

# Consumer and Cultural Change

**Consumer  
Insights Team**

Growth through consumer understanding



Grace Binchy, Consumer Insight Team  
*Cultural Change & The Implication for Irish Brands*

Growing the success of Irish food & horticulture

**Bord Bia**  
Irish Food Board

# **Understanding deeper cultural dynamics**

**The new consumer outlook**

**Evolving cultural elements**

**Implications for brands**

# Understanding deeper cultural dynamics

**1.The new consumer outlook**

2.Evolving cultural elements

3.Implications for brands

The *era* of  
**REALISM**

# **Era of Indulgence (pre 2008)**



**Celtic Tiger period**

**Record lows of  
unemployment**

**Property boom**

## Era of Indulgence (pre 2008)



Celtic Tiger period

Record lows of  
unemployment

Property boom

## Recession Consumer (2008 – 2012)



False dawns - double and  
even triple dips!

Cutbacks and  
austerity measures

Debt becomes a burden  
and cheap credit vanishes

## Era of Indulgence (pre 2008)



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## A New Realism (2013 – )



No expectation of a return  
to strong growth

Inflationary pressure  
squeezes incomes

Living within our means

## Era of Indulgence

## Recession Consumer

## A New Realism

Sensibility

Exuberance

Anxiety

**Vigilance**

Ambition

Trading Up

Economising

**Responsibility**

Mindset

Bullish

Sober

**Resourceful**

Passion

Accumulation

Frugality

**Prioritisation**

Orientation

Self-expression

Self-  
preservation

**Connection**

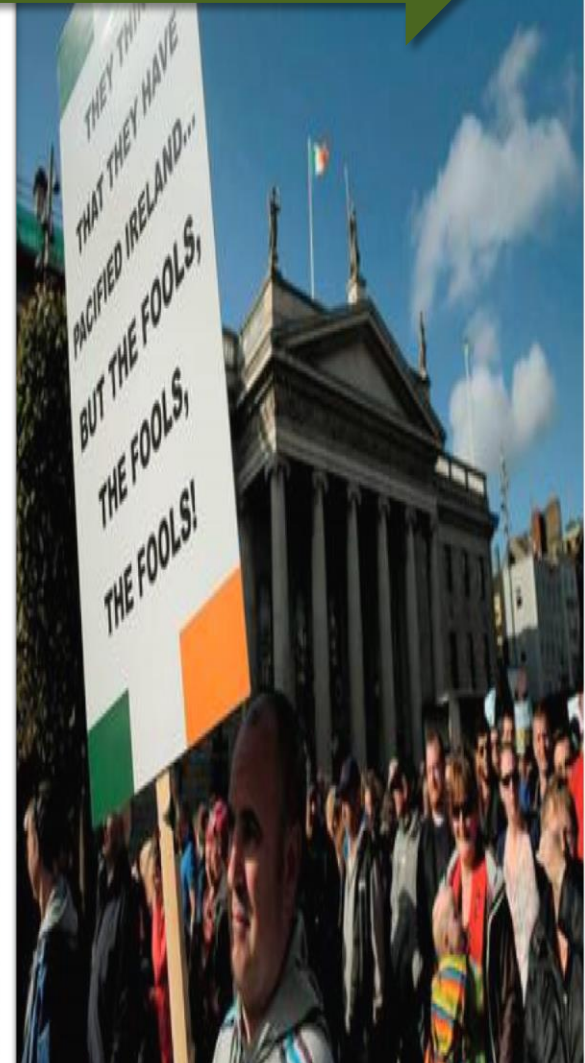




## Economic consolidation



## Ongoing distrust in institutions





# Irish people feel more in control of their life again and approach future uncertainties with a more positive attitude

Stabilised economy and the renewed possibility to project into future

Over three-quarters of Irish consumers agree **“we should focus more on the future rather than concerning ourselves with what has happened in the past”**

Euromonitor 2013



Having weathered the storm means feeling able to survive anything

“Be as self-reliant as possible will better increase chances of succeeding in today's world”

Global MONITOR 2012

56%

Global  
Average

66%

Ireland

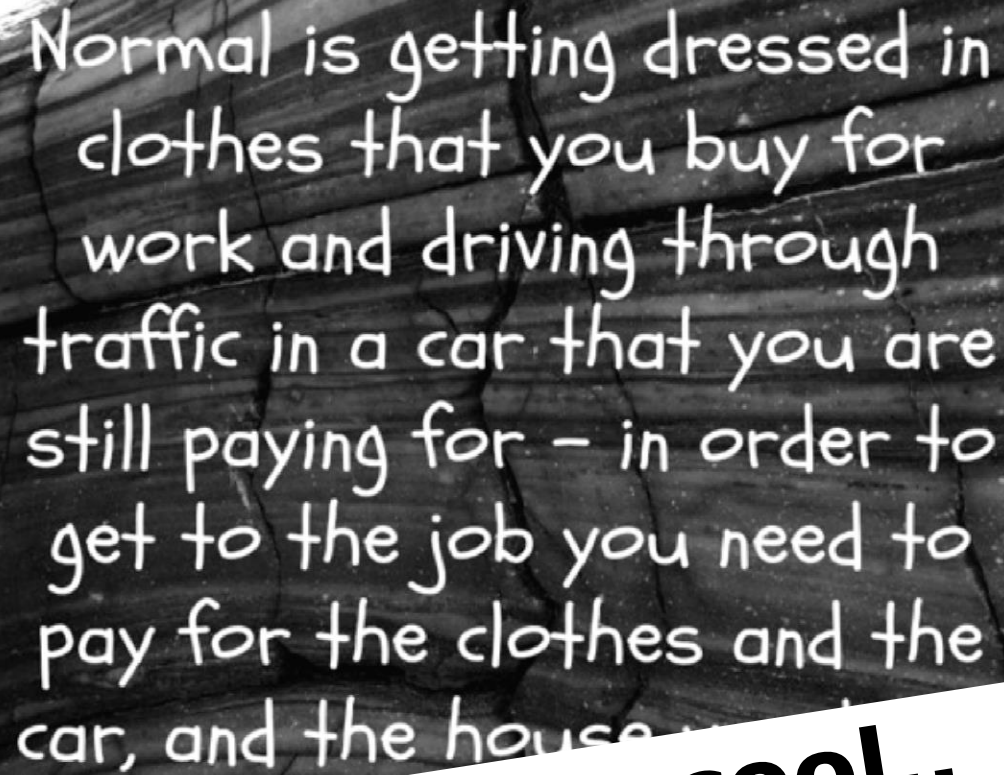
“

**Consumers have reached a plateau of stability ...**

**Their objective has shifted from surviving to thriving in a new reality.**

”

**Having experienced  
the Celtic Tiger days, consumers have  
emerged cautious but savvy looking for  
indulgences again**



Normal is getting dressed in  
clothes that you buy for  
work and driving through  
traffic in a car that you are  
still paying for - in order to  
get to the job you need to  
pay for the clothes and the  
car, and the house...

**Normal is the new cool..**



Goodman

[www.nomorehamsterwheel.com](http://www.nomorehamsterwheel.com)



**It's all  
about  
every day  
HIGH  
quality  
now**

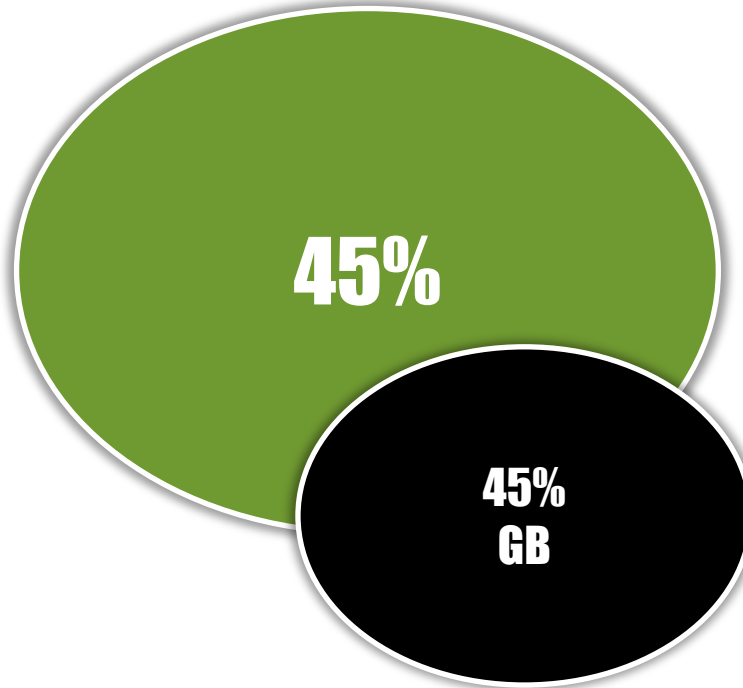




**Consumers need  
to feel sure they  
have made the  
right  
choice**

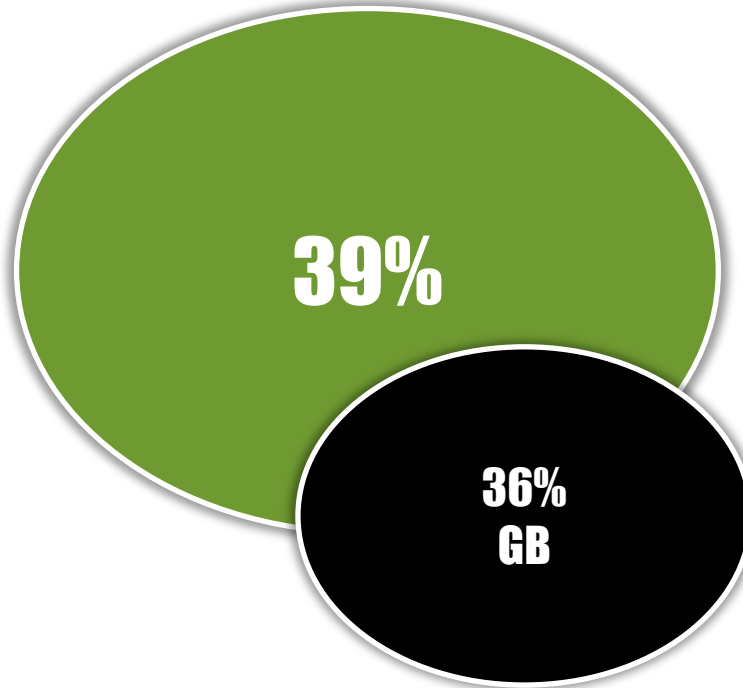


# Grocery Lists




*'I make a grocery list and stick rigidly to it'  
compared to 35% of Baby Boomers*

# Special Offers



*‘Look up special offers on the grocery store website’  
compared to 28% of Baby Boomers*

# Opportunity for Irish Brands



With savvy consumers making increasingly smart choices, how can we stand out and ensure that people feel they are getting value and small indulgences?

# Brands tapping into this





Ireland's finest selection of  
Whiskeys, Wines and Spirits

Celtic Whiskey Shop

&

WINES ON  
THE GREEN

Fine Wine Store

Celtic Whiskey Shop

WINES ON THE GREEN

Celtic  
Whiskey Shop  
←  
Ireland's Whiskey  
Specialists  
Wines  
Champagne

# Understanding deeper cultural dynamics

1. The new consumer outlook

**2. Evolving cultural elements**

3. Implications for brands



**A number of cultural themes have emerged**

**Enterprising Energy  
Cohesive Community  
Dynamic identities  
Reframing experiences**

Enterprising  
**Energy**



**Creative micro  
entrepreneurs  
are thriving and  
questioning  
traditional measures  
of success**

**SUCCESS**





# There is a lot more recognition in the value of creativity

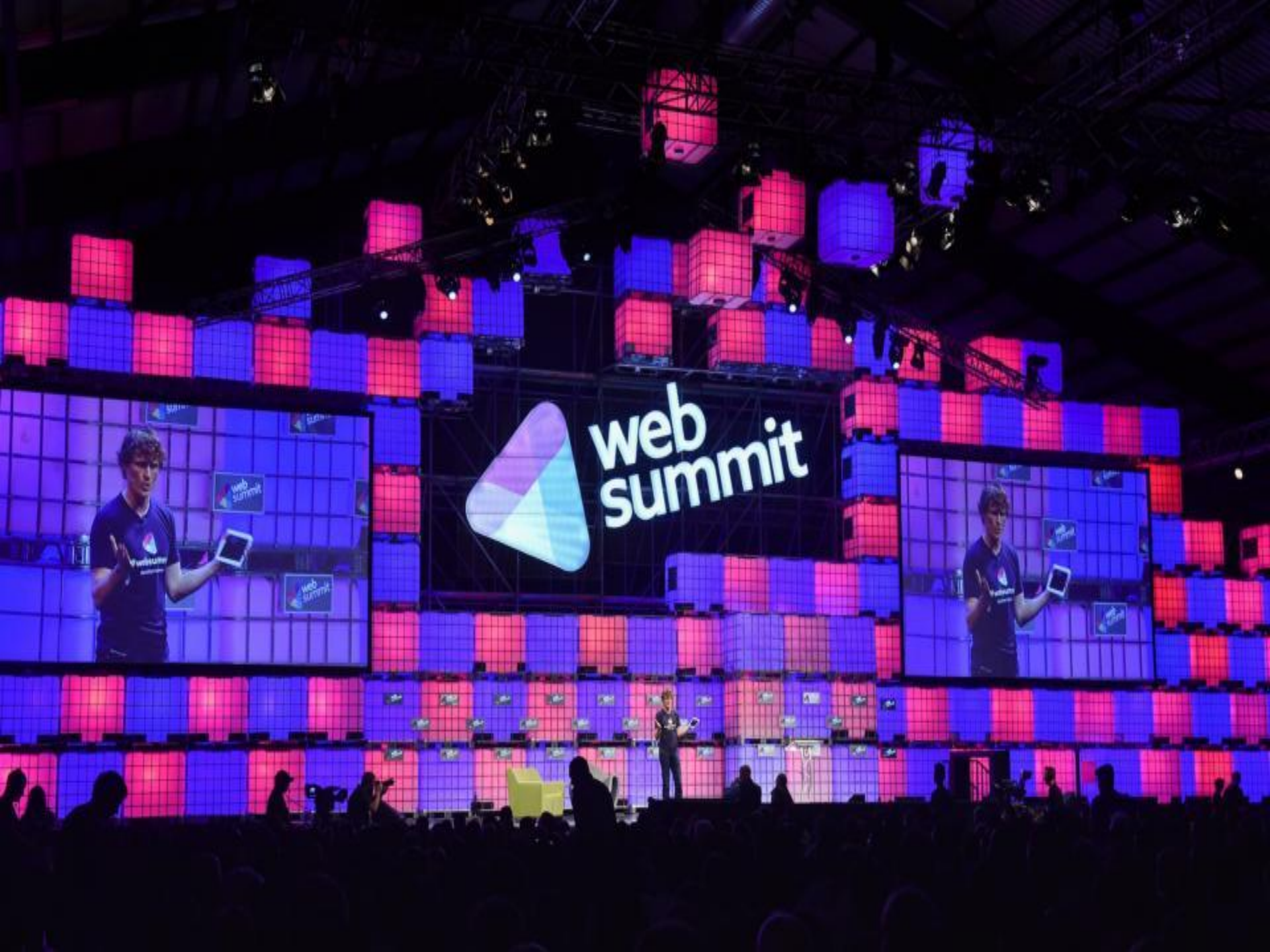


# Opportunity for Irish Brands

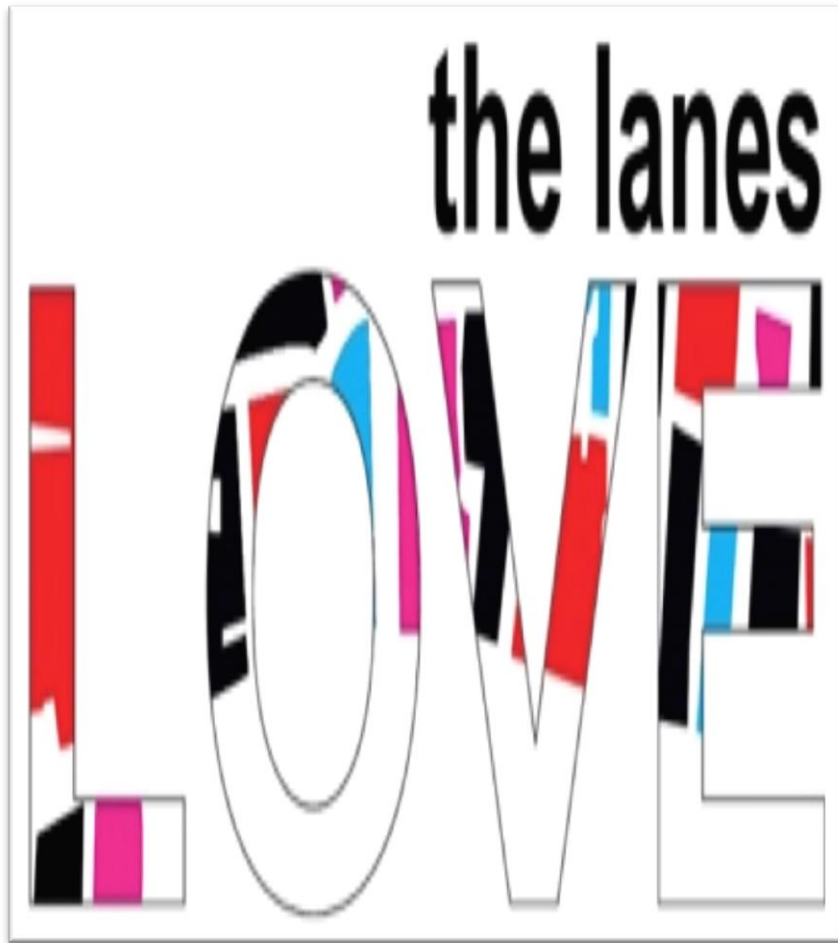


As young entrepreneurs become the voice of an evolving Ireland, how can we involve them to develop the country's emerging identity together?  
How can we celebrate our creativity?





## Enterprising Energy ...







THOMASTOWN  
TOWN OF FOOD

**SuperValu**  
Real Food, Real People

**CALOR**

Cohesive

**Community**

“

**Social connections have  
re-emerged as a key source of  
value**

”



**I consider it to be a sign of success or accomplishment  
to have a large group of friends. (% Agree)**

**76%**

2014  
Ireland

**67%**

2014  
GB

# Millennials place an important value on friendship

*'I enjoy getting friends together for a meal I've made'*

**56%  
ROI**

**56%  
GB**

*'While there's many things I'd like to own, I'd prefer to spend my money on experiences I can share with others'*

**65%  
ROI**

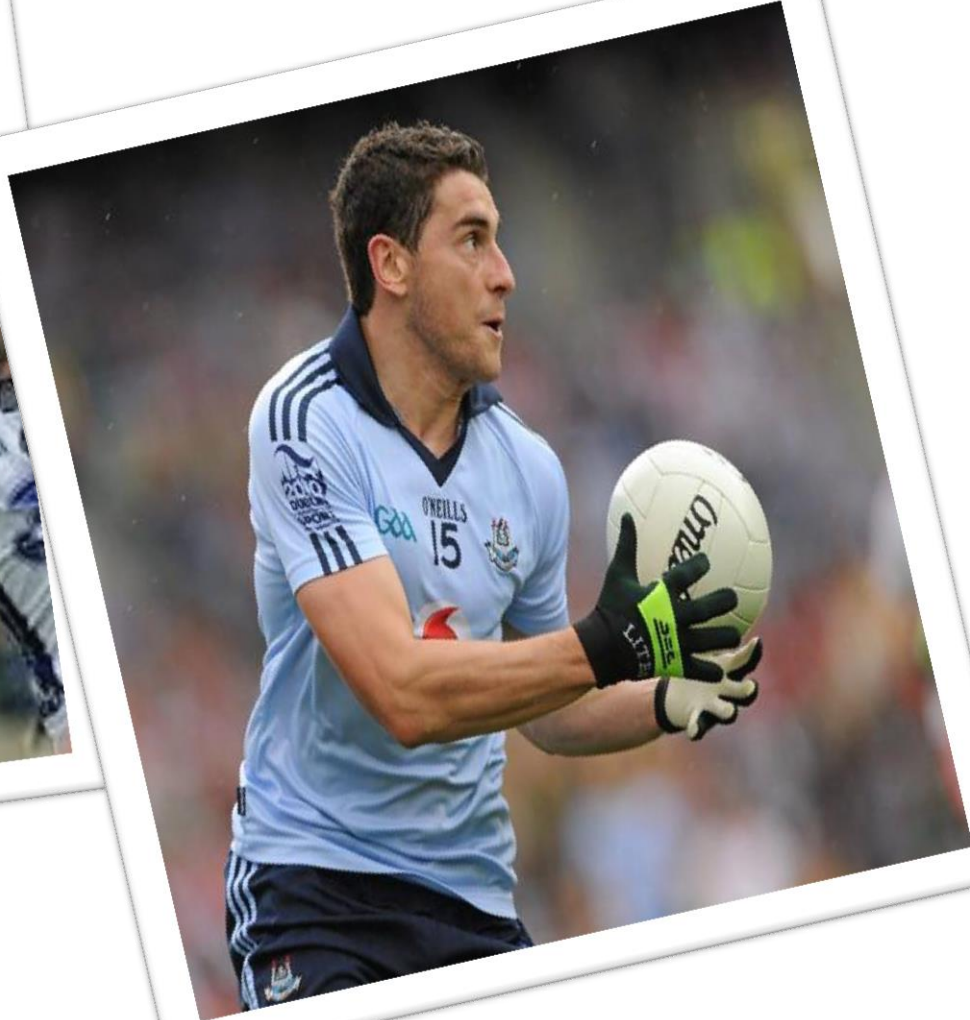
**61%  
GB**

*'Food and drink is a really important way to bring people closer'*

**70%  
ROI**

**68%  
GB**

# Cohesive Communities provide a platform for people to connect



# Real Connections:

Real time with real  
people

frustration finding the time  
to maintain real  
connections

technology dominated by  
fairly impersonal and  
vacuous interactions

desire to create the space  
and time for real  
conversations





**As the level of trust in institutions remains low, local communities are ever more important in rebuilding confidence**

**BIG INSTITUTIONS**

**LOCAL COMMUNITY**



**Faceless  
Arrogant  
Technocratic  
Greedy  
Unreliable  
Dangerous  
Opaque  
Single-minded**

**"I believe I know someone I  
could rely on in time of need"**  
OECD BETTER LIFE INDEX 2014

**Well-known  
Welcoming  
Human  
Generous  
Timeless  
Harmless  
Transparent  
Caring**

**89%**

Global  
Average

**95%**

Ireland

# Opportunity for Irish Brands



**It is no longer about building brands, it is now about building brand communities**

# Opportunity for Irish Brands



**Brands need to demonstrate that  
they have meaning purpose and  
soul**

# Brands tapping into this











Dynamic

# Identities

**“**

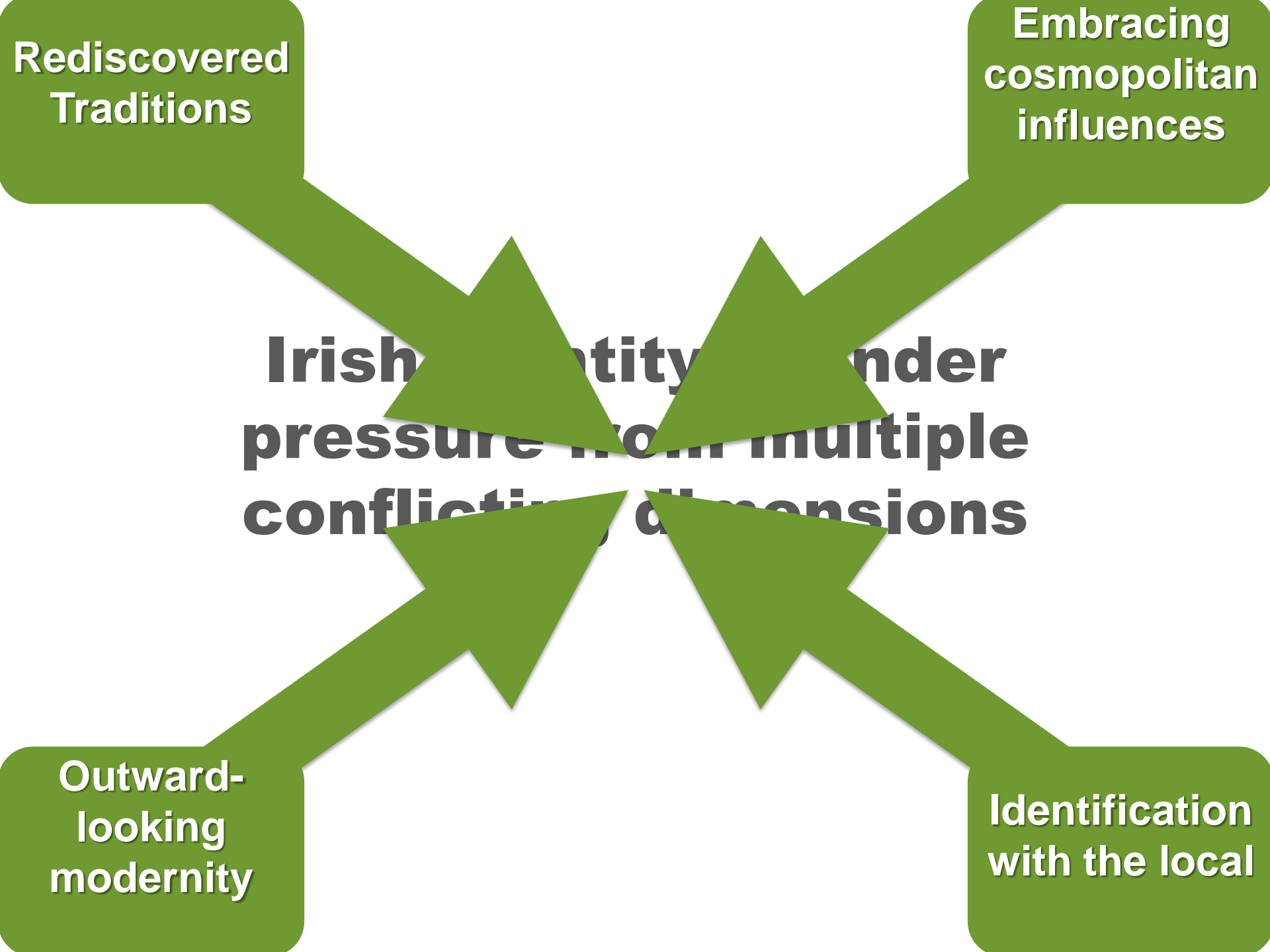
**With the economic crash,  
it was not only the money that has  
been lost but also  
a sense of self**

**”**





CELTIC  
KITTY  
R.I.P.



**And our modern Irish identity is slowly forming through diverse cultural influences, but at the same time still needs to deal with its fear of the “unknown”**

Less racism

Less quaintness

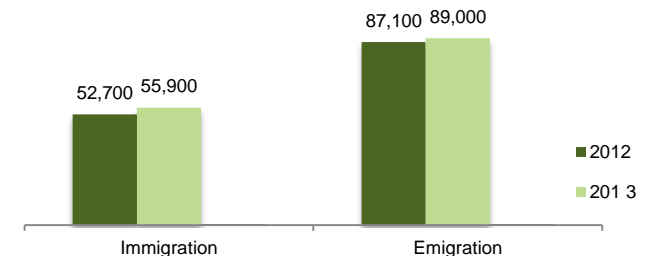
New possibilities

Integrating Europe

New ways to do things

A brighter future?

**Total Irish migration 2012-2013**



Source: [www.cso.ie](http://www.cso.ie)



**A complex identity is emerging  
which seeks  
out local inspiration but is open to  
outside influences**



**The millennials are the first  
truly global generation**



I worry that the values and traditions that I most appreciate about my country are being eroded by other cultural / global influences. (% Agree)

56%

Global  
average

55%

2014  
GB

44%

2014  
Ireland

**IRISH  
DESIGN  
SHOP**

**41**

**New businesses and brands are solving the tension between traditional and modern Ireland by defining a new creative and crafty Irish identity**



# Opportunity for Irish Brands

IRISH  
DESIGN  
SHOP

41



As the Irish identity evolves, how can we blend together its traditional roots with its emerging modern representations?



# Brands tapping into this









## Specials

Soup & Sandwich Combo

- Celery & Cauliflower Soup €12.50
- Hot roast Beef sandwich

Pie of the Day €11.

- Venison, Veal & Beef

Dessert of the Day €6

- Custard & Nutmeg tart



**BLACKS**  
**OF KINSALE**

A black silhouette of a crow or raven is perched on the right side of the word "BLACKS". The bird is facing left, with its head turned slightly towards the viewer. Its wings are spread, and its tail feathers are visible. The bird is positioned to the right of the word "BLACKS", with its feet gripping the bottom of the letter 'S'.



Reframing

**Experiences**

“

**Experiences are taking on a new importance and dimension**

”

# Exhilarating Discovery:

## Desire for new experiences

actively seeking new  
experiences.

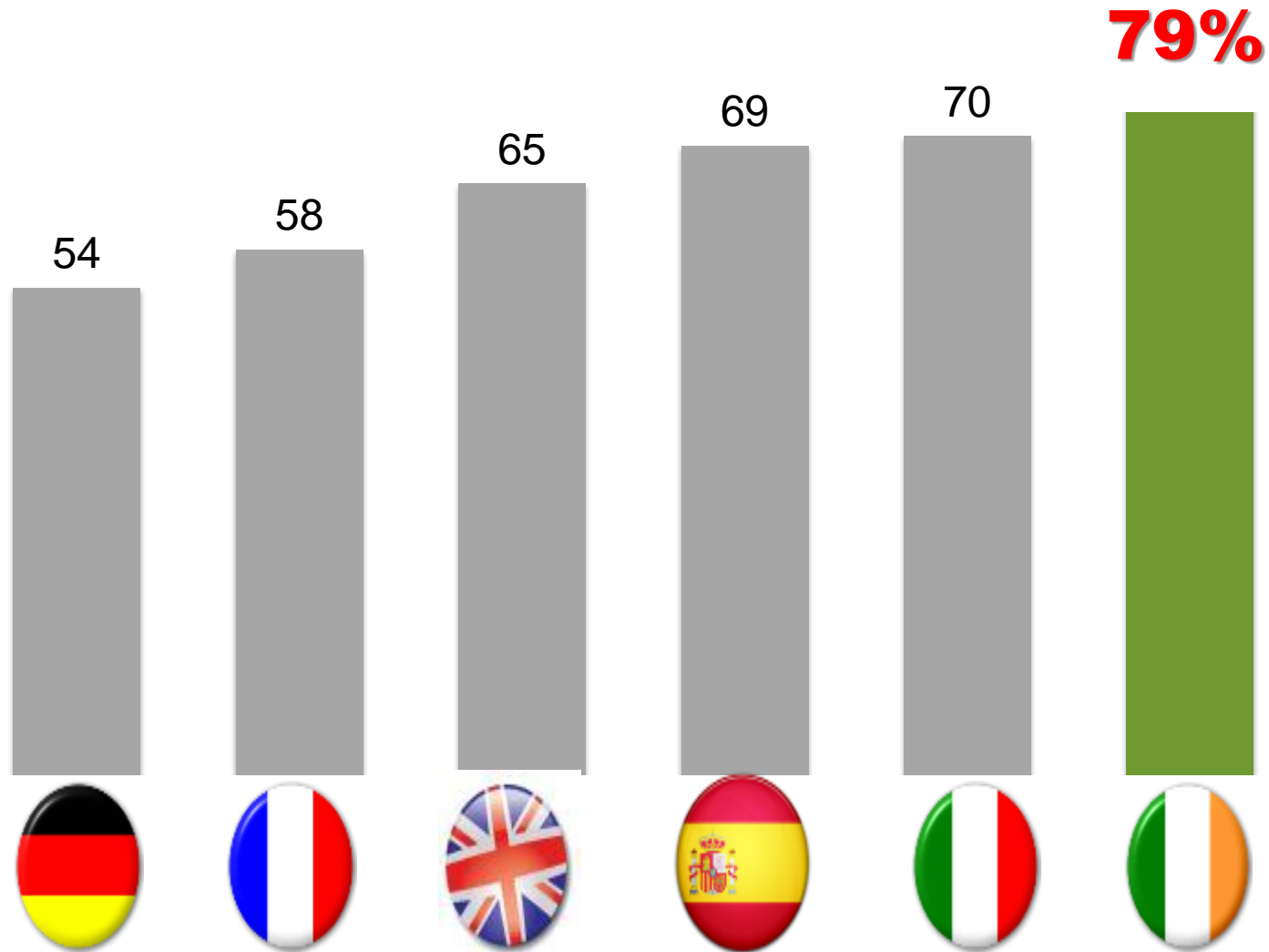
buzz of doing something  
new

need exhilarating tales to  
tell

not missing out by  
choosing to stay put



I like to try new products and services

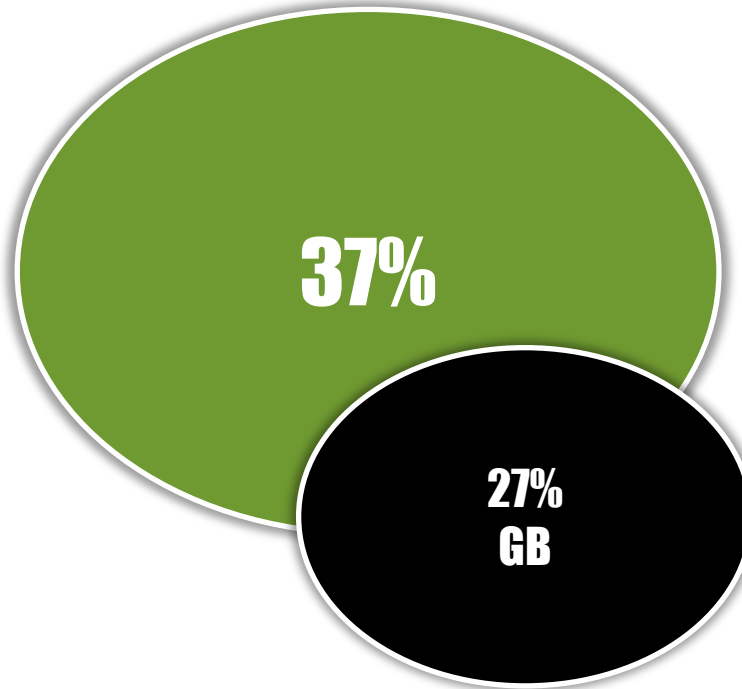




**Food and drink is very much part of the desire for new experiences**



# Choice in Supermarkets



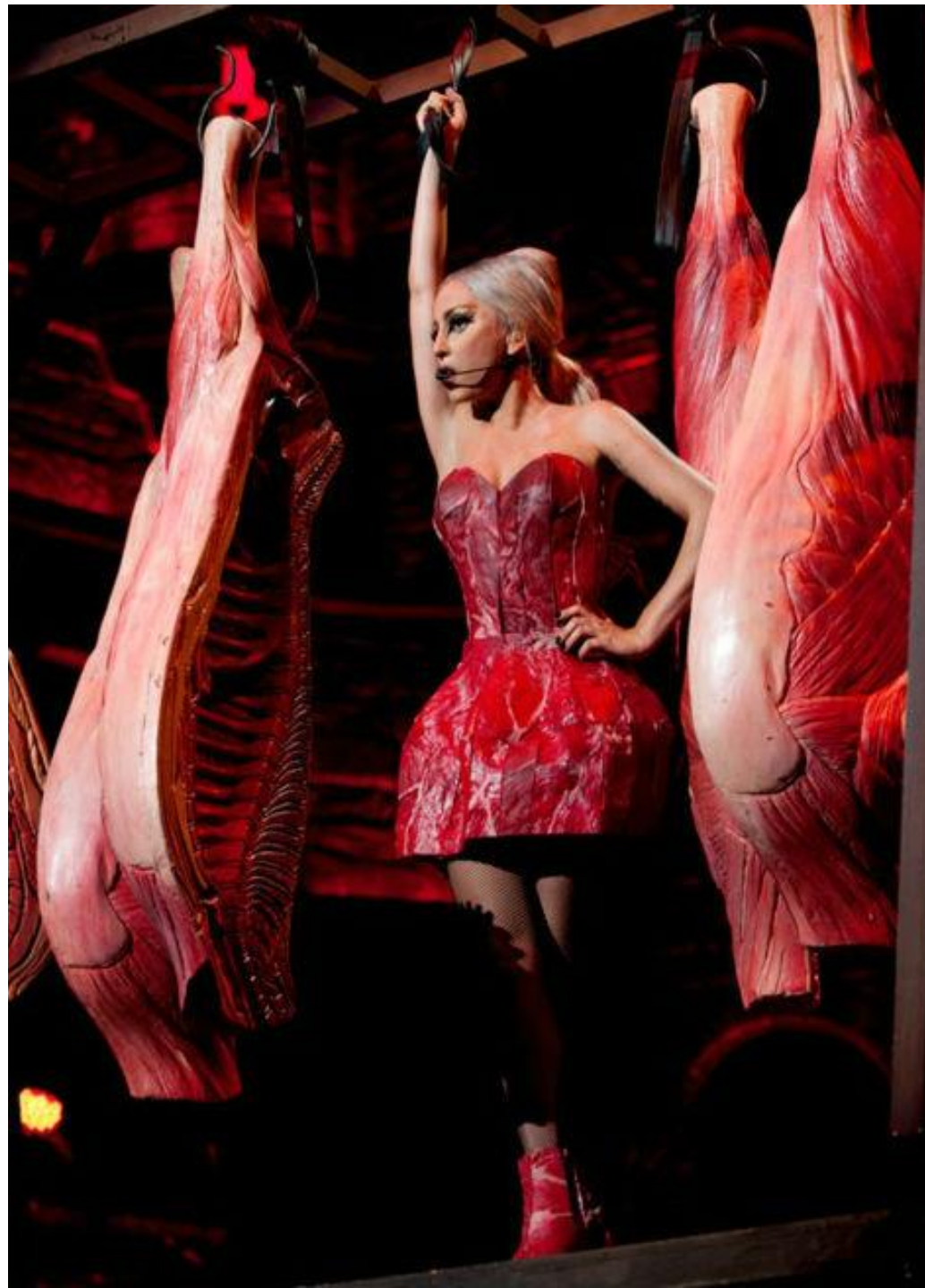
*Agree that 'There's not enough choice in Irish/British supermarkets'  
compared to 24% of Baby Boomers*

# Experiential shopping...

Average # of times visited per month (ROI)

	Millennials	Gen X	Baby Boomers
Farmers Market	1.5	1.1	0.7
Health food store	1.8	1.1	0.5
Ethnic Food Store	1.6	1.3	0.4
Specialist off-license	1.9	1.2	0.6

***Millennials have  
firmly added  
food and drink  
as a way of  
expressing who  
they are  
becoming.***







PHOTO



daviddeeley

🕒 29s



🤍 Like

💬 Comment



# Opportunity for Irish Brands

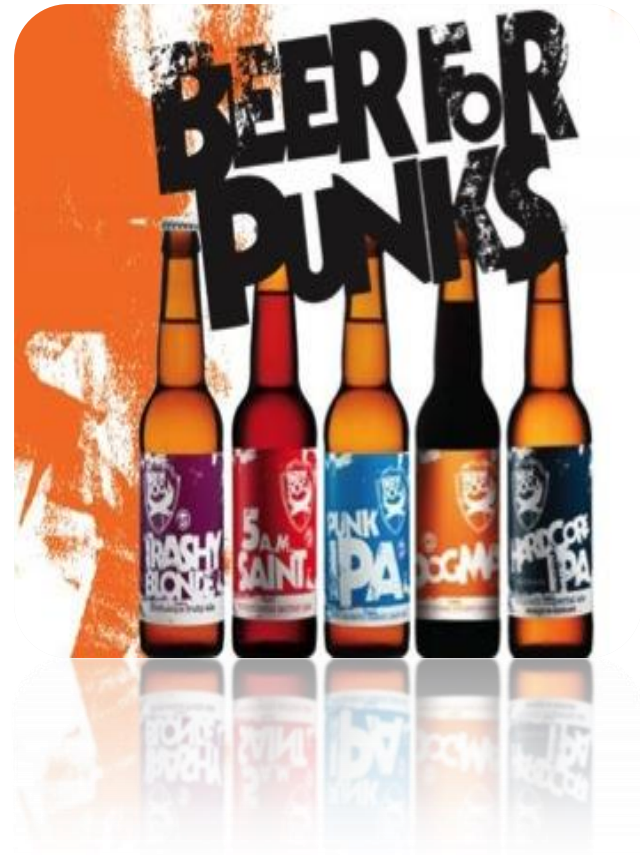
IRISH  
DESIGN  
SHOP

41

How can brands help people express themselves?

How can they tap into this desire for more exhilarating experiences?

# Brands tapping into this



# Understanding deeper cultural dynamics

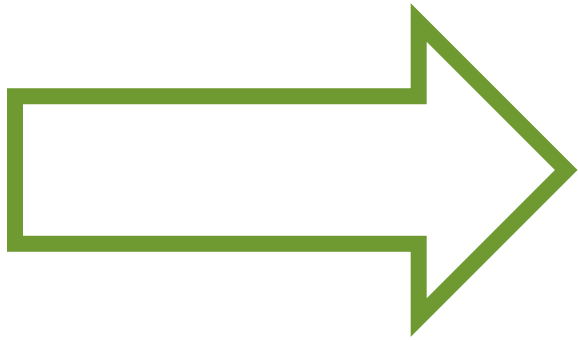
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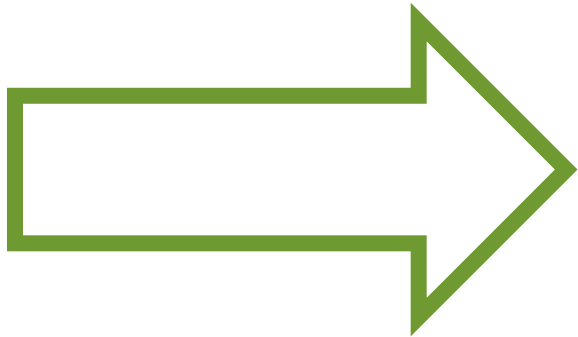
**3. Implications for brands**



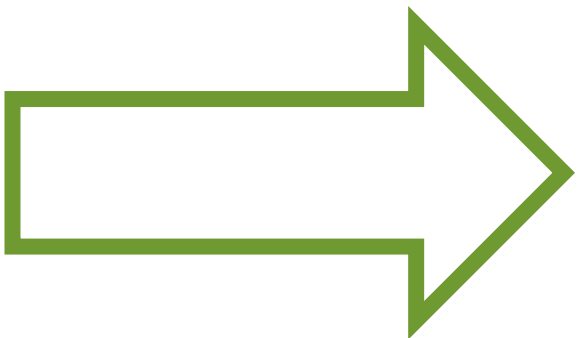
# The evolving Irish identity is opening up new opportunities for brands



As consumers have overcome the recession and reached an economic plateau, we should offer them **new and exciting products that are going to live up to their expectations without breaking their bank**



As the savvy consumer attitude is here to stay, in the future **we should offer small affordable indulgences to solve the desire for high quality products with a limited budget**



As Irish people proudly live and breath their heritage we should make sure we **focus on celebrating Irishness in every aspect of their every day life**

# The evolving Irish identity is opening up new opportunities for brands



As the Irish identity is constantly evolving we should represent every face of it, **blending together it's traditional roots and its modern transformation**



As there is an increasing desire to connect we need to find ways **to bring people together with a sense of purpose and in a way that enhances community values**



As young entrepreneurs are the driving force and the voice of the changing Ireland we should **involve them more to develop together the new image of the country**

## **But Irish brands need to create better, more meaningful connections with their consumers**

How can Irish brands build trustful and transparent relationships with their customers and their increasingly important local communities?

How can Irish brands cater better to the cultural diversity of Modern Ireland? What are the best ways to celebrate the different influences?

How can Irish brands help consumers bridging traditional and modern Ireland, and actively shape the new Irish identity?

How can Irish brands remain relevant to both younger and older target audiences, and actively support the formation of a young, modern Irish identity?

# Consumer and Cultural Change

**Thank You**