Research conducted by:

ON Research

On behalf of:

PRODUCE FOR BETTER HEALTH FOUNDATION:
Primary Shoppers/Moms with Kids 10 & Under Study

Report – *March 9, 2012*

Sponsored by:

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Objectives

Specific Research Objectives

- Gauge awareness and impressions of the "Fruits & Veggies – More Matters" campaign including the logo and website.
- Track the relationship of Moms with kids 10 & under with fruits and vegetables: attitudes, consumption habits, benefits and barriers.
- Track Primary Shoppers' relationship with fruits and vegetables and identify key significant differences compared to Moms' with kids 10 & under.

Methodological notes

•*Significant differences for tracking purposes are shown year over year.*

- *When data from a given wave (year) is significantly higher than that of the previous wave (year), it is noted by a green circle*
- *When data from a given wave (year) is significantly lower than the previous wave (year) it is noted by a red box*

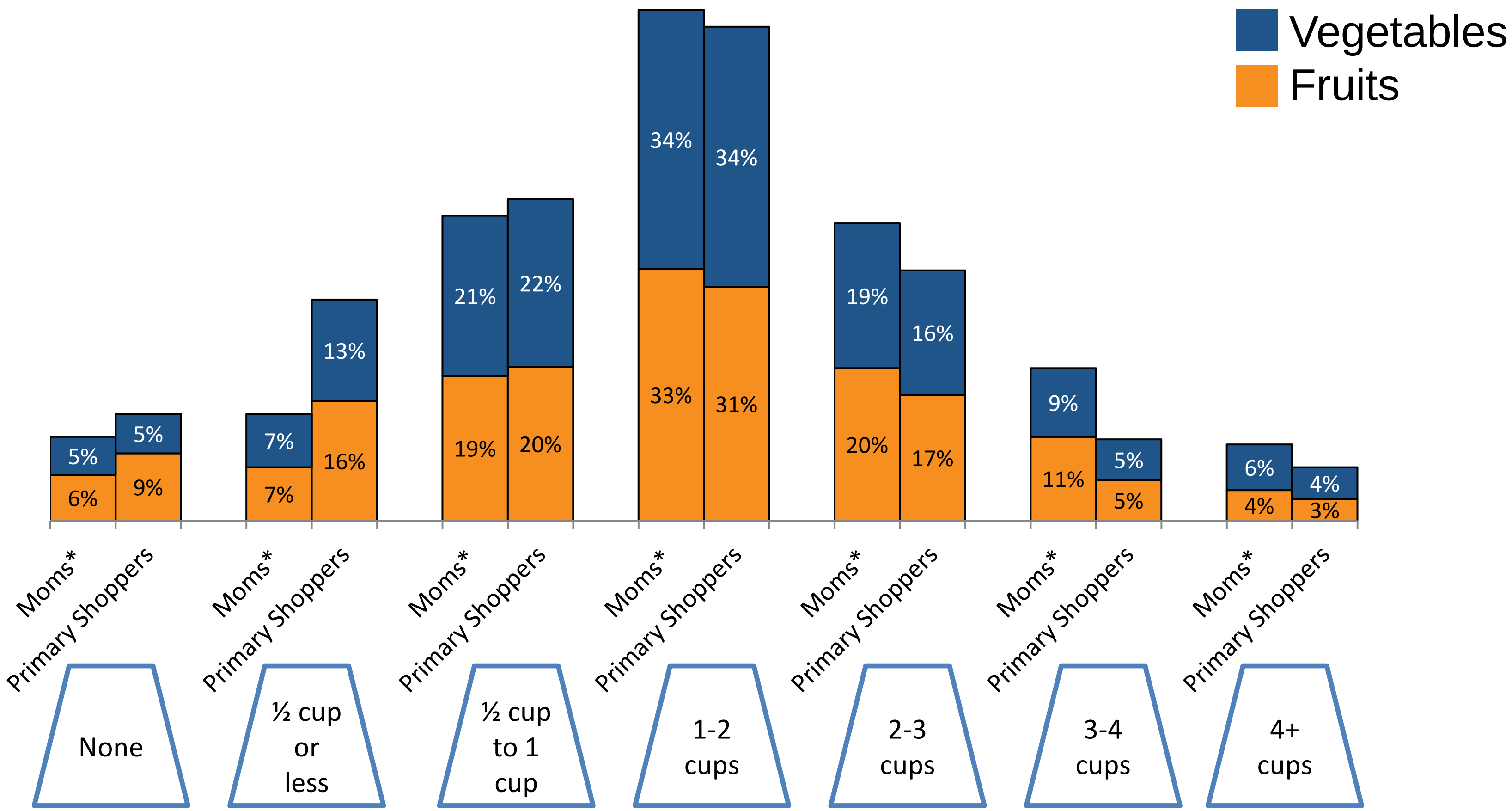
Methodology

METHODOLOGY							
Wave	Round 7 (2012)	Round 6 (2011)	Round 5 (2010)	Round 4 (2009)	Round 3 (2008)	Round 2 (2007)	Round 1 (2006)
Survey Type	Online survey conducted via an online panel	Online survey conducted via an online panel	Online survey conducted via an online panel	Online survey conducted via an online panel	Online survey conducted via an online panel	Online survey conducted via an online panel	Online survey conducted via an online panel
Fielding Period	January 23 – 31, 2012	January 14 – 31, 2011	January 15 – 29, 2010	January 16 – 22, 2009	January 18 – 22, 2008	February 2 – 9, 2007	October 3 – 5, 2006
Sample Size	n = 1300 (Moms with kids 10 and under n=700, Primary Shoppers n=600)	n = 1600 (n=300 oversample of lower income (<$25k) moms)	n = 1300	n = 1000	n = 1000	n = 1000	n = 550
Confidence Level (within year)	2.7 % (19/20 times)	2.4% (19/20 times)	2.7% (19/20 times)	3.1% (19/20 times)	3.1% (19/20 times)	3.1% (19/20 times)	4.2% (19/20 times)
Media Materials Used	Logo: Fruits & Veggies—More Matters™ **(3 versions)** ‘My Plate’ Logo	Logo: Fruits & Veggies—More Matters™ **(3 versions)**	Logo: Fruits & Veggies—More Matters™ **(3 versions)**	Logo: Fruits & Veggies—More Matters™ **(3 versions)**	Logos: Fruits & Veggies—More Matters™ 5-9 a Day	Logos: Fruits & Veggies—More Matters™ 5-9 a Day	None
RESPONDENT CRITERIA							
Geography	Residents of the United States	Residents of the United States	Residents of the United States	Residents of the United States	Residents of the United States	Residents of the United States	Residents of the United States
Gender	Male/ Female	Women only	Women only	Women only	Women only	Women only	Women only
Age	18 years old and older	“Generation X” - born between 1965 and 1979 “Generation Y” – born between 1980 and 1990	“Generation X” - born between 1965 and 1979 “Generation Y” – born between 1980 and 1990	“Generation X” - born between 1965 and 1979	“Generation X” - born between 1965 and 1979	“Generation X” - born between 1965 and 1981	“Generation X” - born between 1965 and 1981
Additional Criteria	Moms with kids 10 yrs old and younger Primary Shoppers	Must have children under the age of 18 living at home	Must have children under the age of 18 living at home	Must have children under the age of 18 living at home	Must have children under the age of 18 living at home	Must have children under the age of 18 living at home	Must have children under the age of 18 living at home

Consumption and Attitudes

Most Moms* and Primary Shoppers consume 1-2 cups of Fruits and Vegetables on a daily basis

Moms with kids 10 & under and Primary Shoppers Fruits and Vegetables Daily Consumption



* Moms with kids 10 & under n=700
Primary Shoppers n=600

% Respondents

Q9/ 11. About how many cups of fruit / vegetables do you eat or drink each day?

Primary Shoppers Daily Consumption of Fruits and Vegetables

The following statistically significant differences for the daily consumption of fruits and vegetables were found amongst the following Primary Shoppers groups:

Fruits

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to **not consume any** fruit each day (Male: 11% / Female: 6%).

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to **not consume any** fruit each day (Single: 21% / Married: 15%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to **not consume any** fruit each day (Lower Income: 10% / Higher Income: 4%).
- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to consume the following amounts of fruit each day:
  - **2-3 cups** (Higher Income: 21% / Lower Income: 16%);
  - **3-4 cups** (Higher Income: 10% / Lower Income: 7%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Older Primary Shoppers are more likely than Younger Primary Shoppers to consume **½ cup to 1 cup** of fruit each day (Older: 21% / Younger: 16%).
- Younger Primary Shoppers are more likely than Older Primary Shoppers to consume **2-3 cups** of fruit each day (Younger: 23% / Older 16%).

Vegetables

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to **not consume any** vegetables each day (Male: 8% / Female: 2%).
- Female Primary Shoppers are more likely than Male Primary Shoppers to consume **3-4 cups** of vegetables each day (Female: 7% / Male: 3%).

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to consume the following amounts of vegetables each day:
  - **not consume any** vegetables each day (Single: 8% / Married: 4%);
  - **½ cup or less** each day (Single: 14% / Married: 8%).

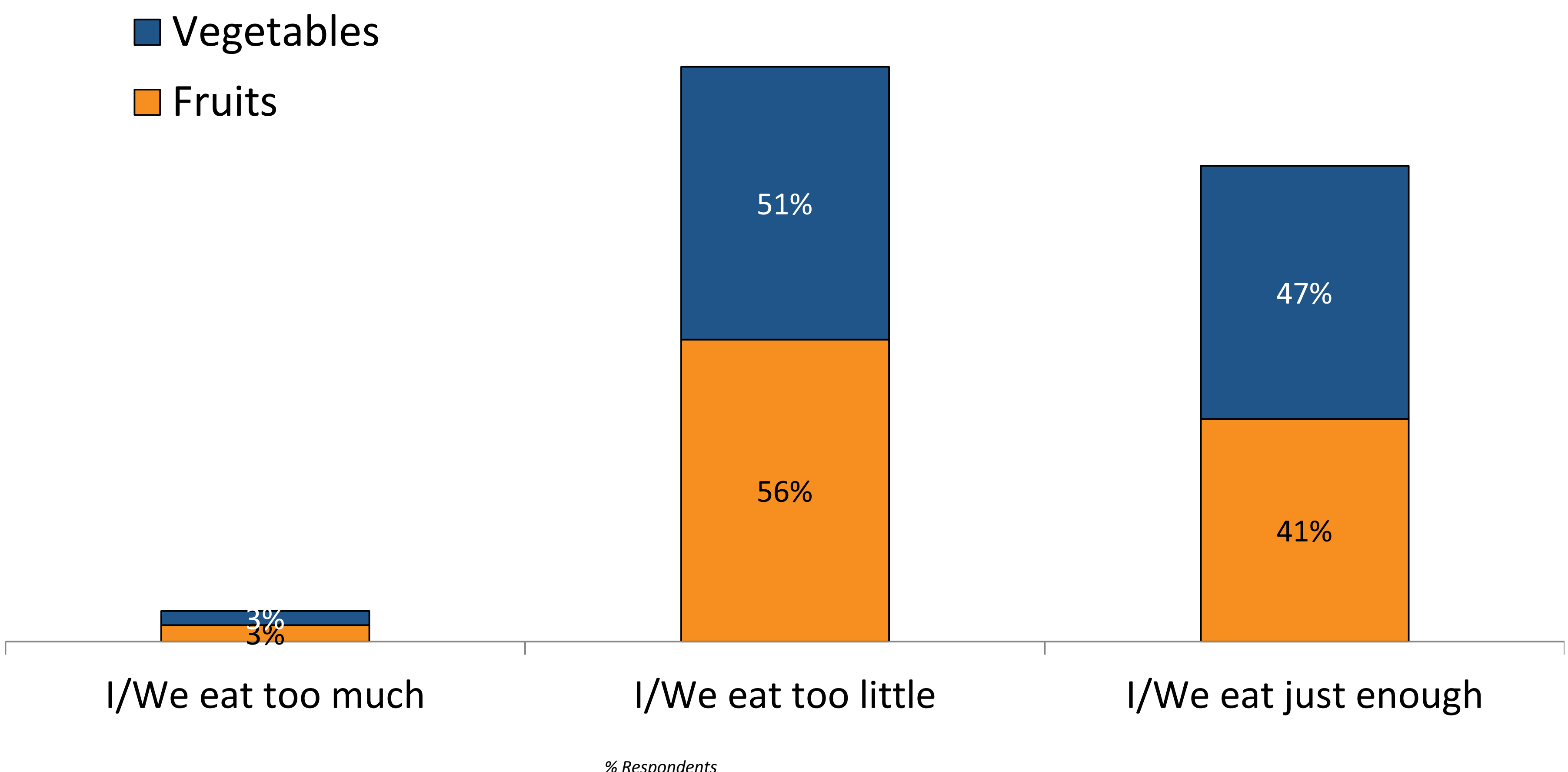
Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to the following amounts of vegetables each day:
  - **not consume any** vegetables each day (Lower Income: 7% / Higher Income: 3%);
  - **½ cup or less** (Lower Income: 12% / Higher Income: 8%);
- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to consume the following amounts of vegetables each day:
  - **1-2 cups** (Higher Income: 37% / Lower Income: 31%);
  - **4 cups or more** (Higher Income: 6% / Lower Income: 4%).

Q9 / 11. About how many cups of fruit / vegetables do you eat or drink each day?

More than half of Primary Shoppers perceive they eat too little fruits and vegetables

Primary Shoppers perceptions of their fruits and vegetables consumption



Primary Shoppers n=600

Q14. Which of these statements best represents you or your family's eating habits for each of the following?

Primary Shoppers and Family Eating Habits

The following statistically significant differences the family's eating habits for Primary Shoppers and their families' habits were found amongst the following Primary Shoppers groups:

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to agree that:
  - **I/We Eat too much Fruits** (Single: 7% / Married: 3%);
  - **I/We Eat too much Vegetables** (Single: 7% / Married: 2%).
- Married Primary Shoppers are more likely than Single Primary Shoppers to agree that **I/We eat just enough vegetables (including salads)** (Married: 43% / Single: 36%).

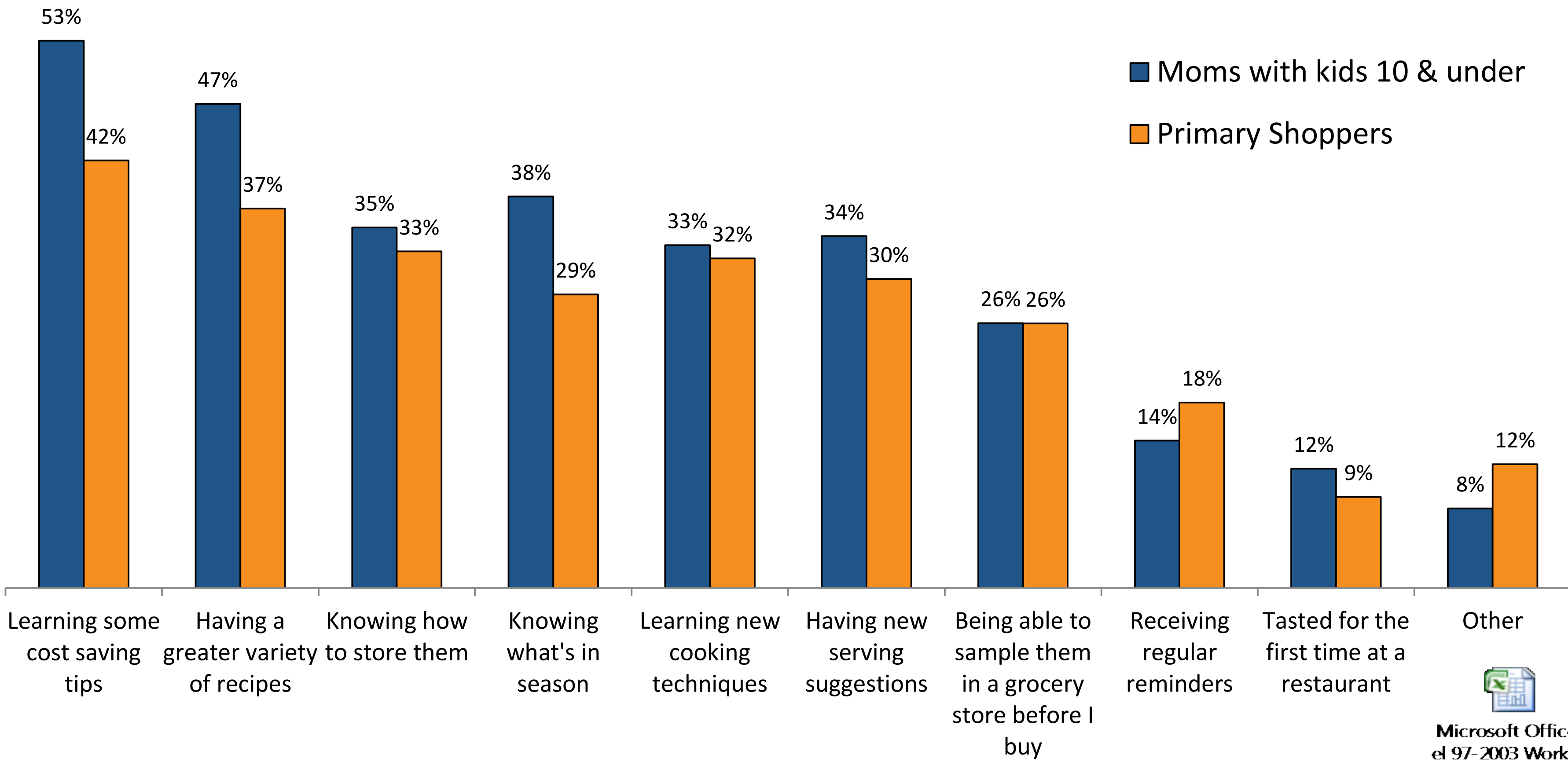
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to agree that**:**
  - **I/We Eat too much Fruits** (Younger: 7% / Older: 2%);
  - **I/We Eat too much Vegetables** (Younger: 5% / Older: 2%).

Q14. Which of these statements best represents you or your family's eating habits for each of the following?

Moms* and Primary Shoppers believe learning cost saving tips is most useful in helping them attain their goal of eating their recommended fruits and vegetables

Perceived most useful tips to help Moms and Primary Shoppers attain their goal of eating their recommended Fruits and Vegetables



Click on Excel file for "Other" Responses

% Respondents

** Moms with Kids 10 & under: n= 700*
Primary Shoppers n=600

Q15: What is most useful to help attain goal of eating recommended FV?

Most Useful Tip to Attain the Recommended Fruits and Vegetables

The following statistically significant differences for what is most useful to help them attain the recommended amount of fruits and vegetables were found amongst the following Primary Shoppers groups:

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to find **receiving regular reminders** to be most useful(Male: 23% / Female: 13%).

Married vs. Single Primary Shoppers

- Married Primary Shoppers are more likely than Single Primary Shoppers to find **having new serving suggestions** to be most useful (Married: 34% / Single: 25%).
- Single Primary Shoppers are more likely than Married Primary Shoppers to find **receiving regular reminders** to be most useful (Single: 21% / Married: 15%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to find **having new serving suggestions** to be most useful (Lower Income: 35% / Higher Income: 29%).

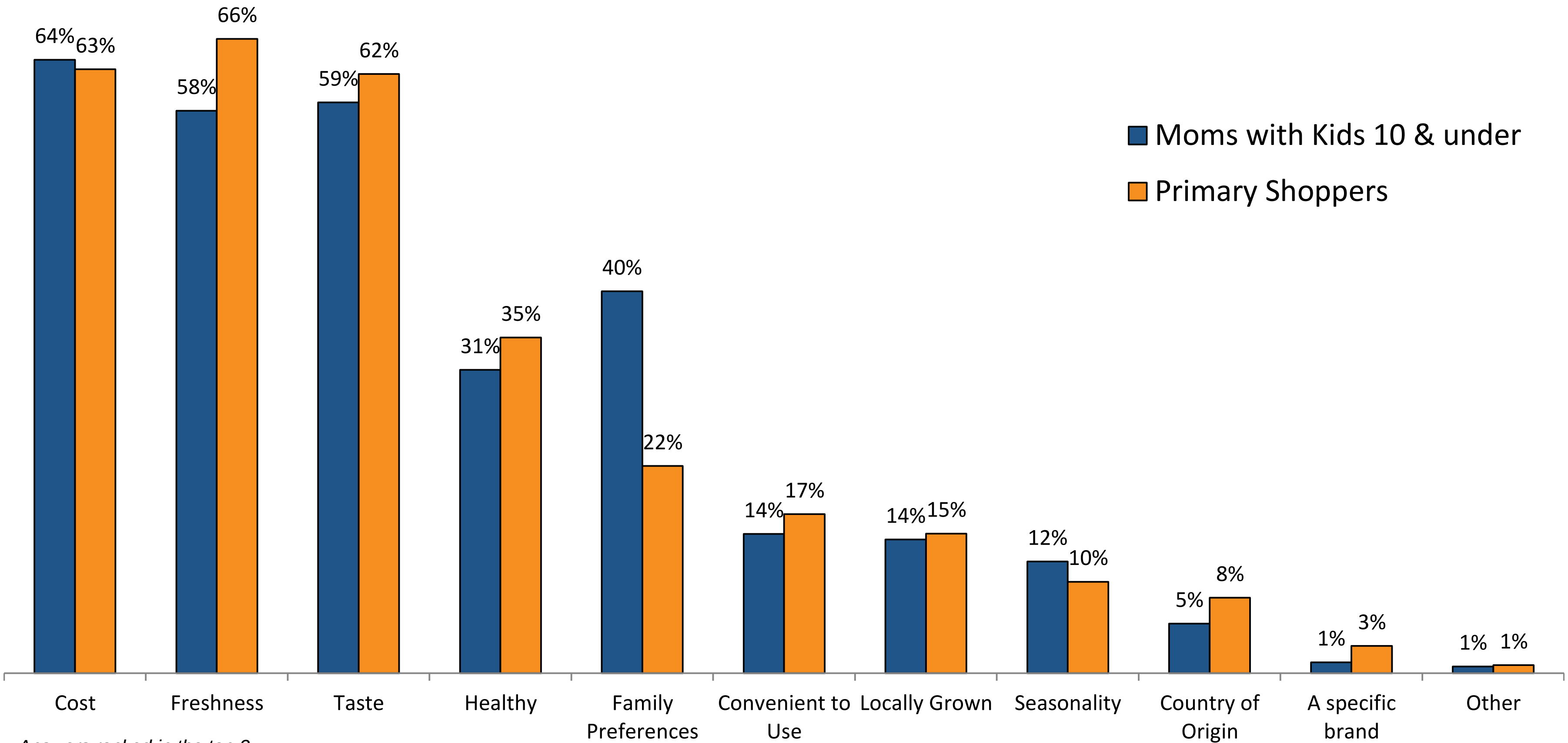
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to find the following to be most useful:
  - **Learning some cost saving tips** (Younger: 54% / Older: 45%);
  - **Having a greater variety of recipes** (Younger: 53% / Older: 37%);
  - **Learning new cooking techniques** (Younger: 43% / Older: 27%);
  - **Knowing what's in season** (Younger: 41% / Older: 30%).

Q15: What is most useful to help attain goal of eating recommended FV?

Cost is the most important factor when shopping for Fruits and Vegetables for Moms*, while Freshness is most important for Primary Shoppers

Factors Of Importance When Shopping For Fruits And Vegetables



Answers ranked in the top 3

% Respondents

** Moms with Kids 10 & under: n= 699*
Primary Shoppers n=600

Q16: When shopping for FV, these factors are most important to me ? (Please rank your top 3 choices)
For Example: 1 = First choice, 2 = Second choice, 3 = Third choice

Factors Ranked in the Top 3 in terms of importance when shopping for Fruits and Vegetables

The following statistically significant differences for the factors that are considered to be ranked in the top 3 in terms of importance when shopping for Fruits and Vegetables were found amongst the following Primary Shoppers groups:

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to rank the following factors in their top 3:
  - **Healthy** (Male: 39% / Female: 31%);
  - **A special brand** (Male: 4% / Female: 1%).
- Female Primary Shoppers are more likely than Male Primary Shoppers to rank **Family Preferences** in their top 3 (Female: 26% / Male: 17%).

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to rank **Healthy** in their top 3 (Single: 40% / Married: 31%).
- Married Primary Shoppers are more likely than Single Primary Shoppers to rank **Family Preferences** in their top 3 (Married: 35% / Single: 20%).

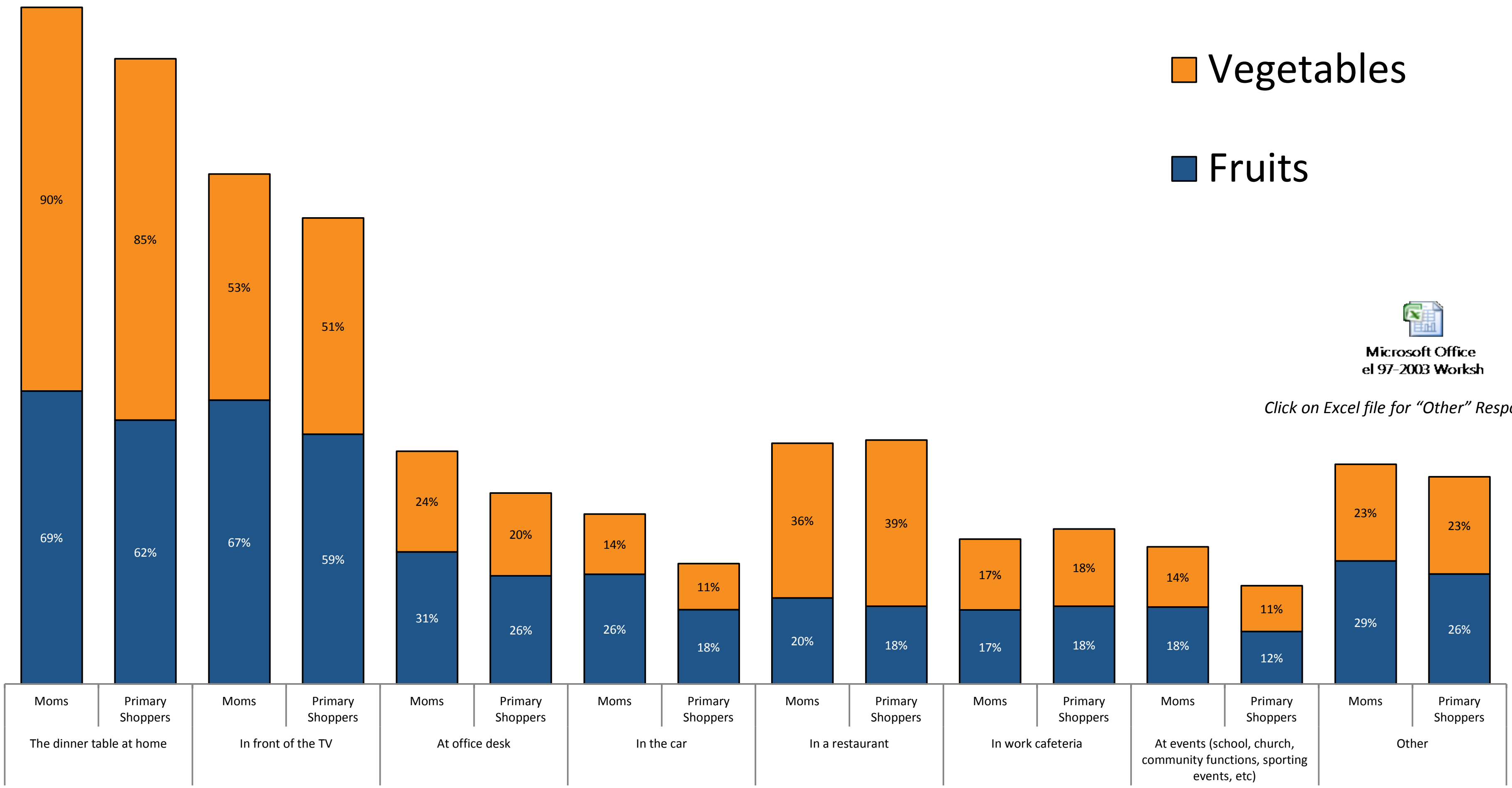
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to rank the following factors in their top 3:
  - **Taste** (Younger: 65% / Older: 58%);
  - **Healthy** (Younger: 38% / Older: 31%);
- Older Primary Shoppers are more likely than Younger Primary Shoppers to rank the following factors in their top 3:
  - **Family Preferences** (Older: 33% / Younger: 27%);
  - **Locally Grown** (Older: 15% / Younger: 12%).

Q16: When shopping for FV, these factors are most important to me ? (Please rank your top 3 choices)
For Example: 1 = First choice, 2 = Second choice, 3 = Third choice

The most common location to eat fruits and vegetables on a weekly basis is again at the dinner table at home

Frequency of fruit/vegetables consumptions in each of the following locations (Weekly basis or more often)



Click on Excel file for "Other" Responses

Moms with kids 10 and under n= 700
Primary Shoppers n=600

Q20 & Q21: How often do you consume fruit/vegetables in each of the following locations

Locations where Fruit and Vegetables are Consumed Weekly or More Often

The following statistically significant differences for the locations where fruits and vegetables are consumed weekly or more were found amongst the following Primary Shoppers groups:

Fruits

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to consume fruit **in a restaurant** (Male: 22% / Female: 15%).

Married vs. Single Primary Shoppers

- Married Primary Shoppers are more likely than Single Primary Shoppers to consume fruit **at the dinner table at home** (Married: 68% / Married: 56%).
- Single Primary Shoppers are more likely than Married Primary Shoppers to consume the fruits in the following locations:
  - **Work cafeteria** (Single: 25% / Married: 18%);
  - **At events** (Single: 23% / Married: 15%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to consume fruit in the following locations:
  - **The dinner table at home** (Higher Income: 70% / Lower Income: 62%);
  - **In front of the TV** (Higher Income: 67% / Lower Income: 60%);
  - **At the office desk** (Higher Income: 36% / Lower Income: 21%);
  - **In the car** (Higher Income: 26% / Lower Income: 18%);
  - **In work cafeteria** (Higher Income: 21% / Lower Income: 14%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to consume fruit in the following locations:
  - **At the office desk** (Younger: 34% / Older: 26%);
  - **In the car** (Younger: 29% / Older: 19%);
  - **In a restaurant** (Younger: 25% / Older: 17%);
  - **In work cafeteria** (Younger: 26% / Older: 14%);
  - **At events** (Younger: 24% / Older: 11%).

Vegetables

Married vs. Single Primary Shoppers

- Married Primary Shoppers are more likely than Single Primary Shoppers to consume vegetables **at the dinner table at home** (Married: 91% / Single: 76%).
- Single Primary Shoppers are more likely than Married Primary Shoppers to consume vegetables in the following locations:
  - **At the office** (Single: 29% / Married: 22%);
  - **In the work cafeteria** (Single: 26% / Married: 18%);
  - **In the car** (Single: 21% / Married: 11%);
  - **At events** (Single: 19% / Married: 12%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to consume vegetables in the following locations:
  - **At the dinner table** (Higher Income: 92% / Lower Income: 84%);
  - **In a restaurant** (Higher Income: 44% / Lower Income: 31%);
  - **At the office** (Higher Income: 27% / Lower Income: 16%);
  - **In work cafeteria** (Higher Income: 20% / Lower Income: 15%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to consume vegetables in the following locations:
  - **At the office** (Younger: 27% / Older: 19%);
  - **In the work cafeteria** (Younger: 25% / Older: 13%);
  - **In the car** (Younger: 20% / Older: 9%);
  - **At events** (Younger: 20% / Older: 9%).
- Older Primary Shoppers are more likely than Younger Primary Shoppers to consume vegetables **at the dinner table at home** (Older: 91% / Younger: 83%).

Q20 / Q21: How often do you consume fruit / vegetables in each of the following locations (Weekly or More)

For Primary Shoppers, cost and different preferences are the leading causes of difficulty with respect to including fruit and vegetables in meals

Level of agreement in relation to difficulty of including vegetables and fruits in meals and snacks

Q119. Please indicate your level of agreement or disagreement in relation to how difficult each is for you personally to include fruits and vegetables in meals and snacks.

Difficulty of Including Fruits and Vegetables in Their Meals and Snacks

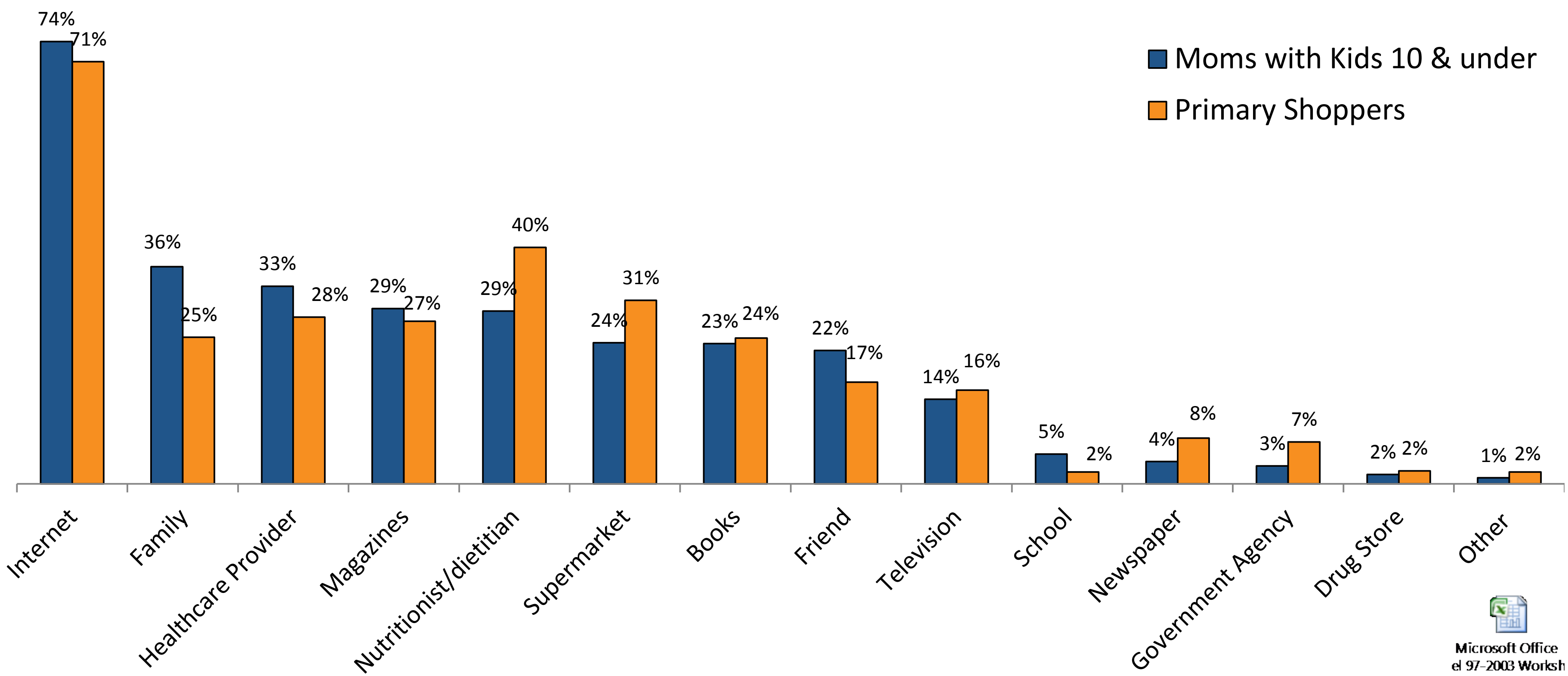
The following statistically significant differences were found amongst the following Primary Shoppers groups who agree or disagree that it is personally difficult for them to include fruits and vegetables in meals and snacks:

Agree	Disagree
Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to agree it is difficult because: ➢ **I forget to buy them** (Male: 22% / Female: 12%); ➢ **Fruit is time consuming to purchase and prepare** (Male: 19% / Female: 10%); ➢ **Fruit is not appetizing** (Male: 11% / Female: 3%). **Married vs. Single Primary Shoppers** ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to agree it is difficult because: ➢ **I forget to buy them** (Single: 22% / Married: 15%); ➢ **Vegetables are not appetizing** (Single: 22% / Married: 16%). **Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers** ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to agree it is difficult because: ➢ **Fruit is too expensive** (Lower Income: 51% / Higher Income: 43%); ➢ **Vegetables are too expensive** (Lower Income: 42% / Higher Income: 35%); ➢ **I forget to buy them** (Lower Income: 18% / Higher Income: 14%). **Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers** ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to agree that it is difficult because: ➢ **I need ideas about new ways to prepare fruits and vegetables** (Younger: 54% / Older: 37%); ➢ **Vegetables are too expensive** (Younger: 42% / Older: 36%); ➢ **I'm enticed by other foods instead** (Younger: 42% / Older: 34%); ➢ **They go bad before I can eat them** (Younger: 46% / Older: 31%); ➢ **There is not a good range of fruits and vegetables available in restaurants** (Younger: 40% / Older: 33%). ➢ **Quality fruits and vegetables are not available in local stores** (Younger: 26% / Older: 17%); ➢ **I forget to buy them**(Younger: 21% / Older: 14%); ➢ **Vegetables are not appetizing** (Younger: 25% / Older: 12%); ➢ **Fruit is time consuming to purchase and prepare** (Younger: 20% / Older: 14%); ➢ **Fruit is not appetizing** (Younger: 13% / Older: 5%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to disagree it is difficult because: ➢ **Fruit is not is not appetizing** (Female: 87% / Male: 82%) ➢ **Vegetables are not appetizing** (Female: 72% / Male: 60%) ➢ **I forget to buy them** (Female: 69%: / Male: 53%); ➢ **Fruit is time consuming to purchase and prepare** (Female: 69% / Male: 50%); ➢ **Vegetables are time consuming to purchase and prepare** (Female: 58% / Male: 47%). **Married vs. Single Primary Shoppers** ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to disagree it is difficult because: ➢ **Fruit is not appetizing** (Married: 82% / Single: 71%); ➢ **Vegetables are not appetizing** (Married: 66% / single: 55%) ➢ **I forget to buy them** (Married: 63% / 53%); ➢ **Fruit is time consuming to purchase and prepare** (Married: 60% / Single: 51%); ➢ **Vegetables are time consuming to purchase and prepare** (Married: 53% / Single: 43%); ➢ **Vegetables are too expensive** (Married: 34% / Single: 27%); ➢ **I'm enticed by other foods instead** (Married: 34% / Single: 26%). **Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers** ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to disagree it is difficult because: ➢ **Vegetables are not appetizing** (Higher Income: 67% / Lower Income: 62%); ➢ **I forget to buy them** (Higher Income: 66% / Lower Income: 58%); ➢ **Vegetables are too expensive** (Higher Income: 35% / Lower Income: 31%) **Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers** ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to disagree that it is difficult because: ➢ **Fruit is not appetizing** (Older: 84% / Younger: 72%); ➢ **Vegetables are not appetizing** (Older: 70% / Younger: 54%); ➢ **I forget to buy them** (Older: 65% / Younger: 56%); ➢ **Fruit is time consuming to purchase and prepare** (Older: 63% / Younger: 51%); ➢ **Quality fruits and vegetables are not available in local stores** (Older: 56% / Younger: 48%); ➢ **Vegetables are time consuming to purchase and prepare** (Older: 56% / Younger: 44%); ➢ **They go bad before I can eat them** (Older: 40% / Younger: 34%); ➢ **There is not a good range of fruits and vegetables available in restaurants** (Older: 36% / Younger: 31%); ➢ **I need ideas about new ways to prepare fruits and vegetables** (Older: 31% / Younger: 21%);

Q119. Please indicate your level of agreement or disagreement in relation to how difficult each is for you personally to include fruits and vegetables in meals and snacks.

The Internet is the most widely used source of information to get information on how to get their families to eat more Fruits & Vegetables

Sources of information consulted to get information on how to get families to eat more fruits and vegetables



Microsoft Office
el 97-2003 Worksh

Click on Excel file for "Other" Responses

% Respondents

Moms with Kids 10 & under: n= 700
Primary Shoppers n=600

Q122: *If you wanted information about how to get your family to eat more fruits and vegetables, where would you go to obtain it? (Please rank your top 3 choices) For Example: 1 = First choice, 2 = Second choice, 3 = Third choice*

Information Sources Ranked in the Top 3 for obtaining information on how to get families to eat more fruits and vegetables

The following statistically significant differences were found amongst the following Primary Shoppers groups for information sources that are ranked in the top 3 in terms of importance for getting information on eating more fruits and vegetables

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to rank **Nutritionist/Dietitian** in the top 3 (Male: 44% / Female: 35%).
- Female Primary Shoppers are more likely than Male Primary Shoppers to rank **Magazines** in their top 3 (Female: 35% / Male: 19%).

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to rank **Nutritionist/Dietitian** in their top 3 (Single: 39% / Married: 32%).
- Married Primary Shoppers are more likely than Single Primary Shoppers to rank **Magazines** in their top 3 (Married: 30% / Single: 20%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to rank the following information sources in their top 3:
  - **Nutritionist/Dietitian** (Lower: 37% / Higher: 31%);
  - **Family** or **Healthcare Provider** (Lower: 33% / Higher: 28%);
- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to rank the following information sources in their top 3:
  - **Internet** (Higher: 75% / Lower: 69%);
  - **Magazines** (Higher: 32% / Lower: 25%);
  - **Books** (Higher: 26% / Lower: 21%).

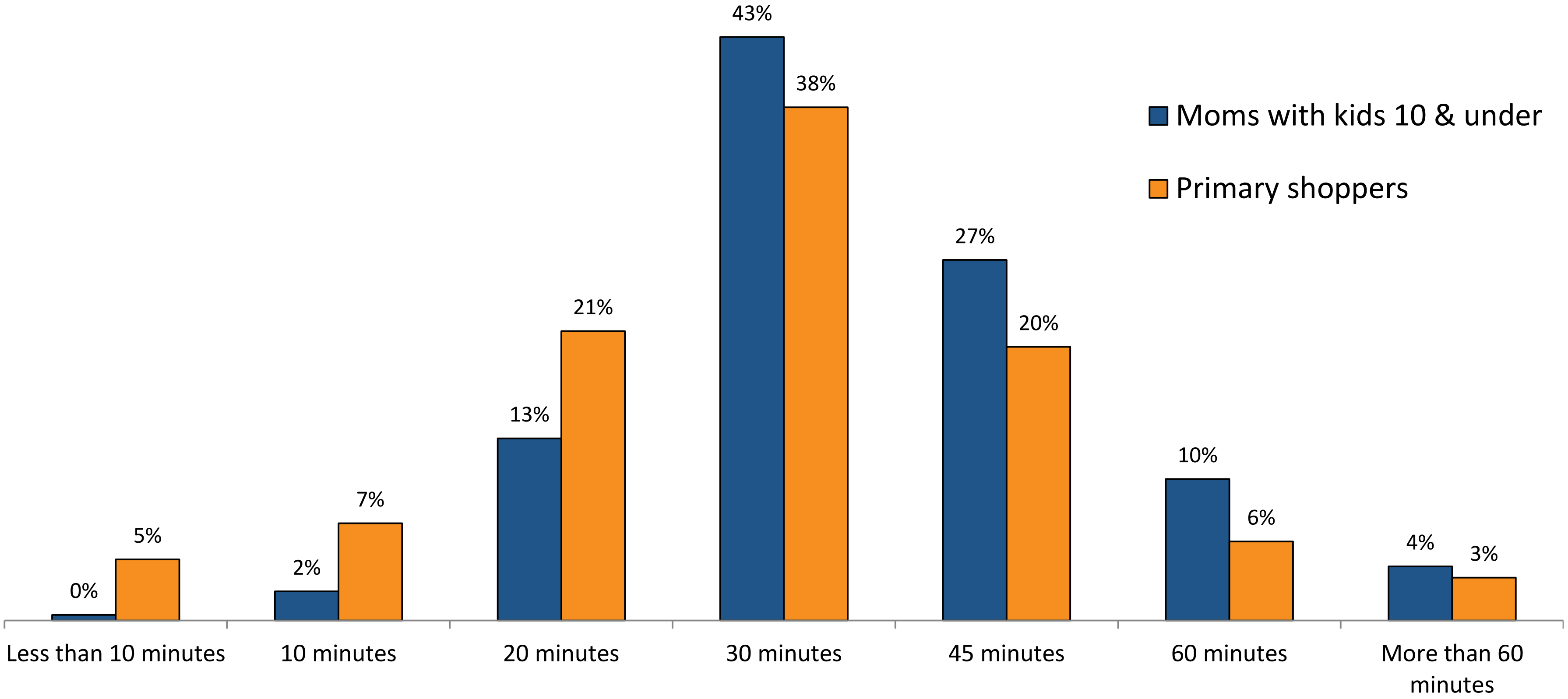
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to rank the following information sources in their top 3:
  - **Family** (Younger: 35% / Older: 29%);
  - **Friend** , **School**, or **Government Agency** (Younger: 23% / 18%);
  - **Television** (Younger: 18% / Older: 13%);
- Older Primary Shoppers are more likely than Younger Primary Shoppers to rank the following information sources in their top 3:
  - **Nutritionist/Dietitian** (Older: 36% / Older: 29%);
  - **Magazines** (Older: 31% / Older: 23%);
  - **Newspapers** (Older: 7% / Younger: 3%).

Q122: If you wanted information about how to get your family to eat more fruits and vegetables, where would you go to obtain it? (Please rank your top 3 choices) For Example: 1 = First choice, 2 = Second choice, 3 = Third choice

Moms with kids 10 & under spend more time preparing a dinner meal than the average Primary Shopper

Time spent making a dinner meal



Moms with Kids 10 & under: n= 700
Primary Shoppers n=600

% Respondents

Q107: On average, how much time do you spend making a dinner meal?

Time Spent Making a Dinner Meal

The following statistically significant differences were found amongst the following Primary Shoppers groups for the time spent making a dinner meal:

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to spend 20 minutes or less on making a dinner meal:
  - **20 minutes** (Single: 22% / Married: 15%);
  - **10 minutes** (Single: 12% / Married: 2%);
  - **Less than 10 minutes** (Single: 6% / Married: 1%).
- Married Primary Shoppers are more likely than Single Primary Shoppers to spend 30 minutes or more on making a dinner meal:
  - **30 minutes** (Married: 44% / Single: 34%);
  - **45 minutes** (Married: 25% / Single: 17%);
  - **60 minutes** (Married: 10% / Single: 5%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

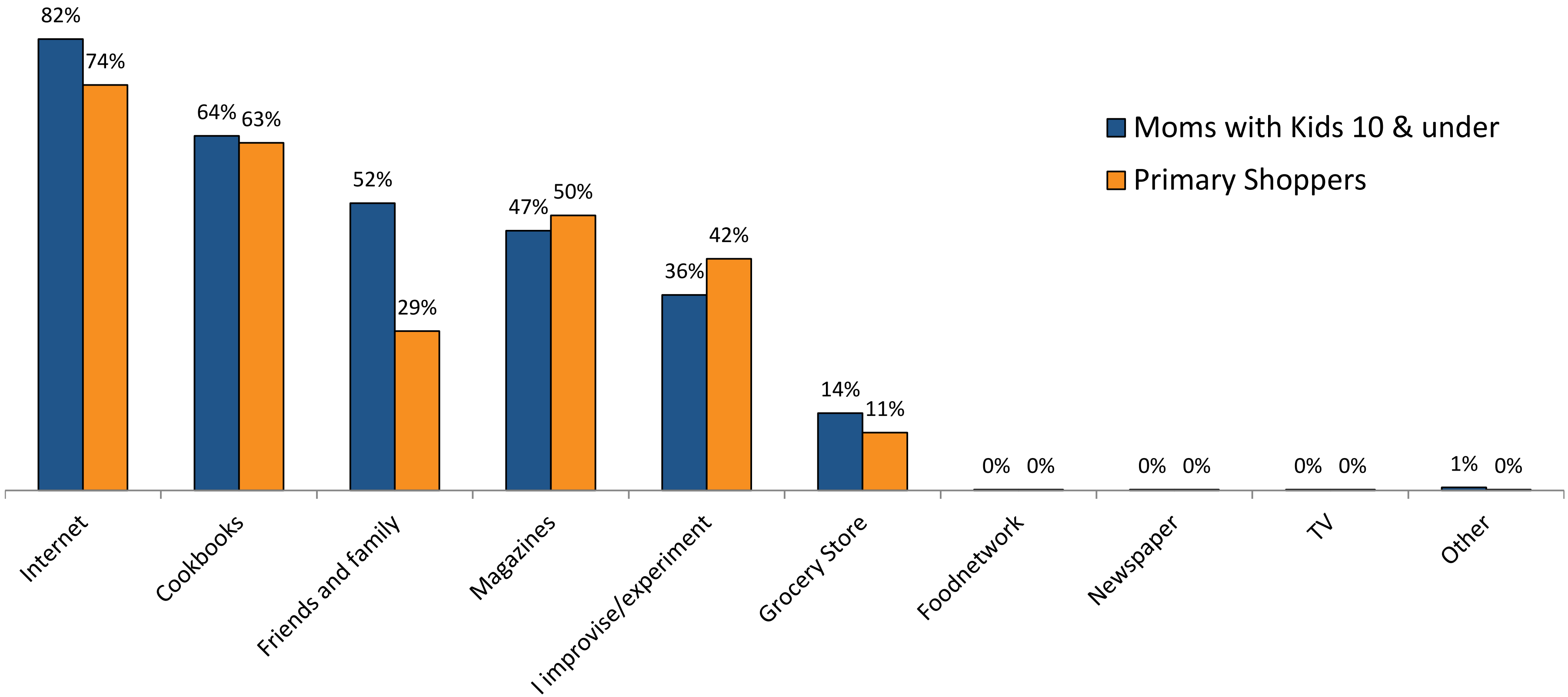
- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to spend less than 10 minutes on making a dinner (Lower: 3% / Higher: 1%).
- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to spend 30 minutes on making a dinner meal (Higher: 45% / Lower: 36%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to spend 10 minutes on making a dinner meal (Younger: 7% / Older: 3%).

The internet is the most popular source to find recipes, and is more widely used by Moms with Kids 10 and under

Sources of information to find recipes



Moms with Kids 10 & under: n= 540
Moms Primary Shoppers n=38

% Respondents

Q109: Where do you normally go to find recipes?

Recipe Sources

The following statistically significant differences were found amongst the following Female Primary Shoppers groups for recipe sources:

Married vs. Single Female Primary Shoppers

- Married Female Primary Shoppers are more likely than Single Female Primary Shoppers to use **cookbooks** (Married: 66% / Single: 49%).
- Single Female Primary Shoppers are more likely than Married Female Primary Shoppers to find recipes in the **Grocery Stores** (Single: 24% / Married: 13%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Higher Income Female Primary Shoppers are more likely than Lower Income Female Primary Shoppers to use the **Internet** to find recipes (Higher: 85% / Lower: 78%).

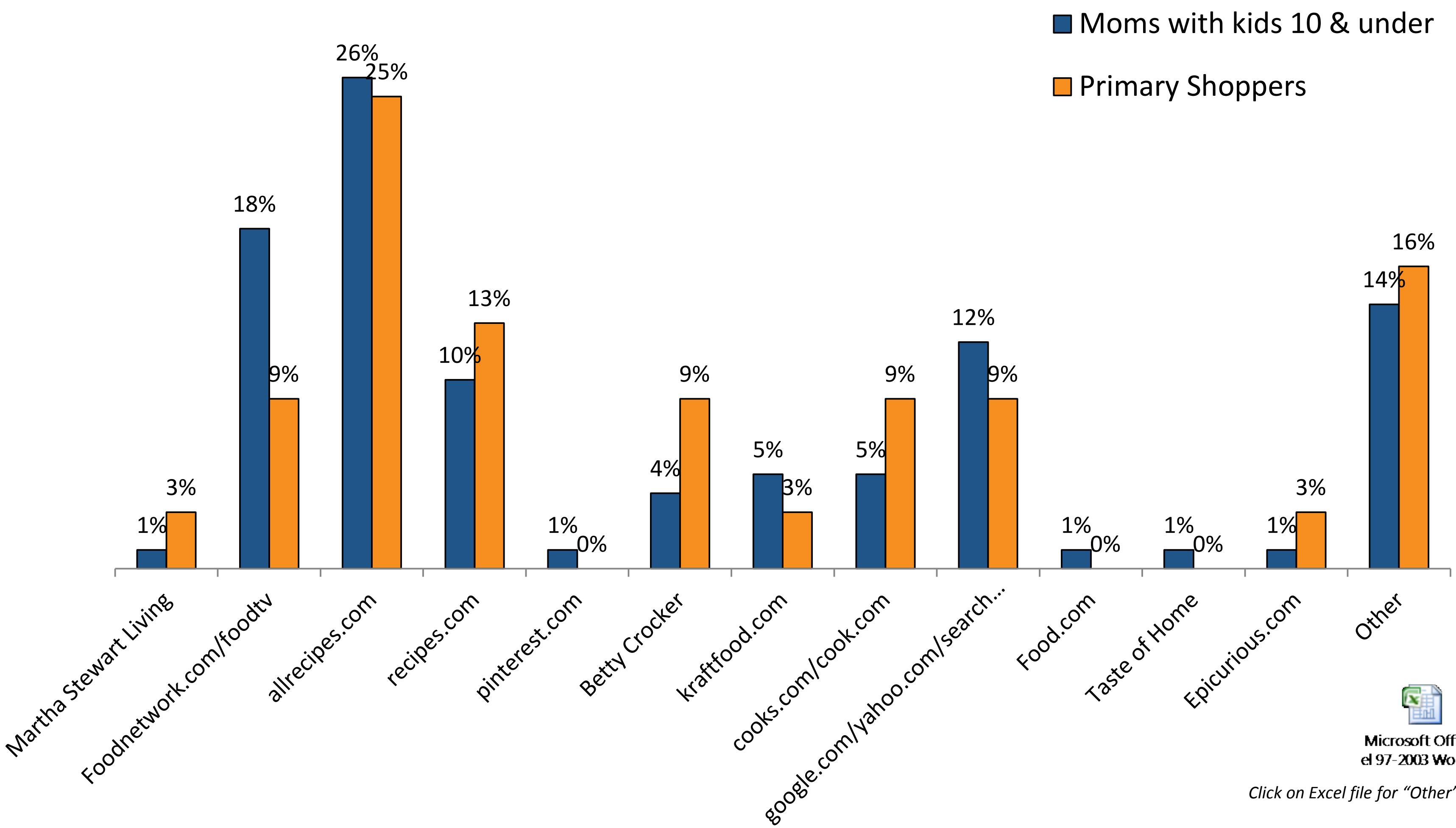
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Older Female Primary Shoppers are more likely than Younger Female Primary Shoppers to use **cookbooks** (Older: 68% / Younger: 55%).

Q110: Where do you normally go to find recipes?

Allrecipes.com is the most consulted site for recipes

Sources of information to find recipes



Microsoft Office
el 97-2003 Worksh

Click on Excel file for "Other" Responses

Moms with Kids 10 & under: n= 468
Moms who are Primary Shoppers n=32

Q109: What websites do you normally visit?

Websites Used to Find Recipes

The following statistically significant differences were found amongst the following Primary Shoppers groups will visit the following websites:

Married vs. Single Primary Shoppers

- Married Primary Shoppers are more likely than Single Primary Shoppers to visit **allrecipes.com** (Married: 36% / Single: 17%).
- Single Primary Shoppers are more likely than Married Primary Shoppers to use **google.com/yahoo.com/search engine** (Single: 30% / Married: 13%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to use **google.com/yahoo.com/search engine** (Lower: 19% / Higher: 12%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

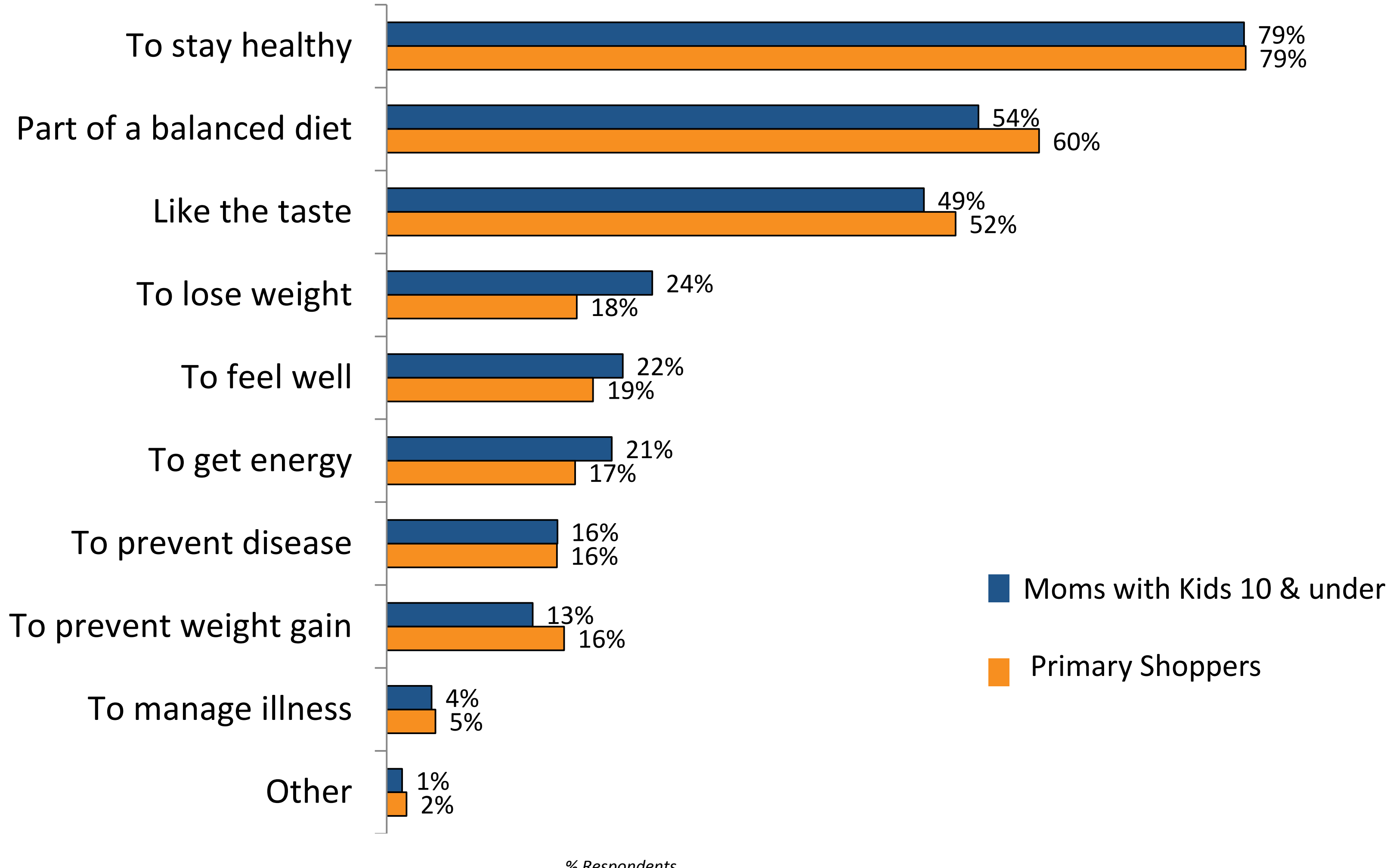
- Younger Primary Shoppers are more likely than Older Primary Shoppers to use **google.com/yahoo.com/search engine** (Younger: 20% / Older: 11%).
- Older Primary Shoppers are more likely than Younger Primary Shoppers to use :
  - **Foodnetwork.com/Food TV** (Older: 26% / Older: 17%);
  - **Kraftsfoods.com** (Older: 9% / Younger: 4%).

Q110: What websites do you normally use? (Base: All mothers)

Benefits

Respondents primarily eat fruits and vegetables to stay healthy, and because they are part of a balanced diet

Most important reasons why Moms with kids 10 & under and Primary Shoppers eat fruits and vegetables.



Moms with Kids 10 & under: n= 700
Primary Shoppers n=600

Q116. Please select up to three of the most important reasons why you, yourself, eat fruits and vegetables.

Beneficial Reasons for Eating Fruits and Vegetables

The following statistically significant differences were found amongst the following Primary Shoppers groups for the beneficial reasons for eating fruits and vegetables:

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely to eat fruits and vegetables than Female Primary Shoppers because they provide Energy (Female: 13% / Male: 22%)

Married vs. Single Primary Shoppers

- Married Primary Shoppers are more likely than Single Primary Shoppers to eat fruits and vegetables as part of a balanced diet(Married: 58% / Single: 45%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to eat fruits and vegetables because they like the taste of them (Lower: 60% / Higher: 45%);
- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to eat fruits and vegetables as part of balanced diet (Higher: 60% / Lower: 54%);

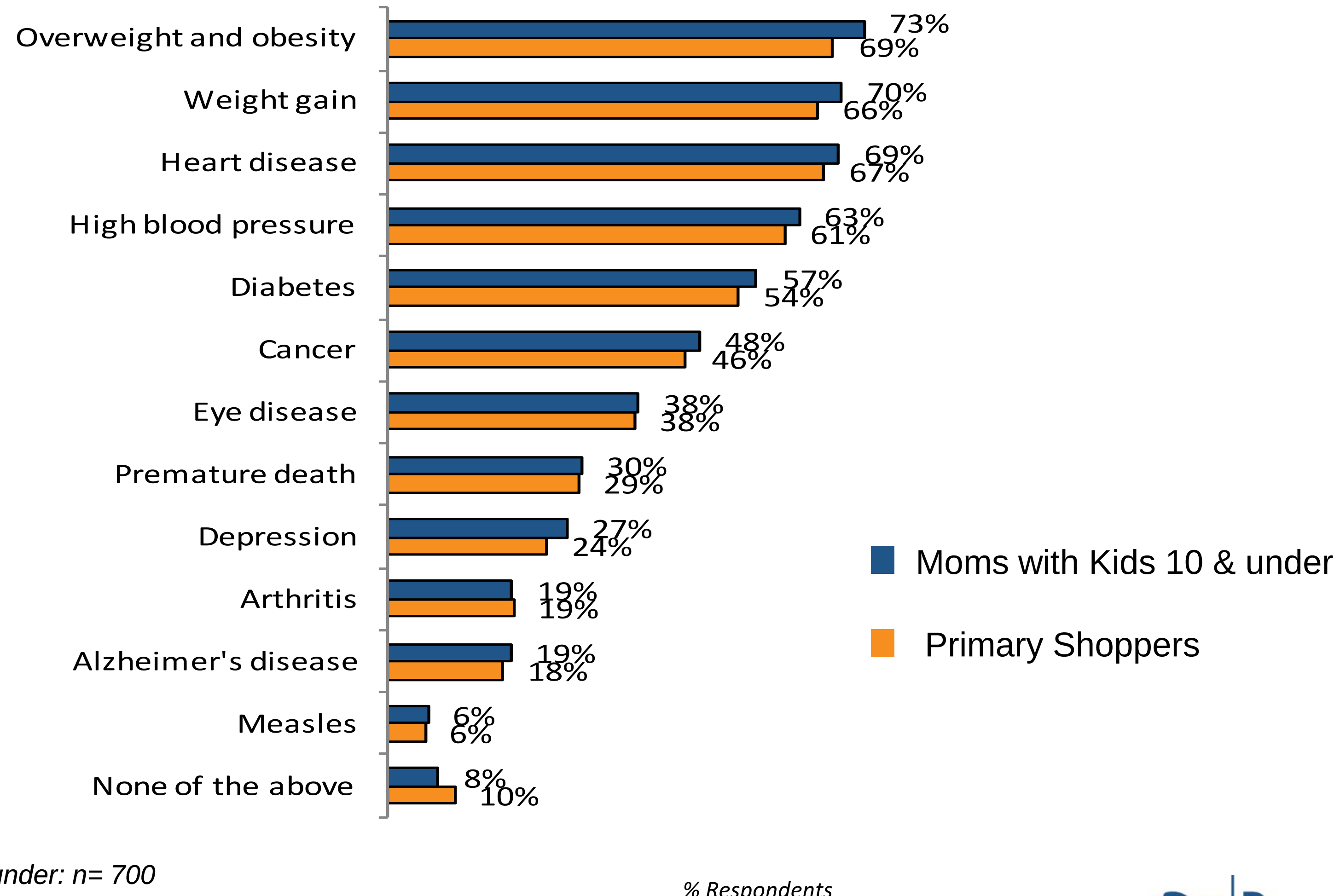
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to eat fruits and vegetables to:
  - **Feel well** (Younger: 26% / Older: 18%);
  - **Get energy** (Younger: 26% / 16%);

Q116: Please select up to three of the most important reasons why you, yourself, eat fruits and vegetables?

Respondents overall believe eating fruits and vegetables primarily prevents obesity, weight gain, and heart disease

Conditions fruits and vegetables may help prevent



Moms with Kids 10 & under: n= 700
Primary Shoppers n=600

Q117: Which of the following do you believe consuming fruits and vegetables may be beneficial for preventing? (Please select all that apply)

Perceived Prevention Benefits of Eating Fruits and Vegetables

The following statistically significant differences for perceived benefits of eating fruits and vegetables were found amongst the following Primary Shoppers groups:

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to believe the following perceived benefits:
  - **Premature death** (Male: 34% / Female: 25%);
  - **Measles** (Male: 8% / Female: 3%).

Married vs. Single Primary Shoppers

- Married Primary Shoppers are more likely than Single Primary Shoppers to believe the benefits of preventing **heart disease** (Married: 69% / Single: 61%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to believe the benefits of preventing **heart disease** (Higher: 72% / Lower: 65%).

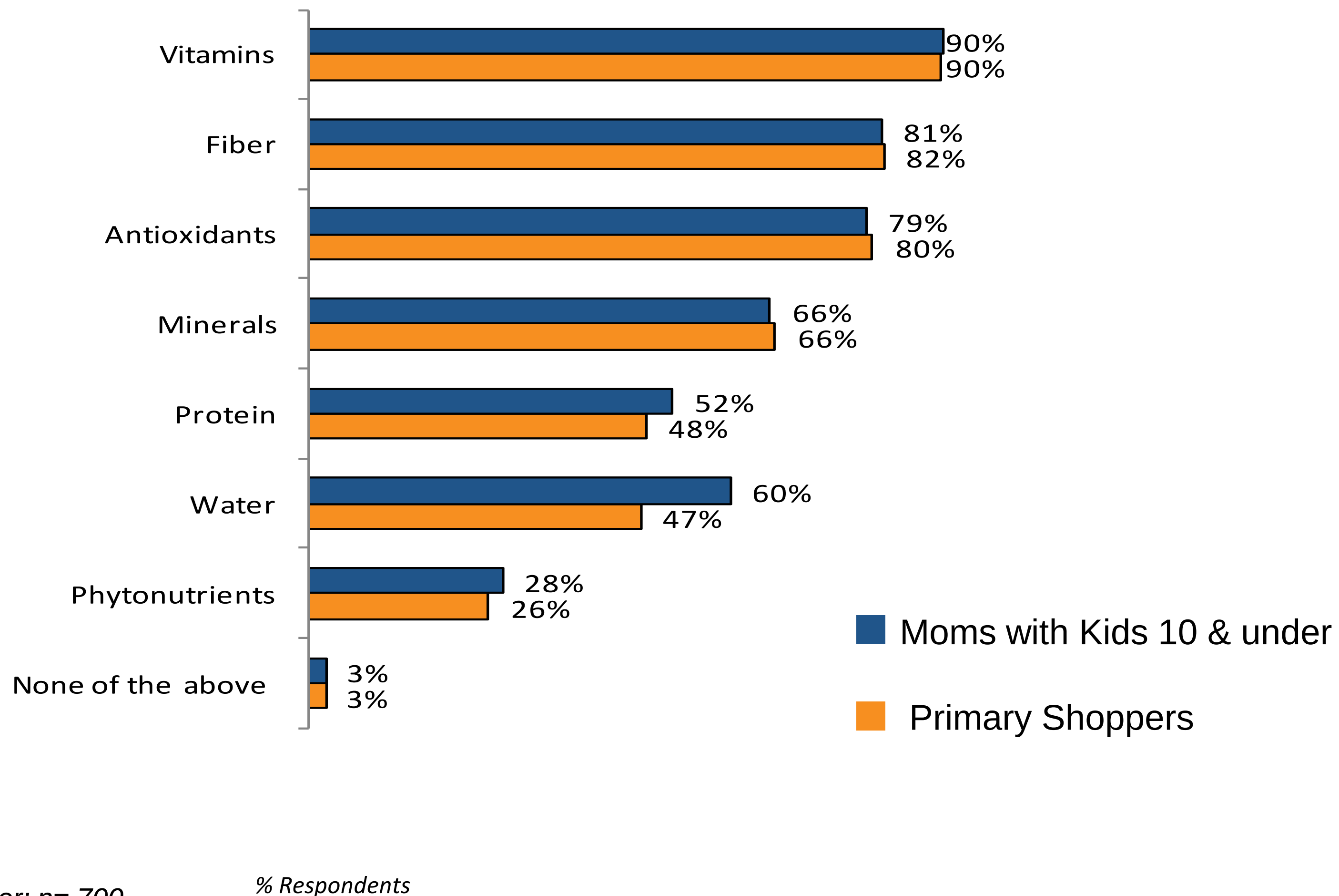
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to perceive the benefits of preventing:
  - **Depression** (Younger: 30% / Older: 24%);
  - **Measles** (Younger: 8% / Older: 5%).
- Older Primary Shoppers are more likely than Younger Primary Shoppers to perceive the benefits of preventing:
  - **Heart disease** (Older: 71% / Younger: 63%);
  - **Cancer** (Older: 50% / Younger: 40%).

Q117. Which of the following do you believe consuming fruits and vegetables may be beneficial for preventing?

Vitamins, Fiber, and Antioxidants are the primary benefits associated with fruits and vegetables

Components perceived as beneficial provided by fruits and vegetables



**Moms with Kids 10 & under: n= 700*
Primary Shoppers n=700

Q118. Which of the following components of fruits and vegetables do you believe may provide health benefits? (Please select all that apply)

Components of the Fruits and Vegetables that Provide Health Benefits

The following statistically significant differences of the components of fruits and vegetables that provide health benefits were found amongst the following Primary Shoppers groups:

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers believe that **Protein** is a component of fruit and vegetables that provides health benefits (Male: 52% / Female: 44%).
- Female Primary Shoppers are more likely than Male Primary Shoppers to believe that **Water** is a component of fruit and vegetables that provide health benefits (Female: 52% / Male: 43%).

Married vs. Single Primary Shoppers

- Married Primary Shoppers are more likely than Single Primary Shoppers to believe the following components of fruits and vegetables provide health benefits:
  - **Fiber** (Married: 83% / Single: 70%);
  - **Antioxidants** (Married: 81% / Single: 72%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to believe components of fruits and vegetables provide health benefits:
  - **Vitamins** (Higher: 92% / Lower: 88%);
  - **Antioxidants** (Higher: 83% / Lower: 76%);
  - **Minerals** (Higher: 70% / Lower: 62%);
  - **Phytonutrients** (Higher: 30% / Lower: 23%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

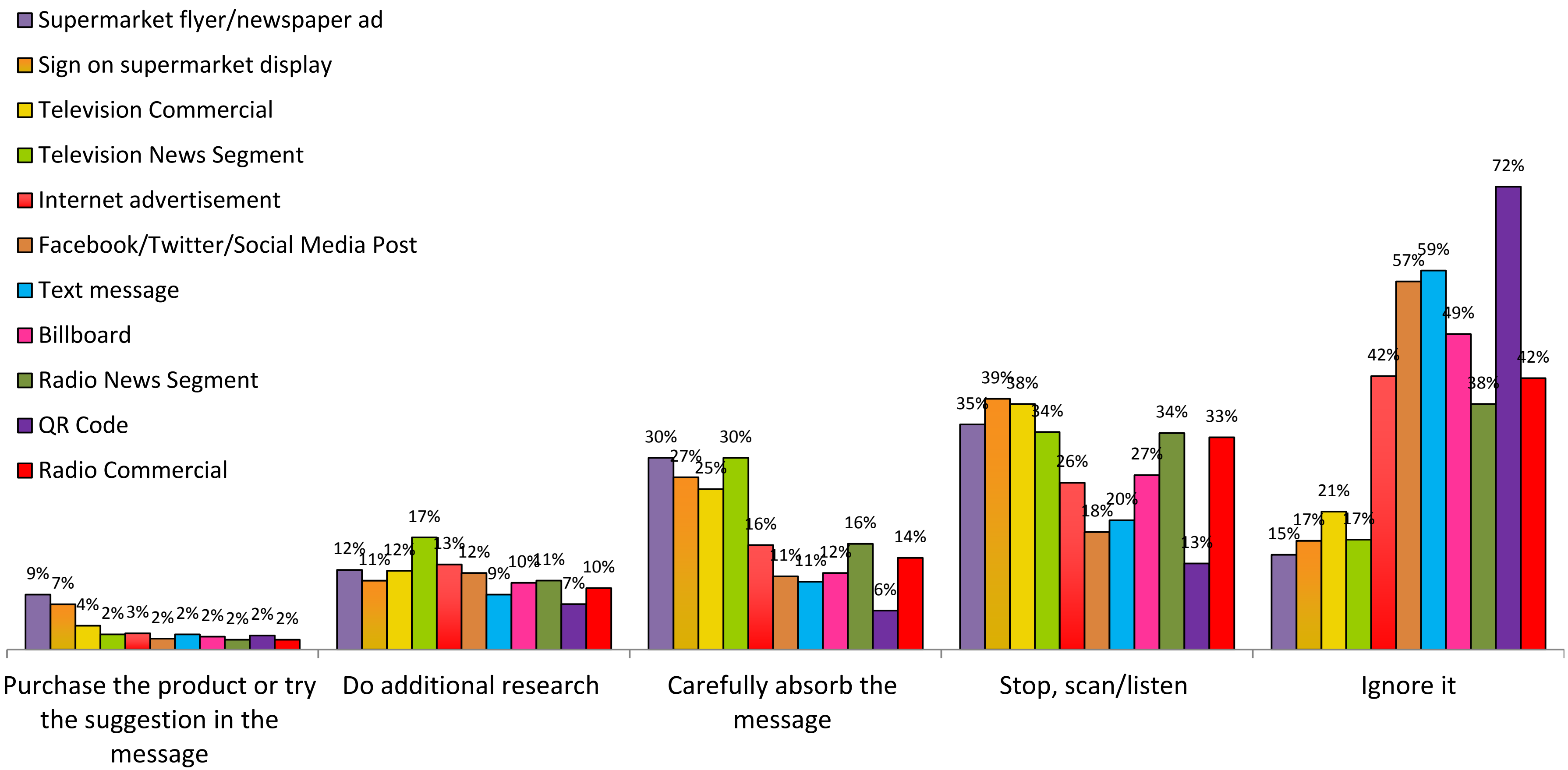
- Younger Primary Shoppers are more likely than Older Primary Shoppers to believe that components of fruits and vegetables provide the following health benefits:
  - **Water** (Younger: 61% / Older: 51%);
  - **Protein** (Younger: 57% / 47%).
- Older Primary Shoppers are more likely than Younger Primary Shoppers to believe that components of fruits and vegetables provide the following health benefits
  - **Vitamins** (Older: 91% / Older: 88%);
  - **Fiber** (Older: 85% / Older: 75%);
  - **Antioxidants** (Older: 82% / Younger: 75%).

Q118. Which of the following components of fruits and vegetables do you believe may provide health benefits? (Please select all that apply)

Marketing Mix

Supermarket flyers and signage are the most efficient communication methods to influence Primary Shoppers to purchase a product

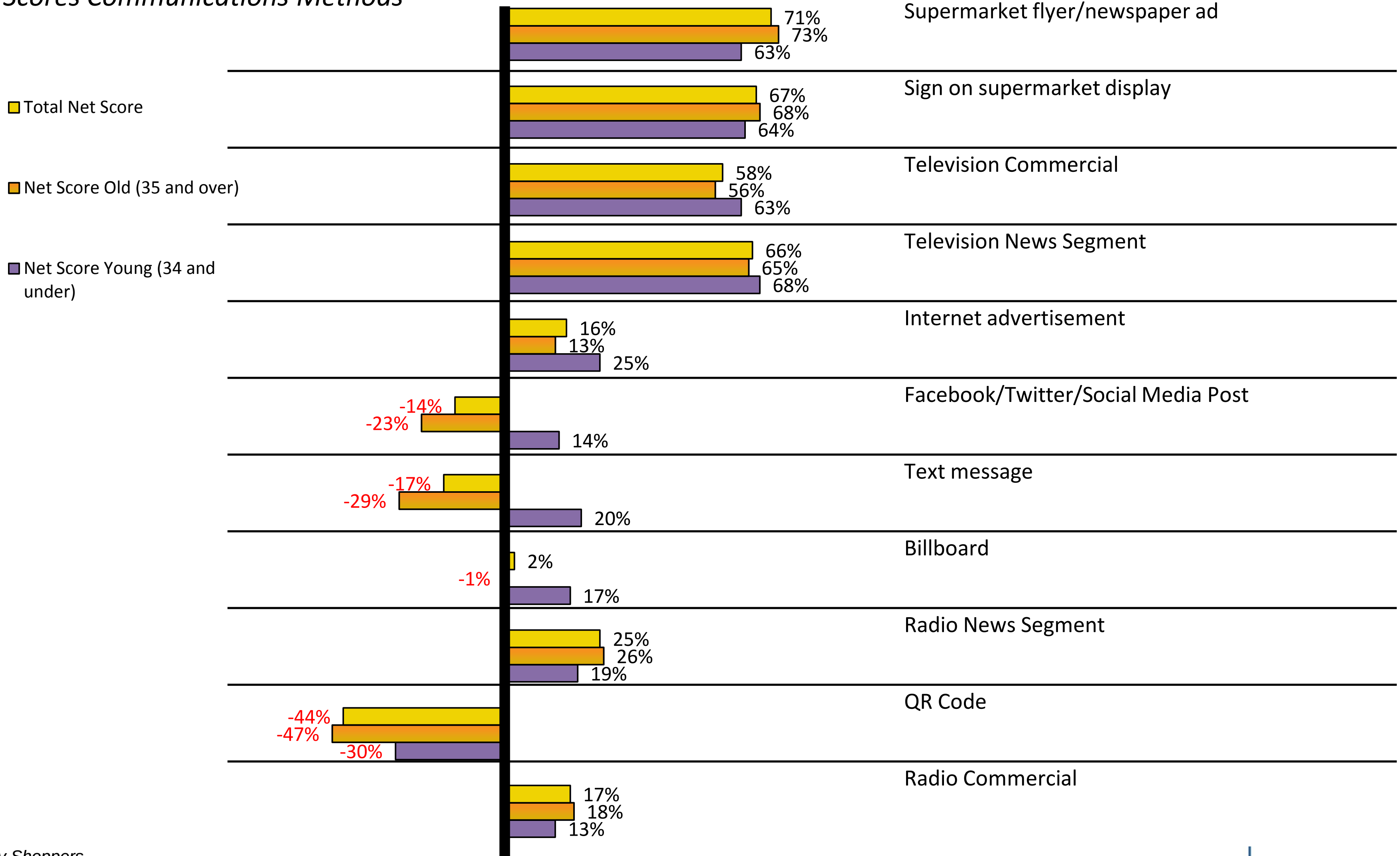
Communications methods



Q123. What would be your response to the following communication methods regarding a type of food that you or someone in your household may enjoy?

Communication methods associated with Supermarkets and Television have the highest Net scores in terms of effectiveness

Net Scores Communications Methods



Primary Shoppers

Net Scores: [(Purchase + Additional Research + Carefully Absorb + Stop, Scan/listen) – (Ignore it)].

Q123. What would be your response to the following communication methods regarding a type of food that you or someone in your household may enjoy?

Response to Communication Methods

The following statistically significant differences for the following responses to communication methods were found amongst the following Primary Shoppers groups:

Ignore It

Male vs. Female Primary Shoppers
- Male Primary Shoppers are more likely than Female Primary Shoppers to ignore:
  - **QR Code** (Male: 76% / Female: 67%);
  - **Text messages** (Male: 63% / Female: 55%).

Married vs. Single Primary Shoppers
- Married Primary Shoppers are more likely than Single Primary Shoppers to ignore **text messages** (Married: 54% / Single: 40%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers
- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to ignore **radio news segments** (Lower Income: 39% / Higher Income: 35%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
- Younger Primary Shoppers are more likely than Older Primary Shoppers to ignore **supermarket flyer/newspaper ads** (Younger: 18% / Older: 12%).
- Older Primary Shoppers are more likely than Younger Primary Shoppers to ignore:
  - **Text messages** (Older: 59% / Younger: 40%);
  - **Facebook/Twitter/Social Media Posts** (Older: 55% / Younger: 36%).

Stop and Scan/Listen

Married vs. Single Primary Shoppers
- Married Primary Shoppers are more likely than Single Primary Shoppers to stop and scan/listen to **Radio Commercials** (Married: 38% / Single: 30%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers
- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to stop and scan/listen to:
  - **Television commercials** (Higher Income: 42% / Lower Income: 36%);
  - **Radio commercials** (Higher Income: 40% / Lower Income: 32%);
  - **Radio News Segments** (Higher Income: 39% / Lower Income: 29%);
  - **Billboards** (Higher Income: 34% / Lower Income: 25%);
  - **Text messages** (Higher Income: 25% / Lower Income: 20%);
  - **QR Codes** (Higher Income: 16% / Lower Income: 12%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
- Younger Primary Shoppers are more likely than Older Primary Shoppers to stop and scan/listen to :
  - **Facebook/Twitter/Social Media Posts** (Younger: 29% / Older: 20%);
  - **Text messages** (Younger: 27% / Older: 20%).

Carefully Absorb the Message

Male vs. Female Primary Shoppers
- Male Primary Shoppers are more likely than Female Primary Shoppers to carefully absorb the messages from:
  - **Radio Commercials** (Male: 17% / Female: 11%);
  - **Text messages** (Male: 13% / Female: 8%).

Married vs. Single Primary Shoppers
- Single Primary Shoppers are more likely than Married Primary Shoppers to carefully absorb the messages from:
  - **Supermarket Flyers/Newspaper Ads** (Single: 33% / Married: 24%);
  - **Radio commercials** (Single: 21% / Married: 13%);
  - **Internet Advertisements** (Single. 20% / Married: 14%);
  - **Billboards** or **Text messages** (Single: 20% / Married: 13%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers
- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to carefully absorb the messages from **billboards** (Lower Income: 17% / Higher Income: 13%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
- Younger Primary Shoppers are more likely than Older Primary Shoppers to carefully absorb the messages from:
  - **Text messages** (Younger: 18% / Older: 11%);
  - **Facebook/Twitter/Social Media Post** (Younger: 17% / Older: 12%).

Do Additional Research

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
- Younger Primary Shoppers are more likely than Older Primary Shoppers to do additional research from:
  - **Text messages** (Younger: 11% / Older: 8%);
  - **Facebook/Twitter/Social Media Post** (Younger: 94% / Older: 66%).

Purchase Product/ Try Suggestions

Male vs. Female Primary Shoppers
- Female Primary Shoppers are more likely than Male Primary Shoppers to purchase the product or try the suggestion in the **Supermarket flyers/Newspaper Ads** (Female: 11% / Male: 6%).

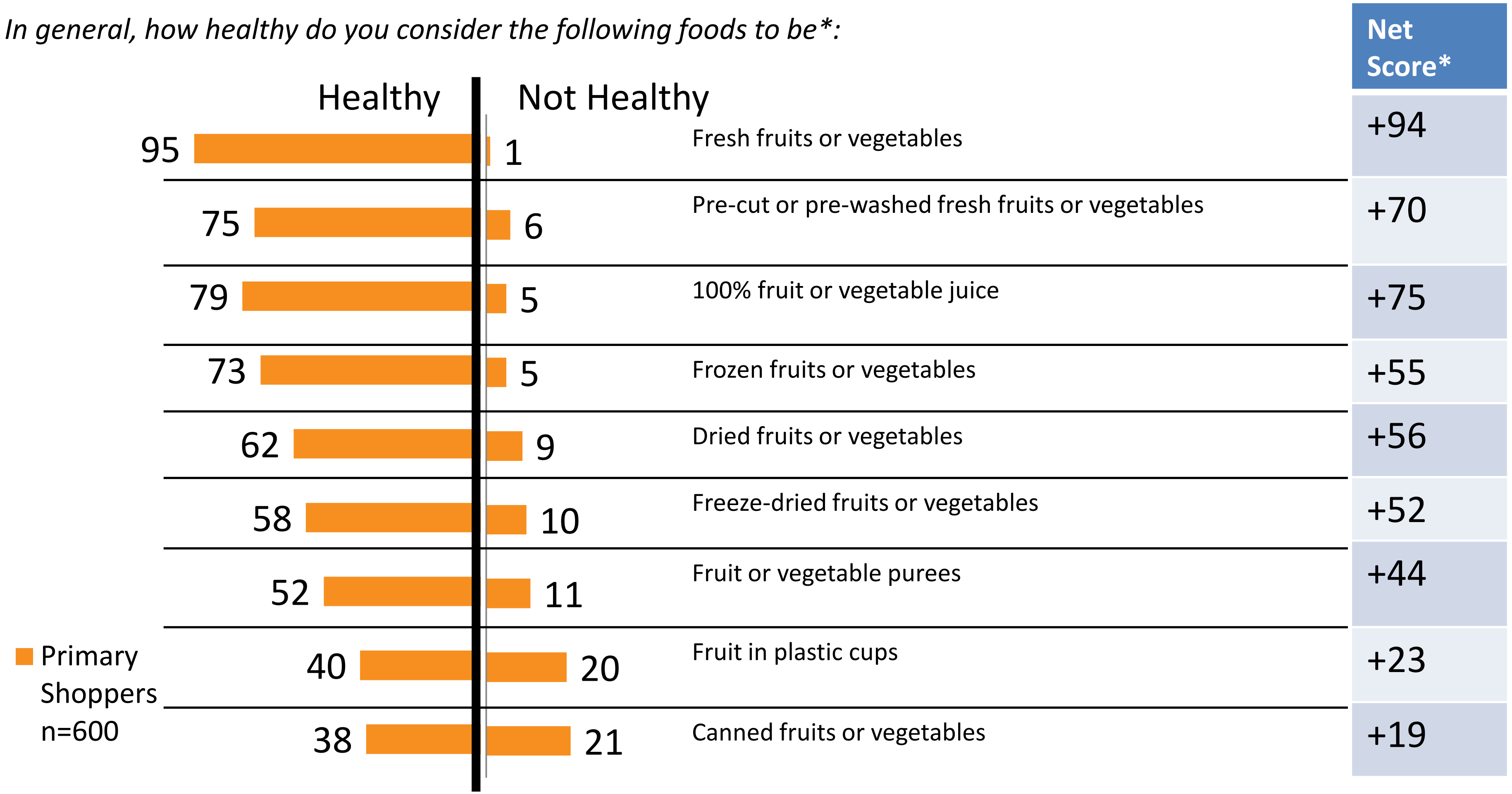
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
- Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase product or try the suggestion in:
  - **Internet advertisement** (Younger: 4% / Older: 2%);
  - **Facebook/Twitter/Social Media Post or Billboards** (Younger: 4% / Older: 2%).

Q123(a-k): What would be your response to the following communications methods regarding a type of food that you or someone in your household may enjoy?

Various Forms

Fresh Fruits and Vegetables are considered the most healthy forms by Primary Shoppers, while canned is the least healthy

In general, how healthy do you consider the following foods to be:*



% Respondents
*Please note percentages do not add to 100 as "neither" responses have been excluded

***Net score represents % respondents who agree with the given statement less those who disagree*

Q17. In general, how healthy do you consider the following foods to be?

Perception of Food Healthiness

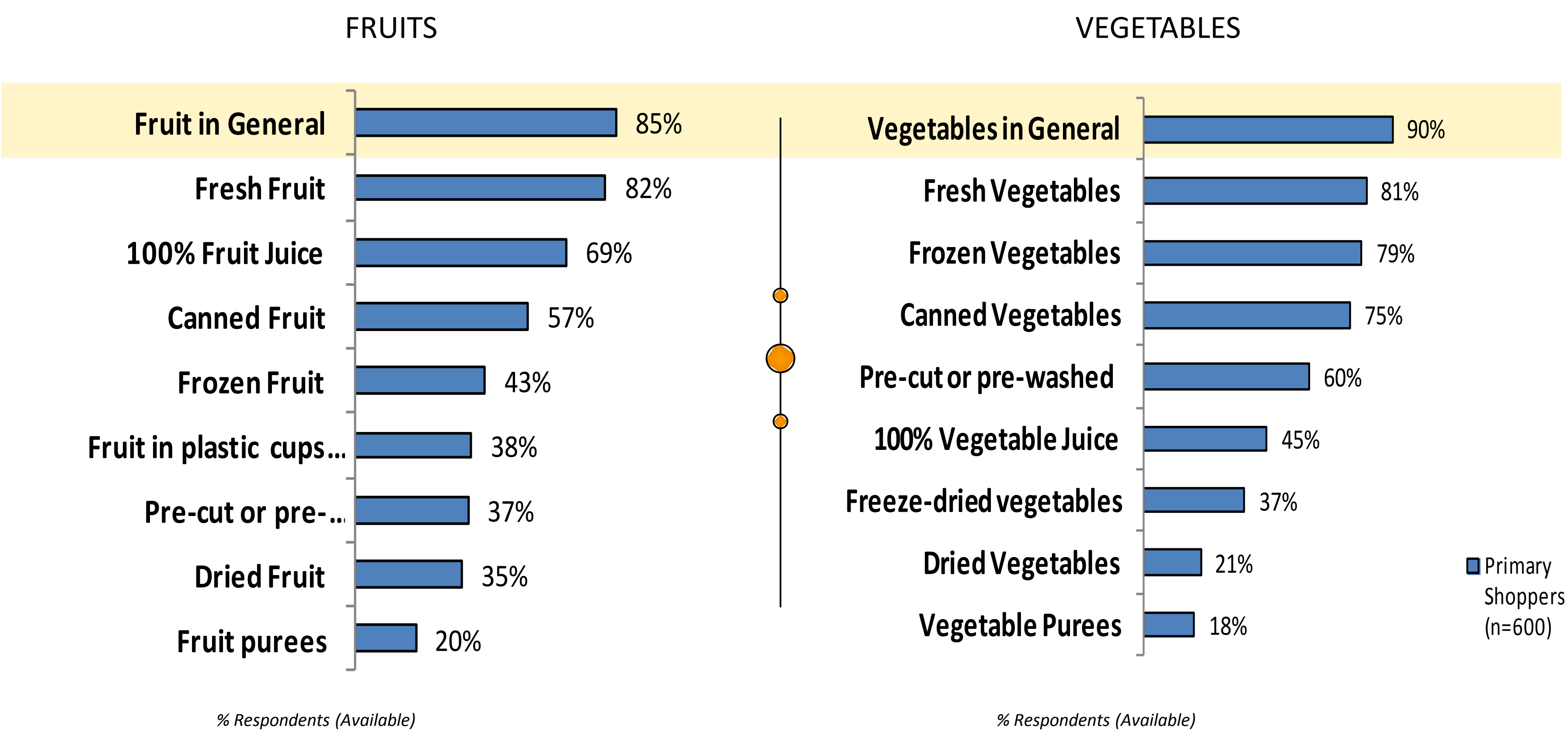
The following statistically significant differences were found amongst the following Primary Shoppers groups who perceive these foods to be:

Healthy	Not Healthy
Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to agree that these foods are healthy: ➢ **Dried fruits or vegetables** (Male: 66% / Female: 58%); ➢ **Freeze dried fruits or vegetables** (Male: 62% / Female: 54%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to agree that these foods are unhealthy: ➢ **Fruits in plastic cups** (Female: 26% / Male 14%); ➢ **Canned fruits or vegetables** (Female: 25% / Male: 17%); ➢ **Pre-cut or pre-washed fresh fruits or vegetables** (Female: 8% / Male: 4%).
Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to agree that these foods are healthy: ➢ **Fresh fruits or vegetables** (Married: 96% / Single: 91%); ➢ **Pre-cut or pre-washed fresh fruits or vegetables** (Married: 78% / Single: 70%); ➢ **Frozen fruits or vegetables** (Married: 74% / Single: 65%).	**Married vs. Single Primary Shoppers** ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to agree that these foods are unhealthy: ➢ **Canned fruits or vegetables** (Single: 29% / Married: 20%); ➢ **Pre-cut or pre-washed fresh fruits or vegetables** (Single: 8% / Married: 4%).
Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to that to agree that **100% fruit or vegetable juice** are healthy (Lower Income: 79% / Higher Income: 74%).	**Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers** ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to that to agree that **Fruit or vegetables purees** are unhealthy (Lower Income: 11% / Higher Income: 8%).
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to agree that **fruit and vegetables** are healthy (Younger: 62% / Older: 51%). ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to agree that these foods are healthy: ➢ **Fresh fruits and vegetables** (Older: 96% / Younger: 93%); ➢ **100% fruit or vegetable juice** (Older: 78% / Younger: 73%); ➢ **Frozen fruits or vegetables** (Older: 76% / Younger: 68%); ➢ **Dried fruits or vegetables** (Older: 63% / Younger: 54%); ➢ **Fruits in plastic cups** (Older: 42% / Younger: 34%).	**Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers** ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to agree that these foods are unhealthy: ➢ **Fruits in plastic cups** (Younger: 29% / Older: 19%); ➢ **Canned fruits or vegetables** (Younger: 28% / Older: 19%); ➢ **Freeze-dried fruits or vegetables** (Younger: 16% / Older: 7%); ➢ **Dried fruits or vegetables** (Younger: 13% / Older: 8%); ➢ **100% fruit or vegetable juice** (Younger: 9% / Older: 5%); ➢ **Frozen fruits or vegetables** (Younger: 9% / Older: 3%); ➢ **Fresh fruits or vegetables** (Younger: 3% / Older: 1%).

Q17. In general, how healthy do you consider the following foods to be?

Fruit and Vegetables in general are most available in homes of Primary Shoppers, followed by Fresh

How available are fruit and vegetables in your home?



Q18. Please rate the availability of fruit and vegetables in your home.

Availability of Fruits and Vegetables

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the availability of fruits and vegetables in the home:

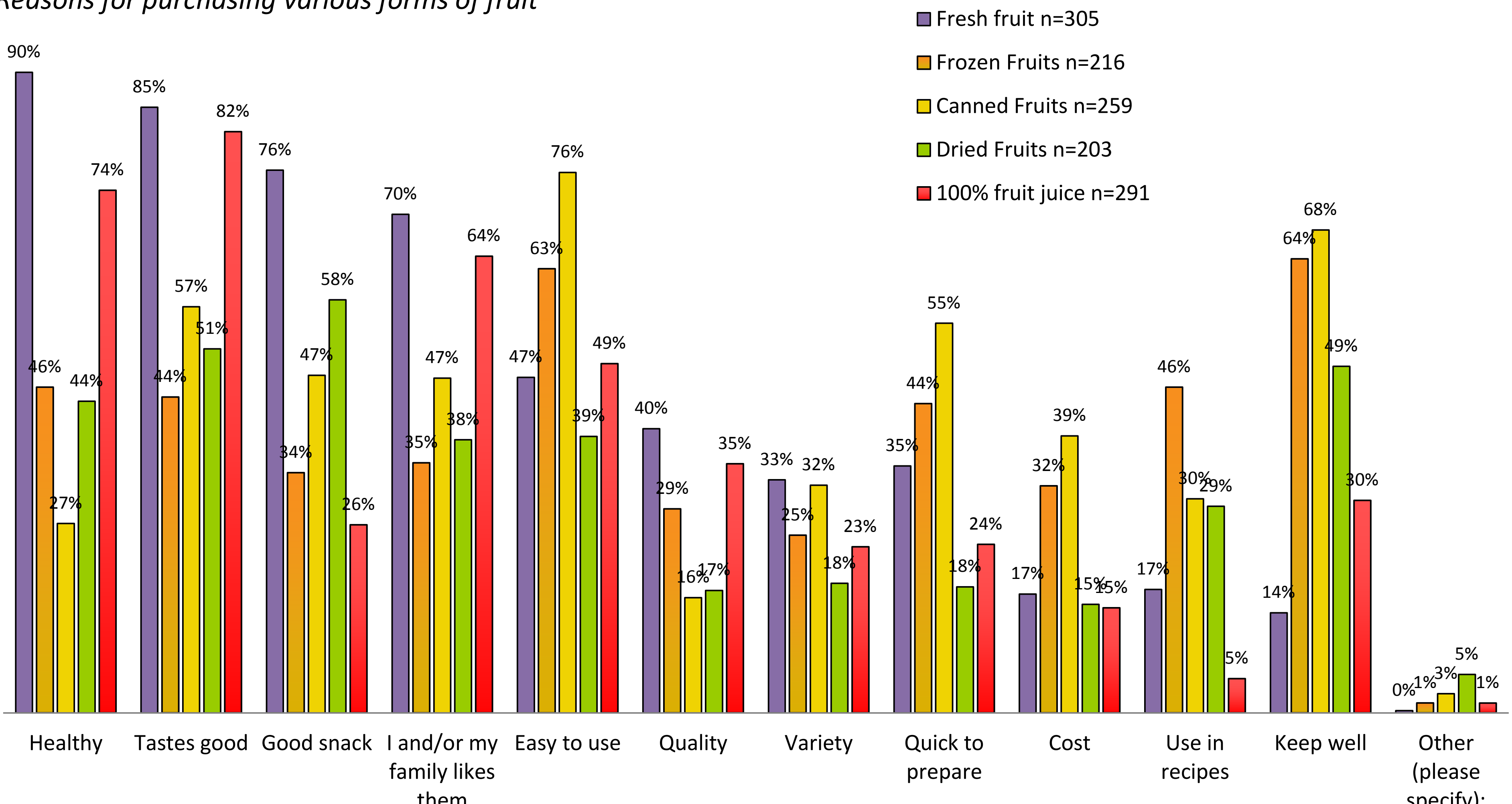
Available in the Home	Not Available in the Home

Male vs. Female Primary Shoppers
➢ Male Primary Shoppers are more likely than Female Primary Shoppers to have **freeze-dried fruit** in the home (Male: 23% / Female: 16%).
➢ Female Primary Shoppers are more likely than Male Primary Shoppers to have the following foods in the home:
  ➢ **Vegetables in general** (Female: 93% / Male: 87%);
  ➢ **Frozen vegetables** (Female: 83% / Male: 75%).
 	
Married vs. Single Primary Shoppers
➢ Married Primary Shoppers are more likely than Single Primary Shoppers to agree that these foods to be healthy:
  ➢ **Fresh fruits or vegetables** (Married: 96% / Single: 91%);
  ➢ **Pre-cut or pre-washed fresh fruits or vegetables** (Married: 78% / Single: 70%);
  ➢ **Frozen fruits or vegetables** (Married: 74% / Single: 65%).
 	
Lower vs. Higher Annual Household Income (Under $50,000 or $50,000 or over) Primary Shoppers
➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to have the following foods in the home:
  ➢ **Vegetables in general** (Higher Income: 94% / Lower Income: 89%);
  ➢ **Fruit in general** (Higher Income: 93% / Lower Income: 90%);
  ➢ **Fresh fruit** (Higher Income: 90% / Lower Income: 85%);
  ➢ **Fresh vegetables** (Higher Income: 86% / Lower Income: 80%);
  ➢ **Frozen vegetables** (Higher Income: 87% / Lower Income: 74%);
  ➢ **100% fruit juice** (Higher Income: 78% / Lower Income: 73%);
  ➢ **Frozen fruit** (Higher Income: 47% / Lower Income: 41%);
  ➢ **Dried fruit** (Higher Income: 41% / Lower Income: 32%).
 	
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
➢ Younger Primary Shoppers are more likely than Older Income Primary Shoppers to have the following foods in the home:
  ➢ **Frozen fruit** (Younger: 48% / Older: 42%);
  ➢ **Dried vegetables** (Younger: 26% / Older: 17%);
  ➢ **Freeze-dried fruit** (Younger: 24% / Older: 18%).
➢ Older Primary Shoppers are more likely than Younger Income Primary Shoppers to have the following foods in the home:
  ➢ **Frozen vegetables** (Older: 83% / Younger: 76%);
  ➢ **Canned vegetables** (Older: 79% / Younger: 73%).
	Male vs. Female Primary Shoppers
	➢ Male Primary Shoppers are more likely than Female Primary Shoppers to not have the following in the home:
	  ➢ **Frozen vegetables** (Male: 25% / Female: 17%);
	  ➢ **Vegetables in general** (Male: 135 / Female: 7%).
	➢ Female Primary Shoppers are more likely than Male Primary Shoppers to not to have **freeze-dried fruit** in the home (Female: 84% / Male: 77%).
	
	Married vs. Single Primary Shoppers
	➢ Married Primary Shoppers are more likely than Single Primary Shoppers to not have **dried vegetables** in the home (Married: 81% / Single: 72%).
	➢ Single Primary Shoppers are more likely than Married Primary Shoppers to not have the following in the home:
	  ➢ **Canned fruit** (Single: 46% / Married: 38%);
	  ➢ Canned vegetables (Single: 36% / Married: 20%);
	  ➢ 100% fruit juice (Single: 30% / Married: 23%);
	  ➢ Frozen vegetables (Single: 29% / Married: 16%);
	  ➢ Fresh fruit (22% / Single 22%: Married: 13%);
	  ➢ Vegetables in general (Single: 18% / Married: 6%);
	  ➢ Fruit in general (Single: 17% / Married: 10%).
	
	Lower vs. Higher Annual Household Income (Under $50,000 or $50,000 or over) Primary Shoppers
	➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to not have the following in the home:
	  ➢ **Dried fruit** (Lower Income: 68% / Higher Income: 59%);
	  ➢ **Frozen fruit** (Lower Income: 59% /Higher Income: 53%);
	  ➢ **100% fruit juice** (Lower Income: 27% / Higher Income: 22%);
	  ➢ **Frozen vegetables** (Lower Income: 26% / Higher Income: 13%);
	  ➢ **Fresh vegetables** (Lower Income: 20% / Higher Income: 14%);
	  ➢ **Fresh Fruit** (Lower Income: 21% / Higher Income: 10%);
	  ➢ **Fruit in general** (Lower Income: 16% / Higher Income: 7%);
	  ➢ **Vegetables in general** (Lower Income: 11% / Higher Income: 6%).
	
	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
	➢ Younger Primary Shoppers are more likely than Older Income Primary Shoppers to not have the following foods in the home:
	  ➢ **Canned vegetables** (Younger: 27% / Older: 21%);
	  ➢ **Frozen vegetables** (Younger: 24% / Older: 17%).
	➢ Older Primary Shoppers are more likely than Younger Income Primary Shoppers to not have the following foods in the home:
	  ➢ **Dried vegetables** (Older: 83% / Younger: 74%);
	  ➢ **Freeze-dried vegetables** (Older: 82% / 76%);
	  ➢ **Frozen fruit** (Older: 58% / Younger: 52%).

Q18. Please rate the availability of fruits and vegetables in your home.

Each type of fruit has different key reasons as to why it is purchased - for example, Fresh is healthy, whereas Canned is easy to use

Reasons for purchasing various forms of fruit

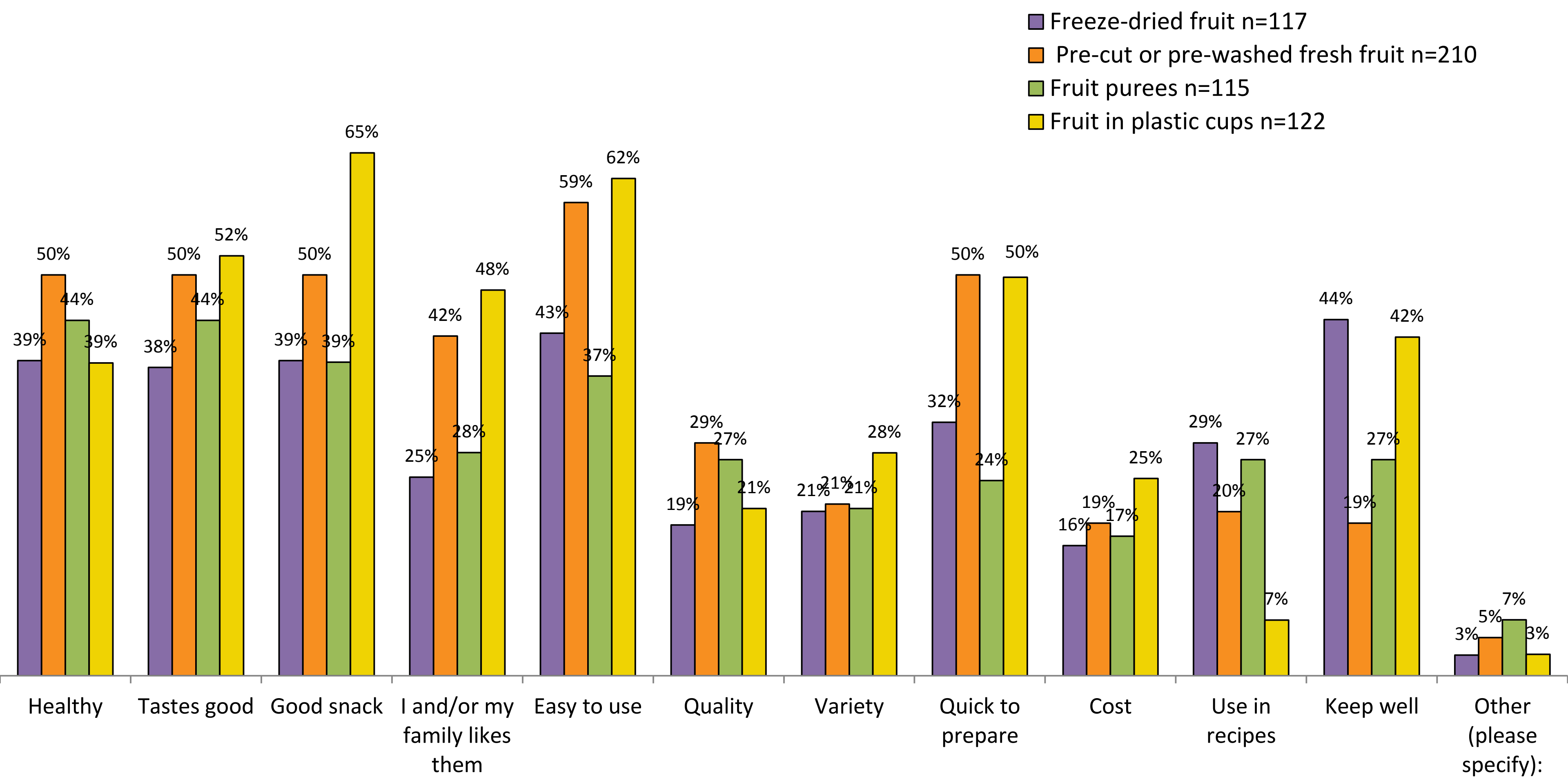


Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question *<u>available in their homes.</u>*
<u>2012 Primary Shopper Responses only</u>

Q22-43: Why do you purchase ***<u>[various forms of]</u>*** *fruit? (Please select all that apply)*

Again, different key reasons for each type of fruit

Reasons for purchasing various forms of fruit



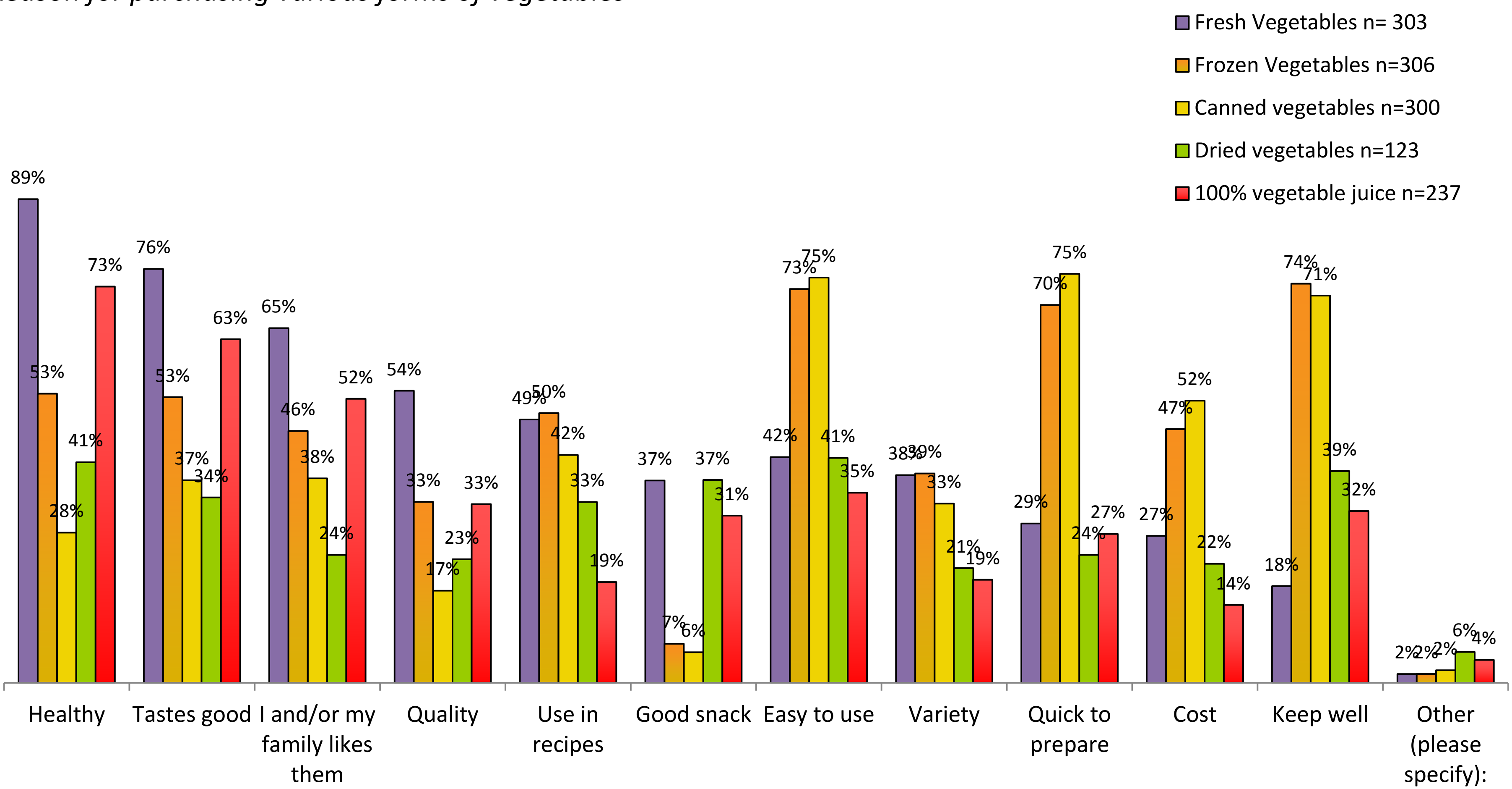
Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.

2012 Primary Shoppers Responses only

Q47-52 Why do you purchase [various forms of] fruit? (Please select all that apply)

The findings hold true for vegetables – each type is purchased for different reasons, but reasons are common to both fruits and vegetables

Reason for purchasing various forms of vegetables

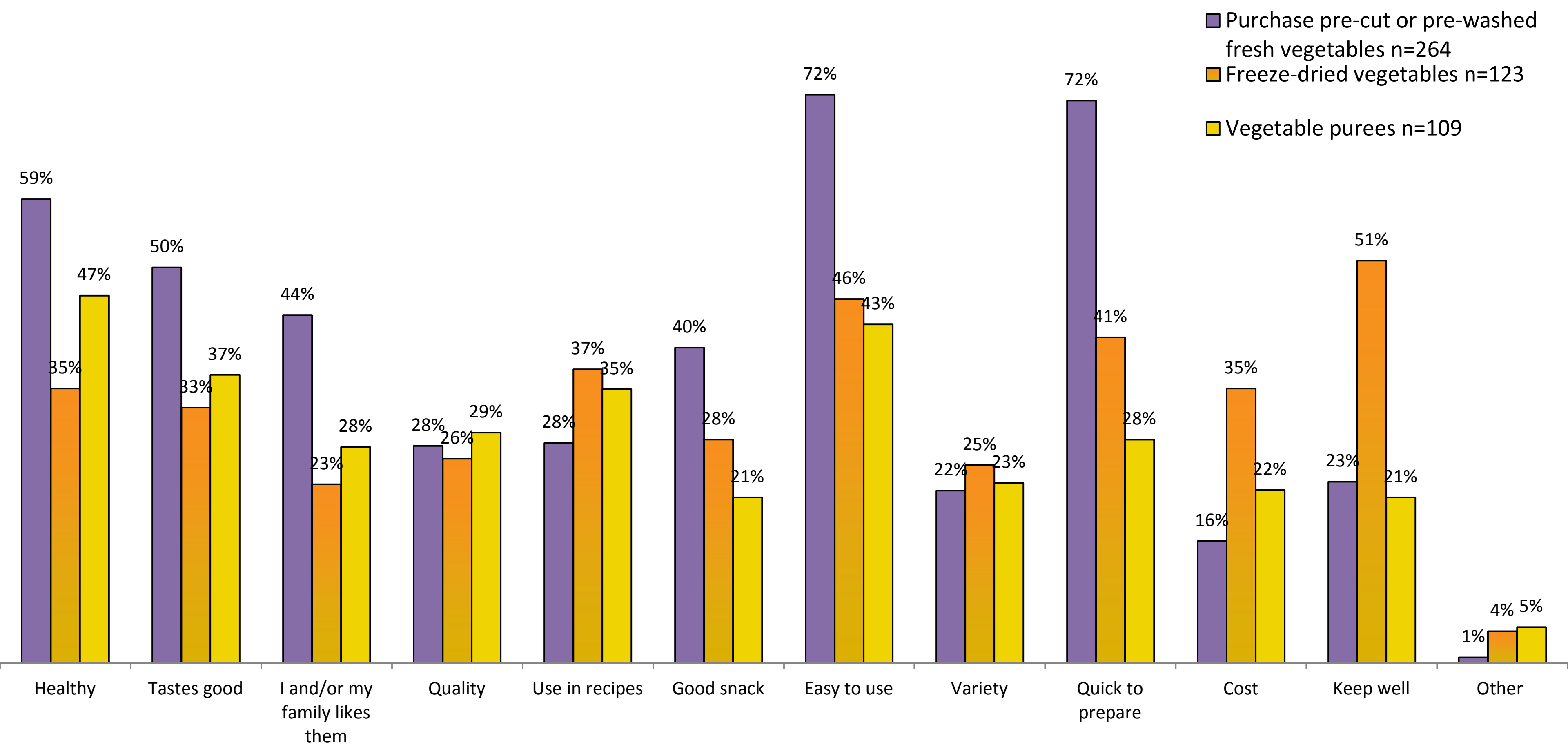


Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of vegetable in question available in their homes.
2012 Primary Shoppers Responses only

Q67-87: Why do you purchase ***[various forms of]*** *vegetables? (Please select all that apply)*

The finding on reasons for purchasing applies to these forms of vegetables as well

Reasons for purchasing various forms of vegetables



Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.

2012 Primary Shoppers Responses only

*Q92-102: Why do you purchase **[various forms of]** vegetables (Please select all that apply)*

Reasons for Purchase

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the reasons why they purchase the following:

Fresh Fruit	Frozen Fruit	Canned Fruit	Dried Fruit
Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase because: ➢ **Good snack** (Female: 83% / Male: 69%); ➢ **I and/or my family likes them** (Female: 75% / Male: 64%); ➢ **Easy to use** (Female: 54% / Male: 38%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because **I and/or my family likes them** (Married: 78% / Single: 64%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because of **costs** (Lower Income: 24% / Higher Income: 16%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase because of **costs** (Younger: 26% / Older: 17%). ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers purchase because of ➢ **I and/or my family likes them** (Older: 78% / Younger: 71%); ➢ **Easy to use** (Older: 54% / Younger: 42%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase because of **costs** (Male: 39% / Female: 25%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because of: ➢ **Healthy** (Married: 46% / Single: 25%); ➢ **I and/or my family likes them** (Married: 40% / Single: 21%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because **healthy** (Lower Income: 52% / Higher Income: 38%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because: ➢ **Tastes good** (Older: 47% / Younger: 39%); ➢ **Quick to prepare** (Older: 47% / Younger: 37%); ➢ **Variety** (Older: 30% / Younger: 21%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase because ➢ **I and/or my family likes them** (Female: 54% / Male: 40%); ➢ **Use in recipes** (Female: 39% / Male: 21%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because **I and/or my family likes them** (Married: 58% / Single: 41%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because: ➢ **I and/or my family likes them** (Lower Income: 60% / Higher Income: 50%); ➢ **Good Snack** (Lower Income: 54% / Higher Income: 43%); ➢ **Cost** (Lower Income: 48% / Higher Income: 39%); ➢ **Variety** (Lower Income: 38% / Higher Income: 27%); ➢ **Healthy** (Lower Income: 33% / Higher Income: 25%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase because of **cost** (Younger: 51% / Older: 41%). ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because: ➢ **Easy to Use** (Older: 78% / Younger: 64%); ➢ **Keep Well** (Older: 71% / Younger: 61%); ➢ **Tastes good** (Older: 58% / Younger: 47%); ➢ **Use in recipes** (Older: 33% / Younger: 25%); ➢ **Quality** (Older: 20% / Younger: 10%).	Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because **good snacks** (Married: 66% / Single: 42%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because: ➢ **Good snack** (Older: 69% / Younger: 50%); ➢ **Keep well** (Older: 50% / Younger: 33%); ➢ **Easy to use** (Older: 45% / Younger: 33%).

Reasons for Purchase - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the reasons why they purchase the following:

100% Fruit Juice	Freeze-Dried Fruit	Pre-Cut or Pre-Washed Fresh Fruit	Fruit Purees	Fruit in Plastic Cups
Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase because **I and/or my family likes them** (Female: 72% / Male: 56%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because: ➢ **I and/or my family likes them** (Married: 75% / Single: 62%) ➢ **Easy to use** (Married: 43% / Single: 33%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because of **costs** (Lower Income: 21% / Higher Income: 13%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers purchase because it is **Easy to use** (Older: 48% / Younger: 36%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase because it is **quick to prepare** (Male: 39% / Female: 21%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because it **keeps well** (Older: 44% / Younger: 30%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase because it is **easy to prepare** (Female: 59% / Male: 43%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase because of the **cost** (Single: 29% / Married: 16%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because of the **cost** (Lower Income: 25% / Higher Income: 11%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because it is **easy to use** (Older: 62% / Younger: 51%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase because of **variety** (Male: 26% / Female: 12%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase because of the **cost** (Higher Income: 24% / Lower Income: 14%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase because of the **cost** (Younger: 23% / Older: 9%).	Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because **I and/or my family likes them** (Married: 61% / Single: 42%). ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase because of the **cost** (Single: 41% / Married: 23%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because of **variety** (Lower Income: 32% / Higher Income: 23%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because it **keeps well** (Older: 50% / Younger: 41%).

Q42/Q47/Q52/Q57/Q62. Why do you purchase <insert Item> (Base: Sample of All respondents who say that <insert item> is available in the home?)

Reasons for Purchase - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the reasons why they purchase the following:

Fresh Vegetables	Frozen Vegetables	Canned Vegetables	Dried Vegetables
Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase because they: ➢ **Tastes good** (Female: 82% / Male: 70%); ➢ **I and/or my family likes them** (Female: 71% / Male: 59%); ➢ **Good snack** (Female: 45% / Male: 28%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because of **costs** (Lower Income: 31% / Higher Income: 21%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers purchase because: ➢ **Tastes good** (Older: 81% / Younger: 71%); ➢ **Easy to use** (Older: 41% / Younger: 30%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase because: ➢ **I and/or my family likes them** (Female: 54% / Male: 36%); ➢ **Variety** (Female: 43% / Male: 32%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because they **and/ or their family likes them** (Married: 52% / Single: 43%). ➢ **Quality** (Married: 29% / Single: 18%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase because of **Cost** (Younger: 59% / Older: 47%). ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase frozen vegetables because they are **Healthy** (Older: 56% / Younger: 47%). ➢ **Tastes Good** (Older: 53% / Younger: 39%). ➢ **Quality** ((Older: 33% / Younger: 20%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase canned vegetables because they are **Easy to use** (Female: 80% / Male: 69%); ➢ **I and/or my family likes them** (Female: 45% / Male: 29%); Married vs. Single Primary ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because they **Keep Well** (Single: 60% / Married: 72%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because of **costs** (Lower Income: 62% / Higher Income: 52%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because they **keep well** (Older: 74% / Younger: 64%).	Married vs. Single Primary ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase because **of cost** (Married: 20% / Single: 33%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because they **keep well** (Older: 42% / Younger: 26%).

Q67/Q72/Q77/Q82. Why do you purchase <insert Item> (Base: Sample of All respondents who say that <insert item> is available in the home?)

Reasons for Purchase - continued

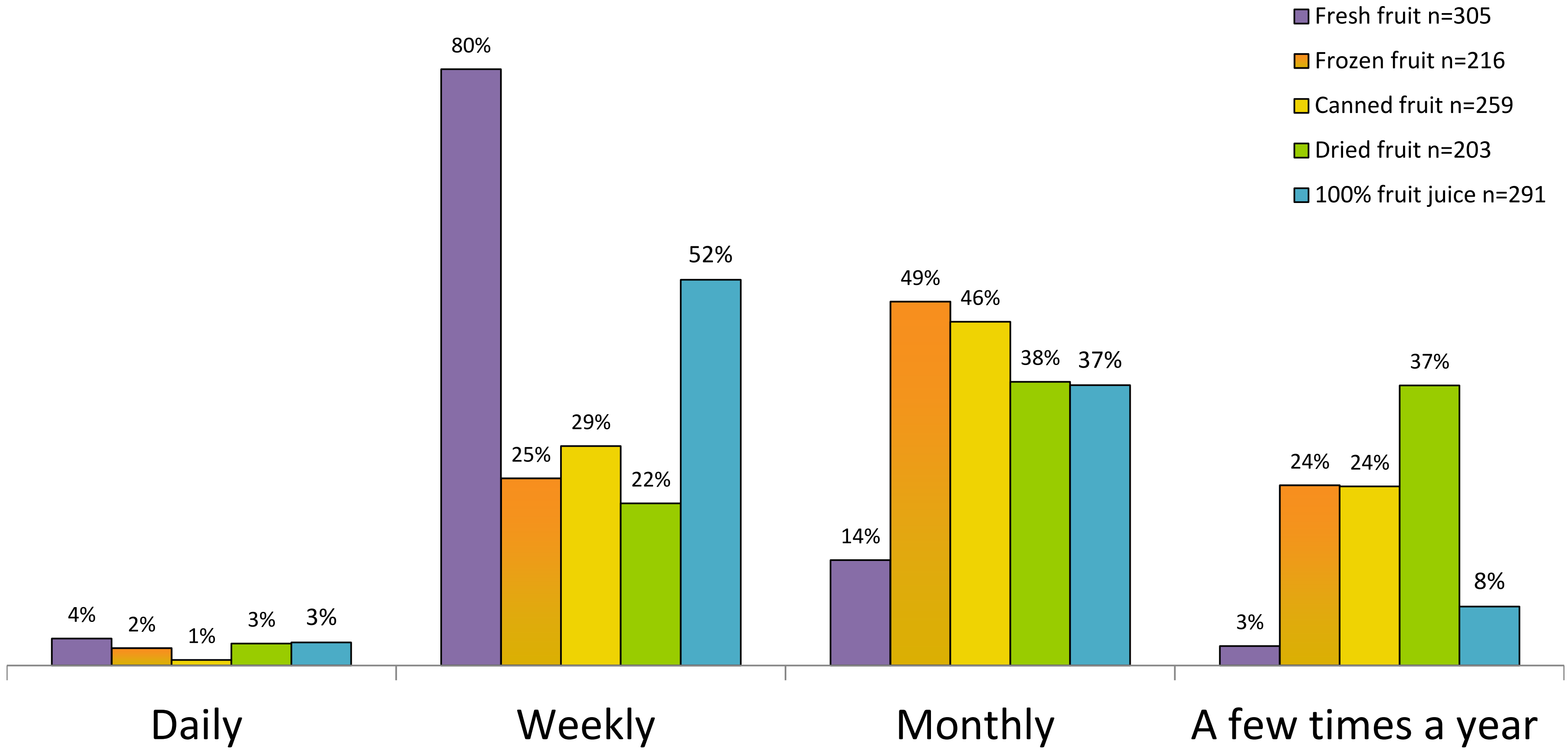
The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the reasons why they purchase the following:

100% Vegetable Juice	Pre-cut or Pre-Washed Vegetables	Freeze-Dried Vegetables	Vegetable Purees
Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because **I and/or my family likes them** (Married: 54% / Single: 40%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because it is **healthy** (Lower Income: 78% / Higher Income: 67%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers purchase because: ➢ **Tastes good** (Older: 66% / Younger: 46%); ➢ **I and/or my family likes them** (Older: 55% / Younger: 43%); ➢ **Easy to use** (Older: 41% / Younger: 24%); ➢ **Keep well** (Older: 31% / Younger: 22%); ➢ **Quick to prepare** (Older: 28% / Younger: 19%).	Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase because of **variety** (Lower Income: 24% / Higher Income: 16%). ➢ **Cost** (Lower Income: 20% / Higher Income: 13%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because: **Quality** (Older: 27% / Younger: 19%);	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase because they **tastes good** (Male: 39% / Female: 22%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase because they **keep well** (Married: 46% / Single: 31%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because they **keep well** (Older: 53% / Younger: 31%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase because they are **easy to use** (Older: 45% / Younger: 31%).

Q87/Q92/Q97/Q102. Why do you purchase <insert Item> (Base: Sample of All respondents who say that <insert item> is available in the home?)

The vast majority of Primary Shoppers buy fresh fruit on a weekly basis

Frequency of purchase of various forms of fruit

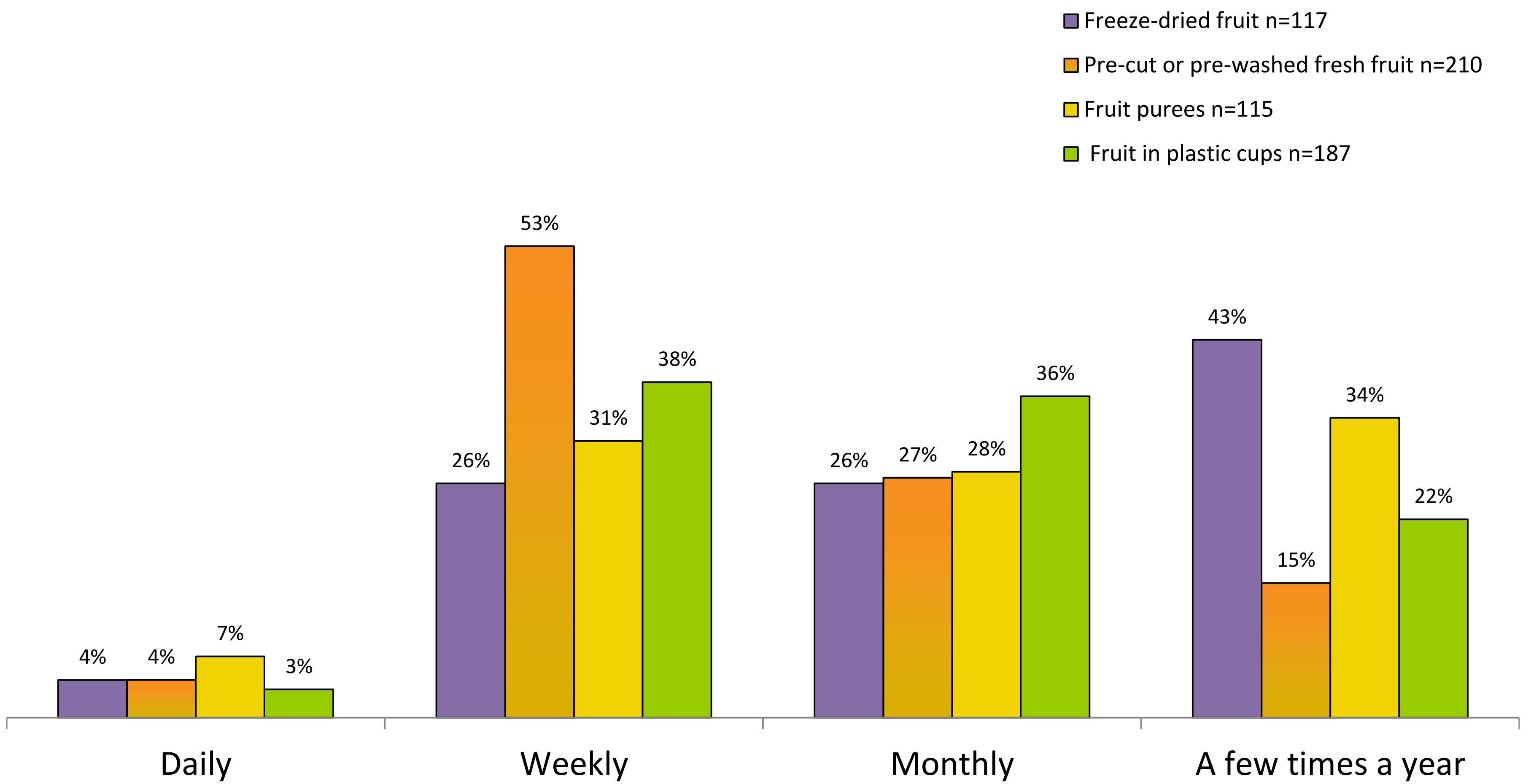


Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.
2012 Primary Shoppers Responses only

*Q23-43: How frequently do you purchase **[various forms of]** fruit?*

Just over half of Primary Shoppers buy pre-cut or pre-washed fruit on a weekly basis

Frequency of purchase of various forms of fruit

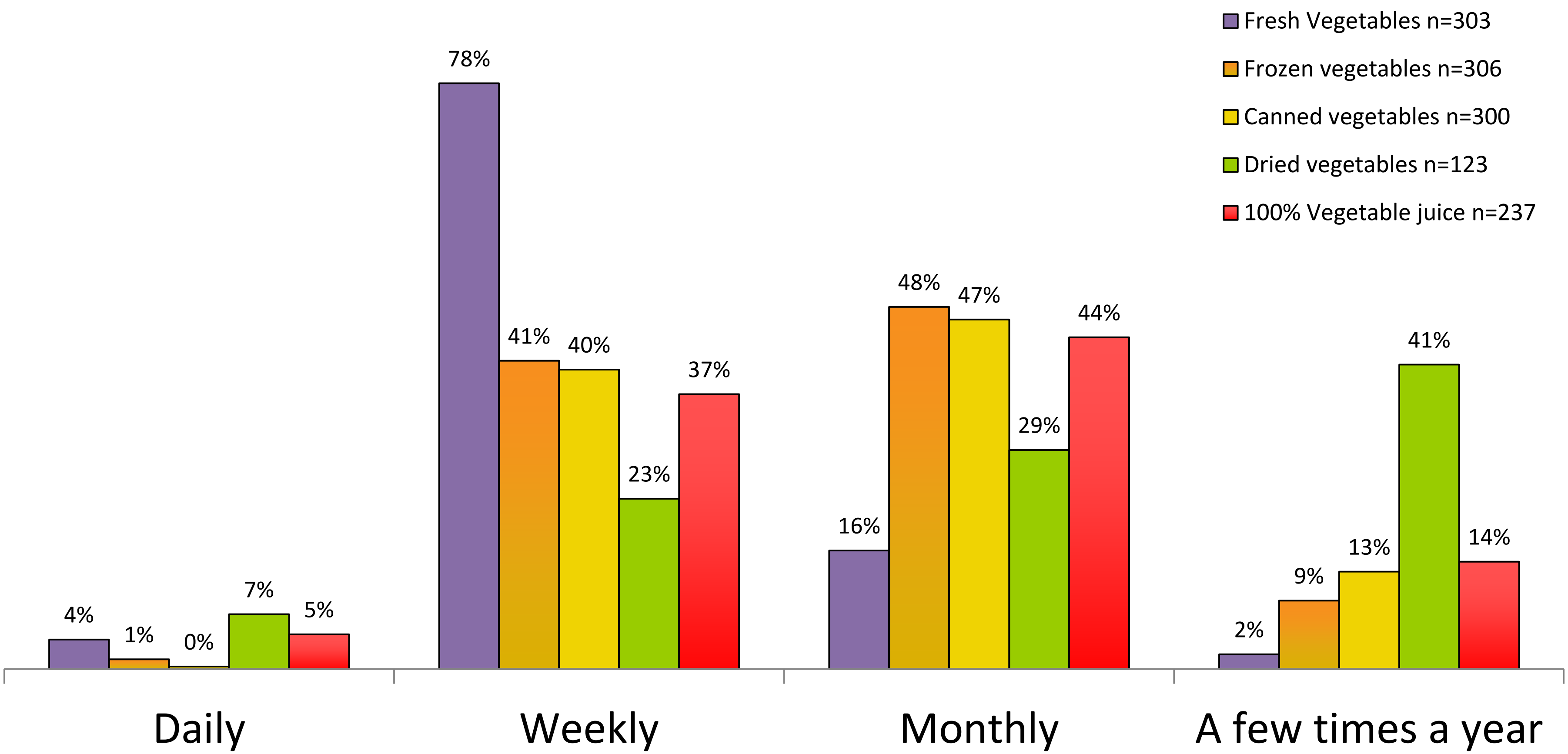


Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.
2012 Primary Shoppers Responses only

Q48-63: How frequently do you purchase [various forms of] fruit?

As with fresh fruit, the vast majority buy fresh vegetables on a weekly basis as well

Frequency of purchase of various forms of vegetables

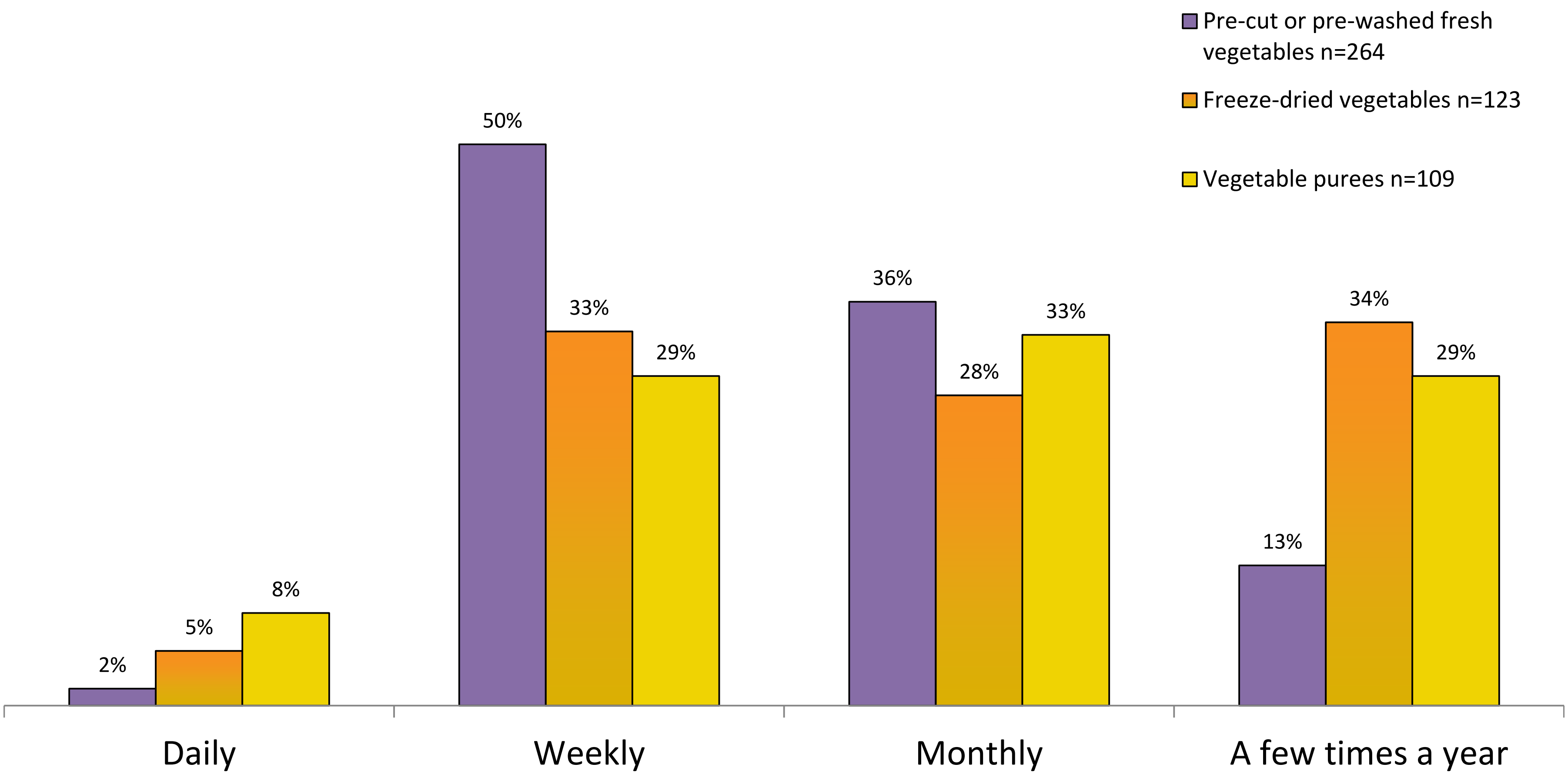


Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question <u>available in their homes.</u>
<u>2012 Primary Shoppers Responses only</u>

*Q68-88: How frequently do you purchase **<u>[various forms of]</u>** vegetables?*

Half of Primary Shoppers buy pre-cut or pre-washed vegetables on a weekly basis

Frequency of purchase of various forms of vegetables



Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.
2012 Primary Shoppers Responses only

*Q93-103: How frequently do you purchase **[various forms of]** vegetables?*

Frequency of Purchase

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the frequency of their purchases of:

Fresh Fruit	Frozen Fruit	Canned Fruit	Dried Fruit

Male vs. Female Primary Shoppers
➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase this **a few times a year** (Female: 4% / Male: 1%).
 	
Married vs. Single Primary Shoppers
➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase fresh fruit **monthly** (Single: 18% / Married: 9%).
 	
Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers
➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase fresh fruit **monthly** (Lower Income: 18% / Higher Income: 7%).
➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase fresh fruit **weekly** (Higher Income: 88% / Lower Income: 78%).
 	
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase fresh fruit **daily** (Younger: 7% / Older: 3%).
	Male vs. Female Primary Shoppers
	➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase frozen fruit **weekly** (Male: 32% / Female: 18%).
	➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase frozen fruit **a few times a year** (Female: 30% / Male: 18%).
	
	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
	➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase frozen fruit **daily** (Older: 4% / Younger: 1%).
		Married vs. Single Primary Shoppers
		➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase canned fruit **monthly** (Married: 47% / Single: 35%).
			Male vs. Female Primary Shoppers
			➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase dried fruit **weekly** (Male: 32% / Female: 12%).
			
			Married vs. Single Primary Shoppers
			➢ Single Primary Shoppers are more likely than Married Primary Shoppers to dried fruit **daily** (Single: 9% / Married: 2%).
			
			Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers
			➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase dried fruit **daily** (Lower Income: 5% / Higher Income: 2%).
			
			Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers
			➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase dried fruit :
			  ➢ **Weekly** (Younger: 35% / Older: 21%);
			  ➢ **Daily** (Younger: 7% / Older: 1%).
			➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase dried fruit **monthly** (Older: 45% / Younger: 30%).

Q23/Q28/Q33/Q38. How frequently do you purchase <insert Item> ? (Base: Sample of All respondents who say that <insert item> is available in the home).

Frequency of Purchase - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the frequency of their purchases of:

100% Fruit Juice	Freeze-Dried Fruit	Pre-Cut or Pre-Washed Fresh Fruit	Fruit Purees	Fruit in Plastic Cups
Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase 100% fruit juice **monthly** (Lower Income: 41% / Higher Income: 31%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase 100% fruit juice **weekly** (Higher Income: 59% / Lower Income: 49%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase 100% fruit juice **daily** (Younger: 7% / Older: 1%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase freeze-dried fruit ➢ **Weekly** (Younger: 39% / Older: 24%); ➢ **Daily** (Younger: 11%: Older: 2%). ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase freeze-dried fruit **monthly** (Older: 33% / Younger: 20%).	Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase pre-cut or pre-washed fresh fruit **daily** (Single: 12% / Married: 4%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase pre-cut or pre-washed fresh fruit **daily** (Younger: 9% / Younger: 3%).	Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase fruit purees **weekly** (Higher Income: 36% / Lower Income: 23%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase fruit purees **daily** (Younger: 11% / Older: 1%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase fruit in plastic cups **monthly** (Female: 43% / Male: 29%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase fruit in plastic cups **daily** (Younger: 6% / Older: 2%).

Q43/Q48/Q53/Q58/Q63. How frequently do you purchase <insert Item> ? (Base: Sample of All respondents who say that <insert item> is available in the home).

Frequency of Purchase - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the frequency of their purchases of:

Fresh Vegetables	Frozen Vegetables	Canned Vegetables	Dried Vegetables
Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase fresh vegetables **weekly** (Married: 82% / Single: 68%). ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase fresh vegetables **monthly** (Single: 24% / Married: 13%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase fresh vegetables **weekly** (Higher Income: 84%) / Lower Income: 72%). ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase fresh vegetables **monthly** (Lower Income: 24% / Higher Income: 10%).	Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase frozen vegetables **monthly** (Lower Income: 52% / Higher Income: 38%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase frozen vegetables **weekly** (Higher Income: 51% / Lower Income: 39%).	Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase canned vegetables **monthly** (Lower Income: 50% / Higher Income: 40%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase dried vegetables **weekly** (Male: 30% / Female: 14%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase dried vegetables **a few times a year** (Married: 41% / Single: 27%). ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase dried vegetables **daily** (Single: 16% / Married: 6%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase dried vegetables **monthly** (Older: 36% / Younger: 20%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase dried vegetables **daily** (Younger: 15% / Older: 2%).

Q68/Q73/Q78/Q83. How frequently do you purchase <insert Item> ? (Base: Sample of All respondents who say that <insert item> is available in the home).

Frequency of Purchase - continued

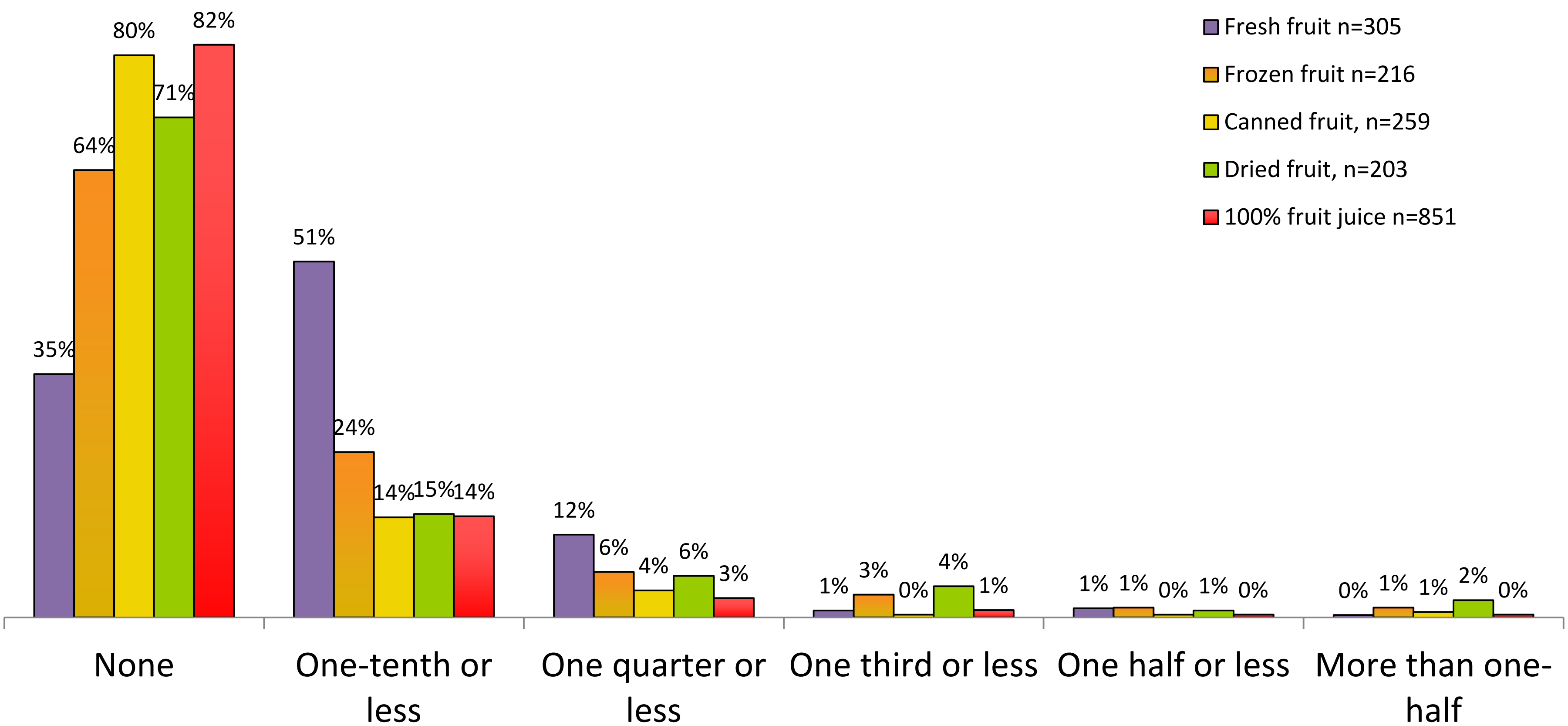
The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the frequency of their purchases of:

100% Vegetable Juice	Pre-cut or Pre-Washed Vegetables	Vegetable Purees
Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase 100% Vegetable Juice **weekly** (Male: 44% / Female: 28%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase 100% vegetable juice **monthly** (Married: 43% / Single: 31%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase 100% vegetable juice **daily** (Younger: 8% / Older: 2%).	Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase pre-cut or pre-washed vegetables **weekly** (Higher Income: 55% / Lower Income: 46%). ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase pre-cut or pre-washed vegetables **a few times a year** (Lower Income: 14% / Higher Income: 9%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase vegetable purees **weekly** (Male: 37% / Female: 18%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase vegetable purees **daily** (Single: 14% / Married: 4%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase vegetable purees **weekly** (Higher Income: 34% / Lower Income: 22%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase vegetable purees **daily** (Younger: 12% / Older: 2%).

Q88/Q93/Q98/Q103. How frequently do you purchase <insert Item> ? (Base: Sample of All respondents who say that <insert item> is available in the home).

Almost two-thirds of Primary Shoppers throw out at least some of the fresh fruit they buy

Amount of various forms of fruits that is thrown out



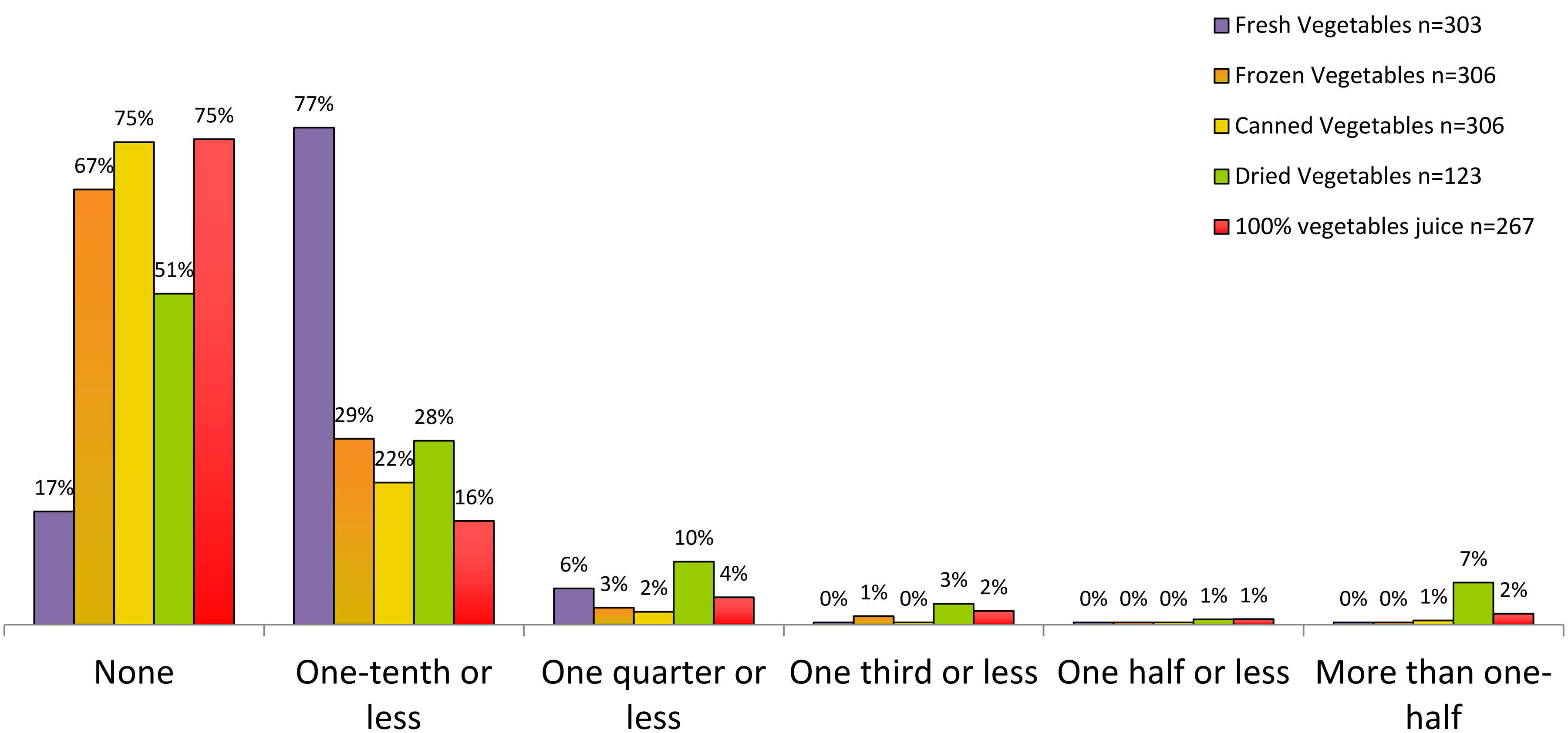
Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.

2012 Primary Shoppers Responses only

*Q25-45 .How much of **[various forms of]** fruits that you buy do you throw?*

Over 80% throw out at least some of the fresh vegetables they buy

Amount of various forms of vegetables that is thrown out



Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.
2012 Primary Shoppers Responses only

Q70-90: How much of the various forms of vegetables that you buy do you throw out?

Amount of Fruits and Vegetables Thrown Out

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the amount of fruits and vegetables thrown out:

Fresh Fruit	Frozen Fruit	Dried Fruit
Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to throw out **one-tenth or less** of fresh fruit (Married: 57% / Single: 45%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to throw out **none** of the fresh fruit (Lower Income: 33% / Higher Income: 24%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to throw out **one-third or less** of the fresh fruit (Higher Income: 5% / Lower Income: 1%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to throw out **none of the** frozen fruit (Female: 71% / Male: 57%). ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to throw out **one-quarter or less** of the frozen fruit (Male: 10% / Female: 3%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to throw out **none** of the frozen fruit (Married: 67% / Single: 53%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to throw out **none** of the frozen fruit (Older: 70% / Younger: 57%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **one quarter or less** of the frozen fruit (Younger: 11% / Older: 4%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to throw out **none** of the dried fruit (Male: 79% / Female: 64%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to throw out **none** of the dried fruit (Married: 69% / Single: 54%). Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to throw out **one-tenth or less** (Lower Income: 5% / Higher Income: 2%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to throw out **none** of the dried fruit (Older: 76% / Younger: 52%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **more than half** of the dried fruit (Younger: 5% / Older: 1%).

Q25/Q30/Q35/Q40. How much of the <insert Item> that you buy do you toss out? (Base: Sample of All respondents who say that <insert item> is available in the home)

Amount of Fruits and Vegetables Thrown Out - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the amount of fruits and vegetables thrown out:

Freeze-Dried Fruit	Pre-Cut or Pre-Washed Fresh Fruit	Fruit in Plastic Cups
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to throw out none of the freeze-dried fruit (Older: 33% / Younger: 20%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **one quarter or less** of the freeze-dried fruit.	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **none** of the pre-cut or pre-washed fresh fruit (Younger: 46% / Younger: 37%).	Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to throw out **one quarter or less** of the fruit in plastic cups (Single: 17% / Married: 7%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to throw out **none** of the fruit in plastic cups (Older: 82% / Younger: 63%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **one quarter or less** of the fruit in plastic cups (Younger: 16% / Older: 4%).

Q45/Q50/Q55/Q60/Q65. How much of the <insert Item> that you buy do you toss out? (Base: Sample of All respondents who say that <insert item> is available in the home)

Amount of Fruits and Vegetables Thrown Out - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the amount of fruits and vegetables thrown out:

Fresh Vegetables

Male vs. Female Primary Shoppers

- Female Primary Shoppers are more than likely than Male Primary Shoppers to throw out **one quarter or less** of the fresh vegetables (Female: 8% / Male: 3%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **one-tenth or less** of fresh vegetables (Younger: 76% / Older: 64%).
- Older Primary Shoppers are more likely than Younger Primary Shoppers to throw out **none** of the fresh vegetables (Older: 29% / Younger: 16%).

Dried Vegetables

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to throw out **none** of the dried vegetables (Male: 63% / Female: 42%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Older Primary Shoppers are more likely than Younger Primary Shoppers to throw out **none** of the dried vegetables (Older: 57% / Younger: 39%).
- Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **one quarter or less** of the dried vegetables (Younger: 17% / Older: 7%).

100% Vegetable Juice

Married vs. Single Primary Shoppers

- Married Primary Shoppers are more likely than Single Primary Shoppers to throw out **none** of the 100% vegetable juice (Married: 74% / Single: 54%).
- Single Primary Shoppers are more likely than Married Primary Shoppers to throw out **one quarter or less** of the 100% vegetable juice (Single: 13% / Married: 3%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Older Primary Shoppers are more likely than Younger Primary Shoppers to throw out **none** of the 100% vegetable juice (Older: 80% / Younger: 52%).
- Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **one quarter or less** 100% vegetable juice (Younger: 12% / Older: 3%).

Pre-cut or Pre-Washed Vegetables

Married vs. Single Primary Shoppers

Married Primary Shoppers are more likely than Single Primary Shoppers to throw out **none** of the pre-cut or pre-washed vegetables (Married: 47% / Single: 43%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **one third or less** of the pre-cut or pre-washed vegetables (Younger: 7% / Older: 3%).

Freeze-Dried Vegetables

Lower vs. Higher Annual Household Income (Under $50K vs. $50K and over) Primary Shoppers

- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to throw out **none** of the freeze-dried vegetables (Lower Income: 61% / Higher Income: 48%).
- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to throw out **one-tenth or less** of the freeze-dried vegetables (Higher Income: 33% / Lower Income: 21%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out **one quarter or less** of the freeze-dried vegetables (Younger: 16% / Older: 3%).

Vegetable Purees

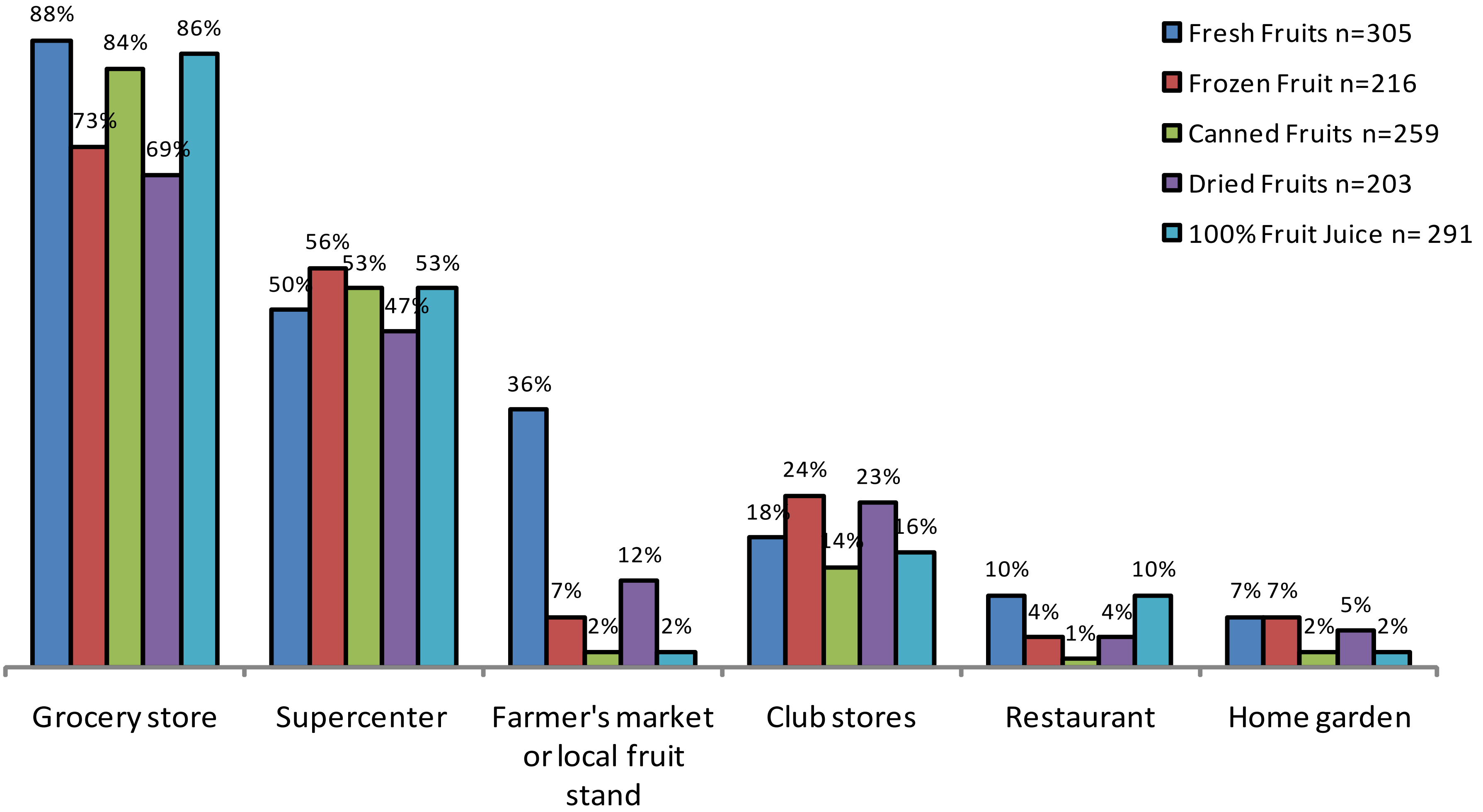
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to throw out:
  - **One quarter or less** of the vegetable purees (Younger: 20% / Older: 6%);
  - **One quarter or less** of the vegetable purees (Younger: 9% / Older: 2%).

Q70/Q75/Q80/Q85. How much of the <insert Item> that you buy do you toss out? (Base: Sample of All respondents who say that <insert item> is available in the home)

Grocery Stores are the most popular locations to buy all forms of fruits, followed by Supercenters

Popular locations to buy various forms of fruit

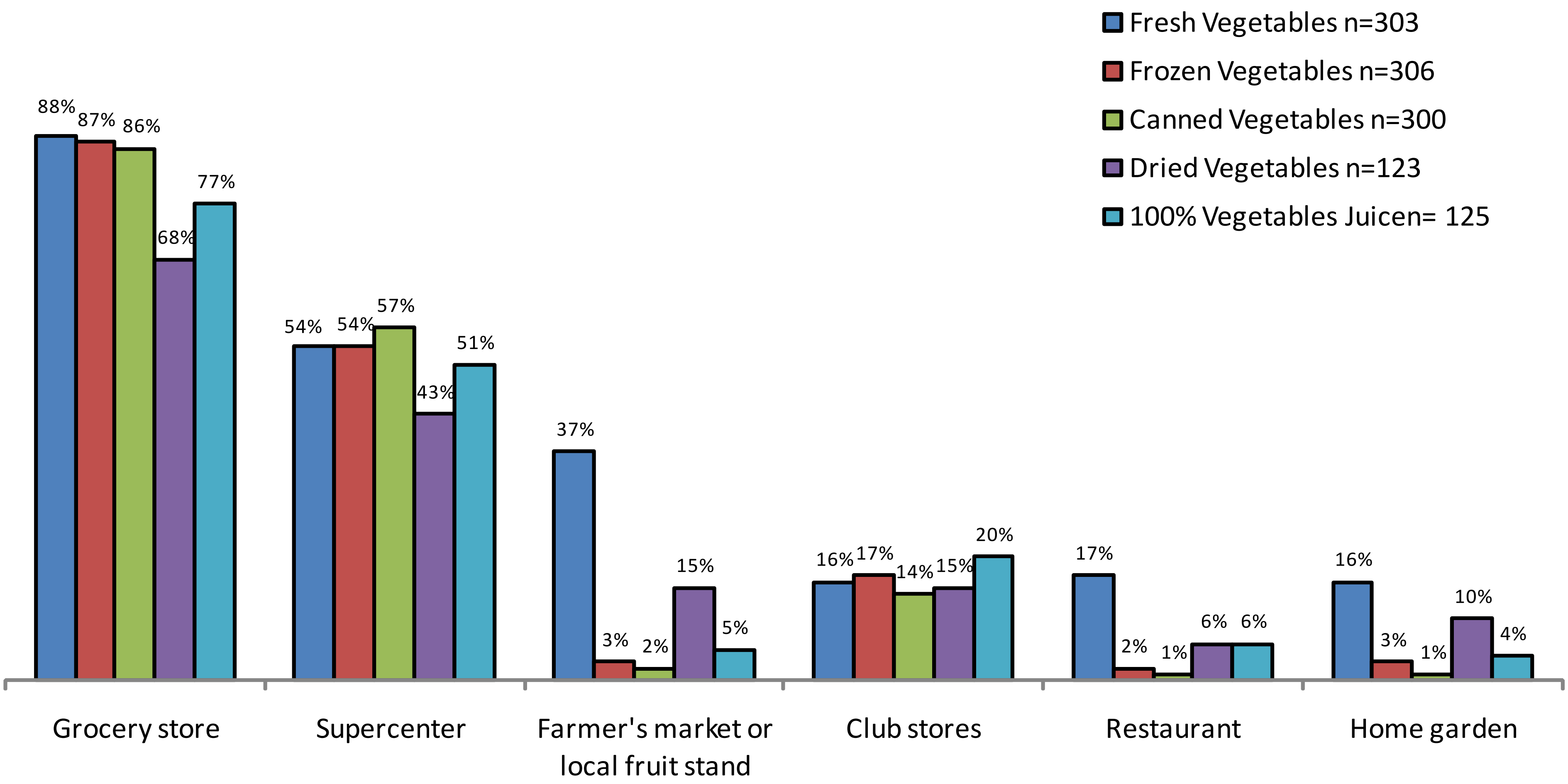


2012 Primary Shoppers Responses only

Thinking of the last 6 months, in which of the following locations have you gotten your various forms of fruit

Grocery Stores are also the most popular locations to buy all forms of vegetables, again followed by Supercenters

Popular locations to buy various forms of fruit and vegetables



2012 Primary Shoppers Responses only

Thinking of the last 6 months, in which of the following locations have you gotten your various forms of fruit

Locations where Fruits and Vegetables are purchased

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the locations of where they purchase:

Fresh Fruit	Frozen Fruit	Canned Fruit	Dried Fruit
Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase fresh fruit from: ➢ The **grocery stores** (Higher Income: 92% / Lower Income: 87%); ➢ **Club stores** (Higher Income: 23% / Lower Income: 11%).	Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase frozen fruit from **club stores** (Higher Income: 26% / Lower Income: 17%).	Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase canned fruit from the **dollar store** (Lower Income: 18% / Higher Income: 7%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase canned fruit from **club stores** (Higher Income: 16% / Lower Income: 10%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase dried fruit at a **drugstore** (Female: 13% / Male: 4%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to buy dried fruit: ➢ At **club stores** (Single: 21% / Married: 10%); ➢ At a **restaurant** (Single: 13% / Married: 2%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase dried fruit at **club stores** (Higher Income: 26% / Higher Income: 17%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase dried fruit : ➢ **At a farmer's market or local fruit stand** (Younger: 16% / Older: 10%); ➢ At a restaurant (Younger: 8% / Older: 1%); ➢ **At a vending machine** (Younger: 6% / Older: 2%) ➢ **A local CSA (Community-supported agriculture**) (Younger: 6% / Older: 1%).. ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase dried fruit at a **grocery store** (Older: 75% / Younger: 64%).

Q26/Q31/Q36/Q41. Thinking of the last six months, in which of the following locations have you gotten your <Insert Item> (Base: Sample of All respondents who say that <insert item> is available in the home?

Locations where Fruits and Vegetables are purchased - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the frequency of their purchases of:

100% Fruit Juice	Freeze-Dried Fruit	Pre-Cut or Pre-Washed Fresh Fruit	Fruit Purees	Fruit in Plastic Cups
Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase 100% fruit juice: ➢ **At a grocery store** (Single: 95% / Married: 85%); ➢ **At a convenience store/gas station** (Single: 25% / Married: 10%); ➢ **At a drug store** (Single: 14% / Married: 5%).. Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase 100% fruit juice **at a dollar store** (Lower Income: 13% / Higher Income: 6%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase 100% fruit juice **at club stores** (Higher Income: 23% / Lower Income: 12%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase: ➢ **At a supercenter** (Younger: 70% / Older: 57%); ➢ **At a convenience store** (Younger: 20%: Older: 7%); ➢ **At a vending machine** (Younger: 8% / Older: 2%). .	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase freeze-dried fruit **at a convenience store/gas station** (Female: 12% / Male: 2%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase freeze-dried fruit **at a convenience store/gas station** (Single: 15% / Married: 3%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase freeze-dried fruit: ➢ **At a home garden** (Younger: 12% / Older: 5%); ➢ **At a convenience/gas station** (Younger: 10% / Older: 3%); ➢ **At a local CSA (community-supported agriculture**) (Younger: 8% / Older: 1%)..	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase pre-cut or pre-washed fresh fruit: ➢ **At a farmer's market** (Male: 20% / Female: 8%); ➢ **At a home garden** (Male: 10% / Female: 3%); ➢ **At a convenience store/gas station** (Male: 8% / Female: 2%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase fresh fruit ➢ **At a restaurant** (Single: 16% / Married: 7%); ➢ **At a convenience/gas station** (Single: 12% / Married: 4%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase pre-cut or pre-washed fresh fruit **at club stores** (Higher Income: 24% / Lower Income: 14%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase pre-cut or pre-washed fresh fruit: ➢ **At a convenience store/gas station** (Younger: 10% / Older: 2%); ➢ **At a local CSA (community-supported agriculture**) (Younger: 5% / Older: 1%). ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase pre-cut or pre-washed fruit **at a grocery store** (Older: 83% / Younger: 73%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase fruit purees: ➢ **At a farmer's market or local fruit stand** (Male: 19% / Female: 5%); ➢ **At a convenience store** (Male:11% / Female: 2%) . Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase fruit purees **at a convenience store/gas station** (Single: 14% / Married: 4%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase fruit purees: ➢ **At a supermarket** (Younger: 58% / Older: 43%); ➢ **At a convenience store/gas station** or **at a restaurant** (Younger: 9% / Older: 4%); ➢ **At a local CSA (Community-supported agriculture)** (Younger: 6% / Older: 1%). ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers purchase fruit purees **at a grocery store** (Older: 71% / Younger: 53%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase fruit in plastic cups: ➢ **At a convenience store** (Male: 11% / Female: 1%); ➢ **At a vending machine** (Male: 7% / Female: 1%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase fruit in plastic cups: ➢ **At a convenience store/gas station** (Single: 14% / Married: 3%); ➢ **At a farmer's market or local fruit stand** (Single: 12% / Married: 3%).. Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase fruit in plastic cups **at a dollar store** (Lower Income: 16% / Higher Income: 8%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase fruit in plastic cups **at club stores** (Higher Income: 21% / Lower Income: 13%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase fruit in plastic cups: ➢ **At a farmer's market or local fruit stand** (Younger: 8% / Older: 2%); ➢ **At a convenience store/gas station** (Younger: 7% / Older: 3%).

Q46/Q51/Q56/Q61/Q66. Thinking of the last six months, in which of the following locations have you gotten your <Insert Item> (Base: Sample of All respondents who say that <insert item> is available in the home?

Locations where Fruits and Vegetables are purchased - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the frequency of their purchases of:

Fresh Vegetables	Frozen Vegetables	Canned Vegetables	Dried Vegetables
Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase fresh vegetables: ➢ **At club stores** (Married: 19% / Single: 10%); ➢ **At a home garden** (Married: 18% / Single: 7%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase fresh vegetables: ➢ **At a farmer's market or local fruit stand** (Higher Income: 38% / Lower Income: 29%); ➢ **At a restaurant** (Higher Income: 17% / Lower Income: 10%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase fresh vegetables: ➢ **At club stores or at a home garden** (Older: 18% / Younger: 12%).	Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase frozen vegetables: ➢ **At club stores** (Higher Income: 19% / Lower Income: 13%); ➢ **At a restaurant** (Higher Income: 3% / Lower Income: 1%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase canned vegetables **at club stores** (Male: 19% / Female: 10%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase canned vegetables **at dollar stores** (Lower Income: 15% / Higher Income: 9%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase canned vegetables **at club stores** (Higher Income: 17% / Lower Income: 10%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase canned vegetables **at a supercenter** (Younger: 73% / Older: 59%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase dried vegetables **at club stores** (Male: 22% / Female: 5%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase dried vegetables **at a local CSA (community-support agriculture)** (Single: 17% / Married: 4%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase dried vegetables: ➢ **At club stores** (Higher Income: 20% / Lower Income: 11%); ➢ **At restaurants** (Higher Income: 9% / Lower Income: 3%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase dried vegetables **at a grocery store** (Older: 73% / Younger: 61%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase dried vegetables: ➢ **At a local CSA (Community-supported agriculture)** or **at a restaurant** (Younger: 11% / Older: 3%); ➢ **At a convenience store** (Younger: 10% / Older: 2%); ➢ **At a drugstore** (Younger: 8% / Younger: 1%).

Q71/Q76/Q81/Q86. Thinking of the last six months, in which of the following locations have you gotten your <Insert Item> (Base: Sample of All respondents who say that <insert item> is available in the home?

Locations where Fruits and Vegetables are purchased - continued

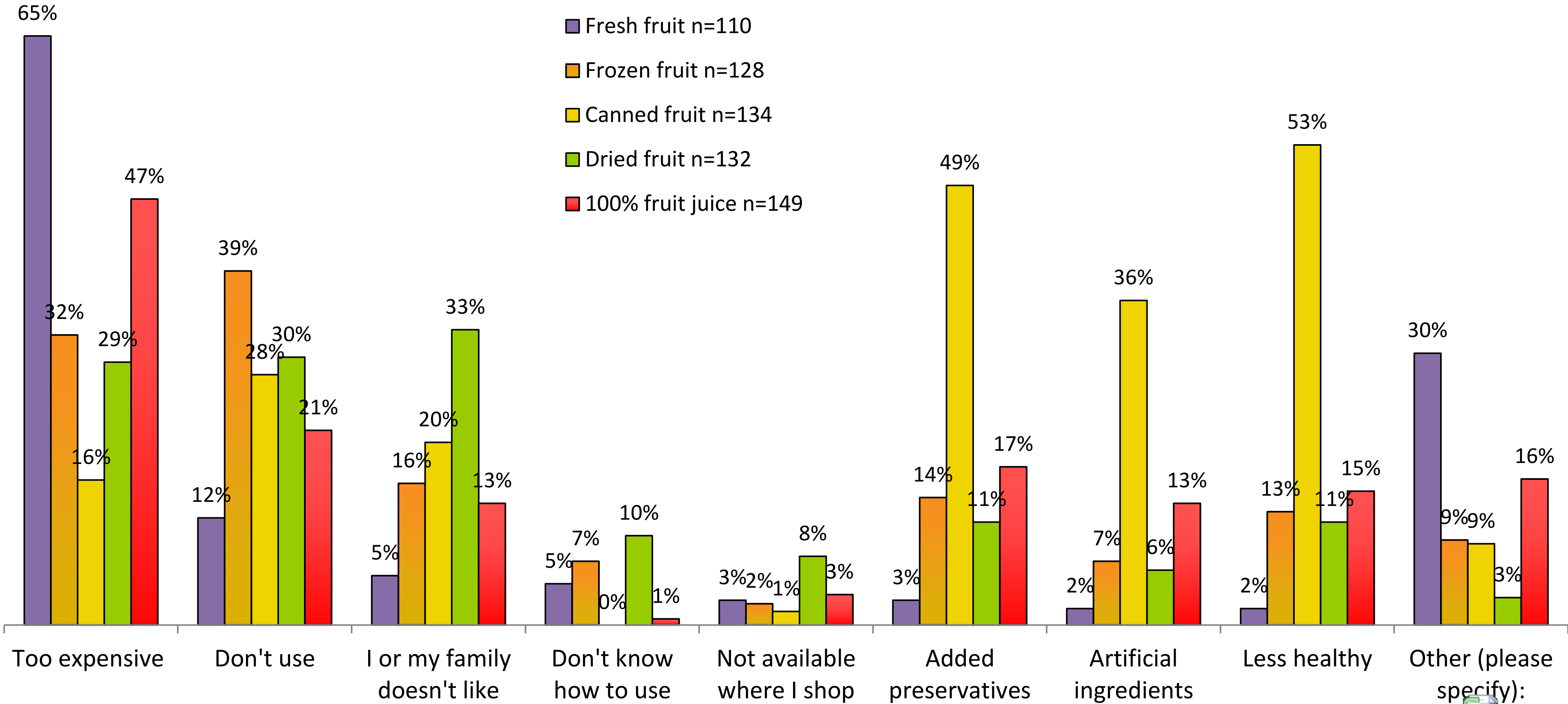
The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the frequency of their purchases of:

100% Vegetable Juice	Pre-cut or Pre-Washed Vegetables	Freeze-Dried Vegetables	Vegetable Purees
Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase 100% vegetable juice **at a restaurant** (Male: 9% / Female: 3%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase 100% vegetable juice: ➢ **At a convenience store/gas station** (Single: 21% / Married: 7%); ➢ **At a drugstore** (Single: 15% / Married: 5%); ➢ **At a farmer's market or local fruit stand** (Single: 13% / Married: 4%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase 100% vegetable juice: ➢ **At a convenience store/gas station** (Younger: 15% / Older: 6%); ➢ **At a vending machine** (Younger: 9% / Older: 3%).	Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase pre-cut or pre-washed vegetables: ➢ **At a farmer's market or local fruit stand** (Single: 22% / Married: 11%); ➢ **At a restaurant** (Single: 11% / Married: 4%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase pre-cut or pre-washed vegetables: ➢ **At a supercenter** (Lower Income: 60% / Higher Income: 51%); ➢ **At a farmer's market or local fruit stand** (Lower Income: 16% / Higher Income: 10%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase pre-cut or pre-washed vegetables **at club stores** (Higher Income: 19% / Lower Income: 10%).	Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase freeze-dried vegetables **at a convenience store/gas station** (Single: 15% / Married: 3%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase freeze-dried vegetables **at a farmer's market or local fruit stand** (Higher Income: 15% / Lower Income: 6%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers purchase freeze-dried vegetables **at a grocery store** (Older: 77% / Younger: 57%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers to purchase vegetables purees: ➢ **At club stores** (Male: 31% / Female: 2%); ➢ **At a farmer's market or local fruit stand** (Male: 23% / Female: 7%); ➢ **At a convenience store/gas station** (Male: 20% / Female: 2%); ➢ **At a restaurant** (Male: 14% / Female: 2%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to purchase vegetable purees: ➢ **At a convenience store/gas station** (Single: 18% / Married: 6%); ➢ **At a dollar store** (Single: 12% /Married: 3%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase vegetable purees **at a grocery store** (Older: 74% / Younger: 58%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase vegetable purees: ➢ **At a convenience store** (Younger: 13% / Older: 5%); ➢ **At a restaurant** (Younger: 11% / Older: 4%); ➢ **At a dollar store** (Younger: 8% / Older: 2%).

Q91/Q96/Q101/Q106. Thinking of the last six months, in which of the following locations have you gotten your <Insert Item> (Base: Sample of All respondents who say that <insert item> is available in the home?

Primary Shoppers do not have canned fruit available for health reasons, whereas cost is the main factor for fresh fruit and fruit juice

Reasons why various forms of fruit are not usually available in Primary Shoppers' homes



Microsoft Office el 97-2003 Worksh

Click on Excel file for "Other" Responses

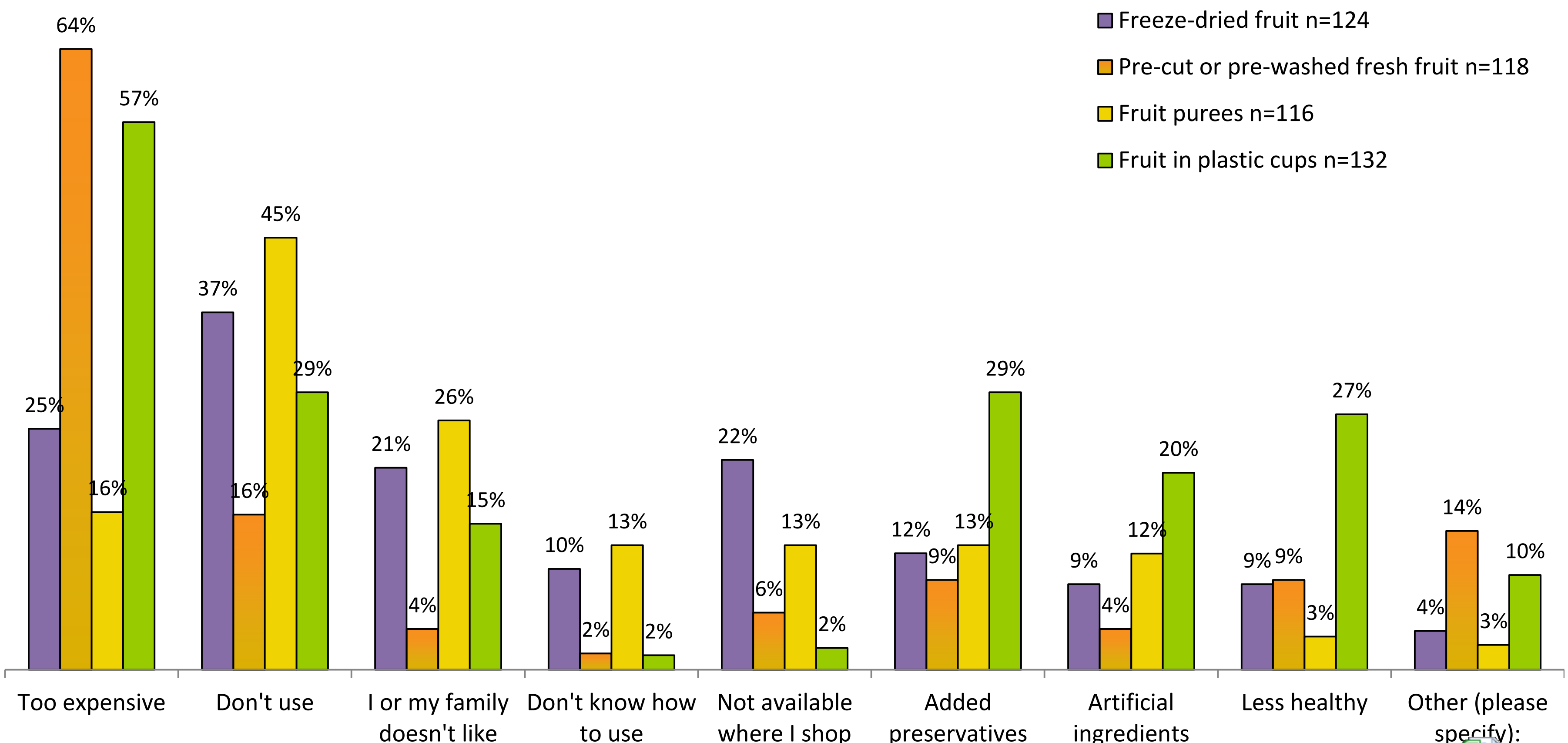
Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question <u>not available in their homes.</u>

<u>2012 Primary Shoppers Responses only</u>

Q135-139 : What reasons best describe why various forms of fruit are not usually available in your home?

Cost is also the primary reason why pre-cut or pre-washed fruit and fruit in plastic cups are not available

Reasons why various forms of fruit are not usually available in Primary Shoppers' homes



Microsoft Office el 97-2003 Worksh

Click on Excel file for "Other" Responses

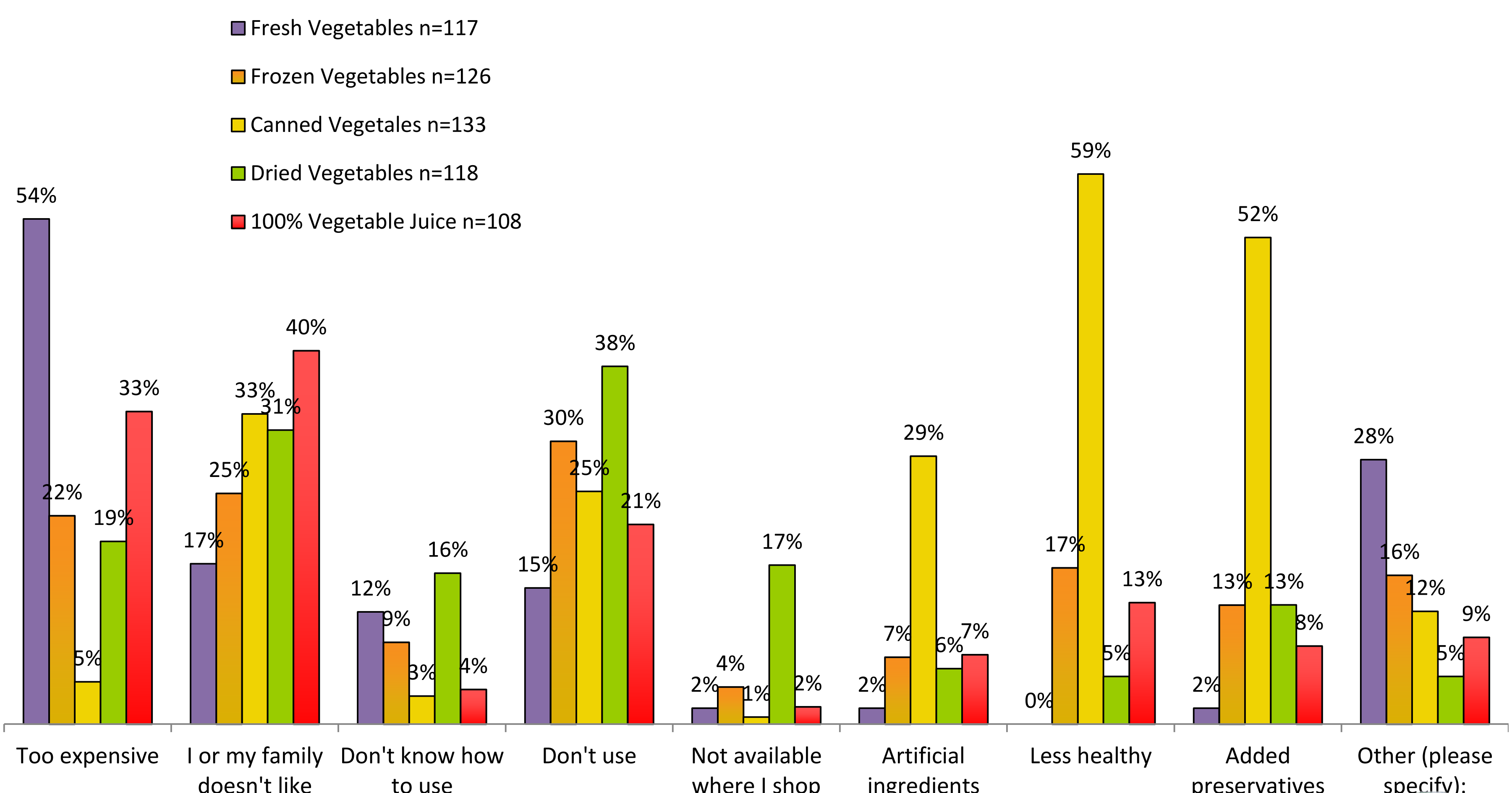
Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question not available in their homes.

2012 Primary Shoppers Responses only

Q140-143, etc: What reasons best describe why various forms of fruit are not usually available in your home?

Canned vegetables are perceived to be similar to canned fruit - less healthy, whereas fresh vegetables are too expensive

Reasons why various forms of vegetables are not usually available in Primary Shoppers' homes



Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question not available in their homes.
2012 Primary Shoppers Responses only

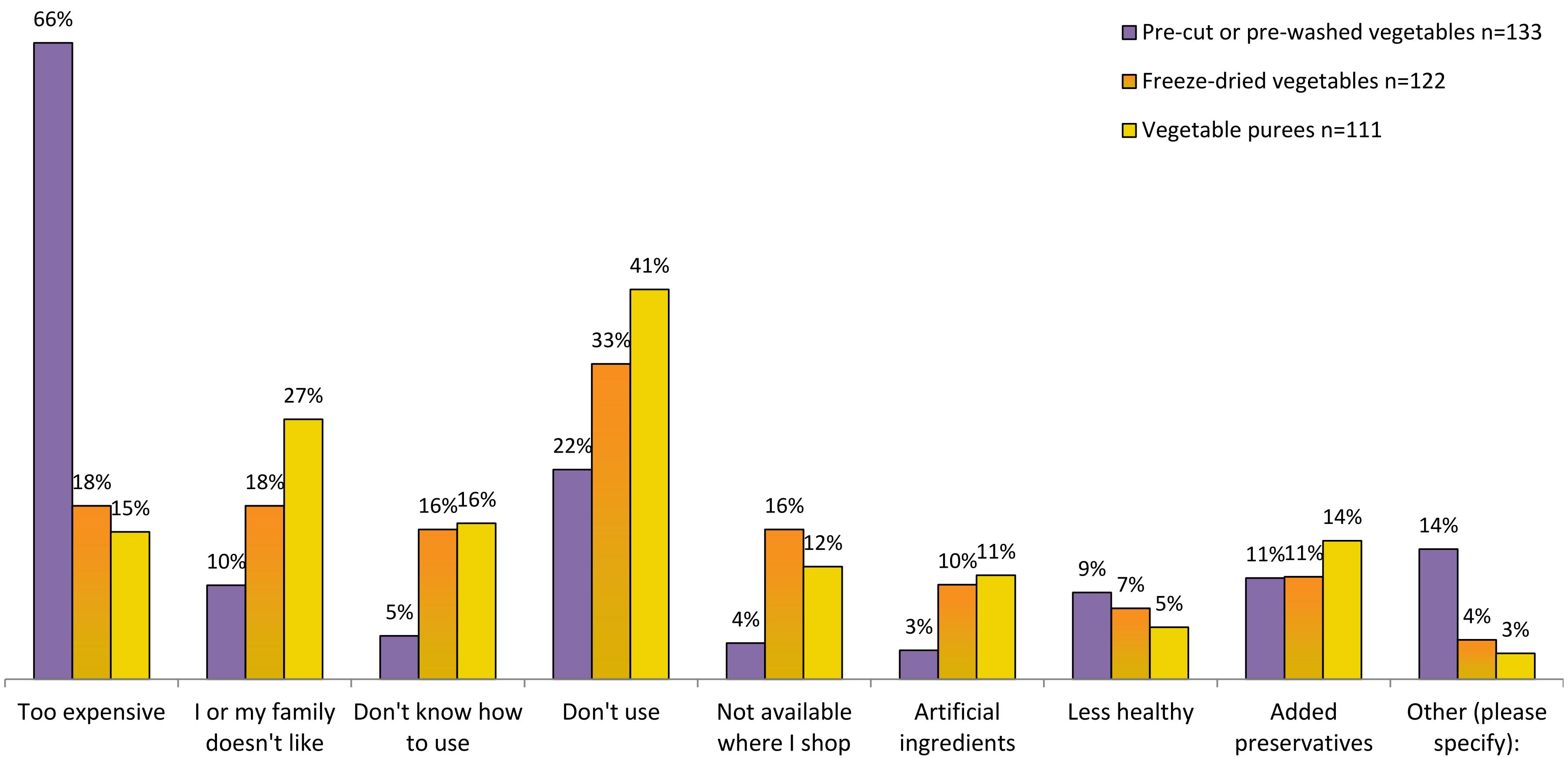
Microsoft Office Excel 97-2003 Worksheet

Click on Excel file for "Other" Responses

Q144, etc: What reasons best describe why various forms of vegetable are not usually available in your home?

Two-thirds of Primary Shoppers do not have pre-cut or pre-washed vegetables available because they believe them to be too expensive

Reasons why various forms of vegetables are not usually available in Primary Shoppers' homes



Microsoft Office el 97-2003 Worksh

Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question <u>not available in their homes.</u>
<u>2012 Primary Shoppers Responses only</u>

Click on Excel file for "Other" Responses

Q149-151 What reasons best describe why various forms of vegetable are not usually available in your home?

Reasons why Fruits and Vegetables Unavailable in the Home

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the reasons fruits and vegetables are not available in the home:

Dried Fruit	Canned Fruit	100% Fruit Juice	Freeze-Dried Fruit
<u>Male vs. Female Primary Shoppers</u> ➢ Male Primary Shoppers are more likely than Female Primary Shoppers not to have dried fruit in the home because they **<u>don't use</u>** it (Male: 39% / Female: 21%). <u>Married vs. Single Primary Shoppers</u> ➢ Single Primary Shoppers are more likely than Married Primary Shoppers not to have dried fruit in the house because they **<u>Don't use</u>** it (Single: 41% / Married: 24%).	<u>Male vs. Female Primary Shoppers</u> ➢ Females Primary Shoppers are more likely than Male Primary Shoppers not to have canned fruit in the home because it is **<u>less healthy</u>** (Female: 62% / Male: 41%).	<u>Married vs. Single Primary Shoppers</u> ➢ Single Primary Shoppers are more likely than Married Primary Shoppers not to have 100% fruit juice in the home because **<u>I and/or my family doesn't</u>** like it (Single: 22% / Married: 9%). <u>Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers</u> ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers not to have 100% fruit juice in the home because it is **<u>too expensive</u>** (Lower Income: 60% / Higher Income: 41%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to not have 100% fruit juice in the home because it is **<u>less healthy</u>** (Higher Income: 28% / Lower Income: 12%). <u>Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers</u> ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers not to have 100% fruit juice in the home because it is **<u>less healthy</u>** (Younger: 30% / Older: 15%).	<u>Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers</u> ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers not to have freeze-dried fruit in the home because it is **<u>too expensive</u>** (Lower Income: 62% / Higher Income: 41%). ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to not have freeze-dried fruit in the home: because of: ➢ **<u>Added preservatives</u>** (Higher Income: 19% / Lower Income: 5%); ➢ **<u>Artificial ingredients</u>** (Higher Income: 11% / Lower Income: 5%); ➢ **<u>Never heard of this type of fruit</u>** (Higher Income: 9% / Lower Income: 3%).

Q135-138. What reasons best describes why <insert item> is not usually available in your home? (Base: Sample of All respondents who say that <insert item> is not available in the home)

Reasons why Fruits and Vegetables Unavailable in the Home - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the reasons fruits and vegetables are not available in the home:

Pre-Cut or Pre-Washed Fresh Fruit	Fruit in Plastic Cups
Male vs. Female Primary Shoppers ➢ Females Primary Shoppers are more likely than Male Primary Shoppers not to have pre-cut or pre-washed fresh fruit in the home because it is **too expensive** (Female: 79% / Male: 50%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers not to have pre-cut or pre-washed fresh fruit in the home because it is **too expensive** (Older: 69% / Younger: 53%).	Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers not to have fruit in plastic cups in the home because they are **too expensive** (Single: 52% / Married: 35%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers not to have fruit in plastic cups in the home because it is **too expensive** (Lower Income: 60% / Higher Income: 41%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers not to have fruit in plastic cups in the home because it is **less healthy** (Younger: 44% / Older: 26%).

Q135-138. What reasons best describes why <insert item> is not usually available in your home? (Base: Sample of All respondents who say that <insert item> is not available in the home)

Reasons why Fruits and Vegetables Unavailable in the Home - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the reasons fruits and vegetables are not available in the home:

Fresh Vegetables	Frozen Vegetables	Canned Vegetables	Dried Vegetables
Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Female Primary Shoppers not to have fresh vegetables in the home because they **don't know how to use** them (Male: 19% / Female: 4%). Married vs. Single Primary Shoppers ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to not to have fresh vegetables in the home because they **don't know how to use** them (Single: 24% / Single: 11%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to not to have fresh vegetables in the home because they are **too expensive** (Lower Income: 68% / Higher Income: 50%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers not to have fresh vegetables in the home because they **don't know how to use** them (Younger: 21% / Older: 8%).	Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers not to have frozen vegetables in the home because they are **less healthy** (Higher Income: 28% / Lower Income: 16%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers not to have canned vegetables in the home because they have **added preservatives** (Female: 62% / Male: 39%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to have canned vegetables in the home because they are **less healthy** (Higher Income: 62% / Lower Income: 50%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Male Primary Shoppers to have dried vegetables in the home because they have **added preservatives** (Female: 19% / Male: 7%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to have dried vegetables in the home because they have **added preservatives** (Older: 15% / Younger: 7%).

Q144-147. What reasons best describes why <insert item> is not usually available in your home? (Base: Sample of All respondents who say that <insert item> is not available in the home)

Reasons why Fruits and Vegetables Unavailable in the Home - continued

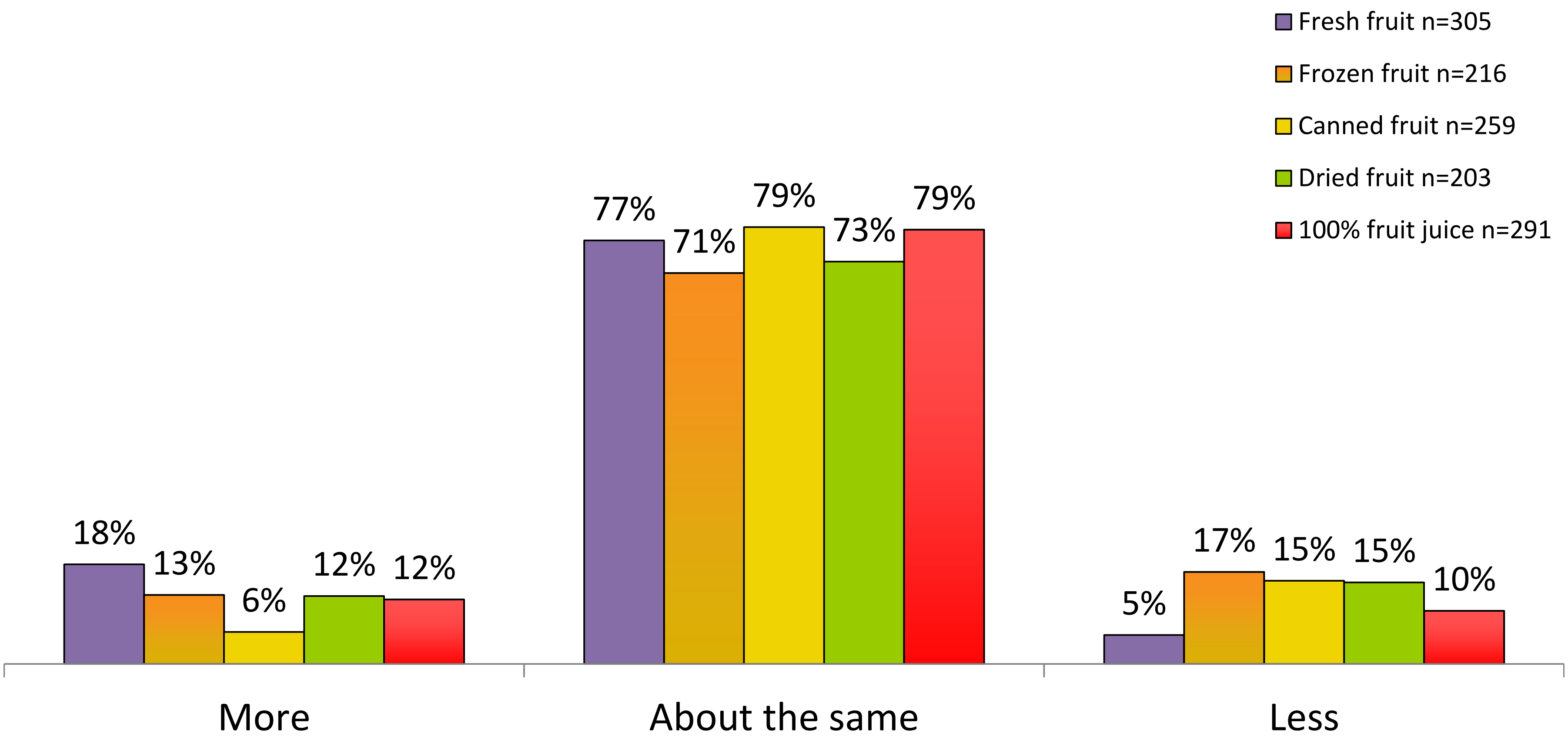
The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the reasons why fruits and vegetables are not available in the home:

100% Vegetable Juice	Pre-cut or Pre-Washed Vegetables	Freeze-Dried Vegetables	Vegetable Purees
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers not to have 100% vegetable juice because it is **too expensive** (Older: 34% / Younger: 21%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to not to have pre-cut or pre-washed vegetables because they are: ➢ **Added perspectives** (Female: 17% / Male: 4%); ➢ **Less healthy** (Female: 14% / Male: 4%). Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to have pre-cut or pre-washed vegetables in the home because they have **added preservatives** (Married: 15% / Single: 6%). ➢ Single Primary Shoppers are more likely than Married Primary Shoppers to have pre-cut or pre-washed vegetables in the home because they **don't know how to use** them (Single: 14% / Married: 2%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers not to have pre-cut ore pre-washed vegetables in the home because they are **too expensive** (Older: 73% / Younger: 55%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers not to have freeze-dried vegetables in the home because they: ➢ **Don't know how to use** them (Younger: 25% / Older: 12%); ➢ **Less healthy** (Younger: 14% / Older: 4%).	Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers not to have vegetable purees in the home because they **don't know how to use** them (Higher Income: 25% / Lower Income: 14%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers not to have vegetable purees in the home because **I and/or my family doesn't like** them (Younger: 44% / Older: 30%).

Q148-151 . What reasons best describes why <insert item> is not usually available in your home? (Base: Sample of All respondents who say that <insert item> is not available in the home)

Almost one-in-five Primary Shoppers believe they have purchased more fresh fruit than they did a year ago

Amount of various forms of fruit purchased in the past 3 months compared to one year earlier by Primary Shoppers

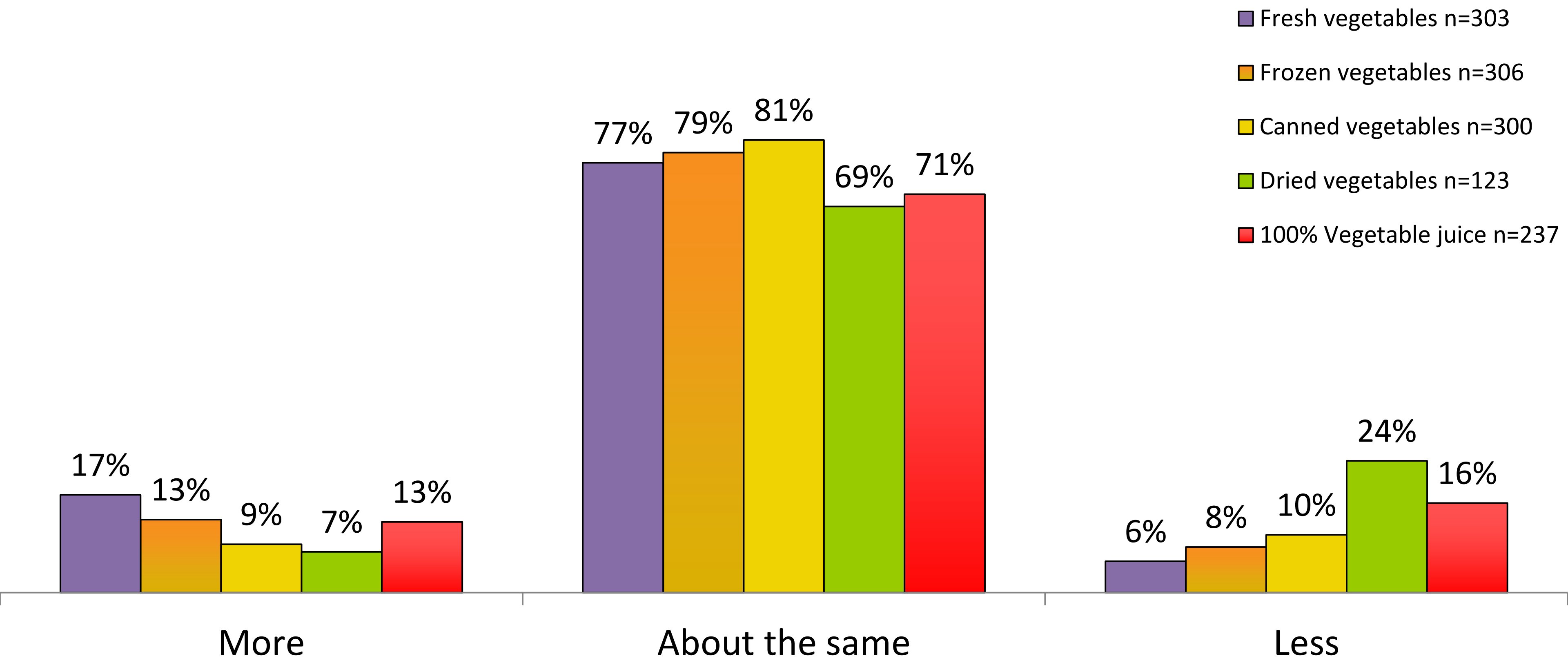


Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.
2012 Primary Shoppers only

Q24-44: Did you buy more, less, or the same amount of various forms of fruit in the past 3 months compared to one year earlier?

The same is true for fresh vegetables – almost one-in-five say they have purchased more than they did last year

Amount of various forms of vegetables purchased in the past 3 months compared to one year earlier by Primary Shoppers



Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.
2012 Primary Shoppers Responses only

Q69-89: Did you buy more, less, or the same amount of various forms of fruit in the past 3 months compared to one year earlier?

Fruits and Vegetable Purchases Compared to One Year Earlier

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the purchases of fruits and vegetables during the past three months compared to one year earlier:

Fresh Fruit	Frozen Fruit	Canned Fruit	Dried Fruit
Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to have purchased **about the same** amount of fresh fruit during the past three months compared to one year ago (Higher Income: 74% / Lower Income: 65%). ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to have purchased **less** fresh fruit during the past three months compared to one year ago (Lower Income: 8% / Higher Income: 4%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** fresh fruit during the past three months compared to one year ago (Younger: 36% / Older: 19%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase **about the same** amount of frozen fruit during the past three months compared to one year ago (Older: 76% / Younger: 58%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** frozen fruit during the past three months compared to one year ago (Younger: 20% / Older: 9%).	Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase **about the same** amount of canned fruit during the past three months compared to one year ago (Higher Income: 81% / Lower Income: 70%). ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase **more** canned fruit compared to one year ago(Lower Income: 14% / Higher Income: 6%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** canned fruit during the past three months compared to one year ago (Younger: 17% / Older: 7%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase **about the same** amount of dried fruit during the past three months compared to one year ago (Older: 75% / Younger: 66%).

Q24/Q29/Q34/Q39. Did you buy less, more or about the same amount of <Insert Item> in the past three months compared to one year earlier? (Base: Sample of All respondents who say that <insert item> is available in the home?

Fruits and Vegetable Purchases Compared to One Year Earlier - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the purchases of fruits and vegetables during the past three months compared to one year earlier:

100% Fruit Juice	Pre-Cut or Pre-Washed Fresh Fruit	Fruit Purees	Fruit in Plastic Cups
Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to have purchased **about the same** amount of 100% fruit juice during the past three months compared to one year ago (Higher Income: 78% / Lower Income: 70%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to have purchased **about the same** amount of 100% fruit juice during the past three months compared to one year ago (Older: 79% / Younger: 63%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase **more** 100% fruit juice during the past three months compared to one year ago (Younger: 25% / Older: 11%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase **about the same** amount of pre-cut or pre-washed fresh fruit during the past three months compared to one year ago (Older: 74% / Younger: 62%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** during the past three months compared to one year ago (Younger: 22% / Older: 14%).	Married vs. Single Primary Shoppers ➢ Married Primary Shoppers are more likely than Single Primary Shoppers to purchase **about the same** amount of fruit purees during the past three months compared to one year ago (Married: 67% / Single: 52%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to have purchased **more** fruit purees during the past three months compared to one year ago (Younger: 21% / Older: 11%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to have purchased **about the same** amount of fruit in plastic cups during the past three months compared to one year ago. (Older: 69% / Younger: 59%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers purchase **more** fruit in plastic cups during the past three months compared to one year ago (Younger: 26% / Older: 16%).

Q44/Q49/Q54/Q59/Q64. Thinking of the last six months, in which of the following locations have you gotten your <Insert Item> (Base: Sample of All respondents who say that <insert item> is available in the home?

Fruits and Vegetable Purchases Compared to One Year Earlier - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the purchases of fruits and vegetables during the past three months compared to one year earlier:

Fresh Vegetables	Frozen Vegetables	Canned Vegetables	Dried Vegetables
Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase **less** fresh vegetables during the past three months compared to one year earlier (Female: 8% / Male: 3%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase **about the same** amount of fresh vegetables during the past three months compared to one year earlier (Older: 76% / Younger: 64%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** fresh vegetables during the past three months compared to one year earlier (Younger: 29% / Older: 16%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase **more** frozen vegetables during the past three months compared to one year earlier (Female: 17% / Male: 8%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase **about the same** amount of frozen vegetables during the past three months compared to one year earlier (Older: 79% / Younger: 64%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** frozen vegetables during the past three months compared to one year earlier (Younger: 26% / Older: 13%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase **about the same** amount of canned vegetables during the past three months compared to one year earlier (Older: 82% / Younger: 70%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more canned** vegetables during the past three months compared to one year earlier (Younger: 18% / Older: 8%).	Male vs. Female Primary Shoppers ➢ Female Primary Shoppers are more likely than Male Primary Shoppers to purchase **less** dried vegetables during the past three months compared to one year earlier (Female: 32% / Male: 16%). Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **less** dried vegetables during the past three months compared to one year earlier (Younger: 15% / Older: 7%).

Q69/Q74/Q79/Q84. Did you buy less, more or about the same amount of <Insert Item> in the past three months compared to one year earlier? (Base: Sample of All respondents who say that <insert item> is available in the home?

Fruits and Vegetable Purchases Compared to One Year Earlier - continued

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the purchases of fruits and vegetables during the past three months compared to one year earlier:

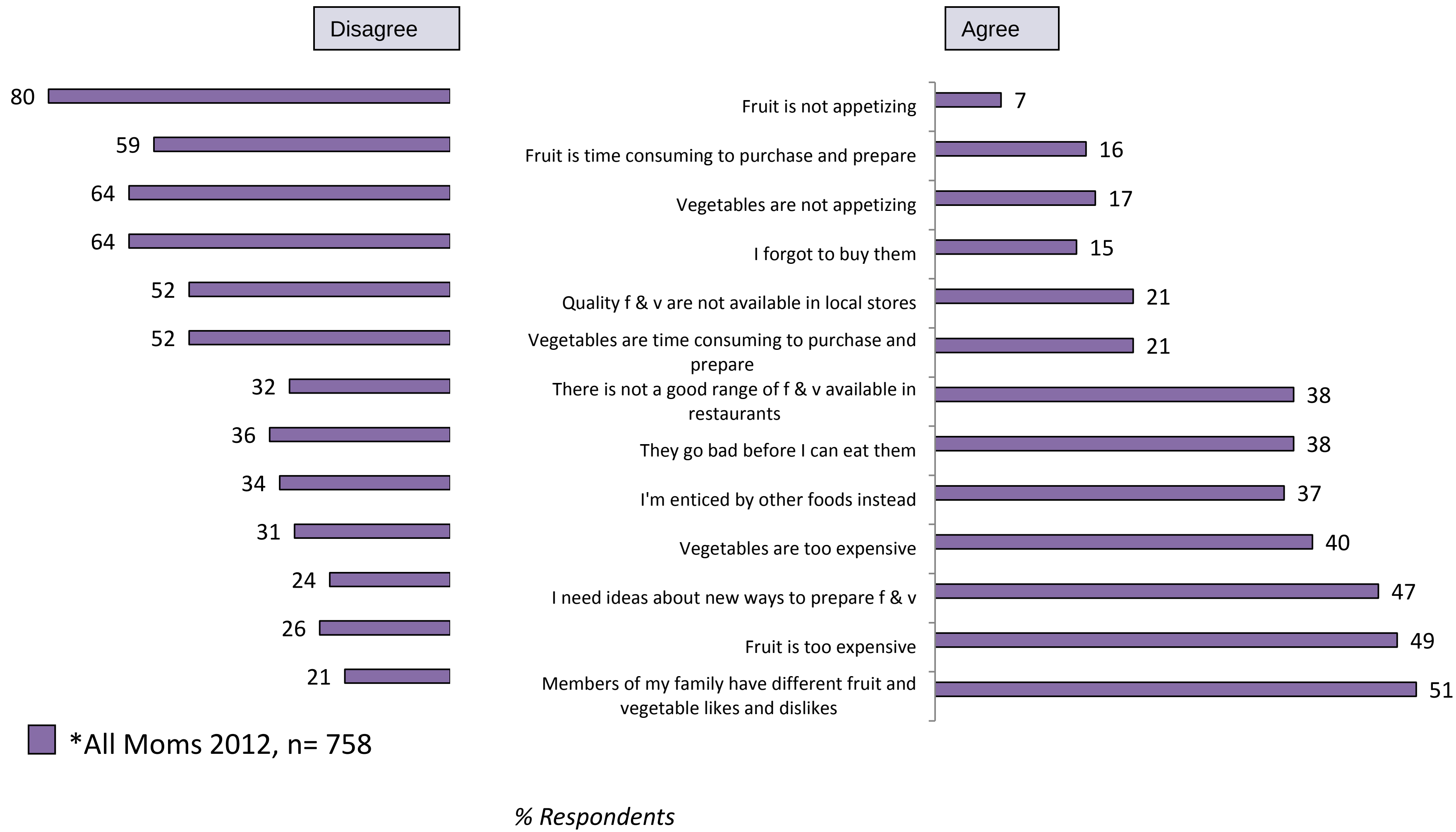
100% Vegetable Juice	Pre-cut or Pre-Washed Vegetables	Freeze-Dried Vegetables	Vegetable Purees
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Older Primary Shoppers are more likely than Younger Primary Shoppers to purchase **about the same** amount of 100% vegetable juice during the past three months compared to one year earlier (Older: 75% / Younger: 61%). ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** 100% vegetable juice during the past three months compared to one year earlier (Younger: 20 %/ Older: 9%).	Male vs. Female Primary Shoppers ➢ Male Primary Shoppers are more likely than Male Primary Shoppers to purchase **about the same** amount of pre-cut or pre-washed vegetables during the past three months compared to one year earlier (Male: 80% / Female: 68%). Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers ➢ Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to purchase **about the same** amount of pre-cut or pre-washed vegetables during the past three months compared to one year earlier (Higher Income: 78% / Lower Income: 67%). ➢ Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to purchase **less** amount of pre-cut or pre-washed vegetables during the past three months compared to one year earlier (Lower Income: 16% / Higher Income: 8%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** freeze-dried vegetables during the past three months compared to one year earlier (Younger: 21% / Older: 8%).	Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers ➢ Younger Primary Shoppers are more likely than Older Primary Shoppers to purchase **more** vegetable purees during the past three months compared to one year earlier (Younger: 18% / Older: 8%).

Q89/Q94/Q99/Q104. Did you buy less, more or about the same amount of <Insert Item> in the past three months compared to one year earlier? (Base: Sample of All respondents who say that <insert item> is available in the home?

Mom Strategies

Similar to Primary Shoppers, Moms say cost and different preferences are the leading causes of difficulty with respect to including fruit and vegetables in meals

Level of agreement in relation to difficulty of including vegetables and fruits in meals and snacks

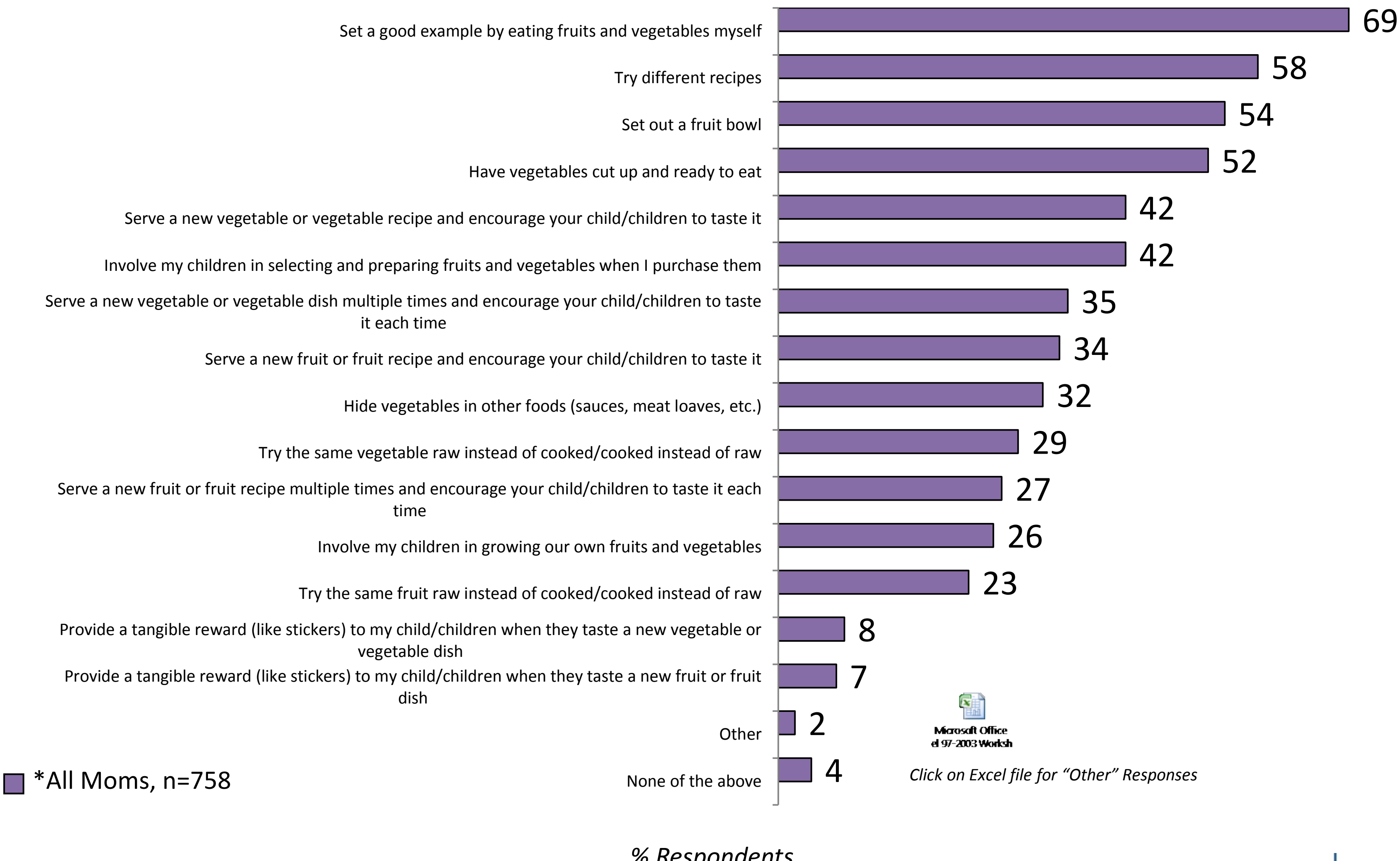


**All Moms: Includes Moms in all categories*

Q119. Please indicate your level of agreement in relation to how difficult each is for you personally to include fruits and vegetables in meals and snacks.

Strategies for encouraging consumption of fruits and vegetables include setting a good example, novelty, and accessibility

*Approaches tried by *Moms to encourage their family to eat more fruits and vegetables*



Microsoft Office el 97-2003 Worksh

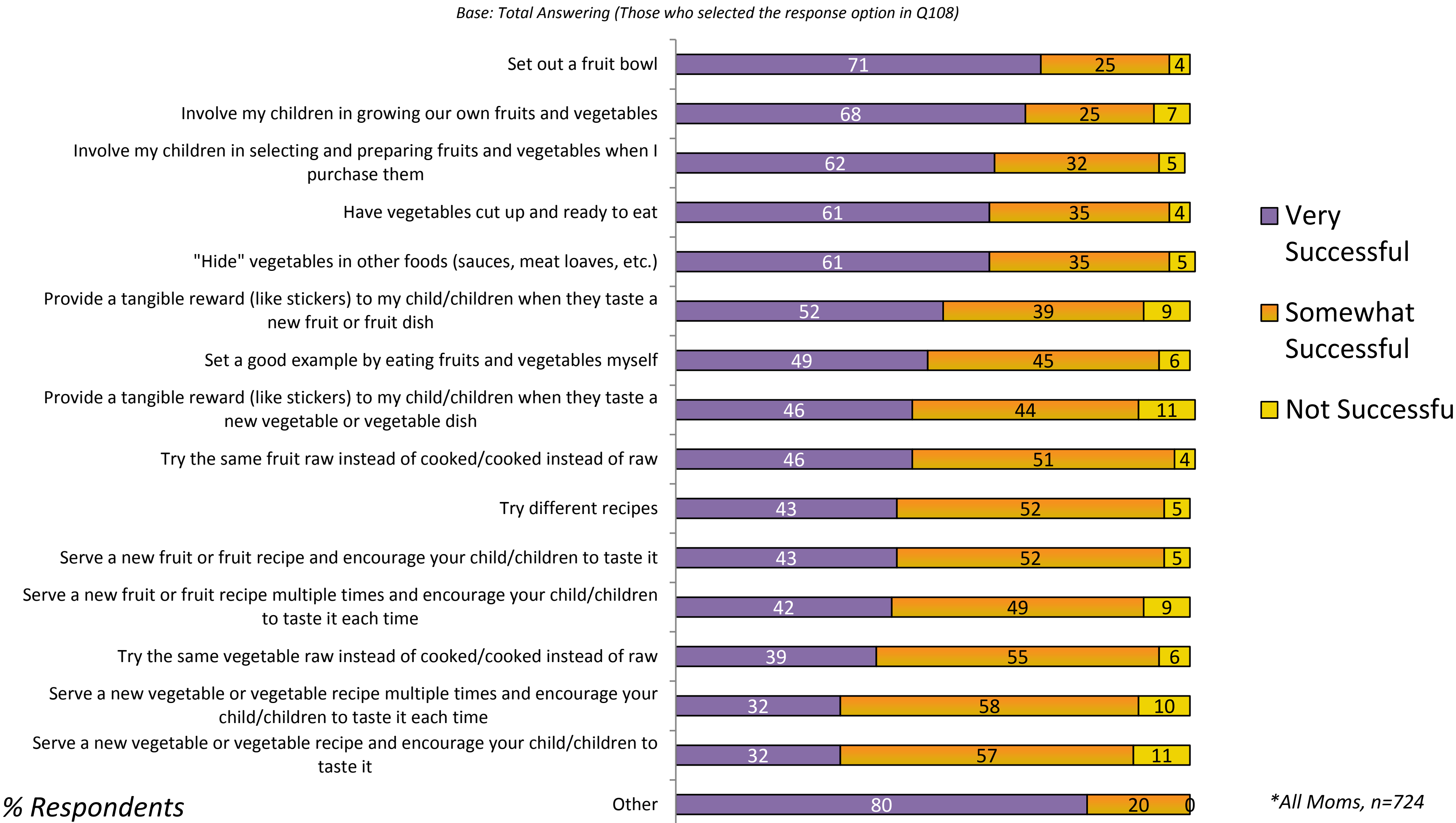
Click on Excel file for "Other" Responses

**All Moms: Includes Moms in all categories*

Q108. Which of the following approaches have you tried to encourage your family to eat more fruits and vegetables? (Select all that apply)

Accessibility and children involvement are considered very successful strategies among Moms

*Success of the approaches that *Moms have tried to encourage their family to eat more fruits and vegetables*



All Moms: Includes Moms in all categories

Q111. For each of the following approaches that you have tried to encourage your family to eat more fruits and vegetables, how successful have they been?

Approaches Mothers Use to Encourage Their Families to Eat More Fruits and Vegetables

The following statistically significant differences for the approaches that mothers use to encourage their families to eat more fruits and vegetables were found amongst the following Female Primary Shoppers groups:

Married vs. Single Female Primary Shoppers

- Married Female Primary Shoppers are more likely than Single Female Primary Shoppers to **involve their children in growing their own fruits and vegetables** to encourage their families to eat more fruits and vegetables (Married: 28% / Single: 16%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Female Primary Shoppers

Younger vs. Older (34 years and Under vs. 35 years and Over) Female Primary Shoppers

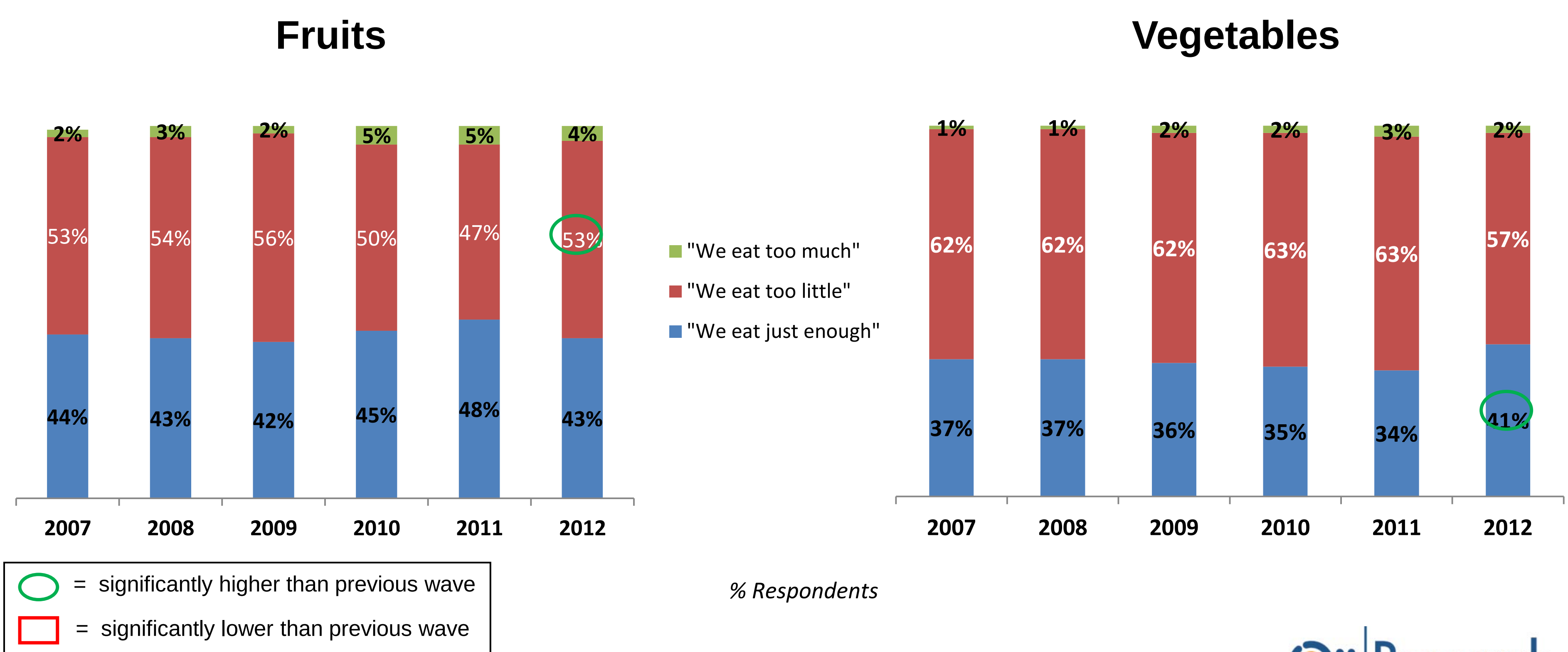
- Older Female Primary Shoppers are more likely than Younger Female Primary Shoppers to **set out a fruit bowl** to encourage their families to eat more fruits and vegetables (Older:58% / Younger: 47%).
- Younger Female Primary Shoppers are more likely than Older Female Primary Shoppers to use the following methods to encourage their families to eat more fruits and vegetables:
  - **Serve a new vegetable or vegetable dish multiple times to encourage their child/children to taste it each time** (Younger: 40% / Older: 32%);
  - **Serve a new fruit or fruit recipe and encourage their child/children to taste it** (Younger: 39% / Older: 31%);
  - **Hide vegetables in other foods (sauces, meat loaves, etc.)** (Younger: 37% / Older: 28%);
  - **Serve a new fruit or fruit recipe multiple times and encourage their child/children to taste it each time** (Younger: 33% / Older: 23%);
  - **Provide a tangible reward (like stickers) to their child/children when they taste a new vegetable or vegetable dish** or **provide a tangible (like stickers) to my child/children when they taste a new fruit or fruit dish** (Younger: 33% / Older: 23%);

Q108: Which of the following approaches have you tried to encourage your family to eat more fruits and vegetables? (Base: All mothers)

Over-Time Comparison of Moms with Children Age 10 and Under

Moms who feel "We eat too little fruit" has grown this wave, whereas those who feel "We eat too little vegetables" has decreased

Perceptions of Moms with kids 10 and under regarding their fruits and vegetables consumption

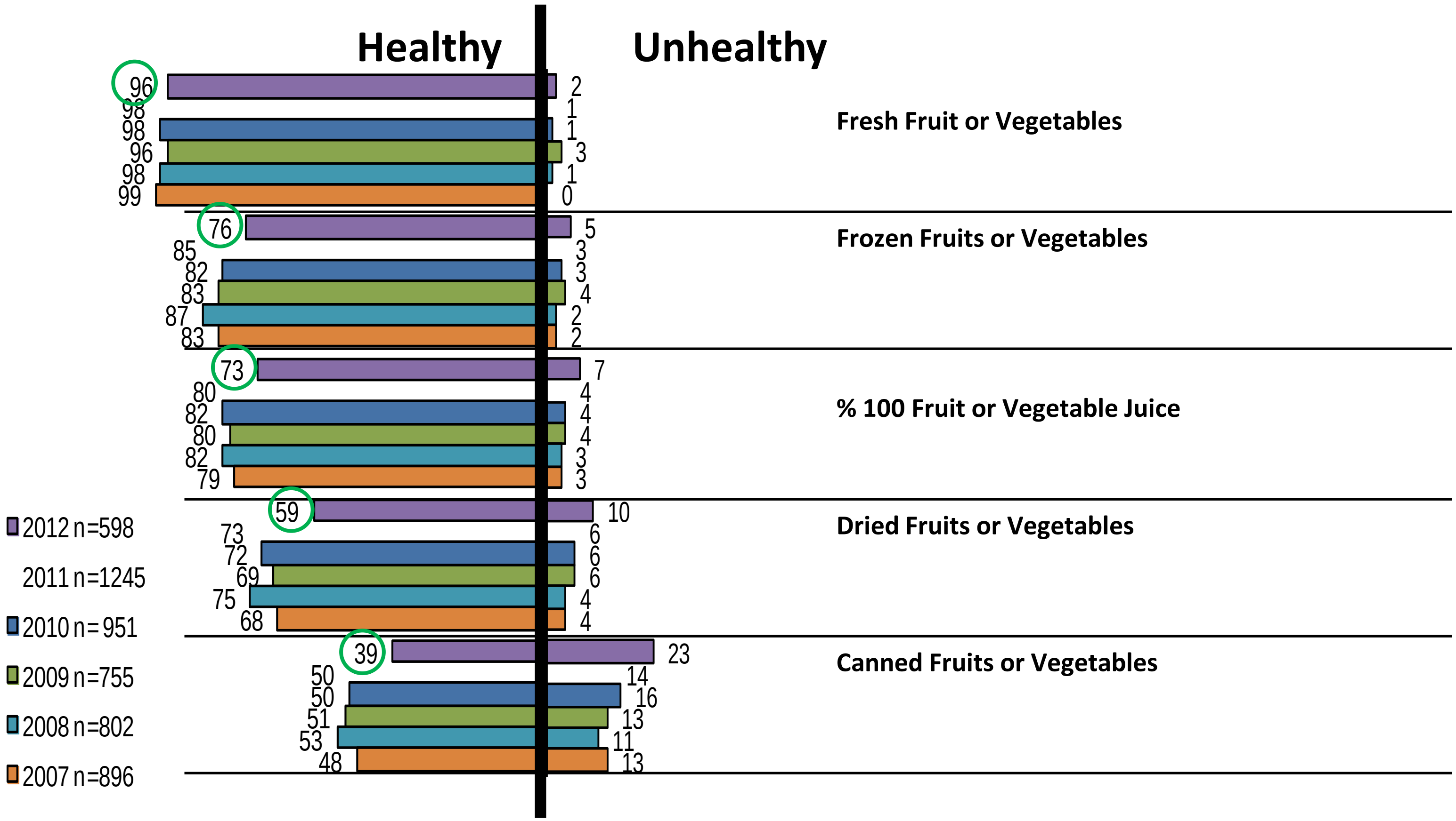


% Respondents

Q14. Which of these statements best represents you or your family's eating habits for each of the following?

As with Primary Shoppers, Moms consider Fresh Fruits and Vegetables the most healthy forms, while canned is the least healthy

In general, how healthy do you consider the following foods to be:*



Net Score** by Moms with kids 10 & under
+94
+71
+66
+49
+16

All Moms with kids 10 & under

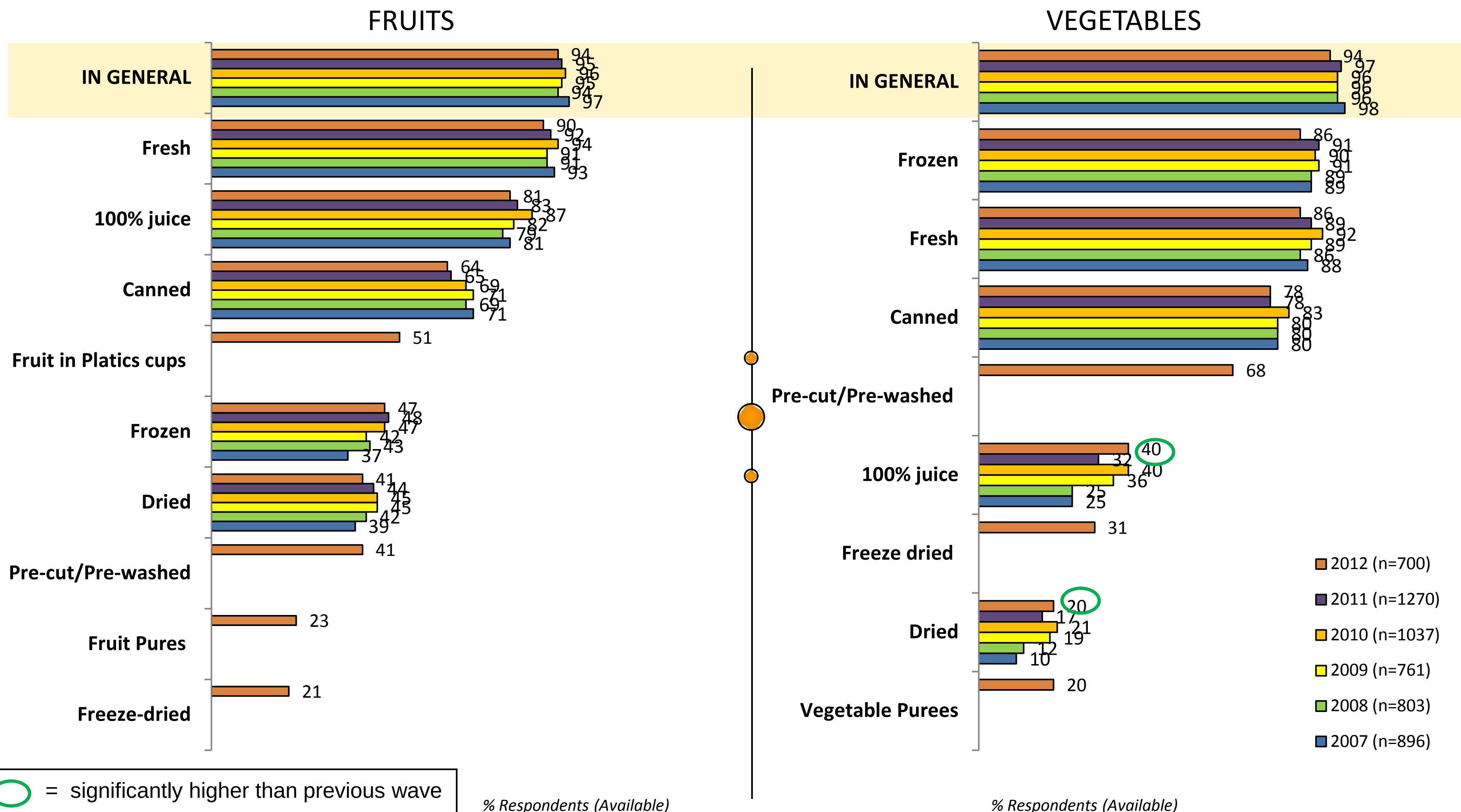
% Respondents
*Please note percentages do not add to 100

***Net score represents % respondents who agree with the given statement less those who disagree*

Q17. In general, how healthy do you consider the following foods to be?

This year, there was an increase in the availability of 100% vegetable juice and dried vegetables at homes of Moms with kids 10 and under

Availability of fruit and vegetables at homes of Moms with kids 10 & under



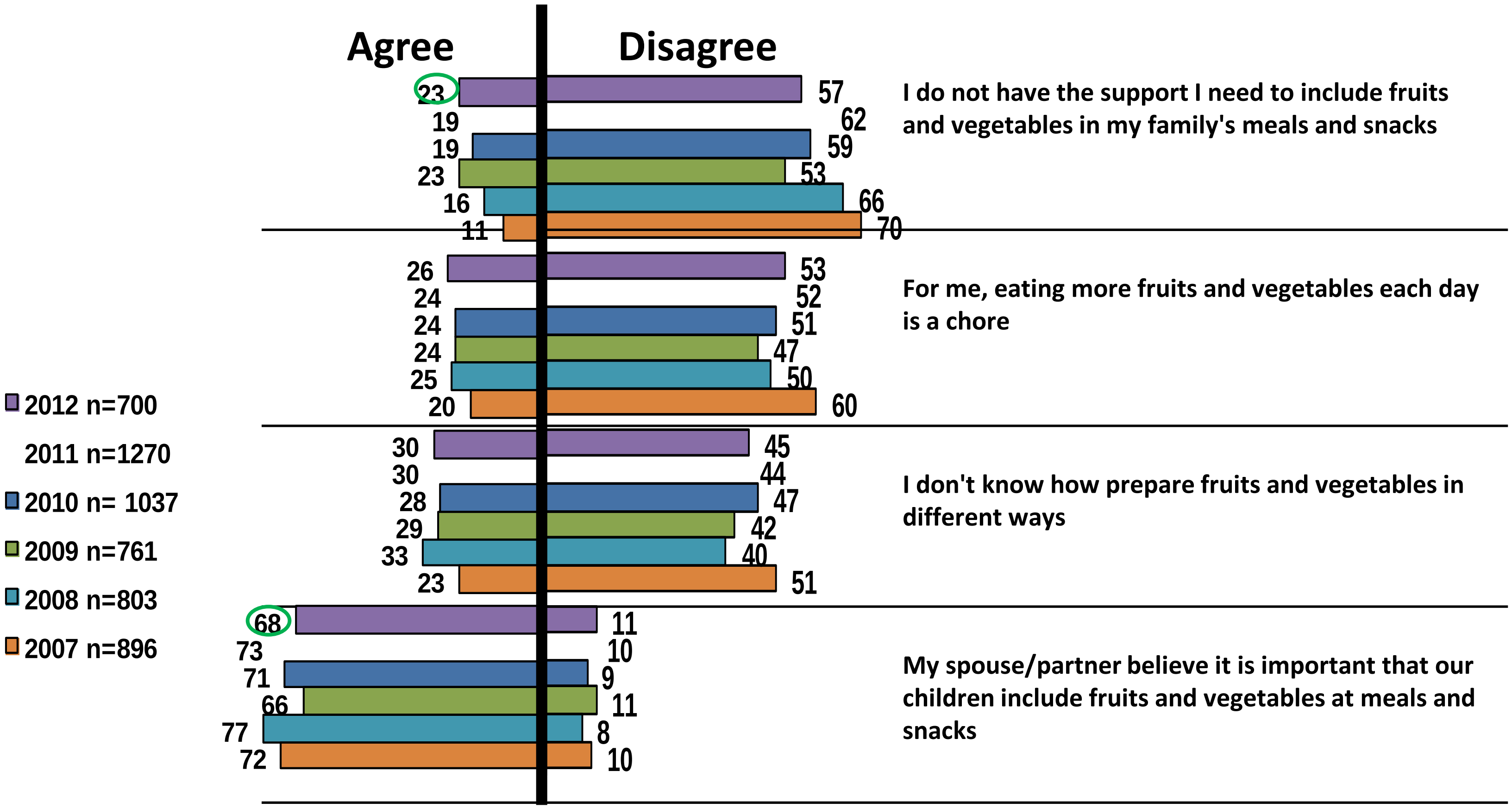
= significantly higher than previous wave

= significantly lower than previous wave

Q18. Please rate the availability of fruit and vegetables in your home.

There appears to be slight erosion in support from spouses with respect to a belief that fruits and vegetables be included in meals and snacks

Please rate your level of agreement or disagreement with the following statements:



Net Score** by Moms with kids 10 & under
-34
-27
-15
+57

= significantly higher than previous wave
= significantly lower than previous wave

% Respondents
*Please note percentages do not add to 100

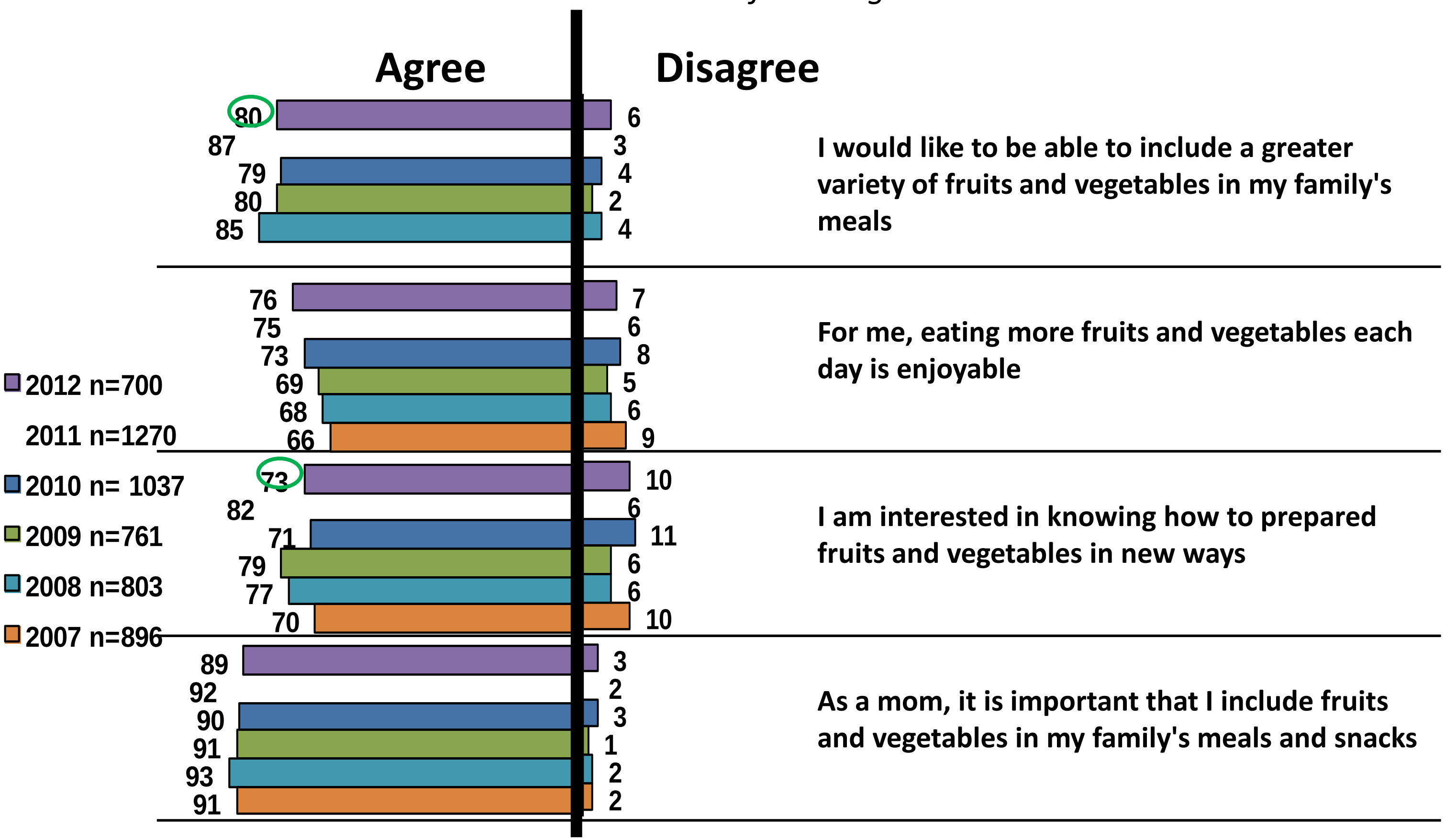
All Moms with kids 10 & under

***Net score represents % respondents who agree with the given statement less those who disagree*

Q113. Please rate your level of agreement or disagreement with the following statements.

Desire for greater variety and interest in new ways of preparing fruits and vegetables are both down this wave

Please rate your level of agreement or disagreement with the following statements:



Net Score** by Moms with kids 10 & under
+74
+69
+63
+86

% Respondents
*Please note percentages do not add to 100

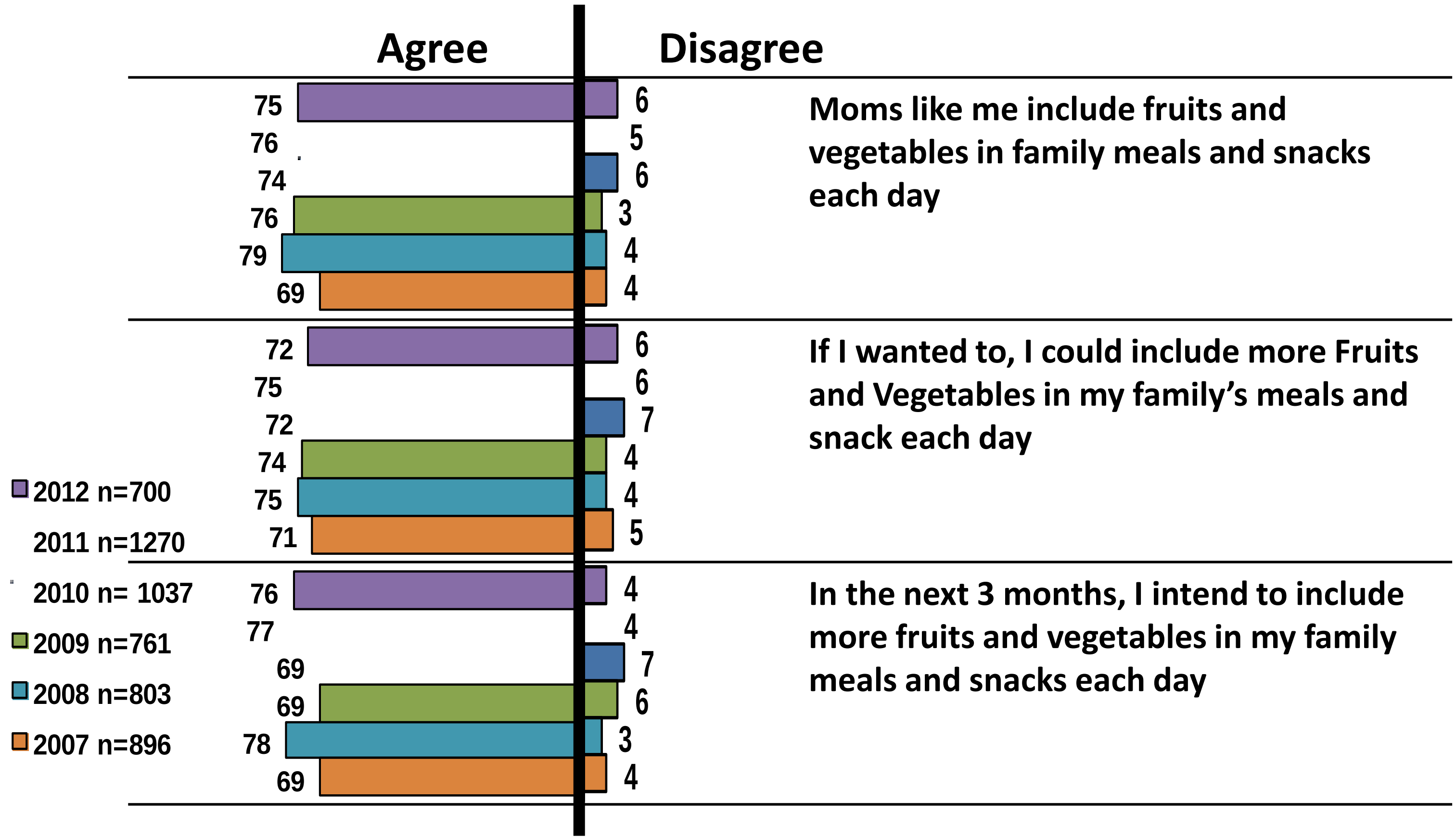
All Moms with kids 10 & under

***Net score represents % respondents who agree with the given statement less those who disagree*

Q113. Please rate your level of agreement or disagreement with the following statements.

The level of agreement with the statements below is stable compared to last wave

Please rate your level of agreement or disagreement with the following statements:



Net Score** by Moms with kids 10 & under
+69
+66
+72

% Respondents
*Please note percentages do not add to 100

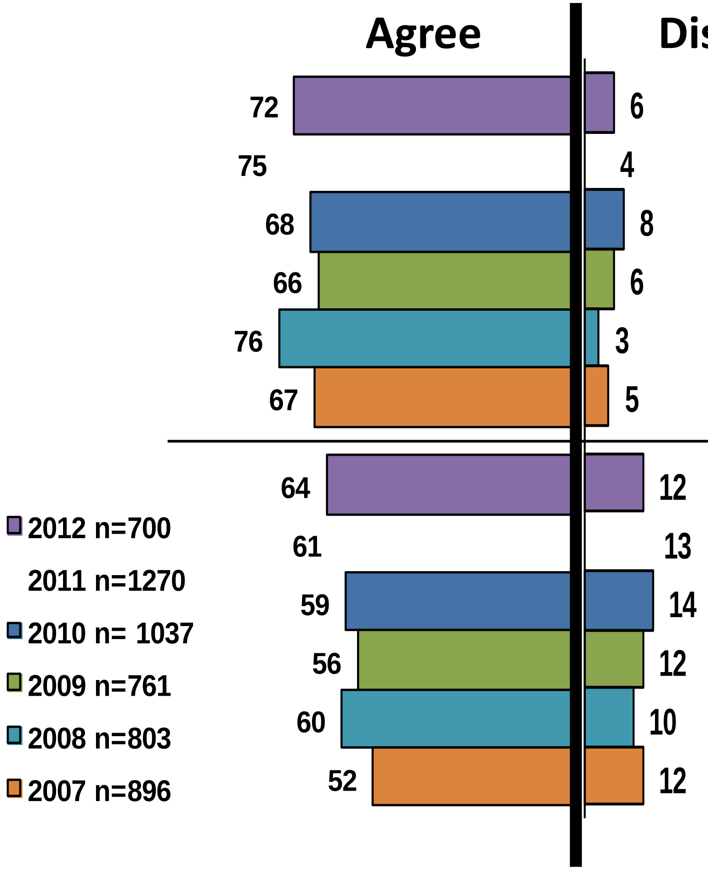
All Moms with kids 10 & under

***Net score represents % respondents who agree with the given statement less those who disagree*

Q112. Please rate your level of agreement or disagreement with the following statements.

Likelihood to include more fruits and vegetables in meals and snacks remains high

Please rate your level of agreement or disagreement with the following statements:



	Net Score** by Moms with kids 10 & under
In the next 3 months, it is likely that I will include more fruits and vegetables in my family's meals and snacks	+66
It is easy for me to include more fruits and vegetables in my family's meals and snack's each day	+52

% Respondents
*Please note percentages do not add to 100

All Moms with kids 10 & under

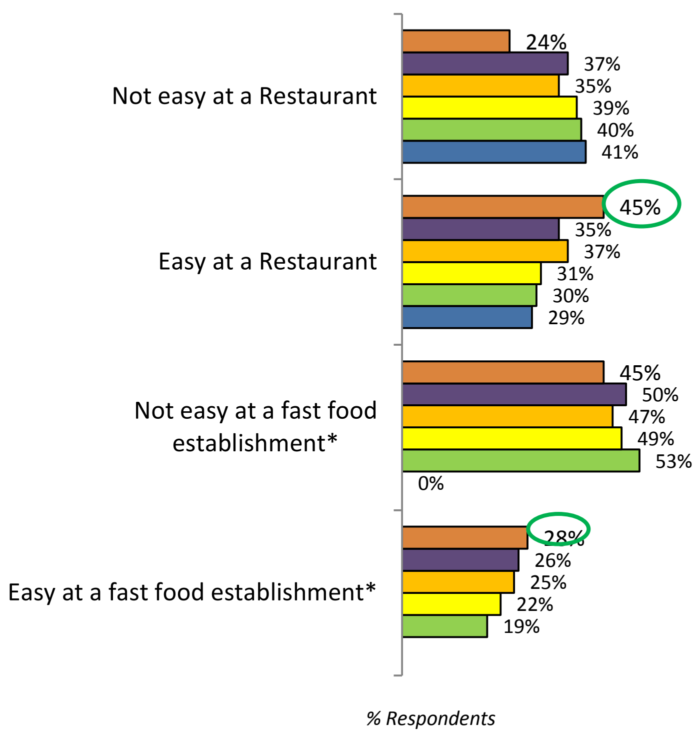
***Net score represents % respondents who agree with the given statement less those who disagree*

Q112. Please rate your level of agreement or disagreement with the following statements.

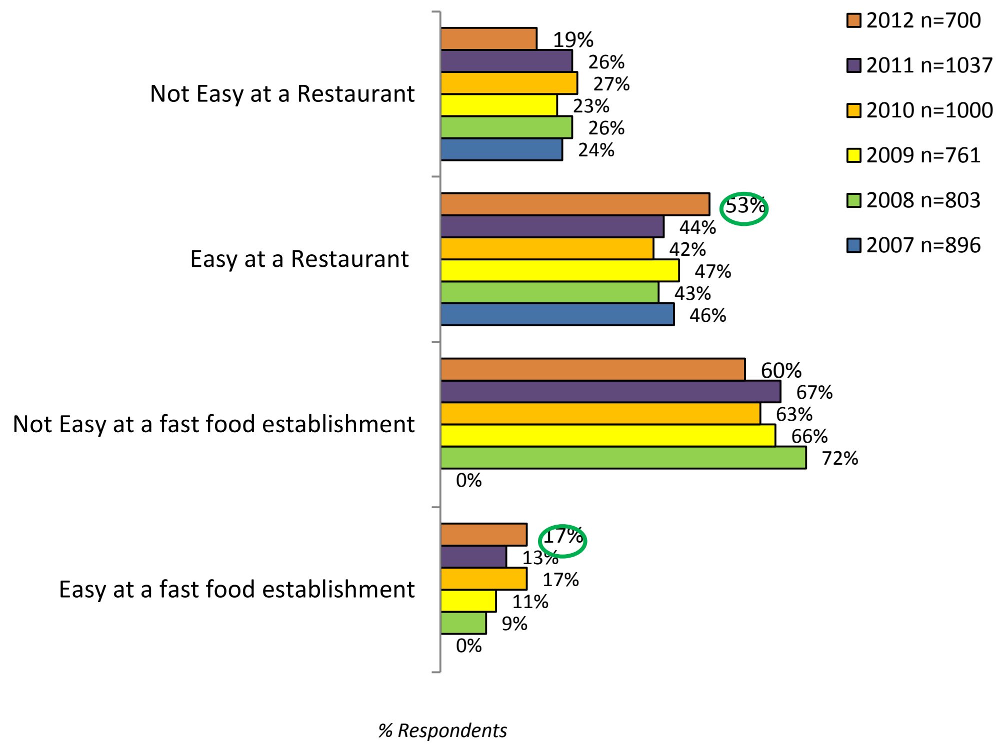
There has been an increase in Moms who believe it is easy to get their families to eat fruits and vegetables when dining out

How easy is it for you to get your family to eat fruit and vegetables at the following times

FRUIT



VEGETABLES



= significantly higher than previous wave

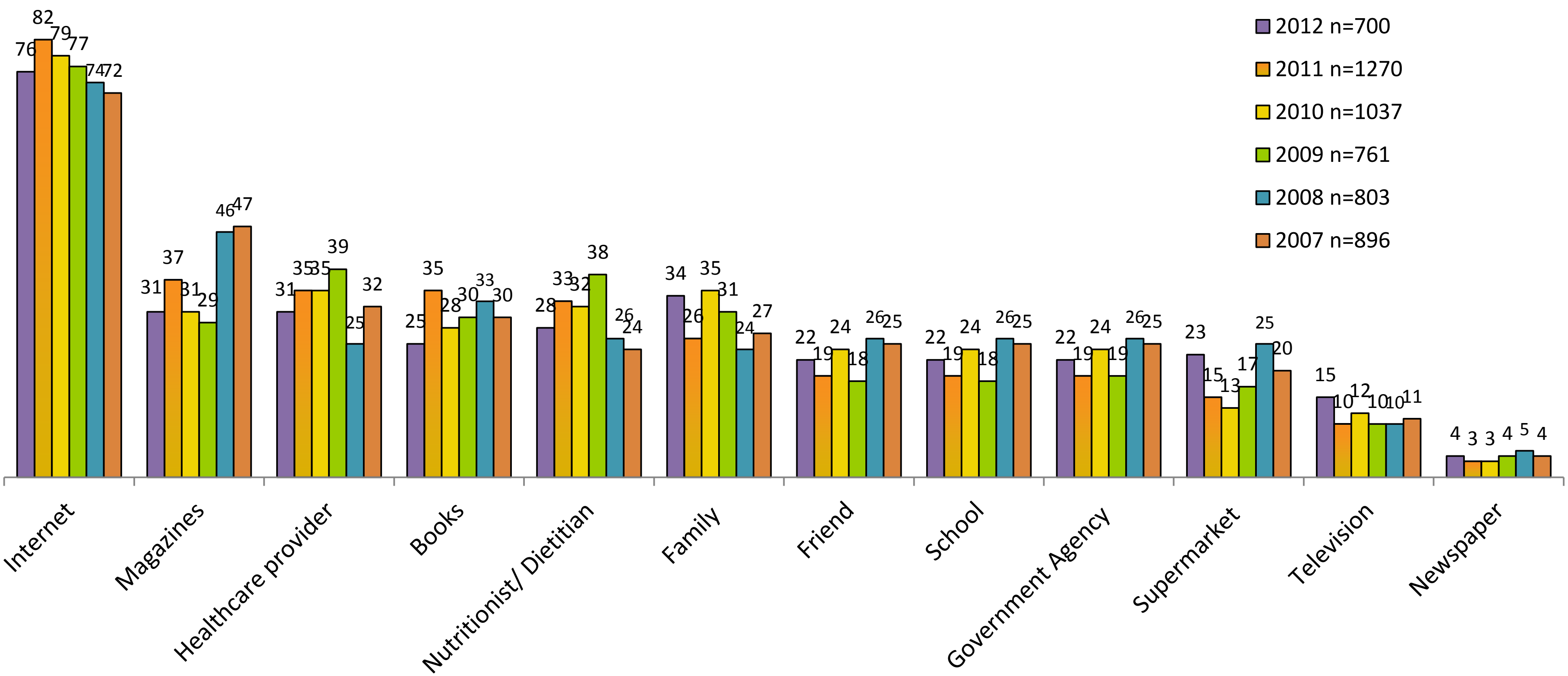
= significantly lower than previous wave

*Not included as an option in 2007

Q120. How easy is it for you to get your family to eat VEGETABLES at the following times?
Q121. Please rate how easy it is to get your family to eat FRUIT at the following times?

This year, more Moms say they would consult their families or go to a supermarket for information on how to encourage consumption

If you wanted information about how to get your family to eat more fruits and vegetables, where would you go to obtain it?



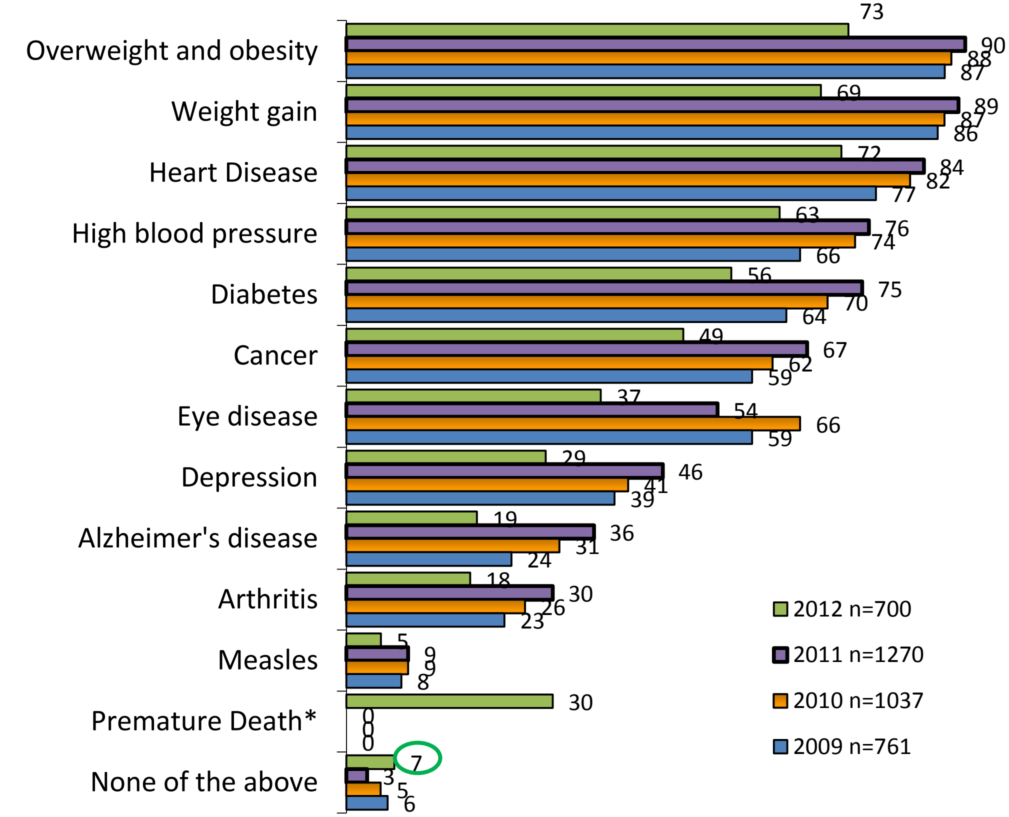
% Respondents

Moms with kids 10 and under

Q122. If you wanted information about how to get your family to eat more fruits and vegetables, where would you go to obtain it? (Please rank your top 3 choices) For Example: 1 = First choice, 2 = Second choice, 3 = Third choice

The addition of the option "Premature Death" for this year's study has impacted virtually all other categories

Which of the following may fruits and vegetables be beneficial for preventing?



All Moms with kids 10 & under

% Respondents

= significantly higher than previous wave

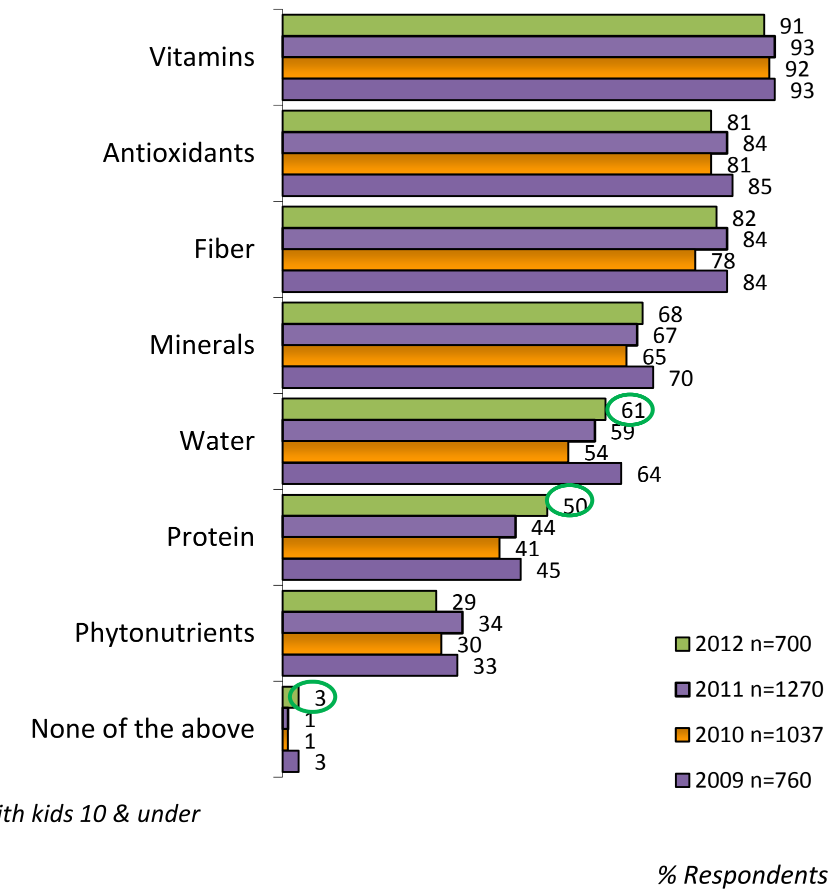
= significantly lower than previous wave

Note: in 2010, "eye disease" was used to replace "eye health" in previous studies.
**Premature Death was not offered in previous years*

Q117: Which of the following do you believe consuming fruits and vegetables may be beneficial for preventing? (Please select all that apply)

Vitamins, antioxidants, and fiber remain the three most cited health benefits provided by fruits and vegetables

Which components may provide health benefits?



All Moms with kids 10 & under

= significantly higher than previous wave

= significantly lower than previous wave

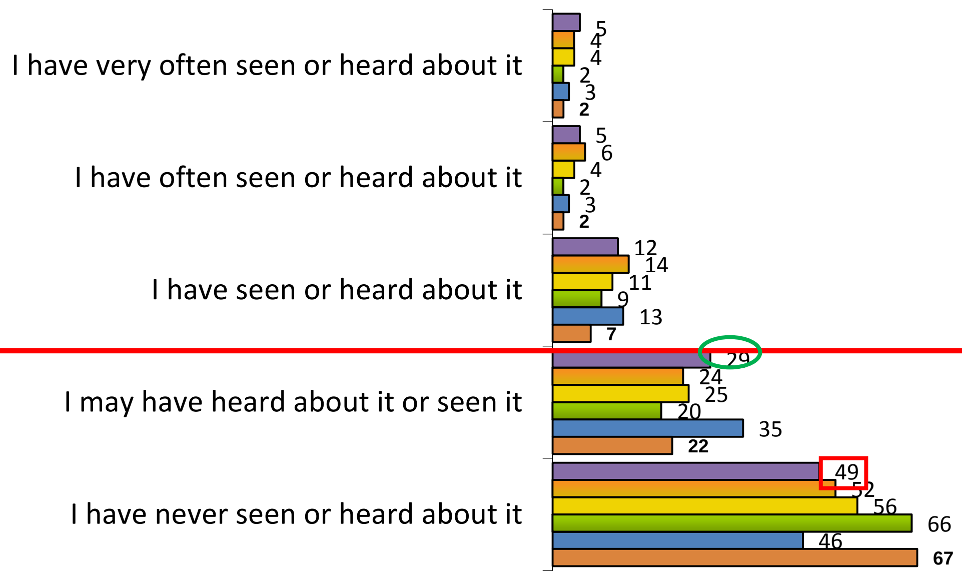
Q118: Which of the following components of fruits and vegetables do you believe may provide health benefits? (Please select all that apply)

Campaign Awareness & Impressions

There has been a slight drop (-2%) in those who definitively say that they are aware of Fruits & Veggies - More Matters

How familiar are you with Fruits & Veggies-More Matters™?

Moms with kids 10 & under



Total "definite" awareness:

22% (2012) -2%
24% (2011) +8%
19% (2010) +6%
13% (2009) -6%
19% (2008) +8%

2012 n = 700
2011 n = 1270
2010 n = 1037
2009 n = 761
2008 n = 803
2007 n = 896

= significantly higher than previous wave
= significantly lower than previous wave

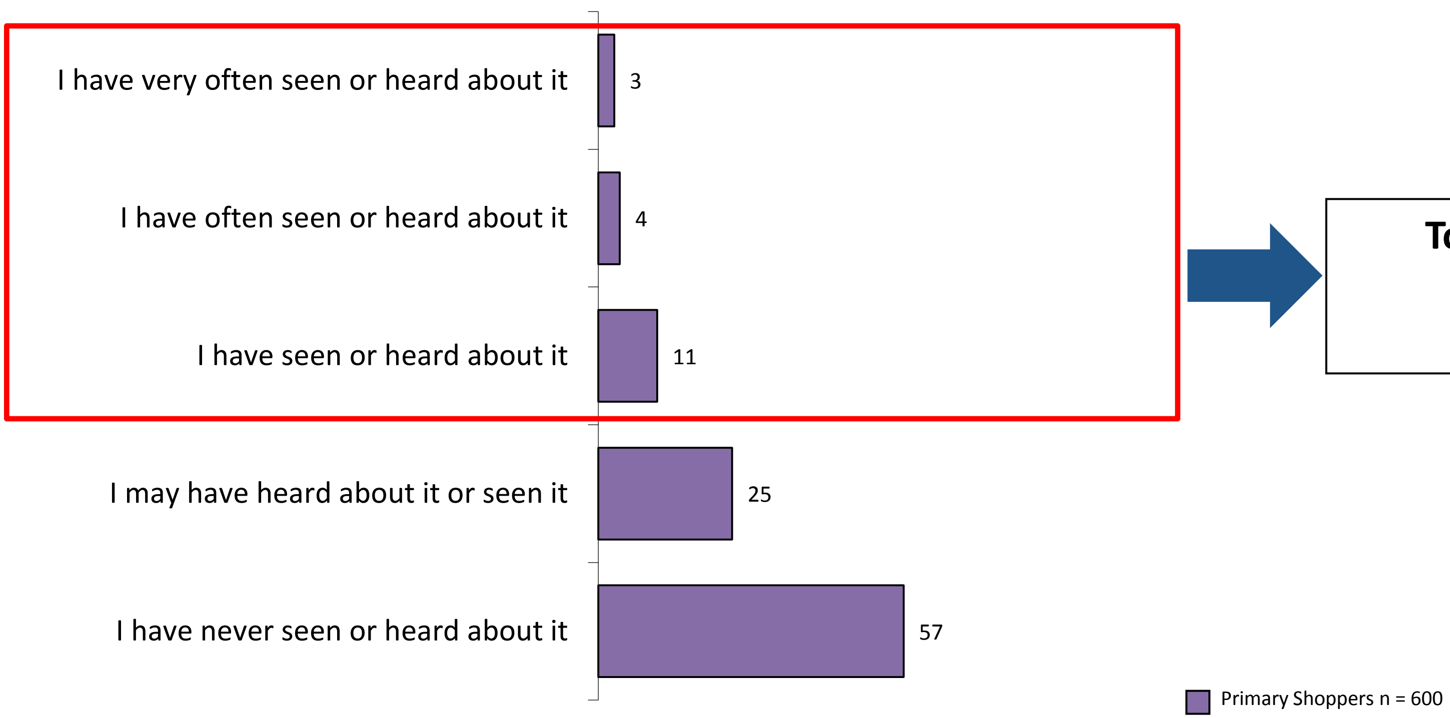
% Respondents

Q124. Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?

Just under one-in-five Primary Shoppers are aware of Fruits & Veggies - More Matters

How familiar are you with Fruits & Veggies-More Matters™?

Primary Shoppers



Total "definite" awareness:
18% (2012)

% Respondents

Q124. Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?

Familiarity with Fruits & Veggies – More Matters

The following statistically significant differences for what is most useful to help them attain the recommended amount of fruits and vegetables were found amongst the following Primary Shoppers groups:

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to say that:
  - **I may have heard about it or seen it** (Younger: 30% / Older: 24%);
  - **I have very often seen or heard about it** (Younger: 7% / Older: 3%).
- Older Primary Shoppers are more likely than Younger Primary Shoppers to say that they **have never seen or heard about it** (Older: 56% / Younger: 47%).

Q124: Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?

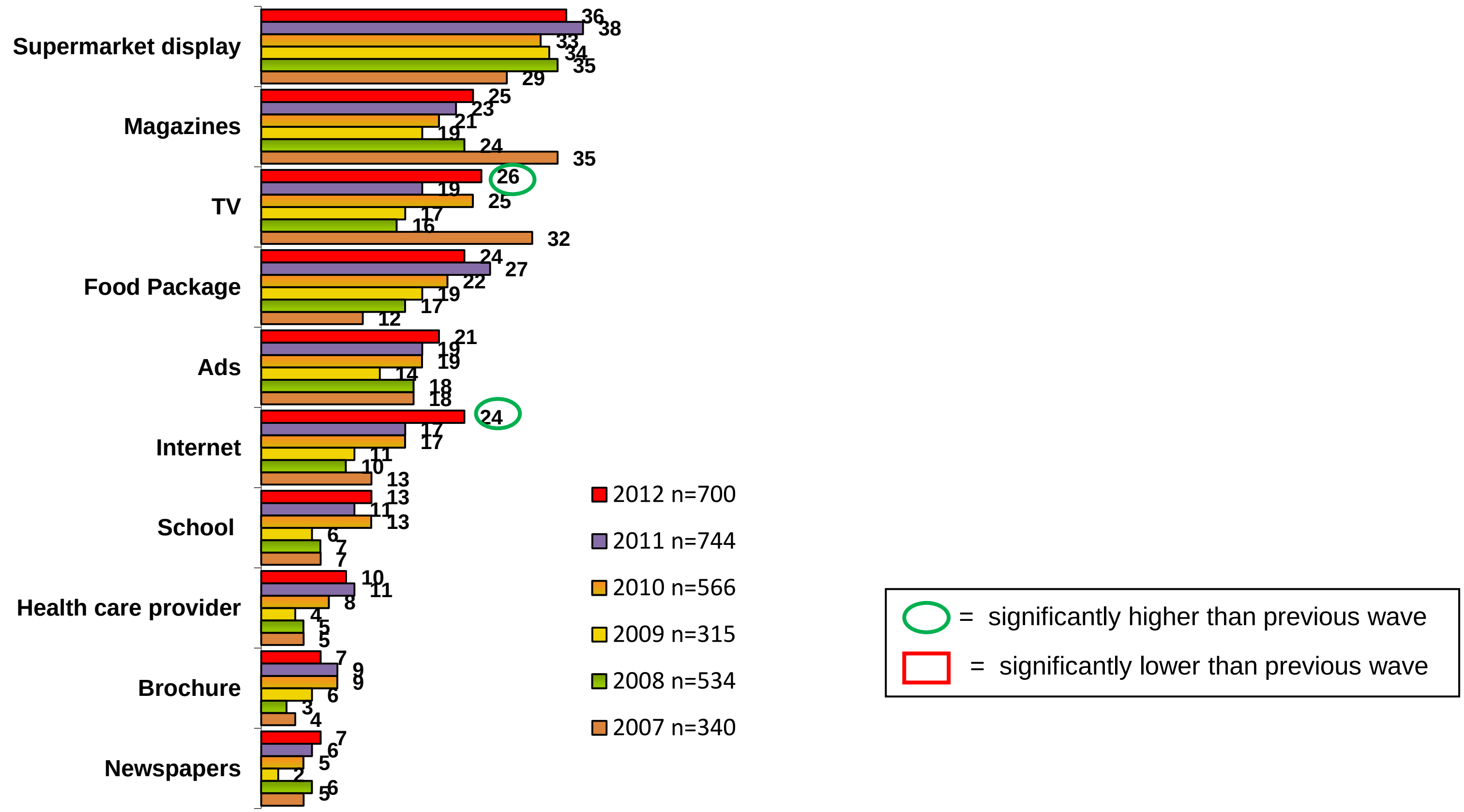
This past year, more Moms became aware of Fruits and Veggies More Matters by way of TV and the Internet

How did you become familiar with the logo?

(those who have definitely seen or heard about the logo only)

Moms with kids 10 & under

Primary Channels



% Respondents

Q125: Where did you see or hear of Fruits & Veggies—More Matters™? (Please select all that apply)

How did you hear about Fruits & Veggies – More Matters

The following statistically significant differences for what is most useful to help them attain the recommended amount of fruits and vegetables were found amongst the following Primary Shoppers groups:

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to hear about Fruits & Veggies More Matters:
  - **At university** **or** **at church** (Single: 7% / Married: 2%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to hear about Fruits & Veggies More Matter:
  - **On TV** (Lower Income: 36% / Higher Income: 23%);
  - **From their health care provider** (Lower Income: 17% / Higher Income: 7%)..

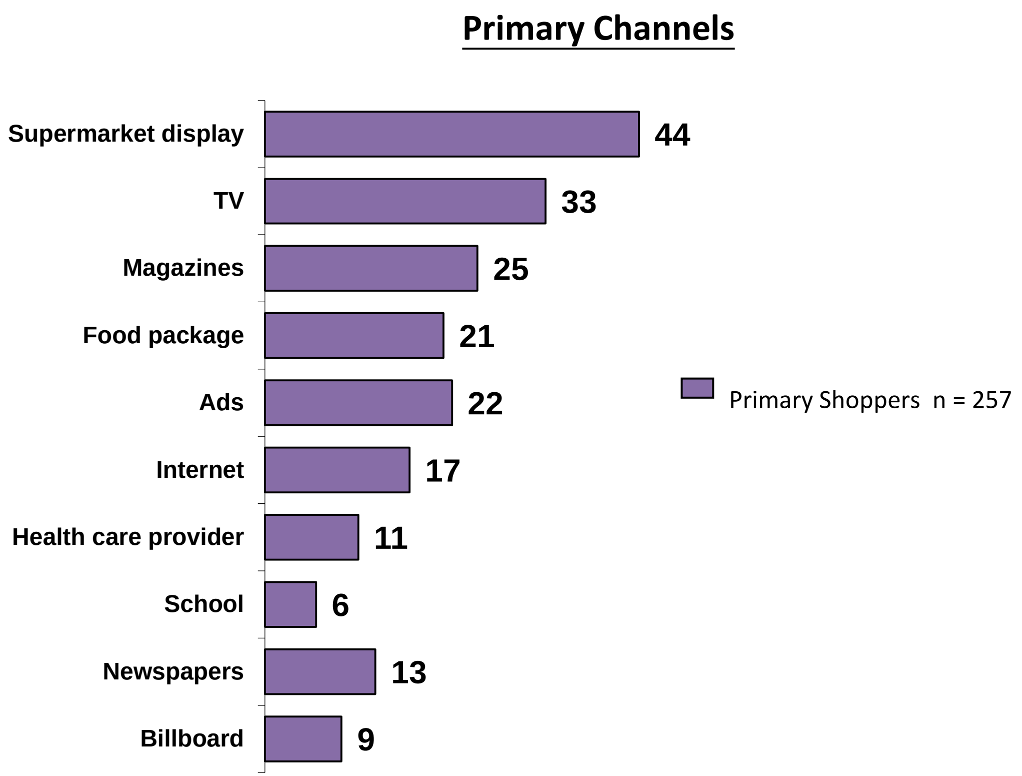
Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to hear about Fruits & Veggies More Matter:
  - **From the internet** (Younger: 29% / Older: 17%);
  - **From their health care provider** (Younger: 18% / Older: 9%);
  - **From the government** (Younger: 11% / Older: 5%);
  - **At university** (Younger: 6% / Older: 1%);
  - **At church** (Younger: 4% / Older: 1%)
- Older Primary Shoppers are more likely than Younger Primary Shoppers to hear about Fruits & Veggies More Matter:
  - **From a supermarket display** (Older: 46% / Younger: 32%);
  - **From magazines** (Older: 28% / Younger: 21%);

Q125: Where did you see or hear of Fruits & Veggies – More Matters?

Most Primary Shoppers became aware of Fruits & Veggies – More Matters through a Supermarket display

How did you become familiar with the logo?
(those who have definitely seen or heard about the logo only)



% Respondents

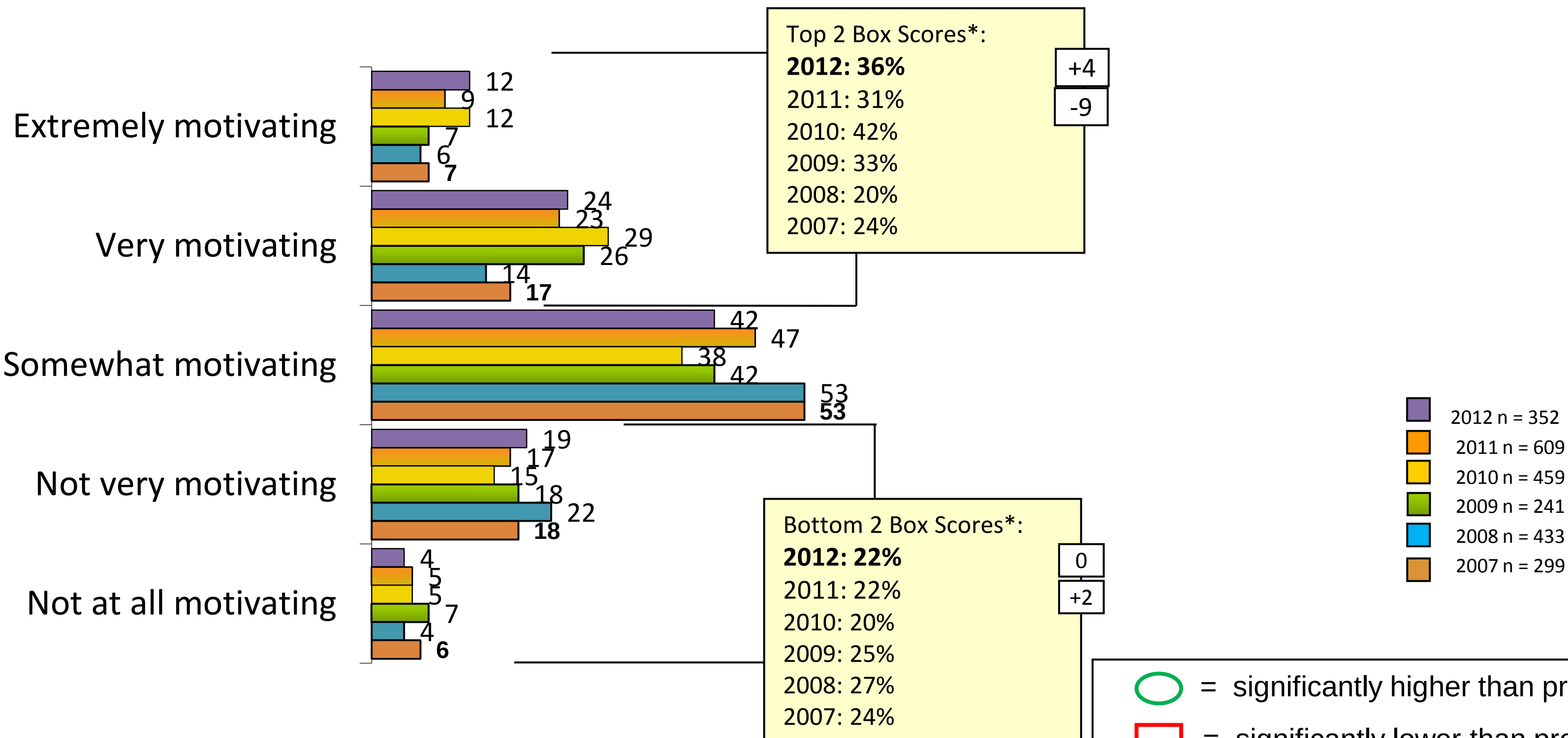
Q66: Where did you see or hear of Fruits & Veggies—More Matters™? (Please select all that apply)

The percentage of Moms who find Fruits and Veggies – More Matters 'very' or 'extremely' motivating has increased this wave

How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?

(Only asked to those who were familiar with the logo)

Moms with kids 10 and under



= significantly higher than previous wave

= significantly lower than previous wave

% Respondents

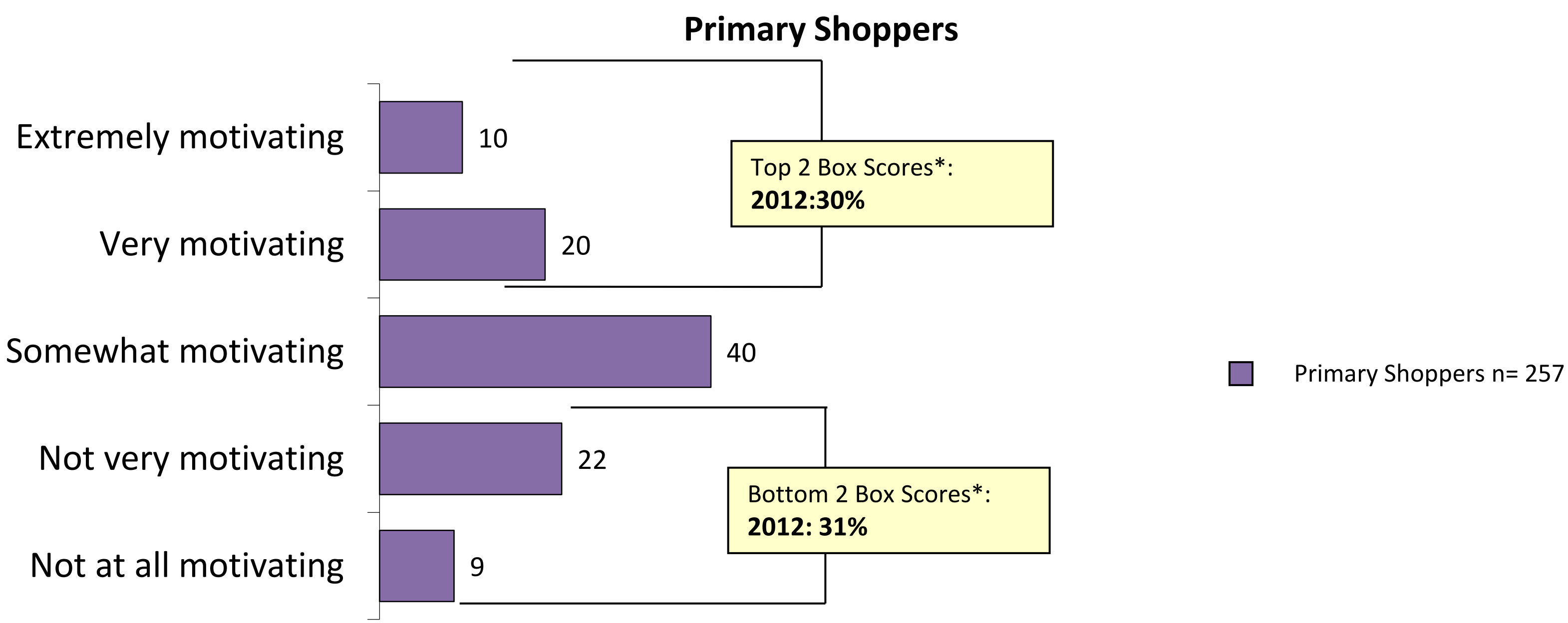
**Top 2 box score reflects the total score of respondents who answered 1or 2*

Q126. How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?

30% of Primary Shoppers find Fruits and Veggies - More Matters 'very' or 'extremely' motivating.

How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?

(Only asked to those who were familiar with the logo)



% Respondents

**Top 2 box score reflects the total score of respondents who answered 1or 2*

Q126. How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?

How Motivating is Fruits & Veggies – More Matters

There are no statistically significant differences amongst the Primary Shoppers groups with respect to how motivating Fruits and Vegetables – More Matters is in helping families eat more fruits and vegetables.

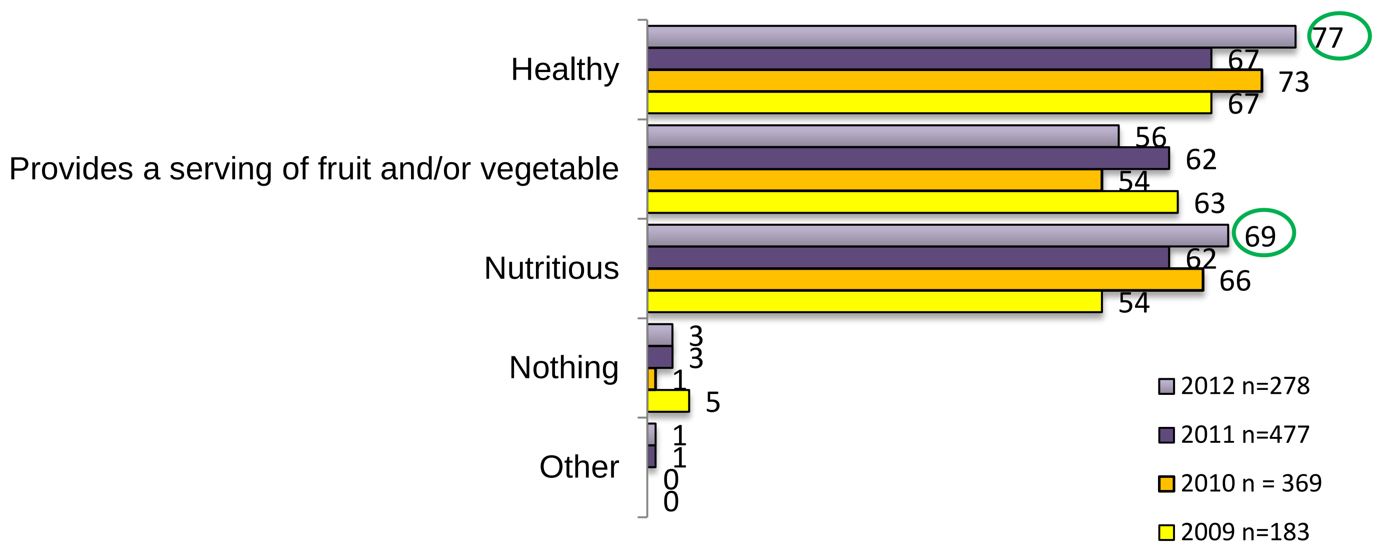
Q126. How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?

More Moms associate the More Matters logo with Healthiness and Nutrition than at any time in the past

Logo Brand Association

(Only asked to those extremely/very/somewhat motivated by logo)

Moms with kids 10 & under



= significantly higher than previous wave

= significantly lower than previous wave

% Respondents

*Q127. If you see the More Matters™ **logo** on a product, what does it say to you about the product?*

Associations with the More Matters logo

The following statistically significant differences if you see the “More Matters” logo on a product were found amongst the following Primary Shoppers groups:

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers to say that the product **provides a serving of fruit and/or vegetables** (Higher Income: 59% / Lower Income: 50%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

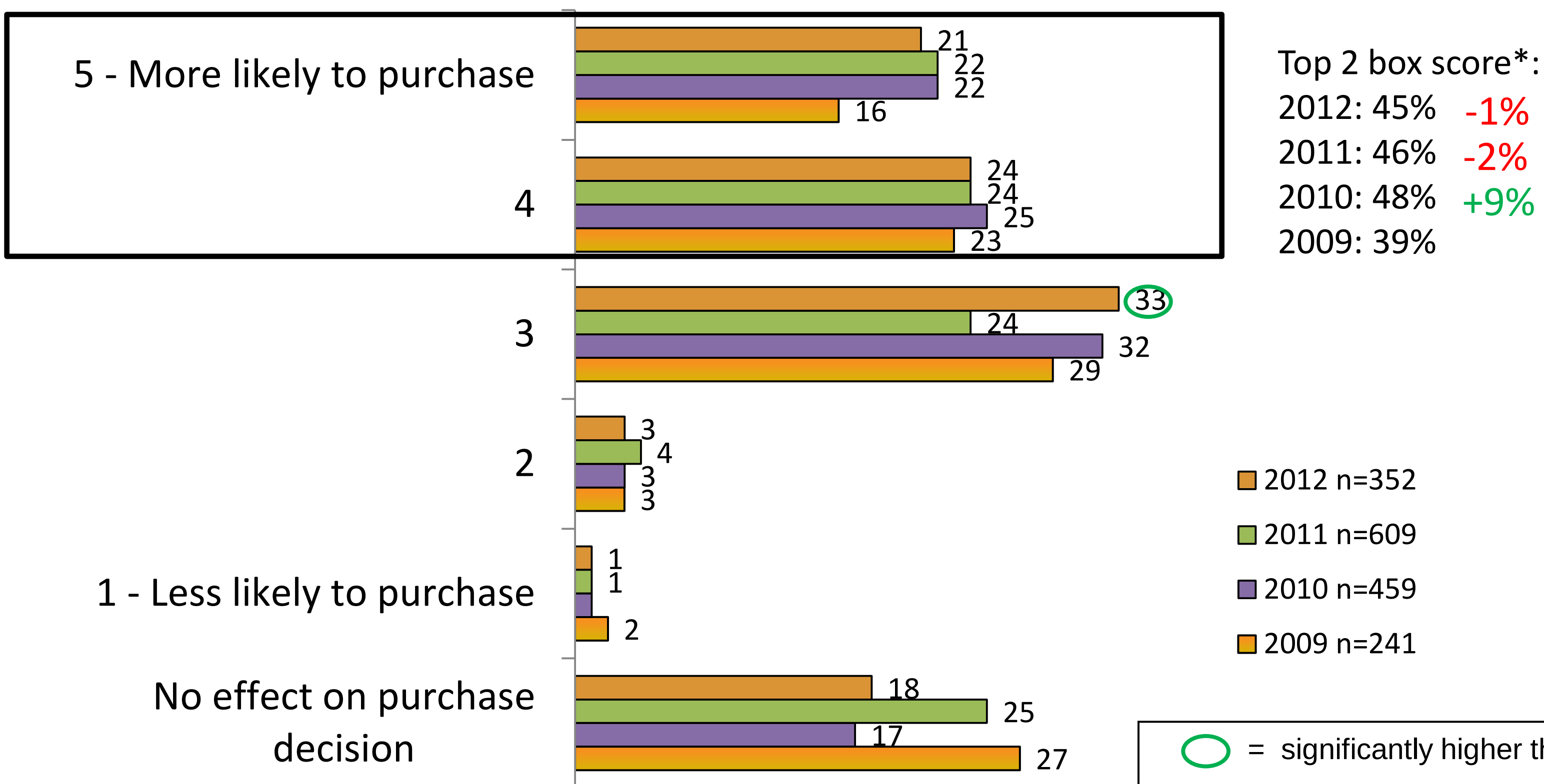
- Younger Primary Shoppers are more likely than Older Primary Shoppers to say that the product is **nutritious** (Younger: 70% / Older: 59%).

Q127: If you see the “More Matters” logo on a product, what does it say to you about the product.

The increase in motivation and logo association have not translated into an increased likelihood of purchasing products with More Matters logo

Logo Purchase Influence

Moms with kids 10 & under *(Only asked to those who were familiar with the logo)*



= significantly higher than previous wave

= significantly lower than previous wave

% Respondents

**Top 2 box score reflects the total score of respondents who answered 4 or 5*

Q128 . How does seeing the "Fruits & Veggies - More Matters" <u>logo</u> affect your decision to purchase the product?

Likelihood to Purchase a Product with the More Matters logo

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the likelihood of purchasing a product with the More Matters logo:

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

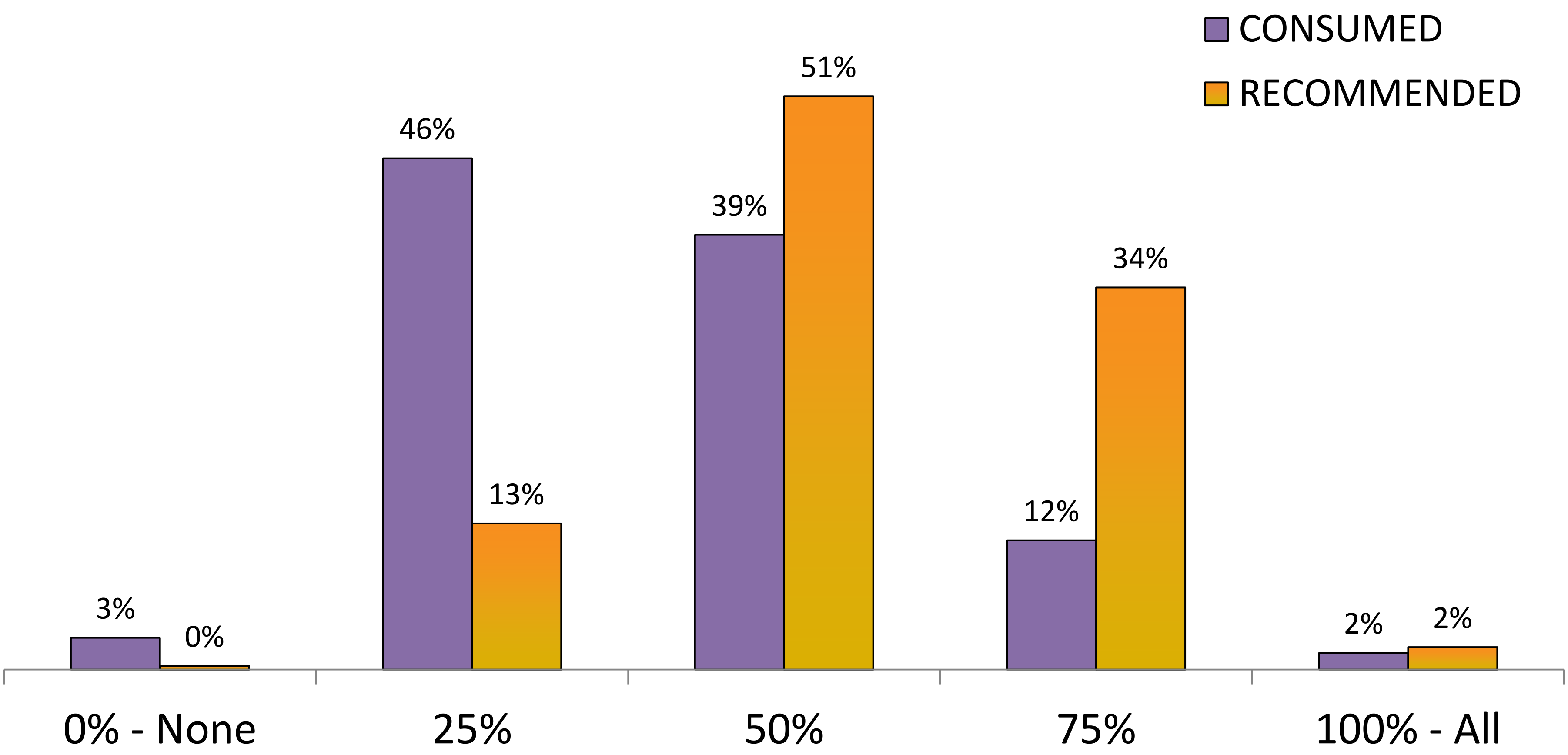
- Younger Primary Shoppers are more likely than Older Primary Shoppers to rate a product **4 out of 5** on the likelihood of purchasing a product with the More Matters logo. (Younger: 28%/Older: 21%)
- Older Primary Shoppers are more likely than Younger Primary Shoppers to rate a product **5 out of 5 (More likely to purchase** (Older: 23% / Younger: 15%).

Q128. How does seeing the “More Matters” logo affect your decision to purchase the product?

MyPlate

The vast majority of Primary Shoppers believe that 50%-75% of their plate should be fruits and vegetables – actual consumption is considerably lower

Portion of plate made of vegetables and fruits.



Primary Shoppers n=600

Q12. Thinking about all the food you consume in a typical day, what portion of your 'plate' (total food consumed) would be made up of fruits and vegetables (versus all other foods)?/ Q13. What portion of your 'plate' (total food consumed) is RECOMMENDED to be made up of fruits and vegetables?

Portion of Your "Plate" Comprised of Fruits and Vegetables

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to the portion of the "plate" to comprise of fruits and vegetables:

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to say that **25%** of their actual "plate" is comprised of fruits and vegetables (Male: 50% / Female: 41%).
- Female Primary Shoppers are more likely than Male Primary shoppers to say that **75%** of their actual "plate" is comprised of fruits and vegetables (Female: 14% / Male: 9%).

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to consider **0% (None)** of their "plate" to comprise of fruits and vegetables (Single: 5% / Married: 2%).

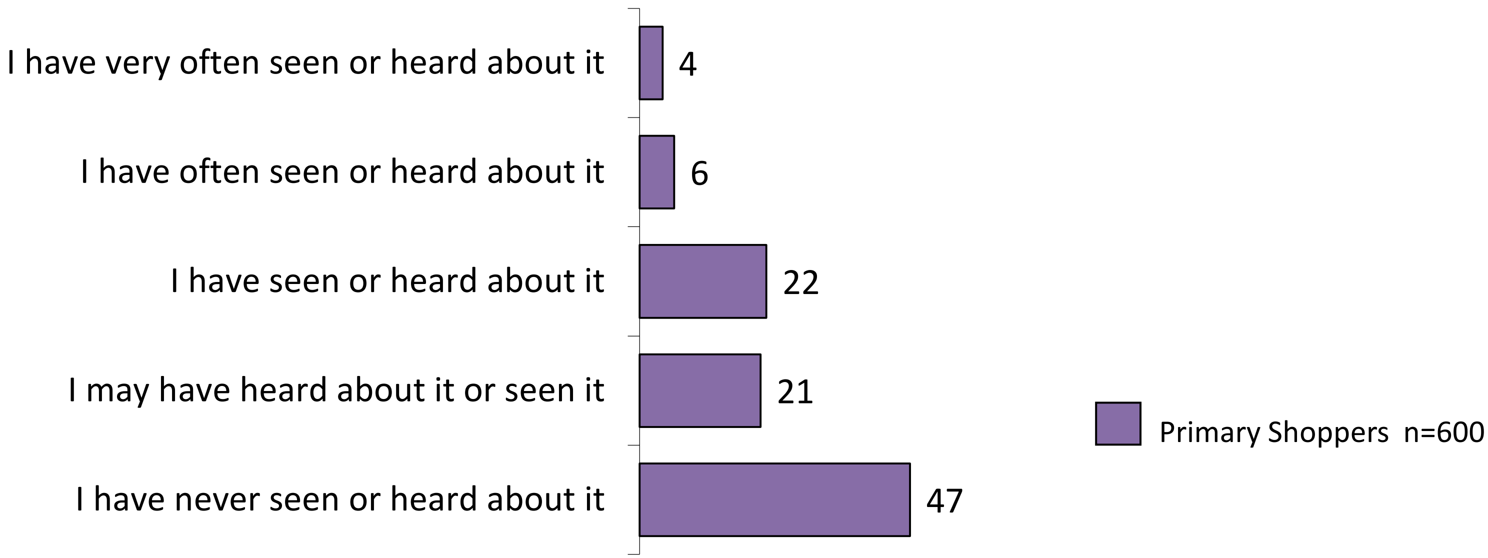
Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Higher Income Primary Shoppers are more likely than Lower Income Primary Shoppers consider **50%** of their "plate" to comprise of fruits and vegetables (Higher: 46% / Lower: 38%).
- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to consider **0% (None)** of their "plate" to comprise of fruits and vegetables (Lower: 3% / Higher: 1%).

Q12. Thinking about all the food you consume in a typical day, what portion of your 'plate' (total food consumed) would be made up of fruits and vegetables (versus all other foods)?
Q13. What portion of your 'plate' (total food consumed) is RECOMMENDED to be made up of fruits and vegetables?

About one-third of Primary Shoppers have definitely seen or heard of 'My Plate', and an additional 21% say they may have

Familiarity with 'My Plate'



% Respondents

Q 132. Which of the following statements best describes your level of familiarity with 'MyPlate'?

Familiarity with MyPlate

The following statistically significant differences for the familiarity with MyPlate were found amongst the following Primary Shoppers groups:

Male vs. Female Primary Shoppers

- Male Primary Shoppers are more likely than Female Primary Shoppers to describe their level of familiarity with MyPlate as **I have never seen or heard about it** (Male: 52% / Female: 43%).
- Female Primary Shoppers are more likely than Male Primary Shoppers to describe their level of familiarity with MyPlate as **I have very often seen or heard about it** (Female: 7% / Male: 2%).

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

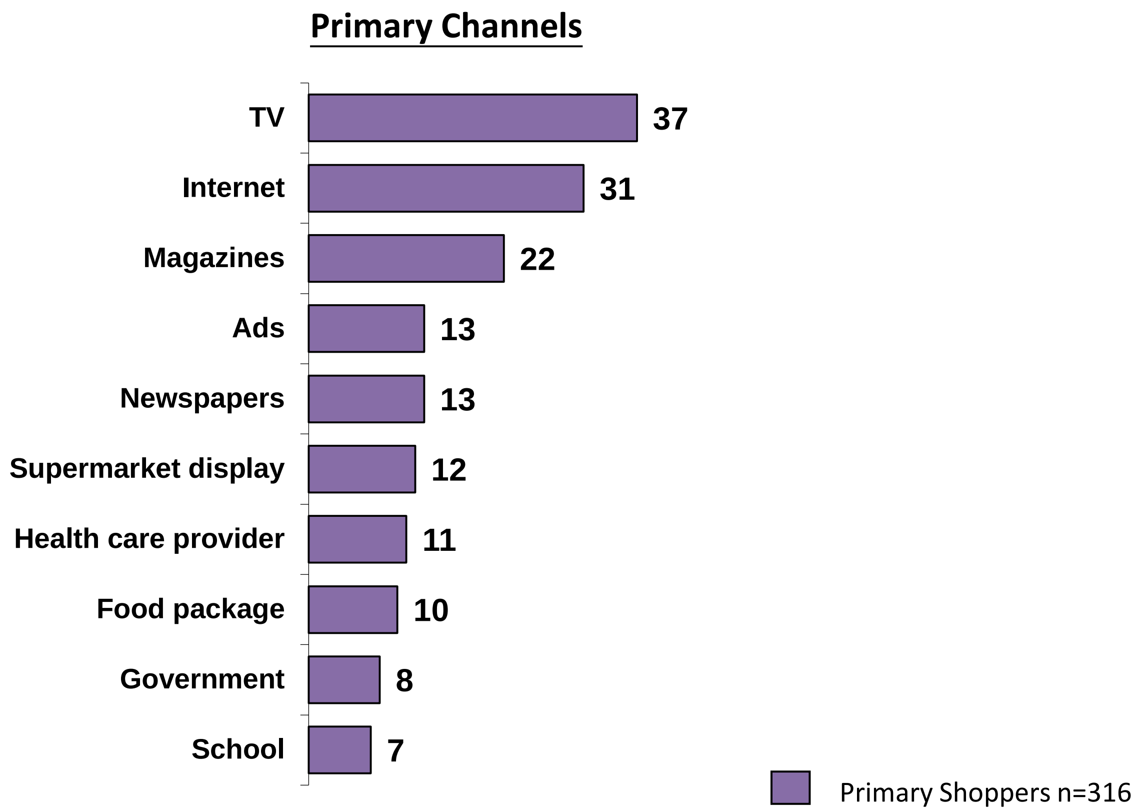
- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to describe their level of familiarity with MyPlate as **I have never seen or heard about it** (Lower Income: 48% / Higher Income: 40%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Older Primary Shoppers are more likely than Younger Primary Shoppers to describe their level of familiarity with MyPlate as **I have seen or heard about it** (Older: 25% / Younger: 20%).
- Younger Primary Shoppers are more likely than Older Primary Shoppers to describe their level of familiarity with MyPlate as **I have often seen or heard about it** (Younger: 9% / Older: 5%);

Q132: Which of the following statements best describes your level of familiarity with MyPlate?

Two-thirds of Primary Shoppers familiar with 'My Plate' saw or heard about it on TV or the Internet



% Respondents

**Primary Shoppers (those who have definitely seen or heard about the logo only)*

Q133. Where did you see or hear of 'MyPlate'? (Please select all that apply)

Where did you See or Hear about MyPlate

The following statistically significant differences were found amongst the following Primary Shoppers groups with regards to where they see or hear about MyPlate:

Male vs. Female Primary Shoppers

- Female Primary Shoppers are more likely than Male Primary Shoppers to see or hear about MyPlate from **magazines** (Female: 27% / Male: 17%).
- Male Primary Shoppers are more likely than Female Primary Shoppers to see or hear about MyPlate from:
  - **Food packages** (Male: 15% / Female: 7%);
  - **Billboards** (Male: 7% / Female: 2%)..

Married vs. Single Primary Shoppers

- Single Primary Shoppers are more likely than Married Primary Shoppers to see or hear about MyPlate from:
  - **The government** (Single: 15% / Married: 8%);
  - **Word of mouth** (Single: 12% / Married: 6%);

Lower vs. Higher Annual Household Income (Under $50,000 vs. $50,000 and over) Primary Shoppers

- Lower Income Primary Shoppers are more likely than Higher Income Primary Shoppers to see or hear about MyPlate from a **brochure** (Lower Income: 11% / Higher Income: 7%).

Younger vs. Older (34 years and Under vs. 35 years and Over) Primary Shoppers

- Younger Primary Shoppers are more likely than Older Primary Shoppers to see or hear about MyPlate from
  - **A health care provider** (Younger: 17% / Older: 11%);
  - **The government** (Younger: 14% / Older: 7%);
  - **A brochure** (Younger: 12% / Older: 7%);
  - **University** (Younger: 5% / Older: 1%).
- Older Primary Shoppers are more likely than Younger Primary Shoppers to see or hear about MyPlate from
  - **Magazines** (Older: 24% / Younger: 16%);
  - **A supermarket display** (Older: 13% / Younger: 8%);

Q133: Where did you see or hear about MyPlate?

Summary of Key Findings

Key Findings (slide 1 of 6)

Primary Shoppers

- The majority of Primary Shoppers feel their families eat too little fruit (56%) and too little vegetables (51%).

- When shopping for fruits and vegetables, Primary Shoppers consider freshness (66%) the most important factor, slightly ahead of cost (63%) and taste (62%). Remaining factors score well below these top three.

- When asked which tips would be most useful in helping to consume the recommended quantities of fruits and vegetables, the most popular responses are:
  - Cost saving tips (42%)
  - Greater variety of recipes (37%)
  - Tips on storage (33%)
  - New cooking techniques (32%)

- Almost one-in-five (18%) Primary Shoppers state they have purchased more fresh fruit than they did a year ago. Only 5% say they've purchased less. The percentages for fresh vegetables are similar - 17% say they've purchased more, while 6% say they've purchased less.

Key Findings (slide 2 of 6)

Moms

- The percentage of Moms who feel their families eat too little fruit has increased 6% vs last year and now stands at 53%. Conversely, those who feel they eat too little vegetables has decreased 6% to 57%.

- There appears to be slight erosion in support from spouses when it comes to the importance of including fruits and vegetables in meals and snacks:
  - Agreement with the statement "My spouse/partner believes it is important that our children include fruits and vegetables at meals and snacks" has fallen 5% this year vs last year (68% vs 73%)

- The feeling of responsibility continues to be strong with respect to promoting and enforcing the consumption of fruits and vegetables among family members.
  - Agreement with the statement "As a mom, it is important that I include fruits and vegetables in my family's meals and snacks" remains in the 90% range.
  - Agreement with the statement "In the next 3 months, I intend to include more fruits and vegetables in my family's meals and snacks each day" is stable at 76%.

Benefits

- Among both Primary Shoppers and Moms, the three key reasons for consuming fruits and vegetables are to stay healthy, to balance their diet, and the taste.
  - Primary Shoppers are more likely to say “part of a balanced diet” (60% vs 54% for Moms), as well as “like the taste” (52% vs 49% for Moms)
  - Moms are more likely to say “to lose weight” (24% vs 18% for Primary Shoppers), “to feel well” (22% vs 19%), and “to get energy” (21% vs 17% for Primary Shoppers)

- Both groups also agree that the three main issues or conditions that consuming fruits and vegetables can prevent are obesity, weight gain, and heart disease. Two-thirds or more of each group chose each of these.

- In terms of nutritional benefits, again both groups are aligned. The three key benefits among both Moms and Primary Shoppers are vitamins, fiber, and antioxidants.
  - As for the other benefits, Moms are more likely to say Protein (52% vs 48% for Primary Shoppers) and Water (60% vs 47% for Primary Shoppers)

Key Findings (slide 4 of 6)

Mom Strategies

- Almost half of Moms agree that key difficulties with respect to including fruits and vegetables in meals and snacks revolve around the following:
  - Different preferences among family members (51%)
  - Cost of fruit (49%)
  - New ways to prepare (47%)

- When asked which tips would be most useful in helping to consume the recommended quantities of fruits and vegetables, the most popular responses relate to the issues above:
  - Cost saving tips (53%)
  - Greater variety of recipes (47%)
  - Knowing what's in season (38%)
  - New serving suggestions (34%)

- The most popular approaches to encouraging more consumption within families pertain to setting a good example, novelty, and making fruits and vegetables more accessible.

- While Moms report success with the accessibility approach, the other two are less successful. Instead, involvement of children in the growing, selecting, and preparation process, though not as popular an approach, is believed to be successful.

Key Findings (slide 5 of 6)

Fruits &Veggies--More Matters

- Among Moms with kids 10 years old or younger, ‘definite’ awareness is down slightly from 2011 and stands at 22%, its second-highest level on record (behind last year).

- Other observations:
  - The percentage who find Fruits and Veggies – More Matters ‘very’ or ‘extremely’ motivating has increased 5% this wave to 36%
  - The More Matters logo is being associated with Healthiness and Nutrition more so than at any time in the past
  - However, purchase intent has remained flat at 45%
  - TV and Internet are growing as methods of awareness of More Matters; supermarkets are still primary

MyPlate

- The vast majority (85%) of Primary Shoppers believe that the recommended portion of their plates that should be made up of fruits and vegetables is 50-75%. However, actual consumption differs, as only 51% are consuming at this 50-75% level.

- ‘Definite’ awareness of MyPlate among Primary Shoppers stands at 32%, with an additional 21% not sure.

- The two leading sources of awareness of MyPlate are TV (37%) and the Internet (31%).

Key Findings (slide 6 of 6)

All Forms

- Almost two-thirds (65%) of Primary Shoppers throw out at least some of the fresh fruit they buy; over 80% throw out at least some of the fresh vegetables they buy.
- Each form of fruit and vegetable has different key reasons as to why it is purchased – e.g., fresh is considered most healthy and tastes good, whereas canned and frozen are easy to use, quick to prepare, and more favored because of cost. Canned, however, is most misunderstood in terms of healthfulness.
- Fresh is more likely to be purchased weekly; all other forms most often purchased monthly.
- Grocery stores are still the most popular location to purchase all forms of fruits and vegetables, with supercenters coming in second. More than a third of shoppers (36% for fruit, 37% for vegetables) report that they purchased fresh fruit and vegetables at farmer's markets in the previous 6 months.

Marketing Mix

- Supermarket flyer/newspaper ads/signs and TV commercials or news segments were ranked most effective by shoppers, followed by radio and then social media. QR codes ranked last. Younger shoppers rated social media more positively.

Appendix - Demographics

fruits & veggies more matters

Respondent Profile

MARITAL STATUS	2012 Gen X %	2012 Gen Y%	2011 Gen X %	2011 Gen Y %	2010 Gen X %	2010 Gen Y %	2009 %	2008 %	2007 %
Married/Living with someone	83	71	90	81	90	68	92	87	87
Single	9	24	4	15	4	29	3	5	5
Separated/Divorced	8	4	6	3	5	4	5	8	8
Widowed	-	-	<1	<1	<1	--	<1	<1	<1

SPOUSE'S EDUCATION	%	%	%	%	%	%	%	%	%
Did not finish high school	4	4	1	5	2	6	2	2	1
High school graduate	21	32	16	21	16	27	16	10	11
Some college	23	33	19	30	20	29	25	24	23
College graduate	30	23	37	31	36	26	31	35	37
Some graduate work	2	1	4	2	3	3	4	6	4
Completed graduate work	17	6	19	7	20	7	19	20	20
Trade/vocational school	3	1	3	3	3	3	3	4	4

WORK OUTSIDE THE HOME	%	%	%	%	%	%	%	%	%
No	44	54	48	58	43	57	38	29	31
Yes, Part-time	21	17	21	15	22	19	22	21	21
Yes, Full-time	35	25	31	26	35	24	41	50	48

GENDER	2012 Gen X %	2012 Gen Y %	2011 Gen X %	2011 Gen Y %	2010 Gen X %	2010 Gen Y %	2009 %	2008 %	2007 %	2006 %
Female	100	100	100	100	100	100	100	100	100	100

AGE	%	%	%	%	%	%	%	%	%	%
20-23	NA	44	NA	18	NA	26	NA	NA	NA	NA
24 - 29	-	56	NA	63	NA	74	<1	3	12	16
30 - 34	62	-	24	19	31	NA	31	27	35	35
35 - 41	15		53	NA	51	NA	55	71	54	49
42-44			24	NA	18	NA	13	NA	NA	NA

HHI			%	%	%	%	%	%	%	%
Less than $25K	9	21	4	16	4	30	4	4	3	2
$25K - $50K	25	40	9	43	12	39	12	12	14	20
$50K - $75K	28	26	21	24	22	19	22	22	22	26
$75K - $100K	17	8	27	9	25	8	25	25	26	22
$100K - $150K	21	6	26	6	25	3	24	25	22	21
$150K or more			13	2	13	1	14	13	12	9

OWN EDUCATION	%	%	%	%	%	%	%	%	%	%
Did not finish high school	1	1	1	4	1	4	1	<1	1	<1
High school graduate	17	27	12	15	12	25	16	6	7	5
Some college	28	36	24	39	25	41	25	23	20	25
College graduate	34	23	38	30	37	19	36	41	43	41
Some graduate work	4	4	6	4	5	3	5	6	7	8
Completed graduate work	13	6	18	7	17	6	15	22	20	17
Trade/vocational school	4	2	3	1	3	3	3	3	3	3

ETHNICITY	2012 Gen X %	2012 Gen Y %	2011 Gen X %	2011 Gen Y %	2010 Gen X %	2010 Gen Y %	2009 %	2008 %	2007 %	2006 %
White/Caucasian	79	71	83	76	82	65	84	84	83	81
Black/African American	8	6	6	9	5	12	4	4	5	7
Hispanic/Latino	5	9	5	7	7	14	5	4	4	6
Asian/Pacific Islander	7	7	6	7	5	6	6	6	6	5
Higher	1	6	1	2	1	2	1	2	2	2

Mean Age of Children	2012 Yrs	2011 Yrs.
Gen X	9	8
Gen Y	4	4

Respondent Profile

	2012		
MARITAL STATUS	Primary Shoppers Males	Primary Shoppers Females	Moms with kids 10 & under
Married/Living with someone	58	56	73
Single	26	20	13
Separated/Divorced	13	16	11
Widowed	3	9	3

SPOUSE'S EDUCATION	%	%	%
Did not finish high school	2	7	5
High school graduate	24	29	28
Some college	24	25	26
College graduate	25	25	36
Some graduate work	3	1	2
Completed graduate work	19	11	11
Trade/vocational school	3	3	3

WORK OUTSIDE THE HOME	%	%	%
No	42	55	53
Yes, Part-time	15	16	19
Yes, Full-time	43	29	28

	2012		
ETHNICITY	Primary Shoppers Males	Primary Shoppers Females	Moms with kids 10 & under
White/Caucasian	81	89	78
Black/African American	10	5	8
Hispanic/Latino	5	3	6
Asian/Pacific Islander	4	2	5
Mixed Race	-	1	2
Other	1	-	1

	2012		
GENDER	Primary Shoppers Males %	Primary Shoppers Females %	Moms with kids 10 & under %
Female	n/a	100	100
Male	100	n/a	n/a

AGE	%	%	%
18-24	12	12	17
25-34	14	9	25
35-44	14	9	27
45-44	19	22	21
55+	41	47	11

HHI	%	%	%
Less than $25K	20	23	16
$25K - $49,999K	31	33	31
$50K - $74,999K	24	23	26
$75K - $99,999K	12	11	14
$100K –or more	14	11	13

OWN EDUCATION	%	%	%
Did not finish high school	2	3	1
High school graduate	17	21	23
Some college	25	32	33
College graduate	32	23	27
Some graduate work	6	6	4
Completed graduate work	15	10	8
Trade/vocational school	3	5	3

Geographic Profile

“Atlantic”

NORTHEAST	12 X %	12 Y %	11 X %	11 Y %	10 X %	10 Y %	09 %	08 %	07 %	06 %
Connecticut	1	<1	1	1	2	1	<1	2	1	1
Maine	2	<1	1	1	<1	<1	<1	<1	<1	1
Massachusetts	2	1	2	1	2	1	4	2	3	2
New Hampshire	1	<1	1	1	1	1	1	<1	<1	<1
Rhode Island	-	1	<1	<1	1	--	<1	<1	<1	<1
Vermont	1	-	0	<1	<1	--	<1	<1	<1	--

MIDDLE ATLANTIC	12 X %	12 Y %	11 X %	11 Y %	10 X %	10 Y %	09 %	08 %	07 %	06 %
Delaware	<1	1	1	<1	1	<1	1	<1	<1	1
Maryland	2	2	1	2	1	2	2	2	1	2
New Jersey	6	2	6	3	5	1	3	3	3	3
New York	8	6	7	5	8	4	6	5	5	5
Pennsylvania	6	5	4	4	5	5	6	5	5	4
Washington	2	2	2	3	2	1	2	1	2	3

“Midwest”

MIDWEST	12 X %	12 Y %	11 X %	11 Y %	10 X %	10 Y %	09 %	08 %	07 %	06 %
Illinois	5	6	5	5	5	3	7	5	4	6
Indiana	2	3	3	3	4	2	3	2	2	2
Iowa	2	<1	1	<1	1	1	1	2	1	2
Kansas	<1	2	1	1	1	1	1	1	1	<1
Michigan	1	2	4	3	3	2	4	7	8	5
Minnesota	1	1	2	3	2	2	2	5	6	5
Missouri	3	4	2	4	2	2	2	2	3	1
Nebraska	1	4	1	1	<1	1	1	1	1	1
North Dakota	-	<1	0	0	<1	<1	<1	<1	1	1
Ohio	4	5	6	6	6	3	5	4	4	4
South Dakota	1	<1	0	<1	<1	<1	<1	<1	0	<1
Wisconsin	3	1	3	4	1	3	4	4	3	4

SOUTH	12 X %	12 Y %	11 X %	11 Y %	10 X %	10 Y %	09 %	08 %	07 %	06 %
Alabama	1	1	2	1	1	2	<1	1	1	1
Arkansas	1	1	<1	0	1	1	1	1	1	1
Florida	5	3	5	5	5	6	3	5	4	5
Georgia	4	6	4	4	2	5	1	3	3	4
Kentucky	1	<1	1	1	1	1	1	2	1	1
Louisiana	1	1	1	1	1	1	1	1	1	1
Mississippi	<1	<1	1	1	1	2	<1	<1	1	<1
North Carolina	5	2	4	3	4	4	3	3	3	2
South Carolina	1	2	1	1	1	2	1	1	2	1
Tennessee	2	2	2	2	1	2	2	2	2	2
Virginia	2	1	4	3	3	4	3	2	3	2
West Virginia	-	1	1	<1	1	<1	1	0	0	0

“West”

SOUTHWEST	12 X %	12 Y %	11 X %	11 Y %	10 X %	10 Y %	09 %	08 %	07 %	06 %
Arizona	3	2	1	1	2	2	2	2	1	2
New Mexico	-	<1	<1	0	<1	<1	<1	<1	<1	<1
Oklahoma	2	<1	1	2	1	--	1	1	1	1
Texas	6	8	7	7	6	9	8	10	10	11

WEST	12 X %	12 Y %	11 X %	11 Y %	10 X %	10 Y %	09 %	08 %	07 %	06 %
Alaska	-	-	<1	0	<1	1	0	<1	<1	<1
California	7	9	9	8	9	14	10	9	8	7
Colorado	3	2	1	2	2	<1	3	2	2	1
Hawaii	-	-	0	0	<1	1	<1	1	1	<1
Idaho	1	<1	<1	1	1	<1	<1	1	1	1
Montana	-	-	<1	0	<1	--	<1	<1	<1	<1
Nevada	<1	2	1	0	<1	1	<1	1	<1	1
Oregon	1	1	2	1	2	1	2	1	1	1
Utah	1	<1	1	3	1	1	1	1	<1	1
Wyoming	1	<1	<1	1	<1	1	<1	0	0	0

% Respondents

Geographic Profile

"Atlantic"

	2012		
NORTHEAST	Primary Shoppers Males %	Primary Shoppers Females %	Moms with kids 10 & under %
Connecticut	1	-	1
Maine	<1	-	1
Massachusetts	1	2	2
New Hampshire	1	<1	<1
Rhode Island	1	1	<1
Vermont	-	-	<1

MIDDLE ATLANTIC	Primary Shoppers Males %	Primary Shoppers Females %	Moms with kids 10 & under %
Delaware	1	-	1
Maryland	1	3	1
New Jersey	4	3	4
New York	7	9	7
Pennsylvania	6	6	6
Washington	2	3	2

"Midwest"

	2012		
MIDWEST	Primary Shoppers Males %	Primary Shoppers Females %	Moms with kids 10 & under %
Illinois	7	7	5
Indiana	3	2	3
Iowa	1	1	1
Kansas	1	1	2
Michigan	2	3	3
Minnesota	1	3	2
Missouri	2	2	3
Nebraska	-	1	1
North Dakota	-	-	<1
Ohio	6	5	5
South Dakota	-	<1	<1
Wisconsin	2	2	2

"South"

	2012		
SOUTH	Primary Shoppers Males %	Primary Shoppers Females %	Moms with kids 10 & under %
Alabama	1	1	2
Arkansas	<1	1	1
Florida	10	2	5
Georgia	2	3	5
Kentucky	1	2	1
Louisiana	1	1	1
Mississippi	<1	-	<1
North Carolina	3	4	3
South Carolina	<1	1	1
Tennessee	2	1	2
Virginia	1	2	2
West Virginia	1	1	<1

"West"

	2012		
SOUTHWEST	Primary Shoppers Males %	Primary Shoppers Females %	Moms with kids 10 & under %
Arizona	2	4	2
New Mexico	2	<1	<1
Oklahoma	<1	1	1
Texas	6	9	7

	2012		
WEST	Primary Shoppers Males %	Primary Shoppers Females %	Moms with kids 10 & under %
Alaska	<1	-	-
California	10	8	8
Colorado	1	2	2
Hawaii	<1	<1	-
Idaho	-	1	1
Montana	<1	1	-
Nevada	1	-	1
Oregon	2	1	1
Utah	<1	1	1
Wyoming	-	1	<1

% Respondents