

Passionfruit Marketing Update

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The passionfruit marketing levy has continued to deliver a social media campaign across the Aussie Passionfruit Facebook and Instagram accounts. The posts have focused on inspiring consumers to use passionfruit in a range of everyday and exciting foods as well as providing tips on selecting a ripe fruit and how best to store the fruit.

In early June, passionfruit received a 5-minute segment on the Today Show (Channel 9) with last years' winner of the Great Australian Bake Off – Ella Rossanis - showcasing desserts made with passionfruit. You can watch the segment at youtu.be/rSAxvu4kUNQ During the last few years, a portion of the levy has also been invested in the capture of a range of consumer and market insights through two main investments:

MT21003 Consumer Demand Spaces for horticulture is a multi-industry investment which identified and prioritised opportunities for the horticulture sector to engage consumers and build demand across the domestic market for fruits, nuts and vegetables. The final project report was published in November 2022 and can be read in full at www.horticulture.com.au/growers/help-your-business-grow/research-reports-publications-fact-sheets-and-more/mt21003/

MT 21004 Consumer purchase and retail data

gives industry access to the NielsenIQ Homescan panel which measures consumer purchasing behaviour and is the primary market read on retail consumer performance. The data is made available through a dedicated website portal called 'Harvest to Home' and can be accessed at www.harvesttohome.net.au

What are the key insights?

The MT21003 study was split into a series of phases and involved both in depth discussions with consumers and a 25-minute survey which asked 4000 consumers a series of questions about their fruit, vegetable and nut shopping and eating habits.

Interestingly, the pandemic has had an impact on not just how people work but how they structure the meals they eat. Lunch used to be a meal that involved effort, either through planning and preparing something prior to leaving home or purchasing at work.

Fast forward to working from home has meant people grab and go from whatever's in the fridge, and rarely is lunch purchased now. Leaving breakfast and dinner to play a bigger role, with more care and consideration going into preparation as there is more time at the bookends of the workday.



The second major shift has been with regard to the origin of the food purchased. Australian consumers have long had a 'support Australian' produce attitude with 96% of all fresh produce sold in the major supermarkets being domestically grown. What has shifted is the focus to supporting local farmers and areas, contributing to local communities and states. The clearest example of this is the Western Australian campaign 'Buy West, Eat Best' which has performed exceptionally well.

Another key insight which emerged during the research is the role that childhood experiences play in the choices adults are now making. What people were exposed to when they were young, in particular what fresh produce was used (and how) largely sets people up for how they use it as they get older.

A final key insight – which in some ways seems obvious - was that it is more important to influence what's purchased than what is consumed as people will choose what works for the moment that they're in based on what's readily available to them, they rarely seek out something specific.

The research report provides a broad understanding of how consumers shop for fresh produce, what triggers them to buy more or less and where they are purchasing. This key information forms part of the basis for the Demand Space framework which aims to represent a total Australian market map of commodity consumption that shows where commodities are strong today, and could grow in the future.

The analysis identified that there are 6 needs pillars (see below) and 5 meal occasions (breakfast, lunch, dinner, snack, dessert) and the opportunity for growth for each commodity lies in understanding how that product fits across these dimensions.

Six Needs Pillars

1. *Tasty:*

Taste, Refreshment, and Enjoyment

2. *Quick & Easy:*

Convenience Simplicity & Ease

3. *Healthy & Nutritious:*

Guilt-free, Nourishing and Sensible

4. *Indulgence:*

Comfort, Relaxation & Self Care

5. *Physical & Mental Energy:*

Energy, Uplift & Reinvigoration

6. *Connection:*

Bonding, Celebration & Creating Memories

Passionfruit Insights

For passionfruit, 43% of all occasions where the fruit is consumed is as a snack with 28% eaten on its own, 23% as a topping, 10% in a smoothie and 7% as part of some other snack.

Passionfruit is also exceptionally strong in the 'dessert' meal occasion which will not be a surprise to anyone!

When people buy passionfruit, they are looking for a refreshing taste, sweet flavour in a convenient form. Enhancing the flavours and texture of a dish are another standout feature for passionfruit.

The barriers to purchase for passionfruit are cost and quality, with consumers questioning ripeness as well as a number who simply don't know what to do with one.

There is still a significant myth out there that says that you have to wait until a passionfruit is wrinkled before its ripe and ready to eat and this is a major area for future communications activities to focus on.

Like all fruit, passionfruit are highly substitutable, with the large categories like banana and apples being easy alternatives. Berries, summerfruit and mango also have an expected substitutability for passionfruit buyers which reflects the 'snack' and 'dessert' meal occasion usages.

According to the report, the biggest opportunities for passionfruit lie in the dessert occasion and 'quick & easy', 'indulgence' and 'connection' needs pillars.

At the point of publication of this edition of The Passion Vine, the most recent data available on the Harvest to Home portal covers the 12 months to 11 September 2022. The data compares the year to September 2022 with the previous year and shows the trends in both value sales (how much passionfruit cost) and volume sales (how many passionfruit in kg were sold).

Based on this information, only 14% of all Australian households are ever buying a fresh passionfruit and passionfruit are bought about 3.5 times per year on average.

The oldies – also known as 'Senior Couples' are the largest purchasers of passionfruit with the three 'Family' segments choosing to buy other fruit in preference to passionfruit, perhaps reflecting the price challenge outlined above.

The insights from these two data sources should form the basis for the planning of any future passionfruit marketing activities.