

final report

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Scoping Opportunities for Australian Red Meat Industry in the Emerging Digital Technology Space

Final Report

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Executive summary

The overall aim of this project entitled *Scoping Opportunities for Australian Red Meat Industry in the Emerging Digital Technology Space* was the development of a series of Desirable, Feasible and Viable innovation platforms/opportunity spaces for Australian red meat in the burgeoning area of Digital/Connected Food. This research project is part of a broad suite of initiatives by MLA to equip the wider Australian red meat industry with new opportunities to increase value-addition to the red meat industry.

This research was undertaken by Ipsos Australia and incorporated three phases:

Phase 1: Discover Possibilities: Connected Food Trend Scan and Key Opinion Leader Interviews

Ipsos conducted a series of 4 one hour interviews with key opinion leaders in the innovation, food, home and kitchen appliance spaces to gain insight and feedback on the current and future Connected Food landscape. The key themes and insights from these interviews helped us shape the Phase 2 consumer conversations, ensuring that we took a wide focus of understanding the entire consumer journey. A key insight from the KOIs was that the opportunity for MLA is in fully “joined up” propositions that solve needs across the total consumer food journey.

In Phase 1 Ipsos also combined Ipsos SMX Social Listening and traditional Desk Research which unearthed a number of consumer tensions, particularly the confusion around healthy food choices with constantly shifting “food truths” causing tensions in consumer food choices, shopping and preparation. Unpacking the deeper need and a more detailed understanding of these tensions was built in as an objective of Phase 2.

Phase 2: Identify Consumer Needs: What is the Customer Journey of Red Meat Meals and what are their ‘Jobs to be Done’?

In Phase 2 we undertook 12 x 2.5 hour in-home meal time observations and interviews, each of which were preceded by a self-ethnography diary task. The objective for this phase was to identify exactly what the problems or the ‘jobs to be done’ that potential Digital Food propositions could address. The research approach was a mixture of observational research and moderator directed discussions conducted in respondent’s home during dinner time. Respondents shared with Ipsos the preparation and cooking of that night’s red meat meal.

An extensive list of consumer tensions and workarounds and also moments of consumer delight were identified through each stage of the red meat meal journey, from moment of meal inspiration through planning, shopping, preparation, cooking, serving, tidying and finally management of leftovers. Based on these insights and broader ones regarding the changing role of the main meal, the role that red meat plays and variations in needs due to family dynamics, Ipsos developed five draft Digital Food platforms which were used as reference in the Ideation Workshop component of Phase 3.

Phase 3: Define Opportunities for Red Meat in a Connected Food Future

Phase 3 took the form of an Ideation Workshop facilitated by Ipsos and held with the MLA innovation team and a number of MLA partner organisations and advisers. The aim of the one day workshop was to bring together the insights from the consumer research, the learnings from global trends and key opinion leaders and the expertise of the room to develop a number of Digital Food concepts. Following the workshop these concepts were developed further by Ipsos to ensure they were suitable for consumer testing. These concepts were subsequently tested quantitatively amongst a sample of n=450 Australian consumers.

Key Insights

1. Digital Food solutions will need to incorporate some or all of the following:
 - a. New User Interfaces such as voice (Alexa, Google Home) as these will disrupt consumer food and meal journeys significantly
 - b. Consumers are looking to integrate Food with Health in a Connected Health and Food paradigm
 - c. Aid delivery of 'cooking /meal success' as consumers are driven increasingly by meal 'perfection'
 - d. Personalised nutrition and needs varying at an individual level, and often by meal occasion
 - e. Create solutions for the growing need for changing family/household demand for 'customisable meals'
 - f. Aid with food waste and sustainability, with consumers more focused, knowledgeable and concerned about food production, distribution and wastage
 - g. Consumers are interested in alternative protein sources and while red meat is still enjoyed, red meat will need to play a role in this shift
2. The meal and the protein source are the 'kick-start' for the meal choice, but consumers are looking to be inspired to stretch the meal repertoires. Digital is the ideal mechanism for inspiration, building upon what consumers are already doing (common usage of YouTube, Tasty, Instagram etc as leisure/relaxation and more directed inspirational sources)
3. Meal planning does not work too far ahead. Consumers want the flexibility to change their plans through the week
4. The concept of "*dinner time*" has changed – 4pm when the kids get home, 'whenever' dinner (each family member eating when fits their individual schedule), the 'whatever' dinner (whatever can be found in the fridge!)
5. Cultural origin provides a guide for the role of dinner and attitudes and behaviours towards red meat (means of staying connected to roots, concepts of an "Australian" meal, handling of meat – washing, wringing the blood out etc, different shopping behaviours, experimenting outside of what you grew up with)
6. Confusion over 'food truths' means consumers are looking for simple methods to keep nutrition in check such as "*eating to the rainbow*" restriction, swap outs and self-imposed meat rationing (portion size and semi-regular meat-free meals).
7. Recipes are for inspiration and less so for being used as the guide for cooking a meal. Extensive digital sharing of recipes and food inspiration through YouTube, Instagram, Facebook, blogs, favourite digital sources such as Tasty.
8. Red meat fails are a major pain point, with red meat seen to be more prone to fails than other meats. Butcher provides more assurance of meat quality. Supermarket is a source of inspiration but also confusion and concern regarding quality
9. Fresh meat is always best but frozen is acceptable. Freezing and de-frosting meat is a tension point from both a food health and food quality perspective

10. Younger consumers are missing an understanding of the cooking basics, wanting to be empowered with knowledge but it needs to be effortless

Digital Food Opportunities Quantitatively Tested

It is challenging to quantitatively test “*next horizon*” innovations with consumers, as it is difficult for consumers to be able to evaluate whether they would be likely to use a digital solution when they cannot see first-hand how it would work. With this challenge in mind, the quantitative stage of this research was primarily included to determine the most appealing direction in which MLA and its partner organisations should go when exploring opportunities in the demand-side of consumer food quite broadly and, secondly, what type of features would be of most appeal. What was very clear from this stage of the research was that some of the key insights identified in Phase 1 and 2 are more relevant across a broader spectrum of people and are pertinent to needs right now. The insights that should be of central focus for the industry can be summarised as:

1. The omnipresence of personalised nutrition and needs. Solutions that aid consumers to keep track of their own specific nutritional goals and easy solutions to help master the cooking of nutritional meals is highly desirable
2. Seamless integration and building of knowledge, ideas and guidance from *at the shelf* through to *at the stove* is what consumers want and expect to be delivered digitally
3. The need to customise family meals to suit the demands of individual family members is very real and present. Food swap ideas delivered digitally and based on learnt knowledge of your individual family, is a solution to the challenge for the cook of trying to cater to all. The concept of one set meal for everyone in the family is less relevant today with all people, particularly the young (teens/young adults) very focused on their individual dietary goals and likes/dislikes.
4. Relevant individualised content served directly anywhere, as needed. Content ideally through video form. Built in intuition to decide what you need when you need it (e.g. what is on sale today as you enter the meat section of the supermarket)

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1 Background

There is growing evidence that digital technology is set to fundamentally revolutionise the production, distribution, preparation and consumption of all food including red meat.

“Connected Food” or “Digital Food” is about to reach a key inflection point, akin to the momentum we are seeing within Connected Health, Fintech, Insurtech – i.e. the revolutionising of current business models and value chains to reorient to both shifting technological possibilities (supply side drivers including AI, AR, IoT, Big data, Zero interface, Genomics and Materials) and the needs of the empowered and connected and consumer of today (demand side drivers).

Market leaders in the home and kitchen appliance manufacturing sectors, the agriculture and food industry, as well as a plethora of start-ups are ensuing that food production and consumer food choices, preparation and consumption behaviours are set to rapidly shift with a 3-5-year horizon.

Many large players are active in bringing to life an imminent *Connected Food* future including tech platform provider such as ATT, appliance manufacturers such as Westinghouse, LG, Sunbeam, and Vitamix; grocery and food retailers including Amazon and Woolworths, as well as CPG food giants including Nestle and Mars.

Against this backdrop this research project was designed to inform a broader suite of initiatives aimed at understanding the opportunities that exist in the exploding area of “Digital or “Connected” Food innovation – which encompasses everything from supply chain digitisation, through to new forms of direct to consumer retailing as well as food preparation and smart kitchen innovation.

This initiation undertaken by MLA represents a key opportunity to fulfil MLAs broader Digital Value Chain Strategy and expand innovation from farm gate to plate – in a vision to develop a full end to end digital value creation and value chain integration that mirrors and fulfils customer needs all along the customer journey.

2 Project objectives

The aim of this particular project was the development of innovation platforms/opportunity spaces in the broad area of Digital/Connected Food. These platforms need to identify:

- Which customer needs would be addressed by a digital food solution built around red meat
- What problems/tensions are being solved
- What are the key features within a digital product/service/platform that match target customers' problems/needs
- Possible target markets for these opportunity spaces
- Digital Connected Food Platform suitability/opportunity for Australian red meat (i.e. ability for Australian red meat to capture as opposed to other countries or other protein sources)

3 Methodology

The research methodology employed included a mix of;

- Big data social listening (Phase 1)
- Desk research (Phase 1)
- Key Opinion Leader interviews (Phase 1)
- Qualitative in-home observations and interviews (Phase 2)
- Internal ideation workshopping, facilitated by Ipsos (Phase 3)
- Quantitative concept testing (Phase 3) utilising Ipsos' Vantis methodology

4 Results

The key findings and insights from Phase 1 and Phase 2 were shared through the Milestone reports and PowerPoint reports (see Appendix). A summary of these were presented and discussed at the Ideation Workshop and used as stimulus material. This material was used as the springboard for the workshop team to identify a number of tensions related to consumer needs where there was an identified role for a digital solution to help resolve relevant consumer needs. The team identified tensions in relation to personas (life stage segments) that were identified in the consumer research (Phase 2). The personas the workshop team ideated for are as follows:

Fig.1

Persona 1: SINKS/DINKS

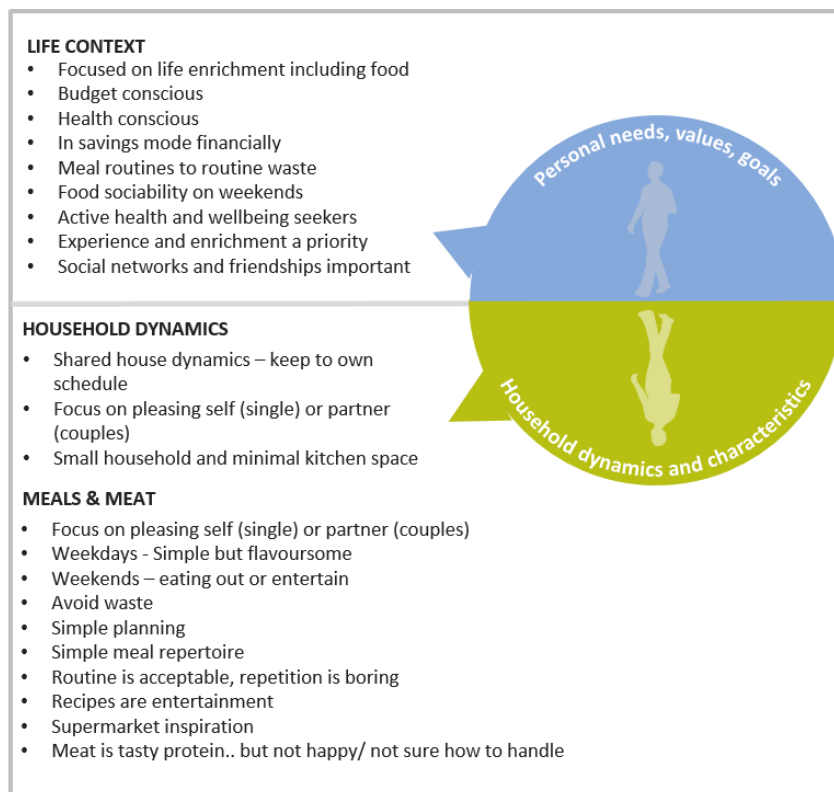


Fig.2

Persona 2: Young Families

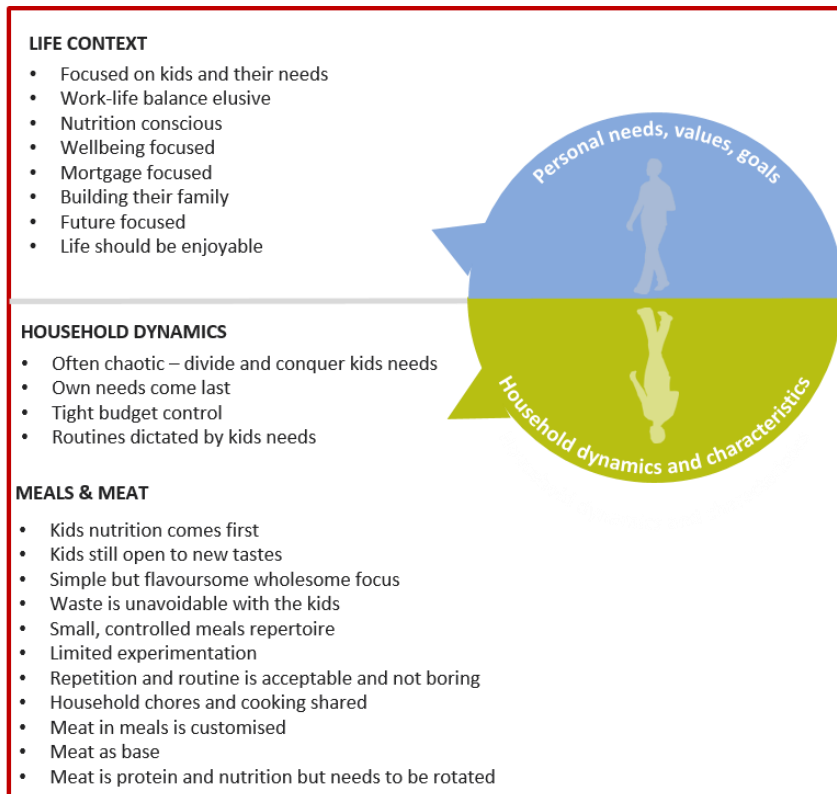


Fig.3

Persona 3: Older Families

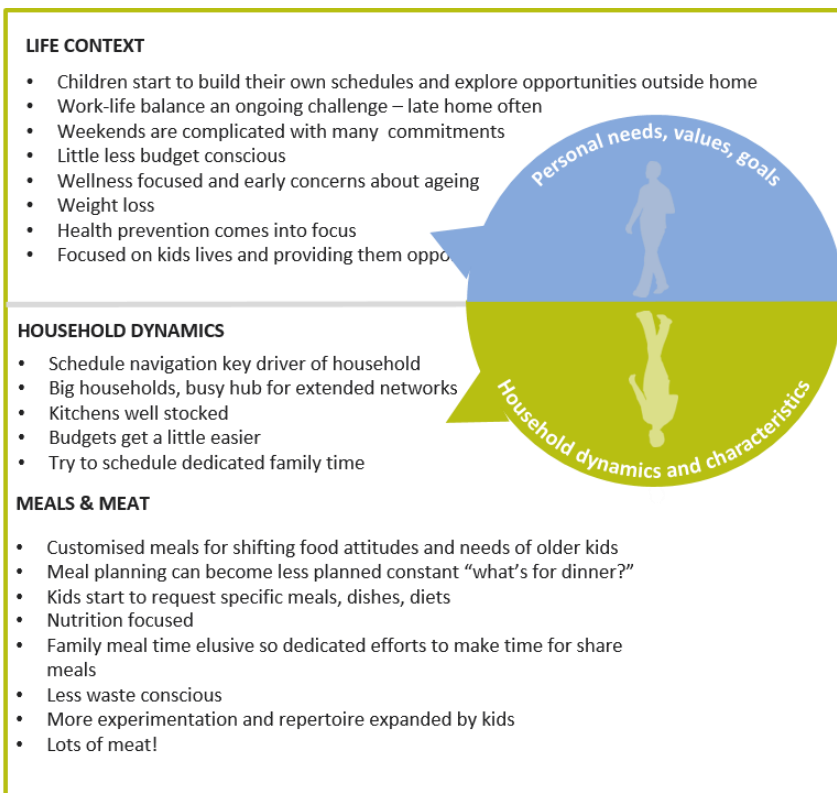
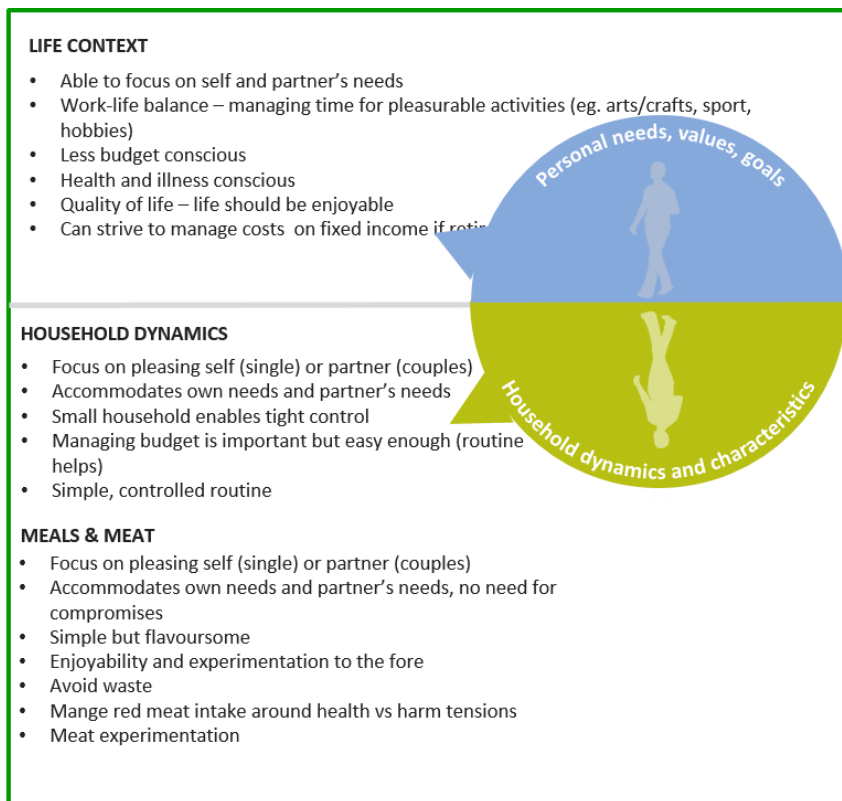


Fig.4**Persona 4: Empty Nesters**

4.1 Consumer Red Meat/Meal Tensions Used as a Base for Concept Development

As an output result of the workshop, Ipsos formulated a list of the key tensions and how they related to an insight, which were then used as the starting point for concept development. These were as follows:

- Hectic family lives mean less shared dinners. The *meal planning task* has consequently become more challenging and problematic as cooks need solutions for modular meals
- *How do I cook beef right?* What is the right cut? How long do I cook it for? What cooking method? This creates anxiety as meat fails are costly
- Family tension of “what should we have for dinner?” I need *more inspiration!*
- *Red meat health myths versus reality.* Does red meat give you cancer? Should I be limiting my red meat consumption? What is the real relationship between saturated fats & heart disease? What are the REAL food truths?
- I don't have the *time or inclination to hone my cooking skills* but I want BIG FLAVOUR and the RIGHT texture, every time.
- I want to eat healthily but I am worried about the food wastage that arises from buying fresh foods
- The tension between *enjoyment, health/nutrition & personal wellbeing*
- How do I achieve the optimal balance on the plate? What is the right amount of protein? What is the right amount of veg?

- Red meat is a costly delivery vehicle for flavour
- I'm confused about the safe handling, prep & defrosting involved with meat
- I want cooking guidance, not recipes to follow
- The challenge of navigating the needs of every member of the family is becoming increasingly challenging – no gluten, low carb, low fat, vegan etc.

Based on the above, the below 6 concepts were tested quantitatively.

Fig.5

CONCEPT 1

Spotify for dinner - what should we have for dinner tonight?

Meal planning and inspiration App

Why: When it comes to weekday meals, my family definitely know what foods they will and won't eat, but the same repertoire of meals can get pretty boring. If only I could outsource the daily question of "what should we have for dinner tonight?"

What: 'Spotify for Dinner' uses new state of the art smart AI technology to serve users with interesting new meal inspirations. It is an App that learns your family's food preferences via your existing meal repertoire and any images you post to the platform. The AI technology will send you similar recipes along with reviews, videos and a grocery list to make shopping easier.

How: Key features include:

- Huge recipe database searchable on food preferences
- Sends you daily/weekly recommendations and recipes based on your meal preferences and what "others like you" search and make
- What's on sale/ fresh /seasonal notifications in grocery/deli/markets near you
- Can scan your cupboards to develop shopping list
- Create shopping lists to coordinate family suggestions
- 12 hour ingredient delivery available
- Save your favourite recipes, and filter your search results by diet, cooking time, and foods you don't like
- Integrated Voice (in the kitchen) and App (on the go) platform
- YouTube style "how to" videos

Fig.6

CONCEPT 2

In store Protein Pal - Red meat/Protein health and nutrition guidance App

Why: I know that including protein in my diet is important, and red meat is important for my health but there is so much confusion about how much I should be eating and what are the healthy ways to cook red meat. It is frustrating standing in front of the red meat section in the supermarket and deliberating on the healthy cuts and how they should be cooked.

What: New 'near field' technology directed straight to your smartphone gives you the health and cooking guidance to optimise your protein balance in your diet – when you need it, right where you need it – at the shelf!

How: Key features include:

- Swipe shelf and see protein information (red meat, meat alternatives) regarding source of origin, welfare, type/cuts, nutrient and calorie breakdown
- Customisable to your weekly and daily personal health, nutrition and activity goals
- The ideal serving size for you
- Add your own recipe to see your meal's full nutrition data
- Discover if you're hitting your daily recommended amount of vitamins and minerals with the app's daily food journal
- Personalized recipe and cooking recommendations
- Integrated Voice (in the kitchen) and App (on the go) platform

Fig.7

CONCEPT 3

Red meat success every time – Perfect red meat cooking App

Why: There is nothing like the sense of satisfaction and enjoyment of cooking a piece of beef or lamb perfectly – great flavour, great texture – true success. But cooking red meat can be a bit of a gamble. I don't need to be an expert, but I just need better knowledge about what cut to buy, for what dish and how best to cook it. I want the information where and when I need it; at the supermarket shelf AND in my kitchen when I am prepping and cooking.

What: New 'near field' technology linking your device and your appliances gives you the meat cooking guidance you need right where you need it – at the shelf, or in the kitchen, activated by voice or touch as and when needed.

How: Key features include:

- Cooking suggestions to your phone swiped from produce at shelf
- Cooking tips & tricks from the experts
- What meat is on sale/ fresh/seasonal notifications in grocery/deli/markets near you
- Save your favourite recipes, and filter your search results by diet, cooking time, and foods you don't like
- Integrated cooking solutions include smart oven, slow cooker and pressure cooker for perfect healthy red meat dishes your family will enjoy every time
- Integrated Voice (in the kitchen) and App (on the go) platform
- Step by step YouTube style smart "how to cook" videos

Fig. 8

CONCEPT 4

Customised family meals – Managing family meal preferences App

Why: As my children have grown up, their nutrition and dietary needs and wants keep changing, it is sometimes hard to keep up! How can I manage to meet all my family's changing food preferences and nutritional needs as they grow from babies to teenagers to young adults? Dinner can be a real challenge to meet all these needs at once.

What: A family food App that allows to you to seamlessly plan, shop and cook meals to meet all your family members varying meal needs. This app links your shopping and your dinner meal preparation to take away the daily challenge of customising meals to meet the needs of every member of your household.

How: Key features include:

- Advanced AI informs meal suggestions based on current family needs and preferences
- Recommends food swaps based on the food likes/dislikes and dietary needs of each family member
- Recipes are customised to allow for several versions of the meal to be cooked within one session
- Add the missing ingredients to an in-app shopping list
- Built in shopping cart, allows you to use order items on your list, and depending on where you live, have them delivered within the hour
- Allows multiple inputs from family members on changing preferences and needs
- Share, search and save recipes
- Integrated Voice (in the kitchen) and App (on the go) platform
- You tube style "how to" videos

Fig.9

CONCEPT 5

From out of home to in home –Stretch your repertoire meal App

Why: We all know it is hard to break out of the weekly meal routines and try something new. Making meals at home more interesting is a constant challenge for me. I love to try new dishes from takeaways and fancy restaurants or road test new food trends. I would love to be able to do a version of these at home to keep my family's diet healthy and interesting.

What: This new digital food App allows you to recreate great takeaways and restaurant meals at home. A mix of pre-cooked and semi-cooked meal bases, meal kits and recipe databases from all your favourite restaurants to enable you bring out of home food you love in home.

How: Key features include:

- Order meal boxes with ingredients, meal bases or spices to help you re-create a restaurant dish for special occasions
- Order semi-cooked or pre-cooked meal bases
- 70,000 recipes to choose from, regardless of whether it's breakfast, lunch, or dinner
- Works with famous restaurants and takeaways – delivery if you can't be bothered cooking
- You can add your own notes, tips, and substitutions for any recipe
- Helpful videos and photos from Food Network chefs and shows. You can also search for what you want or need by chef or ingredient
- Integrated Voice (in the kitchen) and App (on the go) platform

Fig. 10

CONCEPT 6

Cooks assistant –Stretch your meat and meal skills App

Why: I really want to get better at cooking the food I love – the basics and new dishes as well. I need to step up to master some techniques that will help me eat better and enjoy nutritious tasty food at home. But I don't know where to start and recipes leave me bored! I want it fast, easy and inspiring.

What: An integrated cooking and shopping App that helps me shop, plan and learn meat cooking skills – from the basics through to advanced techniques so that I can get the best flavour, recreate tastes I love, and give me a new direction in food. Makes cooking easier for all home cooks, regardless of how much experience they may have!

How: Key features include:

- Access to more than 50,000 food recipes built on the basics through to cuisines, special occasion OR everyday meal ideas
- Follow top food bloggers and chefs for guidance and inspiration
- Makes suggestions and curates based on your skills and repertoire
- Grocery links to meats, bases, kits
- Delivers weekly meal kits, opt-in when you need
- Allows ingredient swaps depending on your dietary goals
- Easy adjustment of instructions based on number of serves
- Each recipe comes with step-by-step video instructions and an accompanying set of photos, videos, voice commands, and timers
- Share creations with the rest of community
- Integrated Voice (in the kitchen) and App (on the go) platform

Each concept was tested amongst a sample of n=450 of Australians. To be included in the research respondents had to be the *main or joint cook at home, must cook at home at least 3 times a week AND use an app on smartphone more than 5 times a week*. Quotas were placed on age and location. The methodology employed was sequential monadic testing, with each respondent evaluating 3 concepts, resulting in a total number of 75 evaluations of each concept.

The concepts were evaluated utilising Ipsos’ Vantis methodology, with concepts being compared to a database of over 25,000 concepts; the largest database of non-CPG concepts globally. These concepts were specifically compared to similar concepts tested, with a total of 141 relevant concepts in our database. The approach was Vantis Ideas testing, which is a tool for prioritising ideas and determining which are most likely to succeed. Four key metrics are included in the evaluation, being;

- **Seek Information:** Does the innovation motivate a call to action?
- **Liking:** Do consumers find the innovation appealing?
- **Uniqueness:** Does the innovation provide unique benefits versus competitors?
- **Need:** Does the innovation address a consumer need?

The results of the quantitative testing indicate that there are two concepts that show clear potential for development. There are key elements of the other four concepts that resonated with consumers and can be developed further. This will be discussed in detail in the next section of the Milestone Report.

The overall results were as follows:

Fig.11

INNOVATION PROFILE AND VANTIS OPPORTUNITY SCORE

ARCHETYPES	VANTIS OPPORTUNITY SCORE	DIAGNOSTICS				ARCHETYPE DESCRIPTOR
		SEEK INFORMATION	LIKING	UNIQUE	FULFIL NEED	
COOKS ASSISTANT - Stretch your meat and meal skills App	AVERAGE 105	▲	▲	▲	▲	AVERAGE These innovations are moderate across the board, so not too inspiring, but perhaps can work if benefits can be improve.
CUSTOMISED FAMILY MEALS - Managing family meal preferences App	AVERAGE 94	▲	▲	▲	▲	
SPOTIFY FOR DINNER - what should we have for dinner tonight?	AVERAGE 74	▲	▲	▲	▼	REWORK Something is working, but not clear enough to generate strong need. Potentially, they could be reworked to generate broader interest but should be considered a lower priority.
FROM OUT OF HOME TO IN HOME -Stretch your repertoire meal App	AVERAGE 58	▲	▲	▲	▼	
RED MEAT SUCCESS EVERY TIME - Perfect red meat cooking App	REWORK 53	▼	▲	▲	▼	RESTART These innovations perform poorly and should be stopped.
IN STORE PROTEIN PAL - Red meat/Protein health and nutrition guidance App	RESTART 44	▼	▼	▲	▼	

Fig.12

CONCEPT PERFORMANCE ON KEY MEASURES

	COOKS ASSISTANT (A)	CUSTOMISED FAMILY MEALS (B)	SPOTIFY FOR DINNER (C)	FROM OUT OF HOME TO IN HOME (D)	RED MEAT SUCCESS EVERY TIME (E)	IN STORE PROTEIN PAL (F)
Base (n=)	74	75	75	77	76	76
Seek more information (%T2B Probably/Definitely would)	43%	46%	40%	39%	34%	38%
Overall liking (%T3B Like quite/very/extremely well)	62% dEF	58% f	51%	47%	45%	43%
Differentiation (%T2B Very/ extremely)	51%	47%	51%	43%	48%	47%
Solve a problem or fulfil a need (%T2B Probably/Definitely would)	51% cDEF	41%	37%	35%	34%	32%
Believability (%T2B Somewhat/ definitely)	88%	88%	80%	87%	88%	87%
Likely to use (%T2B Probably/Definitely would)	40%	45% e	40%	40%	32%	34%

X significantly better than concept X @ 95% CI
x significantly better than concept X @ 90% CI

5 © 2018 Ipsos. Source: Q1. Seek more information | Q2. Likelihood to use | Q3. Overall liking | Q5. New & Differentiation | Q6. Believability | Q7. Solve a problem or fulfil need
 Base: N=74 to 77 each concept



5 Discussion

5.1 Comparison of Concepts tested and Opportunities for further Optimisation

The Cooks Assistant Concept (Fig.10 / Concept 6), which was focused on helping consumers master cooking techniques to help consumers eat better and more nutritiously, was the strongest performer of all the concepts tested, scoring a Vantis Opportunity Score of 105. The most appealing feature of this concept was the ability to gain *access to more than 50,000 food recipes built on the basics through to cuisines, special occasion OR everyday meal ideas*. Other aspects of appeal were *ingredient swaps depending on your dietary goals, easy adjustment of instructions based on number of serves* and *application of AI to curate suggestions based on your skills and repertoire*. The idea of easy to access tools to help make cooking easier for all home cooks was very appealing. The digital integration and seamless connectivity from shopping through to planning and mastering red meat cooking, speaks to the desire for a frictionless customer journey from inspiration in store through to expertise on the plate.

The Customised Family Meals Concept (Fig.8 / Concept 4), which was a response to the problem of catering to the individual meal demands of increasingly demanding family households (particularly teen/young adult households) was also of interest to Australian consumers. Similarly to Concept 6, the seamless planning, shopping and cooking of meals through digital assistance is of appeal. An App that *links your shopping and your dinner meal preparation to take away the daily challenge of customising meals to meet the needs of every member of your household* is an appealing solution to the customisation of meals within families that we observed very clearly in the qualitative research. The most appealing features of this concept were; *advanced AI to inform meal suggestions based on current family needs and preferences* and the *recommendation of food swaps based on the food likes/dislikes and dietary needs of each family member*. Other aspects of appeal were *multiple inputs from family members on changing preferences and needs*, the ability to *share, search and save recipes* and *YouTube style "how to" videos*.

While the other concepts overall did not show as much promise in this current iteration, many of the key features incorporated were very appealing and this provides clear guidance for MLA for future digitally driven meal inspiration, shopping, preparation, and cooking aids for consumers to encourage consumers to feel more at ease in cooking/working with red meat.

The Key Features to consider are;

- Easy to search for large database of recipes built into the App
- Helpful videos and photos from Food Network chefs and shows. The ability to search for what you want or need by chef or ingredient
- What meat is on sale/fresh/seasonal notifications in grocery/deli/markets near you
- Cooking tips & tricks from the experts
- Integrated cooking solutions include smart oven, slow cooker and pressure cooker for perfect healthy red meat dishes
- Ability to identify whether you are hitting your daily recommended amount of vitamins and minerals with the app's daily food journal

- Personalized recipe and cooking recommendations
- The ability to add your own recipe to see your meal's full nutrition data

6 Conclusions/recommendations

It is therefore recommended that MLA takes the outputs of this comprehensive study to build prototype digital solutions, with partners across the meal journey from 'shelf to stove'. MLA can no brief digital developers, to continue refinement of these key opportunity areas to further build and enhance the features Ipsos has identified as attractive to consumers.

The next stage of iterative design and prototyping must ensure that the digital solutions work to meet the consumer needs and solutions outlined in this report, to ensure that red meat remains part of the diet of increasingly health conscious, convenience seeking, Australian consumers.

7 Appendix – extracts from progress milestone reports

The combined methodology of SMX Social listening and Desk Research yielded a set of key themes to assist understanding of the current Digital Food innovation landscape. The key themes identified included the following:

- Shifting Consumer Food Fundamentals (eg sugar reduction, healthy snacking, food ethics)
- The Connected Food Disruptors: System and Start-ups review (includes kitchen commerce, big data and connected food – e.g. [ATT Connected Life](#), [Campbell's Venture Fund](#), [The Spoon](#), [Spoon Guru](#), [Innit](#))
- Digital Food, Health and Wellbeing (includes augmented transparency labels to visualise what's in the food and/or optimising grocery carts and menu creations; e.g. [shopwell](#); [kabaq](#); [ipiit](#); [my diet coach](#))
- Digitising In-home Food Preparation in the Smart Connected Kitchen (e.g. [Hestan Cue](#); [Tovola](#); [Picnic app](#); [Chefling](#))
- Food Quality Freshness and Flavour – farm to plate sensors, merging slow food with fast tech (e.g. [Foodsniffer](#); [Mouth.com](#); [Foodie trip](#); [Nose to tail](#); Weber iGrill 2 Thermometer).
- Food Sustainability and Substitution (includes food waste, smart fridges– e.g. [Ample harvest](#) ; also encompasses 'clean' cultured/plant based meat.)
- Personalised Nutrition (includes microbiome and personal glucose responses, pheno-/genotyping – e.g. [Habit](#); [Food for me](#))




Appendix III

MLA DIGITAL FOOD IDEATION AND DESIGN WORKSHOP
Trends shaping Digital Food




- 1. Platformification:** Integrated consumer 'platforms' will be the key to system-based digital food innovation.
- 2. Connected systems:** Connected Food+Connected Health.
- 3. New interfaces:** "Alexa, add steak to my shopping list" will disrupt Food/Meal Path to Purchase and Brands.
- 4. Data driven:** AI, wearables will mean joined up consumer, population and food data will enable completely new solutions to current consumer problems...creating new consumer problems!
- 5. IoT of everything:** IoT connecting people, their biodata, their food and their devices is an imminent reality – but consumer adoption will be the challenge. *As always: solve my real problem and show me how it will be easier!*
- 6. New consumer needs:** Cooking aspirations and needs are escalating, so ensuring consumer 'cooking success' is more important than ever.
- 7. Personalised nutrition:** The traditional consumer segmentation rule book is changing: One person will have shifting needs and behave in different ways for many different reasons.
- 8. Empowered consumers:** Empowered and informed consumers means a growing need for 'customizable' meals.
- 9. Waste and sustainability:** Food Waste and single use concerns and sustainability are driving an increased focus on whole system-based solutions to food production, manufacture, distribution and consumption.
- 10. Protein revolution:** Protein revolution will start to impact red meat more noticeably.

MLA DIGITAL FOOD IDEATION AND DESIGN WORKSHOP
What makes a good connected food solution?



Consumer need/s met	What consumer needs does the solution meet?
Tension/problem solved	Does it resolve a red meat +meal+ life problem for our users?
Platform/Product Features	What tech tools does it leverage? What are its key elements and features?
Target Market	Who is our potential target market in terms of needs, psycho/demographics?
MLA Suitable	How does it meet red meat and MLA objectives?
Platform Partners	Who does MLA need to partner with to bring it about?



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MLA DIGITAL FOOD IDEATION AND DESIGN WORKSHOP
The meal "job to be done" is always a functional balance between...




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MLA DIGITAL FOOD IDEATION AND DESIGN WORKSHOP
But a meal always meets emotional needs



Release: Meals are an opportunity to create, to express and affirm self, to bond and nurture their families. Meals are an expressive and creative exercise.

“Me” or “We” drivers are also evident

Control: For others meals are a duty, an exercise that needs to be planned and controlled. A chore that they manage through a rotation of known accomplished dishes



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THE CONSUMER MEAL JOURNEY: TENSIONS AND WORKAROUNDS



	Tensions	Workarounds		Tensions	Workarounds	
INSPIRATION	<ul style="list-style-type: none"> Conflicting family desires Precision Protein inspiration 	<ul style="list-style-type: none"> favourite meal roster, truncated techniques, various food hacks (eg. baking powder) Finder vs decider 		COOKING	<ul style="list-style-type: none"> Health of method Precision 	<ul style="list-style-type: none"> Shallow/occasional frying Tried & tested limited appliances
PLANNING	<ul style="list-style-type: none"> Weekday planning grind 	<ul style="list-style-type: none"> digitally shared lists, 'what's for dinner' afternoon text exchanges 		SERVING	<ul style="list-style-type: none"> Household schedules Protein & veg mix 	<ul style="list-style-type: none"> 4pm/8pm 'shifts' Calorie/diet apps meat free meals, the 'rainbow'
SHOPPING	<ul style="list-style-type: none"> Meat cuts not always in stock at supermarket Freshness fails 	<ul style="list-style-type: none"> supermarket/butcher rotation Inspect meat colour in-store, find trusted butcher 		TIDYING	<ul style="list-style-type: none"> Out of hand mess 	<ul style="list-style-type: none"> One pot/pan cooking, tidy as go, morning prep
PREPARATION	<ul style="list-style-type: none"> Family time schedules Meat handling Various household preferences 	<ul style="list-style-type: none"> Sunday prep, 6am weekday Prep hacks rinsing/wriving of meat rotated meals, 'built up' meals 		LEFTOVERS	<ul style="list-style-type: none"> Food safety Variety vs convenience 	<ul style="list-style-type: none"> 3 day max for leftovers (dated) always make just enough for tonight's meal & next day's lunch

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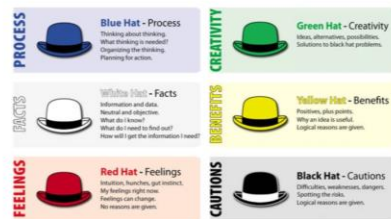
MLA DIGITAL FOOD IDEATION AND DESIGN WORKSHOP
Present, Refine Prototypes



Step 1: Groups to present back 4 Connected Food Solutions each. 15mins per group

Step 2: Whole group works to refine ideas through 6 Hat Lens

- The White Hat calls for information known or needed. "The facts, just the facts."
- The Yellow Hat symbolizes brightness and optimism. Under this hat you explore the positives and probe for value and benefit.
- The Black Hat is judgment—the devil's advocate or why something may not work. Spot the difficulties and dangers, where things might go wrong.
- The Red Hat signifies feelings, hunches and intuition. When using this hat you can express emotions and feelings and share fears, likes, dislikes, loves, and hates.
- The Green Hat focuses on creativity; the possibilities, alternatives, and new ideas. It's an opportunity to express new concepts and new perceptions.



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