

# Bord Bia's Approach

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12.12.12

Growing the success of Irish food & horticulture

*Bord Bia*  
Irish Food Board

## Our Mission

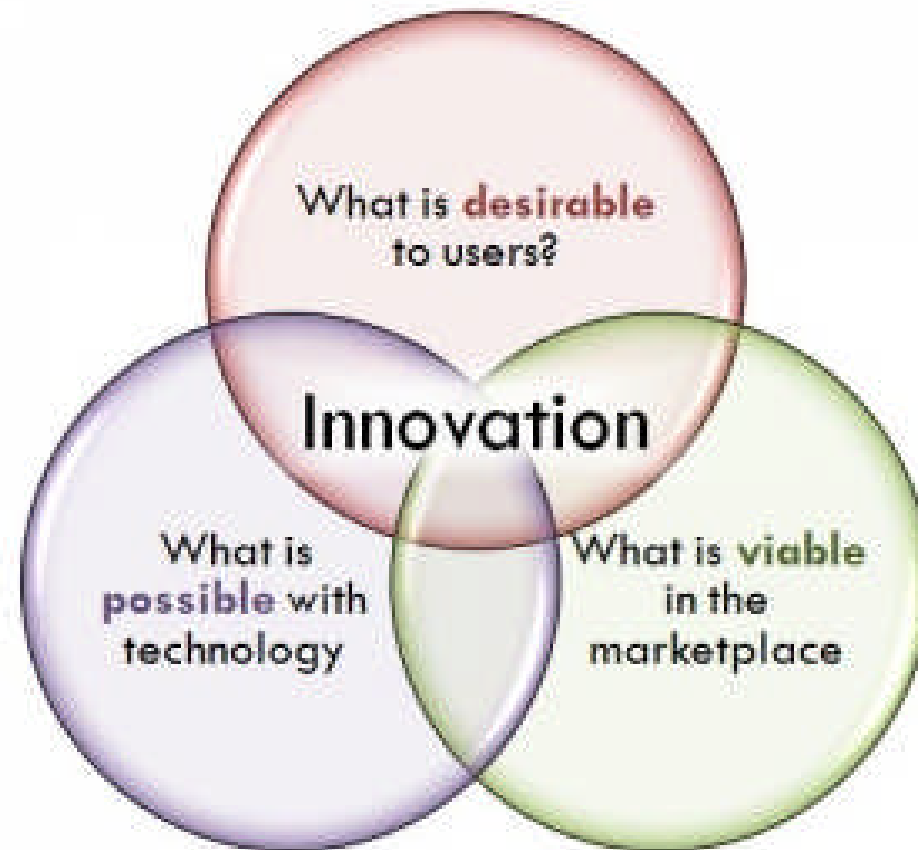
“To drive through market insight and in partnership with industry the commercial success of a world class Irish food, drink and horticulture industry”

Statement of strategy 2012/2014

# Agenda...

1. The dimensions of innovation
2. Bord Bia's approach
3. Consumer Lifestyle Trends

# What is innovation?





Innovation = ideas?



# Innovation is about the diffusion of ideas



**Ideas**



**Incubation**



**Diffusion**



Achieving Grow,  
Sustain and Excel  
through new ideas  
and innovative  
solutions

Innovation = collaboration?



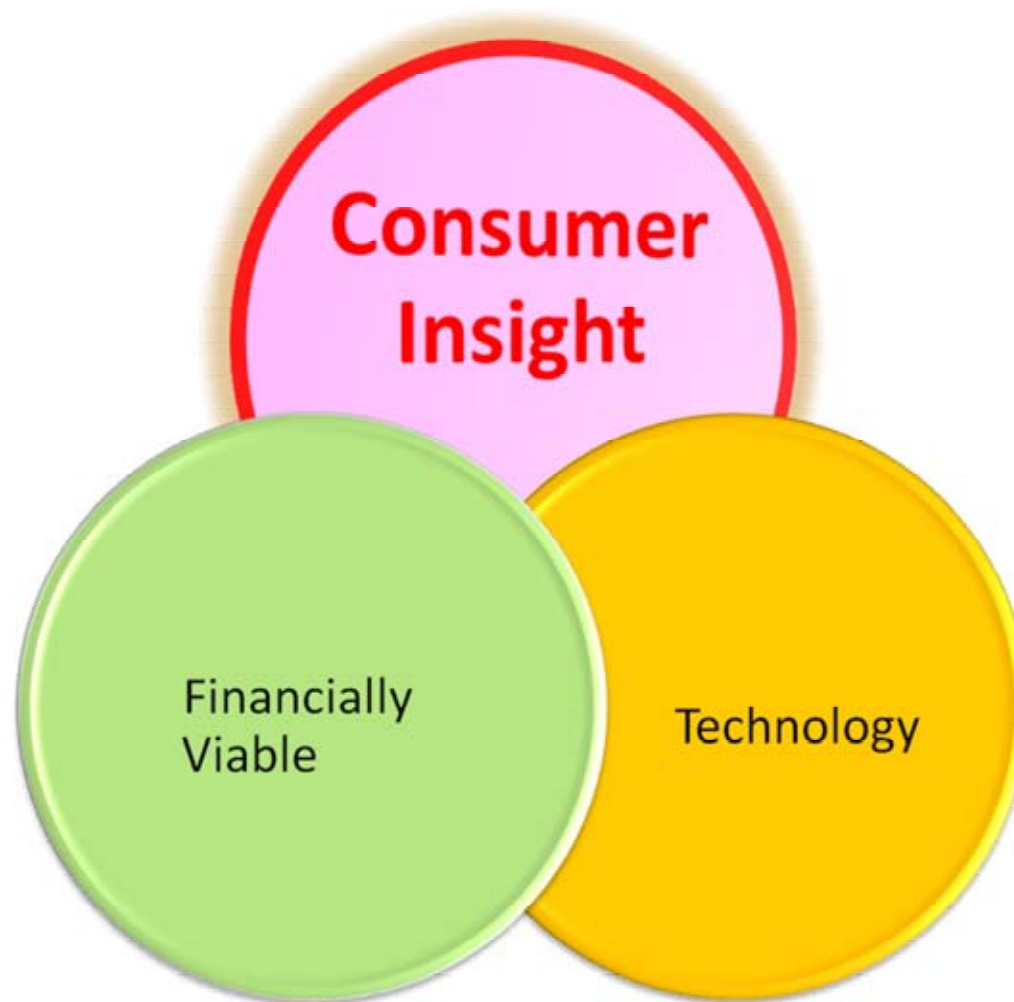
# Innovation gives direction



**Embedding Best Practice:**

**Bord Bia's Insight & Innovation Team**

## Bord Bia...



# Insight & Innovation team

## Embedding Best Practice



**Our vision** is to develop a new innovation culture across the industry that delivers a balanced pipeline for sustained growth:

- a stream of product improvements and line extensions that create consumer and customer noticeable differences;
- value engineering to keep us competitive in the market;
- and a small number of big and meaningful innovations that will drive export growth



# Insight and Innovation

## **SPORTS NUTRITION** **The European Market**



*Consumer Lifestyle Trends*



**PERIscope 6**  
Irish Consumers  
& Their Food

Landscape of Global Food and Drink

## Feeling the Pinch: The Consumer Outlook – January 2012

*A strategic report on the challenges for the  
Irish Food and Drinks industry*

## The Future Landscape of Global Food and Drink



**Bord Bia**  
Irish Food Board  
**Looking to 2025:**  
**The future of alcohol**





# Insight & Innovation

There are a number of opportunities emerging in the nutrition space

## Hidden and healthy

*"I want to give my kids healthy food that they will enjoy eating"*



## Simple but good

*"I want my children to eat healthy foods that are free from nasties"*



## Food as fuel

*"I want food and drink that help me perform at my best"*



## Ageing Well

*"I want to act and feel younger for longer"*



## New frontiers of digestive health

*"I want to get the most out of the food I eat"*



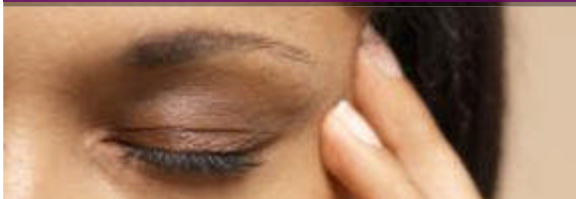
## Healthier by nature

*"I want healthier versions of the foods I love that still taste great"*



## Brain food

*"I want to boost my concentration, focus and mental stamina"*



## Dialling up nature

*"I looking for natural solutions for boosting my health"*



## Mood food

*"I want to the food I eat to make me feel happier"*



# Insight & Innovation

There are a number of opportunities emerging in nutrition space

## Fill me up

*"I want to feel fuller for longer"*



## Food shelf of the future

*"I'm interested in foods and drinks that can help me address my specific health needs"*



## Renewal food

*"I want my body and mind to be restored whilst I sleep"*



## Beauty from within

*"I want to eat foods that help me look my best"*



## High benefit, low impact

*"I want to be able to feed myself and my family, making sure we get the nutrients we need"*

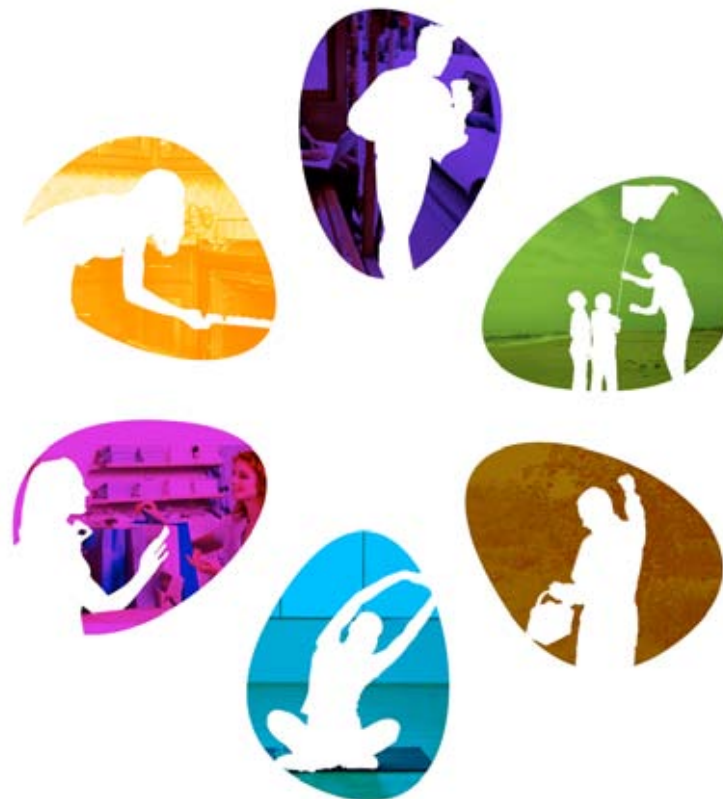


## Designed for me

*"I want solutions that are tailored to me"*



# The consumer trends





A man with dark hair, wearing a dark pinstriped suit jacket over a white shirt, is seen from behind. He is scratching his head with his right hand, suggesting confusion or deep thought. The background is a wall covered with numerous large, black question marks on white paper, creating a sense of uncertainty or a complex problem.

**Why trends?**

**To help organisations make sense of change**

# Why trends?



An inspiration for new ideas and a spur for innovation



# Why trends?

## The benefits:

More...

Outward looking

Forward looking

Consumer focussed

# How we identify and understand trends

An understanding of the macro forces shaping the lives of consumers such as social, technological, economic, environmental and political factors

## Top Down

Can we identify substantial Drivers behind this trend that suggest it will continue?



**TREND**



**Validated  
through research**

Global Streetscaping network: independent, discerning, culturally connected individuals who are spread throughout 40 countries and 60 cities covering every continent of the world

Can we see evidence of this trend at work in brand or human behaviour or attitudes?

## Bottom Up

# Quantitative Research

The Global MONITOR survey covers 28,000 respondents across 21 countries



Online and face-to-face surveying is combined  
in a mixed-methodology approach



# Global Streetscapes: 40 countries and 60 cities worldwide

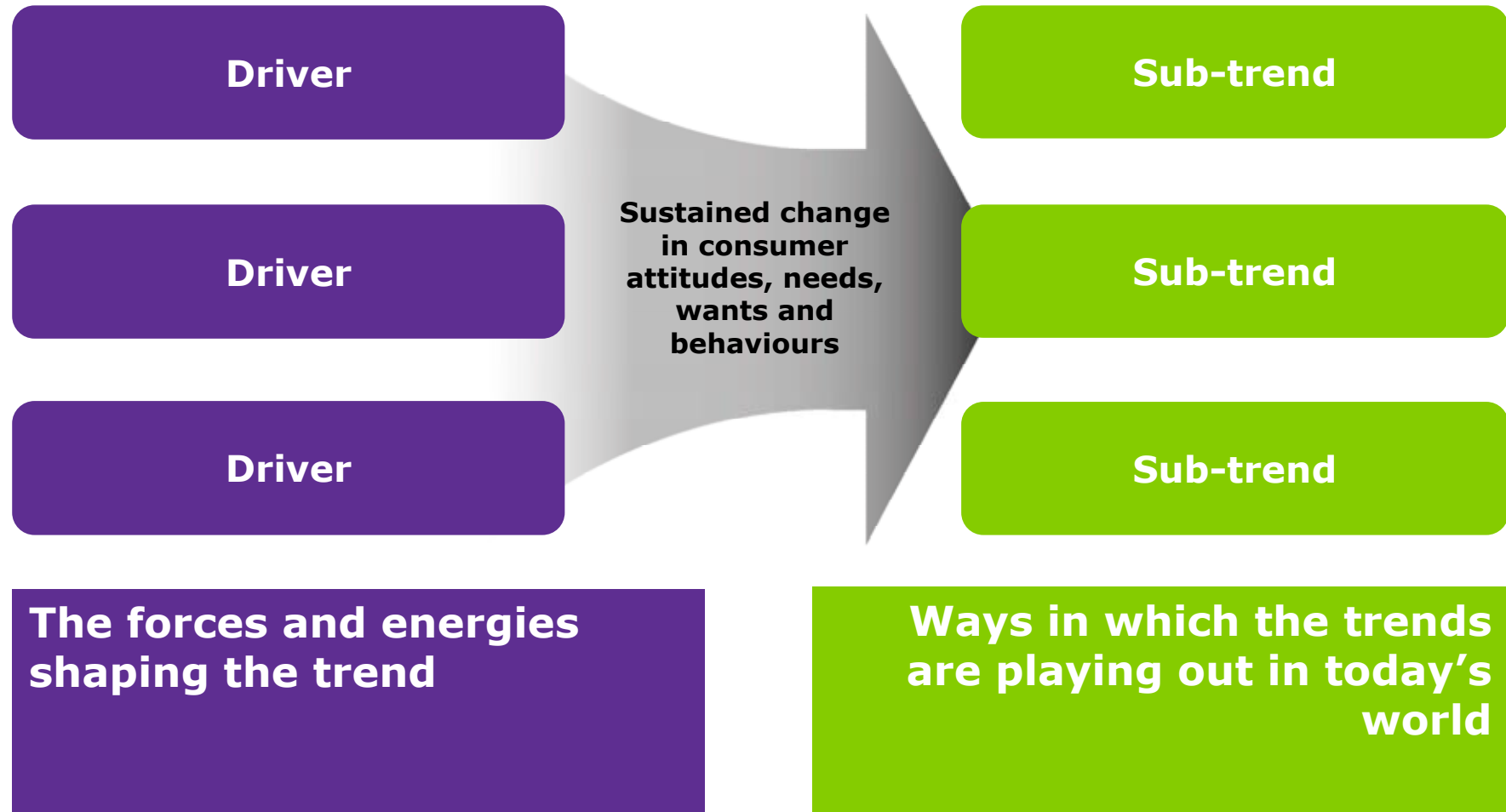


## Global Streetscapes

A global network of trend spotters providing a constantly updated feed of fresh cultural, consumer and marketing insights



## Detailing a trend



# The updated Consumer Lifestyle Trends



*Fluid lives*

"I want to manage my busy life and make sure that I am at my best for whatever the day presents"



*Quest for health and wellness*

"I want a balanced approach to health and wellness, to have greater control through the choices I can make"



*Simple pleasures*

"I want to get more enjoyment from the simple things in life; to have experiences that add more fun and meaning"



*Consumers in control*

"I like to pursue better value, to help maintain my lifestyle and to get the most from the money I have"



*Responsible living*

"I am mindful that I need to live more responsibly; I want to make better choices that make a difference without having to compromise"



*Keeping it real*

"I am looking for products and brands that are real, authentic and honest, because I know I can trust what's in them and where they come from"



## *Fluid lives*

**“I want to manage my busy life  
and make sure that I am at my  
best for whatever the day  
presents”**

**People still look for convenience, but propositions are evolving to give people greater control and flexibility...**



*Fluid lives*



**Rise of home cooking**



# People look to resolve the tension between 'on the go' needs and making good choices



*Fluid lives*



**Globally, sales of healthy snacks are forecast to rise by more than a fifth by 2014**

**Managing energy levels is becoming increasingly sophisticated and a primary need**





## *Simple pleasures*

**“I want to get more enjoyment from the simple things in life; to have experiences that add more fun and meaning”**

**Living life to the maximum has become less important as harder economic times has revealed new priorities...**



**Brands tapping into the happiness movement by lifting the spirits**

**São Paulo free water balloon fight**







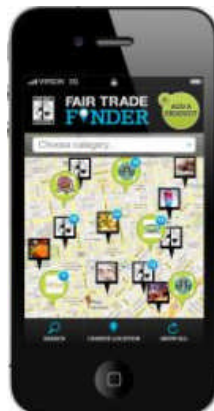
## *Responsible living*

**“I am mindful that I need to live more responsibly; I want to make better choices that make a difference without having to compromise”**

# Fair treatment for animals and people is moving more mainstream



Walmart has recently announced plans to offer 500 fairtrade products in its stores by 2016, Global



Fairtrade Finder, a crowd-sourced app helps consumers locate fairtrade products in their area, USA

# People look for more conservation of resources



**Water conserving  
agriculture, Dubai**



**Renewable packaging,  
Brazil**



## *Quest for health and wellness*

**“I want a balanced approach  
to health and wellness, to  
have greater control through  
the choices I can make”**

# People are finding it more difficult to manage their physical and emotional wellbeing

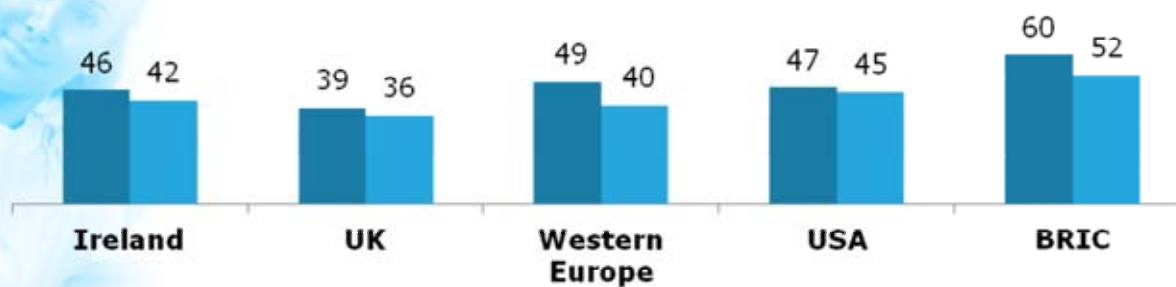


*Quest for health  
and wellness*

## 'I am satisfied with my physical health'

% Agree

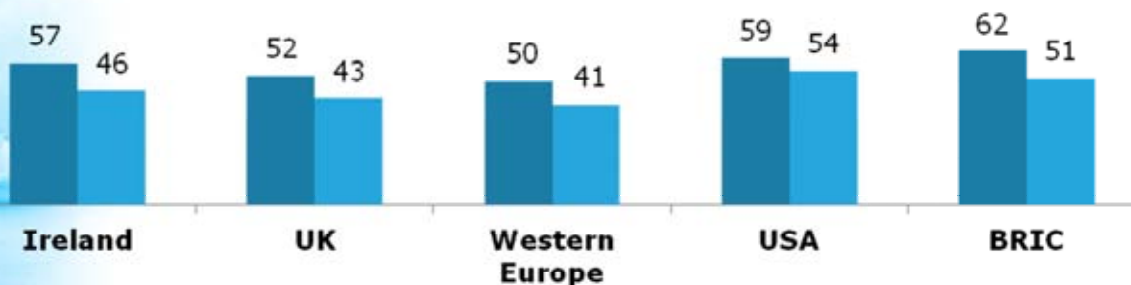
■ 2010 ■ 2011



## 'I am satisfied with my emotional health'

% Agree

■ 2010 ■ 2011



**The mobile health  
apps market  
experienced seven-  
fold growth in  
2011, growing to  
\$718 million**



# Food 'baddies' are increasingly being demonised and 'natural' still resonates very strongly



*Quest for health  
and wellness*



**Concern remains over  
artificial additives**



*Consumers in control*

**“I like to pursue better value,  
to help maintain my lifestyle  
and to get the most from the  
money I have”**

# Consumers now have more tools and options than ever to make savvier choices



## Rise of offer culture



## A new breed of own-label has emerged

“This is a different recession than the one that spawned the honest, stripped down values of the Value range. Tesco’s rivals have moved beyond the idea of basics and, with ranges like Waitrose Essentials and Morrisons’ M Savers, put the emphasis on affordable quality.”

**Management Today, April 12th 2012**





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*Keeping it real*

**“I am looking for products and brands that are real, authentic and honest, because I know I can trust what's in them and where they come from”**

# 'Seasonal' and 'local' have become bywords for quality and trustworthiness



**Seasonal is equated with better quality**



**Growing focus on local produce**

The challenging times of the last few years are set to continue

People have proved resourceful and able to adapt. The result is that we have a more food engaged consumer than ever before

People will continue to look behind the scenes to better understand the value of the food they buy. Value will continue to be heavily scrutinised

But, people will embrace new ideas that offer healthy, nutritious and convenient alternatives

Quality food is still in high demand but the benefits have to be tangible to demand a premium price

# Activation





# Branding WORKBOOK

A consumer focused approach to building a strong brand

Growing the success of Irish food & horticulture

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Irish Food Board

# Insights & Innovation WORKBOOK

A consumer-focused approach to bringing new products to market

Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board

Innovation is basically about  
making money from your ideas.

# Why innovate?

Innovation of new products, services and brands that *really connect with consumers* gives you the opportunity to move into higher margin areas, to have more protectable income streams and to build a strong, valued relationship with the retailer.



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