

INTERNATIONAL  
**FRESH  
PRODUCE**  
ASSOCIATION

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**2024 United Kingdom**

**Produce Industry Brand**

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## **Who we are:**

International Fresh Produce Association (IFPA) is the leading global trade association representing companies in the fresh produce and floral supply chain.

## **We are here to:**

- advocates for members and industry;
- connects individuals and organizations with ideas, data and with each other;
- guides with education, insight, expertise, and solutions.



## Produce Industry Branding

In today's fast-paced world, people turn to quick, convenient meals and snacks. But where will they look tomorrow? The fruit and vegetable industry's brand is vital in capturing consumers' attention and preference.

**Why it matters:** Understanding our brand is crucial. By resonating with consumers, we can increase our share of stomach and compete against other grocery store products.

**The big picture:** A brand is shaped by consumer perception and every aspect of the industry. And to win the food fight, fruits and vegetables must compete with various grocery store sections.

**The bottom line:** Consumer feedback helps us understand brand perception and increases our share of stomach.



## Understanding Brand Perception

Brand perception is crucial in developing relationships with customers and winning their loyalty.

**Why it matters:** Consumers always consider their emotional connection when choosing between items that fulfil a similar purpose whether it be hunger in the produce category or indulgence in the floral category.

**The big picture:** Understanding the personality and attributes of our industries helps us connect with consumers.

**The bottom line:** Leverage industry personality and attributes to help shape your brand perception with consumers.



# A guide for marketers

## What this research tell us:

- While the reputation of the produce industry is strong for businesses to build their messaging.
- The produce industry is seen as dynamic by half of consumers so we can benefit by demonstrating innovations in breeding and growing as well as showing produce in modern settings.
- Produce marketing can build off the industry's personality of being consistent and trustworthy– “fruits and vegetables should be the highlight of every meal.”
- There is an opportunity to build on “creates products worth paying for.” This matters to consumers, yet the produce industry is not leveraging these attributes.
- Promoting individual and public health will benefit the produce industry.
- Highlighting the trustworthiness of the industry will help attract Gen Z as talent.



# Our Research Methodology

The study was conducted using an online methodology, with all fieldwork conducted on the Russell Research survey website.

A total of 4,533 interviews were conducted from February 9 – 28, 2024.

To qualify for study inclusion, respondents were screened to meet the following qualifications:

- Age 18 - 78
- Primary or shared responsibility for purchasing groceries for household
- Purchase groceries once a month or more often
- Typically purchase groceries at a supermarket/grocery store or online retailer
- Reside within the United States, Brazil, the United Kingdom, Germany, China or Australia
- Does not work in a competitive industry

All research was carried out in compliance with all relevant legal and ethical requirements within the United States and in compliance with ISO 20252:2019.



# United Kingdom Summary

- Consumer impressions of the fruit and vegetable industry were positive on their own and compared to benchmarks (higher than other industries except Grocery where there is parity).
  - Nearly 8 in 10 consumers have a favorable impression
  - Over half of consumers believe the industry is ‘on its way up’ while the balance believe its ‘holding its ground’. Industry Momentum ratings are higher than Floral, Dairy, and Meat.
  - The Fruit and Vegetable industry is the most well regarded vis-à-vis competitive benchmark industries with nearly three in four consumers describing it as very/somewhat favorable.

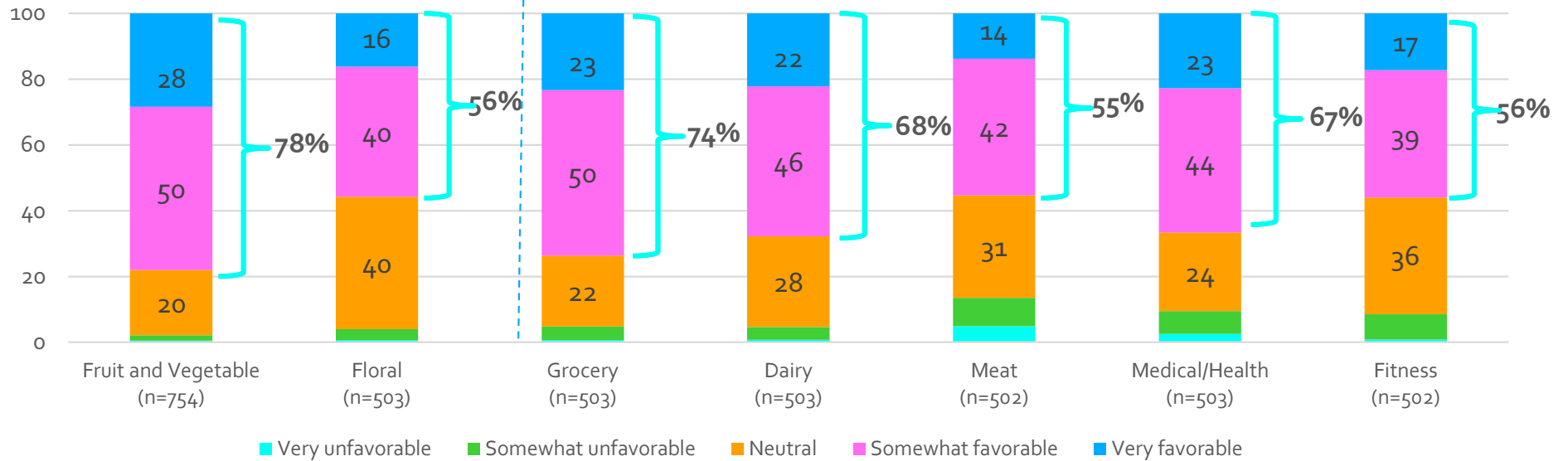
Fruit & Veggie Industry	Fruit & Veggie Industry Personality Traits
<ul style="list-style-type: none"><li>• Promotes both public <u>and</u> individual health</li><li>• Mindful of the environment</li><li>• Makes room for a wide variety of brands</li></ul>	<ul style="list-style-type: none"><li>• Trustworthy</li><li>• Consistent</li><li>• Friendly</li><li>• Simple</li></ul>

- A relative importance analysis indicates it would be beneficial to communicate the industry *Creates products or services worth paying extra for.*



**Most consumers have a favorable impression of the produce industry. This impression is better than any of the benchmarked industries.**

Overall Industry Impressions



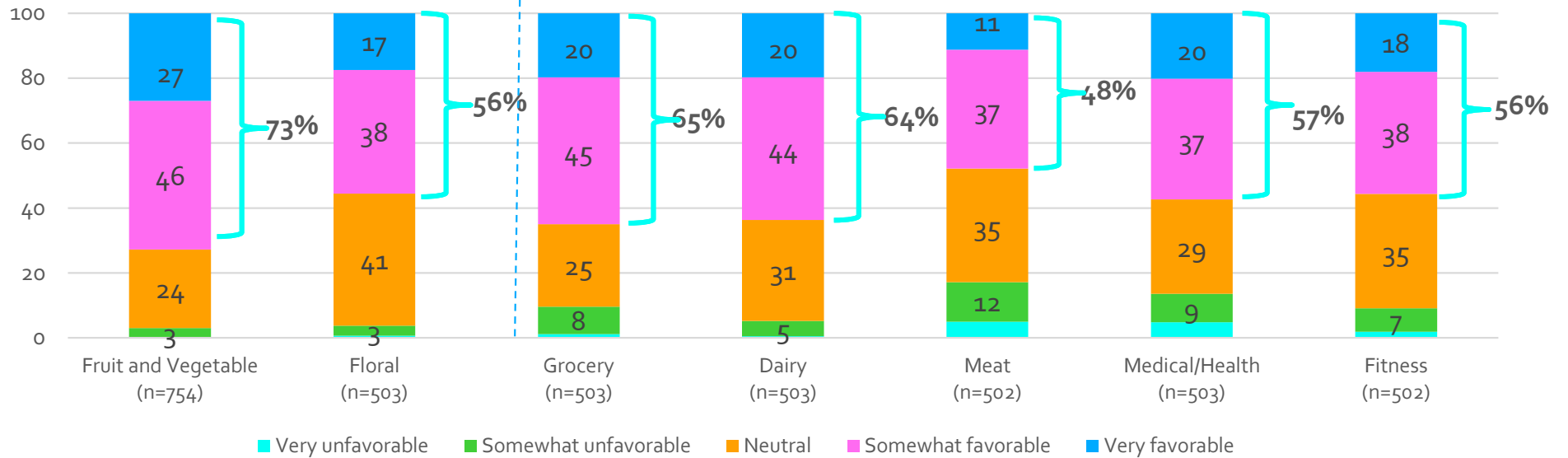
Base: Total UK Respondents Evaluating Industry  
 3. What is your overall impression of the [INSERT INDUSTRY]?





**The produce industry has a positive reputation which is stronger than the benchmarked industries.**

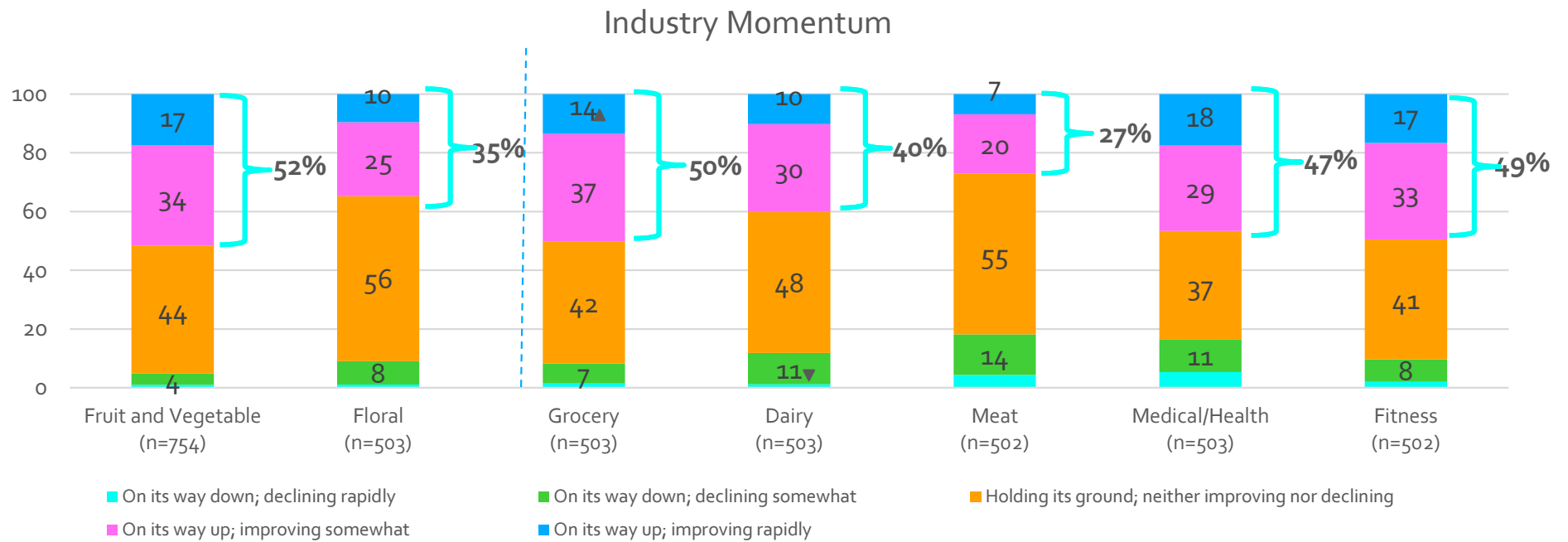
Industry Reputation



Base: Total UK Respondents Evaluating Industry  
 6. Which of the following best describes what you feel is the current reputation of the [INSERT INDUSTRY]?



**Just over half of consumers see the produce industry as dynamic which is more than the benchmarked industries. This provides an opportunity to market innovation, technology and diversity within the industry.**



Base: Total UK Respondents Evaluating Industry

5. When you think about certain industries, some seem to be on their way up and have a lot going for them, while others don't. Which of these statements best describes how you feel about the [INSERT INDUSTRY]?





# Industry Drivers United Kingdom



## Relative Importance for Produce Industry

### Relative Importance

#### What is it?

It is an extension of regression analysis that allows us to assess which attributes are most important and exactly how much more important one is than another.

#### The most important factors to U.K. consumers when evaluating the produce industry are:

Promotes individual health  
 Creates products or services worth paying extra for  
 Makes room for a wide variety of brands  
 Is mindful of the environment

	Relative Importance	Rank Order
Total UK Respondents	(754)	
Promotes individual health	12.31	1
Creates products or services worth paying extra for	8.91	2
Makes room for a wide variety of brands	8.68	3
Is mindful of the environment	8.09	4
Promotes public health	8.01	5
Is trustworthy	7.62	6
Offers affordable options	6.46	7
Values diversity, equity and inclusion	6.02	8
Helps solve some of society's most pressing problems	5.81	9
Is transparent in its production/service methods	5.74	10
Adapts quickly to meet the needs of consumers	5.69	11
Treats employees fairly	4.25	12
Is innovative	4.00	13
Offers unique products and experiences	3.49	14
Attracts top talent	2.81	15
Uses technology wisely	2.10	16



## Stated vs. Relative Importance

The results of the Relative Importance Analysis are compared to what consumers state is important to them and plotted on a quadrant map. From this map, three important groupings of attributes are defined as follows:

### Critically Important

(High Relative / High Stated Importance)

- **These are strong positioning attributes if an industry can deliver in these areas.**
  - ✓ Is trustworthy
  - ✓ Offers affordable options
  - ✓ Is mindful of the environment
  - ✓ Makes room for a wide variety of brands

### Hidden Opportunities

(High Relative / Low Stated Importance)

- **These drivers may not be expressed but are important positioning attributes.**
  - ✓ Promotes individual health
  - ✓ Promotes public health
  - ✓ Creates products or services worth paying extra for

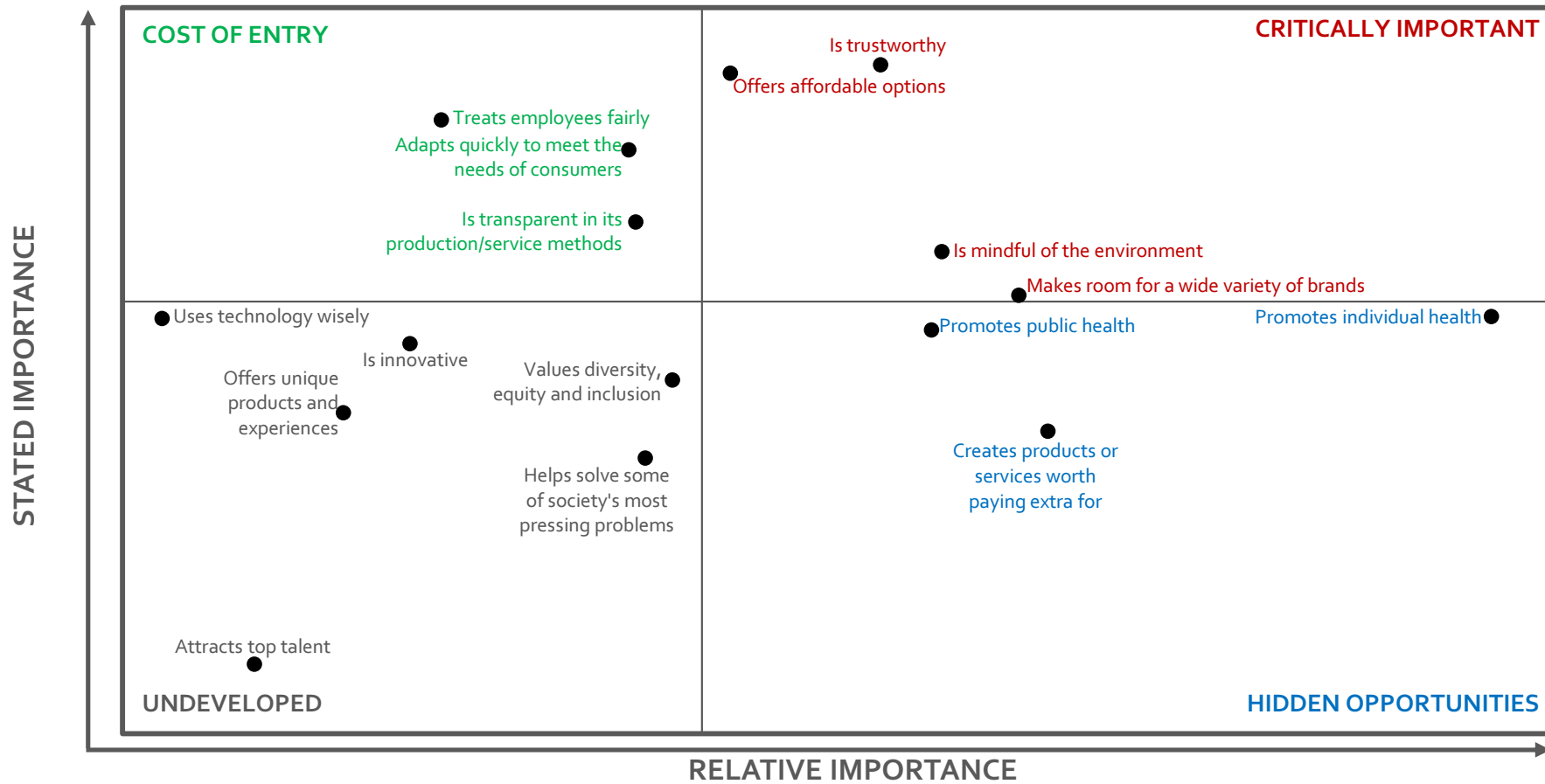
### Cost of Entry

(Low Relative / High Stated Importance)

- **These are important for all category industries to deliver. They are necessary but provide no leverage.**
  - ✓ Treats employees fairly
  - ✓ Adapts quickly to meet the needs of consumers
  - ✓ Is transparent in its production/service methods



# Stated vs. Relative Importance – UK Produce Industry



## Industry Descriptor Agreement Ratings (Top-Two Box Ratings: Agree Completely/Somewhat)

### Consumers were most likely to agree that the produce industry:

*Offers affordable options,  
Promotes both public and individual health  
Mindful of the environment  
Makes room for a wide variety of brands.*

	Fruit and Vegetable	Floral	Grocery	Dairy	Meat	Medical/ Healthcare	Fitness
Total UK Respondents Evaluating Industry	(754)	(503)	(503)	(503)	(502)	(503)	(502)
	%	%	%	%	%	%	%
Offers affordable options	82	65	86	80	63	61	56
Promotes individual health	81	39	71	70	54	82	82
Promotes public health	79	37	68	71	51	85	81
Is mindful of the environment	77	65	66	66	49	56	49
Makes room for a wide variety of brands	77	62	88	71	62	68	58
Is trustworthy	75	67	70	73	60	70	61
Adapts quickly to meet the needs of consumers	71	62	78	68	63	73	70
Is transparent in its production/service methods	66	58	63	66	51	57	56
Creates products or services worth paying extra for	64	62	68	65	57	59	56
Offers unique products and experiences	63	64	72	61	55	69	68
Is innovative	59	55	69	59	49	75	70
Values diversity, equity and inclusion	59	55	68	56	46	66	64
Helps solve some of society's most pressing problems	59	37	55	49	39	77	53
Treats employees fairly	58	51	68	57	52	58	55
Uses technology wisely	52	42	68	58	46	74	66
Attracts top talent	44	42	48	45	38	68	52



2. Thinking about the [INSERT INDUSTRY], how much do you agree or disagree that the following attribute describes this industry?

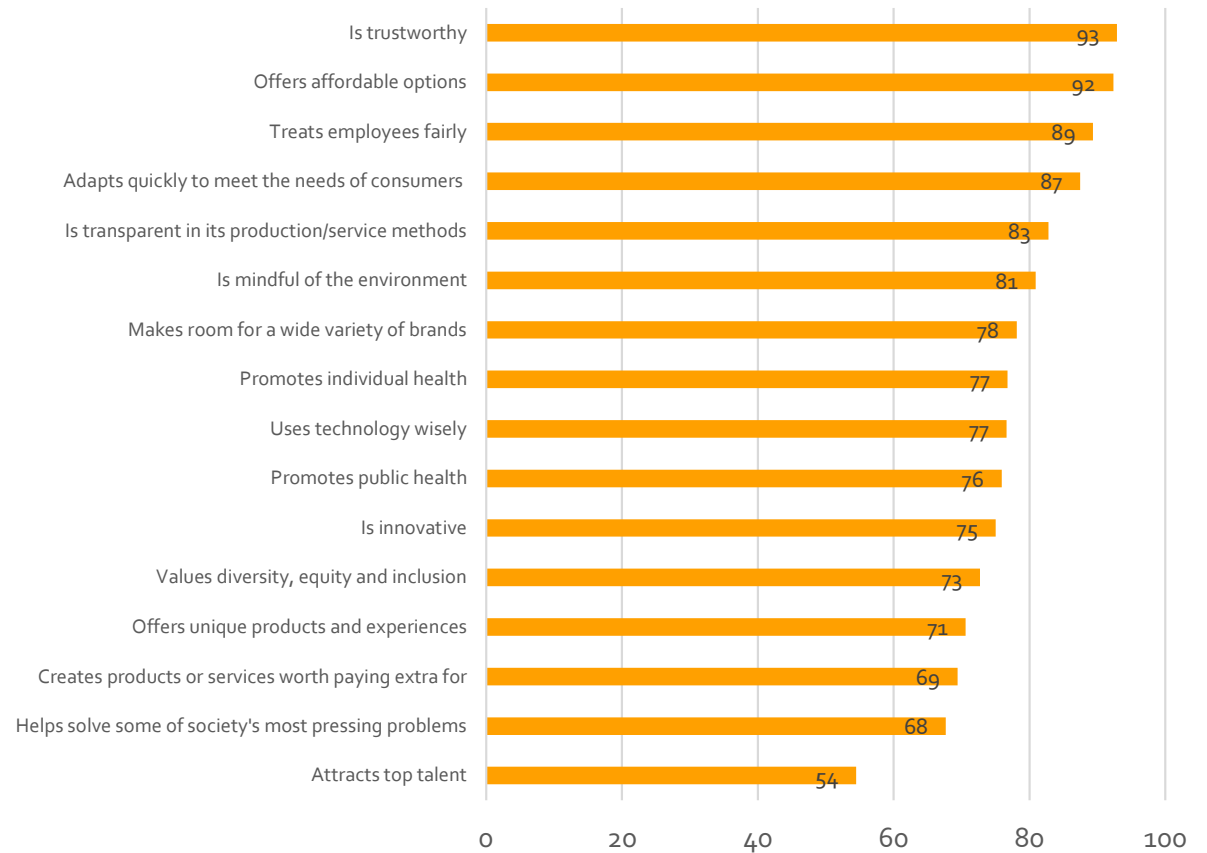


## When thinking about any type of industry...

U.K. consumers place the highest importance on

*Trustworthiness*  
*Offers affordable options*  
*Treats employees fairly*  
*Adapts quickly to meet the needs of consumers*

Stated Importance for Any Industry  
(Top-Two Box Ratings: Extremely/Very Important)



Base: Total UK Respondents (n=754)

1. How important is it to you that any type of industry ...?





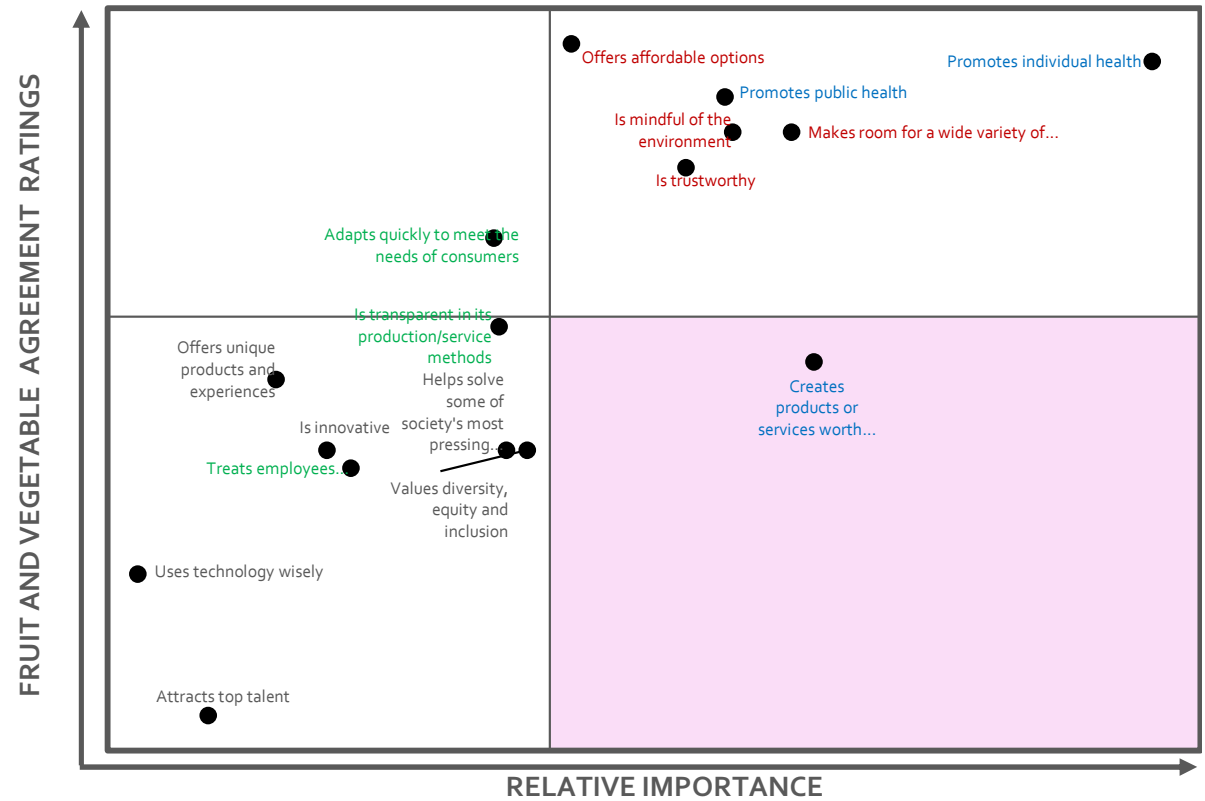
The relative importance of each statement and respondents' agreement that the industry portrays that statement was plotted on this map.

Attributes on the right side are most important to respondents.

Attributes appearing in the lower right quadrant need the greatest attention—they are high in relative importance but rated low for the industry.

**The UK produce industry has an opportunity message on products worth paying for.**

## Relative Importance vs. Produce Agreement R





AI Chosen Image to Depict Produce Industry

## Produce Industry Personality

	Fruit and Vegetable	Floral	Grocery	Dairy	Meat	Medical/Healthcare	Fitness
Total UK Respondents Evaluating Industry	(754)	(503)	(503)	(503)	(502)	(503)	(502)
	%	%	%	%	%	%	%
Trustworthy	40	23	35	35	26	41	24
Consistent	37	19	37	39	32	30	23
Friendly	35	40	37	28	18	22	27
Simple	34	19	29	30	18	8	8
Approachable	30	25	34	28	18	25	24
Honest	29	21	23	29	17	28	14
Expert	28	28	26	33	30	54	33
Classic	28	34	23	30	27	12	8
Confident	24	22	30	23	26	36	40
Budget-Conscious	21	7	30	18	14	13	5
Modern	18	21	32	19	18	29	41
Accepting	17	15	19	19	14	22	20
Exotic	17	28	5	3	3	2	4
Fun	15	31	13	9	6	4	31
Casual	13	11	16	12	11	6	13
Adventurous	12	15	13	10	8	9	25
Trendy	10	20	13	5	4	3	36
Formal	7	16	7	10	9	21	4
Boring	4	3	4	4	6	3	7
Outdated	3	6	3	7	10	6	4
Uptight	2	3	4	2	5	8	7



4. Imagine for a moment the [INSERT INDUSTRY] was a person. What types of words and/or descriptions would you use to describe that person? Please select as many or as few adjectives and/or descriptors you'd like.



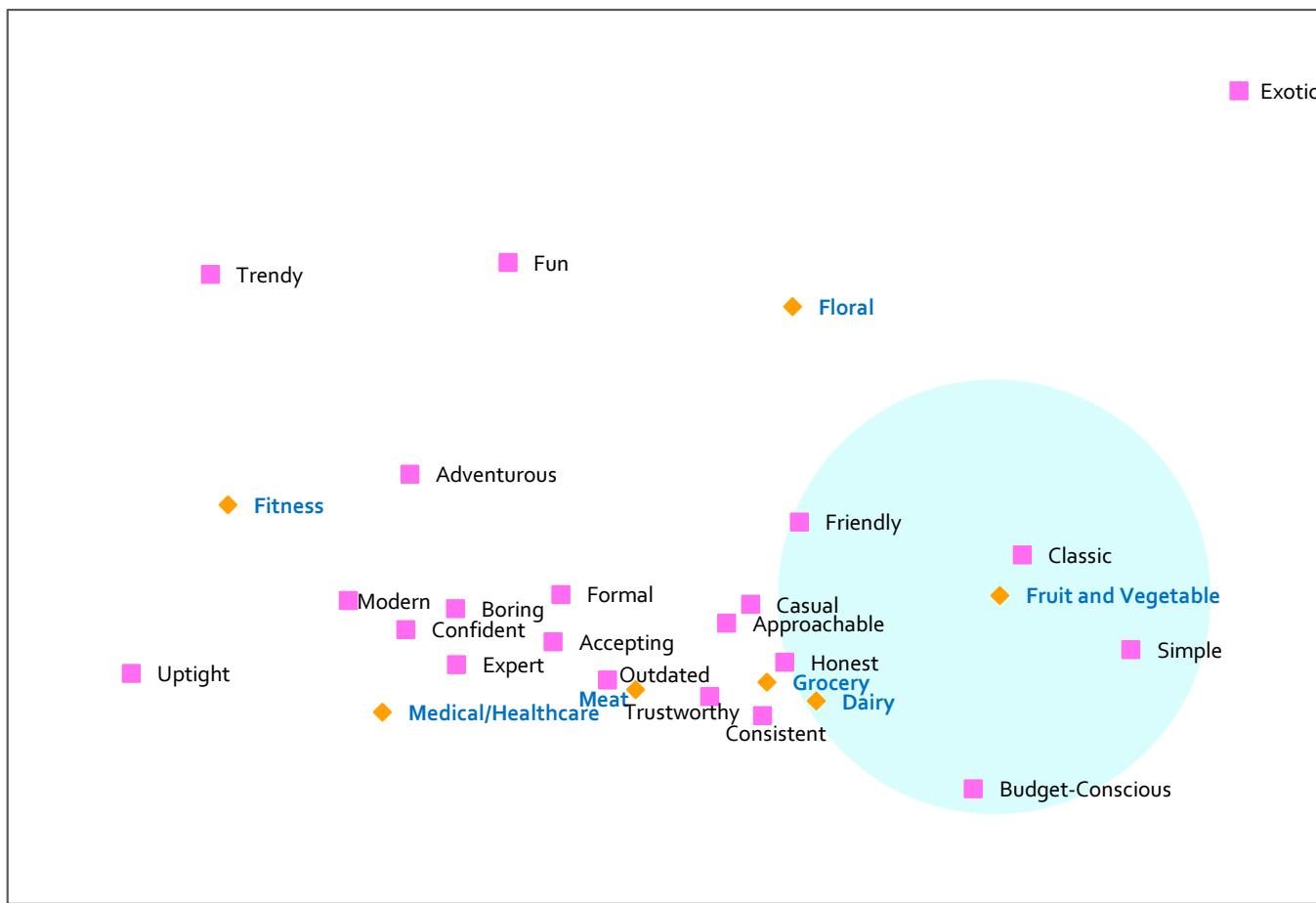
# Industry Personality Correspondence Map

## Correspondence analysis

### What it is:

A mapping technique that allows us to determine which industry attributes are most differentiating for and which attributes would need to be changed to move industry perceptions closer or farther from another industry.

Industries and attributes that are rated similarly are placed close to each other on the map, while those that are rated differently will appear in a different area of the map.



## Produce Industry Findings By Key Segments

Boomers hold the most positive regard toward the Fruit and Vegetable industry.

	Total UK	Gender		Generation				Income	
		Male	Female	Gen Z	Millennials	Gen X	Boomers	Under £40,000	£40,000 or More
Total UK Respondents	(754)	(308)	(445)	(76)	(198)	(238)	(242)	(459)	(260)
	%	%	%	%	%	%	%	%	%
<b><u>Overall Impression of Industry</u></b>									
Very Favorable	28	27	30	24	32	25	29	29	28
Very/Somewhat Favorable	78	81	75	71	80	76	81	78	78
<b><u>Industry Momentum</u></b>									
On its way up /Improving rapidly	17	17	18	15	19	17	18	18	17
On its way up /Improving rapidly or somewhat	52	53	50	40	52	53	56	51	53
<b><u>Industry Reputation</u></b>									
Very Favorable	27	26	28	17	32	26	28	26	29
Very/Somewhat Favorable	73	75	71	57	73	72	82	72	76



## Produce Industry Findings By Key Segments

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	%	%	%	%	%	%	%	%	%
Offers affordable options	82	80	84	86	80	79	86	79	86
Promotes individual health	81	82	81	80	81	82	82	81	84
Promotes public health	79	79	79	77	79	77	82	78	81
Is mindful of the environment	77	77	77	77	77	73	81	76	78
Makes room for a wide variety of brands	77	80	73	71	79	73	81	75	79
Is trustworthy	75	75	74	80	70	74	78	73	76
Adapts quickly to meet the needs of consumers	71	68	74	70	73	69	71	70	73
Is transparent in its production/service methods	66	67	64	64	69	66	63	64	70
Creates products or services worth paying extra for	64	64	64	64	72	60	60	61	69
Offers unique products and experiences	63	65	60	63	69	59	60	63	61
Is innovative	59	60	59	61	59	59	59	61	58
Values diversity, equity and inclusion	59	62	56	67	65	56	50	57	61
Helps solve some of society's most pressing problems	59	62	56	65	61	58	54	59	60
Treats employees fairly	58	59	57	61	67	55	48	56	60
Uses technology wisely	52	56	48	48	56	56	46	50	54
Attracts top talent	44	45	42	49	55	42	30	43	44



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	%	%	%	%	%	%	%	%	%
Trustworthy	40	44	37	36	35	40	50	42	40
Consistent	37	36	37	28	30	39	47	39	34
Friendly	35	37	33	38	27	38	38	34	36
Simple	34	36	33	39	30	36	34	36	32
Approachable	30	32	28	28	26	29	35	28	33
Honest	29	32	26	22	20	35	37	27	32
Expert	28	30	26	20	20	25	44	30	25
Classic	28	27	28	26	24	30	30	27	30
Confident	24	25	23	22	18	24	31	27	22
Budget-Conscious	21	18	23	15	17	20	28	23	18
Modern	18	21	16	22	14	20	19	20	16
Accepting	17	18	16	21	15	17	17	16	19
Exotic	17	13	20	26	18	13	15	17	17
Fun	15	15	14	21	15	11	15	16	13
Casual	13	14	12	17	15	12	11	14	13
Adventurous	12	12	12	13	14	10	10	12	12
Trendy	10	9	11	17	7	10	9	11	9
Formal	7	9	5	12	8	5	4	7	6
Boring	4	6	3	8	4	3	3	4	5
Outdated	3	3	4	6	4	2	3	3	5
Uptight	2	2	3	4	3	1	1	2	2



## Shopping Habits

	Total UK	Gender		Generation				Income	
		Male	Female	Gen Z	Millennials	Gen X	Boomers	Under £40,000	£40,000 or More
Total UK Respondents	(754)	(308)	(445)	(76)	(198)	(238)	(242)	(459)	(260)
	%	%	%	%	%	%	%	%	%
<b>Responsibility for Grocery Purchases</b>									
Primarily responsible	74	68	79	63	82	78	67	74	73
Share responsibility	26	32	21	37	18	22	33	26	27
<b>Frequency of Purchasing Groceries</b>									
Several times per week	44	42	45	33	46	48	43	42	49
Once a week	46	49	43	50	45	43	46	46	45
2 to 3 times per month	9	8	10	15	7	7	9	10	6
Once a month	2	1	2	2	1	2	2	2	0
Mean times per month:	5.8	5.8	5.8	5.2	5.9	6.0	5.8	5.7	6.1
<b>Groceries Purchase on a Regular Basis</b>									
Fresh produce (fruits and vegetables)	95	95	96	94	94	94	99	94	98
Dairy milk	93	93	93	93	94	92	94	92	96
Beef and/or poultry	86	89	84	84	86	85	90	85	90
Fresh flowers	26	21	30	33	25	23	25	21	35



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	%	%	%	%	%	%	%	%	%
<b>Typical Grocery Purchase Locations *</b>									
Supermarket/Grocery Store	93	93	94	89	97	92	93	93	94
Online retailer	32	33	31	39	33	37	23	28	40
Convenience Store	31	35	27	40	40	28	19	31	32
Farmer's Market/Farm Store	9	10	7	15	8	8	7	6	12
Mass Merchandiser	8	11	5	11	12	6	3	6	11
Warehouse Club	5	7	3	8	8	5	1	3	9
Dollar Store	4	3	5	9	5	2	2	4	3
Drug Store	4	4	3	1	7	3	1	4	4

\* Respondents had to purchase from a supermarket/grocery store and/or from an online retailer to qualify for this study.





## Demographic Summary

	Total UK	Gender		Generation				Income	
		Male	Female	Gen Z	Millennials	Gen X	Boomers	Under £40,000	£40,000 or More
Total UK Respondents	(754)	(308)	(445)	(76)	(198)	(238)	(242)	(459)	(260)
	%	%	%	%	%	%	%	%	%
<b>Gender</b>									
Male	49	100	-	40	46	51	55	51	48
Female	51	-	100	60	54	48	45	49	52
<b>Generation</b>									
Gen Z (18 - 26)	15	12	18	100	-	-	-	14	17
Millennials (27 - 42)	30	28	32	-	100	-	-	27	34
Gen X (43 - 58)	28	29	27	-	-	100	-	26	29
Boomers (59 - 78)	27	30	24	-	-	-	100	32	20
Mean Age:	46.0	47.5	44.6	22.6	35.1	51.1	66.0	47.6	43.5
<b>Marital Status</b>									
Married	41	43	40	9	38	47	58	34	55
Not Married	58	57	60	91	62	52	42	66	45
<b>Employment Status</b>									
Employed	63	67	60	65	83	75	29	54	81
Not Employed	36	33	39	33	17	24	71	46	19



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		Male	Female	Gen Z	Millennials	Gen X	Boomers	Under £40,000	£40,000 or More
Total UK Respondents	(754)	(308)	(445)	(76)	(198)	(238)	(242)	(459)	(260)
	%	%	%	%	%	%	%	%	%
<b>Education</b>									
Less than high school	31	30	31	18	19	37	44	36	21
High school	34	37	31	38	32	34	32	35	30
College	36	33	38	44	49	29	23	29	49
Median Annual Household Income:	£33.3K	£33.0K	£33.7K	£35.4K	£35.7K	£34.5K	£29.4K	£24.2K	£59.9K
<b>Region</b>									
South East England	13	11	16	11	15	13	13	14	13
Greater London	12	13	11	20	14	9	8	11	15
North West England	11	10	13	7	9	18	10	11	11
West Midlands	10	12	8	13	11	8	9	10	9
Yorkshire and the Humber	9	10	8	7	7	7	15	10	8
South West England	9	7	11	14	9	10	7	8	10
East of England	9	11	7	6	6	11	12	9	8
Midlands East	9	9	8	10	11	7	8	9	10
Scotland	8	7	8	1	9	8	10	8	8
Wales	4	5	4	6	3	4	6	6	3
North East England	3	3	3	4	4	3	1	2	4
Northern Ireland	2	1	2	-	3	2	1	3	1

