*Research conducted by:*

ON Research

*On behalf of:*

# PRODUCE FOR BETTER HEALTH FOUNDATION:

# PBH Foundation - Cluster Analysis

## 2012 Report: Frozen 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



- Frozen fruit is popular.
    - *Only 9% of consumers never have frozen fruit available in their homes*

- Five (5) clusters define the frozen fruit consumer market, and the size of these clusters varies from 13% to 28% *[ranked below in order of availability of frozen fruit, from highest to lowest].*
    1. *"Convenients" (23% of total consumer market)*
    2. *"Healthy Parents" (13% of total consumer market)*
    3. *"Stay at Home Moms"(22% of total consumer market)*
    4. *"Average Janes" (28% of total consumer market)*
    5. *"Pass Me a Beers" (14% 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:
  - *Education,*
  - *Employment status,*
  - *Income,*
  - *Ethnicity,*
  - *Age,*
  - *Parental status.*
- The consumption of frozen fruit is correlated to the average consumption of all forms of fruit. The specific advantage of frozen fruit over other forms is their convenience (easy to use, keep well, use in recipes).
- Frozen fruit may be perceived as the most value-oriented form: the most price sensitive segment regarding fruit in general, "*Convenients*", for example, is also the highest consumer of frozen fruit.

# 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 frozen fruit are monthly, reach will be critical.

- In terms of reach, certain clusters may represent especially attractive targets:
  - *"Healthy Parents"* (consume the most daily cups of fruit, highest income, most likely to believe frozen fruit is healthy, buying more this year compared to last year, but also waste more than the average);
  - *"Stay at Home Moms"* (largest household, spend the most amount of time making the dinner meal, most likely to indicate that they do not know what portion of their "plate" should be made up of fruits and vegetables).

# Summary of Key Findings and Observations



- Increased visibility of the Fruits & Veggies – More Matters campaign may help stimulate demand.
    - *"Convenients" and "Healthy Parents" (the highest and second highest consumers of frozen fruit) have both above average awareness and motivation.*

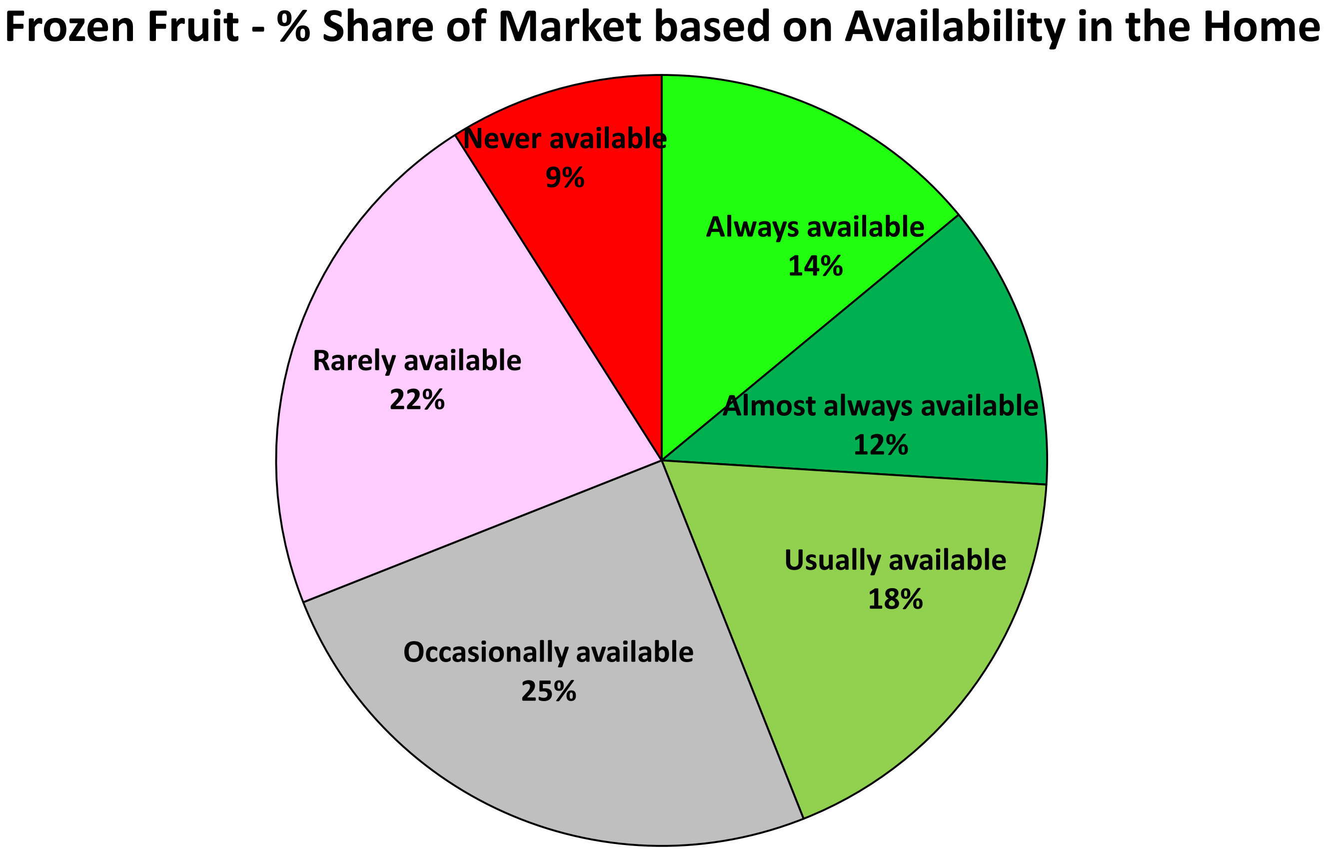
- Key media for the campaign appear to be supermarket displays, TV and food packages as these are the most likely to be self-reported by consumers as the primary ways by which they learned of the campaign.

# Clustering Overview

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



- Only 9% of consumers never have frozen fruit available in their homes.




*n=1,300*

# Cluster Drivers



➢ Cluster analysis revealed that 44 of the 81 independent variables tested significantly and differentiated segments with the consumer market regarding frozen fruit. These different clusters can be grouped based on those having a higher differentiating value (primary cluster drivers) and a lower differentiating value (secondary cluster drivers) based on their strength in predicting the cluster in question:

## Primary Cluster Drivers

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

## Secondary Cluster Drivers

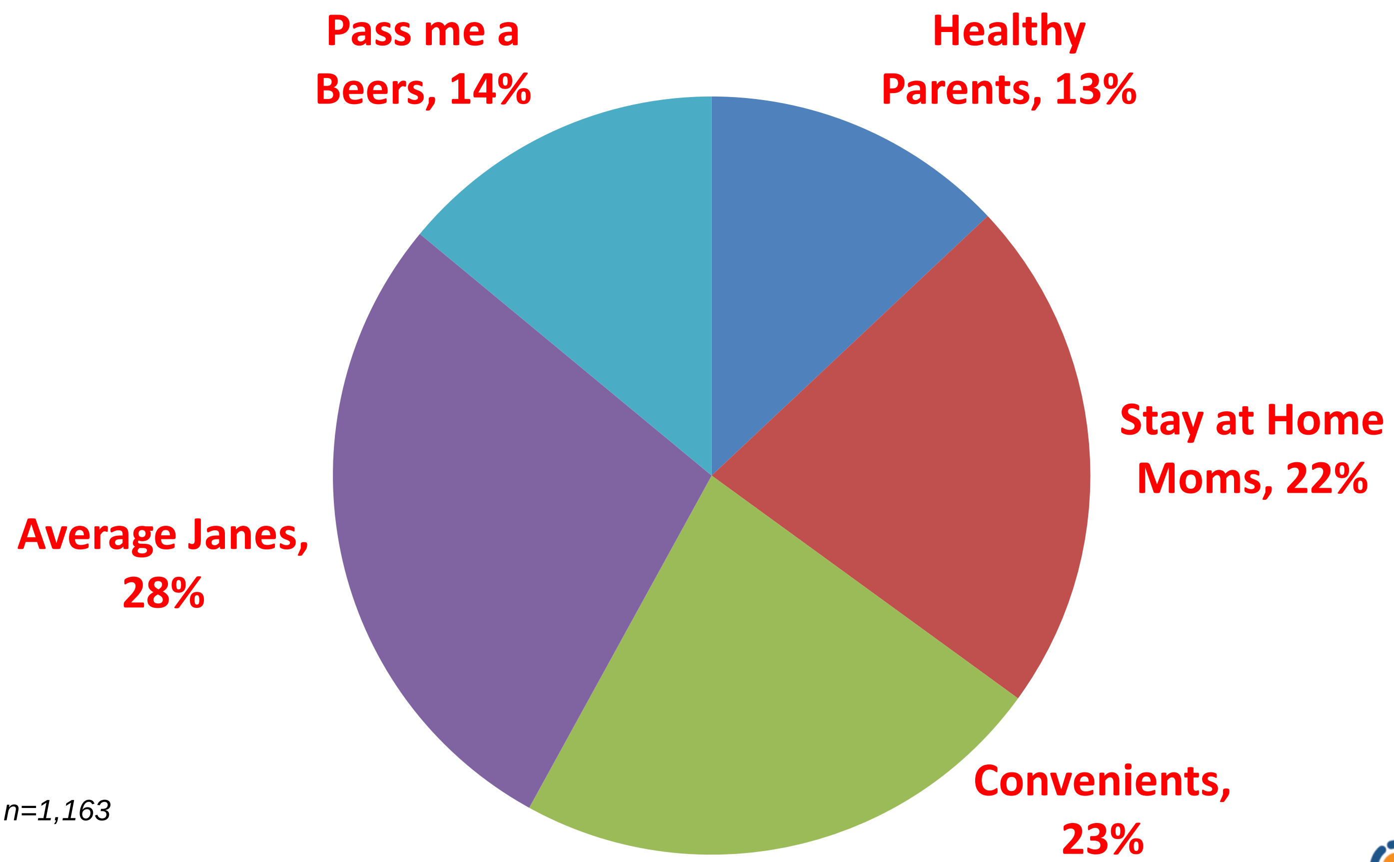
- *Household size, Age, Parental status;*
- *Satisfaction with daily eating habits regarding fruit;*
- *Health benefits;*
- *Motivations for eating fruits;*
- *Time preparing the dinner meal;*
- *Knowledge of what portion of their "plate" should be fruits and vegetables.*

# Cluster analysis produced 5 clusters for frozen fruit



- The size of the clusters range from 13% to 28%.

**Frozen Fruit – Distribution of Consumers by Cluster**

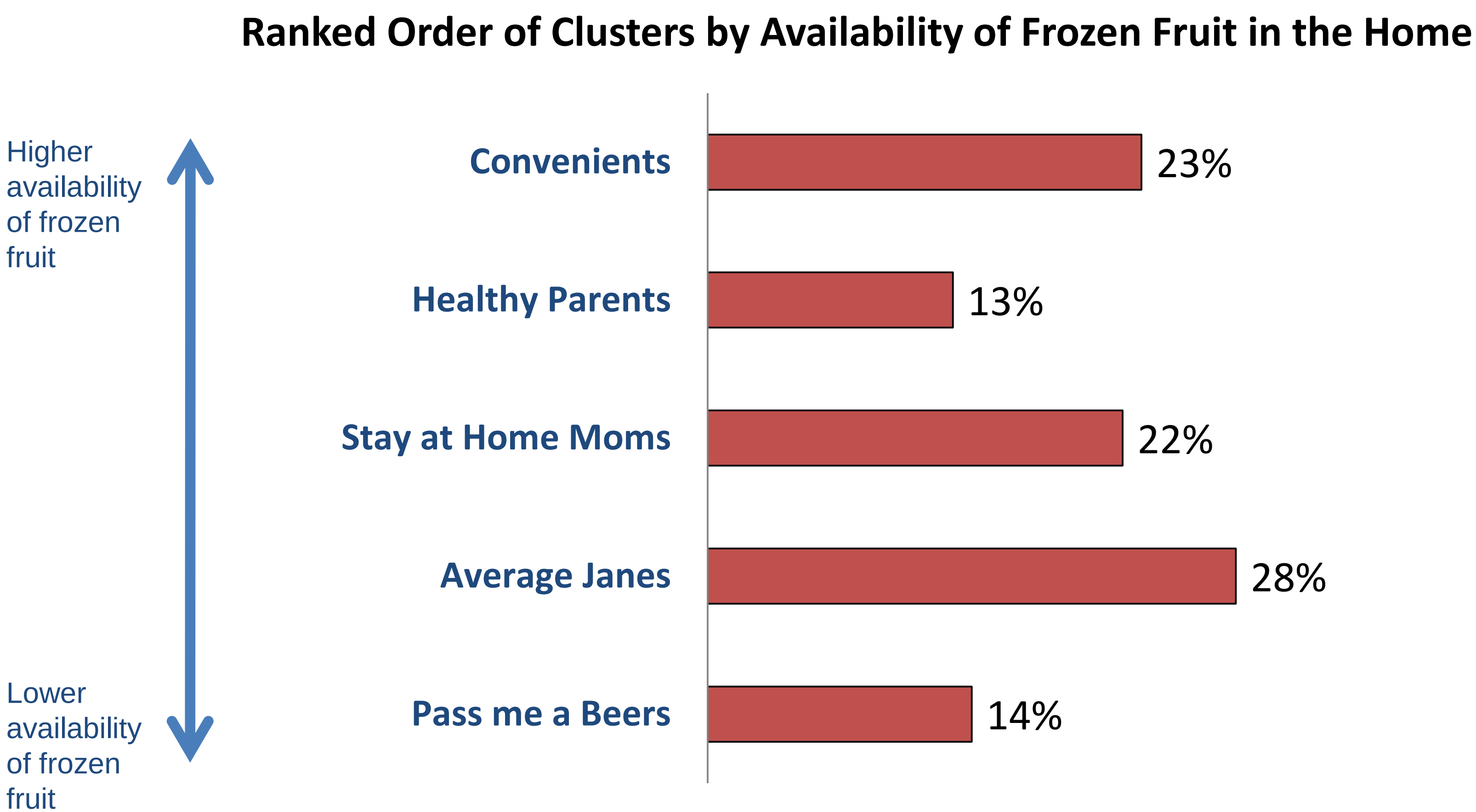



*n=1,163*

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



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



# Cluster Profile:
# *“Convenients”*

# Profile Summary: *"Convenients"*



- The ***"Convenients"*** cluster represents consumers who are most likely to have frozen fruit in their homes;
- They represent 23% of the total consumer market – the second largest segment;
- Compared to an average consumer, they are more likely to:
  - ***Be slightly younger;***
  - ***Work part-time;***
  - ***Highly educated;***
  - ***To have an ethnic background.***
- They consume the second highest average daily cups of fruit and are the most knowledgeable about the recommended daily allowance of fruits and vegetables;
- They are the most convenience-oriented: most likely to cite "convenient to use" as being important when shopping for fruits and vegetables and to complain that fruit is time consuming to purchase and prepare and that they go bad before they can eat them;
- They are the most price sensitive when it comes to fruit.

# Cluster 3 – *"Convenients"* (23% of the consumer market)

| | |
|---|---|
| **Always/Almost always has frozen fruit available** | **21% (vs. 14% for all); 18% almost always available (vs. 12% for all)** |
| Second highest daily consumption of cups of fruit | *1.0 cups of fruit per day (vs. 0.8 cups for all)* |
| **Key Characteristics** | |
| Slightly younger, most educated, most likely to be working part-time, most likely to have an ethnic background | *Average age is 40 (vs. 45 for all)*<br>*18% have completed graduate work (vs. 15% for all)*<br>*25% work part-time (vs. 18% for all)*<br>*73% White/Caucasian (vs. 81% for all), 8% Asian/Pacific Islander (vs. 5% for all), 9% Black/African-American (vs. 5% for all), 7% Hispanic/Latino (vs. 5% for all)* |
| Most likely to answer correctly that 50% of their "plate" should be made up of fruits and vegetables | *48% answered correctly (vs. 39% for all)* |
| Least likely to cite "freshness" as being important when shopping for fruits and vegetables but most likely to cite "convenient to use" | *50% cited freshness (vs. 62% for all)*<br>*22% cited convenient to use (vs. 14% for all)* |
| Most price sensitive | *61% agreed that fruit is too expensive (vs. 48% for all)* |
| Most 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 | *54% cited spoilage (vs. 36% for all)*<br>*53% enticed by other foods (vs. 37% for all)*<br>*61% cited members of their family have different likes/dislikes (vs. 50% for all)* |
| Least likely to like cite "like the taste" as one of their 3 most important reasons for eating fruits and vegetables but most likely to cite "to lose weight" | *38% cited "like the taste" (vs. 51% for all)*<br>*32% cited "to lose weight" (vs. 22% for all)* |
| Most likely to agree that quality fruits and vegetables are not available in local stores | *34% agree quality not available in local stores (vs. 21% for all)* |
| Most likely to agree that fruit is time consuming to purchase and prepare and most likely to need ideas about new ways to prepare fruits and vegetables | *34% agree that fruit is time consuming (vs. 17% for all)*<br>*61% agree that they need more ideas (vs. 45% for all)* |

# Key Purchase Behaviors: *“Convenients”*



- The key benefits of frozen fruit for ***“Convenients”*** *are:*
  - *Easy to use (57% citing this benefit),*
  - *Use in recipes (51% citing this benefit),*
  - *Keep well (48% citing this benefit).*

- They buy their frozen fruit monthly.
  - *Daily (5%)*
  - *Weekly (27%)*
  - ***Monthly (48%)***

- They are buying slightly less compared to last year.
  - *15% buying more frozen fruit in the past 3 months compared to 1 year earlier, 68% the same, 18% less*

- They waste more than average.
  - *59% do not throw any of their frozen fruit out (vs. 66% for all)*

# Key Purchase Behaviors: *"Convenients"(cont'd)*



- They buy their frozen fruit primarily at the grocery store.
  - *Grocery store (77%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (52%)*
  - *Club stores (BJ's, Sam's, Costco) (22%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 87% would at least scan a sign on a supermarket display and 86% 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 86% to a television news segment;*
  - *Online: 75% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (48% ranked it #1).*

# Key Purchase Behaviors: *"Convenients"(cont'd)*



- They are more familiar with the Fruits & Veggies – More Matters campaign…
  - *43% stated that they had never seen or heard about it (vs. 52% for all)*

- …and equally likely to be motivated by it.
  - *37% were motivated (vs. 35% for all)*
  - *46% 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 (33%),*
  - *TV (28%),*
  - *Magazines (26%).*

# Cluster Profile:
## *"Healthy Parents"*

# Profile Summary: *"Healthy Parents"*



- The ***"Healthy Parents"*** cluster represents consumers who are the second most likely to have frozen fruit in their homes;
- They represent 13% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***Be slightly younger;***
  - ***Have a child at home;***
  - ***Have the highest income;***
  - ***Be working full-time;***
  - ***Be Black/African-American.***
- They consume the highest average daily cups of fruit and are most likely to eat fruit daily at the dinner table, in front of the TV and at their office desk;
- They are the most likely to shop for fruits and vegetables based on healthiness and to eat fruits and vegetables themselves to stay healthy;
- They are the most likely to believe that frozen fruit is healthy and that they and their family eat too little fruit;
- The are also the most likely to believe that consuming fruits and vegetables may be beneficial for preventing many different diseases.

# Cluster 1 – *"Healthy Parents"* (13% of the consumer market)

| | |
|---|---|
| **Always/Almost always has frozen fruit available** | **16% (vs. 14% for all); 13% almost always available (vs. 12% for all)** |
| Highest daily consumption of cups of fruit | *1.8 cups of fruit per day (vs. 0.8 cups for all)* |
| **Key Characteristics** | |
| Slightly younger, most likely to have a child at home, highest income, most likely to be working full-time, most likely to be Black/African-American | *Average age is 40 (vs. 45 for all)*<br>*85% have a child under 18 living at home (vs. 71% (for all)*<br>*23% earn $100k or more (vs. 14% for all)*<br>*52% work full-time (vs. 31%for all)*<br>*10% are Black/African-American (vs. 7% for all)* |
| Least likely to shop for fruits and vegetables based on family preferences but most likely on healthiness; also most likely to indicate that they themselves eat fruits and vegetables to stay healthy | *23% ranked "family preferences" in their top 3 (vs. 34% for all)*<br>*46% ranked "healthy" (vs. 33% for all)*<br>*85% cited to "stay healthy" (vs. 79% for all)* |
| Most likely to believe that consuming fruits and vegetables may be beneficial for preventing heart disease, overweight and obesity, weight gain, diabetes, cancer, eye disease, and depression | *78% identified heart disease (vs. 69% for all)*<br>*83% identified overweight and obesity (vs. 72% for all)*<br>*76% identified weight gain (vs. 69% for all)*<br>*68% identified diabetes (vs. 56% for all); 38% depression (vs. 26% for all)*<br>*55% identified cancer (vs. 47% for all); 50% eye disease (vs. 38% for all)* |
| Most likely to agree that frozen fruits and vegetable are healthy and least likely to believe that they and their family eat too little fruit | *81% agree they are healthy (vs. 73% for all)*<br>*33% agree they eat too little (vs. 55% for all)* |
| Most likely to eat frozen fruit at the dinner table at home, in front of the TV, and at their office desk | *59% eat it daily at the dinner table (vs. 36% for all)*<br>*36% eat it daily in front of the TV (vs. 6% for all)*<br>*38% eat it daily at their office desk (vs. 13% for all)* |
| Least likely to agree that it is difficult for them personally to include fruits and vegetables in meals and snacks because quality fruits and vegetables are not available in local stores | *81% disagree regarding local store quality (vs. 52% for all)* |
| Very unlikely to think that fruit is time consuming to purchase and prepare and they are the least price sensitive | *85% disagree that it is time consuming (vs. 60% for all)*<br>*23% agree that fruit is too expensive (vs. 48%  for all)* |

# Key Purchase Behaviors: *"Healthy Parents"*



- The key benefits of frozen fruit for ***"Healthy Parents"*** *are:*
  - *Keep well (64% citing this benefit),*
  - *Easy to use (58% citing this benefit),*
  - *Use in recipes (49% citing this benefit).*

- They buy their frozen fruit monthly.
  - *Daily (0%)*
  - *Weekly (38%)*
  - ***Monthly (48%)***

- They are buying more compared to last year.
  - *21% buying more frozen fruit in the past 3 months compared to 1 year earlier, 70% the same, 10% less*

- They waste an average amount.
  - *69% do not throw any of their frozen fruit out, compared to 66% for all.*

# Key Purchase Behaviors: *"Healthy Parents"(cont'd)*



- They buy their frozen fruit primarily at the grocery store.
  - *Grocery store (73%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (59%)*
  - *Club stores (BJ's, Sam's, Costco) (25%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 88% would at least scan a sign on a supermarket display and 89% 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 87% 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 (54% ranked it #1).*

# Key Purchase Behaviors: *"Healthy Parents"* *(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. 52% for all)*

- …but more likely to be motivated by it, especially to buy.
  - *50% 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 (40%),*
  - *TV (24%),*
  - *Ads (21%).*

# Cluster Profile:

## *“Stay at Home Moms”*

# Profile Summary: *"Stay at Home Moms"*



- The ***"Stay at Home Moms"*** cluster represents consumers who are the third most likely to have frozen fruit in their homes;
- They represent 22% of the total consumer market;
- Compared to an average consumer, they are more likely to:
  - ***The oldest;***
  - ***To live in a large household;***
  - ***Not to be working outside the home;***
  - ***Be White/Caucasian.***

- They spend the most amount of time preparing the dinner meal and most likely to indicate they don't know what portion of their "plate" should be made up of fruits and vegetables.

# Cluster 2 – *"Stay at Home Moms"* (22% of the consumer market)

| | |
|---|---|
| **Always/Almost always has frozen fruit available** | **14% (vs. 14% for all); 13% almost always available (vs. 12% for all)** |
| Second highest daily consumption of cups of fruit | *0.8 cups of fruit per day (vs. 0.8 cups for all)* |
| **Key Characteristics** | |
| Oldest, most likely to live in a large household, most likely not to be working outside the home, most likely to be White/Caucasian | *Average age is 49 (vs. 45 for all)*<br>*32%  live in a household of 5 or more people (vs. 25% for all)*<br>*73% do not work outside the home (vs. 51% for all)*<br>*90% are White/Caucasian (vs. 81% 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 | *30% indicated "don't know/not sure" (vs. 22% for all)* |
| Least likely to rank "convenient to use" in their top 3 factors when shopping for fruits and vegetables | *8% ranked "convenient to use" (vs. 14% for all)* |
| Spends the most amount of time making a dinner meal | *38 mins (vs. 32 mins for all)* |
| Least likely to cite losing weight as one of the 3 most important reasons they themselves eat fruits and vegetables | *15% identified to lose weight (vs. 22% for all)* |

# Key Purchase Behaviors: *“Stay at Home Moms”*



- The key benefits of frozen fruit for ***“Stay at Home Moms”*** *are:*
  - *Keep well (66% citing this benefit),*
  - *Easy to use (58% citing this benefit),*
  - *Use in recipes (53% citing this benefit).*
- They buy their frozen fruit monthly.
  - *Daily (0%)*
  - *Weekly (26%)*
  - ***Monthly (46%)***
- They are buying less compared to last year.
  - *9% buying more frozen fruit in the past 3 months compared to 1 year earlier, 76% the same, 15% less*
- They waste the least.
  - *79% do not throw any of their frozen fruit out (vs. 66% for all)*

# Key Purchase Behaviors: *"Stay at Home Moms" (cont'd)*



- They buy their frozen fruit primarily at a grocery store.
  - *Grocery store (76%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (59%)*
  - *Club stores (BJ's, Sam's, Costco) (25%)*

- Intercept them in the supermarket, on TV or the radio, on social media and online:
  - *Supermarket: 89% would at least scan a sign on a supermarket display and 91% 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 86% to a television news segment;*
  - *Online: 75% ranked the Internet in their Top 3 places to go to obtain information about how to get themselves or their family to eat more fruits and vegetables (46% ranked it #1).*

# Key Purchase Behaviors: *“Stay at Home Moms”(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, but slightly more likely to buy.
  - *25% 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 (49%),*
  - *TV (28%),*
  - *Food package (28%).*

# Cluster Profile:
## *“Average Janes”*

# Profile Summary: *"Average Janes"*



- The ***"Average Janes"*** cluster represents consumers who are the second to least likely to have frozen fruit in their homes;
- They represent 28% of the total consumer market, the largest segment;
- Compared to an average consumer, they are more slightly more likely to:
  - ***Not be working outside of the home.***
- They are the most likely to cite "family preferences" as an important factor when shopping for fruits and vegetables;
- They are the second most likely to be price sensitive.

# Cluster 4- *"Average Janes"* (28% of the consumer market)

| | |
|---|---|
| **Always/Almost always has frozen fruit available** | **15% (vs. 14% for all); 11% almost always available (vs. 12% for all)** |
| Second lowest daily consumption of cups of fruit | *0.8 cups of fruit per day (vs. 0.8 cups for all)* |
| **Key Characteristics** | |
| Slightly more likely to not be working outside the home | *56% do not work outside the home (vs. 51% for all)* |
| Most likely to cite "family preferences" as an important factor when shopping for fruits and vegetables | *41% ranked it in their top 3 (vs. 34% for all)* |
| Second most likely to be price sensitive | *50% agree that fruit is too expensive (vs. 48% for all)* |

# Key Purchase Behaviors: *"Average Janes"*



- The key benefits of frozen fruit for ***"Average Janes"*** *are:*
  - *Keep well (64% citing this benefit),*
  - *Easy to use (52% citing this benefit),*
  - *Use in recipes (52% citing this benefit).*

- They buy their frozen fruit monthly.
  - *Daily (3%)*
  - Weekly (22%)
  - ***Monthly (44%)***

- They are buying less compared to last year.
  - *10% buying more frozen fruit in the past 3 months compared to 1 year earlier, 65% the same, 26% less*

- They waste a little less than average.
  - *61% do not throw any of their frozen fruit out (vs.69% for all)*

# Key Purchase Behaviors: *"Average Janes"* *(cont'd)*



- They buy their frozen fruit primarily at the grocery store.
  - *Grocery store (74%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (57%)*
  - *Club stores (BJ's, Sam's, Costco) (19%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 79% would at least scan a sign on a supermarket display and 85% 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 86% 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 (31% ranked it #1).*

# Key Purchase Behaviors: *"Average Janes"(cont'd)*



- They have average familiarity with the Fruits & Veggies – More Matters campaign…
  - *54% stated that they had never seen or heard about it (vs. 52% for all)*

- …and average motivation including to buy.
  - *37% 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 (41%),*
  - *Magazines (30%),*
  - *Ads (28%).*

# Cluster Profile:
## *"Pass Me a Beers"*

# Profile Summary: *"Pass Me a Beers"*



- The ***"Pass Me a Beers"*** cluster represents consumers who are the least likely to have frozen fruit in their homes;
- They represent 14% of the total consumer market;
- Compared to an average consumer, they are:
  - ***Most likely to be male;***
  - ***Most likely to live in a 2-person household;***
  - ***Least likely to have a child living at home;***
  - ***Least likely to be solely responsible for grocery shopping;***
  - ***Most likely to have lower income and be less educated.***

- They are the least likely to shop for fruits and vegetables based on healthiness, to eat fruit to stay healthy and to perceive frozen fruit as healthy;
- They are the least likely to believe that consuming fruits and vegetables may be beneficial in preventing heart disease but also the most likely to indicate that they and their family eat too little fruit.

# Cluster 5 – *"Pass Me a Beers"* (14% of the consumer market)

| | |
|---|---|
| **Always/Almost always has frozen fruit available** | **3% (vs. 14% for all); 4% almost always available (vs. 12% for all)** |
| Lowest daily consumption of cups of fruit | *0.5 cups of fruit per day (vs. 0.8 cups for all)* |
| **Key Characteristics** | |
| Most likely to be male, most likely to be in living in a 2-person household, least likely to be solely responsible for their household's grocery shopping, least likely to have a child living at home, lowest income, least educated | *Average age is 54 (vs. 45 for all)*<br>*30%  are male (vs. 20% for all)*<br>*51% are solely responsible (vs. 62% for all)*<br>*38% live in a household of 2 people (vs. 23% for all)*<br>*63% have a child under 18 living at home (vs. 71% for all)*<br>*57% earn less than $50,000 (vs. 47% for all)*<br>*34% only have a high school diploma (vs. 24% for all)* |
| Least likely to shop for fruits and vegetables based on healthiness , to eat fruit to stay healthy and to perceive frozen fruit as healthy | *26% cited healthy in their top 3 reasons (vs. 33% for all)*<br>*61% perceive it as healthy (vs. 73% for all)*<br>*69% cited they themselves eat fruit to stay healthy (vs. 79% for all)* |
| Least likely to eat fruit at all locations and spends the least amount of time making dinner | *30 mins (vs. 32 mins for all)* |
| Least likely to believe that consuming fruits and vegetables may be beneficial in preventing heart disease | *57% believe (vs. 69% for all)* |
| Most likely to believe they and their family eat too little fruit | *77% agree they eat too little (vs. 55% for all)* |

# Key Purchase Behaviors: *“Pass Me a Beers”*



- The key benefits of frozen fruit for ***“Pass Me a Beers”*** *are:*
  - *Keep well (65% citing this benefit),*
  - *Easy to use (50% citing this benefit),*
  - *Healthy (46% citing this benefit).*

- They buy their frozen fruit monthly.
  - *Daily (0%)*
  - Weekly (8%)
  - ***Monthly (65%)***

- They are buying less compared to last year.
  - *4% buying more frozen fruit in the past 3 months compared to 1 year earlier, 85% the same, 12% less*

- They waste an average amount.
  - *65% do not throw any of their frozen fruit out (vs.66% for all)*

# Key Purchase Behaviors: *"Pass Me a Beers"(cont'd)*



- They buy their frozen fruit primarily at the grocery store.
  - *Grocery store (69%)*
  - *Supercenter (Wal-mart, Super Target, Meijer) (50%)*
  - *Club stores (BJ's, Sam's, Costco) (19%)*

- Intercept them in the supermarket, on TV and online:
  - *Supermarket: 74% would at least scan a sign on a supermarket display and 80% 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 72% 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 (47% ranked it #1).*

# Key Purchase Behaviors: *"Pass Me a Beers"(cont'd)*



- They are much less familiar with the Fruits & Veggies – More Matters campaign…
  - *73% 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.
  - *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:
  - *TV (49%),*
  - *Supermarket display (31%),*
  - *Magazines (20%).*