

# TAPPING EMERGING DIETARY TRENDS TO INCREASE CONSUMPTION OF BROCCOLI

MARCH 2017

VG16027 Vegetable Trend Forecasting and Analysis



Growers posed the question: *how can other vegetables do what kale did?*  
The following presentation provides a top line review of research conducted into emerging food trends, and outlines a theoretical strategy for broccoli growers to capitalize on these trends through marketing and PR.

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- 3. Mapping a food trend
- 7. Identifying emerging food trends
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**Please Note:** Workshop advises that the following strategic plan recommendations include marketing activities. We acknowledge that the vegetable industry does not have a marketing levy at this time.



## HOW CAN WE IDENTIFY A FOOD TREND?

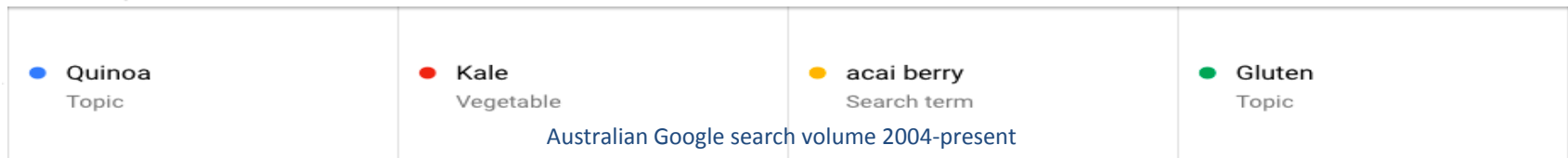
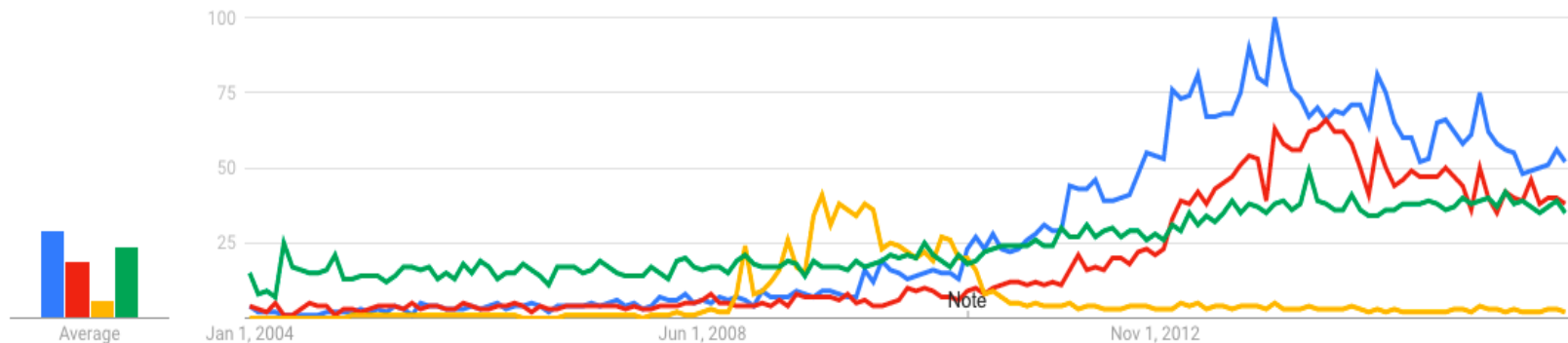
We mapped current food trends against local and global google search volume to inform our strategy and determine our criteria for success.



# WHAT ARE WE LOOKING FOR?

## Trends vs fads vs megatrends

Interest over time ?



Search volume for **GLUTEN** represents a macro trend, rising steadily over a long period and influencing the search volume of related foods.

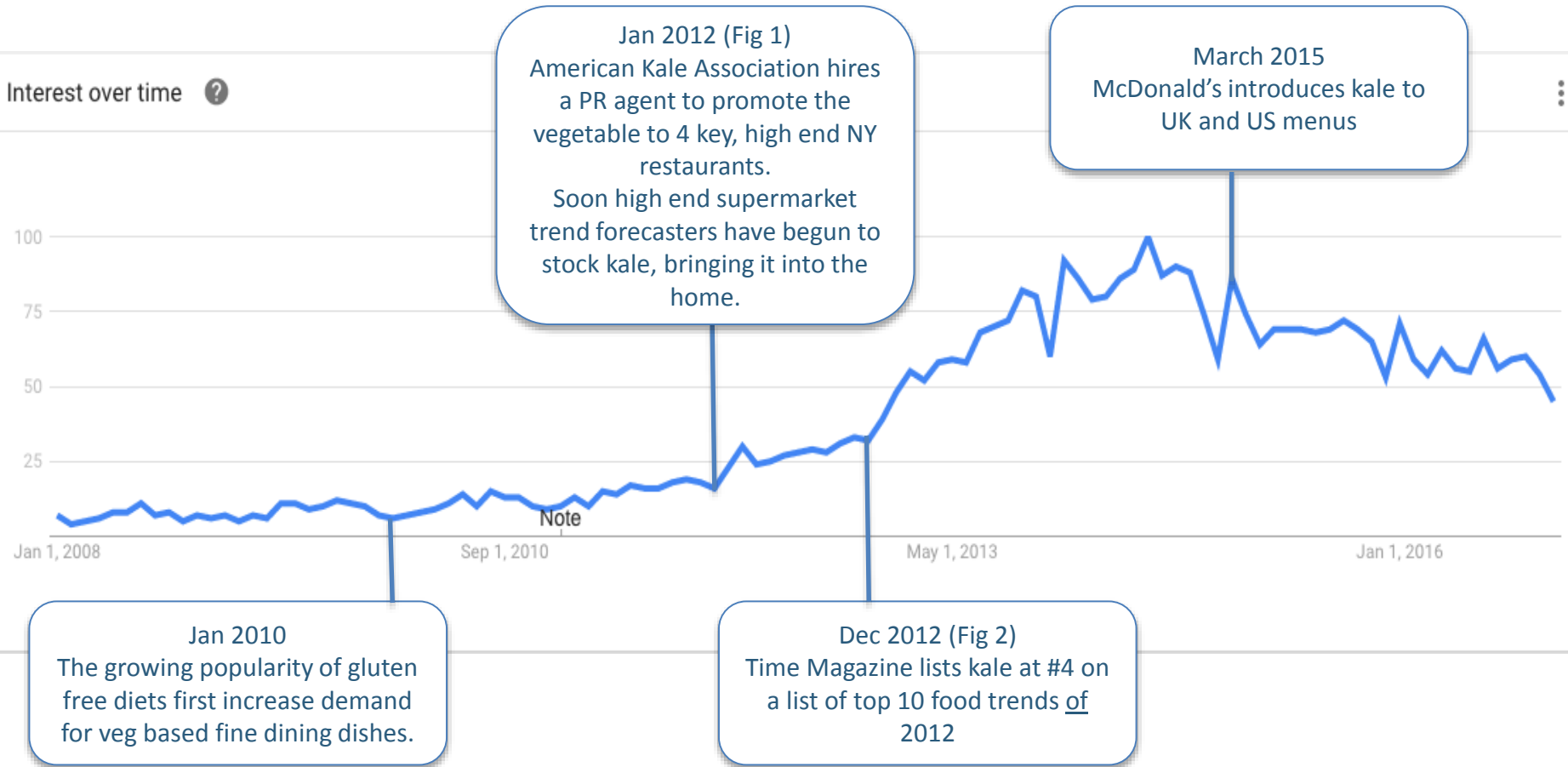
Search volume for **KALE** and **QUINOA** represents a genuine trend, rising steadily from a low base and eventually returning to a higher base than before the trend. This is the search interest we are aiming to replicate.

Search volume for **ACAI BERRY** represents a fad, rising quickly from a low base but returning to that low base just as quickly.



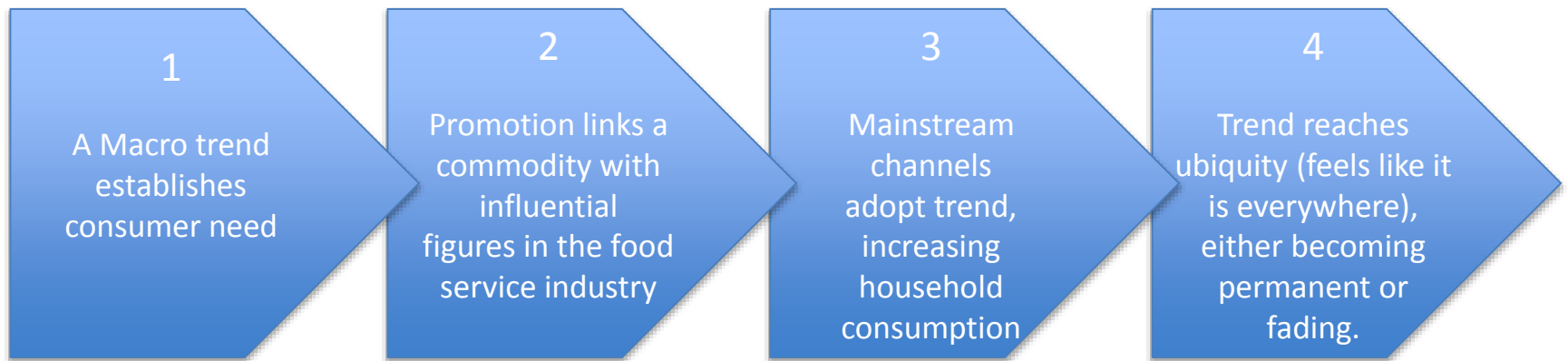
# MAPPING THE PROGRESSION OF A TREND

## Key stages of the kale trend



Australian Google search volume 2004-present

# THE FOUR STAGES OF A CONSUMER FOOD TREND



## WHAT ARE THE EMERGING DIETARY TRENDS?

The two most significant macro trends set to influence our dietary habits in 2017 are a national increase in rates of vegetarianism and the increasing sophistication of health goals pursued through diet.



# DIETS THAT PROMOTE BALANCE

As dietary regimes and philosophies continue to grow in popularity, the goals of those regimes will continue to become increasingly sophisticated and specialised (Fig 3).

## Current examples:

Ayurvedic eating (ancient Indian mysticism that focuses on balanced ingredients to promote spiritual and physical health).

Dieting to influence the gut's microbial community (microbiota) and its component genes (microbiome).





# SEEKING NEW SOURCES OF PROTEIN

The ABS estimates the rate of Australians following vegan or vegetarian diets is set to reach 15% by 2020. Many former omnivores will require meat substitutes and more varied sources of protein (Fig 4).

Natural protein (as well as fibre) is expected to be a growing trend in nutraceuticals in 2017.

Beyond dietary protein, new vegetarians will seek out foods with a *meaty mouthfeel* as ingredients to build a meal around.



# DIETING FOR MENTAL HEALTH

An unabated search for improved health and wellbeing will spread to mental health in 2017.

Differences in prevalence of mood disorders between cultures is increasingly attributed to differences in diet (Fig 5).

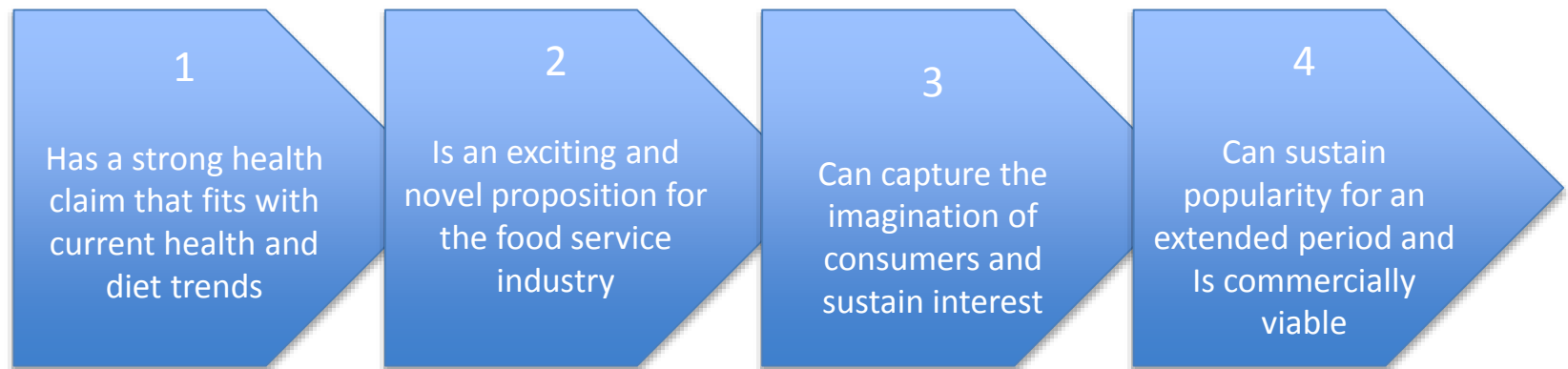
**New example:** Full calming diet regimes, balancing moods with food, eating to improve acuity, gut & brain connection.



## WHY BROCCOLI?

We reviewed our research findings to determine what were the 4 key boxes to tick when choosing a vegetable to support. Broccoli satisfied all criteria and plays a role in all 3 macro dietary trends.

## 4 KEY FEATURES TO LOOK FOR IN A TRENDING COMMODITY

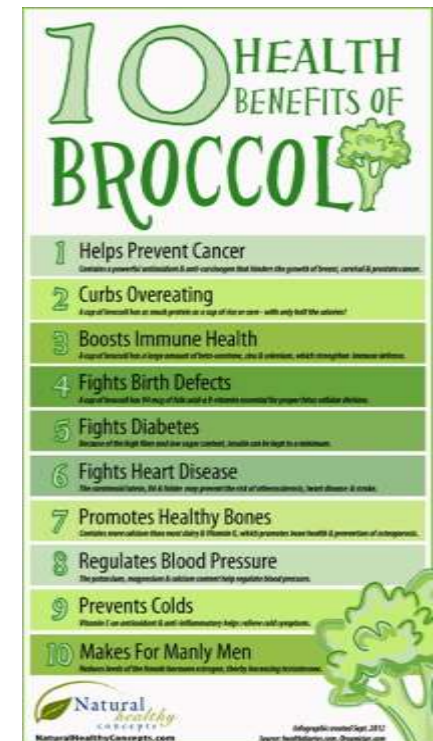


# HEALTH CREDENTIALS ARE ESSENTIAL

Broccoli is the most versatile food for mental health, containing vitamins and minerals that fight depression, anxiety, stress, insomnia and increase mental acuity.

The meaty mouthfeel and protein content of broccoli also makes it an excellent meat substitute for diners on meat free diets.

Cruciferous vegetables including broccoli stimulate the growth of healthy gut bacteria and promote a healthy microbiome.



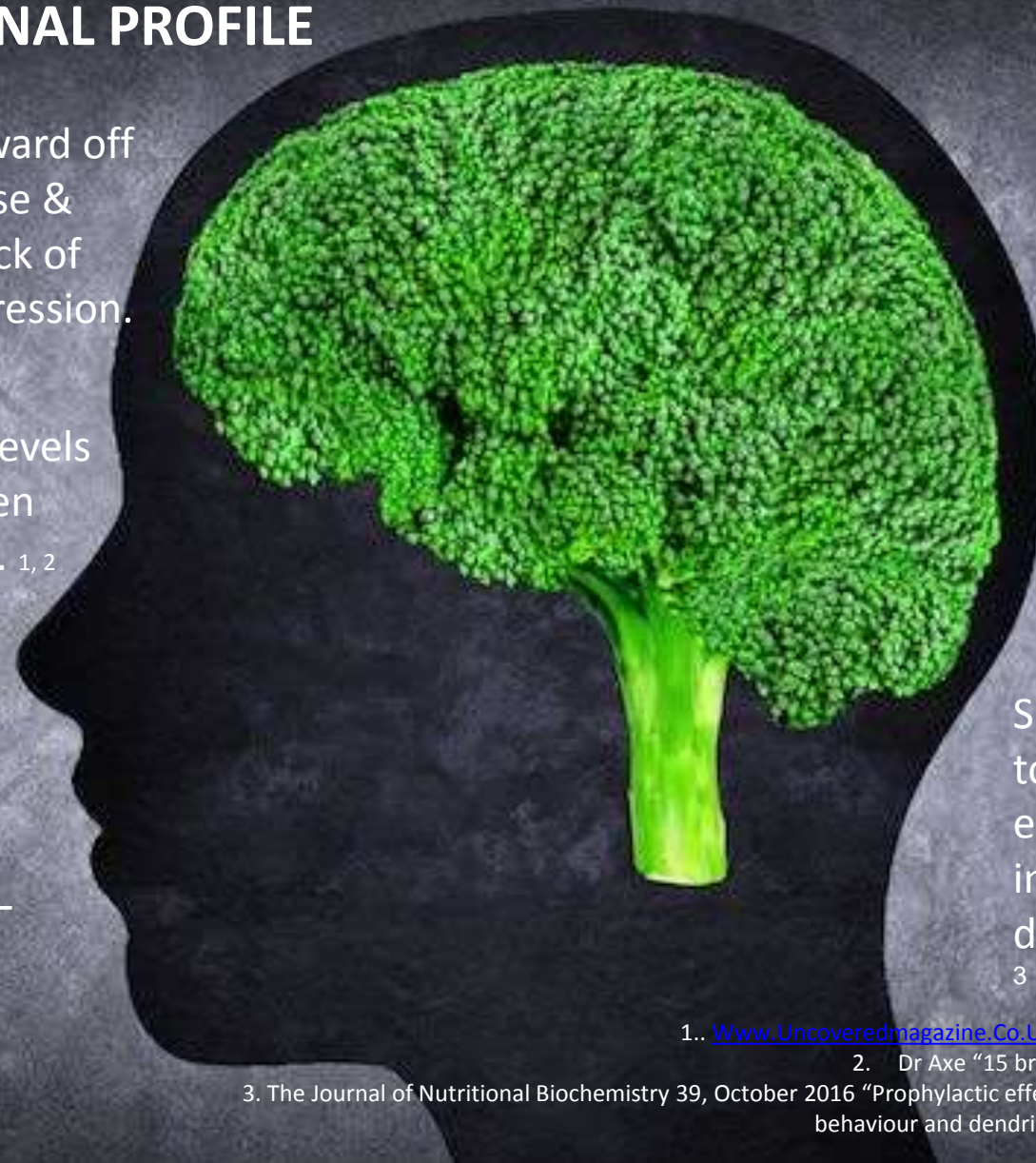


# NUTRITIONAL PROFILE

Folic Acid – help ward off Alzheimer’s disease & studies suggest lack of could lead to depression.

1, 2

Vitamin K – high levels helps to strengthen cognitive abilities.



Choline – high levels found to improve memory.

1, 2

Vitamin B1 & B5 – improve concentration & memory.

Vitamin C (one cup is 150% RDA<sup>2</sup>), Vitamin B3/B6, Magnesium, Zinc – all nutrients which are lacking in sufferers of depression, anxiety and lead to lack of focus/motivation and insomnia.

Sulforaphane – found to have prophylactic effects on inflammation-related depressive symptoms.

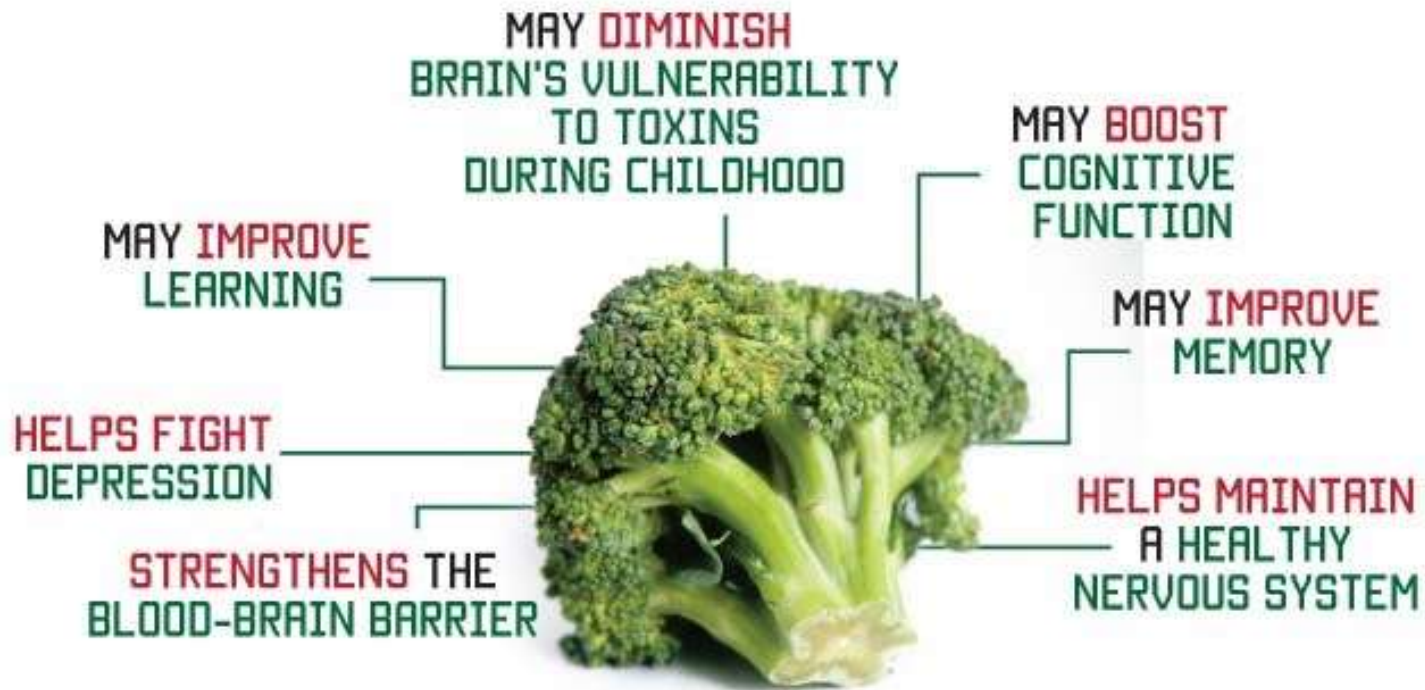
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1.. [www.Uncoveredmagazine.Co.Uk](http://www.Uncoveredmagazine.Co.Uk), “Mind food eating for good health.”

2. Dr Axe “15 brain foods to boost focus and memory.”

3. The Journal of Nutritional Biochemistry 39, October 2016 “Prophylactic effects of sulforaphane on depression-like behaviour and dendritic changes in mice after inflammation.”

# KEY BENEFITS



## Brain Health Benefits of BROCCOLI

 DEVELOPINGHUMANBRAIN.ORG

### Sources:

<http://articles.mercola.com/sites/articles/archive/2013/10/31/9-foods-brain-health.aspx>  
<http://30dayfitnesschallenges.com/10-benefits-of-eating-broccoli/>  
<http://www.everydayhealth.com/diet-nutrition/build-a-better-body-with-broccoli.aspx>  
<http://newsletter.dole.com/2015/broccoli-brain-barrier/>



# CHARISMA

Health credentials are essential, but creating a consumer trend will require a vegetable to capture the imagination of diners and early adopters.

Sales data presented on the following slide shows an already observable uptick in both the consumption of broccoli but also the variety of meals and occasions broccoli is being consumed. This indicates a growing interest in broccoli and a receptiveness to promotion.

It would be beneficial therefore to present broccoli in a new light and work with chefs and/or other influential characters on bringing this to the table in a different way that would harness this interest.



# CURRENT STATUS: BROCCOLI (NOV 2016)

## Broccoli Grower Action Plan.

8

**Wave 42 Fast Facts – Broccoli**

- There are high levels of satisfaction and endorsement for broccoli.
- On average broccoli is purchased 5 times per month and consumed 10 occasions per month. Mainstream retailers are the main purchase locations.
- Consumers typically purchase 800g of broccoli per occasion, a slight increase from the previous wave. Broccoli is perceived to be relatively good value for money. Individual heads of broccoli are the preferred format.
- National pricing analysis revealed an average of \$3.72 per kg, which is noticeably lower than prices recorded in July 2016 (\$5.37 per kg).
- Overall awareness of broccoli types remains low. Nearly two thirds of consumers are unable to recall any variety.
- The key motivations for purchasing broccoli are health and ease of preparation. The main barriers to purchase are not wanting to waste any and already consuming enough.
- Broccoli is expected to remain fresh for just over a week. Expectations of freshness are increasingly being met all of the time.

**\$3.72** was the recalled last spend on broccoli in November 2016.

**1. Insight:**  
Both purchase and consumption frequency have increased over the last three waves.

**Short Term Recommendation:**  
To continue strong interest in broccoli past peak season, look to encourage climate appropriate recipes and cooking ideas. There is opportunity to develop new products including juicing packs with carrots or shredded broccoli slaw products.

**2. Insight:**  
There was a significant increase in broccoli being consumed as a quick meal.

**Long Term Recommendation:**  
Investigate the potential to package broccoli florets. This format will reduce preparation time for consumers and provide growers with a value-add proposition. As per the Industry Insight, look to packaging formats that increase shelf life i.e. Ethylene-Absorbing Packaging.

Horticulture  
Innovation  
Australia

colmar brunton.



# HARNESSING INTEREST VIA A LINK WITH INFLEUNTIAL CHEFS

Broccoli is already widely used as a meat substitute in **Indian** cooking, which is set to experience an increase in popularity due to the trend towards Ayurvedic eating.

Broccoli is also commonly used as a meat and cream substitute in **Italian** cooking.

A theoretical campaign should aim to form a partnership with high profile chefs that specialize in these two cuisines. Ideally these chefs would have a large social media (Facebook/Instagram predominantly) following.



**Guy Grossi**, an Australian Chef & Media Personality, owning several restaurants in Melbourne.

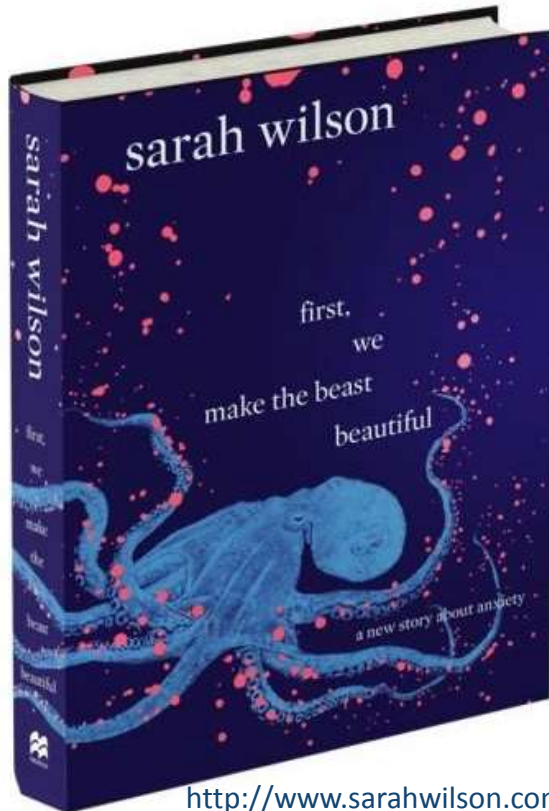


**Kumar Mahadeven** is an Indian chef, restaurateur and media personality, based in Australia. He is often referred in Sydney's dining circles as the "Guru of Indian cuisine"

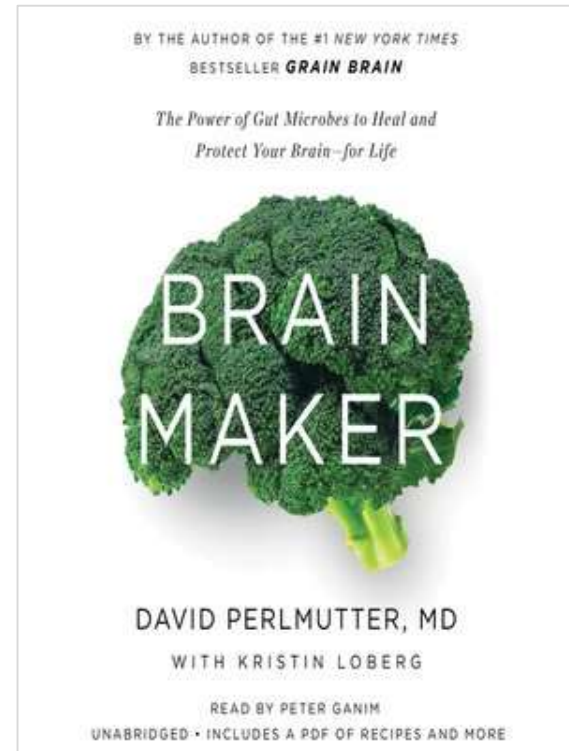


# BRAIN HEALTH - INFLUENCERS

A recent increase in mainstream publishing of gut health and mental health books provides an interesting mix of diet and mindfulness for mental health, easily accessible. Diverse influential authors are gaining a lot of public attention and interest.



<http://www.sarahwilson.com/2013/12/five-surprising-broccoli-recipes/>



# INFLEUNTIAL THOUGHT LEADERS BEYOND CHEFS

The credentials of broccoli as a food for the maintenance of mental health, and moderation of mood, are so strong that a marketing campaign could potentially focus on forming a partnership with a mental health advocate.

Anxiety awareness advocate Sarah Wilson represents a potential fit with broccoli. She also has a large social media following and high media profile, alongside her credentials in the food space with numerous cookbooks.

The difference between using someone like Sarah, as opposed to a chef, is that this would require a larger financial investment – unlike chefs they are not seeking to use food in new/interesting ways as such, however, could get the message out to the public in a fun/informative way quicker and have a direct influence on retailers – especially if they have brands themselves (e.g. Sarah's 'I Quit Sugar' brand in Woolworths/Coles).



Sarah Wilson

# POTENTIAL LONGEVITY

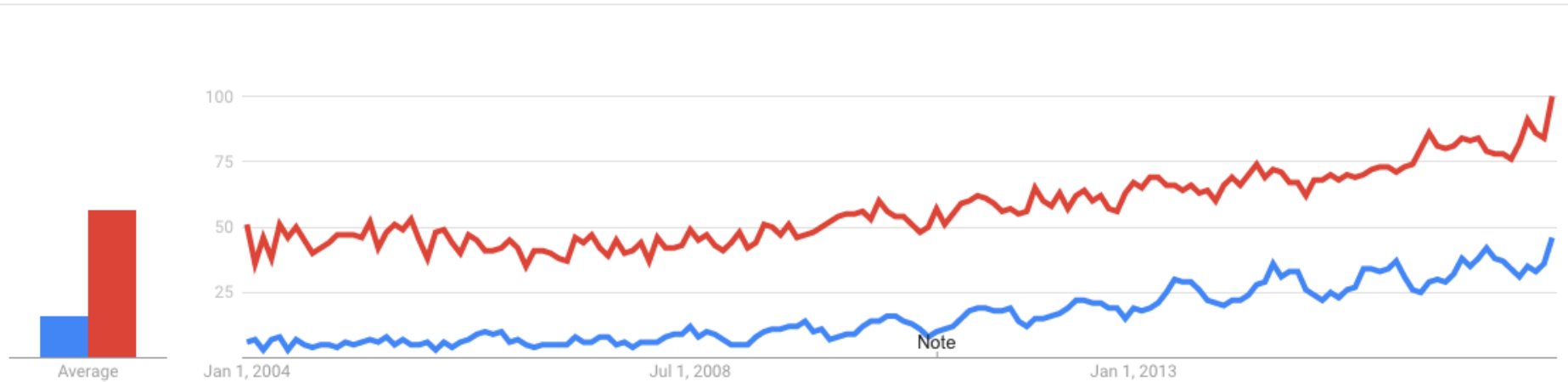
We know Australian producers currently grow more broccoli than is consumed, which confirms that an increase to the consumption of broccoli in Australia can be both profitable and sustainable.

The following slide charts local search volume for broccoli. It indicates a steady increase in seasonal consumer interest. We can therefore be confident that Australians will be responsive to broccoli promotion, and that success can be sustainable.



# AUSTRALIAN BROCCOLI SEARCH VOLUME 2004-PRESENT SHOWS INCREASES IN LINE WITH INTEREST IN VEGETARIAN DIETS

Interest over time ?



● Broccoli  
Search term

● vegetarian  
Search term

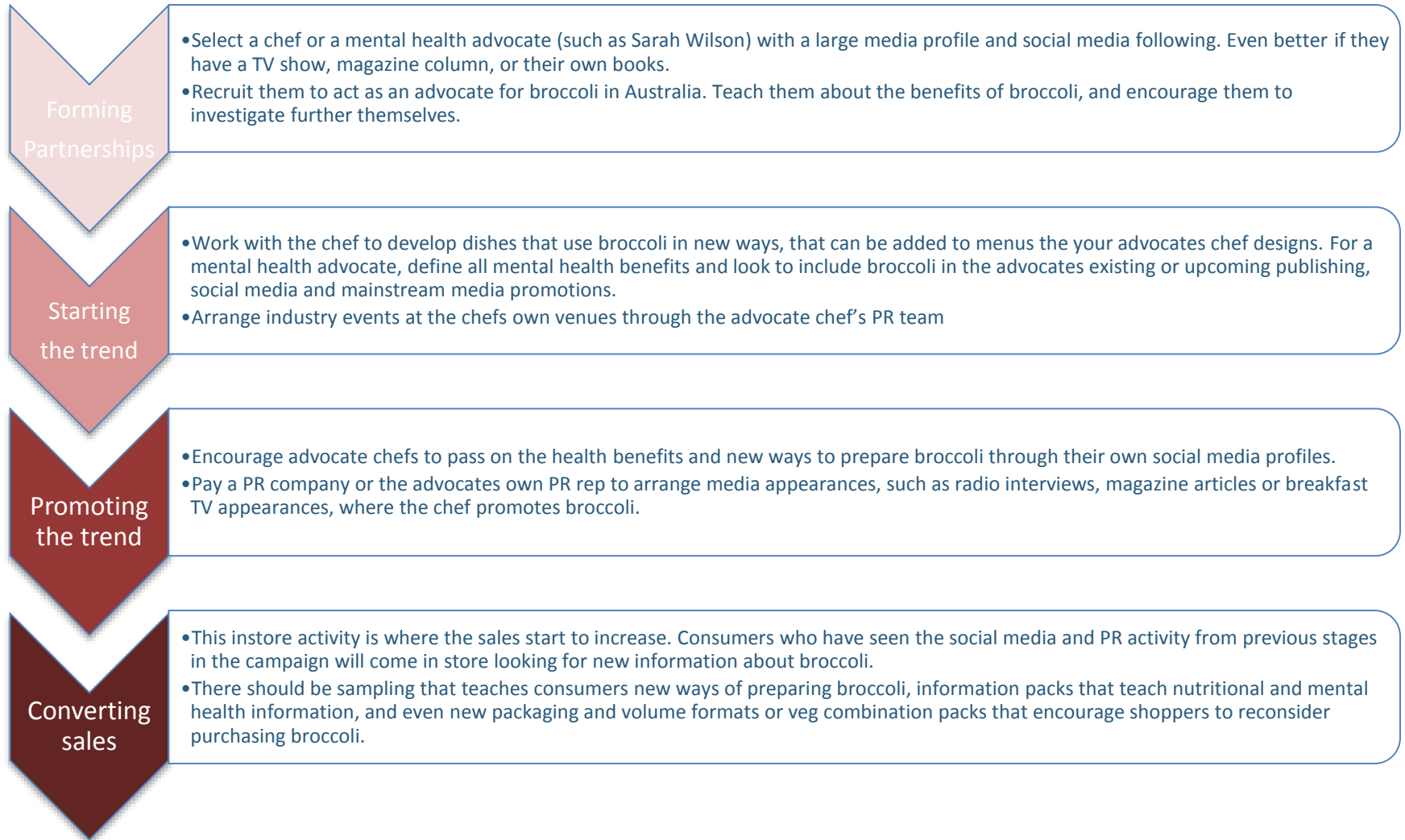
## INCREASING AUSTRALIAN CONSUMPTION OF BROCCOLI

Campaigns for kale and avocado show that creating a food trend involves partnering with thought leaders in hospitality (chefs) in spreading the message of a commodity's health claims through TV, print and social media PR. This should coincide with in-store sampling and promotion.





# FLOW CHART OF POTENTIAL CAMPAIGN ACTIVITY



# ENGAGING CHEFS AND MENTAL HEALTH ADVOCATES

Celebrity chefs and hospitality venues are the most influential channel on our aspiration household dietary habits.

Broccoli has the potential to play a large role in contemporary Indian and Italian cuisine over the coming years but also play a large role in anxiety reduction diets.

Sarah Wilson has a high profile in anxiety awareness and could promote the health benefits of broccoli in a purely mental health context.

These people though are big brands themselves and we would suggest working alongside a professional PR company/representative to negotiate and communicate on your/your group's behalf.



Guy Grossi



Kumar Mahadeven

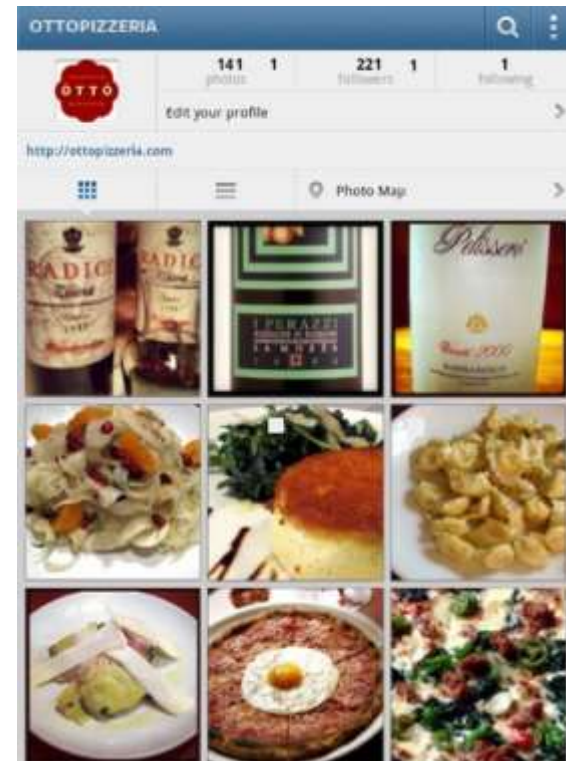


Sarah Wilson

# ENSURE BROCCOLI DISHES ARE ADDED TO MENUS

Adding broccoli dishes to menus influences more than just diners. Cook books, other restaurants and café menus, and importantly, food retailers, all reflect and amplify the popularity of trending commodities on restaurant menus.

Greater presence on restaurant menus beyond those of the participating chefs, in new formats and with new recipes would be the first indication that broccoli is beginning to trend.



# HAVE CHEFS PROMOTE HEALTH CLAIMS THROUGH PR

PR and promotion from our ambassador chefs will be the primary driver of consumer awareness of the health claims and trend towards broccoli .. i.e. really get them thinking and believing that it is the undiscovered health hero.

Previous stages of influence (i.e. just simply getting back on the menu at certain high profile chef's restaurants) will capture the imagination of early adopters and other members in the hospitality industry, while our advocate chefs actually spreading the health claims through the media will take the trend to the main stream.



# NEW PACKAGING AND IN STORE PROMOTION TO BOOST CONSUMPTION

Finally, the primary driver of actual sales will be in store activity.

Sampling and in store promotion, including recipe cards, new packaging (potential companion packaging, e.g. “mental health/acuity/smart pack”) and portions will be what convinces interested consumers to reappraise broccoli and purchase more broccoli, in order to prepare it in the new ways they have seen in restaurants, PR, and social media.





# MARKETING SPEND

Marketing and promotional budgets are very difficult to set until the full extent of requirements are known. Luckily, primary produce is a desirable product to partner with from an advocates perspective to exemplify health and goodness.

However, here are some budgetary estimates to consider:

- Public Relations investment required for engaging an advocate and managing the relationship with events/media consultations and send-outs: \$50-\$500k dependent on personal “brand” and social media audience of the proposed advocate.
- In store sampling can be subsidised by an individual grower or as part of a conglomerate. However a national campaign (Woolworths, Coles & independents) can cost in excess of \$100k.



# APPENDIX AND FURTHER READING

**Fig1** <http://www.self.com/story/how-kale-became-cool>

**Fig 2** <http://ideas.time.com/2012/12/04/top-10-food-trends/slide/king-kale/>

**Fig 3** <https://www.jwtintelligence.com/2016/12/future-100-trends-change-2017/>

**Fig 4** <http://www.bandt.com.au/marketing/study-lamb-ads-arent-working-aussies-going-vego-health>

**Fig 5** <https://www.jwtintelligence.com/2016/12/future-100-trends-change-2017/>



THANK YOU