent received a card containing the categories of products and was asked to provide a maximum reasonable price for each category.

The majority of the respondents expected that plant-based chips would be sold between €1 and €2, while the price range for dehydrated fruits or vegetables would be sold between €3 and €4. It is fair to assume that respondents gave the benefit of the doubts about dehydrated fruits and vegetables due to the lack of the chemical agents.

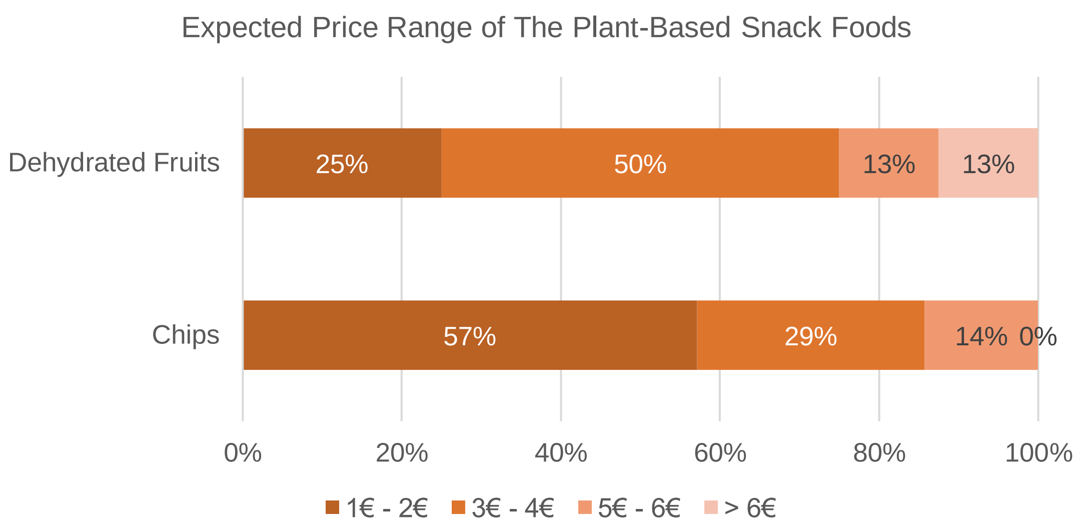


Figure 7. Expected price range of the plant-based snack food purchase (n=9)

Respondent C mentioned “Price is least important if I like the product. It's not like I'm going to give it to someone else. Even if it's a little big expensive, but probably the frequency can be lower than snack with lower price. Unless it's very very expensive. Price however can't be too high, or much higher than other products (competitors). People may switch to other brands, even though they like your products. You can be a bit higher pricing than normal chips but not too high. Perhaps a bag of 200gr (potato) chips costs €4 and you should go by €5. But if you sell by €6 then people won't buy it because they can get 2 packaging from other brands (€3) and people consume snack a lot.”

After ranking the pricing for dehydrated fruits and chips, the respondents were asked to give feedback on several Indonesian plant-based snack foods sold in the pop-up store. The tested products consisted of cassava crackers, cassava chips, dehydrated pineapple, dehydrated mango strips and coconut chips. Please refer to Appendix 8 to find the products evaluated by the respondents.

In general, respondents viewed the tested plant-based snack foods as healthier than traditional potato chips available on the market. Furthermore, as the products tested came with resealable packaging, the respondents appreciated the feature as it allowed them to enjoy one packaging of the snack several times.

Respondents demonstrated their interest in the unique flavours and unique texture of the cassava chips and cassava crackers. Respondents compared the flavours of the products tested with the flavours of the existing products on the market or with any familiar flavours they have had before. In this case, the respondents compafred the texture of the cassava chips with the existing commercial cassava chips on the market.

“Similar with my home country food, the salted egg tastes like cheese in Serbia. It's salty enough, you have the taste and I can view myself eat this in front of the tv. If I have nuts and this, I prefer this one. Because I don't find this kind of flavour here in Belgium.”

Respondents appreciated the new flavours and texture of cassava crackers with the combination of Indonesian spices and dried kaffir lime sprinkled on crackers. The presence of the kaffir lime in the cassava crackers mixture initially perplexed the respondents and was considered to be inedible. After being informed that the kaffir lime was edible, the respondents described the kaffir lime as blending well with the cassava crackers mixture.

Despite appreciation of the texture and taste, the respondents were curious to find the nutritional value of cassava in comparison to the potato. Regardless, based on the sales data from the pop-up store, it is worth noting that 70% of the cassava crackers were sold in the first two months of the Pop-Up store. The cassava crackers were recorded as the only product category sold out throughout the pop-up store period, while the remaining product categories were later distributed to other retail channels.

As stated earlier in section 4.4, the product packaging of the cassava crackers A did not receive positive feedback from the respondents. On the other hand, the product packaging of cassava crackers B received more positive feedback due to the calm colour of the pantone.

In addition to the category of crackers and chips, the respondents also gave positive feedback to dehydrated fruit. Compared to the existing coconut food products in the market mainly consist of oil, grated dried coconut and dried coconut cubes, the dehydrated coconut chips were considered as unique because of the taste and the blend of spice.

Some of the respondents indicated that dehydrated coconut chips could be too spicy for Belgian consumers, while others did not mind the spicy flavour. The male respondents suggested to pair dehydrated coconut chips or the cassava chips with alcohol beverage to better approach broader Belgian consumers.

“The Coconut Flakes is a bit spicy but can be a good combination with sweet beer. A good combination of spices. An example where Asian people can do a lot with coconut. It never came up to my mind to spice up coconut chips.”
One of the respondents appreciated the dehydrated mango strips, which do not contain any additional sugar or chemical agents, while keeping the sweet flavour intact. “I like the mango. I don't know how they make it, but it tastes very special. So, the mango is really good.”

Both the dried pineapple and the dehydrated mango strips were considered good and could be healthy snack options for the respondents, particularly those with children. One of the respondents took advantage of the compact size of the dried pineapple and dehydrated mango strips packaging for people who drive. The compact size of the packaging allows the product to be kept close to the driver without necessarily intruding the focus and attention when driving.

5 Discussion

This chapter covers the iteration, followed by practical products recommendations, marketing activities and retail marketing recommendations for the commissioning company. In addition, this chapter will address the recommendation for further research to improve product supplies and further product testing.

5.1 Iteration

This sub-chapter summarizes the Jobs To Be Done as mentioned in section 2.5, in accordance with the main findings from the research result, to decide which jobs or desires consumers in Antwerp wish to do or obtain, as well as which features of Indonesian plant-based products are essential to perform these jobs or fulfil these desires. In order to explain when and where, this research used the Consumer Decision Journey (CDJ) theory to formulate a marketing strategy.

5.1.1 The Jobs to Be Done by the Indonesian Plant-based Snack Foods

The Jobs to Be Done can be summarized into three categories. The emotion jobs which are expected to make consumers feel a sense of achievement. The function jobs which stated goals to be achieved by the consumers. Lastly, the consumption jobs which define the steps to be done by the consumer when consuming the plant-based snack foods.

While at the same time, consumers expected innovations from the Indonesian plant-based products such as sustainable packaging materials, attractive and premium packaging, sensible packaging size compared to sizing, resealable packaging, elimination of carbon footprint from the logistic factor, elimination of product purchasing planning and easy accessibility.

Based on the summary in table 2, we can indicate that the communication message should cover these pointers:

- Light meal to satisfy hunger
- Good for health and good for the earth
- Represent high quality through packaging design

- Unique and acquired taste for consumers in Antwerp
- Can be purchased and consumed at anytime and anywhere

Table 2. Jobs To Be Done by potential consumers in Antwerp when consuming plant-based snack foods (theory model based on JTBD by Christensen et al.) (Klement 2016).

	Emotion	Consumption	Function
Jobs To Be Done	Psychological Feeling - "While consuming the snack, I can also do something good"	Further research - "Because right now people don't know if the producers get any fair payment. "	Accessible anytime - "Reseable packaging because normal chips don't have this"
	Guilt-free relationship with food - "I like snacks. Although I have to be a little bit careful because I can gain weight easily. But I like the taste."	Plan the purchase to bring own container - "But afterwards I will plan when to buy it and how many to buy. I normally buy as a supply. I like to have steady supply of snacks."	Unique or acquired taste - "If I have nuts and this, I prefer this one. Because I don't find this kind of flavour here in Belgium"
	Healthy Lifestyle - "I try to look more on plant-based snack foods for health reason, but not very hard"	Understand the nutrional value: - "the cassave chip was nice too but I haven't seen the nutritional value so I don't know how healthy it is."	Taste good - "That's the problem with most PBS, they don't give similar good taste like regular chips. that's important. I'm scared of the flavour."
		Preparation time for healthy snack - "Snack has to be something that is in the moment you want to enjoy it."	Social time - "But again i rarely snack, unless I'm with my friends and we pass the grocery store then we will buy the snack. So there's never really a specific moment."
			Satify hunger - "When I'm hungry, something that i can enjoy on my sofa, or when I'm driving and I haven't got proper meal then I will enjoy snack."
Innovation requirements	Packaging material - "Almost all of their pacakaging are not sustainable. They are all made of plastic. Cheap plastic. So I hope they can change that and make it bio-degradable."	Packaging design - "The too colorfull lanting is too suspicious but the calm color packaging lanting is ok. The too colorfull packaging feels like screaming buy me buy me otherwise I'm not getting sold."	Packaging size - "Size can be bigger. I think people in Europe are more used to bigger size packaging size and not the hard sturdy packaging material, more to the soft material packaging."
	Pricing - "However I think pricing wise is too high despite the size. For 6€ I would expect even bigger packaging size. "	Eliminate requrement to plan purchase - "No, it should be something that you can enjoy anytime you want it, without having to plan when to buy and bring your own container. That is just too much. "	Resealable packaging - "I'd love to see the pacakaging to be reseable."
	Eliminate carbon footprint from logistic - "So if more people buy this product, and they have to fly the product for lots of people that would be better than just fly this product solely for me."	Offer easy accessibility - "But in small city or region, people don't go to new store, they always go to the same store."	

5.1.2 The Consumer Decision Journey in Antwerp

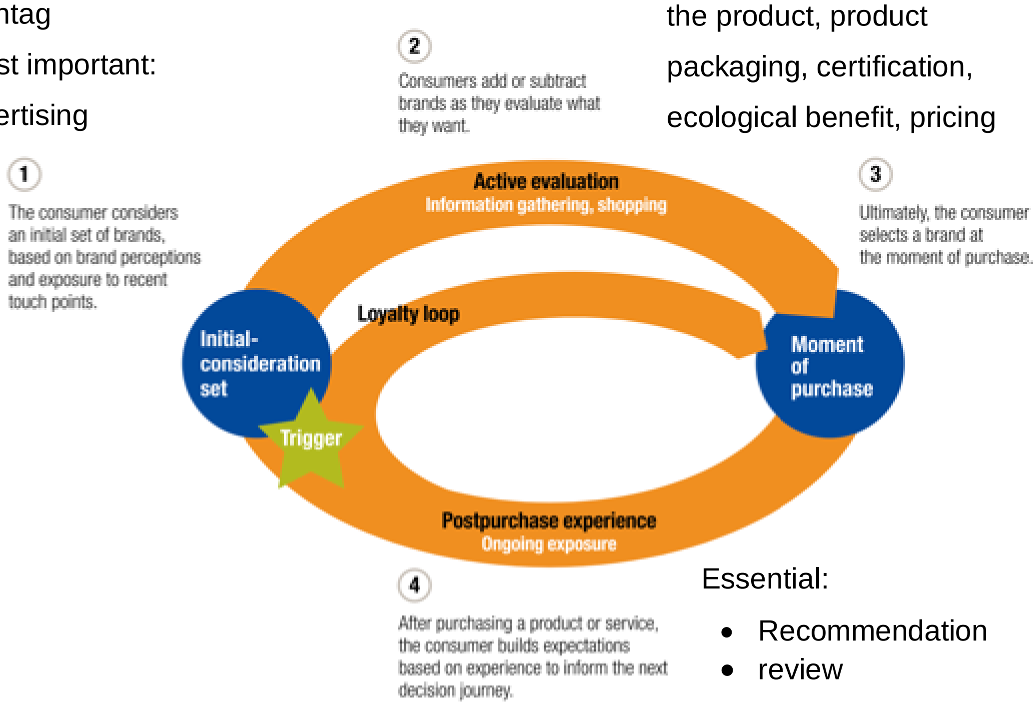
The consumer decision journey can be summarised as seen in Figure 17, in order to understand when the best time is and where to approach consumers in order to ensure that they are at the most receptive time to assimilate the communication message and convert it into buying and advocacy.

Essential:
Recommendation, accessible information (for example on website and own social media), hashtag
Least important: advertising

Essential:

- In-store branding
- Recommendation

Essential
In-store promo, in-store sampling, detail nutritional value and direct benefit of the product, product packaging, certification, ecological benefit, pricing



Essential:

- Recommendation
- review

Figure 8. The Consumer Decision Journey of potential consumers in Antwerp, Belgium (based on McKinsey CDJ model) (Court et al. 2009).

5.2 Recommendation for The Commissioning Company

After formulating the communication message and the Consumer Decision Journey in the iteration in section 5.2, this chapter will cover the recommendation for the commissioning company on the basis of the innovation(s) required to satisfy the unmet needs of the potential consumers in Antwerp, as well as formulation of marketing activities targeted at potential consumers in Antwerp.

5.2.1 Product Characteristics

The category of plant-based snack food is strongly connected to ecological issues and sustainability, as well as to consumer health benefits. It is therefore necessary for the commissioning company to ensure that the characteristic of its products overcome the environmental issue and provide consumers with nutritional value. At the same time, it aims at organic and fair-trade certification products.

Organic and fair-trade certification can be rather challenging for small-medium businesses in third countries, especially when their current raw ingredients are supplied through traditional farming method. A small-medium business entity is less likely to have the fund, the skill and the resources to afford the Fair-Trade certification. The alternative to enable small-medium businesses in acquiring the Fair-Trade certification is by joining the forces under one corporation or organisation. The commissioning company alongside with the Indonesia Chamber of Commerce may have the resources and funding to recruit these small-medium businesses under their wings.

Another alternative is to source raw ingredients from the sustainable farming method, such as vertical farming and urban farming. A study in 2017 revealed that the majority of the respondents of the study associated urban farming to give positive impact to the society. The three examples of word associations were healthy, organic and helping and supporting local economy. (Grebitus, Printezis & Printezis 2017, 194.) Recently, urban farming has pushed the Indonesian young generation back to the farming business. Agricultural support 14% of Indonesian GDP, the urban farming method is therefore crucial to push the young generation to sustain the agricultural sector. (Ahluwalia 2018; Suparwoko 2016, 259.)

Vertical farming in Indonesia is applicable by choosing the combination of hydroponic and aquaponic farming method. The investment of starting commercial hydroponic farming may not be suitable for small-medium businesses, especially when they do not possess the skills nor the resources. The commissioning company has the opportunity to provide its product manufacturers with training and integration program to conduct urban farming and vertical farming. Another opportunity is to organise collaborations between urban farming organisations or vertical farming organisations and their product manufacturers.

Alongside to ecological products, consumers also looking forward to plant-based snack foods which provide nutritional benefit and bring positive impact to their healthy lifestyle. It is therefore essential to provide sufficient information about the product in the local language(s).

It is highly recommended for the commissioning company to make sure each product breakdown the nutritional value per packaging in the local language. Based on the European Union legislation, there is key information that is required to be presented to the consumers, namely: (European Commision 2020a.)

- Clearer and harmonised presentation of allergens
- Mandatory allergen information
- Information on the nutrition information
- List of engineered nanomaterials in the ingredients
- Specific information on the vegetable origin of refined oils and fats
- Indication of substitute ingredients for “imitation” food
- Improved legibility of information (minimum size of fonts)

The recommendation for product packaging will be further discussed in section 5.2.2. While the recommendation on promoting the nutritional value of the Indonesian plant-based snack foods can be considered to be infused in the communication message as discussed in section 5.2.3.

Alongside detailed product information, it is worth it for the commissioning company to find Indonesian plant-based snack foods which are prepared by using “oven-baked” cooking method, as well as prepared in a healthy oil alternative such as sunflower oils (Euromonitor International 2019).

5.2.2 Packaging Materials and Design

Product packaging variables affect the perceptions of the consumers on product positioning. The variables are colour, typographies, graphic form and images on the packaging design (Ampuero & Vila 2006, 103). These variables affect product positioning, prestige status, accessibility, quality, aesthetic and pricing (Ampuero & Vila 2006, 107).

Based on the research result, respondents and consumers expected the Indonesian plant-based snack foods to improve their product packaging in terms of material, colour pantone, design, information accessibility and size.

Due to the insufficient knowledge, skill and funding, changing product packaging will be challenging for the commissioning company's product manufacturers in Indonesia. Thus, it is recommended for the commissioning company to apply Branded House strategy for their brand architecture. Branded House strategy focuses on the effort to build brand reliability and brand awareness on one brand, which can be considered as a local brand

In Branded House strategy, the sub-brands are all marketed and promoted under the umbrella of the parent brand. One of the exemplary examples would be Virgin and its sub-brands, such as Virgin Airlines, Virgin Express, Virgin Rail and Virgin Music amongst many other things. (Aaker & Erich 2000.)

The first step in designing new product packaging of the Indonesian plant-based snack foods will be to acknowledge the cultural difference between Indonesian market and Belgian market. The commissioning company may refer to the Trompenaars seven dimensions of culture to consider cross-cultural design to approach the Belgian market, without eliminating the authenticity of Indonesian value of the products.

According to the seven dimensions of Trompenaars, different culture has different approach on each dimension. For example: while Indonesian culture embraces particularism, communitarianism and synchronous time culture, the Belgian market culture embraces universalism, individualism and sequential time culture. (Trompenaars & Hampden – Turner 2012.)

By considering the cross-cultural design method, design process should consider these factors: (Vieira 2020.)

- Language and dialect usage: this factor will affect typography in the design as well, for example: text expansion factor where a phrase may have different length in Indonesian and Dutch
- Culturally appropriate image: for example, showing an image of certain religious attribute may not be acceptable widely in Belgian market

- Icon usage: different icon may have been perceived differently in different culture. For example, the magnifying glass is associated widely as “search” symbol, nevertheless the Indian market associates the image of “magnifying glass” with a ping pong paddle
- The impact of colour psychology: to use colour as stimuli of physical, physiological and psychological to influence effect, cognitive, action and psychological state (Elliot et al. 2018).
- Mental models: in UX design, “users will approach new products and features based on what they’ve used before” (Benson 2020).
- Varying attitude towards religion, gender and clothes

The second factor in design process would be to consider proportional in the design of the product packaging, specifically by using the concept of the golden section proportion. The large part of visual design is the principle of geometric composition, which historically was based on the cognitive proportion preferences, for example with the use of golden section rectangle or golden section proportion. (Kimberly 2001, 6.) The power of the golden section proportion is to create harmony on the pattern between each element (Kimberly 2001, 8).

The third factor of the packaging design would be the product detail information in the local language(s). Based on the research study, product information of each product is expected to deliver the direct benefit of the product and the raw ingredients of the product and state the nutritional benefit and value of the product.

Moving to the material of the product packaging, the commissioning company may consider applying both sustainable packaging and wasteless selling method. The commissioning company may have to negotiate a wasteless selling model in the partners’ stores or in owned pop-up store, for example by using scoop bins or in-store refill station to store the plant-based chips and cracker products where customers are able to scoop the products out of the bin as much as they need.

The commissioning company may explore the opportunity of switching to sustainable packaging as well. The research on the sustainable packaging material is actively developed in Indonesia, for example with the wide development of biodegradable and compostable plastics from cassava, seaweed plastics materials, chicken feather keratin, fish skin waste and seaweed mix, corn skin waste and bioplastic from coffee skin waste (Magic Green 2020; Mongabay 2020; Kiswanto, et al. 2012; Berita IPB 2019; Rini 2017; Safitra & Herlina 2020).

There are as well other alternative sustainable materials developed in Europe. For example, a Finnish start-up company, Sulapac is replacing plastic material with wood products (such as wood chips) and plant-based hanger (Sulapac 2020).

The commissioning company may consider educating its foods manufacturers to standardize the size of the product packaging to the standard size of product packaging in Belgium or in Europe. Alternatively, the size of the product packaging can be divided into single packaging (small volume) and sharing pack (big volume).

5.2.3 Marketing Activities

Despite the study result suggest that advertisement is the least important factor in decision making towards plant-based snack foods purchase, there are expectations for information to be available at any time needed and there is power of recommendation which can be triggered through marketing activities.

Before moving forward with an advertising campaign, the commissioning company should develop the message for its brand. To compose the communication message, the commissioning company may refer to The Job To Be Done discussion on section 5.1.1 where the Indonesian plant-based snack foods is able to provide the service to do the jobs which consumers aim to achieve or acquire.

The suggested message for the brand is recommended to cover the new flavour and the new texture of the premium plant-based snack foods with exceptional design, the function of the Indonesian plant-based snack foods as a light meal or easy bites between meals, the association between the Indonesian plant-based snack to familiar taste for the Belgian consumers, healthy yet tasty plant-based snack foods, health benefit of cassava, nutritional value of plant-based snack foods, defying the myth of snacking as bad habit, preserving the environment and alternative snack for children or family.

A suggestion for the communication message could be: “Guilt-free tasty snack, healthy for you and the earth!” Another example of the campaign message composition could be “Healthy + binge-watching + snack + to save the world”. Afterwards, the campaign message should be administered in all campaign materials to ensure all materials are consistent, in terms of look, feel and overall message.

To understand when and where the audience is in the most receptive moment, the recommendation was built based on the Consumer Decision Journey (CDJ) model as shown in figure 8 in section 5.1.2. The CDJ divided consumer's journey into 3 main phases, the Initial Consideration Phase, Active Evaluation and Moment of Purchase Phase, and lastly, the Post Purchase Experience Phase.

Based on the CDJ diagram, this research study was able to recommend a media campaign for each phase of the consumer journey towards plant-based snack foods as shown on table 3. It is recommended to separate the campaign message between thematic which contains message highlighting the products, and tactical which emphasize promotional activities, for example discount, bonus, package and bulk buy amongst many other.

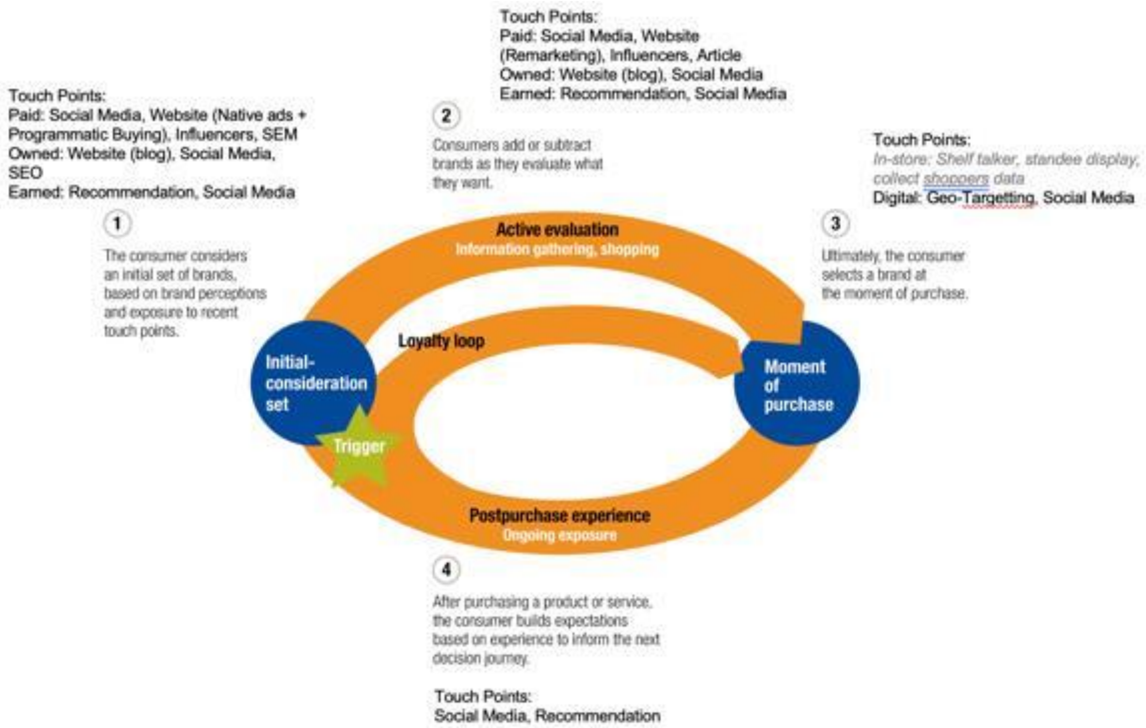


Figure 9. The Consumer Decision Journey of potential consumers in Antwerp, Belgium (based on McKinsey CDJ model) (Court et al. 2009).

A thematic campaign which emphasizes the communication message, and the product features is recommended to be activated during the initial consideration phase and post-purchase experience phase to create brand awareness. While during the active evaluation phase, a tactical campaign functioned as the enticement to churn audience into consumer.

During the initial consideration phase, the commissioning company is advisable to localise its website to cater both B2B and B2C consumers. At the same time, to approach the potential target audience, the commissioning company should consider reviewing the following media channels to promote its brand and plant-based snack foods: Search Engine Optimisation (SEO), social media advertising, Search Engine Marketing (SEM), native advertising, programmatic buying or Google Display Network (GDN) and Influencer Marketing as shown on table 3.

Table 3. Media channels recommendation

Type	Detail	KPI	Tools / Channels	Initial Consideration Phase	Active Evaluation Phase	Post Purchase Experience Phase
Google Search	SEM, SEO	• Click to website • Click to Action (direction to stores)	Google Analytics Google Adwords	• Brand level • Thematic	• Brand level • Tactical	• Brand level • Thematic
Content Marketing	Website (Blog)	• Engagement Rate • Click to action (direction to stores) • Click to website	Facebook & instagram	Thematic	• Thematic • Tactical	Thematic
	Native Ads					
	Organic SOME Post					
	Promoted SOME Post					
	Influencer Marketing				• Thematic • Tactical	
	Review				Thematic	
	Promoted SOME Re-marketing				Tactical	Thematic
Display Ad	Playable Ads	Cost Per Million (CPM)	• Programmatic Buying • Google Display Network	Thematic	Tactical	

Considering Search Engine is the most essential marketing activities, a campaign to support a search result should be carried on throughout the three phases. Search result and website are two beans in a pod, which have to be done simultaneously and continuously. The function of supporting search result and website is to drive traffic to website while at the same time reaching as many potential audiences as possible (depending on budget).

Paid social media channels and display advertisement have the function to reach as many potential audiences as possible. By applying geo-targeting to target potential audience in the stores' neighbourhoods, as well as psychographic, to build brand awareness and brand recall. At the same time, to educate potential audience without hard selling, influencer marketing and native advertising should be considered. Native advertising is the type of ads where it looks like organic content written by a journalist or press (Smith 2017).

During the active evaluation phase, it is essential to acknowledge consumers effort to compare one brand to another. The number of exercised brands might be expanded as consumers try to find the best product to deliver what consumers desire. While both phases might be separated in most industries, the journey of snack categories might happen simultaneously when consumers are at the store.

Seeing that pricing is considered as one of the important key factors in decision making towards plant-based snack foods, to win the competition at this stage, a tactical campaign which offers discounts or bundles offers bigger chances to drive consumers to purchase the product. At the same time, the goal of display ads and the social media on this stage is to drive audiences to the store to take up the in-store promo. While at the same time, retail marketing will drive attract visitors' attention to the Indonesian plant-based snack food products. The recommended strategy for retail marketing will be discussed in section 5.2.4.

During the post-purchase experience phase, the essential focus should be resonating the experience of purchasing and consuming the products. Positive experience made purchasers loyal to the brand and turned into word-of-mouth recommendation. The post-purchase experience shapes audience's opinion for every subsequent decision in the category.

In general, there are three types of consumers, namely the promoters (those who promotes the brand), the passives (those who are neutral) and the detractors (who will less likely endorse the brand). By approaching the promoters to give positive feedback on each social media channel, the commissioning company has the advantage of having organic reviews.

Rewards as big discount and prizes may trigger the promoters to voice their positive experiences to other people. Since nowadays consumers believe the advocacy of the strangers rather than influencers or celebrities. Nevertheless, not all purchasers are active advocates of either the brand or the products. (Court et al. 2009.) Therefore, it is recommended to the commissioning company to trigger the domino effect from the positive purchase experiences.

The two biggest advocates during this phase would be the purchasers with positive experiences and the influencers. While there might be purchasers with negative experiences, the commissioning company can turn the negative experiences into positive experiences through customer relationship management, to provide the solution to the problem of the purchasers.

According to Young Entrepreneur Council there are 7 ways to turn the negative experiences into a positive one, namely by fast responding to the consumers' complaints and active listening, while reflecting, validate and empathize with their situation. These steps are essential to make consumers understand that they are heard and important to the brand. (Young Entrepreneur Council 2019.)

5.2.4 Retail Marketing

Retail branding affects multi-sensory when consumers finding the products in-store and can enhance consumer experiences to impact their equity (Ailawadi & Keller 2004, 2).

Information is essential when customers deciding to purchase, and attractive and effective display will deliver the information. Based on an article by Méndez-Suaréz & Monford (2020, 259) offline advertising such as TV advertising and store flyers do have positive impact to store sales, although this impact is considered to be lowered on webstore sales.

Respondents and retail consumers considered retail activities such as product sampling, special offers, discounts and in-store branding to be powerful in influencing decision making. In-store sampling is considered as one of the effective marketing activities in pushing sales numbers. In-store sampling encourages consumers to try on the products, while pushing impulse buying and influence future purchase. On top of that, in-store activities will improve the shopping experience of the customer, while at the same time will build awareness to the traffic of the store. (Lawson et al. 1990; Phillips et al. 2015.)

During COVID-19 pandemic, sampling activities are not allowed to limit the spread of the virus. However, without sampling, consumers are less confident to purchase the products. One of the alternatives of sampling is to provide individual sampling package to be taken home for the customers in-store. The commissioning company, however, has to consider the usage of sustainable packaging for the individual sampling package.

Aside from sampling activities, in-store branding is also an essential part of the retail marketing. There are several key performance indicators to be considered in the future, namely:

- Combining physical location and ecommerce to drive traffic to ecommerce,
- enhance consumer experiences where physical location acts as both store and station for consumers when they need to contact the commissioning company,
- consumer advocates and market research which enable the commissioning company is able to collect further insight directly from the consumers during their visit to the physical store,

- drive more sales through in-store only promotion,
- and brand visibility through in-store branding.

5.2.5 Recommendation for Further Research

The first and most significant further research is retail data analytics. Shoppers' data are considered essential to gather insight as customers buy the products. The benefits of retail data analytics are to gather historical insights from the certain store(s), where the findings can be adopted by both consumers and employees in the form of effectiveness, productivity and shopping experiences, as well as by retailers and suppliers in the form of on-time delivery, market share, profit, revenue and time to market amongst many other things (Shankar et al. 2020, 10).

The simplest way to collect shoppers' data is by starting a conversation as what has been done at moment. However, during COVID-19 pandemic time, brands are wisely advised to support social distancing. Thus, the commissioning company may explore the usage of creative shoppers' data collection method, for example by using tablet in-store to provide information and gather insight from the stores' visitors.

One case study from Sephora make-up brand which collected shoppers' data in one of its branches by using an in-store tablet. The tablet itself delivers quizzes for the stores' visitors to find suitable products. (Nicasio 2019.)

The commissioning company may consider conducting further research into the application of cross-cultural design to be integrated into the design of new product packaging. Further research should also explore consumers feedback on the new product packaging design through Focus Group Discussion (FGD) and which design elements should be considered for design of premium product packaging. The commissioning company will be able to associate its brand as a premium line up with this detail.

Moving forward, by collaborating with the Indonesian Chamber of Commerce, the commissioning company may consider further research to develop sustainable packaging materials, as well as the ecological impacts of the new sustainable material(s). With this information, the commissioning company will be able to claim its effort in preserving the environment and therefore, creating additional value for the brand and the products.

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Appendices

Appendix 1. Semi-structured Interview Guidance in English

Date & day : Wednesday / 16.10.2019
Time : 11.00 – 18.00
Place : Antoon Van Dijk Brasserie, Antwerp, Belgium

Grouping & session:

Time	Duration	No of Participants	General criteria
11.00 – 11.30	30 minutes *For each group*	5 persons *For each group*	The pop-up store visitors who are interested to join the discussion
12.00 – 12.30			
16.00 – 16.30			
17.00 – 17.30			
Other time (by appointment)			

QUESTIONS

Structure:

- Introduction
- Interest on plant-based snack foods
- Feedback on the product
- Feedback on the packaging
- Purchase journey
- Competition

INTRODUCTION

The research is designed to understand Belgian consumers attitude towards plant-based snack foods, which factors influence the purchase decision, what other brands are available at the moment, and how do they rate the attractiveness of Indonesian plant-based snack foods.

Introduction I: 5 minutes Total: 5 minutes Objective: ice break and introduce the purpose of the research	- Introduce market research and explain briefly the purpose of interaction - Assure ‘there is no right or wrong answer’ - Explain audiotaping/ video/ photograph (just for reporting purpose) - Switch off handphones - Invite respondents to introduce themselves - Moderator creates a friendly, informal, reassuring atmosphere - Moderator introduce themselves: Monika + Safira **INTRODUCTION AND WARM UP** - Can you tell me a little bit about yourself? Name, Age, Occupation? - Why are you interested in plant-based snack foods? » *explore background reason / ideology of plant-based food consumption*

Section 1
 	
S1: 15 minutes
Total: 20 minutes
 	
Objective: Understand consumers' attitude towards plant-based category
	General Understanding of Plant-based snack foods (PBSF)
	Let's move to our topic today on plant-based snack foods. We will play a game; I will mention a word and I need you to tell me all that comes to your mind when hearing this word…
	
	- When I say the word "snack" what comes to your mind? What else words relate to snack? Why
	- Could you tell me on daily basis,
	  - When
	  - What
	  - and where do you consume snack?
	  - Which activities relates to the snack?
	» *draw a clock and probe when each meal is consumed, especially the snacking and plant-based food*
	
	Quick understanding on PBSF
	- What comes in your mind when you hear "plant-based snack foods"? Why?
	- What are the characteristics of PBSF?
	- Do you still remember the first time you were consuming PBSF? What made you try them?
	- How often?
	- What kind PBSF you have tried?
	- Which PBSF brand(s) are you consuming recently? Why do you choose these brands?
	- Is there any specific benefit from consuming PBSF?
	- Is there any specific harm from consuming PBSF?
	
	Interesting, now that we have discussed earlier about PBSF, I would like to know more about these…
	- Are there any consideration factors for choosing a certain PBSF?
	» *Bring cue cards with these categories + empty cards + pen*
	    o Brand image
	    o Country of origin
	    o Price
	    o Promotions

<table>
<tr>
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- o Recommendation: family, friend
- o Commercial: TVC, digital video, social media, etc.
- o Packaging

- If I ask you to rank it based on the most to least considered, how would it be? What are the factors that you would put at the top? Why is that so?
- And how about the factors that are least important? What are they? Why is that so?

<u>Purchase Habit</u>

- Where do you usually buy these products? Do you go to specific store? Or do you buy via online store?
- Is it a planned purchase or a spontaneous one?
- How much you buy per purchase? How about the price?
- Do you have certain consideration / expectation when purchasing PBSF? What are those?

» Bring issues on gluten-free, organic, fair trade, vegan, halal, etc

</td>
</tr>
<tr>
<td>

Section 2

S2: 10 minutjes
Total: 30 minutes

Objective:
Understand consumers' acceptance towards Indonesian PBSF packaging

</td>
<td>

Response to the Indonesian PBSF product packaging

Now, let's talk about what do you think about the products packaging

- How do you feel about the packaging? (Size, shape, color)
- What are your thoughts on the material of the packaging?
- How unique is the packaging?
- Are you able to recognize the brand of the product from the packaging?
- What do you think about the information (about the product) provided on the packaging?
- How do you imagine using this product based on the information on the packaging?
- Overall, how would you rate the quality of the packaging?

</td>
</tr>
</table>

	Bring issue on the environmentally friendly packaging, whether it is an expected important factor of the packaging. <u>IMPROVEMENT</u> - Do you have any suggestions to make this design more appealing and more relevant for you? What needs to be changed? - What if we give you a chance to make this design become better, what would you do? Why?
Section 3 S2: 5 minutjes Total: 35 minutes Objective: consumers' feedback on the Indonesian PBSF product	**Understand feedback on the product** <u>Indonesian PBSF</u> - What are the things you like about this product? » one by one - What are the things you would like to improve from this product? » one by one *Bring issue on the flavor component, how important it is for the consumers?*
Section 4 S4: 2 minutes	**Cool off & thank you** It's been a wonderful and fruitful discussion we had today. Now that we have discussed thoroughly on PBSF category, do you have anything to add on? Or is there anything you would like to ask? … Thank you for your participation and engagement in the discussion. Your valuable insights are going to help us in the development process of our products in the future.

Appendix 2. Semi-structured Interview Guidance in Dutch

Datum & dag	: Woensdag/ 16.10.2019
Tijd	: 11.00 – 18.00
Plaats	: Antoon Van Dijk Brasserie, Antwerp, Belgium

Groepen & regelingen:

Time	Duratie	Nummer van personen in een groep	Algemene criteria
11.00 – 11.30	30 minutjes *Voor elk groep*	5 personen *Voor elk groep*	De gaast op de pop-up store die akkoord gaan om de onderhandelingen te nemen
12.00 – 12.30			
16.00 – 16.30			
17.00 – 17.30			
Kies liever op andere tijd.. (kontakten bij email)			

Opstelling/ structuur:

- Invoering
- Betreffen op groenten snack
- Terugkoppeling op de producten
- Terugkoppeling op de verpakking
- Aankoopproces
- Competitie

INVOERING

Wij willen bestuderen: wat de Belgen van Indonesische groenten snack vinden, welke factoren hun keuzes beïnvloeden, wat is het aankoopproces voor de groenten snack, welke andere producten er zijn in de markt, en hoe je de aantrekkelijkheid van Indonesische groenten snack schat

Invoering I: 5 minutes Totaal: 5 minutes Doelstelling: ijsbreker en presenteer de doelstelling van het onderzoek	- Presenteer het onderzoek en verklaar kort de doelstelling van het onderzoek - Verzeker dat er geen “correct” of “verkeerd” antwoord is - Leg uit dat de sessie wordt opgenomen bij audiotaping en videotaping (voor het rapporteren) - Zet de mobile uit - Nodig de respondenten uit om hun zelf voor te stellen - Creëren een vriendelijke of toevallig atmosfeer - Presenteer de moderateurs: Monika + Safira **INTRODUCTIE AND IJSBREKER** - Kunt u uwzelf voorstellen? Naam, leeftijd, beroep? - Waarom bent u geïnteresseerd zijn op plant gebaseerde snack? »*Verklaar de reden, achtergrond, ideologische voor consumptie van de plant gebaseerde snack* » als het niet belangrijk is, vraag maar: waarom ben je interessant zijn op de studie van plant gebaseerde snack
Deel 1 S1: 15 minutjes Totaal: 20 minutjes Doelstelling: Begrijp de houding van de consument ten opzichte van een op plant gebaseerde categorie	**Algemene begrip aan plant gebaseerde snack** Nu, zullen we doorgaan met ons volgend onderwerp: plant gebaseerde snack? Zullen we een spel spellen? Ik zal een woord zeggen en u moet een paar woorden zeggen die u denkt wanneer u het woord hoort. - Aan welk woord denkt u wanneer ik het woord “snack” zeg? - Aan welke andere woorden denkt u? Waarom? - Kunt u uitleggen: - Wanneer? - Wat of welke snack? - Waar eet je die snack? - Op welke activiteiten? **Snel begrip op plant gebaseerde snack** - Aan welk woord denkt u wanneer ik het woord “plant gebaseerde snack” zeg? Aan welke andere woorden denkt u? Waarom? - Wat zijn de kenmerken van plant gebaseerde snack?

- Herinner u nog wanneer u eerste plant gebaseerde snack gehad heb? Waarom had u plant gebaseerde snack?
- Hoe vaak eet u plant gebaseerde snack?
- Welke groenten snack hebt u ooit geproefd? Of, welke plant gebaseerde snack hebt u onlangs geproefd?
- Hebt u uw favoriete plant gebaseerde snack merk(en)? Waarom kiest u deze merk(en)?
- Wat is het voordeel van de plant gebaseerde snack dat u hebt geproefd?
- Is er specifieke schade door het consumeren van plant gebaseerde snack?

Interessant, nu wil ik nog bepaalde dingen weten

- Zijn er bepaalde factoren die uw keuze van plant gebaseerde snack beïnvloedt?
    - Het beeld van het merk
    - Oorspronkelijk land
    - Prijs
    - Promoties
    - Recommandatie: familie, vriend
    - Advertentie: TVC, digitale video, sociaal media
    - Verpakking
- Kunt u de groenten snack rangschikken van het meest tot het minst?
- Wat zijn de belangrijkste factoren? Waarom?
- Wat zijn de minst belangrijkste factoren? Waarom?

<u>Koop Gewonte</u>

- Waar koopt u de producten gewoonlijk? Gaat u naar specifieke winkel? Of koopt u het online?
- Is het een gepland aankoop of is het spontaan gekozen?
- Hoeveel snacks koopt u per aankoop? Hoeveel kost het?
- Heb u bepaalde overwegingen of verwachtingen wanneer u groenten snack koopt? Wat zijn die?

Deel 3 S2: 5 minutjes Total: 35 minutes Doelstelling: Feedback van Belgische consumenten over het Indonesische plant gebaseerde snack	**Begrijp feedback aan de produkten** <u>Indonesische plant gebaseerde snack</u> - Wat vind je leuk aan dit product? - Wat zijn de dingen die u wilt verbeteren met dit product? *Breng een probleem met de smaakcomponent en verpakkingen, hoe belangrijk is het voor de consumenten?*
Deel 4 S4: 2 minutes	**Cool off & thank you** Het was een prachtige en vruchtbare discussie die we vandaag hadden. Nu dat we grondig hebben besproken over plant gebaseerde snack, Wilt u iets nog toevoegen? Of Hebt u een vraag? ... Bedankt voor uw deelname en betrokkenheid bij deze discussie. Uw waardevolle inzichten gaan ons helpen in het ontwikkelingsproces van onze producten in de toekomst.

Appendix 3. Semi-structured Interview Guidance With Store Owner in English

PLANT-BASED SNACK COMPETITIVE LANDSCAPE

Period : April 2020

Place : Online interview

Structure:

- Introduction
- Trends of plant-based snack foods and consumer behavior towards plant-based snack foods
- Store's requirements
- Competition

INTRODUCTION

The research is designed to understand Belgian consumers attitude towards plant-based snack foods, which factors influence the purchase decision and what other brands are available at the moment.

Introduction	*Before we start, please note:* • *There is no right or wrong answer* • *Our objective is to find the insight based on your experiences, knowledge and preferences* • *The interview result will be used for thesis publication and will be treated anonymously and confidentially according to GDPR without revealing any personal information which may reveal the identity of the respondent.* Hi, Can you tell me a little bit about yourself? • Name • Age • Occupation
Trends of Plant-based snack foods	We heard on numerous occasions that consumer nowadays is becoming more and more conscious to preserve the environment, therefore we'd like to see whether the trend translated as well to food consumption.

<table>
<tr><td></td><td>

Has there been demand (if not huge) for plant-based food in your store or in general?
If so, do you remember when was the first time you start noticing the demand from the consumer?
Has there been any demand for plant-based snack as well? In your opinion, which factors drive the demand?
In ballpark, how many percent of your sales generated by plant-based snacks?
Do you think the number of sales percentage generated by plant-based snacks will be bigger in the future? If so, when do you estimate or expect to see it?

</td></tr>
<tr><td>Store’s requirements</td><td>
Moving forward to the store’s requirement, we’d like to gain more insight on bellow factors:

when a new vendor proposes to sell new product of plant-based snacks, what are the factors which drive your decision?

– (ie. pricing, demand, country of origin, label, certification, etc)

Would you expect plant-based snack’s pricing to be the same or higher or lower than regular snack? If so, by how many percent?
Is there any certification that you would restrict plant-based snack vendors to oblige? Or is this optional for vendor?
Do you verify any certification from vendors? Or is there government agency which handles such issues?
Do you have any recommendation for new plant-based snack brand to approach your consumer better?

–
</td></tr>
<tr><td>Competition</td><td>
When discussing about the competitive landscape of plant-based snacks:

How many kinds of plant-based snack is available in your store? (types, vendors, country of origin)
How many foreign brands of plant-based snack is available in your store?
What is the top 5 most popular plant-based snack in your store? (types and brands)
What are their price range (RRP / consumer price)?

–
</td></tr>
<tr><td>Closing</td><td>
Thank you for helping us with the valuable insight. We believe your insight would be a tremendous help for our research project.

Do you have any additional comments for the plant-based snack competitive landscape?
</td></tr>
</table>

	We really appreciate having your time to help us with the discussion. Should you have any concern, kindly contact: Monika Audra Audra.alam@myy.haaga-helia.fi +358 413650026

Appendix 4. Semi-structured Interview Guidance With Store Owner in Dutch

PLANT-BASED SNACK COMPETITIVE LANDSCAPE

Period : April 2020

Place : Online interview

Structure:

- Introduction
- Trends of plant-based snack foods and consumer behavior towards plant-based snack foods
- Store's requirements
- Competition

INTRODUCTION

The research is designed to understand Belgian consumers attitude towards plant-based snack foods, which factors influence the purchase decision and what other brands are available at the moment.

<table>
<tr><td>Inleiding</td><td>Before we start, please note:
There is no right or wrong answer
Our objective is to find the insight based on your experiences, knowledge and preferences
The interview result will be used for thesis publication and will be treated anonymously and confidentially according to GDPR without revealing any personal information which may reveal the identity of the respondent.
Dag,
Kunt u uwzelf voorstellen?
Naam
Leeftijd
Beroep</td></tr>
<tr><td>Trends van plant-gebaseerde snacks</td><td>Wij hoorden bij talloze gelegenheden dat de consument tegenwoordig steeds bewuster wordt om het milieu te beschermen, daarom willen we graag zien of de trend zich ook vertaalt naar voedselconsumptie.</td></tr>
</table>

<table>
<tr><td></td><td>Is er vraag naar plant-gebaseerde snack in uw winkel of in het algemeen?
Weet u nog wanneer u voor het eerste keer de vraag van de consument opmerkte?
Is er ook vraag geweest naar plant-gebaseerde snack? Welke factoren drijven volgens u de vraag?
Hoeveel procent van uw omzet in marge wordt gegenereerd door plant-gebaseerde snacks?
Denk u dat het aantal % verkoop dat wordt gegenereerd door plant-gebaseerde snacks in de toekomst groter zal zijn? Zo ja, wanneer schat of verwacht u het te zien?</td></tr>
<tr><td>Eis v d winkel</td><td>Wanneer een nieuwe brand voorstelt oom een nieuwe product van plant-gebaseerde snack te verkopen, wat zijn de belangrijkste factoren voor u?
– (ie. prijs, oorspronkelijk land, consumenten eis, het beeld van het merk, verpakking, certificaat, enz.)
Zou u verwachten dat de prijzen van plant-gebaseerde snack gelijk of hoger of lager zijn dan van normale snacks? Zo ja, met hoeveel procent?
Is er een certificering die u zou beperken om brand van plant-gebaseerde snack te verplichten? Of is het optioneel?
Verifieert u enige certificering van de brand? Of is er een dienst die dergelijke kwesties behandeld?
Heeft u aanbevelingen voor een nieuw plant-gebaseerde snackmerk om uw consument beter te benaderen?</td></tr>
<tr><td>Wedstrijd</td><td>Hoeveel soorten plant-gebaseerde snack zijn er in uw winkel verkrijgbaar? (Typen, brand, oorspronkelijk land, enz.)
Hoeveel buitenlandse merken plant-gebaseerde snack zijn er in uw winkel verkrijgbaar?
Wat is de top 5 van het meest populaire plant-gebaseerde snacks in uw winkel? (soorten en merken)
Wat is hun prijsklasse (consumenten prijs)?</td></tr>
<tr><td>Einde</td><td>Bedankt voor uw helpen van ons met het waardevolle inzicht. We denken dat uw inzicht een enorme hulp zou zijn voor ons onderzoeksproject.

Heeft u nog aanvullende opmerkingen over het op plant gebaseerde snacks wedstrijd landschap?

We stellen uw hulp bij de discussie op prijs. Mocht u zich zorgen maken, neem dan contact op met:
Monika Audra
Audra.alam@myy.haaga-helia.fi</td></tr>
</table>

Appendix 5. Invitation to SKYPE Interview With One of The Store Owners

Accepted: RE: Research invitation: The Belgian Consumer's Perceptio... @ Mon Jun 29, 2020 10am - 11am (CEST) (Alam Audra)

Google Calendar <calendar-notification@google.com>
on behalf of
[redacted]>
Thu 6/25/2020 4:26 PM
To: Alam Audra [redacted]

1 attachments (9 KB)
invite.ics;

[redacted] **has accepted this invitation.**

RE: Research invitation: The Belgian Consumer's Perception Towards Plant-based Snack Foods

When	Mon Jun 29, 2020 10am – 11am Central European Time - Brussels
Calendar	Alam Audra
Who	• Alam Audra - organizer • [redacted]

Dear [redacted]

Thank you for the response.

Just a quick update from today's conversation with [redacted], the skype meeting will take place on next Monday (29.06) 10AM BE time.

Kindly find the information on the SKYPE ID:

* [redacted]
* [redacted]

Thank you.

Best Regards,
Monika

From [redacted]
Sent: Tuesday, June 23, 2020 7:55:00 AM
To: Alam Audra
Subject: Re: Research invitation: The Belgian Consumer's Perception Towards Plant-based Snack Foods

Dear Alam,

We can schedule a meeting this friday at 18u.

Kind regards,
[redacted]

On Mon, Jun 22, 2020 at 10:39 PM Alam Audra > wrote:
Dear [redacted]

Thank you for the feedback.
Should you feel more comfortable to answer via the word document, kindly find enclosed the question list for the interview.

If you otherwise prefer to schedule an interview, I would be more than happy to follow your available schedule.

Thank you again for taking some time with my email.

Best Regards,

Audra Alam (Monika)

Group: GLOB18S2B

[redacted]

From: [redacted]>
Sent: Sunday, June 21, 2020 2:41 PM
To: Alam Audra >
Subject: Re: Research invitation: The Belgian Consumer's Perception Towards Plant-based Snack Foods

yes, that will work better

[redacted]

On Wed, Jun 17, 2020 at 10:10 AM Alam Audra > wrote:
Hi [redacted]

This is Monika again; I have your email from [redacted] and a week ago, I addressed an email invitation to you to join a qualitative research regarding the Belgian consumer.

I would like to have your confirmation if you are available to join the qualitative research about the perception of Belgian consumers towards Plant-based foods. Your expertise as [redacted] owner will be a valuable insight for me to collect the pieces of the puzzle.

Considering [redacted] has actively been opened again and you might be occupied, if you feel like participating the interview by sharing the insights through the attached word document, that would be valuable as well. Otherwise, if you feel like it would be easier to give direct answers, I would be more than happy to setup a SKYPE interview.

Looking forward to hearing from you.

Best Regards,

Audra Alam (Monika)

Group: GLOB18S2B

[redacted]

From: Alam Audra
Sent: Monday, June 8, 2020 12:37 PM
To: [redacted]
Subject: Research invitation: The Belgian Consumer's Perception Towards Plant-based Snack Foods

Dear [redacted]

My name is Monika and I got your email from [redacted]
I'm one of the partners o[redacted] and currently I'm conducting a research on the Belgian consumers' perception towards plant-based snack food.

The research will be used as part of my thesis writing and for [redacted] development in the near future. Considering your expertise with [redacted] and its customers, it would be very valuable to have your opinion on the research topic.

A short summary on the research itself:

The research is developed using qualitative research method by collecting insights from both Belgian consumers and Belgian store owners.
The objective of the research is to find the strategy / recommendation for a plant-based snack food brand to penetrate Belgian market, based on the perspective of the Belgian consumers towards plant-based snack food, the competition in the market and the influenced factors.

The research process and data analysis are closely monitored by Haaga Helia University, Finland. When the thesis is finalized and has passed the verification process, it will be published publicly on theseus.com. Kindly acknowledge that all research data will be treated confidentially and anonymously, according to GDPR. Any information shared or written on the thesis shall not reveal any personal information of the respondents.

If you are available and open to participate on the research, I would like to invite you for a SKYPE interview within this week. The online interview will take 60 minutes.
Enclosed you will find the question-guideline to the semi-structured interview.
Should you prefer to fill in the question-guideline, that would also help my research process.

Thank you for spending some time to read my email and I'm looking forward to hearing your feedback.
If you have any concern or further questions, feel free to let me know.

Best Regards,

Audra Alam (Monika)

Group: GLOB18S2B

[redacted]

....

Join online meeting

Find a local number

Forgot your dial-in PIN?

[http://www.haaga-helia.fi/sites/all/themes/haagahelia/images/logo.png]

If you experience problems with your meeting. Contact Haaga-Helia helpdesk (helpdesk (at) haaga-helia.fi) for further assistance.

....

Appendix 6. The Indonesian Pop-up Store From October 2019 To January 2020

The commissioning company's Pop Up Store in Antwerp city center (in Stadsfeestzaal – atrium)

Appendix 7. Adhyata's Setup in Retail Channels

Carrefour Borgerhout
Turnhoutsebaan 222
2140 Antwerp

BorGerHub
Turnhoutse-
baan 92
2140 Antwerp

Unit 25
Steenhou-
wersvest 25
Antwerp

The commissioning company's setup in retail channels in Antwerp city center

Appendix 8. The Indonesian Plant-based Snacks Tested During Research Phase 1

Cassava cracker A

Cassava cracker B

Cassava chips

Coconut Chips

Dehydrated pineapple

Dehydrated mango

Indonesian plant-based snack food products which were being tested in the semi-structure interviews

Appendix 9. The Invitation To Interview Phase 1

Online invitation to the semi-structure interview session delivered via email and whatsapp message.