The Thinking House

BORD BIA INSIGHT CENTRE



Understanding consumer perceptions of Irish stawberries

16th December 2016

Agenda

- **Background**
- Key finding
- Consumer trends
- Strawberry behaviour
- Perceptions of Irish strawberries
- Communications
- Recommendations

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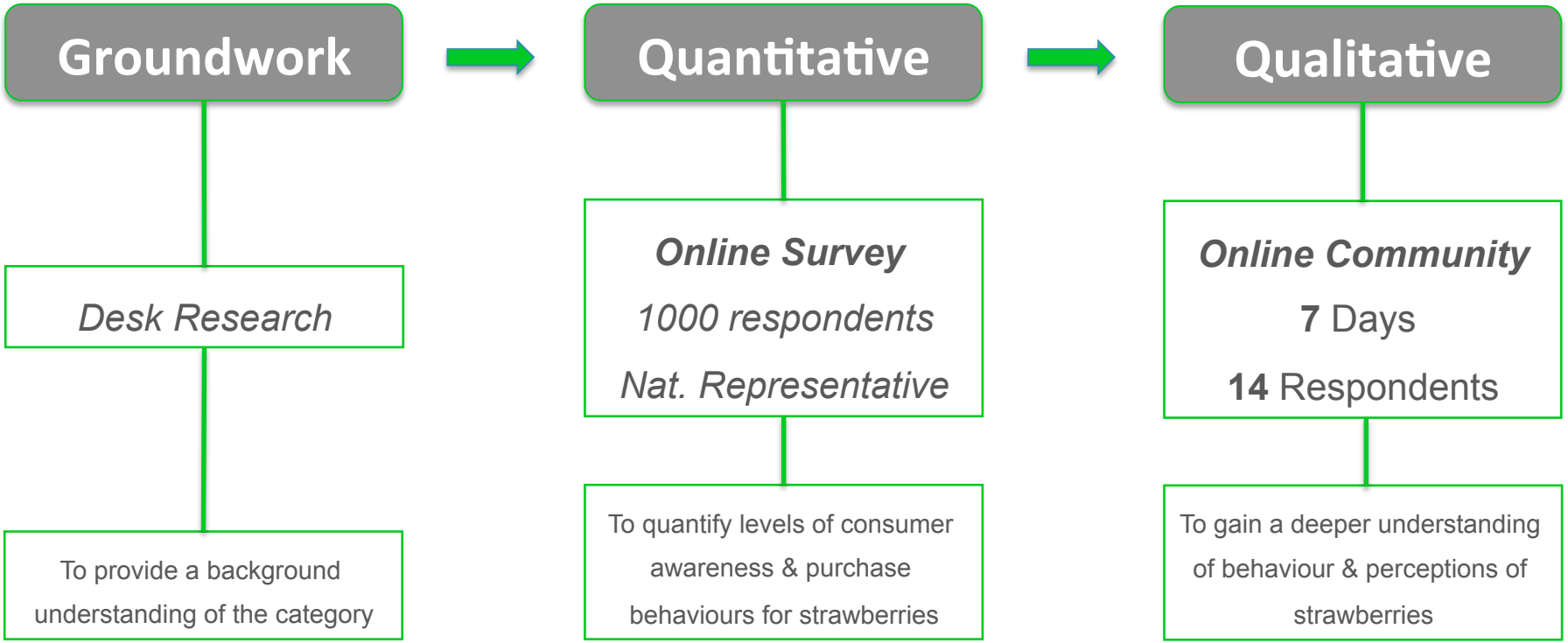
Objective



To understand consumer perpceptions of Irish grown strawberries

Methodology



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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



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Differences in life stage but similar attitudes prevailed around



Strawberry behaviour

Perception of Irish strawberries

Anticipation of Season

Key finding

Strawberries are a very emotive fruit, consumers await the new season with **anticipation**

There are **opportunity** areas in targeting particular demogrpahics so as to encourage & drive consumption

Health messaging provides an opportunity to have a **new** conversation with consumers

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Health & Wellbeing



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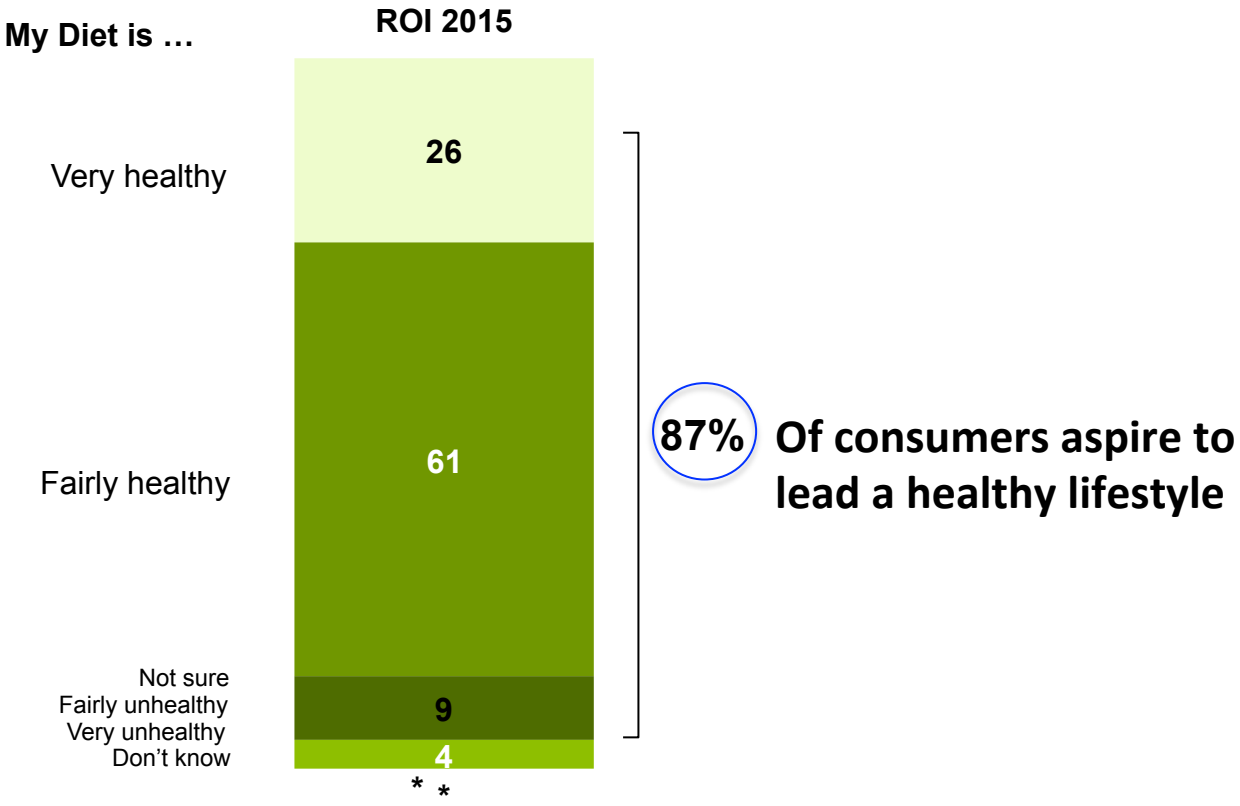
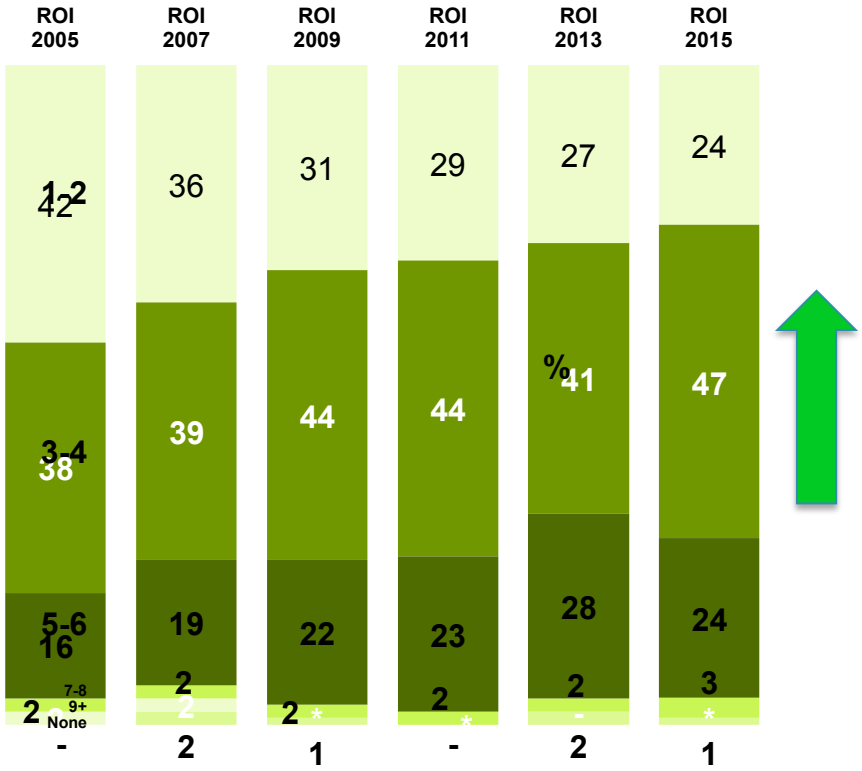
Diet perceptions



Source; PERIscope 2015

Fruit & Veg consumption

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



Increase in the number of consumers who are increasing their intake of portions of fruit & veg

Source; PERIscope 2015

Keeping it Real



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Keeping it Real

Naturally authentic

Desire for products that are 'as nature intended'



Genuine provenance

Provenance becoming the ultimate marker of quality



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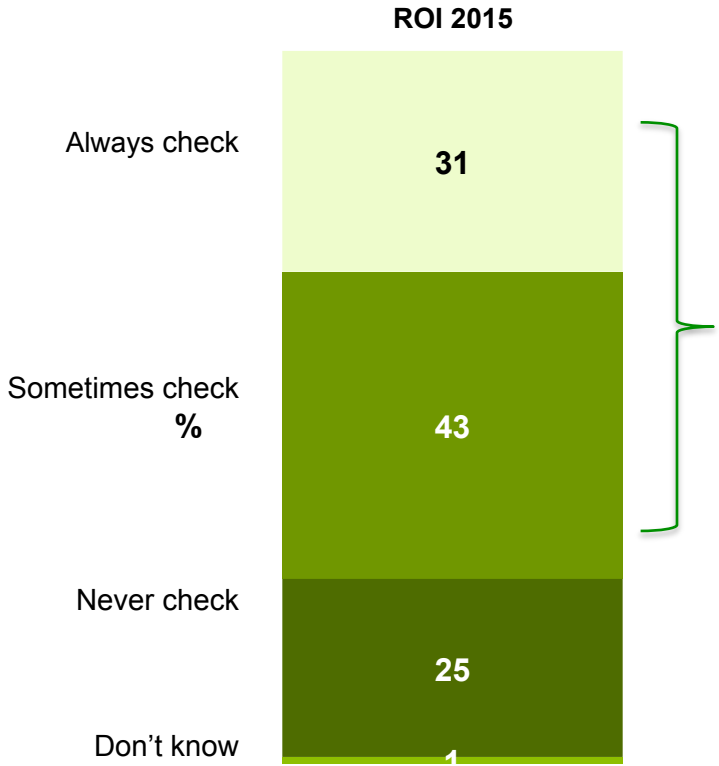
Origin labels

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

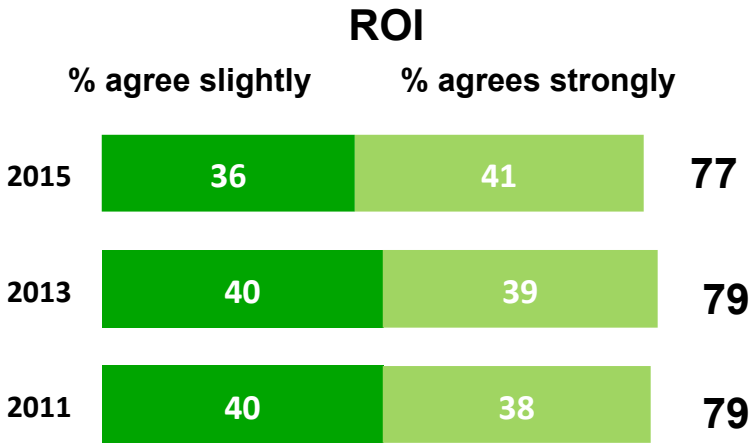


3 in 4 consumers sometimes or always check for country of origin labels

Source; PERIscope 2015

Quality

Quality of fresh food is more important than price



Source; PERIscope 2015

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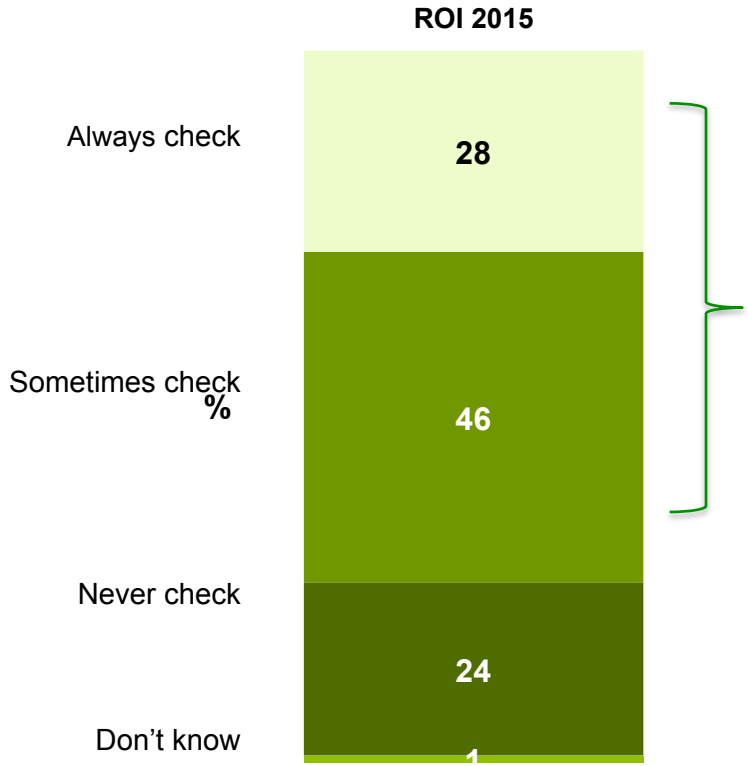
Quality Labels

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



3 in 4 consumers sometimes or always check for country of origin labels

Source; PERIscope 2015

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Strawberry consumption

94% of all adults claim to eat strawberries.

The average annual consumption is **49** times per year.



Source; Quantitative Omnibus Nov 16

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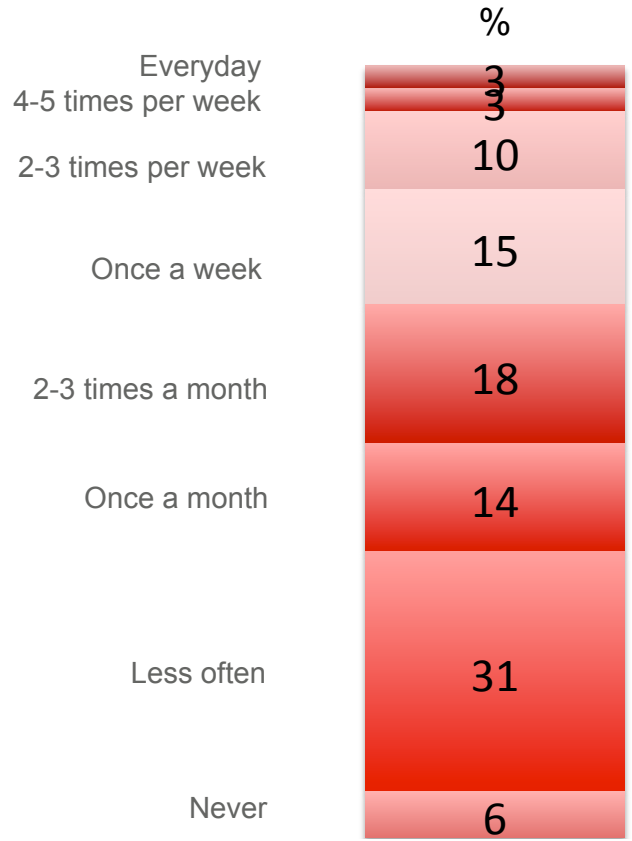
Frequency of eating strawberries



Qs. How often do you eat strawberries?

Source; Quantitative Omnibus Nov 16

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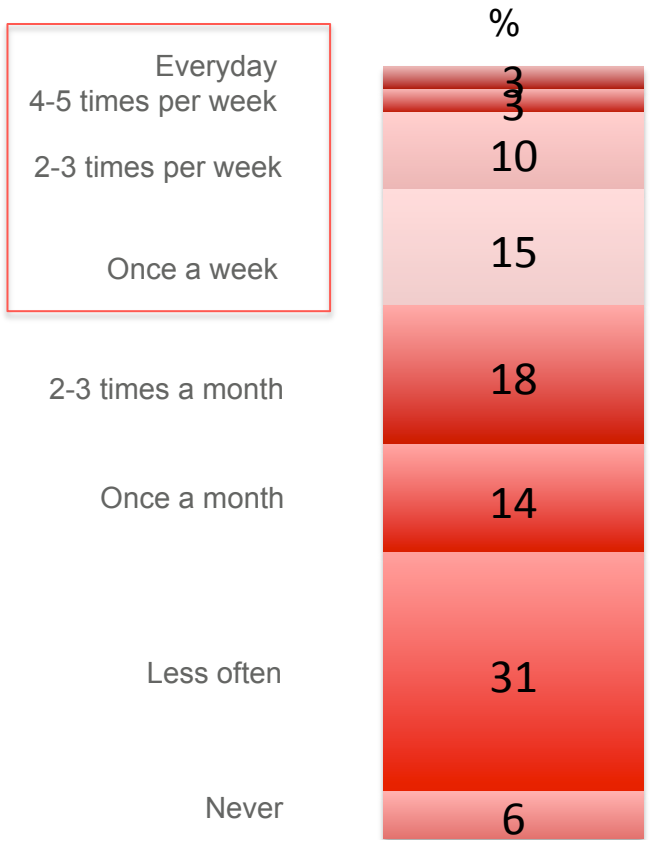
Regular consumers



31% of consumers

Regular eaters are those eating weekly.

They represent just under **1 in 3** consumers.

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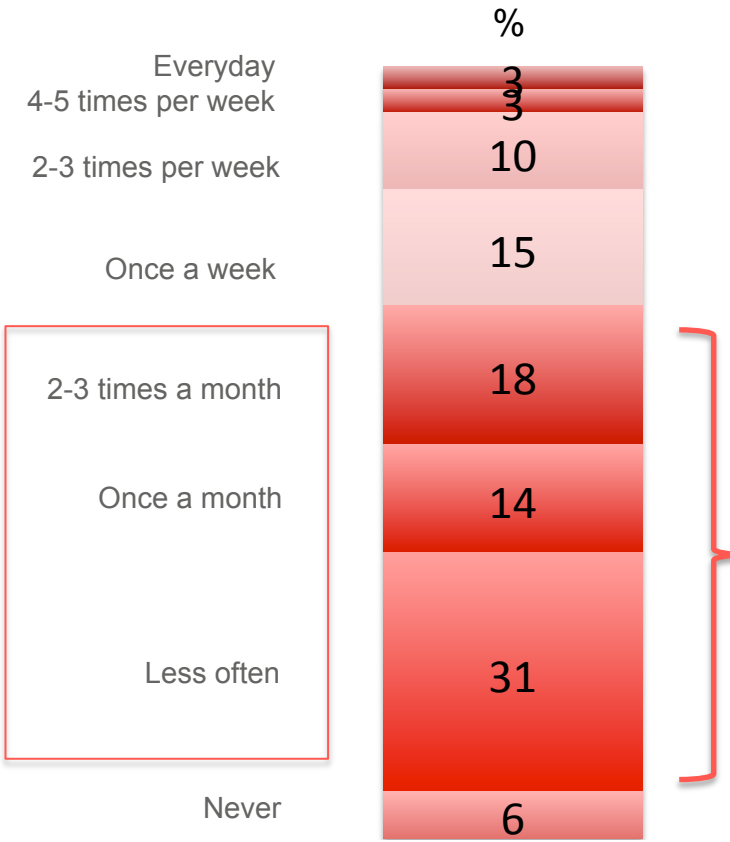
Source; Quantitative Omnibus Nov 16

Occasional consumers



Occasional eaters are those less often.

They represent just under **3** in **5** consumers.

63% of consumers

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Source; Quantitative Omnibus Nov 16

Who is eating strawberries?

%	Total	Gender		Age					Region			
	Total	Male	Female	18-24	25-34	35-44	45-55	55+	Dublin	RoL	Mun	Con/ Uls
Everyday	3%	2%	4%	4%	4%	3%	1%	2%	3%	3%	3%	1%
4-5 times per week	3%	2%	3%	5%	2%	3%	-	3%	2%	3%	1%	4%
2-3 times per week	10%	10%	11%	8%	12%	9%	9%	12%	11%	8%	14%	8%
Once a week	15%	14%	16%	12%	15%	20%	13%	12%	15%	13%	15%	15%
2-3 times a month	18%	16%	20%	20%	22%	19%	17%	15%	17%	18%	19%	20%
Once a month	14%	16%	12%	16%	11%	18%	13%	13%	12%	15%	14%	17%
Less often	31%	34%	28%	24%	28%	23%	37%	39%	34%	31%	29%	30%
Never	6%	6%	6%	11%	6%	5%	10%	4%	6%	9%	5%	5%
Regular Eaters	31%	28%	34%	29%	33%	35%	23%	29%	31%	27%	33%	28%
Occasional Eaters	63%	66%	60%	60%	61%	60%	67%	67%	63%	64%	62%	67%
Average Consumption p.a.	49	43	55	58	56	51	36	47	52	50	51	41

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%	Total	Gender		Age					Region			
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Once			12%	16%	11%	18%	13%	13%	12%	15%	14%	17%
Les			28%	24%	28%	23%	37%	39%	34%	31%	29%	30%
N			6%	11%	6%	5%	10%	4%	6%	9%	5%	5%
Regular Eaters	31%	28%	34%	29%	33%	35%	23%	29%	31%	27%	33%	28%
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Females are more likely to consume strawberries than males

Who is eating strawberries?

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2-3 times per week					12%	9%	9%	12%	11%	8%	14%	8%
Once a week					15%	20%	13%	12%	15%	13%	15%	15%
2-3 times a month	18%	16%	20%	20%	22%	19%	17%	15%	17%	18%	19%	20%
Once			12%	16%	11%	18%	13%	13%	12%	15%	14%	17%
Les			28%	24%	28%	23%	37%	39%	34%	31%	29%	30%
N			6%	11%	6%	5%	10%	4%	6%	9%	5%	5%
Regular Eaters	31%	28%	34%	29%	33%	35%	23%	29%	31%	27%	33%	28%
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Those aged **18-34 year olds** consume the most amount of strawberries annually

Females are more likely to consume strawberries than males

Who is eating strawberries?

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	Total	Male	Female	18-24	25-34	**35-44**	45-55	55+	Dublin	RoL	Mun	Con/ Uls
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4-5 times per week	3%	2%	3%	5%	2%	3%	-					
2-3 times per week					12%	9%	9%					
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Once			12%	16%	11%	18%	13%	13%	12%	15%	14%	17%
Les			28%	24%	28%	23%	37%	39%	34%	31%	29%	30%
N			6%	11%	6%	5%	10%	4%	6%	9%	5%	5%
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Average Consumption p.a.	49	43	55	58	56	51	36	47	52	50	51	41

1 in 5 consumers aged 35-44 years old consume strawberries at least once a week

Those aged **18-34 year olds** consume the most amount of strawberries annually

Females are more likely to consume strawberries than males

Who is NOT eating strawberries?

%	Total	Gender		Age					Region			
	Total	Male	Female	18-24	25-34	35-44	45-55	55+	Dublin	RoL	Mun	Con/ Uls
Everyday	3%	2%	4%	4%	4%	3%	1%	2%	3%	3%	3%	1%
4-5 times per week				%	2%	3%	-	3%	2%	3%	1%	4%
2-3 times per week				%	12%	9%	9%	12%	11%	8%	14%	8%
Once a week				%	15%	20%	13%	12%	15%	13%	15%	15%
2-3 times a month	18%	16%	20%	20%	22%	19%	17%	15%	17%	18%	19%	20%
Once a month	14%	16%	12%	16%	11%	18%	13%	13%	12%	15%	14%	17%
Less often	31%	34%	28%	**24%**	**28%**	23%	37%	39%	34%	31%	29%	30%
Never	6%	6%	6%	11%	6%	5%	10%	4%	6%	9%	5%	5%
Regular Eaters	31%	28%	34%	29%	33%	35%	23%	29%	31%	27%	33%	28%
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1 in 4 consumers aged **18-34** are consuming strawberries less often than on a monthly basis

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4-5 times per week					2%	3%	-	3%				
2-3 times per week					12%	9%	9%	12%				
Once a week					15%	20%	13%	12%				
2-3 times a month	18%	16%	20%	20%	22%	19%	17%	15%				
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Less often	31%	34%	28%	24%	28%	23%	**37%**	**39%**	34%	31%	29%	30%
Never	6%	6%	6%	11%	6%	5%	10%	4%	6%	9%	5%	5%
Regular Eaters	31%	28%	34%	29%	33%	35%	23%	29%	31%	27%	33%	28%
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Average Consumption p.a.	49	43	55	58	56	51	36	47	52	50	51	41

1 in 4 consumers aged **18-34** are consuming strawberries less often than on a monthly basis

Almost **4 in 10** consumers aged **45-55+** are consuming strawberries less often than on a monthly basis

Why are they consuming?

Taste

The core benefit to strawberries is the taste. They are sweet & juicy and seen as treat. Strawberries are a crowd pleaser.



Why are they consuming?

Versatility

Strawberries are versatile in their usage, they can be used as a stand alone eat, an ingredient, a topping or a dessert.



Stand alone eat



Ingredient



Topping



Dessert

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Why are they consuming?

Occasion

They are fluid throughout the day. Suited to breakfast, mid-morning/afternoon snacks, lunch accompaniment, main meal dessert, evening snack.



Snack





Breakfast

Porridge
Yoghurt
Muesli/Granola



Dessert

With Cream
Cakes
Weekend baking

Why are they consuming?

Health

Understood to be 1 of your 5 a day. Specifics aren't known but they are expected to contain beneficial vitamins & minerals.

Strawberries are also about boosting the health credentials of a dish. Using as a topping for the likes of porridge, muesli/granola, yoghurt or a fruit salad



Why are they consuming?

Multi-buys

Whilst strawberries can be viewed as an expensive fruit, consumers understand them to be always available as part of a multi-buy

Multi-buy offers encourage higher volume consumption. They represent value because it is a fruit that is perceived to be expensive & one that gets eaten very quickly.

Negatives to strawberries

Cost

The main negative is they are understood to be one of the more expensive fruits

Shelf life

They are understood to have a short shelf life & go off quite soon after purchase

Delicate

Soft fruit can damage or bruise quite easily which negates portability benefits

Purchase behaviour

A punnet of strawberries will typically last no more than two days. They have a perceived short shelf life and because they are so tasty, they don't last long.

Those consumers we spoke to, purchased 1-2 punnets per week. Never any more due to the fact that multi-buy offers are typically for two items/punnets.

> *I buy two (punnets) because one is not enough*
>
> *Triona*

Small pots are purchased as a sweet treat or on the go snack.

The trays are purchased for the office fridge or for picnics/car journey in summer. These are convenient pack formats.



Price for punnet

€2.50  €3.50

Consumers report that they expect to pay between €2.50 to €3.50 per punnet of strawberries. This price reflects a typical 227gram plastic punnet.

Price is perceived to vary depending on their availability or seasonality.

They can be expensive depending on availability or seasonality

Donal, 48

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Multi-buys



However, as we have mentioned, multi-buy offers are frequently engaged with.

The consumer perceives that these are good value and will increase their volume to two punnets for €5. Awareness of the Keelings 2 for €5 multi-buy offer is very high.

The value comes from the fact that they are tasty and get eaten very quickly and are enjoyed by the crowd.

I always buy the multi-buy offers especially on strawberries because it's the fruit that we use the most of

Jonathon

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Packaging

Packaging formats are understood to be the same across all brands and retailers. The punnet is the most prominent format, followed by trays or pots.

The packaging is the same as far as I'm aware

Donal, 48





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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 & 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. Consumers are more likely to purchase fruit from this channel when it is in season.

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.**

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.

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.

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.

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.

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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.

	% 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

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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Origin is a by-word for fresh

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

For strawberries, I like to buy them locally sourced for them to be as fresh as possible, they go bad quickly most of the time so to get the best out of them I Like them to be grown close by!

Louise

I would expect Irish strawberries to taste fresh as they don't have to travel or be kept in cold storage

Joan, 46

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Origin is also a by-word for health

Local or Irish strawberries are deemed to be **healthier** because they spend less time in storage on account of less distance to travel.

The longer the time spent from when the fruit was picked, the quicker the degeneration of the nutritional value

Jacqualine

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Irish strawberry associations

We asked them how they would describe an Irish strawberry;

Taste	Sweet, Juicy, Refreshing
Visual	Shiny & red
Size	Large, big, plump
Availability	Taste improves even further in summer

I think we have excellent quality strawberries, especially in summer

Niamh

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Irish strawberries

Consumers list Keelings & Wexford as being the main types of Irish strawberries.

I mainly get Keelings strawberries as they are easy to access & always in stock in Dunnes Stores

Nicky

The only place to buy Wexford is at the side of the road (as far as I know)

Triona

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Anticipation for season

There is a strong emotional sentiment to the Irish strawberry season. They provoke nostalgic associations with family days out in summer or strawberries & cream on a summer's day.

Irish strawberries represent a sunny Irish family day out

Elaine



Consumers look forward to the strawberry season as they get to experience this happiness again and remind themselves of childhood memories

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Campaigns

We asked our consumers if they could recall seeing a campaign advertising or promoting strawberries.

There were some mentions of campaigns by Keelings promoting their fruit and berries in particular but that was the extent of any further campaign 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 an opportunity to engage in campaign or promotional activity.

Seasonality

There is a basic level of consumer understanding for the Irish strawberry season.

Consumers can 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 3-6 months during the summer from May onwards.

They understand seasonality as a result of the prominence of the roadside carts selling strawberries during the summer and also the nostalgia of eating strawberries & cream in hotter weather.

As a guess & seeing people selling at the side of the road, I would have to say strawberry season in Ireland would be May to July

Jonathon

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The blurring of Seasonality

However, there is also a blurring of seasonality for consumers today.

This is because they think that they can access Irish strawberries all year round. Keelings in particular are driving this assumption.

Irish strawberries are available for most of the year, they used to just be (available) in the summer season

Niamh

Isn't this (season) all year round as they are kept indoors in controlled conditions...but they are more plentiful in spring & summer

Donal, 48



Health

Consumers understand strawberries to be 1 of your 5 a day & good for you due to vitamins & minerals.

When communicating further health benefits to consumers, it is evident that there is a low awareness & understanding of these benefits. This is because strawberries are predominantly about taste & enjoyment.

We showed consumers the following benefits;

- Vitamin K, manganese
- Omega 3
- Dietary Fibre
- Antioxidants

- One cup = **136%** of your Recommended Daily Allowance (RDA) of **Vitamin C**

I was not aware, I would be interested in reading up more about them

Nicky

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Health

However, once presented with further information, interest significantly increases as does aspiration to continue to purchase or consume more frequently. The vitamin C content in particular, is highly motivating.

The amount of vitamin C they contain is very high and something that I will definitely keep in mind for the future

Niamh

I would consider fibre to be important, as Iworry that my children don't enough of it

Triona

I will continue to buy more Irish strawberries now because of the nutritional content

Jacqualine

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Sustainability

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

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

Strawberries 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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Driving Consumption

Consuming less often than on a monthly basis

1 in 4 consumers aged **18-34**

Almost **4 in 10** consumers aged **45-55+**

There is a high number of consumers who consume strawberries much more infrequently than others. In order to drive volume and value we should be looking to new target markets.

These two consumer groups represent an opportunity target market for which we should aim to encourage consumption.

Health could be a key message here to drive consumption...



Health messaging

As we have alluded too, the health benefits of strawberries are widely unknown. They instead represent taste & emotion through an enjoyable or nostalgic eating experience.

To drive further volume by consumption, health messaging should be communicated so that we educate the consumer to all of the nutritional value.

It's a top of mind consideration so we can further develop the benefits of strawberries in the mind of the consumer.

A campaign or communications around health should provide a compelling reason to consume and encourage further support, as echoed by our online consumers.



Best in Season

Taste, Freshness & **Health** are key associations with Irish summer strawberries that are in season.

Locally produced strawberries are perceived to be the best tasting as they are sweet, juicy and plump. They are also deemed to be much fresher because because they haven't travelled as far as imported.

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 strawberries and encouraging consumers to purchase.

Due to their versatility, consumers can find many uses during the season.





Emotional messaging

Strawberries evoke pleasant emotions focusing on the nostalgia of summertime and childhood.

Is there an opportunity to build in emotional messaging to a campaign or promotional activity, reminding consumers of family days out, picnics, strawberries & cream in the sun e.t.c.



The Thinking House

New pack formats

Strawberries are understood to arrive in the same consistent pack format, the plastic punnet.

To create excitement within the category and offer a point of differentiation, are there new pack formats that could be explored?







The Thinking House


Thank you

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Understanding consumer perceptions of Irish stawberries

16th December 2016