



TECHNO *graphics*

The most valuable view of your food customers
...that's hiding in plain sight.

Technographics is an ongoing exploration into how Australians' relationship with technology shapes their everyday choices.

Next on the menu: Food.

This chapter shows how brands (FMCG, recipe websites, grocery, supermarkets, QSRs) can win and stay ahead in this category.



Why it matters:

Demographics won't cut it, you need
the right tools to grasp what matters.



What we've learned so far...

Technographics dishes
out the real drivers.

Demographics alone can't explain food decisions. Tech integration & trust reveal what truly influences planning, shopping, and dining.

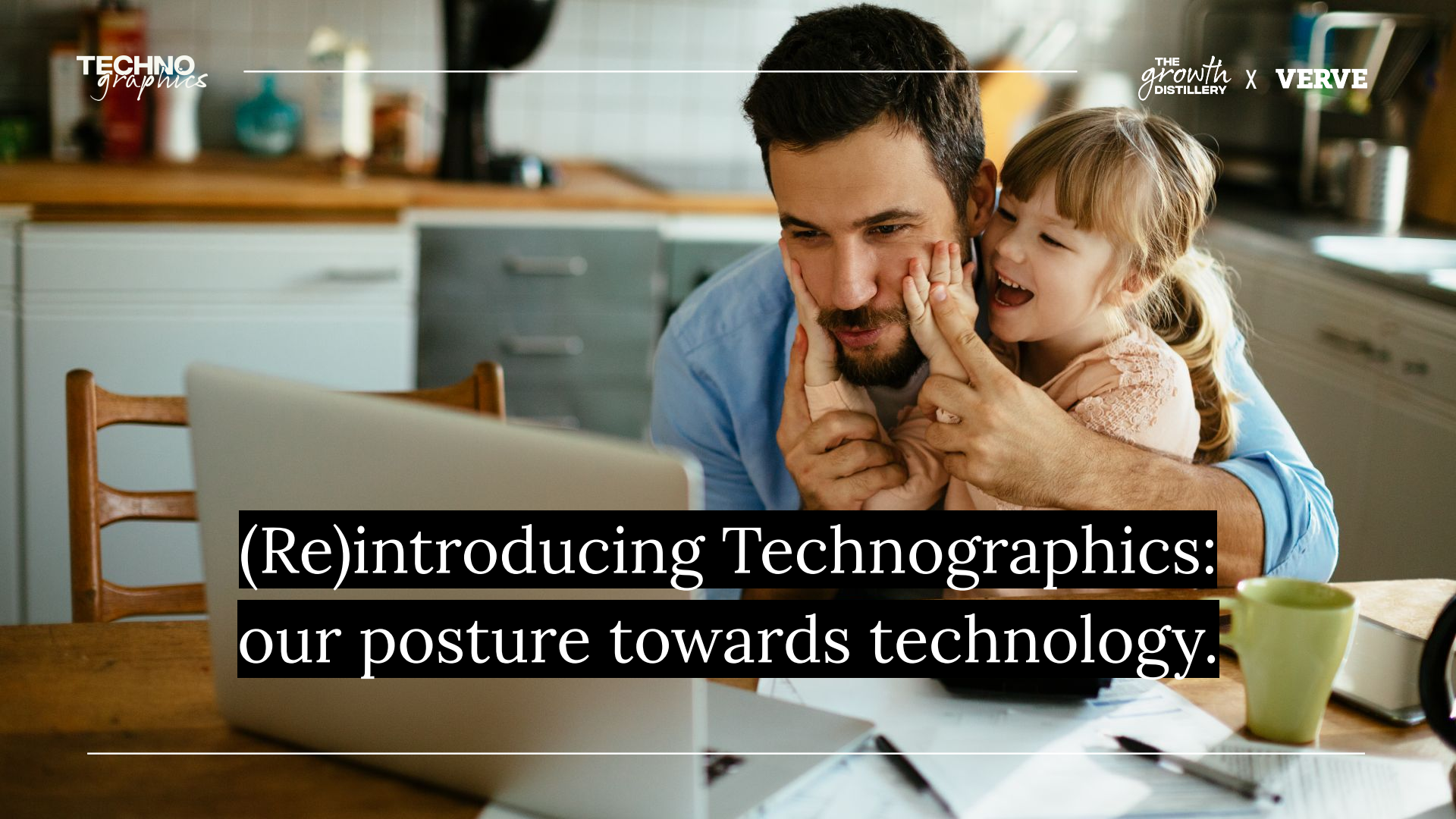


Friction ruins flavour.

Any tech stumble can erode trust and drive customers elsewhere.

Experience is the
differentiator.

The food winners of tomorrow won't just be efficient, they'll be effortless.

A man with a beard and a young girl are sitting at a wooden table in a kitchen, looking at a laptop screen. The man is pointing at the screen with his finger, and the girl is smiling and looking at the screen. The background shows a kitchen counter with various items like a blue vase, a white candle, and a black coffee maker.

(Re)introducing Technographics:
our posture towards technology.

There are six distinct Technographic Postures,
determined by two critical dimensions...

**The level of tech integration
in their lives (A, B, C):**

how embedded technology is in everyday food habits, from using AI meal planners and voice assistants, to browsing recipes and ordering groceries online.

Their trust in tech (+/-):

whether they believe tech improves their food journey or worry about what gets lost such as data privacy or human touch i.e. either tech-trusting vs. tech-sceptic.

Live and love technology. It's deeply integrated, and at the forefront of their decisioning.



Highly engaged but equally sceptical. They're conscious of protecting themselves online.

Appreciate using technology to enhance their lives and are broadly trusting of it.



Moderately savvy, but are nervous users of technology who need reassurance.

Less enthusiastic (and confident) with technology, but trusting once they adopt.



Tech rejectors... As much as they can, they prefer human interaction.

And while...

61%

of Australians are highly
tech-integrated (A+, A-, B+)

It is important to recognise...

54%

of Australians still don't fully
trust technology (A-, B-, C-)

Crucially, one's tech integration does
not always correlate with tech trust.

Brands must cater to varying levels of both
behaviour *and* attitude towards technology.





Why it matters:

Technology now touches every step of
how Australians consume food.

Beware: bad tech spoils the food flow.

40% online grocery shoppers abandon their carts due to a clunky experience

3x likely to choose alternative dining locations if tech feels too cumbersome.

Poorly delivered tech journeys disappoint rather than convert.

Get it wrong and you lose the customer.

Designing great food experiences
means having the right mix of
ingredients during key moments...



Three key stages to build trust – or lose it.

Inspiration & Planning.

where ideas are sparked (cookbooks, recipe websites, apps, social media)



Purchase.

where execution happens
(in-store/online grocery shopping,
digital payments, delivery)



Dine-In Experience.

where technology meets taste and
expectations (digital ordering,
ambiance, service, sense of control)

Let's dig in!

Conventional sources still resonate.

Even the most tech-integrated and trusting (A+) value traditional tools:
72% use cookbooks and printed food magazines, but...



Inspiration is increasingly digital.

Recipe websites and Google search are top sources.

Tech-integrated (A+, A-, B+) lead the way:

- Twice as likely to use recipe apps and websites for meal planning
- Other digital sources include social media (particularly among A-)

Taste.com.au wins online discovery...

- Of those who use recipe websites for inspiration, 52% use Taste
- Recipe sections of supermarkets Coles (31%), Woolworths (27%), RecipeTin Eats (22%) and Delicious (21%) round out the top five.

Yet, inspiration does *not* always lead to action.

The challenge & opportunity:

73% of Australians are actively seeking guidance to boost their confidence in executing recipes.

Winning the customer at Inspiration Stage

To shift from **recipe idea to execution**,
content must do more than entice - it must *equip*.

Highlight prep time & skill level with
step-by-step visuals.

Provide **quick swaps** for dietary
needs and missing ingredients.

Link directly to **shopping lists**.



As much as inspiration sparks intent,
planning is where momentum fades...

Consumers want to feel in control of their meals, but practical barriers get in the way.

Budget constraints

40% of Australians struggle to stay on budget, affecting all technographic postures..

Meal idea fatigue

1 in 3 feel stuck for ideas or unsure what to cook, even after seeking inspiration.

When meal planning works, it naturally flows into the shops.

- Highly tech-integrated (A+, A-, B+) look for **smart features:** ingredient tracking, pantry-aware recipes, AI-powered planning.
- Meanwhile, tech-sceptics (A-, B-, C-) want **approachable formats:** flexible options, clear visuals, budget-friendly meals.



AI is fast emerging as a powerful meal planning tool to turn ideas to action:

10x

growth in AI use with highly tech-integrated leading the adoption



Winning the customer at Purchase Stage



Even at the purchase stage, trust
can erode quickly and baskets can
be abandoned.



High reward, even higher risk.

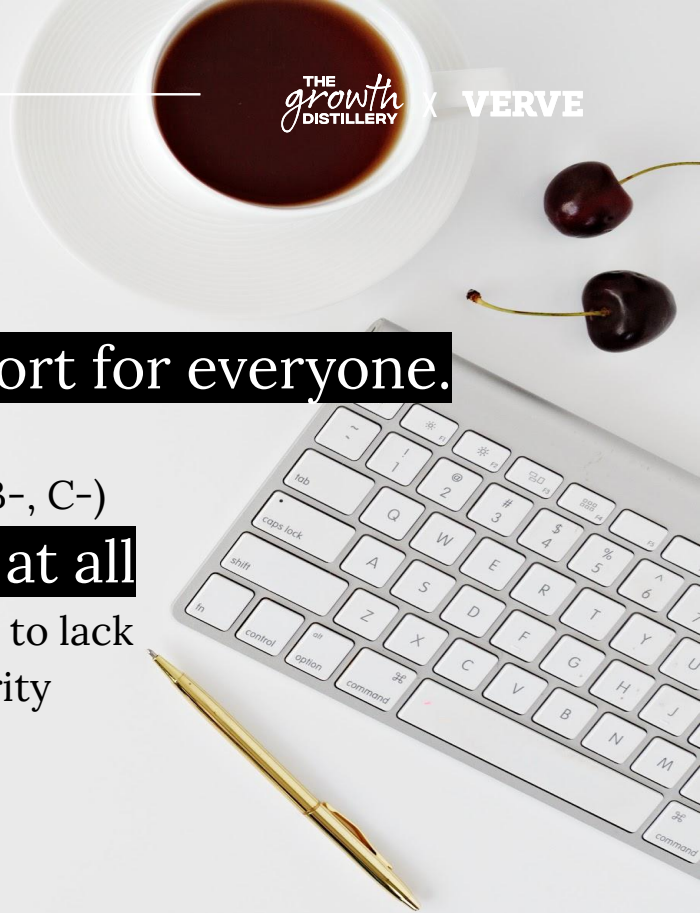
Online grocery is growing yet under increasing scrutiny.
It ranks as least enjoyable & has 40% cart abandonment.

Only 16% feel confident using it
Barely a third trust online delivery
Just 38% would recommend it to others

Here's the real kicker: online falls short for everyone.

Tech-integrated (A+, A-, B+) tend jump in online fast but **churn even faster** when UX disappoints.

Tech-sceptics (A-, B-, C-) **hesitate to try at all** or abandon early due to lack of control or clarity



A man with dark hair and glasses is carrying a young child in a grey baby carrier. They are in a grocery store aisle, with shelves of packaged vegetables visible on the left. The man is looking down at the child with a gentle expression. The child is looking towards the camera. The background is slightly blurred, showing more of the store's interior.

To win at Purchase Stage, brands
must cater to very different needs.

Opportunity #1:

Streamline online shopping
especially for the tech-integrated.



Tech-integrated (A+, A-, B+)

High expectations, low patience.

- Fix clunky UX, load times and navigation
- Show real-time stock + smart substitutions
- Ensure seamless app-web-loyalty integration
- Be transparent: fees, timing, product details

Tech-sceptics (A-, B-, C-)

Low trust, high need for control.

- Reassure on quality: images, videos
- Offer simple interfaces and clear instructions
- Provide choice: opt in/out of substitutions
- Highlight privacy, security, and easy returns

Opportunity #2:

Enhance in-store journeys
especially for the tech-sceptics.



Tech-sceptics (A-, B-, C-)

Seek confidence, not complexity.

- Clear signage and easy-to-navigate stores
- Reassurance around checkout and pricing
- Minimal reliance on unfamiliar technology
- Help from staff when digital tools fall short

Tech-integrated (A+, A-, B+)

Want seamlessness, or else switch.

- Fast and frictionless that respect their time
- Real-time visibility of stock, pricing & rewards

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THE
growth
DISTILLERY x VERVE

The pressure is on in-store
to get it right - every time.

Because when online fails,
in-store pays the price:

96%

shop in-store but many come with
digital standards.

Winning the customer during the Dine-in Experience

A group of people are seated around a long wooden table in a bright, modern restaurant. The room features large windows with blue frames and white brick walls. The table is set with plates of food, glasses of wine, and water. A man in a white shirt is standing and smiling at a woman. The overall atmosphere is warm and social.

Dining is an experience-first category where human connection and atmosphere are vital.

While technology can enhance efficiency, poor implementation may **disrupt the experience** and erode loyalty.



Tech-sceptics (A-, B-, C-):

- Nearly twice as likely to avoid venues with excessive tech
- 3x likely to choose alternative locations if tech feels cumbersome.



Clunky tech doesn't just frustrate,
it actively drives diners away...

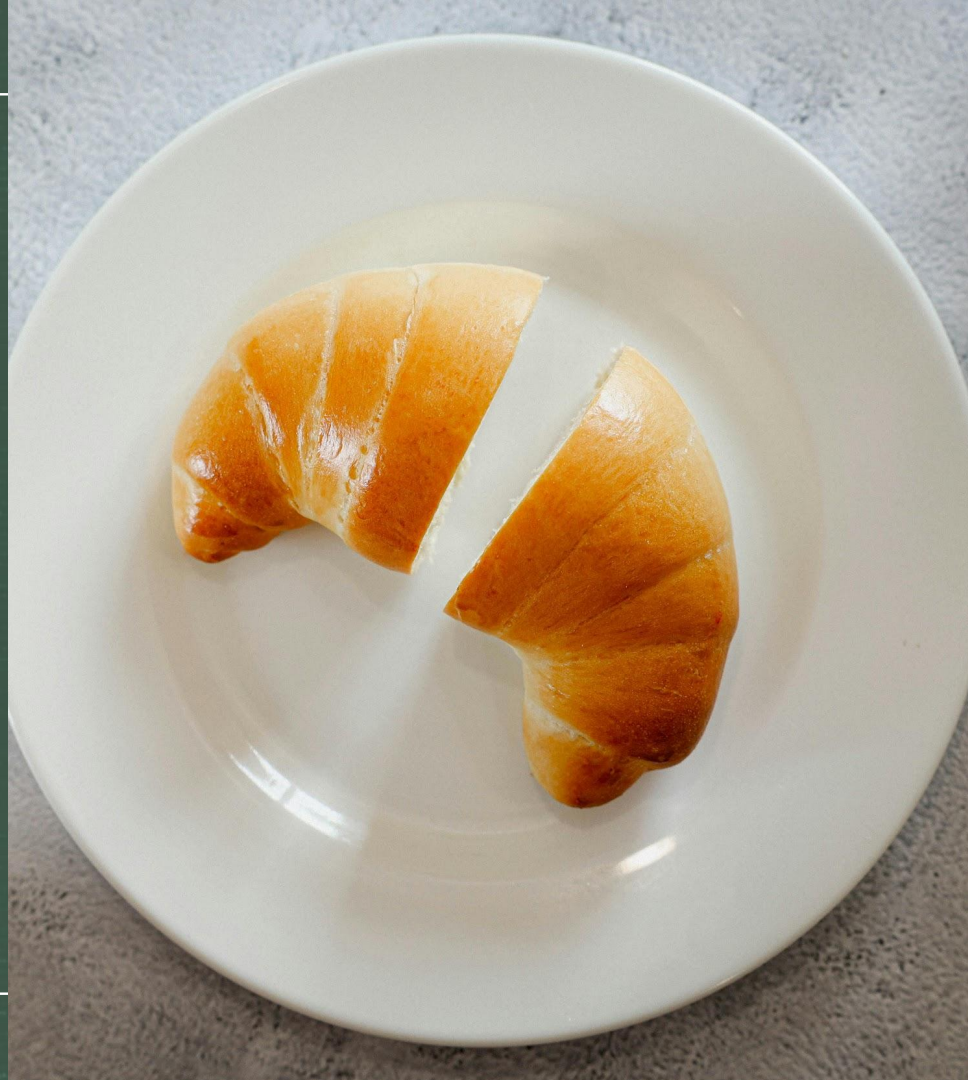
Tech-sceptics (A-, B-, C-)

- 31% **won't return** after a bad technology experience.
- 25% more likely to **share negative encounters** with others.



And even if they stay, diners may push back economically:

- 21% of highly tech integrated **spend less** due to tech friction



A group of people are dining outdoors at a rustic restaurant. They are seated around long wooden tables, some on a raised wooden deck and others on the ground level. The setting is casual, with wooden beams and railings visible in the background. The people are engaged in conversation and eating. A central text overlay reads: "To win the Dine-In Experience, tech must flex with the setting and the diner's expectations."

To win the Dine-In Experience, tech must flex with the setting and the diner's expectations.

Quick Service Restaurants:
Speed matters most.

- Self-service is expected, but must be fast and intuitive.
- Tech-sceptics tolerate digital only when optional and easy.

Cafes and Casual Dining:
Balance is key.

- Some tech welcomed (e.g. bookings, loyalty), however diners value human service.

Fine Dining:
Human touch is non-negotiable.

- Even tech-integrated guests expect minimal visible tech.
- Poorly placed technology can undermine brand prestige.

How to win at...

Inspiration Stage

(FMCG, Recipe Websites)

Convert inspiration into sales

Turn ideas into action with content that's shoppable, personalised & confidence-boosting.



How to win at....

Purchase Stage

(Grocery & Supermarkets)

Win both online and in-store

Remove digital pain points with smarter UX.
Offer hybrid tools and human fallback in-store.



How to win during...

Dine-In Experience

(QSRs, Cafes and Restaurants)

Humanise tech-driven dining

Let diners opt into automation, not be forced into.
Match tech with diner expectations and setting.



A young girl with a nose ring and a yellow shirt is holding a sandwich in her right hand and making a hand gesture with her left hand. She is looking directly at the camera. The background is blurred, showing an outdoor setting with trees and other people.

The future of food will be won by
experience, not efficiency.

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Want to know more?

Ready to unlock the growth potential of your brand? Good, so are we. The Growth Distillery pulls marketers out of chaos and cuts through the clutter, providing the 'need to know' of consumer behaviour.

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To lead in food, lean on technographics.