

Do You Know Your Pickle Customer?

Dr. Sean Coary

Saint Joseph's University

Who is Your Customer?



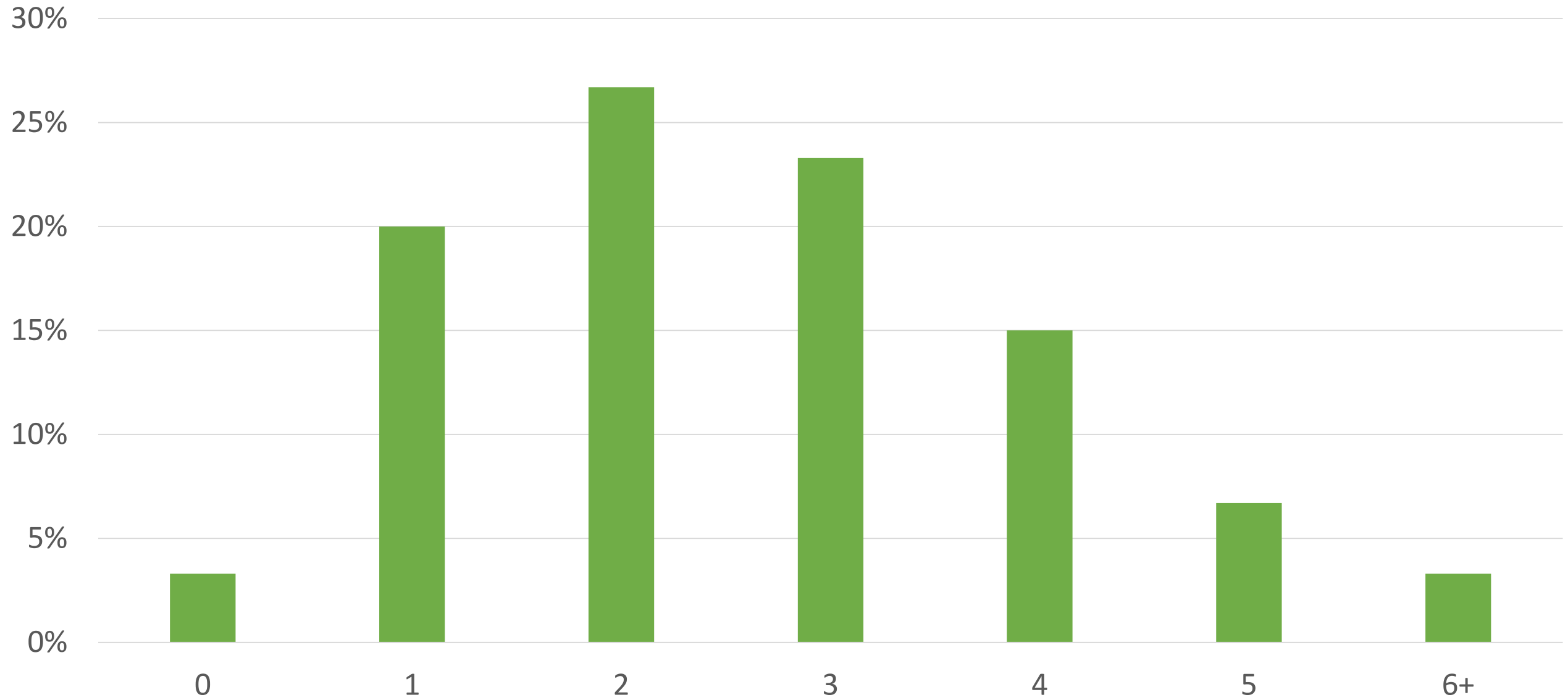
How Well Do You Know Consumers?

How Well Do You Know Your Customer?

- Identical surveys distributed to consumers and pickle industry
- Consumers asked for their opinions and attitudes
 - Online survey panel
 - Over 200 respondents
- Industry asked how they think consumers would respond.

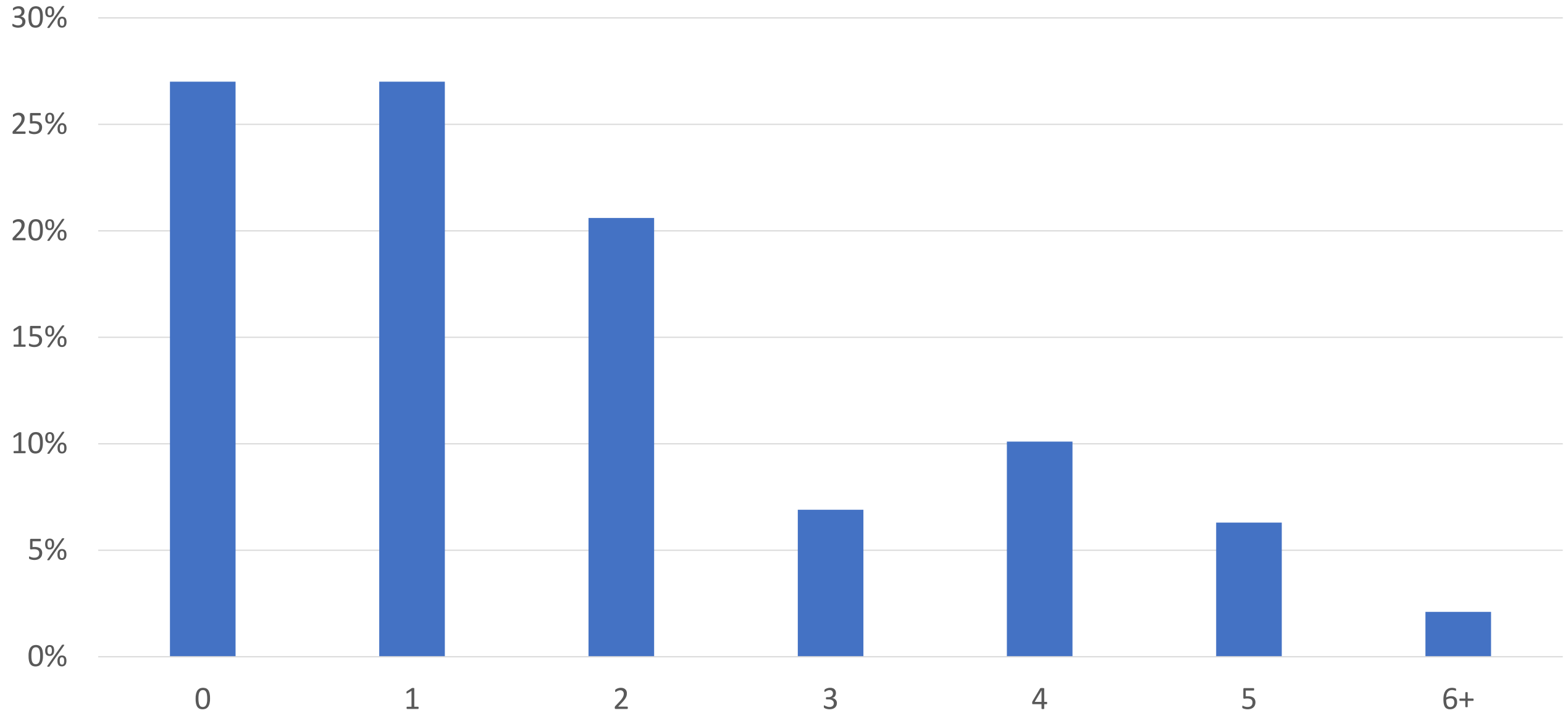
Weekly Pickle Consumption

Industry

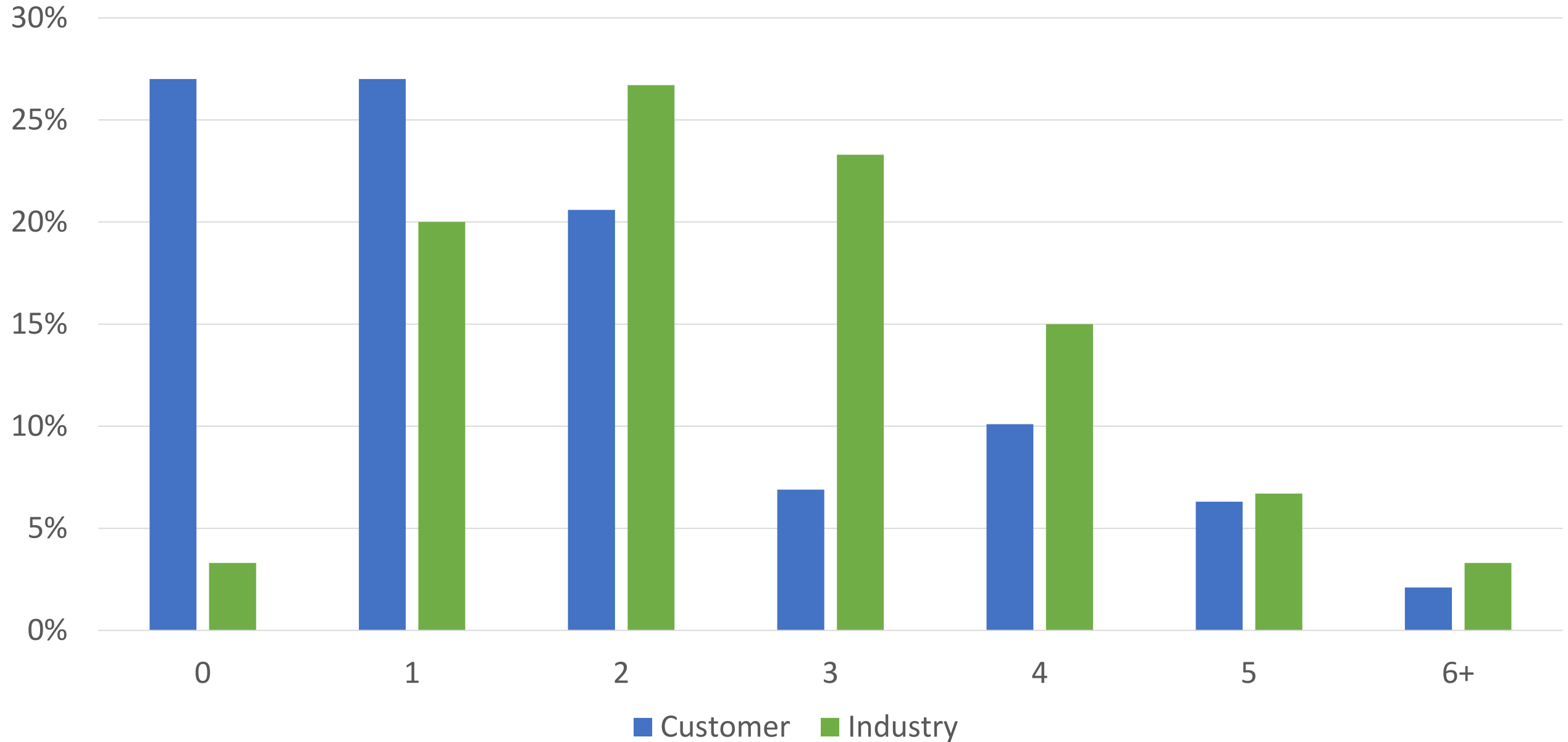


Weekly Pickle Consumption

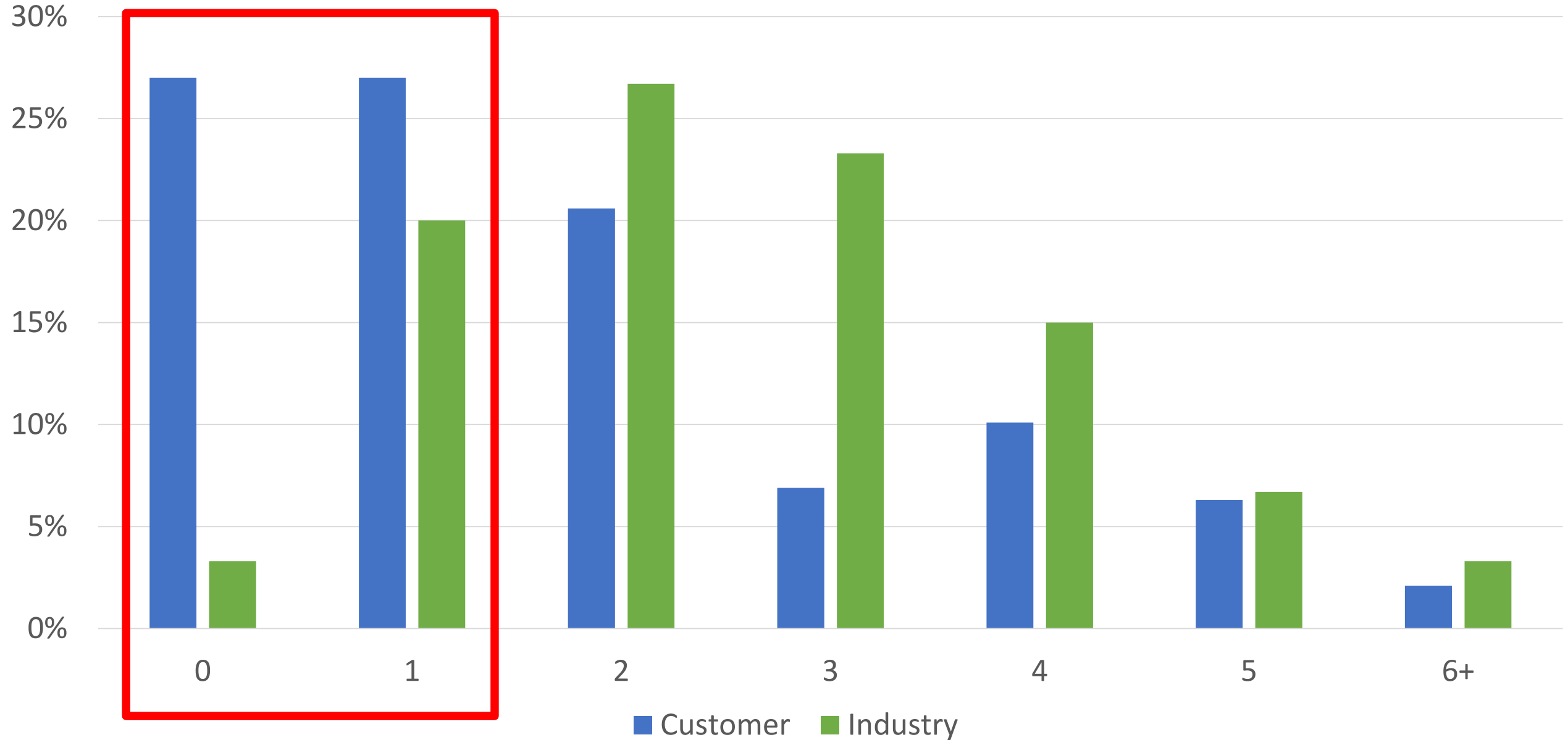
Customer



Weekly Pickle Consumption



Weekly Pickle Consumption

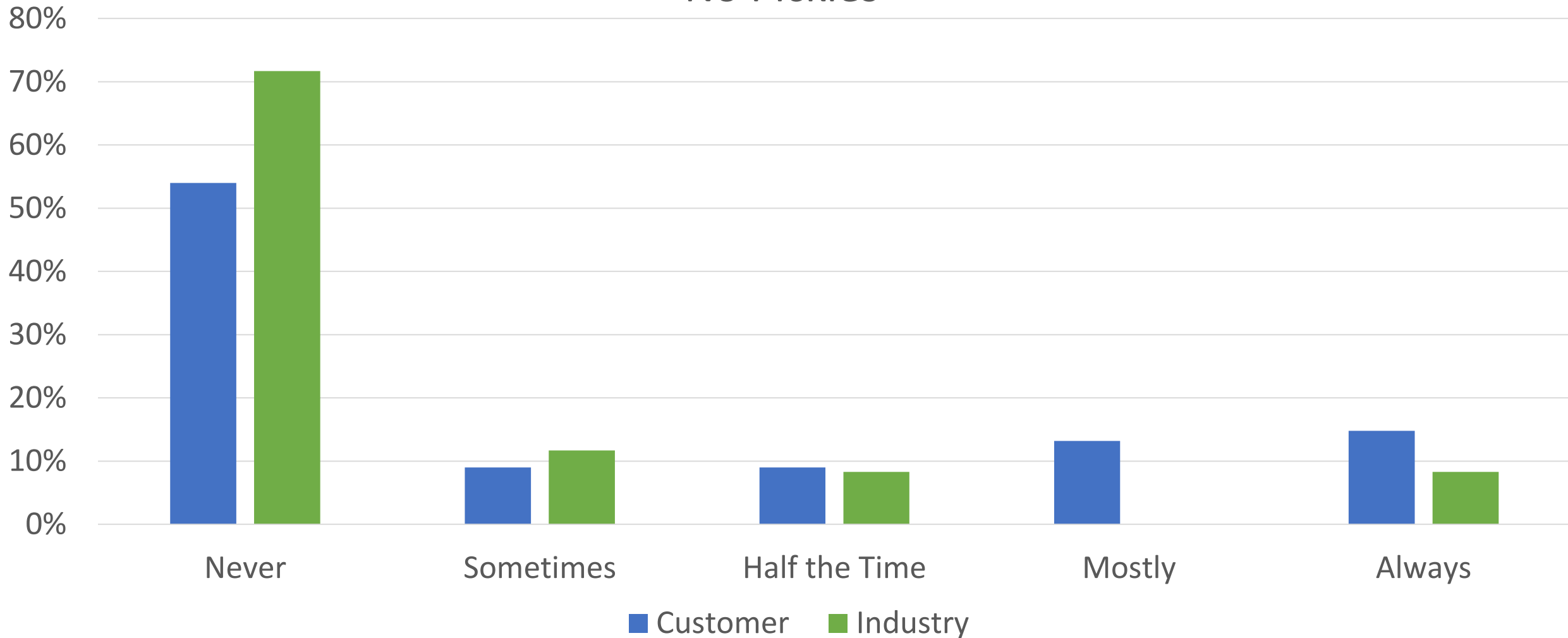


Discussion

- Which consumers do we concentrate on?
- Will we ever be able to move the “0” consumers?
- Why do we severely underestimate the “0” consumers?

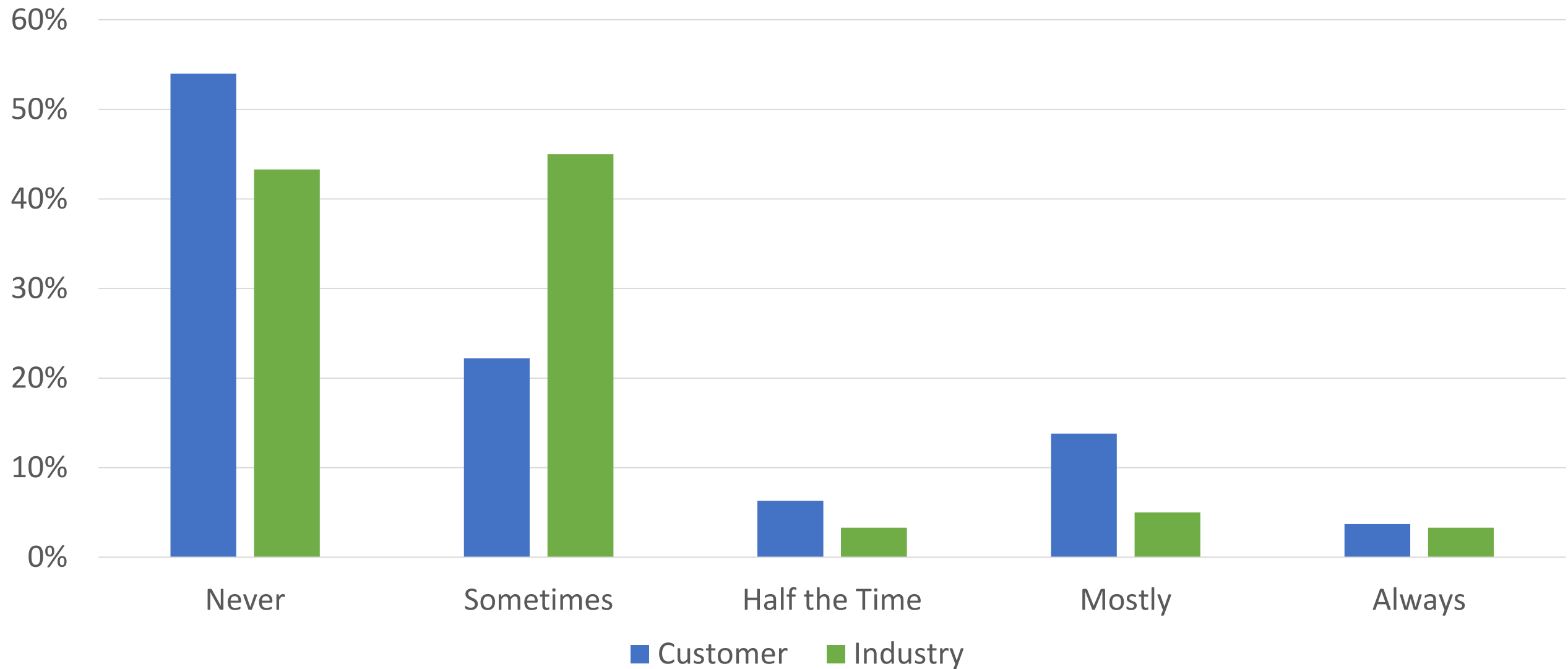
Sandwiches, Hamburgers, etc. Orders

No Pickles



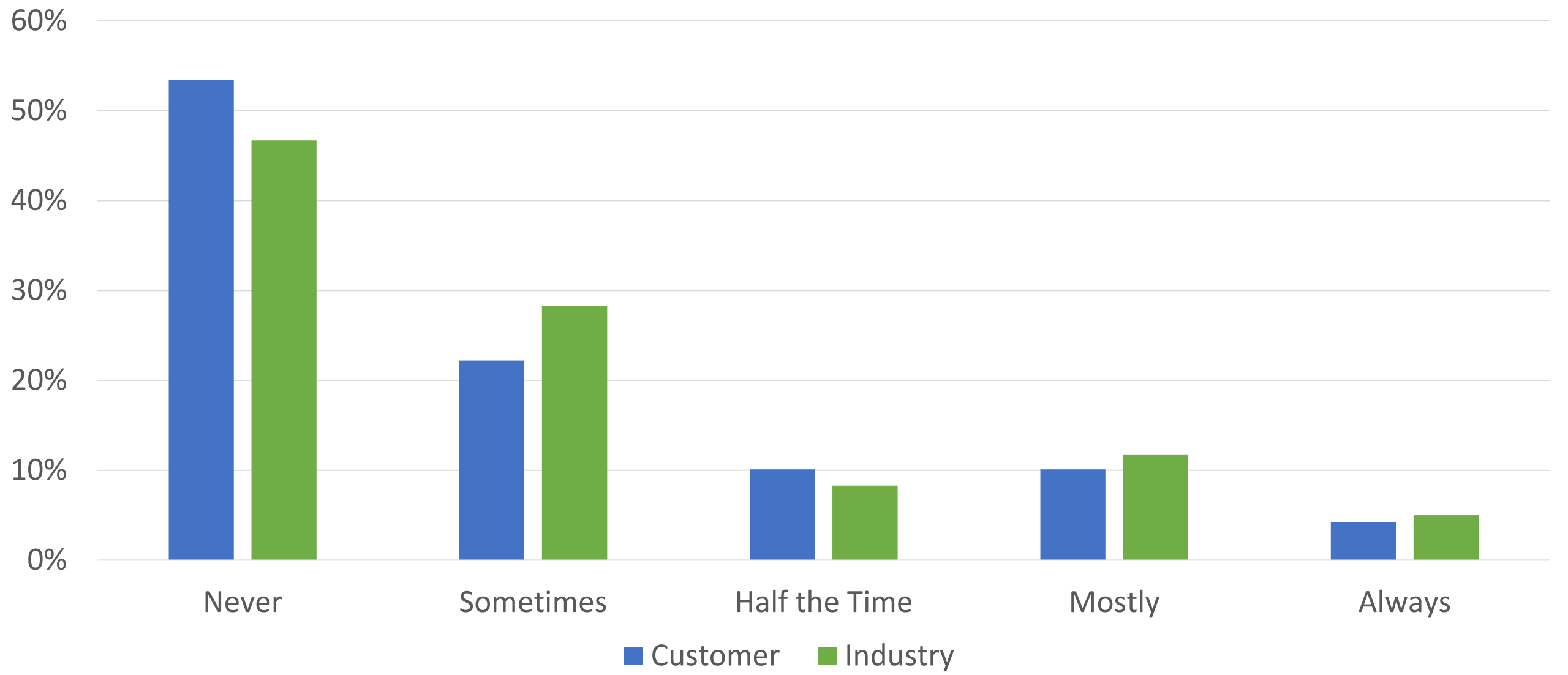
Sandwiches, Hamburgers, etc. Orders

Pickles on the Side



Sandwiches, Hamburgers, etc. Orders

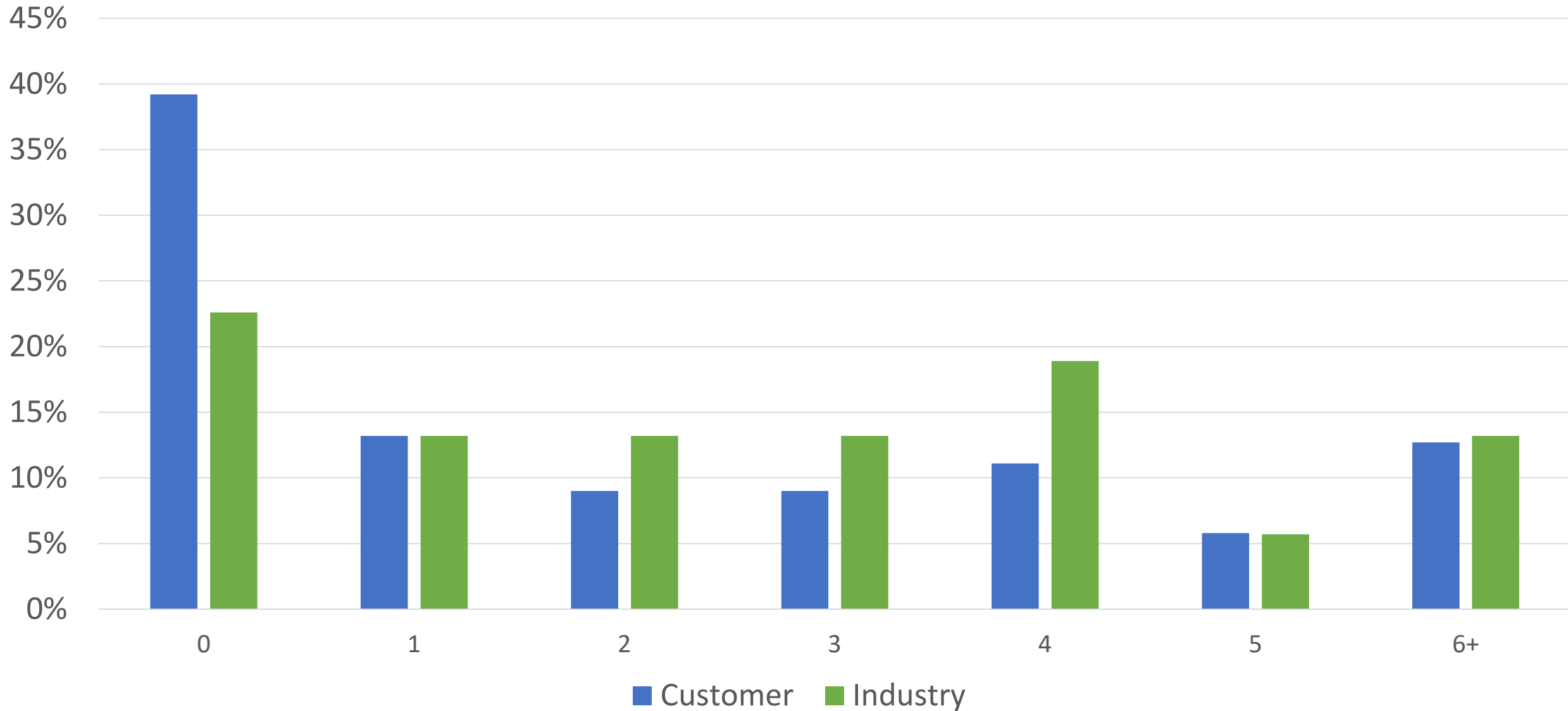
Extra Pickles



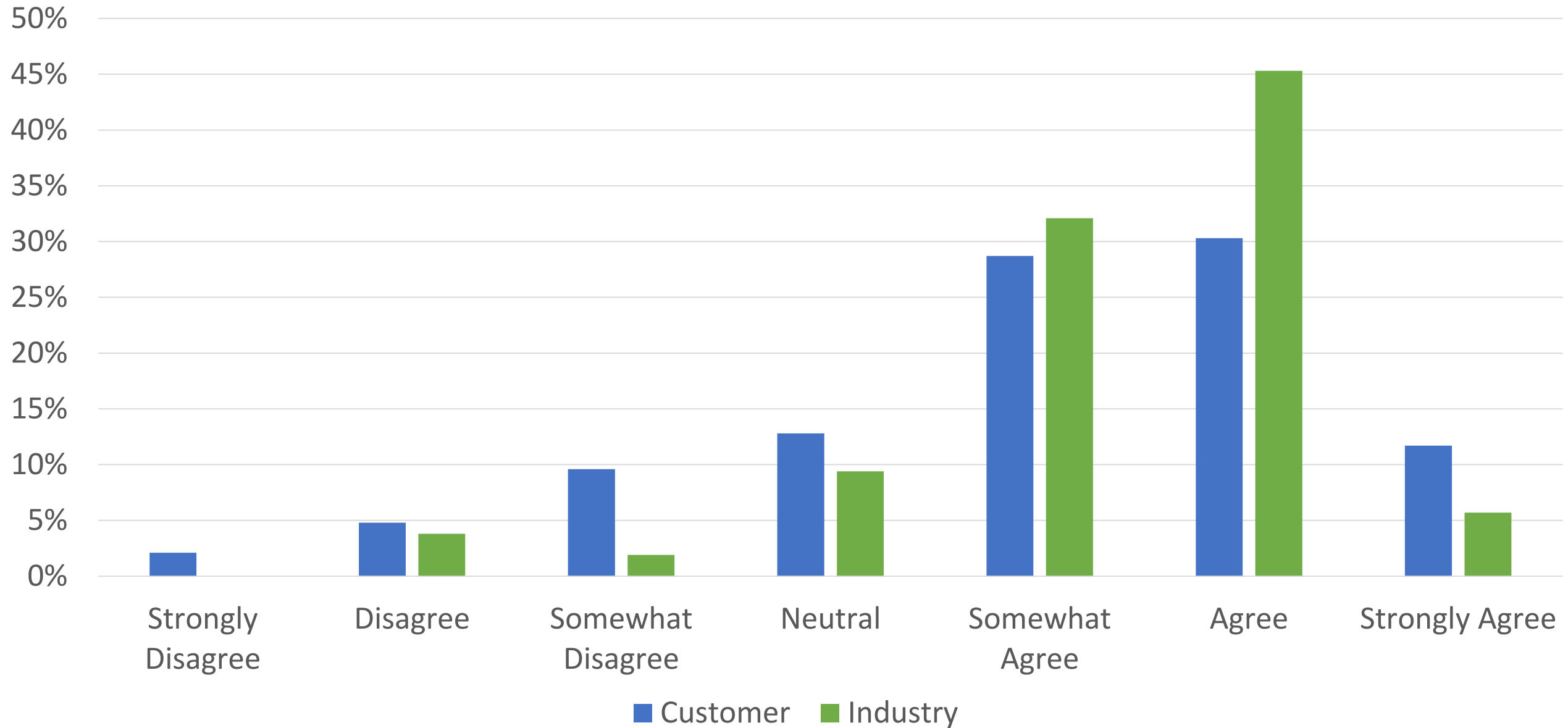
Discussion

- Most consumers do not make adjustments
- Content with the status quo
- Around 20% usually make adjustments

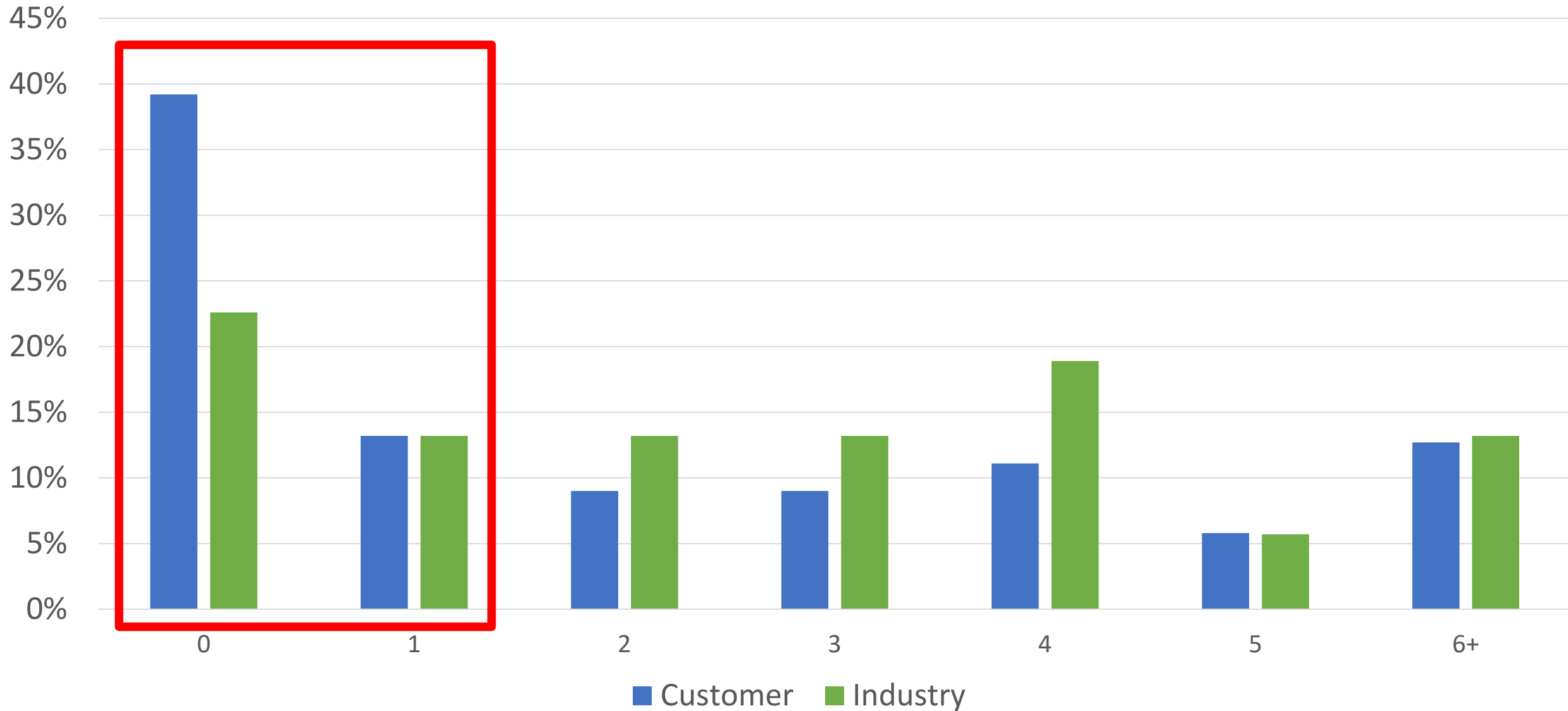
Pickles as a Snack per month



Pickles are a Healthy Snack



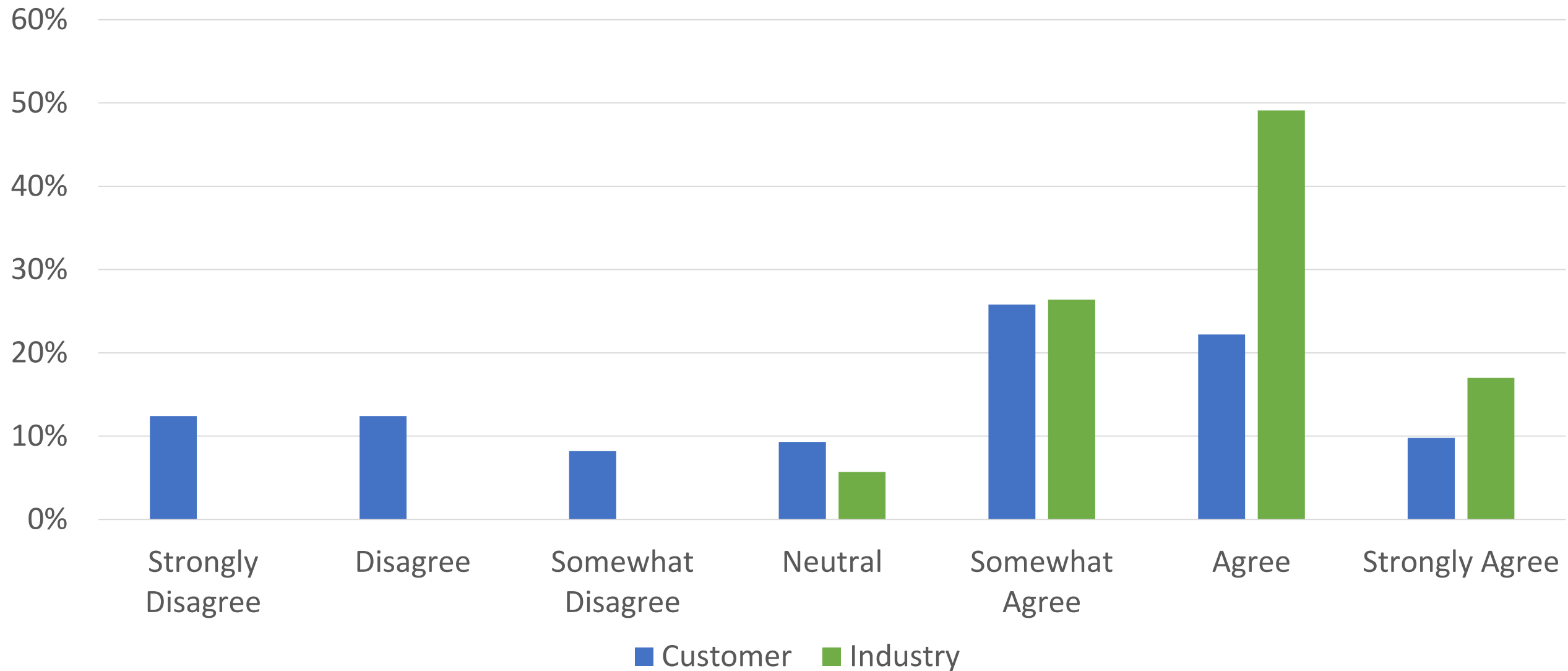
Pickles as a Snack per month



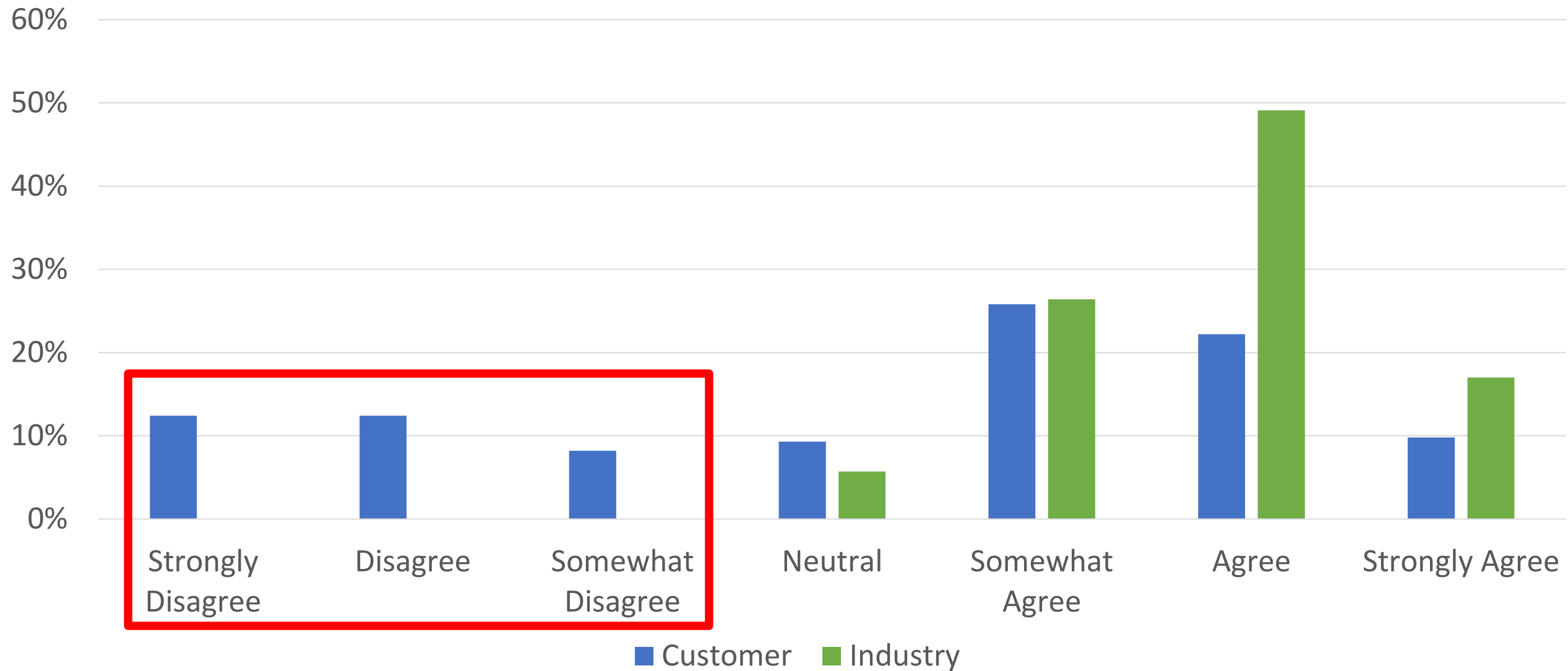
Discussion

- Large segment of consumers never have pickles as a snack
- Includes our 20% “never” pickles but opportunity remains
- Consumers know it’s a good healthy idea.
- How do we encourage snacking?

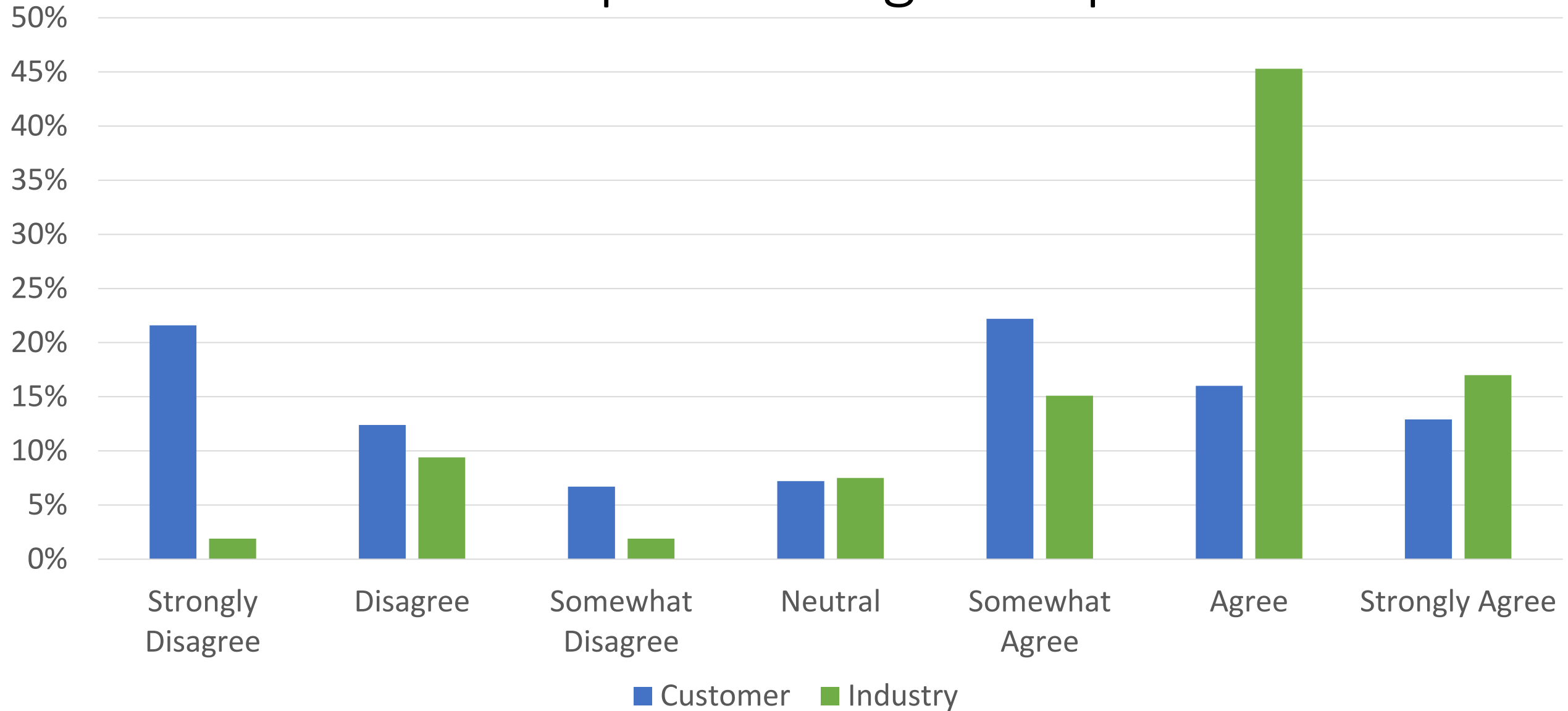
When hosting friends/family, I would serve pickles



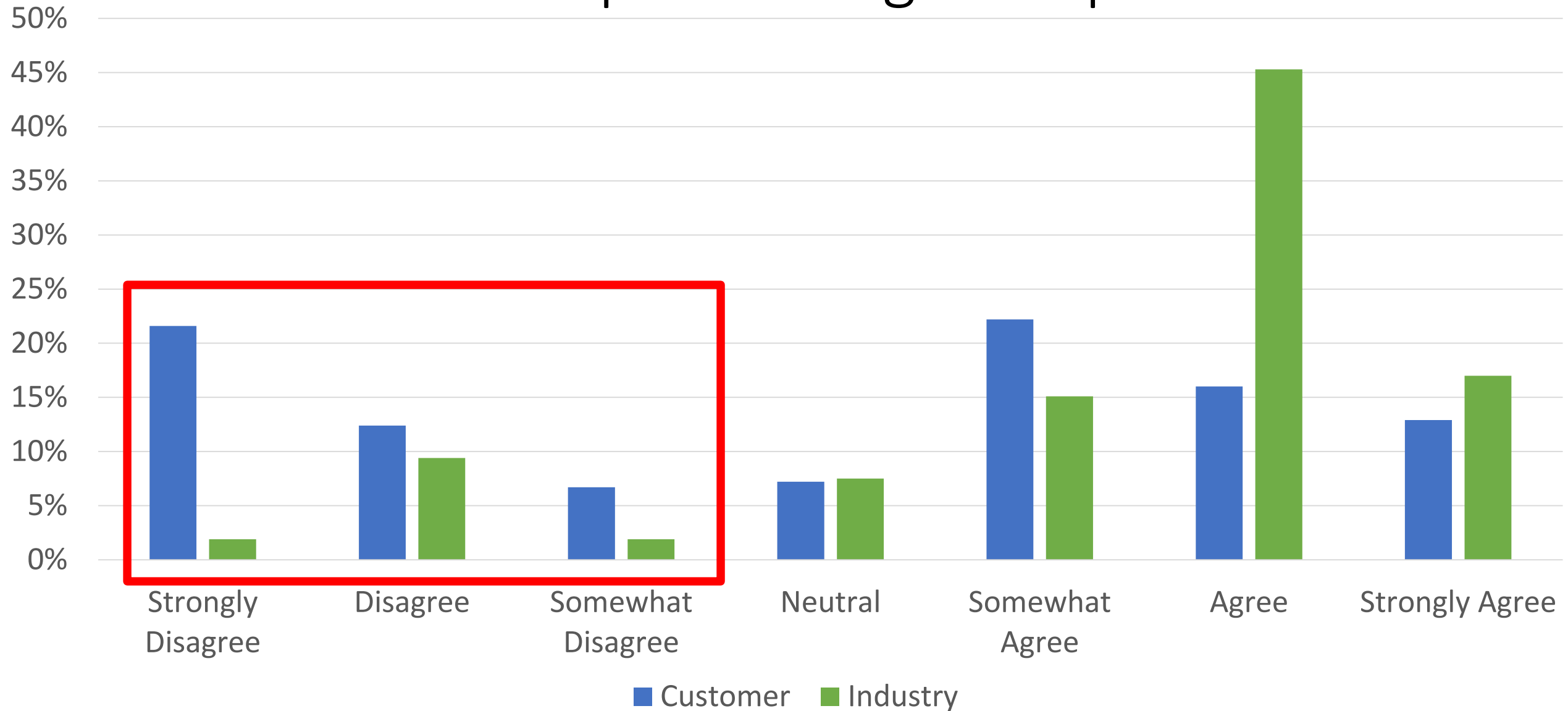
When hosting friends/family, I would serve pickles



I consider purchasing fried pickles



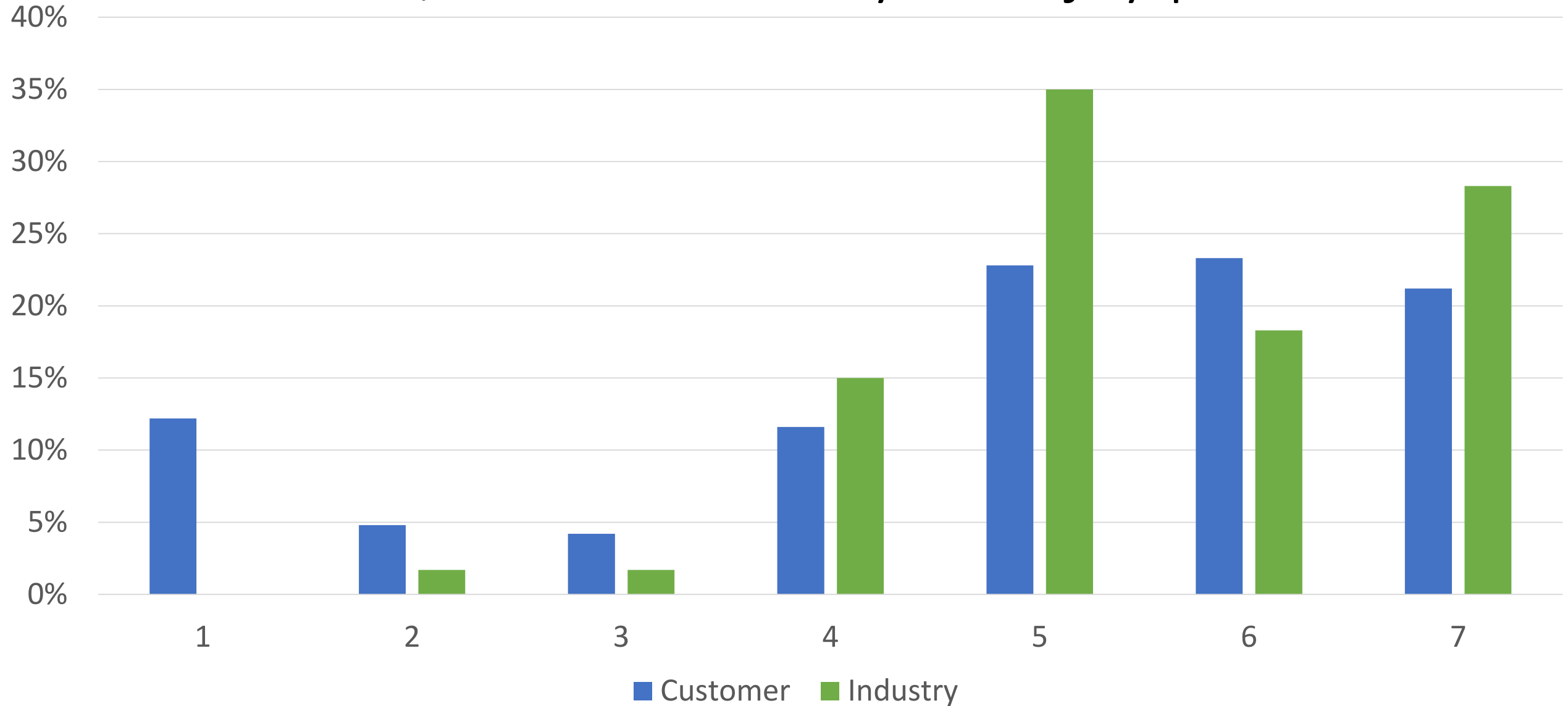
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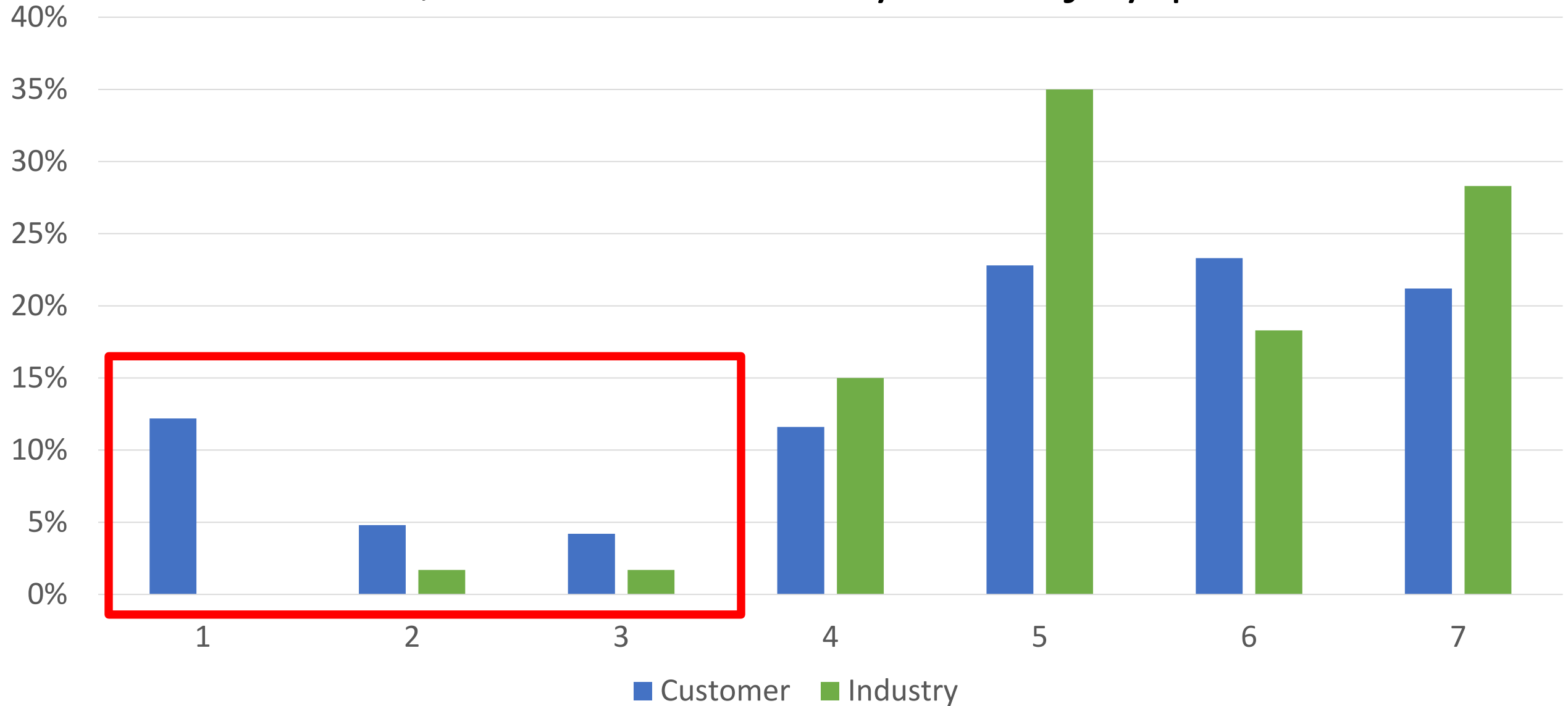
Discussion

- Perception of pickles as a snack or appetizer
- Can pickles challenge the chips & salsa, pretzels and veggie tray?
- Opportunity for specialty products
- Can we move the 40% negative impression of fried pickles?
 - Disconnect from “healthy snack” perception

Overall, how much do you enjoy pickles



Overall, how much do you enjoy pickles



Key Takeaways

- Industry over estimates how frequently consumers consume pickles
- What to do with the “never pickle” people?
- Opportunity to match snacking perceptions with actions
- Increased consumption of pickles away from home