Research conducted by:

ON Research

On behalf of:

PRODUCE FOR BETTER HEALTH FOUNDATION:

PBH Foundation - Cluster Analysis

2012 Report: Canned Fruit

Sponsored by:

Del Monte Quality

Eat Healthy. Live Healthy.®

pma

Table of Contents

- Objectives and Methodology
- Summary of Key Findings and Observations
- Clustering Overview
- Cluster Profiles
  1. *"Young Healthies"*
  2. *"Mrs. Waltons"*
  3. *"TV Junkies"*
  4. *"Working Affluents"*
  5. *"Jane Does"*
  6. *"Empty Nesters"*
  7. *"Anti-fruits"*

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

- Canned fruit is very popular.
  - *Only 6% of consumers never have canned fruit available in their homes*

- Seven (7) clusters define the canned 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 canned fruit, from highest to lowest].*
  1. *"Young Healthies" (6% of total consumer market)*
  2. *"Mrs. Waltons" (7% of total consumer market)*
  3. *"TV Junkies"(7% of total consumer market)*
  4. *"Working Affluents" (19% of total consumer market)*
  5. *"Jane Does" (28% of total consumer market)*
  6. *"Empty Nesters" (16% of total consumer market)*
  7. *"Anti-fruits" (17% 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,*
  - *Education,*
  - *Household size.*
- The consumption of canned fruit is highly correlated to the average consumption of all forms of fruit while the specific advantage of canned fruit over other forms is their convenience (easy to use, keep well).
- Cost is not the primary barrier – the third highest consumers of canned fruit ("TV Junkies"), for example, are the most price sensitive regarding fruit in general but still purchased more canned fruit this year compared to last.
- A general attitude toward fruit appears to be the key determinant of canned fruit consumption – those who find fruit in general to be healthy and/or appetizing are more likely to consume canned fruit compared to those who do not.

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 canned fruit are monthly, reach will be critical.

- In terms of reach, certain clusters may represent especially attractive targets:
  - *"Mrs. Waltons"* (least price sensitive, largest household size, buying more this year compared to last year);
  - *"TV Junkies"* (most likely to find fruit, in general, not appetizing but most likely to cite easy to use as the advantage of canned fruit, buying more this year compared to last year).

Summary of Key Findings and Observations

- Increased visibility of the Fruits & Veggies – More Matters campaign may help stimulate demand.
  - *"Young Healthies" (the highest consumers of canned fruit) have both above average awareness and motivation;*
  - *"Mrs. Waltons" are less aware of the campaign but more likely to purchase due to exposure to the campaign.*

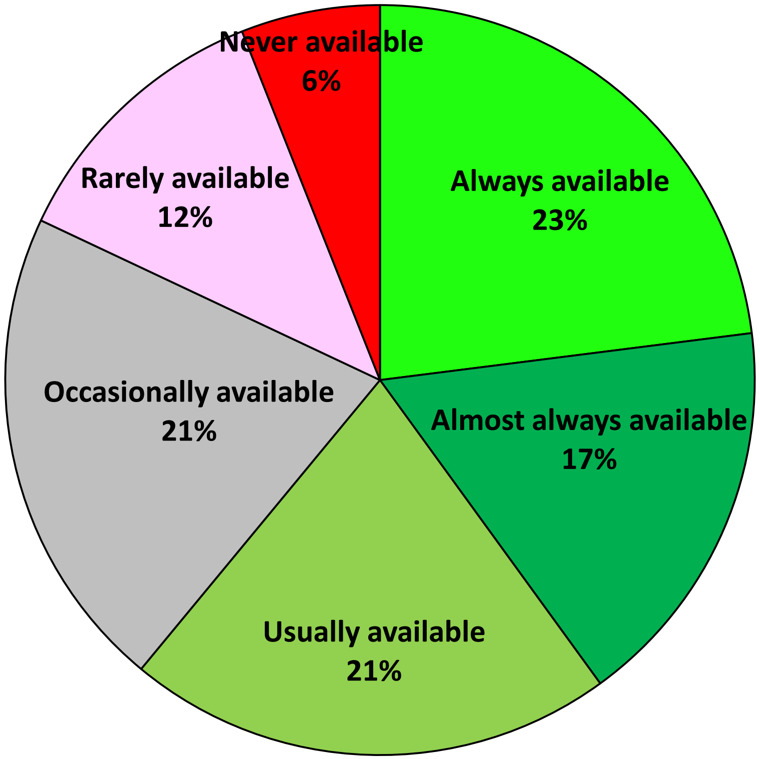
- Key media for the campaign appear to be supermarket displays, TV and magazines as these are the most likely to be self-reported by consumers as the primary ways by which they learned of the campaign.

Clustering Overview

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

➢Only 6% of consumers never have canned fruit available in their homes.

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



n=1,300

ON Research

Cluster Drivers

- Cluster analysis revealed that 30 of the 81 independent variables tested significantly and differentiated segments with the consumer market regarding canned 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

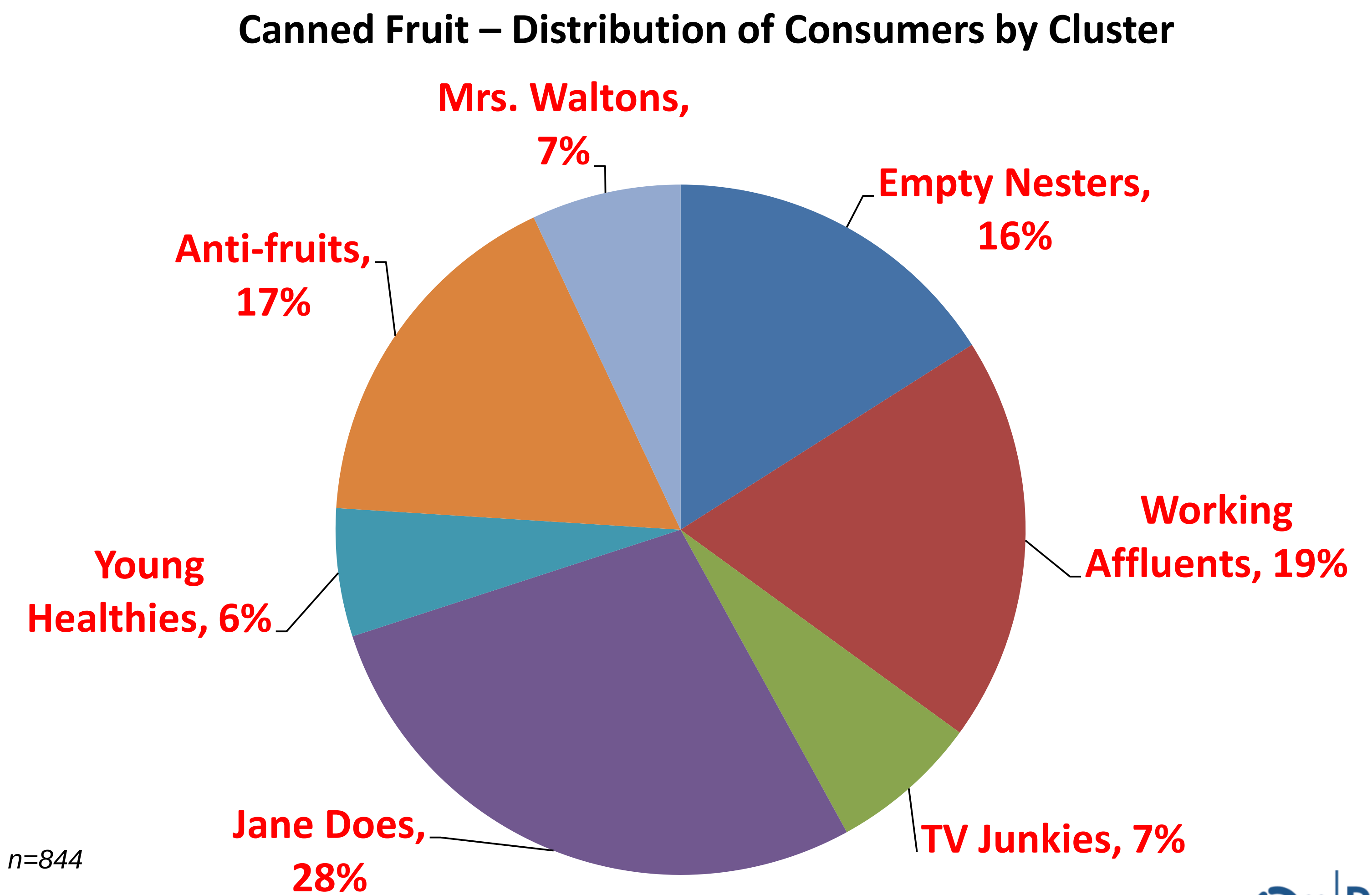
- *Education, Work Status, Age;*
- *Daily consumption of all forms of fruit;*
- *Consumption occasions;*
- *Barriers to including fruits and vegetables in meals and snacks.*

Secondary Cluster Drivers

- *# of people in household;*
- *Children living at home;*
- *Income, ethnicity;*
- *Factors when shopping for and eating fruits and vegetables;*
- *Disease prevention/Health benefits;*
- *Time spent preparing dinner.*

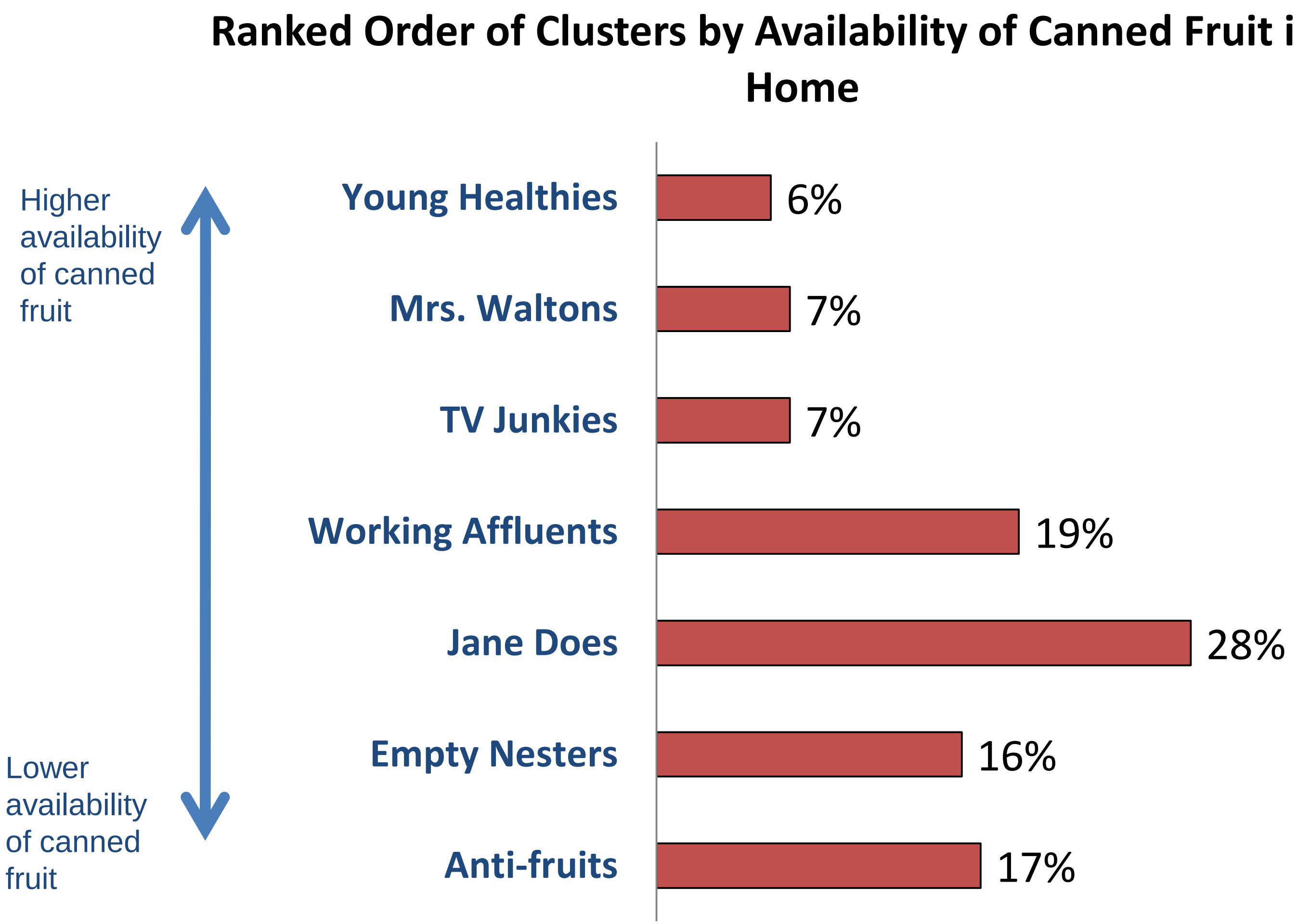
Cluster analysis produced 7 clusters for canned fruit

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



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

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



Cluster Profile:
“Young Healthies”

Profile Summary: *"Young Healthies"*

- The ***"Young Healthies"*** cluster represents consumers who are most likely to have canned fruit in their homes;
- They represent 6% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Be younger;***
  - ***Work full-time;***
  - ***Be non-White, particularly Asian/Pacific Islander.***
- They consume the highest average daily cups of fruit and are the most likely to eat fruit daily at dinner, at work and at events;
- They are the most concerned about healthiness when shopping for fruits and vegetables;
- They are the least likely to cite lack of a good range of fruits and vegetables in restaurants as well as poor local store quality as barriers.

Cluster 5 – *"Young Healthies"* (6% of total consumer market)

Always/Almost always has canned fruit available	**44% (vs. 24% for all); 26% almost always available (vs. 17% for all)**
Highest daily consumption of cups of fruit	*1.7 cups of fruit per day (vs. 0.9 cups for all)*
Key Characteristics	
Youngest, most likely to be working full-time, less likely to be White (more likely to be Asian/Pacific Islander)	*Average age is 38 (vs. 45 for all)* *58% work full-time (vs. 31% for all)* *68% White/Caucasian (vs. 84% for all), 10% Asian/Pacific Islander (vs. 5% for all)*
Care most about **healthiness** when shopping for fruits and vegetables	*68% ranking healthiness in their top 3 most important factors when shopping for fruits and vegetables (vs. 31% for all)*
Most likely to eat fruit daily at the dinner table, in the work cafeteria, at events (school, church, community functions, sporting events)	*70% eat it daily at the dinner table at home (vs. 35% for all)* *38% eat it daily in the work cafeteria (vs. 6% for all)* *28% eat it daily at events (vs. 6% for all)*
Most likely to believe that consuming fruits and vegetables may be beneficial for preventing depression	*38% (vs. 26% for all)*
Least likely to agree that it is difficult for them personally to include fruits and vegetables in meals and snacks because members of their family have different fruit and vegetable likes and dislikes, that there is not a good range of fruits and vegetables available in restaurants, or quality fruits and vegetables are not available in local stores	*50% disagree regarding family likes/dislikes (vs. 23% for all)* *70% disagree regarding restaurant range (vs. 35% for all)* *84% disagree regarding local store quality (vs. 50% for all)*

Key Purchase Behaviors: *"Young Healthies"*

- The key benefits of canned fruit for ***"Young Healthies"*** *are:*
  - *Quick to prepare (78% citing this benefit),*
  - *Easy to use (78% citing this benefit),*
  - *Tastes good (70% citing this benefit).*
- They buy their canned fruit weekly.
  - *Daily (4%)*
  - ***Weekly (61%)***
  - *Monthly (26%)*
- They are buying more compared to last year.
  - *13% buying more canned fruit in the past 3 months compared to 1 year earlier, 78% the same, 9% less*
- They waste very little.
  - *91% do not throw any of their canned fruit out*
  - *9% throw out 1/10th or less*

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

- They buy their canned fruit primarily at the grocery store.
  - *Grocery store (100%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (65%)*
  - *Club stores (BJ's, Sam's, Costco) (39%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 92% would at least scan a sign on a supermarket display and 96% a supermarket flyer/newspaper ad;*
  - *TV: 98% 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: 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 (52% ranked it #1).*

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

- They are more familiar with the Fruits & Veggies – More Matters campaign…
  - *Only 44% stated that they had never seen or heard about it (vs. 53% for all)*

- …and twice as likely to be motivated by it, especially to buy.
  - *68% were motivated (vs. 35% for all)*
  - *78% 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 (43%),*
  - *TV (32%),*
  - *Food package(29%).*

Cluster Profile:
“Mrs. Waltons”

Profile Summary: *"Mrs. Waltons"*

- The ***"Mrs. Waltons"*** cluster represents consumers who are the second most likely to have canned fruit in their homes;
- They represent 7% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Not be working outside the home;***
  - ***Have a large household (5 or more people).***
- They consume the second highest average daily cups of fruit and are the least price sensitive;
- Fruit is top-of-mind with them and they are the most likely to find fruit appetizing;
- They spend the most amount of time preparing a dinner meal.

Cluster 7 – *"Mrs. Waltons"* (7% of total consumer market)

Always/Almost always has canned fruit available	**35% (vs. 24% for all); 11% almost always available (vs. 17% for all)**
Second highest daily consumption of cups of fruit	*1.6 cups of fruit per day (vs. 0.9 cups for all)*
<u>Key Characteristics</u>	
Most likely not to work outside the home and to have a very large household	*37% live with 4 or more people (vs. 23% for all)* *86% do not work outside the home (vs. 52% for all)*
Least price sensitive	*77% disagree that fruit is too expensive (vs. 25% for all)*
Most likely to have fruit top-of-mind and to monitor their consumption	*2% agree that they forget to buy fruits and vegetables (vs. 16% for all)* *2% are enticed by other foods (vs. 37% for all)* *2% agree that fruits and vegetables go bad before they can eat them (vs. 36% for all)*
Least likely to eat fruit in the work cafeteria, or at their office desk and most likely to eat it monthly in a restaurant	*93% never eat it n the work cafeteria (vs. 71% for all)* *97% never eat it daily at their office desk (vs. 56% for all)* *47% eat it monthly in a restaurant (vs. 29% for all)*
Spends the most amount of time making a dinner meal	*44 min (vs. 33 min for all)*
Least likely to agree that it is difficult for them personally to include fruits and vegetables in meals and snacks because fruit is not appetizing or that fruit is time consuming to purchase and prepare	*97% disagree regarding fruit not being appetizing (vs. 57% for all)* *81% disagree regarding time consuming (vs. 31% for all)* *84% disagree regarding local store quality (vs. 50% for all)*
Least likely to feel a need for ideas about new ways to prepare fruits and vegetables	*19% agree (vs. 45% for all)*

Key Purchase Behaviors: *“Mrs. Waltons”*

- The key benefits of canned fruit for ***“Mrs. Waltons”*** *are:*
  - *Keep well (70% citing this benefit),*
  - *Tastes good (70% citing this benefit),*
  - *Easy to use (67% citing this benefit),*
  - *I and/or my family likes them (67% citing this benefit).*
- They buy their canned fruit monthly.
  - *Daily (0%)*
  - *Weekly (37%)*
  - ***Monthly (53%)***
- They are buying more compared to last year.
  - *13% buying more canned fruit in the past 3 months compared to 1 year earlier, 80% the same, 7% less*
- They waste very little.
  - *97% do not throw any of their canned fruit out*
  - *3% throw out 1/10th or less*

Key Purchase Behaviors: "*Mrs. Waltons*"*(cont'd)*

- They buy their canned fruit primarily at the grocery store.
  - *Grocery store (93%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (43%)*
  - *Club stores (BJ's, Sam's, Costco) (10%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 84% would at least scan a sign on a supermarket display and 82% a supermarket flyer/newspaper ad;*
  - *TV: 79% would at least listen to a television commercial regarding a type of food that they might enjoy and 81% 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 (39% ranked it #1).*

Key Purchase Behaviors: *"Mrs. Waltons"(cont'd)*

- They are a little less familiar with the Fruits & Veggies – More Matters campaign…
  - *60% 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.
  - *56% 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:
  - *Healthcare provider (30%),*
  - *Internet (30%),*
  - *TV, Ads, Supermarket displays, Food package (26%).*

Cluster Profile:
“TV Junkies”

Profile Summary: *"TV Junkies"*

- The ***"TV Junkies"*** cluster represents consumers who are the third most likely to have canned fruit in their homes;
- They represent 7% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Work part-time;***
  - ***Be a minority, especially Asian/Pacific Islander.***

- They appear to watch a lot of TV (55% state that they eat fruit daily in front of the TV);
- They are the most price sensitive and the most likely to find fruit not appetizing and time consuming to purchase and prepare;
- They are also the most likely to forget to buy fruits and vegetables and to be enticed by other foods;
- They are the most likely to believe they need ideas about new ways to prepare fruits and vegetables.

Cluster 3 – *"TV Junkies"* (7% of total consumer market)

Always/Almost always has canned fruit available	**25% (vs. 24% for all); 33% almost always available (vs. 17% for all)**
Third highest daily consumption of cups of fruit	*1.5 cups of fruit per day (vs. 0.9 cups for all)*
<u>Key Characteristics</u>	
Most likely to work part-time and to be a minority, especially Asian/Pacific Islander	*28% work part-time (vs. 17% for all)* *62% are White/Caucasian (vs. 84% for all), 12% African-American (vs. 5% for all), 18% Asian/Pacific Islander (vs. 5% for all)*
Least likely to believe that fruits and vegetables may provide antioxidant benefits but most likely to believe in their protein benefits	*58% believe in antioxidants (vs. 81% for all)* *67% believe in protein (vs. 50% for all)*
Most price sensitive	*77% agree that fruit is too expensive (vs. 48% for all)*
Most likely to find fruit not appetizing and time consuming to purchase and prepare; most likely to forget to buy them and to be enticed by other foods	*40% agree that fruit is not appetizing (vs. 7% for all)* *41% agree that fruit is time consuming to purchase and prepare (vs. 15% for all)* *35% agree that they forget to buy fruits and vegetables* *68% agree they are enticed by other foods (vs. 37% for all)*
Most likely to eat fruit daily in front of the TV, in their car and in a restaurant and to eat it at least occasionally in the work cafeteria/office desk	*55% eat it daily in front of the TV (vs. 25% for all)* *28% eat it daily in their car (vs. 4% for all)* *18% eat it daily in a restaurant (vs. 3% for all)* *5% never eat it in the work cafeteria (vs. 71% for all)* *5% never eat it at the office desk (vs. 56% for all)*
Most likely to agree that they find it difficult for them personally to include fruits and vegetables in meals and snacks because members of their family have different likes and dislikes	*87% agree (vs. 51% for all)*
Most likely to need ideas about new ways to prepare fruits and vegetables	*67% agree (vs. 45% for all)*

Key Purchase Behaviors: *“TV Junkies”*

- The key benefits of canned fruit for ***“TV Junkies”*** *are:*
  - *Easy to use (82% citing this benefit),*
  - *Keep well (77% citing this benefit),*
  - *Good snack (71% citing this benefit)/ I and/or my family likes them (71% citing this benefit).*
- They buy their canned fruit weekly.
  - *Daily (12%)*
  - ***Weekly (71%)***
  - *Monthly (12%)*
- They are buying more compared to last year.
  - *12% buying more canned fruit in the past 3 months compared to 1 year earlier, 82% the same, 6% less*
- They waste the most.
  - *59% do not throw any of their canned fruit out (vs.79% for all)*

Key Purchase Behaviors: *"TV Junkies"(cont'd)*

- They buy their canned fruit primarily at a Supercenter.
  - *Supercenter (Wal-mart, Super Target, Meijer) (94%)*
  - *Grocery store (88%)*
  - *Club stores (BJ's, Sam's, Costco) (41%)*

- Intercept them in the supermarket, on TV or the radio, on social media and online.
  - *Supermarket: 88% would at least scan a sign on a supermarket display and 83% 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 87% to a television news segment;*
  - *Radio: 82% would at least listen to a radio news segment regarding a type of food that they might enjoy;*
  - *Facebook/Twitter/social media post: 80% would at least read a post;*
  - *Online: 58% 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 (25% ranked it #1).*

Key Purchase Behaviors: *"TV Junkies"(cont'd)*

- They are the most familiar with the Fruits & Veggies – More Matters campaign…
  - *38% stated that they had never seen or heard about it (vs. 53% for all)*

- …and are more likely to be motivated by it, especially to buy.
  - *65% 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:
  - *Food package (49%),*
  - *TV (38%),*
  - *Magazines (38%).*

Cluster Profile:
“Working Affluents”

Profile Summary: *"Working Affluents"*

- The ***"Working Affluents"*** cluster represents consumers who are the fourth most likely to have canned fruit in their homes;
- They represent 19% of the total consumer market, the second largest segment;
- Compared to an average consumer, they are more likely to:
    - ***White/Caucasian;***
    - ***Work full-time;***
    - ***Have above average income.***
- Their attitudes and behaviors regarding fruits and vegetables are largely consistent with the average consumer.

Cluster 2 – *"Working Affluents"* (19% of total consumer market)

Always/Almost always has canned fruit available	**28% (vs. 24% for all); 17% almost always available (vs. 17% for all)**
Fourth highest daily consumption of cups of fruit	*1.3 cups of fruit per day (vs. 0.9 cups for all)*
Key Characteristics	
More likely to be White/Caucasian and have higher income and work full-time	*91% are White/Caucasian (vs. 84% for all)* *25% earn $100k or more (vs. 16% for all)* *56% work full-time (vs. 31% for all)*
Least likely to believe that fruits and vegetables may provide protein benefits	*39% believe in protein (vs. 50% for all)*
Most likely to eat fruit weekly at the dinner table and monthly in their car	*57% eat it weekly at the dinner table (vs. 33% for all)* *25% eat it monthly in their car (vs. 17% for all)*

Key Purchase Behaviors: *"Working Affluents"*

- The key benefits of canned fruit for ***"Working Affluents"*** *are:*
  - *Easy to use (73% citing this benefit),*
  - *Keep well (60% citing this benefit),*
  - *Quick to prepare (57% citing this benefit).*
- They buy their canned fruit monthly.
  - *Daily (0%)*
  - Weekly (33%)
  - ***Monthly (45%)***
- They are buying less compared to last year.
  - *8% buying more canned fruit in the past 3 months compared to 1 year earlier, 82% the same, 10% less*
- They waste little.
  - *80% do not throw any of their canned fruit out (vs.79% for all)*

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

- They buy their canned fruit primarily at the grocery store.
  - *Grocery store (78%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (61%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 79% would at least scan a sign on a supermarket display and 87% 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 87% 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 (59% ranked it #1).*

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

- They have 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 are a little less likely to be motivated by it, especially to buy.
  - *29% 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 (34%),*
  - *Magazines (22%),*
  - *Internet, TV, Ads (19%).*

Cluster Profile:
“Jane Does”

Profile Summary: *"Jane Does"*

- The ***"Jane Does"*** cluster represents consumers who are the third least likely to have canned fruit in their homes;
- They represent 28% of the total consumer market, the largest segment;
- They have no significant distinguishing characteristics but rather represent a typical consumer.

Cluster 4 – *"Jane Does"* (28% of total consumer market)

Always/Almost always has canned fruit available	**25% (vs. 24% for all); 17% almost always available (vs. 17% for all)**
Third lowest daily consumption of cups of fruit	*1.1 cups of fruit per day (vs. 0.9 cups for all)*
Key Characteristics	
Most likely to eat fruit weekly in front of the TV	*51% eat it monthly in front of the TV (vs. 16% for all)*

Key Purchase Behaviors: *"Jane Does"*

- The key benefits of canned fruit for ***"Jane Does"*** *are:*
  - *Easy to use (78% citing this benefit),*
  - *Keep well (75% citing this benefit),*
  - *I and/or my family likes them (66% citing this benefit).*
- They buy their canned fruit monthly.
  - *Daily (1%)*
  - Weekly (37%)
  - ***Monthly (52%)***
- They are buying more compared to last year.
  - *15% buying more canned fruit in the past 3 months compared to 1 year earlier, 73% the same, 12% less*
- They waste little.
  - *78% do not throw any of their canned fruit out (vs.79% for all)*

Key Purchase Behaviors: *"Jane Does"(cont'd)*

- They buy their canned fruit primarily at the grocery store.
  - *Grocery store (89%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (67%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 88% would at least scan a sign on a supermarket display and 83% 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: 77% 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: *"Jane Does"(cont'd)*

- They have slightly above average familiarity with the Fruits & Veggies – More Matters campaign…
  - *46% stated that they had never seen or heard about it (vs. 53% for all)*

- …but are a little less likely to be motivated by it, though are as likely to buy as an average consumer because of it.
  - *30% 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 (43%),*
  - *TV (28%),*
  - *Magazines (26%).*

Cluster Profile:
“Empty Nesters”

Profile Summary: *"Empty Nesters"*

- The ***"Empty Nesters"*** cluster represents consumers who are the second least likely to have canned fruit in their homes;
- They represent 16% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Older;***
  - ***Living as a couple without children at home;***
  - ***Have the highest household income;***
  - ***Be the most educated.***
- Their attitudes and behaviors regarding fruits and vegetables are largely consistent with the average consumer.

Cluster 1 – *"Empty Nesters"* (16% of total consumer market)

Always/Almost always has canned fruit available	**19% (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. 0.9 cups for all)*
Key Characteristics	
Oldest, most likely to be a couple living together, least likely to have children under 18 living at home, highest household income and most educated	*Average age is 53 (vs. 45 for all)* *47% have household size of 2 (vs. 12% for all)* *51% have no children under 18 living at home (vs. 28% for all)* *29% earn $100k or more (vs. 16% for all)* *35% have completed graduate work (vs. 12% for all)*
Most likely to believe that fruits and vegetables may provide antioxidant benefits	*88% believe in antioxidants (vs. 81% for all)*

Key Purchase Behaviors: *"Empty Nesters"*

- The key benefits of canned fruit for ***"Empty Nesters"*** *are:*
  - *Easy to use (71% citing this benefit),*
  - *Keep well (71% citing this benefit),*
  - *Quick to prepare (58% citing this benefit).*

- They buy their canned fruit monthly.
  - *Daily (0%)*
  - Weekly (22%)
  - ***Monthly (49%)***

- They are buying less compared to last year.
  - *9% buying more canned fruit in the past 3 months compared to 1 year earlier, 75% the same, 17% less*

- They waste little.
  - *85% do not throw any of their canned fruit out (vs.79% for all)*

Key Purchase Behaviors: "*Empty Nesters*"*(cont'd)*

- They buy their canned fruit primarily at the grocery store.
  - *Grocery store (83%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (58%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 85% would at least scan a sign on a supermarket display and 85% a supermarket flyer/newspaper ad;*
  - *TV: 77% 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: 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 (57% ranked it #1).*

Key Purchase Behaviors: *"Empty Nesters"(cont'd)*

- They have below average familiarity with the Fruits & Veggies – More Matters campaign…
  - *61% stated that they had never seen or heard about it (vs. 53% for all)*
- …and are less likely to be motivated by it, especially to buy.
  - *20% were motivated (vs. 35% for all)*
  - *39% 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 (50%),*
  - *TV (26%),*
  - *Ads (22%).*

Cluster Profile:
“Anti-fruits”

Profile Summary: *“Anti-fruits”*

- The ***“Anti-fruits”*** cluster represents consumers who are the least likely to have canned fruit in their homes;
- They represent 17% of the total consumer market;
- Compared to an average consumer, they are:
  - ***The least likely to be educated;***
  - ***The most likely to be White/Caucasian.***

- They consume the least number of cups of fruit per day and the most likely to never eat fruit on several occasions;
- They are the least likely to shop for fruits and vegetables based on healthiness;
- They spend the least amount of time preparing a dinner meal.

Cluster 6 – *"Anti-fruits"* (17% of total consumer market)

Always/Almost always has canned fruit available	**10% (vs. 24% for all); 14% almost always available (vs. 17% for all)**
Lowest daily consumption of cups of fruit	*Less than 0.5 cups of fruit per day (vs. 0.9 cups for all)*
Key Characteristics	
Least educated, most likely to be White/Caucasian	*34% have only a high school education (vs. 20% for all)* *93% are White/Caucasian (vs. 84% for all)*
Least likely to shop for fruits and vegetables based on healthiness	*10% ranked in their top 3 (vs. 31% for all)*
Most likely to never eat fruit at the dinner table, in front of the TV, in the car, in a restaurant or at events	*30% never eat it at the dinner table (vs. 9% for all)* *22% never eat it in front of the TV (vs. 8% for all)* *66% never eat it in the car (vs. 38% for all)* *40% never eat it in a restaurant (vs. 15% for all)* *64% never eat it at events (vs. 39% for all)*
Spend the least amount of time making a dinner meal	*29 min (vs. 33 min for all)*
Least likely to believe that consuming fruits and vegetables may help prevent depression	*12% believe (vs. 26% for all)*

Key Purchase Behaviors: *"Anti-fruits"*

- The key benefits of canned fruit for ***"Anti-fruits"*** *are:*
  - *Easy to use (71% citing this benefit),*
  - *Keep well (63% citing this benefit),*
  - *Tastes good (57% citing this benefit).*

- They buy their canned fruit monthly.
  - *Daily (0%)*
  - Weekly (30%)
  - ***Monthly (54%)***

- They are buying less compared to last year.
  - *5% buying more canned fruit in the past 3 months compared to 1 year earlier, 80% the same, 14% less*

- They waste more than an average consumer.
  - *63% do not throw any of their canned fruit out (vs.79% for all)*

Key Purchase Behaviors: *"Anti-fruits"(cont'd)*

- They buy their canned fruit primarily at the grocery store.
  - *Grocery store (80%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (55%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 71% would at least scan a sign on a supermarket display and 75% a supermarket flyer/newspaper ad;*
  - *TV: 69% would at least listen to a television commercial regarding a type of food that they might enjoy and 73% to a television news segment;*
  - *Online: 69% 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: *"Anti-fruits"(cont'd)*

- They are the least likely to be familiar with the Fruits & Veggies – More Matters campaign…
  - *67% stated that they had never seen or heard about it (vs. 53% for all)*
- …and are less likely to be motivated by it, especially to buy.
  - *20% 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:
  - *Supermarket display (40%),*
  - *TV (33%),*
  - *Magazines (17%).*