

A photograph of a grocery store's produce section. In the foreground, there are several clear plastic containers filled with fresh strawberries. Behind them, a large pile of dark green avocados is visible. Further back, there are stacks of bright orange oranges and some green leafy vegetables. Price tags are visible in the background, showing prices like '\$4.98' and '\$3.65'.

# Drivers and Barriers for Produce Consumption in **Australia**: An Occasion- Based Study

## *Executive Summary*

This report is part of the Produce Marketing Association's (PMA's) series of global consumer insights reports, fielded by research firm NOW WHAT. It explores Australian consumers' decision-making process during six key eating occasions and provides insight into how to position produce for increased consideration and consumption during these occasions. Using diverse consumer recruits from across Australia and NOW WHAT's multi-platform journaling tool, this research examines consumers' unique values and relationship with fruit and vegetables by identifying drivers and barriers for consumption during these six occasions, also called demand spaces. The six demand spaces analysed were:

1. Breakfast at or from home
2. Breakfast/brunch out of home
3. Lunch at school/work
4. Afternoon snack
5. Dinner at home
6. Post-dinner snack/dessert

This study finds fruit and vegetables playing important, yet distinct roles in the Australian diet. Australian consumers tend to look at their food decisions using a holistic lens: they look at the aggregate of each day's or week's meals to ensure an overall balance of health, nutrients, and flavours. When it comes to health, many consumers alternate between "healthy" and "indulgent" meals or days, finding it possible to have both and still maintain a healthy diet. This often plays out through a split between weekday and weekend consumption, with weekdays being more about 'healthy' choices, while the weekend is for more indulgent decisions.

As seen in other global markets explored in this research series, Australian consumers have clear expectations of when and why fruit and vegetables should be used, assigning each to specific eating occasions, while excluding them from the consideration set for other occasions. In order to increase produce usage and consumption in the six demand spaces examined, consumers must be shown how fruit and vegetables can deliver on their stated needs in each occasion.

“While fruits are noted as providing more specific nutrients or vitamins, vegetables are viewed as more of a healthy “catch-all,” and a “good-for-you” option, rather than providing specific health benefits or properties.”

## Key Themes

Fruits and vegetables’ perceived health benefits make them key components in the diets of our audience who rely on them to balance out their more indulgent or guilt-inducing food choices. Even consumers who often eat meat will opt for vegetarian meals (e.g., smoothies, bowls, avocado toast), to balance out their meat-centric and less healthy choices. However, while fruits are noted as providing more specific nutrients or vitamins, vegetables are viewed as more of a healthy “catch-all,” and a “good-for-you” option, rather than providing specific health benefits or properties.

When shopping for produce, consumers often keep price in mind. In addition to seeking out fruits and vegetables that are in season to ensure quality and freshness — consumers will also look for what is on sale or least expensive, basing their purchase decisions on price and quality rather than on the type of produce.

Although some more expensive produce options are often ignored in favour of more economic choices, consumers do make exceptions on certain occasions. Whether it be preparing a recipe for a special occasion or purchasing their favourite tropical fruit (e.g., watermelons, figs, pineapple), consumers will make some decisions based on pleasure over price.

### DEMAND SPACES AND DRIVERS

Australian consumers look for opportunities to surprise and delight their palates when and where they can. Many consumers enjoy finding and trying new recipes, especially for special occasions, or on the weekend when they have more time. These opportunities to experiment also allow them to try different types of produce beyond their “go-to” options. Rather than eating for strictly functional purposes, consumers see these as occasions of adventure and excitement, and as an escape from their more mundane and ordinary eating routines.

Consumers tend to see fruits as the more convenient, less prep intensive produce option because they are more frequently consumed raw and with little need for cutting and washing beforehand. However, vegetables like carrots that are easily consumable raw and require little time for preparation are also considered convenient. These low prep, raw foods are the preferred produce options for meals on-the-go and snacks.

### BREAKFAST AT OR FROM HOME

Our audience does not usually have a lot of time in the morning and some may skip breakfast. Those who do eat breakfast are looking for food that is nutritious, energising and convenient. They want it to be enjoyable as well as filling, so they are not distracted by hunger before lunch. If they choose to cook something it must be something they can do quickly. If they are taking breakfast on-the-go, it must be something portable and not messy.

“Our audience views this meal [Breakfast/Brunch out of Home] as a small celebration and as a reward they’ve earned for making it through the week. They often eat more indulgent food items, at a more leisurely pace, without the stress of preparing or cleaning up after the meal.”

Our audience considers fruit a great food item for this occasion since it is sweet, healthy, and convenient to eat. Fruit is also versatile in that it can also easily be mixed with grain cereals and/or consumed in juice form. Although vegetables aren’t as prevalent at this occasion because they require more time to prepare, they are sometimes eaten on top of toast, mixed in with eggs, or incorporated into smoothies.

#### **Breakfast at or from Home is characterised by**

- Minimal prep
- Minimal clean up
- Portable (if on-the-go)
- Filling
- Relatively healthy

#### **BREAKFAST/BRUNCH OUT OF HOME**

Often happening on the weekend, brunch at a café or restaurant is a time to enjoy relaxing with friends and family. Our audience views this meal as a small celebration and as a reward they’ve earned for making it through the week. They often eat more indulgent food items, at a more leisurely pace, without the stress of preparing or cleaning up after the meal.

Healthy is less of a priority during this occasion as consumers are looking to treat themselves and enjoy everything in the moment. Here, our audience wants food that are tasty and fulfilling, rich in flavour, more aesthetically pleasing and more adventurous or complicated than what they can make at home.

Fruits’ sweetness and colourful nature easily aligns with brunch’s reputation as a more indulgent occasion. It is often featured along with main dishes, as juices, or on its own (e.g. acai bowls). Vegetables are featured in savoury dishes during brunch occasions, as sides or part of a main dish, or in smoothies. At this occasion, vegetables, like fruit, are consumed for their vibrancy and taste rather than health benefits.

#### **Breakfast/Brunch out of Home is characterised by:**

- Sit-down
- Filling
- Satisfying
- Mix of savoury + sweet
- Social occasion
- Indulgent
- Sharable
- Non-simple recipes

#### **LUNCH AT WORK/SCHOOL**

Our audience looks forward to this meal as a chance to recharge for the second half of their workday. Because they have a limited amount of time to eat, they are looking for a quick, convenient, healthy meal so they can get back

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to work feeling refreshed and energised. But while their food must be filling and nourishing, they do not want anything that is too heavy or can leave them feeling lethargic.

Salads and sandwiches take center stage during this occasion, as they are quick and healthy options. Vegetables' savoury nature and versatility make them perfect for consumption at this occasion, but fruits are featured less in this occasion, as consumers tend to see them as snack items. However, when fruits are selected at this time, it tends to be in the form of juice or as whole fruit.

**Lunch at work/school is characterised by:**

- Leftovers or something brought from home
- Convenient
- Nutritional
- Simple
- Occasionally purchased outside

**AFTERNOON SNACK**

Australian consumers look forward to this mid-afternoon occasion because it is an opportunity to take a short break from work and quickly replenish their energy, allowing them to maintain focus for the rest of the day. They are looking for a quick, convenient, healthy snack, that requires little to no preparation.

Our audience considers fruit a great choice during this occasion because it's a convenient option with a refreshing, sweet taste that provides a healthy boost as they head into the end of the workday. With a milder flavour profile and requiring more time to prepare, vegetables are less sought after as an afternoon snack, however, some consumers do find crunchy vegetables to be satisfying at this occasion.

**Afternoon Snack is characterised by**

- Quick
- Convenient
- Cold
- Easy clean up
- Single Item

**DINNER AT HOME**

As seen in other global markets explored in this series, Australian consumers look forward to dinner at home and enjoy sharing it with friends and family. This occasion is viewed as an opportunity to start relaxing, unwinding and catching up with family. At this point in the day our audience is hungry but doesn't have a lot of energy. They are looking for a meal that is easy to prepare, relatively healthy, filling, satisfying and will replenish their energy. They also want this meal to be balanced, so they try to ensure protein, starch, and vegetables are all present.

“As one of their most enjoyable eating occasions [Post-dinner Snack/Dessert], they often crave a small, sweet, indulgent treat. Looking to end the night on a sweet note, fruit is a great choice for Australian consumers as they love its sweet taste and healthy nature.”

Vegetables’ healthy nature and versatility in both flavour and preparation style make them great options for dinner at home. Australian consumers eat them raw, as side dishes, or mixed into larger dish. Fruits’ sweeter taste reduces their ability to play in the dinner space, as this meal tends to be considered more of a savoury occasion.

#### **Dinner at Home is characterised by**

- Prepared at home
- Balanced (flavours and nutrients)
- Filling
- Relaxing
- Hot

#### **POST-DINNER SNACK/DESSERT**

Whether alone, or with friends or family, our audience looks to this occasion as an opportunity to relax after a long day. As one of their most enjoyable eating occasions, they often crave a small, sweet, indulgent treat. Looking to end the night on a sweet note, fruit is a great choice for Australian consumers as they love its sweet taste and healthy nature. It gives a guilt-free and sweet ending to the night. Having likely been consumed at dinner and generally lacking a sweet taste, vegetables are less appealing to consumers as an option for an end of the night snack.

#### **Post-dinner Snack is characterised by**

- Indulgent
- A single item
- Relaxing
- Convenient
- Sweet

### **Barriers**

During the week, when time is scarce, consumers will default to tried and true recipes and food options, choosing meals and snacks they can count on as being satisfying and satiating. Many have a “go-to” list of mental recipes they fall back on, thus limiting the diversity of produce consumed during the week.

While most consumers include fruits and vegetables in their ideal versions of meals and snacks, they often end up foregoing these idealised versions due to time and energy constraints. Produce, especially items that require preparation and cooking, is often substituted for quicker, easier, less time-intensive options as a result of these constraints.

“Consumers consider vegetables to be time- and labor-intensive to prepare and they struggle to see them as being suitable as snacks, which results in vegetables often being considered only for meals that are less hurried.”

## Expanding Produce Consumption

While different flavour profiles and preparation styles exist with both fruits and vegetables, consumers tend to pigeonhole the eating occasions at which each can be present. Like consumers in other global markets studied for this research series, Australian consumers tend to associate fruits and vegetables with specific flavour profiles (sweet and savoury, respectively). Seeing breakfast, snacks and dessert as sweet occasions means fruit is often in the consideration set at these times, while other meals are viewed as more savoury, so vegetables are considered more suitable for these occasions.

Beyond their taste, consumers also often forego fruit at some occasions due to a fear of getting too messy. Additionally, consumers consider vegetables to be time- and labor-intensive to prepare and they struggle to see them as being suitable as snacks, which results in vegetables often being considered only for meals that are less hurried.

But with their eye-catching colours, natural sweetness and visceral sensations of crunch and juiciness, produce can break through current limiting perceptions and uses to offer consumers dynamic, unexpected and personally relevant choices. To expand produce usage and consumption in the six demand spaces examined, produce marketers must show Australian consumers how fruits and vegetables can meet their needs for each eating occasion. Use the motivations, drivers and barriers identified in this study to share and spark ideas for innovation.