

Onions Consumer Usage & Attitudinal Study

Executive Summary

August 2021



Study Aim & Methodology

Research Aim: To provide an understanding of consumer attitudes, onion usage, and consumption behaviours to inform the development of both a new onion marketing strategy and the new Onion Strategic Investment Plan.

Methodology: A three-phase methodology was utilised:

1. Quantitative Study: A 'lite' update of 2019 U&A with additional questions on changing consumer behaviour since COVID.
2. Qualitative Pre-task: Self ethnography of onion usage. This task involved both writing about themselves and what matters to them when cooking as well as taking photos and videos of onion usage.
3. Qualitative Focus Groups: Participants took part in an online focus group with 4 other respondents and discussed their cooking and meal preparation. The sessions ran for 2 hours and were moderated by a researcher.



Quantitative Findings (Survey)

- The penetration of onions is high and remains stable at 77% (past 3 months)
- Recent sales increased can be attributed to a marginally increased purchase frequency.
- Almost every family buys onions, but the larger family households don't consume onions in proportion to their size.
- Onions were used more since the start of covid-19 as they fit many of the needs of cooks at this time: affordable, long lasting, versatile and healthy.
- However, covid-19 cooking didn't change the way people used onions – rather it increased usage in already associated dishes such as casseroles and curries.
- 'Gutsy good mood' food isn't strongly associated with onions yet.

Recommended next steps: Understand how to increase frequency of consumption of onions amongst families

Qualitative Findings (Ethnography and Focus Group)

Most families have ingrained habits and attitudes about onion usage:

- They believe that they shop for it routinely and regularly.
- They have a role for onions in their lives (building flavour) and habitually use them as a first step in preparation of many regular family meals. They go so far as to say they are irreplaceable.
- Many have hacks to overcome the main barriers to usage (crying when they cut them, hiding them from fussy kids).
- They know that starting with an onion is the key to 'proper cooking' and they want to do that as much as possible.

Therefore, reminding them to shop for onions, how important onions are to flavour and cooking or how to work around key barriers of tears and fussy kids is unlikely to lead to increased consumption

Entice Consumers to Re-evaluate Onions

The greatest challenge of increasing onion consumption is that they don't think about onions at all. They are not keen to listen to new messages as they already believe they use onions in a multitude of ways.

However, many of the lighter onion users are in fact sticking to a comfort zone where onions are used primarily as a flavour base. Many are surprised when they are challenged to think about onions in applications beyond a sauté. This is compared to heavier onion users, who demonstrated a wider range of onion meals which often have onions as more of a feature than a hidden ingredient.

Unlocking onion usage, therefore, is about **inspiring & enticing consumers to re-evaluate onions**:

- Creating awareness of onions usage OUTSIDE of its staple, flavour base role
- Providing inspiration on how to bring it outside of this role
- To make onions a focus in more meals, rather than the hidden source of flavour.

For older families, these recipes might be meat and vegetables, salad, pasta and rice dishes where frequency is high but onion penetration is low. For younger families, these recipes might be meat and vegetables, salad, pasta, stir fry and rice dishes, where dish frequency is high but onion penetration is low.

Thus, the job to be done is to move onions from a flavour base, to a feature, by inspiring them with new dishes.

Romance of the Cooking Process



Yet there are many different products and brands doing 'meal inspiration', so onions needs something further to help provide a point of engagement to break through the clutter.

What is unique to onions and provides a point of difference versus other vegetables is the *romance of the cooking process*.

- The sound and smell of cooking onions is highly enjoyable, and a signal of the start of a positive meal association, for both the cook and the family.
- Therefore, cooking onions provide the meal provider with positive emotional feedback; of particular importance in the family environment when meal times can be fraught, and catering to a range of different eaters can make them feel disheartened and unappreciated.
- Some cooks also find that cooking with onions is a calming, meditative act at the end of a long day.
- The smell also has strong emotive links to their own childhood experiences.

Thus it is recommended to utilise the strong sensorial and emotional cooking cues *that are unique to onions*, as the engagement hook.

Health Benefits as a Secondary Message

Onion's health benefits are not widely known, and a surprise to many.

Whilst all the benefits were of interest, fighting fatigue is one of the more unique benefits for onions.

Whilst a health message is interesting, it is not recommended as a primary strategic focus because:

- It struggles to gain a unique point of difference within the fruit & vegetable category which is already strongly associated with health.
- It is hard to provide a credible single-minded message – unless a compelling single benefit that has a clear measurable directive can be determined e.g. 'There is as much vitamin C in 1 onion as an orange'
- It is a very rational message - and consumers are irrational beings. In other words, consumers may say that they will change their behaviour for health, but in reality, they are easily swayed by other factors (e.g., taste, convenience).

The health story, however, is a strong secondary message which can help draw attention.

