



PROJECT HARDCORE

HORT INNOVATION › MAY 2020

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CONTENTS

- 01 Business Need and Objectives
- 02 Shopper Learnings
- 03 Apple Occasions
- 04 Taste Preferences & Quality Indicators
- 05 Categorisation & Tiering
- 06 Response to the Stimulus
- 07 The Last 5 Minutes





SECTION 1

BUSINESS NEED AND OBJECTIVES

THE BUSINESS NEED

To grow the category, Hort Innovation has focused on a particular category growth driver: Inspired Choices. The aim of this strategy is to help consumers make better decisions at the point of purchase to encourage trial, increase frequency by broadening apple occasions and identify trade up opportunities



RESEARCH OBJECTIVES

KNOW OUR CONSUMERS

Understand apple **attitudes**, **behaviours**, **usage** and **occasions**

Explore **taste preferences** and **conceptualisation** e.g. sweet, tart

Understand **what defines quality** and drivers of **trade-up opportunities**

EXPLORE CATEGORY TIERING

Explore the efficacy and role of **tiering point-of-purchase signage** and education devices

Explore **how customers make choices** given a potential tiering system in store

EXECUTE SUCCESSFULLY

Identify any **barriers** to helping consumers make better decisions

Determine how to **encourage trial** and increase frequency by **broadening apple occasions**

Understand and **identify trade up opportunities**



WHO WE SPOKE TO

We recruited **8 foodies**, key attitudinal segment targets identified in the earlier quantitative phase. The sample included key demographic targets, **young families** and **SINKS/DINKS** aged 25-45.

We conducted **8 x 1hr** one-on-one **online in-depth interviews** which enabled easy sharing of visual stimuli (point-of-purchase communications). Prior to the session, participants completed a **pre-task** and were sent a delivery of eight apple varieties to facilitate sensory exploration of quality attributes.

# of interviews	 PRAGMATIC FOODIES	 SWEET-TOOTH FOODIES
YOUNG FAMILIES	2	2
SINKS/DINKS	2	2



- Further sample considerations:
- All were regular / semi-regular apple buyers (purchased apples in the past two weeks)
 - Key decision makers in regards to apple purchasing and consumption
 - Sydney location (mix of region)

RESPONDENTS TRIED 8 UNIDENTIFIED APPLE VARIETIES LEADING UP TO THE DISCUSSION



Modi™



Pink Lady®



Fuji



Red Delicious



Jazz™



Royal Gala



Kanzi™



Granny Smith

ANOTHER BATCH OF THE SAME VARIETIES WERE USED FOR DETAILED SENSORY EXPLORATION DURING THE DISCUSSION

Participants were given a second batch of the same 8 varieties they tasted in the week leading up to the discussion. This task was used to facilitate sensory exploration of quality attributes and accelerate the conversation, sparking naturalistic comparison behaviours.

It also enabled reflection of the pre-recorded flavour and texture characteristics e.g., sweet, tart, crunchy, crispy, bitter etc for each apple and contrast this with the visual qualities noted during the session.



INTRODUCING OUR FOODIES...

SWEET-TOOTH FOODIES				PRAGMATIC FOODIES			
							
1	2	3	4	5	6	7	8
STRICTLY SWEET FRUIT FOODIE	MY TRUSTY COMPANION	FRESH, CRISPY AUSSIE APPLES	SWEET & CITRUS CURBS CRAVINGS	CRUNCHY WITH TART AFTER TASTE	SWEET WITH A HIT OF TANG	AN ABSOLUTE NO- BRAINER	SMALL, SWEET & TART
A strictly sweet fruit-eating family. Gooney apples are a no-go	An apple is like a reliable friend you can take anywhere. Even eat the core for a no-mess snack!	A 'happy' apple is fresh and crunchy. It's nutritious and you can carry it in your pocket	A pink lady hits the spot to satisfy sweet cravings. An afternoon or after dinner pick-me-up	Steers clear of overly sweet apples, tart is best! But a red apple in a salad gives it a nice pop of colour	Seeking a sweet apple with a crunchy, juicy tang. It's an apple – or nothing!	Apples are reliable, durable, and keep the entire family happy	The perfect apple is crunchy and fits in the palm of your hand so it's not a burden to finish



SECTION 2

SHOPPER LEARNINGS

SHOPPING FOR APPLES ISN'T OVERLY DIFFICULT

THERE ARE CURRENTLY NO MAJOR PAIN POINTS TO SOLVE

AT FACE VALUE, SHOPPING FOR APPLES IS EASY AND AUTOMATIC

Buying apples is often an unconscious, automatic process. Some take time to carefully select an apple, while others 'grab and go', but despite the approach it's considered easy and straight-forward.

This ease is potentially due to falling back on tried and tested 'go-to' varieties. There is a sense of reliability and reassurance when it comes to selecting varieties with high familiarity.

BUT EXPERIMENTATION IS LOW. PEOPLE TEND TO STICK TO FAMILIAR VARIETIES

Loyalty to one to two varieties is common. The main trigger for trialling a new variety is if go-to varieties are out of stock or unavailable.

Preference for a particular variety will often outweigh other considerations e.g., if a variety is out of stock in loose format, a packaged version of the intended variety will typically be selected despite quality concerns.

Whilst shopping for apples isn't considered difficult, there is an underlying need for shoppers to feel more informed, and tension exists in that apple-lovers don't want to risk a bad apple for taking a punt on a new variety.

“

“You go for the brands that you know work 9/10 times. These are the sure shot winners”

- SWEET-TOOTH FOODIE, YOUNG FAMILY

”

“

“I know what to expect with a Granny Smith, it's totally reliable for making apple sauce and baby food. But why buy 2 kilos of apples when you can just buy 1kg with multi-purpose uses.”

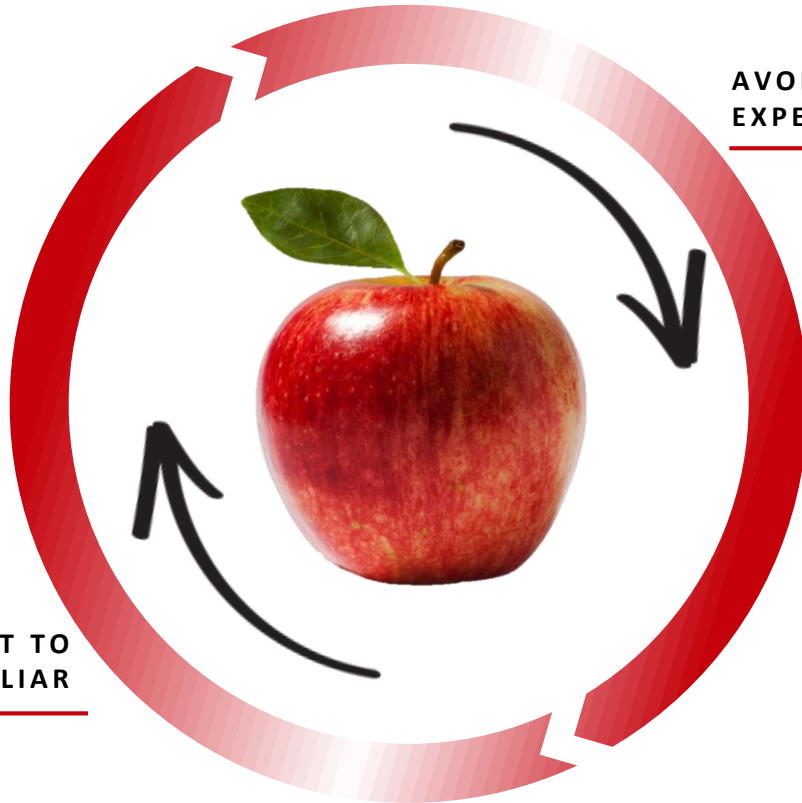
- PRAGMATIC FOODIE, YOUNG FAMILY

”



EXPERIMENTATION IN NEW VARIETIES IS LOW, FUELLED BY RISK AVERSION WHICH TRIGGERS AND REINFORCES RESISTANCE TO TRIAL BEHAVIOURS

FAMILIARITY CYCLE



RESORT TO
WHAT'S FAMILIAR

AVOID AN UNPLEASANT
EXPERIENCE

UNFAMILIAR APPLES ARE EVALUATED ON APPEARANCE

With visual cues the only way to gauge unfamiliar varieties, a perceived lack of visual differentiation leads to risk aversion behaviours. For example, if a new variety is visually similar to another that has negative connotations based on previous experience, the new variety will typically be avoided to prevent an adverse eating experience.

“

“I normally go for a pink lady. The taste is very consistent, you know what you’re going to get. That’s why it frustrates me when I try a different apple and it’s floury or I feel like it’s been sitting on the shelf for too long. That’s why I go for what I go for, because a pink lady is always consistent.”

- PRAGMATIC FOODIE, YOUNG FAMILY

”



SECTION 3

APPLE OCCASIONS

PEOPLE AREN'T THINKING BEYOND SNACKING OCCASIONS

THIS LIES AT THE FOREFRONT OF POINT-OF-PURCHASE DECISION MAKING

APPLES GENERALLY AREN'T DIFFERENTIATED BASED ON OCCASION

Snacking is the dominant occasion in mind at point-of-purchase. Decisions are primarily focused on *eating* the apple. Even those using apples to cook or bake with generally prioritise their 'go-to' variety for eating, and cooking occasions are considered down the line, when the apple is beginning to over-ripen.

SNACKING OCCASIONS ARE BROAD

Snacking isn't limited to a specific time of day, but can occur after any meal or as a replacement when a meal is missed.



“

“When I go to buy my apples, I don't differentiate them thinking ‘this is only for snacking’ or ‘this is only for cooking’... It's one fruit that's going to be used for everything. If it's been on the shelf too long, that's when I'll use it for baking”

- SWEET-TOOTH FOODIE, YOUNG FAMILY

”

“

In response to merchandising visual:
“At the moment my mind is thinking about apples to eat. But maybe in a few days time, I'm thinking about making a salad and I want to try something new I'll remember what one was good for a salad and go back”

- PRAGMATIC FOODIE, YOUNG FAMILY

”

THERE IS A LACK OF AWARENESS OF WHICH OCCASIONS A VARIETY IS STRONG IN, BUT AN APPETITE TO FIND OUT MORE EXISTS

“

“I’ve seen these hybrid apples, sometimes I go past them and think ‘this looks good’. The apple looks perfect. Its smallish, fits in the palm of your hand, firm. But I just don’t want to buy it because I don’t know what it tastes like.”

- PRAGMATIC FOODIE, SINK/DINK

”

“

“I don’t really venture outside of what I know. If I do, I just pick an apple and hope for the best. Sometimes I’ll google ‘what’s the best apple for baking’ for recipes I find on Pinterest, but the descriptions might be US based so it’s not relevant at all.”

- SWEET-TOOTH FOODIE, SINK/DINK

”



Awareness of varieties outside their go-to is low



With a tendency to favour go-to varieties, awareness of remaining varieties is low. Given this unfamiliarity, any notion of what the taste characteristics entail is based on appearance alone.



Knowledge of occasions varieties are strong in is low



With most currently shopping for a snacking occasion in mind, shoppers are prioritising taste preferences over occasion suitability. For some users of apples for baking, the link between Granny Smith and baking is already established, but for other varieties it’s unclear.



Openness to using apples in other occasions exists but it’s not top of mind

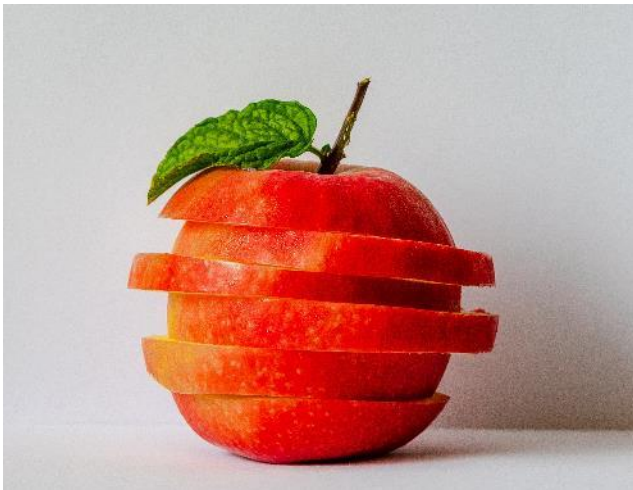


Despite the lack of knowledge on occasion uses, there is a desire to find out more. Respondents spontaneously called upon in-store messaging to educate on the best varieties for certain occasions e.g., for salads, for baking etc.



SECTION 4

TASTE PREFERENCES & QUALITY INDICATORS



FIVE THINGS THAT MAKE A GREAT APPLE

APPEARANCE GUIDES DECISION MAKING HEAVILY, ESPECIALLY WHEN UNFAMILIAR WITH THE VARIETY

1 TEXTURE

Crunchy, crispy apples are **synonymous with quality**. Apples should be firm to the touch and don't give way when you press is slightly



"I know I probably shouldn't do this, but I'll give it a slight press just to make sure it is firm and bounces back."

- PRAGMATIC FOODIE

2 TASTE

Flavours should be **bold**. An apple is ideally **sweet** (but not overly) and sometimes **tangy** to act as a **refreshing** zing



"We are a sweet fruit-eating family but I like my apples to be a little bit tarty too. It balances out the sweetness"

- SWEET TOOTH FOODIE

3 APPEARANCE

Colours should be **bright** to indicate they are **fresh** and **ripe**. Streaks of yellow and green are associated with **life** and **health**



"With those streaks of colour it looks healthy. I don't like purely green apples but when it's got pink and green/yellow it makes me think it's sweet but also fresh and crunchy"

- SWEET TOOTH FOODIE

4 SIZE

A **large** size is expected to be good **quality**, but a **smaller** size is considered more **flavoursome** and **juicy**. Size also speaks to **convenience**



"An apple that's too big is a burden to finish. The perfect apple fits in the palm of your hand."

- SWEET TOOTH FOODIE

5 SHAPE

The ideal shape is **round**, not squashed or elongated. Many have a preconceived notion of what it *should* look like in terms of shape



"If an apple is consistently round and has the little dimple at the top, it reminds me of the apple emoji. It's the shape you learn to draw as a kid."

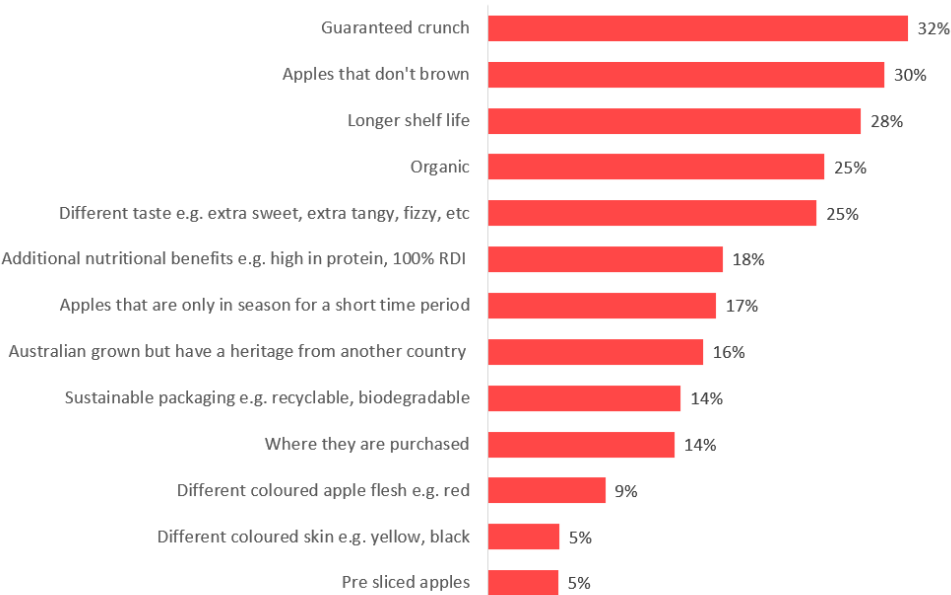
- PRAGMATIC FOODIE



QUANTITATIVE FLASHBACK: RESULTS SHOW THAT CRUNCH AND FLAVOUR ARE NOT ONLY ASSOCIATED WITH QUALITY, BUT ALSO WITH A WILLINGNESS TO PAY MORE

Most appealing characteristics are those that related to taste and quality

Characteristics that are worth paying more for

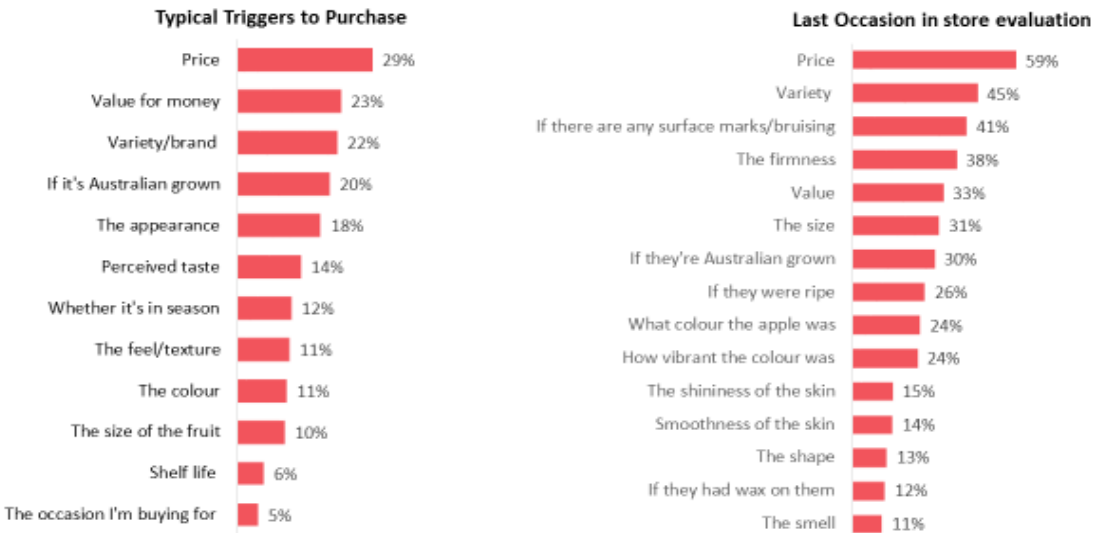


FIFTYFIVES. HIA. PROJECT HARDCORE 2019. FIELDWORK CONDUCTED IN JULY - AUGUST 2019.

Guaranteed **crunch**, **appearance**, and **taste** rank highly amongst the attributes that customers would pay a premium for

Price the most important factor in deciding whether to buy Apples, and which to buy, followed by the variety

Influences in store



NEED TO GIVE SHOPPERS A REASON THEY SHOULD BE PAYING MORE

FIFTYFIVES. HIA. PROJECT HARDCORE 2019. FIELDWORK CONDUCTED IN JULY - AUGUST 2019. CODES WITH MORE THAN 5% SHOWN

Price and value are the primary decision drivers, but **appearance**, **texture**, and **taste** are key influences at point-of-purchase



IN TERMS OF DECIDING QUALITY, TASTE AND TEXTURE ARE ON TOP

A HIERARCHY OF FACTORS THAT DEFINE QUALITY IN APPLES



THE 'CRUNCH FACTOR'

CRUNCHY, CRISPY APPLES ARE THE ULTIMATE GOAL

1

“

"I wish I could eat it again. It was the crispiest apple ever, outstanding. I had to get my husband to cut it for the experience. I haven't had an apple that cuts as nicely as that."

- PRAGMATIC FOODIE, YOUNG FAMILY

”

“

"I think mentally you just associate an apple with crunch. When you bite into it and feel that crunch you can tell that it's quite fresh."

- PRAGMATIC FOODIE, YOUNG FAMILY

”

- Crunchy apples are worth paying more for, and represent the epitome of a quality apple. Regardless of taste preferences, crunchy, crisp apples are sought after.
- A crunchy apple is consistently crunchy, through to the centre. The skin is firm, tight and crisp to allow biting into it easily. Crunchy apples are associated with having the best flavour, being sweeter and more juicy.
- The biggest motivator for selecting loose apples is to test the firmness as an indicator of expected crunch. If an apple doesn't deliver on being crunchy, it's often considered not to be worth finishing



A GREAT APPLE IS SWEET, BUT NOT ALWAYS

TART, TANGY FLAVOURS BALANCE OUT SWEETNESS

2

SWEETNESS IS IMPORTANT TO CURB CRAVINGS (BUT NOT OVERLY SWEET!)

A sweet apple hits the spot to satisfy sweet cravings with the benefit of being a healthier, natural option. Some prefer to stray away from varieties that are purely sweet e.g. Fuji

SOME SEEK A TART, CITRUS ZING TO REFRESH AND CLEANSE THE PALETTE

Even some sweet-tooth foodies preferred a tart, tangy component to balance out sweetness. A tart aftertaste helps create a sense of feeling refreshed and energised.

“

“I need something sweet or I just won’t be satisfied”

- SWEET-TOOTH FOODIE, SINK/DINK

”

“

“Apples with a bit of a tangy aftertaste are my favourite. It’s refreshing and cleans your teeth.”

- PRAGMATIC FOODIE, YOUNG FAMILY

”



APPEARANCE IS MORE IMPORTANT FOR UNFAMILIAR VARIETIES

BUT IN GENERAL QUALITY APPLES ARE BRIGHT TO SIGNIFY BEING FRESH AND RIPE

3



“

“It looks friendly. The skin and the colouring of it is quite appealing. It’s got the pinkish red and you can see the seeds or dots on the outside which is nice to see. And it’s got little bits of green. Makes me think it’s going to be ripe, crispy and mature.”

- PRAGMATIC FOODIE, SINK/DINK

”

BRIGHT, NOT DULL

Bright colours are associated with health and ripeness. Dull, faded colours signify an apple that is a bit past its shelf life and potentially better for cooking with

STREAKS OF COLOUR

Pink or red apples with streaks of yellow or green appeal and create a sense of excitement. An apple that is too consistent in colour can look ‘too perfect’ or ‘fake’ for some

SPECKLED SKIN

Specks or dots (but not bumps) on the skin of an apple can signify that it is crispy and mature. While not an essential criteria, it alludes to positive taste characteristics

BUT DON'T JUDGE A BOOK BY ITS COVER

APPEARANCE DOESN'T ALWAYS EQUATE TO TASTE

People can have a great eating experience with an apple they wouldn't typically buy. Yet a lack of knowledge of the taste profile of less familiar varieties leads to assumptions based on the appearance alone. Upon reflection of the pre-task exercise, respondents were often surprised by apples they assumed wouldn't possess the desired taste qualities. The typical visual indicators of quality don't always equate to ideal taste and texture characteristics.

“

Now that I've tried the Modi, I actually really enjoyed it, but because of the colour I wouldn't have bought it. It looks too much like a Red Delicious, which are just not for me.”

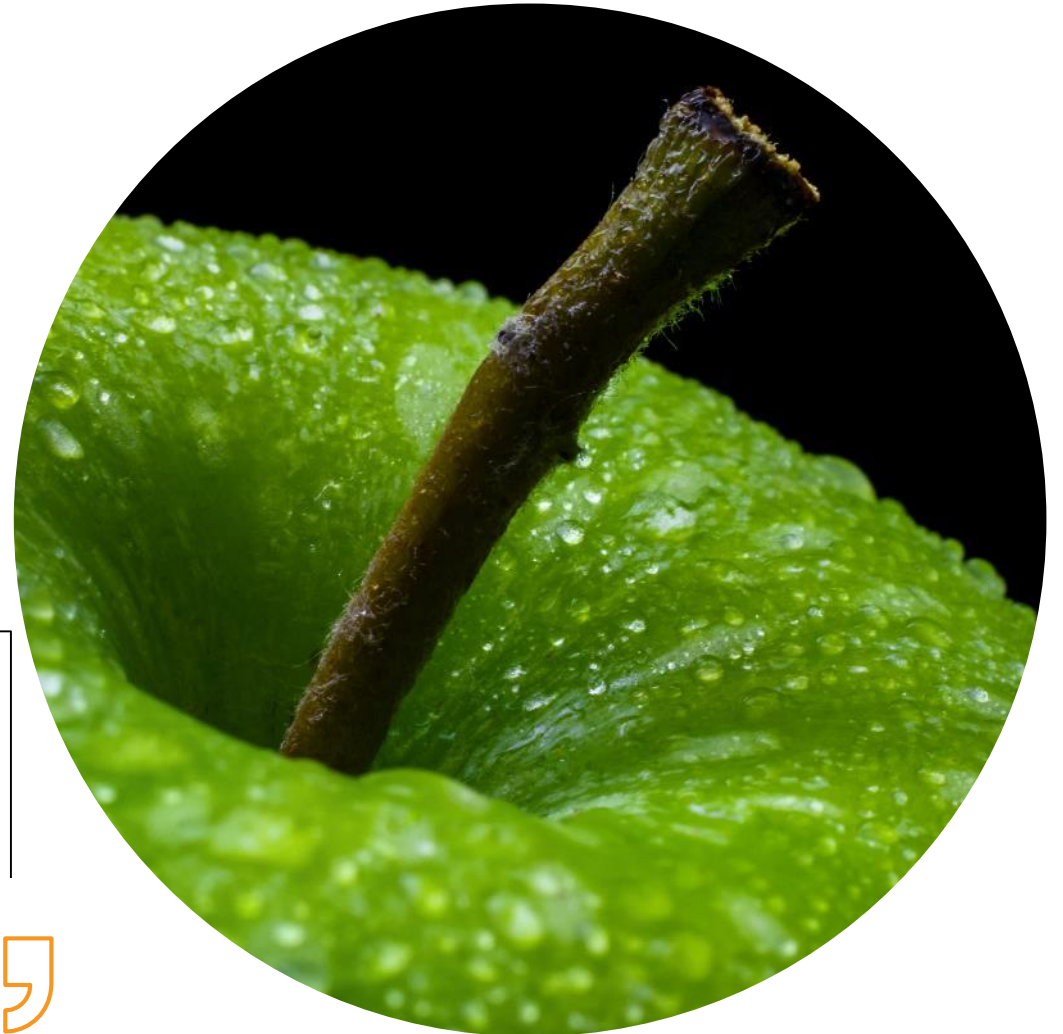
- SWEET-TOOTH FOODIE, SINK/DINK

“

“You just get used to eating a certain type. Some of them are not the prettiest looking apples but now that I've tried them, they definitely hit the brief in what I'm looking for in an apple.”

- PRAGMATIC FOODIE, YOUNG FAMILY

”



SMALLER TO MEDIUM APPLES APPEAL BROADLY FOR SNACKING

THEY'RE NOT JUST FOR FAMILIES

4

MESS-FREE, CRISPY AND FLAVOURSOME

There is an expectation that a smaller to medium sized apple is more likely to be crunchy and juicy, but without creating a mess when eating.

“You don’t want to get the messy hand. I just want to be able to eat an apple at work and get on with my day”

- PRAGMATIC FOODIE

IDEAL FOR PORTION CONTROL

Particularly for females, a large apple can be considered a burden to finish. Smaller-medium apples represent an ideal snack size.

“This looks like the best one. The size is right. It needs to bit into the palm of my hand. I feel like it’s a good size for me, I can confidently finish it.”

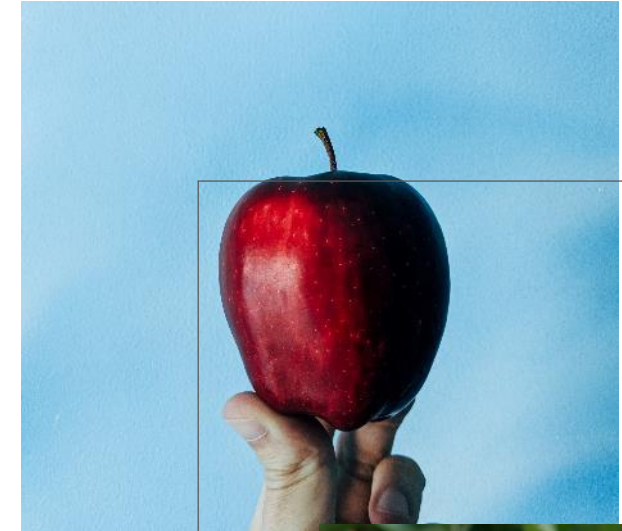
- SWEET TOOTH FOODIE

FIT IN LUNCH BOXES (FOR GROWN UPS TOO!)

Apples on the smaller size are easier to consume on-the-go or at work, dialling up the inherent rational benefits of why apples appeal in the first place: they are easy to transport.

“It just makes sense. You can throw it in your bag or lunch box and go. Easy.”

- PRAGMATIC FOODIE





SECTION 5

CATEGORISATION & TIERING

THE CONCEPT OF TIERING IS FAMILIAR AND PEOPLE RECOGNISE THAT IT HELPS THEM MAKE BETTER DECISIONS



AVOCADOS

- A simple but logical way to group the same variety, guiding decision-making dependent on the time lapsed between purchase and intended consumption



POTATOES

- Anchored in the usage occasion, descriptions guide decision making on the variety based on the intended use



OLIVE OIL

- Oil droplets indicative of the intensity of flavour guide shoppers based on taste preferences and have the intended occasion in mind



WINE

- A continuum from sweet – dry to help shoppers select based on taste preferences in a category that has a vast selection of varieties to choose from

TASTE WAS THE DOMINANT WAY CONSUMERS CATEGORISED APPLES

NO OTHER GROUPING WAS AS INSTINCTIVE AS TASTE

Grouping by taste is **meaningful** and **important** to consumers



Given the utmost importance placed on taste, it's unsurprising that all respondents called upon taste characterisation spontaneously. It is the most meaningful strategy to group apple varieties

Grouping by taste is **easy to understand**



Grouping apples by taste is easy to understand and helps shoppers compare and contrast varieties based on taste profiles. It is a simple and effective way to learn about unfamiliar varieties

Taste profiles act as a gateway to identifying **occasion usage**



By identifying the taste profile, for some respondents this sparked further thought on the type of occasion it could be used for. For example, Granny Smith apples are best for baking due to its tart flavour



"Supermarkets should say stuff like 'extra sweet', or 'super crispy, similar to a Fuji'. If they said something like 'if you like Fuji apples, you'll love this too...' I'd probably keep it in mind and try it."

- PRAGMATIC FOODIE, SINK/DINK



SOME CALLED FOR A 'CRUNCH INDEX'

GIVEN THE IMPORTANCE OF CRUNCH,
PEOPLE WANT THIS TO BE HEROED



IT'S IMPORTANT TO HIGHLIGHT IF APPLES ARE PARTICULARLY CRUNCHY

Crunchy apples (regardless of taste profile) are considered the hallmark of a quality apple.

Some respondents called for a group of 'super crunchy' apples to highlight texture qualities. While this didn't prevail as a superior characterisation method, it was considered enticing to hero apples that were particularly crunchy e.g., using a 'crunch' symbol or just text.



"I feel like me and other people in life would like a 'crisp index'. If you can guarantee the crunch... I have no idea if that correlates with freshness, or within the variety of apples. Plus if there was a way to see which ones are sweet, or which ones have the sweet and sour dimension, that would be useful to me"

- SWEET-TOOTH FOODIE, YOUNG FAMILY





EVERY VARIETY CAN BE CONSIDERED PREMIUM

**'PREMIUM'
ISN'T
RESTRICTED TO
A VARIETY**

Premium apples can span across all varieties. There aren't specific varieties that are considered consistently premium or budget

**TEXTURE &
TASTE DETERMINE
QUALITY**

Quality indicators are driven by texture and taste, which can even vary within varieties

**PACKAGED
APPLES PERCEIVED
AS LOWER
QUALITY**

Loose apples are conventionally known to have the best appearance and fewer imperfections. Those who buy packaged apples generally place higher value on the convenience of being able to 'grab and go', but accept that they might be of lower quality

QUICK RE-CAP: WE'VE UNCOVERED THREE KEY LEARNINGS



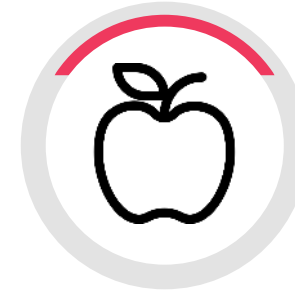
PEOPLE GENERALLY HAVE A GO-TO VARIETY

Loyalty to one or two apple varieties is common. Most people have a familiar, go-to variety that is consistent and reliable, it never lets them down



SHOPPERS ARE RISK AVERSE

Assumptions on the taste made based on the appearance alone results in risk aversion. The familiarity cycle is strengthened as shoppers fall back on familiar varieties to avoid an unpleasant eating experience



OCCASIONS BEYOND SNACKING AREN'T TOP OF MIND

Snacking is the dominant occasion in mind at point-of-purchase. Shoppers are thinking primarily about *eating* the apple, other occasions are a secondary thought and often occur after purchase



SECTION 6

RESPONSE TO THE STIMULUS

WE SHOWED RESPONDENTS A MOCK POP DISPLAY: OVERALL IT RESONATES WELL AND HELPS PEOPLE CHOOSE VARIETIES THEY ARE UNFAMILIAR WITH



Modi™

Medium sized with rich, dark red skin. Modi apples are known for their intense, sweet flavour and juiciness.



Pink Lady®

Large with a firm, sweet, crisp, juicy flesh. Excellent in salads, sauces and pies.



Fuji

This medium-sized apple is slightly sweeter than other varieties and is great in salads, pies, sauces. Can also be frozen.



Red Delicious

Sweet, highly aromatic with a creamy, white flesh. Popular in dessert dishes and great in salads.



Jazz™

Crunchy and effervescent, this small to medium apple has a tangy, sweet flavour.



Royal Gala

A dense, sweet, aromatic and juicy apple with a white flesh. Ideal for pies, sauces and salads.



Kanzi™

This bright red apple is large in size and has a unique sweet and tangy flavour.



Granny Smith

A hard apple with a crisp tart flavour perfect for baking, freezing, salads, sauces and pies.

THE SIGNAGE WAS CONSIDERED TO HELP SHOPPERS MAKE INFORMED DECISIONS, BUT THERE ARE AREAS THAT COULD BE OPTIMISED FURTHER

WHAT'S WORKING

- ✓ Consumers instinctively group apples based on personal taste preferences as a first port of call, so categorisation based on taste resonates and is important to consumers
- ✓ Taste characterisation is simple and easy to understand and helps shoppers make informed decisions
- ✓ Educates shoppers on unfamiliar varieties to allow them to compare and contrast taste profiles and encourages trial
- ✓ Taste descriptions act as a gateway to consideration of new apple occasions by triggering alternative ideas and uses
- ✓ Apple descriptions were credible, exciting, and attention-grabbing



"I would buy this apple again now that I know the taste but without any descriptions, I would never have picked this up in store. With something like this it teaches you what other apples you might like and helps you avoid what you don't, so I don't waste my time."

- PRAGMATIC FOODIE, YOUNG FAMILY



WATCH-OUTS

- ✗ Most found it difficult to articulate varieties in the '**medium**' bucket:
 - There is an expectation that varieties in the same bucket will taste similar, but it was jarring when varieties in the same bucket were considered to taste vastly different e.g. Red Delicious and Kanzi
 - No existing bucket caters to apples that possess multiple taste dimensions e.g. both sweet and tangy
 - 'Medium' has inherent connotations to the size of the apple rather than taste



"When I think of 'medium' I think of size. It doesn't really go well with 'sweet' and 'tart'."

- SWEET TOOTH FOODIE, SINK/DINK

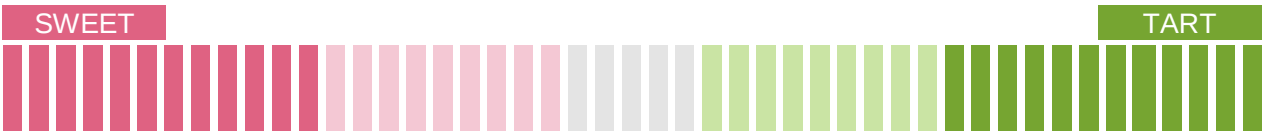


IDEAS FOR ALTERNATIVE APPROACHES

RESPONDENTS WENT IN ONE OF TWO DIRECTIONS:
MAKE IT SIMPLER, OR ADD MORE DETAIL

1

CONTINUOUS SCALE



2

FURTHER DEFINED CATEGORIES



PROS

- ✓ Simplifies a sometimes complex category
- ✓ Easy to understand

CONS

- ✗ Apples in the centre are less differentiated
- ✗ Doesn't have sensitivity to indicate multi-dimensional tastes e.g. both sweet *and* tart

PROS

- ✓ Clearly defined taste profiles for each bucket
- ✓ Pulls apart 'sweet' further, catering to different variations of a sweet taste profile
- ✓ Avoids resistance to purchase apples visually resembling disapproved varieties

CONS

- ✗ Potential for perceived greater complexity



SECTION 7

THE LAST 5 MINUTES



THE LAST FIVE MINUTES

KEY FINDINGS

ONE

APPLE SHOPPING IS EASY

It is important to realise that there are **no significant pain points** in the apple purchase journey. Apple purchasing is seen as easy given **high inertia** and **loyalty** towards a **1-2 varieties**.

This means that any **changes** to the **customer journey** should be **step changes** and designed to **augment**, not replace existing components.

TWO

BUT RISK AVERSION IS HIGH

All the participants we spoke to **rarely tried varieties** beyond their “go-to”. This was often due to **uncertainty** around the quality of other varieties and an **aversion to a poor experience**.

Despite strong **inertia**, many found they were **open to new varieties**. The task of tasting new apples also **encouraged** many to **consider new varieties** at their next shop.

THREE

QUALITY IS TASTE & TEXTURE

Consistent with the quantitative findings, we found that **taste** and **texture** were the dominant drivers of **perceived quality**. Taste was often measured in **sweetness** while texture was almost always described as **crunch**.

While **influential**, **provenance**, **size**, **shape**, and smell were much **less important** in determining a quality apple.

FOUR

CATEGORISING ON TASTE

When participants were asked to **categorise** apples, **taste** was the **dominant** driver. Most categorised on a simple taste **continuum: between sweet and tart**.

Participants found it **difficult** to categorise apples in **other ways** given they consider apple shopping to be **simple** and **non-problematic**.

FIVE

TIERING IS DIFFICULT

Participants found it **very difficult** to categorise apple varieties into **quality tiers**. There was recognition that **individual taste preferences** would **prevent** any one variety being **labelled as premium**.

Instead, **premium** apples were thought to be those of the highest quality **within a variety**, e.g. those that **looked good**, were **crunchy**, and **tasted good**.

HELPING CUSTOMERS MAKE DECISIONS CAN LEAD TO GROWTH

RECOMMENDATIONS FOR GROWTH

01

CATEGORISE APPLES
BASED ON SUPER-
SWEET, SWEET, TART,
AND FLORAL

Adopt a **simple categorisation** continuum based on **taste**. Not only does this **resonate with sweet-tooth foodies** but will help **familiarise** less salient varieties.

02

AVOID A “GOOD,
BETTER, BEST” TIERING
STRUCTURE BASED ON
VARIETIES

A tiering structure that prioritise some varieties as better than others **lacks credibility**. Instead, **promoting better looking or fresher apples** as premium is more credible **but may detract** from lower tiers.

03

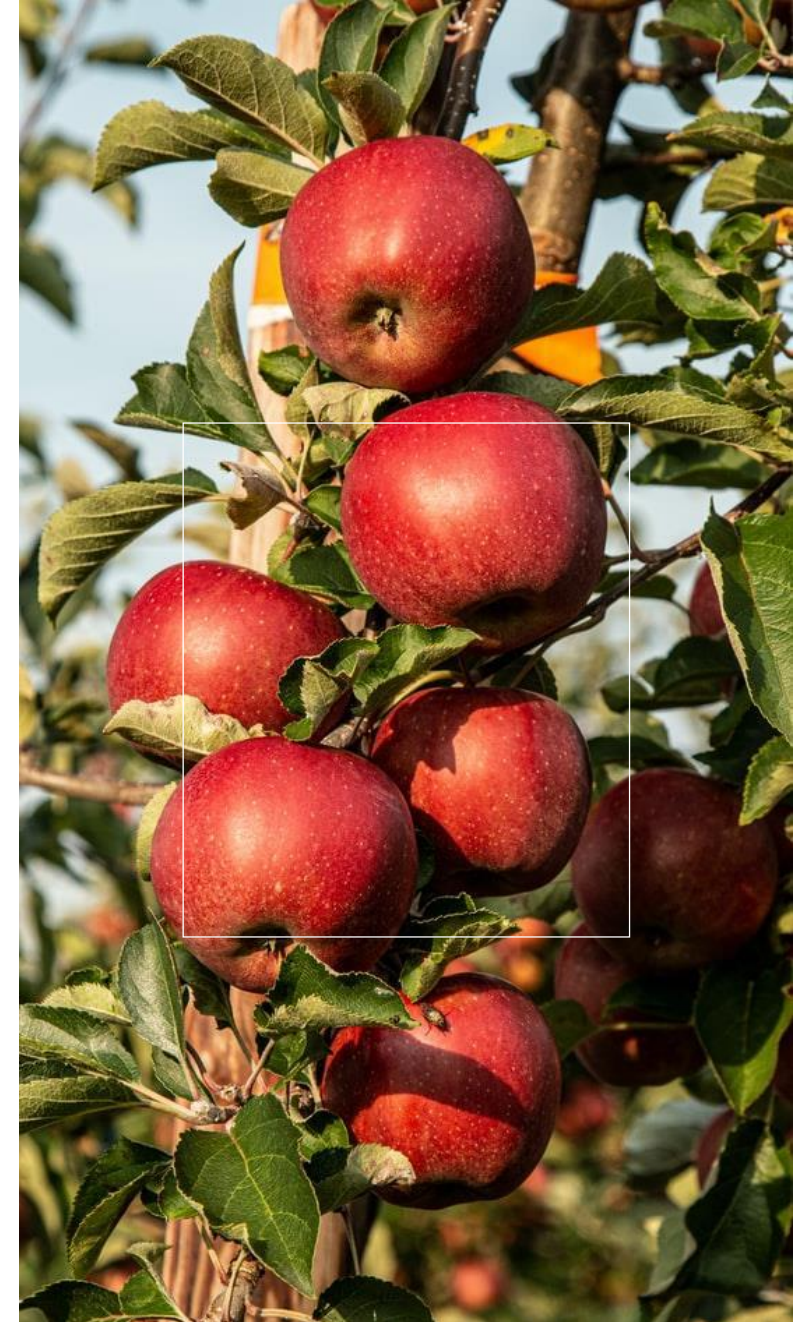
CHARGE PRICE
PREMIUMS ON
VARIETIES THAT OFFER
CONSISTENT CRUNCH

Crunch is a **important** theme throughout qualitative and quantitative data. We do not necessarily recommend revisiting the “Get Your Crunch On” campaign, but it is one **tangible objective feature** that customers will **pay more** for.

04

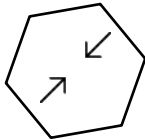
COMMS SHOULD CALL
OUT UNIQUENESS,
TASTE QUALITIES, AND
OCCASIONS

Use terms that give **subtle references** that allude to a new or **interesting flavours**. Foodie segments are more likely to resonate with terms like “**unique**” and “**aromatic**”. They also appreciated **guidance on new occasions**, e.g. salads.



BEHAVIOURAL ECONOMICS CAN HELP US OPTIMISE HOW WE DRIVE GROWTH...

LEVERAGING BEHAVIOURAL ECONOMICS

					
BEHAVIOURAL BIAS	Anchoring: Consumers are over-reliant on one piece of information when making new or unfamiliar decisions ▼	Bandwagoning: Messages become more credible if they are adopted by more people ▼	Compromising: Consumers tend to pick the “middle” option when uncertain about decisions ▼	Risk Compensation: People will be more careful if they feel risk of a poor outcome is greater ▼	Serial Positioning: How you order information has a big influence on how it is decoded ▼
IMPLICATION	As most have a “go-to” variety, comparing club varieties to more well-known, popular varieties (e.g. Pink Lady) will decrease perceived risk and encourage trial. For example, “similar to a Pink Lady”	Calling out varieties as new or increasingly popular (whether at point-of-sale or in other communications) will decrease perceived risk and encourage trial. For example, “the most popular variety this summer”	The positioning of different varieties on the scale is important. Apples found in the centre of a “sweetness” scale may attract more interest as some may wish to avoid overly sweet or tart / floral varieties	Pre-packaging popular varieties, e.g. Pink Lady, Royal Gala, Fuji, with less salient / popular varieties, e.g. Jazz, Kanzi, may encourage trial as risk is mitigated. Highlighting that pre-packs contain “favourites” is important	The first and last pieces of information are critical. Starting with key taste descriptors and ending with occasions are likely to spark intrigue while also inspiring different uses.



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