

# Mushroom 2022 Tracking Study

## **Final Report**

Mushroom Council  
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**Project Background**

Mushroom Council Marketing activities and budgets have focused on marketing The Blend and General Mushrooms. As the Council adopts a more measured approach to marketing evaluation and planning, two types of regular research have been recommended. One is a larger scale consumer usage and attitudes study and the other is a periodic smaller tracking survey.

The consumer usage and attitudes study should be repeated every three to five years depending on the marketing team's information needs for strategy, planning, and executional support. Separate usage and attitudes studies should be completed for The Blend and General Mushrooms on alternating schedules.

The tracking surveys should be repeated every other year to support the regular setting and assessment of marketing goals and KPIs.

**Project Objective**

A larger scale consumer usage and attitudes study was completed for General Mushrooms 2018. In the 2018 study, baseline measures were identified and data captured for General Mushrooms goals and KPIs.

The objective of the present research project is to field a General Mushrooms tracking survey in Fall 2022, three years after baseline measures were established.

**Research Methodology**

A subset of questions was pulled from the Fall 2018 General Mushrooms usage and attitudes study and developed into a smaller survey. Several questions-of-the-moment were also included to provide information to current discussions and decisions.

This Fall 2022 tracking survey was fielded with a sample of 1251 respondents representative of the US population.

When reading results, a margin of error of 3-4% should be used. Changes that are less than 3-4 points are not statistically changes.

**Key Learning**

**1** Overall, results show a shift to a lower frequency of fresh mushroom consumption in 2022 (82%) compared to 2018 levels (93%). This shift appears in a few places in the data. Fresh mushrooms have shifted to a higher price perception for about 10% of shoppers. The percentage of shoppers that Definitely or Probably would buy fresh mushrooms has dropped from 71% in 2022 to 66% in 2018.

**2** But perceptions and attitudes do not show a decline in mushroom interest, use, or value. Measures of fresh mushrooms' status as a kitchen staple remain constant. The percent of people willing to pay more for fresh mushroom has increased from 19% in 2018 to 25% in 2022 indicating the value perception of mushrooms is sustaining. Perceptions of healthy, sustainability, and flavor have all remained stable since 2018. Mushrooms were one of the foods with lower intended spending reductions due to inflation.

**3** I interpret this as mushroom purchases experiencing a short term decline due to budget pressure on some households from higher food prices overall, and not a long term decline in the consumption of fresh mushrooms. This corresponds with a noticeable shift to lower priced and alternative food stores away from traditional supermarkets. Wal-Mart has received the largest part of the shift.

**4** Findings indicate that marketing and merchandising efforts are still bringing in new consumers and uses. The number of shoppers who have started consuming mushrooms within the past 2 years has increased from 8% in 2018 to 19% in 2022. There has also been a noticeable increase in consumers using mushrooms in special recipes and occasions. Although awareness of the Blend has not increased, trial has increased to about 55% compared to 18% in 2018.

## Unaided Awareness & Penetration (All 1251 respondents)

Please list **five** vegetables from a supermarket **Produce Department** that can be part of a meal prepared at home.

	2018	2022
Mushrooms	9%	8%

Unaided mention has remained stable.

In the past year, which if any of the following types of food products have you purchased or consumed?

	2018	2022
Fresh mushrooms	76%	60%
Yogurt, milk or other dairy products	95%	91%
Pickles, olives and peppers	88%	81%
Fresh vegetables	97%	95%
Meats and cold cuts	94%	88%
Fresh fruits	97%	92%

There has been a drop in aided mention of mushroom purchases compared to 2018

How frequently do you purchase fresh mushrooms for consumption **IN YOUR HOME?** (e.g. as a dish or ingredient in a meal)?

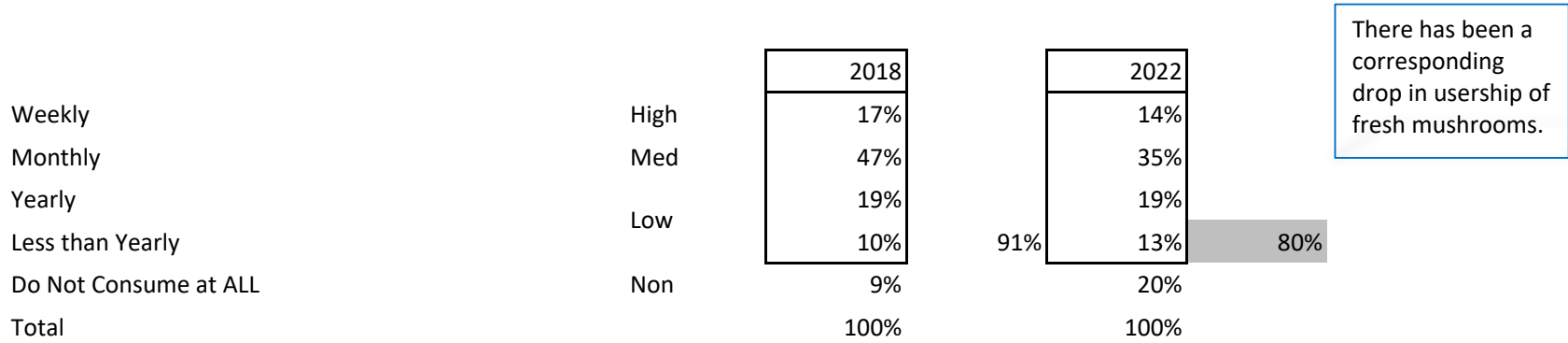
		2018	2022
Weekly	High	29%	25%
Monthly	Med	42%	39%
Yearly	Low	12%	9%
Less than Yearly	Low	11%	8%
Do Not Consume at ALL	Non	7%	18%
		100%	100%

93%

82%

There has been a corresponding drop in usership of fresh mushrooms.

How frequently do you consume mushrooms prepared **AWAY FROM HOME** (e.g. as a dish or ingredient in a restaurant meal)?



## Use/Consumption (1023 Mushroom Users Only)

When did you **first begin purchasing** fresh mushrooms for consumption in your home?

	2018		2022
Within the past year	4%		11%
More than one year ago	5%	8%	8%
More than two years ago	8%		9%
Many years ago	84%		73%
Total	100%		100%

There has been a significant increase in first time use compared to 2018.

**How** do you typically use fresh mushrooms purchased for consumption in your home? Select all that apply.

	2018	2022
Special occasion or holiday meal	17%	23%
For a special recipe	36%	43%
For a specific meal/dish I regularly prepare	51%	56%
As a staple in my kitchen for multiple uses	40%	41%

Special use of mushrooms has increased.

Would you now say you are using more, less or about the same amount of fresh mushrooms in your food preparation compared to one year ago?

	2018	2022
More	25%	25%
Less	6%	13%
About the same	70%	61%
Total	100%	100%

Some people are using less mushrooms compared to 2018.

How much would you agree with the following statements about yourself regarding fresh mushrooms?

	2018		2022	
	Top 2Box	Average	Top 2Box	Average
You often include mushrooms on your grocery list	32%	6.4	32%	6.6
You always or like to have mushrooms on hand	29%	6.2	30%	6.5

Staple status is holding stable.

## Mushroom Shopping (1023 Mushroom Users Only)

Where do you typically **purchase fresh mushrooms** for consumption in your home? **ALL places.**

	2018	2022	Chng
Traditional Supermarket	81%	75%	-5%
Wal-Mart Store/ Supercenter	39%	47%	8%
Value/Discount Supermarket	16%	23%	7%
Other Supercenter (i.e. Super Target, Meijer, etc.)	17%	22%	5%
Whole Foods	18%	20%	3%
COSTCO	14%	20%	6%
Trader Joes	18%	18%	0%
Natural Food Store/Farmers Market	13%	16%	3%
Limited assortment store (i.e. Aldi, Sav-a-Lot, etc.)	11%	15%	4%
Other Warehouse Club (/Sams/BJs)	11%	14%	3%
Small/neighborhood grocery store	10%	14%	4%
Online grocers	3%	11%	8%
Gourmet/Specialty Foods Store	6%	9%	3%
Dollar store (i.e. Family Dollar)	3%	9%	6%
Convenience store	2%	7%	5%
Other	3%	5%	3%

Noticeable shift to lower priced stores and alternatives away from traditional supermarkets.



Where do you typically purchase fresh mushrooms for consumption in your home? **PRIMARY** place.

	2018	2022	Chng
Traditional Supermarket	61%	52%	-9%
Wal-Mart Store/ Supercenter	14%	20%	6%
Value/Discount Supermarket	3%	5%	2%
COSTCO	2%	4%	1%
Other	1%	3%	2%
Other Supercenter (i.e. Super Target, Meijer, etc.)	2%	3%	0%
Whole Foods	3%	3%	0%
Limited assortment store (i.e. Aldi, Sav-a-Lot, etc.)	3%	2%	0%
Natural Food Store/Farmers Market	2%	2%	0%
Other Warehouse Club (/Sams/BJs)	1%	2%	1%
Trader Joes	2%	1%	-1%
Online grocers	0%	1%	1%
Small/neighborhood grocery store	1%	1%	0%
Gourmet/Specialty Foods Store	0%	1%	0%
Dollar store (i.e. Family Dollar)	0%	0%	0%
Convenience store	0%	0%	0%

Noticeable shift to Wal-Mart and alternatives away from traditional supermarkets.

How often do you buy Fresh Mushrooms online?

	2022
Weekly	13%
Monthly	17%
Yearly	7%
Less than Yearly	4%
Do Not buy Fresh Mushrooms online	55%
Do Not buy Fresh Mushrooms at all	4%
	100%

For fresh mushrooms, are you willing to pay a higher price than other products in the Produce Department?

	2018		2022	
1 = Not at All	12%	24%	13%	24%
2	5%		4%	
3	8%		7%	
4	10%	57%	6%	51%
5	20%		20%	
6	14%		12%	
7	13%		13%	
8	10%	19%	9%	25%
9	4%		6%	
10 = Very Much	5%		11%	
	100%		100%	

Price permission is increasing slightly for mushrooms.

## Perceptions/Attitudes (All 1251 respondents)

To what degree were you **AWARE** of the following about fresh mushrooms?

	2018		2022	
	Top 2Box	Average	Top 2Box	Average
Consuming fresh mushrooms contributes to better nutrition and health	38%	7.3	35%	7.1
Mushrooms are a highly environmentally sustainable crop to produce	29%	6.6	32%	6.8
Mushrooms add a lot of flavor to a meal or recipe	45%	7.6	41%	7.4
Mushrooms are a moderately priced produce item	30%	7.1	27%	6.8
Mushrooms are a popular food	31%	7.1	31%	6.9
Mushrooms are a versatile food; they can be used in many ways	49%	7.9	44%	7.6

There have been only slight changes in attitudes towards mushrooms.

How important or **VALUABLE** to you/your family are the following about fresh mushrooms?

	2018		2022	
	Top 2Box	Average	Top 2Box	Average
Consuming fresh mushrooms contributes to better nutrition and health	40%	7.4	39%	7.1
Mushrooms are a highly environmentally sustainable crop to produce	30%	6.8	30%	6.6
Mushrooms add a lot of flavor to a meal or recipe	44%	7.5	41%	7.2
Mushrooms are a moderately priced produce item	33%	7.1	30%	6.8
Mushrooms are a popular food	25%	6.2	28%	6.4
Mushrooms are a versatile food; they can be used in many ways	44%	7.6	40%	7.2

How does the **regular price** of fresh mushrooms compare to other fruits and vegetables in the Produce Department?

	2018		2022	
1 = Priced much lower	4%	16%	2%	6%
2	4%		1%	
3	9%		3%	
4	10%	76%	6%	78%
5 = Priced about Average	50%		53%	
6	9%		9%	
7	8%		10%	
8	5%	7%	8%	16%
9	1%		4%	
10 = Priced much Higher	1%		4%	
	100%		100%	

Mushroom pricing is perceived as noticeably higher for some compared to 2018.

If you were shopping today and fresh mushrooms were available at an acceptable price, how likely would you be to buy them? Would you say you...?

	2018		2022
Definitely would buy fresh mushrooms	<b>47%</b>	71%	<b>43%</b>
Probably would buy fresh mushrooms	<b>25%</b>		<b>23%</b>
Might or might not buy fresh mushrooms	18%		15%
Probably would not buy fresh mushrooms	5%		7%
Definitely would not buy fresh mushrooms	5%		12%

Mushroom purchase intent is lower compared to 2018.

## Blend & Vit D (All 1251 respondents)

Have you **HEARD** of the concept of "**Blending**" ground or diced mushrooms into ground meat to create a new version of traditional meat meals.

Think, for example, of a "**Blended**" Burger that has about 70% ground beef and **30% mushrooms** "blended inside" when preparing the patties.

	2018	2022
Yes, I have heard of this concept	39%	38%
No, I have not heard of this concept	61%	62%

Blend awareness is stable compared to 2018.

Have you **TRIED** of this concept of "**Blending**" ground meat and ground or diced mushrooms together to make burgers, meatballs, tacos, etc.?

*Based on the 471 that have heard of the Blend.*

	2018	2022
Yes, I have tried this concept	18%	55%
No, I have not tried this concept	82%	45%

There is a significant increase in Blend trial compared to 2018.

Are you aware of special fresh mushrooms that are **HIGH in VITAMIN D**?

	2018	2022
Yes	26%	38%
No	74%	62%

There is a significant increase in Vitamin D awareness compared to 2018.

## General Shopping (All 1251 respondents)

Due to inflation driven budget concerns, how will your spending on the following grocery products change over the next 6 months?

	2022		
	Reduce	Same	Increase
Steak	30%	60%	10%
Desserts	27%	64%	9%
Seafood	26%	64%	10%
Eggs	16%	72%	11%
Berries	14%	75%	11%
Ground meat	14%	76%	10%
Coffee	13%	77%	9%
Mushrooms	12%	75%	13%
Cheeses	9%	81%	10%
Potatoes	8%	81%	11%
Onions	8%	83%	10%

Inflation seems to have a lower impact on intention to purchase mushrooms in the future. And may have the highest increase intention.

How often do you buy **groceries** online?

	2022
Weekly	19%
Monthly	21%
Yearly	5%
Less than Yearly	7%
Do Not buy groceries online	48%



In the past 6 months have you ordered groceries more than once from any of the following services? Choose any that you have used.

	2022
Walmart	33%
Your supermarket	23%
Amazon Fresh	16%
Instacart	14%
DoorDash	10%
FreshDirect	4%
Shipt	3%
Other	39%

## Marketing/Media (All 1251 respondents)

In the past 6 months have you used any of the following sources for recipes? Choose any that you have used.

	2022
AllRecipes.com	37%
FoodNetwork.com	30%
Pinterest.com	21%
Delish.com	13%
BonAppetit.com	12%
Epicurious.com	6%
Other	34%

Please rank the following topics or themes in terms of how interesting and motivating they would be for you to purchase more mushrooms. Click & Drag the most interesting and motivating to the top.

	2022
Feed your immune system with mushrooms	2.6
Mushrooms 201: recipes and tips for using mushrooms	2.8
Blend mushrooms and meat for more delicious, nutritious and sustainable meals	2.9
Mushrooms are the answer to rising food costs	3.3
The mushroom sustainability story	3.5

The lower the average ranking here, the closer to number 1 or top ranking.

\* A smaller score is closer to a number one ranking.

## General Food/Values (All 1251 respondents)

How much would you agree with the following statements about yourself regarding fresh mushrooms?

	2018		2022		Target Customer Dimensions
	Top 2Box	Average	Top 2Box	Average	
I am able and find it easy to make changes toward a healthier diet for me (and my family)	33%	7.1	28%	6.7	Healthy Eating
I enjoy and have no difficulty cooking and preparing meals at home for myself (and my family)	51%	7.7	43%	7.5	Cooking
In general, I have a strong interest in new foods or ingredients, they matter a lot to me	34%	7.0	26%	6.5	Food Orientation

Please select the **FIVE most important** things you consider when **food shopping and preparing meals**. Select Five.

	2018	2022
Price	84%	83%
Ingredients/taste/flavor	87%	82%
Health/nutrition	84%	75%
Convenience, ease of preparation	70%	67%
Locally sourced or produced products	32%	33%
Natural & Organic products	32%	32%
Indulgent and fun	22%	31%
New/unique/different	26%	27%
Non GMO (genetically modified foods)	26%	23%
Environmental sustainability	13%	21%
Kid friendly	18%	16%
Gluten free products	6%	10%

How has your **red meat** consumption changed over the past year?

	2016*	2022
Eating More	6%	9%
Eating Same	50%	41%
Eating Same, but I've been considering eating less red meat	18%	15%
Eating Less	26%	34%
	100%	100%

There may be a noticeable decline in meat consumption compared to 2016.

\*2016 Blend A&U study.

## Demographics (All 1251 respondents)

Which, if any, of the following best describes your background or heritage?

	2022
White/Caucasian	79%
Black/African American	9%
Hispanic/Hispano-American/Latino	4%
Asian	5%
Pacific Islander	0%
Native American	0%
Multiracial	2%
Other	0%

Are you Hispanic?

	2022
Yes	8%
No	92%

Do you have any children under the age of 18 living in your household?

	2022
Children Under 6 years of age	5%
Children 6 years of age or older	17%
Children Both under and over 6 years of age	6%
No children under 18 living at home	72%

What is your gender?

	2022
Male	38%
Female	61%
Other / No answer	

What is the highest level of education you have achieved?

	2022
Did not complete high school	2%
Completed high school or equivalent	24%
Completed some college	20%
Completed 2 year college degree	12%
Completed 4 year college degree	26%
Completed some graduate degree	2%
Completed graduate degree	14%

Including yourself, how many people live in your household?

	2022
One	22%
Two	41%
Three	18%
Four or more	19%

What is your age group?

	2022
18-24	5%
25-30	6%
31-35	6%
36-40	9%
41-45	8%
46-50	11%
51-55	11%
56-60	11%
61-65	15%
66 or more	18%

Of the following ranges, which one best describes your gross annual household income?

	2022
Less than \$15,000	8%
\$15,000-\$24,999	9%
\$25,000-\$49,999	22%
\$50,000-\$74,999	22%
\$75,000-\$99,999	14%
\$100,000-\$149,999	14%
\$150,000-\$199,999	6%
\$200,000 or more	4%
No answer/refused	2%

What share of your household's food shopping do you personally perform?

	2022
0-25%	0%
26-50%	14%
51-75%	17%
76-100%	70%