Research conducted by:

On behalf of:

PRODUCE FOR BETTER HEALTH FOUNDATION:

PBH Foundation - Cluster Analysis

2012 Report: Dried Fruit

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Research Objectives

- The main objectives of this series of reports are:

  - *To understand those distinct segments within the consumer market for various "forms" of fruits and vegetables based on demographic, attitudinal and behavioral characteristics;*

  - *To identify potential marketing opportunities to target these distinct segments.*

Research Methodology

- The statistical technique of Cluster Analysis was used to classify the consumer market into distinct segments or clusters;
- Cluster Analysis is an exploratory data analysis tool for organizing observed data into meaningful segments based on combinations of independent variables, which maximizes the similarity of cases within each cluster while maximizing the dissimilarity between groups that are initially unknown;
- For the purposes of this analysis, the following type of Cluster Analysis was performed: *Hierarchical Cluster Analysis using Ward's Method, applying Squared Euclidean Distance;*
- The data set on which the analysis was run comprised of 1,300 consumer respondents;
- 81 independent variables were tested.

Summary of Key Findings and Observations

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- Dried fruit is quite popular.
  - *Only 16% of consumers never have dried fruit available in their homes*

- Seven (7) clusters define the dried fruit consumer market, and the size of these clusters varies from very small (5% of total) to relatively large (27%) *[ranked below in order of availability of dried fruit, from highest to lowest].*
  1. *“Moaners” (9% of total consumer market)*
  2. *“Ivy Leaguers” (7% of total consumer market)*
  3. *“Struggling Fruit Lovers”(5% of total consumer market)*
  4. *“Mother Gooses” (27% of total consumer market)*
  5. *“Mr. Middle Ageds” (13% of total consumer market)*
  6. *“Middle Americans” (27% of total consumer market)*
  7. *“MidWest Affluents” (12% of total consumer market)*

Summary of Key Findings and Observations

- There are several key demographic characteristics that help define the clusters. These can help in targeting consumers within each cluster:
  - *Income,*
  - *Education,*
  - *Employment status,*
  - *Region.*
- The consumption of dried fruit is not highly correlated to the consumption of fruit in general, suggesting that dried fruit has distinct benefits/drawbacks not directly related to fruit as a category. "Tastes good" and "good snack", for example, are most often cited as the key benefits of dried fruit and not "healthy".
- Cost does not appear to be a key barrier – the segment with the highest consumption of dried fruit (the *"Moaners"),* for example, are the most likely to believe that fruit (in general) is too expensive while the segment with the lowest consumption of dried fruit (the "*MidWest Affluents*") are the least price sensitive when it comes to fruit. This may indicate that some consumers equate dried fruit with higher value compared to other forms of fruit and again that taste rather than cost drives purchase.

Summary of Key Findings and Observations

- The key communication channels are supermarket displays, supermarket flyers/ads, TV ads and TV news segments as well as the Internet. These key channels do not differ significantly in their importance by clusters. As such, a more mass communications approach can be considered. Since most purchases for dried fruit are monthly, reach will be critical.

- In terms of reach, certain clusters may represent especially attractive targets:
  - *"Mother Gooses"* (largest segment, largest household size, most likely to have a child living at home, high propensity to view it as a good snack, waste less than average);
  - *"MidWest Affluents"* (highest income, regionally concentrated in the MidWest, least likely to shop based on healthiness, waste more than average).

Summary of Key Findings and Observations

- Increased visibility of the Fruits & Veggies – More Matters campaign may help stimulate demand.
  - *"Moaners" (the highest consumers of dried fruit) have both above average awareness and motivation;*
  - *"Ivy Leaguers" (the second highest consumers of dried fruit) have both above average awareness and motivation;*
  - *"Struggling Fruit Lovers" are less aware of the campaign but more likely to purchase due to exposure to the campaign.*

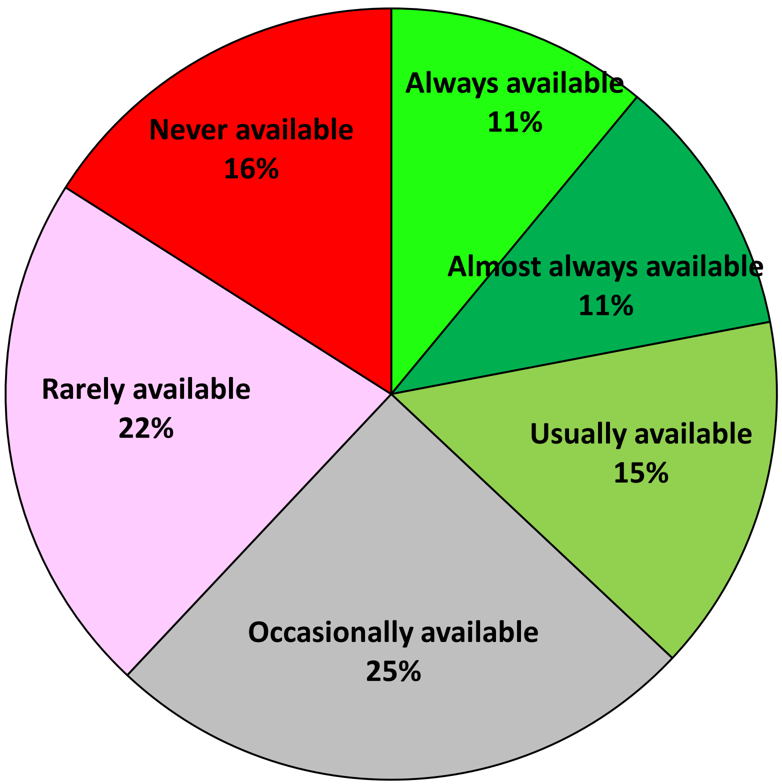
- Key media for the campaign appear to be supermarket displays, TV and magazines as these are the most likely to be self-reported by consumers as the primary ways by which they learned of the campaign.

Clustering Overview

The focus of the cluster analysis has been on the availability of dried fruit in the home

➢Only 16% of consumers never have dried fruit available in their homes.

Dried Fruit - % Share of Market based on Availability in the Home



n=1,300

Cluster Drivers

➢ Cluster analysis revealed that 28 of the 81 independent variables tested significantly and differentiated segments with the consumer market regarding dried fruit. These different clusters can be grouped based on those having a higher differentiating value (primary cluster drivers) and a lower differentiating value (secondary cluster drivers) based on their strength in predicting the cluster in question:

Primary Cluster Drivers

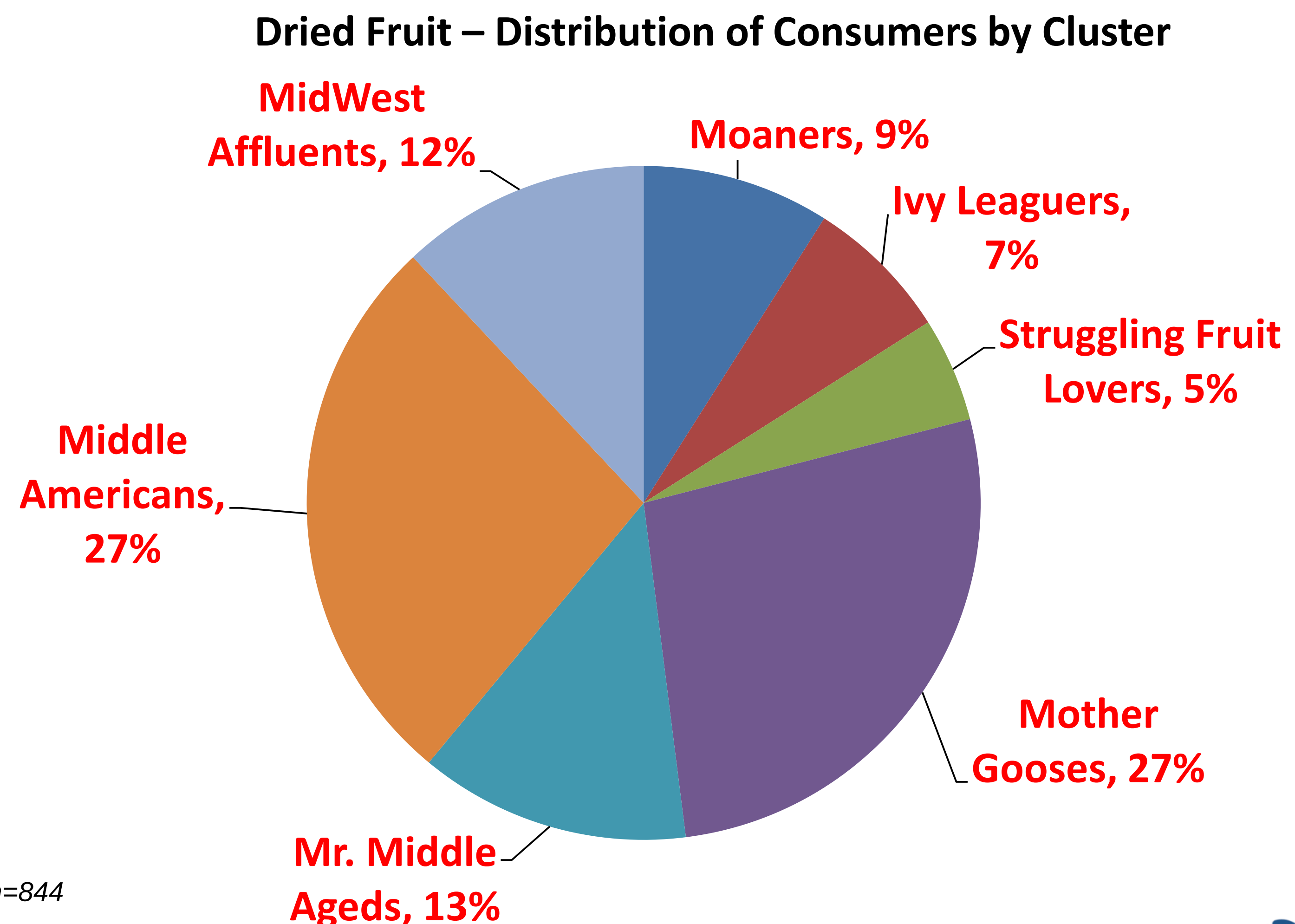
- *Income, Employment Status, Education;*
- *Daily consumption of all forms of fruit;*
- *Consumption occasions;*
- *Barriers to including fruits and vegetables in meals and snacks.*

Secondary Cluster Drivers

- *Age, Region, Household size, Children living at home, Ethnicity;*
- *Health benefits.*

Cluster analysis produced 7 clusters for dried fruit

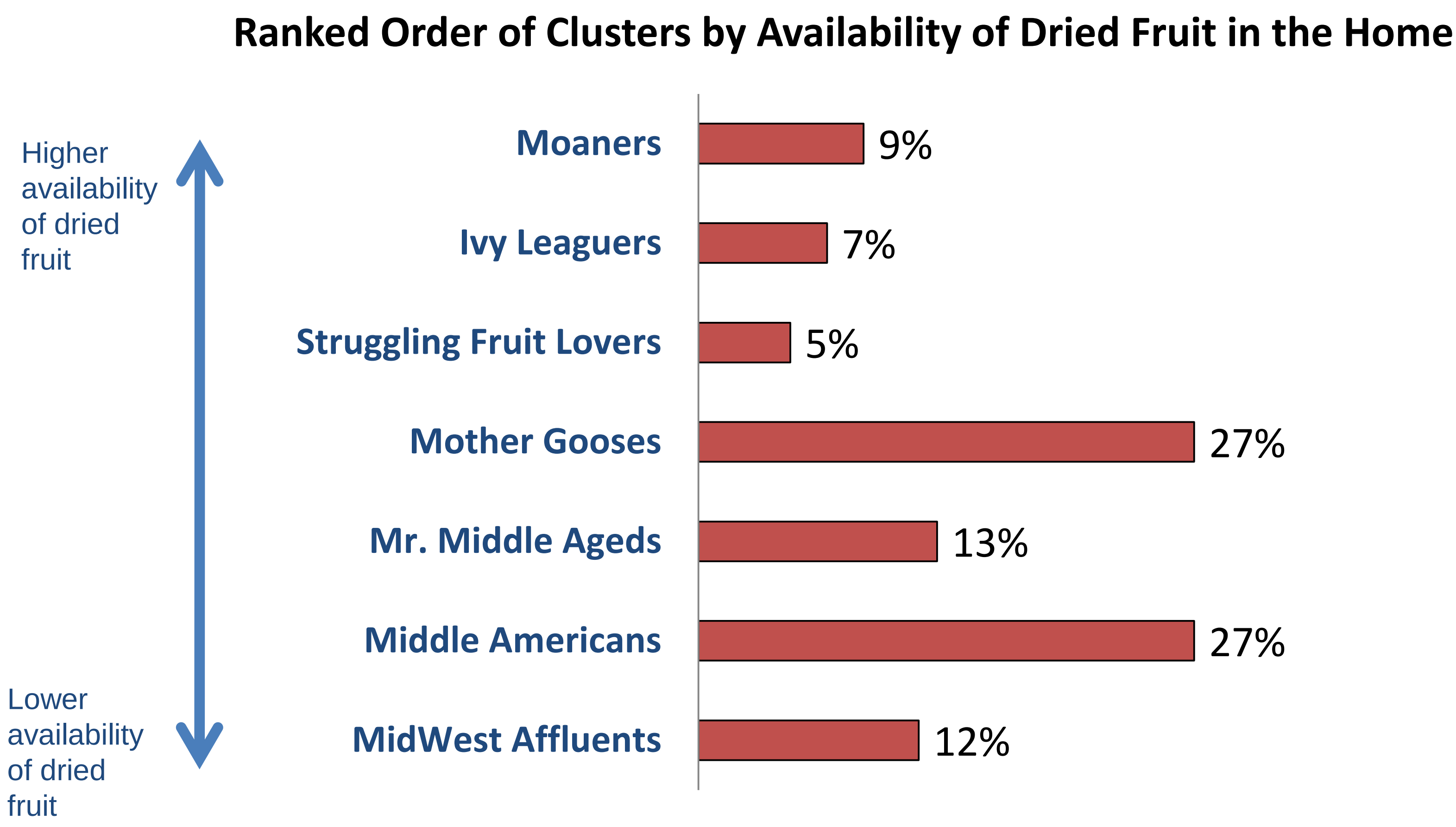
➢The size of the clusters range from small (5%) to relatively large (27%).



n=844

The clusters can be ordered in terms of availability of dried fruit in the home

➢ Each cluster will be profiled in the next section of this report in the order below.



Cluster Profile:
“Moaners”

Profile Summary: *"Moaners"*

- The ***"Moaners"*** cluster represents consumers who are most likely to have dried fruit in their homes;
- They represent 9% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Be non-White, particularly Asian/Pacific Islander or Black/African-American;***
  - ***Be slightly younger;***
  - ***Work part-time.***
- They consume the second highest average daily cups of fruit and are the most likely to eat fruit daily in front of the TV;
- They complain that their families have different fruits and vegetable likes and dislikes and that it is hard find quality fruits and vegetables in local stores;
- They are the most likely to state that they need ideas about new ways to prepare fruits and vegetables;
- They are also the most likely to complain that fruit is too expensive and time consuming to purchase and prepare. One in three complain that fruit is not appetizing.

Cluster 4 – *"Moaners"* (9% of the consumer market)

Always/Almost always has dried fruit available	**29% (vs. 12% for all); 23% almost always available (vs. 10% for all)**
Second highest daily consumption of cups of fruit	*1.5 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Youngest, most likely to work part-time, least likely to be White/Caucasian and most likely to be Asian/Pacific Islander or Black/African American	*Average age is 41 (vs. 45 for all)* *26% work part-time (vs. 17% for all)* *73% White/Caucasian (vs. 84% for all), 13% Asian/Pacific Islander (vs. 5% for all), 9% Black/African-American (vs. 5% for all)*
Most likely to eat fruit daily in front of the TV, in the work cafeteria, in the car and in a restaurant	*57% eat it daily in front of the TV (vs. 25% for all)* *31% eat it daily in the work cafeteria (vs. 6% for all)* *21% eat it daily in the car (vs. 4% for all)* *16% eat it daily in a restaurant (vs. 3% for all)*
Most likely to agree that members of their family have different fruit and vegetable likes and dislikes and that this makes it difficult for them personally to include fruits and vegetables in meals and snacks	*73% agree regarding family likes/dislikes (vs. 51% for all)*
Most likely to agree that fruit is not appetizing and that quality fruits and vegetables are not available in local stores	*34% agree that fruit is not appetizing (vs. 7% for all)* *51% agree quality not available in local stores (vs. 22% for all)*
Most likely to agree that fruit is time consuming to purchase and prepare and most likely to need ideas about new ways to prepare fruits and vegetables	*38% agree that fruit is time consuming (vs. 15% for all)* *73% agree that they need more ideas (vs. 45% for all)*
Most likely to be price sensitive	*70% agree that fruit is too expensive (vs. 48% for all)*

Key Purchase Behaviors: *"Moaners"*

- The key benefits of dried fruit for ***"Moaners"*** *are:*
  - *Good snack (60% citing this benefit),*
  - *Tastes good (55% citing this benefit),*
  - *Healthy (42% citing this benefit).*
- They buy their dried fruit weekly.
  - *Daily (8%)*
  - ***Weekly (43%)***
  - *Monthly (40%)*
- They are buying slightly more compared to last year.
  - *17% buying more dried fruit in the past 3 months compared to 1 year earlier, 68% the same, 15% less*
- They waste more than average.
  - *66% do not throw any of their dried fruit out (vs. 69% for all)*
  - *11% throw out one third or less (vs. 5% for all)*

Key Purchase Behaviors: “*Moaners*”*(cont’d)*

- They buy their dried fruit primarily at the grocery store or supercenter.
  - *Grocery store (64%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (64%)*
  - *Club stores (BJ’s, Sam’s, Costco) (36%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 88% would at least scan a sign on a supermarket display and 84% a supermarket flyer/newspaper ad;*
  - *TV: 86% would at least listen to a television commercial regarding a type of food that they might enjoy and 91% to a television news segment;*
  - *Online: 65% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (40% ranked it #1).*

Key Purchase Behaviors: *"Moaners"(cont'd)*

- They are more familiar with the Fruits & Veggies – More Matters campaign…
  - *Only 42% stated that they had never seen or heard about it (vs. 53% for all)*

- …and much more likely to be motivated by it, especially to buy.
  - *68% were motivated (vs. 35% for all)*
  - *62% stated they were more likely to buy a product after seeing the "More Matters" logo (vs. 44% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *Food package(44%),*
  - *Magazines (40%),*
  - *Internet (38%).*

Cluster Profile:

“Ivy Leaguers”

Profile Summary: *"Ivy Leaguers"*

- The ***"Ivy Leaguers"*** cluster represents consumers who are the second most likely to have dried fruit in their homes;
- They represent 7% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Live in the North East;***
  - ***Be more educated and have higher incomes.***

- They consume the highest average daily cups of fruit and are the most likely to eat fruit daily at the dinner table and at their office desk;
- They are the most likely to shop for fruits and vegetables based on healthiness;
- They are the least likely to think that fruit is time consuming to purchase and prepare or that quality fruits and vegetables are not available in local stores.

Cluster 3 – *"Ivy Leaguers"* (7% of the consumer market)

Always/Almost always has dried fruit available	**21% (vs. 24% for all); 18% almost always available (vs. 17% for all)**
Highest daily consumption of cups of fruit	*1.9 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Twice as likely to live in the North East, they have above average income and education	*43% live in the North East (vs. 21% for all)* *31% earn $100k or more (vs. 16% for all)* *25% completed graduate work (vs. 12% for all)*
Most likely to shop for fruits and vegetables based on healthiness	*52% ranked "health" in their top 3 (vs. 31% for all)*
Most likely to eat fruit daily at the dinner table at home and at their office desk	*62% eat it daily at the dinner table (vs. 35% for all)* *62% eat it daily at their office desk (vs. 13% for all)*
Least likely to agree that it is difficult for them personally to include fruits and vegetables in meals and snacks because quality fruits and vegetables are not available in local stores	*82% disagree regarding local store quality (vs. 51% for all)*
Very unlikely to think that fruit is time consuming to purchase and prepare	*91% disagree that it is time consuming (vs. 60% for all)*

Key Purchase Behaviors: *"Ivy Leaguers"*

- The key benefits of dried fruit for ***"Ivy Leaguers"*** *are:*
  - *Keep well (59% citing this benefit),*
  - *Good snack (59% citing this benefit),*
  - *Tastes good (56% citing this benefit).*

- They buy their dried fruit weekly.
  - *Daily (3%)*
  - ***Weekly (47%)***
  - *Monthly (35%)*

- They are buying the same compared to last year.
  - *15% buying more dried fruit in the past 3 months compared to 1 year earlier, 71% the same, 15% less*

- They waste little.
  - *77% do not throw any of their dried fruit out; 18% throw out 1/10th or less*

Key Purchase Behaviors: "*Ivy Leaguers*" *(cont'd)*

- They buy their dried fruit primarily at the grocery store.
  - *Grocery store (74%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (62%)*
  - *Club stores (BJ's, Sam's, Costco) (38%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 87% would at least scan a sign on a supermarket display and 85% a supermarket flyer/newspaper ad;*
  - *TV: 84% would at least listen to a television commercial regarding a type of food that they might enjoy and 85% to a television news segment;*
  - *Online: 74% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (48% ranked it #1).*

Key Purchase Behaviors: *"Ivy Leaguers"(cont'd)*

- They are a little more familiar with the Fruits & Veggies – More Matters campaign…
  - *48% stated that they had never seen or heard about it (vs. 53% for all)*

- …but more likely to be motivated by it, especially to buy.
  - *59% were motivated (vs. 35% for all)*
  - *57% stated they were more likely to buy a product after seeing the "More Matters" logo (vs. 44% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *Supermarket display (59%),*
  - *TV (34%),*
  - *Magazines (28%).*

Cluster Profile:
“Struggling Fruit Lovers”

Profile Summary: *"Struggling Fruit Lovers"*

- The ***"Struggling Fruit Lovers"*** cluster represents consumers who are the third most likely to have dried fruit in their homes;
- They represent 5% of the total consumer market;
- Compared to an average consumer, they are more likely to:
    - ***Be in a couple;***
    - ***Not working outside of the home;***
    - ***Have the lowest household income and be the least educated;***
    - ***Be Hispanic/Latino.***

- Though socio-economically, they appear to be less advantaged, they are the least price sensitive when it comes to fruit probably because they are the most likely to find fruit appetizing and the least likely to find it time consuming to purchase and prepare.

Cluster 7 – *"Struggling Fruit Lovers"* (5% of the consumer market)

Always/Almost always has dried fruit available	**14% (vs. 24% for all); 11% almost always available (vs. 17% for all)**
Fifth highest daily consumption of cups of fruit	*0.8 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Most likely to be in a couple, least likely to be working outside the home, lowest household income and least educated, most likely to be Hispanic/Latino	*34% live in a 2-person household (vs. 23% for all)* *20% work outside the home (vs. 48% for all)* *70% earn less than $50k (vs. 38% for all)* *2% have completed graduate work (vs. 12% for all)* *9% are Hispanic/Latino (vs. 4% for all)*
Most likely to find fruit appetizing	*100% disagree that fruit is not appetizing (vs. 82% for all)*
Least price sensitive	*10% agree that fruit is too expensive (vs. 48% for all)*
Least likely to find fruit time consuming to purchase and prepare or that they need ideas about new ways to prepare fruits and vegetables	*0% agree that fruit is time consuming to purchase and prepare (vs. 15% for all)* *4% agree that they need new ideas (vs. 34% for all)*
Most likely to disagree that members of their family have different fruit and vegetable likes and dislikes	*79% disagree (vs. 23% for all)*

Key Purchase Behaviors: *"Struggling Fruit Lovers"*

- The key benefits of dried fruit for ***"Struggling Fruit Lovers"*** *are:*
  - *Tastes good (80% citing this benefit),*
  - *Good snack (67% citing this benefit)*
  - *I and/or my family likes them (67% citing this benefit),*
  - *Easy to use (53% citing this benefit)*
  - *Healthy (53% citing this benefit).*
- They buy their dried fruit monthly.
  - *Daily (0%)*
  - *Weekly (13%)*
  - ***Monthly (73%)***
- They are buying the same compared to last year.
  - *13% buying more dried fruit in the past 3 months compared to 1 year earlier, 73% the same, 13% less*
- They waste the least.
  - *93% do not throw any of their dried fruit out (vs.69% for all)*

Key Purchase Behaviors: *"Struggling Fruit Lovers"(cont'd)*

- They buy their dried fruit primarily at a grocery store.
  - *Grocery store (73%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (47%)*
  - *Dollar store (13%); Club stores (BJ's, Sam's, Costco) (13%)*

- Intercept them in the supermarket, on TV or the radio, on social media and online:
  - *Supermarket: 89% would at least scan a sign on a supermarket display and 89% a supermarket flyer/newspaper ad;*
  - *TV: 75% would at least listen to a television commercial regarding a type of food that they might enjoy and 82% to a television news segment;*
  - *Online: 79% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (43% ranked it #1).*

Key Purchase Behaviors: *"Struggling Fruit Lovers"(cont'd)*

- They are less familiar with the Fruits & Veggies – More Matters campaign…
  - *61% stated that they had never seen or heard about it (vs. 53% for all)*

- …but are more likely to be motivated by it, especially to buy.
  - *48% were motivated (vs. 35% for all)*
  - *53% stated they were more likely to buy a product after seeing the "More Matters" logo (vs. 44% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *TV (47%),*
  - *Supermarket display (24%),*
  - *Healthcare provider (24%).*

Cluster Profile:
“Mother Gooses”

Profile Summary: *“Mother Gooses”*

- The ***“Mother Gooses”*** cluster represents consumers who are the fourth most likely to have dried fruit in their homes;
- They represent 27% of the total consumer market, the largest segment (along with “*Middle Americans*”*);*
- Compared to an average consumer, they are more likely to:
  - ***Have a child under 18 living at home;***
  - ***Have the largest household (5 or more people).***

Cluster 6 – *"Mother Gooses"* (27% of the consumer market)

Always/Almost always has dried fruit available	**12% (vs. 24% for all); 12% almost always available (vs. 17% for all)**
Third highest daily consumption of cups of fruit	*1.5 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Most likely to have a child under 18 living at home and to live in a large household (5 people or more)	*82% have a child living at home (vs. 72% for all)* *42% live in a household with 5 or more people (vs. 26% for all)*

ON Research

Key Purchase Behaviors: *"Mother Gooses"*

- The key benefits of dried fruit for ***"Mother Gooses"*** *are:*
  - *Good snack (75% citing this benefit),*
  - *Tastes good (57% citing this benefit),*
  - *I and/or my family likes them (53% citing this benefit).*

- They buy their dried fruit monthly.
  - *Daily (0%)*
  - Weekly (23%)
  - ***Monthly (45%)***

- They are buying less compared to last year.
  - *10% buying more dried fruit in the past 3 months compared to 1 year earlier, 77% the same, 13% less*

- They waste a little less than average.
  - *71% do not throw any of their dried fruit out (vs.69% for all)*

Key Purchase Behaviors: "*Mother Gooses*"*(cont'd)*

- They buy their dried fruit primarily at the grocery store.
  - *Grocery store (74%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (59%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 84% would at least scan a sign on a supermarket display and 88% a supermarket flyer/newspaper ad;*
  - *TV: 85% would at least listen to a television commercial regarding a type of food that they might enjoy and 84% to a television news segment;*
  - *Online:75% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (43% ranked it #1).*

Key Purchase Behaviors: *"Mother Gooses"(cont'd)*

- They have slightly above average familiarity with the Fruits & Veggies – More Matters campaign…
  - *48% stated that they had never seen or heard about it (vs. 53% for all)*
- …and are a little more likely to be motivated by it, including to buy.
  - *39% were motivated (vs. 35% for all)*
  - *47% stated they were more likely to buy a product after seeing the "More Matters" logo (vs. 44% for all)*
- The top 3 ways they self-report learning about the campaign are:
  - *Supermarket display (42%),*
  - *Magazines (25%),*
  - *Ads (25%).*

Cluster Profile:
“Mr. Middle Ageds”

Profile Summary: *"Mr. Middle Ageds"*

- The ***"Mr. Middle Ageds"*** cluster represents consumers who are the third least likely to have dried fruit in their homes;
- They represent 13% of the total consumer market;
- Compared to an average consumer, they are:
  - ***The oldest;***
  - ***Most likely to be male;***
  - ***Least likely to have a child under 18 living at home.***

- They are also the least likely to eat fruit at their office desk or in their car.

Cluster 2 – *"Mr. Middle Ageds"* (13% of the consumer market)

Always/Almost always has dried fruit available	**9% (vs. 24% for all); 10% almost always available (vs. 17% for all)**
Second lowest daily consumption of cups of fruit	*0.7 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Oldest, most likely to be male, least likely to have a child under 18 living at home	*Average age is 54 (vs. 45 for all)* *36% are male (vs. 20% for all)* *53% have a child under 18 living at home (vs. 72% for all)*
Least likely to eat fruit at their office desk or in their car	*82% never eat fruit at their office desk (vs. 56% for all)* *56% never eat fruit in their car (vs. 38% for all)*

Key Purchase Behaviors: *"Mr. Middle Ageds"*

- The key benefits of dried fruit for ***"Mr. Middle Ageds"*** *are:*
  - *Good snack (66% citing this benefit),*
  - *Keep well (50% citing this benefit),*
  - *Tastes good (47% citing this benefit).*

- They buy their dried fruit monthly.
  - *Daily (0%)*
  - Weekly (19%)
  - ***Monthly (44%)***

- They are buying the same compared to last year.
  - *13% buying more dried fruit in the past 3 months compared to 1 year earlier, 75% the same, 13% less*

- They waste little.
  - *66% do not throw any of their dried fruit out (vs.69% for all)*

Key Purchase Behaviors: "*Mr. Middle Ageds*"*(cont'd)*

- They buy their dried fruit primarily at the grocery store.
  - *Grocery store (69%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (44%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 86% would at least scan a sign on a supermarket display and 84% a supermarket flyer/newspaper ad;*
  - *TV: 74% would at least listen to a television commercial regarding a type of food that they might enjoy and 84% to a television news segment;*
  - *Online: 74% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (47% ranked it #1).*

Key Purchase Behaviors: *"Mr. Middle Ageds"(cont'd)*

- They have below average familiarity with the Fruits & Veggies – More Matters campaign…
  - *62% stated that they had never seen or heard about it (vs. 53% for all)*

- …and are much less likely to be motivated by it or to buy because of it.
  - *17% were motivated (vs. 35% for all)*
  - *34% stated they were more likely to buy a product after seeing the "More Matters" logo (vs. 44% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *Supermarket display (41%),*
  - *TV (24%),*
  - *Ads (21%).*

Cluster Profile:
“Middle Americans”

Profile Summary: *"Middle Americans"*

- The ***"Middle Americans"*** cluster represents consumers who are the second least likely to have dried fruit in their homes;
- They represent 27% of the total consumer market, the largest segment of the market (along with *"Mother Gooses");*
- Compared to an average consumer, they are:
  - ***Most likely to be White/Caucasian;***
  - ***More likely to have below average income and to be less educated.***

- They consume the least amount of cups of fruit per day and are the least likely to eat fruit daily at the dinner table, in front of the TV or in a restaurant.

Cluster 5 – *"Middle Americans"* (27% of the consumer market)

Always/Almost always has dried fruit available	**7% (vs. 24% for all); 5% almost always available (vs. 17% for all)**
Lowest daily consumption of cups of fruit	*0.5 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Most likely to be White/Caucasian, they have below average income, and are less educated	*90% are White/Caucasian (vs. 84% for all)* *49% earn less than $50k (vs. 38% for all)* *35% only completed high school or less (vs. 22% for all)*
Least likely to eat fruit daily at the dinner table at home and most likely to never eat fruit in front of the TV or in a restaurant	*11% eat fruit daily at the dinner table (vs. 35% for all)* *14% never eat fruit in front of the TV (vs. 11% for all)* *27% never eat fruit in a restaurant (vs. 15% for all)*

Key Purchase Behaviors: *"Middle Americans"*

- The key benefits of dried fruit for ***"Middle Americans"*** *are:*
  - *Good snack (51% citing this benefit),*
  - *Keep well (34% citing this benefit),*
  - *Tastes good (32% citing this benefit).*
- They buy their dried fruit a few times a year.
  - *Daily (0%)*
  - Weekly (19%)
  - *Monthly (32%)*
  - ***A few times a year (49%)***
- They are buying less compared to last year.
  - *6% buying more dried fruit in the past 3 months compared to 1 year earlier, 75% the same, 19% less*
- They waste a little more than average.
  - *64% do not throw any of their dried fruit out (vs.69% for all)*

Key Purchase Behaviors: "*Middle Americans*"*(cont'd)*

- They buy their dried fruit primarily at the grocery store.
  - *Grocery store (68%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (34%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 75% would at least scan a sign on a supermarket display and 80% a supermarket flyer/newspaper ad;*
  - *TV: 76% would at least listen to a television commercial regarding a type of food that they might enjoy and 76% to a television news segment;*
  - *Online: 74% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (51% ranked it #1).*

Key Purchase Behaviors: *"Middle Americans"(cont'd)*

- They have below average familiarity with the Fruits & Veggies – More Matters campaign…
  - *63% stated that they had never seen or heard about it (vs. 53% for all)*

- …and are much less likely to be motivated by it, especially to buy.
  - *17% were motivated (vs. 35% for all)*
  - *26% stated they were more likely to buy a product after seeing the "More Matters" logo (vs. 44% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *TV (40%),*
  - *Supermarket display (37%),*
  - *Food package (18%).*

Cluster Profile:
"MidWest Affluents"

Profile Summary: *"MidWest Affluents"*

- The ***"MidWest Affluents"*** cluster represents consumers who are the least likely to have dried fruit in their homes;
- They represent 12% of the total consumer market;
- Compared to an average consumer, they are:
  - ***More likely to have a child under 18 living at home;***
  - ***Have the highest income and to be the most educated;***
  - ***To live in the MidWest.***

- They are the least likely to shop for fruits and vegetables based on healthiness.

Cluster 1 – *"MidWest Affluents"* (12% of the consumer market)

Always/Almost always has dried fruit available	**6% (vs. 24% for all); 5% almost always available (vs. 17% for all)**
Fourth highest daily consumption of cups of fruit	*1.4 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
More likely to have a child under 18 living at home, highest income and most educated, more likely to live in the Mid West and less likely in the South	*81% have a child under 18 living at home (vs. 72% for all)* *32% earn $100k or more (vs. 16% for all)* *27% completed graduate work (vs. 12% for all)* *36% live in the Mid West (vs. 28% for all), 24% live in the South (vs. 33% for all)*
Least likely to shop for fruits and vegetables based on healthiness	*21% ranked health in their top 3 (vs. 31% for all)*

Key Purchase Behaviors: *"MidWest Affluents"*

- The key benefits of dried fruit for ***"MidWest Affluents"*** *are:*
  - *Good snack (76% citing this benefit),*
  - *Keep well (49% citing this benefit),*
  - *I and/or my family likes them (46% citing this benefit)/ Tastes good (46% citing this benefit).*
- They buy their dried fruit monthly.
  - *Daily (0%)*
  - Weekly (30%)
  - ***Monthly (36%)***
- They are buying less compared to last year.
  - *6% buying more dried fruit in the past 3 months compared to 1 year earlier, 82% the same, 12% less*
- They waste more than an average consumer.
  - *61% do not throw any of their dried fruit out (vs.69% for all)*

Key Purchase Behaviors: "*MidWest Affluents*"*(cont'd)*

- They buy their dried fruit primarily at the grocery store.
  - *Grocery store (88%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (49%)*
  - *Club stores (BJ's, Sam's Costco) (30%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 84% would at least scan a sign on a supermarket display and 87% a supermarket flyer/newspaper ad;*
  - *TV: 88% would at least listen to a television commercial regarding a type of food that they might enjoy and 91% to a television news segment;*
  - *Online: 81% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (66% ranked it #1).*

Key Purchase Behaviors: *"MidWest Affluents"(cont'd)*

- They are a little more likely to be familiar with the Fruits & Veggies – More Matters campaign…
  - *43% stated that they had never seen or heard about it (vs. 53% for all)*

- …but a little less likely to be motivated by it (though equally likely to buy because of it).
  - *31% were motivated (vs. 35% for all)*
  - *45% stated they were more likely to buy a product after seeing the "More Matters" logo (vs. 44% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *Supermarket display (36%),*
  - *Magazines (22%),*
  - *Food package (21%).*