

The Clear Truth About Salad

Giving leafy prepared salad shoppers the right inspiration is key to achieving £1 billion sales.



The last 10 years in the leafy prepared salad category have seen the emergence of more choice in bags and bowls. Initially this brought new shoppers into the category, driven by the inherent health and convenience the products

deliver. However, this choice has made the fixture increasingly difficult to shop.

In recent years, shopper numbers have plateaued. Increasingly it has been purchase frequency that has driven salad category growth ahead of total produce. Even though shoppers face a challenging economic climate, 71% of shoppers³ claim the economic downturn has had no impact on their buying of leafy prepared salad. This, coupled with unpredictable British weather levelling seasonal

demand, so consumers are more comfortable with salad as an alternative to vegetables all year round, means there are opportunities for increasing sales.

With 10% of category value share and the broadest coverage of the UK market, Florette is uniquely positioned to develop a market level understanding of the leafy prepared salad shopper and through this deliver the best shopping experience to harness the frequency opportunity.

The Category and it's Shoppers

Annually the leafy prepared salad category is worth £549m¹ and it is growing +6%¹ by value. The category's penetration of 72%² hasn't changed significantly for five years and trends would suggest that future growth will come primarily from improving shopper frequency.

Average purchase frequency in leafy prepared salad is currently 14.1² - the equivalent of little more than once a month per shopper. Within that there is a vast discrepancy. Some shoppers buy every single week and many

shoppers buy only a few times a year. Traditional segmentation methods like demographics do little to separate the different types of shopper within leafy prepared salad as affluence, age and household size often give little indication as to what shoppers actually buy. Therefore, in order to bring a richer understanding to the category, Florette has commissioned new research with Kantar Worldpanel to group shoppers according to their shopping behavior and their attitude to salad.

Overwhelmingly, the research has shown that the key opportunity to drive category sales forwards lies in giving shoppers greater enjoyment from the shopping experience through to consumption.

Only 59% of leafy prepared salad shoppers² claim to enjoy eating salad and many find the shopping experience confusing. By inspiring shoppers with an easier and more informative shop the category can increase frequency to the required level to reach £1 billion category sales.

The Grocer Factfile

The Shopper Statistics:

Penetration = 72%

This hasn't changed significantly in five years

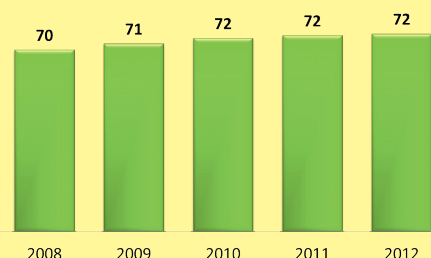
Frequency = 14.1

Getting shoppers to buy once a fortnight will deliver a £1 billion category sales

Trip volume = 1.18

Most shoppers buy one unit per visit to get the best freshness

52 week penetration %



To inspire shoppers to buy leafy prepared salad more often you need to know how they shop and what they like, which is where Florette's shopper segmentation really helps.

Knowing your shopper and what they think about salad is the first step towards being able to give them what they want. Florette's research has shown that each type of shopper likes different things: some shoppers want to try new ideas whilst others want help finding a product they know they will like.

Leafy prepared salad shoppers are defined by their attitudes to enjoyment, convenience, health and waste:



A promotional supplement from Florette

When approaching the purchase decision for salad there are five questions a shopper answers.



1 What (and when and for whom) do I need this for?

2 What do I / don't I like?

3 How fresh does this salad look?

4 Is this product good value for money?

5 Which pack has the longest life on shelf?

On average shoppers spend 44 seconds³ at the leafy prepared salad fixture but most of that time is wasted trying to find the right product and looking for the freshest pack.

Shopper type:	How to recognise them?	The opportunity:
Addicts and Adorers - a third of shoppers are 'Addicts' and 'Adorers' who account for 57% of the category spend	Very image and health conscious. They like brands and have adventurous tastes – salad is the heart of many meals	Attracting Addicts to your store and stocking the products they like is the surest way to maximising sales
Selectors - are the largest group of shoppers and although they really enjoy salad, they don't buy leafy prepared salad often	Selectors are very 'foodie' and like to scratch cook. They have less time pressure than others and buy more wholehead than prepared salad	Inspiring Selectors to buy leafy prepared salad once more a year would generate £11m
Accepters - although they buy it a lot, Accepters don't really enjoy salad - they eat it because they want a quick and healthy meal	Driven by convenience foods – they eat takeaways because they're often short of time. They eat salad as a quick way of getting 'green' onto their plate	Give Accepters quick meal ideas by merchandising all the elements together and highlight the nutritional content of the whole meal
Avoiders – the most receptive to promotions and can drift in and out of the category. Avoiders account for less than 10% of category spend	Price conscious shoppers who buy more wholehead than prepared because they are put off by waste and find the fixture difficult to navigate	Help Avoiders enjoy salads by highlighting additions and simple meal ideas that will fit into a tight budget.
Rejecters – 28% of all shoppers do not buy leafy prepared salad and a quarter of these do not buy any salad at all. Rejecters are lighter Produce shoppers generally.	Generally older and less affluent, rejecters are driven by convenience and are more likely to work to a strict budget for groceries.	Rejecters offer a limited opportunity for leafy prepared salad but could be attracted by simple, convenient meal accompaniments, provided they are inexpensive.

Help shoppers enjoy shopping

Use leaf imagery to signpost the fixture so shoppers can navigate it simply.

Leafy salad is only part of a meal, so when shopping consumers are thinking about what else they can put in their salad. Interestingly, over 70% of shoppers³ haven't decided which product they want to buy until they get to the fixture. So to make it easy for them, layout the fixture according to how the shopper shops. Order the shelf in the way the shoppers view it - from simple crunchy leaves and single leaf through to more complete products like bags with dressings and bowls.



Use POS to reinforce the fixture segmentation and give shoppers ideas on how to make enjoyable salad.

- **Crunchy** salad is typically sweeter and contains ingredients that offer bite and crunch including iceberg, cabbage-based products, sweet & crunchy mixes and anything that includes carrot, pepper or sweetcorn.
- **Single leaf** salad e.g. rocket, watercress, spinach, lambs lettuce, is also a simple category in shoppers' eyes.
- **Mixed leaf** salad is the largest part of the category and is divided between mild mixes and strong mixes.
- **Bags with dressing** offers shoppers a more complete product with inclusions of dressing and/or other additions.
- **Bowls** serve a different purchase motivation to bags and are therefore merchandised separately to help shoppers find them quickly.

Inspire every shopper to enjoy every salad and your leafy prepared salad sales will double.

- **Know your shoppers:** Understanding your shoppers' attitudes towards salad and how they shop means you can get the right mix of products to encourage more frequent purchasing
- **Freshen up your fixture:** help shoppers get the most out of their time at the fixture with an easy-to-shop layout and inspiring consumption ideas

To find out more about your leafy prepared salad shoppers and how to maximise your sales contact insight@florette.com

Sources:¹ Nielsen: 15th September 2012 | ² Kantar: 2nd September 2012 | ³ Shoppercentric: May 2011