

Disruptive Opportunities in the Consumer Food Journey

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The word “disruption” evokes something that almost sounds violent. Merriam-Webster defines disruption as *a break or interruption in the normal course or continuation of some activity, process*. Interruption replaces normality. The straight course of activity is thrown into chaos. However, out of the chaos of disruption can come the opportunity for brand growth.

Each meal occasion, no matter how insignificant, has the possibility of being disrupted. Disrupting a consumer’s decision making is not easy, but if accomplished, can reap rewards for a brand. This is particularly true in the case of a consumer selecting the source of their next meal occasion. Consumers have many options at their disposal, especially when they are at home. They can make themselves a meal using on hand supplies, reheat leftovers, drive to a foodservice location, or order for delivery. Regardless of the decision they end up making, the foodservice marketer wants to influence that decision and, in a best-case scenario, ultimately change it in favor of their brand or product.

At its core, disruption – or how to disrupt– is at the center of the IFMA Consumer Food Journey™, the food industry’s most comprehensive study and tool that identifies how consumers make a food and beverage purchase decision – whether at home or away from home. Since 2019, in conjunction with IFMA’s research partner, Datassential, more than 30,000 consumers have been surveyed – nearly 1,000 each month – to understand their purchase decisions. After years of research, it’s clear that the role of cravings serves as a main disruptor of consumers’ meal sourcing decisions.

Each survey asks the consumer about their most recent meal occasion, including one question that asks, “Sometimes, we start out wanting something, but a CRAVING comes along and causes us to make a different choice. Did this happen to you where you had one goal and you ended up deciding on something else?” This simple question delivers invaluable insight for foodservice marketers across the value chain.

To focus on occasions that can be disrupted, marketers must learn when and who to message to influence the final decision. The IFMA Consumer Food Journey helps identify that segmentation, where of all occasions regardless of source, 36% are disrupted by a craving. The balance of occasions follow the path originally chosen by the consumer. Therefore, marketers are left to influence just over 1 in 3 occasions.

Not all consumers have the same propensity for a craving disruption. Table A below shows that cravings disrupt almost half of both Gen Z and Millennials occasions, making them a ripe target for messaging that could make them change their mind. These two generations are also most prone to being on their phone, so reaching them through a push notification or a social media post could prove to be a low-cost, but highly effective marketing tool.

Table A	Total	Gen Z	Millennial	Gen X	Boomer
Disrupted by a Craving	36%	44%	45%	36%	23%
Not Disrupted by a Craving	64%	56%	55%	64%	77%

Restaurant occasions are more likely to meet the demand from craving occasions than when a consumer uses food and beverages that they purchased at a traditional grocery store. Table B below shows that a craving disrupted over half of Fast Casual occasions.

Table B	Total	QSR	Fast Casual	Midscale	Casual Dining	Traditional Grocery Store
Disrupted by a Craving	36%	49%	56%	55%	48%	26%
Not Disrupted by a Craving	64%	51%	44%	45%	52%	74%

On the flip side, occasions sourced from a traditional grocery store were only disrupted 26% of the time. At first glance, this looks like a massive opportunity for restaurants, especially for the Fast Casual segment. However, the IFMA Consumer Food Journey also tells us that traditional grocery stores account for 52% of total meal occasions while Fast Casual is only used 15% of the time.

This disparity in usage, however, should not discourage the foodservice marketer. On the contrary, this smaller target allows the marketer to be more surgical in their targeting. Understanding that consumers, who have grocery store bought food on hand, are less likely to change their minds on where to source their next food and beverage occasion, marketers can focus on consumers whose refrigerator is bare, are away from home, or are just not in the mood to prepare something for themselves.

Reaching consumers at just the right time to influence their decision is likely the most important step in making them eventually switch their plan and choose a different brand. The IFMA Consumer Food Journey tells us occasions triggered by a message or ad are disrupted by a craving a whopping 67% of the time. This message or ad can come in a variety of forms, such as a notification or a social media post. The message should be targeted and contain a visual of the craveable item. Additionally, it should be easily shared through text or social media. Obviously, this type of targeted messaging requires a brand to have access to the consumer's phone, either through a loyalty program, or by having the consumer follow that brand on social media.

Starbucks is a master at leveraging a loyalty program and social media to intercept a consumer's decision-making process with a craveable message. Starbucks has 17.7 million Instagram followers worldwide (In comparison, McDonald's has 4.2 million) and My Starbucks Rewards is a mainstay on many consumers' phones. Any brand that has craveable items should consider looking at the Starbucks model and emulating their disruptive marketing tactics.

In summary, the IFMA Consumer Food Journey offers the food and beverage marketer the opportunity to better disrupt consumers' decision-making process through consumer segmentation. This segmentation involves separating their potential consumer base into consumers that are easily disrupted and those that are less likely to change their minds. Once a brand has identified the consumers it wants to disrupt, targeted messaging full of craveable items should be loaded and dispersed at key times throughout the day when the targeted consumer is most likely to be looking for a meal.

To learn more about the IFMA Consumer Food Journey and its applications, contact Charlie McConnell (charlie@ifmaworld.com), IFMA's Sr. Director of Insights and Best Practices.

The International Foodservice Manufacturers Association (IFMA) is an established trade association serving foodservice manufacturers for 70 years to improve industry practices and relationships while equipping every foodservice manufacturer with the tools to navigate their future with confidence. By providing insights, developing best practices and fostering connectivity through events, we enlighten members and motivate change that leads to betterment for the individual member organization and the industry at large. For more information, visit IFMAworld.com.