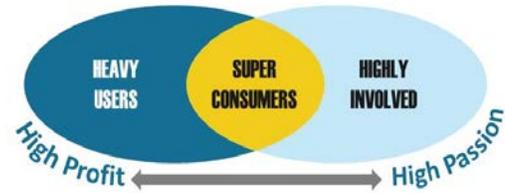


## Growing the Pie with Deli Meat

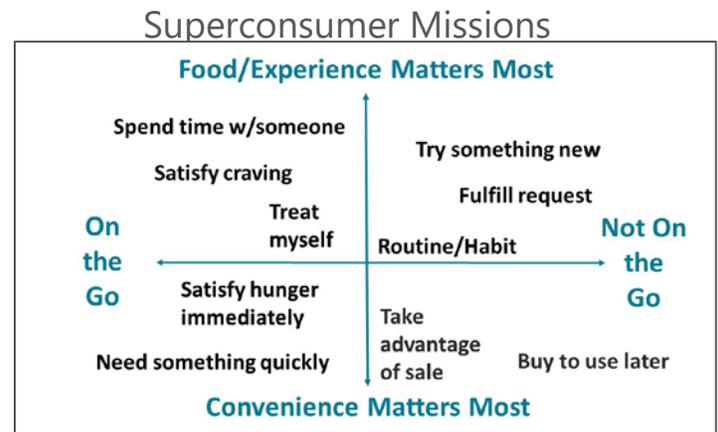
### Project Overview

In Stage 1 of IDDBA's superconsumer research project, we learned how deli superconsumers used food to improve their lives and how converting potential supers to spend more like a super could impact the industry. In this new phase of research, we've focused on how grocery can re-capture a fair share of the household food spend, as these days more is spent on food at restaurants than grocery. To do this, we dug deeper in to our categories; in this case by interviewing sliced deli meat sandwich supers, who made purchases at food service and grocery, to understand their motivations. Using these insights, we devised ways to increase in-store spend and trips and tested these concepts via a Nielsen Homescan survey and focus groups to provide *new* consumer-focused strategies.



### What did we learn from superconsumer purchase behavior?

Superconsumers have many types of deli meat sandwich 'missions', or objectives, which fall in to four categories: Convenience Matters Most, Food/Experience Matters Most, On the Go, and Not on the Go. Most deli meat missions occur at lunch and are for home consumption. Supers are open to purchasing more at grocery, but key quality and convenience gaps must be addressed to be competitive. An interviewee reported, *I feel like they are always skimping on the ingredients, and after awhile, it gets embarrassing asking for more.* Supers also value ingredient transparency and having a wide variety of options, especially in side salad complements.



### What's the impact of a deli meat superconsumer?

Deli meat superconsumers are 12% of households who drive 34% of grocery sales and 7% of households who drive 27% food service sales. About 63% of all US households consume deli meat, 4.9 to 9.5 million of which are superconsumers. By implementing the first of our three recommendation waves, in-store sales could increase by \$75-\$200M and trips by 4%.

**79<sub>M</sub>**  
deli meat eating  
households

### How can this help grow the industry?

Now that we understand the motivations behind a purchase, we know how to give deli meat superconsumers more of what they want. By implementing the consumer-focused concepts that were developed, tested, and brought to life in our research, grocery can increase superconsumer spend and the spend of *potential* superconsumers— the 20% of households who really like deli meat, but spend less. These retail concepts are designed to maximize the opportunity with consumers already in the store, but they can also increase the number of weekly trips and basket size to help grocery capture its fair share of the food dollar.

#### To find out more

Become a [member](#) and attend [IDDBA 18](#).  
Visit [the superconsumer page at iddba.org](#)  
Read the full reports available in July 2018