



**KANTAR**

# Hort Innovation

Introducing the Domestic  
Growth Framework

Australian Market Report  
October 2022

**Hort**  
**Innovation**

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# Key Insights

# 1

## 6 Needs Pillars Drive All Consumption Choices

All consumption of fresh produce is driven by 6 unchanging consumer needs:

1. Taste
2. Quick & Easy
3. Healthy & Nutritious
4. Indulgence
5. Physical & Mental Energy
6. Connection

# 2

## Taste and Convenience Are Table-stakes

While **Taste** and **Quick & Easy** are an **expectation** for all consumption territories, growth opportunities exist for many commodities by distinctively delivering to **'Second Order'** Needs

# 3

## Meal Occasion has the next Biggest Influence on Choice

While the 6 Needs Pillars are the primary driver of commodity choice, the next most predictive factor that determines consumers' choice for fresh produce is Meal Occasion:

1. Breakfast
2. Lunch
3. Dinner
4. Dessert
5. Snack

# 4

## Advantages can Drive Growth in 'Heartland' Territories

**Highlighting** where commodities have a **advantages in key territories can be leveraged to improve distinctivity and drive consumer choice**

# 5

## Poor Quality is the Biggest Barrier to Growth

Consumers cite **poor quality** as the most significant **impediment to choosing** fresh produce, and overcoming specific quality barriers is a necessity for most commodities to realise incremental growth opportunities



## 2. Background and Objectives

# Background

- To support and guide an approach to the delivery of industry-leading consumer insights, Hort Innovation developed a Consumer Insights Strategy 2022-2026 in late 2020.
- The Strategy identified three pillars of activity with the overall vision **“By 2026, consumer understanding is at the heart of our thinking and actions.”**
- Our research proposal is aligned with the second strategic pillar: bringing consumers into focus and will be delivered through MT21003 Consumer Demand Spaces for Horticulture project outcomes.



# Objectives

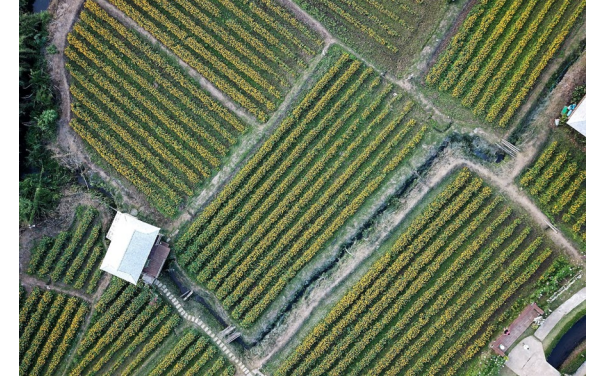
- The objective of this project is to help Hort Innovation provide a foundational demand spaces framework for the horticulture sector.
- This framework will support levy players, industry stakeholders and value chain members in identifying “**where to play**” and “**how to win**” when seeking to engage consumers.
- The demand space foundational framework will support the identification and prioritisation of growth opportunities which will uncover tangible avenues for industry stakeholders and Hort Innovation to drive ongoing campaign and product development strategies to **elevate demand for each category.**





# 3. Approach and Methodology

# Approach



## 1. Audit & Discovery

Project Kick Off  
Knowledge Audit  
Stakeholder Workshop

Outcomes from Phase 1:

- Clear understanding of key hypotheses and inputs into later stages of work and alignment on the knowledge gaps.

## 2. Localise & Enrich

Qualitative Online Community

Outcomes from Phase 2:

- In-depth market understanding of occasion-based needs, identifying drivers, barriers, gaps and unmet needs across the Australian market for fresh produce.
- Key inputs into the quantitative phase.

## 3. Develop Growth Plan

Quantitative Demand Space Modelling  
Quantitative Emotive Reasoning (NeedScope<sup>1</sup>)

Outcomes from Phase 3:

- Demand Space Model that maps all commodities, identifying 'Where-to-Play' and 'How-to Win'.
- NeedScope<sup>1</sup> framework that outlines the optimal emotive positioning for each commodity.

## 4. Align & Embed

Assimilation and Debrief Workshops:

- Debrief
- Where-to-Play and How-to-Win

Outcomes from Phase 4:

- Aligned Team trained, engaged and ready to activate clear missions & jobs to be done against prioritized horizons.
- A unified growth narrative tailored and fit for purpose for key stakeholder groups.



# Research Methodology

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## Qualitative

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- Online qualitative community
- Australia-wide with a cross-section of the general population
- N=40 consumers
- 5 x day moderated
- Members spent approximately 4-5 hours contributing daily to individual and group discussions, reacting to stimulus and building detailed response feedback
- Totalling **over 1,000 hours** of responses from community members

## Quantitative

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### Demand Space Model

- **N= 4,000, Australia wide, national representative sample**
- **25 minute survey**
- **Category usage across fruit, veg and nuts**
- **Category usage across fruit, veg and nuts**
- **Primary or shared grocery buyer for household**
- **Asked about their own most recent consumption of two of the 31 commodities that they consume frequently**



# 4. Context Impacting Consumer Choices

It is the **purchasing moments** that play the **biggest role** in fresh produce selection, rather than consumption moments.

Two key shifts in people's approach to food have impacted the role of fresh produce: **role of regionality and role of meals.**

# Shift 1: The role of regionality: from Australian to local

## From: Proudly purchasing Australian produce



- Supporting Aussie farmers has long been a driver of purchasing, along with Australian produce being seen to be of better quality
- Australian produce provides reassurance of quality controls, better growing conditions and health of food overall

## To: Proudly purchasing Local produce



- Supporting local farmers and areas, contributing to local communities and states. This is particularly prevalent in WA (Buy West, Eat Best campaign performing well).
- Moving more towards areas of regionality where certain produce shines (similar to wine) e.g. Riverina Apples

## Shift 2: The changing role of meals: Breakfast and Dinner play a bigger role

### From: Lunch punctuating the day



- Something that involved effort, either through planning and preparing something prior to leaving home or purchasing at work
- Provided people an opportunity to break up their day by stepping away from the workplace, particularly if going out to buy lunch
- Breakfast was often quick and on the go, dinner something low effort so lunch was more of a treat

### To: Breakfast and Dinner being the heroes



- Movement to working from home means people grab and go from whatever's in the fridge, rarely is lunch purchased
- Breakfast and dinner play a bigger role, more care and consideration goes into preparation as there is more time at the bookends of the work day

**Early imprints of produce** also play a critical role in how consumers approach fruits, vegetables and nuts.

## Childhood experiences and early imprints of food impact individual repertoire and engagement with fresh produce

What people were exposed to when they were young, in particular what fresh produce was used (and how) largely sets people up for how they use it as they get older.

People who've become more engaged with food and/or cooking tend to be the exception. They've made an effort to broaden their horizons, inspired by recipes or other experiences.



*“ This is food I grew up with, so have eaten it all my life. I suppose that’s why I eat more of these than of other vegetables. They’re my staples for roasts and just yummy.”*

Male, S/DINK





“I have vegetables that I buy and eat every week. They work well in most recipes and meals that I make, and there’s some that are interchangeable, like sweet potato instead of potato so I know things will always turn out alright.”

Female, S/DINK

Source: Kantar HIA Domestic Growth Study 2022

## When selecting what to eat, people are limited by what’s available to them, rarely do they seek out something specific

Few people are set on a particular piece of produce when they have a consumption moment, rather they choose what works for the moment that they’re in based on what’s readily available.

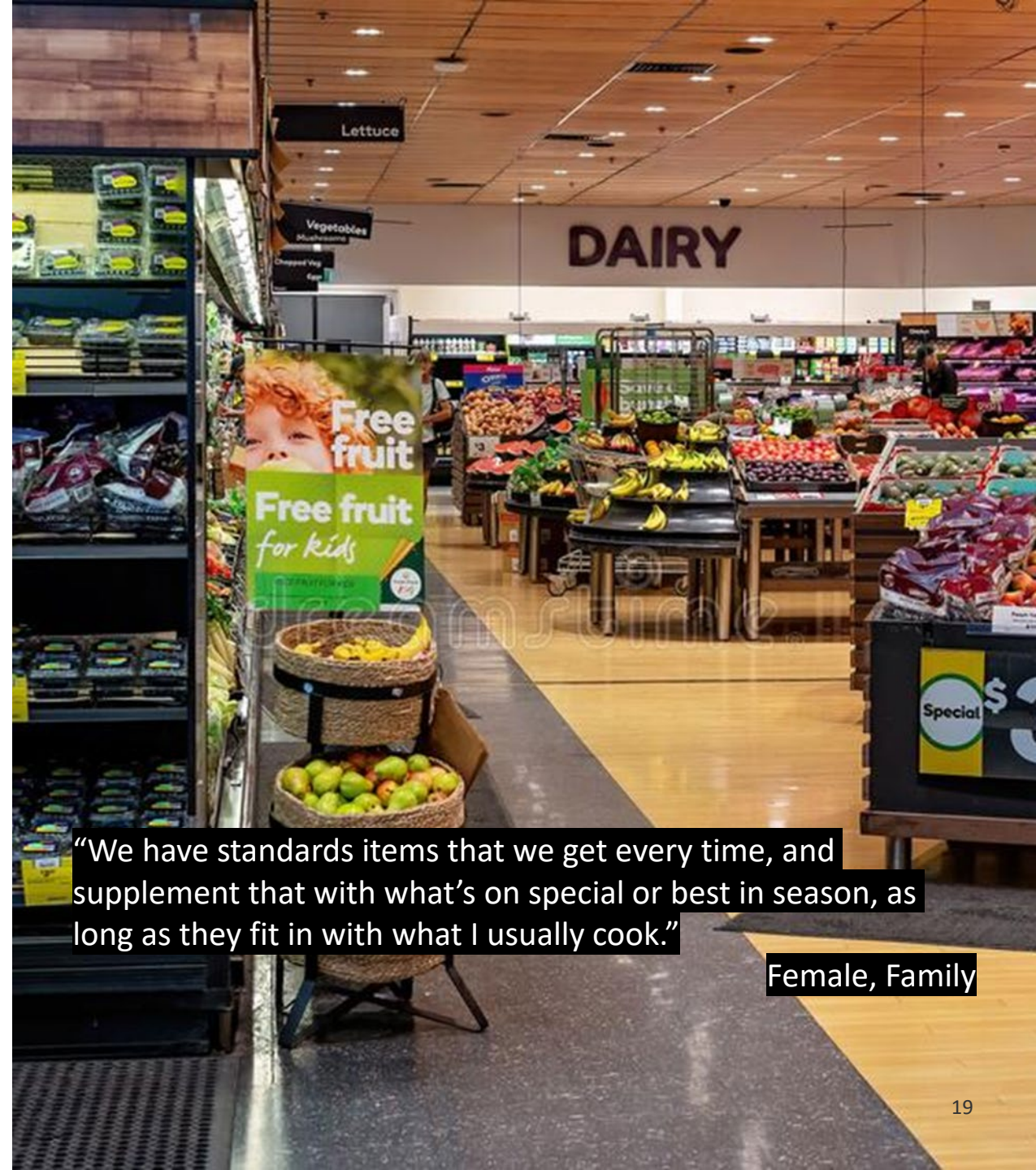
Ultimately, while the choice in the moment of consumption is important, the bigger decision comes in the purchase moment.

People tend to shop based on the type of meals they expect to have, with a healthy dose of flexibility.

## While people may not know exactly what they're going to purchase, they broadly know the types of produce they need or intend to buy.

Most people are habitual in both their consumption and shopping choices, and therefore have a set repertoire based upon the type of meals they're going to have over the community days/week.

This allows them to then make a choice for the best value at the time.

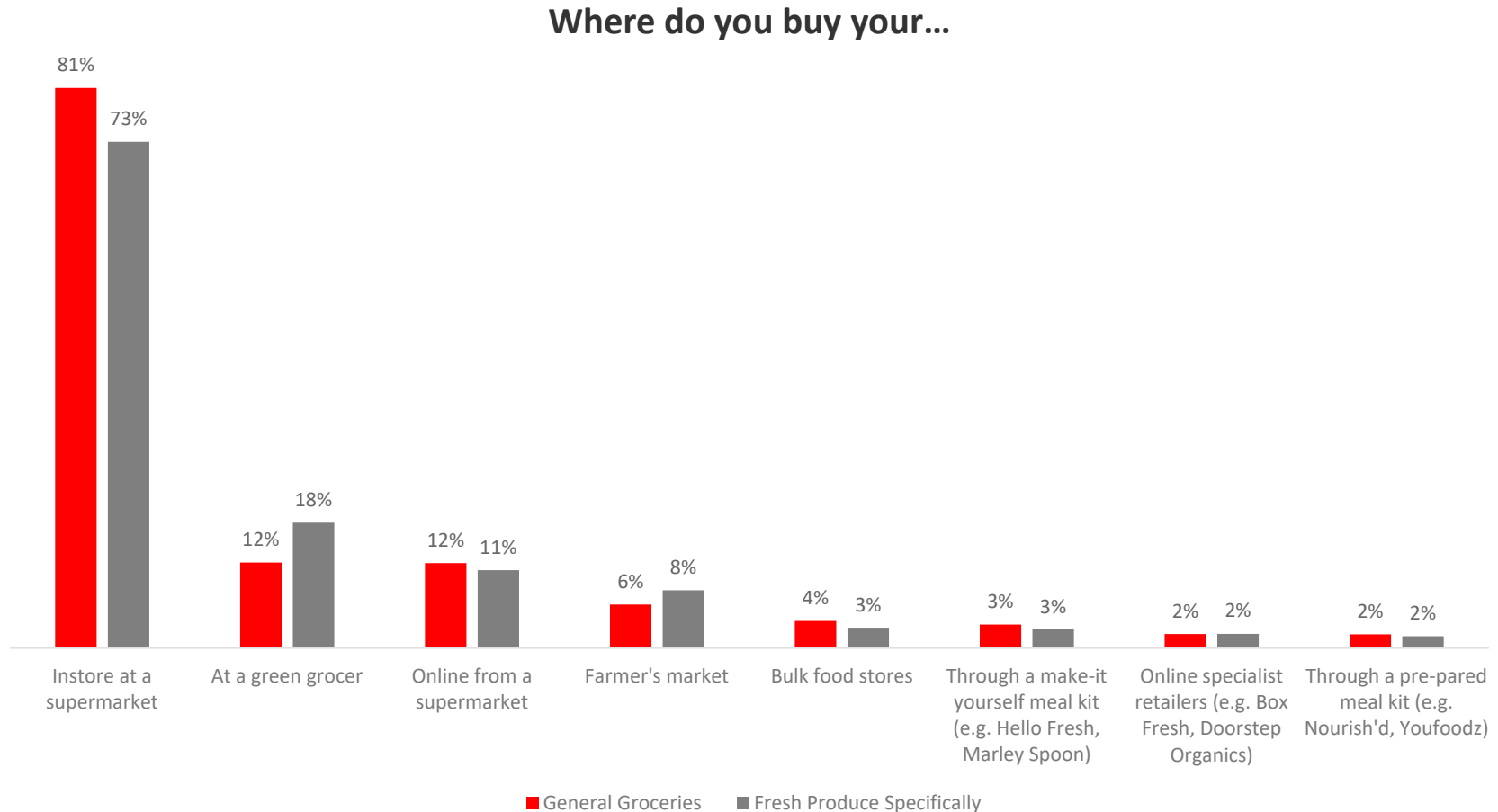


"We have standards items that we get every time, and supplement that with what's on special or best in season, as long as they fit in with what I usually cook."

Female, Family

# Groceries are overwhelmingly purchased in store at a supermarket

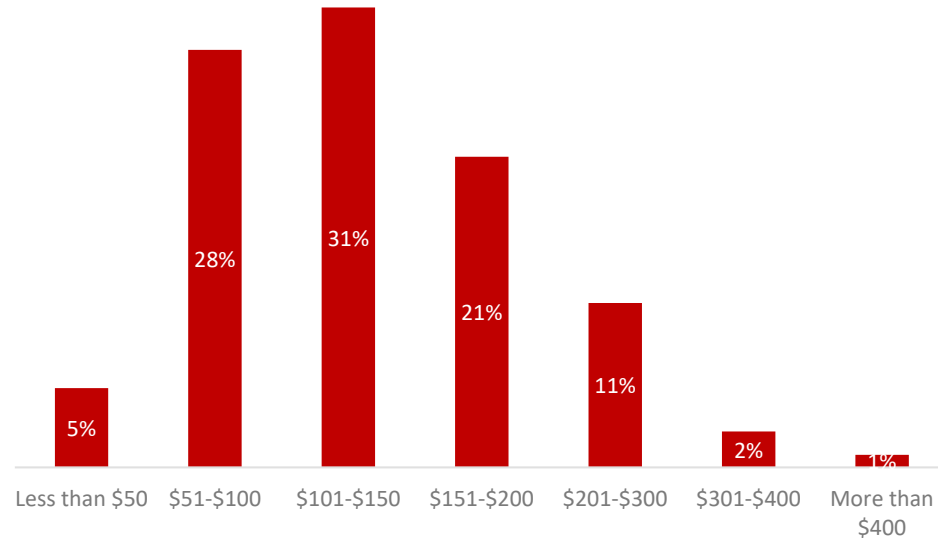
Nearly 1 in 5 consumers get fresh produce from a green grocer



# Over half of consumers are spending between \$100-\$200 a week on groceries

Consumers estimate that about 35% of their weekly grocery bill is spent on produce

In a typical week, how much do you spend on groceries?



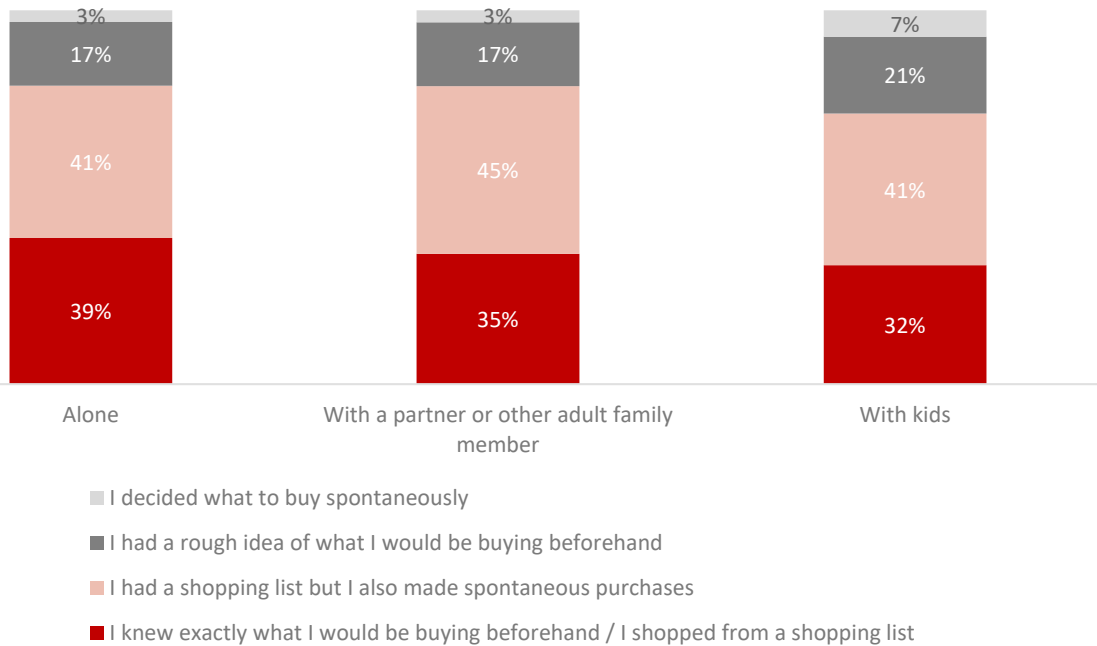
# 35%

Estimated share of grocery cost spent on fresh produce specifically in a typical week

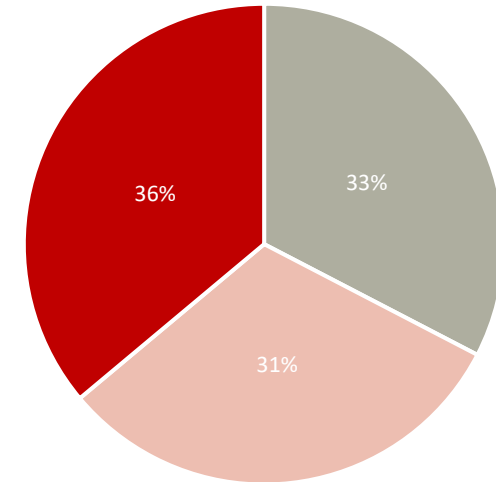
# Consumers like to use a list, although they are open to spontaneous purchases

Attitudes towards new and different items differ across the consumer base

Which would you say describes your shop when shopping...



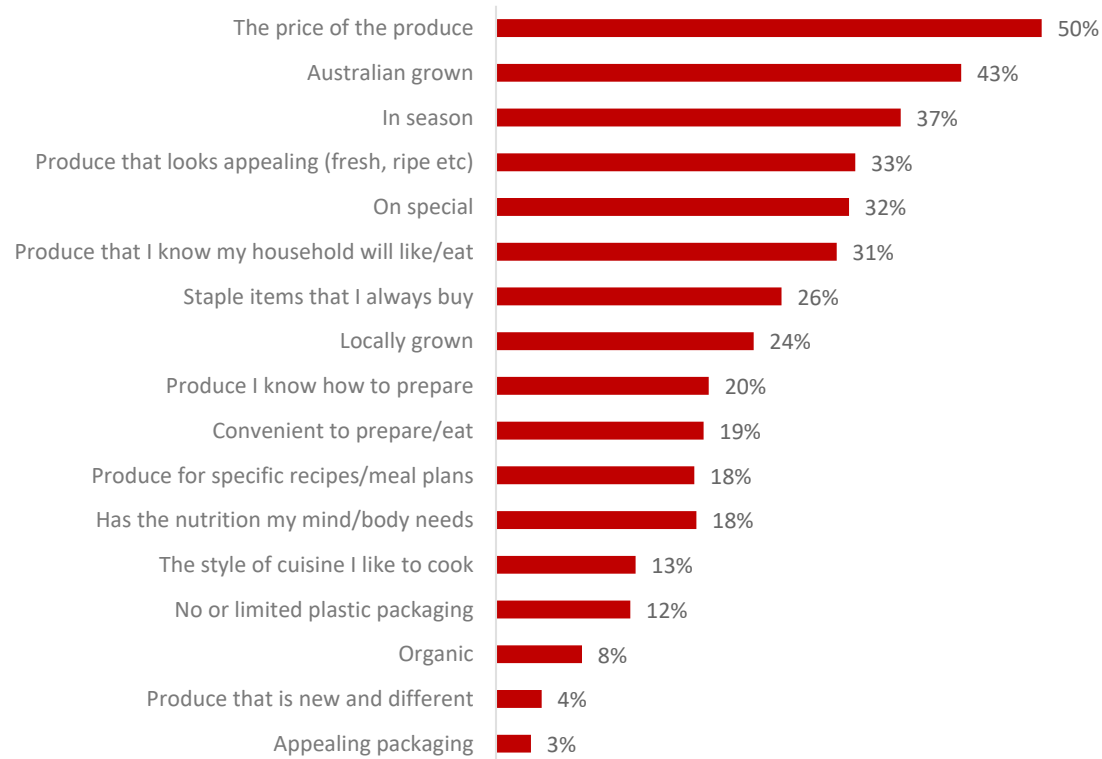
When shopping for fresh produce do you...



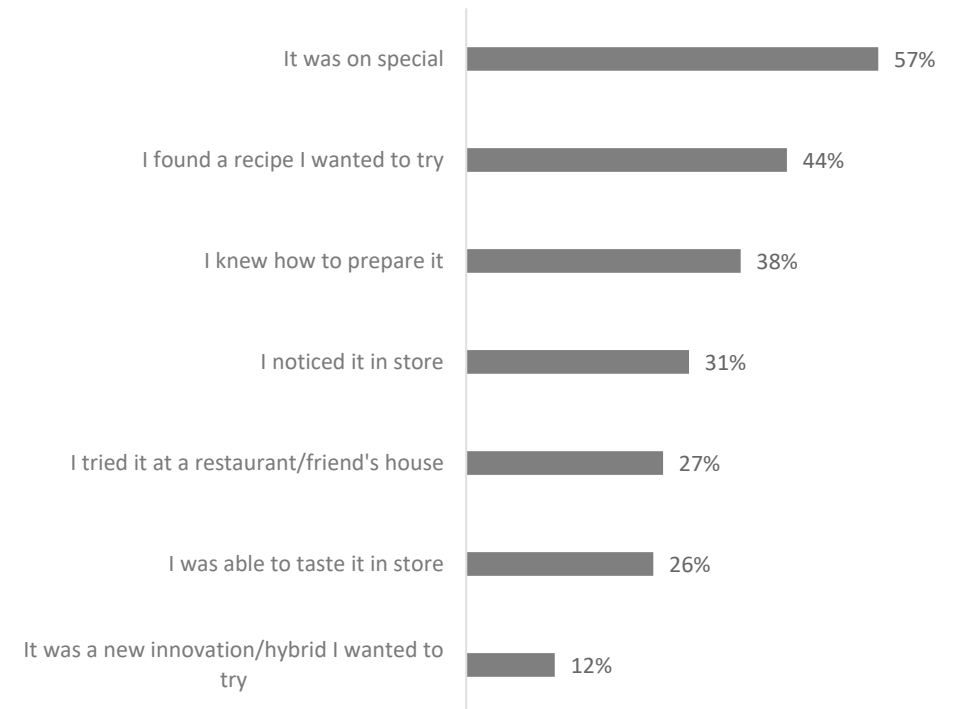
# Price aside, the biggest purchase drivers are Australian grown and in season

Consumers are hesitant to try new items without a recipe or knowledge of how to prepare it

## When shopping for fresh produce what determines your choice?

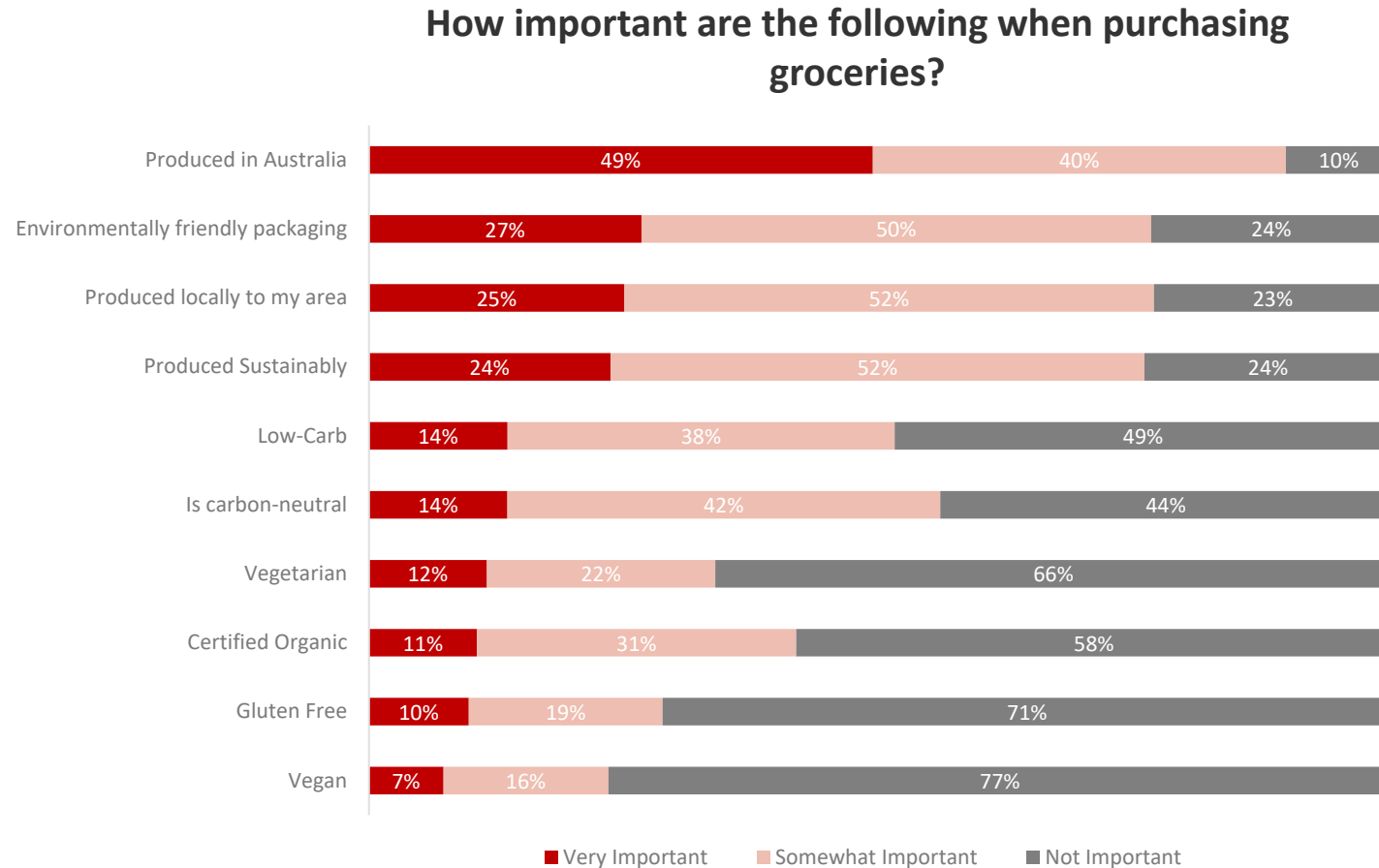


## What would encourage you to purchase fresh produce you wouldn't normally buy?



# Locality and sustainability are what consumers are looking for from groceries

Dietary claims like Vegan and Gluten-free are less important to most consumers







# 5. Introducing the Demand Space Framework

# What can the Demand Space framework do?

Represent a total Australian market map of commodity consumption that shows where commodities are strong today, and could grow in the future.

## *Additionally:*

### **Diagnostics**

Understanding the consumption landscape of fresh produce, quantifying demand, and where some commodities have advantages over others.

Understanding drivers and barriers within key consumption territories.

### **Competitive Mapping**

Identify the distinct consumption territories that certain commodities can deliver against.

Map the commodities' performance compared to substitutes, and their relative performance.

### **Opportunity Identification**

Defining '**Where to Play**' - Identifying which consumption territories will unlock growth for certain commodities.

### **Activation Guidelines**

Guiding stakeholders on '**How to Win**', and what consumers are looking for in key consumption territories. Identify best in class commodities to understand why and how they are winning.

# How did we build it?

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## Key Inputs

### What We Used...

- Commodity Consumption Frequency (Z6)
- Meal Occasion (C2)
- Occasion Needs (C8)



## Advanced Analysis

### What We Did...

- Principle Component Analysis
- Cluster Analysis
- Correspondence Mapping
- Qualitative Validation



## Key Outputs

### What We Got...

- 6 Needs Pillars
- 5 Meal Occasions



**Demand  
Space  
Framework**

# We have identified **6 needs pillars**, born of unchanging consumer needs that drive consumption choices of fresh produce



**Tasty**

*All about:* Taste, Refreshment, and Enjoyment



**Quick & Easy**

*All about:* Convenience, Simplicity, and Ease



**Healthy & Nutritious**

*All about:* Guilt-free, Nourishing and Sensible



**Indulgence**

*All about:* Comfort, Relaxation and Self Care



**Physical & Mental Energy**

*All about:* Energy, Uplift, and Reinvigoration

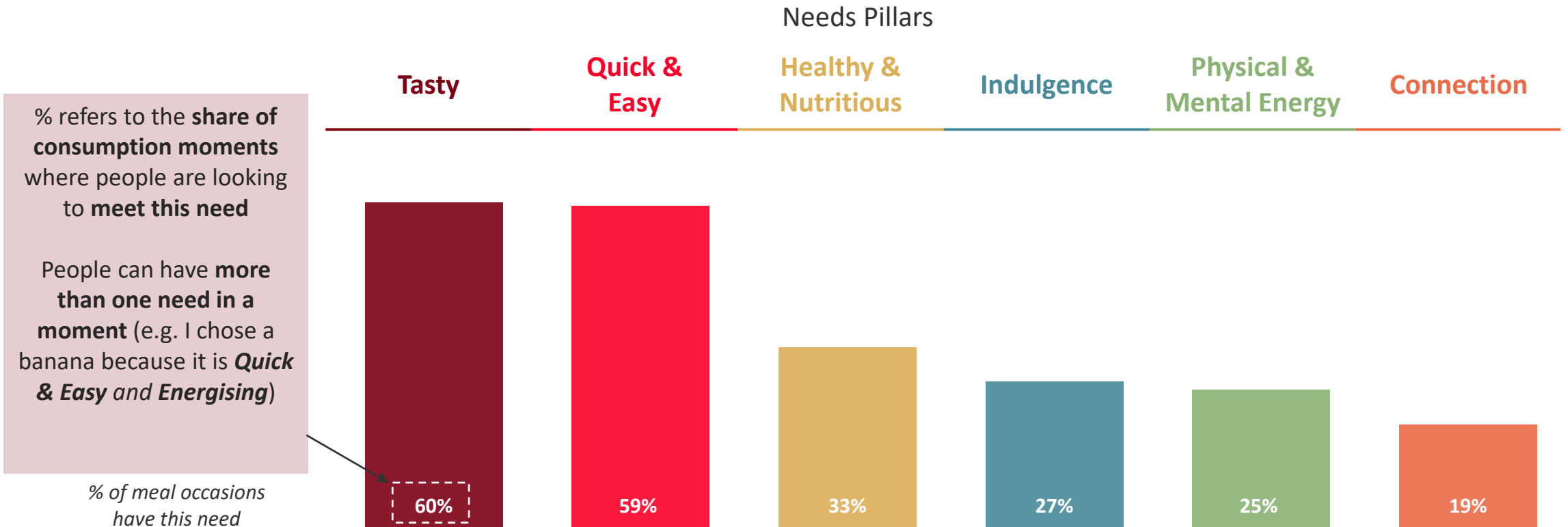


**Connection**

*All about:* Bonding, Celebration and Creating Memories

## Needs Pillars

# In over half of all fresh produce occasions consumers are in search of something **Tasty** and **Quick & Easy**



N=4,002

Question: How important were each of the following when you chose to consume *commodity name* at *occasion* time?

Additional detail in Appendix B

Source: Kantar HIA Domestic Growth Study 2022

# The **6 needs pillars** form the first of two dimensions that make up our Demand Space framework



**Tasty**

*All about:* Taste, Refreshment, and Enjoyment



**Quick & Easy**

*All about:* Convenience, Simplicity, and Ease



**Healthy & Nutritious**

*All about:* Guilt-free, Nourishing and Sensible



**Indulgence**

*All about:* Comfort, Relaxation and Self Care



**Physical & Mental Energy**

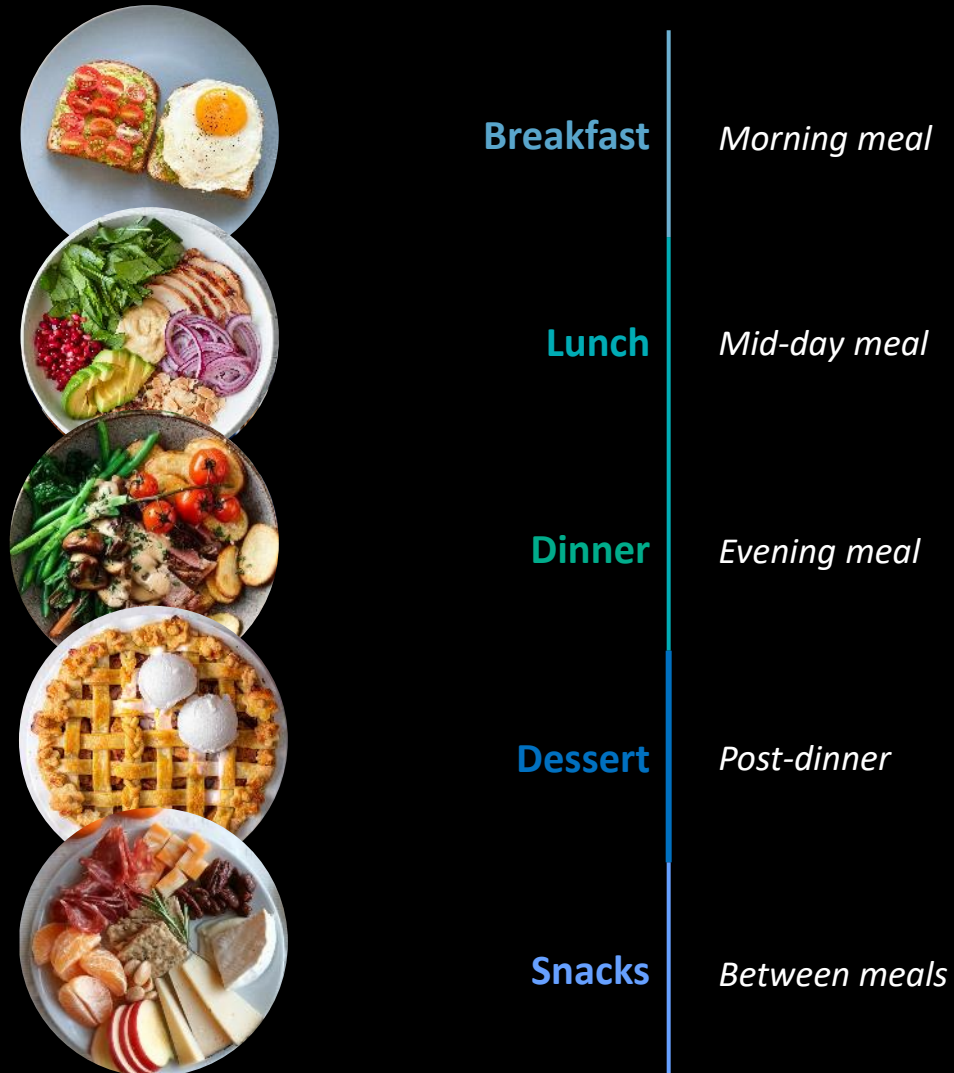
*All about:* Energy, Uplift, and Reinvigoration



**Connection**

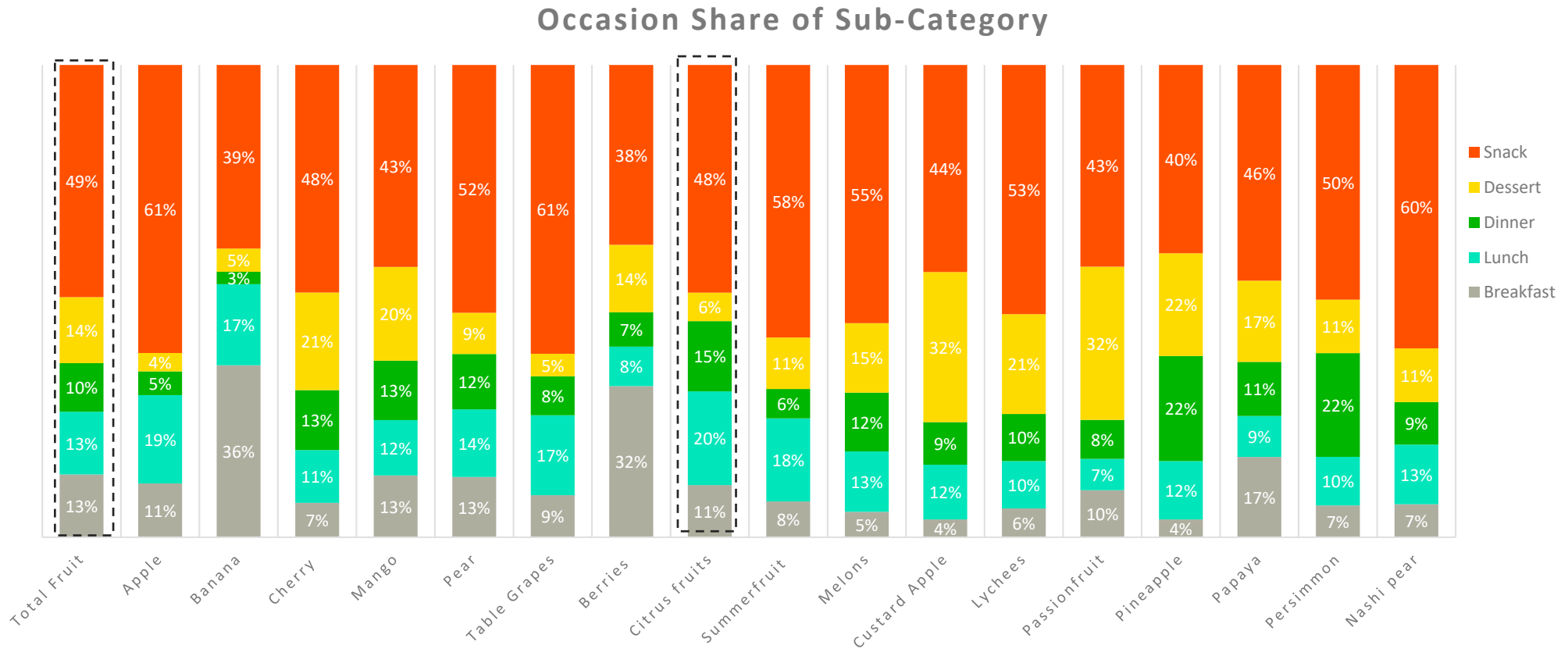
*All about:* Bonding, Celebration and Creating Memories

The meal occasion has the biggest influence on commodity choice, making it a natural second dimension of the Demand Space framework



# Fruit by consumption occasion

Snack Occasions are 48% of Citrus occasions, which is on par with 49% for All Fruit. Lunch is 20% of all Citrus occasions, an over-representation vs 13% for All Fruit.



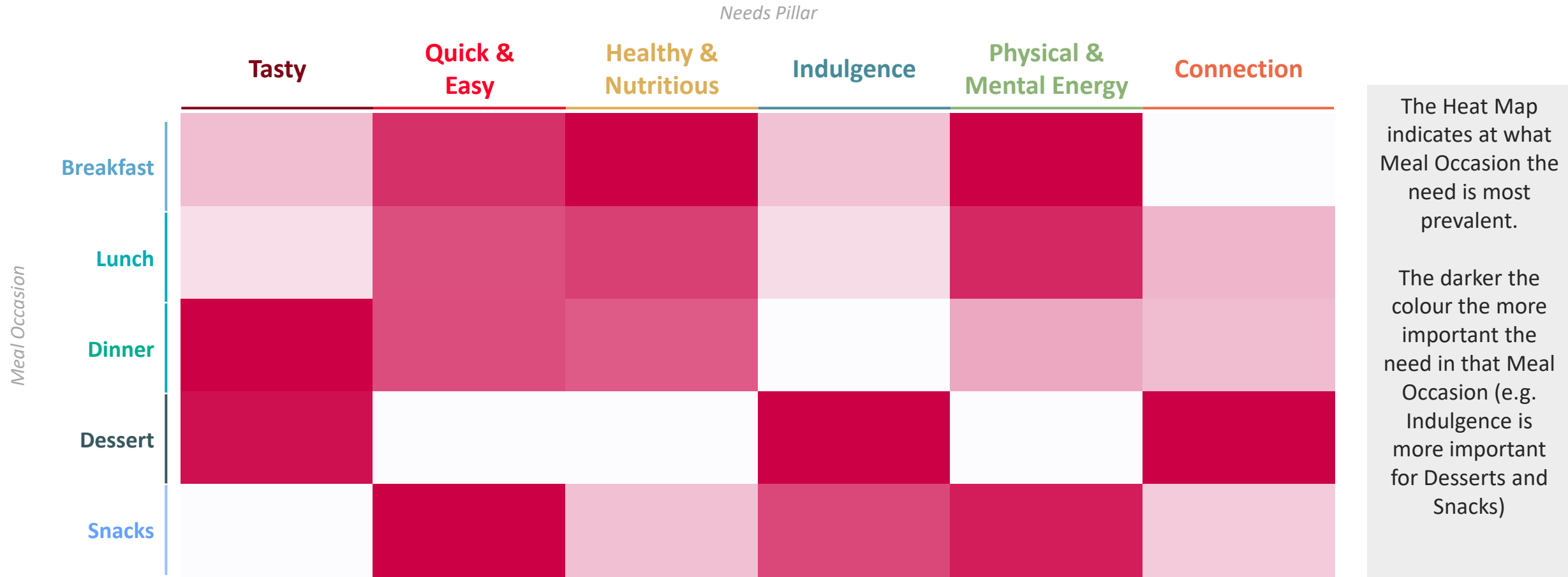


# Demand Space Framework

*Needs Pillar*

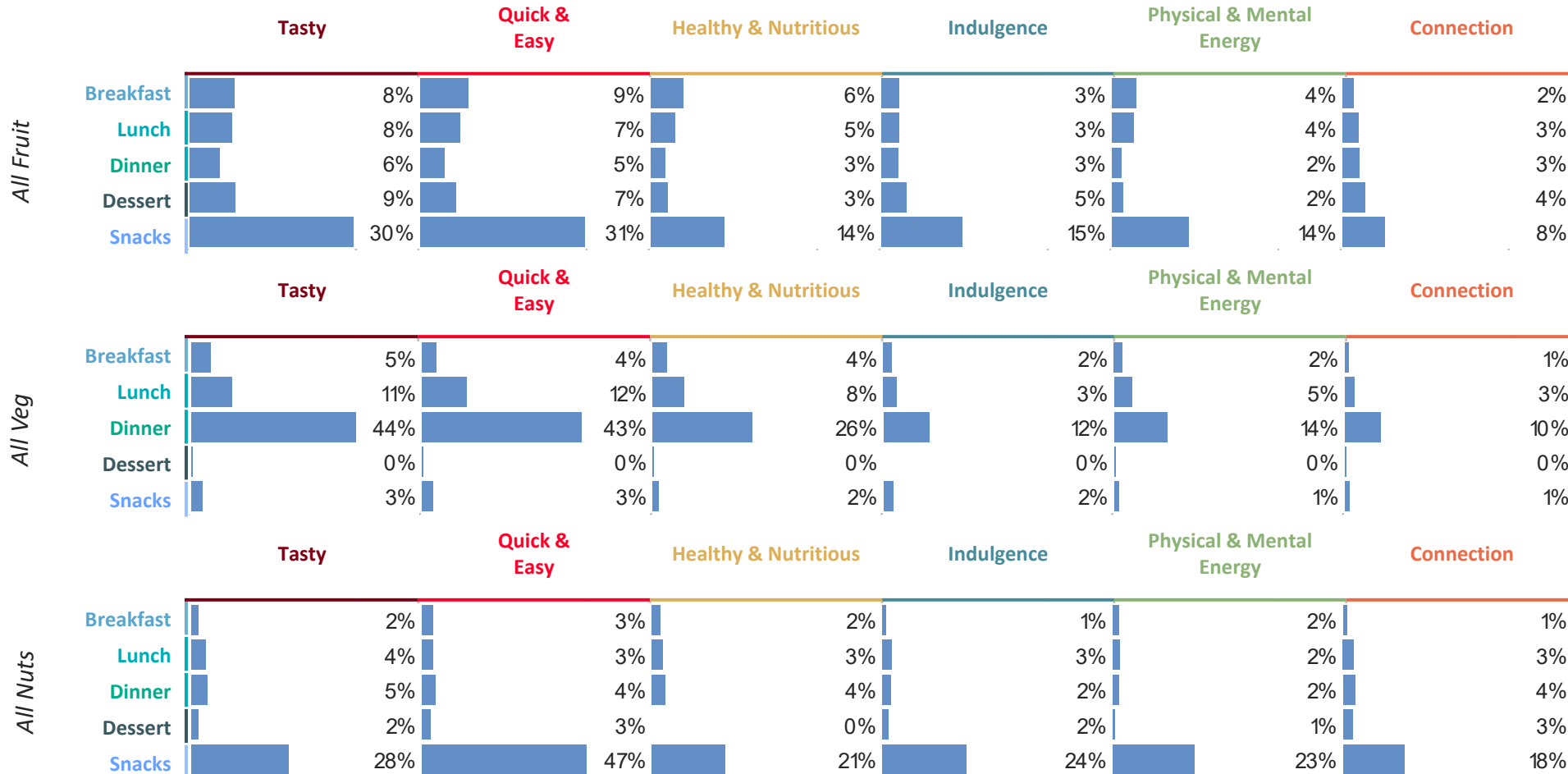
|           | Tasty | Quick & Easy | Healthy & Nutritious | Indulgence | Physical & Mental Energy | Connection |
|-----------|-------|--------------|----------------------|------------|--------------------------|------------|
| Breakfast |       |              |                      |            |                          |            |
| Lunch     |       |              |                      |            |                          |            |
| Dinner    |       |              |                      |            |                          |            |
| Dessert   |       |              |                      |            |                          |            |
| Snacks    |       |              |                      |            |                          |            |

# The Needs Pillars vary in importance across Meal Occasions



# Demand Space Framework

The Demand Space framework provides a map of the landscape through which we can understand the role commodities plays now and into the future



Fruits today are showing up strongly in the Snacking space, particularly meeting the needs of Tasty and Quick & Easy



Veg today plays primarily in the Dinner space meeting the primary needs of taste and convenience while being Healthy & Nutritious



Nuts play today firmly in the Snacking space and are Quick & Easy, Indulgent and Energising



## 6. Citrus Fruit Deep Dive

## Commodities In Scope

This study covers 31 commodities that can be mapped on the Demand Space framework to identify current and future opportunities



Apple



Almond



Avocado



Banana



Berries



Broccoli/ini



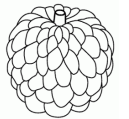
Cherry



Chestnut



Citrus



Custard  
Apple



Dried Fruit



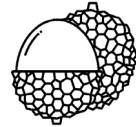
Fruiting  
Vegetables



Hard  
Vegetables



Leafy  
Vegetables



Lychees



Macadamia



Mango



Melon



Mushroom



Nashi



Olives



Onions



Papaya



Passionfruit



Pear



Persimmon



Pineapple



Potatoes



Summer  
Fruit



Sweet  
Potatoes

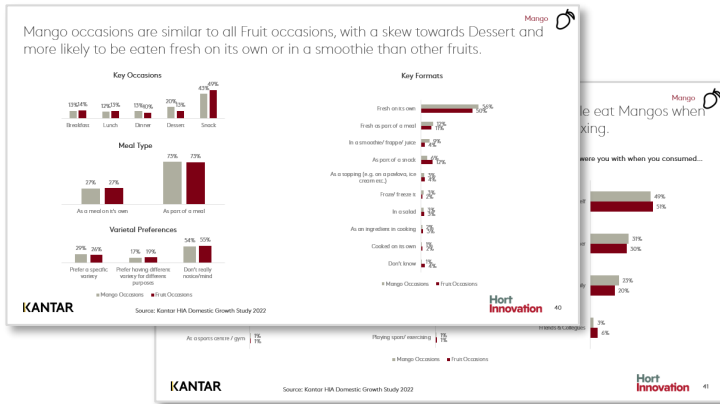


Table Grapes

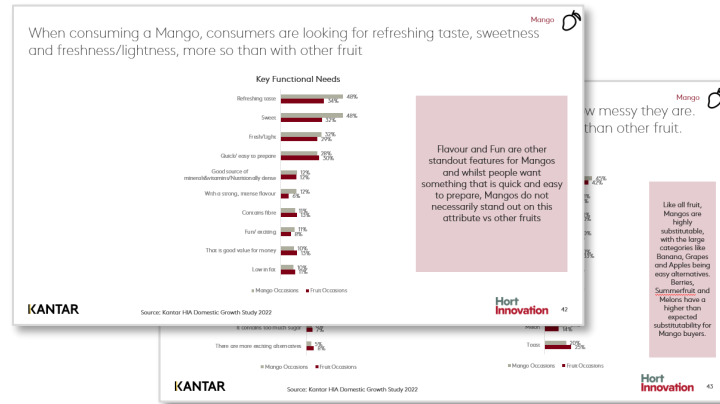
# Content for Each Commodity

## What's included for each commodity?

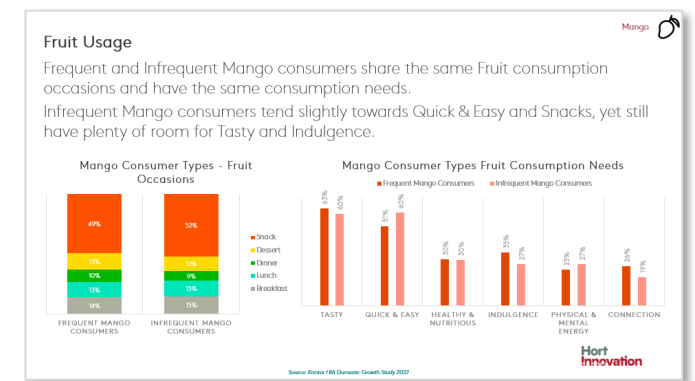
### Commodity Occasions



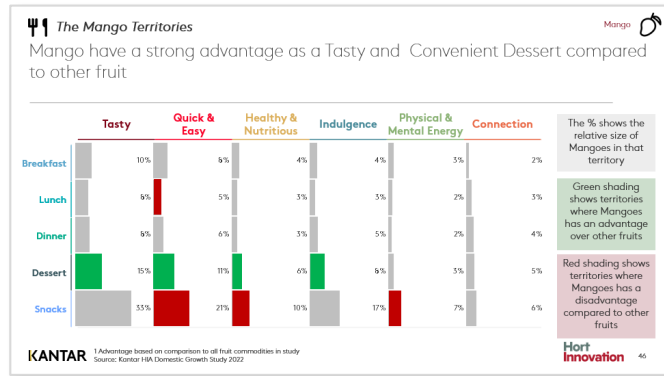
### Drivers/Barriers/Substitutes



### Light v Heavy Consumers

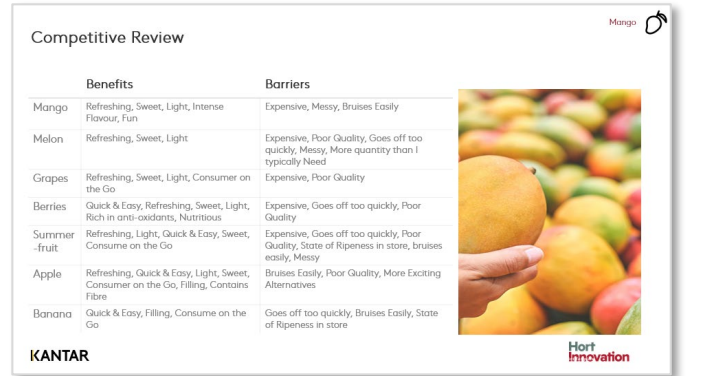
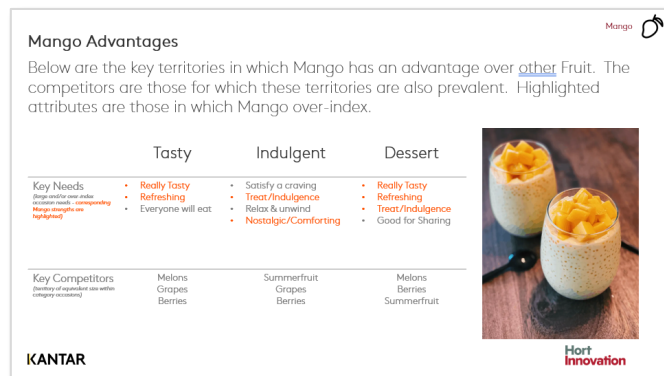


### Where to Play



### Territory Advantages/Disadvantages

### How to Win



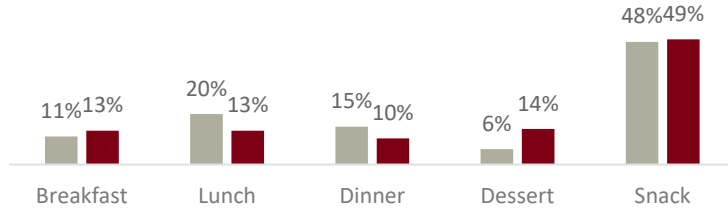
# Citrus Fruits

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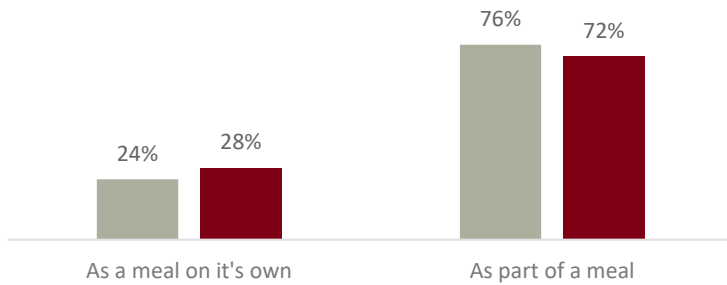


Citrus fruit occasions are similar to all Fruit occasions, with a skew towards Lunch & Snacks and more likely to be eaten fresh on their own or as an ingredient in cooking.

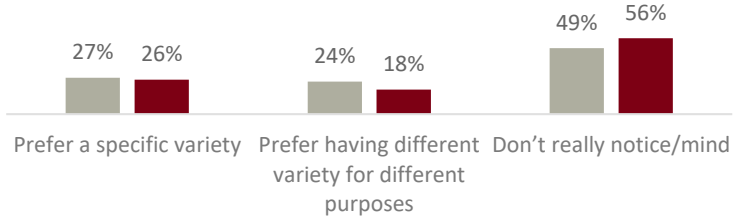
When did you consume...



Did you consume it...

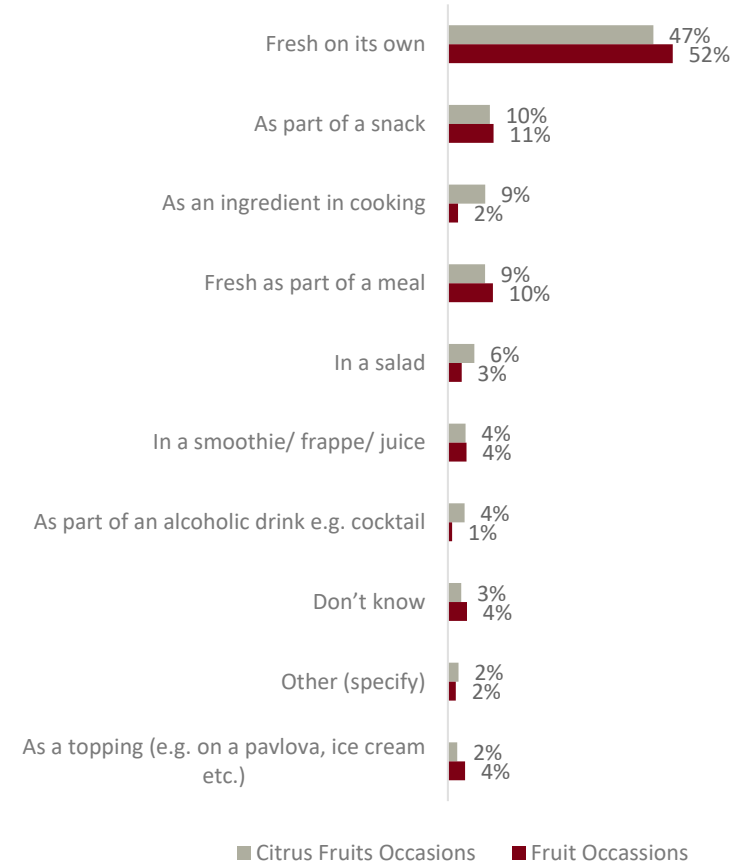


When you typically buy or eat citrus fruits do you prefer a specific variety?



■ Citrus Fruits Occasions ■ Fruit Occasions

How did you eat...

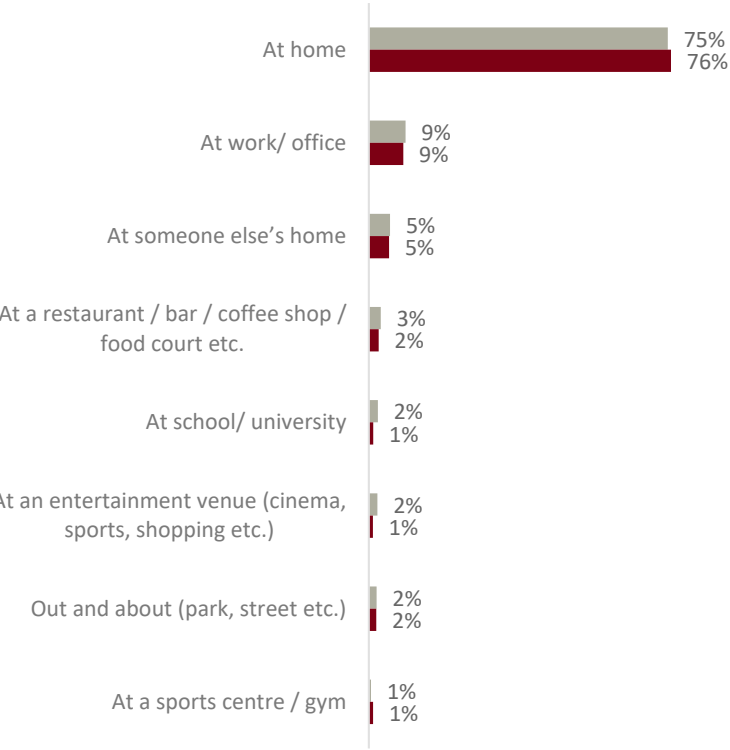


■ Citrus Fruits Occasions ■ Fruit Occasions

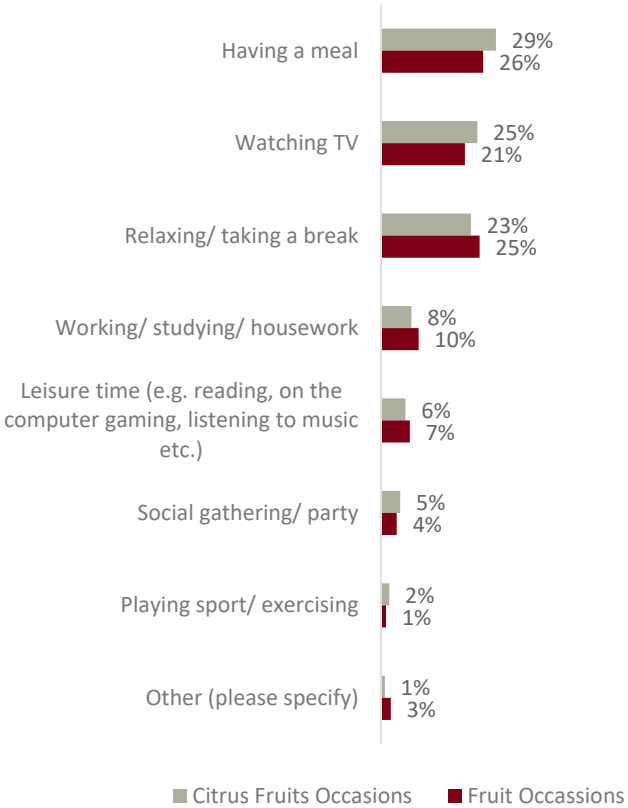


Similarly to all fruits, Citrus Fruits are mostly consumed at home. People eat Citrus Fruits when they're having a meal or during downtime like watching TV or relaxing.

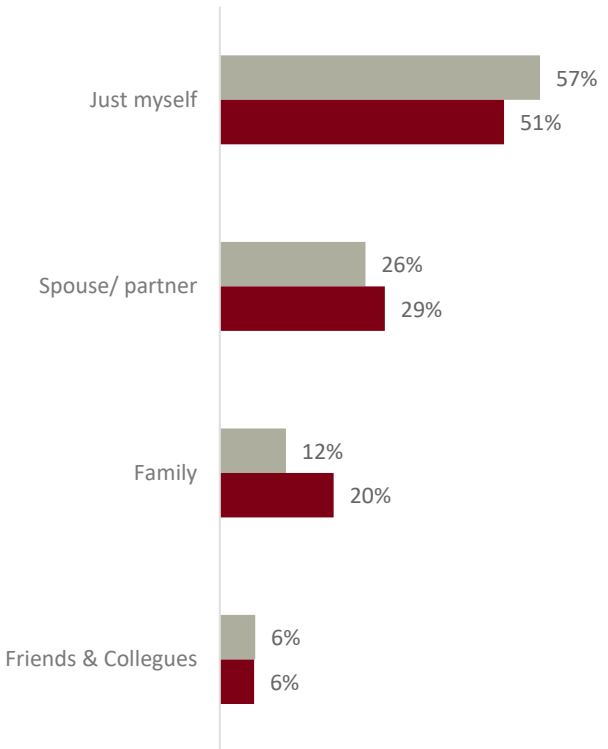
Where did you consume...



What were you doing when you consumed...

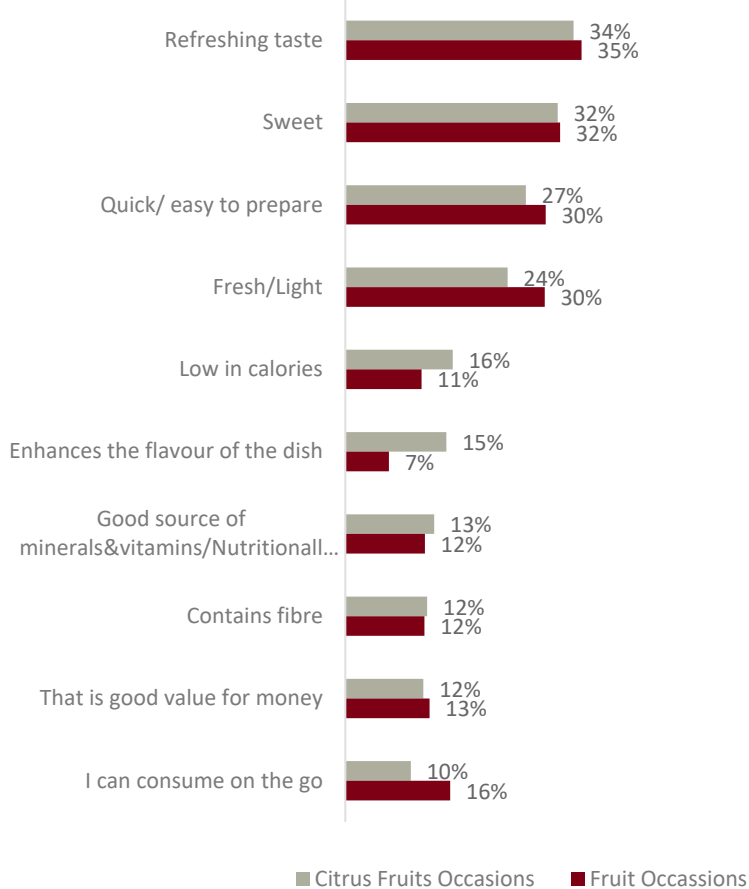


Who were you with when you consumed...



When consuming Citrus Fruits, people are looking for refreshing taste, sweetness and ease of preparation, similar with other fruit

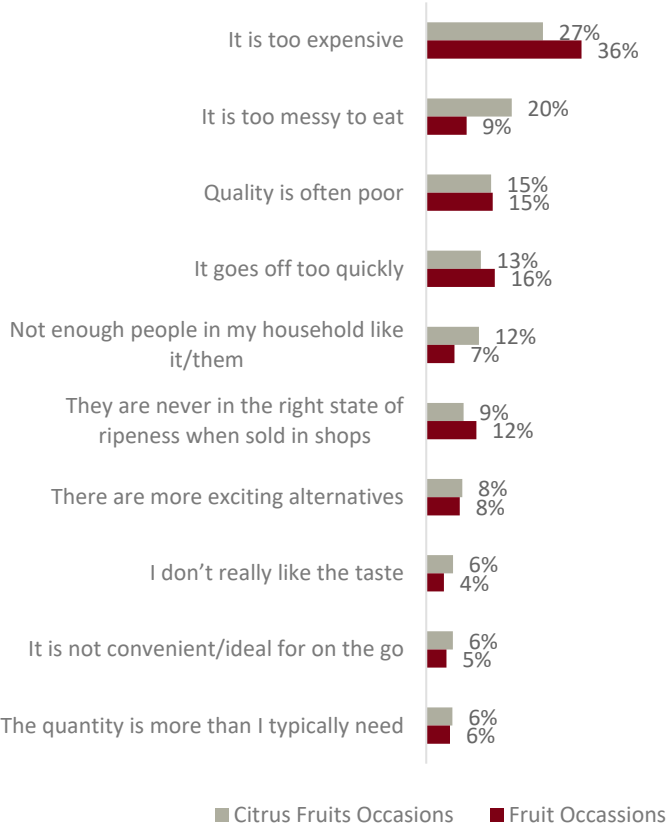
**Key Functional Needs**



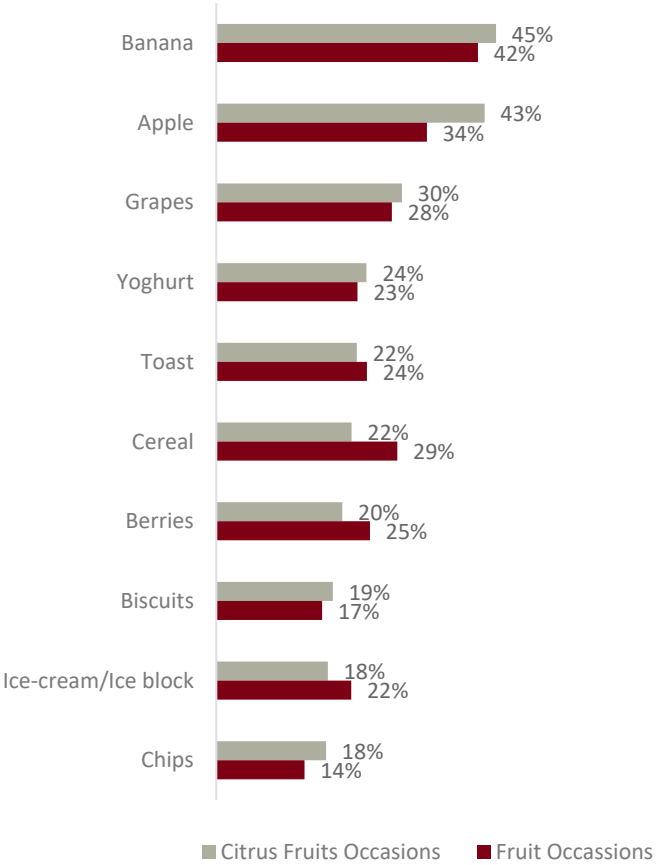
Enhancing the flavour of a dish and being low in calories are stand out features for Citrus Fruits and whilst people want something that is refreshing, sweet and quick & easy Citrus Fruits do not necessarily stand out on this attribute vs other fruits

The most significant barriers for Citrus Fruits are cost and how messy they are. They are also challenged by shelf life and quality, but less so than other fruits.

Key Barriers



Key Substitutes



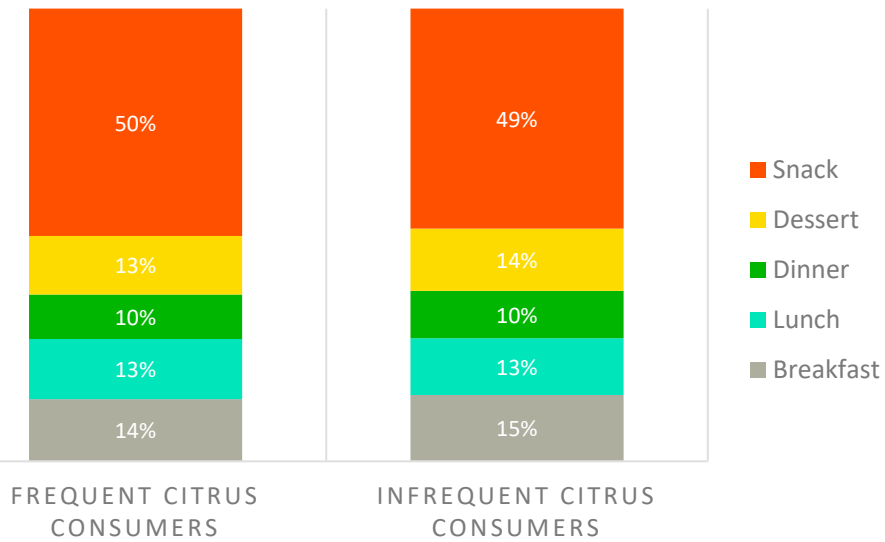
Like all fruit, Citrus are highly substitutable, with the large categories like Banana, Apples and Grapes being easy alternatives. Berries have a higher than expected substitutability for Citrus buyers.

# Citrus Usage

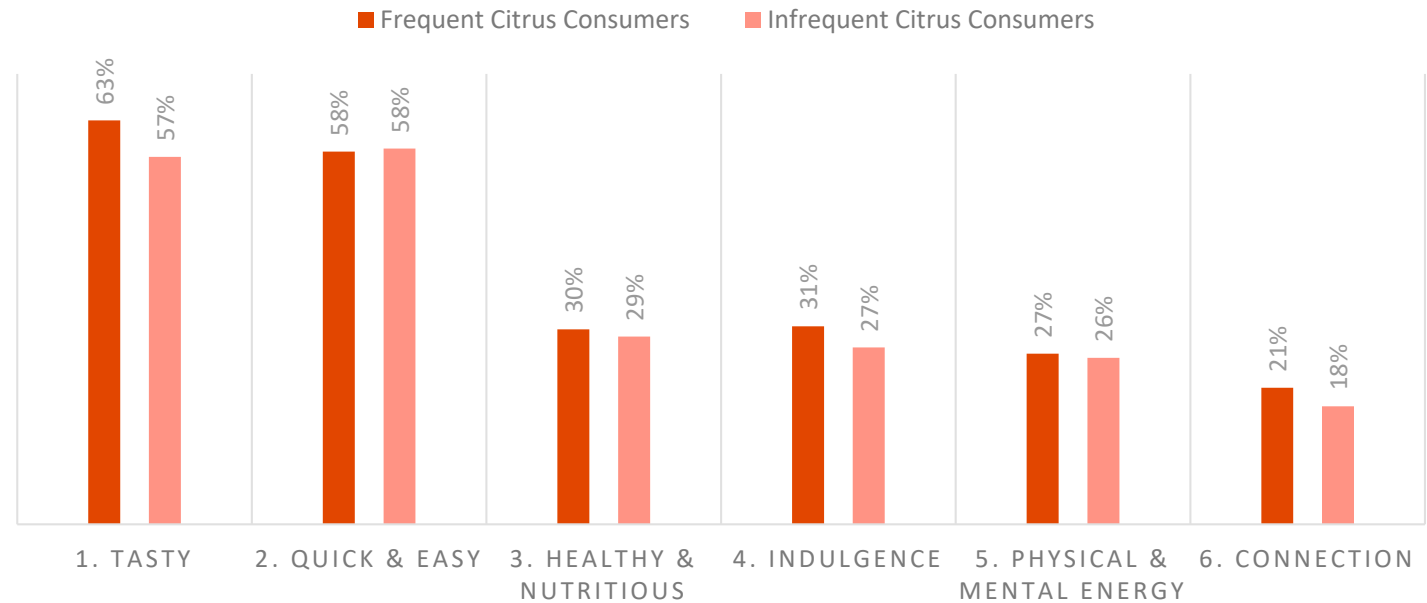
Frequent and Infrequent Citrus Fruit consumers share the same Fruit consumption occasions and have the same consumption needs.

Frequent Citrus Fruit consumers tend slightly towards Tasty and Indulgence needs

Citrus Fruit Consumer Types - Fruit Occasions



Citrus Fruit Consumer Types Fruit Consumption Needs



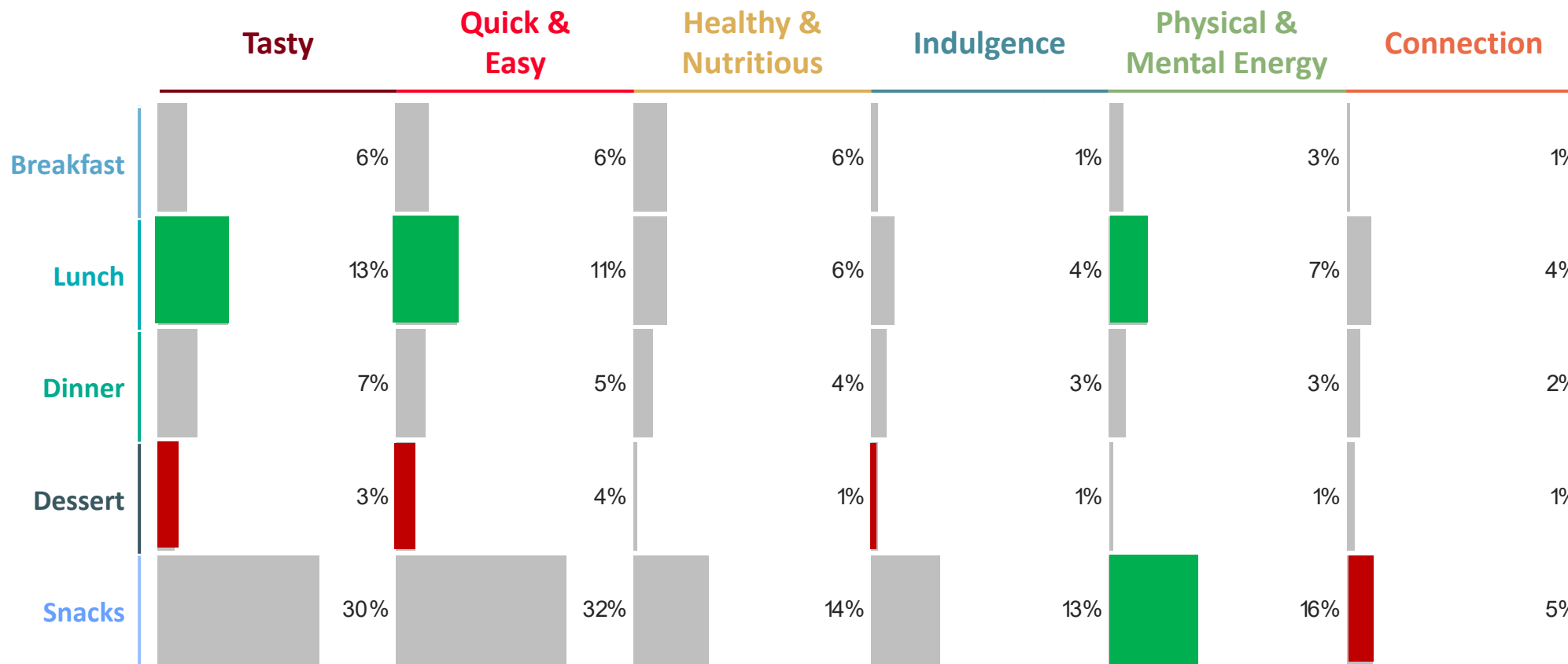
N= 3115 Frequent Citrus Fruit Consumers; N= 1686 Infrequent Citrus Fruit Consumers

Question: When did you consume *commodity*?; How important were each of the following when you chose to consume *commodity name* at *occasion* time?

Source: Kantar HIA Domestic Growth Study 2022



## Citrus Fruits have an advantage as Tasty and Quick & Easy options in the Lunch occasion & Energy Snacks



The % shows the relative size of Citrus Fruits in that territory

Green shading shows territories where Citrus Fruits have an advantage over other fruits

Red shading shows territories where Citrus Fruits have a disadvantage compared to other fruits

N= 195 Citrus Fruit occasions

1 Advantage based on comparison to all fruit commodities in study

Source: Kantar HIA Domestic Growth Study 2022

# Citrus Advantages

Below are the key territories in which Citrus has an advantage over other Fruit. Listed are the most important attributes for each. The competitors are those for which these territories are also prevalent.

|                                                                                           | Energy                                                                                                                                                                         | Quick & Easy                                                                                                                                              | Lunch                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Key Needs</b><br><i>(large and/or over-index occasion needs)</i>                       | <ul style="list-style-type: none"> <li>Stopped me feeling hungry</li> <li>Quick energy boost</li> <li>Long lasting energy</li> <li>Nutrition for my Mind &amp; Body</li> </ul> | <ul style="list-style-type: none"> <li>Quick &amp; Easy</li> <li>Requires little thought</li> <li>Already available</li> <li>Consume on the Go</li> </ul> | <ul style="list-style-type: none"> <li>Really Tasty</li> <li>Quick &amp; Easy</li> <li>Refreshing</li> <li>Nutrition for my Mind &amp; Body</li> <li>Already available</li> </ul> |
| <b>Key Competitors</b><br><i>(territory of equivalent size within category occasions)</i> | Banana<br>Apple<br>Grapes                                                                                                                                                      | Banana<br>Apple<br>Grapes<br>Pear<br>Summerfruit                                                                                                          | Banana<br>Apple<br>Grapes<br>Summerfruit                                                                                                                                          |



# Competitive Review

|              | Benefits                                                                                 | Barriers                                                                                         |
|--------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| Citrus       | Refreshing, Sweet, Quick & Easy, Light, Enhances the Flavour of the Dish, Aids Digestion | Messy, Not liked by the whole Household, Poor Quality                                            |
| Banana       | Quick & Easy, Filling, Consume on the Go                                                 | Goes off too quickly, Bruises Easily, State of Ripeness in store                                 |
| Apple        | Refreshing, Quick & Easy, Light, Sweet, Consume on the Go, Filling, Contains Fibre       | Bruises Easily, Poor Quality, More Exciting Alternatives                                         |
| Grapes       | Refreshing, Sweet, Light, Consume on the Go                                              | Expensive, Poor Quality                                                                          |
| Summer-fruit | Refreshing, Light, Quick & Easy, Sweet, Consume on the Go                                | Expensive, Goes off too quickly, Poor Quality, State of Ripeness in store, bruises easily, Messy |
| Pear         | Refreshing, Sweet, Consume on the Go, Contains Fibre                                     | Bruises Easily, Goes off too quickly, Messy, More Exciting Alternatives                          |



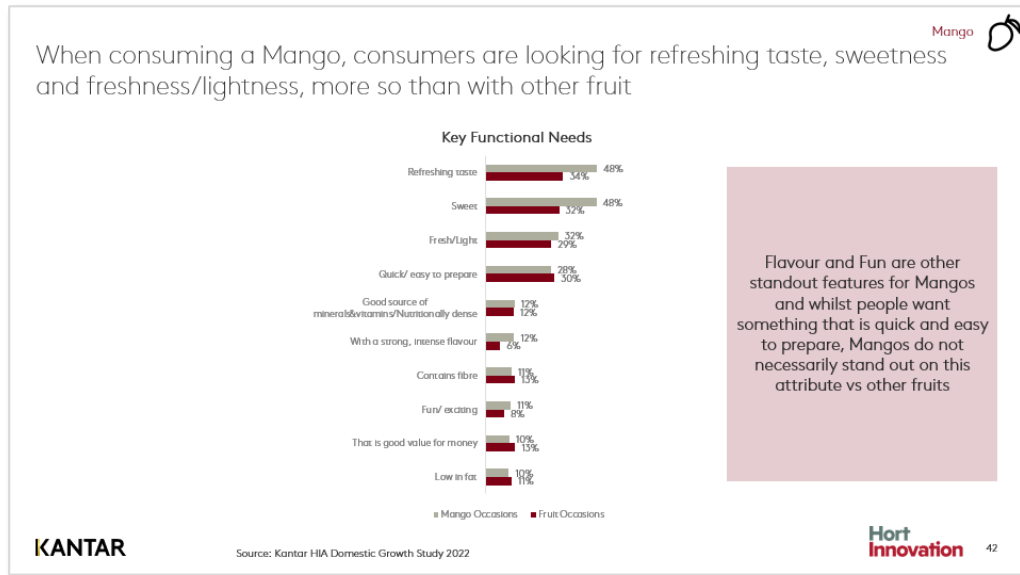


## 6. Appendix A: How to use this report



## How to use this report

### Slide 43: Category Drivers



### How we ask the question

Respondents who have consumed the commodity in the last 4 weeks are asked to describe the last occasion on which they consumed the commodity. They selected the top 3-5 reasons that they chose to consume the commodity.

### How to read the data

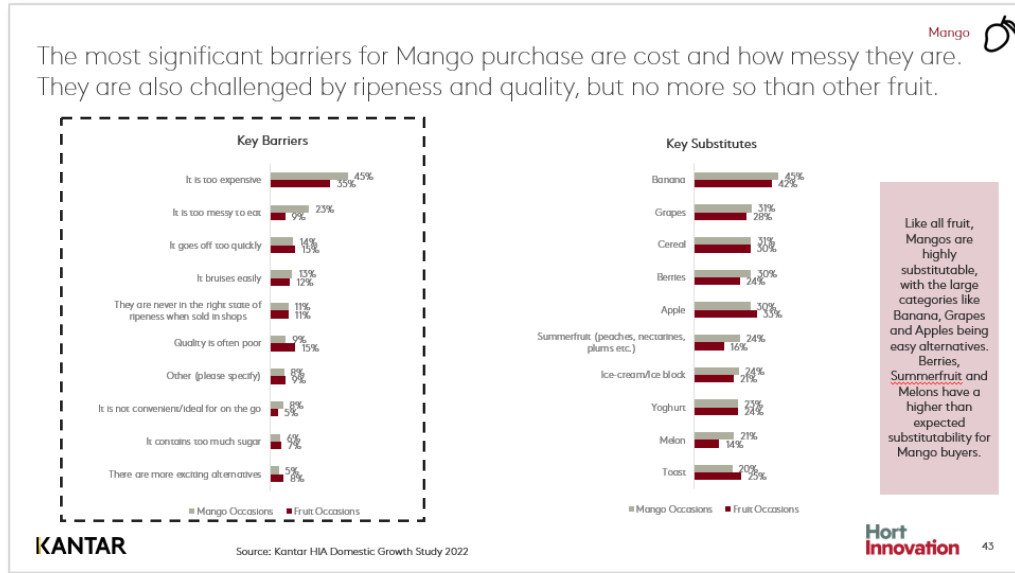
The charts provide the % who selected each reason for choosing the commodity. The higher and lower than average bars indicate higher and lower % scores for the commodity vs. the average of all fruit.

### How to use the data

Attributes that have high scores are the most important reasons that people choose the commodity. Attributes that are higher than average are strengths for the commodity vs other fruit sub categories.

## How to use this report

### Slide 44: Category Barriers



### How we ask the question

Respondents who have consumed the commodity in the last 4 weeks are asked to describe the last occasion on which they consumed the commodity. They were asked to select all the reasons they may not choose the commodity in that same occasion.

### How to read the data

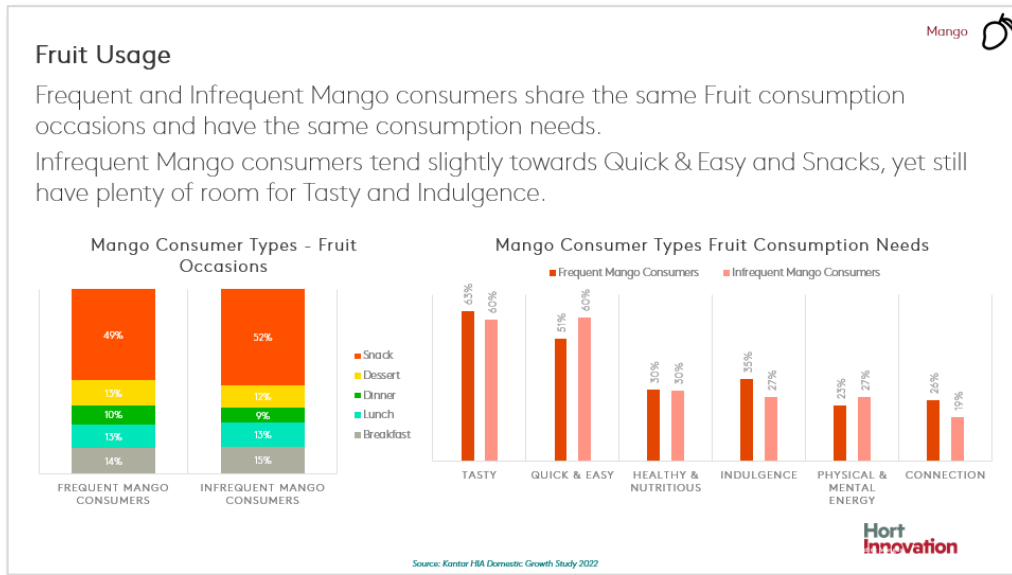
The charts provide the % who selected each reason they may not choose the commodity. The higher and lower than average bars indicate higher and lower % scores for the commodity vs. the average of all fruit.

### How to use the data

Attributes that have high scores are the most important reasons that people don't choose the commodity. Attributes that are higher than average are bigger barriers for the commodity than for other fruit. Attributes that are lower than average are smaller barriers for the commodity than other fruit.

## How to use this report

### Slide 45: Light v Heavy Users



### How we ask the question

Respondents who have consumed the commodity in the last 4 weeks are asked to describe the last occasion on which they consumed the commodity. They were asked to select all the reasons they may not choose the commodity in that same occasion.

### How to read the data

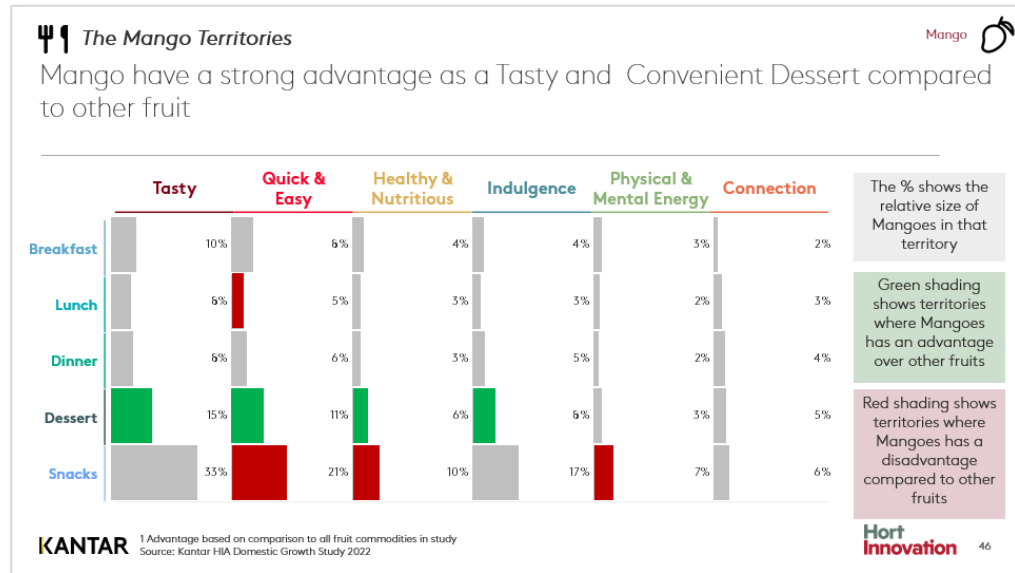
The charts provide when consumers last ate the commodity and the % who selected each reason for choosing the commodity. The charts show light users vs heavy user. Heavy users eat the commodity at least once a fortnight. Light users eat the commodity once a month or less.

### How to use the data

Attributes that have high scores are the most important reasons that people choose the commodity.

## How to use this report

### Slide 46: Category Territories



### How we ask the question

Respondents who have consumed the commodity in the last 4 weeks are asked to describe the last occasion on which they consumed the commodity. They selected the top 3-5 reasons that they chose to consume the commodity. Using an understanding of their occasion and their needs, we map the commodities 'territories' against the Horticulture Demand Framework.

### How to read the data

This provides the % of all the commodity's needs and occasions. As respondents had an average 2.2 needs for every occasion, the numbers add up to more than 100%. The green and red bars indicate respectively higher and lower %'s for the commodity compared to the average of all fruit.

### How to use the data

High %'s are the largest demand territories for the commodity. Territories that are higher than average are strengths for the commodity vs other fruit sub categories. Territories that are lower than average are weaknesses for the commodity vs other fruit sub categories.



## 6. Appendix B: Needs Pillar Detail

# Tasty

---

*We all have to eat, right? But if I'm going to really satisfy my hunger I need something that is super tasty, that tantalizes my tastebuds and stimulates all my senses.*

*Food should always be satisfying with a refreshing buzz that even the pickiest of eaters in the household will eat!*



*Tasty*

Needs to deliver...

**A refreshing sensory experience that promises delicious and consistent tastes that everyone loves**



### **Really Tasty**

*Produce that provides a great sensory experience*



### **Refreshing**

*Produce that refreshes the palate*



### **Everyone will eat it**

*Produce that I know everyone in my house will like and eat*

 What?

---

Food is seen as a pleasure rather than a fuel

---

 When?

---

Table stakes for all meal occasions – heightened for weekend dinners

---

 With whom?

---

Typically with partner & family

---





# Quick & Easy

---

*We're about to head out and we need a snack that we can eat while we're on the go – it's been a busy day so it's going to have to be something we already have in the fruit bowl.*

*I'm getting hungry and thinking about dinner but I can't be bothered to cook. I need something that is quick & easy, that I've made a million times and that doesn't require much thought – I'm thinking omelettes!*



*Quick & Easy*

Needs to deliver...

# A convenient experience that doesn't require much thought or preparation and good to go



**Quick  
& Easy**

*Produce that requires  
little to no preparation*



**Doesn't require  
much thought**

*Produce I know what to do  
with*



**Can consume  
on the go**

*Produce that is good for  
eating on the go*



**Already had it  
available**

*Produce that is readily  
available at home/work*

 **What?**

---

I'm not in the mood to cook  
and often eat the same  
thing out of habit

---



 **When?**

---

Most important for those  
snacking moments – and  
also weekday dinners

---



 **With whom?**

---

Typically  
on my own

---



# Healthy & Nutritious

---

*Your health is your wealth and so I really try and focus on making sure I cram my body full of all the goodness it needs with three healthy meals a day.*

*I make sure to be careful with what I eat during the week ensuring I meet certain macro nutritional goals to help maintain my weight as I get older. This also means I can indulge a little on the weekend and not feel guilty about it!*



*Healthy & Nutritious*

Needs to deliver...

**A guilt-free experience that provides me all the goodness  
my body needs**



**Nutrition my  
mind/body needs**

*Produce that provides the  
nutrition my body needs to  
thrive*



**Guilt-free**

*Produce that I don't have  
to feel guilty about eating*



**Weight  
management**

*Produce that helps me  
manage my weight*



**Nutritional  
goals**

*Produce that helps me meet my  
macro/nutritional goals*

# Healthy & Nutritious

## What are you looking for?

---

I prefer to eat more vegetables & less meat

---



## When?

---

Most important for main meals – particularly during the work week

---



## With whom?

---

Typically on my own

---



# Indulgence

---

*Food can be such a pleasure and life is for enjoying! When you've had a long week there is nothing better than making a dish close to your heart whether that's my grandma's apple pie or my partner's favourite pasta.*

*It's a moment to treat yourself and unwind from the week. And when you are craving something close to your heart nothing else quite hits the spot!*



*Indulgence*

Needs to deliver...

An indulgent experience that provides me with a moment of pure pleasure and comfort



**Treat myself  
or others**

*Produce that feels like an  
indulgence*

**Satisfy  
a craving**

*Produce that satisfies what  
my body is craving*

**Relax &  
Unwind**

*Produce that helps me  
relax and unwind*

**Comforting**

*Produce that provides  
comfort or is nostalgic*



# Indulgence

## What?

I'm happy to pay a premium for quality food in this moment



## When?

Most prevalent when eating dessert & snacking



## With whom?

Can be either on my own or with family and friends



# Physical & Mental Energy

---

*I make sure to start my day with a breakfast that will provide me with long sustaining energy to see me through my busy day at work.*

*By mid afternoon my motivation is dwindling. My stomach is rumbling and I am craving a snack. I need something that will satisfy my hunger and give me that burst of energy to make it through the rest of my work day.*

## *Physical & Mental Energy*

Needs to deliver...

# An **reinvigorating experience** that **fuels my body and provides me with the energy I need**



### **Quick energy boost**

*Produce that provides an immediate burst of energy*



### **Long lasting energy**

*Produce that gives me a sustained energy boost*



### **Stops hunger**

*Produce that stops me feeling hungry*

# Physical & Mental Energy

## What?

In this moment, food is a fuel more than a pleasure



## When?

Breakfasts, snacks and sometimes lunch – particularly during the week



## With whom?

Most commonly on my own



# Connection

---

*Is there anything better than connecting over a meal with the ones you love? Food has such a great way of bringing people together.*

*I love the festive season for exactly this reason! Some of my favourite foods come into season and I get to enjoy and explore new and different flavours that we don't usually eat in our regular meals*



**Connection**

Needs to deliver...

**A unifying experience that creates a special moment with something a bit different**



**Good for sharing**

*Produce that is good for a crowd*



**Create a special moment**

*Produce that makes a moment more special*



**Festive**

*Produce that is celebratory of the moment*



**New & different**

*Produce that provides new or different tastes and flavours*

# Connection

 **What?**

---

In this moment I enjoy  
trying new tastes &  
cuisines

---



 **When?**

---

Desserts and weekend  
dinners

---



 **With whom?**

---

Family & friends

---

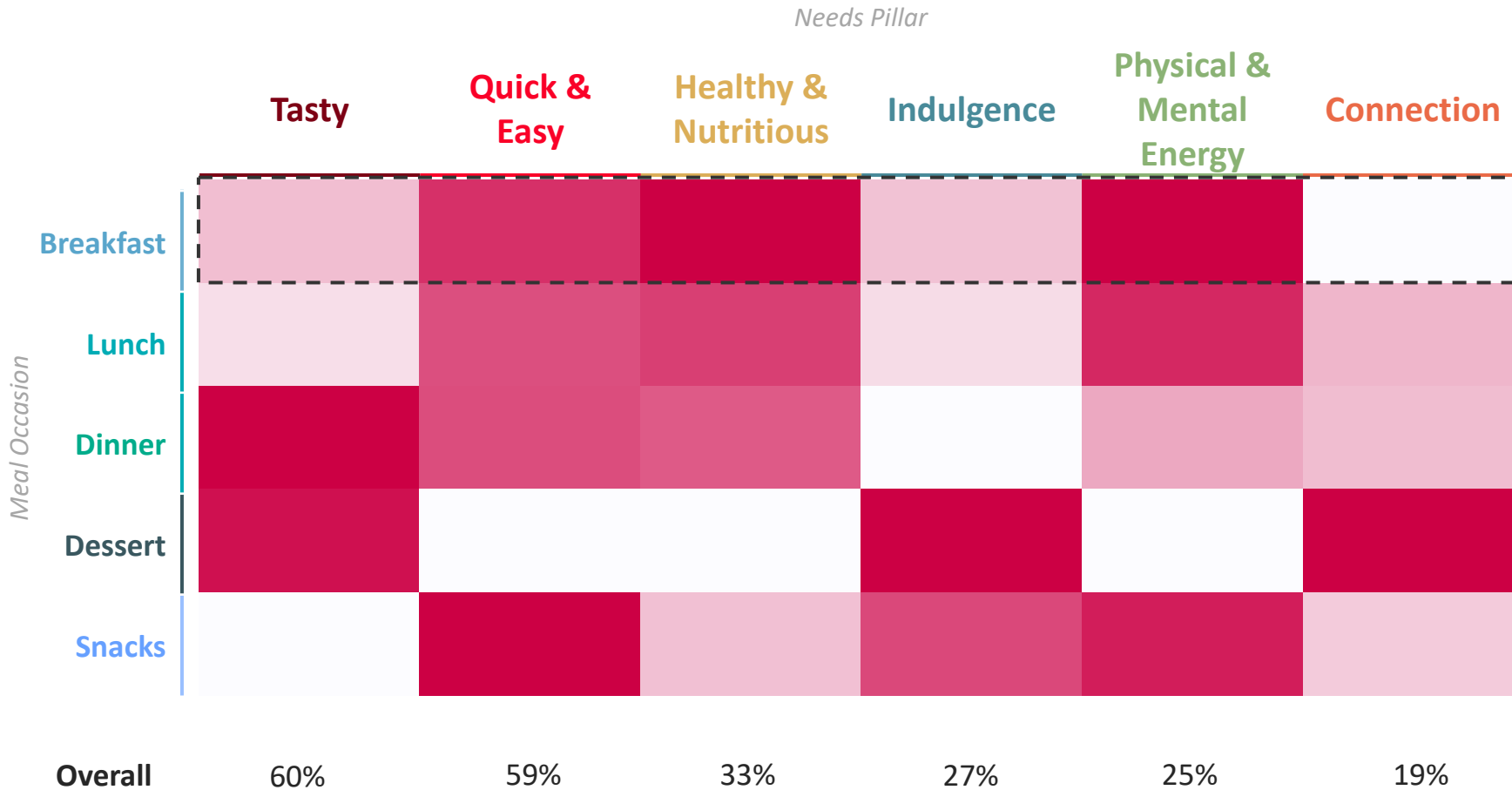




## 6. Appendix C: Demand Space Detail



# At Breakfast time *Needs* skew towards *Convenience* and *Health*



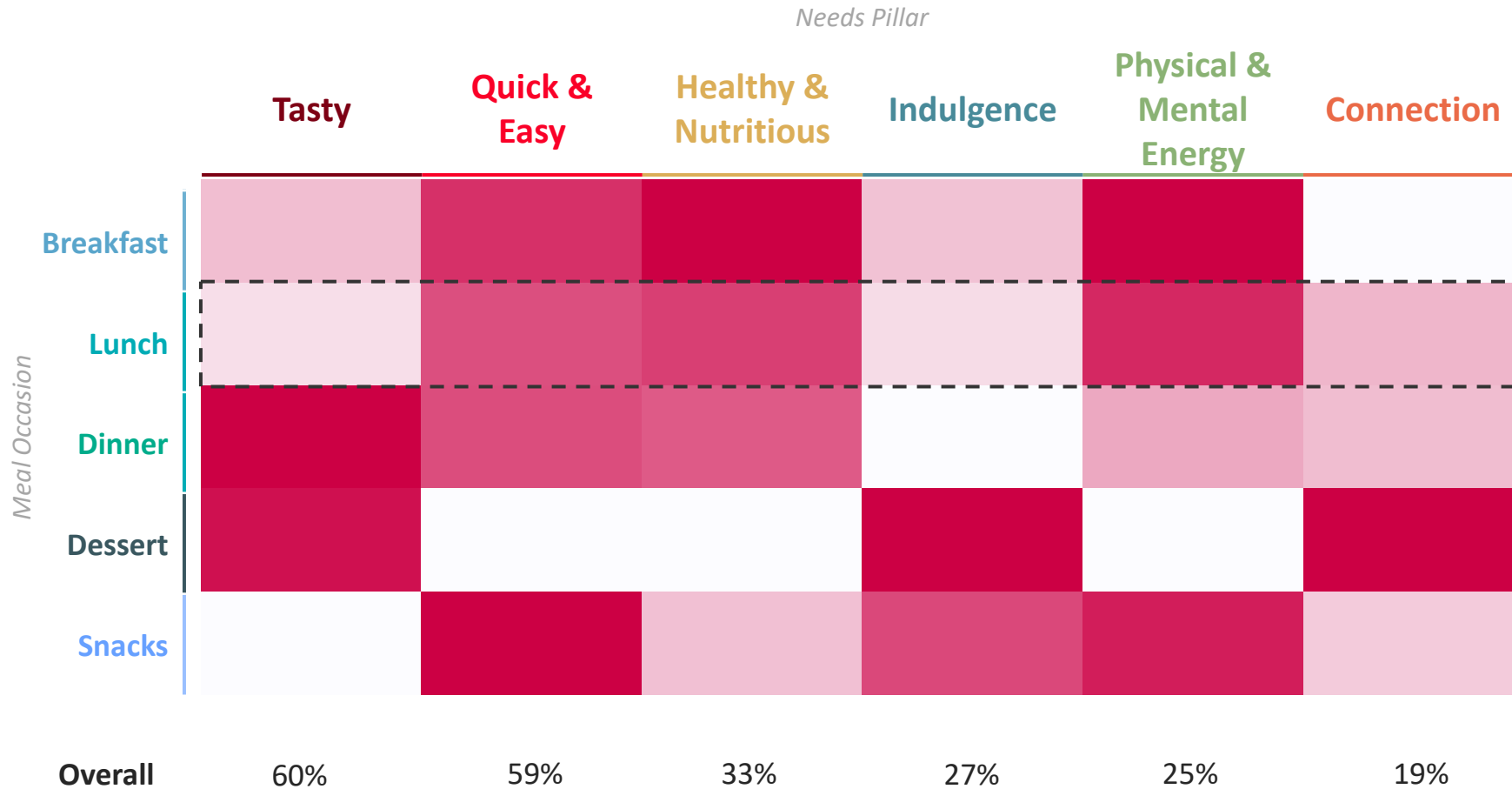
✓ **What it is**

Breakfast is all about Health, Convenience & Energy

✗ **What it isn't**

At Breakfast time people are not typically looking for Connection or Indulgence

# Lunch is about being sensible – *Energy, Health and Convenience* trump



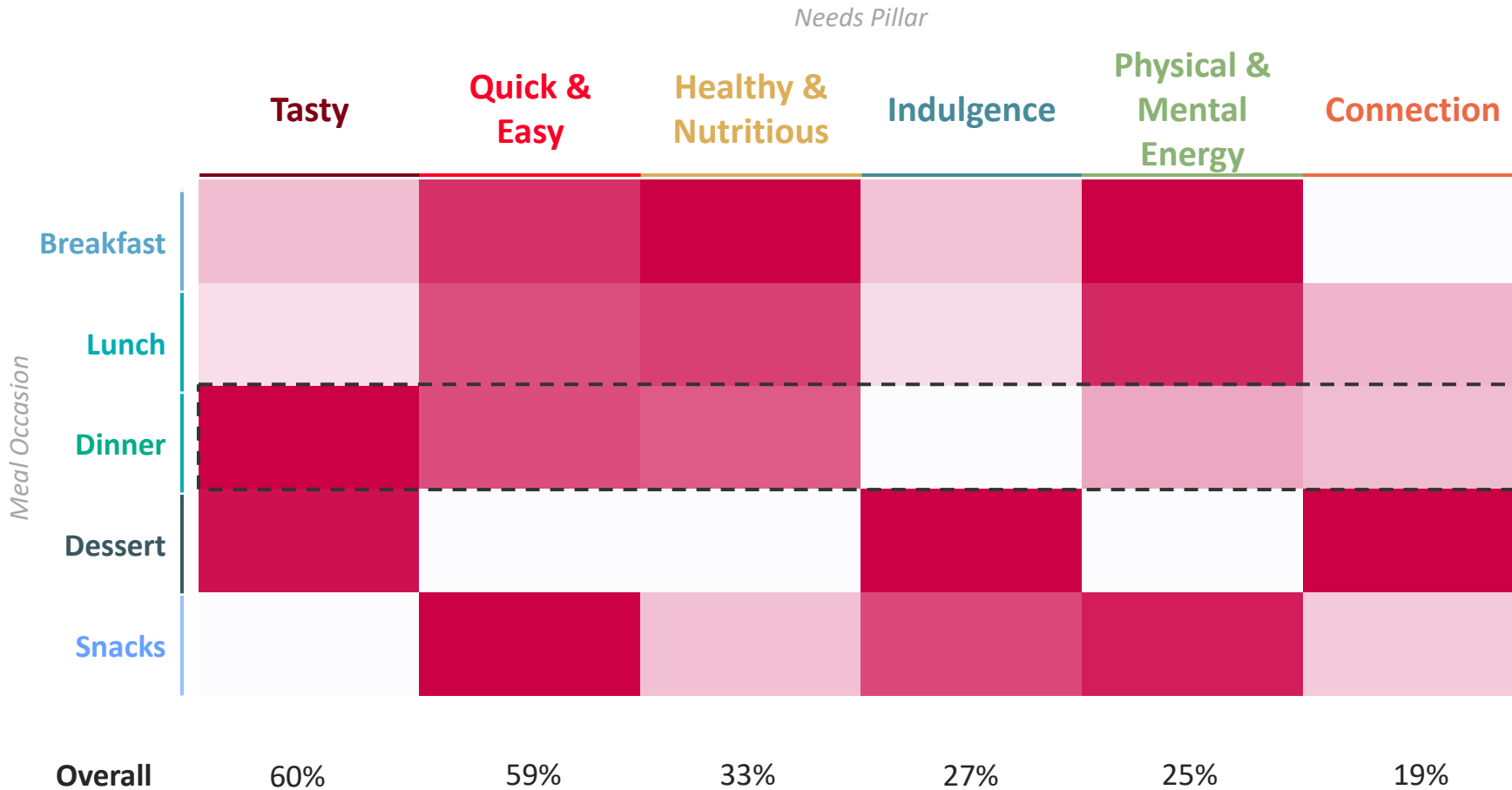
✔ **What it is**

Lunch needs to be Quick & Easy and a Nutritious moment

✘ **What it isn't**

Lunch is less about Connection and not typically Indulgent

# Dinner needs to be liked by everyone in the household



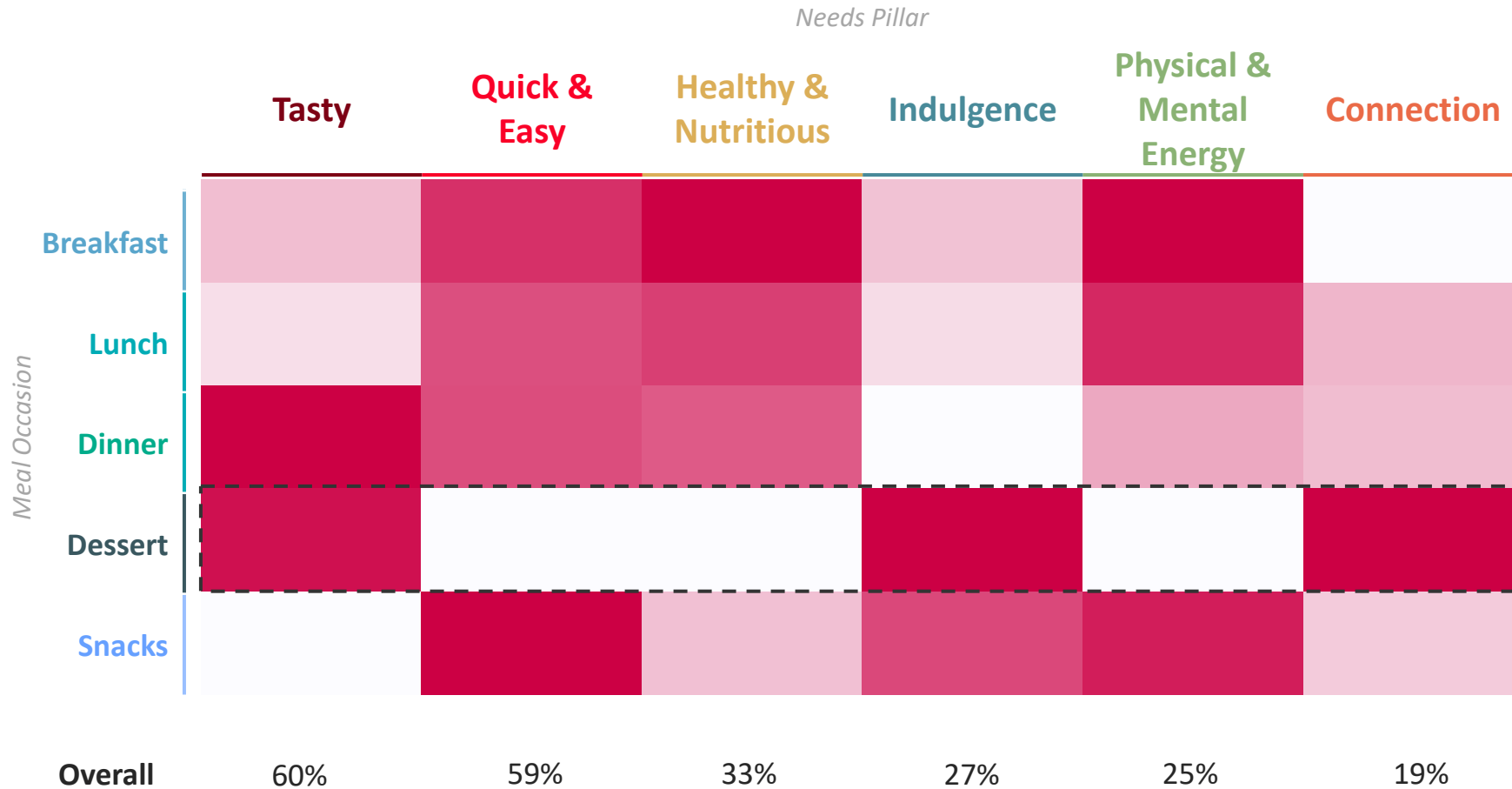
✔ **What it is**

Dinner needs to be Tasty and Something Everyone Will Like that Doesn't Take too long to Prepare

✘ **What it isn't**

It's the end of the day and I'm not looking for an Energy Boost from Dinner

# Dessert is all about *Connecting* and *Indulging*



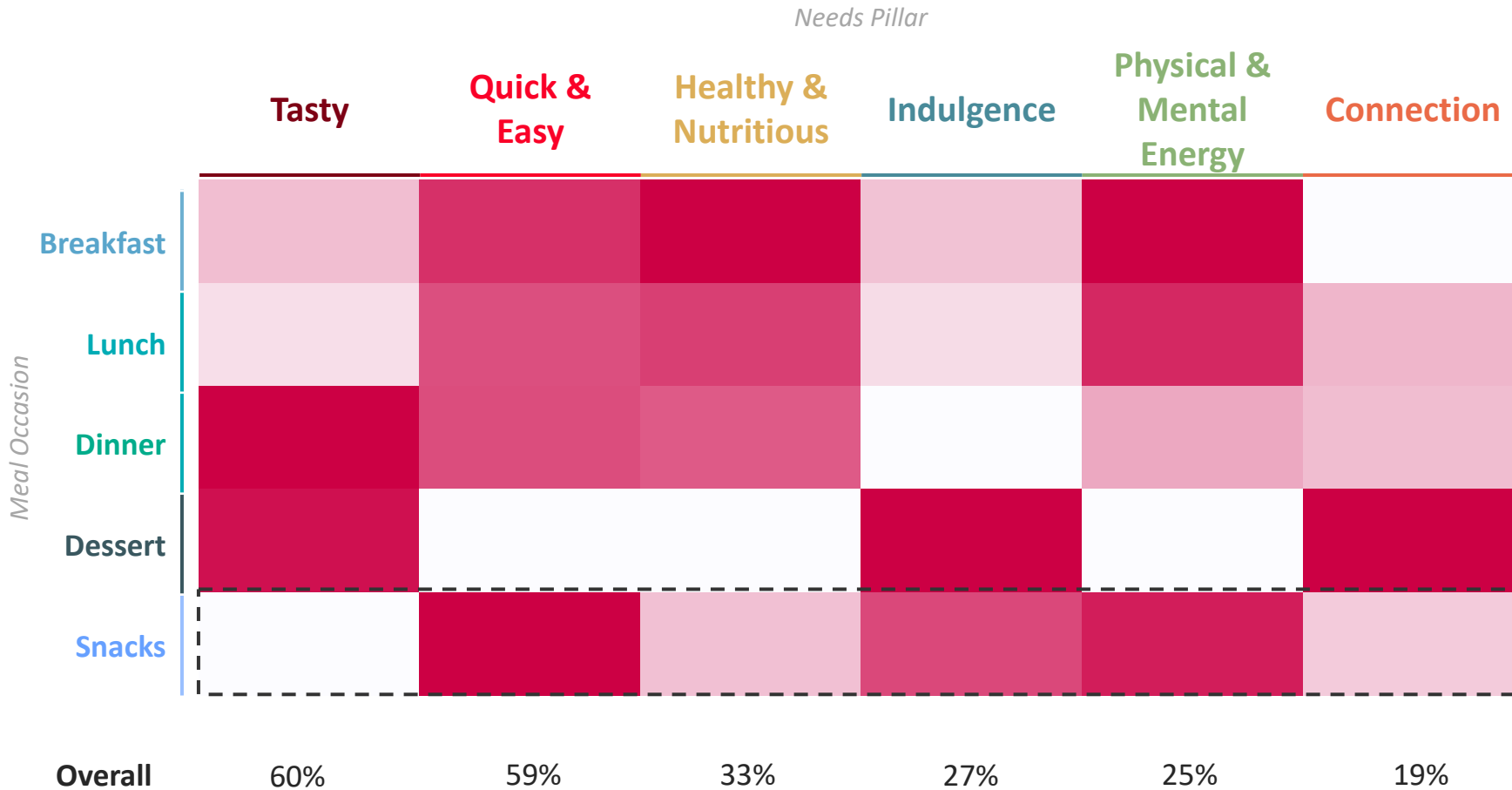
✔ **What it is**

Dessert is a moment for true Indulgence & Connection with those around me

✘ **What it isn't**

I don't mind if Dessert takes a little more Effort and I'm not thinking too much about Nutrition

# Snacks need a feeling of *Indulgence* while being *Quick & Easy*



✓ **What it is**

Convenience is king here. I'm looking for Energy & a small feeling of Indulgence from my snacks

✗ **What it isn't**

I'm generally on my own and not looking for anything overly Healthy when Snacking