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Hort Innovation

Introducing the Domestic Growth Framework

Australian Market Report October 2022

Hort Innovation

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Key Insights

6 Needs Pillars Drive All Consumption Choices

Taste and Convenience Are Table-stakes Meal Occasion has the next Biggest Influence on Choice

Advantages can Drive Growth in 'Heartland' Territories Poor Quality is the Biggest Barrier to Growth

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

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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 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

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

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- 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 (NeedScope¹)

Outcomes from Phase 3:

- Demand Space Model that maps all commodities, identifying 'Where-to-Play' and 'How-to Win'.
- NeedScope¹ 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

Qualitative

- 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

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



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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 <u>Australian</u> 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



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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

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.

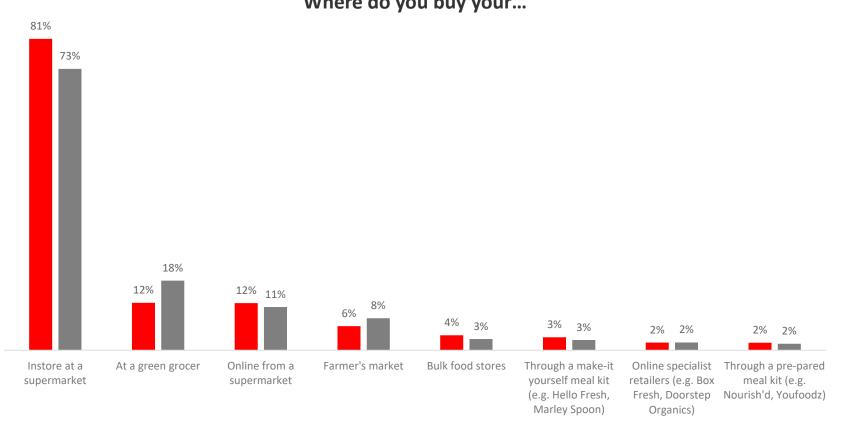
"We have standards items that we get every time, and supplement that with what's on special or best in season, as long as they fit in with what I usually cook." Female, Family

DAIRY

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Groceries are overwhelmingly purchased in store at a supermarket

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



Where do you buy your...

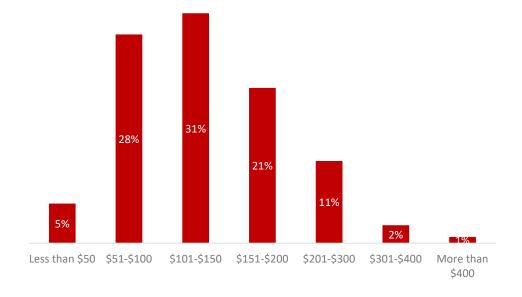




Over half of consumers are spending between \$100-\$200 a week on groceries

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?





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



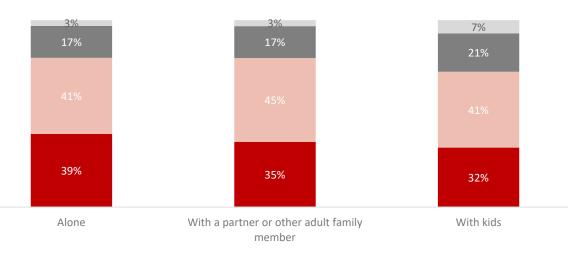


Consumers like to use a list, although they are open to spontaneous purchases

Attitudes towards new and different items differ across the consumer base

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



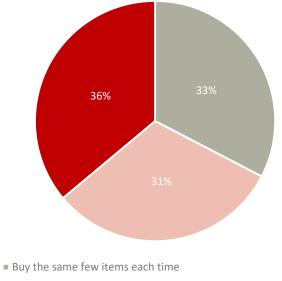


I decided what to buy spontaneously

■ I had a rough idea of what I would be buying beforehand

I had a shopping list but I also made spontaneous purchases

■ I knew exactly what I would be buying beforehand / I shopped from a shopping list



- Often buy a variety of new / different things
- Mostly buy the same items but try a few new/different things



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N=4,002

Source: Kantar HIA Domestic Growth Study 2022

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

50%

The price of the produce Australian grown 43% In season 37% Produce that looks appealing (fresh, ripe etc) 33% On special 32% Produce that I know my household will like/eat 31% Staple items that I always buy 26% Locally grown 24% Produce I know how to prepare 20% Convenient to prepare/eat 19% Produce for specific recipes/meal plans 18% Has the nutrition my mind/body needs 18% The style of cuisine I like to cook 13% No or limited plastic packaging 12% Organic 8% Produce that is new and different 4% Appealing packaging 3%

ΚΔΝΤΔΡ

When shopping for fresh produce what determines your choice?

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

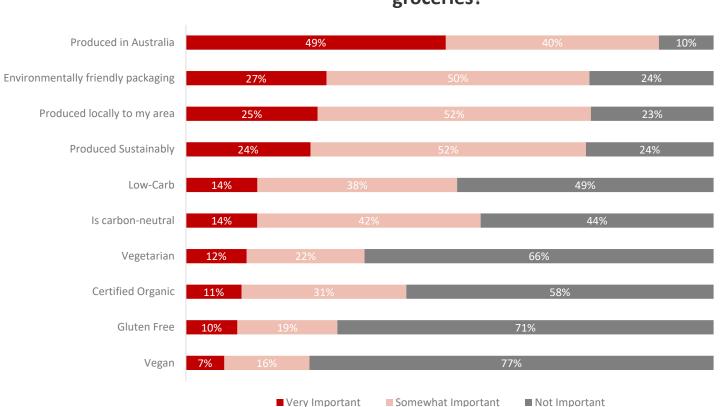




N=4,002 Source: Kantar HIA Domestic Growth Study 2022

Locality and sustainability are what consumers are looking for from groceries

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



How important are the following when purchasing groceries?





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.

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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?





What We Used...

What We Did...

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

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

• 6 Needs Pillars

What We Got...

• 5 Meal Occasions







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

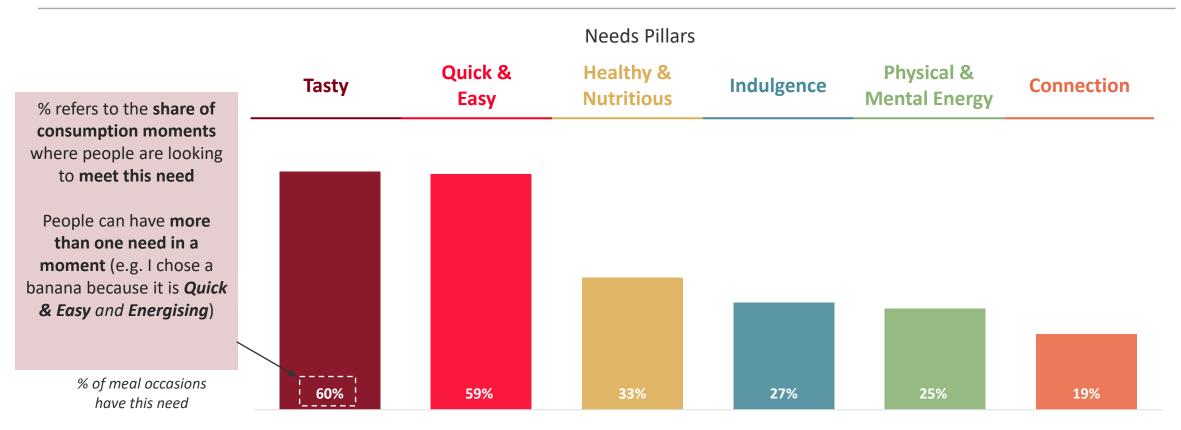






Needs Pillars

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

KANTAR Source: Kantar HIA Domestic Growth Study 2022

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







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



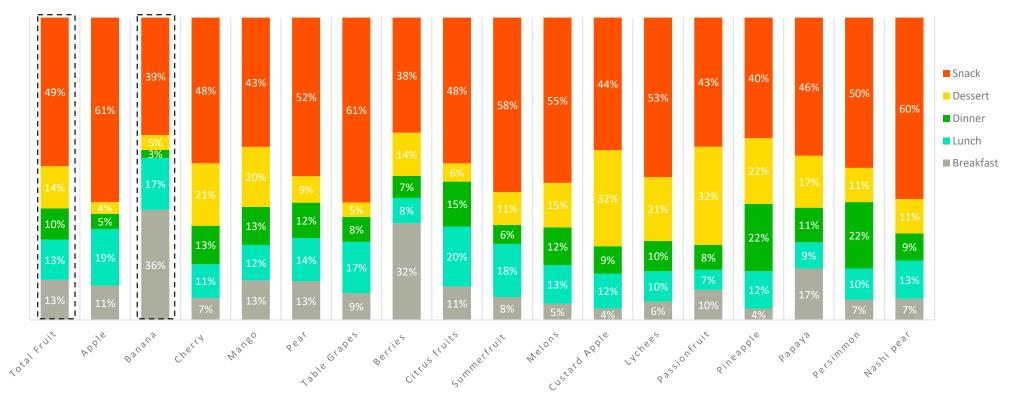
Breakfast	Morning meal
Lunch	Mid-day meal
Dinner	Evening meal
Dessert	Post-dinner
Snacks	Between meals





Fruit by consumption occasion

Breakfast Occasions are 36% of Banana occasions, which is an over-representation vs 13% for All Fruit. Snacks are 39% of all Banana occasions, an under-representation vs 49% for All Fruit.



Occasion Share of Sub-Category



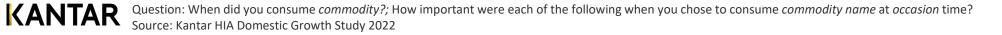
N=4,940 Question: When did you consume *commodity name?* Source: Kantar HIA Domestic Growth Study 2022



Demand Spaces

Demand Space Framework





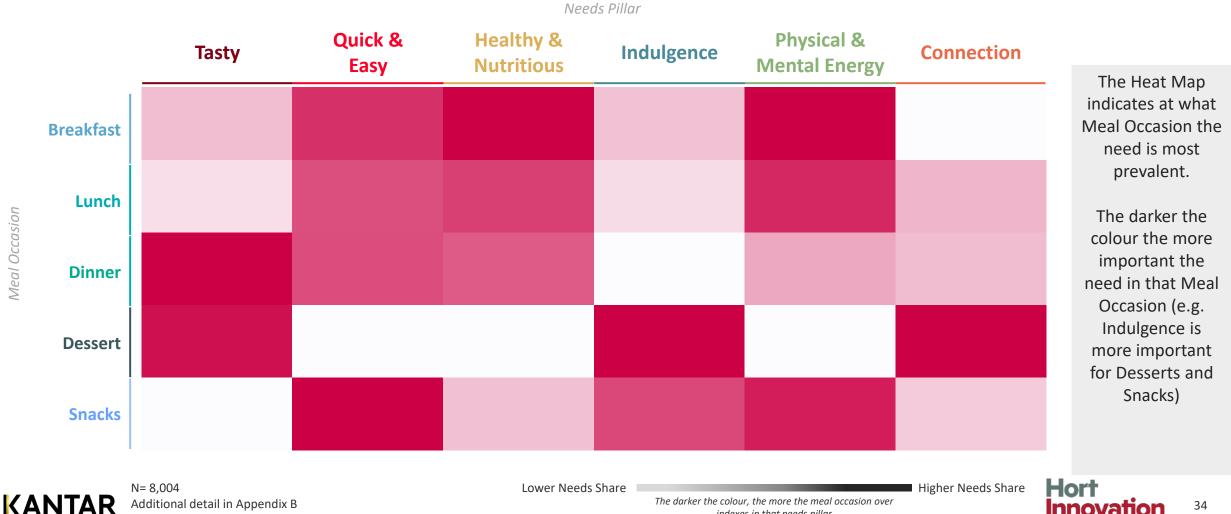


Demand Spaces

Additional detail in Appendix B

Source: Kantar HIA Domestic Growth Study 2022

The Needs Pillars vary in importance across Meal Occasions



The darker the colour, the more the meal occasion over

indexes in that needs pillar

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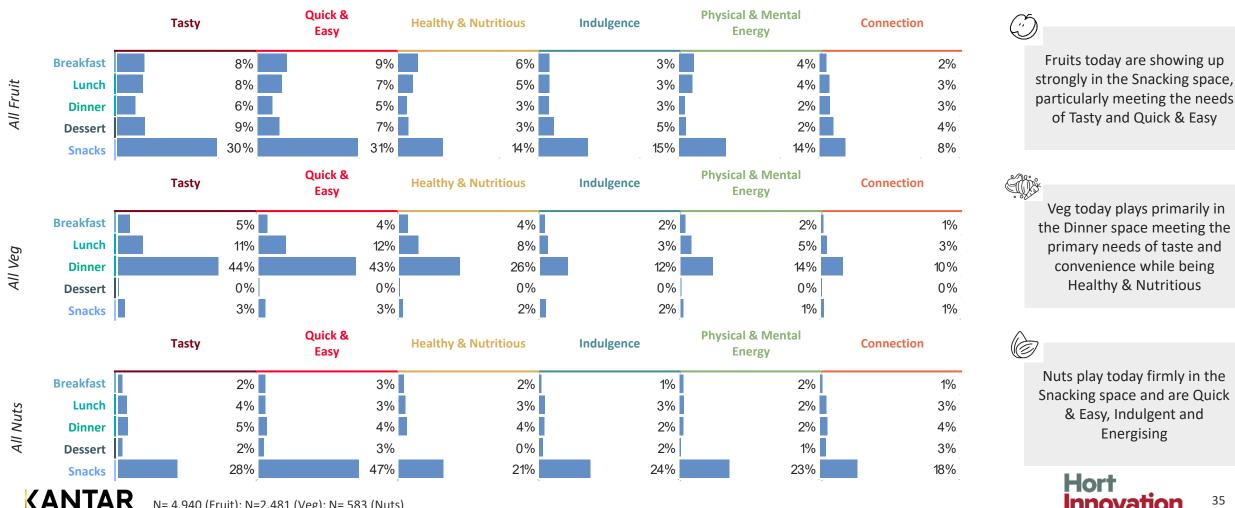
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Demand Space Framework

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

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Innovan



N= 4,940 (Fruit); N=2,481 (Veg); N= 583 (Nuts)

Source: Kantar HIA Domestic Growth Study 2022

6. Banana 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



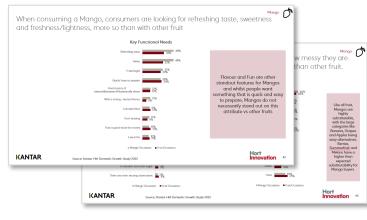


Content for Each Commodity

What's included for each commodity?

<text>

Drivers/Barriers/Substitutes



Light v Heavy Consumers

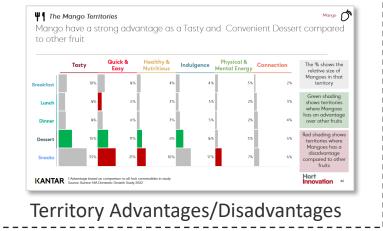
Fruit Usage Frequent and Infrequent Mana

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

Infrequent Mango consumers tend slightly towards Quick & Easy and Snacks, yet still have plenty of room for Tasty and Indulgence.



Where to Play



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Mango Advantages

Below are the key territories in which Mango has an advantage over <u>other</u> Fruit. The competitors are those for which these territories are also prevalent. Highlighted attributes are those in which Mango over-index.

	Tasty	Indulgent	Dessert	
Key Needs (key ant/or ow-inter occurs need-compositing Margo strengths are hydrighter)	Really Tasty Refreshing Everyone will eat	Satisfy a craving Treat/Indulgence Relax & unwind Nostalgic/Comforting	Really Tasty Refreshing Treat/Indulgence Good for Sharing	
Key Competitors (tentory of equivalant size within cotegory occession)	Melons Grapes Berries	Summerfruit Grapes Berries	Melons Berries Summerfruit	
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How to Win

Mango

Mango **Competitive Review** Benefits Barriers Refreshing, Sweet, Light, Intense Flavour, Fun Expensive, Messy, Bruises Easily Mango Melon Refreshing, Sweet, Light Expensive Poor Quality Goes off tor quickly, Messy, More quantity than typically Need Refreshing, Sweet, Light, Consumer on Expensive, Poor Quality Grapes Berries Quick & Easy, Refreshing, Sweet, Light, Expensive, Goes off too quickly, Poo Quality Summer Refreshing Light Quick & Easy Sweet Expensive Goes off too quickly Poo Consume on the Go Quality, State of Ripeness in store, bruis -fruit easily. Messy Refreshing, Quick & Easy, Light, Sweet, Bruises Easily, Poor Quality, More Excitin Apple Banana Quick & Easy, Filling, Consume on the Goes off too quickly, Bruises Easily, S of Ripeness in store Hort KANTAR



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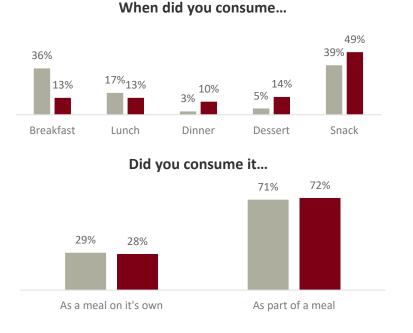
Mango 🔊

Banana

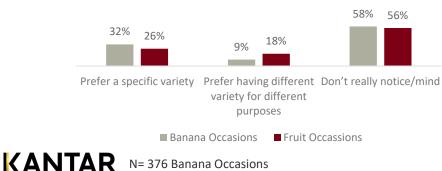




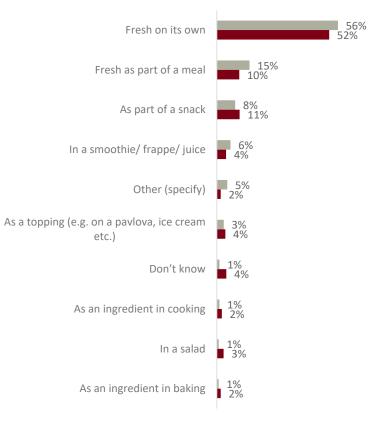
Banana occasions are similar to all Fruit occasions, except for a skew towards breakfast and are more likely to be eaten fresh on their own or as part of a meal.



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



Source: Kantar HIA Domestic Growth Study 2022



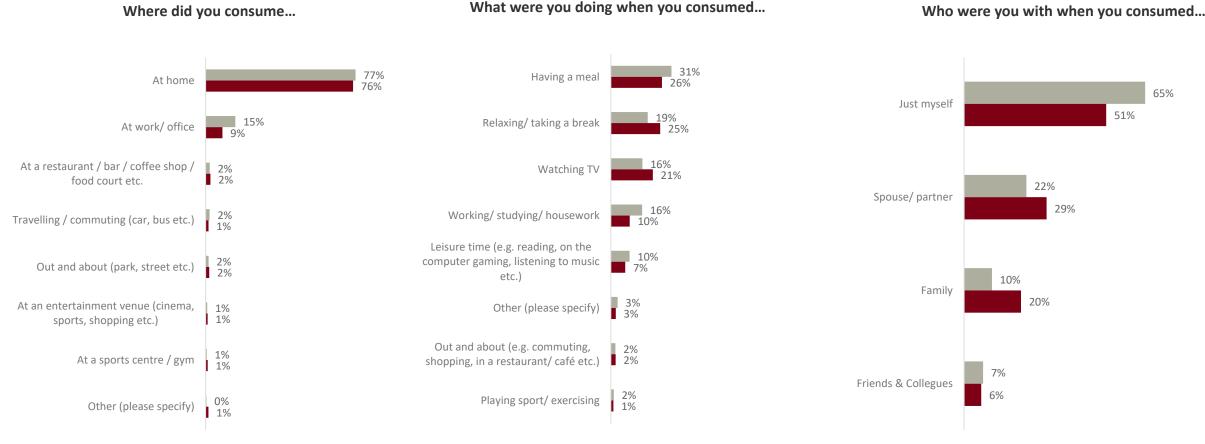
How did you eat...

■ Banana Occasions ■ Fruit Occassions



Banana 🦯

Fruit is mostly consumed at Home, Bananas similar to all fruit. People eat Bananas when they're having a meal or during downtime like watching TV or relaxing.

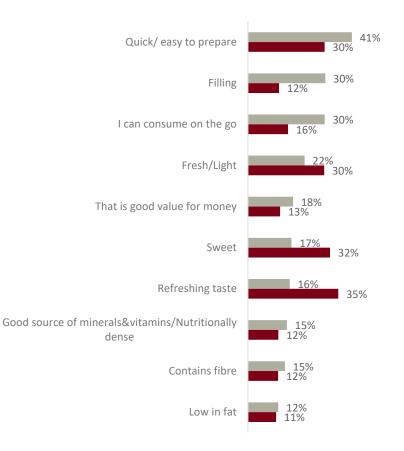


■ Banana Occasions ■ Fruit Occassions



Banana

KANTAR N= 376 Banana Occasions Source: Kantar HIA Domestic Growth Study 2022 لے When consuming a Banana, consumers are looking for a filling on the go fruit that is easy to prepare, more so than with other fruit.



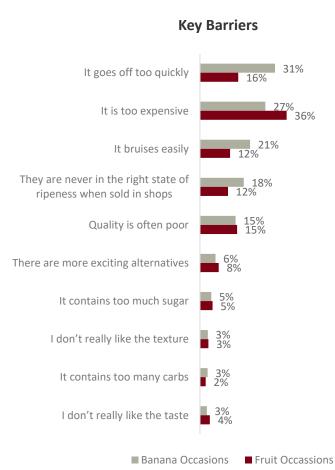
Key Functional Needs

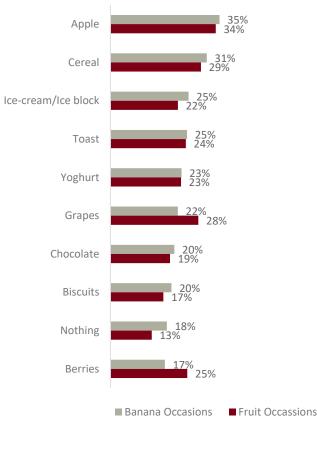
On the go convenience and good value are standout features for Bananas. Freshness/sweetness do not necessarily stand out for Bananas vs other fruits

■ Banana Occasions ■ Fruit Occassions



KANTAR N= 376 Banana Occasions Question: What were you looking for when you consumed *commodity name*? Source: Kantar HIA Domestic Growth Study 2022 The most significant barriers for Bananas are how quickly they expire and bruising. They are also challenged by ripeness and quality, often more so than other fruit.





Like all fruit, Bananas are highly substitutable, with the large categories like Apples, Grapes & Berries being easy alternatives. Given bananas prevalence at breakfast time a number of breakfast foods are expected substitutes for Banana buyers.

Banana //

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R N= 376 Banana Occasions Questions: What are the reasons you may not choose *commodity name?*; What else would you typically consider having if *commodity* wasn't available Source: Kantar HIA Domestic Growth Study 2022

Key Substitutes

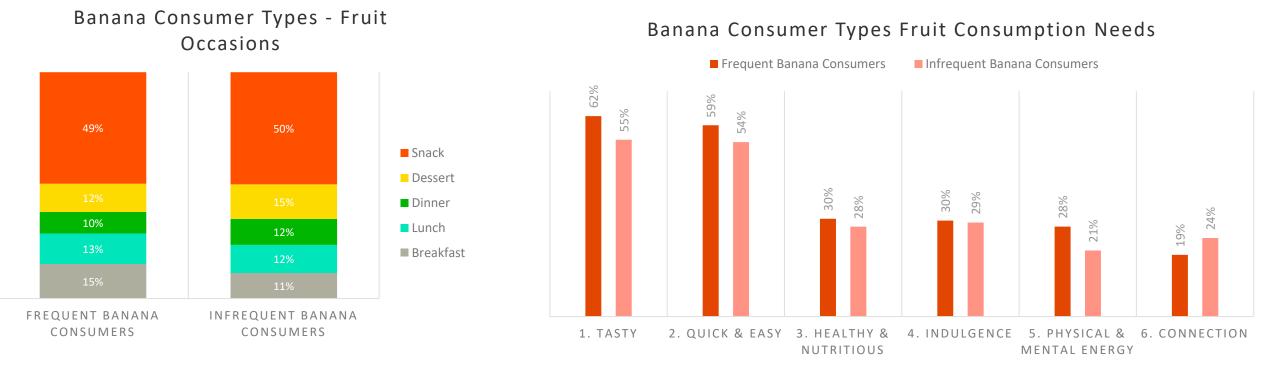
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Hor

Banana Usage

Frequent and Infrequent Banana consumers share the same Fruit consumption occasions and have very similar consumption needs.

Infrequent Banana consumers tend slightly towards Connection and Dessert, and Frequent consumers tend slightly more towards Tasty



N= 3689 Frequent Banana Consumers; N= 1098 Infrequent Banana Consumers

KANTAR 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



Banana

The Banana Territories

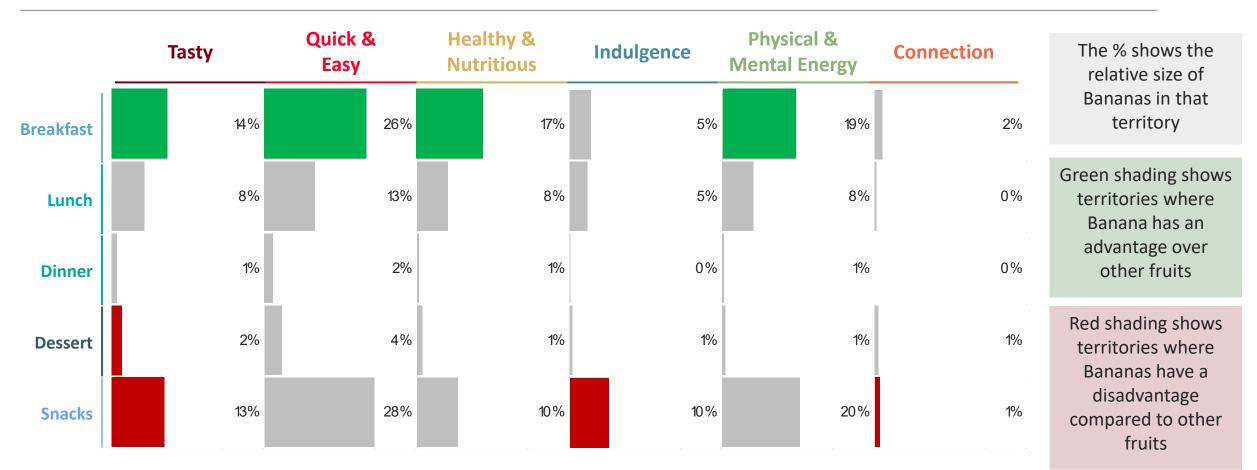
Banana

Hort

Innovati

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Bananas have a strong advantage in breakfast particularly in the Quick & Easy and Physical & Mental Energy needs pillars with room to grow in snacks and lunch



N= 376 Banana Occasions 1 Advantage based on comparison to all fruit commodities in study Source: Kantar HIA Domestic Growth Study 2022

Banana Advantages

Below are the key territories in which Bananas have an advantage over other Fruit. The competitors are those for which these territories are also prevalent. Highlighted attributes are those in which Bananas over-index.

	Quick & Easy	Physical & Mental Energy	Breakfast
Key Needs (large and/or over-index occasion needs, corresponding Banana strengths are highlighted)	 Quick & easy Requires little thought Already available Consume on the go 	 Stopped me feeling hungry Quick energy boost Long lasting energy Nutrition for my mind & body 	 Really tasty Quick & easy Nutrition for my mind & body
Key Competitors (territory of equivalent size within category occasions)	Apple Table Grapes	Apple	Berries



Competitive Review

	Benefits	Barriers
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.
Table Grapes	Refreshing. Sweet. Light. Consume on the go.	Expensive. Poor quality.
Berries	Quick & Easy. Refreshing. Sweet. Light. Rich in antioxidants. Nutrient dense.	Expensive. Goes off too quickly. Poor quality.









6. Appendix A: How to use this report





How to use this report



	ning a Mango, consumers s/lightness, more so than w Key Fi		Mango 🖍
	Refreshing taste	34%	
	Sweet	32%	
	Fresh/Light	32% 29%	
	Quick/ easy to prepare	28%	Flavour and Fun are other standout features for Mangos
	Good source of minerals&vitamins/Nutrition ally dense	12%	and whilst people want
	With a strong, intense flavour	5% ^{12%}	something that is quick and easy to prepare, Mangos do not
	Cancains fibre	13%	necessarily stand out on this attribute vs other fruits
	Fun/ exciting	11% 8%	
	That is good value for money	10% 13%	
	Low in fat	19%	
	II Mango O	ccasions Fruit Occasions	
KANTAR	Source: Kantar HIA Domestic Growth Study 2022		Hort Innovation 42

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

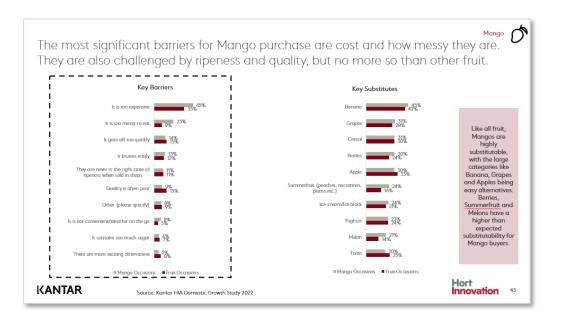
Attributes that have high scores are the most important reasons that people choose the commodity. Attributes that are higher than average are strengths for the commodity vs other fruit sub categories.



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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.



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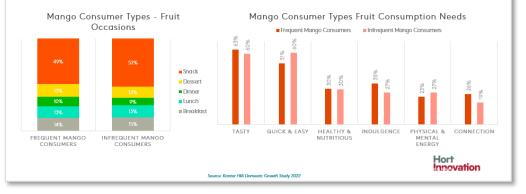
How to use this report

Slide 45: Light v Heavy Users

Fruit Usage

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

Infrequent Mango consumers tend slightly towards Quick & Easy and Snacks, yet still have plenty of room for Tasty and Indulgence.



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

Mango

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.

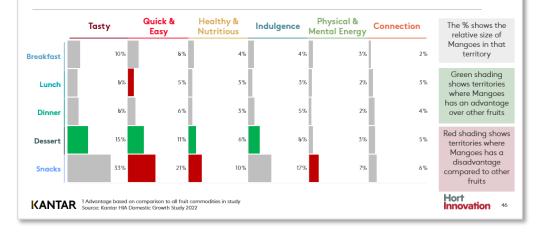


How to use this report

Slide 46: Category Territories

The Mango Territories

Mango have a strong advantage as a Tasty and Convenient Dessert compared to other fruit



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

Mango 🔿

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





Tasty



Food is seen as a pleasure rather than a fuel



Table stakes for all meal occasions – heightened for weekend dinners



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!

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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



Quick & Easy



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



Most important for those snacking moments – and also weekday dinners



Typically on my own









Healthy & Nutrition

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? (\square)

I prefer to eat more vegetables & less meat



🕑 When?

Most important for main meals – particularly during the work week





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



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



🕑 When?

Most prevalent when eating dessert & snacking





Can be either on my own or with family and friends







Physical & Menta 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.

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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



Breakfasts, snacks and sometimes lunch – particularly during the week



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



In this moment I enjoy trying new tastes & cuisines 🕑 When?

Desserts and weekend dinners



Family & friends











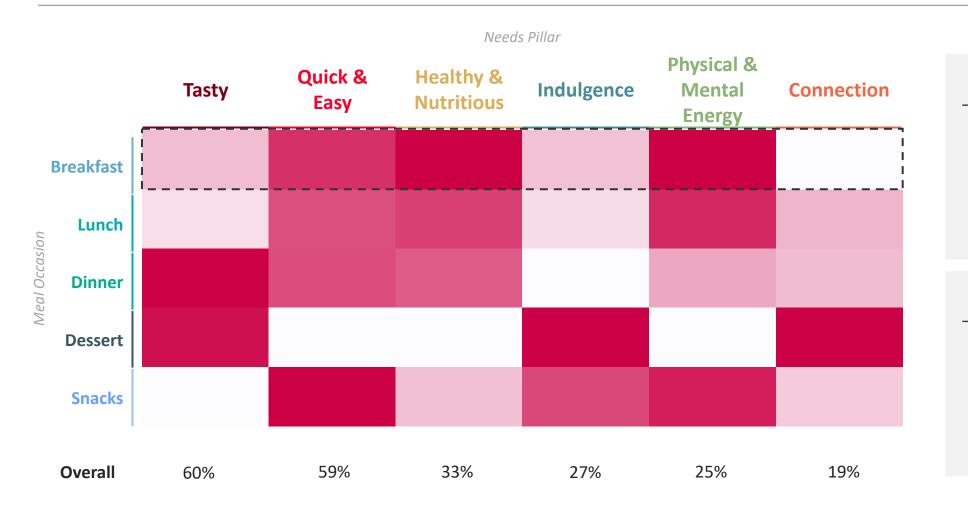
6. Appendix C: Demand Space Detail



Hort Innovation 72

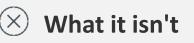
H Breakfast

At Breakfast time Needs skew towards Convenience and Health





Breakfast is all about Health, Convenience & Energy



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



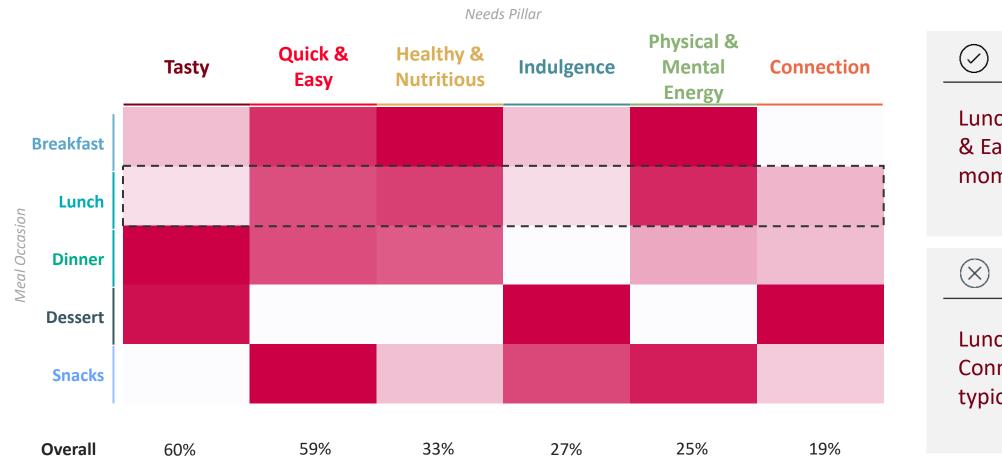
Lower Needs Share

The darker the colour, the more the meal occasion over indexes in that needs pillar



U Lunch

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



What it is

Lunch needs to be Quick & Easy and a Nutritious moment



Lunch is less about Connection and not typically Indulgent



Source: Kantar HIA Domestic Growth Study 2022

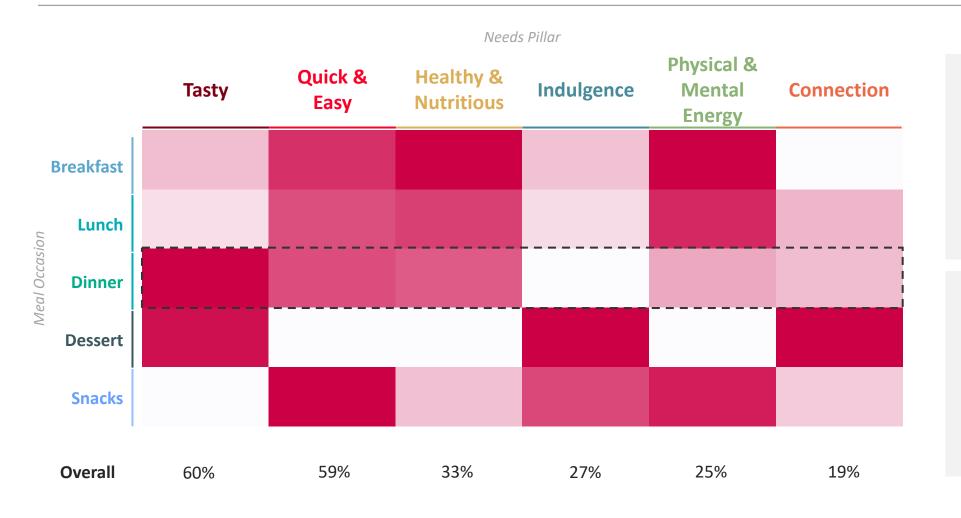
Lower Needs Share

The darker the colour, the more the meal occasion over indexes in that needs pillar



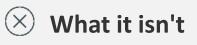
Dinner

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



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



Source: Kantar HIA Domestic Growth Study 2022

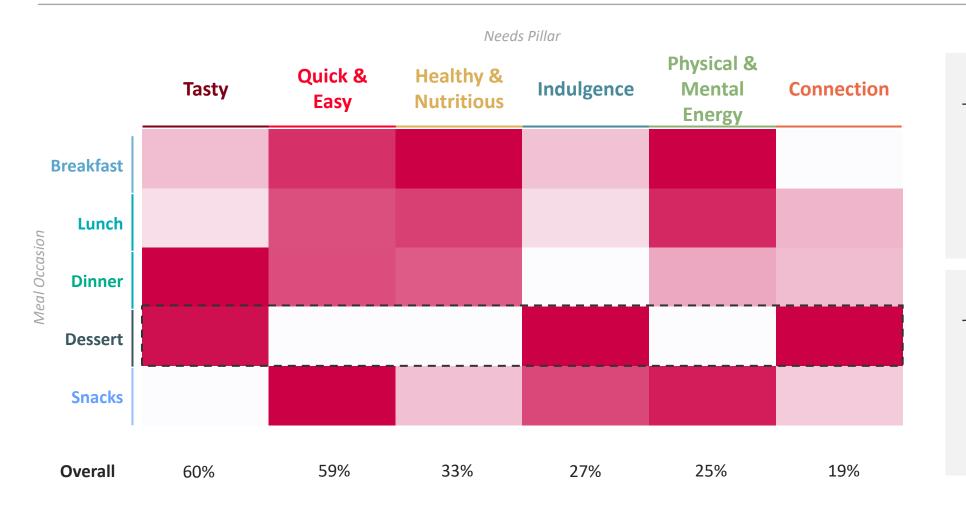
Lower Needs Share

The darker the colour, the more the meal occasion over indexes in that needs pillar



U Dessert

Dessert is all about Connecting and Indulging



 \bigcirc What it is

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



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



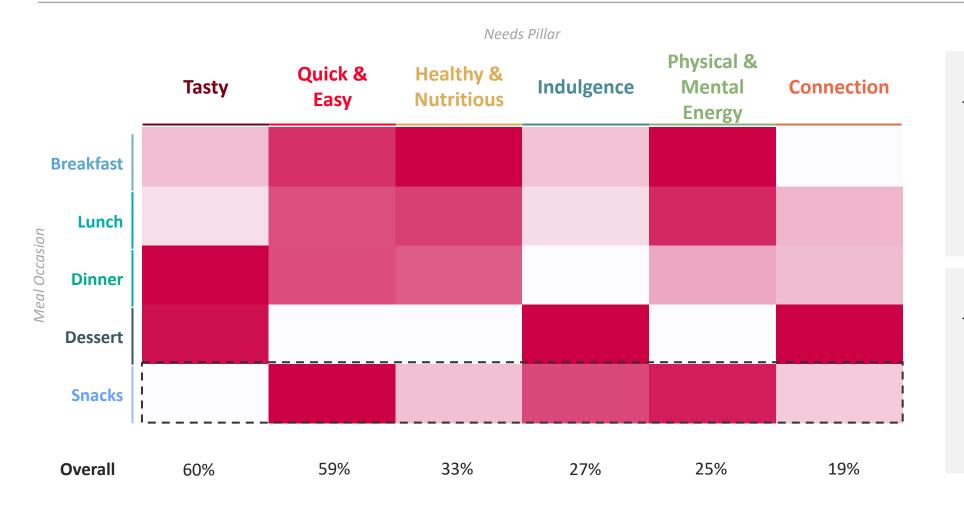
Lower Needs Share

The darker the colour, the more the meal occasion over indexes in that needs pillar



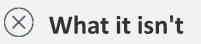
¶¶ Snacks

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



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



Source: Kantar HIA Domestic Growth Study 2022

Lower Needs Share

The darker the colour, the more the meal occasion over indexes in that needs pillar

