

PROBLEM:
"DINNER IS A CHORE AT THE END OF THE DAY WHEN I AM REALLY TIRED, SO I USUALLY FEEL LIKE SCREAMING. MORE DEMANDS ON ME (MAKE DINNER, SERVE, CLEAN)."

Editor's Note:
This is the first of a three-part series investigating the challenges and opportunities of supermarket prepared food programs.

Getting Grocery Prepared on the Dinner Menu

Understand consumer struggles and use social media tools to present meal solutions. **By Joan Driggs**



T

he gamut of emotions evoked in relation to planning the evening meal is as varied as the menu at Applebee's, according to new research into consumers' approach to prepared food purchases for dinner. This complexity might be what's keeping retailers from trying

to connect with consumers, but it also means that grocery retail doesn't rank as high as restaurants and pizza delivery when consumers are looking for quick dinner solutions.

Tyson Foods recently commissioned quantitative and qualitative research conducted by research firm Carbonview, a sister company of *Progressive Grocer*. The "On-the-Go Dinner" studies provide insight into how consumers determine what's for dinner, where they buy and what's taken into consideration when making these decisions. This article also features findings from Tyson's 2014 "Prepared Foods Attitudes and Usage Study," referred to henceforward as the A&U study.

Grocery Lags Behind Restaurants as Dinner Solution

When considering the evening meal, most consumers' first option is to cook a meal. But what happens when the evening meal doesn't come together as planned? More than 70 percent of respondents to Tyson's "On-the-Go Dinner" research indicate that they face unplanned meals once a week or more often, with one-third of respondents saying this happens two or three times per week.

Where grocery retail is the go-to for a planned meal, just 5.3 percent of more than 6,000 respondents to the "On-the-Go Dinner" survey say that they plan on purchasing prepared foods from the grocery store for an evening meal over the course of the next few days. Besting supermarkets for planned meal purchases are quick-service restaurants (QSRs) and pizza delivery or carryout.

Analysis of the past 10 purchases of prepared foods for dinner is similar, with grocery retail slightly ahead of fast-casual restaurants such as Panera and Chipotle. This is despite findings from the A&U pre-shop survey, in which 79 percent of respondents agreed with the statement "Buying prepared foods from grocery stores saves me a lot of time."

In the A&U survey, consumers identified quality (81 percent) and freshness of food (80 percent) as key drivers of a grocery store prepared food purchase, indicating that consumers are generally satisfied with the items they've previously purchased. Yet grocery prepared deli doesn't surface as an unaided top-of-mind solution for consumers looking for a good meal.

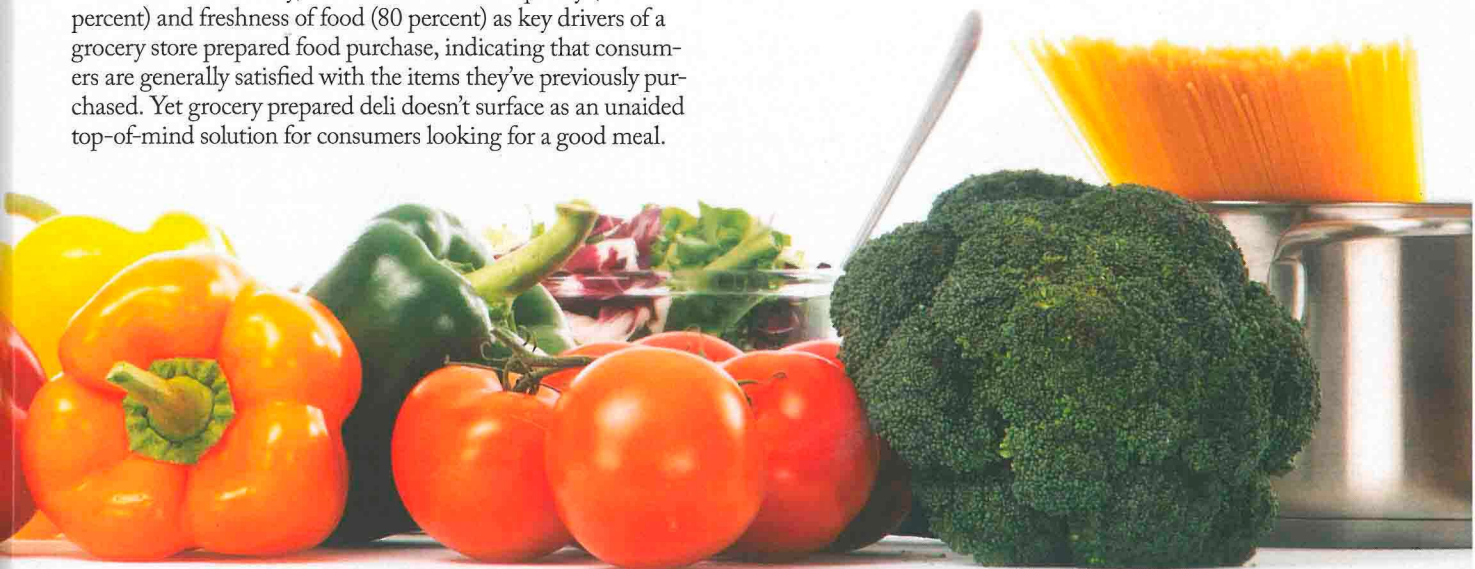
Q: Of the last 10 times you purchased these prepared food items for a dinner or evening meal, how many of those purchases would you estimate are from each of the following establishment types?

Quick-service restaurant such as McDonald's, Subway, Wendy's, Taco Bell, etc.	27.2%
Pizza delivery or carryout from a pizza restaurant such as Domino's, Pizza Hut, Papa John's, etc.	20.1%
Deli or prepared food section of a grocery store such as Safeway, Kroger, Walmart Supercenter, SuperTarget, etc.	19.6%
Fast-casual restaurant such as Panera, Five Guys, Chipotle, Panda Express, Boston Market, etc.	15.5%
Convenience store such as 7-Eleven, Circle K, QuikTrip, RaceTrac, Wawa, etc.	4.7%
Other	12.9%

Note: (Analysis multiplied by 10 in the main tables for "share" of 10 times)

Source: "Tyson On-the-Go Foodservice Study 2014." Total Respondents, N=6,009

This might be attributable in part to how grocery retail promotes prepared foods. ECRM, a Solon, Ohio-based provider of promotional data and business intelligence, reviewed ad counts of representative markets over the six months ending Jan. 14, 2015, and found that 20 percent of prepared food promotions were promoted within a meal deal, indicating that most (80 percent) prepared items were promoted as standalones. This suggests that retailers aren't committed to total meal solutions.



Print and digital prepared food promotions reviewed by *PG* show grocery retail is focused on pricing, mostly by the pound. For instance, Chef's Kitchen Chicken Caesar Salad for \$5.99 a pound speaks more to value than appeal, and when was the last time someone said, "Let's split a pound of Caesar salad for dinner tonight"?

As another example, a grocery ad for "Signature Pot Pie, \$4.99" lacks meaningful descriptors. Meanwhile, a restaurant's version, "Chunks of chicken breast in a rich broth, with carrots and peas, topped with a savory oregano-pastry crust," paints a mouthwatering picture.

"From picking the right produce to how we bake our breads, these are the stories that define our commitment to the craft." Ah, a company that "gets it"! The quote is from Panera, which reigns supreme in the fast-casual realm and successfully markets products as "filling, wholesome meal[s]."

In grocery, the website for burgeoning Chicago-area chain Mariano's Fresh Market promotes "Perfect meals in minutes — all you have to do is choose." There's a "design your meal" banner touting affordable fare "made fresh daily by our culinary team. Take home to heat or microwave in our store & enjoy!" But the site fails to show what the options are from day to day. The retailer uses Instagram, Pinterest, Twitter and Facebook, but not to promote meal solutions to consumers when they're most in need of help.

SOLUTION:
 RETAILERS MUST
 DO A BETTER JOB
 PROMOTING THEIR
 PRODUCTS.

Dinner Purchase Triggers

"On-the-Go Dinner" participants had mixed perceptions regarding the evening meal: At its best, dinner is a time to relax, connect with others and enjoy eating a delicious meal together. At its worst, dinner is yet another chore for the day — one that's time-consuming to plan for, prep and clean up after.

On par with the physical need for dinner is the emotional pull, perhaps the strongest of any meal occasion:

"This is how I generally feel about dinner: excited! To me, dinner is a time to unwind from a busy day and focus on my son and spending time with him. I also love a good home-cooked meal!" reports a participant in the qualitative study.

Not everyone views dinner through the same gravy-colored glasses, though. "Dinner is a chore at the end of the day when I am really tired, so I usually feel like screaming. More demands on me (make dinner, serve, clean)."



Q: Generally speaking, what triggers your decision to purchase prepared food for the dinner/evening meal?

I don't feel like cooking	64.0%
I'm running late and need a dinner that's ready quickly	37.6%
I realize I'm hungry and find someplace to stop	23.5%
I planned to purchase prepared foods earlier in the day	21.6%
I am buying a few specific items and also decide to buy prepared foods	17.2%
Someone asks me to stop to buy something	16.9%
I buy prepared foods as part of a larger shopping trip	15.9%
Someone in the household has an afternoon or evening meeting, practice, event, etc., that I have to schedule dinner around	15.0%
I just got paid	14.9%
I planned to purchase prepared foods earlier in the week	14.6%
It's part of my normal routine	13.9%
There's a special event that I want to make feel special	9.3%
Other	3.5%

Source: "Tyson On-the-Go Foodservice Study 2014." Total Respondents, N=6,009

More than 40 percent of respondents to the "On-the-Go Dinner" survey say that they start thinking about dinner options during the day and make a plan before it's time to start preparations. Just 15 percent have a plan in place, and more than half of this group adjusts based on triggers, such as a change in schedule, weather, available time or energy, appetite, mood, or available ingredients.

Most retailers aren't exercising any pre-shop day-of-marketing; even the channels they're using aren't effective at promoting prepared foods. If circulars are an indication, retailers are actually losing ground in the prepared food arena, according to Market Track, a promotion and pricing intelligence firm. From 2013 to 2014, retailers shifted prepared items off the front page of circulars to the back, and also increased prices of prepared foods by 7 percent. The Chicago-based firm reports that

Continued on page 86 ▶



► Continued from page 82 circular promotions for eat-in/takeout foods decreased 5.3 percent from 2013 to 2014, but more specifically, the category saw a decrease of 29.7 percent in front-page circular promotions. These were reallocated to the back page, which saw an increase of 21 percent.

“Despite the increase to promoted price, retailers did offer promotional overlays, such as dollars or a percentage off on a higher percentage of eat-in/takeout food promotions in 2014

(70.4 percent) than in 2013 (67.4 percent),” notes Ryne Misso, marketing analyst for Market Track. “This is a counterpoint to the [shift in circular placement], as it is Market Track’s point of view that promotional overlays help drive traffic, not hurt.”

The instances where retailers are promoting prepared foods across multiple channels are few and far between. Standard Market, an upscale two-store chain in the Chicago suburbs, is an exception, featuring “What’s For Dinner Tonight” in its website, Facebook and Twitter posts: “Every dish is made entirely by our chefs in house, using fresh ingredients. One bag contains a generous meal for two, or bring home a couple for a family dinner!”

Price Chopper, a large Northeast chain based in Schenectady, N.Y., successfully maintains its value proposition with weekly Meal Deals, while also employing emotional sentiments: “No time to cook or watching your budget? Stop by Price Chopper and pick up a Meal Deal.” The chain also uses menu-worthy descriptors, including a “crispy, juicy family feast that serves 3-4 people with two breasts, 2 thighs, 2 wings and 2 legs. Add 6 fresh-baked, old-fashioned Southern Style Biscuits for \$2 more!”

Posting the week’s offerings also plants a seed for consumers who are caught off-guard at dinner-time or simply want to build prepared foods into their weekly meal planning.

Anxiety about meal planning is likely heightened when shoppers consider the “decision influencers,” including children (70 percent of respondents) and spouses (nearly 50 percent). Nearly three in 10 indicate that picky eaters in their households influence prepared food purchase decisions.

Noted one survey participant: “I have three kids, so the reality of dinner in my house can be a lot of complaining about the food served, begging and negotiating for other foods for and with dinner, refusing or making up excuses not to eat the dinner served, or just quiet and happy (usually because I have asked them what they want to eat and they have helped plan the meal).”

There’s a “fear of failure” among participants, who indicate that they like to have a variety of dinner options, but that it proves challenging to please everyone.

Get a Seat at the Dinner Table

Mobile apps, billboards, text alerts and social media, including Facebook, Twitter and Instagram, are recognized by fewer than 10 percent of consumers as influencing their decision to visit a specific grocery store, mostly because the majority of retailers aren’t using these mediums to promote prepared foods. Standard Market and Price Chopper, however, reach consumers pre-shop via ad circulars, as well as digital and social media. Further, these pre-shop initiatives mirror in-store efforts.

Retailers looking to attract the majority of consumers who make infrequent trips with the intention of purchasing prepared foods should be using social media as a way to connect with consumers when they’re thinking about dinner — increasing messaging during the afternoon. Messages should address the many feelings consumers have about the evening meal, as well as alleviate barriers to purchase:

- Ease: not having to cook, little prep, less mess to clean
- Saves time: a way of recapturing lost time; available at the same store where you purchase other items
- Ability to eat whatever you’re in the mood for; satisfy many appetites; a treat
- Emergency backup plan when schedules change
- Offers a solution when participants don’t have a plan; a relief
- If applicable, promote dedicated checkstands that speed transactions

Consumers recognize that retailers do a good job of addressing the physical needs of dinner, including tasty, healthy, affordable and easy-to-use products. But until retailers also address emotional triggers and communicate in real time with consumers in need of support and reassurance, their prepared offerings won’t make it to the dinner table. **PG**

SOLUTION:
 RETAILERS LOOKING TO ATTRACT THE MAJORITY OF CONSUMERS WHO MAKE INFREQUENT TRIPS WITH THE INTENTION OF PURCHASING PREPARED FOODS SHOULD BE USING SOCIAL MEDIA AS A WAY TO CONNECT WITH CONSUMERS ...

For more information on Tyson’s “On-the-Go Dinner” research, visit Progressivegrocer.com/deliinsights.