

# Driving Australians' Vegetable Consumption

LEARNINGS FROM THE HORT IQ USAGE AND  
PERCEPTIONS PROGRAM

Hort Innovation Thought Leadership Series

February 2026





800 Australians per month, nationally representative sample. Over **20,000** consumers surveyed since start of the program



15 minute **"always on"** module to capture key attitudes and behaviours, plus **additional 5 min module** on veg consumption drivers and barriers



Speaking to **main / joint grocery buyers** with questions spanning over 30 categories in fruit, veg and nuts



## **What we wanted to understand...**

The keys to unlocking growth in vegetable consumption amongst Australians

## **Why it's important to understand...**

Vegetable consumption is hugely routine; we need to think differently to unlock growth





## Framing the Problem

# **We don't think there is a problem...**

Australians largely think they consume enough vegetables. This is largely driven by a lack of awareness on how many serves they should be eating and what a "serve" actually is.

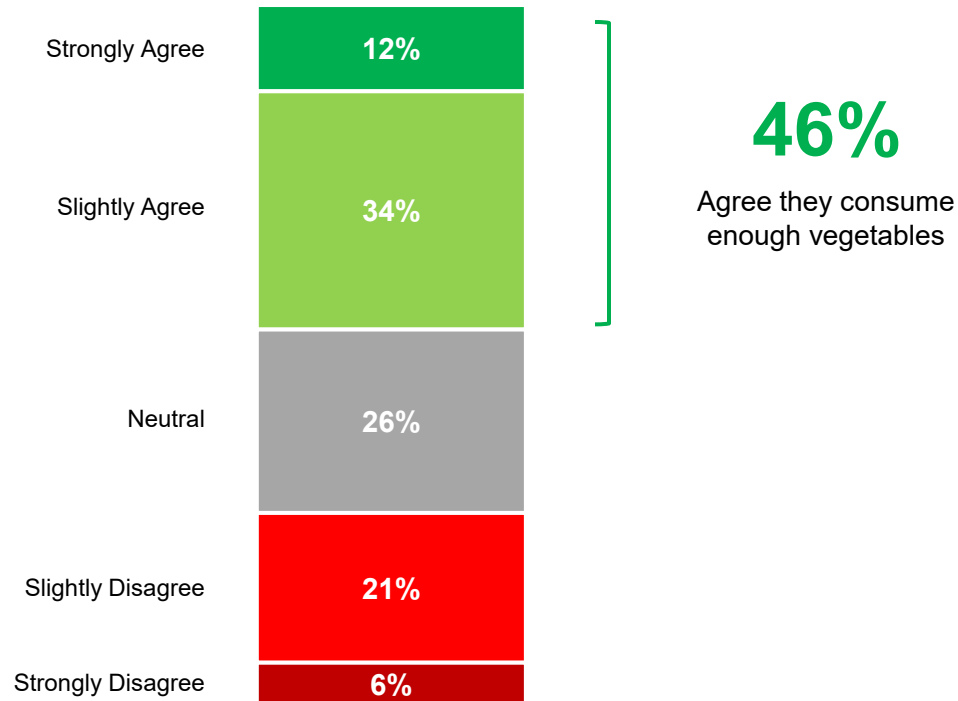


# 1 in 2 Australians think they consume enough; only 1 in 4 don't think they consume enough; for children the issue is worse

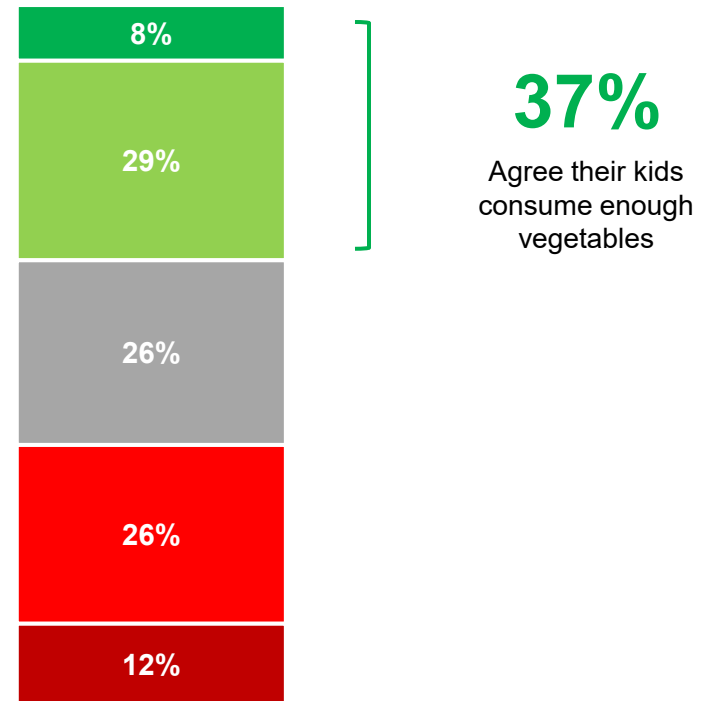


## Attitudes to Vegetable Consumption

“I consume enough vegetables”



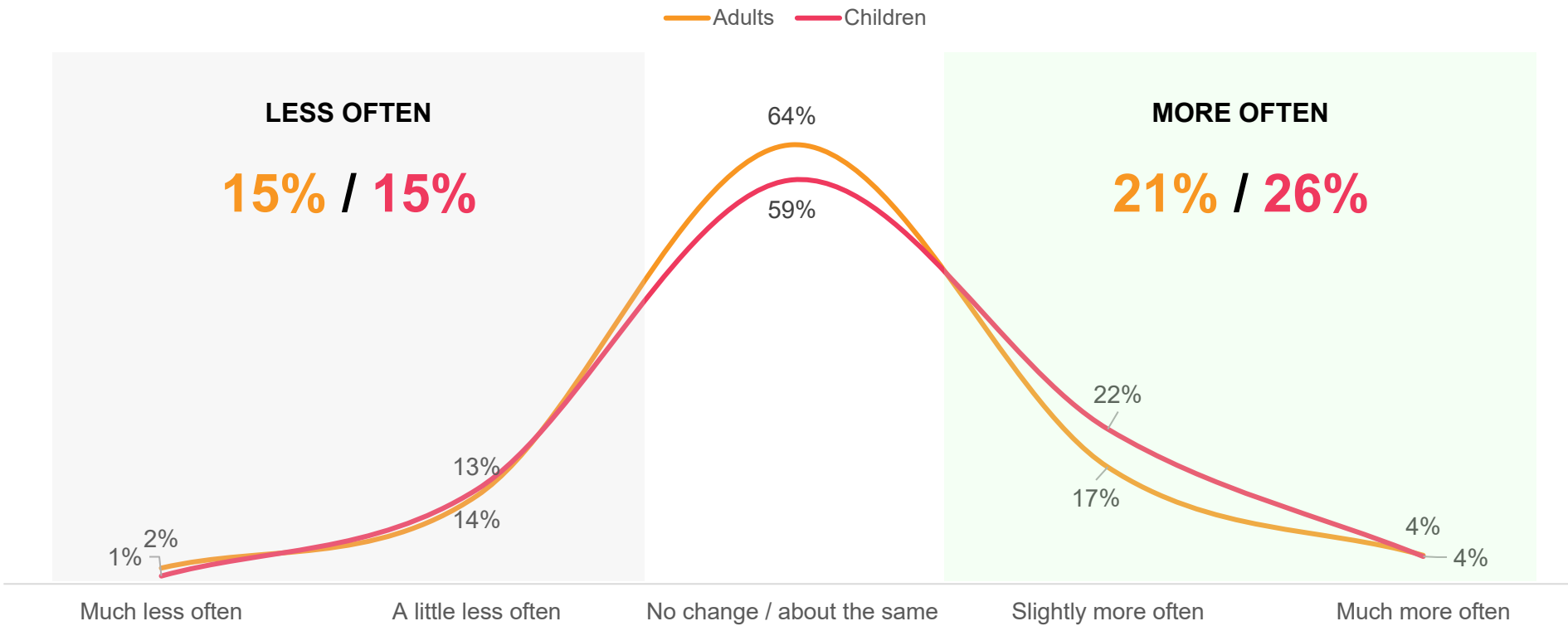
“My kids consume enough vegetables”



# Perceived vegetable consumption is slightly higher than 12 months ago, with most reporting the same and slightly more people claiming higher momentum



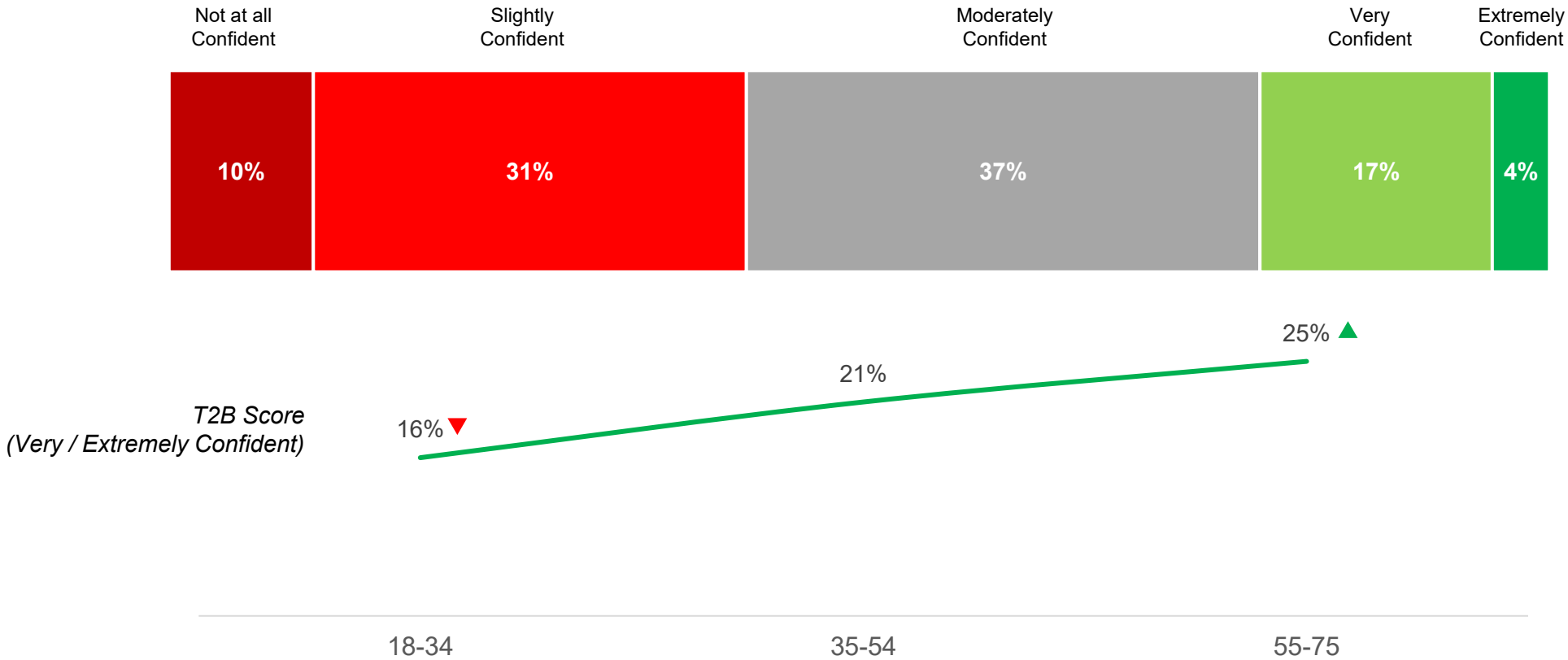
Vegetable Consumption Momentum vs. 12 Months Ago



# Most Australians aren't completely confident in what a serve is; continuing job to educate, especially amongst the younger age group



## Confidence in What a Serve is



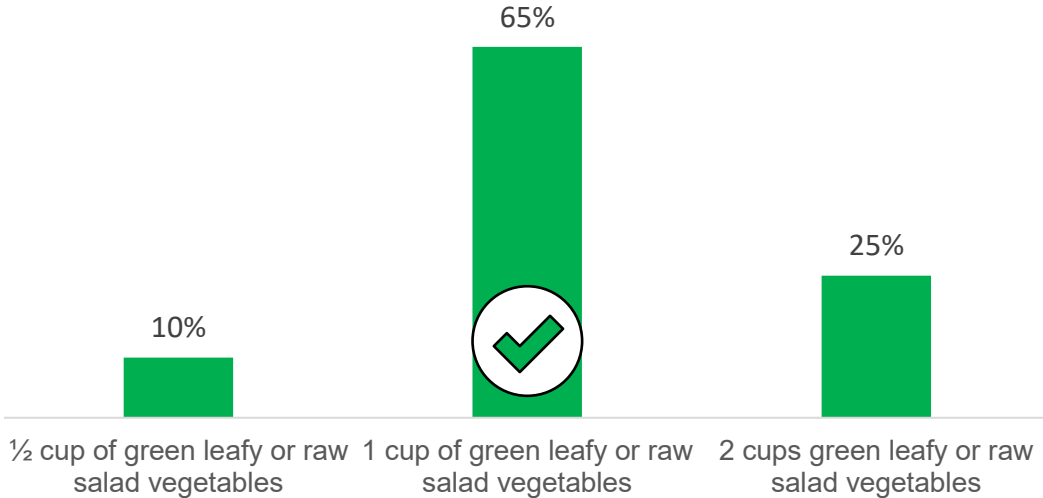
▲ Significantly higher than all other age groups ▼ Significantly lower than all other age groups  
 V3 – How confident are you that you know what counts as one “serve of vegetables”?  
 Base: Total Sample – n=822, 18-34 – n=243, 35-54 – n=298, 55-75 – n=281

# That lack of confidence is justified; Many get the cooked definition wrong (many think it's double what it actually is)

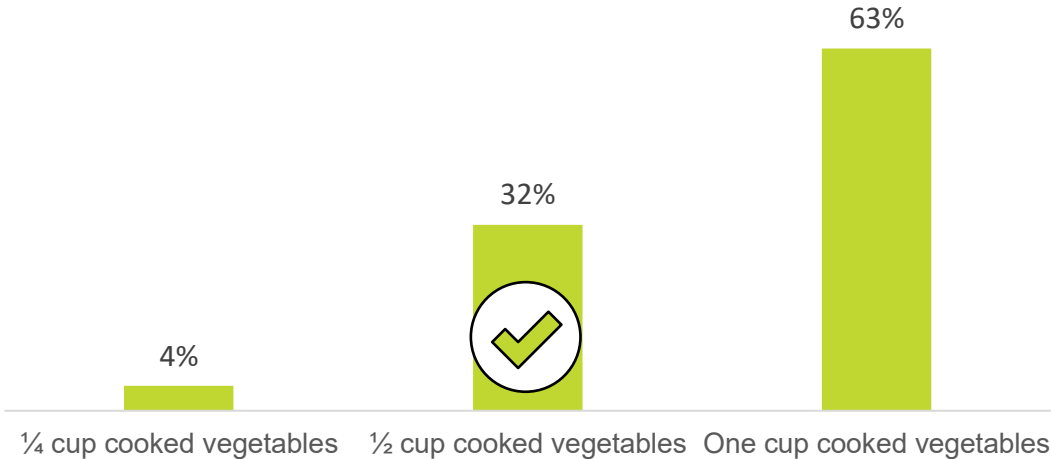



## Perceived Definition of a Serve

### DEFINITION OF A **RAW** SERVE OF VEGETABLES



### DEFINITION OF A **COOKED** SERVE OF VEGETABLES



 Denotes correct definition

▲ Significantly higher than all other age groups ▼ Significantly lower than all other age groups  
V4 - From the list below, please select which options correctly describe one serve of vegetables?  
Base: Those Slightly to Extremely Confident on knowing what a serve of vegetables is - n=736

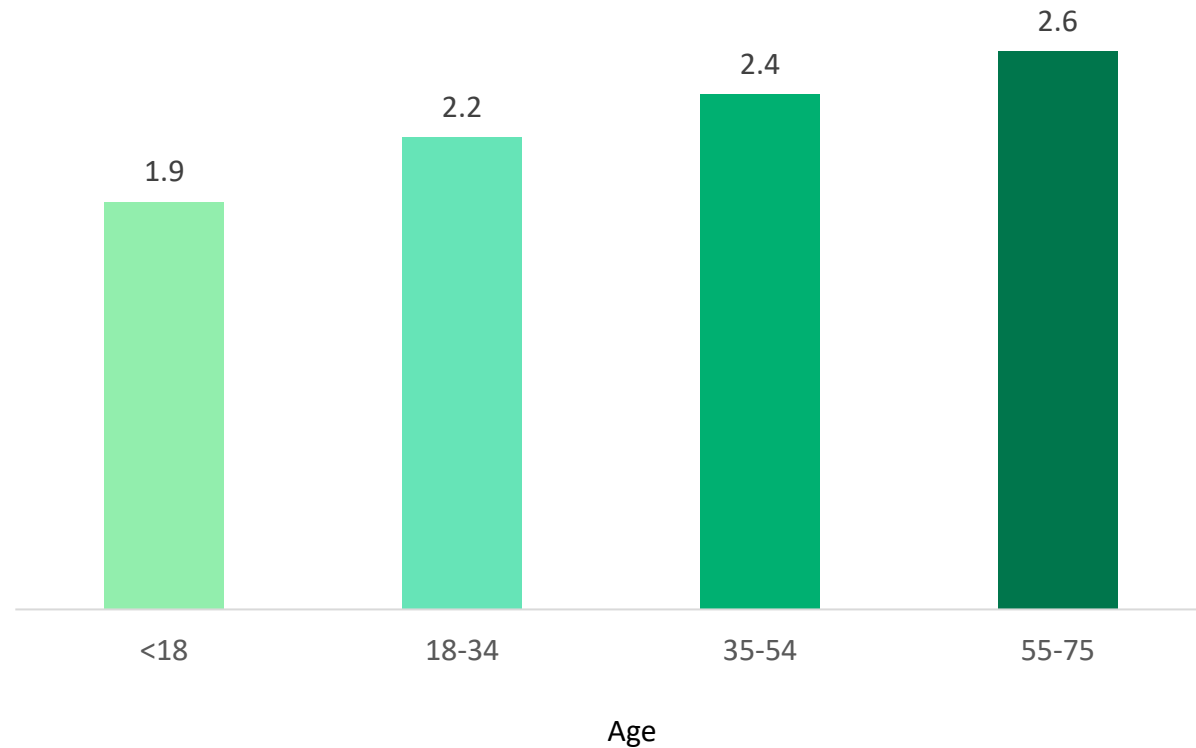
# Based on the correct definition that we provide, Australians are consuming approximately just over 2 serves of vegetables, on average, everyday



Estimated Number of Serves based on Correct Definition

# 2.4

Serves per person per day on average

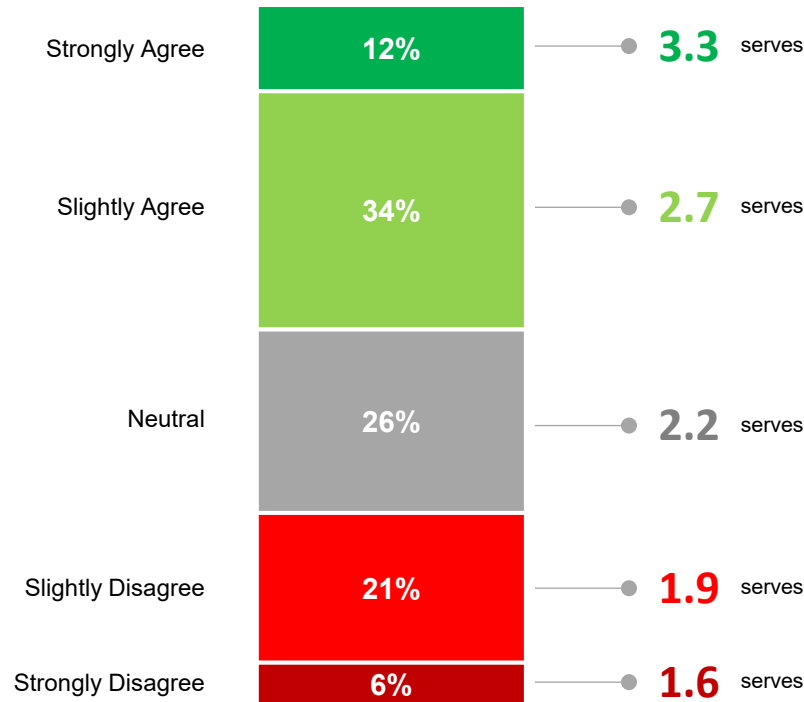


# When you factor in the right definition, even those who feel they are eating enough veg are consuming about 3 serves a day

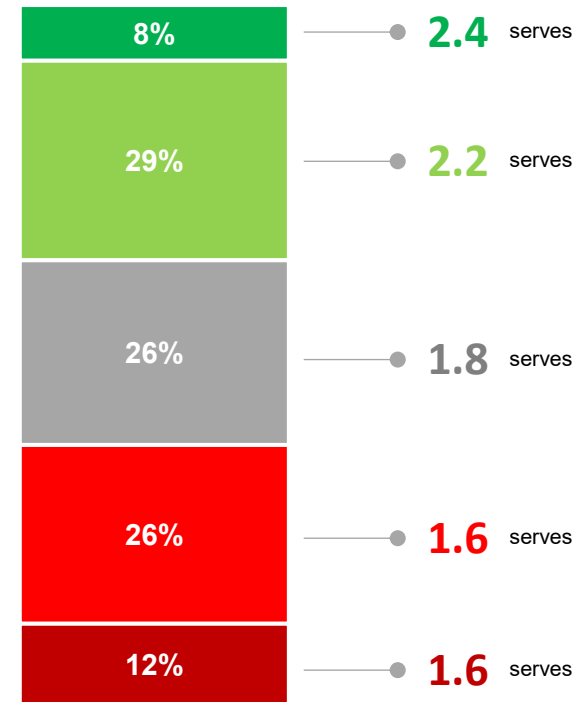


Attitudes to Vegetable Consumption and Estimated # Serves Consumed Per Day (Based on Correct Definition)

## “I consume enough vegetables”



## “My kids consume enough vegetables”



# But there is appetite to consume more

Many Australians recognise the connection between consuming vegetables and good health. There is a desire to eat more but few explicit motivations to do so.

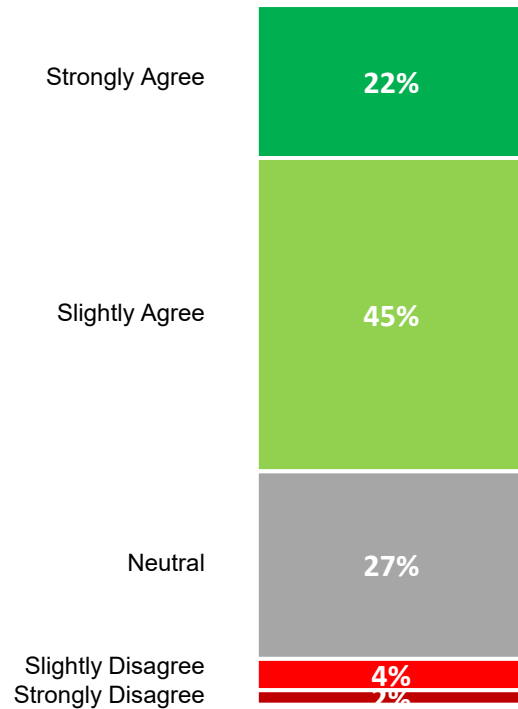


# 2 out of 3 Australians would like to eat more vegetables; they tend to be younger individuals and females



## Attitudes to Vegetable Consumption

“I would like to eat more vegetables”



**67%**

Agree they would like to eat more vegetables



**72%**▲

18-34 year olds



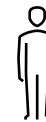
**71%**▲

35-54 year olds



**57%**▼

55-75 year olds



**62%**▼

Males



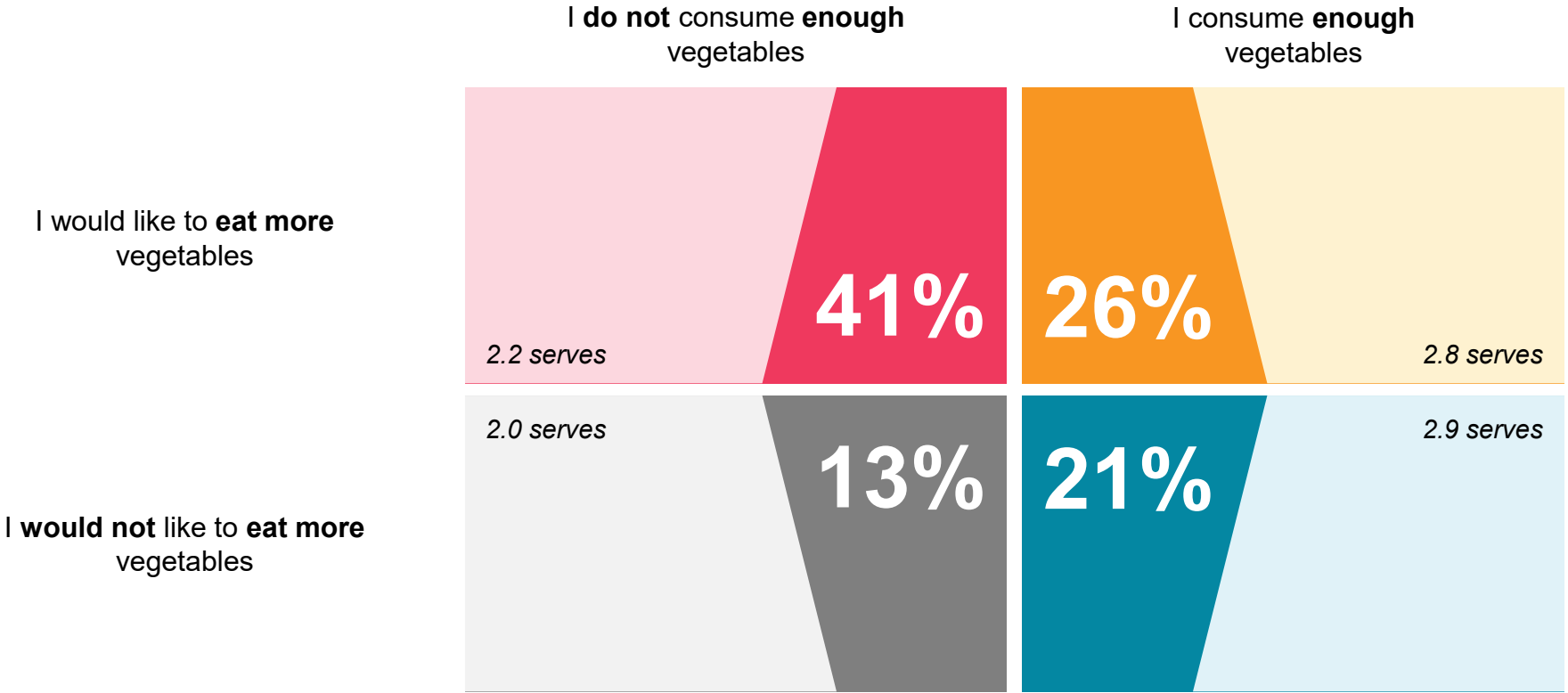
**70%**▲

Females

# Bringing together aspiration of consumption and current perceived need for more vegetables gives us the “Desire Matrix”



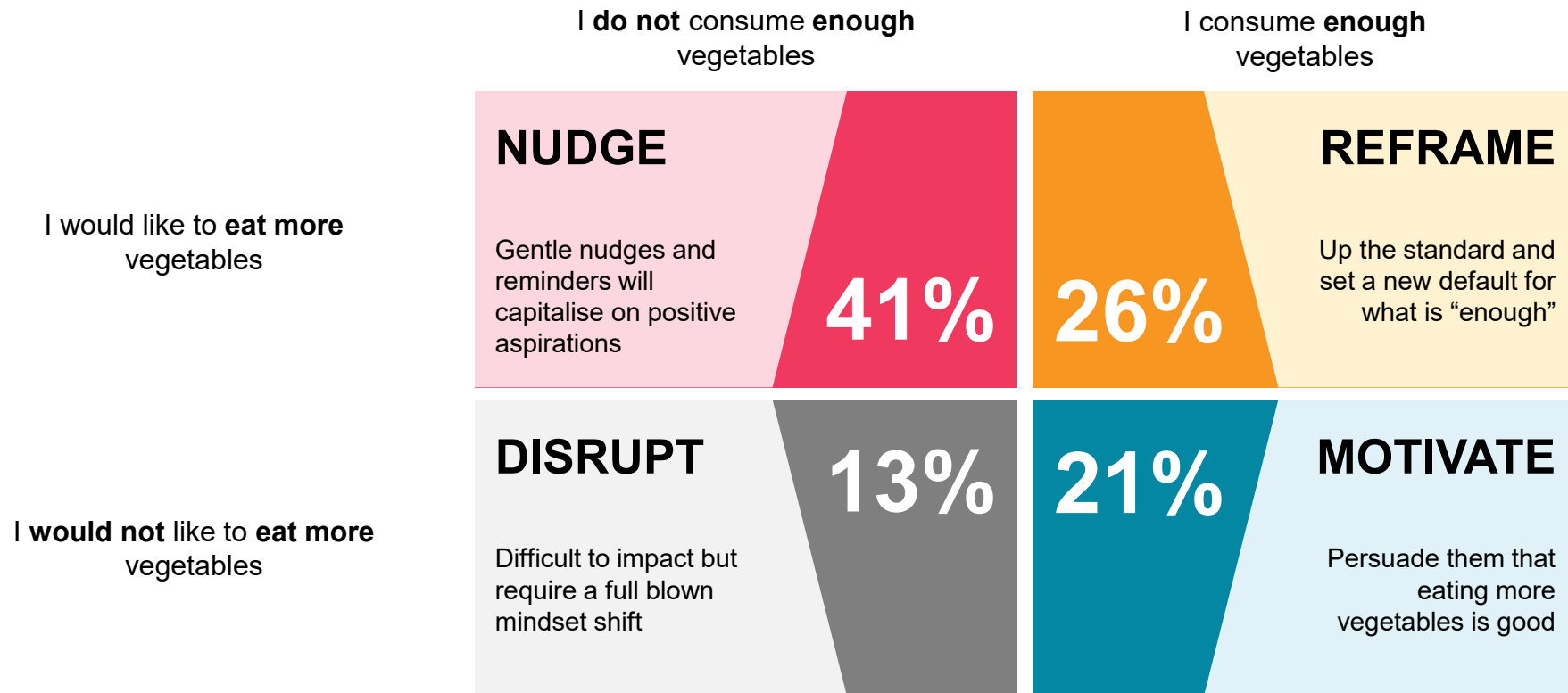
## Desire Matrix



# There are implications for strategy depending on which quadrant you sit in...



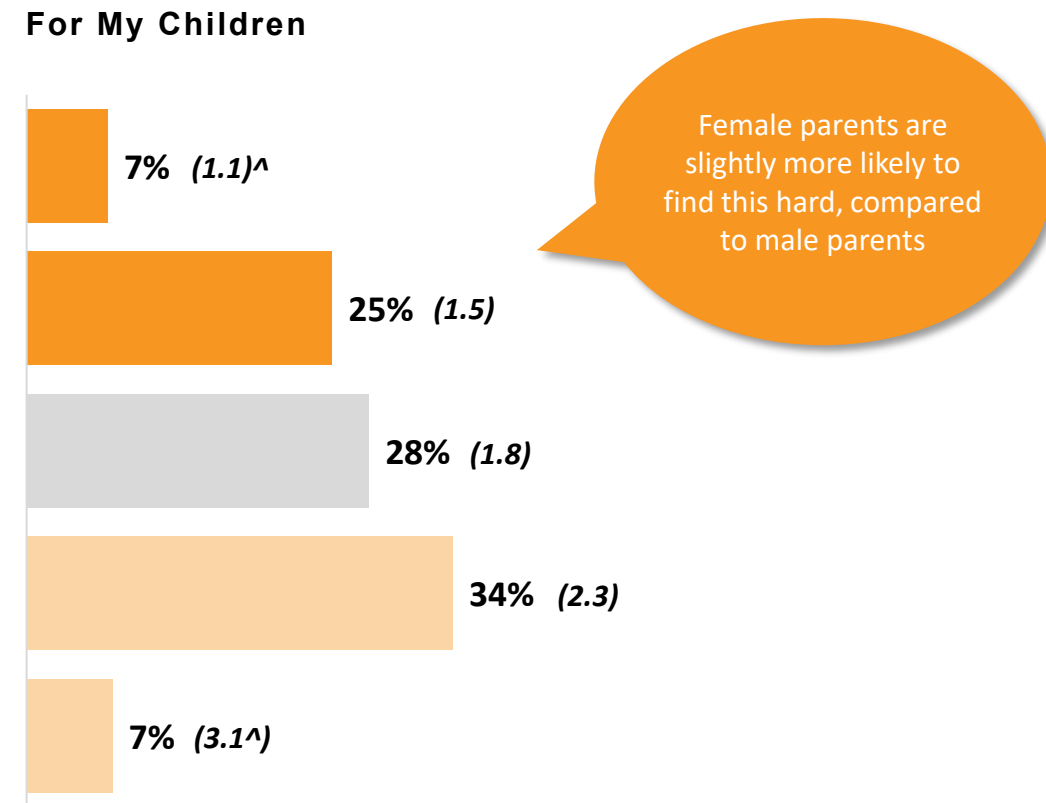
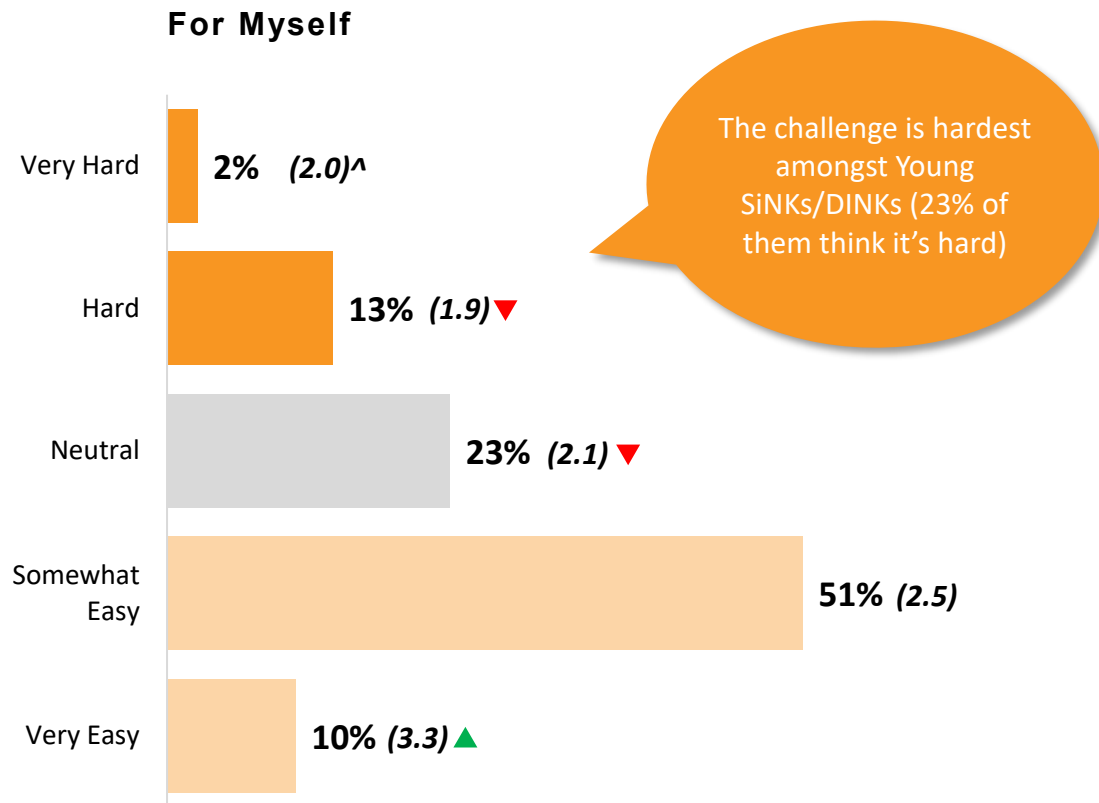
## Desire Matrix



# Most Australians think the objective of eating an extra serve of vegetables is easy, but those people are already eating more than average



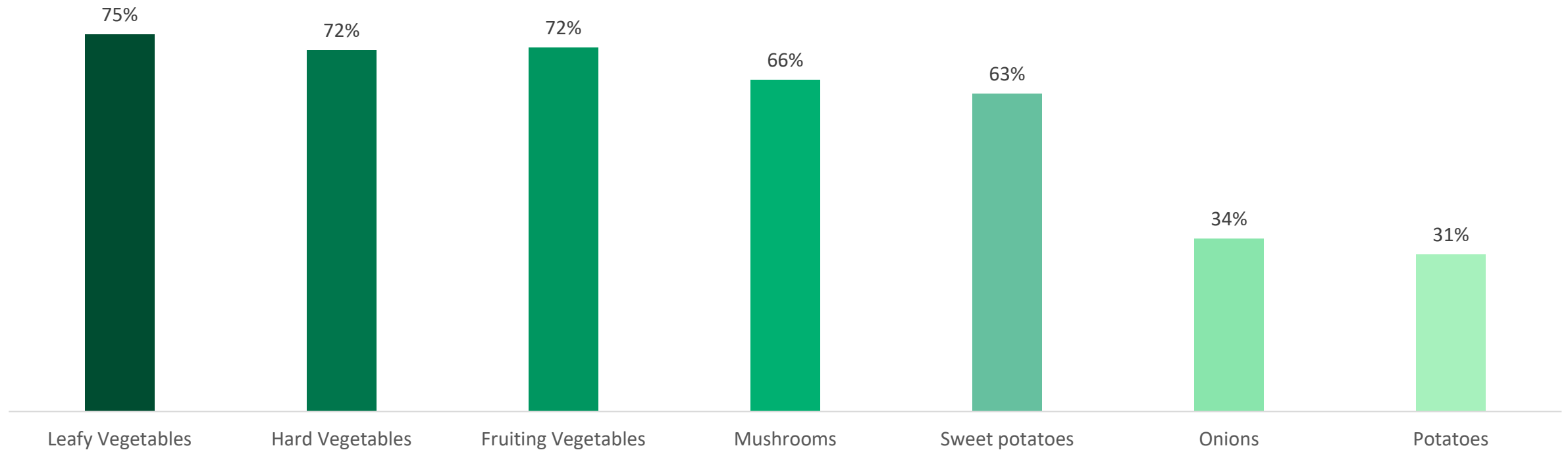
Perceived Difficulty of Increasing Vegetable Consumption by One Serve (Average Serves Consumed per Day)



# A big motivation for this goal is that most vegetables (excluding onions and potatoes) are seen as healthy



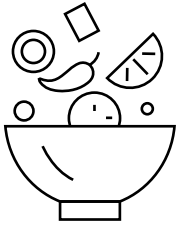
## Perceptions of Vegetables - Healthiness



# There are some clear positive motivations that we can latch on to help drive consumption

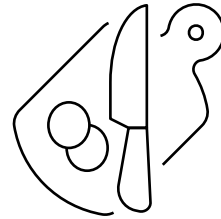


## Attitudes to Vegetable Consumption



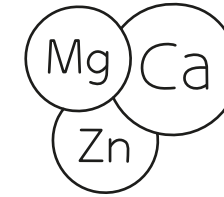
**39%**

Like to try vegetables they haven't eaten before (vs. those 31% who don't)



**41%**

Like preparing vegetables in new ways (vs. 23% that don't like to)



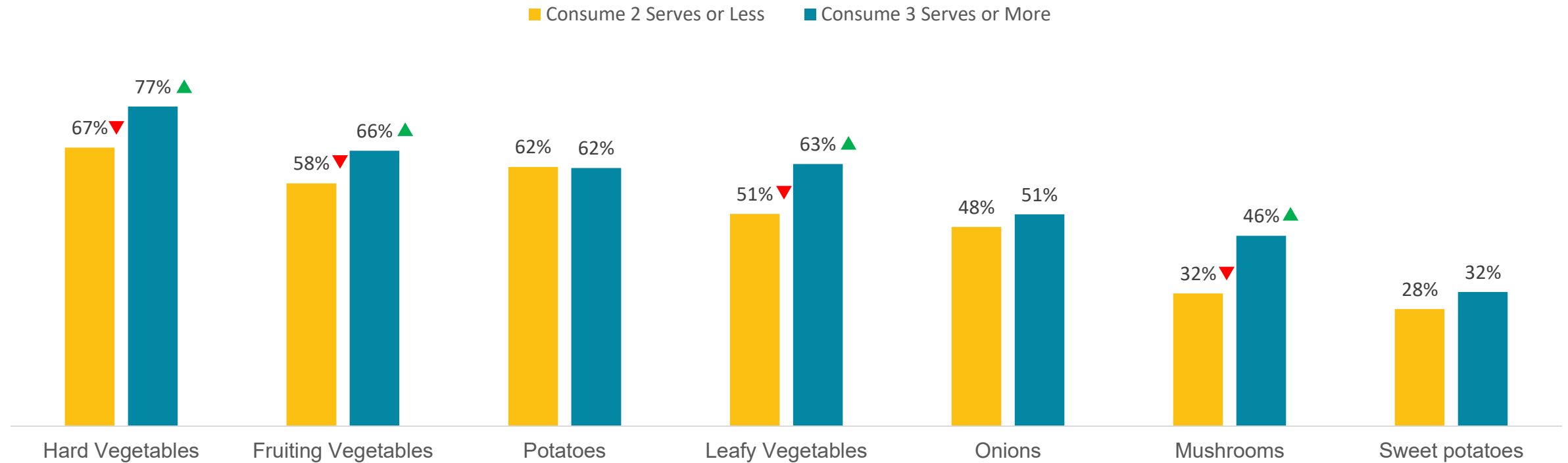
**13%**

Would rather take a supplement than eat vegetables

# A look at people's shopping lists reveals we should focus on hard, fruiting, leafy vegetables, and mushrooms for additional serves



Prompted Vegetable Purchase Intent by Number of Serves Consumed Per Day

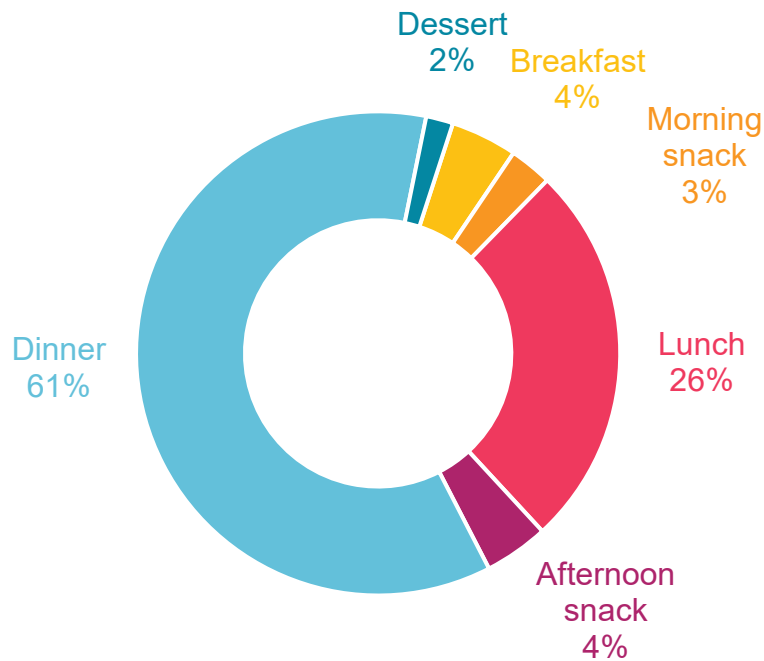


# Most of the vegetables Australians consume are at dinner; there is anticipation that incremental serves will also mostly be at dinner

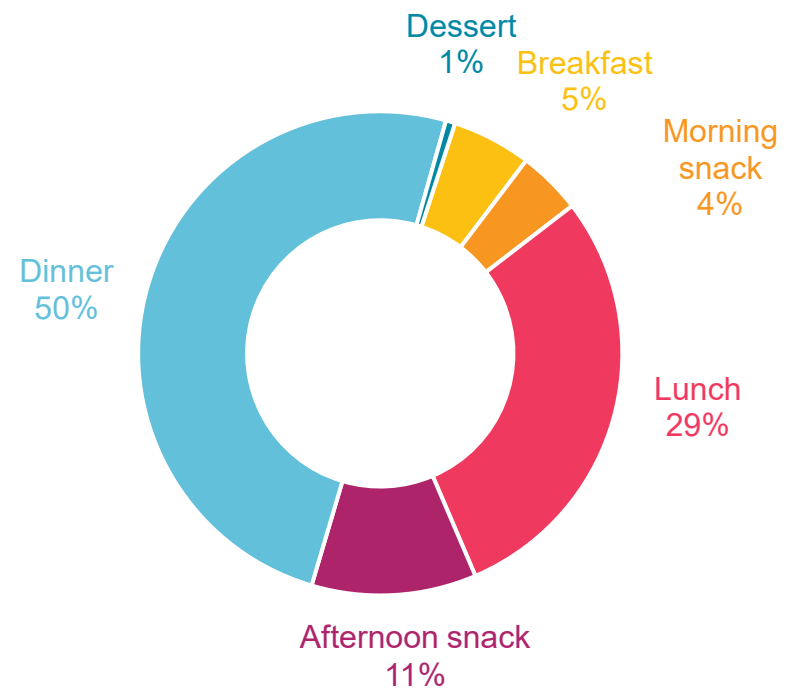


Vegetable Consumption by Occasion vs. Incremental Growth Opportunity

Breakdown of Vegetable Consumption by Occasion



Occasion Most Likely to Consume an Extra Serve of Vegetables



# Some key barriers need to be overcome

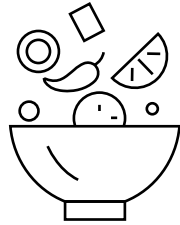
While there is interest in consuming more, there's significant concern on how Australians can incorporate additional serves into their budgets and their cooking plans



# Guilt is a powerful motivator but it's a negative one, and there appears a need to frame vegetables more positively

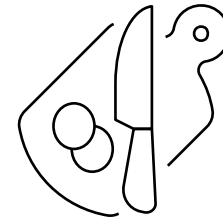


## Attitudes to Vegetable Consumption



**53%**

Feel guilty that they don't eat enough vegetables



**45%**

Would rather eat fruits than vegetables (vs. 18% would rather eat vegetables)

# But the biggest barrier is a lack of time and energy to add an additional serve into the meal repertoire



The number one biggest barrier to increased vegetable consumption...

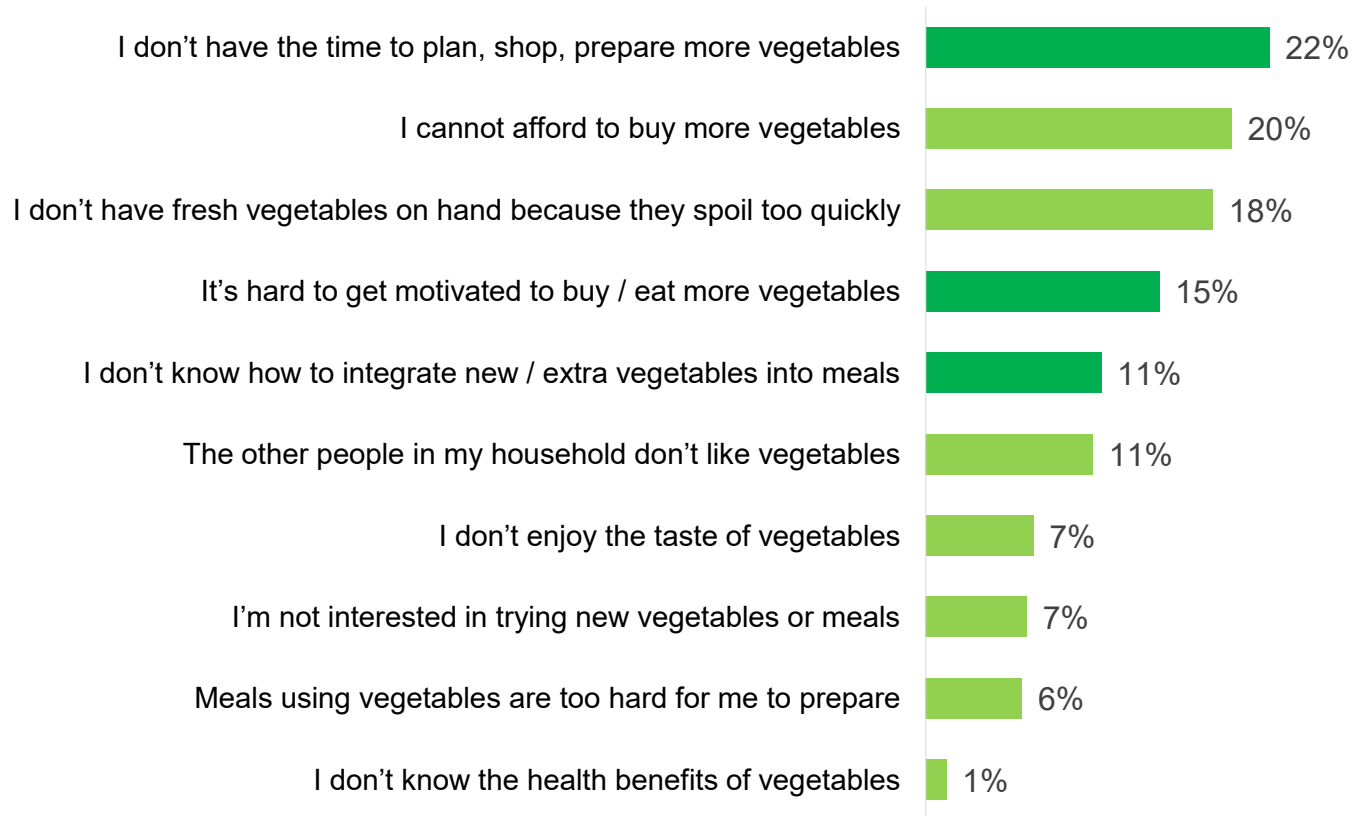
*I don't have time to plan, shop, and prepare more vegetables!*



# Looking at all the barriers, the theme of effort and skills emerges as a key problem to solve; awareness of health benefits is not an issue



## Barriers to Increased Vegetable Consumption (for myself)



# Building confidence and love are two key ways to unlock additional consumption growth...

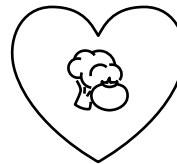


## Attitudes to Vegetable Consumption



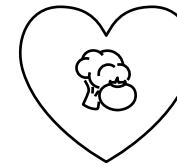
**+0.5**

Those who have confidence in preparing fresh vegetables consume half a serve of vegetables more on average per day



**+0.9**

Those who love to eat fresh vegetables eat almost one extra serve per day



**+0.5**

Children of those who love to eat fresh vegetables eat half an extra serve per day

# For children there is a considerable risk at introducing new vegetables into meals



The number one biggest barrier to increased vegetable consumption for children...

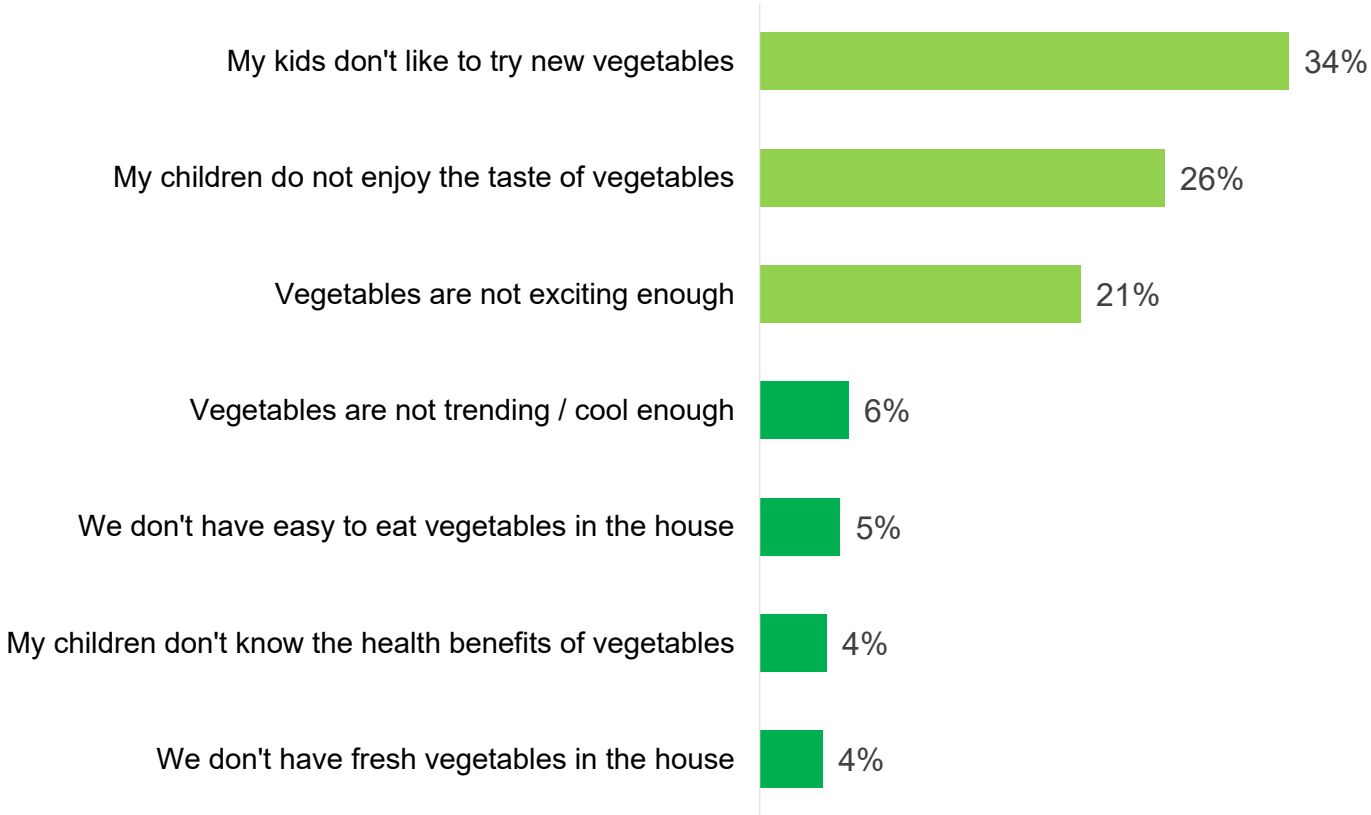
*My kids don't like to try new vegetables*



# Looking at all the barriers, the theme of effort and skills emerges as a key problem to solve; awareness of health benefits is not an issue



## Barriers to Increased Vegetable Consumption (for my children)



**Voice of the  
People**

**Watch the webinar to see what real consumers said.  
Here are some key points from their videos:**

*Q: If you were to increase your veg consumption by one more serving, what vegetable would you choose to eat more of and how would you incorporate it into your day?*

We found consumers' chosen vegetable needed to be versatile and easily incorporated into current habits.

*Q: What is the biggest barrier to eating one more vegetable serving every day?*

Often preparation time, planning ahead and taste were identified as the biggest barriers

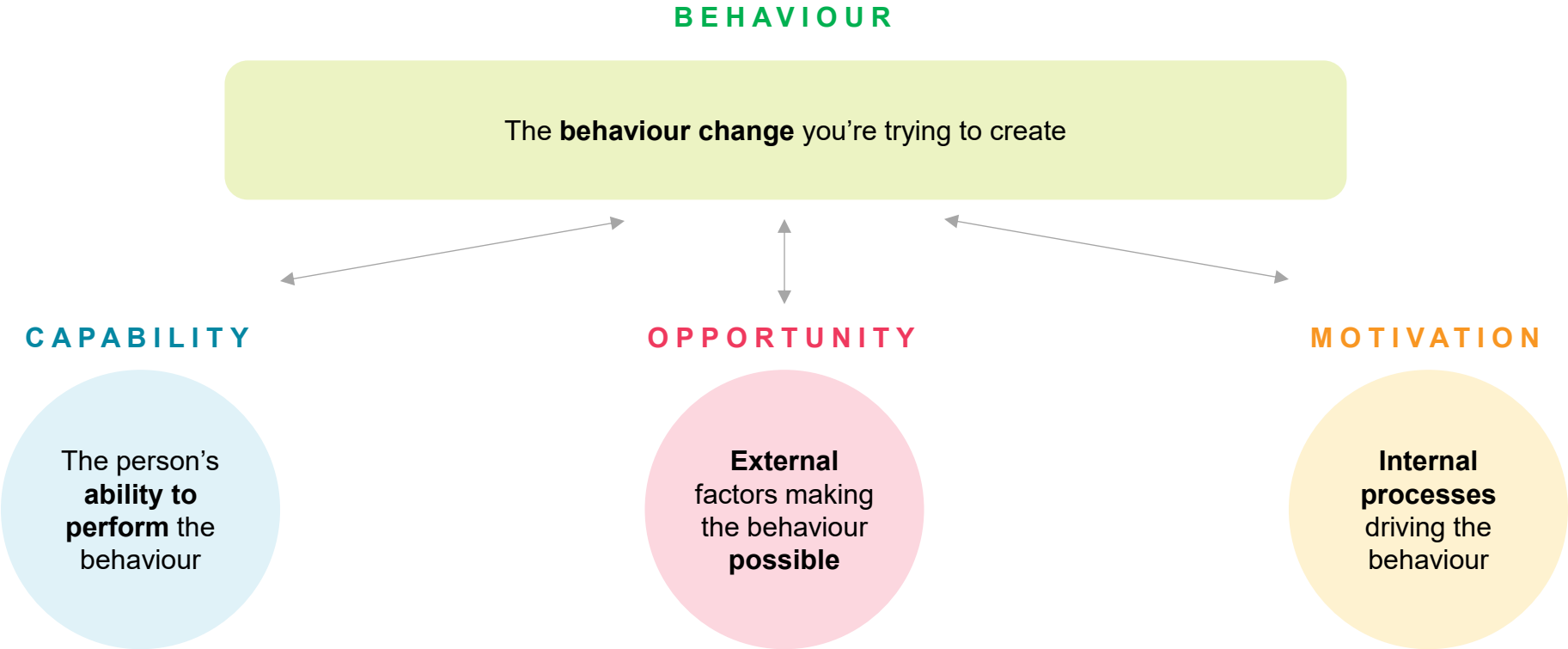


**The Last 5  
Minutes**

# Considering the COM-B model of behaviour change, the challenge of increasing vegetable consumption is clear



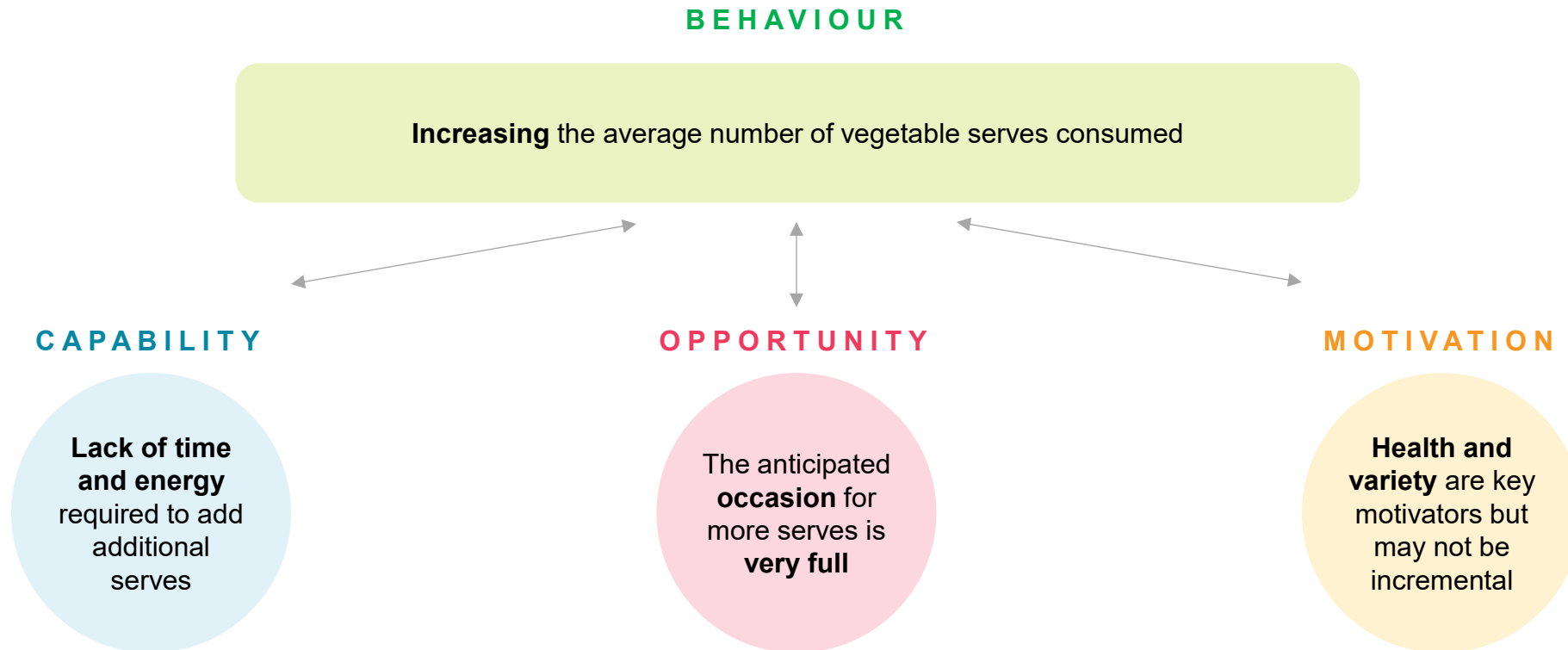
Applying the COM-B Behaviour Change Framework



# Considering the COM-B model of behaviour change, the challenge of increasing vegetable consumption is clear



Applying the COM-B Behaviour Change Framework



# The Last 5 Minutes – Other Key Learnings and Implications

## LEARNING

01

There is **confusion** around what a serve is, particularly when it comes to **cooked vegetables**

## IMPLICATION

Many don't think too much about the quantity they're eating and feeling just having some is probably ok. We **need to set the standard** so consumers have a clear view on how much a healthy amount is

02

2 out of 3 **Australians want to eat more vegetables** but this is often driven by **negative emotions** (feelings of guilt) and legacy attributes (healthiness)

We don't have to work too hard to drive motivation; but we **need to positively frame this motivation** instead of building off heavily embedded drivers (e.g. healthiness)

03

Most of us think **the challenge** of increasing vegetable consumption by one serve **is easy** but important to remember the biggest barrier is a lack of time and effort

There is clear evidence of the **Planning Fallacy**; where people **misjudge effort or time** required to achieve a goal. Programs that **change the narrative** to more serves being a default, rather than aspiration may help

04

Increasing vegetable consumption amongst **children** is a different challenge; there is **reluctance amongst trial** for fear of rejection so **vegetables that are versatile** have high equity

Adding new vegetables for children is important but difficult. The path of least resistance may be **introducing popular & versatile vegetables into new occasions**. Snacking formats are critical, but innovation should continue to pursue them further

# Driving Australians' Vegetable Consumption

LEARNINGS FROM THE HORT IQ USAGE AND  
PERCEPTIONS PROGRAM

Hort Innovation Thought Leadership Series

February 2026

