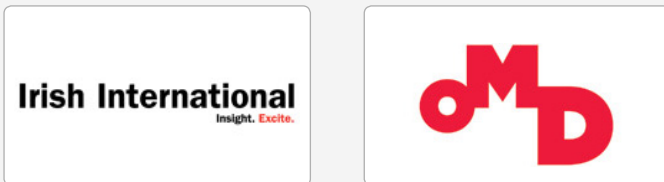


# Give it time to brew: How Ireland's longest-running brand idea helped Barry's Tea to ride out the recession

Irish International & OMD



## AGENCIES



## CLIENT



## AWARD

LONG TERM EFFECTIVENESS  
Sponsored by

SILVER



## COMPANY PROFILE

**Barry's Tea** is a family-owned tea company founded in 1901 in Cork City, where it is still based. Until the 1960s, the family sold its unique blends exclusively through its shop in Cork; through the Sixties and Seventies, its popularity and distribution grew across the country. Today, Barry's Tea commands a 38% share of the Irish market and enjoys niche distribution around the world.

**Irish International BBDO** is an advertising, shopper marketing and CRM agency in Dublin, employing 80+ people, and making winning work for local and global brands across every category. It was established in 1966, and joined the BBDO family in 1998. Barry's Tea is one of the agency's most cherished and long-standing clients, with a prolific output that stretches back to 1994.

**OMD** Worldwide has been named Global Media Agency of the Year a remarkable ten times in a row by the Gunn Report. OMD Ireland has been the media partner of Barry's Tea for many years, and has been described by the brand's marketing director as "leaders within their field, acting very much as an extension of our marketing team."

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## INTRODUCTION & BACKGROUND

In 2008, the Irish tea category was built around two pillar brands – Barry's Tea and Unilever-owned competitor, Lyon's – with any market developments largely occurring on the periphery<sup>1</sup>.

The tea category was stable and mature, with an average of 5.2 cups of tea drunk per day<sup>2</sup>.

Ireland really is a tea-drinking nation.

As such, the category was anomalous in that genuine brand loyalty existed. Much like choosing a political party, tea brands were seen as an integral part of Irish personalities. By and large you either come from a Barry's household or a Lyon's household. Even as younger generations gained their independence, they continued to fly the flag by taking the family's tea brand of choice with them. Private label brands tended to be largely disparaged and viewed as being a false economy<sup>3</sup>.

Source: Behaviour & Attitudes, Barry's Tea Advertising Research. October 2008.

The biggest category threat was that the increasingly cosmopolitan behaviour of Irish consumers meant that "on the go" hot beverages, such as coffee, were more de rigueur<sup>4</sup>, and as such the category was recruiting fewer younger consumers. As a result there were signs that the category needed to modernise to increase penetration amongst younger drinkers, but generally things were looking good.

**Suddenly, overnight, a very different Ireland came into existence.**

On 15th September 2008, Lehman Brothers collapsed and filed for bankruptcy. 48 hours later, Anglo Irish Bank approached the Central Bank of Ireland, requesting an emergency loan of €7bn.

On the 29th of that same month, the Irish Stock Exchange experienced "Black Monday", falling over 12% in one day.

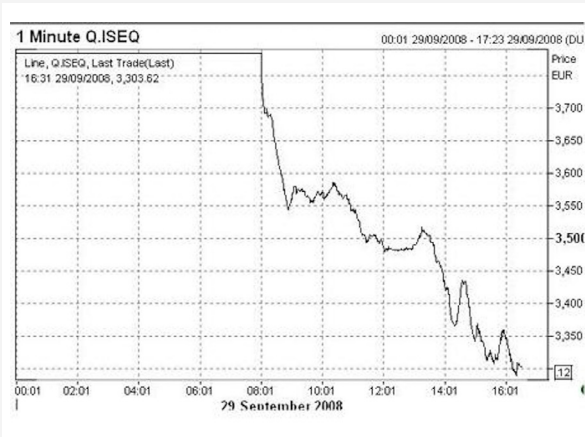
*I suppose you could say we're a Lyon's house. I can never remember anything in our house besides Lyon's, back to my Gran.*

*You get a taste for it (the tea). We've always had Barry's. It's like a family thing.*

Source: Behaviour & Attitudes, Barry's Tea Advertising Research. October 2008.

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## INTRODUCTION & BACKGROUND

The next day, Brian Lenihan - the Government's Minister of Finance - announced a bank guarantee of €440m. Ireland officially became the first eurozone country to enter recession<sup>5</sup>.

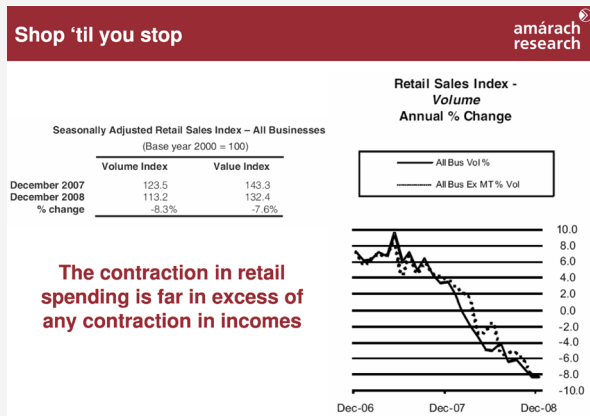
Almost overnight, the stability and economic outlook of the country took a nosedive.

Everything was in flux, and the future for Ireland, and Barry's Tea, suddenly looked a lot less rosy.

1. Nielsen Category Tracking Q3 2008.
2. Millward Brown Lansdowne Report 2009.
3. Behaviours & Attitudes Brand Health Audit 2011.
4. Behaviour & Attitudes Advertising Development Research, October 2008.
5. WSJ Ireland's Woes: <http://www.wsj.com/articles/SB10001424052748703572404575634550808491336>

# Give it time to brew: How Ireland's longest-running brand idea helped Barry's Tea to ride out the recession

Irish International & OMD



Source: *Psychology of Recession and Recovery*.  
Amarach Research. October 2009.

## MARKETING OBJECTIVES

The new economic instability very quickly escalated to something serious and sustained. In January '09, Anglo Irish Bank was formally nationalised, and on 4th February, the government announced public spending cuts of €2bn. By the end of the month, Ireland's Stock Market had lost 80% of its value versus the highs of 2007<sup>6</sup>.

Unemployment levels grew quickly<sup>7</sup>, climbing to the highest levels since the mid-1990s, and consumer confidence in a quick recovery plummeted<sup>8</sup>.

Almost immediately the impacts of the downturn translated into shifting consumer behaviours. Grocery spending contracted far in excess of income contractions, as people sought to tighten their belts and "batten down the hatches" to safeguard against further economic turbulence.

## Commercial Objectives

It was clear that Ireland was on shifting sands and that FMCG brands were in for sustained difficulty. All the signs indicated that it was going to be an aggressively challenging trading environment for Barry's Tea for some time.

A family-owned business since 1901, Barry's Tea didn't have the deep pockets to be able to bear the cost of a loss in market share (value and volume), so our primary objective was to defend, defend, defend.

Barry's Tea's market share had remained steady to the end of 2008. Ultimately the main objectives were to maintain share by holding onto value share, to weather the storm and come out on the other side in a strong position for growth.

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## MARKETING OBJECTIVES

### Marketing Objectives

To maintain profitability, marketing was focused on maintaining levels of brand affinity and minimising price sensitivity, in the face of increasing pressures to discount.

We also needed to ensure that we continued to modernise the brand (and category) in order to increase brand penetration amongst younger consumers.

### The role for communications.

The role for communications was threefold:

1. Remain a cultural icon, by sustaining high levels of brand affinity.

We needed to continue to create work that would build upon the legacy of "Golden Moments" and maintain Barry's Tea's position in the hearts of Irish tea drinkers, by focusing on building brand affinity.

2. Maximise quality cues to justify price premium.

We also needed to ensure that we constantly reinforced brand quality cues in order to minimise price sensitivity and the pervasive threat of consumers switching to promotions and/or private label.

3. Persuade the masses.

With category penetration holding strong at over 90%, we needed to create communications that would ensure that Barry's Tea appealed to consumers at a mass level. However, as younger drinkers had been straying from the category, we needed to work extra hard to recruit them. We needed communications that would bridge the traditional and modern.

6. *Psychology of Recession and Recovery*, Amarach, March 2009.

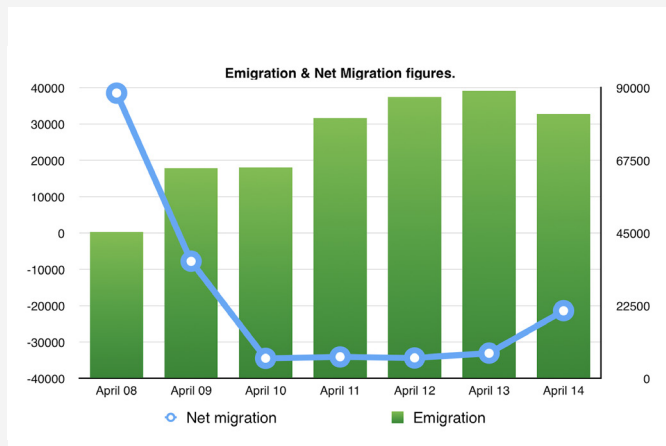
7. *ESRI.ie*

8. *Psychology of Recession and Recovery*, Amarach, March 2009.

9. Kantar WorldPanel 2008.

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## THE TASK

**As the recession deepened, trouble was brewing in the tea category.**

In 2009, public spending cuts of €15bn were announced. By early 2010 unemployment had grown from 5% to 13%, and Ireland had the highest level of outward net migration since 1989, and this continued to rise for the next three years<sup>9</sup>.

In 2011, 68% of consumers reported that they had less disposable income than in 2010, 94% were making an effort to further cut their personal spending<sup>10</sup> and 37% were dipping into their savings to cover grocery shopping<sup>11</sup>.

As the impacts of the recession grew, early recessionary behaviours evolved to become the new normal.

By mid-2010, 72% of shoppers cited price as the main reason for choosing a grocery retailer<sup>12</sup> with 88% of them claiming to know the price of everyday items such as bread, milk and a litre of petrol.

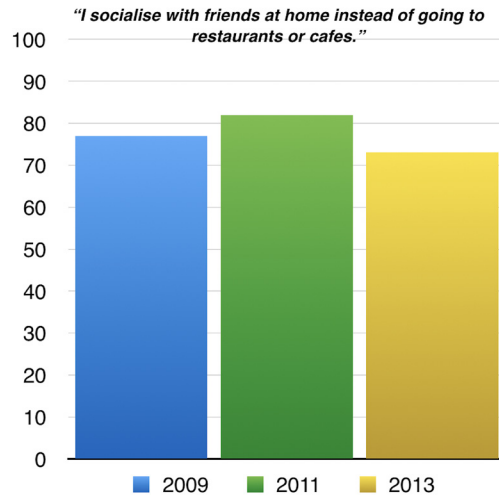
Retailers were fighting their own battles and began to offer deep price cuts across categories, initially subsidising them themselves, before putting brands under pressure to share the cost.

Consumers had come to expect discounting in store, and kept a watching eye out for deals to help them to minimise their spending. By mid-2010, 53% of shoppers admitted to taking advantage of more promotions, offers and coupons than before<sup>13</sup>.

Consumers were actively trading down in their grocery shopping and becoming increasingly open to private label alternatives to branded goods. Driven by earlier retailer price-slashing, several tea brands within the category had begun to offer frequent promotions at fixture to increase volume share of a growing category.

# Give it time to brew: How Ireland's longest-running brand idea helped Barry's Tea to ride out the recession

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Source: Bord Bia Periscope Study 2011

"I go around to my friend for tea a few mornings a week, but I bring my own Barry's. She uses Lyons and I think it's awful. I couldn't drink it, but she understands that."

- Respondent in focus groups. Brand health assessment. Behaviour & Attitudes, May 2011

## THE TASK

Between 2010 and 2015, Lyons spent an average of 60-70% of the year on promotion<sup>14</sup>, versus Barry's 25%. The temptation for consumers to switch brands grew throughout the recession - driven by promotional activity - and the door was open for private label to steal share.

As well as being able to run heavy on promotion, Lyons is owned by Unilever and as such outspends Barry's Tea by approximately 3:1 each year<sup>15</sup>.

Retailers were also our competition, as they pushed private label in order to steal share. Between 2010 and 2014, Supervalu, Lidl and Aldi all ran ATL campaigns about their own brand product.

### But there was a glimmer of hope.

The recession changed social behaviour across Ireland. During times of financial stress and difficulty, home came to signify security, safety, nurturing, family togetherness and social bonding, and we took to entertaining at home in increasing numbers.

Consumers expressed an awareness of a desire to go "back to basics" and the role of friends and community had been refocused in terms of emotional importance, with "home" taking on a renewed centrality.

The category was demonstrating some resilience – consumers were drinking more often<sup>16</sup> and were showing resistance to switching or trading down<sup>17</sup>.

With our competitors outspending us in advertising and discounting heavily, it was not a level playing field. Barry's Tea had to resist the increasing pressure to discount, to maintain value.

9. Central Statistics Office, Population and Migration Estimates, April 2009 - April 2014..

10. "Budget 2012: Closer to the Edge", Amarach Research, November 2011.

11. "Budget 2012: Closer to the Edge", Amarach Research, November 2011.

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Irish International & OMD



## THE TASK

- 12. NCA Grocery Shopping, Wave 5, August 2010.
- 13. NCA Grocery Shopping, November 2009.
- 14: TNS
- 15. Nielsen AdDynamix
- 16. Millward Brown Lansdowne 2009.
- 17. NCA Consumer Switching Study 2010.



# Give it time to brew: How Ireland's longest-running brand idea helped Barry's Tea to ride out the recession

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## THE STRATEGY

The success of the Barry's brand to date had been borne out of a dedication to building a brand through a commitment to advertising. One that had seen new entrants to the category (such as Unilever's other tea brand, Liptons) remain on the periphery of market only, despite their heavy advertising and promotional investment.

The challenge now was to do the same – resist the pressure to discount, and commit to building upon the solid bedrock that the brand's legacy of advertising had established, in order to see off the threat of Lyon's and private label.

Since 1994, the "Golden Moments" platform had delivered a cumulative, mosaic-like effect of various campaigns and executions. These had combined to form a body of work that had come to hold an almost iconic place in popular culture.

The brand's advertising was known and loved by tea drinkers in both camps – Barry's and Lyon's.

The "Golden Moments" platform had been borne out of an insight around Irish consumers' emotional connection to tea and owning the pleasure of that tea moment.

As the impacts of the recession were felt, the role of tea in people's lives was reinvigorated, and our insight was just as true as it had ever been – perhaps even more so.

However, as the broader nation changed and evolved, so too must Barry's Tea, particularly as we were keeping a watchful eye on building up our modern credentials in order to recruit younger tea drinkers to the brand.

To that end, our strategy for Barry's Tea throughout the recession and beyond was to:

**Cement** Barry's Tea's place at the heart of Irish consumers' cherished tea moments **by** rooting the brand in powerful tea moments **and** communicating the brand's quality cues, and **to** maximise brand affinity and salience **so** that we could minimise price sensitivity and retain market share.

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## THE IDEA AND COMMUNICATIONS ACTIVITY

### Creative Strategy

By moving a creative motif through two decades, always evolving to reflect the way in which Irish people were changing, Barry's Tea advertising had developed to a point of iconic status within Irish culture.

The core of this motif was to own the emotional dimension of tea drinking, defined as a golden moment.



*New York, 1997*



*Free Time, 2005*



*Something Borrowed, 2007*



*Stranger, 2007*

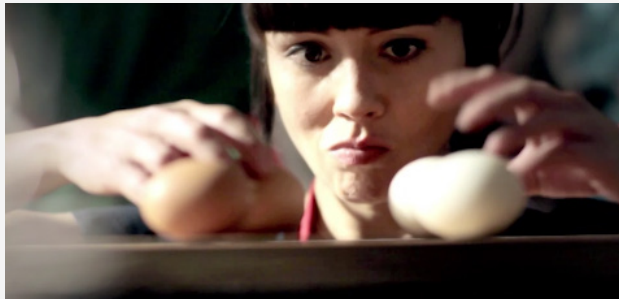
Throughout the recession, we remained committed to developing advertising that would build upon the legacy of work that had preceded it, whilst still remaining reflective of modern Ireland and all the lives of consumers.

Since 2008, we have sought to develop work that fulfils the "Golden Moments" platform by communicating the benefit of a tea moment, while always bridging traditional/modern cues.

Between 2009 and 2015, there have been three new master brand executions: Don't Forget, What's Cooking and Granddaughter.

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## THE IDEA AND COMMUNICATIONS ACTIVITY

### February 2009 - Don't Forget

During a time of economic uncertainty, "Don't Forget" depicted a young woman about to leave Ireland for a gap year. We explored the emotions that mother and daughter were experiencing; excitement on one hand and a nervousness around a child "leaving the nest". The ad culminates with the daughter enjoying a cup of her favourite tea while in Bangkok, after finding a precious box of Barry's stashed in her rucksack by her mum, with a note reminding her not to forget to come home.

### September 2011 - What's Cooking?

"Cookery School" was developed in 2011 following script research in late 2010. Staying in was the new going out for Irish consumers, and there was an emergent trend in at-home entertaining and cooking. As tea was an integral part of at-home socialising, we sought to reflect this in our newest TV commercial, with a communal occasion.

### 2014 - Teas of Real Character (Granddaughter TV)

In 2013, Ireland emerged from the recession and began to look forward with greater optimism. In research we learned that the consumer-facing expression of "Golden Moments" was beginning to wear out, though the core idea and messaging still rang true.

We developed a new consumer-facing expression - "Teas of Real Character" - that spoke to both the quality of Barry's Tea, and unlocked new ways for us to articulate and demonstrate "Golden Moments" in a more modern way - as moments full of character, in a typical traditional/modern style that is appropriate for Barry's Tea.

We also supported the new campaign with OOH depicting tea drinkers of various character, enjoying a moment with Barry's Tea.

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## THE IDEA AND COMMUNICATIONS ACTIVITY





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## THE IDEA AND COMMUNICATIONS ACTIVITY

### Names campaign

In 2010 we ran a series of OOH executions that featured the names of Irish consumers (a whole year before Coke did the same thing!), in an attempt to save off the battle that was occurring at shelf in store. Tapping into the sense of personal identity that your choice of tea is in Ireland, we told the nation that everyone could enjoy their very own golden moment.

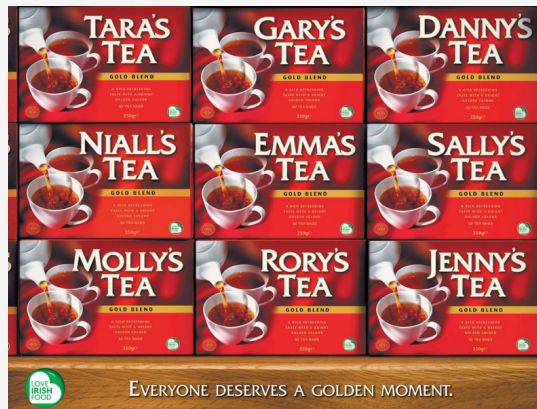
### Christmas activity

Christmas is always a peak sales period for the tea category, and another area where Barry's Tea advertising stands out. Our "Train Set" radio commercial has been running for over 20 years and is one of the nation's signifiers that Christmas is approaching.

To build on the success of the names OOH campaign, we ran a Christmas version in 2012 that featured the names of Santa and his reindeer, and ran special Christmas packs with the same names replicated.

### Quality activity

To support the brand's premium pricing, refusal to discount beyond existing levels, and to stave off competition from new category entrants (namely private label), we created several quality tea executions to run in tandem with brand advertising that called out the brand's heritage (still family owned after 115 years), commitment to craft and Irish heritage.



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## THE IDEA AND COMMUNICATIONS ACTIVITY

### Communications Strategy

Aligning Barry's brand essence of premium, contemporary and Irish was central to informing the Media Strategy and creating a platform to communicate with Barry's core target over the last several years.

Renowned for its iconic AV treatments dating back twenty plus years, the Barry's brand is synonymous with wonderful storytelling centred on 'Golden Moments' in a truly Irish way.

Recognising that this is the heartland of the brand's communication platform and a key point of differentiation over its closest competitors, the media approach focused on maximising the AV strategy, whilst utilising other media channels to further enhance our positioning and unique reach.

Whilst the media landscape has experienced unprecedented change in recent years, Barry's Tea have always been steadfast in their approach, adopting a 'brilliant basics' strand to the media planning process centred around premium, Irish, contemporary platforms.

Whilst the media channel mix has changed somewhat over recent years, it's been more evolutionary than revolutionary.

The TV strategy has always been centred on premium content, echoed by the continued 'supporting share' into RTÉ – a move that some may feel is counter intuitive given the proliferation of new UK-based channels opting out Irish audiences in a cost regulated way. However, remaining true to the brand values, RTÉ TV has remained a key partner for Barry's and very much echoes the values of the Barry's brand.

Over the years, Barry's have continually used a suite of TV copy to limit wear-out and keep the brand's on-air presence fresh and engaging. Grounded in its modern Irish heritage, Barry's also produced multiple pieces of copy voiced over in the Irish language to run on TG4 during the campaign periods.

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## THE IDEA AND COMMUNICATIONS ACTIVITY

Layered on top of our TV strategy is a mixture of national/local radio and premium OOH sites. Indeed, the iconic 'Train' ad that runs nationally on radio each Christmas period is seen as a marker in the calendar that Christmas has arrived, reinforced by the extensive PR that it continually receives during the key Christmas period. OOH's role in the mix is very much two-fold using large format premium sites to drive awareness of product lines and smaller POS formats to fulfil tactical in-store initiatives with different multiples.

Emphasising the power of the brand both locally and with the Irish diaspora, Barry's have witnessed huge success growing their social media footprint across Facebook (122k), Twitter (10k) and Instagram (2k) – organically!

Coupled with this, they have also used tactical digital display activity to complement offline activity and drive audiences to different online platforms.

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## RESULTS

After a period of stasis during the recession, when value share of market held at around 25% to 26%, the brand has shown quarter after quarter of successive growth, while the main competitor - Lyon's Tea - has maintained volume share of market.

In 2015, the tea category declined in value by 1.2% year-on-year, mainly due to volume-per-trip losses, as consumers pick up smaller packs in-store, in line with a general shift away from stock-up shopping, towards top-up shopping.

As of year end, Barry's Tea was the only tea brand in value growth with the whole category, increasing 3.3% year-on-year. Growth is largely driven by two things: we're the only brand recruiting more purchasers, and we're getting them to spend more money.

By committing to building brand health via advertising, Barry's Tea has weathered the recession and come out on the other side, in rude good health – just where the brand wanted to be.

### **How do we know Barry's advertising helped to achieve this?**

The success of Barry's Tea over the course of the last seven to eight years, as both the brand and the nation at large weathered the storm of the recession, has been down to three factors:

### **The brand was able to resist pressure to increase volume sold on promotion.**

Whereas throughout the recession Barry's Tea had steadfastly resisted both the temptation for deep discounting from retailers, and the temptation to acquire share at the price of profitability, Lyons' market penetration fell significantly year-on-year.



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## RESULTS

In addition, their sustained value losses come as the result of their heavy discounting in recent years. Throughout the recession, Lyons invested heavily in promotional activity.

Despite heavy investment in advertising to drive brand growth throughout the recession, Lyons' volume successes are now closely tied to promotional offers – they have succeeded in maintaining volume share, but at a cost to their business.

In contrast, Barry's Tea resisted an increase in promotional activity throughout the recession, instead following their strategy to invest in the brand via advertising, in an effort to retain value share and profitability for the brand. And it worked.

Throughout the recession, Barry's Tea penetration held fast but is now growing, +1.2% year-on-year. The only brand to do so.

In addition, Barry's is also currently the only brand delivering value to the market.

### **Barry's Tea achieved sustained brand power through advertising alone.**

Beyond the product itself, advertising has always been the primary means through which Barry's Tea has sought to establish a place in the hearts and minds of Ireland's tea shoppers, and as outlined in our strategy, this continued to be the modus operandi.

Our objectives for Barry's Tea were to maintain our place as a pillar brand at the heart of Irish culture, sustain quality cues to minimise price elasticity, and modernise the brand without alienating our core audience.

Throughout the recession, and into today, advertising work has consistently delivered on each of these. Sustained brand affinity to retain a place in Irish culture.

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## RESULTS

The brand now commands its highest ever NPS score and the highest within the category.

Barry's Tea's advertising throughout the recession has ensured that the brand held onto a legacy of brand affinity, and has further cemented the brand's position as an Irish brand that is reflective of the nation.

The brand is seen as being intrinsically Irish, in the most positive of ways, and is inspiring increasing levels of propensity to recommend.

And it has received ringing endorsement from some of Ireland's most internationally high-profile talent – without any prompting from the brand!



### Saoirse brews up an award...with a box of Barry's Tea

Patricia Danaher

PUBLISHED  
09/01/2016 | 02:30



Saoirse Ronan attends the W Magazine celebration of the 'Best Performances' Portfolio and the Golden Globes in Los Angeles, California. Photo: Getty

Saoirse Ronan may be an award-winning actress in Hollywood and beyond at her feet, but the 21-year-old is obsessed with tea: Barry's Tea in particular.



Last month, Saoirse was nominated for her second Golden Globe by the Hollywood Foreign Press Association (HFPA), for her luminous role as Ellis, in 'Brooklyn', the screen adaptation of Colm Tóibín's novel.

As an expression of her gratitude and ongoing love of Irish breakfast tea, she sent a box of Barry's Gold Tea to each of the 84 members of the HFPA, along with a very touching, hand-written letter, replete with drawings describing how to make the perfect cup of tea.

"There is nothing that reminds me of home more than Barry's Tea," she wrote. "So as a gesture of my sincere gratitude (to the HFPA), I wanted to share a piece of my home with you."

*Saoirse Ronan's gift to her colleagues on the set of "Brooklyn".*

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Hozier's rider on the Jimmy Fallon Show



Kodalene's social media advocacy



SoSueMe – One of the world's top digital influencers

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*"It's that kind of thing about tradition we talked about, but it's modern as well, like it's an old trade, but it looks like a modern ad."*

Source: Behaviour & Attitudes – Barry's Tea Advertising Development Research, July 2015.

Scenes such as the tattooing, the meeting of friends, the possible rift with a boyfriend all contribute to the sense of modernity and style that is inherent in the execution. In this context, the soundtrack contributes much to both appeal and tonality, but does not take over the commercial (positively, it is likened to current Hozier songs).

The primary implication for Barry's Tea advertising through 'With Just A Splash' is that the treatment adds a 'style and modernity' dimension.

Consumers can see no reason for any significant change in direction for the brand, given that it is already presenting itself as being both contemporary with an eye to tradition

Source: Behaviour & Attitudes – Barry's Tea Advertising Development Research, July 2015.

## RESULTS

Undoubtedly, this place in modern Irish culture helps to modernise the brand and recruit a younger audience, but we are also seeing recognition that our advertising is driving increased perception of Barry's Tea as a modern Irish brand.

The brand's commitment to building a strong Irish brand through advertising has enabled Barry's Tea to:

- ▶ retain value share through an economic storm, and begin to grow steadily again;
- ▶ resist the temptation to drive growth through promotion;
- ▶ become the only brand able to recruit new consumers ;
- ▶ increase affinity and generate advocacy; and
- ▶ become and remain a bedrock of modern Irish culture.

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## IMPACT ON BEHAVIOURAL ACTIVITY AND PAYBACK

In a category that is forever changed and more open to switching, we've shown that we're able to recruit without promotion – we're bucking the trend.

Although consumers have proven that they are more open than ever to switching, Barry's Tea has been able to increase loyalty.

And unlike every other brand in the category, the advertising is also justifying our price premium. Barry's Tea is the only brand driving value with the category and its quality cues are recognised by consumers. Even a price increase in 2015 did not inhibit growth.

In summary, as a result of the commitment to building the brand through advertising, Barry's Tea has weathered the storm of the worst economic crisis to face Ireland in recent years, to not only retain value share through an economic storm, but also to retain its place at the heart of modern Irish culture.

As a result, the brand is now in the enviable position of being able to recruit new drinkers whilst still commanding a price premium and Barry's Tea remains a stable, well-loved Irish brand, with many a Golden Moment to look forward to in the future.

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## NEW LEARNINGS

Throughout the recession we have learned two key things. Firstly, that constantly striving to keep pace with modern consumers is absolutely necessary, and we continue to evolve both our communication of the golden moments that the brand brings to consumers' lives, and the choice of media through which we deliver those communications.

We also learned that, when something's working for you, the best strategy is to resist going for the short-term wins at the expense of the brand, and instead focus on the long-term health of the brand.

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## SUMMARY

Faced with a recessionary collapse in consumer spending, and a main competitor hell-bent on discounting, Barry's Tea stuck with its strategy of storytelling its way into consumers' affections and emerged as the only brand in the category delivering growth - proving once and for all the commercial value of a long-term, evolving, brand-building advertising idea.