

IFMA CONSUMER FOOD JOURNEYSM:

APPLICATIONS FOR FOODSERVICE MANUFACTURERS

March 26, 2020

Webinar housekeeping notes

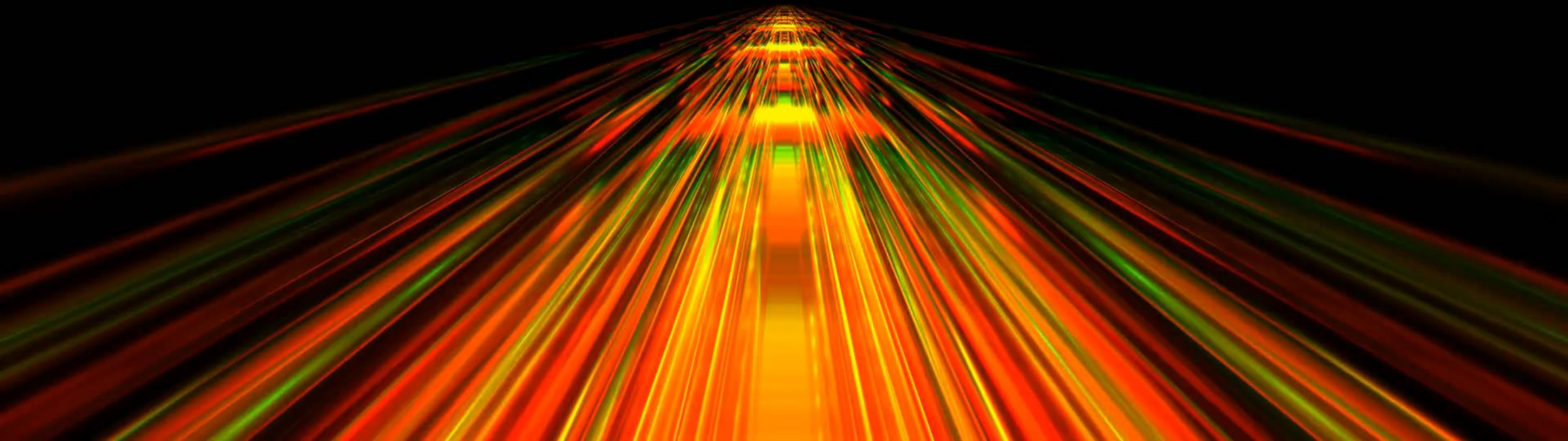
- All lines will be placed on mute for the duration of today's webinar.
- Questions can be asked throughout the webinar using the Question box.
- Questions can also be sent to charlie@ifmaworld.com.
- This webinar will be recorded and a copy of that recording will be posted to www.ifmaworld.com.



IFMA

**FOOD
FUTURE
2025**

Plan Your Path Forward



1

OPERATOR
LANDSCAPE

what's the
universe?

2

GO TO
MARKET

what do operators
need?

3

CONSUMER
FOOD JOURNEYSM

how do people
decide?

IFMA Consumer Food Journey Strike Team Companies

Mondelez

Nestle Professional

Custom Culinary

Bigelow

Cargill

Chobani

Georgia Pacific

High Liner Foods

Impossible Foods

McCain

Nestle

PepsiCo

Rich's

Sargento

Smuckers

Ventura

ACH

IFMA CONSUMER FOOD JOURNEYSM

- Focus Groups
- 15,000 Consumer Surveys
- 12 Months (Aug 2018 – July 2019)
- 28,708 Eating Events Captured



IFMA ScopeSM is your lens into the foodservice landscape, providing you access to strategic data and go-to-market tools in one dynamic portal.

**Operator
Landscape**

Go to Market

**Consumer
Food Journey**

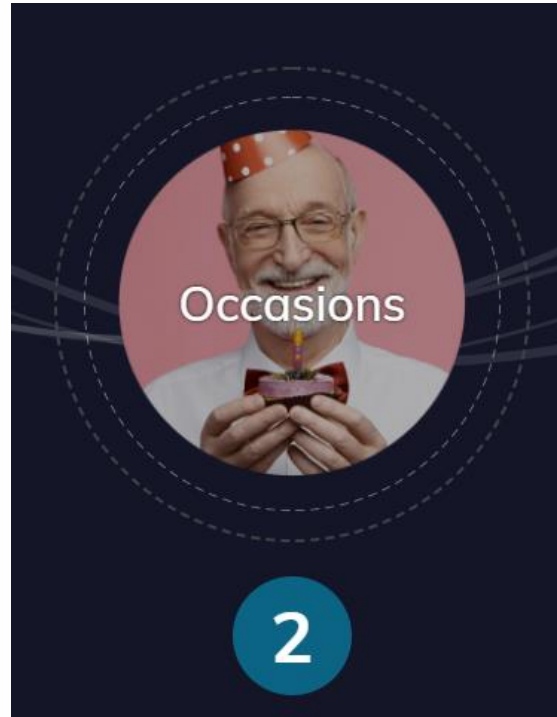
www.IFMAworld.com

Consumer Food Journey Portal

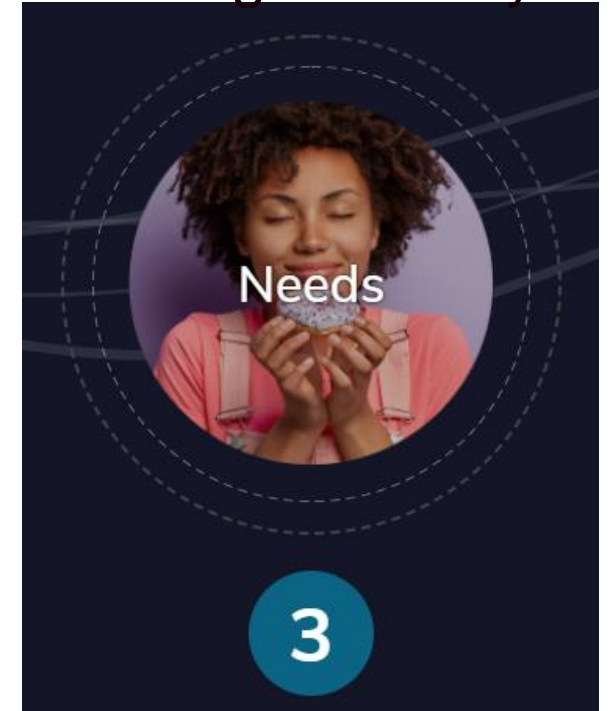
TRIGGERS start the Food Journey.



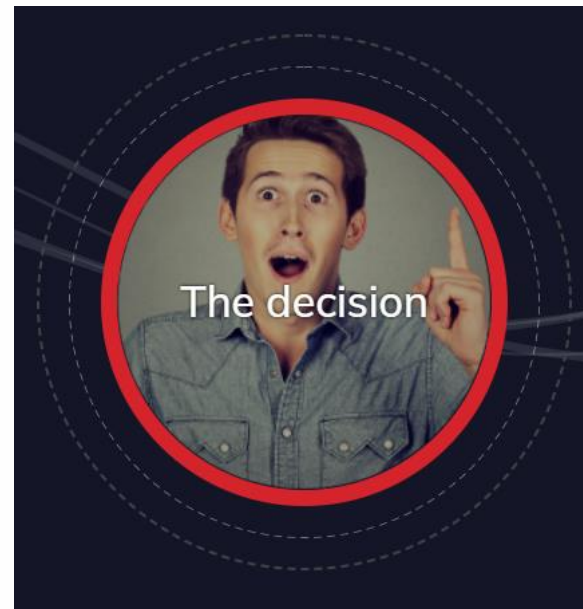
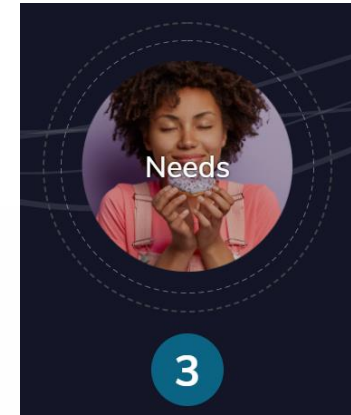
OCCASIONS define the scenario faced by the consumer.



What NEEDS is the consumer looking to satisfy?



Consumer Food Journey Portal



With all this in mind, the consumer makes a **DECISION**

Consumer Food Journey: Two Applications

1. Your company moves a lot of cases through Fast Casual restaurants. You have been given the directive to be a thought leader in the segment.
2. A strategic Casual Dining customer has reached out to your company. They are having a hard time being relevant to Millennials and have asked for your help.

Consumer Food Journey: Two Applications

1. Your company moves a lot of cases through Fast Casual restaurants. You have been given the directive to be a thought leader in the segment.

4-Step Process

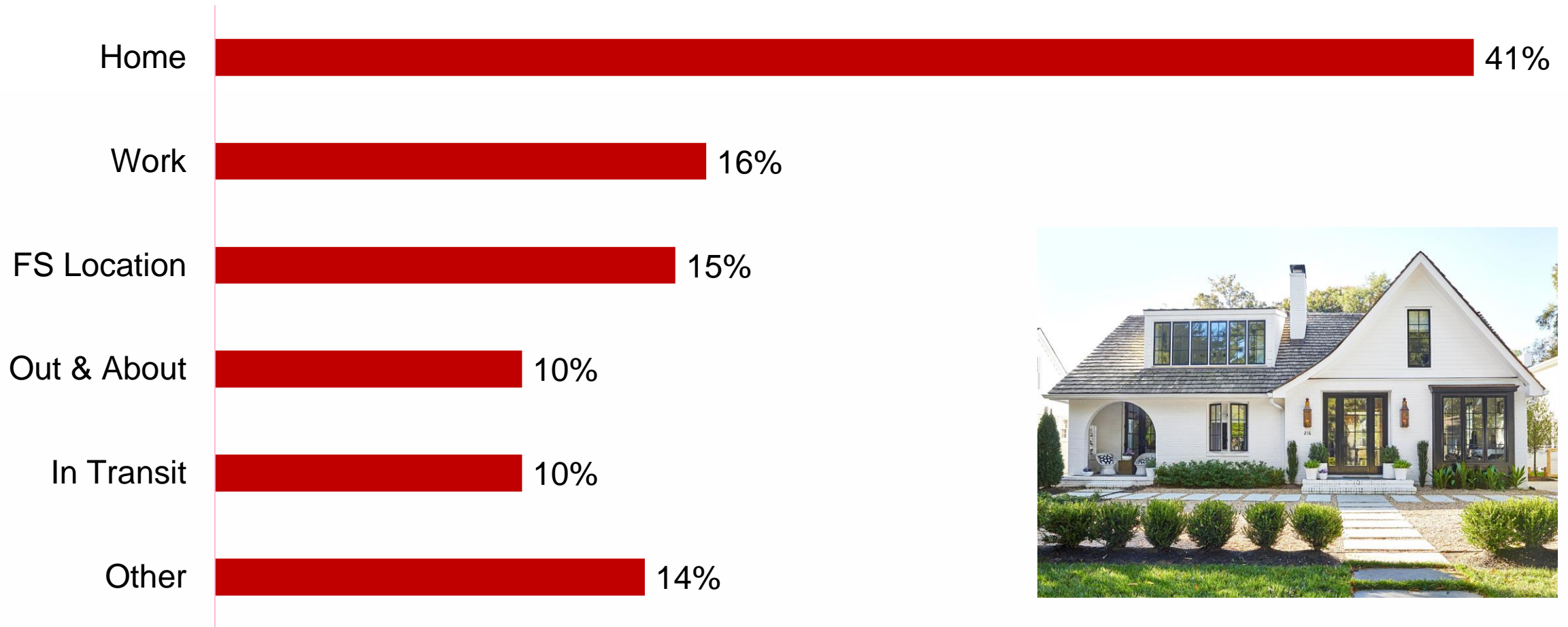
1. Select your focus segment from the Decision cards.

2. Study the Segment using Consumer Food Journey.

3. Extract the Triggers, Occasions, and Needs from that Segment.

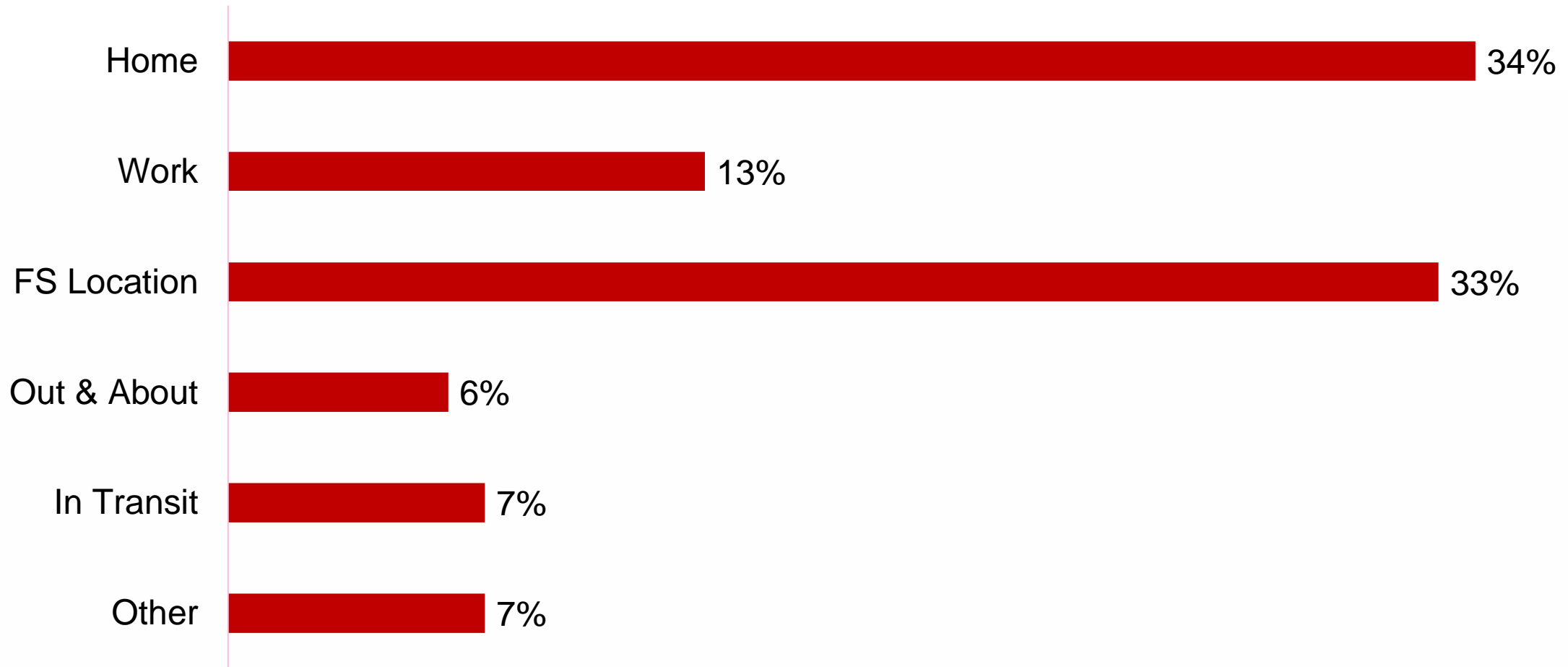
4. Study the most important Triggers, Occasions, and Needs.

Fast Casual: Consumer Decision Location



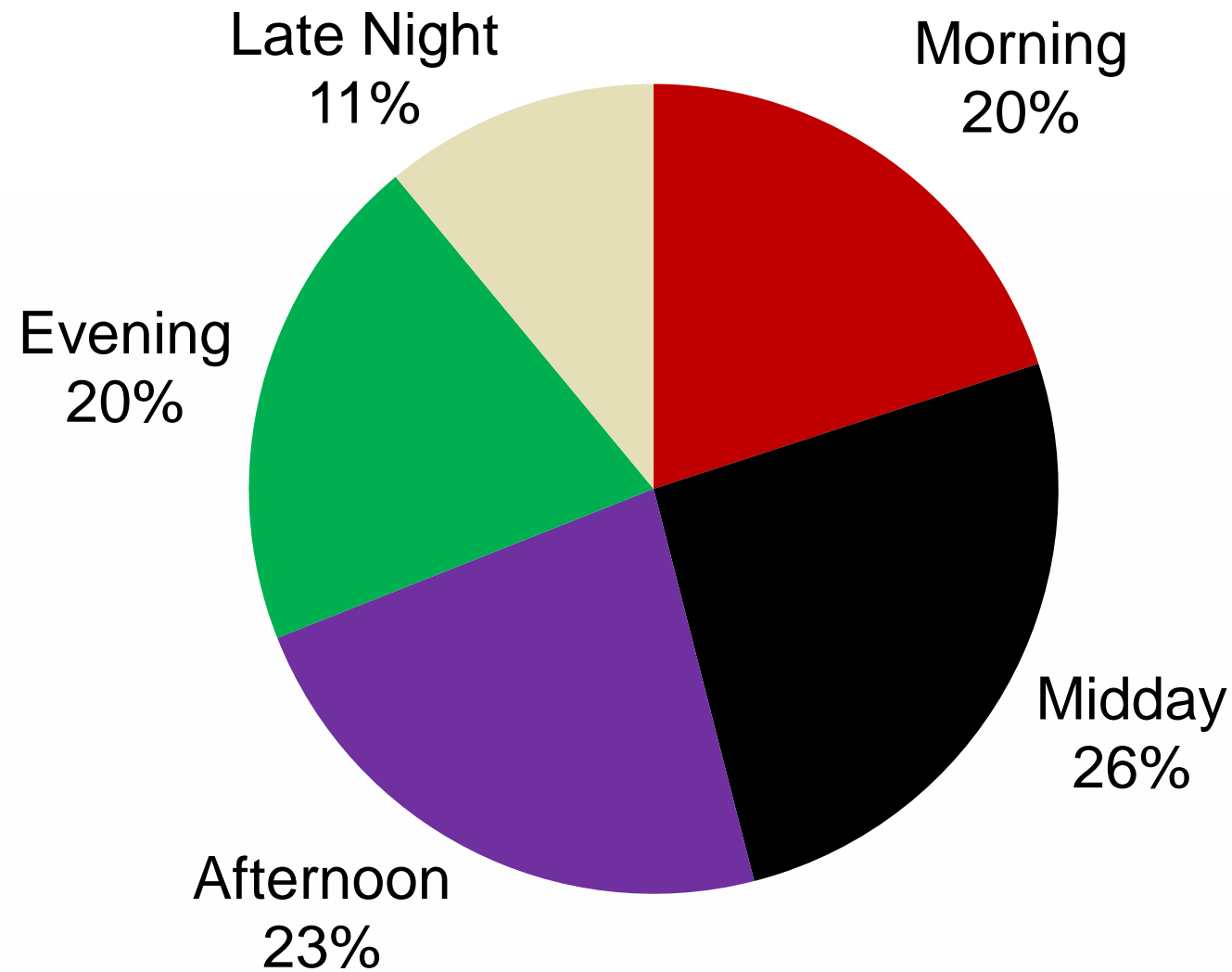
Source: IFMA ScopeSM

Fast Casual: Consumer Eating Location



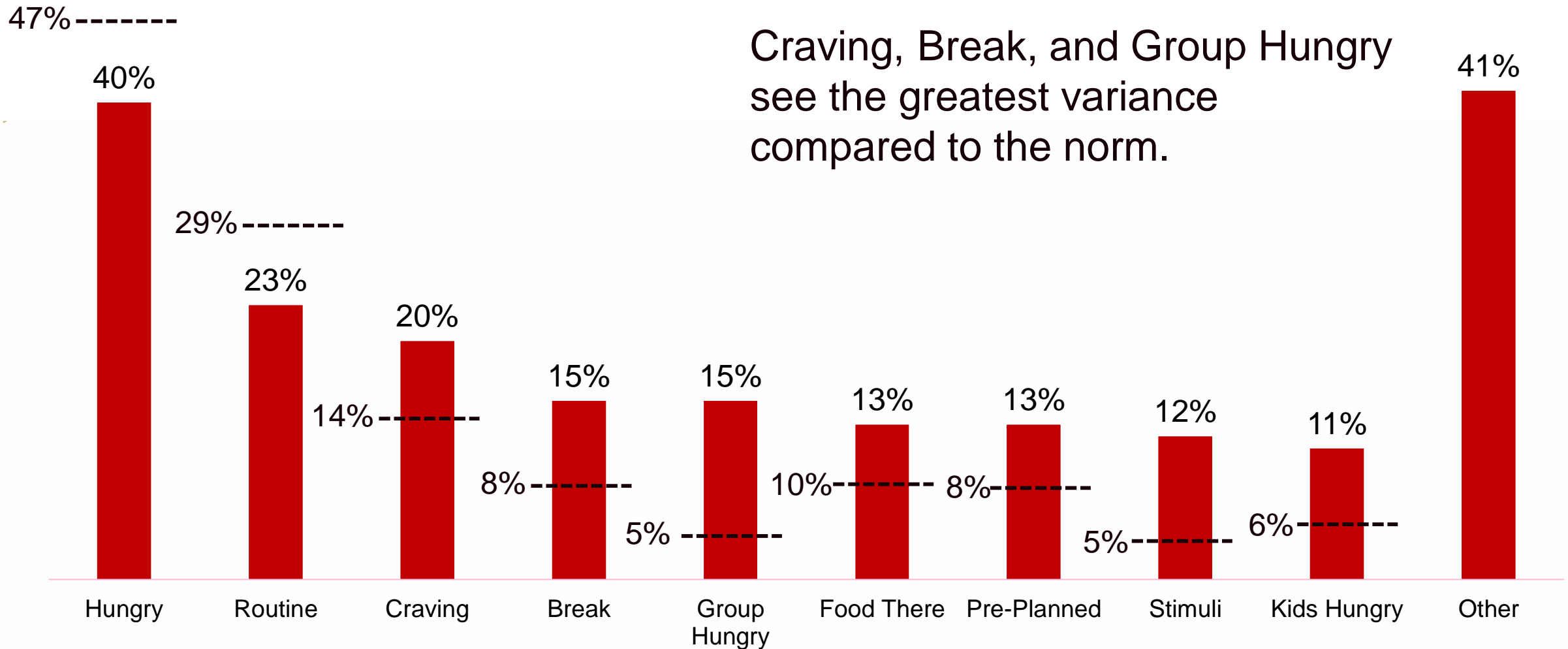
Source: IFMA ScopeSM

Fast Casual: Time of Day



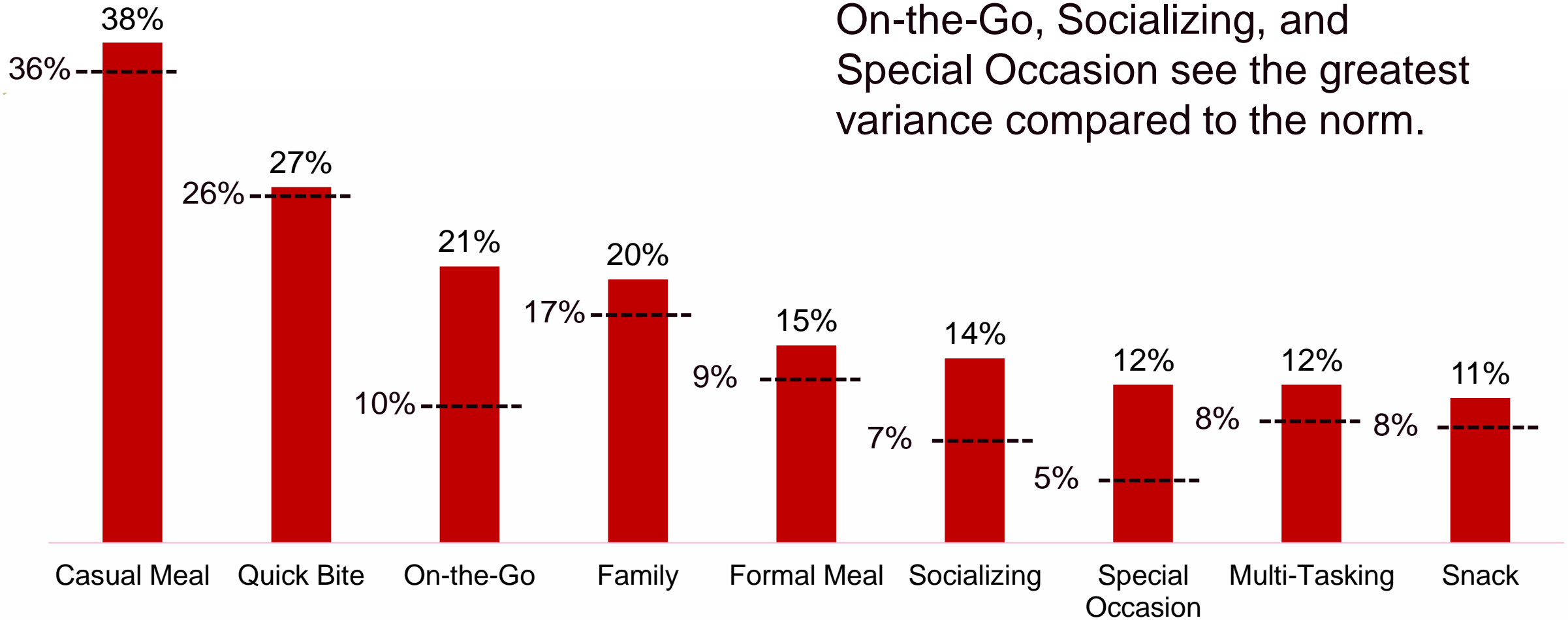
Source: IFMA ScopeSM

Fast Casual: Eating Triggers



Source: IFMA ScopeSM

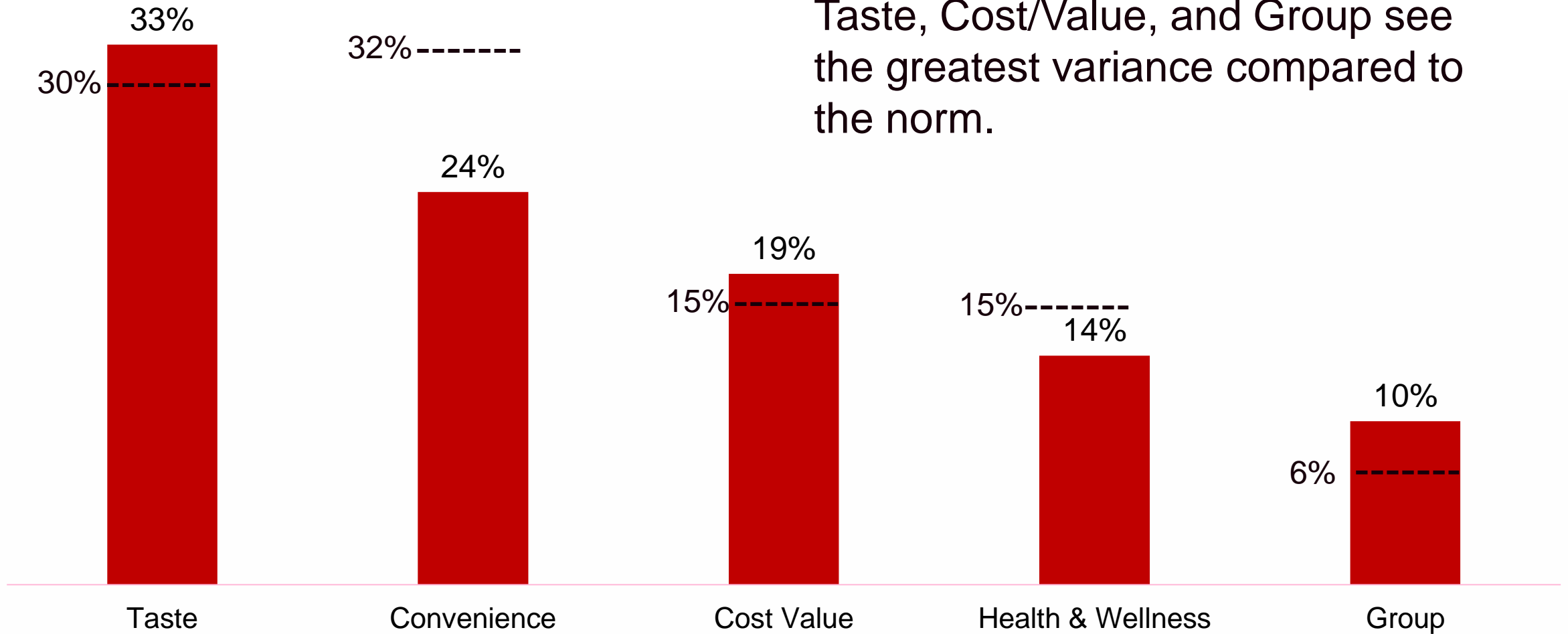
Fast Casual: Eating Occasion



Source: IFMA ScopeSM

Fast Casual: Mega Needs

Taste, Cost/Value, and Group see the greatest variance compared to the norm.



Source: IFMA ScopeSM

Fast Casual: Triggers, Needs, and Occasions

Triggers	Occasions	Needs
Craving	On-the-Go	Taste
Break	Socializing	Cost/Value
Group Hungry	Special Occasion	Group

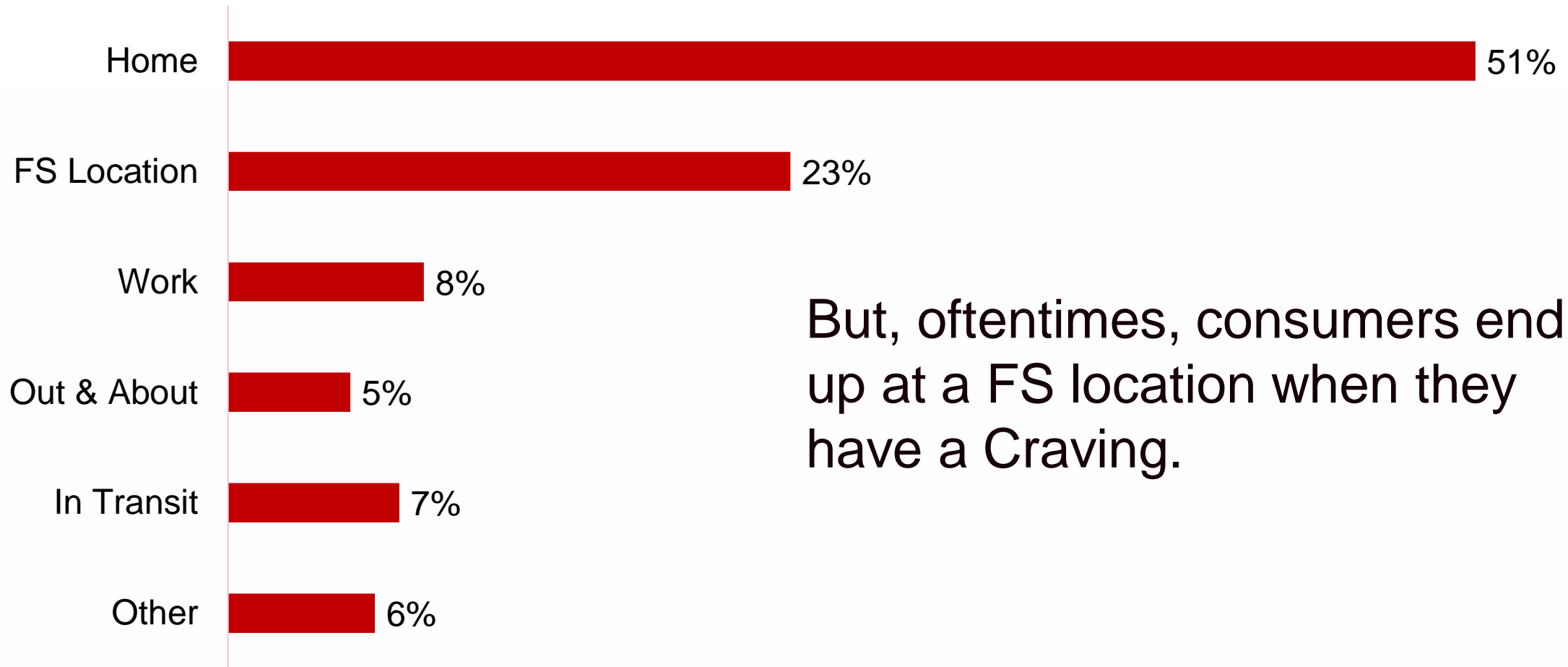
Craving: Consumer Decision Location



Cravings happen when people are in their homes.

Source: IFMA ScopeSM

Craving: Consumer Eating Location



But, oftentimes, consumers end up at a FS location when they have a Craving.

Source: IFMA ScopeSM

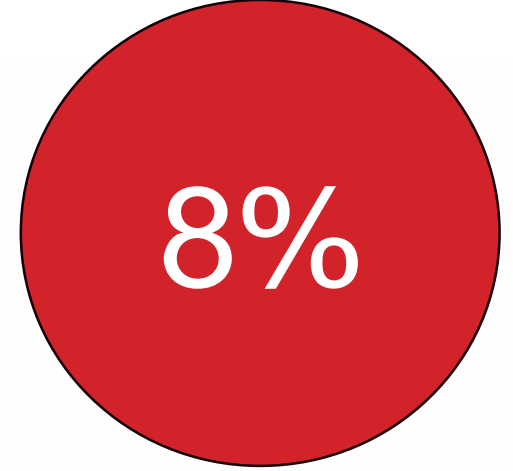
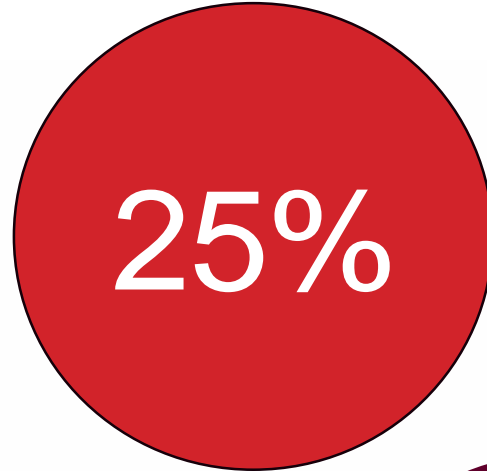
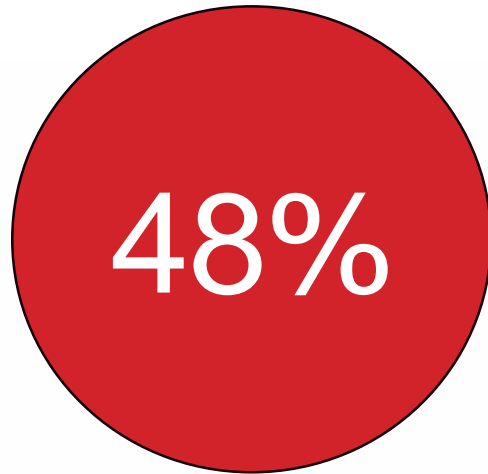
Craving: How Was Food Obtained

Food On Hand

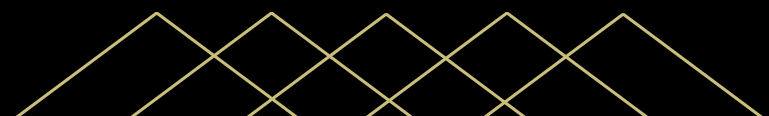
Go Elsewhere

Brought to Me

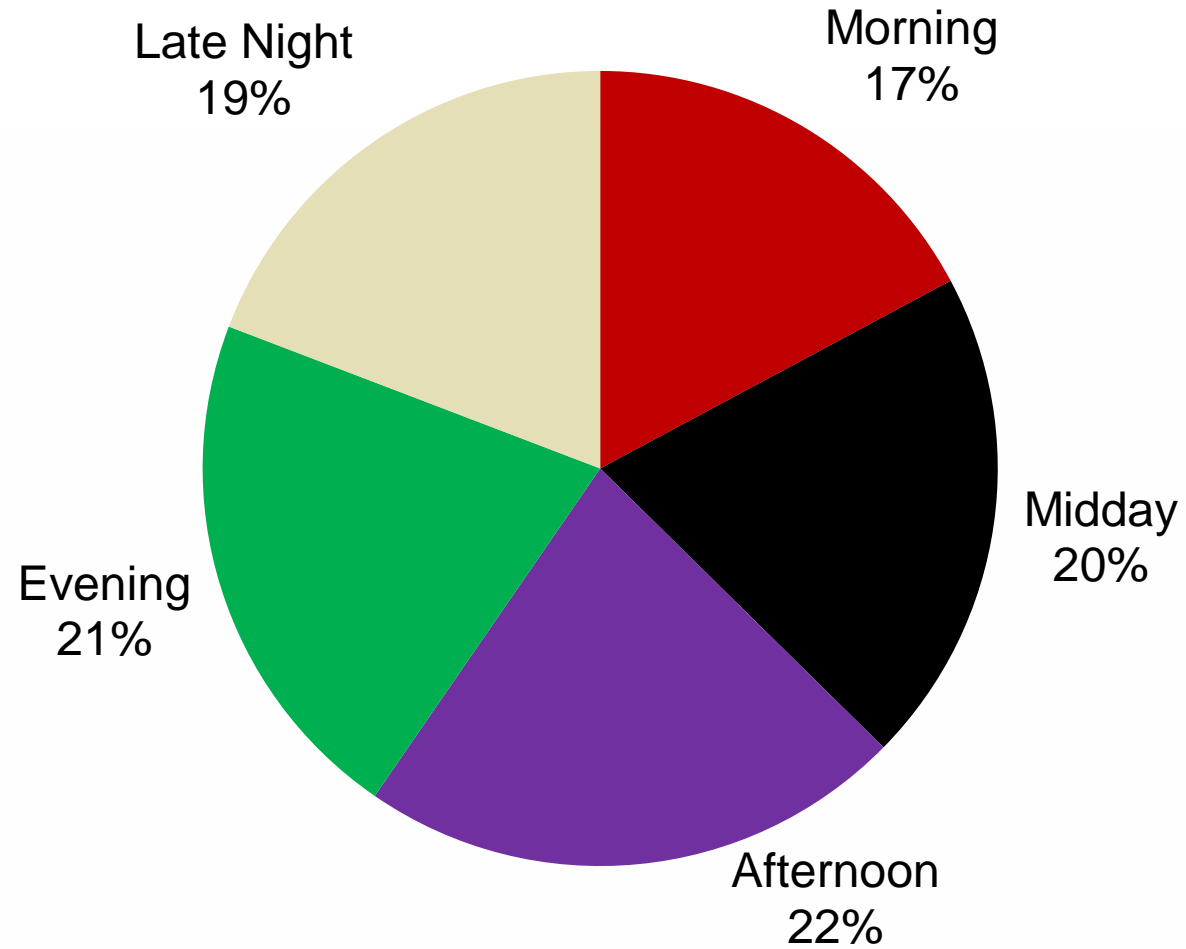
Delivery Service



Source: IFMA ScopeSM



Craving: Time of Day



Source: IFMA ScopeSM

Consumer Food Journey

1. Your company moves a lot of cases through Fast Casual restaurants. You have been given the directive to be a thought leader in the segment.
1. Craving, Break, and Group Was Hungry are the Triggers that drive more consumers, than on average, to use Fast Casual.
2. On-the-Go, Socializing, and Special Occasion are the Occasions that drive more consumers, than on average, to use Fast Casual.
3. Fast Casual can take advantage of consumers' Cravings throughout the day.

Consumer Food Journey

2. A strategic Casual Dining customer has reached out to your company. They are having a hard time being relevant to Millennials and have asked for your help.

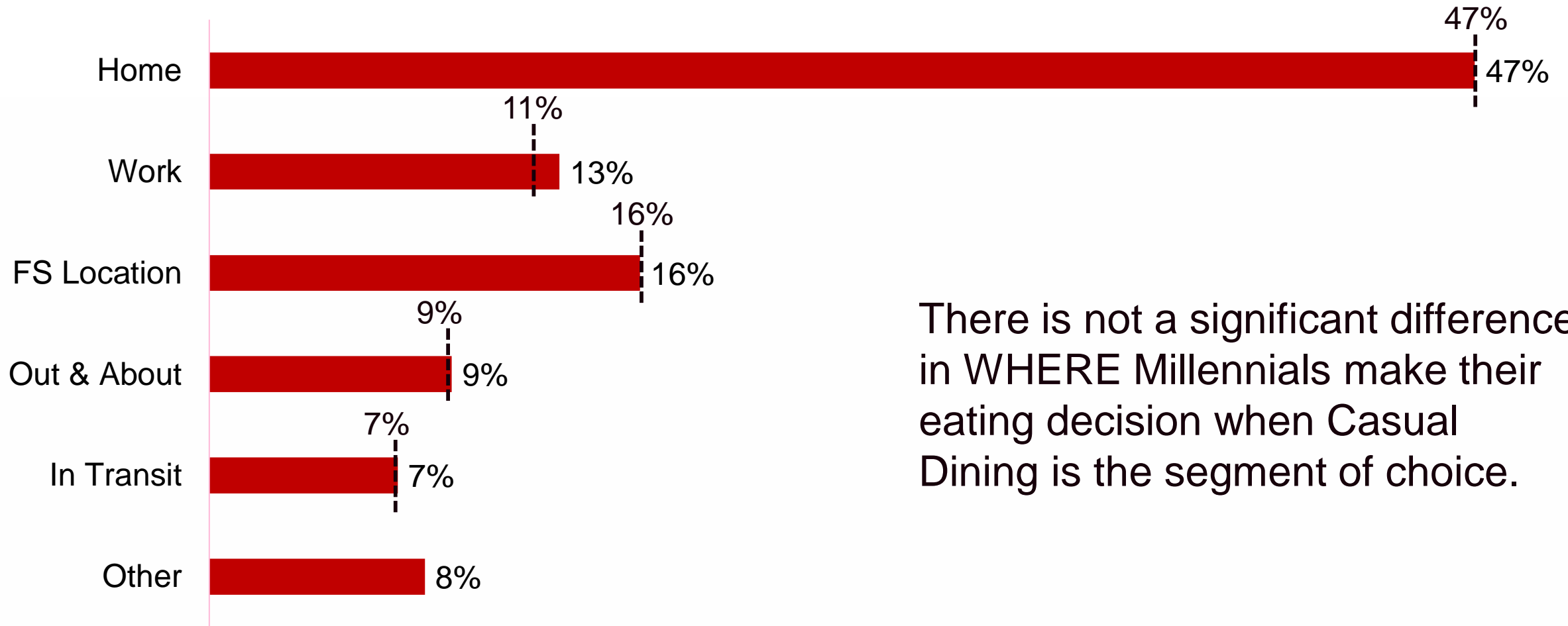
3-Step Process

1. Select your focus segment from the Decision cards.

2. Filter your results using Millennial demographic filter.

3. Identify how Millennials use segment differently than others.

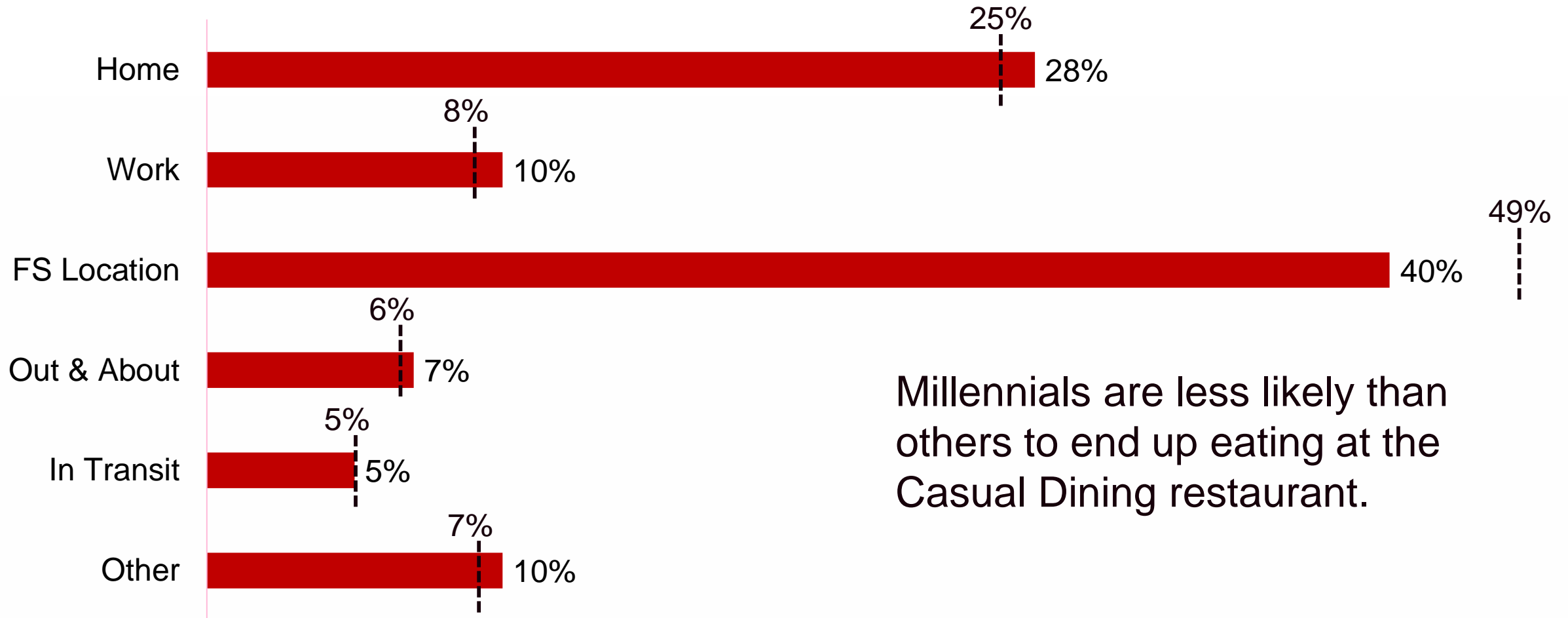
Casual Dining: Millennial Decision Location



There is not a significant difference in WHERE Millennials make their eating decision when Casual Dining is the segment of choice.

Source: IFMA ScopeSM

Casual Dining: Millennial Eating Location



Millennials are less likely than others to end up eating at the Casual Dining restaurant.

Source: IFMA ScopeSM

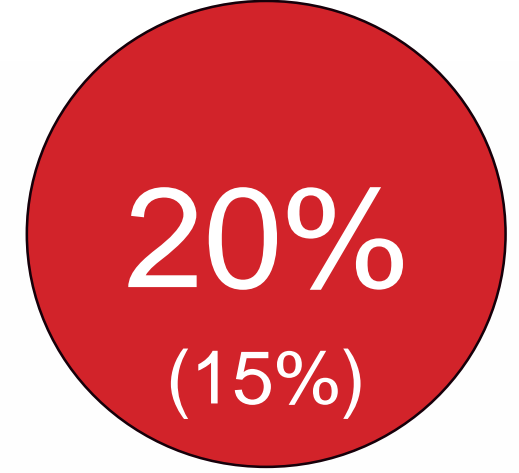
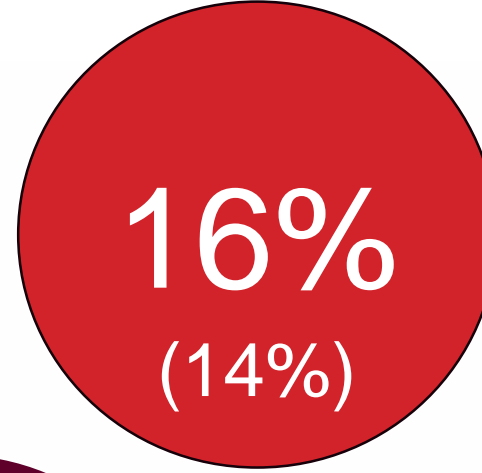
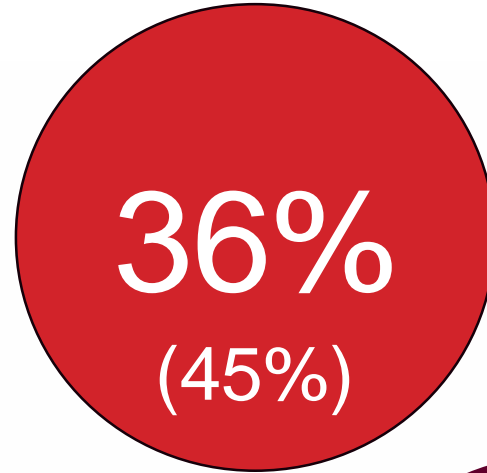
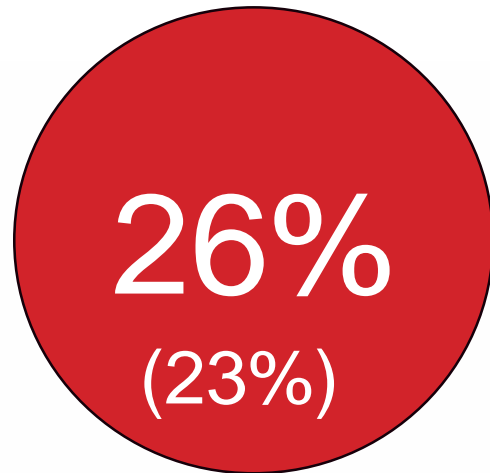
Casual Dining Millennials: How Was Food Obtained

Food On Hand

Go Elsewhere

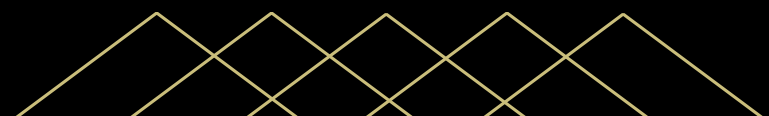
Brought to Me

Delivery Service

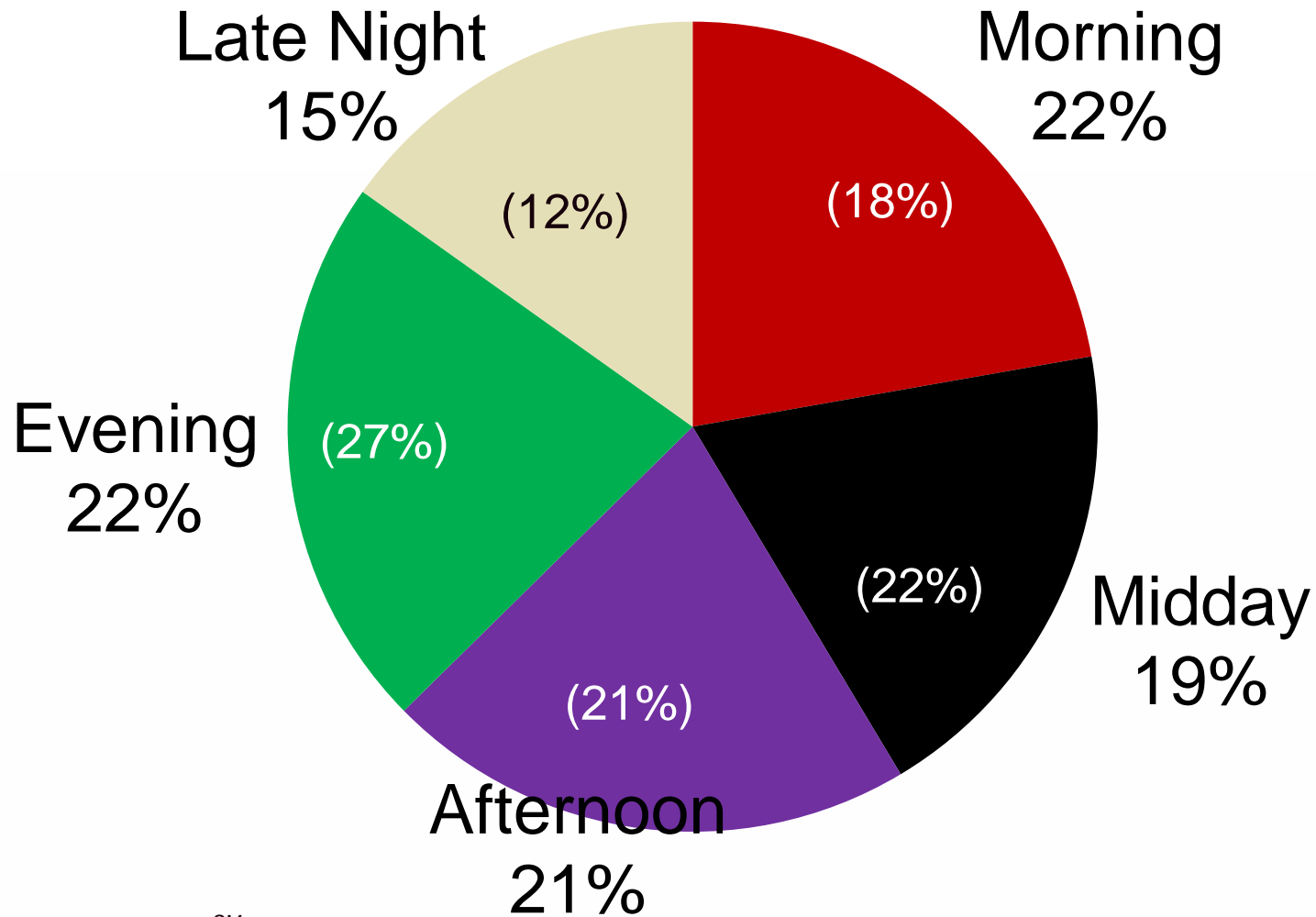


Millennials are more likely than others to use a delivery service when sourcing from a Casual Dining restaurant.

Source: IFMA ScopeSM



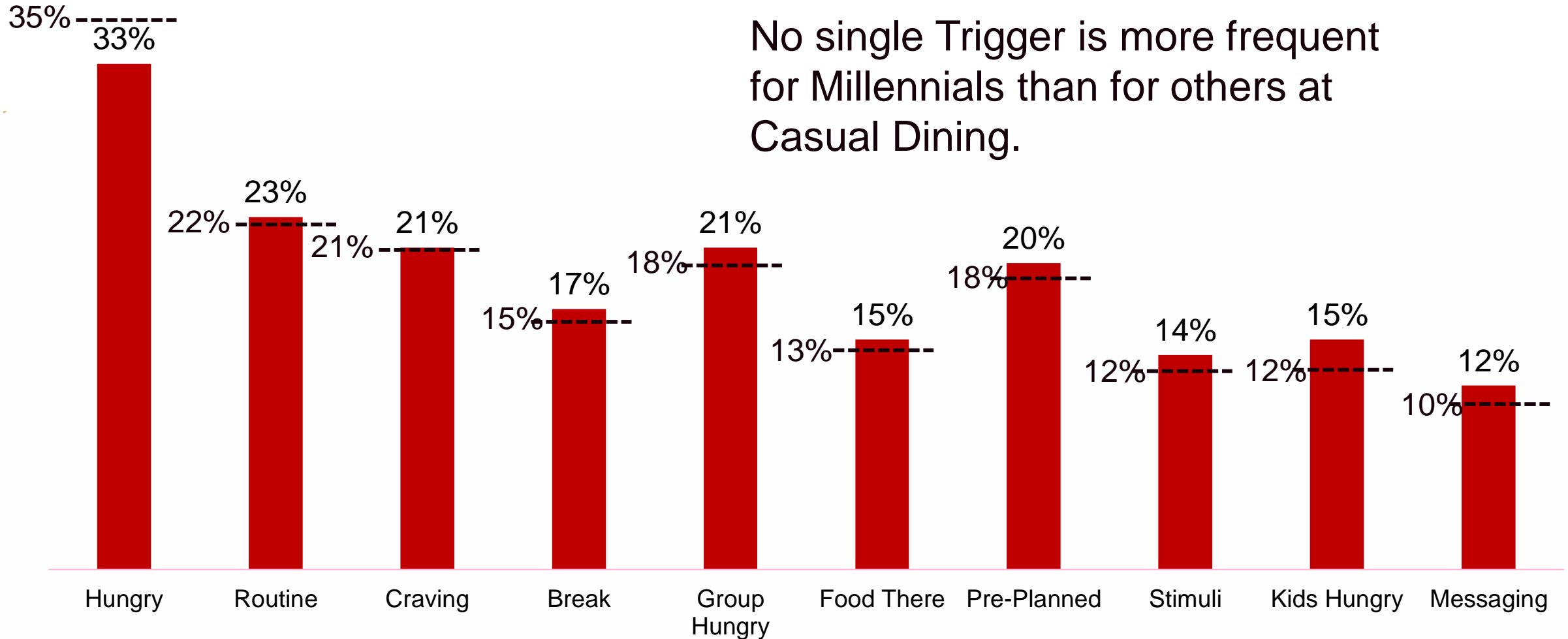
Casual Dining: Millennial Time of Day



Millennials are more likely than others to use Casual Dining for morning and late night meals.

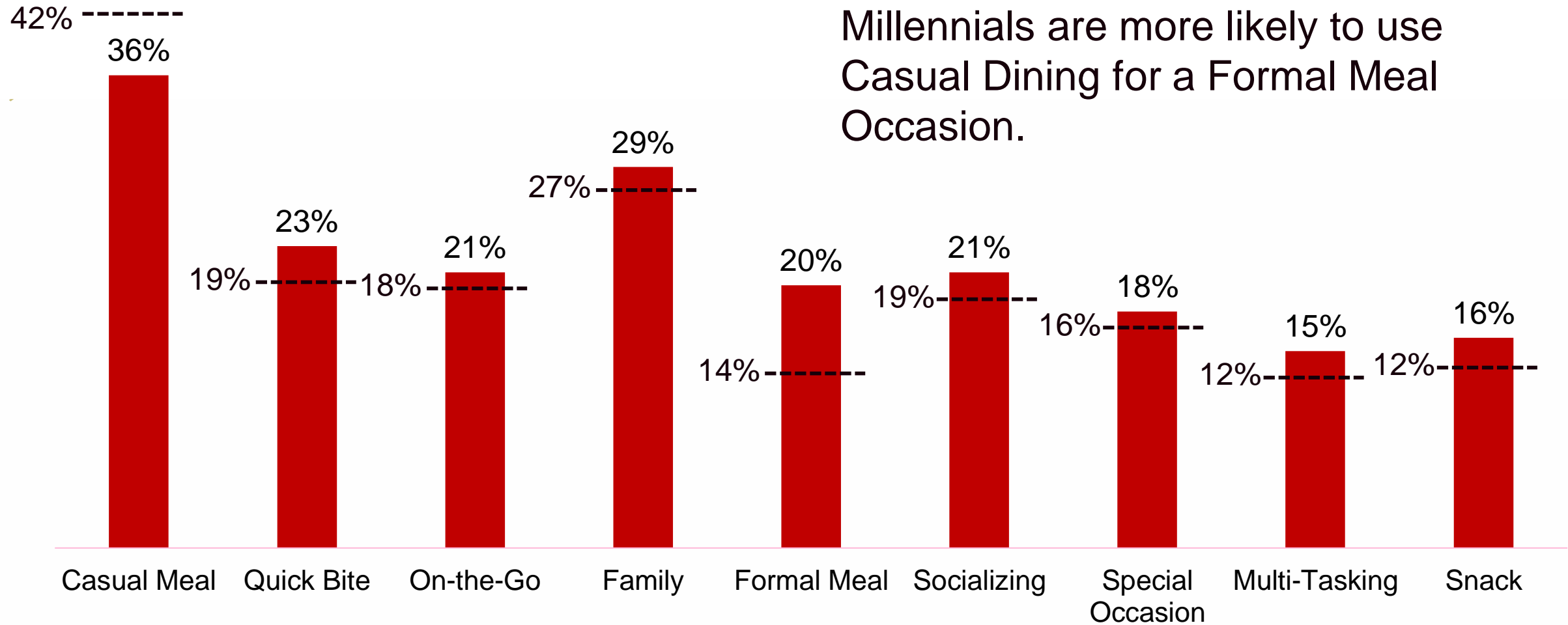
Source: IFMA ScopeSM

Casual Dining: Millennial Eating Triggers



Source: IFMA ScopeSM

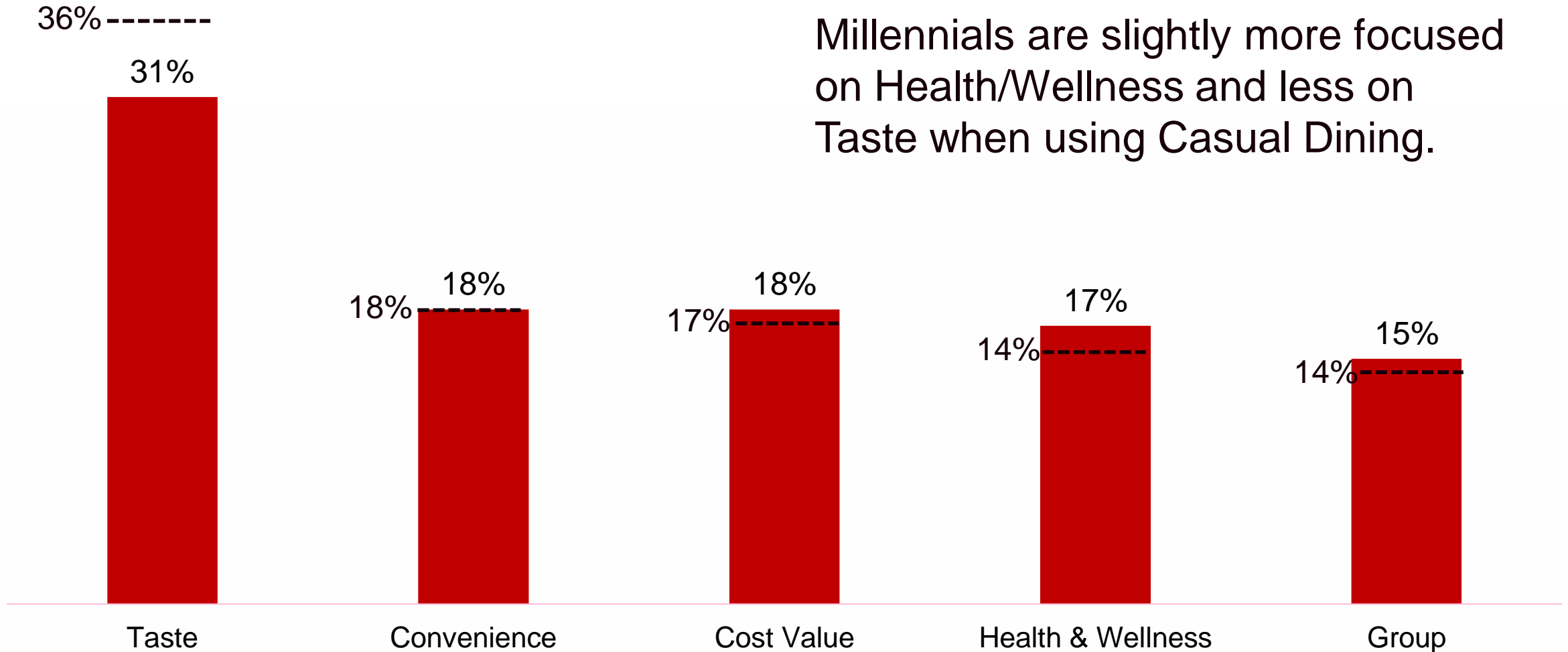
Casual Dining: Millennial Eating Occasion



Source: IFMA ScopeSM

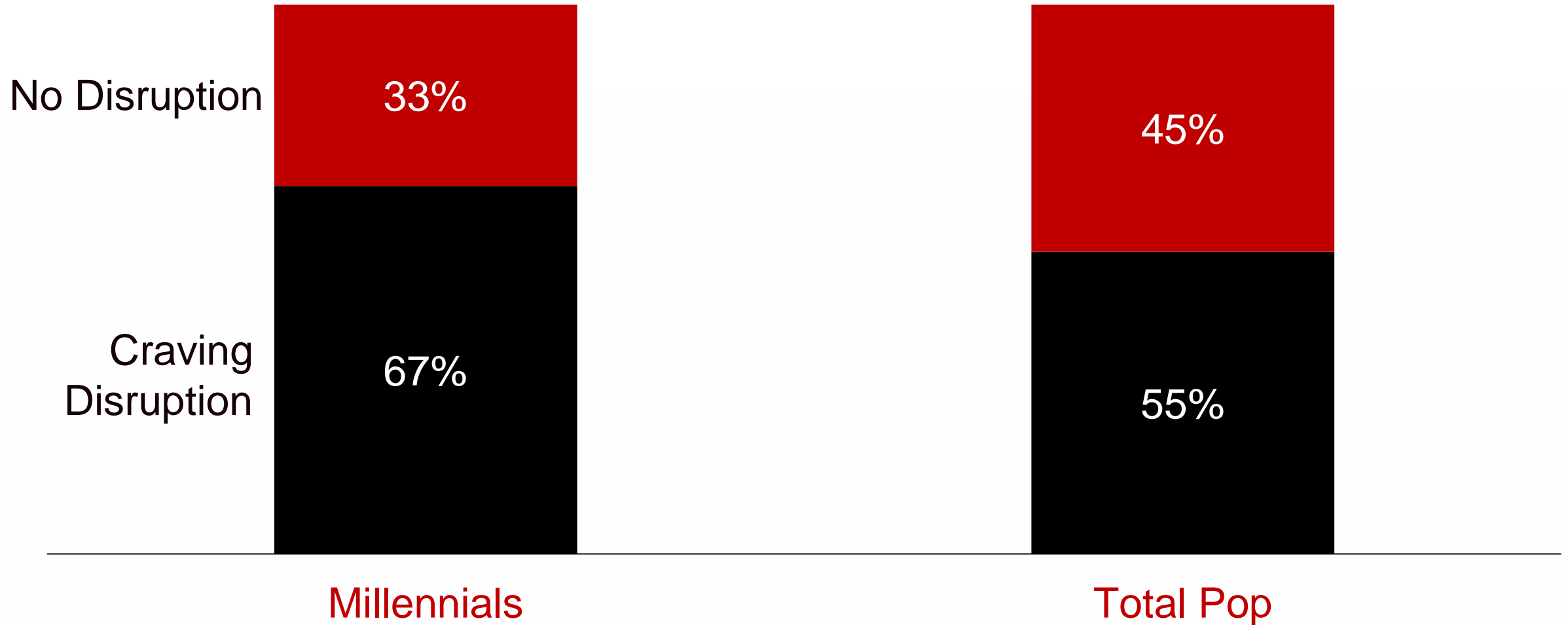
Casual Dining: Millennial Mega Needs

Millennials are slightly more focused on Health/Wellness and less on Taste when using Casual Dining.



Source: IFMA ScopeSM

Casual Dining: Craving Disruptions



Millennials and Casual Dining

2. A strategic Casual Dining customer has reached out to your company. They are having a hard time being relevant to Millennials and have asked for your help.
1. Millennials are less likely to eat at the Casual Dining restaurant.
2. Instead, Millennials are more likely to use a Delivery Service.
3. Millennials are more likely to use Casual Dining for non-traditional meals, like Morning and Late Night.
4. A Casual Meal might be seen as a Formal Meal for some Millennials.
5. Cravings are a significant disruptor when Millennials use Casual Dining.

CFJ: Access for IFMA Members

Standard Access

Operator Landscape

Go to Market

Triggers in Consumer Food Journey

Enhanced Access (\$2,999 annually)

Occasions

Needs

Decisions

PPT Download

Demographic Filters

Upcoming and Past IFMA Webinars

- Business & Industry Segment: March 27 @ 11:00AM Central Time
- Large Restaurant Chains: April 2nd @ 2:00PM Central Time
- COVID-19 and the Consumer: April 3rd @ 2:00PM Central Time

Register at [IFMAworld.com](https://www.ifmaworld.com) under the Events tab.

- Healthcare, K-12, and Small/Midsize Chains: Recordings available at [IFMAworld.com/resources](https://www.ifmaworld.com/resources)