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A dining experience typology of Middle of the Pyramid (MOP) consumers in Gauteng

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Abstract

The purpose of this article was to describe the process followed to segment middle of the pyramid consumers (MOP) according to their dining experience needs and influencing variables when dining out at different restaurants. Both qualitative and quantitative methods were used in the study as data were collected from 18 interviews and 363 participants selected from full-service restaurants in Gauteng province. Exploratory and confirmatory factor analysis revealed eight dining factors: restaurant health, service, accessibility, food, atmosphere, layout, food health and social. Non-hierarchical cluster analysis using the K-means clustering procedure was used to segment MOP consumers according to their dining needs. The results suggested three types of segments, namely *Young family diners, Time saver diners* and *Experience seeker diners*. Each segment was profiled according to three variables: demographics, influencing factors (reason for dining, dining companion and choice of restaurant) and eight dining experience factors. The relationship between these three variables differed between the three segments. This research indicated dining experience needs of MOP consumer segments. The contribution of this study is unique in that it is the first investigation of the dining needs of MOP consumers and the factors that are important to these consumers when choosing a dining experience in the context of different types of restaurant.

Keywords: dining behaviour, restaurant selection, segmentation, middle of the pyramid consumers (MOP)

Introduction

Marketers apply segmentation to group consumers by dividing a broad target group into clearly identifiable subsets of consumers who have common needs, wants or demands and who will respond in virtually the same way based on a particular marketing mix" (Cant & Van Heerden, 2013:76). In this process of market targeting, a company (in this case the hospitality industry) positions itself to ensure effective competition as a leader in the market (Schiffman, O'Cass, Paladino & Carlson, 2013:487), and ultimately also "superior financial performance" (Bruwer, Roediger & Herbst, 2017:5). In the case of hospitality service, market segmentation is an important technique particularly for the restaurant industry in distinguishing between products and services for different types of consumers (Cant, Brink & Brijball, 2009:16) and has been acknowledged as a suitable tool to assist in developing restaurant management strategies (Kim, Choe & Lee, 2016:2311). Even though it is beneficial to identify target segments, South African market segmentation in the restaurant industry, especially dining behaviour, is a relatively neglected area (Kruger & Saayman, 2016:336). Restaurants tend to focus on the changing needs of consumers in the competitive dining environment to ensure high levels of service (Pizam, Shapoval & Ellis, 2016). Understanding consumer behaviour patterns is therefore of utmost importance, as the service industry needs to know when to "intervene in the process of managing marketing activities to obtain the results they want" (Horner & Swarbrooke, 2016:1). Given the scarcity of research on the middle of the pyramid (MOP) diner, the purpose of this paper is to segment middle of the pyramid consumers according to their dining experience needs and influencing variables when dining out at different restaurants. This would allow the restaurant industry to narrow down their target market at a particular time with a specific product or service. The restaurant industry could thus offer a variety of dining experiences to sub-segments of the MOP market. An example is when a partner treats a special person with an intimate dining experience to celebrate an occasion such as a birthday or Valentine's date. On other occassions an achievement in the family could be the reason to enjoy a dining experience in a larger group.

Literature review

Segmenting the dining experience

The South African dining industry is extremely competitive and therefore restaurateurs have to consider and adapt to the dining needs of consumers in order to sustain and grow in this service industry (Petzer & Mackay, 2014:2). Accordingly, the modern consumer tends to have a larger range of products and services based on value to choose from. Restaurant diners thus have a broader range of options in their selection of restaurant segments (Ha & Jang, 2013:384). The South African food and beverage industry is growing positively and contributed 7.7% to the GDP between 2014 and 2015 (Statistics-Sa, 2015a). Dining out is no longer reserved for special occasions, but plays an essential role in everyday life (Roberson, 2014:3). This tendency is observed mostly in developed countries and among high-income households (Moolman, 2011:131). Pizam *et al.* (2016:4) noted that quality is not only an indicator of competitive advantage, but markets and consumers also pay attention to the value that a product or service offers. This increases the need for restaurants to segment the dining experience into different restaurant segments and to determine differences in dining behaviour (Kruger & Saayman, 2016:336).

According to Duhigg (2013), consumer behaviour is "a powerful force with implications for restaurants. Not only brand will influence a change in their behaviour, but also the consumers' motivation for what they do". Therefore the evaluation of someone's dining experience is complex because it is not the result of a single variable, but rather a phenomenon that is influenced by several independent dimensions (Jensen & Hansen, 2007:623; Pantelidis, 2010:483). When dining out, consumers assess their overall experience not only on the basis of the quality of food and drink, but also according to certain dimensions such as the quality of service and the restaurant environment. The dining experience therefore consists of a combination of tangible and intangible quality dimensions (Kivits, Stierand & Wood, 2011:41). As the desire for food increases, consumers tend to "benchmark" any developing decision-making process with regard to dining according to their needs (biological, cultural and socio-psychological) relative to their knowledge of the availability and location of a restaurant (Kivits *et al.*, 2011:44).

As consumer needs become increasingly sophisticated, dining guests tend to want an extraordinary experience in a restaurant (Mhlanga, Moolman & Hattingh, 2013:112). To merely experience good quality food and an adequate level of service and ambience in a restaurant is acceptable to the average guest, but this is not enough for the guest that seeks a memorable (extraordinary) experience. An example of such an extraordinary dining experience is offered at Bientangs Cave (Restaurant and Wine Bar) in Hermanus where guests can enjoy birdlife, whale watching, and a view of the ocean whilst sampling some of

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the most exquisite and fresh signature seafood dishes not offered by any other seafood restaurant in the town.

Market research in the field of hospitality dates back to the 1980s. The first market segmentation for dining was published by Bahn and Granzin (1985). Segmentation for dining was done mostly on the basis of identifying dining experience dimensions and their use in selecting a restaurant. The choice of dimensions differs according to the restaurant and the intent of use (Kivela, 1997). Most of the studies (Brady & Cronin, 2001; Kim, Ng & Kim, 2009; Scarcelli, 2007; Terry & Israel, 2004) in the restaurant industry determine consumer buying behaviour in relation to consumer demographic variables, which include the consumers' age, gender, income, ethnicity, education and income level; age was noted as the most important and influential variable. It is imperative to understand the aspects of the dining experience and influencing variables on the choice of restaurant to ensure MOP consumer satisfaction and repeat business.

Middle of the pyramid market segment

There is a growing emerging market known as the middle of the pyramid (MOP) consumer segment that tends to attract researchers as a result of possible international trends with regard to new theoretical and practical contributions on the buying behaviour of this segment (African Development Bank, 2011). The rise of the MOP in Africa has resulted in new markets. Chickweche and Fletcher (2014:29) support other researchers that have addressed the influence of emerging markets, and note that they also refer to the South African "black middle class" consumer and "black diamonds" as the MOP (Kolk, Rivera-Santos & Rufin, 2014:338).

South Africa has gone through a series of changes since 1994 when Nelson Mandela became the first democratically elected president. In the period between 1998 and 2003, marked changes were identified in the distribution and composition of the population of the country (Ndanga, Louw & Van Rooyen, 2010:297). Political changes gave black people more access to jobs, finance, credit, entrepreneurial opportunities, homes and education. The "historically oppressed black majority" experienced economic freedom and were rewarded with economic opportunities that had been restricted during the years of "oppression and exploitation" under the apartheid regime (De Bruyn & Freathy, 2011:538; Goldberg, 2011:1). The boost in the size of the country's emerging MOP was achieved through the implementation of the Black Economic Empowerment (BEE) programme, the availability of credit and economic growth (Maumbe, 2012:148). In 2003 the South African government launched BEE as a racially selective programme to redress the inequalities of Apartheid by providing economic privileges to black (African, Coloureds, Indians and Chinese) South African citizens that are not available to White South African citizens.

The emerging MOP consumers have better education and employment opportunities and are increasing in numbers (Brulliard, 2010; Radebe, 2013).

The economic opportunities have resulted in black people earning higher income levels and subsequently showing growth in spending power. South Africa's MOP market segment has doubled in number and accounts for a third of the total consumption expenditure of the country (Venter, Chinomona & Chuchu, 2016:46). According to Writer (2016), the spending power of South African blacks trebled, while white spending remained the same over 12 years, compared to an increase in MOP spending power to 40% of South Africa's total spending power. MOP consumers are responsible for 67% of total black spending power, and about 40% of total consumer spending power in South Africa (Simpson & Ramogase, 2014).

MOPs are the most powerful market segment to have emerged during the last decade. They have emerged as the strongest consumer buying influence and have become a profitable investment opportunity for many retailers (Mashaba & Wiese, 2016:35). According to Ncube and Lufumpa (2014:1), MOP consumers have the ability to increase domestic consumption; contribute to increased growth of the private sector and entrepreneurs, and a better-structured and powerful public sector; assist in gender equity; and help overcome poverty. The movement of marketers to focus on more prosperous segments is seen in similar trends with respect to the emerging markets of developing countries, but the growing MOP segment is more composite due to the diversity of the market and its "cultural paradox" (Opperman, 2010:26). The MOP group is recognised by marketers as being big, largely on the basis of anecdotal evidence and myths, but little real understanding of the size and characteristics of the future market is available. (Goldberg, 2011:1).

The MOP segment has not been studied by many researchers, but is still seen as an "ever growing" group of consumers, and should be perceived as part of the African market that is still underestimated and sometimes overlooked by marketers. What is known, however, is that this emerging market is developing as one of the most important focus areas for the South African hospitality industry and is changing the very nature of the restaurant industry. This contributes to an increase in their dining-out behaviour (Chickweche & Fletcher, 2014:27). With the growth of the MOP segment and more focus on this important target market, it is clear that marketers can no longer adopt a one-size-fits-all approach towards this group. Marketers therefore need to adjust their strategies to meet the specific needs of South Africa's wealthy black consumers. Marketers and organisations need to set new marketing strategies in order to target the MOP segment. Customer dining needs must be aligned with specific dining experience dimensions such as the dining environment, level of service and food choice and food presentation. Only by achieving this can the buying behaviour of these consumers be understood and their needs addressed (Goldberg, 2011:2).

According to Mashaba and Wiese (2016:37), a number of researchers have tried to group MOP consumers from a South African perspective. The SAARF Universal Living Standards Measure (SU-LSM) was customised for South Africa and measures social class, or living standards, regardless of race, income or education. There are 10 SAARF LSM groups that assist in profiling consumers' wealth. (Visagie, 2013) confirms that MOP consumers tend to have an income of between R5 600 ($423) and R40 000 ($3 022) per month. The South African Research Foundation (SAARF) tried to segment the black middle class by combining demographics, psychographics and life stages. According to Du Plessis, Rousseau, Boshoff, Ehlers, Engelbrecht, Joubert and Sanders (2007:237), four segments of the MOP were identified from the SAARF LSM breakdown of consumer types, and these could be further divided into seven sub-segments. The segments are known as "young families", "start me ups", "mzansi" and "established" (Uct Unilever Institute of Stategic Marketing and Tns Research Surveys, 2007).

Various segmentation techniques have been used to segment South African consumers, but there has been very limited research focused on the MOP consumers' shopping behaviour (Mashaba & Wiese, 2016:40), and research is still lacking, particularly with respect to their leisure and consumption behaviour (Kruger & Saayman, 2014:1). Relatively few of the studies have assessed MOP consumption of more expensive services, however, even though the consumption of MOP consumers with respect to products has been under investigation since the mid-2000s (Lee & Hwang, 2011:658; Peng & Chen, 2015:180). Chen, Peng and Hung (2015:237) confirm a gap in the literature and the consequent need for more studies on consumption behaviour with respect to novel services (and also intangible factors), as well as the factors that influence MOP behaviour.

Previous studies on the MOP market potential of the domestic South African market are currently limited. Studies have been done in fields such as wine consumption (Du Toit, 2011; Foxcroft, 2009:1; Ndanga *et al.*, 2010:293; Ngwako and Ndanga, 2007; Opperman, 2010:1; Van Rooyen, Esterhuizen and Vink, 2008), consumer/buying behaviour (Bevan-Dye, Garnett and De Klerk, 2012:5578; Chickweche and Fletcher, 2014:27; Goldberg and Jansen Van

Rensburg, 2013:362; Potgieter, Wiese and Strasheim, 2013:12), advertising (Johnson, 2013:11) and other business industries (Evans and Chemaly, 2007; Goldberg, 2011:2; Mcgibbon, 2008; Moodley, 2008:1; Rivero, Du Toit & Kotze, 2003:6; Van Loggerenberg, 2009:1). The knowledge of consumers' dining experience has thus not been addressed and deserves attention (Moolman, 2011:129; Petzer & Mackay, 2014:1). The findings of this research have implications for the restaurant industry, because the MOP customer segment requires a unique marketing mix for their dining experience that restaurateurs could use to benchmark them in the globally competitive hospitality market.

Methodology

The consumer is part of the dining experience and the context in which the experience takes place (Gerdes, Stringam & Brookshire, 2008:218). The research was done in two stages, a qualitative phase and a quantitative phase. In the qualitative phase, the respondents were interviewed (n=18) on how they view a dining experience. As the quantitative phase was exploratory in nature, the findings and information from the literature analysis and the interviews were used in designing the questionnaires. As mentioned by Abdelhamied (2011:6), there is a growing trend to use both qualitative and quantitative methodologies to develop a more complete understanding of the source of information.

Sample and data collection

The sample frame consisted of MOP consumers in Gauteng. Although Gauteng is South Africa's smallest province in terms of geographical area, it is the most densely populated, and has the largest population (13.2 million) (Statistics-Sa, 2015b). Gauteng also has the largest buying power, with 46% of the population being MOPs that enjoy dining out as part of their lifestyle (Martins, 2012; Radebe, 2013).

A questionnaire was developed to gather information on the MOP consumers' needs and choice of dining experience dimensions. After the pilot testing, the final questionnaire was completed and ready for distribution. Due to the rapid expansion of technological advancements, the questionnaires were distributed online, with a link to the Survey Monkey webpage, to employees at post levels 5 to 7 at the Tshwane University of Technology (TUT) according to their salary distribution, similar to the way in which other researchers have electronically administered their questionnaires (Pantelidis, 2010:484; Prasad & Demicco, 2009:7) for capturing the value of the dining experience, quality service and guest satisfaction in restaurants. Potgieter et al. (2013:19) previously used this online tool in the South African context to distinguish between MOP decision-making styles. After completing the questionnaire online, respondents were asked to forward the link to five friends that speak their home language and enjoy dining out outside the institution (snow ball technique). Ethical clearance was obtained from the Management Sciences Faculty Committee of Post Graduate Studies and the Research Central Ethics Committee at Tshwane University of Technology Ethical clearance was given for the research project – which is in essence only a part of the study.

Due to the poor online response, the researcher also approached consumers in identified full-service restaurants and coffee shops in the City of Johannesburg and City of Tshwane municipal areas. A total of 800 questionnaires were handed out, resulting in 363 responses that could be included in the study.

Measurement instrument and questionnaire design

Reviews of the literature, as well as the outcomes of the interviews were used in the design of the questionnaire. The process allowed the researcher to identify and narrow down the key factors that influence MOP consumers' choices relating to their dining experience. The

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respondents were required to complete three sections of the questionnaire. The first section focused on the demographic information and dining-out involvement of the respondents. In the second section, the respondents were required to indicate on a five-point scale (ranging from 'not at all important' to 'extremely important') the reasons for dining out and the variables that influence the choice of restaurant. In the last section of the questionnaire, the respondents were required to indicate on a six-point scale (ranging from 'not at all important' to 'extremely important') the importance of 50 items when selecting a restaurant for a dining experience.

Data analysis

Statistical analysis of the questionnaire data was performed using IBM SPSS (version 22). Exploratory factor analysis with Varimax rotation was used to assess how the selected measures loaded on the expected construct and assisted in determining the construct validity of the dining experience dimensions. The Cronbach's alpha coefficient was calculated to assess the reliability of the dining experience dimensions and to determine their internal consistency. The factors that influence MOP consumers' dining expectations according to their needs and demographics were analysed. The non-parametric Kruskal-Wallis analysis of variance (ANOVA) test was used to test for significant differences among the influencing factors. The SPSS Statistics Custom Table (t-test with Bonferroni correction) was used to compare means across columns to find any specific pairwise differences. Finally, to be able to determine possible relationships between the important dining experience dimensions and consumer needs and influencing factors, cross-tabulation was done. Non-hierarchical cluster analysis using the K-means clustering procedure was used to determine whether mean differences on the vector of the variables (needs, influencing factors and dining experience dimensions) among clusters were attributable to chance.

Results

Biographical information

The entire sample consisted of MOP respondents that liked dining and lived in Gauteng. Just over half (50.7%, n=184) of the sample consisted of respondents that were younger than 36 years. The smallest portion of the sample was in the 46–50 year age group (5.8%, n=21). Females (49.3%, n=179) and males (50.7%, n=184) were almost equally represented. More than 40% of the respondents were married, compared to just fewer than 30% who were single. The largest percentage of the respondents (73.8%, n=286) had children. The average monthly household incomes of the respondents were determined according to seven income levels. More than one quarter (27.5%, n=100) earned R10 000–R14 999 ($649-$974). The rest of the respondents were distributed across the other income groups, with the smallest proportion falling into the R25 000–R29 999 ($1 623-$1 948) and R30 000–R34 999 ($1 949-$2 273) income groups. Almost a fifth of the respondents (18.2%, n=66) spent R2 000 ($129) or more on dining out per month.

Factor and reliability analysis

To reduce the dimensionality of the total number of items and to examine patterns of correlations among questions, principal component factor analysis with Varimax rotation was used to analyse the 50 dining experience dimension items. The correlation matrix demonstrated a number of coefficients of 0.3 and above (Table 1).

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Table 1. Results of Kaiser-Meyer-Olkin Measure and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy		.888
Bartlett's Test of Sphericity	Approx. Chi-square	9192.431
	df	1128
	Sig.	.000

The overall Kaiser-Meyer-Olkin value was 0.812 with the original 50 items, and 0.888 with the 48 items used in the solution, which was well above the recommended minimum value of 0.6 (Kaiser, 1974:34). The Bartlett's Test of Sphericity (Bartlett, 1954:296) reached statistical significance, $p<.001$. The correlation matrix was thus deemed factorable.

Fifty items were initially subjected to principal component factor analysis. The factor loading of all the items indicated those items with values lower than 0.40 that were not interpretable for the study. Two of the variables did not load sufficiently on any of the components. These variables were excluded from the solution, and 48 items were retained. Only those items with a greater than one variance explained were retained. Composite factors were identified using factor loadings and factor scores for items loading on each factor. These composite factors served as the dependent variables in subsequent analysis for the study and should be interpreted taking into consideration the item content of each factor. The remaining 48 items resulted in an eight-component solution based on an Eigen value greater than 1.00 explaining 61.739% (before rotation) and 61.74% (after rotation) of the variation in the data. The communality of each variable was relatively high, ranging from 0.377 to 0.768.

Table 2. Reliability statistics for the eight extracted components (n=363)

Factors	**Description**	**No of items**	**Cronbach's alpha**	**Eigen value**	**% of variation**	
					Before rotation	**After rotation**
1	Service	9	0.921	12.249	25.519	12.562
2	Social	9	0.901	5.434	11.321	10.896
3	Food	8	0.829	3.249	6.769	8.976
4	Layout	6	0.866	2.317	4.827	8.441
5	Restaurant health	5	0.815	1.936	4.034	5.988
6	Atmosphere	3	0.807	1.628	3.392	5.118
7	Food health	4	0.693	1.547	3.280	4.995
8	Accessibility	4	0.714	1.246	2.597	4.764
Overall	**All dimensions**	**48**	**0.918**		***(61.739)***	***(61.74)***

The Cronbach's alpha coefficient yielded internal consistency reliability of at least 0.7 or higher (Table 2), which is appropriate (Pallant, 2010:6). The Cronbach's alpha coefficients ranged from 0.693 to 0.921 for the eight dining experience factors, all of which were significant at the alpha level of 0.1. Orthogonal rotation was done to minimise correlation between the factors and thus resulting in better interpretation after rotation. The final eight factors were *food, service, atmosphere, layout, social, food health, restaurant health* and *accessibility*.

Cluster analysis

Cluster analysis was used to establish whether distinguishing patterns exist among MOP consumers when dining out with respect to the factors that would influence their dining experience. The study revealed some differences in MOP consumer behaviour when selecting a restaurant for a dining experience. The data analyses displayed unique results that permit further discussion. Three dining experience profiles were noted. The basic behaviour resulted in three groups. These results support past research (Venter, 2010) on the influence of individual characteristics such as age, gender and income on consumer behaviour. One of the important findings and consequent interpretations of this study is that the reasons for dining out and the dining experience dimensions are both related to dining behaviour. The inter-relationship of the three dining profiles is shown in Table 3.

Table 3 Inter-relationship between dining variables and restaurant clusters (n=363)

Dining variables	**Restaurant clusters**		
	Segment 1 (Young family diners)	**Segment 2 (Time saver diners)**	**Segment 33 (Experience seeker diners)**
Age			
25–30	38 28.8	35 32.1	41 33.9
31–35	30 22.7	16 14.7	24 19.8
36–40	24 18.2	21 19.3	17 14.0
41–45	20 15.2	18 16.5	12 9.9
46–50	9 6.8	5 4.6	7 5.8
>50	11 8.3	14 12.8	20 16.5
Gender			
Male	69 52.3	51 46.8	58 47.9
Female	63 47.7	58 53.2	63 52.1
Income distribution			
R10 000– R14 999 ($974)	34 25.8	41 37.6	25 20.7
R15 000– R19 999 ($1 299)	17 12.9	16 14.7	22 18.2
R20 000– R24 999 ($1 623)	15 11.4	17 15.6	12 9.9
R25 000– R29 999 ($1 948)	9 6.8	10 9.2	11 9.1
R30 000– R34 999 ($2 273)	10 7.6	11 10.1	10 8.3

Dining variables	Restaurant clusters		
	Segment 1 (Young family diners)	**Segment 2 (Time saver diners)**	**Segment 33 (Experience seeker diners)**
R35 000– R50 000 ($3 247)	23 17.4	10 9.2	22 18.2
Above R50 000 ($3247)	24 18.2	4 3.7	19 15.7
Dining companion			
Less frequent family diners	22 16.7	59 54.1	45 37.2
More frequent family diners	90 68.2	28 25.7	57 47.1
More frequent non-family diners	20 15.2	22 20.2	19 15.7
Reasons for dining			
Social connectors	71 * 53.8 **	68 62.4	55 45.5
Relaxers	14 10.6	5 4.6	15 12.4
Convenience seekers	47 35.6	36 33.0	51 42.1
Dining experience dimensions			
Service	132 5.2008	109 5.1255	121 5.3162
Social	132 3.4240	109 3.5229	121 3.4169
Food	132 5.1671	109 4.9794	121 5.1240
Layout	132 4.7811	109 4.6413	121 4.6915
Restaurant health	132 5.2273	109 5.1523	121 5.3393
Atmosphere	132 4.7159	109 4.6758	121 4.8788
Food health	132 4.6231	109 4.2554	121 4.3636
Accessibility	132 5.2822	109 5.0023	121 5.1006

*n and % on biographical information, dining companion and reasons for dining out *.*
*n and mean score on dining experience dimensions ***

Each profile was named according to the main characteristics noted within the cluster:

Segment 1: Young family diners
The group comprises young respondents up to the age of 40 years. Looking at the group as a whole, the proportion of males that fall into the "young family" group is larger than the proportion of females that fall into that group. The respondents tend to have a monthly income of more than R35 000 ($2 274). They like to dine out more frequently and enjoy the experience

with their family. The group tends to visit any type of restaurant more frequently than the overall mean frequency. They like to go out to socialise and enjoy casual dining (in family restaurants, coffee shops and pub/club restaurants), which they seem to prefer more than convenience (fast-food and casual restaurants), elegant (upscale, fine-dining and hotel) or novelty restaurants. "Young family" diners have a high need for the dining experience dimensions of restaurant accessibility, restaurant health and service offered, while the social dining experience dimension was the least important.

Segment 2: Time saver diners
This group tends to fall into the 25–30 and 36–40 age groups. "Time savers" lean towards being female consumers. Respondents with an income of R10 000–R14 999 ($974) tend to be the largest "time savers". These diners like to eat out less frequently, but when dining out they enjoy sharing the experience with their family. The group visits any type of restaurant less frequently than the average for the group as a whole. Fast convenience restaurants (fast-food and casual restaurants and coffee shops) are more popular for socialising/bonding with other people. This group emphasises the importance of the restaurant health, service and accessibility dining experience dimensions, but all these dimensions had lower mean scores than for the other two groups. The mean score for the social dining experience dimension was the lowest of all three clusters.

Segment 3: Experience seeker diners
This group falls between the ages of 25 and 40, but there are also a number of respondents over the age of 50. However, more of the younger respondents fall into segment 3 than into segment 1. The proportion of females that fall into the "experience seekers" group is larger than the proportion of males that fall into this group. This group falls into the income groups of R15 000–R19 000 ($1 234) and R35 000–R50 000 ($3 247). These diners like to eat out frequently but less than segment 1, and enjoy sharing the experience with family. The group visits elegant (upscale and fine-dining restaurants) more often for both socialising and convenience reasons. Compared to the other segments, "experience seekers" express significantly more concern for the restaurant health and service dining experience dimensions. This group also considers food to be an important dining experience dimension when selecting a restaurant for a dining experience, and does not consider social as a dining experience dimension.

Discussion

The study revealed three dining clusters with heterogeneous behaviour and preferences that were influenced by a variety of socio-demographic and behavioural characteristics, known as "young family diners", "time saver diners" and "experience seeker diners".

The "young family" diners have similar characteristics to the "Fraternizing Kitchen Fearfuls" cluster in a study by Duncan, Josiam, Kim and Kalldin (2015:1391) that assessed casual diner behaviour. These diners were also young, enjoyed going out to socialise with family and noted the quality of service as important. A study by Ha and Jang (2013:402) developed restaurant segments, among which the "casual" cluster shows comparisons with this study. These consumers dined with an emotional value to feel happy or relaxed during dining. The most frequent benefits were to enjoy the experience with family and friends in a welcoming dining environment.

The "young family" cluster appears similar to the "health-food seekers" of Yuksel and Yuksel (2002:326), in that they value the restaurant's healthy food choices and they are concerned about the location and accessibility of the restaurant. The "young family" diners in this study demonstrated characteristics similar to those of the "young family" black diamond segment identified by the UCT Unilever Institute of Strategic Marketing and TNS Research Surveys (2006, 2008).

The findings for "time saver" diners were similar to previous research by Ha and Jang (2013:401), who noted that the "fast-food" cluster of diners tends to value convenience as the most important reason for dining out. These budget-conscious consumers like to spend time with family and friends and want to make them happy with tasty food, which connects with the feeling of belonging and social sharing. The "time saver" diners also show some similarities with the "upcoming locals" noted by (Mashaba & Wiese, 2016:49) in their appreciation for the convenience of restaurants with available parking.

The "experience seeker" diners are comparable to the segment described by Ha and Jang (2013:402) as the "fine-dining group". "Fine-diners" are known to place emotional value on a high-quality dining experience environment, exceptional service, knowledgeable staff and menu variety. These diners also like to spend time with family and friends, and their dining companions enhance food enjoyment and mood during socialising. Furthermore, this segment likes new adventures, since food trends and new eating habits are known to be part of fine-dining. The "adventure seekers" group identified by Yuksel and Yuksel (2002:326) in segmenting tourists corresponds with "experience seekers" in this study. They viewed adventure seekers as consumers with a need for new and interesting food, who place high importance on the location of the restaurant.

The availability of healthy and nutritious food choices was less important to them. It was also noted that this segment included consumers over the age of 50. As Sun and Morrison (2007:388) noted, consumers that are older and healthier than their peers like to dine out for convenience and socialising with family and friends. These consumers focus on quality service and the dining experience environment, but are less price conscious. This explains the two different age groups in one segment that display the same dining needs.

The "experience seeker" diners in this study demonstrated characteristics similar to those of the "established" South African black diamond segment identified by the (UCT Unilever Institute of Strategic Marketing and TNS Research Surveys, 2006, 2008) based on their age and income. Even though this segment differed from the "black diamonds" segments identified by Kruger and Saayman (2014:9), the importance that this segment assigned to attending a music performance as a unique experience and for its entertainment value was similar to the motivation of "experience seekers" in this study. The "experience seeker" diners of this study have similar needs for socialising to the "socialists" mentioned by (Kruger & Saayman, 2016:352). They would also like to socialise during a dining experience with good food and service.

The profiles of the three segments (*young family diners, time saver diners* and *experience seeker diners*) show similar patterns, but at different levels. With regard to the dining experience dimensions, the *young family diners* prioritise *restaurant accessibly, health* and *service* as important dining experience dimensions. The *time saver* diners agree on the dimensions, but at a lower level of importance. The *experience seeker* diners also regard *restaurant health* and *servic*e as important, but add the importance of *food* to the dining experience.

All the clusters tend to dine out more with family; the *young family diners* demonstrate this tendency to the greatest extent, and the *time saver diners* to the least extent. With respect to the reasons for dining out, the MOP cluster likes to dine out as part of socialising and convenience, but the *young family diners* are more socially orientated than the *time savers*. The *experience seekers* consider both as reasons for dining out. This study clearly demonstrates that there are distinct consumer groups within the total market, and thus, restaurateurs could enhance sales volume and profits by developing market-specific strategies based on a scientific approach to segmentation, rather than on the basis of their own intuition.

A profile of the three segments is displayed in Figure 1.

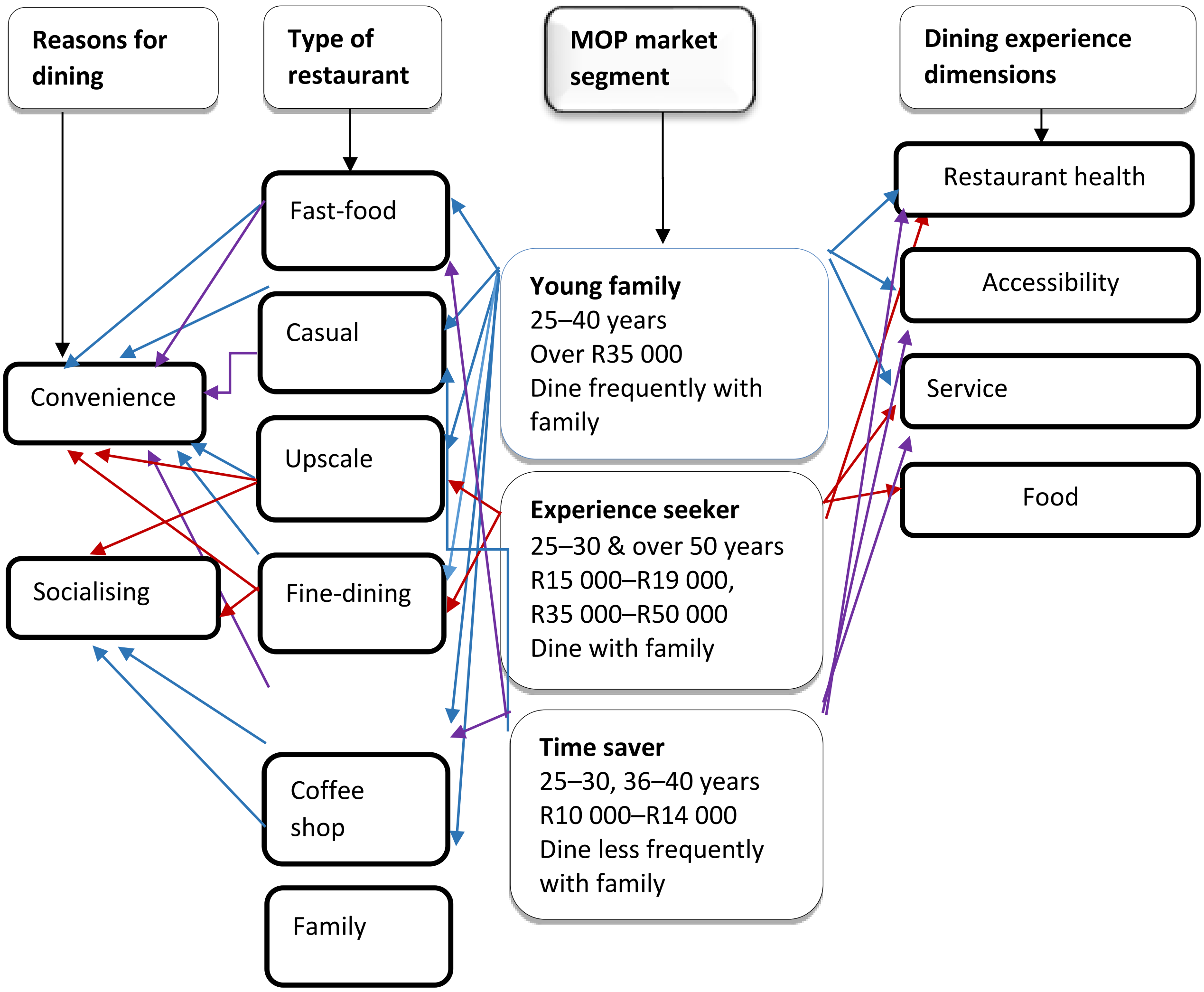

Figure 1: Dining profile of MOP sub-segments

Managerial implications

The study is among the first to analyse full-service restaurants in different locations for the South African MOP market segment and to propose and confirm the impact on their expected dining experience dimensions. In particular, the study also makes a contribution to science in understanding the similarities and differences between the dining variables, and has distinct advantages for marketers in the restaurant industry. The findings of this study offer exploratory insight into dining segments. An important finding of this study is that within the MOP market segment, three distinct dining segments were identified that take different sets of variables into account when making their restaurant-selection decisions.

The findings of this study could help restaurant managers to increase consumer retention by constantly evaluating their restaurant environment to continuously meet customer needs and to adapt to changing customer trends in terms of the dining experience dimensions identified in this study. A further contribution of the study to the restaurant industry is to identify important MOP consumer dining needs and expectations for different restaurant segments, which could help restaurateurs in developing appropriate marketing messages and business strategies.

Limitations

In assessing the empirical study, the main limitation was that the sample frame could not be compiled on the basis of the web-based questionnaire alone. Further prospective respondents were therefore selected through a convenience sample approach among consumers at full-service restaurants.

Recommendations/conclusion

Western developed markets are known to have ageing populations. However, the South African market includes a significant MOP market segment, which is a growing brand-conscious group that tends to develop among young working adults. Marketers should therefore continue to gain knowledge and build research on the behaviour and potential impact of the total MOP market. More targeted marketing campaigns should focus on this group of consumers in order to understand how they continually shape decision-making as the MOP market segment.

Restaurateurs should not only take general notice of the importance of the dining experience dimensions described in this study. Those that are interested in attracting the MOP market segment should, in particular, note that this consumer segment is not homogeneous but is divided into three market sub-segments on the basis of certain characteristics, namely the *young family diners*, *experience seekers* and *time savers*, which have different dining needs (in relation in age and income) that would influence their choice of restaurant and their needs in terms of differentiated dining experiences.

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