

## **Final Report**

# **Macadamias Usage & Attitude Research Study**

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MC24001

**Project:**

Macadamias Usage & Attitude Research Study (MC24001)

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## Contents

|                              |               |
|------------------------------|---------------|
| Public summary               | <b>Error!</b> |
| <b>Bookmark not defined.</b> |               |
| Keywords                     | 4             |
| Introduction                 | 4             |
| Methodology                  | 4             |
| Results and discussion       | 5             |
| Outputs                      | 5             |
| Outcomes                     | 6             |
| Monitoring and evaluation    | 7             |
| Recommendations              | 8             |

## Public summary

Quantitative Usage & Attitude research study designed to delve more deeply into understanding consumption and purchase behaviours around Nuts in general and Macadamia nuts specifically building on the Phase 1: Discovery research conducted (based on combination of desktop research & social listening)

6,056 online interviews conducted with respondents aged 18-74 years of age who had consumed Nuts in the past 6 months, were the primary shopper, and were aware of and non-rejectors of Macadamia nuts

Markets included Australia, USA, China, Japan, South Korea and India (+1000 respondents per market)

Key research goals: Overall objective of the project is to help Hort Innovation and the Australian macadamia industry:

- Utilize insights around consumers awareness, usage and purchase behaviour patterns for macadamias to inform marketing strategy development and evaluation
- Increase food manufacturers' knowledge of consumer appeal for macadamias
- Increase food manufacturers' knowledge of the alignment of macadamias to current and future consumer, food and health trends
- Promote the Australian macadamia industry's leadership position

The report tested and confirmed some key hypotheses such as the 'Biggest barrier to greater consumption / frequency outside of cost is Physical & Mental availability', that 'Snacking remains the most important occasion for Nuts and Macadamia's, however further meal opportunities and other occasions are also of importance' and that 'Health is important in relation to snacking'.

The report also looked at key market metrics, macadamia associations and occasions, health & dieting, category expansion opportunities, provenance, key channels and barriers.

## Keywords

Macadamia's Usage & Attitudes Research Study, Consumer Behaviour, Australia, USA, Japan, China, South Korea, India

## Introduction

Quantitative Usage & Attitude research study designed to delve more deeply into understanding consumption and purchase behaviours around Nuts in general and Macadamia nuts specifically building on the Phase 1: Discovery research conducted (based on combination of desktop research & social listening)

## Methodology

6,056 online interviews conducted with respondents aged 18-74 years of age who had consumed Nuts in the past 6 months, were the primary shopper, and were aware of and non-rejectors of Macadamia nuts [Photos/images/other audio-visual material](#)

*Refer to uploaded presentations within the portal*

## Results and discussion

Refer to uploaded presentations within the portal

## Photos/images/other audio-visual material

Refer to uploaded presentations within the portal

## Outputs

Refer to uploaded presentations within the portal

**Table 1. Output summary**

| Output   | Description  | Detail  |
|--|--|---|
| <a href="#">Macadamias U&amp;A Global Presentation October 2024 (Final).pptx</a> | Global Macadamias U&A Summary Powerpoint Report covering analysis across the key markets | Analysis / Outputs delivered covering consumer awareness, consumption, attitudes to health, nut associations and purchase behaviours across key markets |
| <a href="#">Macadamias U&amp;A AU Presentation October 2024 (Final).pptx</a>     | Macadamias U&A Powerpoint Report covering analysis for the Australian market             | Analysis / Outputs delivered covering consumer awareness, consumption, attitudes to health, nut associations and purchase behaviours for this market    |
| <a href="#">Macadamias U&amp;A USA Presentation October 2024 (Final).pptx</a>    | Macadamias U&A Powerpoint Report covering analysis for the US market                     | Analysis / Outputs delivered covering consumer awareness, consumption, attitudes to health, nut associations and purchase behaviours for this market    |
| <a href="#">Macadamias U&amp;A JP Presentation October 2024 (Final).pptx</a>     | Macadamias U&A Powerpoint Report covering analysis for the Japan market                  | Analysis / Outputs delivered covering consumer awareness, consumption, attitudes to health, nut associations and purchase behaviours for this market    |
| <a href="#">Macadamias U&amp;A CH Presentation October 2024 (Final).pptx</a>     | Macadamias U&A Powerpoint Report covering analysis for the China market                  | Analysis / Outputs delivered covering consumer awareness, consumption, attitudes to health, nut associations and purchase behaviours for this market    |
| <a href="#">Macadamias U&amp;A SK Presentation October 2024 (Final).pptx</a>     | Macadamias U&A Powerpoint Report covering analysis for the South Korea market            | Analysis / Outputs delivered covering consumer awareness, consumption, attitudes to health, nut associations and purchase behaviours for this market    |
| <a href="#">Macadamias U&amp;A IN Presentation October 2024 (Final).pptx</a>     | Macadamias U&A Powerpoint Report covering analysis for the India market                  | Analysis / Outputs delivered covering consumer awareness, consumption, attitudes to health, nut associations and purchase behaviours for this market    |

## Photos/images/other audio-visual material

Refer to uploaded presentations within the portal or via the links above

## Outcomes

< Detail the intermediate and end-of-project outcomes and how these support relevant Fund outcomes (as per industry Strategic Investment Plan(ies) or Hort Frontiers Strategy). Outcomes are the desired result of the project and represent the project's unique contribution to the relevant Fund outcome(s), strategy(ies) and Key Performance Indicator(s). For grant projects (or projects with external funding sources) the linkage to grant outcomes should also be included where appropriate.

A summary of the project's outcomes should be completed using the table below, supported with monitoring data collected to provide evidence of outcomes as per the project's M&E Plan. Where possible provide a statement of costs and benefits achieved in delivery of the project. For more information, refer to *Attachment A3: Final report guide* >

**Table 2. Outcome summary**

| Outcome   | Alignment to fund outcome, strategy and KPI   | Description   | Evidence   |
|---|---|---|--|
| <p>Final report and presentations at the conclusion of the project delivered 'Business Insights' on demand (consumer behaviour) data and insights, market and industry trends to drive informed decision-making.</p> <p>Covering consumer awareness, consumption, attitudes to health and snacking, usage of different nuts including Macadamias, whitespace opportunities, purchasing behaviours, understanding of provenance and product satisfaction</p> | <p>Overall objective of the project is to help Hort Innovation and the Australian macadamia industry:</p> <p>Utilise insights around consumers awareness, usage and purchase behaviour patterns for macadamias to inform marketing strategy development and evaluation</p> <p>Increase food manufacturers' knowledge of consumer appeal for macadamias</p> <p>Increase food manufacturers' knowledge of the alignment of macadamias to current and future consumer, food and health trends</p> <p>Promote the Australian macadamia industry's leadership position</p> | <p>Delivered insights and data linking back to Macadamias industry strategy and supporting:</p> <p>Broader macro trend understanding of health, snacking and general product usage &amp; attitudes</p> <p>Understanding of key market consumer &amp; shopper dynamics</p> <p>Identified opportunity areas for Macadamias across occasions, ingredient / product usage and recipes</p> <p>Enhanced communications and marketing content creation</p> | <p>Research conducted and delivered via social listening, desktop research and online quantitative surveys of 6,056 respondents across 6 key markets – Australia, USA, China, Japan, South Korea and India</p> |

## Recommendations

- Utilise the results and key findings to refine go to market strategies in each market
- Potential to target more country specific research around key occasions, product uses / concepts, behaviours and beliefs to overcome barriers to greater usage and consumption
- Opportunities to delve further into key influences and influencers (such as Chefs, Nutritionists, Social and Other Media personalities) to support reaching potential consumer audiences
- Development of further marketing and communications to address awareness and increase consideration of Macadamias in each market

## Intellectual property

'No project IP or commercialisation to report'