



The Thinking House
BORD BIA INSIGHT CENTRE

Local Food

Understanding Consumer Attitudes

February 2017

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Background



Objectives



To provide a better understanding of Irish consumer attitudes & purchase behaviour to *local food*

Definition of Local Food



Attitudes toward purchasing & consumption of local food



Drivers of purchasing behaviour within the local foods category



Awareness & experience with *local food* within retail



Research Partner



c **o** y n e
RESEARCH

Approach



Qualitative



6 Focus Groups

5 Locations

Netnography



Data Mining

Last 6 Months

Quantitative



Online Survey

1,000 Irish adults

20 minutes

Who did we speak to?



Qualitative

Group	Age	Lifestage	Social	Location	Sex
1	25-35	Young Professionals	ABC1	Dublin	Mixed
2	50+	Empty Nesters	C1C2	Galway	Female
3	36-49	Family	ABC1	Sligo	Female
4	36-49	Family	C1C2	Dublin	Female
5	25-35	Young Professionals	ABC1	Cork	Mixed
6	50+	Empty Nesters	C1C2	Tipperary	Female

Quantitative

Quotas were set on age, social class & region to ensure that the sample was nationally representative of the national population. The base was 1,000 consumers aged 18+



Headlines



#1



The meaning of local continues to be about people, place & small scale

Local' continues to be all about people.

- The epitome of 'local'.
- Provides a personality to the brand/product.
- Supporting the 'little guy' rather the 'monster' brands.
- Linking the product/brand back to a particular person (and often location); bodes well at encouraging purchase.

Continued associations with small scale and 'homemade'.

- True 'local' = small.
- Where the product/brand is from continues to be somewhat irrelevant – it is 'local; to that particular area once it is produced on a small scale.
- However; some consumers continue to think of mass-market brands as 'local' (due to location).
- Imperfections heighten 'homemade' associations.



Support of Local Food fits with contemporary food culture

#2

The support for 'local' providers continues to grow, whereby the 'local' entrepreneur remains highly valued.

- Love to see someone 'local' doing well.
- A sense of contribution to the overall success.

Growing preference for transparency and authenticity.

- Cooking from scratch.
- Maintaining a healthy lifestyle.
- Having more adventurous tastes

#3



***Local Food* has become more widely available**

Local food has become more widely available in recent times.

- No longer have to wait to purchase at Farmers Markets.
- SuperValu playing a key role – acting as the ‘hero’ supermarket for ‘local’ food/producers
- Local producers have built trust with consumers so much so that trust has been lifted as a barrier to local.
- Consumers are hungry for this availability and local food is evolving to become a more mainstream behaviour and a more routine purchase.



#4

**Shoppers are
beginning to loosen
the purse strings**

In 2010 it was all about using farmers markets and local producers as a way to cut out the middle man and to find a bargain. You may had a bit of extra meat thrown in or a deal on veg.

Today, we are seeing a loosening of purse strings. Particularly those with no dependents. The likes of young professionals have more disposable income to spend on luxury local food products.

#5



The key local food categories remain unchanged

The key categories within 'local' food remain unchanged. Local Food is primarily associated with fruit, vegetables, meat, bakery and dairy.

#6



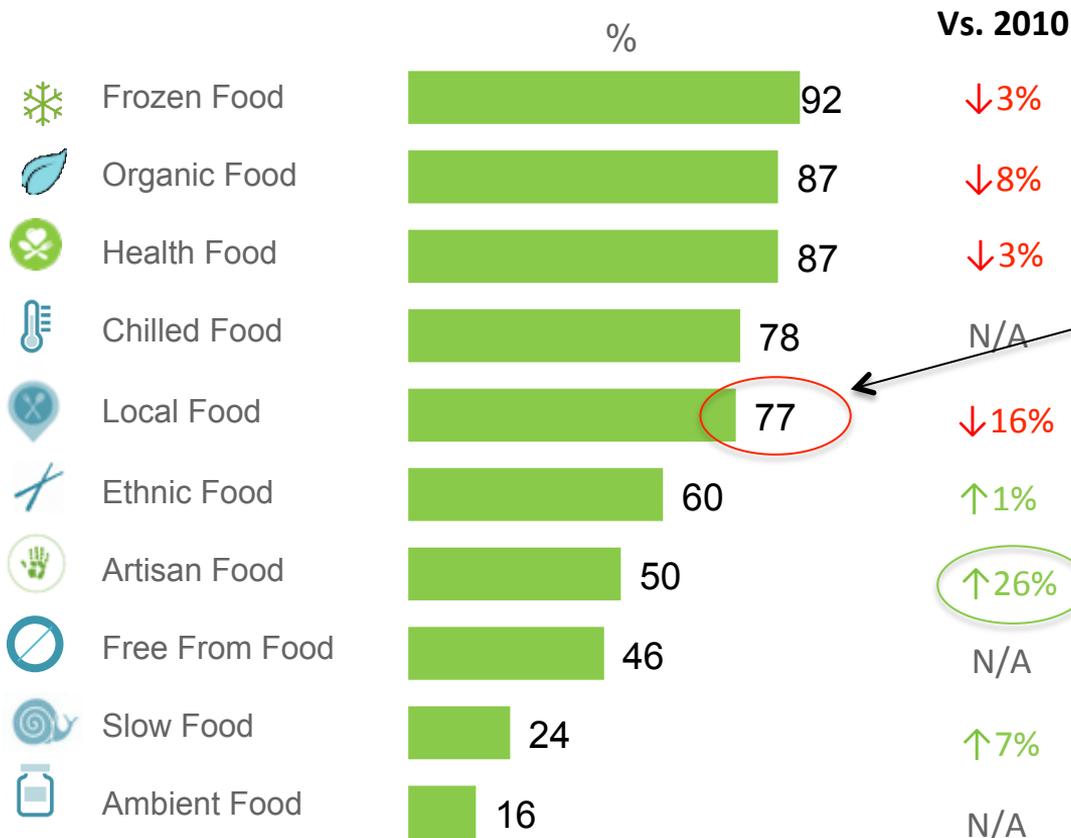
There is a growing association with gifting/ entertaining/ special occasions

A growing association with entertaining, special occasions and gifting for 'local' produce. Particularly relevant to the young professional target consumer.

The Meaning of Local



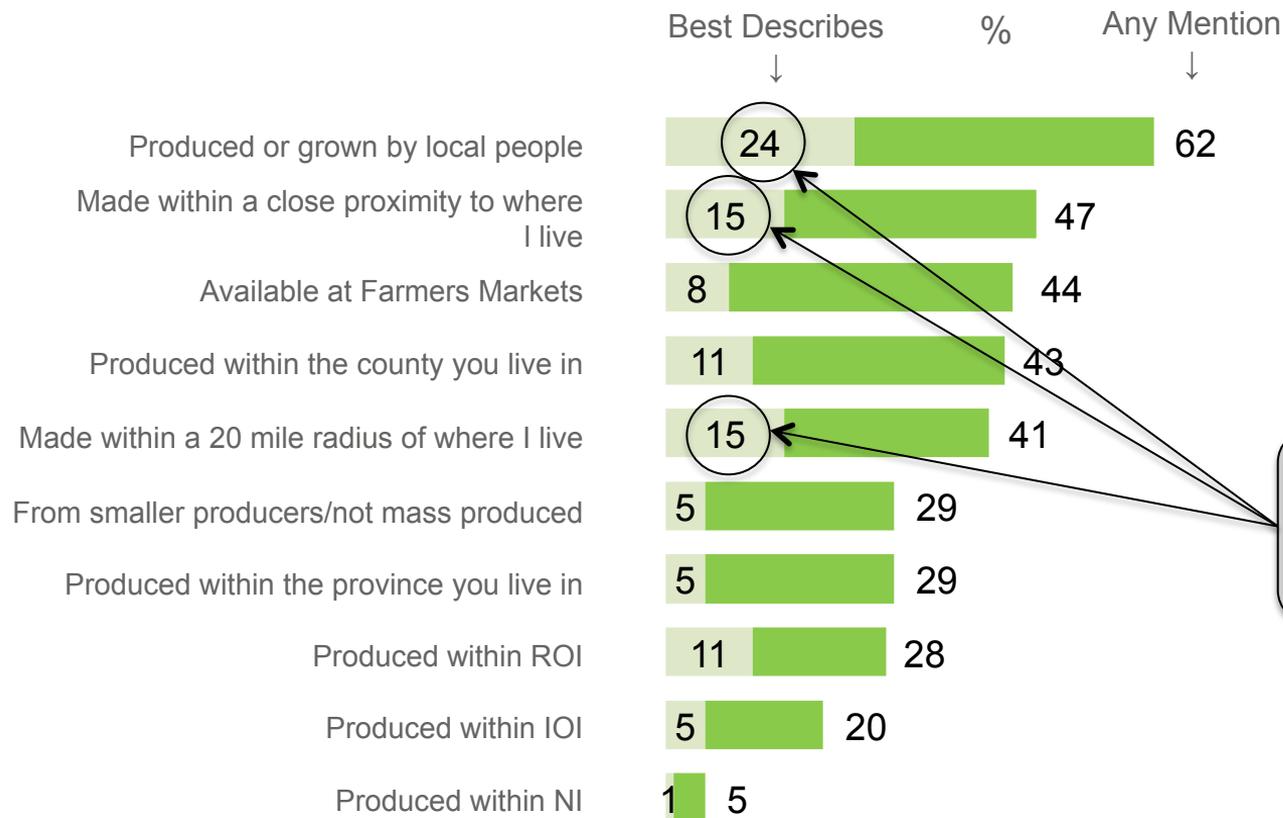
Awareness of different food types



Over 3 in 4 consumers claim to be aware of the term LOCAL FOOD

A significant increase in the awareness of ARTISAN FOOD

The prompted definition of *Local*



The top 3 mentions highlight that *local food* is about the proximity to you

The elements of *Local*

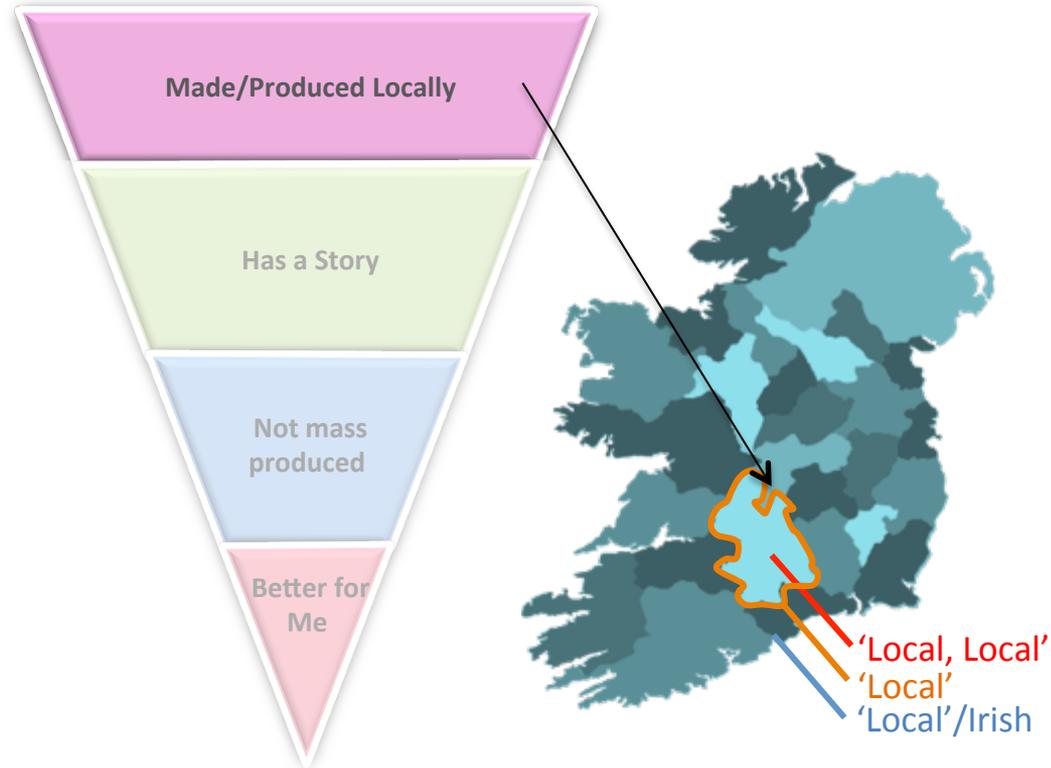


In 2010, there was more focus on the local producer as the “local hero” & knowing the person in your area.

Today, whilst this is still relevant there is more emphasis on the proximity & origin of the product.

This is because local food has travelled & become more widely available outside of it’s home county.

Degrees of *local*



For most 'local' is defined as being products that are grown or produced by local people i.e. within the local community, or ideally from within the county.

However, in instances where certain products e.g. fish are not available locally i.e. within Tipperary; the closest neighbouring county that produces fish is considered 'local' e.g. Waterford.

Interestingly, Young Professionals living and working in Dublin continue to refer to their home towns and counties as 'local'.

Today, there is more emphasis on the proximity & origin of the product.

This is because local food has travelled & become more widely available outside of it's home county.

The blurred lines of *local*



True 'local' = small.

Where the product/brand is from is somewhat irrelevant – it is 'local' to that particular area once it is produced on a small scale.

However; often brands start off 'local' and then become more mainstream, and therefore fall into the 'Irish' category.

Some 'big' name brands continue to be part of the mix depending on locality. Such as Ballymaloe and the Happy Pear are considered 'local' to their area i.e. Cork and Greystones.

Most 'local' people will continue to refer to the brand as a 'local' brand given it is from their area e.g. Bulmers, ballymaloe & clonakilty.

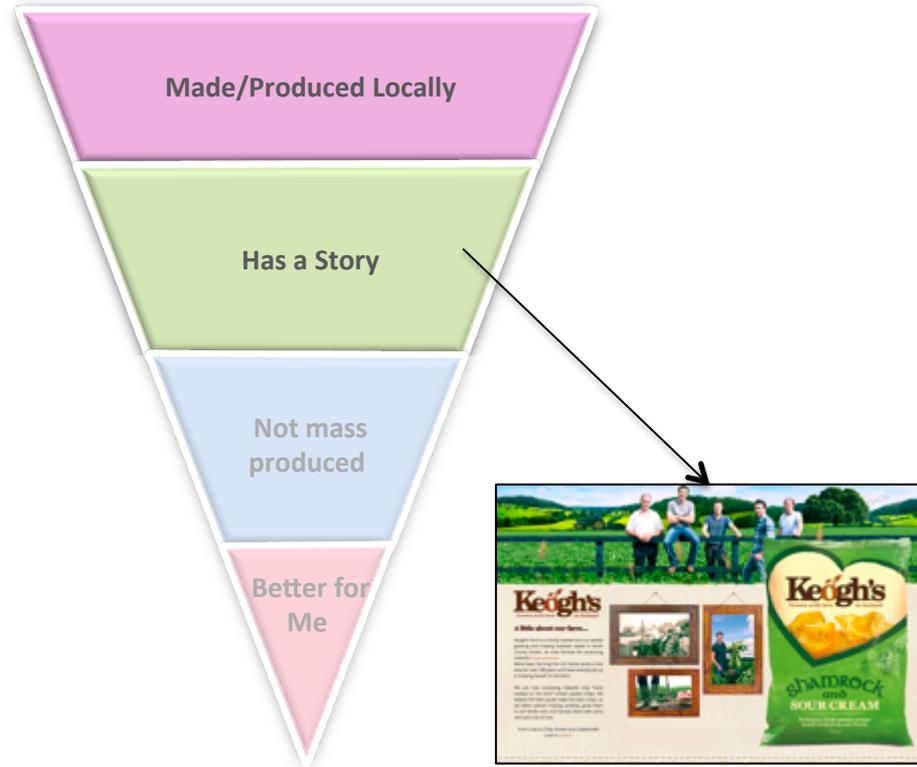
Local foods have a story to tell

Most claimed to associate 'local' with the person i.e. the farmer, the producer.

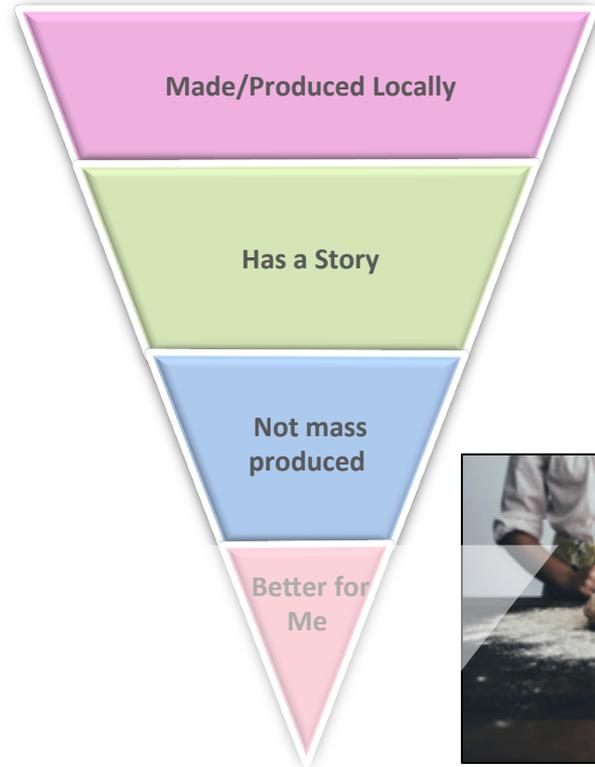
Appreciate knowing about the person, where they are from and how the product was made. It acts as a talking point amongst family and friends when recommending. The person is also a key motivating factor to visiting Farmers Markets.

Widespread preference for the inclusion of a picture of the farmer/producer on pack, along with a brief 'story' behind the product – particularly for 'new' products.

Ultimately, the consumer buys into the whole package – the product and the person.



Small scale/homemade associations



'Local' is primarily associated with small, almost hand-made – not mass produced.

However; this is not always the case e.g. Ballymaloe.

Often brands start out as 'local' (small-scale) and once they become more popular, the lines become somewhat blurred e.g. Rebel Chilli.

True local ('local, local') is purchasing eggs from the local farmer/neighbour – often hand-picked by self.

The elements of *Local*



Made/Produced Locally

Has a Story

Not mass
produced

Better
for Me

It's about communicating your origin as well as the "producer" story. Origin & provenance helps define it as a local product for those consumers in another county

In 2010, there was more focus on the local producer as the "local hero" & knowing the person in your area.

Today, whilst this is still relevant there is more emphasis on the proximity & origin of the product.

This is because local food has travelled & become more widely available outside of it's home county.

Local exists across a spectrum



Markets



Duty Free

The category covers a broad spectrum, from fruit & veg sold in Moore street market to luxury Irish chocolates in duty free. In that instance, Local food producers can be attributed very different and often competing sets of values and motivations from one another.

Local is skewed towards the personal



The Consumer



The Retailer



Some local food producers have traditional food businesses or those passed down through the generations. Others are closer to the personal and professional, those that may have started via lifestyle or in more recent times. Both of these types of businesses fall between the consumer and the retailer.

Local is skewed towards the personal



Yet they are closer in scale, attitudes and values to the consumer, than they are to the multiples. This is because of the passion and people behind the business.

Local is skewed towards the personal



It is important to understand how close you are to your consumer as opposed to being just a product on shelf

Yet they are closer in scale, attitudes and values to the consumer, than they are to the multiples. This is because of the passion and people behind the business.

Attitudes towards *Local Food*



Key Descriptors of *Local Food* by region



SLIGO



DUBLIN



CORK

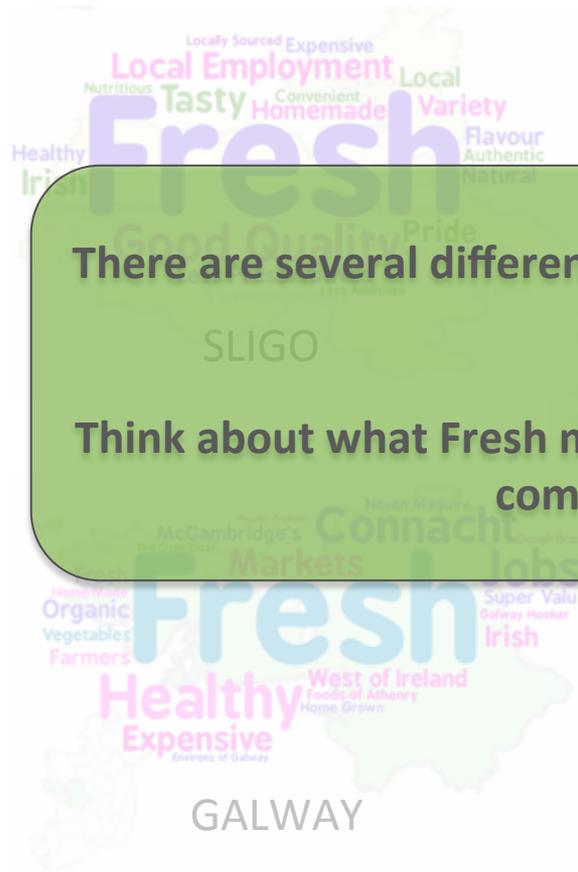


GALWAY



TIPPERARY

Key Descriptors of *Local Food* by region



There are several different meanings for fresh. It is a by-word to communicate many positive benefits.

Think about what Fresh means within your category or for your product. How do you communicate freshness to your consumer?

Key Descriptors of *Local Food* by region



SLIGO



DUBLIN



CORK



GALWAY



TIPPERARY

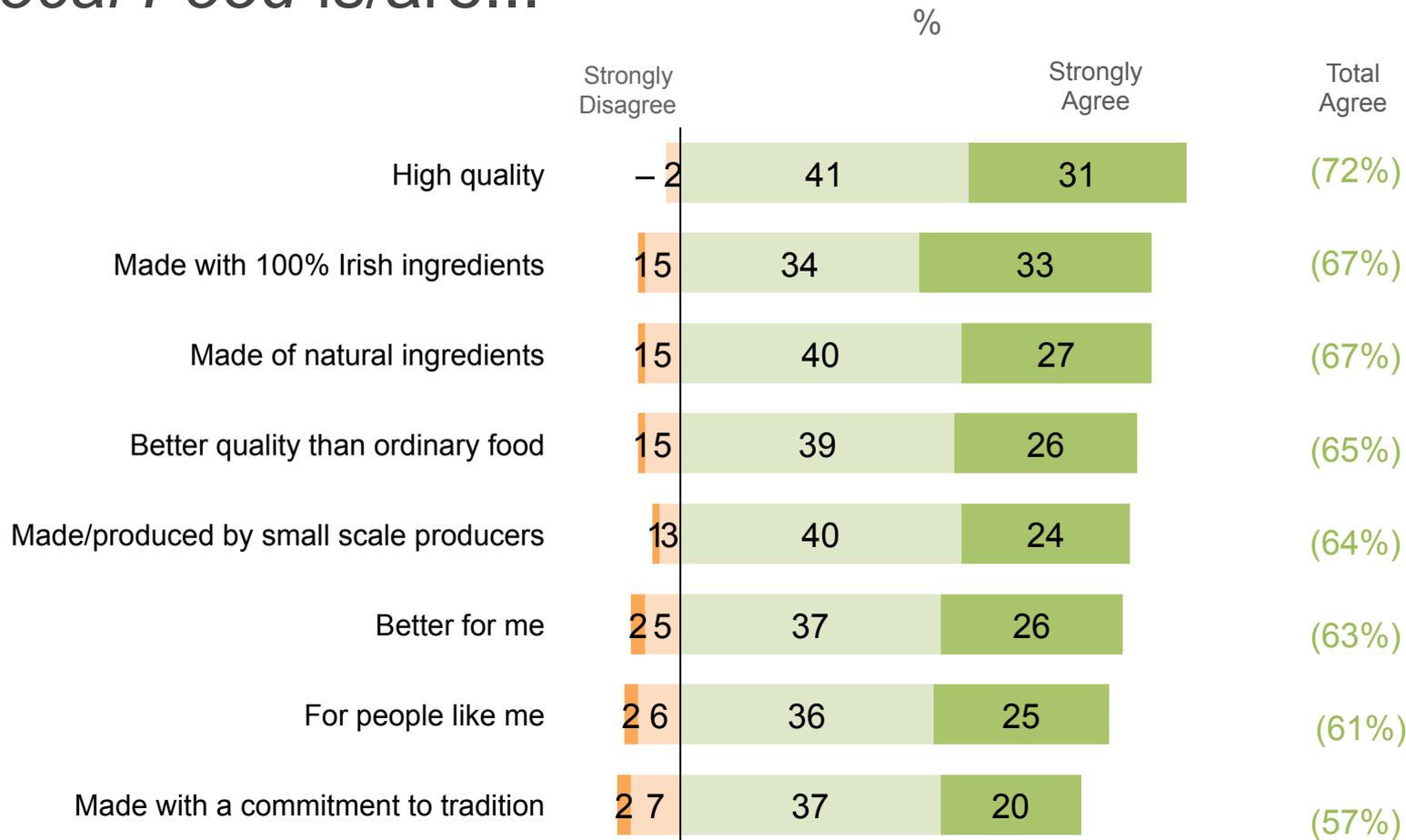
Attitudes towards *Local Food*



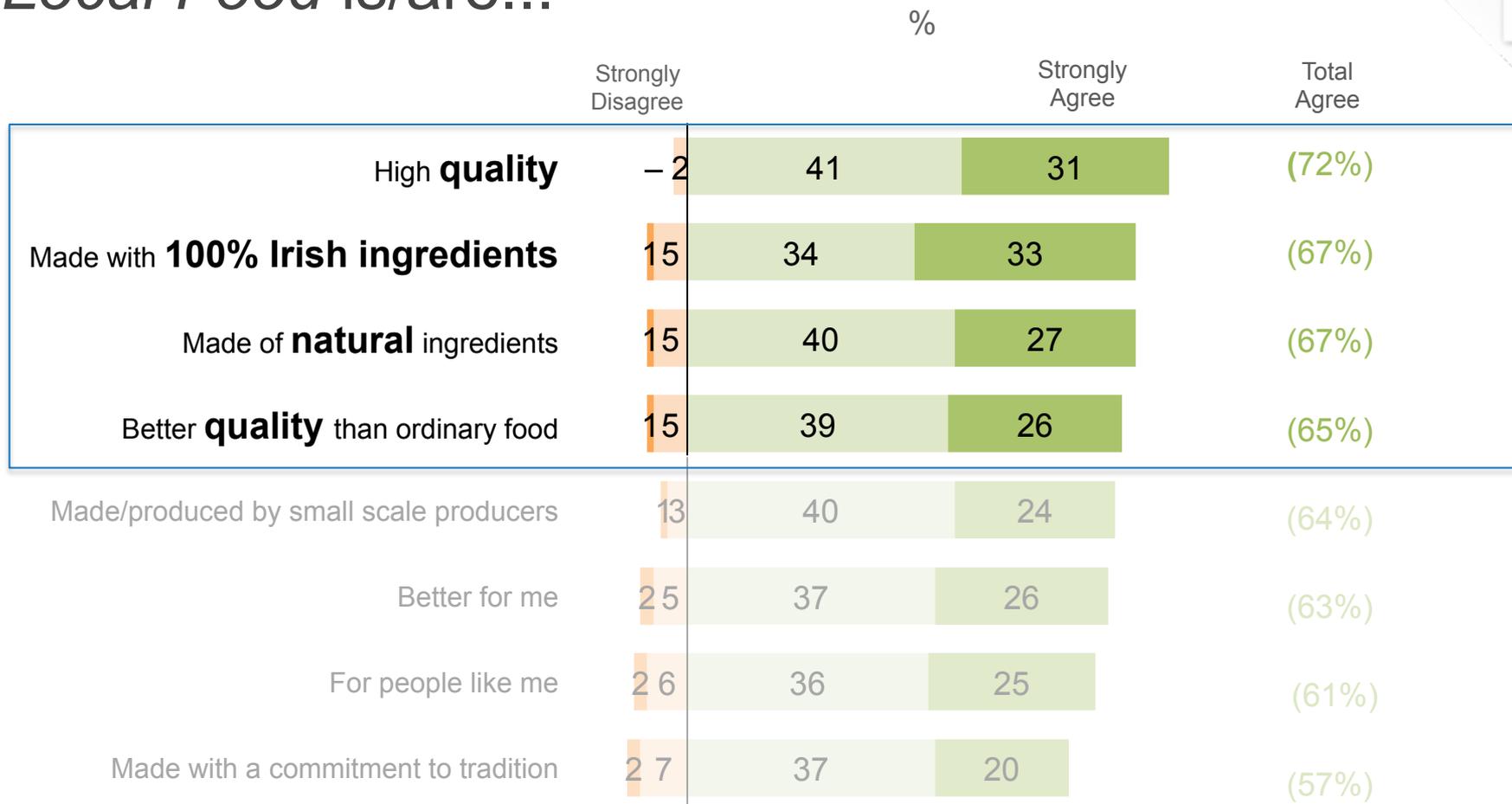
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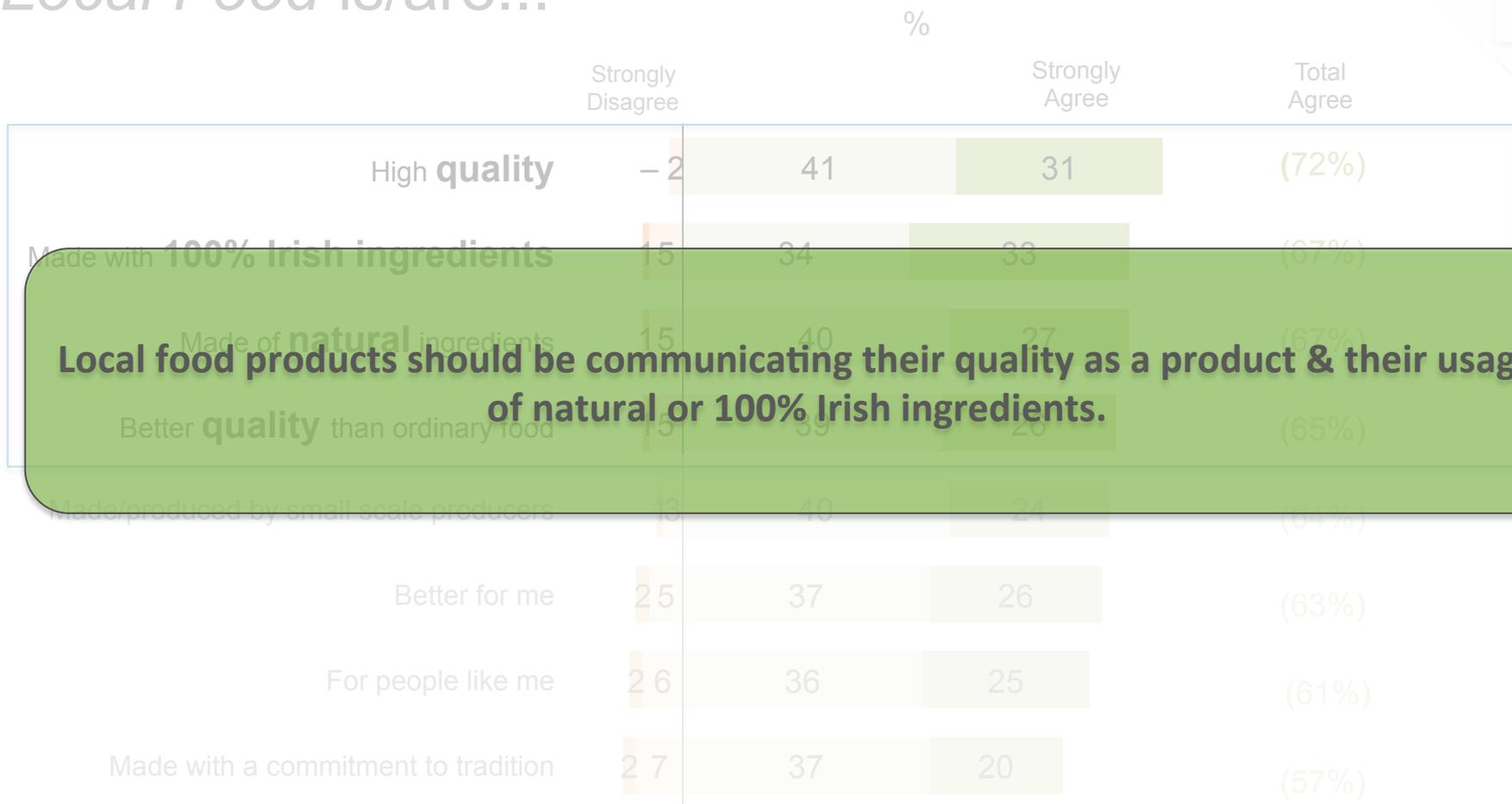
Local Food is/are...



Local Food is/are...

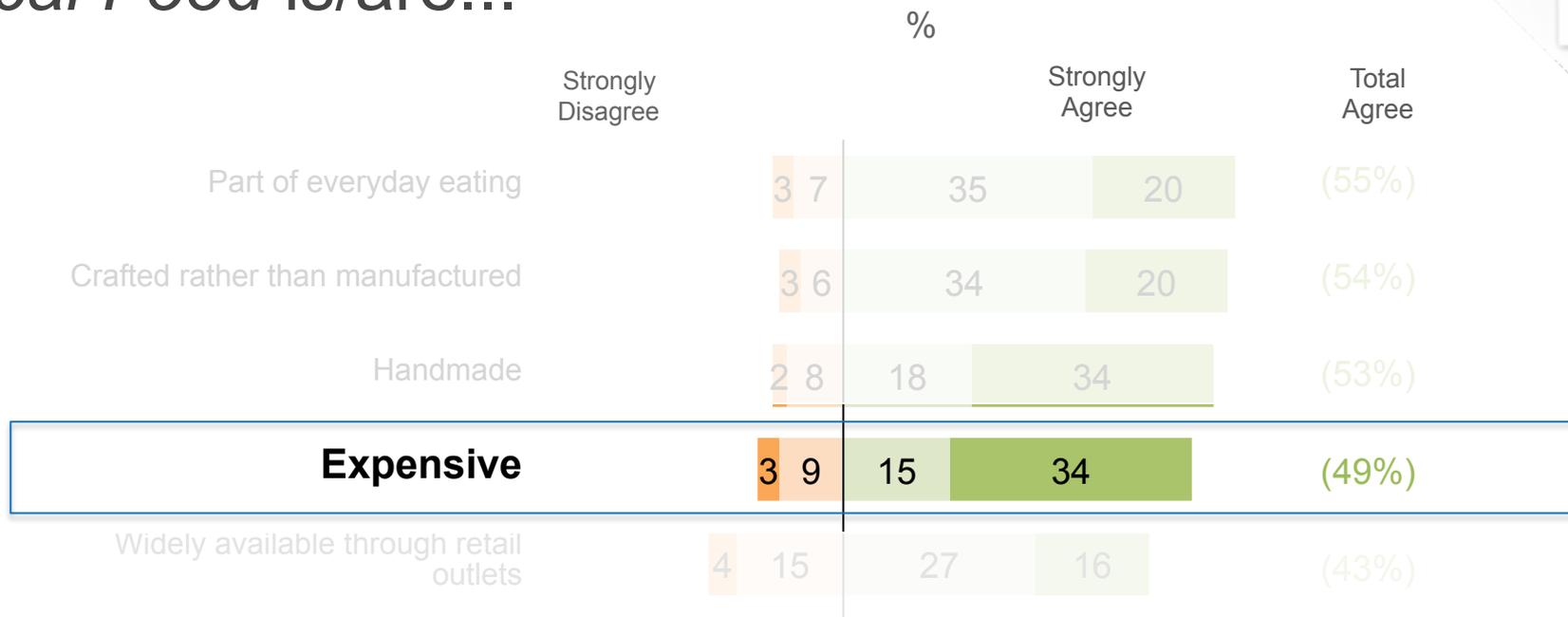


Local Food is/are...



Local food products should be communicating their quality as a product & their usage of natural or 100% Irish ingredients.

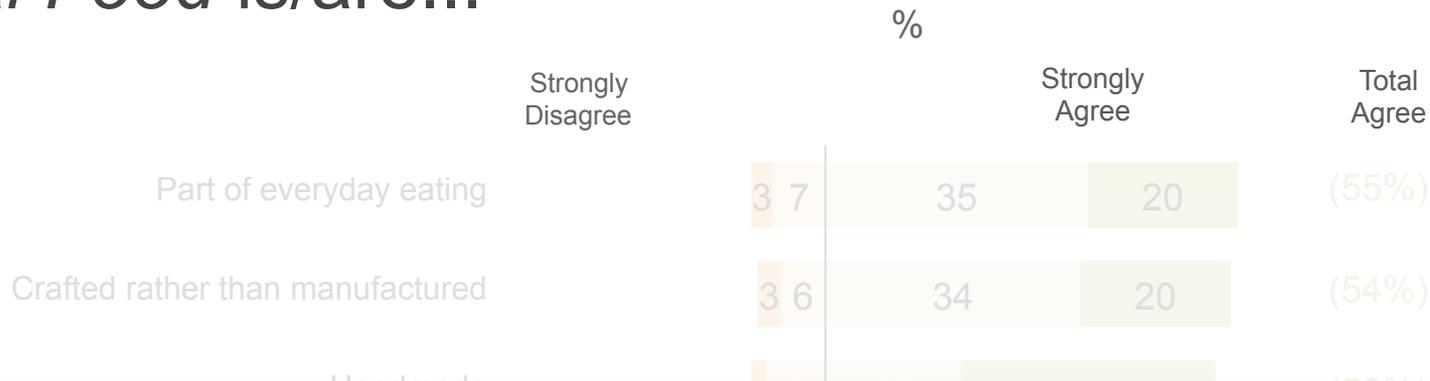
Local Food is/are...



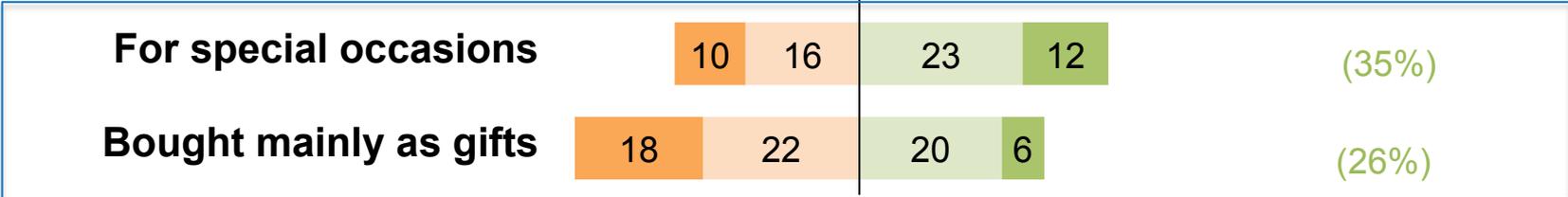
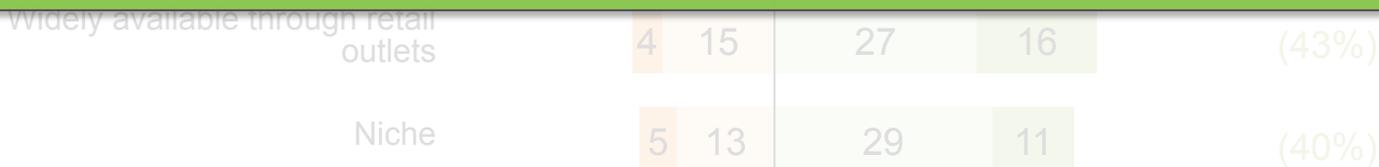
What's interesting here is how far the association with a price premium sits within the rest of the associations. Whilst price is always important, there is an opportunity to leverage the other key associations for local food.



Local Food is/are...



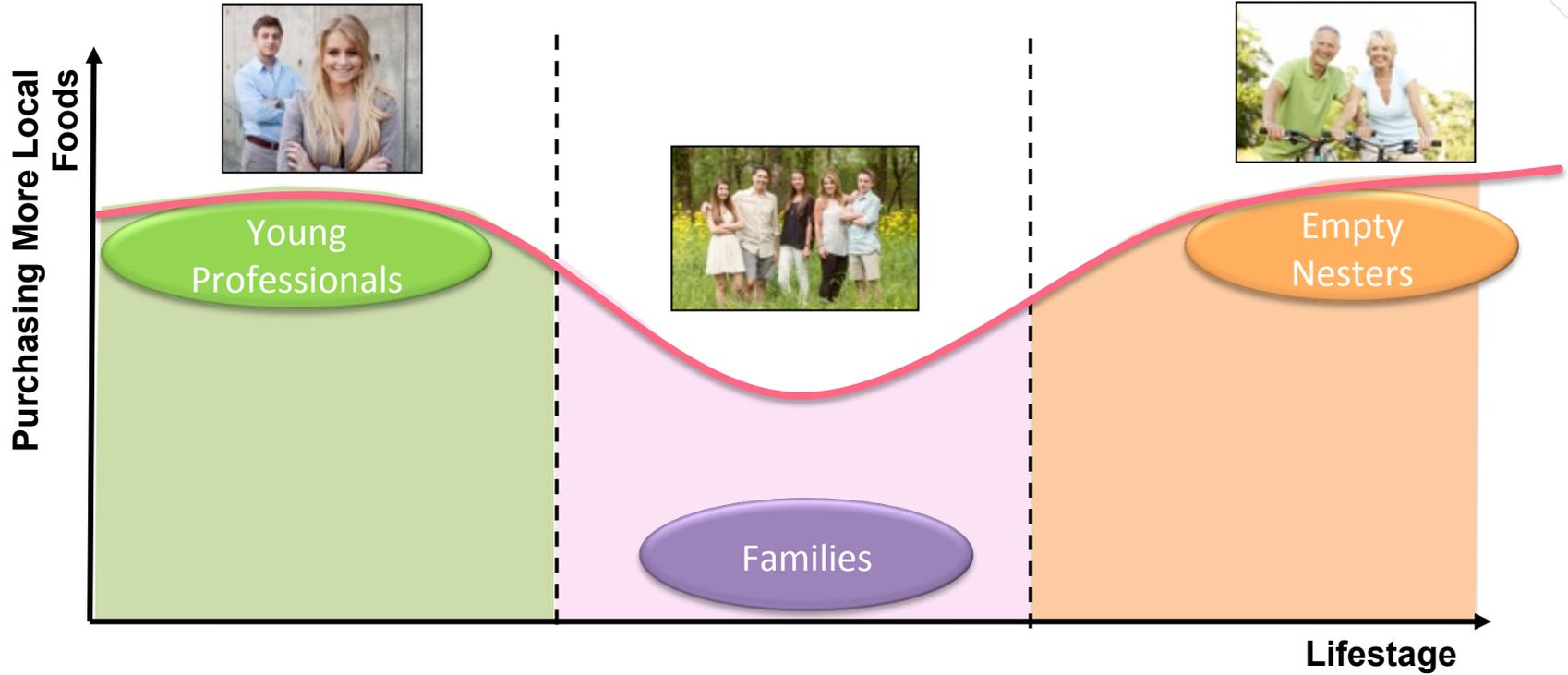
Local Food is least likely to be described as being for special occasions and for being bought primarily as gifts. However, this perception for some is beginning to change. The young professionals and heavy local supporters are more likely to purchase a local food product as a gift or for a special occasion



Local by demographic



Shopper Overview



Those with more disposable income to spend on themselves, purchase more local food than families.

Young Professionals

Lifestage

1. Aged 25-35, no kids.
2. ABC1.
3. All in full-time employment.
4. More disposable income as shopping for self (and partner).



General Shopping Behaviour

- ✓ Conducting smaller shops more regularly.
- ✓ Primarily shop between SuperValu and Aldi.
- ✓ Preference to shop in SuperValu for convenience, range of products, and local connotations.
- ✓ Opt for Aldi due to cost savings, convenience and presence of Irish products.

"I know I should go to Aldi more, I spend more in SuperValu but it's more convenient." Dublin, Young Professional

Young Professionals

Local Food Shopping Behaviour



- ✓ Regular visitors to Farmers Markets.
- ✓ Most Young Professionals in Cork shopping in the English Market on a weekly basis.
 - ✓ Primarily for artisan breads, cheese and meats.
- ✓ Enjoy discovering the latest 'local' products.
- ✓ More conscious of what they are eating in recent times - preference to cook from scratch, using the 'best' ingredients.
- ✓ A niche cohort purchasing directly from farmer/producer for certain products.
 - ✓ Vegetable box, eggs, honey (honesty box).

"Local stuff is more expensive, but it's worth it. When you consider the difference between Brennans bread and O'Keefes, your health will benefit if you buy the latter."
Cork, Young Professional

Families

Lifestage

1. Aged 36-49.
2. ABC1/C2
3. A mix of mums with younger and older kids.
 - All with 2+ kids.
 - Ranging from 6-24 years.
4. Most in full-time employment.
5. Less disposable income given have a family to feed.



General Shopping Behaviour

- ✓ Visiting supermarkets more regularly for smaller shops of fresh produce.
- ✓ Primarily shopping between Dunnes, Aldi, and Lidl.
 - ✓ Dunnes for 'branded' products (NB cereal), and due to €10 voucher for every €50 spent.
 - ✓ Opt for Aldi/Lidl due to cost and convenience.

Families



Local Food Shopping Behaviour

- ✓ Occasional visitors to Farmers Markets.
- ✓ Tend to purchase 'local' Products more when entertaining, for special occasions (e.g. Christmas) & for gifting.
- ✓ Most claimed preference to purchase more 'local' products; however, difficult to justify the extra spend.
 - ✓ More likely to purchase 'local' products if recommended by family/friends, or if on promotion.

*"There are the odd few bits that I would pay more for but I can't justify buying local food all the time."
Sligo, Families*

*"Certain times of the year I'd be willing to spend more on local produce, e.g. Christmas."
Sligo, Families*

Empty Nesters

Lifestage

1. Aged 50+.
2. C1C2.
3. Most retired, some with grandkids.
4. More disposable income given (most) kids have moved out.
 - Shopping for self/partner.



General Shopping Behaviour

- ✓ Shopping across a range of stores, including; Dunnes, Aldi, Tesco, SuperValu and Lidl.
- ✓ Choosing stores primarily due to convenience; albeit heavily influenced by offers/promotions (NB weekly leaflets).
- ✓ Dunnes a key store of choice in Tipperary as a result of children working there.

“My main shop is done in Tesco and then I go to the Saturday morning markets for all my fresh produce.” Galway, Empty Nesters

Empty Nesters

Local Food Shopping Behaviour



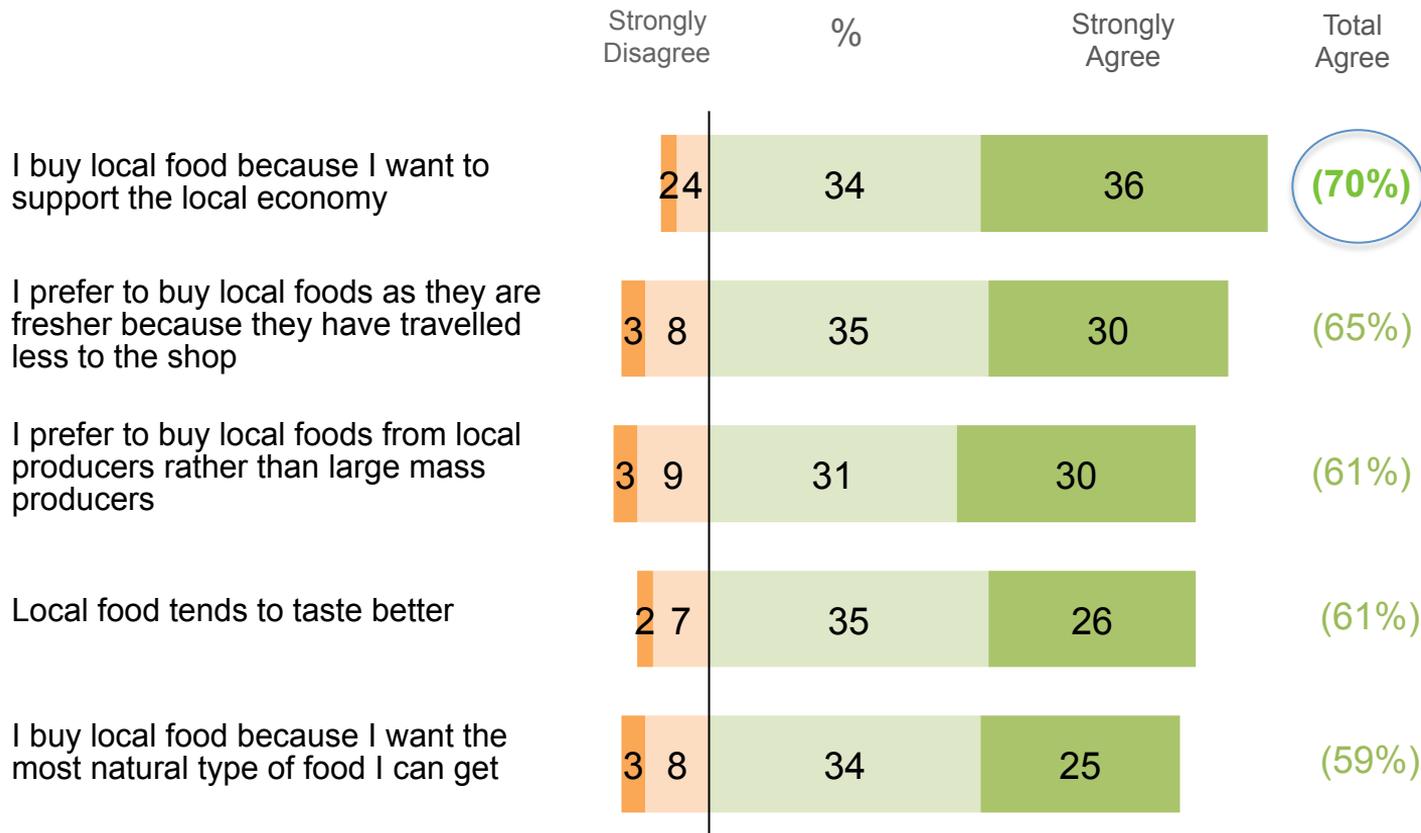
- ✓ Most claim to purchase most of their meat from the Local Butchers - NB: James Whelan in Tipperary.
- ✓ The Local Fishmonger, Greengrocer & Bakery also popular amongst Empty Nesters
- ✓ Regular visitors to Farmers Markets.
 - ✓ The Galway Food Fair popular at Easter.
- ✓ Purchasing eggs direct from local producers more prevalent within Tipperary (honesty boxes).
- ✓ A niche cohort growing own vegetables in Galway.

*"I would do my shopping in Aldi and Dunnes and then Whelans for my meat and then the Farmers Market."
Tipperary, Empty Nesters*

Purchasing Behaviour

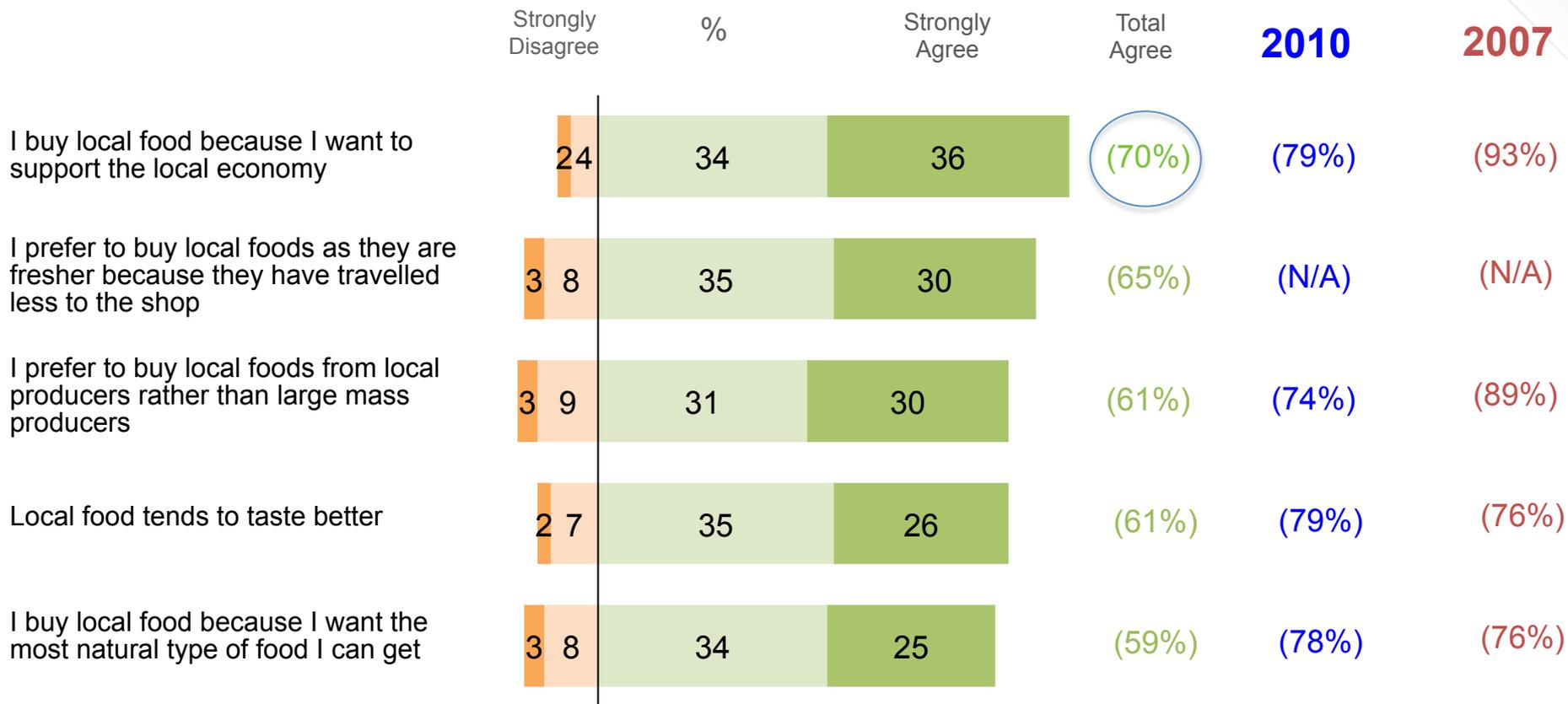


Attitudes towards purchasing *local*

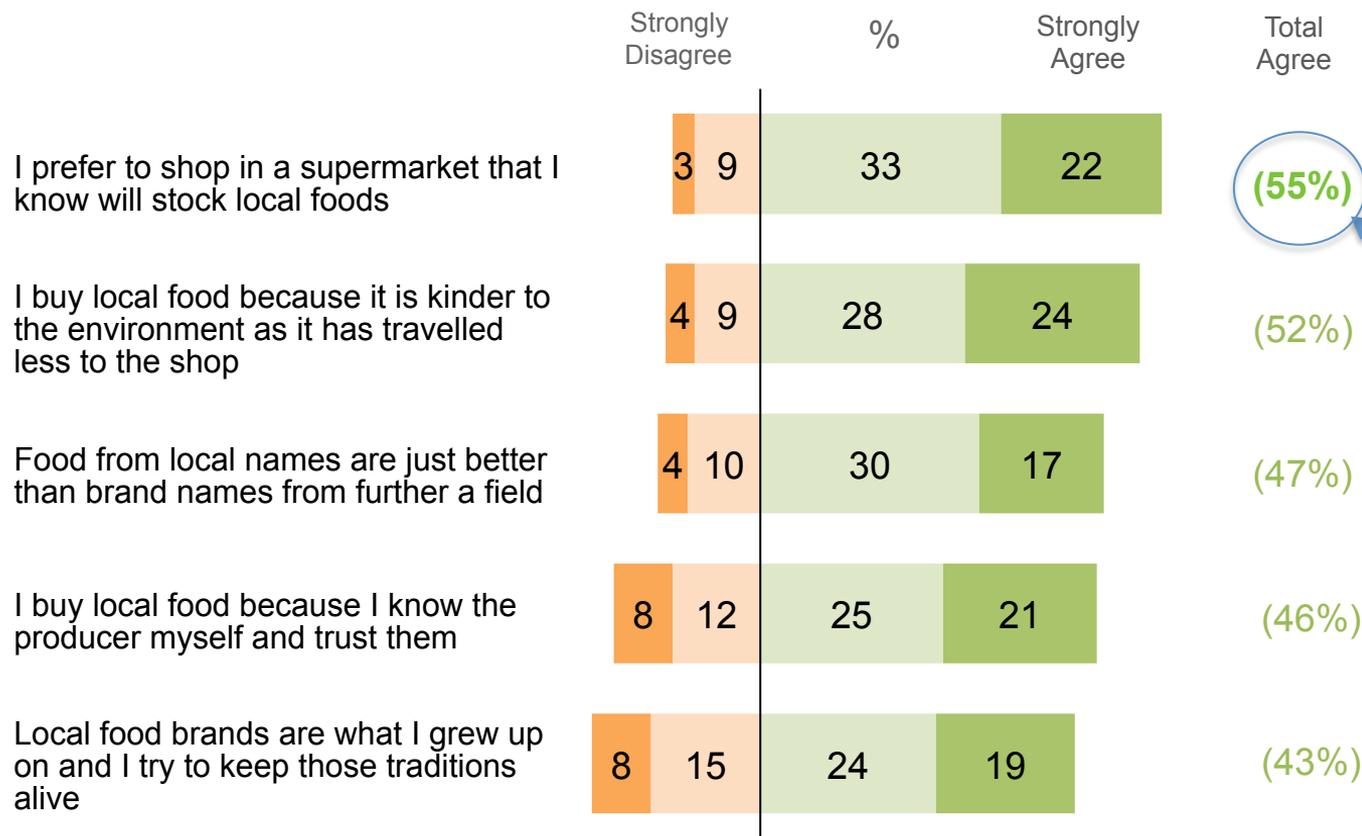


7 in 10 claim to purchase *local food* to support the economy

Attitudes towards purchasing *local*

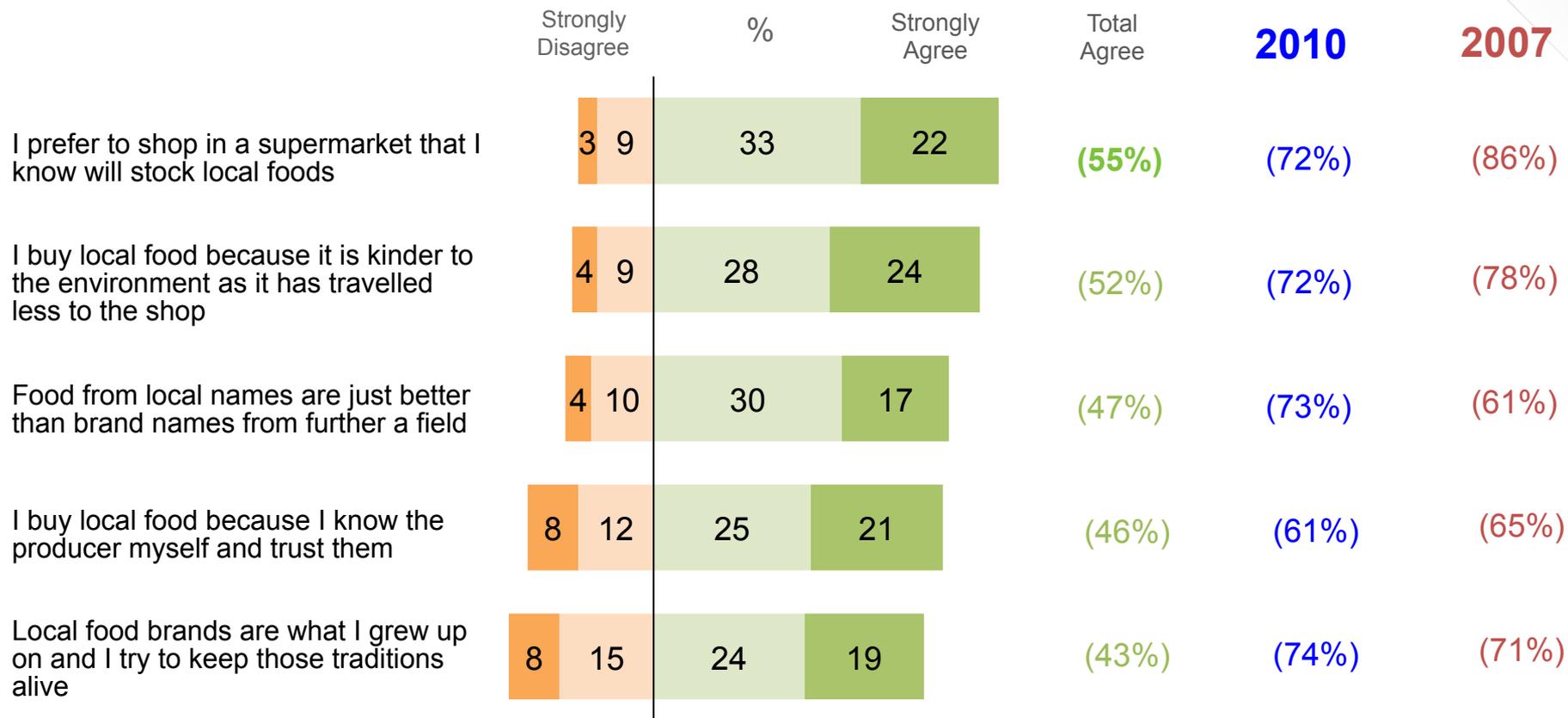


Attitudes towards purchasing *local*



Half of consumers claim to shop in supermarkets that they know will stock local

Attitudes towards purchasing *local*



Attitudes towards purchasing local

Whilst it appears that attitudes towards purchasing local are waning, we can explain this as a result of retailer impact and increased availability.

Local food has become more mainstream & has become somewhat of a routine purchase. This is a positive for local food as it has become more accessible.

I buy local food because it is kinder to the environment as it has travelled less to the shop



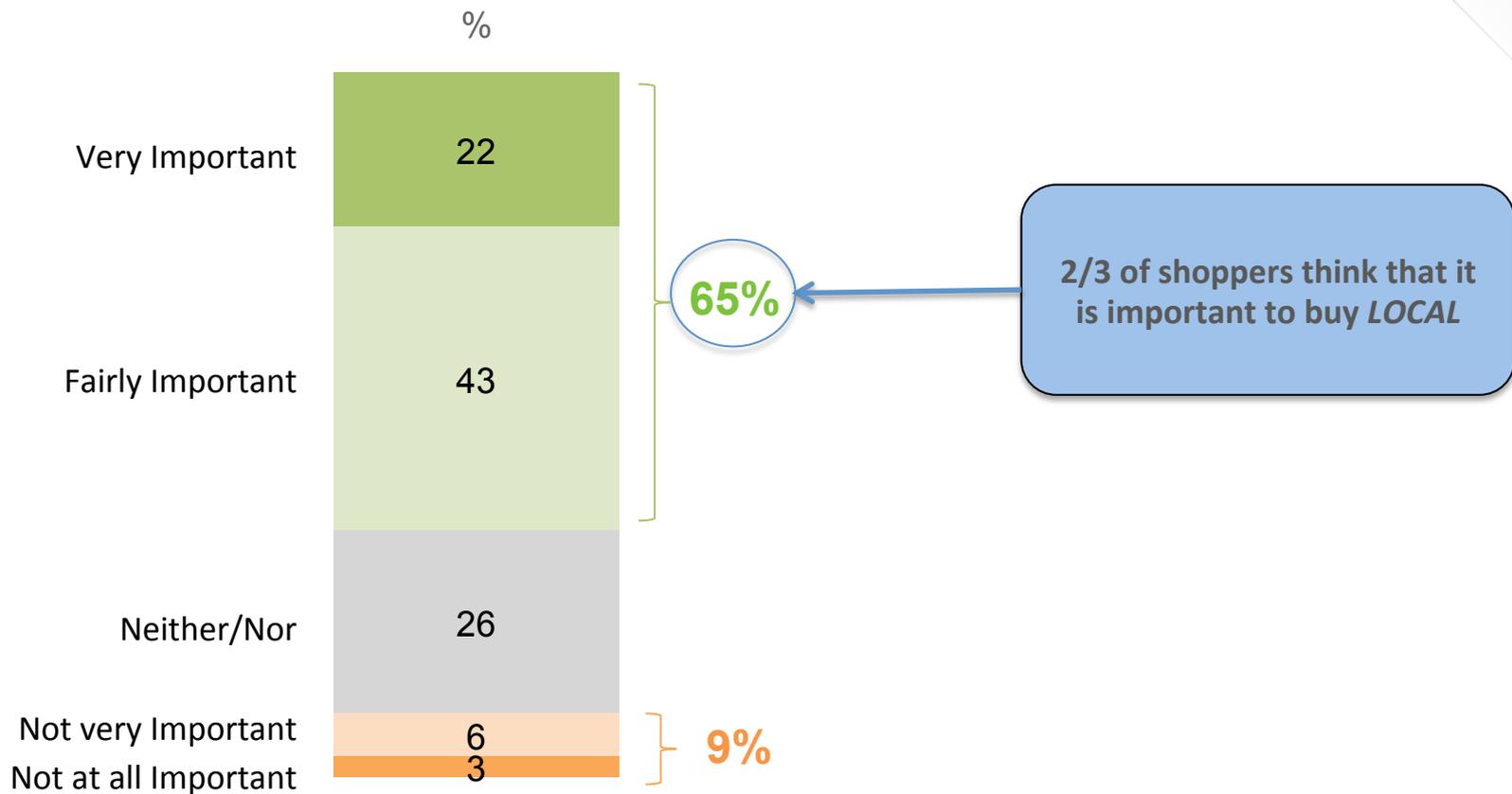
In this instance, we can start understanding how we should communicate the rational elements of our product i.e. the product benefits

We are now competing with the mainstream brands on a product level.

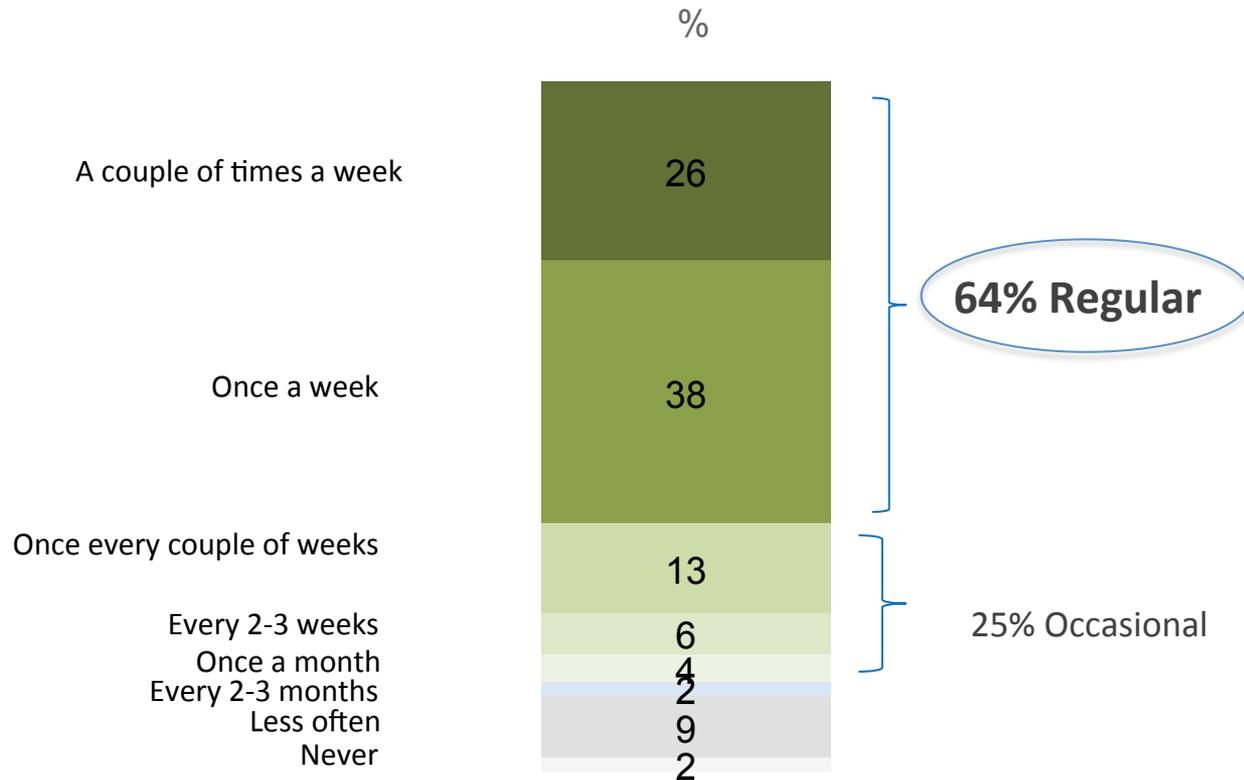
Local food brands are what I grew up on and I try to keep those traditions alive



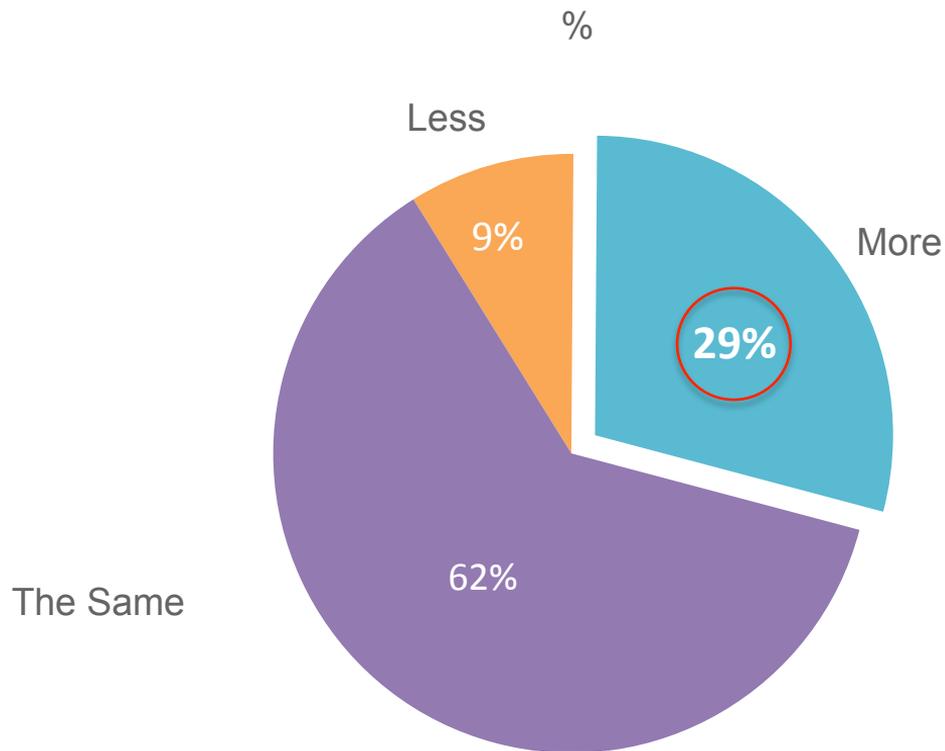
Importance of purchasing *local*



Frequency of purchasing *local*



Change in purchasing behaviour over 12 months



"I go the markets a lot more than before. You're supporting local and there's good quality. As I get older I care more about that sort of stuff, you appreciate it more."
Cork, Young Professional

Triggers to purchasing *local*



The primary reason for purchasing ‘local’ food is to support local producers/farmers/communities.

Supporting the community was the primary reason cited for purchasing ‘local food’.

- ✓ Supporting local farmers/ producers.
- ✓ Creating/supporting local jobs.

A real feel-good factor associated with supporting local – giving something back to the community.

A sense of pride in ‘supporting your own’.

“It’s good to buy local. It’s nice to think the money will be going somewhere in Cork as opposed to Coca Cola.”

-Cork, Young Professional

“Keep money in the economy.”
-Tipperary, Empty Nesters

Triggers to purchasing *local*



- ✓ Who the producer/farmer is?
- ✓ What the product is?
- ✓ Where (and how) the product is made?
- ✓ When the product was first made?
- ✓ Why the consumer should purchase (USP)?

Widespread appetite to know the story behind the product/brand. The 5 W's.

All want to know about/follow a product/brand through a success story:

- A sense of delight in knowing about a brand/product before it becomes successful (well-known).
- The success often shared within the local community.

"I think the local ones have nicer packages too. They have a story attached."
-Cork, Young Professional

"Local is all about the personal touch."
-Sligo, Families

Triggers to purchasing *local*



*Superior Quality
Health Benefits
Freshness
Better Taste*

Most acknowledge the shorter shelf life of 'local' foods – aids the perception that it is better as a result. Less processed, more natural, fresh.

Often the uniqueness and imperfections associated with 'local' food heightens this perception.

*"Food that's produced locally is not going to have all the preservatives and rubbish added to it because it's sold in the local area and you get it fresher."
- Galway, Empty Nesters*

Triggers to purchasing *local*



Many of the opinion that 'local' food is now more readily available in local supermarkets. Driven by the range available within SuperValu.

No longer have to wait until the weekend to purchase 'local' food at Farmers Markets.

The ability to purchase direct from the producer/farmer more widely available outside Dublin e.g. eggs, fruit and vegetables and honey.

*"SuperValu are one of the better ones for supporting local."
Galway, Empty Nesters*

*"I find the English Market fantastic."
Cork, Young Professional*

Triggers to purchasing *local*



Preference to support ‘the small guy’ rather than big brands – purchasing something handmade rather than mass produced. Resulting in some imperfections.

A niche cohort of Young Professionals and Families referred to it being somewhat fashionable to be familiar with the ‘new’ local brand/product.

*“Cosgrove’s in Sligo and Kate’s Kitchen are two places that do lovely homemade jams.”
Sligo, Families*

Triggers to purchasing *local*



5. Not Mass
Produced

In 2010, one of the triggers to local food was to find a bargain or cut out the middle man. Farmers markets were used to get a bit extra or a bit of a discount.

Today, they are visited to find new products or to meet the producer and it is about supporting them instead of using them to try and save money.

*"Cosgrove's in Sligo and
Kate's Kitchen are two
places that do lovely
business with us"
Sligo, Families*

2. The Story

1. Supporting Local

Barriers to purchasing *local*



1. Cost

Unanimous agreement that most 'local' foods are more expensive than 'ordinary' food.

2. Availability

Young Professionals and Empty Nesters more likely to justify this spend. Value for money evident through benefits to self, including health, quality and freshness.

3. Not for Everyday

Not likely to conduct a full shop of 'local' food products as a result.

4. Lack of Awareness

*"Local food is too expensive to buy for every day."
Sligo, Families*

*"Price would sometimes hold me back but it's worth it for the quality."
Sligo, Families*

Barriers to purchasing *local*



1. Cost

For some, the perception that 'local' food products are not readily available exists. Not familiar with the range available in supermarkets NB. Dunnes Stores.

2. Availability

Assume most products can only be purchased at Farmers Markets.

**3. Not for
Everyday**

Some critical of the decline in produce available to purchase for take-home at Farmers Markets in Dublin.

**4. Lack of
Awareness**

"The Farmers Markets aren't like they used to be. Before you used to come home with a couple of bits now it's just more like a take-away."

Dublin, Young Professional

"The sellers tell you where to go when you're at farmers markets. They'll tell you that they sell in supermarkets."

Cork, Young Professional

Barriers to purchasing *local*



1. Cost

Many 'local' products referred to as luxury items i.e. only for treating/ special occasions. Not likely to purchase for every day.

2. Availability

Widely associated with gifting and entertaining.

**3. Not for
Everyday**

"Is a treat to spend money on artisan foods."
Cork, Young Professional

**4. Lack of
Awareness**

"I'd associate local with hampers/gifting. I think a story behind products or brands makes it a better gift."
Dublin, Young Professional

Barriers to purchasing *local*



1. Cost

2. Availability

**3. Not for
Everyday**

**4. Lack of
Awareness**

Lack of awareness of the 'local' foods available to purchase, and channels available to purchase from acts as a barrier to increased purchase within the category.

"Bigger supermarkets really need to stock more local produce and give them a chance." Sligo, Families

Barriers to purchasing *local*

1. Cost

In 2010, lack of trust was a barrier to purchasing local food. This was a result of the lack of trust in the big brands, particularly those pretending to be Irish.

2. Availability

Today, as a result of the transparency & authenticity of local producers, this scepticism has been alleviated & the barrier has been broken down.

"Bigger supermarkets really need to stock more local produce and give them a chance." Shigo, Families

3. Not for Everyday

4. Lack of Awareness

Influencing Purchasing

Flavors

- Passion Fruit
- Black Sesame
- Key Lime
- Chocolate
- Strawberry Marshmallow
- Vanilla Bean



Factors that can influence a purchase decision



Factors that can influence a purchase decision



Factors that can influence a purchase decision



%

I always know before I go shopping

22

By looking at the display to see products/brands available

16

Your story is just as important as what promotions are on offer. This means that it is critical in getting it right according to your target consumer

By comparing the prices of different products/brands

16

The product/brand I believe will taste the best

15

By comparing the available promotions offered

13

Based on the info. about the producer or where the product has come from

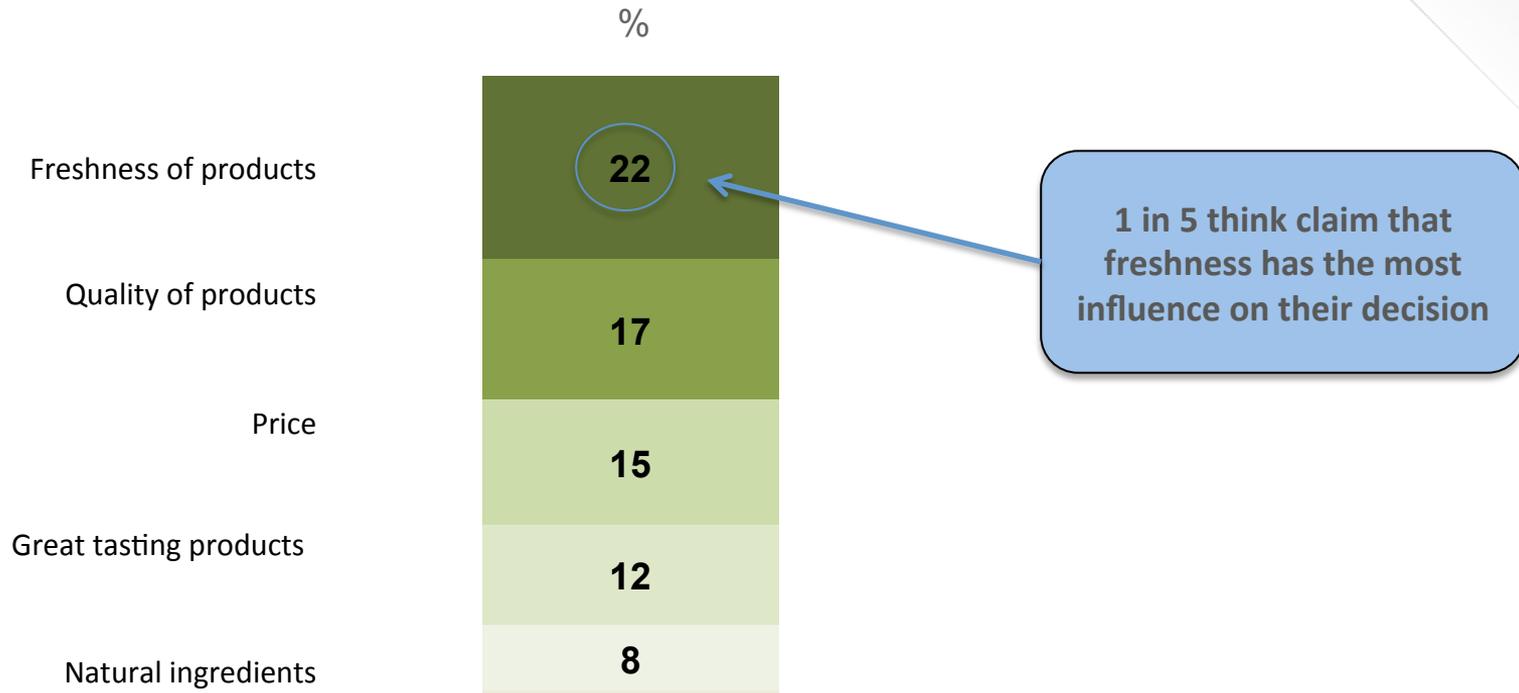
13

Based on the packaging that stands out the most

5

Promotions & Story carry the same importance in influencing purchase decision

Top 5 factors that can influence a purchase decision



Think about what “fresh” means for your brand or product. Is it the ingredients, the distance travelled, the location of production?

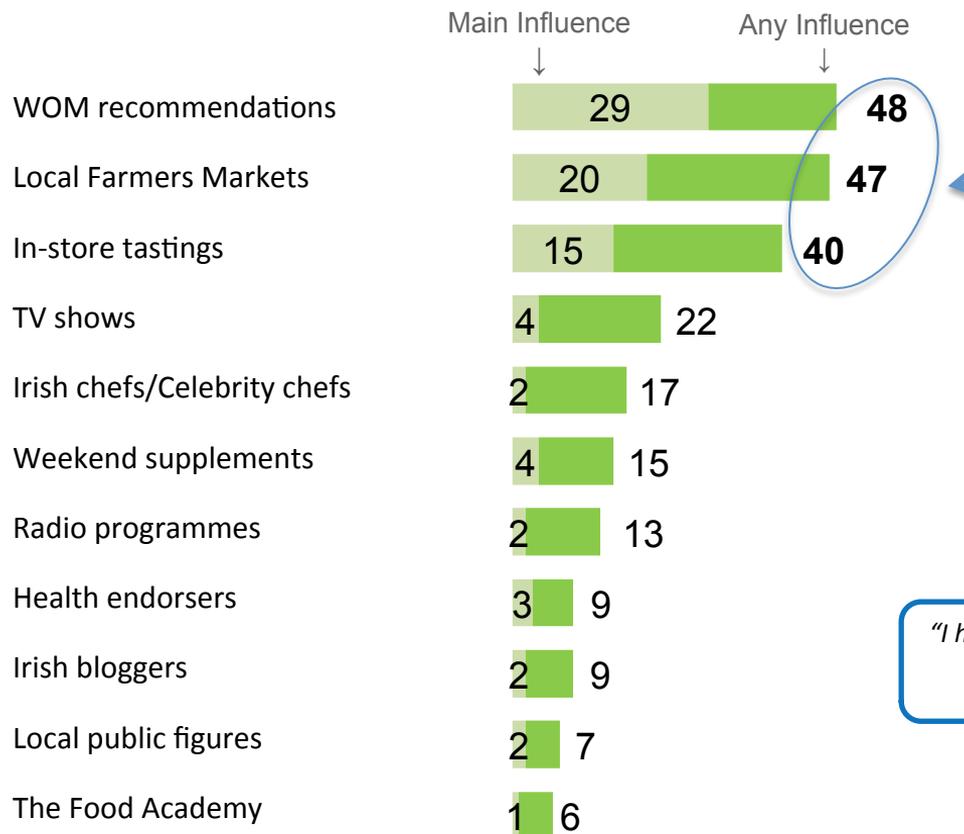
Encouraging to purchase more *local food*



Almost 2 in 3 consumers want greater availability of local food

Consumers are still hungry for more accessibility to local food. This highlights the evolution of local food purchases to a more mainstream or day to day consideration

Key channels to influence



Recommendations & an on the ground presence will help to influence

*"I hear about new products and brands at the markets I go to, everyone there has great food knowledge."
Galway, Empty Nesters*



**1. WOM
Recommendations**



2. Farmers Markets



6. Local Adverts



3. In-Store Tastings

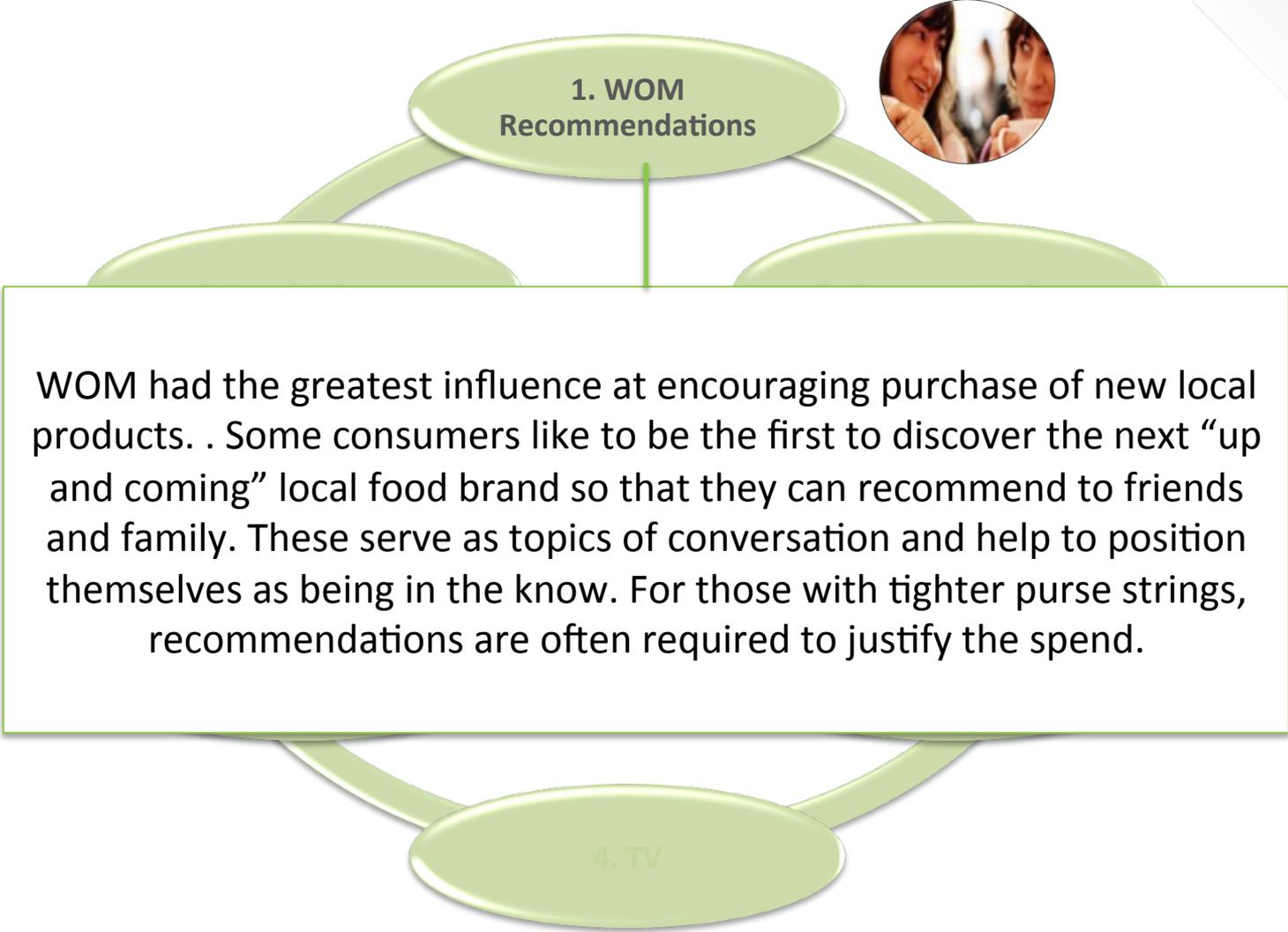


5. Social Media



4. TV





1. WOM Recommendations

WOM had the greatest influence at encouraging purchase of new local products. . Some consumers like to be the first to discover the next “up and coming” local food brand so that they can recommend to friends and family. These serve as topics of conversation and help to position themselves as being in the know. For those with tighter purse strings, recommendations are often required to justify the spend.

4. TV



In-store tastings are the next best thing to Farmers Markets. Supervalu are praised for their frequent in store tastings and opportunities to meet the producer. Free sampling helps to justify the spend.

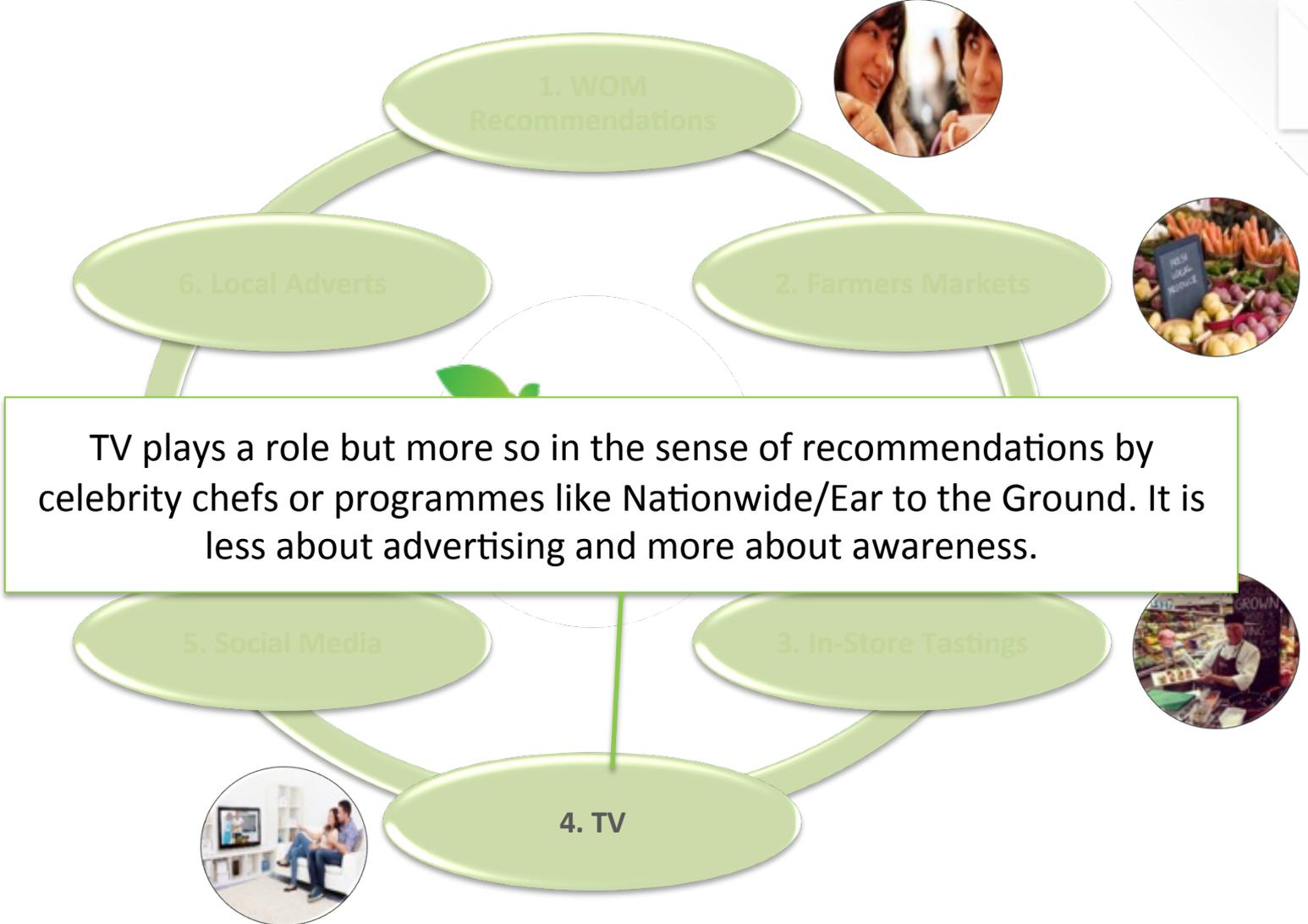
Even the big brands do this, giving out free samples at dart stations or on the high street.

5. Social Media

3. In-Store Tastings

4. TV







1. WOM Recommendations



2. Farmers Markets



6. Local Adverts

Social media can help influence new purchases by sharing content within your community. This is particularly relevant for young professionals.

3. In-Store Tastings



4. TV



5. Social Media



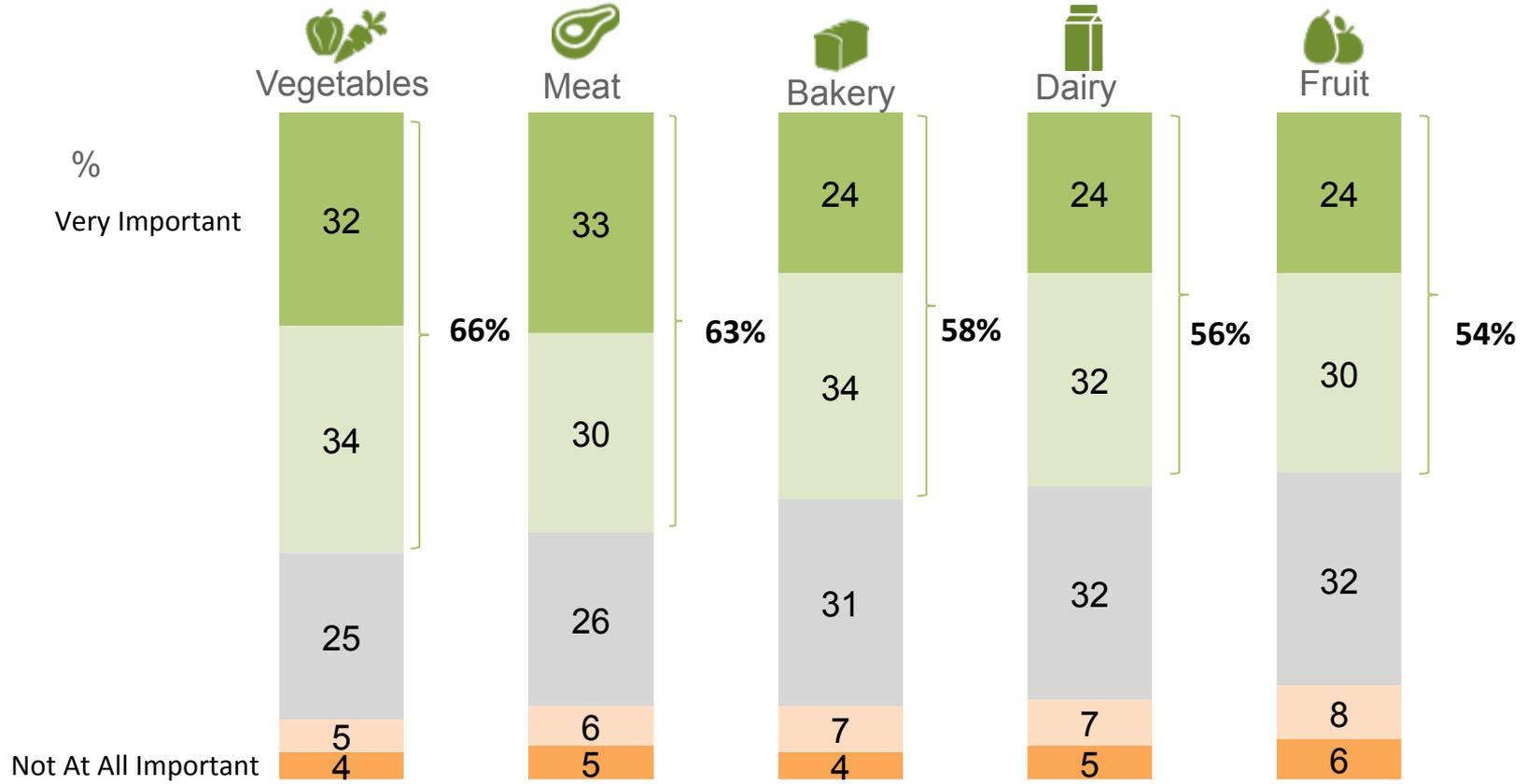


Finally, local adverts (thinking about your local, local) can help to encourage new purchases. Flyers and adverts in local papers for your immediate locality.

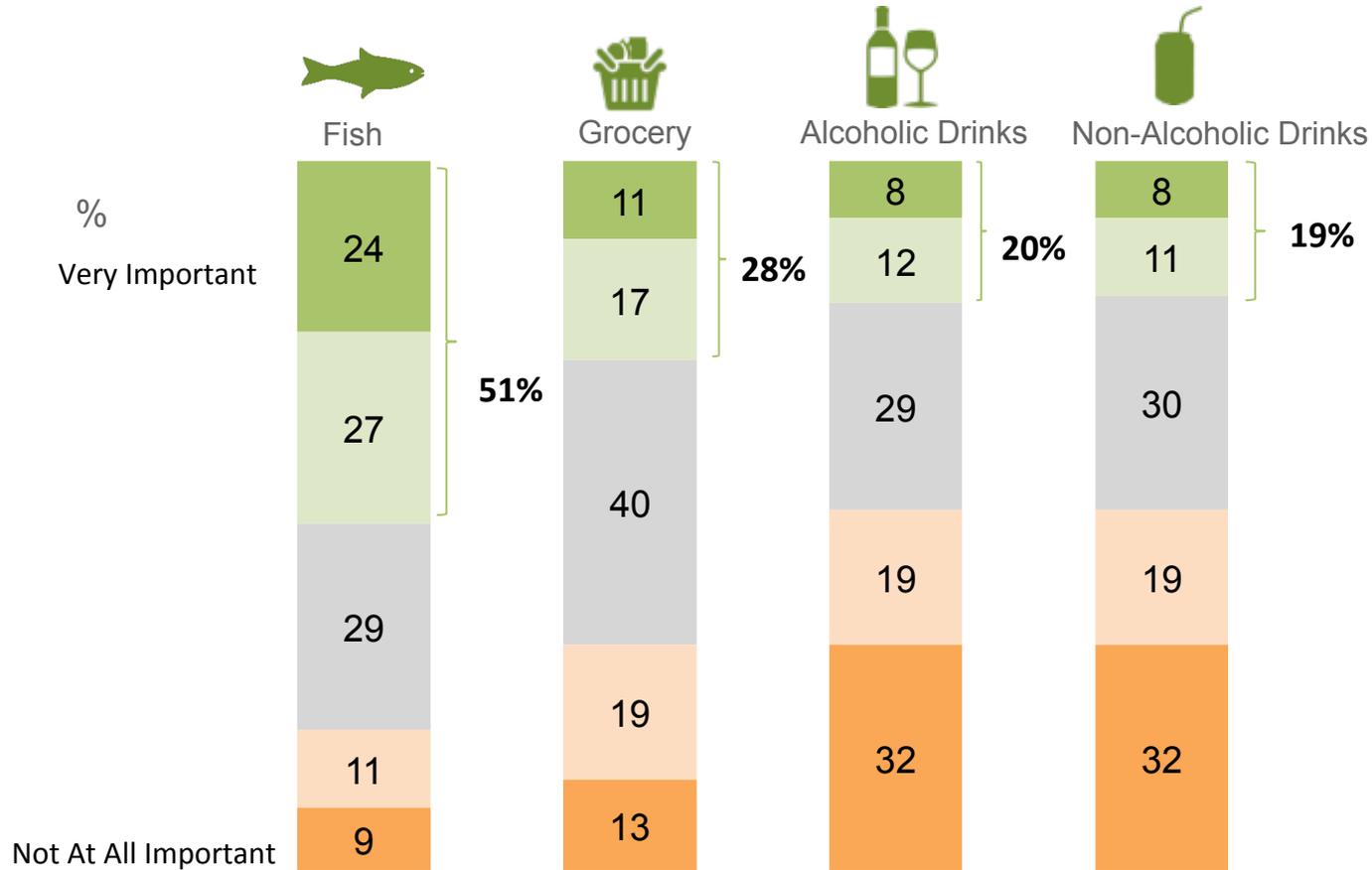
Categories of *Local Food*



Importance of purchasing *Local Food* by category

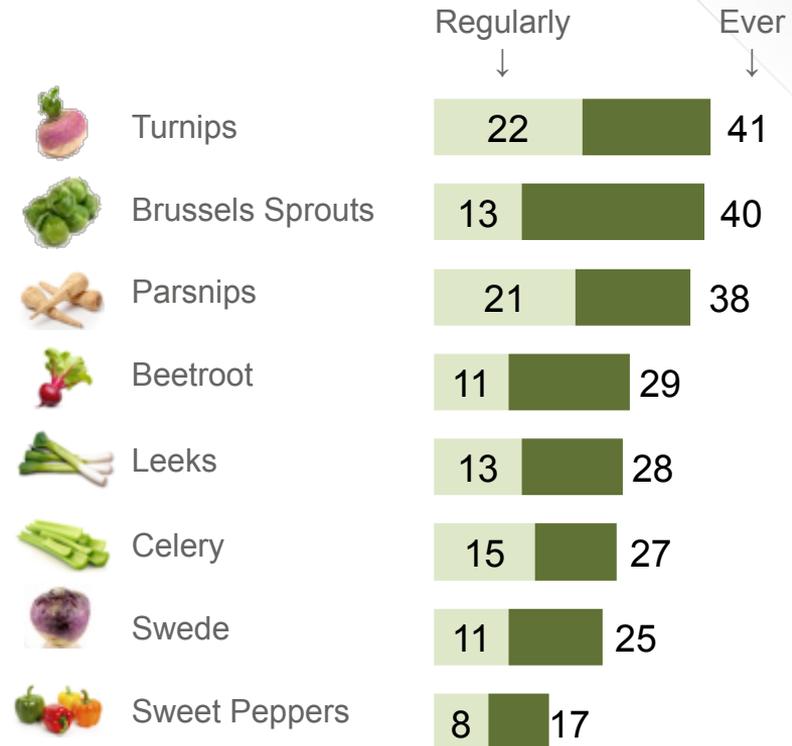
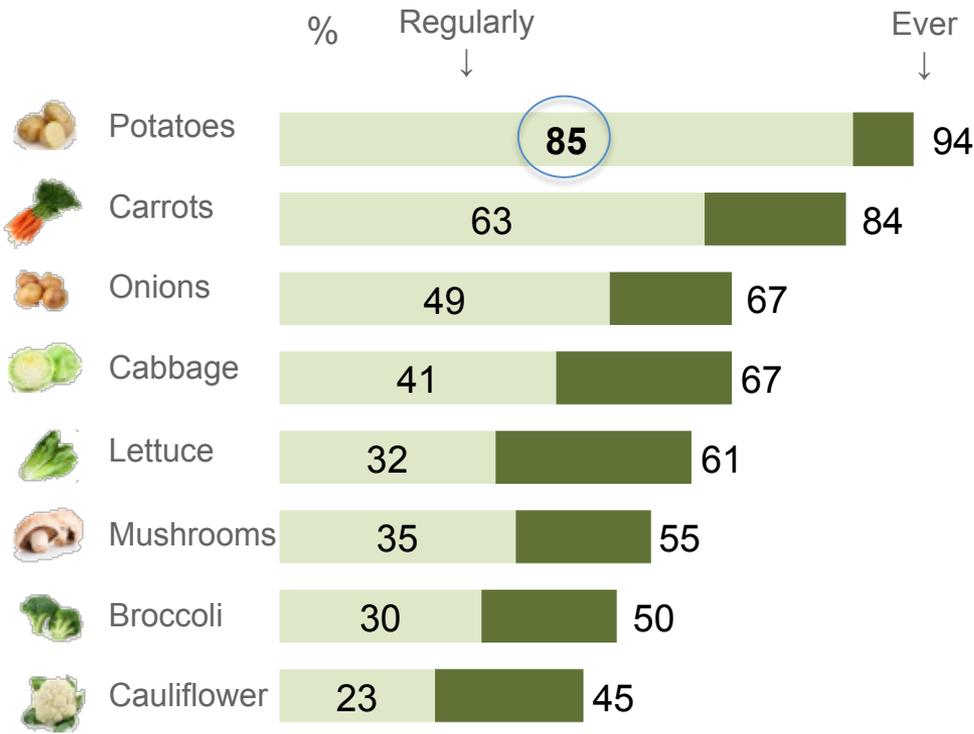


Importance of purchasing *Local Food* by category



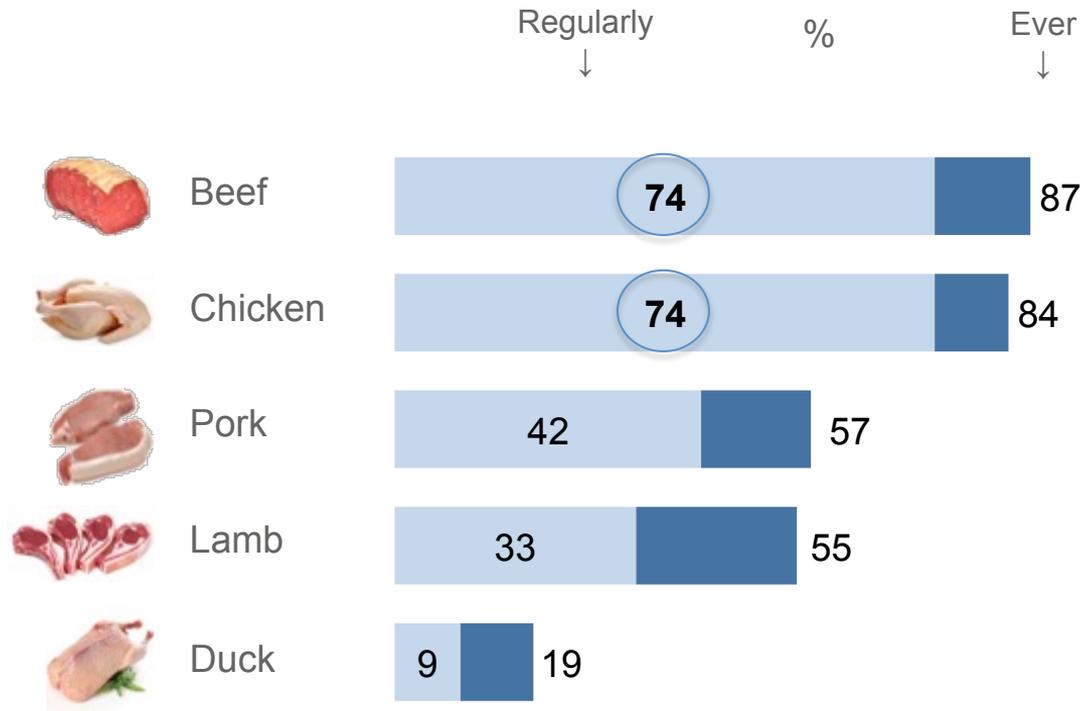


Local vegetable purchases





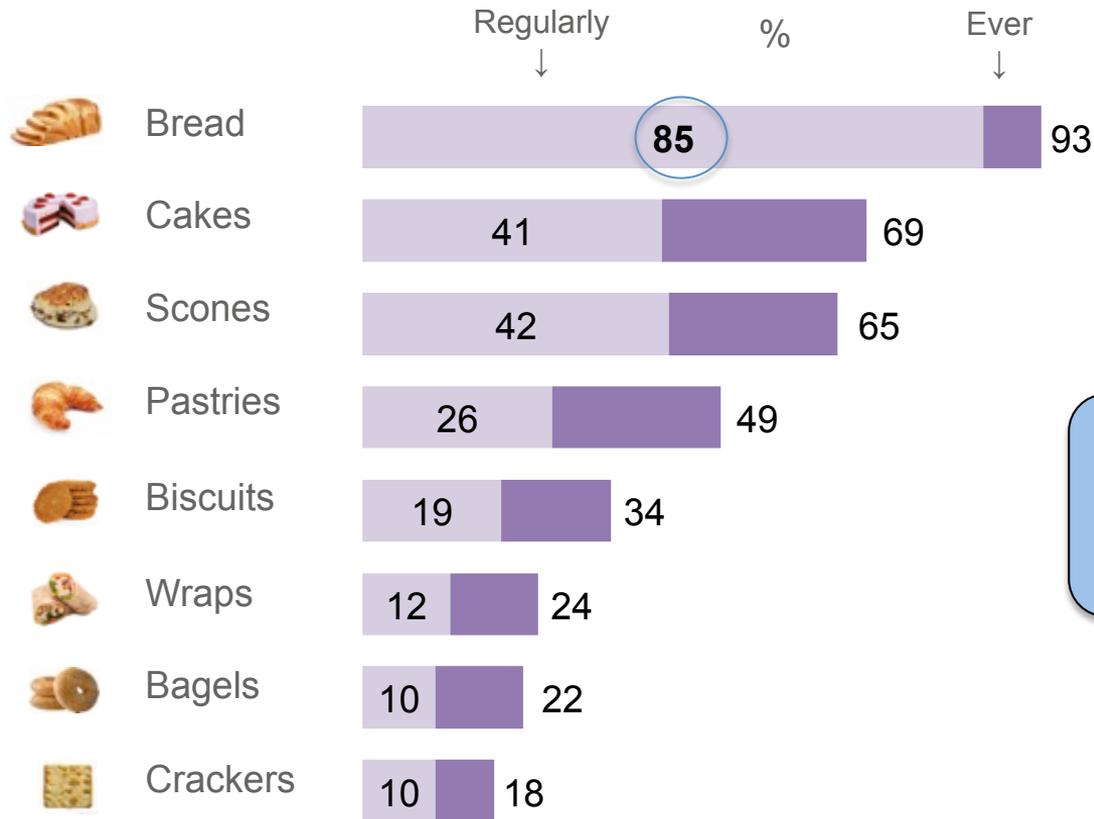
Local meat purchases



3 in 4 consumers claim to purchase local beef & chicken on a regular basis



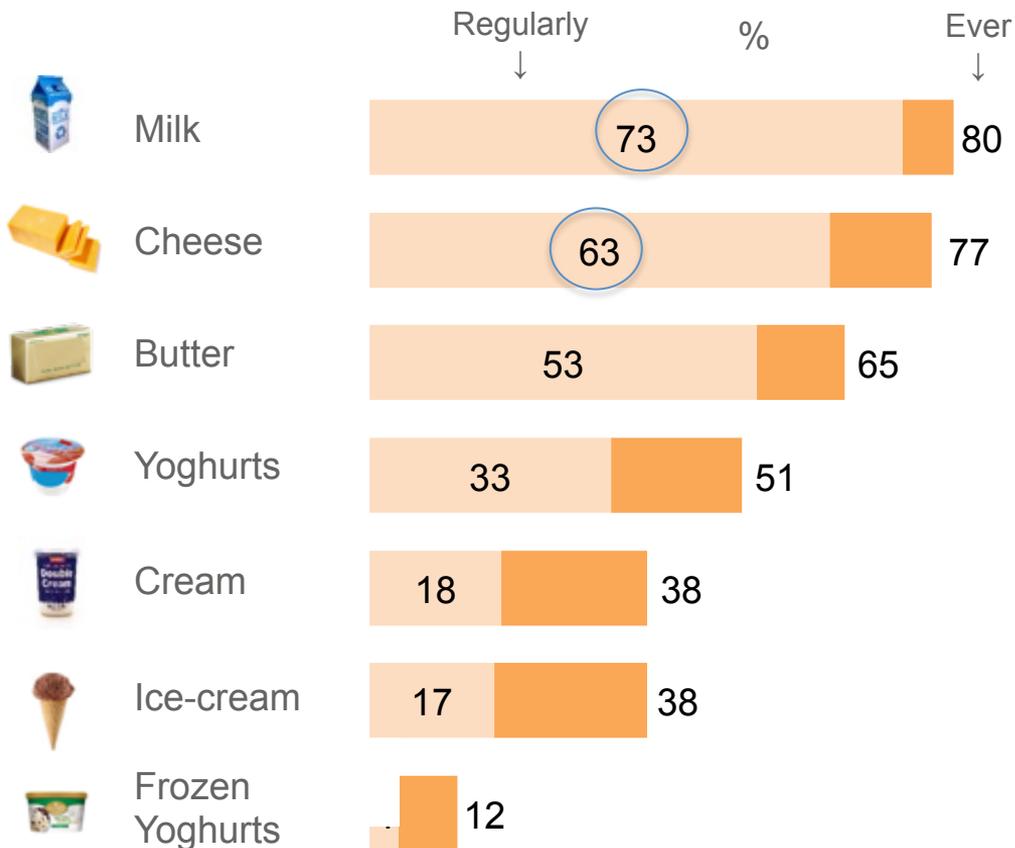
Local bakery purchases



Nearly 9 in 10 consumers claim to regularly purchase local breads



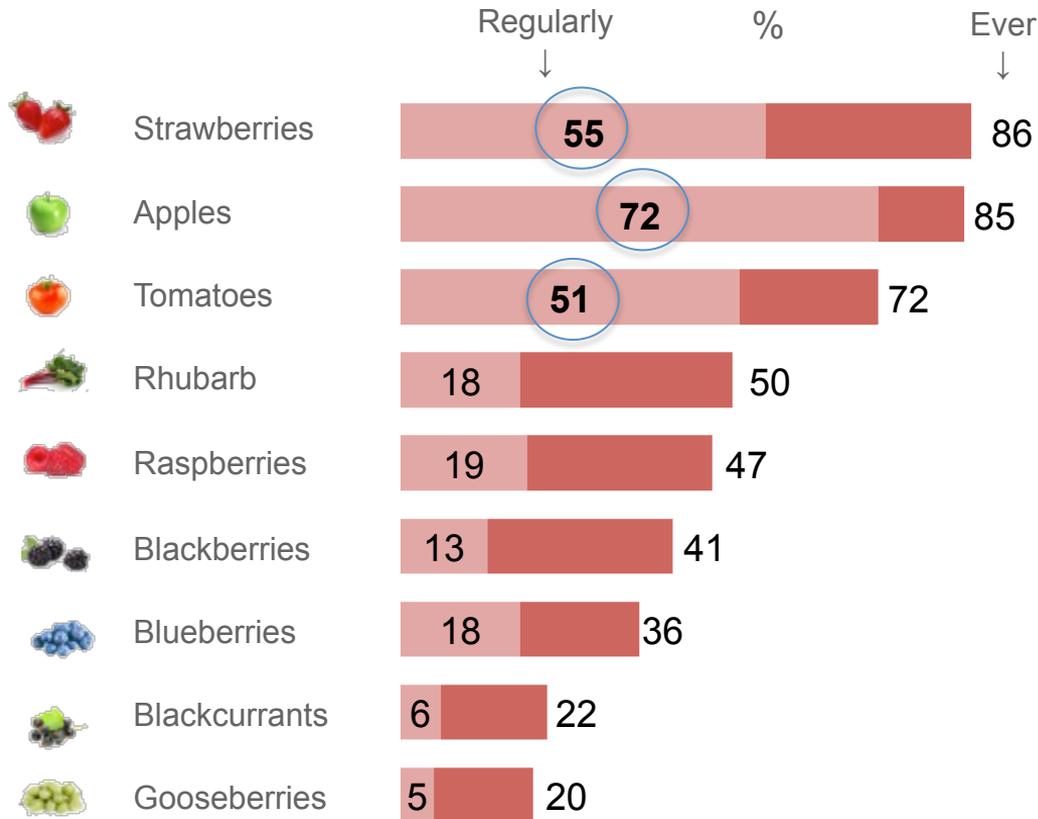
Local dairy purchases



Three quarters claim to purchase local milk regularly



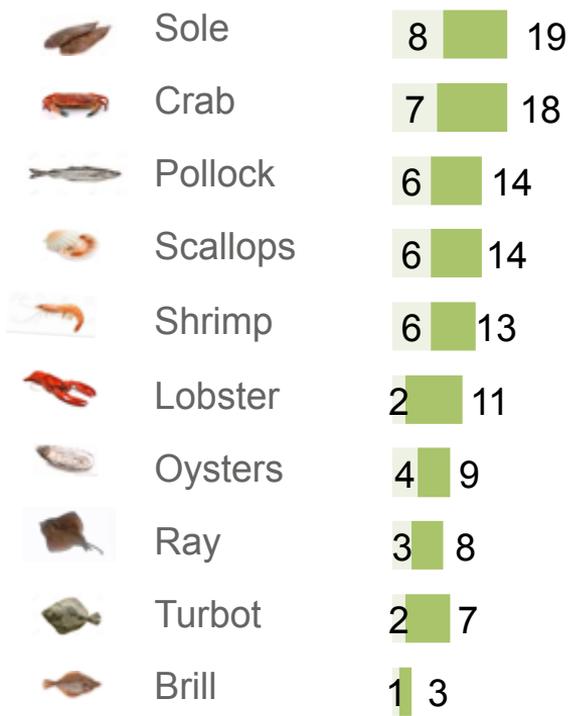
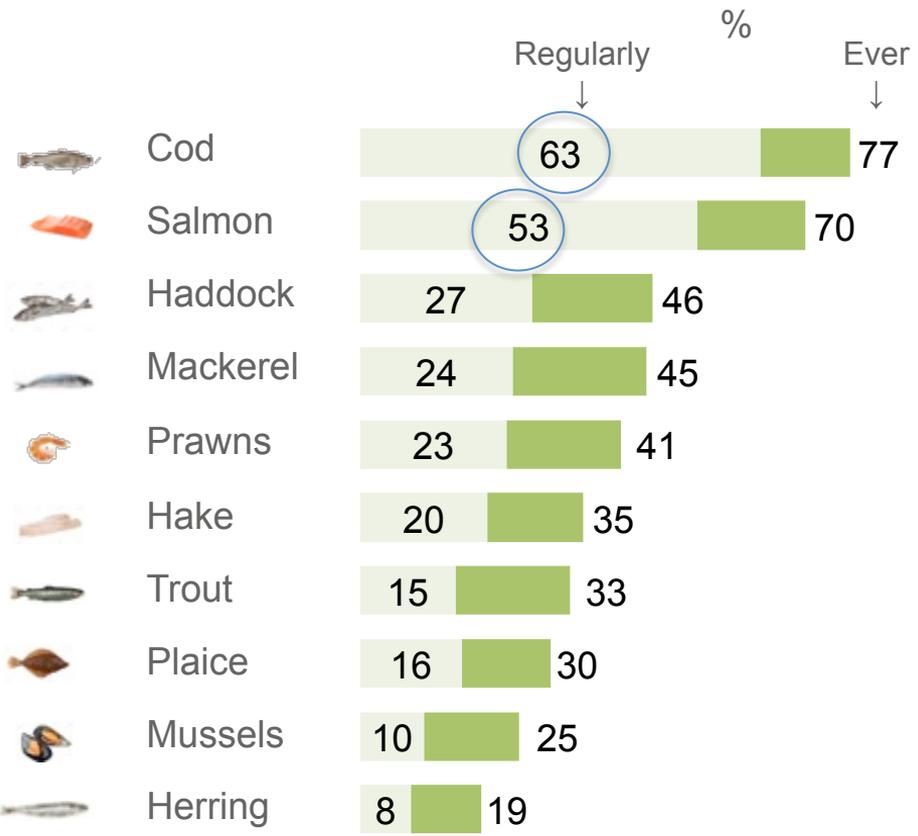
Local fruit purchases



Apples are the most commonly purchased local fruit with just under 3 in 4 claiming to purchase regularly

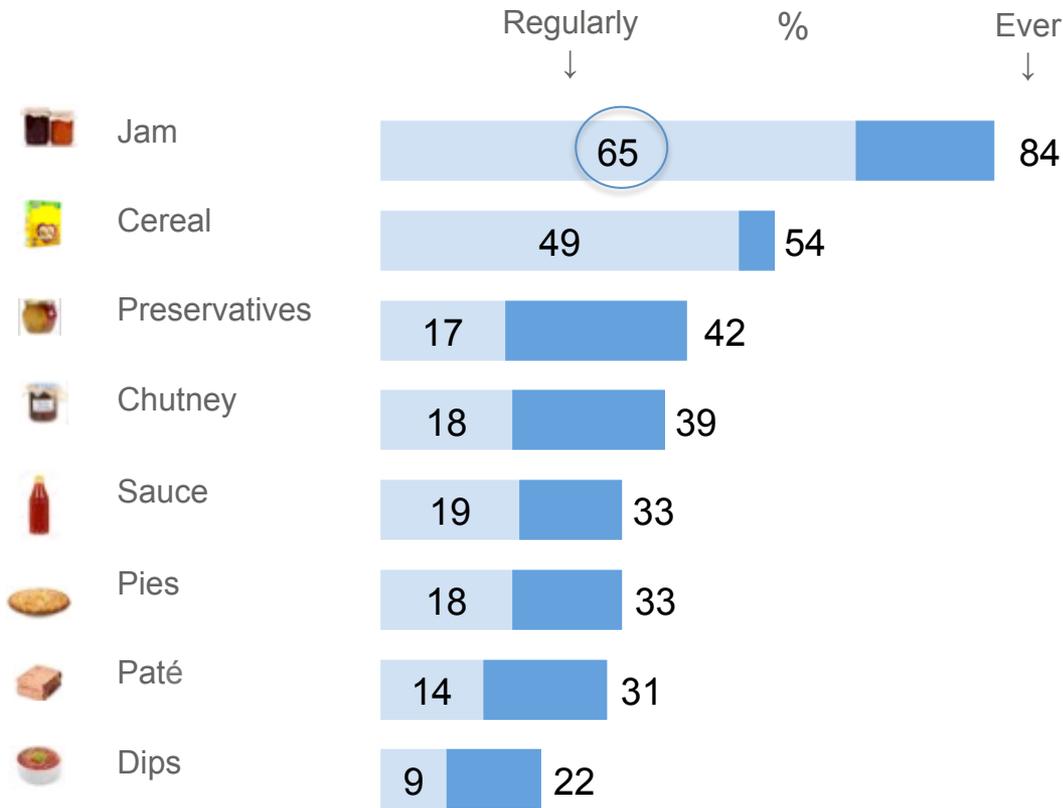


Local fish purchases





Local grocery purchases



Two thirds of consumers claim to regularly purchase local jams



Local alcohol purchases



Regularly



Ever



Lager



Cider



Ale



Whiskey



Stout



Cream Liqueur



%



Vodka



Gin



Brandy



Rum

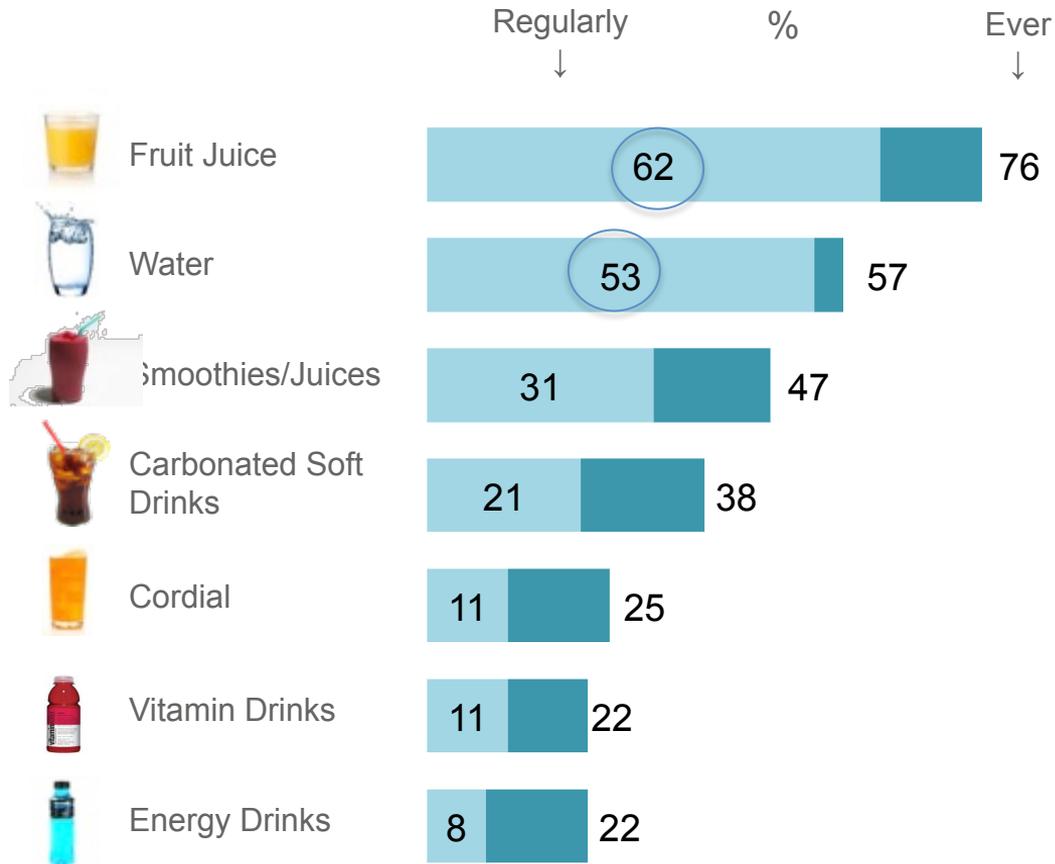


Poitin





Local non-alcohol drinks purchases



Over 3 in 5 claim to purchase local juice on a regular basis

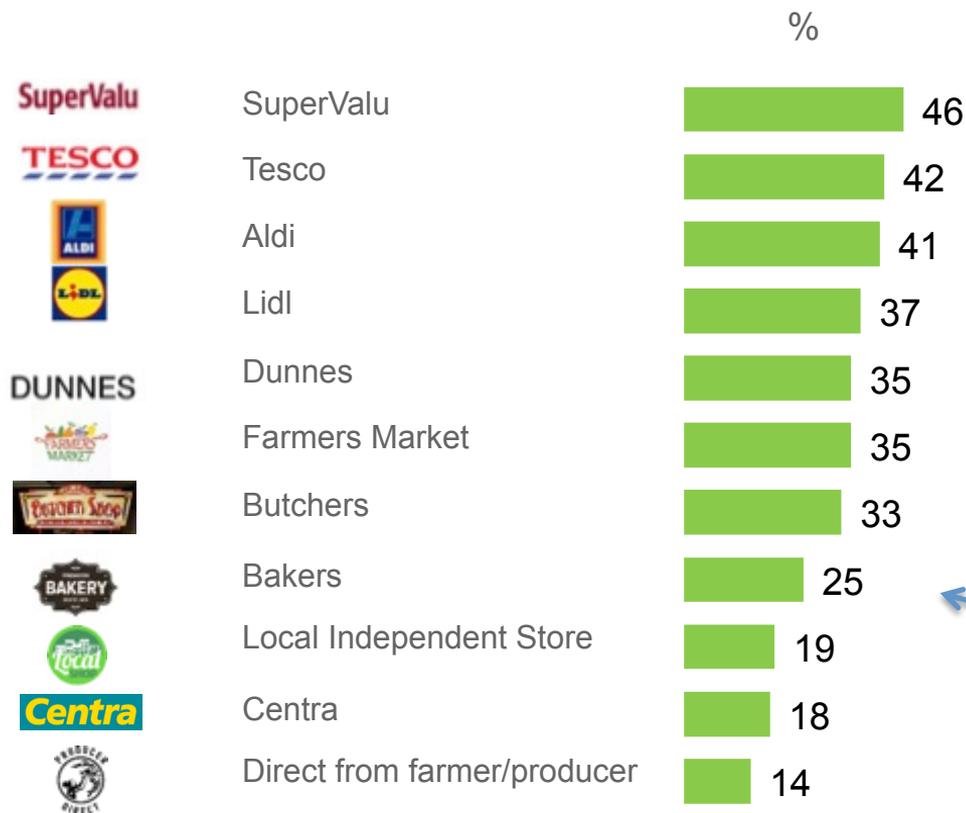
Local within the retail environment



Retailers associated with *local food*

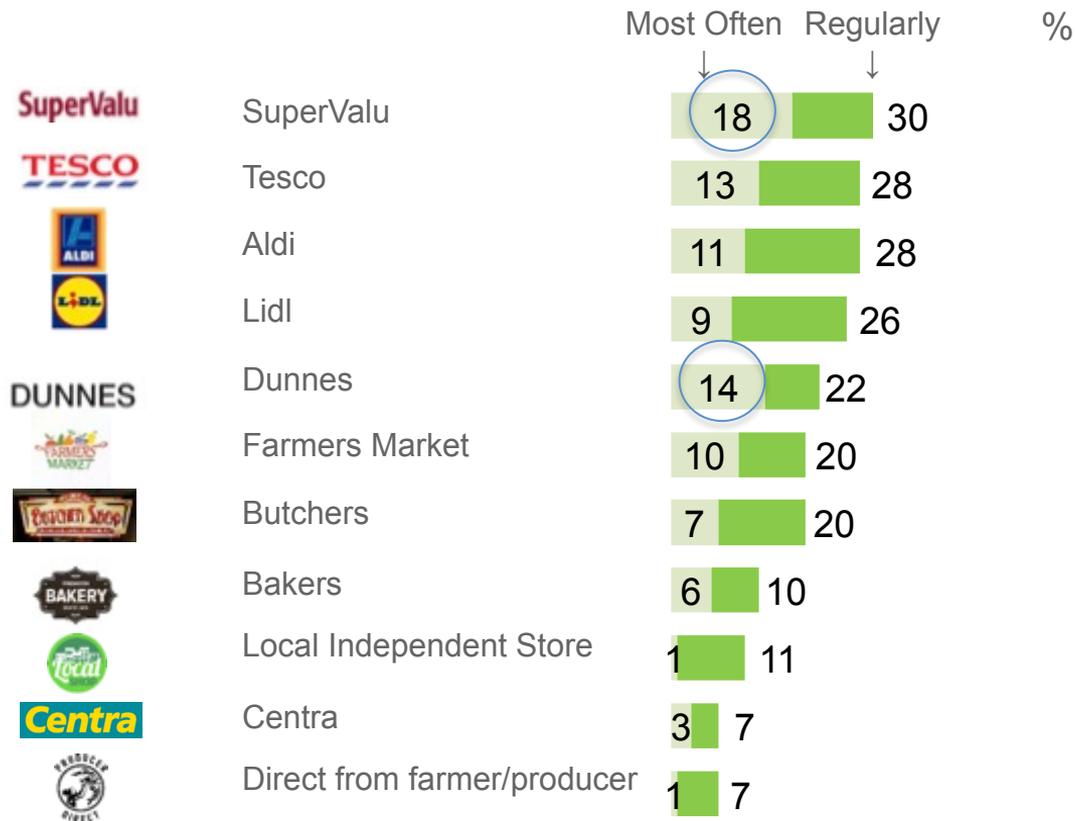


Retailers (ever) purchased from - *local food*



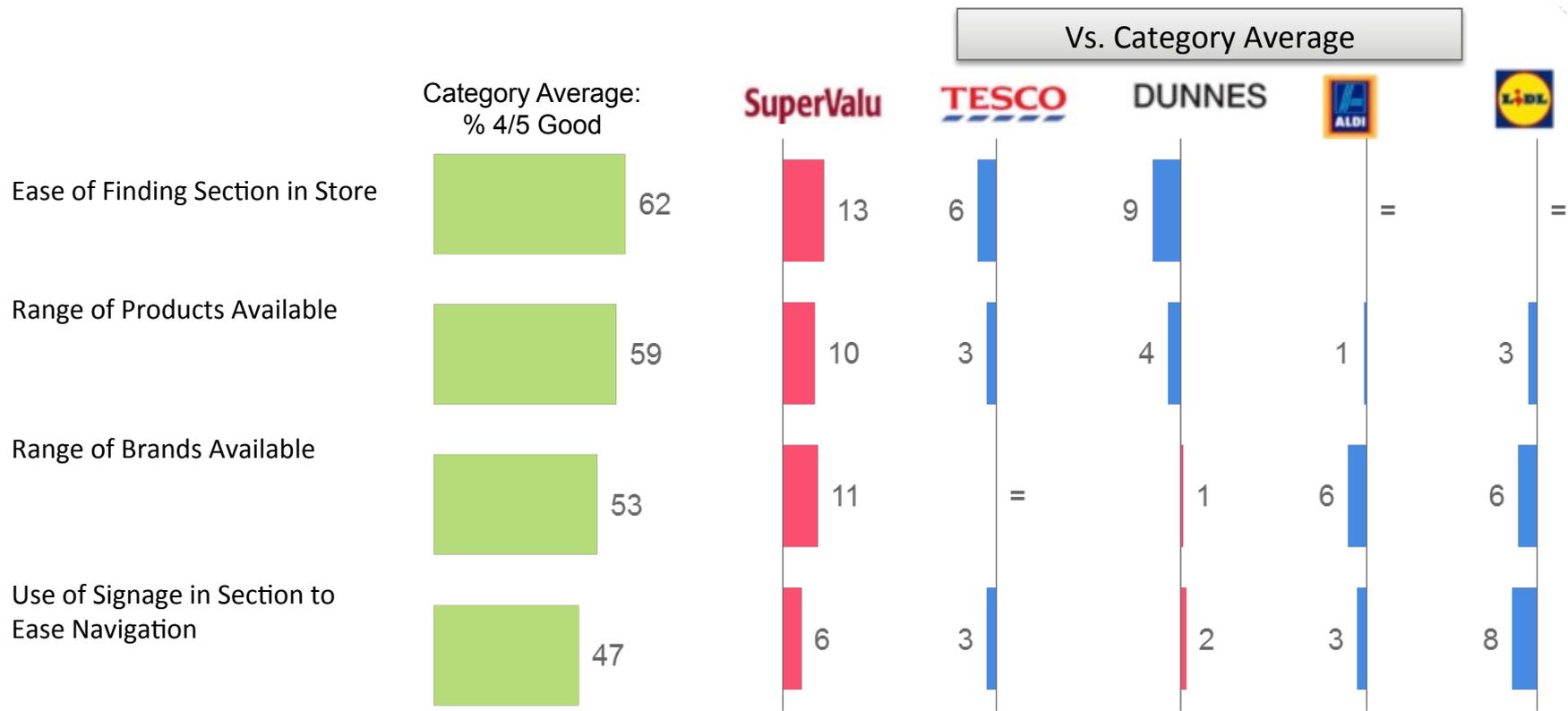
Local food purchases are more common in supermarkets than they are in local independents.

Retailers purchased from - *local food*



Supervalu & Dunnes are reported to be visited most often so as to purchase local food.

Evaluation of *local food* sections



SuperValu outperforms the category on all metrics – significantly ahead of all other retailers.

SuperValu



- ✓ High praise afforded to SuperValu for it's promotion of 'local' food.
- ✓ Regarded as the best supermarket for 'local' food.
 - ✓ Segregated section/clearly displayed.
 - ✓ Often has in-store tastings.
- ✓ A sense that SuperValu is a real part of the community.
 - ✓ Familiar with staff/local to the area.
 - ✓ Recognisable customers.
 - ✓ Give money back to the community e.g. sports jerseys.
- ✓ Most claim to enjoy the overall experience of shopping at SuperValu.
- ✓ Living up to their slogan of 'Real Food, Real People'.

"SuperValu are a very personal shop. They get involved locally and you know the staff and management." Cork, Young Professional

"SuperValu take more pride in supporting local, like even their logo is 'Real Food, Real People.'" Galway, Empty Nesters

DUNNES

The Tesco logo consists of the word "TESCO" in a bold, red, sans-serif font. Below the text are four horizontal blue diagonal stripes.

All other retailers regarded as somewhat inferior to SuperValu when seeking 'local' food products.

- Lack of awareness of the local products/brands available in both Dunnes and Tesco.
- Tesco not regarded as Irish therefore struggle to be associated with 'local'.

*“Some of the bigger retailers are more concerned with margins, whereas SuperValu is more integrated into the community.”
Galway, Empty Nesters*

“Dunnes don't really do anything to support the local produce, strong focus on their own brand.” Sligo, Families

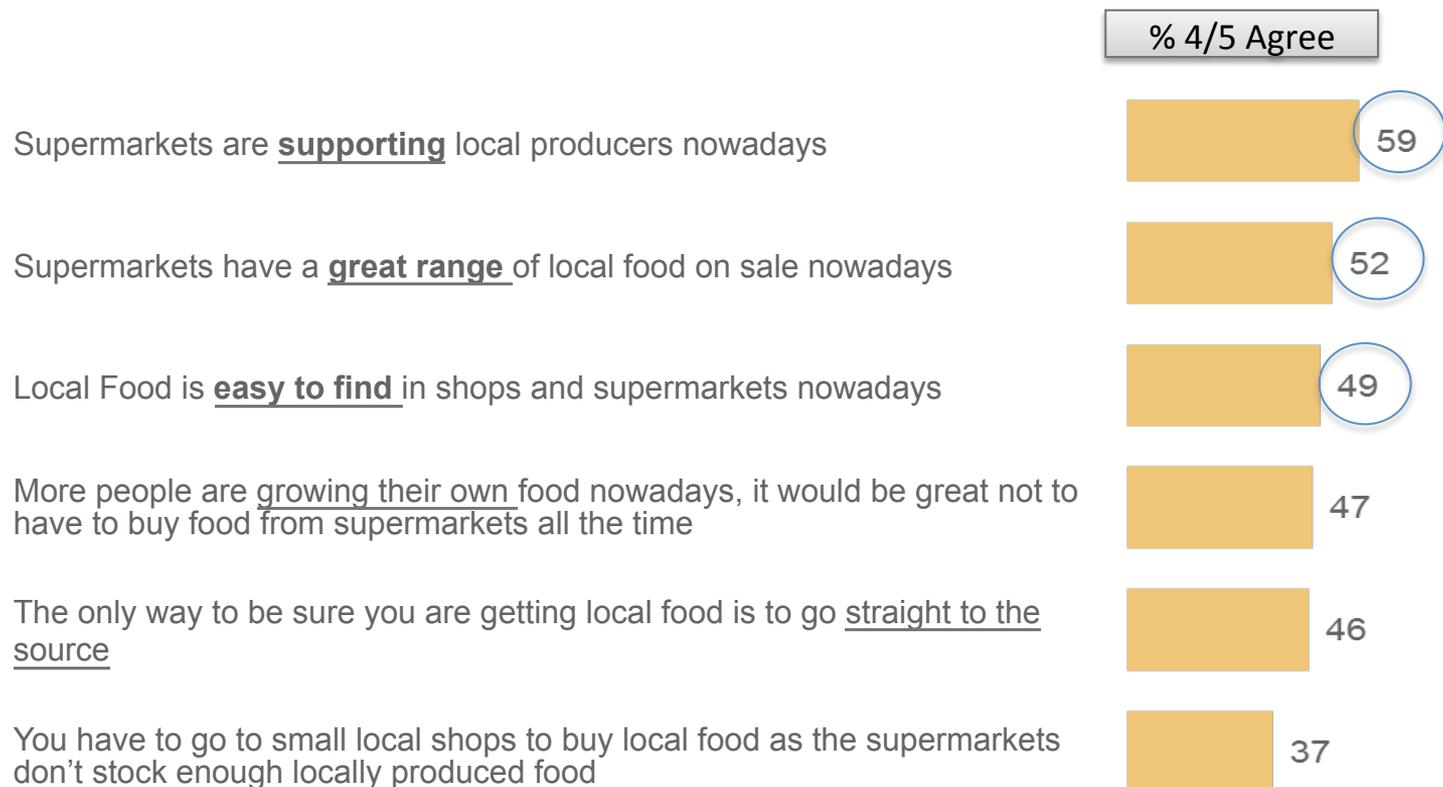


- ✓ Widespread praise for the Discounters (Aldi and Lidl) offering more 'Irish' products than before – particularly Aldi.
 - ✓ However, not necessarily regarded as 'local'.
- ✓ Aldi performing very well in Tipperary for 'local' produce, particularly in relation to meat (Local consumers know the farmer on pack from Tipperary).
- ✓ A niche cohort aware of Lidl's 'Taste of Success' – positive associations as a result.

"Lidl and Aldi promote local and Irish to me as you always see the ads promoting meat coming from local farmers." Dublin, Young Professional

*"I think since the Taste of Success, Lidl has become more popular."
Sligo, Families*

Attitude towards the sale of *local food*

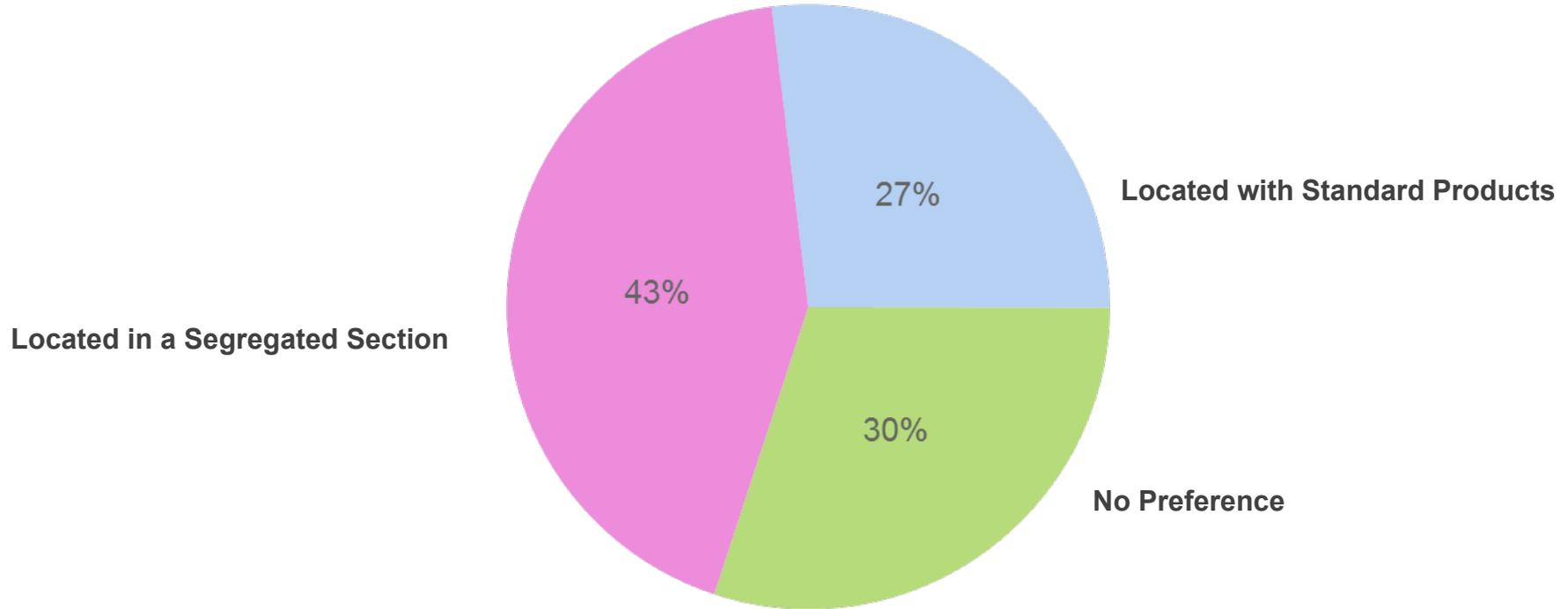


Where should *local food* be positioned in-store?



'Local Food' Products to be...

Base: All who purchase local food- 951

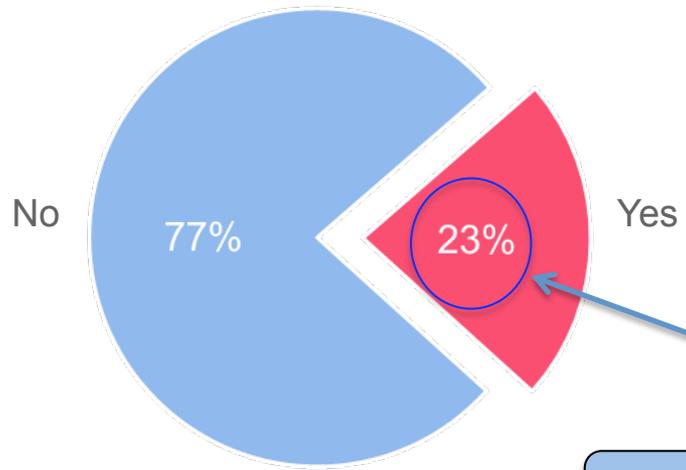


Think about where your product will be located in store. Are you competing with other local brands or are you competing with mass/mainstream brands?

Awareness of the Food Academy



Awareness



1 in 4 claim to be aware of the Food Academy

Ever purchased from the Food Academy

Although most were familiar with the range of 'local' food products/brands available in SuperValu, and the segregated area; awareness of the term 'Food Academy' was minimal.

Regarded as a destination shop by some when looking for something new/different.

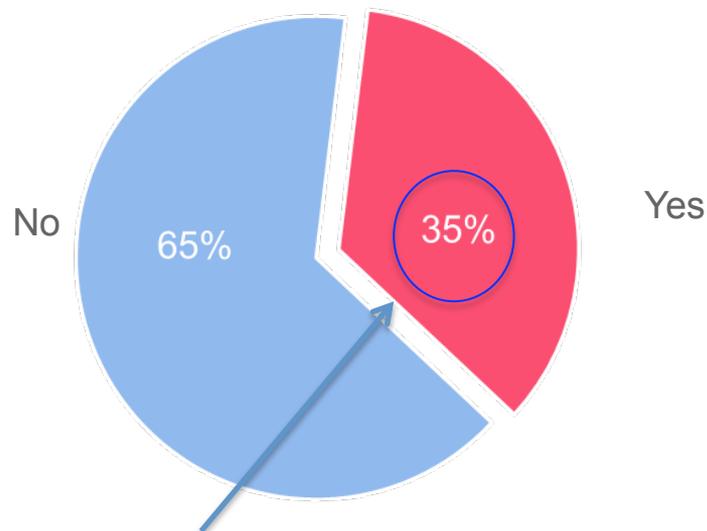
Opportunity to promote the Food Academy in-store via in-store tastings with the farmer/producer – promoting/showcasing a different product every other week



Giving Small Producers a Big Chance

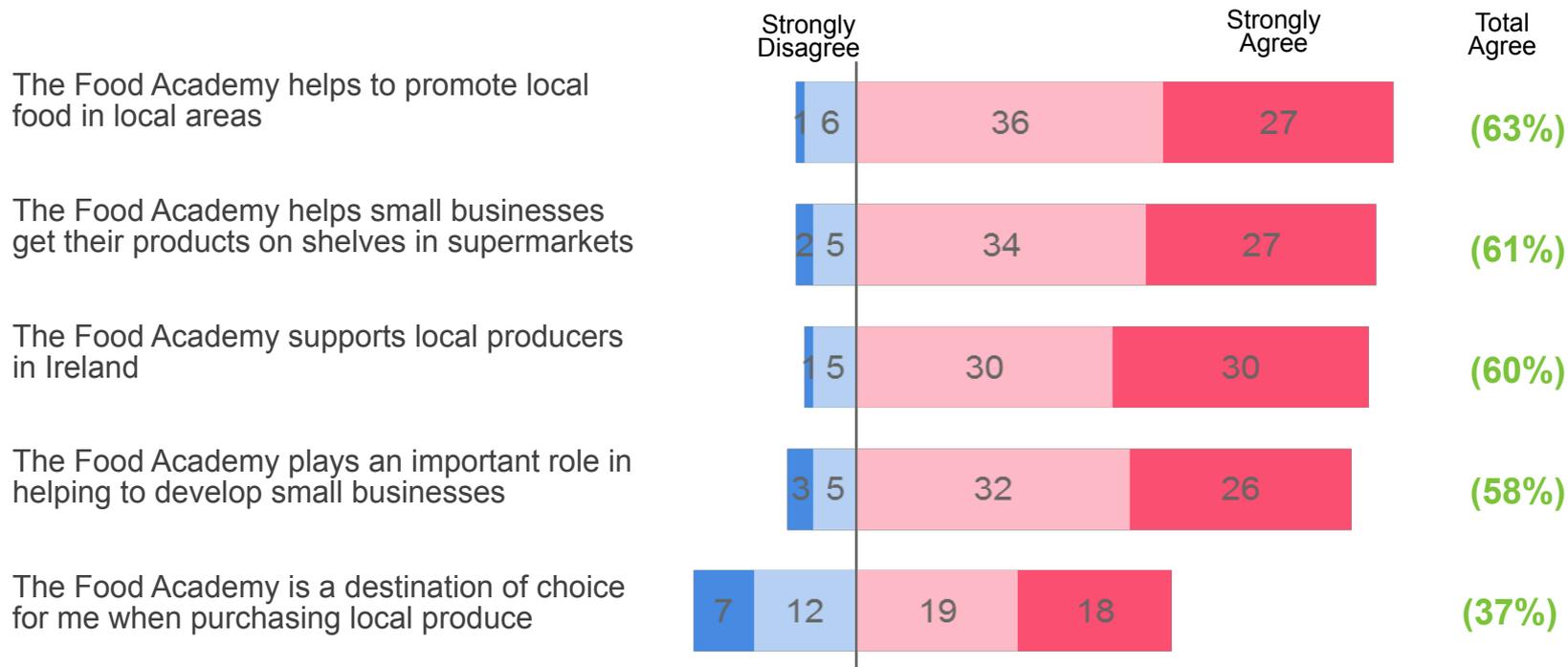
Base: 221

Previously Purchased From The Food Academy?



1/3 who are aware of Food Academy, have purchased from

Attitudes towards the Food Academy



3 themes for communicating local



Stories Sell!

So, a local food brand is one that is defined as having a story to tell. Particularly for new consumers who aren't familiar with your brand or may not have trialled your product. A brand story is the hook to help reel this consumer in for trial.

It means different things to different consumers and different people.

It is hard to tell a single “local” food story

A single “local” designation for talking about this diversity means that we may be limiting our possible communications with consumers or other producers.

Therefore we need to think about our own story and what we should be communicating and to whom.

CONCERN

Local Food as a...

**Moral/Political
topic**



CONCERN

In order to frame our story there are three themes of communication that we can apply. The first being “Concern”

This theme of communication positions local food in opposition to the threats posed by “Global Food”. This opposition is presented as resisting the economic threat e.g loss of jobs, money going out of the community or economy. Resisting against social and cultural threats is also relevant as local food often protects tastes/recipes/traditions of the past.

It is a modern aspect of the contemporary food culture that we mentioned earlier. Consumers see local food as a critical means of achieving this and see it as their duty to do so. In this instance, a producer communicating along this theme will position themselves closer to those consumers who share their values. The relationship in this instance is very much constructed as a co-operation, working together to oppose large retail.

The concern theme appeals to consumers as citizens so that, in their consumption of local products, they are making better choices for their society.

COMFORT

Local Food as a...

**Personal/Emotional
topic**



COMFORT

Comfort positions local food within the personal world of producers and consumers, motivations stem from emotional factors such as personal involvement and attachment to a person or place. The comfort narrative uses the relationship between food and their sites of production or origin. This can also cover cultural memories and practices.

Consumers and producers are connected via local food as it bonds people, whether to friends, family, places, the past or the present.

Producer biographies and personal accounts of motivations and social media interaction with consumers help to reflect this theme. The level of detail and nature of the relationship between the producer and the consumer is significantly more personal than that of a “non local” counterpart.

Belonging and attachment has a social/cultural value, by bonding consumers to and maintaining the traditions of the past.

COMPETITION

Local Food as a...

**Rational/Economic
topic**



COMFORT

Competition positions local food within a commercial world, beyond the political or personal.

Motivations to purchase local food are explained rationally by consumers e.g. In terms of convenience, cost, quality. In this instance, the support of local food is seen to have a private, economic benefit.

Here, the conversation should talk about an emphasis on quality and a setting out against the competition. Rational and economic conversations are based on frugality, efficiency and thrift in food purchasing, preparation and consumption.

Therefore it becomes irrational to spend more time and money on local foods without an objective reason to prefer them over food bought in multiples. In this instance, producers should talk about proximity and the specific product and production benefits.

Recommendations



Summary

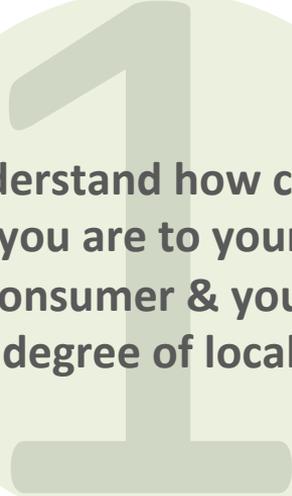


- ✓ Local food has **evolved** into the mainstream since 2010
- ✓ It is not just about the local hero anymore, but **the location/origin/provenance** of the product
- ✓ Local is a **by-word** for fresh with layers of meaning
- ✓ Local is all about quality, natural, 100% Irish ingredients which make it “**better for me**”
- ✓ **Lack of trust & scepticism** has been broken down by local producers, it is no longer a barrier to purchase
- ✓ Consumers have a **strong desire** to support local & help with the success of local producers
- ✓ They have an appetite for **greater availability & accessibility** to local products
- ✓ The more mainstream & routine nature of local food means that local producers need to compete on a **rational & economical** level i.e. communicating your product benefits
- ✓ The importance of your **story** is key to influence new consumers & a key purchase trigger

It's all about fine tuning your story and tailoring your communication to the relevant target audience...



It's all about fine tuning your story and tailoring your communication to the relevant target audience...



**Understand how close
you are to your
consumer & your
degree of local**

It's all about fine tuning your story and tailoring your communication to the relevant target audience...



1

Understand how close you are to your consumer & your degree of local

2

Understand which of 3 themes you should dial up or down depending on your audience

It's all about fine tuning your story and tailoring your communication to the relevant target audience...



1

Understand how close you are to your consumer & your degree of local

2

Understand which of 3 themes you should dial up or down depending on your audience

3

Tailor your communications for new opportunities & new target consumers



Thank You



The Thinking House
BORD BIA INSIGHT CENTRE

Local Food

Understanding Consumer Attitudes

January 2017