AUSTRALIAN GRAPES

Project TG-19003 –
Table Grapes Consumer Acceptance & Attitudes
Seasonal Deep Dive March 2021

EXECUTIVE SUMMARY

PROGRAM OBJECTIVES

We are currently in the ‘Monitor’ phase with this report covering the findings from the first Seasonal Deep Dive. Where possible, we will compare back to the ‘Discover’ stage Quantitative Benchmark Survey.

DISCOVER

We will commence the project with an all important Discover Phase. This phase will provide a thorough understanding of consumer attitudes and purchase behaviours regarding Table Grapes, including barriers, triggers, substitution, quality perceptions and path to purchase.

Online Focus Groups

4 online mini groups with main grocery buyers that regularly buy grapes.
Explore:
Drivers of liking
Triggers & Barriers to purchase
Path to Purchase

Quantitative Benchmark Survey

Online quantitative custom research.
n=400 20 minute surveys
Nat. rep. sample of Australian fruit buyers.
Measure: Awareness, consideration, triggers and barriers to purchase
Statistically derive drivers of consumer acceptance to be included in Homescan survey

BUILD

Working session with Hort Innovation to review and analyse insights from Phase 1. Nielsen will provide recommendations on what measures should be carried through to monitor phase for discussion.

MONITOR

Ongoing measurement and diagnostic assessment of quality perceptions using Nielsen Homescan panel. Seasonal deep dive attitude and behavioural measurement as/if required (depending on results from Homescan study)

Homescan Quality Performance Tracker

From Nov-May each year we will conduct 3 dips of **assessment** and **reporting of KPIs**:
80% benchmark being achieved or not; and why using drivers of liking
Validation of time to recover from a bad experience

Seasonal deep dive (1 per year)

Online quantitative custom research.
n=400
10 minute surveys with same target group
Measure: cut down KPIs from benchmark survey
Conducted Mar each year

EXECUTIVE SUMMARY

Key points noted from all research conducted to date:

- Due to the seasonal nature of Australian Table Grapes, they hold a special place in the hearts of Australian consumers
- Grapes are seen to have the key benefits of being a convenient, easy and healthy snacking option, in addition to having a relatively long lifespan. Key benefits are dialed up in the consumer mindset during peak grape season
- Many are happy to substitute other fruits into their grape eating occasions, so if the availability, display or price is not right, it can lead to lost sales
- There is limited awareness of either the grape season or types of grapes in the market, but this does not appear to be an impediment to sales or quality perceptions with many feeling grapes were at their best when they had recently purchased them
- Consumers buying red, and in particular, black grapes, are more knowledgeable about grape varietals
- Fresh is best and shoppers use visual cues as well as pricing cues to trigger sales
- Many hold strong preferences for grape type (green), and grapes being seedless, but packing preferences for loose vs pre-packed are split
- Opportunity to improve country of origin communication on pack and in-store as many consumers reported this is important information that is hard to find

EXECUTIVE SUMMARY

Key points noted from all research conducted to date:

- Opportunity to work more closely with major supermarkets to optimise quality and displays. These are where the majority of grapes are being bought, but there is much to improve:
  - This is an impulse category, even among those who plan to buy, many make their minds up in-store
  - Point of Sale is key: visual cues of freshness trigger sales, and if there are availability issues, poor displays or limited stock rotation shoppers are turned off
- The Homescan results showed that the Consumer Acceptance KPI was met among shoppers who bought Australian Table Grapes in December 2020, in March 2021, and mid May 2021
- The Quantitative Deep Dive also saw strong consumer acceptance levels driven primarily by the grapes' firmness of flesh, flavour balance, freshness, crunch or crispness when bitten into, juiciness and taste (statistically derived from 11 different aspects)
- When we look more closely at mid season path to purchase behaviour we see the role for supermarkets being heightened. Whilst many consumers claimed to use other channels over time, past 4 week purchasing was heavily weighted towards supermarkets

EXECUTIVE SUMMARY

Key points noted from all research conducted to date:

- As a result, we see significantly more grapes being bought in pre-prepared plastic bags
- Key reasons for buying loose or in pre-prepared plastic bags remains consistent; convenience for pre-prepared plastic bags and control for loose. Interestingly, being able to test for quality has reduced for both pack types at the mid season mark – potentially a signal that quality is now more consistent
- Snacking remains the predominant occasion grapes are bought for, with entertaining dwindling at this time of the year
- Planned purchases of grapes has increased significantly, however, there is still a good proportion of grape buyers that decide exactly what they want only when in store. So, in-store remains key to get right, particularly in supermarkets
- Price, more so than appearance, is driving past 4 week sales. It is also a key factor in encouraging sales, and remains the key barrier to purchasing (although this has fallen as prices reduce and become more acceptable to consumers)

EXECUTIVE SUMMARY

Key points noted from all research conducted to date:

- Price sensitivity analysis shows the optimal price to gain maximum consumer buy in is between $3-$5 per kilo. This is backed up by Homescan sales data that showed that around 720,000 households bought in December when prices were around $10 per kilo and this has increased to over 1 million households as prices reduced in peak season
- Shoppers are generally satisfied with their experience of buying grapes regardless of the channel purchased
- Ease of finding grapes in supermarkets is important, and currently Woolworths is performing better than Coles on this factor
- Supermarkets in general need to focus on price, with shoppers more price sensitive than in other channels. Range and stock level improvements will also aid a better shopper experience
- Other, non supermarket channels, need to focus on improving ticketing and packaging

QUANTITATIVE METHODOLOGY

Methodology
Online survey amongst members of an online panel

Target Respondent
Australians aged 18+ who are the main grocery shoppers and not grape rejectors **AND past 4 week grape buyers***

Sample Size
n=404

Coverage
Nationally representative sample of the 18+ main grocery shoppers in Australia

Survey Duration
10 minutes

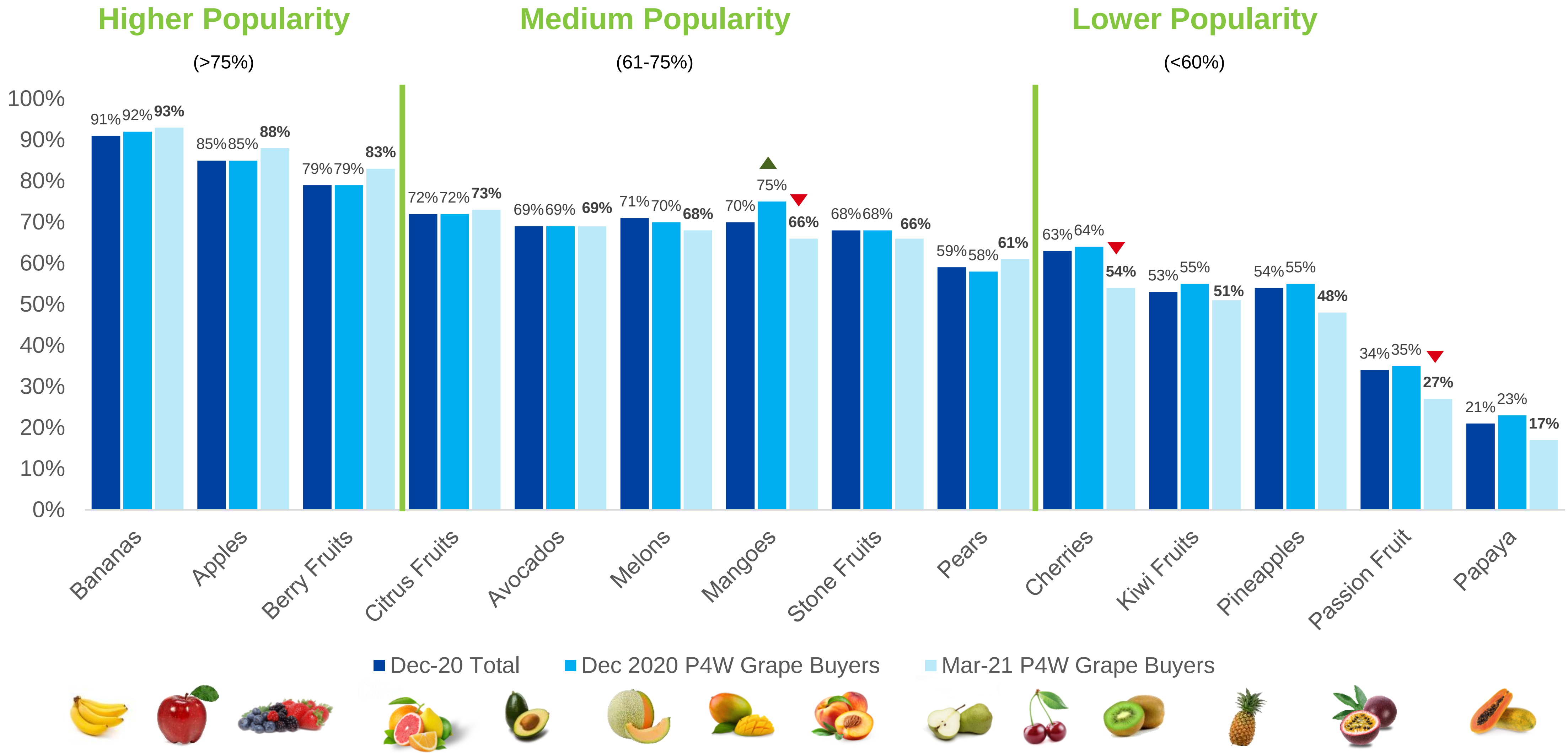
Fieldwork
22-31 March 2021

* New criteria for March 2021 Seasonal Deep Dive. Comparisons made back to December 2020 at both a total level and Past 4 Week grape buyer level (P4W Grape Buyers).

GENERAL PERCEPTIONS OF GRAPES

Past 4 week grape buyers reduced purchasing of seasonal fruits like mangoes, cherries and passion fruit

Highly popular fruits, like bananas and apples, increased, as did berry fruits.

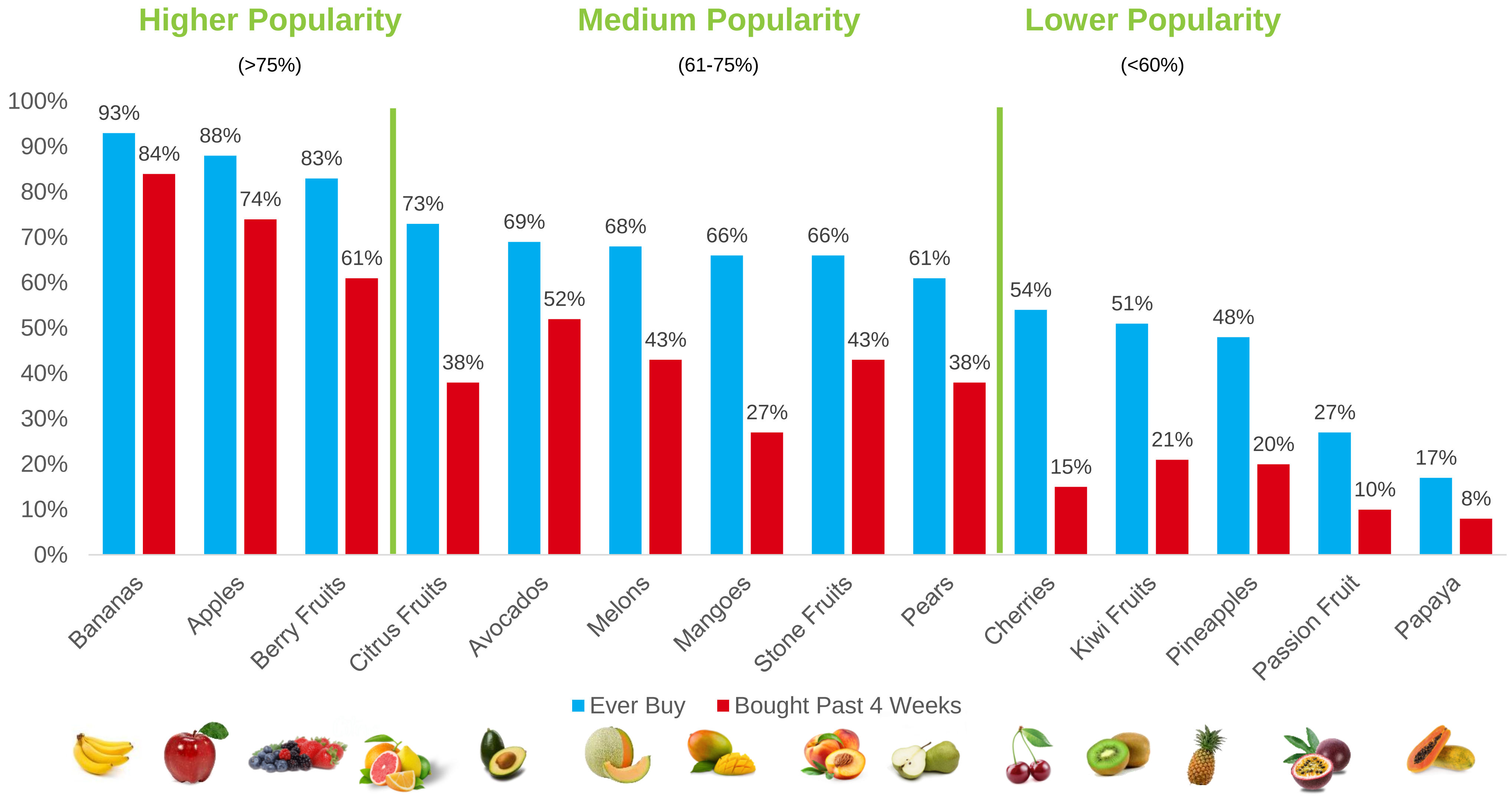


Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
S9. Which of the following fruit do you buy for either your own consumption or to share with friends and family members? [MA]
Q28. (Dec) Have you bought **Australian** grapes in the P4W? *P4W= Past 4 weeks

▲▼ Significantly higher/lower than December total
▲▼ Significantly higher/lower than the previous wave

A big seasonal impact noted on past 4 week purchase behaviour

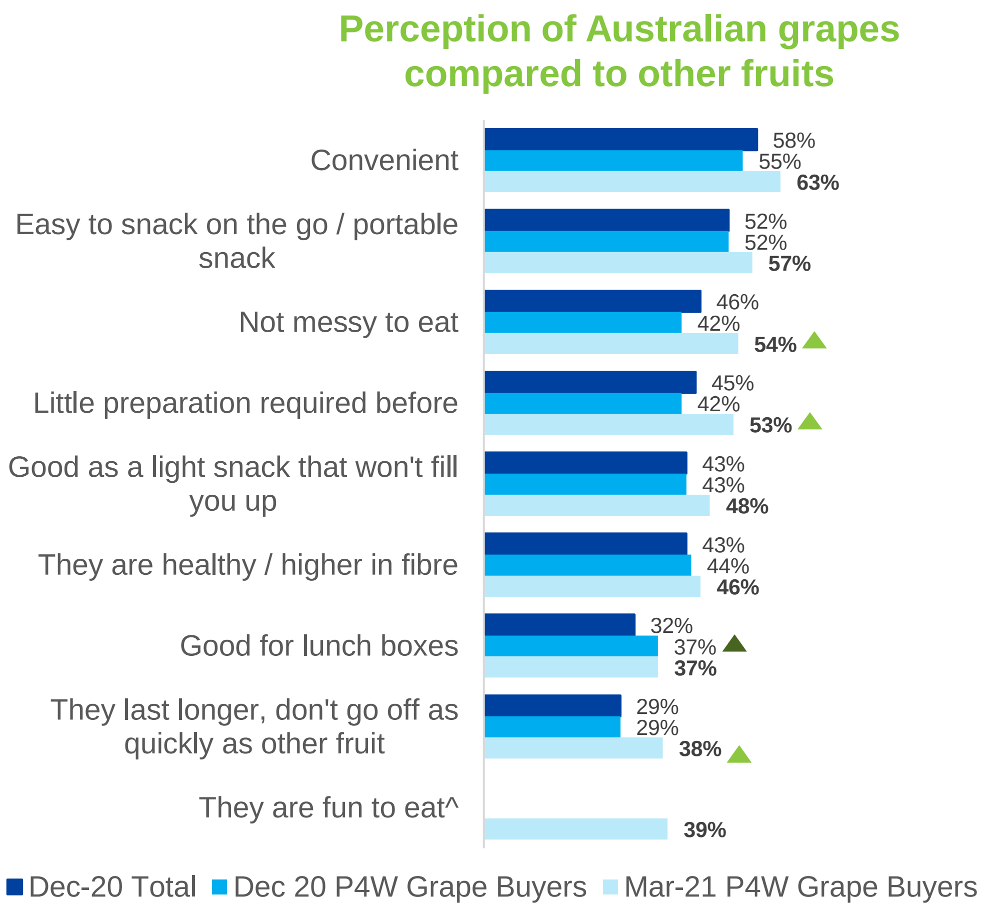
Biggest gaps from ever buying to recent buying noted for citrus fruits, mangoes and cherries. Of all respondents that bought grapes in the past 4 weeks, there is a very high cross purchase for many categories, again highlighting the potential substitution threat to grapes.

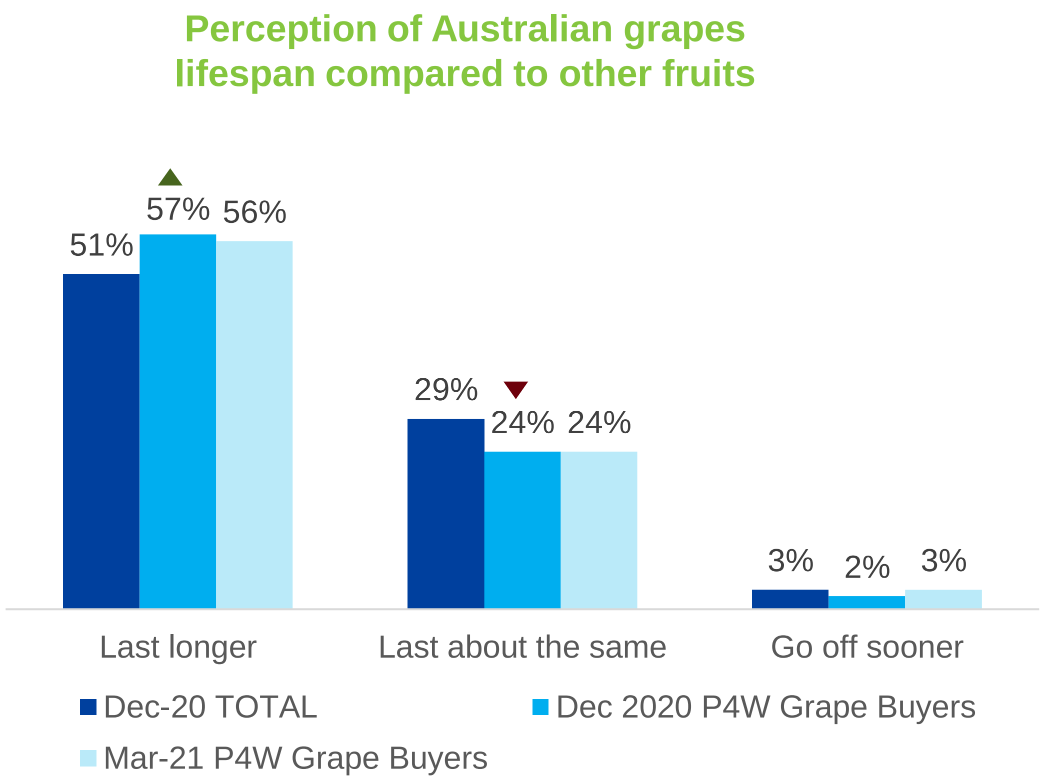


Base: All respondents: P4W grapes buyers (March 21 n=404)
S9 Which of the following fruit do you buy for either your own consumption or to share with friends and family members? [MA]
S9a. And which have you bought in the last 4 weeks? [MA]

Grapes have many perceived benefits, and these are stronger mid grape season

More frequent, past 4 week, grape buyers perceive grapes to last longer than other fruits – a key benefit to dial up to try to increase penetration and frequency of buying.





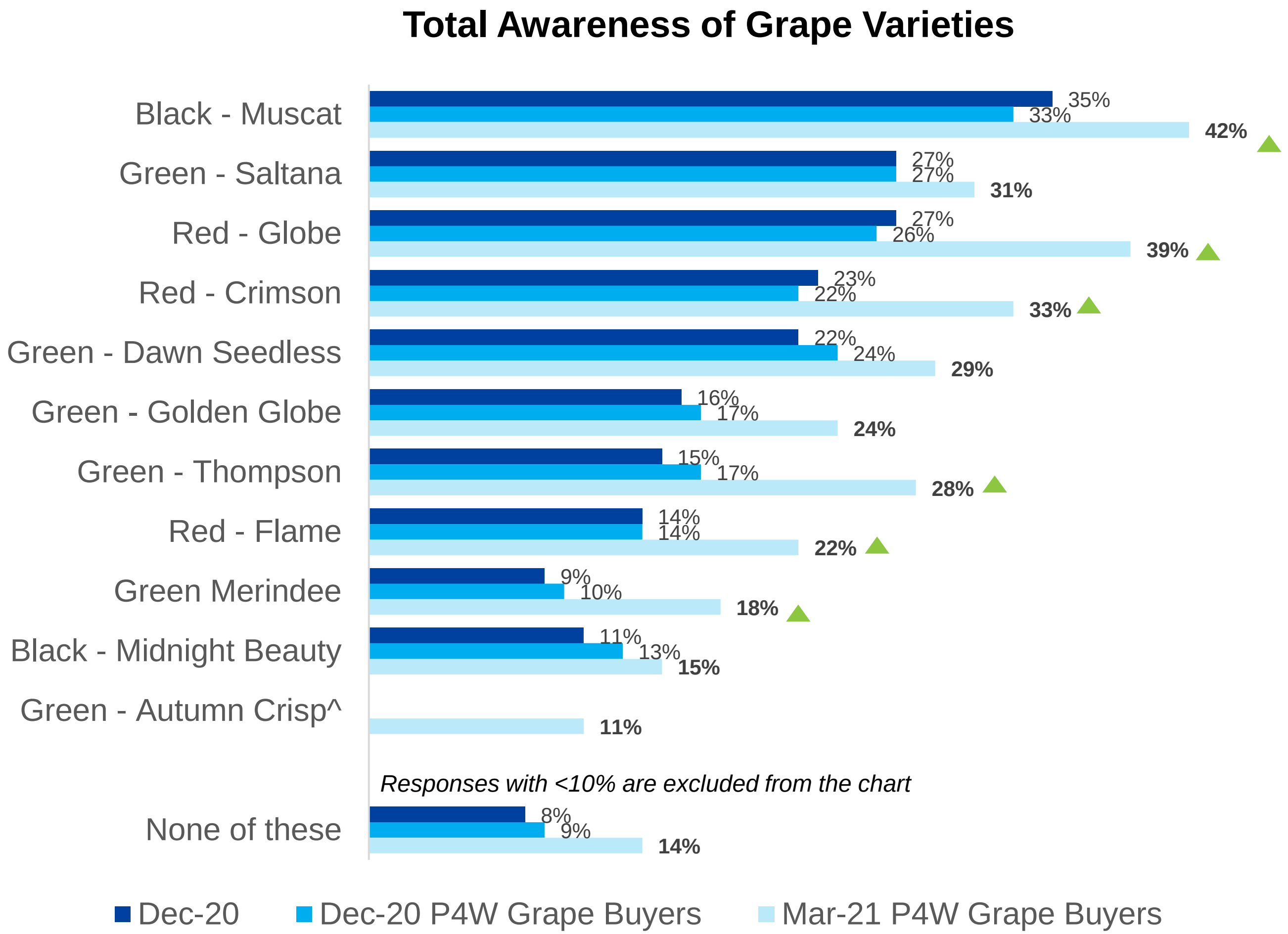
Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q11. What do you like about Australian grapes compared to other fruits you usually buy? [MA]
Q11a. Compared to other fruits you usually buy, how long do Australian grapes last before going off? [SA]
^ New statement added March 2021.

Significantly higher/lower than December total
Significantly higher/lower than the previous wave

AWARENESS AND KNOWLEDGE OF GRAPES

Knowledge of grape varieties has improved over the season

This is particularly true for red varieties where we have seen the strongest improvement in awareness for Red Globe and Red Crimson grapes. Past 4 week buyers of red and black varieties were more knowledgeable of varieties on offer.



	Total N=404	Green N=319	Red N=145	Black N=68
Green - Saltana	31	34	31	26
Green - Dawn Seedless	29	31	30	28
Green - Thompson	28	29	26	34
Green - Golden Globe	24	24	30	26
Green - Merindee	18	20	21	32
Green - Autumn Crisp	11	12	11	19
Green - Pristine	7	7	6	6
Green - Calameria	7	8	4	13
Green - Ohanez	5	5	4	9
Red - Globe	39	31	57	53
Red - Crimson	33	31	41	49
Red - Flame	22	19	34	24
Red - Ralli	7	7	13	19
Black - Muscat	42	41	45	62
Black - Midnight Beauty	15	13	24	36
Black - Autumn Royal	8	7	9	27
Black - Melody	7	6	9	17

Significantly lower than Total

Significantly higher than Total

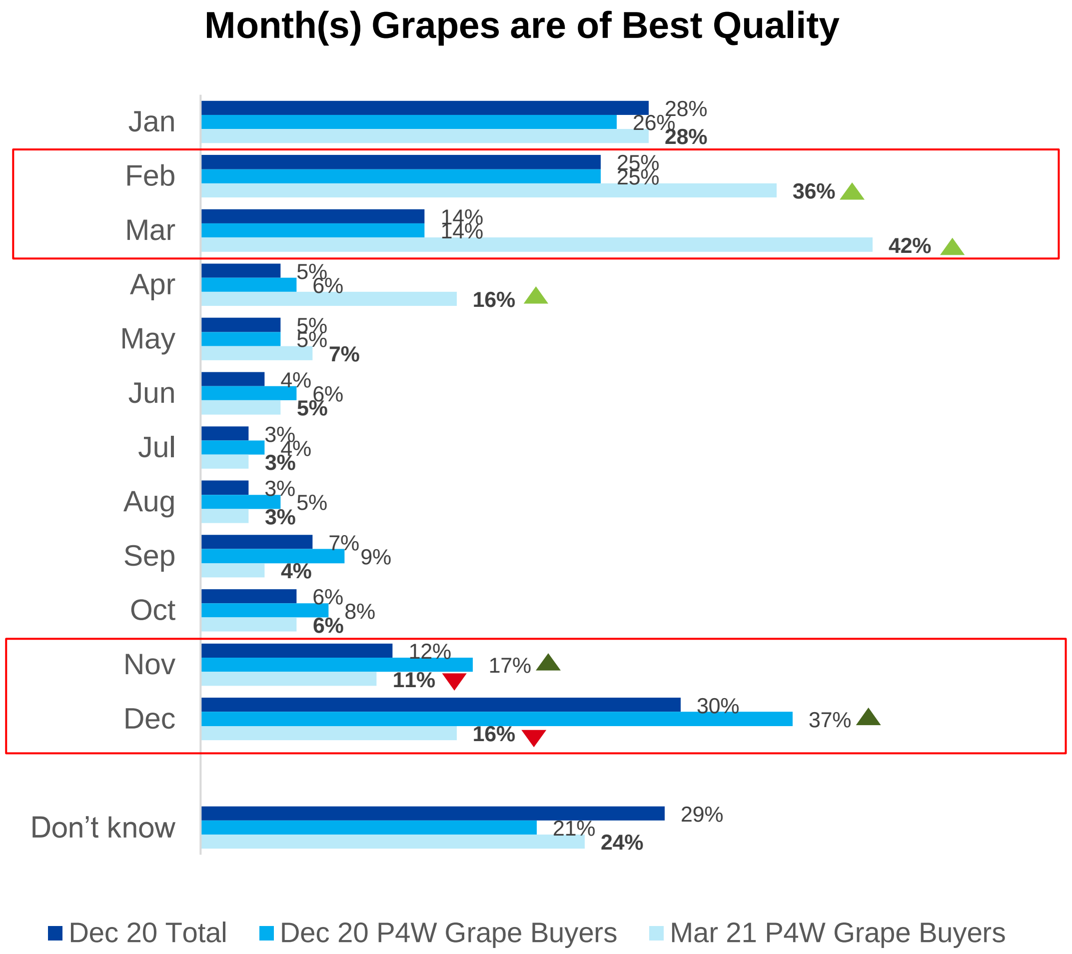
Significantly higher/lower than December total

Significantly higher/lower than the previous wave

Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q1. Thinking about Australian Grapes, what varieties can you think of?
Q2. Which of the following Australian grape varieties have you heard of before today? [MA]

While around a quarter of grape buyers don't know when grapes are the best quality…

Recent Past 4 Week buyers are significantly more likely to think it is when they have been purchasing frequently e.g. Nov/Dec for the past 4 week shoppers interviewed in December and Feb/Mar for the pas 4 week shoppers interviewed in March.



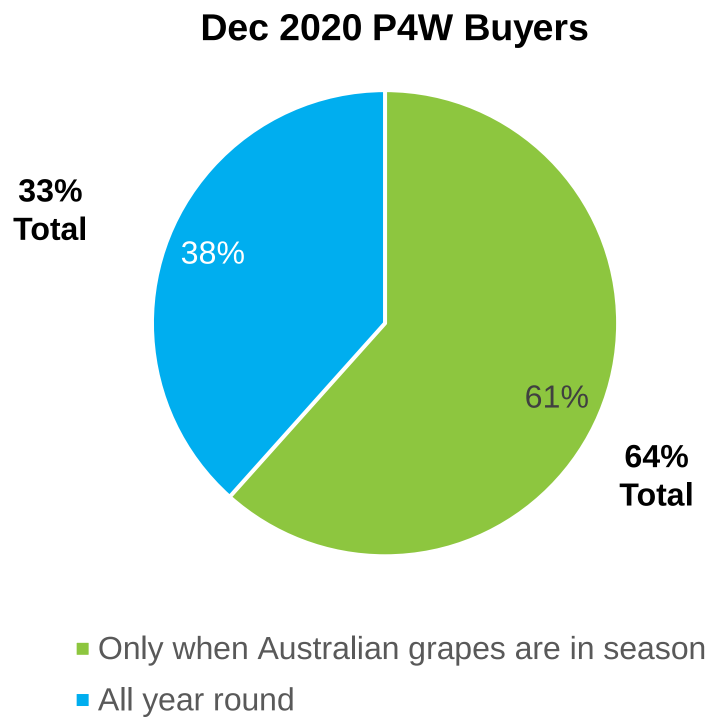
Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q4. When do you find Australian grapes to be the best quality? [MA]

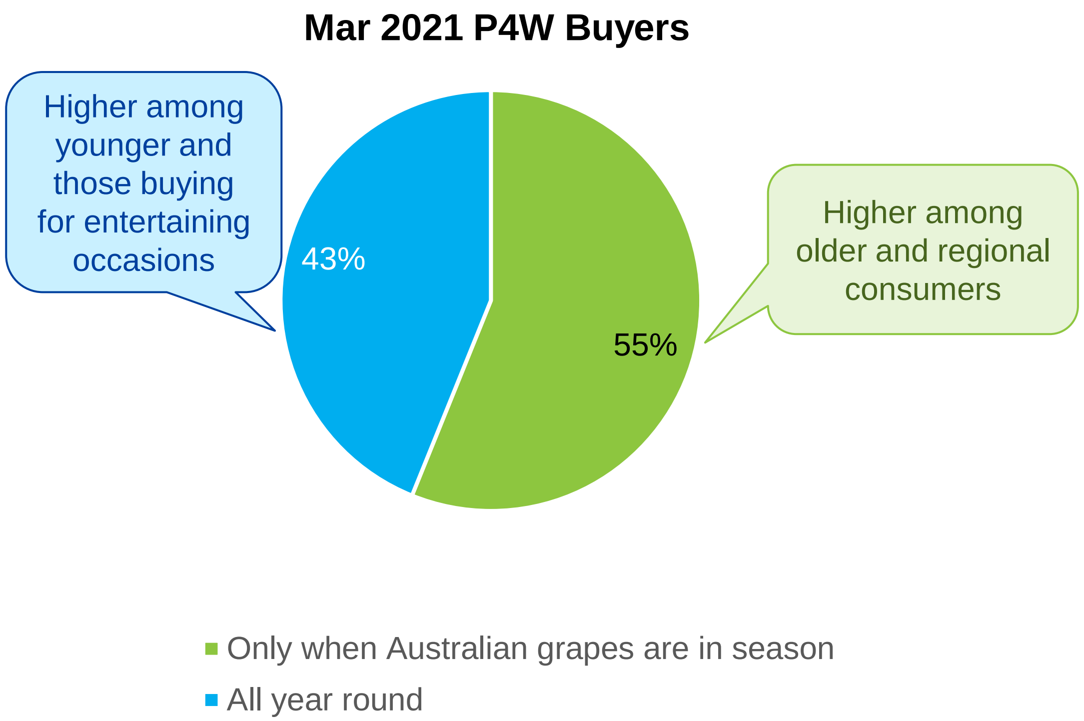
Significantly higher/lower than December total
Significantly higher/lower than the previous wave

The perception of only buying ‘in season’ grapes has softened

… With some gaps in knowledge of the grape season, shoppers seem to use the availability of grapes in store to cue ‘in season’. With grapes having been around for some time now, shoppers may be questioning if we are still ‘in season’ or now buying ‘all year around’.

WHEN DO YOU BUY GRAPES?





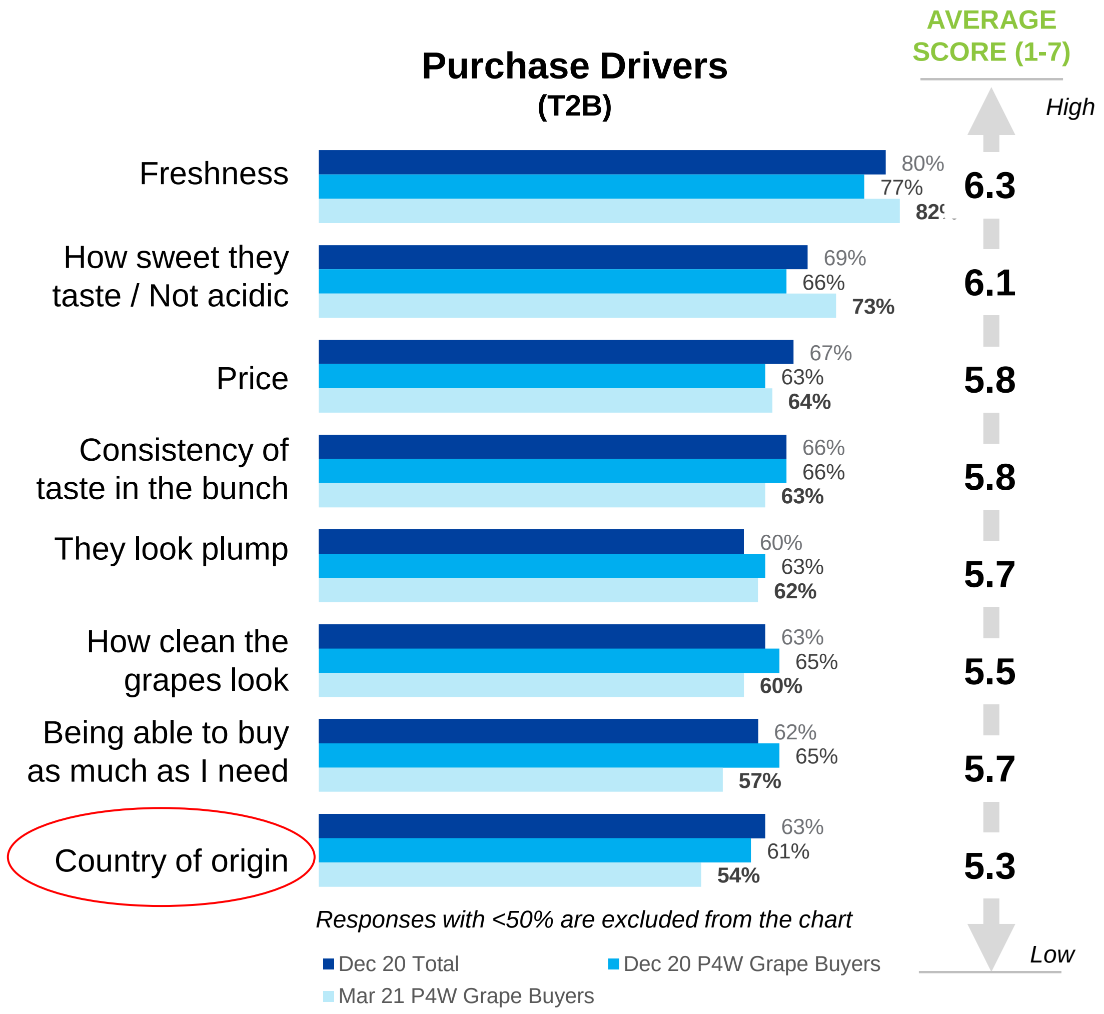
Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q5 When do you buy grapes? [SA]

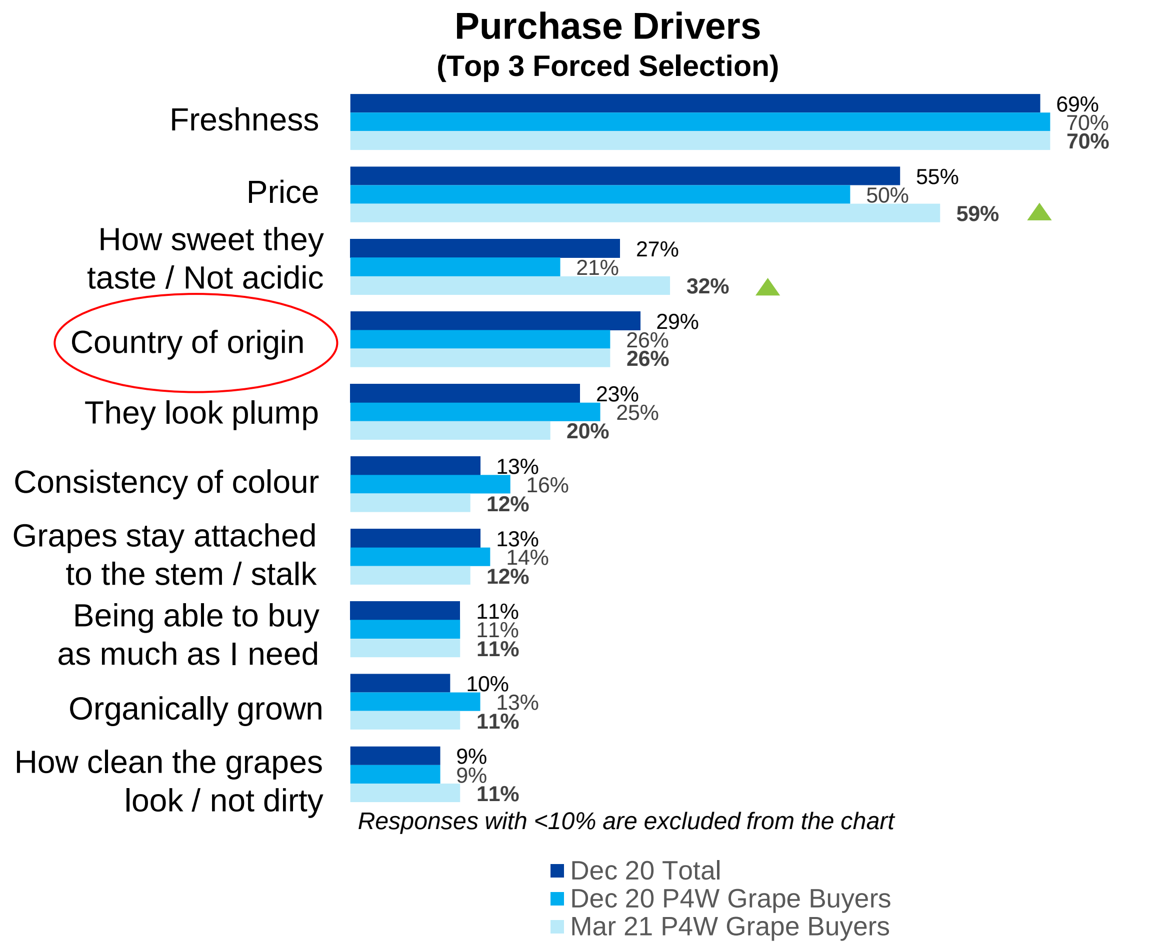
▲▼ Significantly higher/lower than December total
▲▼ Significantly higher/lower than the previous wave

PURCHASE CONSIDERATIONS AND PREFERENCES

Fresh and price remain key purchase drivers

Many factors are important to shoppers, but when forced to pick their top 3 drivers, ‘freshness’ remains of paramount importance. ‘Affordability’ and ‘taste’ have become significantly more important further into grape season. Country of Origin remains elevated when only the top factors are allowed to be selected.





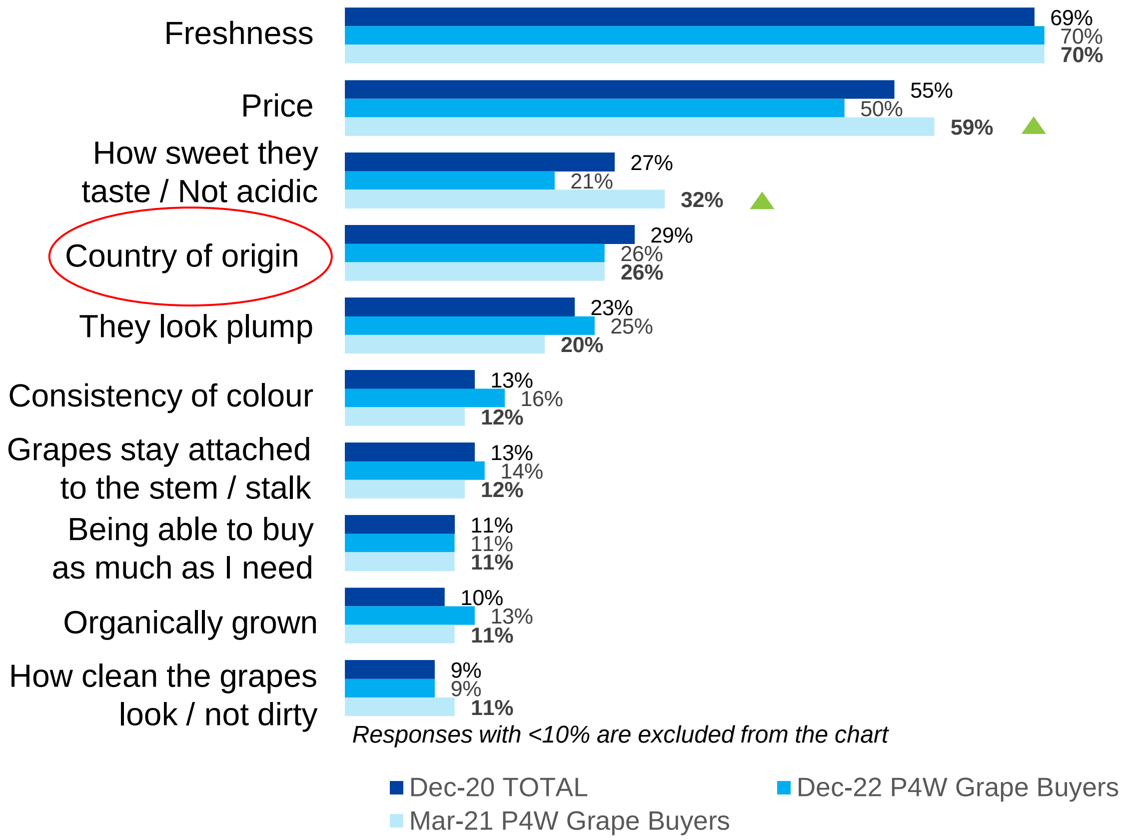
Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q6. When deciding to buy Australian grapes, how important is each factor to you? [SA]
Q7. Please choose the 3 most important factors when purchasing Australian grapes. [MA]

Significantly higher/lower than December total
Significantly higher/lower than the previous wave

FRESH AND PRICE REMAIN KEY PURCHASE DRIVERS

Demographics play a role in whether these factors are more or less important. Channel preferences are also highlighted with grocery shoppers factoring price higher in the consideration set, while local market shoppers are looking for organic and flexibility in amount bought.

PURCHASE DRIVERS
(Top 3 forced selection)



Factors	Significantly Higher Among
Freshness (70%)	NSW (77%), unplanned shoppers (76%)
Price (59%)	QLD (69%), grocery shoppers (62%)
How sweet they taste, not acidic (32%)	Unplanned shoppers (38%)
Country of origin (26%)	WA (43%), age 60+ (38%), no children (31%)
They look plump (20%)	Children aged 6-11 in household (31%)
Consistency of colour (12%)	
Grapes stay attached to the stem / stalk (12%)	QLD (19%)
Being able to buy as much as I need (11%)	Local market shoppers (21%), age 60+ (17%), Females (16%), no children in household (15%)
Organically grown (11%)	Local market shoppers (26%), children under 6 in household (20%), VIC (17%), age 18-39 (15%)
How clean the grapes look / not dirty (11%)	Children aged 6-11 in household (26%)

Base: All respondents (December TOTAL N=403; December P4W Grape Buyers n=217 / March 2021 P4W grape buyers n=404)
Q6 When deciding to buy Australian grapes, how important is each factor to you? [SA]
Q7 Please choose the 3 most important factors when purchasing Australian grapes. [MA]

▲▼ Significantly higher/lower than **December Total**
▲▼ Significantly higher/lower than the **previous wave**

THE PATH TO PURCHASE (PAST 4 WEEKS)

Significant increase in past 4 week purchasing of red grapes at the mid season mark

Unsurprisingly green grapes are still the most popular with almost 1 in 4 having purchased in the past 4 weeks.

Grape Varieties Purchased

	Dec 2020	Mar 2021
	72%	78%
	28%	38% ▲
	16%	18%

Bought more by young consumers and for breakfast occasions

Bought more for entertaining occasions

Base: Only respondents who bought grapes in the past 4 weeks (December P4W Grape Buyers n=217 / March 2021 P4W grape buyers n=404)
Q30. What colour / variety of Australian grapes did you buy? [MA]

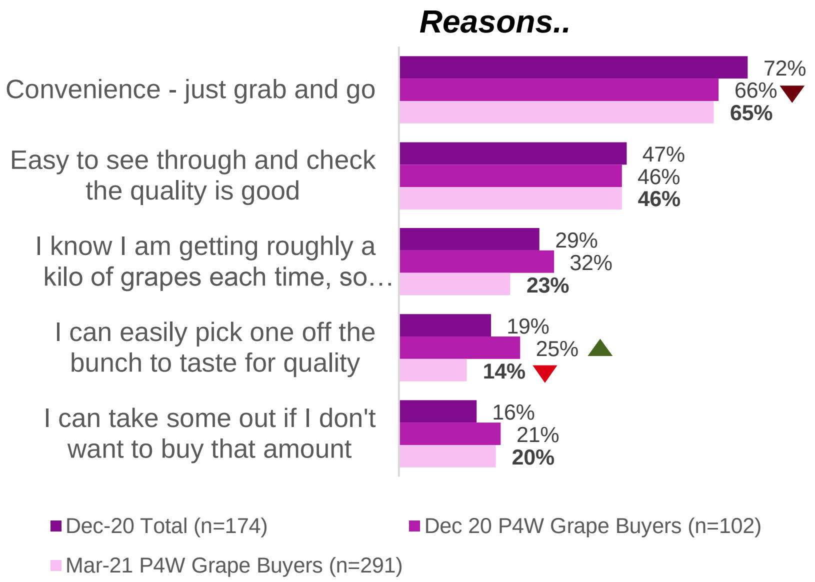
▲▼ Significantly higher/lower than December total

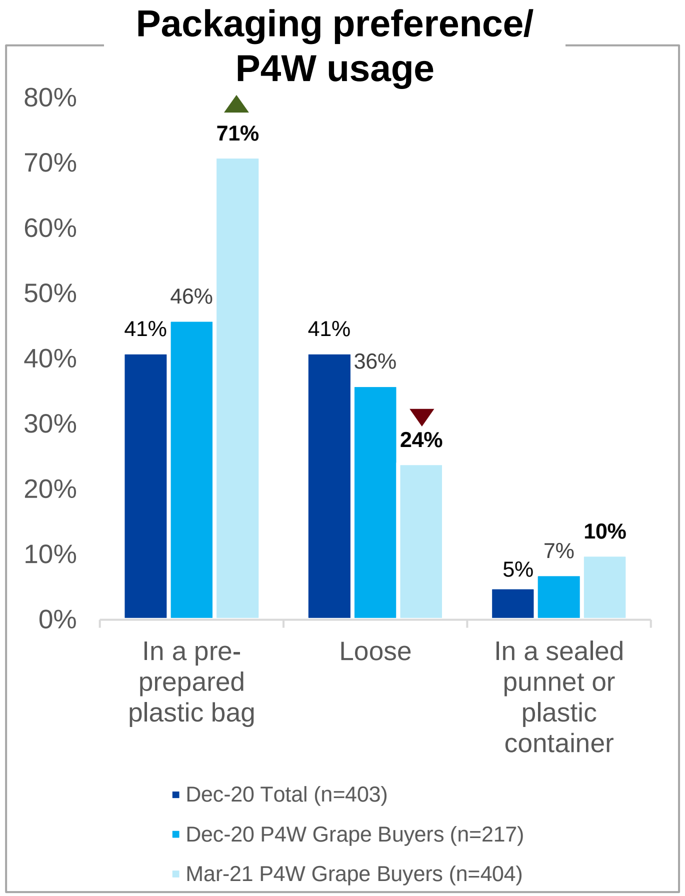
▲▼ Significantly higher/lower than the previous wave

Whilst packaging *preference* was split, most bought in pre-prepared plastic bags in the past 4 weeks

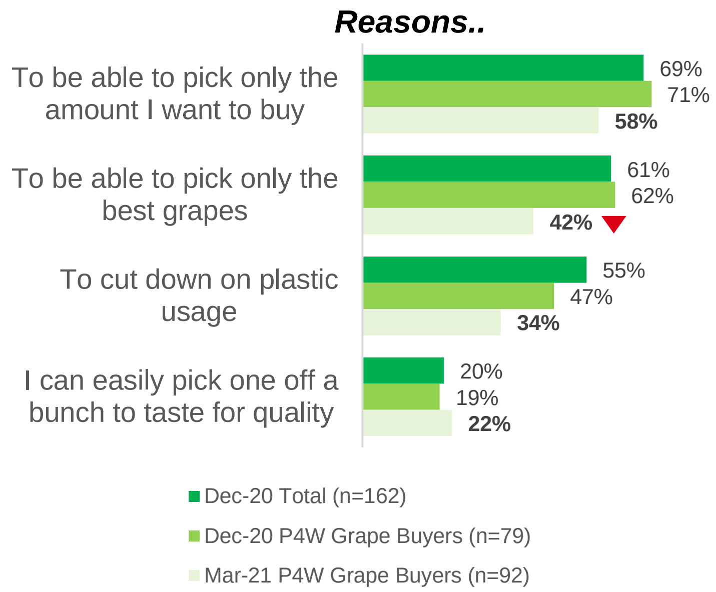
Pre-prepared plastic bags attract consumers who value ‘convenience’ and a fast ‘Grab and Go’ shopping experience. Consumers who bought loose grapes did so as they can pick and choose the best grapes, and in the amount that they want. In both instances, picking or checking for the best quality has declined in March, potentially as quality is at a peak and more consistent than in early season grapes and prices are now lower.

Pre-prepared Plastic Bag





Loose

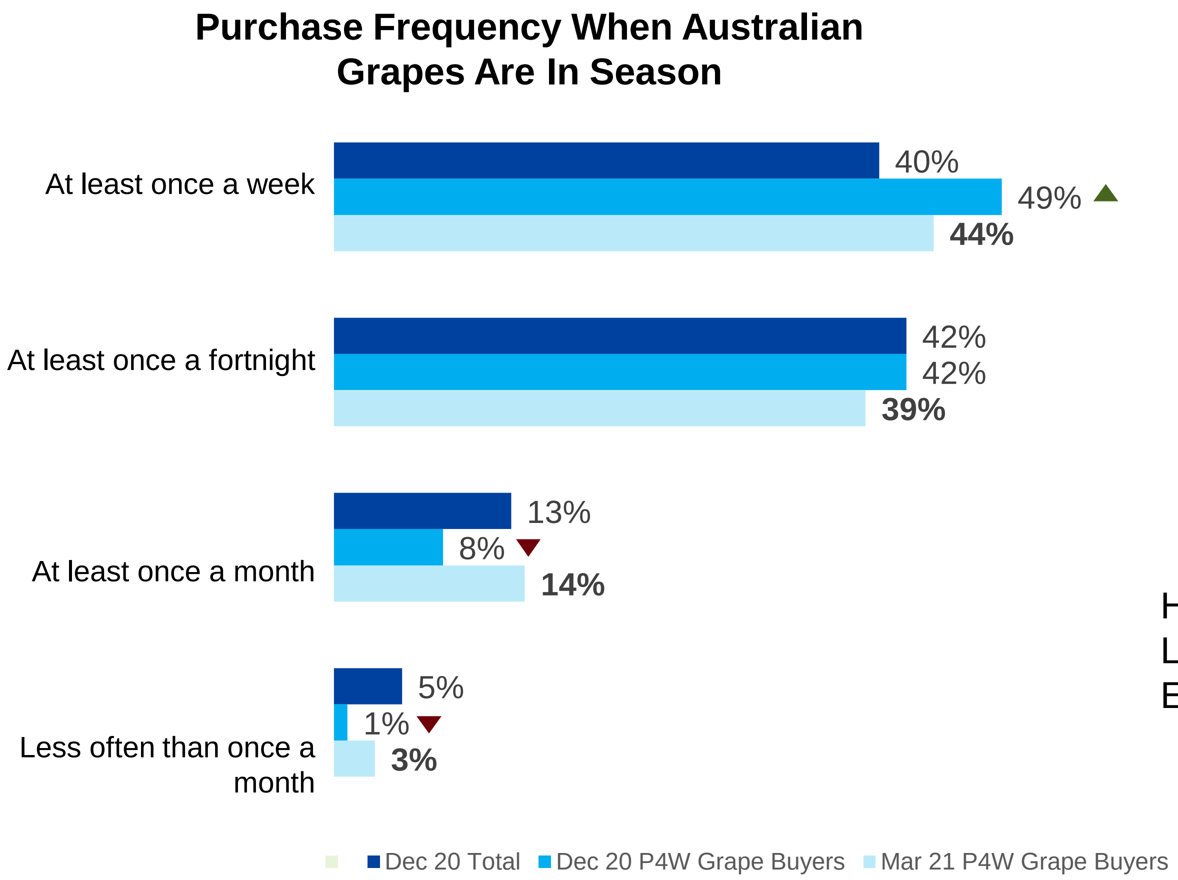


Q27. How do you prefer to buy Australian grapes? March 20201: Q27 How did you buy Australian grapes? [SA]
Q27a. Why do you prefer to buy/did you buy Australian grapes loose? [MA]
Q27b. Why do you prefer to buy/did you buy Australian grapes in pre-prepared plastic bags? [MA]

▲▼ Significantly higher/lower than December total
▲▼ Significantly higher/lower than the previous wave

Grapes are a frequent purchase

Perceptions of frequency of buying in the past 4 weeks has declined in March, when according to Homescan data it has remained relatively stable (1.3 occasions in March vs 1.2 in December). Potentially this is due to the steeper year on year decline in penetration, value and occasions.



Homescan: Latest 4 Weeks Ending **27/12/20**

Total Australia					
No. of Buying HHs (in 1000)		Avg. Purchase Val per Buying HH (in AUD)		Avg. Occs. per Buying HH	
Year Ago	Latest 4 Weeks	Year Ago	Latest 4 Weeks	Year Ago	Latest 4 Weeks
357.0	721.4	8.30	6.73	1.1	1.2

Homescan: Latest 4 Weeks Ending **21/03/21**

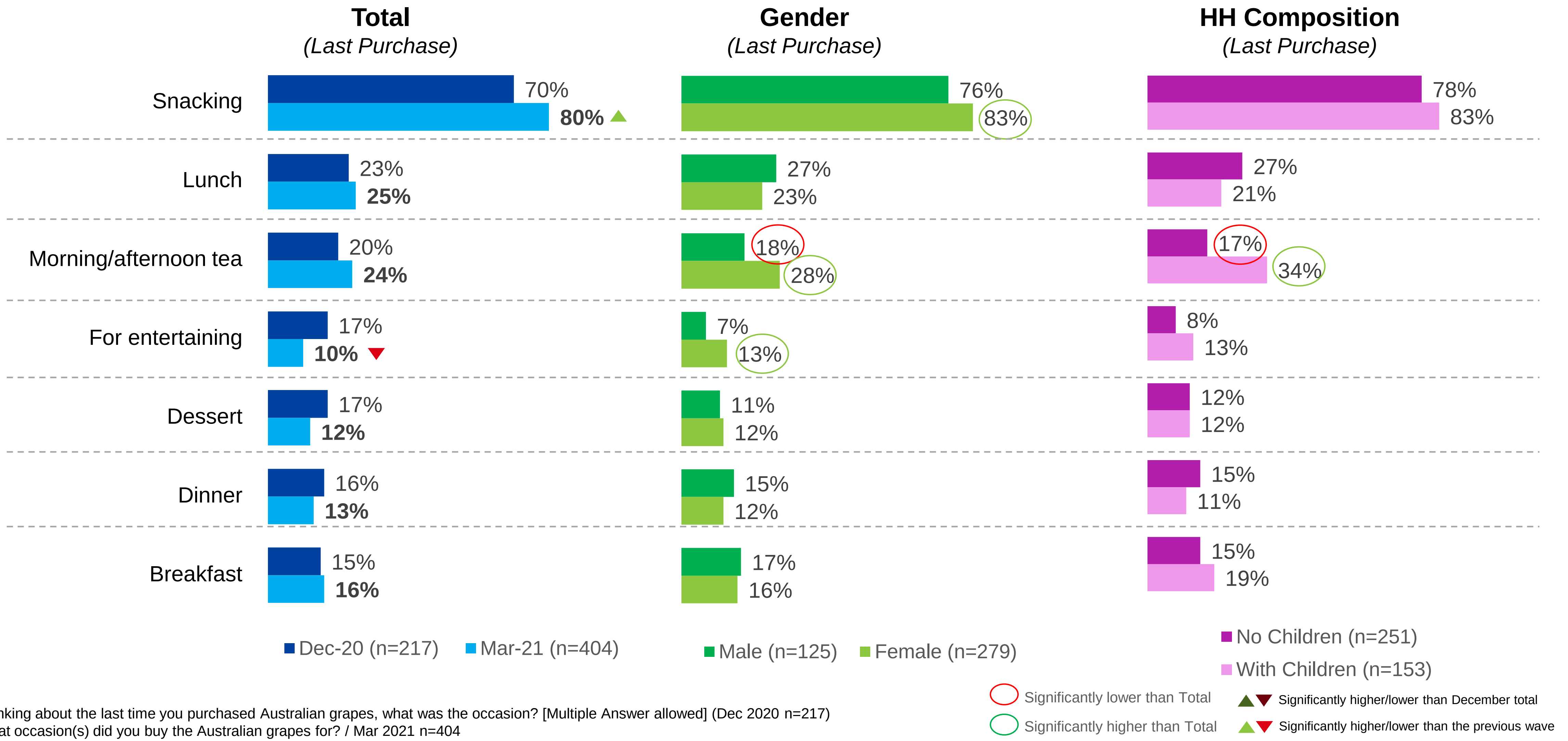
Total Australia					
No. of Buying HHs (in 1000)		Avg. Purchase Val per Buying HH (in AUD)		Avg. Occs. per Buying HH	
Year Ago	Latest 4 Weeks	Year Ago	Latest 4 Weeks	Year Ago	Latest 4 Weeks
1,517.1	1,091.0	6.68	5.25	1.5	1.3

Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q26. How often do you buy Australian grapes when they are in season? [SA]

▲▼ Significantly higher/lower than December total
▲▼ Significantly higher/lower than the previous wave

Snacking remained the key occasion grapes were bought for

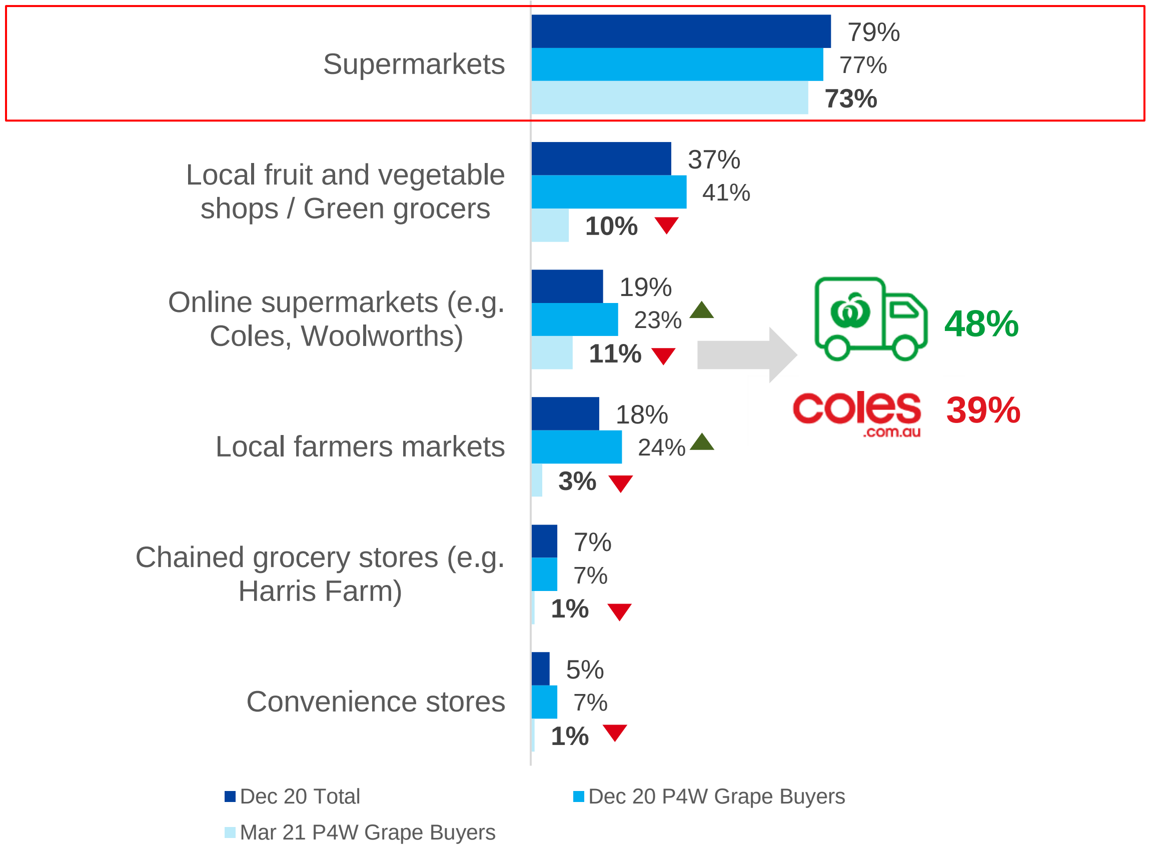
Snacking is now more likely to be the main occasion (80%) for consuming Australian grapes - with entertaining haven fallen back significantly by March.

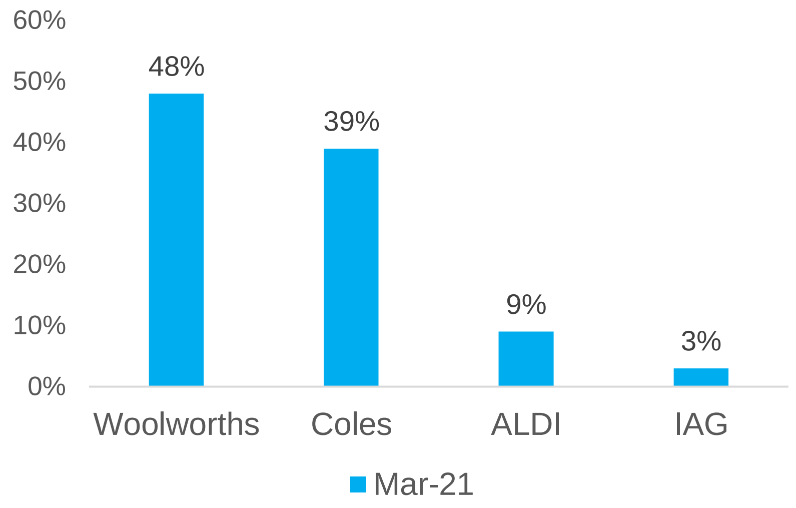


Q29. Thinking about the last time you purchased Australian grapes, what was the occasion? [Multiple Answer allowed] (Dec 2020 n=217)
Q12. What occasion(s) did you buy the Australian grapes for? / Mar 2021 n=404

Supermarkets remain the most popular channel to buy grapes

Woolworths is the most popular supermarket in both bricks and mortar and online channels. When comparing where shoppers usually buy grapes, to where they actually bought from on the last purchase, we have seen a notable drop in patronage of local green grocers, farmers markets and chained grocery stores.





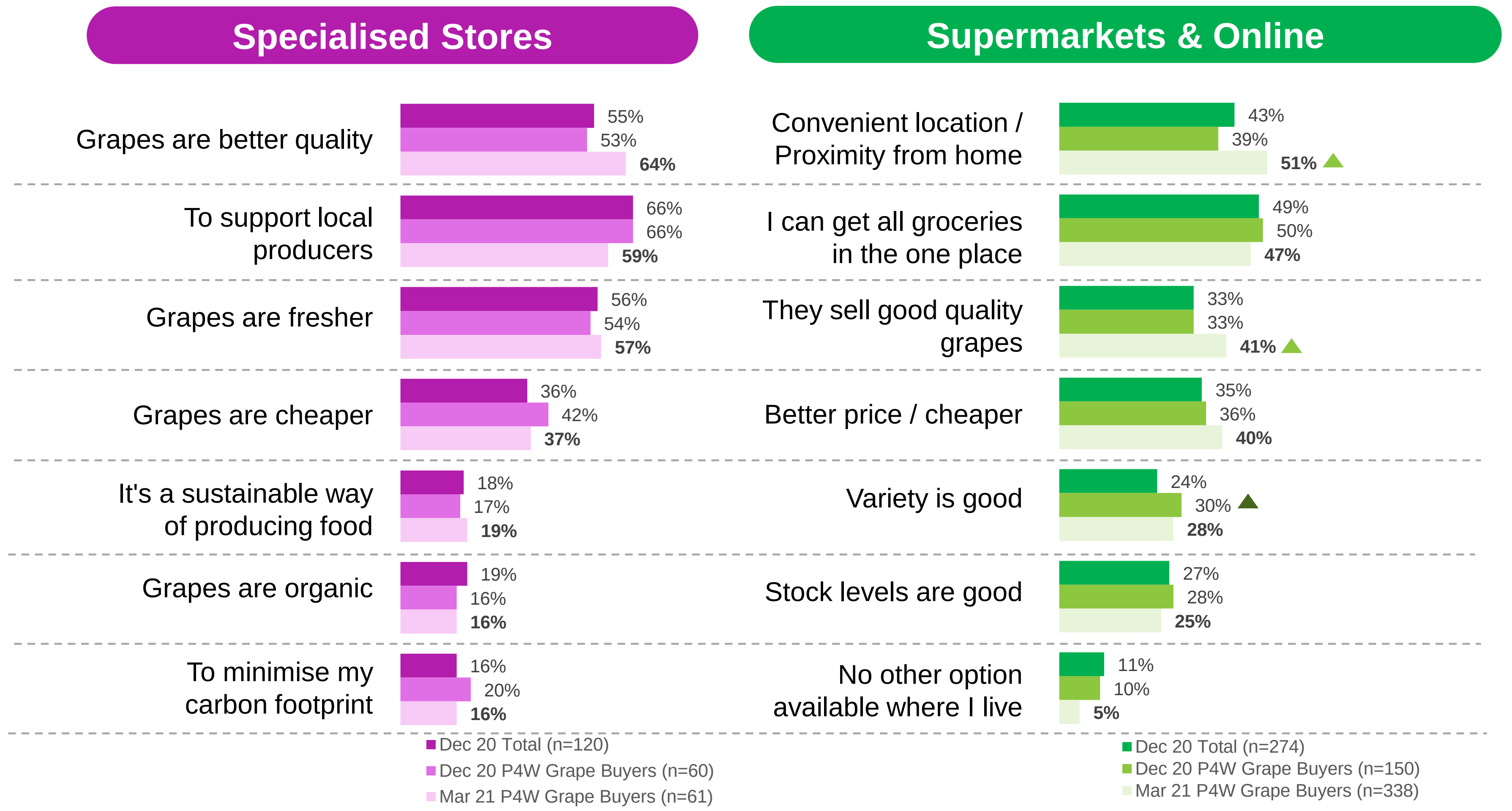
Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q18 Where do you usually buy Australian grapes from? [MA] Q18 Last time, where did you buy grapes from? [SA]
Q18a. Which supermarket did you buy AU grapes from n=293
Q18b. Which online supermarket did you buy AU grapes from n=45

Significantly higher/lower than December total
Significantly higher/lower than the previous wave

Convenience key in supermarkets but quality stands out in specialised stores

The quantitative survey confirmed that shoppers who prefer supermarkets & online channels value ‘convenience’ - as they can get all groceries in one go. However, those who prefer specialised stores seek fresher and better-quality grapes, while also helping to support local producers.

Reasons For Store Preferences

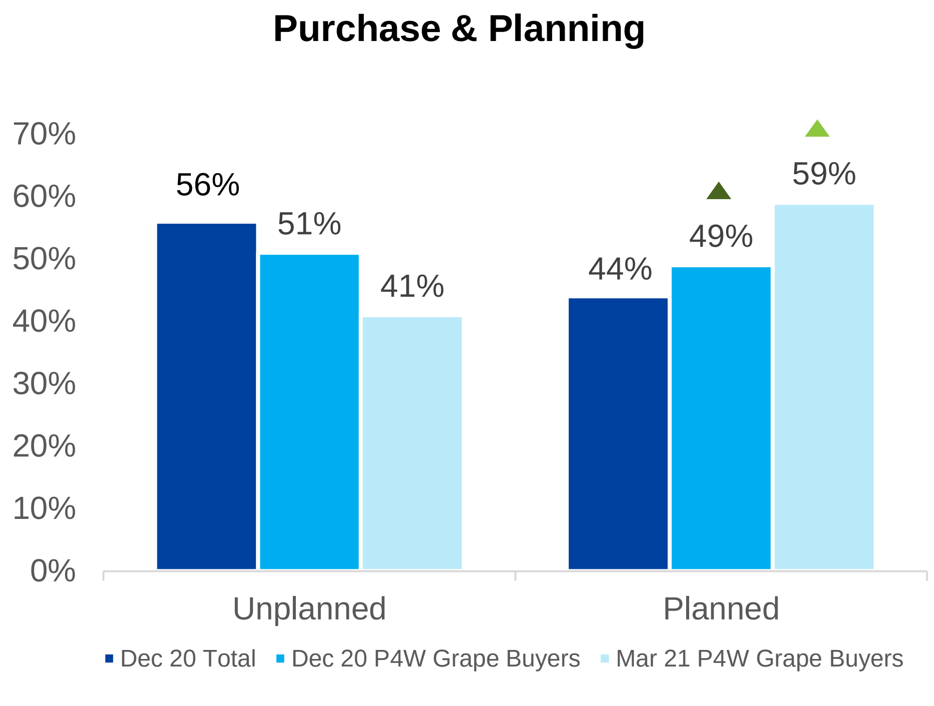


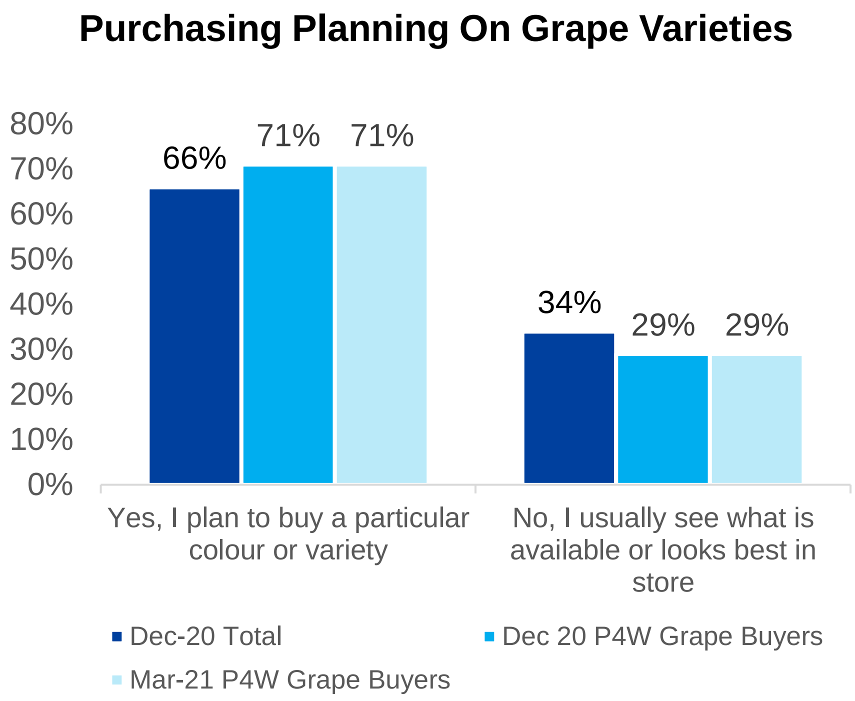
Q20. Why do you prefer to buy Australian grapes from <Supermarkets/Online supermarkets>? [MA]
Q21. Why do you prefer to buy Australian grapes from < Chained fruit and vegetable stores (e.g. Harris Farms)/ Local Farmers markets / Local fruit and vegetable shops / Green Grocers >? [MA]

▲▼ Significantly higher/lower than December total
▲▼ Significantly higher/lower than the previous wave

A mix of impulse and planned purchasing of grapes

However, planning, and more specific planning around colours and varieties, is now more prevalent among past 4 week buyers.





Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q22. Do you usually plan to buy grapes or only buy them when you see them in store? [SA]

Base: December Total (those who usually buy grapes for consumption) n=403; December P4W Grape Buyers n=217 / All respondents March 2021 P4W grape buyers n=404)
Q23. Do you usually have specific colour or variety (e.g. green grapes, red grapes, black grapes) in mind before your shopping trip? [SA]

Significantly higher/lower than December total

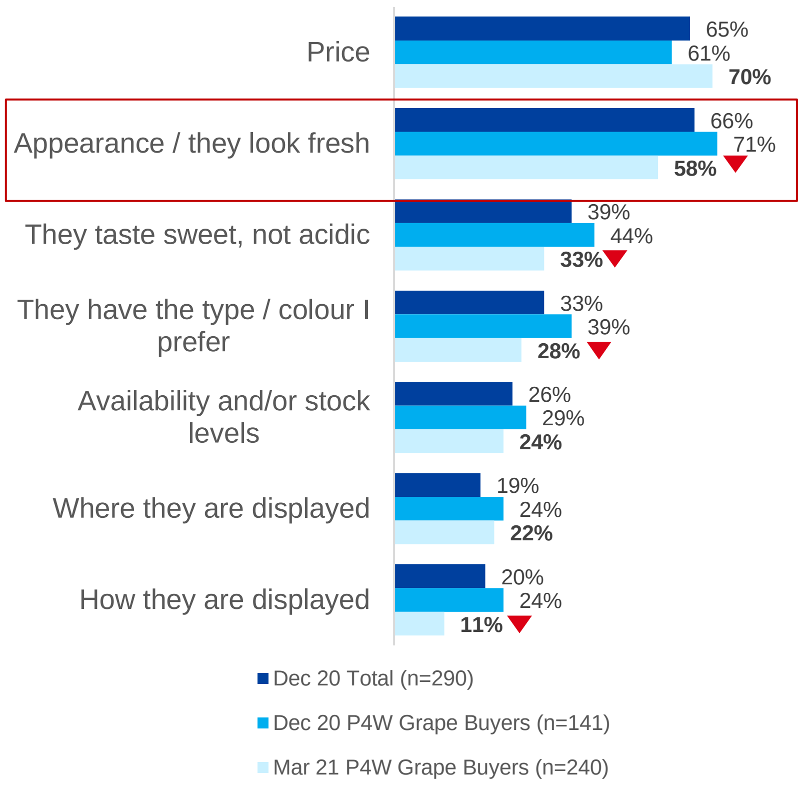
Significantly higher/lower than the previous wave

Point of sale key to driving sales

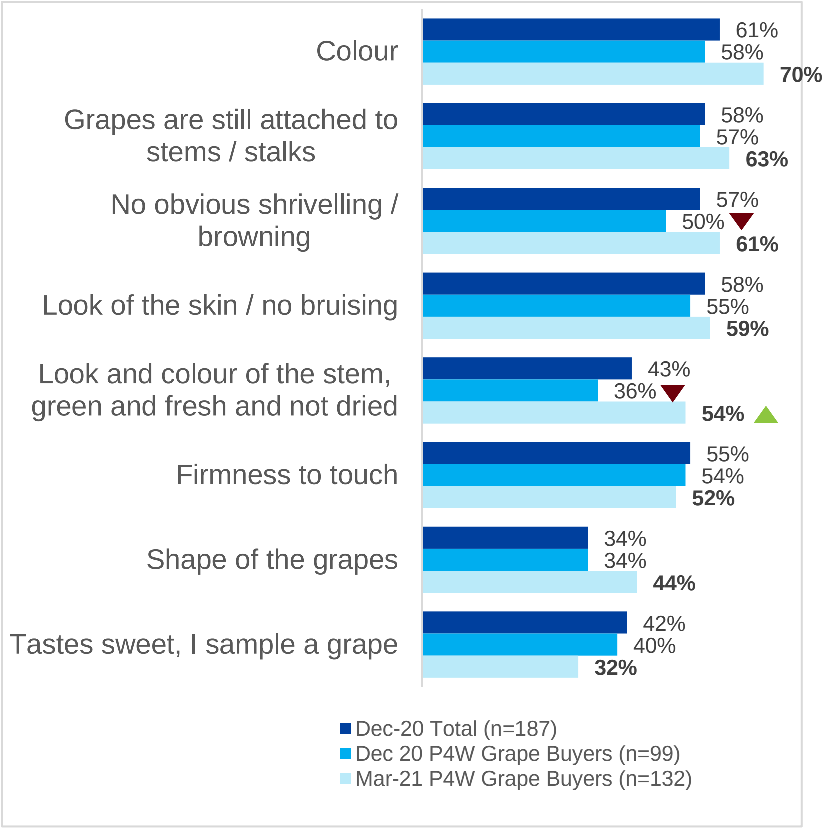
Price, now more so than 'Appearance' of grapes, is the most important factor that may encourage in-store purchasing. Appearance is still important with consumers usually determining the quality of grapes by looking at various factors such as colour, stalks, and skin appearance.

Among those who don't plan
OR
plan but usually make their decision in store

Prompts At Point-of-sale



How Consumers Determine 'Appearance'



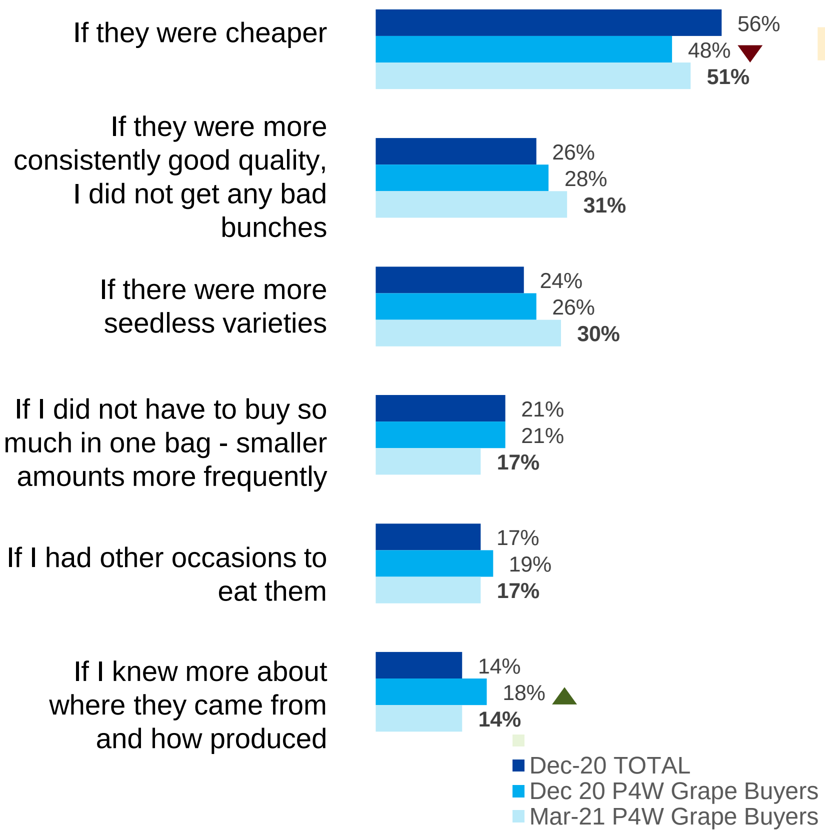
Q22. Do you usually plan to buy grapes or only buy them when you see them in store? [SA]
Q23. Do you usually have specific colour or variety (e.g. green grapes, red grapes, black grapes) in mind before your shopping trip? [SA]
Q24. What prompts you to buy Australian grapes when in store? [MA]
Q25. How do you decide whether the Australian grapes will be good quality by looking at their appearance when you are in store? [MA]

Significantly higher/lower than December total
Significantly higher/lower than the previous wave

Price key to encouraging more regular purchase

Half of shoppers also claimed that ‘improved affordability’ could potentially encourage them to consume Australian grapes on a more regular basis. However, households with children appear to be less price-sensitive and place slightly greater importance on grape quality.

FACTORS ENCOURAGING PURCHASE



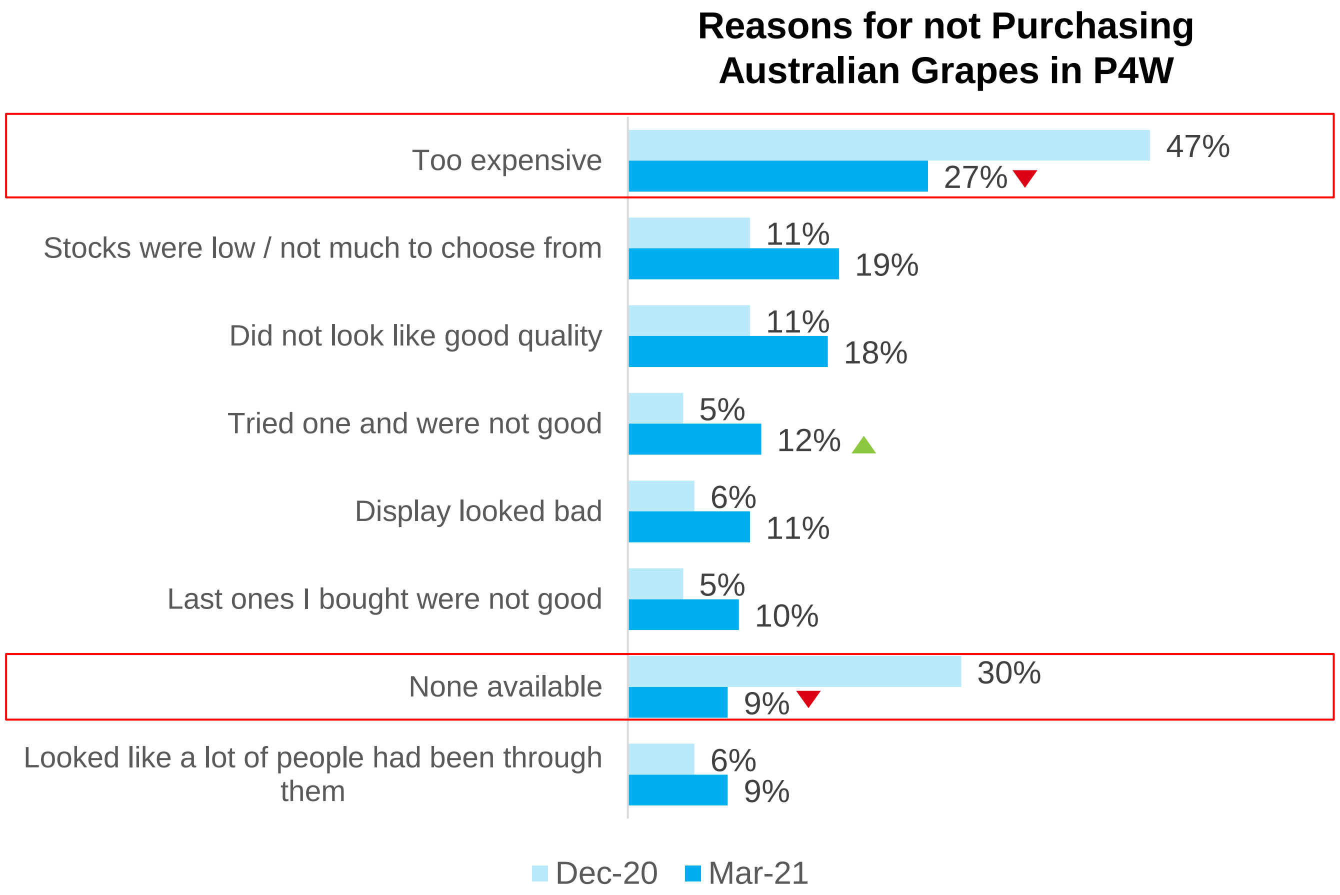
Monthly buyers 65%, Females (55%), Supermarket shoppers (53%)

Base: All respondents (December TOTAL N=403; December P4W Grape Buyers n=217 / March 2021 P4W grape buyers n=404)
Q26a What would make you purchase Australian grapes more often? [MA]

▲▼ Significantly higher/lower than December total
▲▼ Significantly higher/lower than the previous wave

At mid grapes season price remains a key barrier, although significantly reduced as prices fall

Availability is also no longer a key issue, although stock levels, quality and display are all more likely to be inhibiting factors.



Base: All respondents that did not buy grapes in the past 4 weeks (Dec n=168/Mar n=137)
Q38. Why have you not bought any Australian grapes in the past 4 weeks? [MA]

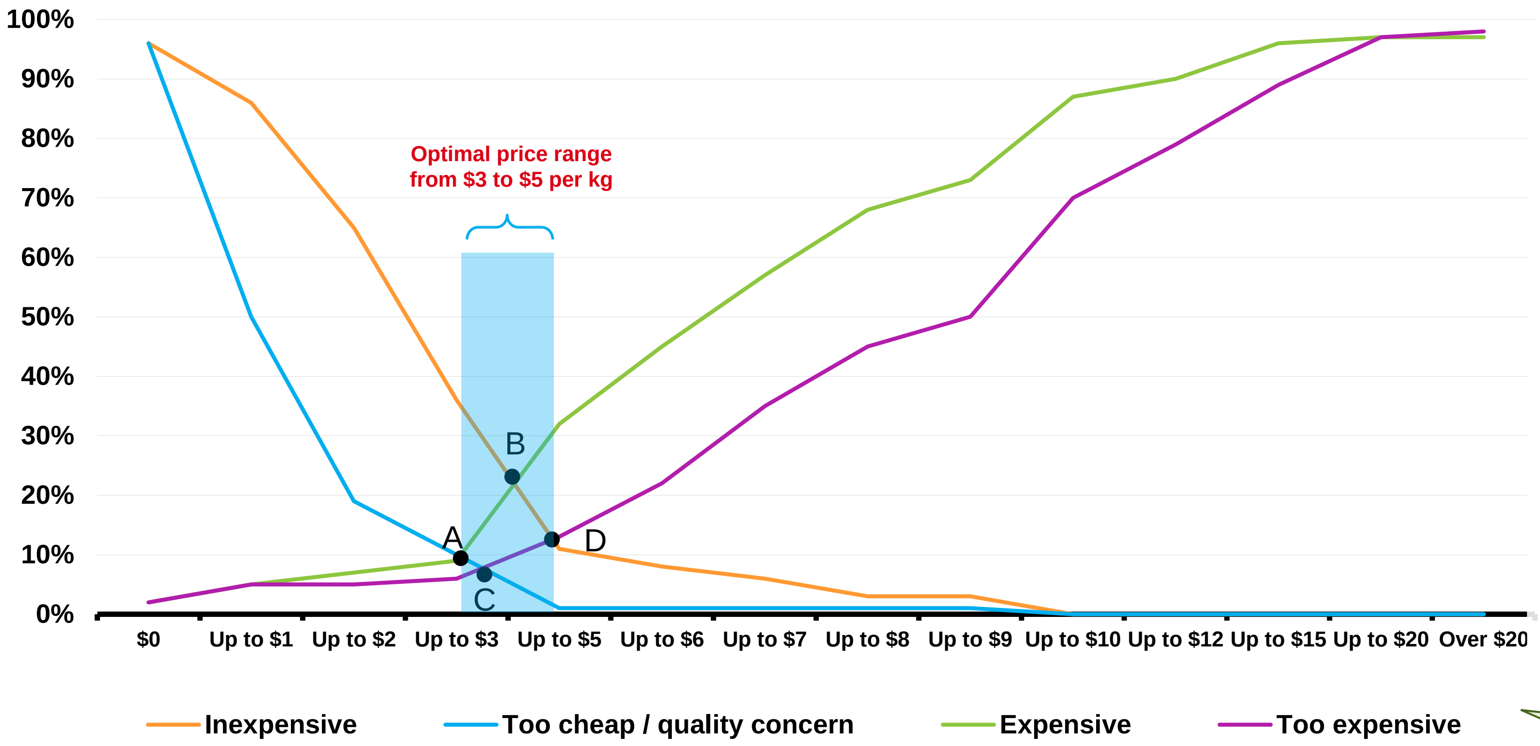
▲▼ Significantly higher/lower than December total
▲▼ Significantly higher/lower than the previous wave

Price Sensitivity Meter analysis backs up consumers strong preference for a more affordable product

From the qualitative research right through to this phase of the research, price has been a key trigger and barrier to increasing consumer purchasing. However, hitting a balance between producing a profitable product and increasing consumer demand is a reality to factor in.

"I usually try and keep it under the $7 mark, sometimes they're like $9.99 and $12.99 and that's just too expensive for a snack for the kids."

Range of acceptable prices for most respondents.
Within this range respondents have most trust in the quality of the product, which is sold at the consumer acceptable price.



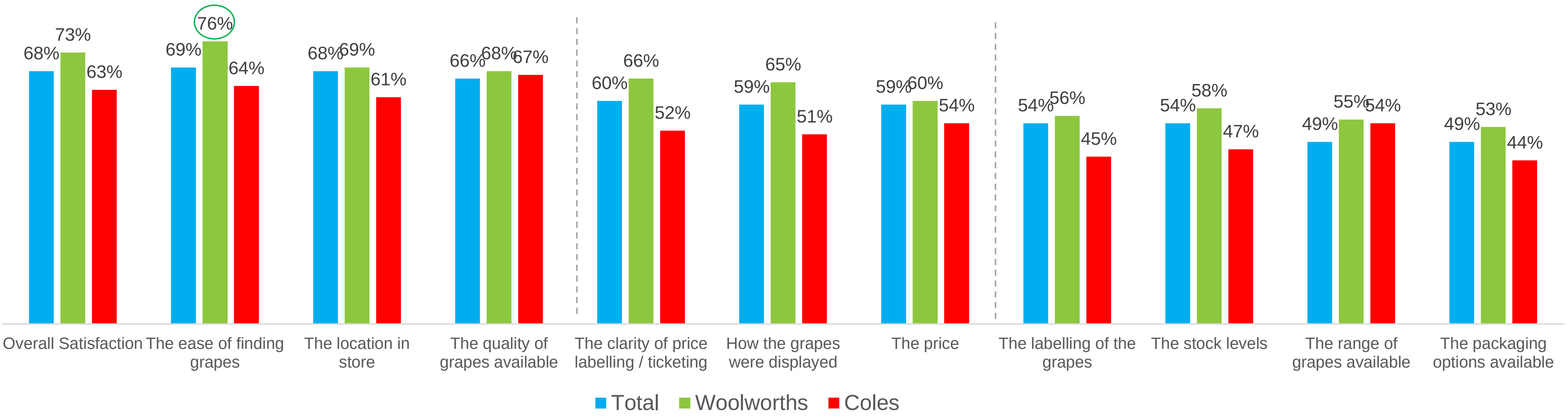
A	**Point of marginal cheapness (PMC)** - Extremely low price, the service with lower price will be considered as of low quality	**A=$3**
B	**Point of indifference (IPP)** - at this price the minimal share of respondents declined the service because of the price (too low or to high)	**B=$4**
C	**Point of optimal price (OPP) recommended** - This price is acceptable for the majority of the respondents	**C=$3.99**
D	**Point of marginal expensiveness (PME)** – extremely high price	**D=$5**

"When I think about it, I normally spend just over $100 on groceries a week, that's 10% of the budget gone in just grapes."

Base: All respondents, n=404
QPRICE. Thinking about the price of Australian Grapes, please type in the price of grape - Summary

Grape buyers are generally satisfied with their experience, particularly location, and hence, ease of finding grapes and the quality

Woolworths shoppers are generally more satisfied than Coles shoppers, significantly more so for ease of finding grapes in store.

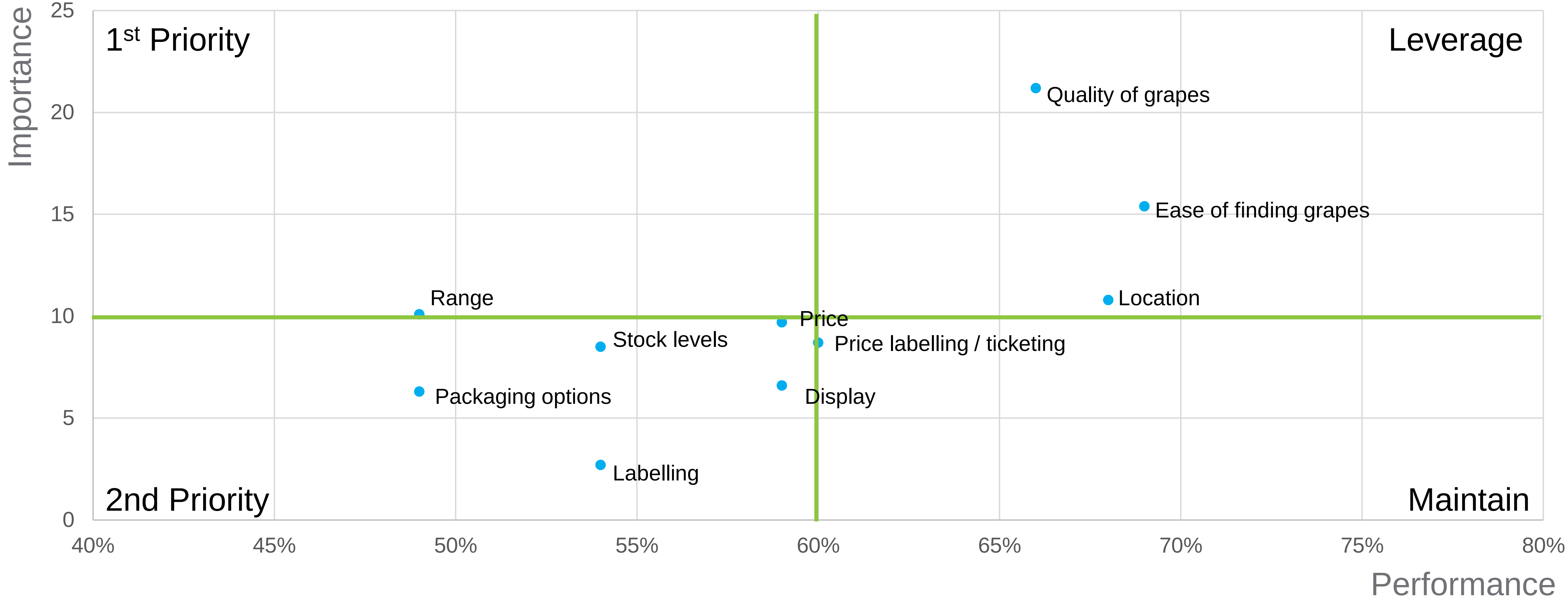


Base: All respondents (March 2021 P4W grape buyers n=404; Woolworths shoppers n=146; Coles shoppers n=103)
QRSAT. Satisfaction with buying grapes on this last occasion – SA
QOSAT. Overall satisfaction with buying grapes on this last occasion

Significantly lower than Total
Significantly higher than Total

Leverage quality, ease of finding and location

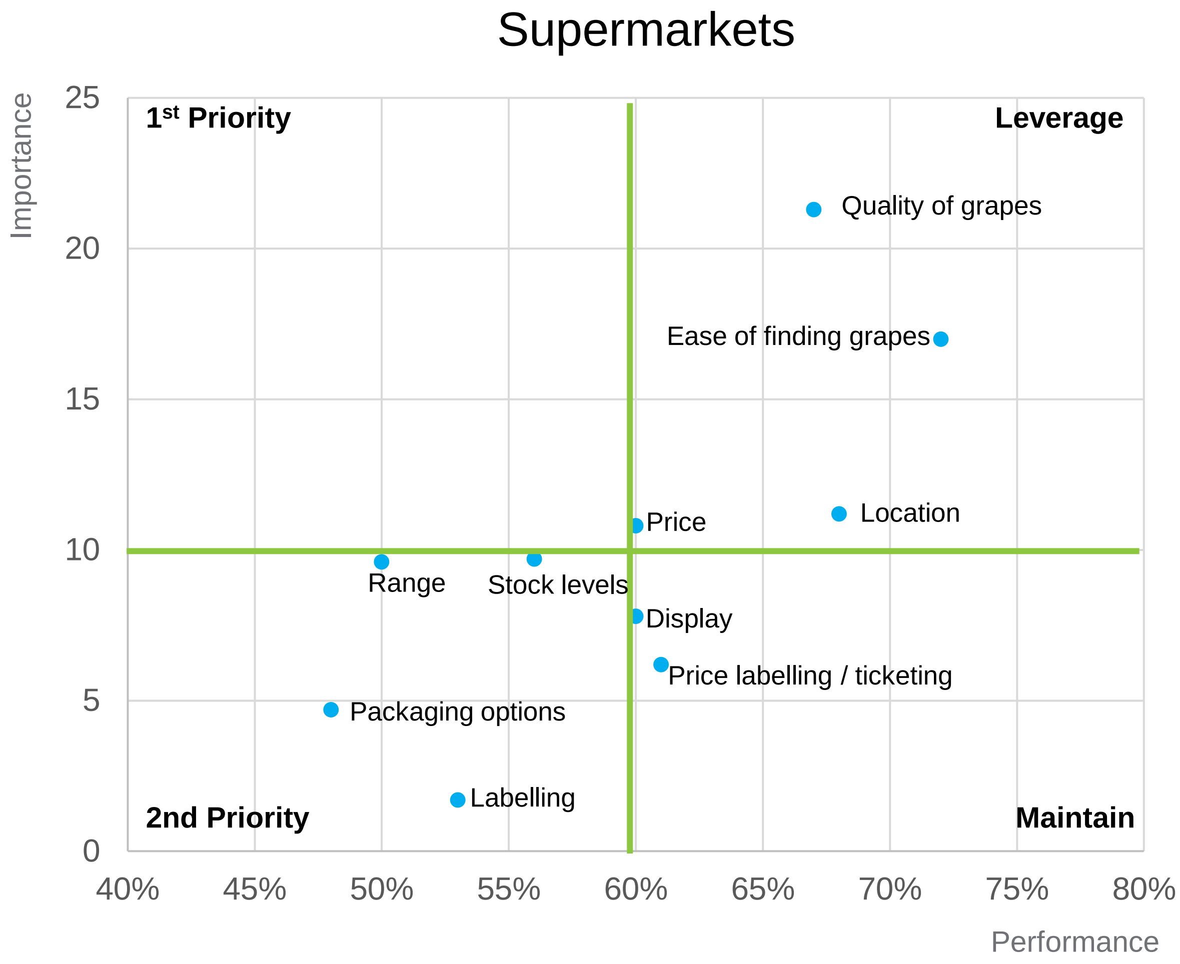
Look to address range, stock levels and price

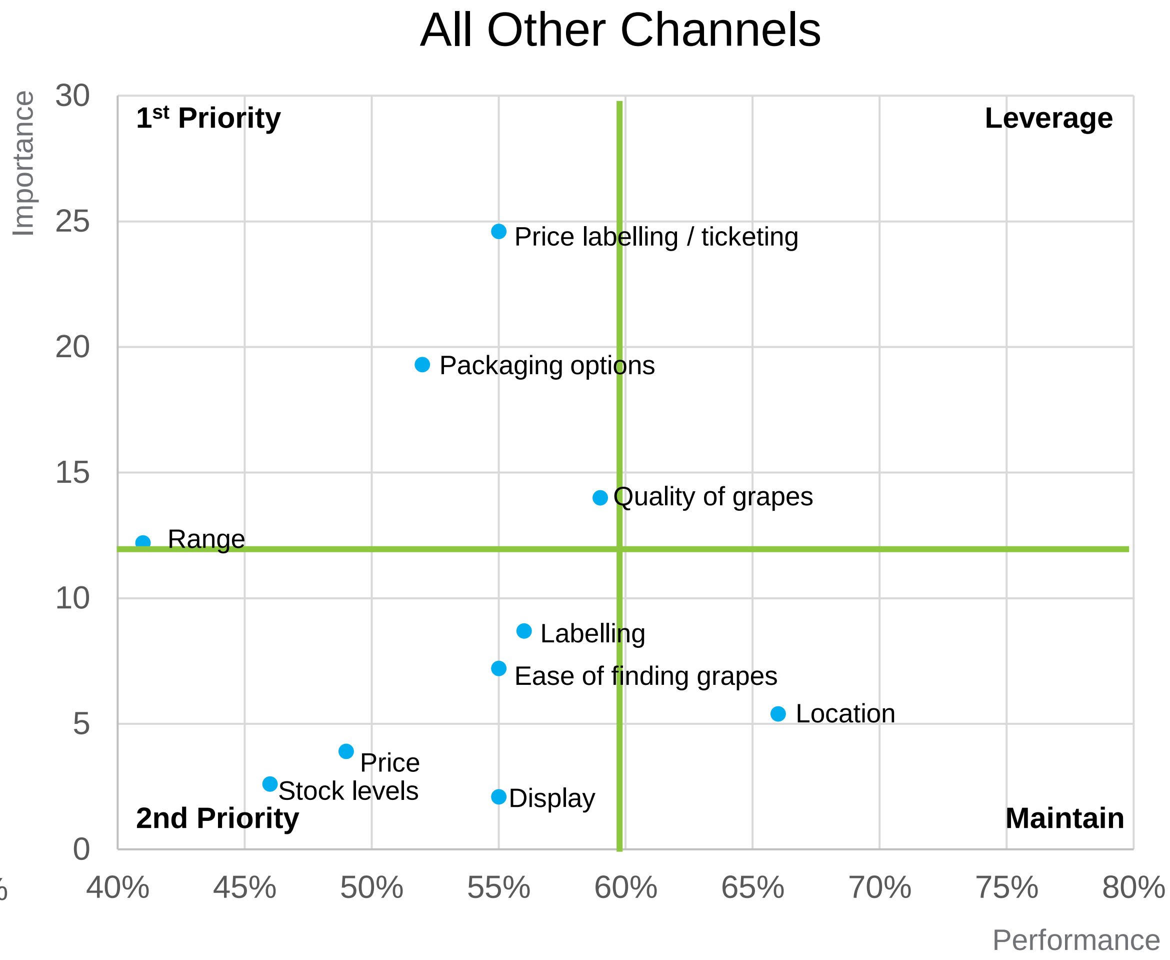


Base: All respondents (March 2021 P4W grape buyers n=404)
QRSAT. Satisfaction with buying grapes on this last occasion – SA
QOSAT. Overall satisfaction with buying grapes on this last occasion

Supermarkets need to focus on price, range and stock, whereas ticketing and packaging are issues in other channels

All channels doing a relatively good job on in-store locations

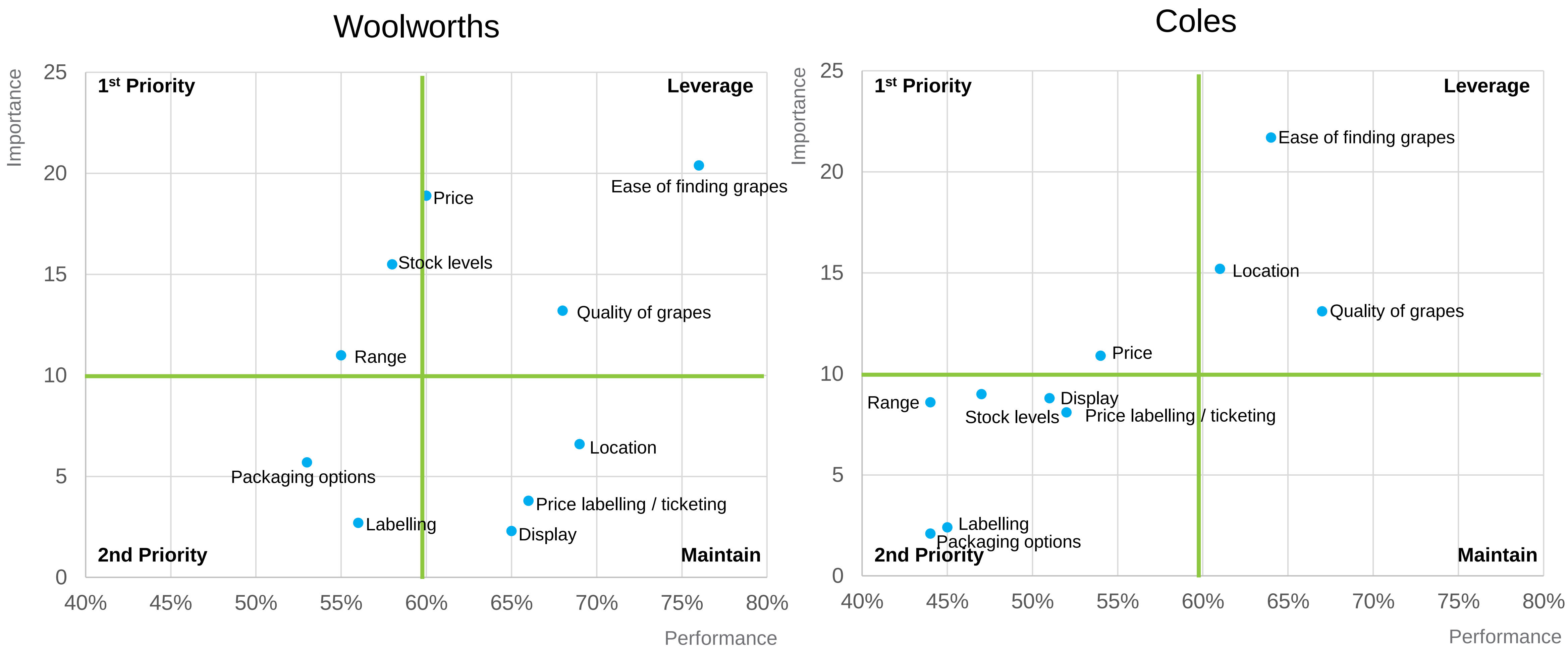




Base: All respondents (March 2021 P4W grape buyers n=404)
QRSAT. Satisfaction with buying grapes on this last occasion – SA
QOSAT. Overall satisfaction with buying grapes on this last occasion

Woolworths and Coles need to focus on price, stock and range

Additionally, Coles need to review displays and price ticketing to improve



Base: All respondents (March 2021 P4W grape buyers n=404)
QRSAT. Satisfaction with buying grapes on this last occasion – SA
QOSAT. Overall satisfaction with buying grapes on this last occasion

RECOMMENDATIONS

This seasonal deep dive focused on the recent path to purchase

- All respondents had purchased grapes in the past 4 weeks. There was also substantial cross purchasing of other fruits during this time, reiterating the substitution threat to grapes if the point of sale is not optimised. Dial up key benefits of a convenient, long lasting snack option, to negate threats.
- There remains an opportunity to educate shoppers about the different varietals as well as consumption occasions to increase grape buying frequency.
- Supermarkets are the main channel for regular, routine purchasing of grapes. Other channels appear to be used more sporadically, hence the focus should be on working with the majors, Coles and Woolworths.
- While there remains an important role for growers to produce a superior grape, some focus should also be put towards benchmarking the costs of production across the industry. However, it is noted that a balance between optimal consumer pricing and grower profitability needs to be achieved.
- Retailers too need to focus on prices charged as this is key to driving sales, being a key factor in encouraging more frequent purchasing as well as being the biggest barrier to sales at all.
- Interestingly, at mid grape season, prices were significantly reduced from December 2020 and the consumer focus on quality/taste also reduced. This may well indicate that the value equation is now more balanced and/or that a more consistent quality product is hitting the shelves.
- Most shoppers were satisfied with the past 4 week shopping experience, mainly as the quality of grapes bought and findability in store was good.
- Supermarkets need to improve pricing, stock levels and range to improve the shopper experience. Coles additionally were seen to be requiring better displays and ticketing to improve the shopper experience.

NEXT STEPS

HOMESCAN QUALITY PERFORMANCE TRACKER – Next Wave **Nov/Dec 2021**

SEASONAL DEEP DIVE – Next Wave **March 2022**

THANK YOU