

PROJECT SCARPETTA

Bakery Category Presentation

27th June 2018

jump!

Bord Bia
Irish Food Board

The Thinking House

Hello.













There are six sections to this presentation.

1. *Introduction & Challenge*
2. *Today*
3. *Segments*
4. *Insights & Opportunity Platforms*
5. *Category Trends*
6. *Towards an Innovation Pipeline*
7. *Summary*



This study was conducted in conjunction with Jump Innovation!
March – June 2018



Introduction and Challenge

house

Bord Bia
Irish Food Board

IDENTIFY GROWTH OPPORTUNITIES IN BAKERY BY UNDERSTANDING WHERE CONSUMERS ARE TODAY, WHERE THEY ARE MOVING TO AND THE DRIVERS BEHIND THAT.

Specific objectives included:

1. Deep-dive changing consumer motivations and emerging needs in the Bakery category
2. Quantify shifts in behaviour, considerations and influences since 2014
3. Consumer understanding which can be applied to deliver more effective comms, promotions and NPD
4. Identify key category influencers, from retail trends to health and wellness issues
5. Deliver a new level of understanding which will help Bord Bía and its clients engage with the trade

For the purposes of this project, the 'bakery category' included:

a) "Plant" bread, i.e. commercially manufactured bread such as daily fresh white and brown breads, wholemeal, wholegrain, batch, soda and granary variants
b) International and speciality breads such as bagels, pittas and naan breads
c) In-store-baked goods such as breads, sweet and savoury pastries, muffins, scones and tarts

jump! A robust approach in order to gain category and consumer insight to inspire opportunities for growth.

EXPERT INTERVIEWS (IRELAND)

Understanding different dimensions of the category and its evolution.

Category/Retail interviews

Four experts recruited for their knowledge of the category in Nutrition, Retail, Artisan baking, and Ingredients.

Areas of exploration included:

i. Category overview
ii. Outside influences
iii. Consumer shifts
iv. Specific probes related to area of expertise

QUALITATIVE RESEARCH (IRELAND)

Understanding the needs of bread and baked goods buyers and consumers.

Insight & Consumer Workshop in Dublin

One x 2.5 hour workshop with two teams of consumers:

i. Households with children, frequent bread consumers 35-50 BC1C2
ii. Young child-free professionals, frequent bread consumers BC1 25-35

Focus Groups in Cork

Two x 1.5 hour Task-based Focus Groups with 6 x consumers each

i. Light bread consumers. Mix of households with / without children 30-45 BC1
ii. Households with children, frequent bread consumers 30-45 C1C2

QUANTITATIVE RESEARCH (IRELAND & UK)

Quantify attitudes, behaviours, opinions of the category and approach to food and health; create a new category segmentation.

Online survey

Two nationally representative samples of grocery shoppers:

i. Ireland N=503
ii. UK N=1002

Areas of exploration included:

i. Socio-demographics
ii. Purchase and consumption habits
iii. Approach to life and food
iv. Barriers and drivers to purchase
v. Need states
vi. New product quick-testing

Note on approach

Whilst key questions were retained for comparability from the 2014 study, question text was updated to reflect category needs of today and provide more of a future focus.

We're in growth. People are with us. We need to evolve to being more 'with them'.

"Bread. It's all I think about. I just love it."

The role of bread is evolving from one of a simple carrier to a positive contributor to people's lives and ambitions.

We are **central** to people's lives, both emotionally and functionally.

Emotionally, we are at the heart of 'home' and togetherness, a **powerful signifier** of care and nurturing.
We bring happiness – our absence creates tension.

Functionally, our job is **increasingly challenging** as we're caught between health goals and trends.

People **readily justify** our part in their food repertoire but there's an emerging tension; can I continue to enjoy you whilst also feeling good, both mentally and physiologically?

So people are becoming more **discerning** as tastes; goals; ingredients; expectations (the craft movement) evolve.

"I have a sneaky pastry in the forecourt when I go in for petrol"

The role of baked goods remains unchanged – we are about treating, excitement and indulgence.

There are, of course, functional and emotional challenges, and opportunities in this sector too, one typified by **fads** and therefore a need for **pace, invention and consistency**.

Emotionally, people want to feel '**buzzed**' by what they're bringing into their day.

But they also want to **feel good about it**. So we must continue to deliver taste; colour; excitement whilst adapting to stay 'fresh' and become 'better'.

Not 'good'; **'better'.**

People don't expect or want us to be 'good'; that's not our role.

And as for being "sneaky"; that's part of the **delight** we bring!

Now it's about 'what's next' and opportunities for growth.

‘What’s Next?’ - Opportunities for growth come from insight into people, their lives and behaviours, as well as what’s happening in the category and the operating environment.

People’s Emotional Needs

Humans are emotional beings and we make decisions, often irrational, to have those needs fulfilled.

By understanding these needs, we can create specific products to meet them.

This ensures we’re innovating in the right direction, and for the right reasons.

People’s Functional Needs

We are emotional but we also have an eye on the functional impact of our choices.

So we must deliver on both people’s emotional AND functional drivers.

For example, people will want taste AND health AND sophistication.

Occasions

We find opportunities by rethinking how we can fit into people’s lives and routines.

It’s estimated that people can now eat on eight different occasions every day.

Three meals a day no more.

This is a factor of contemporary living and is a global phenomenon.

People ‘Types’

To help understand who to best create and market a product towards, it helps to have a picture of that person in mind.

We want ‘everyone’ to eat our creations but we must have focus in what we do.

Therefore we divide populations into ‘segments’ to make it easier to think about who we’re selling to.

Bord Bia Lifestyle Trends + Bread/Baked Category Trends

Turning Opportunities into reality:
Forge links to create ideas that will inspire you and your target customers.

People's Emotional Needs	People's Functional Needs	Occasions	People 'Types'
I want to feel:	I'm looking for:	Right across the day:	How we differ from others:
Balanced	Balance	Pre breakfast	We're always in a rush
Adventurous	Strength	Post gym	We love new things
Discerning	Taste	Brunch	We stick to what we know
Indulgent	No sugar	Treat O'Clock!	

Bord Bia Lifestyle Trends + Bakery Category Trends



Today

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Increased average price and greater frequency in shopping trip driving growth in in-store bakery and plant bakery, respectively, in Ireland. UK market stagnates.

PLANT BAKERY +5% YoY

PLANT BREADS
Growth: +2.7% YoY

PLANT MORNING GOODS
Growth: +10.6% YoY

ISB +4.1% YoY

IN-STORE BAKERY BREADS
Growth: +5.3% YoY

IN-STORE BAKERY SWEET GOODS
Growth: +3.1% YoY

BREAD
Growth: -1.9% YoY

CAKES & PASTRIES
Growth: +1.3% YoY

MORNING GOODS
Growth: +0.1% YoY

Total category value
€525m
+4.8% YoY growth

Total category value
£5.9b
-0.1% YoY

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Source: Kantar/ Bord Bia Bakery Market Review Feb '18
Kantar UK '17

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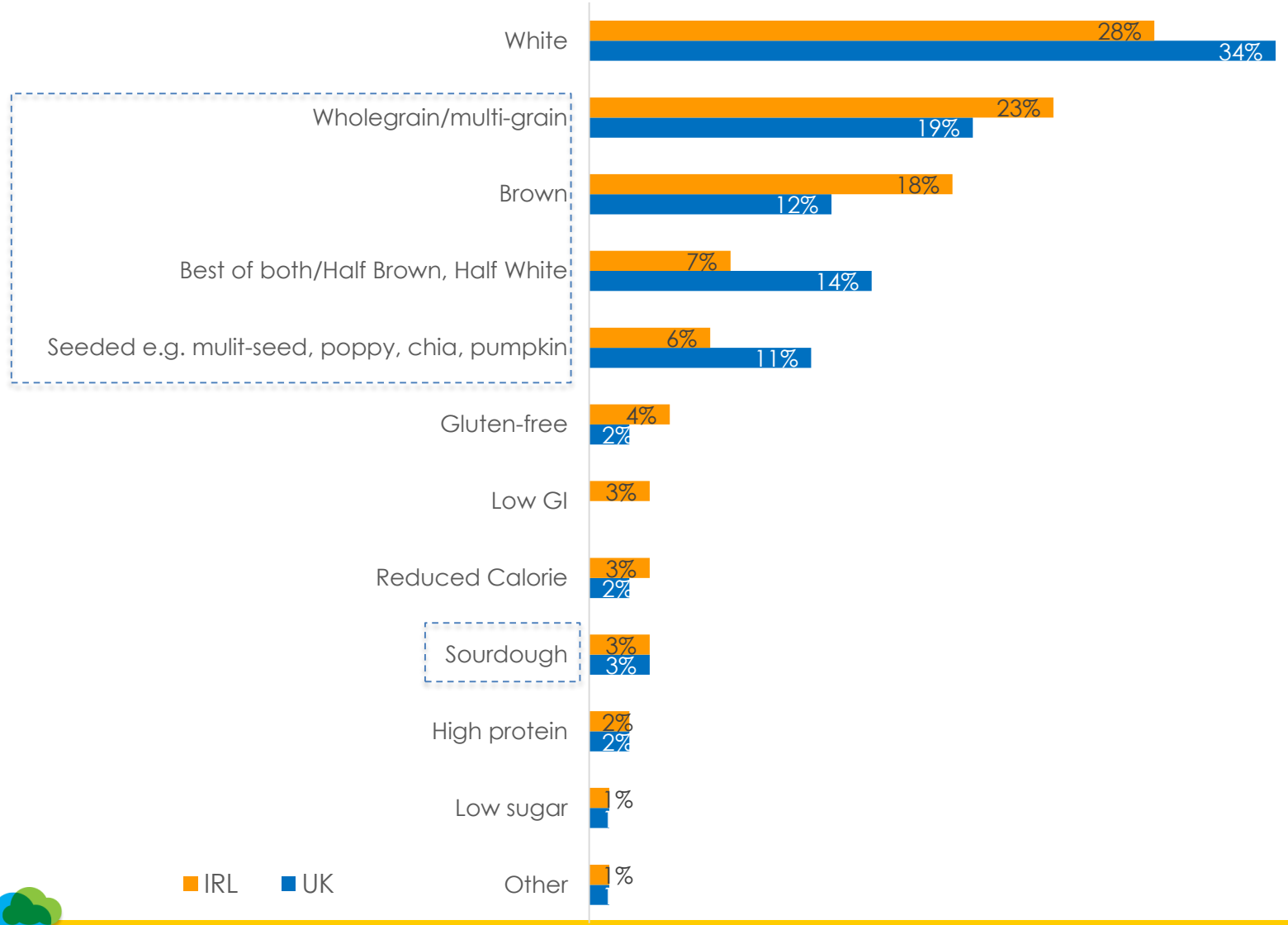
The growth number of food occasions is a key driver in the category's performance

Time of Day	Before Breakfast	Breakfast	Mid-morning	Lunch	Mid-afternoon	Early evening	Dinner	Late Evening	Saturday at 11	Nights
Occasion	Kick-Start	Rise and Shine	Enjoying the day	Lunchtime Nutrition	Treat O'Clock	Post-activity Replenish	With Dinner	Wind Down	Brunch	Parties & Occasions
Functional Job to be done	Wake me up to the day	Get me into gear	Keep me happy	Keep me going (stamina)	Break the monotony and add some zing!	Help my body put back in what that took out!	Maximise my enjoyment, and nutrition	Relax and unwind me	Satisfy and Interest me	Entertain and 'show off' (a little)
Behaviour	I'm up early and out the door and I need something quick and convenient to get me started	I'm in the car or on the way to work and I don't have time for breakfast	I'm in the mood for a little lightness to give me a little lift	I'm having lunch and I want something to help keep me going for the day ahead	I'm starting to flag and I need a boost to help me through it but so much is so wrong!	I'm finished the gym or training; my body needs protein to help me reap the benefits of the workout	I'm having my main meal of the day and I want something which gives me benefits (on top of taste!)	I'm watching TV before bed and I'm looking for something to accompany that – not too much as I'll be heading to bed.	I'm with friends, and this is our shared indulgent break into the weekend. Make it tasty and fun.	We're all together to share a great night and I want to share food that reflects me and my esteem for my guests
Think about										

White: still accounts for around one quarter of bread purchased most often, alternative products are growing by increasingly addressing consumers' functional and emotional needs.



*"I **buy sourdough all the time now**, which wouldn't have been really common before."*

Light consumer, Cork

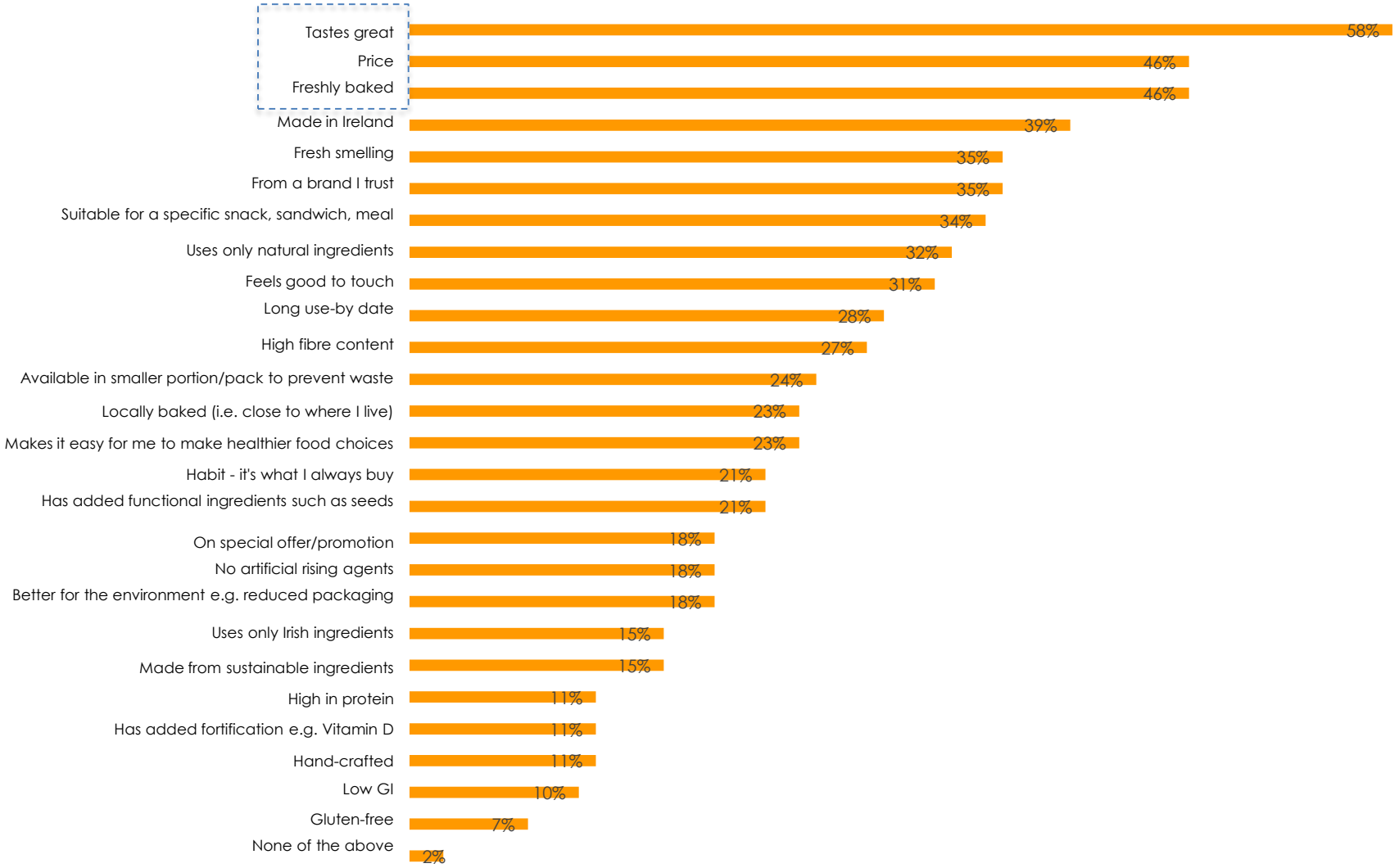
*"If there is an option I would certainly **try to avoid white bread**."*

Young Professional, Dublin

Q.7 When buying bread generally, which of the following do you choose most often?

Base: All N=503 (IRL), Base: All N=1002

Purchase drivers: taste, price and freshness remain top considerations for Irish consumers; however their needs are expanding.



Certain drivers are more associated with products from the in-store bakery and products from the bread aisle.

Shifts in rank from 2014 to 2018:

- 'Made in Ireland' moves up from 8th to 4th
- 'From a brand I trust' from 9th to 6th

*"**Taste and health are two of the biggest things I think of** when it comes to bread.*

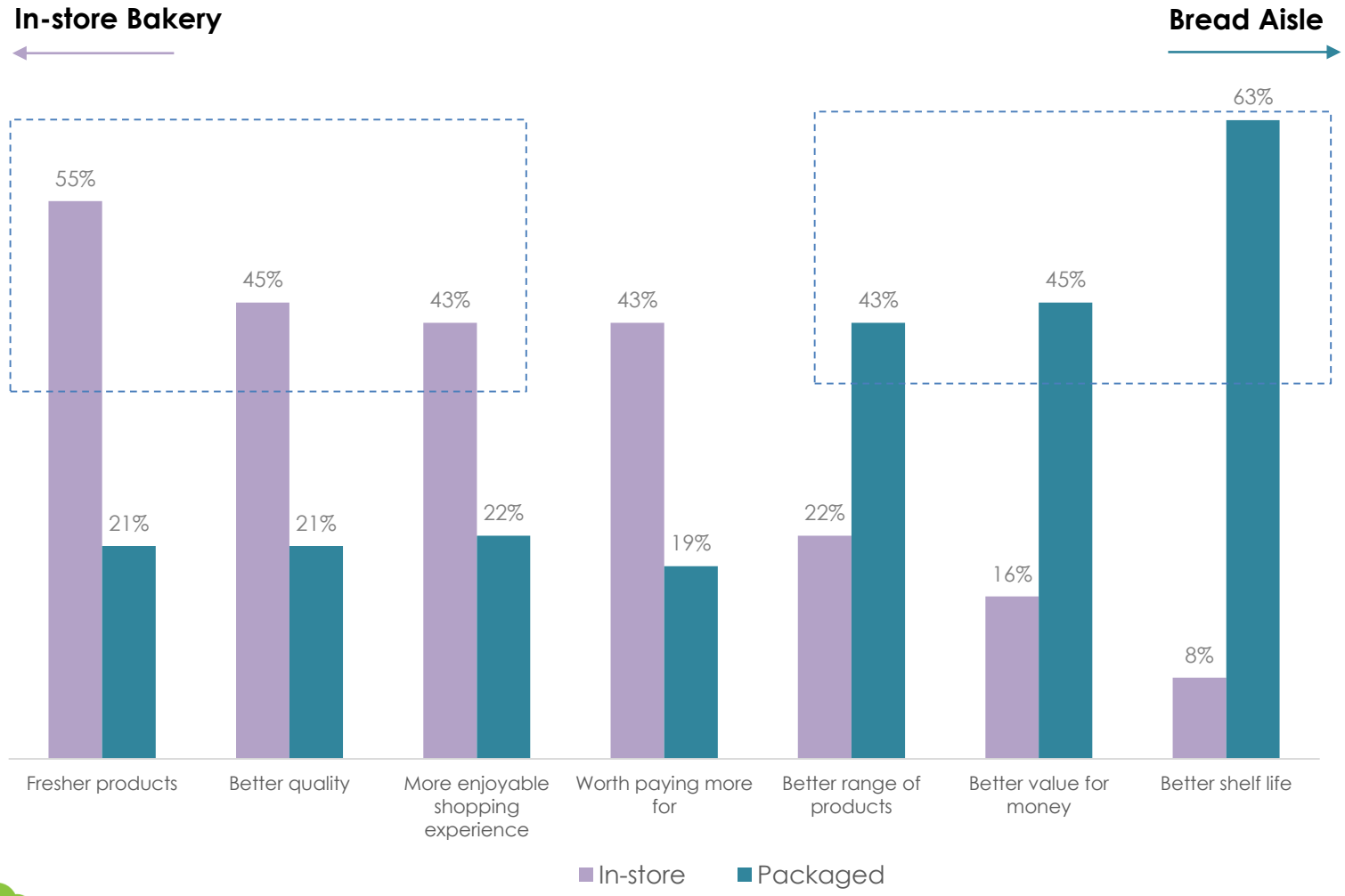
A good crust is hugely important – as is freshness, the smell, and the feel of a good bread."

Parent, Dublin

Source: Bord Bia/jumo! 2018, Ignite 2017

Base: All N=503 (IRL)

In-Store Bakery v The Bread Aisle: clear differences in what they're delivering for people demonstrating an opportunity for one to learn from the other.



Strengths associated with packaged 'off the shelf' breads and baked goods:

- Shelf life
- Value for Money
- Range of products

Strengths associated with in-store bakery:

- Freshness
- Quality
- More enjoyable shopping

When you go into the fresh bread section in the supermarket, you don't need to check the bread as there is an assumption that it will be fresh.

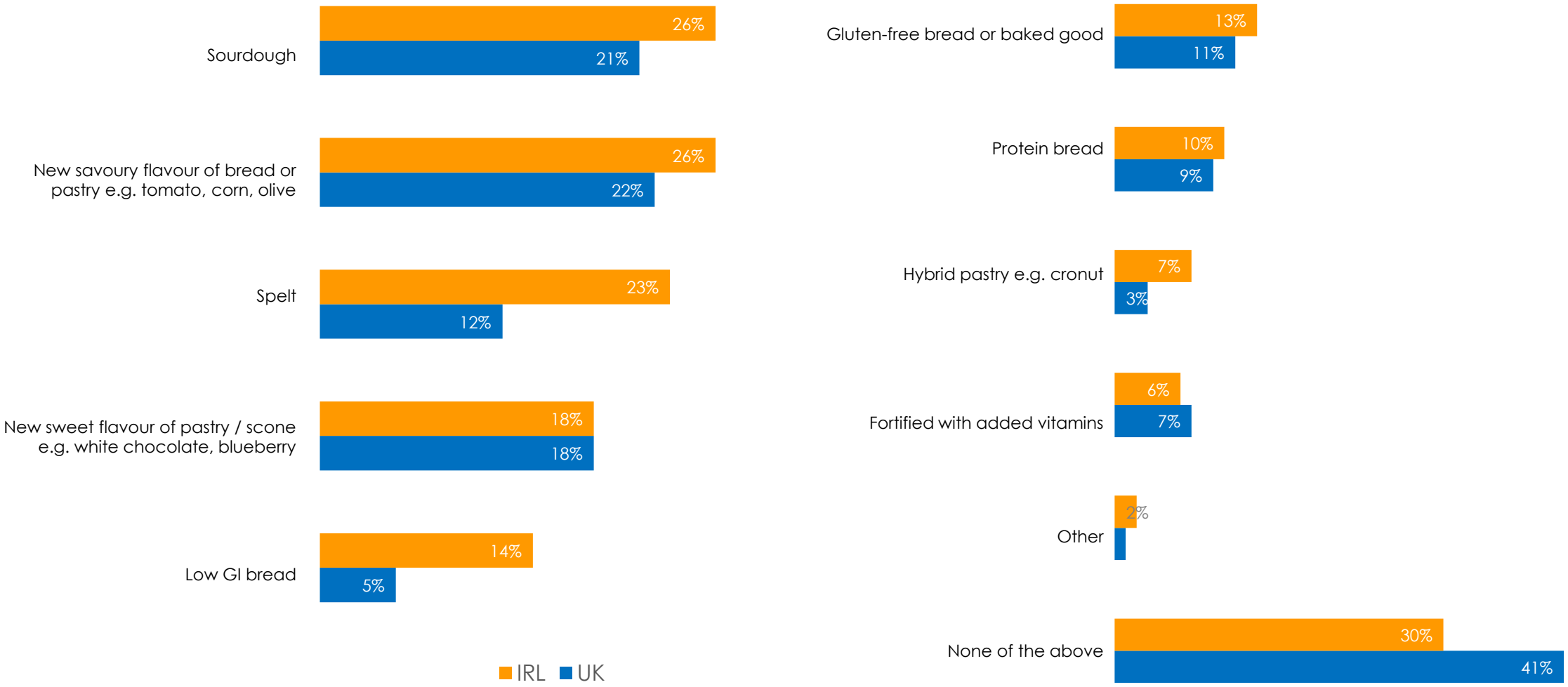
Parent, Dublin

Q10A Thinking about bread and baked goods, please use the slider to indicate whether you think each statement applies more to those which are baked in store (from the in-store bakery) or those which are packaged 'off the shelf; (from the bread aisle).

Base: All N=503 (IRL)

People are looking to new products/ingredients/flavours like sourdough and savory.

Expect these alternatives to continue to rise as interest in gut health grows and palette exploration expands.



Q.17 Thinking over the last year, what new products, ingredients or flavours of bread or baked goods have you tried?

Base: All N=503 (IRL), Base: All N=1002

People are largely forgiving of bread, but have their sights set on “Additives” and “Processed”.

Health and wellbeing is particularly salient for today’s consumers. % of People avoiding:



SUGAR
62% Ireland
56% UK



PROCESSED FOODS
48% Ireland
41% UK



SALT
40% Ireland
35% UK



CARBOHYDRATES
25% Ireland
18% UK

I’m making an effort to replace white bread with healthier options like wholemeal, seeded or sourdough.

(67% IRL; 53% UK)

32% of consumers purchase white bread most often when buying bread in general

(28% IRL; 34% UK)

IRELAND	UK	
65%	55%	*“I’m committed to living a healthy lifestyle”*
49%	50%	*“I eat healthily most of the time, but allow myself indulgent treats occasionally”*
66%	63%	*“It’s important that nothing artificial is added to my food”*
56%	47%	*“Being strong is more important than being slim”*

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Source: Bord Bia/jump! 2018
Base: All N=503 (IRL), Base: All N=1002

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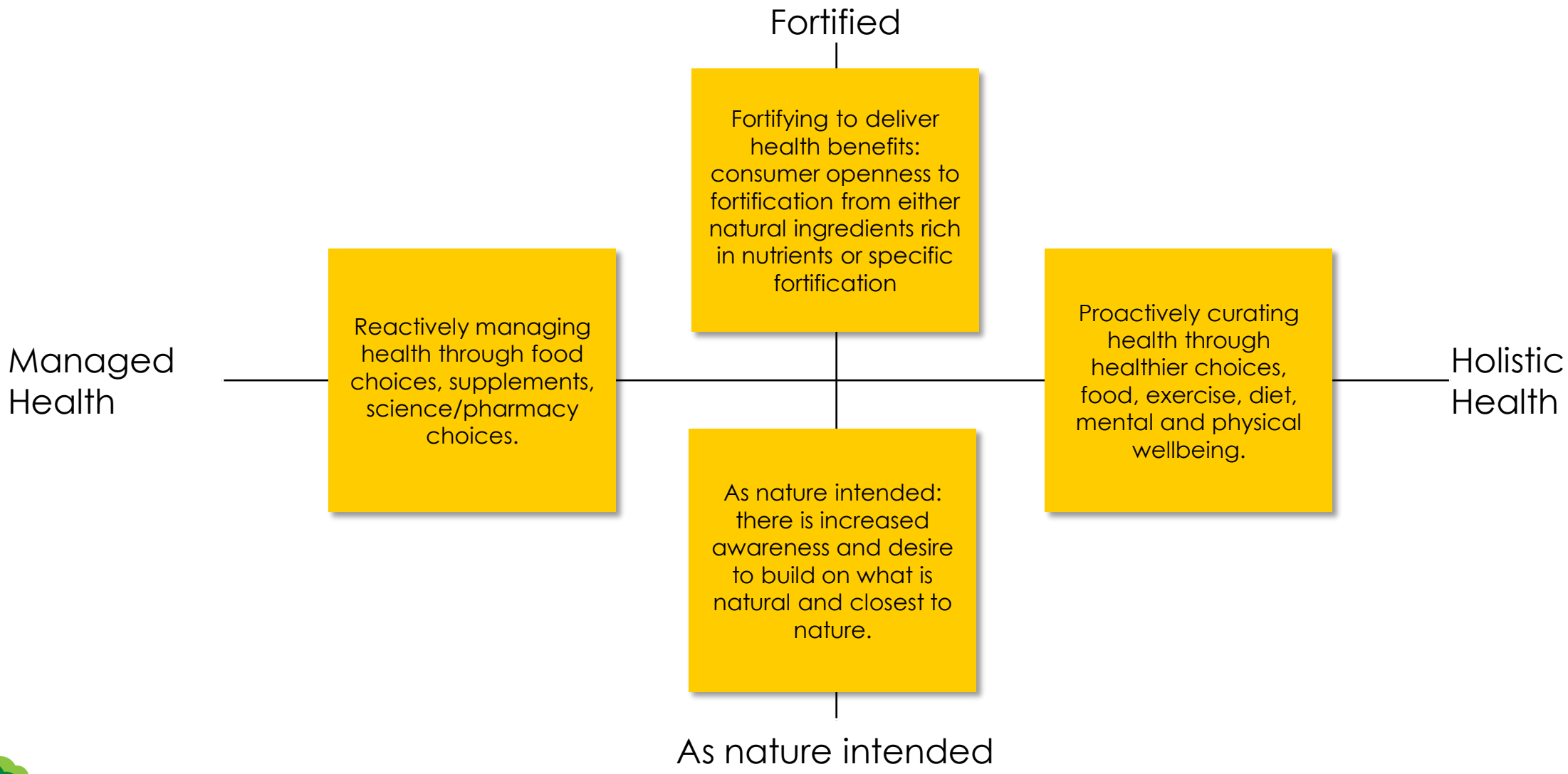
Anticipating evolving future Health & Wellness needs will help achieve relevance and credibility in innovation.

Energy	There's a rising global energy deficiency, driven by work and city living.
Strength	As people exercise and train more, they need more physical strength.
Sleep	Both sleep quality and quantity is getting lower. Tech is part to blame.
Detox	Growing demand to cleanse our system of toxins and badness.
Immunity	Fortifying ourselves against infection, illness, the weather, fatigue.
Relaxation	An increasing desire to slow down, meditate, find clarity.
Clarity	Looking for mental space and cognitive function boost.
Longevity	Putting strategies in place to live longer and fuller lives.

FUNCTIONAL – Be an ally and help people easily achieve their [evolving] needs.

People's approaches to food are becoming more informed; considered; strategic and we need to be clear about our approach to 'helping' them on this journey.



FUNCTIONAL – Be an ally and help people easily achieve their [evolving] needs.

Every occasion provides us with a health/wellness opportunity.

Time of Day	Before Breakfast	Breakfast	Mid-morning	Lunch	Mid-afternoon	Early evening	Dinner	Late Evening	Saturday at 11	Nights
H+W Moment	Kick-Start	Rise and Shine	Enjoying the day	Lunchtime Nutrition	Treat O'Clock	Post-activity Replenish	With Dinner	Wind Down	Brunch	Parties & Occasions
Functional Job to be done	Wake me up to the day	Get me into gear	Keep me happy	Keep me going (stamina)	Break the monotony and add some zing!	Help my body put back in what that took out!	Maximise my enjoyment, and nutrition	Relax and unwind me	Satisfy and Interest me	Entertain and 'show off' (a little)
Behaviour	I'm up early and out the door and I need something quick and convenient to get me started	I'm in the car or on the way to work and I don't have time for breakfast	I'm in the mood for a little lightness to give me a little lift	I'm having lunch and I want something to help keep me going for the day ahead	I'm starting to flag and I need a boost to help me through it but so much is so wrong!	I'm finished the gym or training; my body needs protein to help me reap the benefits of the workout	I'm having my main meal of the day and I want something which gives me benefits (on top of taste!)	I'm watching TV before bed and I'm looking for something to accompany that – not too much as I'll be heading to bed.	I'm with friends, and this is our shared indulgent break into the weekend. Make it tasty and fun.	We're all together to share a great night and I want to share food that reflects me and my esteem for my guests
Think about	**On the run & nutri-dense**	**How could my treat be better**	**Snackable; treatable; better happy**	**Taste with benefits**	**Energy booster snacks**	**Balanced replenishment**	**Indulgent sharing with visible good**	**Tasty & light relaxation**	**Enjoyable and wholesome**	**Dipping; breaking; sharing; good food.**



Segments

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Meet the Segments



TRIERS

'I love to experiment with food and try new things'



RELIERS

'I'm looking for reliable, trustworthy foods'



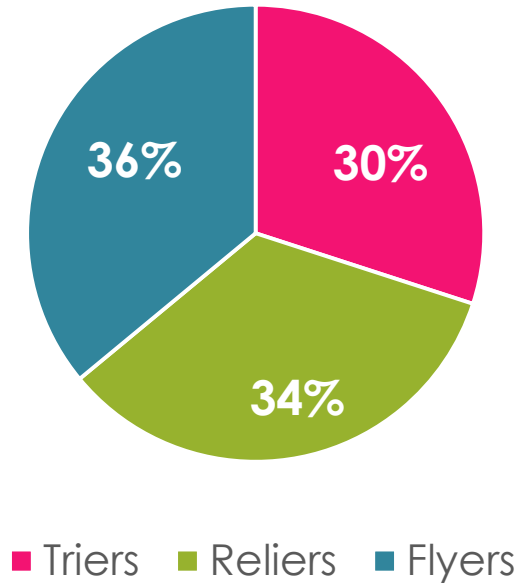
FLYERS

'I need food to get the job done without any fuss'

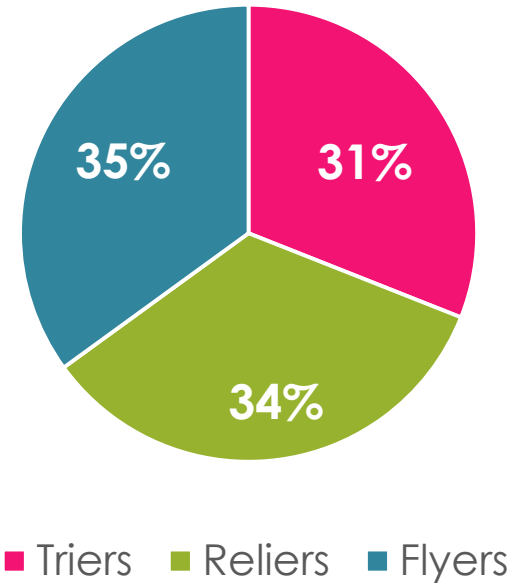
Source: Bord Bia/jump! '18

Segment share consistent across markets

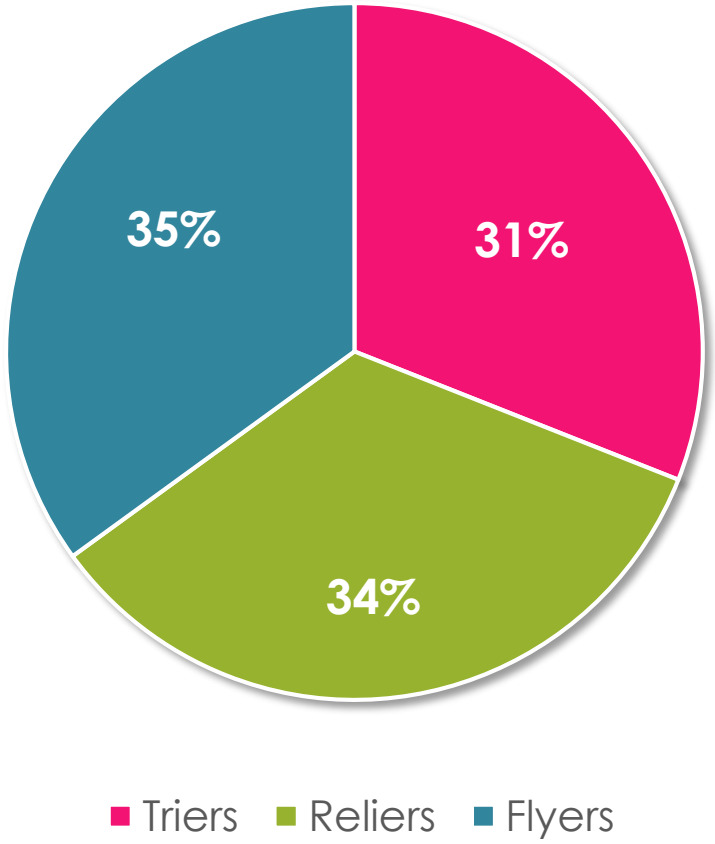
Ireland



UK

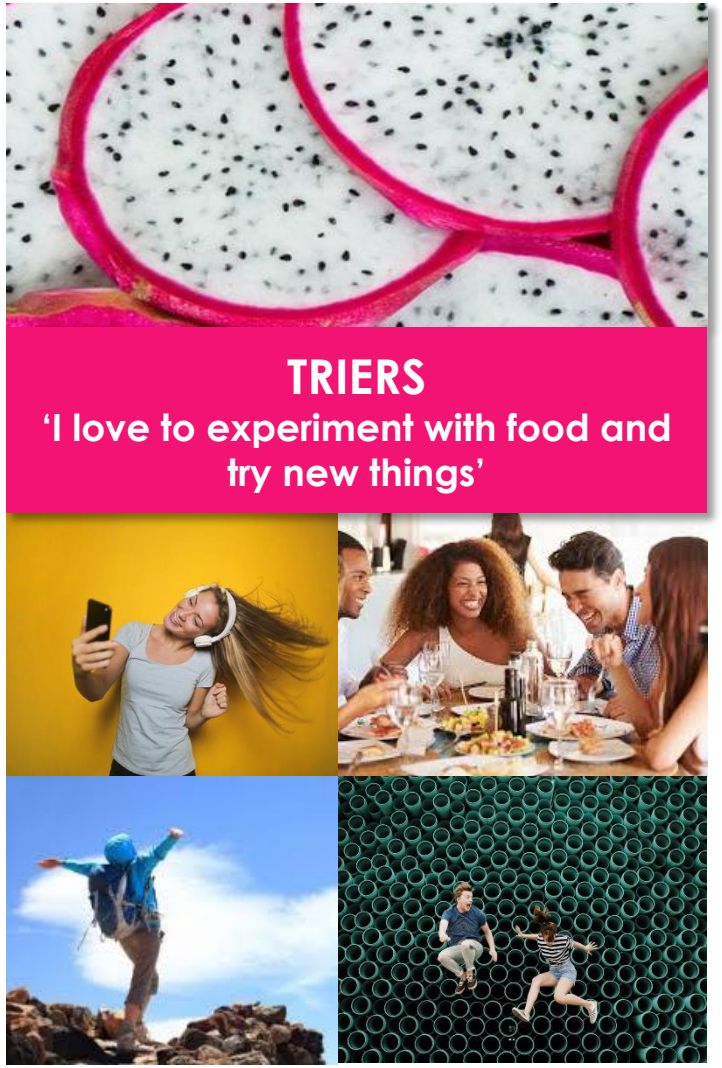


COMBINED



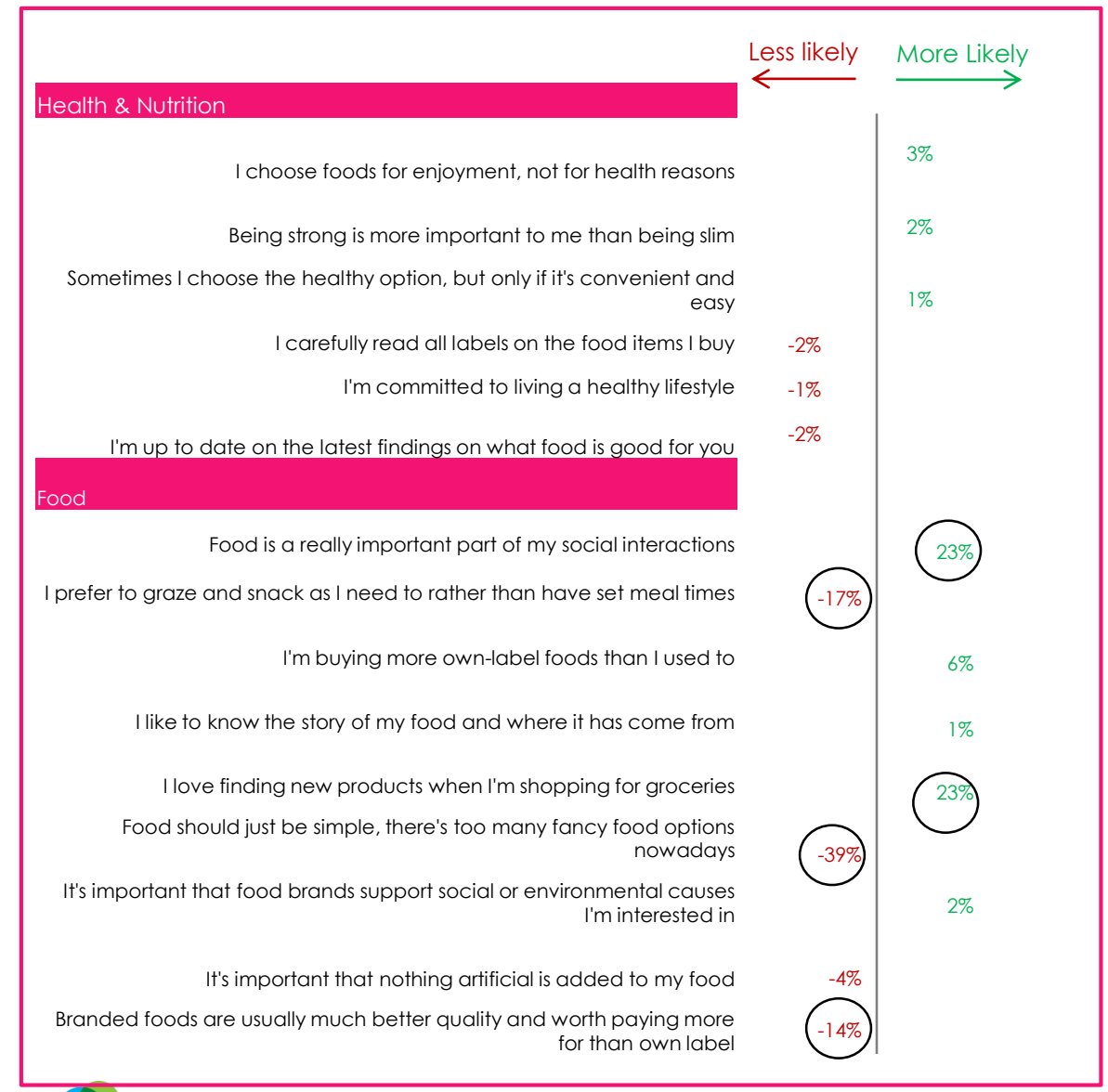
Source: Bord Bia/jump! '18

Introducing the TRIERS



- **Triers are the most adventurous segment.**
- They love finding **new products** when shopping for food and this in turn spills over into their bread purchasing.
- They're most likely to have **alternative types of breads** (e.g. wraps, naan) in the bread bin.
- Attract them with **new products, ingredients and flavours**.
- As they eat **healthily most of the time** but enjoy indulgent **treats occasionally**, sweet flavours are of interest as well as savoury.
- Given that food is a really important part of their social interactions, they're likely to be **important influencers**.
- Demographically they're fairly well represented across all age groups but are more likely to belong to the **ABCI** socio-demographic group.

TRIERS: over index on desire for food to play an experimental and social role in their lives. Not looking for the simple or safe option when it comes to food or bread.



Most likely segment to:

- Buy seeded bread
- Make impulse purchases from in-store bakery
- Have tried sourdough, new savoury and sweet flavours/products

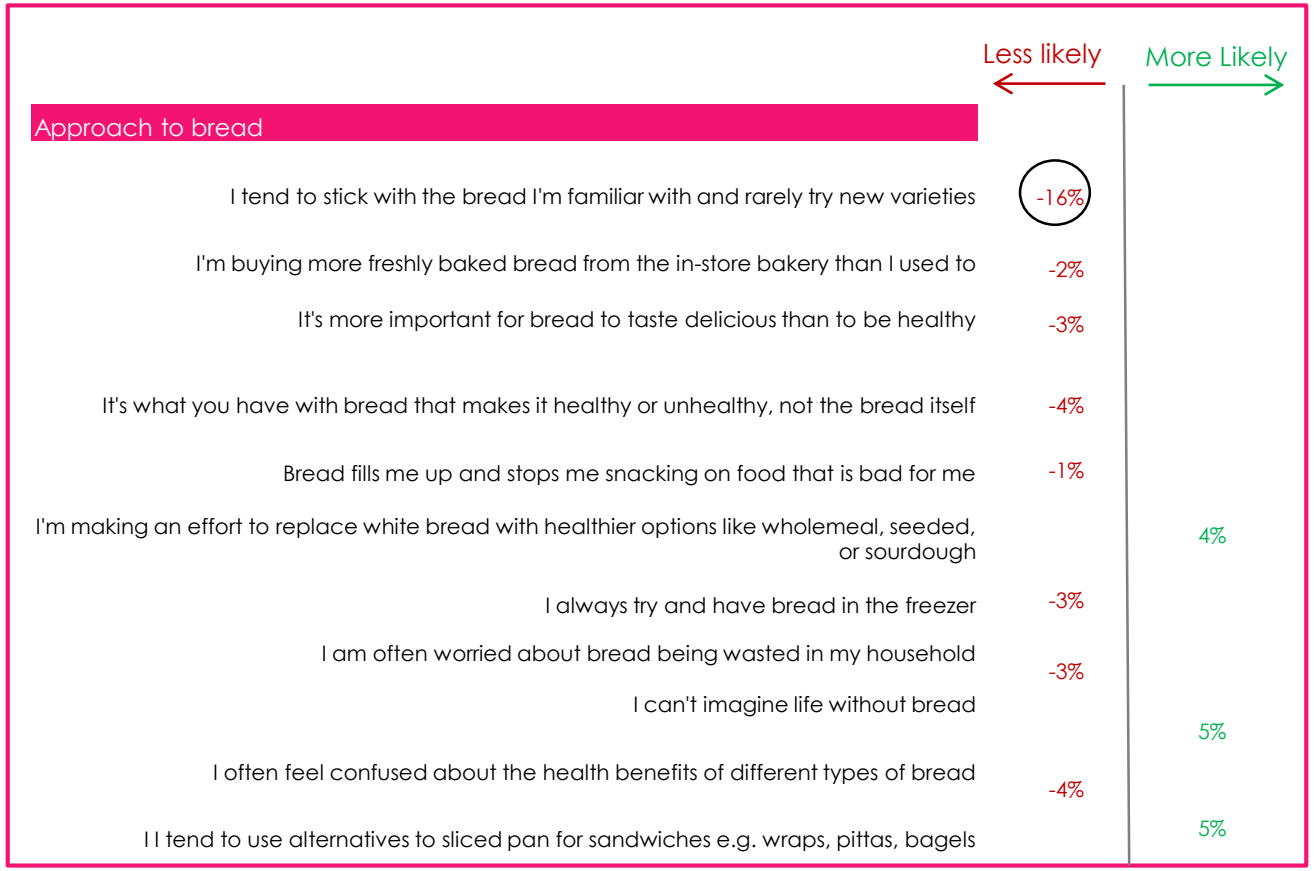
Yum/Yuk Index (Top 3):

1. Seeded loaf (105)
2. Tomato & Basil Loaf (114)
3. Bread fortified with Vitamin D (111)

Segment most likely to give 'thumbs up'.

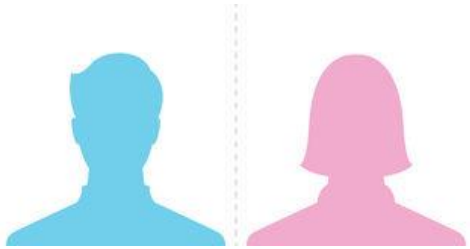
PSP Index*





TRIERS: skewed towards females, 45-54 year olds and ABC1.
More likely to have alternative breads (e.g. wraps, naans, flatbreads) in the bread bin.

Gender



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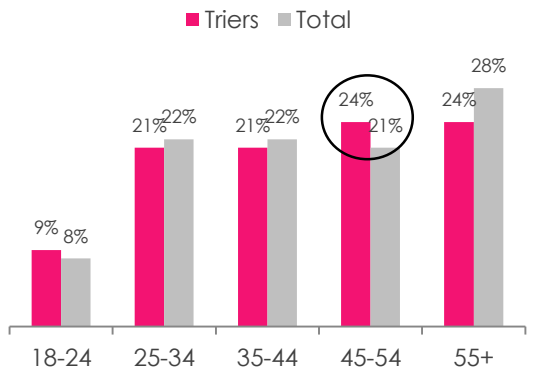
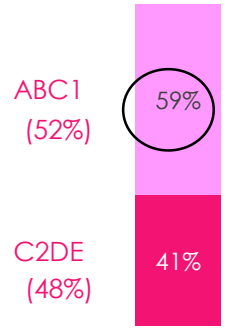
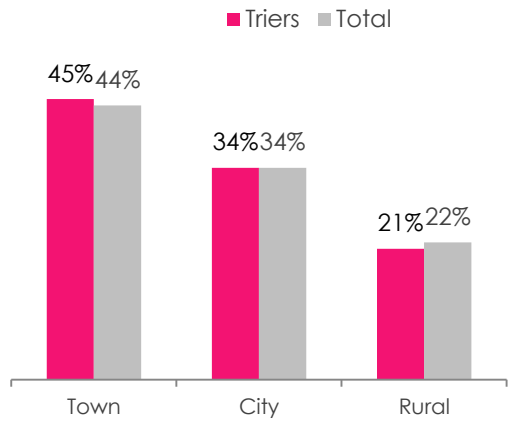
Age



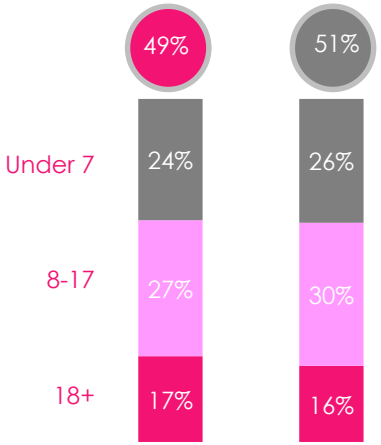
Social Class



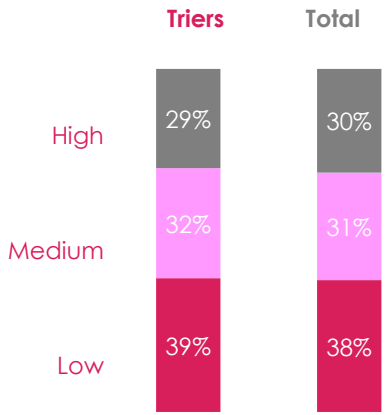
Region



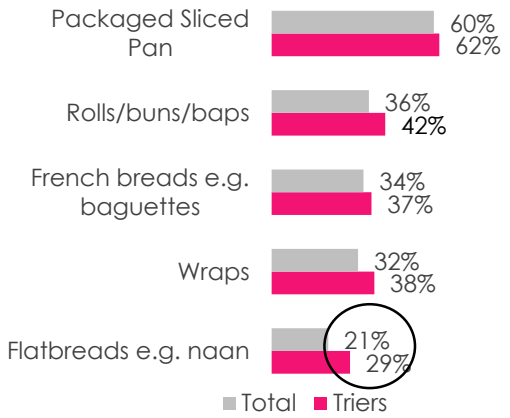
Children



Level of purchase



Breadbin Top 5



Baked goods

	Triers	Total
Scones	15%	17%
Sweet goods	24%	21%

Top sweet good:
Plain Croissant
(65% v 59%)

Introducing the RELIERS



RELIERS
'I'm looking for reliable, trustworthy foods'



- **Reliers are the most conventional segment.**
- They **stick with what they know**; when it comes to food this is expressed in a preference **branded products**.
- They're looking for brands (which **signify quality** for them) and **familiar** products rather than being interested in what's new on the shelves.
- They're less likely to have alternative bread products (like wraps or flatbreads) in their bread bin; they stick to the '**old reliables**'.
- They prioritise **healthiness** over taste.
- It is important to **reassure** this segment with **quality and provenance** guarantees; their demands of the category are more **straight-forward** than adventurous.
- Demographically they are an **older** group and more likely to live in a **rural** area.

RELIERS: loyalty to brands and familiar products high amongst this segment. A group which tends to stick with what they know and have functional rather than social or experimental demands of their food and bread.

Most likely segment to:

- Buy wholemeal bread
- Buy products from in-store bakery including rolls/buns/baps, sweet goods and bagels
- Have not tried new products/ingredients/flavours

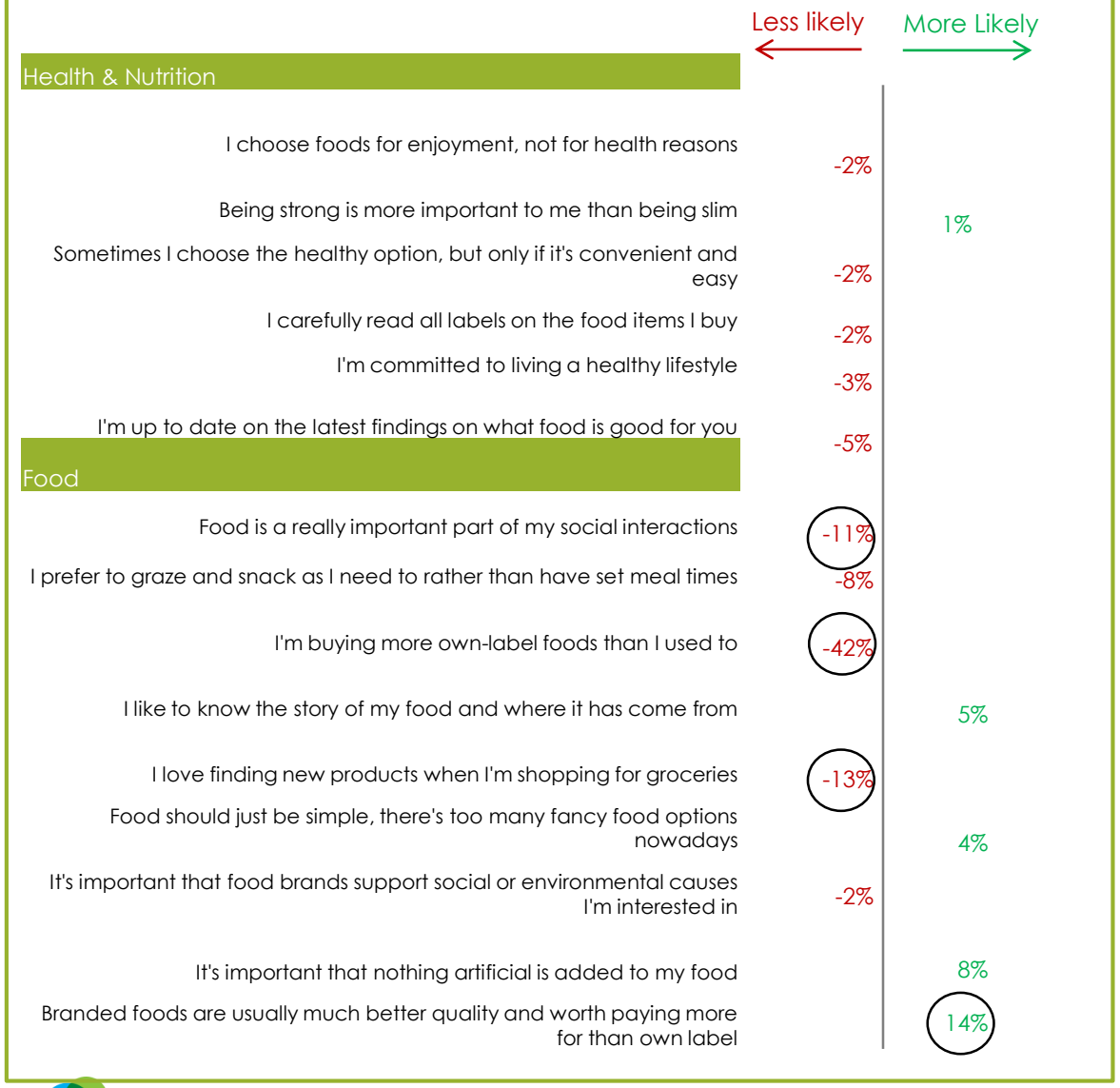
Yum/Yuk Index (Top 3):

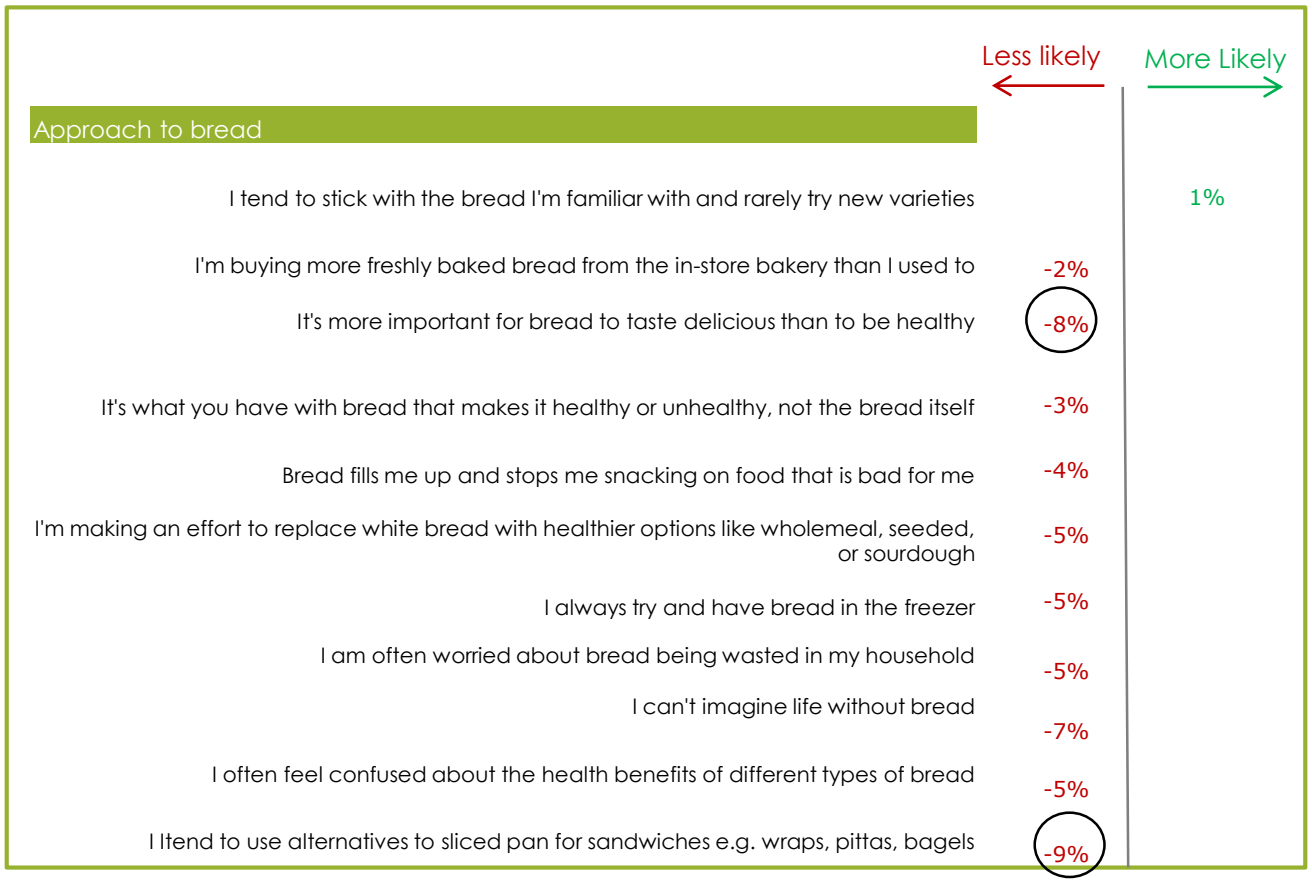
1. Seeded loaf (101)
2. Tomato & Basil Loaf (95)
3. Individually wrapped pastry(99)

Least likely segment to gives 'thumbs up'

PSP Index*

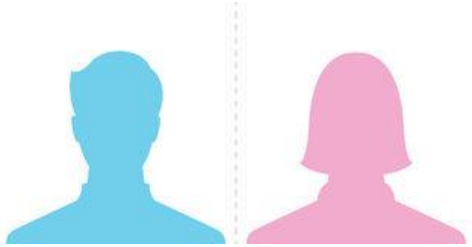
93





RELIERS: older skew more likely to live in rural area.
Less likely to have alternatives such as wraps or flatbreads in the bread bin.

Gender



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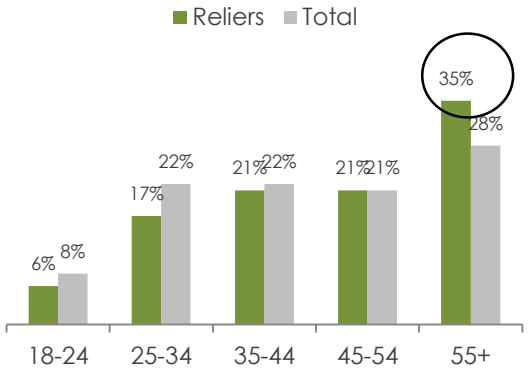
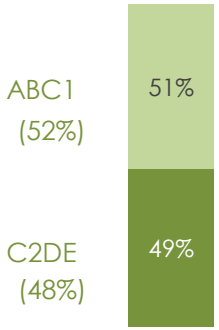
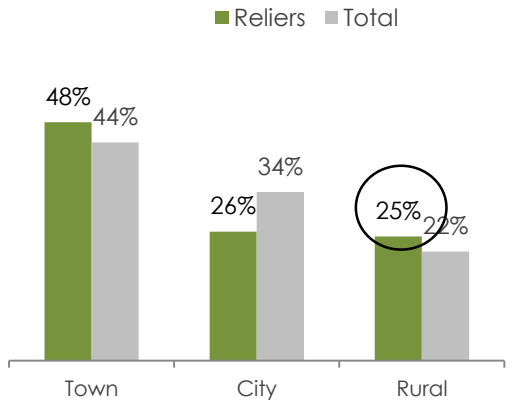
Age



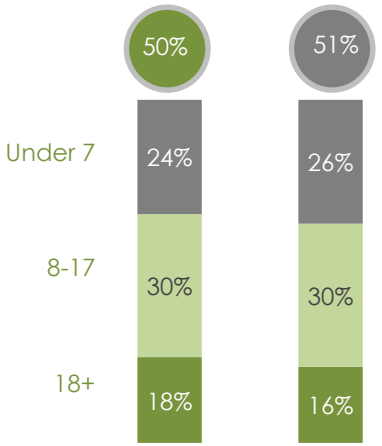
Social Class



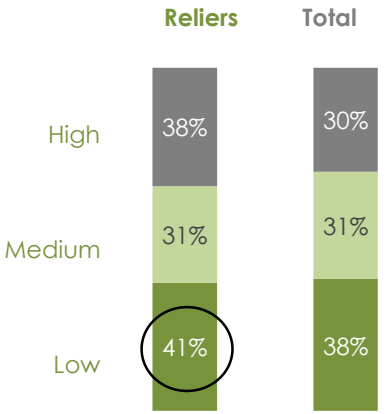
Region



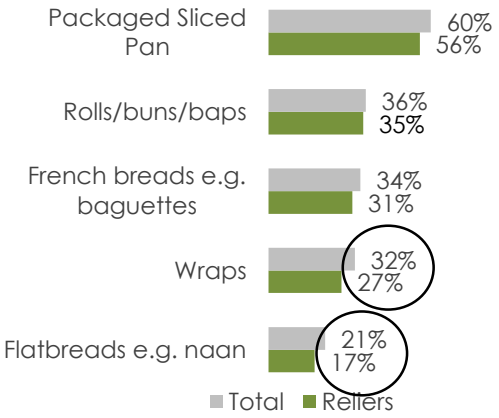
Children



Level of purchase



Breadbin Top 5



Baked goods

	Flyers	Total
Scones	17%	17%
Sweet goods	20%	21%

Top sweet good:
Plain Croissant
(62% v 59% total)

Introducing the FLYERS

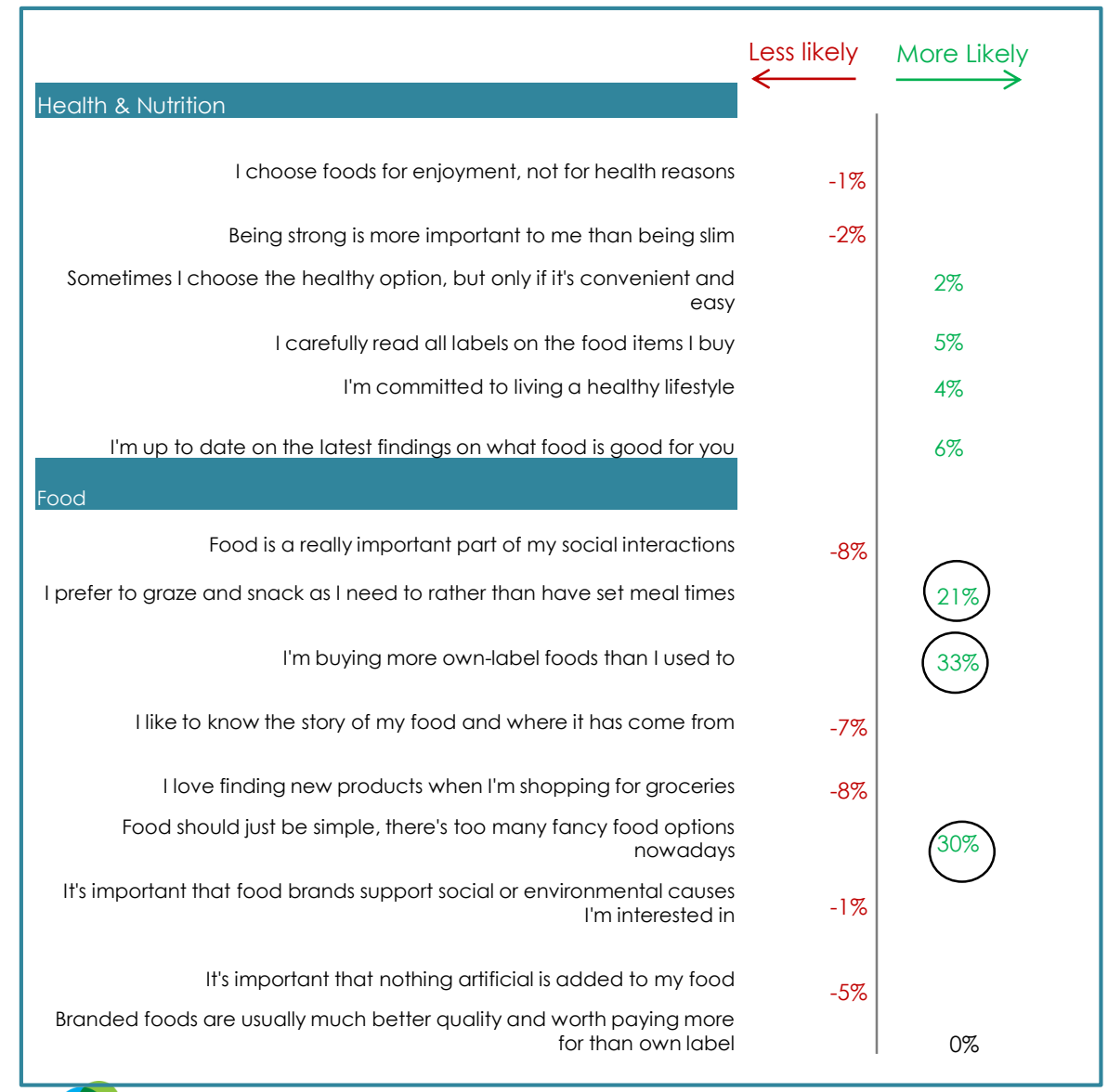


FLYERS
'I need food to get the job done without any fuss'



- **Flyers are driven by convenience and 'handiness'.**
- Given their tendency to **buy more own label than they used to**, they are also driven by **value**.
- This, in part, influences their preference for **simple food products** over 'fancy' options; they need affordable options which **get the job done**.
- A preference for **grazing and snacking** in place of set meal times is reflective of fast paced lives.
- They are less interested in finding new products while shopping and this in turn results in sticking with breads they are **familiar** with.
- When it comes to bread, it is more important to deliver **taste over health**.
- Demographically they are a **younger, city dwelling** segment and more likely to be **C2DE**.
- It is likely that we see a **pre-family** (younger people living alone) **and families with young children** split within this segment – two groups driven by convenience.

FLYERS: prefer simple, 'get the job done' options.



Most likely segment to:

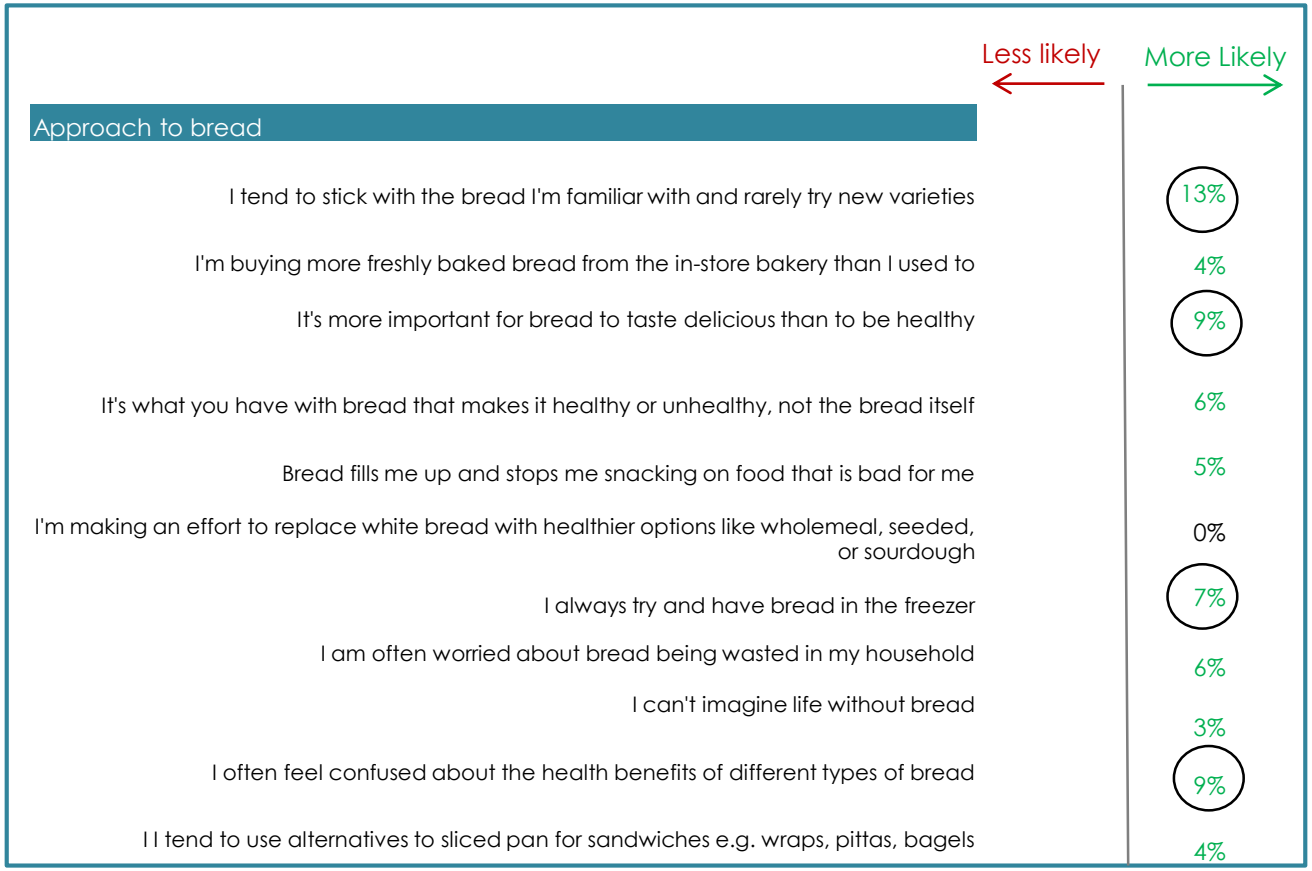
- Expect to purchase more bread and baked goods and sweet goods in the next year
- Buy white bread most often
- Try to have bread in the freezer

Yum/Yuk Index (Top 3):

1. Seeded loaf (95)
2. Cinnamon Swirl (103)
3. High Protein Bread (104)

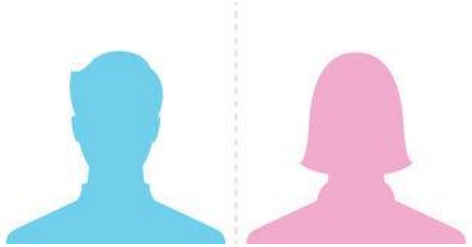
PSP Index*





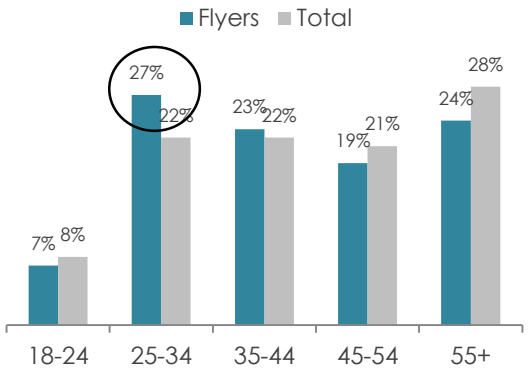
FLYERS: skewed toward city living and C2DE.
More likely to be 25-34 – split between families with young children and those living alone.

Gender

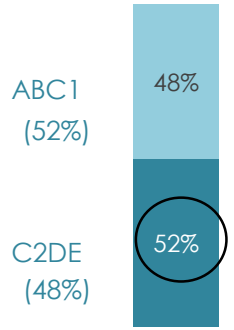


Index: 110 95

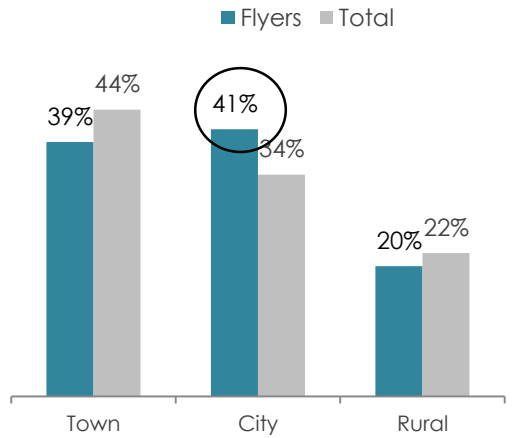
Age



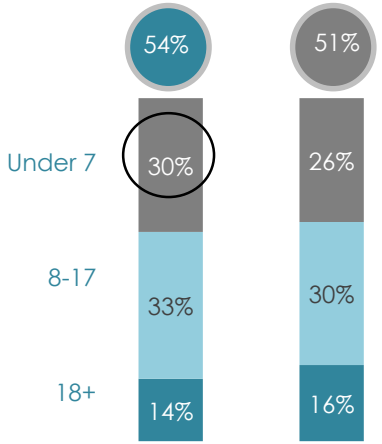
Social Class



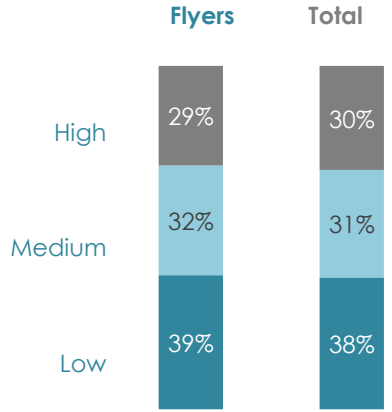
Region



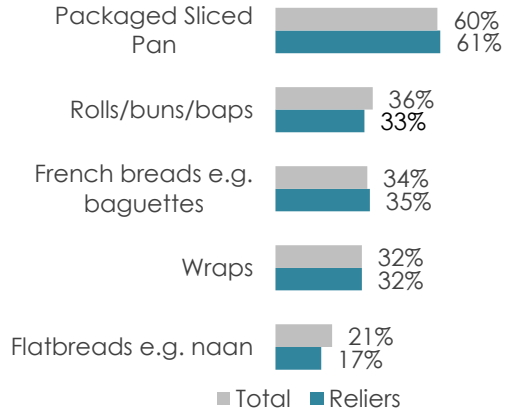
Children



Level of purchase



Breadbin Top 5



Baked goods

	Flyers	Total
Scones	19%	17%
Sweet goods	19%	21%

Top sweet good:
Donuts
(63% v 55% total)

Key needs and attributes of each segment point to different innovation needs.



TRIERS

Look to snack and mealtimes for more than nourishment – they're keen to expand their repertoire with novel options.

Key codes for Innovation:

1. **Be daring**
2. **Be sharable**
3. **Be enlivening**



RELIERS

More conservative in their bread consumption. They take comfort on 'the old reliables' delivering time and again.

Key codes for Innovation:

1. **Be there**
2. **Be pure**
3. **Be storyful**



FLYERS

Need bread and baked goods to get the job done, no messing as they need to accommodate busier lives.

Key codes for Innovation:

1. **Be feasible**
2. **Be adaptable**
3. **Be straight-up**



Insights and Opportunity Platforms

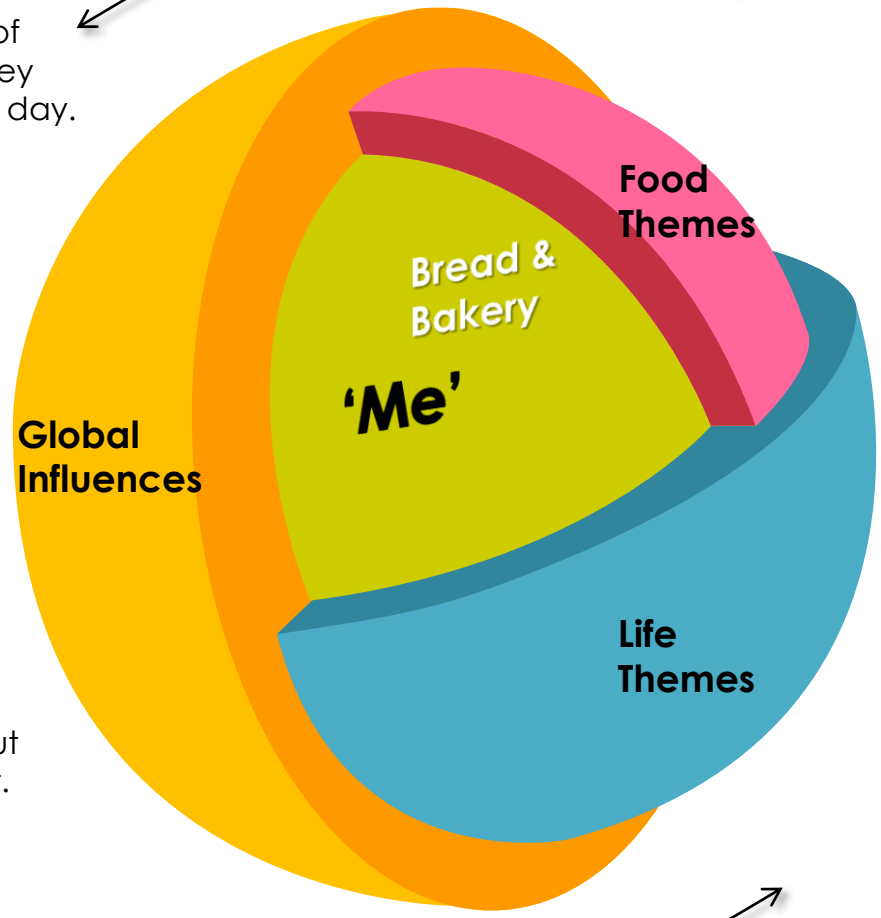
jump!

The Thinking House

Bord Bia
Irish Food Board

WE ARE THE CENTRE, AND WE MUST HOLD

Bread and Bakery. Closest to the consumer. Brings Togetherness and engenders feelings of Contentment and Familiarity (and more!). They are fundamental to our ability to take on the day.
We are the centre.
And we must hold.



With **Food**, we want Nourishment and Better Food Habits but face challenges around cost; time; skills; pace of life; obesity; fussiness; various myths and truths

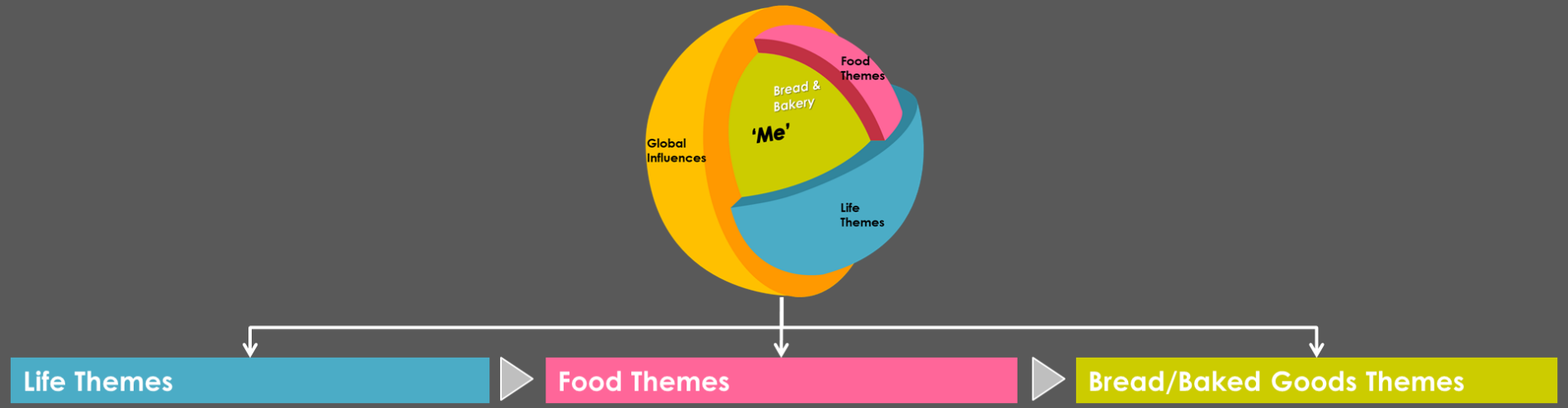
Globally, we want harmony and certainty but are faced with relentless Turmoil and Conflict. This is so far out of people's control that we can feel helpless.
And so we retrench to that which we *can* control.

In **Life**, we seek Balance and Growth but are faced with 'near-in' challenges around home ownership/rent; homelessness; commuting; security and safety etc

Unravelling the globe to identify big opportunity platforms

1
Identify themes through research

2
Explore theme links and insights



3
Build these into 'Opportunity Platforms'

4
Use the platforms to inspire ideas for growth





Life Themes ▶ **Food Themes** ▶ **Bread/Baked Goods Themes**

TIME & SPACE



There's an increasing quest for physical and mental room to 'breathe and nurture' oneself, to be more connected with oneself and one's surroundings.

LOCATION (IN/OUT)



In response to the need for more time & space, we move freely between eating locations and occasions, enjoying catering and being catered for.

APPRECIATION



A rising awareness of the effort, as quantified by time, that goes into baking certain products means people appreciate time as a new quality metric.

People are seeking the reassuring luxury of time and space

jump!

Time & Space | Location | Appreciation

AND BREATHE...

People are seeking the reassuring luxury of time and space

WHAT'S HAPPENING

There's an increasing quest for physical and mental room to 'breathe and nurture', to be more connected with oneself and one's surroundings.

LEARNING FOR 'BREAD AND BAKED':

People view time spent making/baking the products they choose as a new quality metric.

Market Evidence

Examples of products meeting this need



Stonemill Craft Bakery bread is fermented for four hours



Lululemon has launched its first-ever 'Mindfulosophy' space in New York Retail Stores.



Firehouse Bakery & Bread School offer a bread 'retreat' on Heir Island



At Restival leave the stresses, strains and mod cons of modern life behind.

When?

- Lunchtime Nutrition
- With Dinner
- Treat O'Clock
- Wind Down
- Brunch

Emerging Trends and Inspiration

- Sourdough
- Cooking and Baking Retreats
- DIY bread baking (i.e. sourdough)
- Mindfulness going mainstream
- 'Slow Food' Movement

Product Characteristics

- Short ingredient list
- Ancient grains & flours
- All-Natural
- No preservatives
- Handmade processes
- Long fermentation
- Hand milled flour

Starter Opportunities:

- *Bake at home breads and baked good*
- *Focus on process in messaging on pack*
- *Sourdough starter kits*

Source: Bord Bia/jump! 2018

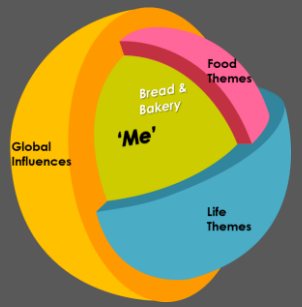
The Thinking House

YUM/YUK

50% give *Spelt Bread* a 'thumbs up'

KEY STATS

43% said 'fresh baking smells' prompts them to buy new bread or in-store baked goods outside of their usual shop.



Life Themes ▶ **Food Themes** ▶ **Bread/Baked Goods Themes**

BALANCE



The ability to get everything that's important to me into my routine. A usually unobtainable mission!

JUSTIFICATION



People also speak about Balance in their food choices however they can quickly justify unbalanced choices because '#life'!

TREAT



In the car; at the weekend; when people call; Bread & Bakery is an acknowledged and welcome indulgence that people readily justify.

People want to enjoy the good things in life; often in moderation

jump!

Balance | Justification | Treat

BALANCING. ACT?

People want to enjoy the good things in life; often in moderation

WHAT'S HAPPENING

People want the ability to get everything that's important to them into their routine. A usually unobtainable mission!

LEARNING FOR 'BREAD AND BAKED':

People speak about Balance in their food choices however they can quickly justify unbalanced decisions because '#life'!

YUM/YUK

64% give *Cinnamon Swirl Bread* a 'thumbs up'
46% give *Chocolate Bread* a 'thumbs up'

Market Evidence

Examples of products meeting this need



Fitbit and Apple Watch allow users to keep themselves in check re: calories and activity



Avonmore's Balance Milk is fortified to help achieve equilibrium in a busy life



Single serving pastry snacks dominate Asia



Brands from Heineken to Gordon's Gin have launched low alcohol products

When?

Kick-Start | Rise and Shine | Enjoying the day | Treat O'Clock | With Dinner

Emerging Trends and Inspiration

- 'Treat Yourself' mentality
- Rejection of fads & regimes
- Traditional 9-5 routines breaking down

Product Characteristics

- Single serving/easy impulse buys
- Tempting treats
- Approachable health claims (signalling *better)*

Starter Opportunities:

- *Eye catching bread and bakery treats*
- *Snackable options for on-the-go living*
- *A balance loaf that doesn't sacrifice taste for health!*

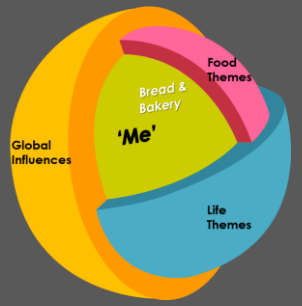
KEY STATS

56% agree that 'sometimes I choose the healthy option, but only if it's convenient and easy'.

Source: Bord Bia/jump! 2018

The Thinking House

jump! Platform 3



Life Themes ▶ **Food Themes** ▶ **Bread/Baked Goods Themes**

REDISCOVERY & GROWTH



"This point in my life is about growing". new jobs; new families; new outlooks.

REGIMES



There's an App for that, and there's a diet for this. Eating regimes are like brands, even suggesting what our values are

EXPERIMENTATION



People are increasingly open to, and indeed expectant of, new bread and bakery creations. Sourdough is rocking; Donuts are peaking; what's next!?

People are craving interesting, sensory experiences that make them feel immersed and alive. They want to explore everything within their reach

jump!

Growth | Regimes | Experimentation

OPERATION EXPLORATION

People are craving interesting, sensory experiences that make them feel immersed and alive. They want to explore everything within their reach

WHAT'S HAPPENING

People are seeking out ways to engage with the extraordinary; they want to get in on the action and add a dash of adventure to their day to day.

LEARNING FOR 'BREAD AND BAKED':

People are looking for boldness, to taste the cuisines of the world and to experiment with exciting new offerings.

The Thinking House

YUM/YUK

39% give *Exotic Flavoured Breads/Wraps* a 'thumbs up'

Market Evidence

Examples of products meeting this need



Londoners and New Yorkers going crazy for Taiyaki



Wild Air Run challenges adults to tackle larger than life inflatable obstacles



Sweet Nirvana Bakery curate cannabis baked goods



Modern Adventure curates travel experiences with local guides.

When?

- Enjoying the day
- Lunchtime Nutrition
- With Dinner
- Brunch
- Parties & Occasions

Emerging Trends and Inspiration

- International formats and recipes
- Hybrid creations
- Flavoured bread and bakery

Product Characteristics

- Worldly flavours
- Playful, eye-catching packaging
- Unexpected bakery 'mash up' of flavour, texture, format
- Sensory retail experience

Starter Opportunities:

- *'Taste the World' range of international flavours*
- *Experiment with texture, smell and visual appeal of product and display*

Source: Bord Bia/jump! 2018

KEY STATS

71% love finding new products when they're shopping for groceries.

jump! Platform 4



Life Themes	Food Themes	Bread/Baked Goods Themes
HOME	**JOY**	**ABUNDANCE**
		
A well-documented key tension for many – rents; affordability etc. People need a sense of place, an anchor. Without 'home' we have reduced 'community'.	Food is a happiness creator, more than that, it brings joy. People talk about anticipation; excitement; experimentation; bonding - WOW!	Bread and Bakery are plentiful and everywhere; they're often the highlight of the shopping, and eating experience. The choice is loved.

People want to enjoy the carefree abundance of home.



Home | Joy | Abundance

JOYFUL TOGETHERNESS

People want to enjoy the carefree abundance of home.

WHAT'S HAPPENING

People need a sense of place, an anchor, but this is proving more difficult to achieve for many. Food is used to create that feeling of belonging.

LEARNING FOR 'BREAD AND BAKED':

People are looking for opportunities to feel they belong and for experiences that evoke feelings of home.

The Thinking House

YUM/YUK
68% give *Packaged Sliced Pan* a 'thumbs up'

Market Evidence
Examples of products meeting this need



BKD curates personalised baking boxes (and subscriptions) for kids to encourage playful family time.



Illustrator Rami Niemi doodled all over Solrug's rye bread to depict a community of doodles people and animals enjoying toast together .



Mast Brothers Chocolates incorporates the texture of salt into their packaging to invoke the flow and feel of the sea.



Queer Eye, a Netflix series where five guys help people get their life back on track is promoting community in a joyful way.

When?

- Treat O'Clock
- With Dinner
- Wind Down
- Parties & Occasions

Emerging Trends and Inspiration

- Community party meals using food trucks or pot lucks
- Art installations evoking 'home' themes
- Planet friendly focus
- Subscription service

Product Characteristics

- Shared platters
- Natural flavours and pigments
- International cuisines and flavours; greater accessibility

Starter Opportunities:

- *Launch a 'joyful' community mixer to put people and bread back at the centre of community spirit*
- *Use natural, homey flavours e.g. salt*
- *Video content show casing the 'joyful community' behind your bread*

KEY STATS
64% agree that food is a really important part of their social interactions.

Source: Bord Bia/jump! 2018

jump! Platform 5



Life Themes ▶ **Food Themes** ▶ **Bread/Baked Goods Themes**

HEALTH & WELL-BEING



A greater awareness of mental and physiological needs means we're conscious of the impact our choices have on us

WOKE-EATING



'Food' must justify its ingredients to the consumer. We're very aware of what's in our food and its impact on us/the world (even if we're not always right!)

(EMERGENT) DEMANDING



People are clear; bread, and baked goods, need to be healthier, they want cleaner ingredients. They're happy to overlook when the mood suits. For now.

People want to make positive and conscious choices for their entire selves

jump!

Health & Well-Being | Woke-Eating | Demanding

GET BETTER

People want to make positive and conscious choices for their entire selves

WHAT'S HAPPENING

A greater awareness of mental and physiological needs means we're increasingly conscious of the impact our choices have on us.

LEARNING FOR 'BREAD AND BAKED':

People can turn a blind eye when it suits but we must manage our own destiny and advance towards clean and clear offers.

The Thinking House

YUM/YUK

40% give *Grain-Free Bread e.g. using Coconut / Almond Ground flours* 'thumbs up'

Market Evidence

Examples of products meeting this need



Halo Top ice cream with only 280-360 calories per pint, so it can be enjoyed more regularly



Nüco Coconut Wraps are a low-cal, low-carb, gluten-free alternative to bread & tortilla wraps



For Patagonia, environmental responsibility has been the start-point for many innovative campaigns & products



Einkorn flour is a nutrient rich ancient grain that retains much of its goodness during processing

When?

Kick-Start | Rise and Shine | Enjoying the day | Lunchtime Nutrition | Post-activity Replenish

Emerging Trends and Inspiration

- The growth of 'pure' (more wholesome products with less ingredients)
- Rising desire for food 'enhancements'
- Low or slow processes

Product Characteristics

- More 'wholesome' cues (nuts, seeds, imperfect look & feel)
- Specific nutrient / ingredient that adds a certain health benefit
- Powerful ethical story

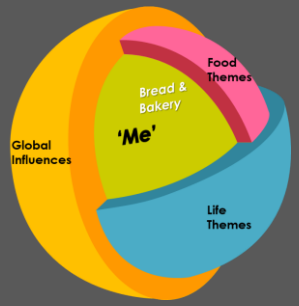
Starter Opportunities:

- *Utilising nutrient rich wheats e.g. ancient grains*
- *Purer products with less ingredients and less process*
- *'Stronger' bread and baked goods with natural enhancements*

KEY STATS

63% say it is important that nothing artificial is added to their food.

Source: Bord Bia/Jump! 2018



Life Themes ▶ **Food Themes** ▶ **Bread/Baked Goods Themes**

MY PEOPLE



My friends, my kids, my parents, colleagues, neighbours; awareness of their importance to our lives and well-being is rising.

CONNECTOR



Survival; nourishment; routine; comfort etc Food is a multitasker but its most important - and growing - role is as the best "excuse" for us to come together.

SIMPLE SOPHISTICATION



Where there are people, there is bread; its simplicity and sophistication symbolises mood; occasion; esteem.

People want to savour and share all the good things in life.

jump!

My People | Connector | Simple Sophistication

EVERYDAY UPGRADE

People want to savour and share all the good things in life.

WHAT'S HAPPENING

My friends, my kids, my parents, colleagues, neighbours. Awareness of their importance to our lives and well-being is rising, and we want to make more of that.

LEARNING FOR 'BREAD AND BAKED':

Where there are people, there is bread. Its simplicity and sophistication symbolises mood; occasion; esteem. It can elevate occasions.

The Thinking House

YUM/YUK

70% give *Tomato & Basil Loaf* a 'thumbs up'

Market Evidence

Examples of products meeting this need



Panera Bakery is a US chain famous for their exciting flavours, like their 'French Toast' bagel offering over 10 flavours of crème cheese!



Bella Linea extra wide toaster designed for artisan and home-made bread



Loliware is the first edible cup with Vanilla Bean and Yuzu citrus flavours. They're the 'future of biode(edible).'



Toast Ale uses leftover bread to brew their craft beer.

When?

- Lunchtime Nutrition
- Treat O'Clock
- With Dinner
- Wind Down
- Parties & Occasions

Emerging Trends and Inspiration

- International formats and recipes
- Hybrid creations
- Flavoured bread and bakery
- Storyful brands

Product Characteristics

- Championing craft and producers
- Beautiful
- Specialised flavours
- Single serve portions
- Sweet, Savoury & combined

Starter Opportunities:

- *Enhancing 'hand made' cues e.g. no plastic*
- *Product placement within store*
- *Continental/ hyper-regional baked goods – brioche, sourdough as standard*

Source: Bord Bia/jump! 2018

KEY STATS

40% agree that the bread reflects who I am to others; 39% for baked goods.



Category Trends

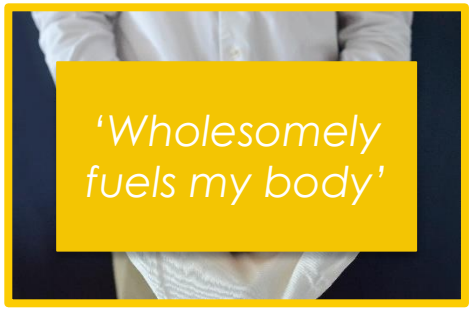
jump!

The Thinking House

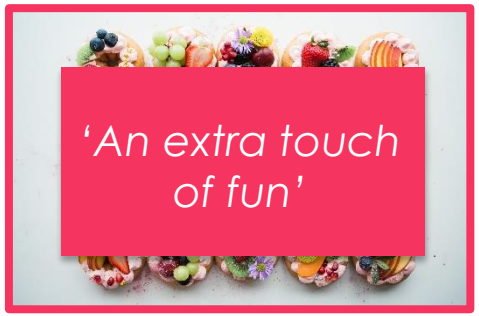
Bord Bia
Irish Food Board

Energies across PRODUCT, PACKAGING and RETAIL shift to meet changing consumer needs.

PRODUCT



NOURISHMENT

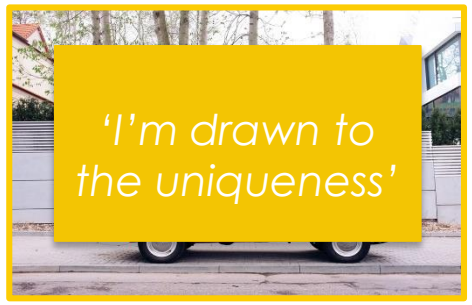


DELIGHT



FIT FOR ME

PACKAGING



CHARM

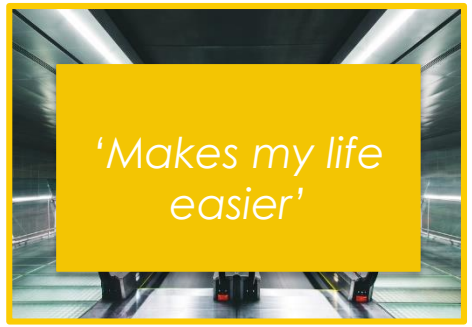


PURPOSE

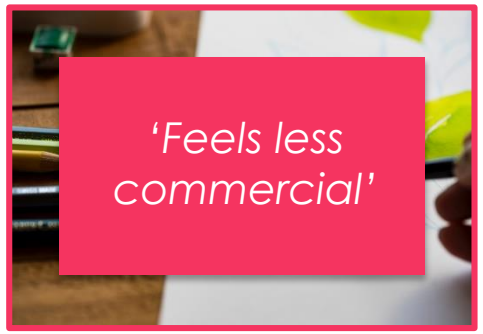


SINCERITY

RETAIL



CONVENIENCE



INTIMACY



MAGIC

jump!

Within each of these energies we have identified a number of trends

PRODUCT

- NATURE'S GOODNESS
- SLOW DOUGH
- BREAD-ER
- EXTRA BOOST

NOURISHMENT

- FLAVOUR FLAIR
- INTERNATIONAL INSPIRATION
- YOUNG AT HEART
- HYBREADS
- EDIBLE ART

DELIGHT

- CROWD PLEASERS
- FLEXI-BAKE
- SNACKABLE BAKERY
- BREAD FOR GOOD

FIT FOR ME

PACKAGING

- PLAYFUL THEATRE
- RETRO
- INGENUITY

CHARM

- MOTHER EARTH
- PHILANTHROPY

PURPOSE

- SENSORY
- SUPER TRANSPARENCY
- MINIMALISM

SINCERITY

RETAIL

- SMOOTH SAILING

CONVENIENCE

- COMMUNITY SPACES
- HANDLED WITH CARE

INTIMACY

- BETTER PERKS
- MULTI-FUNCTION
- PERSONAL TOUCH

MAGIC

Three key areas to watch

PRODUCT

NATURE'S GOODNESS
SLOW DOUGH
BREAD-ER
EXTRA BOOST

NOURISHMENT

FLAVOUR FLAIR
INTERNATIONAL INSPIRATION
YOUNG AT HEART
HYBREADS
EDIBLE ART

DELIGHT

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MULTI-FUNCTION
PERSONAL TOUCH

MAGIC

jump!

NOURISHMENT

SLOW DOUGH

THIS IS ABOUT:
Bread being made using stripped back processes.
This is the **anti-massed produced bread**.

PEOPLE WANT: character, quality, effort

HOW COULD WE?
Shout about the fermentation time of our bread or the proofing time for our pastry?

Instil a sense of craft and care into our messaging and communications. Are we 'real bread?'

The Thinking House

Craft is stretching further. Production time (more of it) signals a better, healthier product.

ESTABLISHED	EVOLVING	EMERGING
		
McCambridges are famous for their Irish **Stoneground** Whole-wheat Bread and remain a favourite.	Stonemill Craft Bakery bread is fermented for four hours for the "**absolute best in class nutrition and taste**" and slow crafted using authentic "European bread-making techniques."	Bageri la Lorraine Pave d'Antan Bread is a stone oven-baked sourdough from Sweden. The **bread is yeasted for 48 hours** for **authentic fermentation**.
• Stoneground wheat • Handmade	• Sourdough • Craft • Hand-milled wheat • Fermentation	• 'Time' as an ingredient • 'Real bread' terminology • Resurgence of people buying and swapping their own sourdough 'starters'

REAL BREAD IRELAND

Real Bread Ireland – a **network of craft bakers** a dedication to the ethos and the craft of bread. Real bread is defined simply as flour, water and fermentation (either yeast or **natural fermentation**), and sometimes salt.

AND BREATHE...

jump!

PURPOSE

MOTHER EARTH

THIS IS ABOUT:
Packaging produced for, or by, the environment –thus emphasising the importance of **preserving the planet's health**.

PEOPLE WANT: less waste, biodegradable, guilt-free

HOW COULD WE?
Remind our consumers the best way to currently recycle our packs

Incorporate natural/compostable materials into our packaging

Pledge to make our packaging kind to our planet

The Thinking House

People are increasingly conscious of the impact of packaging on the environment.

ESTABLISHED



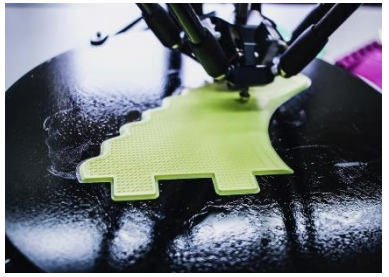
With so many varieties of honey on the market, Bee Bright took an approach that would distinguish them from the rest. **The product is encased in beeswax**– which can also be used as a candle when the honey runs out. Sweet!

- Recyclable & reusable packaging
- Movement towards glass over plastic
- Packaging made from recycled papers & plastics

EVOLVING



Biodegradable coffee cups are quickly becoming an industry standard as consumers are no privy to how much waste they generate. Big brands like Starbucks are under fire for not getting with it.



Martina Green combined **biopolymer and kelp** to produce 3D printed packaging prototypes. The material which can be used as a replacement for plastic, is naturally sourced and biodegradable.

- Biodegradable technology becoming more mainstream
- Use of naturally occurring resources for packaging (i.e. mushrooms, kelp, bamboo)

EMERGING



Sara Wolf and Milena Glimbovski crowd sourced to set up **Berlin's first zero-waste supermarket**. Each product in Original Unverpackt is sold loose, combatting the necessity for bags, wrapping and packaging.

- No packaging, zero waste promises made by brands large and small

GET BETTER

jump!

INTIMACY

HANDLED WITH CARE

THIS IS ABOUT:
Bringing alive the homely qualities of products and display to communicate that the goods were crafted with soul. **This is the antidote to the stifling superstore**.

PEOPLE WANT: familiarity, comfort, curation

HOW COULD WE?
Merchandise our bread and bakery products in a way that feels straight from our home to our consumers' homes?

Use thoughtful touches and beautiful displays to draw people towards the in-store bakery for longer.

The Thinking House

In order to coax shoppers away from their online shopping carts, retailers are simulating the warmth of a domestic setting

ESTABLISHED	EVOLVING	EMERGING



Anthropologie is famous for their creative and cosy store displays. Every nook and is stuffed with homely touches and scented candles. Things are staged so customers can **walk through the store and visualise themselves living in it!**

- Lounge areas in store
- Use of aromatherapy and warm lighting



Many in-store bakeries and convenience stores have rolled out impressive displays evoking the warm feelings of home using **cues such as wood, cake stands, wicker baskets, and chalk boards in their displays.**

- Open kitchen/baker on display
- Chefs and Bakers present in store
- Brand showrooms and galleries
- More greenery/plants in displays



Combatting their associations with mass production. Starbucks launched **'Starbucks Reserve' locations to bring the craft of coffee closer to consumers**. They call them 'immersive, theatrical shrines to coffee passion.'



Muji, Japanese stationary and homeware store recently opened the doors to its **hotel allowing fans to get a step closer to living their Muji dream**. Elements of the décor in each room can also be purchased just by ringing in the front desk.

- Lines between home and retail continue to blur

EVERYDAY UPGRADE


jump!
Loaf Too Big
Any ½ Loaf €2
Spelt soda
The Thinking House
Towards an Innovation Pipeline
Bord Bia
Irish Food Board

TREND

"A DIRECTION IN WHICH SOMETHING IS DEVELOPING OR CHANGING."



Examples of products we tested: seeded loaves, pastries/rolls, flavoured breads, sliced pan breads

TRENDS STICK

FAD

"SOMETHING PEOPLE WILL TRY, BUT IT DOESN'T STICK AROUND FOR LONG."



Examples of products we tested: beetroot/Carrot breads and wraps, Unicorn Toast, Rainbow Bagel, Exotic/Cauliflower collagen wraps

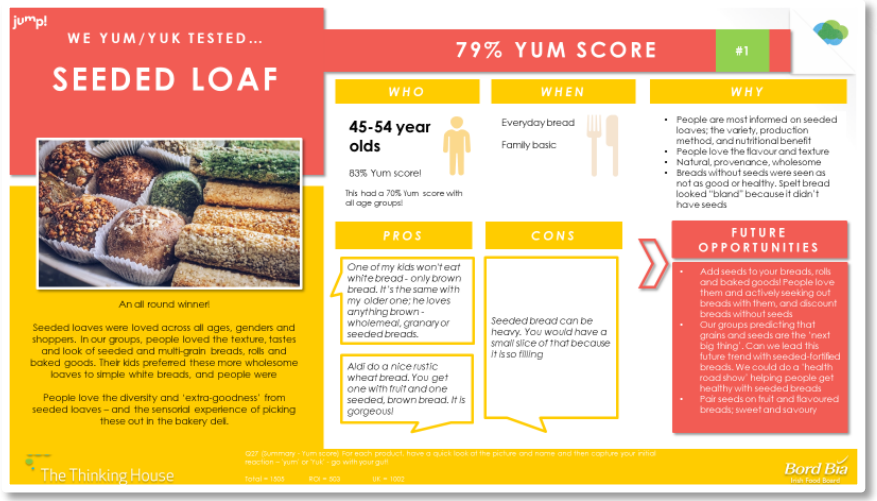
FADS FADE

Yum/Yuk: capturing gut reactions to measure interest in emerging energies.

We showed respondents 20 x products which acted as proxies for the rising energies in the category.

They had just six seconds to give a 'thumbs up' (yum) or 'thumbs down' (yuk) to each.

1. Sliced Pan
2. Insect fortified bread
3. Spelt bread
4. Gluten-free bread
5. High Protein bread
6. 'Cronut' – a croissant and donut hybrid
7. Tomato & basil loaf
8. Beetroot & Carrot bread
9. Bread fortified with vitamin D
10. Grain free bread e.g. using almonds or coconut instead of flour
11. Cinnamon swirl
12. Pecan sticky bun
13. Cauliflower collagen wrap
14. Exotic flavoured wraps e.g. coconut and pepper
15. Seeded loaf
16. Individually wrapped pastry/roll
17. Raspberry croissant
18. Rainbow bagel
19. Unicorn toast
20. Chocolate bread



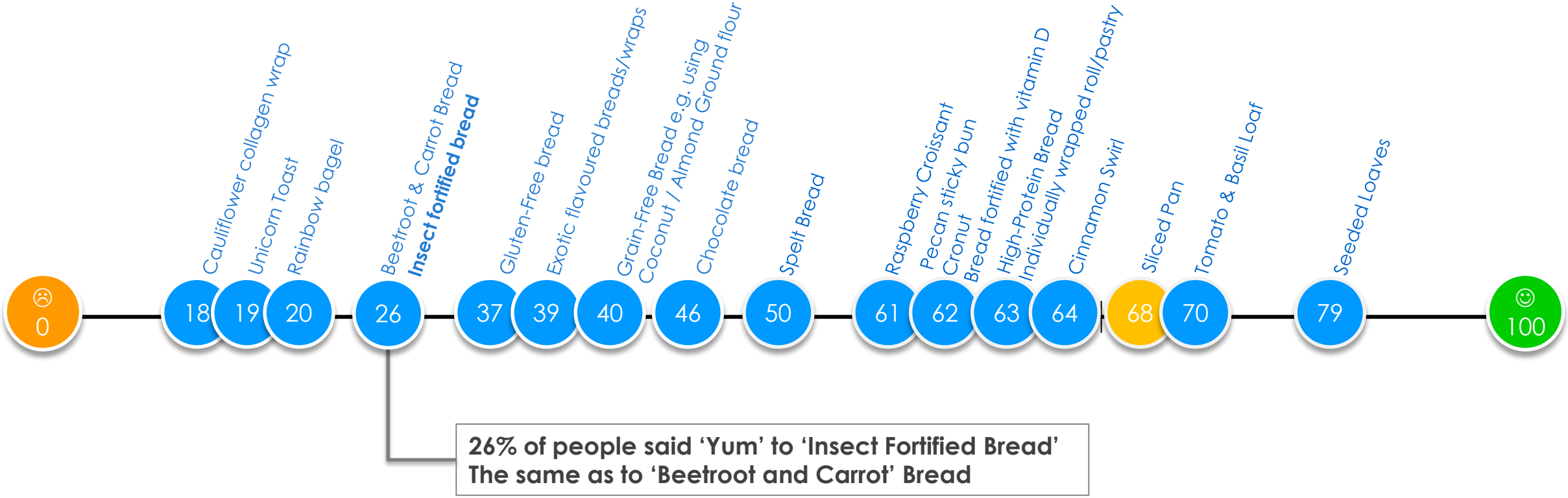


The Yum/Yuk test of 'gut reactions' to ideas.

High '**Yum**' scores show the products with close in innovations (lots of people open to them today).
Low 'Yum' (more '**Yuk**') scores show the products with probably more niche potential, or at the early stages of growth.

'Further Out' Opportunities
Fads
Early Stage Ideas

'Near In' Opportunities
Trends
Well understood and known ideas



26% of people said 'Yum' to 'Insect Fortified Bread'
The same as to 'Beetroot and Carrot' Bread

jump!

WE YUM/YUK TESTED...

SEEDED LOAF



An all round winner!

People really enjoy the diversity and 'extra-goodness' seeds provide – and the sensorial experience of picking seeded products out in the bakery deli.

People we spoke with said that they were more interested in breads with seeds. They prefer the texture, tastes and look of seeded and multi-grain breads, rolls and baked goods. Even their kids enjoy these more wholesome loaves to simple white breads.

79% YUM SCORE

#1

WHO

45-54 year olds

83% Yum score!

Top Yum Product for all our Segments.

WHEN

Everyday bread

Family basic

WHY

- People were most informed about seeded loaves; the variety, production method, and nutritional benefit
- People love the flavour and texture
- Natural, provenance, wholesome
- Breads without seeds were seen as not as good or healthy. Spelt bread looked "bland" because it didn't have seeds

PROS

One of my kids won't eat white bread - only brown bread. It's the same with my older one; he loves anything brown - wholemeal, granary or seeded breads.

Aldi do a nice rustic wheat bread. You get one with fruit and one seeded, brown bread. It is gorgeous!

CONS

Seeded bread can be heavy. You would have a small slice of that because it is so filling

FUTURE OPPORTUNITIES

- Look at adding seeds to your breads, rolls and baked goods.
- People we spoke with thought that grains and seeds could be the 'next big thing' for them. Can we lead this future trend with seeded-fortified breads? We could do a 'health road show' showing people how they could get healthy with seeded breads
- Pair seeds on fruit and flavoured breads; sweet and savoury

jump!

WE YUM/YUK TESTED...

TOMATO AND BASIL LOAF



Flavoured focaccia is really enjoyed as a pre-dinner appetiser with dips, or as a meal accompaniment. People suggested rosemary as another option – but said they avoided packaged products. "They wouldn't be fresh."

Generally these were a popular 'yum' item across demographics. Scored highest in the UK and slightly more among ABC1s.

70% YUM SCORE

#2

WHO

35-44 year olds

77% Yum score!

WHEN

Bakery

Summer bread

Pre-dinner/ Appetisers; dips

WHY

- Smaller bits of bread
- More suitable for the bakery or in-sore deli
- Seasonal associations with summer; eating this outside, BBQ or 'shared meal' occasions
- Pick up in the Aldi, Tesco bakeries

PROS

Very appetising from what it looks like. You would definitely pick it up.

I LOVE focaccia.

The fact it isn't in packaging makes it look fresh.

CONS

I have seen focaccia in Aldi with sundried tomato and things on them. They're in plastic so they wouldn't be fresh. You'd have to heat them up in the oven.

They smell too nice to be healthy. I would say it is terribly unhealthy.

FUTURE OPPORTUNITIES

- Selection offers on our different flavoured focaccias at the deli counter
- Highlight these new deals and flavours with an in store 'taste test'. People have to guess the flavour and then we could offer serving or meal suggestions

jump!

CONTROL PRODCUT WE TESTED...

SLICED PAN



A trusty staple. People spoke with deep nostalgia about slice pan bread; indulgent cheese toasties after school, and having a slice of bread with a warm bowl of soup.

People want sliced pans with more nutritional benefits with wholemeal, multi grain, seeds – or fortified with Protein, Ancient Grains or Vitamin D. They're looking for healthy, everyday convenience.

Sliced pan was most popular in Ireland; especially in shared households (where it had a 90% Yum score.)

68% CONTROL YUM SCORE #3

WHO

35-44 year olds

72% Yum score!

WHEN

Sandwiches

Everyday

Meal accompaniment

WHY

- Pick it up everywhere
- Versatile across different meals, tastes and needs
- Necessity of sliced pan especially in families or large households
- Literal and nostalgic fulfilment

PROS

Bread doesn't last more than a day in my house. I have to buy a sliced pan every day – both white and brown.

I am at the stage now where it would be nice to get Vitamin D from food. My son would be into this and the high protein bread, as he's into the gym and looking after himself.

CONS

Don't eat white bread, it is bad for you!

In the sliced pan they tell you the ingredients. In the loaves you don't know what is actually in them

FUTURE OPPORTUNITIES

- Plain and simple packaging reassures people that this bread is less processed
- Whether bread is packaged or unpackaged, if it feels squidgy and soft, people think its fresh
- Develop your sliced pan ranges with different flavours, added health benefits and shapes/sizes. Vitamin D bread with twists of orange.
- However, don't overcomplicate sliced pans: people like them for their simplicity and convenience

jump!

WE YUM/YUK TESTED...

CINAMMON SWIRL



Cinnamon Swirl's were peoples go-to, tasty sweet treat from the baked good isle. Most spoke about these as their top or favourite pastry flavour.

They were most popular in the UK; families with children; and with students who gave these pastries a 74% Yum score.

64% YUM SCORE

#4

WHO

18-24 year olds

75% Yum score!

Top Scoring Yum Product for all our Segments.

WHEN

Bakery section

Coffee on the go and a pastry

WHY

- Sweet 'pick me up' in morning or afternoon coffee breaks

PROS

Then you are having a sneaky pastry in the garage when you go for petrol!

CONS

Now people are going back to trying to prepare food from scratch.

They're trying to do away with all processed and all the sugary stuff. I suppose so they can have more healthier options.

FUTURE OPPORTUNITIES

- Look at mixing-up these pastries with seeds or nuts on top
- Explore the possibility of complementary flavours and ingredients e.g. crushed almonds on top of cinnamon swirls; orange zest infused cinnamon swirl

jump!

WE YUM/YUK TESTED...

INDIVIDUALY WRAPPED PASTRY/ROLL



These cheap, easy and tasty baked goods are a popular idea with 18-34 year olds, and families with children.

Cinnamon swirls were the top scoring pastry, followed by the cronut and pecan sticky bun.

63% YUM SCORE

#5

WHO

18-24 year olds

68% Yum score!

WHEN

Bakery section

Coffee on the go and a pastry

Pick up a roll with your lunch

WHY

- Individually wrapped rolls help people eat on a the go but still feel fulfilled
- 'Pick me up': literally from a convenient store, but also as a treat or meal accompaniment

PROS

If you go out for breakfast, you have sausage rolls, you have croissants, all the Danishes - they are all so appetising that you now have your 3pm slump at 10am!

I normally buy bread rolls for the kids there.

CONS

I wouldn't have a clue about bagels. I don't know whether wraps, pittas and bagels are healthy or unhealthy.

You have too much finger food from bread ingredients now. Now you have these sugary pastry goods

FUTURE OPPORTUNITIES

- Twist up these pastries and rolls; mash up the top-scoring cinnamon swirl pastry with popular flavours or think about savoury like tomato and basil swirl, sprinkled with rosemary and olive oil.
- A Cinnamon swirl in a cronut or brioche bread that's easy to grab 'n' go.

jump!

WE YUM/YUK TESTED...

HIGH-PROTEIN BREAD



Based on health/well being trends, protein is emerging as an important ingredient and sought after component.

People leant in to read the packaging, and liked the extra nutritional benefits this bread could provide. However, some people at first glance were unsure – "I don't mix protein in my bread. That's not bread!"

This scored best with women– and both frequent wholegrain/multigrain bread buyers.

63% YUM SCORE

#5

WHO

35-44 year olds

65% Yum score!

WHEN

Sports/training programmes

Sandwiches or general bread alternative

WHY

- Understood gym/protein/muscle 'enhancement' this could provide
- Confusion around 'protein' labelling and source; seems unnatural or processed to have 'meat' additives in bread

PROS

I actually do like the sound of that to be honest. Like I know flaxseed is good for you, somebody told me to take it before so I know that.

CONS

If I want protein I will get it elsewhere, I don't want it mixed in my bread.

What kind of protein would be in bread?

FUTURE OPPORTUNITIES

- Clarify and highlight that this bread and its taste is enhanced with natural ingredients which optimises health benefits
- Explore adding seeds/multigrain. Buyers of multi/wholegrain breads and sweet goods are most interested in Protein breads
- Gym connection: work with an advocate/partner with a fitspo blogger to showcase protein bread ranges.

jump!

WE YUM/YUK TESTED...

INSECT FORTIFIED BREAD



Insects are having a moment in the protein/meats market, fine dining and as a bread flour.

Insect bread was 16th on our yum/yuk product list. People are still hesitant to this idea.

Insect-fortified bread was most popular with men; younger age brackets; urban dwellers; and people who shop in Independent stores.

26% YUM SCORE

#16

WHO

25-34 year olds

33% Yum score!

Over 55s least interested, with a 17% Yum score.

WHEN

Alternative bread product

WHY

- "Insects!"
- Unsure what this would taste like, and how it would work across the family or household
- Maybe 'too' natural

PROS

I think some of the stuff will go back to grass roots, you will get artisan places some places saying "we only use the best flour."

CONS

Insects?!

FUTURE THINKABOUTS

- Explore the benefits of insect protein and language which resonates with consumers (e.g. 'cricket' v 'insect') to drive interest, and gauge more appeal.
- "Insect Fortified" may feel too high-brow or trigger a 'yuk' gut reaction!


jump!
Loaf Too Big
Any ½ Loaf €2
Spelt sourdough
Spelt soda
The Thinking House
Bord Bia
Irish Food Board

Summary

Turning Opportunities into reality:
Forge links to create ideas that will inspire you and your target customers.

People's Emotional Needs	People's Functional Needs	Occasions	People 'Types'
I want to feel:	I'm looking for:	Right across the day:	How we differ from others:
Time	Balance	Kick Start	Flyers: We're always in a rush
Balance	Strength	Rise and Shine	Triers: We love new things
Exploration	Taste	Enjoying the day	Reliers: We stick to what we know
Joyful togetherness	No sugar	Lunchtime nutrition	
Get better		Treat O'Clock	
Upgrade		Post activity replenish	
		With Dinner	
		Wind down	
		Brunch	
		Parties/Occasions	

Bord Bia Lifestyle Trends + Bread/Baked Category Trends

Summary - This is a time of positivity and opportunity.

The category is in growth driven largely by increased frequency in shopping and increases in price.

Behind this lies:

1. Changes in people's **eating behaviours** and the rise of **health and snacking**. Think eight eating occasions a day rather than just three.
2. **Category evolution** as people's needs evolve - we are keeping pace and most consumers are enjoying the choice available.

Sliced white, still number one, continues its decline with people switching to a range of breads/'carriers'.

Health and Wellness, along with Balance, beating 'Sugar; Stress; Sedentary [living]', continues to grow in importance and, whilst we're given certain latitude, the game is changing.

The Baked Goods are performing well with key assets of taste; treating and freshness. However, one-quarter of Irish people claim they're going to buy less of the category over the next 12 months.

The challenge here is clear:

1. Keep my attention
2. Can you 'be better' (not 'good', just 'better')
3. Can you tailor to more occasions

Opportunities lie in meeting combinations of people's emotional and functional needs, their eating occasions, and the cluster/segment they belong to for this category.

Key trends under 'Product'; 'Packaging' and 'Retail' offer clues as to:

1. What new ideas we could create
2. What influences we must take note of

Information is the foundation of all of our work here at the Thinking House. So, our way of working is to always put our good thinking in context and give credit where it's due. You can follow our train of thought in the references below.

References:

Kantar Worldpanel. (2018). *Bord Bia – Bakery – Ireland Market Review*

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PROJECT SCARPETTA

Bakery Category Presentation

27th June 2018

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