

**Hort
Innovation**
Strategic levy investment

 **edentify**

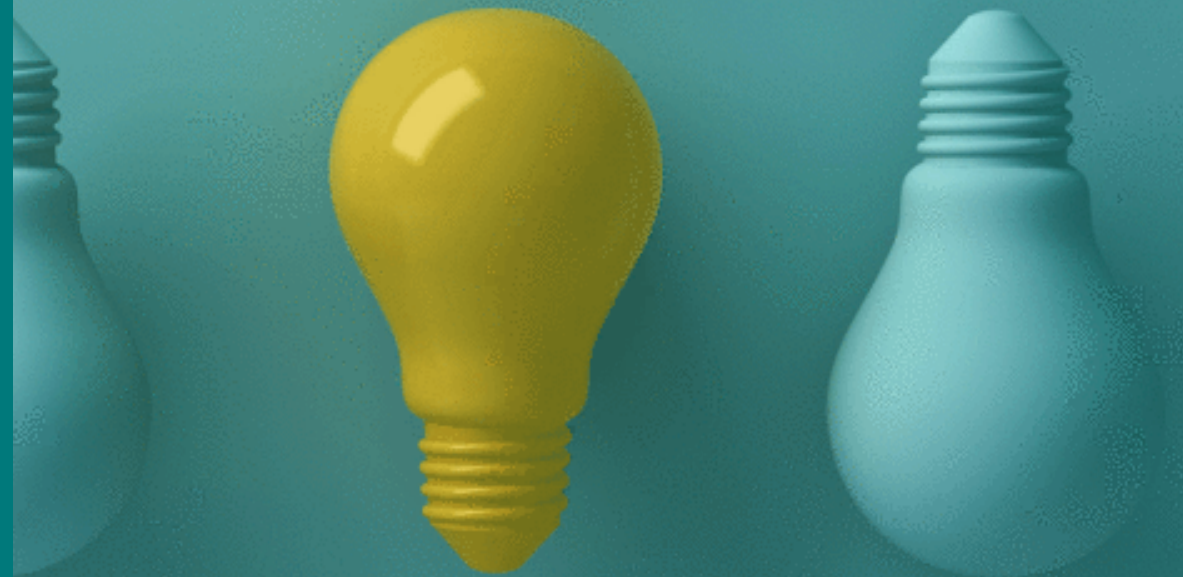
BANANA FUND

BANANA CONSUMER TRACKING
SEPTEMBER/OCTOBER 2021



RESEARCH OBJECTIVES – Sep/Oct 21

- **Measure overall attitudes towards bananas;** tracking awareness, quality and taste expectations, perception statements and the health benefits that influence consumer behaviour.
- **Measure online purchase behaviour and satisfaction**
- **Track tagline effectiveness;** tagline 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** with a focus on the breakfast period



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

Sep 20 wave: 23rd – 25th September 2020
Oct 20 wave: 12th – 16th October 2020

Dec 20 wave: 14th – 20th December 2020
Feb 21 wave: 2nd – 5th February 2021

Apr 21 wave: 6th – 10th April 2021
Jun 21 wave: 27th - 31st May 2021

Sep 21 wave: 14th – 17th September 2021
Oct 21 wave: 27th Sept – 1st October 2021



Agenda

SECTION 1

**The snacking
category**

SECTION 2

**Purchase
behaviour**

SECTION 3

**Attitudes
towards
bananas**

SECTION 4

**Consumption
and usage
habits**

SECTION 5

**Tagline
effectiveness**

SECTION 1

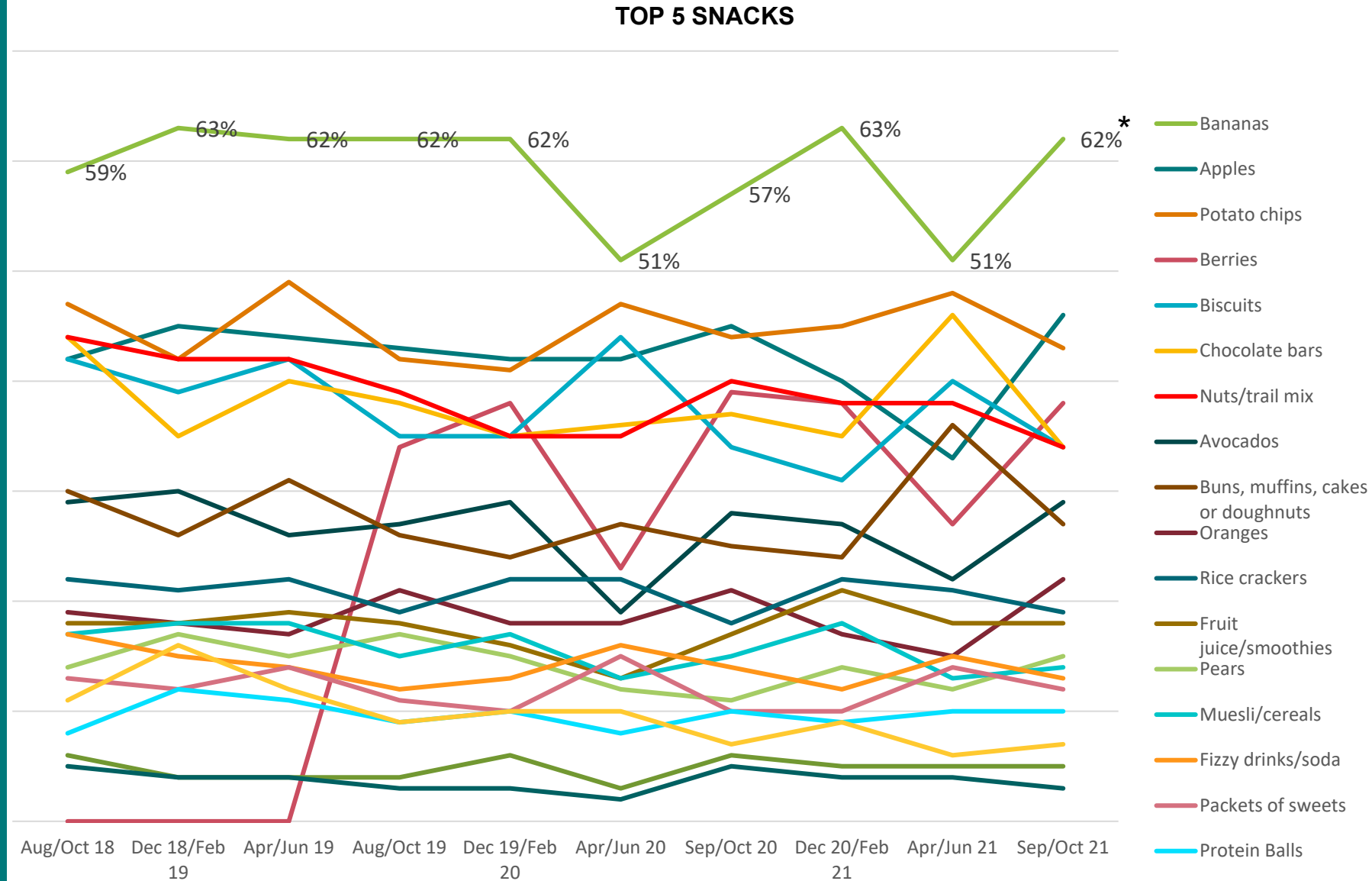
The snacking category



Bananas have reached the same level as previously seen in Dec 20/Feb 21.

There has been a recovery for the fruits: **bananas, apples, avocados** and **berries** in the top 5 snack category.

This recovery coincides with a drop for packaged snacks such as **potato chips, buns, and biscuits.**



* Significant differences in bananas versus previous wave, at 95% confidence level

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

A bit of context:

September has seen blueberries and avocados experience a boom in supply.

Blueberries and strawberries in battle for Australia's most valuable berry crop

27th Sep 2021 – [abc.net.au](https://www.abc.net.au)



Avoiding an 'avocado situation'

Blueberries are not Australia's only booming fruit crop.

The popularity of avocados has soared on the back of the same healthy-eating trends that have fed blueberries' rise.

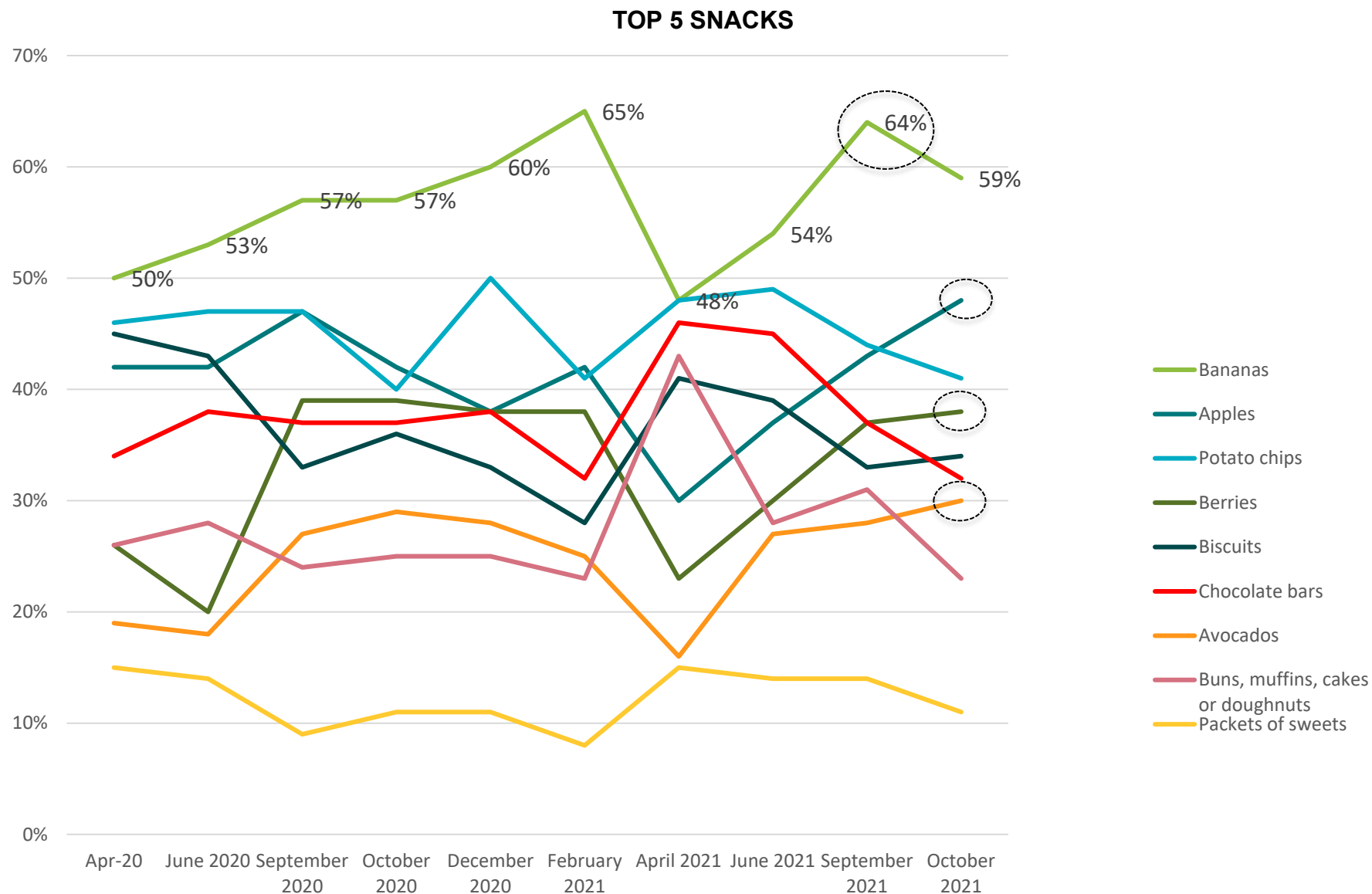
But this year avocado prices have been depressed as a strong season coincided with many newly planted trees reaching maturity.

27th Sep 2021 – [abc.net.au](https://www.abc.net.au)



Bananas saw a significant increase from June to September and have maintained its position at the top of the snacking category in October at 59%.

The other fruits have shown slight increases from September to October.



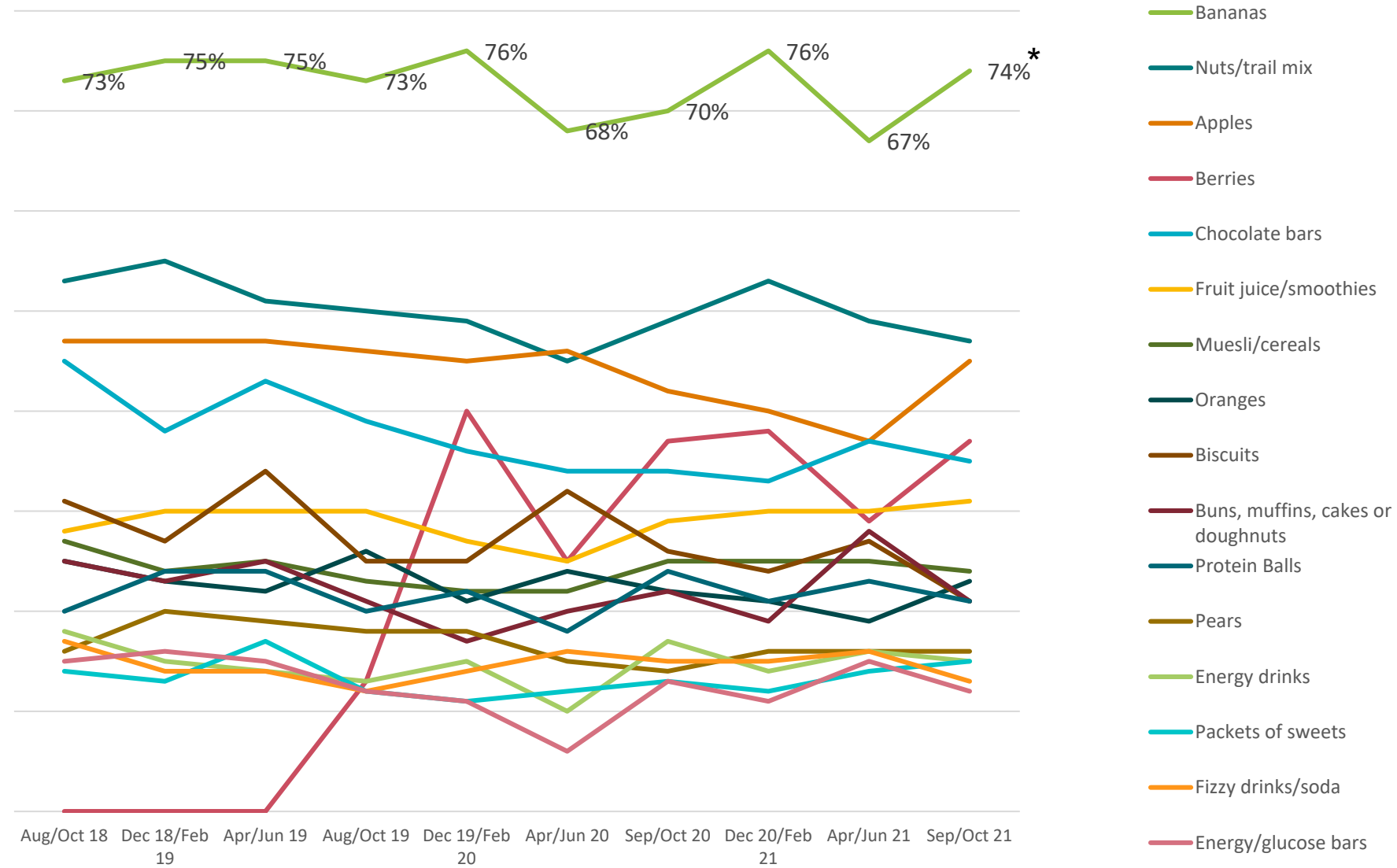
* Significant differences in bananas versus previous wave, at 95% confidence level

Q1. Please select your top 5 snacks from the following list. Base: Total each mid-wave n=300

Banana as a top energy snack has jumped back up to heights previously experienced in Dec 20/Feb 21.

This has reinforced **bananas** position as the clear #1 favourite energy snack.

TOP 5 ENERGY SNACKS



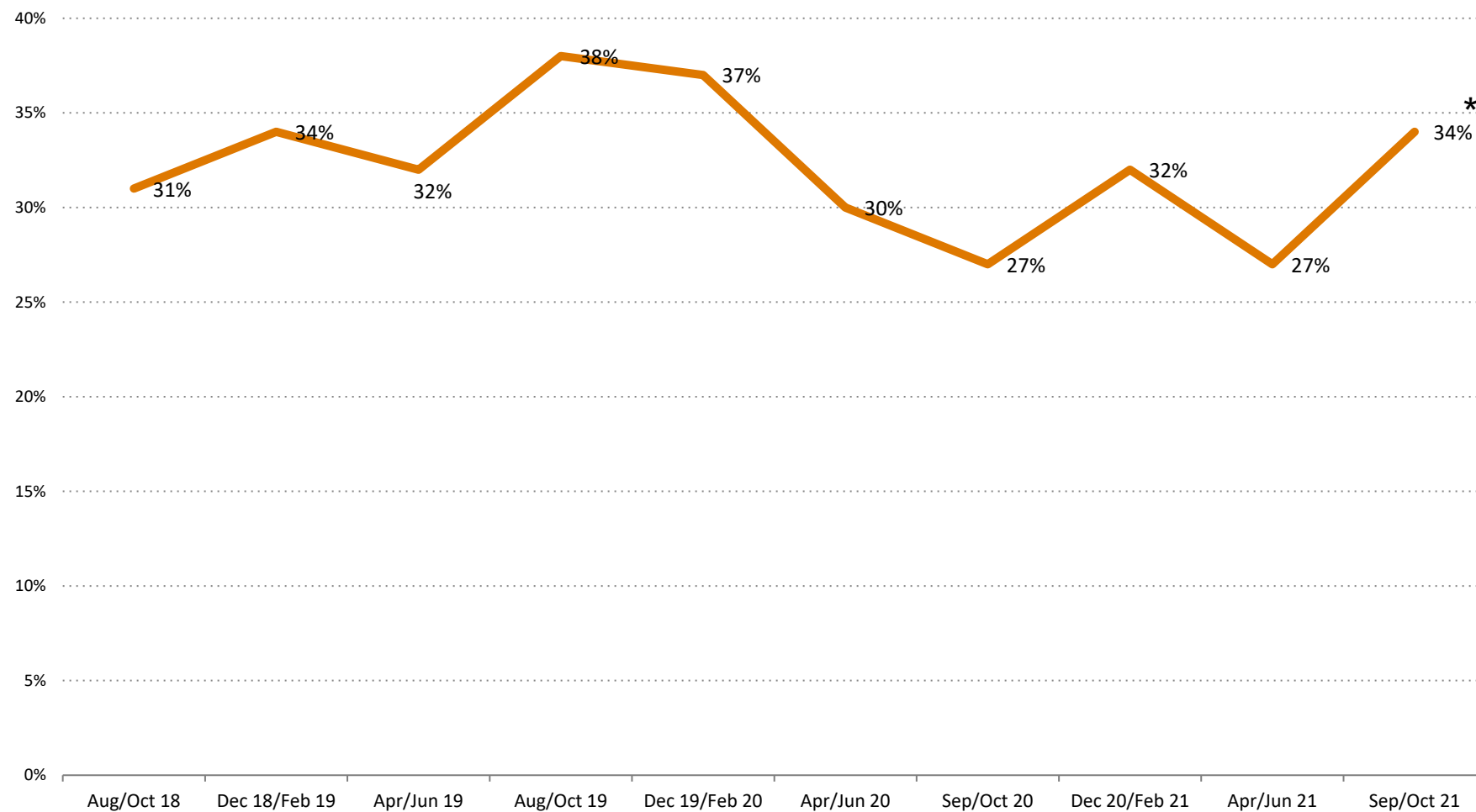
* Significant differences in bananas versus previous wave, at 95% confidence level

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

34% of grocery buyers ranked **bananas** as their #1 favourite energy snack.

This is a significant recovery from April/June (27%).

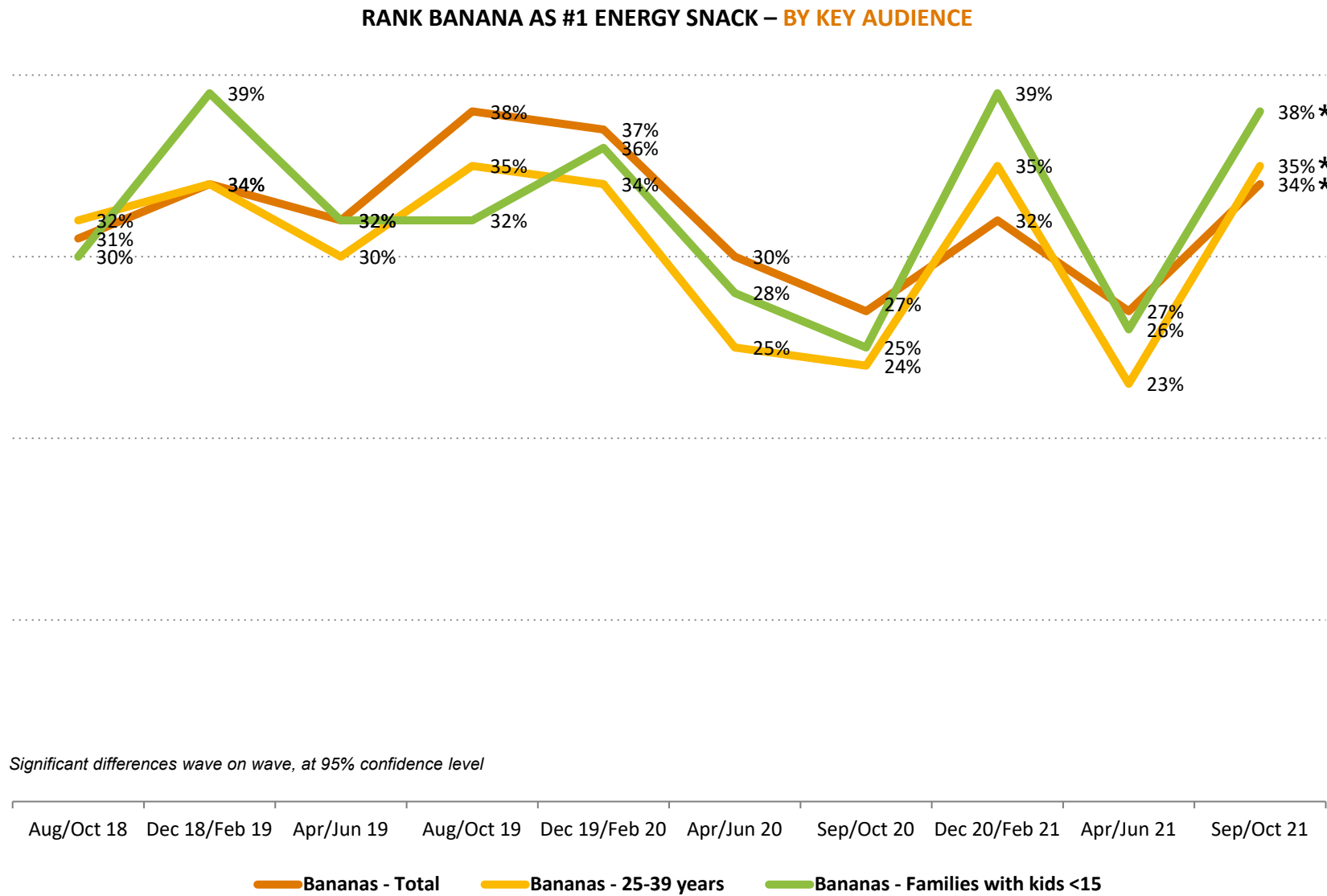
RANK BANANA AS #1 ENERGY SNACK



* 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

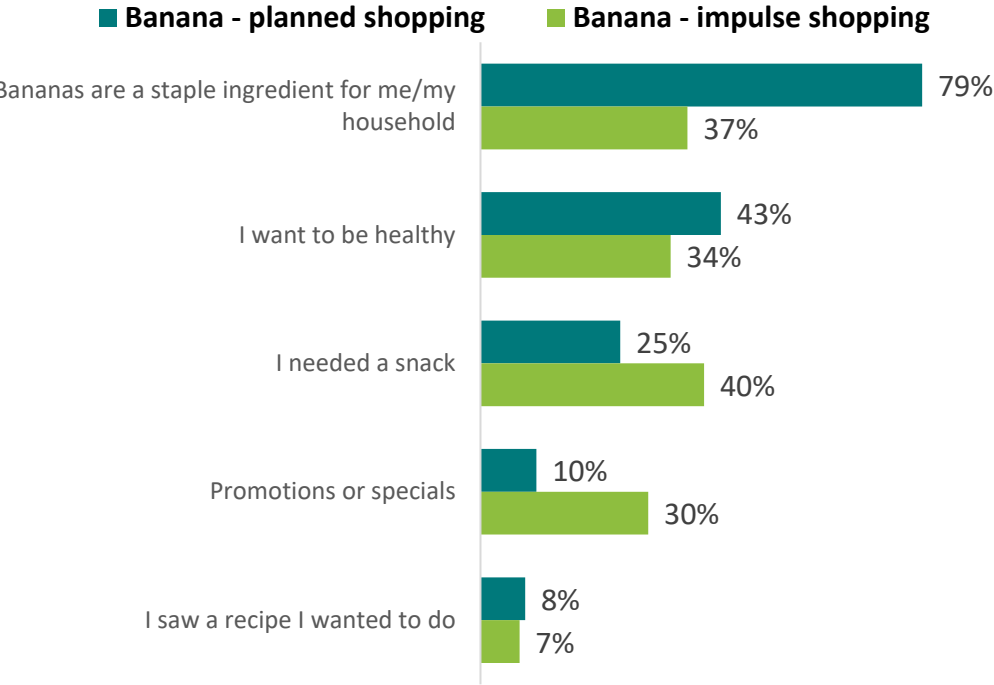
The recovery of bananas in the energy snacks category since April/June 21 is primarily driven by the 25-39 year old group.



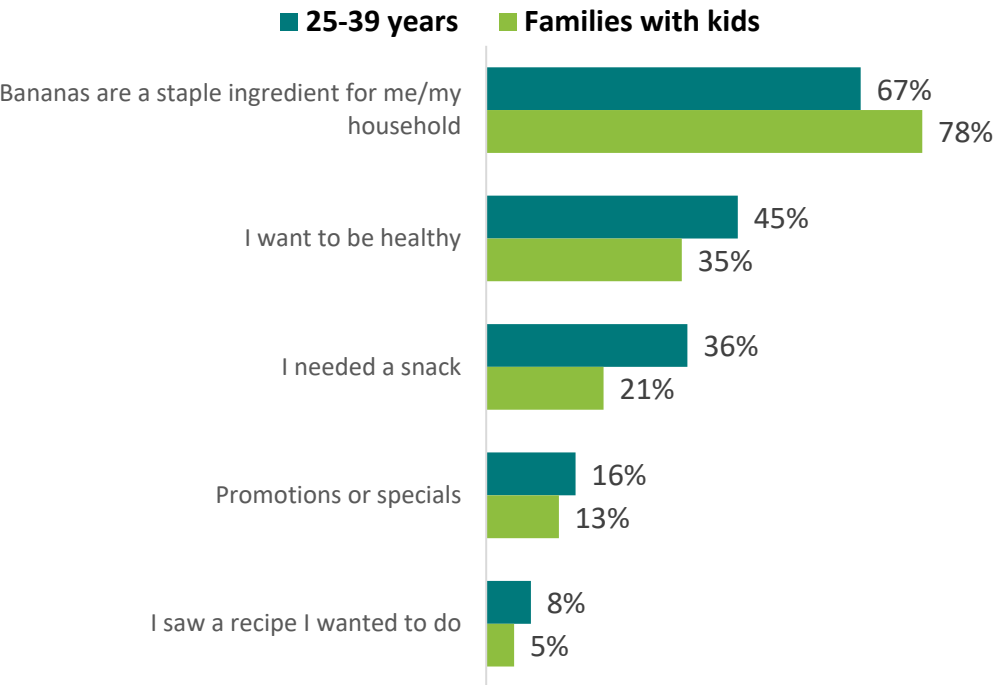
Q1a. Please select your top 5 preferred energy snacks from the following list. Base: Total for each wave n=600; in Sep/Oct 21 25-39 years old n=166; Families with children <15 n=124

Bananas are a widely seen as a staple ingredient across both key audiences

PROMPTED TRIGGERS TO LATEST BANANA PURCHASE
PLANNED VS IMPULSE SHOPPERS



PROMPTED TRIGGERS TO LATEST BANANA PURCHASE
BY KEY AUDIENCE

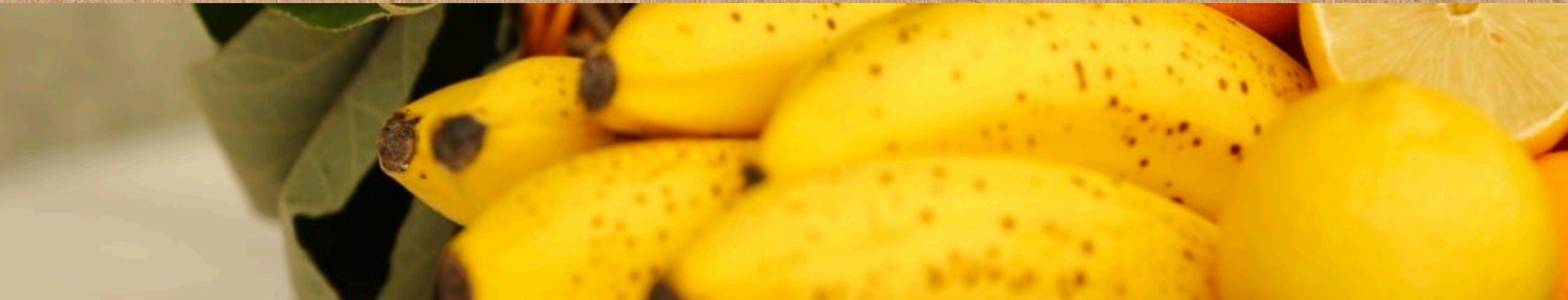


Prompt Which of the following best describes what prompted you to buy bananas in the last 2 weeks Base in Sep/Oct 21 25-39 years old n=166; Families with children <15 n=124

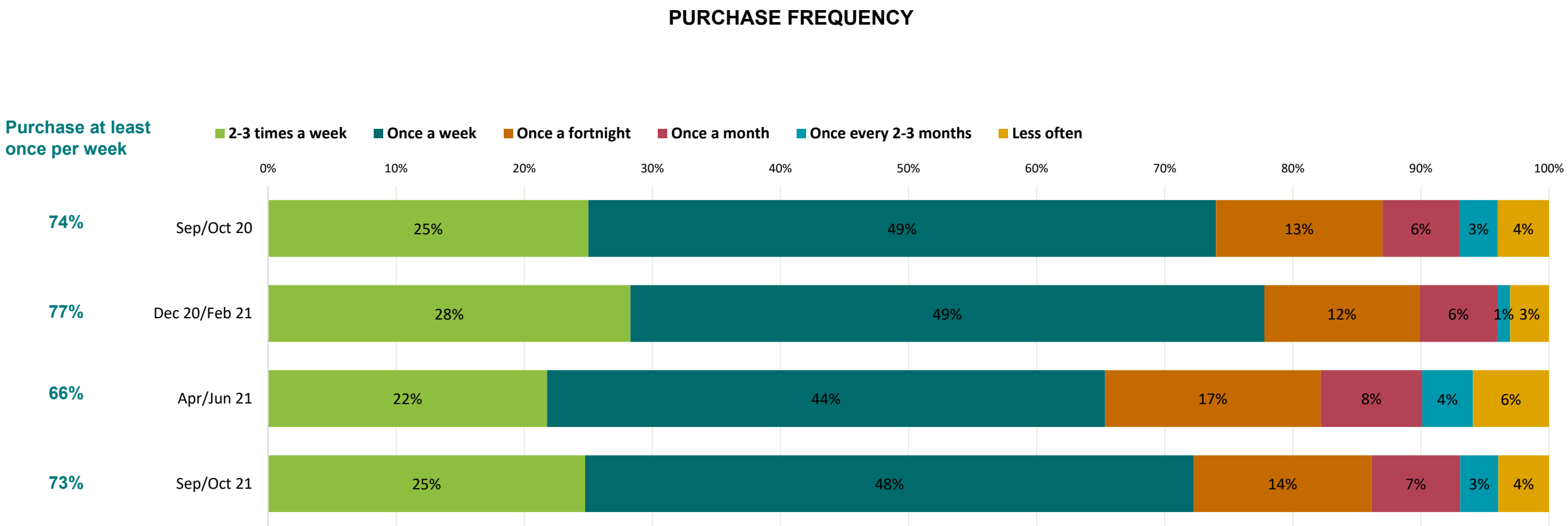
After a difficult period for bananas in April/June due to large crop damages, **September and October have shown a significant recovery for bananas in the energy snack category,** consolidating its leading position heading towards the Summer months.

SECTION 2

Shopping behaviour

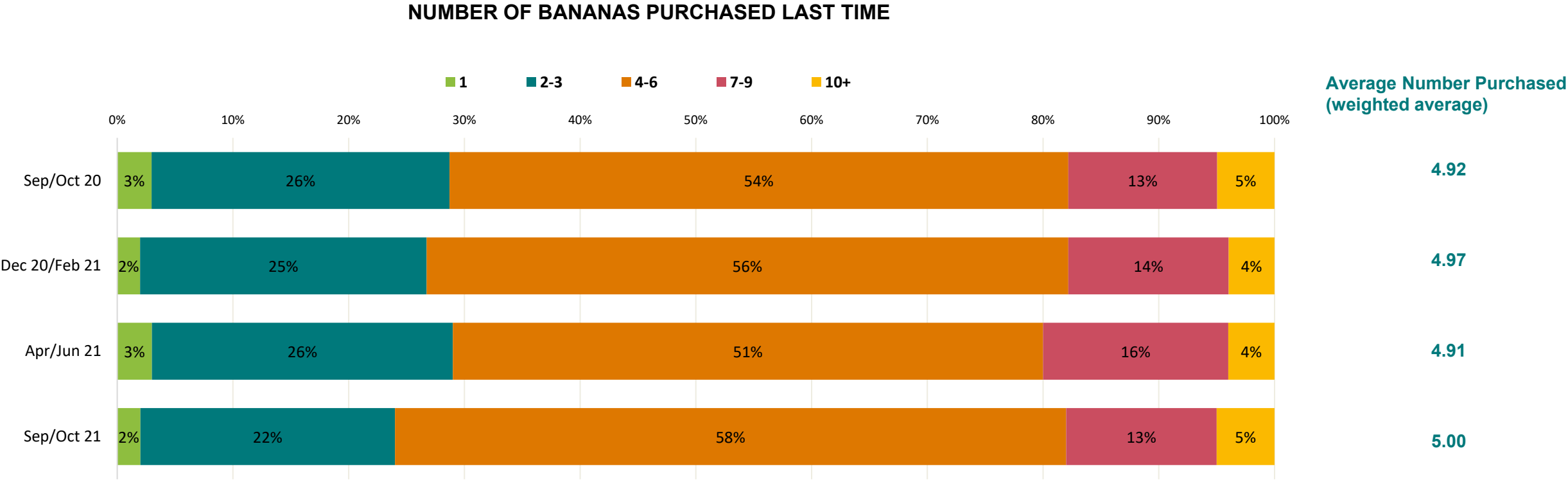


Shopping for bananas has become more frequent since dropping in April/June



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

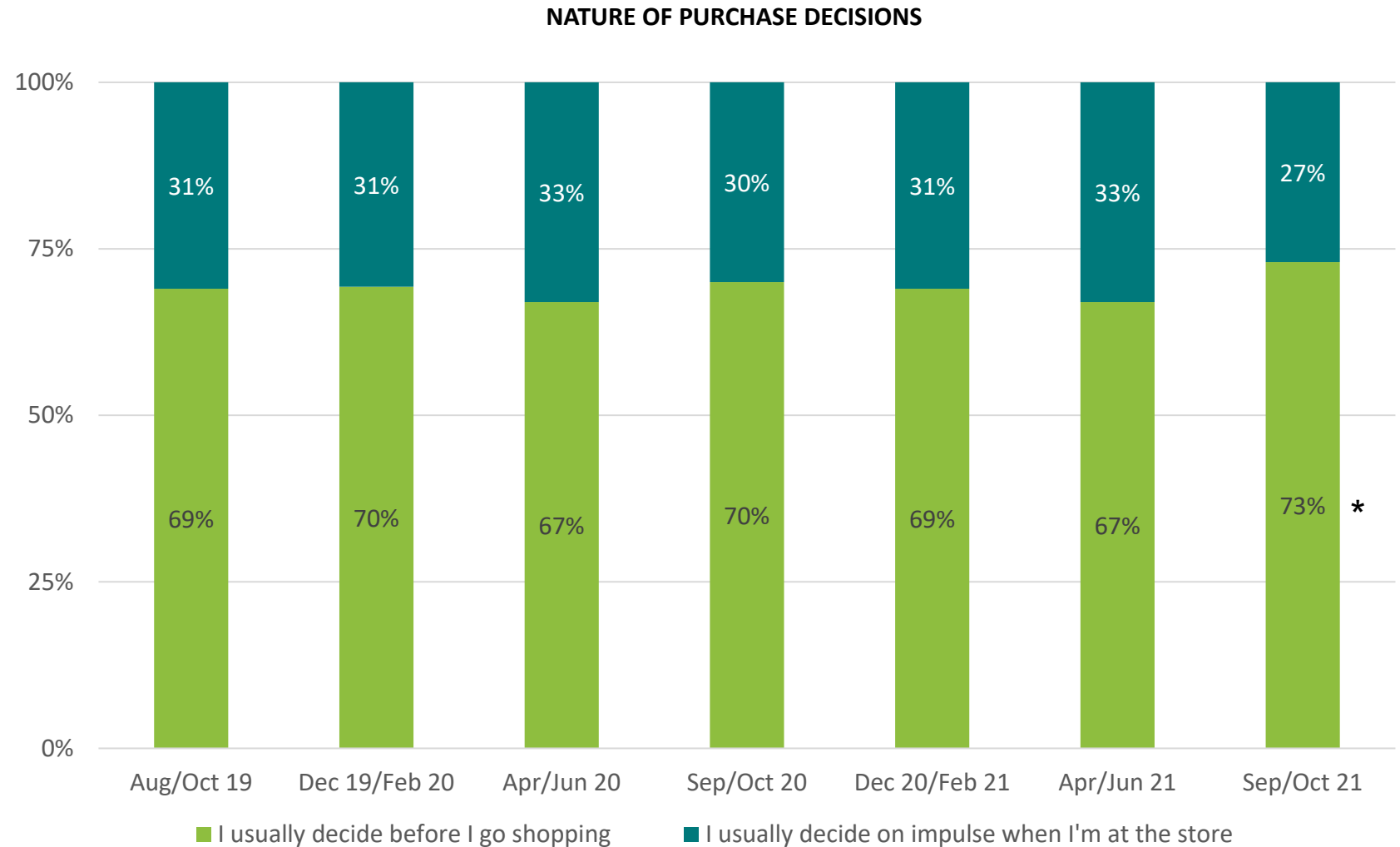
Numbers of bananas purchased has slightly increased



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

Bananas remain a largely pre-planned purchase.

This is especially the case for **Sep/Oct 21** which has seen a significant increase to pre-planned purchases.

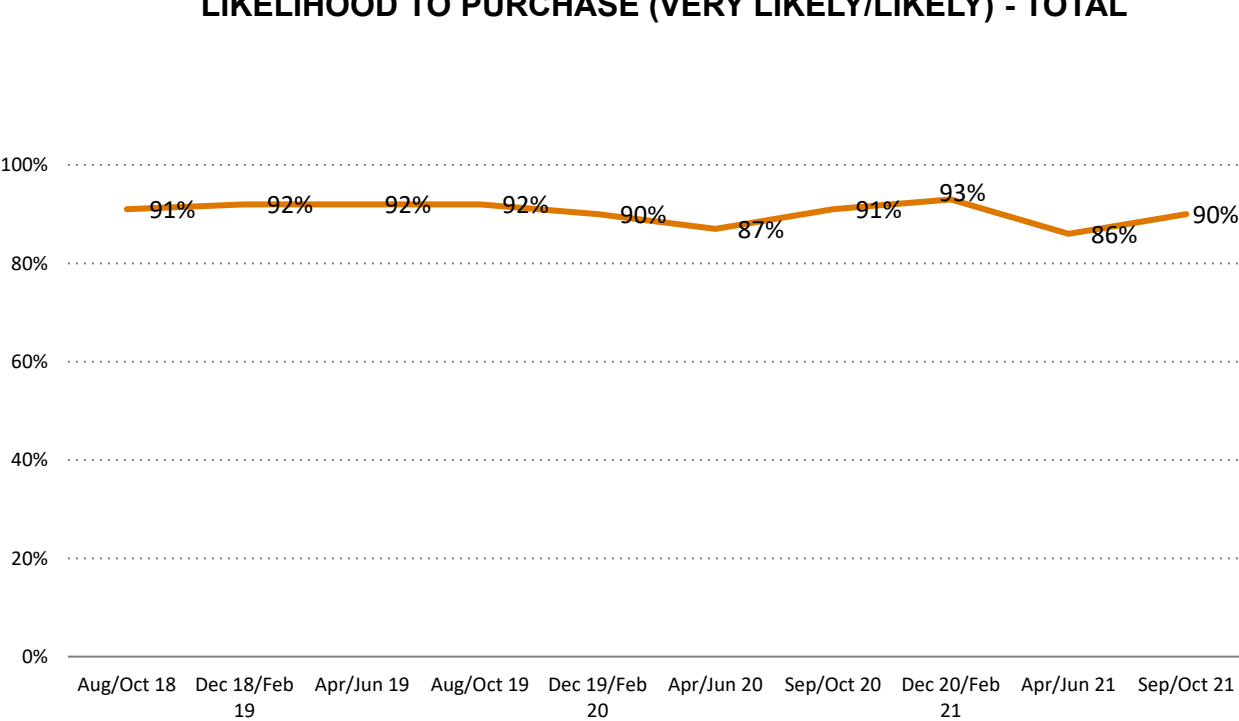


* Significant differences in bananas versus previous wave, at 95% confidence level

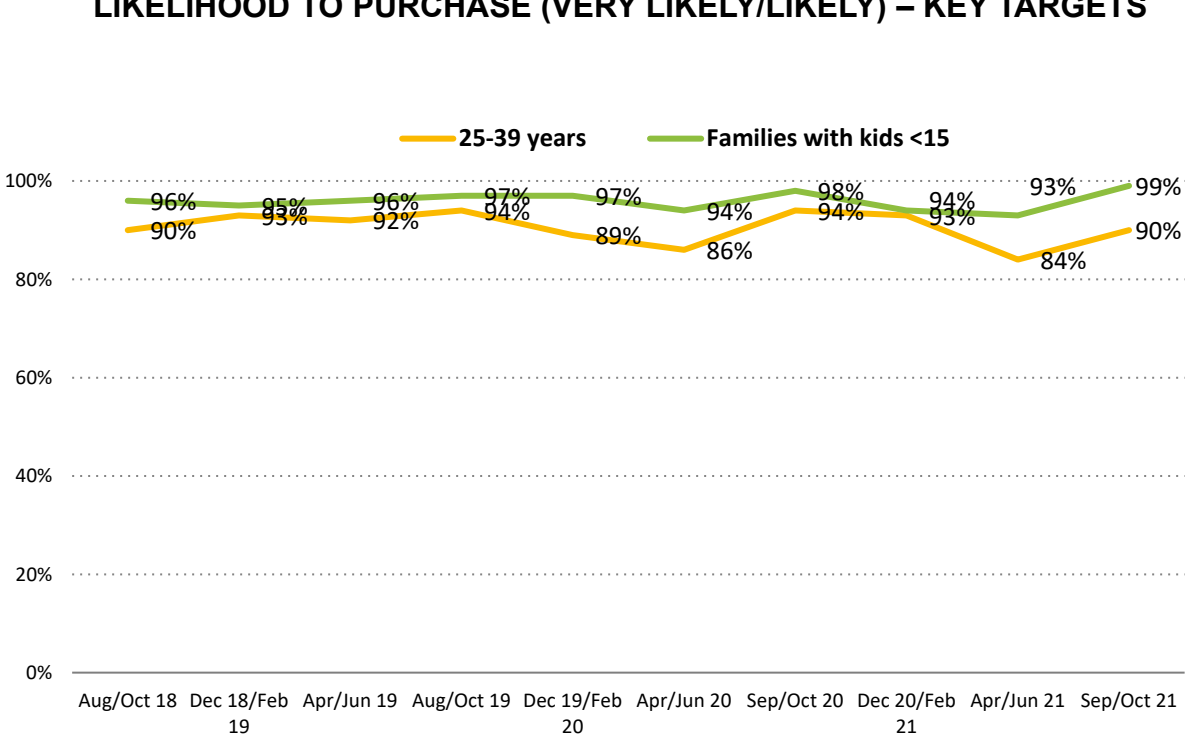
Q4. Which one of these best describes when you usually decide to buy bananas? Base: Total n=600 each wave

Purchase intentions remain extremely high, with an increase driven by Families with kids under 15.

LIKELIHOOD TO PURCHASE (VERY LIKELY/LIKELY) - TOTAL

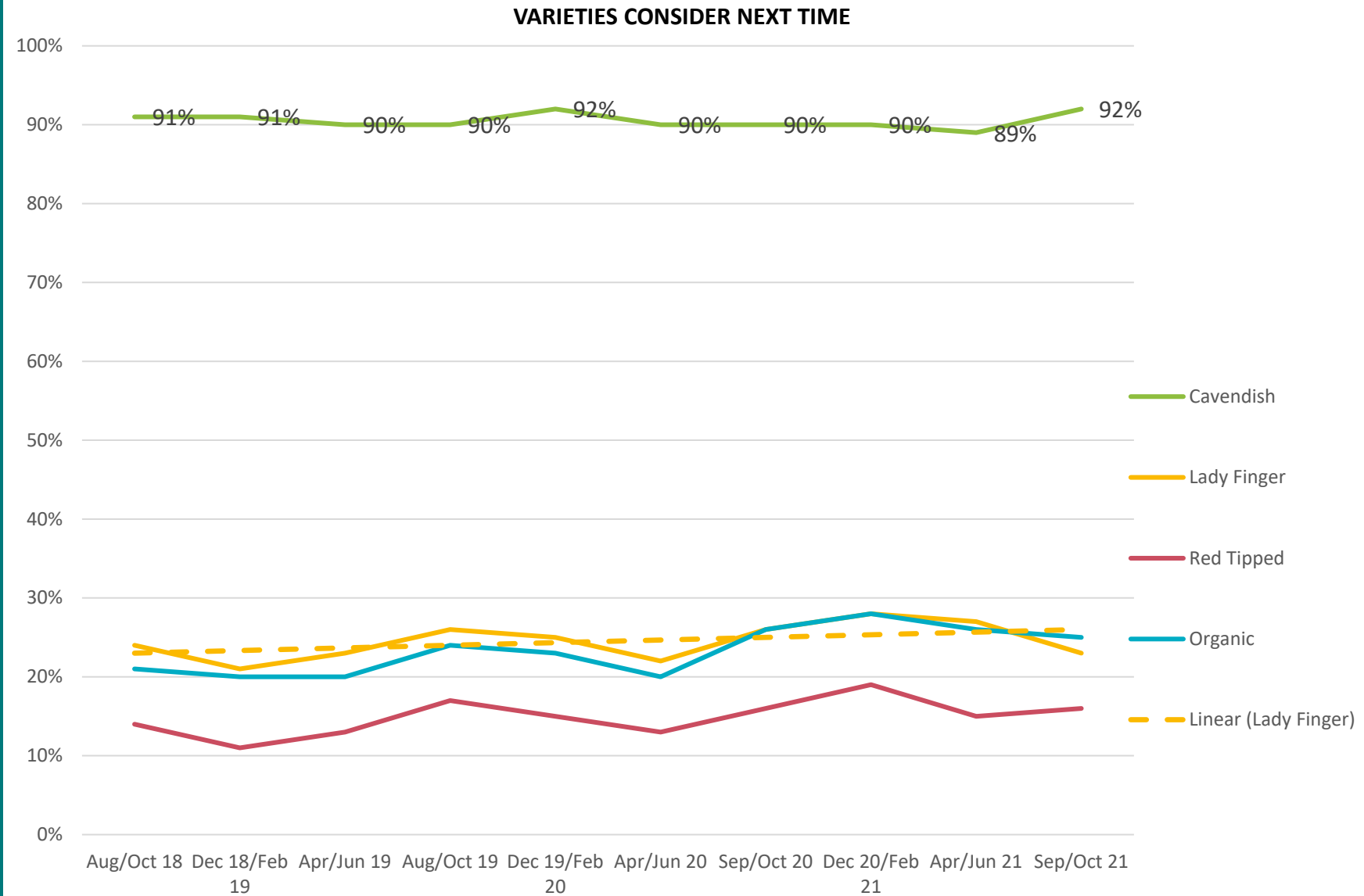


LIKELIHOOD TO PURCHASE (VERY LIKELY/LIKELY) – KEY TARGETS



Q5. How likely are you to purchase a banana for household consumption in the next 2 weeks? Total n=600 each wave, in Apr/Jun 21 20 25-39 years old n=166; Families with children <15 n=124

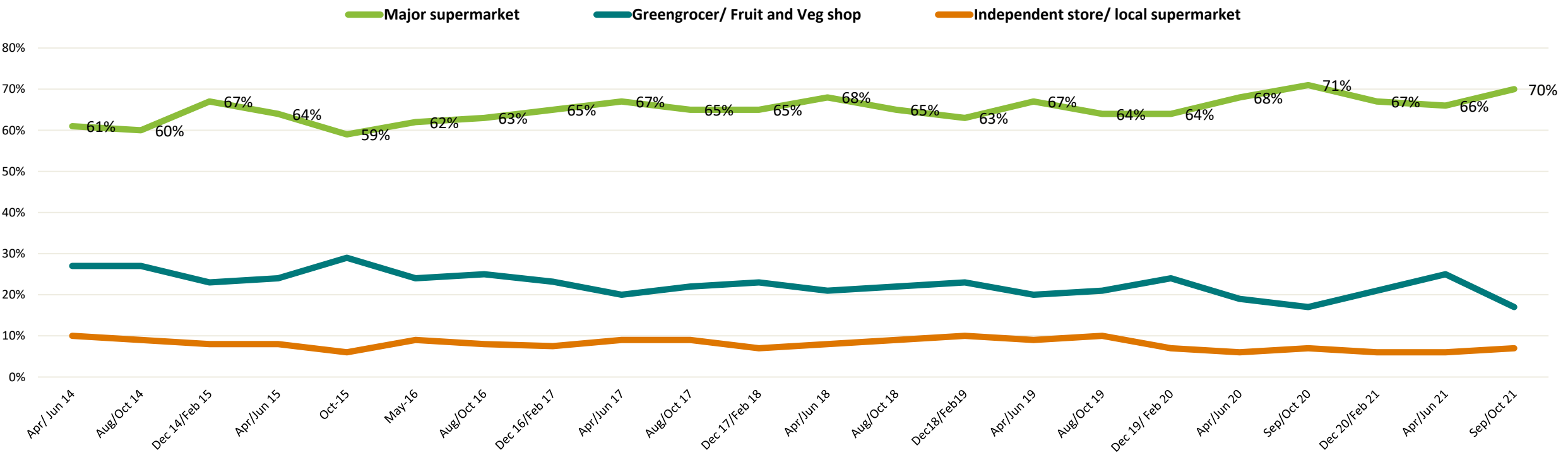
The **Cavendish** variety is the most obvious one in shoppers' mind.



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;

Major supermarkets continue to dominate the main place of purchase for bananas.

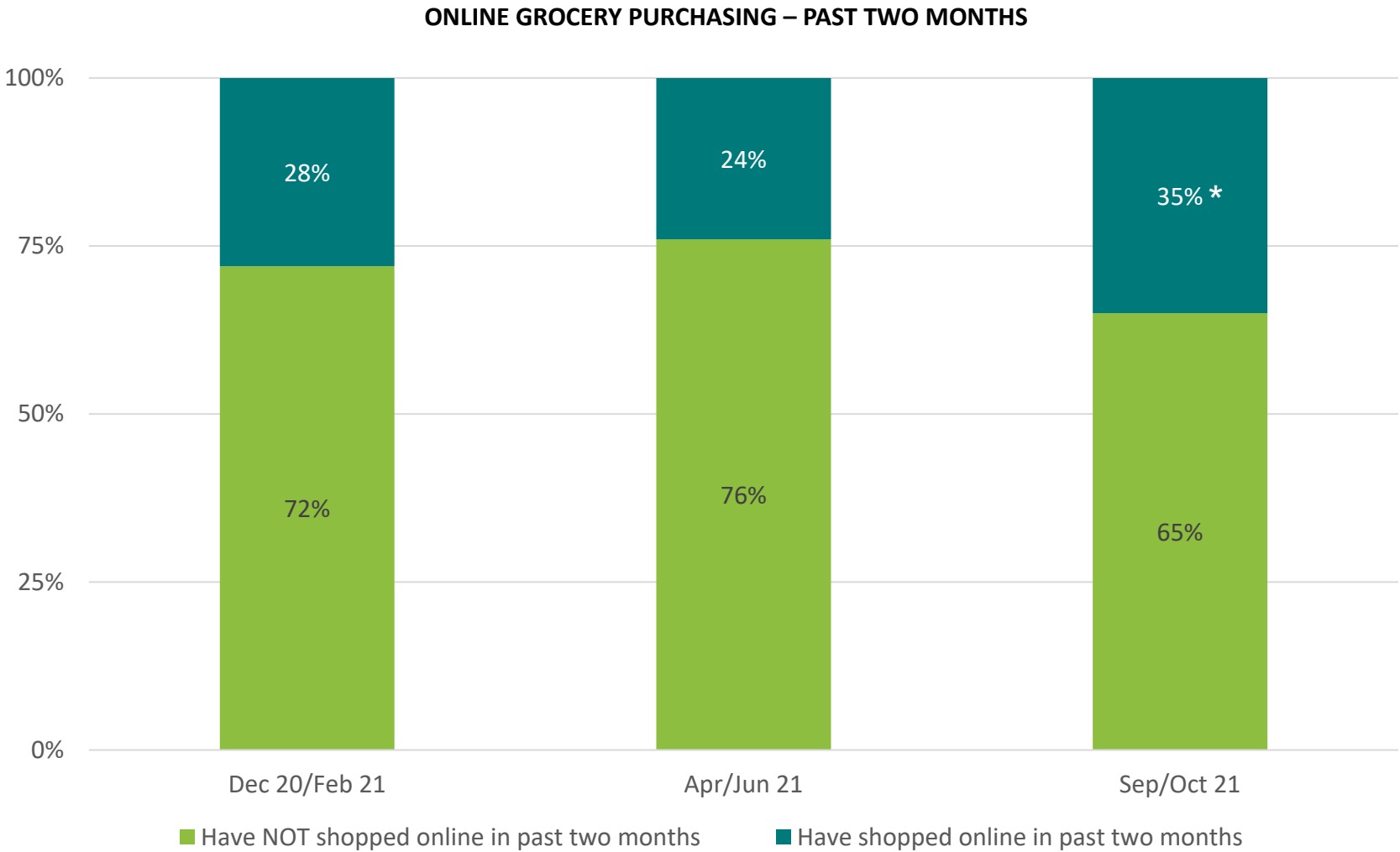
MAIN PLACE OF PURCHASE



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

September/October has seen a significant increase in online grocery purchases.

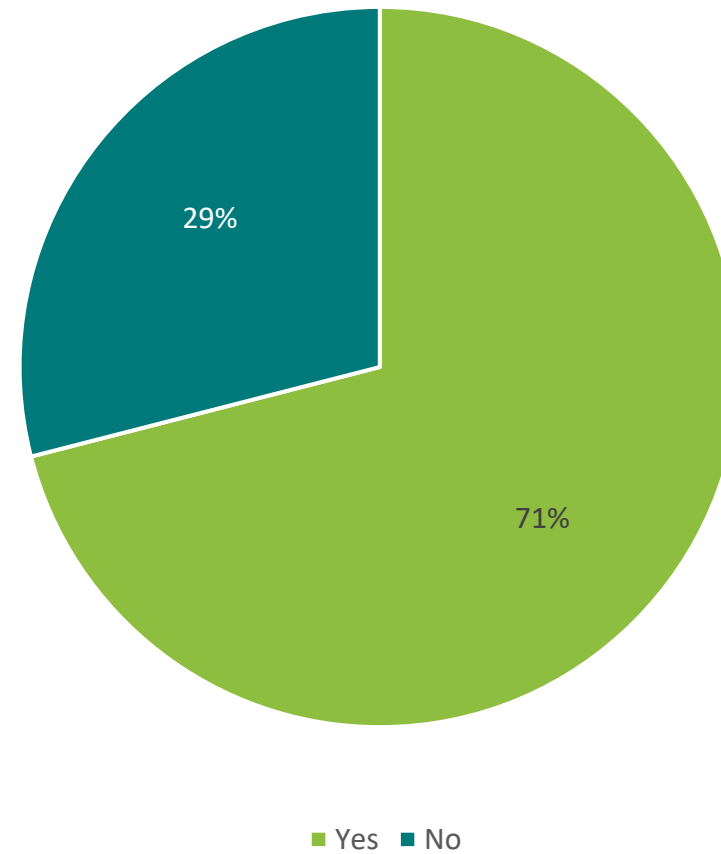


* Significant differences in bananas versus previous wave, at 95% confidence level

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

Just under three-quarters of those who have shopped for groceries online have purchased bananas online.

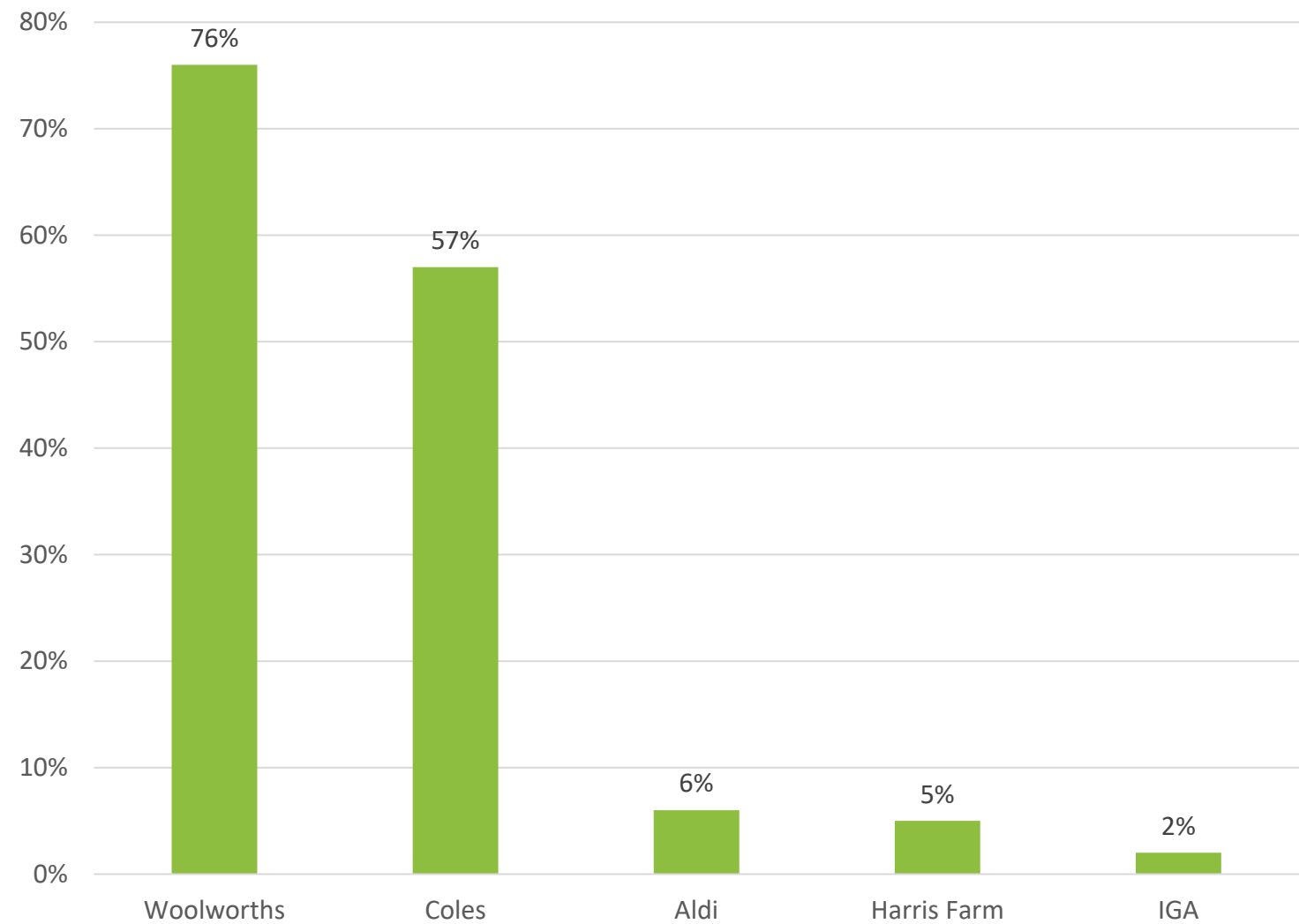
PURCHASED BANANAS ONLINE - PAST TWO MONTHS



ShopOnline2. Which one of these best describes when you usually decide to buy bananas? Base: Purchased groceries online n=210

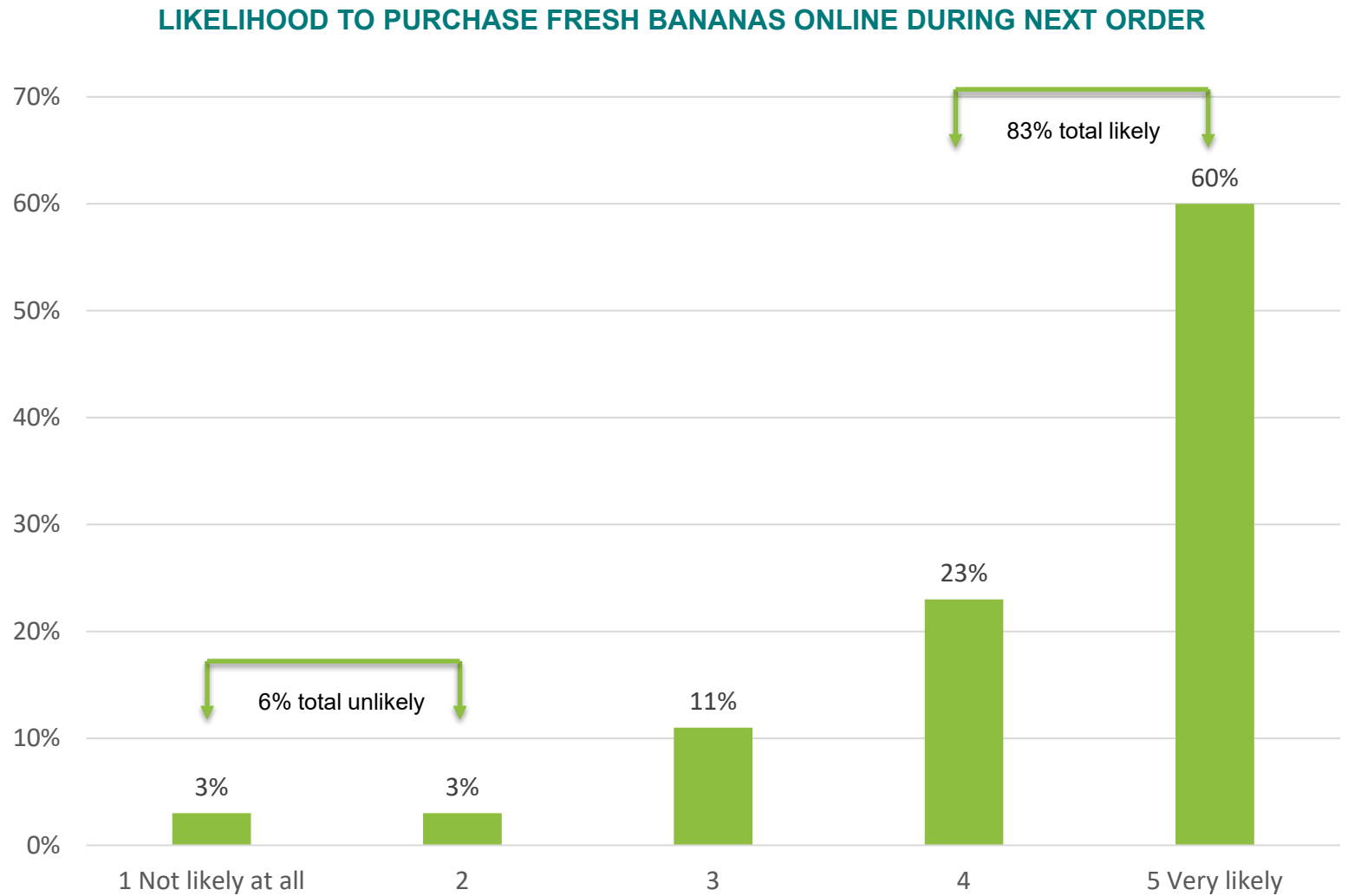
Woolworths and Coles dominate the online grocery shopping space

ONLINE GROCERY LOCATION



ShopOnline3. From which of the following supermarkets have you done your online grocery shopping? Base: Purchased bananas online n=149

Likelihood for re-purchasing bananas online is very high



ShopOnline4. How likely are you to buy fresh bananas online next time you do an online shopping order? Base: Purchased bananas online n=149

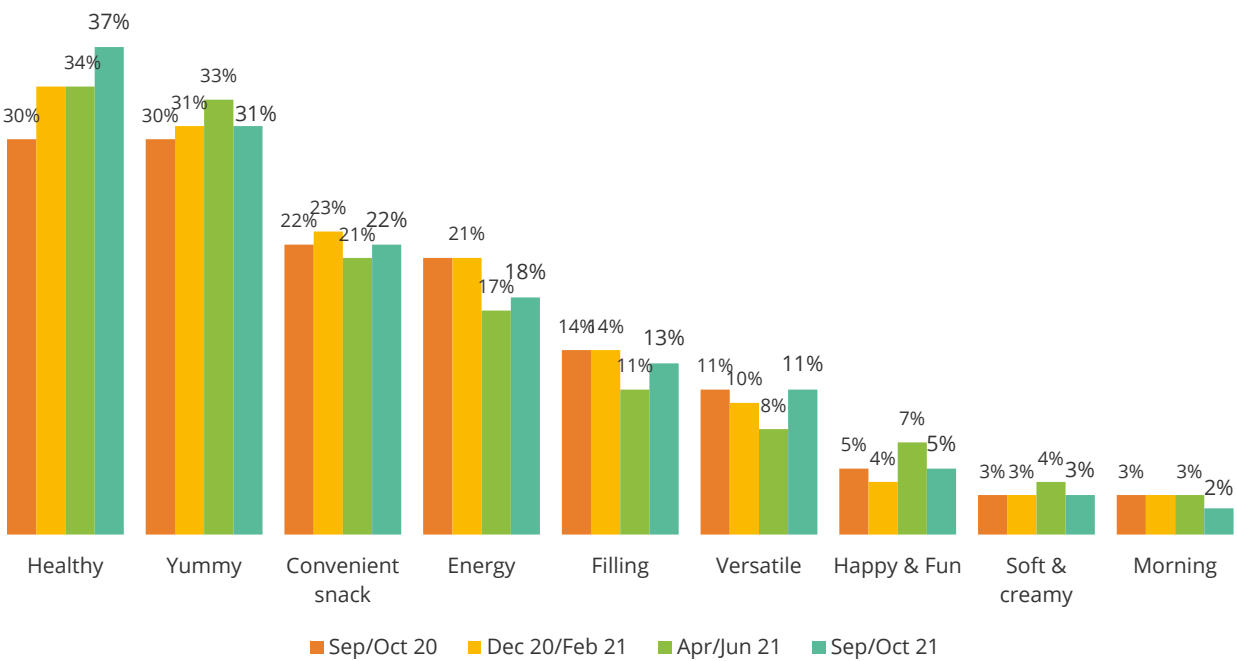
SECTION 3

Attitudes towards bananas



The top 3 spontaneous associations with bananas remain stable over time: *healthy*, *tasty*, *convenient snack*.

SPONTANEOUS ASSOCIATIONS WITH BANANAS - THEMES



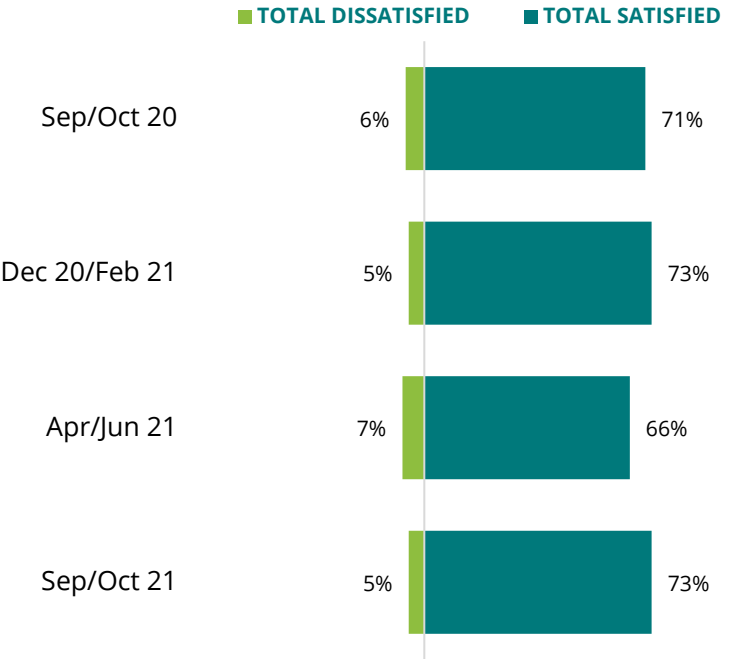
WORD CLOUD



Q. What words, images or feelings would you associate with bananas? Base Total: n=600 each wave

Satisfaction with the quality of bananas available remains consistently high, with an increase in satisfaction for September/October.

SATISFACTION WITH QUALITY OF BANANAS AVAILABLE FOR SALE RECENTLY



KEY REASONS FOR SATISFACTION LEVEL

SATISFIED

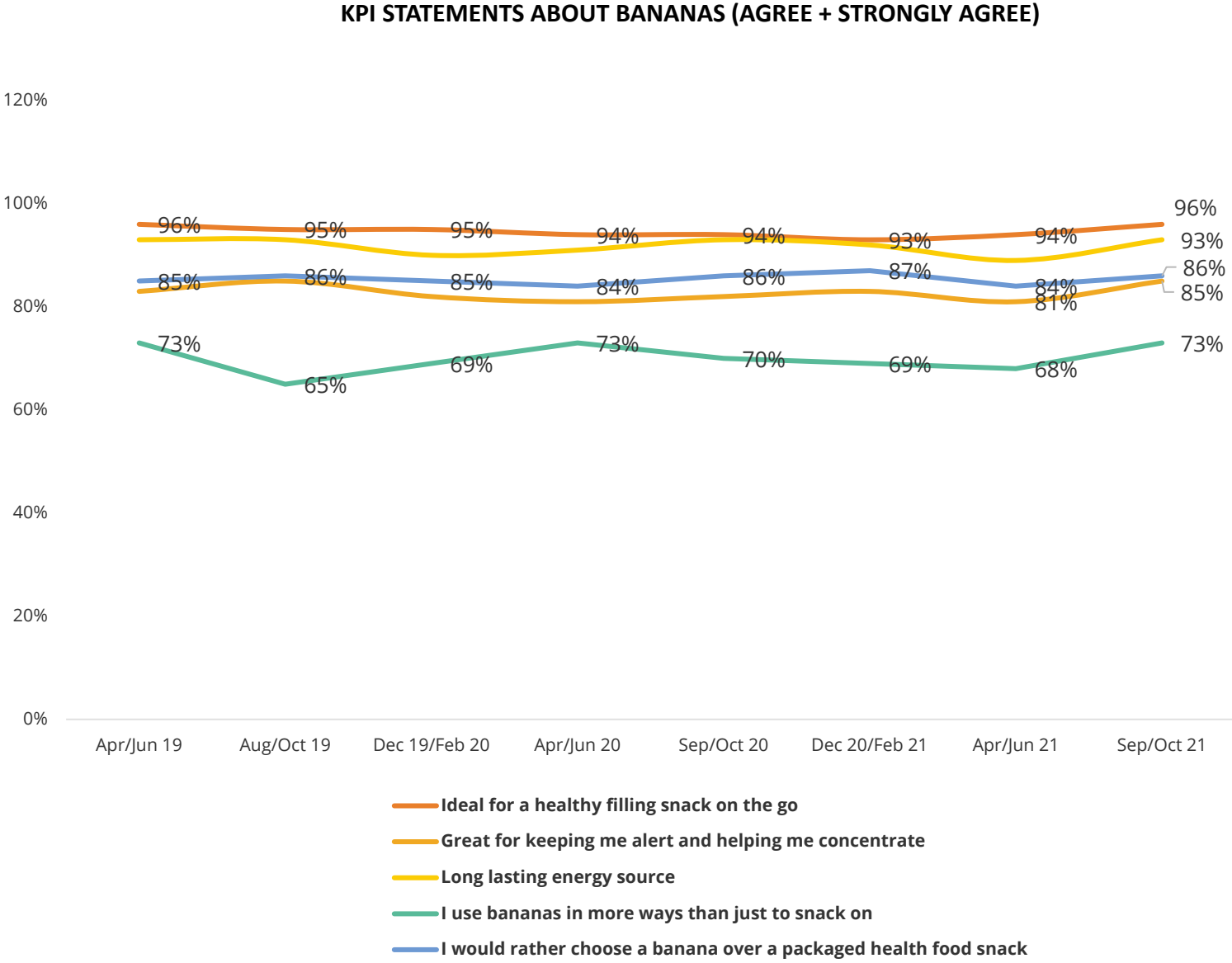
I found that they are good in quality
Bananas have looked nice and ripe lately
All the bananas I have seen in store have looked great, fresh and healthy

NOT SATISFIED (VERY LOW SAMPLE)

Lots of the banana are already ripen or bruise. Sometimes it is too small
They just don't seem to last long enough

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 remains high.



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

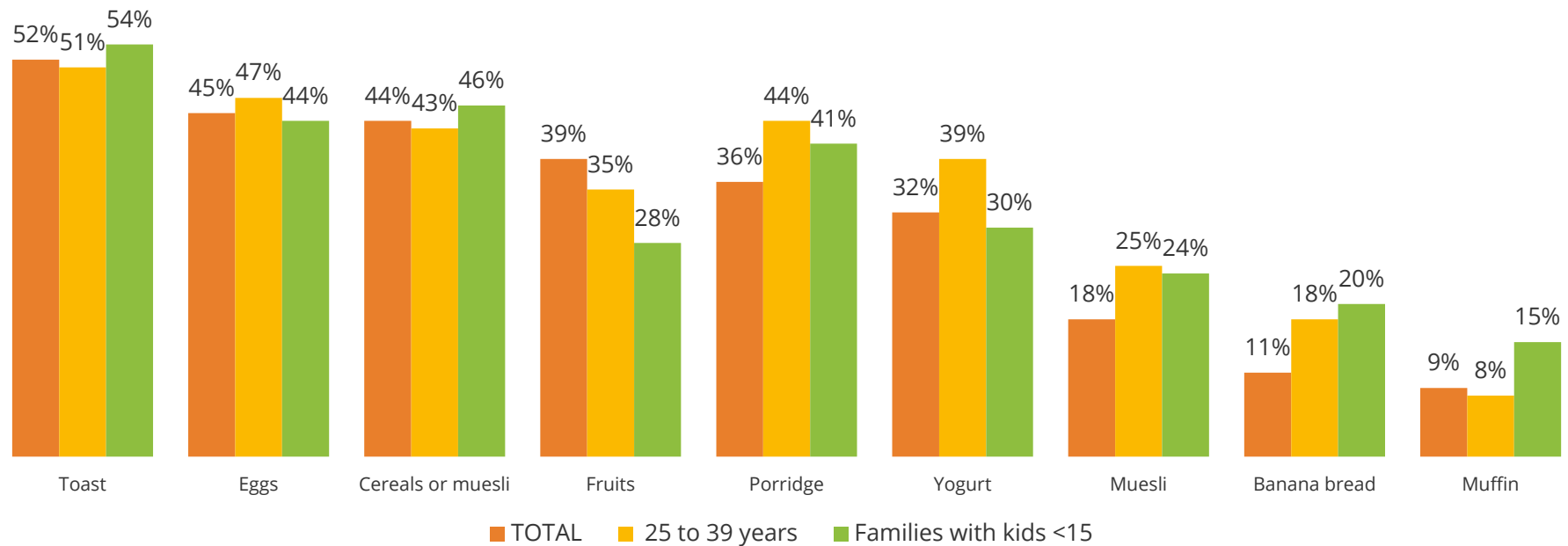
SECTION 4

Consumption and usage habit



Toast is the most popular breakfast meal for both the 25-39 year old and families with children under 15 groups

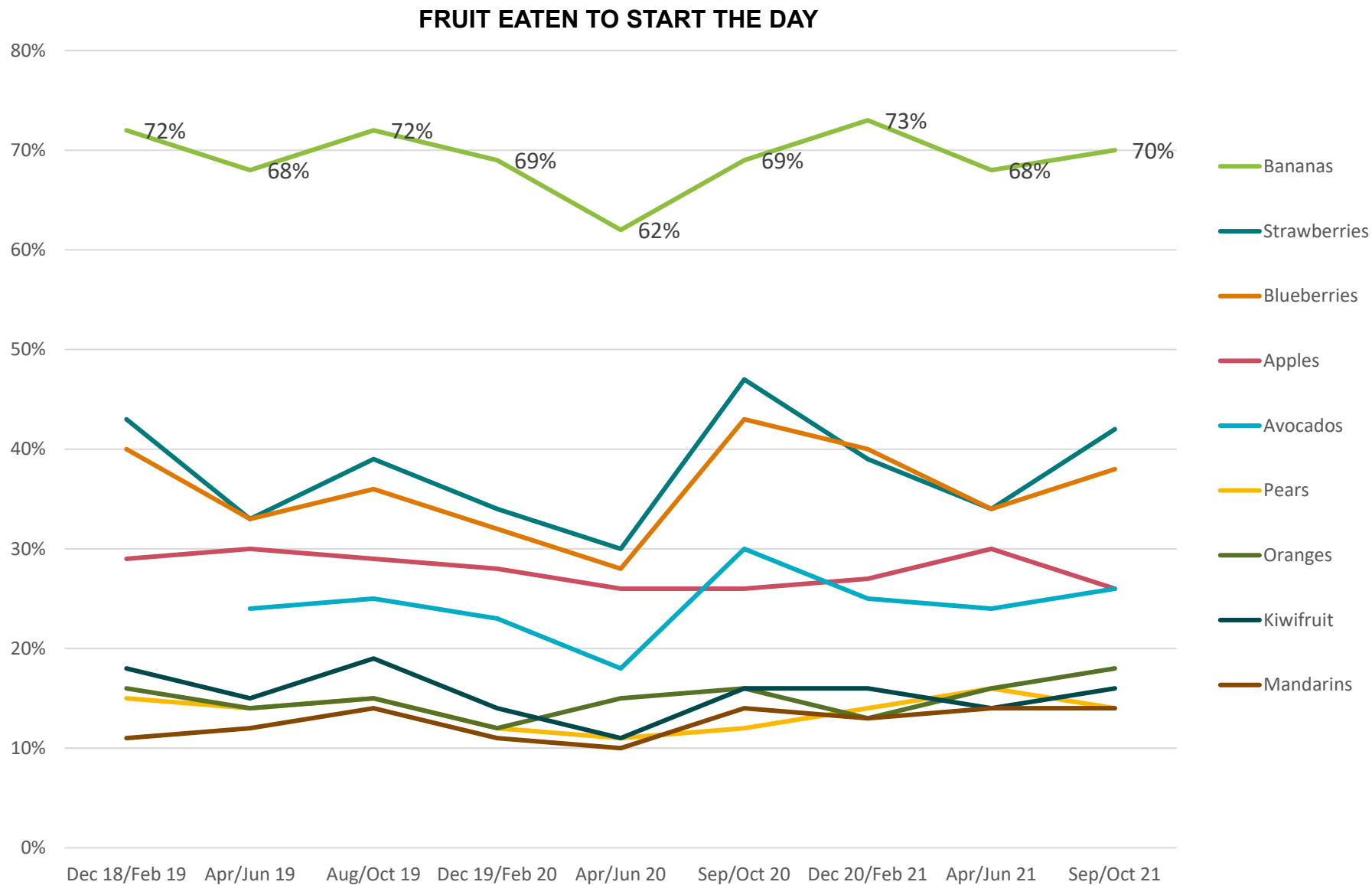
FOODS USUALLY EATEN FOR BREAKFAST - OCTOBER 2021 BY KEY AUDIENCE



MORNING. Which of the following would you usually have for breakfast? ; in October 2021 Total n=300, 25-39 years old n=77; Families with children <15 n=54

Bananas have consolidated its position as the most popular fruit at breakfast.

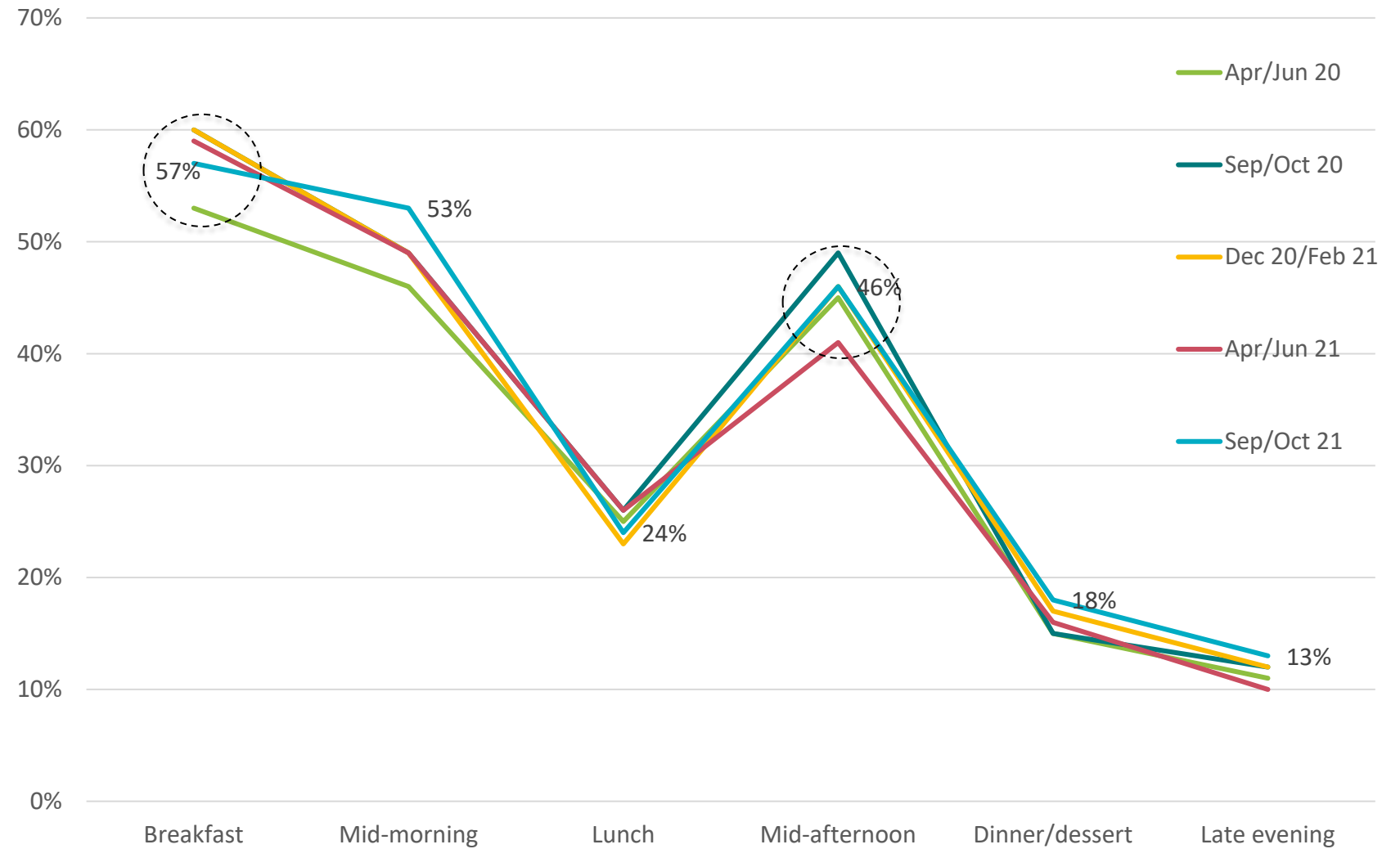
Strawberries and blueberries have also seen an uptick in breakfast consumption.



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

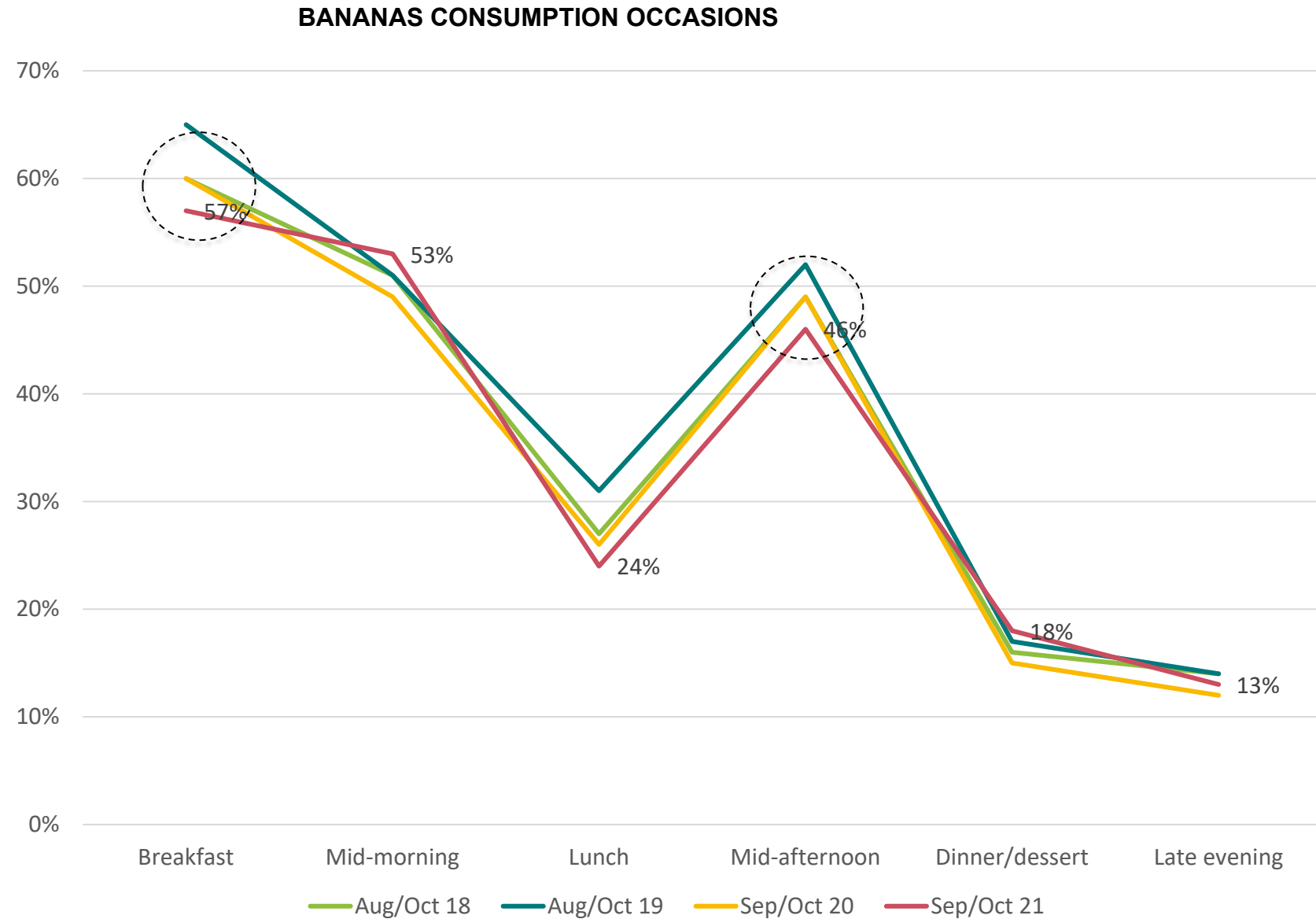
CONSUMPTION OCCASIONS

Banana consumption continues to shift away from being a mid-afternoon snack to being a breakfast food.



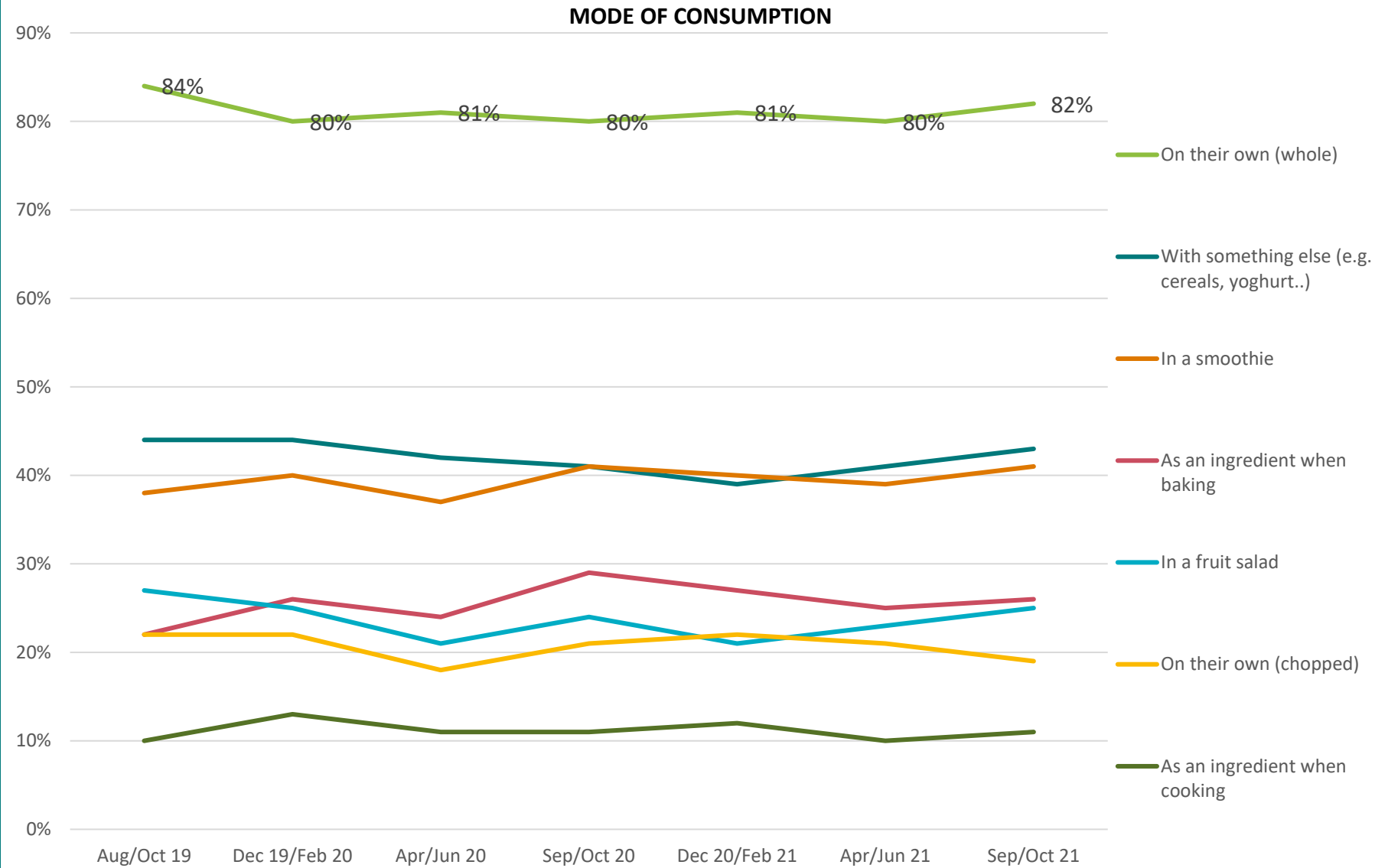
Q5a. Which of these best describe when you usually eat bananas? Base: Total n=600 each wave

When looking only at the Aug/Sep/Oct period over the last 4 years, we can see that this is not just a seasonal trend.



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

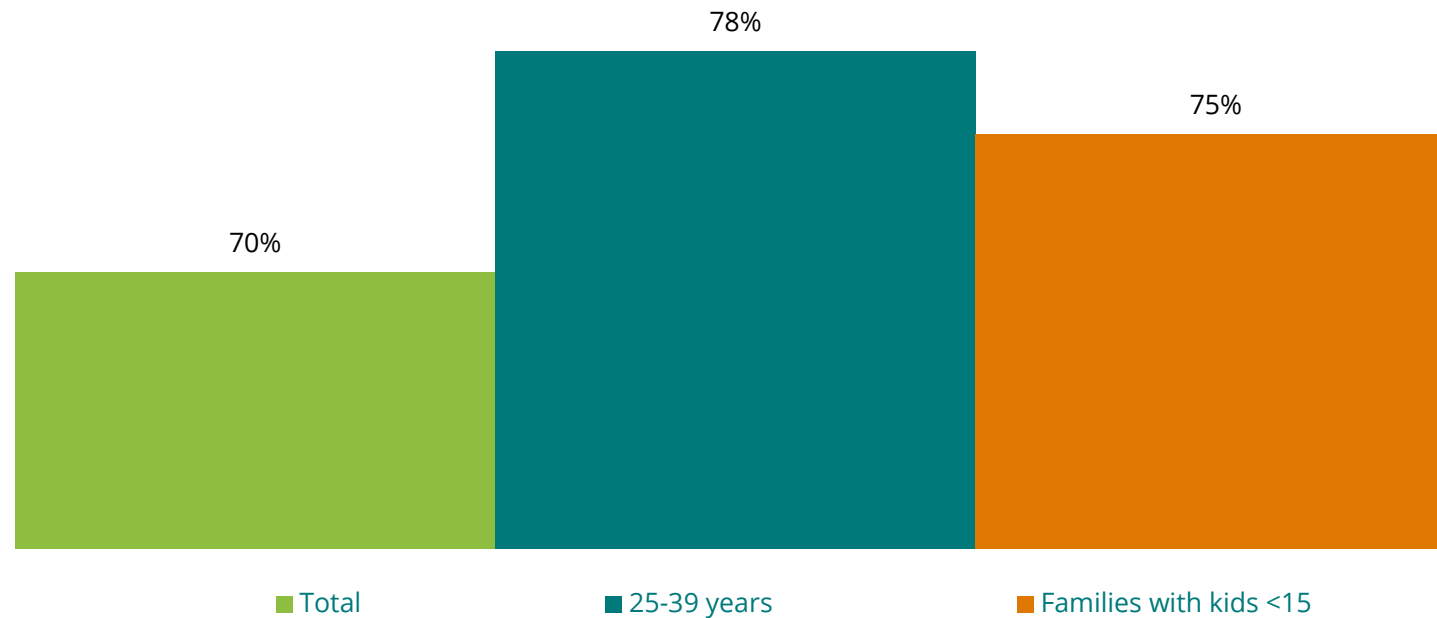
Bananas continue to be primarily eaten on their own.



Q5b. How do you usually eat bananas? Base: Eat bananas

Bananas are eaten mostly by the 25-39 years age group at breakfast time

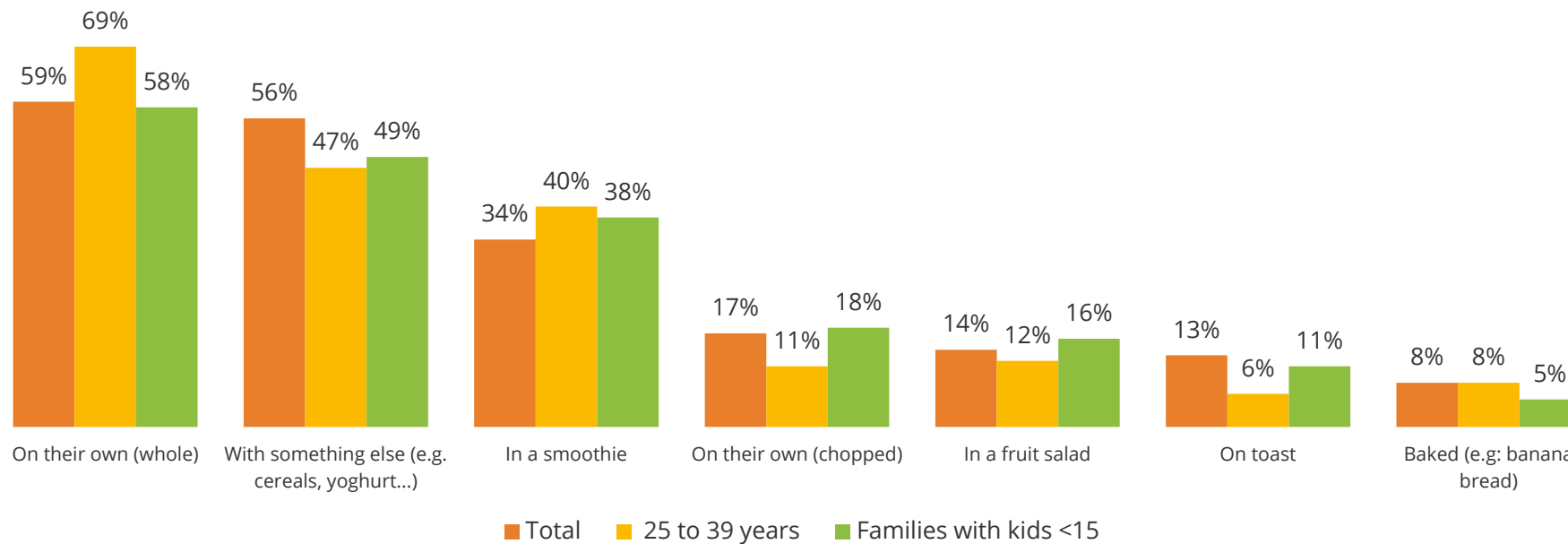
SEP/OCT 21 BANANA BREAKFAST CONSUMPTION - BY KEY AUDIENCE



Q1c Which of the following would you say is the type of fruit you might eat to start the day? Base: Total n=600

Bananas are still most likely to be consumed on their own at breakfast time. This is most evident for the 25 to 39 year old group.

MODE OF CONSUMPTION FOR BREAKFAST - BY KEY AUDIENCE



Q5b2 And thinking about breakfast specifically – how do you usually eat bananas then? Base: Eat bananas at breakfast n=343

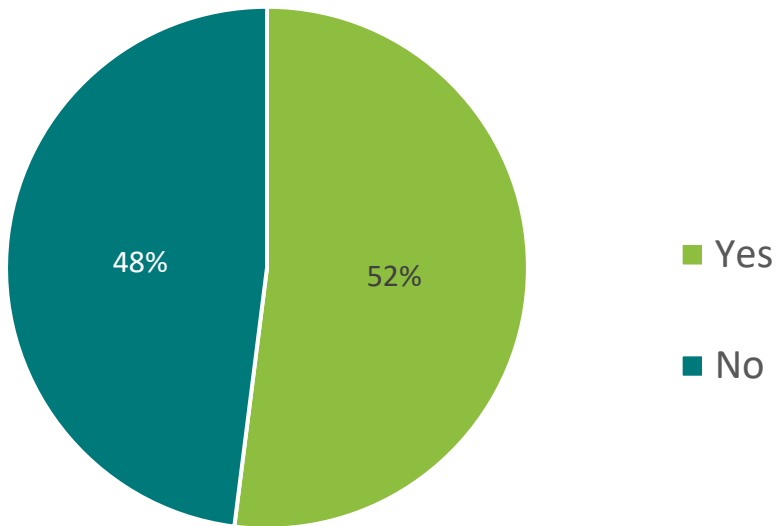
SECTION 5

Tagline effectiveness



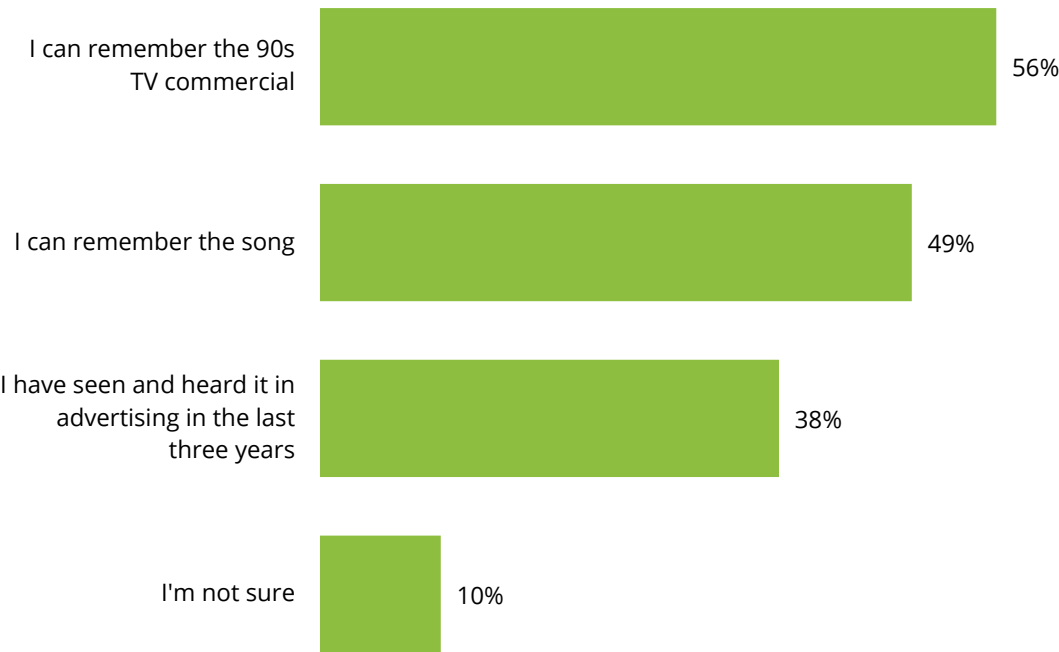
Just over half recall the 'Make your body sing' tagline, with recall being primarily driven by the 90s television commercial

TAGLINE RECALL



MAKE YOUR BODY SING

WHERE TAGLINE WAS HEARD

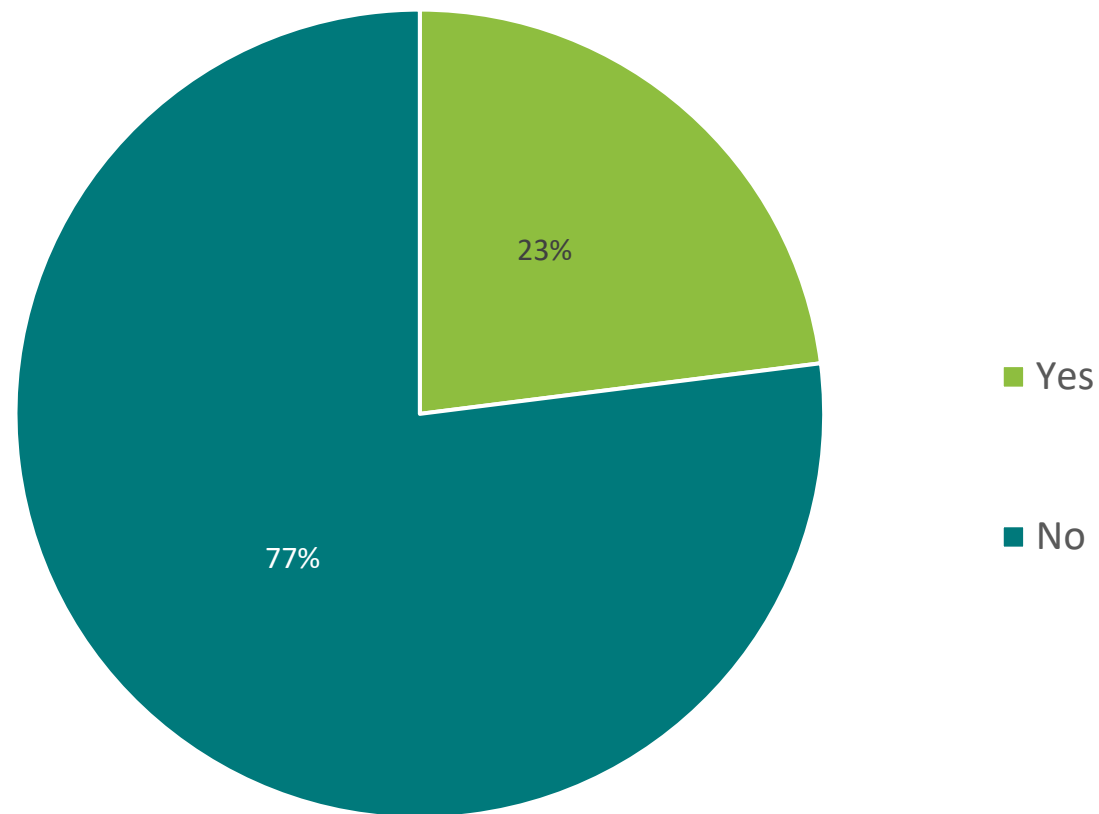


T1 Do you remember seeing or hearing this tagline above, for Australian bananas before today? Base: Total n=600 / T1a When and where have you heard this tagline? Base: Recall tagline: n=312

Approximately one in four recall the 'Peel Good, Feel Good' tagline.

PEEL GOOD, FEEL GOOD

TAGLINE RECALL

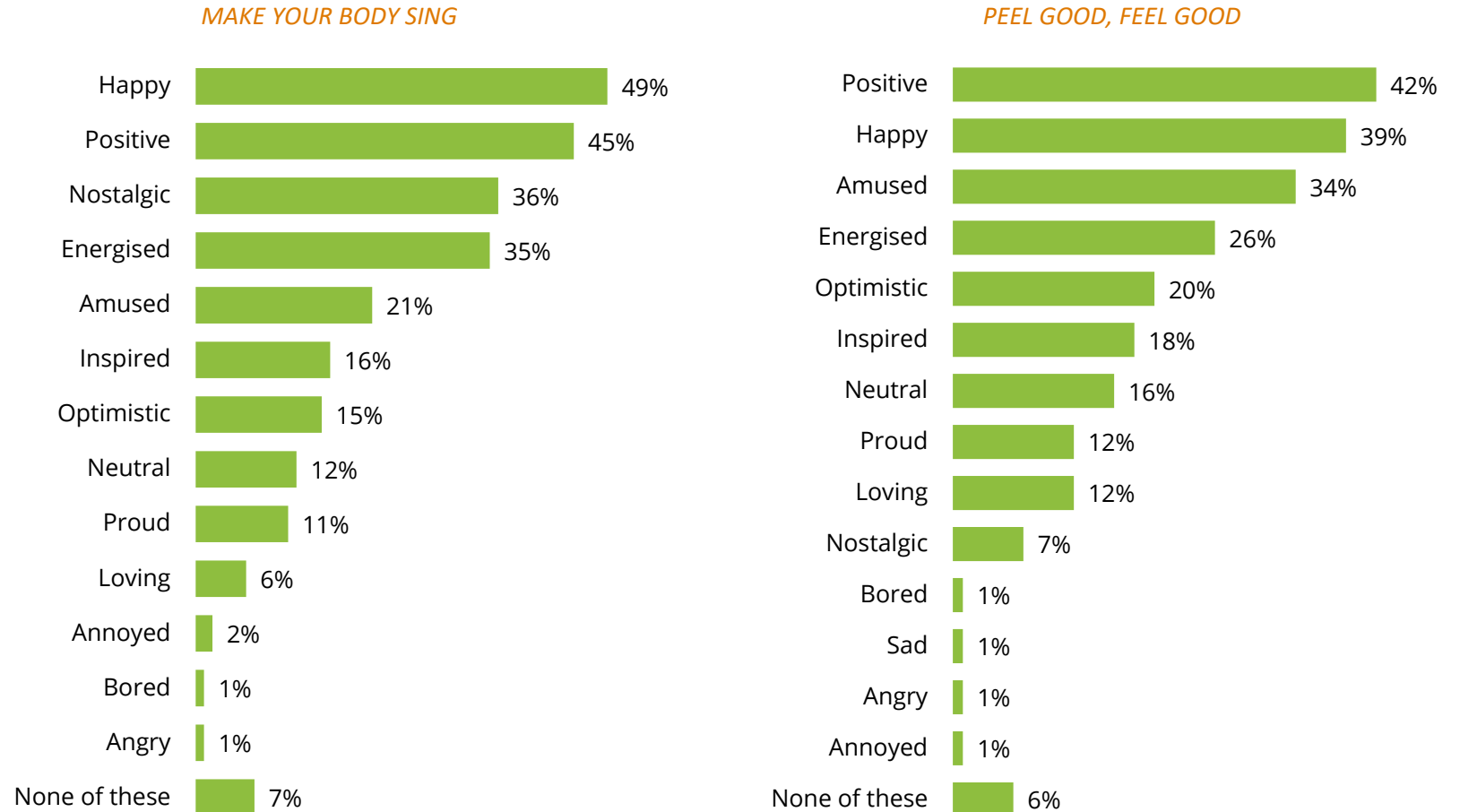


T1 Do you remember seeing or hearing this tagline above, for Australian bananas before today? Base: Total n=600

Both taglines evoke feelings of **happiness** and **positivity**.

However, 'Peel Good, Feel Good' evokes feelings of **amusement**, while 'Make your body sing' evokes feelings of **nostalgia**.

FEELINGS ASSOCIATED WITH THE TAGLINES

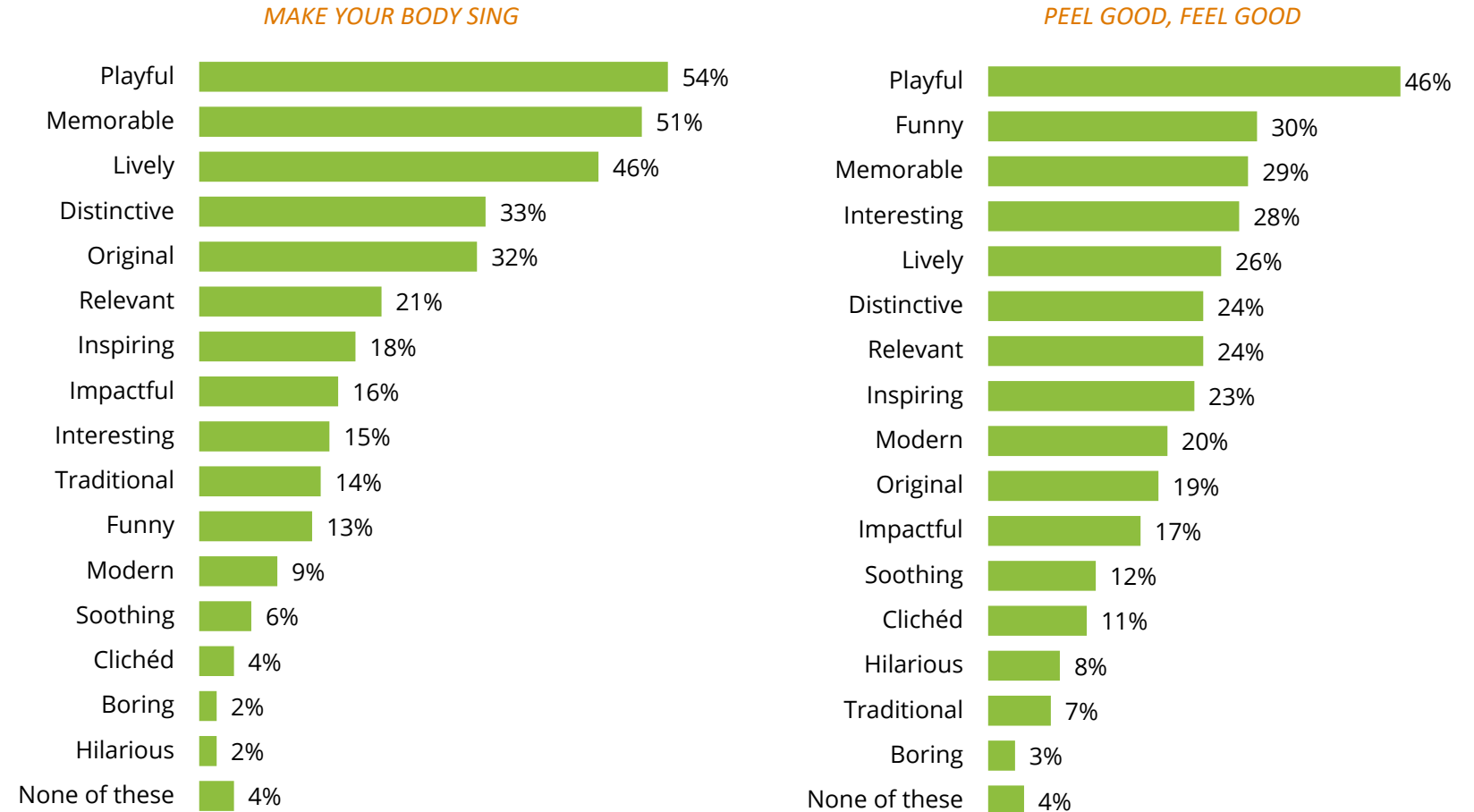


T2 How does this tagline make you feel? Base: Recall tagline n=312 / T7 How does this tagline make you feel? Base: Recall tagline n=137

The 'Make your body sing' tagline is associated with being **playful**, **memorable** and **lively**.

The 'Peel Good, Feel Good' tagline is mainly associated with being **playful**.

ATTRIBUTES ASSOCIATED WITH THE TAGLINES



T5 Thinking about the tagline, which of the following attributes would best describe it? Base: Recall tagline n=312 / T10 Thinking about the tagline, which of the following attributes would best describe it? Base: Recall tagline n=137

MAKE YOUR BODY SING

The 'make your body sing' tagline conveys the message of bananas being a natural source of energy

KEY MESSAGE TAKE AWAY

GIVES YOU ENERGY

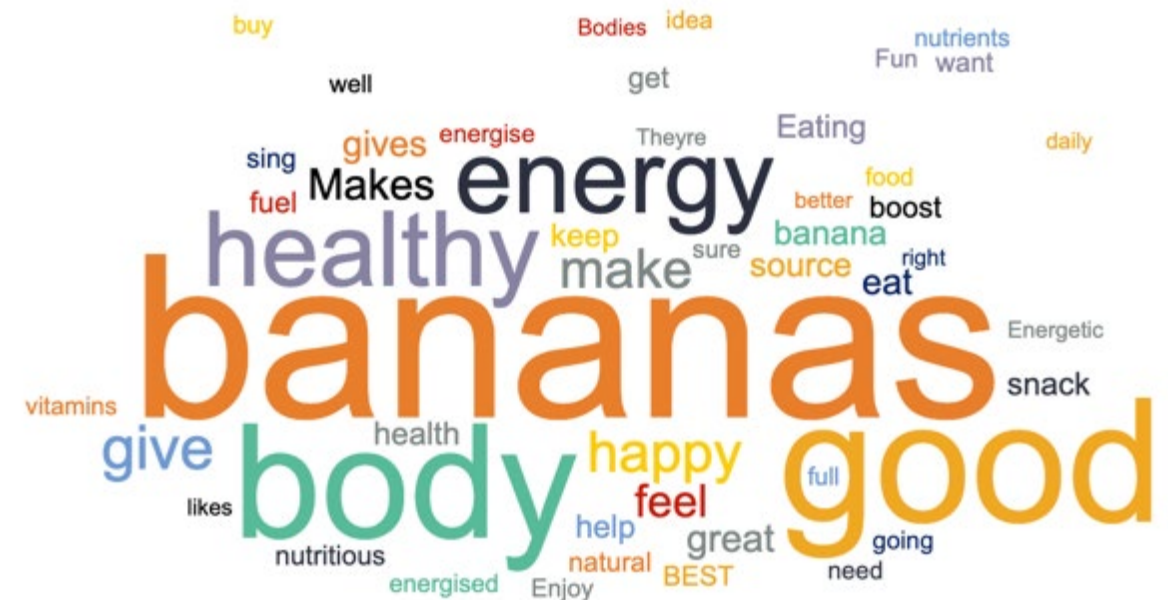
Gives you energy and bounce

Whatever they're advertising is full of energy

Give you the necessary vitamins and minerals to give you loads of energy

Bananas are a natural source of energy

WORDCLOUD



PEEL GOOD, FEEL GOOD

The tagline of 'Peel Good, Feel Good' resonates clearly with the audience

KEY MESSAGE TAKE AWAY

MAKES YOU FEEL GOOD

Eat bananas, feel good as a result

Bananas make you feel good and are easy to eat

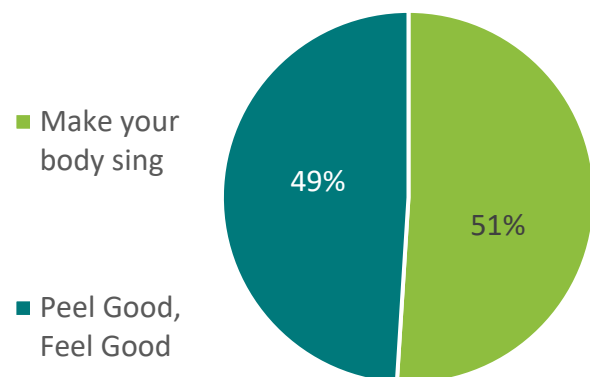
Peeling a banana and eating it is good for your body and your mind.

WORDCLOUD

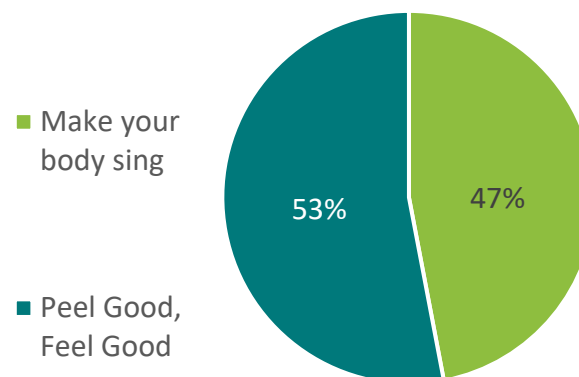


Tagline preference is very much driven by age

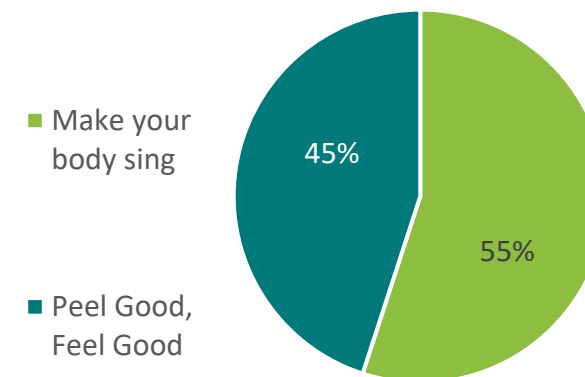
PREFERRED TAGLINE – TOTAL AUDIENCE



PREFERRED TAGLINE – 18-39 YEARS



PREFERRED TAGLINE – 40+ YEARS



T11 And thinking about the two taglines we showed you, which one would you prefer to see in future advertising for Australian bananas? Base: Total n=600 / Ages 18-39 n=241 / Ages 40+ n=359

eValueate

Edentify's Evaluate measures the effectiveness of content across **four dimensions**, providing a clear understanding of the performance of the creative, and an explanation of how and why it works.



Determine the relevance and believability of the tagline.



Evaluate how appealing and entertaining the tagline is.



Measure the strength and distinctiveness of branding in the tagline.



Assess the likelihood that the tagline will lead to attitude or behaviour change.



The 'Peel Good, Feel Good' tagline is seen as more relevant than 'Make your body sing'

TAGLINE CONNECTION SCORES

Easy to understand

Make your Body Sing



Peel Good, Feel Good



Relevant to me

Make your Body Sing



Peel Good, Feel Good



I believe what the tagline is telling me

Make your Body Sing



Peel Good, Feel Good

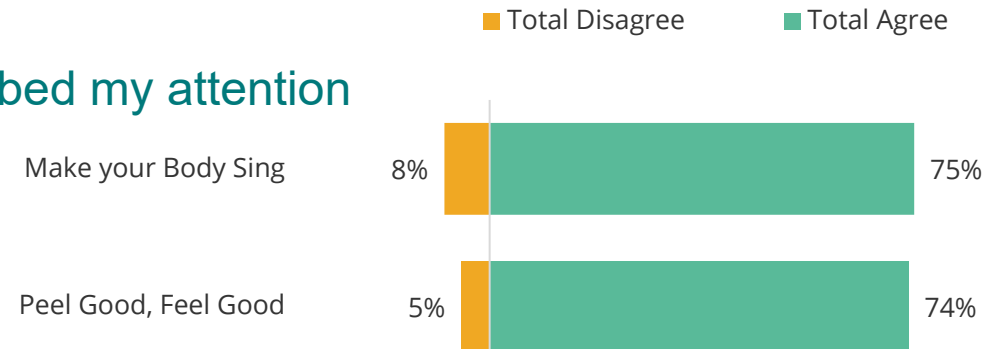




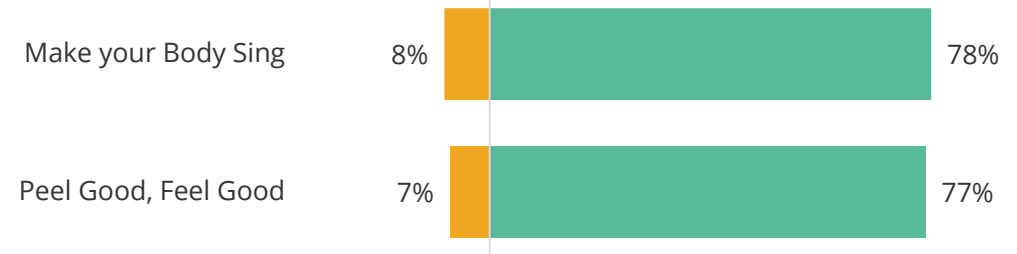
The taglines are equally able to draw enjoyment from the audience

TAGLINE APPEAL SCORES

Grabbed my attention



I like this tagline

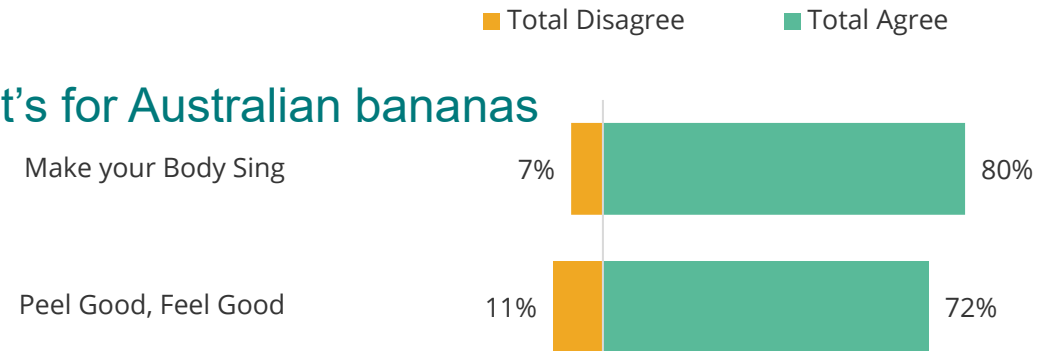




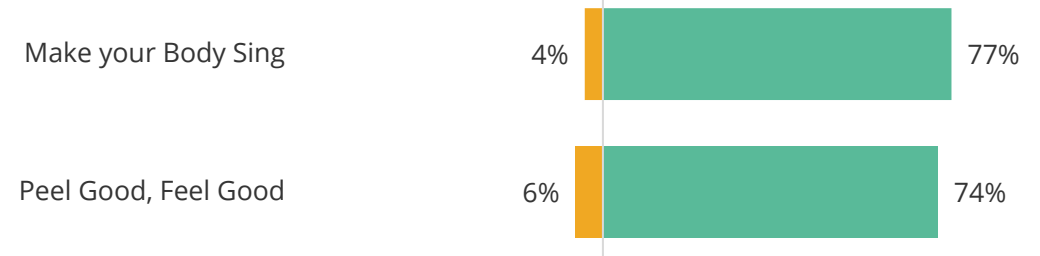
‘Make your body sing’ is more easily associated with the Australian Bananas brand

TAGLINE BRAND SCORES

Easy to recall it's for Australian bananas



Different to other fruits taglines



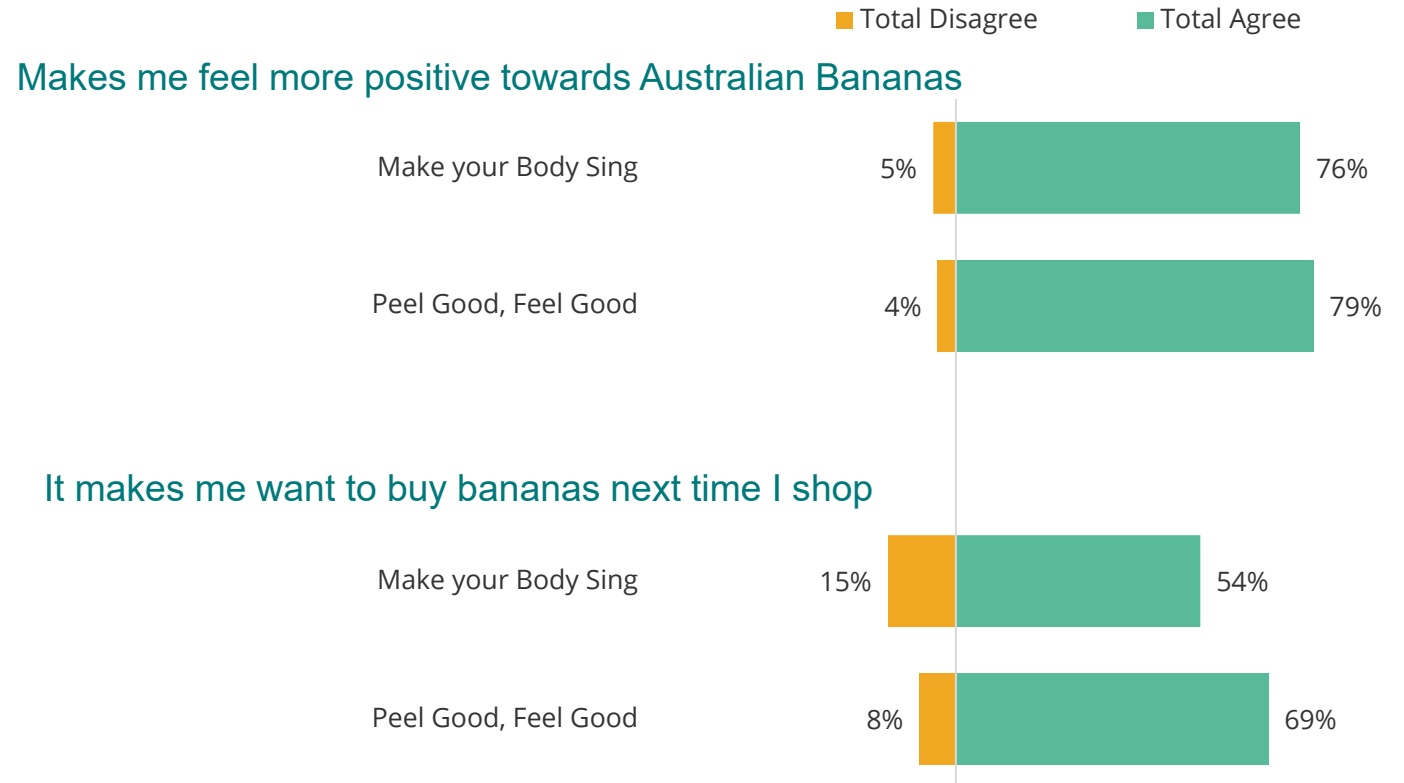
T4/T9 How strongly do you agree or disagree with each of these statements about the tagline? Base: Recall each tagline n=312 (Make your body sing)/n=137 (Peel good, feel good)



IMPACT

The 'Peel Good, Feel Good' tagline is more likely to make the audience want to buy bananas next time they shop.

TAGLINE IMPACT SCORES



T4/T9 How strongly do you agree or disagree with each of these statements about the tagline? Base: Recall each tagline n=312 (Make your body sing)/n=137 (Peel good, feel good)

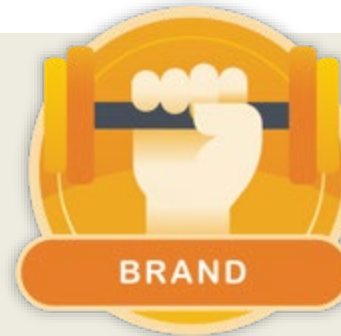
eValuate Summary



The 'Peel Good, Feel Good' tagline is seen as more relevant than 'Make your body sing'



The taglines are equally able to draw enjoyment from the audience



'Make your body sing' is more easily associated with the Australian Bananas brand



The 'Peel Good, Feel Good' tagline is more likely to make the audience want to buy bananas next time they shop.

Key Insights

- Bananas have maintained a positive perception; associated with health, taste and convenience.
- Bananas are mostly eaten wholly for breakfast consumption, primarily driven by the 25-39 years age group
- There has been a significant increase in online grocery shopping, with Woolworths and Coles being the primary locations
- The majority of online grocery shoppers have had positive experiences when purchasing bananas, with high likelihood of re-purchase
- The *Make your Body Sing* tagline evokes feelings of nostalgia and its preference is driven by the 40+ years age group
- The *Peel Good, Feel Good* tagline is more successful in creating a connection with the audience and impacting the audience. The preference for this tagline is primarily driven by the 18-39 years age group
- Preference for *Make your body sing* is driven by nostalgia, whereas preference for *Peel Good, Feel Good* is driven by relevancy



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Strategic levy investment

**BANANA
FUND**

 **edentify**

Contact:

Jordan Stalker; Research Project Manager; jordan@edentify.com.au

