



Horticulture Australia and AUSVEG.

Presentation and Packaging
of Vegetables.

Exploring Consumers' Perceptions
and Needs.

Prepared for The Australian Vegetable Industry
Prepared by Colmar Brunton

Colmar Brunton Contacts | Stuart Todd (Account Director) & Megan Ferguson (Qualitative Specialist)

Email: stuart.todd@colmarbrunton.com | Phone: 03 8640 5200

14th March 2014

Document version: 000920 HARVEST qualitative research_report_10_14-03-2014



Contents.

| | |
|--|----------------|
| Introduction | Page 3 |
| Research findings | Page 7 |
| Key Learnings about the category | Page 9 |
| • Key influences | Page 12 |
| • Life stage | Page 14 |
| • Budget & affordability | Page 19 |
| • Country of origin | Page 22 |
| • Knowledge about storage | Page 24 |
| • Packing & presentation | Page 28 |
| • Information & health claims | Page 32 |
| Key Learnings about consumers | Page 34 |
| • Consumer attitudinal segmentation | Page 35 |
| • Communicating with consumers | Page 51 |
| Conclusions & recommendations | Page 55 |
| Appendix | Page 61 |
| • Consumer feedback on product & packaging innovations | Page 63 |



Introduction.



Background

The Australian Vegetable Industry identified a need to understand current customer attitudes within the fresh vegetable category. Of interest are current attitudes, perceptions and buying behaviours of loose, packaged and pre-prepared vegetables.

Qualitative research was conducted among Australian vegetable consumers residing in metropolitan and regional areas of New South Wales, Queensland, Western Australian, Victoria and South Australia. Participants in the research represented a range of age groups, life stages and vegetable buying behaviours.

The research aimed to identify what is required, in terms of presentation and packaging of vegetables, to drive increased sales of fresh vegetables among the Australian public.

This report has been prepared for the Australian vegetable industry.





Research Vision

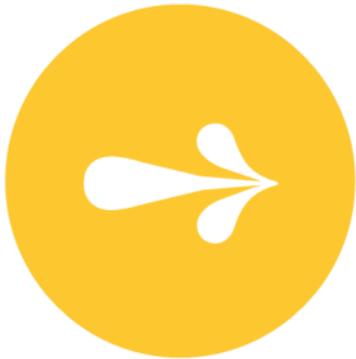
- To inform the vegetable industry about the needs of Australian vegetable consumers;
- To provide the vegetable industry with actionable insight to grow their business and increase sales of vegetables among the Australian public; and
- To provide information to the vegetable industry to support wholesaler and retailer negotiations.





Who we spoke with

Qualitative fieldwork conducted from Thursday 21st November – Tuesday 3rd December 2013.



| Focus groups | Location | Methodology | Group Specifications | n= |
|------------------------------|------------------|--------------|---|----|
| Group 1 | Melbourne | Face to face | 25-40 years, all with dependent children, mix male and female, all main grocery buyers | 5 |
| Group 2 | Melbourne | Face to face | 40+ years, mix with/without dependent children, mix male and female, all main grocery buyers | 8 |
| Group 3 | Adelaide | Face to face | 25-40 years, mix with/ without dependent children, mix male and female, all main grocery buyers | 7 |
| Group 4 | Adelaide | Face to face | 40+ years, mix with/without dependent children, mix male and female, all main grocery buyers | 7 |
| Group 5 | Regional NSW/QLD | Online | Mix younger and older age groups, mix with/without dependent children, mix male and female, all main grocery buyers | 9 |
| Group 6 | Regional WA | Online | Mix younger and older age groups, mix with/without dependent children, mix male and female, all main grocery buyers | 7 |
| Group 7 | Sydney | Face to face | 25-40 years, mix with/ without dependent children, mix male and female, all main grocery buyers | 6 |
| Group 8 | Sydney | Face to face | 40+ years, mix with/without dependent children, mix male and female, all main grocery buyers | 6 |
| Group 9 | Brisbane | Face to face | 30+ years, mix with/without dependent children, mix male and female, all main grocery buyers | 7 |
| Group 10 | Brisbane | Face to face | 18-24 years, no dependent children, mix male and female, all main grocery buyers | 7 |
| Group 11 | Perth | Online | Mix younger and older age groups, mix with/without dependent children, mix male and female, all main grocery buyers | 9 |
| Group 12 | Regional SA/VIC | Online | Mix younger and older age groups, mix with/without dependent children, mix male and female, all main grocery buyers | 8 |
| Total number of participants | | | | 86 |



Research Findings.

A yellow decorative graphic consisting of three teardrop-like shapes radiating from a central point, positioned to the right of the text circle.

Consumers **feel good** about themselves when they are buying vegetables.

They would like to **buy more**; both in quantity and variety.

Presentation, innovation, information and **communication** are all key to **encouraging** greater purchase.

A photograph of several baskets filled with fresh, green Brussels sprouts. The sprouts are round and have a slightly wrinkled texture. They are arranged in a grid-like pattern across the image. A large, dark gray circle is overlaid in the center, containing the text.

Key learnings
about the
category.

Why are there vegetables that consumers ignore..... Whilst others are bought every week without fail?

Never

- ✗ Taste not appealing.
- ✗ Tried it once and didn't like it.
- ✗ Don't know how to store or keep fresh.
- ✗ Disliked as a child.
- ✗ Not sure what to do with them.
- ✗ Don't know when they are ripe or not - what to look & feel for.
- ✗ Cost - too expensive to risk.
- ✗ Quality is poor.
- ✗ Too much labour and time to prepare.

I love spinach, but I am the only one out of the five of us that does. It's just a waste to buy it for my family. (Sydney 25-40 years)

I know I could buy it, then go home and 'google' it ...but I am just not going to do that. It needs to go the other way. I need to know what it is and what to do with it first. (Sydney 40+ years)

Sometimes

- Expensive price.
- Not always available.
- Seasonal.
- Required for limited or specific dishes.
- Only some people in the family like them.
- Don't want to eat them everyday.
- Prefer them at different times of the year - perception they are suited to seasons.

You can't do a lot with them, I only buy them when I am making a specific dish. (Melbourne 25-40 years)

Now that I think about it, it's the cheaper veggies I buy all the time.... The ones I buy occasionally are expensive. (Sydney 25-40 years)

Staple

- ✓ Repetition & habit.
- ✓ Always available.
- ✓ Main ingredients in meals.
- ✓ Easy to cook and serve.
- ✓ Can cook or eat each one many ways.
- ✓ Common - can use them all the time.
- ✓ Good base for meals.
- ✓ Low risk experimentation.
- ✓ Versatile and good fillers for any meal.
- ✓ Cheap.
- ✓ Tasty.
- ✓ Fast to cook.
- ✓ Tradition - grown up with them and continue to eat them regularly.
- ✓ Can eat them raw or cooked.

Carrots are a core vegetable. You can chop them, steam them, eat them raw. They go in everything. (Melbourne 25-40 years)

Vegetables considered to be 'staple' are purchased more often and in greater quantities

What consumers need to know about a vegetable before it can become a staple

Whilst availability and seasonality are beyond the direct influence of those who grow and package Australian vegetables, they can provide consumers with some specific information to address knowledge gaps.

Addressing these gaps will increase the likelihood of any vegetable becoming a staple; regularly and habitually purchased and perceived to be the most useful and versatile.

Information requirements include:

- ✓ Multiple preparation methods;
- ✓ Multiple cooking suggestions;
- ✓ What the vegetable complements;
- ✓ How to store to retain freshness, quality and longevity;
- ✓ Specific health benefits – and why this vegetable should be included in weekly meals; and
- ✓ How to know when the vegetable is ripe and at its best – what to look and feel for.

Some vegetables are **never** bought or consumed

Other vegetables are bought **sometimes** – usually with a specific meal or recipe in mind

However, many vegetables are bought **regularly**. Every week, without fail. Regardless of what meals are planned or time of the year. These are our staples.



It is often a lack of knowledge about a vegetable that prevents a consumer allowing it to become a staple

A large, dark grey circle is centered on the page, containing the text 'Key Influences.' in white. The background of the entire slide is a high-resolution, close-up photograph of vibrant green grass.

Key Influences.

➤ Various broad factors influence vegetable buying behaviour

Consumers mentioned the following factors that impact the quantity and variety of vegetables they purchase:

- Life stage and family;
- Affordability;
- Product provenance;
- Information and health claims;
- Knowledge about storage; and
- Packaging and presentation.

These factors that influence consumers buying behaviours are discussed in detail throughout the next section.





Life Stage.

→ The influence of Life Stage



Different budget, health and time pressures at various life stages can impact vegetable purchase and consumption behaviours.



- Choices determined by parents.
- Behaviour, likes and dislikes now may impact future consumption.

- Busy lifestyle working and socialising.
- May fall into bad food habits.
- Pre-prepared salad and vegetable packs appeal to this age group.

- Busy with work and new demands such as parenting.
- New uses for vegetables such as baby food.
- May be increasing interest in personal health, eating more vegetables, or setting an example for children.

- As work slows down and children grow up, may regain some more time for self as an individual.
- May increase consumption of vegetables to decrease health risks.
- Routine and habit may have set in, and some may be unlikely to try new things at this stage.

- As people age their ability to prepare vegetables from scratch may diminish.
- Pre-prepared vegetables appeal to this age group if budget allows.
- More likely to stick to varieties they know rather than try the unfamiliar.

»»» The influence of Life Stage



Others in the household can have a large impact on the choice and preparation of vegetables

Childhood 0-18 years

Establishing
18-30 years

Intensive
Career/
Parenting 30-
50 years

Regaining
Independence
50-70 years

Older years
70+

Before I had children I was into everything fresh...but now, oh my god, I don't care as long as I'm cooking something for them.
(Sydney 25-40)

I'm in a share house with two boys who eat lots and lots. I have to buy kilos to last the week.
(Brisbane, 18-24 years)

Our choices are limited by what everyone will eat...we all have to compromise.
(Adelaide, 40+ years)

Now that it is only the two of us at home, I must admit price isn't an overriding factor. I see spending money on vegetables as an investment in our health."
(Brisbane, 30+ years)

My mum gets those sort of things (pre-packaged roast vegetables) because she finds it hard to chop herself.
(Regional WA, 25-40 years)



Families with children

Choosing vegetables for a young family involves many decisions and thought processes

Parents expressed competing pressures when it comes to buying vegetables to feed their children.

They may also be dealing with budget constraints, time pressures, fussy eaters, and dietary requirements.

Whilst all agreed that their children's health was priority, and that including vegetables in their diet was very important, at times parents can give in to the pressures and vegetable purchase and consumption suffers; for both them and their children.

Most parents know:

- Children should eat a broad range of vegetables and fresh is best; and
- Children acquire tastes when they are young.

However, some parents often:

- Buy a limited variety for their family; sticking to what they know will be eaten;
- 'Hide' vegetables in meals such as bolognaise to increase vegetable consumption unknowingly (to their children);
- Are contented their children have eaten 'something' – and less concerned that it is not fresh vegetables every day; and/or
- Rely on childcare centres to provide their children with vegetables; perceiving them to be time consuming to prepare themselves at home.

The big loose ones are just too big. She will end up eating half and it will end in the bin. Things like little carrots fit in her container for school. (Melbourne, 25-40 years)



When my daughter was a baby we fed her the same one vegetable every meal - that's what she liked. But now, in hind sight, I realise we should've stretched her. She's 9 now and we struggle to get her to eat most veggies. (Melbourne, 25-40 years)

Everything is to a routine. I literally have got half an hour to cook if I can put cartoons on and distract her. Then after her dinner it's bath, bed, bookand it's quarter to eight, so I think 'God, I don't want to get up and cut up veggies now for myself. So I don't. I might just eat some frozen ones. (Brisbane, 30+ years)

Meeting the many needs of parents

Parents are often time poor and out of ideas of how to include more vegetables in their children's diets.

Product and packaging innovations that would meet the needs of parents include:

- ✓ Baby mash packs – grab and go weekly supply of a variety of vegetables to home cook and mash. An 'ice cube' tray for freezer storage could also be included;
- ✓ Finely chopped vegetables ready to 'hide' in home cooked meals;
- ✓ Mini or lunch-box sized whole vegetables – requiring little or no preparation and washing. Just place in the lunch box and ready to go. Many parents have found great success with their children's fruit consumption with the introduction of purposely packaged lunch-box sized apples, pears and mandarins; and
- ✓ Child sized, single serving 'snack packs' as an alternative to chips or biscuits that can be eaten on the go or placed in the fridge for children to 'help themselves'.

Kids lose interest in eating so fast, and those little mini sizes kind of regain the fun. They are not big portions, not overwhelming for them. It works. (Melbourne 25-40 years)



This Canadian product combines mini-sized vegetables, perfect for lunch boxes and snacks, in fun & bright packaging. A QR code provides links to colouring pages to engage children and information for parents.

The background of the slide is a close-up, top-down view of vibrant green artificial grass. A large, dark grey circle is centered on the page, containing the text.

Budget &
Affordability.

»»»→ The influence of budget and affordability

Perceived value for money, available spending budget and affordability are all top of mind when consumers are shopping for vegetables. The impact on consumers purchases of fresh vegetables can result in:

- Buying less (quantity and frequency);
- Opting for loose over packaged/pre-prepared options;
- Buying products they know; and
- Less likely to 'experiment' or try new products.

Interestingly, to address value for money some consumers choose loose vegetables as a way of controlling their spend – erring on the side of less rather than more.

However, with the increasing absence of scales in-store, consumers are often shocked at the purchase price of their selection. The preference is to buy less than more to avoid a \$\$ shock.

The really basic staples that haven't been popular are now seen as super foods and now you're paying top dollar...some of these old veggies like parsnip used to be cheap as chips. Now you pay \$9 a kilo for parsnips. (Sydney 40+)

I really have to think about how long it might last, freshness wise, and what bills have to be paid too. I get paid fortnightly but I suppose lucky being a single parent I get my Centrelink money on the other week. (Brisbane, 30+ years)

My mum only gets paid once a fortnight so they only go shopping once a fortnight. They don't have the luxury of saying , 'Oh we will just go to Coles if we run out', they don't have that money. (Brisbane, 30+ years)

I have a set budget I want to spend on food a week so I'm only going to get a small amount of one thing. (Melbourne, 24-40 years)

Communication to reassure value for money

To encourage consumers to purchase a greater quantity and wider variety of vegetables, whilst addressing their need for value for money, industry can communicate:

- ✓ Methods to store vegetables bought in bulk – eg. fridge, freezer, pickling. Communications will need to highlight the benefits of each method and reassure consumers that quality and nutrients can be retained;
- ✓ Recipes to inspire uses for ‘left over’ vegetables (perhaps both cooked and raw) to reduce wastage;
- ✓ How packaged and pre-prepared vegetable can be of comparable price to loose alternatives;
- ✓ What to look for when vegetables are at their peak in terms of taste, quality and value; and
- ✓ How to include more variety of vegetables.

Consumers want to know how to get the best ‘bang for their buck’ when it comes to purchasing vegetables; they need guidance, inspiration and knowledge

I have seen people fill their shopping trolleys and it seems like they're spending a lot of money on things made in the factory. I think it's that we think vegetables are expensive and people don't know the value for money they could get from vegetables compared to the alternatives, notwithstanding the health issues. (Melbourne, 40+ years)

It might be \$2-\$3 for the bag of leaves and \$1.99 for a whole lettuce. The whole lettuce seems cheaper, but half the lettuce goes off in the fridge whereas I would eat the entire bag of leaves. Economically the bag is better. (Brisbane, 30+ years)

I don't even look at vegetables that are pre-prepared, I can spend my money better. (Brisbane, 30+ years)

We have a tight food budget and can't be cooking meals with tonnes of ingredients. (Regional QLD, 25+ years)

An aerial photograph of a lush green lawn. A large, dark grey circle is superimposed over the center of the image. Inside this circle, the text "Country of Origin." is written in a white, sans-serif font.

Country of Origin.



Consumers prefer Australian grown and choose it over imports unless the price is *too* prohibitive.

Participants were asked whether they bought Australian grown vegetables, and most agreed that their preference lies with local produce. However, for many, 'country of origin' is unknown.

Some expressed frustration that the country of origin was not always clearly marked in supermarkets and greengrocers. Products need to be **obviously and clearly** marked with country of origin to provide consumers with this information.

Reasons for preferring Australian grown included:

- Supporting local farmers and the broader Australian economy;
- Knowing the conditions in which the produce has been grown (i.e. in Australian conditions without pollution, dangerous pesticides or genetic modification); and
- The carbon footprint involved with importing vegetables which can be grown in Australia.



For most, provenance does not outweigh quality and freshness, however, consumers are aware of imported produce and concerns are growing about the impact on health, safety and the economy.

I don't like it when the only option is getting imported vegetables. I think it's because they go through China and New Zealand that they can get through to us. I've never liked that. (Sydney, 25-40 years)

I always try to buy Australian grown veggies, although the big supermarkets don't always make it clear so it can be hard to tell. (Regional Victoria, 25-40 years)

In Australia there are better laws, more clear about genetic modification and pesticides. (Regional South Australia, 40+ years)

A lot of Chinese vegetables are grown in soil that's contaminated with heaven knows what. And you've really got to wonder how long it takes for these products to get to Australia. What do they do to them to make them last? (Adelaide, 25-40 years)

The carbon emissions, if you're dragging your vegetables half way across the world, are screwing the environment. (Adelaide, 25-40 years)

The background of the slide is a dense, vibrant green artificial grass texture. A large, dark grey circle is centered on the page, containing the text.

Knowledge
about storage.



Knowing how to store vegetables at home, impacts the vegetables that are purchased.

Consumers admit having limited knowledge about the best way to store vegetables when they get home. They are open to information about the best methods to retain freshness and agree that if vegetables lasted longer in the home, they may purchase more.

Some consumers strictly purchase groceries weekly or fortnightly. If vegetables do not last, this can result in fresh vegetable consumption dwindling or being non-existent until the next scheduled shopping day.

Also, some consumers indicated they are 'wary' of in-store presentations that display vegetables on ice or are kept sprayed with water. Whilst they agree that these vegetables look enticing in-store, a perception exists that these vegetables may not store fresh for as long at home due to the in-store practice. This can lead to purchasing a smaller quantity to guarantee freshness.

When you buy those bags of spinach, what do you do when you open them? Do you put them in another container or what? I leave them open and they go off before I have used them all. (Brisbane, 18-24 years)

We think you have to keep things in the fridge, but they are out in the open when you buy them. I'm confused. (Sydney, 25-40 years)

When a recipe calls for a small amount for something, I reluctantly buy it, because I know the rest will go off before I can use it. (Sydney, 25-40 years)

Whilst consumers can make purchase choices based on the look and freshness of produce in-store. When they get home, they admit they have **limited knowledge** about how to store them to retain the quality.



Consumers seek more knowledge about how to store vegetables

The vegetable industry can provide consumers with the best information about how to store their vegetables at home.

Packaging provides a natural vehicle to communicate to consumers how the vegetable should be stored at home.

Messages and info-graphics at Point Of Sale (POS) would be effective for consumers buying loose vegetables.

Questions that consumers have about storing their veggies include:

- ✓ How long should this last after purchase?
- ✓ Should it be stored air tight or with air flow?
- ✓ Which vegetables should or should not be stored together?
- ✓ Should packaged vegetables be left in their package when opened?
- ✓ How can veggies be frozen at home?

I only shop once a week, and I would buy fresh vegetables to last the whole week if I knew they would last. But I get to the end of the week and the lettuce is brown for example - so we eat frozen vegetables for the last couple of days. (Brisbane, 30+ years)

I really want to be better organised and have a meal planner for the month. But I need to know how to store the veggies to make them last. (Melbourne 40+ years)

You buy a bag of them because it's a good price, and then next thing you know they are slimy or things are growing on them. It's a waste when you can't store them. (Sydney, 25-40 years)

The result of incorrectly storing vegetables often leads to wastage. This not only causes disappointment and frustration for consumers, it can also result in the consumer reducing the quantity of vegetables they purchase.



Consumers shared photos that highlight the many ways vegetables are stored in the home



Brisbane

Regional Queensland

Regional Western Australia

Perth

Regional South Australia

Adelaide

Melbourne

Regional New South Wales

Sydney

Regional Victoria

If you buy something and you don't know what to do with it and it's slimy in 2 days you will never buy it again. (Sydney, 25-40 years)

The background of the slide is a high-resolution, close-up photograph of vibrant green grass. A large, dark grey circle is centered on the page, serving as a backdrop for the main text.

Packaging & Presentation.



Loose Vegetables

Consumer advice for presentation



What consumers want

- To know where it's come from and grown.
- Fresh, colourful and attractive displays.
- Vegetables laid out 'flat'.
- Details on how to store them.
- Information about what variety suits different cooking methods best.
- Provision of scales.



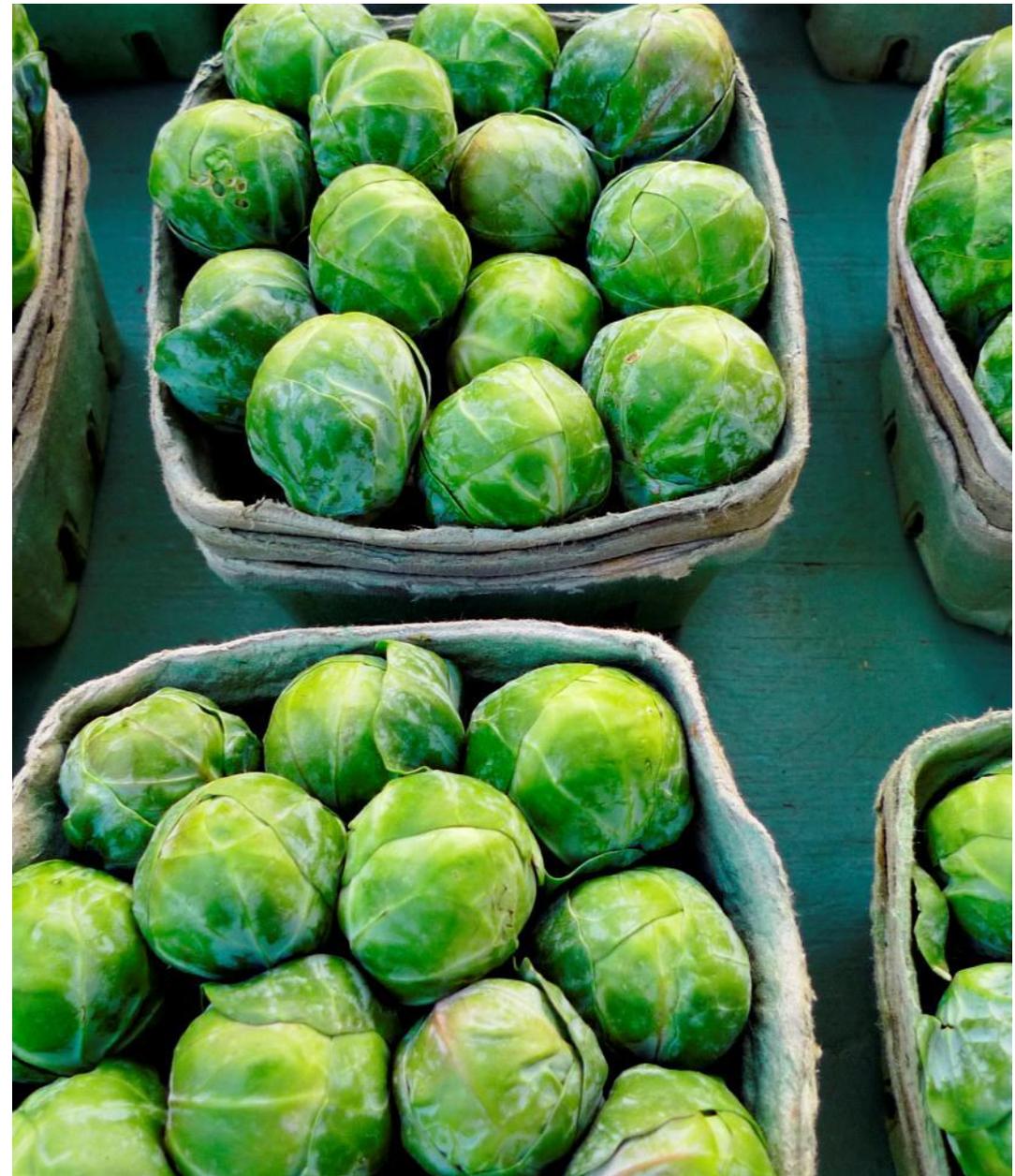
Why this encourages purchase

- In control of quantity and quality purchased.
- Making your own choices.
- Can see all the vegetables available before choosing.
- No surprises and no one to blame when you get home.



What to avoid

- Displays of vegetables that look 'over handled' by other shoppers.
- Flies.



»»»→ Packaged Vegetables

Consumer advice for packaging and presentation



What consumers want

- More varieties available in packs.
- Bundle deals.
- Multiple products in packs (beyond the winter soup pack).
- Clear, transparent packaging.
- Ability to 'see' all products in the packs (nothing hidden in the middle).
- Varying sizes to suit singles through to families.
- To know when it was packed, and how long the vegetables can be expected to last.
- Innovative packaging – compostable, breathable.



Why this encourages purchase

- Makes life easier.
- Feel inspired.
- Faster shopping time.
- Satisfied of value for money.



What to avoid

- Only larger 'bulk' quantities.
- Poor quality produce 'hidden' in the middle.
- Preservatives and additives to keep fresh.
- Mixing over-ripe and under ripe together.



➤➤➤ Pre-prepared Vegetables

Consumer advice for packaging and presentation



What consumers want

- More variety of 'ready meals' lines.
- Sizes suitable for larger families – at reasonable pricing.
- Preference for tubs rather than bags.
- Less 'filler' ingredients.
- Look colourful, fresh and appealing.
- Labelled with hints and meal ideas.
- Single serves with cutlery.



Why this encourages purchase

- Better than take-away – both health and cost.
- Provides inspiration and new ideas.
- No need to buy separate products for the one meal.
- Makes shopping and meal preparation time shorter – more time to do other things.
- Takes the pain and chore out of cooking.
- Introduction to new varieties and flavours.
- Assurance that the product is as good for you as preparing it yourself.



What to avoid

- Unnecessary packaging and wrapping.



The background of the slide is a close-up, top-down view of vibrant green artificial grass. A large, dark grey circle is centered on the page, containing the text.

Information & Health Claims.



The influence of Health Claims



Consumers are influenced to purchase vegetables that have specific health claims. Whilst the general perception is that 'vegetables are good for you', consumers feel they have, limited knowledge about specific health benefits of individual vegetable types.

Behaviours such as 'eat your greens', 'eat a rainbow every day' or 'it's full of anti-oxidants' were known, however commonly perceived rationale did not extend beyond the 'because it's good for you'.

Consumers are keen to know specific health benefits of vegetables, and believe it would increase the quantity and variety of vegetables purchased.

Knowledge of perceived claims were limited to:

- Carrots and other orange vegetables improve eyesight;
- Garlic prevents colds and flu;
- Broccoli is a good Vitamin C source when you have a cold;
- Mushrooms are brain food and 'meat for vegetarians';
- Artichokes are good for heart-health;
- Spinach thins the blood and is high in iron;
- Lettuce and celery have no nutritional value; and
- Avocados reduce cholesterol.

Knowledge about **health advantages of specific** vegetables and variants will encourage purchase.

Consumers want to know, 'So what? What is the benefit to me?'

With consideration to FSANZ* legislation, these benefits should be communicated to consumers.

*I don't really care if the Vitamin is A, B or whatever - I like to know what it does. Will it help with the look of my hair and nails and make me feel good?
(Brisbane, 18-24 years)*

*I know that certain colours of vegetables have associated health benefits - if I knew what ones, I would buy more. I don't buy or eat cabbage. I have only ever tasted green cabbage, but if I was told that 'red cabbage' has substantiated benefits, then I might buy it.
(Melbourne, 40+ years)*

A photograph of several baskets filled with fresh, green Brussels sprouts. The sprouts are tightly packed and have a vibrant green color. The baskets are made of a light-colored, woven material. A large, dark gray circle is overlaid on the center of the image, containing the text.

Key learnings
about consumers.

The background of the slide is a close-up, top-down view of vibrant green artificial grass. A large, dark grey circle is centered on the page, containing the text.

Consumers
have different
needs.

Fresh Vegetable Buyers

An Attitudinal Segmentation

- Consumers have different mindsets and attitudes towards buying fresh vegetables.
- Seven key attitudinal segments emerged, each with different motivations and needs.
- Messages, products and information that appeal to one segment are less likely to have as strong of a positive impact on the others; therefore communications need to be developed on **who** are we talking to and **what** is their motivation to encourage greater vegetable purchase.



Over the next pages we explore each segment's motivations and how their needs can be met through products, packaging information and communications.



? The 'Curious' Consumer



The 'Curious' consumer enjoys cooking and eating. They have the confidence to try new vegetables and enjoy experimenting with new ways of preparing them.

What do they want?

- To be introduced to new vegetables they haven't tried before.
- To find out new combinations or ways of preparing vegetables.

What motivates them?

- They are foodies that are seeking new tastes, textures and visual sensations.
- They like to try new things, and share their discoveries with others.

Where the motivation comes from?

- They want to avoid the grey, tasteless, bland, over cooked vegetables of their youth.
- They don't want to miss out on pleasurable meals and tastes, so are willing to try things they didn't like in the past.

What information do they need?

- How to prepare new things; sweet, savoury, raw, methods to cook.
- What complements this vegetable.

Meet Emma | Emma is 31 and she loves to cook. She reads cooking magazines and blogs and can often be found at her local Asian market seeking out vegetables and other ingredients she has never tried. She loves eating out and is taking Thai cooking classes. If she doesn't know what to do with a vegetable, she will google to find out and experiment with it.

*I have an interest in cooking, it's not a daily chore. I love doing it and love experimenting. And I love displaying it on the plate in colour.”
(Sydney, 40+)*



? Meeting the needs of the 'Curious' Consumer



Packaging Initiatives

- ➔ Sample packs containing small pieces of a variety of unusual vegetables.

Information Needs

- ➔ Preparation methods for less common vegetables.
- ➔ Recipe ideas for new ways of using staple vegetables; i.e. boiling eggplant in Asian dishes, using cucumber in cocktails.
- ➔ Information on other uses for vegetables; i.e. beauty aids.

New Products

- ➔ Stir fry and salad packs containing more unusual varieties and serving suggestions.

Communications

- ➔ Fun and engaging information about vegetables; this segment enjoys the shopping and cooking process.

Varietals of interest

- ➔ Less usual vegetables such as coloured cauliflower, kohlrabi, bitter melon, artichokes and spaghetti squash are likely to appeal to this segment.

With vegetables, I tend to be inspired as I go around the supermarket. I work off my list, plus what looks good to my eyes. (Brisbane, 30+ years)

I found an interesting pumpkin, it's a spaghetti pumpkin. You boil it whole and then cut it and the inside is like spaghetti. It put bolognese sauce on it and it was yum. (Adelaide, 25-40 years)

I actually follow a lot of food things on Instagram. Last week I made zoodles, which are zucchini noodles, which is like a replacement for pasta. (Brisbane, 18-24 years)

»»» The 'Cynical' Consumer



The 'Cynical' consumer fears that packaged or pre-prepared vegetables have been tampered with, or are poor quality and likely to go off quickly. They like to choose their own loose vegetables to ensure they get what they pay for.

What do they want?

- Loose vegetables which they can choose themselves to ensure the quality.
- Packaged vegetables that have nothing added to them that are comparable in price to loose ones.

What motivates them?

- A belief that packaged vegetables have additives, are mislabelled, are poor quality or rotten, or have been tampered with in some way during preparation.

Where the motivation comes from?

- Past experience with packaged or pre-prepared products that were disappointing.
- A feeling that they wasted their money, or that the grower or retailer tried to trick them.

What information do they need?

- Myth-busting communications to address their fears regarding additives, preparation methods and quality.

Meet Nora | Nora is 47 and is on a disability pension due to work-related back problems. She tries to stretch her budget, and nothing frustrates her more than throwing out vegetables that have gone off. She believes things aren't always as they appear, and likes to be in control. She chooses loose vegetables so she knows what she is getting and doesn't get 'taken for a ride'.

*They use the bad bits (to make salad packs), and what's left on the floor. Bits of lettuce, bits of this and that....and cheap mainly fillers.
(Adelaide 25-40 years)*



Meeting the needs of the 'Cynical' Consumer

Packaging Initiatives

- Clear labelling for all packaged vegetables stating NO additives or allergens.
- Breathable or compostable bags which keep salad leaves and vegetables fresh for as long as possible.
- Grades on loose vegetables to easily distinguish the quality of the product.

Information Needs

- Information about how vegetables are prepared, for example what salad leaves are washed in.
- Details of where the product comes from, is grown and packaged.

New Products

- 'Pick your own' salad section so they can choose desired quantities.

Communications

- Myth-busting communications to reassure that packaged vegetables do not have additives.
- 'How to' storage booklet educating how to store vegetables to maximise shelf life of packaged vegetables.

Varietals of interest

- Seasonal vegetables that provide value for money.

I don't like how they put wax on fruit and vegetables to make them look good, we're not superficial idiots. (Adelaide, 25-40 years)



I base most of my shopping choice on price as I am not in a good financial position but it doesn't mean it's better just because it costs more, sometimes the more expensive items have had more treatments. (Regional WA, 25-40 years)

I don't buy pre-packaged, I often find the rotten ones get hidden under the other ones. If I do buy pre-packaged I am always looking to see if it's sweating on the inside...because if it is I think it has been allowed to warm up and then been cooled again. (Brisbane, 30+ years)

You know they bleach baby carrots and sometimes they are old big carrots just cut down to size. (Brisbane, 30+ years)

I wonder whether they peel the skin off, or burn it off with acid. (Brisbane, 18-24 years)

! The 'Set in my Ways' Consumer



The 'Set in my Ways' consumer is happy choosing the same vegetables and preparing them in the same ways. They usually stick with the familiar vegetables they grew up with.

What do they want?

- ➔ Good quality and well-priced staples which they can buy in the format that suits them.

What motivates them?

- ➔ Keeping the household happy with simple meals which they know will be eaten.
- ➔ Not having to spend too much time buying or preparing vegetables.

Where the motivation comes from?

- ➔ The frustration of past experiences of cooking something different which the family didn't eat.
- ➔ A desire to use time and head space for things other than meal planning.

What information do they need?

- ➔ Substitution ideas for staples when they are not in season.
- ➔ Ideas to extend their uses for vegetables.

Meet Val | Val is 53 and is retired. She and her husband are empty nesters, and her first grandchild is on the way. Val sticks to what she knows with her choice of vegetables and preparation methods, serving similar meals to what she grew up with. Her husband wouldn't have it any other way.

You cook what you're comfortable with or what you know, and when you're time short you do what's convenient and that becomes what you know. (Adelaide, 25-40 years)



! Meeting the needs of the 'Set in my Ways' Consumer

Packaging Initiatives

- ➔ They prefer to either buy loose, or large bags of staple vegetables.
- ➔ Large boxes which don't squash the produce may appeal.

Information Needs

- ➔ Substitution ideas for seasonal items when they are unavailable.
- ➔ Graded staple vegetables (such as carrots) enabling them to buy the grade suitable for their purpose (i.e. stewing/salads).

New Products

- ➔ Common vegetable boxes containing enough staple vegetables to last a family a week may encourage broadening the repertoire.

Communications

- ➔ Vegetable storage booklet.

Varietals of interest

- ➔ Stick to common staples like potatoes, corn, peas, carrots and pumpkin.

*My husband only eats corn and potatoes.
(Regional WA, 25-40 years)*

*I am old school cooking. I am from a Russian background and just cook old traditional foods and that just means root vegetables.
(Brisbane, 18-24 years)*



*I grew up on a farm and the staples like carrot and potatoes have stuck with me. I don't feel a meal is complete without potato in some form.
(Regional WA, 25-40 years)*

I think you need to get ideas out there about how to make vegetables more interesting. A lot of people cook veggies in a simplistic way that makes them boring. (Adelaide, 40+ years)



The 'Seeking Inspiration' Consumer



The 'Seeking Inspiration' consumer would like to increase the variety of vegetables they eat, but lack the time, knowledge and confidence to experiment.

What do they want?

- ➔ Ideas for how to incorporate both more vegetables and a greater variety of vegetables into their regular meal plans.

Why motivates them?

- ➔ Preparing meals with more interest both visually and from a taste perspective.
- ➔ Extending their repertoire and broadening their horizons.

Where the motivation comes from?

- ➔ They fear being stuck in a rut and eating the same old thing every week.
- ➔ As they lack confidence, they need direction and motivation from a perceived expert; i.e. a foodie they know or a TV chef.

What information do they need?

- ➔ Alternative preparation methods.
- ➔ Uses for unfamiliar vegetables.
- ➔ Substitutions and similarities between vegetables.

Meet Andrew | Andrew is 39 and is a financial planner. His wife recently had her second baby so Andrew has taken over cooking dinner to help her. He'd like to extend his repertoire of meal ideas and vegetables, but is stumped when it comes to recipes or new cooking methods and doesn't know where to look so he tends to stick to the tried and true.

I have started getting Aussie Farmers Direct boxes - I love it because it's the luck of the draw. I open the box and say 'Wow, ok what do I do with that?', and they give you a recipe idea. (Melbourne, 25-40 years)



Meeting the needs of the 'Seeking Inspiration' Consumer



Packaging Initiatives

- ➔ Sample size packs offering smaller pieces of a wider variety of vegetables to encourage trial.

Information Needs

- ➔ Substitution ideas for similar vegetables to extend the repertoire, or for when their regular purchases are not in season.

New Products

- ➔ Mixed vegetable box with good variety, enough produce to last a week and recipe ideas included.

Communications

- ➔ Product demonstrations in supermarkets and green grocers offering taste tests of less common vegetables and showing how they can be used.
- ➔ Suggestions for using common vegetables in less usual ways; i.e. raw asparagus in salads, cucumber in stir fries.

Varietals of interest

- ➔ Artichokes, asparagus, kale, fennel, eggplant.

I have no idea about buying eggplant. Should it be soft, firm, dark purple, light purple or should there be green tinges? I need a bit of information about when they are ripe and ready to go.
(Brisbane, 30+ years)

Jamie Oliver motivated me a lot, he is on TV almost every week with his 15 minute meals...he is very healthy.
(Adelaide, 25-40 years)

My mum is a dietician and she sends me a lot of emails. She tends to give me weekly plans as well for the kids, it helps, and it gives me a direction.
(Sydney, 25-40 years)

Maybe they can have recipe things in the ads, maybe next to some of the more obscure vegetables and say what it tastes like, and what it goes with.
(Adelaide, 40+ years)

They could have a little screen in the supermarket veggie area with a new vegetable every week saying 'you can do this with it'.
(Adelaide 25-40 years)

»»» The 'What's Next?' Consumer



The 'What's Next?' consumer is a convert to eating fresh vegetables, and consumes a wide variety in large amounts. They're leaders and are always looking for the next new trend in food and health.

What do they want?

- ➔ Locally grown vegetables with high health and nutritional benefits.
- ➔ Ingredients and products which align with their current interests.

What motivates them?

- ➔ A true belief in the health benefits of vegetables...they are converts to the vegetable cause.
- ➔ Eating to prevent health issues later in life.

Where the motivation comes from?

- ➔ A belief that eating healthy vegetables will give them the strength and energy to deal with life's challenges and keep them safe from harm.

What information do they need?

- ➔ Specific health claims and benefits of less commonly known vegetables.
- ➔ Where the vegetables were grown.

Meet Holly | Holly is 42 and works as an academic. She grows her own vegetables and sneaks them into everything, including beetroot chocolate cake! She's a self-described 'health nut' who loves 'Meat Free Monday' and has recently taken up juicing vegetables. She's frustrated when she's not able to find locally grown and organic ingredients like kale at her local supermarket.

I've been on a health kick for the last 6 months and we have more spinach and kale in the house than we did before. I love kale chips, they are so yummy. (Regional WA, 25-40)



Meeting the needs of the 'What's Next?' Consumer

Packaging Initiatives

- ➔ More lunch and snack packs allowing them to easily consume vegetables anywhere and anytime.

Information Needs

- ➔ Labelling including where the produce was grown (even down to farm level).

New Products

- ➔ Snack packs / on the go products including raw vegetables.
- ➔ Juicing packs.

Communications

- ➔ Specific health claims for particular vegetables.
- ➔ Other uses for vegetables such as beauty aids.

Varietals of interest

- ➔ Greater range of organic vegetables.
- ➔ Super foods such as green and dark purple vegetables.



"I always buy an organic box from a local delivery service that is picked from all the local growers. All the produce is fresh and looks amazing."
(Regional WA, 25-40 years)

I started reading about the immune system because I have a few problems like thinning hair. I gave up sugar and now my snacks look really different, carrot sticks and snow peas and tomatoes instead of chocolate.
(Adelaide, 25-40 years)

I want to know if it'll make me look good. Tell me that and I'll eat it. (Melbourne, 25-40 years)



♥ The 'Following Dr's Orders' Consumer



The 'Following Dr's Orders' consumer has been forced to change their behaviour due to a diagnosed health condition. They have not had the healthiest diet in the past, and are seeking a healthier lifestyle and specific health benefits from fresh vegetables.

What do they want?

- Vegetables and meal solutions which will help them be healthier and prevent illness.

What motivates them?

- They already have diagnosed health conditions.
- They are changing their behaviour regarding vegetable consumption on doctor's orders, in order to arrest or prevent further illness.

Where the motivation comes from?

- They have been given a 'wake up call' and fear more serious health issues if they don't change their eating habits.

What information do they need?

- Specific health benefits of various vegetables; i.e. combining vegetables to lower G.I., specific vegetables good for conditions such as cancer/heart health/eye health or liver function.

Meet Ron | Ron is 45 and works full-time as a bookkeeper. He's recently been diagnosed with Type 2 diabetes and is overweight. He's always been a 'meat and potatoes' man, but his doctor has told him he needs to eat more vegetables. He's been doing some research and is slowly expanding his vegetable repertoire. But if it was up to him he'd prefer a bowl of chips.

For a while now I have been trying to stick to a low G.I. diet so I avoid carbs. I'm always looking for what I can put with pasta that's going to taste reasonably good, like spinach. (Melbourne, 40+ years)



Meeting the needs of the 'Following Dr's Orders' Consumer

Packaging Initiatives

- Convenience and pre-prepared products which reduce work and make it easier for them to eat vegetables.

Information Needs

- Healthy vegetable replacements to approximate less healthy items; i.e. zucchini noodles or cauliflower rice.
- Comparative vitamin and mineral content of vegetables.

New Products

- Juicing pack.
- Lunchbox salad packs.
- Roast vegetable packs not including white potato.

Communications

- Specific health benefits beyond what the vegetables contain, but also what they will do for you; i.e. lower G.I., heart health, reduce risk of cancer.

Varietals of interest

- Sweet potato, zucchini, cauliflower.



I have to be careful because my daughter is coeliac and I get reflux with certain foods, that's why I don't eat them as much.

(Melbourne, 40+ years)

You hit 50 and it's a continual battle so you put away chips and mash potatoes and put on more veggies. It's also quite handy for my son because he was diagnosed with an immune disease this year so I'm trying to get him to eat healthier too.

(Adelaide, 40+ years)

I think when they make a health claim it needs to be comparative. Telling me it's got vitamin C means nothing unless you compare it to other veggies. So if you gave me a list of all vegetables and vitamin C content per 100 grams that would help.

(Sydney 25-40 years)

»»» The 'Do it for Me' Consumer



The 'Do it for Me' consumer wants to increase their vegetable intake, but they are time-poor. They are seeking a greater range of pre-prepared products that are quick and make life easier.

What do they want?

- Quick and convenient vegetable and salad meal solutions.
- Healthy alternatives to fast food and takeaway.

Why motivates them?

- They know vegetables are good for them, and want to increase their intake without too much effort, time or expense.

Where the motivation comes from?

- At heart they believe that creating healthy meals from scratch takes more time than they are willing to spend; they'd rather be doing something more interesting.

What information do they need?

- Information on quick preparation of vegetables.
- Greater awareness of the wide range of vegetable and salad meal solutions already available.

Meet Jake | Jake is 28 and is working in a call-centre while he studies teaching part-time. He works during the evenings, and has little time to exercise or prepare healthy food. He is health conscious and wishes there was a greater range of salad and vegetable packs that he could take to work for dinner.

*"I buy a lot of pre-packaged salads and stuff which I have at work every day. I shop 2-3 times a week and that will do me for 3 days."
(Brisbane, 30+)*



Meeting the needs of the 'Do it for Me' Consumer

Packaging Initiatives

- A greater range of 'on the go' packaging such as shell packs, microwaveable packs, packs including cutlery.

Information Needs

- Clear labelling on what is contained in accompanying sauces and dressings.
- Suggestions for things to serve with pre-prepared packs.

New Products

- Baby mash pack.
- Juicing pack.
- Greater range of lunchbox salad and vegetable packs, and with more variety in flavours; i.e. Indian or Moroccan.
- Salad or veggie packs and meal solutions combined with protein (i.e. tuna, egg, meat, legumes) or grains.
- Choices of dressings.

Communications

- Increase awareness of the range of pre-prepared packs available, and their uses.

Varietals of interest

- Unusual salad leaves and vegetables.



Salad packs are a good option when everyone is having a carb-loaded lunch in the food hall. (Regional South Australia, 40+ years)

I am really busy and don't get home until 6 or 7, and then I don't feel like cooking. I am all for pre-packaged stuff, so all you have to do is add a bit of dressing and meat. (Brisbane, 18-24 years)

Things in packs help you make easier meals. Hubby will cook meat on the BBQ and we used to make all our salads but it's got to the point where we get them pre-done because we don't have time. (Adelaide, 25-40 years)

The background of the slide is a close-up, top-down view of vibrant green artificial grass. A large, dark grey circle is centered on the page, containing the text.

Communicating
with
consumers.



Appealing to the consumer segments

Example; Brussels Sprouts



Most consumers told us they rarely purchased Brussels Sprouts. So what is required to encourage purchase?

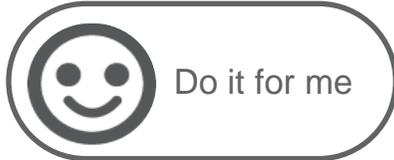
Each distinct consumer segment seeks different information to trigger purchase.



Cynical



Need to **see every vegetable in the pack** to assure them that none are rotten or poor quality. They need to know that **no preservatives or additives** have been involved in the packaging process. Who grew it, when it was picked and a freshness indicator will also appeal.



Do it for me



Need the vegetable to be **washed, peeled and ready to go**. **Instructions on how to quickly prepare** and cook the vegetable will appeal.



Curious



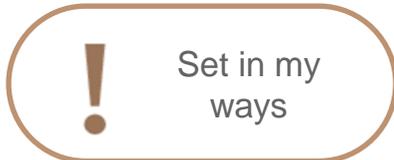
Need to know that the vegetable will **add colour, texture and flavour** to their cooking. Tips on cultural methods and flavours when cooking the vegetable will also appeal.



Following Doctor's orders



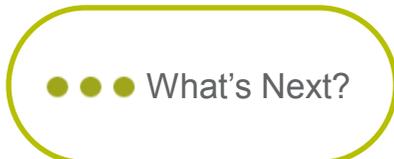
Need to know the **nutrient and health breakdown** of the vegetable such as GI, carbohydrates and sugar content. If the vegetable can reduce cholesterol, assist with blood pressure or weight loss the vegetable will appeal.



Set in my ways



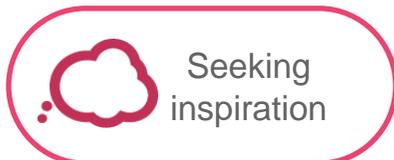
Need to know how **best to store** the vegetable to ensure longevity of quality and freshness, and how the vegetable can become as useful and versatile as their regular 'staples'.



What's Next?



Need to know what **specific health and well-being benefits** the vegetable will give **them**. Also information about how the vegetable is best prepared for the most effective results, and why the vegetable is better than a vitamin supplement or other alternatives will appeal.



Seeking inspiration



Need **guidance and hints** about what to do. Flavours that will complement **and cooking methods** that break their negative memories of the childhood experiences with this vegetable. Ideas on how this vegetable can be an accompaniment to other ingredients.

Consumers are open to receiving information whilst they are shopping

Consumers perceive the most effective way to communicate with them is in-store whilst they are shopping.

Whilst many understood that information is available to them if they were determined to seek it out, most agreed that they were unlikely to go out in search of the information about vegetables that they desire.

Suggestions for in-store communication channels included:

- ✓ Demonstrations and sample tasting;
- ✓ iPads at the end of every row;
- ✓ Serving suggestions – posters;
- ✓ Take home recipe cards;
- ✓ 'How to' storage booklet; and
- ✓ Quick Response Codes (QR Codes) on products.

Consumers indicate they are most receptive to information about vegetables whilst purchasing.

Many acknowledge that information out of store is available, but they are less likely to proactively search for it.

I am really busy and don't get home until 6 or 7, and then I don't feel like cooking. I am all for pre-packaged stuff, so all you have to do is add a bit of dressing and meat. (Brisbane, 18-24 years)

Our local grocer walks around with a knife in his hand and if you want an apple he cuts it in half and lets you taste it. He constantly does it with children, he says 'Taste it'. I have spent twice as much just by letting me get involved and choose what I want. (Melbourne 25-40 years)

You need something in-store for people like me – I don't do anything online. (Brisbane, 30+ years)

Active communication campaigns with consumers are valuable.

Mass media 'fresh produce specific' campaigns have strong cut-through. Campaigns of the past still hold impact for those who can remember them, and consumers agree these types of campaigns appeal and are effective.

Campaigns mentioned, whilst limited, included:

- Mushrooms – meat for vegetarians;
- Bananas – Na Na, No No; and
- 'What, no potato?' – with Con the Fruiterer.

Recall of recent communications or advertising campaigns was limited. Some mentioned:

- Weekly 'market day' emails from IGA including specials and recipes; and
- TV advertisements about 'what's in season' by either Coles or Woolworths, but unsure which company produced them.

Active communication campaigns are valued. Whilst most consumers understood they could increase their knowledge about vegetables and their benefits by researching on the internet, most were not currently doing so. Seeking recipes once a product was bought was the main internet search conducted. Campaign communications should give health messages and direction to online resources.

Consumers are keen to go 'online' to increase their knowledge of vegetables, however lack spontaneous recall of specific sites to go to for comprehensive advice. Industry need to heavily promote consumer focussed sites to drive visitation.

Produce-specific campaigns are effective for education and persuasion.

Many have retained health choice messages learned from past campaigns and indicate their on-going impact when making choices for themselves and their family.



Conclusions & Recommendations.



Key Findings & Recommendations



The following overall recommendations apply broadly to the fresh vegetable category and are aimed at meeting the needs of all fresh vegetable consumers.



1. Consumers are seeking more information about the fresh vegetables they eat

Recommendation:

Introduce a consistent, industry-wide labelling system for packaged vegetables

The labels should be in info-graphic style, using simple icons. Information required includes:

- Storage recommendations;
- Where the product was grown (state, region and farm);
- When it was picked and packed;
- Characteristics;
- Specific health claims; and
- How to prepare.

2. Consumers are unsure of how to correctly store vegetables, leading to wastage and a reluctance to purchase large quantities

Recommendation:

Promote and distribute information on the correct storage of vegetables

To improve value for money and reduce wastage, information should be available at POS (supermarkets and grocery stores), on packaging if possible and externally (i.e. booklet or website).

Information should include:

- Storage recommendations (i.e. remove from packaging, store in the fridge or a dark pantry);
- Seasonality and when various varieties are at their best; and
- Factors which increase spoilage (i.e. storing with other produce such as bananas).

3. Many consumers are willing to pay a reasonable price premium for Australian grown produce

Recommendation:

Clearly label Australian grown produce

Consumers care about the country of origin of fresh vegetables for a number of reasons:

- Support for the Australian (local) vegetable industry and our economy;
- Concern about the environmental impact of imported vegetables;
- Fear imports are produced in polluted conditions and aligned to Australian standards; and
- While the price of Australian grown must be competitive, there is a clear market for Australian grown – ensure it is clearly labelled.

4. Consumers feel the cost of fresh vegetables is increasing, and are seeking ways to stretch their budget

Recommendation:

Introduce initiatives to help consumers get greater value

Initiatives could include:

- A and B grade quality vegetables;
- Suggestions for substitutions for out of season vegetables;
- Transparency of costs of loose vegetables by making scales available; and
- Offering a greater variety of pack sizes in packaged vegetables so consumers only buy what they need.



5. Consumers know very little about specific health benefits of certain vegetables

Recommendation:

Communicate specific and personal health claims of various vegetables to drive choice

- In consideration of budget available and FSANZ* legislation, the vegetable industry should communicate detailed health and personal benefits known to specific vegetable or groups of vegetables;
- Investment has ongoing value, as campaigns of the past still provide strong cut-through on reasons to choose specific products;
- Communications must be in consumer speak. They must communicate a personal benefit beyond the vitamin and mineral message; and
- Communicating that different varieties of a vegetable might have different tastes and functionality will also expand the repertoires of consumers.

6. Consumers need to be assured that packaged vegetables are as high a quality as selecting them themselves

Recommendation:

Utilise the packaging of vegetables to communicate the quality attributes

- Packaging to be 'honest' – clear and transparent to allow consumers to 'see' all the produce inside;
- Arrange vegetables flat – to avoid rotten ones in the middle; and
- Provide varying sizes – not just 'bulk buys'
- Include details on when the product was packed, when to consume by or how long to expect the product to last.

*Food Standards Australia New Zealand

7.

Seven distinct attitudinal consumer segments have emerged among fresh vegetable purchasers

Recommendation:
Quantify the consumer segments

The recommendations made within each segmentation group will meet the needs of some but not all consumers.

- The consumer segments should be quantified in order to find the most significant group to direct efforts; and
- Industry should prioritise and focus on activities and initiatives which will meet the needs of the largest consumer groups in the segmentation.



A large, solid dark grey circle is centered on a bright yellow background. Inside the circle, the word "Appendix." is written in a white, serif font.

Appendix.



Consumer feedback
on product and
packaging
innovations from the
US and UK.

The background of the slide is a high-resolution, close-up photograph of a lush green lawn. The grass blades are densely packed and show natural variations in green color. A large, dark grey circle is superimposed over the center of the image, serving as a backdrop for the text.

Individually
packaged varieties.



Plain Packaged Leaves

**Compostable bag



- Appeals to the ‘Cynical’ consumer, ‘Set in my Ways’ consumer and those concerned about the environment.
- Perceived to be good for providing convenient packaging that’s safe for the environment.
- Less appeal for the ‘Seeking Inspiration’ consumer.



I wouldn't pay more for a compostable bag. I used to think about that sort of stuff, but now I think that if 1 billion people in China don't care, then how can I make a difference. (Sydney 25-40 years)



Positive elements

- Clearly see the product.
- Brown paper bag look is appealing.
- Paper bag perceived to be ‘breathable’ reducing chance of slimy leaves.
- Compostable bag.



Negative elements

- Perception the product may dry out.
- Product lacks colour.
- Brown paper hides some of the product.
- Too basic an idea – not innovative.
- Wouldn't pay more for a compostable bag.



Ideas and Improvements

- Outline the benefits of the paper bag/ compostable bag – address how if it can or should it be stored in fridge as is.
- Half paper half plastic bag may be a good idea for other vegetable aside from green leaves.



Plain Packaged Vegetables



**Microwavable bag

- Appeals to the 'Set in my Ways' and 'Do it for Me' consumers.
- Perceived to be good for quick meal preparation.
- Less appeal for the 'Cynical' consumers, large families and the cost conscious.



Cutting butternut squash takes so long, and stains everything orange. So there's no need to wear gloves. (Brisbane, 18-24 years)



I like that the vegetables all seem to be in a single layer. You can see everything. (Brisbane, 30+ years)



Positive elements

- No vegetable is hidden on the bottom or middle - good quality check.
- See through packaging and informative labelling.
- Cuts down on annoying prep of pumpkin/beetroot (i.e. hard to chop/stained hands etc).



Negative elements

- Microwaving bag not appealing.
- Not enough information about the variety, preparation methods.
- Some see no obvious benefit compared to buying product loose.
- Perception uneven product sizes – could impact cooking times.



Ideas and Improvements

- The simple, clear packaging could be used for many other vegetables.
- Potential to add important information about the product without covering all the produce from view.

An aerial photograph of a lush green lawn. A large, dark grey circle is centered on the lawn, containing the text 'Heat and Eat Products.' in white. The grass is vibrant green and appears to be a mix of different varieties.

Heat and Eat Products.



Heat and Eat Vegetables



- Appeals to the 'Do it for Me', 'Seeking Inspiration' and 'Following Dr's Orders' consumers.
- Perceived to be good for increasing vegetable consumption easily.
- Less appeal for the 'Cynical' consumer.



This would encourage me to have two veggies a night. Carrots are a staple, and I like the addition of beans which is something I don't usually buy. (Brisbane, 30+ years)



These are the vegetables I usually eat – so I could see myself buying this as a treat if I wanted to be lazy. Much prefer fresh than frozen. (Sydney, 40+ years)



Positive elements

- Great for older people and singles.
- No need to buy whole heads or packaged of products.
- Less wastage (stems etc).
- Convenient.
- Preferred alternative to frozen.
- Pre-prepared, but not too processed.
- A way to include more unusual vegetables along with staples.



Negative elements

- Perception that different vegetables have different cooking times.
- Very large 'chunks' that may still need some chopping before cooking.
- Some basic combinations – no innovation.
- Package sizes not suitable for larger families.



Casserole and Soup Mix Bags



- Appeals to the 'Set in my Ways' and 'Seeking Inspiration' consumer.
- Perceived to be good for speeding up 'homemade' meals
- Less appeal for the 'Cynical' and 'Curious' consumer.



I love it. The more time I can save chopping vegetables for soups and casseroles the better. This is great. You could put a home cooked meal together in no time at all. (Regional SA & VIC, 25+ years)



Everything you need is in there, and probably something like parsnip is a vegetable I wouldn't normally buy. It's all cut up and ready to go. (Brisbane, 30+ years)



Positive elements

- Great for a meal when preparation time is limited.
- Good for busy families.
- Good when storage space is limited.
- Retains 'homemade' benefit.
- Contains good range of vegetables – particularly leek and parsnip appeal.



Negative elements

- Concerned they may have been washed in 'something' before packaging – to retain freshness.
- Fear the products may have lost flavour in the chopping and packing process.
- 'Sickly' overall colour palette.
- Appears to look par-cooked.



All you have to do is get home from work, stick it in a pot with some stock, come back and it's ready ...supposedly. I like it. (Sydney, 25-40 years)



Roasting Vegetables



- Appeals to the 'Do it for Me' consumer.
- Perceived to be good for older people who may have difficulty chopping and preparing vegetables for themselves.
- Less appeal for the 'Cynical' and 'Curious' consumers, and the cost conscious.



It ticks all the boxes. It looks good, seems better than eating frozen vegetables and has all the information I want on the label without hiding the vegetables inside. It tells me; they are washed and ready to use, fully prepared, to keep it refrigerated below 5 degrees. It also says the date it was displayed and the date to use by. (Brisbane, 30+ years)



Positive elements

- Interesting combinations.
- Great for students and older people.
- Quick and convenient.
- Easy way to get good serve of vegetables.



Negative elements

- Preference for larger pieces when roasting.
- Fear the sauce and butter added may be overly processed or unpleasant tasting.
- Unsure of ingredients contained in sauces and dressings – perception they may not be clearly labelled.



Ideas and Improvements

- Could also include potato – a roasting favourite.
- Could also be packaged for stir-fry varieties.



Stir Fry Mixes



- Appeals to the 'Do it for Me', 'Seeking Inspiration', 'Curious' and 'What's Next?' consumers.
- Perceived to be good for the time poor and older people who may have difficulty chopping and preparing vegetables for themselves.
- Less appeal for the 'Cynical' consumer and the cost conscious.



Great for that emergency situation. No need to waste time on cutting. (Sydney, 25-40 years)



Positive elements

- Interesting combinations encouraging to try something new without buying whole vegetables.
- Great for students and older people.
- Save on fridge storage space - don't need to buy entire vegetables.
- Inclusion of unusual vegetables.
- New flavour combinations and encourages experimentation.



Negative elements

- Portion size too small for families.
- Too much filler and less interesting vegetables in some mixes.



Ideas and Improvements

- Could also be used raw in salads and for other uses.

An aerial photograph of a lush green lawn. A large, dark grey circle is superimposed over the center of the image, containing the text "Eat on the Go Products." in white.

Eat on the Go
Products.



Carrot Snack Bags



- Individual portions appeal to the ‘Do it for Me’ and ‘What’s Next?’ consumers.
- Good for school lunches or a healthy snack.
- Less appeal for the ‘Cynical’ consumer.



The carrots just don't look real...and who wants chilli and lime on their veggies? (Brisbane, 30+ years)



I know from experience that they might call these things ‘baby carrots’ but they are just big, old carrots ground down to look smaller. And if you read the label, I bet they have added sugar. (Brisbane, 30+ years)



Kids love anything in a packet. (Regional SA & VIC, 25+ years)



Positive elements

- Good for school lunches.
- Bright packaging.
- Alternative to processed snack foods.
- Carrot would stay moist.
- ‘Baby’ sized appeals to children.



Negative elements

- Perceived to be gimmicky.
- Cannot see the vegetable inside.
- Concerns about authenticity of the product – looks artificial and fear preservatives are added.
- Dressing and flavours disliked.



Ideas and Improvements

- Could also be included in salads.
- Needs to be a comparable price to and positioned near products such as ‘Arnott’s Shapes’ – better health alternative.
- Could be used for other vegetables such as baby cucumbers.
- Clear packaging.



Salad Packs



- Appeals to the 'Do it for Me' and 'Following Dr's Orders' consumer.
- Perceived to be good for meals at work.
- Less appeal for those on a tight budget large families.



It needs something else in there – yellow capsicum or something bright. (Sydney, 40+ years)



If I was having visitors and I needed lettuce, I might buy this and add other things to it. It would save a bit of time preparing. (Sydney, 40+ years)



I never make a full Greek salad, because you need too many things. But this has all the nice ingredients together – so easy. (Sydney, 40+ years)



Positive elements

- Look healthy and fresh.
- Single serve quantity.
- Great for taking to work and eating on the run.
- Vegetables look fresh and crisp.
- Appealing to have cheese and dressing separate to be mixed before eating.



Negative elements

- Perception the lettuce on the bottom might be soggy and/or brown.
- Variety is bland – nothing new or different.
- Too expensive to feed a large group or family.
- Too much lettuce, less of the more interesting ingredients.



Ideas and Improvements

- Could be packaged with a protein source such as meat or legumes.
- Could be sold with mini bottles of dressing separately – choose flavour.



Meals Packs with Protein



**Biodegradable packaging

- Appeals to the 'Do it for Me' and 'What's Next?' consumers.
- Perceived to be good for providing a full, balanced meal on the run.
- Less appeal for the 'Set in my Ways' consumer.



Coles are heading this way with products like this – but they are a bit stodgy like lasagne. This is light and fresh. (Brisbane, 30+ years)



This is great, something I could just grab at lunch time. (Brisbane, 30+ years)



Positive elements

- Easy to eat, meal on the run.
- Nothing to add – a complete meal.
- Great lunch idea.
- Valued inclusion of a protein.
- Light meal – not stodgy.
- Preferred fast alternative to 'junk food'.
- Label and colours are vibrant, lively and appealing.



Negative elements

- Needs more variety of vegetables.
- Sticker and label covers too much of the product.
- Too heavy on the pasta content.
- Health and hygiene concerns of mixing fish with vegetables.



Ideas and Improvements

- The fish should be packaged separately – mix in yourself before eating.
- Include calorie count.

»»» Veggie Pot with Grains



This is the next step of the pre-made salads. (Sydney, 25-40 years)

- Appeals to the 'Do it for Me', 'Following Dr's Orders', 'What's Next?' and 'Seeking Inspiration' consumers.
- Perceived to be good for increasing vegetable intake.
- Less appeal for the 'Set in my Ways' consumer.



Mexican sweet potato and brown rice - yum! (Sydney, 25-40 years)



It's lunch on the run or at work. Or you could just add meat and it would be dinner. I like that it has three portions of veggies. (Sydney, 25-40 years)



Positive elements

- Three portions of veggies.
- Clearly labelled.
- Perceived to be tasty.
- Lunch on the run or at work.
- Can be eaten hot or cold.



Negative elements

- Perception it will be expensive.
- Unsure how long it will last or remain fresh after purchase.



Ideas and Improvements

- Greater range of flavours and varieties; e.g. Moroccan or Japanese.
- Greater range of grains; e.g. Quinoa.

The background of the slide is a dense, vibrant green artificial grass texture. A large, dark grey circle is centered on the page, containing the text "In-store Display." in white.

In-store Display.

»»» Pick 'n' Mix Salad Bar



- Appeals to the 'What's Next?', 'Do it for Me', 'Seeking Inspiration' and 'Following Dr's Orders' consumers.
- Perceived to be a good lunch choice and/or for meals on the go.
- Less appeal for those concerned about hygiene.



*I can see this working – but we would need to be educated to buy products like this. You can't buy nuts and lollies like that anymore here – they stopped it. It would work in New Zealand right now because they are used to this type of thing. They buy lots of things in bulk – you fill a bag, weigh it, label it and throw it in your trolley.
(Brisbane, 30+ years)*



Positive elements

- All chopped up and ready to go.
- Colourful.
- Can try veggies you wouldn't usually buy.
- Fresh alternative to frozen vegetables.
- Can control how much you buy (quantity) and spend.
- Employment opportunities –chopping up.



Negative elements

- Perceived it will be expensive.
- Possible 'sneeze' factor if open to the public and over handling.
- Product may be sitting out for undisclosed amount of time.
- Concerns may not be able to wash it if already sliced.



Ideas and Improvements

- Operate like a supermarket deli – someone in charge of serving – would be a social experience too.
- Set price per kilo – regardless of product.

➤➤➤ Refrigerated Units



- Appeals to 'What's Next?' and 'Seeking Inspiration' consumer.
- Less appeal for the 'Cynical' consumer (too many packaged vegetables).



You could take it one step further – actually have some vegetables still in the dirt. People would pay extra to pick their own carrots. (Brisbane, 18-24 years)



Positive elements

- Vegetables would be fresher for longer.
- Less cross contamination (people handling the vegetables) as not out on display.
- Fun shopping experience – tactile, you can pick things up because they are packaged.
- Alternative suggestions displayed above the fridge.
- Limits time out of the fridge from shop to home.
- Would be stacked from the back, so stock keeps moving.
- Displayed and stored at a constant temperature.
- Organised and easy to find things.



Negative elements

- Concerns with energy consumption to run the fridges.
- Difficult to access in busy shopping times.
- Concerns of how long the product has been in the fridge.



Ideas and Improvements

- Could include a shelf of vegetables still in the dirt – pick your own.

Organics Range and Shelving units



- Appeals to the 'What's Next?' and 'Following Dr's Orders' consumers.
- Perceived to be good for the broad range of organics.
- Less appeal for the 'Cynical' consumer.



Everything is there in neat little sections, and looks like things would be easy to find. If you want herbs, each herbs has it's own little cartoon. Sometimes when you are looking for herbs they can be hidden away in random places in the supermarket. You have to shuffle through all the stuff on the shelves to find it . (Brisbane, 30+ years)



Positive elements

- Comprehensive organic section.
- Offers choice of organic or not.
- Colourful, fresh and enticing to buy.
- Logical order to display.
- Similar products displayed together.
- Visually appealing.
- Organised and easy to find things.



Negative elements

- No significant negatives mentioned.

