Consumer Shopping Dynamics:
THE DECISION TREE

INTERNATIONAL DAIRY-DELI-BAKERY ASSOCIATION™
636 Science Drive, Madison, WI 53711-1073
P.O. Box 5528, Madison, WI 53705-0528
Phone: 608-310-5000; Fax: 608-238-6330
E-Mail: iddba@iddba.org; Web Site: www.iddba.org

International Dairy·Deli·Bakery Association™
636 Science Drive, Madison, WI 53711-1073
P.O. Box 5528, Madison, WI 53705-0528

Phone: 608-310-5000
Fax: 608-238-6330
E-mail: iddba@iddba.org
Web site: www.iddba.org

Consumer Shopping Dynamics: The Decision Tree

A special report prepared for the IDDBA by Datassential

Single copy price: IDDBA Member. $395
Non-member. $795

ISBN 978-0-9824603-9-9

Consumer Shopping Dynamics: The Decision Tree
Table of Contents

Consumer Shopping Dynamics: The Decision Tree
Figures and Tables

Consumer Shopping Dynamics: The Decision Tree
Figures and Tables

Consumer Shopping Dynamics: The Decision Tree
Figures and Tables

Editor's Note: This summary provides insight into the scope of the full study. A few selected tables are included to give you an idea as to the depth and breadth of the full report. The study is available for purchase ($395 for IDDBA Members; $795 for Non-members). Order online at www.iddba.org or call us at 608-310-5000.

Consumer Shopping Dynamics: The Decision Tree

Chapter 1. Executive Summary

1 Executive Summary *(excerpts from Chapter 1)*

The landscape of retailers in competition for consumers' grocery dollars has skyrocketed in recent years and many vendors outside of traditional grocery channels are aggressively bidding for market share as well. These developments have worked in tandem to compel shoppers to modify how, when, where, and why they make their food and beverage purchasing decisions. As such, it has become common for shoppers to patronize multiple sources in their quest to fulfill their varied and evolving grocery needs.

In light of these emergent circumstances, this study seeks to get into the minds of supermarket deli and bakery department consumers to explore their shopping influences, preferences, motivations, emotions, and purchase drivers.

The study has gone beyond virtual stores and purchase data to create research using shop-alongs and intercepts (in-depth one-on-one interviews) with shoppers as they make real world "in the basket" shopping decisions. This methodology has allowed us to generate meaningful insight into the shopper mentality, beliefs, and attitudes by collecting feedback in real-time, as they browse the deli or bakery department of actual stores. This method has also made it possible to explore differing consumer types that frequent the deli and bakery departments, including both browsers and buyers.

The aim of conducting live shopper interviews was to provide accurate and highly-relevant inputs for the quantitative portion of the research, with the ultimate goal of providing a clear understanding of consumer purchase decision-making in the deli and bakery departments through the development of detailed Consumer Decision Tree (CDT) models.

With comprehensive CDTs, we can map the key thoughts and decision criteria consumers face while they shop, thereby allowing us to compare and analyze the contrasting levels of purchase likelihood given varying market conditions. We can then identify the critical influence points and purchase triggers that most warrant retailer consideration.

Ultimately, this study explores consumer attitudes and factors which alter purchasing decisions. It is designed to provide tips on how best to consider trigger points and purchase influencers in developing a comprehensive marketing strategy for future growth.

1.1 Decisions, Decisions . . . Where to Begin?

We start by outlining the foundations of grocery shopper activity overall and explore the fundamental decisions made by consumers which eventually bring them through the supermarket doors:

Where – With so many outlets available for grocery purchases, consumers must decide on store type (traditional supermarket or discounter?), affiliation (chain or independent?), and location (close to home or close to work?).

Who – Many households have shared responsibility for grocery shopping, so who is actually making the trip? Is this a solo endeavor or a family activity?

When – Consumers have hectic schedules, but they also have specific ideas about when it's best to shop (when are deliveries made? when are lines shortest?), ensuring an optimal experience.

How – Once at the store, different shoppers have different methods (do they always move between departments in the same order?) and inclinations (are they mostly driven by convenience or by value? are they impulsive or do they stick to a list?).

This chapter seeks to determine the mental cues and preferences that drive grocery venue selection as well as general shopper tendencies.

1.2 It's a Deli State of Mind

Once we have our shoppers in the supermarket, we can begin to explore shopper perspectives on the in-store deli and bakery departments specifically. This chapter investigates both the current landscape (frequency of department visits vs. purchases) and recent behavioral changes (increased or decreased visitation).

Additionally, we take an in-depth look at the attributes and features that matter most to customers as they evaluate their supermarket service deli and bakery departments. We account for both stated importance ratings (what consumers say is important) and derived importance ratings (what actually does matter to them as determined by regression analysis).

Finally, we examine shopper perceptions of service deli and bakery products as compared to pre-packaged alternatives from the regular aisles. This data serves to provide additional context to the importance ratings mentioned above.

Observed holistically, we start to define who the core buyers at these departments really are and how their decision-need states differ relative to each department, thereby allowing us to paint a detailed picture of our target shopper set.

1.3 Deli Decisions: Meat, Cheese, & Prepared Foods

Having established that the most crucial intersection for in-store deli sales is at the point of sale, where consumers meet the product, we can now build out actual Consumer Decision Trees (CDT) to model shopper behavior and provide insights into the purchase decision process.

In this chapter, we identify and analyze all of the different factors that alter the probability of whether or not consumers are likely to make a purchase. We examine purchase influences first within the in-store deli department as a whole, and then specifically within each of the deli meats, deli cheese, and hot & cold prepared foods sections.

By mapping out the most impactful decision points, we start to profile category buying behavior to uncover actionable strategies with maximum potential for sales growth.

1.4 Bakery Decisions: Breads, Desserts, & Breakfast Goods

Similar to how we approached the previous chapter, we now examine the purchase decision process within the in-store bakery department to determine where best for retailers to focus their strategic efforts.

In this chapter, we map out the most impactful factors in determining whether or not consumers will make a purchase at the in-store bakery. We also take a closer look by developing individual Consumer Decision Trees for each of the service breads, service desserts, and service breakfast baked goods sections.

1.5 Appearances Still Matter

In Datassential's 2011 Innovation Trends, Attitudes, and Opportunities report for IDDBA, we discussed at length the importance of visual appeal as it relates to technology and innovation. In this chapter, we revisit the topic in a new light. Having established that impulsive shoppers tend to make decisions at the point of sale, the visual appearance of grocery stores and their service deli & bakery areas become even more critical.

Not only does the overall appearance of these departments contribute to in-the-moment purchase decisions, but impressions left at the point of purchase also affect future behavior, the duration of which might be indefinite.

We undertake to explore "appearances" as they relate to both specific visual cues as well as the holistic "look" of a department. Both are powerful motivators which deeply affect shopper attitudes and conduct.

1.6 Variety is the Spice of Life . . . and the Deli

Partially due to the broadening of options for grocery venues in general, consumer expectations for the in-store deli and bakery departments have also evolved such that variety plays a more impactful role in the overall shopping experience.

First, it helps to bolster the overall appearance of the service deli and bakery departments and thereby also encourages both visitation and more serious consideration by passersby. And during our CDT analyses in earlier chapters, we also identified variety as an impactful factor in purchase decisions once consumers had already entered the area. Beyond either of these, variety lends to the overriding perception that the in-store deli and bakery departments are a true priority for retailers.

This chapter seeks to gain a deeper understanding of the specific aspects of the deli which are affected by variety (such as niche products, customization opportunities, and healthier offerings) as well as the ways in which variety impacts consumer preferences and decisions overall.

1.7 Freshening Up the Freshness Proposition

It is an understatement to say that a retailer's freshness proposition plays a dominant role in the consumer purchase decision process. In fact, the absence of freshness is often a primary reason for abandoned purchases. Moreover, freshness often serves as a gateway to other claims, such as quality. In fact, for many shoppers, freshness and quality are often indicators of each other, particularly as they pertain to the service deli and bakery areas.

So how do retailers communicate freshness and quality? In this chapter, we dig into how retailers can translate these seemingly intangible qualities into something perceptible on which consumers can base purchase decisions. Through this exploration, we identify a collection of freshness indicators ranging from expiration dates on cold cuts to the aroma of freshly-baked bread.

1.8 FYI: Informed Shoppers Expect Information

Consumers today have nearly unlimited access to every kind of information, so it follows naturally that their expectations for information from the service deli and bakery departments have evolved in kind. As such, it is important for these departments, which have traditionally lagged in this area, to step up to meet shopper demands.

"Information" here encompasses anything that will further enable customers to ultimately make an informed purchase decision. In this chapter, we outline the most influential types of information, ranging from the basics (what is it? why aren't these items labeled?) to more nuanced details (who made it? how long were the ingredients in transit before arriving here?).

As communications with customers are primarily one-way, retailers should approach the dissemination of information as an opportunity to dispel shopper doubts, improve overall perceptions, and promote the key tenets of their service deli and bakery philosophy.

1.9 Service Serves a Purpose

Customer service entails far more than just managing issues and complaints as they arise. This is particularly true of the service deli and bakery departments, where consumers are often dependent on staff for accessibility and information. As such, in-store deli and bakery employees represent a real opportunity for retailers to connect personally with customers in a way that other departments don't allow.

The potential for deli and bakery staff extends far beyond slicing meat and boxing pastries. Retailers who recognize the possibilities can leverage their staff to engender deeper customer loyalty and provide more effective customer communication overall.

In this chapter, we discuss the numerous ways in which the quality of a retailer's staff and the level of service they provide can dramatically increase or decrease the purchase probability at the in-store deli and bakery departments.

3 Research Overview *(excerpts from Chapter 2)*

The International Dairy-Deli-Bakery Association™ (IDDBA) commissioned Datassential to develop research on Shopping Dynamics: Consumer Decision Trees. This study incorporates consumer and industry research to address five key objectives:

1. Explore and define the core buyers and their decision-need states.
2. Determine the mental cues and preferences that drive supermarket shopping versus other food outlets.
3. Uncover the triggers for purchasing, switching, and abandonment in the shopping process.
4. Measure the importance and impact of purchase decision factors.
5. Develop a multi-branch Consumer Decision Tree for consumer shopping behavior in the deli and bakery departments.

2.1 Study Purpose

The broad purpose of this study is to develop a clear understanding of consumer decision-making for purchases in the service deli and bakery departments. We have generated distinct consumer decision trees within the deli and bakery departments to map out the key thoughts and decision criteria consumers face every day while they shop. By comparing and analyzing these purchase decisions, we can ultimately help to identify the critical influence points and purchase triggers that retailers can focus on for sales growth.

2.2 Methodology

1. Ethnographic interviews: 100 shop-alongs interviews, using professional field interviewers and eyeglass recording.
2. Shopper intercepts: 100 in-depth, one-on-one intercept interviews.
3. Consumer survey research: 2 online surveys. Each survey was conducted with a nationally-representative U.S. sample of just over 1,500 head-of-household consumers.
4. Industry data and other secondary sources.

To help consumers understand which areas of the store are being referenced and to help them differentiate between the grocery aisles and fresh perishable departments, the term "fresh" was used in place of "service." Consumers were asked about "fresh bakery," "fresh deli," and "fresh cheese," etc., areas of the store rather than the industry terms "service bakery," "service deli," "service cheese," etc. We will use "service" within the text to describe these departments and the grab-n-go or packaged areas staffed and associated with these departments. For accuracy, we have maintained the term "fresh" when quoting survey questions.

To give you a small sample of the data in the complete study we have "abstracted" key chapters. The full study includes much more detail, full tables, and strategies.

This report utilizes Consumer Decision Tree (CDT) diagrams to help you visualize the purchase decision process. The Consumer Decision Tree model uses in-store, point-of-sale data to model realistic shopper behavior "in the moment" and within the context of a particular store format and its corresponding merchandising conditions. Each "tree" models shopper behavior from the decision to visit the service bakery or deli to the point of purchase for distinct consumer groups with different needs and motivations. Visualizing survey data in this way is particularly helpful because the statistical analysis pulls out only those attributes that are predicted to affect shopper behavior beyond the baseline "general population." Each "node" of the decision tree represents a point at which a relevant group of consumer respondents are split off based on the likelihood of a specific department attribute affecting their purchasing behavior.

iDEA™ System. Included with this report is access to the Datassential iDEA™ (interactive Data Evaluation & Analytics) system for further cross-tabbing consumer survey responses. With iDEA™, you can run your own custom filters against the data, with all data tables, charts, and statistical confidence intervals updating in real-time. The iDEA™ system runs in MS Excel on Windows PCs, and is available through either IDDBA or Datassential.

Statistical reliability. The 1,500 sample level, for both surveys, corresponds with a maximum margin of error of +/- 2.5% at the 95% significance level; this means in 95% of cases, that any statistic reported for the full study sample of 1,500 respondents should deviate no more than 2.5% from those exhibited by the general consumer population. When cross-tabs are applied to the data, smaller sample sizes correspond with greater statistical error margins.

Note that the iDEA™ system reports confidence intervals at the 95% significance level for each question under the headings "hi" and "low." Hi and low values of 70% and 68% respectively, for example, would indicate that we could be 95% certain that in the real-world, the value would fall between 68% - 70%. Please also note that the iDEA™ system enables you to alter the significance level to 90%, 85%, or some other level of your choosing.

3 Decisions, Decisions . . . Where to Begin? *(excerpts from Chapter 3)*

In today's highly competitive environment, it is critical to understand how consumers think about their grocery shopping experiences, from the moment they choose to enter a store to the instant that they check out. . .and all the steps they take in between.

The aim of this report is to provide a clear picture of the consumer decision process in supermarket deli and bakery departments and its implications for retail strategies. Given the complexities of today's service deli & bakery departments, we use Consumer Decision Trees (CDT) to build a step-by-step guide to what's driving the consumer toward the supermarket, whether they will enter the deli or bakery departments, what variables influence their purchase decisions while in those departments, and if, how, and why consumers switch between products or simply walk away.

The Consumer Decision Tree model uses in-store, point-of-sale data to model realistic shopper behavior "in the moment" and within the context of a particular store format and its corresponding merchandising conditions. By showing how consumers logically shop a real-life category, we can provide insight into the purchase decision process and assign importance-values to individual product and department attributes. In this way, CDTs can help retailers to align their shelf set with customer needs and enhance in-store communication to optimize the customer experience.

Finally, by formulating Consumer Decision Trees to map out the key thoughts and decision criteria which consumers face every day while shopping, comparing, and analyzing their purchase decisions, we will identify the critical influence points and purchase triggers which can serve as focus areas for retailers in developing successful growth strategies.

3.1 Off to Market We Go

In order to understand how decisions within supermarket delis and bakeries are made, we must first begin by exploring the behaviors of shoppers in general and the circumstances under which they tend to shop. In other words, which factors trigger trips to the supermarket and what is the customer frame of mind while shopping? Are trips planned or impulsive? Once there, are actual purchases planned or impulsive? Are consumers generally receptive to shopping for items beyond what was planned? By understanding these factors, we can hope to get a gauge for how influential we can be once they have come through the door. The remainder of this chapter is meant to set the stage and provide insightful context about grocery shoppers in general.

3.1.1 Shopper Frequency

Multi-source usage is the norm for grocery shoppers. In other words, consumers rarely rely solely on traditional supermarkets for all of their grocery needs. While all study participants were required to visit traditional supermarkets at least once per month, the vast majority also rely on other different types of stores as well. For instance, 88% or almost 9 out of every 10 consumers who shop at traditional grocery stores at least once per month also shop for groceries at discount super centers (such as SuperTarget®, Walmart Supercenter, etc.) during that same time period. More than half also use at least one of the other listed types of grocery sources: specialty supermarkets, discount supermarkets, farmers' markets / local produce shops, club stores, and even convenience stores.

On average, each shopper purchases groceries from approximately 5 of the 7 formats during a given month.

Consumers are currently motivated to spread their grocery purchases across a variety of sources for a number of reasons, including (but certainly not limited to) cost management, convenience, and specific product needs and preferences.

As retailers roll out their latest marketing and customer communication platforms, it will be important for them to keep in mind that the competitive set extends far beyond just other traditional supermarkets. Additionally, competition from these other channels is getting increasingly stiff.

Case in point, approximately 4 in 10 current customers of traditional supermarkets say they are actually purchasing groceries from discount super centers (such as Super Target®, Walmart Supercenter, etc.) more often today as compared to a few years ago.

This is in large part a direct result of these major discounters' aggressive efforts in recent years to incorporate themselves as contenders within the short list of top-of-mind grocery destinations.

As competition for each incremental grocery dollar gets more and more intense, it will be increasingly important for retailers to differentiate themselves from one another in a meaningful way. Offering a superior service deli or bakery experience is one way to accomplish this.

Representative tables shown: see full report for all tables.

Table 3. Approximately how often do you purchase groceries from each of the following types of stores?

	Daily	Several times per week	Once per week	Once every couple weeks	Once per month	Less often / never
Traditional supermarket (such as a Kroger, Safeway, Albertson's, etc.)	7.0%	30.3%	43.8%	18.9%	0.0%	0.0%
Specialty supermarket (such as Whole Foods, Wild Oats, Trader Joe's, etc.)	4.1%	7.3%	11.9%	11.7%	16.1%	48.9%
Discount supermarket (such as Aldi, Cub Foods, etc.)	4.2%	7.9%	12.8%	13.6%	11.5%	50.0%
Discount super center (such as Super Target, Walmart Supercenter, etc.)	6.4%	18.7%	26.6%	21.1%	15.0%	12.2%
Farmers' markets / local produce shop	4.1%	6.0%	14.3%	14.5%	18.9%	42.2%
Club store (such as Costco, Sam's Club, etc.)	3.0%	5.6%	11.8%	15.9%	23.2%	40.5%
Convenience stores (such as 7-Eleven, Wawa, Circle K, etc.)	7.7%	13.5%	12.0%	11.3%	11.9%	43.5%

3.1.2 The 'Where'

Not only are consumers' grocery dollars spread across channels, but they are also shared between the many individual chains within each channel. Though Walmart is responsible for the largest share, it is still only considered the "primary" source for groceries by 23% of all shoppers. In other words, there is plenty of "pie" left to share among other retailers. With such a fragmented landscape, the importance of being able to differentiate oneself from the competition cannot be overstated.

- The majority of shoppers still designate one retailer as their "primary" source for groceries.
- The report looks at how people go about deciding where they do their grocery shopping.
- Consumers place the highest emphasis on low prices, perceived value, and convenient proximity to home.
- One in 4 customers said that "offers the most variety overall" is one of their top 3 most important factors when deciding where to shop for groceries.
- Deli- and bakery-specific factors ("offers the deli meats & cheese you most prefer," etc.) drive traffic for nearly one-third of all shoppers.

- The service deli and bakery departments can be key drivers of customer conversions.

3.1.3 The 'Who'

- It's important to consider the various shopper types when mapping out plans for store-to-shopper communications.
- The study examines shifts in behavior. We asked consumers to tell us which activities they have been doing more or less often over the past few years.
- The bulk of today's consumers are maintaining efforts to save money while concurrently endeavoring to eat a little healthier.

3.1.4 The 'When'

- The circumstances surrounding when consumers shop for groceries impact the total experience and contribute to the overall shopper mindset.
- Approximately 1 in 4 consumers agree that they are influenced by reminders from their grocer. This figure jumps to 1 in 3 among consumers who visit the deli at least once per week.
- It is imperative to be cognizant of traffic patterns to determine the days and times when consumers are most prone to shop.

Table 10. When shopping for groceries, would you say you are doing any of the following MORE today than you were a few years ago?

	ALL	SHOPPER TYPES							
		CONVENIENCE & PACKAGING	HEALTH & WELLNESS	IMPULSE	GROCERY LIST	BRAND	VALUE DRIVEN	EXPERIMENTAL	TASTE
Buying items on sale	64.9%	68.0%	65.1%	67.1%	67.1%	64.7%	71.1%	62.6%	61.5%
Cooking at home instead of going out to eat	59.3%	55.4%	60.6%	56.2%	60.7%	60.0%	62.9%	61.7%	58.5%
Paying attention to nutrition & ingredient labels	52.9%	47.7%	73.4%	46.7%	52.1%	51.8%	52.5%	57.0%	48.2%
Buying items including or made from whole grains (like rice, barley, etc.)	52.0%	45.3%	65.0%	47.4%	51.7%	49.2%	55.1%	54.3%	49.6%
Buying healthy / better-for-you items	51.6%	47.7%	71.9%	47.1%	50.0%	51.6%	50.8%	53.6%	47.8%
Buying clearance items	48.4%	50.9%	47.1%	53.8%	48.2%	45.6%	54.2%	48.5%	44.4%
Buying items with nutritional benefits (high in Omega-3s / antioxidants / fiber, etc.)	47.9%	45.8%	63.7%	40.8%	45.0%	49.4%	48.3%	50.3%	46.5%
Buying value brand / off-brand items	45.6%	45.5%	44.7%	43.3%	47.2%	39.8%	51.2%	44.7%	43.4%
Buying low sodium items	41.8%	43.8%	53.6%	35.1%	39.8%	45.6%	41.8%	40.7%	40.5%
Buying private label / store brand items	41.5%	44.1%	41.8%	39.5%	43.3%	36.5%	45.3%	42.1%	38.7%
Using self- checkout stations / kiosks	39.6%	39.8%	40.8%	41.2%	37.2%	43.7%	40.0%	43.3%	38.9%
Buying items in bulk quantities	37.6%	40.5%	40.5%	43.8%	36.0%	39.6%	37.4%	41.7%	35.1%
Buying locally-sourced items	33.5%	27.9%	43.8%	30.3%	32.9%	32.3%	31.7%	40.3%	32.5%
Buying diet foods (low calorie / fat / carbs / sugar, etc.)	33.3%	36.3%	41.9%	30.3%	31.4%	33.3%	33.3%	31.3%	31.9%
Buying sustainable items (or items in sustainable packaging)	30.4%	34.3%	35.2%	31.1%	27.2%	30.8%	30.2%	33.7%	29.6%
Buying ready-to-eat fresh prepared foods	29.0%	38.8%	27.0%	39.5%	24.6%	31.2%	28.4%	33.7%	30.8%
Buying organic items	29.0%	30.2%	43.7%	33.3%	26.0%	28.3%	24.5%	41.7%	25.7%
Buying eco-friendly items (or items in eco-friendly packaging)	27.0%	33.3%	38.6%	29.5%	23.4%	27.3%	23.7%	35.3%	25.3%
Buying items in individual-sized portions	24.8%	32.8%	23.5%	30.3%	21.1%	28.0%	22.8%	26.3%	25.6%
Buying gluten-free items	17.1%	21.9%	24.2%	15.4%	13.7%	18.5%	13.4%	19.3%	16.0%
Buying gourmet / premium items	15.0%	23.4%	19.9%	23.3%	9.6%	18.5%	9.7%	23.8%	15.7%
Eating meals in the grocery store (in the seating area)	9.3%	15.4%	8.6%	11.0%	7.0%	11.6%	6.4%	11.0%	8.9%

- Retailers must be flexible enough to make adjustments in order to put their best foot forward when busy consumers are most likely to appear.

3.1.5 The 'How'

- The majority of consumers shop from grocery lists, but they are not married to them.
- The store's interior is the last place where retailers get to actively engage with the shopper.
- The impression that is made at the point of sale is in effect the "last word," despite whatever shoppers have in mind prior to initiating their visits.
- The top three reasons for departures from the shopping list center on the idea that something unexpected caught their attention – newness, attractive appearance, smart placement.

Table 11. Please rate your agreement with each of the following statements about how you decide WHEN to go shopping for groceries.
Percentage of consumers who chose this as one of their Top 3.

If an item I like goes on sale, I usually stock up and buy several of them	63.0%
If I try a new item on sale and I like it, I am willing to buy that item again later even at full price	51.5%
I try to wait for items that I know I like (have purchased before) to go on sale before I will buy them	42.5%
If there's a new item / flavor I want to try, I usually wait for it to go on sale before I will buy it	36.4%
I only go grocery shopping when I run out of or am low on something I need / use regularly	36.0%
I always do my grocery shopping at a certain time / day of the week	35.9%
I only try new items / flavors if they are on sale	31.7%
I usually wait to go grocery shopping until I have coupons to use	27.2%
I am most likely to go grocery shopping right after I receive a mailer or email alert on specials	25.2%
When I'm hungry, it reminds me that it's time to stock up on groceries	21.2%
I only go grocery shopping when someone in my household requests something that's not in the house	18.9%
At meal time, I often purchase ready-to-eat meals from the grocery store to eat right away	16.7%
When I'm bored – I often just go to the grocery store to browse around and see what's new or on sale	15.9%
Seeing CLEARANCE / CLOSEOUT items makes me think there's something wrong with those items	15.9%
I mostly go grocery shopping when I happen to be driving / walking past a store	14.7%
I go grocery shopping every day	14.4%
Seeing SALE items makes me think there's something wrong with those items	11.0%

4 It's a Deli State of Mind *(excerpts from Chapter 4)*

To understanding the various factors involved in bringing consumers across the threshold and through the supermarket doors, it is important to explore shopper perspectives and mind-states as they actually approach the service deli and bakery departments.

4.1 The Current Situation

Approximately 6 in 10 consumers visited either the deli & prepared foods department or the service bakery department the last time they went grocery shopping. By comparison, 9 in 10 shoppers visited the produce and dairy departments. The disparity between those who actually made a purchase from each of these departments is even wider.

4.1.1 Just Passing Through

While it's safe to say that the majority of deli and bakery patrons would prefer to buy items from these departments at a discount, only a relatively small percentage will absolutely refuse to make a purchase unless promotional pricing is involved. The remainder of the pool of potential customers is at least open to buying if they see something they find appealing.

Note that for either of the fresh departments, curiosity was a main visitation driver, which serves to reinforce the idea that many shopper occasions are spontaneous and motivated by impulse. Fewer expressed having approached with a specific need in mind. The aim, therefore, should be to supply curious shoppers with a need they didn't originally foresee.

Table 19. When did consumer decide to visit fresh departments?

When did you decide to visit the FRESH DELI & PREPARED FOODS section?	
Before you arrived at the grocery store	49.7%
After you arrived at the grocery store	50.3%
When did you decide to visit the FRESH BAKERY section?	
Before you arrived at the grocery store	42.1%
After you arrived at the grocery store	57.9%

4.1.2 Converting Browsers To Buyers

When thinking about ways in which retailers might effectively communicate how the service deli or bakery departments can fulfill their shoppers' needs (whether they are conscious of those needs or not), it is useful to first examine where shoppers tend to assign importance within each department.

One thing to note when considering importance ratings is that often what consumers say is most important doesn't always bear out in how they actually behave. So, in order to identify any discrepancies, we use regression analysis to determine derived attribute importance scores, which are then plotted against the stated scores to classify deli and bakery attributes.

Table 20. Why consumers shop fresh sections.

Which of the following best describe WHY you decided to visit the FRESH DELI & PREPARED FOODS section of the grocery store? Select all that apply.	
I was walking past the deli section and I WAS JUST CURIOUS	29.7%
I was out of deli items at home	26.8%
I was walking past the deli section and SOMETHING CAUGHT MY EYE	24.2%
I always visit the fresh deli & prepared foods section when I go grocery shopping	21.9%
I was hungry - I wanted to purchase a prepared meal TO TAKE HOME	21.0%
Someone in my household requested something from the deli section	20.6%
I was hungry - I wanted to purchase a prepared meal to eat AT THE STORE	12.0%
I needed to pick up items for a special event / occasion AT MY HOUSE	10.5%
I had deli coupons to use	10.5%
I needed to pick up items for a special event / occasion AT SOMEONE ELSE'S HOUSE	8.9%
I received a mailer or email alert on deli specials	8.4%
Which of the following best describe WHY you decided to visit the FRESH BAKERY section of the grocery store? Select all that apply.	
I was walking past the fresh bakery section and I WAS JUST CURIOUS	36.9%
I always visit the fresh bakery section when I go grocery shopping	33.0%
I was walking past the fresh bakery section and SOMETHING CAUGHT MY EYE	32.9%
I was walking past the fresh bakery section and THE AROMA CAUGHT MY ATTENTION	25.6%
I ran out of bakery items that I regularly purchase at home	24.2%
I was hungry - I wanted to purchase a bakery item TO TAKE HOME	23.6%
Someone in my household requested something from the bakery section	23.2%
I needed to pick up items for a special event / occasion AT MY HOUSE	16.9%
I was hungry - I wanted to purchase a bakery item to eat AT THE STORE	12.2%
I needed to pick up items for a special event / occasion AT SOMEONE ELSE'S HOUSE	11.7%
I had bakery coupons to use	8.5%
I received a mailer or email alert on bakery specials	6.3%

In the full version of the report we focus on differentiating between:

Key Drivers –the critical attributes that consumers both state as being important, and that drive their underlying decision to purchase specific products. These factors are most important.

Unspoken Motivators –although these attributes don't necessarily stand out in consumers' minds, execution here can have a great impact on satisfaction.

Minimum Requirements –areas that must be delivered on; excellent performance may not necessarily gain business, but poor performance here can result in lost business.

Low Yield – mostly unimportant attributes.

4.1.3 Loyalty

This chapter identifies the features and attributes that are most important to potential service deli and bakery customers. Is delivering on these enough to persuade an existing customer to designate a new retailer as their "primary" source for groceries? In other words, how loyal are customers and to what extent might this affect product trial, switching, and adoption behavior? We seek to better understand the depth of customer loyalty as it relates to supermarket delis and bakeries so we can start to uncover how.

Shoppers are roughly evenly split between those who do and those who don't have a favorite. Furthermore, as evidenced by the number of times during their last 10 visits that they actually went to their preferred destination, even consumers who claim to have loyalty ties aren't necessarily swayed enough to prompt a visit.

4.2 If You Improve It, They Will Come

It's important to remember that grocery shoppers are busy people whose lives are constantly being adjusted to fit their changing needs and objectives. Some people who might have been shopping for just themselves a year ago may be shopping for whole families now (and vice versa), while others may be crunched for time today where they might have had more time to cook at home previously. Grocers who can offer a satisfying service deli or bakery experience to shoppers regardless of where they happen to be in the various stages of their lives are poised for success.

Consumers who classify themselves as Impulse or Convenience driven have a higher probability of shopping the deli and bakery departments more often today (compared to the general population at large). This makes sense as we've established that many deli and bakery visits are unplanned, so it stands to reason that impulsive shoppers would be more apt to wander through. Similarly, the ready-to-eat nature of many deli and bakery items makes them ideal candidates for convenience-focused patrons.

Perhaps even more interestingly, people who currently shop at the deli or bakery at least once per week are much more likely than the overall population to claim that they have been visiting these departments more often within the past year, which indicates a recent behavioral change. In other words, many of today's frequent deli and bakery shoppers only became this way of late.

4.2.1 Increased Visitation – Deli

This section examines reasons why some shoppers have been purchasing MORE from the service deli & prepared food sections of the grocery store over the past year.

4.2.2 Increased Visitation – Bakery

This section examines reasons why some shoppers have been purchasing MORE from the service bakery section of the grocery store over the past year.

4.2.3 Decreased Visitation – Deli

This section examines reasons why some shoppers have been purchasing LESS from the service deli & prepared food sections of the grocery store over the past year.

4.2.4 Decreased Visitation – Bakery

Reasons why some shoppers have been purchasing LESS from the service bakery section of the grocery store over the past year.

4.3 The Lure of the Aisles

Most research includes extensive discussions about the importance of differentiation, but always as it relates to standing apart from competing supermarkets. The reality is that not only do in-store deli and bakery offerings need to outshine in-store deli and bakery offerings at other stores, but they also need to compete effectively against other options available elsewhere within the same store.

4.3.1 Deli Meats & Cheese

This section starts with an example of the perception that service deli items are "better-for-you" than comparable pre-packaged alternatives. This is certainly a positive sign for service deli purveyors. As we mentioned earlier in this report, it's worth some further exploration to see what proportion of consumers actually subscribe to this idea. Moreover, we wanted to test where consumers tend to fall on the spectrum between service deli vs. pre-packaged deli across a variety of metrics.

4.3.1.1 Price

As pricing in the service deli area is usually listed by weight, perhaps apples-to-apples price comparisons between deli and aisle products (where the comparable packaged items are all listed in per package values) at the deli counter would help to dispel this perception. Alternatively, in cases where freshly-sliced items are pricier, retailers might highlight the benefits such as quality and freshness – which the research shows many customers believe to be true – to justify the slight premium.

4.3.1.2 Shelf-Life

The consumer perception that pre-packaged products have a better shelf-life has several implications – in fact, pricing as an issue seems straightforward by comparison.

This observation about shelf-life leaves the initial impression that a shorter shelf life is both a purchase barrier and general obstacle for the service deli, but all hope is not lost. If in fact, deli products must be consumed within a shorter timeframe, in-store delis might help to facilitate this by providing usage suggestions and application ideas to ensure that customers aren't left wondering what to do with their purchases. A side effect of the "Freshness preception" could be that its fresh ingredients means no preservatives.

Table 25. Purchase frequency of fresh deli and prepared foods.

Over the past year, would you say that you are purchasing from the FRESH DELI & PREPARED FOODS areas more or less often today?

	ALL	WEEKLY CUSTOMERS			
		Meat	Cheese	Hot Prep	Cold Prep
Much more often	10.5%	19.2%	20.3%	22.6%	21.9%
Somewhat more often	22.1%	33.5%	33.0%	34.0%	34.0%
No change	44.4%	37.4%	35.4%	31.6%	33.3%
Somewhat less often	14.3%	7.5%	8.6%	9.0%	7.9%
Much less often	8.6%	2.5%	2.9%	2.9%	2.8%

Over the past year, would you say that you are purchasing from the FRESH BAKERY area more or less often today?

	ALL	WEEKLY CUSTOMERS		
		Breads	Desserts	Breakfast Goods
Much more often	11.0%	17.4%	21.5%	21.3%
Somewhat more often	25.4%	33.6%	36.1%	33.8%
No change	46.6%	38.7%	34.7%	35.7%
Somewhat less often	11.3%	8.6%	6.2%	7.4%
Much less often	5.7%	1.6%	1.4%	1.8%

Table 26. Purchase attitudes of fresh deli and prepared foods during last year.

Over the past year, would you say that you are purchasing from the FRESH DELI & PREPARED FOODS areas more or less often today?

	ALL	SHOPPER TYPES							
		CONVENIENCE & PACKAGING	HEALTH & WELLNESS	IMPULSE	GROCERY LIST	BRAND	VALUE DRIVEN	EXPERIMENTAL	TASTE
Much more often	10.5%	18.5%	11.1%	18.6%	7.2%	10.8%	8.4%	13.2%	11.8%
Somewhat more often	22.1%	29.7%	25.0%	24.3%	20.6%	23.5%	17.9%	27.2%	22.4%
No change	44.4%	34.7%	42.2%	40.5%	46.5%	46.5%	45.7%	40.4%	45.0%
Somewhat less often	14.3%	12.2%	12.6%	10.5%	16.2%	12.5%	17.6%	11.5%	14.0%
Much less often	8.6%	5.0%	9.2%	6.2%	9.6%	6.7%	10.4%	7.7%	6.9%

Over the past year, would you say that you are purchasing from the FRESH BAKERY area more or less often today?

	ALL	SHOPPER TYPES							
		CONVENIENCE & PACKAGING	HEALTH & WELLNESS	IMPULSE	GROCERY LIST	BRAND	VALUE DRIVEN	EXPERIMENTAL	TASTE
Much more often	11.0%	15.9%	12.1%	12.7%	7.7%	12.5%	7.3%	15.0%	11.7%
Somewhat more often	25.4%	33.3%	24.8%	28.9%	22.8%	31.4%	22.9%	28.3%	25.7%
No change	46.6%	39.8%	45.1%	41.2%	49.8%	44.8%	48.4%	40.0%	47.9%
Somewhat less often	11.3%	5.5%	10.8%	11.8%	13.7%	8.6%	13.8%	13.3%	9.9%
Much less often	5.7%	5.5%	7.3%	5.3%	6.1%	2.7%	7.7%	3.3%	4.9%

4.3.1.3 Convenience Or Inconvenience

Sentiments echoed by many consumers, indicate that deli counter inconvenience is a widespread, though easily resolved, issue. Hiring enough staff to keep the lines minimal, especially during peak hours, is essential. Some reduction in margin resulting from having to pay for more workers is unavoidable, but this is more than offset by the prevention of lost business due to would-be customers taking one glance at the massive line and either not buying or shopping elsewhere.

4.3.2 Bakery Items

There are some similarities of note between in-store deli and bakery products with regard to consumer preferences for either fresh or pre-packaged versions. For instance, the percentages for quality, freshness, and nutritional content are similar between the two categories. However, it's the dissimilarities that seem even more interesting. The most notable departure from service deli perceptions is that for bakery items, consumers seem to place fresh and pre-packaged options on approximately equal footing for both price and convenience (recall that these are two areas where shoppers tend to prefer pre-packed deli products from the regular aisles).

4.3.3 The Pricing Proposition

This section explores the pricing system (by weight) used at most in-store service deli departments. Given the disparity between customer perceptions about prices between the two fresh departments as they compare to products found in the regular aisles, we think it's worth a closer inspection to find out how consumers think about "pricing by weight" overall.

Deli items are generally priced by weight while bakery items are not. By the same token, service deli items are generally perceived by consumers to be more expensive than similar pre-packaged items while the same is not true of bakery items. So is this a causal relationship?

4.4 Sensible Shopping

Today's grocery shoppers use all of their senses to make their purchasing decisions – from the sight of a brightly lit display and the smell of freshly baked bread to the feel of a warm batch of new cookies and the sound of staff with friendly recommendations and suggestions, not to mention the taste of a complimentary sample.

Some grocers have taken steps to manufacture a "captive audience" in the service deli and bakery departments by making a trip through them inescapable with front-and-center store placement, but what makes the deli more than just a means to get from produce to the snack aisle? It needs to appeal to all of the senses.

It's important to keep all of the available senses in mind while developing communication strategies for either of the fresh departments. It's also important to consider how all of the various sensory inputs work together. A well-developed platform which highlights both quality and freshness while enhancing the overall shopping experience can be hugely impactful in triggering purchase occasions.

Table 29. Which of the following types of information would you like to see for the fresh prepared foods available? Select all that apply.	
Date / time of initial preparation (or indication of how long it's been out)	47.4%
"Use by" date or handling instructions (ie. consume within 7 days, etc.)	44.3%
Nutritional content (calories, fat, protein, sodium, etc.)	41.4%
Ingredients list	40.7%
Price per pound	32.4%
Heating or preparation instructions (ie. bake at 350F for 10 minutes, etc.)	32.3%
Price per "meal"	32.0%
Price per serving	30.4%
Recipe or serving suggestions	22.4%
Descriptive text ("tastes like homemade", "locally-grown herbs", etc.)	19.6%
Brands	17.2%

Table 30. Please tell us how you generally decide whether or not to visit each of the following departments when shopping for groceries?
Select one per row.

	Visit every time	Visit occasionally	Visit only when I need something specific
Produce (fruits & vegetables, etc.)	64.6%	22.2%	13.2%
Dairy (milk, yogurts, creamers, packaged cheeses, etc.)	59.0%	23.7%	17.3%
Meats (butchered products like chicken, beef, pork, etc.)	51.8%	27.6%	20.6%
Frozen foods / freezer section (frozen dinners, ice cream, etc.)	46.7%	33.2%	20.1%
Beverages (non-alcoholic)	44.7%	29.5%	25.8%
Snack foods aisle (chips, pretzels, branded cookies, etc.)	42.5%	35.9%	21.6%
Canned goods aisle (soups, vegetables, etc.)	41.0%	32.7%	26.3%
Breakfast foods aisle (dry cereals, hot cereals, jams & jellies, etc.)	40.7%	34.3%	25.0%
Fresh bakery (where staff helps you with freshly-baked cakes, breads, etc.)	32.1%	38.3%	29.6%
Bulk dry goods aisle (rice, flour, dried beans & legumes, etc.)	29.4%	34.8%	35.8%
Deli & prepared foods (meats & cheeses sliced to order, ready to eat hot & cold foods, etc.)	29.1%	35.2%	35.7%
Ethnic foods aisle (international foods, imported foods, etc.)	21.2%	34.5%	44.4%
Seafood (fresh & frozen seafood products like fish, shellfish, etc.)	20.9%	32.8%	46.3%

4.5 Non-Shopper Perspectives

In compiling a comprehensive look at the service deli and bakery departments, we can't afford to ignore the people who say they don't shop there, especially given that at least some of them probably did in the past. Though not everyone would make that same tradeoff, cleanliness is clearly a distinguishing factor for many. So much so that fully 13% of consumers independently identified it as something that makes one grocery store's service deli & prepared foods department better than any other one. Furthermore, cleanliness rated as one of the most important attributes for consumers when considering in-store deli & prepared foods areas.

4.5.1 Not To Be Taken Lightly

Lighting plays an important role in creating ambiance and maximizing merchandise appeal. Most retailers have come to realize that it warrants treatment as more than an afterthought. As a result, many stores have undergone updates, from the old fluorescent bulbs that give everything a faintly dismal tinge to warmer tracked lighting, similar to that found in many coffee shops and cafés.

7 Appearances Still Matter *(excerpts from Chapter 7)*

In Datassential's 2011 report for IDDBA, *Innovation Trends, Attitudes, and Opportunities*, we talked a lot about how appearances are truly at the crux of shopper perceptions. We explored (in the context of technology and innovation at the time) how deeply the appearance of grocery stores and their service deli & bakery areas affect consumer attitudes. As it pertains to *decision making* at the deli or bakery, the same is still true.

7.1.3 Where Order Prevails

No doubt, an organized presentation of offerings is an important part of the overall appearance at in-store service deli and bakery departments. But there's much more to it. Organization, like cleanliness, entails several components, all of which play an important role in relaying a store's overall message to shoppers.

7.2 "Eye-Catching" Is The Catch

This report established two important behavioral traits regarding consumers who find themselves in the service deli and bakery areas. First, they are often just passing through on their way to another section of the store and. Second, their decision to visit the deli is often made after they get to the store. Both of these serve to emphasize the high importance of visual appeal.

As we've just discussed the value of addressing both fundamentals (like cleanliness) and ambiance (with lighting, design, organization, etc.) in the in-store bakery and deli department, we can begin to tackle some of the less subtle aspects of visual appeal.

Table 31. Primary reasons consumers don't shop fresh deli and prepared foods sections.	
Which of the following would you consider the primary reasons why you do NOT visit the FRESH DELI & PREPARED FOODS area of your grocery store more often? Select all that apply.	
The prices are too high in general	56.6%
Similar items from the regular aisles are usually cheaper / on sale	28.6%
It is more convenient / easier to shop from the regular aisles	23.1%
The items displayed do not look fresh	11.5%
It takes too long to shop in this section	11.5%
Items you've tried in the past did not taste good	9.3%
Items in this section usually don't list nutritional information	9.3%
There are not enough healthy / better-for-you options	8.8%
The items displayed do not look appealing	8.8%
The counter is often closed when I shop	7.7%
The lines at the counter are too long	6.0%
Items in this section usually don't provide an ingredient list	6.0%
Items in this section usually don't have expiration dates	6.0%
That area of the store did not look clean / sanitary	5.5%
Items in this section usually have a shorter	5.5%
The people at the counter are not friendly	4.9%
That area of the store did not look modern / updated / upscale	3.8%
The people at the counter are not knowledgeable	2.2%
Items in this section usually don't provide recipe / serving suggestions	1.6%
Please rate your agreement with each of the following statements about the FRESH DELI & PREPARED FOODS DEPARTMENT. Percentage of consumers who chose this as one of their Top 3.	
I will pick which grocery store I visit because of this department	21.8%
I often judge a grocery store by how much I like or dislike its fresh deli & prepared foods offerings	22.3%

Table 32. Primary reasons consumers don't shop fresh bakery	
Which of the following would you consider the primary reasons why you do NOT visit the FRESH BAKERY area of your grocery store more often? Select all that apply.	
The prices are too high in general	43.9%
There are not enough healthy / better-for-you options	21.1%
Similar items from the regular aisles are usually cheaper / on sale	18.7%
I usually like to make my own baked goods from scratch	17.9%
It is more convenient / easier to shop from the regular aisles	13.8%
Items in this section usually have a shorter shelf life	11.4%
The items displayed do not look fresh	8.1%
Items you've tried in the past did not taste good	7.3%
The staff at the counters are not friendly	5.7%
Items in this section usually don't list nutritional information	5.7%
Items in this section usually don't provide recipe / serving suggestions	5.7%
The counter is often closed when I shop / there is no one there to help me	4.9%
The items displayed do not look appealing	4.9%
The lines at the counters are too long	4.1%
That area of the store did not look modern / updated / upscale	3.3%
It takes too long to shop in this section	3.3%
Items in this section usually don't have expiration dates	3.3%
Items in this section usually don't provide an ingredient list	3.3%
The staff at the counters are not knowledgeable	0.8%
That area of the store did not look clean / sanitary	0.8%
Please rate your agreement with each of the following statements about the FRESH BAKERY DEPARTMENT. Percentage of consumers who chose this as one of their Top 3.	
I will pick which grocery store I visit because of this department	21.3%
I often judge a grocery store by how much I like or dislike its fresh bakery offerings	19.4%

Table 33. On a scale from 1 to 10, please rate how important OVERALL CLEANLINESS is when evaluating the FRESH DELI department of a grocery store. Percentage of consumers who chose this as one of their Top 3.		
	ALL	**80.2%**
Visit: At least weekly	Cheese	78.3%
	Meat	77.0%
	Hot Prep	75.2%
	Cold Prep	74.9%
SHOPPER TYPES	Experimental	85.1%
	Health & Wellness	83.5%
	Value Driven	82.6%
	Grocery List	81.5%
	Taste	81.0%
	Convenience & Packaging	80.2%
	Brand	80.1%
	Impulse	78.6%

7.2.1 Get Noticed

A majority of consumers are not examining deli or bakery displays extremely closely when they approach the area, so impressive or memorable first impressions are key. Again, first impressions are where the most critical decision is made, whether to stay or continue on, or more to the point, whether to shop or not. Thus, the visual presentation of these departments must be compelling enough to convince passersby that stopping to take a closer look would be to their advantage.

7.2.2 Out Of Sight, Out Of Mind

A majority of customers are open to purchasing items that aren't necessarily on the day's grocery list. This is another reason why visual appeal is so imperative. Eye-catching displays or striking signage can operate as a reminder to casual or impulsive shoppers. It's almost as if these consumers are looking for a reason to buy something. There's no harm in reminding them of why shopping in the deli or bakery is a great idea.

7.2.3 Traffic Stopping Signage

Signage serves as a fundamental method by which retailers can communicate directly with customers. Additionally, signage surfaces multiple times throughout our decision tree analyses as a trigger point in purchase decisions. It can be hugely impactful, but is often either overlooked or underestimated.

7.2.4 Sales & Promotions

Pricing is a major issue for consumers in today's economy, so sales and promotions came up a lot in terms of what shoppers are most excited to see at in-store deli and bakery departments. However, promotions are more than just a discount on individual items. Sale tags and promotional signs are also visual markers that supermarket patrons are accustomed to scanning for as they pass through one department on their way toward another, and they are a major reason why people pause to take a closer look.

7.2.5 If You Pay Attention, So Will They

One reason the maintenance of a clean and orderly appearance is so crucial is that it conveys to shoppers that the retailer is conscientious. Beyond just the overall appearance, if customers are able to physically see deli or bakery department personnel in the act of upkeep and obviously invested in the appearance of the merchandise, it further hammers home the message that the service deli and bakery departments are a real priority for the retailer.

Table 35. During your last visit to the grocery store, which of the following caught your eye when you first approached the ____ section?
Select all that apply.

DELI MEATS		FRESH BREADS	
Sales / price specials	50.0%	The wide selection of breads available	53.1%
The wide array of meats displayed	48.9%	The display of featured bread items	45.0%
Signs above or around the glass case	24.8%	Sales / price specials	36.8%
Brand logos or signs showing the brands of meat available	24.4%	Free samples	20.5%
Free samples	22.9%	Signs above or around the bread items	19.2%
Pictures or photos of deli meats	10.7%	The baking equipment (ovens, etc.)	12.1%
Products labeled "new item"	9.2%	Pictures or photos of bread items	9.2%
		Products labeled "new item"	7.5%
DELI CHEESES		**FRESH DESSERTS**	
The wide array of cheeses displayed	55.8%	The wide selection of desserts available	50.4%
Sales / price specials	47.0%	The display of featured dessert items	49.2%
The enclosed glass case of cheeses with staff behind the counter	31.0%	The glass display case with dessert items	45.0%
Free samples	21.9%	Sales / price specials	32.6%
The open refrigerated self-serve case where bulk / unsliced cheeses are kept	21.3%	Free samples	22.5%
Brand logos or signs showing the brands of cheeses available	20.7%	Signs above or around the dessert items	18.9%
Signs above or around the display case(s)	19.4%	Unique / interesting items you had never seen before	17.2%
Products labeled "new item"	12.5%	The baking equipment in the back (ovens, etc.)	13.4%
Pictures or photos of deli cheeses	11.9%	Pictures or photos of dessert items	12.2%
		Products labeled "new item"	11.8%
FRESH PREPARED FOODS		**FRESH BREAKFAST BAKED GOODS**	
The wide array of prepared items displayed	40.2%	The display of featured breakfast baked goods	44.6%
Price specials / meal deals	39.2%	Sales / price specials	41.1%
A specific type of item (the pizzas, the sushi station, etc.)	26.4%	The wide selection of breakfast items available	40.6%
The menu board	24.9%	Free samples	29.3%
Signs above or around the display case(s)	22.6%	Signs above or around the breakfast baked goods	20.8%
Free samples	21.1%	Unique / interesting items you had never seen before	18.7%
The staff	19.3%	Products labeled "new item"	13.7%
Pictures or photos of prepared foods offered	15.4%	The baking equipment in the back (ovens, etc.)	13.7%
Self-service stations (soup bar, salad bar, etc.)	14.3%	Pictures or photos of breakfast baked goods	12.4%
Products labeled "new item"	12.3%		

Bonus Resources
for purchasers of Consumer Shopping Dynamics: The Decision Tree

The iDEA tool

Included with the full report is access to the Datassential iDEA™ (interactive Data Evaluation & Analytics) system for further cross-tabbing consumer survey responses. With iDEA™, you can run your own custom filters against the data, with all data tables, charts, and statistical confidence intervals updating in real-time. The iDEA™ system runs in MS Excel on Windows PCs.

Free 3 month subscription to Datassential's MenuTrends INSIDER

Updated each month, this online tool tracks new menu activity at the nation's top chain restaurants, with full searchability and automated email alerts. Offer expires July 2013.

YES! I'd like to order IDDBA's New Original Research
Consumer Shopping Dynamics: The Decision Tree

IDDBA Member _____ (# reports) x $395 $_______________
Non-member _____ (# reports) x $795 $_______________
Shipping/Handling: $10.00 $_______________
SUBTOTAL $_______________
Sales Tax: WI companies ONLY: Add 5% state sales tax $_______________
and if applicable .5% county tax $_______________
TOTAL AMOUNT DUE $_______________

METHOD OF PAYMENT

☐ **CHECK** enclosed for $_______________
(check payable to IDDBA in U.S. funds)

☐ **CREDIT CARD**
☐ Visa ☐ AmEx ☐ Master Card

\# _______________

Expiration Date _______________

Cardholder's name _______________

Cardholder's signature _______________

SEND REPORT(S) TO

Name: _______________
Title: _______________
Company: _______________
Street Address (No PO Box): _______________
City: _______________ State: _______________ Zip: _______________
Phone: _______________
Fax: _______________
E-mail: _______________
Name of person ordering (if different than above): _______________

Copy this form and mail to: International Dairy·Deli·Bakery Association™, PO Box 5528, Madison, WI 53705-0528
Orders also accepted by phone (608-310-5000), fax (608-238-6330), or on-line at www.iddba.org.