



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.



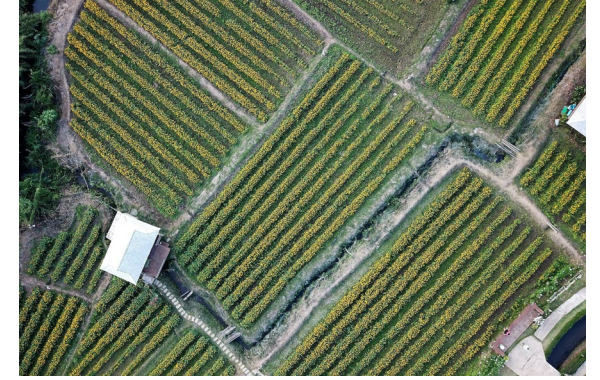
Objectives

- 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 (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**

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

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.

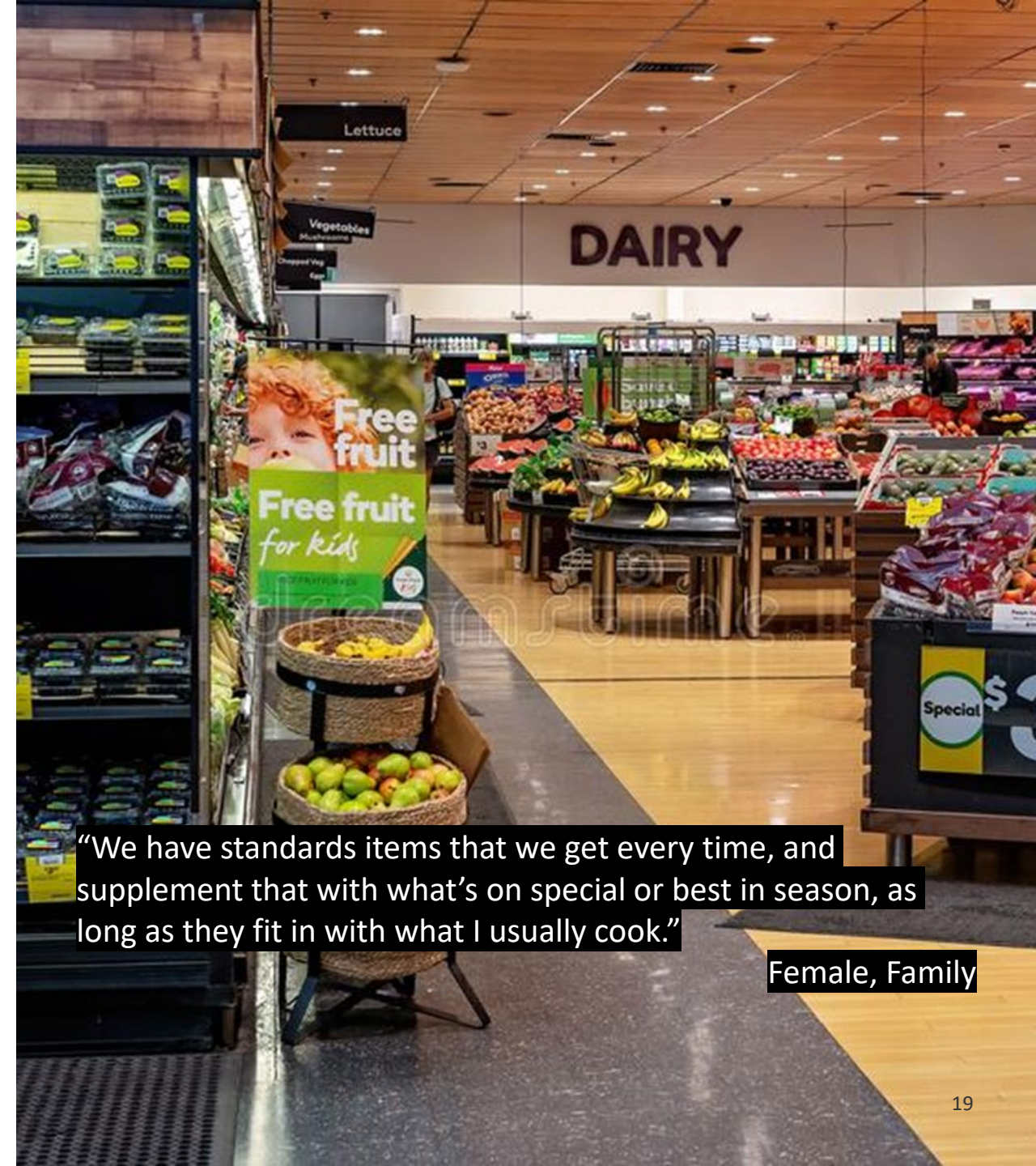
Ultimately, while the choice in the moment of consumption is important, the bigger decision comes in the purchase moment.

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.

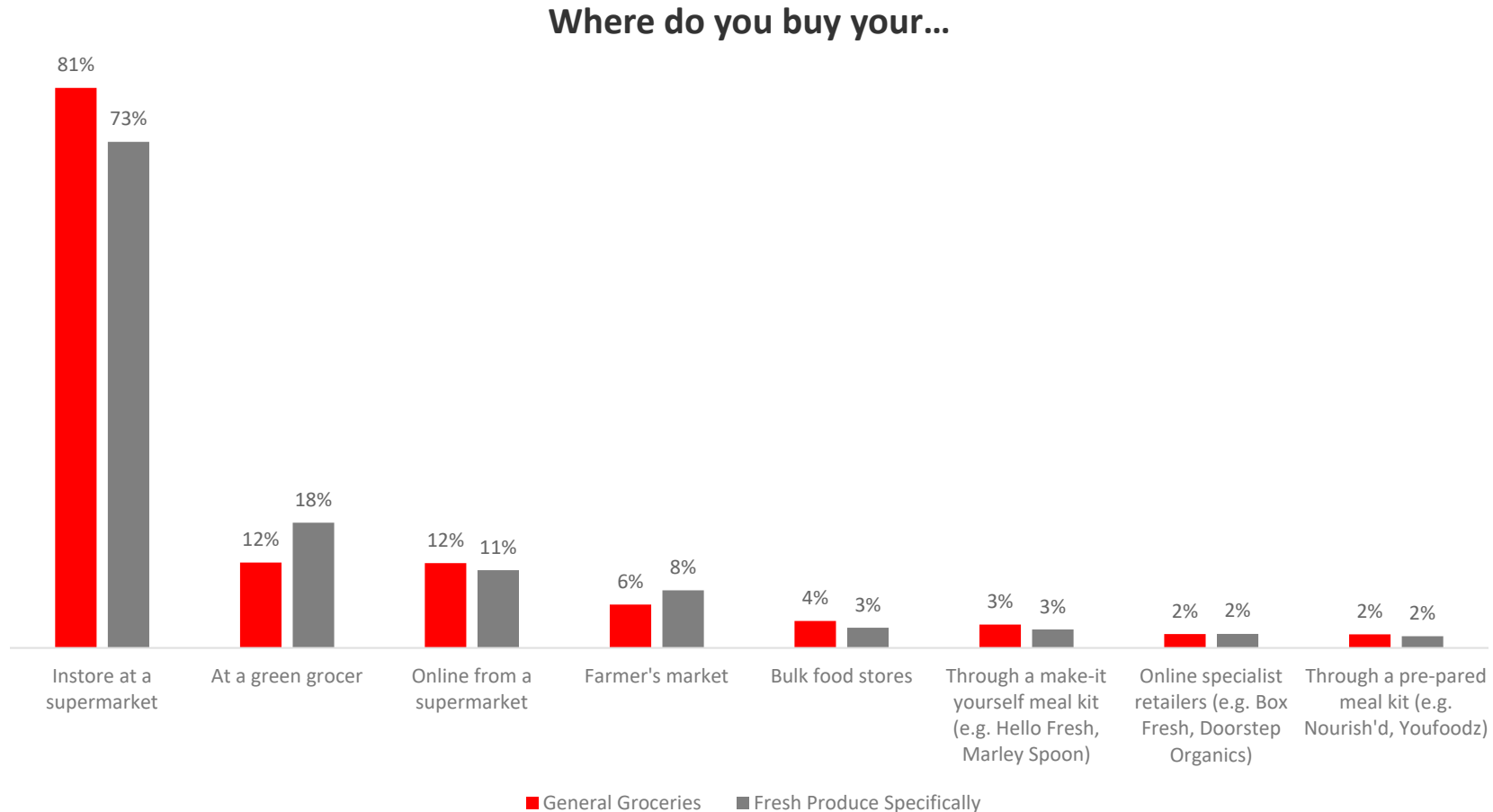


"We have standards items that we get every time, and supplement that with what's on special or best in season, as long as they fit in with what I usually cook."

Female, Family

Groceries are overwhelmingly purchased in store at a supermarket

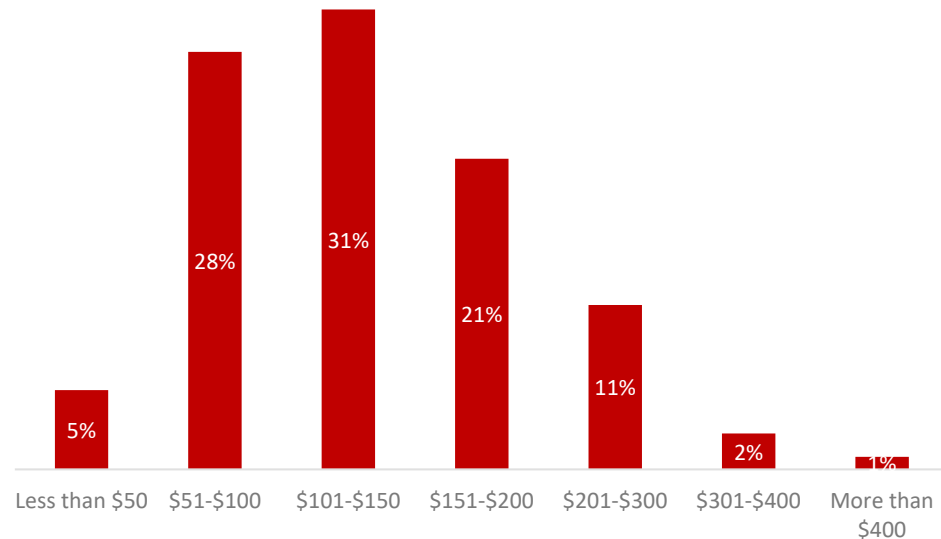
Nearly 1 in 5 consumers get fresh produce from a green grocer



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?



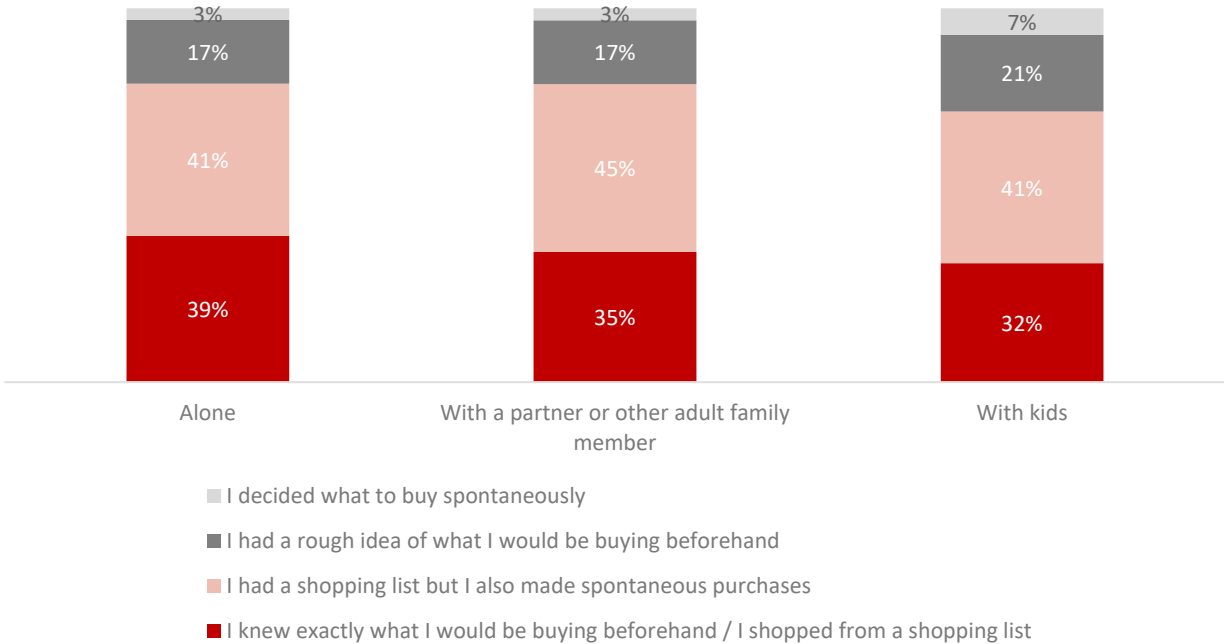
35%

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

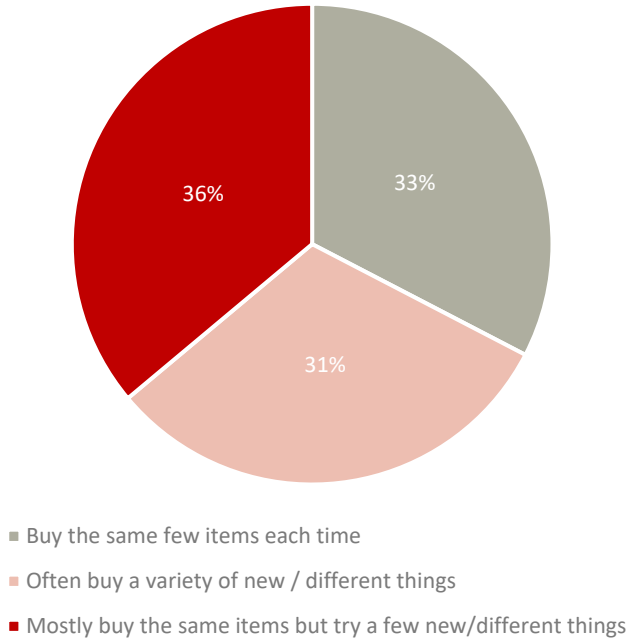
Consumers like to use a list, although they are open to spontaneous purchases

Attitudes towards new and different items differ across the consumer base

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



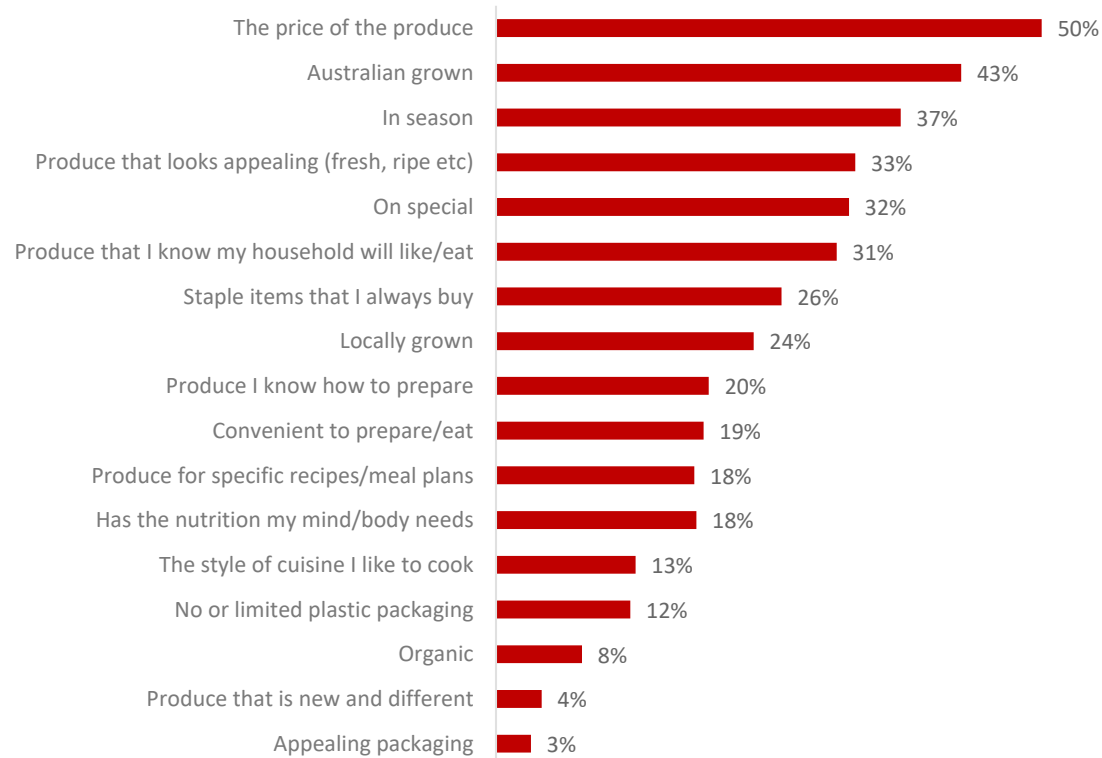
When shopping for fresh produce do you...



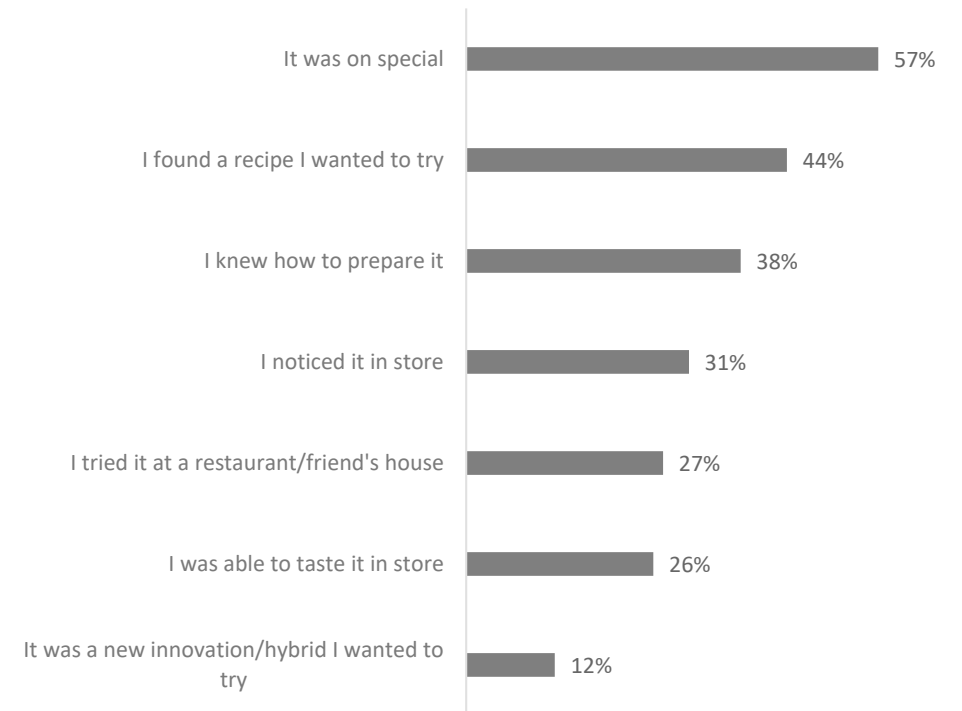
Price aside, the biggest purchase drivers are Australian grown and in season

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?

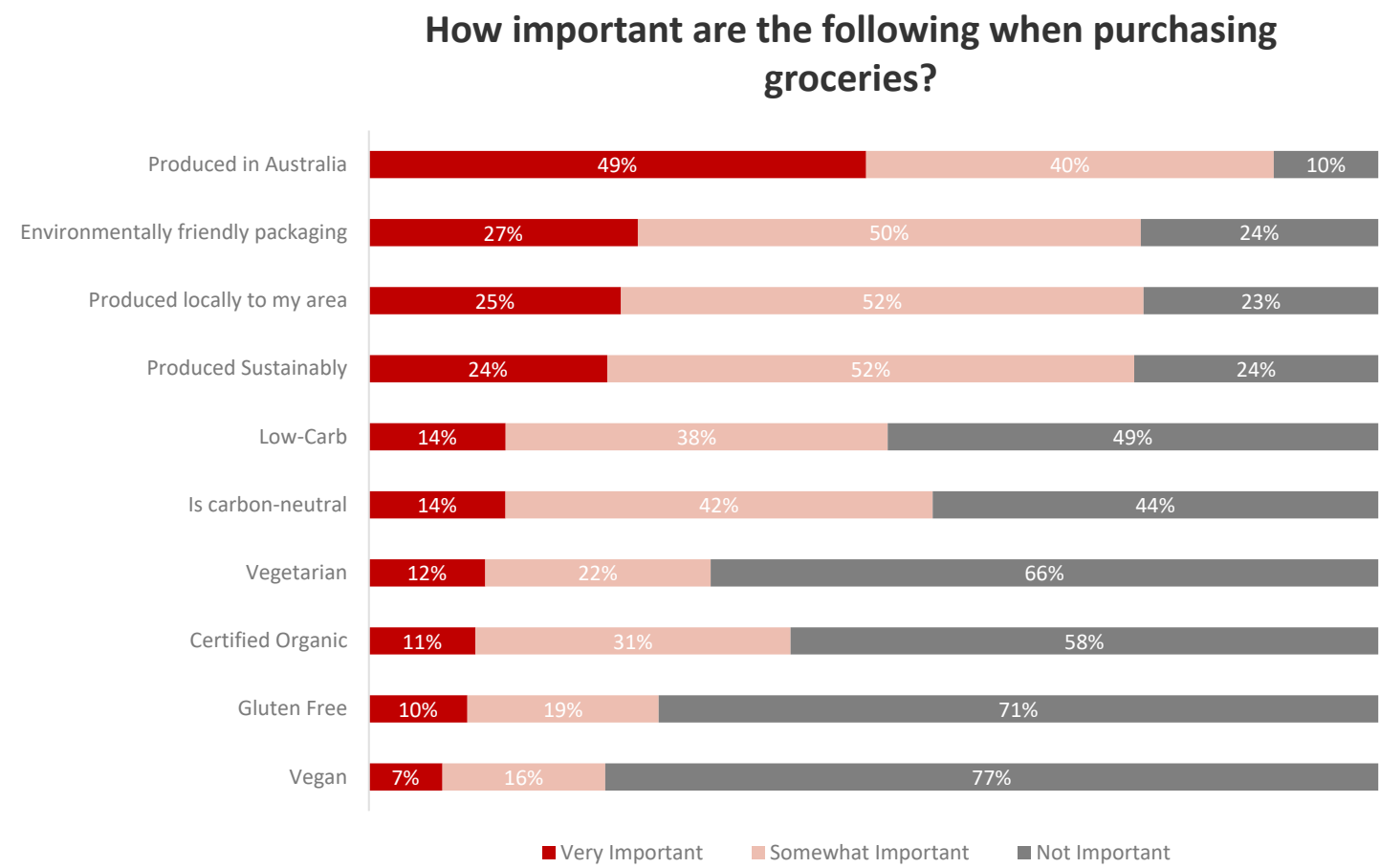


What would encourage you to purchase fresh produce you wouldn't normally buy?



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?



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

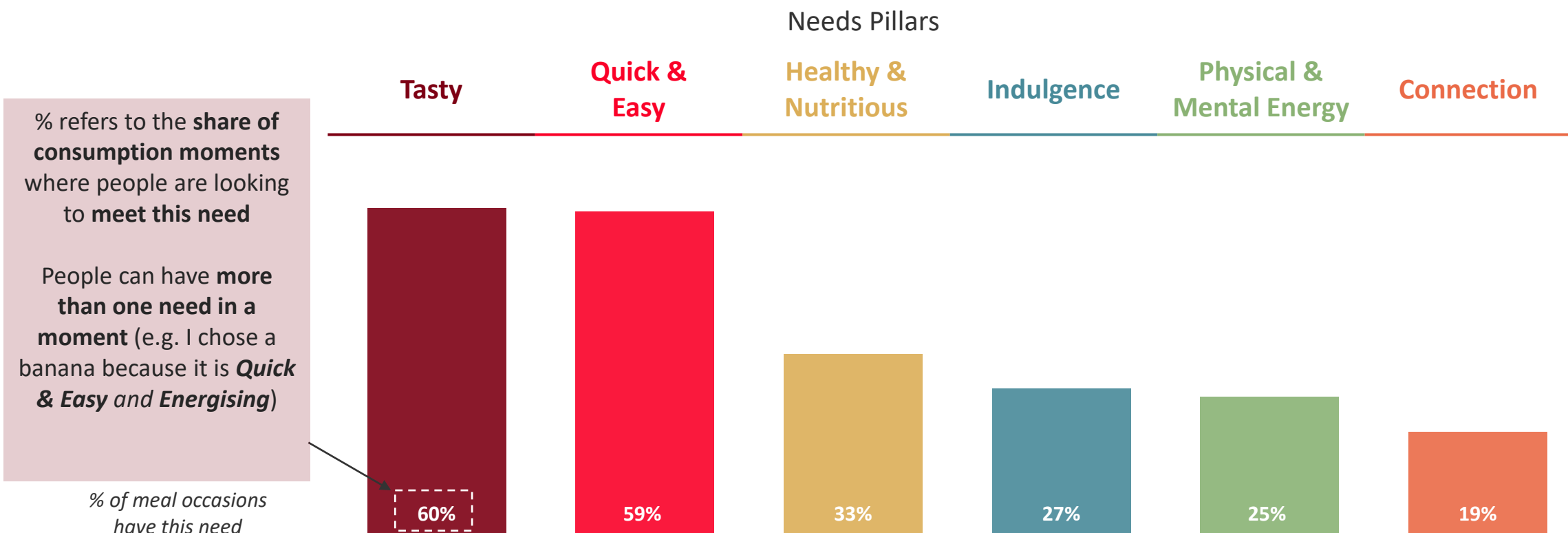


Connection

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



Breakfast

Morning meal

Lunch

Mid-day meal

Dinner

Evening meal

Dessert

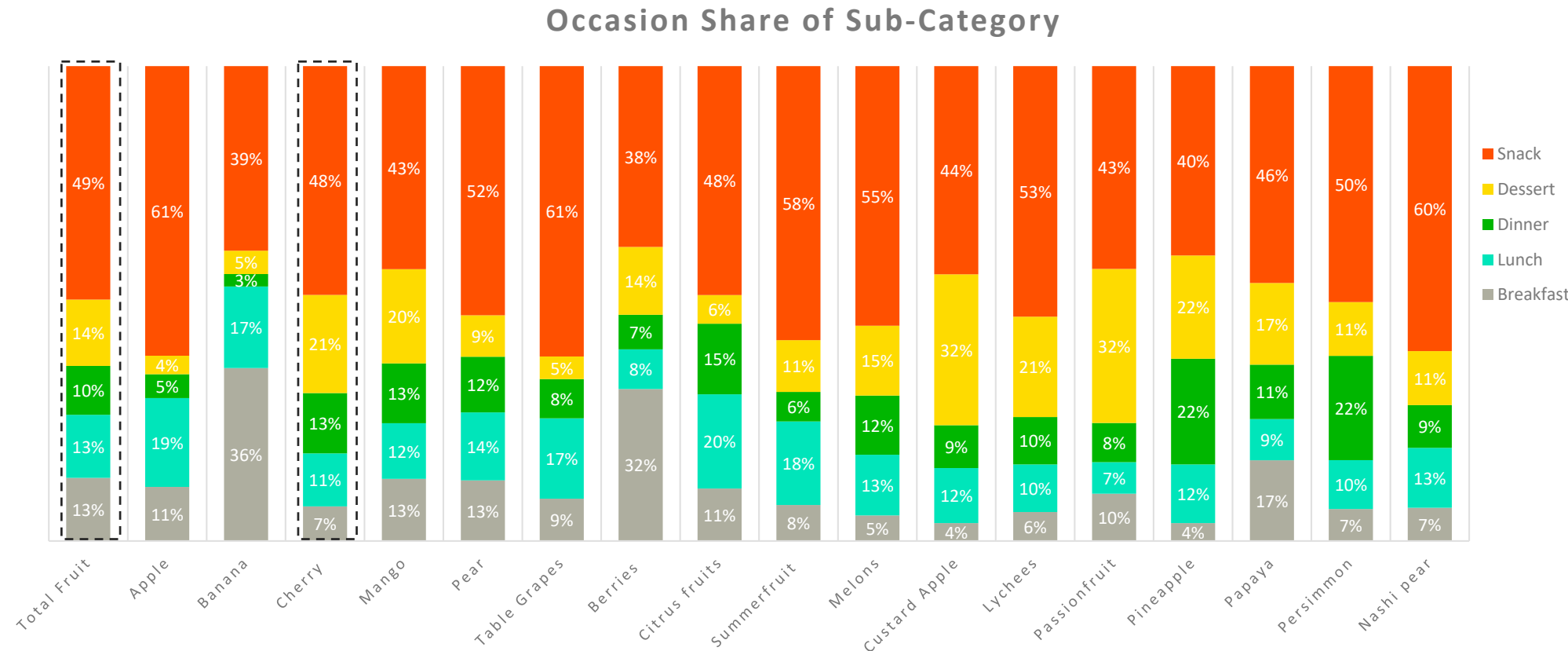
Post-dinner

Snacks

Between meals

Fruit by consumption occasion

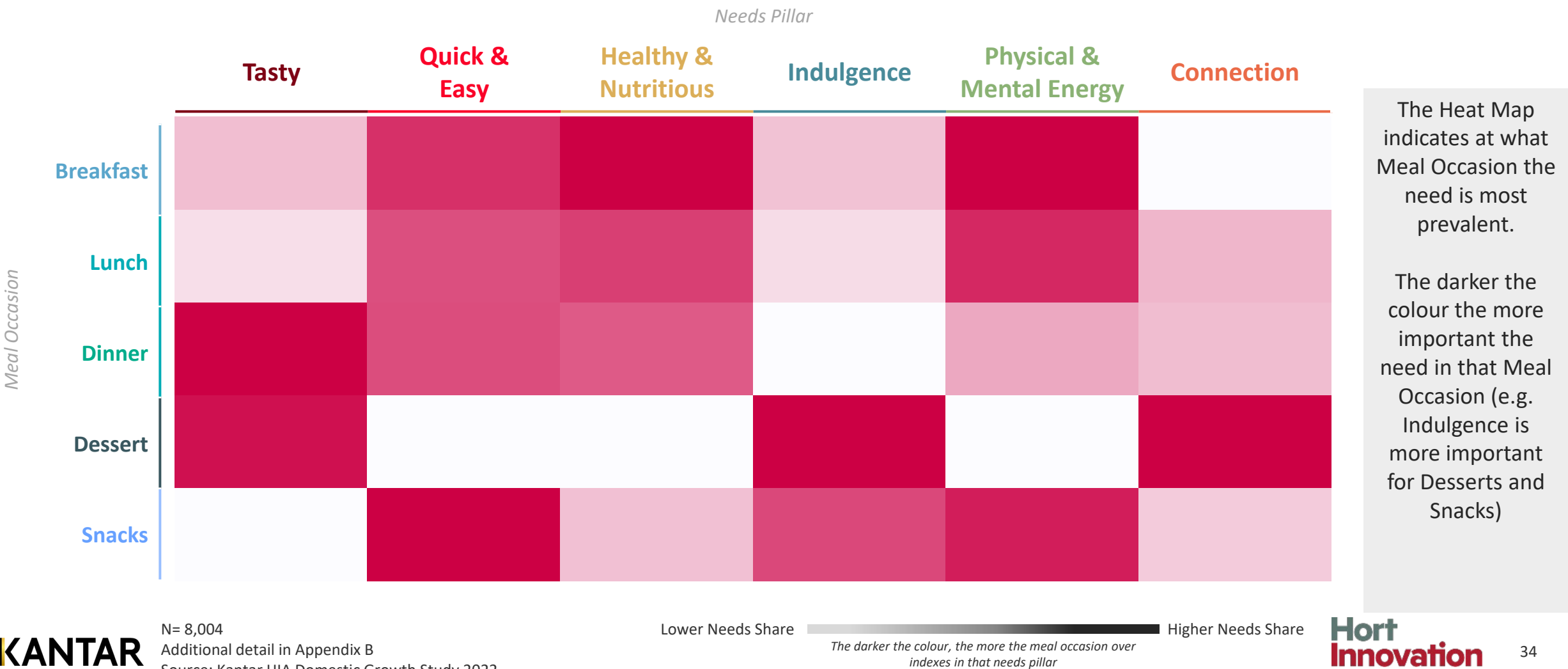
Snack Occasions are 48% of Cherry occasions, which is in line with the average of 49% for All Fruit. Dessert is 21% of all Cherry occasions, an over-representation vs 14% for All Fruit.



Demand Space Framework

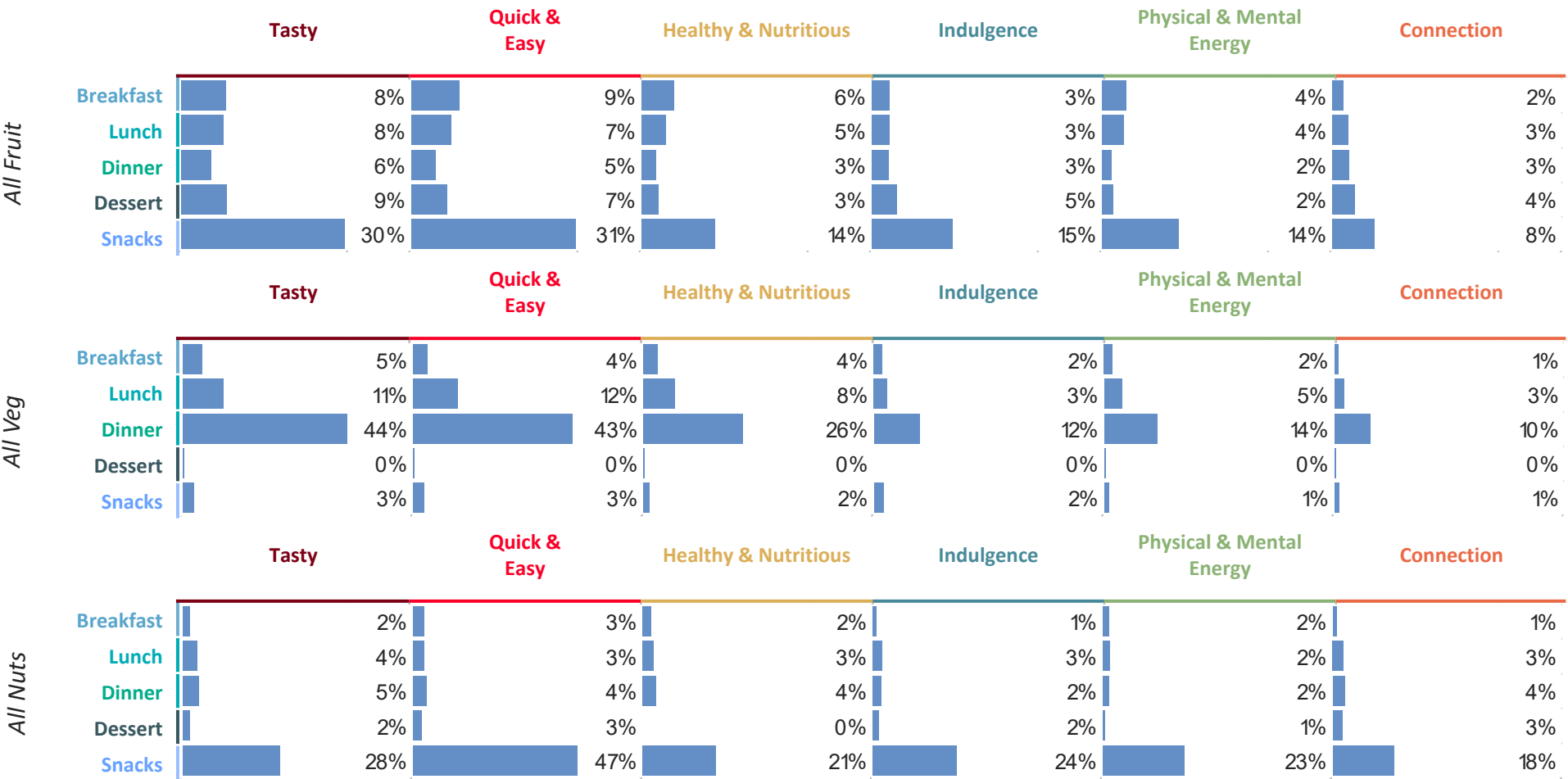
		Needs Pillar					
		Tasty	Quick & Easy	Healthy & Nutritious	Indulgence	Physical & Mental Energy	Connection
Meal Occasion	Breakfast						
	Lunch						
	Dinner						
	Dessert						
	Snacks						

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. Cherry 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



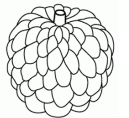
Cherry



Chestnut



Citrus



Custard
Apple



Dried Fruit



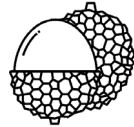
Fruiting
Vegetables



Hard
Vegetables



Leafy
Vegetables



Lychees



Macadamia



Mango



Melon



Mushroom



Nashi



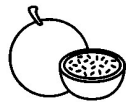
Olives



Onions



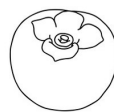
Papaya



Passionfruit



Pear



Persimmon



Pineapple



Potatoes



Summer
Fruit



Sweet
Potatoes

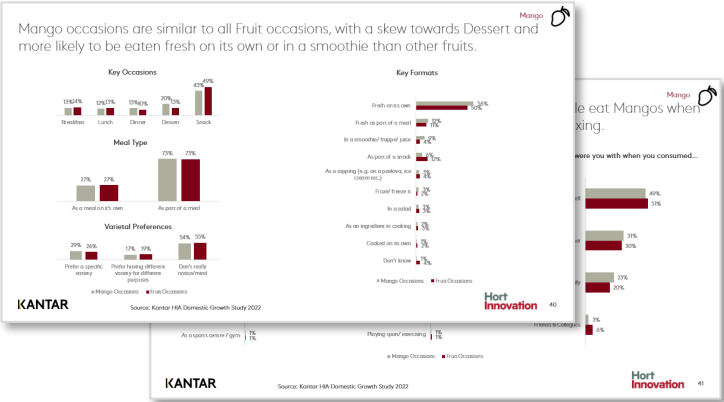


Table Grapes

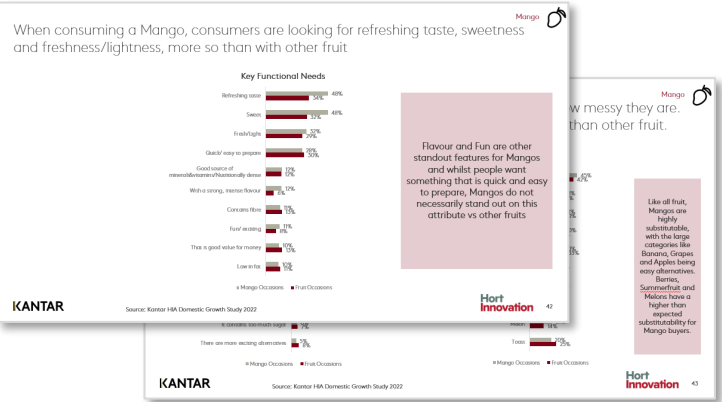
Content for Each Commodity

What’s included for each commodity?

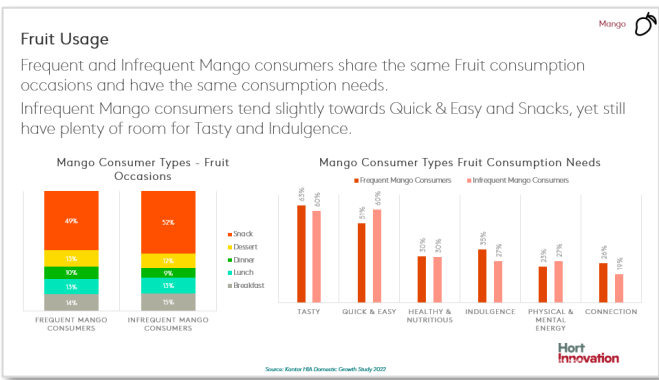
Commodity Occasions



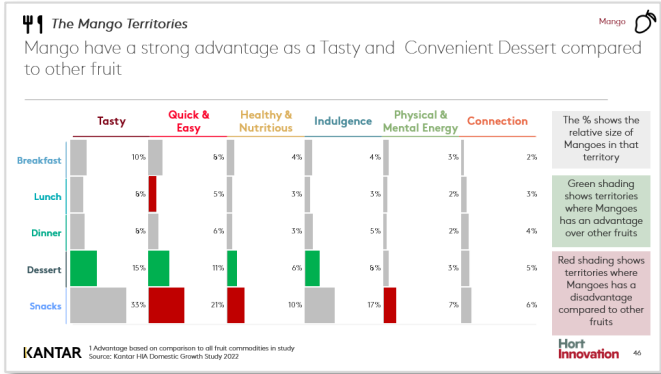
Drivers/Barriers/Substitutes



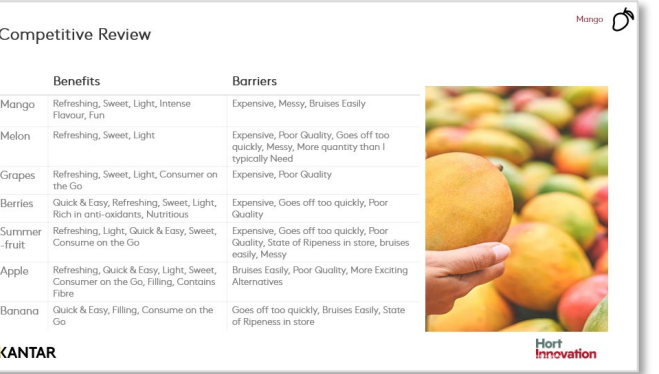
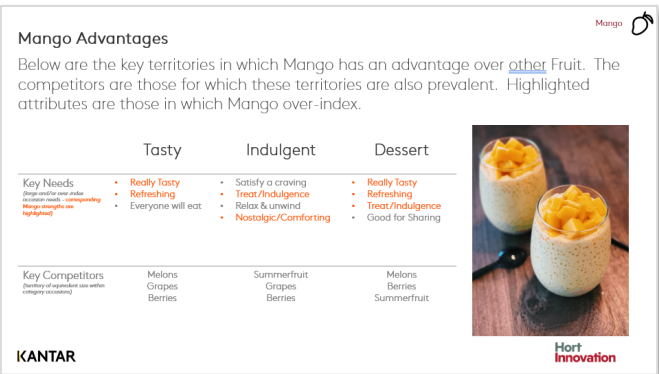
Light v Heavy Consumers



Where to Play



How to Win

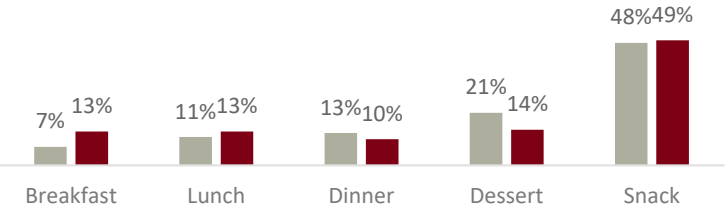


Cherry

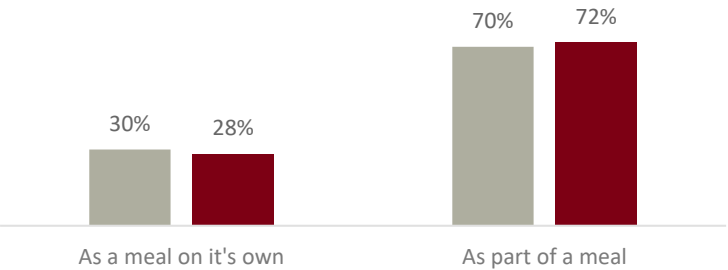


Cherry occasions are similar to all Fruit occasions, with a skew towards Dessert and most likely to be eaten fresh on their own or as part of a snack.

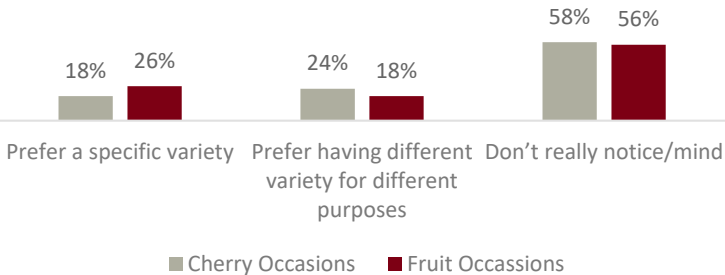
When did you consume...



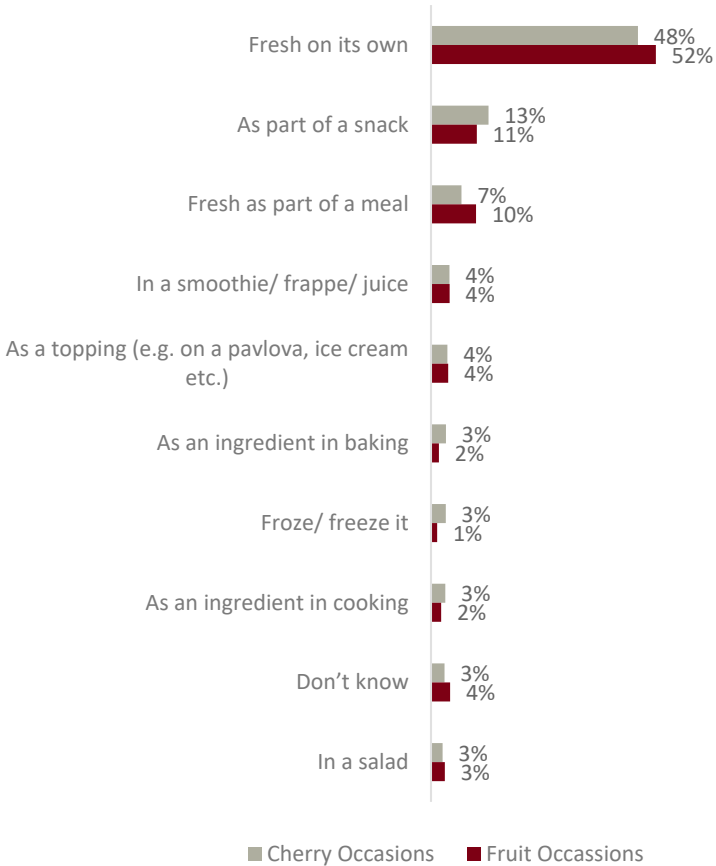
Did you consume it...



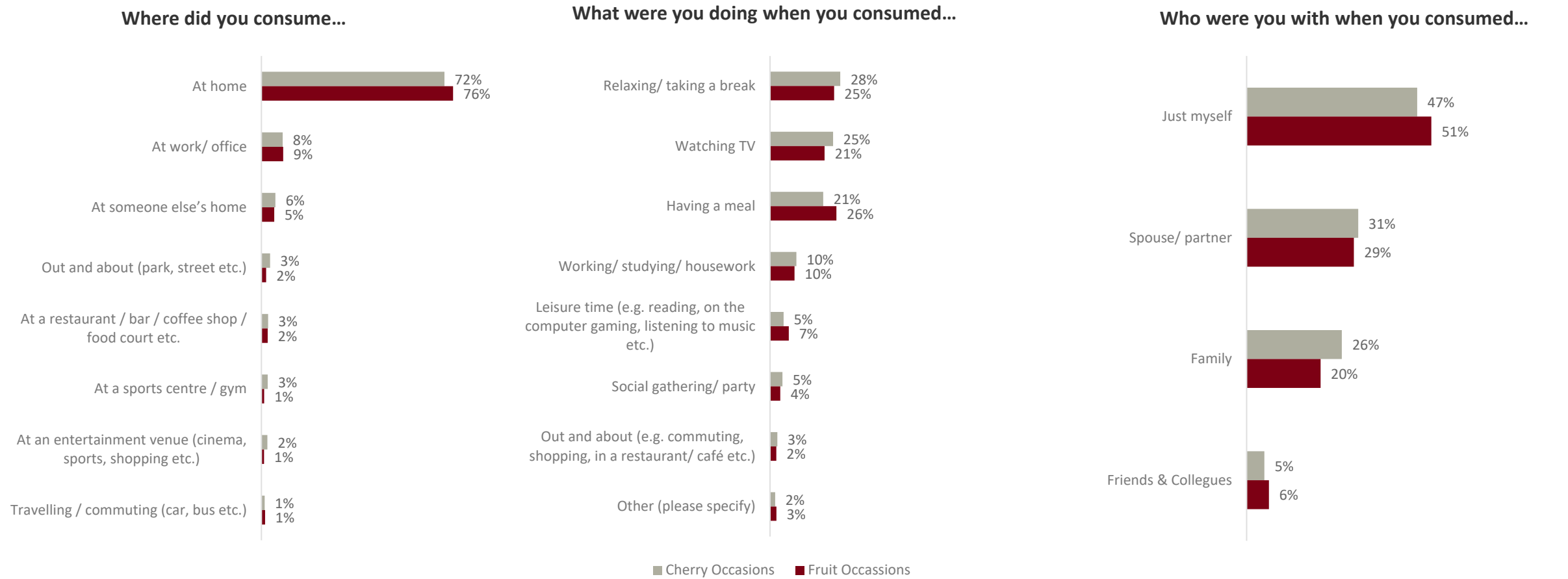
When you typically buy or eat cherries do you prefer a specific variety?



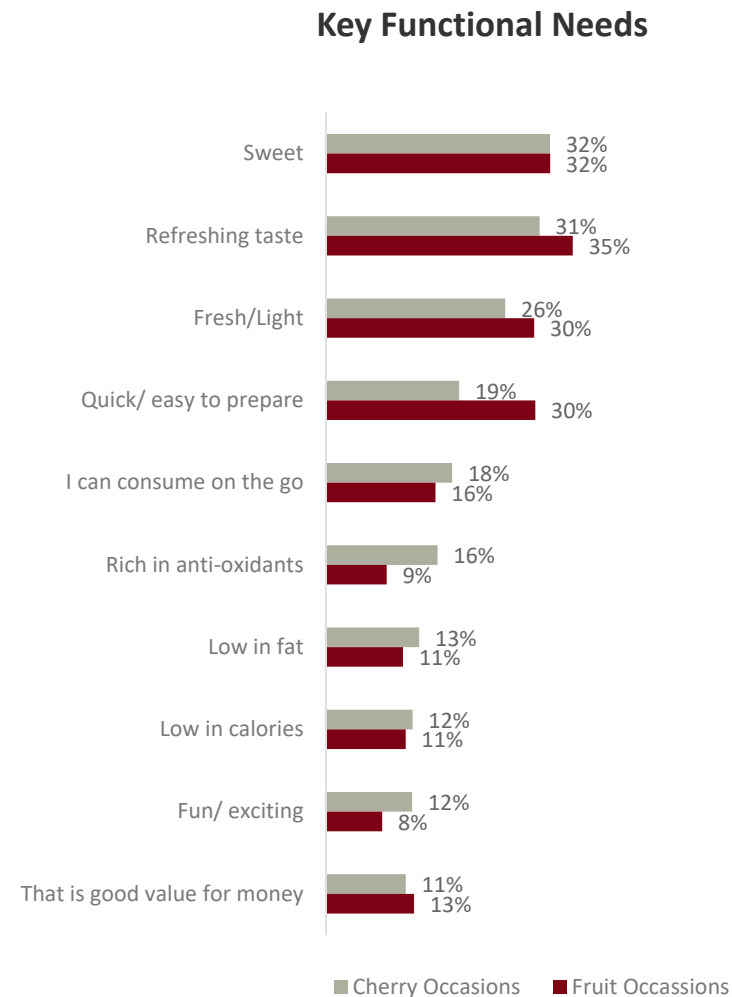
How did you eat...



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



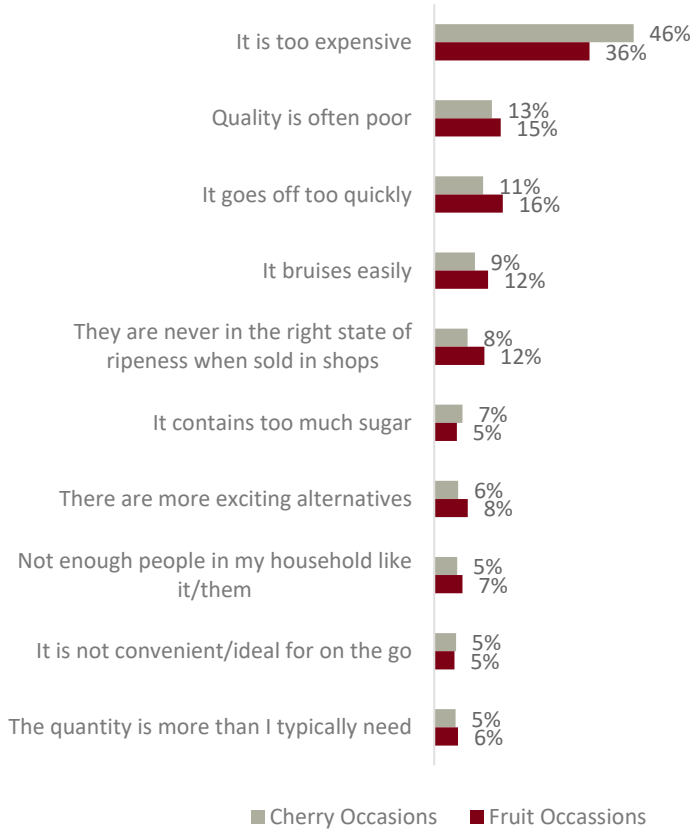
When eating Cherries, consumers are looking for sweetness and a light and refreshing taste, similar to all fruits



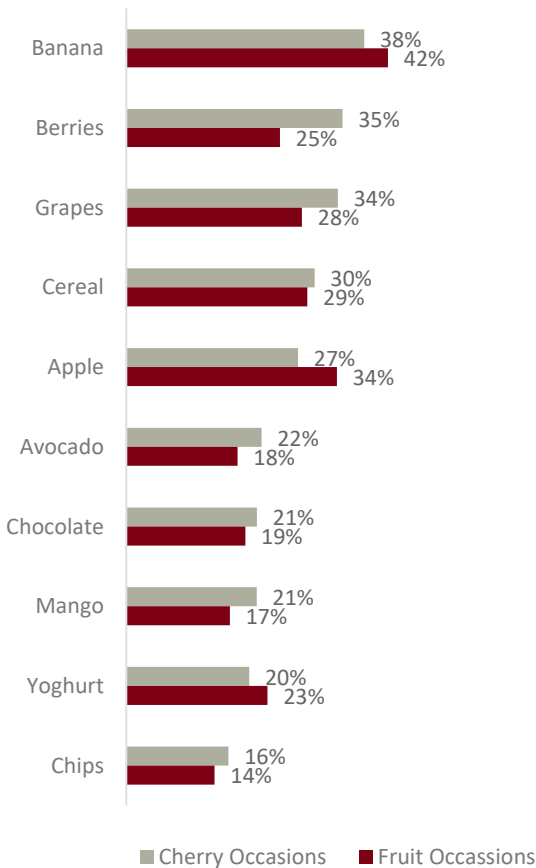
Whilst people want something that is sweet and light, Cherries do not necessarily stand out on this attribute vs other fruits

The most significant barriers for Cherries is their cost. They are also challenged by quality and how fast they expire, but no more so than other fruit.

Key Barriers



Key Substitutes

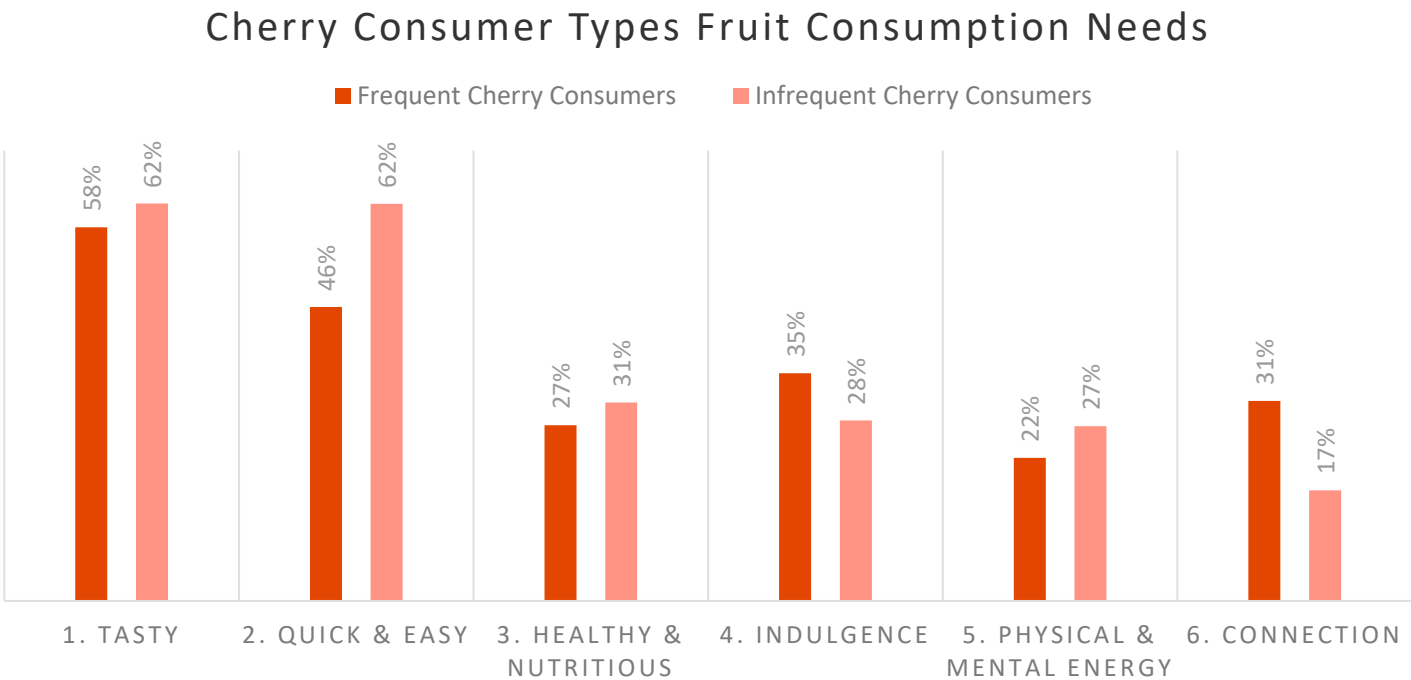
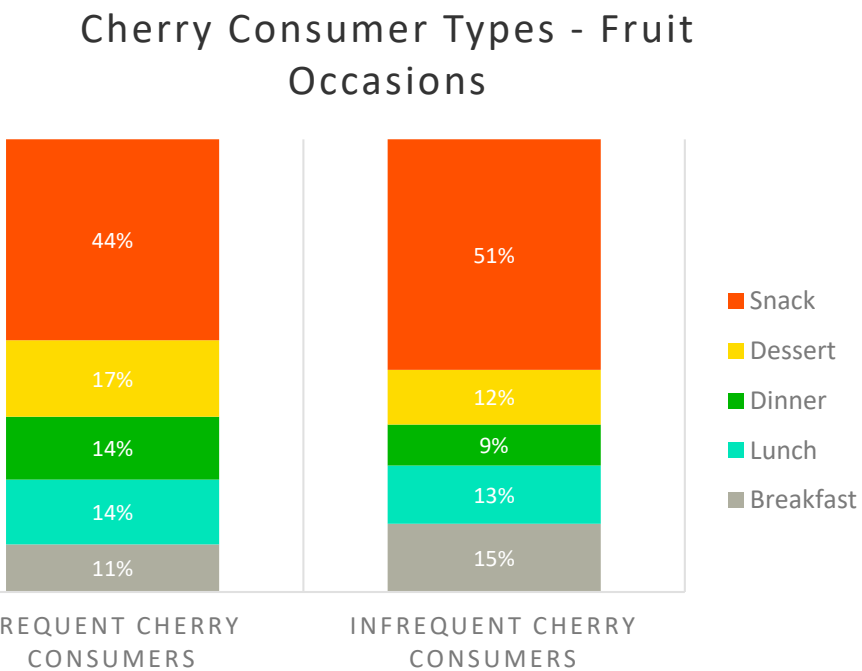


Cherries are more substitutable with Berries than other fruits although other major fruits are still common substitutes such as Bananas, Grapes, Apples & Mangoes

Cherry Usage

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

Infrequent Cherry consumers tend slightly towards Quick & Easy needs and the Snack occasion, yet are motivated by the need for Tasty and Nutritious.



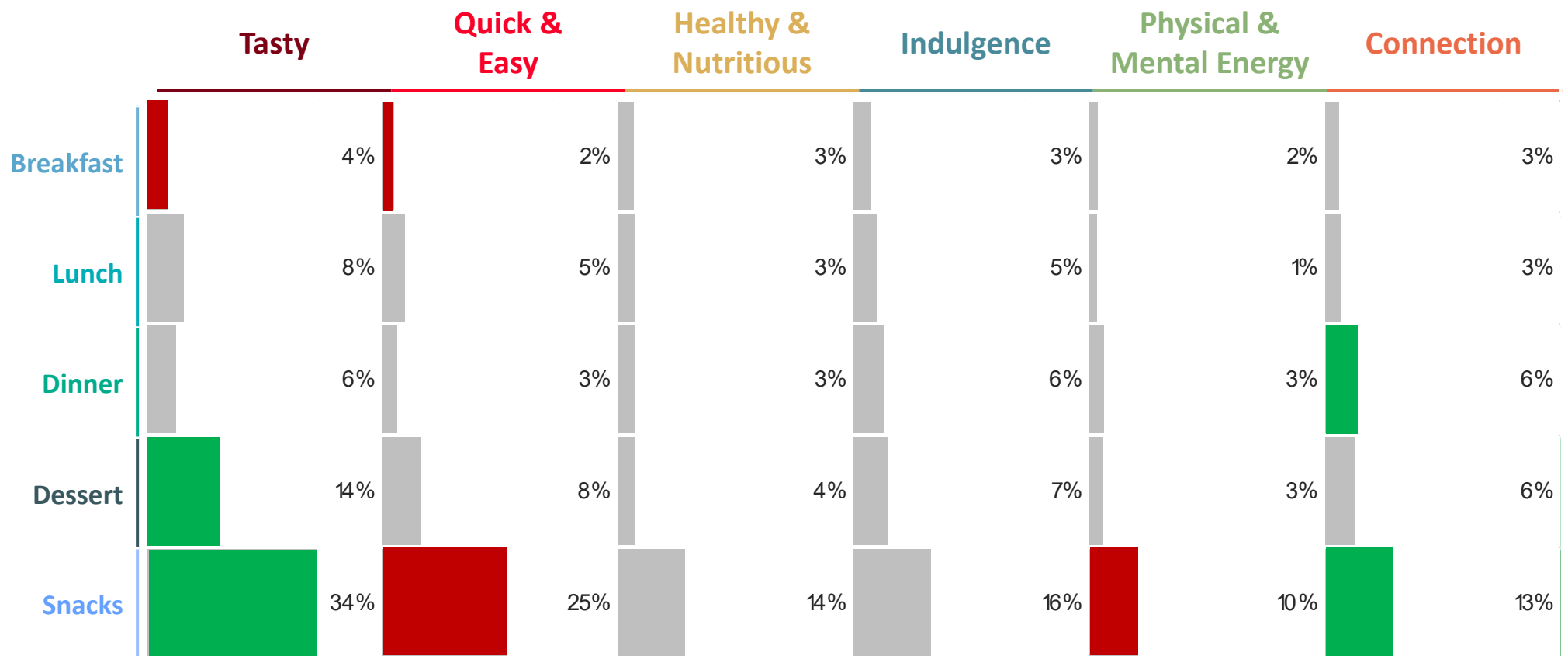


The Cherry Territory Advantage

Cherry



Cherries have a strong advantage over other fruits in the Connection Dessert and Snacking spaces, stretching toward the Indulgent Dessert space



The advantage is where cherries have a greater right to play when compared to the average of all fruits in the study

N= 373 Cherry Occasions

1 Advantage based on comparison to all fruit commodities in study

Source: Kantar HIA Domestic Growth Study 2022

Lower Advantage

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

Higher Advantage

Cherry Advantages

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

	Tasty	Connection	Dessert
Key Needs <i>(large and/or over-index occasion needs corresponding Cherry strengths are highlighted)</i>	<ul style="list-style-type: none"> Really tasty Refreshing Everyone will eat 	<ul style="list-style-type: none"> Good for sharing New and different Makes the moment special Festive/Celebratory 	<ul style="list-style-type: none"> Really tasty Refreshing Treat/Indulgence Good for sharing
Key Competitors <i>(territory of equivalent size within category occasions)</i>	Mango Table Grapes Berries Pineapple	Persimmon Custard Apple Passionfruit Papaya Lychees	Mango Passionfruit Custard Apple Berries Pineapple



Competitive Review

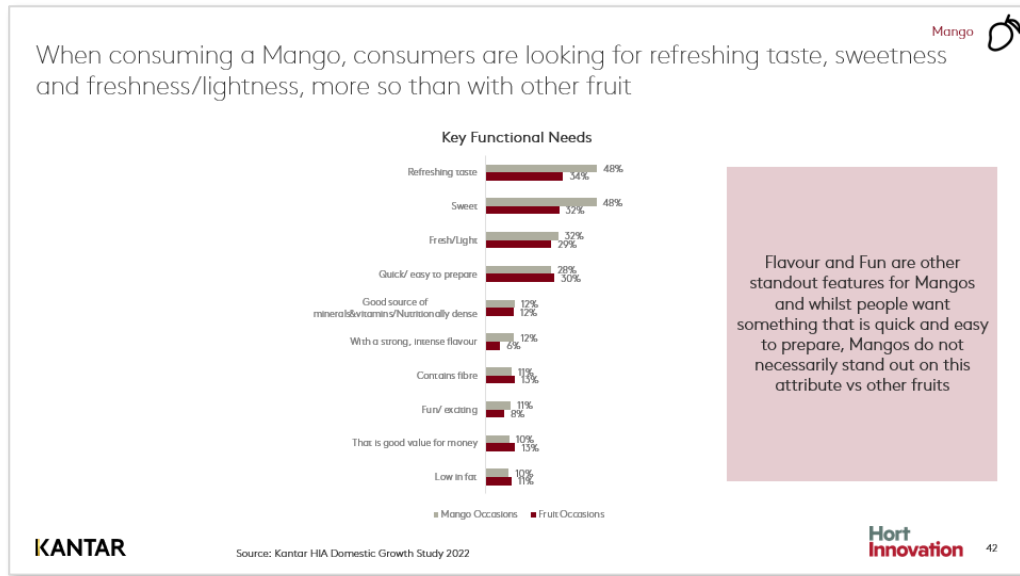
	Benefits	Barriers
Cherries	Sweet. Refreshing. Light. Consume on the go. Rich in antioxidants.	Expensive.
Berries	Quick & Easy. Refreshing. Sweet. Light. Rich in antioxidants. Nutrient dense.	Expensive. Goes off too quickly. Poor quality.
Mango	Refreshing. Sweet. Light. Intense Flavour. Exciting/Fun.	Expensive. Too messy. Bruises easily.
Table Grapes	Refreshing. Sweet. Light. Consume on the go.	Expensive. Poor quality.
Melons	Refreshing. Light. Sweet. Quick & easy.	Too messy. Quantity more than I need. Not liked by the whole household.
Passionfruit	Refreshing. Sweet. Quick & easy. Enhances flavour. Adds texture.	Expensive. State of Ripeness in store. Don't know what to do with it.
Lychee	Refreshing. Sweet. Light. Exotic. Exciting/Fun.	Expensive. Not liked by the whole household. Too messy.
Custard Apple	Exotic. Exciting/Fun. Quick & easy.	Expensive. Don't like the Texture. Don't like the Taste. Takes too long to prepare.
Pineapple	Refreshing. Sweet. Light. Enhances flavour.	Too messy. Takes too long to prepare. Quantity more than I need. Too much sugar. Not convenient.
Papaya	Exotic. Low in calories. Contains fibre. Filling.	Not liked by the whole household. Don't like the Taste. Poor Quality. State of Ripeness in store.



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

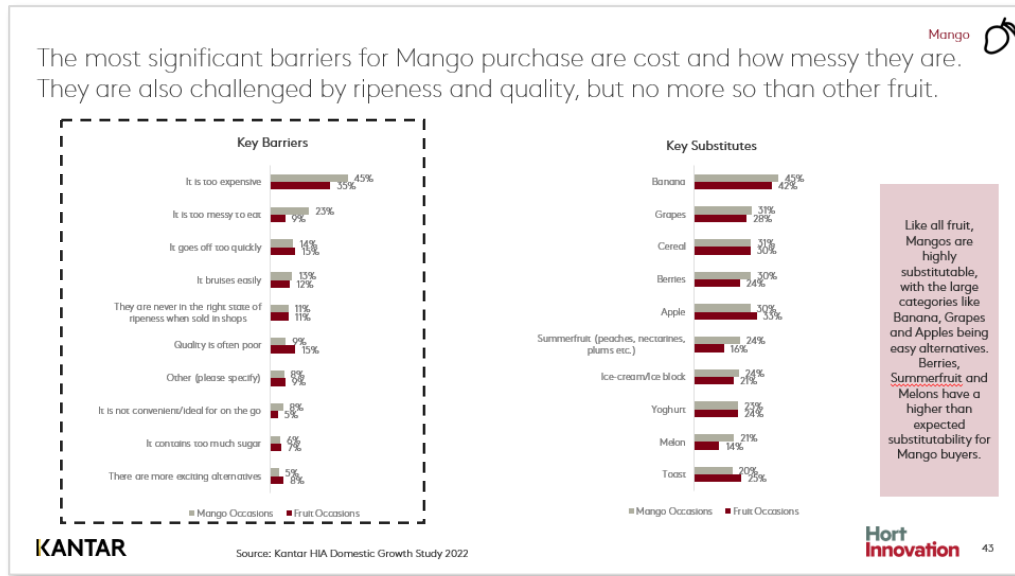
The charts provide the % who selected each reason for choosing the commodity. The higher and lower than average bars indicate higher and lower % scores for the commodity vs. the average of all fruit.

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

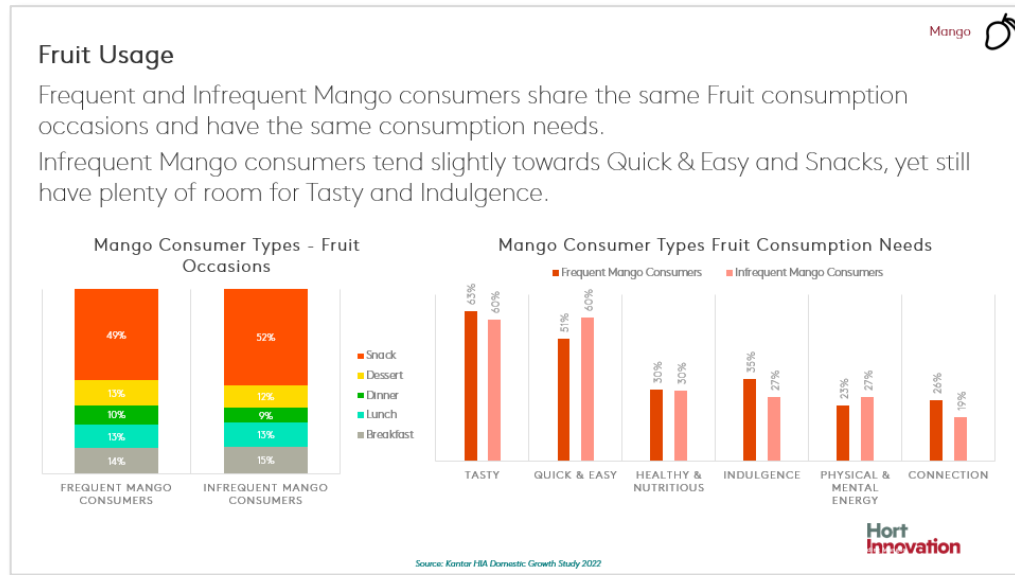
The charts provide the % who selected each reason they may not choose the commodity. The higher and lower than average bars indicate higher and lower % scores for the commodity vs. the average of all fruit.

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.

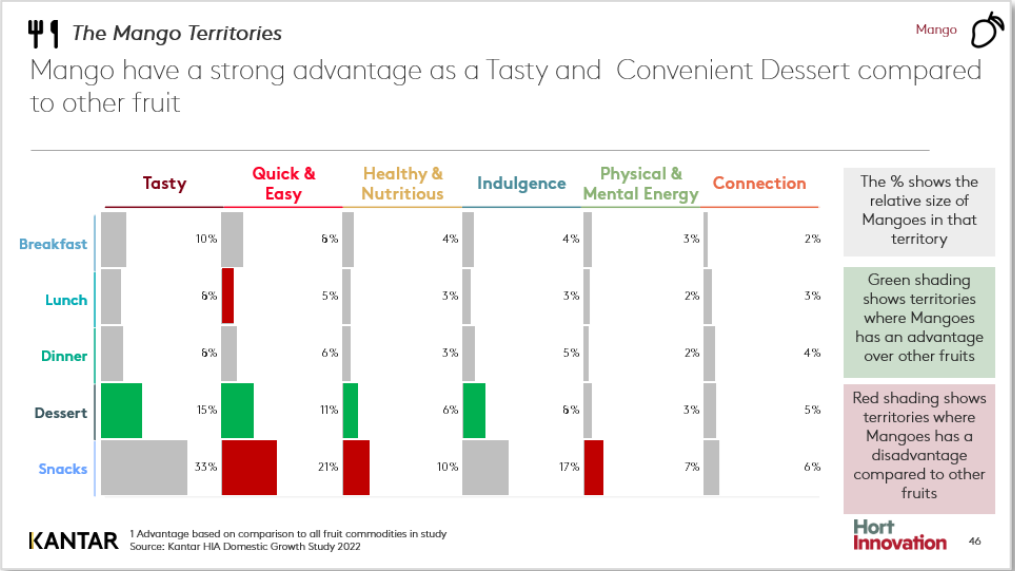
The charts show light users vs heavy user. Heavy users eat the commodity at least once a fortnight. Light users eat the commodity once a month or less.

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

A hand is pouring a vibrant green smoothie from a glass jar into a clear glass. Another glass filled with the same smoothie is visible in the background. The scene is set on a light-colored surface with a soft, natural light background.

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?

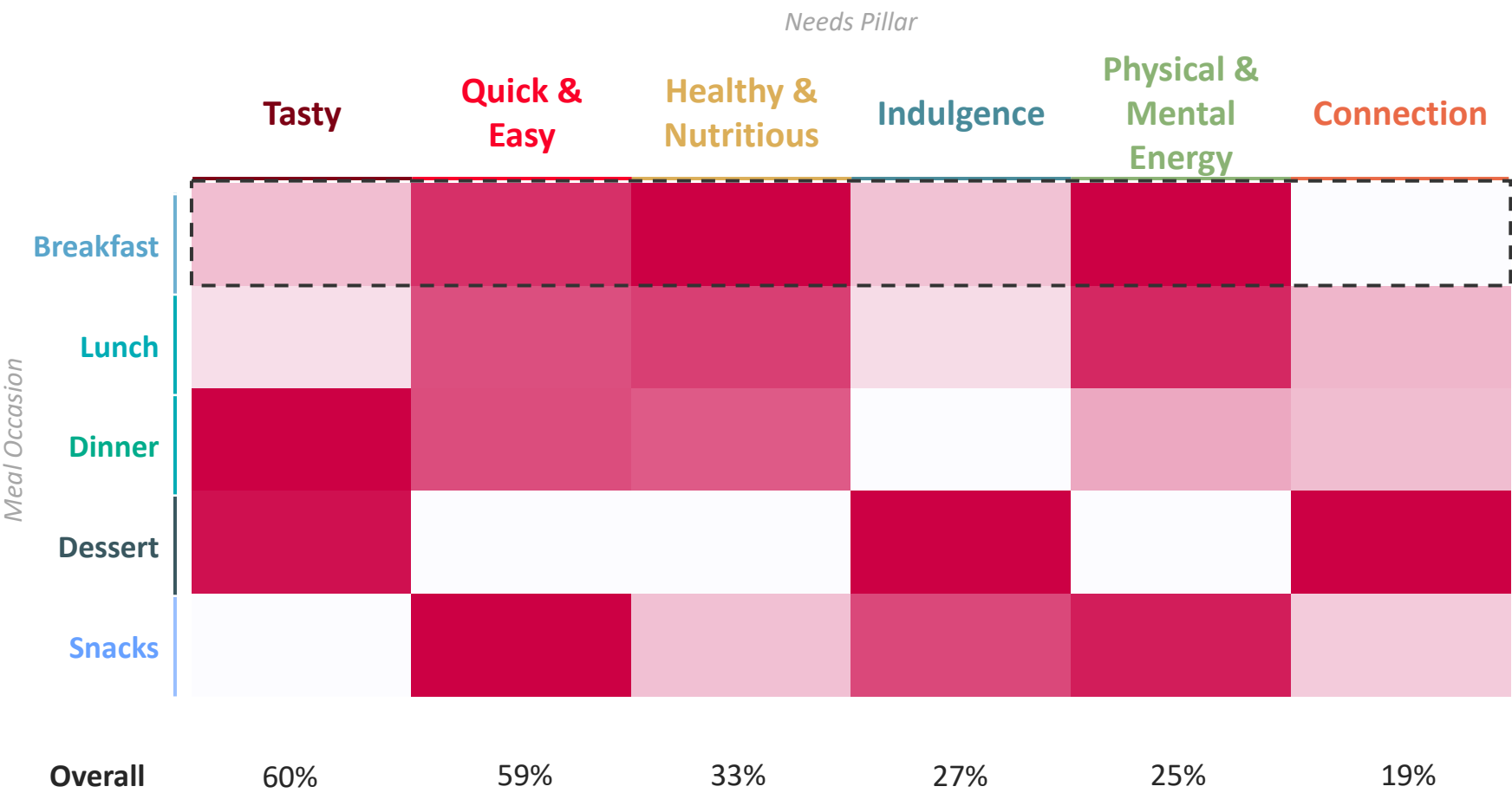
Family & friends







6. Appendix C: Demand Space Detail

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



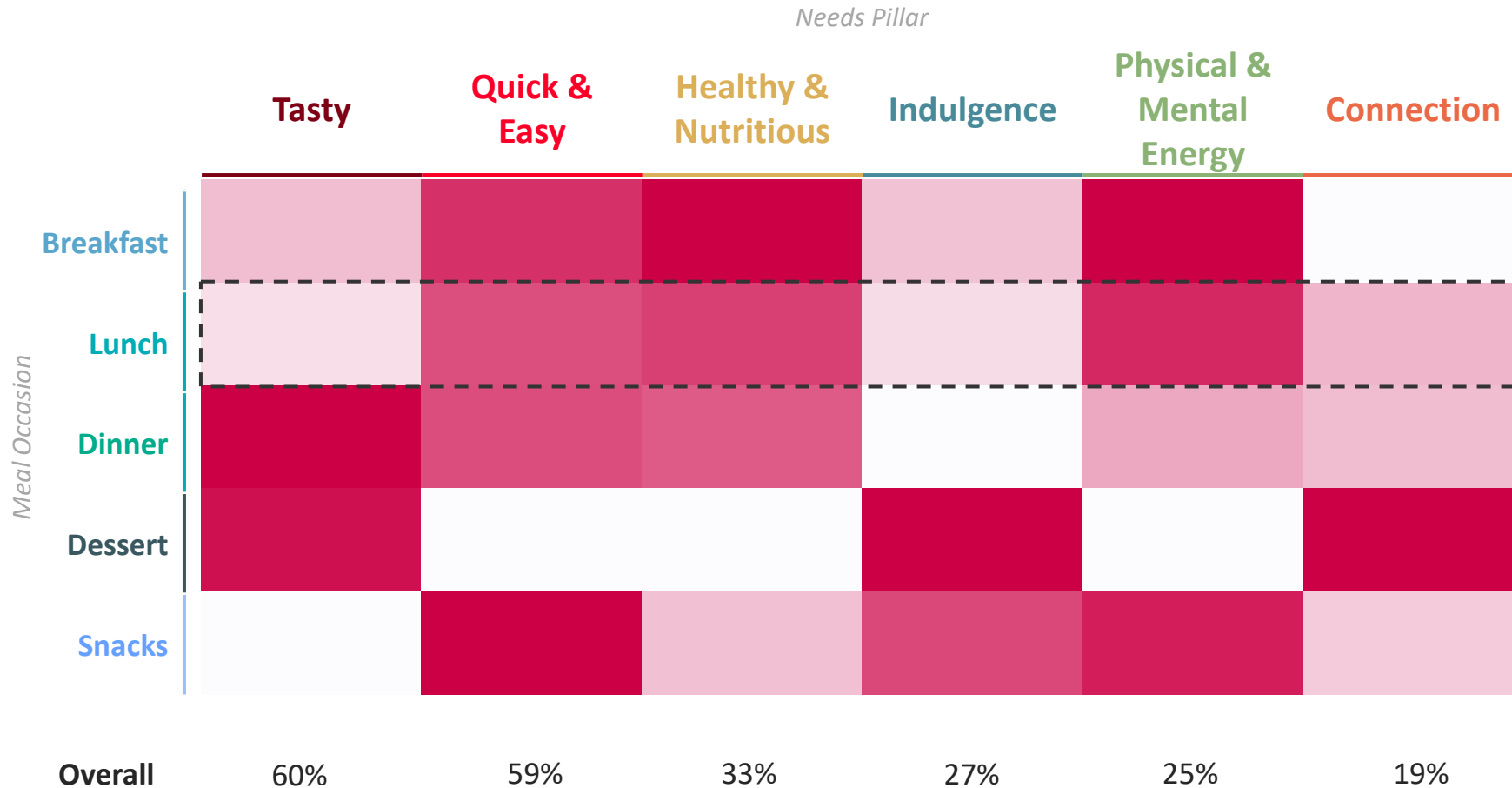

What it is

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



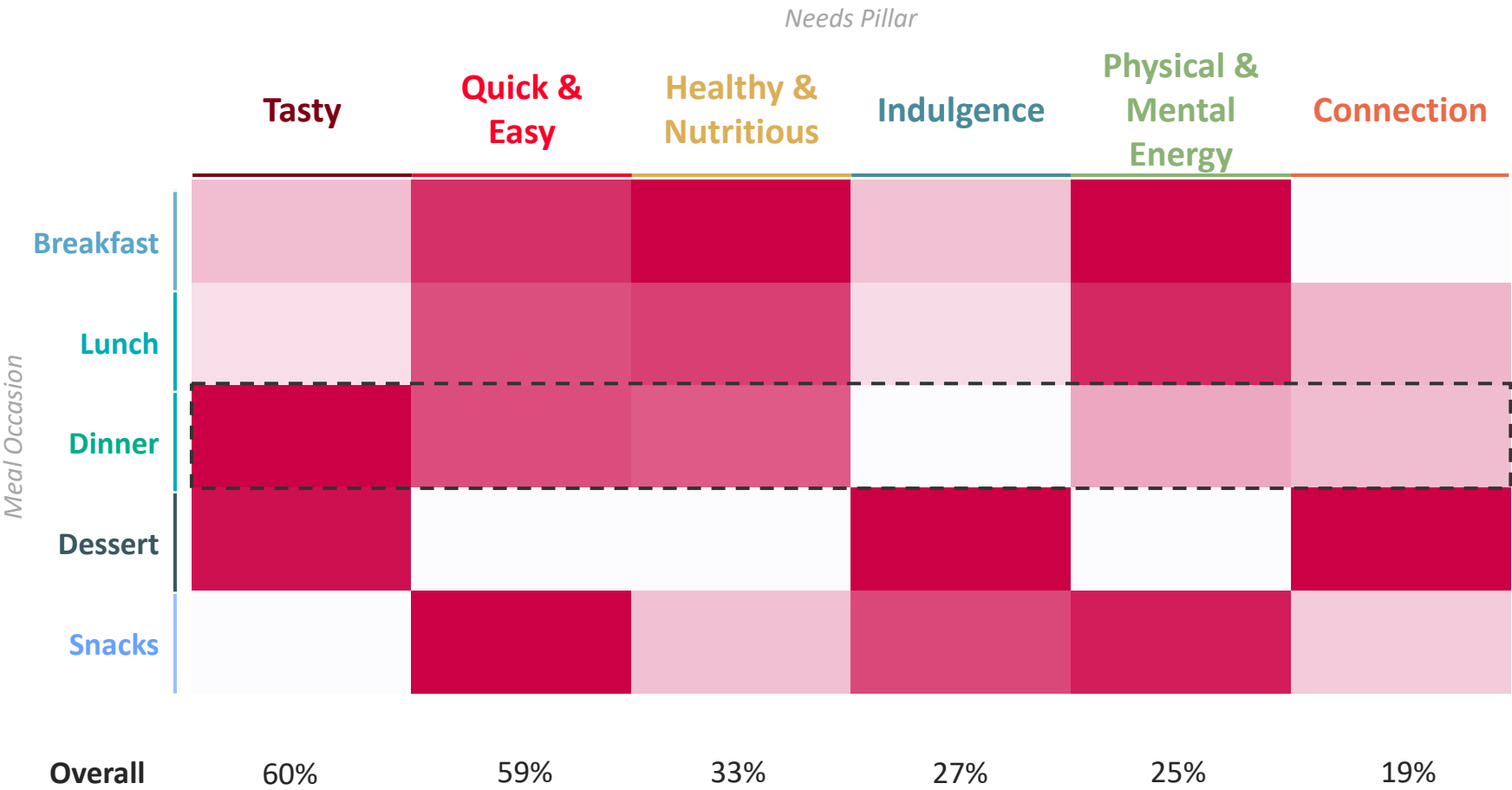
✓ What it is

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



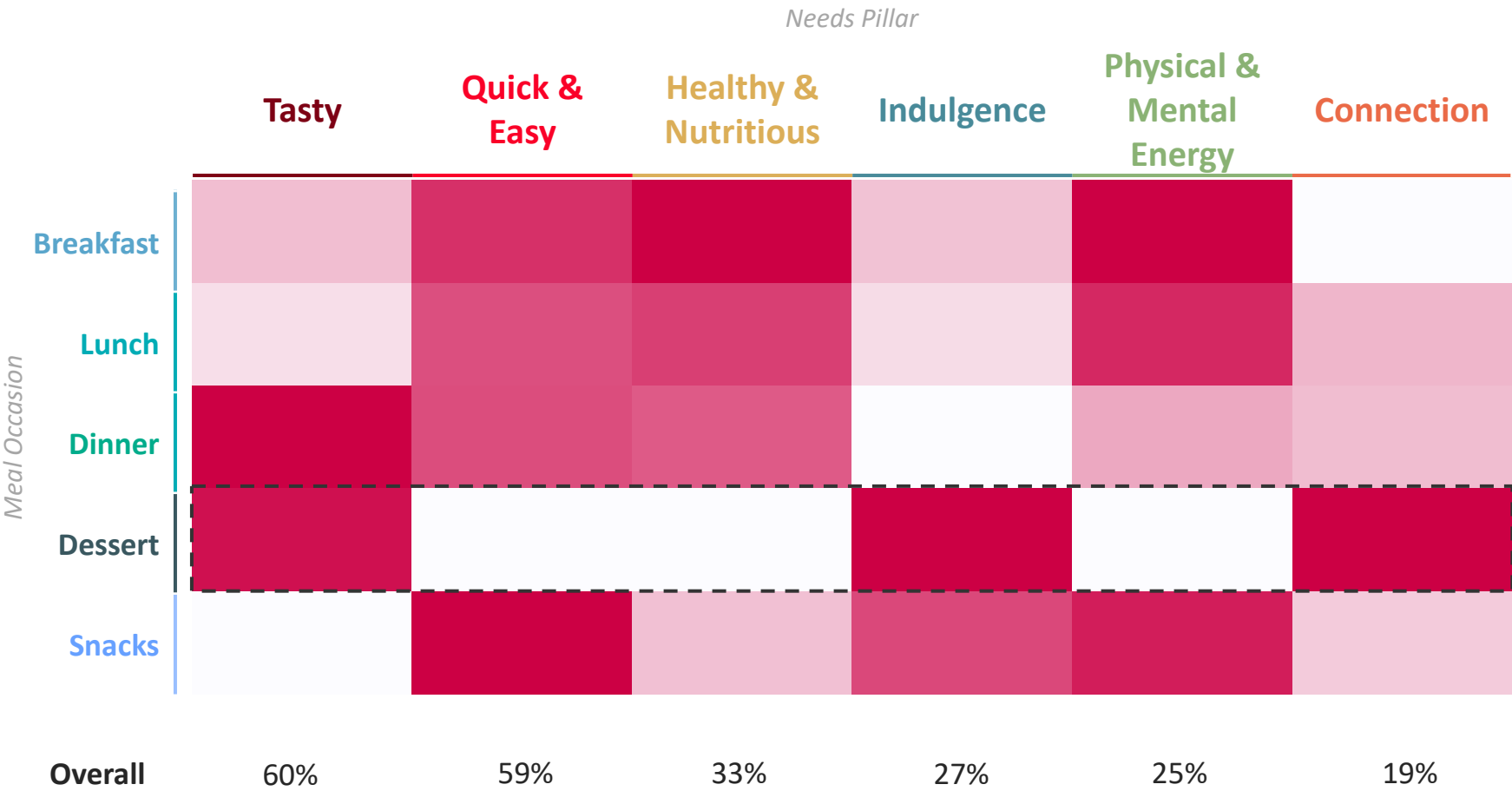
✓ What it is


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*



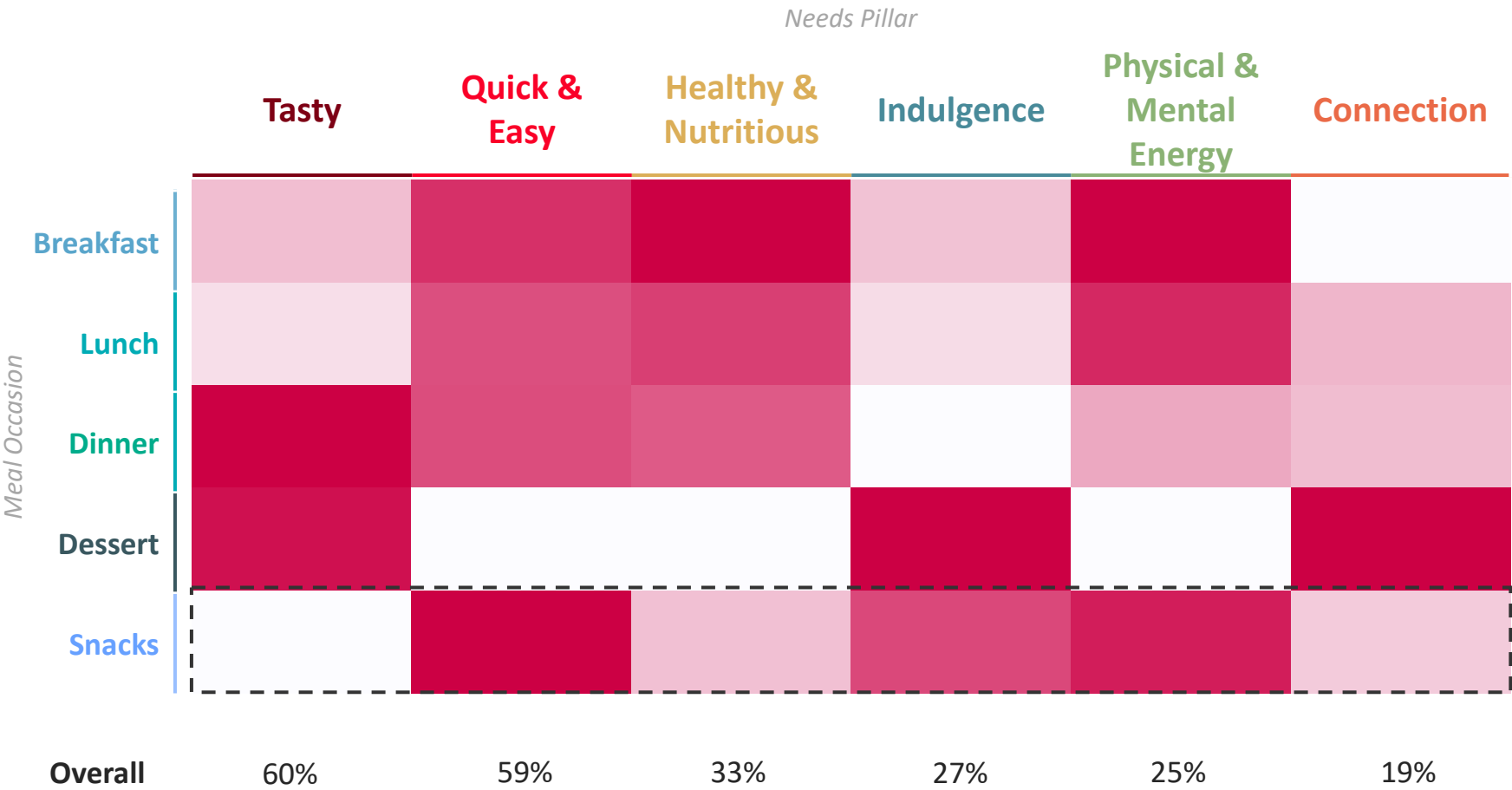
 **What it is**

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