

BUSINESS SITUATION:

ConAgra Foods makes many leading brands, including Healthy Choice, Chef Boyardee, Egg Beaters, Hebrew National, Hunt's, Orville Redenbacher's, PAM, and Banquet, among others. Their consumer brands are found in 97% of U.S. households and 24 are ranked either first or second in their category.

ConAgra Foods has grown through the years by merging many successful and innovative companies and the resulting mix of cultures, go-to-market strategies and breadth of brands made ConAgra Foods a powerhouse in grocery. But without a cohesive proposition across the brands, it was difficult to successfully leverage their scale.

The challenge: deliver on shopper's needs strategically and effectively while providing retailers with a new level of marketing sophistication and collaboration – to help differentiate and drive consumer loyalty.

In 2008, ConAgra reorganized its approach. The goal was to differentiate ConAgra Foods and its brands with retailers, to create more opportunities through scale and shopper relevance, and to improve the reach and effectiveness of their marketing dollars. The result was the formation of ConAgra's Integrated Customer Marketing organization, comprised of four shopper-facing functions: Category Leadership, In-Store Marketing, Shopper Marketing, and Shopper Insights – one integrated team who collaborate to deliver and execute sustainable, profitable growth ideas by deeply understanding shopper behaviors and attitudes and converting these insights into action.

As they began working within the new structure and collaborating with the sales force and the retailer's shopper programming, one important question kept coming up: *Why are our brands important for this time of year?*

RESEARCH SUMMARY:

Issues/Questions:

Quantitative and behavioral data already existed for each of ConAgra's individual brands showing how consumer demand changed throughout the year. What was needed was a way to understand and leverage those seasonal behavior changes across multiple brands that made sense from the shopper's perspective. First, they had to better understand the shopper's perspective: What were the attitudes, needs and desires that caused her to make behavior changes throughout the year?

Retailers have been doing this for decades in the form of drive periods. They create events around functional seasonal occasions. What ConAgra wanted to offer was the emotional motivators behind these drive periods.

Across the portfolio of brands, the target shopper most ConAgra products had in common was moms. With 68% of moms saying that marketers don't understand them, the true research question became: *How do moms' needs change throughout the year, and what products will best meet their needs?*

In addition, the ICM team had 3 objectives for these insights:

- Help ConAgra Foods be a more valuable, differentiated partner to their retail customers
- Create a more relevant value proposition to shoppers across ConAgra's broad portfolio
- Provide proprietary insights that can easily be customized for any event at any retailer

Methodology:

ConAgra enlisted Fusion Marketing Power, Inc. to help conduct and analyze the research. To find the emotional drivers behind moms' seasonal shopping behaviors, the obvious choice was to talk to moms directly. The group looked at a broad range of moms that would encapsulate the brands' core consumers and the retailers' core shoppers. The resulting survey group represented a diverse array of geographic, socioeconomic and psychographic profiles.

The researchers used multiple techniques over multiple rounds to get to the heart of how the moms' mindset changed throughout the year, how the time of year affected their needs and desires, and how they went about meeting those needs.

Stage One: One-on-one Interviews

ConAgra's foundational learning started with a series of one-on-one intimate interviews. As pre-work, Fusion gave these moms a blank calendar and asked them to divide it into 'their' seasons rather than the traditional Fall, Winter, Spring and Summer seasons that everyone is more familiar with. They were told to define a season as a 'chunk of time when household rituals and patterns shift' including shopping behavior, foods they buy, pantry and refrigerator and freezer landscapes. They were also given the projective tools and stimuli so they could define the markers that define each of 'their' seasons to life. Fusion then conducted 2-hour intensive interviews with 36 moms around the country to listen to their stories and decipher patterns that ConAgra could build programs and strategies around. Their stories are captured in a video montage.

Stage Two: Focus Groups

Fusion conducted 14 focus groups, again around the country, with moms across a myriad of socioeconomic and demographic classifications including working moms and full-time homemakers. They validated the original Seasons work and added another layer of understanding around key platforms within each Season to assess seasonal impact and to identify the salient functional and emotional drivers for each platform. A robust pre-work assignment asked the respondents to record and 'bring to life' each particular platform. They were again provided with projective tools and stimuli to 'bring to life' each platform and the ebbs and flows of that platform season to season. They conducted 2.5-hour focus groups and breakout sessions to download this information and build collectively the possibilities and consumer wishes to make these platforms more in line with their needs.

Ongoing Localized Studies

ConAgra has also performed ad hoc research against many of their retail customers' shopper segments. This work has followed a variety of qualitative methodologies, from online surveying to ethnographies. This retailer specific work is used to enhance and expand upon the foundational research on a continual basis.

Findings:

The women identified six seasons in their mental calendar: Post-Holiday, Spring, Summer, Back to School, October Fling, and Holiday. These seasons each have unique emotional and practical needs for their families. And each season changes the way the family relates to food. These seasons are the same around the country. The start and end time may adjust slightly due to weather differences, yet the same six seasons emerge.

Seasons are fairly consistent regardless of kids' ages, though emotions may vary slightly. For example, preschool moms are relieved during the Back to School season because they have some quiet mom time again, whereas elementary moms are stressed because of backpack overload. Both define 'Back to School' as a season, even though there is a slight difference in their needs and desires within the seasons.

The social network and people she is providing for shifts season to season based on the activities that define her season. For example, Holiday is focused on her extended family, while Post-Holiday is around her immediate family. And the food needs and cooking behaviors change in each season—stove top vs. crock-pot vs. oven vs. grill.

The Shopper Seasons:

The emotional resonance the moms applied to each of the seasons combined with their changing needs is what makes these insights so powerful. And it sets a clear roadmap for determining which categories meet their needs and how a brand will be most relevant to her life. Here is a brief overview of the Shopper Seasons:

POST HOLIDAY (January/February)

Core essence of the Season: Nesting

Cocooning, Routines Resume, Fewer Temptations, Low-Key Indoor Fun

The holidays are over, and moms are decompressing after all the stress. They look forward to getting back into the routine, eating out less, and laying low. It's time for wholesome comfort food, movie & game nights, and overall less indulgent living.

SPRING (March/April/May)

Core essence of the Season: Rebirth

High Energy, Senses Awaken, Friends Reconnect, Activities Broaden

The sun is coming out, and the family schedule is getting more varied. The time that isn't set aside for kids' after-school activities is full of fun time. Everybody wants to get outside a little more, and moms are looking for foods that won't slow them down. Light, fresh, portable foods fill her pantry and fridge.

SUMMER (June, July, mid-August)

Core essence of the Season: Liberated

Freedom, Looser Schedules, Outdoor Activity, No Rules, Fun

The kids are out of school now, and everything feels free and casual. The neighborhood really feels like a neighborhood, and informal parties happen more often in the summer. There's time to experiment a little with mealtime, but there's less pressure to "perform." Sometimes, there's nothing wrong with just throwing some hamburgers on the grill, after all.

BACK TO SCHOOL (mid-August, September)

Core essence of the Season: Wanting Her Family "Advantaged"

Overwhelmed, Balancing Schedules and Tasks, New Routines

The routine comes back, and it hits hard. Everything becomes more strictly regimented from meals to schedules to budgets. It's a time of no compromises, when moms need to be moms. Moms are building the routines that will last all year, and they want to make sure they give their family the best chance to succeed. They need to provide a wholesome meal and make sure that the kids eat their veggies.

OCTOBER FLING (October)

Core essence of the Season: Spice

Steady Routines, Family Time, Creativity, Eye on the Holidays

After the frantic Back to School, this is a subtle, transitional period. A chance for everyone to catch their breath before the rush of the holidays. The routine is established, and though the days are busy, the consistency makes them manageable. Sweets start to find their way back into the diet, and moms are turning the crock-pot back on. Snacking becomes a big part of family game & movie nights.

HOLIDAY (November/December)

Core essence of the Season: "Obligations" in a Good Way

Joyful Traditions, Extravagant Parties

This is a very busy time of year, but in a good way. The expectations and traditions that come along with the holidays make "pulling it off" the kind of challenge moms enjoy. There's little room for experimentation, as everybody has their favorites that they expect. Moms need to balance the indulgence of the holiday events with the convenience that this busy time of year demands.

CAMPAIGN EXAMPLES:

With this deeper understanding of what drives Moms' shopping decisions, ConAgra needed to develop a process for bringing them to life in their marketing programs. Extensive training was provided to the full ICM organization as well as ConAgra's agency of record for shopper marketing, RPM Connect.

RPM was tasked with developing a shopper strategy brief that would allow the Shopper Insights personnel to combine the brands' consumer insights, the retailer shopper segmentations and the Shopper Seasons research into the most succinct and compelling insights to activate against in each event. The resulting brief asks for the attitudinal and behavioral background for the target during a specific time of year for a specific retailer and builds to a key insight that presents the opportunity for the retailer and ConAgra to deliver against the shopper need.

The majority of ConAgra shopper programming has a foundation in the Shopper Seasons work. Here are some key examples of how it has come to life in Shopper Marketing programming:

POST-HOLIDAY: Kroger “Little Extras” and ShopRite “Mix Up a Smile” – Both programs allow us to focus on the cozy moments mom cherishes this time of year. “Little Extras” features ConAgra brands in occasions unique to the Season while also delivering on the value she desires this time of year. “Mix up a Smile” is a simple way to show mom how to indulge the cocooning mentality with ConAgra’s brands.

SUMMER: SuperValu “Anytime Entertaining” and Target “berry fun. berry easy.” – With the focus on being prepared for the informal parties of summer, “Anytime Entertaining” helps position ConAgra’s brands as the easy way to “plan for the unplanned”. “berry fun. berry easy.” helps inspire mom to add that extra bit of fun to the evening without extra effort.

BACK to SCHOOL: Walmart “Prepare for Success” and SuperValu “Back to Their Best” – Both programs deliver on her need to save time and money while also meeting her desire to have her family advantaged.

OCTOBER FLING: Publix “Creative Comfort Food” and Walmart “Feed the Fun” – “Creative Comfort Food” leverages mom’s change in the cooking techniques and menu, providing extra relevance to the brands. “Feed the Fun” takes her transitional mindset and anticipation for the holiday season and inspires the fun of gathering around food.

HOLIDAY: Food Lion “Time to Celebrate” and SuperValu “Holiday Value” – “Time to Celebrate” has two ways to provide value for mom...brands that meet the high expectations for the holiday events, and brands that are convenient for providing for her family during the busy season. “Holiday Value” provides easy, affordable everyday meals with the indulgent flavors she wants in this Season.

RESULTS:

The results from programs that leverage the Shopper Seasons insights have been phenomenal. By comparison, Shopper Marketing programs that use the seasonal insights have an aggregate ROI 30% higher than all other programs. Marketing with the Shopper Seasons has also been shown to increase the efficiency of trade spending.

Some of the greatest benefits from the research have less quantifiable results. Shopper Seasons has been invaluable in improving the relationship ConAgra has with their retail customers. Shopper Seasons has allowed ConAgra to get a seat at the table for collaborative planning and opened up deeper sharing of insights and strategies with retailers’ merchant, marketing and research groups. And it has proven to be a great tiebreaker in discussions about securing incremental display throughout the year. Most importantly, it is part of the approach that makes ConAgra a valuable vendor partner to their retailers.

The shopper-focused nature of the research has been important for allowing the Shopper Insights personnel more focus and time for developing customized research because a strong base understanding of the target’s mindset already exists. And because the information is shared knowledge across the ICM team and agency partners, it is much easier for the group to come to a consensus about the opportunity and focus on developing more effective marketing communications and programs.

By discovering how shoppers’ needs and desires change throughout the year, ConAgra has enhanced the way they communicate their brands’ relevance to their consumers.