

AUSTRALIAN MUSHROOMS CAMPAIGN TRACKING

1. THE STORY SO FAR

In October 2015, a comprehensive research project was conducted to identify the **big opportunities to drive growth** for mushrooms. This research identified two big opportunities;

1. **Primary Opportunity:** Empowering **disengaged cooks** to use mushrooms in a wide variety of everyday meals.
2. **Secondary Opportunity:** Helping highly **engaged cooks** incorporate more mushrooms in each everyday dish.

Since the campaign has launched, we have found areas to optimise and enhance the creative strategy and media mix. In the last research, we identified two important issues and challenges to be addressed.

- Strong recall for spend but needed to reach more people: Previous research indicated that

we have relatively high campaign recall for the amount invested but we need to reach more people in order to significantly increase volume further, particularly during off-peak periods.

- Message hierarchy needs to be 'flipped': Key message take outs were heavily skewed towards health rather than taste and ease. Our opportunity research conducted in 2015 highlighted the need to focus on taste and ease to reach our target opportunity groups given that health, while extremely important, does not differentiate mushrooms from other categories.

The latest campaign since revised both the media strategy (greater focus on digital channels and radio) as well as revising messages in all campaign executions to drive the taste and ease themes. Our research among general consumers helps

evaluate the campaign and provide further direction on how it can continue to be improved to impact sales and consumption frequency.

2. HOW WE EVALUATE THE MUSHROOM COMMUNICATION STRATEGY

A quantitative approach to evaluating and optimising the strategy

15-minute online survey of home cooks – covering both our primary and secondary targets. This stage asked consumers if they had seen the campaign, [and if so] where they had seen it, and the key message they got out of the campaign. Regardless of whether they had seen the campaign or not, we presented the campaign and asked a range of questions to better understand what might drive consumption.

Key messages of taste and ease are being clearly delivered across the campaign

Unprompted Message Take Out: Total campaign



Taste 38%
Ease 33%
Health 18%

“Mushrooms are versatile, **tasty** and **easy** to incorporate in meals”

“Mushroom are **easy** to cook and easy to prepare. They also makes your meal **tastier.**”

“Its **easy** to add mushrooms to a variety of meals to make them **tastier**”

“**Easy** and **nutritious** - good for the whole family”

MESSAGES REGARDING THE HEALTH BENEFITS MUSHROOMS PROVIDE ARE ALSO PULLING THROUGH, BUT TO A LESSER EXTENT

3. WHAT WE FOUND: THE MUSHROOM LANDSCAPE

- Campaign Recall**

Prompted awareness of the campaign this wave [wave 8 - Nov 19] was 17%. Awareness is slightly [but not significantly] lower than the previous wave [compared to 21% in wave 7 in April 2019] however it is a similar level to awareness levels in wave 6 [19% in September 2018] indicating time of year could influence awareness levels, potentially because of increased advertising clutter during the end of year period.

However, our framework that looks at drive, i.e. conversion from awareness to other key performance indicators shows that we are ahead of benchmarks/norms in terms of comprehension and motivating purchase. This suggests that the creative underpinning the campaign is effective, however there is room to improve reach of the campaign.

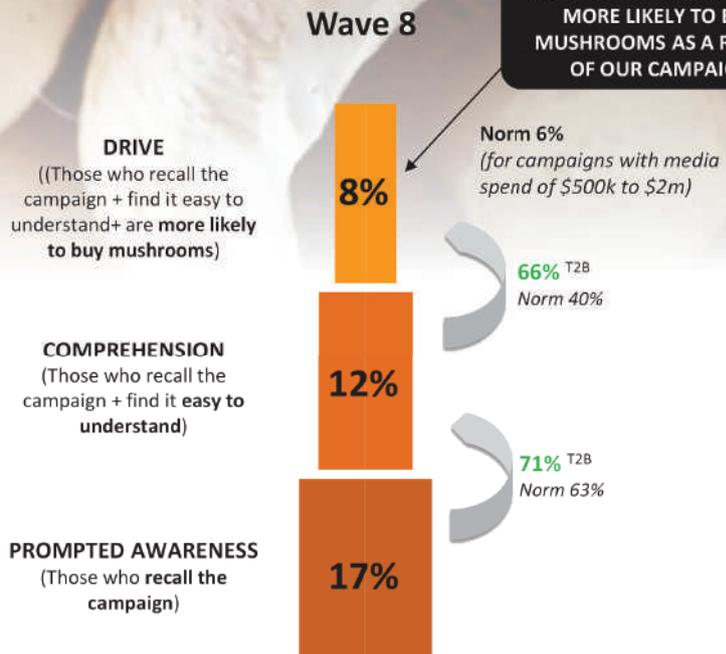
- Campaign Messaging**

We asked those who recalled seeing the campaign what they thought the main message was. We found that this wave of tracking showed that taste and ease were the most common main message outcomes. This coincides with an indicative increase in the proportion of respondents who claim the campaign is effective at driving purchase intent [vs. the last wave of tracking]. Messaging is particularly effective in television advertising however all channels perform above tracking norms in terms of message comprehension.

- Impacting Attitudes to Mushrooms**

We have maintained key brand associations during this campaign. In total 87% of cooks stated mushrooms were quick and easy to prepare, with 85% highlighting that they are delicious and help add richness/depth of flavor to a meal. From a messaging point of view, there is potential to further drive the message around ease, as well as reinforcing the 'taste/flavour' within the vegetable category.

Category momentum and purchase frequency is continuously improving which creates a big opportunity



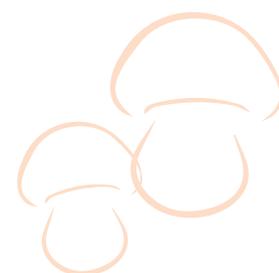
to promote new ways to include mushrooms into existing meals or alternatively as a meat substitute. Mushroom purchase frequency has returned to early 2018 levels, with consumers purchasing mushrooms four times a month on average [vs 3.6 times a month in April 2019]. For those consumers that state they are purchasing mushrooms more often than they used to, the top reason is that they have cooked new recipes that have included mushrooms. As such, recipe inspiration through channels such as social media remain key to driving consumption.

4. WHAT DOES THIS ULTIMATELY MEAN?

- Increasing awareness and optimising media mix** – Evidence shows the campaign message is compelling and motivating. Television was an effective channel when it came to driving behaviour as it is a powerful media for delivering the message of taste and ease. However, there is still a role to play for digital, out-of-home [OOH], and radio as they are effective at continuing this message [driving frequency] and prompting behaviour, especially near point of sale [OOH]. It is

important that we continue to optimise the media channel mix to ensure we achieve of balance of message effectiveness, reach, as well as ensuring that audience see the campaign often.

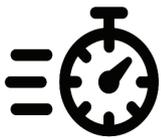
- Need to maintain the message hierarchy** – Taste is one of the key drivers for including mushrooms in meals. The current messaging is helping mushrooms move towards owning this attribute in the vegetable category. Ease is the other key driver – which can be both a push and pull factor of mushroom use. By focusing on the ease and speed of preparation, we need to continue to drive home how simple it is to include mushrooms in home cooked meals as part of the main messaging.



Mushrooms continue to be held in high regard, with the majority agreeing they are quick/ easy to prepare, delicious, different and versatile

Attitudes to mushrooms – Top Performing

Mushrooms are quick and easy to prepare



87%

Mushrooms add a unique flavor to every meal



85%

Mushrooms are delicious



85%

Mushrooms are different to other vegetables



83%

Mushrooms are versatile



82%

Mushrooms make any meal much healthier

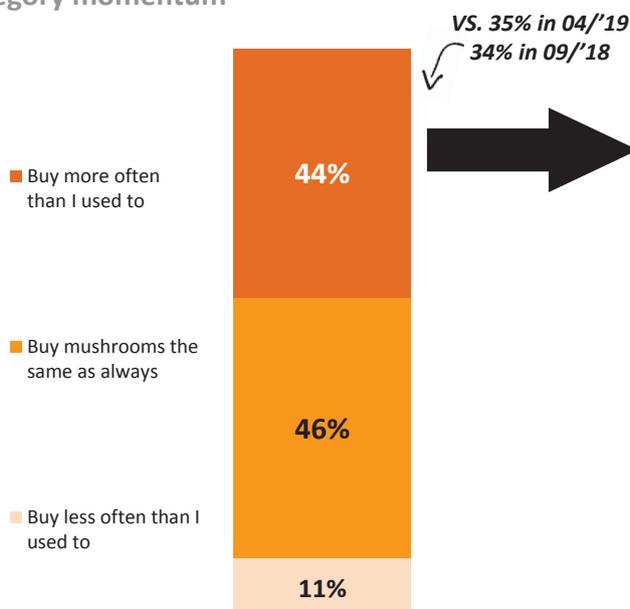


82%

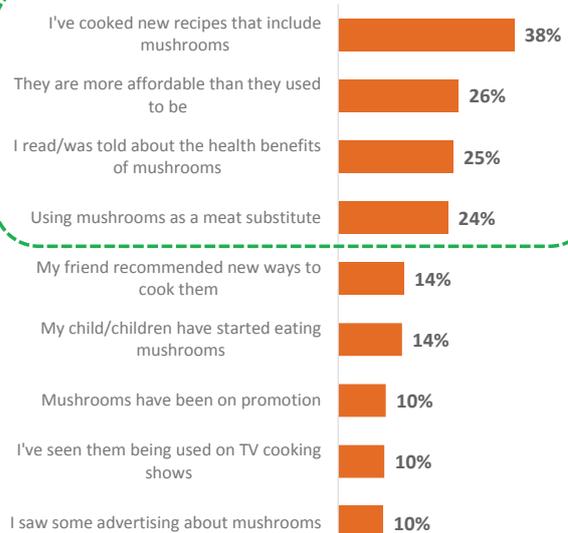
FIGURES ABOVE 75% SHOW A STRONG CATEGORY IDENTITY

Signs that purchase frequency is growing, driven by new recipes, affordability, health benefits and a meat substitute

Category momentum



REASON FOR PURCHASING MORE OFTEN



THE POWER OF NEW RECIPES AS A MOMENTUM DRIVER SHOWS THERE IS A STRONG ROLE FOR DIGITAL

Hort Innovation
Strategic levy investment

MUSHROOM FUND

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