

Consumer Insight



Growth through consumer understanding

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board



Opportunities in the Cakes & Pastries Category

November 2015

Introduction

As is evident from the following slides, the cake performance in both the Republic of Ireland and Great Britain (our main export market for cakes) is steady but flatlining. Cakes and pastries are facing intense competition from rival treat categories along with increasing private label dominance particularly in Great Britain.

Therefore we had two key objectives for this research project:

1. An understanding of the current situation – an analysis of the purchasing occasions for cakes and pastries and an overview of how consumer trends are impacting the category
2. How could consumers and shoppers needs evolve in relation to cakes and pastries over the next 5-10 years, and what opportunities and areas of innovation will this present to Irish manufacturers?

Research took place between July and September 2015, with both quantitative and qualitative methodology. Our research partner was Brand Potential.



In this deck, sections one to six are the summary of findings which were presented to industry. In the appendices are all the graphs in more detail.

For further information on this report please email info@bordbia.ie



Project scope and definitions

- Primary focus for the project is **Pre-packaged Sweet Baked Goods**.
- To size where cakes & pastries are undertrading required us to take a **broader look at sweet foods** which include breakfast style products such as cereal bars, fresh cookies, chilled yoghurts and desserts, ice cream and confectionery e.g. chocolate and sweets
- Objective is to establish if is there room for cakes & pastries broadly **to claim more share** of the overall consumer need in sweet foods.
- **Biscuits were not included** as they are a frequently consumed item (and often mindless rather than mindful) and would have dominated a lot of the sweet food occasions.



Contents of the report

1

Background & methodology

2

Category themes

3

Understanding the cake consumer

4

Consumer need states

5

Innovation and opportunities

6

Summary & takeaways

7

Appendices



Background & methodology

Consumer
Insight



Growth through consumer understanding

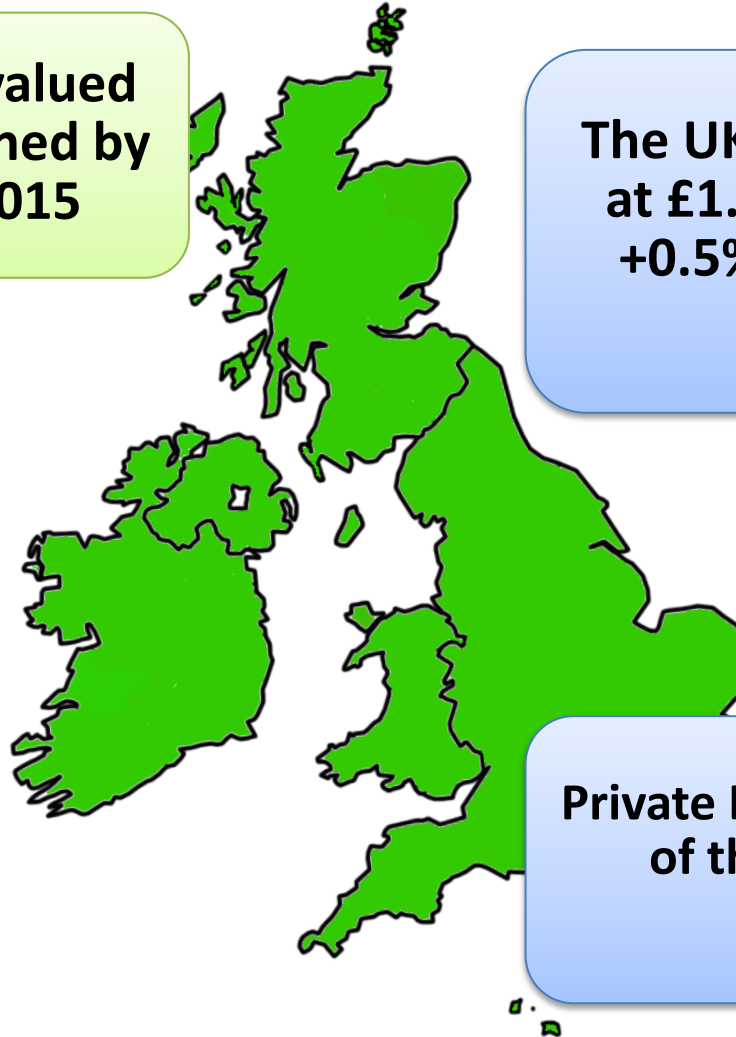
Cake & pastries market data

The RoI Market is valued at €110m and declined by 0.9% to 5th Jan 2015

The UK Market is valued at £1.8bn and grew by +0.5% to 1st February 2015

**While Spend per buyer is down
Frequency of Purchase has increased by 0.8%
and Volumes are up 3%**

Private Label accounts for 70% of the market and is in growth.





Ambient cakes account for 82% of the market but growth is behind ISB



In Store Bakery

18%

VALUE
£326m
+1.3%

VOLUME
349m Packs
+1.3%

Penetration

78%

Frequency

11.6

Trip Packs

1.5

Pack Price

£0.93



Ambient

82%

VALUE
£1.5bn
+0.3%

VOLUME
1.3bn Packs
-0.2%

Penetration

97%

Frequency

29.5

Trip Packs

1.6

Pack Price

£1.20

Slight increases in trip volume and pack price keep the market stable



%

Penetration

-0.2%



Frequency

-0.9%



Trip
Volume

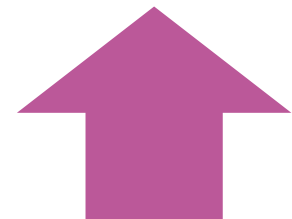
+0.3%



£

Price per
Pack

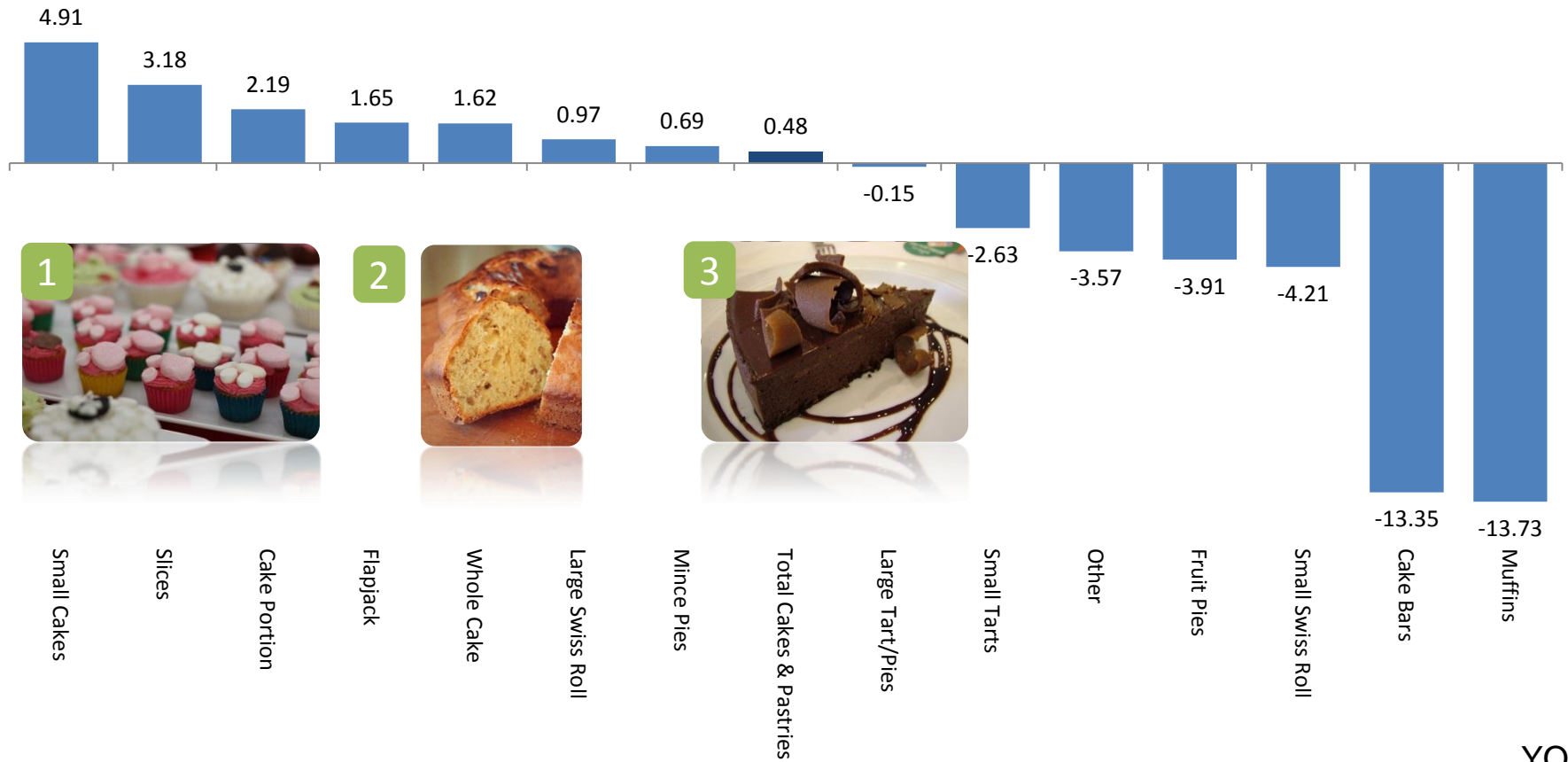
+0.4%



Source: Kantar

52 w/e data up to 1st February 2015

Muffins and cake bars see decline but other smaller formats grow ahead of the market



Source: Kantar

52 w/e data up to 1st February 2015

YOY %

Our methodology

Stage 1 Themes Landscape

Desk Research/Data
Review

Fringe Interviews
Stakeholder Interviews

July/August 2015

Stage 2 Insight & Opportunity Framework

Quantitative Study –
600 respondents (GB) reporting
on behaviours towards sweet
baked goods & their two last
sweet food occasions

Development of
Opportunity
Framework

August / September
2015

Stage 3 Innovation Opportunities

Qualitative Study –
2 x 3 hr co-creation sessions
with millennials and families
with young children to explore
needs and opportunities.

Half focus group to explore
shopping behaviours &
consumer need, half creative
ideation session. These groups
were hosted in Central Dublin
and West London

September 2015



Fringe Interviews



Fringe interviews

Kishore Budha	Annie Bell	Simon Parsons	Chris O'Neill	Melanie Southerden
Research Fellow, University of Leeds and Co-Founder, Semiofest Ltd. Kishore specialises in uncovering wider and deeper social meanings and generating lateral thinking for brands, translating it into clear and actionable recommendations for branded solutions. He has a special interest in the nature of indulgence in food.	Journalist and food writer, author and presenter. Ex-chef Annie worked with Vogue, The Independent, YOU magazine, Country Living, Waitrose Kitchen, Sainsbury's Magazine and Saturday Telegraph Magazine. Her skills in recipe development are widely used in foodservice and restaurant worlds. She specialises in baking.	Founder of Parsons Knows design and Creative Director at Brand Potential Simon is the bridge between insight and authentic brand ideas, a hybrid creative thinker and designer that stays true to strategy while delivering inspiring visuals. In demand as a driver of innovation, Simon assessed the draft platforms, taking them further and ensuring they were really delivering against underlying trends.	Developmental Chef Chris acts as an innovation consultant and workshop contributor. He recently moved from Spaghetti House's Head of Development to a Head of Menus role with an urban cocktail bar group as they expand from London to Europe.	Patisserie Designer Melanie combines commercial astuteness with a taste for the beauty of fashion and the precision of patisserie. She owns highly recommended London patisserie Southerden – GQ calls it 'the most fashionable bakery in Britain'. Melanie fuses fashions in food, science and design to create exquisite bakery, accessible to all in her London café.



+ 4x confidential interviews with Irish manufacturers

Who we spoke to

Quantitative

Nuts & bolts

- 25 minute online survey
- Designed & analysed by Brand Potential; panel & hosting by Instantly
- N=600
- Sample invited to Nat Rep proportions & geographical spread (UK), with minimum 50 respondents in each key age group
- Conducted in September 2015

Structure

- Screening & market sizing
- Attitudes to food, shopping and cooking
- Usage of sweet foods category
- Assessment of last 2x sweet food occasions (not biscuits) for the opportunity framework
- U&A of cake & sweet baked goods category
- Innovation platform appeal & relevancy

Qualitative : groups sample

ALL:

- BC1
- Shop for themselves and/or others
- Non-rejecters of pre-packaged cake category
- A spread of buying regularity within category
- Articulate and proven to be creative thinkers

5x Single Millennials

- 25-30, of independent means & accommodation

5x Co-habiting Young Family

- 35-45, with children between 3-12 at home

2x 3r co-creation sessions:

Half focus group to explore shopping behaviours & consumer need, half creative ideation session. These groups were hosted in Central Dublin and West London

Key concerns that cake manufacturers have around innovation

It is risky!

Private label relationships can be limiting

Interpreting and delivering on trends is complex



Consumer
Insight



Growth through consumer understanding

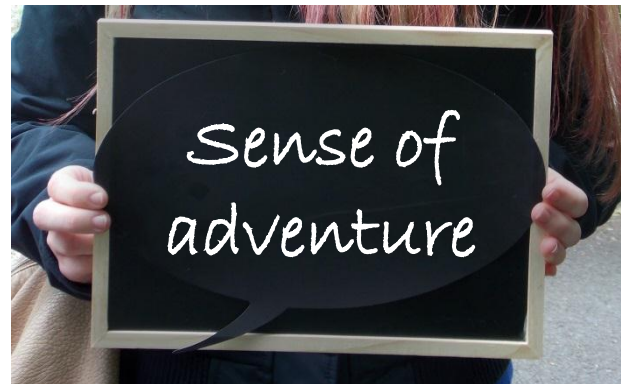


Consumer
Insight



Growth through consumer understanding

Seven key themes



A person with long reddish-brown hair, wearing a dark blue long-sleeved shirt, is holding a square wooden frame. Inside the frame is a black speech bubble shape. The text "Humour in food" is written in white, handwritten-style capital and lowercase letters inside the speech bubble. The person is holding the frame with both hands, and a portion of a brown leather bag is visible in the bottom left corner.

HUMOUR
in food

Humour in food

With people reassessing what 'value' really means to them after the recession, products need to deliver more at an emotive level for less cost. With many products offering so much information about them, we're seeing shoppers suffering from a type of 'browsing fatigue', so obvious emotional benefits need to be communicated as simply as possible. This is about food having a personality, novelty and a sense of humour. Not taking things too seriously and creating a bit of a talking/laughing point in social situations.

Insight: enhancing social currency, creating a sense of belonging, choosing humorous, fun food that puts a smile on peoples faces



Doughnut cake from Tesco – will the doughnuts all stay put??



Fontessiane
~ CAKE DESIGN ~

A person with long reddish-brown hair, wearing a dark blue jacket, is holding a square wooden frame. Inside the frame is a large black speech bubble shape. The word "Personalisation" is written in white, handwritten-style text across the middle of the speech bubble. The person is holding the frame with both hands, and a portion of a tan leather bag is visible at the bottom left.

Personalisation

Personalisation

Personalisation is deemed more 'valuable' to many, making it more aligned to their lifestyle, something a bit different and more of a talking point in social situations. Consumers wanting to personalise food specific to who they are and what they want.

Insight: consumers have higher expectations and expect brands / products to mould to their needs and lifestyles



Crayola cake



Handwriting your own cakes

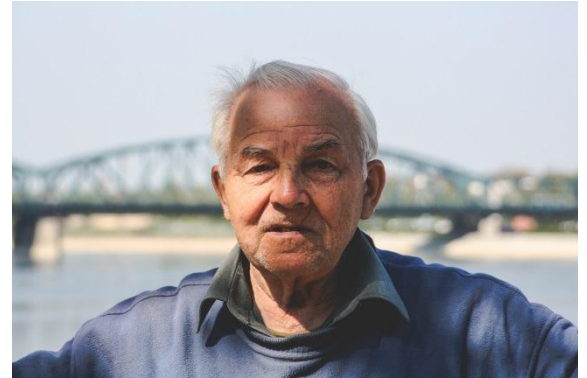
A person with long reddish-brown hair, wearing a dark blue long-sleeved shirt, is holding a square wooden frame. Inside the frame is a large black speech bubble. The words "Story Telling" are written in white, cursive script across the middle of the speech bubble. The person's hands are visible at the bottom corners of the frame, holding it steady. The background is a plain, light-colored wall.

Story Telling

Story telling

Consumers want an experience through food rather than just instant gratification, some people wanting to know more about food. Some are also using food and drink as a type of social currency, demonstrating their knowledge about what they're serving to others. Storytelling through food is about telling a story consumers want to share; this can be its origin, the traditions relating to it, its ingredients and so on. It's the combination of these touch points that tell much more of a story, rather than a single attribute on its own e.g. ancient grains used in cakes and bakery formats with local stories and heritage.

Insight: this is about a sense of escape through food but its also about mindful choices – consumers engaging with brands that tell a story, be that provenance, people, ingredient or heritage led



A person with long reddish-brown hair, wearing a dark blue long-sleeved shirt, is holding a square wooden frame. Inside the frame is a black speech bubble with a tail pointing towards the bottom left. The text "No compromise / Higher Expectations" is written in white, handwritten-style font inside the speech bubble. The person is holding the frame with both hands, and a portion of a tan leather bag is visible at the bottom left.

No compromise
/ Higher
Expectations

No compromise / higher expectations

A current growing trend is consumers expecting more from products and not having to compromise. They want to indulge but don't want it to be too unhealthy, and they also want natural 'real' food. A great example of this is managed portion control of highly indulgent cakes, so there is no loss of enjoyment but the scale of the product makes it permissible

Insight: being good but not missing out. we can have our cake and eat it, without too much guilt



Images from Georgia eats clean blog (chick pea & double chocolate brownies)
and Indy Power from Little Green spoons double choc brownie and creamy coconut bars

A person with long reddish-brown hair, wearing a dark blue jacket, is holding a square wooden frame. Inside the frame is a black speech bubble shape. The text "sense of adventure" is written in white, cursive script inside the speech bubble. The person is holding the frame with both hands, and a tan leather bag is visible on their left side. The background is a blurred outdoor setting.

sense of
adventure

Sense of adventure

Seeking experiences which allow consumers to escape the everyday monotony of life and utilise the basic human need for discovery. This is about using food as a form of **escapism**, exploring different senses and countries through the product experience. A great example of this is the trend for sweet and savoury dessert / cake experiences bringing in herbs and spices but also sweet and salt into different recipes.

Insight: similar to some of above; escape, higher expectations



Love Supreme Dublin – orange blossom carrot & thyme

A person with long reddish-brown hair, wearing a dark blue long-sleeved shirt, is holding a square wooden frame. Inside the frame is a large black speech bubble shape. The text "The New traditions" is written in white, handwritten-style font inside the speech bubble. The person is holding the frame with both hands, and a brown leather bag strap is visible on their left shoulder. The background is a blurred outdoor setting with a paved ground.

The New
traditions

The new traditions

Well known classic flavours/ products provide a sense of comfort and tradition, and so have stood the test of time. This is about identifying what will become the new classics and the new twists on the traditionals. It's about understanding how traditional can be constantly reinvented. These twists on traditions feel new, but are constantly needing to be reinvented to make them more relevant, for especially younger consumers: e.g. the salted caramel brownie (on trend flavours being injected into established classics), the cronut; the croissant / doughnut hybrid, now re-invented to be the Cruffin – the doughnut in a muffin style made with a secret sourdough mix...

Insight: consumers redefining new & real, redefining heritage. Brands that claim 'established in 1960' have less relevance today because new, exciting brands emerge on the internet that haven't been around for years. So this is about brands having to talk about heritage in a different way.

“Made to my mums recipe...”



“my favourite is chocolate cake and we have a recipe that has gone through the generations...”

“Apple tarts are my favourite and we have secret recipes...”



A person with long reddish-brown hair, wearing a dark blue long-sleeved shirt, is holding a square wooden frame. Inside the frame is a black speech bubble shape. The text "Good on the go" is written in white, casual, handwritten-style font inside the speech bubble. The person is also holding a tan leather bag. The background is a blurred outdoor setting with a grey paved surface.

Good
on the go

Good on the go

Our busy lifestyles lead to many of us eating on the go, whilst out and about. Products designed specifically for these times are in growth year on year and show no sign of slowing as our lives continue to switch from set meals, to more continuous grazing. Being part of meal deals are a great way to become relevant for these occasions.

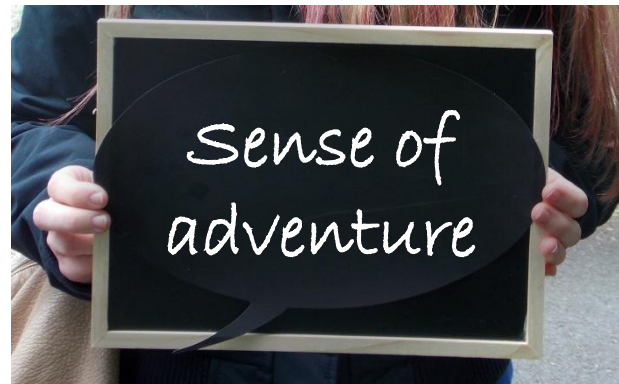
Insight: busy lives and also re-structured lives (household make up is very different today than even twenty years ago)



Source: <https://goo.gl/91lpxq>



Seven key themes



Are you delivering?



How do we eat our cake?

Consumer
Insight



Growth through consumer understanding

Who are the big cake consumers?

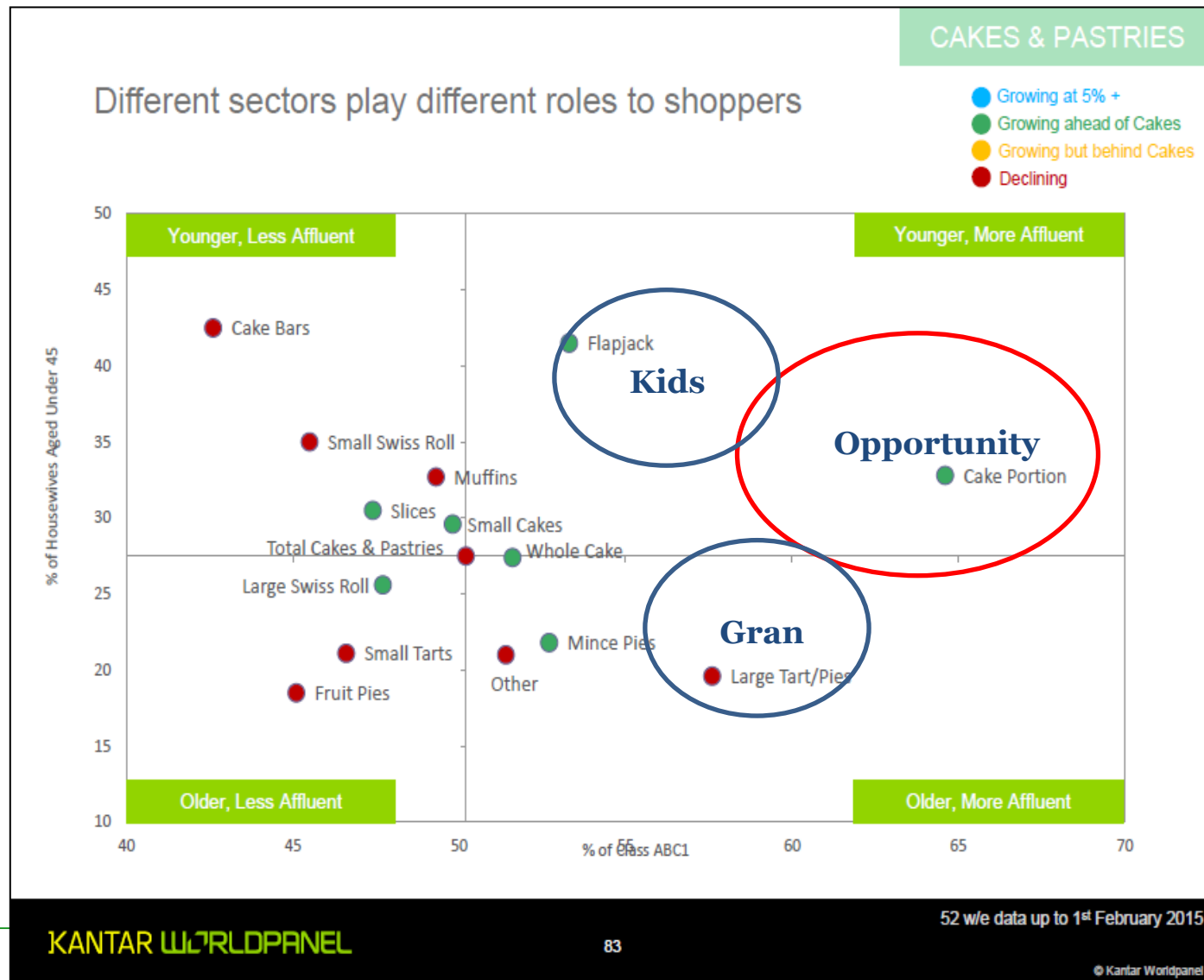


1 in 4 are 65+

9%



Packaged cakes seem more relevant for mum/granny or for children

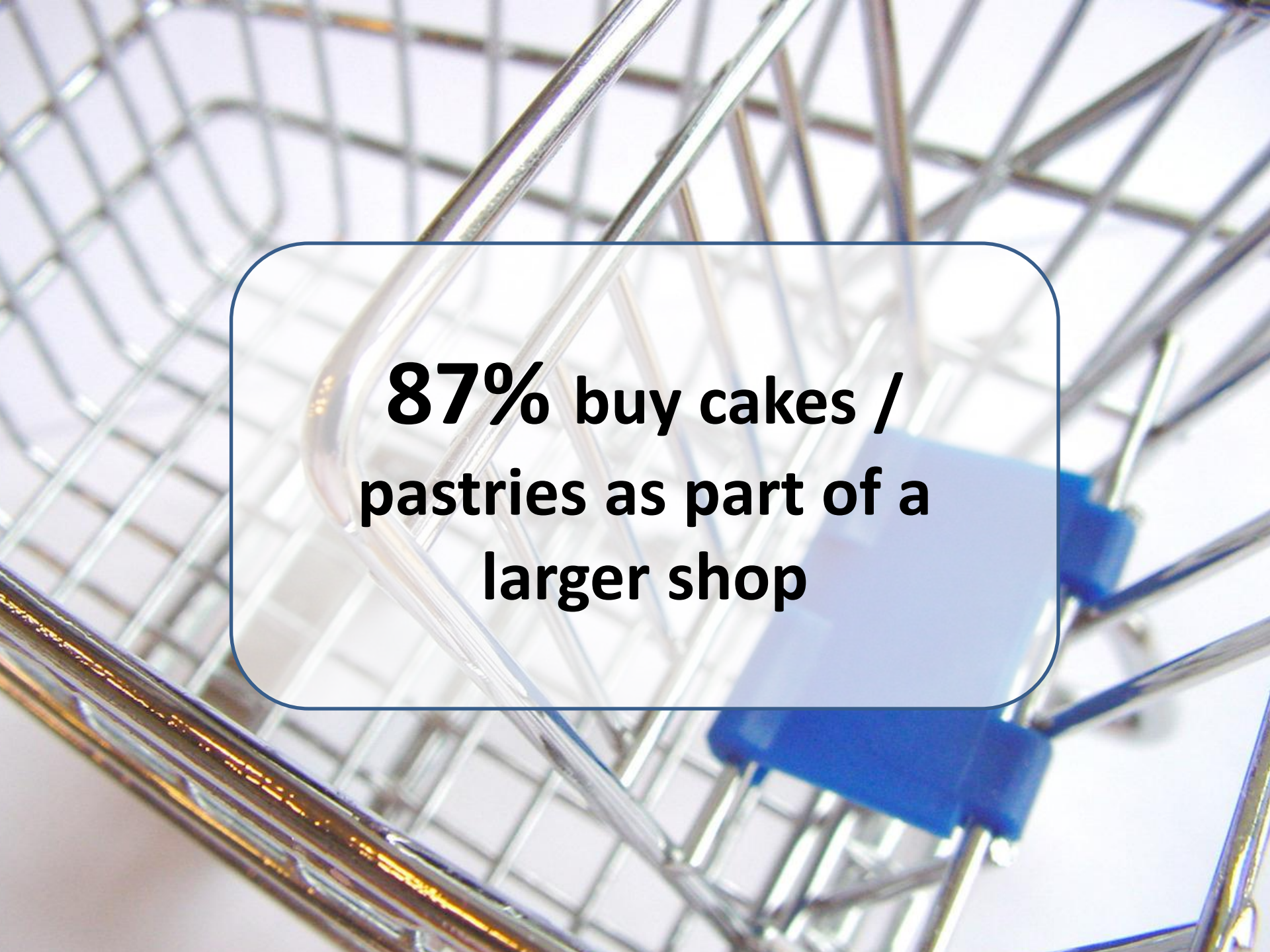


A close-up, low-angle shot of a metal shopping cart. The cart's frame is made of silver-colored metal bars, creating a grid-like pattern. A blue plastic handle is visible on the right side. Three overlapping circles are superimposed on the image: a large grey circle on the left, a white circle on the right, and a dark blue circle at the bottom center. Each circle contains text representing a market share percentage.

Main
supermarket
60%

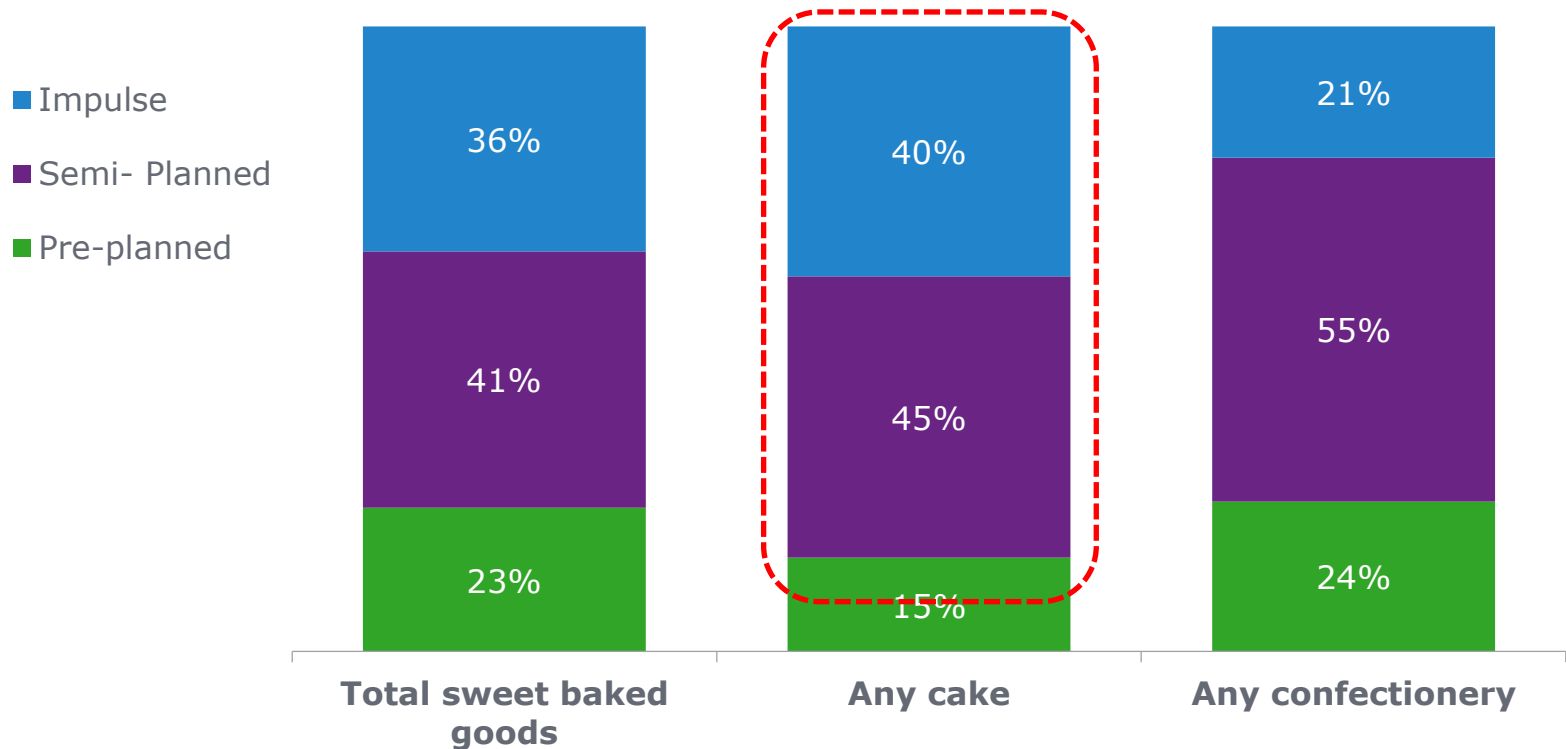
C store
14%

Bakery
10%

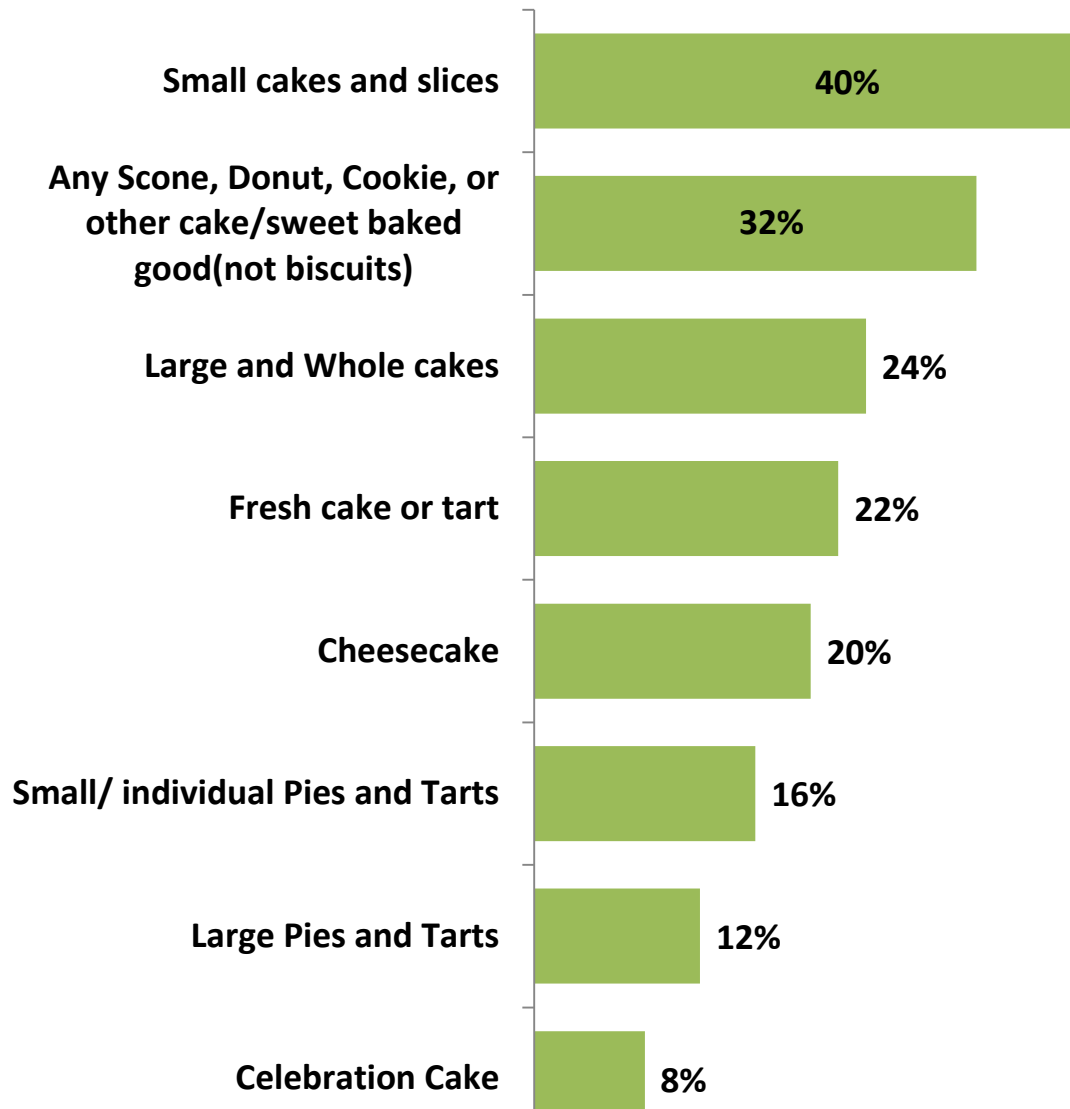


**87% buy cakes /
pastries as part of a
larger shop**

85% make decision at point of purchase



Most popular cakes and pastries



Occasions for cakes & pastries



6% Special
celebration

9% entire meal

10% social catch up

28% Top up / complete a meal

38% between meals i.e. snack

We are creating reasons to eat cake

A close-up photograph of a hand holding a silver fork with a slice of cake on it. The cake is a multi-layered cake with white frosting and dark layers. The background is blurred, showing a wooden surface and a glass. Three speech bubbles are overlaid on the image: a red one at the top right, a green one at the bottom left, and a dark blue one at the bottom right.

"I deserve it after a long day"

"It needs finishing, eating up"

"A small treat, don't have one every day !"

When is cake time?



66% of cakes are eaten
between mid day and
evening

1 in 4 cakes are eaten at the weekend,
with Wednesday (18%) being the most
popular day



72% of cakes eaten at home



84%
prepacked

Drivers of purchase for prepacked cakes

65% good value price and promotions

45% familiar

43% all natural

26% individually wrapped

26% low / no sugar

24% low calorie / low fat

23% look and design

7% gluten free

7% other allergens

BUT...

Category is a minefield for consumers



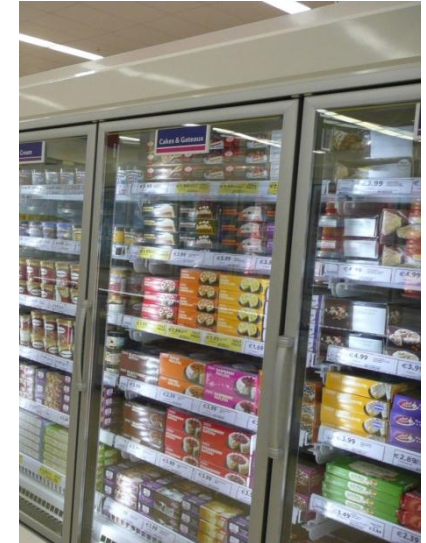
Fresh/ In-
store bakery
32%



Ambient 38%



Chiller 22%



Frozen 8%

*"I go and look at the bakery, then the chiller, then the shelves "
- male, 35*

Associations for fresh category (cakes)



Easy & simple
Reliable
Really delicious
Innovative

Perfect for entertaining
High quality ingredients

Ambient associations



Easy & simple

Convenient

Innovative

Everyday ordinary

Chilled associations



Easy & simple

Convenient & simple

Innovative

Overly sweet

Frozen associations



Easy & simple

Convenient

Really fresh

Innovative

Key reasons for increase and decrease in prepacked cakes

- Increased income
- Have kids now
- Retiring/more time at home
- On offer more than other categories

- Health / sugar / fat concerns
- Decreased income
- Access to fresh bakery/
baking more at home
- Tastes changing

Consumer
Insight



Growth through consumer understanding



Consumer
Insight

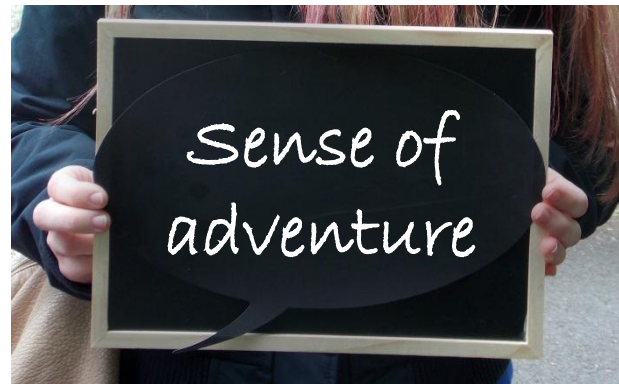


Growth through consumer understanding

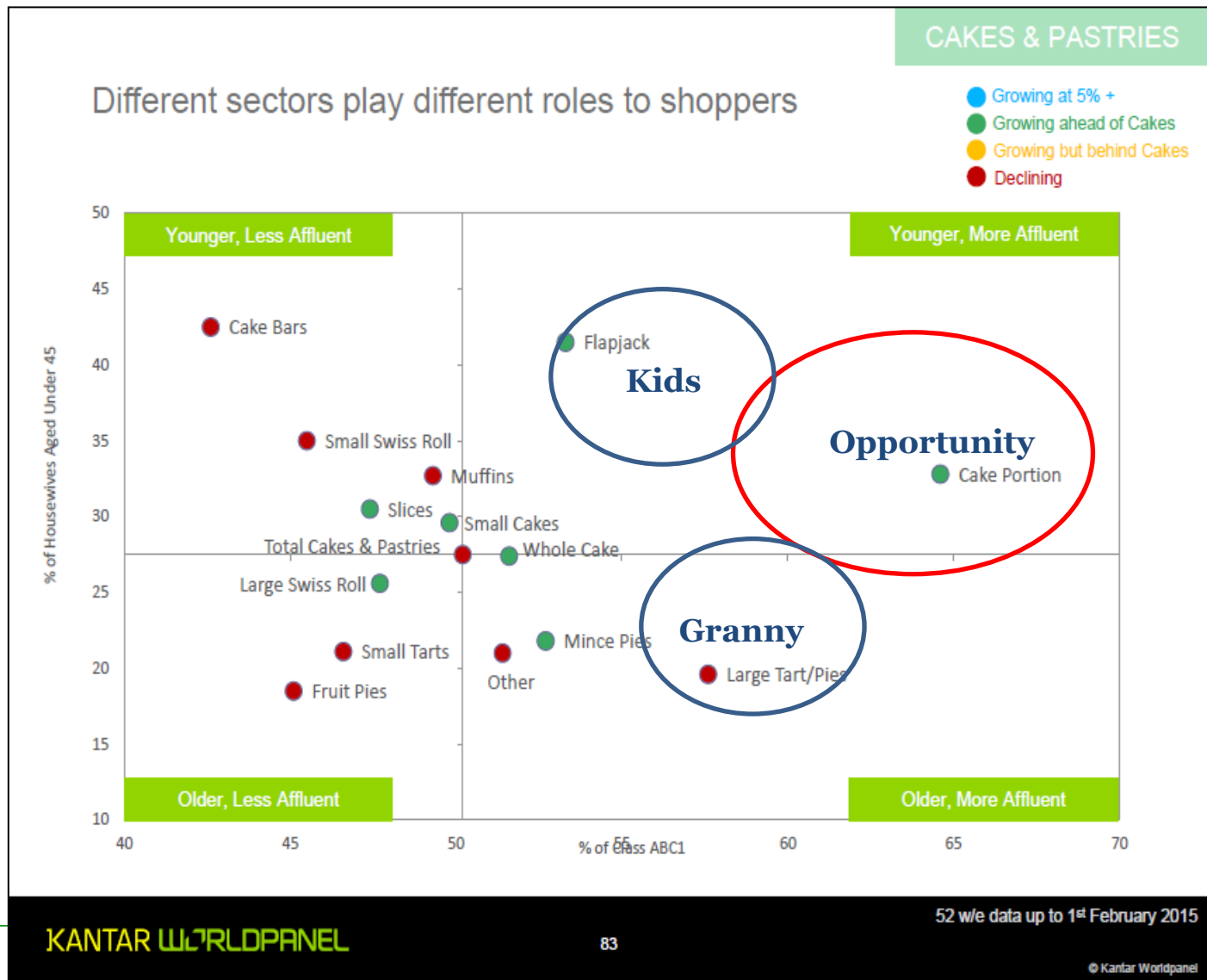
Celebrations, rooted in sociability and indulgence with lots of nostalgic links



Seven key themes



Packaged cakes seem more relevant for mum/granny or for children



Category is a minefield for consumers



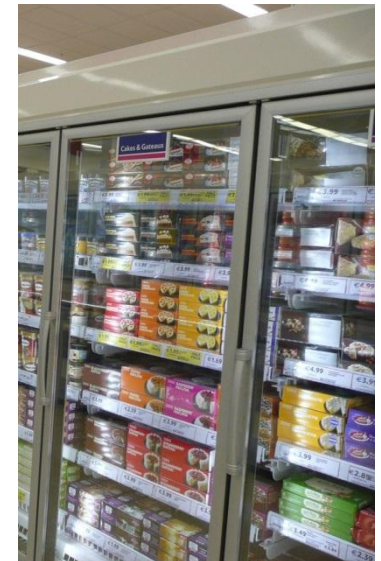
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Recap

Consumer Insight



Growth through consumer understanding

Agenda

1

Introduction and Background to Project

2

Category Themes

3

Understanding the cake consumer

4

Consumer need states

5

Innovation and opportunities

6

Summary & Takeaways



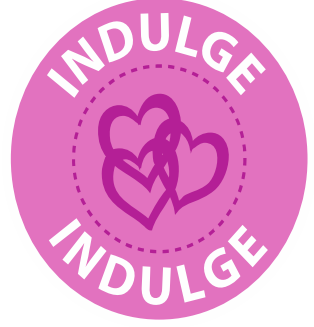
Consumer need states

Consumer
Insight



Growth through consumer understanding

Consumer need states for sweet foods category



Created & sized with cake purchasing & consuming in mind; validated by consumers

I want something *comforting* and familiar that can't go wrong



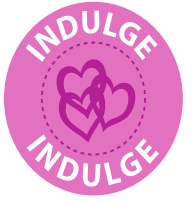
Chocolatey

Indulgent

Gooey

Crunchy

I really want something special I can *indulge* in



Chocolatey

Indulgent

Multidimensional

Flavours

Layered/Filled

Goosey, Moist, Saucy



I just want something I really fancy
not that special – a small *treat*



Light
Moist
Filled



I want something that will help me
share the moment with others



Filled
Layered
Textures

I need a pick me up, something to give me a little *boost*



- Substantial
- Multidimensional textures and flavours
- Nutty, oaty, grains,
- Healthier



I'm not even hungry I just want something to *nibble* on



- Chocolatey
- Tangy
- Chewy
- Crunchy

I need to satisfy my *hunger* and want something substantial



- Healthier, lower calories/sugar/fat
- Oats
- Crunchy, crispy



I want something *simple* and practical
that I don't need to worry about



- Substantial
- Fruity
- Natural
- Healthier

Sweet foods needs summary

Total 12%



Cake 10%

*I want something
comforting and familiar
that can't go wrong*

- Chocolatey
- Indulgent
- Goosey
- Crunchy

*I really want something
special I can indulge in*

- Chocolatey
- Indulgent
- Multidimensional Flavours
- Layered/Filled
- Goosey, Moist, Saucy

Total 14%



Cake 16%

Total 26%



Cake 25%

*I just want something I
really fancy but not
that special – a small
treat*

- Light
- Moist
- Filled

*I want something that
will help me share the
moment with others*

- Filled
- Layered
- Textures

Total 9%



Cake 11%

Sweet foods needs summary

Total 9%



Cake 9%

*I need a pick-me-up, so I want something to give me a little **boost***

- Substantial
- Multidimensional textures and flavours
- Nutty, oaty, grains,
- Healthier

*I'm not even hungry, I just want something to **nibble** on*

- Chocolatey
- Tangy
- Chewy
- Crunchy

Total 6%



Cake 5%

Total 8%



Cake 6%

*I need to satisfy my **hunger** so I want something **substantial***

- Healthier, lower calories/sugar/fat
- Oats
- Crunchy, crispy

*I want something **simple** and practical that I don't need to worry about*

- Substantial
- Fruity
- Natural
- Healthier

Total 15%



Cake 11%

Cake over indexes in its cultural home of indulge and share but underperforms in comfort, simple and hunger



Innovation and opportunity areas

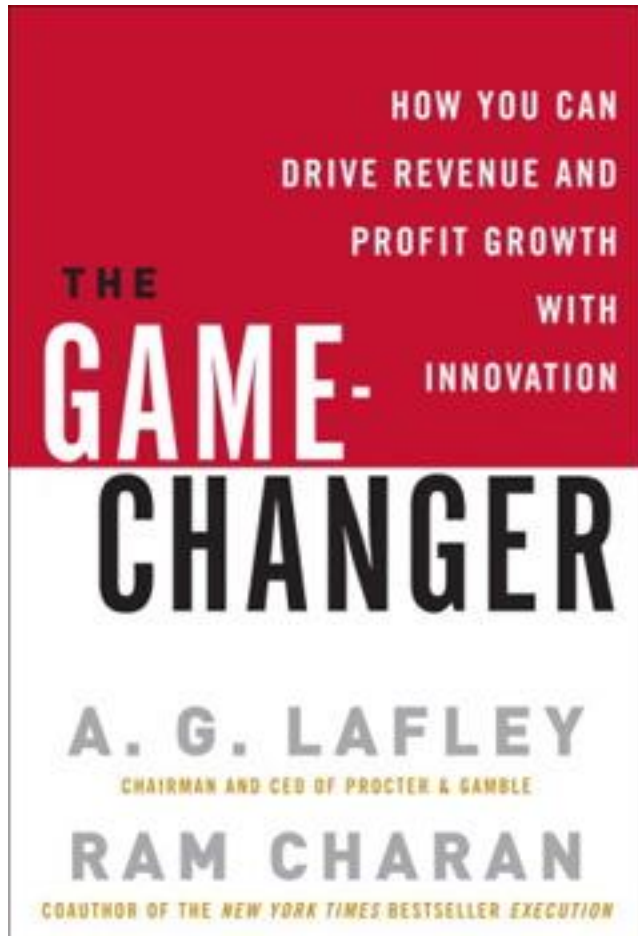
Consumer
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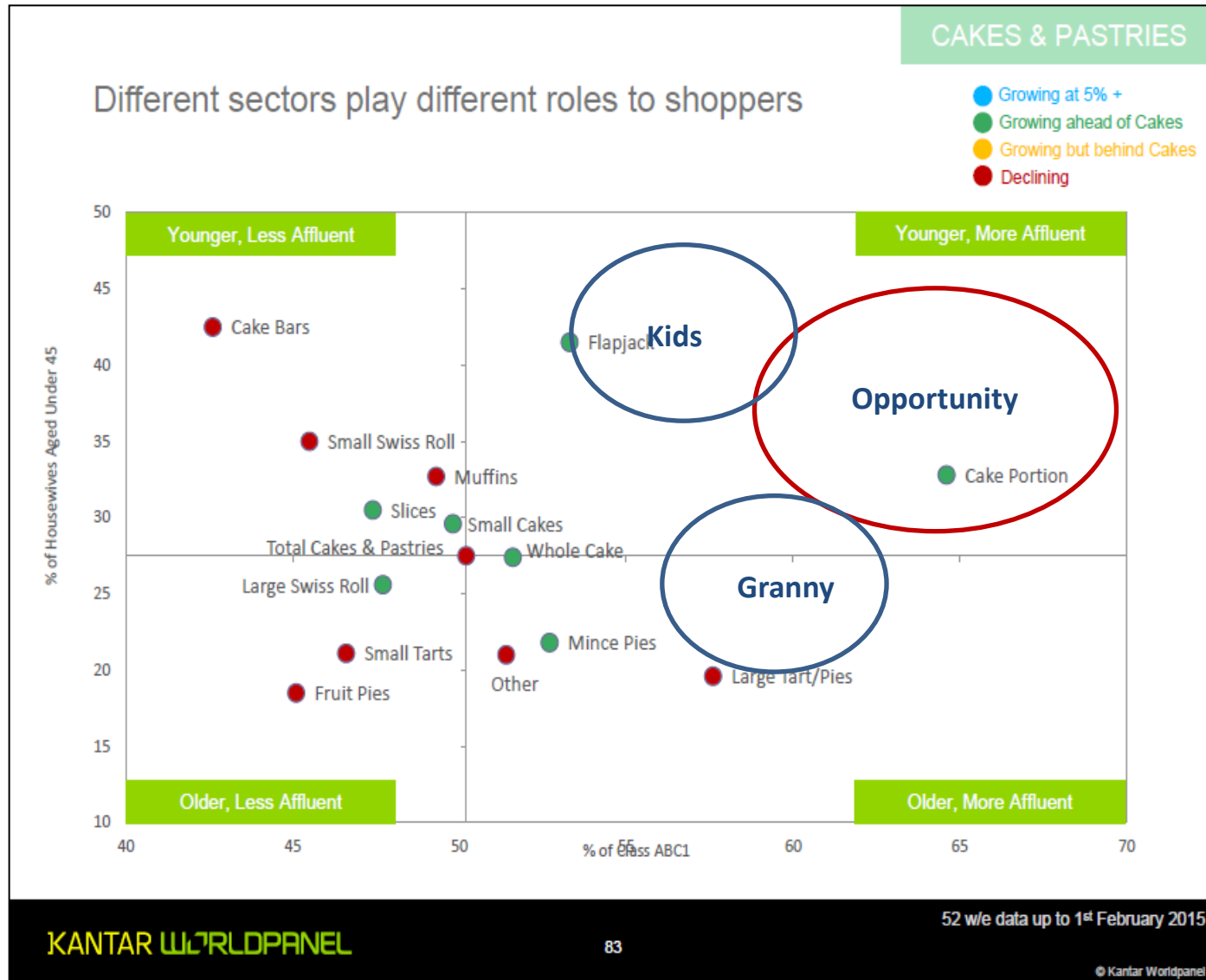
INNOVATION

or RENOVATION

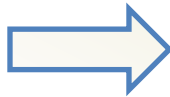
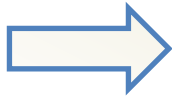
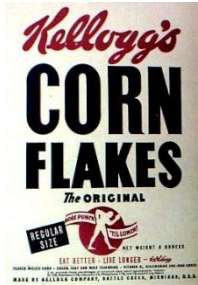


*“The key ingredient in innovation is ‘getting to know your **consumer**’”*

Packaged cakes more relevant for mother/granny or for children



Pre-packed cakes are lagging behind other categories that have innovated



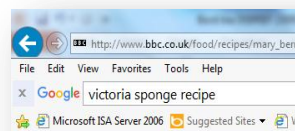
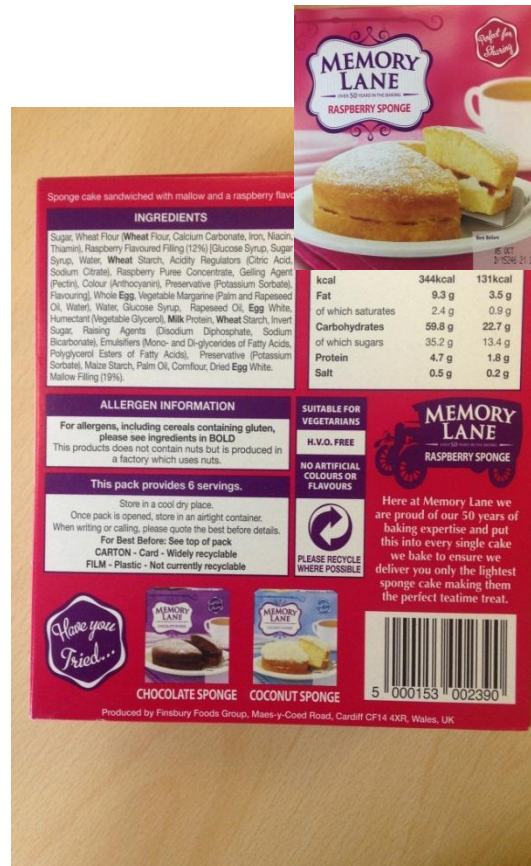
Closed packaging is a big barrier to relevance and occasions - a sense of hiding away?



There is somewhat of an evolution away from however



For some, mass produced ingredients lists are a concern, cake is just 4 or 5 ingredients isn't it?



Mary Berry's perfect Victoria sandwich

Home Recipes Chefs Programmes Ingredients Techniques FAQs

In Season Occasions Cuisines Dishes

Mary Berry's perfect Victoria sandwich

+ Add to Favourites

Quick recipe finder

Type ingredients, chef or programme

Quick & Easy Vegetarian

Advanced search options

By Mary Berry
From The Mary Berry Story

Less than 30 mins preparation time

10 to 30 mins cooking time

Makes 12 slices

Ingredients

- 4 free-range eggs
- 225g/8oz caster sugar, plus a little extra for dusting the finished cake
- 225g/8oz self-raising flour
- 2 tsp baking powder
- 225g/8oz baking spread, margarine or soft butter at room temperature, plus a little extra to grease the tins

To serve

364

Related recipes

Recipes for Victoria sponge

Orange and raspberry Victoria sponge
By Sophie Dahl

Victoria sponge with strawberry jam
By Lesley Waters

Mini Victoria sponge cakes
By Mary Berry

See more Victoria sponge recipes

Recipes using egg

Mary Berry recipes

10:31 30/09/2015

Other brands and categories have overcome ingredient concern – transparency key message

our ingredients



160ml 250ml 750ml



1/2 of a pressed apple



1/2 a mashed banana
(24%)



9 pressed red & white
grapes



a dash of lime juice



1/6 of a squeezed orange



4 1/2 crushed strawberries
(25%)

strawberries & bananas

How can a drink taste this good? Easy – just pop some strawberries and bananas into a bottle and drink it when it's nice and cold.

Bananas for thickness and sweetness, and strawberries for pretending to be posh – a winning combination. And that 'blush pink' goes very nicely with your lipstick. Say no more.

Also, we now make this recipe in our 'meal deal' size. It's a bit smaller, just as tasty, less than 90 calories and fits happily in handbags and back pockets.

- ✓ 2 of your 5 a day in every bottle or 250ml glass
- ✓ it gives you the goodness of 6 different types of fruit
- ✓ is a source of vitamin c

Like 2 Tweet 0 G+1

your reviews

● ● ● ● ● (629 reviews)

read the reviews

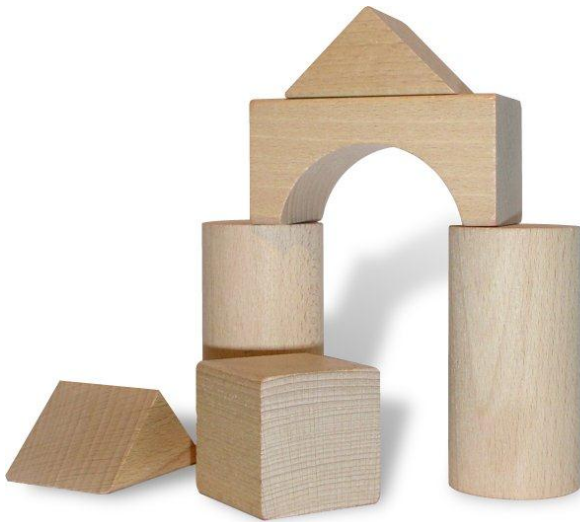
rate it

[a nice picture](#) | [ingredients](#) | [nutrition](#)



Deliciously simple!: Contains Dates (49%), Cashews (35%) Raisins (16%) and a hint of natural flavouring.

How to work with the opportunity areas



- These Opportunity Areas are the building blocks to support innovation
- They're not 'the answers' but they provide the tools and kit to help create the answers
- All have been created & validated against quantified opportunities for pre-packaged cake & pastries, and real consumer needs
- Some will deliver quicker wins: relevant for innovation now and should be possible for quick roll-out, some will require investing for 1-3 years into the future

connection



Have fun at a gathering
to make a connection with



• new traditions •



I love funnier foods that



♥ no compromise



good to go

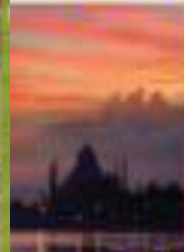


the perfect snack for you



☺ adventure!

I like a challenge.
I'm broadening my
horizons through new
flavours, new textures
and new products
whenever I can,
and I'm always out
looking for the next
sensation. I like food
that feeds my sense of
adventure!

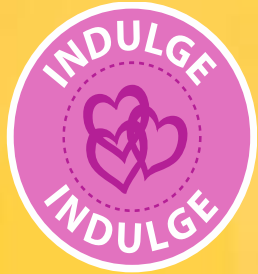


that new thing



Food can be a special way to make a connection with other people—something that lifts the moment into something more. Finding food with a sense of humour, a personal touch, special ingredients or exquisite artistry are all ways in which I can create a buzz with others, make them feel special and inspire conversations that draw us closer. I'm looking for food that helps that helps turn a moment into a memorable one.

CONSUMER NEEDS AND OCCASIONS



RULES OF ENGAGEMENT

PACKAGING

- Packaging that becomes part of the experience or solves a need
- And all-in-one solutions to help create a DIY/baked at home feel – a portable celebration
- Add-ins to box to create a wow, or talking-point
- Large-format cakes or sharing buckets



Product Attributes

- Accessible flavours
- Ability to put personal touches on – meets the desire for home-made
- Surprise insides
- Nostalgia & conversation starters
- Fashion
- Novelty / humour
- Filled / gooey / saucy / layered / crunchy

Attributes

connection

Show I've made an effort



Done it myself

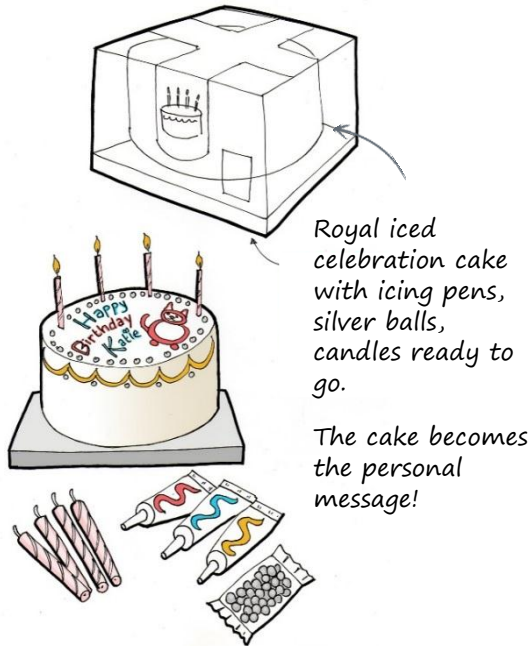
Novelty



Sharing

connection

Editable cake



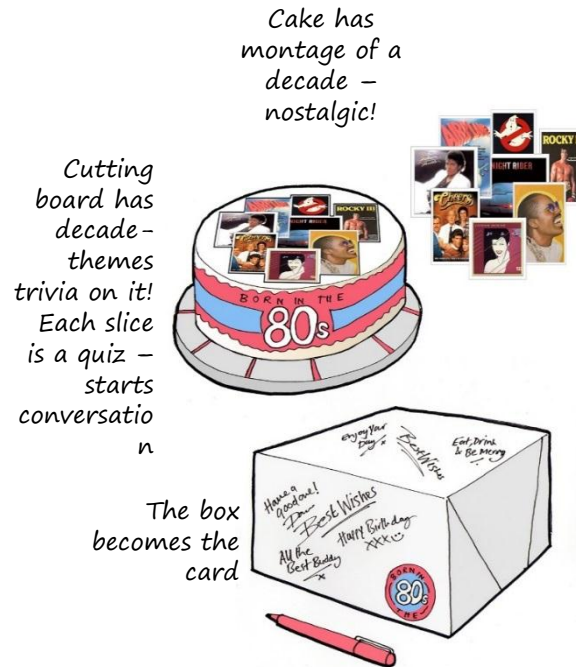
In a nutshell...

A kit containing everything you need for a celebration where a personal touch is important—it's a celebration you can take anywhere, without losing that home-made DIY touch.

Fit with platform

Connection between decorator and recipient, also between decorators
Potentially humorous or emotive
Premium

Cake card



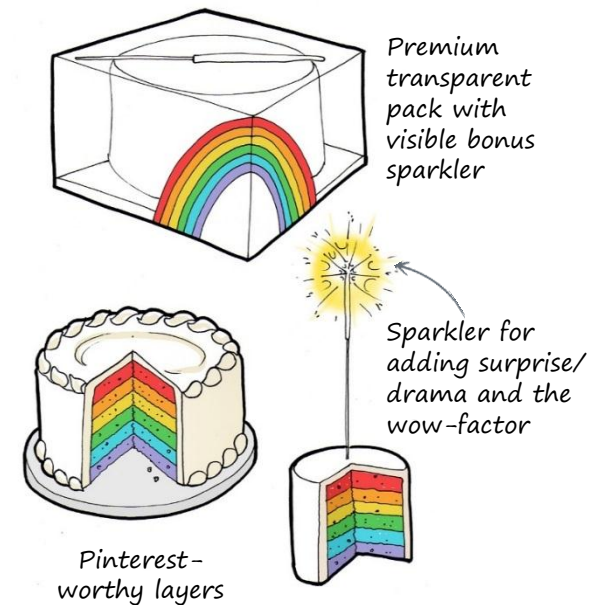
In a nutshell...

Combining two celebration needs: cake and cards, while still remaining relevant to many birthdays at once. Ideal for the work party, or where conversations starters may be needed.

Fit with platform

More generic connection, suits a wide range of people
Conversation starter, potentially humorous
Nostalgia

Rainbow



In a nutshell...

Taking advantage of current home baking trends, the rainbow cake's simplicity outside belies the excitement inside. Premium packaging hints at the surprise, and the excitement is the sparkler.

Fit with platform

Fashion/novelty
Premium
Wow factor / talking point



My life isn't static, and the days of sitting at the dining table for three regular meals a day are gone. There's no sign of it slowing down! I'm looking for food that make my busy life easier. Food I can eat easily whenever I am on the go, and food that gives me the boost I need to get things done... without compromising on flavour or quality.

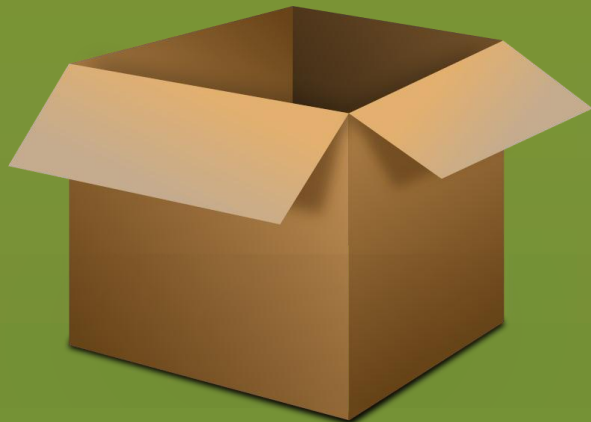
CONSUMER NEEDS AND OCCASIONS



RULES OF ENGAGEMENT

PACKAGING

- Packaging that aids consumption
- One-handed packaging
- Crumb-free
- Quiet packaging
- Larger, adult portions size (adults are under-catered for here)
- Substantial weight



Product Attributes

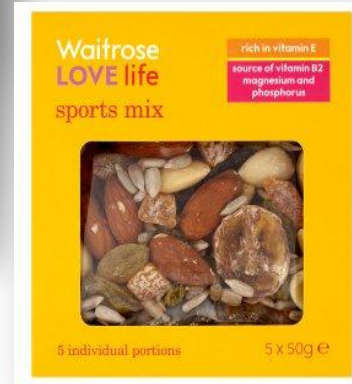
- Energy ingredients – nuts, seeds, fruits
- Ingredients that pair well with coffee and tea – slightly salty as well as sweet
- Moist food that holds together
- Moderately to very filling
- Food with bite, chew, so you acknowledge you've eaten it
- Crunchy / flaky / solid / crispy

Attributes

good to go



New formats to take
you into OTG occasions



Highlighting occasions on pack



Take anywhere & fill me up



Clever or
useful
packaging
solutions that
protect & aid
consumption

Easily transported

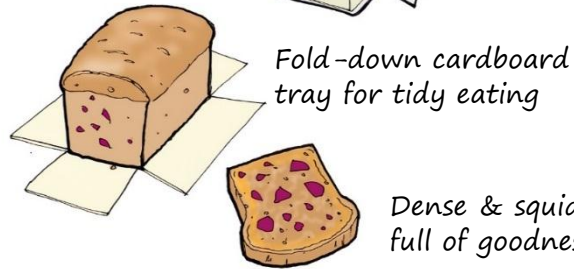
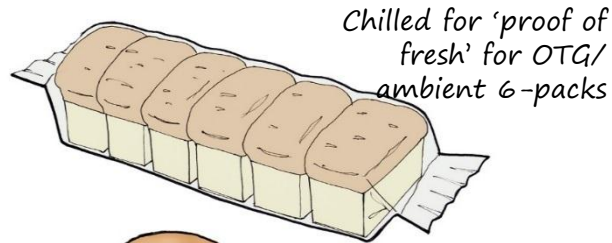


One-handed food



good to go

Lovely loaves



- Banana & cashew butter
- Courgette & lime
- Beetroot & berry
- Sweet spiced butternut squash

In a nutshell...

A Screen for grown-ups: texture, flavours and healthful energy-boosting ingredients, in a separating cardboard tray packaging that makes it easy to eat on the go.

Fit with platform

Substantial
Portion controlled
Simple clean eat
Energy ingredients

Satisfying Cereals

Quiet packaging technology: rip tab, slide, eat



Substantial, oaty flapjack cake, full of savoury-sweet seeds and goodness

Generous deep structure



Ideal for multipacks: the card sleeve and density keeps it safe from bag-squish

In a nutshell...

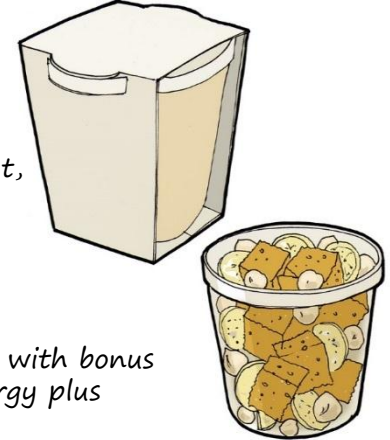
Eating snacks can be shaming and yet not satisfying: this on-the-go solution solves adult hunger needs while keeping consumption discreet and simple with easy-tear silent packaging.

TEXT

Filling a need in all cakes – adult
Substantial
Energy ingredients
Ideal for OTG or multipack

Mix it up

Dip in & out, reseal for later



Nuts, fruit, with bonus cake – energy plus treat!

Banoffee: Toffee cake/ hazelnuts/ banana chips
Tropical: White choc cake /dried mango / coconut
Bakewell: Almonds/ red berries /frangipani cake
Breaktime: Coffee cake/walnuts /dates
Trail: chocolate cake / peanut/ raisins

In a nutshell...

A resealable container pot containing 1-2 servings of cake, as well as classic cake ingredients separated out. For nibbling – dipping in and out throughout the day (like Graze).

TEXT

Fashionable format
Potentially uses otherwise wasted ends of cakes
Balanced snack



I love familiar foods that have been a regular feature in my life—but I don't want to eat the same thing all the time! I'm looking for new ways of enjoying my favourites, looking at my classic food choices in new ways to keep things fresh.

CONSUMER NEEDS AND OCCASIONS



RULES OF ENGAGEMENT

PACKAGING

- Giant or mini versions of favourites
- Pack should look like a modern upgrade: classics rebooted for a modern buyer
- Borrowing from other sweet food moments like chocolate
- DIY / help to make classic cakes



Product Attributes

- Not stretchy flavours
- Familiar enough
- Borrowing classic flavours from other categories – not just new versions of current cakes
- Flaky / Solid / crunchy / gooey / saucy / filled

Attributes

★ new traditions ★

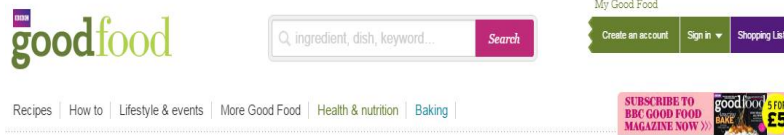
Giant versions



Borrowing flavours and putting into new formats.



Premium tweaks on old favourites



...or simply your own tweaks on old favourites



★ new traditions ★

Mini cake moment

Cakes that look like inlaid chocolates – one mouthful!

Strong flavour – two is enough.

Premium rich packaging borrowing from Hotel Chocolat, Gu and Cadbury



Existing formats would be fine too – e.g. square/ fondant fancies

In a nutshell...

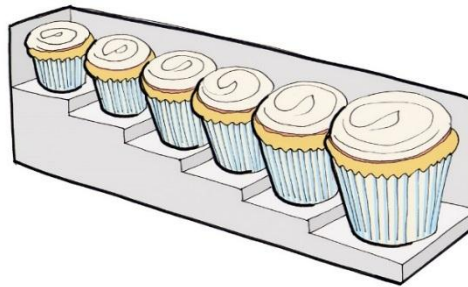
Borrowing from the classic after dinner chocolates moment, these cakes replace inlaid chocolate. The twist is the small format – but any shape would do.

Fit with platform

Borrowing from other traditions
Not stretchy flavours
Familiar format, with a cake twist

Family cupcakes

One for everyone, just the right size!.



Packaging optimised for shelf / merchandising

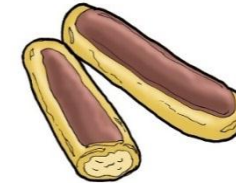
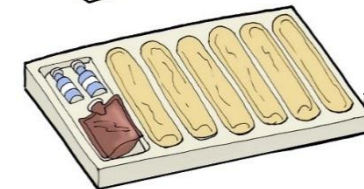
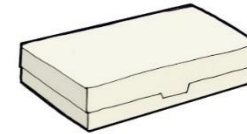
In a nutshell...

Graduating sized cakes: a tweak which makes a purchase simple and opens cake up to all members of the family through having just the right size.

Fit with platform

Just right 'for me'
Familiar format just tweaked
Attention-grabbing packaging

Choux for you



Kit comes with: choux eclairs or profiteroles, sauce and a cream flavours. Just buy cream, bake, whip and get piping!

Flavoured essence for adding to cream in coffee, dulce de leche, , booze, Nutella, raspberry, banana, mint

In a nutshell...

Frozen, ready to bake choux pastry in éclair or profiterole format, in a DIY kit. Just buy cream! A new creative way of connecting with a classic favourite.

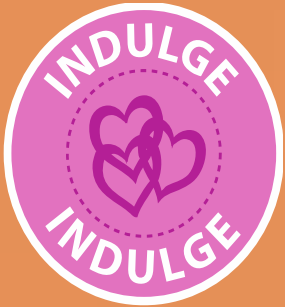
Fit with platform

Familiar favourite, tweaked
Concoct your own flavour cream



I like a challenge. I am broadening my horizons through new flavours, new textures and new products whenever I can, and I'm always out looking for the next sensation. I like food that **feeds my sense of adventure.**

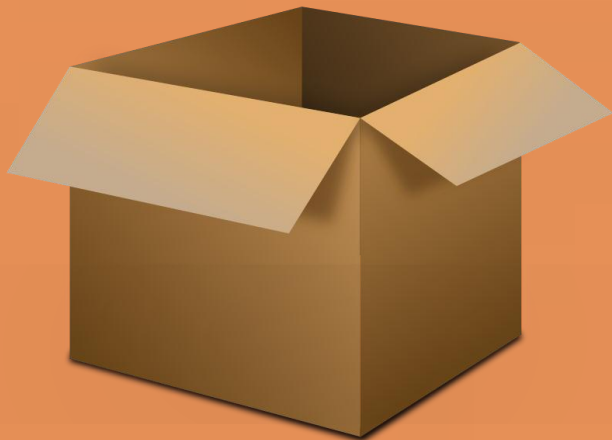
CONSUMER NEEDS AND OCCASIONS



RULES OF ENGAGEMENT

PACKAGING

- Premium packaging and design cues make risky or surprising flavours less intimidating
- Because some excitement/risk of flavour is present, transparency on pack is vital
- Small formats also alleviate risk factor and bring fun into the category



Product Attributes

- Authentic global flavours
- Strong flavours that pack a punch – zingy, bite, sour
- Distinct layers
- Textures – crunch, chew, bite, ooze – less tied to the classic formats
- Contradictory flavours e.g. savoury-sweet, spicy-sweet, savoury/sour/effervescent elements
- Saucy / gooey/ filled

Attributes

adventure!



Bold adventurous
flavours



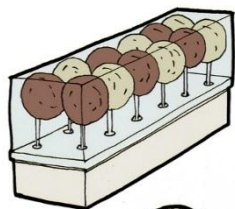
Premium packaging

On Patisserie
(Japanese and French
mash-up, complex
flavours)



adventure!

Cake pop roulette



Premium packaging, ready-to-go display tray



Mystery insides = conversation starters!

Darks: Chocolate chilli, Chocolate marmite, Nutty ganache
Whites: Coconut cream, Zingy lime and lemongrass, Freeze dried pomegranate & meringue

In a nutshell...

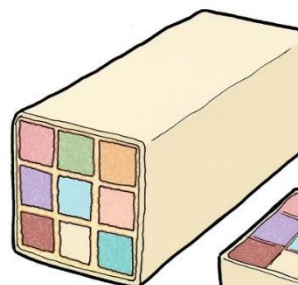
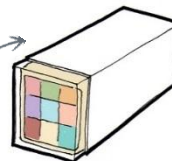
Small cakes on sticks, with a mixture of flavours that you cannot guess before you select. Some surprising flavour combinations combined with an element of danger, while staying low-risk due to portion size.

Fit with platform

Risk – elements of unknown
Adventurous flavours
New format for pre-packaged

Flavour Grid

Box has transparent end so you can see the flavour potential



Nine distinct flavours combined by buttercream & royal icing – eat separately or mix and match squares

In a nutshell...

Dialling up the classic Battenberg, and taking flavours to new levels. Each slice has nine flavours, designed to be consumed bite by bite – or mix and match colours for a cake cocktail!

Fit with platform

Juxtaposition of flavours
Elements of unknown
Ability to mix & match

Mash-ups

Premium indulgent packaging, suitable for gifting



Captures complex aromas and combats the lure of fresh bakery through scratch & sniff packaging.

Layers with texture



Carrot & orange, with ginger cream and cardamom cream on top with salted & spiced pistachio sprinkles

In a nutshell...

A premium, giftable product taking global, complex and contradictory flavours and combining them in one easy cupcake format. A heavily layered format makes the discovery happen layer by layer.

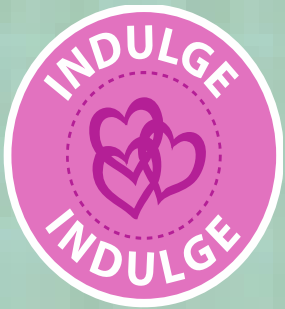
Fit with platform

Premium
Layered
Complex / contradictory
Goey



In today's world, I should be able to have it all. I love to **indulge**, but it's important to have an overall **sense of balance** in my food choices and lifestyle too. I don't need extremes, nothing over the top... but I **don't want to miss out on the best bits**.

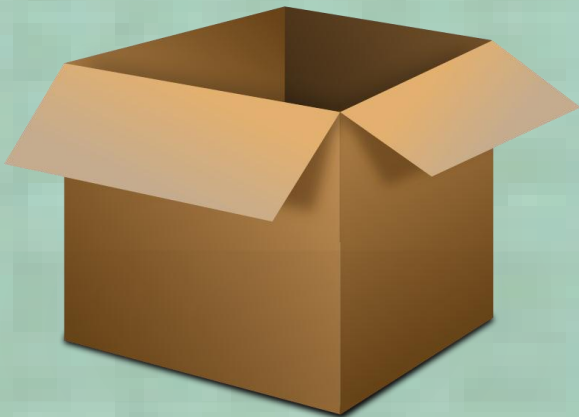
CONSUMER NEEDS AND OCCASIONS



RULES OF ENGAGEMENT

PACKAGING

- Individual portions
- Sharing sizes may have portion size indicators
- More oriented to chilled as proof of fresh ingredients / seen as healthier
- Clear health design cues featuring quick-recognise symbols: heart, free-from
- Ingredients on front of pack



Product Attributes

- Free-from / low calorie
- Fresh & dried fruit, nuts, seeds
- Alternative flours: rice, chickpea, almond, wheat, spelt
- Alternative sweeteners: honey, dates, maple, agave, 70% dark chocolate, liquorish/aniseed
- Alternatives to dairy/cream: coconut, rice, nut milks, butters & nut creams
- Added goodness: green powders, hidden vegetables, probiotics
- Substantial / crunchy / saucy

Attributes

♥ no compromise



Simple clear pack highlighting benefits & also no lack of flavour



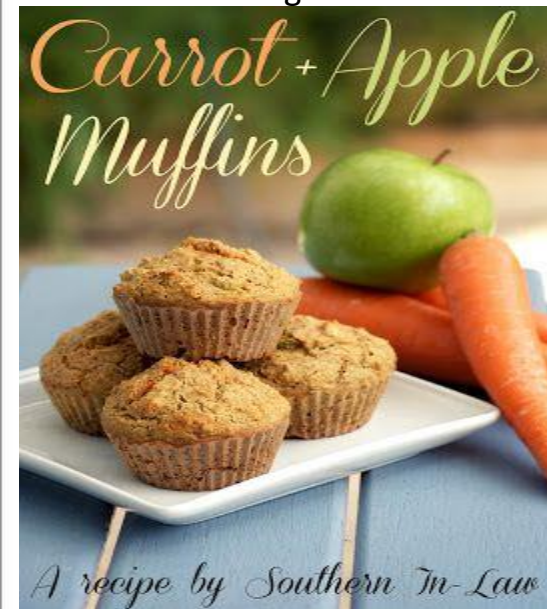
Still indulgent but healthier



Making aspirational / niche health products accessible

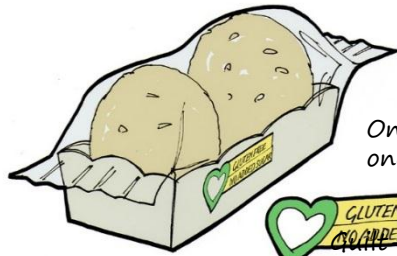


Replicating what's happening in healthy home cooking

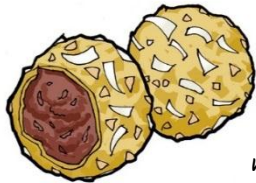


♥ no compromise

Chocolate boost balls



One for now,
one for later!



Dense, intense,
chocolate truffle
coated in coconut,
with added proteins

Flavours to
match with 70%
dark chocolate:
aniseed, mint,
carrot, coconut,
beetroot,
hazelnut, maple
pecan.

In a nutshell...

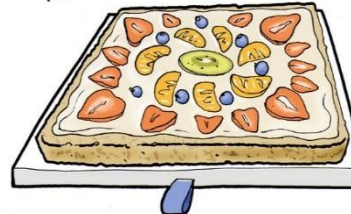
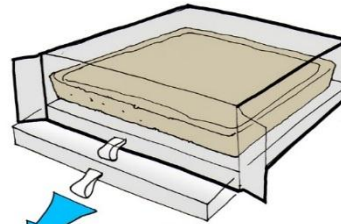
Taking all-natural and added protein to the everyday indulgent consumption occasion with baked truffles. An indulgent format made of healthier ingredients.

Fit with platform

Natural sweeteners & free-from
Portion control
Substantial, dense

Tart: 2.0

Delicate/light
t product –
packaging
with slide
out tray



Smothered in
berries and
almond or
cashew cream

Healthier base –
seeds, nuts,
potentially
vegetable based
like cauliflower
pizza base!

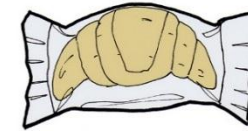
In a nutshell...

Reinventing the sharing tart, but in an innovative, accessible and healthy way. Alternative base e.g. seeds or vegetable base, smothered in berries and healthier cream options

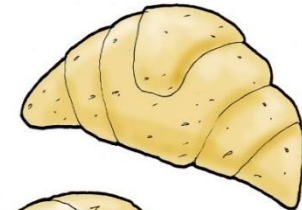
Fit with platform

Fresh fruit
Alternative creams
Alternative flours & sweeteners
Looks naughty

Stuffed croissant



Found individual &
ambient for on-the-
go but also in 4-
packs for family use



Classic filled croissant
– textures healthier
ingredients



banana, nut & cinnamon / dark chocolate,
seeds and dried fruit / berries, almond,
frangipani & coconut

In a nutshell...

A little bit naughty, with the croissant's buttery deliciousness. A lot nice, with the fillings generous, textured and flavourful ingredients – like baklava but with no syrupy guilt.

Fit with platform

Good balance of indulgence with health
Useful On The Go solution
Substantial/generous
Fresh fillings

How to work with the opportunities



Each opportunity is a kit of parts to be a source of inspiration and aid innovation in your business

So which do you think resonated the most?

connection

----- good to go -----

• new traditions •

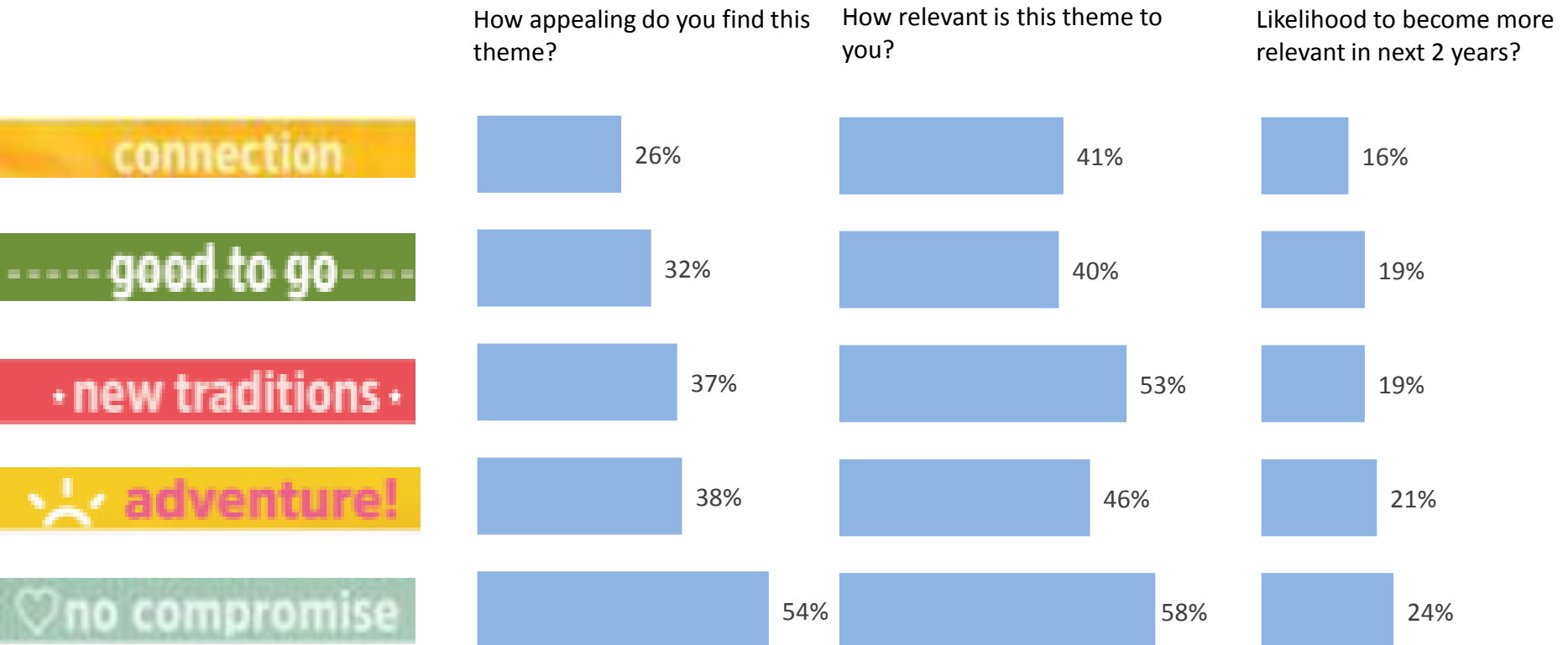


adventure!



no compromise

Leading us in to places that pre-packaged cakes have not gone before



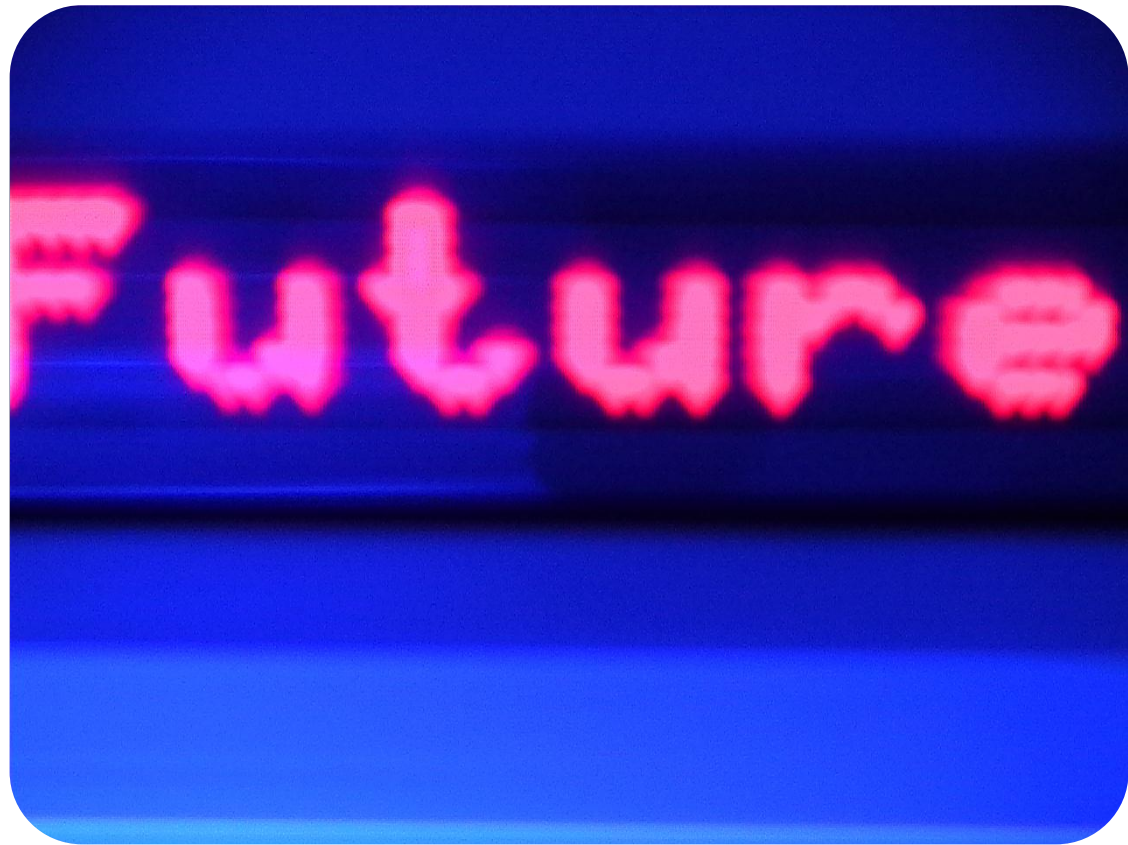
... driven by consumers' higher expectation in terms of tweaks & revolutions in flavour and health, these themes drive the most interest for the future

Summary and takeaways

Consumer Insight



Growth through consumer understanding



Celebrations, rooted in sociability and indulgence with lots of nostalgic links



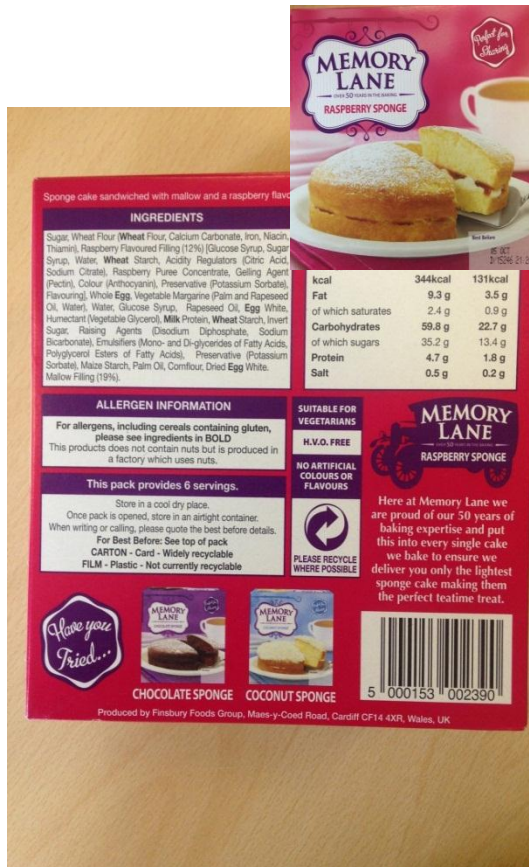
...but eating alone is okay too!



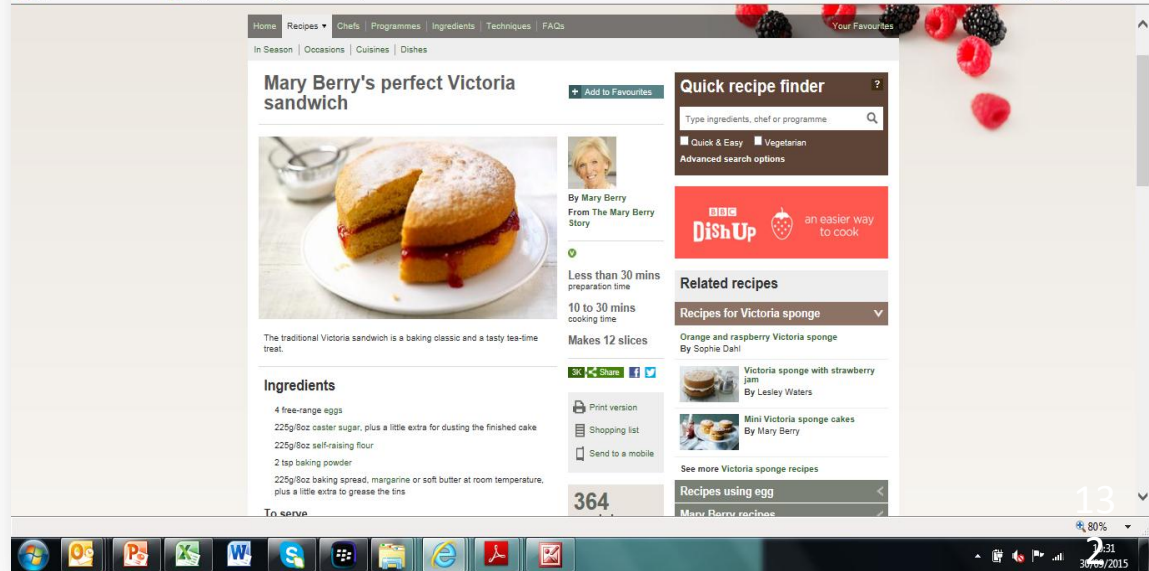
Attracting younger cohort through formats



Transparency is vital



Mary Berry's perfect Victoria sandwich



There are opportunities – it's up to you

connection

----- good to go -----

• new traditions •



adventure!



no compromise

Appendices

Consumer
Insight

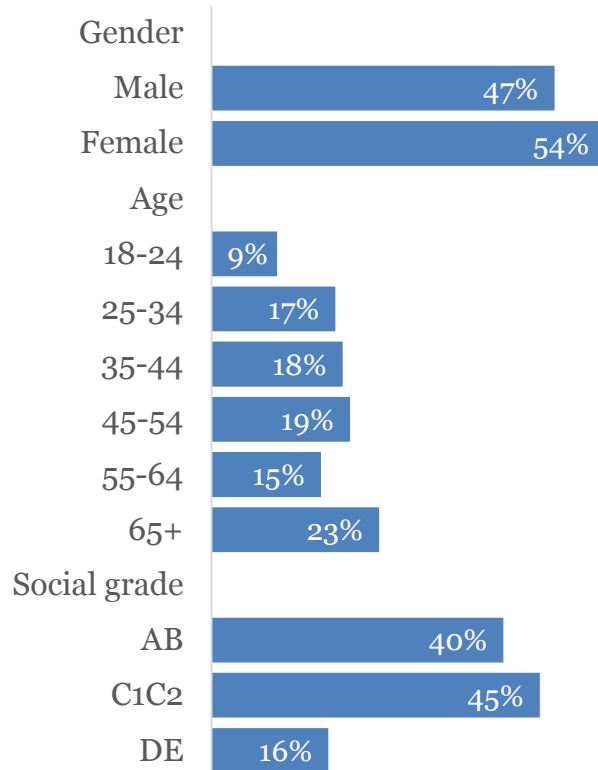


Growth through consumer understanding

Males are more likely to be regular consumers, with younger and older also driving regularity

Showing where cake buyers /consumers over & under index

*Total sweet foods
consumer sample*

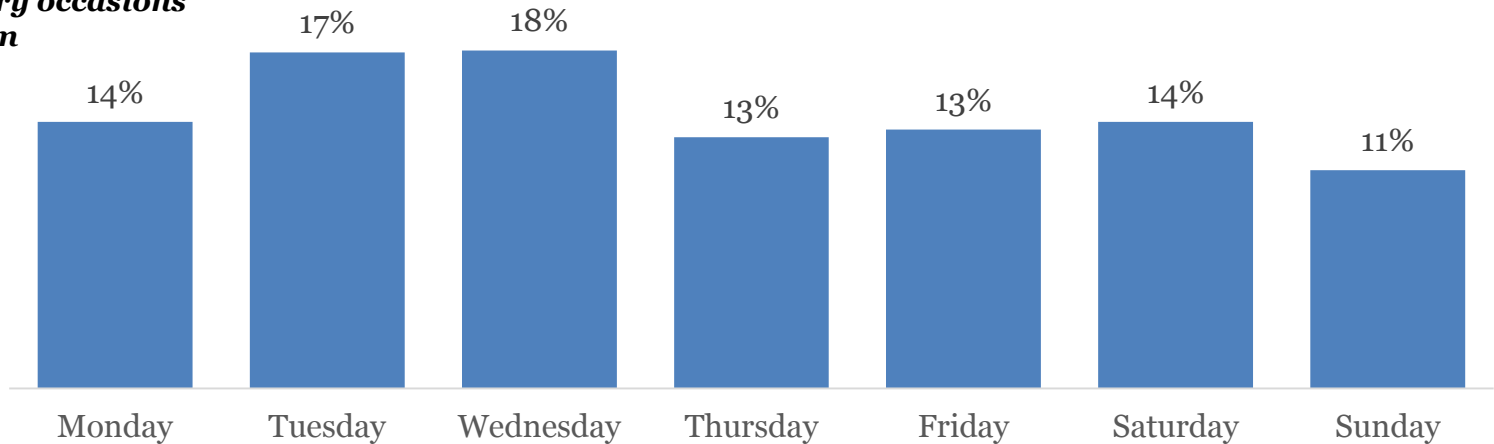


Cake & pastry buyers			Cake & pastry consumers		
Regular	Occasional	Rare	Regular	Occasional	Rare
1%	1%	-11%	-1%	1%	-8%
-2%	-2%	10%		-2%	7%
-1%	2%			2%	2%
	-2%	3%	-2%	-1%	0%
5%	-2%	4%		1%	2%
	1%	5%		2%	2%
-2%	1%	-5%	1%	-1%	-2%
-3%	-1%	-9%	1%	-4%	-4%
4%	0%	-2%	3%	1%	-3%
-2%	-2%	2%	-1%	-1%	3%
-3%	1%		-3%	-1%	



Day of the week – Wednesday is marginally ahead on pre-packaged

***Cake & pastry occasions
– when eaten***

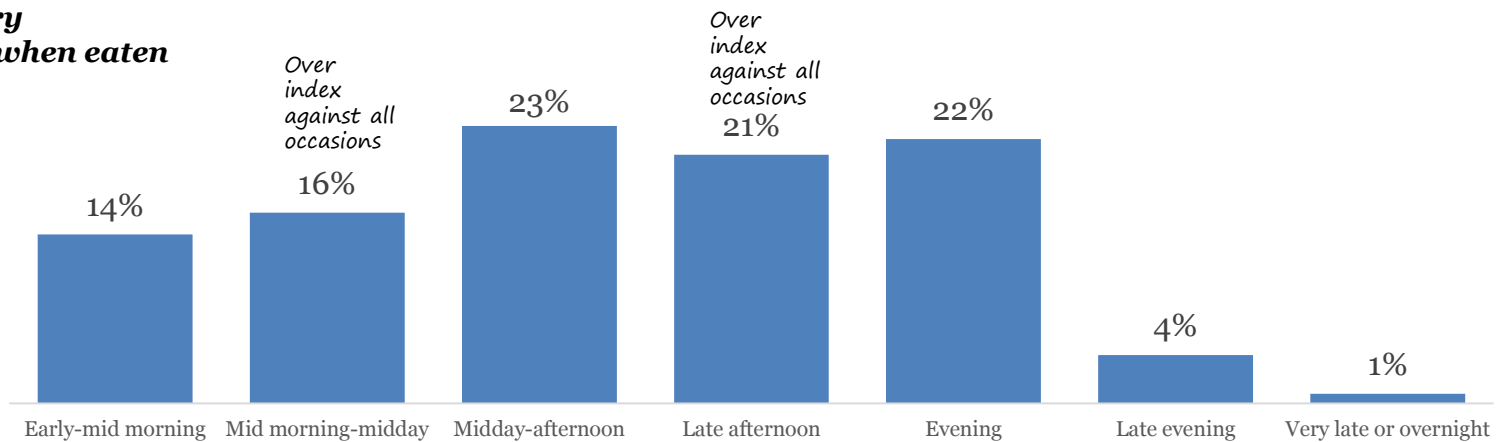


Chilled cake or pastry	14%	17%	18%	13%	13%	14%	11%
Frozen cake or pastry	13%	12%	21%	13%	15%	18%	10%
Ambient cake or pastry	18%	21%	15%	16%	7%	10%	13%
Pre-packaged, not individually wrapped cake or pastry	13%	19%	18%	13%	14%	13%	11%
Individually wrapped cake or pastry	11%	16%	18%	12%	15%	14%	14%



Time of day – cakes & pastries in general shine in mid-morning & mid afternoon, but chilled & frozen in particular later in day

Cake & pastry occasions – when eaten

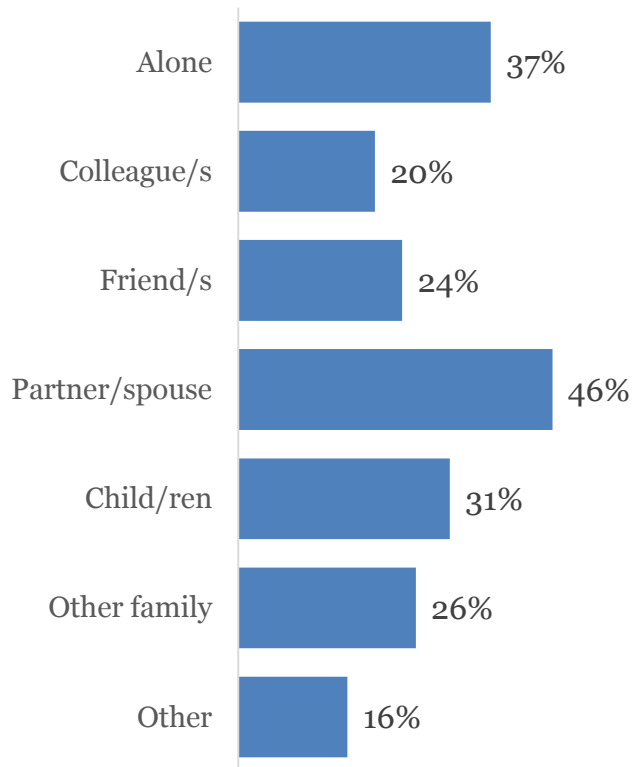


Chilled cake or pastry	7%	13%	21%	26%	30%	3%	0%
Frozen cake or pastry	10%	12%	21%	28%	26%	2%	2%
Ambient cake or pastry	16%	18%	25%	18%	19%	4%	1%
Pre-packaged, not individually wrapped cake or pastry	13%	14%	23%	20%	25%	4%	1%
Individually wrapped cake or pastry	12%	18%	22%	24%	19%	4%	1%



All cake & pastry moments are more social on average than non-cake & pastry moments! But chilled & frozen cakes are even more likely to be consumed with others

Cake & pastry occasions – eaten with



cake occasions over index in being eaten with all others, when compared against all sweet food occasions

Chilled cake or pastry	Frozen cake or pastry	Ambient cake or pastry	Pre-packaged, not individually wrapped	Individually wrapped
30%	33%	38%	36%	41%
24%	25%	19%	19%	20%
28%	25%	24%	22%	23%
54%	56%	44%	48%	41%
37%	34%	29%	32%	33%
29%	28%	26%	27%	23%
17%	16%	17%	17%	14%

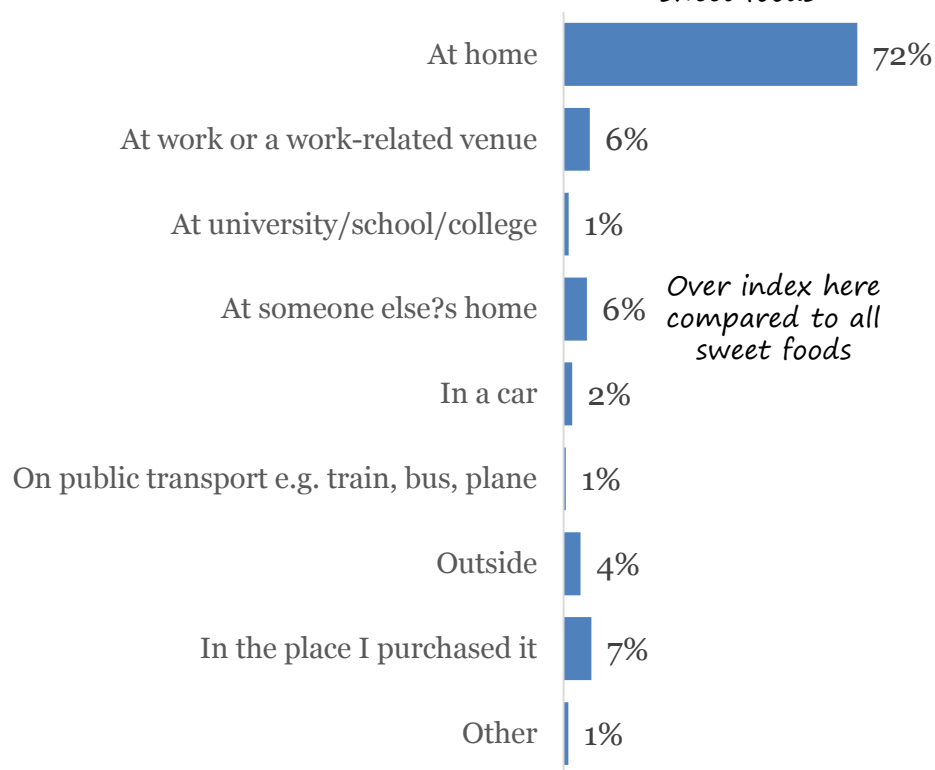


Where do we eat cakes

Cake & pastry occasions – where eaten

Under index in home occasion compared to all sweet foods

Over index here compared to all sweet foods

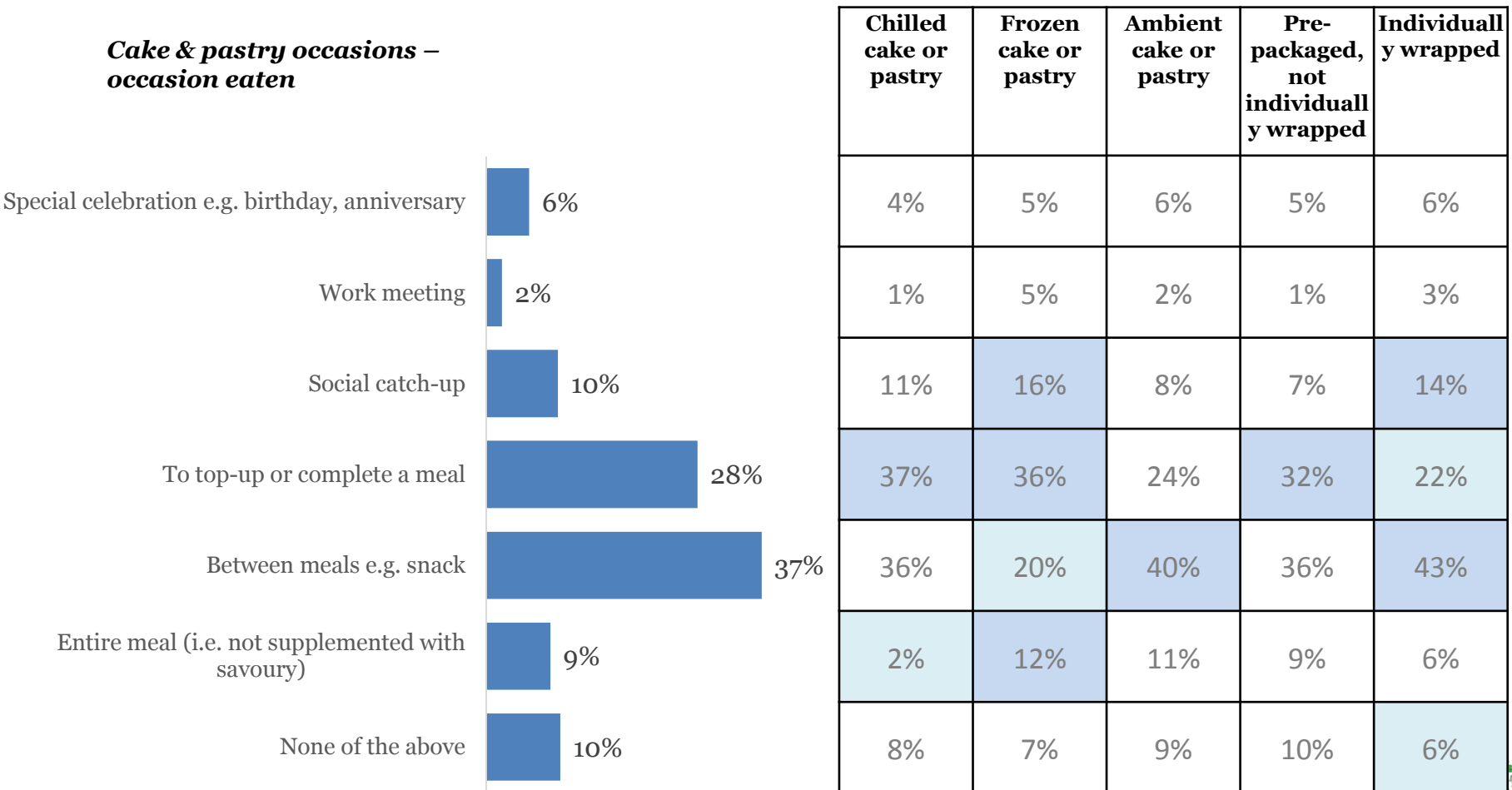


Chilled cake or pastry	Frozen cake or pastry	Ambient cake or pastry	Pre-packaged, not individually wrapped	Individually wrapped
73%	64%	73%	84%	60%
2%	5%	8%	5%	6%
2%	5%	1%	1%	1%
4%	13%	5%	4%	10%
2%	3%	2%	1%	5%
0%	2%	1%	1%	2%
7%	5%	3%	2%	9%
9%	3%	6%	1%	8%
0%	0%	2%	1%	0%



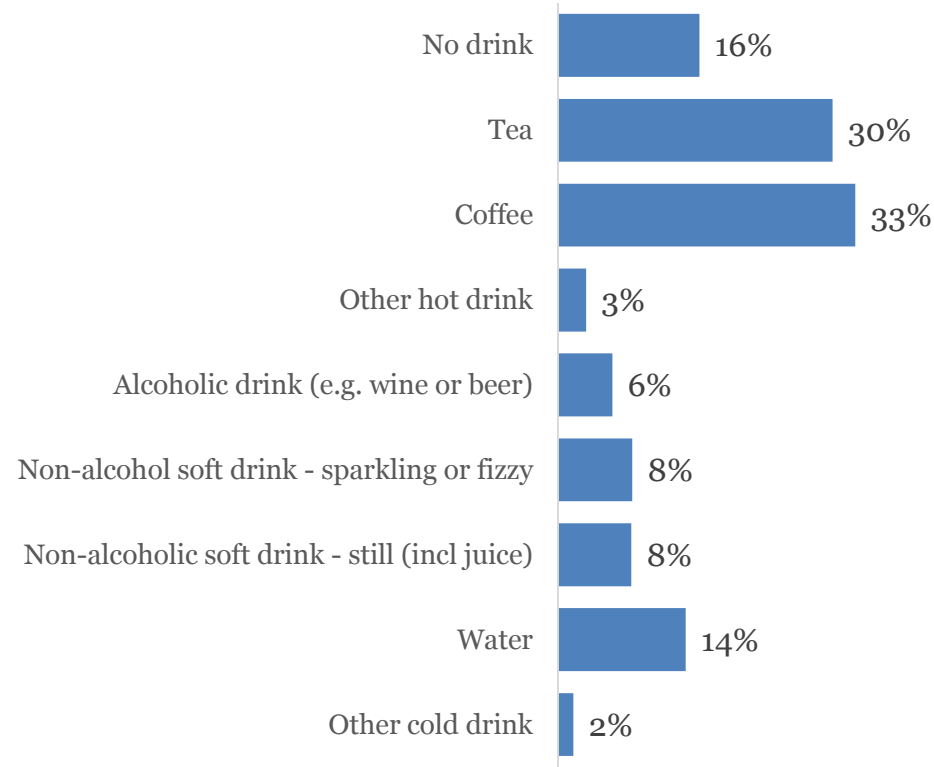
Again, cakes over index on social catch ups, which ambient and individual serves for snacking use

Cake & pastry occasions – occasion eaten



Hot drinks most likely with cakes, but frozen cakes also inspire drink pairing (usually at home – often for celebrations or dessert)

Cake & pastry occasions – beverage eaten with

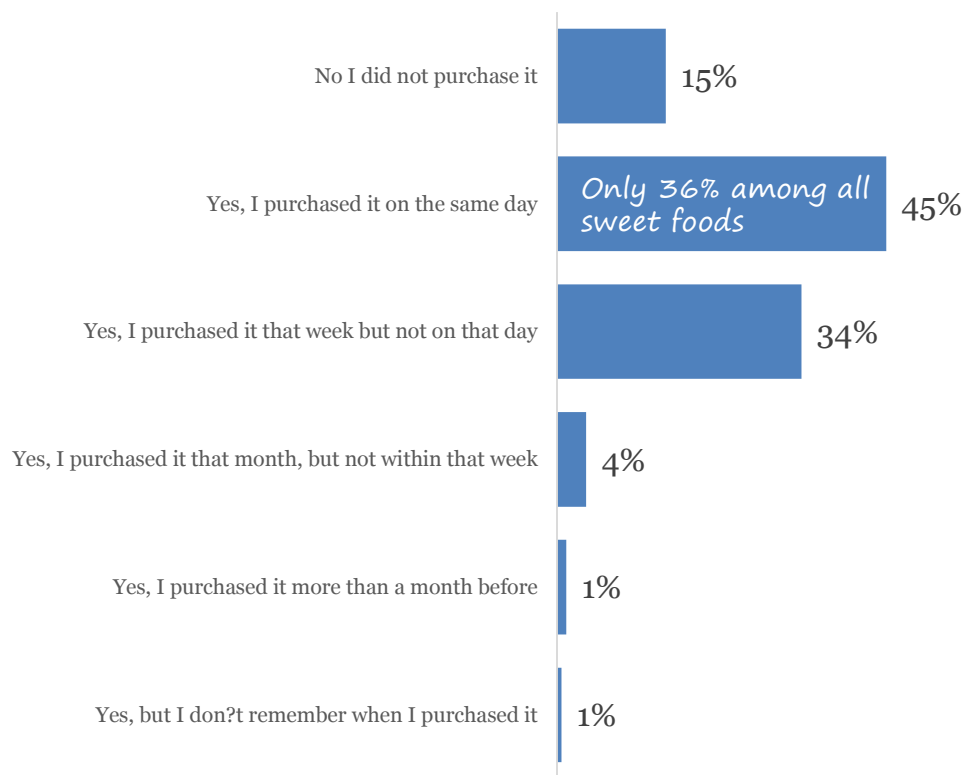


Chilled cake or pastry	Frozen cake or pastry	Ambient cake or pastry	Pre-packaged, not individually wrapped	Individually wrapped
18%	13%	14%	16%	18%
28%	28%	32%	32%	29%
30%	31%	36%	30%	29%
2%	7%	3%	3%	4%
7%	10%	5%	5%	8%
10%	15%	7%	8%	14%
7%	15%	7%	8%	10%
15%	28%	12%	14%	23%
1%	0%	2%	1%	3%



Cakes & pastries much more likely to be purchased & consumed on same day – in particular chilled are not being saved

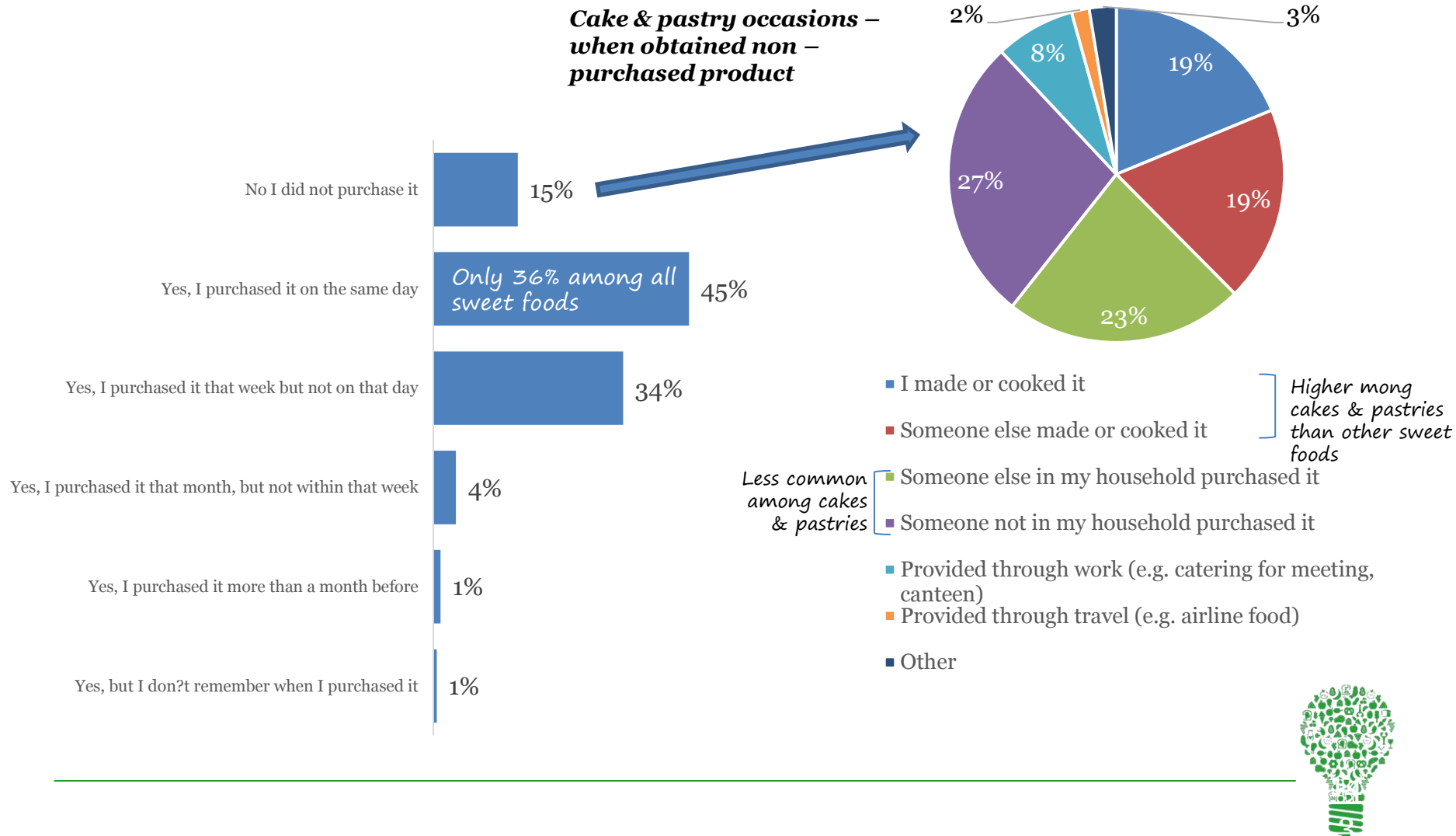
Cake & pastry occasions – when purchased



Chilled cake or pastry	Frozen cake or pastry	Ambient cake or pastry	Pre-packaged, not individually wrapped	Individually wrapped
11%	10%	17%	12%	10%
60%	39%	42%	36%	55%
28%	36%	35%	44%	30%
0%	10%	5%	6%	2%
1%	3%	1%	2%	2%
1%	2%	0%	1%	1%

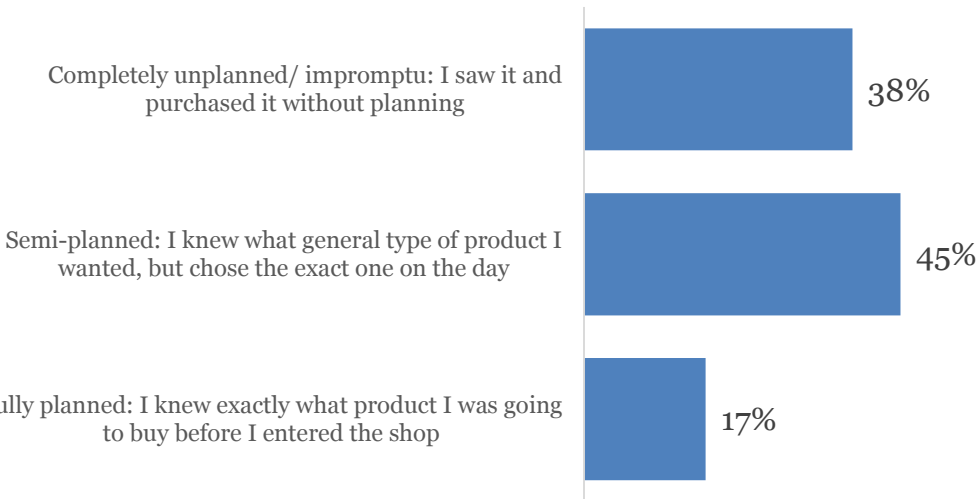


....or if not bought by the consumer, more likely to be home made than non-cake sweet foods



Cakes & pastries are slightly more semi-planned than all sweet food occasions = opportunity at fixture to trade up

Cake & pastry occasions – planning

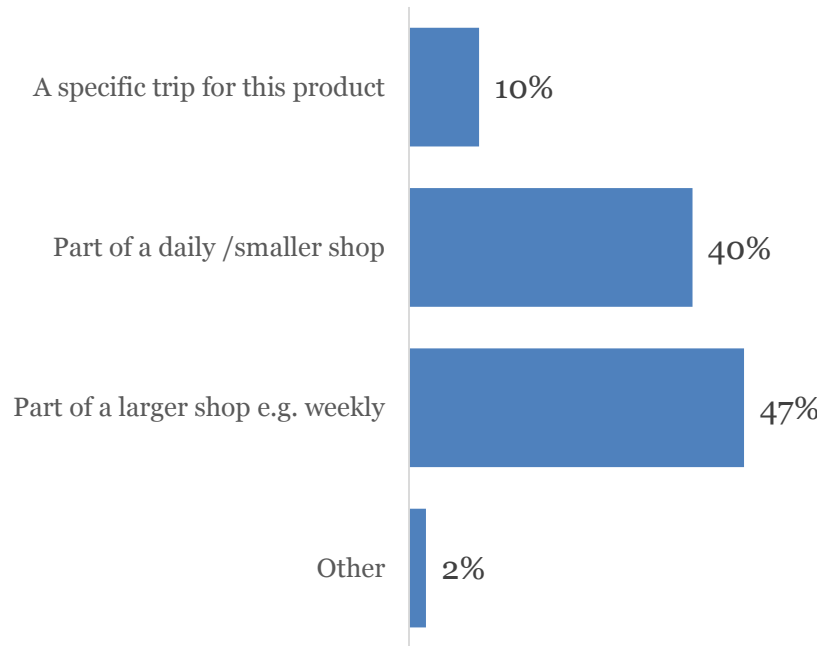


Chilled cake or pastry	Frozen cake or pastry	Ambient cake or pastry	Pre-packaged, not individually wrapped	Individually wrapped
42%	38%	38%	38%	40%
46%	42%	45%	43%	45%
13%	20%	17%	19%	15%



Cakes & pastries are slightly less likely than other sweet foods to be bought as part of a weekly shop, but this is still the dominant mission – especially for ambient

Cake & pastry occasions – shopping mission

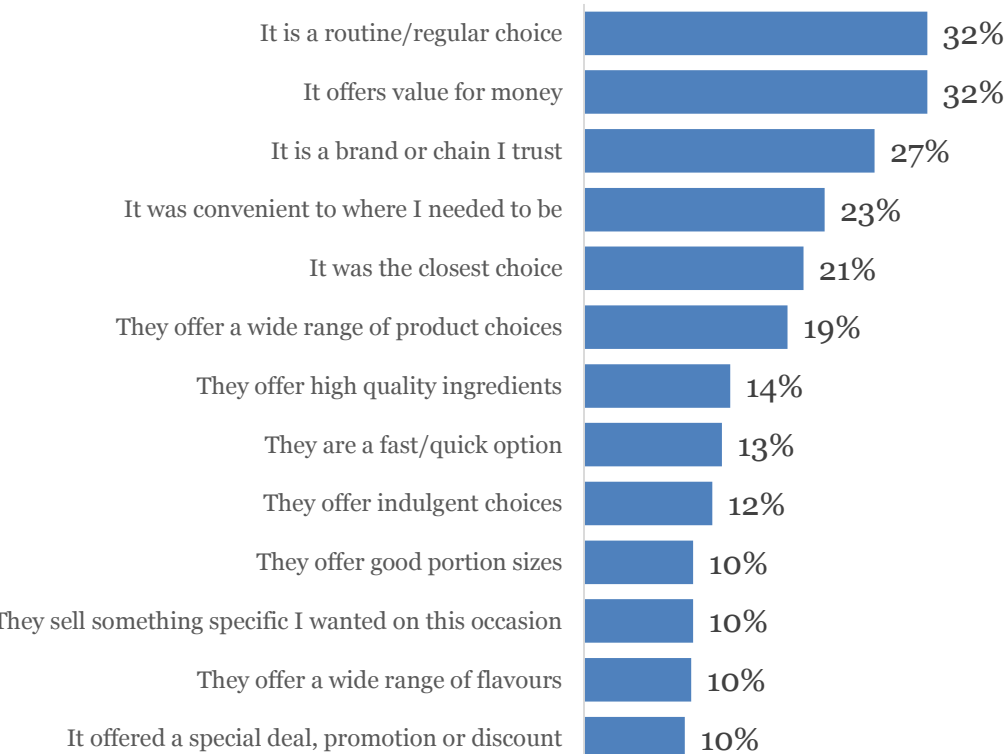


Chilled cake or pastry	Frozen cake or pastry	Ambient cake or pastry	Pre-packaged, not individually wrapped	Individually wrapped
15%	13%	7%	10%	15%
51%	36%	37%	39%	35%
31%	48%	53%	50%	48%
3%	0%	2%	2%	2%



Pre-packaged channel choice is driven by convenience & value, while frozen channels are chosen for their range

Cake & pastry occasions – Purchase channel reasons for choice

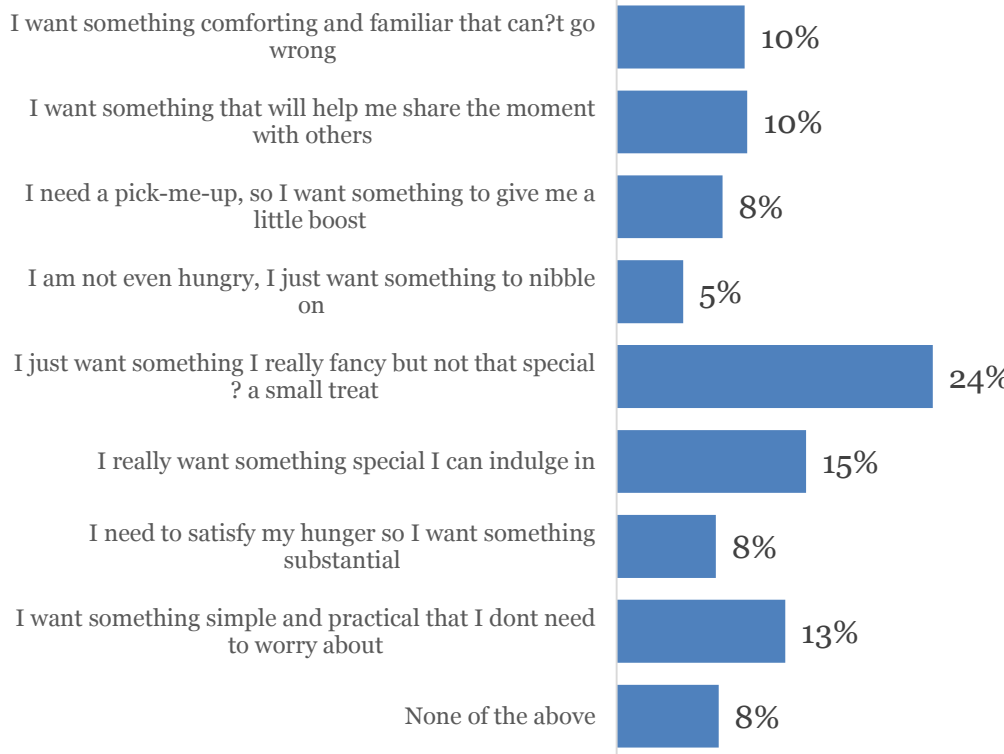


Chilled cake or pastry	Frozen cake or pastry	Ambient cake or pastry	Pre-packaged, not individually wrapped	Individually wrapped
27%	16%	37%	36%	31%
24%	44%	34%	38%	29%
23%	26%	30%	33%	19%
19%	16%	28%	25%	12%
24%	20%	20%	21%	19%
19%	26%	20%	24%	15%
17%	11%	14%	12%	17%
19%	11%	12%	12%	18%
15%	9%	11%	11%	12%
13%	9%	10%	11%	10%
14%	7%	9%	12%	10%
11%	18%	7%	10%	11%
11%	7%	9%	12%	7%



Chilled is especially indulgent , while frozen fulfils a need for convenience & simplicity – but all are dominated by the everyday treat need

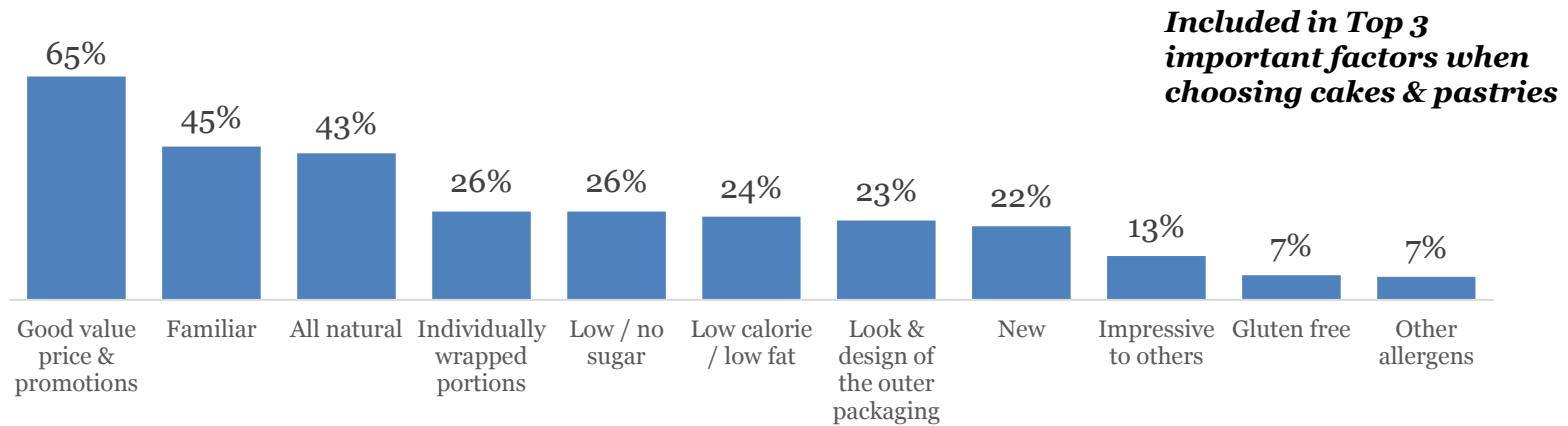
Cake & pastry occasions – Needs behind purchase



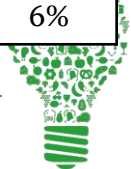
Chilled cake or pastry	Frozen cake or pastry	Ambient cake or pastry	Pre-packaged, not individually wrapped	Individually wrapped
14%	7%	10%	11%	10%
11%	12%	10%	11%	9%
9%	12%	8%	6%	9%
4%	3%	6%	5%	7%
22%	20%	26%	25%	20%
23%	18%	12%	16%	13%
6%	10%	7%	5%	12%
8%	18%	13%	12%	18%
4%	2%	9%	10%	3%



All natural and low sugar and low cal are the most important ingredients features

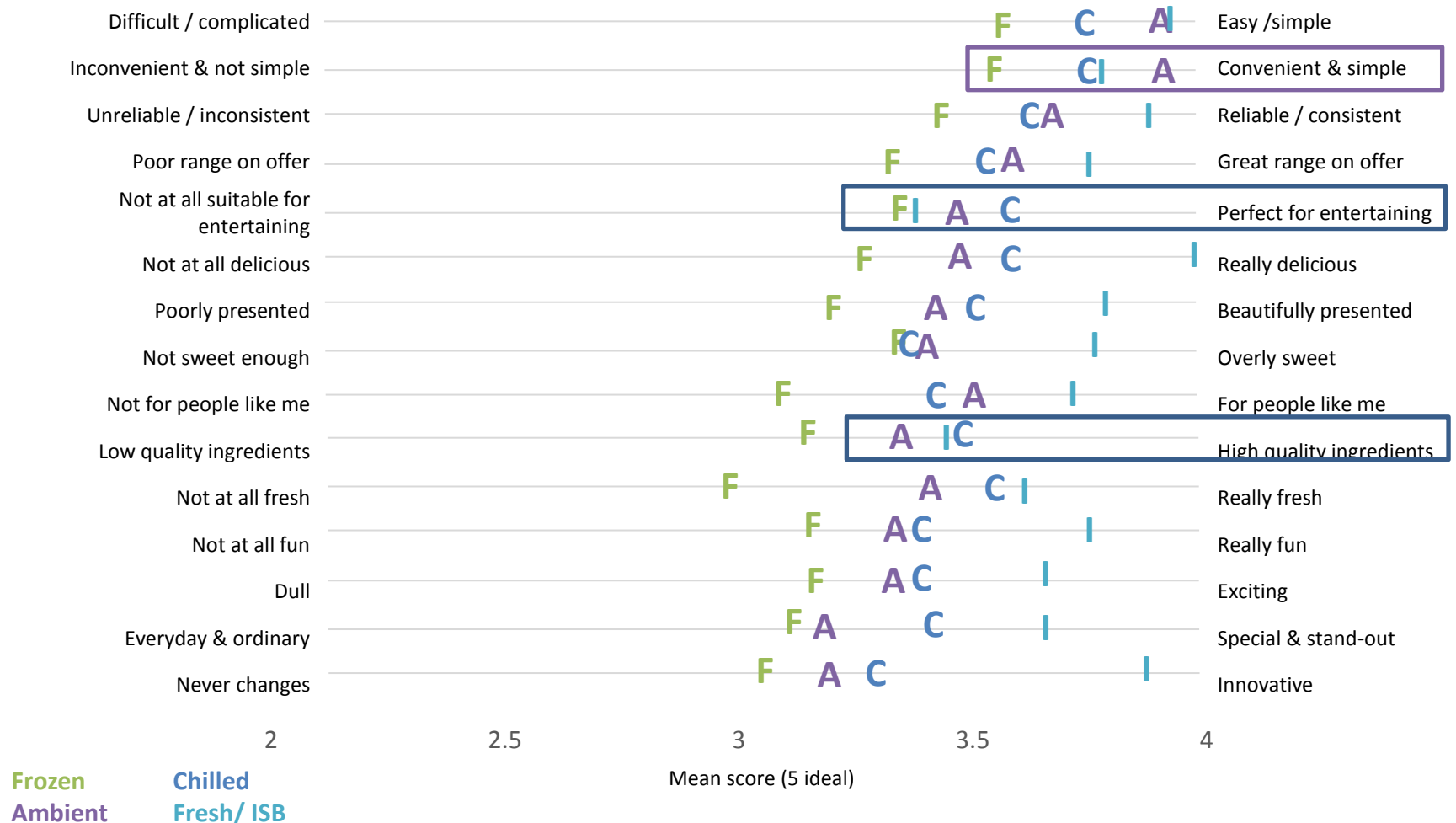


M 18-34	44%	37%	27%	36%	30%	24%	24%	29%	26%	13%	10%
M 35-54	72%	44%	39%	18%	26%	22%	29%	25%	6%	9%	9%
M 55+	71%	54%	46%	32%	25%	21%	18%	18%	9%	3%	3%
F 18-34	59%	47%	30%	20%	20%	28%	30%	31%	15%	12%	9%
F 35-54	76%	44%	44%	29%	20%	20%	30%	21%	11%	2%	5%
F 55+	62%	42%	59%	23%	33%	30%	12%	12%	15%	7%	6%
AB	59%	42%	50%	26%	25%	25%	21%	22%	12%	9%	9%
C1C2	70%	45%	39%	25%	25%	24%	24%	23%	15%	6%	5%
DE	67%	51%	38%	28%	31%	22%	25%	18%	8%	5%	6%

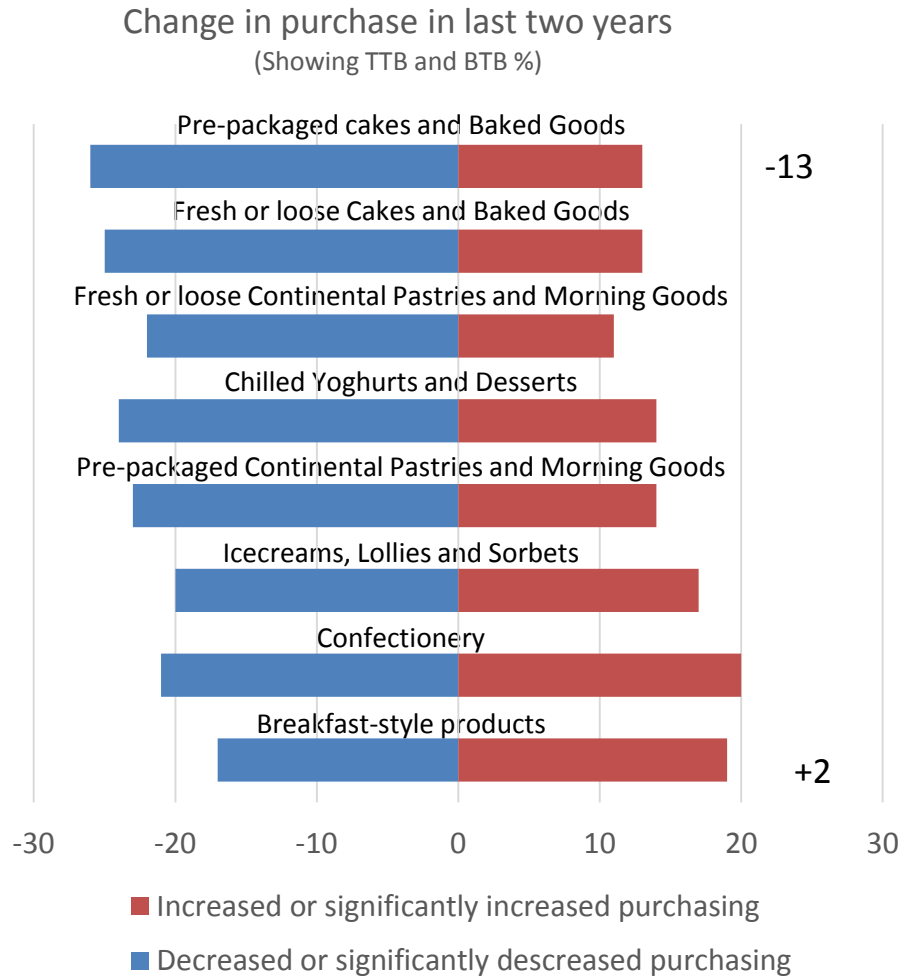


Ambient is all about convenience; if manufacturers can innovate within chilled and fresh they can claim a premium price for a more premium experience

Subcategory associations for pre-packaged cakes

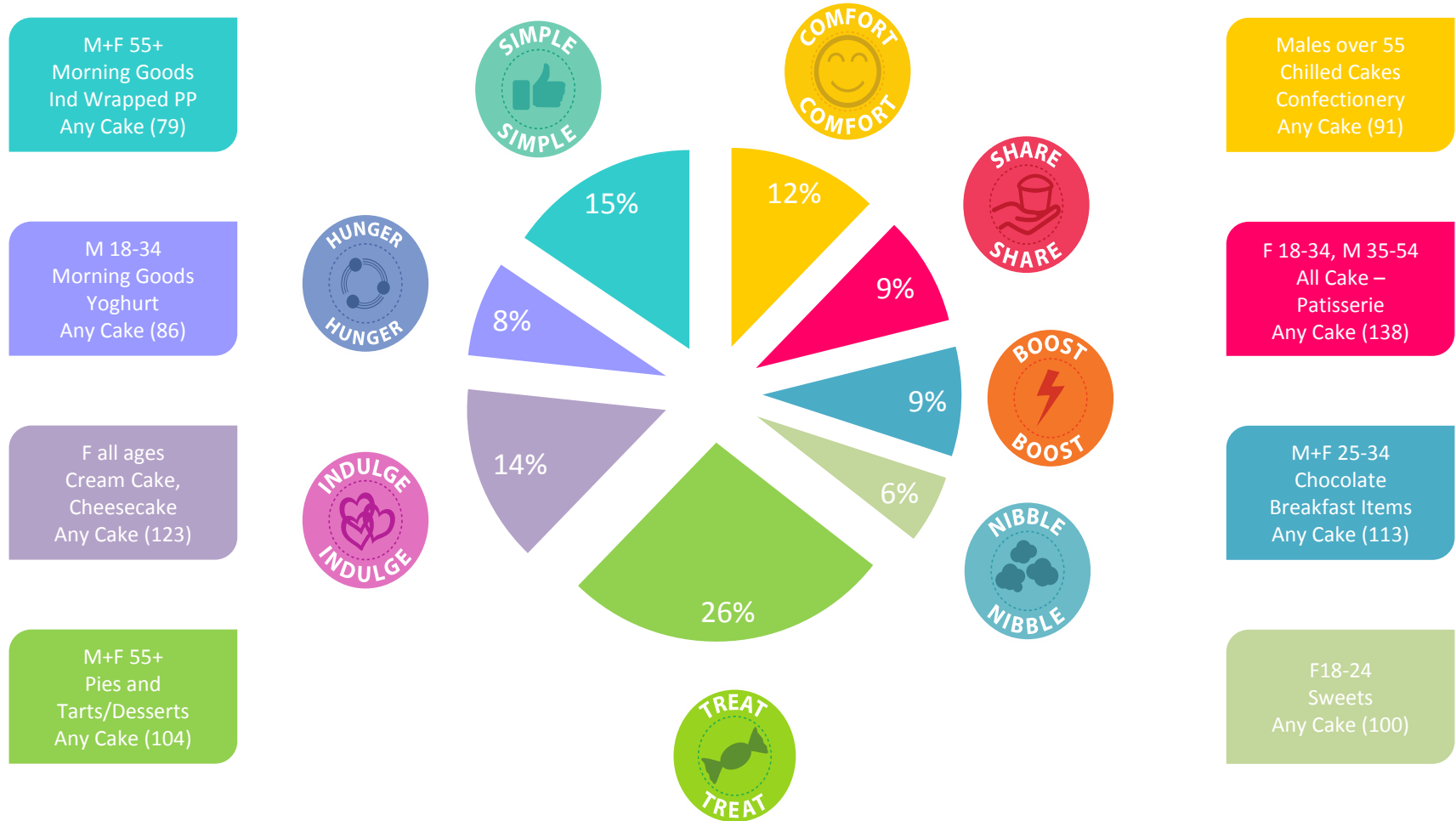


Key barriers to category growth are not insurmountable: breakfast and confectionery continue to stay stable/small growth through format innovation



- **Key reasons for increase in pre-packaged cake purchasing:**
 - Increased income
 - Have kids now
 - Retiring/more time at home
 - On offer more than other categories
- **Key reasons for decrease:**
 - Health / sugar / fat concerns
 - Decreased income
 - Access to fresh bakery or baking more at home
 - Tastes changing

Cake over indexes in its cultural home of indulge and share but underperforms in comfort, simple and hunger

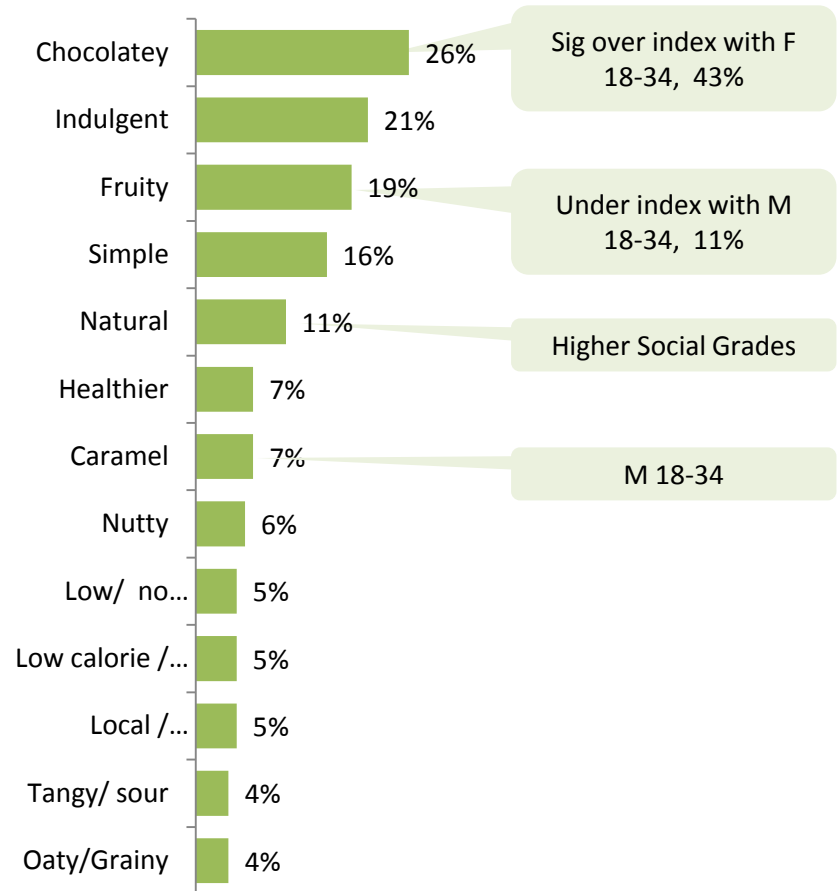
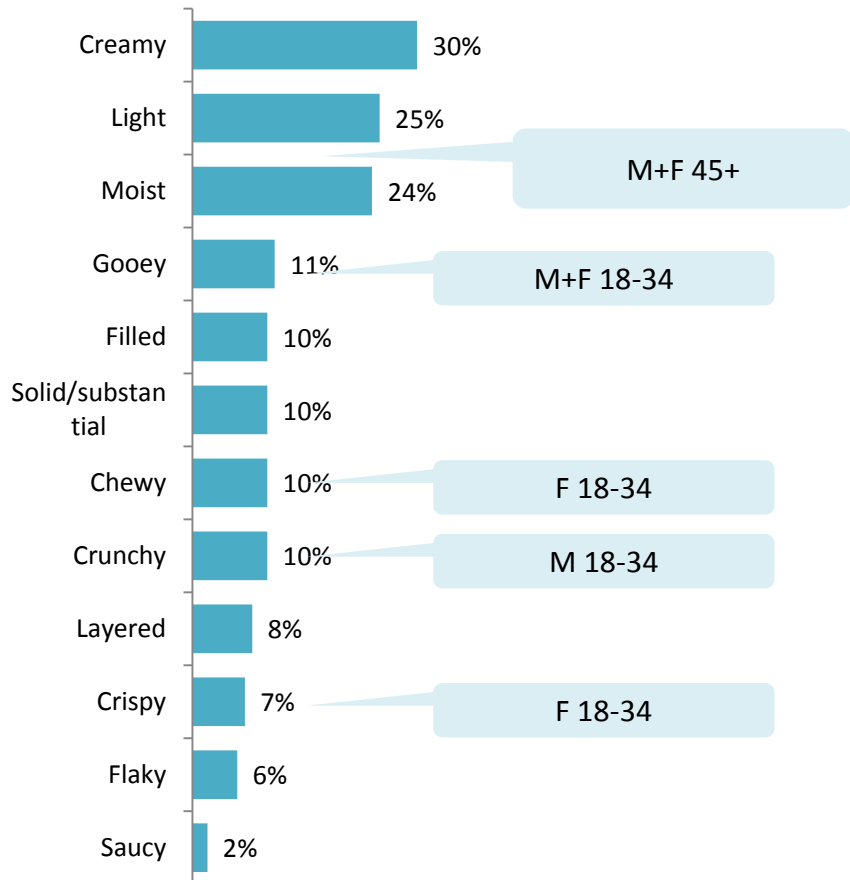


B15. Please select the one that best represents how you felt / what you needed on this occasion from your [...]

B16. Looking closer at your choice of [..] - we're interested in the product attributes of this item.

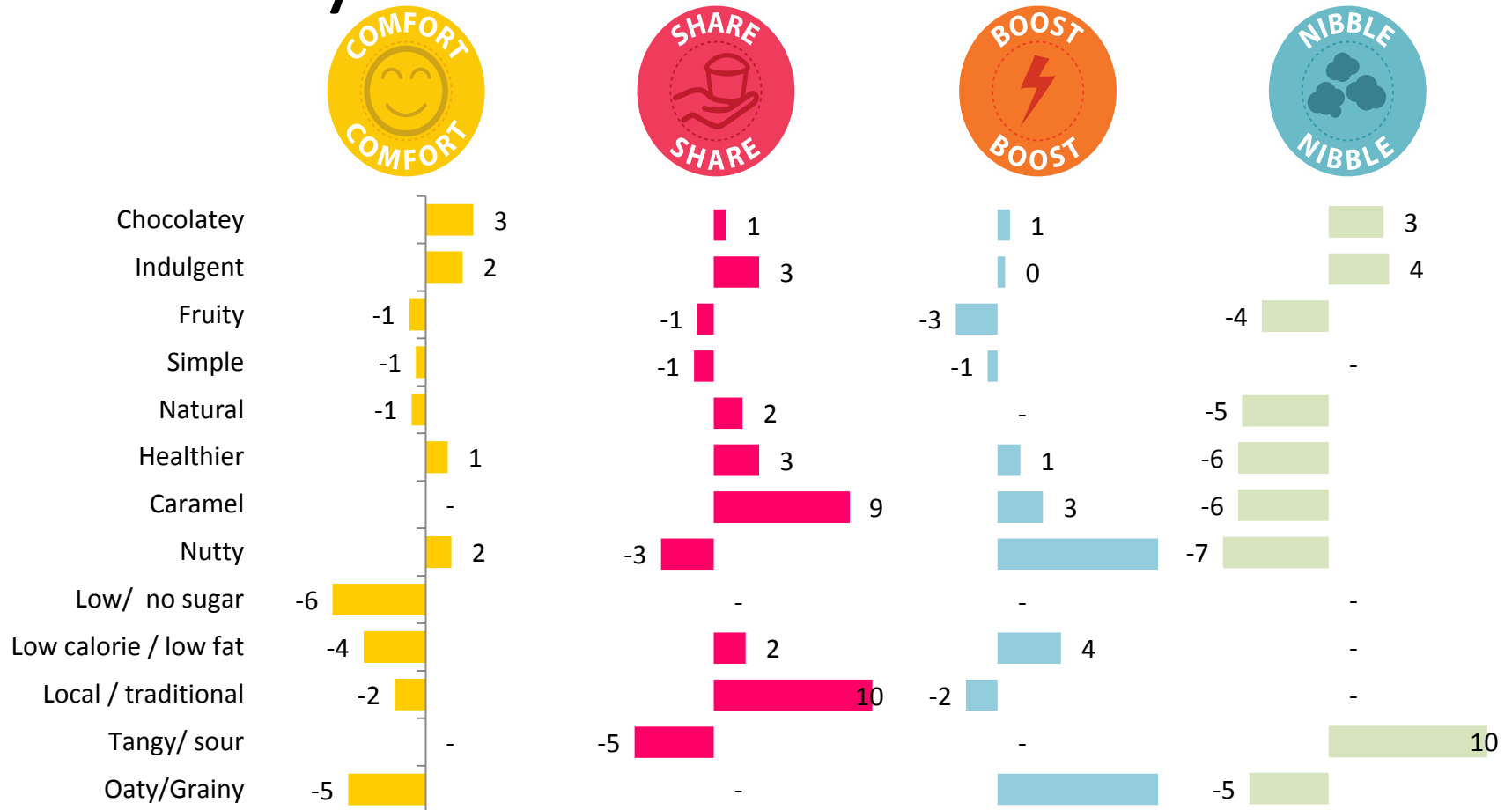
Sweet Foods Textures and Flavours Profiles

"Anything chocolatey
will always sell"
Food writer



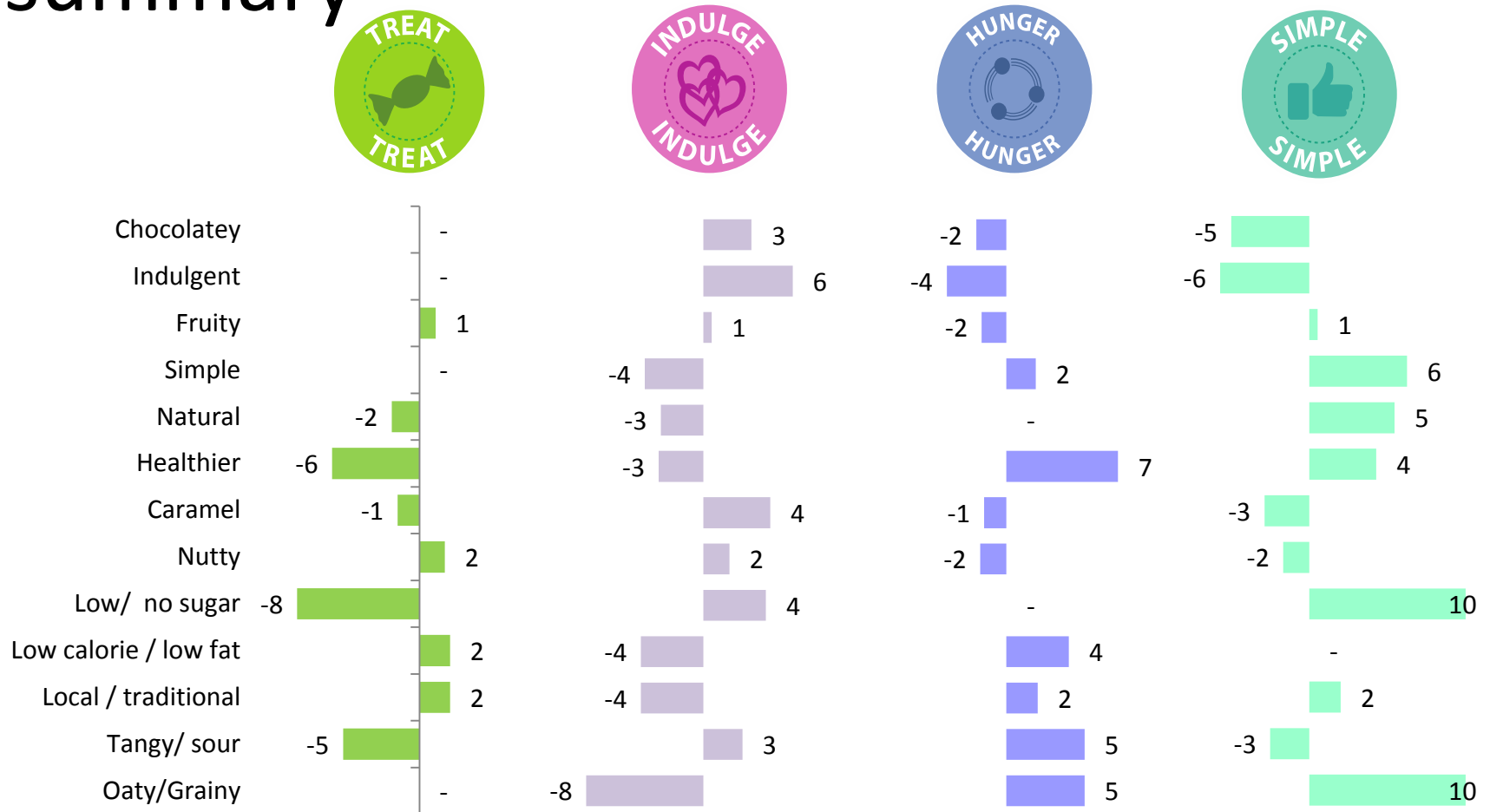
B16. Looking closer at your choice of [...] - we're interested in the product attributes of this item.

Needs and flavours summary



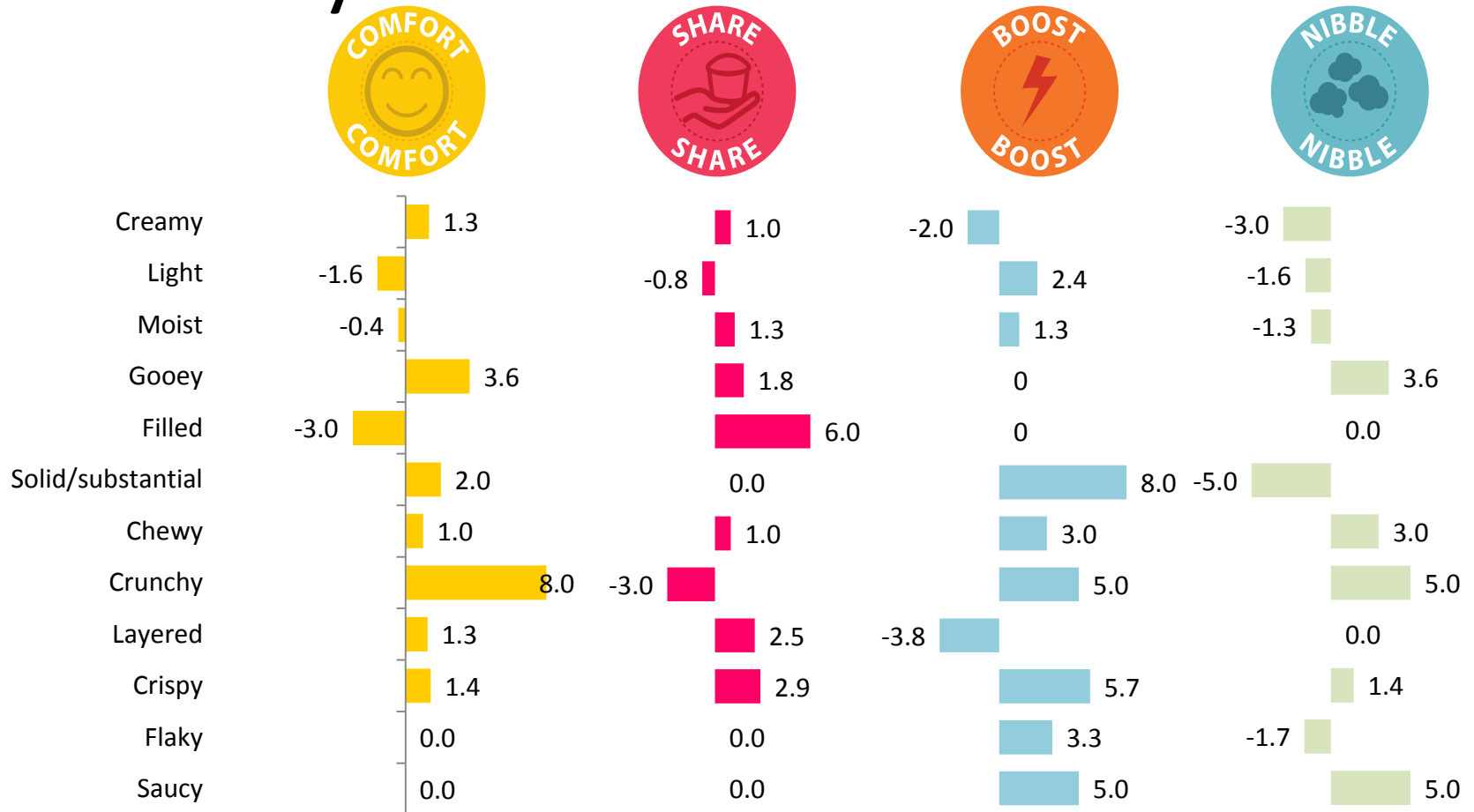
B16. Looking closer at your choice of [...] - we're interested in the product attributes of this item.

Needs and flavours summary



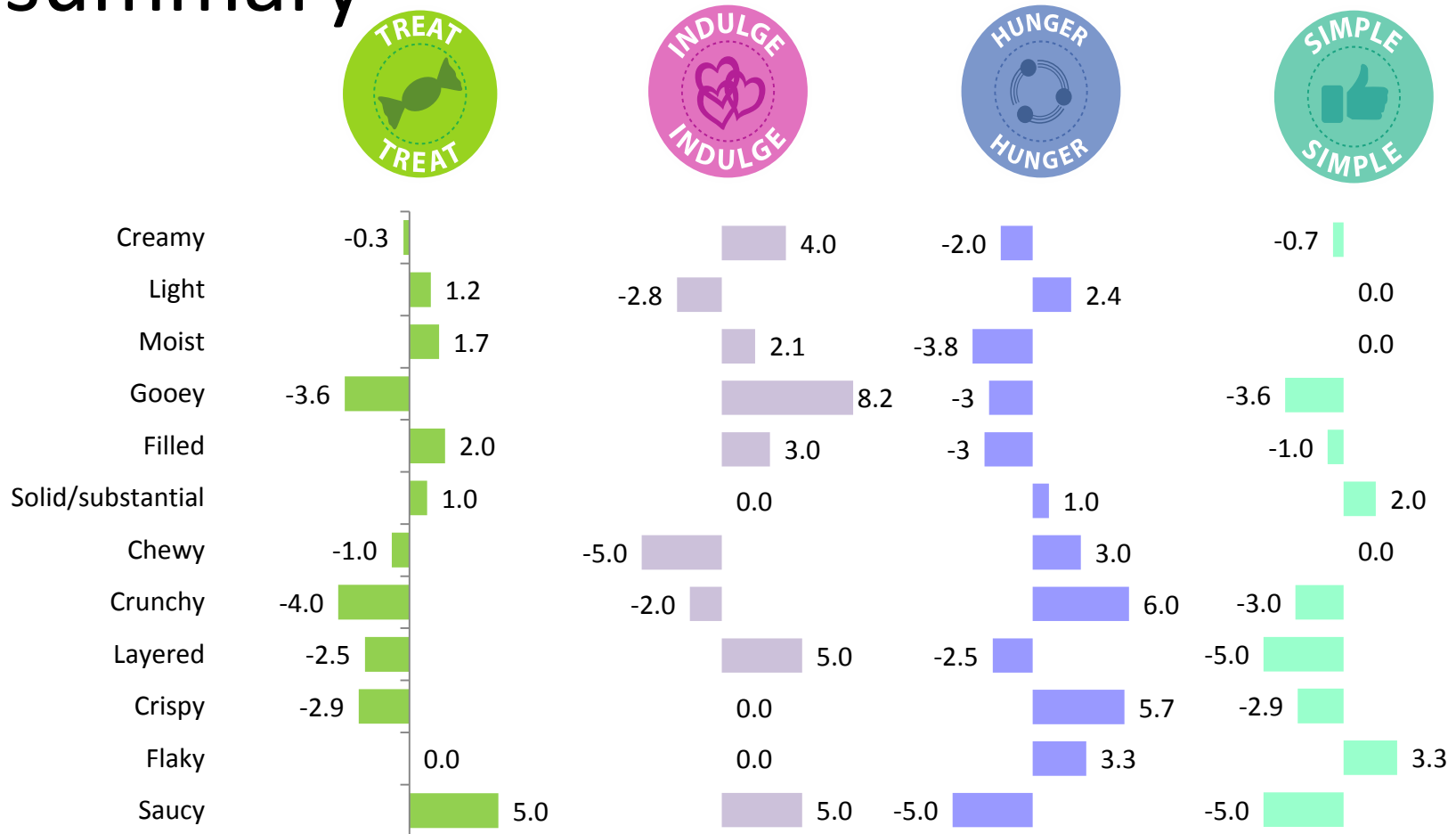
B16. Looking closer at your choice of [...] - we're interested in the product attributes of this item.

Needs and textures summary



B16. Looking closer at your choice of [...] - we're interested in the product attributes of this item.

Needs and textures summary



B16. Looking closer at your choice of [...] - we're interested in the product attributes of this item.

Cakes & pastries

For further information on this study please contact

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Consumer Insight



Growth through consumer understanding

Growing the success of Irish food & horticulture

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