The Thinking House

BORD BIA INSIGHT CENTRE



Understanding consumer awareness of Irish eating apples

8th December 2016

Agenda

- **Background**
- Key finding
- Consumer trends
- Apple behaviour
- The meaning of quality
- Awareness & perceptions of Irish grown
- Communications
- Recommendations

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Objectives



1. To understand the consumer awareness & perpceptions of Irish grown eating apples

2. To explore how we could position Irish grown eating apples as a premium option within the category

Methodology

Groundwork

Desk Research,
Stakeholder Calls,
*In-store review**

To provide a background understanding & identify the challenges that exist within the category

Quantitative

Online Survey
1000 respondents
Nat. Representative

To quantify levels of consumer awareness & purchase behaviours for apples

Qualitative

Online Community
7 Days
14 Respondents

To gain a deeper understanding of behaviour & perceptions of Irish eating apples

**Tesco, Dunnes Stores, SV, Lidl, Aldi*

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Who did we speak to?

Quantitative

- Nationally Representative survey covering 1000 Irish adults aged 18+.
- Quotas were set on age, gender, social class & region to ensure that the sample was representative of the national population

Qualitative

Age	Lifestage	Sex	Location
25-34	Pre-Family	Mixed	Dublin/Cork
35-44	Family	Mixed	Dublin/Cork
45-54	Older Family	Mixed	Dublin/Cork



Who did we speak to?

Qualitative

Criteria 1
Regular purchasers of apples (once a week)

Criteria 2
Agree with; *Supermarkets should offer more Irish sourced veg & fruit*

Criteria 3
All to have trialled Pink Lady apples

Criteria 4
Aware of at least 1 of the following varieties;

- Braeburn
- Cox
- Discovery
- Elstar
- Jonagold
- Katy (Katja)



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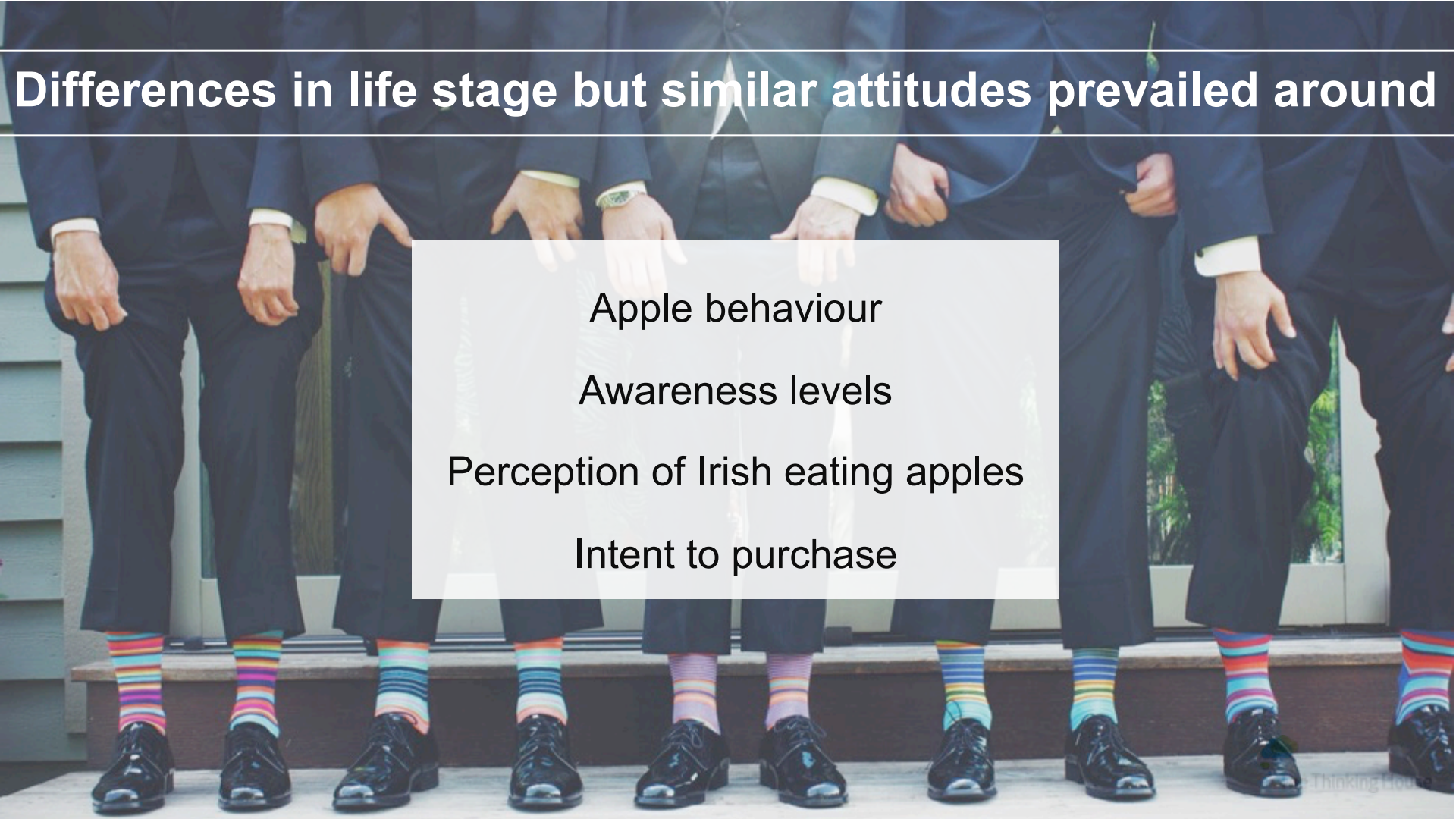
Differences in life stage but similar attitudes prevailed around



Apple behaviour

Awareness levels

Perception of Irish eating apples

Intent to purchase

Key finding

Consumer awareness of Irish grown apples is **very low**...

However, there is a **desire** for a greater emphasis of origin.

Quality is more important than price & consumers aspire to **support** a **premium** Irish eating apple

But they need help in education & in-store merchandising

Key finding

The key insight for the project was summed up by one of the respondents, Donal…

Having apples produced in Ireland should be encouraged, as we are not only less dependent on imports but have a better quality product. The origin of the fruit is not always made clear, so consumers don't always know that they can make a choice

Donal, Age 48

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Health & Wellbeing



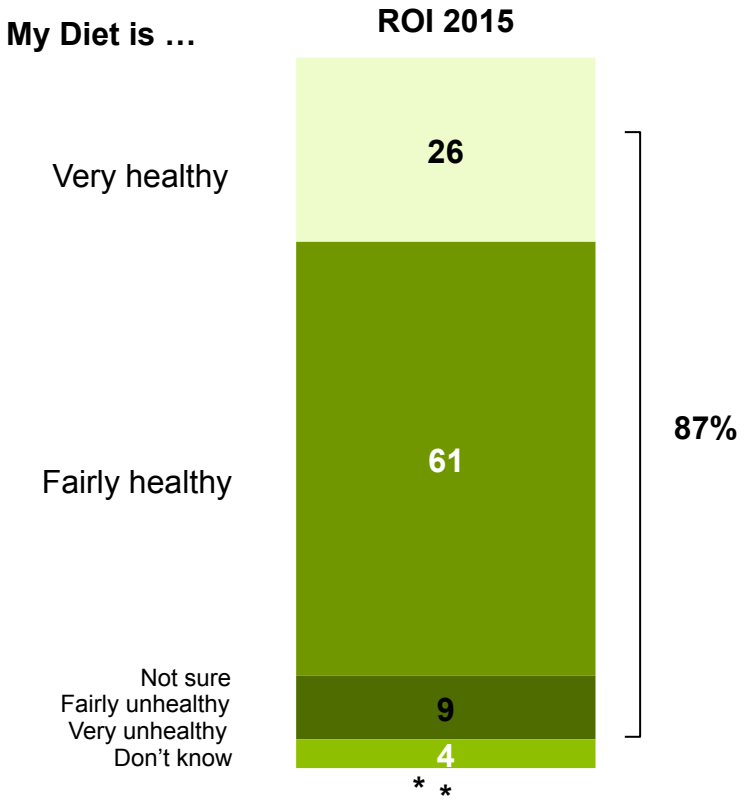
To deal with their maxed-out lives, today's consumer has fully embraced a more holistic approach to looking after their well-being. Paying attention to all facets of health has become a symbol of status.

Food & drink remain key health and wellness strategies. Consumers continue to watch out for "nasties" and scrutinise what goes into their mouths.

"Natural" is an ever important shortcut for "good for me". People are increasingly embracing the concept of purity to guide their nutritional & lifestyle choices, rediscovering simple, clean, wholesome components & processes that give energy to the body and balance the mind.

Parents are also ever more focused on what constitutes good nutrition for their children. Beyond simply feeding their children healthily, adults desire greater education in food and healthy cooking, to ensure that good habits continue into later life.

Diet perceptions



This drive towards health & wellness is highlighted in the chart to the left. Irish adults continue to position themselves as healthy, with 87% of Irish adults claiming their diet is very or fairly healthy. This figure has been consistently rising since 2003.

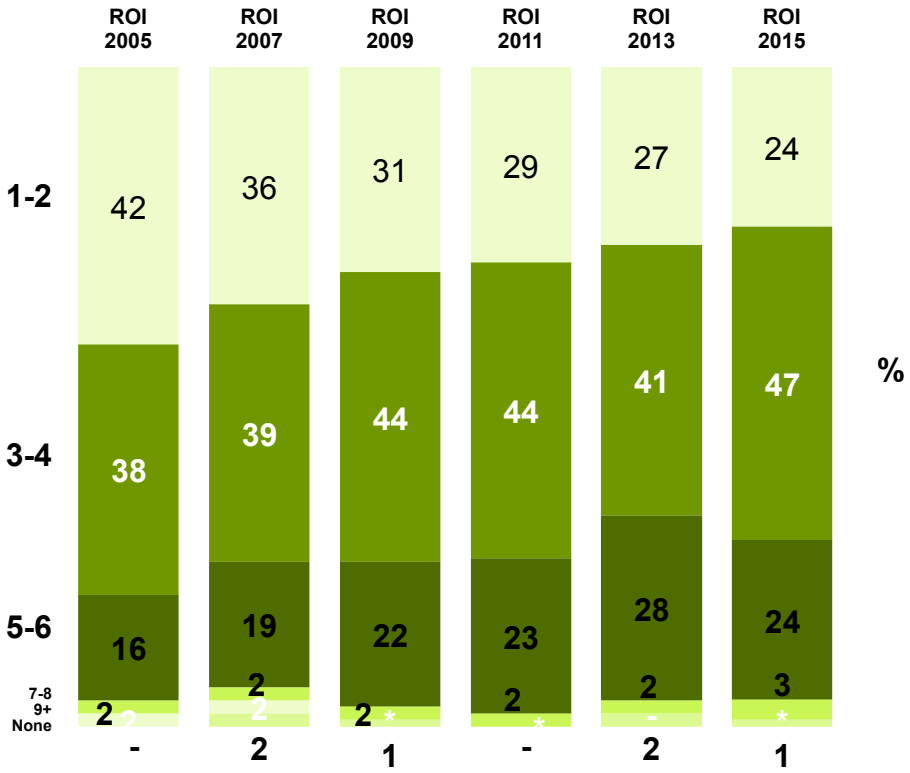
Over a quarter of adults believe that their diet has become more healthy in the past 12 months. In ROI this is led by females aged 25-34 years old.

Whilst actual behaviour might not reflect their own aspirational positioning, it highlights the fact that there is a strong desire to lead a healthier lifestyle.

Source; PERIscope 2015

Fruit & Veg consumption

Qs. On average, how many portions of fruit and vegetables do you eat everyday?



With health as a top of mind consideration, consumers are more conscious of their intake of healthy or natural foods.

Over the last few years we have seen a decrease in the number of people who state that they consume just 1-2 portions of fruit & vegetables each day.

This is due to the increase in those who report that they are now eating 3-4 portions per day. There has been a shift in the increase of fruit & vegetable consumption as consumers become more conscious about their diet.

Source; PERIscope 2015

Keeping it Real



Real products made from real ingredients by real people are increasingly important anchors for consumers in our ever more digitalised, intangible and shifting world.

Simple & traditional ingredients and production processes are playing an increasingly important role in reassuring and grounding consumers.

At the same time, trust in food and drink brands continues to be compromised by product safety scandals. Searching for products with total transparency about origins & ingredients has become an ever more important consumer coping strategy, no longer a desire, but a necessity.

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Keeping it Real

Naturally authentic

Desire for products that are 'as nature intended'



Consumers want products that are holistically natural & authentic. This means having nothing added (no chemicals, additives or preservatives) and being as far as possible in it's natural state (e.g. seasonal ingredients & products).

Genuine provenance

Provenance becoming the ultimate marker of quality



Provenance has evolved from being an area of interest to consumers, to one of the key markets of quality & trust. People expect brands to be totally transparent about where products are made; the place of production should then demonstrate its role in creating an excellent quality product.

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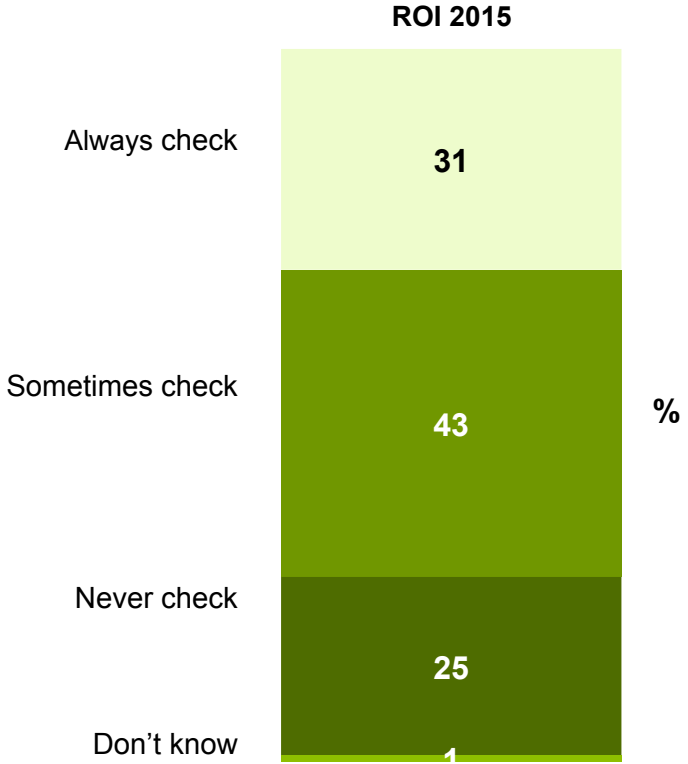
Origin labels

Qs. What extent do you check for country of origin, i.e. what country the food was produced in?



When it comes to checking the origin of our food, 1 in 3 consumers always check for a label which will tell them the country of origin.

Almost half of consumers report that they sometimes check with only a quarter claiming that they never check.

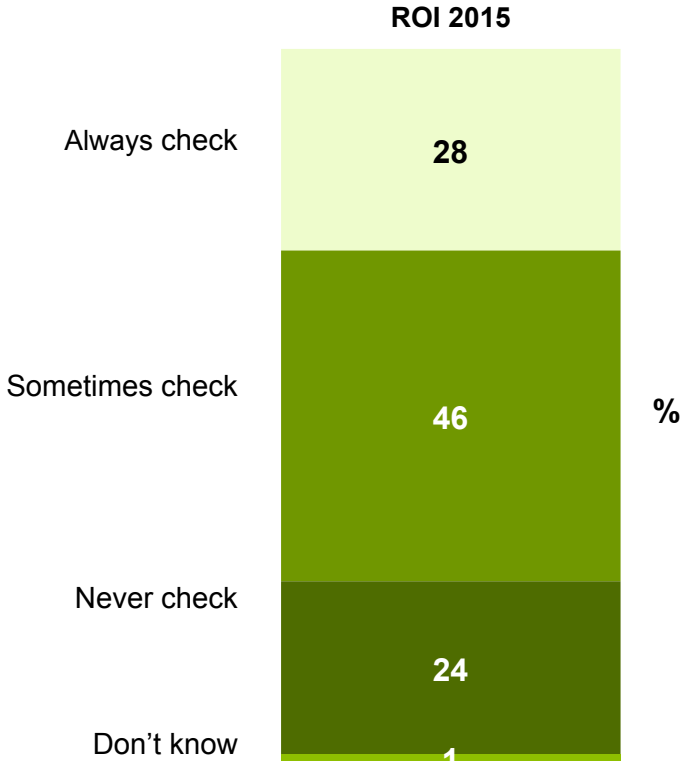
The importance of Origin can differ by category but it can be top of mind within primary produce categories such as meat, fruit & vegetables.

Consumers are more concerned with where their food is coming from and the transparency around origin.

Source; PERIscope 2015

Quality Labels

Qs. What extent do you check for a symbol or certificate that guarantees the quality of the produce?



When it comes to checking the for quality labels, just under 1 in 3 consumers report that they always check. Similar to checking origin, just under half of consumers sometimes check for quality labels.

Since origin can be a by-word for quality, the behaviour of checking for these labels can often go hand in hand.

Today there a number of different types of markers of origin however the leading marque is the Bord Bia Quality Mark which is found on primary produce.

Quality is important today as consumers are more careful as to how they spend their euro.

Source; PERIscope 2015

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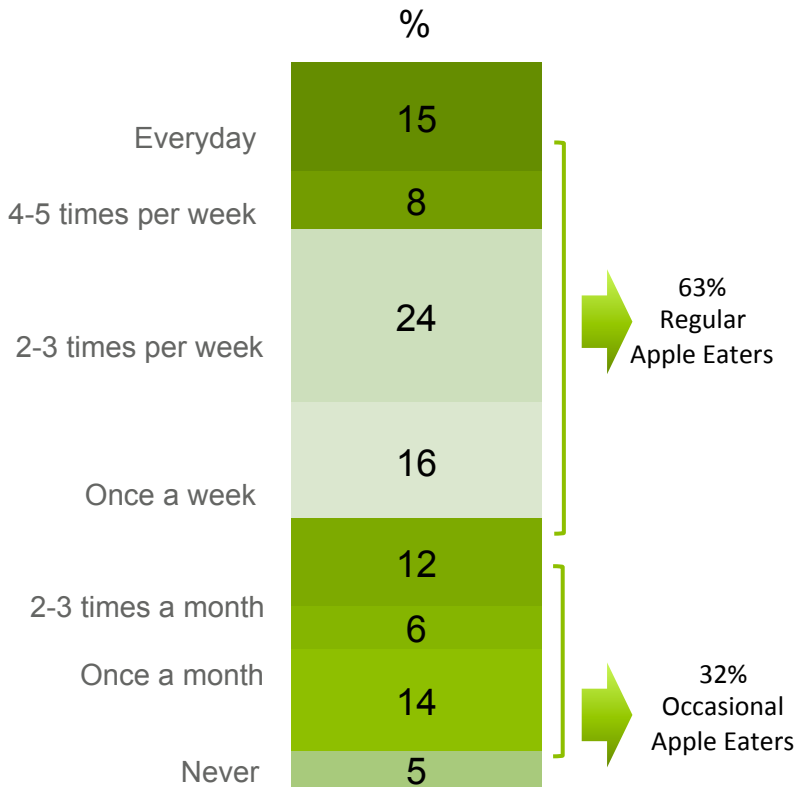
Frequency of eating apples



95% of all adults claim to eat apples.

The average annual consumption is **126** apples.

Those who eat apples can be segmented into **regular** eaters (those who eat at least one a week) & **occasional** eaters (those who eat once or 2-3 times a month).

Regular eaters represent **63%** of the population, whilst **1 in 3** are occasional eaters.

Source; Quantitative Omnibus Nov 16

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Who is eating apples?

%	Total	Gender		Age					Region			
	Total	Male	Female	18-24	25-34	35-44	45-55	55+	Dublin	RoL	Mun	Con/ Uls
Everyday	15%	13%	17%	10%	14%	17%	13%	18%	16%	15%	14%	15%
4-5 times per week	8%	9%	7%	2%	10%	10%	9%	7%	6%	10%	11%	4%
2-3 times per week	24%	25%	24%	24%	27%	23%	25%	22%	24%	19%	29%	25%
Once a week	16%	18%	15%	20%	16%	17%	14%	15%	16%	14%	16%	21%
2-3 times a month	12%	12%	12%	13%	11%	11%	14%	12%	15%	14%	11%	5%
Once a month	6%	7%	5%	8%	5%	4%	6%	7%	7%	6%	3%	8%
Less often	14%	12%	14%	19%	9%	13%	14%	14%	11%	14%	12%	16%
Never	5%	4%	6%	4%	8%	5%	5%	5%	5%	8%	4%	4%
Regular Eaters	**63%**	**65%**	**63%**	**65%**	**67%**	**67%**	**61%**	**62%**	**62%**	**58%**	**70%**	**64%**
Occasional Eaters	**32%**	**31%**	**31%**	**31%**	**25%**	**28%**	**34%**	**33%**	**33%**	**34%**	**26%**	**32%**
Average Consumption p.a.	**126**	**121**	**131**	**91**	**134**	**137**	**119**	**131**	**125**	**127**	**131**	**117**

Source; Quantitative Omnibus Nov 16

Who is eating apples?

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Less often	14%	12%	14%	19%	9%	13%	14%	14%	11%	14%	12%	16%
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Average Consumption p.a.	126	121	131	91	134	137	119	131	125	127	131	117

Source; Quantitative Omnibus Nov 16

Females aged **25-44** living in Munster consume the most often, at **136** apples per annum. These are our *regular* eaters.

Our *occasional* eaters are those adults aged **45-55+** who are living in Leinster.

18-24 year olds consume the least amount per year, at **91** apples.

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Associations by types

As we will come to see, the majority of consumers differentiate apples based on their colour as opposed to variety. Red & Green apples are how the consumer views the category.



- Symbolises bitter
- Tart/ Sour
- Crisp
- Crunchy
- Juicy
- Waxy Skin
- Look Fresher



- Sweeter
- Softer
- Juicy

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Purchase behaviour

For most, apples are typically purchased **once a week** as part of a shop. Incidences of purchasing loose apples are more aligned to the consumer being on the go or intending to consume there and then.

Consumers are purchasing one pack, be it a bag or a tray of apples as they know that they will **never eat more than one apple a day**.

Bagged apples are expected to contain 6-8 apples whereas trays (cardboard with a plastic wrapper) typically house 4 apples. The **trays are the preferred packaging format** as they infer better quality apples. The apples themselves are perceived to be in better condition.

Key varieties purchased include Pink Lady & Granny Smith.



Why are they purchasing?

Convenience	Apples are portable, perfect for the handbag & robust. They don't require any preparation, are easy to eat on the go, easy for children to eat without assistance.
Occasion	Apples serve as a great snack for lunch & lunchboxes, 3pm slump, after school, pre/post exercise and for journeys in the car. Apples are also used for cooking.
Health	"An apple a day keeps the doctor away". Consumers understand apples to be good for you in terms of hydration and delivering nutrition via vitamins & minerals.
Taste	There are a variety of tastes and levels of acidity but the common factor is that they are refreshing.
Shelf Life	An important benefit to apples is that they last a long time. Unlike soft fruit they will last the week and can last even longer if refrigerated.
Price	For the most part, apples are understood to be inexpensive particularly when you consider the benefits above.

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Price for bag/tray

Private Label		
<€1.80	€2	€2.99

The price of apples can vary within the category depending on whether they are a retailers own brand or else a branded apple such as the Pink Lady.

Consumers report that they don't tend to check the price too often since apples are known to be **good value** i.e. they are cheap for how far a bag would go.

Consumers report that they have stopped buying cheaper apples or those from discounters and instead have **traded up** to the more expensive apples.

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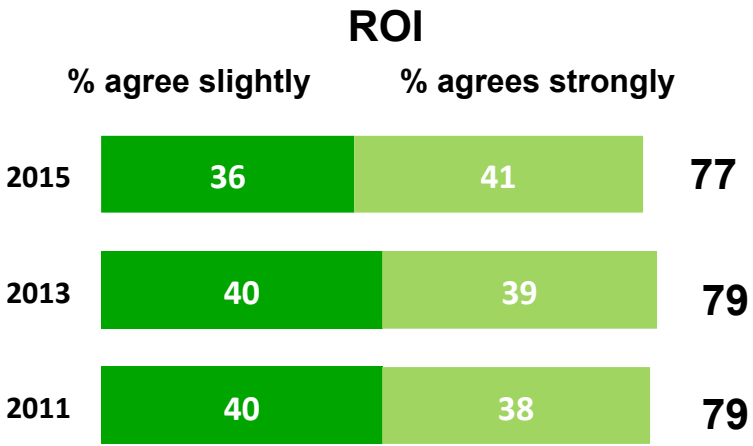
Quality

Quality of fresh food is more important than price



When it comes to fresh produce we can look at general consumer sentiment in terms of the importance that they place on quality versus price.

We can see that the quality of fresh produce becomes more important that price for three quarters of consumers.

This means that consumers are willing to spend a bit more on something which has proven itself to be of good quality.

Source; PERIscope 2015

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Quality- Channel Perceptions

Consumers believe that the quality of fresh fruit can vary by distribution channel, even though this may not be the case.

The ultimate beacon of quality reflects market stalls at farmers markets and also greengrocers. The perception that fruit purchased here is the freshest, in-season, quality produce. This belief also reflects our *Keeping it Real* trend as a greengrocer/farmers market is much closer to the land than a main retailer. A more personal, human element exists and one that has a more vested interest in the provenance and production of the produce.

For the main retailers, quality does not appear consistent. It can vary by store or by time of the week that a consumer visits. Quality within the main retail environment is comprised of some key indicators; Freshness, Variety, Display & Origin.

Quality – Retailer Perceptions

Supervalu is perceived as having the best fruit displays, evoking natural and almost greencrogcer like displays (MOPI stores). They are also perceived as being the best for Irish produce.



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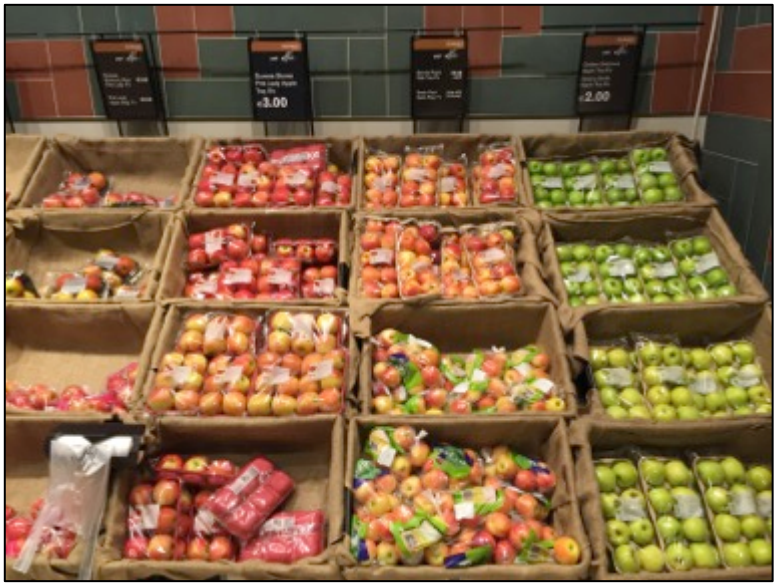
Quality – Retailer Perceptions

Dunnes Stores also perform well on perceived Origin and supply of Irish. They are less consistent in terms of good displays, variety and freshness of fruit. These seem to differ by store but the one constant is that they have good promotions or offers.





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Quality – Retailer Perceptions

Tesco performs well in the off-season as consumers believe that the consistency of their fruit remains the same year round. They are understood to have a good variety of fruit which is clearly displayed in store.





Quality – Retailer Perceptions

The discounters are unanimously understood to have the best prices within retail for fruit, however they suffer on the consumer belief that their fruit goes off quicker & that they have unattractive fruit displays.



ALDI



LIDL

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Quality – Class System

Earlier, we talked about the consumer trend of checking for labels of quality on products. The ultimate marker is the Bord Bia Quality Label within primary produce, others include the likes of Great Taste award labels, Guaranteed Irish & National Dairy Council.

Within fruit, there is some awareness of the Class System. Consumers do notice this on pack and understand it to be a marker of the quality of the fruit. They are unfamiliar with the finer details but it is sufficient enough for them to determine that a piece of fruit with a Class 1 marking, is the best quality produce from the original supply.

Whilst this label is known, it is not checked each time fruit is purchased. Instead the sell/use by date is the go to piece of information to help determine quality along with the visual appearance of the fruit.

Quality – Shelf life

The shelf life of an apple can also be an indicator or navigator of quality for the consumer.

As mentioned, those consumers who report that they have stopped buying cheaper apples, have done so because they tend to go off very quickly after purchase. This is a trait which consumers associate with the discounters. The shelf life of apples is a purchase consideration and consumers need to know that their fruit will be lasting the week, particularly as they won't eat more than an apple a day.

I know the prices are cheaper in other supermarkets but I prefer the quality of fruit that I buy in Dunnes or from the greengrocers. The fruit from the discounters seems to go off very quickly.

Triona, 39

Quality - Taste

As with any foods, taste is a key driver of purchase for consumers and one that is very subjective. Within apples, there is a general consensus that the more expensive apples are more tasty.

The Pink Lady is the ultimate tasty apple and one which as an accompanying premium price tag. However, consumers are willing to spend that little bit extra on a great tasting apple.

Mums also are willing to spend more for products that they know their family will eat. They will spend extra on tasty apples as they know that they will get eaten whereas cheaper apples can sometimes get thrown in the bin.

If I buy cheaper apples they end up in the bin as they go off and aren't eaten

Joan, 46

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Taste Attributes

So, what do consumers want from an apple, what is most important to them?

1. Juicy
2. Crispy
3. Firm
4. Crunch



It's all about the sweet juice and the bite for consumers. Texture is very important for all, this includes children too. Mums report that their children prefer the softer bite to a red apple and are therefore willing to spend a little extra to ensure that they are eaten. A thinner skin is preferred to as it reflects a nicer bite.

What consumers don't really want to hear is mentions of acidity or sharpness. This starts to remind them of green or cooking apples.

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The Pink Lady



So, the Pink Lady is the favourite within the category…

An apple that would satisfy you without fail

Johnathon, 37

The apple itself looks fresh and appealing. The red and yellow tinge to the skin gives it a pink blush or rosy colour. Whilst colour is low down on the key attributes sought (as it's all about taste) the appearance still looks inviting.

The taste of the apple is full of flavour since it is sweet and juicy, matching those attributes sought by consumers. It's the juice that gives a feeling of refreshment. A firm and crunchy texture provides a good bite to the apple but one that is not too hard. Consistency is key.

I've never had a bad experience with a Pink Lady apple. It's consistent, you know what you are getting.

Elaine, 29

Understanding of Premium

Whilst consumers are aware of the price differences within the market, the price tag doesn't appear to have a significant impact on purchase decision for those that we spoke to.

They clearly define Pink Lady as being the most premium priced apple in the market but also know that they can pick up a bag of red apples for €1+ cheaper. The Pink Lady is the best in class for quality & taste and serves as the benchmark for premium.

Loyalty to the Pink Lady is strong since the delivery of it's quality is consistent & available year round.

I have no problem going for the more expensive apples i.e. Pink Ladies because compared to other cheaper apples, they wouldn't have the same tasty, juicy, crunchy flavour to them

Johnathon, 37

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Perception of Local

Almost 7 in 10 ROI adults believe that buying local is important and claim to purchase locally produced food at least once a week. The vast majority believe that the term “local food” refers to food made within a close proximity to where they live and 1 in 5 think it is food within their respective countries.

There is a strong understanding and a positive attitude towards local food, with over 7 in 10 believing local food to be of higher quality, contain less preservatives/artificial ingredients and that it is better for their health. This is important within apples due to the expectation of preservatives and pesticides used on imported apples to ensure that they have a longer shelf life for the food miles that they are covering. **Irish eating apples are perceived to be more natural & better for you as a result**.

	% Agree slightly/strongly
Food produced locally results in higher quality products	**75%**
I like to know the area where my food comes from	**71%**
I think food produced locally has less preservatives and artificial ingredients	**68%**
I feel food produced in my local area is better for my health	**68%**

Source; PERIscope 2015

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Importance of Origin for fruit

It is important to revisit what origin can mean for fruit & apples, before we understand Irish eating apples.

Foreign & imported fruits are expected to have been sprayed with chemicals & pesticides to ensure that they maintain their consistency during transport. Consumers believe that our production is more natural and doesn't use harmful pesticides and chemicals.

Local or Irish fruits are deemed to be **fresher** because they spend less time in storage on account of the small distance that they travel.

Consumer's feel that there should be clear indicators of Origin for fruit. For packed fruit these are understood to be displayed on the pack whereas for loose, a consumer would expect to find the origin on the shelf price label.

Origin for fruit does matter. I try to buy Irish as it's better quality & hasn't been in cold storage for months

Joan, 46

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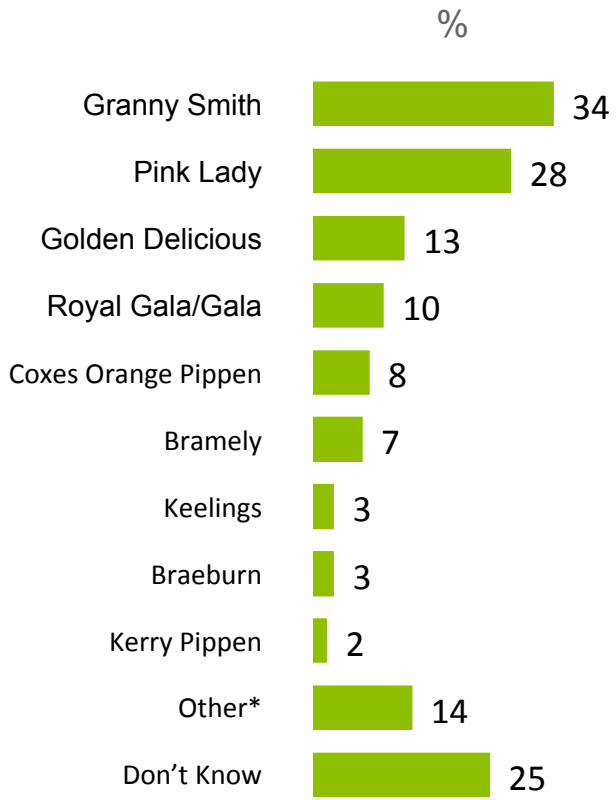
Spontaneous Awareness of apple varieties



Within our quantiative study we asked consumers to spontaneously name any varieties of Irish eating apples that they were aware of.

1 in 3 cited Granny Smith as an Irish apple variety/brand that they were aware of. Pink Lady was the next top of mind apple/brand.

1 in 4 consumers struggled to recall any apple variety or brand.

This highlights the extremely low awareness that apples have in general, as the majority of consumers do not pay attention to variety or brand in most instances. Instead they appear to distinguish according to colour preference; red or green.

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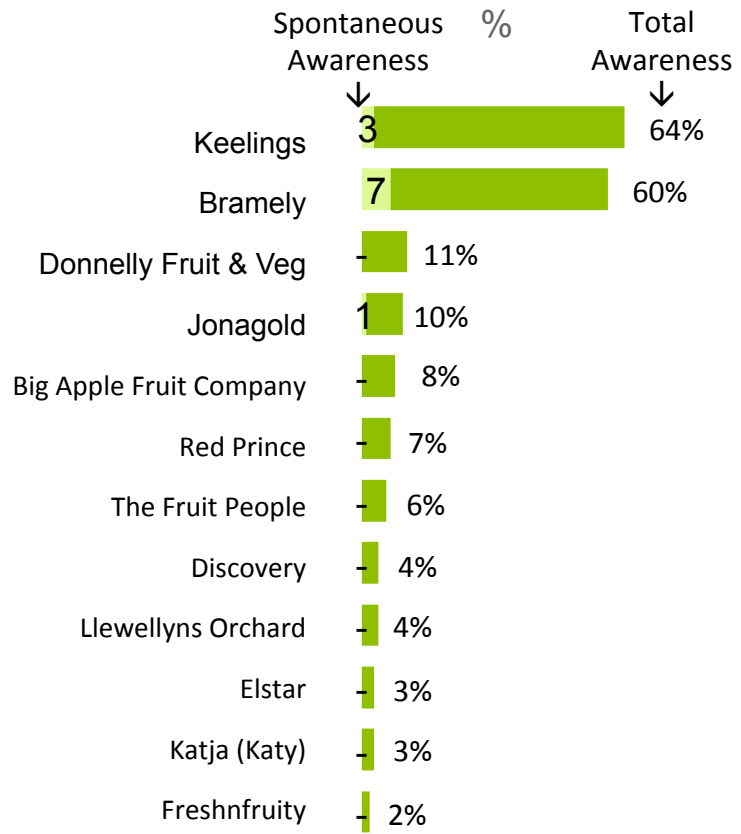
Source; Quantitative Omnibus Nov 16

Prompted awareness of apple varieties



Source; Quantitative Omnibus Nov 16

Having understood if any varieties/brands are top of mind, we showed consumers a list of brands & varieties to see if they had heard of any of them. By prompting them we would hope to jog their memory as to ones that they have seen or heard of before.

However, even prompting them with a list of options, awareness remained very low.

Almost half of consumers, **46%** to be exact, had not heard of any of these varieties or brands. Keelings & Bramley were the most salient once prompted to consumers.

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Irishness within the retail environement



As mentioned earlier, perceptions of quality can vary by retailer. Perceptions also varied according to the supply of Irish produce and commitment to origin.

As we know, consumers typically shop on auto-pilot, looking out for those familiar brands/products that they habitually buy. Whilst reports of checking for origin labels are high, it can edge towards "sometimes checking" within the fruit category.

The alarming finding here is that some consumers can assume the produce is Irish because of the type of store that they are in. This is more relevant to Dunnes Stores & Supervalu as consumers believe they are the best at doing Irish produce since they are Irish companies.

I believed that brands such as Dunnes Stores or Keelings were Irish brands. I thought I was buying Irish products.

Triona, 39

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And some consumers have nearly been caught out by additional communications on pack that they believed to be an indicator of origin;

You have to be careful with Aldi as they put a sticker on their fruit of Irish Rugby. On first glance you think it's a statement of origin…but it's not

Jacqualine, 47

The trust placed in the retailer means that less attention is paid to origin. However, this does not help when we explore the availability & displays of Irish eating apples…

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In-store availability

One of the main contributors to the lack of awareness of Irish eating apples and even the knowledge that they are available, is the inconsistency of supply within the retail environment.

Some retailers stock Irish eating apples, however this can even differ by branch. On the other hand some retailers or locations don't appear to stock any at all. Lidl had no Irish eating apples for sale nor did two of the Tesco stores that we visited.

This was echoed by one of our consumers during the purchase task (whereby they were asked to go out and pick up some Irish eating apples ahead of tasting).

I went to two stores and they didn't have any Irish apples

Nicky, 28

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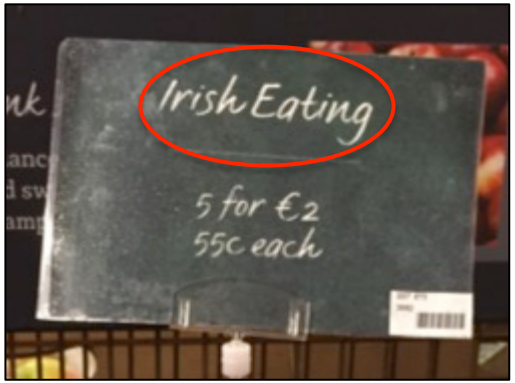
In-store Merchandising

There is very little or no emphasis by retailers placed on Irish eating apples in-store. We found a severe lack of in-store signage highlighting Irish eating apples with the communication of origin left to the pack label or the shelf price label.

One of our consumers during the purchase task stated, "*that it was hard to find them (Irish apples*)".

Dunnes Stores (Rathmines) and Supervalu (Blackrock) were the only retailers from our visits that had a clear sign indicating that some of their apples were Irish. The origin was also clearly displayed on pack.





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Origin on pack

The communication of origin for Aldi was left to the packaging and for their eating apples, the communication was clear. Dunnes stores also had origin clearly displayed on their packaging.













DUNNES STORES

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Northern Irish apples

Whilst Tesco & Lidl didn't have any Irish eating apples within the stores that we visited, they did have apples from Northern Ireland.

However, the origin on the Tesco label stated N.I whilst the shelf price label stated them as being "Irish". On first glance a consumer could assume that they are buying apples from the Republic of Ireland particularly in that 1.5 second window that a consumer has to make their decision.

To some this would appear misleading depending on the consumer definition of Irish. When we think about the trust placed in the retailer to commitment to Irish we would expect them to be transparent in their communication.





Expectations of Irish

Before we tasked consumers with purchasing Irish eating apples, we asked them what they would expect from them;

Taste	A flavoursome sweet apple that is juicy, crunchy & crisp
Visual	Vibrant in colour
Price	More expensive than others because it is Irish (premium association with local products) but on the other hand it has travelled much less than an imported so this should be reflected in the price
Availability	Seasonally available (Autumn) but should be available in all retail. Consumers question if there are there supply/stock issues due to their lack of availability

Actual Taste

The two types of Irish eating apples that consumers found as part of their purchase task, were Elstar & Jonagold. Consumers hadn't heard of these names before and found them unusual in the sense that they **didn't sound Irish**. This means that they have to work harder in communicating origin via other means.

The apples themselves were deemed to be juicy, crispy and crunchy.

Thinking back to the key taste cues that consumers look for from a quality apple, the Irish eating apples that they tasted, delivered on this criteria;

1. Juicy
2. Crispy
3. Firm
4. Crunch

However, taste is always subjective so differences in opinion are common…

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Vs. Pink Lady



For some, the actual taste was very similar to Pink Lady (juicy, crispy, crunchy) but for others, they preferred the Pink Lady.

The main reason here was according to sharpness or acidity of the Irish eating apple. Some consumers enjoyed their perceived tartness of their Irish eating apple, whilst others did not, with some describing as bitter.

> *I preferred the Irish apple as it was more crunchy & acidic*
>
> *Elaine 29*

A tarter, more acidic taste profile is to be assumed as less suitable for children, who prefer sweeter tastes. Therefore, an Irish eating apple with medium acidity may be better positioned towards adults for a more complex flavour than the Pink Lady.

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Other

Visually, the apples were reported as less uniform than imported apples and the skin was more matt than shiny. However, for some a less uniform or imperfect apple implies a more natural & healthier product.

I don't mind if apples don't all look the same. It seems more natural & healthier

Niamh, 39

The price was deemed to be on par with Pink Lady which would infer that it would also have similar attributes.

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Intent to purchase

There is a strong sentiment of likelihood to purchase by consumers (once they are aware).

Trial is key here as for most consumers, the taste & flavour is very positive. The desire comes once they the knowledge that these apples would be in season and as a result would deliver freshness and flavour.

I didn't expect them to be as flavoursome, I was very impressed. I would definitely be willing to purchase Irish apples in future

Elaine, 29

The flavour, bite & juiciness of the apple really appealed to me

Elaine, 29

Once aware, they have the choice to support local also & state that they will look more closely at origin.

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Intent to purchase

However, the taste can be a key barrier to some once tasted…

I really want to to buy Irish, however I did not like the taste of the (Irish) apple that I tried. Unfortunately this is the deciding factor for me.

Triona, 39

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Agenda

- Background
- Key finding
- Consumer trends
- Apple behaviour
- The meaning of quality
- Awareness of Irish grown
- Perception of Irish eating apples
- **Communications**
- Recommendations

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Campaigns

We asked our consumers if they could recall seeing a campaign advertising or promoting Irish eating apples, however no one could remember seeing one.

There were some mentions of campaigns by Keelings promoting their fruit and berries in particular but that was the extent of recall.

Strawberries were more so recalled due to their in-store promotions when in season and also the little stalls at the side of the road that pop up in season.

There is a lack of promotional or campaign messaging for the apple category which leads consumers to find their own ways of navigating the category. i.e. Trusting the origin of fruit based on the origin of the retailer.

In terms of what could be communicated about Irish eating apple production, we explored a number of messages so as to gauge appeal and relevance to the consumer…

Flavour

Irish eating apples are packed full of flavour. Their deep red blushed colour and thinner skin, make for a more enjoyable eating experience. Irish eating apples are fresh tasting due to a medium acidity level. They are firm with a good crunch when you bite into them but they remain very juicy

This description of flavour was put in front of consumers who all found it appealing. It was reflected their experience with the tasting task of an Irish eating apple.

I like the description as it is accurate, relating to the Irish apple I ate last night

Elaine, 29

It describes the apple exactly as I experienced eating it

Eoin, 35

The only element that they didn't enjoy being mentioned was the acidity.

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Acidity

The only element that they didn't enjoy being mentioned was the acidity.

We mentioned earlier that taste is subjective and the level of acidity can differ by consumer. The mention of the word acidity is enough to put some consumers off.

The word "acidity" turns me off

Niamh, 39

I would agree with the flavour statement, except for the acidity aspect which I would say is inaccruate

Jacquline, 47

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Seasonality

There is a lack of consumer understanding of the Irish eating apple growing season.

Consumers make assumptions based on our climate, in that the summer months are the warmest and therefore best for growing. They assume that the season lasts approx 4-6 months until autumn. Harvesting or picking is assumed to take place at the end of summer or mid to late autumn.

They have a clearer understanding of Irish strawberry season due to the prominence of the roadside carts and also the nostalgia of eating strawberries & cream in summer. They have no such association with Irish eating apples.

What appeals to consumers is the fresh message that comes from a seasonal product. Once they learn that the apples are typically picked and stored on the same day they understand that they are kept as fresh as possible without the use of chemicals.

Grower Investment

The main learning concerning the investment made by growers was in terms of the work put in.

Consumers aren't aware of the work that is needed to grow and harvest apples. They aren't aware of the investment put in and how that can affect the quality of the final produce. The man hours involved were a stand out indicator of the care and attention put in to deliver a quality apple. Detailing the land and thinning and pruning by hand validated the quality message.

I never realised the amount of work put into it (growing). I like the fact that there is a lot of care taken to produce the best quality apples.

Louise, 27

The monetary investment which is also involved in re-planting orchards isn't as motivating as the care & attention delivered by the man hours.

I like the time & care that is put into producing Irish apples. It almost gives me a sense of proudness of the quality Ireland produce.

Nicky, 28

Sustainability

Irish eating apples have a low carbon footprint and a minimal number of food miles compared to imported apples.

Consumers need reminding of the sustainability impact of locally produced food. It becomes less relevant within fruit compared to other categories because the consumer assumes that we don't grow much fruit here.

It's not really an issue but can understand the benefit to the environment of local

Elaine, 29

Apples with low food miles are deemed to be fresher, safer and healthier. There is a lower risk of bacteria or insects that may be brought in from another country.

I hadn't really thought of it, but now I will try to buy more homegrown food

Fintan, 33

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Awareness

The majority of consumers simply aren't aware of the availability of Irish eating apples, they don't know that they have a choice to make.

More needs to be done in terms of driving awareness of Irish eating apples. The most effective way to do so is to promote in-store via merchandising and signage.

Retailers need to place more emphasis on displays & signage which clearly indicate Irish origin.





Flavour

Trial is a critical element to the success of Irish eating apples.

Consumers use Pink Lady to benchmark a great tasting apple, however once they have trialled an Irish eating apple, they understand it to be on par and in some instances, superior.

Irish eating apples deliver on the core attributes that consumers seek from a great tasting apple. These should be communicated on pack or at the point of sale so as to educate the consumer.

It's all about the juiciness and the crunchy texture. Texture isn't often communicated & this provides an opportunity for a talking point. Mentions of acidity & sharpness should be avoided as these can be off-putting to some consumers.

1. Juicy
2. Crispy/
3. Firm
4. Crunch



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Quality

Quality is a key word for eating apples.

We need to start to talk to consumers about the various aspects that contribute to the quality of Irish eating apples.

Taste is central as we have already mentioned, however any on-pack communications in terms of the Class System & shelf life date should be clear and prominent.

Tray pack formats also deliver a perception of quality.



Quality is also reflected in terms of **freshness** the behind the scenes information.

Best in Season

Freshness is an important considertion for consumers when it comes to eating apples.

Locally produced apples are perceived to be more natural & better for you because they haven't travelled as far as imported apples & won't have been exposed to added chemicals or preservatives to ensure that they keep.

Making the best of seasonal produce is more top of mind for consumers these days so we should be communicating the benefits of in-season Irish eating apples and encouraging consumers to purchase.

Dunnes Stores have a communication on pack that begins to touch the surface of this recommendation.

Seasonal campaigns should be introduced to drive awareness.



Backing up campaigns

To back up any apple campaigns or promotions, there is an arsenal of further motivating information that could be communicated to the consumer.

More education in the care & attention and grower investment that is involved in growing Irish eating apples should provide a further story to Irish eating apples.

The key hook is the work that is completed by hand.

The man hours involved and the hand touch for thining, prunning and harvesting emphasis the care & attention that is invovled.

The *picked and stored* on the same day is another motivating message that communicates the quality around freshness and natural.



Positioning as premium

Once the quality and taste of Irish eating apples are understood, there is a strong sentiment to purchase.

Because of the qualities & taste profile that we have mentioned, consumers place Irish eating apples towards the premium end of the category, on par with Pink Lady.

Therefore Irish eating apples should be positioned at the same price point in-store as Pink Ladies.



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Thank you

