Horticulture Australia and AUSVEG.

Fresh Vegetable Consumer Segmentation.

Full Report

Prepared for The Australian Vegetable Industry
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This project has been funded by HIA Ltd using the vegetable levy and matched funds from the Australian Government.

Horticulture Innovation Australia

colmar brunton.

Contents.

Introduction.

Background

In November 2013, Colmar Brunton conducted an ad-hoc qualitative research project as part of VG12078 Project Harvest.

This research was in response to the Australian Vegetable Industry's need to understand current customer attitudes within the fresh vegetable category. Of interest were current attitudes, perceptions and buying behaviours of loose, packaged and pre-prepared fresh vegetables.

This research identified factors that influenced consumers' vegetable purchasing behaviour including life-stage, age, product knowledge, awareness, provenance, health benefits and storage information. Seven consumer attitudinal groupings were identified.

In response to the research, the Australian vegetable industry is keen to further explore these consumer attitudinal groups (segments).

This project has been funded by HIA Ltd using the vegetable levy and matched funds from the Australian Government.

Research Vision

The overall objective of this research is to provide the members of Australian vegetable industry with insights to help enable the growth of their business and increase sales among the Australian public.

Outcomes of the research include;

- Developing a fresh vegetable consumer segmentation model to identify distinct consumer groups in the market.
- Profiling these segments based on their attitudes, needs, motivations and purchasing behaviours.
- Measuring the segments based on size and value.
- Identifying potential areas for product and packaging innovation that will appeal to each segment.
- Presenting recommendations to meet consumers' needs, increase sales and support wholesale and retail negotiations.

Methodology

A five stage design was developed

This report represents the full report of all stages

1 Project Planning

Together with HIA Ltd and AUSVEG a shared vision for the research was created.

Key decision makers were engaged in the process.

2 Refine and Explore

We conducted 6 focus groups to explore consumer behaviour, understand what is required to encourage purchase of fresh vegetables and challenge the findings that emerged from the 2013 consumer research.

3 Analyse & measure

We then developed key questions to be measured and then conducted an online survey of n=1,032 Australians. The data captured provided a solid platform for development of the market segmentation.

4 Activate

Through this process four distinct consumer segments emerged. We then conducted 12 in-store shopping interviews with 3 people from each segment (n=12 interviews).

Triggers, barriers and needs for each segment were deeply explored in situ.

5 Report & Present

The results are summarised within this succinct, clear and highly visual document.

Actionable recommendations to be more relevant to each segment are described.

Who we spoke with

Refine and Explore stage: Qualitative focus groups

Qualitative fieldwork was conducted from Thursday 18th September – Tuesday 23rd September 2014

Focus groups	Location	Methodology	Age Group	General attitude to fresh vegetable purchase	N=
Group 1	Melbourne	Face to face	25 – 45 years	→ Open to trying new textures and flavours; and/or → Regularly experiment with new varieties.	6
Group 2	Sydney	Face to face	45+ years	→ Typically buys the same vegetables each week; and/or → Prepares a small repertoire of meals	7
Group 3	Brisbane	Face to face	Under 25 years (Living out of home with no children)	→ Spends very little time preparing meals; and/or → Convenience and time saving is important	6
Group 4	Adelaide/ Hobart/Perth	Face to face	25 – 45 years (Parents of young children)	→ Open to trying new textures and flavours; and/or → Regularly experiment with new varieties.	8
Group 5	Regional QLD, WA, NSW	Online	25-45 years	→ Typically buys the same vegetables each week; and/or → Prepares a small repertoire of meals	8
Group 6	Regional VIC, TAS, SA	Online	45+ years	→ Spends very little time preparing meals; and/or → Convenience and time saving is important	9
				Total number of participants	44

Who we spoke with

Analysis and Measure stage: Online survey

Quantitative fieldwork conducted from Friday 10th October – Tuesday 21st October 2014.

Total Sample		N=1032
Gender	Male	27%
	Female	73%
Age	18-24 years	10%
	25-34 years	19%
	35-44 years	19%
	45-54 years	18%
	55-64 years	16%
	65 + years	19%
Household	Single Income no Kids	26%
	Double Income no Kids	17%
	Young Families	16%
	Established Families	20%
	Empty Nesters	22%
State	New South Wales	32%
	Victoria	25%
	South Australia	8%
	Queensland	21%
	Western Australia	10%
	Tasmania	3%
	Australian Capital Territory	2%
	Northern Territory	<1%

Who we shopped with

Activate stage: In-store interviews

Qualitative fieldwork was conducted from Wednesday 3rd December – Friday 5th December 2014

Segment	Store type	Location	Age Group	Gender	Household/Life stage
Eager Explorer	Coles	Metro	35-44 years	Female	Single with no children
Eager Explorer	Coles	Regional	35-44 years	Female	Single with children
Eager Explorer	Local Green Grocer	Metro	55-64 years	Female	Single with no children
Flavour Follower	Fresh Market	Metro	25-34 years	Male	Single with no children
Flavour Follower	Coles	Metro	55-64 years	Female	Single with no children
Flavour Follower	Coles	Metro	35-44 years	Male	Couple with children
Wholesome Habits	Coles	Regional	35-44 years	Female	Couple with no children
Wholesome Habits	Coles	Metro	45-54 years	Female	Single with children
Wholesome Habits	Local Green Grocer	Metro	55-64 years	Female	Single living with daughter and granddaughter
Conscious Improver	Woolworths	Metro	25-34 years	Female	Couple with children
Conscious Improver	Woolworths	Metro	35-44 years	Female	Couple with children
Conscious Improver	Aldi	Metro	55-64 years	Female	Empty Nester
Total number of participants					12

In summary.

Fresh Vegetable Buyers

Key insights: Behaviours, Attitudes and Future Opportunities

1. On average, people grocery shop 2-3 times a week

2. Of more than 100 vegetable commodities available, people only buy about 17 regularly

3. Eating vegetables is mostly limited to dinner time

4. Fresh vegetables are thought to be expensive, but surprisingly good value for money once the receipt is interrogated

5. Negative memories of traditional vegetables create a barrier to future purchase

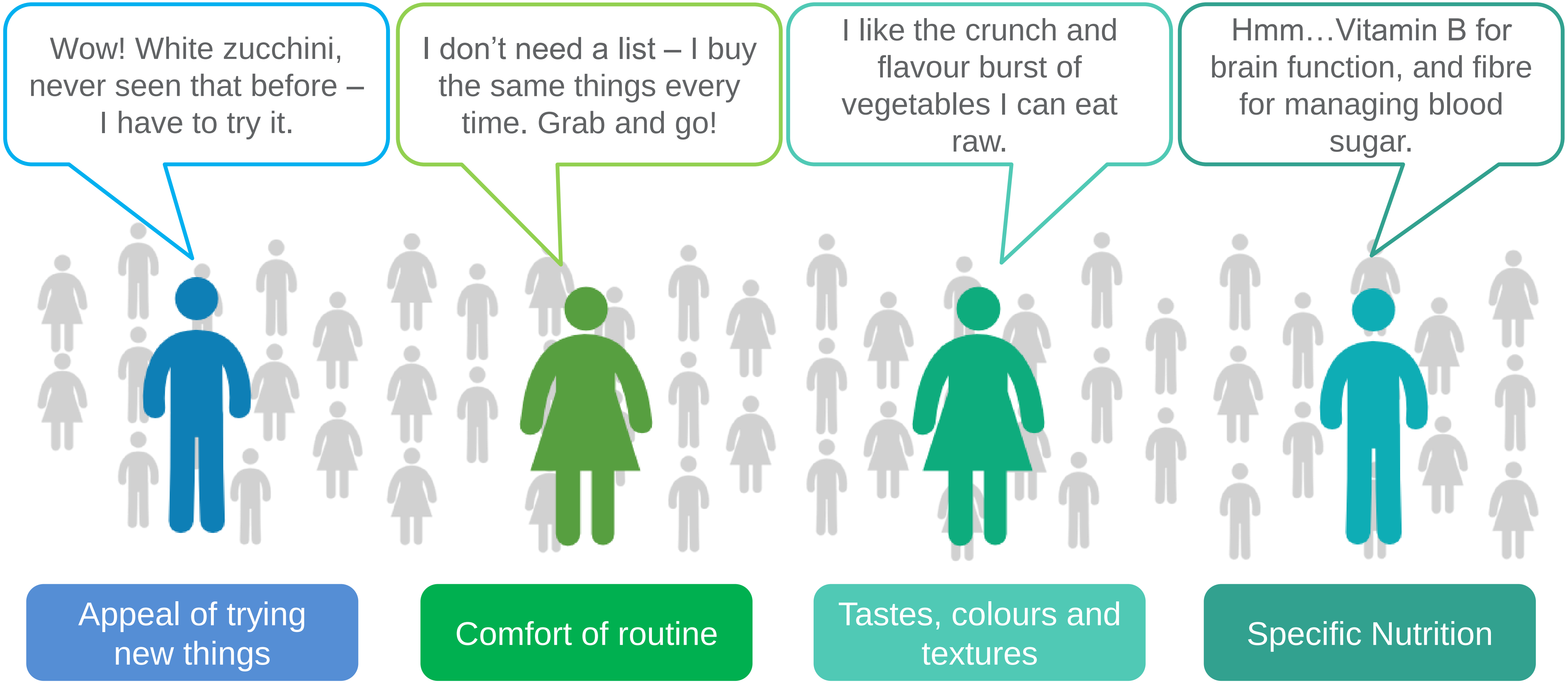
6. People have triggers that will encourage greater purchase. However, there is not one clear solution for all

To do list

Opportunities exist to:

1. Better engage with grocery buyers multiple times per week to increase veggie consumption.
2. Increase awareness of commodities to extend purchasing repertoires.
3. Trigger ideas for eating occasion at lunch time & snack times.
4. Reinforce the messages of affordability and value for money to debunk common misconceptions.
5. Relaunch and reinvent traditional vegetables to excite a new generation and be relevant to new cooking, eating and cuisine trends.
6. Deliver to the distinct triggers that drive purchase – taste, health, comfort of routine or experimental / trying new things.

Four key drivers influence consumers’ fresh vegetable preference and purchase



Wow! White zucchini, never seen that before – I have to try it.

I don’t need a list – I buy the same things every time. Grab and go!

I like the crunch and flavour burst of vegetables I can eat raw.

Hmm…Vitamin B for brain function, and fibre for managing blood sugar.

Appeal of trying new things

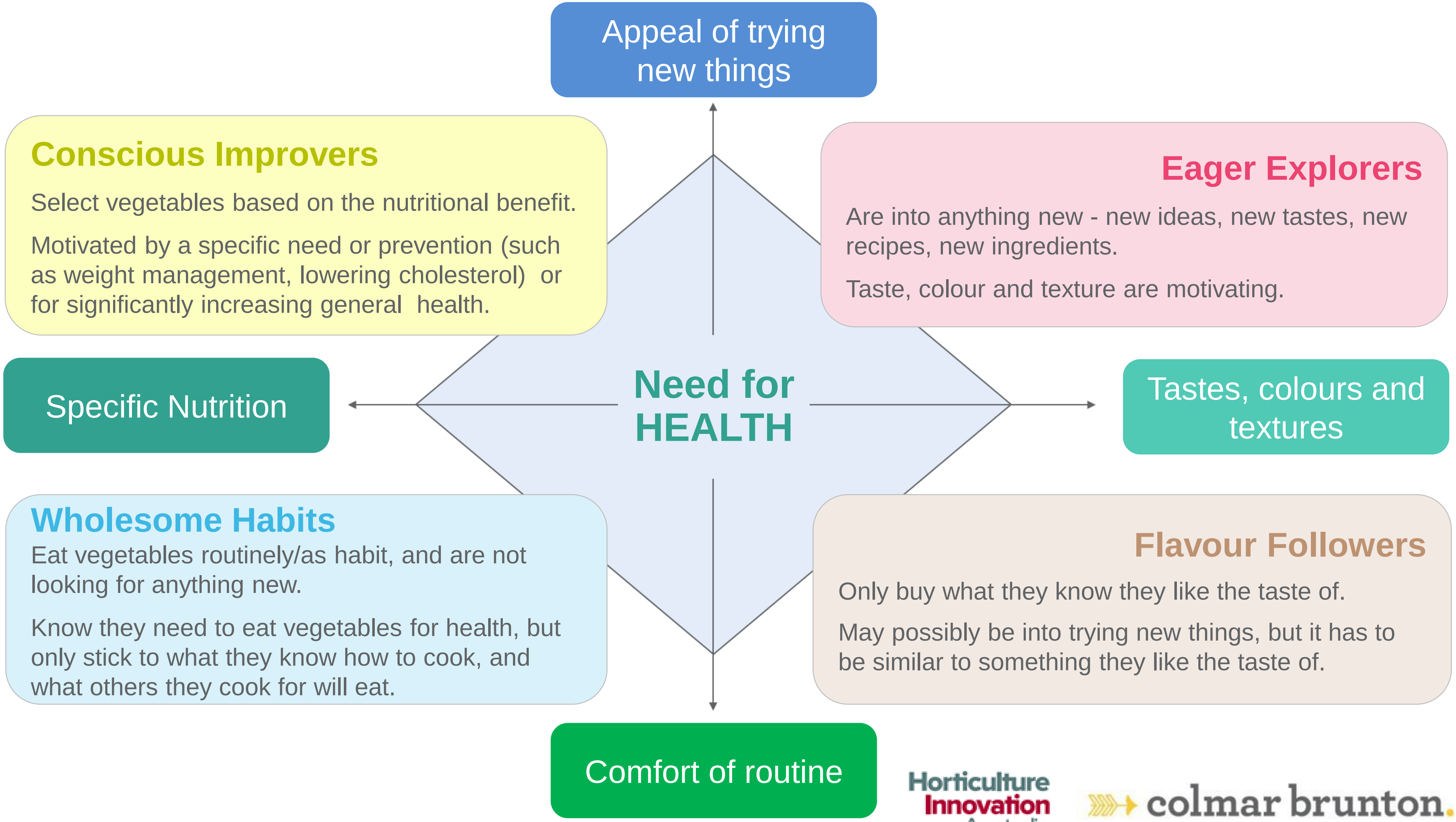
Comfort of routine

Tastes, colours and textures

Specific Nutrition

The result is four distinct segments of consumers in the market place

The segment names reflect behaviours and core needs



Appeal of trying new things

Conscious Improvers

Select vegetables based on the nutritional benefit.

Motivated by a specific need or prevention (such as weight management, lowering cholesterol) or for significantly increasing general health.

Eager Explorers

Are into anything new - new ideas, new tastes, new recipes, new ingredients.

Taste, colour and texture are motivating.

Specific Nutrition

Need for HEALTH

Tastes, colours and textures

Wholesome Habits

Eat vegetables routinely/as habit, and are not looking for anything new.

Know they need to eat vegetables for health, but only stick to what they know how to cook, and what others they cook for will eat.

Flavour Followers

Only buy what they know they like the taste of.

May possibly be into trying new things, but it has to be similar to something they like the taste of.

Comfort of routine

Segment sizes are relatively consistent and reflect market spend

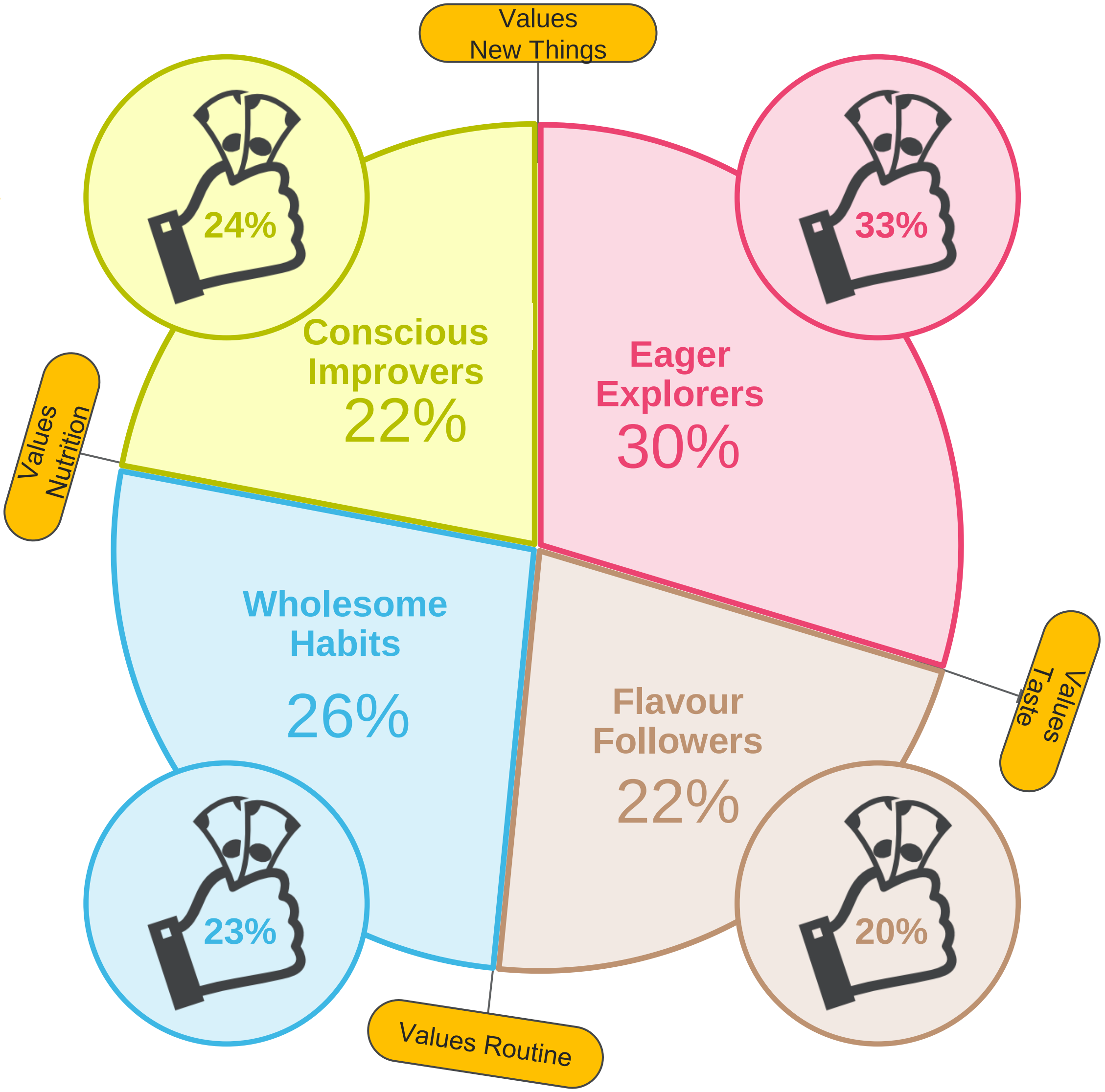
!

What appeals to one segment may not interest other segments. Each segments' needs must be addressed to be relevant and motivate purchase of fresh vegetables.

Eager Explorers represent the largest segment of the market. This means that nearly 1 in 3 consumers are seeking new tastes, colours, textures and ingredients.

People seeking 'new things' make up half of the market and spend slightly more relative to their segment size.

Wholesome Habits & Flavour Followers are conservative in the fresh vegetable choices they make and their spend.



Each segment requires specific information about vegetable commodities to motivate purchase

All are motivated by, attracted to and looking for different things

Eager Explorers

How they are behaving:

Alert in-store, looking for new ideas all the time, aware of new introductions and celebrity endorsed offers, seeking new flavours, ideas and experiences.

Be more relevant by:

Offering tastings and demonstrations on the spot to encourage trial.

Flavour Followers

How they are behaving:

Can be influenced by new packaging or formats of vegetables they are familiar with, searching for flavours to go with their regular buys.

Be more relevant by:

Offering recipe ideas in-store to highlight the versatility of the vegetables they know and enjoy.

Wholesome Habits

How they are behaving:

Very considered in-store, price and value sensitive, keen not to waste (so buy less), browse the same aisles each week.

Be more relevant by:

Offering more alternatives to their set menus, greater convenience and value options.

Conscious Improvers

How they are behaving:

Willing to spend the time and money in-store to buy the best nutritional ingredients. Looking for new ways to offer the best of nutrition to their families, understand the importance of freshness.

Be more relevant by:

Providing specific nutritional information and health benefits (RDI) in-store.

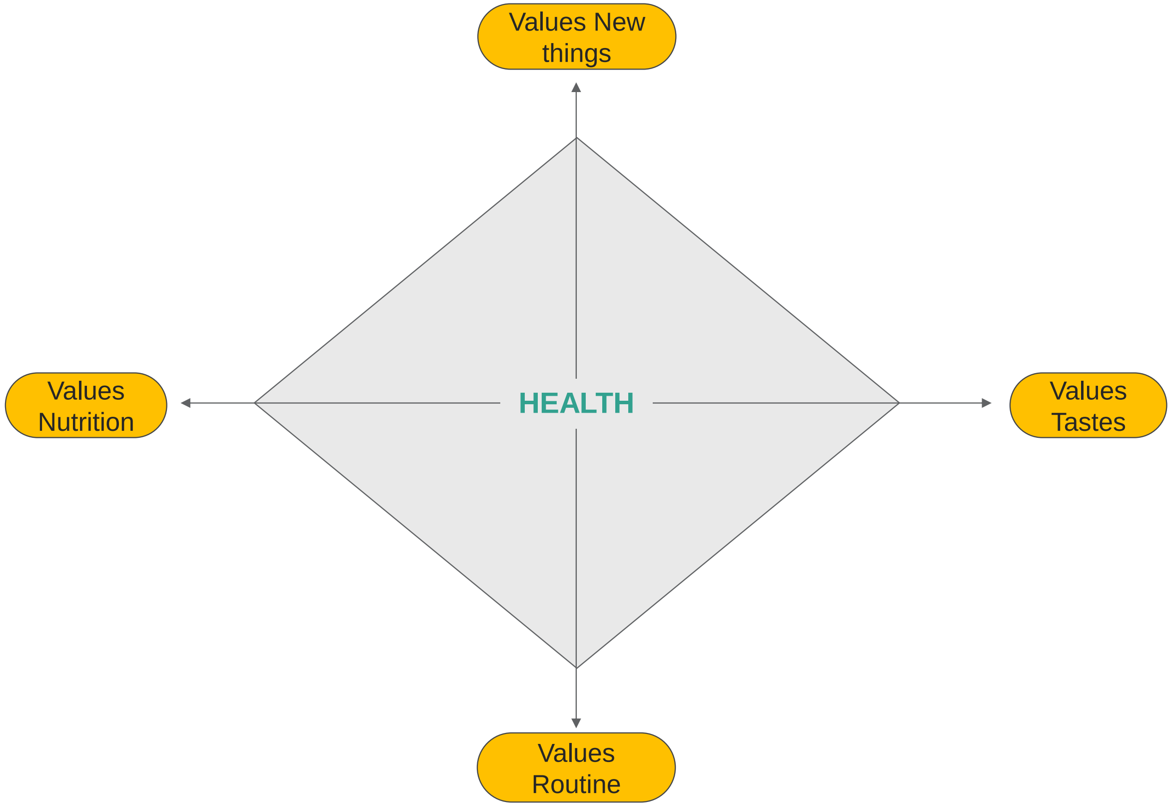
Fresh Vegetable Consumer Segmentation – Building the Model.

Segmenting Fresh Vegetable Buyers

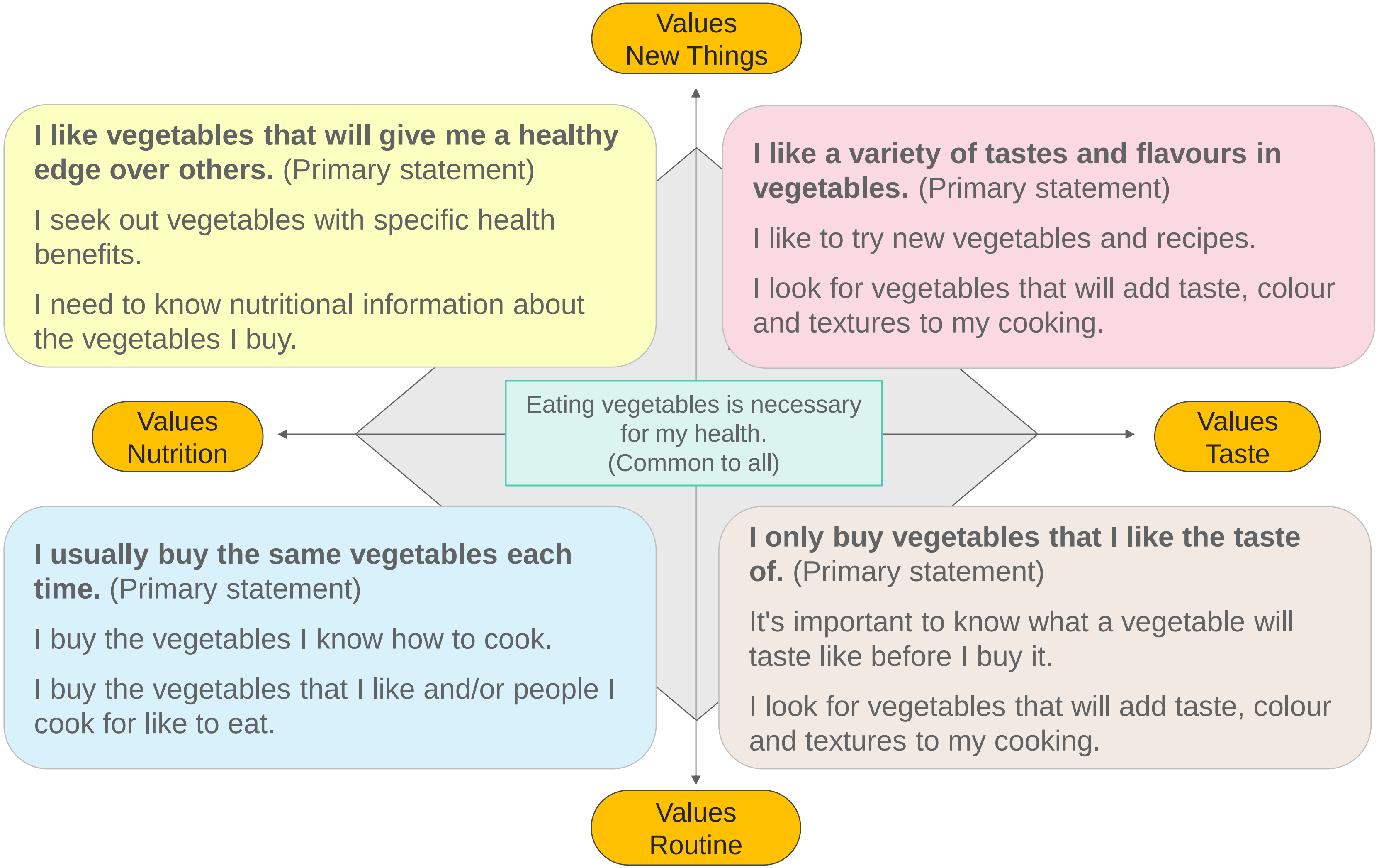
Attitudinal segmentation

Each consumer segment expresses distinct attitudes to fresh vegetables, and have different triggers, needs and attributes that motivate purchase.

- Findings from the qualitative investigation led to the development of attitudinal statements to define vegetable buyers.
- Using quantitative techniques, segments were validated and refined.
- All vegetable buyers are driven by a motivation for health (centre).
- The primary drivers of the segmentation model are continuums that relate to:
  - The value of ‘New Things’ vs. ‘Routine’ (top to bottom)
  - The value of ‘Nutrition’ vs. ‘Taste’ (left to right)



Consumers in each segment have distinct attitudes towards vegetables, with all segments believing that ‘eating vegetables is necessary for my health’



Values New Things

I like vegetables that will give me a healthy edge over others. (Primary statement)

I seek out vegetables with specific health benefits.

I need to know nutritional information about the vegetables I buy.

I like a variety of tastes and flavours in vegetables. (Primary statement)

I like to try new vegetables and recipes.

I look for vegetables that will add taste, colour and textures to my cooking.

Values Nutrition

Eating vegetables is necessary for my health. (Common to all)

Values Taste

I usually buy the same vegetables each time. (Primary statement)

I buy the vegetables I know how to cook.

I buy the vegetables that I like and/or people I cook for like to eat.

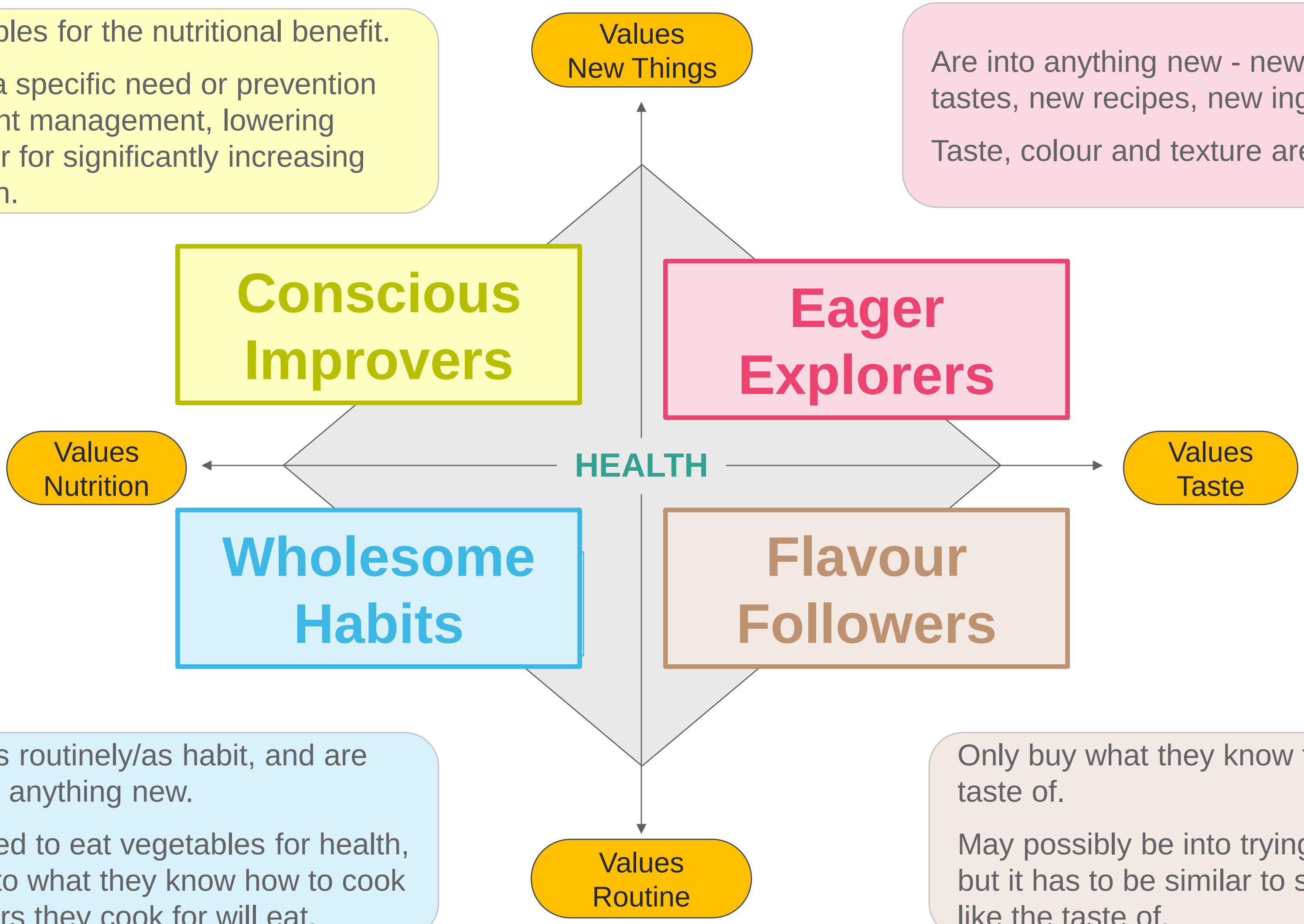
I only buy vegetables that I like the taste of. (Primary statement)

It's important to know what a vegetable will taste like before I buy it.

I look for vegetables that will add taste, colour and textures to my cooking.

Values Routine

The segments are named to reflect behaviours and core needs



Select vegetables for the nutritional benefit.

Motivated by a specific need or prevention (such as weight management, lowering cholesterol) or for significantly increasing general health.

Values
New Things

Are into anything new - new ideas, new tastes, new recipes, new ingredients.

Taste, colour and texture are motivating.

Conscious Improvers

Eager Explorers

Values
Nutrition

HEALTH

Values
Taste

Wholesome Habits

Flavour Followers

Eat vegetables routinely/as habit, and are not looking for anything new.

Know they need to eat vegetables for health, but only stick to what they know how to cook and what others they cook for will eat.

Values
Routine

Only buy what they know they like the taste of.

May possibly be into trying new things, but it has to be similar to something they like the taste of.

Meet the Segments – Eager Explorers

Larissa

23 year old student
Lives in a share house

- Larissa's ideal weekend would be settling down in her favourite café, reading the newspaper, finding a new recipe and heading to the market to get the ingredients. And all the better if it calls for a vegetable she has never cooked before!
- With Summer approaching, knowing that an ingredient will add bright colour, a crunchy texture and fresh flavours really appeals. But a few months ago it was beautiful soups and slow cooked spicy curries.
- She considers watching Food Safari and reading Gourmet Traveller magazine as special, indulgent 'me' time. Cooking foods from other countries is her way of compensating for the fact that her student income doesn't allow her to travel yet.
- Recipes for raw snack foods would encourage her to buy a larger quantity of vegetables and eat vegetables more often. A perfect opportunity to increase the vegetables she eats that fits with her lifestyle.
- Spending time at markets talking to producers, and in cafés talking to chefs about their menus could encourage her to add new ingredients to her regular repertoire.

> *I love cookbooks. I have cookbooks by the score and I love going through them and looking for recipes that introduce new vegetables; I'm very much open to trying new things.(Sydney)*

Eager Explorers 30%

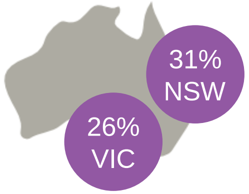
Who am I? What do I do?

25%

75%

18-24 y.o	25-34 y.o	35-44 y.o	45-54 y.o	55-64 y.o	65+ y.o
7%	18%	21%	18%	17%	20%

24%
Single Income,
No Kids



$142.7 pw
Spend on
Groceries

$33.0 pw
Spend on
Vegetables

Purchase Location

Woolworths	Coles	Local Green Grocer
60%	58%	47%

Dietary Requirements

None	Weight Management	Vegetarian
75%	9%	7%

Magazines

Better Homes and Gardens	The Australian Women's Weekly	delicious. magazine
18%	11%	9%

Lifestyle TV Shows

MasterChef	MKR My Kitchen Rules	Jamie Oliver
37%	36%	30%

Websites

Facebook	taste.com.au	ebay	YouTube	Australian Government Bureau of Meteorology
55%	32% ▲	31%	31%	26%

What do I purchase and consume?

Canned	Frozen	Dehydrated	Fresh only
49%	82% ▲	7%	12%

Fresh Vegetable Formats

Loose	Pre-packed	Pre-prepared
92%	16%	6%

8.3 Consumption occasions per week

2.7 Visits to grocery stores per week

Consumption Occasion and Location

Weekday Dinner	Weekend Dinner ▲	Weekday Lunch ▲
93%	85%	61%

Home	Work ▲	Restaurant
96%	26%	24%

Regular Purchase

Mean **19.7** vegetables regularly purchase

Tomato	Potato	Carrot	Lettuce	Broccoli
91%	91%	89%	82%	78%

▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

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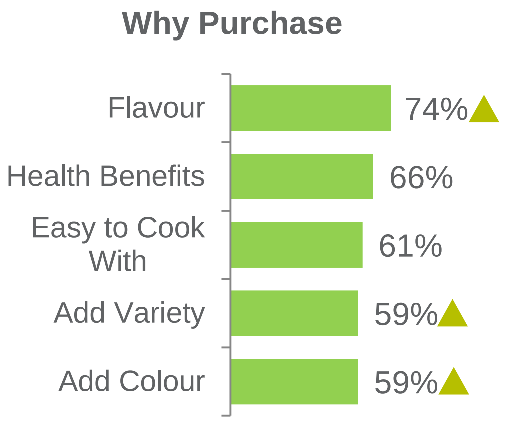
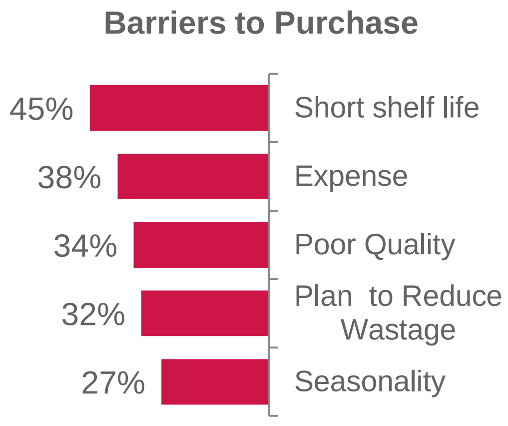
Eager Explorers 30%

How can I buy more?





42% Harvest Date

39% Location Grown

36% Increase Shelf Life

32% Recipe Ideas

28% Cooking Information

More Fresh Vegetables

New ways to cook/use ▲ 50%

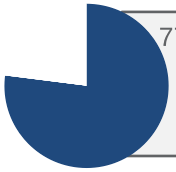
Add to meals 37%

Inspiration new recipes ▲ 37%

Value for money ▼ 35%

Encourage Consumption

87% want it to bring something new and exciting ▲



77% want to know the taste, texture and flavour it would add

Try New Vegetable

What am I interested in?

57%▲ Cook Books

47% Family, Friends

32% TV Shows

31%▲ Magazines

30%▲ In-store Displays

Recommendations

Freshness 82%

Quality 77%

Value for Money 62%

Price 57%

Taste 52%

In-store

51% Healthy

29% Fresh

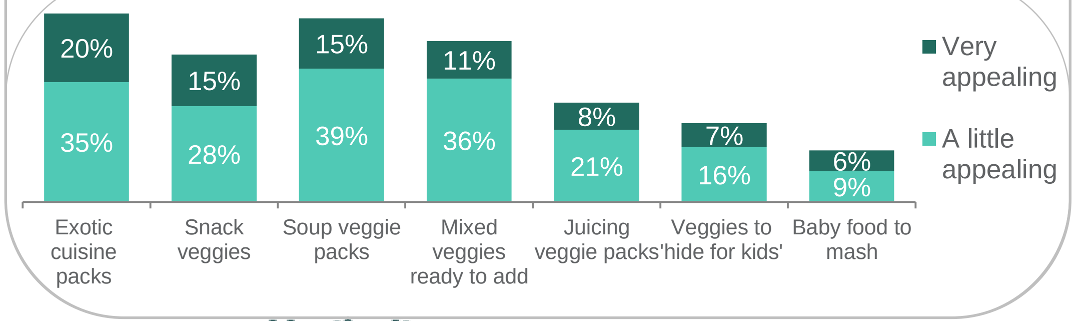
21% Organized

19% Responsible

12% Confident

How I feel

NPD Ideas



▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

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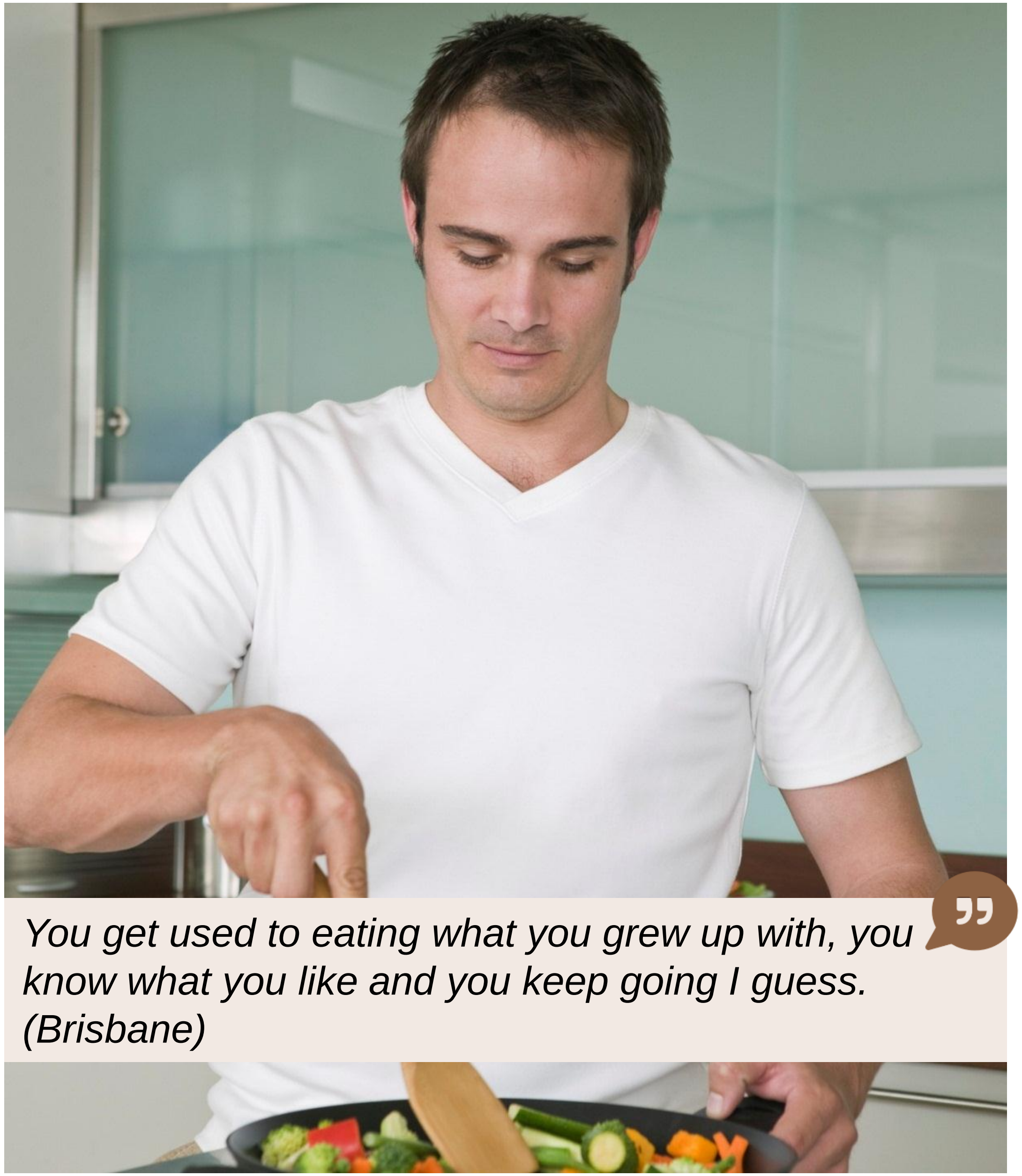
Meet the Segments – Flavour Followers

Paul

32 years old
Single, lives alone

- Paul wouldn't describe himself as a cook, but since he moved out of home 5 years ago he thinks his cooking skills are now pretty good.
- All his meals centre around meat. Steak, burgers, and chops are what he grew up with and still enjoys. About 4 nights a week he'll add some vegetables on the side. Usually potato, carrots and frozen peas. It's not that he doesn't like vegetables, they just don't fill him up. But he knows he should eat them.
- When he's really hungry he pops around to his mum's for Sunday roast. Roast vegetables are the exception to the rule, he eats them until he is full.
- At restaurants he sticks with what he likes too. There is nothing like a steak cooked by a chef. He is not intrigued or tempted by talk of quinoa and kale.
- Paul could be encouraged to include more vegetables in his diet by learning how the ones he likes can fill him up. A recipe card for 'roast veggie salad' attached to his bag of potatoes would appeal to him. He wouldn't naturally think of taking it to work for lunch, so it would have to be suggested as a good idea.



> *You get used to eating what you grew up with, you know what you like and you keep going I guess. (Brisbane)*

Flavour Followers 22%

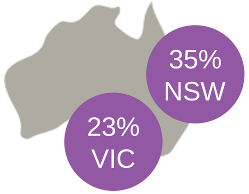
Who am I? What do I do?

26%

74%

12%	17%	16%	19%	18%	18%
18-24 y.o	25-34 y.o	35-44 y.o	45-54 y.o	55-64 y.o	65+ y.o

29%
Single Income,
No Kids



$128.6 pw
Spend on
Groceries

$28.2 pw
Spend on
Vegetables

Purchase Location

Woolworths	coles	Local Green Grocer
65%	58%	47%

Dietary Requirements

75%	10%	5%
None	Weight Management	Lactose/ Dairy Free

Magazines

Better Homes and Gardens	The Australian Women's Weekly	House & Garden
14%	11%	7%

Lifestyle TV Shows

MasterChef	Jamie Oliver	MKR My Kitchen Rules
31%	28%	27%

Websites

Facebook	YouTube	ebay	taste.com.au	ninemsn
53%	39%	34%	22%	22%

What do I purchase and consume?

Canned	Frozen	Dehydrated	Fresh only
46%	75%	4%	17%

Fresh Vegetable Formats

Loose	Pre-packed	Pre-prepared
86%	12%	8%

7.1 Consumption occasions per week

2.4 Visits to grocery stores per week

Consumption Occasion and Location

Weekday Dinner	Weekend Dinner	Weekday Lunch
94%	81%	51%

Home	Work	Restaurant ▼
97%	19%	16%

Regular Purchase

Mean **16.6** vegetables regularly purchase

Carrot	Tomato	Potato	Lettuce	Broccoli
90%	88%	85%	82%	73%

▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

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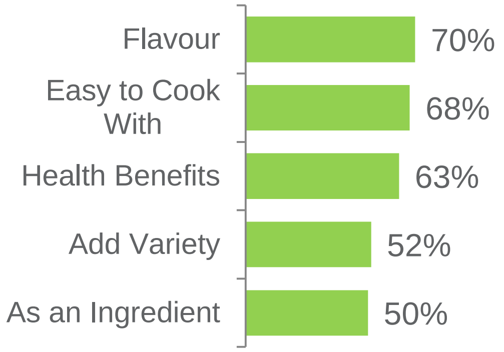
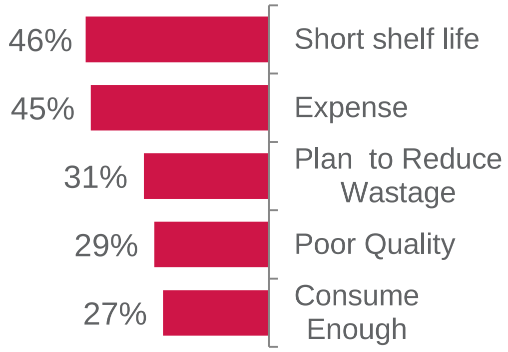
Flavour Followers 22%

How can I buy more?

Why Purchase



Barriers to Purchase



39% Recipe Ideas	39% Increased Shelf Life	38% Harvest Date	34% Location Grown	27% Cooking Information

More Fresh Vegetables

Value for money 46%

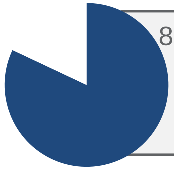
Add to meals 41%

New ways to cook it 40%

How to store 28%

Encourage Consumption

61% want it to bring something new and exciting



82% want to know the taste, texture and flavour it would add ▲

Try New Vegetable

What am I interested in?

53% Family, Friends	43% Cook Books	28% TV Shows	24% Magazines	23% Websites

Recommendations

Freshness 81%

Quality 80%

Price 67%

Value for Money 67%

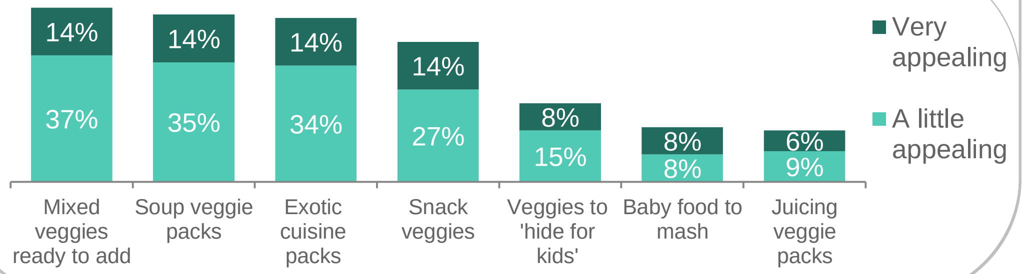
Taste 51%

In-store

52% Healthy	30% Fresh	22% Responsible	15% Organised	12% Relaxed

How I feel

NPD Ideas



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Meet the Segments – Wholesome Habits

Maria

67 years old, married
Children have left home

- Maria loves to cook. Now that her family has grown up and left home she misses the opportunity to cook large family meals every night. She just cooks for herself and her husband Joe now.
- Maria doesn't formally plan her menu, but when she thinks about it, she tends to cook the same meals most weeks. Sausages and mash, lamb chops and veg, spaghetti bolognaise and meatloaf are almost guaranteed to be served every week. And a roast on Sunday if the kids come around.
- Maria often watches Masterchef, or Better Homes and Gardens, and is interested to see what the chefs are cooking. It all looks delicious and interesting. But with just her and Joe at home, she wonders what the point of trying something new would be. She worries Joe wouldn't like it, or it wouldn't turn out right, and it would be a waste of food and money. Better to stick with what she does well.
- Recipe cards at the supermarket that promote roast sweet potato or roast swede could encourage Maria to try something new the next time the kids come around. But it would have to be displayed right near the Desiree potatoes she is focussed on buying, because she is not on the look out for new ideas.

> *I see fancy things like Rainbow Chard in the shops but don't know how to cook it or what to do, so I just steer clear of it and generally stay with what I know. (Brisbane)*

Wholesome Habits 26%

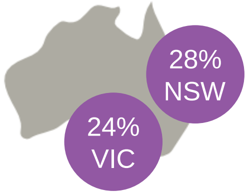
Who am I? What do I do?

26%

74%

9%	18%	23%	20%	12%	18%
18-24 y.o	25-34 y.o	35-44 y.o	45-54 y.o	55-64 y.o	65+ y.o

27% Single Income, No Kids



$133.9 pw Spend on Groceries

$26.7 pw Spend on Vegetables

Purchase Location

Woolworths	coles	Local Green Grocer
65%	58%	47%

Dietary Requirements

None	Weight Management	Gluten Free
79%	6% ▼	5%

Magazines

The Australian Women's Weekly	that's life!	Woman's Day
11%	11%	7%

Lifestyle TV Shows

MKR My Kitchen Rules		Jamie Oliver
30%	24% ▼	24%

Websites

f	ebay	YouTube	taste.com.au	Outlook.com Hotmail
61%	34%	34%	22%	21%

What do I purchase and consume?

Canned	Frozen	Dehydrated	Fresh only
43%	77%	3%	18%

Fresh Vegetable Formats

Loose	Pre-packed	Pre-prepared
87%	15%	10%

6.6 Consumption occasions per week

2.4 Visits to grocery stores per week

Consumption Occasion and Location

Weekday Dinner	Weekend Dinner	Weekday Lunch
90%	75%	45%

Home	Restaurant	Work
98%	21%	17%

Regular Purchase

Mean **14.8** vegetables regularly purchase

Carrot	Tomato	Potato	Lettuce	Broccoli
88%	86%	86%	74%	72%

▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

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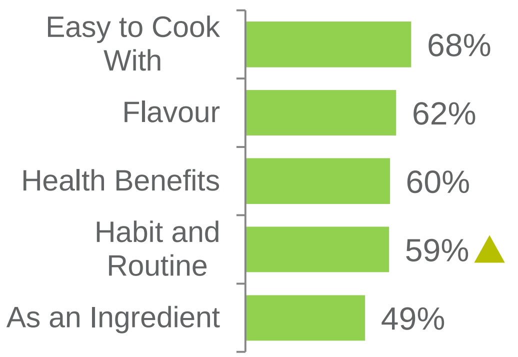
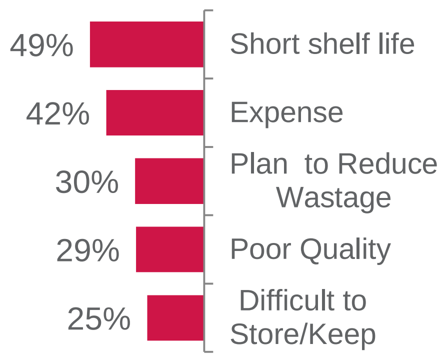
Wholesome Habits 26%

How can I buy more?

Why Purchase



Barriers to Purchase



48% ▲
Increased Shelf Life

37%
Harvest Date

35%
Recipe Ideas

32%
Location Grown

30%
Cooking Information

More Fresh Vegetables

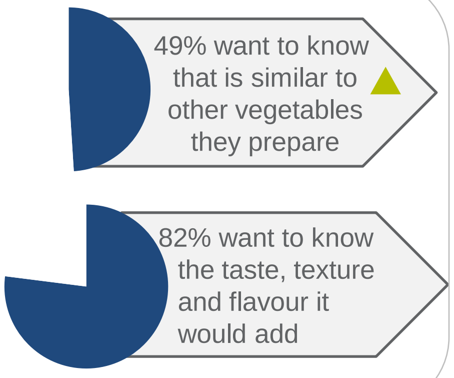
Value for money
46%

Add to meals
43%

New ways to cook it
43%

How to store
31%

Encourage Consumption



49% want to know that is similar to other vegetables they prepare ▲

82% want to know the taste, texture and flavour it would add

Try New Vegetable

What am I interested in?

52%
Family, Friends

36% ▼
Cook Books

26%
TV Shows

25%
In-store Displays

18% ▼
Magazines

Recommendations

Freshness 82%

Quality 75%

Price 67%

Value for Money 67%

Country of Origin 40%

In-store

60%
Healthy

32%
Fresh

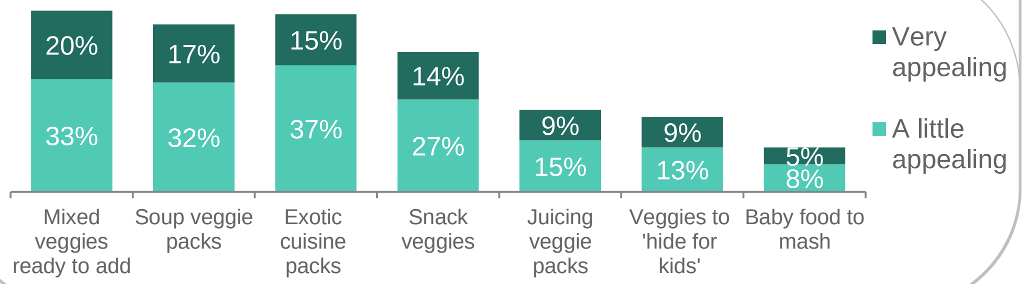
26%
Responsible

22%
Organised

12%
Down to Earth

How I feel

NPD Ideas



▲ Significantly HIGHER compared to total sample at 95% confidence.

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Meet the Segments – Conscious Improvers

Angela

43 years old
Mother of two teenagers

- Angela's diet has changed dramatically over the years. Her father has been diagnosed with diabetes and her teenage girls are really conscious about the way they look. So she made a conscious decision for herself and those around her to become more healthy.
- Angela reads Women's Health magazines, and the articles often prompt her to find out more about particular foods and vitamins.
- She has bought a juicer and has got the whole family making vegetable juices for breakfast.
- She has learned a lot about the best meats, vegetables and grains for her body and needs. And really does feel better for it.
- Angela is very open to buying new varieties of vegetables. Her ears prick up at the mention of a new 'Superfood' and she Googles how to prepare it. The challenge for Angela is finding out where she can buy it.
- She could be encouraged to eat vegetables on more occasions throughout the day. Recently she read about the benefits of dehydrating vegetables. What Angela now needs to know is, of all the vegetables she regularly buys, which would be the best to dehydrate and what the specific benefit is.

A year ago I was putting on weight, but I was eating quite well. I saw a dietician and we really looked at what I ate. It's made me aware of what my body needs and how it works. (Brisbane)

Conscious Improvers 22%

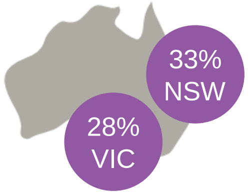
Who am I? What do I do?

34%

66%

11%	22%	16%	16%	17%	18%
18-24 y.o	25-34 y.o	35-44 y.o	45-54 y.o	55-64 y.o	65+ y.o

22% Established Families



$136.3 pw Spend on Groceries

$32.5 pw Spend on Vegetables

Purchase Location

coles	Woolworths	Local Green Grocer
58%	57%	49%

Dietary Requirements

None	Weight Management	Vegetarian
68%	15% ▲	7%

Magazines

Better Homes and Gardens	The Australian Women's Weekly	House & Garden
15%	13%	10% ▲

Lifestyle TV Shows

MasterChef	Jamie Oliver	MKR My Kitchen Rules
35%	30%	27%

Websites

Facebook	ebay	YouTube	taste.com.au	Outlook.com Hotmail
61%	34%	34%	22%	21%

What do I purchase and consume?

Canned	Frozen	Dehydrated	Fresh only
35% ▼	70% ▼	4%	24% ▲

Fresh Vegetable Formats

Loose 91%

Pre-packed 16%

Pre-prepared 7%

7.7 Consumption occasions per week

2.7 Visits to grocery stores per week

Consumption Occasion and Location

Weekday Dinner	Weekend Dinner	Weekday Lunch
89%	78%	46%

Home	Restaurant	Family/ Friends house
98%	25%	19%

Regular Purchase

Mean **17.0** vegetables regularly purchase

Carrot	Tomato	Potato	Broccoli	Lettuce
88%	88%	82%	76%	75%

▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

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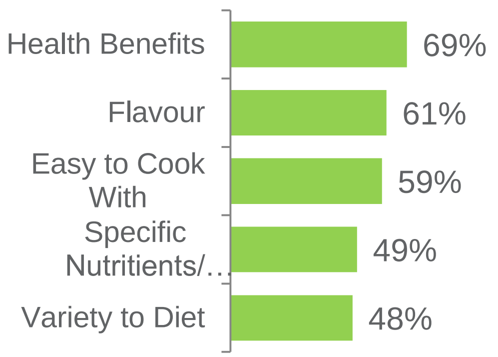
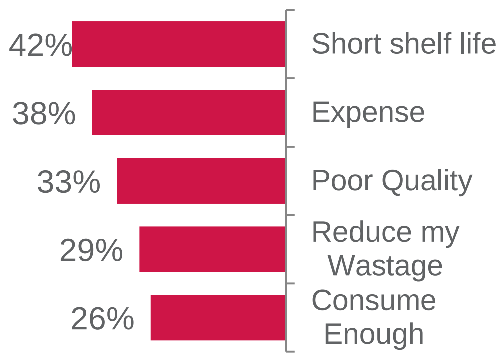
Conscious Improvers 22%

How can I buy more?

Why Purchase



Barriers to Purchase



42%
Harvest Dates

37%
Recipe Ideas

37%
Location Grown

33%
Increase Shelf Life

32% ▲
Health Benefits

More Fresh Vegetables

Value for money
40%

Add to meals
39%

Specific ▲ health befits
37%

New ways to cook it ▼
36%

Encourage Consumption

70% want it to bring something new and exciting

52% want to know the specific health benefits ▲

Try New Vegetable

What am I interested in?

50%
Cook Books

46%
Family, Friends

25%
Magazines

23%
Restaurants

23%
TV Shows

Recommendations

Freshness
78%

Quality
69%

Price
63%

Value for Money
54% ▼

Health Benefits
46% ▲

In-store

56%
Healthy

30%
Fresh

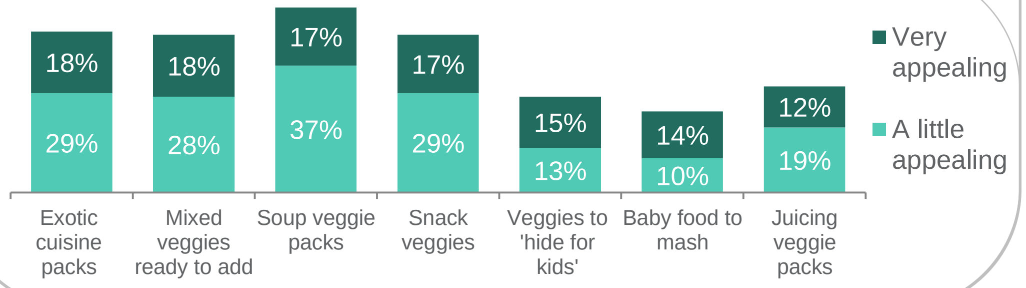
22%
Responsible

14%
Organised

13%
Down to Earth

How I feel

NPD Ideas



▲ Significantly HIGHER compared to total sample at 95% confidence.

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Usage and Behaviour.

Grocery buyers are shopping almost three times a week

On more than one occasion they are buying fresh vegetables

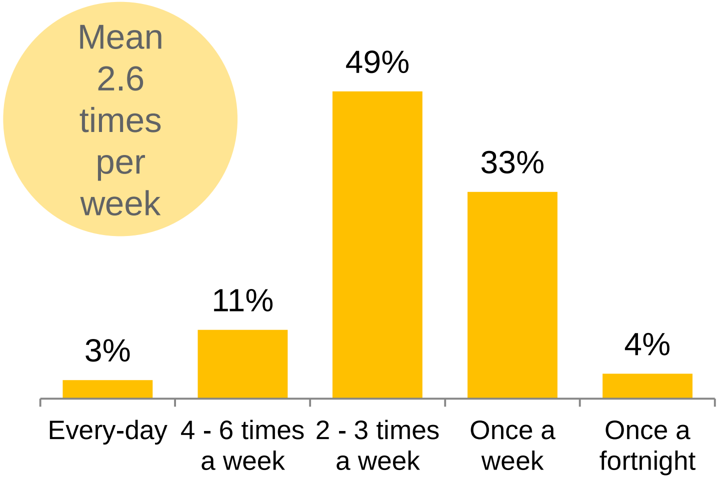
People are shopping

2.6 times

per week

The 'weekly shop' is dead. On average people are at a point of sale ready to buy more than 135 times per year

Grocery Shopping



Eager Explorers

Shop 2.7 times a week

89% buy vegetables more than once a week ▲

Flavour Followers

Shop 2.4 times a week

81% buy vegetables more than once a week

Wholesome Habits

Shop 2.4 times a week

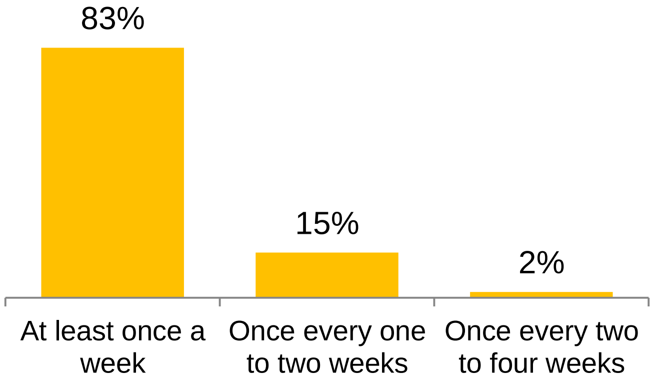
77% buy vegetables more than once a week ▼

Conscious Improvers

Shop 2.7 times a week

84% buy vegetables more than once a week

Vegetable Purchase



Q3 In a typical week, how often would you visit a supermarket/grocery store/market?
S9 You said that you purchase fresh vegetables at least once a month, on average how often do you purchase fresh vegetables?
(Base; All respondents)

▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

People are usually shopping at the big supermarkets

But prefer to shop at Green Grocers and markets

Less likely Wholesome Habits (13%)

More likely Conscious Improvers (17%)

Usually shop in multiple locations	Woolworths	Coles	Local Grocer	Aldi	Independents	Farmer's Markets	Specialty retailers	Public/ wholesale Markets
	61%	57%	44%	27%	21%	20%	11%	10%

Prefer to shop	Local Grocer	Woolworths	Coles	Farmer's Markets	Aldi	Independents	Public/ wholesale Markets	Specialty retailers
	28%	20%	18%	12%	6%	4%	3%	2%

More likely Eager Explorers (7%)

Q6a. Tell us all the places you usually buy vegetables? MR (Base: All Respondents)

Q6b. And where do you prefer to buy them? SR (Base; All respondents)

Coles and Woolies are close by, always open and competitively priced

For ease and convenience, grocery buyers rely on purchasing from these locations

- Whilst Coles and Woolies are the usual shop for most, we heard lots of negative comments about the quality of the available produce.
- The big retailers are acknowledged to be competitively priced, but this is seen to be because their produce is bought in bulk, kept refrigerated at length, resulting in poorer quality than grocers and markets.
- However, recent initiatives such as 'Jamie Oliver' recipes and meal ideas with convenient product placements are considered a positive supermarket offer. This inspiration and value-add is considered a reasonable trade off for quality.

> *I notice the cucumber if you buy from Coles is tasteless, just like water. You might as well eat water and the same for apples, broccoli and strawberries. The price is great but the taste is not there.* (Sydney)

> *Most of the time I buy from Woolies and Coles. For me it's just easier, more convenient, on my way home from work and always open.* (Melbourne)

> *I do Coles and Woolies because I'm lazy and tired.* (Melbourne)

Buyers tell us they 'grab and go' in the supermarkets, it's about getting what you think you need and leaving quickly.
It's the place for meal ideas, packages, and pre-prepared vegetables.

Local smaller and market style retailers are preferred for their freshness, quality, value and range

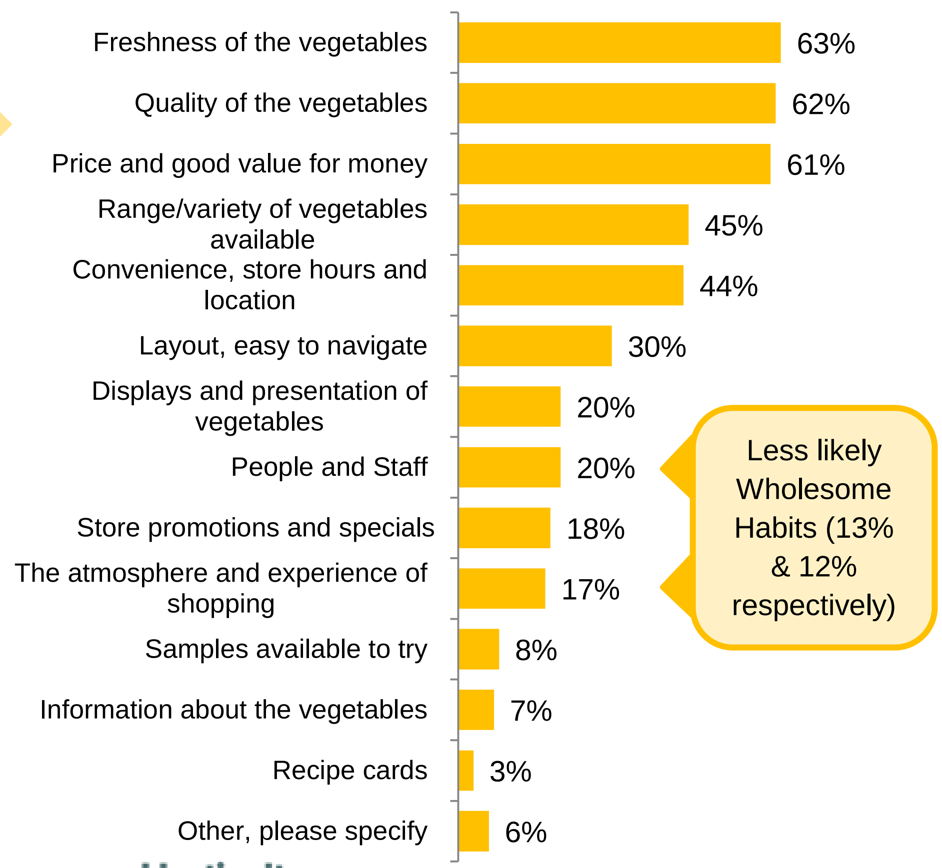
But for many it's more than just the product, they value the experience, atmosphere and people

Buyers are open to an 'experience' at local grocers and markets. They have the time and inclination to take in information. It's the place to communicate new ideas and introduce new ingredients and tastes.

> *Going to a market is an outing. I spend all day there. (Melbourne)*

> *The organic store is my treat. It's special, I look forward to going there even though it's higher priced. (Melbourne)*

Reasons for Preferred Location



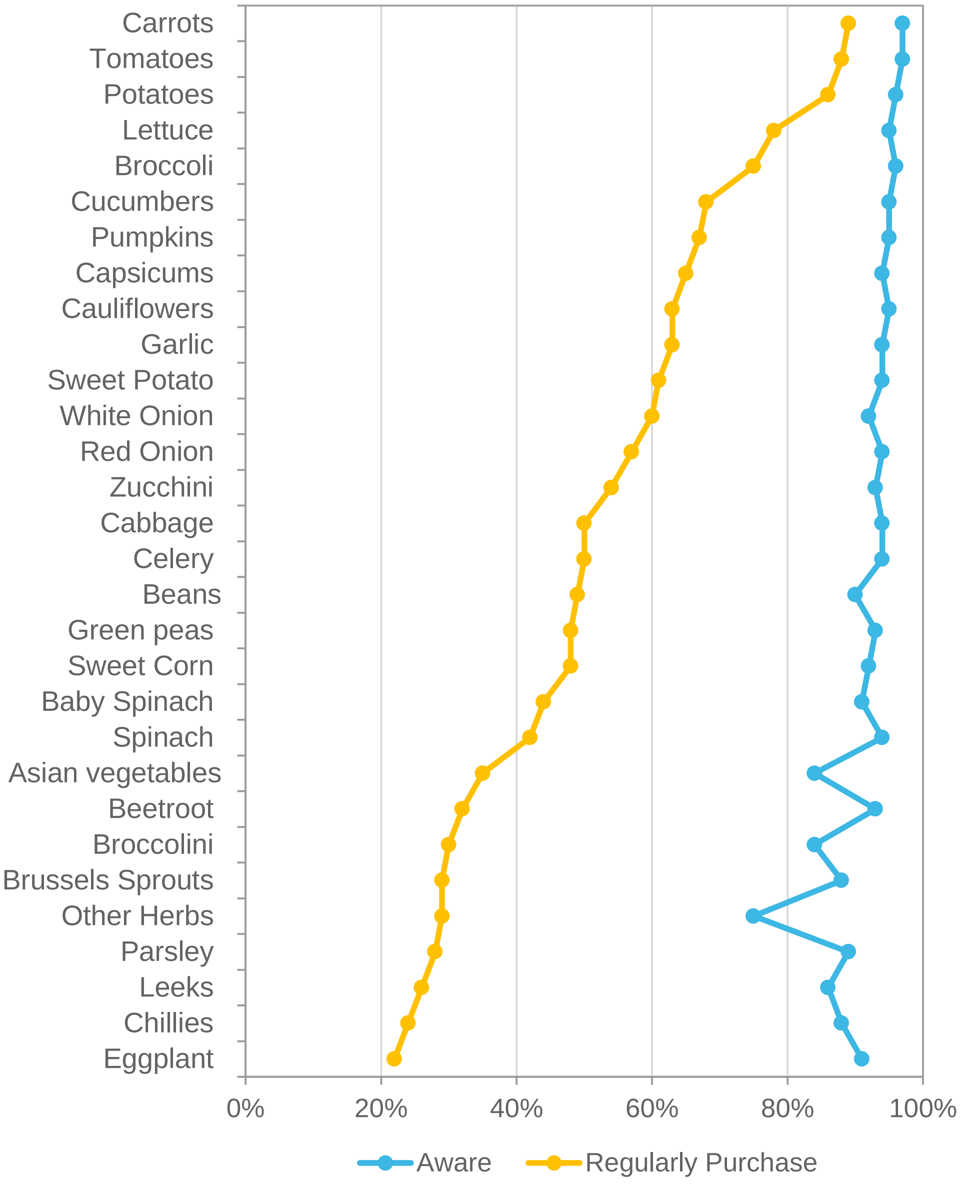
Freshness of the vegetables	63%
Quality of the vegetables	62%
Price and good value for money	61%
Range/variety of vegetables available	45%
Convenience, store hours and location	44%
Layout, easy to navigate	30%
Displays and presentation of vegetables	20%
People and Staff	20%
Store promotions and specials	18%
The atmosphere and experience of shopping	17%
Samples available to try	8%
Information about the vegetables	7%
Recipe cards	3%
Other, please specify	6%

Less likely Wholesome Habits (13% & 12% respectively)

Q7. What is it about this store that you prefer for buying your fresh vegetables/ MR (Base: All Respondents)

Consumers are aware of many more vegetables than they typically buy

Overall, vegetables have strong levels of awareness, yet a lot of these vegetables are not regularly purchased.



Q1 Which of the following vegetables are you aware of?
Q2 Which of the following vegetables do you regularly purchase?

Although more than 100 vegetable commodities are on offer, consumers are purchasing only 17 regularly

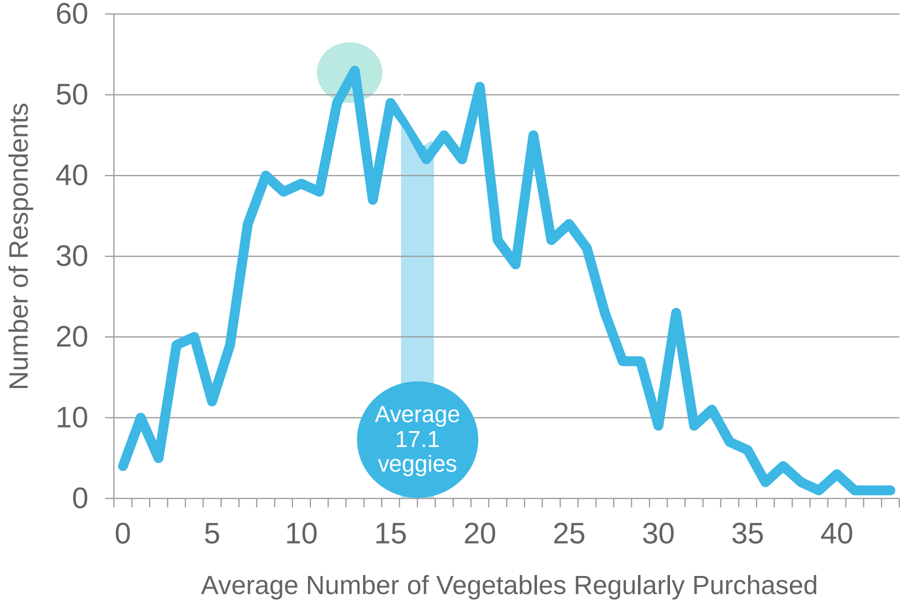
Eager Explorers and Conscious Improvers who value 'new things', purchase a greater repertoire of vegetables

Eager Explorers
19.7
vegetables regularly purchased

Flavour Followers
16.6
vegetables regularly purchased

Wholesome Habits
14.8
vegetables regularly purchased

Conscious Improvers
17.0
vegetables regularly purchased



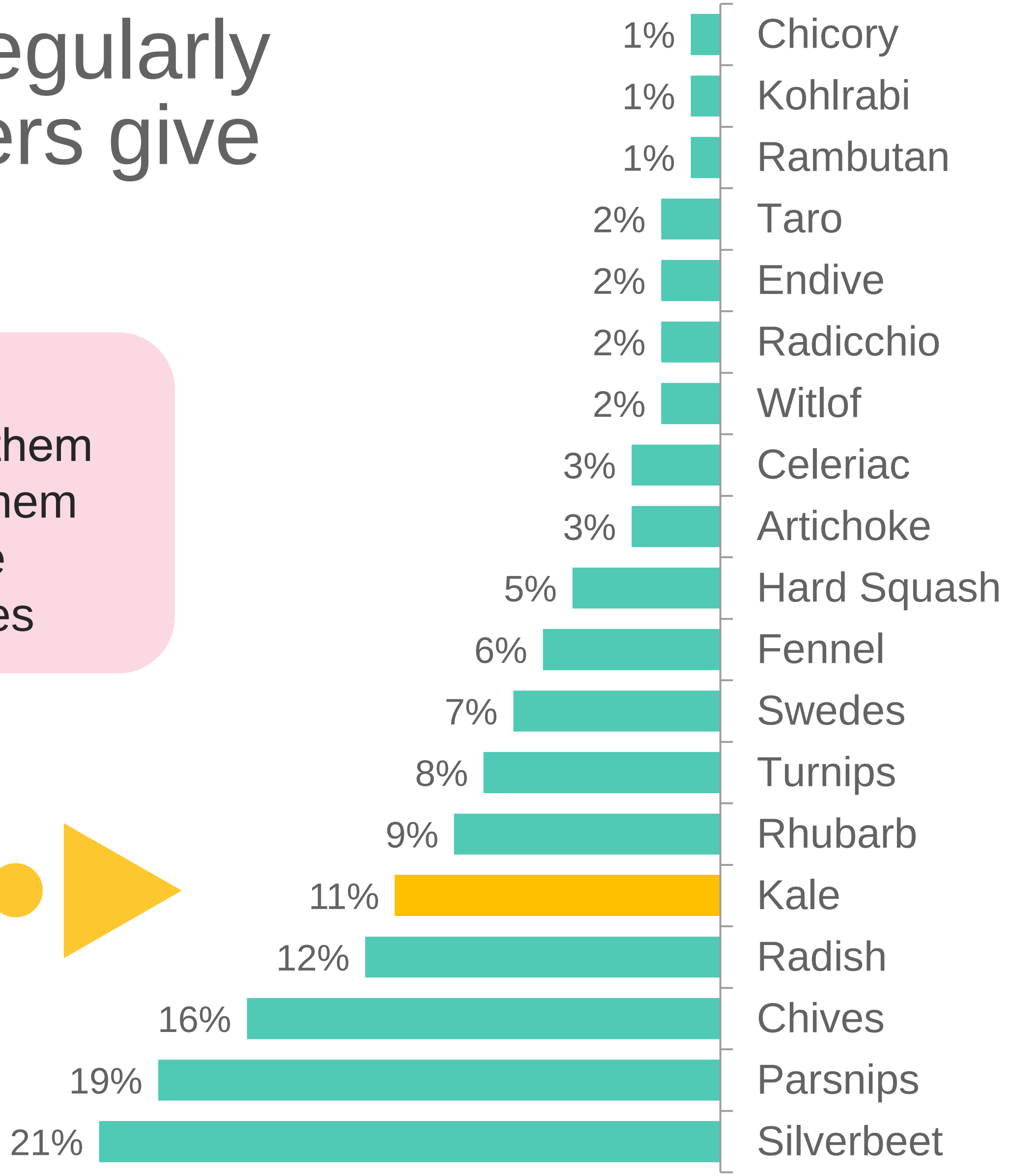
A great opportunity exists to increase the Australian's average fresh vegetable repertoire.
Each segment requires different triggers to encourage greater purchase.

Q2 Which of the following vegetables do you regularly purchase?

There are a number of vegetables that are not regularly purchased; and consumers give us many reasons why

Never see them
Wouldn't know what to do with them
Had them as a kid and hated them
No idea what they taste like
I buy enough other vegetables

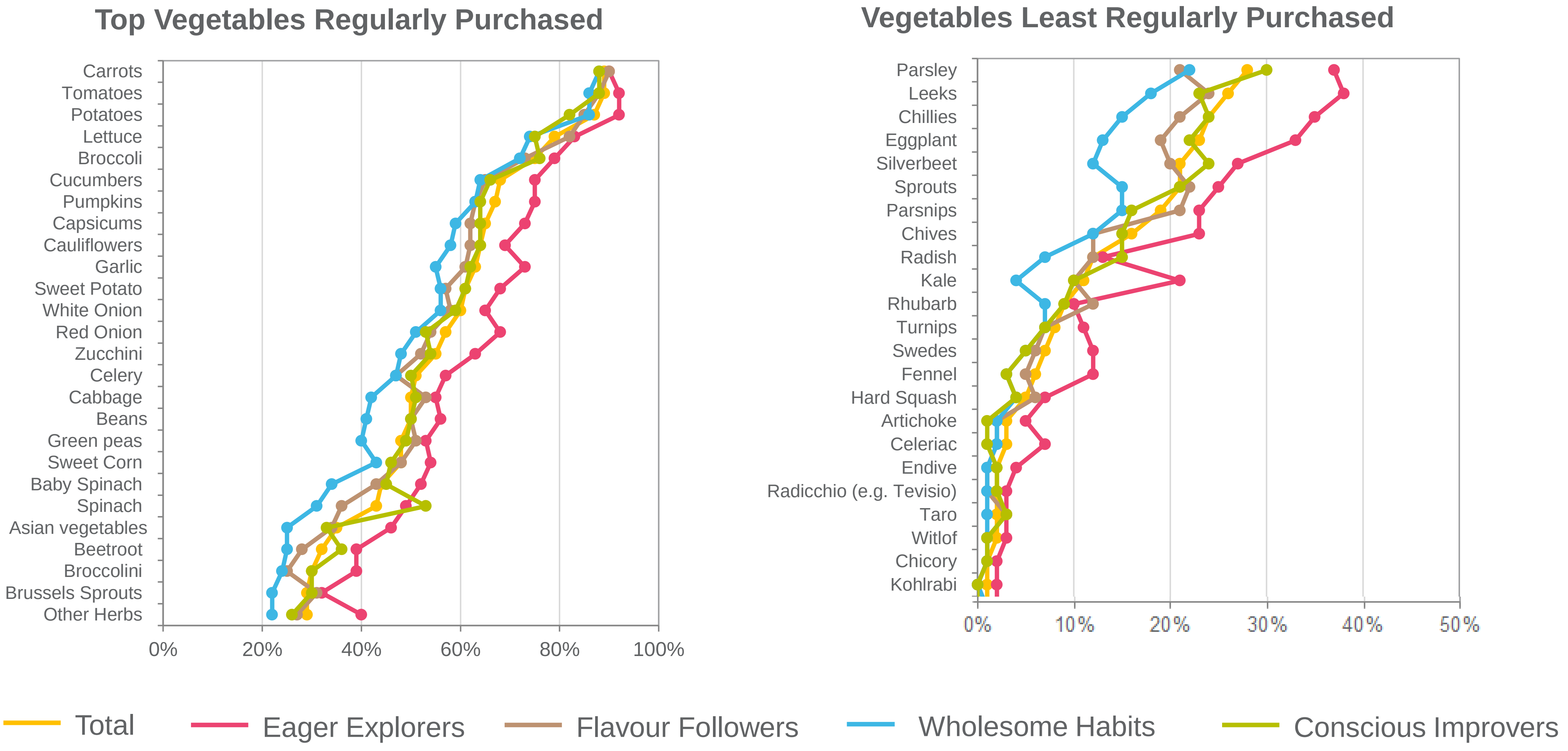
Kale has a lot of media coverage, hailed as the new 'superfood', but only a small number of Australians are regularly purchasing it. However, with increased availability in the mainstream outlets and continual word of mouth recommendations, many consumers tell us they are getting ready to try it.



Q2 Which of the following vegetables do you regularly purchase?

It is the Eager Explorers that are leading the way with a higher regular purchasing repertoire

Targeting each segments' key needs is required to encourage growth



Q2 Which of the following vegetables do you regularly purchase?
Base: All respondents (n=1032)

Consumers eat vegetables **only** once a day on average

With multiple meal and snack opportunity across 24 hours, there is room to increase consumption

People eat vegetables

7.5 times

per week

Eager Explorers

8.3 times per week

More likely weekend breakfast and weekday lunch than other segments

Flavour Followers

7.1 times per week

No occasion difference to total

Wholesome Habits

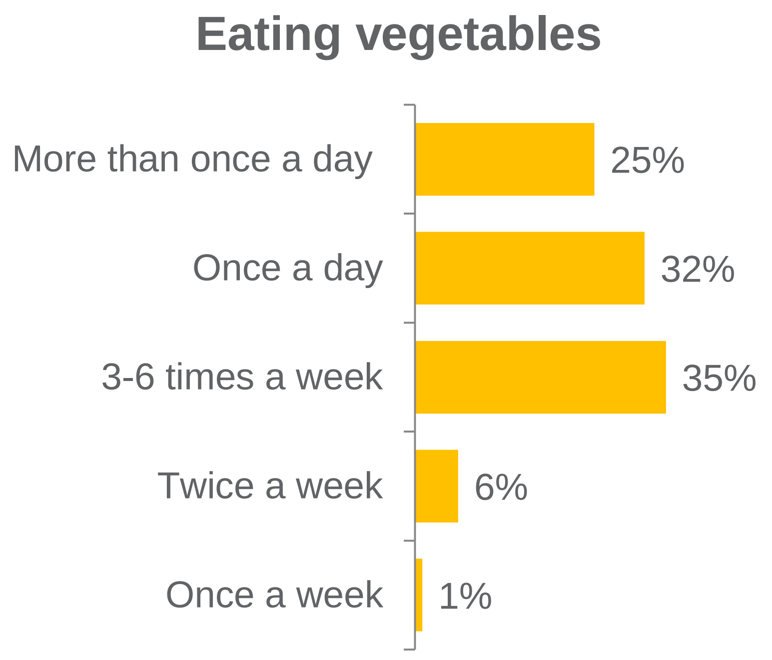
6.6 times per week

Less likely weekday breakfast, weekend lunch and dinners

Conscious Improvers

7.7 times per week

No occasion difference to total



Eating vegetables

Dinner at home is the most common occasion. Followed by lunch and the locations of restaurants and work. Snacks and breakfast are the least frequent occasions.

Q8 On average, how many times do you eat FRESH VEGETABLES? (Base: All Respondents)
Q9. Which of the following times of the week/day do you eat fresh vegetables? (Base: All Respondents)
Q10. Where did you eat fresh vegetables? (Base: All Respondents)

Dinner and lunch are they key consumption occasions, the majority of which is consumed at home

Consumption Occasion

Dinner:
Weekday- 92%
Weekend- 80%

Lunch:
Weekday- 51%
Weekend- 46%

Snacks at home:
Weekday- 15%
Weekend- 14%

Snacks on the go:
Weekday- 11%
Weekend- 8%

Breakfast:
Weekday- 10%
Weekend- 8%

Consumption Location

Home- 97%

Restaurant- 22%

Work- 20%

Friends/Family's House- 18%

Fast Food Outlet- 7%

Outside on the Go- 6%

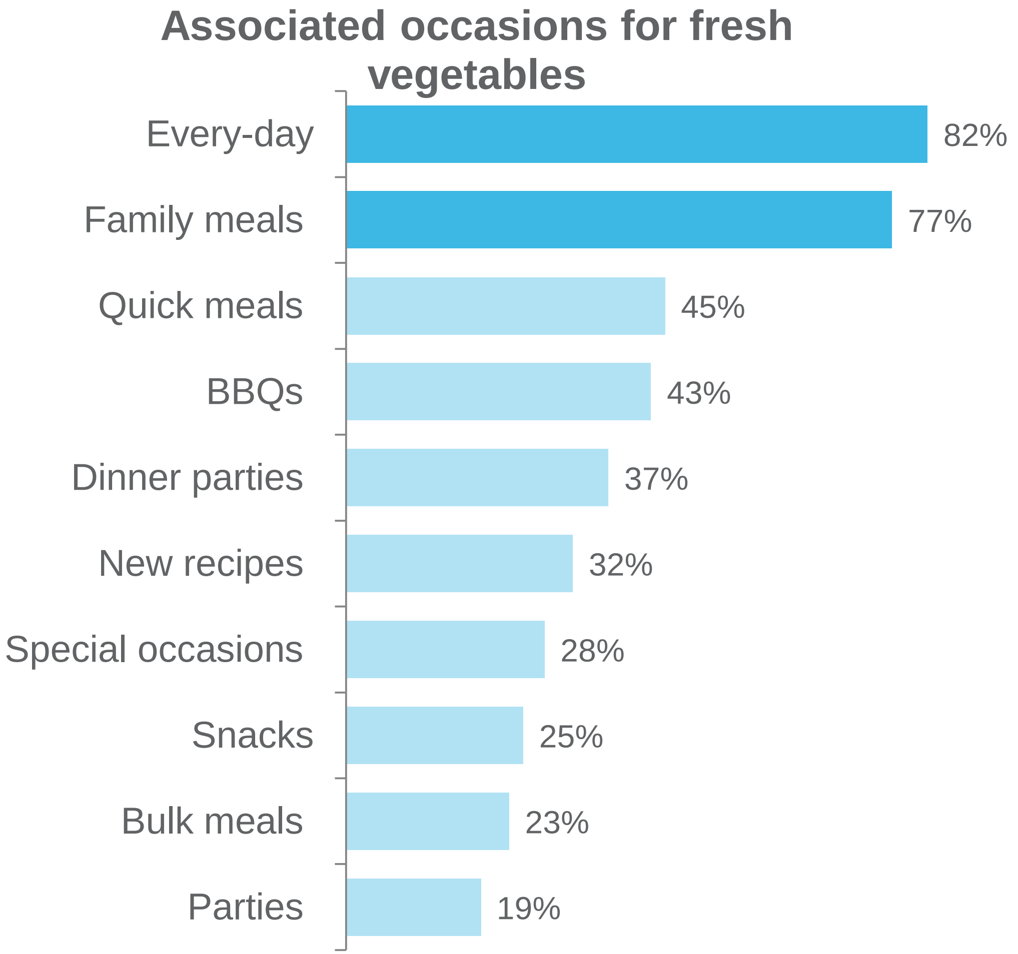
In the Car-4%

Q9 Which of the following times of the week/day did you eat FRESH VEGETABLES?
Q10 Where did you eat FRESH VEGETABLES?
Q11 Which of the following occasions do you associate with cooking/eating FRESH VEGETABLES?

Vegetable consumption is associated with everyday and family meals

Consumers have established uses and routines for fresh vegetables in their everyday and family meals ✓

- Inspire consumers beyond the everyday …..The area for growth is to establish the same associations with quick meals, special occasions, snacks, bulk meals and parties. !



Q11 Which of the following occasions do you associate with cooking/eating FRESH VEGETABLES?

Consumers tell us they purchase ‘fridges full of vegetables’, or ‘all that they need’

Buyers need to be educated and shown ways to incorporate vegetables into meals other than dinner

- A mindset that ‘vegetables’ are for dinner, or once a day are extremely strong and evident in the average consumption of only 7.5 times a week.
- However, when asked, buyers admit that there are many meal and snack times when they would be open to incorporating vegetables. And they understand the health benefits that will result.
- The challenge is to position vegetables as a desirable alternative/replacement for what is currently being eaten at these other times.

> *When I think about vegetables I think about ‘a partner for your meat’. I don’t think about uses for other meals/snacks. (Hobart)*

> *I probably need to stop buying biscuits etc, so all snacks are fruit & veg and not fill up on rubbish. (Adelaide)*

> *Veggie snacks are a great idea, but my kids got embarrassed when I took a bag of carrots and capsicum sticks to the local show. It’s hard. (Regional Tasmania)*

Vegetables as snacks are a desirable use. However the challenge is breaking the habit of other snacks foods. There is an opportunity to challenge the natural attitude that ‘vegetables once a day’ is good health.

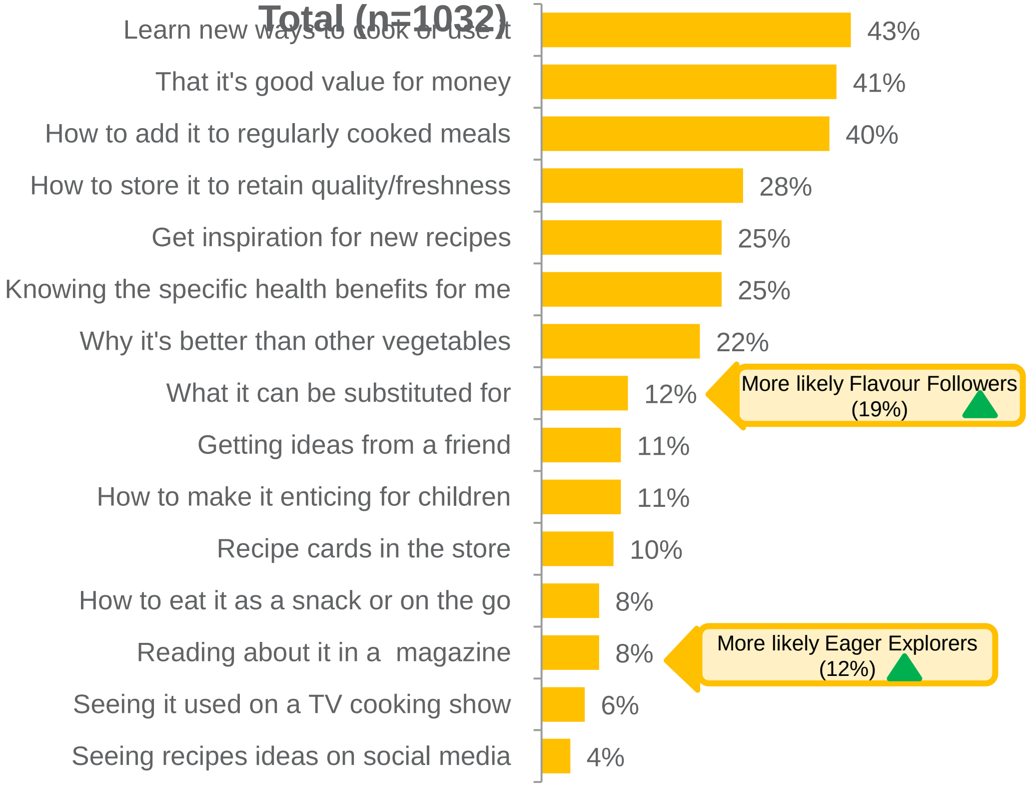
Learning new ways to use familiar vegetables and knowing they are good value for money will increase consumption and regular purchase

Segments' top 4 needs

Eager Explorers want new ideas and are likely to read about it. Other segments want to know it's good value for money. Flavour Followers want to know what it can be substituted for. Conscious Improvers will tune into messages about the health benefits.

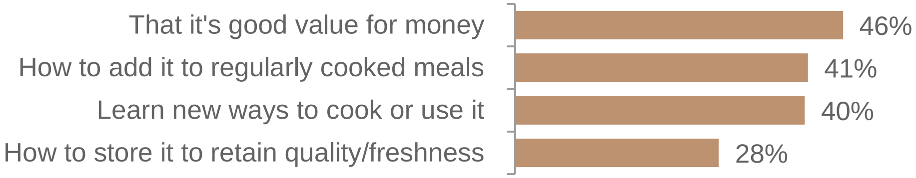
Needed for greater purchase of familiar vegetables

Total (n=1032)

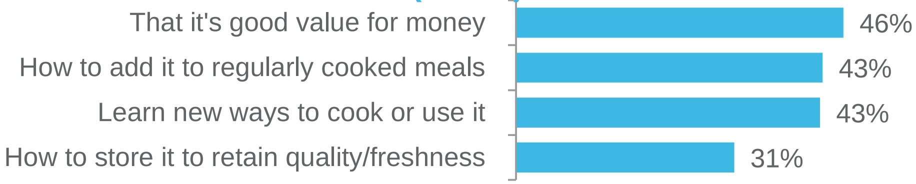


Eager Explorers need (n=306)

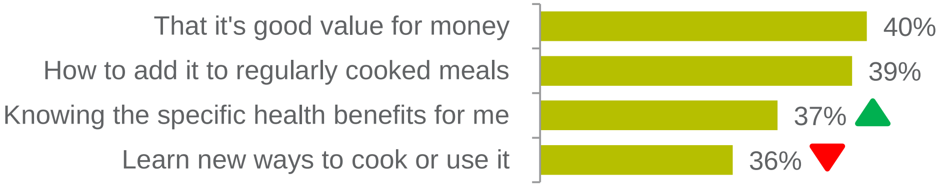
Flavour Followers need (n=226)



Wholesome Habits need (n=273)



Conscious Improvers need (n=227)



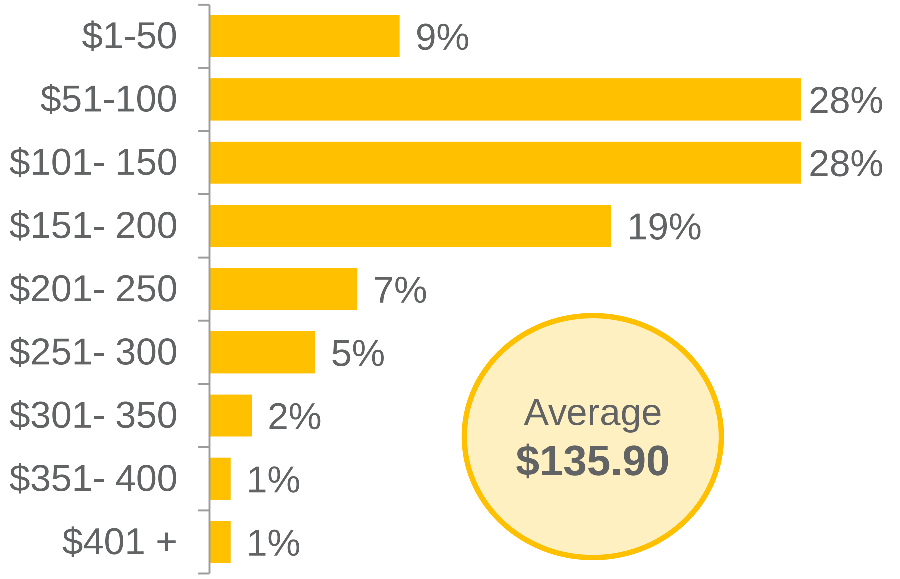
Q28. What needs to happen for you to eat/buy this vegetable more often? (Base: All Respondent)

▲ Significantly HIGHER compared to total sample at 95% confidence. ▼ Significantly LOWER compared to total sample at 95% confidence.

On average, consumers are spending $135 on grocery items each week with 22% spent on fresh vegetables

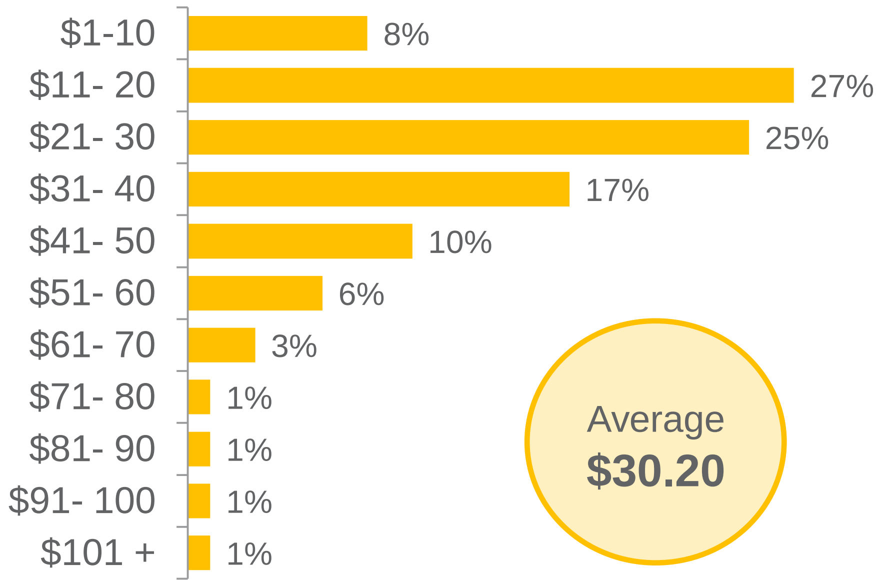
This proportion was surprisingly low for most buyers

Weekly grocery spend



Eager Explorers	Flavour Followers	Wholesome Habits	Conscious Improvers
$142.70	$128.60	$133.90	$136.30

Weekly fresh vegetable spend



Eager Explorers	Flavour Followers	Wholesome Habits	Conscious Improvers
$33.00 (23%)	$28.20 (22%)	$26.70 (20%)	$32.50 (24%)

Q4 Approximately how much do you spend on GROCERY shopping (ie. anything from a supermarket/grocery store or market such as Fruit, Meat, Cleaning Products etc.) per week? (Base: All Respondents)
Q5 And thinking specifically about the FRESH VEGETABLES you purchase (not fresh fruit), approximately how much of your weekly grocery money do you think you spend on FRESH VEGETABLES each week? (Base: All Respondents)

Fresh Vegetables are surprisingly (and unknowingly) great value for money

This is an important message to communicate to overcome a perceived barrier of expense

- vegetables are exceptional value for money; however consumers do not naturally think this.
- When prompted to consider fresh vegetable spend relative to overall grocery purchases, buyers admit it is non-vegetable items that make up the majority of their grocery budget.

I really thought the percentage would be higher. We eat vegetables most nights and I have three kids. I was surprised. (Regional Queensland)

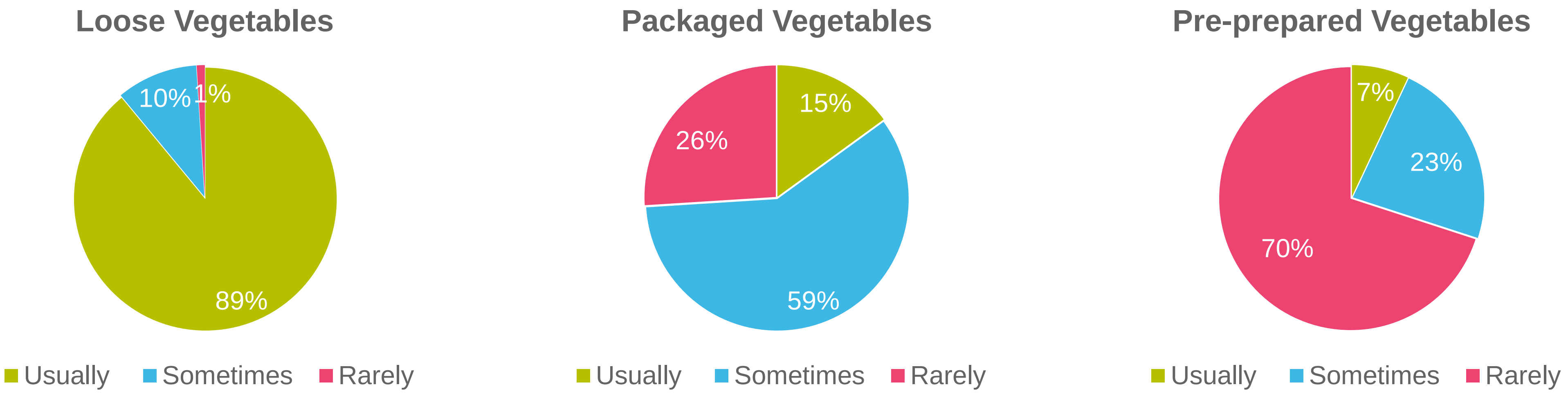
It makes you realise how cheap vegetables are when you compare it to how much you spend on meat and cleaning products. (Regional Victoria)

It amazed me that vegetables are so cheap when I added it up. It's not as expensive as I thought and I can get a lot out of what I spend. (Sydney)

An opportunity exists to continually emphasise affordability, and debunk the 'vegetables are expensive' myth.

Loose vegetables are regularly purchased by all consumers. Packaged vegetables are purchased occasionally, whilst pre-prepared vegetables are not an essential purchase to consumers

No differences exist across segments in terms of the frequency that each format is purchased.
However, in terms of reasons for buying packed or pre-prepared, the Wholesome Habits segment is more strongly motivated by eliminating the preparation time/effort required.



Q18_1, Q18_2, Q18_3. Vegetables can be LOOSE, IN A PACK or PRE-PREPARED. How often do you buy vegetables in these three ways? (BUY EACH WEEK) (Base: All respondents)

Consumers purchase multiple formats of vegetables

Canned
44%

Frozen
76%

Dehydrated
4%

Only Fresh
17%

Eager Explorers

Significantly more likely to be purchasing ‘frozen’ (82%). This represents a challenge that these buyers are not able to have all their needs met in the fresh vegetable category

Flavour Followers

No significant differences. Purchase in-line with total market

Wholesome Habits

No significant differences. Purchase in-line with total market

Conscious Improvers

Significantly more likely to purchase ‘fresh only’ (24%)

This suggest that the key driver of health is being positively received by this segment.

Q22 Do you regularly purchase vegetables in other formats? (Base: All Respondents)

Why is frozen a fierce competitor?

Although consumers are shopping multiple times a week, the advantage of frozen vegetables is the ability to use them conveniently in the kitchen without the need for a further trip out to the shops. Fresh vegetables need to match the quality and shelf life benefits of the frozen competitors.

- People tell us that frozen vegetables can hold as much appeal as fresh vegetables. And in some cases they can be considered better quality. One standout example was ‘frozen green beans.’
- With growing education about ‘snap fresh’ there is a perception of higher nutritional benefit compared to ‘poor quality looking’ fresh vegetables.
- Other strong advantages of frozen commodities are the ability to be spontaneous in the kitchen, without the need to go out and buy specific fresh vegetables. Examples are when handfuls of peas, corn or mixed vegetables can be simply taken from the freezer and added to a meal at any stage.

> *(Comparing fresh pre-prepared to frozen pre-prepared) I find the quality of (frozen green beans) much better than fresh. (Brisbane)*

> *You can add a handful of corn to a meal if it needs a bit of colour or taste, so having it in the freezer is really handy. (Melbourne)*

> *I find fresh loose beans quite rubbery lately. Rubbery, soft and brown. The frozen ones are crunchy and bright green and fresh tasting.(Brisbane)*

Decision making in-store.

Buying vegetables makes people feel healthy

Emotions are powerful. How people feel impacts how they behave.

Of the **seven most common emotions**, most people feel healthy when buying vegetables.

55%
Healthy

30%
Fresh

22%
Responsible

19%
Organised

12%
Down to Earth

11%
Confident

10%
Relaxed

However, only one in ten are feeling confident and relaxed.

Q25 How do you feel when you are buying fresh vegetables? From the following list choose three words that describe how buying fresh vegetables makes you feel. (MR)
Base: All respondents (n=1032)

Understanding how people feel in-store can provide powerful cues to reinforce and encourage positive behaviours

Encouraging positive feelings and emotions in-store will enhance how shoppers feel about themselves and the act of buying vegetables.

Reinforce existing positive feelings

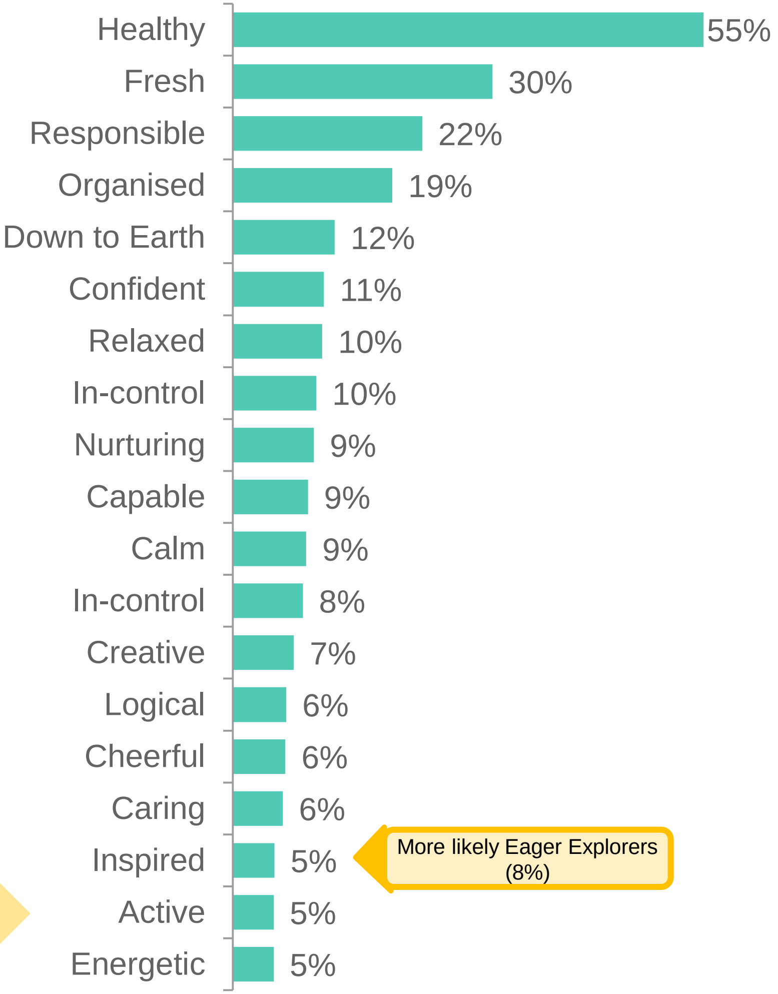
- Feeling ‘healthy’ is the most common emotion when buying vegetables (55%), linked to this is a feeling of ‘freshness’ (30%)
- Buying vegetables triggers feelings of being responsible and organised for around one in five people.

Strengthen lesser felt positive emotions

- However, less than one in ten people indicate they feel other positive emotions such as; confidence, creative, inspired, calm, nurturing.
- Provide consumers with messages, imagery and information that will strengthen these positive feelings.

Leverage emotional triggers in communications and messaging on packaging and imagery at point of sale.

Positive feelings in-store



More likely Eager Explorers (8%)

Q25 How do you feel when you are buying fresh vegetables? From the following list choose three words that describe how buying fresh vegetables makes you feel. (MR) . **Emotions felt by less than 5% of all respondents are not charted
Base: All respondents (n=1032)

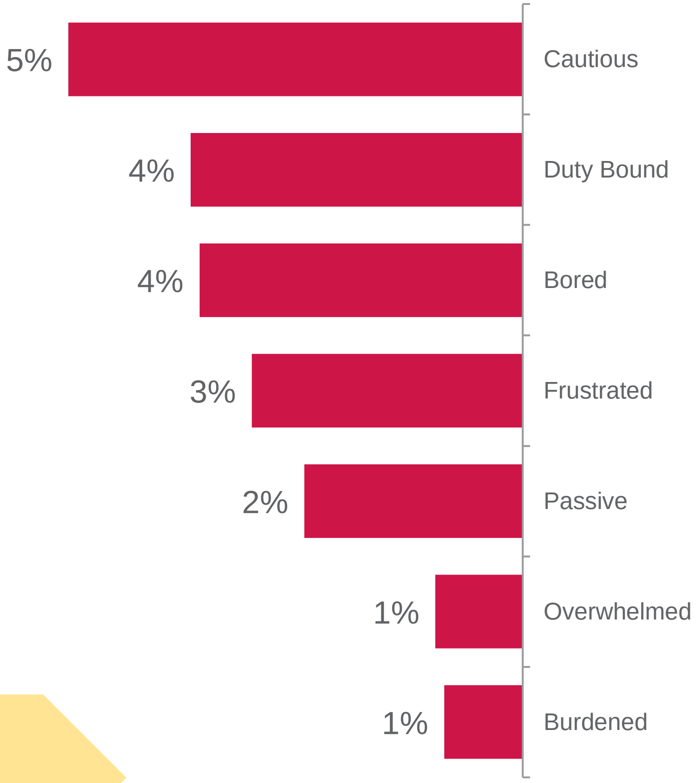
Although negative feelings in-store are less common, they do exist and messaging to overcome them will encourage more positive purchasing behaviours

Whilst it is more common to feel positive emotions when shopping for vegetables, some people indicate they feel negative emotions.

These include:

- Cautious – This can relate to such fears as wasting food or money, lacking confidence to know how to cook or prepare, not wanting to try anything new, or worrying if others will enjoy eating the veggie.
- Duty bound, Bored, Passive & Burdened– This can relate to the act of grocery shopping being mundane and not enjoyable, or having no interest in the idea of cooking vegetables.
- Frustrated – This can relate to unavailability of products, inferior quality, inflated prices, or limited expected shelf life.
- Overwhelmed – This can relate to new varieties on the market, not knowing what to choose for what reason or how to prepare it.

Negative feelings in-store



Information and messages should show consumers how to overcome negative feelings when purchasing fresh vegetables

Q25 How do you feel when you are buying fresh vegetables? From the following list choose three words that describe how buying fresh vegetables makes you feel. (MR) . **Emotions felt by less than 5% of all people are not charted
Base: All respondents (n=1032)

The overall top four reasons to buy a vegetable speak directly to the heart of each segment; Flavour, Health, Preparation, Variety

It is less about being new, exciting, price, or what it looks like.

Must haves

Important check list

For broadest appeal, people must know:

- ✓ What the veggie will taste like (Attracts the **Flavour Followers**)
- ✓ The specific health benefits (Attracts the **Conscious Improvers**)
- ✓ How to simply cook and prepare (Attracts the **Wholesome Habits**)
- ✓ It will add variety to their diet (Attracts the **Eager Explorers**)

Q15 If you think about the vegetables that you usually buy, what other reasons (beyond being healthy) do you choose the ones you do?
Q16 What reasons listed below describe why you don't purchase MORE fresh vegetables when you shop?

Embracing the opportunity to present information in-store is crucial to encourage greater purchase (both more quantity and variety)

Otherwise, people limit their purchases based on what they already know before they arrive

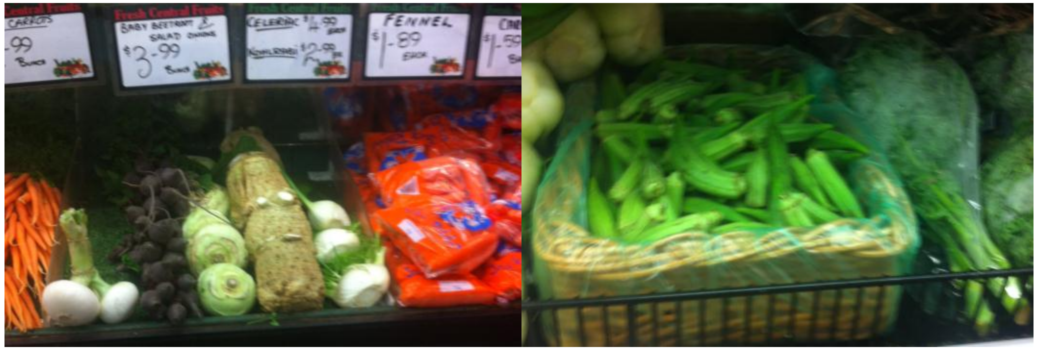
! Despite a special low price, this display of Asian vegetables offers no information about how to use the vegetable, or what the taste will be like.

! Simple descriptors such as ‘sweet’ and ‘hot’ make choosing the right vegetable easy.
Consumers are fearful that adding too much, or the wrong flavour, might ruin their meal.

! Poster displays in-store educate customers about the best uses, taste expectations, texture expectation and health benefit.

Images taken whilst in-store during accompanied shopping interview stage.

! A ‘new’ vegetable needs multiple entry points. For example, large bunches of kale appeal to those who know the benefits, uses and expectations. Inclusion in traditional mixes (such as coleslaw) provide an easy option for traditionalists to trial.



! Less frequently purchased vegetables require clear information communicated at point of sale – Taste, health benefits, preparations methods.

Name and price are simply not enough to trigger purchases for new customers.

! Providing loose and packaged vegetables has broad appeal.

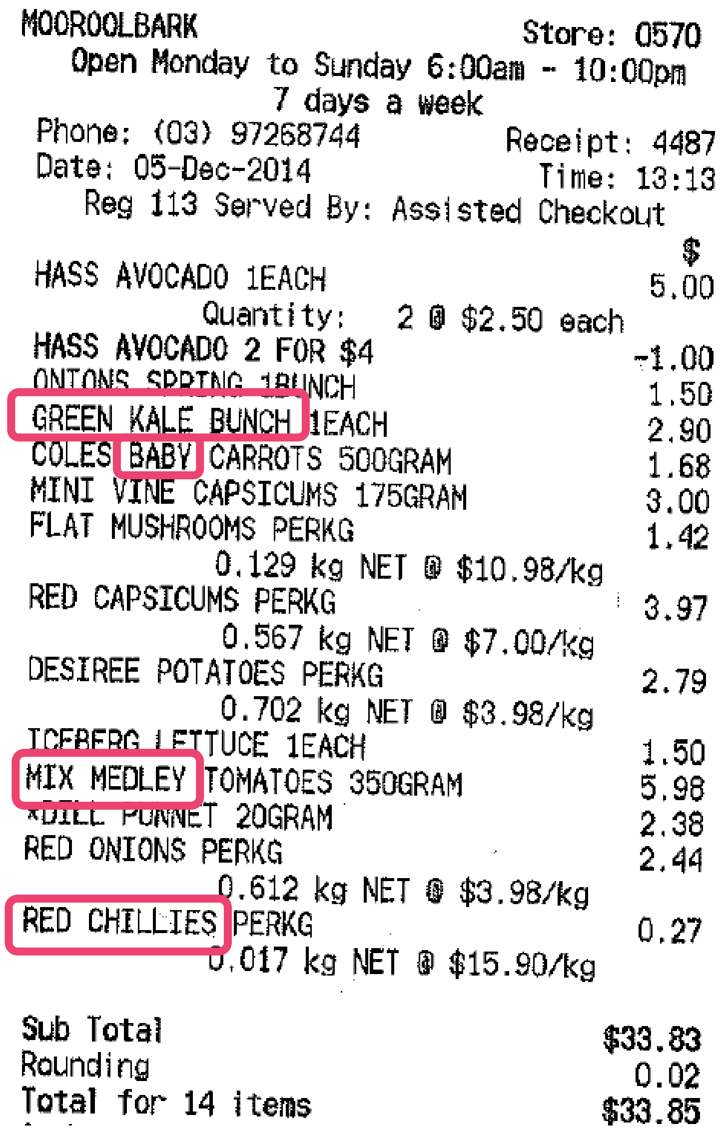
The benefit of the packaged format may encourage people to add more vegetables to their diets. Price and reason to try will influence choice.

Images taken whilst in-store during accompanied shopping interview stage.

Eager Explorers are more likely to purchase ‘new’ vegetables on the market like kale, baby and mixed varietals.

Flavour followers choose vegetables they are familiar with and enjoy the combination of flavours.

Eager Explorer



MOOROOLBARK Store: 0570
Open Monday to Sunday 6:00am - 10:00pm
7 days a week
Phone: (03) 97268744 Receipt: 4487
Date: 05-Dec-2014 Time: 13:13
Reg 113 Served By: Assisted Checkout

	$
HASS AVOCADO 1EACH	5.00
Quantity: 2 @ $2.50 each	
HASS AVOCADO 2 FOR $4	-1.00
ONIONS SPRING 1BUNCH	1.50
GREEN KALE BUNCH 1EACH	2.90
COLES BABY CARROTS 500GRAM	1.68
MINI VINE CAPSICUMS 175GRAM	3.00
FLAT MUSHROOMS PERKG	1.42
0.129 kg NET @ $10.98/kg	
RED CAPSICUMS PERKG	3.97
0.567 kg NET @ $7.00/kg	
DESIREE POTATOES PERKG	2.79
0.702 kg NET @ $3.98/kg	
ICEBERG LETTUCE 1EACH	1.50
MIX MEDLEY TOMATOES 350GRAM	5.98
*DILL PUNNET 20GRAM	2.38
RED ONIONS PERKG	2.44
0.612 kg NET @ $3.98/kg	
RED CHILLIES PERKG	0.27
0.017 kg NET @ $15.90/kg	
Sub Total	$33.83
Rounding	0.02
Total for 14 items	$33.85

Flavour Follower

LOOSE LEEKS	1.69
LOOSE LEEKS	1.69
** LOO MULTI BUY DISCOUNT**	-0.38
0 @ $-0.38 Each	
BROCCOLI	1.47
0.295 Kg @ $4.99 Per Kg	
CARROTS	0.76
0.38 Kg @ $1.99 Per Kg	
LOOSE CELERY	2.47
0.62 Kg @ $3.99 Per Kg	
SALAD MIX	1.80
0.12 Kg @ $14.99 Per Kg	
BASIL	3.99
CORRIANDER	2.49
SALAD MIX	1.72
0.115 Kg @ $14.99 Per Kg	
BRUSHED POTATOES	2.68
1.17 Kg @ $2.29 Per Kg	
BROWN ONIONS	1.36
0.39 Kg @ $3.49 Per Kg	
BLUSH TRUSS TOMATOES	3.52
0.705 Kg @ $4.99 Per Kg	
CONTINENTAL CUCUMBERS	2.99
MEXICAN GARLIC	2.62
0.105 Kg @ $24.99 Per Kg	
BUTTON MUSHROOMS	1.90
0.19 Kg @ $9.99 Per Kg	
RED CAPSICUM	1.08
0.18 Kg @ $5.99 Per Kg	
ITEMS 16	
SUBTOTAL	33.85
EFTPOS	33.85
G.S.T	0.00

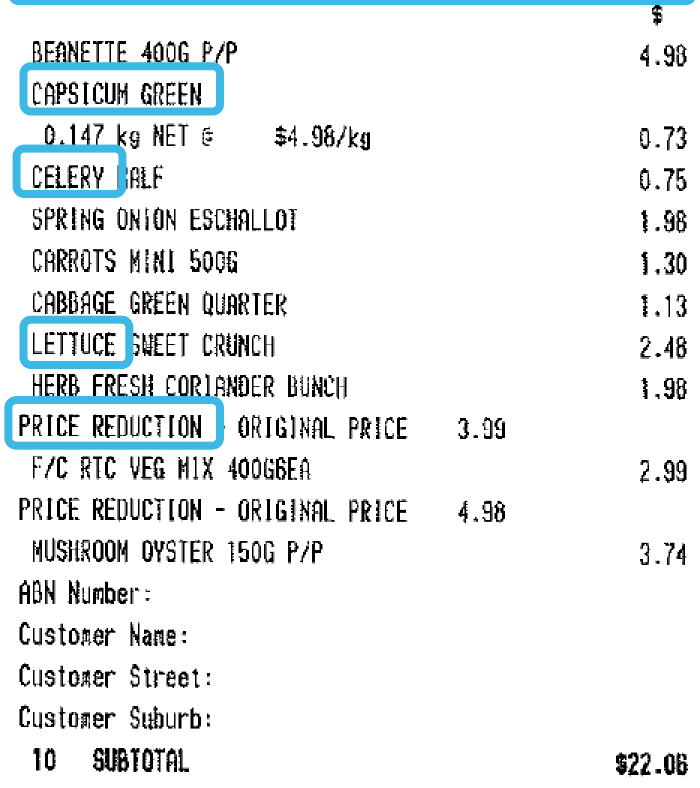
Horticulture Innovation Australia

colmar brunton.

In-store Wholesome Habits are more likely to purchase produce on price promotion/special.

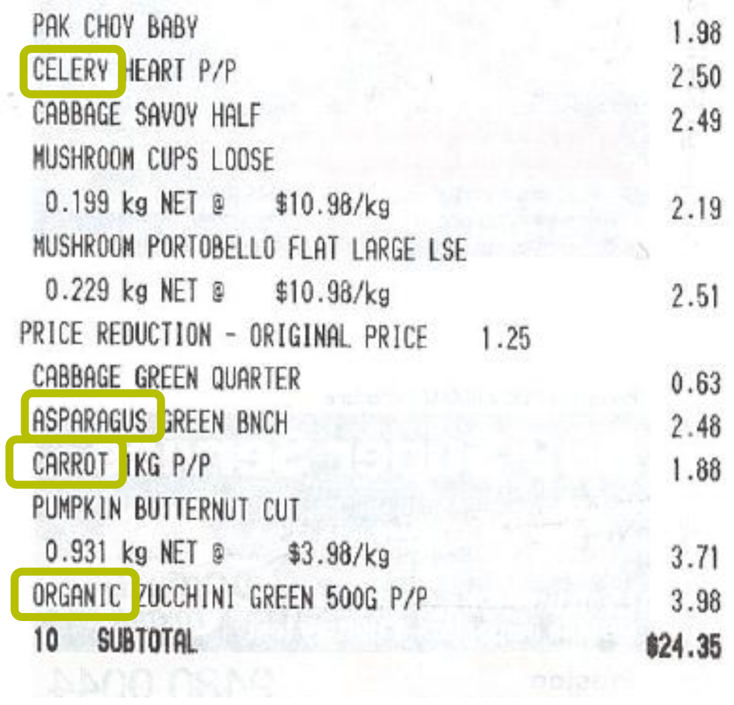
Conscious Improvers choose vegetables that are going to provide high nutritional content, and believe in the benefits of organic produce.

Wholesome Habits



		$
BEANETTE 400G P/P		4.98
CAPSICUM GREEN		
0.147 kg NET @ $4.98/kg		0.73
CELERY HALF		0.75
SPRING ONION ESCHALLOT		1.98
CARROTS MINI 500G		1.30
CABBAGE GREEN QUARTER		1.13
LETTUCE SWEET CRUNCH		2.48
HERB FRESH CORIANDER BUNCH		1.98
PRICE REDUCTION - ORIGINAL PRICE	3.99	
F/C RTC VEG MIX 400GBEA		2.99
PRICE REDUCTION - ORIGINAL PRICE	4.98	
MUSHROOM OYSTER 150G P/P		3.74
ABN Number:		
Customer Name:		
Customer Street:		
Customer Suburb:		
10 SUBTOTAL		$22.06

Conscious Improver



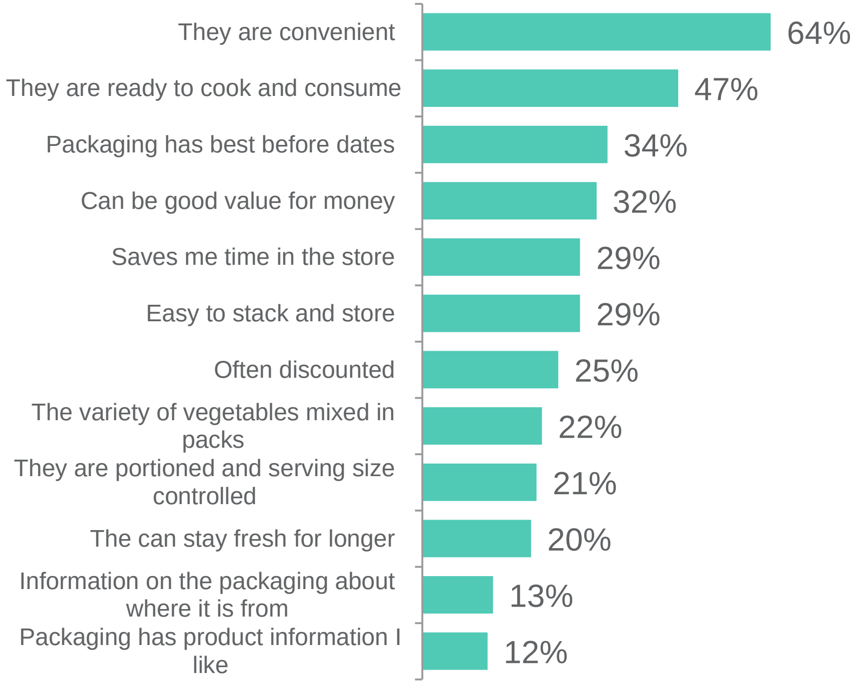
PAK CHOY BABY		1.98
CELERY HEART P/P		2.50
CABBAGE SAVOY HALF		2.49
MUSHROOM CUPS LOOSE		
0.199 kg NET @ $10.98/kg		2.19
MUSHROOM PORTOBELLO FLAT LARGE LSE		
0.229 kg NET @ $10.98/kg		2.51
PRICE REDUCTION - ORIGINAL PRICE	1.25	
CABBAGE GREEN QUARTER		0.63
ASPARAGUS GREEN BNCH		2.48
CARROT 1KG P/P		1.88
PUMPKIN BUTTERNUT CUT		
0.931 kg NET @ $3.98/kg		3.71
ORGANIC ZUCCHINI GREEN 500G P/P		3.98
10 SUBTOTAL		$24.35

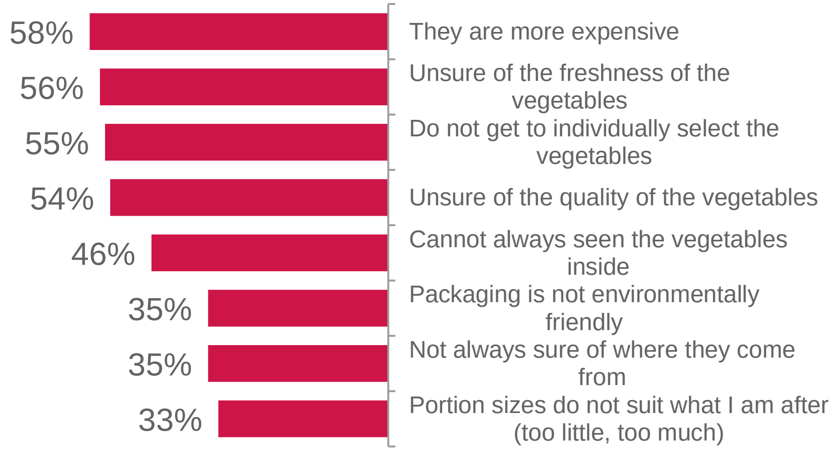
Presenting vegetables in packaged formats can be a trigger to purchase

Although negative perceptions exist, they can be easily overcome.

- ✓ People value the convenience and information that packaged vegetables can provide. They are quick to ‘grab and go’ (saving time in store) and easy to prepare and unpack (saving time at home).
- ✓ The price is often discounted and/or comparable to ‘loose’ alternatives. And for some, the portions offered are exactly the amount they require for their uses.
- ✓ The ability for product information to be presented on packaging is a huge advantage for the consumer.

To easily overcome barriers to purchasing packaged vegetables, the product must be good value for money, allow the consumer to see ‘inside’ the packaging, offer a range of portion sizes, and not use an abundance of unnecessary packaging material.


Positive Attributes

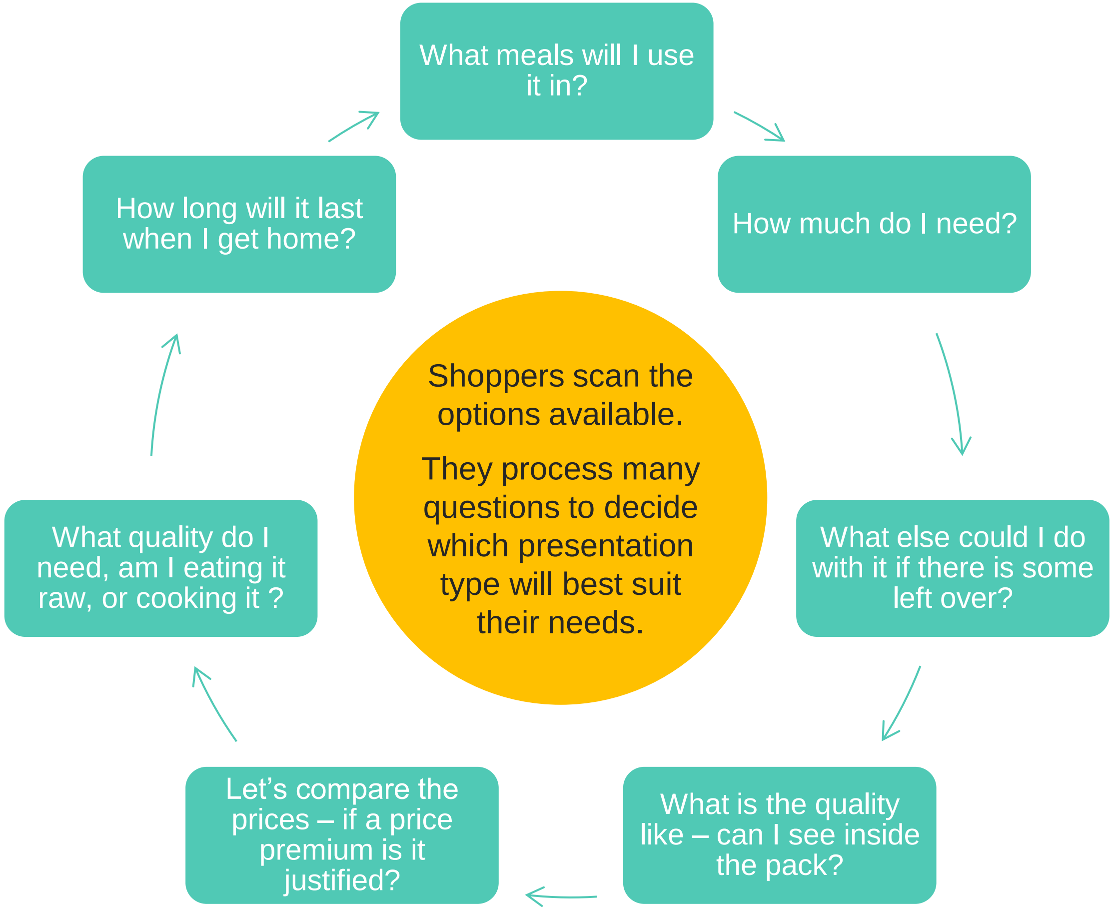

Negative Attributes

Q19 Thinking about buying vegetables IN A PACK or PRE-PREPARED, what are the POSITIVE things?
Q20 And what are the NEGATIVE things about buying vegetables IN A PACK or PRE-PREPARED?

Packaged or loose? In-store, shoppers process a set of complex questions to decide which format suits their needs.

Packaged products offer a clear advantage of having the actual packaging as a channel for communicating desired information to the shopper

- Away from the store, many people express strong opinions about their preference for or against packaged, loose and prepared vegetables.
- However, in store the actual decision making process is much more sophisticated.
- With a need in mind, shoppers scan what is available to them. Then, through a series of questions and trade offs, they determine which presentation type will best suit their needs.
- The clear benefits of packaged products are the ease of 'grabbing' in store, the opportunity for information about the product to be promoted, and clues about uses, quality, storage and nutritional information.



What meals will I use it in?

How much do I need?

What else could I do with it if there is some left over?

What is the quality like – can I see inside the pack?

Let's compare the prices – if a price premium is it justified?

What quality do I need, am I eating it raw, or cooking it ?

How long will it last when I get home?

Shoppers scan the options available.

They process many questions to decide which presentation type will best suit their needs.

Purchasing packaged or loose is a 'by occasion' preference.

Packaging presents a valuable channel to provide consumers with everything they say they need to know to encourage greater purchasing

Many vegetables in-store are displayed with no more than a name and price. Customers need so much more to trigger purchase

Packing can do more to address consumer needs.

For loosely sold vegetables, information should be displayed at the point of sale.

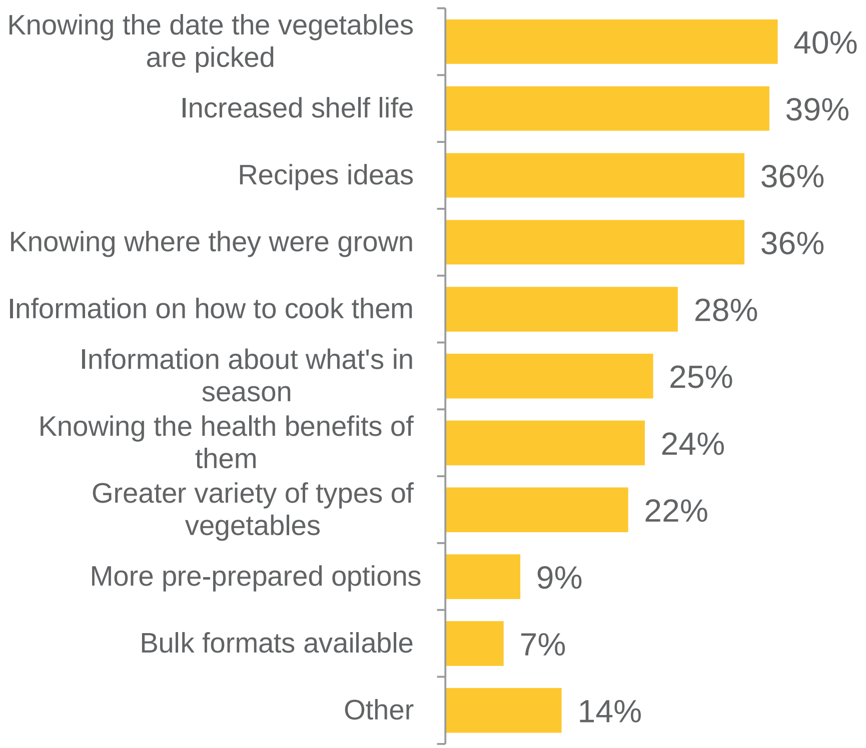
Most important to increase quantity bought:

Eager Explorers
Harvest dates
&
Location of grower

Flavour Followers
Recipe ideas
&
Increased shelf life

Wholesome Habits
Increased shelf life ▲
&
Harvest dates

Conscious Improvers
Harvest Dates
&
Recipe ideas



What consumers want to know

Q17 What would encourage you to purchase MORE FRESH vegetables?

▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

Encouraging Increased Purchase in the Future.

There will be an increase in cooking of Asian cuisine; Thai, Chinese and Vietnamese in particular.

Australian (meat/veg & roasts) and Italian are currently cooked by the majority of consumers.

Popularity of Asian Cuisine to increase

Top 3 future trends by segment

Eager Explorers

Like to cook more:

- Vietnamese (34%) ▲
- Japanese (33%) ▲
- Middle Eastern (32%) ▲

Flavour Followers

Like to cook more:

- Chinese (31%)
- Thai (27%)
- Vietnamese (23%)

Wholesome Habits

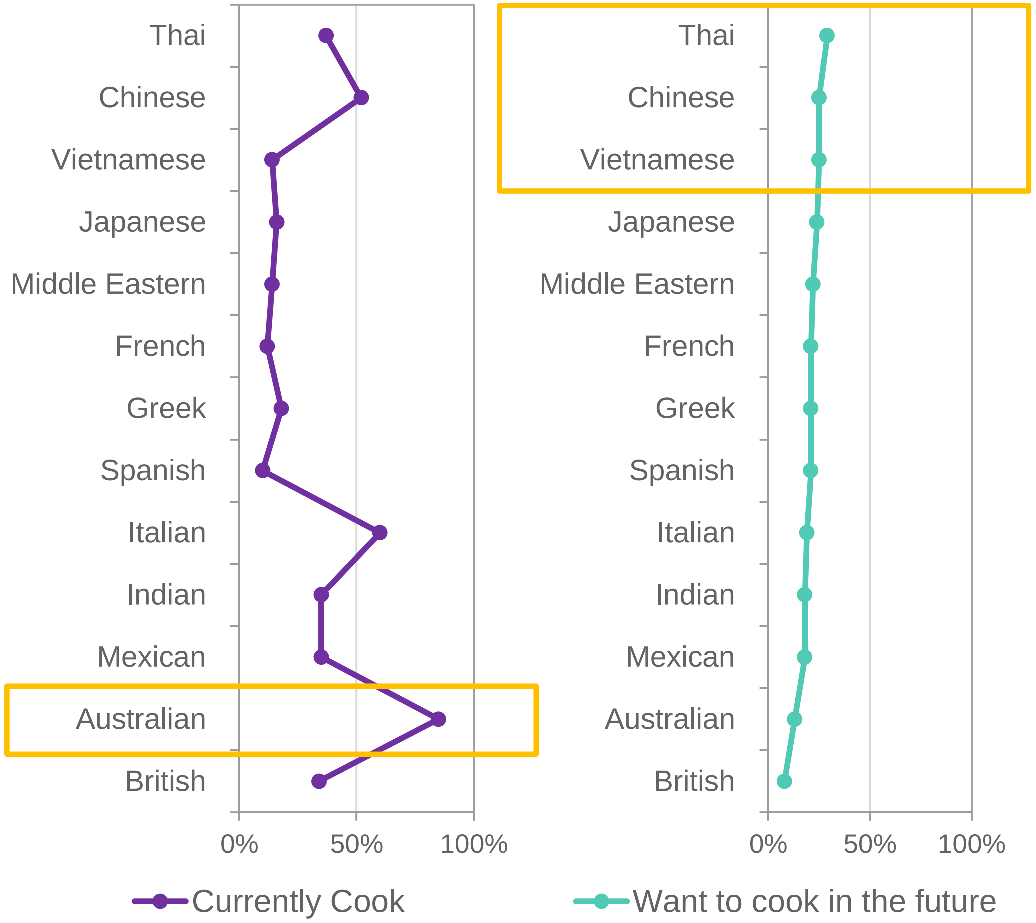
Like to cook more:

- Chinese (27%)
- Thai (27%)
- Italian (21%)

Conscious Improvers

Like to cook more:

- Thai (29%)
- Chinese (24%)
- Vietnamese (24%)



Q13a I currently cook/eat this cuisine/style. (MR) (Base: All respondents)
Q13b I would like to cook/eat more of (or start to cook/eat) this cuisine/style (MR) (Base: All respondents)

▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

Promoting Asian ideas

Each segment has key triggers they will respond positively to

An opportunity exists for growers and retailers to assist buyers in their quest to cook more Asian influenced meals. Buyers are ready to learn!

- Communicate Asian inspired ideas, ingredients, health benefits, taste expectations and flavour combinations.
- Recipe cards/recipe websites, magazines and in-store displays are valued & utilised channels.
- Tap into ideas for meal occasions beyond dinner; such as breakfast, lunch, snacks.

Eager Explorers

TRIGGERS: Vegetable tastes, textures, uses, preparation methods and commentary flavour combinations.

Flavour Followers

TRIGGERS: Taste and flavour expectation, how new ingredients compare to familiar flavours.

Wholesome Habits

TRIGGERS: How familiar meal ideas can have a simple ‘Asian’ twist, and Asian preparation & cooking methods for current repertoire.

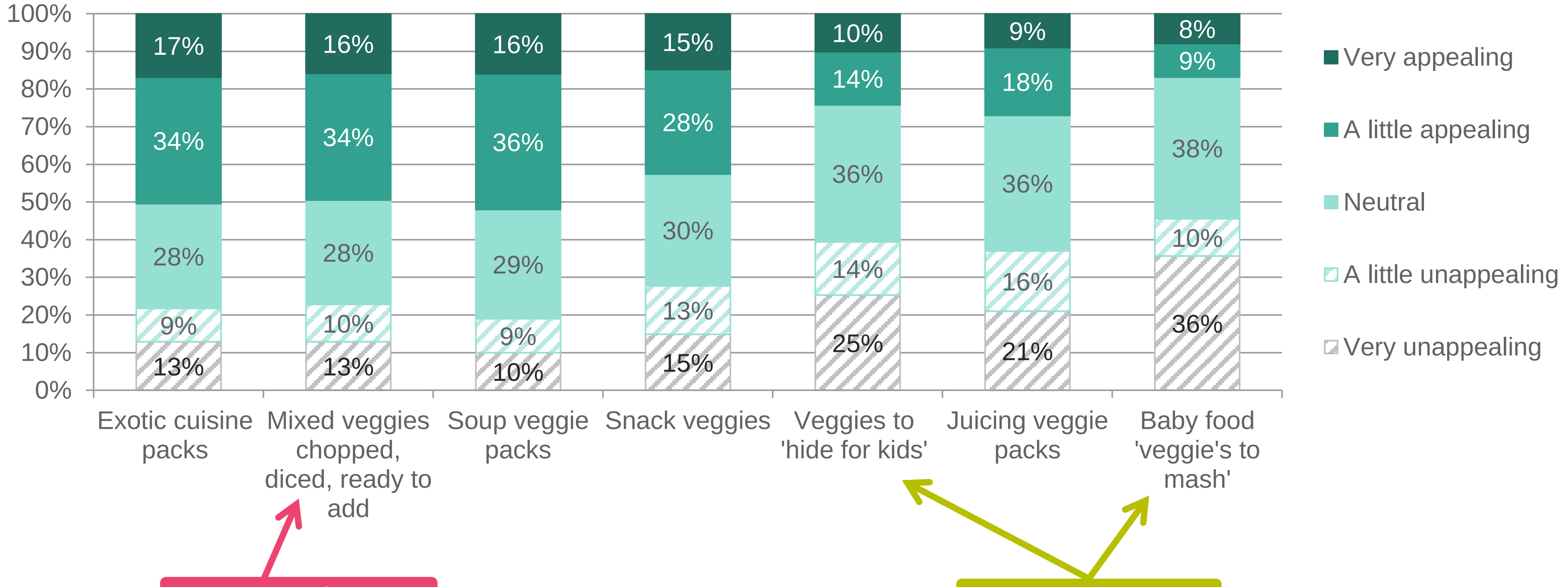
Conscious Improvers

TRIGGERS: Exceptional health benefits, best way to prepare, cook, use to maximise benefits.

! Be aware that some consumers told us they presume ‘Asian Greens’ are grown in Asia. Highlight ‘Australian Grown’.

Exotic cuisine packs with sauces and vegetables and mixed veggie packs are most appealing to consumers

Appeal was relatively consistent across all segments



Eager Explorers

Significantly less appealing; therefore this idea is not for those seeking new tastes and flavours and ideas.

Primary Targets: FLAVOUR FOLLOWERS, WHOLESOME HABITS, CONSCIOUS IMPROVERS.

Conscious Improvers

Significantly more appealing; therefore these ideas are relevant for those seeking enhanced health benefits.

Primary Target: CONSCIOUS IMPROVERS.

Q21. Below are a list of new ideas that people have told us they would like to see in-store. For each idea tell us how appealing they are to you? (Base: All respondents)

There are multiple strategies to encourage purchase of new vegetables.

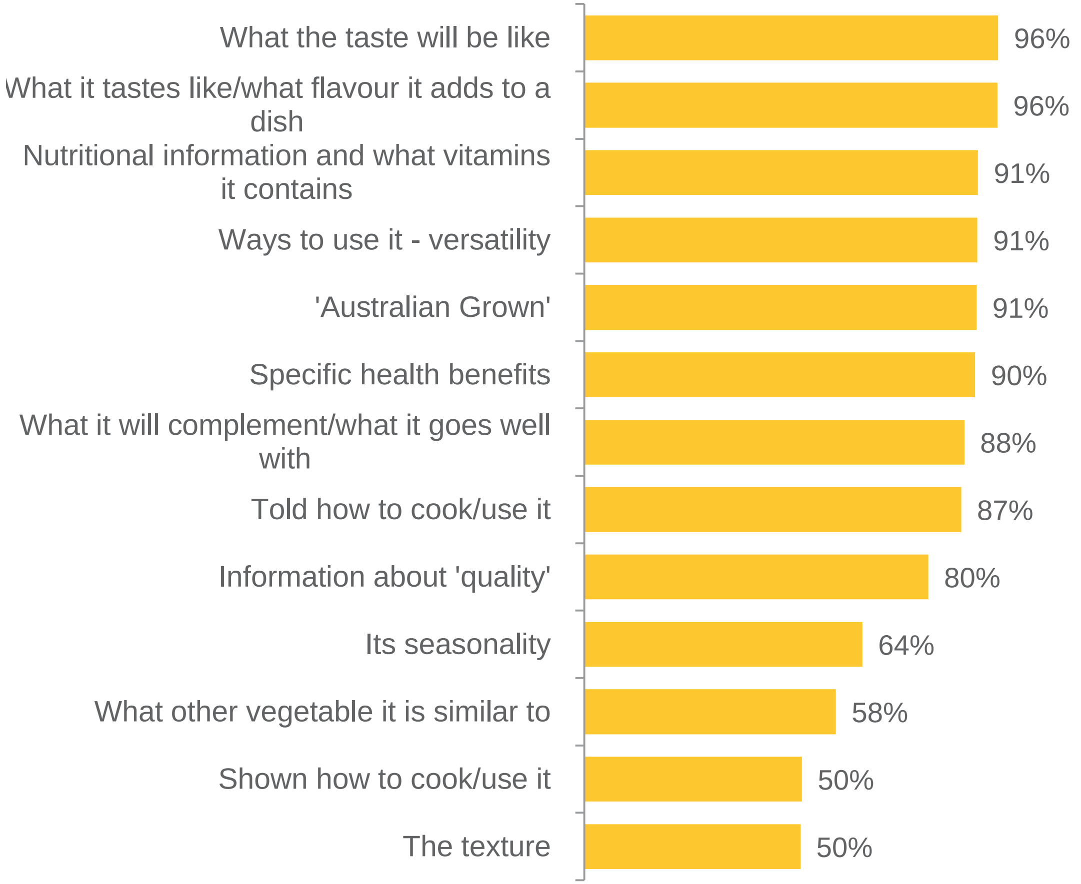
Overall, the most important are taste and flavour descriptors, nutritional information and suggestions of use.

Taste

is crucial

Most important for introducing new vegetables:

Eager Explorers	Flavour Followers	Wholesome Habits	Conscious Improvers
What flavour/ taste will it add	What does it taste like	Ways to use it	Nutritional information



Q26. Imagine you are shopping one day and you see a brand new vegetable in the store. What do you need to know or see to try this new vegetable?

Traditional channels, such as family, friends and cook books are primary sources of information. Influential media channels are TV, magazines and websites

Most influence occurs outside of the store, before shopping

Word of Mouth

recommendations

Differences across segments

Eager Explorers

Most valued; Cook books
- Cookbooks ▲
- Magazines ▲
- In-store displays ▲

Flavour Followers

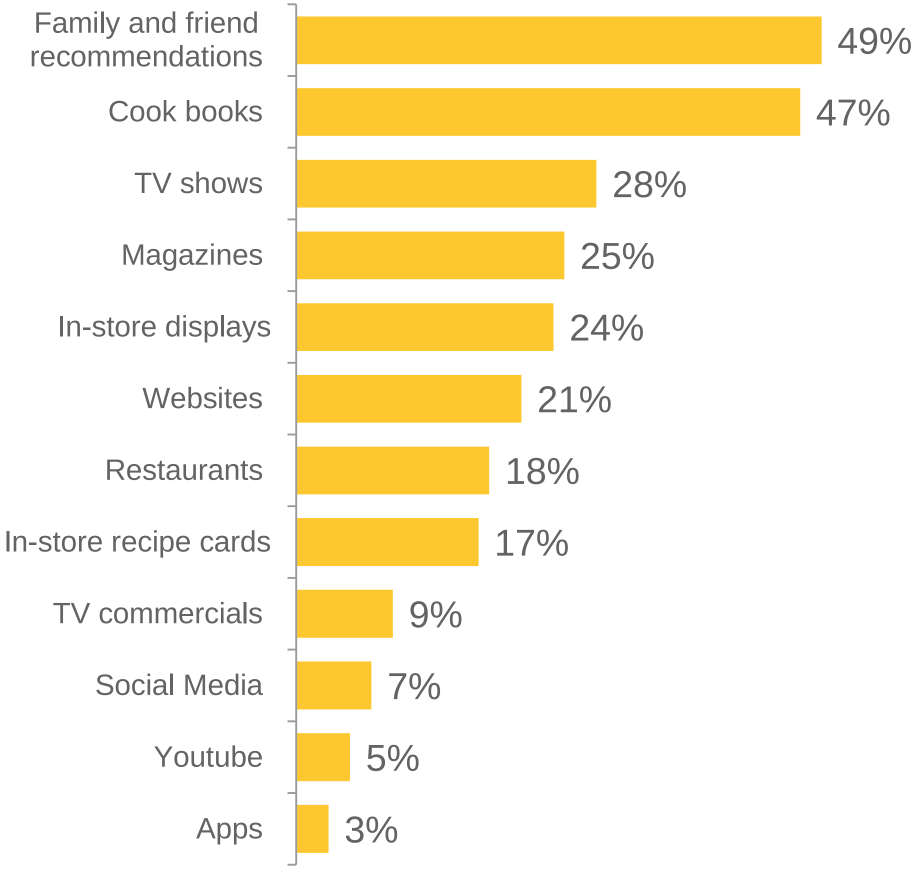
Most valued; Family/friends

Wholesome Habits

Most valued; Family/friends
- Cookbooks ▼
- Magazines ▼
- Restaurants ▼

Conscious Improvers

Most valued; Cook books



Q23 When it comes to purchasing new vegetables where do you take recommendations and inspiration from?

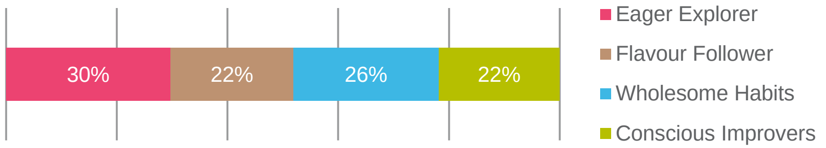
▲ Significantly HIGHER compared to total sample at 95% confidence.

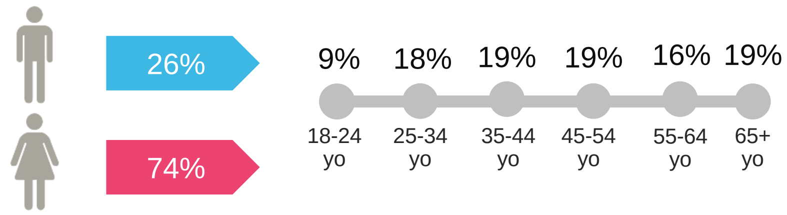
▼ Significantly LOWER compared to total sample at 95% confidence.

Vegetable Portraits – at a glance.

Carrot 91% (regularly consume)

Who am I? What do I do?





$101-150 pw Spend on Groceries

$11-20 pw Spend on Vegetables

Purchase Location

Woolworths	coles	Local Green Grocer
61%	57%	46%

Dietary Requirements

76% None	10% Weight Management	5% Vegetarian

Magazines

Better Homes and Gardens	The Australian Women's Weekly	that's life!
14%	12%	8%

Lifestyle TV Shows

m	MKR My Kitchen Rules	Jamie Oliver
32%	31%	29%

Websites

f	ebay	YouTube	taste.com.au	Australian Government Bureau of Meteorology
58%	36%	35%	27%	21%

How to encourage greater carrot consumption?

Why Carrots?

Taste 69%

Easy 67%

Healthy 66%

Why Not Carrots?

Shelf Life 47%

Expensive 41%

Poor quality 32%

Purchase more?

Date picked 42%

Shelf Life 39%

Where picked 36%

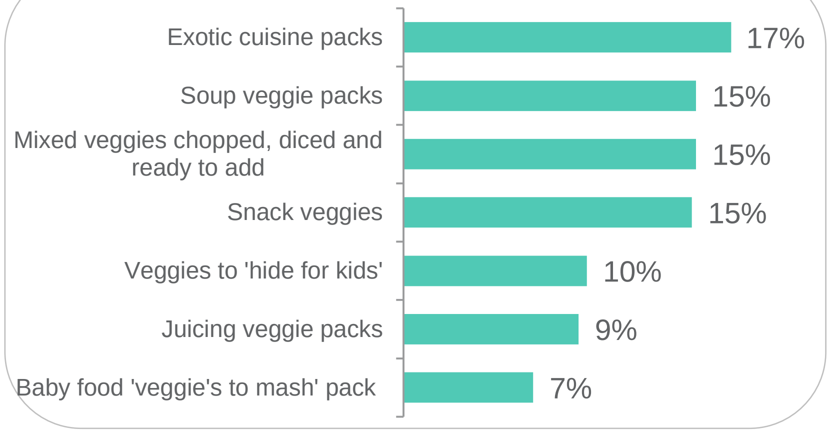
Inspiration Source?

Family & Friends 50%

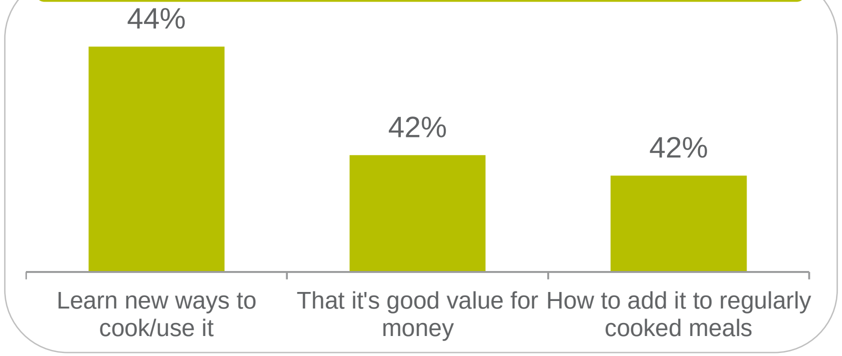
Cook Books 48%

TV Shows 28%

NPD % 'Very Appealing'



Converting non-buyers



Top 3 Other vegetables

Tomato 93%

Potato 92%

Lettuce 85%

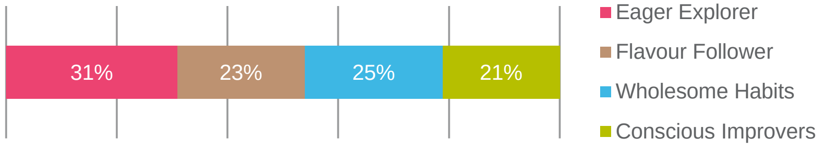
▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

colmar brunton.

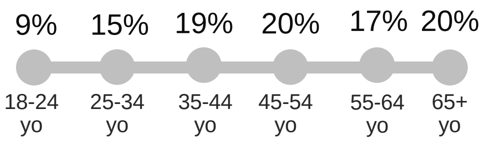
Lettuce 82% (regularly consume)

Who am I? What do I do?



26%

74%



$101-150 pw Spend on Groceries

$11-20 pw Spend on Vegetables

Purchase Location

Woolworths	Coles	Local Green Grocer
63%	57%	46%

Dietary Requirements

None	Weight Management	Vegetarian
76%	10%	5%

Magazines

Better Homes and Gardens	The Australian Women's Weekly	Take 5 magazine
14%	12%	8%

Lifestyle TV Shows

MasterChef	MKR My Kitchen Rules	Jamie Oliver
32%	31%	31%

Websites

Facebook	ebay	YouTube	taste.com.au	Australian Government Bureau of Meteorology
57%	36%	35%	29%	22%

How to encourage greater lettuce consumption?

Why Lettuce?

Taste
71%

Easy
68%

Healthy
68%

Why Not Lettuce?

Shelf Life
47%

Expensive
41%

Poor quality
32%

Purchase more?

Date picked
43%

Shelf Life
40%

Where picked
38%

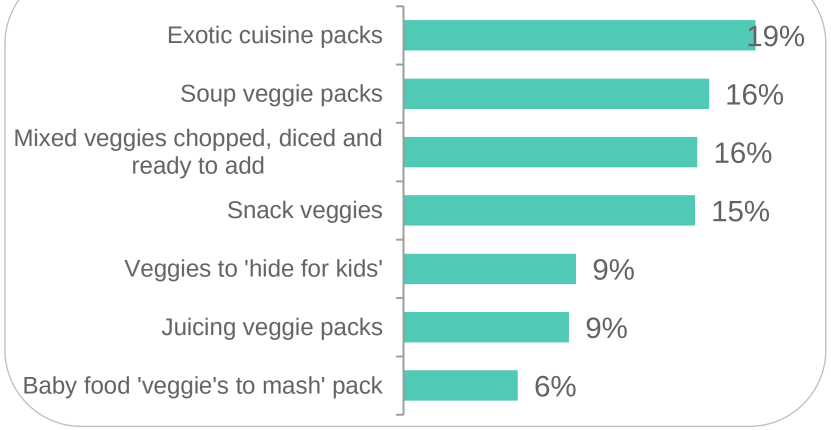
Inspiration Source?

Family & Friends
49%

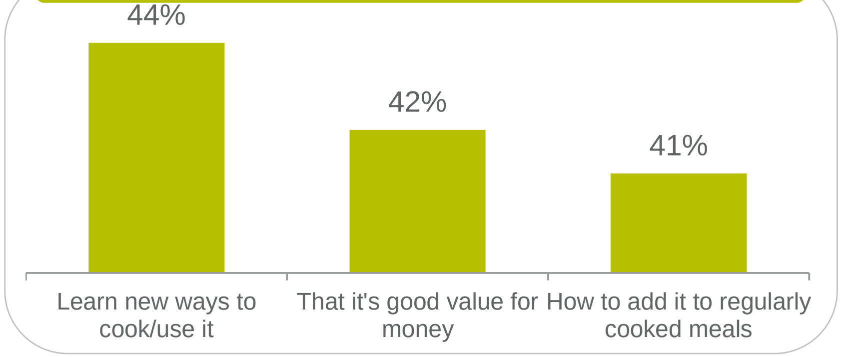
Cook Books
48%

TV Shows
29%

NPD % 'Very Appealing'



Converting non-buyers



Top 3 Other vegetables

Tomato
95%

Carrot
94%

Potato 93%

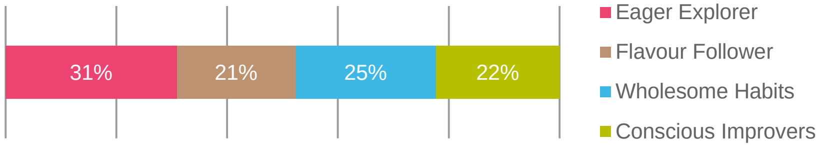
▲ Significantly HIGHER compared to total sample at 95% confidence.

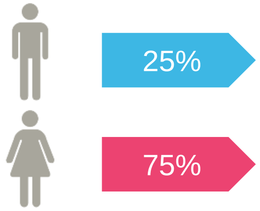
▼ Significantly LOWER compared to total sample at 95% confidence.

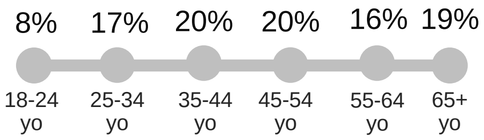
colmar brunton.

Broccoli 78% (regularly consume)

Who am I? What do I do?







$101-150 pw Spend on Groceries

$11-20 pw Spend on Vegetables

Purchase Location

Woolworths	Coles	Local Green Grocer
60%	57%	49% ▲

Dietary Requirements

75%	10%	5%
None	Weight Management	Vegetarian

Magazines

Better Homes and Gardens	The Australian Women's Weekly	that's life!
14%	12%	8%

Lifestyle TV Shows

m	MKR My Kitchen Rules	Jamie Oliver
34%	32%	30%

Websites

f	You Tube	ebay	taste.com.au	Australian Government Bureau of Meteorology
57%	35%	35%	29%	22%

How to encourage greater broccoli consumption?

Why Broccoli?

Taste 71%

Easy 70%

Healthy 69%

Why Not Broccoli?

Shelf Life 47%

Expensive 41%

Poor quality 34%

Purchase more?

Date picked 43%

Shelf Life 43%

Where picked 43%

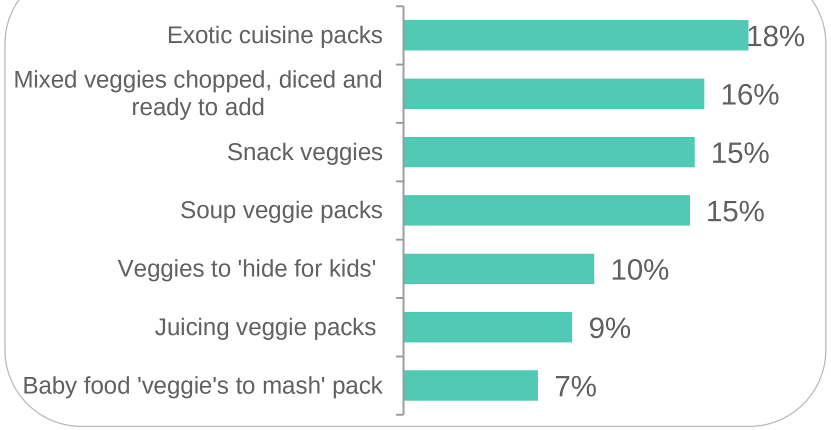
Inspiration Source?

Family & Friends 50%

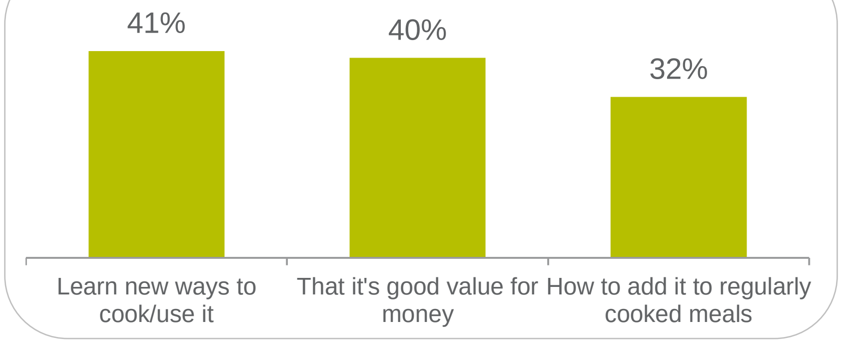
Cook Books 48%

TV Shows 30%

NPD % 'Very Appealing'



Converting non-buyers



Top 3 Other vegetables

Carrot 95%

Tomato 92%

Potato 92%

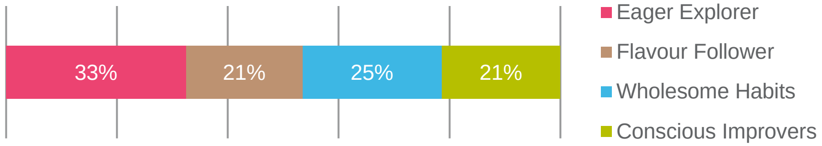
▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

colmar brunton.

Cucumber 71% (regularly consume)

Who am I? What do I do?



Male	26%
Female	74%

18-24 yo	25-34 yo	35-44 yo	45-54 yo	55-64 yo	65+ yo
8%	18%	19%	19%	16%	21%

$101-150 pw Spend on Groceries

$11-20 pw Spend on Vegetables

Purchase Location

Woolworths	Coles	Local Green Grocer
61%	57%	46%

Dietary Requirements

None	Weight Management	Vegetarian
76%	9%	5%

Magazines

Better Homes and Gardens	The Australian Women's Weekly	New Idea
15%	12%	8%

Lifestyle TV Shows

MasterChef	My Kitchen Rules	Jamie Oliver
34%	33%	32%

Websites

Facebook	YouTube	eBay	taste.com.au	Australian Government Bureau of Meteorology
56%	35%	34%	29%	21%

How to encourage greater cucumber consumption?

Why Cucumber?

Taste 71%

Healthy 68%

Easy 67%

Why Not Cucumber?

Shelf Life 47%

Expensive 42%

Poor quality 33%

Purchase more?

Date picked 43%

Shelf Life 39%

Where picked 39%

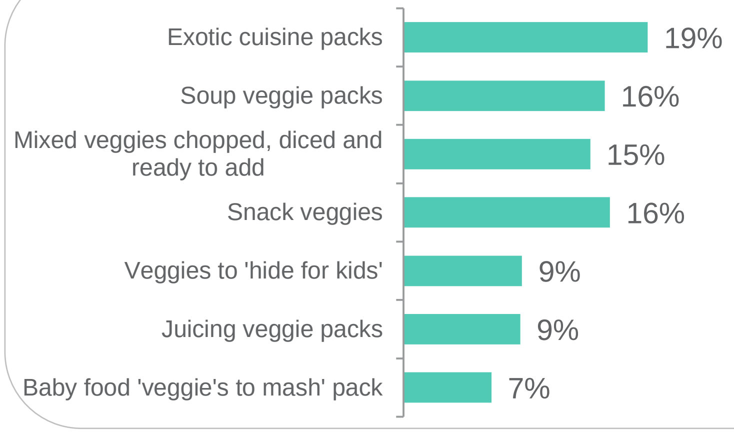
Inspiration Source?

Cook Books 50%

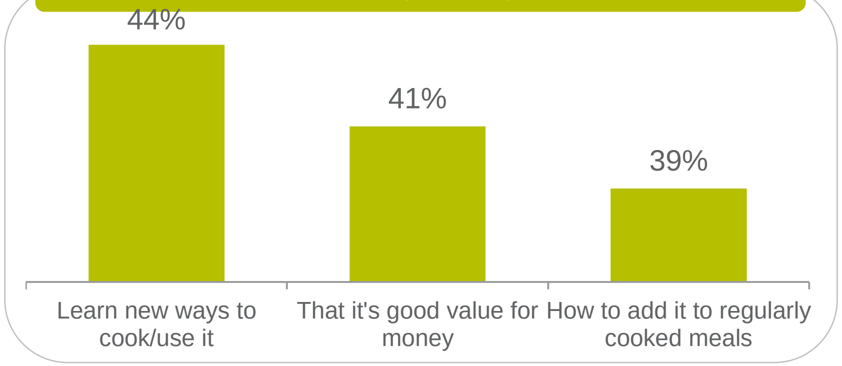
Family & Friends 49%

TV Shows 31%

NPD % 'Very Appealing'



Converting non-buyers



Top 3 Other vegetables

Tomato 96%

Carrot 95%

Potato 92%

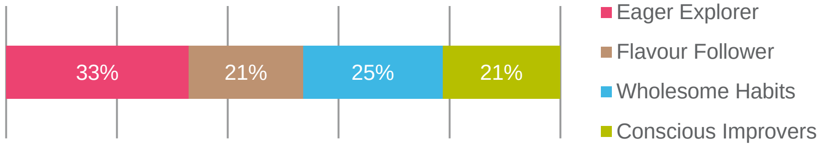
▲ Significantly HIGHER compared to total sample at 95% confidence.

▼ Significantly LOWER compared to total sample at 95% confidence.

colmar brunton.

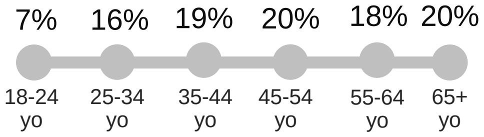
Pumpkin 70% (regularly consume)

Who am I? What do I do?



24%

76%



$101-150 pw Spend on Groceries

$11-20 pw Spend on Vegetables

Woolworths	coles	Local Green Grocer
62%	57%	47%

Purchase Location

None	Weight Management	Vegetarian
75%	10%	5%

Dietary Requirements

Better Homes and Gardens	The Australian Women's Weekly	New Idea
16%	13%	8%

Magazines

MKR My Kitchen Rules	MasterChef	Jamie Oliver
35%	34%	3

Lifestyle TV Shows

%

Facebook	ebay	YouTube	taste.com.au	Australian Government Bureau of Meteorology
57%	36%	32%	▲ 32%	22%

Websites

How to encourage greater pumpkin consumption?

Why Pumpkin?

Taste 73%

Healthy 68%

Easy 68%

Why Not Pumpkin?

Shelf Life 46%

Expensive 44%

Poor quality 35%

Purchase more?

Date picked 44%

Shelf Life 40%

Where picked 39%

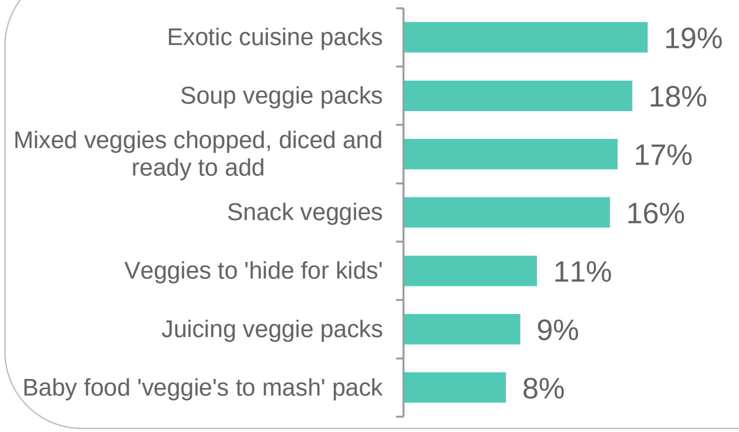
Inspiration Source?

Cook Books 52%

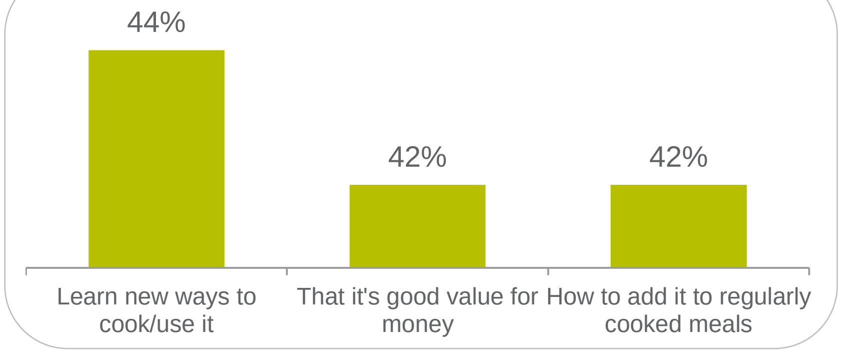
Family & Friends 49%

TV Shows 32%

NPD % 'Very Appealing'



Converting non-buyers



Top 3 Other vegetables

Tomato 95%

Carrot 95%

Potato 95%

▲ Significantly HIGHER compared to total sample at 95% confidence.

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colmar brunton.

Recommendations to encourage growth and be relevant across segments.

To increase purchase of popular staples

Key insights and recommendations for vegetables that make up people's core 17 commodities

1

These commodities are routinely purchased, therefore driven by habit and less impacted by quality and price

2

In-store consumers don't actively look for inspiration, new ideas or cooking methods because they are content with what they are doing

3

Consumers already understand the taste, flavours and texture delivered and are confident in cooking these commodities

4

The role and uses of staple vegetables is stagnating and eating occasions are currently limited to dinner time

to do list

✓ Trigger new eating occasions outside of dinner time.

- Primary market; Whilst all segments are loyal to these commodities, the easiest segments to encourage greater volume of purchase are the **Wholesome Habits** and **Flavour Followers.** They already purchase staples, and are not looking to try new vegetables.
- Provide meal occasion ideas – both at point of sale (information triggers) and products formats (lunch & snack sizes)
- Provide convenience formats – packaged, prepared, that only include core popular staples (introduction of new vegetables will increase risk)
- Be aware of price sensitivity, and communicate 'value for money' facts at point of sale.
- Promote the 'ease of cooking' popular staples in simple ways.

To increase purchase of ‘Superfoods’

Key insights and recommendations for vegetables such as Cauliflower, Kale, Silverbeet & Spinach

1 The word ‘superfood’ appeals to consumers who are converted to the idea of vegetables being able to offer benefits beyond ‘general health’

2 There is a growing openness among many to include superfoods in their diet, yet a lot of this is still ‘talk’, with the knowledge and skills still to learn

3 Scepticism exists for some who see ‘superfoods’ as a gimmicky label, often commanding a perceived and unjustified inflated price

4 With nutrient benefits as the strength, ‘superfoods’ are not thought to be very tasty. Many people stick to choosing tastes they know and like thus avoiding ‘superfoods’

to do list

- ✓ Demystify the meaning of ‘super’, clearly articulating the nutrient qualities.
- ✓ Do not forget that taste drives half the market, and taste expectations are required to encourage purchase.
- Primary target are the **Conscious Improvers.** Be clear about the health benefits. Outline vitamin breakdowns, relate these vegetables to good health and well being, be specific in nutrient benefits.
- Secondary market are the **Eager Explorers.** Promote the flavour benefits and provide information on how the veggie is used in varying cuisines.
- Both segments are open and interested to try something new, therefore, approach local hospitality businesses about featuring locally grown, ‘Superfood’ vegetables on their menu to spark the interest of consumers.

To increase purchase of less frequently purchased vegetables

Key insights and recommendations such as Kohlrabi, Artichoke, Fennel, Squash & Radish

1

Low purchase is often related to knowing little more than the name and price of these vegetables. Without knowledge of flavour or health benefits, these commodities are overlooked

2

Awareness of name is high (people know they exist) but either don't see and/or recognise them in-store

3

Purchase is often driven by a specific recipe choice, beyond this consumers don't know what to do with them

4

These vegetables are not intimately linked with a specific cuisine or cooking style and therefore are not considered a 'must have'

to do list

- ✓ Provide greater information at point of sale and on packs about flavour, health benefits and recipe ideas to encourage purchase.
- ✓ Take up any opportunity to provide in-store samples and tastings to familiarise and excite people looking for new things.
  - Primary target are **Eager Explorers.** Provide them with flavour messaging and what new and exciting elements the vegetable will provide. Use popular websites such as taste.com and retail/cooking magazines to promote recipe ideas.
  - Secondary market: Provide **Conscious Improvers** with information about your vegetable's health benefits. This includes the best way to prepare and cook them to harness the most nutrients. Ways to eat these vegetables raw will appeal.

To increase purchase of ‘tasty’ vegetables

Key insights and recommendations for vegetables such as Sweet Corn, Sweetpotato, Capsicum & Chilli

1

The good things about these vegetables are that taste and flavour expectations have been clearly established

2

Colourful in-store displays attract and communicate taste and freshness

3

When the taste of a vegetable appeals, people are more open to finding ways to incorporate into more meals

4

Some vegetables (such as Fennel & Chilli) are only used in small amounts to reduce the risk of ‘over powering tastes’

to do list

✓ Link colour and imagery to communicate tastes and flavour

- Half of the market is driven my taste – capture their attention through taste promotion.
- Primary target are the **Eager Explorers**, they are open to experimentation and are more likely to spend on fresh vegetables. To attract these consumers tell them what taste your vegetable will bring and new ways that they can cook and use your vegetable. In-store displays that are colourful and promote freshness and quality will appeal.
- Secondary market: **Flavour Followers**. They want to know about the flavour, texture and the taste that the vegetable will bring to their dish before they buy. Recipe ideas in-store are a great way to communicate with this consumer. Be clear on setting expectations, as experimentation is not appealing for this segment.

To increase purchase of ‘colourful’ vegetables

Key insights and recommendations for vegetables such as Rainbow Chard, Purple Carrots, Green Cauliflowers & White Zucchini

1

Most commonly people understand ‘dark green’ is good for iron; there is little knowledge about other colours

2

The orange in carrots is good for eyesight …this believed by some, a childhood myth for others

3

For other colours, such as purple and red, the benefit is thought to be aesthetic only and a bit ‘gimmicky’; there lacks a clear reason to buy

4

Some people remember school lessons that promoted ‘you should eat a rainbow every day’,….but the rationale for why this is the case has been forgotten

to do list

- ✓ Give colour a purpose, over and above aesthetics.
- ✓ Promote the ‘vegetable colour wheel’.
- ✓ Be specific about the colour benefits ie. relate colours to their respective vitamins and health outcomes.
  - Primary target are **Conscious Improvers** because they want to get the best nutrition out of the vegetables they consume. Engage consumers at the store level with information about each colour category, and the vegetables that fit with each one.
  - Secondary market are the **Wholesome Habits.** They know they should include vegetables from each colour category in their diet.

To increase purchase of 'baby vegetables'

Key insights and recommendations for vegetables such as Baby Cucumbers, Broccolini, Dutch Carrots, Mini-cabbage & Mini-Cauliflower

1

Appeal of 'baby' varietals is polarising. Are they an expensive novelty or do they hold advantages beyond the 'adult' competitor?

2

Confusion exists over which varietals are immature versions of the adult, and which are a varietal all to themselves.

3

Some people perceive the 'baby' to be highly concentrated with nutrients and taste. Others perceive them to be 'too young' to have had any benefits develop

4

Baby vegetables hold high appeal for those who value the aesthetics of their meals and their plates; also to those who know their children are enticed with 'special sized foods' just for kids.

to do list

- ✓ Aggressively promote benefits of baby vegetables as lunch box and snacking commodities.
- ✓ Position baby vegegtables for children. Make the purchase and consumption of these vegetables a fun family activity to engage all ages.
  - **Eager Explorers** and **Conscious Improvers** are primary targets for baby vegetables.
  - These consumer segments are open to extending their vegetable repertoires by introducing (and not cannibalising) varietals.
  - Clearly communicate the taste and nutrient differences compared to adult varietals to trigger introduction.

To increase purchase of vegetables with multiple varietals

Key insights and recommendations for vegetables such as Cucumber, Pumpkin, Asian Greens and Onions

1

People can feel overwhelmed, confused and generally lack knowledge of the differences between varietals

2

Commodities such as lettuce and lettuce leaves, tomatoes, and potatoes have successfully established clear uses, flavours and benefits of each type

3

For commodities such as Asian greens, cucumbers, and pumpkins, the distinct differences and uses for each varietal are less known

4

When distinctions are unknown, shoppers consider the experience/ reputation of one to cloud the category; what they feel about one type extends to all the others

to do list

- ✓ Be clear to identify and communicate the factors that distinguish each variety at point of purchase.
- ✓ Communicate the taste expectations and best use/cooking style for each.
- ✓ Highlight the health benefits that one has over another.
- ✓ Educate shoppers on how to substitute one variety for another
  - Primary Market: Tell **Eager Explorers** the flavour differences of each variety and which type best suits individual cooking styles and cuisines.
  - Secondary market: For **Flavour Followers,** provide information at the store level that enables this segment to successfully substitute varietals; they tend to stick to the ones they know.

To increase purchase of “old fashioned” traditional vegetables

Key insights and recommendations for vegetables such as Turnips, Swedes, Squash, Brussels Sprouts & Cabbage

1

vegetables such as Turnips, Swedes, & Brussels Sprouts are considered old fashioned, and foods of ‘childhood’; and often lack positive memories

2

Mum and grandma’s over boiling, mashing, watery cooking has resulted in the removal of these commodities from some people’s lives

3

As a result, younger generations have limited to no experiences with these vegetables

4

For those who value these vegetables, they are primarily associated with winter, soups and stews

to do list

- ✓ Re-launch, re-invigorate and excite a new audience.
- ✓ Promote seasonally/weather appropriate uses beyond the winter food associations.
  - Primary target: **Wholesome Habits** routinely buy your vegetables; but for the same uses each time. Ignite the opportunity to expand their consumption by introducing new uses beyond the traditional to increase quantity purchased.
  - Secondary market: Re-launch your vegetables to **Eager Explorers**, they are interested in taste, textures and cooking international cuisines. For example tell them how to use these vegetables in Moroccan or Asian dishes and the tastes and textures they will bring.

To increase purchase of Asian greens

Key insights and recommendations for vegetables such as Chinese Cabbage, Wombok, Buk Choy, Pak Choy, Spring Onions, White Radish & Snake Beans

1

In-store some people don't even see these vegetables, others are so overwhelmed by the varieties and names, and have no clues as to how to use them

2

Many people don't know what to do with specific Asian varietals. They wonder: "what are the rules?"

3

Some perceive the value of Asian vegetables to be the green colour and texture/crunch they add; however snow peas and beans can also achieve this

4

Presentation can hinder purchase. A large bunch is thought to be wasteful for a single household or one meal occasion

to do list

- ✓ Make product available in loose leaves.
- ✓ List the 'rules'. Include simple messages for how to incorporate them in cooking.
- ✓ Promote uses beyond stir fries and Asian favoured meals.
- ✓ Position authentic Asian vegetables with spring onions and other vegetables that are utilised in Asian cooking.
  - Primary target are **Eager Explorers**, however they are unsure of the 'rules'; what will each veggie bring to the dish and how is it best incorporated. Educate how to get the best out of each varietal.
  - Secondary market are **Conscious Improvers**, but they have a tendency to prefer other green vegetables due to known nutrient content; strengthen the health message compared to other green vegetables.

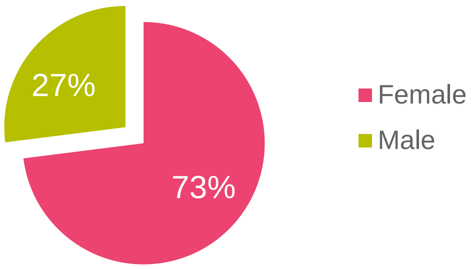
Appendix.

Demographics

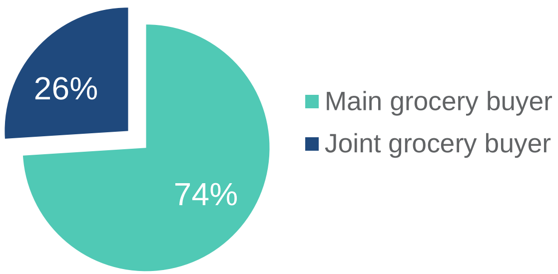
Demographics.

Participants in this research were all main or joint grocery buyers and reflected the national population.

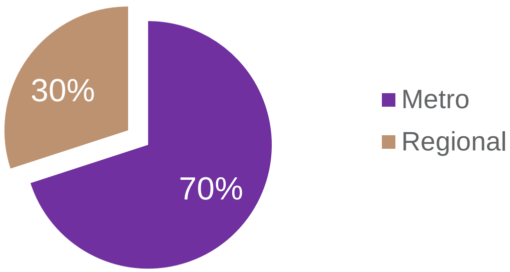
Gender



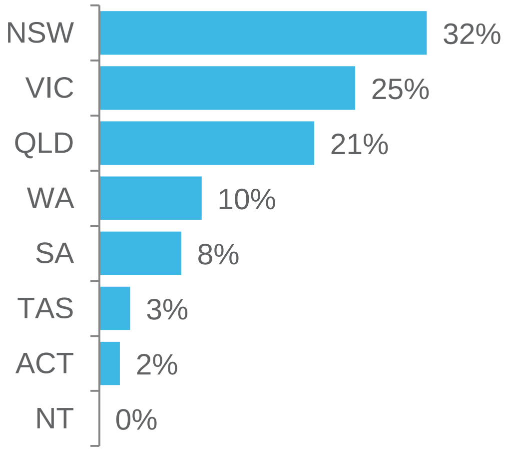
Grocery Involvement



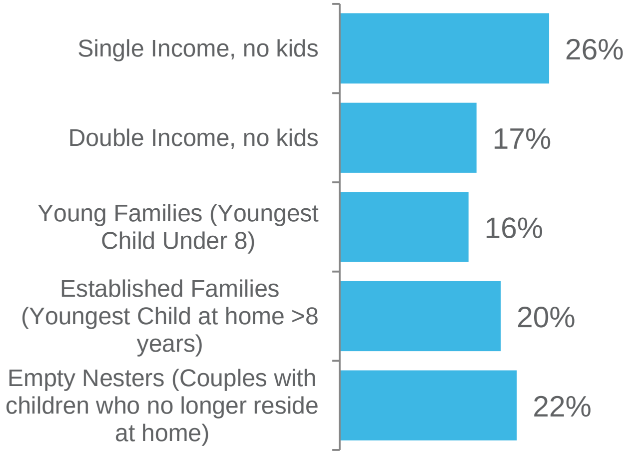
Location



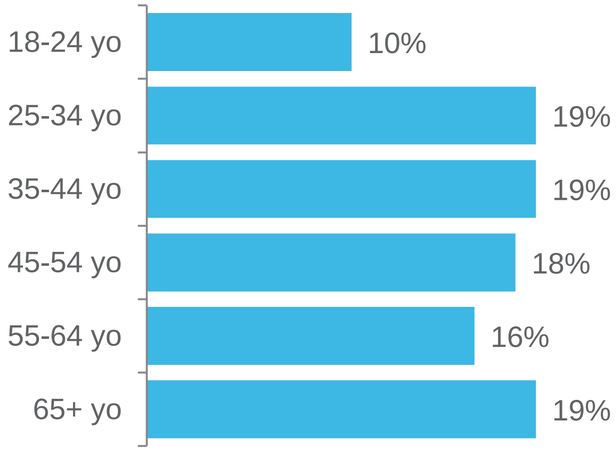
State



Household Structure



Age

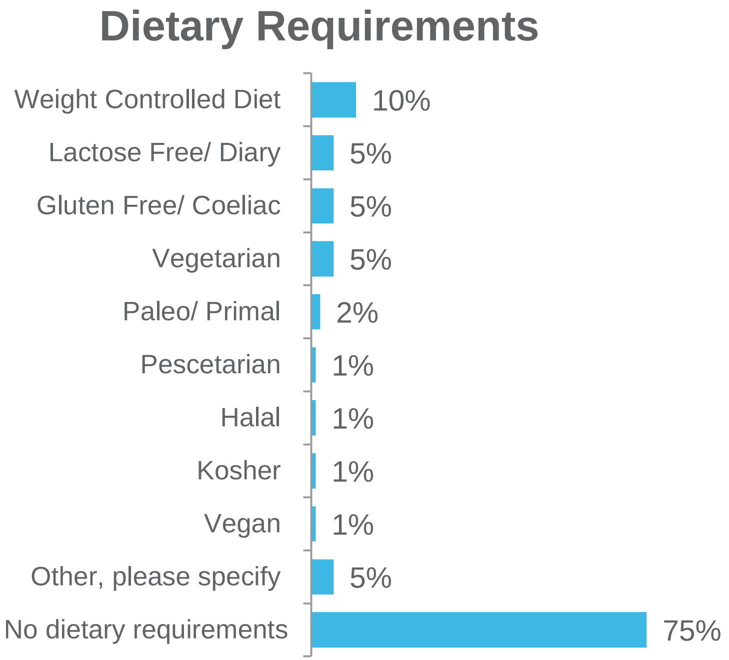


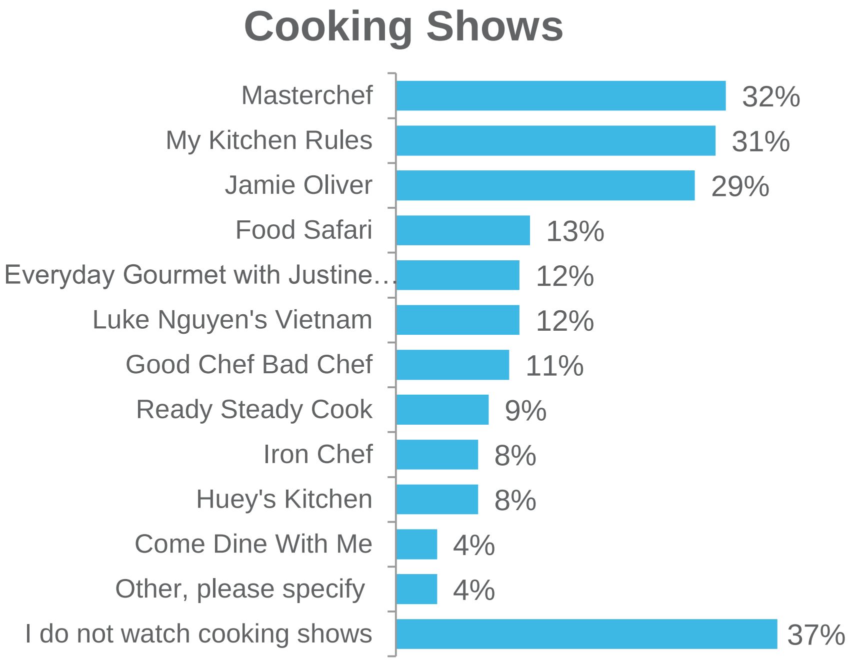
Please indicate your gender
Please indicate where you live
Which of the following age groups do you fall into?
Which of the following best describes your role in buying groceries for your household?
Which of the below best describes your household?

Diet and television.

Only one quarter of the population indicate that they have specific dietary requirements.

Around two-thirds of people watch television cooking shows; the most popular being Masterchef, My Kitchen Rules and Jamie Oliver.



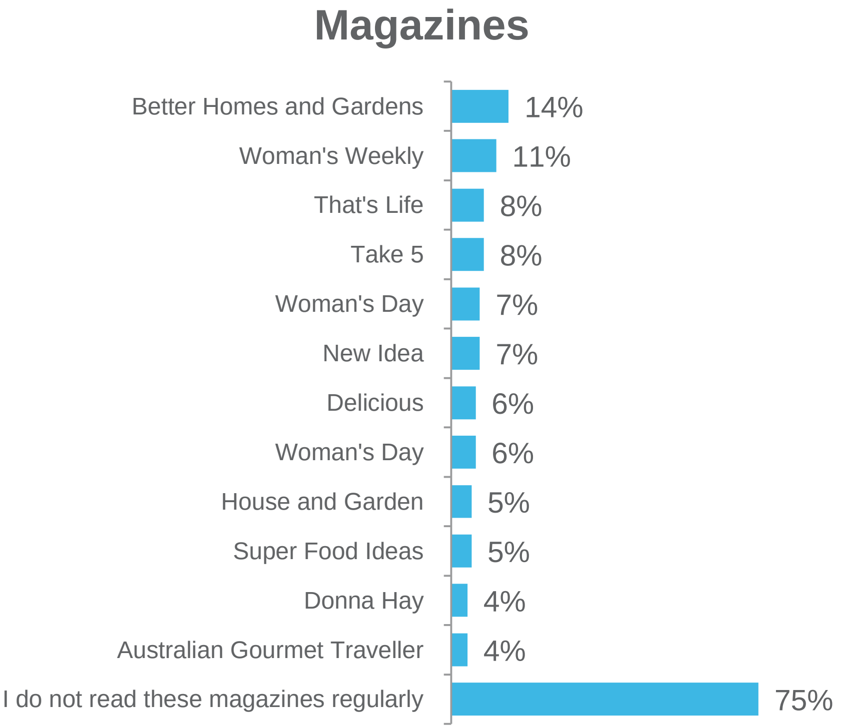


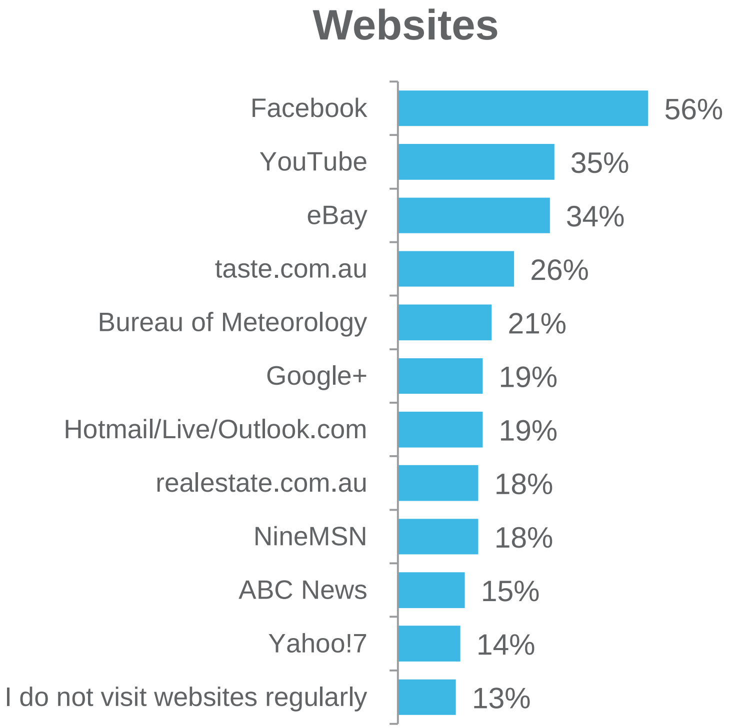
D1 Do you have any dietary requirements or have any diet preferences?
D3 What cooking shows do you watch regularly?

Lifestyle.

Hard copy magazines are regularly read by around a quarter of grocery buyers; the most popular being Better Homes and Gardens and Womens' Weekly.

Almost 9 in ten people visit websites regularly; for over half this is Facebook, and more than a quarter visit taste.com.

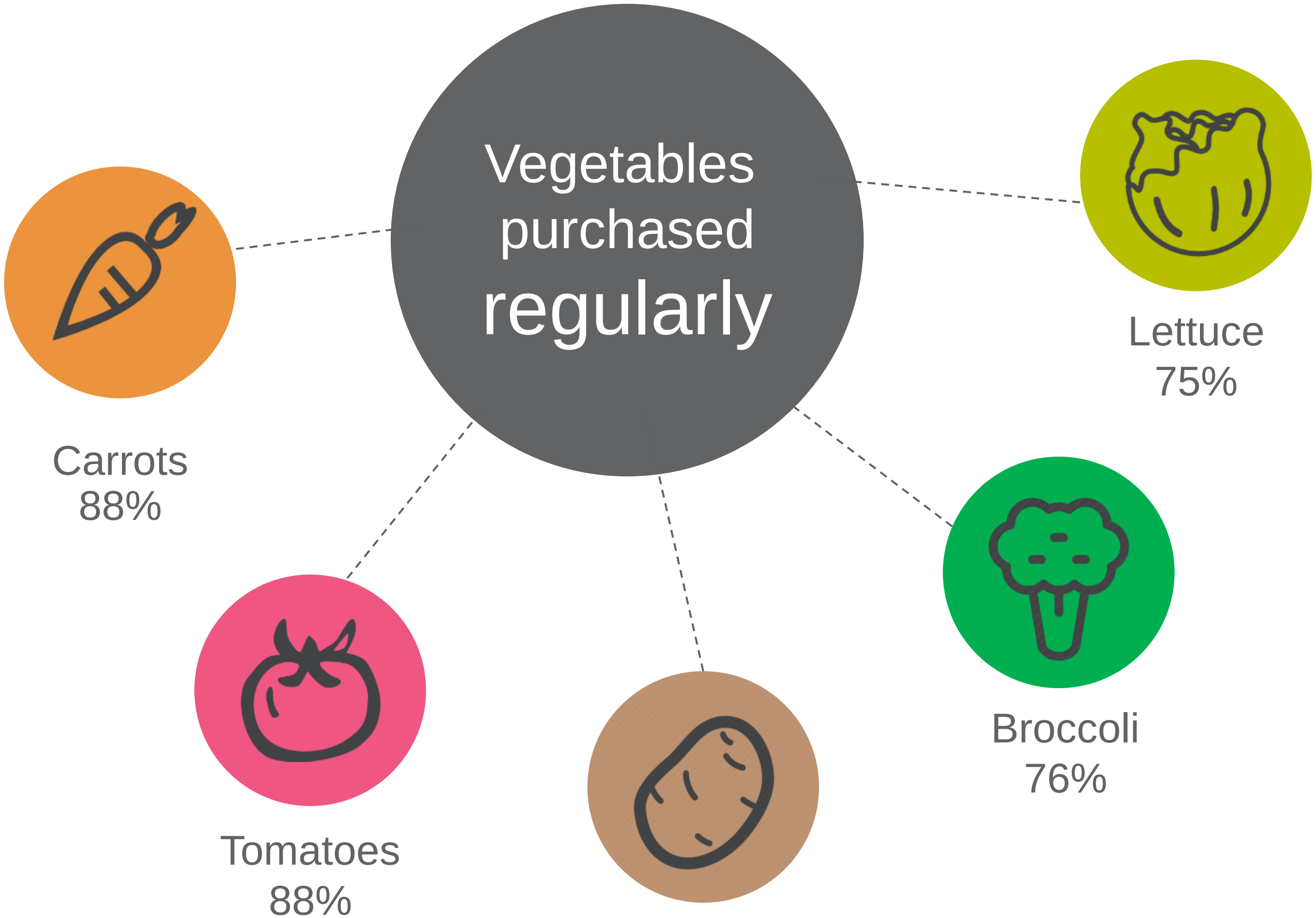




D4 What magazines do you read regularly?
D5 What online websites or blogs do visit regularly?

Usage.

Vegetable Staples



Vegetables purchased regularly

Lettuce
75%

Carrots
88%

Broccoli
76%

Tomatoes
88%

Potatoes
82%

Q2 Which of the following vegetables do you regularly purchase?

Basket combinations are reflective of vegetable staples.

Broccoli buyers are more likely to purchase pumpkin, whilst cucumber shoppers always purchase tomatoes.

Tomatoes- 91%
Potatoes- 90%
Lettuce- 83%
Broccoli- 79%
Cucumbers- 72%

Carrots- 94%
Tomatoes- 91%
Potatoes- 90%
Lettuce- 83%
Pumpkins- 75%

Carrots- 94%
Tomatoes- 94%
Potatoes- 91%
Broccoli- 79%
Cucumber- 76%

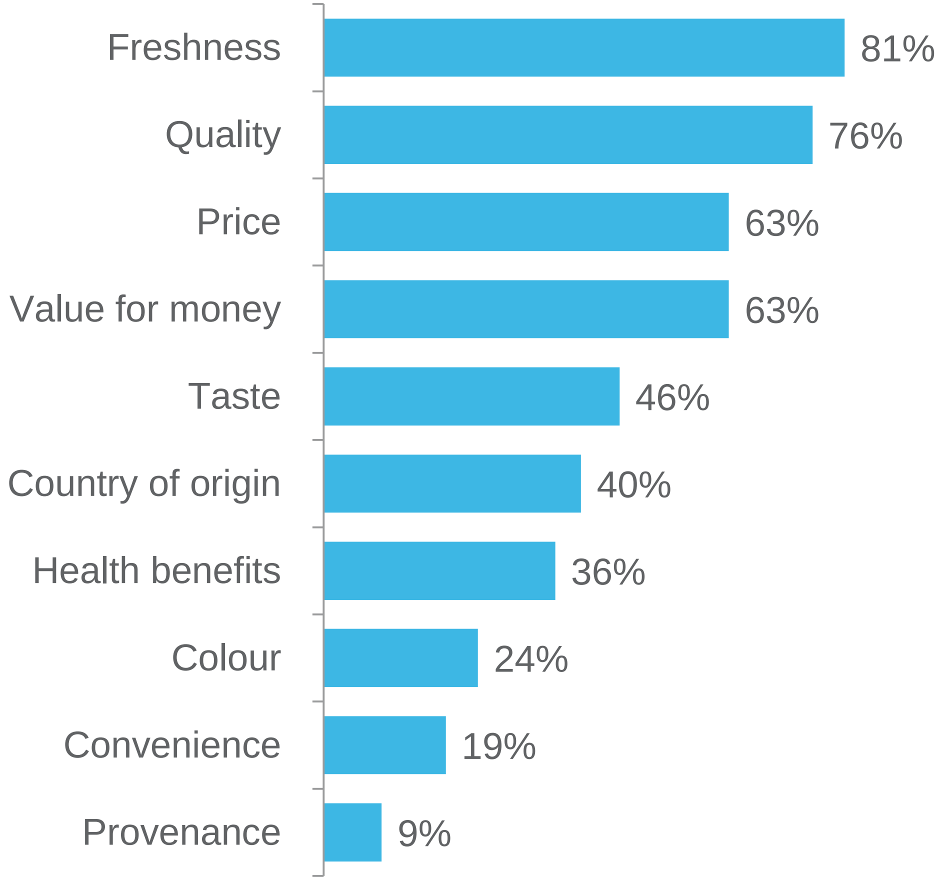
Tomatoes- 95%
Carrots- 94%
Potatoes- 90%
Lettuce- 88%
Broccoli- 81%

Q2 Which of the following vegetables do you regularly purchase?

In-store consumers are drawn to fresh vegetables. The quality of the produce is also a key influencer.

Freshness

is key

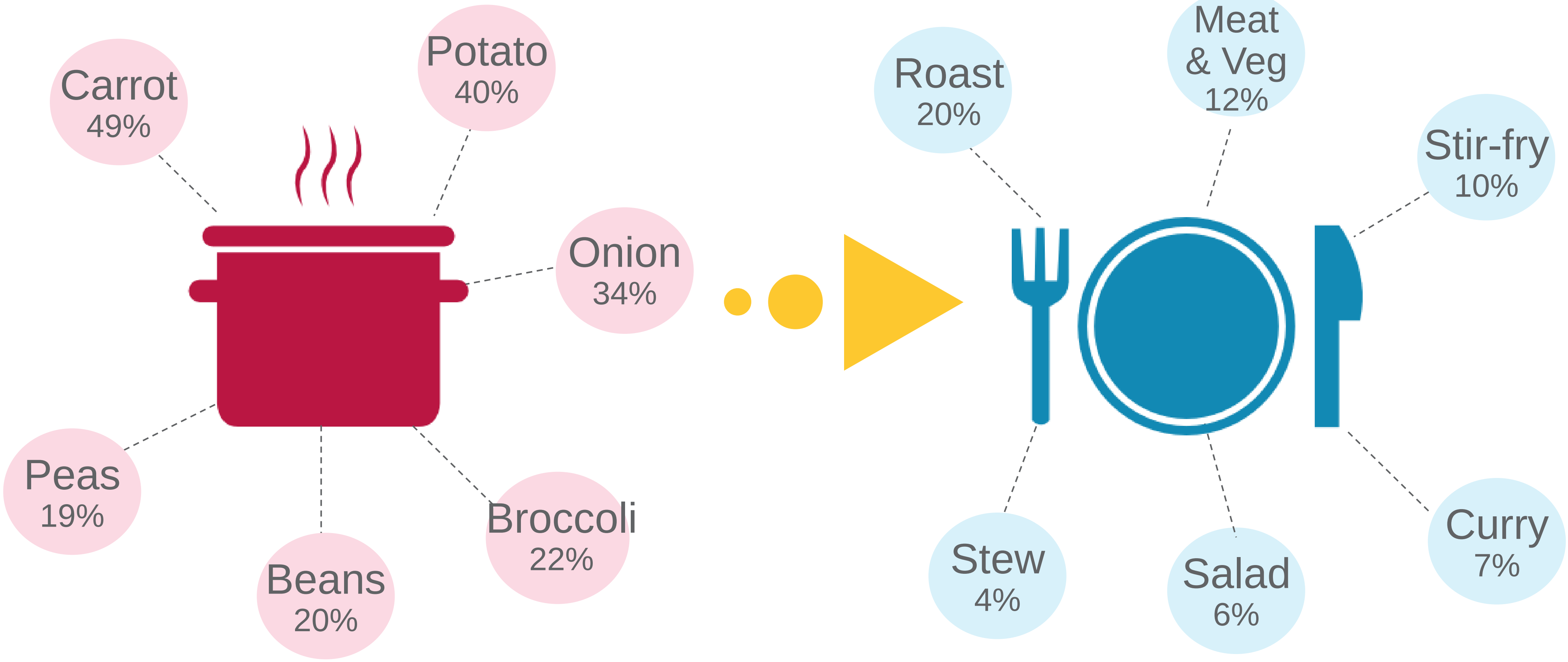


Q24 When you are in-store purchasing fresh vegetables, what is most important to you?

Cooking for friends and family conjures warm, hearty meals such as roasts and meat and vegetables.

Vegetables Used

Meals Cooked



Carrot 49%

Potato 40%

Onion 34%

Broccoli 22%

Beans 20%

Peas 19%

Roast 20%

Meat & Veg 12%

Stir-fry 10%

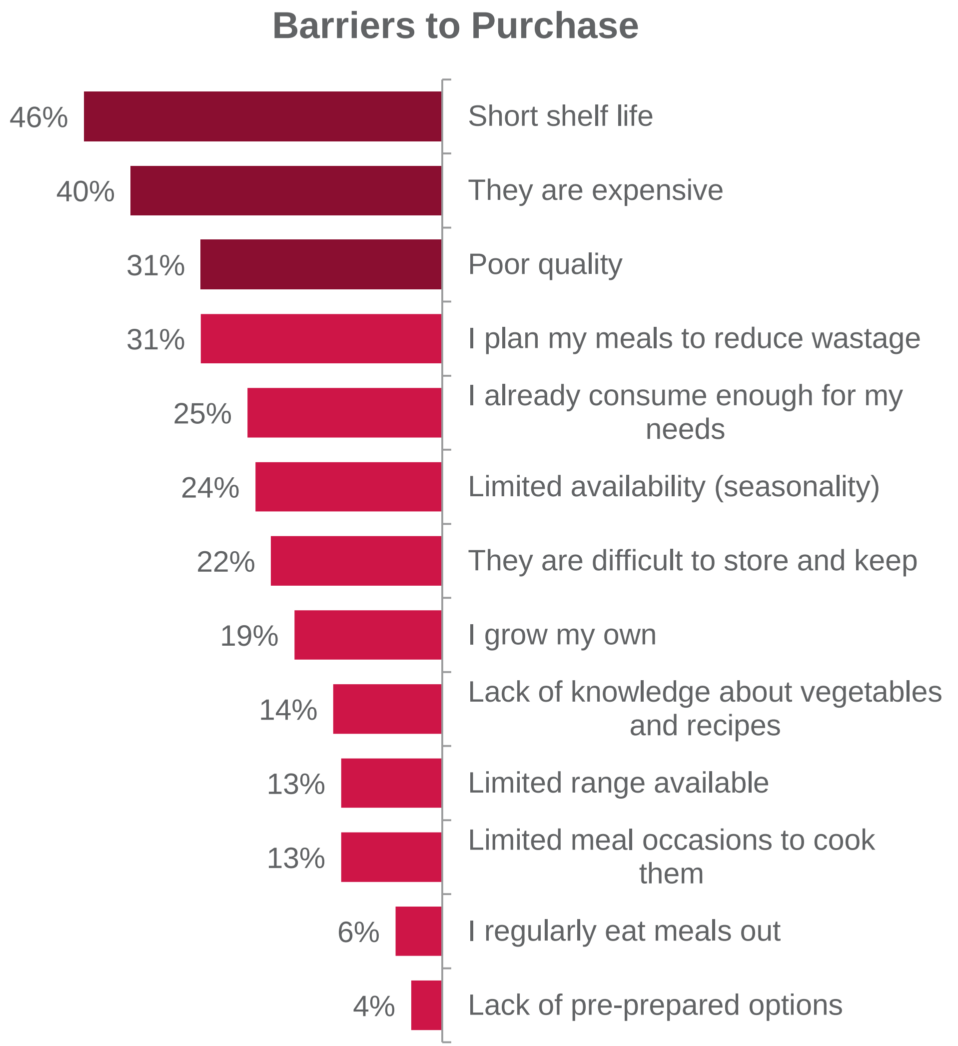
Curry 7%

Salad 6%

Stew 4%

Q14. For this next question, we'd like you to use your imagination! Imagine a friend is coming over for dinner, what meal with vegetables would you cook for them?
Tell us your favourite signature meal!

Promote flavour and health benefits to encourage purchase. Investigate extending shelf life, as this is the key barrier to purchase



Q15 If you think about the vegetables that you usually buy, what other reasons (beyond being healthy) do you choose the ones you do?
Q16 What reasons listed below describe why you don't purchase MORE fresh vegetables when you shop?