The Thinking House

BORD BIA INSIGHT CENTRE

Shopper Insight

Butter

2018

Butter

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Research partners





Methodology and Approach

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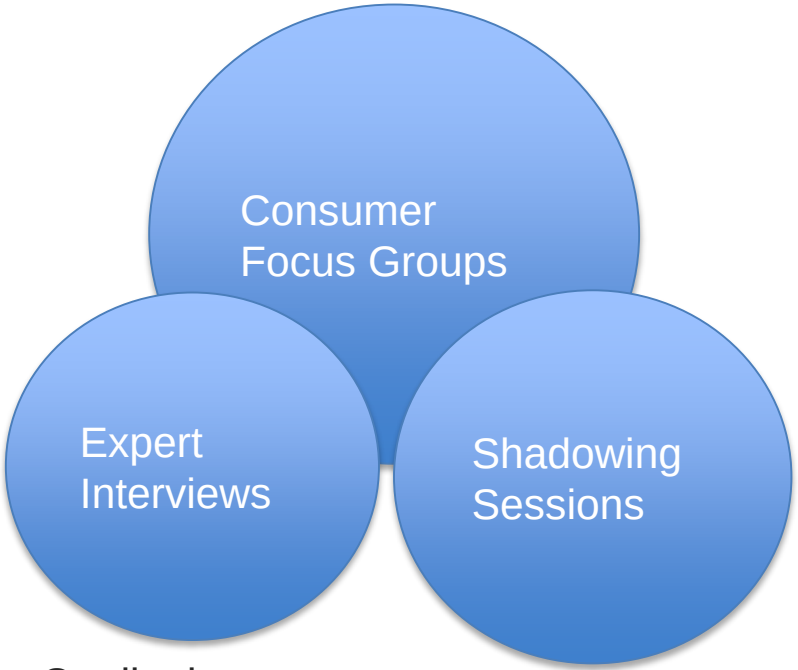
Research Methodology

Fieldwork was conducted between March & May 2018

N=1023
nationally
representative
Butter buyers

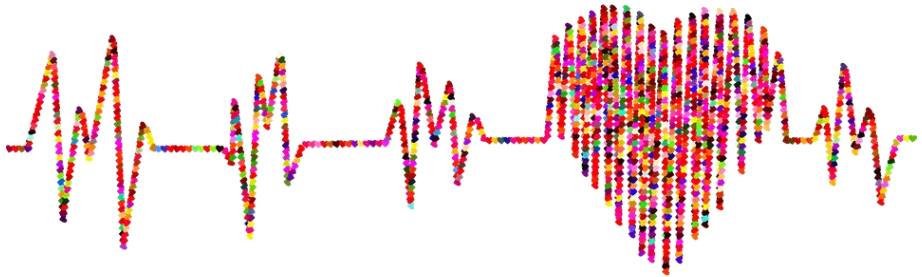
Quantitative



Qualitative

Category View: Butter, Spreads & Margarine

“61%% of people say they couldn’t live without butter”





It’s a firm favourite.

91% say everyone in the house can eat it



It’s **all** about the taste



- **94% of people say it tastes great**
- **93% of people say kids will eat it**

Its part of who we are

85% agree that it is part of us



“Butter’s in our heritage. Irish butter is the best in the world and that’s something to be really proud of.**”**

Younger family, Lidl/Aldi shopper

Spreads also get the thumbs up..



83% agree that everyone in the house can eat them

78% agree that they are versatile and can be used in lots of ways


But spreads are a little less of an Irish thing..56%

Frequency of Weekly+ personally consuming food categories

Base: All adults aged 18+ - 1,000





71%
(45% daily users)

Almost three quarters of respondents consume butter on a weekly+ basis

53%
(28% daily users)

Just over half of respondents consume spreads on a weekly + basis

Only 1 in 10 consumer margarine weekly+

CAPI omnibus (F2F) in March 2018.
N-1000 Adults aged 16+

Q.1 Using the following scale, how often, if at all, do you personally eat ...

Everyone Has Their Favourite

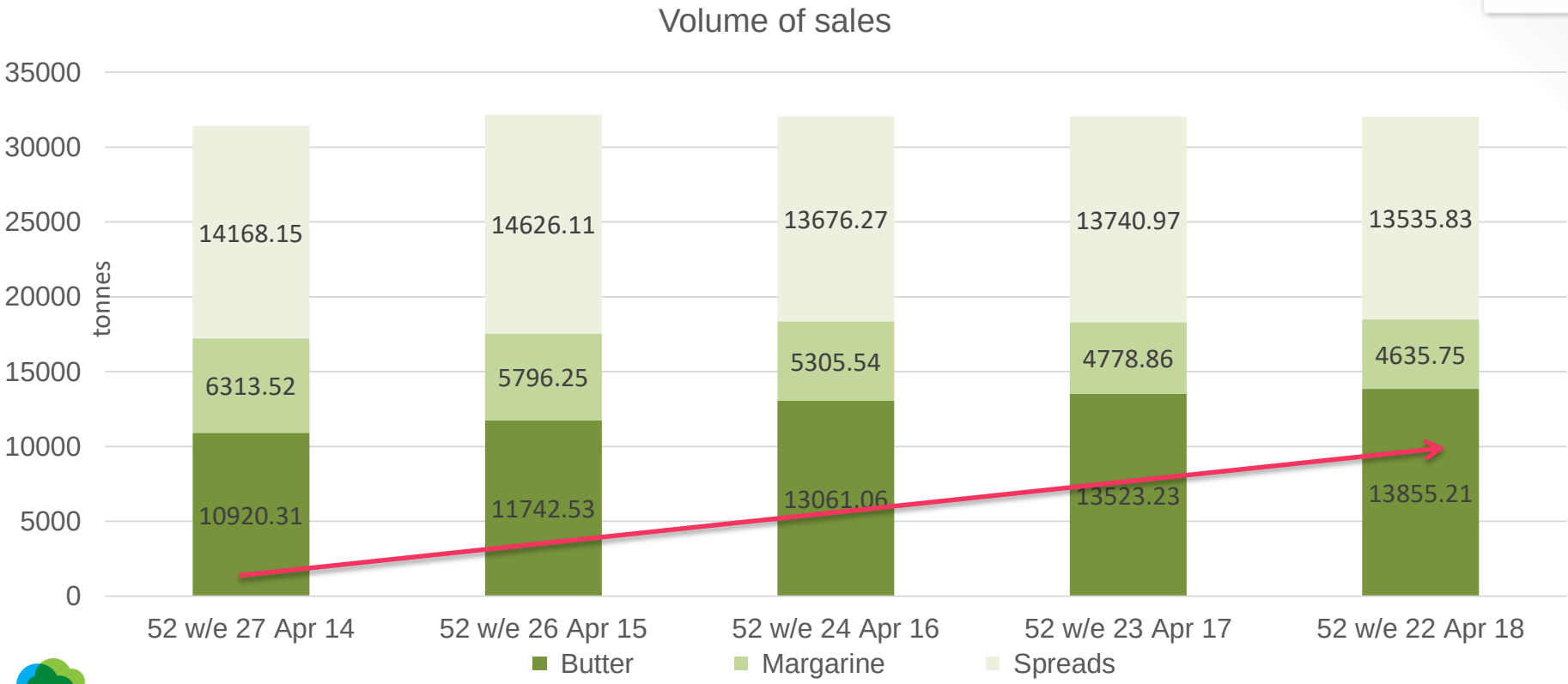
“I’ve always had Dairygold because it spreads so well. I couldn’t be bothered with real butter, because it’s hard as a rock when it comes out of the fridge”.

Older family, Dunnes/ Supervalu/Tesco shopper

“I’ll always have real butter because nothing else tastes anything like it. I’d rather have less butter on my toast than settle for anything else”.

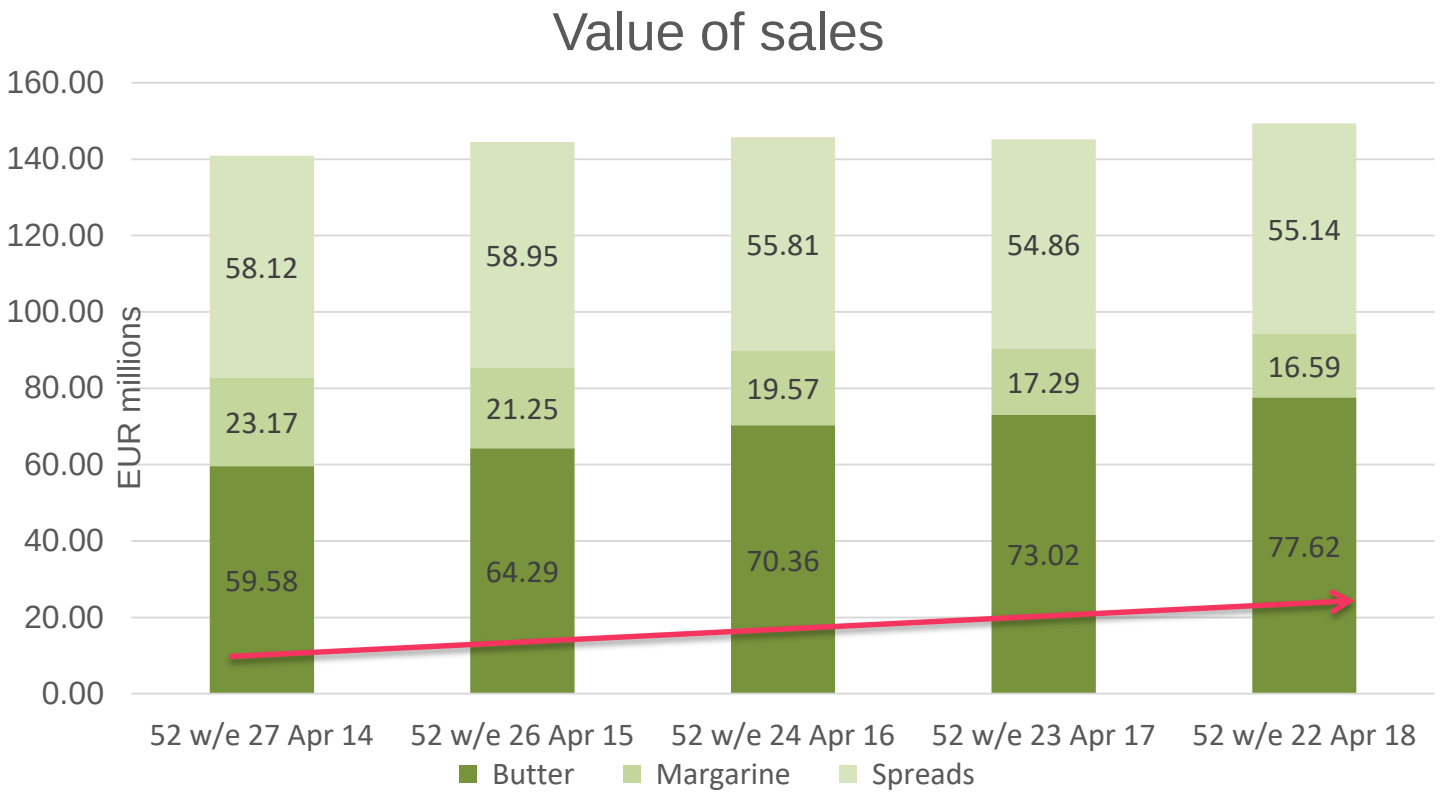
Empty-nester, Dunnes/ SuperValu/Tesco shopper

Volume sales of butter have gone up



(Kantar Worldpanel, 2018)

Butter value has gone up nearly 10% a year



52we 28th April 2018 – Yellow Fats - ROI

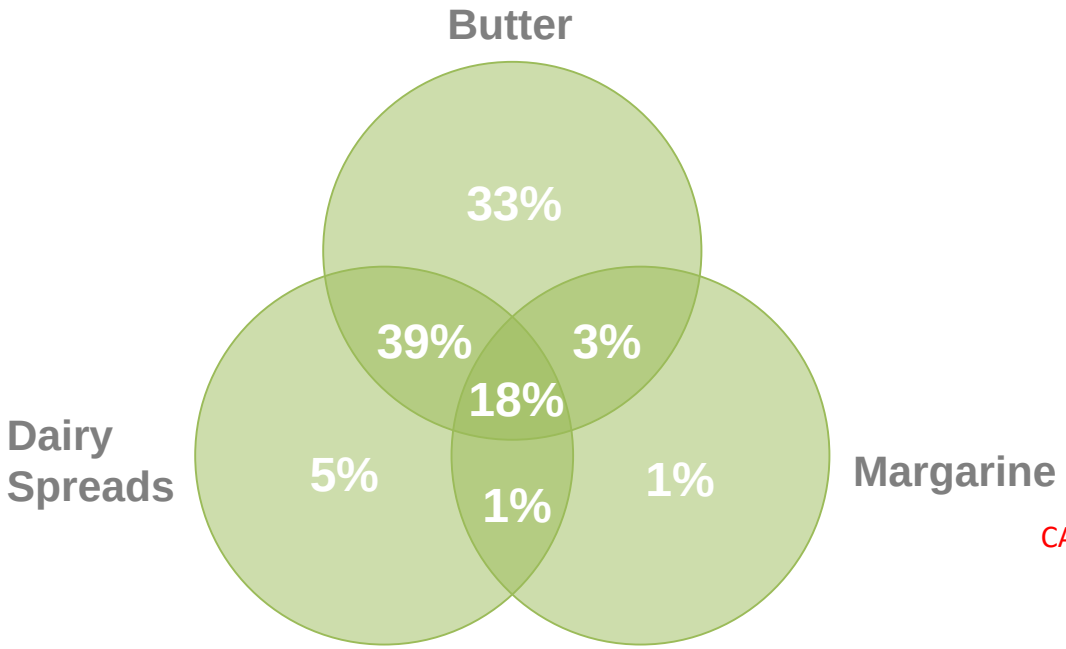
(Kantar Worldpanel, 2018)

What People are Buying

Significant overlap between butter and dairy spreads purchase

(Base: All adults 18+ who purchase butter, dairy spreads or margarine at least monthly)

How often do you purchase each of the following?



CAPI omnibus (F2F) in March 2018.
N-1000 Adults aged 16+

There is a watch it on potential private label conflict.

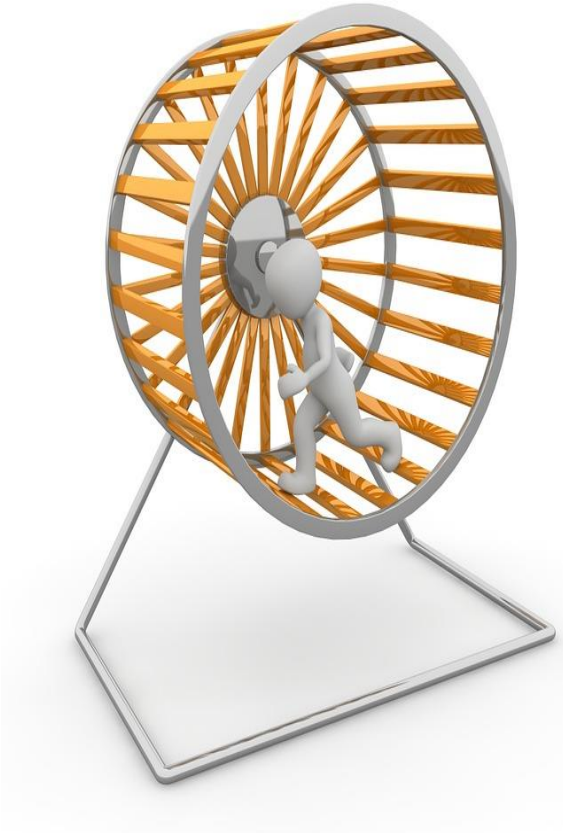


BUTTER	SPREADS
45% used to buy big brands but are now buyers of own label butter brands	33% used to buy big brands but are now buyers of own label spread brands
64% believe that all brands of butter are pretty similiar	66% believe that all brands of spreads are pretty similiar

It’s all about habit

People tend to buy the one type of butter and the same brand:
73%: butter
69%: spreads

They buy the same brand regardless of what’s on offer
45%: butter
51% spreads



In-store

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A look in-store



None of the stores are dramatically different from each other..

Supervalu perceived to be smaller and more artisan

All private label butters are considered good but PL spreads more challenged across the main multiples

This is a speedy part of the main shop!

A fixture that's not very engaging

While 85% of shoppers think its fine as is

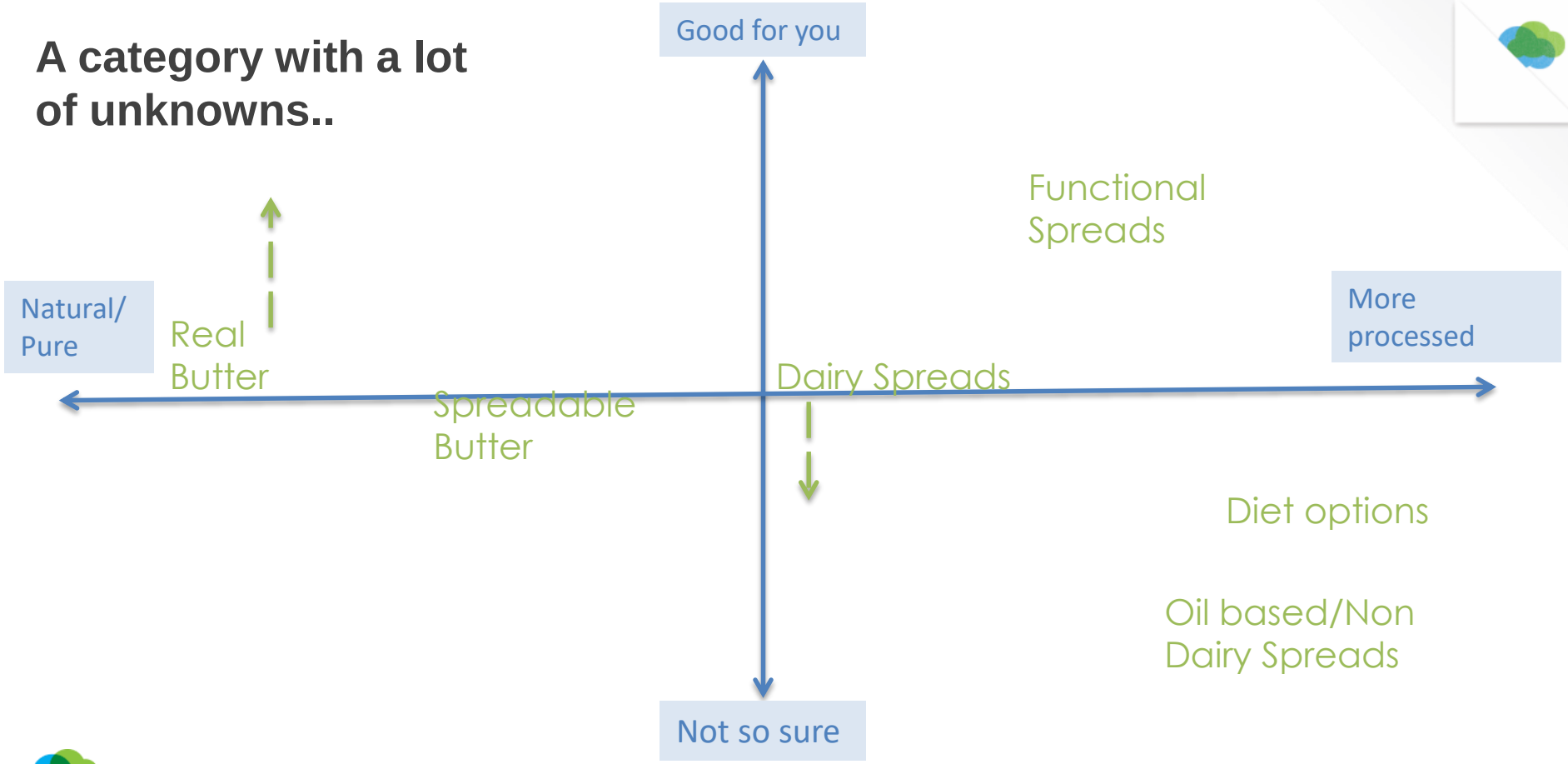
<u>60% think its boring..</u>

A 67% grab & go mentality

Not a category for browsing



A category with a lot of unknowns..




Category language not distinct enough!
Creamery butter
Butter
Spreadable margarine
Dairy spreads
Country butter
Oil based

Consideration for aesthetic….



"All that is gold does not glitter"







Not quite a wrap!



Chunky plastic jars with todays world



Foil wrapper can be messy



Parchment is still quite unique in this category

4 in 10 people would like to see new ideas for butter and 5 in ten for spreads









Limited awareness of new products available though they did engage some interest

Are they too niche?

What's Changing..What We Want?

85% Agree it's a Natural Food



"Butter is in a really great place right now. The health story is changing. It's homey, it's natural, it's a delicious product. And buyers are embracing that."

Category Expert

Health perceptions in the category have shifted, giving consumers free rein to embrace butter again but that's not without some tension.

While 48% of people think butter is good for you there are 24% who are concerned about the impact of butter on their health

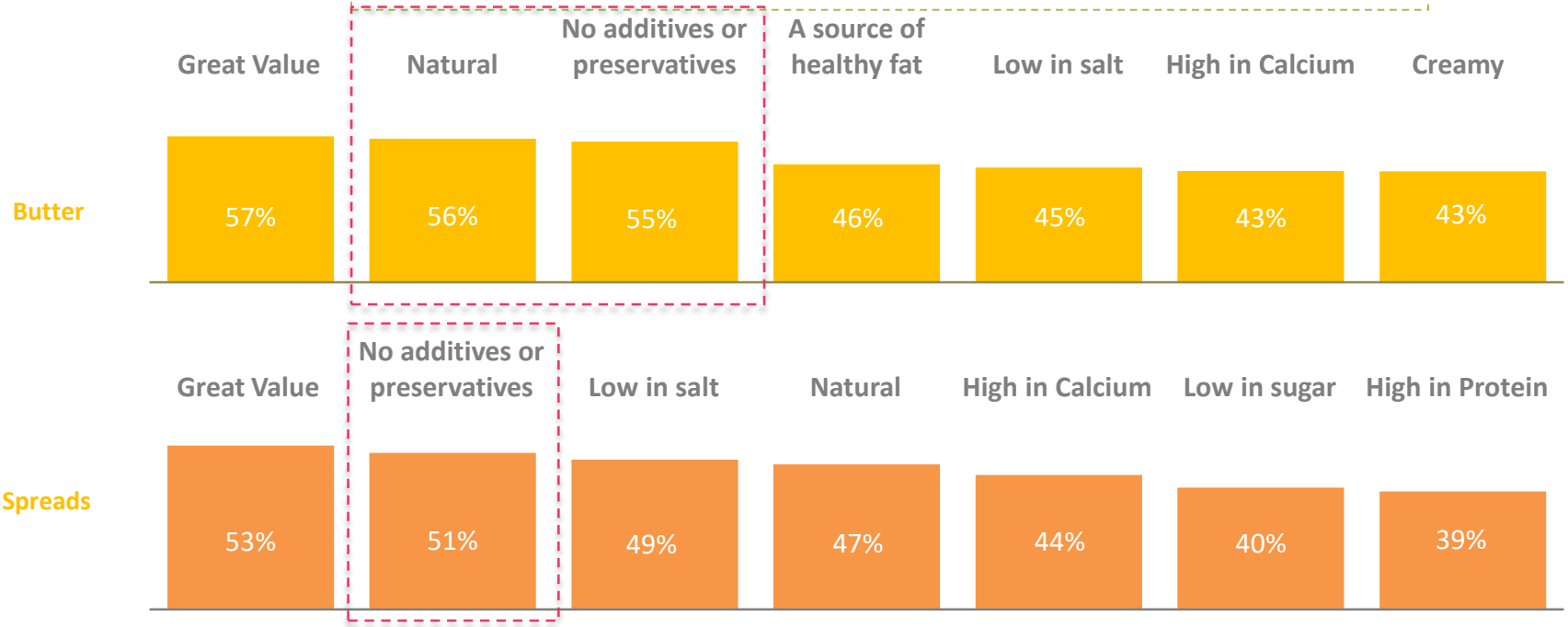


The relationship with spreads is less disparate With 30% saying they spreads are good for you and 27% being concerned about the impact on their health

Most Compelling Ways to Describe Butter

(Base: All butter monthly+ buyers n=517/437)

If the following words or phrases were to be used to describe butter/spreads would they make you more likely to choose it or less likely to choose it?



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Natural and "free from" the key requirements and influencers for butter and spreads into the future, in line with GNPD trends which saw a 250% increase in these claims on pack for butter and spreads

Bord Bia
Irish Food Board

There has been a 250% increase in butter margarine and other blend products claiming to contain no additives or preservatives, with these seeing the largest increase in NPD between 2013 & 2017



New butter and spreads containing rapeseed oil increased by 680% between 2013& 2016

(Mintel, 2017)

Consumer understanding of fat is improving

The stereotype that fat is “evil” has diminished. Brands of butter and margarine can leverage consumers' changing perception to give a positive "spin" to their fat content.

MORE RELAXED ABOUT "SAT FAT"

27%

of British consumers are less worried about saturated fat now than a year earlier

FAT IS ESSENTIAL

60%

of Polish consumers think that fat is an essential part of a well-balanced diet

DIVERSITY IS HEALTHY

49%

of French consumers say that using different types of oil is important for health

Base: *UK 1,890 internet users aged 16+ who have bought butter, spread, oil or fat in the last 3 months; Poland 1,000 internet users aged 16+; France 1,000 internet users aged 16+*

Source: *Lightspeed/Mintel*

A more health aware generation are more challenging about butter and spread usage (18-34s)

–Less loyalty to brands,more driven by taste than brand

–More health concerned with 37% having concerns about butter and health

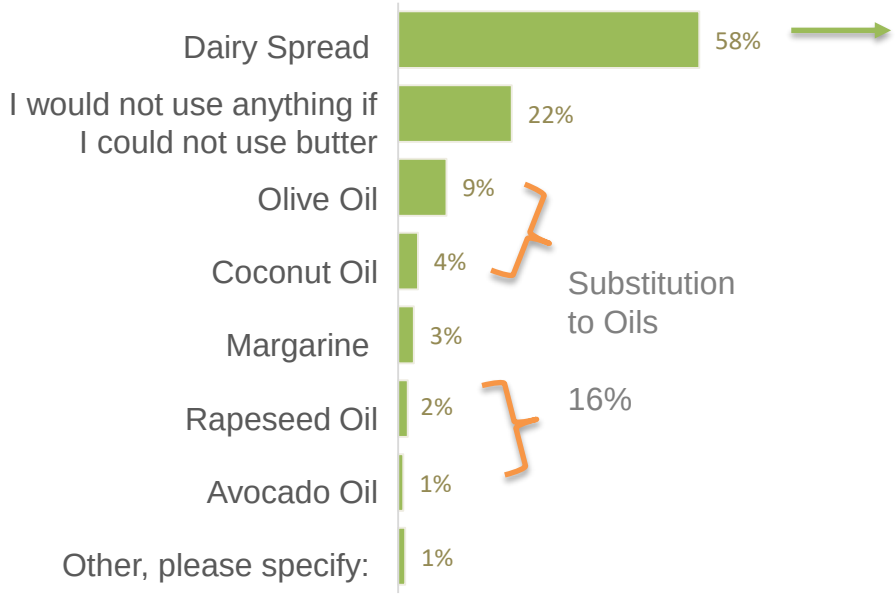
–More likely to switch to oils than any other age cohort

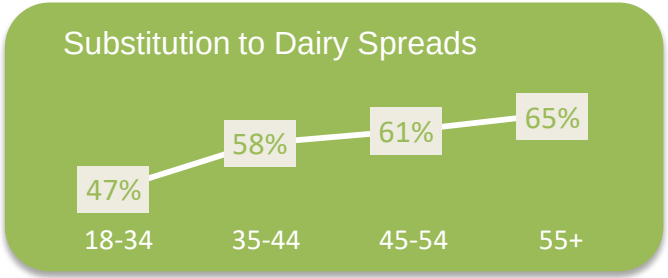


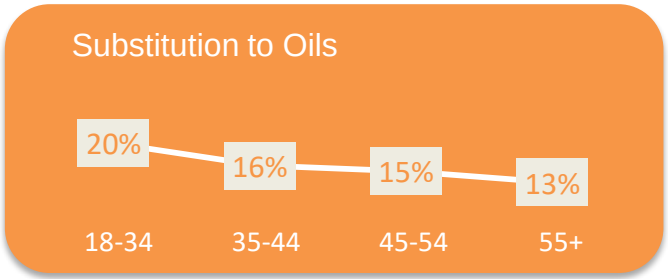

In the UK, **25% of consumers aged 18-24** would pay more for butter, spread, oils, or fats with health claims compared to 18% among those aged 55+.
UK 1,890 internet users aged 16+ who have bought butter, spread, oil or fat in the last 3 months
Source: Lightspeed/Mintel

Close to 60% of people are more likely to move to spreads if had to replace butter, with younger cohorts being more open to oils

If you had to replace butter with another type of spread, which type of spread would you be likely to purchase instead of butter?







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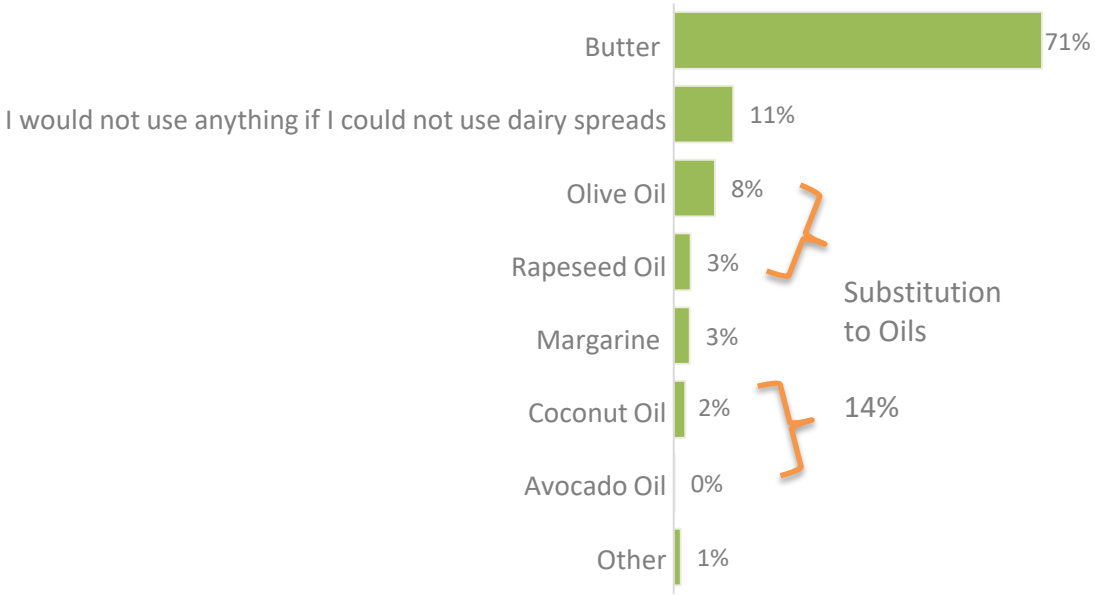
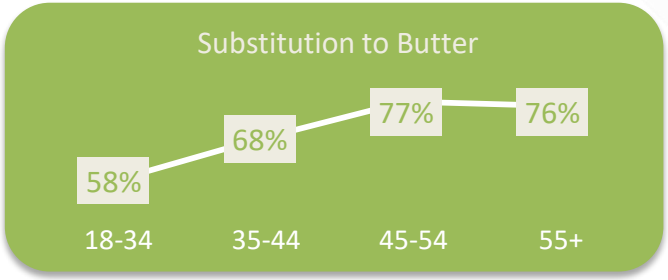
(Base: All butter monthly+ buyers n=517)

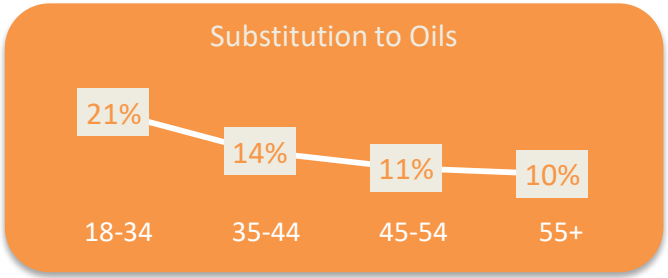
Bord Bia
Irish Food Board

More than 70% are more likely to move to butter if had to replace spreads,with younger cohorts more open to oils

If you had to replace dairy spreads with another type of spread, which type of spread would you be likely to purchase instead of dairy spreads?







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(Base: All dairy spreads monthly+ buyers n=437)

Bord Bia
Irish Food Board

Building an authentic story



53% of people would like to see details about farmers or producers on packaging

(Mintel, 2018)

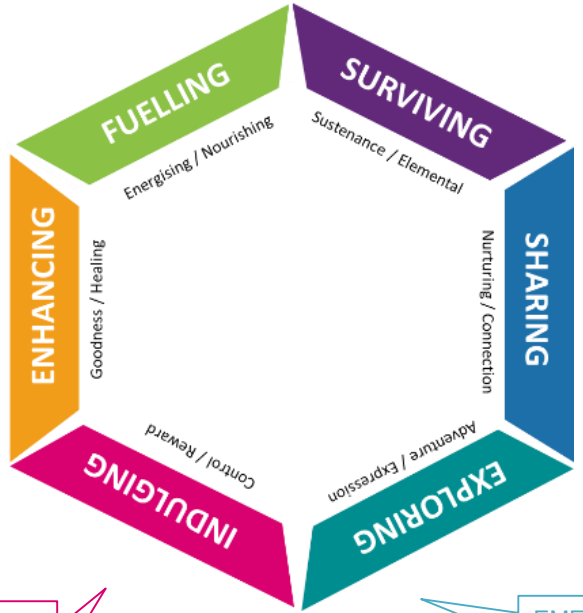
A holistic product story is more compelling



Brands that can be “for me” and “for planet” are more likely to make the difference

Understanding need states and where there is potential to play

More health focused spreads deliver most strongly to this need. As there are concerns around health and spreads and even butter, there is an opportunity both to educate and create products with added value ingredients.



CURRENT, Butter and dairy spreads sit here due to high calories, delicious taste, sense that it is not entirely 'necessary' as a food. Here butter needs to "celebrate" its indulgent cues and play to dairy heritage

EMERGING, may be some potential for us to play here through flavoured options and culinary occasions.

Consumption Usage

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Regular Occasion Usage

Butters & Spreads

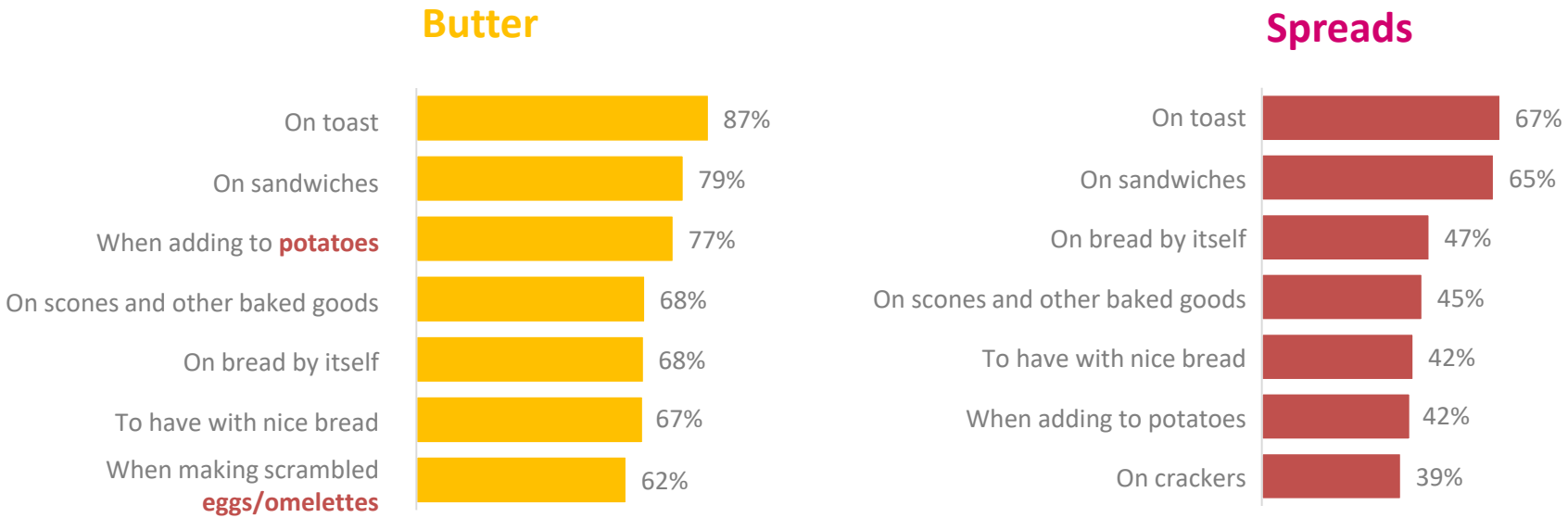


On the basis of claimed inclination to use more often, there Is an opportunity for butter to explore potential ways to tap into the various “snacking” occasions.

Overall butter has significantly more usages than spreads

(Base: All butter monthly+ buyers n=517/437)

And, how do you or other adults in your household regularly use butter/spreads in your household?



83% of people have their favourite way to eat butter



Butter raison d'etre

The ultimate enhancer



Rich and delicious

-On toast.
-With potatoes (baked/boiled/ mashed).
-Melted over vegetables

Primarily butter and dairy spreads but some margarine.

The 'cherry' on top of treats



Indulgent and comforting

-On scones, pancakes, bagels.

Primarily butter and dairy spreads but some margarine.

The moisture provider



Enhancing and appetising

-Sandwiches / wraps.
-Biscuits.

All products.

The cooking staple



Necessary and important

-Making eggs.
-Preparing sauces.
-Coating pasta.
-Ingredient for casseroles.

All products but ideally butter.

The baking basic



Homey and creative

-Staple ingredients for cakes, buns, biscuits, etc.

Mix of butter/margarine unsalted butter plays a role here.

“Thing is, butter’s not exactly necessary, but at the same time you wouldn’t want to live without it. What’s the point of toast or potatoes without butter?”

Older family Dunnes/Supervalu/Tesco shopper

“Sometimes it’s the simple things. Buttered digestives, cup of tea, absolute bliss.”

Younger family, Lidl/Aldi Shopper

“You’re probably using butter/spread most days without even realising it — scrambled eggs, making a white sauce, melting over veg.”

Empty-nester, Dunnes/Super Valu/Tesco shopper

“Brother Hubbard do the best butter, it’s flavoured with orange or something. Sometimes I’ll have a scone there purely for the butter.”

Younger family, Lidl/Aldi Shopper

Butter raison d'etre : *emerging*

High end accompaniment



Sophisticated and cheffy

-Flavoured butters for steaks/chicken.
-On a cheese board.

Primarily butter.

More sophisticated scratch cooker/ baking



Knowledgeable and skilled

-High end sauces.
-Soufflés.
-Pastry.

Primarily butter.



"I've made flavoured butters to serve with steak —chilli, garlic, that kind of thing. It's a nice touch if you have people over."

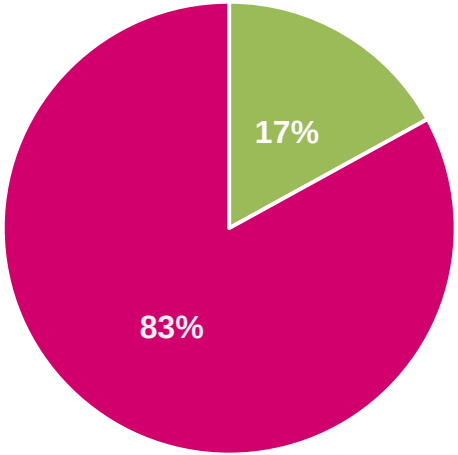
Older family Dunnes/ Supervalu/Tesco shopper

"If you can put One of those posh pats of butter on the table, that's really nice, it lifts the whole occasion."

Empty-nester, Dunnes/ SuperValu/Tesco shopper

Usage of flavoured butters or spreads is currently low perhaps they are not understood or given not being given a defined opportunity

Do you ever purchase flavoured butter or spreads?

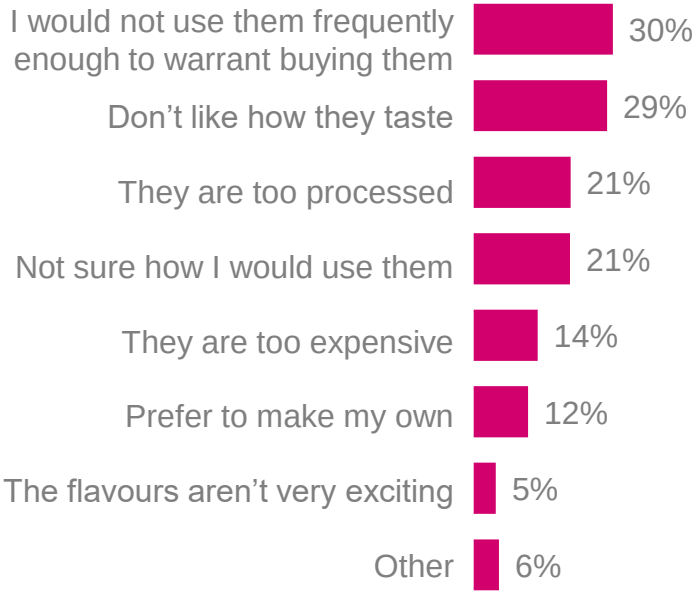


Yes

More likely to be light consumers and those aged 45-54

(Base: All butter monthly+ buyers n=517)

Why do you not ever purchase flavoured butter or spreads?



Eight steps to E.N.E.R.G.IS.E.

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E: Engage at the Shelf

Manage the sterile nature of the shelfing area

Bring more theatre to the shelf

How do we make butter interesting?

Can we tell the story of butter making?

Managing the size of shelf to ensure people can see new things



N: New Styles of Butter











Making the most of their investment the small start up ran a competition over the course of the three day festival inviting punters to 'create our next butter' – a genius ploy that attracted crowds like bees to eh, butter and surely went some way towards wooing the judges who awarded them 2nd place in the best dressed award category for their pod.

New flavours: sweet and savoury

New ways to blend butter at home

Invite people to create their own!

Think of new ways to appeal to the younger generations and the flavoured spreads/ butters they consume

Play to the virtues of fat

E: Enhance Usage Occasions







Remind people of how butter/spreads enhance various foods and enable them with recipes

Expand the repertoire or meal occasion to include afternoon snacks and evening meals and even drinks!

Consumers want “sure to succeed” solutions that make life easy!

R: Relevance for Todays Consumer

The rise of the vegan.

Speaking to the consumer of today!

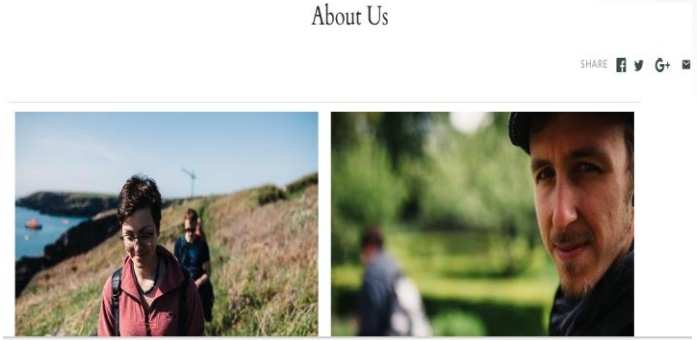
..Understand them first!

Consider the new contemporary food values

Consider products that address their needs

Give them recipes “hacks” short cuts to cooking with vegan spreads…

Consider the “oils” of the future
For eg HEMP







G: Goes With..



Make butter the hero



Celebrate it!
Don’t underplay it



Play it in lights!

I: Invent New Language & Packaging

Help people understand what they are getting..explain what they are buying..create new language

Introduce new colours, new wrapping, new butter shapes and vessels for different occasions- think outside the category

Consider the environmental impact

Consider easy to work with wrapping

Make more distinction within the category- more special editions..











I: Invent New Formats





https://crushcubes.com

S: Showcase Real Butter Stories





Tell a contemporary story, and in a contemporary way

Celebrate the heritage of butter making..tell them the “how to”..

Showcase the breeds..

Make people aware of what they are buying!

Smartlabel, Instagram, Pinterest, Facebook and Twitter logos

E: Educate the Health Virtues









Remind people of what makes butter good

Educate people particularly young people
As to the nutrient value of butter

Consider the opportunity for new health style products..probiotic, hemp, etc

Showcase how butter and spreads can play part of a role as part balanced diet – have some brand ambassadors: think protein milk!

Butter Compass

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CONVENIENCE
Toast
Toppers
New
Technology
HEALTH & WELLNESS
Plant
Preparations
Rewarding
Real
Culinary
Creations
HERO INGREDIENTS
New
Traditional
Animal
Emphasis
INDULGENCE
Flavour Fun

Indulgence: **Animal Emphasis**



Image source: High Lawn Farm



Image by Mintel on GNPD



Image source: St. Helen's Farm

Health & Wellness: Plant Preparations



Image by Mintel on GNPD

Indulgence: **Flavour Fun**



Image by Mintel on GNPD

Indulgence/Convenience: **Flavour Fun**



Image source: [Deli Market News]

Hero Ingredients: **Rewarding Real**

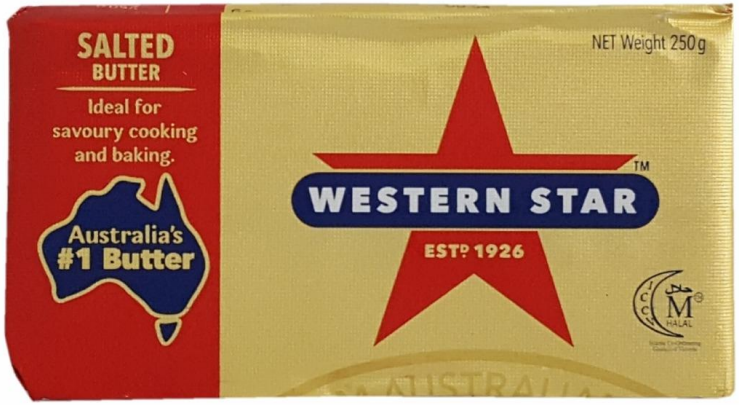

Image by Mintel on GNPD



GNPD Mintel

Image by Mintel on GNPD

Convenience: **Toast Toppers**



Image by Mary Harding

Convenience: **Toast Toppers**

Convenience in butter is about exploring product design formats that are appropriate for on-the-go and are focused on functionality. The below design project is a single use butter portion that has a multi-purpose knife-lid.

http://www.core77.com/posts/20328/core77-design-award-2011-butterbetter-student-runner-up-for-packaging-20328

Hero Ingredients: **Culinary Creations**



Image source: Ghee Easy



Image by Mintel on GNPD

Health & Wellness: **New Technology**



Image by Mintel on GNPD

Indulgence: **New Traditional**



Image source: [Packaging of the World]

Information is the foundation of all of our work here at the Thinking House. So, our way of working is to always put our good thinking in context and give credit where it's due. You can follow our train of thought in the references below.

References:

Kantar Worldpanel. (2018). *Bord Bia – Yellow Fats - Market Review*. Kantar.

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Questions?

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