

Final report

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Hort IQ Usage and Perceptions Tracker 2023-24

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Public summary

The Hort IQ Usage and Perceptions Tracker is a continuous monitor of Australian consumer attitudes and behaviours relating to fresh produce. Its aim is to provide Hort Innovation and its associated stakeholders with a view on important consumer metrics, which can inform strategic decisions.

The tracker consists of a monthly 15-20 minute survey of n=800 Australian main grocery buyers, per month. The sample was weighted to be nationally representative (by gender, age, and location) and reduce demographic bias. The survey consisted of a core module which captured...

- Purchase behaviour, e.g. commodities that have been purchased recently
- Future intentions, e.g. commodities that are intended to buy
- Attitudes to the category and to specific commodities
- Demographic and profiling variables
- Reactions to commodity campaigns in market
- Attitudes and behaviours relating to key topics of interest, e.g. sustainability, dining out, snacking

By capturing this knowledge and tracking it over time, this program has helped the Hort Innovation marketing team make key decisions on marketing strategy, including level of campaign investment, key motivations to communicate, and packaging. The program also provides important thought leadership to the fresh produce industry, by highlighting notable trends and issues that might improve the industry's overall understanding of the consumer landscape.

The program produced a number of reports flowing from these campaign and thought leadership investigations, along with capturing the overarching learnings and trends in consumer attitudes and behaviour. These reports are accessible within Hort IQ.

Keywords

Consumer behaviour, consumer attitudes

Introduction

The Hort IQ Usage and Perceptions Tracker (HIQUPT) is a program born of the need to empower strategic decisions with consumer-led insight. It ensures that strategic decisions, particularly marketing decisions are based on genuine consumer data and information.

Prior to the program, Hort Innovation recognized that there was a paucity of data on consumer attitudes, behaviours, and trends. This program aimed to address that need by regularly capturing key consumer metrics and monitoring them over time.

Methodology

The methodology encompassed a 20 minute online survey to capture these consumer metrics. There was approximately n=800 survey respondents for every month of the program, defined as...

- 18-75 years of age
- All to be main or joint grocery buyers
- Sample to be nationally representative by age, gender, and location (both metro/regional, as well as by state)

The survey covered over 30 commodities and captured key metrics (in the Core Module) including...

- Consideration – Which of the 33 produce categories across tiers 1,2 and 3 would consumers consider buying in the future?
- HH Usage – Which of the following produce categories have consumers used in the last 7 days?
- Usage Frequency: Of the produce items used in the last 7 days, how often are consumers using them?
- Consumption & Occasion: Who is consuming each produce type and when (e.g. solo snacking vs family meal, etc)?
- Future Usage or Purchase intent: How likely are consumers to use / buy each category in the next 7 days?
- Drivers (reasons) of Purchase: Why did you buy that produce type?
- Experience: How satisfied were you and did you think it was worth what you paid for?
- Barriers: Which factors explain why you haven't bought produce?
- Unprompted and prompted campaign awareness across a selection of categories

In addition to the Core Module, we conducted a series of ad hoc modules that allowed us examine key strategic areas and topics of interest. This included...

- Banana Campaign Deep Dive (Jan 2024)
- Mango Campaign Deep Dive (Jan 2024)
- Review of Australians' snacking behaviours (Feb 2024)
- Mushroom Campaign Deep Dive (Mar 2024 and Sep 2024)
- Analysis of the Impact of Cost of Living Pressures on Fresh Produce Consumption (Apr 2024)
- Analysis of Australians' dining out behaviours (Oct 2024)
- Apples Campaign Deep Dive (Nov 2024)
- Avocados Campaign Deep Dive (Dec 2024)

Data analysis was conducted by Fiftyfive5 with key insights presented, coupled with recommendations on optimising Hort Innovation strategy and execution.

Results and discussion

Our work had a particular focus on communications strategy and an analysis of the findings from the Core Module, as well as the campaign deep dives resulted in three key learnings / implications for future campaigns:

1. **Our top categories are usually on the shopping list but are limited in occasions:** Thinking about the biggest categories (e.g. bananas, avocados, apples), they are generally high on purchase intention so the challenge is how we expand beyond traditional occasions
2. **How do we say something new without getting too "science":** A lot of work we do is understanding claims that may resonate, particularly health claims. Some of them genuinely surprise but most people don't want a lecture and just appreciate fresh produce is healthy
3. **Are we trying to target people who love cooking or not:** We've seen a real mix of campaigns that either target people who know what they're doing vs. don't. This has real implications for our need to inspire vs. educate vs. reassure

Outputs

Program results are shared with industry through a series of webinars (list these) and reports which are available on demand through the Hort IQ consumer insights website. Additionally there is an interactive dashboard available on Hort IQ which provides industry with monthly updates by category across key tracking metrics. Communication deep dive reports are shared with industry Marketing SIAPs during Marketing strategy and planning workshops.

Table 1. Output summary

Output	Description	Detail
Core Module Report	A comprehensive report showing consumer attitudes and behaviours over time, published in May 2024	The report is available via Hort IQ and was presented to the marketing stakeholder team. It contains analysis of consumer behaviour and attitudes by commodity type, e.g. fruit, vegetables, and nuts. It further contains key consumption barriers and implications for key commodities (Bananas, Avocados, Pears, Apples, Mangoes, Mushrooms).
Banana Campaign Deep Dive Report	Analysis of campaign performance and impact for the relevant Bananas campaign	This report shows campaign performance based on our Drive framework, i.e. campaign awareness, comprehension of message take out, and impact of purchase intent. Campaign was shown to respondents to gauge additional diagnostic information, e.g. likeability, uniqueness. Recommendations were made based on campaign scores.
Mangoes Campaign Deep Dive Report	Analysis of campaign performance and impact for the relevant Mangoes campaign	This report shows campaign performance based on our Drive framework, i.e. campaign awareness, comprehension of message take out, and impact of purchase intent. Campaign was shown to respondents to gauge additional diagnostic information, e.g. likeability, uniqueness. Recommendations were made based on campaign scores.
Avocados Campaign Deep Dive Report	Analysis of campaign performance and impact for the relevant Avocados campaign	This report shows campaign performance based on our Drive framework, i.e. campaign awareness, comprehension of message take out, and impact of purchase intent. Campaign was shown to respondents to gauge additional diagnostic information, e.g. likeability, uniqueness. Recommendations were made based on campaign scores.
Apples Campaign Deep Dive Report	Analysis of campaign performance and impact for the relevant Apples campaign	This report shows campaign performance based on our Drive framework, i.e. campaign awareness, comprehension of message take out, and impact of purchase intent. Campaign was shown to respondents to gauge additional diagnostic information, e.g. likeability, uniqueness. Recommendations were made based on campaign scores.
Mushrooms Campaign Deep Dive Report	Analysis of campaign performance and impact for the relevant Mushrooms campaign	This report shows campaign performance based on our Drive framework, i.e. campaign awareness, comprehension of message take out, and impact of purchase intent. Campaign was shown to respondents to gauge additional diagnostic information, e.g. likeability, uniqueness. Recommendations were made based on campaign scores.
Snacking Report	Results from the Snacking ad hoc module	This report details the findings from the Snacking module conducted in February 2024. It shows snacking behaviour, associations, and barriers and outlines implications for driving further snacking behaviour amongst key commodities.

Cost of Living Report	Results from the Cost of Living ad hoc module	This report details the findings from the Snacking module conducted in April 2024. It shows consumer attitudes towards cost of living pressures and how they are managing them. It finishes with implications and recommendations from these attitudes for Hort Innovation.
Eating Out Report	Results from the Eating Out ad hoc module	This report shows the results from the Eating Out Module conducted in November 2024. It shows how consumer dining out behaviour has changed based on increased cost-of-living pressures and suggests how the fresh produce industry can grow as a result.
Sustainability Report	Results from the Sustainability ad hoc module	This report reports on attitudes, needs, and behaviours relating to sustainability. Conducted in August 2024, it shows the role and importance of sustainability in making purchase decisions around fruit and vegetables.
Monthly Highlight Summaries	One page reports, provided each month, that highlight a key piece of insight from the Core Module.	Each report highlights a key data point pertaining to a commodity or group of commodities. The report provides notable data findings coupled with commentary to engage key stakeholder groups.

Outcomes

Consumer usage and perception tracking is a foundational multi-industry investment supporting the development of demand creation through understanding and monitoring consumer behaviour, and supports the industry wide outcome 4: business insights.

More specifically, this workstream has helped to inform demand creation strategies by...

- Increased understanding of consumer purchase habits and behaviours
- A detailed prioritization of drivers and barriers to purchase
- Insight on how marketing initiatives, e.g. communications, have influenced consumer behaviour and preferences
- Benchmarking and comparing consumer metrics across fresh produce categories

In addition, this program has helped bring consumer insight to growers and other Hort Innovation stakeholders. Our work has featured in industry communications, conferences, and webinars. This has helped growers have a greater understanding of consumer behaviour challenges and input into strategic decisions.

A summary of the project's outcomes should be completed using the table below, supported with monitoring data collected to provide evidence of outcomes as per the project's M&E Plan. Where possible provide a statement of costs and benefits achieved in delivery of the project. For more information, refer to *Attachment A3: Final report guide* >

Table 2. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Access to and analysis of consumer insights to deliver against demand, supply and extension outcomes	Industry has easy to find information on the latest consumer trends preferences and attitudes.	Tracking results are provided in a user friendly dashboard, regular industry wide webinars are held with recordings and presentation copies available on Hort IQ. Individual campaign results are shared with Marketing SIAPs.	Over 6,000 unique users of Hort IQ consumer insights portal since inception in June 2024. All Marketing workshops contain consumer understanding as inputs to strategy development. Typical webinar attendance at 150+

Recommendations

Our program successfully increased knowledge of consumer attitudes and behaviours amongst Australian grocery buyers. To build on this program we recommend...

- Continuation of the program to further track these attitudes and behaviours over time
- Optimising deliverables to include more webinars that engage external audiences (i.e. outside of Hort Innovation)

Semi-qualitative deliverables, e.g. vox pop videos, to help stakeholders connect with key learnings.

Further, at the conclusion of this program, we conducted a thorough review of the program, including the questionnaire and deliverables. We recommend that any future program...

- Include further categories, e.g. nuts
- Explore new and emerging topics of interest, e.g. defining product quality, awareness of seasonality
- Expand existing topic areas to include developing ideas, e.g. how we view sustainability, evolution of cost-of-living as an issue

Intellectual property

'No project IP or commercialisation to report