Research conducted by:

ON Research

On behalf of:

PRODUCE FOR BETTER HEALTH FOUNDATION:

PBH Foundation - Cluster Analysis

2012 Report: Fresh 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

Summary of Key Findings and Observations

- Fresh fruit is extremely popular.
    - *Only 1 % of consumers never have fresh fruit available in their homes*

- Six (6) clusters define the fresh fruit consumer market, and the size of these clusters varies from very small (6% of total) to relatively large (28%) *[ranked below in order of availability of fresh fruit, from highest to lowest].*
    1. *"Health Enthusiasts" (6% of total consumer market)*
    2. *"Balanced Seniors" (28% of total consumer market)*
    3. *"Indulgents"(16% of total consumer market)*
    4. *"Bargain Hunters" (13% of total consumer market)*
    5. *"Finnickies" (17% of total consumer market)*
    6. *"Forfeiters" (20% 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.
  - *Age,*
  - *Ethnicity,*
  - *Employment status.*
- The healthiness of fresh fruit is a critical purchase driver. While taste (a personal and subjective matter) is also very important, some consumers appear willing to trade-off taste, and family preferences, for healthiness. Marketing of the health benefits of fresh fruit is a significant opportunity, especially when targeting below average consumers of fresh fruit who feel guilty that they are their families currently eat too little fruit.
- Cost is a significant barrier for many. However, net consumption across all clusters, even the most price-sensitive ones, is higher than last year. Since wastage appears to be a driver of dissatisfaction that may lead to lower consumption, tools and resources to educate consumers on reducing wastage may be beneficial in stimulating demand.

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 fresh fruit are weekly, frequency will be critical.

- In terms of reach, certain clusters may represent especially attractive targets:
  - *"Finnickies"* (feel the most guilty about their below average consumption of fruit, shop more based on convenience of use)
  - *"Forfeiters"* (also feel guilty, shop mainly due to family preferences so need to target influencers)
  - *"Balanced Seniors"* (least price-sensitive, largest audience, already perceive fruit as healthy)

Summary of Key Findings and Observations

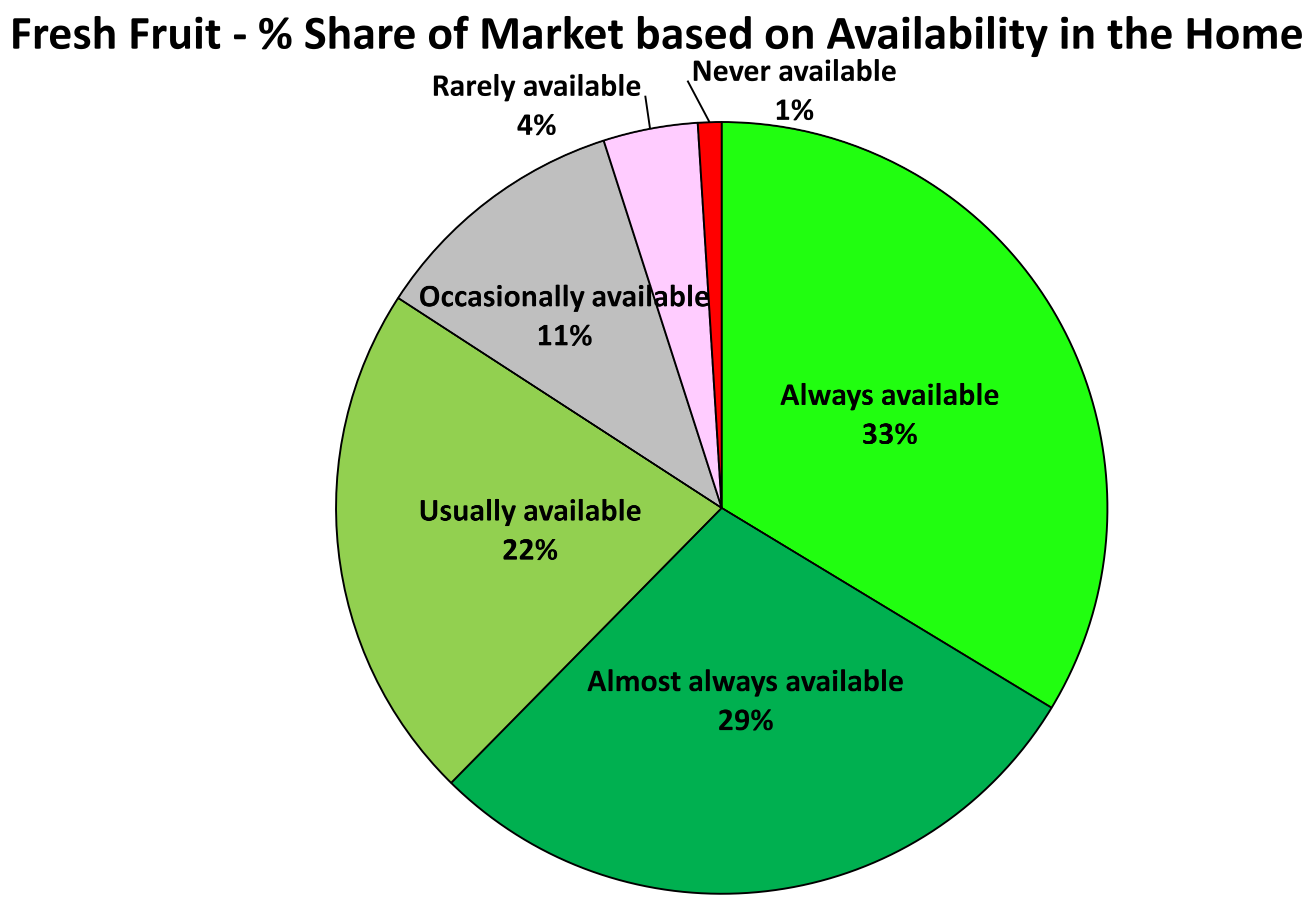
- Increased visibility of the Fruits & Veggies – More Matters campaign may help stimulate demand.
  - *"Health Enthusiasts" (the highest consumers of fresh fruit) have both above average awareness and motivation;*
  - *"Bargain Hunters" are a little more likely to purchase due to exposure to the campaign.*

- 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 fresh fruit in the home

- Only 1% of consumers never have fresh fruit available in their homes.



n=1,300

Cluster Drivers

➢ Cluster analysis revealed that 43 of the 81 independent variables tested significantly and differentiated segments with the consumer market regarding fresh 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, Education, Work Status, Residential location, Ethnicity, Age;*
- *Daily consumption of all forms of fruit;*
- *Satisfaction with daily eating habits regarding fruit;*
- *Perceived healthiness;*
- *Consumption occasions;*
- *Barriers to including fruits and vegetables in meals and snacks.*

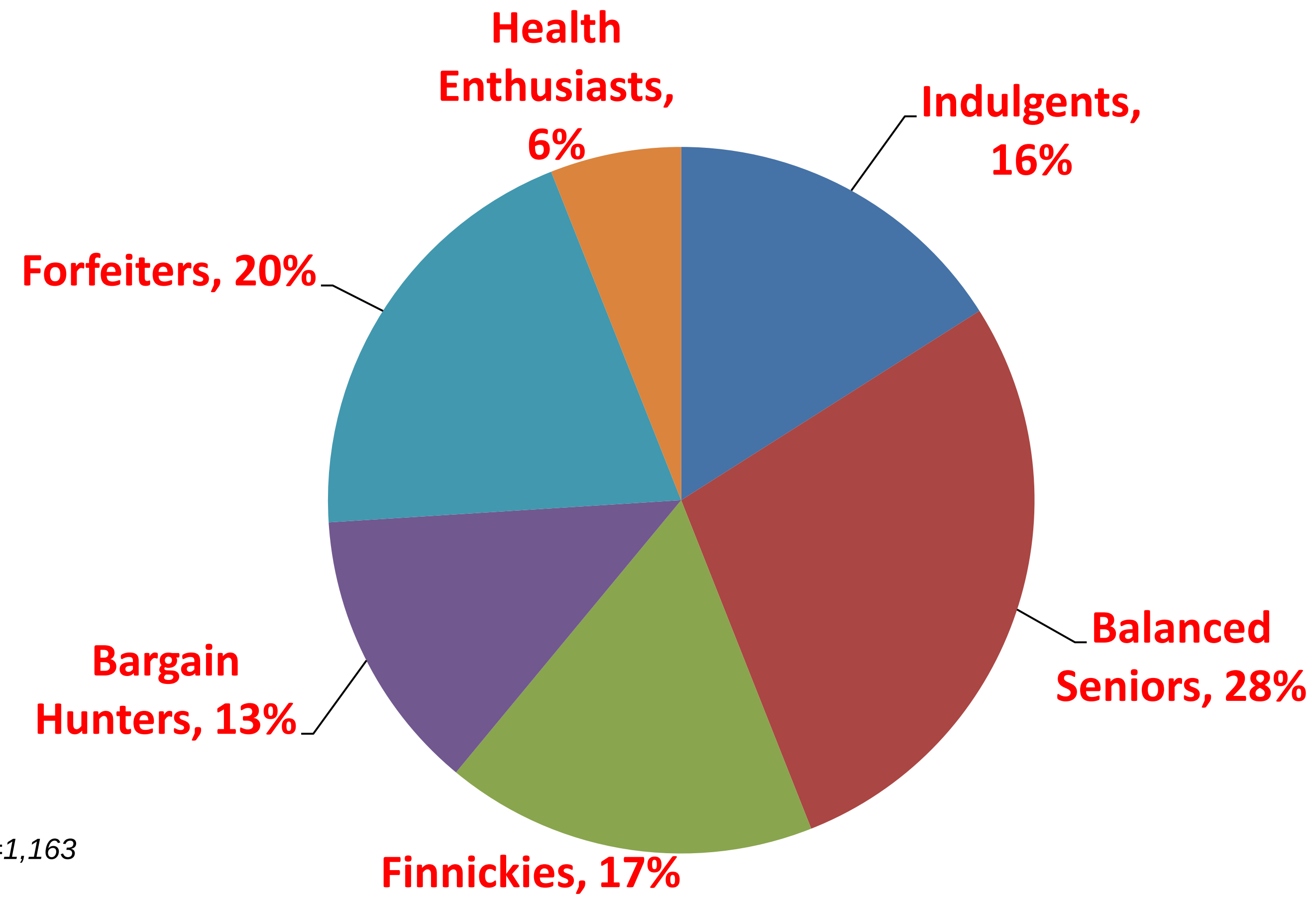
Secondary Cluster Drivers

- *Gender;*
- *Children living at home;*
- *Factors when shopping for and eating fruits and vegetables;*
- *Disease prevention;*
- *Time spent preparing dinner.*

Cluster analysis produced 6 clusters for fresh fruit

➢The size of the clusters range from very small (6%) to relatively large (28%).

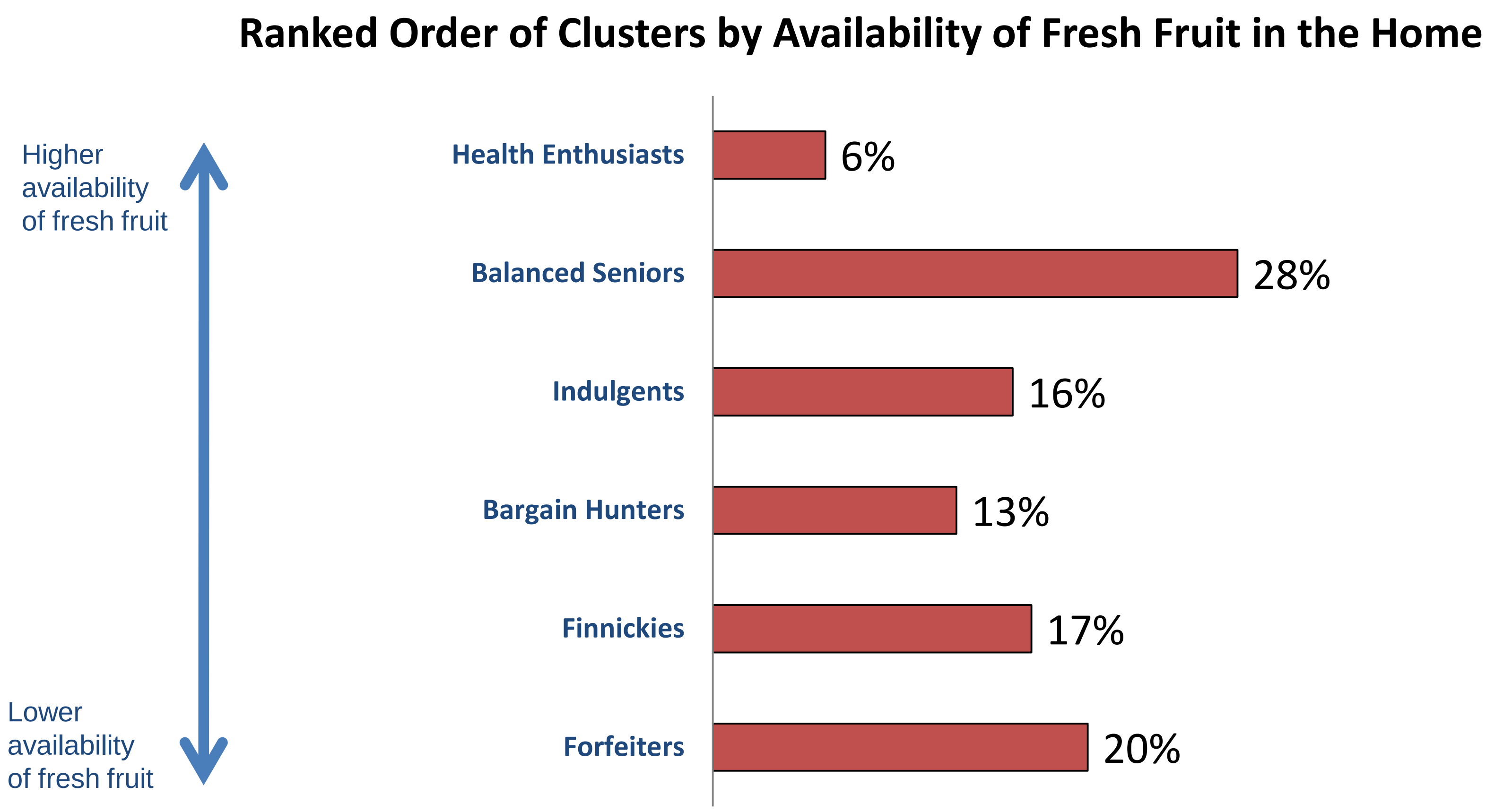
Fresh Fruit – Distribution of Consumers by Cluster



n=1,163

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

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



Cluster Profile:
“Health Enthusiasts”

Profile Summary: *"Health Enthusiasts"*

- The ***"Health Enthusiasts"*** cluster represents consumers who are most likely to have fresh fruit in their homes;
- They represent 6% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Be younger and single;***
  - ***Work full-time;***
  - ***Be African-American or Asian/Pacific Islander.***
- They are the most likely to have fruit in general always available in their home, especially 100% fruit juice and are the most satisfied with their current level of fruit consumption;
- They are the least price-sensitive and buy fruits not for their taste but for their freshness and especially their healthiness, often to get more energy;
- They are committed to buying fruits and vegetables and almost all make sure they have a piece of fruit at dinner.

Cluster 6 – *"Health Enthusiasts"* (6% of the consumer market)

Always has fresh fruit available	**77% (vs. 34% for all); 13% almost always available (vs. 29% for all)**
Most likely to always have fruit in general always available, especially 100% fruit juice	*79% have fruit in general always available (vs. 43% for all)* *69% have 100% fruit juice available (vs. 36% for all)*
Key Characteristics	
Most likely to be single, younger, full-time worker, and more likely to be Asian/Pacific Islander or African-American	*Average age is 37 (vs. 45 for all)* *30% are single (vs. 15% for all)* *53% work full-time (vs. 32% for all)* *17% African-American (vs. 7% for all) and 13% Asian/Pacific Islander (vs. 4% for all)*
Second highest overall fruit consumption	*3.8 servings per day (vs. 2.4 for all)*
Most satisfied with their fruit consumption	*73%: I/we eat just enough (vs. 41% for all)*
Care most about freshness and **healthiness** when shopping for fruits and vegetables	*73% ranking freshness in their top 3 most important factors when shopping for fruits and vegetables (vs. 62% for all) while 63% rank healthiness in their top 3 (vs. 33% for all)*
Less price sensitive when shopping for fruits and vegetables	*51% ranking "cost" in their top 3 most important factors when shopping for fruits and vegetables (vs. 63% for all)* *Only 8% agree that fruits and vegetables are too expensive for them to personally include in meals and snacks (vs. 48% for all)*
Taste is less important as a reason for buying fruits and vegetables	*47% ranking it in their top 3 most important factors when shopping for fruits and vegetables (vs. 61% for all)*
Most likely that fruit is top-of-mind and to eat fruit daily, especially at the dinner table	*4% agree that they forget to buy fruits and vegetables (vs. 17% for all)* *86% eat it daily at the dinner table at home (vs. 35% for all)*
Most likely to eat fruits and vegetables to get energy	*34% (vs. 19% for all)*

Key Purchase Behaviors: *"Health Enthusiasts"*

- The key benefits of fresh fruit for ***"Health Enthusiasts"*** *are:*
  - *Healthiness (95% citing this benefit),*
  - *Good taste (91% citing this benefit),*
  - *Good snack (81% citing this benefit).*
- They buy their fresh fruit weekly.
  - *Daily (19%)*
  - ***Weekly (76%)***
  - *Monthly (5%)*
- They are buying more compared to last year.
  - *38% buying more fresh fruit in the past 3 months compared to 1 year earlier, 62% the same*
- They waste very little.
  - *52% do not throw any of their fresh fruit out*
  - *43% throw out 1/10th or less and 5% throw out 1/4th or less*

Key Purchase Behaviors: *"Health Enthusiasts"(cont'd)*

- They buy their fresh fruit primarily at the grocery store but are, by far, the most likely to buy at a farmer's market and their local fruit vendor.
  - *Grocery store (91%)*
  - *Farmer's market or local fruit stand (62%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (57%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 93% would at least scan a sign on a supermarket display and 89% a supermarket flyer/newspaper ad;*
  - *TV: 91% would at least listen to a television commercial regarding a type of food that they might enjoy and 83% to a television news segment;*
  - *Online: 73% 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; 46% ranked it #1 while 84% would scan an Internet ad regarding a type of food they might enjoy.*

Key Purchase Behaviors: *"Health Enthusiasts"(cont'd)*

- They are much more familiar with the Fruits & Veggies – More Matters campaign…
  - *Only 34% stated that they had never seen or heard about it (vs. 53% for all)*
  - *They were more likely to state they had heard about it in ads (34% vs. 23% for all) and twice as likely in the newspaper (22% vs. 10% for all).*

- …and twice as likely to be motivated by it, especially to buy.
  - *68% were motivated (vs. 35% for all)*
  - *67% 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 displays (40%),*
  - *TV (29%),*
  - *Magazines (25%).*

Cluster Profile:

“Balanced Seniors”

Profile Summary: *"Balanced Seniors"*

- The ***"Balanced Seniors"*** cluster represents consumers who are likely to have fresh fruit in their homes more than an average consumer;
- They represent 28%, the largest segment of the total consumer market;
- Compared to an average consumer, they are:
  - ***The oldest;***
  - ***The least likely to be single and to have a child living at home.***
- They are the most likely to consider fresh fruits and vegetables as very healthy and to eat them as part of a balanced diet;
- They are the least price-sensitive.

Cluster 2 – *"Balanced Seniors"* (28% of the consumer market)

Always has fresh fruit available **Almost always has fresh fruit available**	**45% (vs. 34% for all)** **30% (vs. 29% for all)**
Key Characteristics	
Oldest of all the segments, least likely to have a child under 18 living at home and the least likely to be single	*Average age is 51 (vs. 45 for all) – 38% are 55+* *8% are single (vs. 15% for all)* *63% have a child under 18 living at home (vs. 71% for all)*
While taste is less important as a reason for buying fruits and vegetables, they are the most likely to personally eat fruits and vegetables because they like the taste and to stay healthy	*47% ranking "taste" in their top 3 most important factors when shopping for fruits and vegetables (vs. 61% for all)* *62% ranking "like the taste" in their 3 top reasons why they themselves eat fruits and vegetables (vs. 51% for all)* *86% ranking "to stay healthy" in their top 3 most important reasons for why they themselves eat fruits and vegetables (vs. 79% for all)*
Least likely to be price-sensitive	*50% ranking "cost" in their top 3 most important factors when shopping for fruits and vegetables (vs. 63% for all)*
Most likely to eat fruits and vegetables as part of a balanced diet	*68% ranking "part of a balanced diet" in their top 3 most important reasons for why they themselves eat fruits and vegetables vs. 57% for all)*
Most likely to perceive fresh fruits as healthy	*94% consider fresh fruits and vegetables as very healthy (vs. 88% for all)*
More likely to spend time making dinner	*38 mins (vs. 33 mins for all)*
Least likely to eat fruits and vegetables to get energy	*15% (vs. 19% for all)*

Key Purchase Behaviors: *“Balanced Seniors”*

- The key benefits of fresh fruit for ***“Balanced Seniors”*** *are:*
  - *Healthiness (94% citing this benefit),*
  - *Good taste (88% citing this benefit),*
  - *Good snack (84% citing this benefit).*

- They buy their fresh fruit weekly.
  - *Daily (5%)*
  - ***Weekly (86%)***
  - *Monthly (7%)*

- They are buying about the same compared to last year.
  - *21% stated they were buying more, 73% the same and 6% less*

- They waste little.
  - *40% do not throw any of their fresh fruit out*
  - *50% throw out 1/10th or less and 8% throw out 1/4th or less*

Key Purchase Behaviors: *"Balanced Seniors"(cont'd)*

- They buy their fresh fruit primarily at the grocery store.
  - *Grocery store (93%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (50%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 86% would at least stop and scan supermarket display regarding a type of food that they might enjoy and 91% to a supermarket flyer/newspaper ad;*
  - *TV: 80% 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: 73% ranked the Internet in their Top 3 places to go to obtain information about to get themselves or their family to eat more fruits and vegetables.*

Key Purchase Behaviors: *"Balanced Seniors"(cont'd)*

- They have average familiarity with the Fruits & Veggies – More Matters campaign…
  - *55% stated that they had never seen or heard about it (vs.53% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *Supermarket displays (46%),*
  - *TV (28%),*
  - *Magazines (20%).*

Cluster Profile:

“Indulgents”

Profile Summary: *“Indulgents”*

- The ***“Indulgents”*** cluster represents consumers who are slightly more likely than the average consumer to have fresh fruit available in the home;
- They represent 16% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Have higher income;***
  - ***Be more educated;***
  - ***Be employed;***
  - ***Be married/living with someone.***
- They distinguish themselves by being the consumer that is most likely to rank taste as the most important factor when shopping for fruits and vegetables.

Cluster 1 – *"Indulgents"* (16% of the consumer market)

Always has fresh fruit available **Almost always has fresh fruit available**	**32% (vs. 34% for all)** **44% (vs. 29% for all)**
Key Characteristics	
Highest average income, most educated, most likely to be employed and more likely to be married/living with someone	*71% earn at least $50k (vs. 50% for all)* *59% have at least a college degree (vs. 42% for all)* *88% are employed outside the home (vs. 51% for all)* *83% are married/living with someone (vs.73% for all)*
Taste is more important as a reason for buying fruits and vegetables	*70% ranking it in their top 3 most important factors when shopping for fruits and vegetables (vs. 61% for all)*

Key Purchase Behaviors: *"Indulgents"*

- The key benefits of fresh fruit for ***"Indulgents"*** *are:*
  - *Healthiness (92% citing this benefit),*
  - *Good taste (86% citing this benefit).*

- They buy their fresh fruit weekly.
  - *Daily (3%)*
  - ***Weekly (90%)***
  - *Monthly (6%)*

- They are buying about the same compared to last year.
  - *22% buying more, 75% about the same, 3% less*

- They waste more than average.
  - *18% do not throw any of their fresh fruit out (vs. 28% for all)*
  - *60% throw out 1/10th or less and 15% throw out 1/4th or less*

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

- They buy their fresh fruit primarily at the grocery store.
    - *Grocery store (90%)*
    - *Supercenter (Wal-mart, Super Target, Meijer) (58%)*

- Intercept them in the supermarket, on TV and online:
    - *Supermarket: 86% would least stop and scan a sign on a supermarket display regarding a type of food that they might enjoy and 87% a supermarket flyer/newspaper ad;*
    - *TV: 87% would at least listen to a television commercial regarding a type of food that they might enjoy and 90% to a television news segment;*
    - *Online: 80% ranked the Internet in their Top 3 places to go to obtain information about to get themselves or their family to eat more fruits and vegetables.*

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

- They are a little more familiar with the Fruits & Veggies – More Matters campaign.
  - *47% stated that they had never seen or heard about it (vs. 53% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *Magazines (38%),*
  - *Supermarket displays (34%),*
  - *Ads (28%).*

Cluster Profile:
"Bargain Hunters"

Profile Summary: *"Bargain Hunters"*

- The ***"Bargain Hunters"*** cluster represents an average consumer when it comes to having fresh fruit available in their home;
- They represent 13% of the total consumer market;
- Compared to an average consumer, they are:
  - ***More likely to be White/Caucasian;***
  - ***The least likely to be male;***
  - ***The most likely not to be working outside the home.***
- They are the most price-sensitive and least likely to be concerned about the healthiness of fruits and vegetables when shopping though almost all recognize that fruits and vegetables help prevent heart disease [price trumps all].

Cluster 5 – *"Bargain Hunters"* (13% of the consumer market)

Always has fresh fruit available **Almost always has fresh fruit available**	**30% (vs. 34% for all)** **36% (vs. 29% for all)**
Key Characteristics	
Least likely to be male, most likely to be white/Caucasian and not be working	*10% male (vs. 23% for all)* *90% white/Caucasian (vs. 81% for all)* *23% are employed outside the home (vs. 51% for all)*
Less likely to be concerned about family preferences and healthiness as a reason for buying fruits and vegetables	*20% ranking "family preferences" in their top 3 most important factors when shopping for fruits and vegetables (vs. 61% for all)* *23% ranking "healthy" in their top 3 (vs. 33% for all)*
Most price-sensitive	*80% ranking "cost" in their top 3 most important factors when shopping for fruits and vegetables (vs. 63% for all)*
Most likely to believe that consuming fruits and vegetables may be beneficial in preventing heart disease	*82% believe this (vs. 68% for all)*
More likely to spend time making dinner	*38 mins (vs. 33 mins for all)*

Key Purchase Behaviors: *"Bargain Hunters"*

- The key benefits of fresh fruit for ***"Bargain Hunters"*** *are:*
  - *Healthiness (94% citing this benefit),*
  - *Good taste (87% citing this benefit),*
  - *Good snack (87% citing this benefit).*

- They buy their fresh fruit weekly.
  - *Daily (2%)*
  - ***Weekly (91%)***
  - *Monthly (7%)*

- They are buying about the same compared to last year.
  - *30% are buying more, 62% about the same, 8% less*

- They waste more than the average.
  - *19% do not throw any of their fresh fruit out (vs. 24% for all)*
  - *58% throw out 1/10th or less and 21% throw out 1/4th or less (vs. 14% for all)*

Key Purchase Behaviors: *"Bargain Hunters"(cont'd)*

- They buy their fresh fruit primarily at the grocery store.
  - *Grocery store (87%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (66%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 86% would at least stop and scan a sign on a supermarket display regarding a type of food that they might enjoy and 88% a supermarket flyer/newspaper ad;*
  - *TV: 81% would at least listen to a television commercial and 86% to a television news segment;*
  - *Online: 77% ranked the Internet in their Top 3 places to go to obtain information about to get themselves or their family to eat more fruits and vegetables.*

Key Purchase Behaviors: *"Bargain Hunters"(cont'd)*

- They are a little more familiar with the Fruits & Veggies – More Matters campaign…
  - *47% stated that they had never seen or heard about it (vs. 53% for all)*
- …and a little more likely to buy because of it.
  - *50% 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 displays (44%),*
  - *Food packages (35%),*
  - *TV (29%).*

Cluster Profile:
“Finnickies”

Profile Summary: *"Finnickies"*

- The ***"Finnickies"*** cluster represents consumers who are a little less likely to have fresh fruit in their homes;
- They represent 17% of the total consumer market;
- They distinguish themselves as being the most guilty (most likely to feel they and their families eat too little fruit);
- They are the least likely to like the taste of fruits and vegetables yet taste is a top priority when shopping;
- They are also the most likely to shop based on convenience of use and spend the least amount of time making dinner.

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Cluster 4 – *"Finnickies"* (17% of the consumer market))

Always has fresh fruit available **Almost always has fresh fruit available**	**30% (vs. 34% for all)** **30% (vs. 29% for all)**
Key Characteristics	
Most likely to feel that they/their family eat too little fruit	*74% (vs. 55% for all)*
Taste is more important as a reason for buying fruits and vegetables but they are the least likely to cite taste as an important reason why they themselves eat fruits and vegetables	*71% ranking "taste" in their top 3 most important factors when shopping for fruits and vegetables (vs. 61% for all)* *35% ranking "like the taste" in their 3 top reasons why they themselves eat fruits and vegetables (vs. 51% for all)*
Most likely to shop **on convenience of use**	*31% ranking "convenient to use" in their top 3 most important factors when shopping for fruits and vegetables (vs. 15% for all)*
Spend the least amount of time making dinner	*29 mins (vs. 33 mins for all)*

Key Purchase Behaviors: *“Finnickies”*

- The key benefits of fresh fruit for ***“Finnickies”*** *are:*
  - *Healthiness (85% citing this benefit),*
  - *Good taste (82% citing this benefit).*

- They buy their fresh fruit weekly.
  - *Daily (4%)*
  - ***Weekly (82%)***
  - *Monthly (14%)*

- They are buying about the same compared to last year.
  - *28% are buying more, 69% about the same, 3% less*

- They waste more than the average.
  - *12% do not throw any of their fresh fruit out (vs. 24% for all)*
  - *54% throw out 1/10th or less and 21% throw out 1/4th or less (vs. 14% for all)*

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

- They buy their fresh fruit primarily at the grocery store.
  - *Grocery store (88%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (52%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 78% would at least stop and scan a sign on a supermarket display and 82% a supermarket flyer/newspaper ad;*
  - *TV: 81% 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: 77% ranked the Internet in their Top 3 places to go to obtain information about to get themselves or their family to eat more fruits and vegetables.*

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

- They have an average familiarity with the Fruits & Veggies – More Matters campaign…
  - *53% stated that they had never seen or heard about it (vs. 53% for all)*
- …and were less likely to be motivated by it.
  - *23% were motivated (vs. 35% for all)*
- The top 3 ways they self-report learning about the campaign are:
  - *TV (37%),*
  - *Supermarket displays (33%),*
  - *Magazines (20%).*

Cluster Profile:
“Forfeiters”

Profile Summary: *“Forfeiters”*

- The ***“Forfeiters”*** cluster represents consumers who are least likely to have fresh fruit in their homes;
- They represent 20% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Have the lowest HHI;***
  - ***Be the least educated.***
- They consume the least amount of fruit per day and are the most likely to feel that they and their families eat too little fruit;
- They are much more concerned about their family’s preferences than about healthiness;
- They are more likely to be price-sensitive.

Cluster 6 – *"Forfeiters"* (20% of the consumer market)

Always has fresh fruit available **Almost always has fresh fruit available**	**11% (vs. 34% for all)** **20% (vs. 29% for all)**
Key Characteristics	
Least likely to always have fruit (in general) always available, especially juice	*16% have fruit in general always available (vs. 43% for all)* *100% fruit juice: 15% (vs. 36% for all); Frozen: 4% (vs. 14% for all); Dried: 4% (vs. 11% for all); Canned: 14% (vs. 23% for all)*
Lowest fruit consumption	*1.4 servings per day (vs. 2.4 for all)*
Lowest HHI, least educated	*61% earn less than $50k (vs. 50% for all)* *28% have at least a college degree (vs. 42% for all)*
Most likely to feel that they/their family eat too little fruit	*82% (vs. 55% for all)*
Most likely to be concerned about family preferences and least concerned about healthiness	*48% ranking "family preferences" in their top 3 most important factors when shopping for fruits and vegetables (vs. 31% for all)* *18% ranking "health" in their top 3 (vs. 33% for all)*
More likely to be price-sensitive	*76% ranking "cost" in their top 3 most important factors when shopping for fruits and vegetables (vs. 63% for all)*
Least likely to believe that eating fruits and vegetables helps prevent cancer or depression	*35% believe it helps prevent cancer (vs. 47% for all) while 14% depression (vs. 26% for all)*
Least likely to eat fruit daily at the dinner table, in front of the TV, in their work cafeteria, at their office desk, or in their car	*8% it daily at the dinner table (vs. 35% for all)* *3% eat it daily in front of the TV (vs. 25% for all)* *1% eat it daily in the work cafeteria (vs. 7% for all)* *0% eat it daily at their office desk (vs. 12% for all) or in their car (vs. 5% for all)*

Key Purchase Behaviors: *"Forfeiters"*

- The key benefits of fresh fruit for ***"Forfeiters"*** *are:*
  - *Healthiness (83% citing this benefit),*
  - *I and/or my family likes them (75% citing this benefit),*
  - *Tastes good (74% citing this benefit).*

- They buy their fresh fruit weekly and are the most likely to buy it monthly.
  - *Daily (1%)*
  - ***Weekly (72%)***
  - *Monthly (25%)*

- They are buying about the same compared to last year.
  - *17% are buying more, 75% about the same, 8% less*

- They waste a little more than average.
  - *25% do not throw any of their fresh fruit out (vs. 28% for all)*

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

- They buy their fresh fruit primarily at the grocery store.
  - *Grocery store (85%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (59%)*

- Intercept them in the supermarket, on TV and online.
  - *Supermarket: 77% would at least stop and scan a sign on a supermarket display regarding a type of food that they might enjoy and 79% 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 75% to a television news segment;*
  - *Online: 69% ranked the Internet in their Top 3 places to go to obtain information about to get themselves or their family to eat more fruits and vegetables.*

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

- They are the least familiar with the Fruits & Veggies – More Matters campaign…
  - *66% stated that they had never seen or heard about it (vs. 53% for all)*

- …and the least motivated by it.
  - *20% were motivated (vs. 35% for all)*

- The top 3 ways they self-report learning about the campaign are:
  - *Supermarket displays (43%),*
  - *TV (30%),*
  - *Magazines (23%).*