



**VEGPOWER**

# Seasonal Vegetables

**Special Report:** July 2021

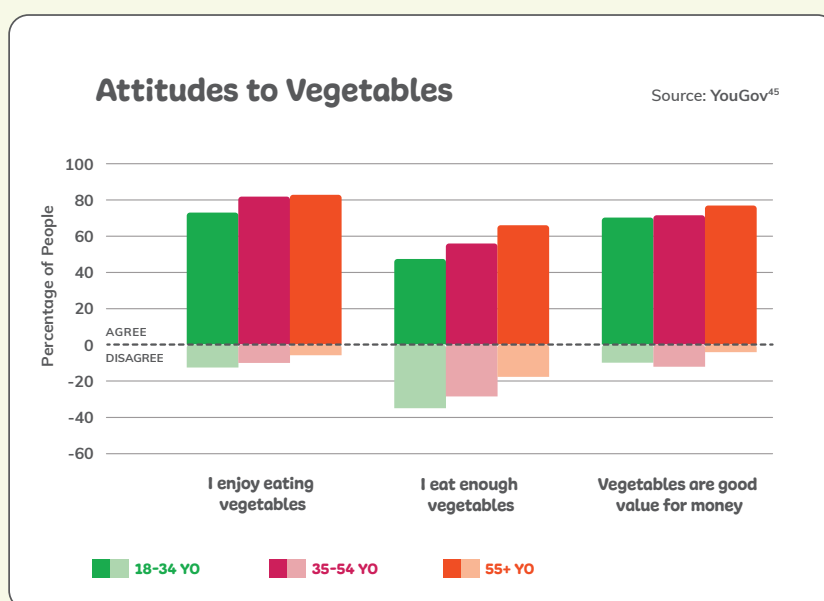
UK consumer awareness,  
attitudes and influence of  
vegetable seasonality

**SPECIAL REPORT:**

# Seasonal Vegetables

How aware are UK consumers about vegetable seasonality? And how much does it influence their purchasing? We wanted to find out, so we commissioned YouGov to survey 2,000 people and Pearl Metrics to analyse the IRI retail sales data.

We asked a full range of ages and demographics but were particularly keen to understand the 18–34 year olds, as they are more likely to be starting families and so influencing the next and current generation of kids.



## Attitudes to vegetables

Firstly, we wanted to better understand their general attitude to vegetables.

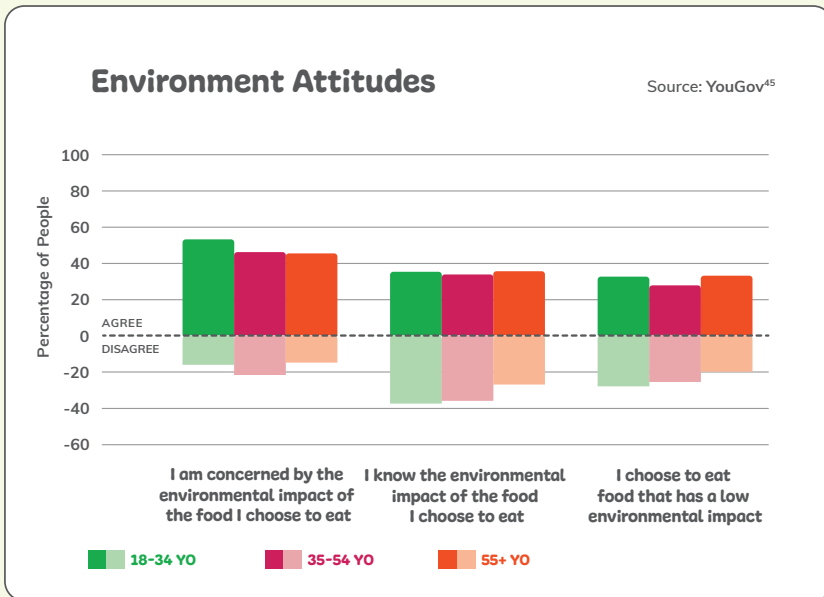
What can we conclude from these results?

**1** Most people (79%) enjoy eating vegetables, with 43% strongly agreeing and only 9% saying otherwise. This compares to 26% of kids who like eating vegetables a lot, 39% a little and 24% who dislike them<sup>2</sup>.

**2** 58% of people think they eat enough vegetables, in truth only 23% do<sup>3</sup>.

**3** 72% of people think veg are good value, with little difference between ABC1s (73%) and C2DE (70%) with only 10% of CD2Es disagreeing.

As we shall see throughout there is generally a greater appetite for and knowledge of vegetables as people age. Is this simply maturing tastes and knowledge or an underlying decline from one generation to the next? Likely a little of both, but hard to ascertain without similar historical data.



## What about the environment?

86% of adults in England reported that protection of the environment is important to them<sup>46</sup>, no doubt a similar number feel the same way in Scotland, Wales and Northern Ireland. In fact the UNDP Climate Change poll of 1.2m people globally found the highest proportion of people saying there is a climate emergency was in the UK and Italy, both at 81%.

How much does this climate concern surface in the grocery shopping aisle?

This data reveals a very interesting picture. There is a significant gap between the 80%+ who care passionately about climate change, but only 49% across all ages who care about the environmental impact of their food. As a society we are failing to fully convey the message that the food system is responsible for 25-30% of global emissions<sup>4</sup>, and an area where each of us as individuals can make a significant difference by the choices we make.

There is then a significant leap between the 50% who care and 33% who know and 25% who act.

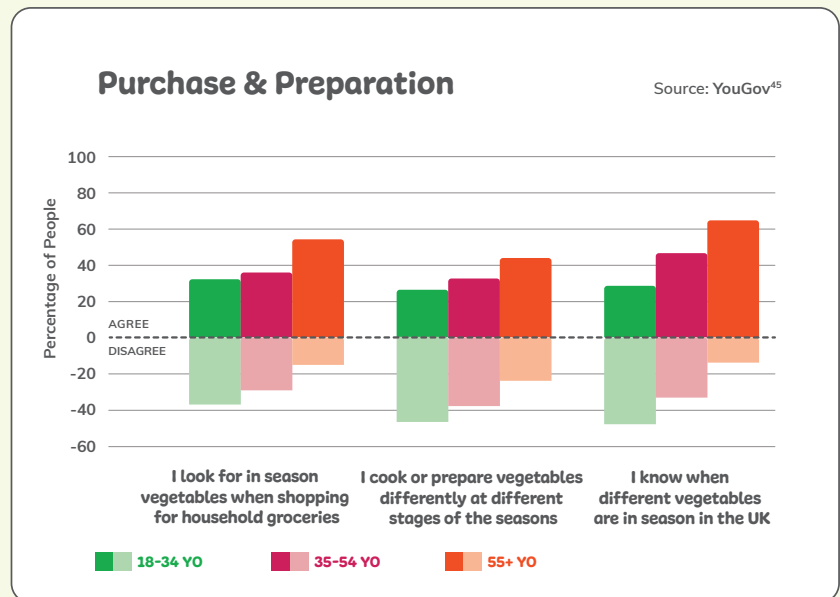
This is even true with the Greta generation of 18–24 year olds; only 50% are concerned about the environmental impact of their food and only 28% choose to eat food that has a low environmental impact.

All in all, this points to a significant education deficit. To grow vegetable consumption by the climate conscious we have much to do to educate them about the significant role of food within climate change, and position vegetables as the first choice of the climate conscious consumer.

## Does seasonality influence purchase or preparation?

In summary... not much. What's really notable in this data is how much this progresses with age. Older people look for in season vegetables and prepare them to suit these seasons. Is this just a product of experience or a shift between generations? Either way there is clearly a knowledge gap we need to fill.

Do people really know what is in season? 48% think they do, rising to 64% in the over 55s, let's find out if they do.



## The seasonal veg quiz

It's harder than you might think to design such a test. Seasons vary depending on conditions. Which veg should we choose? How many choices should we give people? How close should we make those choices? We are indebted to Dr Emma Haycraft from Loughborough University for her guidance kindly provided to design this survey.

So, what does it tell us? With 7 options for each vegetable a roll of a seven-sided dice would score 14.3% correctly. Our 2,000 panellists scored only a little higher than guess work at 16.4%. However, results vary massively. Clearly people have no idea how long the UK domestical supply of tomatoes and peppers can be in season. Without those the average score would be 27.5% correct answers, a little more respectable, but still leaves us to conclude that few people really know what's in season.

Do the older folk deliver on their claim to know so much better than the youngsters? They do, but not as much as they think they do.

## Carrots



Seasons	18-34	35-54	55+	All
April to November	13%	13%	14%	13%
June to December	7%	9%	14%	10%
July to September	17%	15%	15%	16%
October to February	14%	15%	11%	13%
Nearly all year	24%	27%	33%	28%
None of these	1%	0%	0%	0%
Don't know	25%	20%	12%	19%

Correct answer: Nearly all year

## Peppers



Seasons	18-34	35-54	55+	All
February to October	4%	1%	1%	2%
April to November	8%	6%	5%	6%
May to September	22%	22%	18%	21%
July to September	23%	28%	32%	28%
Nearly all year	6%	10%	9%	8%
None of these	3%	6%	7%	6%
Don't know	33%	27%	29%	29%

Correct answer: February to October

## Courgettes



Seasons	18-34	35-54	55+	All
February to October	6%	3%	1%	3%
April to November	13%	8%	7%	9%
June to September	24%	41%	48%	39%
July to December	9%	10%	11%	10%
Nearly all year	7%	7%	6%	6%
None of these	1%	1%	1%	1%
Don't know	41%	30%	27%	32%

Correct answer: June to September

## Turnips



Seasons	18-34	35-54	55+	All
February to October	6%	6%	4%	5%
April to November	9%	10%	11%	10%
October to February	21%	31%	36%	30%
December to April	13%	14%	17%	15%
Nearly all year	13%	11%	14%	12%
None of these	0%	1%	0%	0%
Don't know	37%	27%	18%	26%

Correct answer: October to February

## Tomatoes



Seasons	18-34	35-54	55+	All
April to December	4%	4%	2%	3%
May to September	30%	28%	30%	29%
June to November	10%	11%	17%	13%
July to September	21%	26%	30%	26%
Nearly all year	8%	14%	12%	11%
None of these	1%	1%	0%	1%
Don't know	27%	16%	10%	17%

Correct answer: April to December

## Broccoli



Seasons	18-34	35-54	55+	All
April to November	10%	9%	8%	9%
June to November	10%	13%	14%	13%
July to September	12%	16%	19%	16%
October to February	9%	13%	23%	16%
Nearly all year	16%	15%	12%	14%
None of these	2%	0%	0%	1%
Don't know	42%	34%	23%	32%

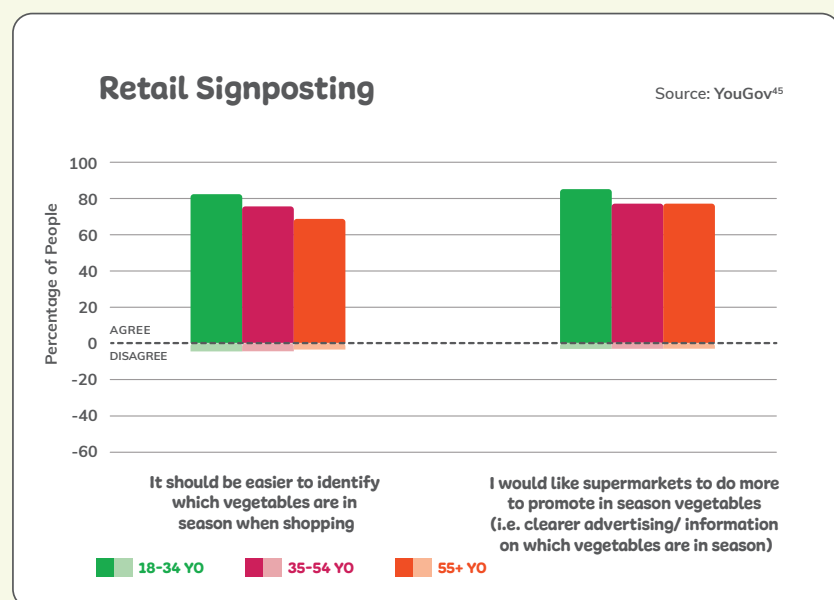
Correct answer: June to November

## Where do we go from here?

Here's the exciting news for the sector – there is genuine interest. 75% of people believe it should be easier to identify which vegetables are in season when shopping with 80% calling for the supermarkets to do more to promote seasonal vegetables.

This conclusion is also supported by the IGD Appetite for Change report<sup>5</sup> which considered how to apply behavioural science shortcuts to encourage fruit and vegetable consumption in the wake of COVID-19. Of the eleven interventions they tested the most popular (84%) was the display of local and seasonal fruit and veg in-store. Furthermore 71% called for retailers, brands and the out-of-home sector to get behind a seasonal veg campaign.

We couldn't agree more.



## What does the sales data tell us?

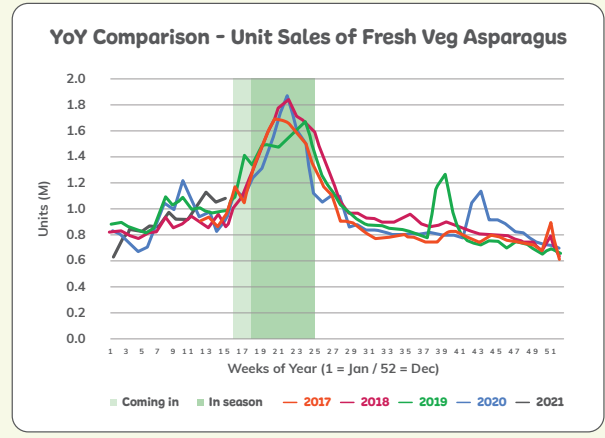
With retail sales data kindly donated by IRI Worldwide we looked at a few vegetables to ask how much seasonality influenced shopping patterns. The answer is varied, complex and worthy of more study than the scope of this report, but it does point towards some clear patterns.

Please note, we've not included any salad veg as the seasonal awareness is so low. Not surprisingly these peak in the summer, at the height of the season, but this is more a product of weather – for example the glorious summer of 2018 sees notably higher sales than the duller summer of 2019.



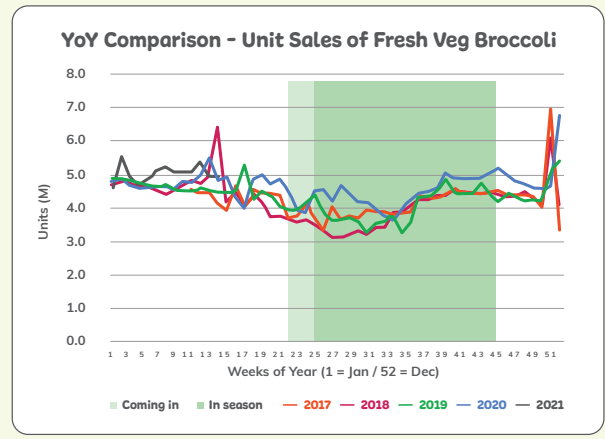
### Asparagus

Asparagus is easy and obvious. It has one of the shortest, best-known and most heavily promoted seasons. That sense of ‘a Beaujolais moment’ sees a significant spike in sales.



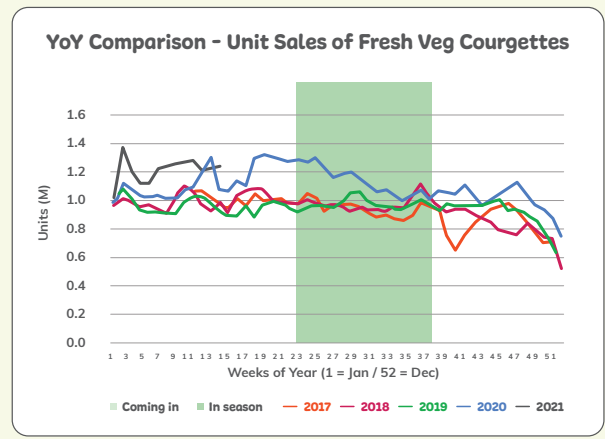
### Broccoli

Broccoli is also fairly simple but tells a different story. British broccoli runs from mid-June to mid-November, and the rest of the time it is Spanish. However, as we saw in the survey only 13% of people can name the UK domestic broccoli season. Sales are at their strongest in winter, with a strong Christmas spike, as most people see it as a winter veg, good with roasts and stews. Sales are at their lowest when British crop is at its best – July, August and early September. We need to show people that broccoli works well in salads, stir fries and other summer dishes.



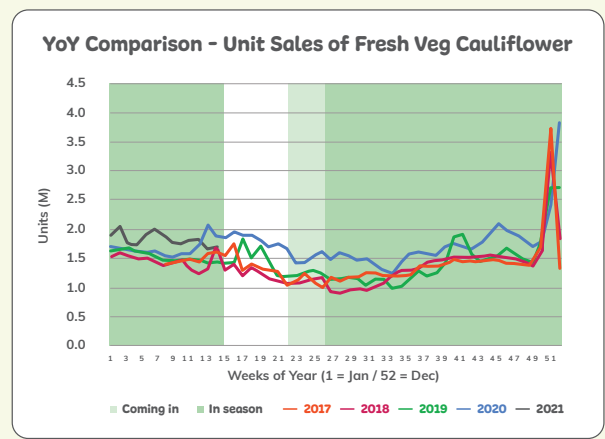
### Courgettes

Courgettes had the highest level of seasonal awareness in our survey with 39% answering correctly yet sales are almost totally indifferent to season. Courgettes steadily tick along all year and just doesn't feature on Christmas menus.



### Cauliflower

Cauliflower has a very different season to broccoli, much longer like cabbages. Yet they all have the same sales cycle as they are associated with winter meals and driven foremost by weather and tradition. Note how they both drop away in the summer of 2018, during the months of glorious heatwave, after a good spike from an early, cold, wet and windy Easter.



## Why seasonality is important for all vegetables

If you have large marketing budgets, you can shape cultural trends and consumer demand but when your marketing budgets are small, as they are with vegetables, then you need to find the powerful forces at work into which you can put your sail.

Strong winds are blowing in our favour, but just because vegetables offer so much to the problems of climate change and dietary health, we'd be wrong to assume that this opportunity is ours by right. There are very many, and far better funded, products vying to benefit from these trends.

The question we ask at Veg Power is how best to leverage the naturally great advantages of vegetables, given the modest marketing budgets, paucity of brands and limited influence at point of purchase and promotion compared to competing categories. We believe that "seasonality" is a simple easy-to-communicate idea that champions the positives of vegetables, all vegetables – freshness, nature, taste and vitality.

In particular we believe that if we can increase variety that will increase volume. We don't want people to substitute a portion of peas for a portion of beans but to add a portion of beans to go with those peas. It's vital that we establish a portion of veg with every meal and two with your main meal as routine habit.

Secondly, we believe that increased awareness of the climate and health benefits will increase people's perceived value of all vegetables.

All too often vegetables are the third thing on the plate and treated like a commodity by the shopper and, therefore, the whole supply chain.

Furthermore, with some simple tips our great-grandmothers would have known, we can teach people to better prepare their vegetables. For example: UK carrots are available all year, but spring carrots tend to be bland and may put people off (though they just need baking or extra seasoning) whereas carrots from July to September are full of flavour and perfect raw. Cabbages are also available all year but can be bitter in the spring, but soft and sweet in June – the perfect time to give it to kids. Early season broccoli is a different variety with a shorter shelf life – we don't want to put people off just before the season because their June broccoli turned so quickly and ended up in the bin. These are just a few examples of how "eating with the seasons" will increase people's pleasure of veg.

Thirdly, on a practical level, because there is significant support in government, and within supermarkets, press and influencers and, most importantly, with shoppers for more seasonal thinking. It's the whole sector's strongest ticket to significant category growth.

We believe that seasonality is the most effective method for lifting the profile of vegetables with that critical 18–34 year old demographic, as it best meets the defining spirit of their generation. We believe that all vegetables – domestic or imported, fresh, frozen or canned will benefit if vegetables become the first thing on their plate.

**Hazera**  
Seeds of Growth

*This research was made possible by part funding generously donated by Hazera Seeds Ltd.*



## References

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