Vegetracker: Wave 1

Presentation to:	David Chenu Domestic Marketing Manager Horticulture Australia Ltd March 2008

HAL
Know-how for Horticulture™

BRAND STORY
WHAT'S YOUR STORY?®

Presentation flow

- Exec Summary
- Key findings
  - Vegetable purchasing
  - Vegetable preparation & consumption
  - Diets and vegetables
  - Attitudes to vegetables
  - Kids and veg
- Summary

BRAND STORY
WHAT'S YOUR STORY?®

Background & Objectives

- Horticulture Australia has commissioned Brand Story, a leading research & brand consultancy to undertake research to measure a range of marketing metrics for vegetables.

- The overall aims of this research are to:
  - Track consumption, purchasing behaviour and category perceptions;
  - Track awareness of advertising campaigns and assess their effectiveness

The findings of this research will be used to assist Horticulture Australia in future strategic and creative development for vegetables.

Methodology & sample

- Online study: 17 minute survey length (average):
  - Main or sole grocery shopper for household surveyed

- Sample size = 600 per wave. Soft quotas on:
  - State
  - Age
  - Gender

  In line with ABS population stats

- Fieldwork for this first wave was conducted in February 2008
- Results from this wave are reported in this document
- Further wave to run in August:
  - Total sample of 1200 per year

Robust sample to establish & track trends

BRAND STORY

WHAT'S YOUR STORY?®

Quota sample composition

Base: All respondents

Gender		Wave 1 (600)
	Male	30%
	Female	70%
State	NSW	33%
	VIC	23%
	QLD	20%
	SA	13%
	WA	10%
Age	18-29 yrs	20%
	30-39 yrs	20%
	40-49 yrs	21%
	50-59 yrs	20%
	60 yrs +	20%

In-line with population statistics

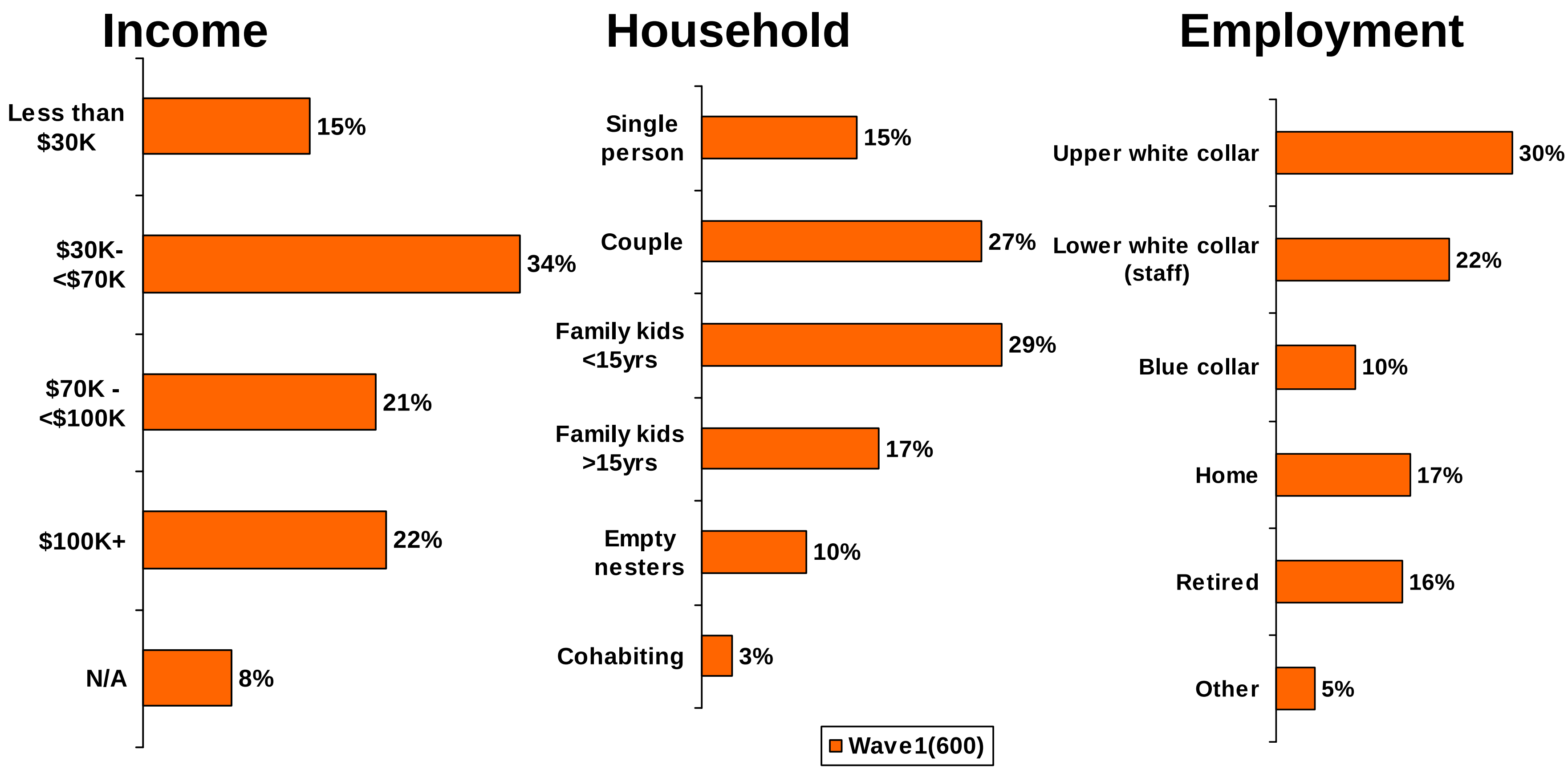
BRAND STORY

WHAT'S YOUR STORY?®

Sample

Q5-7: What is your household income, What is your household structure, Which of the following best describes your occupation

Base: All respondents



Good representation across key demographics

BRAND STORY

WHAT'S YOUR STORY?®

Key Take Outs

Key take-outs

- Almost all consumers have purchased vegetables in last 2 weeks
- Fresh vegetable purchasing is increasing and almost 60% state they have increased their consumption over the past 12 months

- Two groups of ‘staple vegetables’ emerge (that all households buy):
  - Primary (over 70% buy): Tomatoes, Potatoes, Carrots, Onion, Lettuce
  - Secondary (50-70% buy): Mushrooms, Broccoli, Capsicum, Pumpkin

- Different household structures have different relationships

  - **Mums:** High spend a function of the number of heads to feed, seeking supermarket convenience, need advice on storing vegetables and plan their shopping in advance
  - **Couples:** High spend a function of involvement with vegetables, like cooking and select their vegetables at point of sale, working around what is in season
  - **Singles:** Starting to catch up on consumption, but are limited by time and lack of interest in cooking. Big buyers of pre-prepared vegetables

Key take-outs cont.

- **Kids:** Boredom and dislike are the main barriers for vegetable consumption

- Key ways in which to overcome these barriers:
  - Raise interest of vegetables via new ways of serving
  - Integrate with day to day life (around the home/ adding to foods currently eaten)
  - Communication by TV cartoon characters is supported, but is this because this is what other products are doing?

- There is some emotional connection to vegetables (far less than fruit), an appreciation of their general health credentials and a need to eat five serves a day, but majority only eat 2-3 serves per day

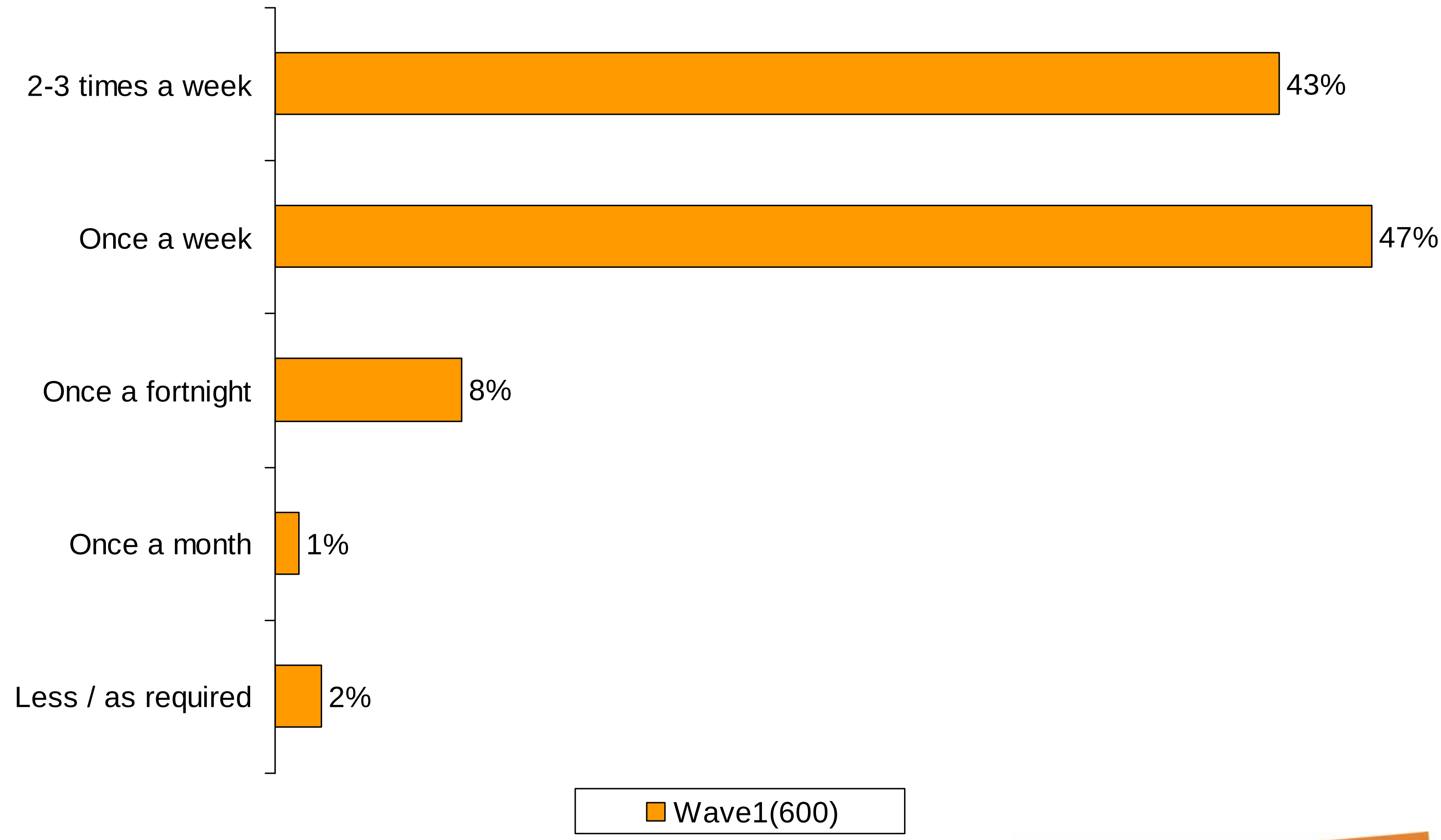
Consumers (adults and kids) need assistance, education and stimulation to further increase the consumption and perceived value of vegetables

Key Findings

Vegetable Purchasing

Frequency Of Vegetable Purchasing

Q11: Now thinking about fresh vegetables only - how often do you shop for fresh vegetables?
Base: All respondents



Almost all buy at least weekly, almost half buy 2-3 times per week

Characteristics of frequent purchaser groups

Q11
Base: All wave1 respondents

Buying weekly
(282)

More likely to be*:

- Male: 34% vs. 26%
- Single: 16% vs. 11%
- Lower income (<$30K):
  - 18% vs. 10%

***Compared to 2-3 time a week shoppers**

Convenience & budget driven?

2-3 times per week
(257)

More likely to be*:

- Female: 74% vs. 66%
- Young Families: 32% vs. 27%
- Couples: 29% vs. 25%
- Upper white collar: 35% vs. 26%

***Compared to weekly shoppers**

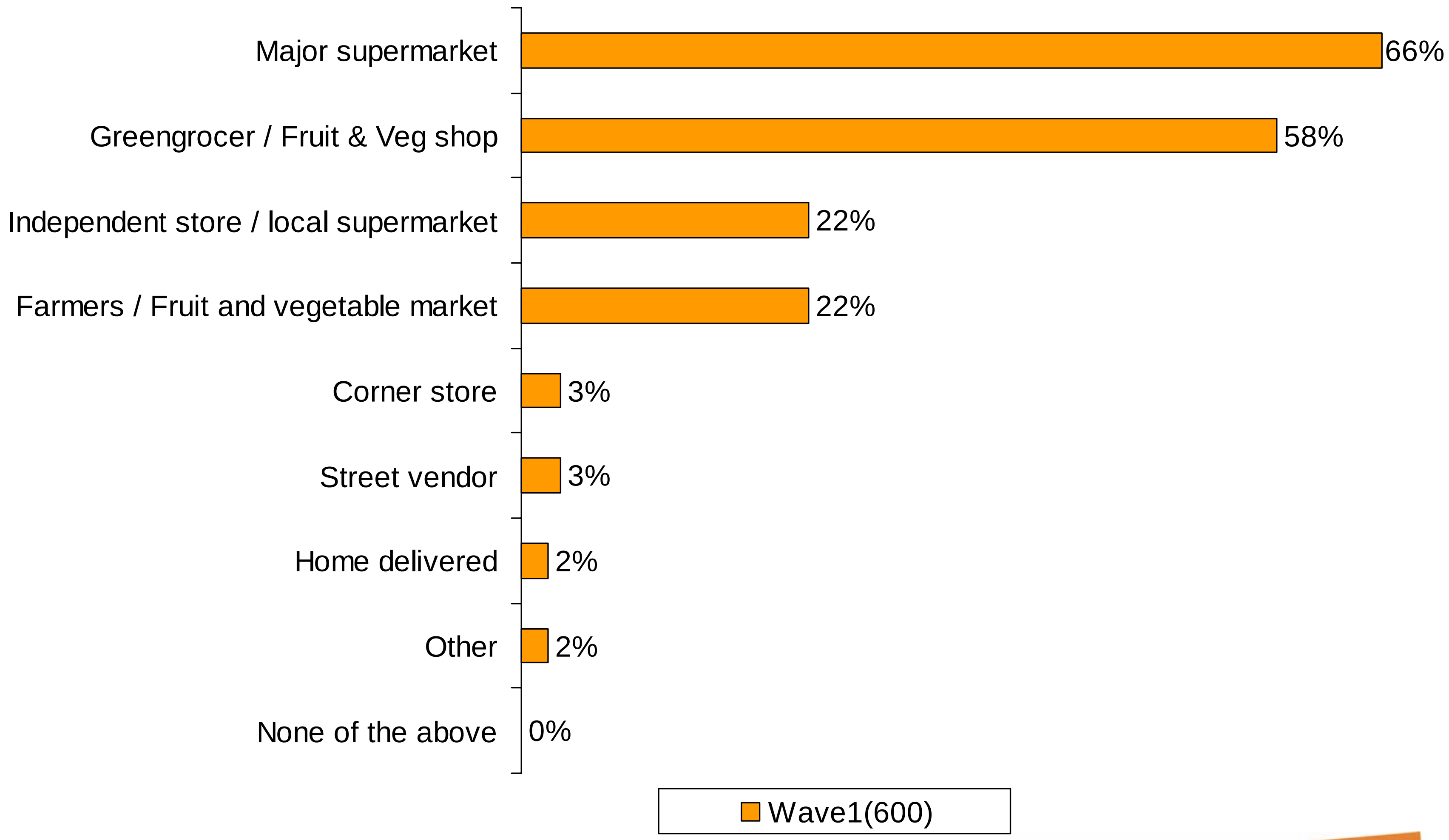
Food-involved and families

Income, household consumption rate and time have a part to play in shopping frequency

BRAND STORY
WHAT'S YOUR STORY?®

Location of vegetable purchasing

Q12 Where do you usually purchase fresh vegetables?
Base: All respondents



Part of the main shop for many, but a similar % buy through greengrocers

WHAT'S YOUR STORY?®

Characteristics of shoppers

Q12
Base: All wave1 respondents

Major Supermarket

(397)

More likely to be*:

- Families with children <15 yrs:
  - 31% vs. 25%

***compared to greengrocer shoppers**

Time poor?

Greengrocer

(349)

More likely to be*:

- Couples without kids:
  - 30% vs. 26%

***compared to supermarket shoppers**

Food involved

Household demographic is main difference
… family convenience vs. couple foodies?

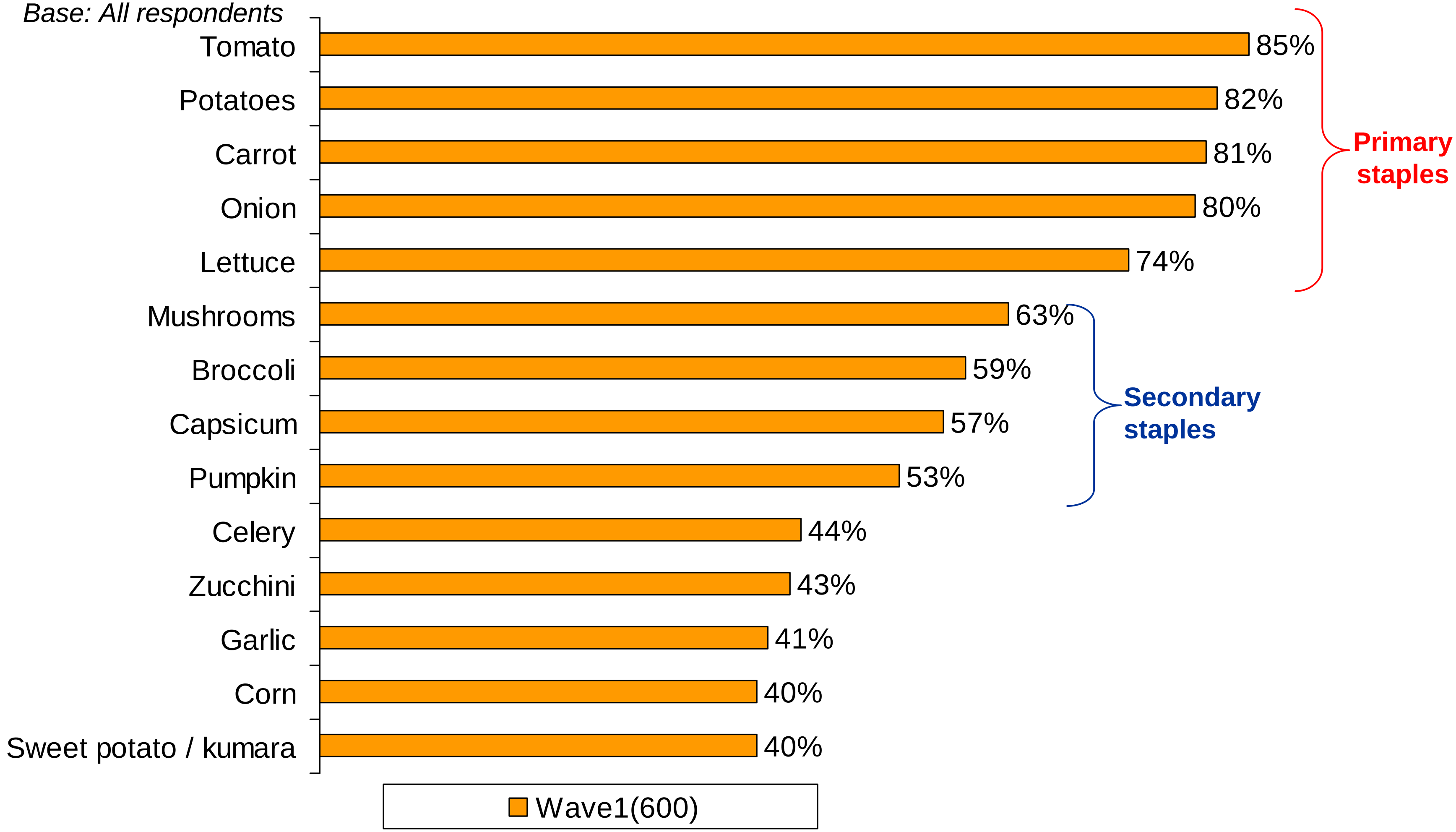
BRAND STORY

WHAT'S YOUR STORY?®

Vegetables Purchased Over Last 2 Weeks

All Vegetables With 40%+ Mentions

Q15: Which of the following fresh vegetables have you purchased in the past TWO WEEKS?
Base: All respondents



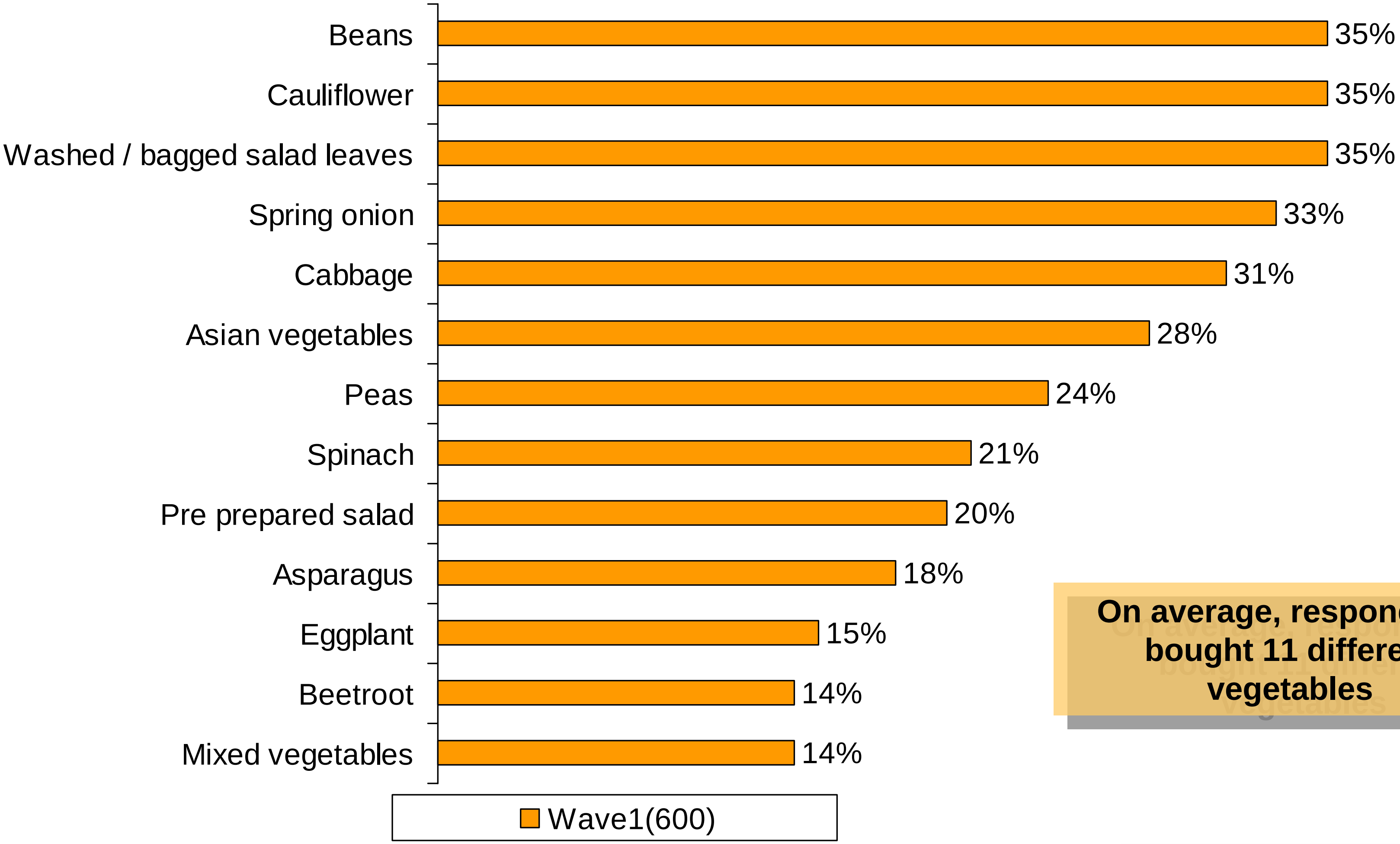
Tomatoes, potatoes, carrots, onion & lettuce lead the way, followed by mushrooms, broccoli, capsicum & pumpkin. The staples.

WHAT'S YOUR STORY?®

Vegetables Purchased Over Last 2 Weeks

All Vegetables With Less Than 40% Mentions

Q15: Which of the following fresh vegetables have you purchased in the past TWO WEEKS?
Base: All respondents



On average, respondents bought 11 different vegetables

Salad, crucifers, roots, mixed vegetables & prepared vegetables bring up the rear.

Vegetables purchased over last 2 weeks

Average # of vegetables purchased by household type

Q15: Which of the following fresh vegetables have you purchased in the past TWO WEEKS? Base: All respondents

Main skews are bolded	**All households**	**Single person household**	**Couple household no children**	**Family with eldest child under 15 at home**	**Family with eldest child over 15 at home**	**Family with children not living at home**
Avg. # veg. purchased	11.7	8.4	12.0	12.9	11.9	12.0
The average shopping basket Top 12 veg. purchases in order of decreasing % of mention	Tomato Potatoes Carrot Onion Lettuce Mushrooms Broccoli Capsicum Pumpkin Celery Zucchini Garlic	Tomato Potatoes Carrot Onion Lettuce Mushrooms **Capsicum** Broccoli Pumpkin **Garlic** Celery Zucchini	Tomato Potatoes **Onion** Carrot Lettuce Mushrooms Broccoli Capsicum Pumpkin **Sweet potato / kumara** Garlic Celery	**Potatoes** **Carrot** Tomato Onion Lettuce Mushrooms **Capsicum** Broccoli **Zucchini** Pumpkin **Corn** Celery	Tomato **Carrot** **Lettuce** Potatoes Onion **Broccoli** Mushrooms Pumpkin Capsicum Celery Garlic **Washed / bagged salad leaves**	**Onion** **Carrot** Potatoes Lettuce Tomato Mushrooms **Pumpkin** Capsicum Broccoli **Cauliflower** **Sweet potato / kumara** Celery

Most households buy 12 different vegetables.
All buy the staples, but order of purchase incidence changes with household type.

BRAND STORY
WHAT'S YOUR STORY?®

Vegetables purchased over last 2 weeks

Average # of vegetables purchased by channel, frequency

Q15: Which of the following fresh vegetables have you purchased in the past TWO WEEKS?
Base: All respondents

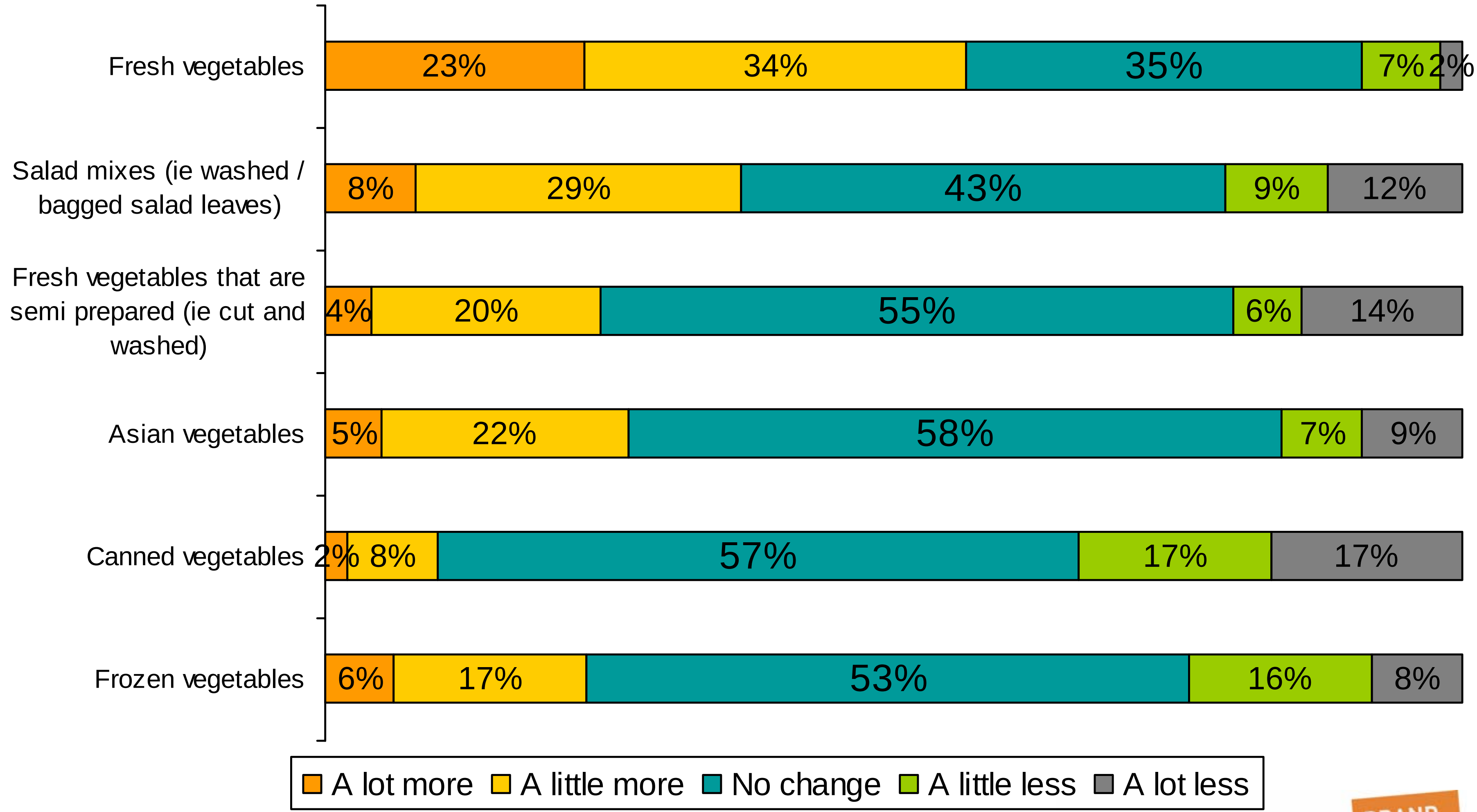
	All households	Greengrocer shopper	Supermarket shopper	Weekly shopper	Shop 2-3 times a week
Avg. # veg. purchased	11.7	12.2	11.2	10.7	13.6
The average shopping basket Top 12 veg. purchases in order of decreasing % of mention	Tomato Potatoes Carrot Onion Lettuce Mushrooms Broccoli Capsicum Pumpkin Celery Zucchini Garlic	Tomato **Carrot** Potatoes Onion Lettuce Mushrooms Broccoli Capsicum Pumpkin Celery Garlic Zucchini	Tomato Potatoes Carrot Onion Lettuce Mushrooms Broccoli Capsicum Pumpkin Celery Zucchini **Corn**	Tomato Potatoes Carrot Onion Lettuce Mushrooms Broccoli **Pumpkin** Capsicum Celery Zucchini Garlic	Tomato **Carrot** **Onion** Potatoes Lettuce **Broccoli** Mushrooms Capsicum Pumpkin Celery **Corn** Zucchini

Those who shop at greengrocers, 2-3 times a week and who respond to what's in store (rather than plan) buy more types of vegetables

Trends in vegetable buying in wave 1

Changes over the last 12 months

Q14 For each of the following types of vegetable please indicate whether you are buying more or less of them compared to the same time one year ago. Base: All respondents

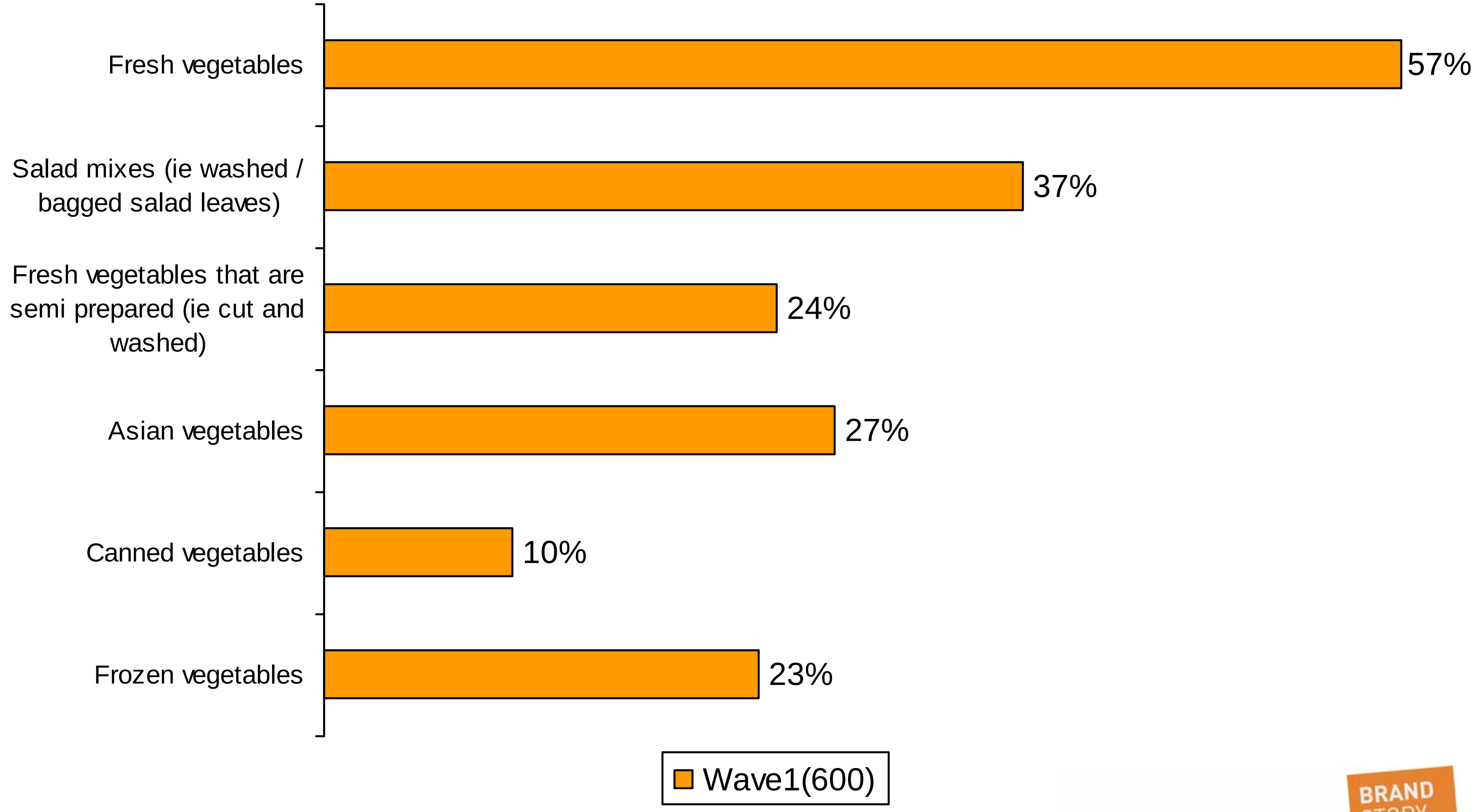


Fresh veg. purchasing appears to be on the up, but most categories remain unchanged.

Trends in vegetable buying: positive trends

All stating ‘A little more’ Or ‘A lot more’

Q14For each of the following types of vegetable please indicate whether you are buying more or less of them compared to the same time one year ago.
Base: All respondents



We will track these trends over time

Indicative characteristics of each buyer type

Those stating they are buying more of each type (vs. total sample)

Q14, Base: All respondents

Fresh Increasers (343)

- Male (33% vs. 30%)
- 25-29 yr olds (16% vs. 13%)
- $30K-$69K income (36% vs. 34%)
- Couples (30% vs. 27%)

Fitness firsts??

Frozen Increasers (139)

- Females (78% vs. 70%)
- 18-29 yrs (26%)
- 30-39 yrs (29%)
- $30K-$69K income (36% vs. 34%)
- Young families (35% vs.29%)
- Home duties (19% vs.17%)

Young mums

Canned Increasers (57)

- 30-39 yrs (41%)
- $30K-$69K income (41% vs. 34%)
- Young families (51% vs.29%)
- Lower white collar (28% vs. 22%)
- Shop 2-3 times a week (53% vs.43%)

Young mums & low income

Males & the young catching up to the 'fresh' trend.
Families & lower earnings buy longevity

Indicative characteristics of each buyer type

Those stating they are buying more of each type (vs. total sample)

Q14, Base: All respondents

Salad mix Increasers (221)

- Females (73% vs. 70%)
- NSW (37% vs.33%)
- Upper white collar (33% vs.30%)

Time-poor, $ rich

Asian veg. Increasers (158)

- Male (33% vs. 30%)
- $100K+ (25% vs. 22%)
- Couples (29% vs. 27%)
- Shop 2-3 times per week (56% vs. 43%)
- Greengrocer shoppers (65% vs. 58%)

Wealthy foodies

Prep. veg. Increasers (46)

- 18-29 yrs (31%)
- $30K-$69K (40% vs.34%)
- Upper white collar (32% vs. 30%)
- Blue collar (13% vs.10%)

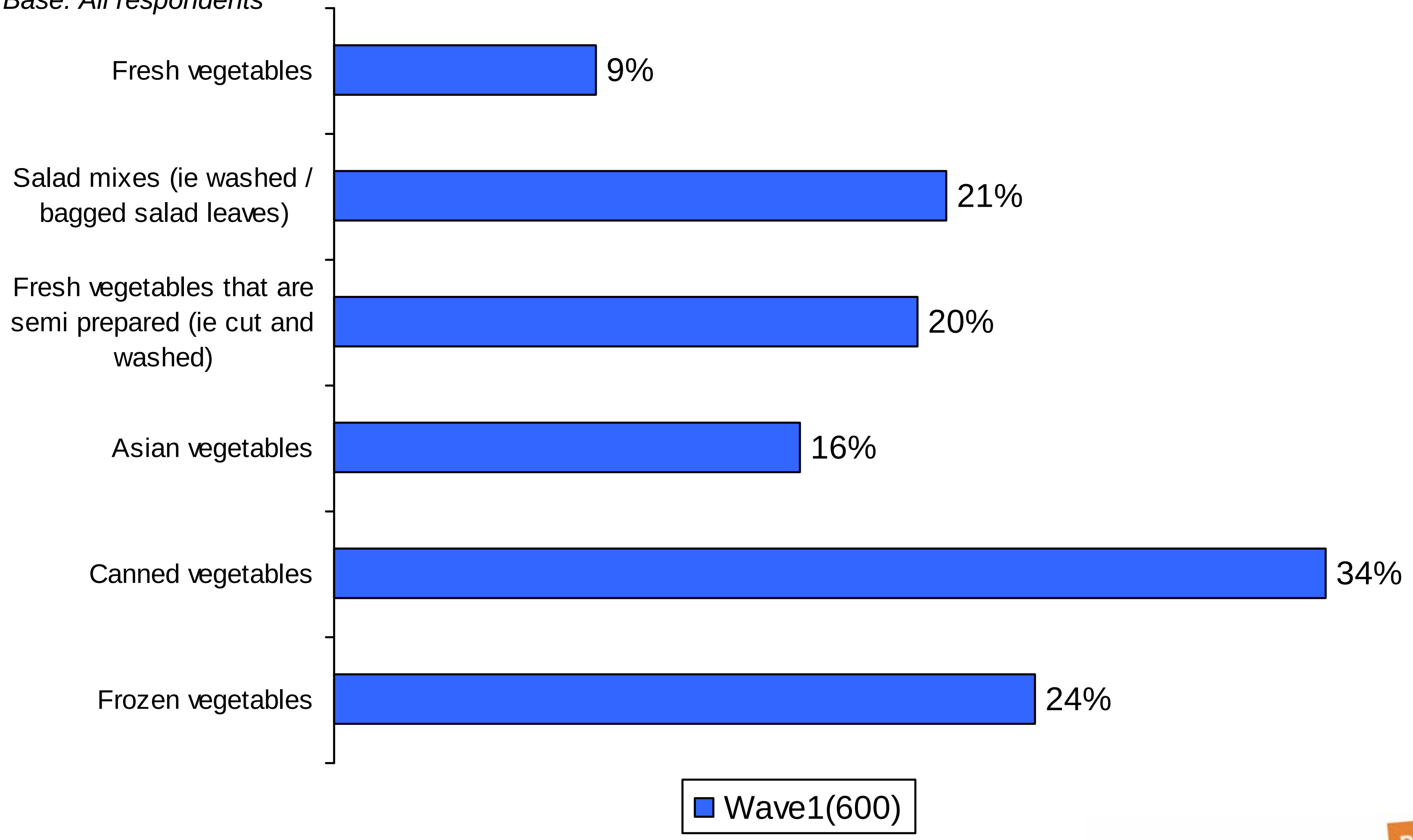
Time poor young employed

Money buys convenience and experimentation.

Trends in vegetable buying: Negative trends

All Stating ‘A little less’ Or ‘A lot less’

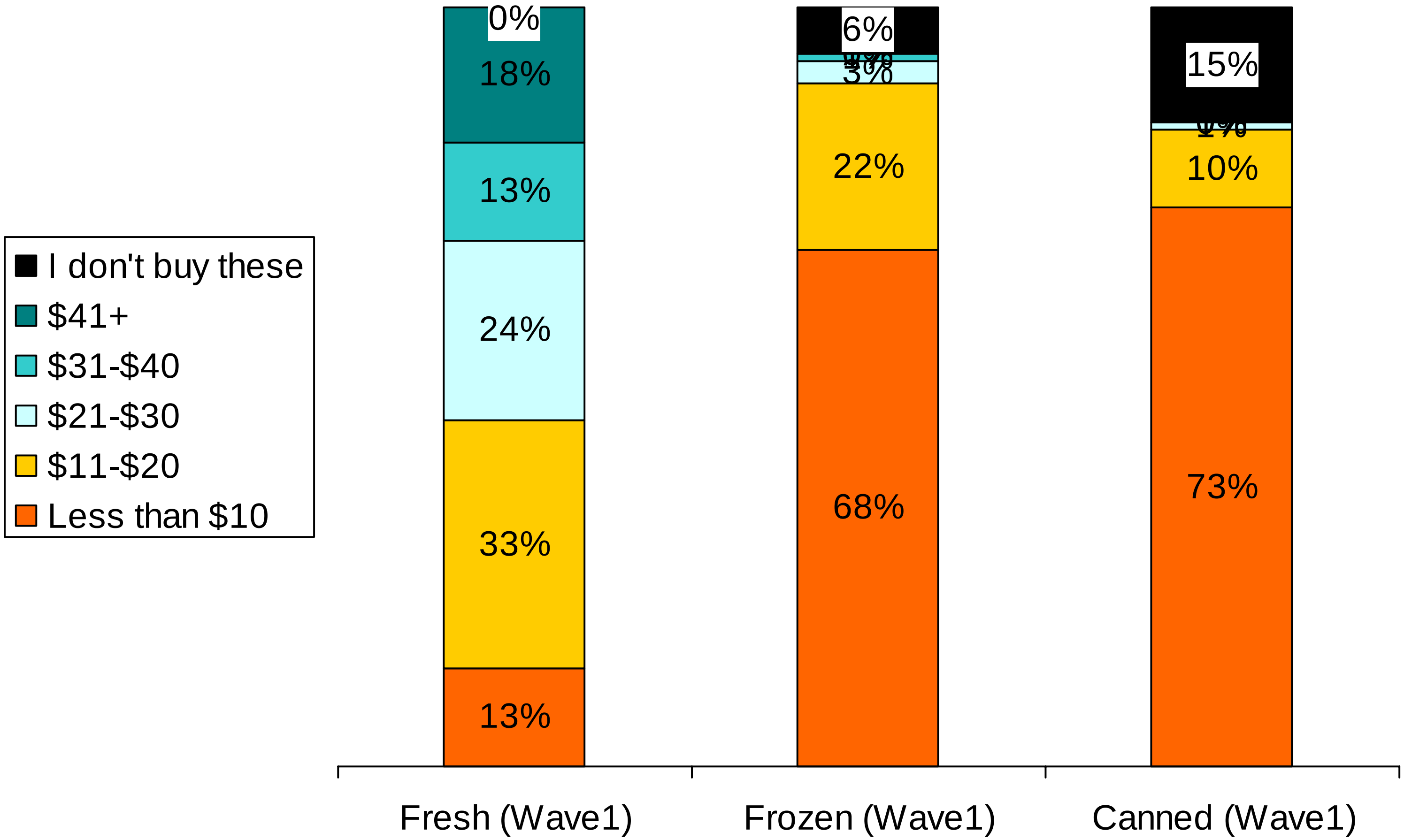
Q14For each of the following types of vegetable please indicate whether you are buying more or less of them compared to the same time one year ago.
Base: All respondents



We will track these trends over time

Average weekly spend on vegetables

Q10: Thinking about all vegetables you buy - be that fresh, canned or frozen - in an average week, how much would you spend on each type of vegetable for household consumption?
Base: All respondents



Modal spend: **$11-20** **<$10** **<$10**

In an average week, more money spent on fresh vegetables than frozen or canned.

Fresh Vegetable Purchasers In Focus

Q10
Base: All wave1 respondents

Low Spenders*

(77)

More likely than high spenders to be:

- Lower income (<$30K):
  - 35% vs. 17%
- Single person household:
  - 33% vs. 16%
- Lower white collar:
  - 29% vs. 21%

Low $ or low interest

***$10 or less**

High Spenders*

(105)

More likely than low spenders to be:

- Higher income (>$100K):
  - 44% vs. 8%
- Family:
  - Kids <15yrs: 38% vs. 18%
  - Kids >15yrs: 20% vs. 9%
- Upper white collar:
  - 51% vs. 16%

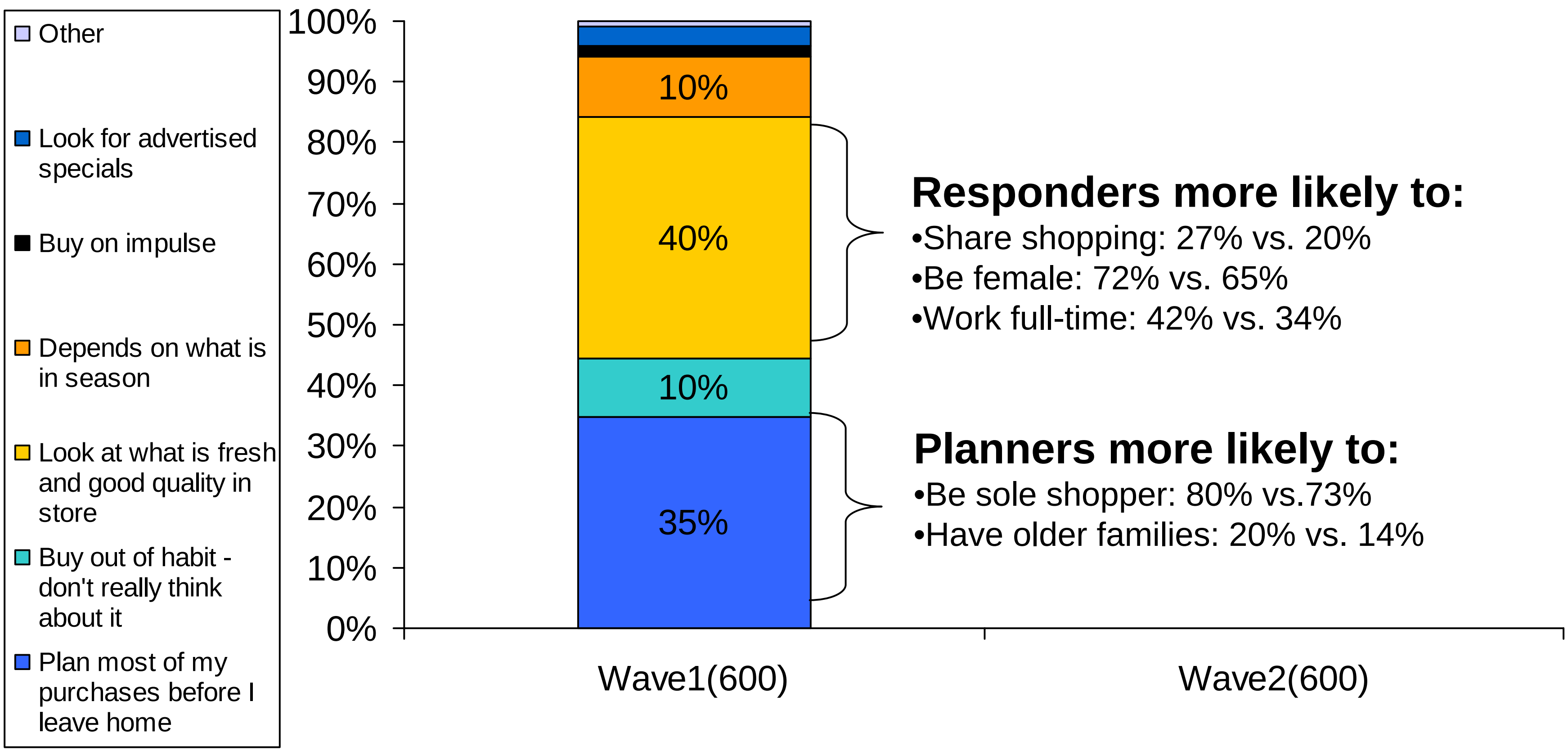
High $ or high volume

***$41+**

Higher spend is driven by need (large family)
& by ability (higher income)

Approaches to vegetable buying

Q13 Which of the following best describes how you usually buy fresh vegetables?
Base: All respondents

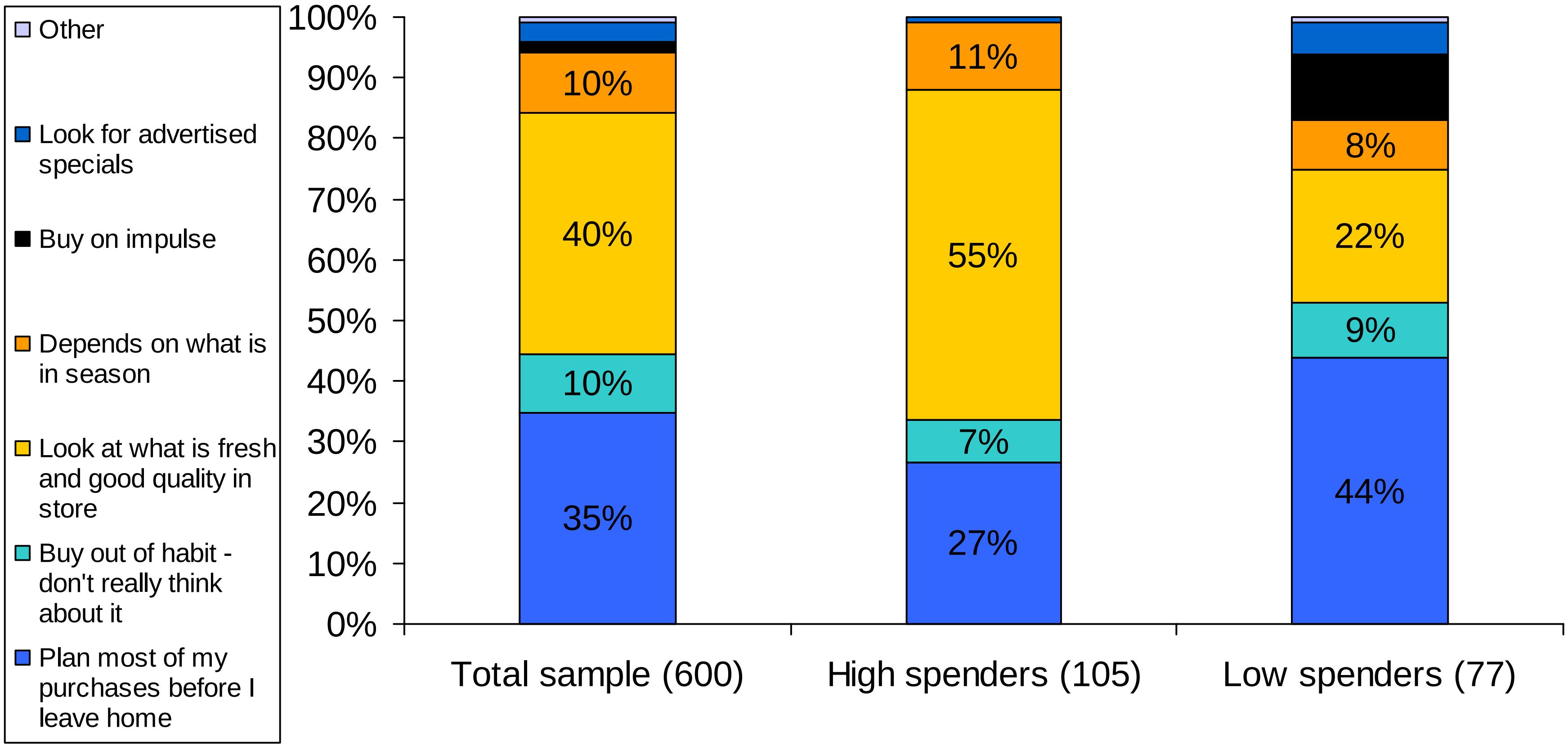


It is clear that vegetable buying is not habitual.
Two groups emerge – those who respond to the quality of vegetables in-store and those who plan before they shop

Approach to vegetable buying by spend

Those spending $41+ on fresh veg. vs. those spending <$10

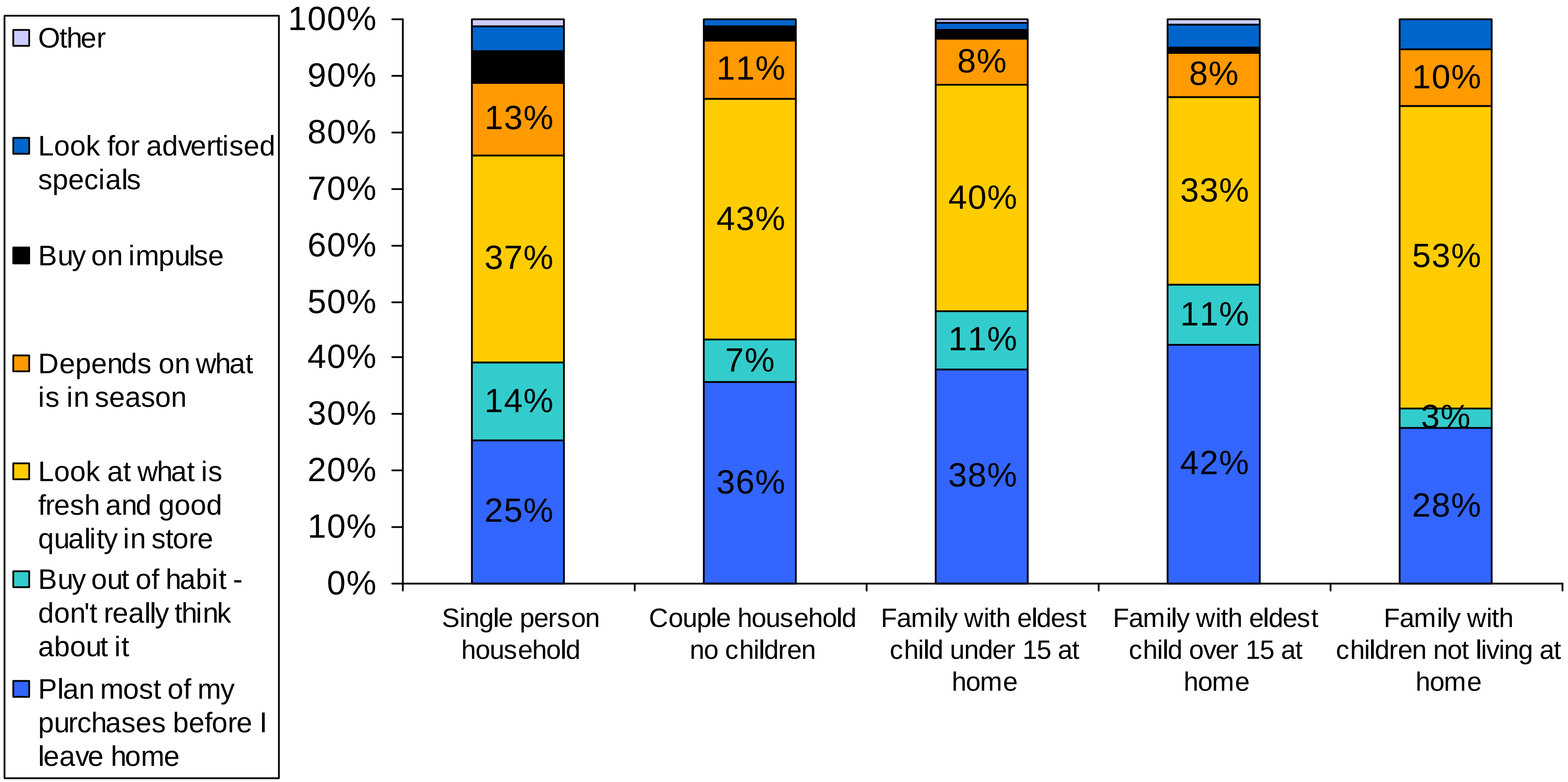
Q13, Q10
Base: All respondents



Unsurprisingly, low spenders are more likely to plan their shopping trip & high spenders to respond to the in-store environment

Approach to vegetable buying by household

Q13
Base: All respondents



Families plan…catering to needs & budget?
Couples & empty nesters respond to what is in-store
…risk takers? More experiential?

Vegetables purchased over last 2 weeks

Average # of vegetables purchased by spend and approach

Q15: Which of the following fresh vegetables have you purchased in the past TWO WEEKS?
Base: All respondents

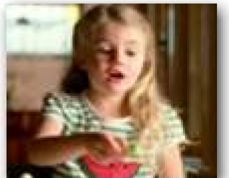
Skews have been bolded	All households	Planner	Responder	High spend	Low spend
Avg. # veg. purchased	11.7	11.3	12.6	14.8	6.4
The average shopping basket Top 12 veg. purchases in order of decreasing % of mention	Tomato Potatoes Carrot Onion Lettuce Mushrooms Broccoli Capsicum Pumpkin Celery Zucchini Garlic	Tomato **Onion** Potatoes Carrot Lettuce Mushrooms Broccoli Capsicum Pumpkin Celery Sweet potato / kumara Zucchini	Tomato Potatoes Carrot Onion Lettuce **Broccoli** Mushrooms Capsicum Pumpkin **Zucchini** Sweet potato / kumara Celery	Tomato Carrot Lettuce Potatoes Onion Mushrooms **Capsicum** Broccoli Pumpkin Celery Zucchini Garlic	Potatoes Tomato **Onion** Carrot Lettuce Mushrooms **Pumpkin** Capsicum **Sweet potato / kumara** Celery Broccoli **Washed / bagged salad leaves**

Low spenders focus on staples (families) & convenience (SINKS)

Unprompted awareness of advertising

Q9 Thinking about any advertisements that you may have seen for vegetables recently, can you please write down the types of vegetables you saw advertised and what the advertisements were about if you can recall?
Base: All wave1 respondents (600)

48% are aware of advertising for vegetables. Main mentions include:

Fresh food kids

The intent of making veg. fun and the five a day message came across. The imagery was well recalled:

"A little boy makes a vegetable man out of celery."

"A boy making a veg. rocket of celery stick, carrot and capsicum dipping this in a dip."

Most knew who was advertising:
"Woolworths"
"Safeway"

Go for 2 & 5

Many understood the message, some recalled imagery:

"The veg face, saying we can fit vet into our diets"

"Dame Edna caricature made of veg, lying about having 5 veg that day"

Woolworths, the fresh food people

Clearly 'veg' is linked to 'fresh' is linked to Woolworths

Veg brands

Bird's Eye 'Snap-frozen' peas: "*Locked in freshness*"

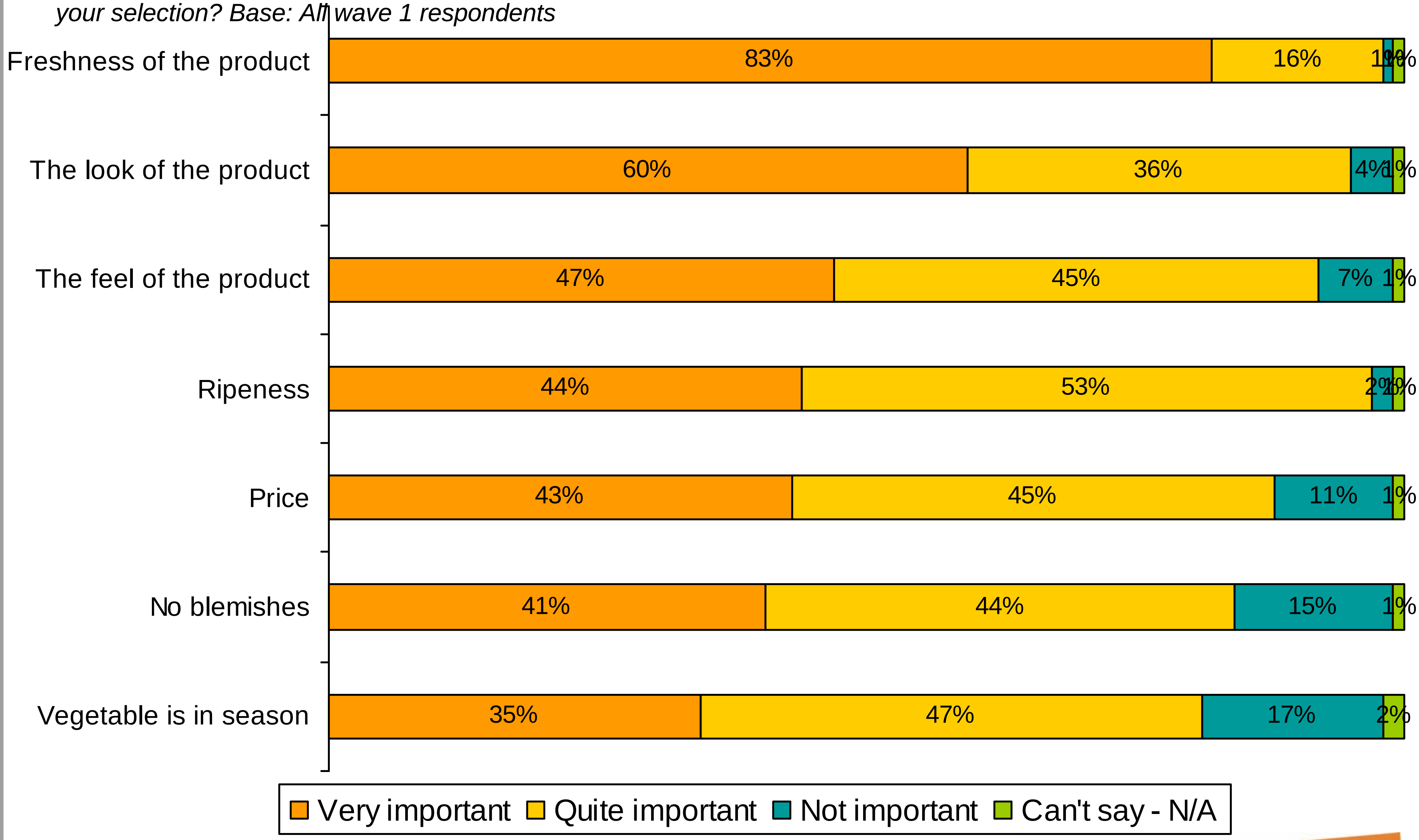
McCains frozen veg

A mix of specific & generic campaigns from retailers, government and processors.

Vegetable purchase criteria: Wave 1

Key criteria

Q16 When choosing fresh vegetables please indicate how important each of the following criteria is for helping you make your selection? Base: All wave 1 respondents

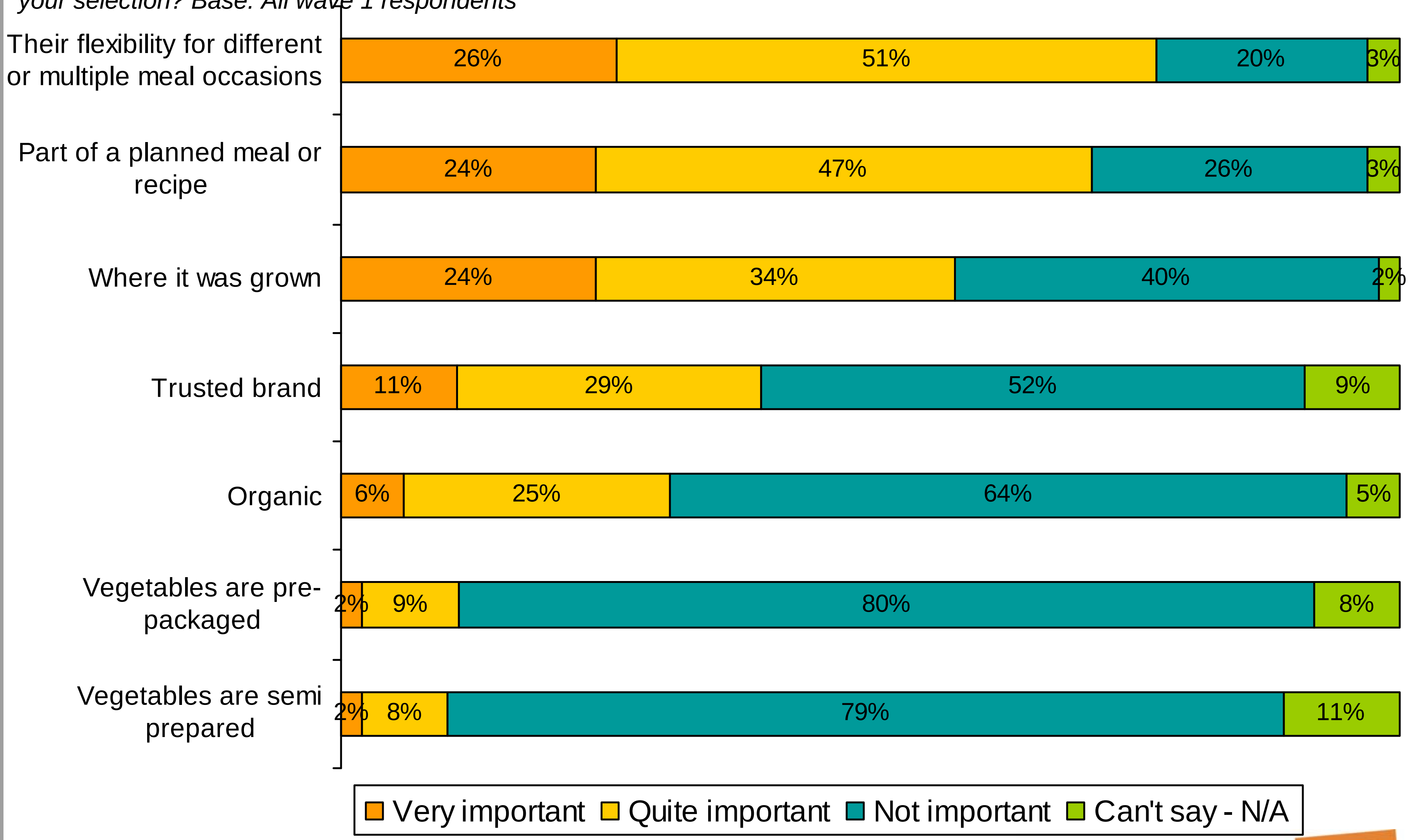


Freshness, look, feel and ripeness are fundamental.

Vegetable purchase criteria: Wave 1 (2)

Other criteria

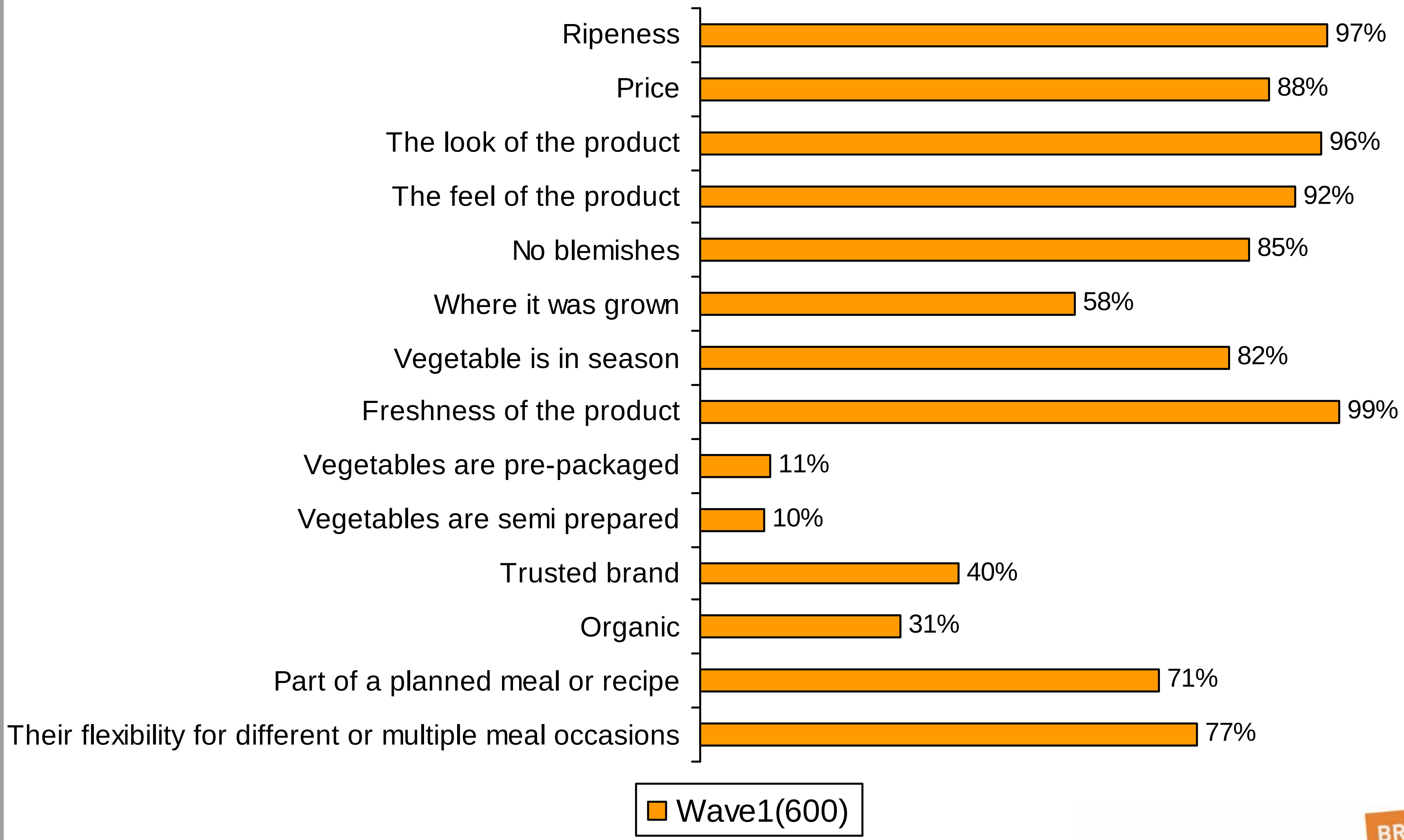
Q16 When choosing fresh vegetables please indicate how important each of the following criteria is for helping you make your selection? Base: All wave 1 respondents



Pre-prepared or Organic veg. are not key.

Vegetable purchase criteria:
All stating 'important' for the criteria tested

Q16 When choosing fresh vegetables please indicate how important each of the following criteria is for helping you make your selection? Base: All wave 1 respondents

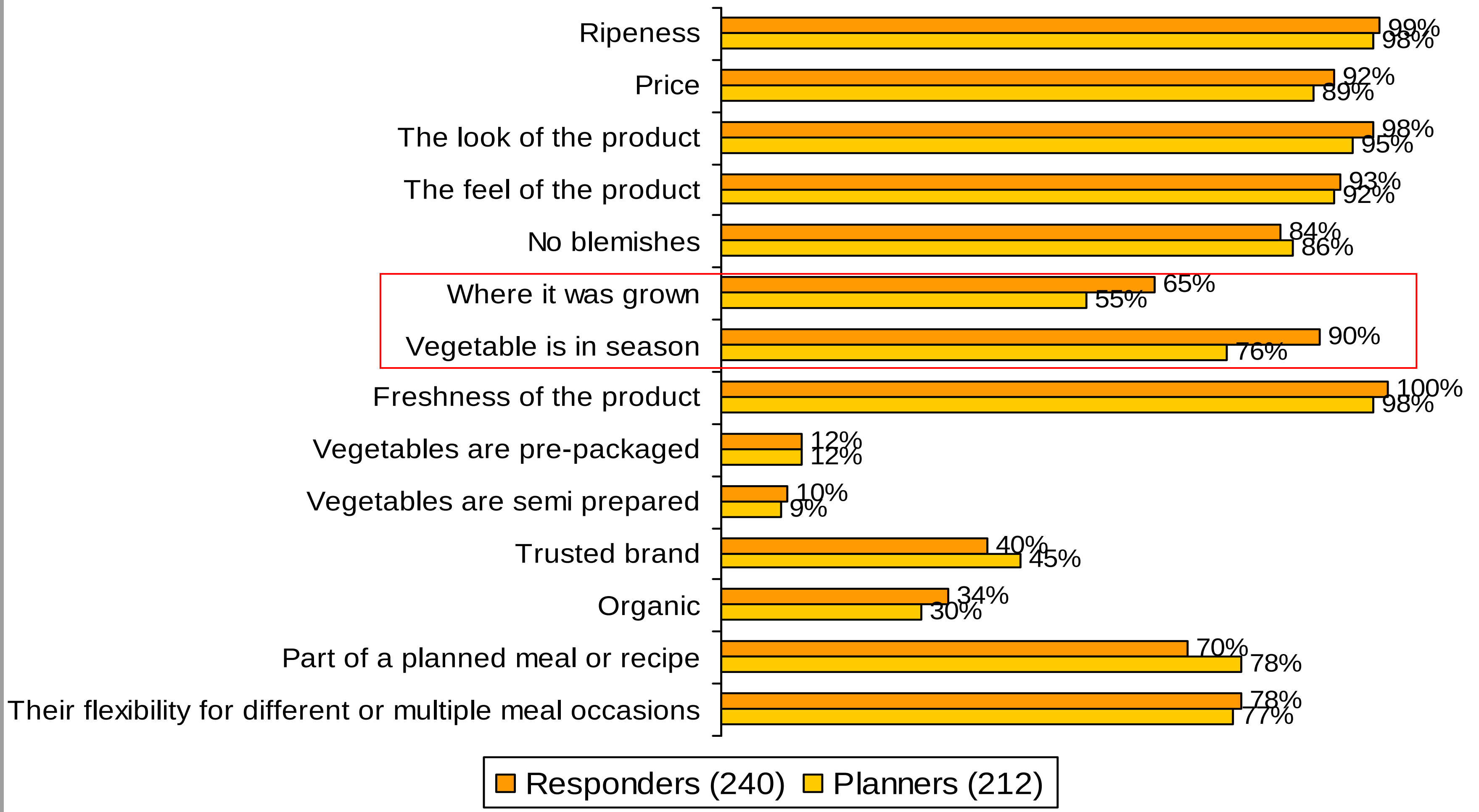


We will track purchase criteria over time.

Vegetable purchase criteria by approach

All stating ‘important’ for the criteria tested

Q16 When choosing fresh vegetables please indicate how important each of the following criteria is for helping you make your selection? Base: All wave 1 respondents



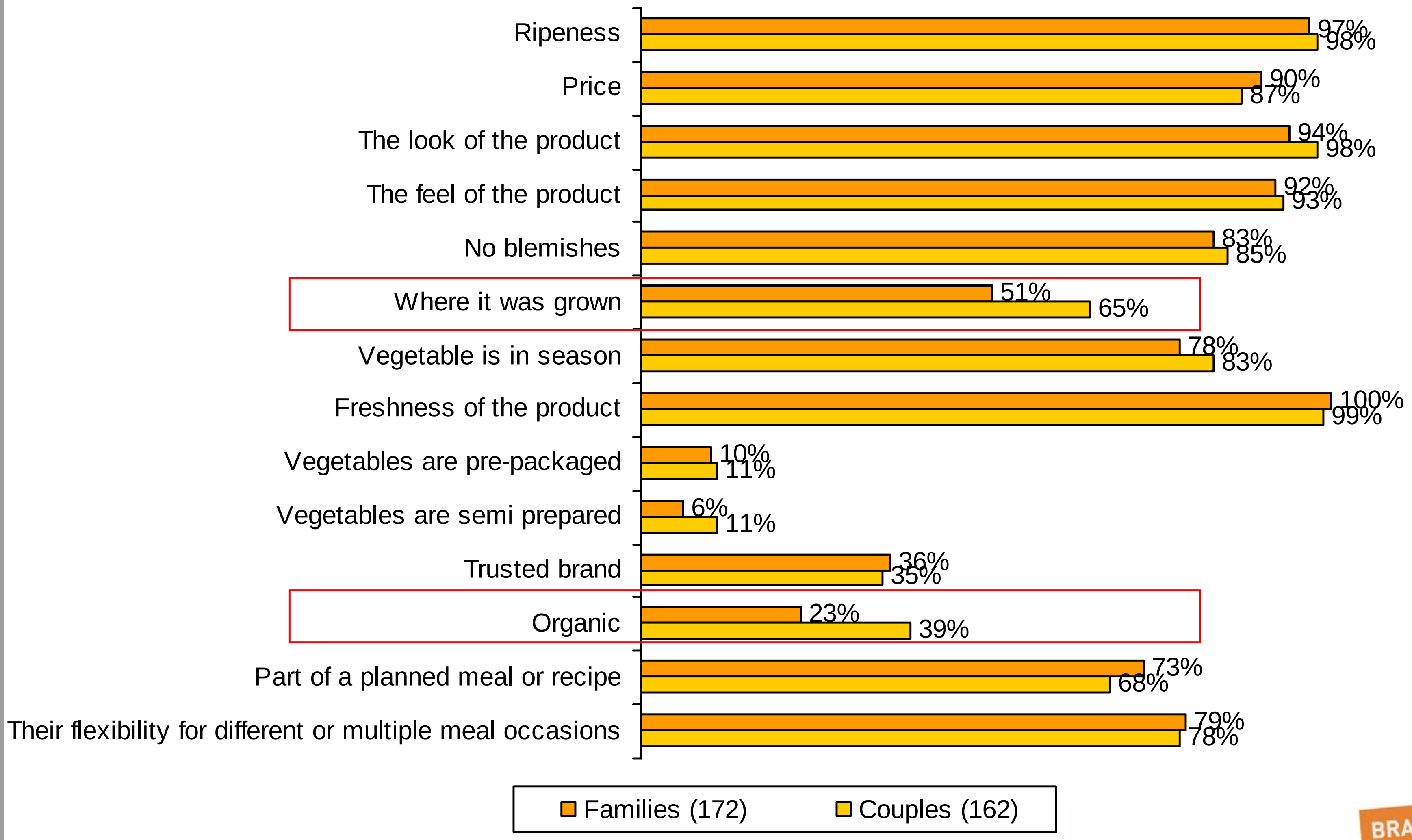
Responders working <u>with</u> what is available in terms of quality.
Planners <u>fit</u> the veg around a specific recipe.

BRAND STORY
WHAT'S YOUR STORY?®

Vegetable purchase criteria by household

All stating ‘important’ for the criteria tested

Q16 When choosing fresh vegetables please indicate how important each of the following criteria is for helping you make your selection? Base: All wave 1 respondents

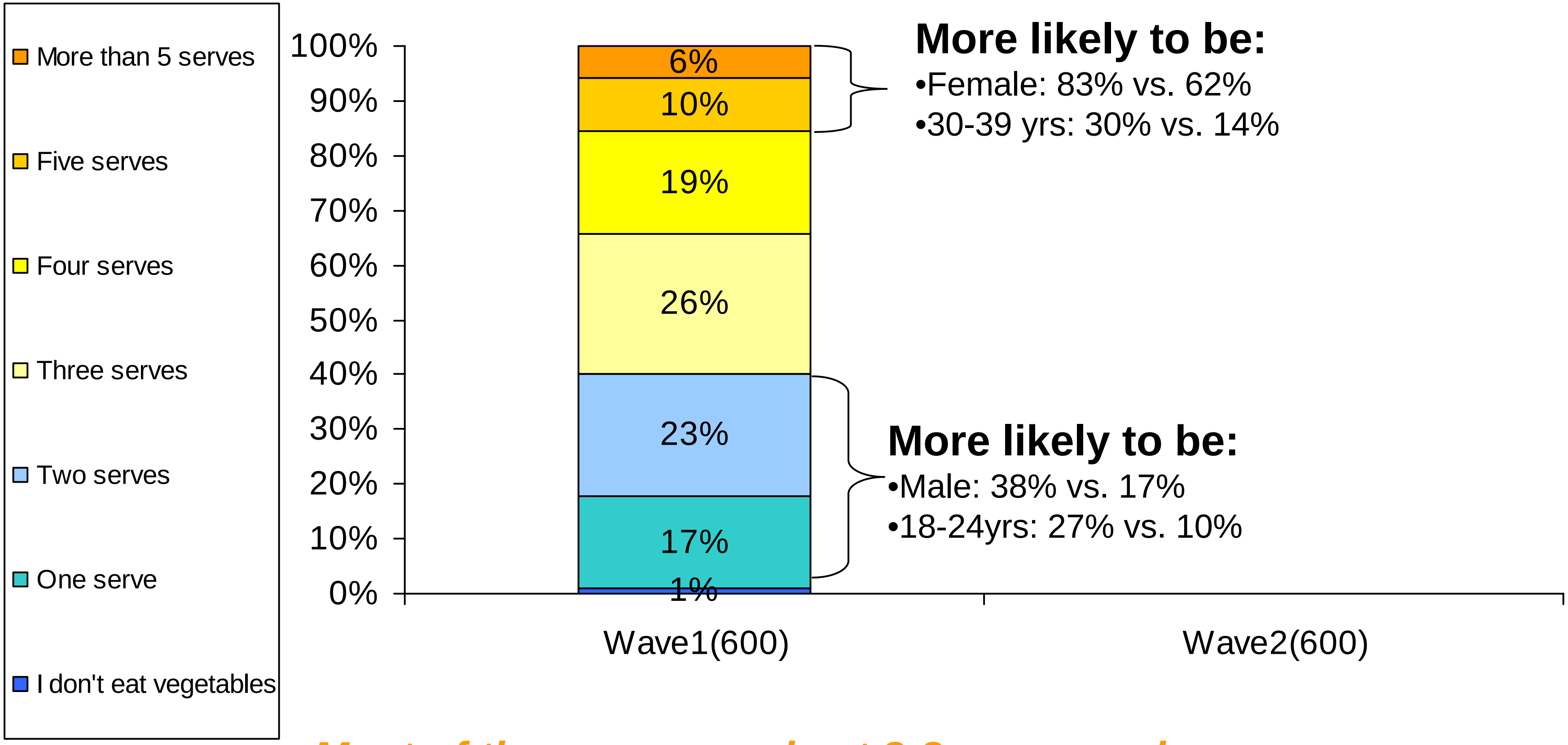


Couples more likely to seek organic veg. and to care where it is grown

Vegetable Preparation and Consumption

of fresh vegetable serves eaten per day

Q17 Consider an average day - how many serves of fresh vegetables would you eat per day? (e.g. one carrot or one tomato or one cup of lettuce = one serve)
Base: All respondents

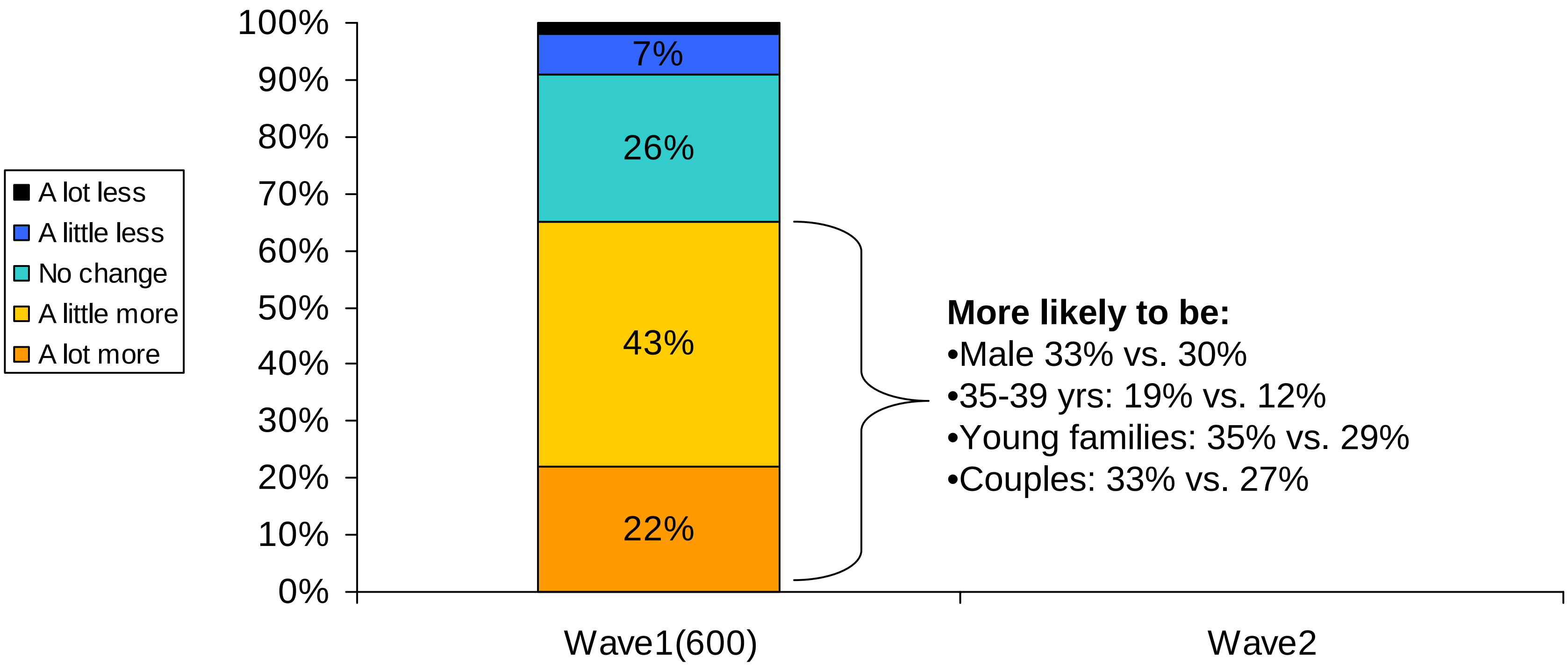


Most of those surveyed eat 2-3 serves a day.
Only 1 in 10 eat five.
Low consumption in young males

WHAT'S YOUR STORY?®

Consumption trend for vegetables

Q18 Thinking about your own consumption of vegetables please indicate on the following scale whether you are eating more or less vegetables today than you were 5 years ago
Base All respondents

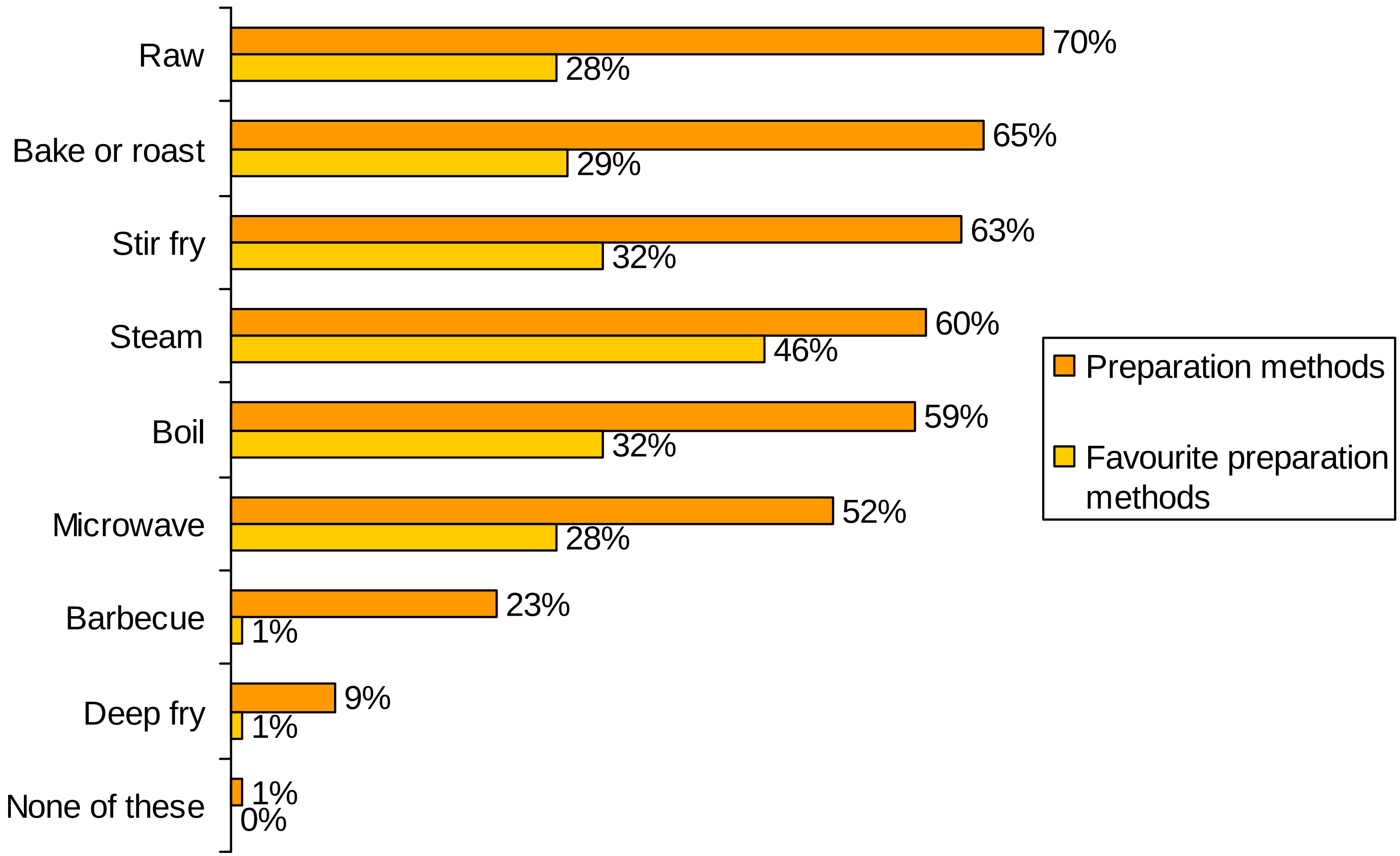


More likely to be:
- •Male 33% vs. 30%
- •35-39 yrs: 19% vs. 12%
- •Young families: 35% vs. 29%
- •Couples: 33% vs. 27%

Most have increased veg. consumption. Mainly young families (setting an example?) & couples (healthy gourmet cooking?)

Cooking/serving of fresh vegetables

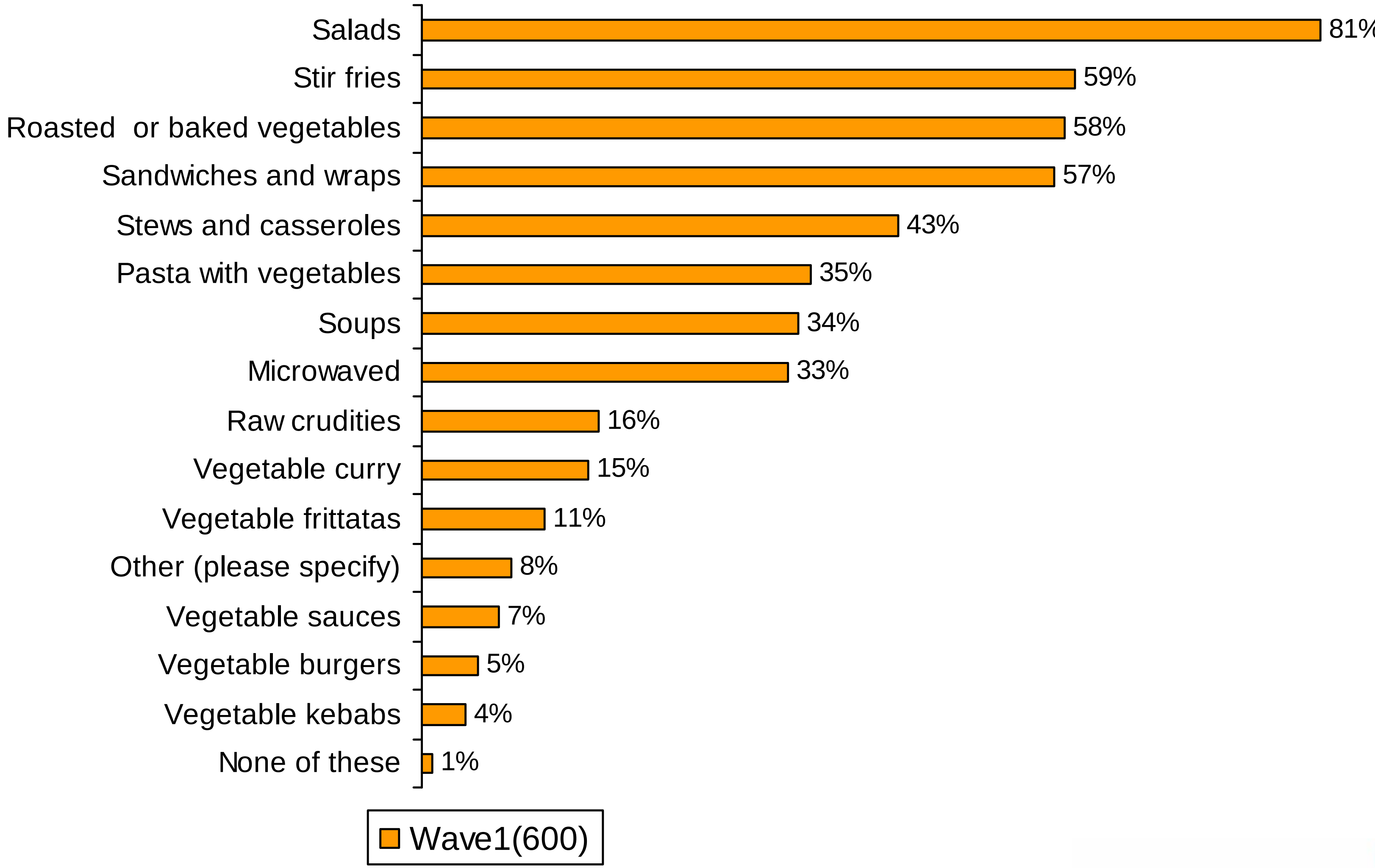
Q22: Which of the following methods have you used to cook and/or serve fresh vegetables in the PAST 2 WEEKS?
Q23: And which would you say are the main 2 ways you usually cook and/or serve fresh vegetables?
Base: All respondents (Wave 1 = 600)



Steaming is preferred, but a wide range of preparation methods have been used in the last 2 weeks

How Fresh Vegetables Are Eaten

Q24 In which of the following ways do you most often eat fresh vegetables and salads?
Base: All respondents

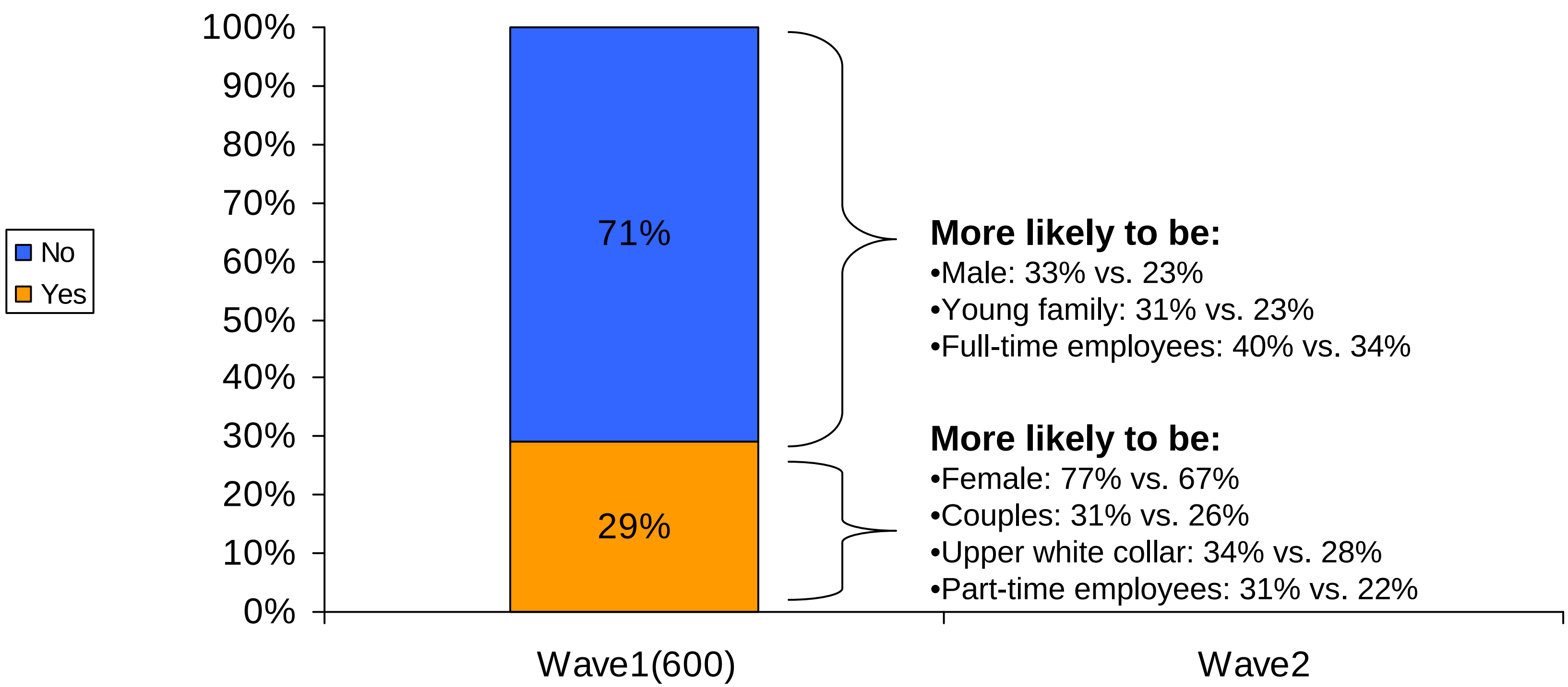


Most vegetables are eaten in the form of salads, stir-fries, baked or as sandwiches.

Vegetables And Diets

On a diet in the last 6 months?

Q26 Have you been on any form of diet in the past 6 months?
Base All respondents



More likely to be:
- •Male: 33% vs. 23%
- •Young family: 31% vs. 23%
- •Full-time employees: 40% vs. 34%

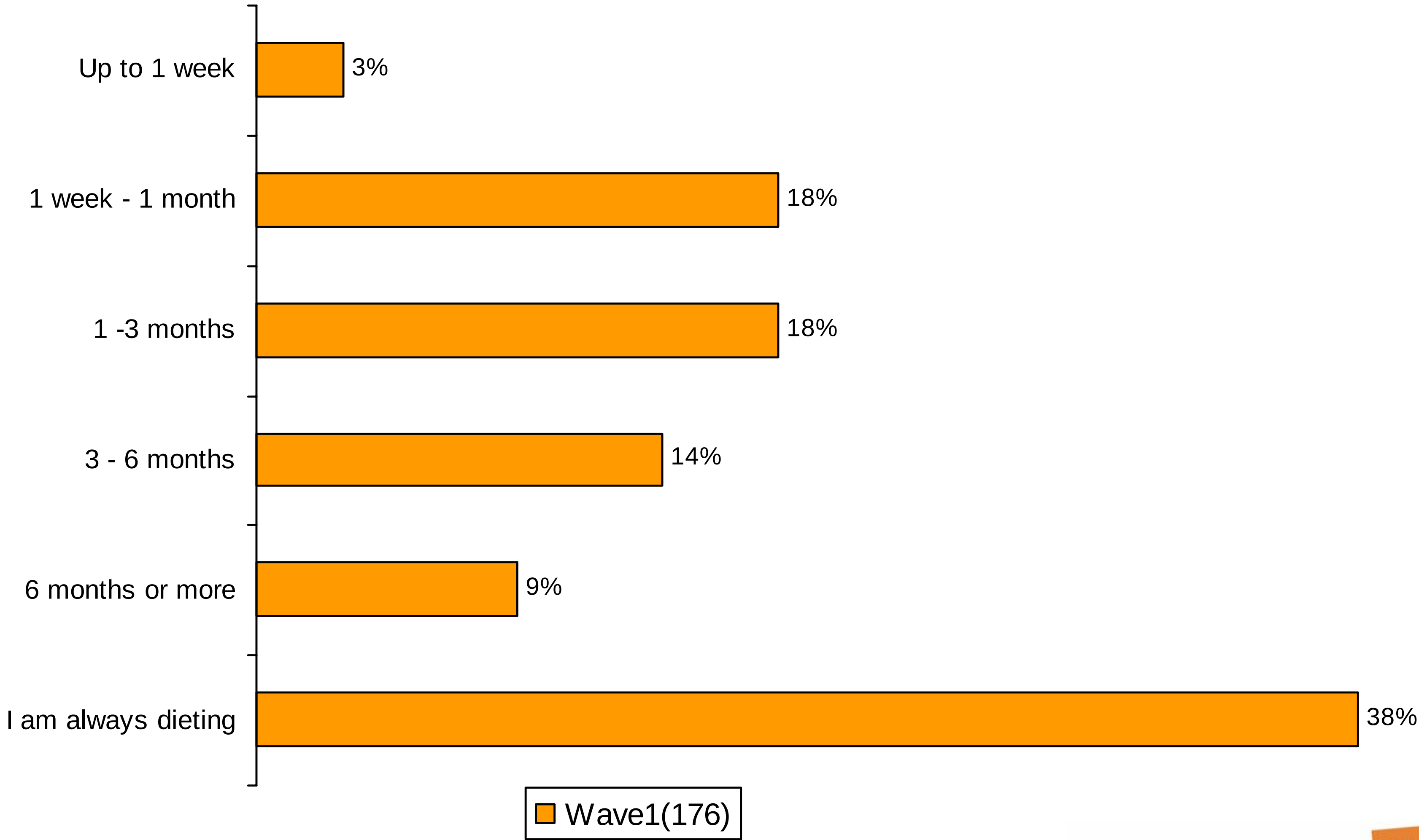
More likely to be:
- •Female: 77% vs. 67%
- •Couples: 31% vs. 26%
- •Upper white collar: 34% vs. 28%
- •Part-time employees: 31% vs. 22%

1 in 3 respondents have been on a diet in the last 6 months - more likely to be females in couples.

BRAND STORY
WHAT'S YOUR STORY?®

Length of diet

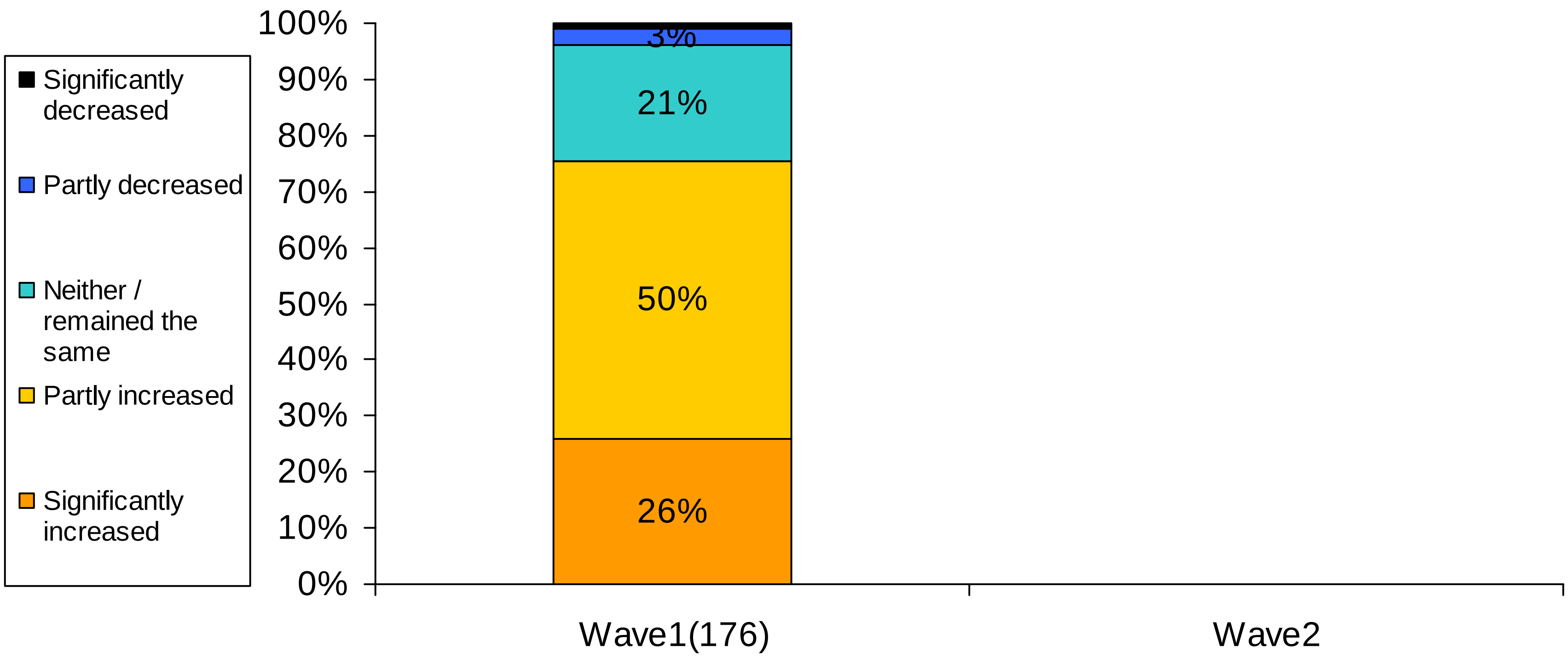
Q26 How long were you on the diet for?
Base: All respondents on a diet in last 6 months



For one-in-three a diet is not a one-off event

Veg. consumption trend for dieters

Q27: Have you as a result of your diet increased or decreased your consumption of vegetables?
Base All respondents on a diet in last 6 months



76% have increased their consumption of vegetables as a result of their diet

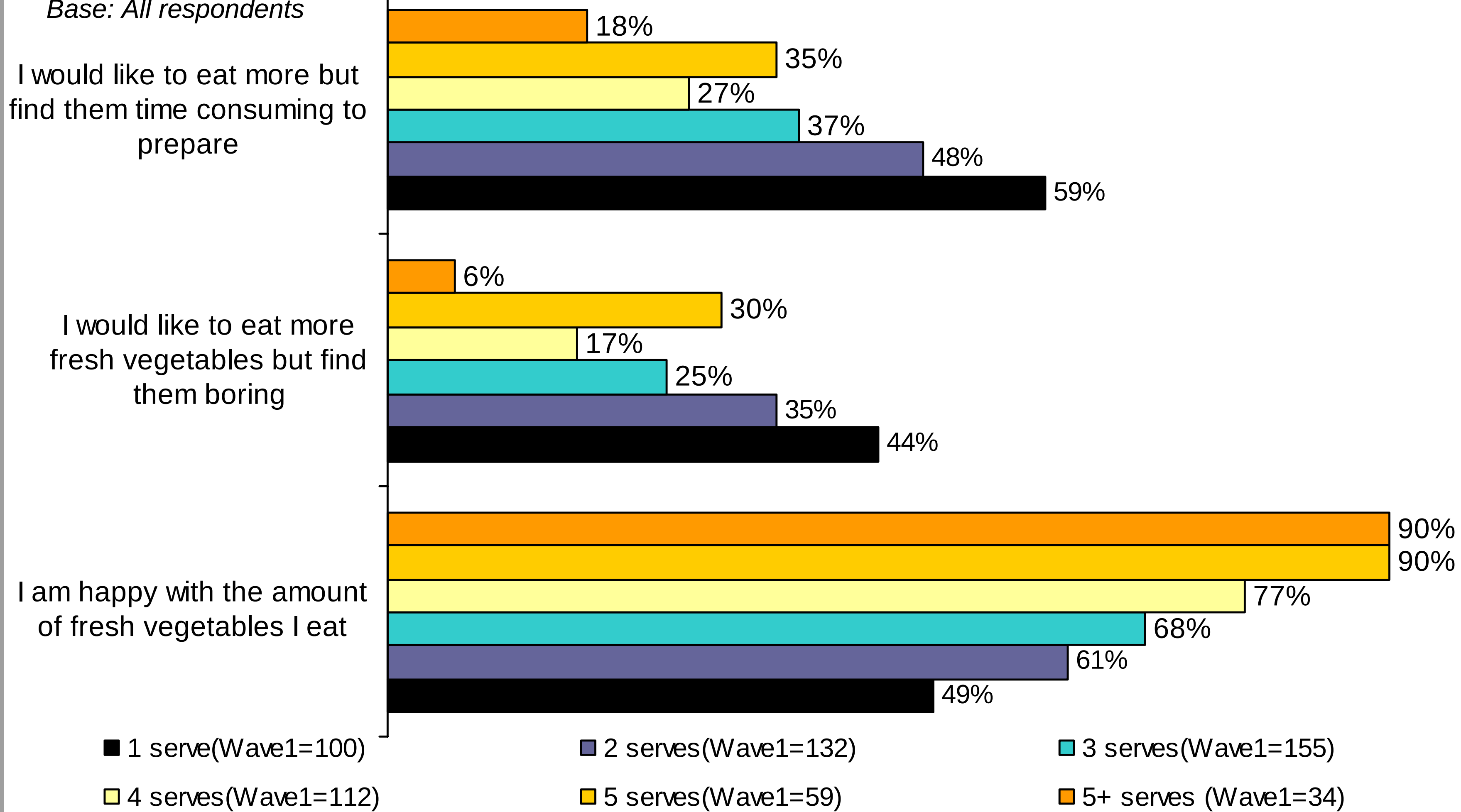
Attitudes to Vegetables

Attitudes to vegetables:

All stating they agree with the statement tested

Q19 You said in an average day, you ate [no. of serves] of fresh vegetables per day – please indicate how much you agree or disagree with each of the following statements as they apply to you

Base: All respondents



Time and disinterest are key barriers - Many 'low' consumers appear to want to eat more vegetables

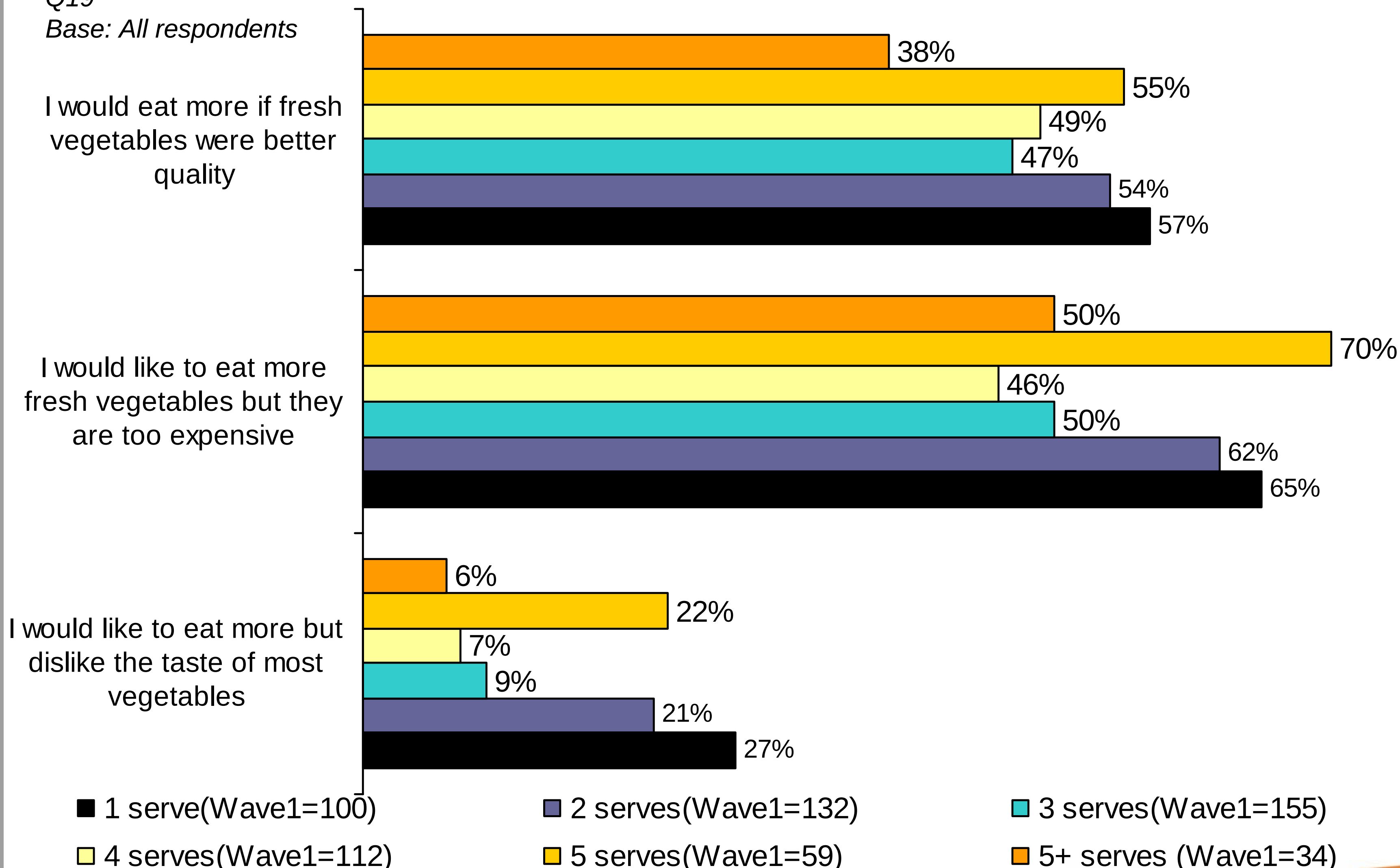
BRAND STORY

WHAT'S YOUR STORY?®

Attitudes to vegetables: (2)

All stating they agree with the statement tested

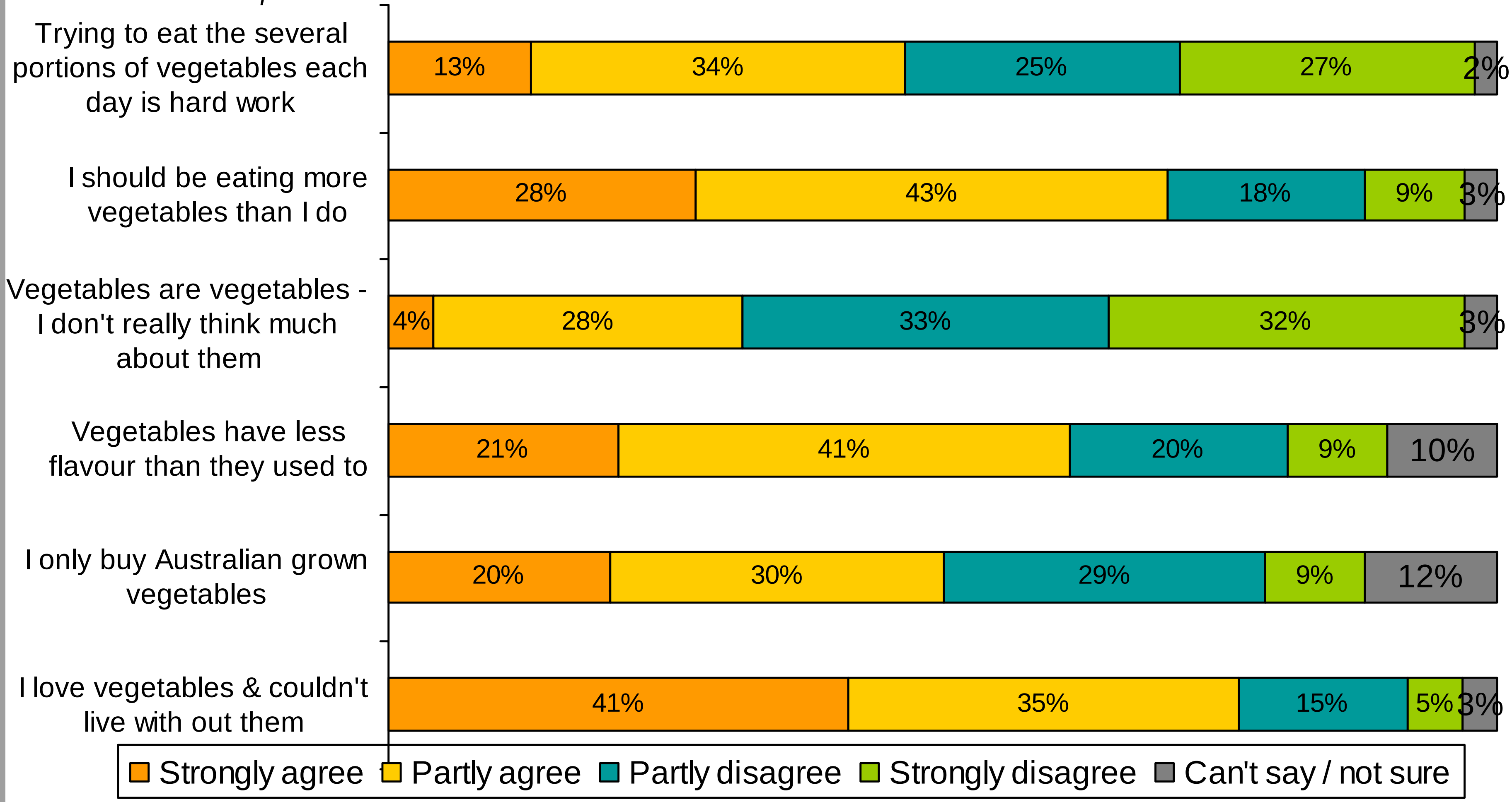
Q19
Base: All respondents



Most like vegetables, but cost & quality concerns are an issue for many.

Attitudes to vegetable consumption

Q28 Below are a number of statements about the consumption of vegetables. Please indicate how far you agree or disagree with each statement as it applies to you.
Base: All wave 1 respondents



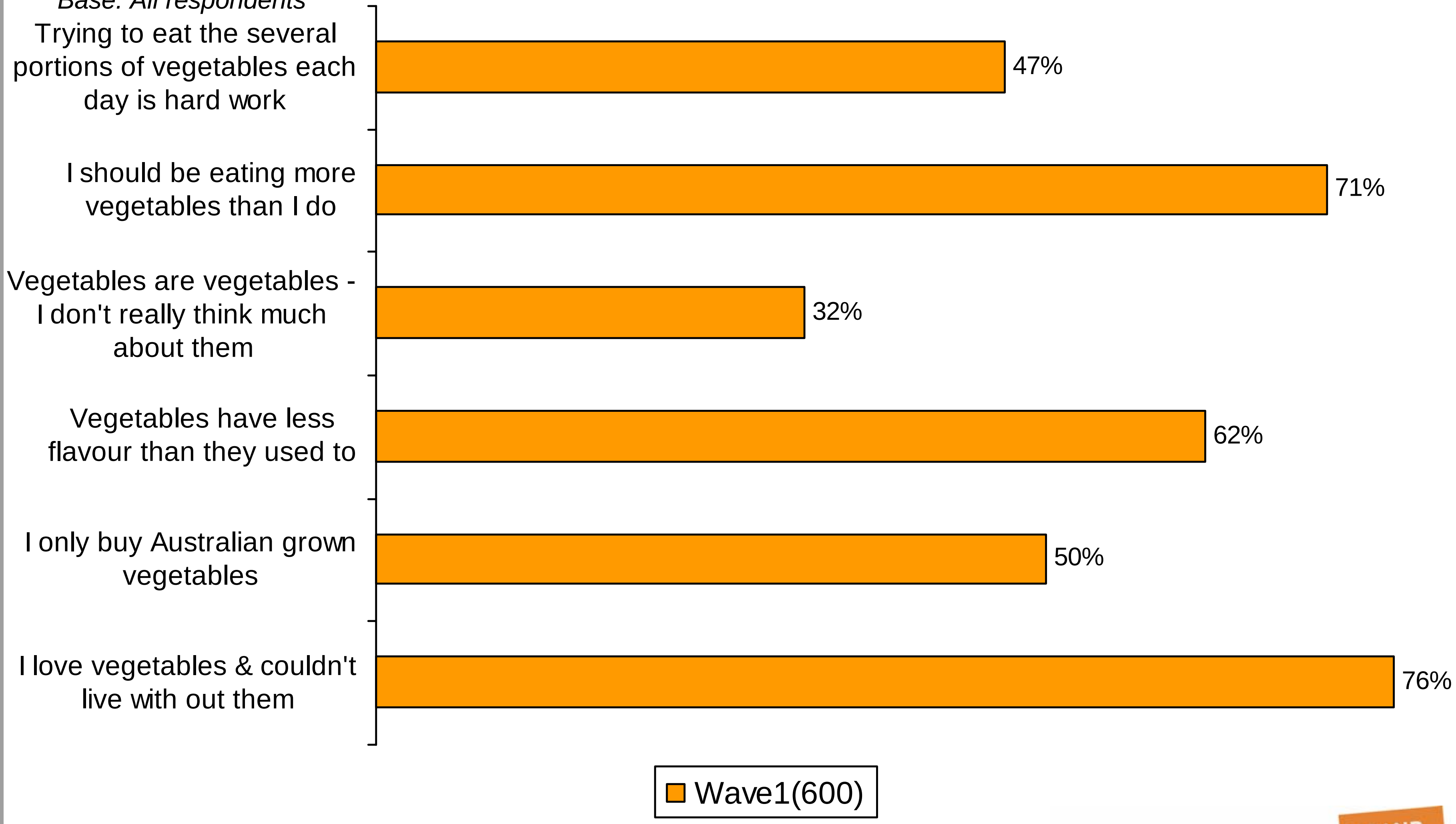
People know they should eat more and there is a fairly strong emotional connection, but getting 5 serves is tough so appreciation doesn't translate into action.

BRAND STORY
WHAT'S YOUR STORY?®

Attitudes to vegetable consumption

All stating they agree with the statement tested

Q28
Base: All respondents



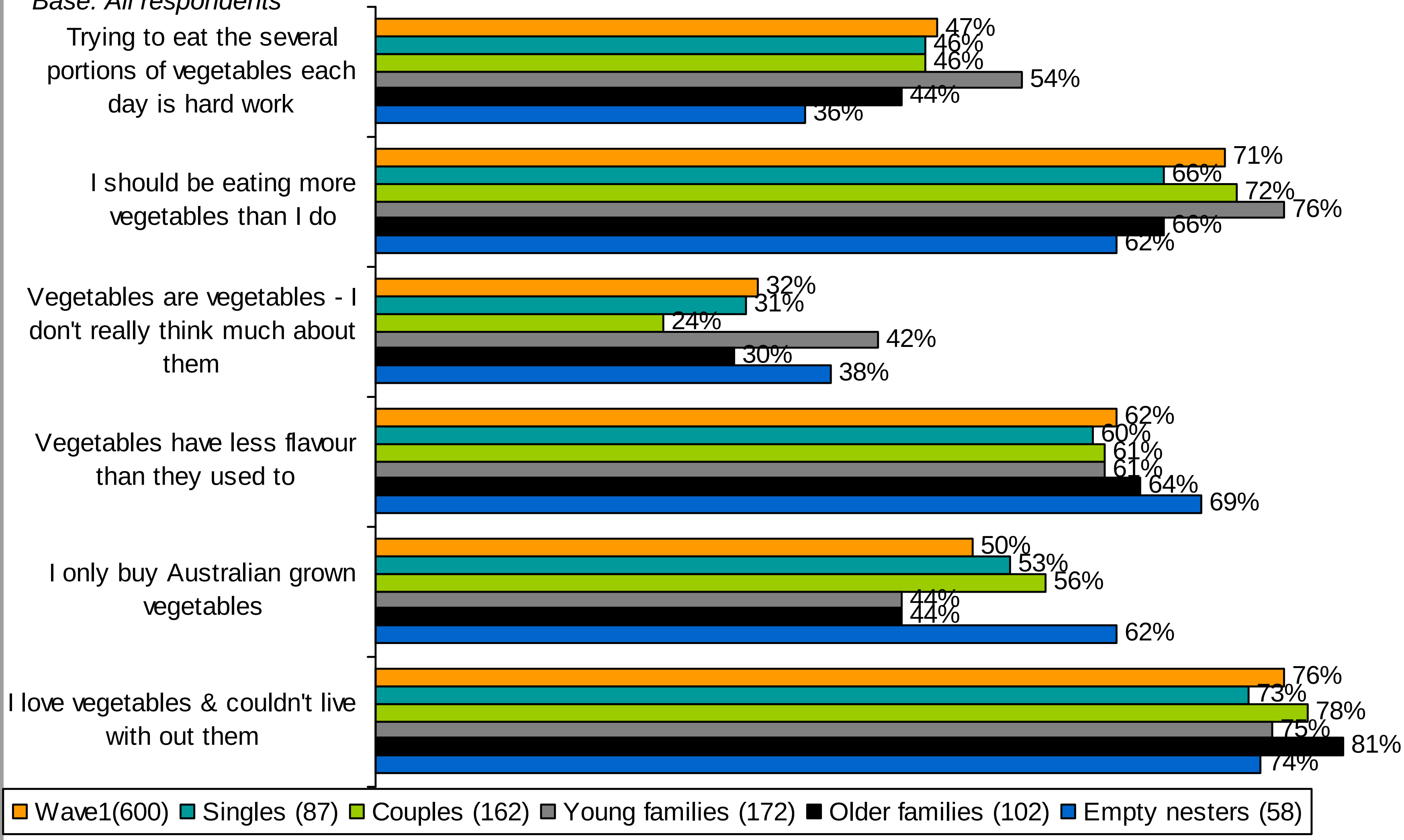
We will track attitudes over time.

Attitudes to vegetable consumption by household

All stating they agree with the statement tested

Q28

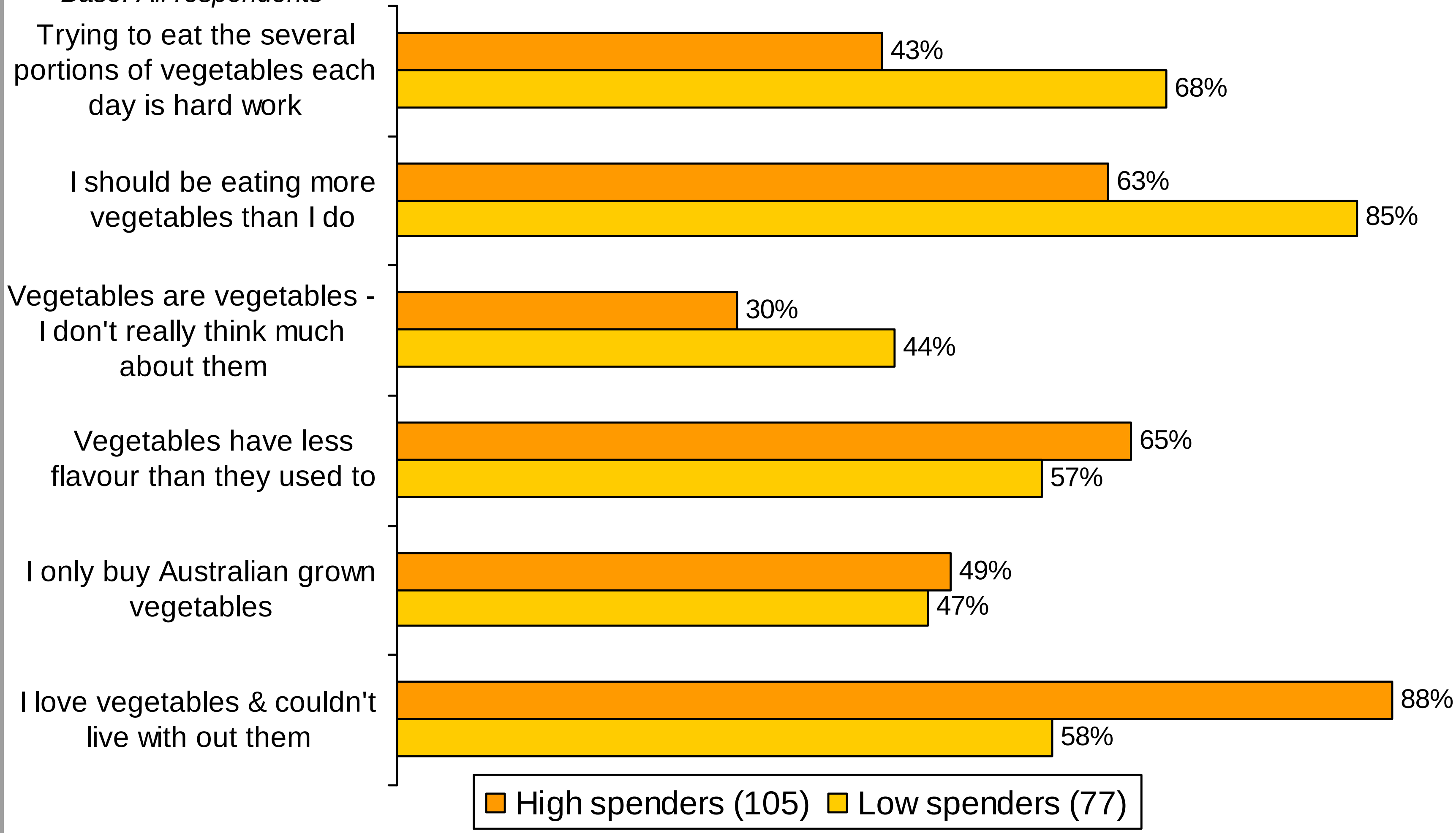
Base: All respondents



There is a universal love affair with vegetables, but families, especially young families more likely to find eating veg. hard work, be less involved with veg. & be less Australian-veg. focused

Attitudes to vegetable consumption by spend
All stating they agree with the statement tested

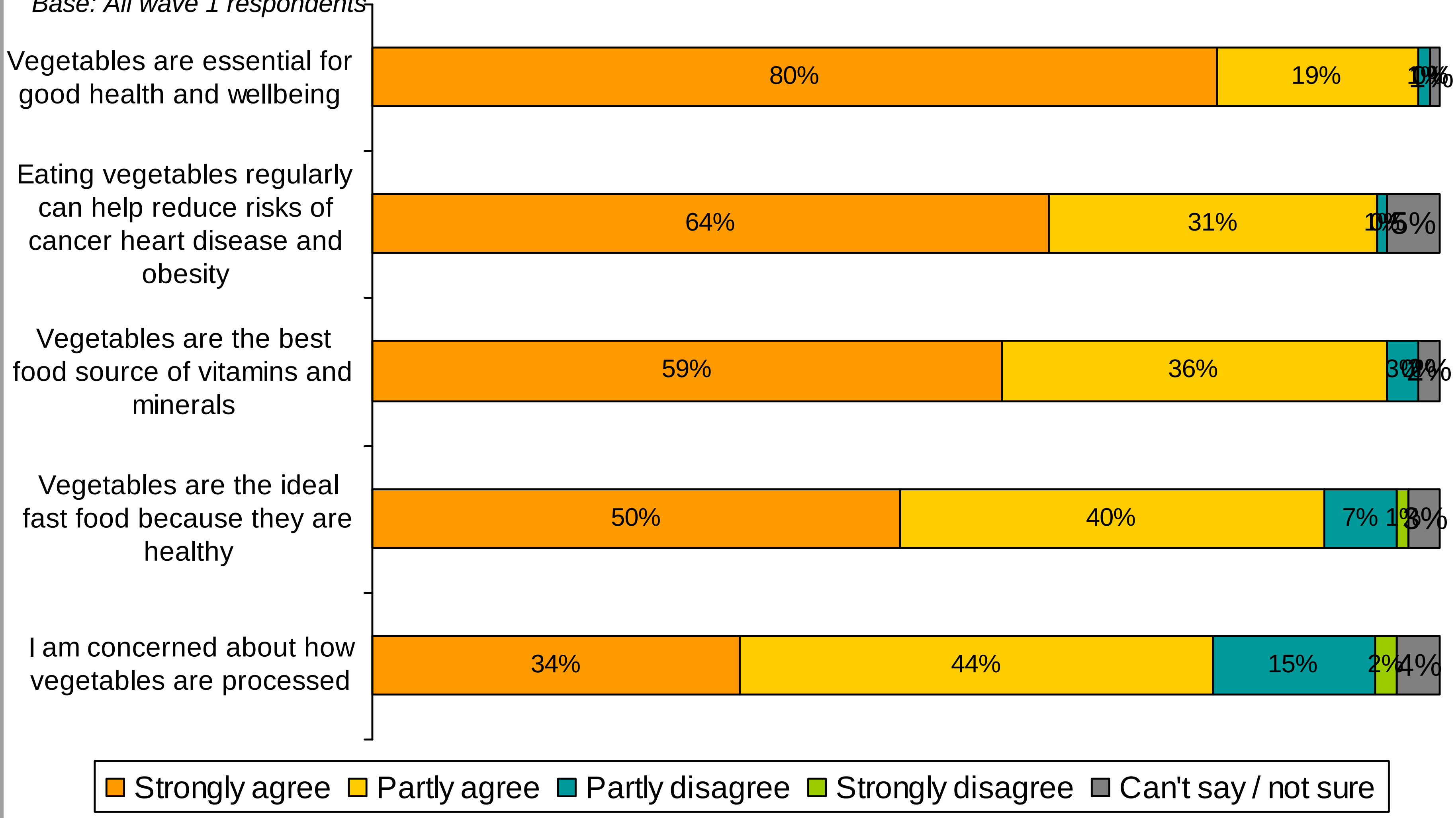
Q28
Base: All respondents



Low spenders acknowledge they should be eating more veg. High spenders are far more 'veg involved'

Attitudes to vegetable health benefits

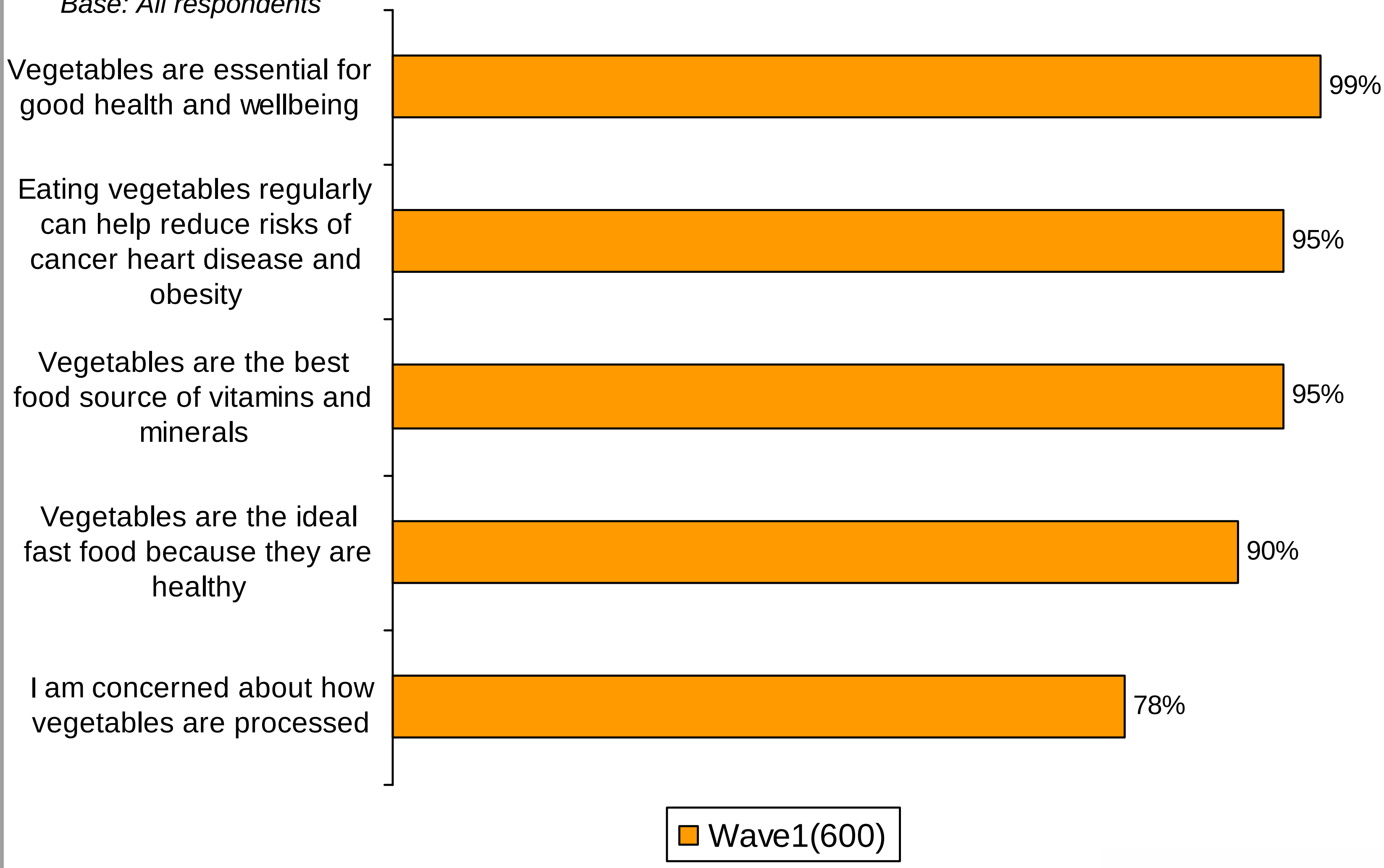
Q29: Below are a number of statements about the health attributes of vegetables. Please indicate how far you agree or disagree with each statement as it applies to you.
Base: All wave 1 respondents



Almost universal agreement with overall health, because that is how veg as been position, but there is room for improvement in specific territories such as disease reduction, nutritional benefits

Attitudes to vegetable health benefits:
All stating agreement with the statement tested

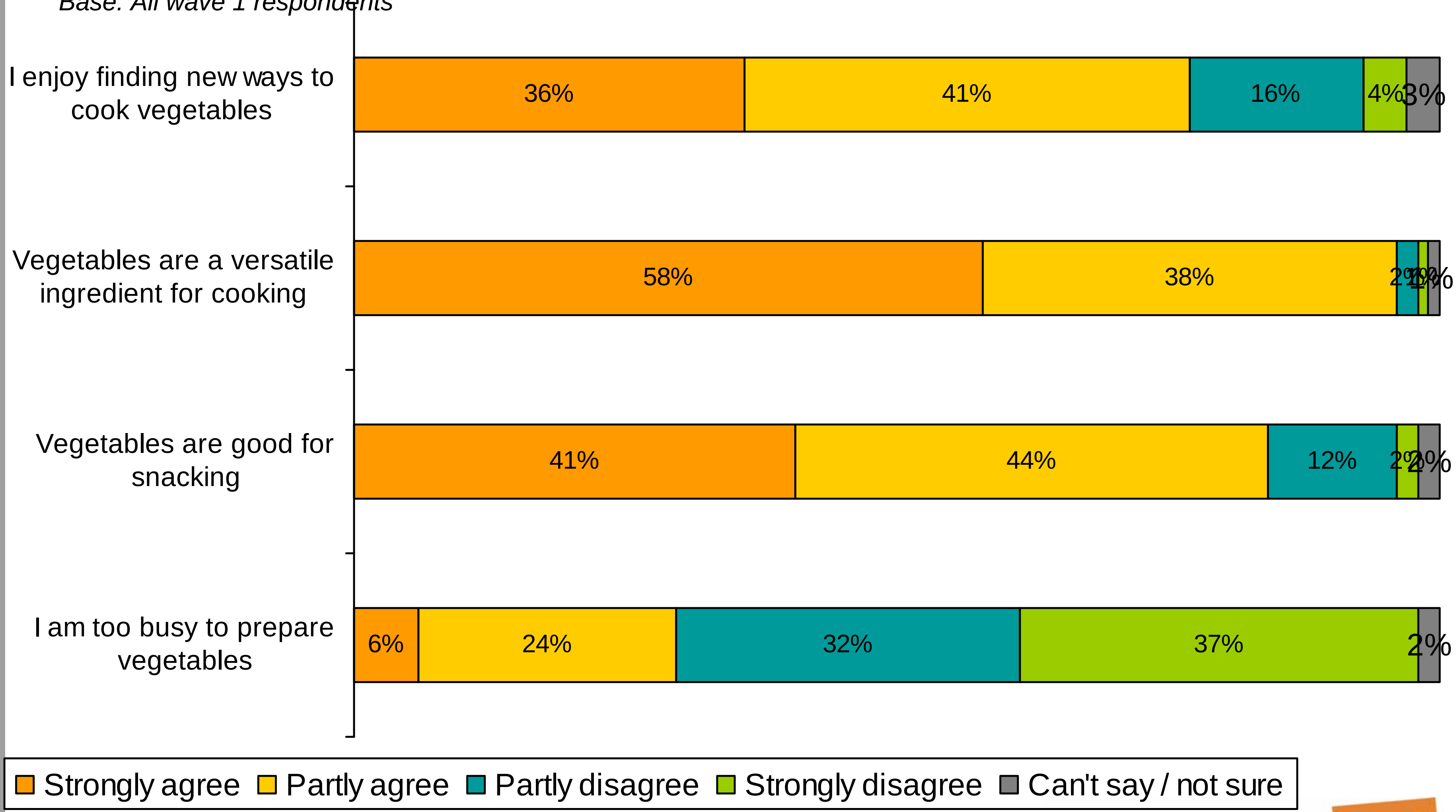
Q29
Base: All respondents



We will track attitudes over time.

Attitudes to vegetable usage

Q30. Below are a number of statements about the usage of vegetables. Please indicate how far you agree or disagree with each statement as it applies to you.
Base: All wave 1 respondents

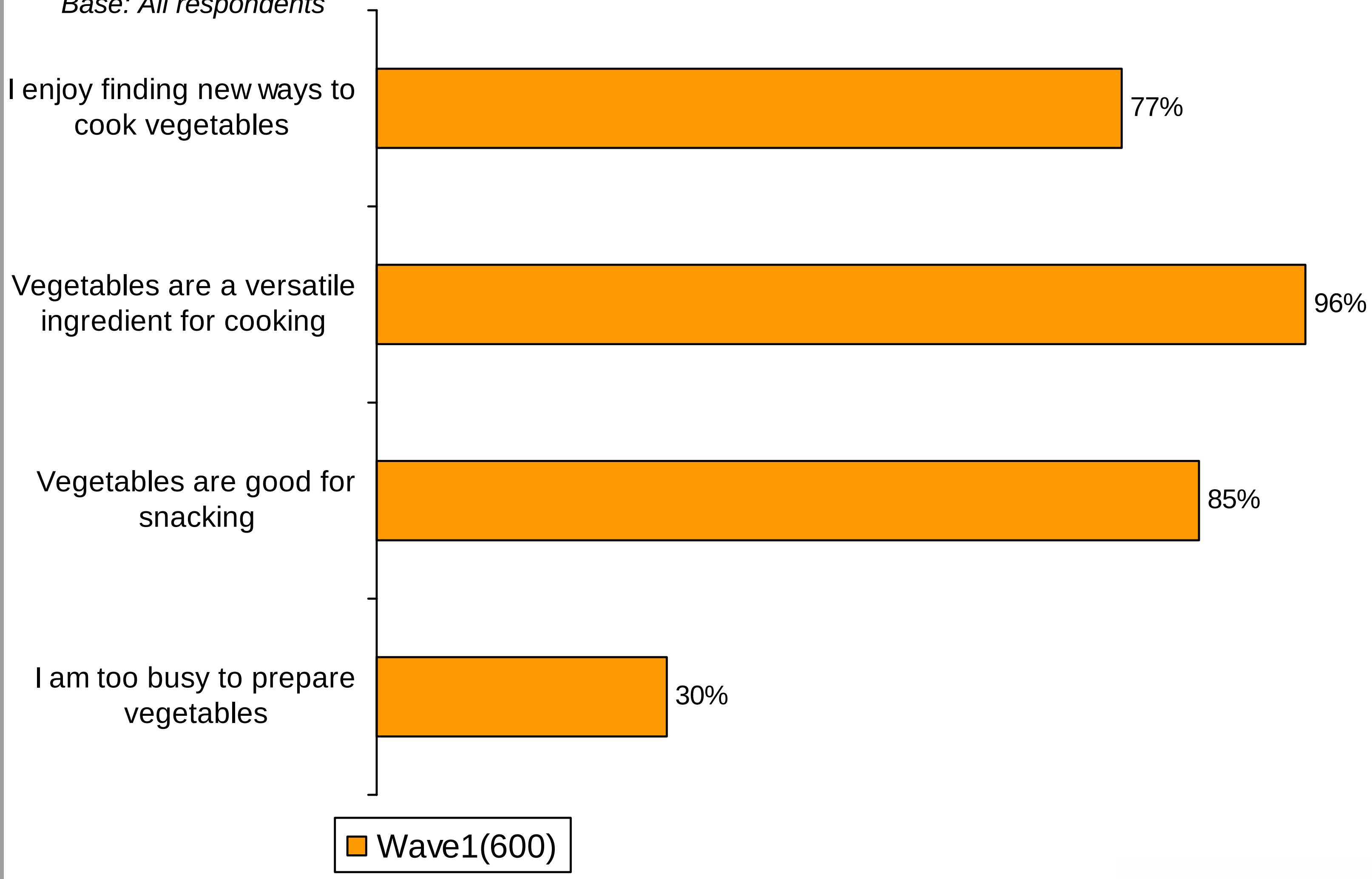


Time is not an issue for many.

WHAT'S YOUR STORY?®

Vegetable usage attitudes:
All stating agreement with the statement tested

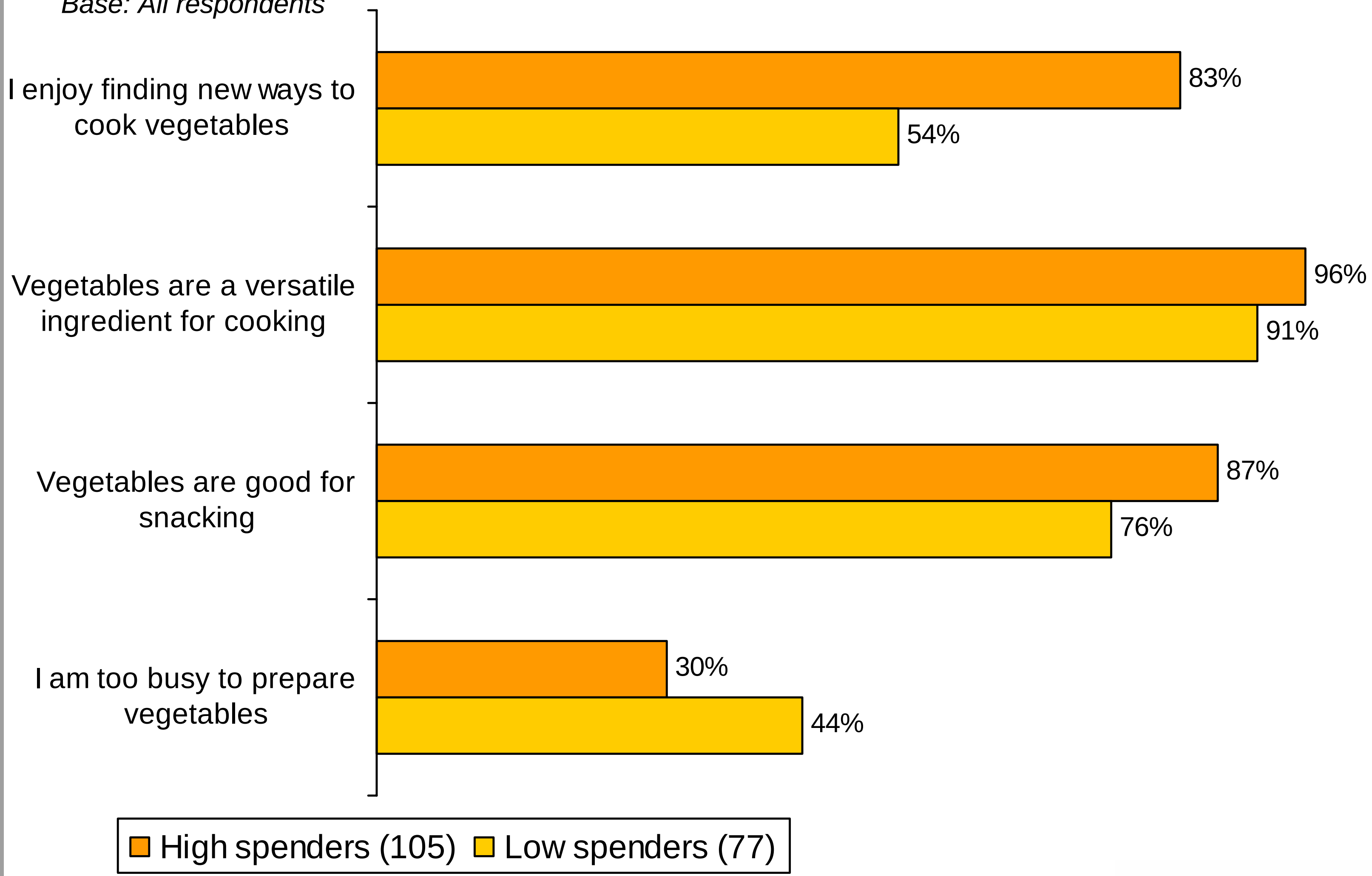
Q30
Base: All respondents



We will track attitudes over time.

Vegetable usage attitudes by spend
All stating agreement with the statement tested

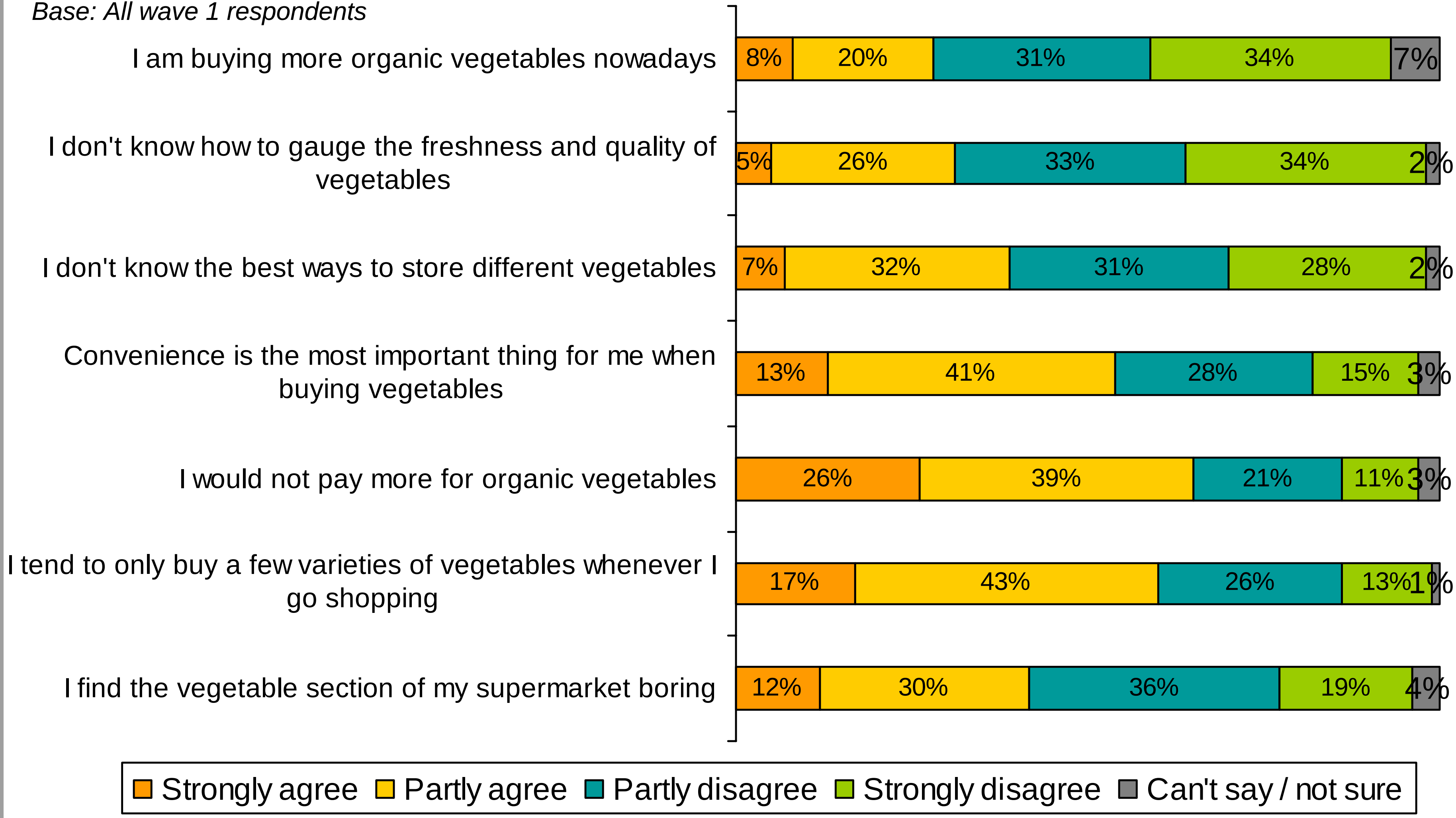
Q30
Base: All respondents



Lack of time and engagement with cooking appear to be drivers of low spend

Attitudes to vegetables

Q31: Below are a number of statements about the shopping, selection and storage of vegetables. Please indicate how far you agree or disagree with each statement as it applies to you
Base: All wave 1 respondents



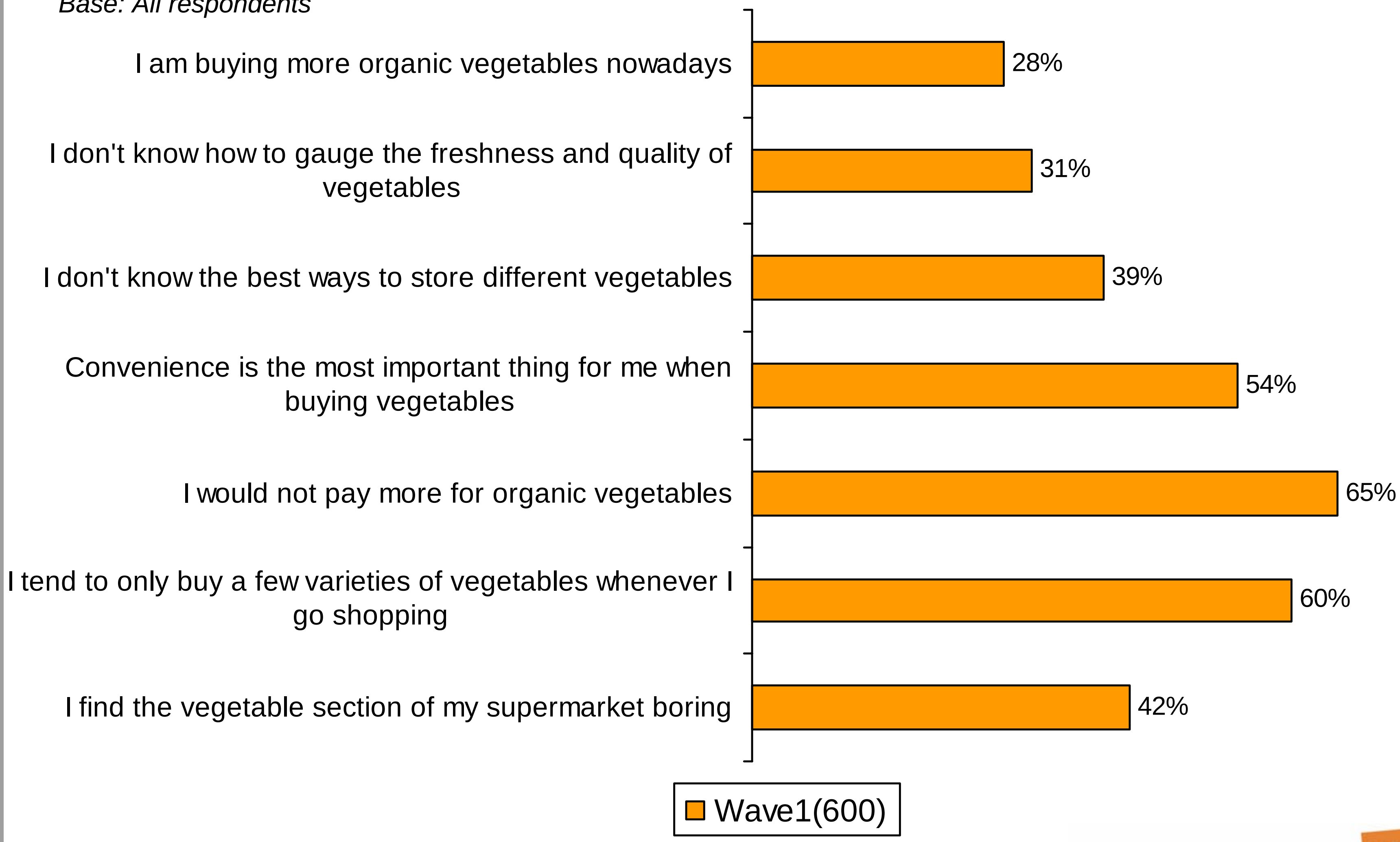
Convenience at POS is key. Organic at a price premium has low appeal.

WHAT'S YOUR STORY?®

Vegetable attitudes

All stating agreement with the statement tested

Q31
Base: All respondents

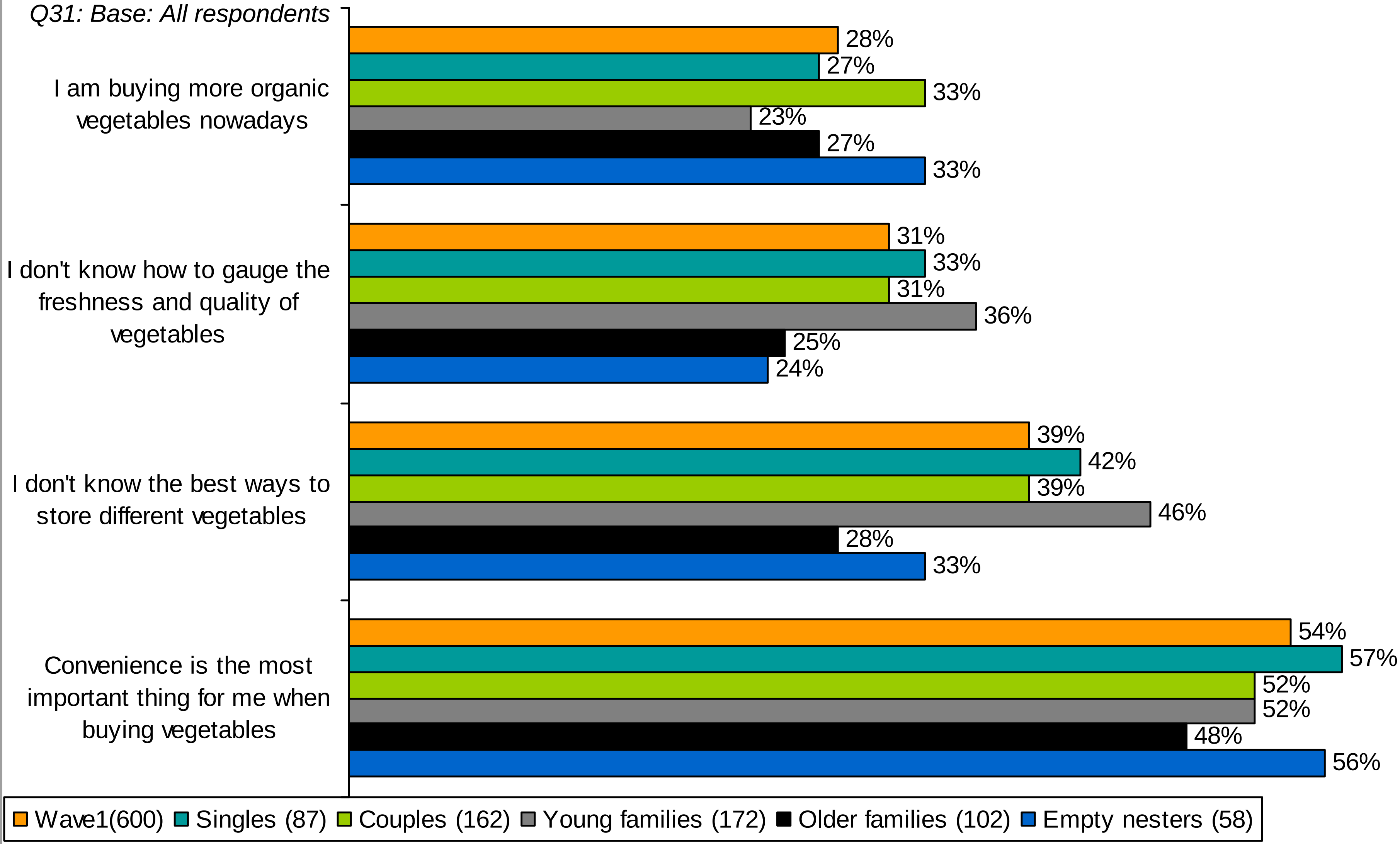


We will track attitudes over time.

WHAT'S YOUR STORY?®

Attitudes to vegetables by household (1)

All stating they agree with the statement tested



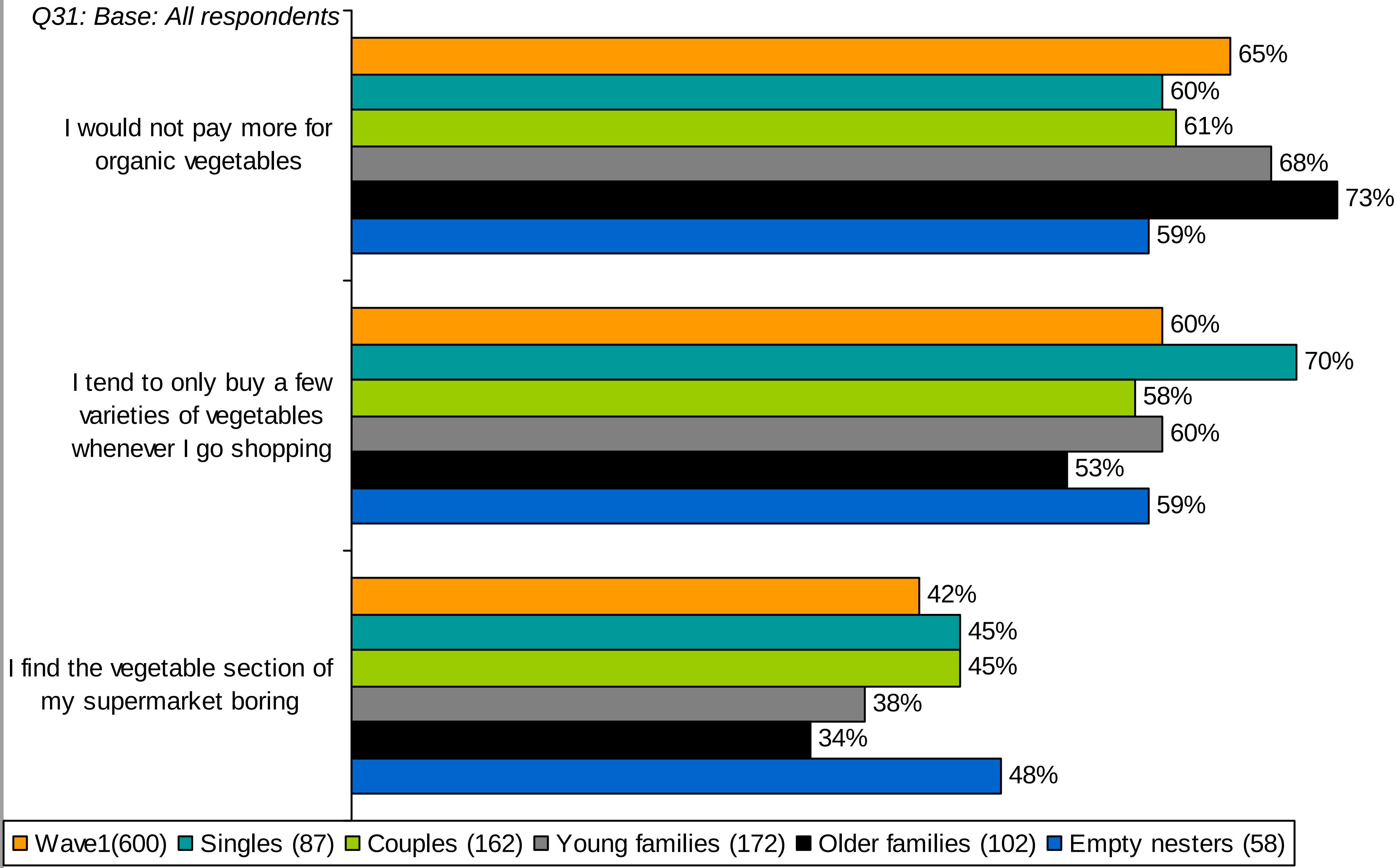
Purchase convenience is key. Couples & empty nesters are buying organic veg. Apparent knowledge gaps in young families.

BRAND STORY

WHAT'S YOUR STORY?®

Attitudes to vegetables by household (2)

All stating they agree with the statement tested

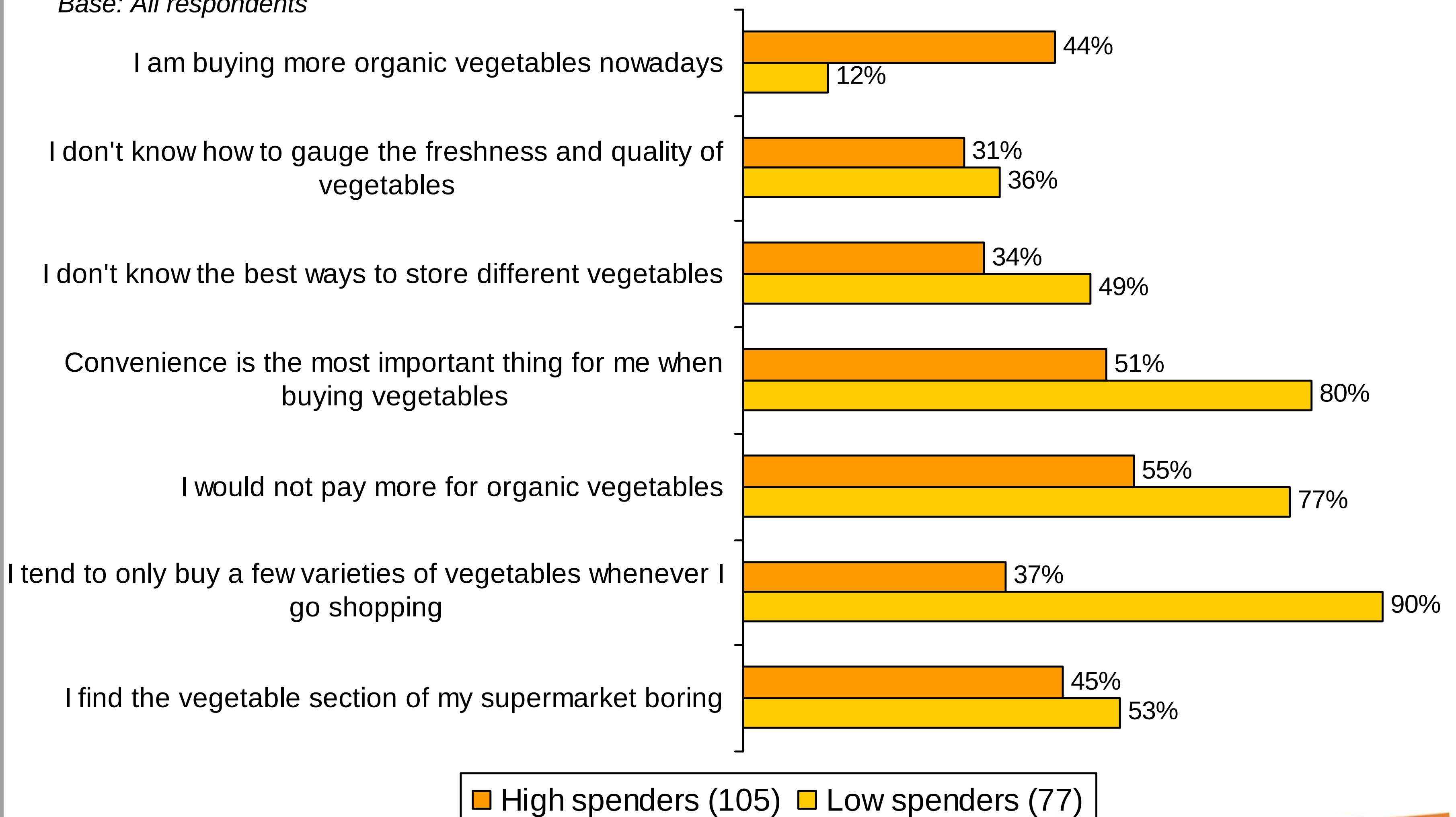


Families less likely to pay an organic premium. Single households limit the veg they buy. Singles, couples & empty nesters more likely to find veg. section of the supermarket boring

Vegetable attitudes by spend

All stating agreement with the statement tested

Q31
Base: All respondents

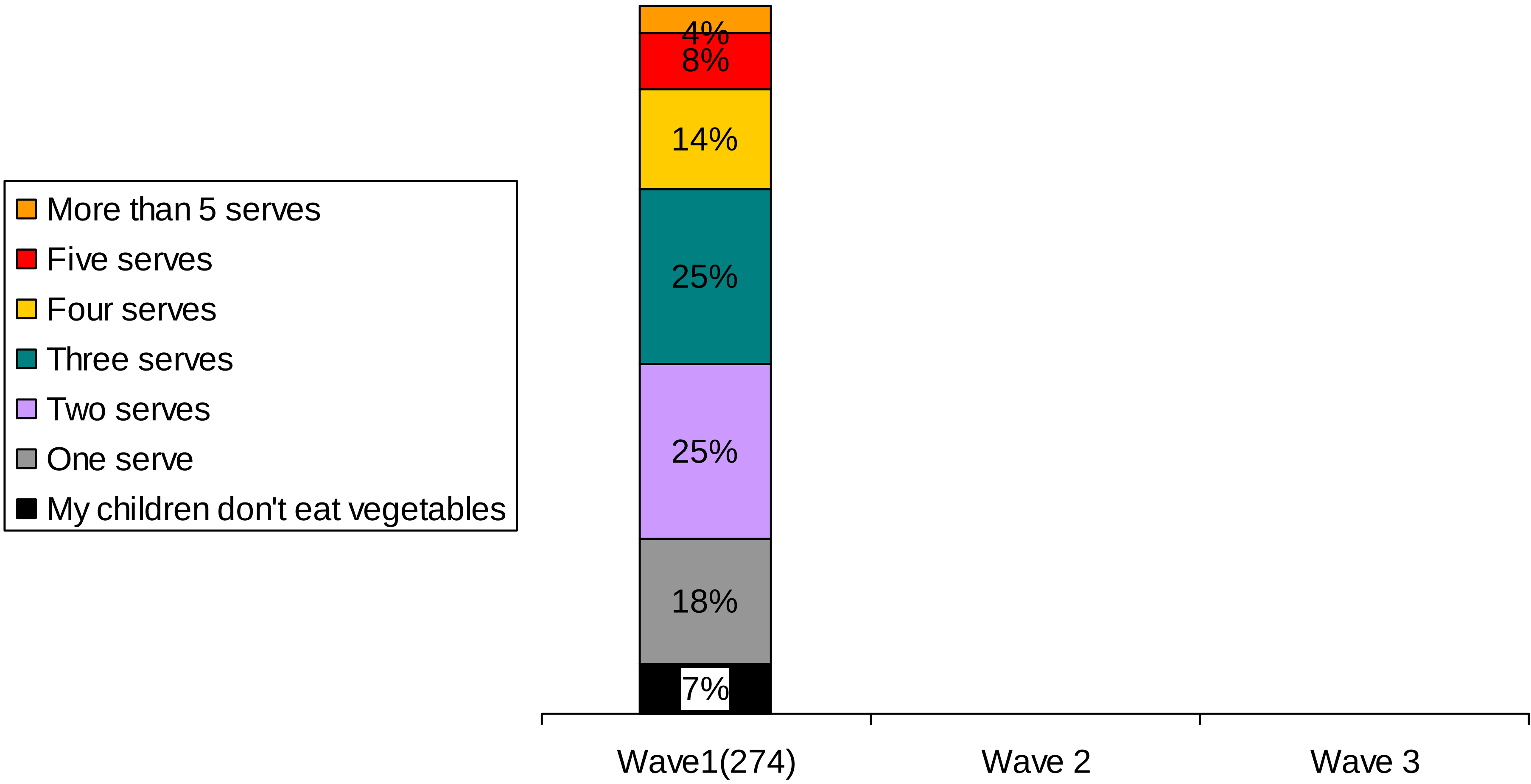


Organic – clearly the realm of high spenders. Low spenders driven by convenience and budget.

Kids and Vegetables

Serves of vegetables children eat

Q20: Thinking about your children consider an average day - approximately how many serves of fresh vegetables would your children eat per day? (e.g. one carrot or one tomato or one cup of lettuce = one serve)
Base: All respondents with children

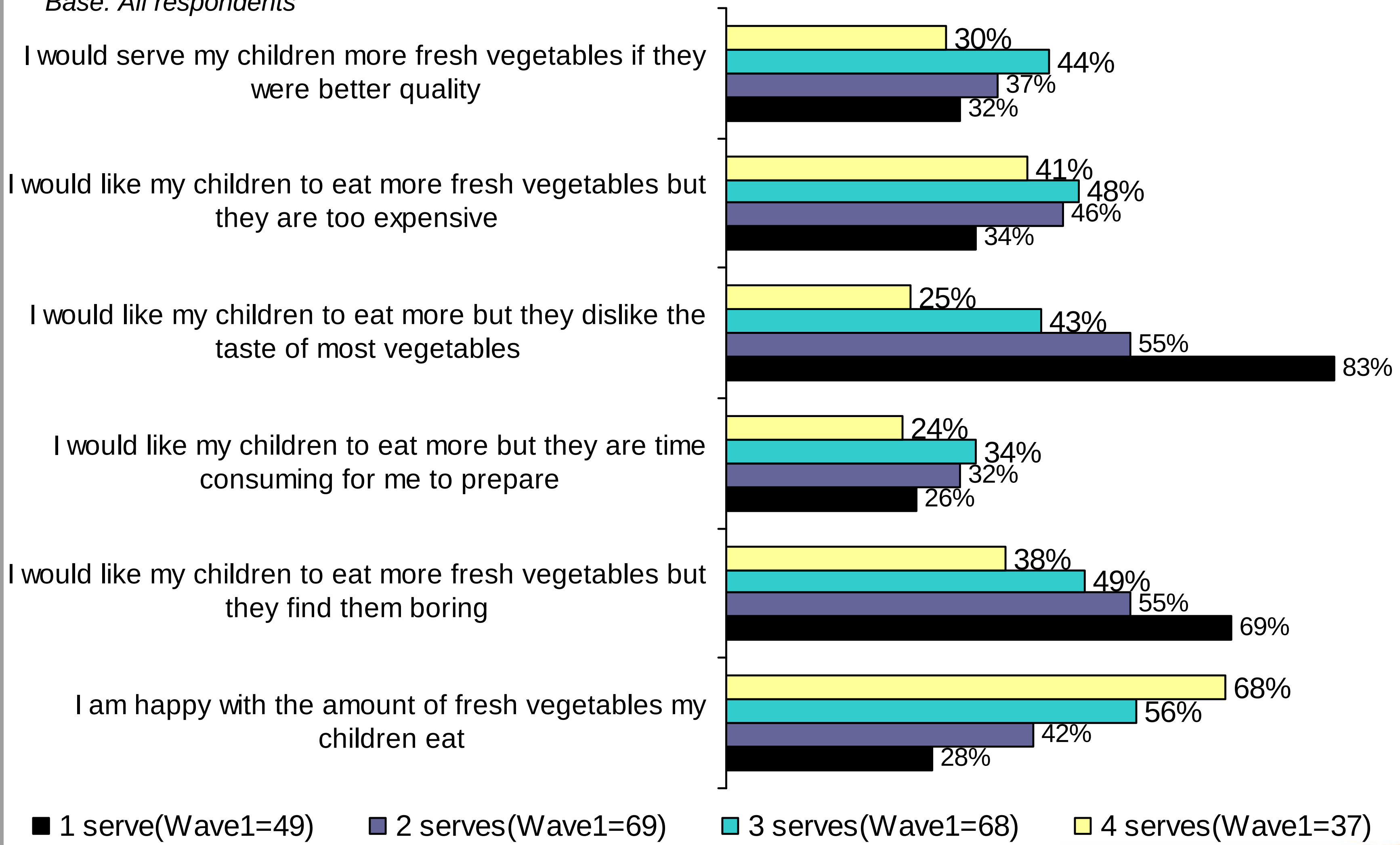


2 – 3 serves is the norm, which falls far short of 5 a day.

Attitudes to vegetables by # serves

All stating agreement with the statement tested

Q21
Base: All respondents

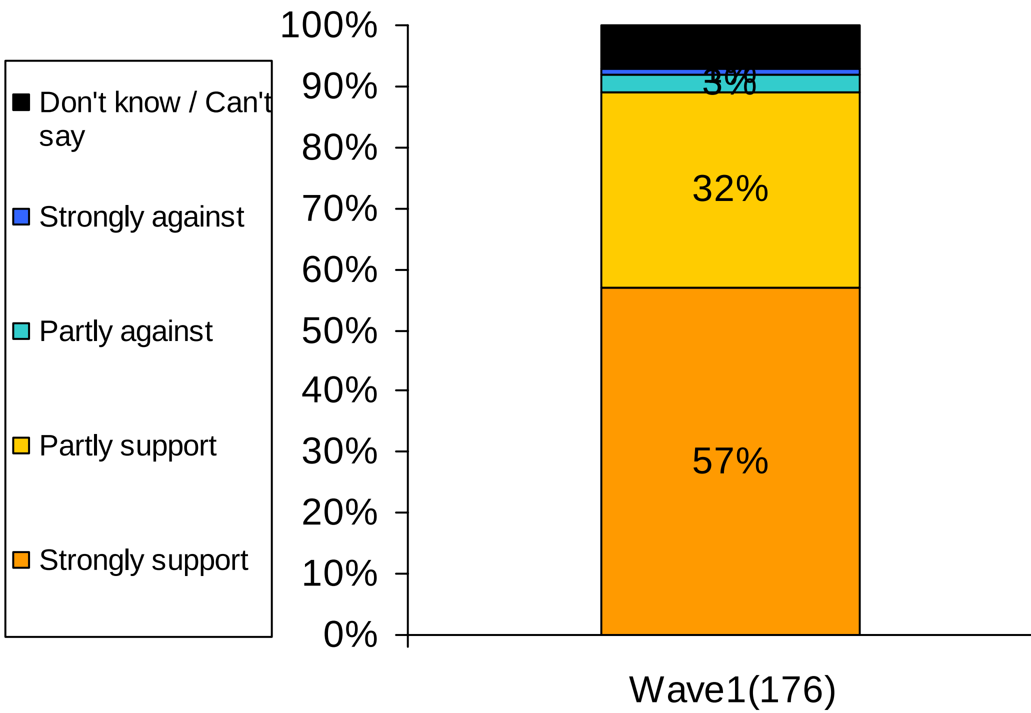


Dislike of & disinterest in vegetables are the main barriers for children

WHAT'S YOUR STORY?®

There is support for TV character promotion

Q32: If the vegetable industry were to use TV cartoon characters and merchandising to encourage the consumption of fresh vegetables amongst your children, please indicate your level of support for this idea.
Base: All respondents with children



Support for this initiative is high.

Top 5 ideas for increasing consumption of vegetables by children (prompted)

Q33: Below is a range of ideas on how to encourage children to eat more vegetables on a regular basis. Please indicate to what extent you agree or disagree with the effectiveness of each of the messages or tactics below to increase consumption of vegetables amongst kids.
Base: All wave 1 respondents with children (274)

Ideas shown with total level of agreement:

1. Make vegetables available so they can snack on them when they like (95%)
2. Serve vegetables as part of their favourite foods e.g. Tacos, Pizza, Pasta & Chinese (94%)
3. Serve vegetables in a variety of interesting ways e.g. cut into interesting shapes (92%)
4. Tell children that eating vegetables regularly keeps them looking good and healthy (86%)
5. Serve vegetables in or with dips with biscuits or corn chips (84%)

Increasing accessibility of vegetables & integrating them into the food the kids <u>do</u> eat are recommended, followed by increasing interest through new ways of serving

Additional ideas for increasing consumption of vegetables by children (prompted)

Q33: Below is a range of ideas on how to encourage children to eat more vegetables on a regular basis. Please indicate to what extent you agree or disagree with the effectiveness of each of the messages or tactics below to increase consumption of vegetables amongst kids.
Base: All wave 1 respondents with children (274)

Two further ideas had a high level of strong agreement, but, the % of those disagreeing kept them out of the top 5:

- Tell children that vegetables are power packed with vitamins and nutrients (42% stated *strong* agreement)
- Tell children eating fresh vegetables everyday can help them concentrate longer (44% stated *strong* agreement)

Selling children a health solution via vegetables is polarizing, but could be considered

In sum

Key take-outs

- Almost all consumers have purchased vegetables in last 2 weeks
- Fresh vegetable purchasing is increasing and almost 60% state they have increased their consumption over the past 12 months

- Two groups of ‘staple vegetables’ emerge (that all households buy):
  - Primary (over 70% buy): Tomatoes, Potatoes, Carrots, Onion, Lettuce
  - Secondary (50-70% buy): Mushrooms, Broccoli, Capsicum, Pumpkin

- Different household structures have different relationships

  - **Mums:** High spend a function of the number of heads to feed, seeking supermarket convenience, need advice on storing vegetables and plan their shopping in advance
  - **Couples:** High spend a function of involvement with vegetables, like cooking and select their vegetables at point of sale, working around what is in season
  - **Singles:** Starting to catch up on consumption, but are limited by time and lack of interest in cooking. Big buyers of pre-prepared vegetables

Key take-outs cont.

- **Kids:** Boredom and dislike are the main barriers for vegetable consumption

- Key ways in which to overcome these barriers:
  - Raise interest of vegetables via new ways of serving
  - Integrate with day to day life (around the home/ adding to foods currently eaten)
  - Communication by TV cartoon characters is supported, but is this because this is what other products are doing?

- There is some emotional connection to vegetables (far less than fruit), an appreciation of their general health credentials and a need to eat five serves a day, but majority only eat 2-3 serves per day

Consumers (adults and kids) need assistance, education and stimulation to further increase the consumption and perceived value of vegetables