Research conducted by:

ON Research

On behalf of:

PRODUCE FOR BETTER HEALTH FOUNDATION:

PBH Foundation - Cluster Analysis

2012 Report: Fresh Vegetables

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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 vegetables is extremely popular.
  - *Only 1% of consumers never have fresh vegetables available in their homes and more than one in three (38%)* ***always*** *have it available*

- Six (6) clusters define the fresh vegetables consumer market, and the size of these clusters varies from 9% to 27% *[ranked below in order of availability of fresh vegetables, from highest to lowest].*
  1. *"Balanced Eaters" (9% of total consumer market)*
  2. *"Fresh Veggie Lovers" (17% of total consumer market)*
  3. *"Affluents" (9% of total consumer market)*
  4. *"Senior Healthies" (27% of total consumer market)*
  5. *"Young On the Gos" (12% of total consumer market)*
  6. *"Lower Income Moms" (26% 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:
  - *Ethnicity,*
  - *Age,*
  - *Work Status.*

- The consumption of fresh vegetables is somewhat correlated to the consumption of vegetables in general while the consumption of fresh vegetables is not primarily driven by price.

- Notably, all segments self-reported increasing their consumption of fresh vegetables this year compared to last, including those with the lowest current consumption of fresh vegetables.

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 cluster. As such, a more mass communications approach can be considered. Since most purchases for fresh vegetables are weekly, frequency will be critical.

- In terms of reach, certain clusters may represent especially attractive targets:
  - *"Senior Healthies"* (the largest segment, third least likely to have fresh vegetables always available but highest overall consumption of all forms of vegetables, most likely to cite balanced diet and locally grown as key purchase drivers, most likely to consider fresh fruits and vegetables as healthy);
  - *"Young On the Gos"* (second least likely to have fresh vegetables always available, most guilty).

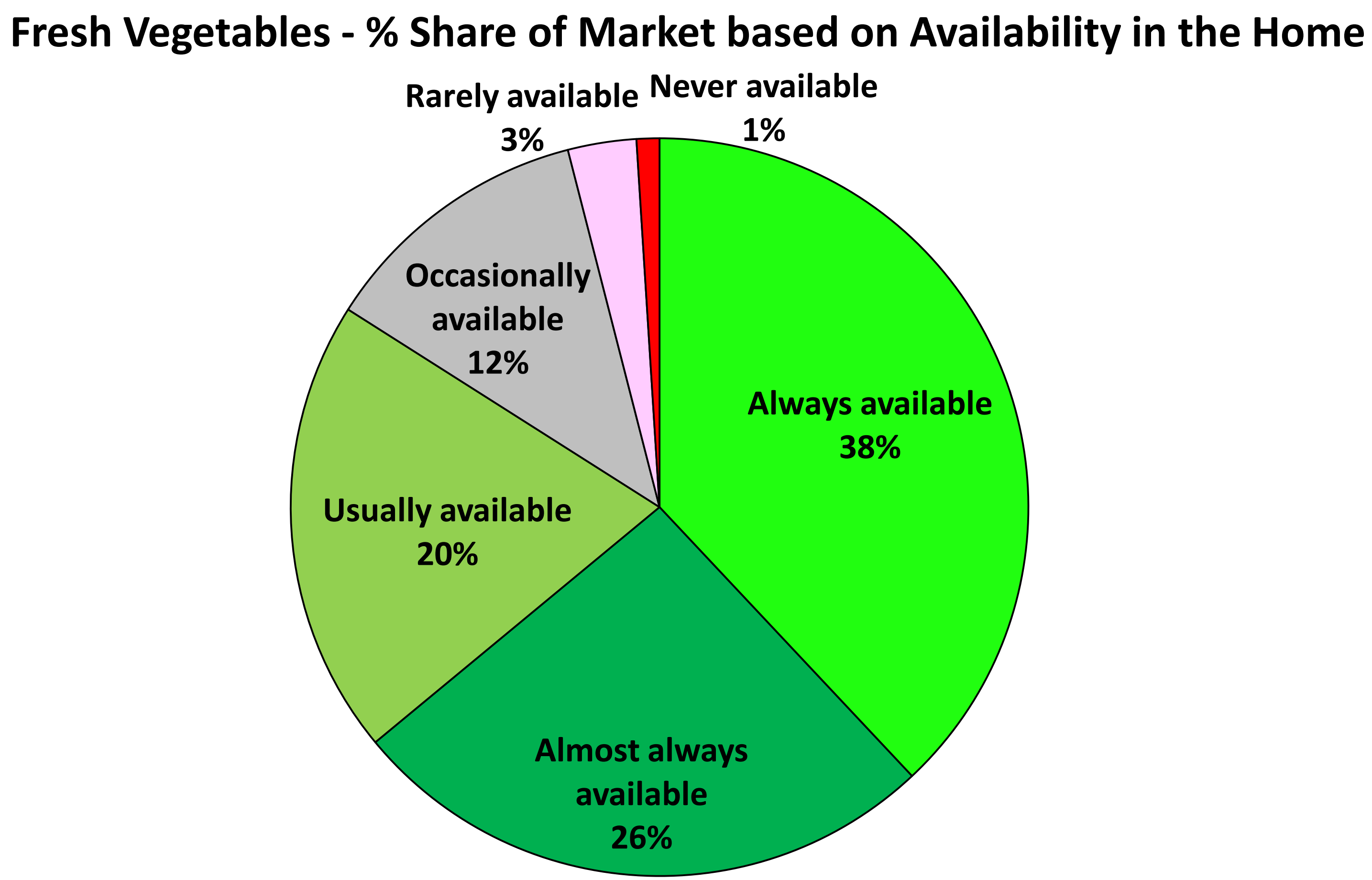
Summary of Key Findings and Observations

- 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 vegetables in the home

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



n=1,300

Cluster Drivers

➢ Cluster analysis revealed that 42 of the 81 independent variables tested significantly and differentiated segments with the consumer market regarding fresh vegetables. 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

- *Ethnicity, Age*
- *Consumption occasions*
- *Barriers to including fruits and vegetables in meals and snacks*
- *"Plate" recommendation regarding fruits and vegetables*
- *Satisfaction with daily eating habits regarding vegetables*

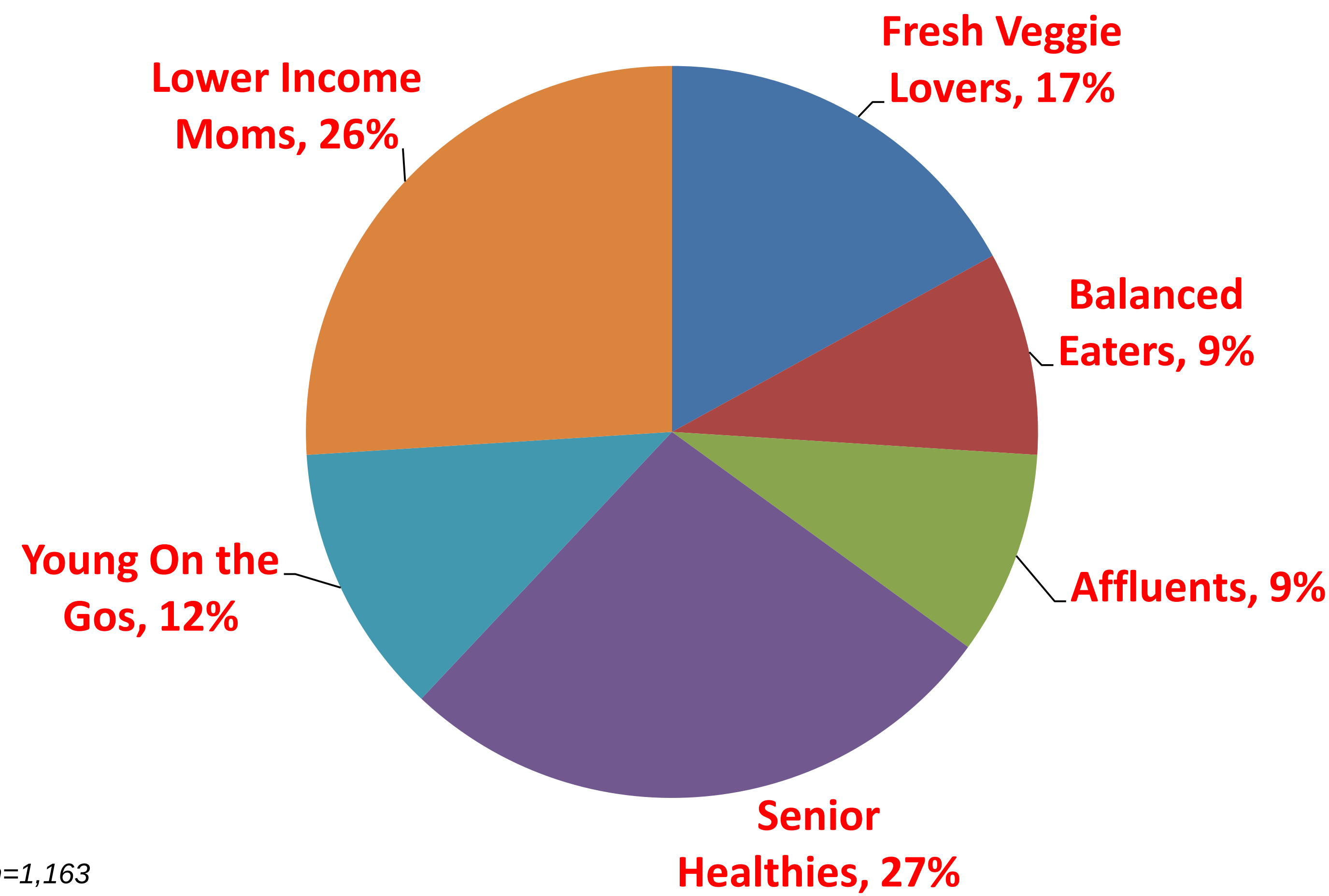
Secondary Cluster Drivers

- *Income, Work Status*
- *Daily consumption of all forms of vegetables*
- *Health benefits*
- *Motivations for eating vegetables*
- *Perceptions of healthiness regarding fresh vegetables*
- *Amount of time making the dinner meal*

Cluster analysis produced 6 clusters for fresh vegetables

- The size of the clusters range from 9% to 27%.

Fresh Vegetables – Distribution of Consumers by Cluster

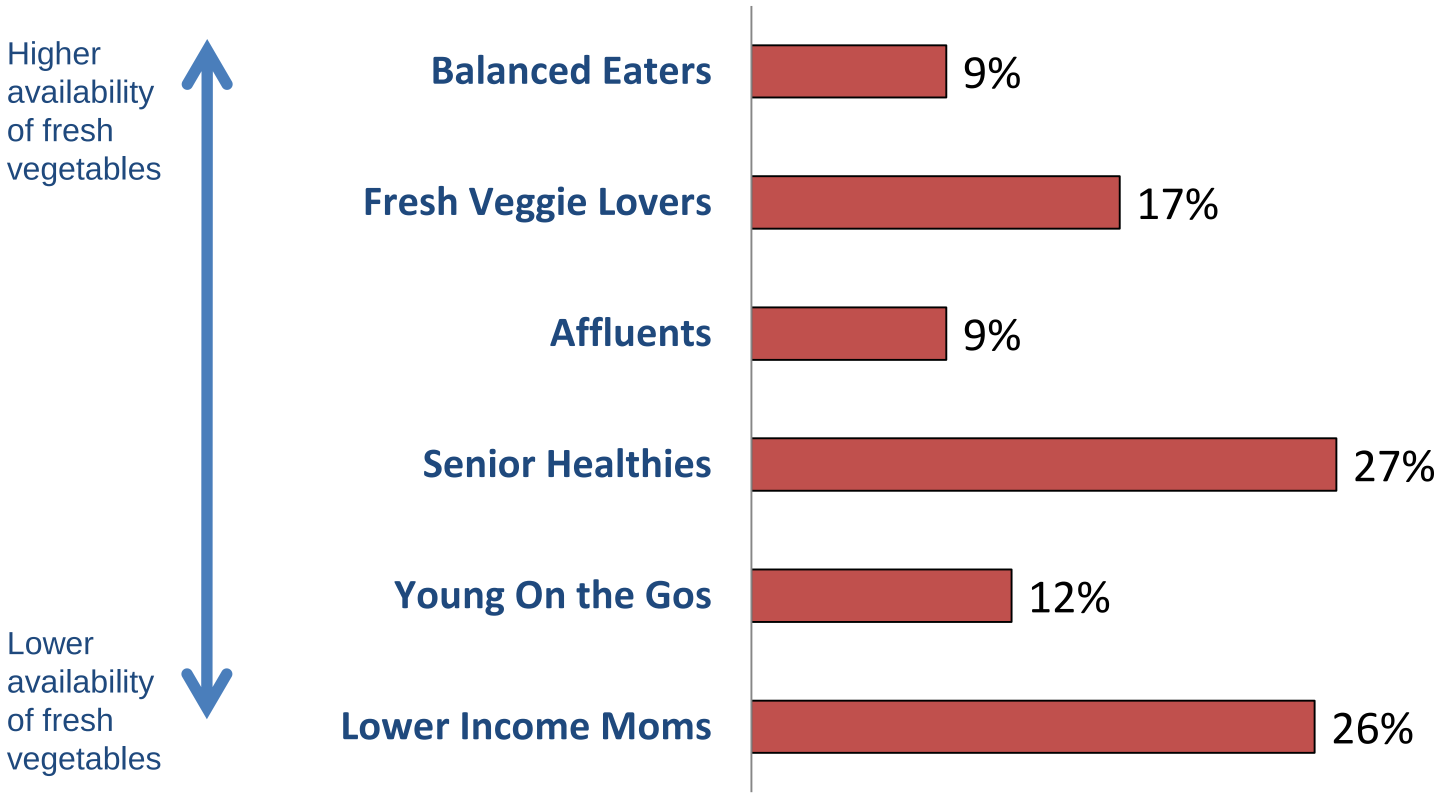


n=1,163

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

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

Ranked Order of Clusters by Availability of Fresh Vegetables in the Home



Cluster Profile:
“Balanced Eaters”

Profile Summary: *"Balanced Eaters"*

- The ***"Balanced Eaters"*** cluster represents consumers who are most likely to have fresh vegetables in their homes;
- They represent 9% of the total consumer market – the smallest segment;
- Compared to an average consumer, they are:
  - ***Less likely to be working outside the home;***
  - ***Less likely to be White/Caucasian.***

- They consume the second highest average daily cups of vegetables and are the most likely to believe that they and their families eat just enough vegetables;
- They spend the most amount of time making a dinner meal and are the most likely to eat fruits and vegetables because they like the taste and the least likely to lose weight;
- They are the least likely to complain about any barriers to including fruits and vegetables in meals and snacks.

Cluster 2 – *"Balanced Eaters"* (9% of the consumer market)

Always/Almost always has fresh vegetables available	**62% (vs. 38% for all); 21% almost always available (vs. 26% for all)**
Second highest daily consumption of cups of vegetables	*1.4 cups of vegetables per day (vs. 0.9 cups for all)*
Key Characteristics	
Less likely to be working outside the home, less likely to be White/Caucasian	*64% do not work outside the home (vs. 51% for all)* *68% are White/Caucasian (vs. 81% for all); 12% Black/African American (vs. 7%), 9% Hispanic (vs. 5% for all)*
Most likely to state that they and their families eat just enough vegetables	*67% state that they eat just enough vegetables (vs. 43% for all)*
Most likely to consume vegetables daily at the dinner table	*82% eat them daily (vs. 63% for all)*
Spend the most amount time making a dinner meal	*39 mins (vs. 37 mins for all)*
Most likely to personally eat fruits and vegetables because they like the taste and least likely to lose weight	*64% cited taste (vs. 51% for all)* *14% cited to lose weight (vs. 22% for all)*
Least likely to complain about any of the barriers to including fruits and vegetables in meals and snacks	*1% agree that vegetables are not appetizing (vs. 17% for all)* *8% agree that there is not a good range of fruits and vegetables available in restaurants (vs. 36% for all)* *0% agree that quality fruits and vegetables are not available in local stores (vs. 21% for all)* *0% agree that vegetables are time consuming to purchase and prepare (vs. 21% for all)* *8% agree that vegetables are too expensive (vs. 39% for all)* *15% agree that they need ideas about new ways to prepare fruits and vegetables (vs. 45% for all)* *1% agree that they forget to buy them (vs. 16% for all)* *1% agree that they go bad before they can eat them (vs. 36% for all)* *5% agree that they are enticed by other foods instead (vs. 37% for all)*

Key Purchase Behaviors: *"Balanced Eaters"*

- The key benefits of fresh vegetables for ***"Balanced Eaters"*** *are:*
  - *Healthy (94% citing this benefit),*
  - *I and/or my family likes them (70% citing this benefit),*
  - *Use in recipes (53% citing this benefit).*

- They buy their fresh vegetables weekly.
  - *Daily (7%)*
  - ***Weekly (79%)***
  - *Monthly (14%)*

- They are buying more compared to last year.
  - *17% buying more fresh vegetables in the past 3 months compared to 1 year earlier, 76% the same, 7% less*

- They waste less than average.
  - *39% do not throw any of their fresh vegetables out (vs. 23% for all)*

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

- They buy their fresh vegetables primarily at the grocery store.
  - *Grocery store (84%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (57%)*
  - *Farmer’s market or local fruit stand (31%)*
  - *Home garden (18%)*
  - *Club stores (BJ’s, Sam’s, Costco) (13%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 80% would at least scan a sign on a supermarket display and 89% a supermarket flyer/newspaper ad;*
  - *TV: 82% 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: 67% 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 (38% ranked it #1).*

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

- They are less familiar with the Fruits & Veggies – More Matters campaign…
  - *59% stated that they had never seen or heard about it (vs. 52% for all)*

- …and more likely to be motivated by it, including to buy.
  - *49% were motivated (vs. 35% for all)*
  - *49% 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 (40%),*
  - *TV (33%),*
  - *Ads (26%).*

Cluster Profile:
“Fresh Veggie Lovers”

Profile Summary: *"Fresh Veggie Lovers"*

- The ***"Fresh Veggie Lovers"*** cluster represents consumers who are the second most likely to have fresh vegetables in their homes;
- They represent 17% of the total consumer market;
- Compared to an average consumer, they are:
  - ***The most likely to work full-time outside the home;***
  - ***Earn the second highest average income.***
- They are the most likely to believe that consuming fruits and vegetables may be beneficial in preventing heart disease;
- They are the least likely to complain that different members of their family have different fruit and vegetables likes and dislikes.

Cluster 1 – *"Fresh Veggie Lovers"* (17% of the consumer market)

Always/Almost always has fresh vegetables available	**54% (vs. 38% for all); 25% almost always available (vs. 26% for all)**
Third highest daily consumption of cups of vegetables	*1.14 cups of vegetables per day (vs. 0.9 cups for all)*
Key Characteristics	
Most likely to work full-time outside the home, second highest income group	*57% work full-time outside the home (vs. 31% for all)* *40% earn $75k or more (vs. 28% for all)*
Most likely to believe that consuming fruits and vegetables may be beneficial for preventing heart disease	*76% believe this (vs. 69% for all)*
Least likely to complain that different members of their family have different fruit and vegetable likes and dislikes	*36% agree (vs. 50% for all)*

Key Purchase Behaviors: *"Fresh Veggie Lovers"*

- The key benefits of fresh vegetables for ***"Fresh Veggie Lovers"*** *are:*
  - *Healthy (90% citing this benefit),*
  - *Tastes good (82% citing this benefit),*
  - *I and/or my family likes them (75% citing this benefit).*

- They buy their fresh vegetables weekly.
  - *Daily (4%)*
  - ***Weekly (85%)***
  - *Monthly (10%)*

- They are buying more compared to last year.
  - *18% buying more fresh vegetables in the past 3 months compared to 1 year earlier, 79% the same, 3% less*

- They waste an average amount.
  - *22% do not throw any of their fresh vegetables out, compared to 22% for all.*

Key Purchase Behaviors: *"Fresh Veggie Lovers"* *(cont'd)*

- They buy their fresh vegetables primarily at the grocery store.
  - *Grocery store (91%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (59%)*
  - *Farmer's market or local fruit stand (40%)*
  - *Club stores (BJ's, Sam's, Costco) (26%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 88% would at least scan a sign on a supermarket display and 87% a supermarket flyer/newspaper ad;*
  - *TV: 83% would at least listen to a television commercial regarding a type of food that they might enjoy and 88% to a television news segment;*
  - *Online: 78% 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 (57% ranked it #1).*

Key Purchase Behaviors: *"Fresh Veggie Lovers"(cont'd)*

- They are a little more familiar with the Fruits & Veggies – More Matters campaign…
  - *46% stated that they had never seen or heard about it (vs. 52% for all)*

- …and more likely to be motivated by it, especially to buy.
  - *42% were motivated (vs. 35% for all)*
  - *54% 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 (37%),*
  - *Food package (29%),*
  - *Magazines (28%).*

Cluster Profile:
“Affluents”

Profile Summary: *“Affluents”*

- The ***“Affluents”*** cluster represents consumers who are the third most likely to have fresh vegetables in their homes;
- They represent 9% of the total consumer market;
- Compared to an average consumer, they:
  - ***Have the highest income;***
  - ***Are the least likely to be White/Caucasian.***
- They are the most likely to cite healthy as an important factor when shopping for fruits and vegetables;
- They are also the most likely to complain about the barriers to including fruits and vegetables in meals and snacks.

Cluster 3 – *"Affluents"* (9% of the consumer market)

Always/Almost always has fresh vegetables available	**52% (vs. 38% for all); 26% almost always available (vs. 26% for all)**
Highest daily consumption of cups of vegetables	*1.5 cups of vegetables per day (vs. 0.9 cups for all)*
Key Characteristics	
Highest income, least likely to be White/Caucasian	*27% earn $100k or more (vs. 14% for all)* *57% are White/Caucasian (vs. 81% for all); 13% Black/African American (vs. 7% for all), 18% Asian/Pacific Islander (vs. 5% for all)*
Least likely to rank family preferences, taste and part of a balanced diet in their top 3 factors when shopping for fruits and vegetables and most likely to cite healthy	*22% ranked family preferences n their top 3 (vs. 34% for all)* *33% ranked "like the taste" in their top 3 (vs. 51% for all)* *39% ranked "part of a balanced diet" (vs. 56% for all)* *52% ranked healthy (vs. 33% for all)*
Least likely to consider fresh fruits and vegetables as healthy	*71% strongly agree (vs. 87% for all)*
Most likely to eat vegetables daily in front of the TV, at their office desk, in the work cafeteria, in a restaurant and at events	*43% eat them daily in front of the TV (vs. 20% for all)* *30% eat them daily at their office desk (vs.7% for all)* *31% eat them daily in the work cafeteria (vs. 7% for all)* *31% eat it daily in a restaurant (vs. 5% for all)* *21% eat them daily at events (vs. 5% for all)*
Least likely to believe that the vitamins and antioxidants in fruits and vegetables may provide health benefits	*78% believe in vitamins (vs. 90% for all)* *63% in antioxidants (vs. 80% for all)*
Most likely to complain about the barriers to including fruits and vegetables in meals and snacks	*73% agree that members of their family have different fruit and vegetable likes and dislikes (vs. 50% for all); 49% agree that vegetables are not appetizing (vs. 17% for all); 57% agree that there is not a good range of fruits and vegetables available in restaurants (vs. 36% for all); 53% agree that quality fruits and vegetables are not available in local stores (vs. 21% for all); 68% agree that vegetables are time consuming to purchase and prepare (vs. 21% for all)* *69% agree that vegetables are too expensive (vs. 39% for all)* *41% agree that they forget to buy them (vs. 16% for all)* *57% agree that they go bad before they can eat them (vs. 36% for all)*

Key Purchase Behaviors: *"Affluents"*

- The key benefits of fresh vegetables for ***"Affluents"*** *are:*
  - *Healthy (93% citing this benefit),*
  - *Tastes good (74% citing this benefit),*
  - *I and/or my family likes them (59% citing this benefit).*
- They buy their fresh vegetables weekly.
  - *Daily (15%)*
  - ***Weekly (74%)***
  - *Monthly (11%)*
- They are buying much more compared to last year.
  - *41% buying more fresh vegetables in the past 3 months compared to 1 year earlier, 59% the same, 0% less*
- They waste a little less than average.
  - *26% do not throw any of their fresh vegetables out (vs. 23% for all)*

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

- They buy their fresh vegetables primarily at a grocery store.
  - *Grocery store (90%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (56%)*
  - *Club stores (BJ's, Sam's, Costco) (17%)*

- Intercept them in the supermarket, on TV or the radio, on social media and online:
  - *Supermarket: 87% would at least scan a sign on a supermarket display and 90% 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 87% 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 (45% ranked it #1).*

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

- They are a little less familiar with the Fruits & Veggies – More Matters campaign…
  - *56% stated that they had never seen or heard about it (vs. 52% for all)*

- …and a little less likely to be motivated by it, but slightly more likely to buy.
  - *32% 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 (38%),*
  - *TV (26%),*
  - *Magazines (25%).*

Cluster Profile:
“Senior Healthies”

Profile Summary: *"Senior Healthies"*

- The ***"Senior Healthies"*** cluster represents consumers who are the third least likely to have fresh vegetables in their homes;
- They represent 27% of the total consumer market – the largest segment;
- Compared to an average consumer, they are:
  - ***The oldest;***
  - ***Most likely to work outside the home;***
  - ***Most likely to be White/Caucasian.***
- Least likely to rate taste as an important factor when shopping for fruits and vegetables and most likely to rank balanced diet and locally grown.
- Most likely to consider fresh fruits and vegetables as healthy.

Cluster 4 - *"Senior Healthies"* (27% of the consumer market)

Always/Almost always has fresh vegetables available	**42% (vs. 38% for all); 32% almost always available (vs. 26% for all)**
Fourth highest daily consumption of cups of vegetables	*1.3 cups of vegetables per day (vs. 0.9 cups for all)*
Key Characteristics	
Oldest, most likely to working outside home, most likely to be White/Caucasian	*Average age is 52 (vs.45 for all)* *75% work outside the home (vs. 51% for all)* *87% are White/Caucasian (vs. 81% for all)* *15% completed graduate work (vs. 10% for all)* *54% work full-time (vs. 31% for all)*
Most likely to believe that the vitamins and antioxidants in fruits and vegetables may provide health benefits	*94% believe in vitamins (vs. 90% for all)* *88% in antioxidants (vs. 80% for all)*
Most likely to rank part of a balanced diet and locally grown in their top 3 factors when shopping for fruits and vegetables and least likely to rank taste	*66% ranked "part of a balanced diet" (vs. 56% for all)* *23% ranked "locally grown" (vs. 14% for all)* *52% ranked taste (vs. 60% for all)*
Most likely to consider fresh fruits and vegetables as healthy	*93% strongly agree (vs. 87% for all)*

Key Purchase Behaviors: *"Senior Healthies"*

- The key benefits of fresh vegetables for ***"Senior Healthies"*** *are:*
  - *Healthy (94% citing this benefit),*
  - *Tastes good (81% citing this benefit),*
  - *I and/or my family likes them (77% citing this benefit).*

- They buy their fresh vegetables weekly.
  - *Daily (3%)*
  - **Weekly (83%)**
  - *Monthly (13%)*

- They are buying more compared to last year.
  - *20% buying more fresh vegetables in the past 3 months compared to 1 year earlier, 72% the same, 8% less*

- They waste an average amount.
  - *20% do not throw any of their fresh vegetables out (vs. 23% for all)*

Key Purchase Behaviors: "*Senior Healthies*"*(cont'd)*

- They buy their fresh vegetables primarily at the grocery store.
  - *Grocery store (91%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (54%)*
  - *Club stores (BJ's, Sam's, Costco) (19%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 89% would at least scan a sign on a supermarket display and 91% 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 87% to a television news segment;*
  - *Online:76% 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: *"Senior Healthies"* *(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. 52% for all)*

- …but are less motivated by it though slightly more likely to buy.
  - *28% 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 (48%),*
  - *TV (29%),*
  - *Magazines (22%).*

Cluster Profile:
"Young On the Gos"

Profile Summary: *“Young On the Gos”*

- The ***“Young On the Gos”*** cluster represents consumers who are the second least likely to have fresh vegetables in their homes;
- They represent 12% of the total consumer market;
- Compared to an average consumer, they are:
  - ***The youngest.***

- They are the most likely to feel they/their families eat too little vegetables;
- Most likely to need ideas about new ways to prepare fruits and vegetables;
- Most likely to cite taste as an important factor when shopping for fruits and vegetables;
- They spend the least amount of time preparing a dinner meal and are the most likely to be enticed by other foods.

Cluster 5 – *"Young On the Gos"* (12% of the consumer market)

Always/Almost always has fresh vegetables available	**17% (vs. 38% for all); 29% almost always available (vs. 81% for all)**
Second lowest daily consumption of cups of vegetables	*0.4 cups of vegetables per day (vs. 0.9 cups for all)*
Key Characteristics	
Youngest	*Average age is 35 (vs.45 for all)*
Most likely to feel they /their family eat too little vegetables	*72% agree (vs. 54% for all)*
Most likely to need ideas about new ways to prepare fruits and vegetables	*79% believe they need new ideas (vs. 45% for all)*
Most likely to correctly state that 50% of their plate is recommended to be made up of fruits and vegetables	*57% stated 50% (vs. 39% for all)*
Most likely to cite "taste" as a top 3 factor when shopping for fruits and vegetables	*77% cite taste in their top 3 (vs. 60% for all)*
Least likely to eat vegetables daily at the dinner table	*36% eat them daily at the dinner table (vs. 63% for all)*
Spend the least amount of time making a dinner meal	*Spend an average of 30 mins. (vs.37 mins for all)*
Most likely to cite "to lose weight" as one of the 3 most important reasons for personally eating fruits and vegetables	*38% cite losing weight (vs.22% for all)*
Most likely to be enticed by other foods	*71% enticed by other foods (vs. 16% for all)*

Key Purchase Behaviors: *"Young On the Gos"*

- The key benefits of fresh vegetables for ***"Young On the Gos"*** *are:*
  - *Healthy (85% citing this benefit),*
  - *Tastes good (70% citing this benefit),*
  - *Use in recipes (49% citing this benefit).*

- They buy their fresh vegetables weekly.
  - *Daily (1%)*
  - **Weekly (73%)**
  - *Monthly (21%)*

- They are buying more compared to last year.
  - *24% buying more fresh vegetables in the past 3 months compared to 1 year earlier, 62% the same, 14% less*

- They waste more than average.
  - *4% do not throw any of their fresh vegetables out (vs. 23% for all)*

Key Purchase Behaviors: *"Young On the Gos"* *(cont'd)*

- They buy their fresh vegetables primarily at the grocery store.
  - *Grocery store (90%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (68%)*
  - *Farmer's market or local fruit stand (24%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 75% would at least scan a sign on a supermarket display and 82% 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 79% to a television news segment;*
  - *Online: 84% 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 (53% ranked it #1).*

Key Purchase Behaviors: *"Young On the Gos"(cont'd)*

- They have average familiarity with the Fruits & Veggies – More Matters campaign…
  - *50% stated that they had never seen or heard about it (vs. 52% for all)*

- …but are less likely to be motivated by it or to buy because of it.
  - *27% were motivated (vs. 35% for all)*
  - *35% 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 (33%),*
  - *Supermarket display (33%),*
  - *Magazines (23%).*

Cluster Profile:
"Lower Income Moms"

Profile Summary: *"Lower Income Moms"*

- The ***"Lower Income Moms"*** cluster represents consumers who are the least likely to have fresh vegetables in their homes;
- They represent 26% of the total consumer market – the second largest segment;
- Compared to an average consumer, they:
  - ***Have the lowest incomes.***
- They are the most likely to cite family preferences as an important factor when shopping for fruits and vegetables;
- They are the least likely to cite healthy.

Cluster 6 – *"Lower Income Moms"* (26% of the consumer market)

Always/Almost always has fresh vegetables available	**18% (vs. 38% for all); 23% almost always available (vs. 81% for all)**
Lowest daily consumption of cups of vegetables	*0.43 cups of vegetables per day (vs. 0.9 cups for all)*
<u>Key Characteristics</u>	
Lowest income	*59% earn less than $50k (vs. 47% for all)*
Most likely to cite "family preferences" as a top 3 factor when shopping for fruits and vegetables; least likely to cite "healthy"	*50% cite family preferences in their top 3 (vs. 34% for all)* *16% cite healthy (vs. 33% for all)*

Key Purchase Behaviors: *"Lower Income Moms"*

- The key benefits of fresh vegetables for ***"Lower Income Moms"*** *are:*
  - *Healthy (84% citing this benefit),*
  - *Tastes good (71% citing this benefit),*
  - *I/my family likes them (64% citing this benefit).*

- They buy their fresh vegetables weekly.
  - *Daily (1%)*
  - **Weekly (69%)**
  - *Monthly (26%)*

- They are buying more compared to last year.
  - *20% buying more fresh vegetables in the past 3 months compared to 1 year earlier, 74% the same, 7% less*

- They waste an average amount.
  - *22% do not throw any of their fresh vegetables out (vs. 23% for all)*

Key Purchase Behaviors: *"Lower Income Moms"* *(cont'd)*

- They buy their fresh vegetables primarily at the grocery store.
  - *Grocery store (90%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (53%)*
  - *Farmer's market or local fruit stand (21%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 79% would at least scan a sign on a supermarket display and 82% 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 80% to a television news segment;*
  - *Online: 70% 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 (49% ranked it #1).*

Key Purchase Behaviors: *"Lower Income Moms"* *(cont'd)*

- They are less familiar with the Fruits & Veggies – More Matters campaign…
  - *62% stated that they had never seen or heard about it (vs. 52% for all)*

- …are are less likely to be motivated by it or to buy because of it.
  - *26% were motivated (vs. 35% for all)*
  - *29% 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 (44%),*
  - *TV (32%),*
  - *Magazines (22%).*