

**Mushroom Council Ethnographies
Condensed Final Report
August 2006**

BACKGROUND

Objectives

To uncover Consumer insights (from heavy users) in order to inform a consumer insight based, compelling tagline

INSIGHTS:

- What is the "HOOK"?
- What makes the heavy user "tick"?
- How can we motivate medium/light consumers?
- What is the most motivating way to talk to medium/light consumers?

NEXT STEPS: Creative brainstorming followed by Quantitative on-line study

Methodology

- Fifteen in-home in-depth ethnographic interviews (2 hours in length, followed by a one hour "friend pair" interview in the same consumer's home)
- Interviews were conducted weeks of July 8 through July 22, 2006
- Markets: San Francisco, Chicago, and New York
- Target Sample
 - **Heavy Mushroom Consumers** - Purchased mushrooms 3+ times per month, on average, over the last six months (18+ times, past 6 months)
 - **Medium Mushroom Consumers** - Purchased mushrooms 2-7 times over the last six months

EXECUTIVE SUMMARY - WHAT DID WE LEARN?

FUNCTIONAL BENEFITS CONFIRMED

What was already known about mushroom functional benefits was confirmed:

- Low-calorie
- Taste
- Texture
- Elegant
- Versatile
- Unique

TWO BELIEFS WERE OVERTURNED

From relying on recipes/education to.....*The 'Anti-Recipe'*

- "The friendlier onion"
- No need for recipes, goes with anything
- No fail/forgiving (don't need to measure, not possible to overdo)

From "you can be a chef" to....."You don't need to be a *Chef!*"

- Elegant
- The "Kick" (dress up any meal)
- Easy prep/versatile

SARA WILLIAMS & ASSOCIATES

EMOTIONAL (HIGH LEVEL) EMOTIONAL BENEFITS UNCOVERED

THEMES: 1) *Hidden Treasure* 2) *Behind the Scenes Hero* and 3) *“Back to Basics”*

1. ‘Complete Satisfaction’

- “Stick-to-itiveness”/hearty/filling
- Rich, fulfilling taste
- No snack or “hunting” after dinner
- Move on with evening satisfied

3. ‘Back to the Basics

- Nutty woody taste
- Outdoor imagery (sensory)
- Connects me with earth/simplicity/low stress

5. Low Calorie - 4 health elements = Nurturer, “Feel Good”

- Subtraction of the negative
- Health “nod”
- Easy to digest/goes down easily
- Addition of the positive

6. Taste - Dichotomy

- Complex/layered, earthy, YET
- Subtle (absorbs partner flavors)

7. Texture - “Almost indescribable”

- Mouthwatering
- Smooth/easy to digest
- Substantial “bite into”

9. Versatile - ‘Any dish’/any season

- “Around the world” (any dish)
- All-season (winter/summer)
- Sauté/chop and toss (easy)

HOW HAS OUR LEARNING EVOLVED?

WHERE WE WERE: *Reducing FEAR/Barriers*

NON-USERS

- It’s a fungus
- Dirty/ugly
- Consumers don’t know what to do with them – or even how/where to start (how to cook, clean, store and prevent from spoiling).

LIGHT USERS = APATHY

Restrained usage

- Use mushrooms only when a recipe calls for them
- See cooking as stressful and necessary for survival as opposed to fun or free
- Believe mushrooms have bland flavor
- Don’t know how to even start using mushrooms more broadly in their life!

WHERE WE ARE NOW: *Increasing the “WOW” (vs. reducing barriers) –MUSHROOMS ARE A HIDDEN TREASURE!*

- Heavy/medium users describe the feelings of joy, relaxation, freedom and creativity that mushrooms provide!
- They cite mushrooms as ‘the anti-recipe’, with an original taste and texture that adds definition and substance to foods
- For these folks, mushrooms are versatile with a rich, deep, complex flavor – and provide a ‘kick’ for any meal
- Mushrooms help them get ‘back to basics’ - - connected with earth and simplicity
- Provide a sense of ‘complete satisfaction’ – a stick-tu-itiveness that is rich and filling.

CONCLUSION: We need to focus on value (the “wow” factor) not breaking down barriers. Consumers need to know what’s on the other side!

400 BEALE STREET, SUITE 1404, SAN FRANCISCO, CA 94105

SARAWILLIAMSASSOC@SBCGLOBAL.NET

PHONE: 415.203.9868

DETAILED LEARNINGS

Three Main Functional Benefits

#1 - Taste

- 'Complex'
- 'Earthy'/'woody.'
- Subtle flavor, takes on (absorbs) 'partner flavors' of the foods it is cooked with

#2 - Texture

- Smooth
- Easy to digest
- Mouthwatering
- Substantial – you can 'bite into them'

#3 - Health

A health claim is critical...consumers need to know exactly what's in there!

1. SUBTRACTION OF THE NEGATIVE - Fresh, Pure, Natural (no additives), No fat, No calories
2. PAT ON BACK/CUE/HEALTH "NOD" – "I did good," "Balances the other (bad) foods I eat," "feel good serving self/family"
3. EASY TO DIGEST/GOES DOWN EASILY
4. **HEALTH (ADDITION OF THE POSITIVE), HOWEVER, IS UNCLEAR TODAY....**
 - **FORTIFICATION/"WHAT'S IN THERE" IS UNCLEAR – no-one interviewed knew what was in the mushroom - "There must be fiber and/or vitamins, but I don't know which" (vegetable halo only), "there must be god stuff or some type of nutrients in them"**
 - **Even heavy consumers don't know exactly what vitamins, minerals or nutrients mushrooms contain – we need to educate them!**

Mushroom Benefits are In Line With Food Trends

Mushrooms are on-trend. Emotional benefits are strong and "fit" with what's important to consumers today (emotional depth and a return to the basics)!

Trends in the 80's and 90's – Functional benefits

- Subtraction of the negatives – Low fat, sugar, cholesterol, calories (examples: Healthy Choice Brand, Diet Soft Drinks)
- Addition of the positives (examples: OJ with calcium, fortified foods, nutrition bars)

TODAY'S TREND: Emotional benefits/depth and a return to the basics

- Self help, Depth, Meaning, Peace of Mind, Freedom (examples: Yoga, Natural/Organic foods)

NOTE: 6 compelling emotional benefit areas for the mushroom were uncovered in this ethnographic research. "Higher order, or emotional benefits are more likely to drive the motivation to buy and the decision process [vs. functional elements]" (Reynolds & Gutman).

Emotional Benefits Uncovered in Research – SIX THEMES

'Back to the Basics' or a connection with earth.

- Nutty woody taste and outdoor imagery. “I can smell the trees,” or “I can actually feel the grass on my feet”.
- Mushrooms provide simplicity and a connection with the earth. They take users away from stress and back to “the way things are supposed to be where we live off the land.”

'The anti-recipe'

- Mushrooms are seen as “the friendlier onion” - a no fail or forgiving ingredient
- They don't need to be measured and it's not possible to overdo them
- They go with everything

Juxtaposition of Simple and Complex

SIMPLE

- Subtle flavor
- White/basic
- Soft
- From the earth
- Pure (no additions/preservatives)
- Easy to use

COMPLEX

- Complex/dramatic –
 - Rich, deep, complex flavor - “Layers of complexity like fine wine”
 - The white color seen as dramatic versus other (colorful) fruits and vegetables
 - Many different types of mushrooms
- Versatile - They go with anything “all around the world.”
- All season (available fresh all year round)
- “Kick”/Original - They dress up dishes and meals, yet also seen as a very functional ingredient - ‘business casual’ as opposed to ‘black tie.’
- Original texture (smooth, spongy)
- Original taste - original and takes on the flavor of other foods (mushrooms are a cross between a spice and a food)

The Hidden Treasure!

Heavy users see mushrooms as a “wow” and a reward (vs. the FEAR of the non-user and the APATHY of the light user)!

- They described feelings of joy, relaxation, freedom and creativity that mushrooms provide
 - They're quick and it's easy to “pop them in” a dish
 - There's anticipation followed by reward when using mushrooms
 - Peace of mind – users feel good about serving this healthy option to their families
- ‘The anti-recipe’
 - Mushrooms are seen as “the friendlier onion,” and a no fail or forgiving ingredient. They don't need to be measured and it's not possible to overdo them; they go with everything.
- They give any dish that “KICK” (shoulder shimmy)
- Original taste/texture - Unique taste alone, and also allows the mushroom to take on the flavors of foods it's cooked with
- Adds definition and substance
 - Unique personality – there is no replacement!
 - White color is dramatic
 - They have a “different” shape
 - Are filling and mushroom chunks look substantial and add definition to dishes
- Versatile – they go with anything and are available all season
- Rich, deep, complex flavor
- ‘Back to Basics’ (connection with earth)
- “Complete satisfaction” (stick-tu-itiveness, rich, filling)

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“Free to Be Mushroom and Me” (“You don’t need to be a chef!”)

- *Mushrooms are both VERSATILE + A FORM OF CREATIVITY, EXPRESSION AND FREEDOM*

Heavy users tended to have eaten mushrooms as child and cook with them as a form of expression

- Mom cooked mushrooms, using freely on everything
- Confident (rarely use recipe)
- Add spices and mix and match using intuition
- Cooking is joyful

NOTE: Light users are far more restricted!

Heavy users also cite mushrooms’ versatility

- Go with everything (“the friendlier onion”), don’t overpower or compete with other foods/spices, and don’t need to be measured – you can use a little or a lot
- Are ‘all around the world.’ They’re cultured and go with all kinds of dishes
- They have heritage – “been around for years”
- Multi-seasonal and always in season. In the winter sauté, bake, simmer (emotional, “like a hug”), summer usage is less emotional (grill, salad, etc.)

Immediate and Lasting Satisfaction – Completeness and “Stick-tuitive-ness”

Ease and anticipation meets emotional and physical completeness

PREPARATION/ANTICIPATION

- The great smell “fills my kitchen,”
- Easy prep - I just sauté or ‘pop in’ and I’m done
- Creates a sense of excitement – ‘I know I’ll be eating soon.’”

PAYOFF = COMPLETENESS

- “Sticktuitiveness” - Meaty, hearty, substantial and filling
- Taste - Rich, complex
- Nurturing – “I feel good serving to my family”
- Not hunting for snacks after dinner!
- Satisfied and move on with my evening (enjoy self/family after a long day vs. slaving in the kitchen)

PERSONIFICATION

Heavy mushroom consumers see mushrooms as having a creative, charismatic nature with friendly, familiar, fresh and pure underpinnings.

Charismatic

Unique and hard to describe/not like anything else. They are their own person and represent personalities that are confident yet subtle because they’re strong in texture and add something significant to any dish.. They have a big impact and are the life of the party. Mushrooms are versatile....like the “new mysterious woman everyone wants to know.”

- Examples include larger than life personalities:
 - Harry (a character from *Sex and the City*)
 - Arnold Schwarzenegger

Creative and bold

Adventurous and spontaneous - “Once you taste me you will never forget me.” They are also seen as adaptable and unpredictable and a person who makes his/her own style.

- Examples include a Parisian artist and the female opera singer Kiri Takanawa

Friendly and Familiar

Family oriented and social because they grow in groups and like company in food. Mushrooms are warm and inviting, easy-going and casual, like a “real” person. They’re dependable because they’re always in season and always make things taste great.

- Examples include a Smurf, Dumbo, a sister or Marco (a friend)

Fresh/Pure

They are fresh and natural with no make-up and natural, simple clothing; They are earthy and woodsy, attractive but not made up as well as fresh, clean, youthful, innocent and understated.

- Examples include baby peaches, a lumberjack (like Paul Bunyan), or a girl who likes dining al fresco.

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APPENDIX – ADDITIONAL LEARNINGS

MUSHROOMS = SOCIAL CONNECTION

Connection to people - Reminder of past social times and a gateway to future friendships.

- Mushrooms remind consumers of family meals and holidays as child
- The first time they tried (and liked) mushrooms was at restaurant with friends, sharing a mushroom pizza, or trying mushrooms at a friend's house
- Mushroom's are a social gateway through word of mouth (as in 'you have to try this') and provide a way for friends to connect.

...And they are social themselves!

- They mingle well (absorbing their partners' flavors)
- Versatile and go with anything. - "around the world," a "chameleon," (all types of foods)
- Been around for years"
- Provide a magnet or glue, bringing together foods, components and combinations
- Mushrooms add to the cooking experience and it's the "coaxing" of the mushroom that heightens smell/taste - - it's what you do to them in many cases (examples include sautéing with garlic, butter and/or onion or simmering in gravy/soup – the smell fills the room and the buttery subtle flavor cannot be beat.

DECISION TREE – HOW DOES A CONSUMER SHOP FOR MUSHROOMS?

LEVEL: DECISION:

Level 1 – White button vs. Portobello vs. Specialty?

Level 2 – Bulk vs. container?

Level 3 – Whole vs. sliced?

Level 4 – Container size

Level 5 - Price