



The Thinking House

BORD BIA INSIGHT CENTRE

Agenda

08.10 Welcome & Intro

08.15 Third Age of Consumption

08.45 Culinary Inspiration - Storytelling

09.15 Understanding Snacking in Ireland and UK

10.00 The Thinking House – 2018 Update

10.30 Q&A / Close

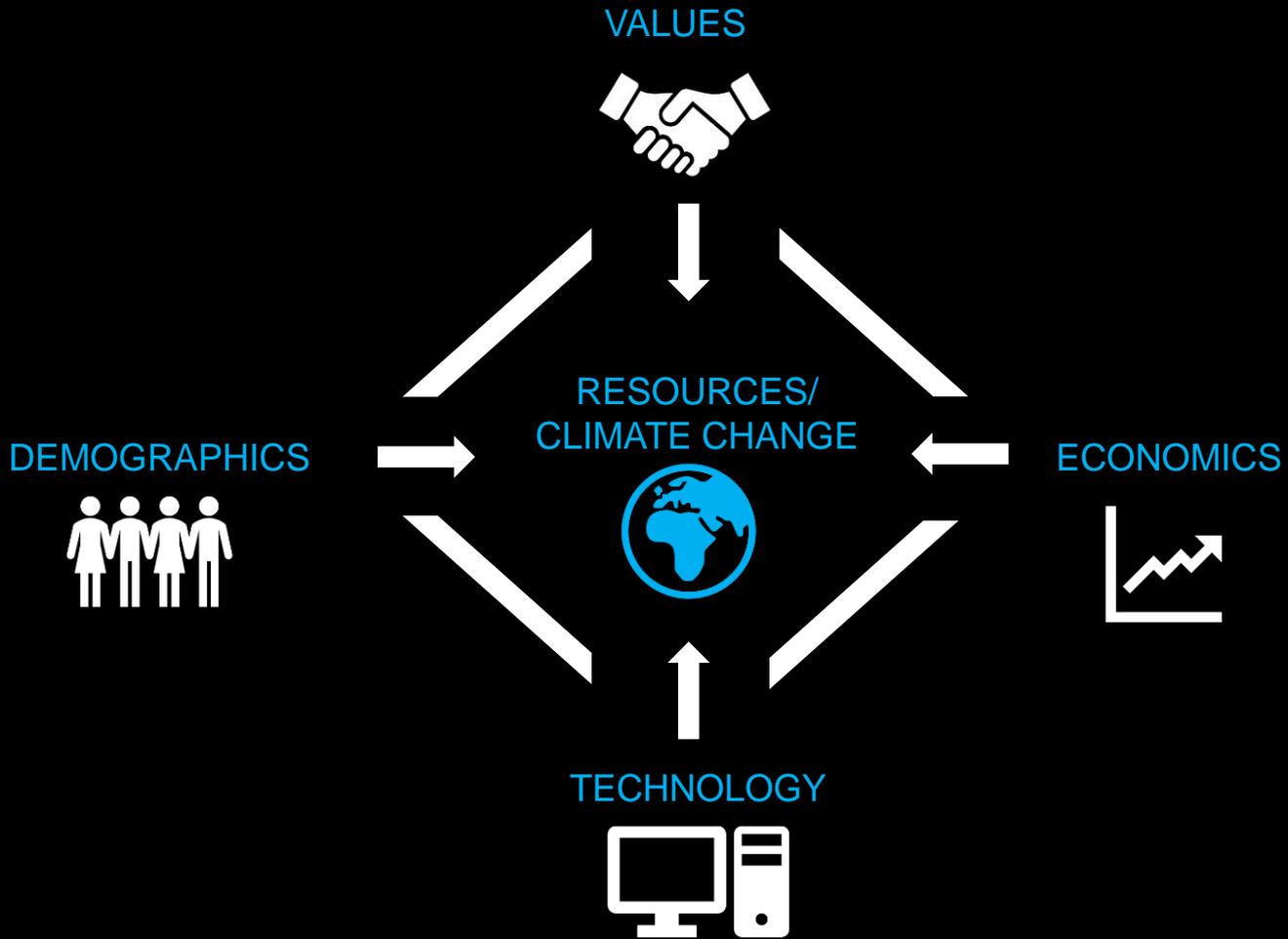


THE THIRD AGE OF CONSUMPTION

JOE BALLANTYNE

THE FUTURE





-25%



THE OLD WAYS NO
LONGER WORK

**WELCOME TO
THE THIRD AGE OF
CONSUMPTION**

THE FIRST
AGE WAS AN
AGE OF
LUXURY.
(1650 TO
~1850)



THE
SECOND
AGE
EMERGED
WITH THE
RISE OF THE
FIRST
DEPARTMEN
T STORE.
(1850 TO
~2000)



WELCOME
TO THE
THIRD AGE.
(2000 - ?)



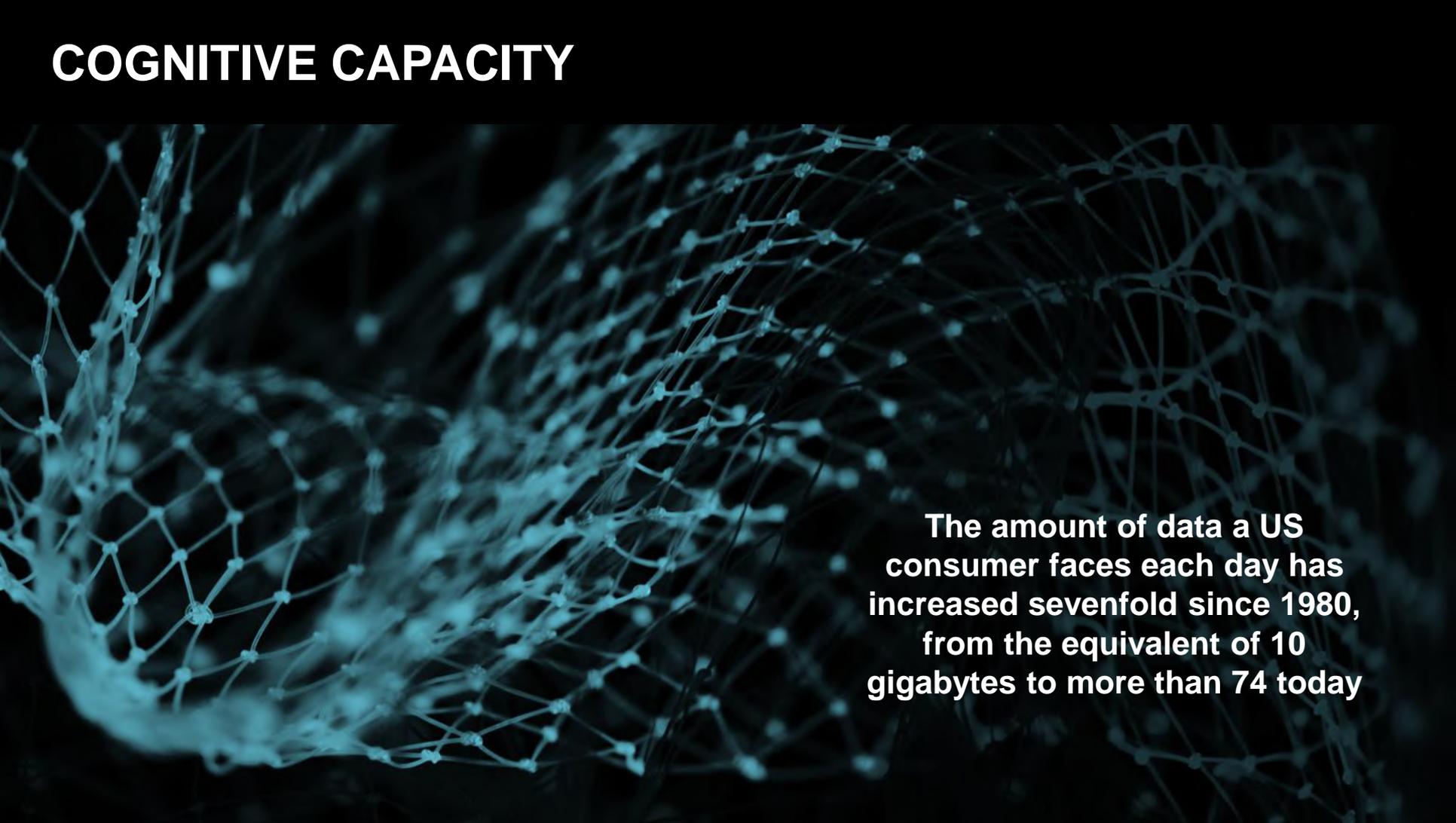


LIVE LARGE
CARRY LITTLE



**THE CHALLENGES
OF CAPACITY**

COGNITIVE CAPACITY



The amount of data a US consumer faces each day has increased sevenfold since 1980, from the equivalent of 10 gigabytes to more than 74 today

ECONOMIC CAPACITY



**Declining population growth
means a 40% drop in annual
GDP growth over the next
half-century for the G19
markets + Nigeria**

RESOURCE CAPACITY

Climate change is putting significant pressure on the biosphere. 60% of all species of life have disappeared in the past 50 years

COGNITIVE CAPACITY



ECONOMIC CAPACITY



RESOURCE CAPACITY



FINDING **GROWTH** IN THE
CONTEXT OF CAPACITY

EXPERIENCES

ALGORITHMS

**A NEW
E.R.A.**

RELATIONSHIPS

90% of people believe that taking
prioritising

EXPERIENCES

over material possessions is important in
their personal life





92% of people believe that taking the time
to nurture one on one

RELATIONSHIPS

is important in their personal life

ALGORITHMS

87% of people believe that having products and services that can anticipate your needs is important in personal life

```
3 require File.expand_path("../..", __FILE__)
4 # Prevent database truncation if the environment is production
5 abort("The Rails environment is running in production")
6 require 'spec_helper'
7 require 'rspec/rails'
8
9 require 'capybara/rspec'
10 require 'capybara/rails'
11
12 Capybara.javascript_driver = :webkit
13 Category.delete_all; Category.create(:name => "Category")
14 Shoulda::Matchers.configure do |config|
15   config.integrate do |integrate|
16     with.test_framework :rspec
17     with.library :rails
18   end
19 end
20
21 # Add additional requires below this line. Requires are not required to be
22 # in this order.
23 # Requires supporting ruby files with support for Capybara.
24 # spec/support/ and its subdirectories. Files matching *_spec.rb are
25 # in _spec.rb will both be required as well as the *_spec.rb file.
26 # run twice. It is recommended to use the *_spec.rb file.
```

EXPERIENCES

**MANAGE
EMOTIONAL
VALUE**

ALGORITHMS

**MANAGE
SPEED**

A NEW
E.R.A.

**MANAGE
LIFETIME VALUE**
RELATIONSHIPS

EXPERIENCE S: MANAGE EMOTIONAL VALUE



RELATIONSHIPS : MANAGE LIFETIME VALUE



**IF IT'S
BROKE,
FIX IT!**

WORN WEAR

• REPAIRS •

Patagonia SoHo
72 Greene St

patagonia

ALGORITHMS: MANAGE CONVENIENCE



EXPERIENCES

**MANAGE
EMOTIONAL
VALUE**

ALGORITHMS

**MANAGE
SPEED**

A NEW
E.R.A.

**MANAGE
LIFETIME VALUE**
RELATIONSHIPS

THERE'S POWER IN
THE COMBINATION

The Daily Telegraph

NEWS SPORT NRL ENTERTAINMENT OPINION BUSINESS LIFESTYLE RE

Death of the bookshop?

Duncan Lay, The Sunday Telegraph
August 4, 2012 3:00pm

IF the collapse of Borders and Angus & Robertson stores was written up as a whodunnit, it would open with a suspicious death, triggering a dramatic series of events that threaten to end in a bloodbath.

Or written as science fiction, it would be set i
bestsellers are free and everyone is a genius.

Sites ABC

NEWS

Just In Politics Australia World Business Sport Science Arts Analysis

Print Email Facebook Twitter More

Internet spells the death of bookstores

Peter Lloyd
Updated 21 Feb 2011, 12:11am

Book giants Borders and Angus & Robertson are not the only ones in trouble, with the internet sucking the life from many independent bookstores around Australia. As many as 200 Angus & Robertson and Borders bookstores could be sold off or closed with the prospect of thousands of job losses after parent company, REDgroup Retail, was placed in voluntary administration. A debt mountain, the growing popularity of online book

formats are behind the chains' small bookshops are also going

ing numbers, with at least six

ndently owned small size

in New South Wales in the

popular Zabriske Booksellers

beachside suburb of Bondi

mark for 20 years. But owner



PHOTO: Booksellers complain that Australian publishers who set prices have been too slow to respond to the slump in sales. (AFP)

AUDIO: Angus and Robertson and Borders go under (AM)

RELATED STORY: Bookstore giant Borders files for bankruptcy

THE IRISH TIMES

NEWS SPORT BUSINESS OPINION LIFE & STYLE CULTURE

Books > Book Reviews | The Book Club | Women Writers | Poetry | Hennessy NIW | IT

Death of a bookshop

John McEvoy reflects on his 20 years running the Crannóg Bookshop in Cavan town, the role it played in a cultural revival and as a community hub, and its most famous visitor

© Thu, Mar 9, 2017, 17:20

John McEvoy



NETFLIX

amazon

The number of independent bookshops in the US has risen by **41%** in the past 6 years



NETFLIX

amazon



Rayha®



WELCOME TO THE
RAPHA CYCLING CLUB
COPENHAGEN





Rapha. FESTIVE 500



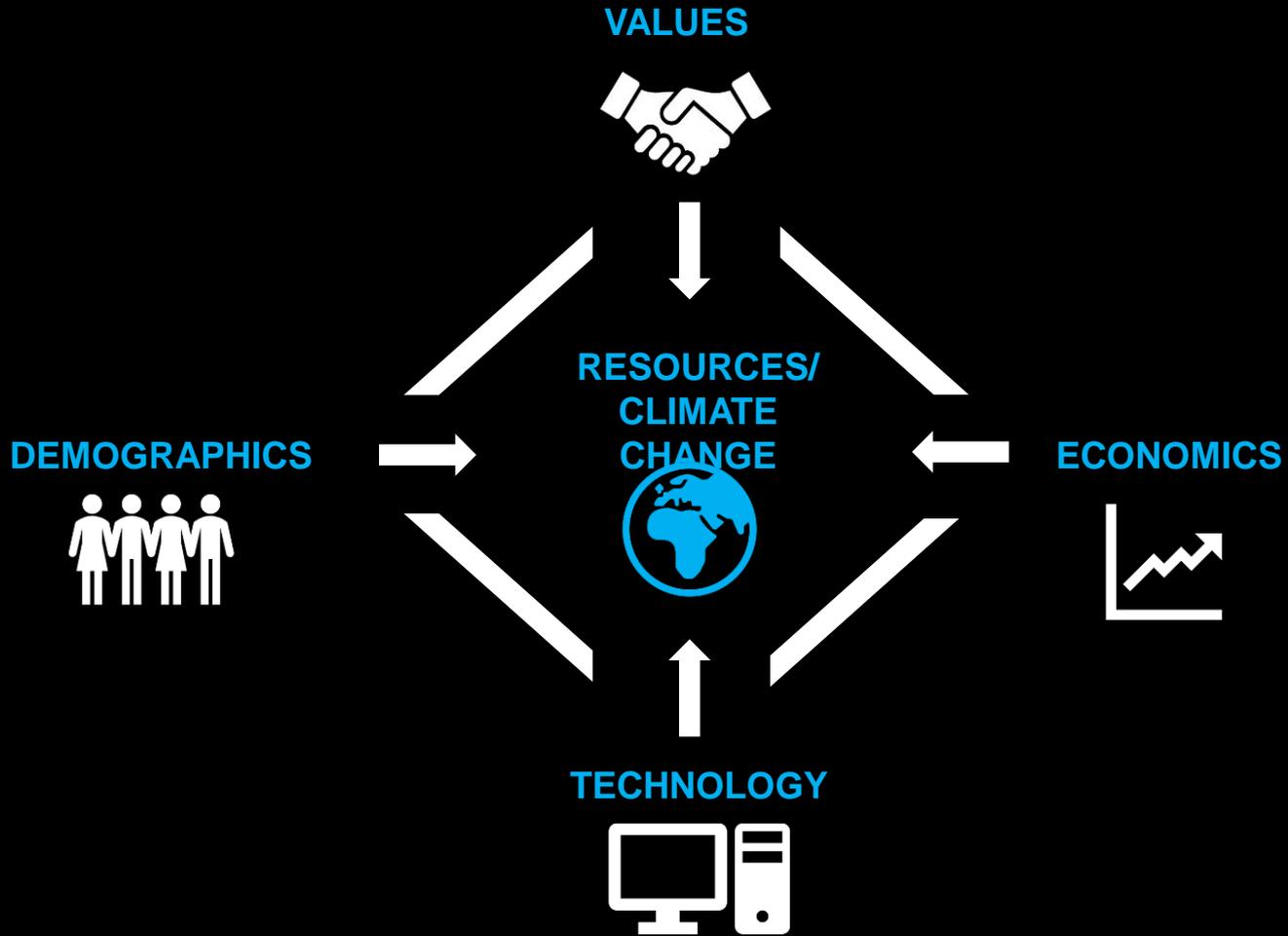
EXPERIENCES



RELATIONSHIP



ALGORITHMS



VALUES



RESOURCES/
CLIMATE
CHANGE



- 1) Does enough of your value proposition come from experiences, relationships and/or algorithms?
- 2) Are you reaping competitive advantage via reducing your resource impact?
- 3) Do you have a clear view of the future of your categories, businesses and brands in the coming E.R.A.?



THANK YOU

JOE BALLANTYNE



The Thinking House

BORD BIA INSIGHT CENTRE

Culinary Inspiration

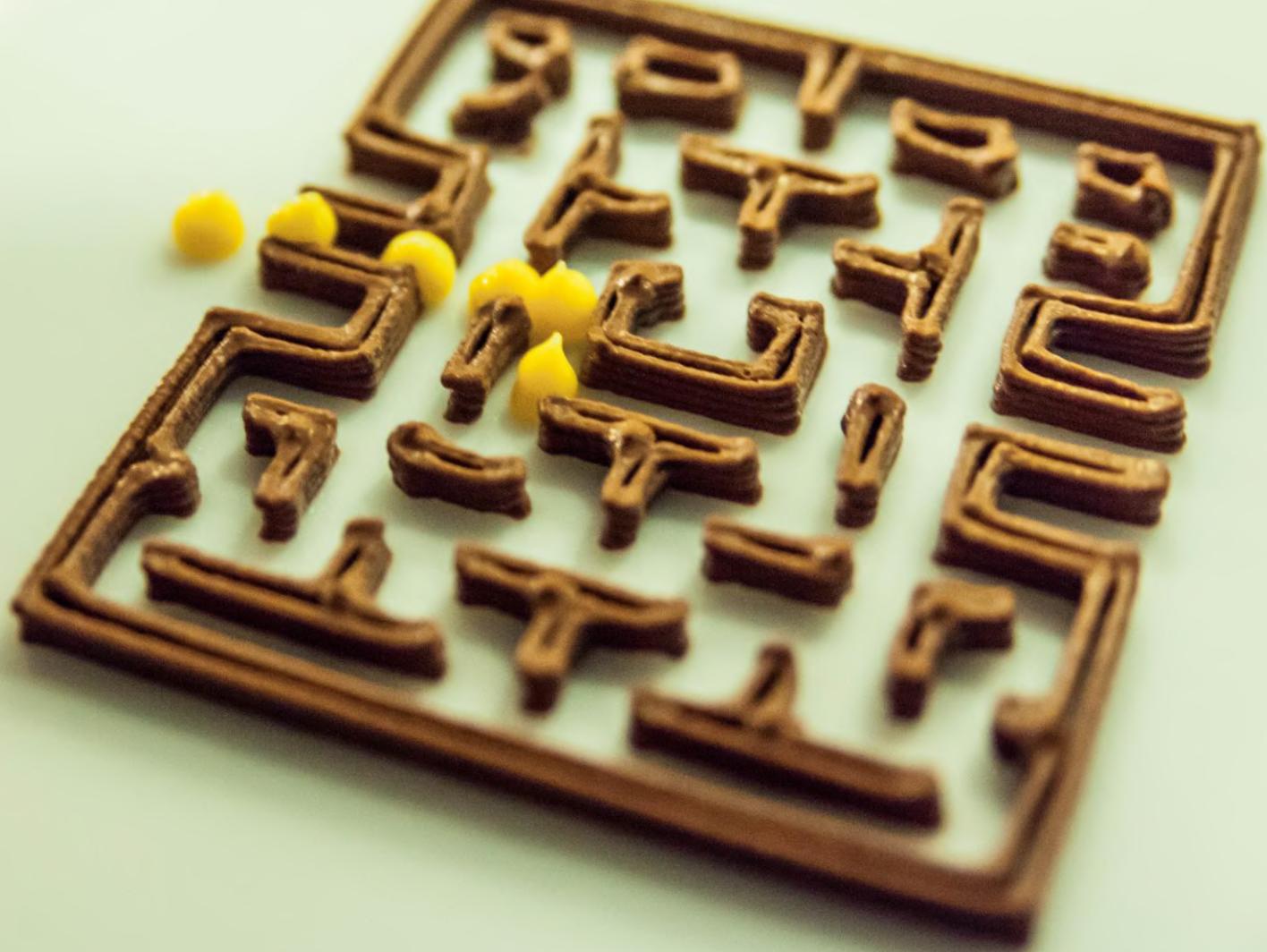
Inspiration from Around the World

change

“

If you don't like change, you're going to like irrelevance even less.

Gen. Eric Shinseki



Our Approach

Themes

Deep Dive into Storytelling



Our Approach

Themes

Deep Dive into
Storytelling



Culinary Inspiration

- **Inform**
- **Inspire**
- **Challenge**



HOW?



KANTAR FUTURES



The background of the image is a dense, repeating pattern of ripe, red tomatoes with their green stems and leaves. The tomatoes are slightly out of focus, creating a soft, textured backdrop. The text is centered over this background.

Challenge

Discover

Understand

Our Approach

Themes

Deep Dive into Storytelling



ALL
NATURAL
Constraint
Breeds
Creativity



STORY TELLING

*The Personality
Behind
the Plate*



BEYOND TASTE

*Playing with
Perception to
Delight the
Senses*



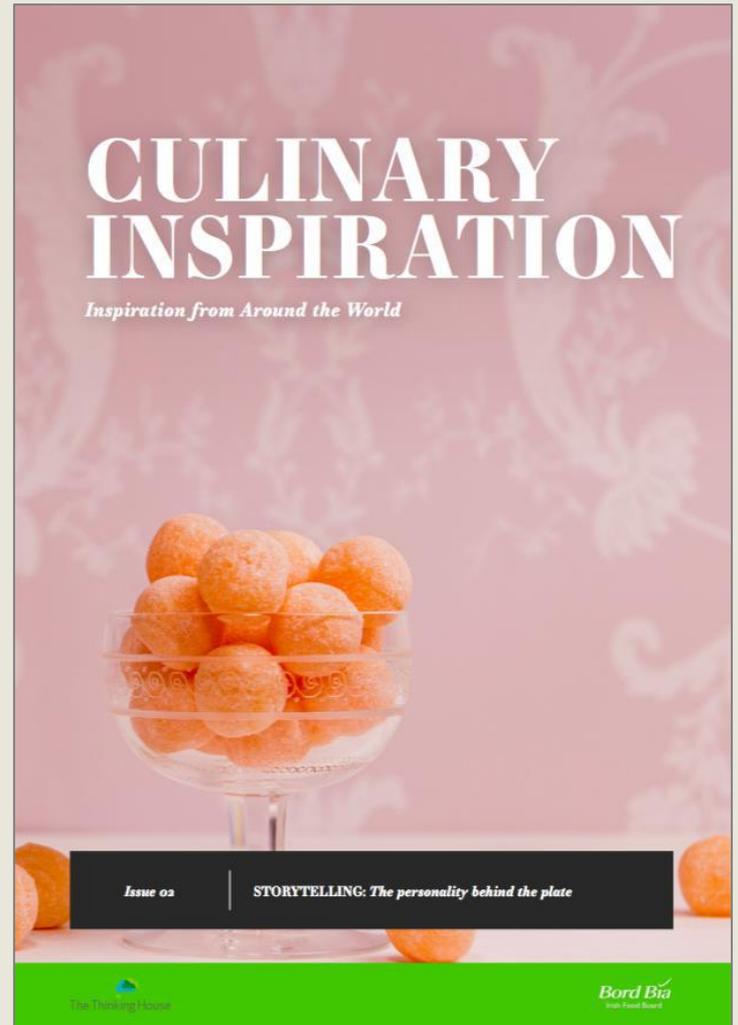
ADAPTIVE
CUISINE
*Diner-centric
dishes*



Our Approach

Themes

Deep Dive into Storytelling





Catalan Squab

Cincs Sentits

RICE

Cooked in stock
from thighs and
vegetables

SQUAB

Indigenous game bird
shot in Northern Spain

BEETROOT

Cocoa powder, smoked
with cinnamon

REDUCTION

Pear and wine with
cacao and winter spices

“

I call it ‘foodemory’ – everyone has a food memory, which you can use to enhance a dining experience.



TOM SELLERS

Head Chef, Restaurant Story

“

Food has a soul,
a story and that
is part of a
traceable
tradition.



JAN HENDRIK
Head Chef, Restaurant JAN

STORY TELLING

*The Personality
Behind
the Plate*

Leading
Restaurants

Dishes, Flavours
& Ingredients

Culinary techniques

STORY TELLING

*The Personality
Behind
the Plate*

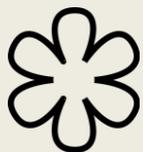
Leading Restaurants

Dishes, Flavours
& Ingredients

Culinary techniques



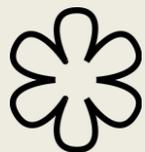
DILL
Reykjavik



**First Icelandic restaurant
to earn a Michelin Star**



RESTAURANT STORY
London



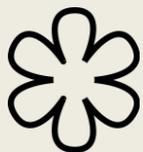
Narratives through plates



CINC SENTITS
Barcelona



Ingredients and dishes
from 100 years ago



STORY TELLING

*The Personality
Behind
the Plate*

Leading
Restaurants

**Dishes, Flavours
& Ingredients**

Culinary techniques

Christmas Sweet Potatoes

**FROTHED Buttermilk,
Served Table Side**

**Buttermilk, infused
with roast potato skins
and reduced to 20%**

**Dehydrated olives
provide texture and
crunch**



Meat Fruit



“

I really enjoy
doing this. I like
to sit there and
listen to the ocean,
smell the ocean



Tasting Notes:

PURE
SALTY
ICELAND

Biltong Butter

**Crumbed South
African Biltong**



Tasting Notes:
SMOKY
CREAMY
INTENSE

**Whipped Pork Lard
extracted from strips
of meat**

Citrus Marinade

**Grapefruit, Lemon
& Orange**

**Mexican Mango,
Chilies & Onion
bringing notes of
Sangria**

**‘Citrus Seared’
Samphire Ceviche**



Tasting Notes:
FRUITY
AROMATIC
SHARP
SPICE

Grilled Calamari

Roasted Beans & Olive Oil

**Rolled Eggplant
stuffed with
Mozzarella**

**Complex
Combinations**

Tasting Notes:

**Rich
Creamy
Earthy**

Yoghurt Technica

Lamb

Sweet Honey Crisp

Tasting Notes:
Marine
Sweet
Succulent
Aromatic

Roasted
Silver Cod

Chive, Goji Berry &
Champagne Sauce



STORY TELLING

*The Personality
Behind
the Plate*

Leading
Restaurants

Dishes, Flavours
& Ingredients

Culinary techniques

Fermentation

“

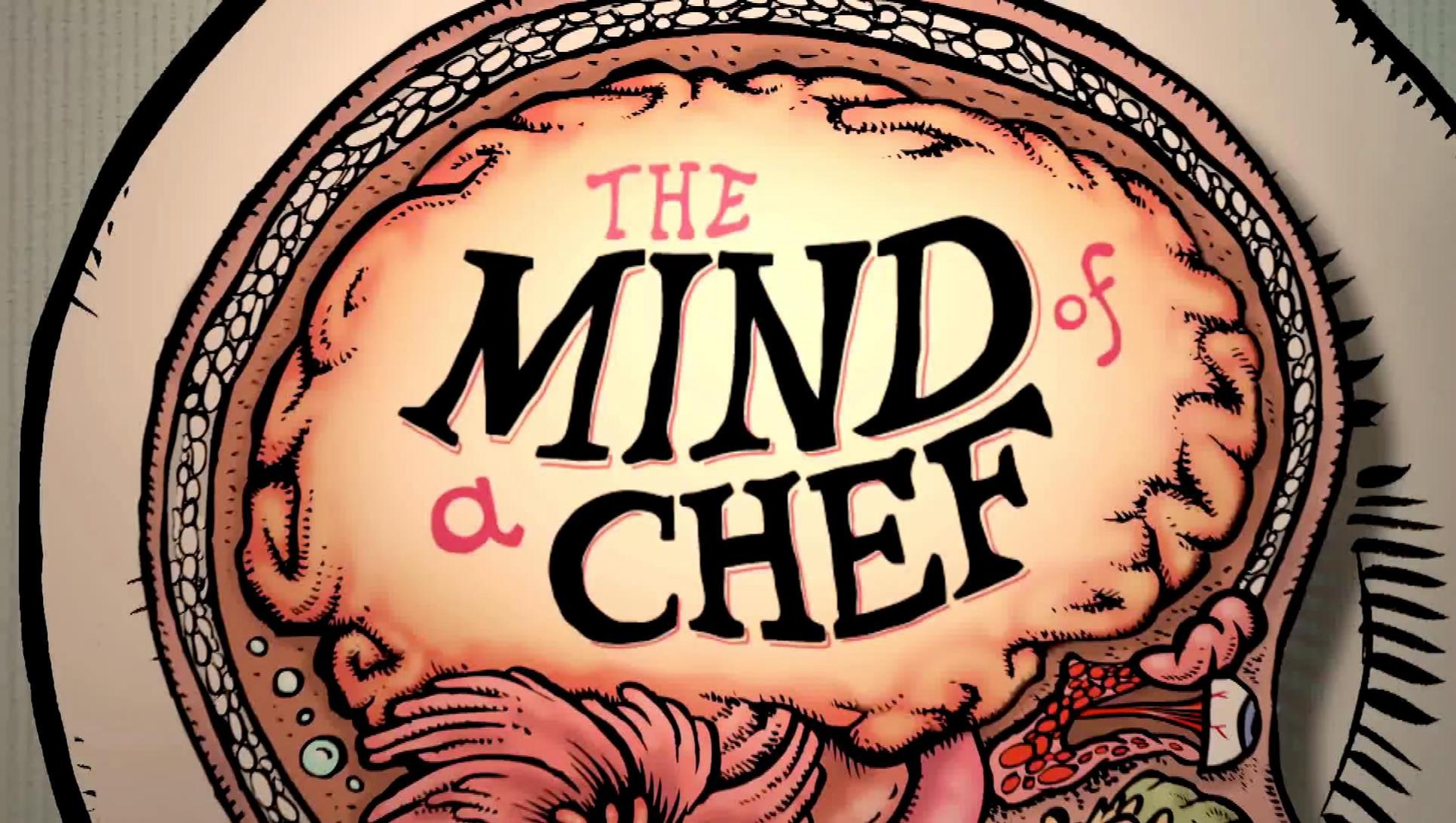
It's insanely good

Dan Barber Blue Hills Farm



Natural Microbes on the garlic bulb ferment, creating more distinct flavours

Tasting Notes:
Caramel
Dark Chocolate
Dried Fruit

A stylized, cartoonish illustration of a human brain, viewed from a top-down perspective. The brain is rendered in shades of orange and pink, with detailed lines for the gyri and sulci. It is surrounded by a thick, textured border that resembles a cross-section of a fruit or a biological membrane. The text "THE MIND of a CHEF" is written across the center of the brain in a bold, black, serif font. "THE" is in a smaller, pink, sans-serif font. "of" is in a pink, cursive font. "a" is in a pink, sans-serif font. "CHEF" is in a large, bold, black, serif font. The overall style is reminiscent of mid-20th-century graphic design or a vintage poster.

THE
MIND of
a
CHEF

STORY TELLING

*The Personality
Behind
the Plate*



MENU OF TOMORROW

Menu

A pea, a stick, a piece of cloth, a coin and a ring...

Warm savoury báirín breac with iced boxty butter, topped with sea salt and vanilla cream

Explore the Wild Atlantic Way

Bantry Bay organic salmon with beetroot bonbons, scallion and nettle buttermilk, with whiskey-smoked and soaked salmon eggs

Rockpooling

Guinness and damson plum-infused drunken mussels with melted garlic flower bog butter, inspired by a traditional 12th century recipe

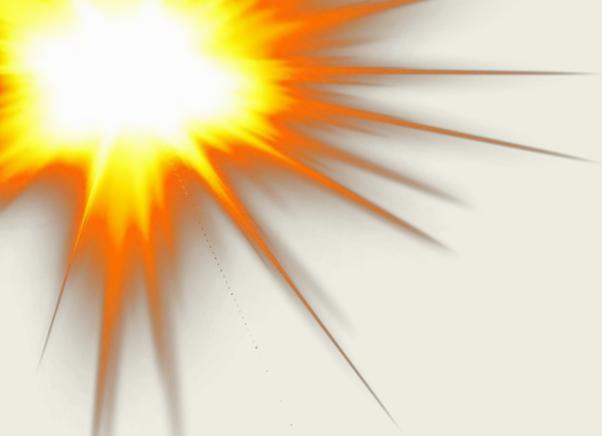
Have a Field Day

Lamb rump, crispy shoulder, truffled potato, wild mushroom foam, organic pea soufflé

Something Sweet to Finish

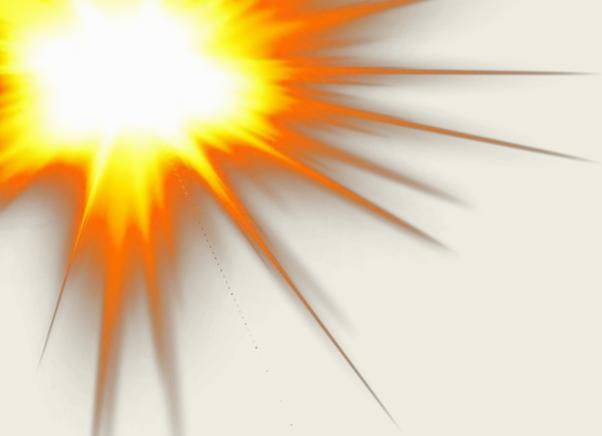
A deconstructed Wibbly Wobbly Wonder Lemon sorbet with white chocolate dipped hazelnuts, fresh strawberries and caramelised banana

A carrageen moss pudding, sourced from the Fanad Peninsula, with a foraged rowan berry compote



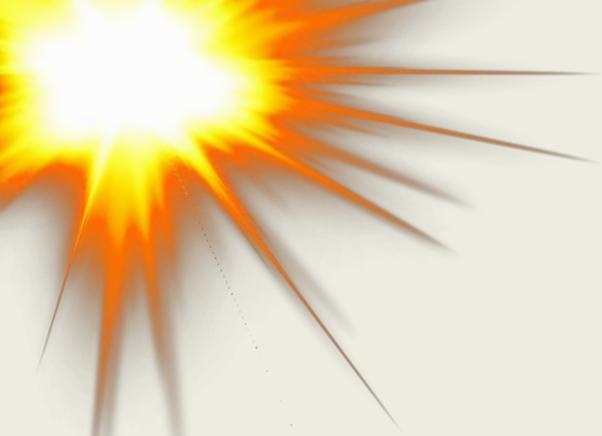
How did your product used to be cooked or experienced?

Could you play with age-old cooking techniques?

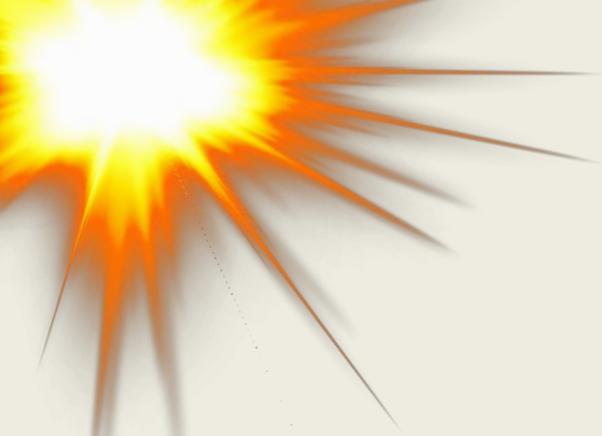


What historical and personal influences are behind your brand and product?

Does it have a 'personality'?



What other foods, drinks and flavours have historically been paired with your product?



Can you integrate techniques from other cuisines to enhance your product?



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Culinary Inspiration

Inspiration from Around the World



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SNACKING TODAY

The role of healthy snacking

January 2018



Scope & Contents



The world of snacking today: context and headlines

Healthy snacking: key influencers

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

Assess purchasing habits and key motivators

Identifying challenges and resolutions



Our research partners

September to
November 2017



The Thinking House

Bord Bia
Irish Food Board

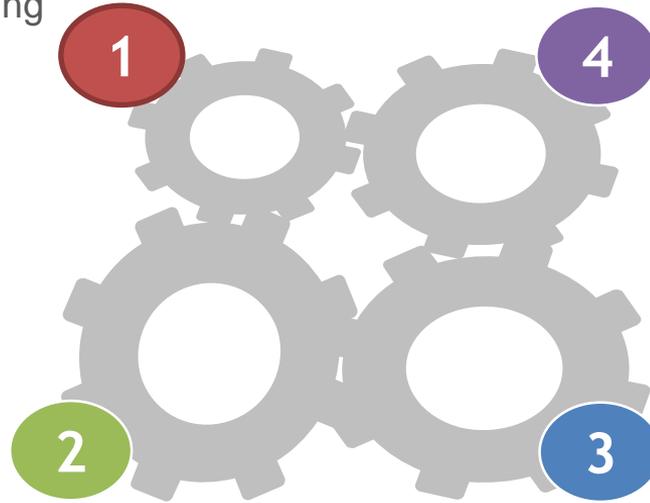
The research had 4 elements

Situational Analysis

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

Quantitative Surveys

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



Pre-Tasks

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

Workshops

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



Details of the quantitative elements

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

UK Omnibus & Irl Omnibus

Both nationally representative studies, flagged as follows:



UK nat rep n=1,000



Irl nat rep n=1,004

UK Snacking Survey

Study focus:

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

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

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

Scope & Contents



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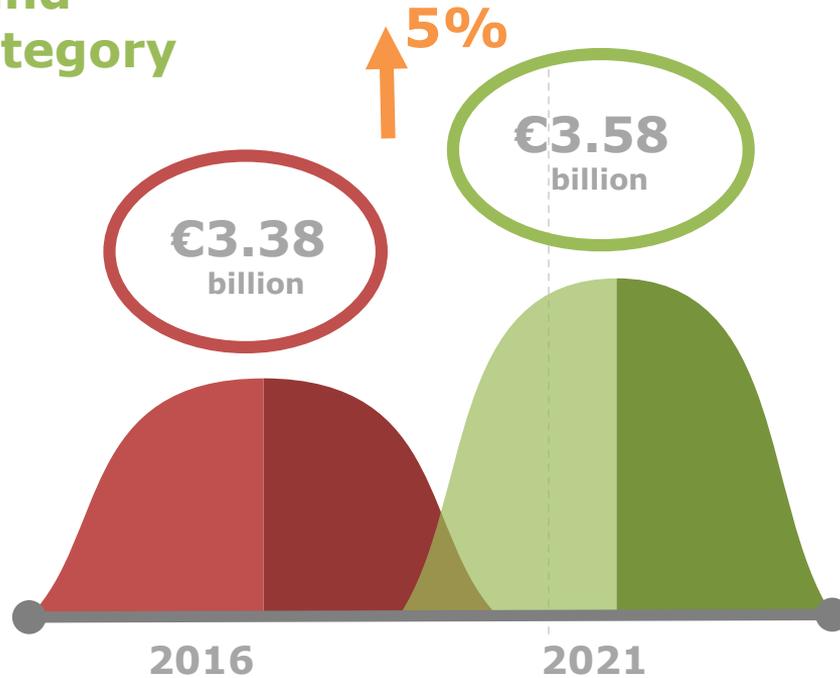
Identifying challenges and resolutions



A sizeable bite – the snacking category today



The All Ireland Snacking Category



What is a snack?

snack

v.

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

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



The snacking landscape 20 years ago



The snacking landscape today



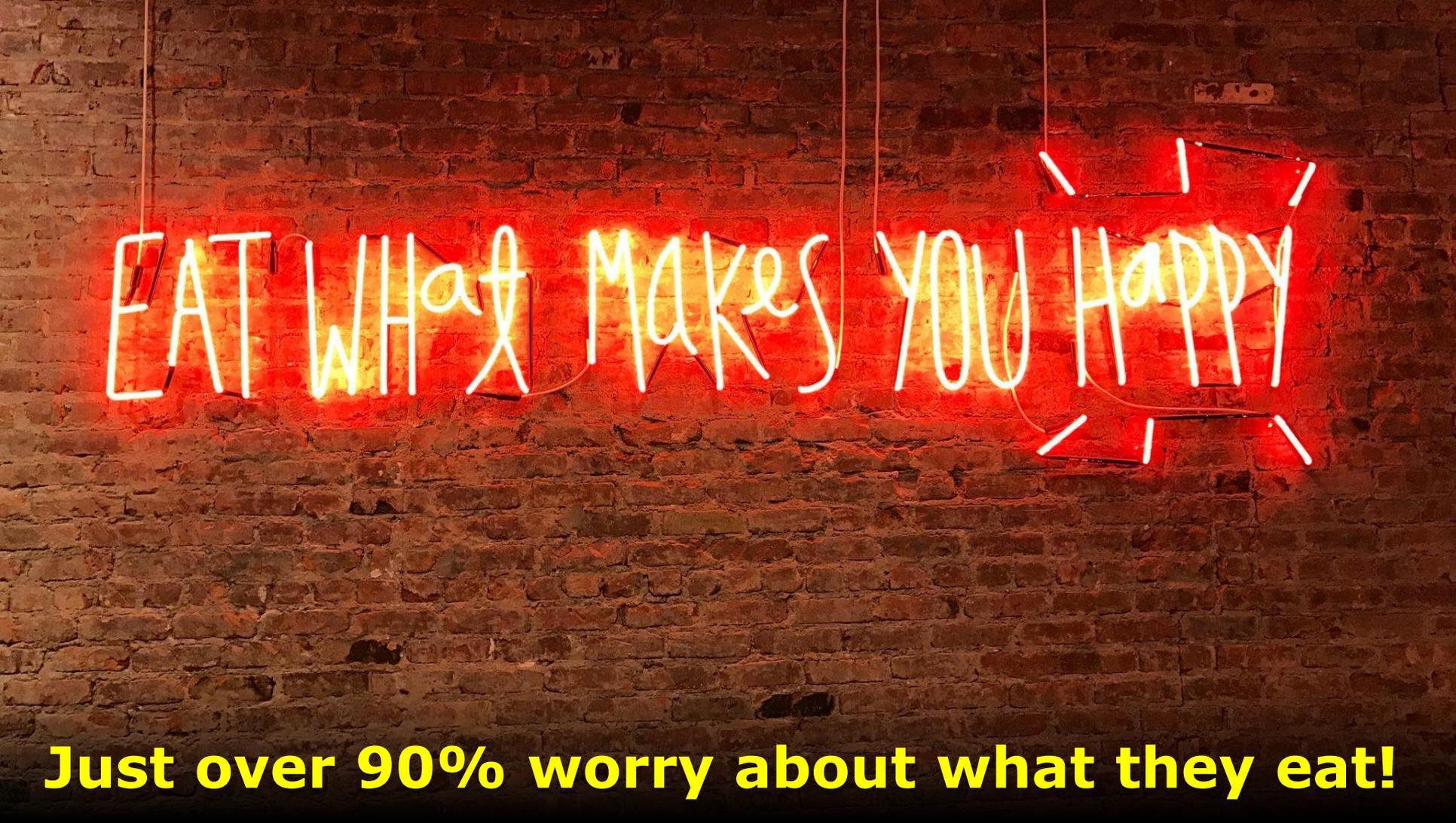
4 in 10 people in Ireland are snacking more often nowadays



A close-up photograph of a person's hand holding a silver fork, lifting a piece of food from a white plate. The plate contains a colorful salad with yellow and green vegetables, red tomatoes, and dark olives. In the background, another person's hand is visible, resting on the table. There are several glasses on the table, including one with red wine and a lit candle in a glass holder. The scene is set in a restaurant or dining room with warm lighting.

Snacking more often is more common amongst a younger profile

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

A neon sign is mounted on a dark, textured brick wall. The sign consists of white neon tubing forming the words "EAT WHAT MAKES YOU HAPPY" in a casual, handwritten font. The sign is illuminated from within, casting a warm, orange-red glow. The words are arranged in a single line, with "EAT" on the left, "WHAT" in the middle, "MAKES" on the right, "YOU" on the far right, and "HAPPY" on the far right. The sign is held up by several thin wires. The background is a dark, textured brick wall with some visible mortar lines and small holes.

EAT WHAT MAKES YOU HAPPY

Just over 90% worry about what they eat!

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



Disciplined

8%

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

Trying hard

36%

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

Good intentions

34%

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

Guilt-free

21%

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

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

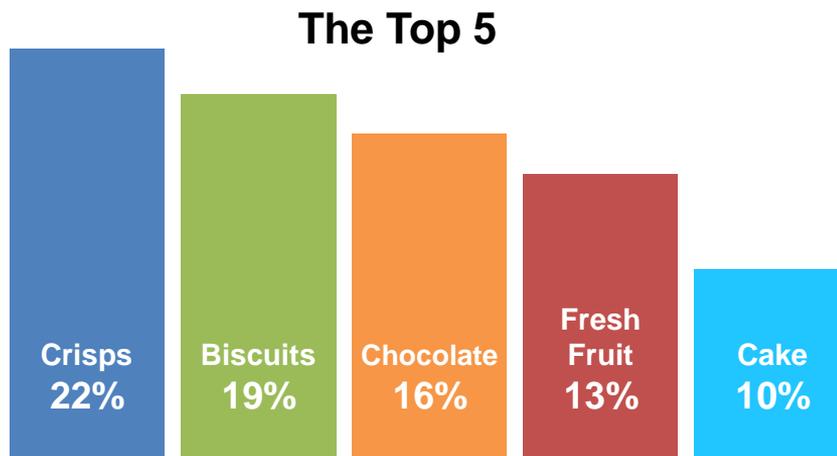
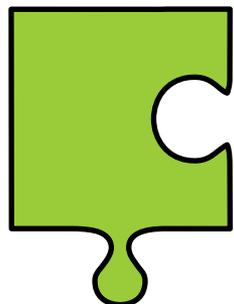
**And yet crisps, biscuits and chocolate
are still our favourite snacks...**



Unhealthy snacks are much more popular than healthy snacks



The snack type



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

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

Between 0-2%

Base: UK nat rep n=1,000



**Real tensions exist that are still
not being fully addressed for consumers**





Getting behind
these tensions
is key



CHOICE

CONTEXT



Choice Architecture For Snacking



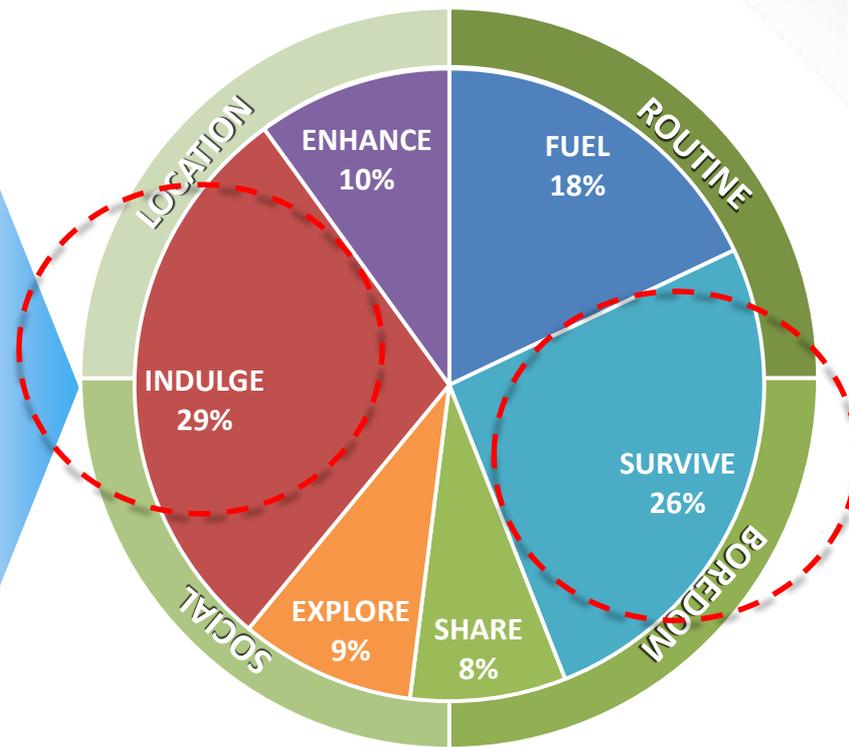
Which of these are typically important to you when it comes to choosing snacks?





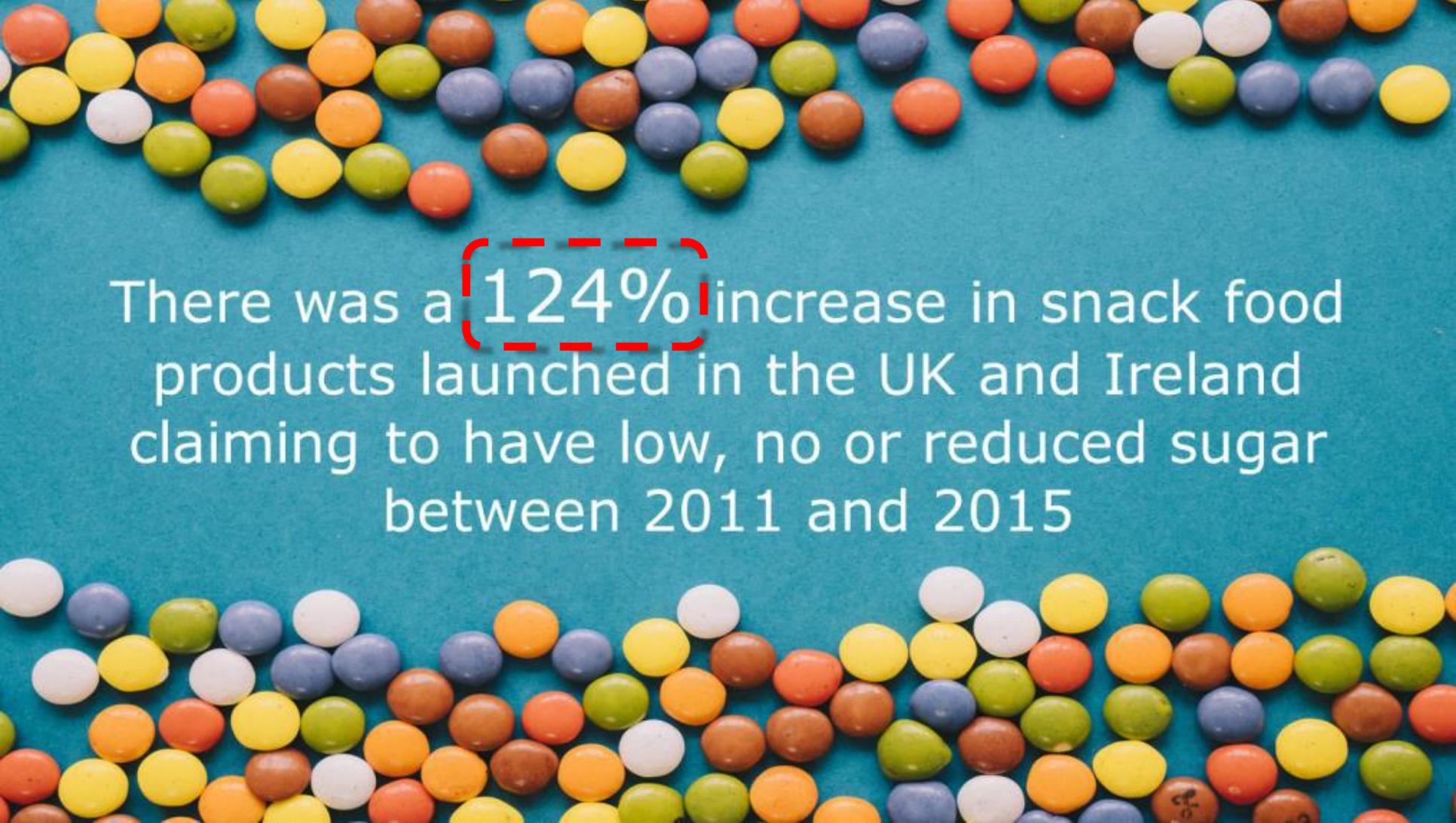
Choice Architecture For Snacking

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





New products launched
in the UK and Ireland
claiming to be high in
protein increased by
257% between 2011
and 2015

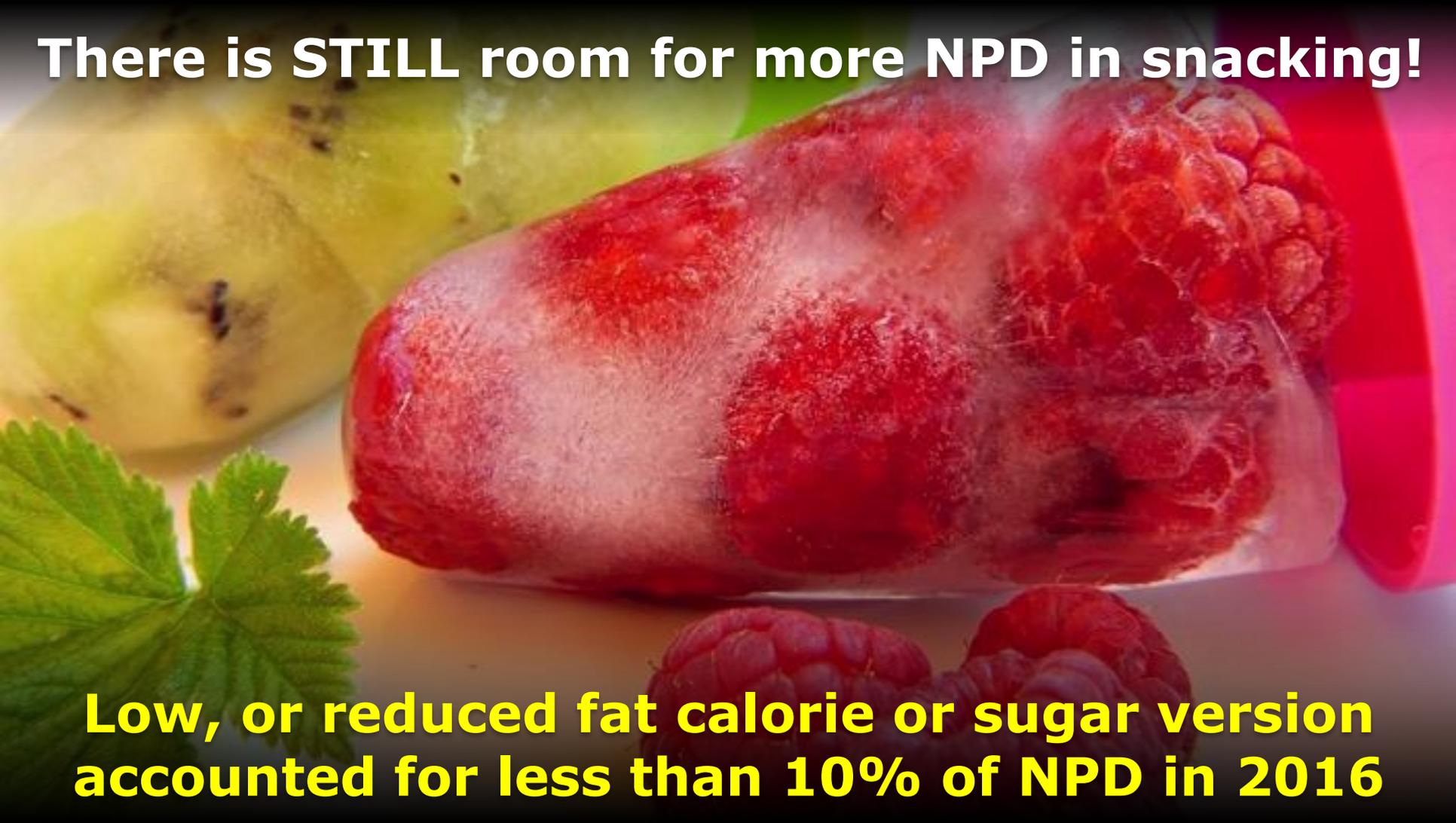


There was a **124%** increase in snack food products launched in the UK and Ireland claiming to have low, no or reduced sugar between 2011 and 2015

Health is now driving NPD in the snacking category

Healthy Snacking now
accounts for **9%** of the
category, but it is in
double digit growth

Sources: Mintel, 2016, Nielsen 2016, WHO 2015

A close-up photograph of a raspberry swirl cookie, a slice of kiwi, and fresh raspberries. The cookie is the central focus, showing a swirl of red raspberry jam on a light-colored base. To its left is a slice of kiwi fruit, and in the foreground are several fresh raspberries. The background is a soft, out-of-focus light color.

There is STILL room for more NPD in snacking!

**Low, or reduced fat calorie or sugar version
accounted for less than 10% of NPD in 2016**

A close-up photograph of a person's hand holding a round, golden-brown cookie. The cookie is decorated with a single blue pansy flower. The background is a soft, out-of-focus grey and white. On the right side of the image, there is white text on a dark grey background.

**People are looking
for healthier
version of the
snacks they love...**

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The Thinking House

BORD BIA INSIGHT CENTRE

Moving towards healthy snacking

THE INFLUENCES...

Understanding the world we live in...



The changing home environment



The way
it was

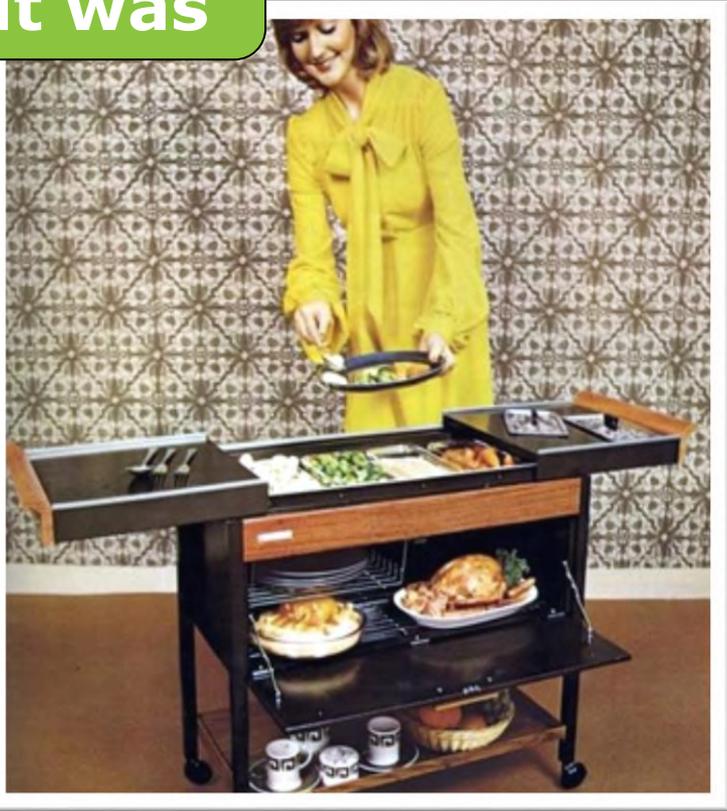


The way
it is

The changing home environment



The way
it was



The way
it is



The new influencers



21 Top Food Bloggers



The conscientious citizen



The rise of health hedonism and the health-centric generation



The way we live ... our lives in flux



AVO-LUTION

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





The new Avocado..
Why figs are having a moment

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The Thinking House

BORD BIA INSIGHT CENTRE

Unlocking behavioural dynamics

Four interlocking factors in understanding snacking behaviour



1. The occasion

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

2. The person

What is their general outlook on healthy eating and snacking?

3. The motivation

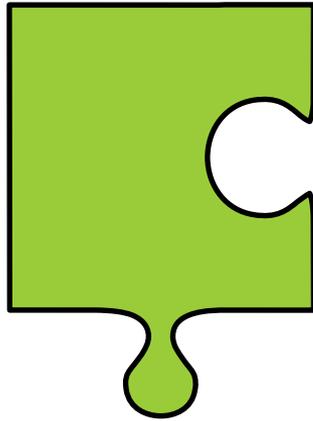
Are there specific reasons for having a snack at this time?

4. The snack type

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



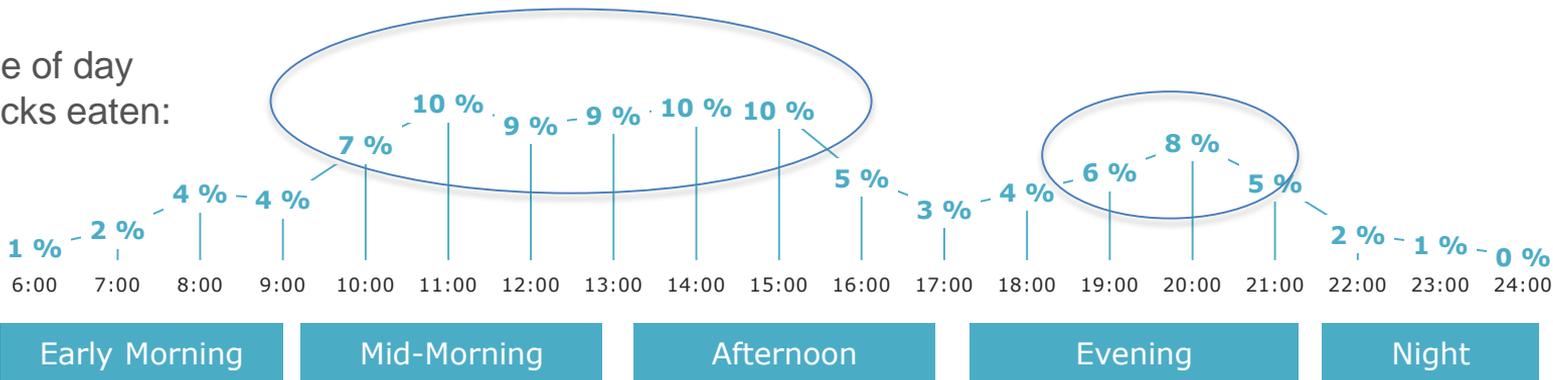
1. The occasion





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

Time of day
snacks eaten:

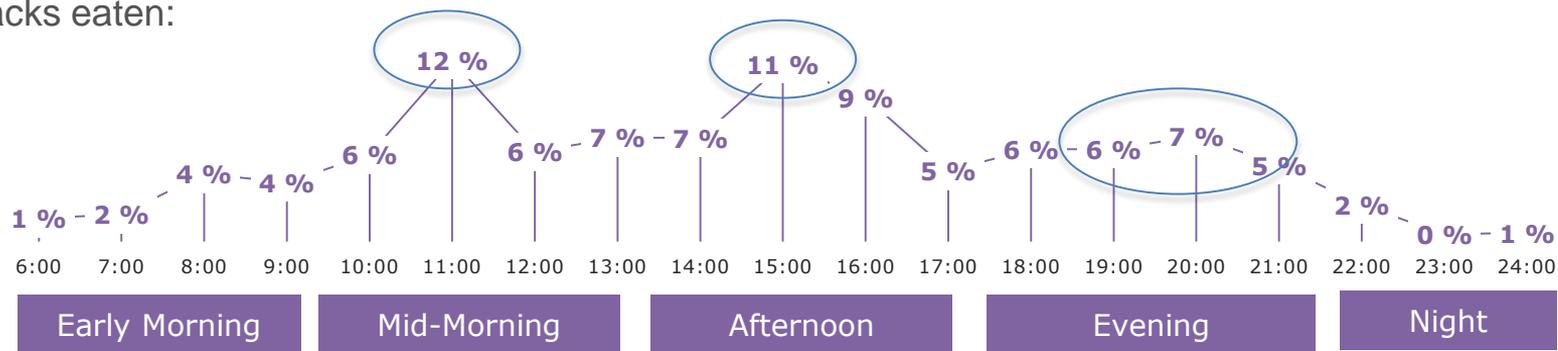


Base: UK Nat Rep n=1000



Classic 11am and 3pm snacks are very prominent in Ireland

Time of day
snacks eaten:



Base: IRL Nat Rep n=1004



Across all occasions, unhealthy snacks dominate



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

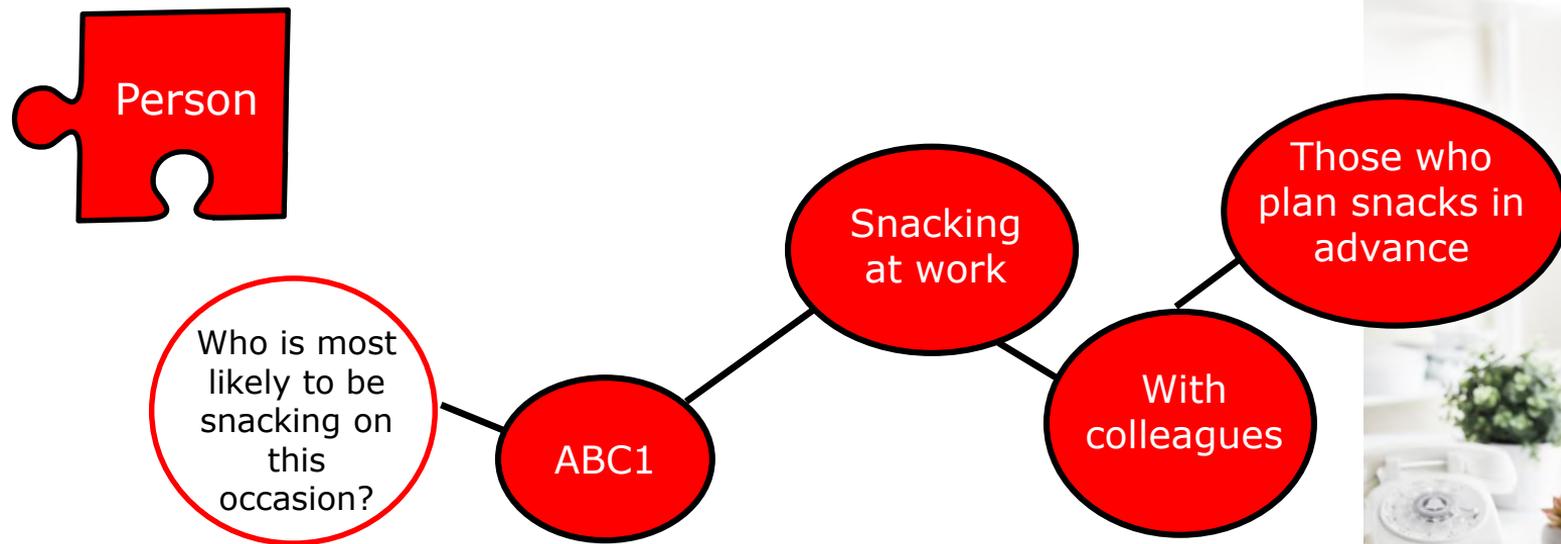


However, there are differences across the time of day based on types of snack and motivations

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



The mid-morning snack occasion



Base: UK Snacks eaten in Morning n=507



Yet what is more likely to be eaten at this time than others include:



- ✓ Fresh fruit and veg pots: 55%
- ✓ Yoghurt and dairy drinks: 44%
- ✓ Smoothies and juices: 29%
- ✓ Granola and flapjacks: 25%
- ✓ Rice and corn cakes: 20%
- ✓ Protein bars and ball: 17%

The mid-morning snack occasion



More about this



Less about this



Fuelling

I wanted the basic nutrition my body needs

(26% feel Healthy after this snack)

Indulging

I bought it to comfort me and make me feel good

It was for a treat, pure enjoyment

n=507 (Snacks eaten in Morning)



The afternoon snack occasion



Person

Who is most likely to be snacking on this occasion?

Actively looking for recommendations on healthy snacks

Went and bought the snack specifically when they needed it



Likely to be eaten at this time

57%



36%



19%



The afternoon snack occasion



More about this

Fuelling

I needed an energy boost.

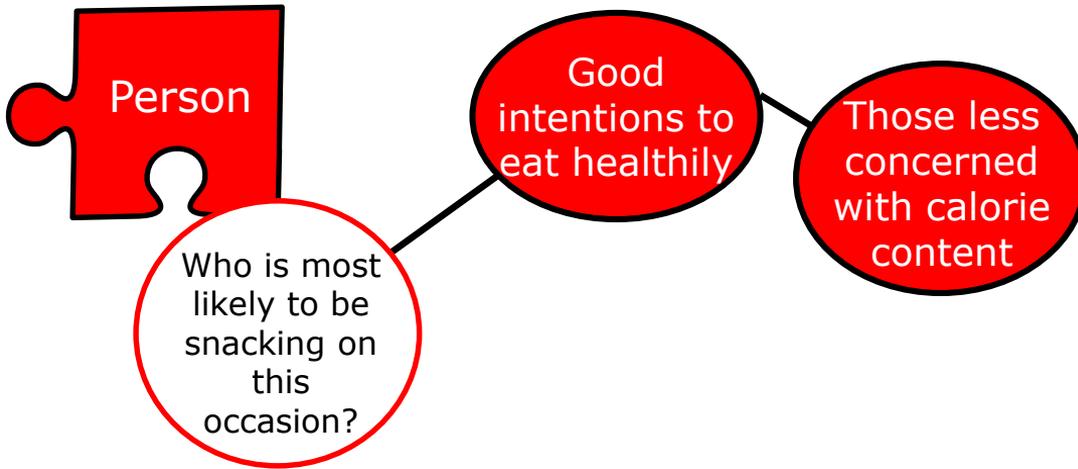
(20% felt energised after they had their snack)



n=474 (Snacks eaten in Afternoon)



The evening/night snack occasion



Base: UK Snacks eaten in Evening/Night n=375



Yet what is more likely to be eaten at this time than others include:



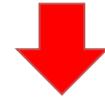
72%

72%

The evening/night snack occasion



More about this



Less about this



Indulgence

I bought it to comfort me or make me feel good.

It was a treat, pure enjoyment.

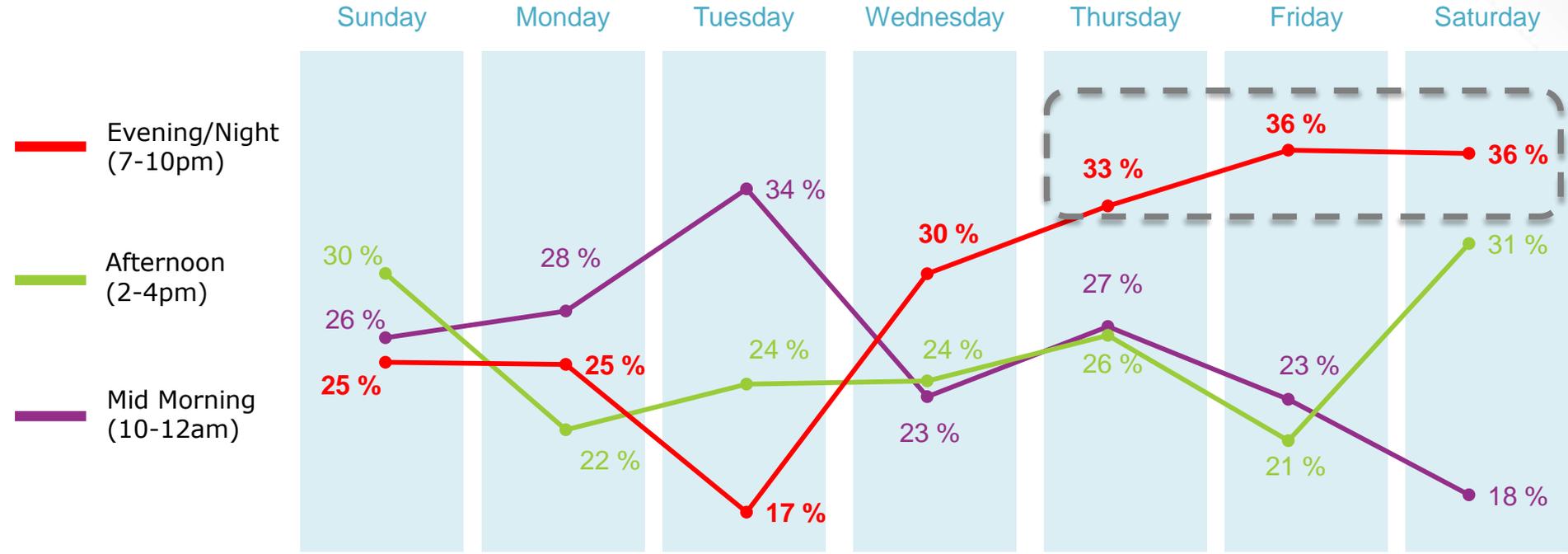
Energise/Survive

Under-indexing for feeling, fulfilled (16%) and energised (7%)

n=375 (Snacks eaten in Evening/Night)



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



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

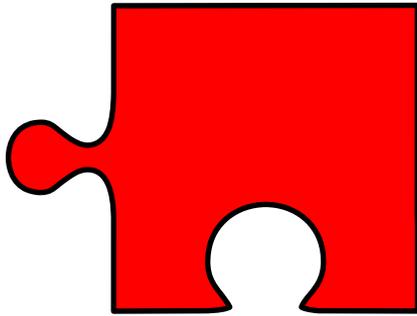




“Sometimes I go to bed early just because I know if I stay downstairs, I’ll eat toast”

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

2. The person



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





Most consumers are trying to eat healthier



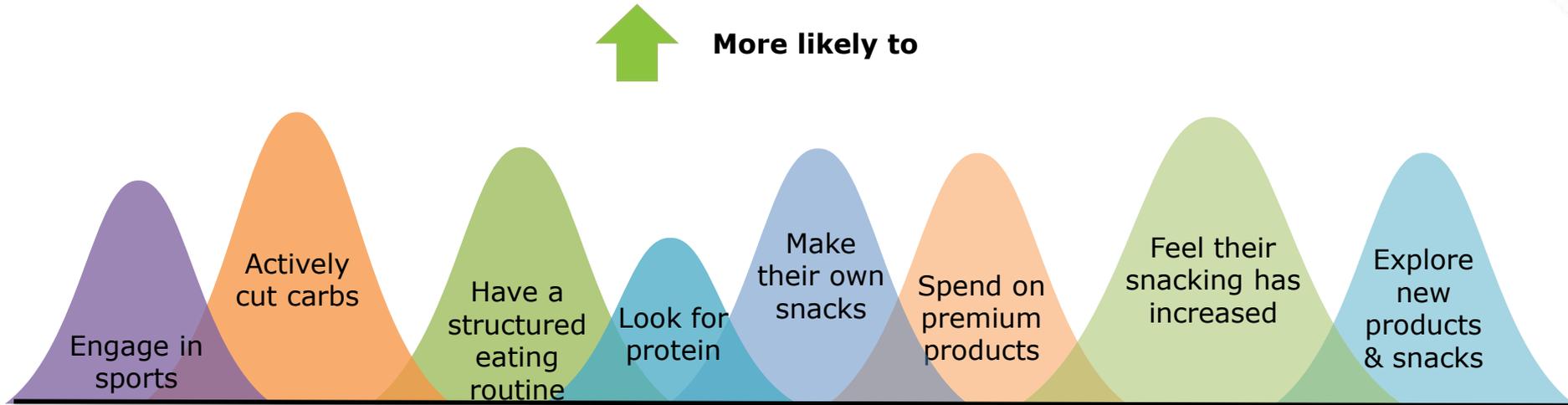
BAD

GOOD

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

Group 1 – Disciplined (8%)

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



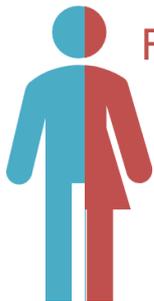
Base: UK snackers aged 18-54 n=1,000



Group 1 – Disciplined (8%)

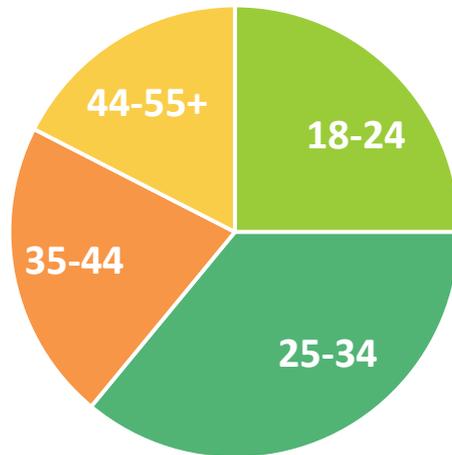
'I carefully manage my food and consider myself a very healthy eater'

61% Male
39% Female



70% ABC1

Age Groups



Top 5 snack types eaten in the past week

Fresh fruit & veg and veg snacks / veg pots	51%
Yoghurt / dairy drinks	44%
Biscuits / buns / pastries & cakes	42%
Chocolate / sweets and treats	38%
Nuts, seeds and trail mixes	37%

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

Group 3 – Good Intentions (34%)

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

Agree
34%

Disagree
33%

More likely to

See snacks
as treats and
indulgence

Graze
throughout
the day

Source info
about snacks
& snacking

Subscribe to
'food as fuel'
mentality

Keep up with
healthy eating
trends

See snacks as a
source of
nutritional
benefit they
would not
otherwise
get

Be active

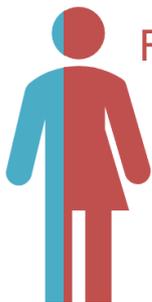
Less likely to

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

Group 3 – Good Intentions (34%)

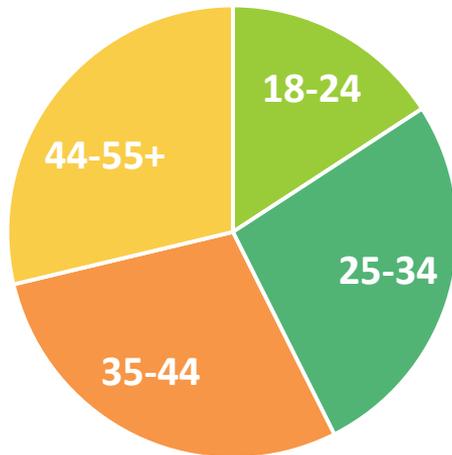
'I have good intentions to eat healthily but am only successful some of the time'

44% Male
56% Female



57% ABC1

Age Groups

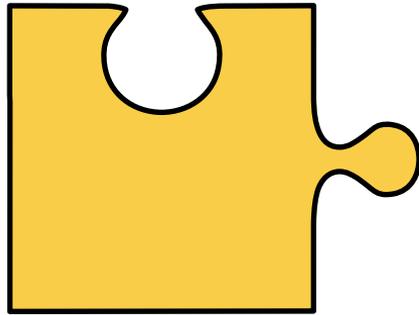


Top 5 snack types eaten in the past week

Chocolate / sweets and treats	74%
Crisps / Popcorn / Potato and corn snacks	70%
Biscuits / buns / pastries & cakes	63%
Fresh fruit & veg and veg snacks / veg pots	42%
Yoghurt / dairy drinks	35%

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

3. The motivation



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



Understanding the triggers and emotions



Finding new snack inspirations to try (tend to healthy and planned)

Overlap – nutrition and sustenance

#Lovefood
The enjoyment and reward factor of snacking

Twin desires of indulgence and trying to be healthy – a constant battle

I try to choose snacks that are healthy...

Agree
54%

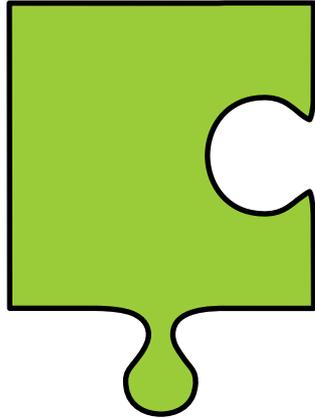
Disagree
20%

I use snacks as a treat between meals...

Agree
67%

Disagree
15%

4. The snack type



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



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



Key drivers of product choice

Taste

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

"You want to like what you eat"

Ingredients

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

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

Packaging

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

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

Value

Expect to pay more for healthy snacks

"Some prices are very high"

Brand

Less of a consideration due to proliferation of new brands

"You see new brands all the time"

Origin

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

"To be honest I don't check"

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



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

% agree

All

Disciplined

Trying hard

Good intentions

50%

53%

47%

53%

I would eat healthier snack foods if they tasted better

% agree

All

Disciplined

Trying hard

Good intentions

64%

62%

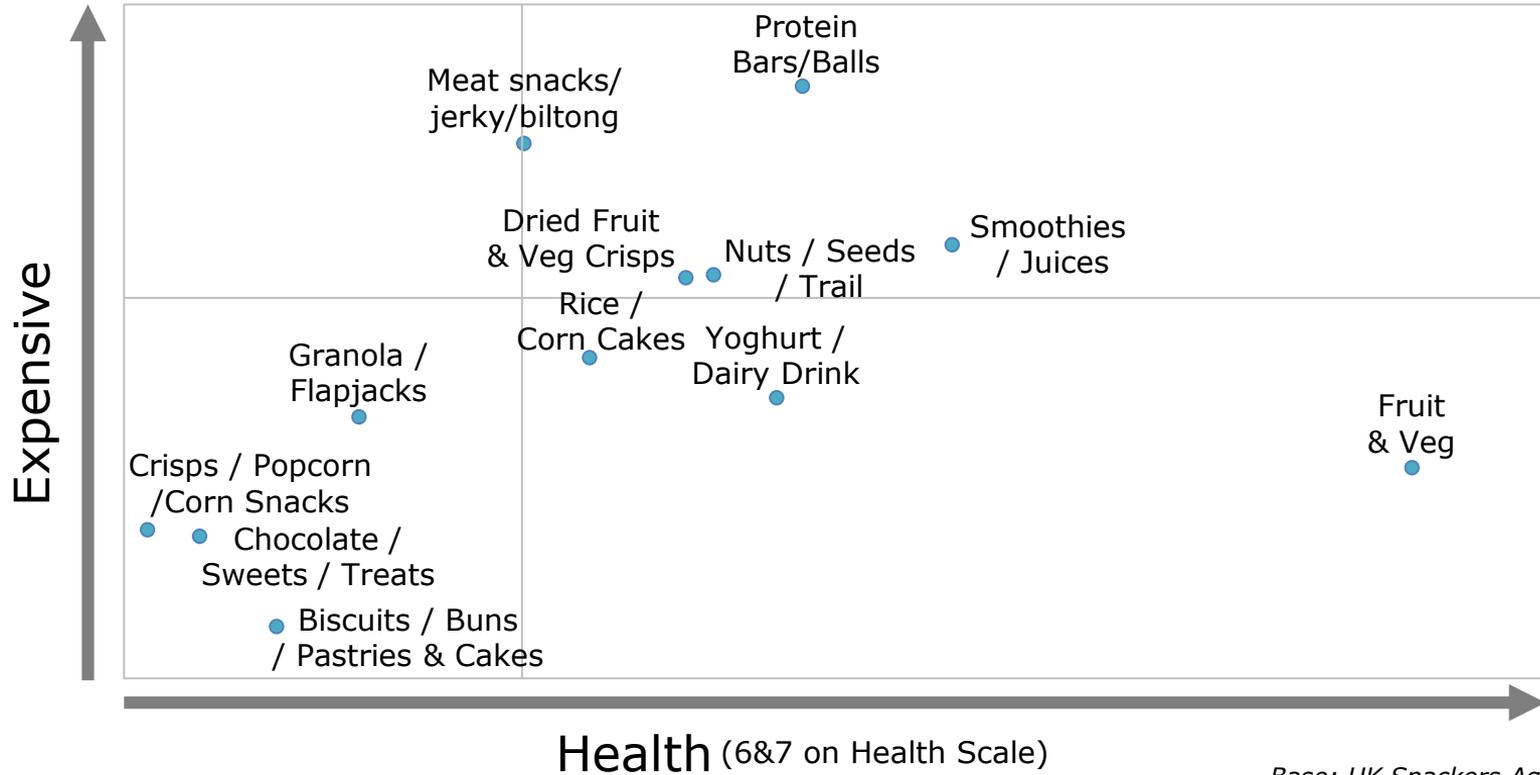
61%

69%

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



Healthy versus expense



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



Indulgence with a healthy halo

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



Scope & Contents



The world of snacking today: context and headlines

Healthy snacking: key influencers

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

Assess purchasing habits and key motivators

Identifying challenges and resolutions





The Thinking House

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Snacking UK and Ireland

How people shop

What they look for why and where

Where are people purchasing snacks?



Large Supermarkets

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

Convenience Stores/ Express Supermarkets / Corner Shops

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

Health & Specialist Sports Stores

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

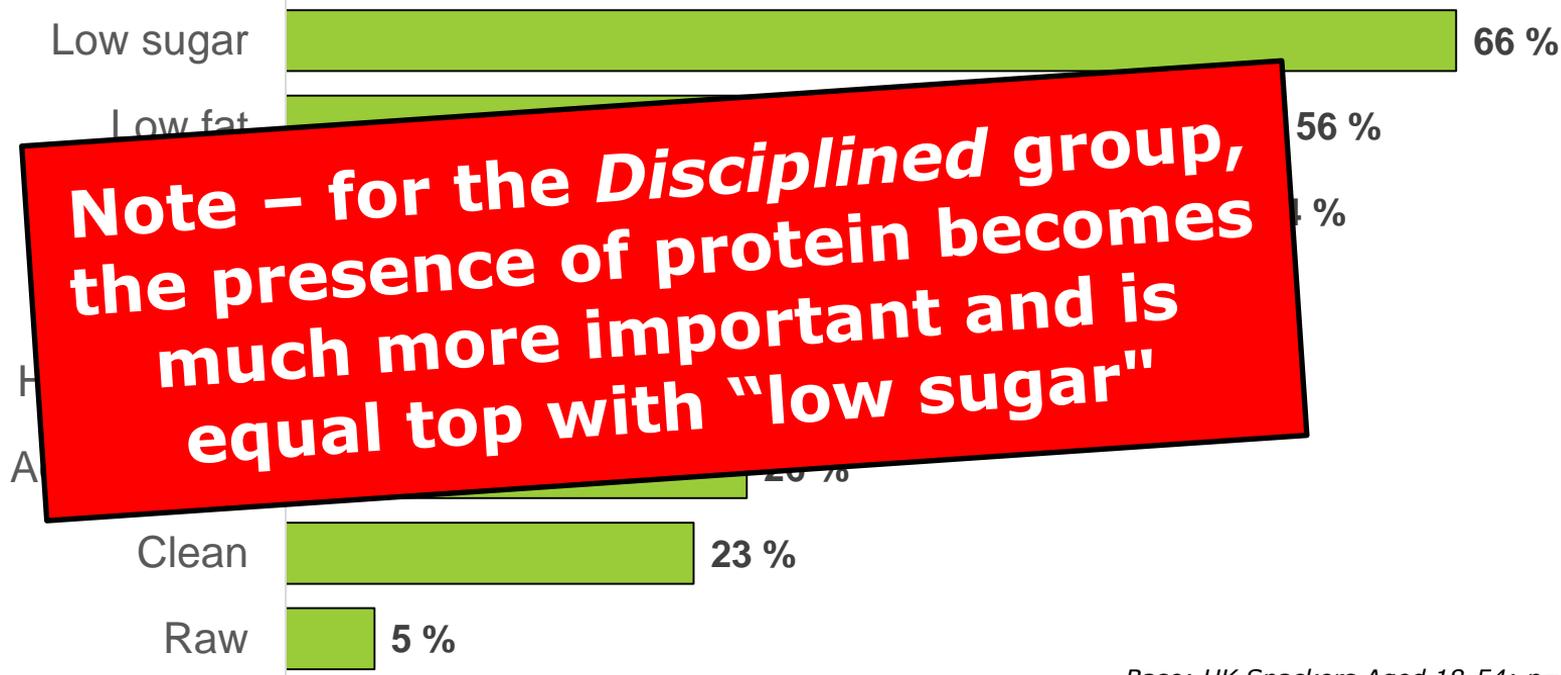
UK Total Sample n=1000, snack instances n=1913



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

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

Most important benefits



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



Perceptions of health – packaging plays a critical role

Agree
52%

Disagree
18%

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



Ideal packaging for a healthy snack should have:

Visual of finished product - increase appeal

Natural colours - no bold garish colours

Made of natural materials, cardboard or matt finish

High quality food / ingredient imagery

Short ingredient deck

Use descriptors as a shortcut

Benefits clearly identifiable on front

Not too busy on front

Portionability



A brand that's got packaging right



A brand that's got packaging right



Natural packaging
type – cardboard
with matt finish



A brand that's got packaging right



Natural colours and images give cues: 'less processed'



A brand that's got packaging right



Clear, detailed
flavour descriptor



A brand that's got packaging right



Window to show
the food inside:
increase appeal



A brand that's got packaging right



Health benefit
clearly identifiable
and quantified



What is healthy?



Sometimes it's about presenting people with an alternative!!
Understanding the context of choice is important.





POS – key moment for consumer to get info about snacks

33% say they get their product info here

Packaging – vital role in this category

Message clarity

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

Agree
58%

Disagree
16%



The more health conscious people are, the more help they need!

10% LESS PACKAGING, SAME SIZE BAR



CRUNCHY
PEANUT BUTTER



NET WT 2.40 OZ (68g)



Healthy imagery

Outdoorsy

Matt finish

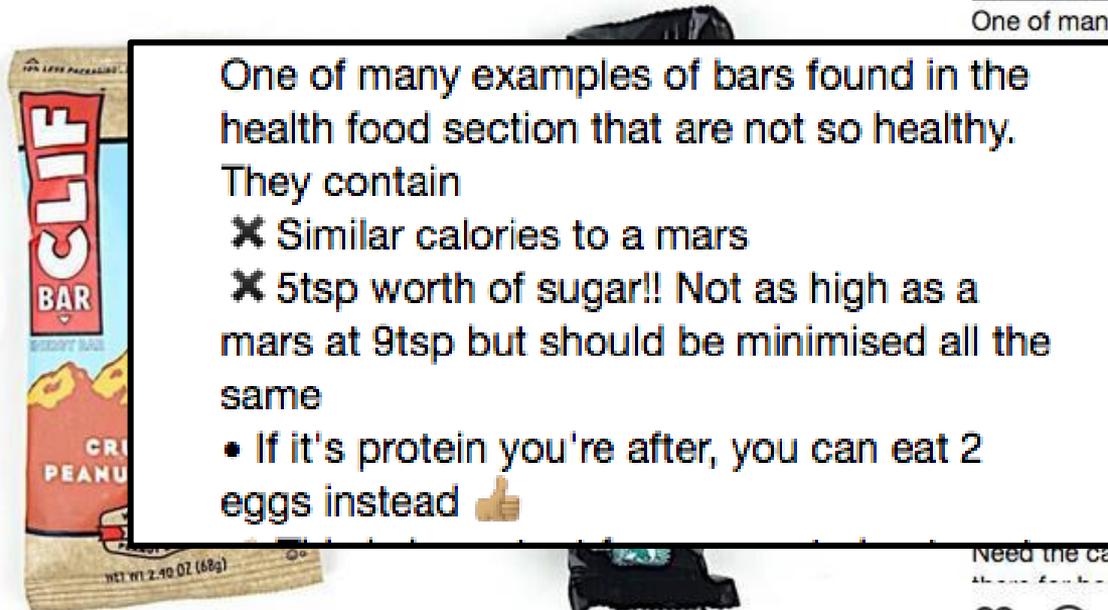
Good colours

“Organic”

“10% less packaging”

“Energy bar”

259cals/1088kJ



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

- ✗ Similar calories to a mars
- ✗ 5tsp worth of sugar!! Not as high as a mars at 9tsp but should be minimised all the same
- If it's protein you're after, you can eat 2 eggs instead 👍

243cals/1020kJ



movingdietitian
Melbourne, Victoria, ...

Follow

movingdietitian HEALTH FOOD AISLE FAIL

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

Similar calories to a mars
Amount of sugar!! Not as high as a mars but should be minimised all the

If you're after, you can eat 2



Important for anyone trying to cut carbs. Bars like this can be useful in emergency situations where you need a source of carbs

Comments

100 @movingdietitian exactly!

Need the carbs to run well since ill be out there for hours



223 likes

2 DAYS AGO

1 in 2 people want snacks they can split into portions

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

**Agree
47%**

**Disagree
22%**



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

1 in 2 people want snacks they can split into portions

I like & want to snack, but I want to be able to **limit** my snacks

Agree
58%

Disagree
17%

People want permission to snack, but to be able to do so in a controlled way

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

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From challenge to resolution

**EMERGING
OPPORTUNITIES**



Opportunity

#1

Serving the
reluctant
compromiser

RESOLUTION



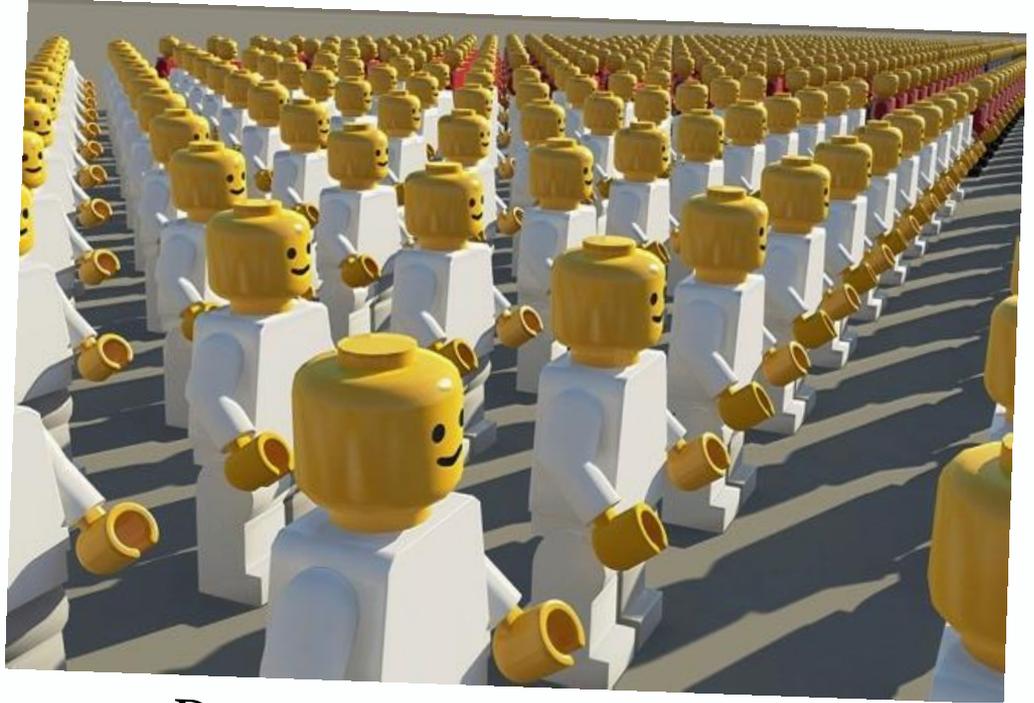
More options with taste!

Opportunity

#2

Introducing
them to the
new world

RESOLUTION



Democratising better choices

Opportunity

#3

Supporting the
cynical and
confused!

RESOLUTION

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

Provide the cues...

Opportunity

#4

Facilitate
identity
badging

RESOLUTION



Creating relevance

Opportunity

#5

Tick-tock
with the
body clock

RESOLUTION



Create a portfolio of solutions

Opportunity

#6

Grant
permissible
indulgences

RESOLUTION



Address the moments of risk

Opportunity

#7

Find the
perfect
partners

RESOLUTION



What's the new milk & cookies?

Opportunity

#8

Chunk it down!

RESOLUTION



New sizes

Opportunity

#9

Chunk it up!

RESOLUTION



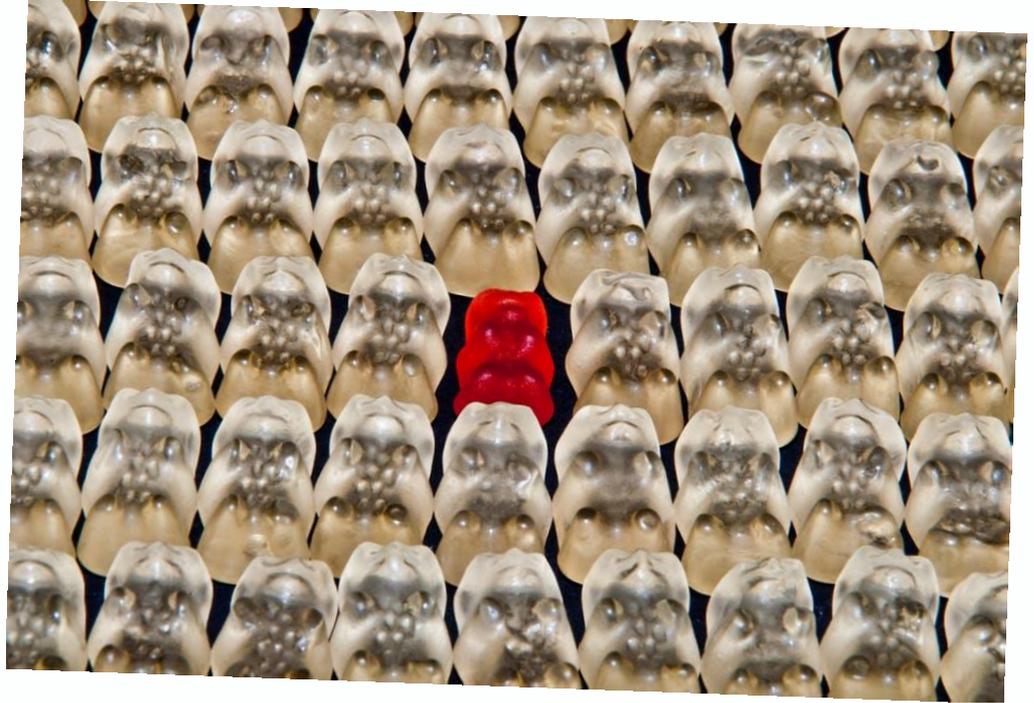
New sizes

Opportunity

#10

Accessible
aesthetics

RESOLUTION



Codes of colour

Opportunity

#11

Democratising
health

RESOLUTION



Create better value

From challenge to resolution

**EMERGING
OPPORTUNITIES**





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2018

BI:TES

Better Ideas: Think Evaluate Select

Introducing Bites – our new concept iteration and valuation tool.

We want to support you in bringing better ideas to the market to build commercial success.

- Innovations
- Propositions
- Products
- Packaging



BI:TES

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- Instant Feedback on innovations, products, propositions and concepts
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- Mobile native, short surveys
- Option to co-create iteratively
- Rapid headline feedback from anywhere in the world at a low cost





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