



Table grapes: consumer acceptance KPI

May 2022

NielsenIQ **Homescan**

Project TG-19003 –
Table Grapes Consumer Acceptance & Attitudes
Homescan Quality Performance Tracker Dec 20 – May 22

June 2022

The Hort Innovation logo, with "Hort" in grey and "Innovation" in red, set against a background of a basket of green and purple table grapes.

Hort
Innovation

Homescan quality performance tracker

Ongoing measurement and reporting of quality perceptions using NielsenIQ Homescan Panel to assess whether Australian table grapes meet the 80% liking benchmark, reasons for missing the target and validation of time to recover from a bad experience



Fieldwork

9 waves (3 per season)

S1	Dec 20	Mar 21	May 21
S2	Dec 21	Mar 22	May 22
S3	Dec 22	Mar 22	May 23

Dates
N=

S1	11-17 Dec N=755	4-10 Mar N=1049	20-26 May N=1117
S2	25 Nov – 1 Dec N=213	24 Feb – 3 Mar N=1483	May N=1305
S3			



Methodology

Online survey sent to Homescan Consumer Panel of 10,000 Australian households



Sampling

Full Nielsen Homescan panel



Sample size

(May '22) Total sample of 1305 households



Coverage

Demographically and geographically representative sample of all Australian households



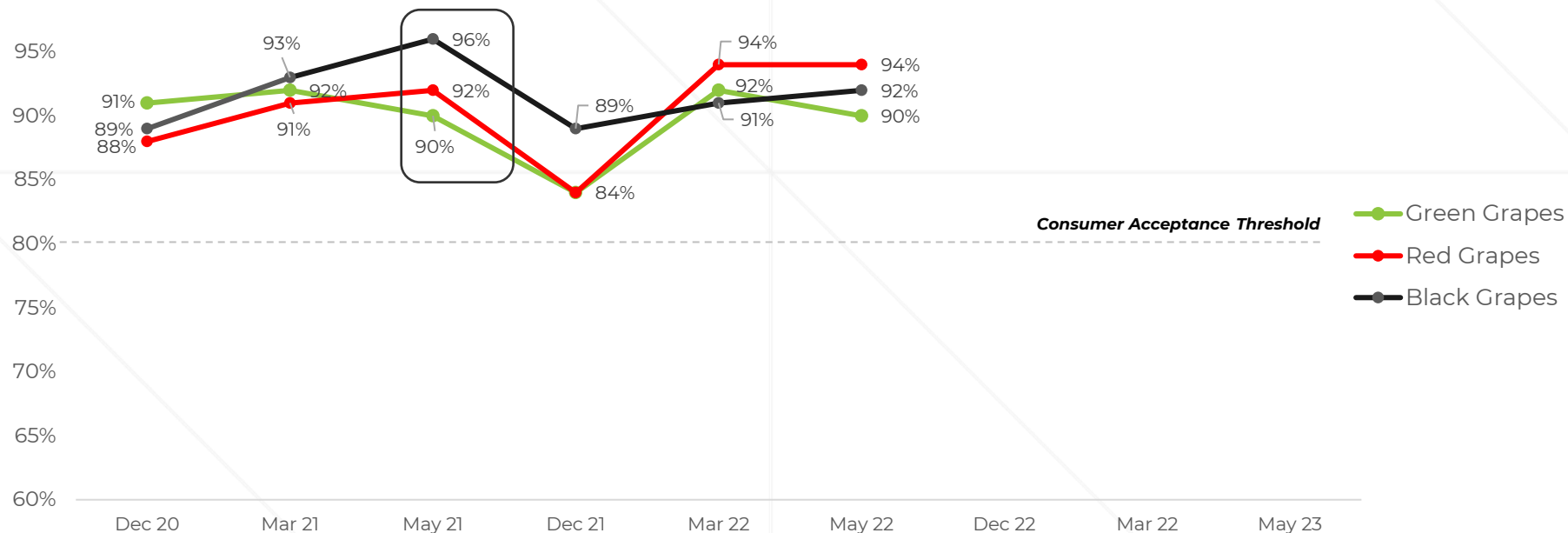
Survey duration

5 minutes

Consumer acceptance for all remains above the threshold, with green consistent with the same time last year

Black a little lower and red a little higher compared to May last year

100% **Top 3 box acceptance score**



Q2. Please indicate how much you liked or disliked the grapes you bought? Dec 20 n=755; Mar 21 n=1049, May 21 n=1117, Dec 21 n=213*, Mar 22 n=1483, May 22 n=1305

* Results for red and black grapes are indicative only

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Consumer acceptance of red grapes is the highest since tracking began, increasing penetration as a result

Penetration of green grapes has decreased since mid season, but acceptance remains high

May 22

Percentage of shoppers purchasing...

n=1305



53% (73% March '22)

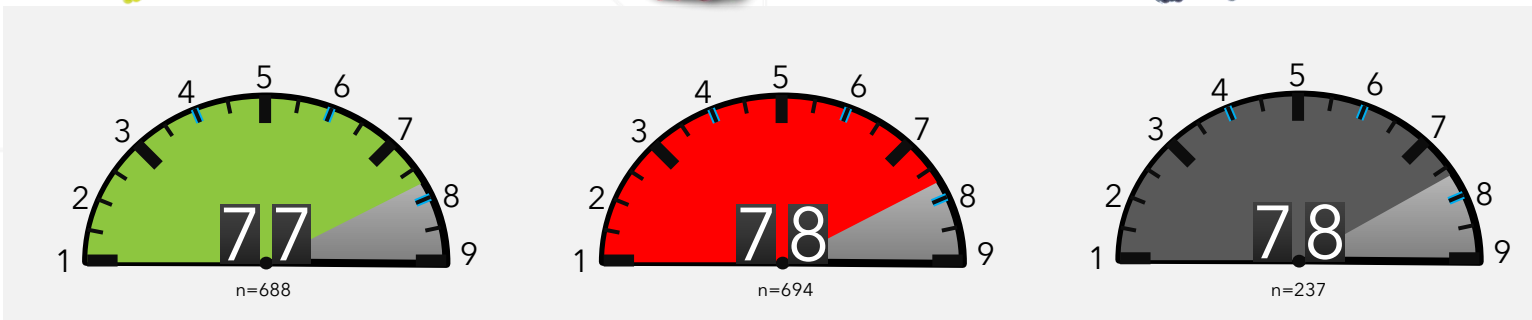


54% (29% March '22)



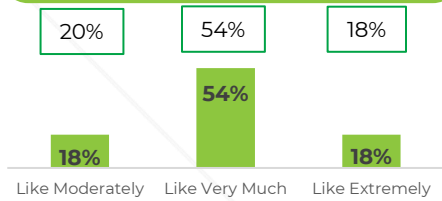
18% (19% March '22)

AVERAGE SCORE

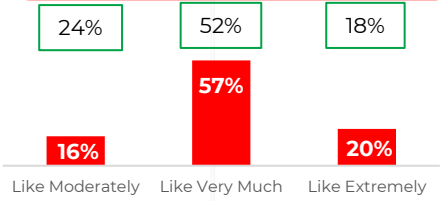


Consumer acceptance = 90%

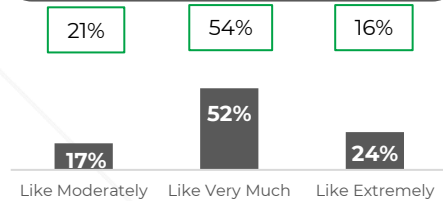
March '22



Consumer acceptance = 94%



Consumer acceptance = 92%



Q1. Were the grapes you bought green, red or black?
 Q2. Please indicate how much you liked or disliked the grapes you bought?
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Rating of green grapes has recovered well since the start of the season with all factors except consistency above acceptable levels

Big improvements for colour, consistency, and in particular shape, which were below acceptable levels as at Dec '21

May
22

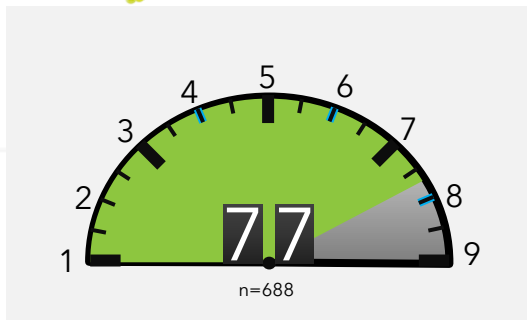
Percentage of shoppers purchasing...

n=688

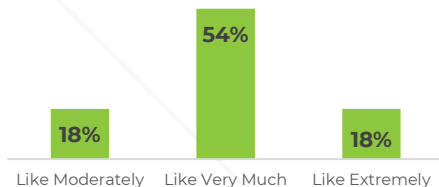


53% (73% March '22)

AVERAGE SCORE



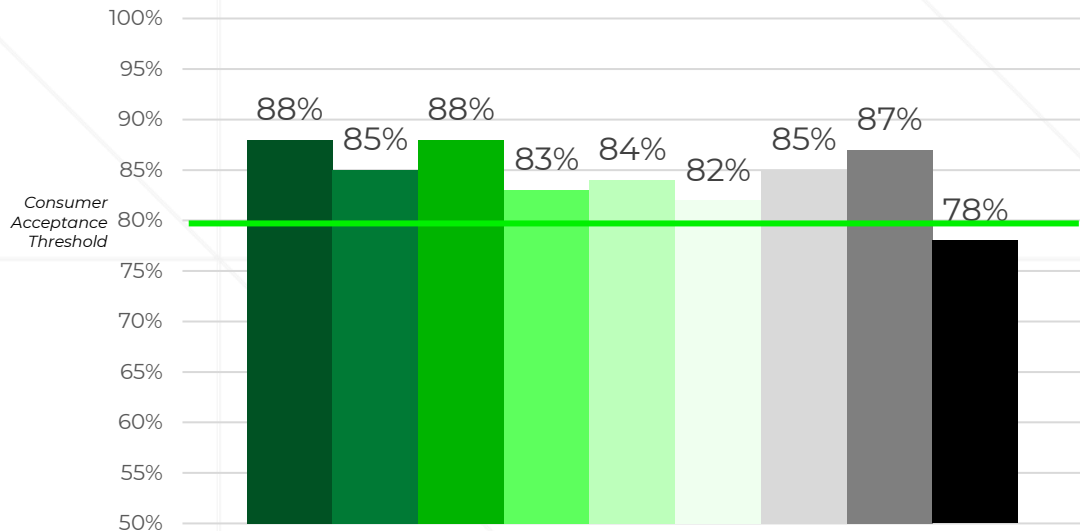
Consumer acceptance = 90%



Q1. Were the grapes you bought green, red or black?

Q2. Please indicate how much you liked or disliked the grapes you bought?

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Most important ← → Least important

- Taste
- Juiciness
- Crunch
- Firmness of flesh
- Consistency of quality in the bunch
- Flavour balance
- Freshness
- Colour
- Shape

Green grape acceptability has softened across all retailers and in QLD and SA

WA remains consistently strong

	Coles	Woolworths	ALDI	IGA	Non-Supers
Mar '22	N=655	N=768	N=330	N=146	N=342
Consumer Acceptance	92%	93%	95%	96%	93%
Average Score	7.8	7.8	7.9	8.0	7.8
May '22	N=443	N=471	N=219	N=106	N=211
Consumer Acceptance	91%	89%	88%	94%	88%
Average Score	7.7	7.7	7.6	7.8	7.5
	NSW	VIC	QLD	SA	WA
Mar '22	N=341	N=267	N=258	N=93	N=93
Consumer Acceptance	90%	90%	96%	99%	95%
Average Score	7.6	7.7	7.9	8.0	7.9
May '22	N=214	N=149	N=151	N=61	N=83
Consumer Acceptance	86%	90%	85%	91%	96%
Average Score	7.6	7.7	7.6	7.7	8.0

○ Significantly lower than Total
○ Significantly higher than Total

Acceptance of red grapes has risen above acceptable levels for all aspects

Flavour balance, colour, shape and consistency have all crept over the acceptable levels

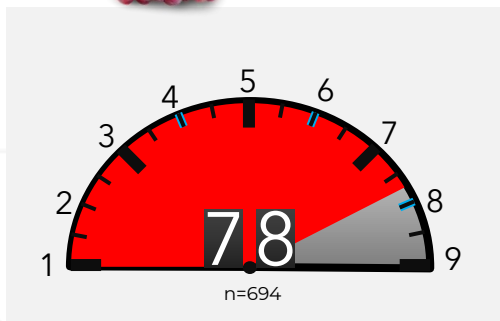
May 22

Percentage of shoppers purchasing...

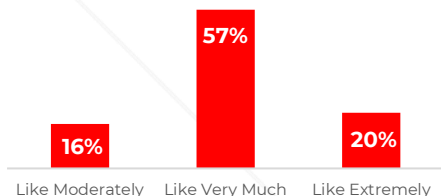
n=694



54% (29% May '21)



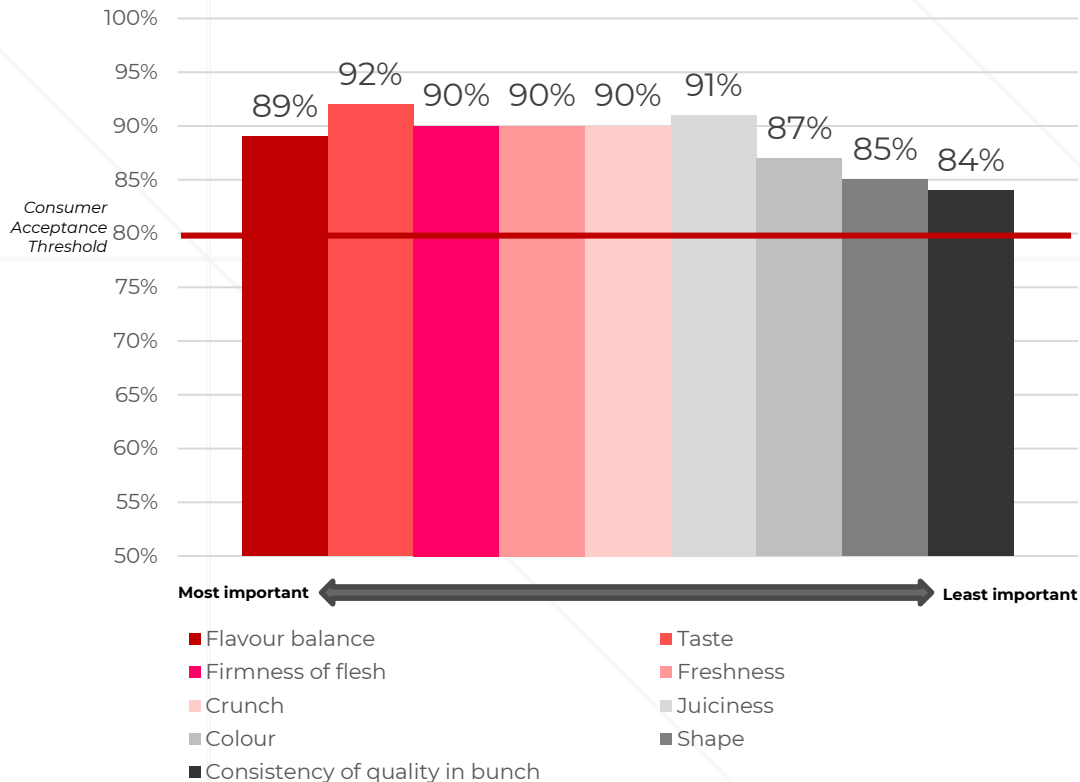
Consumer acceptance = 94%



Q1. Were the grapes you bought green, red or black?

Q2. Please indicate how much you liked or disliked the grapes you bought?

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IGA a consistently strong performer on red grapes

Performance in NSW recovered from a relatively weak mid season result

	Coles	Woolworths	ALDI	IGA	Non-Supers
Mar '22	N=262	N=275	N=152	N=54	N=125
Consumer Acceptance	95%	93%	95%	100%	96%
Average Score	7.8	7.7	7.8	8.0	7.9
May '22	N=455	N=503	N=239	N=83	N=232
Consumer Acceptance	95%	93%	95%	96%	95%
Average Score	7.9	7.8	7.9	7.9	7.8
	NSW	VIC	QLD	SA	WA
Mar '22	N=137	N=87	N=74	N=37*	N=60
Consumer Acceptance	93%	92%	91%	95%	98%
Average Score	7.6	7.8	7.7	7.7	8.0
May '22	N=235	N=162	N=175	N=61	N=41*
Consumer Acceptance	94%	93%	92%	95%	100%
Average Score	7.9	7.7	7.9	7.9	7.9

○ Significantly lower than Total

○ Significantly higher than Total

Consumer acceptance of black grapes has improved slightly and has been the most consistent performer over the 2021-2022 season

Consistency of quality may well be constraining overall performance compared to last season

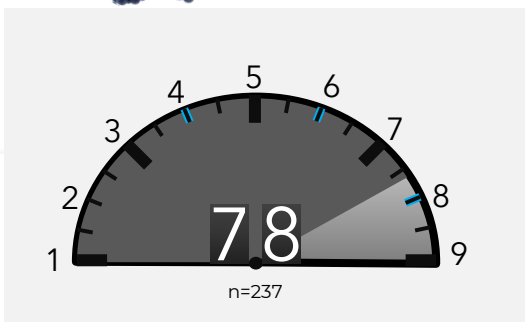
May 22

Percentage of shoppers purchasing...

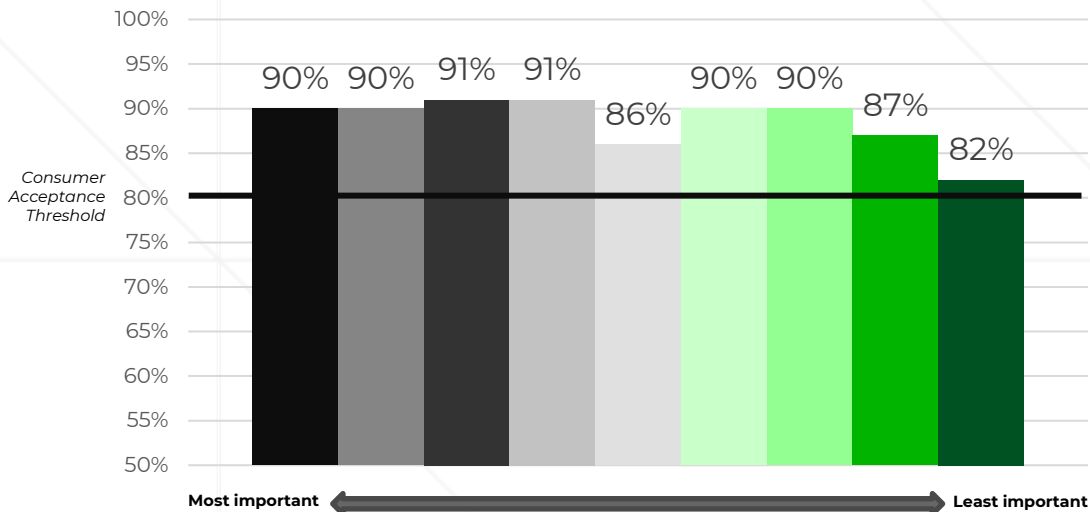
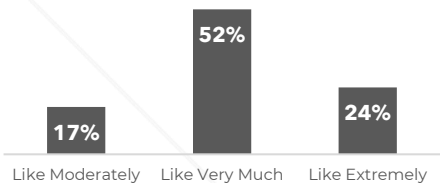
n=237



18% (19% March '22)



Consumer acceptance = 92%



- Taste
- Juiciness
- Shape
- Crunch
- Consistency of quality in bunch
- Flavour balance
- Firmness of flesh
- Colour
- Freshness

Q1. Were the grapes you bought green, red or black?
 Q2. Please indicate how much you liked or disliked the grapes you bought?
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A slight decline noted for ALDI with non-supers remaining strong

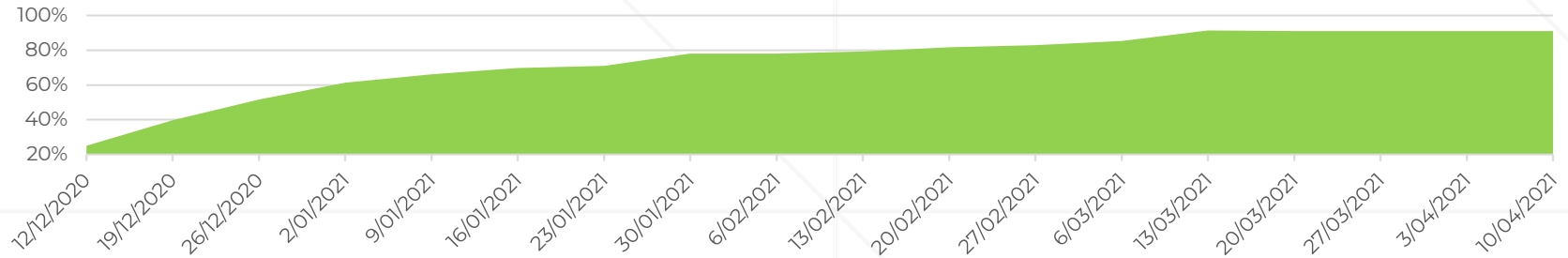
NSW and QLD recovered from relatively poor mid season rating of black grapes

	Coles	Woolworths	ALDI	IGA	Non-Supers
Mar '22	N=177	N=196	N=105	N=38*	N=95
Consumer Acceptance	90%	92%	92%	94%	94%
Average Score	7.6	7.8	7.9	7.8	7.9
May '22	N=140	N=175	N=94	N=24*	N=78
Consumer Acceptance	91%	90%	89%	93%	97%
Average Score	7.8	7.8	7.8	7.7	8.0
	NSW	VIC	QLD	SA	WA
Mar '22	N=82	N=49	N=72	N=24*	N=46*
Consumer Acceptance	88%	93%	86%	100%	97%
Average Score	7.5	7.8	7.6	7.9	7.9
May '22	N=84	N=53	N=64	N=21*	N=8*
Consumer Acceptance	95%	83%	96%	96%	92%
Average Score	7.8	7.7	8.0	7.9	7.7

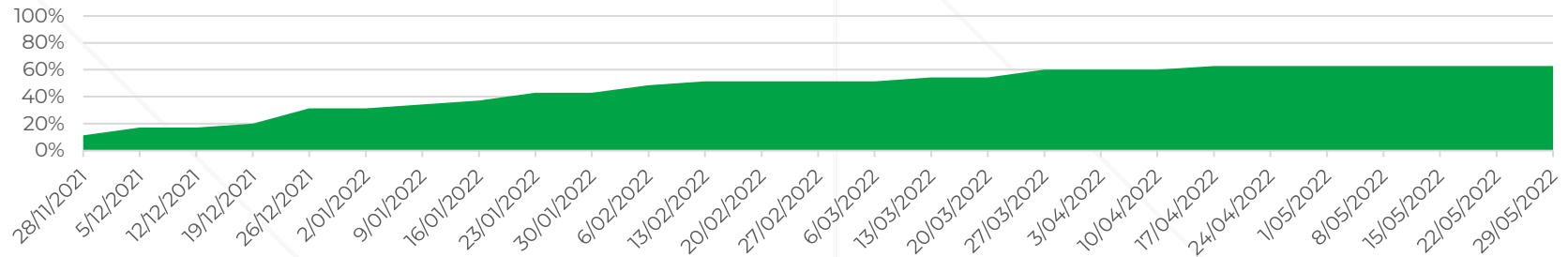
○ Significantly lower than Total

○ Significantly higher than Total

During the 2020-2021 season, almost all that had a bad experience returned at some point during the season (91%). This season it is significantly lower (63%)



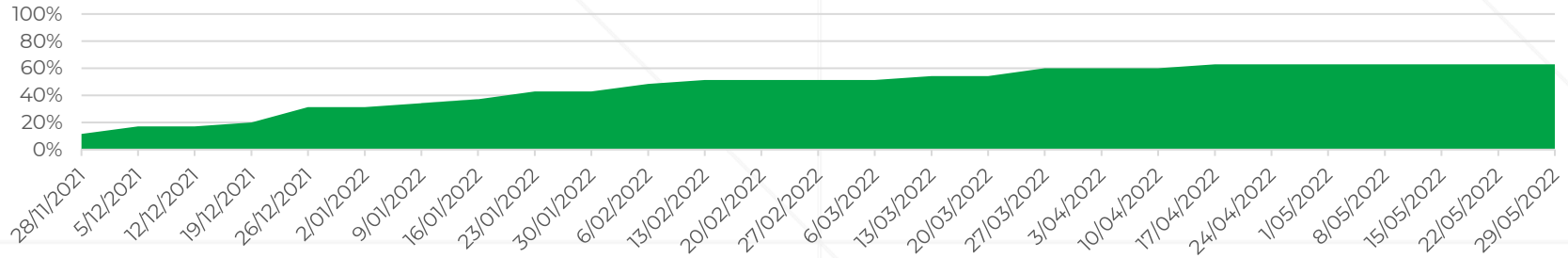
Returned Australian Grape Buyers 2020-21



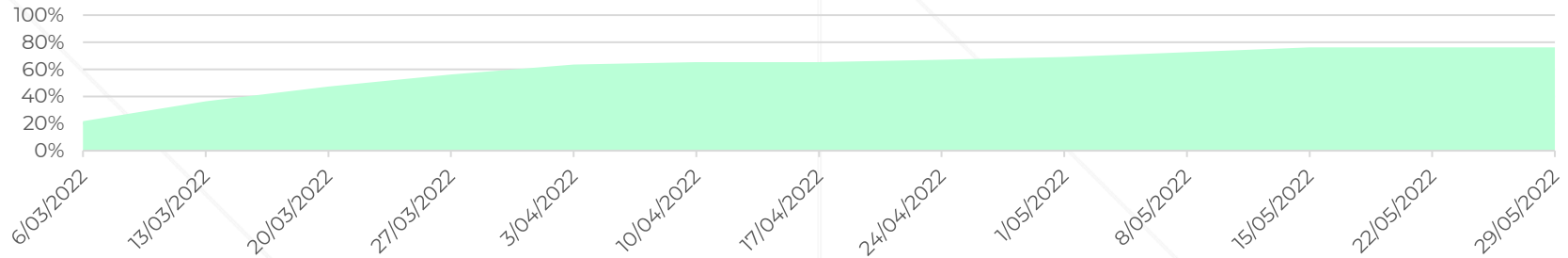
Returned Australian Grape Buyers 2021-22

Homescan panel tracking of n=83 households that rated the grapes they bought in December 2020 as below KPI levels vs December 2021 n=35 households

And only a slightly better return rate noted for those households that reported a bad grape experience during March 2022 (76%)



■ Returned Australian Grape Buyers 2021-22



■ Returned Australian Grape Buyers 2021-22

Homescan panel tracking of n=35 households that had a bad experience in December 2021 vs n=55 that had a bad experience at March 2022



About NielsenIQ

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