

Exclusive Report: Pinpointing Patterns

by Steve Brooks

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Understanding behavior is key for meeting the deli needs of mothers.

Moms are the queens of the supermarket deli.

Mothers control the purse strings for 80 percent of the average family's purchases and spend \$1.6 trillion annually on consumer goods and services, reports BSM Media, a Fort Lauderdale, Fla.-based marketing firm that focuses on moms.

That makes them the prime buyers of meats, cheeses and prepared foods—and the key customers for most supermarket delis.

Yet, attracting more moms to the deli—and ensuring they remain loyal to specific outlets—requires that merchandisers meet the unique needs of each customer segment. Fortunately, a plethora of research on the mom sector is making it easier for operators to decipher their desires.

For instance, studies show that simplification is among the chief objectives of mothers. In a 2006 survey of 1,110 moms by Yankelovich Inc., a Chapel Hill, N.C.-based consumer research firm, 82 percent of respondents agreed with the statement, "I need to find ways of reducing the stress in my life." Many of those mothers work fulltime in addition to doing the family shopping and carting their kids to and from school and other activities.

Indeed, working moms comprise 71 percent of the 37.1 million mothers with children under 18, according to the U.S. Bureau of Labor Statistics.

A vast sector of moms with children under 18	
Total Mothers:	37.1 million
Working mothers:	26.2 million
Married mothers:	26.7 million
Unmarried mothers:	10.4 million
Source: U.S. Bureau of Labor Statistics	

Top mom motivators for visiting supermarket delis	
ELEMENT	PERCENT
Price	29%
Convenience	22%
Service	9%
Nutritional possibilities	8%
Speed	7%
Signage and product posters	4%
Activities for kids	2%
Other	19%
Source: MarketTools online survey of 171 moms, January 2008	

What it takes to be a great mom	
ELEMENT	MOMS WHO AGREE
Her family eats dinner together every night	77%
Is always up-to-date on the latest health issues	74%
Keeps her kids from getting overweight	74%
Strictly monitors the amount and type of snacks her children eat	66%
Source: Yankelovich MONITOR, April 2006 survey of 1,110 moms	

Moms—in the face of growing childhood obesity—also are giving more thought to what they feed their children. And many still cling to the tradition of getting the family together once a day around the dining table.

Food, to them, still equals love.

Yet, the frequency of home cooking is declining, according to GfK Roper Consulting, a New York-based public opinion firm.

In a September 2007 phone poll of 1,000 adults, 44 percent of female respondents said they cook a full meal at home daily, compared to the 50 percent

who reported doing so in a similar survey a year earlier.

In addition, those preparing the meal just a couple of times a month jumped from 2 percent to 6 percent, the survey found.

But research shows that many mothers still say the family dinner is vital, even if it doesn't include slaving over a stove. Seventy seven percent of respondents to the Yankelovich survey, for instance, agreed that a characteristic of a great mom is that "her family eats dinner together every night." Such findings reveal that deli operators are more likely to attract and retain customers if they make it easier for mothers to serve meals.

Indeed, in a 2004 Yankelovich survey, 69 percent of respondents cited ease of preparation as having a strong influence on their food choices, up from 54 percent in 1996.

In addition, 53 percent noted that resealable food packaging had a strong influence on their buying behavior, up from 28 percent in 1996.

Such research reinforces the notion that people are very time pressed, says Kathy Sheehan, GfK Roper senior vice president.

"Mothers are continually on the lookout for convenience foods," she notes. "It's a great opportunity for delis." Retailers that are able to solve multiple food-related problems at once—such as enabling mothers to spend less time cooking while making it easier for their families to eat together—will appeal to even more shoppers, says Kelley Styring, a consumer strategist with Newberg, Ore.-based consulting firm InsightFarm Inc.

Styring exemplifies that interest in convenience by taking her family each week to a Fred Meyer supermarket for sandwiches. On such occasions, she picks up her two kids, ages 8 and 12, from school and they visit the deli counter to buy their favorite cold cuts.

"The choices are infinite and it's something the family looks forward to," Styring says. "It's powerful when a physical and emotional solution come together." John Page, Yankelovich research director, agrees that dinner for a typical mother is about feelings as much as food.

"It's the connection the family has through dinnertime conversation," he says.

Key food purchasing motivators		
	2004	1996
Easy to prepare	69%	54%
Resealable packaging	53%	28%
Easy-to-open packaging	36%	13%
Individual portion sized packaging	28%	12%

Source: Yankelovich MONITOR, April 2006 survey of 1,110 moms.

Why organic foods appeal to moms		
	PARENTS	ALL CONSUMERS
Because they're safer	55%	42%
Because they're better for the environment	39%	28%
Because they're better for children	51%	25%
Because they're better tasting	38%	30%

Source: GfK Roper Consulting, September 2006 telephone survey of 1,000 adults

The nutritional data moms check		
	MOMS	ALL SHOPPERS
Fat content	53.0%	50.4%
Carbohydrate content	44.9%	37.1%
Sodium content	42.7%	41.6%
Portion size	41.2%	37.1%
Number of calories	41.7%	41.6%

Source: GfK Roper Reports, September 2007 telephone survey of 1,000 grocery shoppers

Delis can promote that connection by displaying signs that depict families eating together. Such displays give moms the perception of an additional benefit from shopping in the department, Page states.

Merchandisers, meanwhile, can respond to moms' need for convenience by marketing prepared meals in the deli at discount prices, analysts note.

From the mouths of moms: candid comments on the deli counter

MarketTools Inc., a San Francisco-based consumer research firm, operates the Moms Insight Community, an online system on which 10,000 mothers share opinions and detail their experiences. A January question about the likes and dislikes of supermarket delis drew 171 responses. Below is a sample of the messages:

Convenience:

"I hate the wait! I normally have to wait fifteen to twenty minutes because they only have one person working behind the counter and the people in front of me never seem to know exactly what they want—even though they have been standing in line forever."

"I shop at our local ShopRite deli and they have the kiosk touch-screen ordering process...I love it...I place my order and get an order number. I shop for thirty minutes and I come back to find my order in a numbered paper bag ready for pick up...no waiting."

Personal service:

"I like that when I ask for a particular thickness or thinness of a meat or cheese, they will slice a piece and hold it up and ask me if it is sliced the way I wanted."

Freshness:

"I don't usually buy the salads because most are not actually made at the store." "I don't like "pre-packaged" meat—getting it freshly cut is better and fresher."

Price:

"If deli meats were cheaper I would buy them more often. Normally our grocery store has different deli meat on sale every week. So, if I like the one on sale, that is what we have. Otherwise we have tuna, peanut butter and jelly or something else for lunch." "We usually buy our lunch meats at the wholesale club. Same quality, but the cost is much lower. I can get two pounds of cheese for the price of one at the supermarket!"

Randy Irion, director of retail marketing for the Centennial, Col.- based National Cattlemen's Beef Association (NCBA), for instance, says dinners might include a pot roast with onions, gravy and a side dish of potatoes.

Other easy-to-prepare alternatives are pork tenderloin or rotisserie pork roast, notes John Green, director of strategic marketing for the Clive, Iowa-based National Pork Board.

"One of our target demographics is women with kids under 18 who are part of a dual-income family and time-starved," he states.

Besides streamlining meal preparation, delis also can better serve busy moms by displaying recipes at the full-service counter and merchandising products with other supermarket departments, says Bridget Brennan, chief executive officer of Female Factor Corp., a Chicago-based female marketing consulting firm.

In addition, operators can attract more mothers by providing nutritional data and options, analysts say. Indeed, 74 percent of mothers told Yankelovich that they agreed with the statements that a great mom, "Is always up-to-date on the latest health issues," and, "Keeps her kids from getting overweight." "Mom is basically the chief health officer of the household," says Mary Dean, president of KickSkirt

Inc., an Austin, Texas-based women's marketing agency.

"Moms want to feed their kids in the most healthy way possible and are quicker than the average dad to look at nutritional values." The GfK Roper poll found that mothers also were 21 percent more likely than the typical shopper to check the carbohydrate content on food labels, 11 percent more likely to study portion size and 5 percent more likely to consider fat content.

Labeling elements that influence moms' purchases	
FACTOR	RATED AS IMPORTANT
Easy to read freshness dating	58%
Easy to prepare	56%
Informative and easy-to-read nutrition labels	49%
Fortified with extra vitamins or nutrients	42%
Health organization seal of approval	37%
My kids can prepare it on their own	33%

Source: Yankelovich MONITOR, 2007 survey of 395 moms.

Mothers in the 2006 Yankelovich survey, meanwhile, listed expiration date as their top health data concern. Also important was access to detailed nutrition labels, followed by information on whether there are extra vitamins or nutrients in products and if the items are approved by such health organizations as the U. S. Food and Drug Administration and the American Heart Association.

Moms are impulse buyers—Percentage of moms who strongly agree that...	
I make a list before going shopping and never deviate from that list	19.7%
I always like to experiment and try new things with these types of products	32.8%
I usually specify the brand of these products when I make up my shopping list	24.9%
I don't decide which brand to buy until I'm there	35.9%
I always research products and brands before I go shopping	17.0%
I have bought new products or brands simply because the packaging or display caught my eye	32.7%
I always buy the same brand unless there is a really good deal on another brand	41.5%
I always buy the same brand unless I see something new and different	29.2%

Source: Yankelovich MONITOR, April 2006 survey of 1,110 moms

Delis have an advantage over many other supermarket departments in attracting

such nutrition-conscious consumers because most mothers perceive fresh items as being healthier and better tasting than packaged foods, analysts say.

“Many shoppers have the perception that pre-packaged meats sit in the container forever and have tons of chemicals and preservatives,” notes Emily Morris, director of product marketing for Market-Tools Inc., a San Francisco-based consumer research firm and the moderator of an online community of 10,000 moms.

Yet, it still is important for stores to prominently display the ingredients in the fresh items to assure shoppers that they are preservative-free, she states.

“Most delis usually don’t provide that information,” Morris says.

Delis also can appeal to health-oriented moms by marketing more organic proteins, Sheehan states.

Indeed, a 2006 GfK Roper telephone survey of 1,000 adults found that 31 percent of parents buy organic products on a weekly basis, compared to 23 percent of all shoppers.

The parents cited food safety as the leading motivator. In addition to embracing healthy choices, moms also are not afraid to try new products, research confirms.

Yankelovich, for instance, found that only 19.7 percent of mothers stick to their shopping lists, while 32.8 percent like to experiment.

In addition, 35.9 percent of mothers don’t decide what brands to purchase until they are in the store, and 32.7 percent indicated they would try a new brand solely because they like its packaging or display, Yankelovich found.

While this flexibility in considering a variety of fresh foods makes moms attractive customers for savvy merchandisers, many still are resistant to some deli elements— including potentially long waits at the service counter.

In a MarketTools online survey, for instance, only 9 percent of respondents listed service as their top motivator for deli shopping.

In addition, 8 percent complained about slow service and waits as long as 20 minutes.

Moms, however, gave positive feedback to such newer deli technologies as automated touch-screen ordering systems. Those devices enable shoppers to bypass service counter lines by electronically placing orders, and then retrieving the items when they are ready to checkout.

“The delis that can deliver products that meet moms’ needs for convenience, taste and nutrition will win in the marketplace,” Styring states.

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