final report

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JBS Consumer Insights Analyses in Australian lamb products

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Abstract

Learning from Market research data in developing new red meat products has traditionally been an area not fully immersed in the process for ideation and opportunity identification. An improvement in the know how to undertake this task and enable informed decision making of targeted consumer and market insights may reduce market failure and lead to an increase in value added products utilising Australian beef and lamb. As part of the new product development process, a suitable approach for completing market opportunity assessment, consumer segmentation, buying behaviours, competitor and market channel analyses are important attributes that influence idea generation, screening and overall category management and developing a business case. Currently, JBS rely on tendering for product briefs (toll manufacturing) and adhoc sales enquiries and ideas to present at range reviews with limited supporting intelligence show casing product life cycling, target market and purchase intent aspects.

This project will focus on learning from insights data with a nominated consultant to build JBS's capability to create value added lamb products portfolio and business model that can deliver the benefit highlighted by the insight (i.e. "keep the insight in sight"). This will significantly position JBS to identify opportunities and deliver targeted new product development and brand range reviews and strategies. Mining current MLA industry data (such as Millward Brown Consumer Tracking, Nielsen Homescan, Meat Expectations etc.) to develop a customised source of data for JBS along with other market research approaches will also be explored.

Using this project as a case study, an evaluation of how to learn from data can help build a consumer led innovation strategy whereby finding and identifying consumer behaviour and market insights and trends lead to targeted product design, marketing mix and portfolio development to grow red meat demand and brand positioning.

Executive Summary

The primary objective of this work will be to identify what “consumer/market” data and how to cut the data as a business intelligence tool to identify new product, customer & market opportunities with a targeted marketing mix.

The specific project objectives will be to develop a framework to collate and interpret analyses of data to:

- Identify customer segmentation, buying behaviours, competitor analyses, market channels and category management.

- Identify what data and how to cut the data as a business intelligence tool to identify new customer & market opportunities.

Key findings from this project will lead to opportunity identification for JBS’s targeted growth strategy for new value add lamb product range under their “Red Gum Creek” and Great Southern” brand positioning to be consumer-led launched in 2014/2015 in domestic retail and foodservice markets.

It is now acknowledged this is a Go / No Go point of the project with the current outcomes to be reviewed and approved by the project group to allow the project to progress to the Milestone 5. Due to shifts in priorities and evolving business, JBS & MLA subsequently decided to terminate the project prior to the commencement of Milestone 5.

The following steps are proposed should the project have continued.

- Report on Category Strategy (Internal) to JBS/MLA. (Milestone 5) includes a presentation to JBS/MLA of market data with needs states filter (category strategy) & Brainstorm Session (NPD)
- Final report on Insights pipeline (NPD) & domestic retail category review strategy. (Milestone 6)
- Presentation of final report by Insights Dr. Detailed final report on collecting, collating and analysing data to identify JBS lamb product opportunities for identified markets. (Milestone 7B).
  JBS & Dr Insights to produce an industry report on general process of collecting, collating and analysing data to identify meat product opportunities for general markets (Milestone 7A).

Due to changes in JBS business priorities, the project was subsequently terminated before completion.

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1 Background

1.1 Project Description

Learning from Market research data in developing new red meat products has traditionally been an area not fully immersed in the process for ideation and opportunity identification. An improvement in the know how to undertake this task and enable informed decision making of targeted consumer and market insights may reduce market failure and lead to an increase in value added products utilising Australian beef and lamb. As part of the new product development process, a suitable approach for completing market opportunity assessment, consumer segmentation, buying behaviours, competitor and market channel analyses are important attributes that influence idea generation, screening and overall category management and developing a business case. Currently, JBS rely on tendering for product briefs (toll manufacturing) and ad hoc sales enquiries and ideas to present at range reviews with limited supporting intelligence show casing product life cycling, target market and purchase intent aspects. This project will focus on learning from insights data with a nominated consultant to build JBS's capability to create value-added lamb products portfolio and business model that can deliver the benefit highlighted by the insight (i.e. "keep the insight in sight"). This will significantly position JBS to identify opportunities and deliver targeted new product development and brand range reviews and strategies. Mining current MLA industry data (such as Millward Brown Consumer Tracking, Nielsen Homescan, Meat Expectations etc.) to develop a customise source of data for JBS along with other market research approaches will also be explored.

Further, this project will complement the outcomes from lean cost manufacturing imperatives and learning from data for production and planning (P.PIP.0413 pending proposal) as JBS develop a consumer led innovation strategy whereby finding and identifying consumer behaviour and market insights and trends lead to targeted product design, marketing mix and portfolio development.

1.2 Project Background

JBS has identified the opportunities in a design lead innovation approach to new product development. Furthermore, JBS are looking to evaluate sources of data that can help shape their understanding of their customer and their customer's customer. JBS recognizes there are many sources of data. Trends research involves developing a strong understanding of macro-economic forces, macro consumer trends and innovation examples relevant to your category.

JBS proposes to undertake a gap analysis that involves identifying gaps between consumer needs and the actual supplied lamb product or service. A technique relevant to beef/lamb is activation/deprivation, where participants change their behaviour for a period of time – heavy users eat less, light users more – and record their experiences and what they have learned. This method helps uncover barriers (what difficulties do respondents come across when they change behaviour), drivers (what's good about the change) and change agents (how can we convince people to make the change) relevant to the trial of new products. This technique would work well in the initial stages of NPD research.

MLA current several sources of macro data that is accessed periodically. MLA's current portfolio of market research includes the following list (Refer to Table 1).

Table 1: MLA's current portfolio of market research

Project	Purpose
Millward Brown Consumer Tracking	Weekly tracker measuring consumer attitudes and behaviours towards beef and lamb, and measure success of promotional campaigns
Nielsen Homescan	Weekly/Monthly level tracker of meat purchasing
NFS Butcher Pricing	Monthly tracker of prices and attitudes in independent retail sector
BIS Foodservice	Bi-yearly survey of usage and attitudes in foodservice sector
Shopper Tracker	Yearly survey of category drivers and perceptions of each retailer
Meat Expectations	Yearly survey of consumer drivers towards each meat
Healthcare Professional Tracking	Measures success of MLA programs aimed at healthcare professionals

MLA currently disseminates quarterly category report of Australian meat purchasing data (source is Nelson) to industry partners and other customised options on a case by case basis. MLA also has other communication modes such as magazines, and e-news bulletins.

There are also several sources of commercial proprietary data that is generally very specific and very expensive to access. There are limitations to what data can be purchased and accessed if you are not a vendor within that category. Data can be categorised into

- market data,
- shopper research and
- consumer research.

The proposed project will evaluate available data and customise to demonstrate a process for JBS to identify customise and market driven new lamb product opportunities. The process is to extract data to customise entity requirements and the approach to cut and interpret the data. This project will help define the potential role that MLA will play in future customise driven research as well as provide JBS capability in undertaking this task for their business. This project proposes to evaluate types of data, the sources of data, and methodologies to interpret the data to inform decision making.

1.3 Project Schedule (Milestones 1-4)

Table 2 – Milestone project table.

Achievement Criteria	
1	Collection and collation of existing data including market, consumer and shopper data provided by MLA, JBS and/or external sources (ie mapping current capabilities). Develop a design and report on detailed project scope based on existing data (existing case study).

Achievement Criteria	
2	Complete preliminary data analyses (ie first cut) and present JBS VA capability group & MLA
	Go / No Go Decision* – Approval of preliminary data analyses (ie first cut) and recommendations for an agreed process by JBS and MLA
3	Initial JBS & MLA facilitated workshop to identify gaps in data & capabilities (Session 1). Report on market research & shopper surveys (ie new consumer data) to JBS & MLA. *** Additional web-scraping tool, analysis & presentation
4	Data analyses of shopper & consumer surveys. Gap analysis and reported to JBS & MLA. Training package developed (PIVOTS) to be rolled out to key JBS personnel *** Additional planograms
	Go / No Go Decision* – Presentation x 2 consumer and shopper research approved by JBS & MLA

2 Project Objectives

The primary objective of this work will be to identify what “consumer/market” data and how to cut the data as a business intelligence tool to identify new product, customer & market opportunities with a targeted marketing mix.

The specific project objectives will be to develop a framework to collate and interpret analyses of data to:

- Identify customer segmentation, buying behaviours, competitor analyses, market channels and category management.
- Identify what data and how to cut the data as a business intelligence tool to identify new customer & market opportunities.

Key findings from this project will lead to opportunity identification for JBS’s targeted growth strategy for new value add lamb product range under their “Red Gum Creek” and Great Southern” brand positioning to be consumer-led launched in 2014/2015 in domestic retail and foodservice markets.

3 Methodology

This project will focus on learning from insights data with a nominated consultant to build JBS’s capability to create value added products portfolio and business model that can deliver the benefit highlighted by the insight (i.e. “keep the insight in sight”). This will significantly position JBS to identify opportunities and deliver targeted new product development and brand range reviews and strategies. Mining current MLA industry data (such as Millward Brown Consumer Tracking, Nielsen Homescan, Meat Expectations etc.) to develop a customised source of data for JBS along with other market research approaches will also be explored.

The following proposed steps:

- Market & consumer data stocktake
- Identify gaps in existing data sets
- Strategy – category management development
- Capability building – rollout of training modules

The following sources and types of data need to be evaluated:

Market Data:

- Case study category review of Flavour Makers Passage to India meat sauces presented to JBS sales & marketing team for sign off as a methodology to be used for this lamb insights consumer insights
- HomeScan Coles Meat Unit trading department category (which includes current sales transactions + 2yrs back data, available online so no user access/# issue), but Lamb only $40K)
- Woolworths AZTEC Meat Unit trading department category
- Total Meat Australia (if possible)
- Market Channel data (MLA source)

Shopper Research (top line data to include – depending on gaps/budget/post analysis):

- Purchase Decision Hierarchy
- Category Drivers
- Purchase Triggers
- Planned Vs Impulse Purchase Behaviours
- Cross Category Purchasing
- Store Navigation
- Price & Promotions
- Importance of Ingredients
- Importance of Claims
- Category Improvements

Consumer Research (top line data includes – depending on gaps/budget/post analysis):

- At Home Diary Studies
- Online Packaging Testing
- Online Consumption Experience

4 Results

4.1 Complete preliminary data analyses (ie first cut) and present JBS VA capability group & MLA (Milestones 1&2)

There have been significant delays experienced in the project due to the inability to access Coles and Woolworth's data. It is unlikely in the foreseeable future that data will be obtainable from Coles and Woolworths, however still possible. Regular updates are being requested from the data provider, and they are aware that we are seeking this pending data. If the requested data is rejected, there may be other options to retrieve several scan data points, however these options have not been discussed nor explored as yet due to the project assumption of gaining full data access.

- Milestone 1 has been completed in terms of collating and collecting all possible data points, to the exclusion of the above scan data access. The current capabilities and gaps in data have been mapped out, and a case study example has been developed, which details the project scope and outcome expectations for deliverables.

- Milestone 2 has been completed with the creation of a PowerPoint presentation intended to update the project team on the current state of data acquisition, the next steps that are required, and the expected outcomes. Please note that page 10 is not achievable without scan data access, however the rest of the deliverables are still much achievable.

It is also worth noting the following changes from the original project brief, and thus and additional time spent on the project from the consultant which has not been included within Milestone 1 and 2;

1) Scan data was said to already exist somewhere, and be simply a matter of locating and sending through to the consultant. Reality is that scan data doesn't already exist, and therefore the consultant has spent well over **10 days** total in aggregated time spent on phone calls, emails, quote retrievals, and meeting with JBS in order to organise the acquisition of such scan data services – which are still continuing on a weekly basis.

2) Whilst waiting for the data access, JBS have requested two separate workshops be facilitated in order to collect and collate existing data from key personnel. The initial workshop was held at JBS Brooklyn, with MLA attendance, with the aim of identifying gaps in the data & capabilities that meat companies use in order to develop insights in NPD. The second workshop was held with Andrew Meats, Syd, and was requested in order to acquire any additional information that another meat companies would use in order to develop insights in NPD. An additional **6 days** spent on the preparation and delivery of the presentation and workshop.

3) Since the beginning of the project, the consultant has maintained regular contact with JBS, which has attributed to approximately **3 days** in time spent towards attending project update meetings and phone calls on at least a monthly basis.

4.1.1 Passage to India Case Study

This case study, which is based on another manufacturer's Indian Category range review, details the scope of the current project in terms of expected outcomes, which include;

- Introducing the concept of incorporating Homescan data to frame the market view of a category for a range review process
- Highlighting the key differences between competitors overall and by different segments
- Providing a snapshot SWOT of the category, to indicate where gaps/opportunities may exist
- Showcasing examples of consumer and shopper research, its analysis & recommendations
- Developing a category strategy based around the analysis of the multiple data points
- Creating a pipeline of NPD, based on growth drivers, occasion pillars and need states
- Suggesting planogram shelf changes, based on analysis of multiple data points
- Summarising recommendations for next steps

NOTE: All of the above can be delivered without the need for Aztec Scan data.

4.1.2 JBS MLA Milestone 2 Report

This 17 page PowerPoint presentation summarises what has been achieved in the project thus far and what the next steps involve, which include;

- The journey overview, noting we're at the information gather stage
- Indicating which data points have been collected, versus which are still outstanding
- Research next steps, for consumer and shopper gaps in the current data
- Providing an example of how insights from such further research can link into the overall project strategy.
- Ie; Discovering in the shopper research findings/analysis that product 'format' was more important in the shopper decision hierarchy compared to 'brand', led to the recommendation of relaying the shelf planogram by 'format' type, instead of by 'brand'. As a result, the category showed a noticeable increase in val sales after this recommendation for a shelf relay was actioned.
- Please note: page 10 indicate an example of what can be achieved if we manage to gain access to the Aztec Scan data, however if unable to gain such, again please note that the rest of the project is still very much achievable.
- Creation of strategy based on the analysis of multiple data points

4.2 Facilitated Workshops to identify gaps in data & capability (Milestone 3)

Initial JBS & MLA facilitated workshop to identify gaps in data & capabilities (Session 1). Report on market research & shopper surveys (i.e. new consumer data) to JBS & MLA. *** Additional web-scraping tool, analysis & presentation.

4.2.1 Workshops

There were several workshops conducted, one with JBS & MLA, another with Andrew's Meats, and there was an additional session with MLA to discuss any further consumer or shopper insights that were available for the project. The 27 page presentation full set of slides is available as a supporting document in the appendix, however the following aims to highlight the key topics that were typically covered in the workshops and meetings;

- Introducing the journey overview for the project, including the process of info gathering
- Conducting SWOT analysis for meat, beef, lamb, JBS
- Mapping the consumer journey, highlighting different location vs time for occasions
- Explaining different types of qualitative sensorial research, inside vs outside of the store
- Exercise on competing categories for lamb, regarding involvement vs freshness
- Shopper Decision Hierarchies, differences for meat vs lamb vs beef
- Presentation on global market / flavour / packaging insights
- Highlighting the difference between the correct and incorrect use of insights
- Introduction to category growth drivers, and examples in other categories
- All data collected from the workshops will be used in further analysis

4.2.2 Report on market research & shopper surveys (Web-scraping Report)

It was identified that there was a gap in the project's insights surrounding the online consumption and search behaviour for the lamb category. A webscraping tool was developed and a detailed 37 page report was created which summaries the key findings of the research;

- Research introduction, objectives, methodology, data collection & API queries
- Category Overview, total Aus lamb category sales, sales volume by state
- Retailer Landscape, website overviews of selection styles
- Woolworths online pricing by category, by cut, by promo depth
- Coles online pricing by category, by cut, and by brand
- Taste.com ingredient trends by difficulty, servings, and ingredient count
- Google searches with lamb, by region
- Youtube searches with lamb, by region
- You tube profiles, with key statistics including videos with lamb in the title
- Woolworths and Coles youtube profiles with statistics
- Instagram, sentiment analysis, top tags and trends
- Examples of current lamb tagged images

4.2.3 Additional Web-scraping tool, analysis & presentation

An online dashboard tool was developed which tracks the online behaviour of people searching the lamb category. The current project identified that there has been an increase in online search options over recent years, and an increase in younger generations engaging in online search behaviour before and after purchasing the lamb category, however that there is limited research within this space. The web-scraping research addressed the following questions;

- What key words do people search with lamb?
- Which regions search more than others?
- What recipes are most commonly searched for?
- Which line cooking videos are most popular?
- What other ingredients are most commonly used?
- What do retailers communicate online and how?

Web-scraping is essentially extracting large amounts of data from different websites, saving it all in one placed, and delivering an output in a more concise summary. Benefits of this methodology compared to other traditional options is;

- Sample size/selection/location is more robust as it's universal and fluid Vs 1off & static
- Insights collected are more accurate /actual vs perceived
- Data is real time / live Vs one off and quickly out dated

The 33 page presentation is found in the appendix. This enabled JBS the benefits of having a greater understanding of the current market dynamics, to make quicker and more informed decisions, to have closer alignment with the retailers, and as an end result to produce NPD that better meets the needs of consumers.

4.3 Data analyses of shopper & consumer surveys (Milestone 4)

Data analyses of shopper & consumer surveys, Gap analysis and reported to JBS & MLA. Training package developed (PIVOTS) to be rolled out to key JBS personnel *** Additional planograms

4.3.1 JBS Lamb Retail Survey

JBS has identified that often retailers can be very private with the transparency of their sales data, and that it can at times be very challenging to establish a collaborative discussion regarding the current status of the category and the future anticipated strategy for the category. Therefore IDR was requested to develop a retail based survey, which summarised the key questions JBS would want to ask the retailers, including;

- Overview statement, with objectives, confidentiality and thanks
- Category responsibility and focus for next 3 months
- Market insights, % share of meat category, growth in meat category per sub category
- Top 5 lamb sub category market insights
- Top 5 Lamb skus market insights
- Range of other questions to understand category focus, direction, drivers, & needs

4.3.2 Training Package (V Look Ups)

As the Aztec data was not available as first expected, the training for Pivots was postponed until a later point in time if/when such data would become available. Therefore V Lookups were instead deemed the next most appropriate training module to deploy. A short presentation (in appendix) was delivered to JBS, alongside handouts for examples as to how to perform such functions, and then a live demonstration was conducted to explain the training of such in a live example.

4.3.3 Additional Planograms

As the lamb category planograms were not provided from Coles and Woolworths as first expected, IDR was requested to conduct a space analysis to include small, medium and large layouts from Coles and Woolworths. The 32 page report is detailed in the appendix, however the report summaries the following information;

- Retailer comparison, in range focus, brand presence, demographic focus, & sku range
- Comparison of facings and % space between retailer layouts
- Photo images of planograms, with text details of skus in range
- Colour coding layouts by serving size, cook, brand, flavour, bone and location type

5 Conclusions/recommendations

5.1 Recommendations

The following are the recommendations:

- Reaffirming that the project on using insight methodology and developing internal JBS capabilities is a high priority for JBS.
- Milestone 1 & 2 is now complete (See an extract of the signed agreement below and also copy of the signed agreement attached). Awaiting JBS & MLA support to continue to progress to MS 3 and beyond.
- A summary of the methodology being proposed and presented to MAL & JBS is provided in the form of slides (see attached).
- Milestone 1&2 report describes the general insights approach being used in the project includes a detailed case study of “Passage of India” and the use of data to provide insights. [Note a detailed Milestone 1&2 report is available on request].
- Note the original project scope proposed accessing Woolworths shopper data in concert with some minimal shopper surveys. Delays experienced in the project are attributable to limitations in accessing /purchasing Woolworths shopper data.
- The provider’s (Insight Dr) recommendation is that the project proceeds and that we are able to achieve the same outcome using the proposed insights methodology in the project for JBS providing that we ramp up the consumer survey component.
- Contractor Play Market Research) has provided a proposal (Project Picnic) to undertake the required enhanced consumer survey study at Woolworths stores. See attached the proposal in the form of slides and store communication.
- The cost of the consumer survey as per the proposal is within the allocated budget allowed for shopper data ($60k).
- JBS in principle supports continuing the project and move beyond the current critical Go/No Go decision point and move to Milestone 3 providing that :

    - The data / analyses is not compromised by recommended change in scope (ie data integrity is maintained by using less shopper data and utilising more consumer survey data)
    - Third party to oversee the methodology and confirm the modified approach is valid. JBS specifically requested MLA's technical input (MLAa)
- We are currently awaiting a critical decision requiring MLA technical input in order to proceed. Request for input from MLA.
- Again reaffirming that JBS supports continuing this project providing that data integrity is assured and that the general insight methodology can be replicated in future (ie hand over of insights capabilities to JBS).

5.1.1 Milestone 3&4

The current Milestone Report covers:

3	Initial JBS & MLA facilitated workshop to identify gaps in data & capabilities (Session 1). Report on market research & shopper surveys (ie new consumer data) to JBS & MLA. *** Additional web-scraping tool, analysis & presentation
4	Data analyses of shopper & consumer surveys. Gap analysis and reported to JBS & MLA. Training package developed (PIVOTS) to be rolled out to key JBS personnel *** Additional planograms

Initially there were significant delays experienced in the project due to the inability to access Coles and Woolworth's data. Next there were delays in gaining access to the consumer and shopper research data – the originally proposed Play research was substituted for the web-scraping analysis due to MLA conducting a large U&A study that was very similar to the research intended from Play. IDR gained access to the MLA U&A study's data in late Dec 2015, the web-scraping presentation was Jan 2016, and now as of Feb 2016 IDR has all elements of data required to proceed with the remainder of the project.

Milestones 3 and 4 have been completed, despite several delays outside the control of IDR, and several adaptations to the original project scope have been made. All deliverables to date have been achieved on time, in full, and received positive feedback from the project team upon completion.

5.2 Next Steps

It is now acknowledged this is a Go / No Go point of the project with the current outcomes to be reviewed and approved by the project group to allow the project to progress to the Milestone 5. Due to shifts in priorities and evolving business, JBS & MLA subsequently decided to terminate the project prior to the commencement of Milestone 5.

The following steps are proposed should the project have continued.

- Report on Category Strategy (Internal) to JBS/MLA. (Milestone 5) includes a presentation to JBS/MLA of market data with needs states filter (category strategy) & Brainstorm Session (NPD)
- Final report on Insights pipeline (NPD) & domestic retail category review

strategy. (Milestone 6)

- Presentation of final report by Insights Dr. Detailed final report on collecting, collating and analysing data to identify JBS lamb product opportunities for identified markets. (Milestone 7B).
  JBS & Dr Insights to produce an industry report on general process of collecting, collating and analysing data to identify meat product opportunities for general markets (Milestone 7A).

6 Key Messages

6.1 Value Proposition & Project Benefits

The value proposition and benefits to wider red meat industry will be via a case study in understanding the available sources of datasets and a framework an enterprise can use to convert information into insights as part of new product development initiatives to grow red meat demand and brand positioning. This project will further develop the external network of service providers who can support the industry in category management and insights networking as part of this process and overall innovation capability development within the industry.

6.2 Adoption of the Project Outcomes

The associated benefits will be validated as part of the project to assist with reporting to the wider industry of the framework used as part of a case study in learning from data. The final report will be in 2 versions – a commercial in confidence report submitted to MLA and a sanitized industry version final report which will be shared via MLA Website. The industry version is to articulate the various datasets available for an enterprise and the approach to cut the data and capture and create value from the insight thereby showcasing the source/scope for design led innovation consumer/market insights play in growing targeted red meat demand.

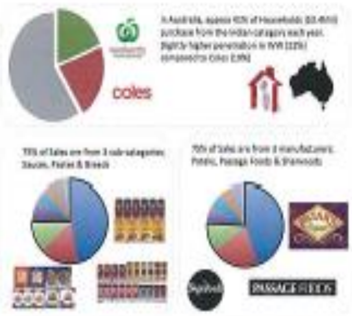
6.3 Intellectual Property

There are existing commercial proprietary products for purchased data. Furthermore, within the category the data agencies offers various services and packages depending if the data is raw or distributed (quick turn summaries with limited ability to deep dive and cut further).

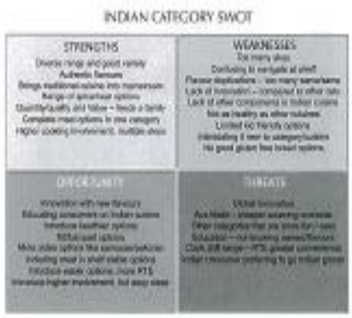
All raw data related to this project purchased by Dr Insights Pty Ltd is to be used solely for the purposes on completing this JBS-MLA project and will not be shared with other entities.

7 Appendix

7.1 Milestone 1 –Detailed Case study - Passage to India




Engaging
The
Senses


TASTE


LOOK


TOUCH


SMELL


SOUND


CONSUMER SENSORIAL HEIRACHY
1. TASTE
2. SIGHT
3. TOUCH
4. SMELL
5. SOUND
How does this apply to the Indian Category?


Shoppers are faced with lots of choices...
FLAVOUR VS HEALTH?
PACK SIZE VS PRODUCT TYPE?
BRAND VS PRICE?
QUICK VS QUALITY?

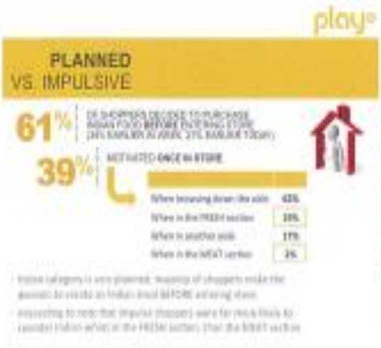

play
OVERVIEW


play
OBJECTIVES


play
METHODOLOGY


play
SHOPPER DEMOGRAPHICS


KEY FINDINGS


play
PLANNED VS. IMPULSIVE
61%
39%


play
CROSS CATEGORY PURCHASING


play
DRIVERS OF AISLE FOOT TRAFFIC


play
INDIAN CATEGORY
PURCHASE DRIVERS


play
PURCHASE DECISION
HIERARCHY


play
POINT OF PURCHASE
TRIGGERS
64%
58%


play
PRICE &
PROMOTIONS


play
IMPORTANCE OF
INGREDIENTS


play
CATEGORY
IMPROVEMENTS
PASSAGE FOODS

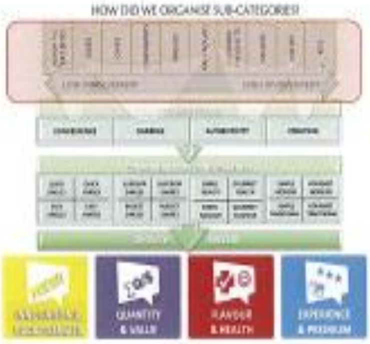

play
SUMMARY
KEY POINTS


play
SUMMARY
RECOMMENDATIONS


SEVERAL KEY THEMES THAT EMERGED FROM ALL OUR RESEARCH - NOW HOW DO WE CREATE A STRATEGY?
CONVENIENCE
HEALTH
SHARING
AUTHENTICITY
FLAVOUR
VALUE
EXPERIENCE
EDUCATION
INNOVATION


RESEARCH AS MANY INSIGHTS AS POSSIBLE...
CATEGORY STRATEGY


WW INDIAN CATEGORY STRATEGY


HOW DID WE ORGANISE SUB-CATEGORIES?

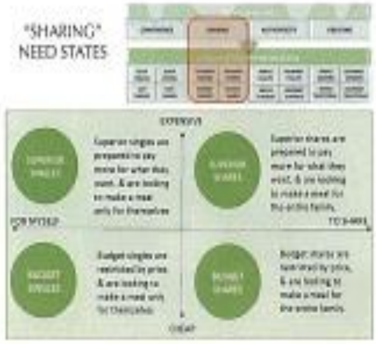

WW INDIAN SUB-CATEGORIES BY LEVEL OF INVOLVEMENT

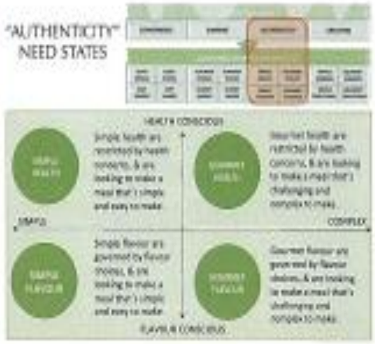

HOW DID WE CREATE OCCASION PILLARS?

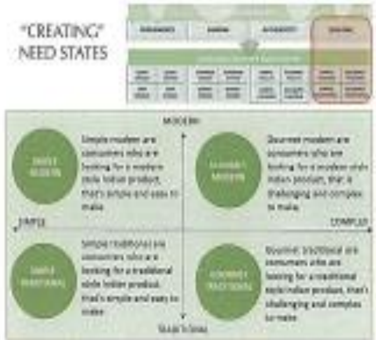

WW INDIAN CATEGORY OCCASION PILLARS


HOW DID WE CREATE CONSUMER/SHOPPER NEED STATES?


"CONVENIENCE"
NEED STATES


"SHARING"
NEED STATES


"AUTHENTICITY"
NEED STATES


"CREATING"
NEED STATES

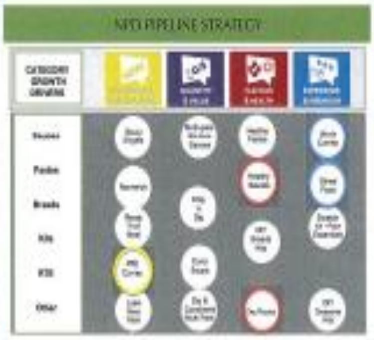

HOW DO WE CREATE CONSUMER/SHOPPER NEED STATES?
QUANTITY
& VALUE
FLAVOUR
& HEALTH


WW INDIAN CATEGORY GROWTH DRIVERS
QUANTITY
& VALUE
FLAVOUR
& HEALTH
EXPERIENCE
& PREMIUM


How do we view
other products in the supermarket
using these drivers?


How do we view
competing categories
using these drivers?


NPD PIPELINE STRATEGY


NPD PIPELINE STRATEGY
CATEGORY GROWTH DRIVERS
Sauces
Pastes
Breads
Kits
RTE
Other


CONVENIENCE NPD


QUICK SINGLES NPD


QUICK SHARES NPD


EASY SINGLES NPD
SAUCY SINGLES


EASY SHARES NPD
THAI


SHARING NPD
QUANTITY & VALUE

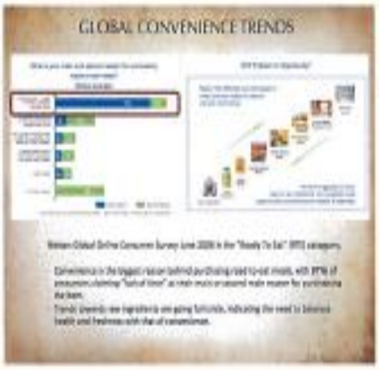

SUPERIOR SINGLES NPD
QUANTITY & VALUE


OVERVIEW


IMMEDIATE OPPORTUNITY - NPD


RTE CURRIES
Pumpkin Curry


Indian Ready Meal
What's in the range
Paneer Butter Curry
Potato Eggplant & Tomato
Pumpkin Curry
Navratan Vegetable Korma


GLOBAL CONVENIENCE TRENDS


HEALTHY BASES
FLAVOUR & HEALTH


NAKED CURRY
What's in the range
Healthy Chicken Curry Base
Healthy Beef Curry Base
Healthy Vegetable Curry Base
Healthy lamb Curry Base
Healthy Indian
All Natural
No Added Sugar
98% Fat Free
Low Sodium
Gluten Free


GLOBAL HEALTH TRENDS


DRY PACKS
FLAVOUR & HEALTH
Yellow Dhal


Indian Dhal Mix
What's in the range
Yellow Dhal
Mixed Lentil Dhal
Vegetable Biryani
Yellow Dhal


GLOBAL RAW INGREDIENTS TRENDS


WORLD CURRIES
EXPERIENCE & PREMIUM
Beef & Tamarind


What's in the range
Burmese Beef & Tamarind
Nepalese Mince Curry
Mauritian Chicken Curry
Lahori Lamb Curry
Jamaican Beef Curry
Sri Lankan Coconut Chicken
Sri Lankan Chicken Curry
Nepalese Chicken Curry
Curries of the World
Beef & Tamarind


GLOBAL LOCAL TRENDS
65% of consumers are finding recipe meal ideas online – therefore are no longer confined to just the ideas of what's in their local background, now have global inspiration.
Everything is trending to being more and more interconnected – food trends are now involving emotional, social, spiritual, and scientific dimensions. We need to view the retail food insights landscape from a local, global and multi-faceted perspective.
Increase in Australia's multiculturalism = increase need for understanding more trends.

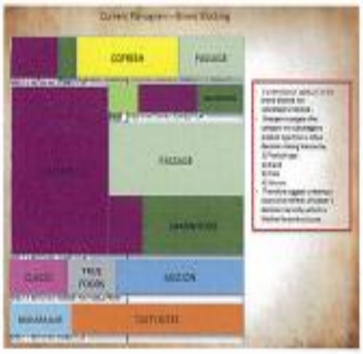

STREET FOOD
EXPERIENCE & PREMIUM
STREET KITCHEN


STREET KITCHEN
WHAT'S IN THE NAME
COCONUT CHICKEN CHETTINAD
GOAN FISH CURRY
CHICKEN MAKHANI
BEGANLI BEEF CURRY
PUNJABI CASHEW VEGETABLE KORMA
KASHMIRI CHICKEN
STREET KITCHEN - INDIAN -ASIAN - MEXICAN


GLOBAL AUTHENTICITY TRENDS
TESCO


PASSAGE FOODS NPD STRATEGY


Original Parent Layout – WW 2 Bay Indian




INDIAN CATEGORY STRATEGY SUMMARY
WHAT?
WHAT NOW?


THANK-YOU ...