



The Thinking House

BORD BIA INSIGHT CENTRE



The Thinking House
BORD BIA INSIGHT CENTRE

Our Approach

Driving Business Growth through Consumer Understanding



Our Vision

Our vision for the **The Thinking House** is to elevate Ireland as a 21st century contemporary food producing nation that *commercialises* food production in line with genuine *consumer needs*.

The Team



Helen King



Tom Collins



Paula Donoghue



Eoin Kelly



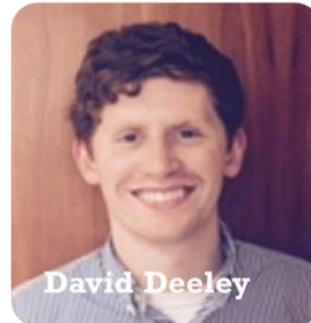
Amy bond



Rory McDonnell



Grace Binchy



David Deeley



Mairead McKeown



Siobhan Collins



Niamh Mac Hale



Zuilmah Wallis



Sorcha
Connaughton



Alan Walsh

**Consumer Insight
Market Insight
Trends
Foresight
Branding
Design
Innovation**





The Thinking House

BORD BIA INSIGHT CENTRE

Category and Consumer Insight

Studies: 2017



Free From



Local Foods



Breakfast



Studies: 2017



Gardening in Ireland



Fresh Produce



Mushrooms in the UK



Studies: 2018



Sports Nutrition



Protein



Gen Z



Bakery



Studies



Middle East

SEA & China

Africa



Shopper Studies - ROI



Fresh & Frozen Pizza



Jams, Nut Butters and Sweet Spreads



Pre-packed Cooked Sliced Meats



Cooked Ready Meals



Fresh Ready Soups





Trends & Foresight



HOT TOPIC 1

The Future of Women



HOT TOPIC 3

Africa's New
Consumer



HOT TOPIC 2

The Uber All
Economy



HOT TOPIC 4

Centennials



Consumer
Lifestyle Trends



[Introduction](#)

[Global forces](#)

[Cultural snapshot](#)

[The Trends](#)

[Contact Us](#)



Welcome to the Consumer Lifestyle Trends Programme

The Consumer Lifestyle Trends identifies the biggest trends shaping people's lives over the next 3-5 years.



Consumer Lifestyle Trends



RoI & GB

PERIscope 2017

Irish and British Consumers and their Food Summary

Research Method

- Face-to-face survey conducted by Ipsos MRBI on behalf of Bord Bia. Interviews in respondents' own home by fully trained interviewers.
- The research was conducted among a representative sample of adults aged 15+ in the Republic of Ireland, and 16+ in Great Britain.
- Quotas were set on sex, age, region and social class to ensure a representative sample.
- Sample sizes:
 - Republic of Ireland (ROI) 1,004
 - Great Britain (GB) 1,078
- Fieldwork was conducted between March and April 2017.
 - *Please note, there may be discrepancies in relation to some of the 'total' figures within this report. This is due to rounding (e.g. "slightly agree" at 45, "strongly agree" at 30, "agree" at 76).*
 - *Where new statements have been added or in instances where question wording and/or format may have changed, missing data is represented by 'n/a'.*

Overview of Content

In n' Out



Green



Convenience



Health



Shopping



Green

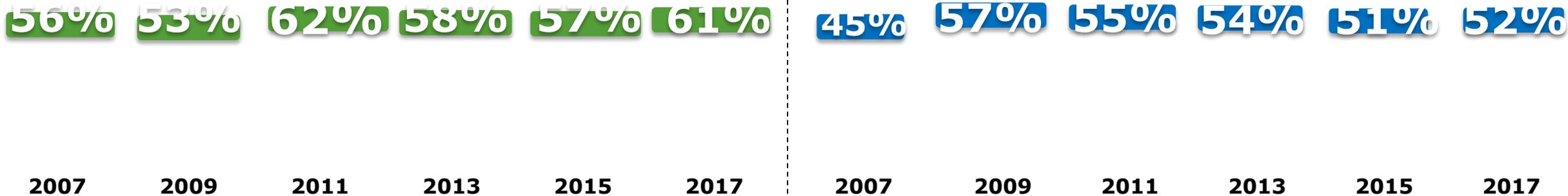


Consumers are more environmentally conscious

% who agree that they are more conscious of environmental issues in their choice of products

ROI

GB



1 in 2 prefer to buy green if possible

% who agree that they prefer to buy from companies that are aware of the impact of environmental issues

ROI

GB

51%

49%

55%

54%

54%

55%

35%

50%

49%

48%

43%

44%

2007

2009

2011

2013

2015

2017

2007

2009

2011

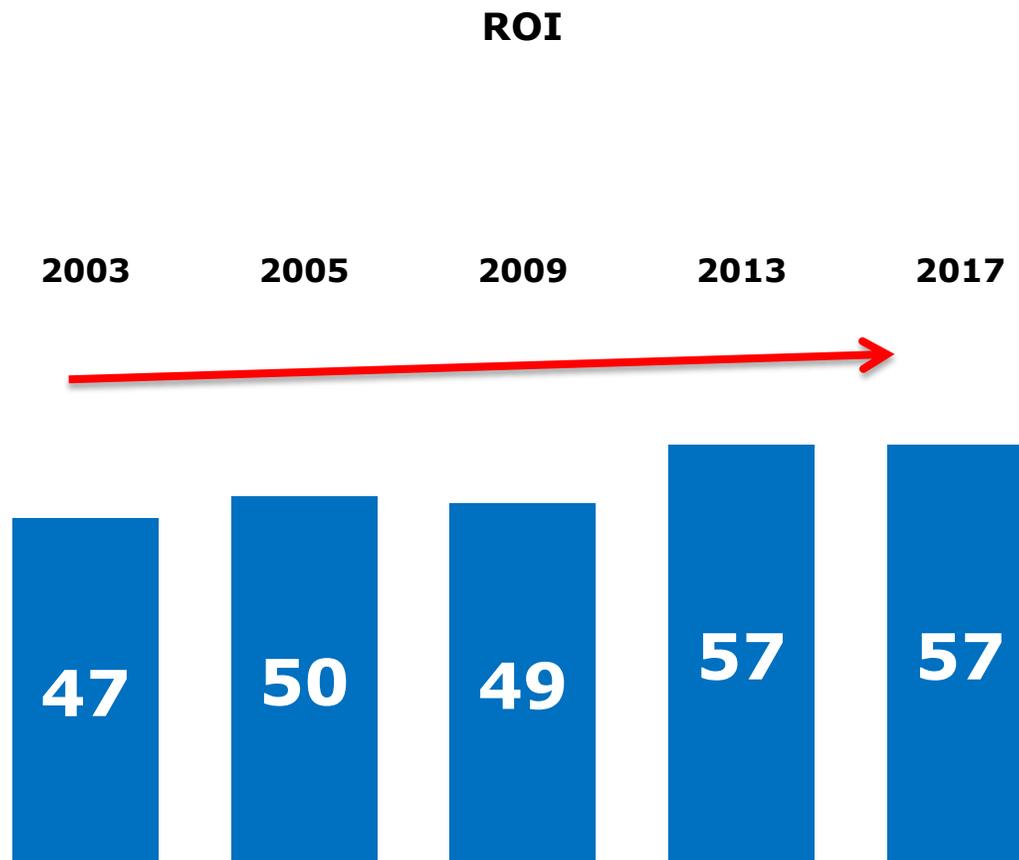
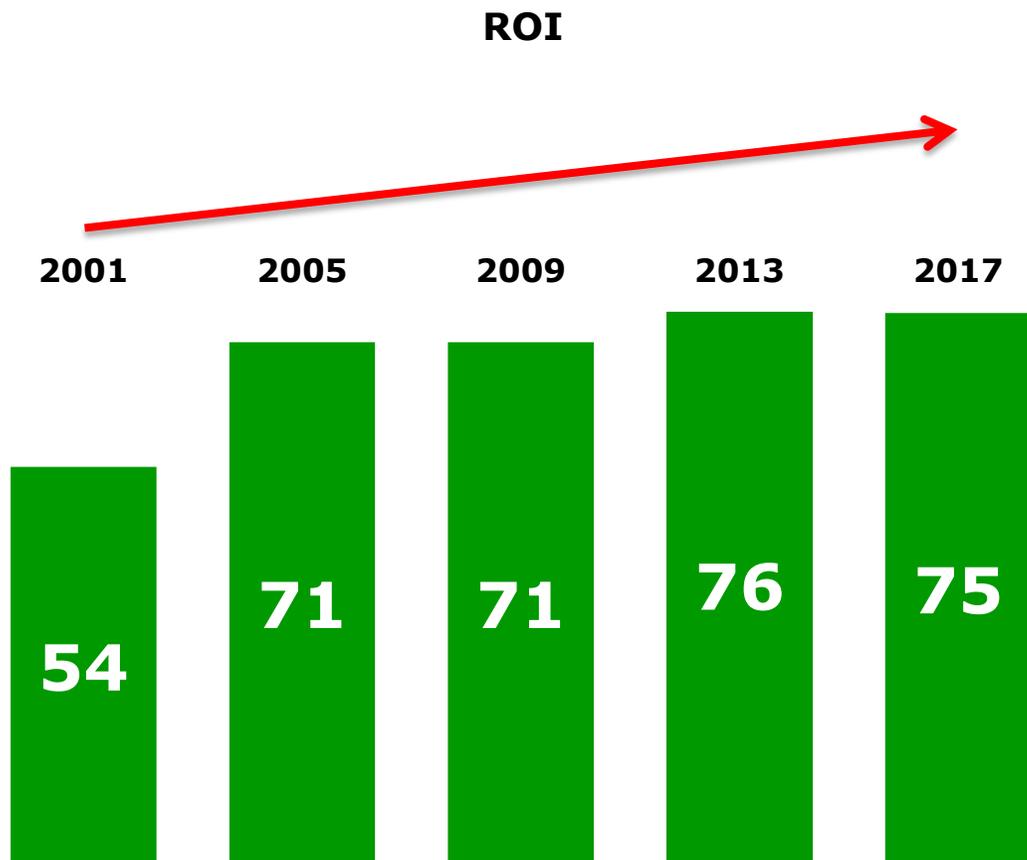
2013

2015

2017

Quality Symbols are more important for ROI

Checking for Symbol of Quality label

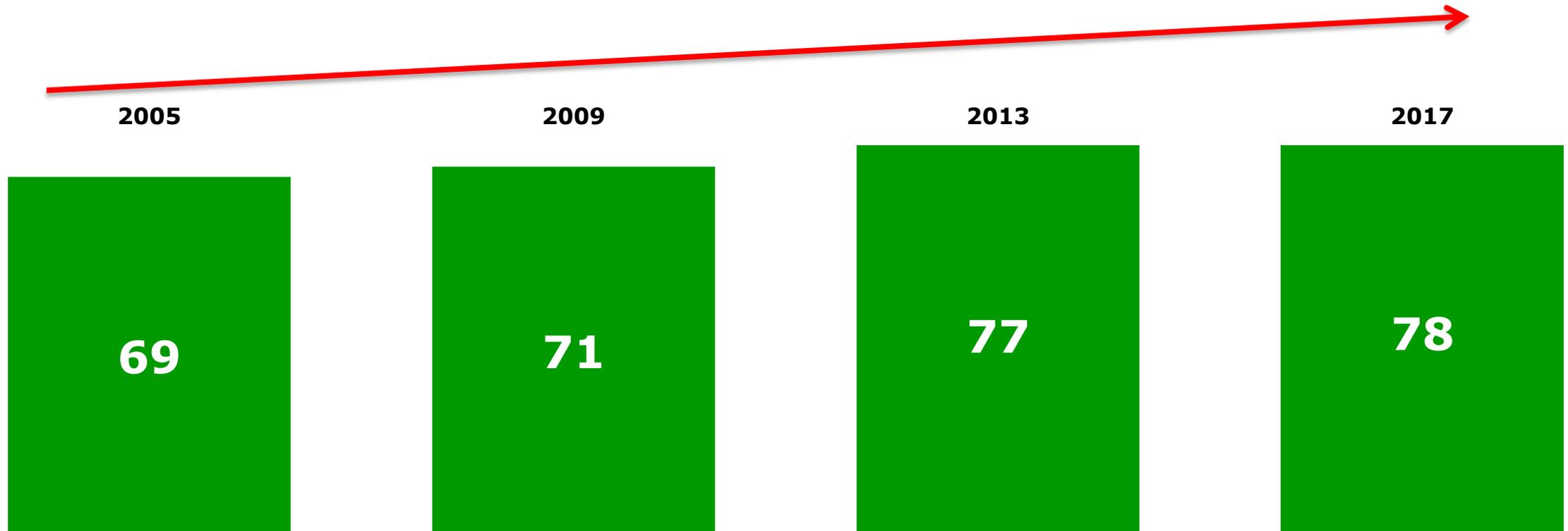


Checking Country of Origin is also important



Checking for Country of Origin

ROI %

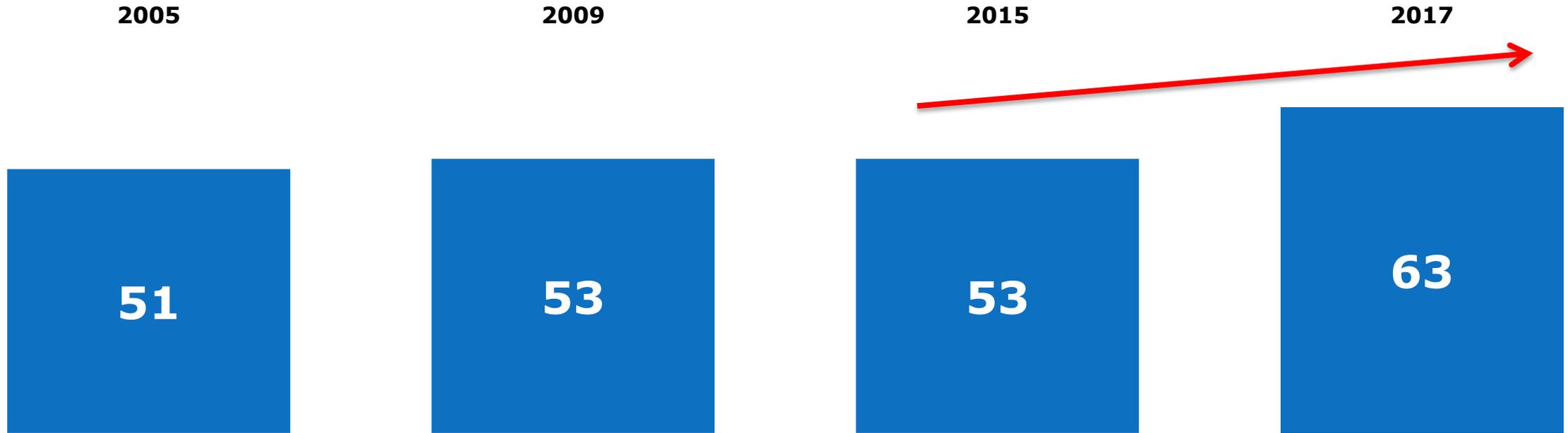


Biggest spike from 2015 to 2017 in GB



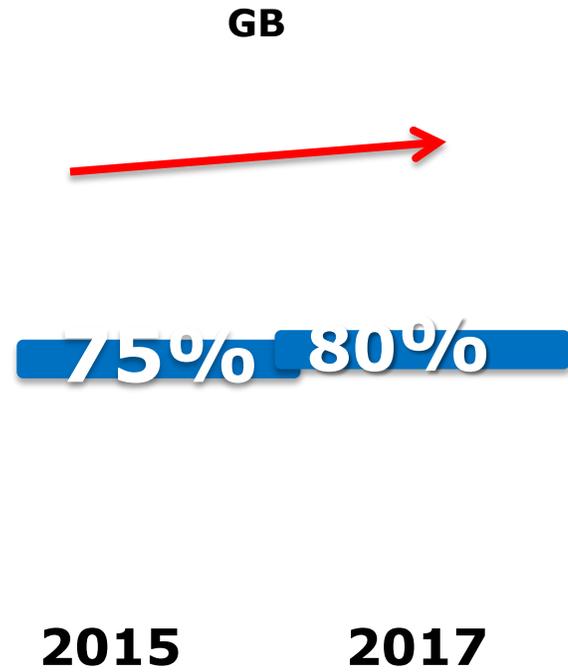
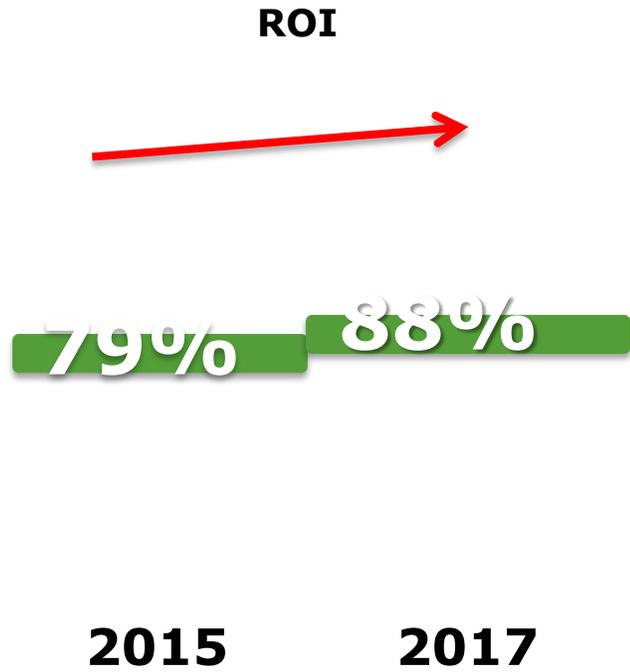
Checking for Country of Origin

GB



Awareness of Term Food Waste

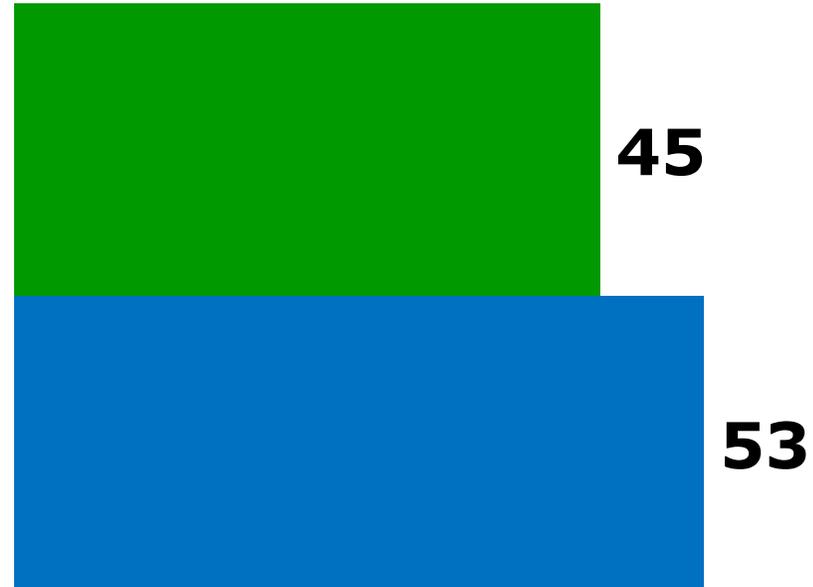
% Aware of Food Waste



Almost 1 in 2 concerned with food disposal

% Agree

I am concerned about the amount of food I throw away

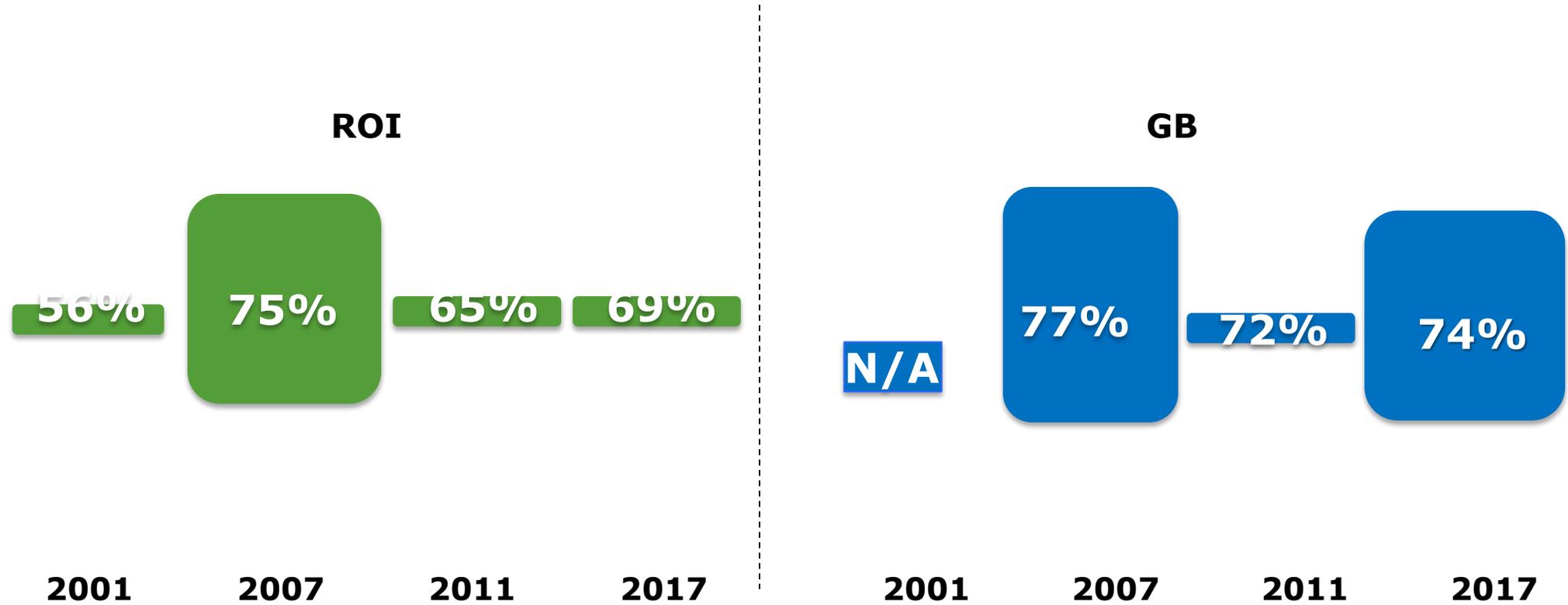


■ ROI 2017
■ GB 2017



Convenience

Continuing demand for foods that are quick to cook



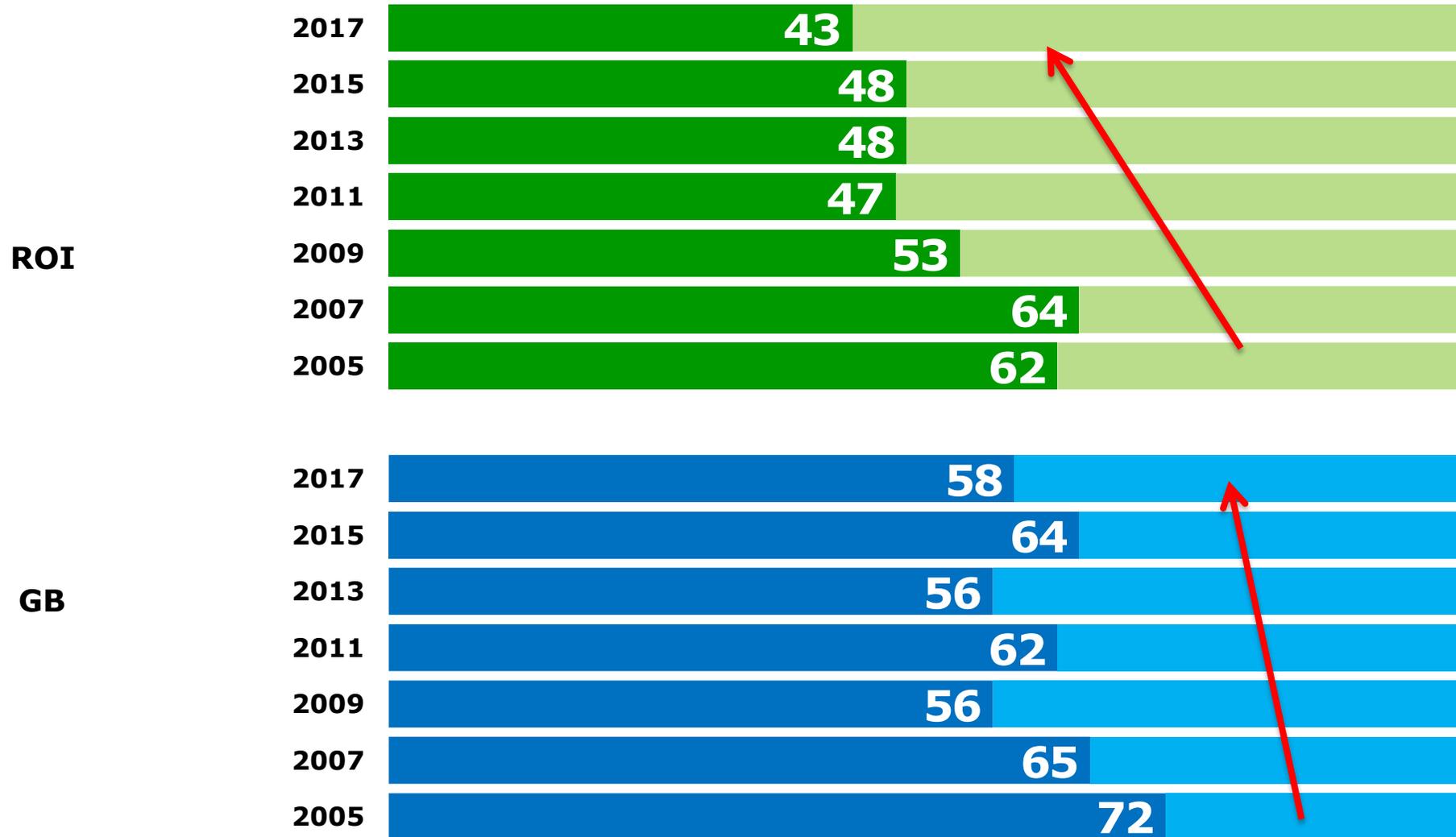
Convenience, Speed and Ease are important

% Agree strongly/slightly



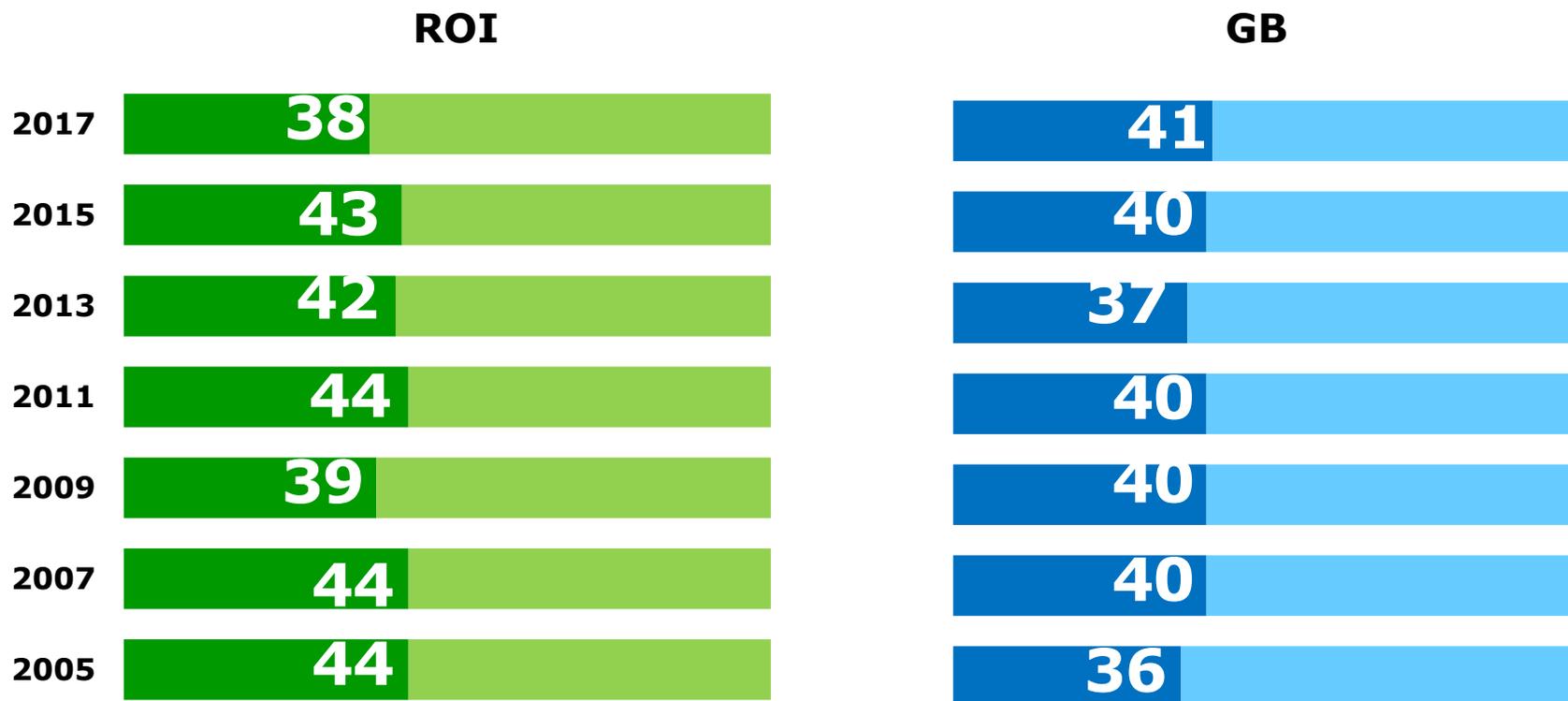
Convenience Meals becoming less frequent

% agree that they 'would often eat ready prepared/ convenience meals'



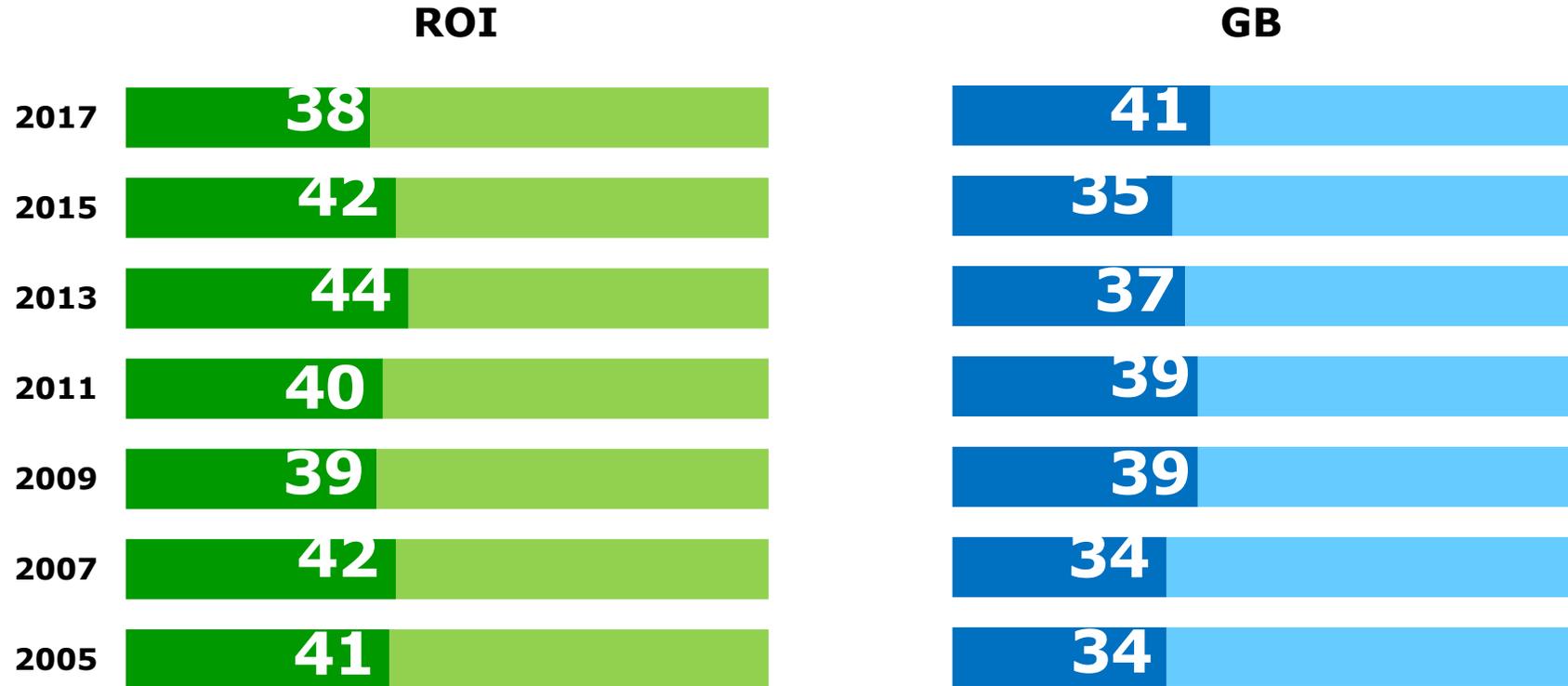
Only 4 in 10 agree they taste great

% agree that convenience meals...*'taste great'*



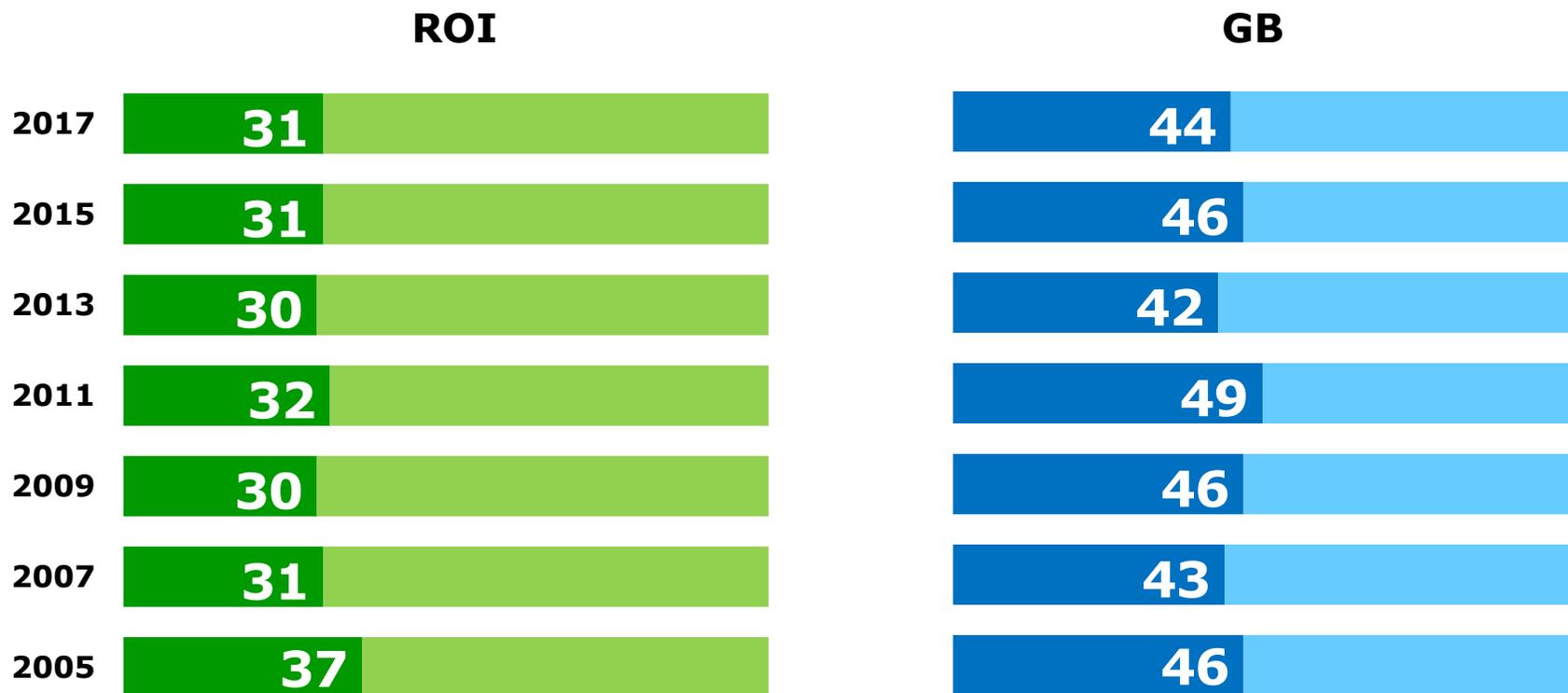
4 in 10 believe they have poor quality ingredients

% agree that convenience meals...*'have poor quality ingredients'*



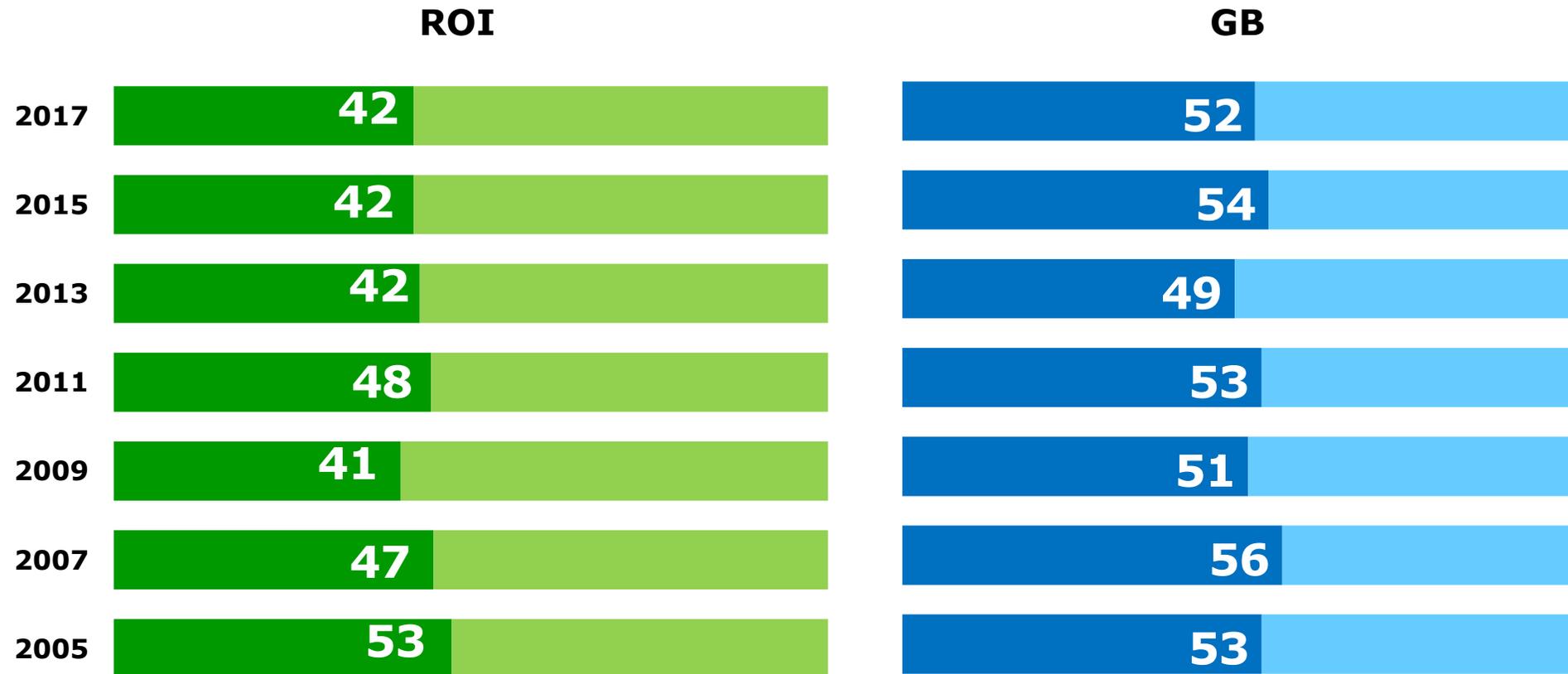
Value for money is also challenged

% agree that convenience meals...*'are good value for money'*



While 4 in 10 see them as a good substitute

% agree that convenience meals...*'are a good substitute'*



Ordering fresh meal prep kits is limited

Frequency of Ordering Fresh Meal Prep Kits



88% - Never



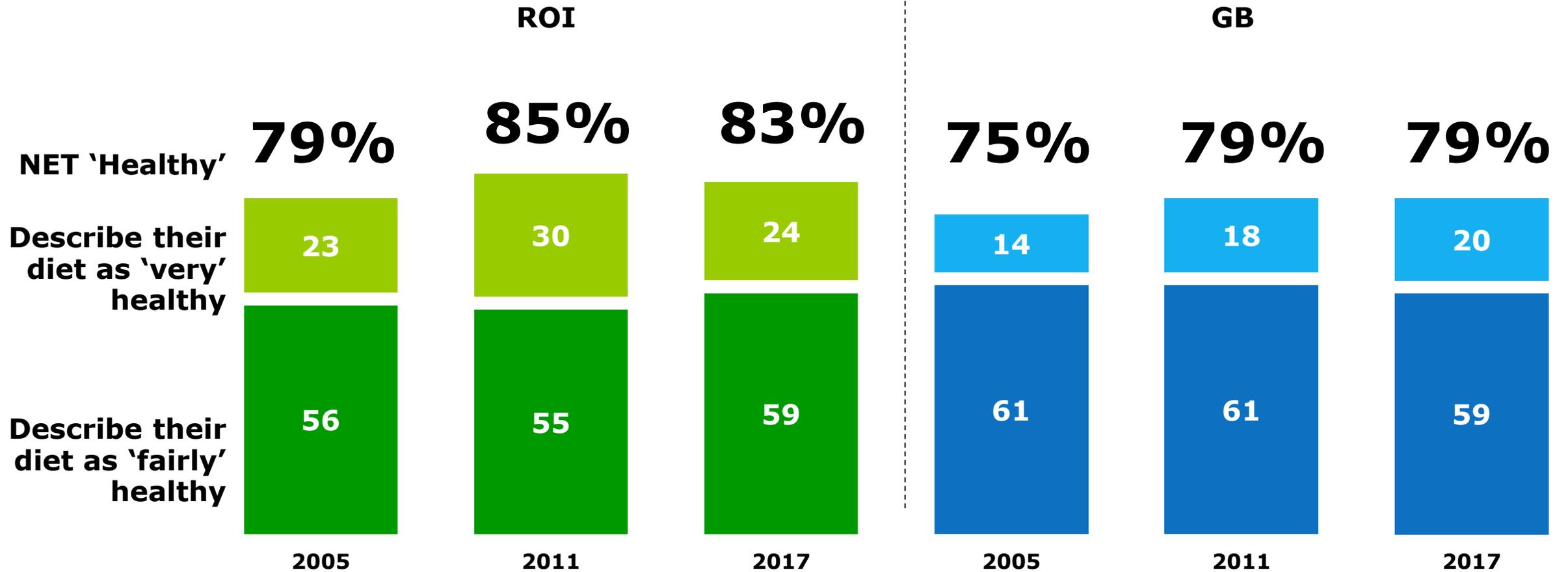
86% - Never



Health

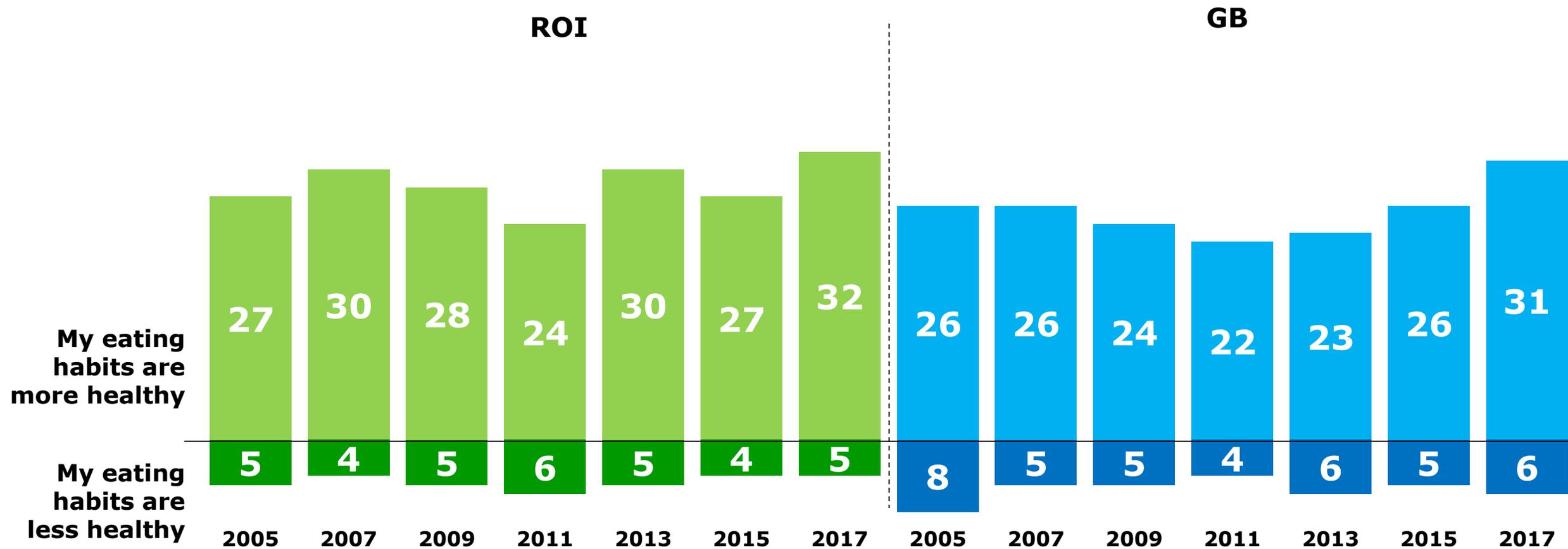
Perceptions of health remain high

Diet Perceptions in each country



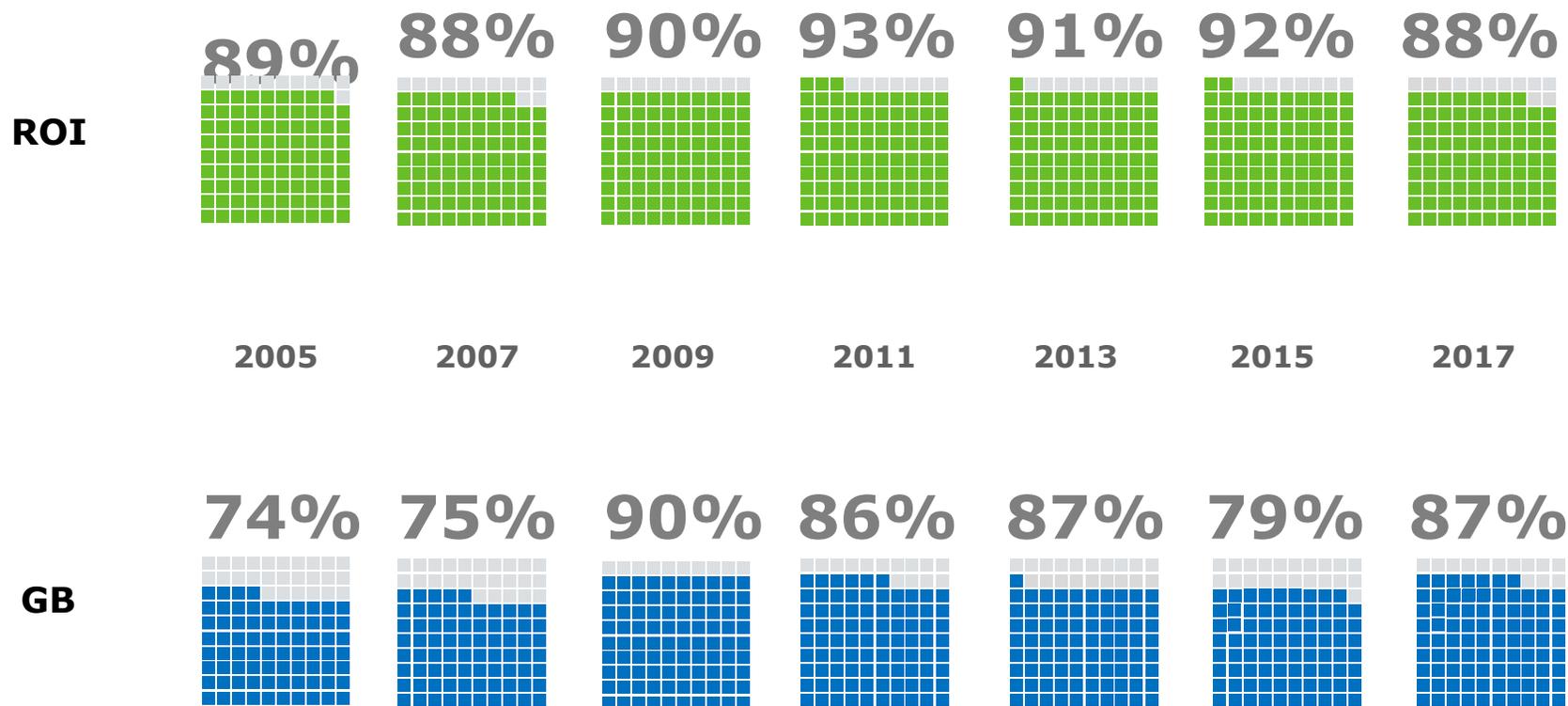
1 in 3 saying they're eating healthier

Changes in eating habits in last 12 months



Eating properly is important for health

% agree that 'To be healthy it is important to eat properly'



Balanced diet for kids is important

% Agree strongly/slightly

■ ROI 2017

■ GB 2017

**I am conscious about my children's
sugar intake***



**I try to ensure that my children
have a balanced diet***

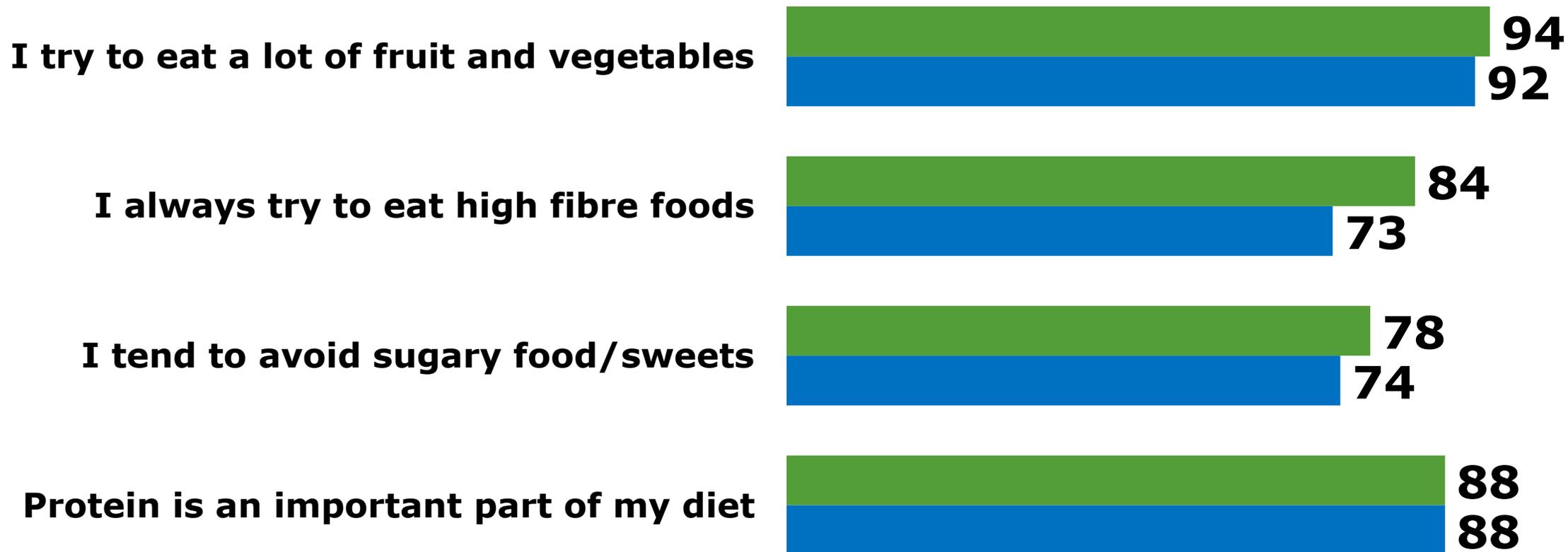


**I find it difficult to get my kids to
eat vegetables with their dinner***



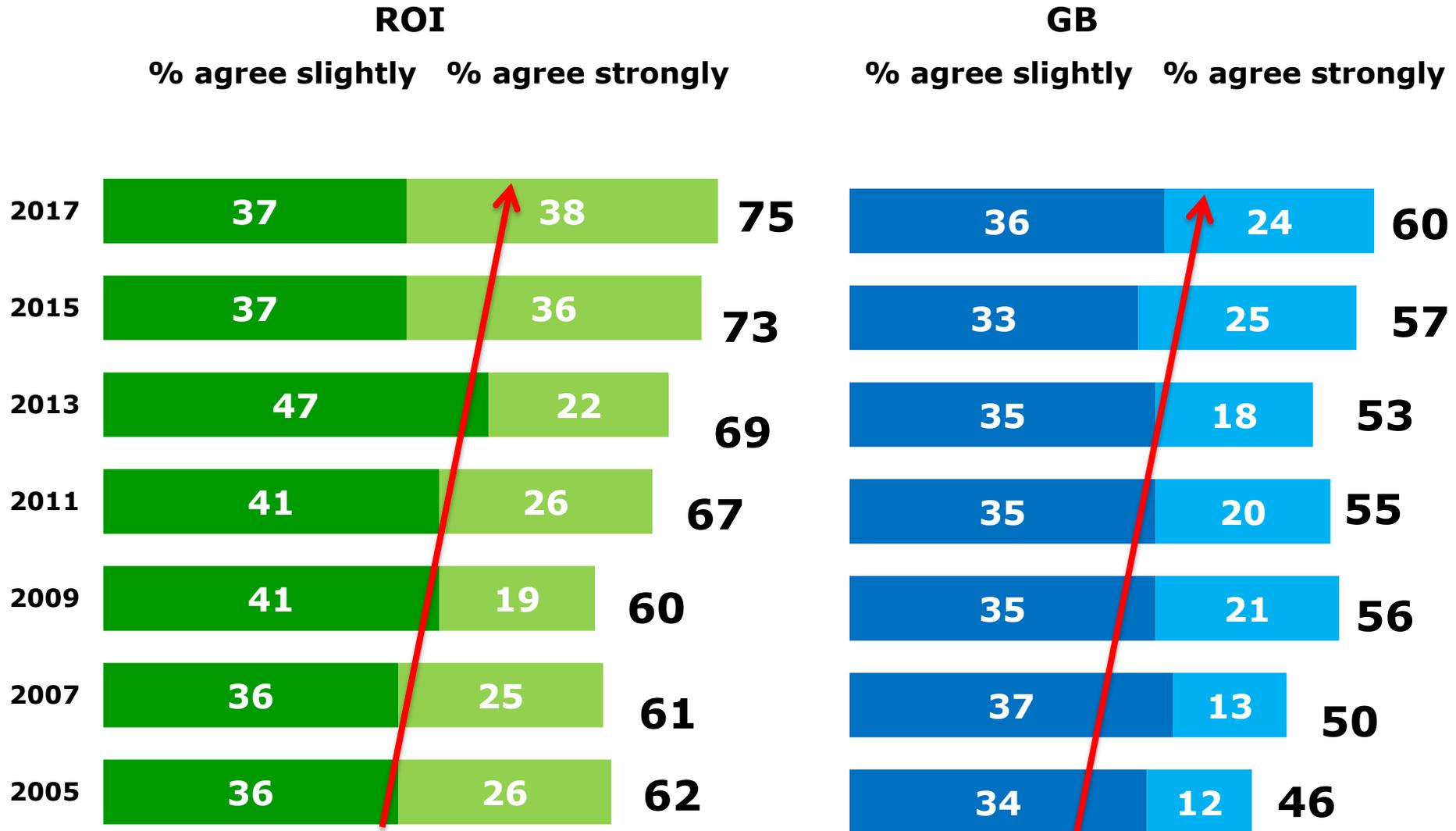
As it is for adults...

% Agree strongly/slightly



Consumers eat healthy to take control

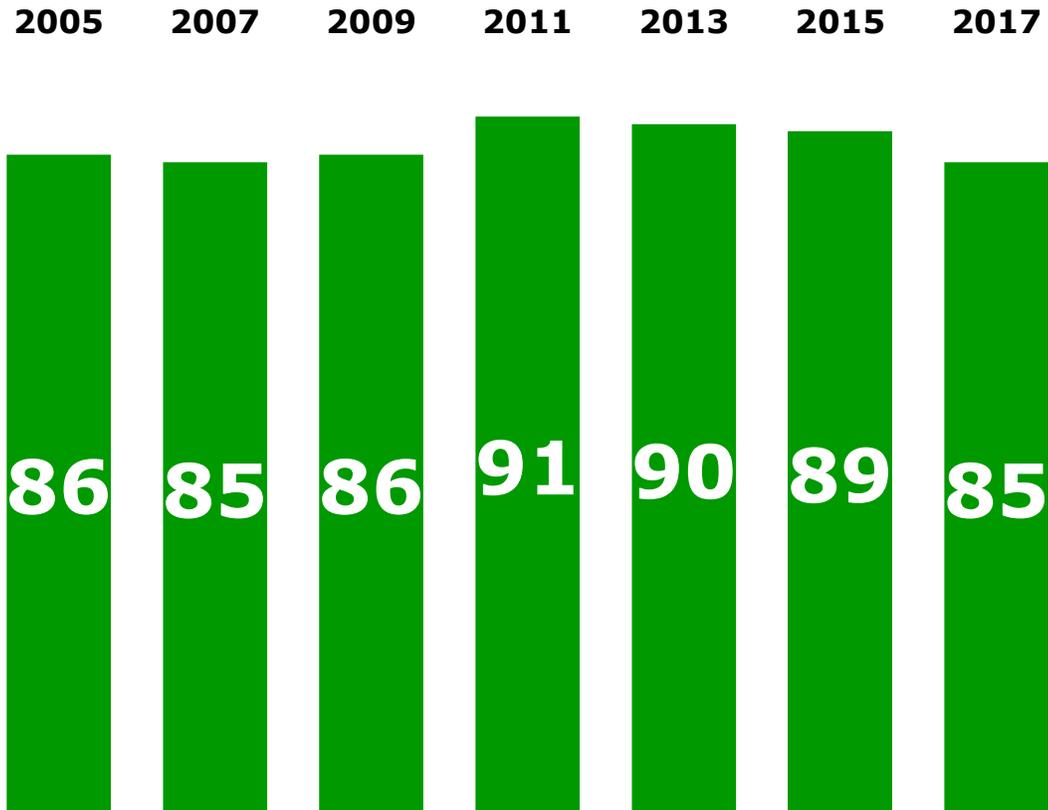
I eat healthy to take control of my life



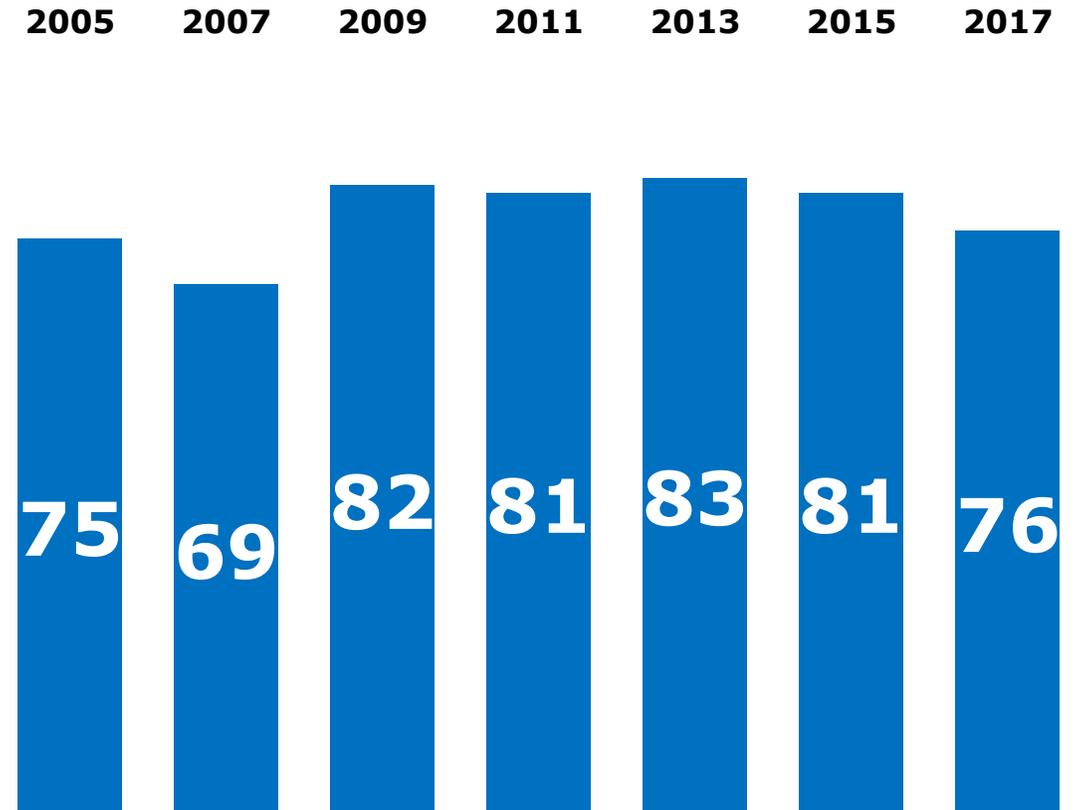
Food is perceived to enhance body and mind

Good food can enhance body & mind

ROI



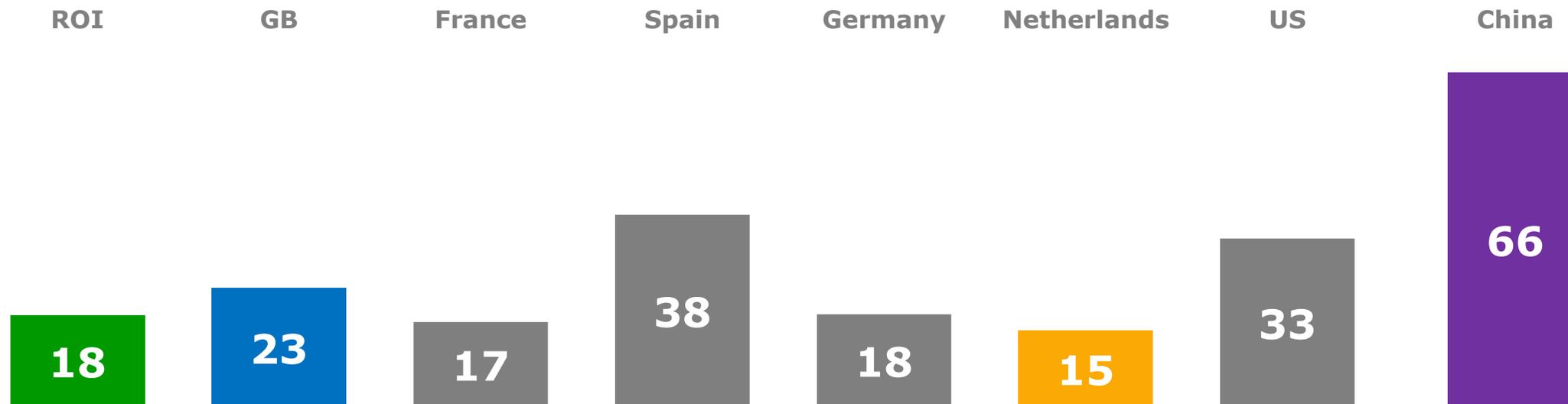
GB



Wearing technology to measure our health

I use wearable technology such as Fitbit, Apple watches etc. to help me be healthy

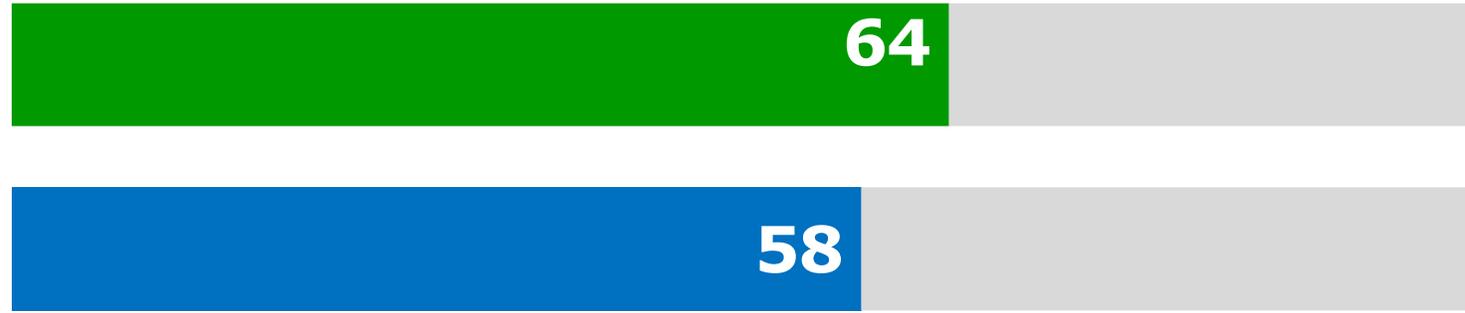
% agree



We eat for enjoyment

% Agree strongly / slightly 2017

*I eat for
enjoyment and
not for health
reasons*



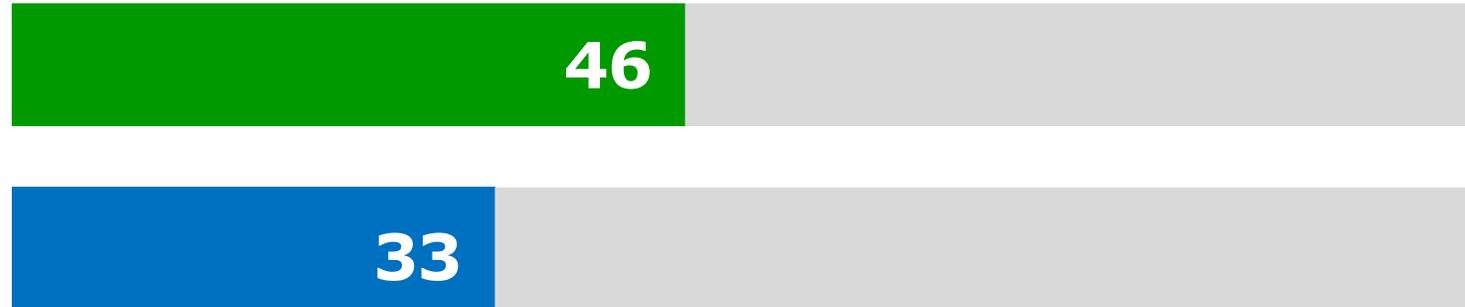
ROI

GB

But we are also confused

% Agree strongly / slightly 2017

*I am often
confused about
what I should eat
to stay healthy*



ROI

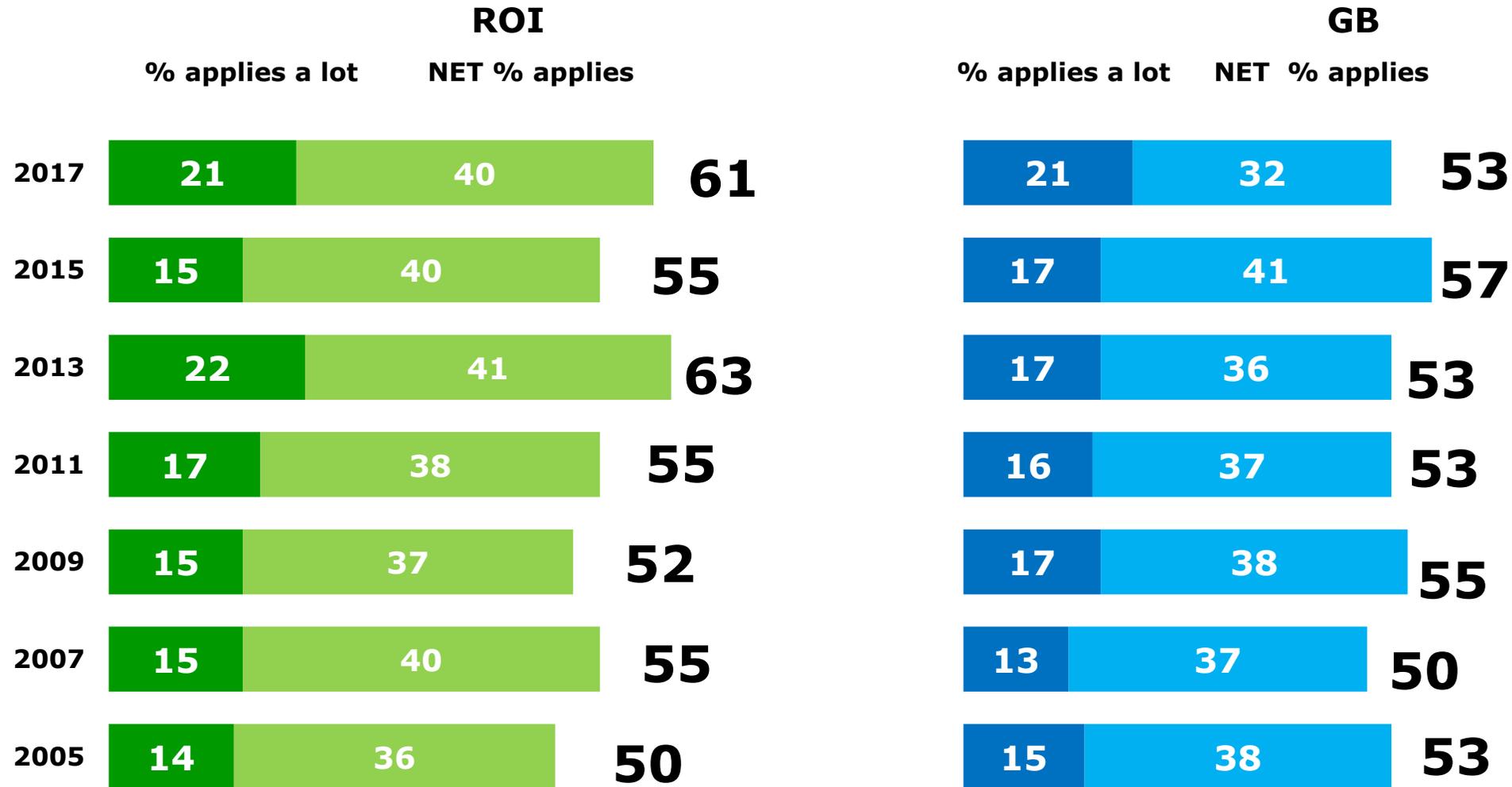
GB

ROI

GB

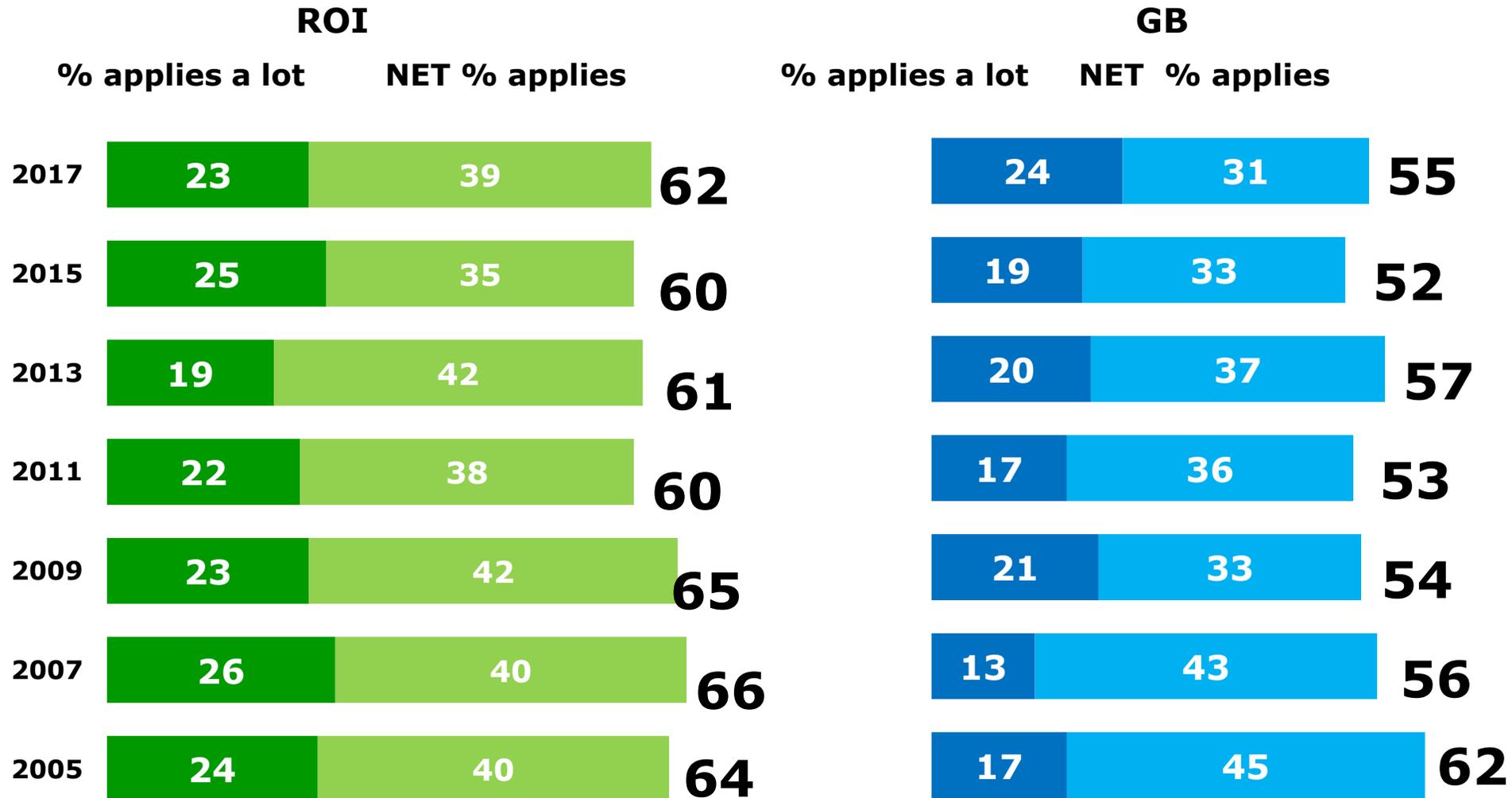
Checking nutritional labels is important

% applies that they 'always check nutritional labelling on food before buying it'



However nutritional claims are hard to understand

% applies that they 'find it difficult to understand nutritional claims on packaging'

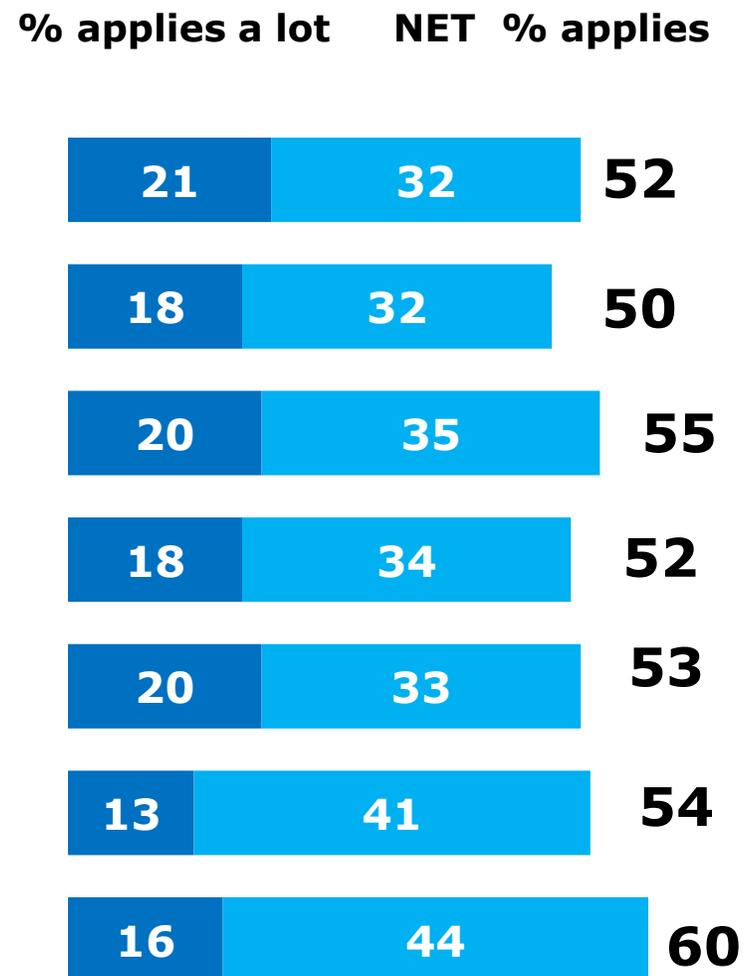
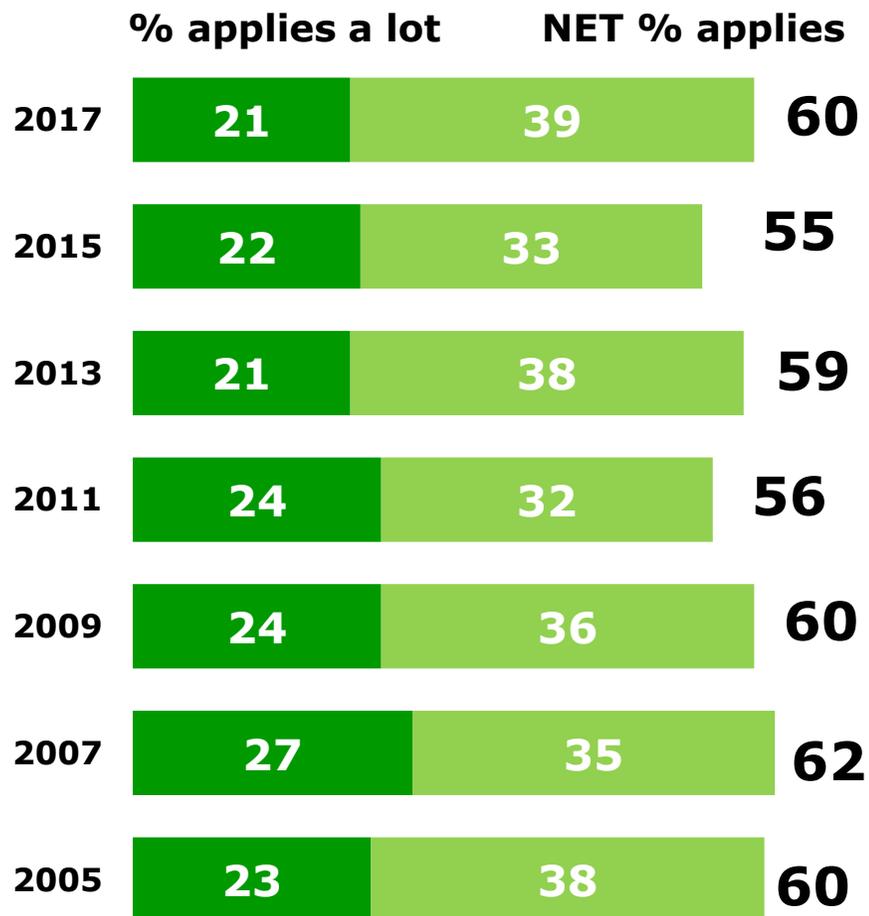


As is food labelling

% applies that they 'find it difficult to understand labelling on food'

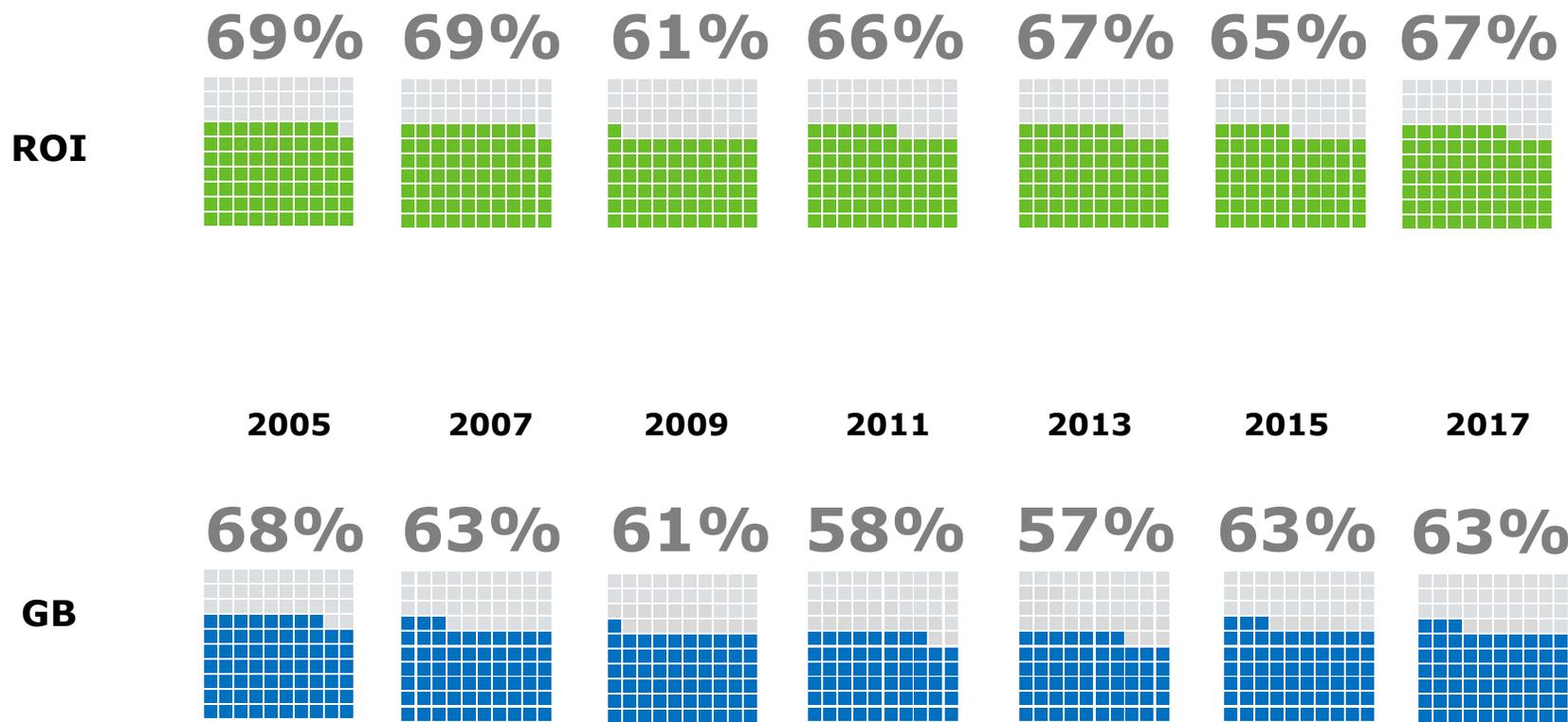
ROI

GB



Consumers want your help to eat healthy

I would like manufacturers to help me eat healthy



Sugar is under pressure

ROI

'I always check the label for sugar content on foods before buying them'

2017



59

GB

'I always check the label for sugar content on foods before buying them'

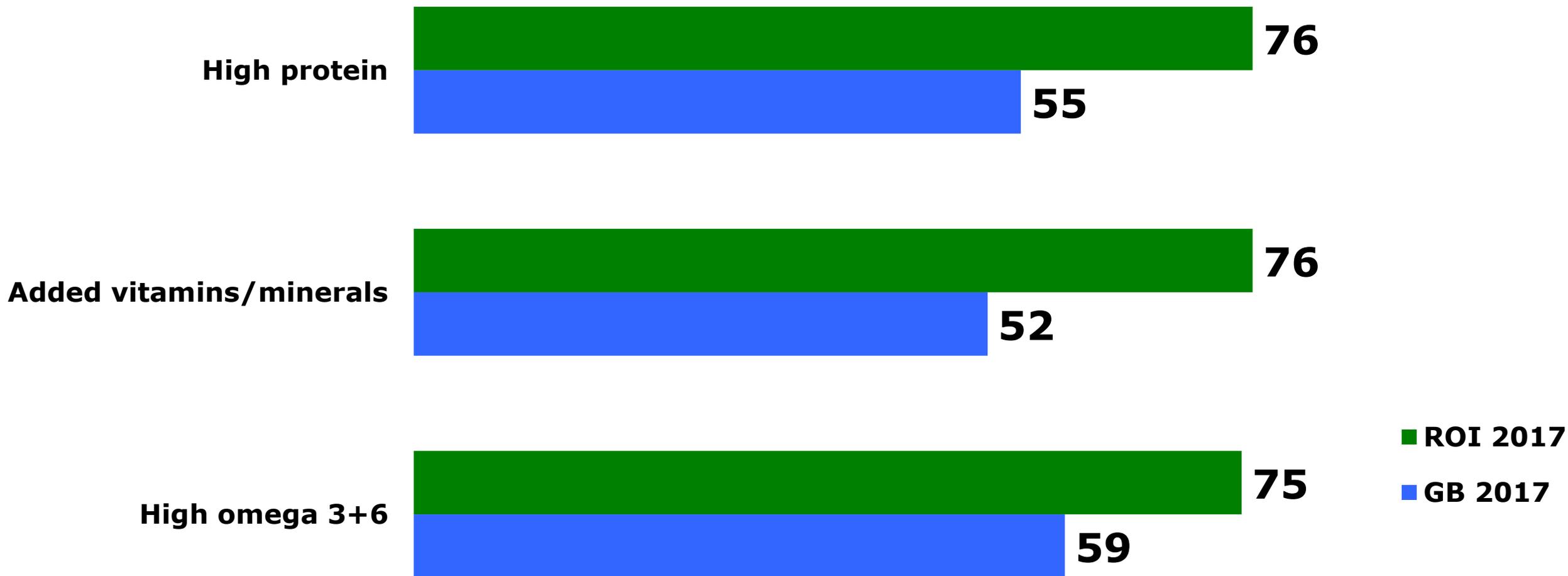
2017



59

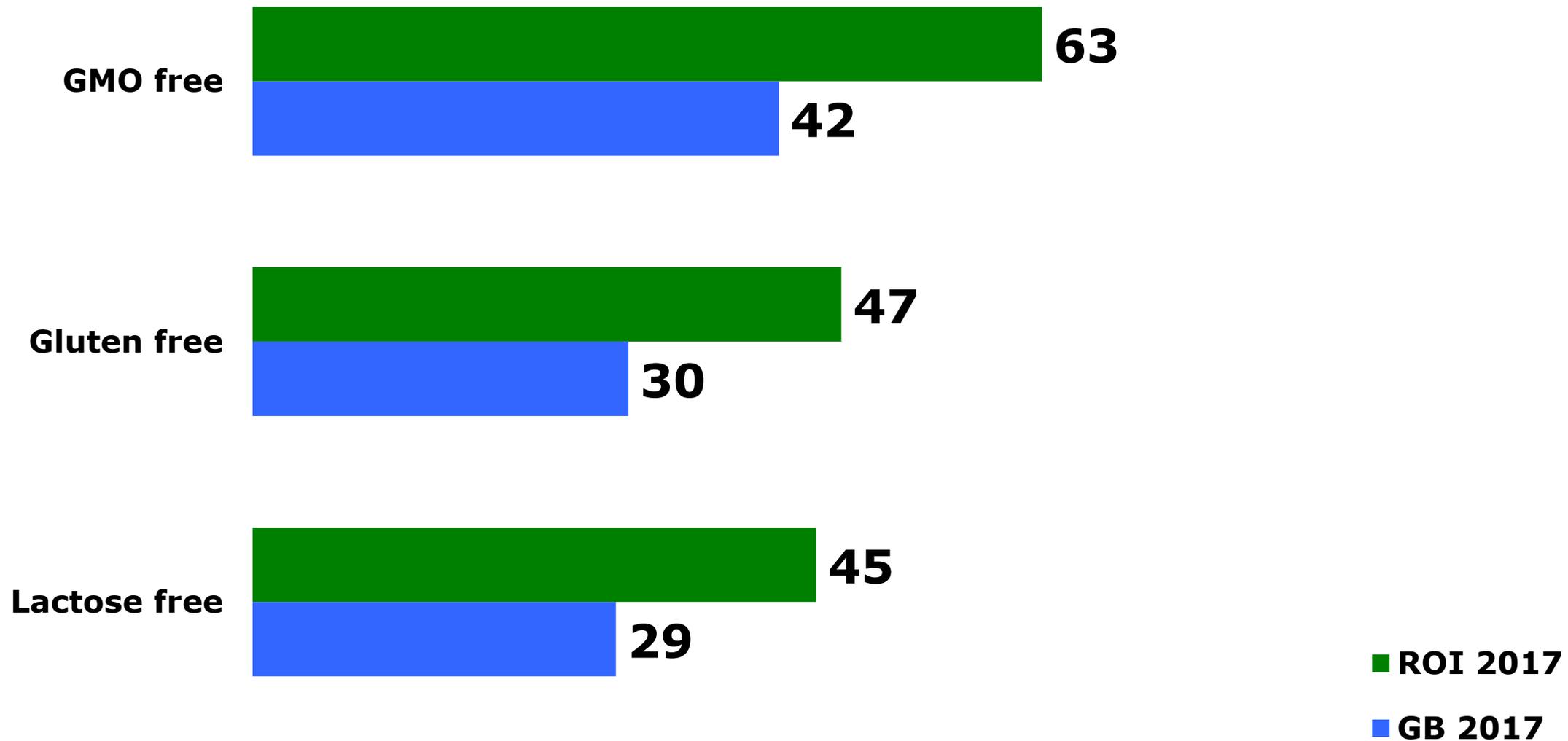
Importance of Added Functional Benefits

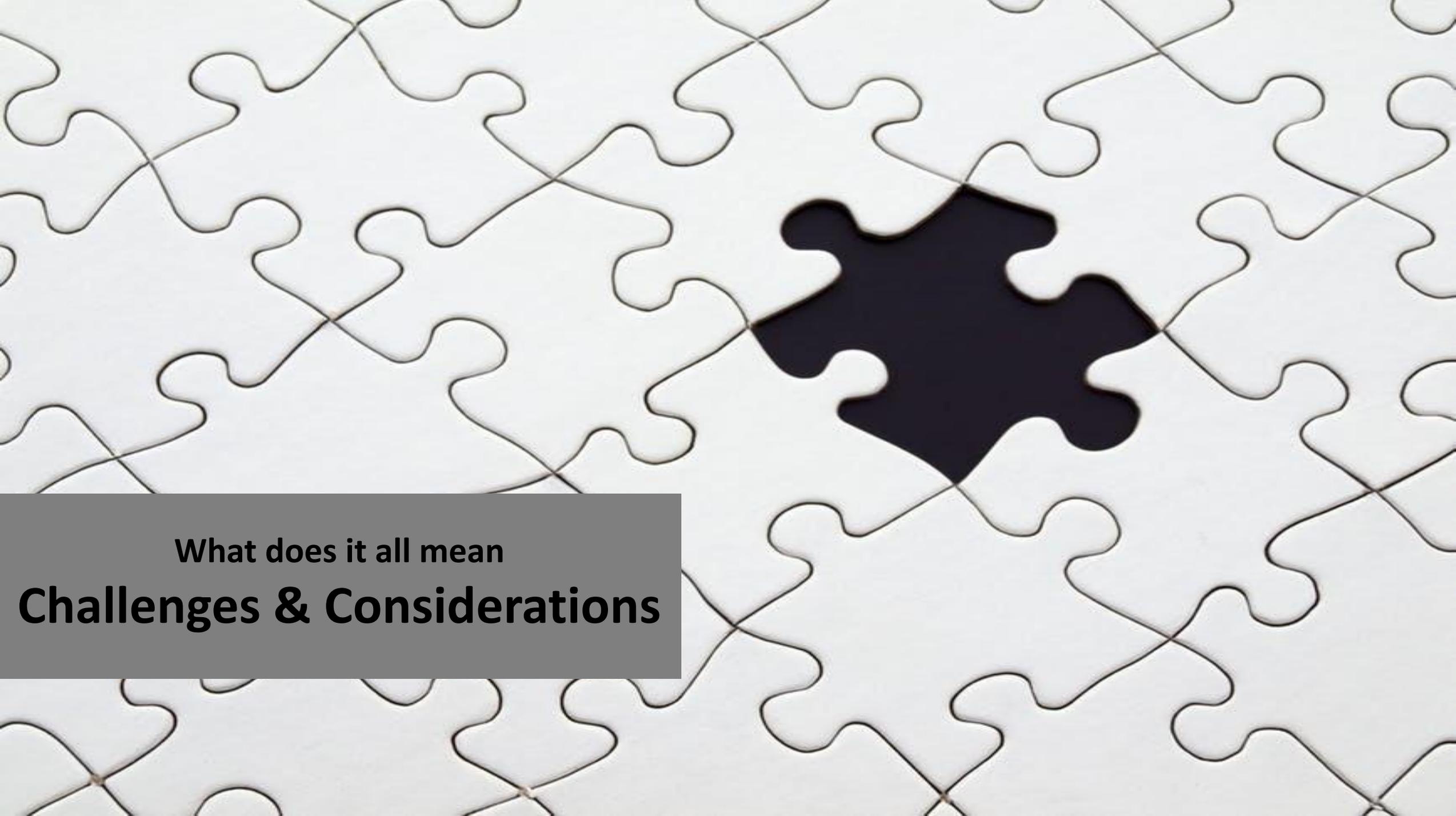
% Very/fairly important



Importance of Free From labels

% Very/fairly important



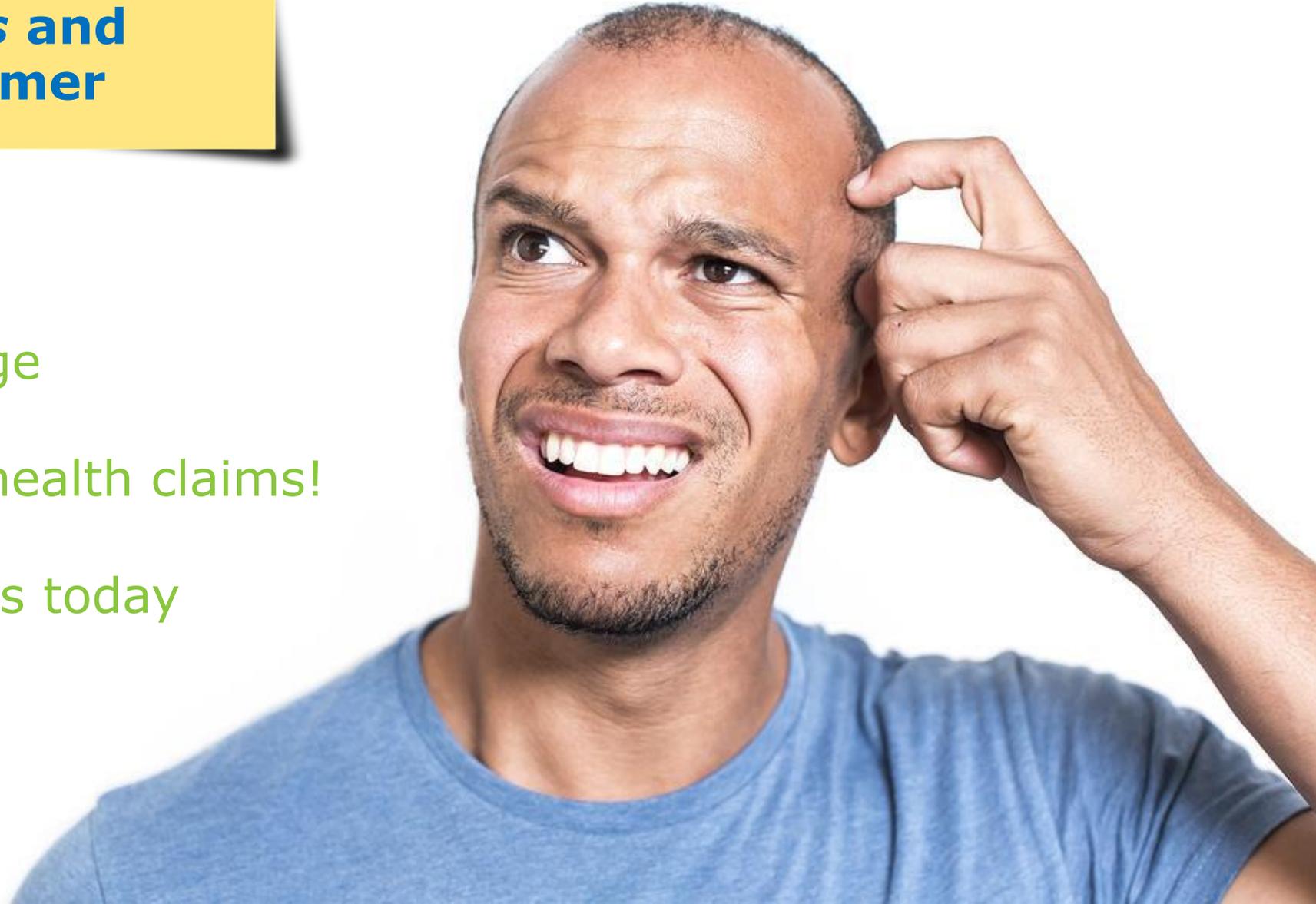


What does it all mean

Challenges & Considerations

**Challenges and considerations:
Help for the more
health conscious and
confused consumer**

- ✓ Improve label language
- ✓ Manage the world of health claims!
- ✓ Understand the drivers today



Challenges and considerations: Addressing the *Busy Consumer*

- ✓ Create higher quality convenient offerings
- ✓ Create interesting and engaging brands – be relevant!
- ✓ Promote ingredients within
- ✓ Building meals around specific functional propositions



**Challenges and considerations:
Addressing the
*Changing face of Green***

- ✓ Build transparent and environmentally friendly supply chains
- ✓ Review packaging with a green eye
- ✓ Help the consumer understand the benefits of local





RoI & GB

PERIscope 2017

Irish and British Consumers and their Food Summary



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SNACKING TODAY

The role of healthy snacking

January 2018

Scope & Contents

The world of snacking today: context and headlines

Healthy snacking: key influencers

Understand snackers today, their repertoire and the occasions and relationships with snacking

Assess purchasing habits and key motivators

Identifying challenges and resolutions



Our research partners



September to
November 2017



The Thinking House

Bord Bia
Irish Food Board

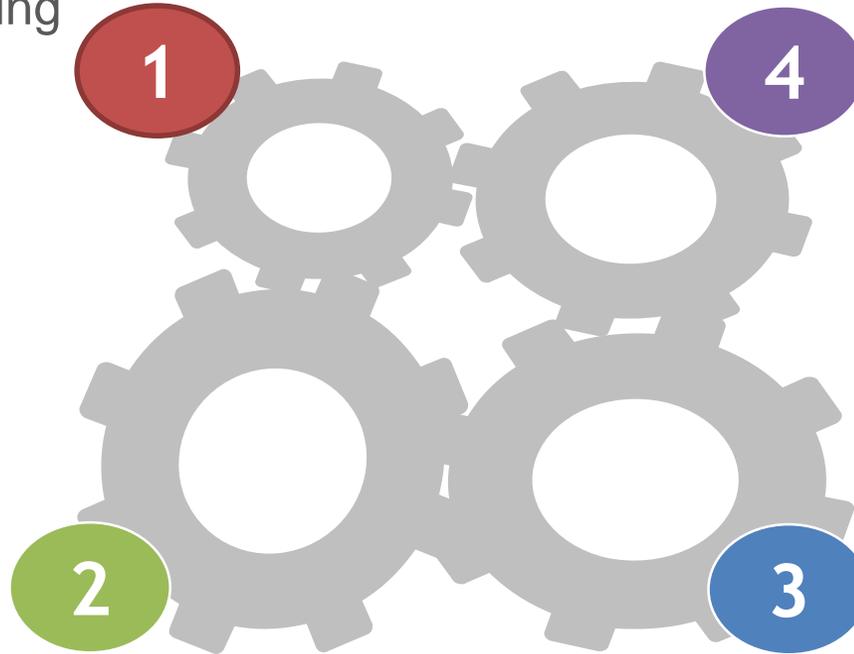
The research had 4 elements

Situational Analysis

Using desk research analysing traditional & social media influences to examine the wider macro landscape relating to snacking

Quantitative Surveys

3 elements of quantitative research needed to establish the state of play in both markets; A UK omnibus & Irish omnibus and UK survey on snacking occasions and attitudes



Pre-Tasks

Pre-tasks designed to delve into the day-to-day of our participants allowing us a 'behind the scenes' look using a ShadowCam and Collage tasks

Workshops

2 hour workshop style groups with 7-8 participants; covering current behaviours, brands & products purchased, definition of healthy and impact of packaging



Details of the quantitative elements

There were three quantitative elements to the research
– 2 omnibus studies and 1 ad-hoc study among snackers

UK Omnibus & Irl Omnibus

Both nationally representative studies, flagged as follows:



UK nat rep n=1,000



Irl nat rep n=1,004

UK Snacking Survey

Study focus:

- 18-54 year olds who snack
- Some interest in eating healthily

Represents about 57% of 18-54 year olds in UK

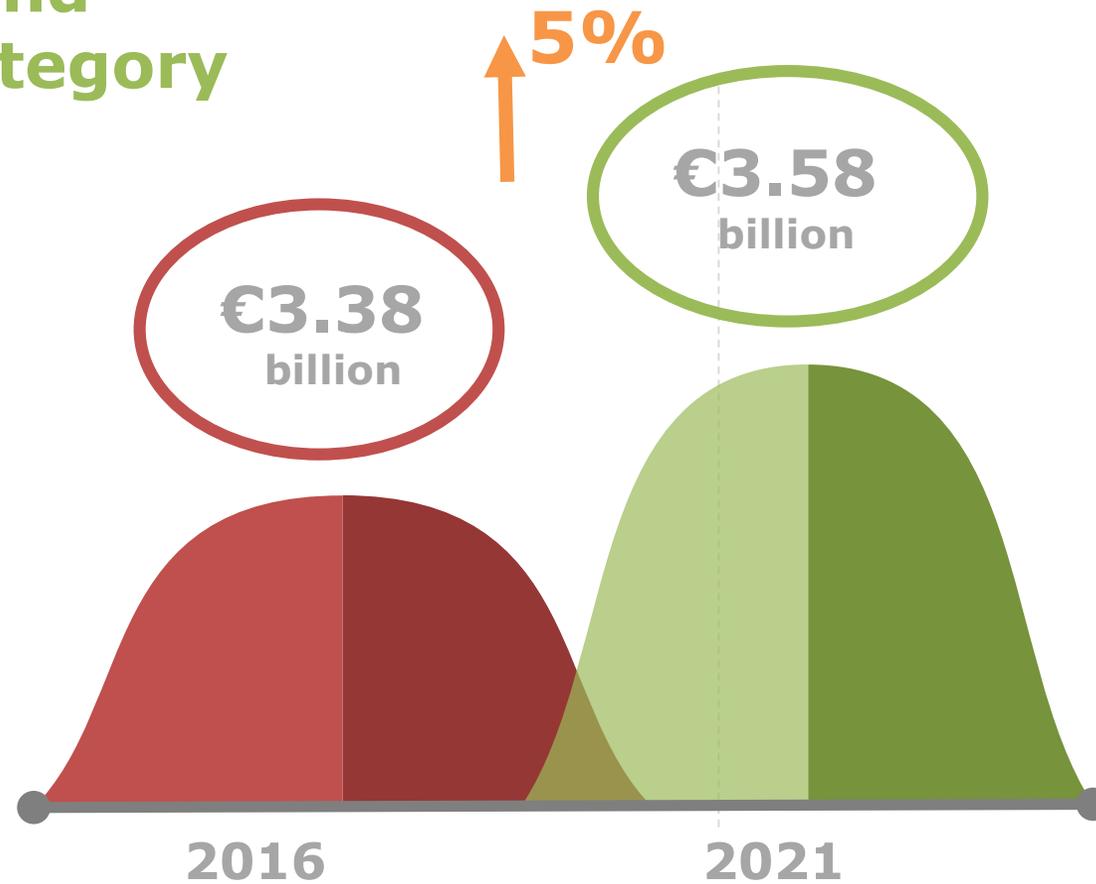
Flagged as: UK snackers aged 18-54 n=1,000



A sizeable bite – the snacking category today



The All Ireland Snacking Category



What is a snack?

A shopping cart filled with various snacks. Visible items include a box of Heidi-Ho Crackers, a bag of Doritos, a bag of Twinklacks, and a box of Double Measure. The cart is overflowing with these items, and the background is a blurred store aisle.

snack

v.

c.1300, "to bite or snap" (of a dog), probably from Middle Dutch or Flemish *snacken* "to snatch, snap; chatter," which Watkins traces to a hypothetical Germanic imitative root **snu-* forming words having to do with the nose (see [snout](#)). The meaning "have a mere bite or morsel, eat a light meal" is first attested 1807. Related: *Snacked* ; *snacking* .

**Battle of the oldest snack foods
in the world is still raging on!**



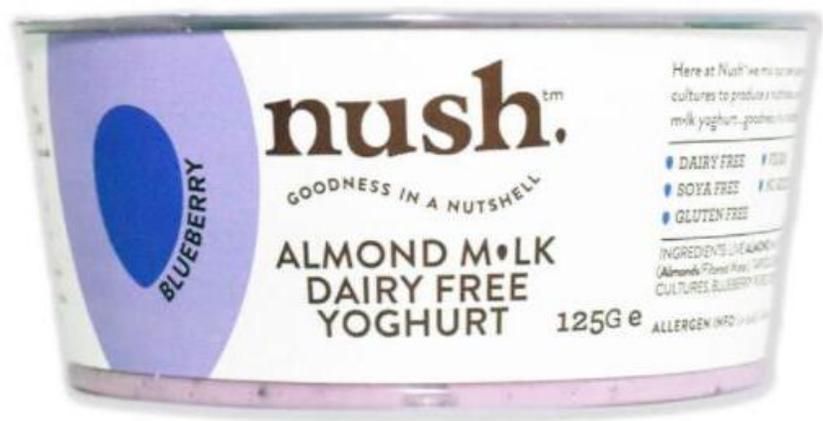
The snacking landscape 20 years ago



The snacking landscape today



Nearly 60% of all snack foods are now positioned in health



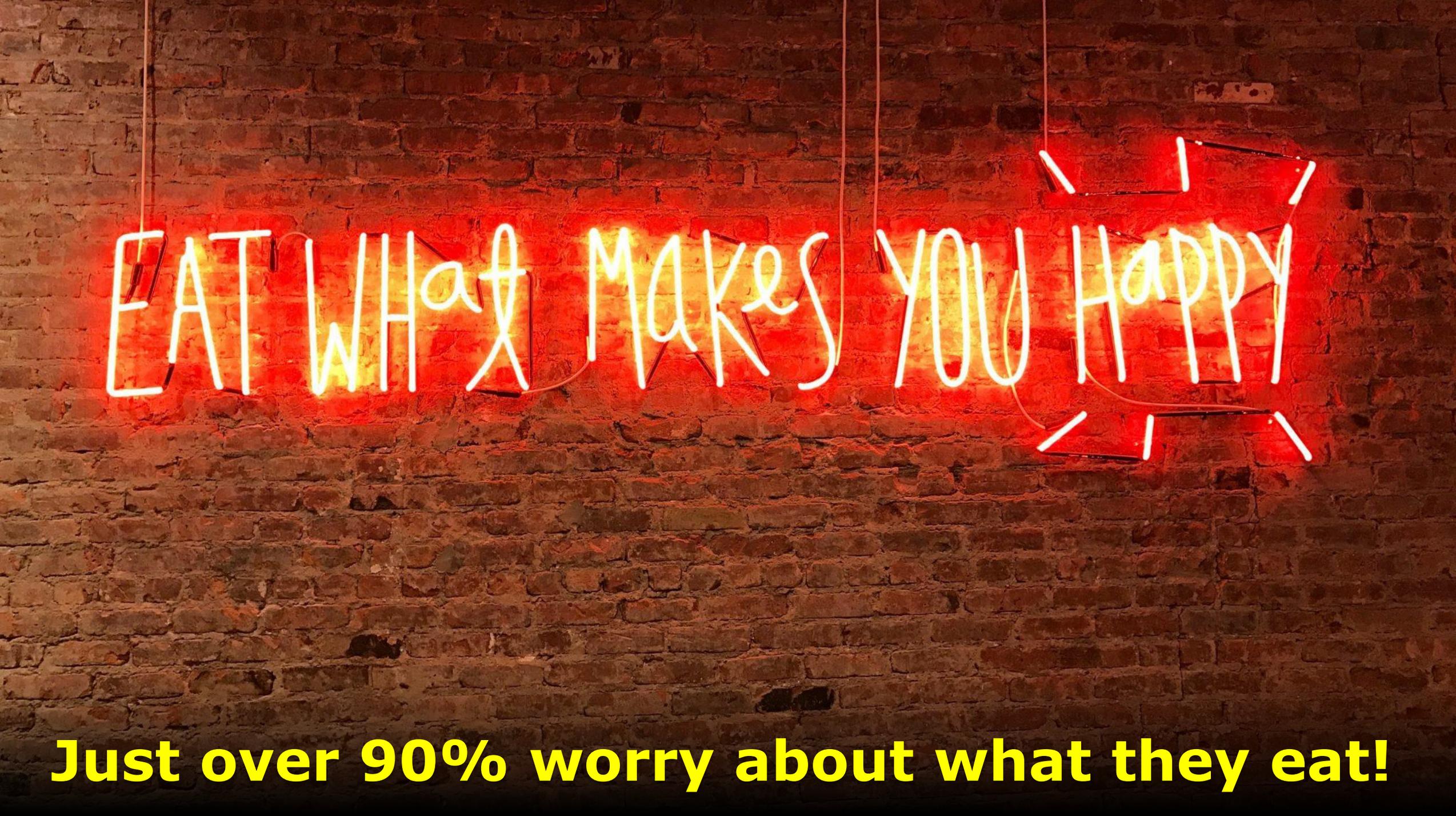
4 in 10 people in Ireland are snacking more often nowadays



A close-up photograph of a person's hands using a fork to pick up a piece of food from a white plate. The plate contains a variety of colorful vegetables, including yellow and red bell peppers, green zucchini, and small red tomatoes. The setting is a restaurant table with several glasses, a lit candle in a glass holder, and a white napkin. The background is softly blurred, showing another person's arm and a white plate.

Snacking more often is more common amongst a younger profile

43% of over 65s eat at mealtimes vs 24% of U65s

A neon sign is mounted on a dark brick wall. The sign consists of white neon tubing forming the words "EAT WHAT MAKES YOU HAPPY". The word "WHAT" is written in a cursive script, while "EAT", "MAKES", "YOU", and "HAPPY" are in a simple, blocky sans-serif font. The sign is illuminated from within, casting a warm, yellowish glow. To the right of the text, there is a square neon frame with a red glow, possibly representing a smiley face or a decorative element. The brick wall is dark and textured, with some mortar lines visible.

EAT WHAT MAKES YOU HAPPY

Just over 90% worry about what they eat!

... and 3 in 4 are “Trying to be Good”



Disciplined



Trying hard

Good intentions

Guilt-free

8%

36%

34%

21%

10%

56%

26%

8%

I carefully manage my food and consider myself a very healthy eater

I eat healthily most of the time but do sometimes slip and eat unhealthy food / snacks

I have good intentions to eat healthily but am only successful some of the time

I tend not to worry about which foods are healthy and just eat what I enjoy

Base: UK nat rep n=2,000; Irl nat rep n=1,004



Yet our favourite snacks are still
crisps, biscuits, chocolate..

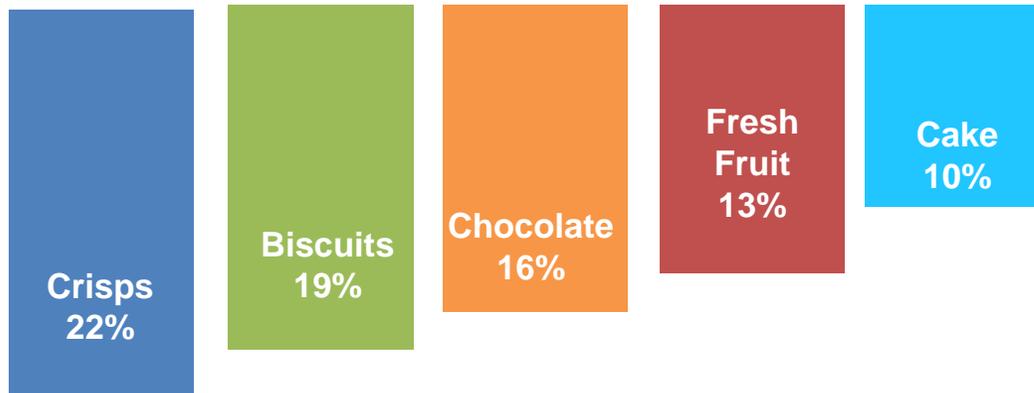


A majority of snacks eaten are unhealthy



Think about the last time you had a snack....

The top 5



Between 0-2%

- Protein Bar
- Dried fruit
- Granola bar
- Protein balls / bites
- Dried meat snack(s)
- Rice cakes
- Popped snacks
- Fresh vegetable snack(s)
- Seeds
- Popcorn
- Vegetable based dried snacks

Base: UK nat rep n=1,000

A constant battle between the twin desires of indulgence and being healthy

54%

Try to choose
snacks that are
healthy

vs

20%

Who don't

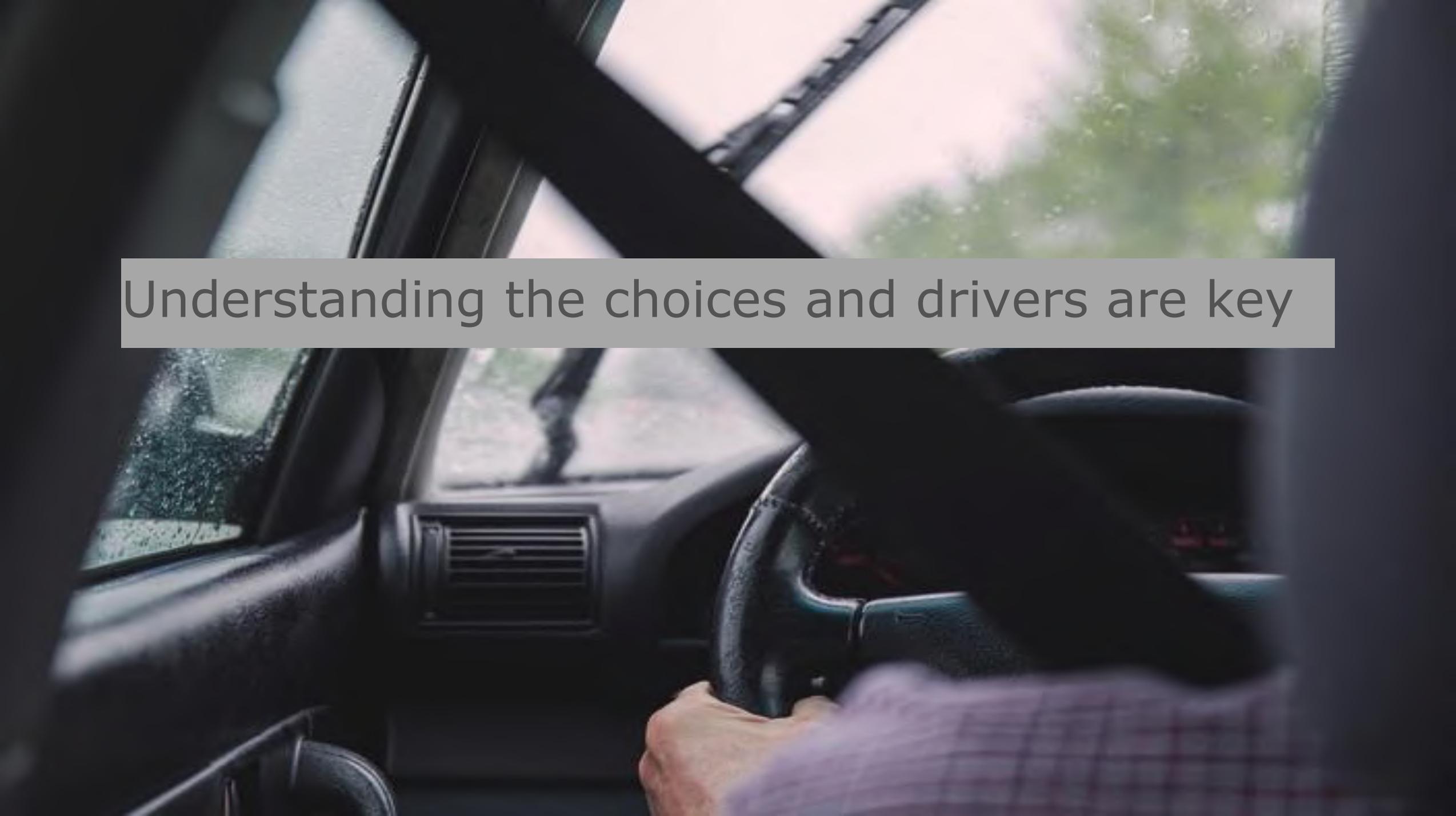
67%

Agree they use
snacks as a treat
between meals

vs

15%

Disagree

A photograph taken from the passenger side of a car, showing a driver's hands on the steering wheel. The driver is wearing a purple and white checkered shirt. The car's interior, including the dashboard and air vents, is visible. The view through the windshield shows a blurred outdoor scene with green trees. A semi-transparent grey rectangular box is overlaid across the middle of the image, containing the text "Understanding the choices and drivers are key".

Understanding the choices and drivers are key



Understanding
these two
drivers is key



CHOICE

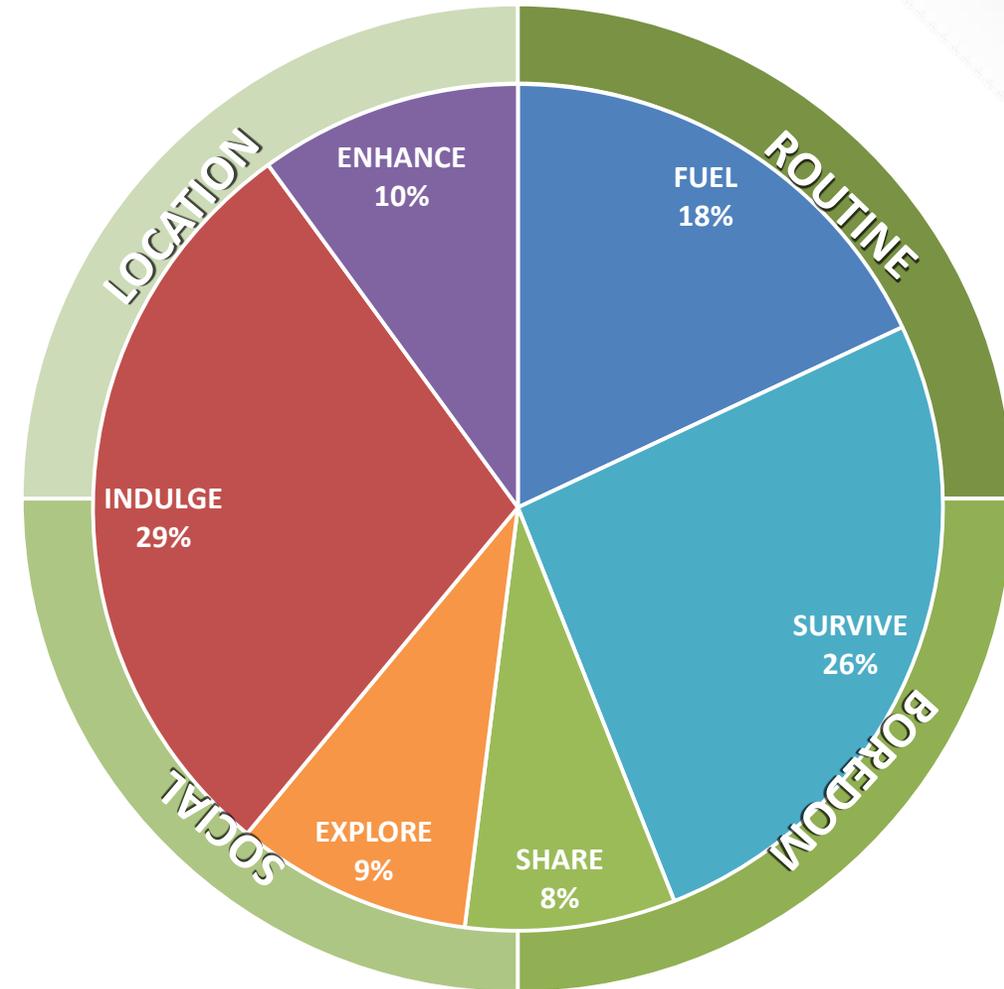
CONTEXT





Choice Architecture For Snacking

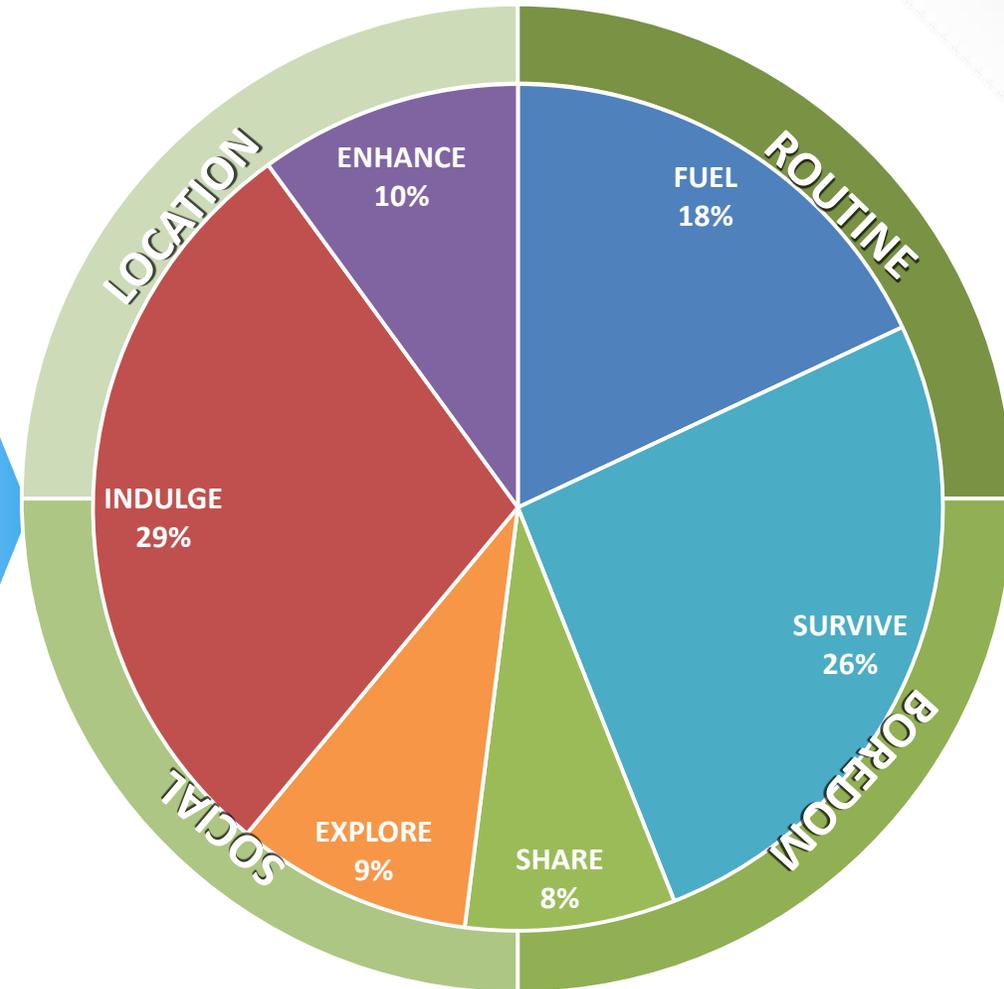
Which of these are typically important to you when it comes to choosing snacks?



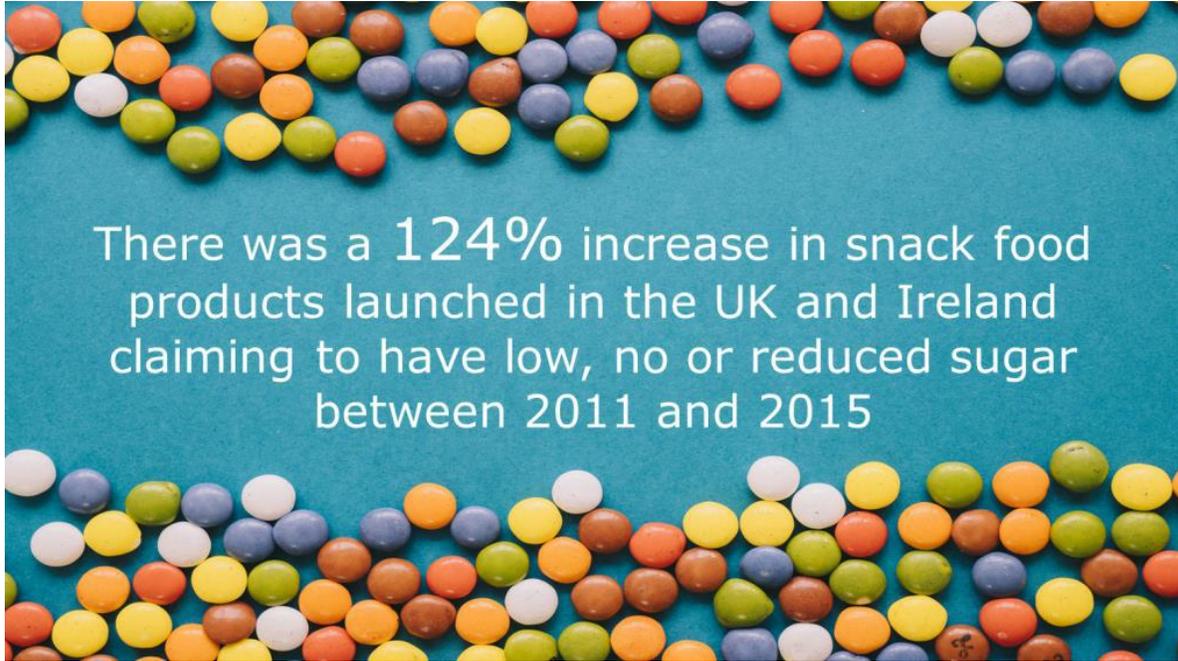


Choice Architecture For Snacking

For a treat; pure enjoyment (Indulge)	53 %
Simply to satisfy my hunger pangs (Survive)	44 %
Energy boost to keep me going (Fuel)	38 %
Fill me up and sustain me (Fuel)	33 %
Comfort me / feel good (Indulge)	32 %
Something new / a new experience (Explore)	19 %
Enjoy and share along with others (Share)	18 %
I choose it for its health benefits (Enhance)	16 %
Basic nutrition my body needs (Survive)	13 %
Guilt-free feel-good option (Enhance)	13 %
Something that makes me look good (Explore)	6 %
Nurture or provide for others (Share)	6 %



Health is now driving NPD in the snacking category



Healthy Snacking accounts for 9% of category, but is in double digit growth



A photograph of fresh produce on a white surface. In the foreground, there are several bright red raspberries. Behind them, a kiwi fruit is partially visible, showing its green skin and brown speckles. To the right, a portion of a bright pink plastic lid is visible. The background is a plain, light-colored surface.

Yet there is **STILL** limited NPD in snacking!

Low, no or reduced fat calorie or sugar versions accounted for less than 10% of NPD IN 2016

A close-up photograph of a person's hand holding a round, golden-brown cookie. The cookie is decorated with a dark blue, five-petaled flower. The background is a soft, out-of-focus white and grey.

People are looking for healthier versions of their favourite snacks..



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Moving towards healthy snacking The influences..

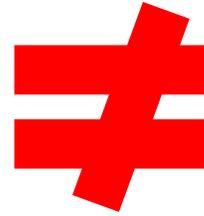
Understanding the world we live in..



The changing home environment



The way
it was



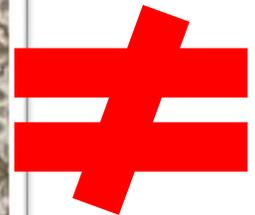
The way
it is



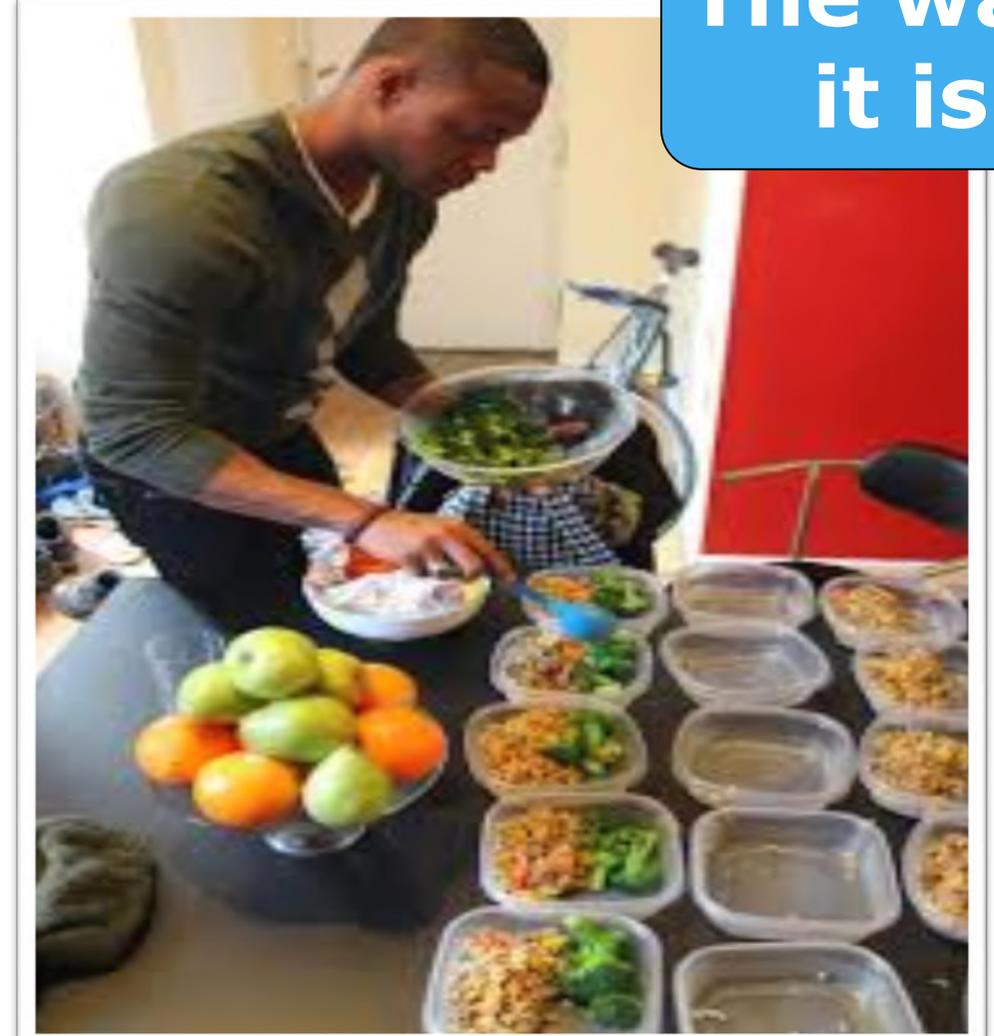
The changing home environment



The way
it was



The way
it is





The new influencers

21 Top Food Bloggers



The conscientious citizen

- 🌱 An educated consumer (food dudes schooling)
- 🌱 Environmentally aware
- 🌱 The role of natural
- 🌱 The rise of veganism
- 🌱 Always on



The rise of health hedonism and the health centric generation

Source: David Bebber for the Times

The always on world /smart tech



The way we live..our lives in flux



AVO-LUTION

London's biggest and most exciting pop-up
dedicated to all things avocado





The new Avocado..
Why figs are having a moment

Four interlocking factors in understanding snacking behaviour



1. The occasion

What day and time is it, and what's going on in their life more widely?

2. The person

What is their general outlook on healthy eating and snacking?

3. The motivation

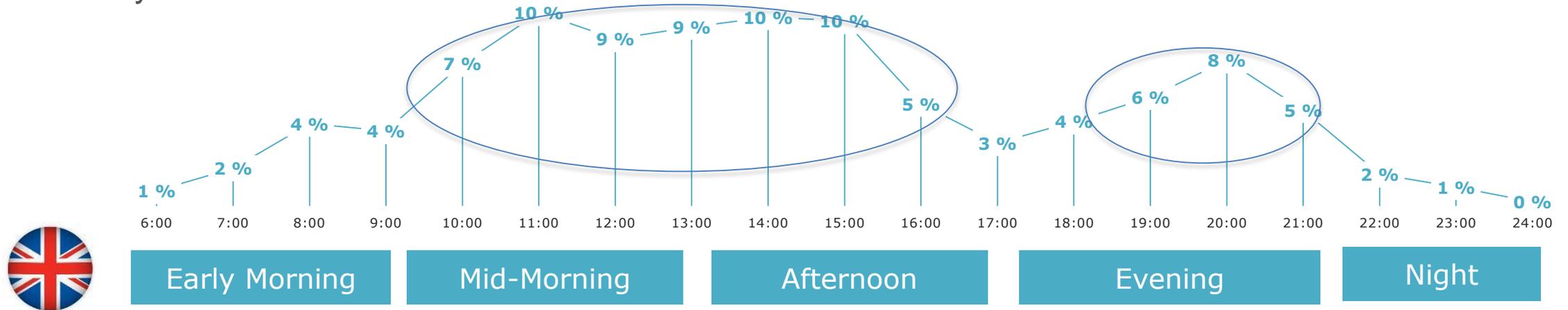
Are there specific reasons for having a snack at this time?

4. The snack type

Which types of snacks are under consideration or being consumed with everything else in mind?

3 in 5 snacks are eaten between mid-morning and afternoon

Time of day snacks eaten:



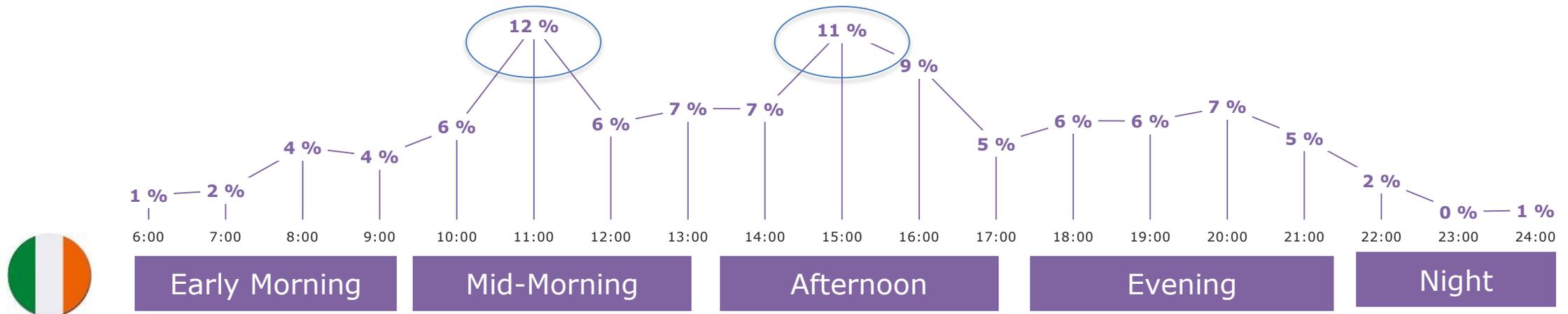
In addition to the main snacking period between mid-morning and afternoon, we also see another period between about 7pm and 9pm where another 19% of all snacking occasions fall

Base: UK Nat Rep n=1000



Classic 11am and 3pm snack times are very prominent in Ireland

Time of day snacks eaten:



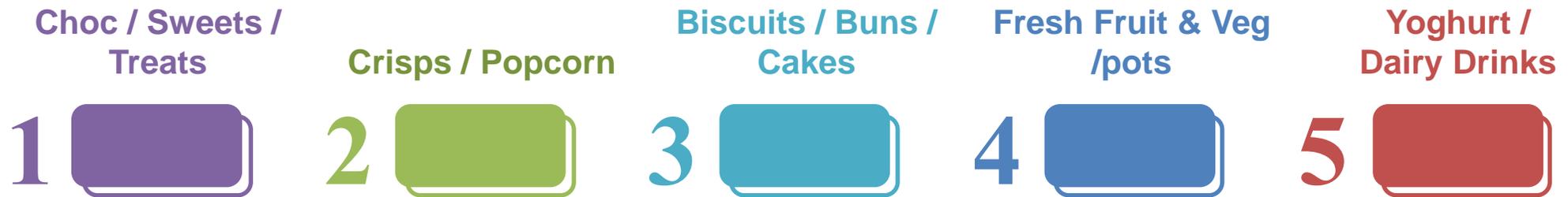
The broad daily pattern for snacking is similar in Ireland as per the UK, although we see more distinct peaks at 11am and 3pm. Again, we see a consistent period of evening snacking also.

Base: IRL Nat Rep n=1004



Across all occasions, unhealthy snacks dominate

The top five snack types are much the same across the day

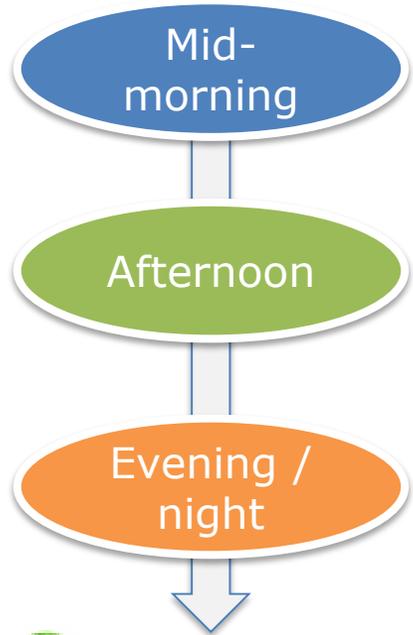


However, there are differences across the time of day based on types of snack and motivations

Base: UK Snackers Aged 18-54: n=1000



How do the occasions differ?



More likely ABC1
At work with others
Those who plan more

Higher for fresh fruit and veg, yoghurt, smoothies, granola, rice/corn cakes

Least about indulgence and comfort – more about basic nutrition. Healthiest time

People looking for recommendations

Higher for fresh fruit and veg, nuts and seeds, dried fruit and veg crisps

Getting an energy boost more prominent now – overcoming afternoon slump

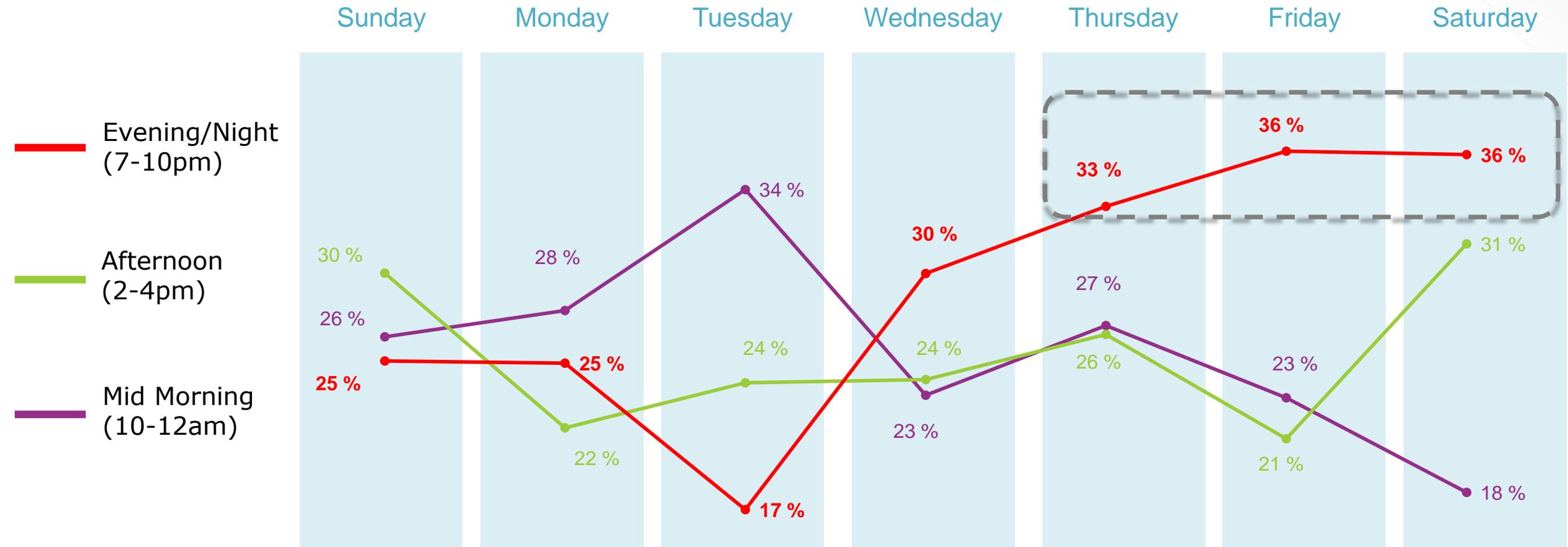
Good intentions but not as healthy and less routine
Up 45-54, down 25-34

More chocolate, sweets, treats, crisps, popcorn

Indulgence – feelgood, a treat. Not about fulfilment or being energised



Notable rise in evening/night snacking at the end of the week and the weekend



Base: UK Snackers Aged 18-54: n=1000





**The Twilight Zone is fraught with risk
(and opportunity...)**

"Sometimes I go to bed early just because I know if I stay downstairs I'll eat toast"

Most consumers are trying to eat more healthily



While there are varying levels of commitment, 8 in 10 of the general population in the UK are trying to eat healthily.



In Ireland, 9 in 10 say they are trying to eat healthily, with just 1 in 10 not eating without regard to health concerns.



Most consumers are trying to eat more healthily

	Disciplined	8%
	Trying hard	36%
	Good intentions	34%

Snack types eaten more than once a week (UK) – illustrates that large proportion of the population are eating healthy snacks

	Disciplined	Trying hard	Good intentions
Fresh fruit & veg and veg snacks /veg pots	46 %	46 %	29 %
Yoghurt / dairy drinks	29 %	28 %	19 %
Smoothies / Fresh fruit or veg juices	22 %	21 %	13 %
Nuts / seeds / trail mixes	29 %	17 %	10 %
Rice cakes /corn cakes	19 %	9 %	6 %
Granola / flapjacks	14 %	9 %	7 %
Dried fruit and veg crisps	14 %	11 %	5 %
Protein bars / balls	18 %	7 %	3 %
Meat snacks / jerky	10 %	5 %	4 %

The Credit / Debit system has become a way of living: it's all about working towards a reward! This recognises behaviours throughout the day and throughout the week that justify the type of foods we are entitled to eat.

BAD

GOOD

I'll cycle my exercise bike for an hour in front of *Eastenders*, so I can have wine...

Taste is king for all snacks

Key drivers of product choice

Taste

A hygiene factor – won't repurchase if don't like taste

"You want to like what you eat"

Ingredients

Front and centre – especially healthy snacks; call out key ingredients

"What's in it and what isn't in it"

Packaging

Must communicate taste as well as benefits – Eat with their eyes

"I can just tell that's good for me"

Value

Expect to pay more for healthy snacks

"Some prices are very high"

Brand

Less of a consideration due to proliferation of new brands

"You see new brands all the time"

Origin

Less likely to be questioned – In Ireland Irish a bonus but not essential

"To be honest I don't check"

While some products are perceived as expensive, taste appears to be a bigger purchase barrier than price when it comes to healthy snacks



I'd like to buy healthy snacks but they tend to be too expensive for me

% agree

All

Disciplined

Trying hard

Good intentions

50%

53%

47%

53%

I would eat healthier snack foods if they tasted better

% agree

All

Disciplined

Trying hard

Good intentions

64%

62%

61%

69%

Base: UK Snackers Aged 18-54: n=1000



Indulgence with a healthy halo

- The *Fulfil* effect is evidence of the success of building a product that serve both the *Indulgent* and *Surviving* motivations – tasty first and healthy second
- Applying the traditional rules of confectionery to a healthy snack has worked well





The Thinking House

BORD BIA INSIGHT CENTRE

Snacking UK and Ireland

How people shop

What they look for why and where

Where are people purchasing snacks?



Large Supermarkets

- By far the most common place to buy snacks
- Tend to be eaten at home
- Older cohort over indexing

Convenience Stores/ Express Supermarkets / Corner Shops

- Buying for snacks at work & on the go
- Mostly full time workers
- Their snacking has increased a lot (10%)
- Over indexing for impulse buying snacks

Health & Specialist Sports Stores

- Health enthusiasts (the disciplined)
- Clean & high protein more important to group
- Buying snacks for after exercise & sports
- Protein Bars/Balls, Meat Snacks & Rice/Corn Cakes bought too

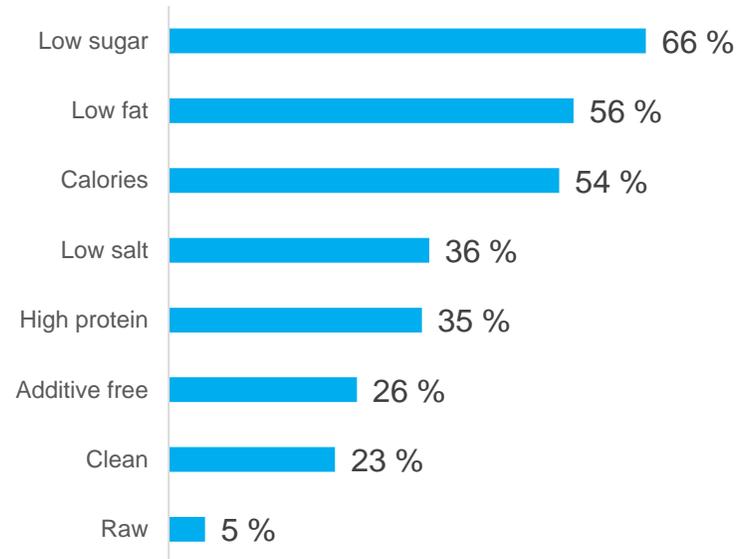
UK Total Sample n=1000, snack instances n=1913

Benefits are still across the basics of sugar, fat and calories: Reduce,remove,replace!

When choosing a snack for healthy benefits, which ones are of most importance to you?



Most important benefits



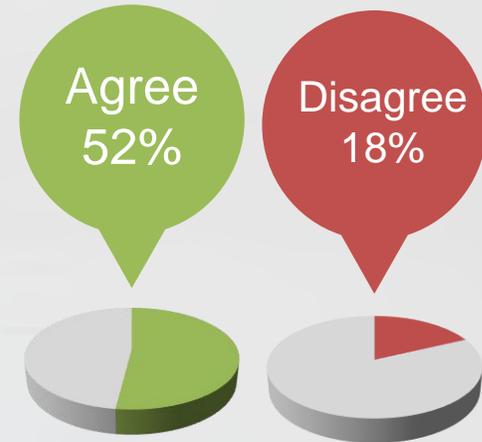
Note – for the disciplined group, the presence of protein becomes much more important and is equal top with low sugar

Base: UK Snackers Aged 18-54: n=1000



Packaging plays a critical role in determining whether a snack is perceived as healthy or not

“Before I even look at what a snack is, I can usually tell by the packaging if it is healthy or not”



A brand that's got packaging right - Graze

Window to show the food inside; increase appeal

Natural colours & images gives less processed cues

Health Benefit clearly identifiable & quantified e.g. 9g protein

Natural packaging type; cardboard & matt

Detailed flavour descriptor



What is healthy..?



**Sometimes its about presenting people with an alternative!!
Understanding the context of choice is important**



POS is one of the main places people get their information about snacks.

33% say they get product information here, which places greater importance on the role of packaging



Base: UK snackers aged 18-54 n=1,000

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Irish Food Board

Clarity of message is critical to eliminate confusion. The more health conscious people are the more help they need!

"It is essential to me that nutritional information is clearly displayed when I'm buying a healthy snack"

Agree
58%

Disagree
16%



Base: UK snackers aged 18-54 n=1,000

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Bord Bia
Irish Food Board

Health betrayal – health confusion!!

259cals/1088kJ



243cals/1020kJ



movingdietitian
Melbourne, Victoria, ... [Follow](#)

movingdietitian HEALTH FOOD AISLE FAIL

One of many examples of bars found in the health food section that are not so healthy. They contain

- ✗ Similar calories to a mars
- ✗ 5tsp worth of sugar!! Not as high as a mars at 9tsp but should be minimised all the same
- If it's protein you're after, you can eat 2 eggs instead 🍳
- 👉 This is important for anyone trying to cut some calories. Bars like this can be useful in some sporting situations where you need a quick intake of carbs

[View all 33 comments](#)

tylerjames1100 @movingdietitian exactly! Need the carbs to run well since ill be out there for hours

♡ 💬
223 likes
2 DAYS AGO

Healthy snacks, not always so healthy!
@movingdietitian, Melbourne Australia

Source: Instagram analysis and influencer website review



1 in 2 people want snacks they can split into portions

While people enjoy snacking and want to snack, 58% agree they are trying to limit their snacks (v 17% disagree). They want permission to snack, but to be able to do so in a controlled way

Agree
47%

Disagree
22%

"It is important to me that snacks are divided into suitable sizes"

Base: UK snackers aged 18-54 n=1,000



From challenge to resolution

EMERGING OPPORTUNITIES



Opportunity

#1

Serving the
reluctant
compromiser

RESOLUTION



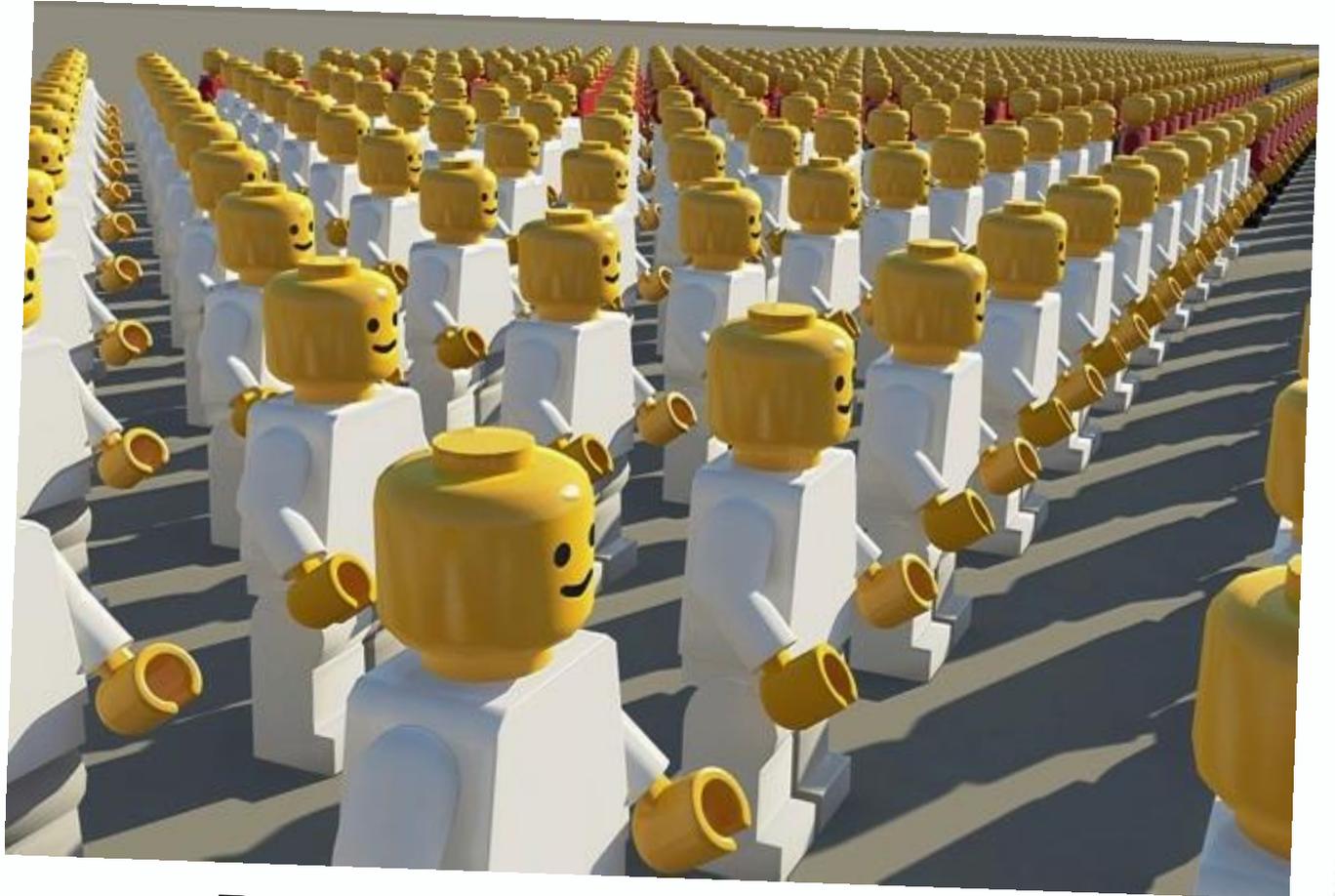
More options with taste!

Opportunity

#2

Introducing
them to the
new world

RESOLUTION



Democratising better choices

Opportunity

#3

**Supporting the
cynical and
confused!**

RESOLUTION

- 1. Be authentic**
- 2. Use real ingredients**
- 3. Make it clear!**

Provide the cues...

Opportunity

#4

Facilitate
identity
badging

RESOLUTION



Creating relevance

Opportunity

#5

Tick-tock
with the
body clock

RESOLUTION



Create a portfolio of solutions

Opportunity

#6

Grant
permissible
indulgences

RESOLUTION



Address the moments of risk

Opportunity

#7

Find the
perfect
partners

RESOLUTION



What's the new milk & cookies?

Opportunity

#8

Chunk it down!

RESOLUTION



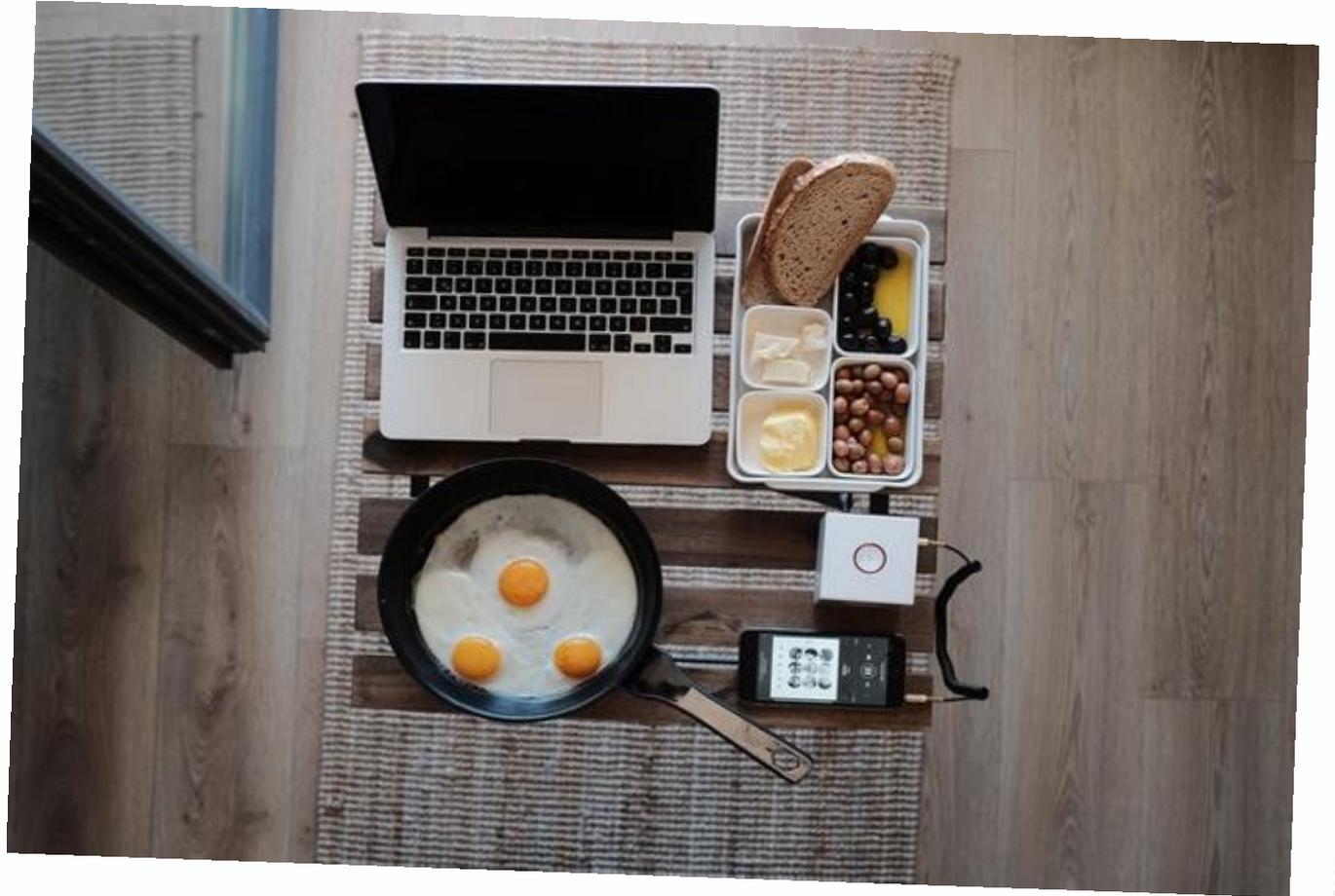
New sizes

Opportunity

#9

Chunk it up!

RESOLUTION



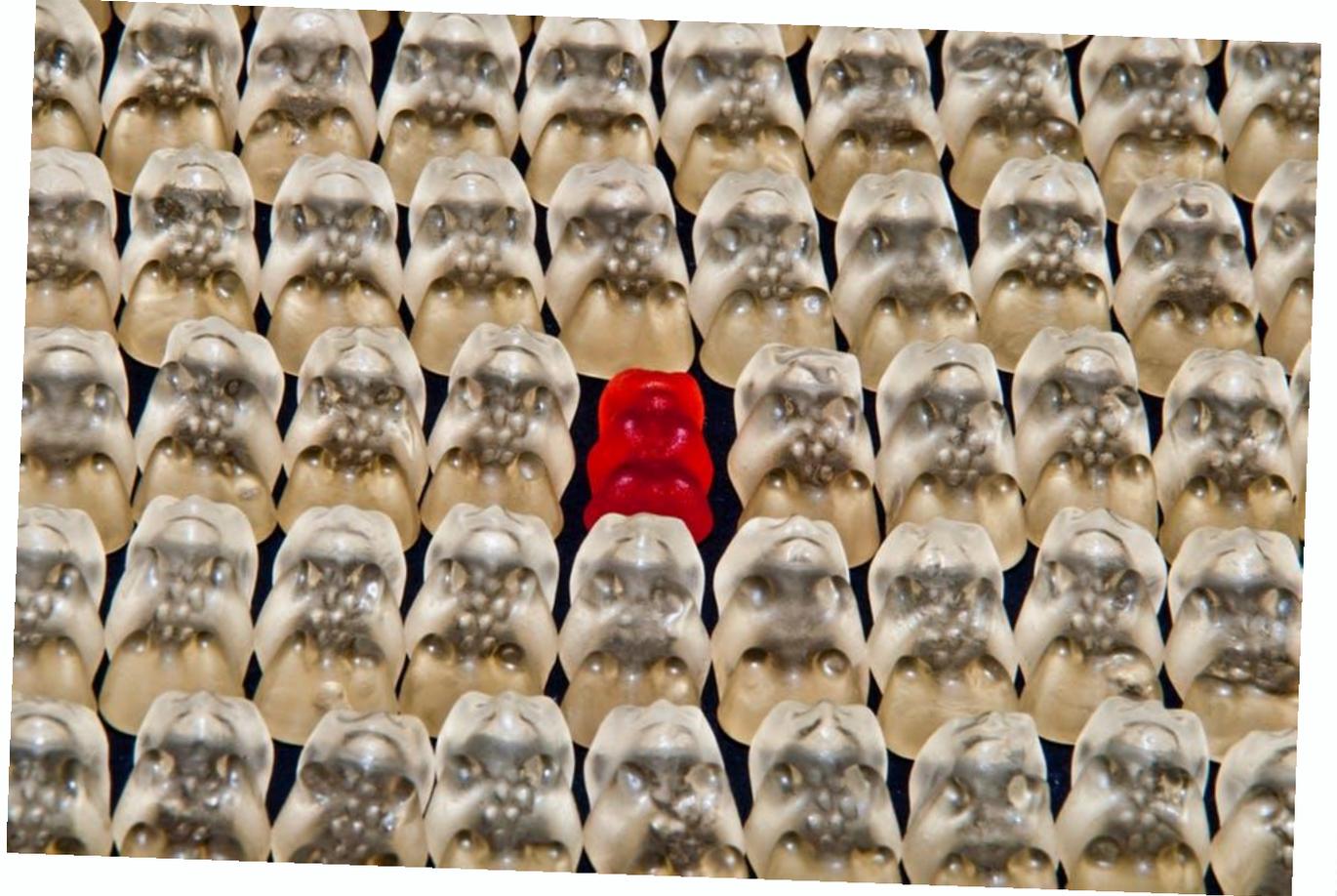
New sizes

Opportunity

#10

Accessible
aesthetics

RESOLUTION



Codes of colour

Opportunity

#11

Democratising
health

RESOLUTION



Create better value



The Thinking House

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END

GO RAIBH MAITH AGAT