

**Hort  
Innovation**  
Strategic levy investment

 **edentify**

**BANANA  
FUND**

BANANA CONSUMER TRACKING  
APR/JUN 20



## Research objectives

- **Measure overall attitudes towards bananas**; tracking awareness, quality and taste expectations, perception statements and the health benefits that influence consumer behaviour.
- **Track advertising effectiveness.** Ad recall and impact on purchase behaviour.
- **Establish purchase drivers and identify purchase barriers** to help guide future marketing and communication initiatives.
- **Identify shifts in consumption habits and occasions**



## Methodology and Sample:

### Methodology

On-going tracking study.

Online quantitative survey using Caféstudy, Edentify's proprietary research panel.

### Sample

- n=600 (n=300 per wave)
- Grocery Buyers
- Age 18+
- Australia-wide

### Fieldwork timings

April 19 wave: 1<sup>st</sup> – 3<sup>rd</sup> April 2019  
June 19 wave: 22<sup>nd</sup> – 26<sup>th</sup> May 2019

Aug 19 wave: 11<sup>th</sup> - 16<sup>th</sup> September 2019  
Oct 19 wave: 8<sup>th</sup> - 13<sup>th</sup> October 2019

Dec 19 wave: 10<sup>th</sup> – 14<sup>th</sup> December 2019  
Feb 20 wave: 3<sup>rd</sup> – 10<sup>th</sup> February 2020

April 20 wave: 8<sup>th</sup> - 14<sup>th</sup> April 2020  
June 20 wave: 28<sup>th</sup> May - 1<sup>st</sup> June 2020



# Agenda

## SECTION 1

**The snacking  
category**

## SECTION 2

**Purchase  
behaviour**

## SECTION 3

**Attitudes  
towards  
bananas**

## SECTION 4

**Consumption  
and usage  
habits**

## SECTION 5

**Advertising  
effectiveness**

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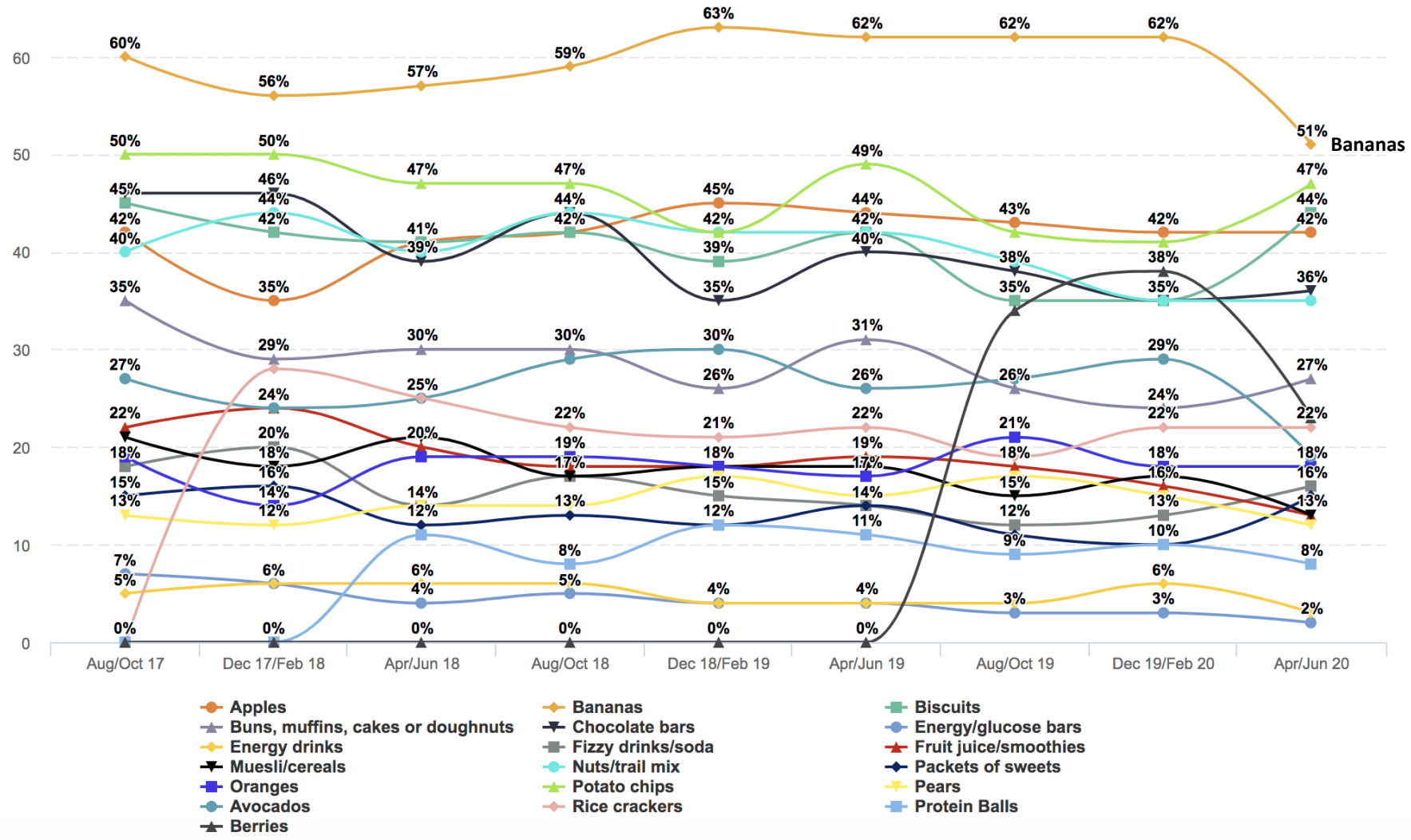
SECTION 1

## The snacking category



We can clearly see that the Covid outbreak context has affected the snacking category, with some unusual shifts.

### TOP 5 SNACKS

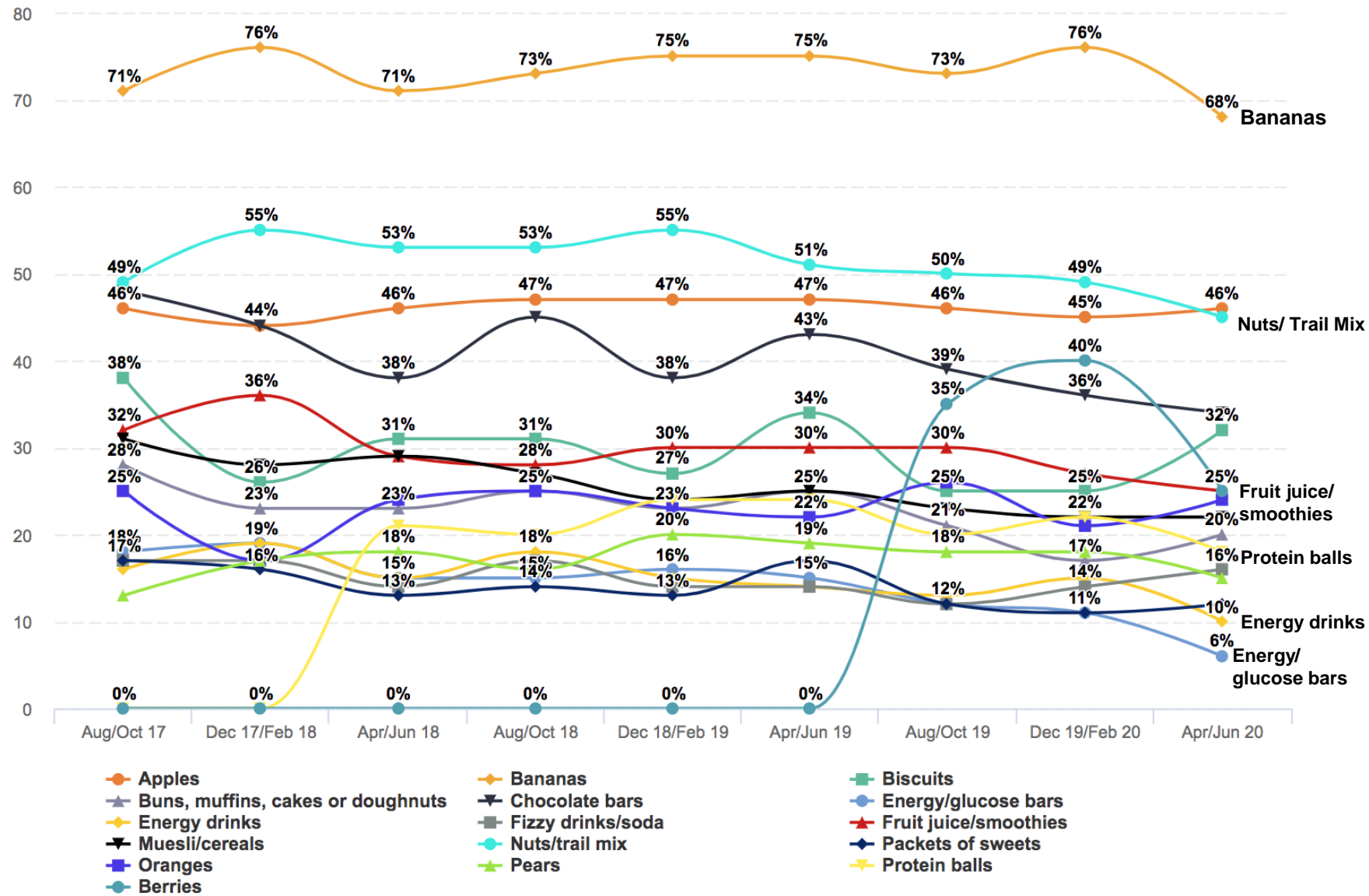


Q1. Please select your top 5 snacks from the following list. Base: Total each wave n=600

Amongst the energy snacks, the most affected are the ones directly related to energy (fitness) or outdoor activities.

Although bananas remain the clear favourite energy snack, in this period of reduced outdoor/fitness activities, Bananas are experiencing a drop from 76% to 68%.

### TOP 5 ENERGY SNACKS

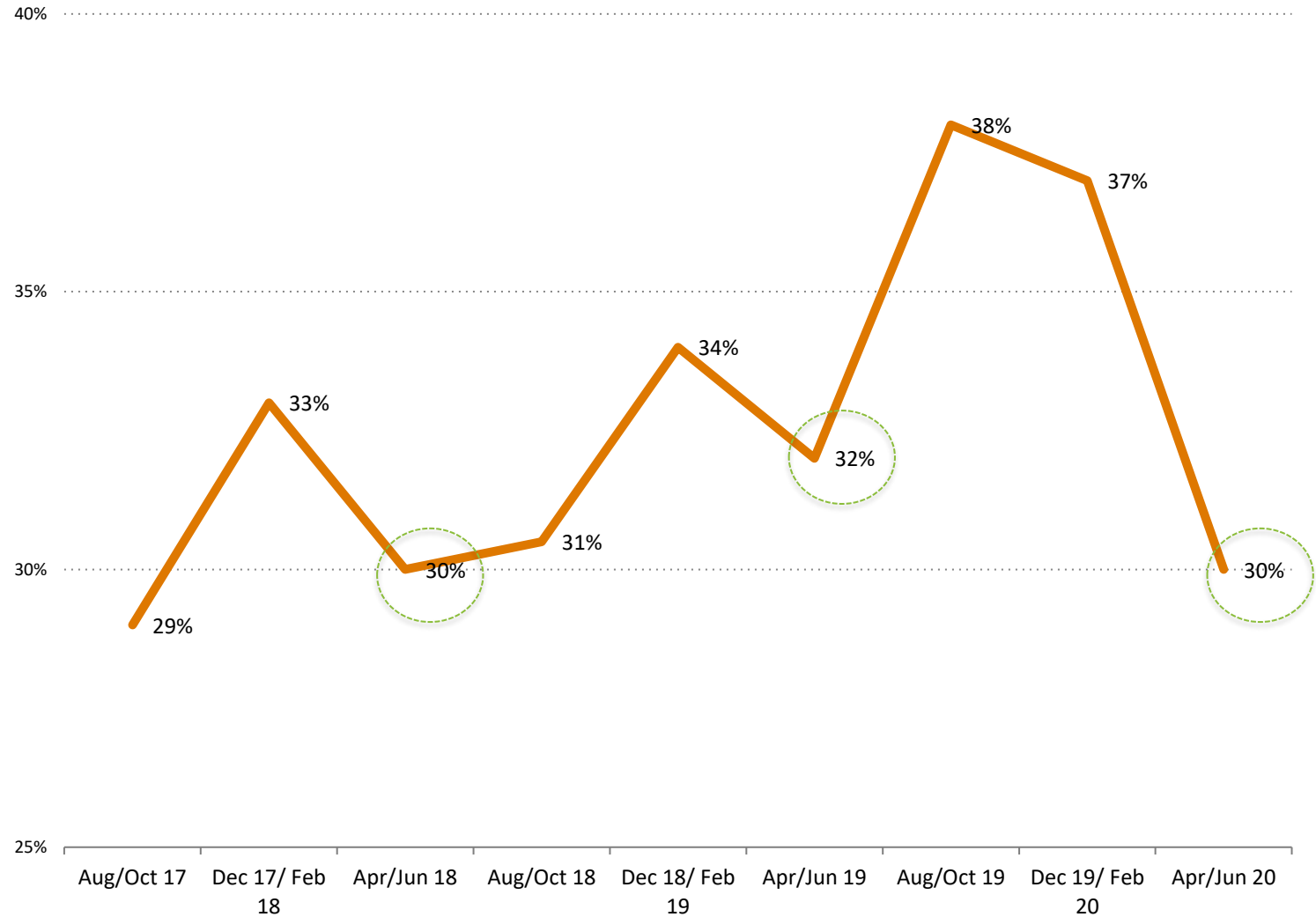


Q1a3. Please select your top 5 preferred energy snacks from the following list. Base: Total n=600 each wave

Each year at this period, Bananas are slightly dropping as the #1 favourite energy snack.

That said even in this extreme context, Bananas remains the favourite snack of almost 1 in 3 consumers.

RANK BANANA AS #1 ENERGY SNACK

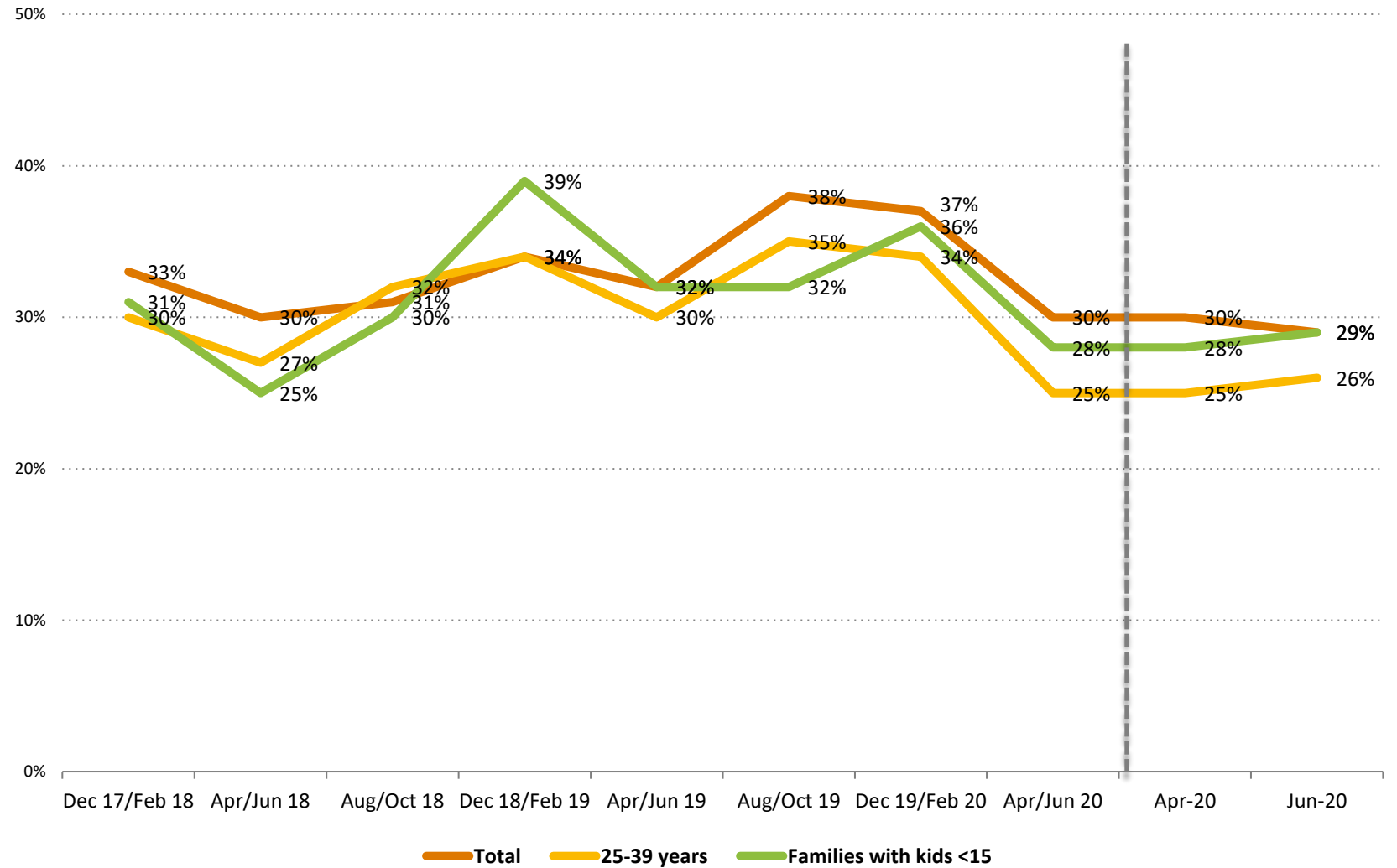


\* Significant differences wave on wave, at 95% confidence level

Q1b. Please select your top 5 preferred energy snacks from the following list. Base: Total for each wave n=600

Looking at this performance by key segment, we can already see the signs of 'recovery' in June 2020

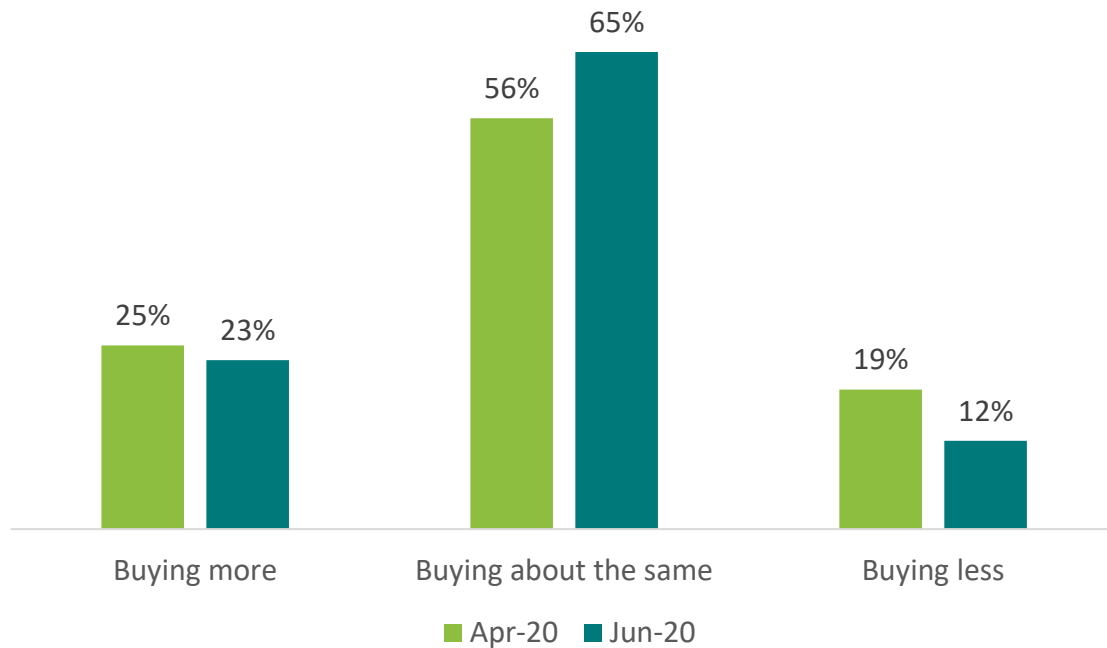
RANK BANANA AS #1 ENERGY SNACK – BY KEY AUDIENCE



Q1a. Please select your top 5 preferred energy snacks from the following list. Base: Total for each wave n=600; in Dec 19/Feb 20 25-39 years old n=173; Families with children <15 n=115

# During this Covid outbreak, people are progressively getting back to their usual fresh fruit shopping habits.

## BOUGHT MORE OR LESS FRESH FRUITS THAN BEFORE DURING THE COVID OUTBREAK



## KEY REASONS FOR BUYING MORE OR LESS

### BUYING MORE

#### More health conscious

*I feel these will strengthen my immunity.  
So I don't eat so many biscuits.*

#### Eating more often at home:

*We are constantly at home, therefore we are eating more.  
At home more, trying new cooking recipes.*

### BUYING LESS

#### Safety concerns

*Safety concerns and less grocery shopping.  
trying to only buy prepackaged fruit.  
Uncomfortable about cleanliness.*

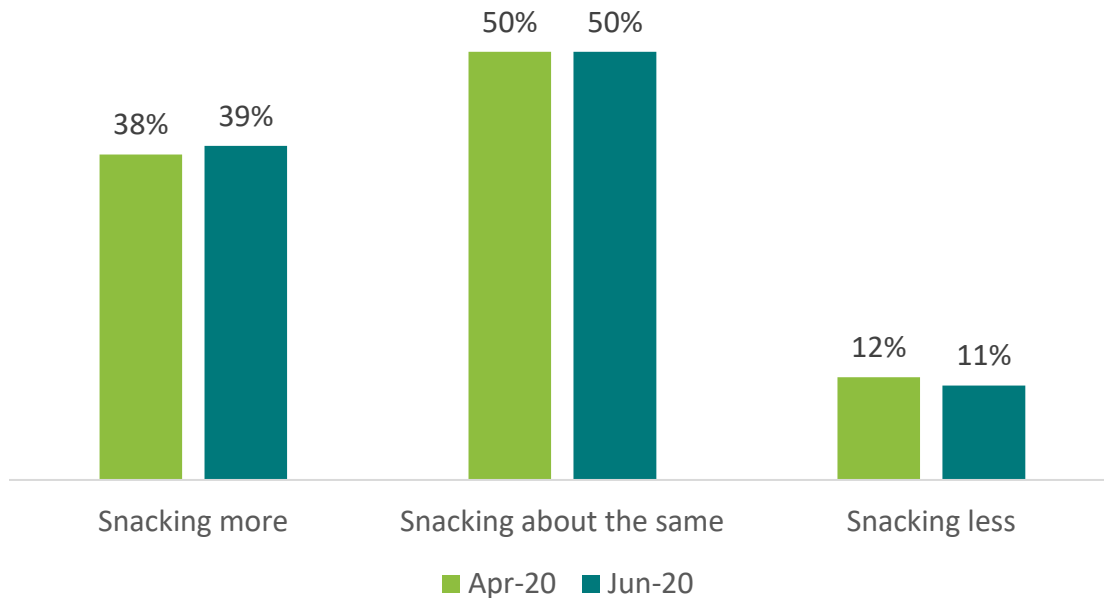
#### Financial reasons

*It seems to be more expensive.  
Unable due to finance.*

In the recent weeks, would you say that you have been buying more or less fresh fruit and vegetables than before the COVID-19 outbreak? N=300 each waves

## During this isolation period, over 1 in 3 is still snacking more than before.

### SNACKING MORE OR LESS THAN BEFORE DURING THE COVID OUTBREAK



### KEY REASONS FOR SNACKING CHANGES

#### Boredom

*Because I have less things to do, so I'm snacking more when I'm bored. There's no other work than snacking and watching Tv at the moment.*

#### Stress

*Exogenous factors. the stress, so I want to eat more snacks.*

And would you say that you have been snacking more or less than before the COVID-19 outbreak? N=300 each wave

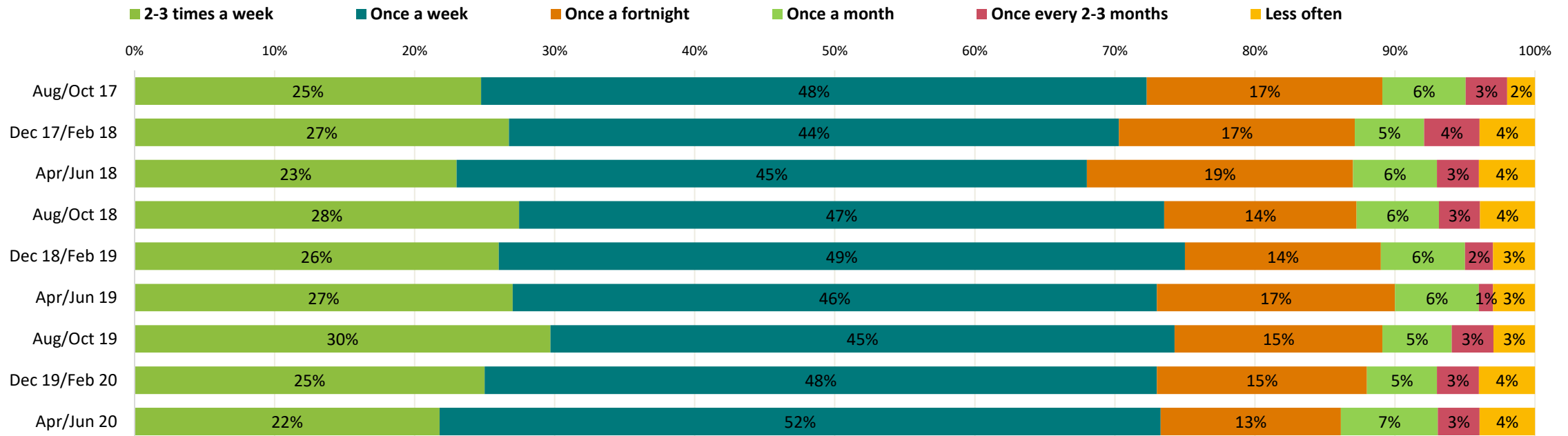


SECTION 2

## Purchase Behaviour

# A slightly proportion of shoppers have shifted from shopping several times a week to once a week.

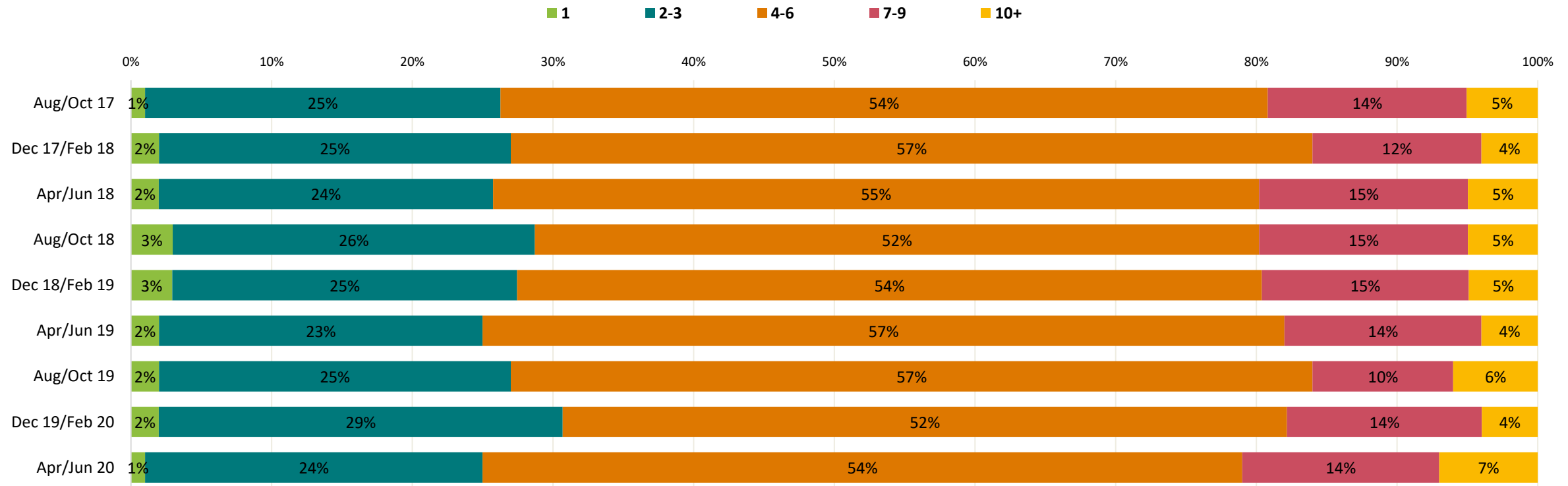
## PURCHASE FREQUENCY



Q2. Which one of the following best describes how often you buy bananas? Base: Total n=600 each wave

# Shopping less frequently, people tend to buy more bananas at a time

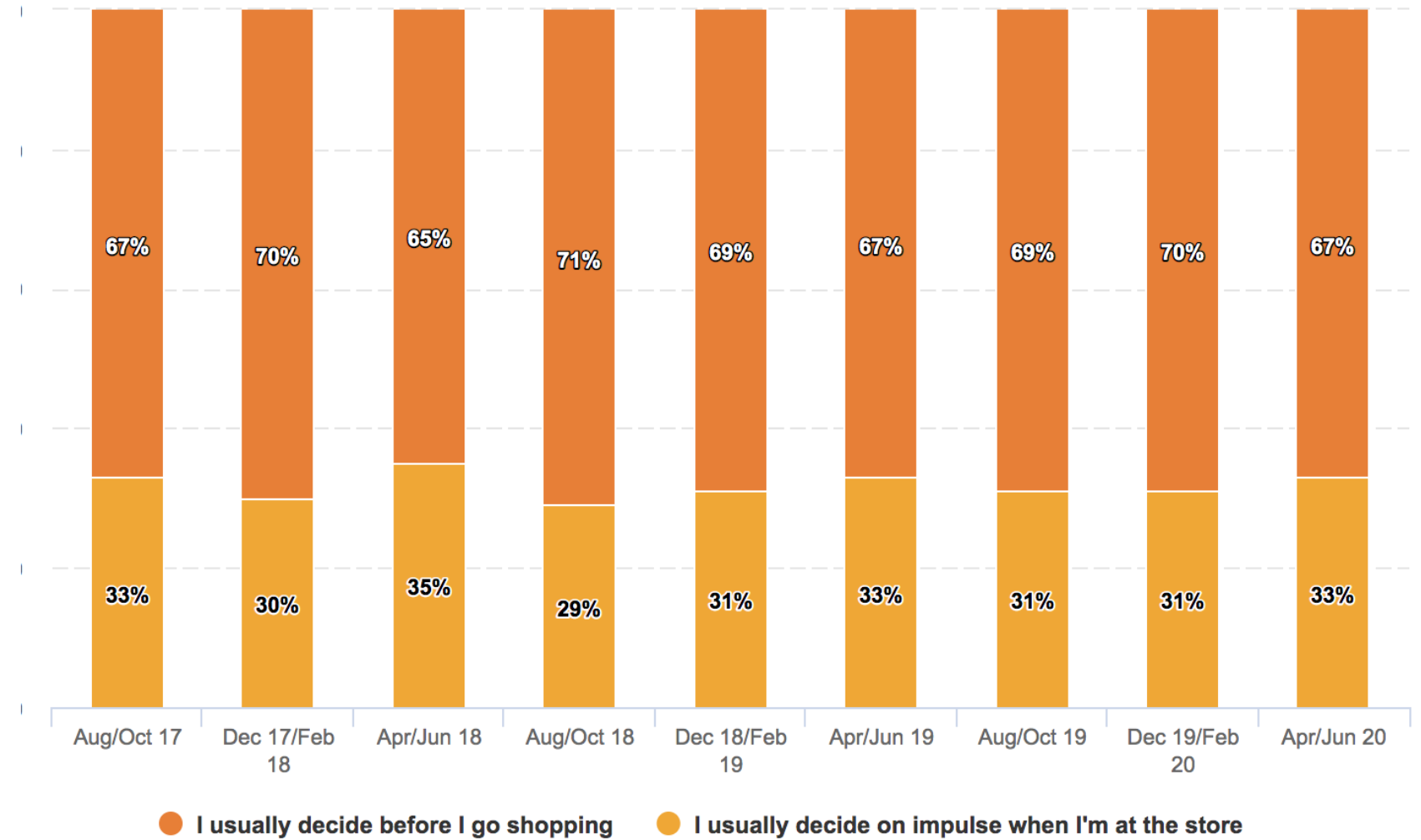
NUMBER OF BANANAS PURCHASED LAST TIME



Q2a. Thinking about the last time you purchased bananas, please indicate the number of fruit you purchased.  
Base: Total each wave n=600

## Bananas remains largely a pre-planned purchase

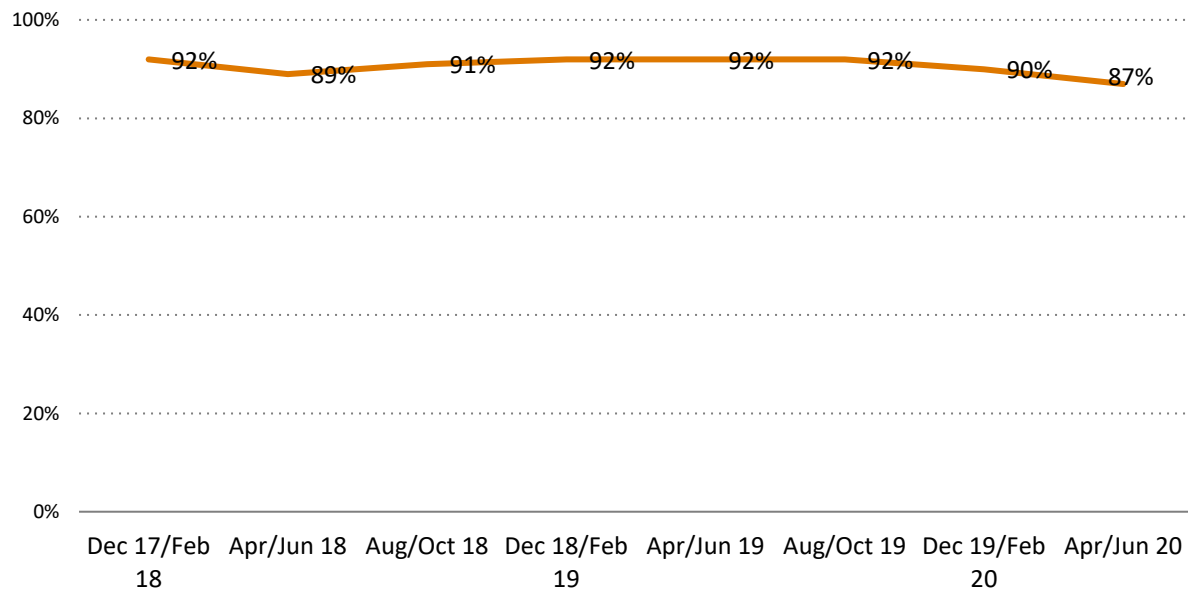
### NATURE OF PURCHASE DECISIONS



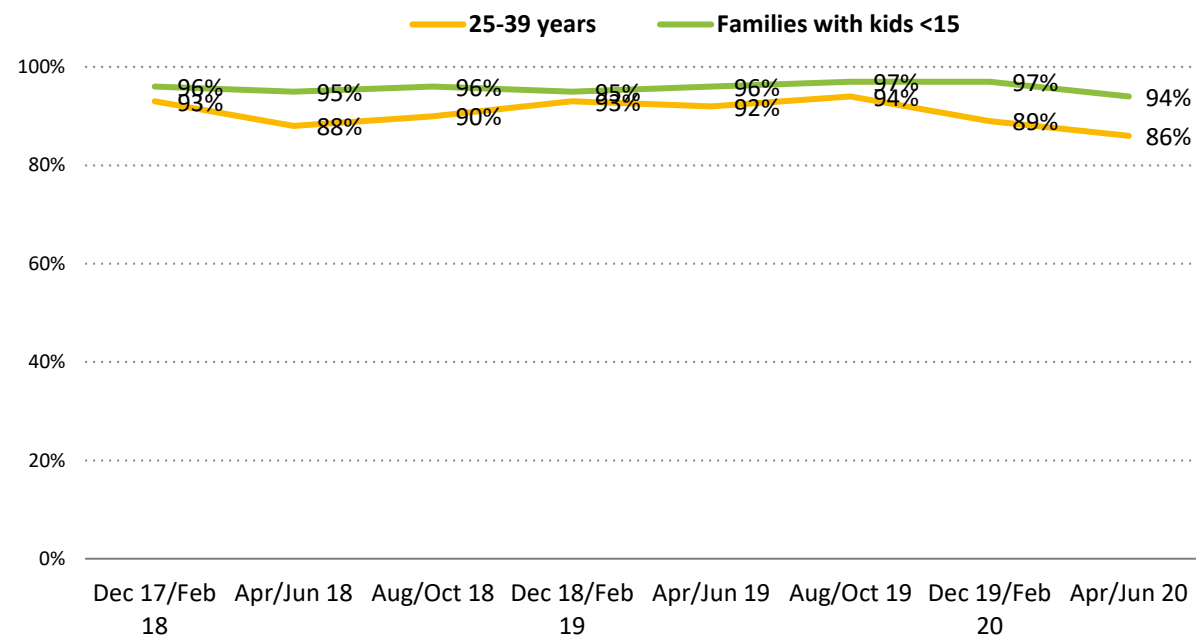
Q4. Which one of these best describes when you usually decide to buy bananas? Base: Total n=600 each wave

## Purchase intentions remain extremely high, especially amongst families with kids <15

LIKELIHOOD TO PURCHASE (VERY LIKELY/LIKELY) - TOTAL



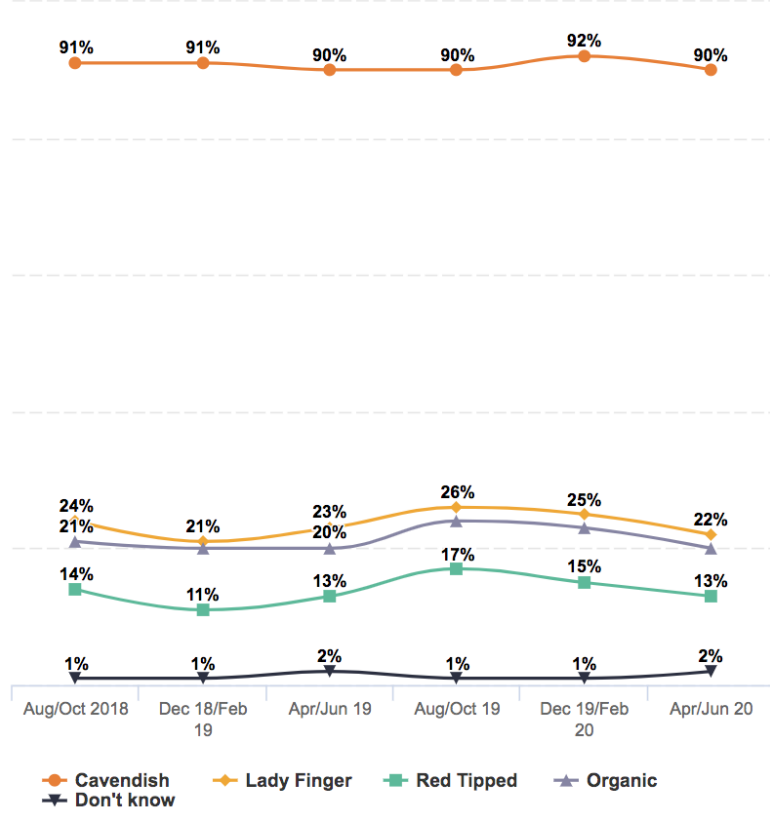
LIKELIHOOD TO PURCHASE (VERY LIKELY/LIKELY) – KEY TARGETS



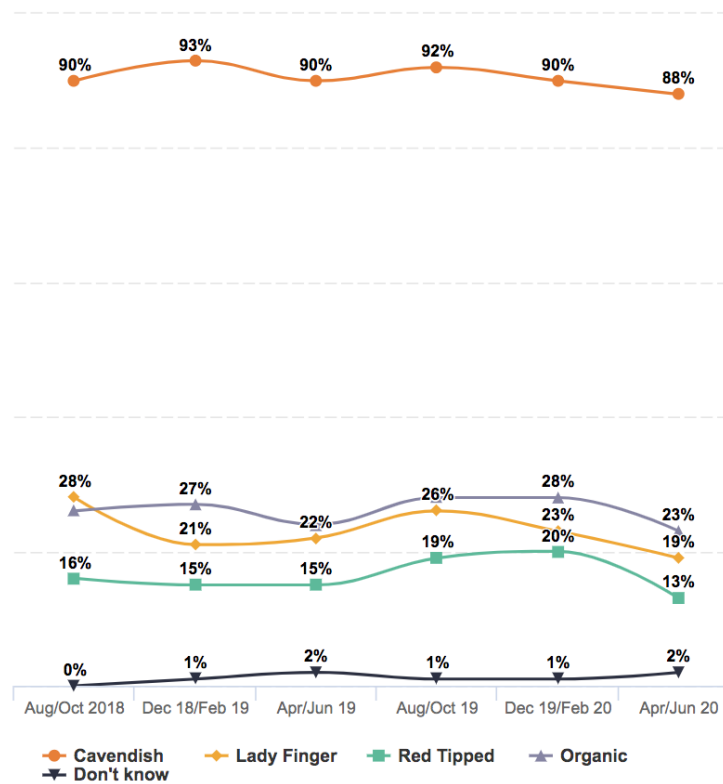
Q5. How likely are you to purchase a banana for household consumption in the next 2 weeks? Total n=600 each wave, Base: Total for each wave n=600; in Dec 19/Feb 20 25-39 years old n=173; Families with children <15 n=115

# The Cavendish variety is the most obvious one in shoppers' mind

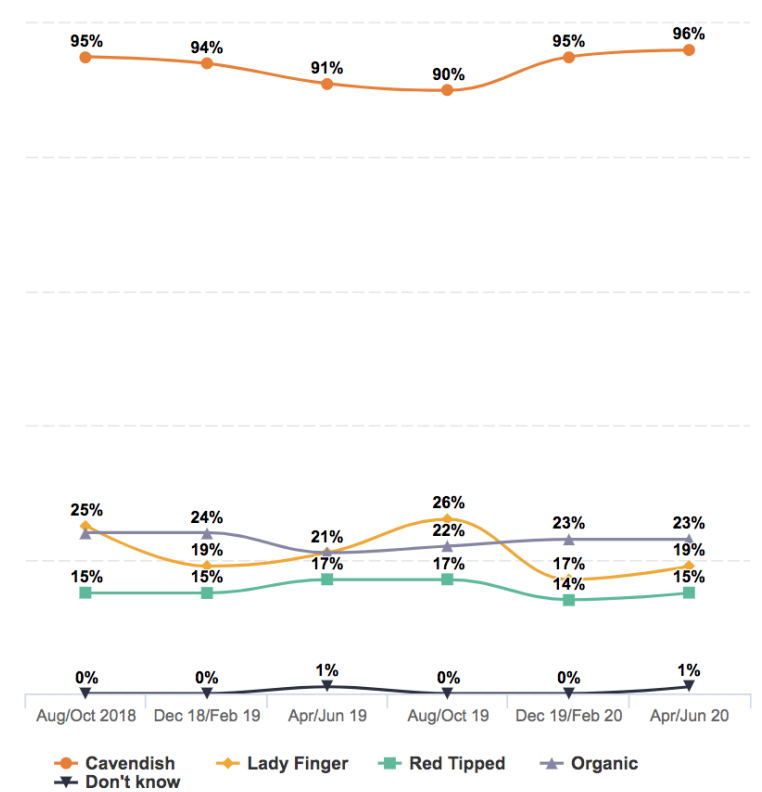
## VARIETIES CONSIDER NEXT TIME - TOTAL



## 25-39 YEARS OLD

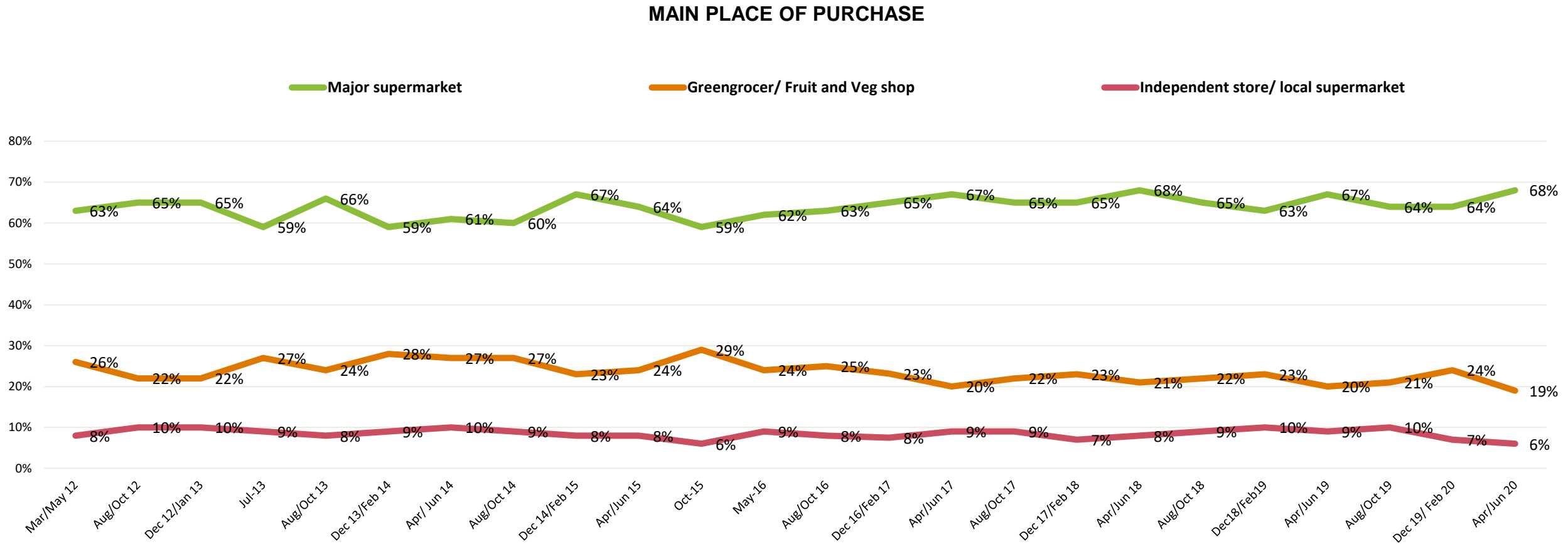


## FAMILIES WITH KIDS <15



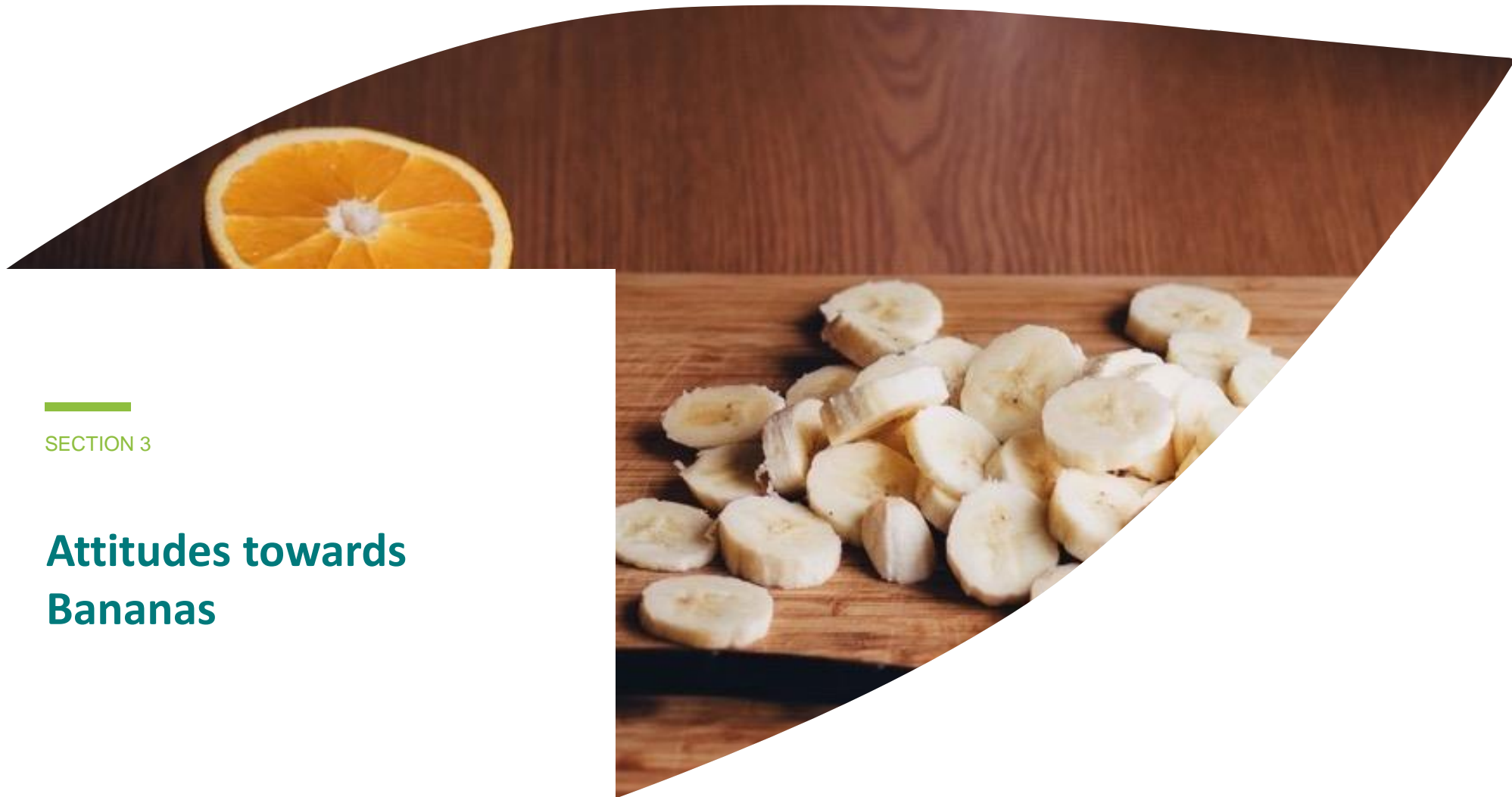
Q5VAR. Which of the following varieties of banana would you consider buying next time you go grocery shopping? Base: Total for each wave n=600; in Dec 19/Feb 20 25-39 years old n=173; Families with children <15 n=115

# At this time of the year, fresh fruit shopping tends to peak at Major Supermarkets



Q7. Which is the main place you buy fruit?

NB: data prior to Aug 16 includes a small number of apple, pear, avocado and banana buyers



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SECTION 3

## Attitudes towards Bananas



# Over 2 third of shoppers are satisfied with the quality of bananas available in store

## SATISFACTION WITH QUALITY OF BANANAS AVAILABLE FOR SALE RECENTLY



## KEY REASONS FOR SATISFACTION LEVEL

### SATISFIED

*The supermarket I go to have good quality bananas that keep for about a week.*

*They are fresh and remain that way up to a week.*

*The bananas are always fresh*

### NOT SATISFIED

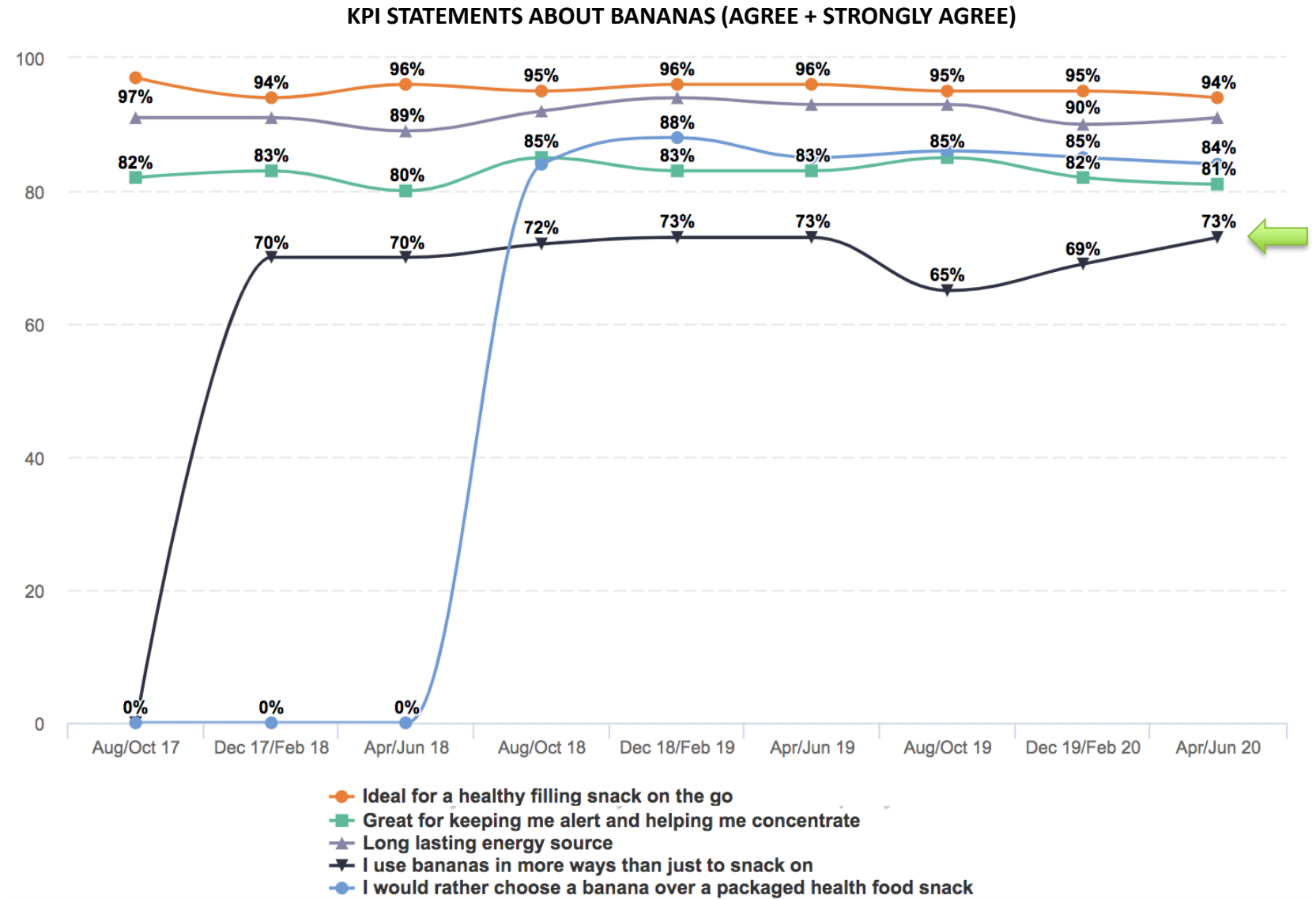
*Seem to be small and too ripe for my taste*

*they seem to go brown extremely quickly these days*

Q14a. How satisfied have you been with the level of quality of the bananas available for sale recently? Base n=600 each wave.

# Agreement with KPI statements remain high.

The number of people who **use bananas in more ways than just to snack on** has bounced back from a big drop in Aug/Oct 19.

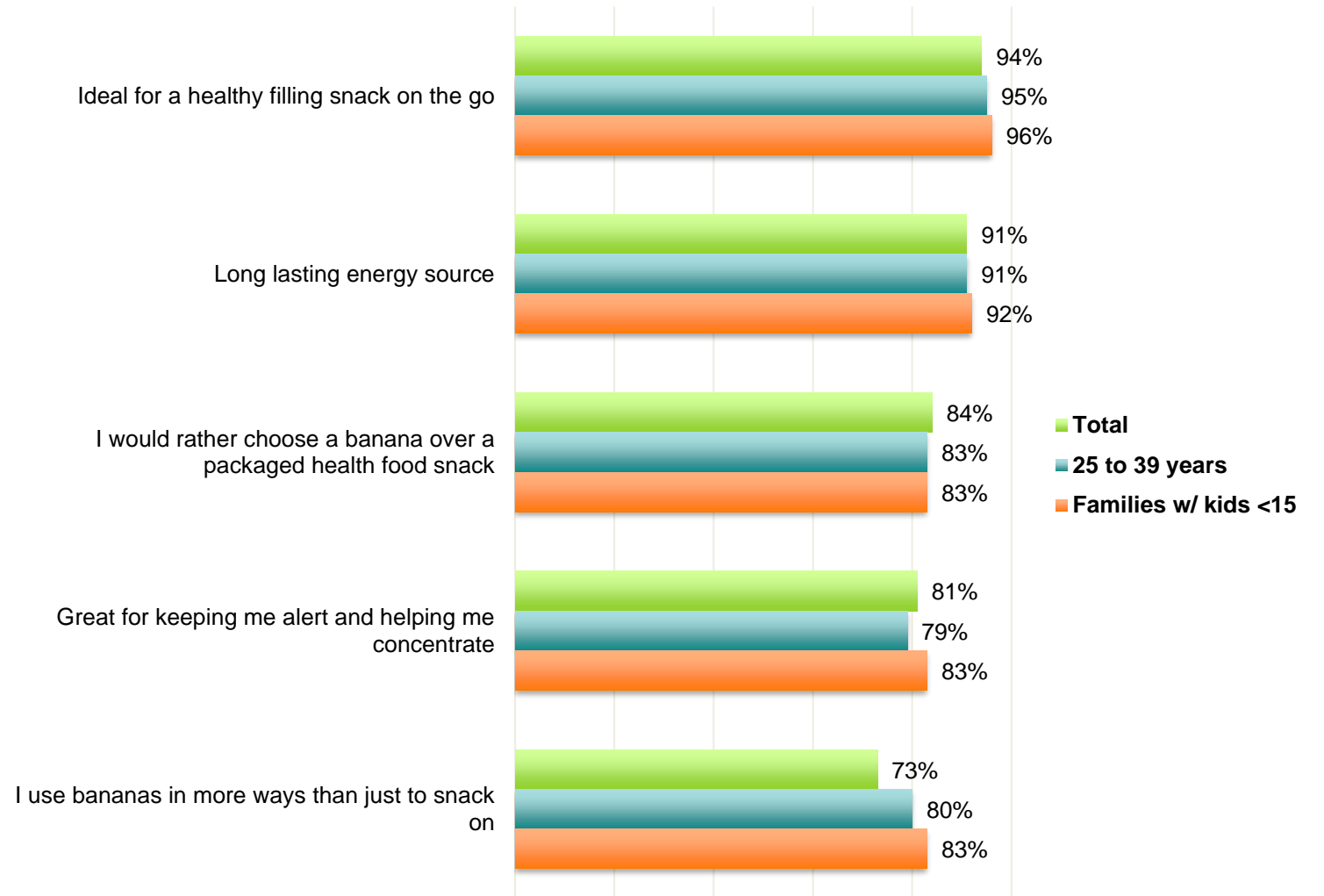


Q14. Please read the above statements about bananas and state your level of agreement with each. Base n=600 each wave.

Focus on Apr/Jun 20

And amongst the two target audiences, attitudes towards bananas are also highly positive.

KPI STATEMENTS ABOUT BANANAS – TOTAL AGREE



Q14. Please read the above statements about bananas and state your level of agreement with each. Base n=600 each wave. in Dec 19/Feb 20 25-39 years old n=173; Families with children <15 n=115

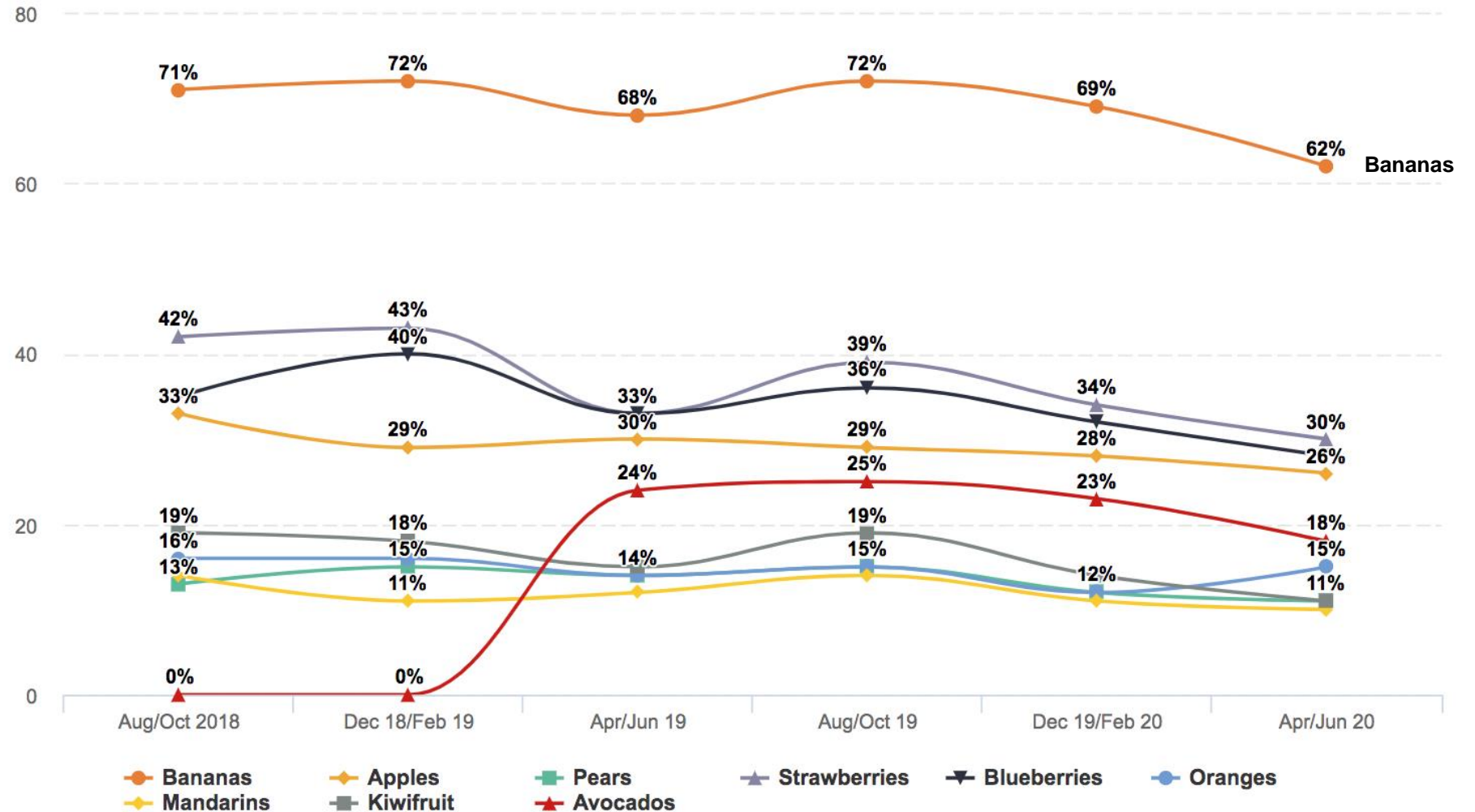


SECTION 4

## Consumption and usage habits

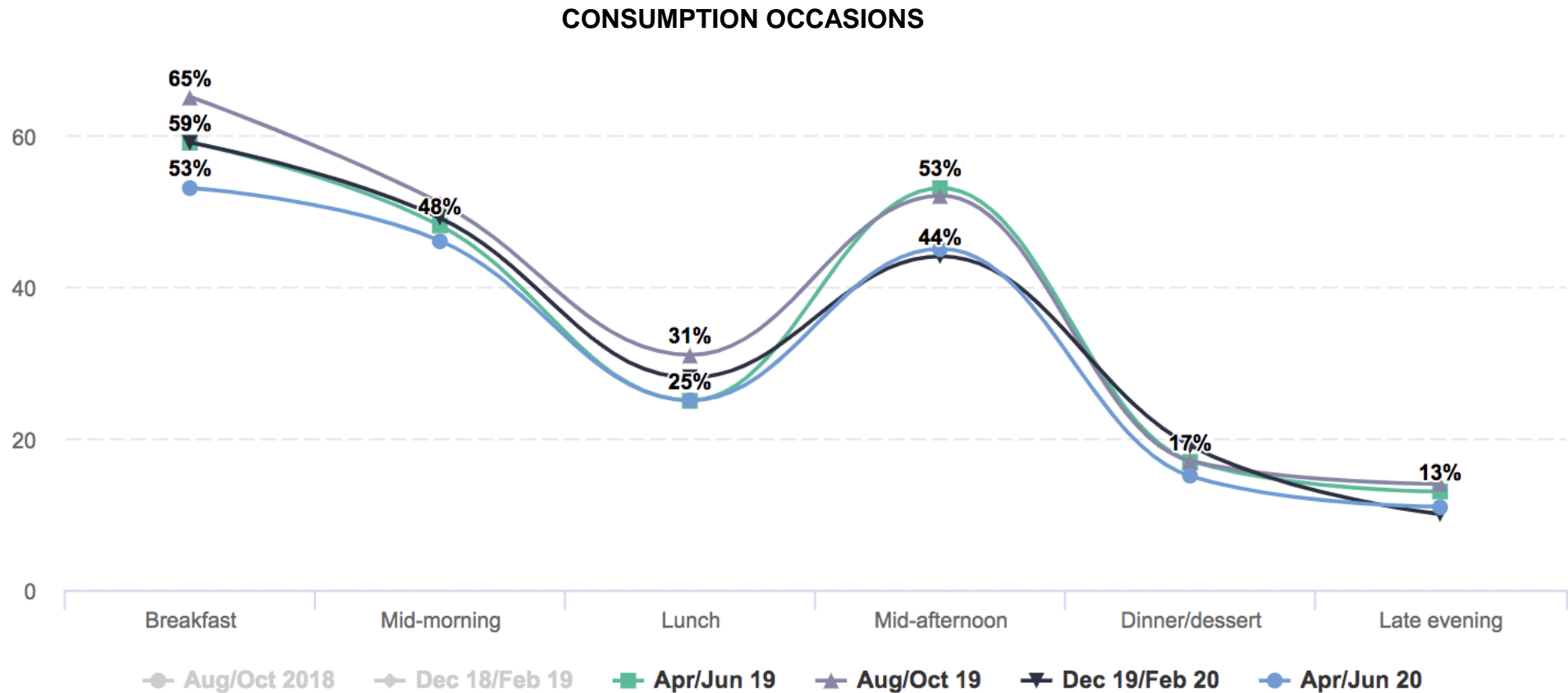
## FRUIT EATEN TO START THE DAY

**Bananas** continue to be by far the most popular fruit eaten to start the day even despite a little drop during the self isolation period



Q. Which of the following would you say is the type of fruit you might eat to start the day? Base: total n=600 each wave

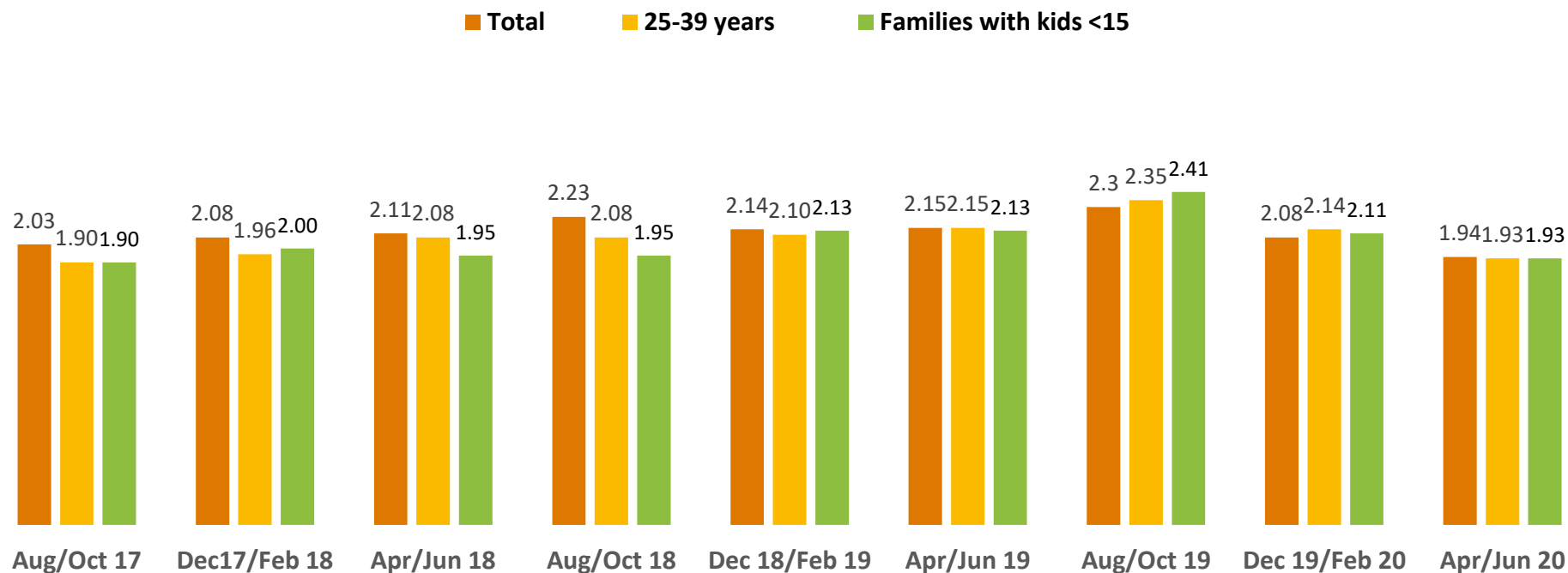
# More people are consuming bananas for dinner/dessert than before (and slightly less in Mid-afternoon)



Q5a. Which of these best describe when you usually eat bananas? Base: Total n=600 each wave

In the Covid context, fitness and energy related activities are reduced, which translates here in a slight decrease in the mean number of banana occasions/day.

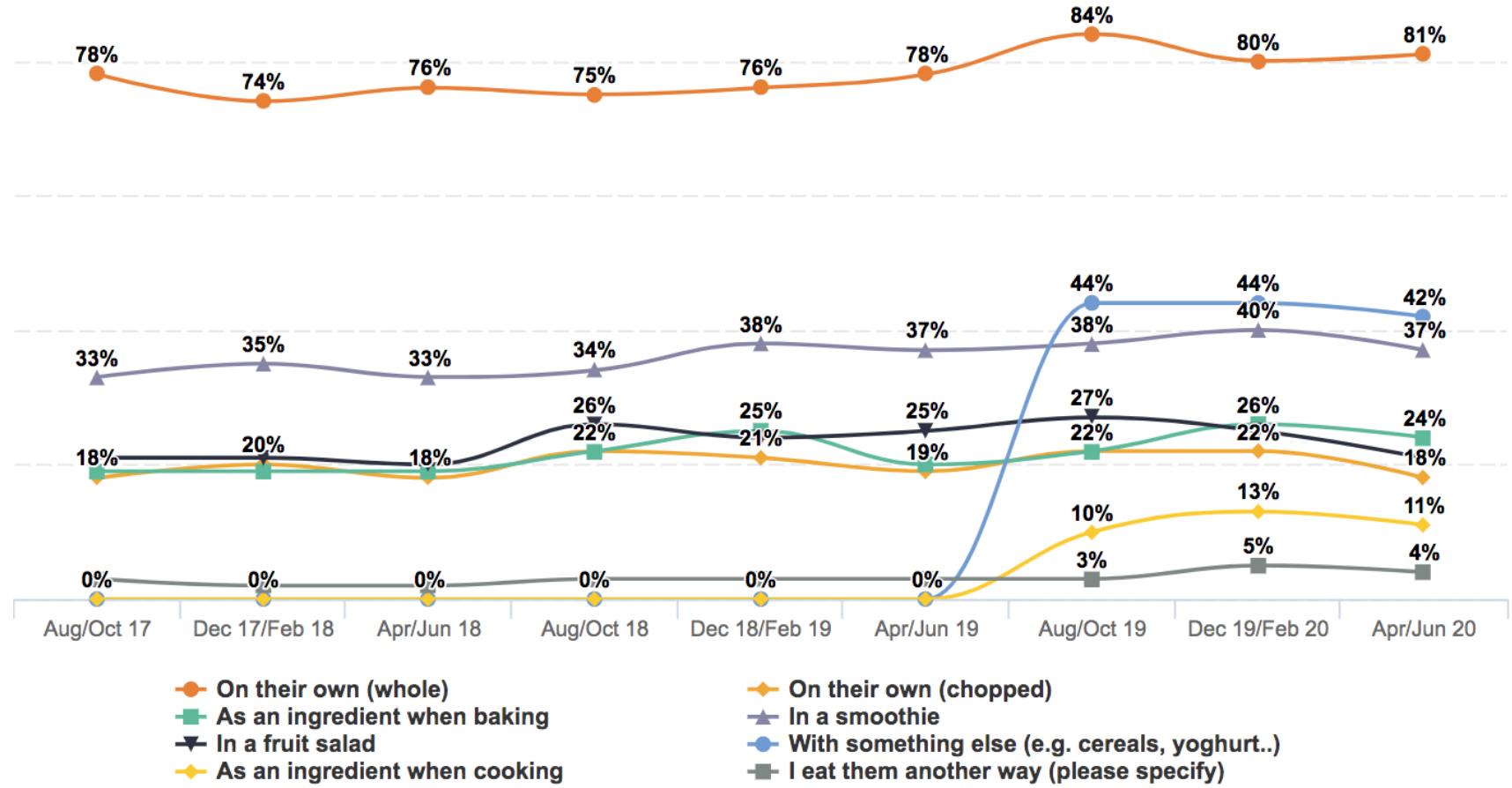
### MEAN NUMBER OF BANANA CONSUMPTION OCCASIONS



Q5a. Which of these best describe when you usually eat bananas? in Dec 19/Feb 20: Total n=600; 25-39 years old n=173; Families with children <15 n=115

Bananas continue to be eaten on their own the most.

### MODE OF CONSUMPTION



Q5b. How do you usually eat bananas? Base: Eat bananas – Dec 19/Feb 20 n=559



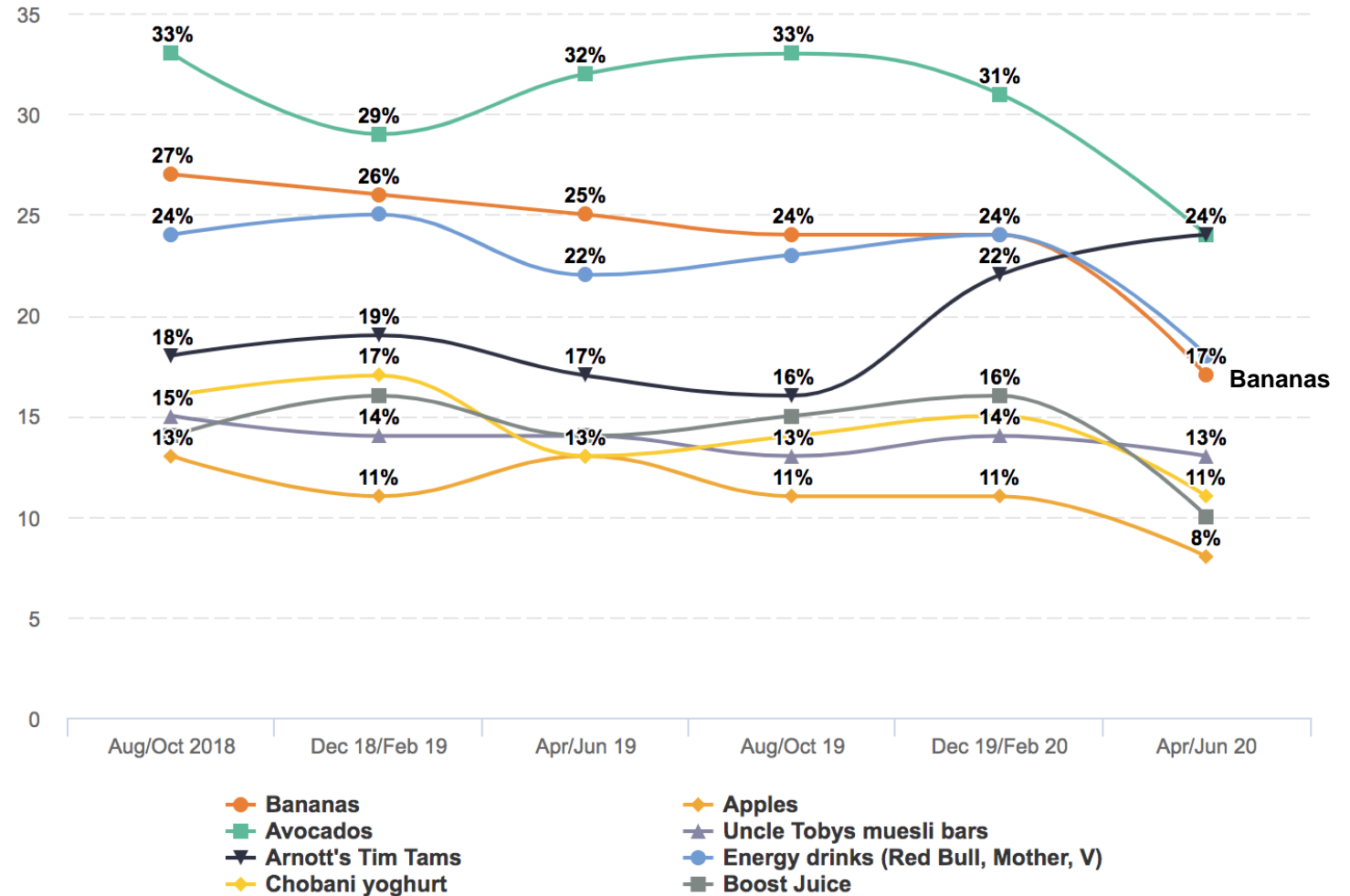
SECTION 5

## Advertising effectiveness



In this unusual context, media activity and information have been atypical.

### UNPROMPTED ADVERTISING RECALL



Q6. Which of the following have you seen or heard advertised in the last 2 months, either on TV, radio, magazines, in store or somewhere else? Base: Total each wave n=600

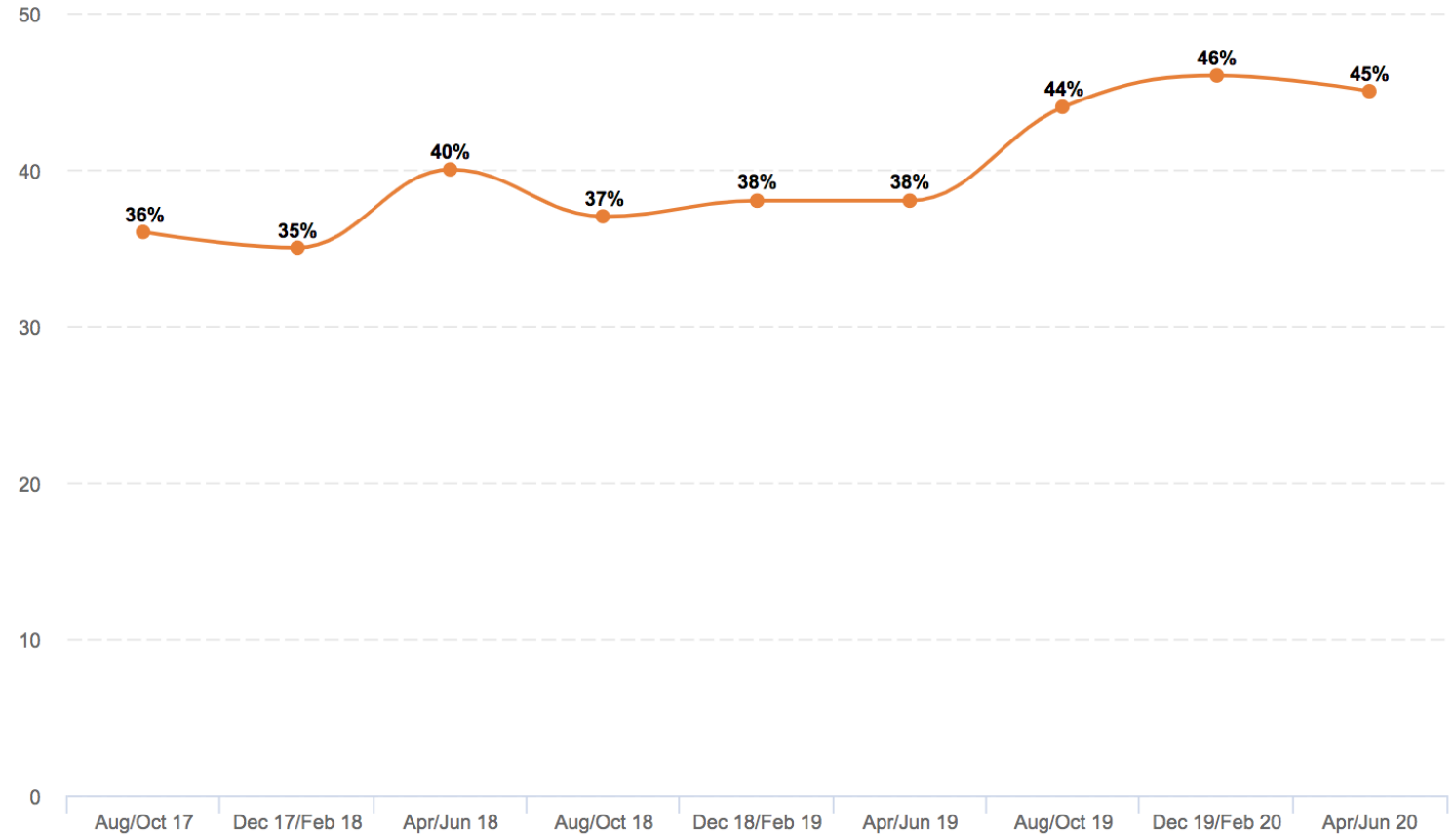
However, thanks a consistent and salient campaign, Australian Bananas ads recall remains high, even during this off-media period.

As an indication, Ad Recall Benchmarks:

Category	Prompted Ad Recall
Food	24%
Technology	17%
Beauty	27%
Mobile phone	23%
Travel	42%
Automotive	26%



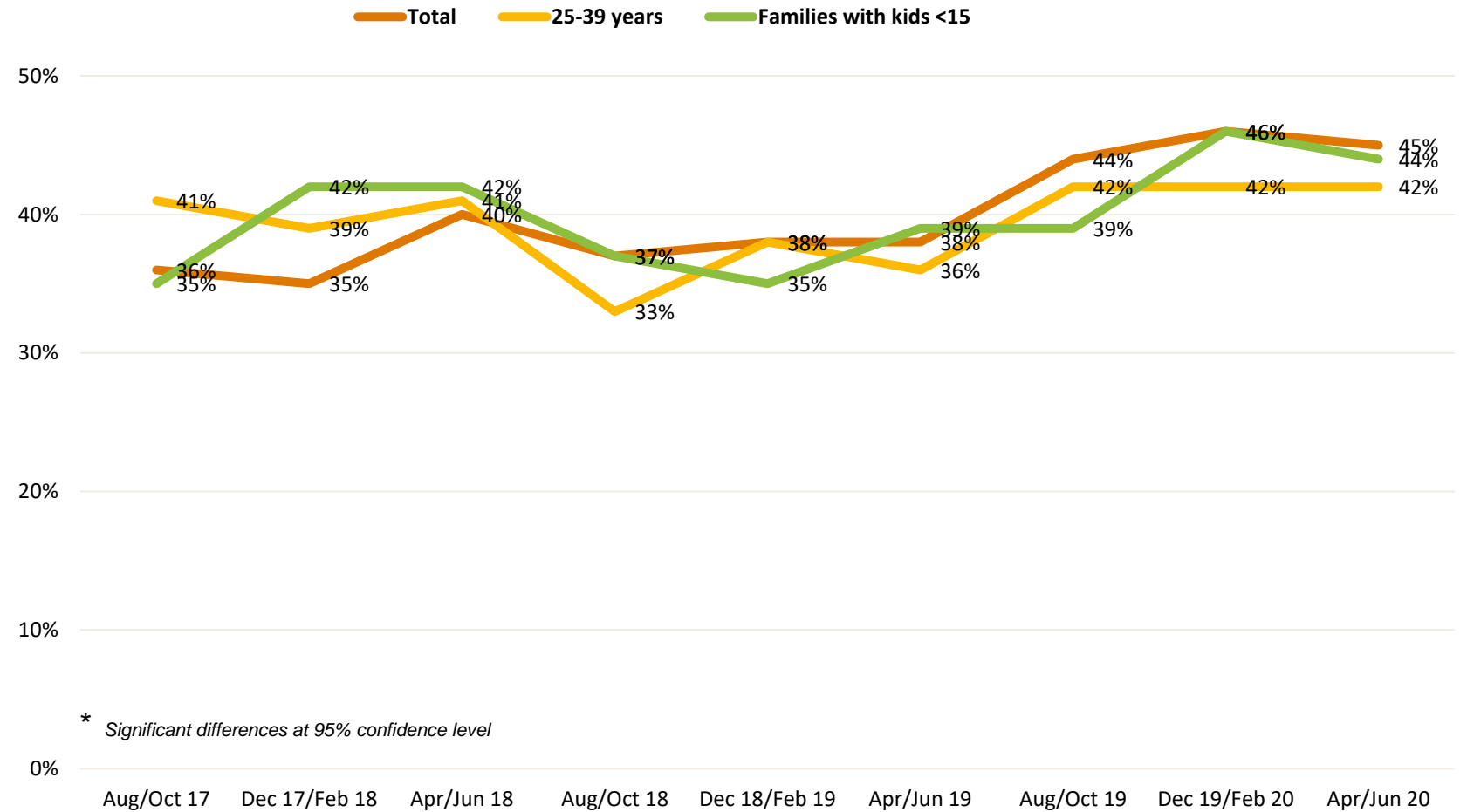
PROMPTED AD RECALL



AB2. Do you remember seeing any of these or similar ads from this advertising campaign before? Base: Total n=600 each wave; Dec 19 and Feb 20 n=300 each

An ad recall that remains stable across the 2 key target audiences

PROMPTED AD RECALL – BY KEY AUDIENCE

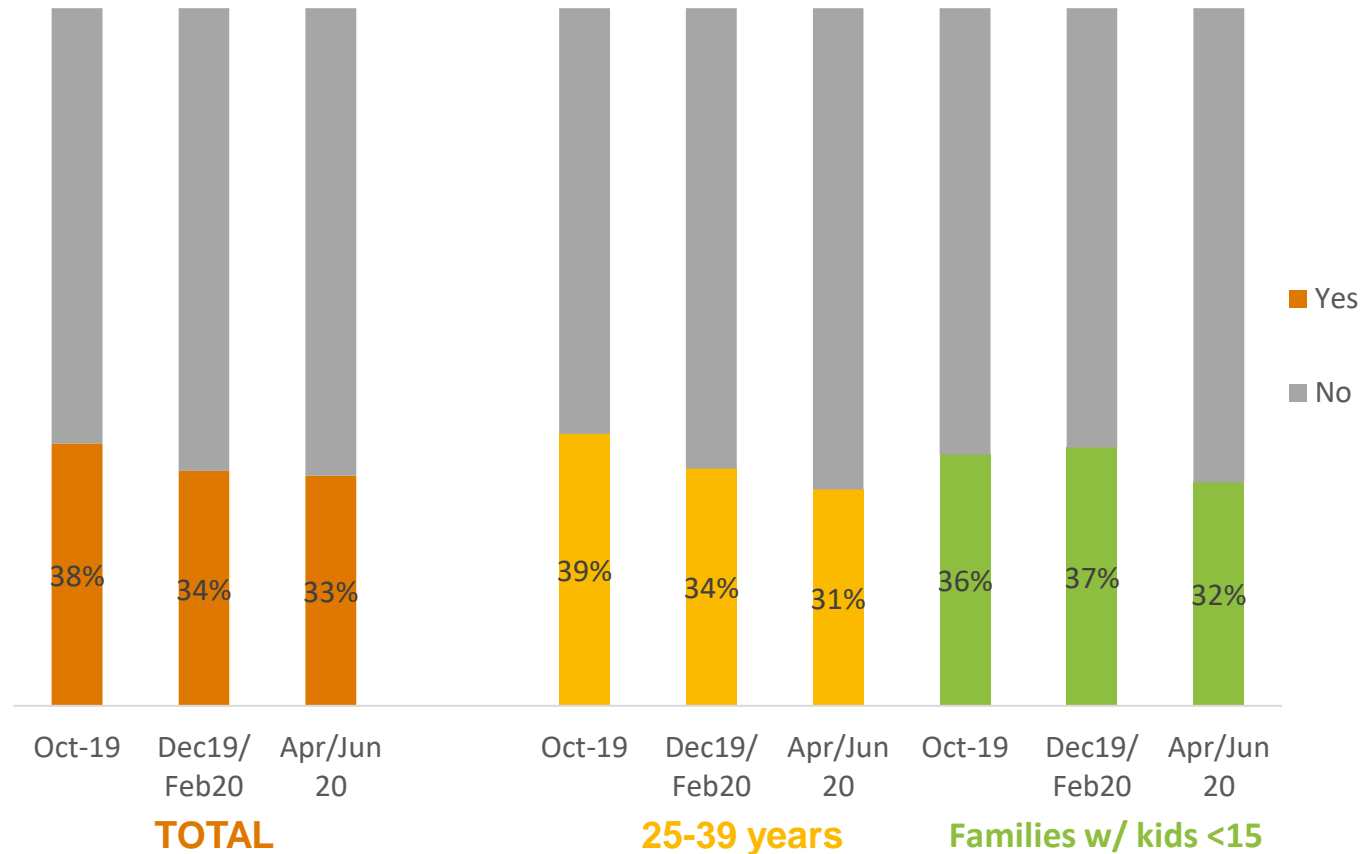


AB2. Do you remember seeing any of these or similar ads from this advertising campaign before? Base: Dec 19/Feb 20, total n=600, 25-39 years old n=173; Families with children <15 n=115

Interestingly, even off media the tagline recall remains rather strong

PROMPTED TAGLINE RECALL – BY KEY AUDIENCE

*“Peel good, feel good”*

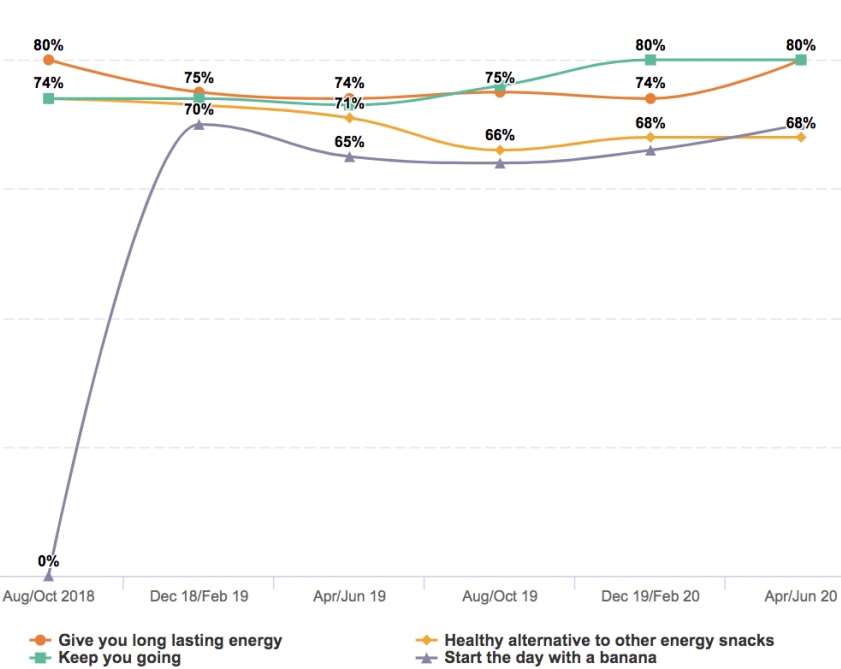


Recall for  
*“Make your  
 body sing”*  
**50%**  
 (Apr/Jun 20)

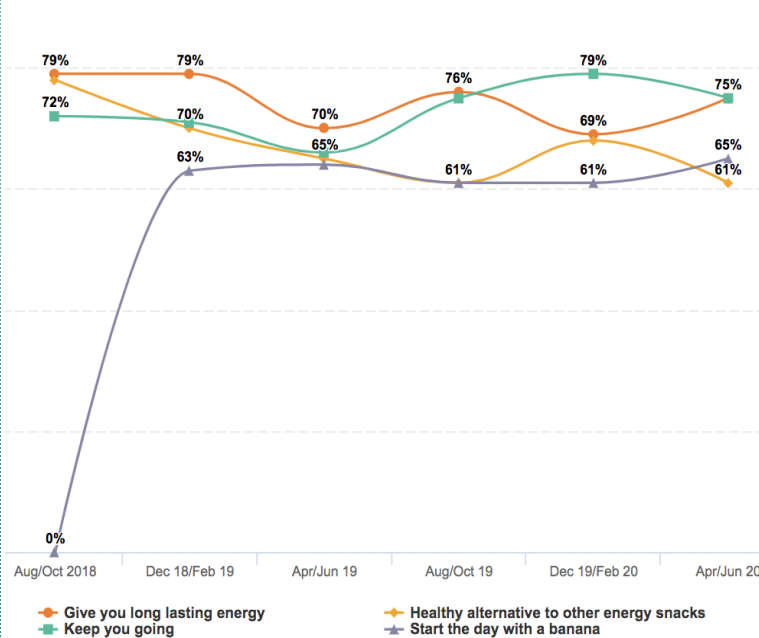
ABtagline. Do you remember seeing or hearing the tagline above before today? Base: Total n=600, in Apr/Jun 19 25-39 years old n=173;; Families with children <15 n=155

# Key message take outs continue to be associated with energy, with increases in “Keep you going” and “Give you long lasting energy”

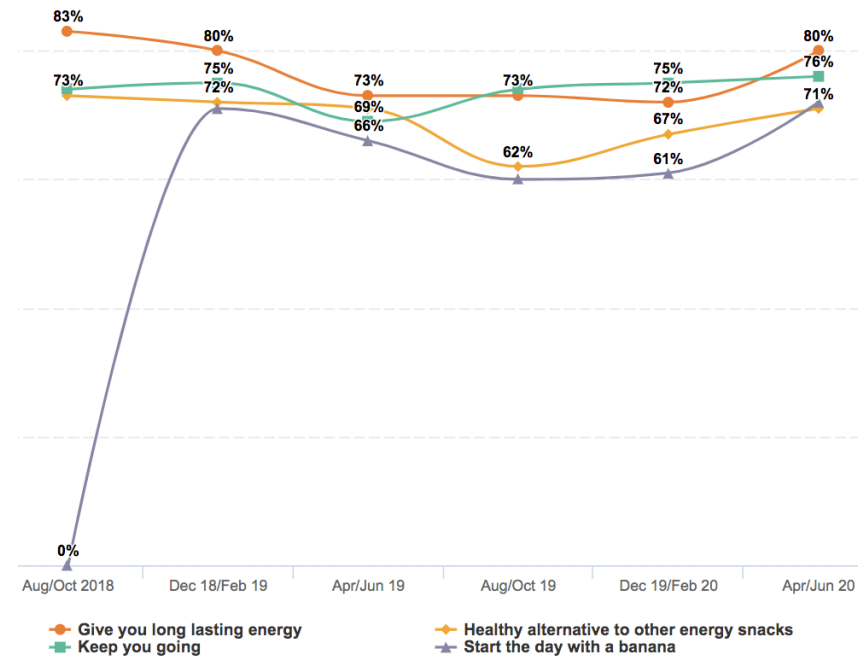
MESSAGE TAKE-OUT - TOTAL



25-39 YEARS OLD



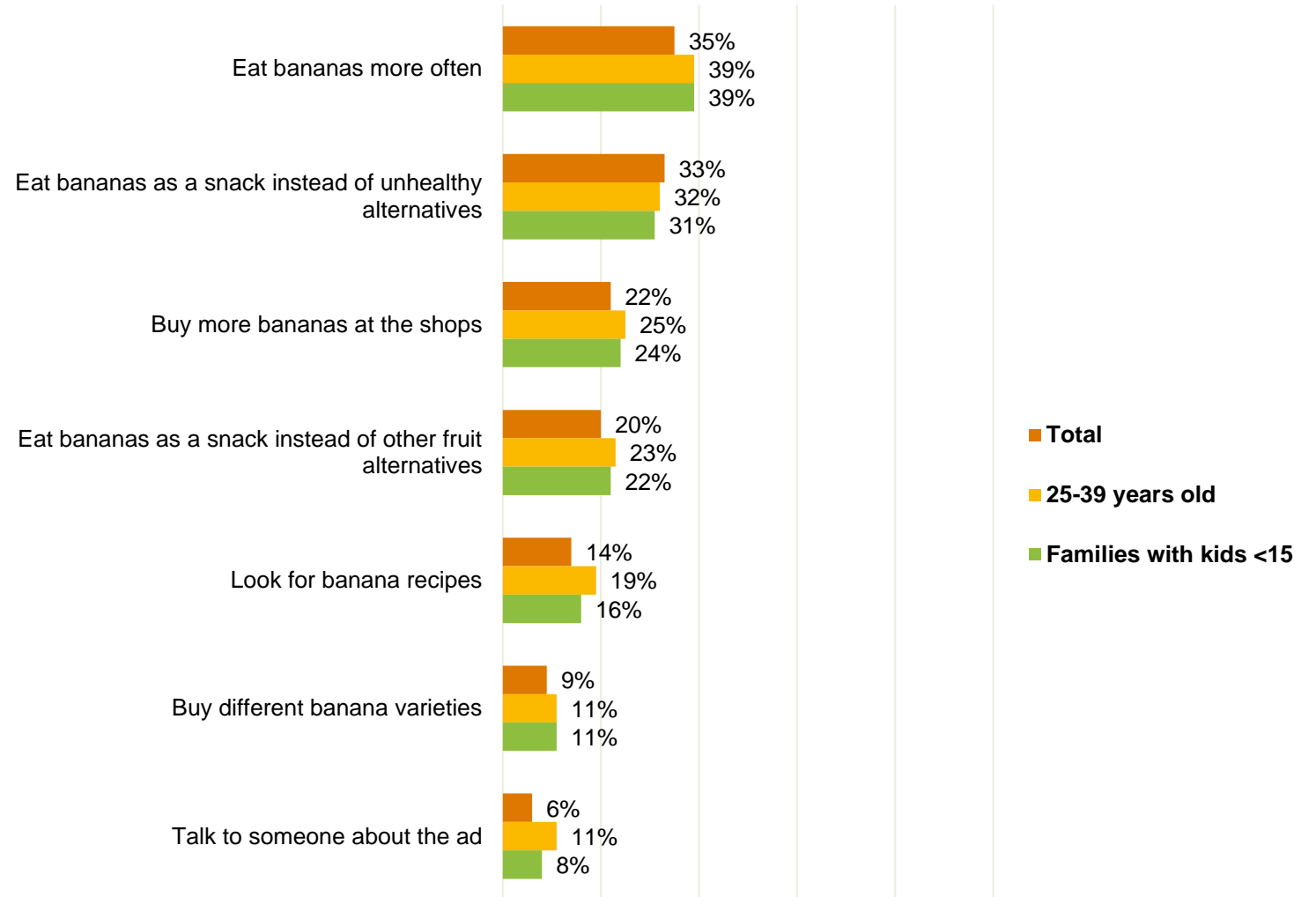
FAMILIES WITH KIDS <15



AB3. What do you think the ads are trying to tell you? Base Total n=600 each wave in Aug/Oct 19 25-39 years old n=170; Families with children <15 n=135

65% are likely to take some form of action as a result of seeing the ads. The 25-39 years demographic are most likely to take action after seeing advertising

ACTIONS LIKELY TO TAKE AFTER SEEING ADVERTISING



AB4. And as a result of seeing these ads for bananas, which of the following actions are you likely to take? Base Aug/Oct 19 Total n=600, 25-39 years old n=170; Families with children <15 n=135

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## Insights summaries

## CATEGORY

The Covid outbreak definitely had an impact on purchase behaviour towards bananas (people shopping less often; people eating more at home; people snacking much more).

Amongst the energy snacks, the most affected are the ones directly related to energy, fitness, or outdoor activities.

As such, bananas remain the clear favourite energy snack, but are experiencing a drop from 76% to 68%.

Each year at this period, Bananas are slightly dropping as the #1 favourite energy snack.

That said, encouragingly even in this extreme context, Bananas remains the favourite snack of almost 1 in 3 consumers, and we can already see small signs of 'recovery' in June 2020.

## PURCHASE BEHAVIOUR

Intention to buy bananas in the next two weeks and satisfaction towards the quality of bananas available has remained high the whole period.

## ATTITUDES

Attitudes towards bananas remains largely positive (healthy; high energy; convenient snack).

If anything, it's interesting to note that associations with 'versatile', 'happy & fun' and 'morning' have slightly increased this wave.

## EATING HABITS

In the Covid context, fitness and energy related activities are reduced, which translates here in a slight decrease in the mean number of banana occasions/day.

## CAMPAIGN

Thanks to a consistent and salient campaign, Australian Bananas ads recall remains high, even during this off-media period.



A hand holding a dandelion seed head against a warm, golden background. The image is partially obscured by a large, curved, semi-transparent overlay that transitions from a dark brown on the left to a light yellow on the right.

CONTACT

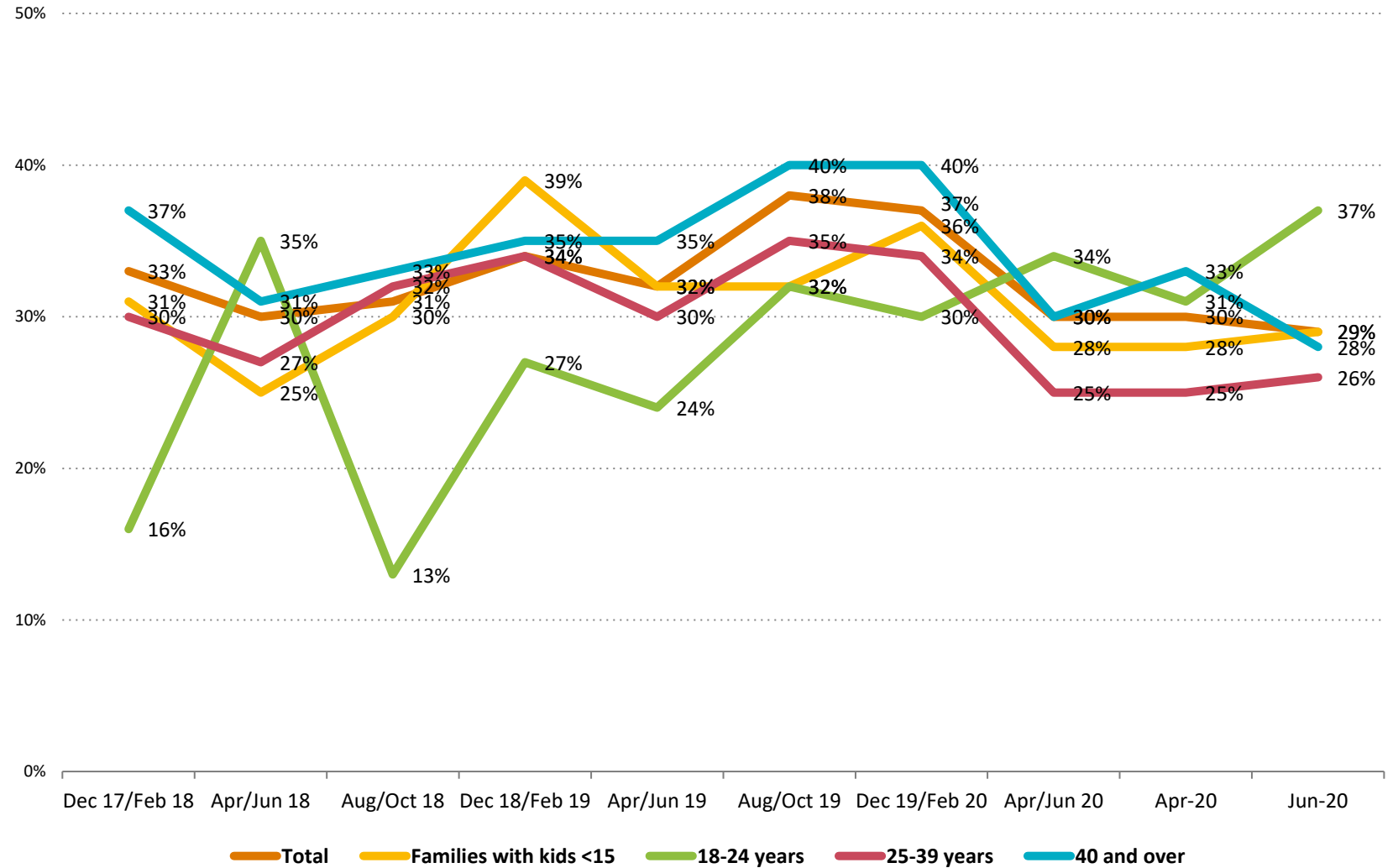
**Flora Delecour**  
Research Project Director  
[flora@edentify.com.au](mailto:flora@edentify.com.au)



**APPENDIX**

The consolidation of #1 ranking energy snack is driven by the broad audience.

RANK BANANA AS #1 ENERGY SNACK – BY KEY AUDIENCE



Q1a. Please select your top 5 preferred energy snacks from the following list. Base: Total for each wave n=600; in Dec 19/Feb 20 25-39 years old n=173; Families with children <15 n=115