Produce for Better Health Foundation
Moms with Kids 10 & Under and Primary Shopper Study
Summary and Key Points

PBH has annually conducted a survey of Moms with kids 10 and under for the last 6 years. 2012 was the first time primary shoppers were also included, and done so to learn about the beliefs, attitudes and barriers to consuming all forms of fruits and vegetables of a larger segment of the United States population. Studies like these however are really only useful to the fruit and vegetable industry if they know what to do with the data. The overall key points from the survey are outlined below to help the industry understand how best to apply data from this survey.

<u>Definition of Survey Participants</u>

- Moms: has kids ≤ 10 years old. (N=700)
- Primary Shopper: the one member of the household purchasing the majority of food. May or may not have children. (N=600)
- Male Primary Shopper: ≥ 18, single or married. (N=300)
- Female Primary Shopper: ≥ 18, single or married. (N=300)
- Single Primary Shopper: ≥ 18, male or female (N=229)
- Married Primary Shopper: ≥ 18, male or female (N=851)
- Older Primary Shopper: ≥ 35, male or female (N=865)
- Younger Primary Shopper: < of 35, male or female (N=435)
- Lower Income Primary Shopper: annual income < $50,000, male or female (N=648)
- Higher Income Primary Shopper: annual income ≥ $50,000, male or female (N=652)

<u>Key Points from Survey Results</u>

- The majority of all survey participants are consuming, on average, ½ - 3 cups of fruits and vegetables daily.
    - A variety of factors determine the recommended daily consumption levels, but at a minimum the participants in this survey (which excluded children) should be consuming 5 cups daily.
    - The Male primary shopper, Single primary shopper, and Lower Income primary shoppers are less likely compared to the other groups (Female, Married, and Higher Income) to consume fruits and vegetables on a daily basis.

- Cost, taste, and freshness are the top three most important factors for Moms and all primary shoppers when shopping for fruit and vegetables.
    - The list of factors survey participants could rank, inclusive of freshness, were not defined. However, one can surmise that in the mind of the consumer, freshness is typically linked to fresh fruit and vegetables.
        - An education and marketing opportunity exists with Moms and all primary shoppers to:
            - Explain that 100% juice, canned, dried, and frozen fruit and vegetables begin as fresh and therefore have 'freshness.'
            - Cross-market and cross-promote mixing different forms of fruits and vegetables to make meals and snacks. Cost saving tips, greater variety of recipes (inclusive of new serving/cooking suggestions), knowledge of what's in season, and how to store fruit and vegetables are most important to all groups to help increase their purchase of and consumption of fruit and vegetables. Educating them on how frozen and canned, fresh and canned, dried and fresh, etc. can be combined into a recipe or snack will address all of the factors currently barring moms and all primary shoppers from buying and eating more fruit and vegetables.

- Moms and primary shoppers most commonly site the internet when wanting information on how to incorporate more fruit and vegetables into daily meals and snacks. Family is the second source of information for Moms. However, the second source of information for primary shoppers is a nutritionist or dietitian, especially for Male primary shoppers, Single primary shoppers, and Lower Income primary shoppers. Supermarkets were ranked 3rd as the resource for primary shoppers when wanting information.
    - Opportunities with the Internet
        - All groups want more recipes. No need to waste valuable resources to create and place new recipes on your site when there are over 1,000 recipes on www.FruitsAndVeggiesMoreMatters.org for consumers to choose from.
            - Simply link from your consumer site as a way to offer the consumer more information without incurring the expense.
            - Submit your recipes, with a color photo of the completed recipe, and PBH will post them in our recipe database with a credit line for your organization.
        - Similarly, in addition to recipes, other reported useful ideas to attain the goal of eating more fruits and vegetables for moms and primary shoppers includes learning cost saving tips, knowing how to store fruits and vegetables, knowing what's in season, learning new cooking techniques, and having new serving suggestions. Again, no need to waste resources for all of this information when all of this can be found at www.FruitsAndVeggiesMoreMatters.org
            - See tool kits at www.PBHFoundation.org
            - Other educational items at www.PBHCatalog.org

    - Opportunities with Nutritionists/Dietitians
        - An opportunity exists for members of the fruit and vegetable industry to work more with these professionals, inclusive of in-store dietitians.
        - An opportunity exists for members of the fruit and vegetable industry to work more closely with PBH, if not already doing so, to meet and access in-store dietitians and nutritionists.
        - Supermarkets with dietitians on staff should think of ways to maximize their knowledge and in-store presence, ESPECIALLY since supermarkets continue to be the most efficient food communication method to influence primary shopper purchases AND because all forms of fruits and vegetables are primarily purchased through grocery stores.
        - Nearly four out of ten (37%) primary shoppers need ideas about new ways to prepare fruits and vegetables. Yet shoppers currently go to the internet, cookbooks, friends, family, or magazines before they go to the grocery store to find *recipes*. An opportunity exists for supermarkets to share serving suggestions and recipes with shoppers: because shoppers *want* new ideas and because supermarkets are the most *effective* method cited by primary shoppers to create a food purchase.
        - Presumably, moms and Married primary shoppers have higher annual food purchases due to larger number of family members and Higher Income shoppers have more disposable income. Therefore, more time and attention should be paid to these shoppers to provide new menu ideas and cooking techniques.

- The Male primary shopper should be marketed to differently.
  - Compared to Female primary shoppers, they are ***more*** likely to:
    - Eat fruits and vegetables because of the energy provided [Female shoppers are more likely to say they eat them *to prevent weight gain*. *To stay healthy, like the taste*, and *part of a balanced diet* are still the top reasons for both Male and Female shoppers to eat fruits and vegetables],
    - Forget to buy fruits and vegetables and find receiving regular reminders useful,
    - Feel fruit is time consuming to purchase and prepare,
    - Purchase frozen, canned, and dried fruit more frequently,
    - Purchase dried vegetables, 100% vegetable juice, and vegetable purees more frequently,
    - Rely on a dietitian/nutritionist for getting information about eating more fruits and vegetables,
    - Absorb messages via radio commercial or text messages
    - Rank *healthy* as one of their top factors when shopping for fruits and vegetables [Female primary shoppers were more likely to rank *family preferences* as a top choice. Amongst both Male and Female primary shoppers, however, *cost, freshness*, and *taste* were the most important factors.]
  - Compared to Female primary shoppers, they are ***less*** likely to:
    - Use magazines as a way to get information about eating more fruits and vegetables,
    - Want to include more fruit and vegetables in meals or learn how to prepare them in new ways,
    - Say that eating fruits and vegetables each day is enjoyable
    - Ignore QR codes, text messages, and billboards,
    - Purchase a product based on a supermarket flyer or newspaper ad
  - Compared to other primary shopper groups and Moms, they purchase more fruit and vegetables at convenience stores and gas stations and spend less time making a dinner meal.
  - Far more Male shoppers (81%) than Female shoppers (59%) say that their spouse believes it is important that their children include fruits and vegetables at meals and snacks.

- Supermarket fliers and in-store signage/displays continue to be the most efficient communication method to influence all primary shoppers to purchase a product, particularly for the female primary shopper.
  - Supermarkets remain the top way Moms and all primary shoppers become aware of Fruits & Veggies—More Matters.
    - Since the supermarket so strongly influences purchase decisions, the more supermarkets use the Fruits & Veggies—More Matters logo in print and online circulars, in-store signage, and displays, the more Moms and all primary shoppers will learn about the health campaign and be influenced to buy more fruit and vegetables thereby increasing sales and consumption.
    - Currently 36% of Moms and 30% of primary shoppers believe Fruits & Veggies—More Matters motivates them to eat more fruits and vegetables. 77% of Moms believe a product is healthy and 69% believe it is nutritious when it carries the logo on package. 70% of primary shoppers believe a product is healthy and 56% believe it is nutritious when it carries the logo on package. (Men are ½ of the primary shopper group and pull the average down.)

- Regarding meal preparation, 84% of moms spend 30 minutes or more preparing a meal compared to only 67% of primary shoppers spending 30 minutes or more. The Single primary shopper, Lower Income primary shopper, and Younger primary shopper typically are more likely to spend less time preparing a meal than Married, Higher Income, and Older shoppers.

Frozen Fruit and Vegetables – Key Points

- For all primary shoppers, nearly 8 out of 10 (79%) have frozen vegetables available in the home while only 4 out of 10 (43%) have frozen fruit available in the home.
    - Married primary shoppers are more likely to have frozen fruits or vegetables in the home.
    - Most primary shoppers purchase frozen fruit and vegetables monthly, followed by weekly.
        - The Male primary shopper is more likely to purchase frozen fruit weekly compared to the Female primary shopper.
    - Female primary shoppers, Higher Income primary shoppers, and Older primary shoppers are more likely to have frozen vegetables in the home, while Younger primary shoppers are more likely to have frozen fruit in the home.
    - Older primary shoppers and Married primary shoppers are more likely to view frozen fruits and vegetables as healthy compared to Younger or Male shoppers.
    - Primary shoppers generally view frozen fruits and vegetables as less healthy than fresh, 100% juice, or pre-cut/pre-washed fresh fruits and veggies, but healthier than dried, freeze-dried, purees, or canned fruits and vegetables.

Frozen Fruit – Key Points

- If frozen fruit is not in the home, it is primarily because they don't use them (39%), or they are too expensive (32%). There is some concern among primary shoppers that frozen fruit has added preservatives (14%) or artificial ingredients (7%,) which isn't as high as canned fruit or 100% fruit juice. When asked if there are other reasons, some said they didn't like added sugar or the "mushiness" of thawed frozen fruit.

- Frozen fruit is primarily purchased by all groups because it is believed to:
    - Keep well (64%)
    - Easy to use (63%)
    - Healthy/Use in recipes (46%)
    - Taste good/Quick to Prepare (44%)
    - The Married primary shopper and Lower Income primary shopper are more likely to purchase because frozen fruit is believed to be 'healthy.'

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    - Taste good/Quick to Prepare (44%)
    - The Married primary shopper and Lower Income primary shopper are more likely to purchase because frozen fruit is believed to be 'healthy.'

- The majority of all primary shoppers report purchasing about the same amount of frozen fruit (71%) compared to one year ago; 13% report purchasing more; 17% report purchasing less.

- In the prior 6 months, Primary shoppers reported getting their frozen fruit from :
    - Grocery stores - 73%
    - Supercenters (like Wal-Mart, Meijer, SuperTarget) - 56%
    - Club stores (like BJ's, Sam's, Costco's) - 24%
    - Farmer's Market/Local fruit stand/Home Garden - 7%

- Availability of Frozen Fruit in the Home (Always to Usually Available)

Male	Female	Married	Single	Work Outside Home	Do Not Work Outside Home	Urban	Suburban	Rural
44%	41%	46%	43%	48%	40%	44%	45%	41%

HS or Less	College Grad or More	<$25K	25-49K	50-74K	75-99K	>$100K
40%	46%	37%	43%	44%	53%	49%

Ages 18-24	Ages 25-34	Ages 35-44	Ages 45-54	Ages 55+	North East	Mid West	South	West
51%	46%	43%	42%	42%	42%	43%	46%	45%

Frozen Vegetables – Key Points

- If frozen vegetables are not in the home, it is primarily because they don't use them (30%), don't like them (25%), they are too expensive (22%), or they believe they are less healthy (17%). There is some concern among primary shoppers that frozen vegetables have added preservatives (13%) or artificial ingredients (7%,) second only to canned vegetables. A small number indicate that they have limited freezer space.
  - Higher Income primary shoppers are more likely not to have frozen vegetables in the home because they believe they are less healthy.

- Frozen vegetables are primarily purchased by all groups because they are believed to:
  - Keep well (74%)
  - Easy to use (73%)
  - Quick to prepare (70%)
  - Compared to the Single primary shopper and Younger primary shoppers, Married primary shoppers and Older primary shoppers are more likely to purchase frozen vegetables because of the perceived quality. Older shoppers also rate frozen vegetables as more healthy and taste good than Younger shoppers.

- The majority of all primary shoppers report purchasing about the same amount of frozen vegetables (79%) compared to one year ago; 13% report purchasing more; 8% report purchasing less.

- In a similar pattern to frozen fruit, over the prior 6 months Primary shoppers reported getting their frozen vegetables from:
  - Grocery stores - 87%
  - Supercenters (like Wal-Mart, Meijer, SuperTarget) - 54%
  - Club stores (like BJ's, Sam's, Costco's) - 17%
  - Farmer's Market/Home Garden - 3%

- Availability of Frozen Vegetables in the Home (Always to Usually Available)

Male	Female	Married	Single	Work Outside Home	Do Not Work Outside Home	Urban	Suburban	Rural
75%	83%	84%	71%	84%	78%	77%	84%	79%

HS or Less	College Grad or More	<$25K	25-49K	50-74K	75-99K	>$100K
75%	84%	68%	78%	85%	88%	92%

Ages 18-24	Ages 25-34	Ages 35-44	Ages 45-54	Ages 55+	North East	Mid West	South	West
71%	79%	83%	84%	83%	82%	82%	82%	77%

- **Education and marketing opportunities** exist for frozen fruit and vegetables related to the following topics:
  - Healthfulness of frozen vegetables
  - How frozen fruit and vegetables can be used with other forms of fruit and vegetables in recipes and snacks