Understanding consumer perceptions of Irish strawberries

16th December 2016
Agenda

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

To understand consumer perceptions of Irish grown strawberries
**Methodology**

**Groundwork**

*Desk Research*

To provide a background understanding of the category

**Quantitative**

*Online Survey*

1000 respondents

Nat. Representative

To quantify levels of consumer awareness & purchase behaviours for strawberries

**Qualitative**

*Online Community*

7 Days

14 Respondents

To gain a deeper understanding of behaviour & perceptions of strawberries
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

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<tr>
<th>Age</th>
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<th>Sex</th>
<th>Location</th>
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<tr>
<td>25-34</td>
<td>Pre-Family</td>
<td>Mixed</td>
<td>Dublin/Cork</td>
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<td>35-44</td>
<td>Family</td>
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<td>45-54</td>
<td>Older Family</td>
<td>Mixed</td>
<td>Dublin/Cork</td>
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Differences in life stage but similar attitudes prevailed around

Strawberry behaviour
Perception of Irish strawberries
Anticipation of Season
Strawberries are a very emotive fruit, consumers await the new season with *anticipation*.

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

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

“I want to achieve a holistic approach to physical health and emotional wellbeing”
Diet perceptions

Of consumers aspire to lead a healthy lifestyle

87%

Source: PERIscope 2015

My Diet is …

Very healthy

Fairly healthy

Not sure

Fairly unhealthy

Very unhealthy

Don’t know

ROI 2015

26

61

9

4
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
“I am looking for products and brands that have real, authentic and honest origins”
Keeping it Real

Naturally authentic
Desire for products that are ‘as nature intended’

Genuine provenance
Provenance becoming the ultimate marker of quality
Qs. What extent do you check for country of origin, i.e. what country the food was produced in?

- **Always check**: 31%
- **Sometimes check**: 43%
- **Never check**: 25%
- **Don’t know**: 1%

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

*Source: PERIscope 2015*
Quality of fresh food is more important than price

<table>
<thead>
<tr>
<th></th>
<th>% agree slightly</th>
<th>% agrees strongly</th>
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<td>2015</td>
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<td>41</td>
<td>77</td>
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<td>2011</td>
<td>40</td>
<td>38</td>
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</table>

Source: PERIscope 2015
Quality Labels

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

- Always check: 28%
- Sometimes check: 46%
- Never check: 24%
- Don't know: 1%

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

Source: PERIscope 2015
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94% of all adults claim to eat strawberries.

The average annual consumption is 49 times per year.

Source: Quantitative Omnibus Nov 16
Frequency of eating strawberries

Qs. How often do you eat strawberries?

- Everyday: 3%
- 4-5 times per week: 10%
- 2-3 times per week: 15%
- 2-3 times a month: 18%
- Once a month: 14%
- Less often: 31%
- Never: 6%

Source: Quantitative Omnibus Nov 16
Regular consumers

- Everyday: 3%
- 4-5 times per week: 10%
- 2-3 times per week: 15%
- Once a week: 18%
- 2-3 times a month: 14%
- Once a month: 15%
- Less often: 31%
- Never: 6%

31% of consumers

Regular eaters are those eating weekly.

They represent just under 1 in 3 consumers.

Source: Quantitative Omnibus Nov 16
Occasional consumers are those less often. They represent just under 3 in 5 consumers.

- **Everyday**: 3%
- **4-5 times per week**: 10%
- **2-3 times per week**: 15%
- **Once a week**: 18%
- **2-3 times a month**: 14%
- **Once a month**: 31%
- **Never**: 6%

**63% of consumers**

Source: Quantitative Omnibus Nov 16
### Who is eating strawberries?

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**Females are more likely to consume strawberries than males**
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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
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**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

| Average Consumption p.a. | 49 | 58 | 51 | 47 | 52 | 50 | 51 | 41 |
Who is NOT eating strawberries?

<table>
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**1 in 4 consumers aged 18-34 are consuming strawberries less often than on a monthly basis.**
Who is NOT eating strawberries?

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Why are they consuming?

Taste

The core benefit to strawberries is the taste. They are sweet & juicy and seen as a treat. Strawberries are a crowd pleaser.
Strawberries are versatile in their usage, they can be used as a stand alone eat, an ingredient, a topping or a dessert.
Why are they consuming?

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

**Occasion**

<table>
<thead>
<tr>
<th>Snack</th>
<th>Breakfast</th>
<th>Dessert</th>
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<tbody>
<tr>
<td></td>
<td><strong>Porridge</strong>&lt;br&gt;<strong>Yoghurt</strong>&lt;br&gt;<strong>Muesli/Granola</strong></td>
<td><strong>With Cream</strong>&lt;br&gt;<strong>Cakes</strong>&lt;br&gt;<strong>Weekend baking</strong></td>
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</table>
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.
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.
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
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
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
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 greengrocer 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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- Communications
- Recommendations
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.

<table>
<thead>
<tr>
<th>Perception</th>
<th>% Agree slightly/strongly</th>
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<tr>
<td>Food produced locally results in higher quality products</td>
<td>75%</td>
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<tr>
<td>I like to know the area where my food comes from</td>
<td>71%</td>
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<tr>
<td>I think food produced locally has less preservatives and artificial ingredients</td>
<td>68%</td>
</tr>
<tr>
<td>I feel food produced in my local area is better for my health</td>
<td>68%</td>
</tr>
</tbody>
</table>

Source: PERIscope 2015
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
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*
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*
Irish strawberry associations

We asked them how they would describe an Irish strawberry:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste</td>
<td>Sweet, Juicy, Refreshing</td>
</tr>
<tr>
<td>Visual</td>
<td>Shiny &amp; red</td>
</tr>
<tr>
<td>Size</td>
<td>Large, big, plump</td>
</tr>
<tr>
<td>Availability</td>
<td>Taste improves even further in summer</td>
</tr>
</tbody>
</table>

I think we have excellent quality strawberries, especially in summer

Niamh
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
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

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

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

Communications

Recommendations
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.
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
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
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
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 I worry that my children don’t enough of it

Triona

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

Jacqualine
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.

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.

Elaine, 29

I hadn’t really thought of it, but now I will try to buy more homegrown food

Fintan, 33
Agenda

- Background
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- Communications

Recommendations
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...
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 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.

It’s summer again!
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?
Thank you
Understanding consumer perceptions of Irish strawberries

16th December 2016