Research conducted by:

ON Research

On behalf of:

PRODUCE FOR BETTER HEALTH FOUNDATION:

PBH Foundation - Cluster Analysis

2012 Report: 100% Fruit Juice

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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

- 100% fruit juice is extremely popular.
  - *Only 2% of consumers never have fruit juice available in their homes and more than one in three (37%)* ***always*** *have it available*

- Five (5) clusters define the fruit juice consumer market, and the size of these clusters varies from 9% to 25% *[ranked below in order of availability of fruit juice, from highest to lowest].*
  1. *"Young Healthy Juicers" (9% of total consumer market)*
  2. *"Armchair Homeopaths" (22% of total consumer market)*
  3. *"Senior Fruit Lovers" (25% of total consumer market)*
  4. *"Stingy Moms" (23% of total consumer market)*
  5. *"Guilty Junk Foodies" (21% 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:
  - *Work status,*
  - *Education,*
  - *Income,*
  - *Age,*
  - *Parental status.*

- The consumption of fruit juice is somewhat correlated to the consumption of fruit in general, and the key benefits of the fruit juice form are its taste, family preference and perceived healthiness.

- Notably, all segments self-reported increasing their consumption of fruit juice this year compared to last, including those who are the most price sensitive and those with the lowest current consumption of fruit juice.

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 fruit juice are weekly, frequency will be critical.

- In terms of reach, certain clusters may represent especially attractive targets:
  - *"Stingy Moms"* (consume the second highest daily number of cups of fruit but are the second least likely to have fruit juice available, highest income but most price sensitive regarding fruit in general, most likely to cite members of their family have different likes and dislikes, and most likely to be concerned about spoilage);
  - *"Senior Fruit Lovers"* (largest segment, most likely to find fruit appetizing and to eat fruits and vegetables to stay healthy);
  - *"Guilty Junk Foodies"* (lowest consumption, and most guilty).

Summary of Key Findings and Observations

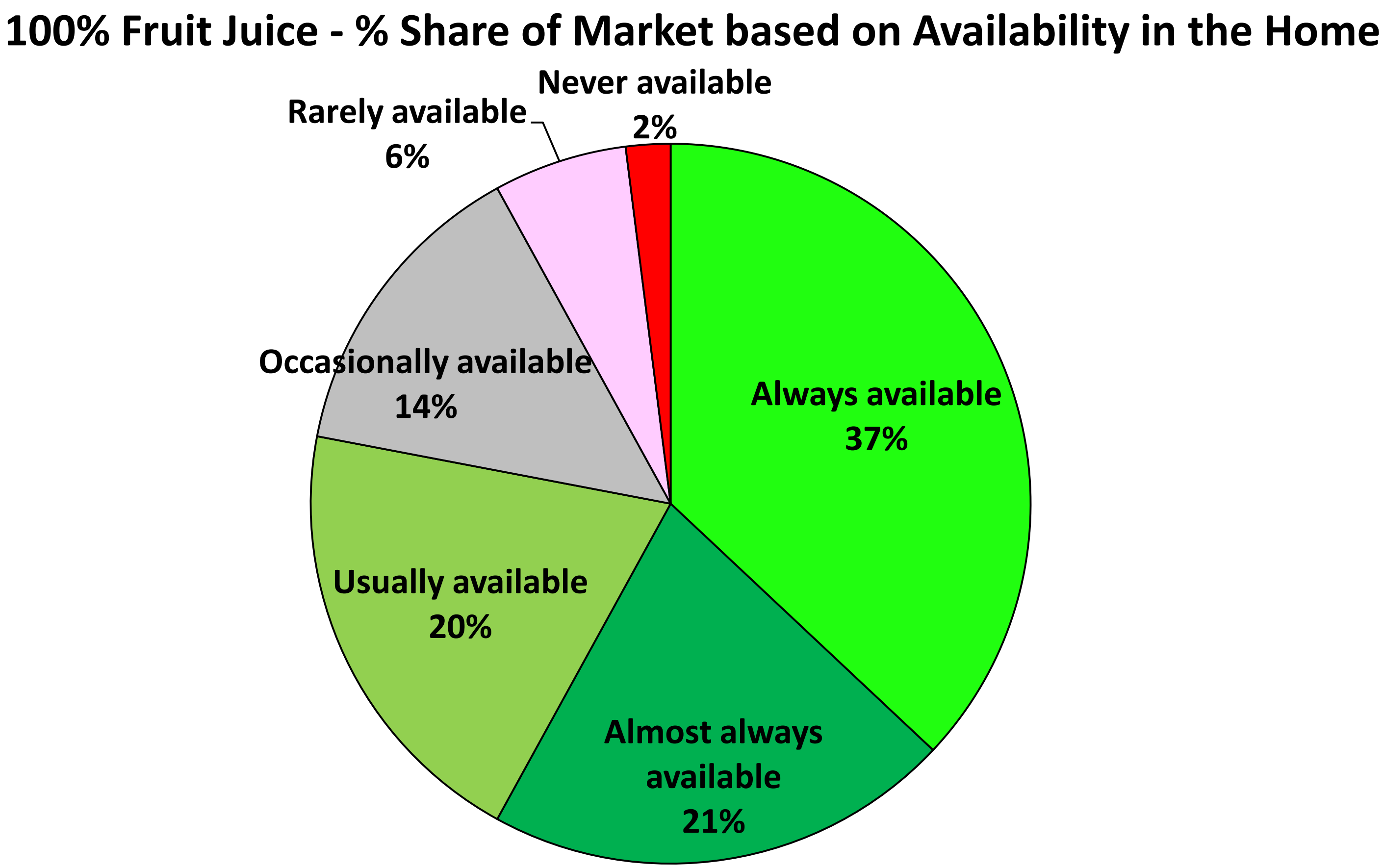
- Increased visibility of the Fruits & Veggies – More Matters campaign may help stimulate demand.
    - *"Senior Fruit Lovers" are less familiar with the campaign but are a little more likely to buy after exposure to the campaign*

- 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 100% fruit juice in the home

- Only 2% of consumers never have fruit juice available in their homes.



n=1,300

Cluster Drivers

- Cluster analysis revealed that 36 of the 81 independent variables tested significantly and differentiated segments with the consumer market regarding fruit juice. 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

- *Work status, Age;*
- *Consumption occasions;*
- *Barriers to including fruits and vegetables in meals and snacks.*

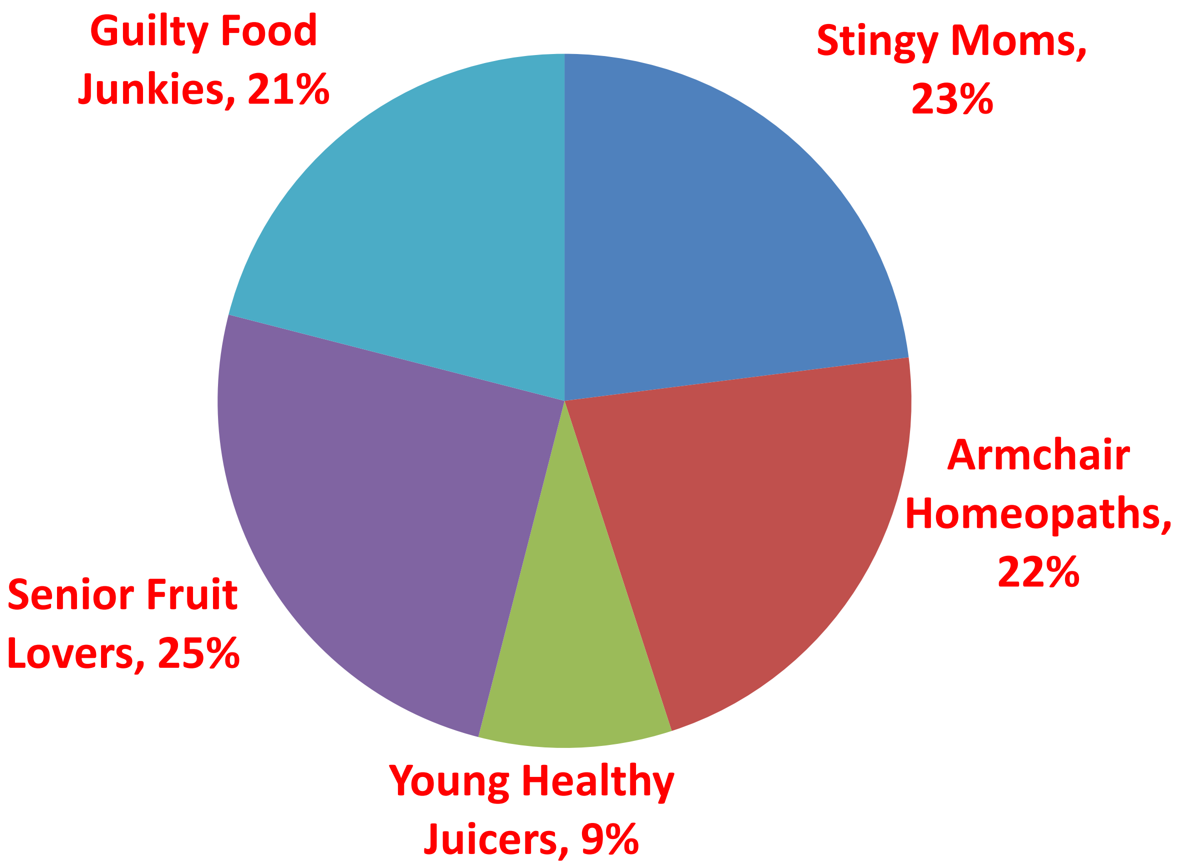
Secondary Cluster Drivers

- *Income, Parental status, Education, Ethnicity;*
- *Daily consumption of all forms of fruit;*
- *Satisfaction with daily eating habits regarding fruit;*
- *Health benefits;*
- *Motivations for eating fruits.*

Cluster analysis produced 5 clusters for fruit juice

- The size of the clusters range from 9% to 25%.

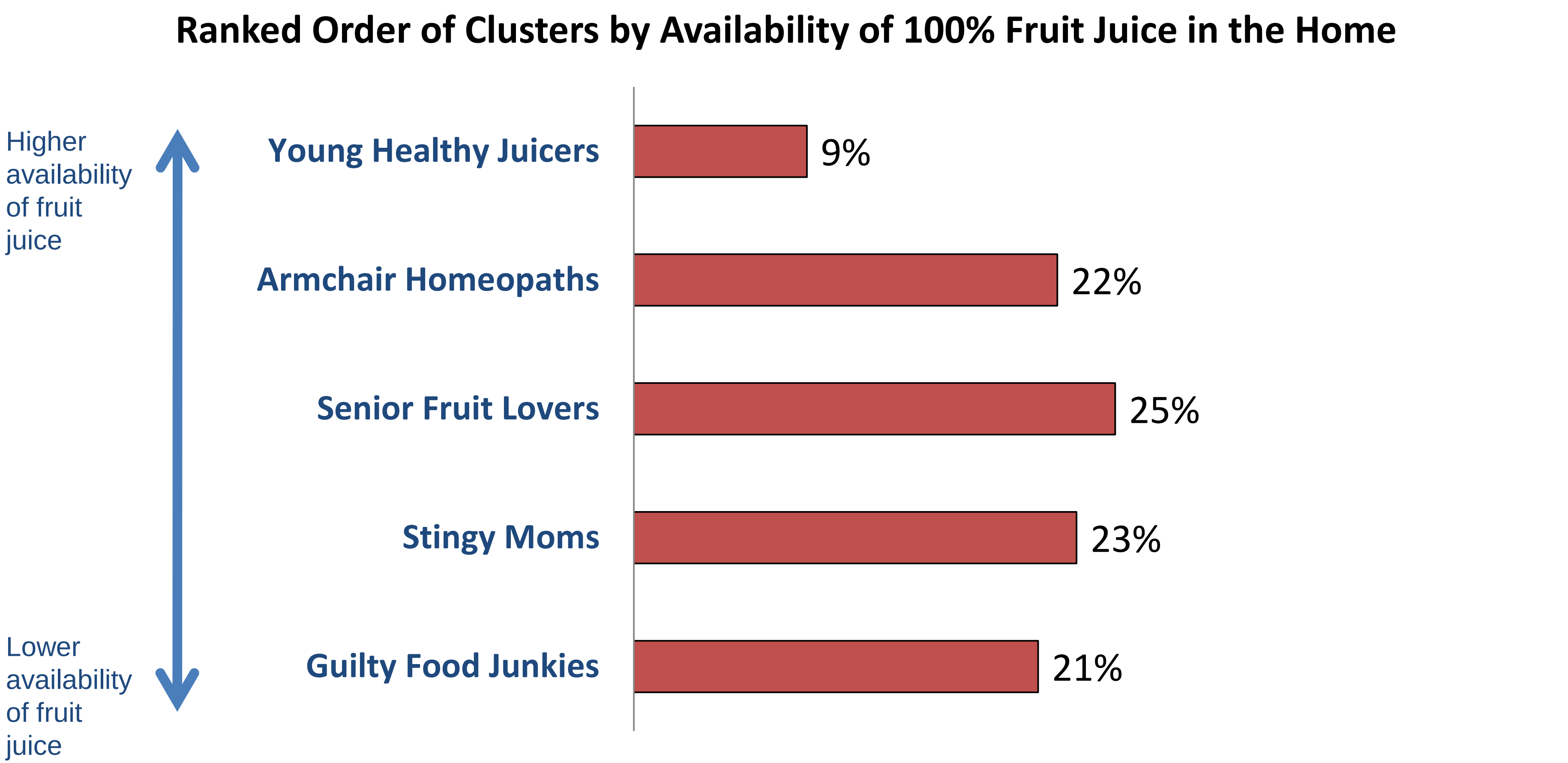
100% Fruit Juice – Distribution of Consumers by Cluster



n=1,163

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

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



Cluster Profile:
“Young Healthy Juicers”

Profile Summary: *“Young Healthy Juicers”*

- The ***“Young Healthy Juicers”*** cluster represents consumers who are most likely to have fruit juice in their homes;
- They represent 9% of the total consumer market – the smallest segment;
- Compared to an average consumer, they are:
  - ***The youngest;***
  - ***Least likely to be White/Caucasian.***

- They consume the highest average daily cups of fruit and are the most likely to believe that they and their families east just enough fruit;
- The least price sensitive, they are the most likely to shop for fruits and vegetables based on health.

Cluster 3 – *"Young Healthy Juicers"* (9% of the consumer market)

Always/Almost always has fruit juice available	**55% (vs. 37% for all); 19% almost always available (vs. 21% for all)**
Highest daily consumption of cups of fruit	*1.8 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Youngest, least likely to be White/Caucasian	*Average age is 35 (vs. 45 for all)* *70% White/Caucasian (vs. 81% for all), 9% Asian/Pacific Islander (vs. 5% for all), 9% Black/African-American (vs. 5% for all), 8% Hispanic/Latino (vs. 5% for all)*
Most likely to believe that they and their families eat just enough fruit (and 3 times as likely to believe they eat too much)	*65% believe they eat just enough (vs. 41% for all)* *10% believe they eat too much (vs. 3% for all)*
Least likely to cite "taste" as being important when shopping for fruits and vegetables but most likely to cite "healthy"	*48% cited taste (vs. 60% for all)* *45% cited healthy (vs. 33% for all)*
Least price sensitive	*22% agree that fruit is too expensive (vs. 48% for all)*
Most likely to eat fruit daily at the dinner table, in front of the TV, at work, in the car, in a restaurant and at events	*63% eat fruit daily at the dinner table (vs. 36% for all)* *42% in front of the TV (vs. 25% for all)* *24% in work cafeteria (vs. 6% for all)* *37% at office desk (vs. 13% for all)* *20% in their car (vs. 5% for all)* *11% in a restaurant (vs. 4% for all)* *25% at events (vs. 6% for all)*
Least likely to complain that fruits and vegetables go bad before they can eat them, that they are tempted by other foods and that members of their families have different fruit and vegetable likes and dislikes	*15% cited spoilage (vs. 36% for all)* *12% enticed by other foods (vs. 37% for all)* *20% cited members of their family have different likes/dislikes (vs. 50% for all)*

Key Purchase Behaviors: *"Young Healthy Juicers"*

- The key benefits of fruit juice for ***"Young Healthy Juicers"*** *are:*
  - *Healthy (76% citing this benefit),*
  - *Tastes good (63% citing this benefit),*
  - *I and/or my family likes them (63% citing this benefit).*

- They buy their fruit juice weekly.
  - *Daily (9%)*
  - ***Weekly (57%)***
  - *Monthly (35%)*

- They are buying more compared to last year.
  - *20% buying more fruit juice in the past 3 months compared to 1 year earlier, 72% the same, 9% less*

- They waste more than average.
  - *72% do not throw any of their fruit juice out (vs. 84% for all)*

Key Purchase Behaviors: *"Young Healthy Juicers"(cont'd)*

- They buy their fruit juice primarily at the grocery store.
  - *Grocery store (94%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (57%)*
  - *Club stores (BJ's, Sam's, Costco) (26%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 92% would at least scan a sign on a supermarket display and 88% 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 85% to a television news segment;*
  - *Online: 72% 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 (50% ranked it #1).*

Key Purchase Behaviors: *"Young Healthy Juicers"(cont'd)*

- They are more familiar with the Fruits & Veggies – More Matters campaign…
  - *41% 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.
  - *51% were motivated (vs. 35% for all)*
  - *64% 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%),*
  - *Ads (33%),*
  - *TV (28%).*

Cluster Profile:
"Armchair Homeopaths"

Profile Summary: *"Armchair Homeopaths"*

- The ***"Armchair Homeopaths"*** cluster represents consumers who are the second most likely to have fruit juice in their homes;
- They represent 22% of the total consumer market;
- Compared to an average consumer, they are:
  - ***The least likely to work outside the home;***
  - ***Slightly more likely to have a child under 18 living at home.***
- They consume the third highest average daily cups of fruit and are most likely to need ideas about new ways to prepare fruits and vegetables;
- They are particularly distinguished by the fact that they are the most likely to associate fruits and vegetables as being beneficial in preventing many different medical conditions (heart disease, diabetes, cancer and obesity), as well believe that the antioxidants in fruits and vegetables provide health benefits;
- They complain that there is not a good range of fruits and vegetables in restaurants and that quality fruits and vegetables are not available in local stores.

Cluster 2 – *"Armchair Homeopaths"* (22% of the consumer market)

Always/Almost always has fruit juice available	**41% (vs. 37% for all); 28% almost always available (vs. 21% for all)**
Third highest daily consumption of cups of fruit	*1.1 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Least likely to work outside the home, slightly more likely to have a child under 18 living at home	*72% do not work outside the home (vs. 51% for all)* *79% have a child under 18 living at home (vs. 71% for all)*
Most likely to shop for fruits and vegetables based on "taste"	*71% ranked "taste" in their top 3 (vs. 60% for all)*
Most likely to believe that consuming fruits and vegetables may be beneficial for preventing heart disease, overweight/obesity, diabetes, and cancer	*82% identified heart disease (vs. 69% for all)* *81% identified overweight and obesity (vs. 72% for all)* *66% identified diabetes (vs. 56% for all)* *58% identified cancer (vs. 47% for all)*
Most likely to believe that antioxidants in fruits and vegetables may provide health benefits	*90% cited antioxidants (vs. 80% for all)*
Most likely to agree that there is not a good range of fruits and vegetables available in restaurants and that quality fruits and vegetables are not available in local stores	*50% agree regarding restaurants (vs. 32% for all)* *29% agree regarding local stores (vs. 21% for all)*
Most likely to need ideas about new ways to prepare fruits and vegetables	*62% agree (vs. 45% for all)*

Key Purchase Behaviors: *"Armchair Homeopaths"*

- The key benefits of fruit juice for ***"Armchair Homeopaths"*** *are:*
  - *Tastes good (83% citing this benefit),*
  - *I and/or my family likes them (79% citing this benefit),*
  - *Healthy (76% citing this benefit).*

- They buy their fruit juice weekly.
  - *Daily (4%)*
  - ***Weekly (58%)***
  - *Monthly (34%)*

- They are buying more compared to last year.
  - *20% buying more fruit juice in the past 3 months compared to 1 year earlier, 68% the same, 12% less*

- They waste an average amount.
  - *81% do not throw any of their fruit juice out, compared to 84% for all.*

Key Purchase Behaviors: *"Armchair Homeopaths"(cont'd)*

- They buy their fruit juice primarily at the grocery store.
  - *Grocery store (85%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (70%)*
  - *Club stores (BJ's, Sam's, Costco) (18%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 85% would at least scan a sign on a supermarket display and 90% 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 86% 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 (50% ranked it #1).*

Key Purchase Behaviors: *"Armchair Homeopaths"(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)*
- …but a little less likely to be motivated by it, though equally likely to buy.
  - *30% were motivated (vs. 35% for all)*
  - *44% 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%),*
  - *TV (29%),*
  - *Magazines (23%).*

Cluster Profile:
“Senior Fruit Lovers”

Profile Summary: *“Senior Fruit Lovers”*

- The ***“Senior Fruit Lovers”*** cluster represents consumers who are the third most likely to have fruit juice in their homes;
- They represent 25% of the total consumer market – the largest segment;
- Compared to an average consumer, they are:
  - ***The oldest;***
  - ***Least likely to have a child under 18 living at home.***

- They are the most likely to find fruit appetizing and to disagree that fruit is time consuming to purchase and prepare;
- They are the least likely to forget to buy fruits and vegetables and the most likely to eat fruits and vegetables to stay healthy.

Cluster 4 – *"Senior Fruit Lovers"* (25% of the consumer market)

Always/Almost always has fruit juice available	**41% (vs. 37% for all); 19% almost always available (vs. 21% for all)**
Third highest daily consumption of cups of fruit	*1.1 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Oldest, least likely to have a child under 18 living at home	*Average age is 53 (vs. 45 for all)* *59% have a child under 18 living at home (vs. 71% for all)*
Most likely to indicate they don't know what portion of their "plate" is recommended to be made up of fruits and vegetables	*33% indicated "don't know/not sure" (vs. 22% for all)*
Most likely to disagree that there is not a good range of fruits and vegetables available in restaurants or that quality fruits and vegetables are not available in local stores	*57% disagree regarding restaurants (vs.35% for all)* *75% disagree regarding local stores (vs. 52% for all)*
Most likely to find fruit appetizing and to disagree that fruit is time consuming to purchase and prepare or that they forget to buy them	*97% disagree that fruit is not appetizing (vs. 63% for all)* *84% disagree that it is time consuming (vs. 60% for all)* *1% agreed that they forget to buy them (vs. 16% for all)*
Most likely to cite "to stay healthy" as one of the 3 most important reasons they themselves eat fruits and vegetables	*86% identified to stay healthy (vs. 79% for all)*

Key Purchase Behaviors: *"Senior Fruit Lovers"*

- The key benefits of fruit juice for ***"Senior Fruit Lovers"*** *are:*
  - *I and/or my family likes them (79% citing this benefit),*
  - *Tastes good (78% citing this benefit),*
  - *Healthy (68% citing this benefit).*

- They buy their fruit juice weekly.
  - *Daily (3%)*
  - ***Weekly (53%)***
  - *Monthly (36%)*

- They are buying a bit more compared to last year.
  - *11% buying more fruit juice in the past 3 months compared to 1 year earlier, 80% the same, 9% less*

- They waste the least.
  - *90% do not throw any of their fruit juice out (vs. 84% for all)*

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

- They buy their fruit juice 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: *"Senior Fruit Lovers"(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:
"Stingy Moms"

Profile Summary: *“Stingy Moms”*

- The ***“Stingy Moms”*** cluster represents consumers who are the second least likely to have fruit juice in their homes;
- They represent 23% of the total consumer market;
- Compared to an average consumer, they are:
  - ***Most likely to have a child under 18 living at home;***
  - ***Have the highest income and be the most educated;***
  - ***Most likely to be working full-time outside the home.***
- While earning the most income of all segments, they are the most price sensitive when it comes to buying fruit;
- They are also the most likely to be challenged with members of their families having different fruits and vegetables likes and dislikes.

Cluster 1 - *"Stingy Moms"* (23% of the consumer market)

Always/Almost always has fruit juice available	**37% (vs. 37% for all); 22% almost always available (vs. 21% for all)**
Second highest daily consumption of cups of fruit	*1.2 cups of fruit per day (vs. 0.8 cups for all)*
<u>Key Characteristics</u>	
Most likely to have a child under 18 living at home, highest income and most educated, most likely to be working full-time	*81% have a child living at home (vs. 71% for all)* *23% have a household income >$100k (vs. 14% for all)* *15% completed graduate work (vs. 10% for all)* *54% work full-time (vs. 31%for all)*
Most likely to cite "members of my family have different fruits and vegetables likes and dislikes"	*59% agree (vs. 50% for all)*
Most price sensitive	*61% agree that fruit is too expensive (vs. 48% for all)*
Most likely to agree that fruits and vegetables go bad before they can eat them	*47% agree (vs. 36% for all)*

Key Purchase Behaviors: *"Stingy Moms"*

- The key benefits of fruit juice for ***"Stingy Moms"*** *are:*
  - *Tastes good (73% citing this benefit),*
  - *I and/or my family likes them (71% citing this benefit),*
  - *Healthy (67% citing this benefit).*

- They buy their fruit juice weekly.
  - *Daily (5%)*
  - **Weekly (60%)**
  - *Monthly (30%)*

- They are buying more compared to last year.
  - *16% buying more fruit juice in the past 3 months compared to 1 year earlier, 74% the same, 10% less*

- They waste a little less than average.
  - *86% do not throw any of their fruit juice out (vs. 84% for all)*

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

- They buy their fruit juice primarily at the grocery store.
  - *Grocery store (83%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (69%)*
  - *Club stores (BJ's, Sam's, Costco) (25%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 81% would at least scan a sign on a supermarket display and 84% 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 86% to a television news segment;*
  - *Online:80% 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 (54% ranked it #1).*

Key Purchase Behaviors: *"Stingy Moms"(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)*

- …and have average motivation.
  - *34% were motivated (vs. 35% for all)*
  - *40% 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 (33%),*
  - *Food package (28%).*

Cluster Profile:
"Guilty Junk Foodies"

Profile Summary: *"Guilty Junk Foodies"*

- The ***"Guilty Junk Foodies"*** cluster represents consumers who are the least likely to have fruit juice in their homes;
- They represent 21% of the total consumer market;
- Compared to an average consumer, they:
  - ***Have the lowest incomes;***
  - ***Are the least educated;***
  - ***Most likely to be White/Caucasian.***

- They are the least likely to shop for fruits and vegetables based on health or to eat fruit to stay healthy;
- They are the most likely to believe they and their families eat too little fruits and the least likely to associate eating fruits and vegetables with preventing heart disease, obesity, diabetes and cancer;
- They are the most likely to be enticed by other foods.

Cluster 5 – *"Guilty Junk Foodies"* (21% of the consumer market)

Always/Almost always has fruit juice available	**15% (vs. 37% for all); 13% almost always available (vs. 21% for all)**
Lowest daily consumption of cups of fruit	*0.5 cups of fruit per day (vs. 0.8 cups for all)*
Key Characteristics	
Lowest income, least educated, most likely to be White/Caucasian	*60% earn less than $50,000 (vs. 47% for all)* *39% only have a high school education (vs. 24% for all)* *88% are White/Caucasian (vs. 81% for all)*
Most likely to believe they and their family eats too little fruits	*81% believe they eat too little (vs. 55% for all)*
Least likely to shop for fruits and vegetables based on "healthy"	*19% ranked it in their top 3 (vs. 33% for all)*
Least likely to eat fruit daily at the dinner table and in front of the TV Most likely to never eat fruit in a restaurant	*8% eat it daily at the dinner table (vs. 36% for all)* *4% eat it daily in front of the TV (vs. 25% for all)* *34% never eat it in a restaurant (vs. 15% for all)*
Least likely to eat fruit to "stay healthy"	*62% cited this benefit (vs. 79% for all)*
Least likely to believe that consuming fruits and vegetables may prevent heart disease, overweight and obesity, diabetes and cancer	*56% identified heart disease (vs. 69% for all)* *63% identified overweight and obesity (vs. 72% for all)* *40% identified diabetes (vs. 56% for all)* *36% identified cancer (vs. 47% for all)*
Most likely to forget to buy fruits and vegetables and to be enticed by other foods	*25% forget to buy (vs. 16% for all)* *50% are enticed by other foods (vs. 37% for all)*

Key Purchase Behaviors: *"Guilty Junk Foodies"*

- The key benefits of fruit juice for ***"Guilty Junk Foodies"*** *are:*
  - *Tastes good (78% citing this benefit),*
  - *I and/or my family likes them (68% citing this benefit),*
  - *Healthy (60% citing this benefit).*

- They buy their fruit juice monthly.
  - *Daily (%)*
  - Weekly (51%)
  - ***Monthly (52%)***

- They are buying more compared to last year.
  - *13% buying more fruit juice in the past 3 months compared to 1 year earlier, 78% the same, 9% less*

- They waste a little less than average.
  - *88% do not throw any of their fruit juice out (vs. 84% for all)*

Key Purchase Behaviors: *"Guilty Junk Foodies"(cont'd)*

- They buy their fruit juice primarily at the grocery store.
  - *Grocery store (82%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (50%)*
  - *Club stores (BJ's, Sam's, Costco) (8%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 75% would at least scan a sign on a supermarket display and 78% 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 75% to a television news segment;*
  - *Online: 66% 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 (34% ranked it #1).*

Key Purchase Behaviors: *"Guilty Junk Foodies"(cont'd)*

- They are much less familiar with the Fruits & Veggies – More Matters campaign…
  - *69% stated that they had never seen or heard about it (vs. 52% for all)*
- …and are much less likely to be motivated by it or to buy because of it.
  - *23% were motivated (vs. 35% for all)*
  - *27% 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 (45%),*
  - *Supermarket display (32%),*
  - *Magazines (14%).*