

AÑO 30 No. 109, 2025  
ENERO-MARZO



No. 109, 2025  
ENERO-MARZO



# Revista Venezolana de Gerencia



UNIVERSIDAD DEL ZULIA (LUZ)  
Facultad de Ciencias Económicas y Sociales  
Centro de Estudios de la Empresa

ISSN 1315-9984

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Como citar: Casadiego-Alzate, R., Balzan, A., Castañeda-Quirama, T., y Velásquez-Calle, P. A. (2025). Market segmentation and perceived value in the gastronomy industry of Medellín, Colombia: an empirical study. *Revista Venezolana De Gerencia*, 30(109), 430-445. <https://doi.org/10.52080/rvgluz.30.109.17>

Universidad del Zulia (LUZ)  
Revista Venezolana de Gerencia (RVG)  
Año 30 No. 109, 2025, 430-445  
Enero-Marzo  
ISSN 1315-9984 / e-ISSN 2477-9423



# Market segmentation and perceived value in the gastronomy industry of Medellín, Colombia: an empirical study

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## Abstract

This study examines market segmentation within the gastronomic industry in Medellín, Colombia, focusing on perceived value, consumer types, and brand positioning among young adults. Using a mixed-method approach with a sequential exploratory design, focus groups were conducted to identify key attributes valued by consumers. This data was the base for a subsequent quantitative survey, which delineated three distinct market segments characterized by their preferences for connectivity, cleanliness, reasonable prices, ambiance, quality of service, variety in dishes, portion size, and service time. The results suggest that young adults in Medellín prioritize a combination of quality and experience factors in their gastronomic choices. The conclusions highlight sociodemographic differences, such as the tendency of women to seek information about establishments before visiting the establishments or the preference of middle-class youth for casual dining restaurants, results that contribute to marketing management and tourism decision-making.

**Keywords:** segmentation; gastronomy; perceived-value; Medellín; mixed-methods

Recibido: 09.09.24

Aceptado: 20.11.24

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# Segmentación de mercado y valor percibido en la industria gastronómica en Medellín, Colombia: un estudio empírico

## Resumen

Este estudio examina la segmentación de mercado de la industria gastronómica en Medellín, Colombia, centrándose en el valor percibido, el tipo de usuarios y el posicionamiento de marca entre adultos jóvenes. Empleando un enfoque de métodos mixtos con un diseño exploratorio secuencial, se llevó a cabo grupos focales para identificar los atributos clave valorados por los consumidores. Estos datos sirvieron de base para una encuesta cuantitativa posterior, que delimitó tres segmentos de mercado caracterizados por sus preferencias en cuanto a conectividad, limpieza, precios razonables, ambiente, calidad del servicio, variedad de platos, tamaño de las porciones y rapidez del servicio. Los resultados sugieren que los adultos jóvenes de Medellín priorizan la combinación de factores de calidad y experiencia en sus elecciones gastronómicas. Dentro de las conclusiones se destacan diferencias sociodemográficas, como la tendencia de las mujeres de buscar información sobre los establecimientos antes de visitarlos o la preferencia de establecimientos de comidas casuales por parte de jóvenes de clase media, resultados que aportan a la gerencia de mercadeo y el turismo para la toma de decisiones.

**Palabras clave:** segmentación; gastronomía; valor percibido; Medellín; métodos mixtos

## 1. Introduction

The gastronomy industry in Colombia is situated in an economic activity that significantly contributes to the national income of the country (Asghar et al, 2021). Consequently, restaurants aim to create positive experiences through attributes related to quality, ambiance, decoration, and the service provided by staff (Rabanal de Dios, 2021).

This approach responds to the continuous demand for services with standards and requirements that consumers quickly modify, depending on

market trends (Mohd et al, 2021).

Food choices are more complex today compared to a few decades ago (Pérez-Villarreal et al, 2020) in Colombia, restaurants and hotels sector showed a growth of 1.4% in 2017; 2.6% in 2018, and 5.19% in 2019, exhibiting a positive trend that was maintained over time (DANE, 2017; 2018; 2019) Furthermore, these organizations adopt strategies that help them improve their competitiveness and remain in the market. In Medellín and its metropolitan Area, the restaurants are part of the "Tourism and Business

Cluster” a strategy led by the local Chamber of Commerce which seeks to strengthen their income structure through the coordination of activities that involve increasing the cooperation of the organizations that integrate it (Cámara de Comercio de Medellín, 2021).

Also, this industry contributes between 4 to 5% to the regional GDP, generating up to 60,000 formal jobs throughout the department of Antioquia (El tiempo, 2018). These businesses reflected 8.2% of Medellín’s business structure with an estimation of 8,781 companies (Zapata, 2020).

However, given the health emergency situation due to the COVID-19 pandemic in Colombia in 2020, many companies suffered consequences, mainly economic, leading to a reduction in their operations or the total cessation of their activities and of course loss of jobs in this sector (Castro, 2021).

According to the Colombian Association of the Gastronomic Industry (ACODRES), a reduction of up to 320,000 direct jobs was estimated, resulting in losses of approximately 1.9 billion US dollars (Semana, 2020); this as a reflection of the almost immediate consequences brought about by the confinement and restrictions implemented as public policy in Colombia.

Furthermore, in a report issued by DANE, the National Statistics Department of Colombia, in October 2020, it was shown that the nominal income of the “restaurants, catering, and bars” industry had a negative percentage variation of 44% (DANE, 2020). Likewise, national unemployment rate was already at 21.4% and particularly in Medellín, it was 21.6% (Medellín cómo vamos, 2020), this is, between 77,000 and 88,000 formal jobs were lost (Gutiérrez, 2020).

Furthermore, as result of the

COVID-19 pandemics, a radical change in people’s lifestyles has been triggered; that is, behavior associated with communication and purchasing has been substantially modified. For this reason, the identification of key attributes to carry out effective positioning strategies and mitigate the failure or financial crisis that owners of this type of business may face is of utmost importance (Coca, 2007).

After an extensive literature review, it is concluded that there is a scarcity of research conducted at the local level in a post-pandemic scenario for this industry; therefore, the opportunity arises to conduct this study aimed at analyzing the market structure of the gastronomy industry in Medellín considering the perceived value, segmentation, and positioning of different brands among the young-adult population. This type of study contributes key information for entrepreneurs in strategic decision-making processes.

## **2. Market segmentation: Literature Review**

Market segmentation is a fundamental process in strategic marketing, involving the division of a market into smaller, relatively homogeneous parts based on a shared characteristic (Kotler, 2012). This process enables a sharper understanding of the consumer (Lambin et al, 2009), serving as a valuable tool for enhancing customer relationships by tailoring products and services to the needs of specific groups (Johnston & Marshall, 2009). It also facilitates the creation of highly personalized content for media channels targeting precise audiences (Stalgaitis et al, 2022). Psychographic segmentation leads to the description of unique needs, desires, and behaviors (Kazbare et al,

2010; Slater, 1996), uncovering trends or behavior patterns useful in marketing strategies (Yeo et al, 2020).

Regarding brand positioning, it has been defined as a process through which a distinctive place is achieved in the consumer's mind, it is also a management strategy aimed at creating an impression of the product or service based on the desires of the target market (Kotler & Armstrong, 2008; Musa et al, 2019). Based on these characteristics, Ayuningtyas & Uljanatunnisa (2019), Daabes & Kharbat (2017), and Siyal et al, (2021) indicate that positioning aims to generate loyalty and build a brand image associated with excellence and uniqueness of the products offered. This becomes a necessary strategy for all organizations to ensure an increase in consumers' purchase intention (Mohd, 2017).

In accordance with the previous approach, it's important to consider that the achieved positioning requires that the value propositions fulfill all the declared commitments under which the market associated the brand. Tukker & Tischner (2006) defined value propositions as the mix of tangible and intangible aspects that must satisfy customer demands. This concept has adapted to changes in the business environment, and value propositions have been associated with recent phenomena such as online

consumption (Sousa et al, 2020); the offering of vegan products (Cooper et al, 2022); and the contribution to social and environmental interests that companies can make through their products (Poulter & Bolton, 2023).

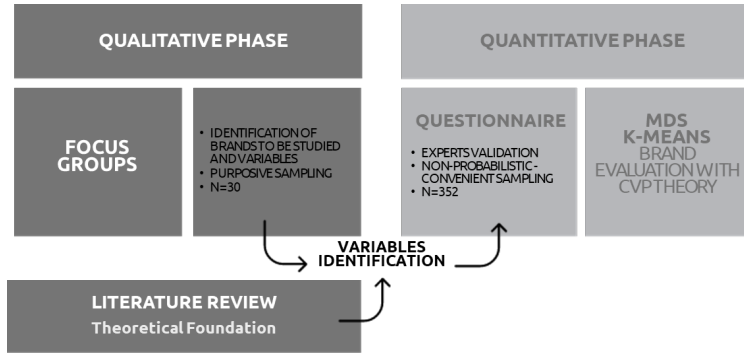
This way, perceived value refers to the comparative evaluation that consumers make of the performance of products or services, based on the perception of what they claim versus what they actually offer. The results of this evaluation help in planning marketing actions to create stronger bonds with the brand (Belarmino et al, 2021; Ge et al, 2021; Kwak et al, 2021; Slack et al, 2021).

### **3. Methodological aspects**

The research employed a mixed-methodology approach with an exploratory sequential focus, driven by the aim to understand how young people perceive the performance of gastronomic establishments in Medellín. Focus groups served as a qualitative technique to collect data, and through the quantitative phase, ratings revealed the market structure.

The study was conducted in two phases (Diagram 1); the first aimed to identify the variables and brands underlying appreciated by customers.

**Diagram 1**  
**Visualization of the Exploratory Sequential Design Procedure**



A group of sessions were conducted to define the gastronomic establishments (Table 1) and aspects relevant to their choice (value generators), this process will be described in the section Sampling and Data Collection. Thus, the attributes defining brand performance

were consolidated after refining the list created. Additionally, the number of brands subjected to the evaluation process emerged from the frequency of mentions by participants in this exploratory stage.

**Table 1**  
**Restaurants included for evaluation**

| Name of the restaurant     | Food Type                      |
|----------------------------|--------------------------------|
| Pesquera Jaramillo         | Seafood                        |
| Hernán Patacón             | Seafood; Caribbean food        |
| Del Rio y del Mar          | Seafood; Caribbean food        |
| La Fragata                 | Seafood                        |
| Donde Bupos                | Seafood                        |
| Andrés Carne de Res        | Steak house                    |
| La Pampa Argentina         | Steak house; Argentinean grill |
| Leños y Carbón             | Steak house                    |
| Angus Brangus              | Steak house                    |
| El Corral                  | Burgers                        |
| McDonald's                 | Burgers                        |
| Burger King                | Burgers                        |
| SUBWAY                     | Sandwiches                     |
| Domino's Pizza             | Pizza                          |
| Papa John's                | Pizza                          |
| KFC Kentucky Fried Chicken | Fried chicken                  |
| Frisby                     | Fried chicken                  |

Based on the provided inputs, a questionnaire for comparative evaluation was designed using the Customer Value Proposition (CVP) theory. It was structured into three sections: 1) filter questions about consumption in the studied brands and city of residence; 2) sociodemographic characteristics of consumers; and 3) evaluation of performance in attributes. Importantly, evaluations were limited to brand selected in section one to ensure that the data reflected actual consumption experiences. The approach for the previous process used a five-point Likert scale ranging from 1 (Strongly Disagree) to 5 (Strongly Agree). The statements were adapted from previous studies that had investigated these variables; therefore, they were customized to the research problem and validated by experts.

The data for the exploratory and quantitative stages were collected in Medellín. Initially, a sample of 30 individuals meeting the following criteria was sought: residing in Medellín and being between 21 and 24 years old; the World Health Organization (WHO) considers individuals within these ages as "young adults" (Galvis et al, 2023). A group of interest because as they currently spend a significant part of their leisure time on activities related to food consumption in restaurants (Varón & Daza, 2022). The 30 individuals were divided into five groups of six participants each, ensuring they did not know each other to avoid any type of hierarchy. In these groups, participants were provided with information about the purpose of the call, formal participation requirements, and permissions to record the information gathered during the session, which was planned to last 60 minutes.

Subsequently, data on brand and

attribute evaluations were collected through an online self-administered questionnaire from adults living in Medellín. A non-probabilistic convenience sampling was used due to its advantages related to speed and relatively low costs for information collection (Gorard, 2013), achieving a total of 352 valid responses collected from February 2022 to June 2023. All participants read and signed an informed consent form, which had been previously approved by the ethics committee of the Institución Universitaria Politécnica Grancolombiano.

The statistical analysis of the data was conducted using RStudio version 4.1.1. Firstly, frequencies and proportions were used for sociodemographic characteristics, then, the Multidimensional Scaling (MDS) method was employed to identify the distances between the various attributes studied. Finally, the K-Means clustering method was used to identify the predominant market categories in Medellín's young population based on the scores obtained in brand performance.

#### **4. Marketing features of the gastronomic industry**

Regarding the gender distribution in the exploratory stage, a balanced group was aimed for: 50% men and 50% women residing in Medellín. Age-wise, 100% of participants were within the 21-24 years range. In the quantitative phase, female respondents predominated, accounting for 63.1% of the survey responses with age distribution remained within the 21-24 years range, consistent with the inclusion criteria filter questions in the questionnaire. These results indicate a trend among Medellín's "young" women in seeking information about dining out, suggesting marketing actions should

primarily target this demographic for greater impact (Yeo et al, 2020).

Furthermore, 51.8% had incomes between two to three Colombian minimum wages (estimated in US \$340, Reuters, 2023), indicating a higher frequency of service usage among families with a moderately high purchasing power. Most respondents were employed (95.5%), and the predominant educational level

was professional (41%).

In the exploratory exercise, thirty individuals were asked about the attributes they consider decisive when choosing to eat out. Based on their responses and a literature review, relevant factors in selecting and positioning gastronomic establishments were defined for comparative evaluation (Table 2).

**Table 2**  
**Attributes selected to evaluate Positioning**

| Attribute                             | Description   |
|---------------------------------------|---|
| <b>Connectivity</b>                   | Possibility of accessing WiFi within the establishment  |
| <b>Cleanliness</b>                    | Hygiene and sanitation conditions of the restaurant.  |
| <b>Reasonable Price</b>               | Monetary value that the person gives for tangible element (dishes) to enjoy a service. In the study, a high rating in the price assessment implies a good quality-cost ratio. |
| <b>Ambiance -Physical Environment</b> | Conditions of the establishment related to decoration, props, lightning conditions, ventilation and security.   |
| <b>Quality of Service</b>             | People's perception of staff characteristics related to service.  |
| <b>Variety in Dishes</b>              | Options available on the menu so people can choose.   |
| <b>Size</b>                           | Dimensions of spaces that the establishment has.  |
| <b>Service Time</b>                   | Speed of service in terms of reception, order taking, order delivery, bill delivery and payment in the establishment.   |

Participants were also asked about restaurants they quickly recall when these factors were mentioned (Top of Mind), resulting in 89 sites initially identified, narrowed down to 18 establishments based on frequent mentions.

With defined attributes and brands, a questionnaire for the quantitative study was developed to understand consumption preferences in gastronomic establishments and the CVP. Evaluations were framed as an association of

attributes and brands to prevent the questionnaire from being perceived as lengthy (Varela et al, 2002).

For the identification of the market structure based on the Customer Value Proposition (CVP), the ratings given by each of the 352 individuals on brands they had previously experienced were considered. Therefore, with the evaluation of perceived performance in each attribute, the arithmetic mean was calculated as shown in Table 3.



**Table 3**  
**Average performance in attributes**

| Restaurant | Connectivity | Cleanliness | Reasonable Price | Ambiance | Quality of Service | Variety In dishes | Size | Service Time |
|------------|--------------|-------------|------------------|----------|--------------------|-------------------|------|--------------|
| 1          | 3.22         | 4.44        | 3.44             | 4.33     | 4.22               | 4.11              | 4.56 | 3.33         |
| 2          | 3.00         | 4.50        | 3.80             | 4.20     | 4.20               | 4.10              | 4.20 | 3.20         |
| 3          | 3.88         | 4.25        | 3.75             | 4.13     | 4.00               | 4.25              | 4.00 | 3.50         |
| 4          | 3.46         | 4.23        | 3.31             | 4.15     | 4.15               | 4.00              | 3.85 | 3.38         |
| 5          | 2.75         | 4.38        | 4.00             | 3.75     | 4.50               | 4.13              | 3.63 | 2.88         |
| 6          | 4.21         | 4.43        | 4.14             | 4.36     | 4.29               | 3.50              | 4.43 | 3.50         |
| 7          | 3.64         | 3.68        | 4.00             | 4.32     | 4.18               | 2.55              | 3.73 | 3.45         |
| 8          | 4.42         | 4.58        | 4.50             | 4.67     | 4.42               | 3.75              | 4.42 | 4.17         |
| 9          | 4.14         | 4.36        | 4.29             | 4.29     | 3.86               | 3.50              | 4.43 | 3.71         |
| 10         | 4.29         | 4.29        | 4.71             | 4.57     | 4.57               | 3.83              | 4.14 | 4.14         |
| 11         | 2.88         | 3.50        | 3.16             | 3.56     | 2.63               | 3.11              | 3.39 | 3.28         |
| 12         | 3.40         | 2.55        | 1.63             | 2.75     | 1.94               | 1.74              | 3.00 | 3.50         |
| 13         | 3.10         | 2.44        | 2.35             | 3.33     | 2.5                | 2.69              | 3.52 | 3.43         |
| 14         | 2.67         | 3.33        | 2.85             | 2.65     | 2.81               | 2.70              | 3.09 | 3.61         |
| 15         | 3.6          | 2.69        | 2.45             | 3.19     | 2.29               | 2.00              | 3.56 | 4.06         |
| 16         | 4.00         | 3.22        | 1.50             | 3.45     | 1.43               | 1.55              | 3.09 | 3.27         |
| 17         | 3.00         | 1.92        | 1.58             | 3.18     | 1.32               | 1.46              | 3.00 | 3.55         |
| 18         | 3.20         | 2.41        | 2.27             | 3.62     | 2.40               | 2.35              | 3.24 | 3.14         |

Based on the results, Euclidean distances between attributes were calculated, followed by the application of the Multidimensional Scaling (MDS) method for a graphical representation that allowed describing the proximity degree between these variables (illustration 1). The goodness of fit of this technique to

the sample data was assessed using the “stress” proximity indicator. According to Aldás & Uriel (2017), the obtained global value should be as small as possible, with established comparison ranges to qualify precision. In this study, a value of 0.045 was obtained, considered good for the data set of the quantitative phase.

## Illustration 1 Graphic representation of the Multidimensional Scaling (MDS)

**Configuration Plot**



The two-dimensional representation facilitates conjectures about existing groupings in the data set, considering the degree of proximity. To confirm this and delve deeper into the results, parallel analysis and the scree plot were used to identify the number of components to retain based on the amount of explained variance (Aldás &

Uriel, 2017). Both analyses suggested three dimensions, serving as the basis for the application of the K-Means segmentation method, which, according to Ferreira Lopes et al. (2011), can be used post hoc. The centroids estimation was performed using the MDS distance matrix. The results of this estimation are shown in Table 4.

**Table 4  
 Centroids estimation for clusters**

| Cluster | Connectivity | Service Time | Reasonable Price | Quality of Service | Variety in dishes | Cleanliness | Ambiance    | Size        |
|---------|--------------|--------------|------------------|--------------------|-------------------|-------------|-------------|-------------|
| 1       | 5.46         | 6.62         | 5.62             | 5.32               | 6.95              | <b>2.78</b> | <b>2.43</b> | <b>2.30</b> |
| 2       | 6.63         | 7.59         | <b>3.42</b>      | <b>3.11</b>        | <b>3.98</b>       | 5.28        | 6.44        | 6.18        |
| 3       | <b>2.19</b>  | <b>2.19</b>  | 6.37             | 7.32               | 7.64              | 7.06        | 5.98        | 5.08        |

The variables “size,” “ambiance,” and “cleanliness” would form a first cluster. Zhang et al, (2010) state that a restaurant’s environment includes aspects like “atmosphere”, “comfort”, “hygiene”, “size”, and “decoration”, suggesting the identification of a latent construct operationalized through these variables, considering the specific sociocultural aspects of young Colombians. “Cleanliness” as described by Jeong & Jang (2011) is the reflection of food quality, customer satisfaction, and positive electronic word-of-mouth (E-WoM) for the establishment, underlining the necessity for maintaining strict standards of cleanliness and sanitation to project a good image of the restaurant (Ryu et al, 2008).

Thus, as these factors conceptually represent the same dimension, an average was calculated for the entire construct, resulting in a value of 3.7, indicating a bias towards high scores. This method, known as ‘parcels’ in the literature, representing a score obtained through the sum or simple average of the items that make up a particular construct, assumed to reflect the conceptual dimension they represent (Marcoulides & Schumacker, 2001).

Studies like Wu & Liang (2009) conclude that scores are higher for this construct in restaurants classified as “luxurious,” supported by research from Rodríguez-López et al, (2020), who show that high scores on ambiance-related factors are characteristic of exclusive gastronomic establishments. This leads to the think that “*luxurious restaurants*” constitute the first prevalent gastronomic structure in Medellín, where such establishments aim to reflect more hedonic aspects, meaning customers seek more excitement, pleasure and enjoyment compared to functionality.

These findings emphasize the importance of “ambiance” as a differentiating attribute within all the existing categories, as those not only enhance to maintaining the current customers but attracting new ones. Canny, (2014), highlighting the need for careful attention to decoration, lighting, and color use to ensure an excellent gastronomic experience (Wu & Liang, 2009).

Attributes such as “variety in dishes,” “reasonable price,” and “quality of service” would be the second attribute grouping that define the “casual dining” industry classification, blending “full service” and “fast food” operation models to attract middle-income consumers who seek beyond fast food, enjoying an informal atmosphere and diverse dishes with professional service (Canny, 2014). In addition, “reasonable price” significantly influences consumption propensity and subsequent satisfaction (Wu & Liang, 2009). Jeong & Jang (2011) mention this attribute in the gastronomy industry as a crucial factor with perceived price fairness being a determinant in customer loyalty, where perceived unfairness leads to dissatisfaction, complaints, and diminished reputation. Professionals must carefully maintain prices that reflect value, aligning with the socioeconomic characteristics described.

The above implies that consumers demand qualities beyond basic needs satisfaction, with “service quality” being crucial for enhancing the dining experience. Continuous adaptation to customers’ taste and preference changes is essential for variety in dishes, considering it a vital criterion for offering local culture and cuisine perspectives (Chang et al, 2011). Suggesting that the establishments should keep updated

their offer to capture not only the attention of locals, but visitors who are looking for this kind of experiences.

Finally, “service time” and “connectivity” would represent a third cluster. Variables such as “connectivity” and “service time” both grouped in cluster 3 (see Table 4) refer in literature to a category of establishments known as “cafeterias” or “co-working spaces” (Marinho et al, 2017). These spaces are designed for people to consume both cold and hot drinks, as well as a wide variety of food items. Here, individuals can work and interact as long as the necessary conditions are met (Marinho et al, 2017); that is, “connectivity” ensures that clients working from home can perform their duties in those places, providing good internet speed.

Consequently, it's essential for the managers of these establishments to equip their spaces with elements that guarantee a positive experience in terms of working comfortably and efficiently. On the other hand, “service time” in this segment is associated with the staff's speed in responding to customer requests (Chang et al, 2011), thus, many young “digital nomads” spend much of their time in these places, meeting people or simply carrying out tasks related to their daily commitments.

The clustering achieved explains 69% of the total variance. Considering that the research objective is to identify market structure through the similarity or proximity between analyzed factors, the previous table confirms the assumptions described in the MDS graph.

## 6. Conclusion

The mixed-method design used in this research incorporated both exploratory and conclusive phases.

The first phase considered a total of 30 subjects that led to the identification of eight variables and 15 establishments for their performance evaluation within each identified attribute using the CVP theory. With the participation of 352 young subjects in Medellín. The application of multivariate techniques led to the consolidation of three variable clusters characterizing the city's gastronomic segmentation. These findings offer significant insights for Marketing, Tourism, and Management professionals by providing strategies for communication and strategic positioning based on key market attributes for a specific gastronomic category (Dodds & Holmes, 2017).

Sociodemographic aspects related to purchasing power and employment levels suggest that there has been an increase in the flow of young people towards luxury dining establishments after the pandemic. This is possibly due to habits inherited from parents in previous years. It's important for future research to consider aspects related to identifying the purchase motivators in this type of restaurant. Additionally, among the identified attributes, it's clear that “ambiance” reflects the structural differences in the operating model of each segment. Therefore, each establishment must ensure it has a sufficiently attractive atmosphere and decor to guarantee effective differentiation.

Regarding the “casual dining” segment, changes in the environment have modified the classic operating models, and this is empirically demonstrated in this study. The classic “fast food” establishment has gradually shifted towards a more personalized service focused on positive experiences. This is because young people represent consumers with high bargaining power,

having real-time information about most restaurants in this category. They demand that their time spent in a restaurant be as pleasant as possible, including fast food under a more personalized model.

As final considerations, it's vital to understand how young people evaluate gastronomic experiences across different restaurant categories to develop, adjust, and enhance the promotion of gastronomic products more effectively and forcefully.

Furthermore, these aspects could provide significant inputs in seeking to create a competitive advantage that can be sustainable over time, aiming to create memorable imprints for those demanding these services. Therefore, future studies should address other population segments to broaden the range of results and allow more establishments to have useful information for developing more effective marketing actions where benefits increasingly accrue to both providers and demanders. Benefits like service personalization, economies of scale and prices that truly reflect the value for the customer.

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