IFMA

THE CONSUMER FOOD JOURNEY℠

DATASSENTIAL KINETIC 12

IFMA

FOOD FUTURE 2025™

Plan Your Path Forward

Three essential tools to drive business success.
All located in one, easy-to-use, online portal.

CONSUMER FOOD JOURNEY℠

NEW OPERATOR LANDSCAPE

GO-TO-MARKET MODEL

Fulfill the Consumer Journey

Use these new insights from IFMA, in collaboration with Datassential and Kinetic12, to deliver against the diverse landscape of consumer food triggers, occasions, and needs.

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socialize
Occasion

Where | When | Why | The decision sequence

7% of eating events | 60% AFH | 53% Planned

SOCIALIZE ACCOUNTS FOR 7% OF EATING EVENTS

HERE'S WHAT THOSE EVENTS LOOK LIKE.

(but remember, what consumers want isn't always the same as what they choose)

WHERE

insights around where consumers sourced their food, how they got it, and where they consumed it

40% sourced from home

60% sourced AFH

of those AFH events: 11% retail FS; 15% on-site; 83% restaurant

of those restaurant events: 54% large chain; 28% small chain; 18% independent

Decision Point
where they were when they made their decision to eat

Home	40%
Foodservice location	12%
Work	10%
School	3%
Someone else's home	11%
Public area	6%
In transit	7%
Out and about	8%
Other	4%

Consumption Point
where the food was actually consumed

Home	23%
Foodservice location	34%
Work	8%
School	3%
Someone else's home	9%
Public area	6%
In transit	5%
Out and about	7%
Other	4%

Segment Share

% of events sourcing from that type of venue

Finsights around where consumers sourced their food, how they got it, and where they consumed it

explore the data

learn more at www.ifmaworld.com
(coming Jan 2020)

IFMA has invested in providing research, insights and tools that can be leveraged to help IFMA members and the industry.

After an extensive RFP process, the IFMA strike team chose Datassential to conduct this study of 15,000 consumers on IFMA's behalf.

The research was fielded daily over a 12-month period from September 2018 to August 2019; this report is created by Datassential's custom research group.

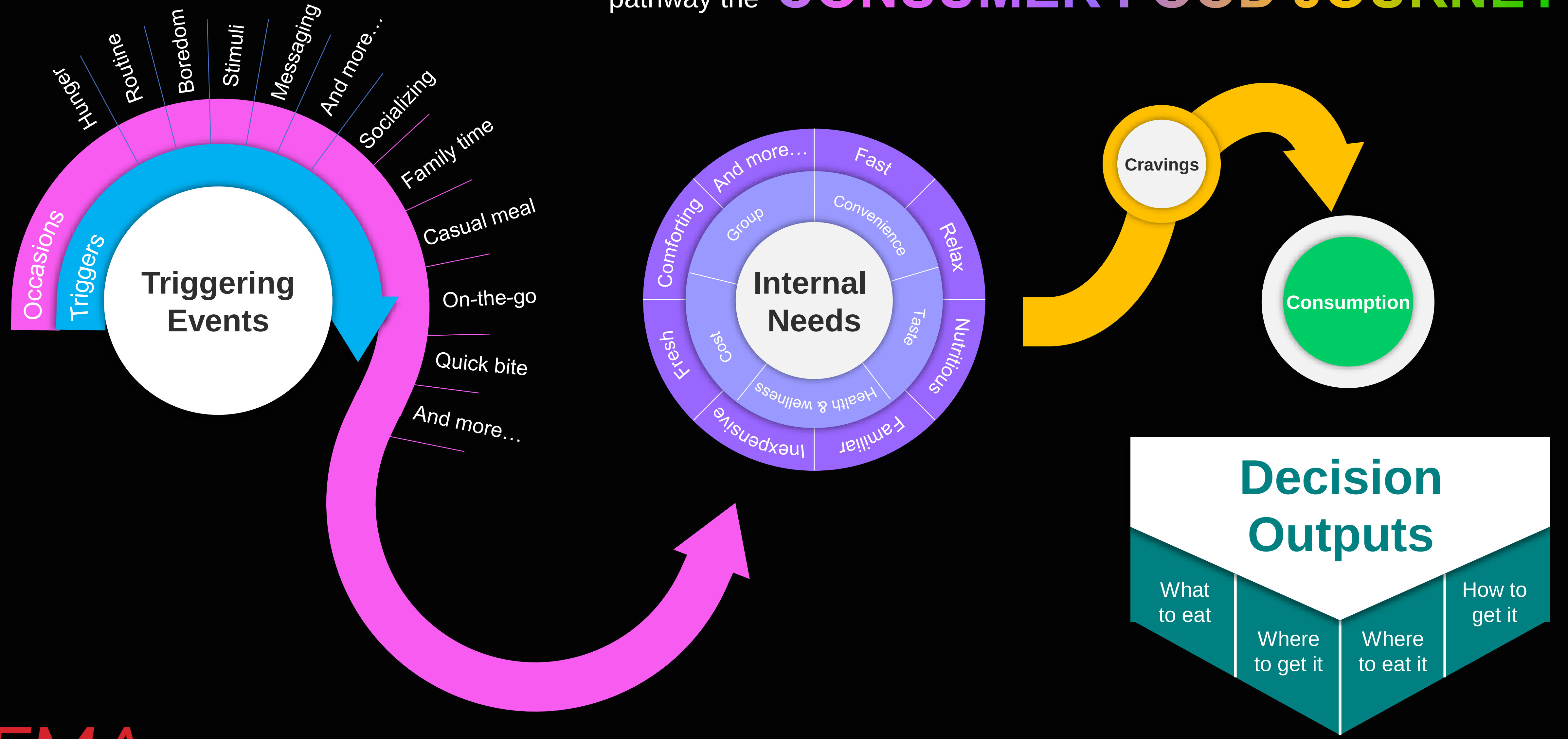
KINETIC 12

IFMA built through collaboration

16 manufacturers led the design of this initiative

Nestle Professional	Custom Culinary	Bigelow Tea
Cargill	Chobani	Georgia Pacific
High Liner Foods	Impossible Foods	Lyons Magnus
McCain Foods	Pepsico	Rich Products
Sargento	Smucker’s	Tyson Foods
Ventura Foods	… plus the support of hundreds of IFMA members	

People make eating decisions based on a nuanced sequence of interrelated factors. We call this pathway the **CONSUMER FOOD JOURNEY**SM



IFMA KINETIC 12

There’s good stuff in this report.

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the journey 13

triggers 18

occasions 23

needs 31

the decision 41

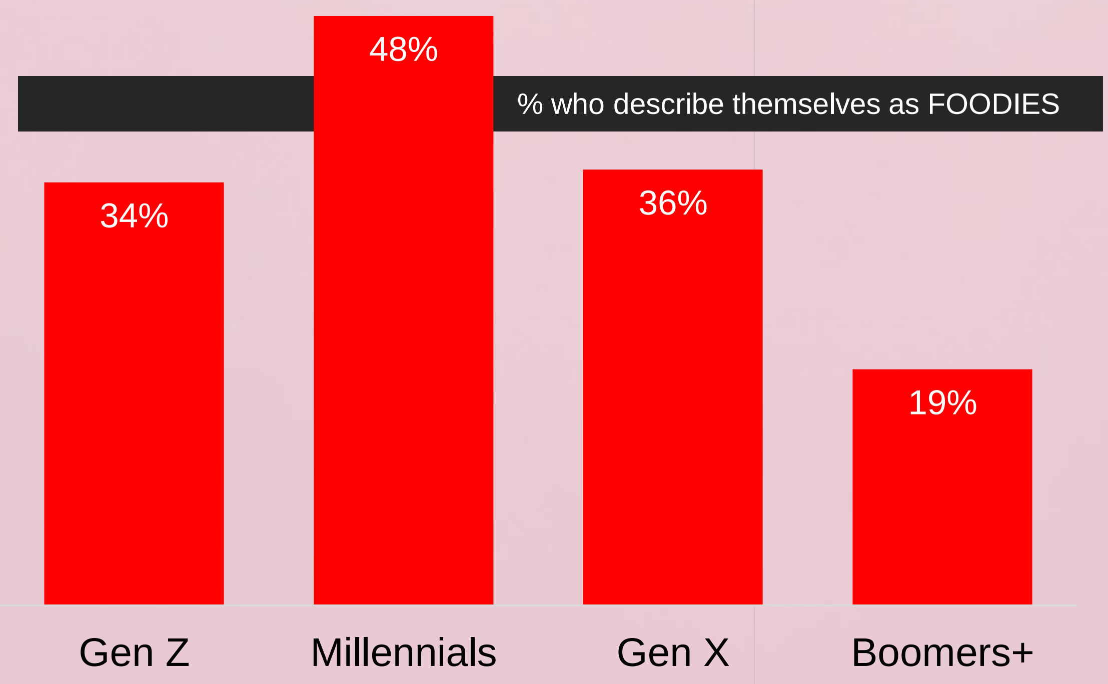
appendix: occasion details 48

THE HUNGRY CONSUMER

WHO'S THE FOODIE?

(it's millennials, mostly)

Fusion cuisine, farm-to-table, over-the-top Instagrambable F&B; just a few examples of how Millennials and their needs are radically changing the food industry today



EXPERIMENTAL MILLENIALS

As the foodie generation, Millennials love learning about new foods and like to try new things; they're always seeking the next new food trend. Bug protein, anyone?

"When it comes to ordering food at a restaurant..

I almost always like to try new things"

35% of **Millennials**

27% of **Gen X**

20% of **Gen Z**

11% of **Boomers+**

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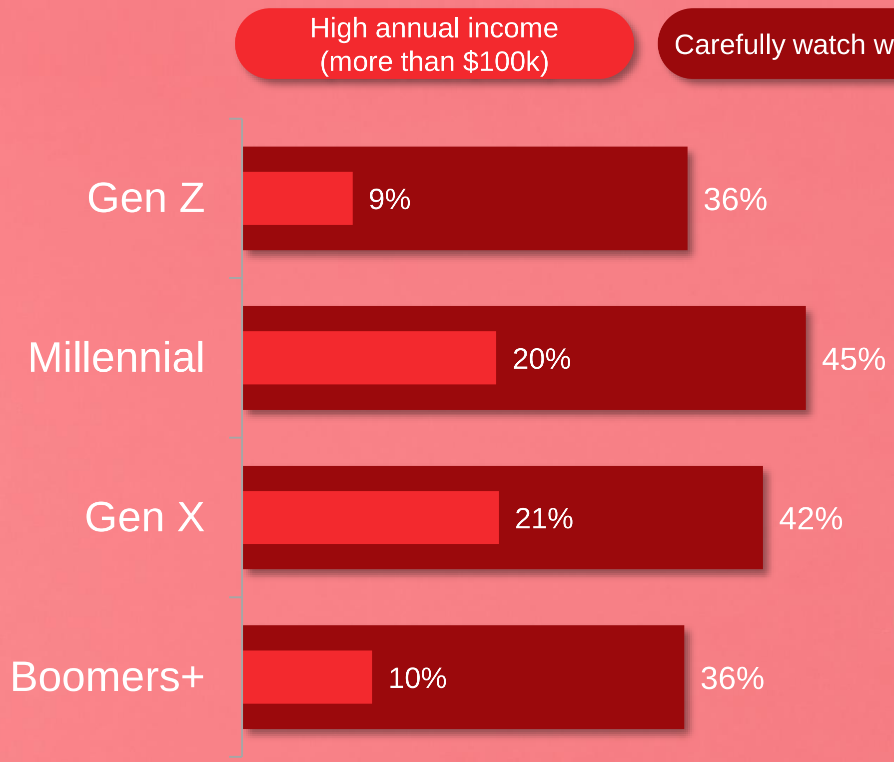
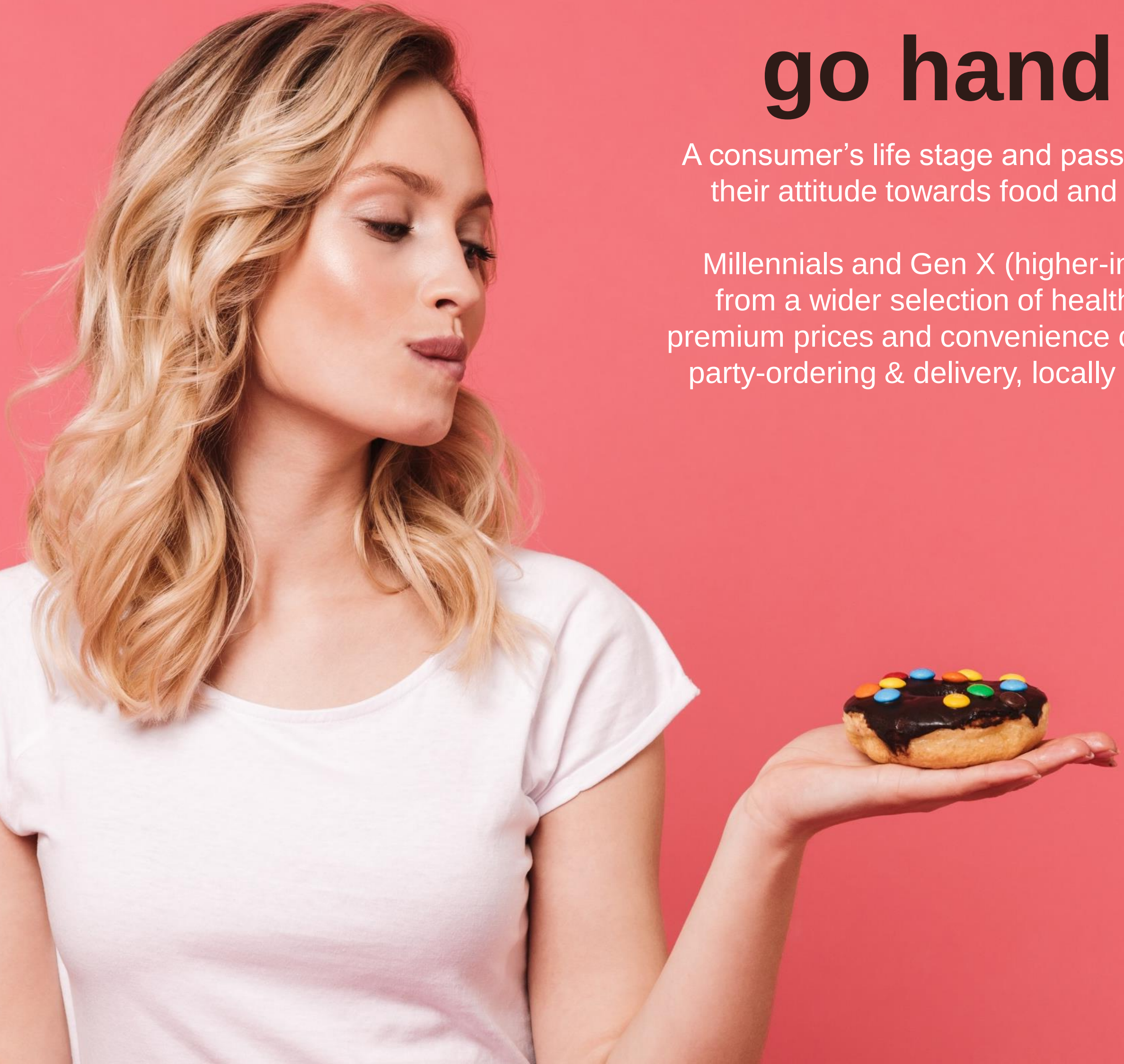


Cost and convenience go hand in hand

A consumer's life stage and passive income correlates with their attitude towards food and leading a healthy lifestyle.

Millennials and Gen X (higher-income consumers) benefit from a wider selection of healthy options; they can afford premium prices and convenience costs (e.g. meal kits, third-party-ordering & delivery, locally sourced ingredients, etc.).



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95%

of consumers eat meat (beef, chicken, pork, etc.)

only

24%

are trying to limit meat consumption

THE CASE FOR PLANT-BASED MEAT

Even with meat reduction in mind, meat eaters show very little signs of eliminating meat from their diets.

This gives way to an increasingly high demand for convenient & affordable alternatives that could provide the meat 'experience' without the meat; a space foodservice and retail are heavily competing in already.

The following consumer groups actively try to limit meat consumption*; however, they do not exclude it entirely

❖ high-income consumers (>$100K)	+9%
❖ urbanites	+6%
❖ foodies	+5%
❖ non-white consumers	+4%
❖ millennials	+3%

*NOTE: '+%' = difference versus total population

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The urban vs. rural divide often defines how people think about and consume food.
Here are a few key ways the groups differ.

URBANITES
are more likely to…

- Lead healthy lifestyles
- Consider themselves foodies
- Carefully watch what they eat
- Prefer dining out at restaurants
- Dine out frequently
- Actively limit meat consumption

VS

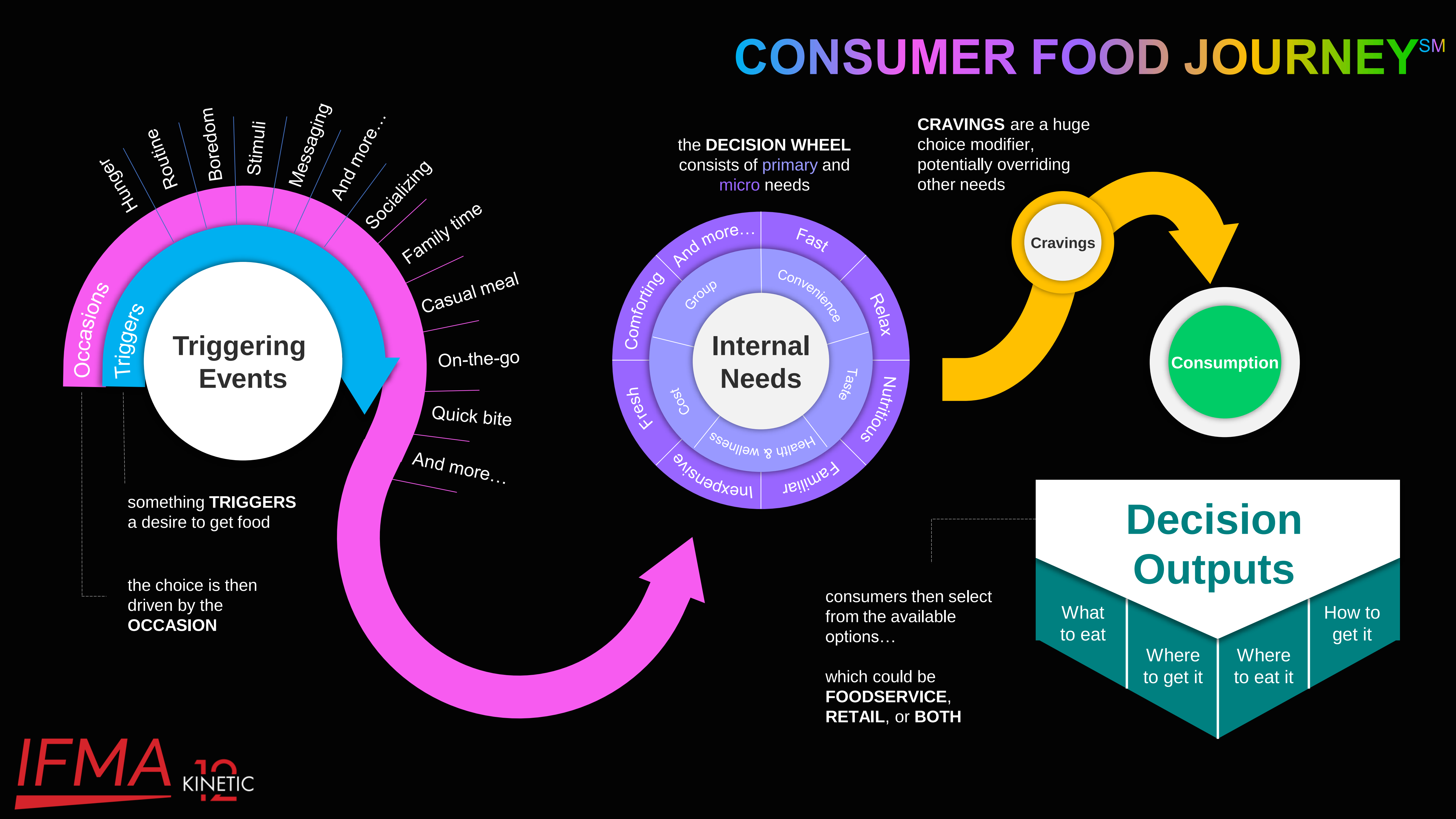
RURAL DWELLERS
are more likely to…

- Deprioritize healthy lifestyles
- Not get excited by food
- Not be concerned with what they eat
- Prefer cooking at home
- Rarely dine out
- Eat meat on a regular basis

THE JOURNEY

Triggers — Occasions — Needs — The Decision

Cravings


CONSUMER FOOD JOURNEY SM
Hunger
Routine
Boredom
Stimuli
Messaging
And more…
Socializing
Family time
Casual meal
On-the-go
Quick bite
And more…
Occasions
Triggers
Triggering Events
something TRIGGERS a desire to get food
the choice is then driven by the OCCASION
the DECISION WHEEL consists of primary and micro needs
Internal Needs
And more…
Fast
Relax
Nutritious
Familiar
Inexpensive
Fresh
Comforting
Group
Convenience
Taste
Health & wellness
Cost
CRAVINGS are a huge choice modifier, potentially overriding other needs
Cravings
Consumption
consumers then select from the available options…
which could be FOODSERVICE, RETAIL, or BOTH
Decision Outputs
What to eat
Where to get it
Where to eat it
How to get it
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The decision starts at home.

68% of the time, the impulse to eat begins when the consumer is at home. For foodservice organizations, this means having to overcome the appeal of those options already available in the consumer's home.

	5-11am	11am-3pm	3-5pm	5-11pm	11pm - 5am
At home	72.6%	61.8%	63.4%	74.2%	64.4%
At a foodservice venue	4.5%	5.0%	6.0%	4.9%	6.3%
At work	7.1%	14.0%	9.0%	4.0%	6.2%
At school	1.2%	1.5%	1.9%	0.7%	2.7%
At someone else's home	2.6%	2.9%	4.3%	3.5%	5.8%
At a public area	2.0%	1.8%	2.7%	1.8%	3.9%
In transit	5.1%	5.0%	5.1%	4.3%	4.6%
Out and about	3.3%	6.1%	6.1%	4.9%	5.0%
Other	1.7%	1.9%	1.5%	1.7%	1.0%

where were you when you initially decided that you wanted to have something to eat?

Cravings Lead, Venues Follow.

The food decision most often starts with “what to eat” – more so than “where to get it” or “where to eat it”.

WHAT’S THE FIRST DECISION MADE?

43%
the type of food
(dish, cuisine, etc.)

22%
where to get it
(home, restaurant, etc.)

21%
where to eat it
(place of consumption)

14%
how to get it
(in person, delivery, etc.)

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Regardless of the channel or occasion, it's the food itself that leads the decision.

WHAT'S THE FIRST DECISION MADE?

	Type of Food	Where to Get It	Where to Eat It	How to Get It
From Home	**48%**	19%	20%	13%
AFH	**36%**	26%	23%	15%
Quick Bite	**44%**	23%	19%	13%
Socializing	**32%**	22%	26%	20%
Family Time	**42%**	20%	23%	16%
On The Go	**34%**	28%	20%	18%
Special Occasion	**34%**	22%	25%	20%
Formal Meal	**38%**	22%	23%	18%
Multi-Tasking	**38%**	23%	22%	16%
Between Meals	**41%**	22%	20%	17%
Casual Meal	**46%**	20%	22%	12%

TRIGGERS

Triggers start the food journey – it's the impulse that activates the consumer's decision to eat

Triggers — Occasions — Needs — The Decision

Cravings

FOOD TRIGGERS

what catalyzes eating

Self was hungry	47%
Routine / time of day	29%
Craving	14%
Food was just there	10%
Pre-planned event	8%
Need a break	8%
Group was hungry	7%
Kids were hungry	6%
Thirsty	6%
Saw / smelled something	5%
Boredom	5%
Group was eating	5%
Messaging / Ad	3%

While ‘hunger’ and ‘routine’ are more likely to happen during lunch/dinner time, ‘cravings’ and ‘food just being there’ are likely to strike across *any* daypart.

This is could be explained by these triggers’ predisposition to happen spontaneously throughout the day.

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TRIGGER FREQUENCY	GENDER: Male	GENDER: Female	GENERATION: Gen Z	GENERATION: Millennial	GENERATION: Gen X	GENERATION: Boomers+	ETHNICITY: White	ETHNICITY: Non-white
Hungry	95	105	96	87	102	113	101	98
Routine	106	94	75	79	93	135	107	87
Craving	99	101	121	113	99	81	95	109
Food was just there	109	91	115	110	101	84	101	98
Pre-planned	108	92	115	123	94	78	102	97
Break	117	84	108	125	111	63	98	103
Group was hungry	99	101	138	123	99	65	99	102
Kids were hungry	93	107	66	171	124	22	91	116
Thirsty	111	89	148	133	97	54	93	113
Stimuli	106	94	162	153	97	30	94	110
Boredom	111	89	187	148	94	28	99	101
Group was eating	109	91	138	144	98	46	102	96
Messaging / Ad	131	71	125	165	110	19	97	106

TRIGGER FREQUENCY	INCOME: Low (under $49k)	INCOME: Medium ($50k- $99k)	INCOME: High ($100k+)	GEOTYPE: Urban	GEOTYPE: Suburban	GEOTYPE: Rural
Hungry	109	96	77	91	105	106
Routine	100	108	87	82	110	110
Craving	95	102	112	113	98	82
Food was just there	97	90	127	114	92	90
Pre-planned	83	105	154	118	91	87
Break	82	104	158	125	92	74
Group was hungry	87	99	146	115	94	84
Kids were hungry	83	95	182	137	80	75
Thirsty	85	95	162	139	79	76
Stimuli	81	93	183	146	79	62
Boredom	87	87	168	139	80	73
Group was eating	69	109	194	136	83	72
Messaging / Ad	55	95	277	176	62	44

INDEX VALUES SHOWN; figures above 110 indicate demo groups more frequently engaged in each TRIGGER

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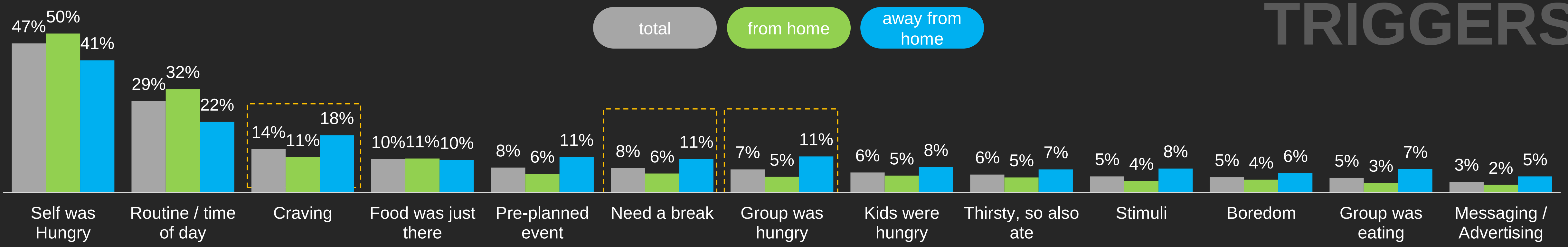
Eating at home tends to be associated with **hunger** and **routine**, while other catalysts tend to trigger away from home eating events. **Cravings** are a trigger foodservice companies can directly impact.

TRIGGERS

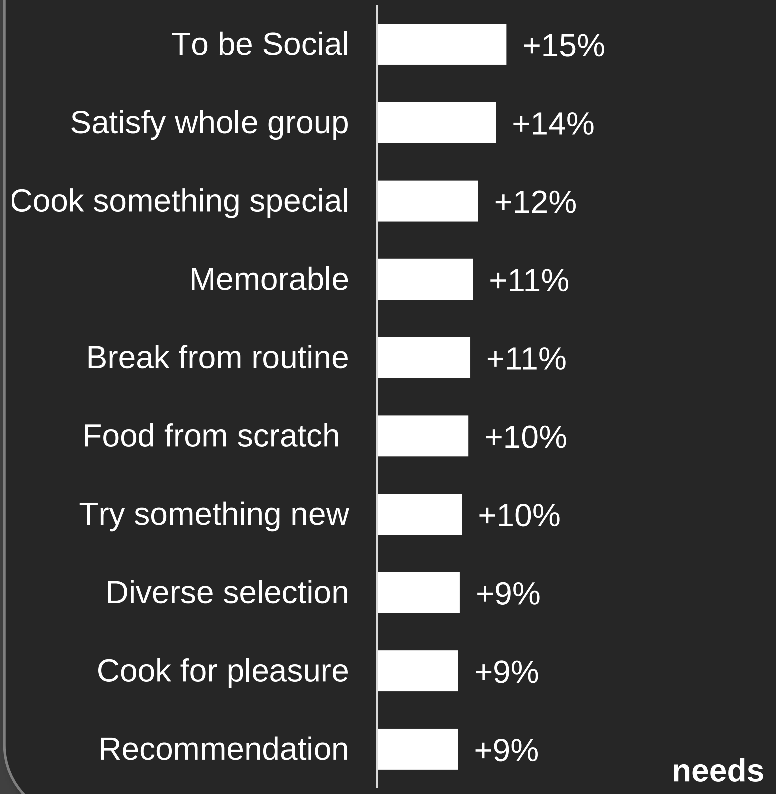


MAJOR NEEDS ARE SATISFIED BY DIFFERENT TRIGGERS

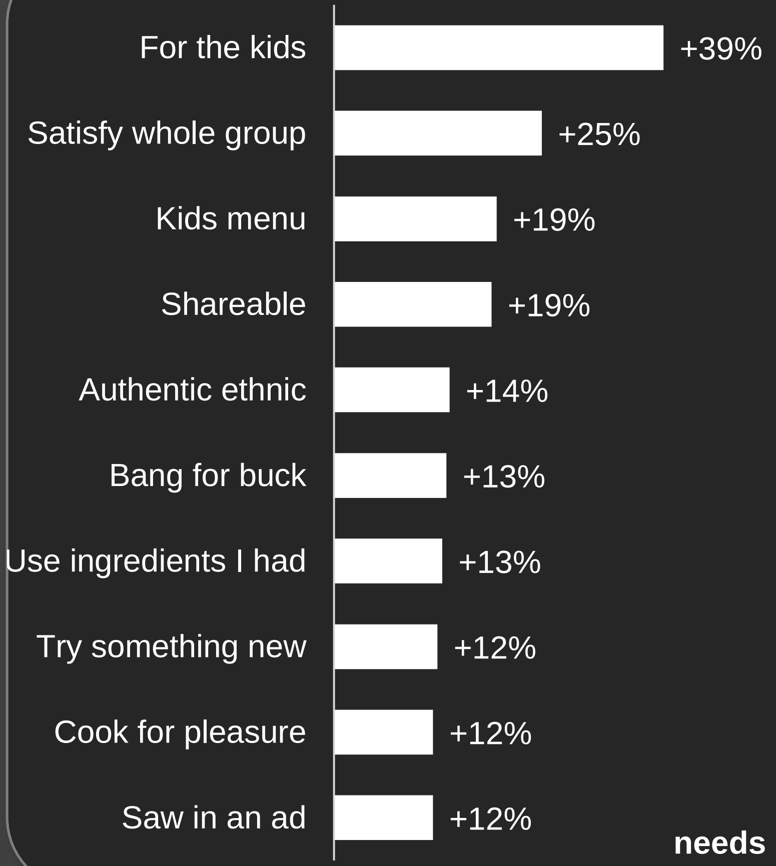
Each trigger aligns with very different intrinsic motivations (needs) that lead to unique food decisions each time a consumer embarks on a food journey.

PRE-PLANNED EVENT

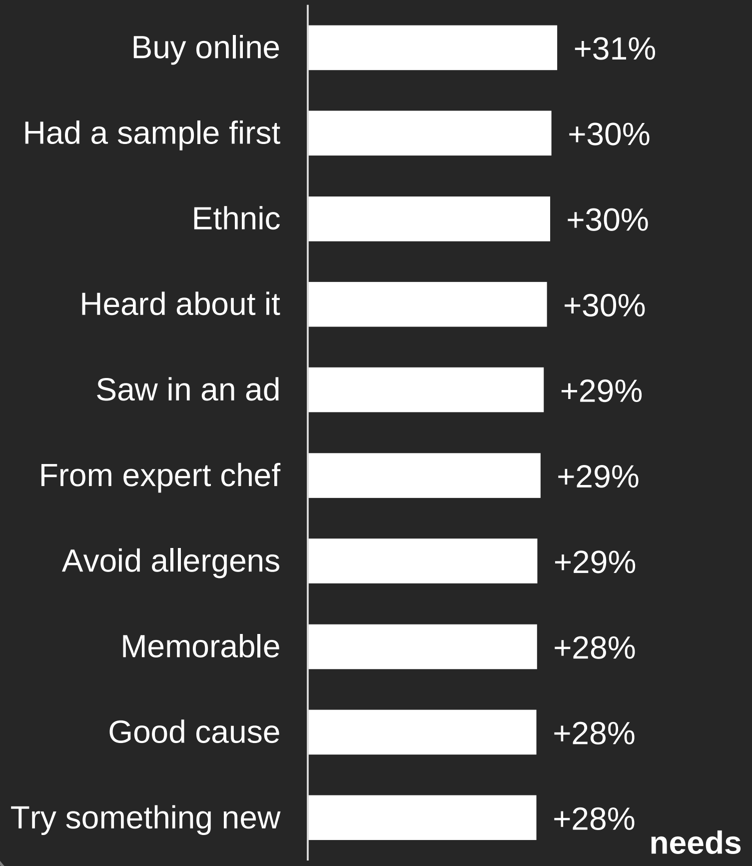
For example, a **pre-planned event** is more likely to satisfy the need to be social or satisfy the whole group.



KIDS WERE HUNGY

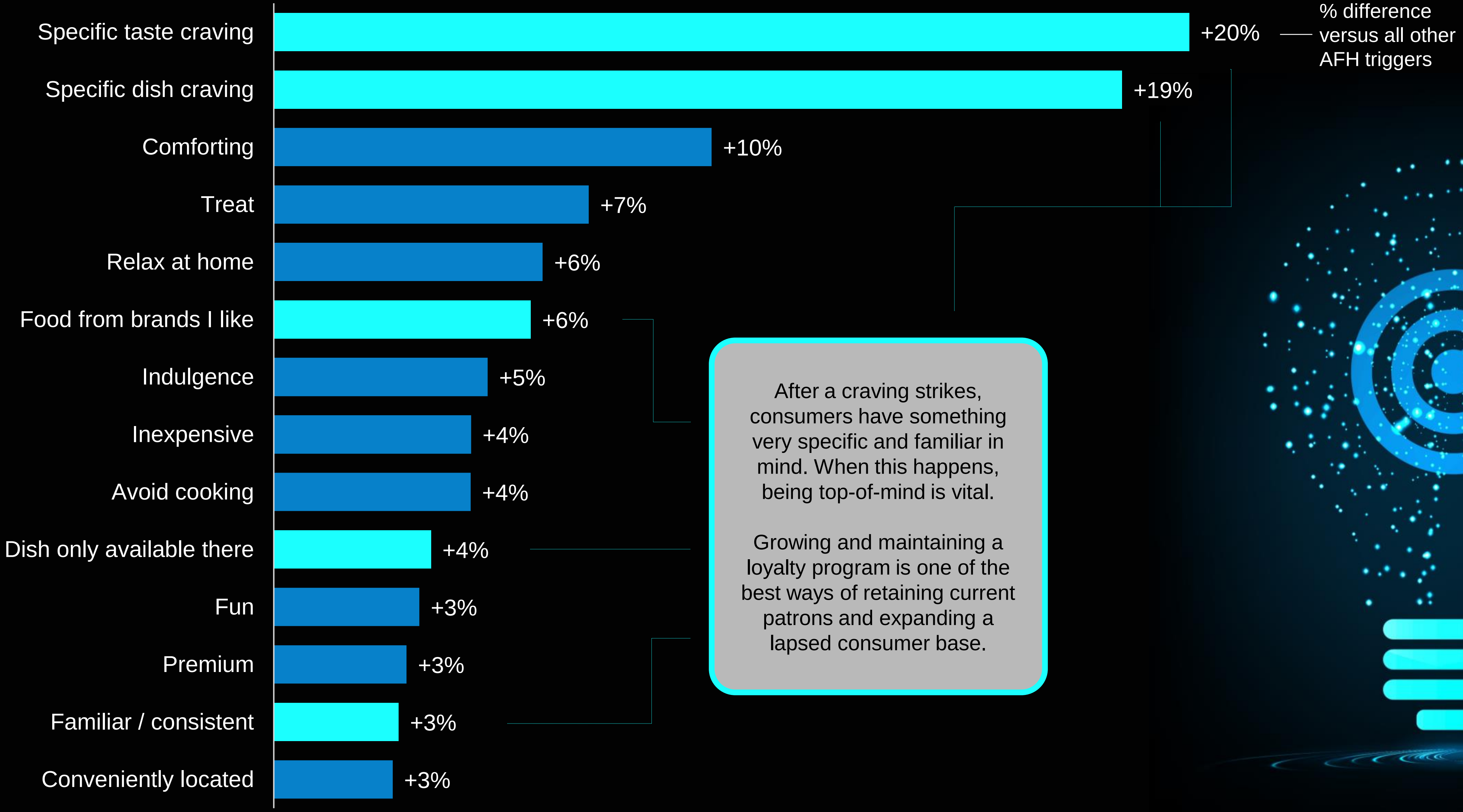


MESSAGING / AD



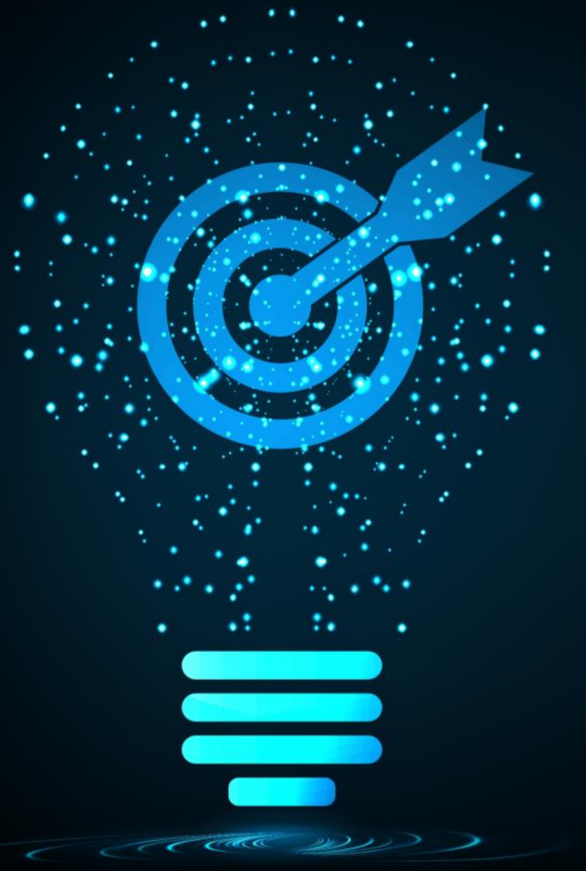
% difference versus all other AFH triggers

AWAY FROM HOME CRAVINGS: **MAJOR NEEDS**



After a craving strikes, consumers have something very specific and familiar in mind. When this happens, being top-of-mind is vital.

Growing and maintaining a loyalty program is one of the best ways of retaining current patrons and expanding a lapsed consumer base.



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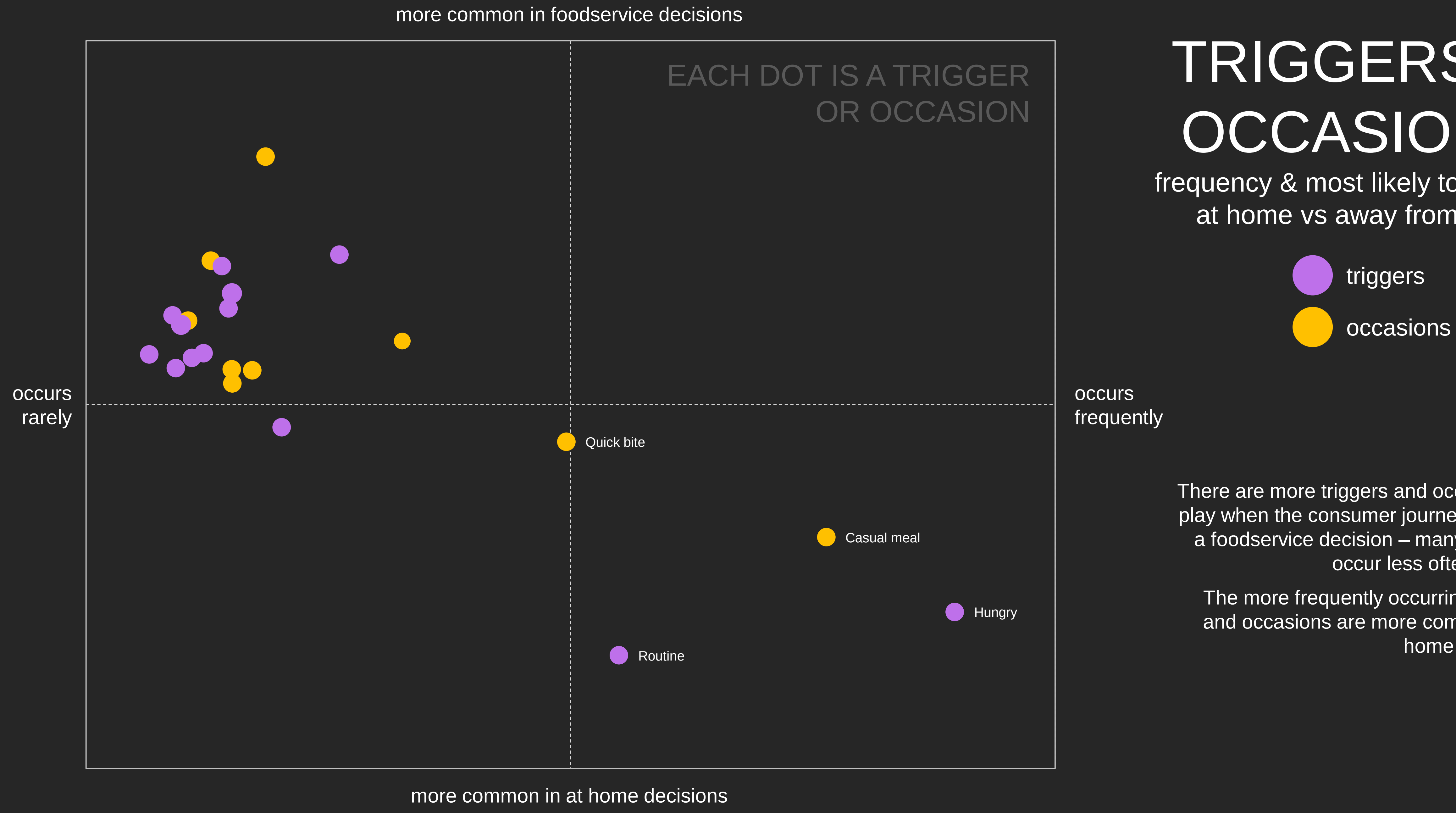
TRIGGERS & OCCASIONS

frequency & most likely to occur at home vs away from home



There are more triggers and occasions in play when the consumer journey leads to a foodservice decision – many of which occur less often overall.

The more frequently occurring triggers and occasions are more common in at home decisions

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OCCASIONS

Occasions define the scenario consumers face when making their eating decision

Now that they've decided they need to eat, what situation are they in?

Triggers — Occasions — Needs — The Decision

Cravings

OCCASIONS

contextualizing the eating event

After being triggered to eat, the next decision is framed around the scenario the consumer is faced with.

	occasion frequency
A casual meal	40%
A quick bite	26%
Family time	17%
On the go	10%
A formal meal	9%
A bite between meals	8%
Multi-tasking	8%
Socializing	7%
A special occasion	5%

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OCCASION FREQUENCY	GENDER		GENERATION				ETHNICITY	
	Male	Female	Gen Z	Millennial	Gen X	Boomers+	White	Non-white
Casual Meal	103	97	89	76	93	**132**	106	89
Quick Bite	97	103	**118**	107	103	84	99	101
Family	90	**109**	99	**120**	108	74	92	**114**
On-the-go	105	95	**137**	**141**	99	48	93	**112**
Formal Meal	**123**	78	88	**128**	**113**	65	92	**115**
Snack	105	95	108	**126**	104	69	98	104
Multi-tasking	103	97	**115**	**135**	105	57	98	104
Socialize	108	93	**142**	**140**	92	53	98	103
Special Occasion	**114**	86	**120**	**152**	98	44	101	99

OCCASION FREQUENCY	INCOME			GEOTYPE		
	Low (under $49k)	Medium ($50k- $99k)	High ($100k+)	Urban	Suburban	Rural
Casual Meal	104	101	83	89	106	106
Quick Bite	105	93	94	100	100	100
Family	90	103	**128**	108	92	102
On-the-go	88	106	**136**	**125**	88	81
Formal Meal	83	96	**172**	**137**	80	76
Snack	91	92	**146**	**120**	94	78
Multi-tasking	83	100	**163**	**124**	88	83
Socialize	82	100	**171**	**131**	87	74
Special Occasion	73	96	**215**	**148**	72	73

INDEX VALUES SHOWN; figures above 110 indicate demo groups more frequently engaged in each OCCASION

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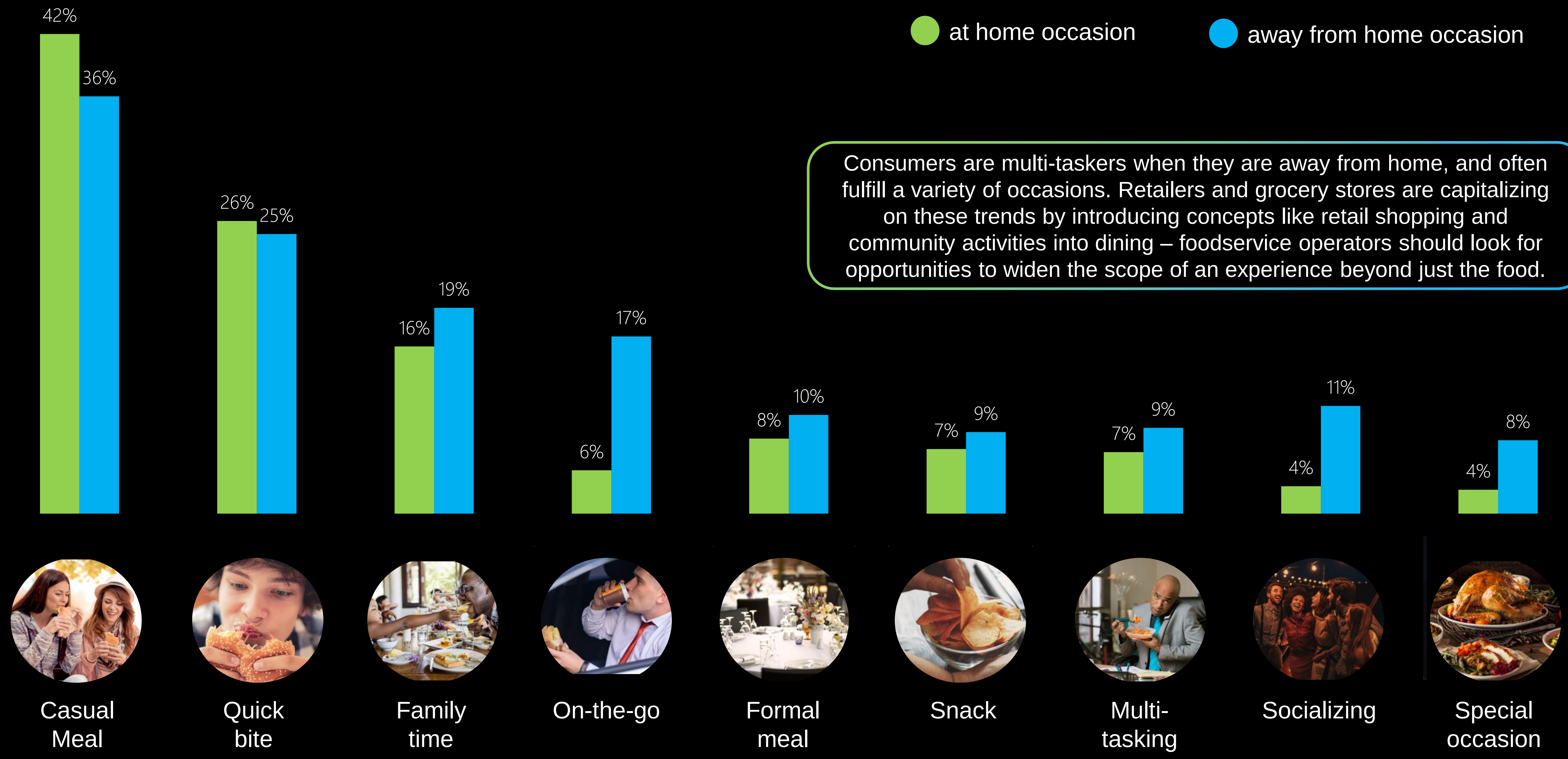
OCCASION FREQUENCY



Consumers are multi-taskers when they are away from home, and often fulfill a variety of occasions. Retailers and grocery stores are capitalizing on these trends by introducing concepts like retail shopping and community activities into dining – foodservice operators should look for opportunities to widen the scope of an experience beyond just the food.

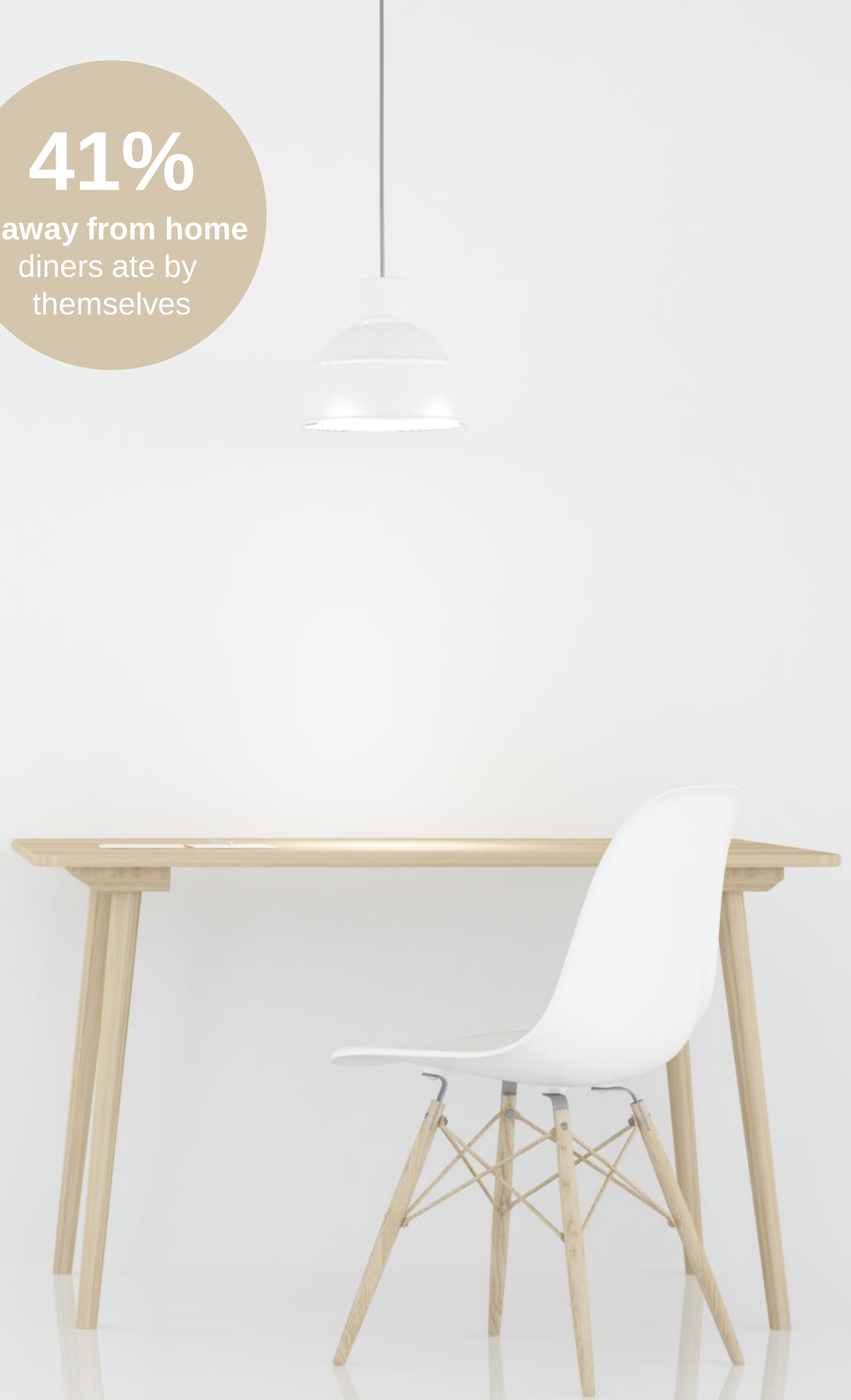
41%
of **away from home** diners ate by themselves

59%
of **at home** diners ate by themselves

SOLO EATING

Solo eating happens much more frequently during at home occasions. In order to motivate the solo diner towards foodservice events, consider their primary motivation: convenience (whereas group eating is driven by taste).

Self-serve kiosks, grab-and-go meals, mobile pay and other convenience-driven trends are ways of influencing solo diners towards foodservice dining. Or, bring the food to them with a third-party delivery partnership.



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TRIGGERS LINK TO OCCASIONS

Whereas TRIGGERS describe the impulse to eat, OCCASIONS provide context for the eating event itself – such as a "Quick Bite" or while "Multi Tasking". Triggers are the underlying motivators for eating, whereas Occasions describe the consumer's situation.

OCCASIONS

	Quick Bite	Socializing	Family Time	On The Go	Special Occasion	Formal Meal	Multi-Tasking	Between Meals	Casual Meal
Self was hungry	116	68	86	95	54	84	99	92	116
Kids hungry	57	118	189	102	156	126	124	118	60
Others in group were hungry	63	185	137	124	144	116	115	104	71
Routine / time of day	77	82	109	81	64	105	100	69	133
Boredom	101	137	79	125	166	117	172	176	47
Food just there, so ate it	112	121	87	105	139	103	128	131	71
Saw / smelled something	71	179	93	130	188	132	138	155	58
With a group that was eating	48	261	118	98	291	137	122	115	51
Pre-planned event	48	203	136	94	278	138	104	93	65
Needed a break	102	129	78	136	155	106	157	157	58
Advertising / message	62	190	92	130	246	158	156	148	45
Craving	110	117	87	121	106	96	106	142	79
Thirsty, so also ate	88	152	84	136	181	115	151	151	57

TRIGGERS

INDEX VALUES SHOWN; figures above 110 indicate triggers that are more highly correlated with that type of eating occasion

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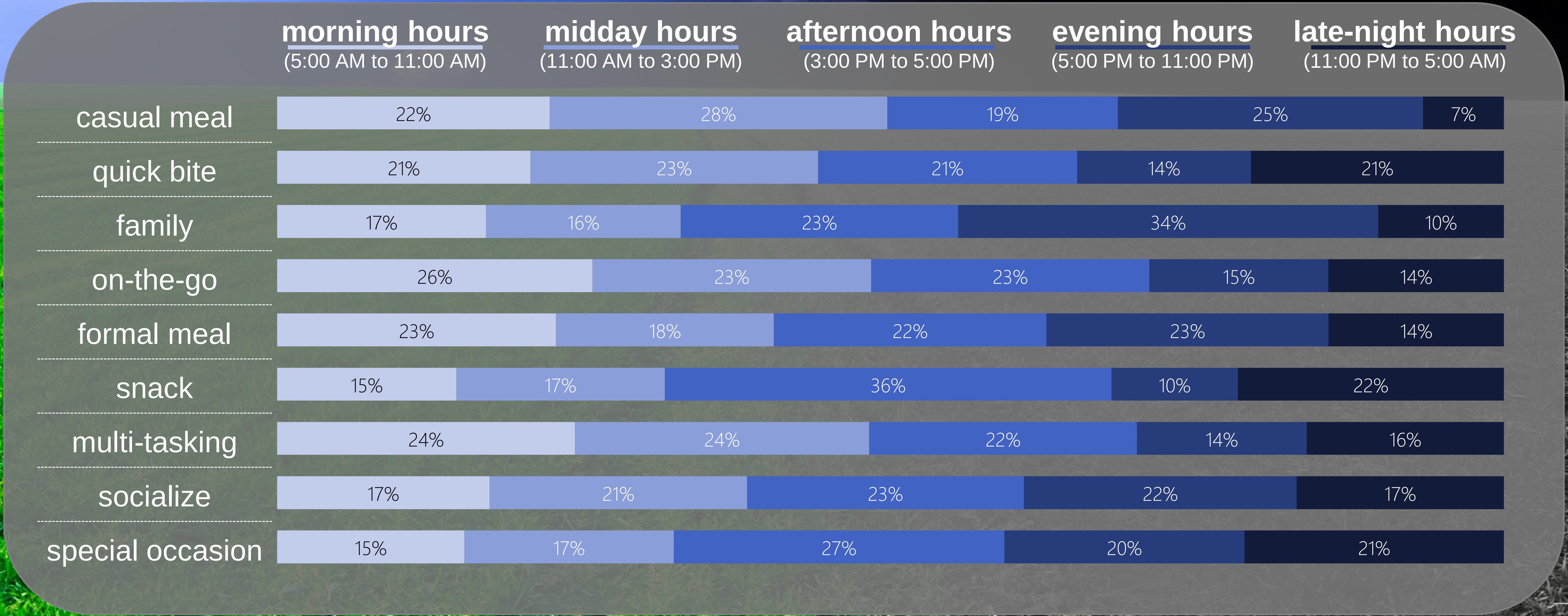
LATE NIGHT EATS

Late night eating events tend to just be quick bites or snacks rather than a full meal; keep late night menus light with bites to help satisfy consumer’s late-night cravings.



OCCASIONS

By demography

		Gen Z	Millennial	Gen X	Baby Boomers+	Low income (under $49k)	Medium income ($50k-$99k)	High income (more than $100k)	Urban	Suburban	Rural
40%	casual meal	86	74	84	111	92	93	79	83	96	90
26%	quick bite	118	107	103	84	105	93	94	100	100	100
17%	family	99	120	108	74	90	103	128	108	92	102
10%	on-the-go	137	141	99	48	88	106	136	125	88	81
9%	formal meal	88	128	113	65	83	96	172	137	80	76
8%	snack	108	126	104	69	91	92	146	120	94	78
8%	multi-tasking	115	135	105	57	83	100	163	124	88	83
7%	socialize	142	140	92	53	82	100	171	131	87	74
5%	special occasion	120	152	98	44	73	96	215	148	72	73

INDEX VALUES SHOWN; figures above 110 indicate demo groups more frequently engaged in each occasion

i.e. Millennials are much more likely to have an occasion on-the-go or to be socializing than total consumers

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NEEDS

Needs describe the range of motivations consumers consider when forming their decision

Now that consumers are aware of their current situation; what motivations stem from their initial trigger and occasion?

Triggers — Occasions — Needs — The Decision

Cravings

MEGA NEEDS

which one key need guides consumer choice?

Convenience wins overall, but the patterns change depending on time of day.

Taste is champion in the evening, while the importance of health declines as the day goes on.

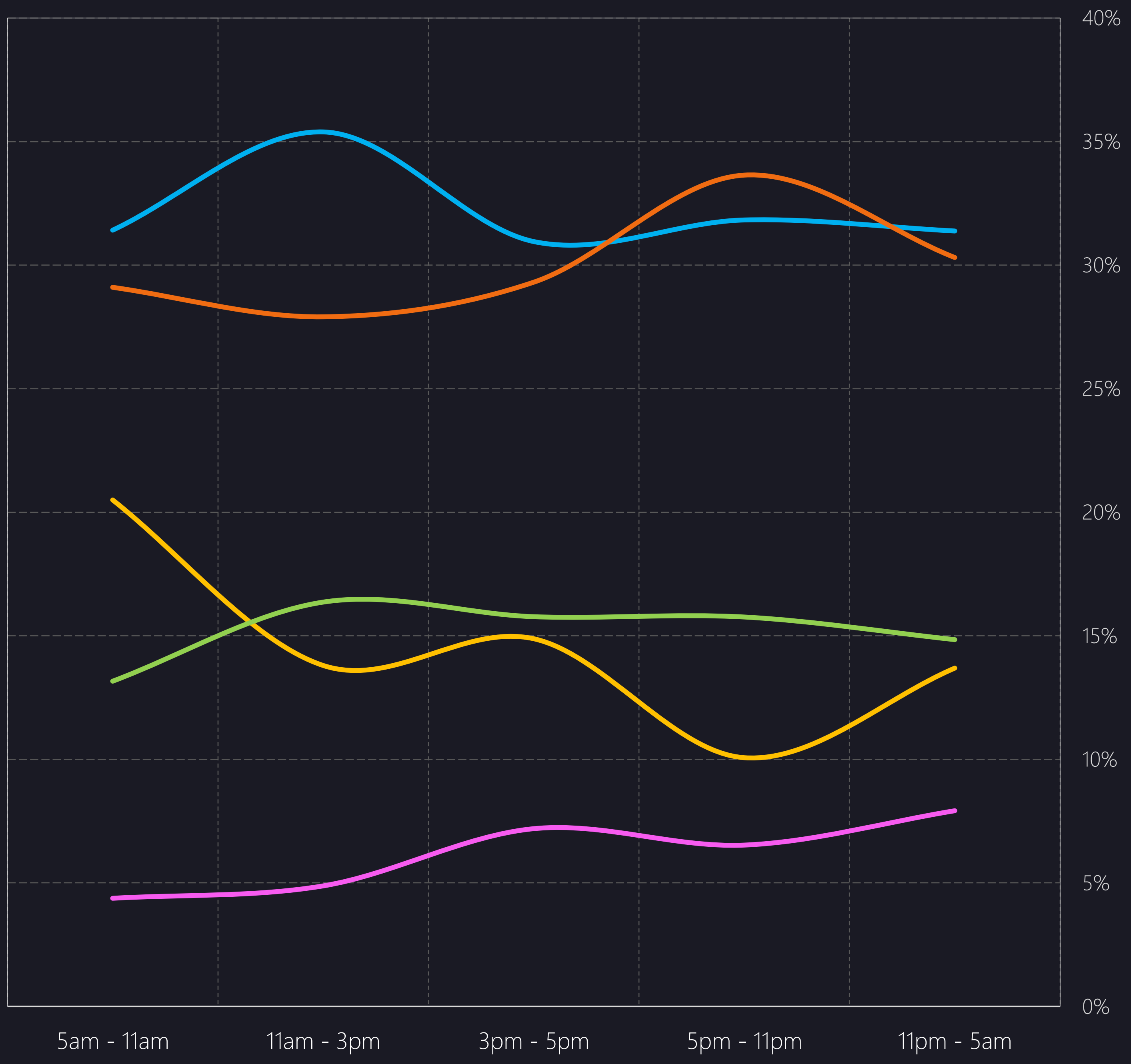
convenience 32%

taste 30%

health & wellness 15%

cost / value 15%

group 6%



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MEGA NEED FREQUENCY	GENDER: Male	GENDER: Female	GENERATION: Gen Z	GENERATION: Millennial	GENERATION: Gen X	GENERATION: Boomers+	ETHNICITY: White	ETHNICITY: Non-white
Convenience	101	99	90	91	102	**110**	105	91
Taste	98	102	103	92	96	**110**	99	102
Health & wellness	97	103	87	107	100	99	92	**114**
Cost / value	103	97	**117**	**117**	104	73	97	105
Group	102	98	**140**	**139**	98	50	103	95

MEGA NEED FREQUENCY	INCOME: Low (under $49k)	INCOME: Medium ($50k- $99k)	INCOME: High ($100k+)	GEOTYPE: Urban	GEOTYPE: Suburban	GEOTYPE: Rural
Convenience	105	99	82	88	105	**111**
Taste	98	104	99	99	102	97
Health & wellness	91	103	**125**	**114**	94	89
Cost / value	**109**	92	84	107	94	99
Group	72	105	**191**	**125**	90	78

INDEX VALUES SHOWN; figures above 110 indicate demo groups more frequently engaged in each MEGA NEED

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Mega Needs + Segments

Consumers are primarily turning to retail segments when their decision-making is driven by convenience and health & wellness; foodservice segments are the go-to when consumers are motivated by cost and taste.

Convenience	traditional grocery store aisle mass merchant traditional grocery prepared food
Taste	casual dining traditional grocery store aisles fast casual
Health & Wellness	club store school cafeteria specialty grocery aisles
Cost	QSR fast casual c-store prepared food
Group	hospital cafeteria fine dining school cafeteria

*NOTE: highest indexing segments for that need
compared to all other needs

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COMPETING ON CONVENIENCE

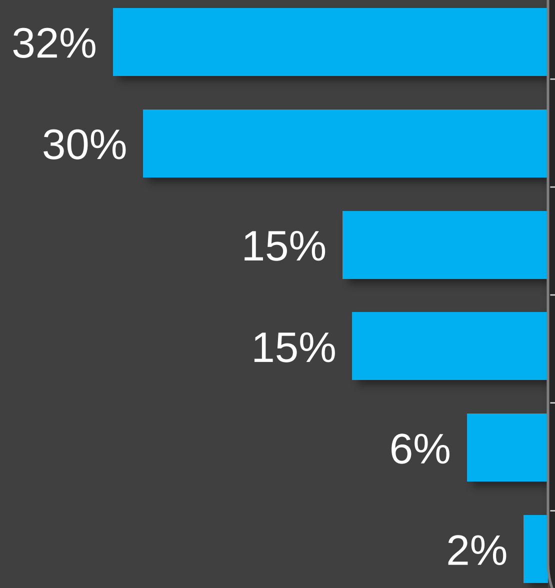
Convenience is the primary motivator for **32%** of eating events. When consumers want convenience, they are MORE LIKELY to…

choose an at-home occasion	+7%
make a spontaneous decision	+13%
eat by themselves	+14%
eat prepared / ready-to-eat products	+20%

NOTE: % difference compared to all other needs

MEGA NEEDS

the single most important factor in consumer choice differs by demographic factors like age, income, and where consumers live.



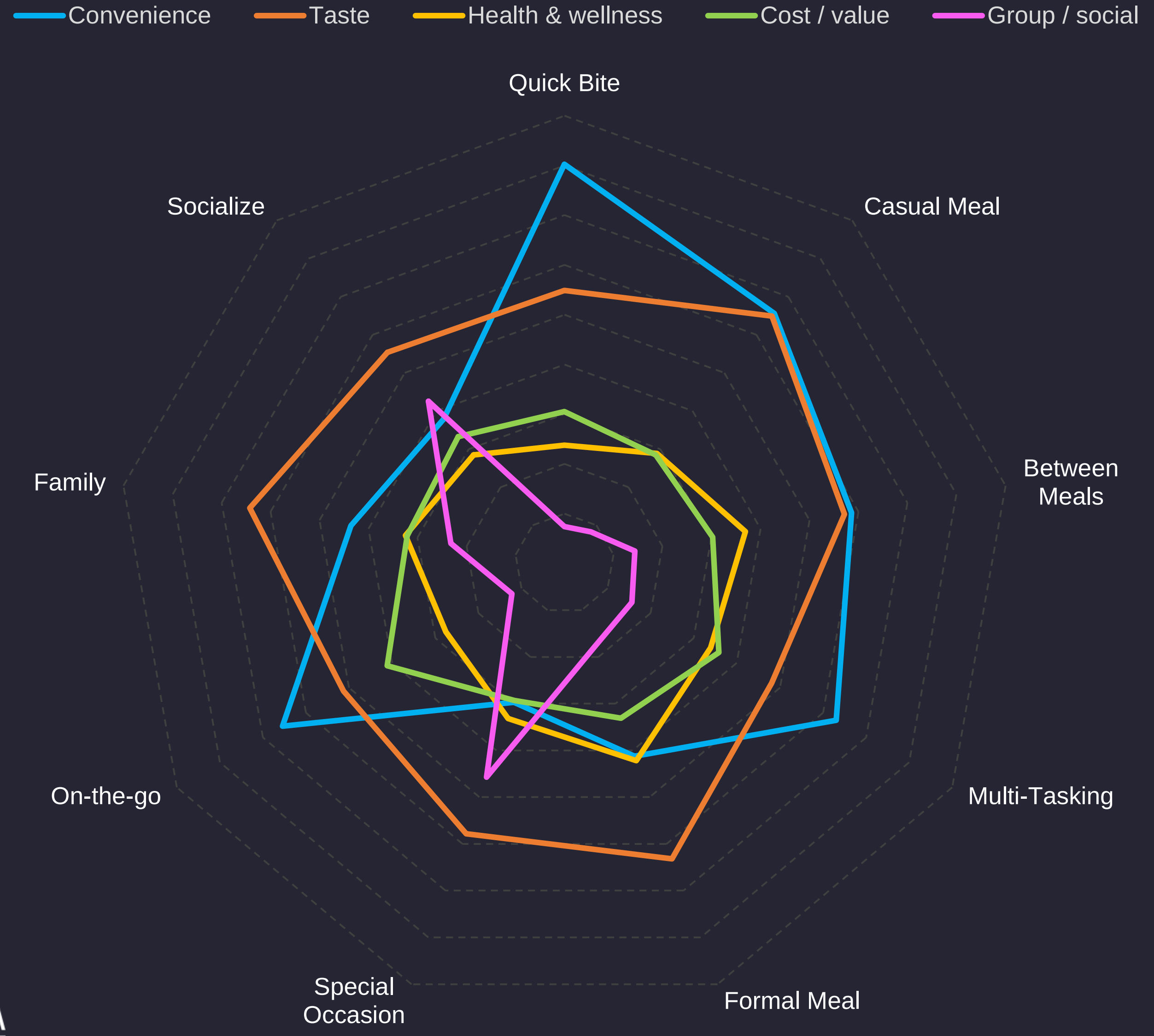
	Gen Z	Millennial	Gen X	Baby Boomers	Low income (under $49k)	Medium income ($50k-$99k)	High income ($100k+)	Urban	Suburban	Rural
Convenience	90	91	102	**110**	105	99	82	88	105	**111**
Taste	103	92	96	**110**	98	104	99	99	102	97
Cost / value	87	107	100	99	91	103	**125**	**114**	94	89
Health & wellness	**117**	**117**	104	73	**109**	92	84	107	94	99
Group	**140**	**139**	98	50	72	105	**191**	**125**	90	78
Other	61	54	94	**163**	**121**	73	68	74	**111**	**124**

Young consumers are more often driven to choose a food based on health & wellness and what their group is doing, while boomers are driven more frequently by convenience and taste.

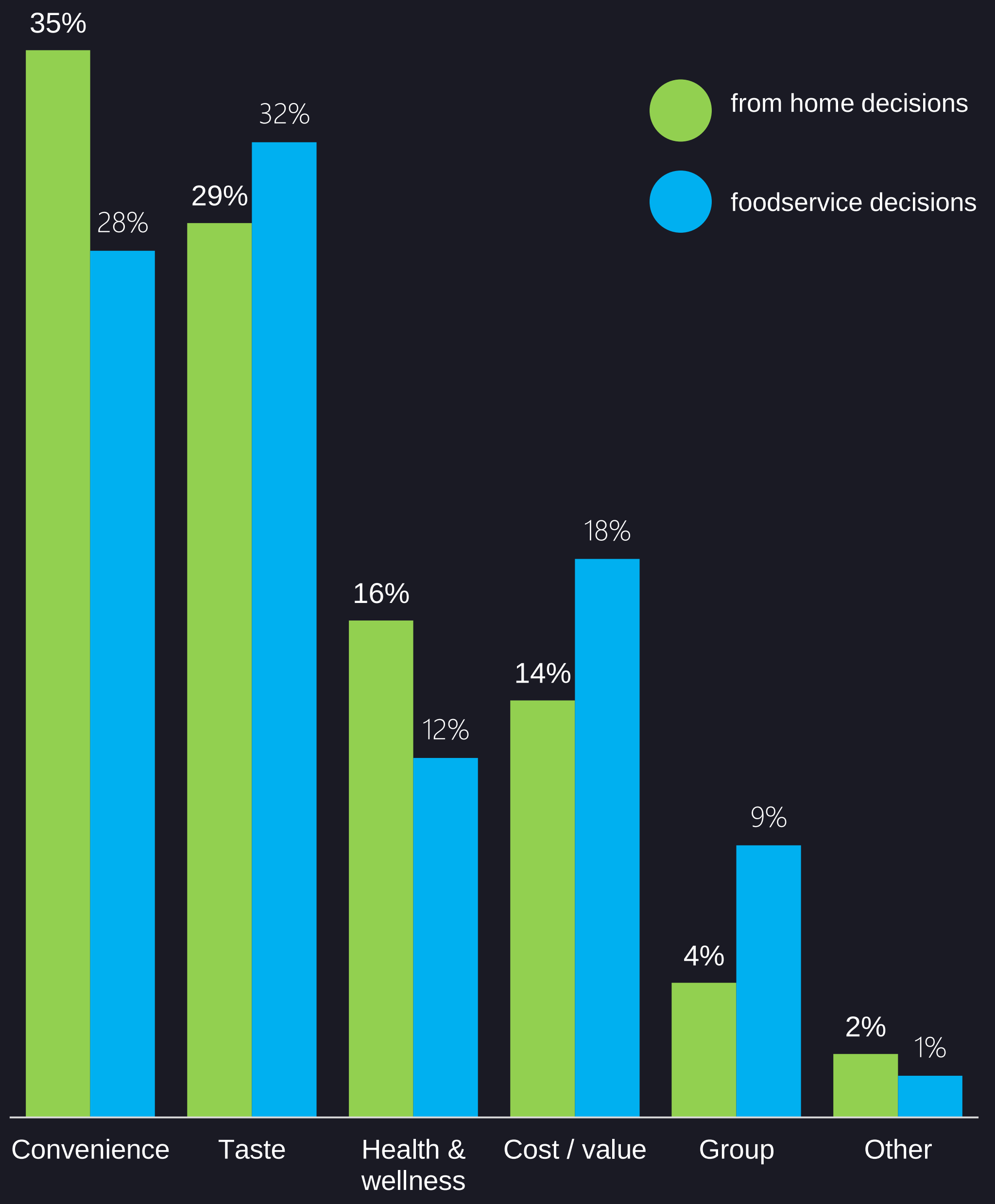
INDEX VALUES SHOWN; figures above **110** *indicate demo groups that are highly motivated by each need.*

Occasions + Mega Needs

Context is vital, as Mega Needs shift greatly from one occasion to the next. Health, affordability, and taste are baseline needs with similar importance across occasions; convenience and group needs are more likely to vary by occasion.



IMPORTANCE



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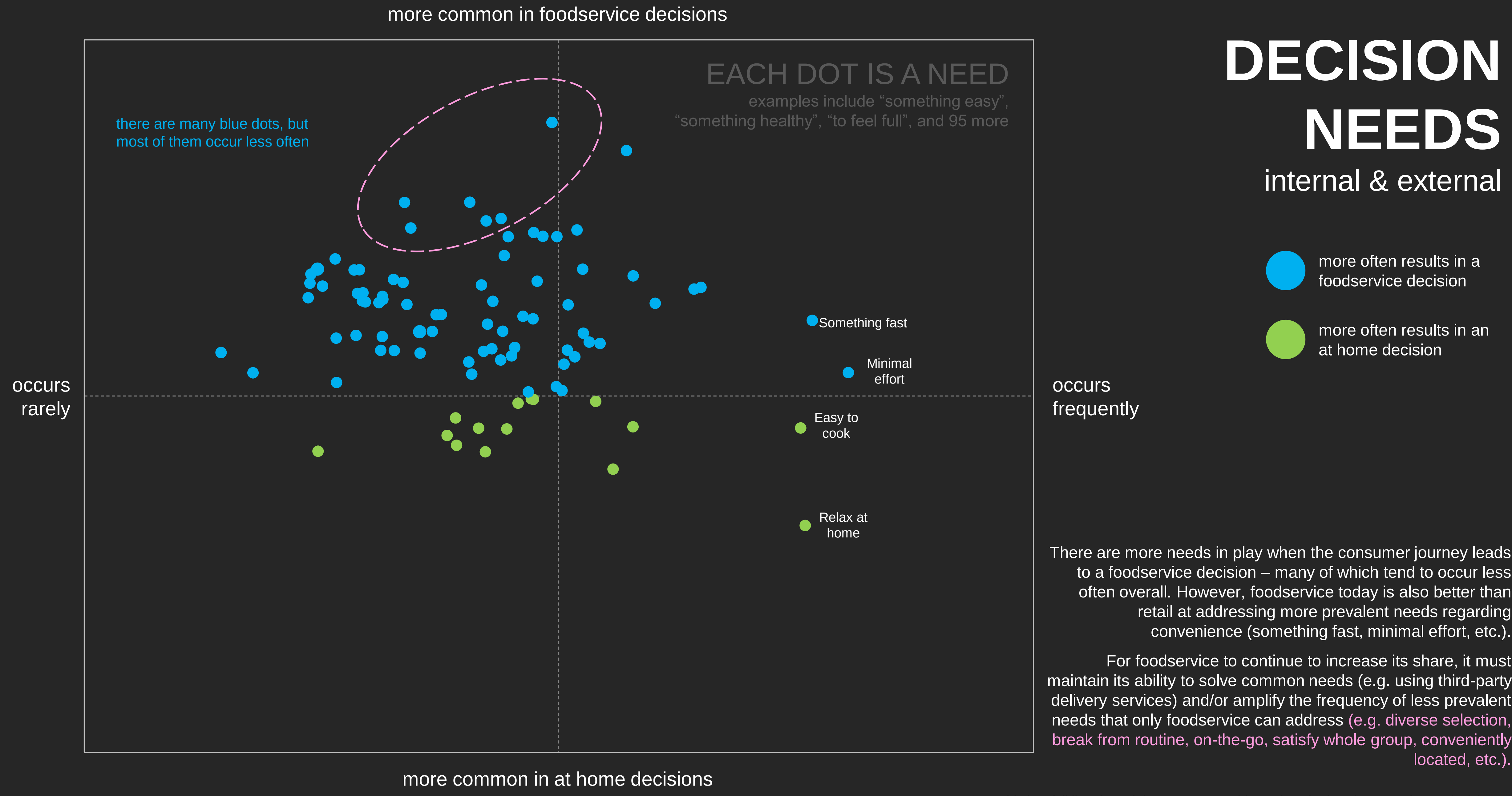
DECISION NEEDS

internal & external



There are more needs in play when the consumer journey leads to a foodservice decision – many of which tend to occur less often overall. However, foodservice today is also better than retail at addressing more prevalent needs regarding convenience (something fast, minimal effort, etc.).

For foodservice to continue to increase its share, it must maintain its ability to solve common needs (e.g. using third-party delivery services) and/or amplify the frequency of less prevalent needs that only foodservice can address (e.g. diverse selection, break from routine, on-the-go, satisfy whole group, conveniently located, etc.).

NOTE: this is a full list of need that can reasonably apply to both at-home and AFH decisions

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NEEDS

98 factors that influence the consumer food journey[SM]

Easy to cook	52%
Minimal effort	51%
Fast	48%
Use ingredients I had	47%
Quick to cook	46%
Relax at home	42%
Satiates	42%
Familiar	40%
Specific taste craving	37%
Inexpensive	36%
Comforting	36%
Something hot	35%
Habit	35%
Customer service	35%
Avoid cooking	33%
Nutritious	33%
Fresh	32%
Dish only available there	32%
Lots of choices	32%
Specific brand	32%
Delivery / carryout	32%
Customizable menu	31%
Specialty item	31%
Reliable take-out packaging	30%
Dish I can't make at home	30%
Relax	30%
Healthy	30%
Well-balanced	30%
Fun	29%
Easy to digest	29%
Satisfy whole group	29%
Conveniently located	29%
Highest quality	29%

Light	29%
Varying menu	29%
Best value	28%
One dedicated cuisine	28%
It was just there	28%
Bang for buck	28%
Avoid waiting	28%
Coupon / deal	27%
Was too hungry to care	27%
Food from scratch	27%
Limited options	27%
Not messy	27%
Energy	26%
To be alone	26%
Premium	26%
Tide over	25%
Treat	25%
Online ordering	25%
Kids menu	25%
Payment options	25%
Natural	25%
On-the-go	24%
Indulgence	24%
Hearty	24%
Specific amenity	24%
Staff recommendation	23%
Split checks	23%
Shareable	23%
Advanced reservations	23%
Avoid undesirable ingredients	22%
Break from routine	21%
Best ingredients	21%
Watch weight	21%

Diverse selection	21%
Had a sample first	20%
Avoid shopping	20%
Good for weather	20%
For the kids	19%
Specific dish craving	19%
Enough for leftovers	19%
Splurge	18%
Use leftovers	18%
Memorable	18%
Less / no meat	18%
Authentic ethnic	18%
Sustainable	18%
To be social	18%
Seasonal ingredients	17%
Avoid allergens	17%
Recommendation	17%
Try something new	17%
Nostalgic	16%
Ethnic	16%
Something cold	16%
Use apps on my phone	15%
Vegan / vegetarian	15%
Cook for pleasure	15%
Good cause	14%
Heard about it	14%
From expert chef	14%
Saw in an ad	14%
Buy online	13%
Cooking with someone	8%
Cook something special	8%
Specific recipe	6%

the **NEEDS** that skew most heavily toward foodservice or from home events

how often that need occurs overall

does it happen more in foodservice or from home events?

	Frequency	Gap
To avoid having to cook	33%	+18%
Something I could have on-the-go	24%	+16%
To satisfy a craving for a specific taste / food	37%	+16%
To treat / reward myself	25%	+15%
Lots of choices / a diverse selection	21%	+15%
The best value / deal I could find	28%	+14%
A break from my normal routine	21%	+13%
To use apps on my phone / tablet (recipes, coupons, ordering, etc.)	15%	+13%
To relax / wind down	30%	+12%
Something to splurge on	18%	+12%
To order online	25%	-2%
Something easy (minimal effort)	51%	-3%
There were limited options at that time	27%	-3%
Nothing; it was just habit / my routine	35%	-3%
To relax at home	42%	-7%

these needs occur more often with foodservice events

these needs occur more often with at home food events

While the gap for 'relaxing at home' is heavily indicative of an at home event, it remains a very important need for foodservice events as well (top-15 need)

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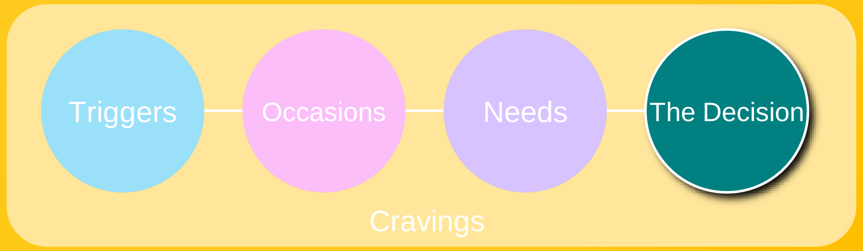
THE DECISION

Triggers, occasions, and needs culminate in a food **DECISION** – where to eat, what to have, how to get it, and more

Consumers are finally ready to make decisions about their eating event.



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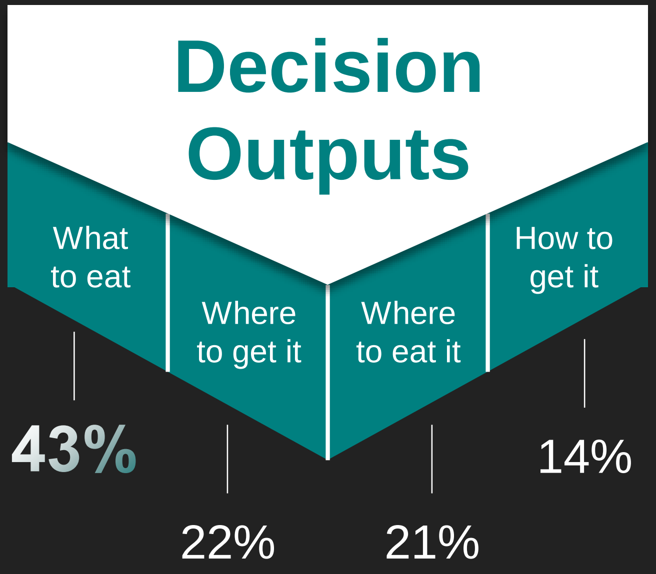
CONSUMER FOOD JOURNEY℠

FIRST THINGS FIRST

Nearing the end of the journey, consumers are left to make their final selections. In most cases, the first consideration is ‘**what kind of food to eat**’.



KINETIC 12

NOTE: % represents the frequency of consumers selecting each item first

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MOST PATHS ARE UNIQUE

There are many factors that influence the choices made during any given part of the journey; this makes it very likely for consumers to experience very different paths and choices each time they embark on a food journey.

TRIGGER: Messaging / Ad

The food is likely to come from foodservice	+37%
Motivated to buy food online	+31%
Almost always like to try new things	+29%
Saw in an ad	+29%
Finances are not an issue; dine out freely	+27%
Likely to look online for information about a restaurant	+27%
Want something to splurge on	+26%
Likely to use a coupon for the food order	+26%
Likely to be derailed by a craving	+25%
Likely for the food to come from fine dining	+20%

OCCASION: Special Occasion

Prepare food for you and others	+40%
Food made for you by someone else	+35%
Use an oven to prepare food at home	+30%
Motivated to have a memorable moment	+30%
Use a mobile smartphone app (for coupons, recipes, etc.)	+25%
The food is likely to come from foodservice	+24%
Motivated to cook something special	+24%
Follow a recipe from memory	+23%
Motivated by being social	+23%
Typically with 2 people	+22%

NEED: Health & Wellness

Motivated to eat something healthy	+31%
Motivated to eat something nutritious	+31%
Considered getting food from home after getting food from restaurant	+15%
Looked online for information about the food	+14%
Actively limit the amount of meat eaten	+11%
Motivated to make food from scratch	+11%
Likely to eat a product that requires no preparation	+10%
The food came form very close by	+10%
Likely to be the primary decision maker	+10%
More likely to make all the food from scratch	+9%

% difference versus all other triggers, occasions, needs

SPECIFIC DISHES OUTWEIGH CUISINE

When deciding the type of food to eat, consumers consider the specific dish/food item (e.g. sandwich, lasagna, etc.) **more important** than the type of food/cuisine (e.g. Italian, Mexican, etc.). This is especially true for AT HOME eating events.

59%
think of **a dish** first

SPECIFIC DISH

41%
think of **cuisine** first

TYPE OF FOOD

FOOD EATEN

by time of day

Morning	frequency
Breakfast main dishes	58%
Breakfast bakery	25%
Yogurt / parfait / smoothie	13%
Sweet snacks	10%
Bread / rolls	9%

Midday	frequency
Sandwich / panini / wrap (hot or cold)	20%
Breakfast main dishes	16%
Burger	11%
Side dish	11%
Salty snacks	11%

Afternoon	frequency
Salty snacks	16%
Side dish	14%
American / mixed ethnicity food	14%
Desserts / sweet bakery	14%
Sweet snacks	13%

Evening	frequency
American / mixed ethnicity food	20%
Side dish	14%
Burger	11%
Italian food	11%
Salad	10%

Late Night	frequency
Salty snacks	19%
Sweet snacks	17%
Desserts / sweet bakery	16%
Yogurt / parfait / smoothie	15%
Frozen desserts	15%

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DIVERGING PATHS

The decision sequence is clear-cut for most occasions, needs, and triggers: **what** to eat, **where to get** the food, **where to eat** the food, **how to get** the food.

But for AFH Socializing Occasions & Group Needs, the first decision is split between **what** to eat & **where** to eat. The environment/ambiance is just as important as the food itself.

first decision made in decision sequence

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CRAVINGS DERAIL PRE-DECISIONS

53% of consumers changed their mind about what they want to eat because of a **craving** away from home. Consumers eating at home also fall prey to cravings, but less so (32%). Cravings can override even the most effective needs: **cost** and **convenience**.

- 15% had plans with friends or family
- 17% wanted something healthy
- 19% wanted something cheap
- 22% wanted something convenient
  - **but were derailed by a craving eating away from home**

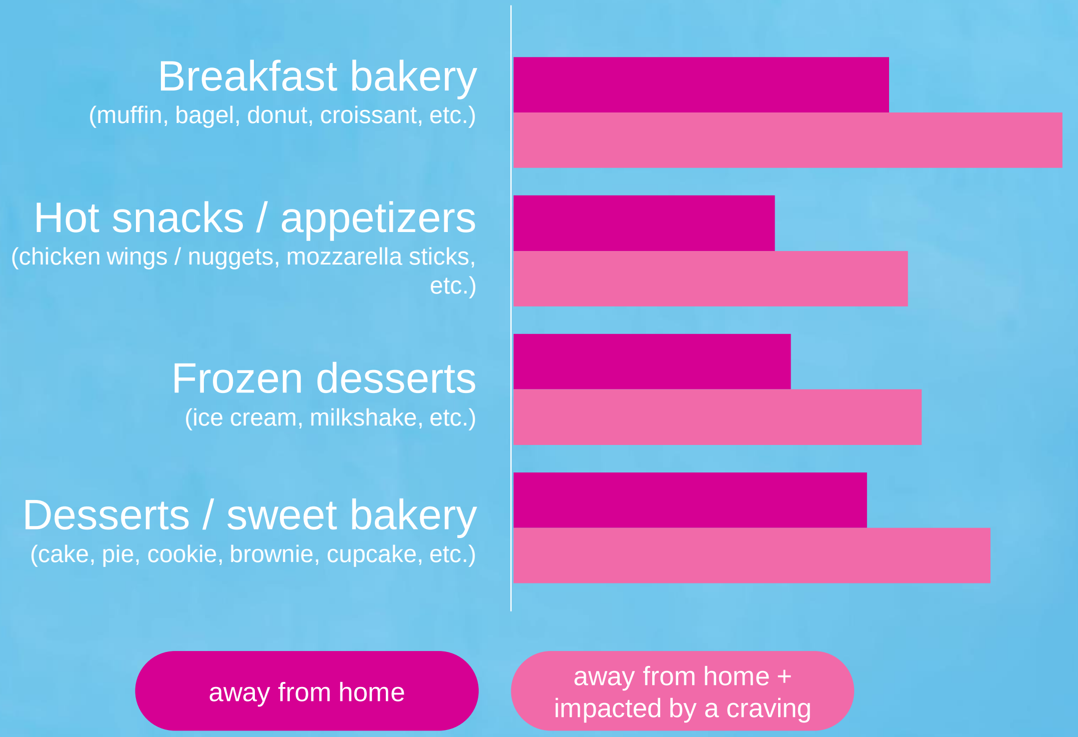
Cravings could happen at any point of the journey

Triggers – Occasions – Needs – The Decision

Cravings

Cravings also affect the consumer's choice of food.

Breakfast carbs, apps, and sweet treats all push consumers away from pre-determined food choices.



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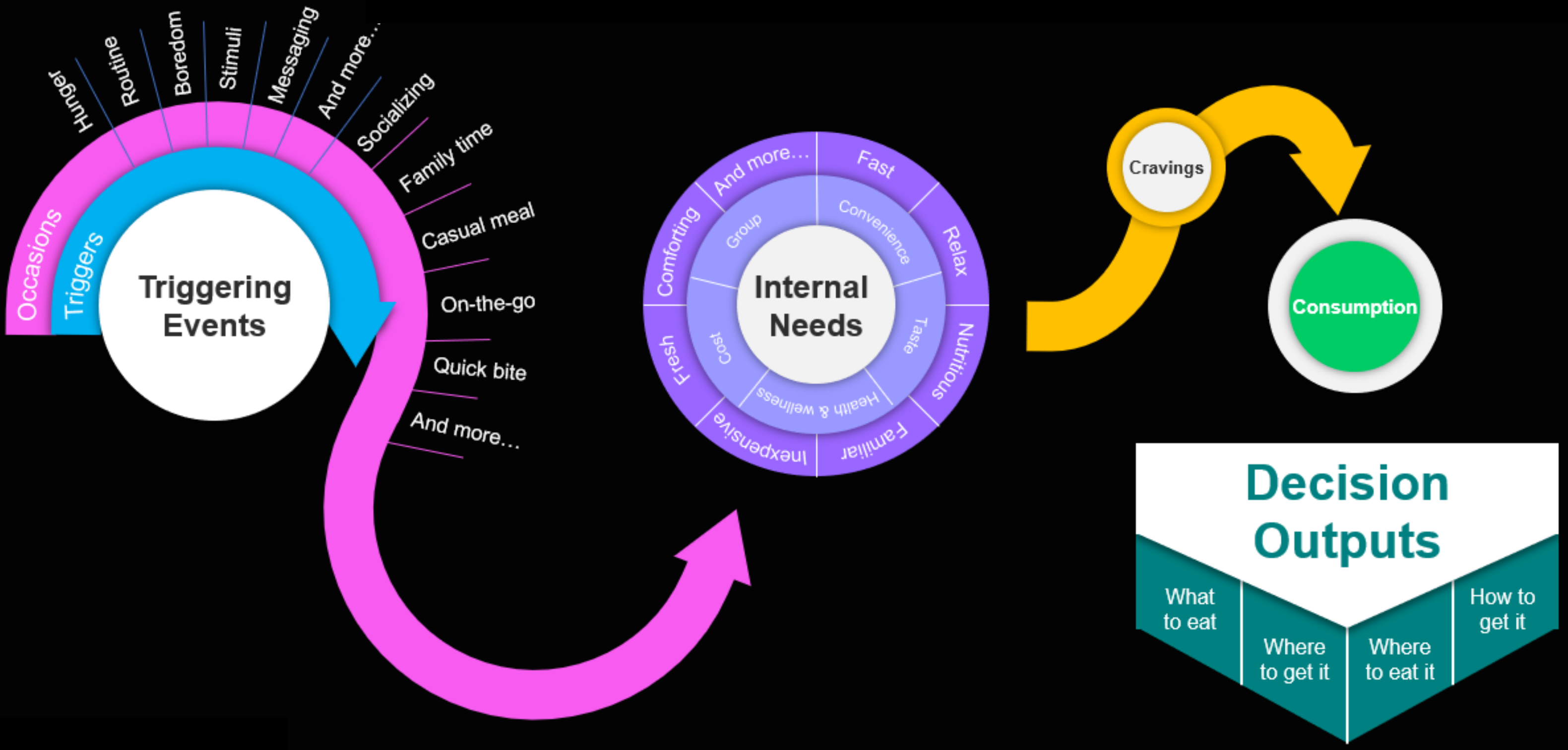
dive in and explore the CONSUMER FOOD JOURNEY℠

further online in January 2020 at ifmaworld.com



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