

**Hort  
Innovation**  
Strategic levy investment

**PAPAYA  
FUND**

**Research**



## Consumer Research Driving Growth for Papaya

### Debrief

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An up-to-date understanding of the papaya consumer landscape to **identify key targets and growth opportunities** and develop an **insight driven strategy** for future marketing

## TARGET INSIGHT



*Who should the core target be?*

*Why do they/don't they consume papayas and how do we unlock growth opportunities?*

## SIZING THE OPPORTUNITY



*How big is each growth opportunity?*

*How do we prioritise the opportunities which offer the greatest value?*

## MARKETING STRATEGY



*What are the big strategic and category drivers we should focus on to unlock growth and how do we unlock these?*





- Project incorporated a kick off workshop, in store consumer intercepts and questionnaire input from stakeholders
- In field April 2018

## METHODOLOGY

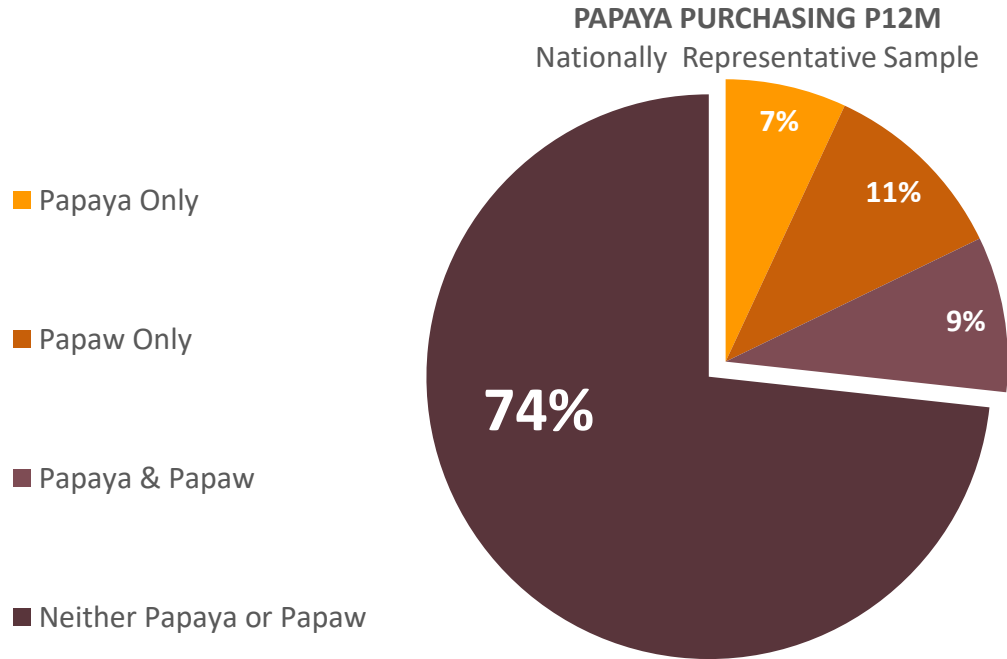
- 10 minute online survey
- Three key questionnaire sections:
  - Understanding a **recent purchase event**
  - Understanding **attitudes and barriers** towards the category
  - Evaluating **new opportunities** for papaya

## SAMPLE

- Sample: **N=314**
  - Papaya buyers: **N=210**
  - Papaya Non-buyers: **N=104**
- The invites were sent out to a robust nationally representative group of 18-70 year old's who were main grocery buyers
- Those who had purchased fresh papaya in the past 12 months were classified as buyers

# A Quarter of Australians are Currently Buying into The Category Yet Majority of the Population haven't bought Papaya or Papaw within the Last Year

TOTAL CATEGORY



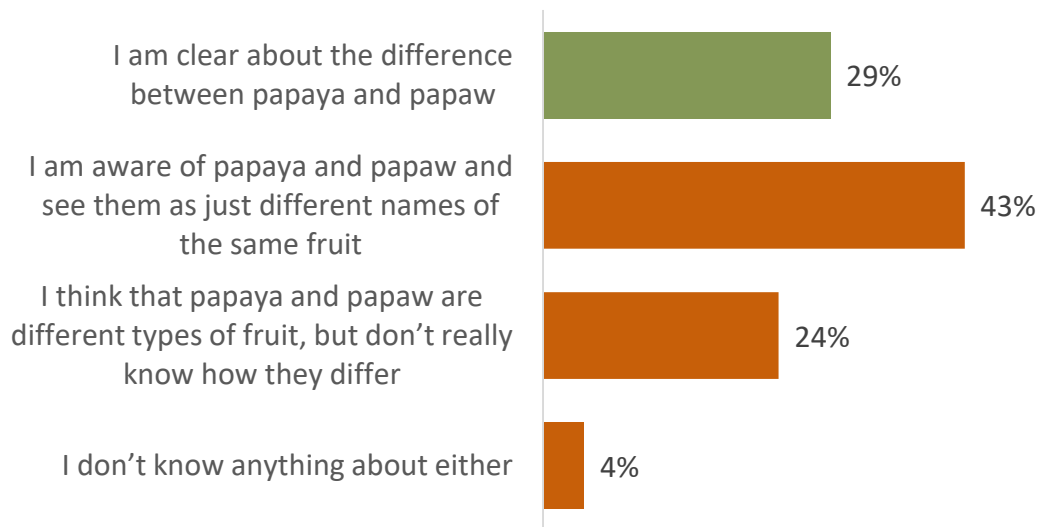
UNIQUE USAGE OF PAPAW SLIGHTLY MORE PREVALENT THAN PAPAYA OVERALL

# Huge Opportunity Exists to Increase Understanding

## Significantly More People are Unclear vs. Clear on the Difference between Papaya and Papaw

### Differentiating Papaya and Papaw – Total Sample

#### DIFFERENTIATING PAPAYA AND PAPA



	FORTNIGHTLY PURCHASERS N=79	MONTHLY PURCHASERS N=56	INFREQUENT PURCHASERS N=75	NON PURCHASERS N=104
I am clear about the difference between papaya and papaw	47%	38%	26%	15%
I am aware of papaya and papaw and see them as just different names of the same fruit	39%	45%	50%	39%
I think that papaya and papaw are different types of fruit, but don't really know how they differ	14%	17%	23%	35%
I don't know anything about either	0%	0%	0%	12%

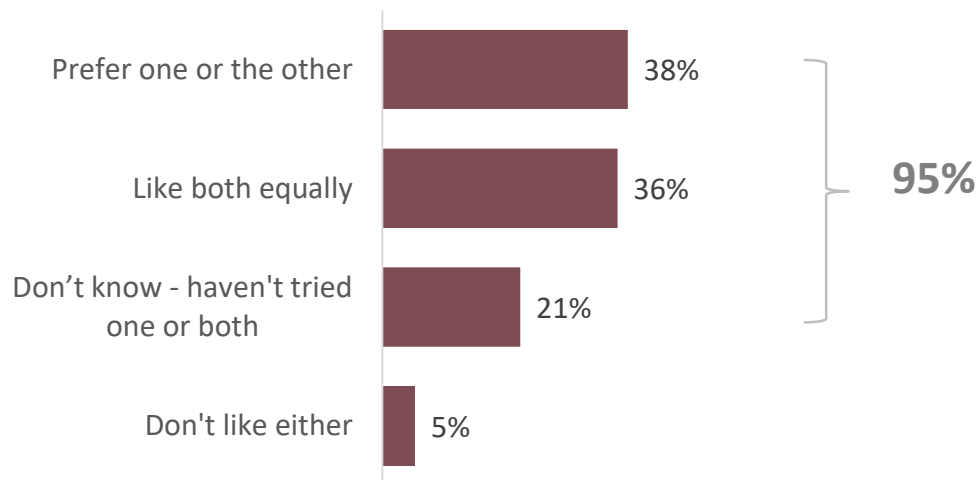
THERE IS A JOB TO CLEARLY DELINEATE 'PAPAYA' FROM 'PAPAW'

TOTAL CATEGORY

# 95%

OF OUR SAMPLE  
ARE OPEN TO  
CONSUMING EITHER  
PAPAYA OR PAPA

### PREFERENCE FOR PAPAYA OR PAPA Amongst total sample



WE NEED TO CONSIDER HOW WE BEST (COST EFFECTIVELY) DRIVE TRIAL GIVEN THE LACK OF AWARENESS

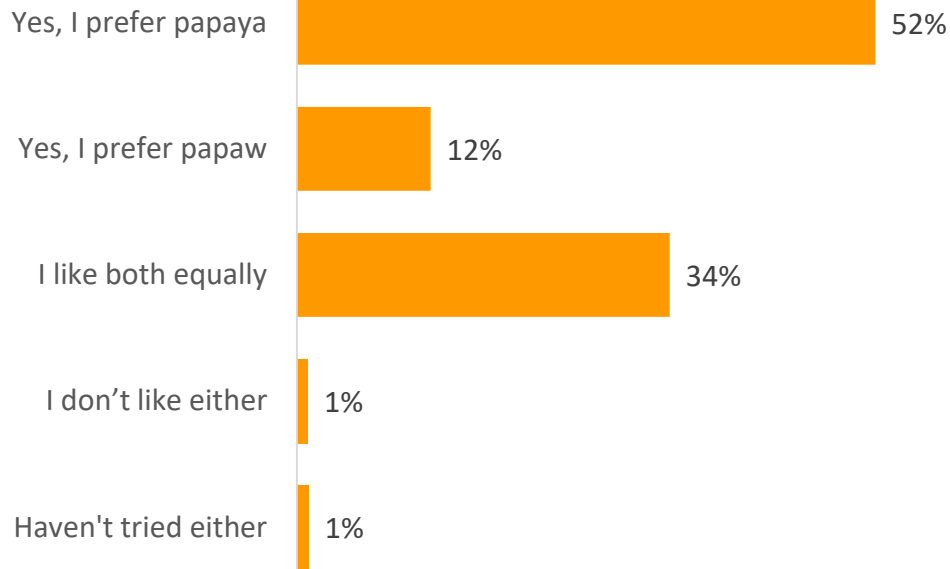
# Those who are Clear on the Differences between the Fruits have a Preference for Papaya over Papaw

TOTAL CATEGORY

86%

OF CONSUMERS  
EITHER PREFER PAPAYA  
OR HAVE NO PREFERENCE  
BETWEEN PAPAYA AND PAPA

## PREFERENCE FOR PAPAYA OR PAPA Amongst those clear on the difference



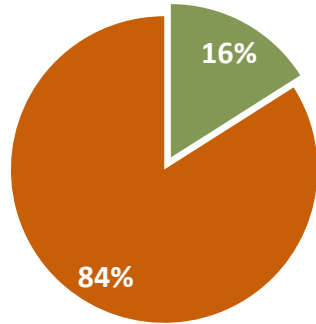
CLEARLY COMMUNICATING THE CORE BENEFITS AND DIFFERENTIATORS OF THE DISTINCT FRUITS WOULD AID UNDERSTANDING  
(HOWEVER IT ALSO FRAGMENTS OUR MESSAGING)

# Delving Specifically into Papaya ... Frequent Purchasers Account for 79% of Volume, Opportunity Is To Get Occasional Purchasers to Buy More Often & New Users to Try

## Papaya Purchasing & Frequency

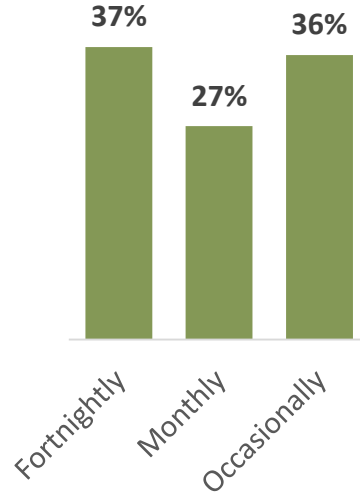
PAPAAYA

### PAPAAYA PURCHASING: PAST 12 MONTHS

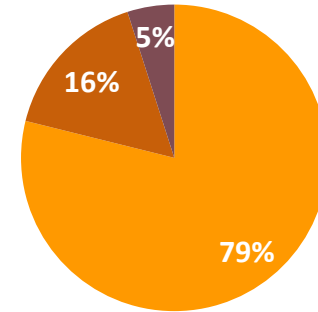


■ Papaya Purchaser ■ Non Purchaser

### PURCHASE FREQUENCY



### SHARE OF PAPAAYA VOLUME



■ Fortnightly ■ Monthly ■ Occasional

**WE CURRENTLY HAVE SOME REAL PAPAAYA LOYALISTS**

SOURCE: S9, A1. BASE: NAT REP SCREENER N=147, ALL PURCHASERS N=210

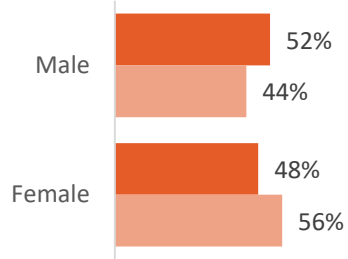
# Those who Buy Papaya are more likely to have Kids, some Asian Heritage and live in Metropolitan areas – often in NSW

## Profiling Papaya Purchasers – Total Sample

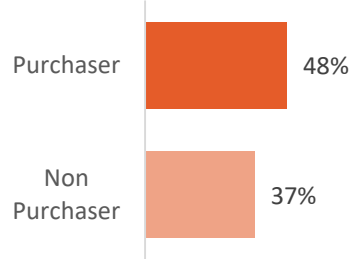
■ Purchasers  
■ Non Purchasers



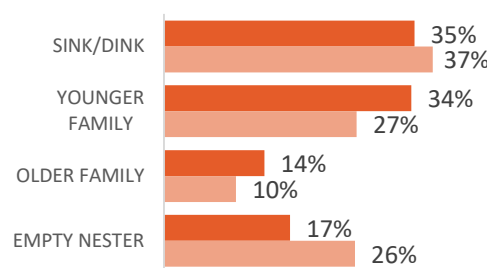
### GENDER



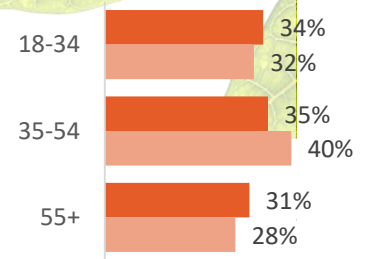
### CHILDREN AT HOME



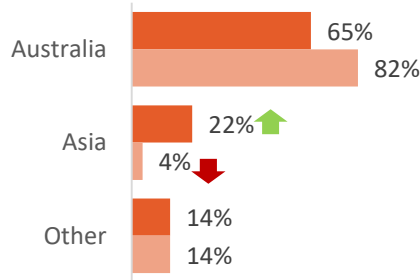
### LIFESTAGE



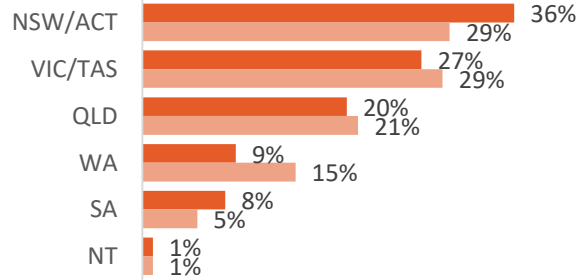
### AGE



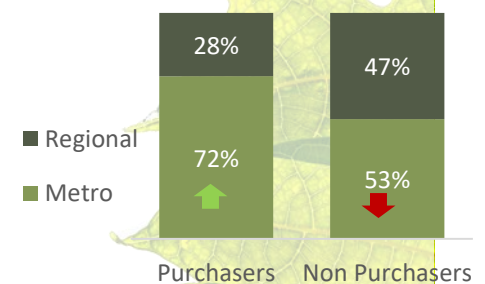
### COUNTRY OF BIRTH



### STATE



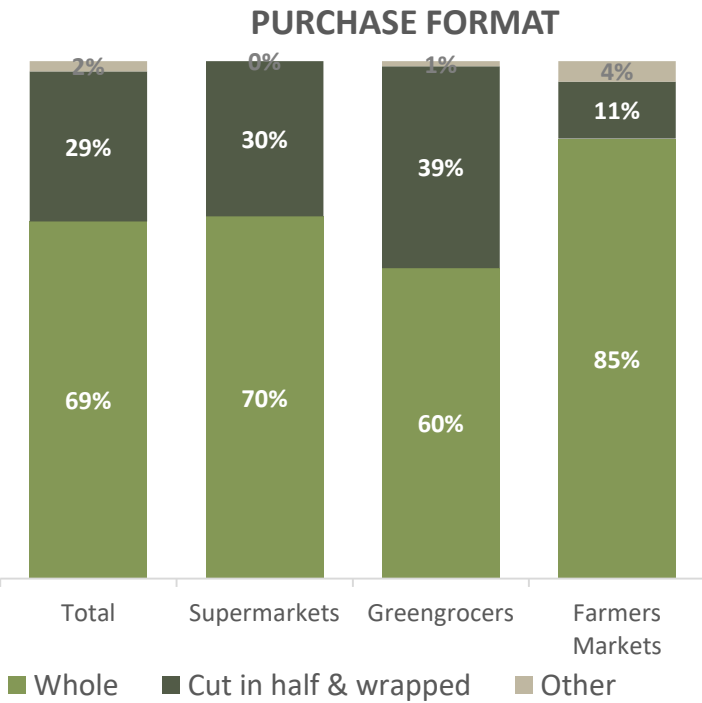
### LOCATION



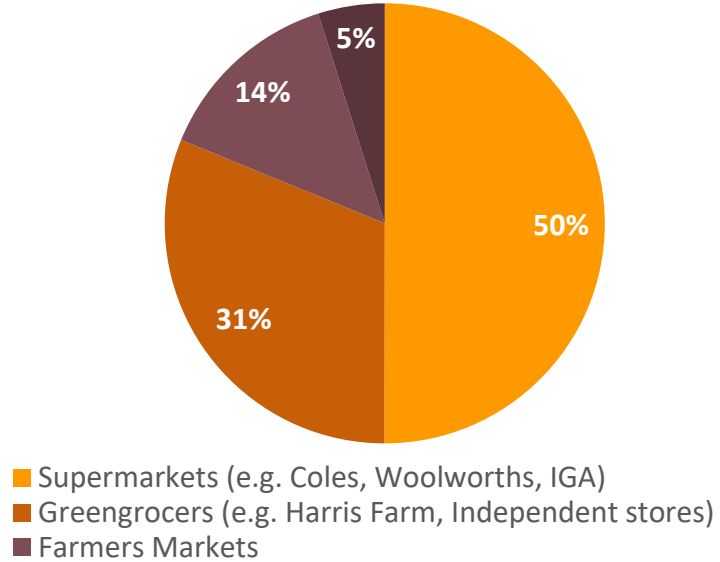
SOURCE: S2, S3, S4, S6, D4. BASE: ALL RESPONDENTS N=314

# Majority of Papaya is purchased Whole and in Supermarkets

Purchase location & format – Total Sample



### MOST RECENT PURCHASE LOCATION

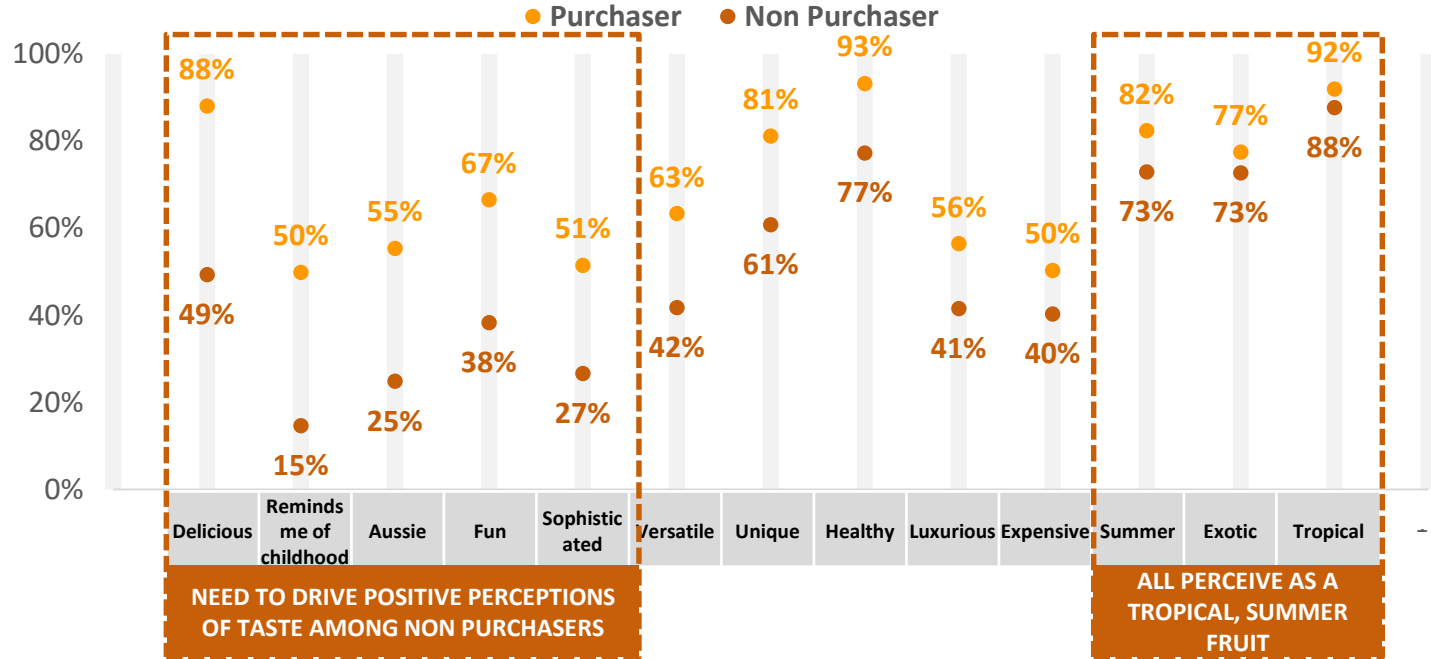


SOURCE: A2, A4. BASE: PAPAYA PURCHASERS N=210

# 'Healthy', 'Tropical' & 'Delicious' are Primary Associations among Purchasers

Papaya associations – Total Sample

PAPAYA



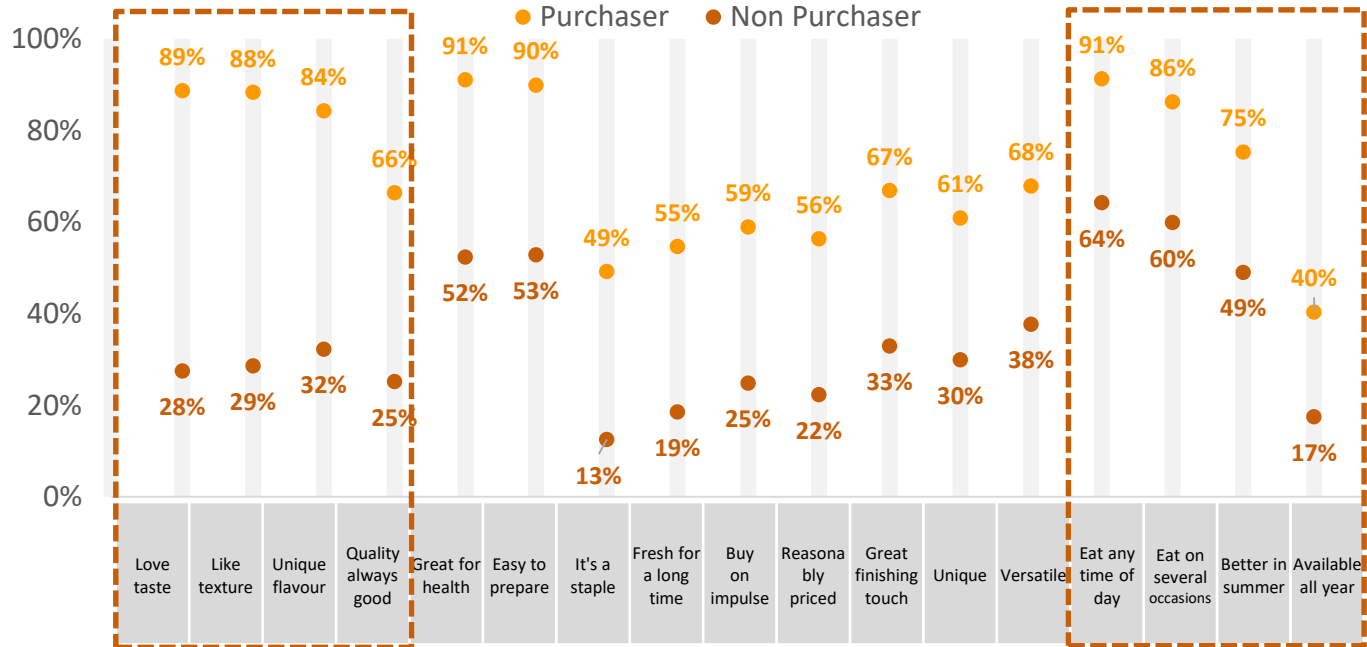
SOURCE: B2. BASE: ALL RESPONDENTS N=314

# Purchasers see many Positives However Non purchasers make Few Associations

## Huge Perceptual Gaps around Taste, Texture, Flavour

PAPAYA

Attitude to papayas – Total Sample



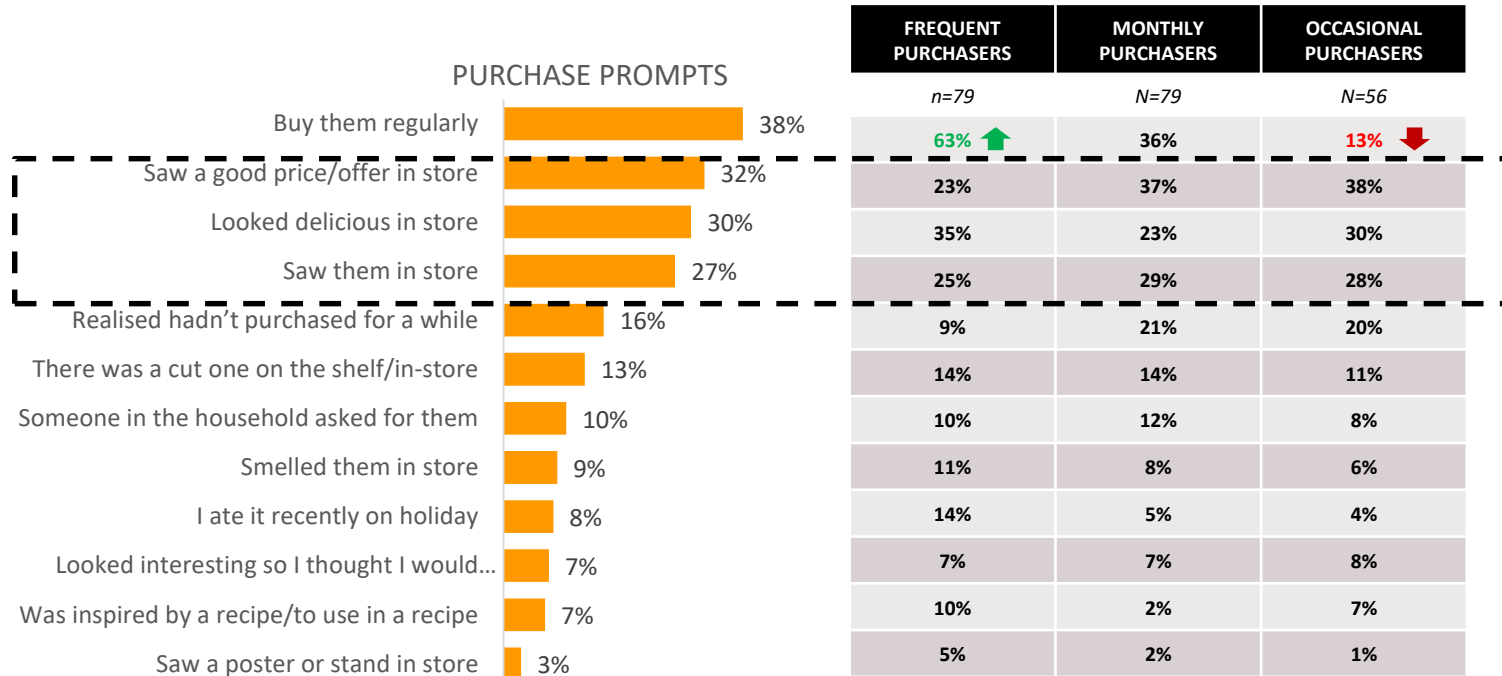
SOURCE: B2. BASE: ALL RESPONDENTS N=314

# Even Frequent Purchasers Need to be Reminded to Purchase

## Purchase Prompts – Papaya Purchasers



### IN-STORE SALIENCY WOULD CREATE THE PROMPTS THAT LEAD TO PURCHASE



SOURCE: A6, A8. BASE: PAPAYA PURCHASERS N=210

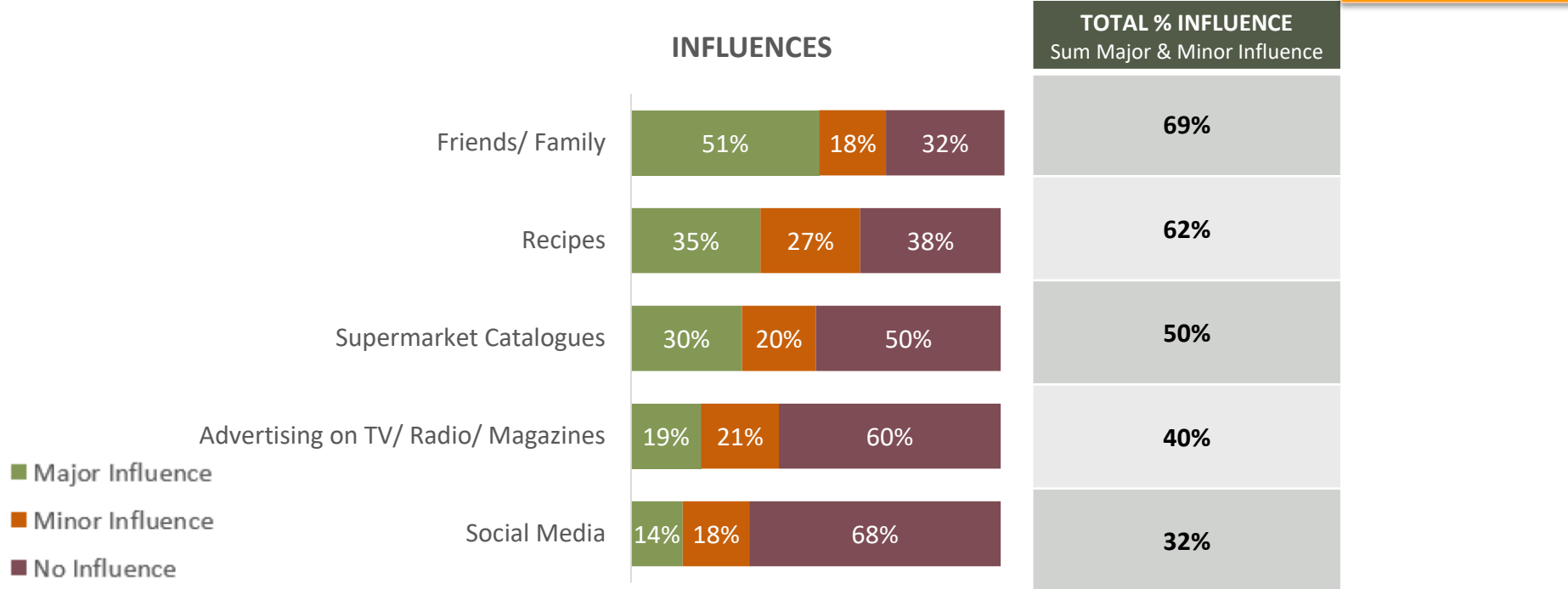
↑ = Significantly higher

↓ = Significantly lower

# Recommendations from Friends or Family are Most Influential

## Recipes also have a Significant Role to play

Influences When Buying Papaya – Purchasers who didn't buy on impulse



■ Major Influence  
 ■ Minor Influence  
 ■ No Influence

**FRIENDS/FAMILY MAY ALSO DRIVE INFLUENCE THROUGH SOCIAL CHANNELS THAT AREN'T SINGULARLY INFLUENTIAL**

SOURCE: ASA, BASE: PAPAYA PURCHASERS WHO WERE INFLUENCED BEFORE GOING IN STORE N=98 . GREEN = MAJOR INFLUENCE/ ORANGE = MINOR INFLUENCE & PURPLE = NO INFLUENCE

# Majority of Usage is Enjoying Papaya in its Pure Form

## Opportunity to Broaden Usage Occasions amongst Purchasers also Exists

### Papaya Occasions – Papaya Purchasers

**PAPAYA**

#### PAPAYA OCCASIONS



	FREQUENT PURCHASERS <i>n=79</i>	MONTHLY PURCHASERS <i>N=79</i>	OCCASSIONAL PURCHASERS <i>N=56</i>
To eat on its own	65%	62%	63%
To use in a fruit salad or with other types of fruit	11%	13%	19%
To use as an ingredient in a salad	2%	7%	11%
To use in a granita/frappe/smoothie	7%	6%	3%
To use as a topping (e.g., on a pavlova)	2%	8%	1%
To use as an ingredient in cooking	5%	0%	4%
To use as an ingredient in baking	6%	3%	0%
To use as a beauty/skin treatment	3%	0%	0%

**NEW OCCASIONS / ALTERNATE USES CAN PROVIDE INSPIRATION FOR MORE REGULAR BUYERS**

SOURCE: A6, A8. BASE: PAPAYA PURCHASERS N=210

# Awareness rather than Format is the Key to Driving Growth

## No clear stand-out Packaging Ideas

Which of these ideas would increase the amount of fresh papaya you purchase?



	PURCHASERS	NON PURCHASERS
Prepared pre-packaged fresh fruit chunks	46%	47%
Frozen diced fruit	47%	40%
On-the-go snacking packs	45%	38%
Supplements for smoothies	43%	34%
Long life fresh diced fruit (e.g. tinned)	40%	35%
Purees for small children	29%	25%

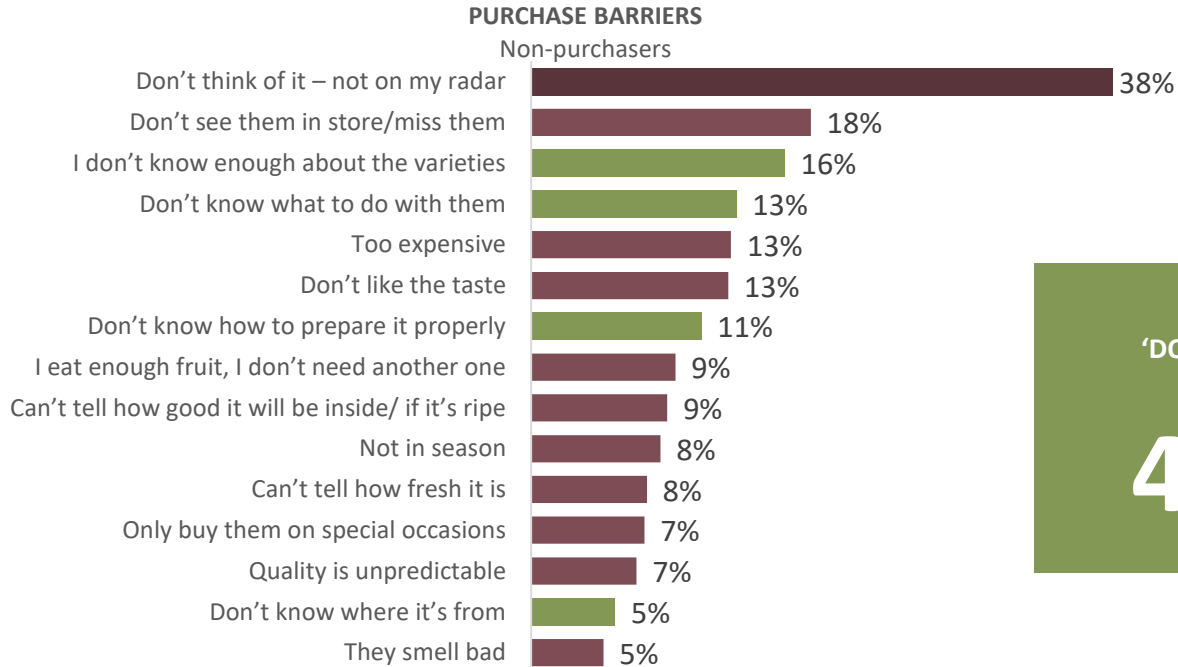
**WE NEED TO FOCUS ON DRIVING THE CATEGORY BEFORE WE INNOVATE**

SOURCE: C2. BASE: ALL RESPONDENTS N=314

# Lack of Knowledge and Top of Mind Awareness are Core Barriers for Non-Purchasers



## Barriers to Purchase – Non Purchasers



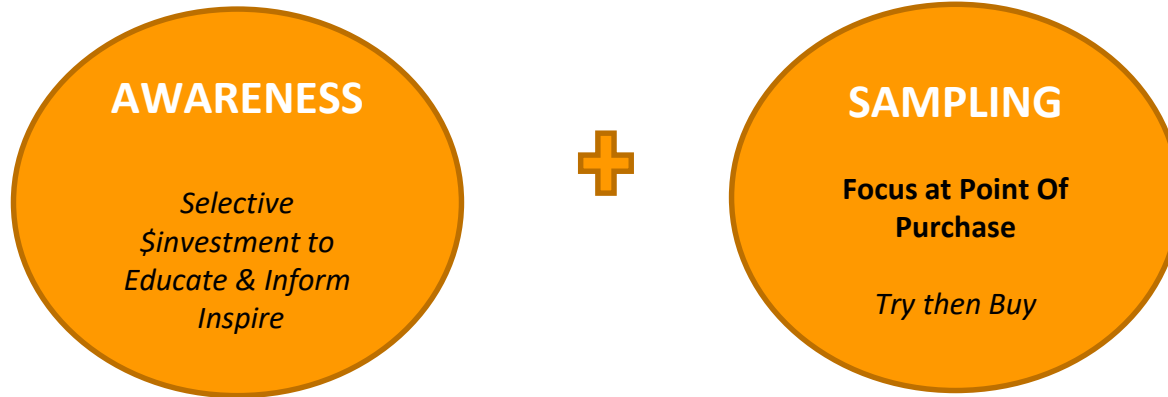
TOTAL  
'DON'T KNOW'  
**45%**

**TO RECRUIT NON-PURCHASERS, WE NEED TO BUILD AWARENESS OF THE FRUIT & DRIVERS OF APPEAL**

SOURCE: B3. BASE: ALL RESPONDENTS N=314

# Key Take Outs : Penetration is Key Priority

**Getting Papaya Top Of Mind amongst Australians**  
**Know it ... Taste It ... Love It !!**



# Thank you

