*Research conducted by:*

On Research

*On behalf of:*

# PRODUCE FOR BETTER HEALTH FOUNDATION:

# Annual Mom Tracking Survey

## 2013

*Sponsored by:*

Del Monte Quality

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pma

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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 children 10 & under with fruits and vegetables: attitudes, consumption habits, benefits and barriers.
- Identify key significant differences between Generation X and Generation Y Moms and their relationship with fruits and vegetables

### ***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*
  - *When data from a generation is significantly lower than the other generation it is noted by a red circle*

- *The level of Income participants indicated was used to cut the data*
  - ***Low Income** (Less than $25,000 to $49,999)*
  - ***High Income** ($50,000 to $100,000 or more)*

- *The level of Education participants indicated was used to cut the data*
  - ***Less Educated** (Did not finish high school, High school graduate, Some college)*
  - ***More Educated** (College graduate, Some graduate work, Completed graduate school)*

# Methodology



| METHODOLOGY | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Wave** | Round 8 (2013) | 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 | Online survey conducted via an online panel |
| **Fielding Period** | January 16 – 28, 2013 | 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=700 [Moms with children 10 and under n=700 (Gen X n=350 – Gen Y n=350)] | n = 1300 (Moms with children 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)** | 3.7% (19/20 times) | 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)** ‘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 | Residents of the United States |
| **Gender** | Women only | Male/ Female | Women only | Women only | Women only | Women only | Women only | Women only |
| **Age** | Generation X” - born between 1965 and 1979 “Generation Y” – born between 1980 and 1990 | 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 children 10 yrs old and younger | Moms with children 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 |

# Summary of Key Findings

# Key Findings (Slide 1 of 5)



## Fruits & Veggies – More Matters

### *Moms with children 10 & under*

- Moms are now more familiar with 'Fruits & Veggies – More Matters' in comparison with any previous wave at 26%.
  - "Very Often" and "Often" selection options reached all times highs, which helped propel the increased familiarity .
- It is likely that the increased familiarity with the brand could have been due to Schools, Health Care Providers and Advertisements playing a larger role in creating awareness, as these primary channels reached all time highs as a source of awareness.
  - It should be noted that more traditional channels such as Television and Internet slightly declined.
- Of the moms familiar with 'Fruits & Veggies – More Matters', 74% had a favorable impression compared to 4% that had a unfavorable impression (+70%).
- Of the moms familiar with 'Fruits & Veggies – More Matters', 78% indicated that the brand reminds them to eat more fruits and vegetables while 75% said it was relevant to them.
- Moms find 'Fruits & Veggies – More Matters' helps motivate themselves to eat more fruits and vegetables at 41%, which is a 5% increase from the previous wave.
  - It should be noted that only 10% found the brand to not be motivating in comparison with 22% from the previous wave.
- Moms are more likely to have their purchase decision affected by the 'Fruits & Veggies – More Matters' logo. It is likely that the motivation to eat more Fruits & Vegetables as a result of seeing the 'More Matters' logo contributes to the increased likelihood of a purchase.
- Significantly less moms are associating the 'More Matters' Logo with 'Healthy' and 'Nutritious' in comparison with the previous waves.

# Key Findings (Slide 2 of 5)



## Fruits & Veggies – More Matters

### *Generation X and Generation Y*

- Familiarity and Overall Impression are nearly identical amongst the Generations, as there were minimal differences.
- Generation Y is more likely to have become familiar with the 'More Matters' logo through a Supermarket Display, Advertisement, Television, Internet and Health care provider in comparison with Generation X.
  - It should be noted all the mentioned channels above had a 3%+ difference .
- Generation X finds that the 'Fruits & Veggies – More Matters' motivates them to eat more Fruits and Vegetables in comparison with Generation Y. It is very likely that the differences in motivation is why members of Generation X would let the logo affect their likelihood of purchase more than Generation Y.
- Members of Generation Y associate 'Nutritious' significantly more with the 'More Matters' logo in comparison with Generation X. The same can be said for 'Healthy' ; however , it is not a significant difference.

## MyPlate

### *Moms with children 10 & under*

- Moms are significantly more familiar with MyPlate in comparison with the previous year.
  - It is likely that the increased familiarity can attributed to the Internet, Health Care Providers and Advertisements as these primary channels were significantly used more as sources of awareness in comparison with the previous year.

## MyPlate

### *Generation X and Generation Y*

- Familiarity was nearly identical, as there was only a difference of 2% between the two groups .

# Key Findings (Slide 3 of 5)



## Consumption & Availability

### *Moms with children 10 & under*

- Moms are trending towards consuming less fruits and vegetables on a daily basis.
  - Fruits: 1 to 4 Cups ( 2012 – 69% / 2013 – 59%) Vegetables: 1 to 4 Cups (2012 – 65% / 2013 – 59%).
- It is likely that the lack of Fruits and Vegetables available is contributing to the reduced consumption as 100% Juice, Canned and Dried forms are significantly less available. In most cases, the reported figures were all time lows.
- With regards to consumption, the average portion of Fruits & Vegetables making up a plate has declined from 43% to 40%. A similar trend is found with the recommended amount, as the average portion of Fruits & Vegetables has declined from 57% to 54%.

### *Generation X and Generation Y*

- Members of Generation X consume larger cups of Vegetables on a daily basis in comparison with Generation Y. There is virtually no difference amongst the Generations regarding portions consumed on a daily basis; however, the average recommended portion for Generation X was 56% in comparison with Generation Y's 52%.
- Members of Generation X have slightly more Fruits & Vegetables in general available in their home. The same can be said about Fresh Fruits and Frozen Vegetables. (Most selected amongst available options).
- Members of Generation X find it easier to get their family to eat Fruits & Vegetables at a Restaurant and harder at a Fast Food Establishment in comparison with Generation Y.
- Overall, Generation X consumes more Fruits & Vegetables in comparison with Generation Y. The availability of Fruits & Vegetables for each Generation is the likely cause of the differences in consumption.

# Key Findings (Slide 4 of 5)



## Attitudes & Opinions

### *Moms with children 10 & under*

- More Moms believe they eat 'Just Enough' Fruits (45%) while Less Moms believe they eat 'Too Little' (50%) in comparison with last year. Conversely, More Moms believe they eat 'Too Little' Vegetables (62%) while Less Moms believe they eat 'Just Enough' (35%).
- Significantly less Moms are finding 100% Fruit or Vegetable juice to be healthy. Similarly, Dried and Canned forms of Fruits & Vegetables are noticeably considered less healthy in comparison with last year.
- According to their level of agreement with particular statements, more Moms are receiving support to include Fruits & Vegetables in family meals and snacks. Similar to this trend, significantly more moms want to include a greater variety of Fruits & Vegetables in their family's meals. This could be partially attributed to the increased belief of the spouse/partner that it is important to include Fruits & Vegetables at meals and snacks for their children. Despite the health-conscious like beliefs, more Moms are finding eating increased amounts of Fruits & Vegetables to be a chore.
  - It should be noted that the comparisons made had significant differences in comparison with the previous year.
- Less Moms use the Television, Newspaper, Government Agency and School to obtain information on how to get your family to eat more Fruits & Vegetables.
  - The mentioned channels hit all-time lows in selection % in comparison with previous waves.

### *Generation X and Generation Y*

- Significantly less Moms from Generation X believe they eat 'too much' Fruits & Vegetables in comparison with Moms from Generation Y.
- Members of Generation X believe Fresh and Frozen Fruits & Vegetables are more healthy while Generation Y believes 100% Juice, Canned, Fruit-based snacks and Fruit Flavorings are more healthy.

## Attitudes & Opinions

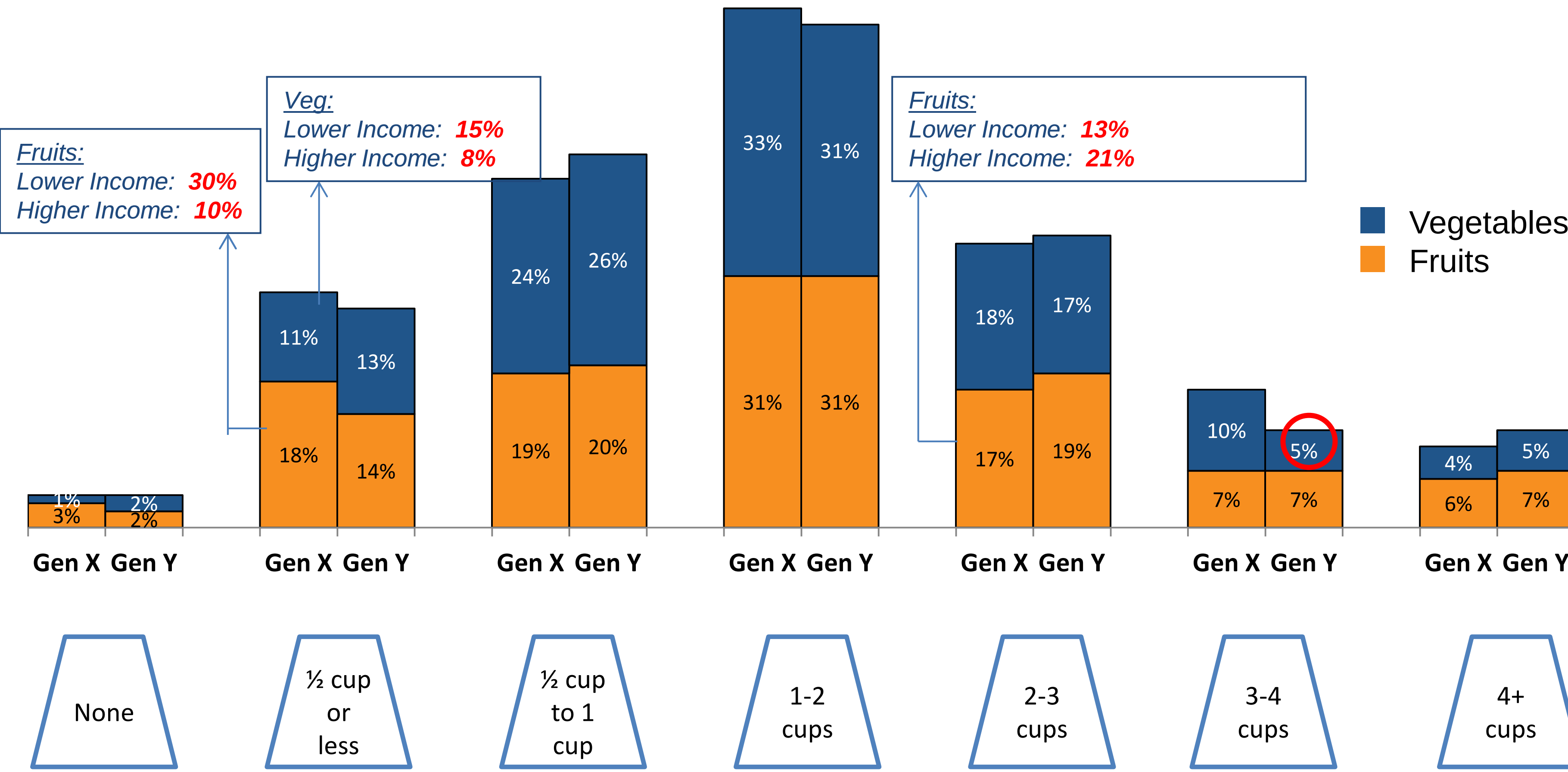
### *Generation X and Generation Y*

- Moms from Generation X slightly feel that it is more important to include Fruits & Vegetables in their family's meals and snacks (+3%); however, Moms from Generation Y are more likely to include an increased amount of Fruits & Vegetables during snacks and Meals in the next 3 months (+5%).
- Members of Generation X are more likely to use common sources of information that include the Internet and Magazines while members of Generation Y are more likely to use traditional sources of information that include a Nutritionist/Dietitian, Family Member and/or a Newspaper.

# Consumption & Availability

# Moms generally self-report consuming 1-2 cups of fruits and vegetables per day, with Gen Y mom consuming a little less vegetables than their Gen X counterparts and lower income moms consuming less fruit than higher income moms.

*Daily Self-reported Consumption of Fruits and Vegetables*




= significantly lower than the other Generation

*Generation X n=350
*Generation Y n=350
*% Respondents*

*Q7/8. About how many cups of fruit / vegetables (including 100% Juice) do you eat or drink each day?*

# Daily Self-reported Consumption of Fruits and Vegetables



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

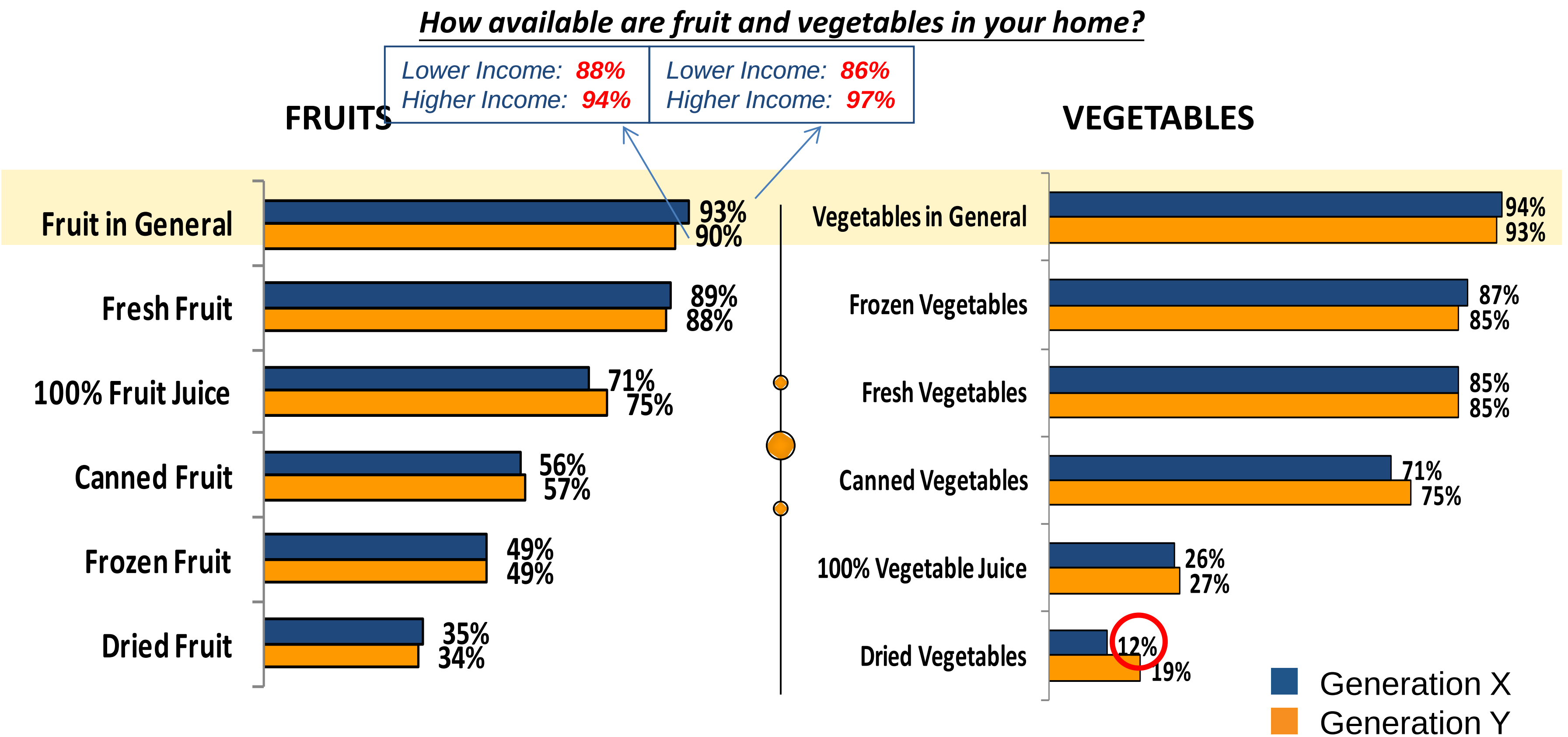
| Fruits | Vegetables |
|---|---|
| **Low Income vs. High Income**<br>➢ Low income Moms are more likely than High income Moms to consume ½ Cup or less of fruits on a daily basis (Low Income: 21%/ High Income 10%)<br>➢ High income Moms are more likely than Low income Moms to consume 2-3 Cups or less of fruits on a daily basis (Low Income: 15%/ High Income 21%)<br><br>**Less Education vs. More Educated**<br>➢ Less Educated Moms are more likely than More Educated Moms to consume NO fruits on a daily basis (Less Educated: 5%;/ More Educated 2%)<br><br>**Regions**<br>➢ Moms from the Midwest are more likely than Moms from the West to consume NO fruits on a daily basis (Midwest: 5% / West: 1%) | **Low Income vs. High Income**<br>➢ Low Income Moms are more likely than High Income Moms to consume NO vegetables on a daily basis (Low Income: 3% / High Income: 1%)<br>➢ Low Income Moms are more likely than High Income Moms to consume ½ Cup or less of vegetables on a daily basis (Low Income: 15% / High Income: 9%)<br>➢ High Income Moms are more likely than Low Income moms to consume 3-4 Cups of vegetables on a daily basis (Low Income: 5% / High Income: 9%) |

*Q7/8. About how many cups of fruit / vegetables (including 100% Juice) do you eat or drink each day?*

# Fresh fruits and vegetables are the most popular forms. Lower income moms self- report having less fruit available in their homes than higher income moms.



*Availability in the Home of Various Forms of Fruits and Vegetables*




= significantly lower than the other Generation

*Generation X n=350
*Generation Y n=350
*% Respondents*

*Q11. Please rate the availability of fruit and vegetables in your home.*

# Availability in the Home of Various Forms of Fruits and Vegetables



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

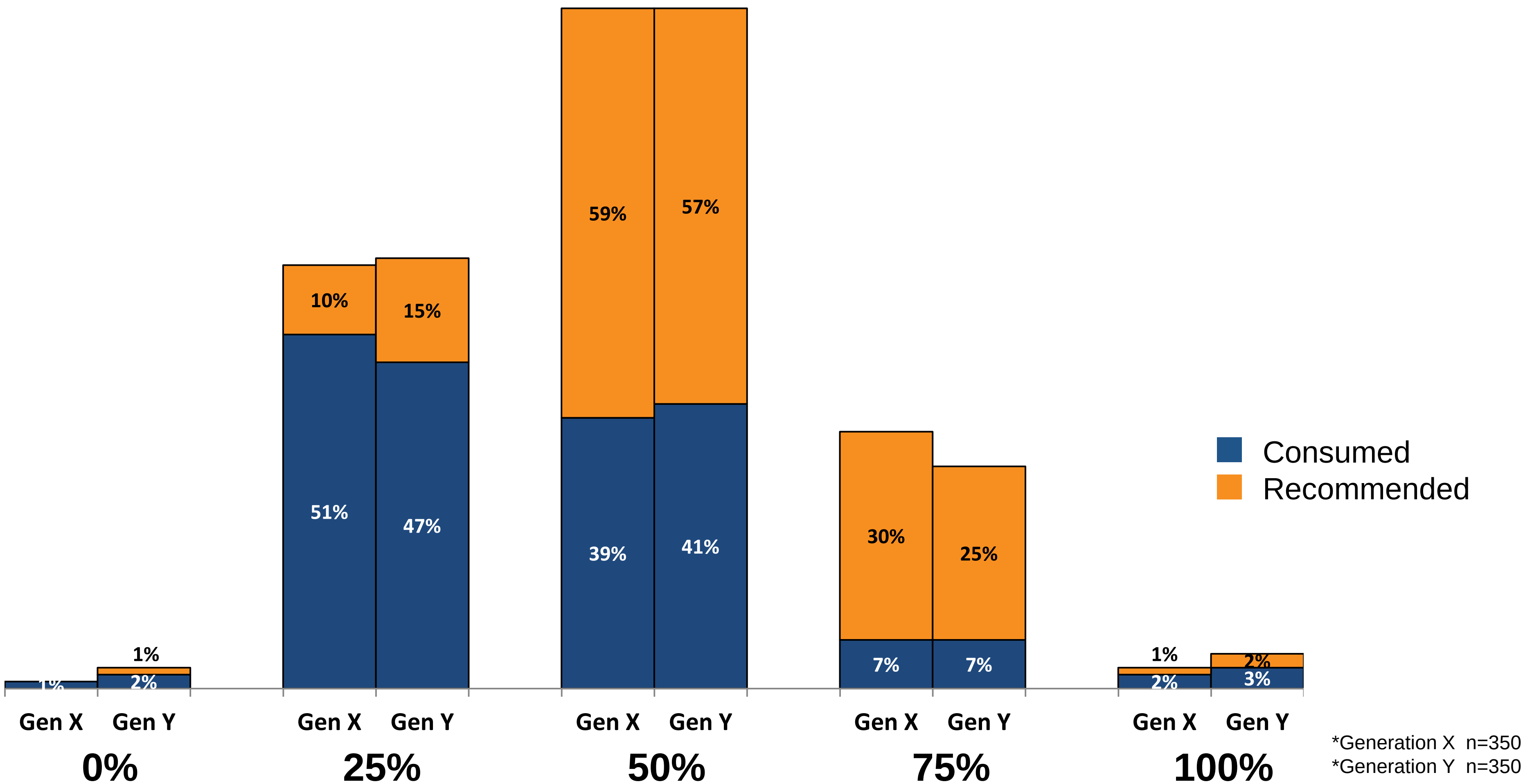
| Available in the Home | Not Available in the Home |
|---|---|
| **Low Income vs. High Income** | **Low Income vs. High Income** |
| ➢ Fruits in General: (Low Income: 87% / High Income: 96%) | ➢ Fruits in General: (Low Income: 13% / High Income: 4%) |
| ➢ Fresh Fruit: (Low Income: 84% / High Income: 93%) | ➢ Fresh Fruit: (Low Income: 16% / High Income: 7%) |
| ➢ Canned Vegetables: (Low Income: 76% / High Income: 69%) | ➢ Canned Vegetables: (Low Income: 24% / High Income: 31%) |
| ➢ 100% Vegetable Juice: (Low Income: 31% / High Income: 21%) | ➢ 100% Vegetable Juice: (Low Income: 69% / High Income: 79%) |
| ➢ Dried Vegetables: (Low Income: 21% / High Income: 11%) | ➢ Dried Vegetables: (Low Income: 79% / High Income: 89%) |
| **Less Educated vs. More Educated** | **Less Educated vs. More Educated** |
| ➢ Fruits in General: (Less Educated: 87% / More Educated: 94% ) | ➢ Fruits in General: (Less Educated: 13% / More Educated: 6%) |
| ➢ Fresh Fruit: (Less Educated: 85% / More Educated: 91% ) | ➢ Fresh Fruit: (Less Educated: 15% / More Educated: 9%) |
| ➢ Canned Vegetables: (Less Educated: 78% / More Educated: 69%) | ➢ Canned Vegetables: (Less Educated: 22% / More Educated: 31%) |
| ➢ Dried Fruit: (Less Educated: 30% / More Educated: 38% ) | ➢ Dried Fruit: (Less Educated: 70% / More Educated: 62%) |
| ➢ Dried Vegetables: (Less Educated: 20% / More Educated: 13%) | ➢ Dried Vegetables: (Less Educated: 80% / More Educated: 87%) |
| **Region** | **Region** |
| ➢ Fruits in General: (Midwest: 89% / West: 95% ) | ➢ Fruits in General: (Midwest: 11% / West: 5%) |
| ➢ Fresh Fruit: (Midwest: 85% / West: 92% ) | ➢ Fresh Fruit: (Midwest: 15% / West: 8%) |
| ➢ Fresh Vegetables: (Midwest: 80% / West: 90% ) | ➢ Fresh Vegetables: (Midwest: 20% / West: 10%) |
| ➢ Frozen Fruit: (Midwest: 44% / West: 55% ) | ➢ Frozen Fruit: (Midwest: 56% / West: 45%) |
| ➢ !00% Vegetable Juice: (South: 33%/ West 22%) | ➢ 100% Vegetable Juice: (South: 67% / West: 78%) |

*Q11. Please rate the availability of fruit and vegetables in your home.*

# Moms self-report consuming less fruits and vegetables than what they believe to be the recommended amounts.



*Portion of plate made of vegetables and fruits: Self-reported consumption vs. Perceived to be recommended*




*Generation X n=350
*Generation Y n=350
*% Respondents*

*Q23. 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)?/ Q24. What portion of your 'plate' (total food consumed) is RECOMMENDED to be made up of fruits and vegetables?*

# Portion of plate made of vegetables and fruits: Self-reported consumption vs. Perceived to be recommended



The following statistically significant differences were found amongst the following groups with regards to the consumption and recommended amount of fruits and vegetables:

| Consumed | Recommended |
|---|---|
| **There were no statistically significant differences for this section** | **Less Educated vs. More Educated**<br>➢ Less Educated Moms are more likely to have a 25% portion of fruits and vegetables recommended in comparison with those that are More Educated<br>(Less Educated: 15% / More Educated 8%)<br>➢ More Educated Moms are more likely to have a 75% portion of fruits and vegetables recommended in comparison with those that are Less Educated<br>(Less Educated: 20%/ More Educated: 26%)<br>**Region**<br>➢ Moms from the West are more likely to have a 25% portion of fruits and vegetables recommended in comparison with those that are from the South<br>(South" 7%/ West: 14%) |

*Q23. 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)?/ Q24. What portion of your 'plate' (total food consumed) is RECOMMENDED to be made up of fruits and vegetables?*

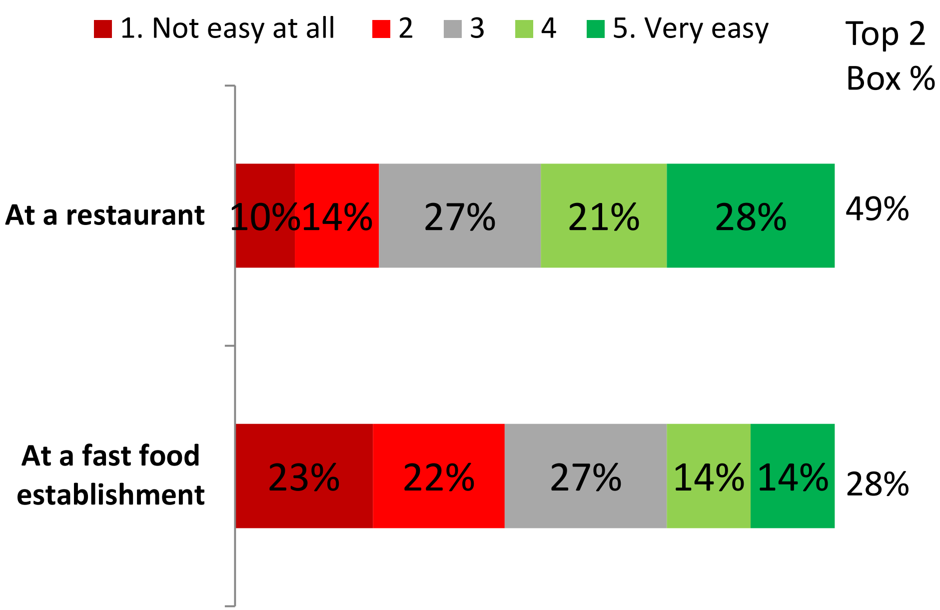
# Moms find it difficult to get their families to eat fruits and vegetables, particularly vegetables, at fast food establishments.



*Ease in Getting Families to Eat Fruits and Vegetables at a Restaurant and Fast Food Establishments*

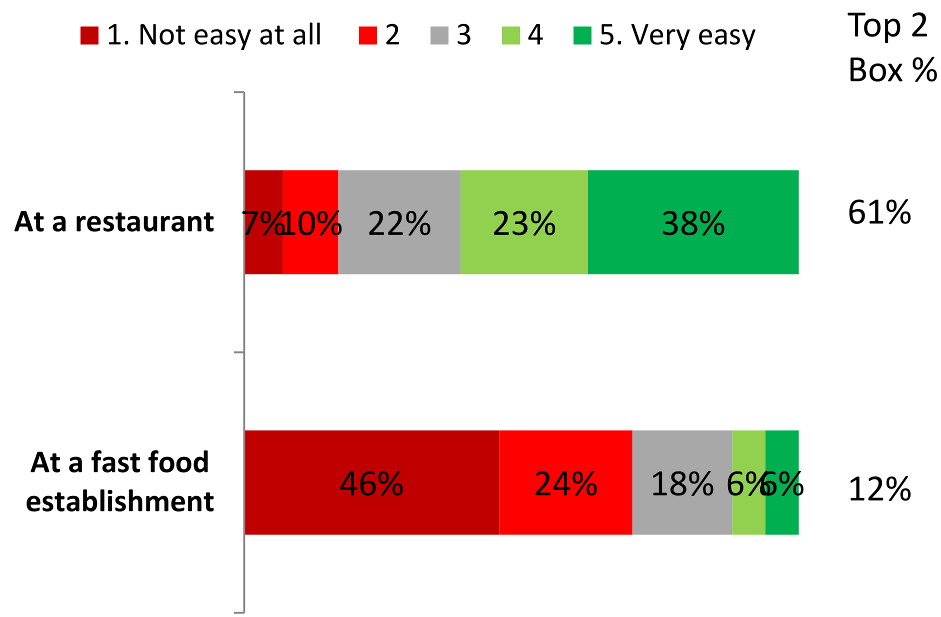
***How easy is it for you to get your family to eat fruit and vegetables at the following times:***

## Fruits




At a fast food establishment: n=663
At a restaurant: n=685

## Vegetables




At a fast food establishment: n=658
At a restaurant: n=686

*Don't know/Not applicable is excluded from the base*

*Q13/14: How easy is it for you to get your family to eat Vegetables/Fruits at the following times?*

# Ease in Getting Families to Eat Fruits and Vegetables at a Restaurant and Fast Food Establishments



The following statistically significant differences were found amongst the following groups with regards to how easy it is to get fruits and vegetables at certain times:

| Easy | Not Easy |
|---|---|
| **Vegetables**<br>**Low Income vs. High Income**<br>➢ Low income Moms are more likely to find it easy to get vegetables at a fast food establishment in comparison with Moms with a High income<br>(Low Income: 17% / High Income: 8%)<br><br>**Region**<br>➢ Moms from the Midwest and South are more likely to find it easy to get vegetables at a restaurant in comparison with those Moms from the North East<br>(North East: 52% / Mid-West: 65%/ South: 69%)<br><br>**Fruits**<br>**Region**<br>➢ Moms from the South are more likely to find it easy to get fruits at a restaurant in comparison with those Moms from the North East<br>(North Easy: 42% / South: 55%)<br>➢ Moms from the South are more likely to find it easy to get fruits at a fast food establishment in comparison with those moms from the North East, Mid-West and West<br>(North East: 25%/ Mid-West: 25%/ South: 38% / West: 27%) | **Vegetables**<br>**Low Income vs. High Income**<br>➢ High income Moms are more likely to not find it easy to get vegetables at a fast food establishment in comparison with Low income Moms<br>(Low Income: 64% / High Income: 77%)<br><br>**Region**<br>➢ Moms from the North East are more likely to find it not easy to get vegetables at a restaurant in comparison with those Moms from the South<br>(North East: 22% / South: 12%)<br><br>**Fruits**<br>**Low Income vs. High Income**<br>➢ High Income moms are more likely to not find it easy to get Fruits at a fast food establishment in comparison with Moms with a Low Income<br>(Low Income: 41%/ High Income: 50%)<br><br>**Region**<br>➢ Moms from the North East are more likely to not find it easy to get fruits at a restaurant in comparison with Moms from the South and West<br>(North East: 31%/ South: 21%/ West: 20%)<br>➢ Moms from the North East are more likely to not find it easy to get fruits at a fast food establishment in comparison with Moms from the South<br>(North East: 51% / South: 39%) |

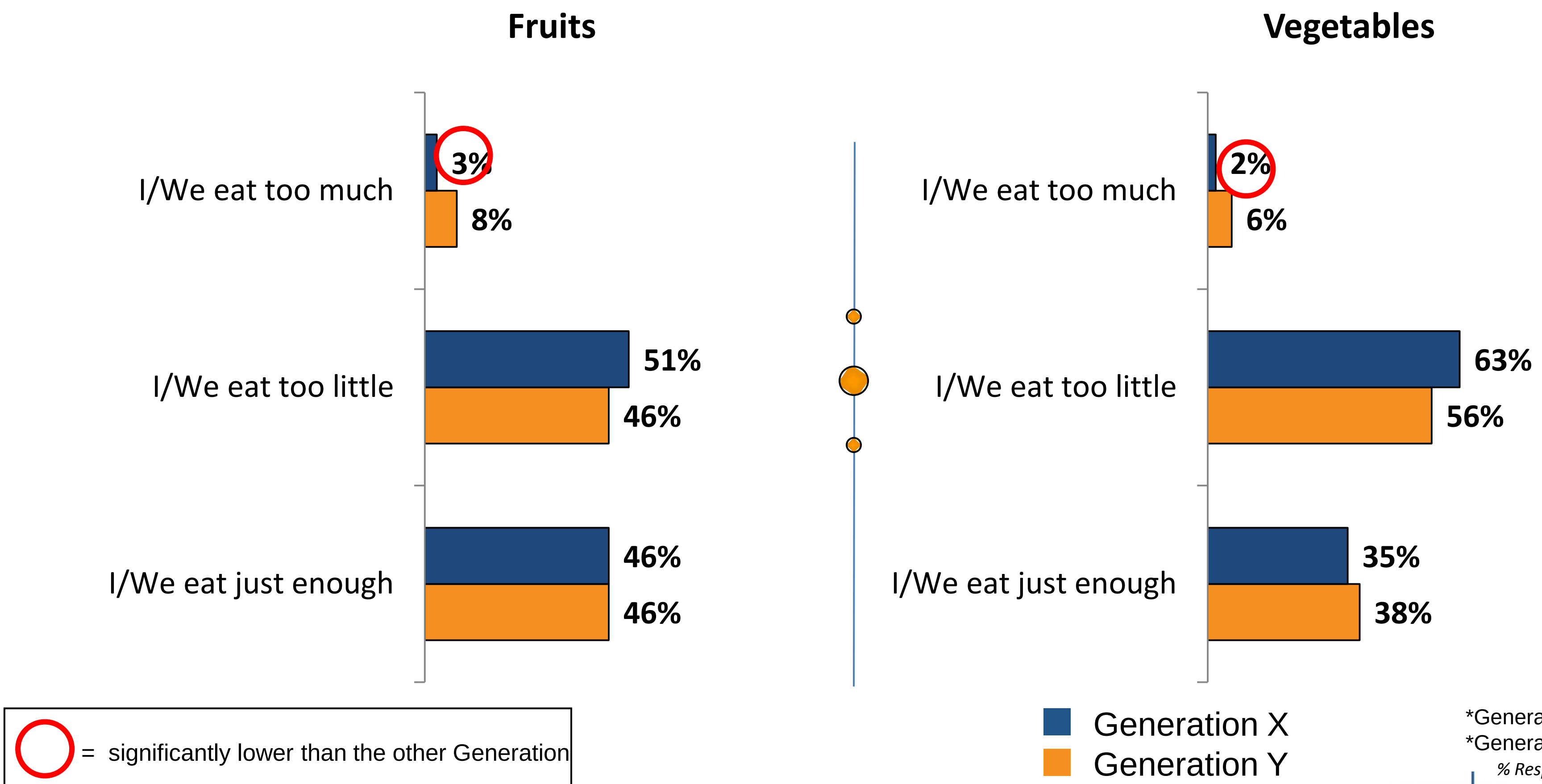
*Q13/14: How easy is it for you to get your family to eat Vegetables/Fruits at the following times?*

# Attitudes & Opinions

# The majority of moms feel they and their families eat too little fruits and vegetables, particularly vegetables.



*Perceptions regarding Adequacy of Personal and Family Consumption of Fruits and Vegetables*




*Generation X n=350
*Generation Y n=350
*% Respondents*

Q9. Which of these statements best represents you or your family's eating habits for each of the following?

# Perceptions regarding Adequacy of Personal and Family Consumption of Fruits and Vegetables



The following statistically significant differences were found amongst the following groups with regards to eating habits for fruits and vegetables:

| Fruits | Vegetables |
|---|---|
| **Less Educated vs. More Educated**<br>➢ Less educated Moms are more likely to eat too little fruits in comparison with More Educated Moms (Less Educated: 54%/ More Educated: 45%)<br>➢ More Educated Moms are more likely to eat just enough fruits in comparison with Less Educated Moms (Less Educated: 41% / More Educated: 49%)<br><br>**Region**<br>➢ Moms from the Mid West are more likely to eat too little fruits in comparison with Moms from the North East (North East: 43% / Mid West: 54%)<br>➢ Moms from the North East are more likely to eat just enough fruits in comparison with Moms from the Mid West (North East: 51%/ Mid west: 41%) | **There were no statistically significant differences for this section** |

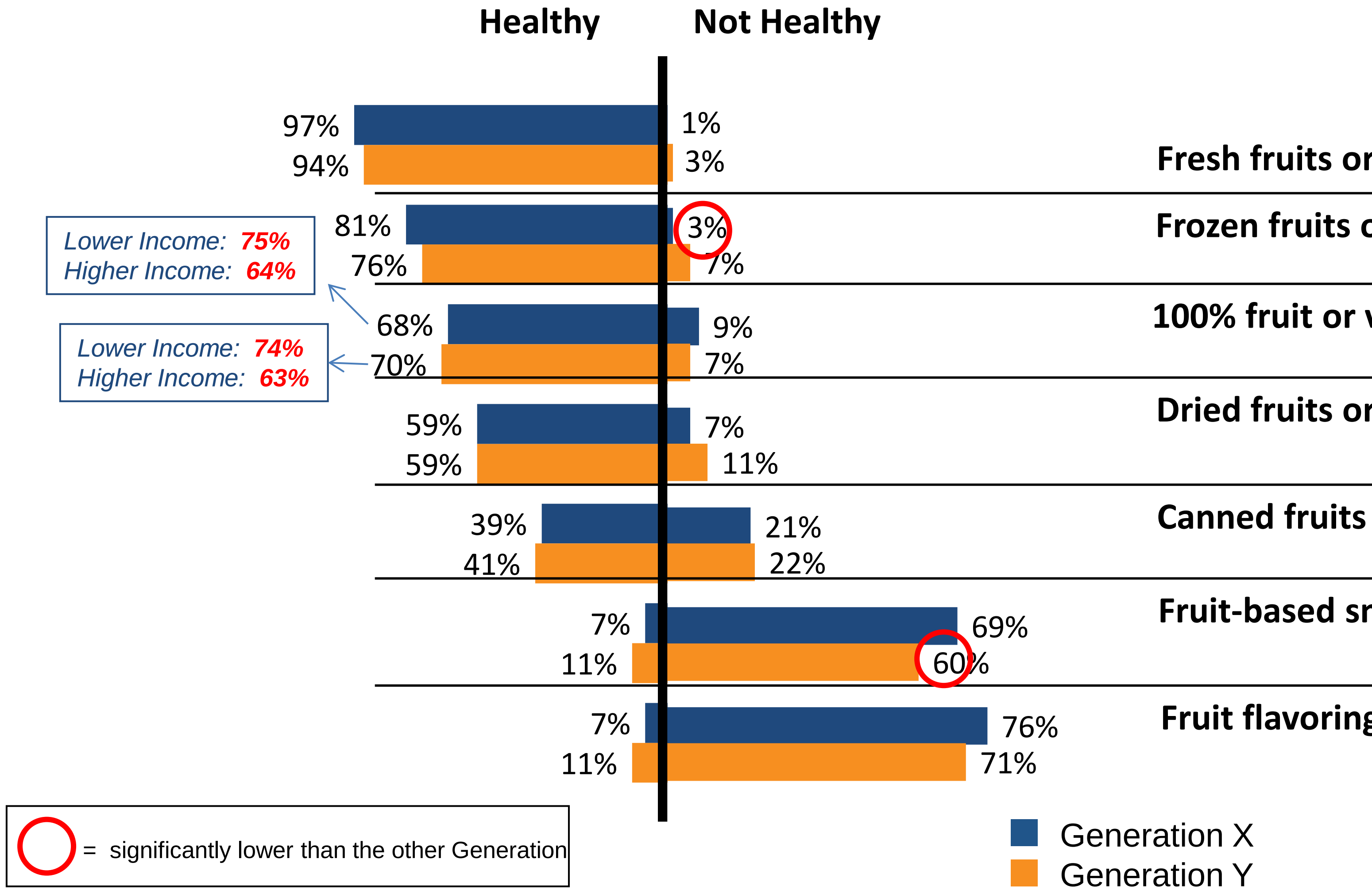
Q9. Which of these statements best represents you or your family's eating habits for each of the following?

# Fresh fruits and vegetables are, by far, perceived to be the healthiest, followed by frozen. Lower income moms are more likely to perceive juice as healthy compared to their higher income counterparts.



*Perceived Healthiness of Various Forms of Fruits and Vegetables*

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




*Generation X n=350
*Generation Y n=350
*% Respondents*

*Q10. In general, how healthy do you consider the following foods to be?*

# Perceived Healthiness of Various Forms of Fruits and Vegetables



The following statistically significant differences were found amongst the following groups with regards to how healthy fruits and vegetables are when served in different ways:

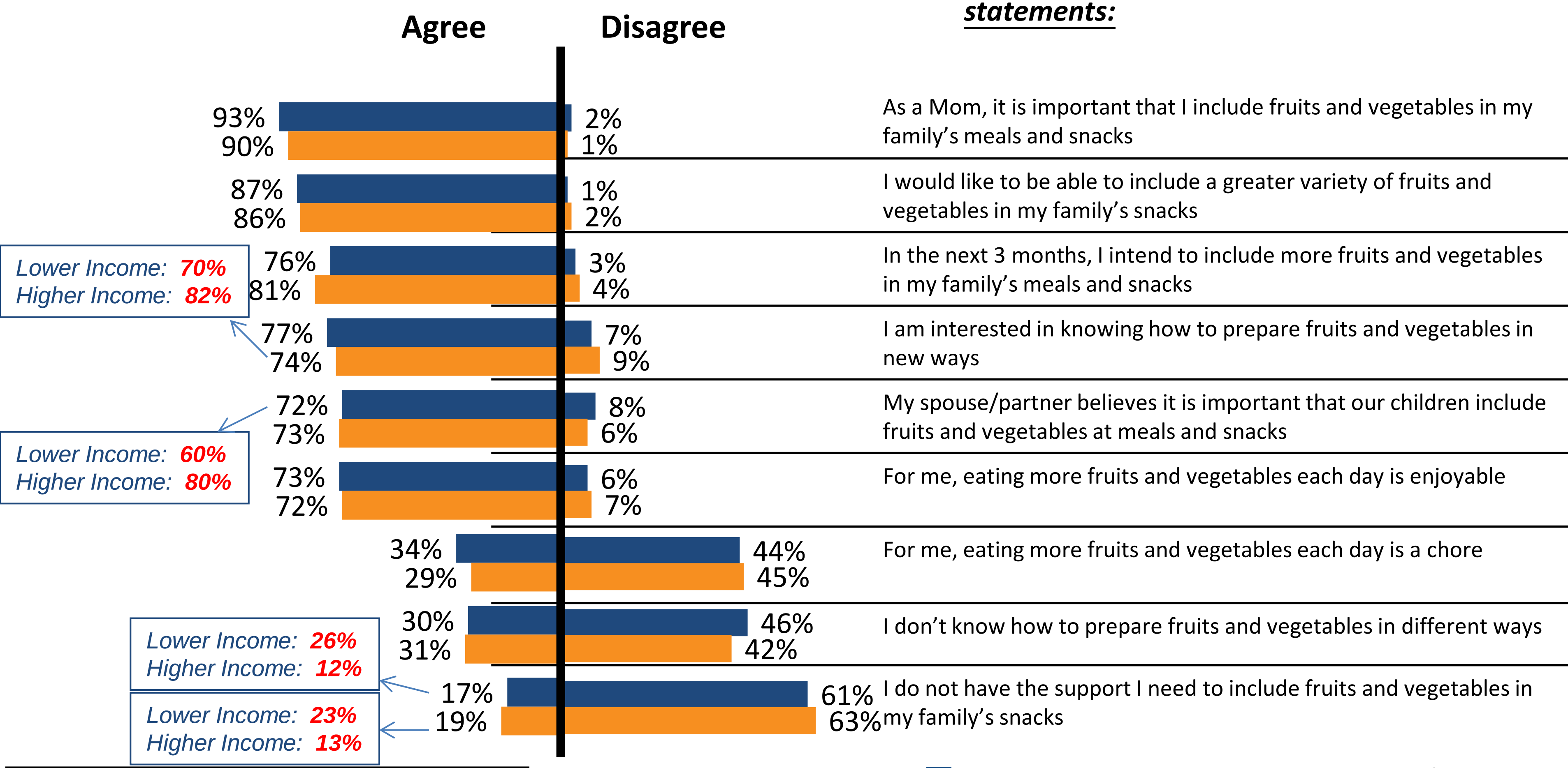
| Healthy | Unhealthy |
|---|---|
| **Low Income vs. High Income**<br>➢High Income Moms are more likely to consider Fresh fruits or vegetables to be healthy in comparison with Low Income Moms (Low Income: 94% / High Income: 97%)<br>➢High Income Moms are more likely to consider Frozen fruits or vegetables to be healthy in comparison with Low Income Moms (Low Income: 75% / High Income: 81%)<br>➢Low Income Moms are more likely to consider 100% fruit or vegetable juice to be healthy in comparison with High Income Moms (Low Income: 74%/ High Income: 64%)<br><br>**Region**<br>➢Moms from the Mid West are more likely to consider Canned fruits or vegetables to be healthy in comparison with Moms from the North East (North East: 35%/ Mid West: 47%)<br>➢ Moms from the North East are more likely to consider Fruit flavorings to be healthy in comparison with Moms from the Mid West (North East: 13%/ Mid West: 6%) | **Low Income vs. High Income**<br>➢Low Income Moms are more likely to find Frozen fruits or vegetables to be unhealthy in comparison with High Income Moms (Low Income: 7% / High Income: 3%)<br>➢ High Income Moms are more likely to find 100% fruit or vegetable juice to be unhealthy in comparison with Low Income Moms (Low Income: 5%/ High Income: 11%)<br>➢High Income Moms are more likely to find Fruit-based snacks to be unhealthy in comparison with Low Income Moms (Low Income: 58%/ High Income: 70%)<br>➢ High Income Moms are more likely find Fruit flavorings to be unhealthy in comparison with Low Income Moms (Low Income: 68%/ High Income: 78%)<br><br>**Less Educated vs. More Educated**<br>➢More Educated Moms are more likely to find Fruit Flavorings to be unhealthy in comparison with Less Educated Moms (Less Educated: 68%/ More Educated: 76%)<br><br>**Region**<br>➢Moms from the West are more likely to find Frozen fruits and vegetables to be unhealthy in comparison with Moms from the South (South: 1%/ West:7%)<br>➢Moms from the North East are more likely to find Canned fruits or vegetables to be unhealthy in comparison with Moms from the Mid West (North East: 26%/ Mid West: 18%)<br>➢Moms from the Mid West are more likely to find Fruit-based snacks to be unhealthy in comparison with Moms from the West (Mid West: 71%/ West: 60%) |

*Q10. In general, how healthy do you consider the following foods to be?*

# The majority of moms feel that eating fruits and vegetables is important. A significant percentage, however, need more support.

*Attitudes toward Fruits and Vegetables*

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




= significantly lower than the other Generation

Generation X
Generation Y

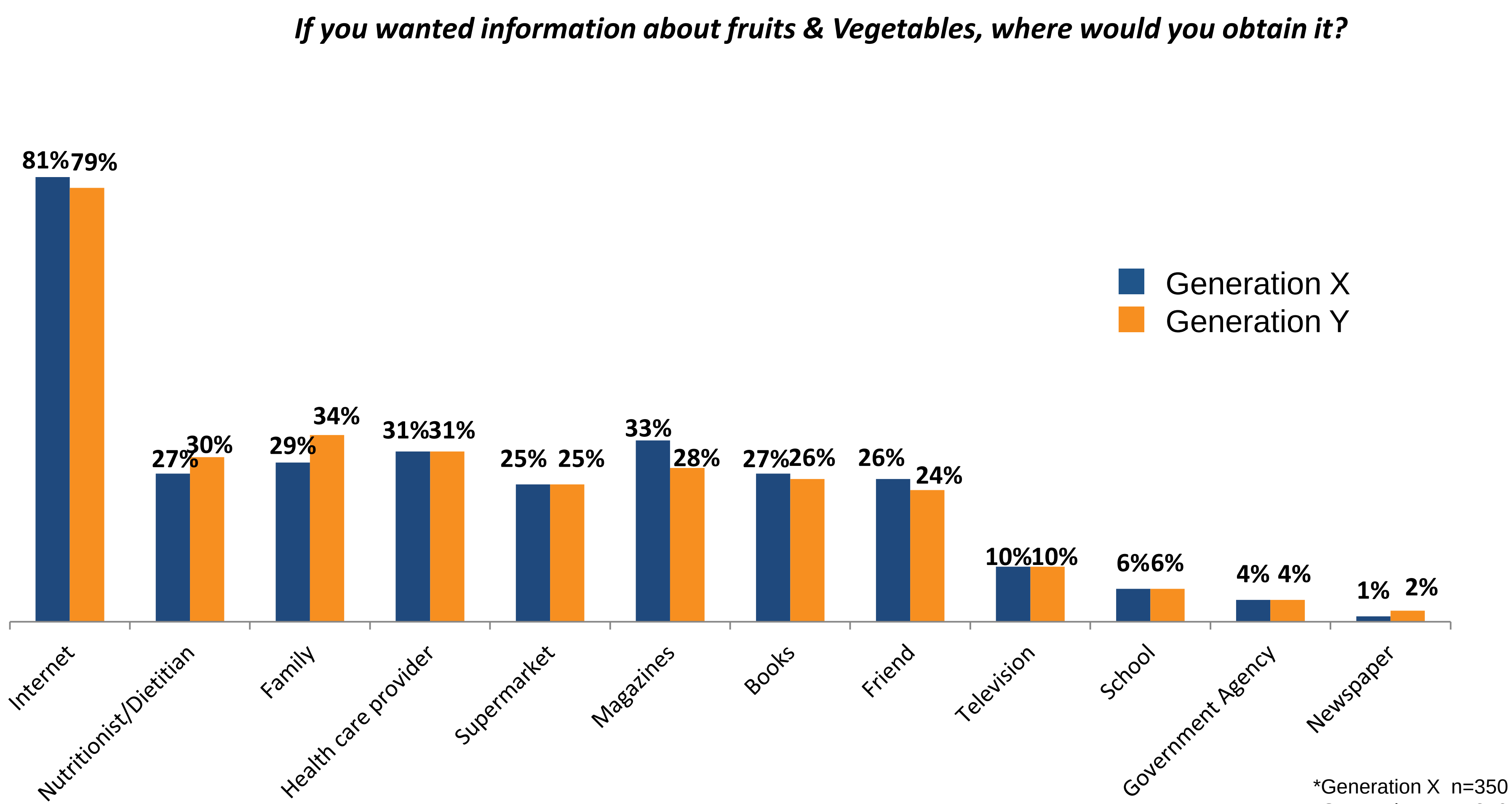
*Generation X n=350
*Generation Y n=350
*% Respondents*

*Q12. Please rate your level of agreement or disagreement with the following statements:*

# The Internet is, by far, the most popular source of information regarding fruits and vegetables.



*Sources of Information regarding Fruits and Vegetables*



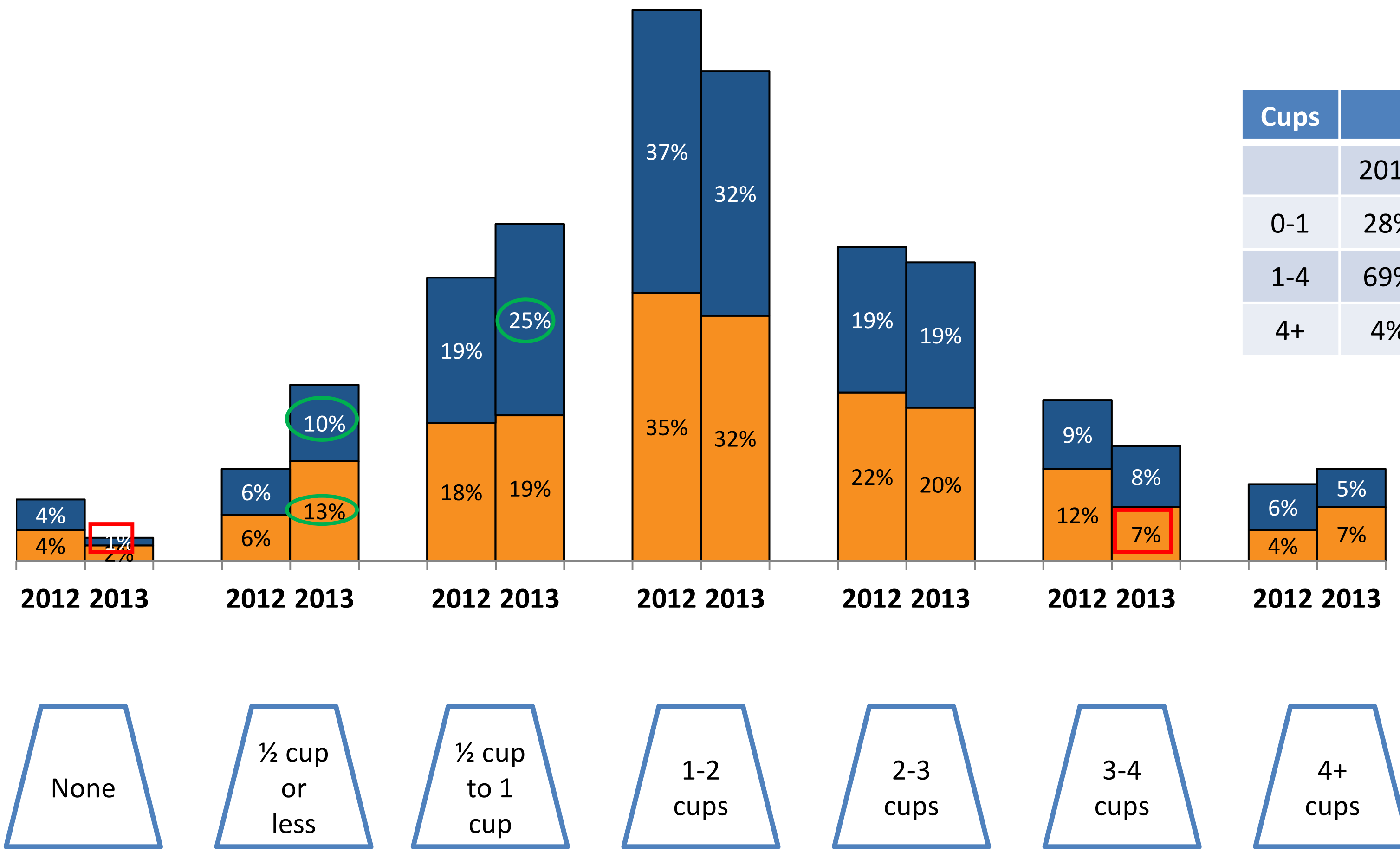

*Generation X n=350
*Generation Y n=350
*% Respondents*

Q15. If you wanted information about how to get yourself and/or your family to eat more fruits and vegetables, where would you go to obtain it?

# Cross-Time Comparisons of Moms with Children (10 years old and younger)

# Self-reported consumption of both fruits and vegetables is lower compared to last year.

*Daily Self-reported Consumption of Fruits and Vegetables*




| Cups | Fruits | | Vegetables | |
|---|---|---|---|---|
| | 2012 | 2013 | 2012 | 2013 |
| 0-1 | 28% | 34% | 29% | 36% |
| 1-4 | 69% | 59% | 65% | 59% |
| 4+ | 4% | 7% | 6% | 5% |

Vegetables
Fruits

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

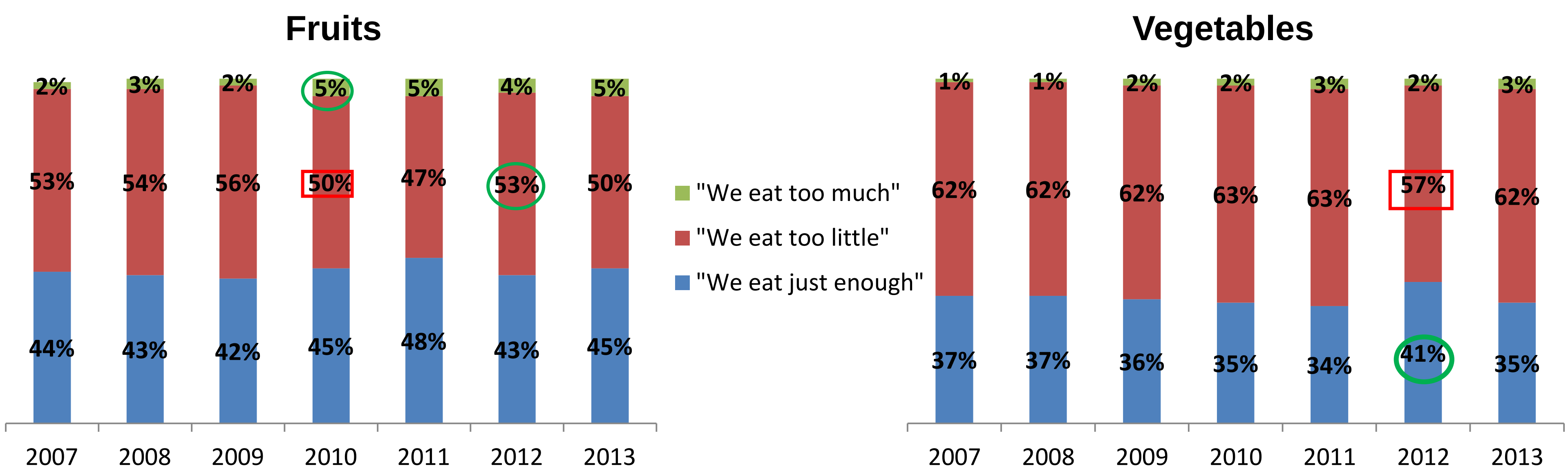
2013 n=700
2012 n=700

*% Respondents*

*Q7/8. About how many cups of fruit / vegetables do you eat or drink each day?*

# The majority of moms have consistently felt that they and their families eat too little fruits and vegetables, particularly vegetables.

*Perceptions regarding Adequacy of Personal and Family Consumption of Fruits and Vegetables*




= significantly higher than previous wave

= significantly lower than previous wave

2013 n=700
2012 n=700
2011 n=1270
2010 n=1037
2009 n=761
2008 n=803
2007 n=896

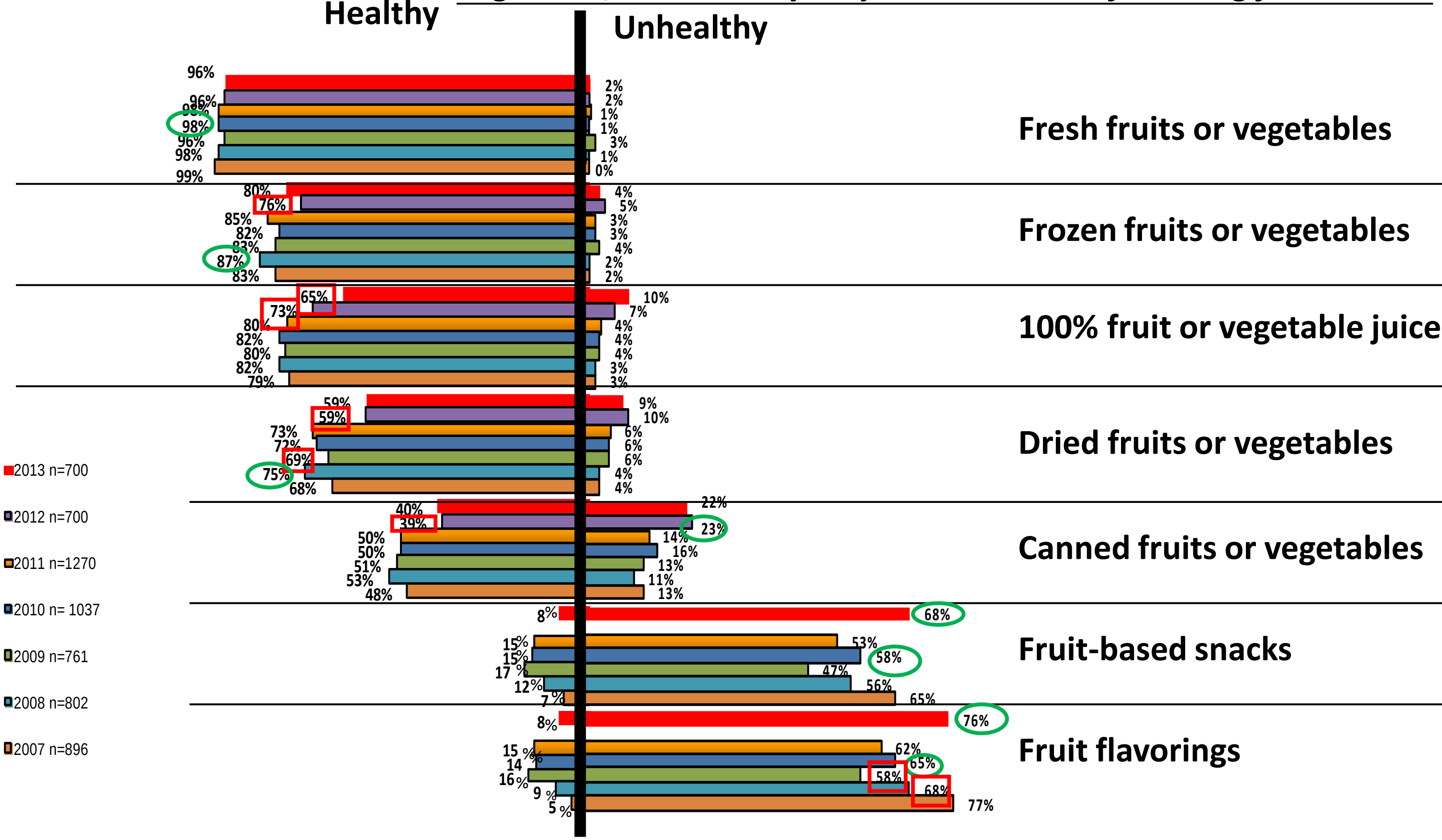
*% Respondents*

Q9. Which of these statements best represents you or your family's eating habits for each of the following?

# Frozen was more likely to be perceived as healthy compared to last year while 100% juice was less likely to be perceived as healthy.

*Perceived Healthiness of Various Forms of Fruits and Vegetables*

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




| Net Score | |
|---|---|
| 2013 | 2012 |
| +94% | +94% |
| +76% | +71% |
| +55% | +66% |
| +50% | +49% |
| +18% | +16% |
| -60% | |
| -68% | |

*All Moms with children 10 & under*

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

*% Respondents*

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

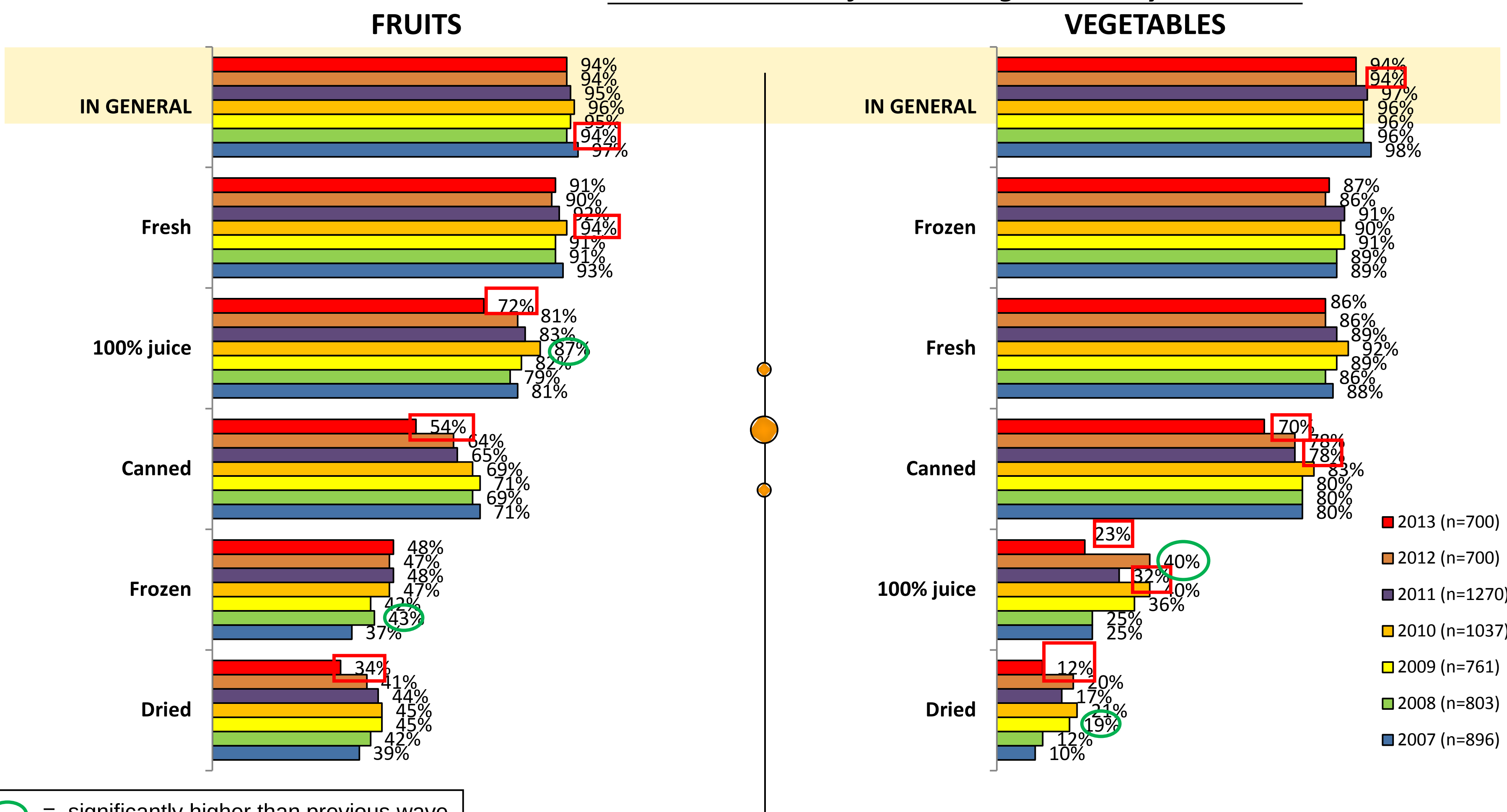
*Q10. In general, how healthy do you consider the following foods to be?*

# Moms were less likely to have canned, dried and fruit and vegetable juice, available in their homes this year compared to last year.



*Availability in the Home of Various Forms of Fruits and Vegetables*

***How available are fruit and vegetables in your home?***




= significantly higher than previous wave

= significantly lower than previous wave

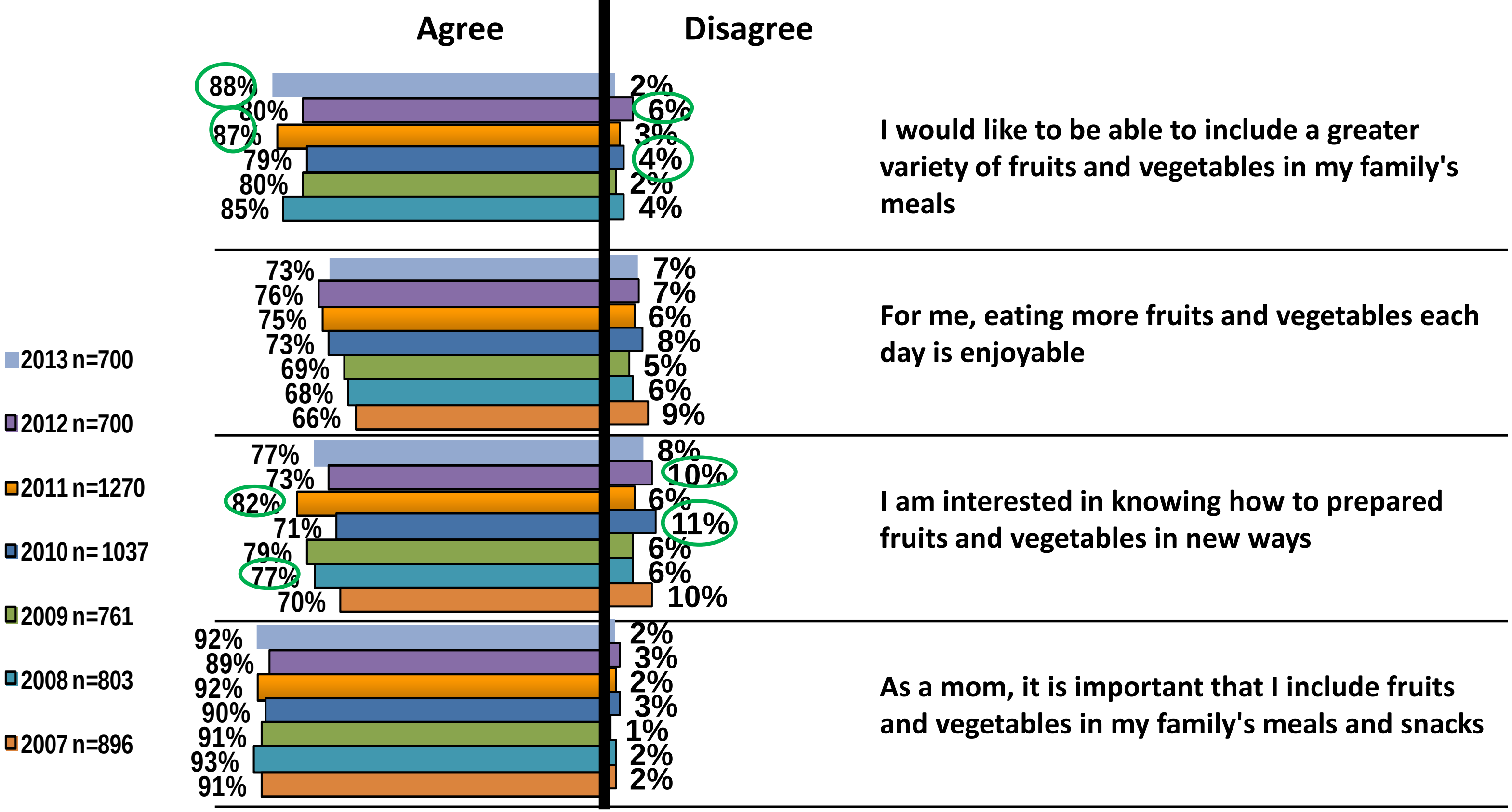
*Q11. Please rate the availability of fruit and vegetables in your home.*

# Moms were even more invested in fruits and vegetables this year…



*Attitudes toward Fruits and Vegetables*

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




| Net Score** by Moms with children 10 & under | |
|---|---|
| 2013 | 2012 |
| +86% | +74% |
| +66% | +69% |
| +69% | +63% |
| +90% | +86% |

= significantly higher than previous wave

= significantly lower than previous wave

% Respondents
*Please note percentages do not add to 100

*All Moms with children 10 & under*

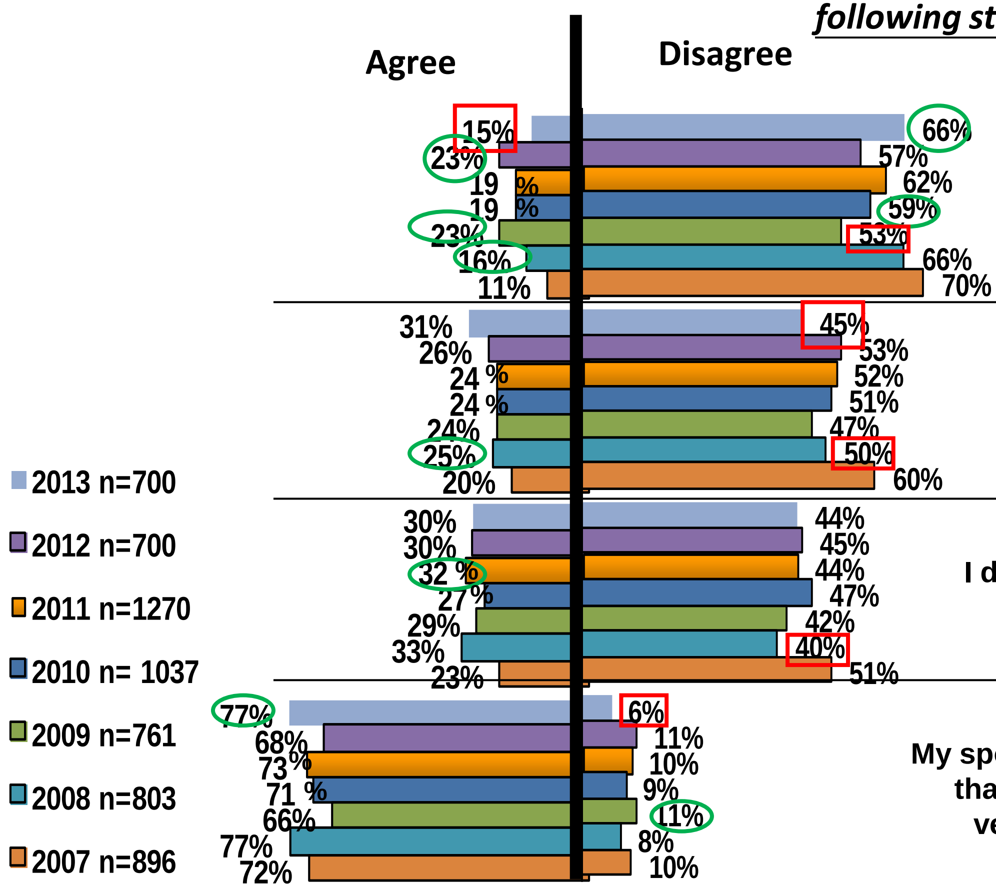
***Net score represents % respondents who agree with the given statement less those who disagree*

*Q12 Please rate your level of agreement or disagreement with the following statements.*

# …but were more likely to complain that they do not have the support they need. *[This would appear to be an economic issue since they not only find it less of a chore this year but also benefit from more support from their spouses.]*

*Attitudes toward Fruits and Vegetables*

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




*Please note percentages do not add to 100

| Net Score** by Moms with children 10 & under | |
|---|---|
| 2013 | 2012 |
| -51% | -34% |
| -14% | -27% |
| -14% | -15% |
| +71% | +57% |

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

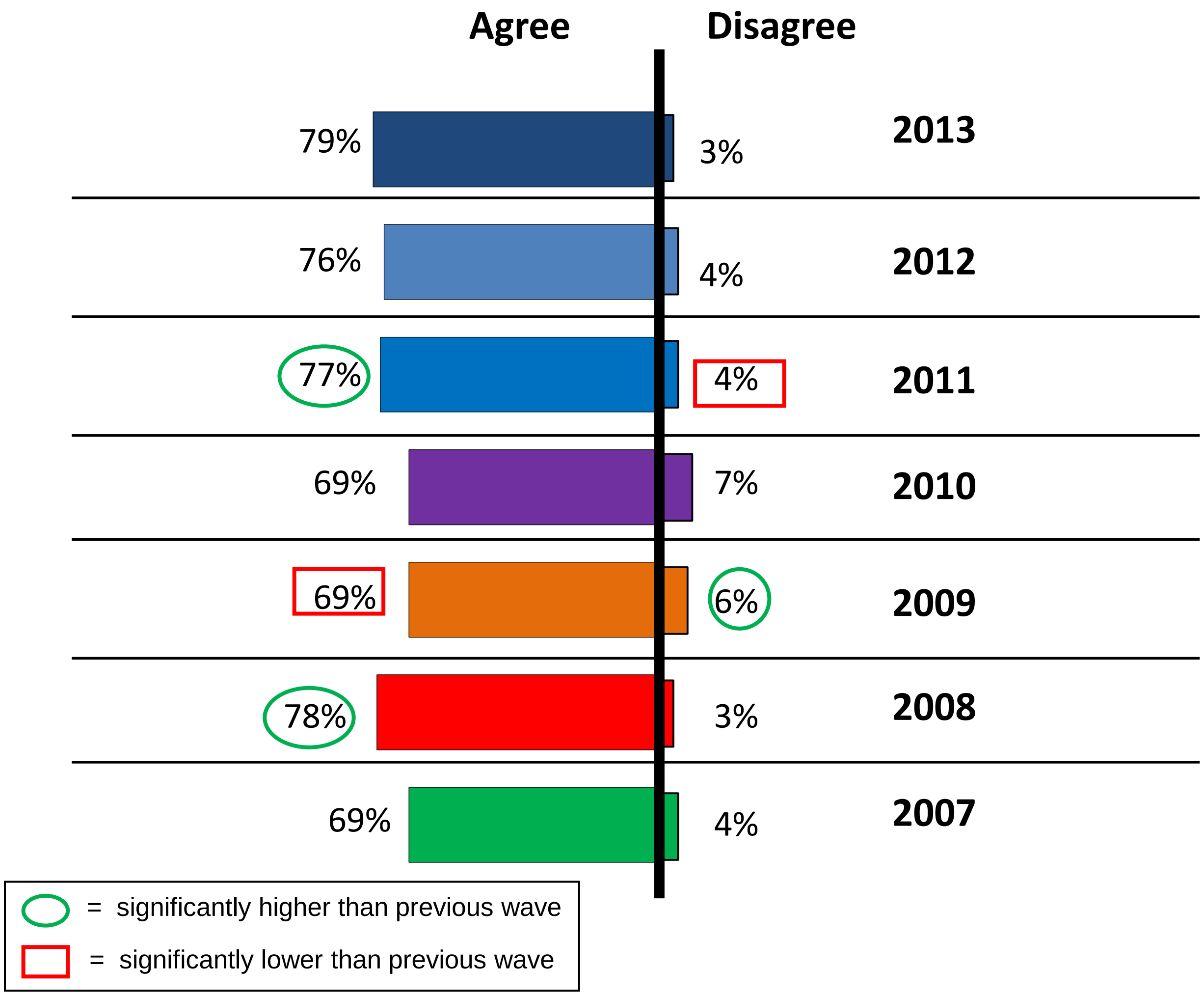
***Net score represents % respondents who agree with the given statement less those who disagree*

*Q12. Please rate your level of agreement or disagreement with the following statements.*

# The majority of moms intend to include more fruits and vegetables in family snacks and meals in the next 3 months



*Attitudes toward Fruits and Vegetables*




**In the next 3 months, I intend to include more fruits and vegetables in family's meals and snacks**

2013 n=700
2012 n=700
2011 n=1270
2010 n=1037
2009 n=761
2008 n=803
2007 n=896

Moms with kids 10 & under

*% Respondents*

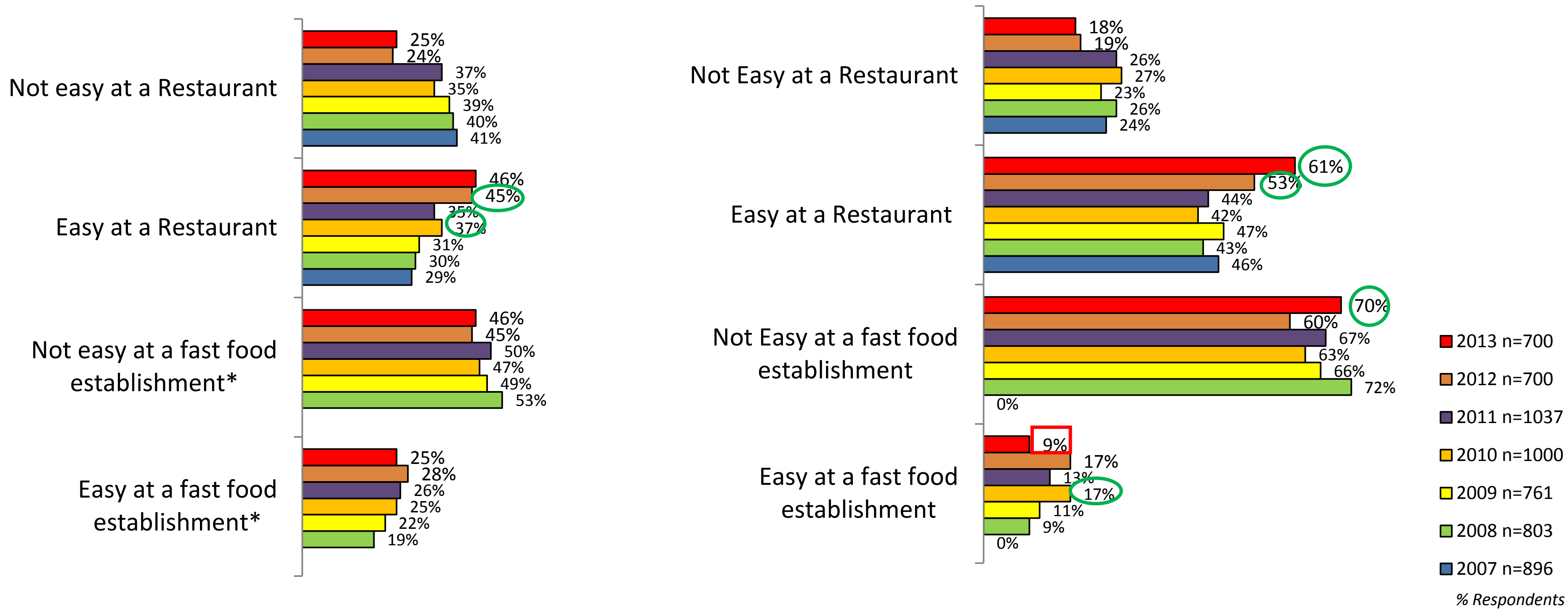
*Q12. Please rate your level of agreement or disagreement with the following statements:*

# There has been an increase in Moms who believe it is easy to get their families to eat fruits and vegetables when at a Restaurant

*Ease in Getting Families to Eat Fruits and Vegetables at a Restaurant and Fast Food Establishments*

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

**FRUITS** **VEGETABLES**




= significantly higher than previous wave

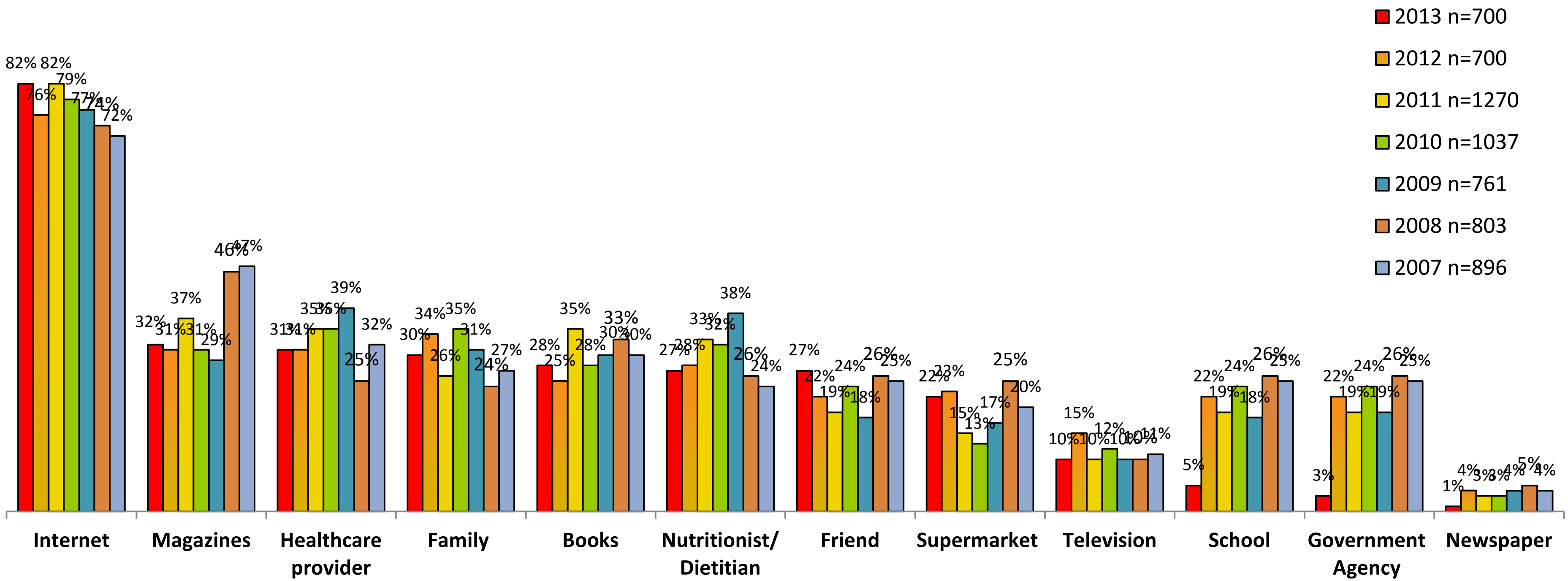
= significantly lower than previous wave

*Q13. How easy is it for you to get your family to eat VEGETABLES at the following times?*
*Q14. Please rate how easy it is to get your family to eat FRUIT at the following times?*

# This year, less Moms say they would consult their School, Government Agency and Television for information.



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




*Moms with children 10 and under*

*% Respondents*

*Q15. 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*

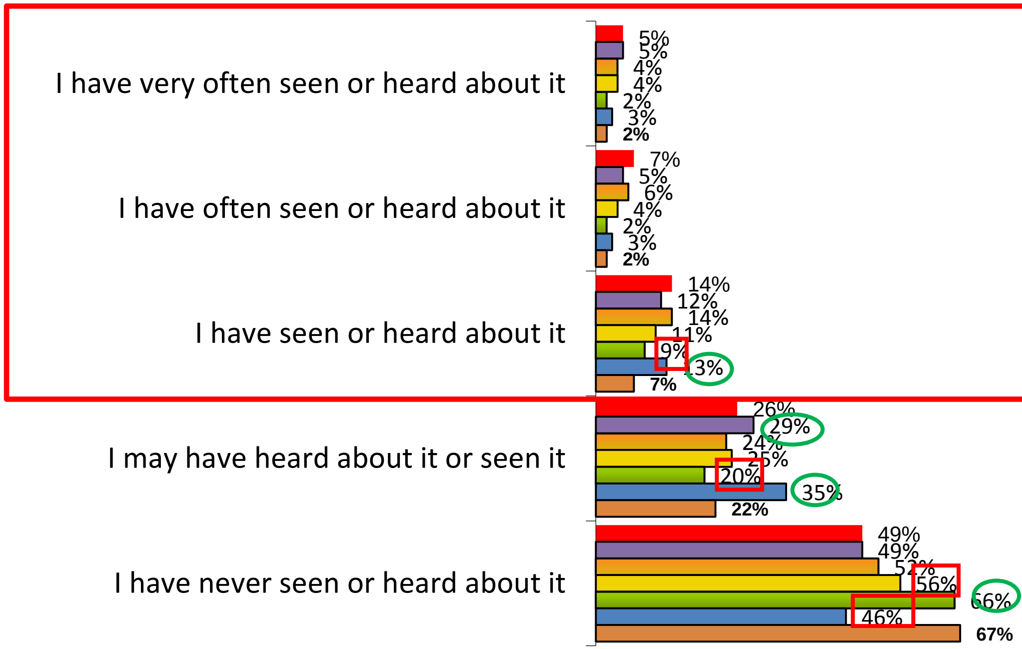
# Campaign Awareness & Impressions

Fruits & Veggies – More Matters

# Campaign awareness is at an all-time high: 26%.

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

**Moms with children 10 & under**




2013 n = 700
2012 n = 700
2011 n = 1270
2010 n = 1037
2009 n = 761
2008 n = 803
2007 n = 896

**Total "definite" awareness:**

| | |
|---|---|
| 26% (2013) | +4% |
| 22% (2012) | -2% |
| 24% (2011) | +8% |
| 19% (2010) | +6% |
| 13% (2009) | -6% |
| 19% (2008) | +8% |

*% Respondents*

*Q16. 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 were found for Moms and their familiarity with Fruits & Veggies – More Matters:

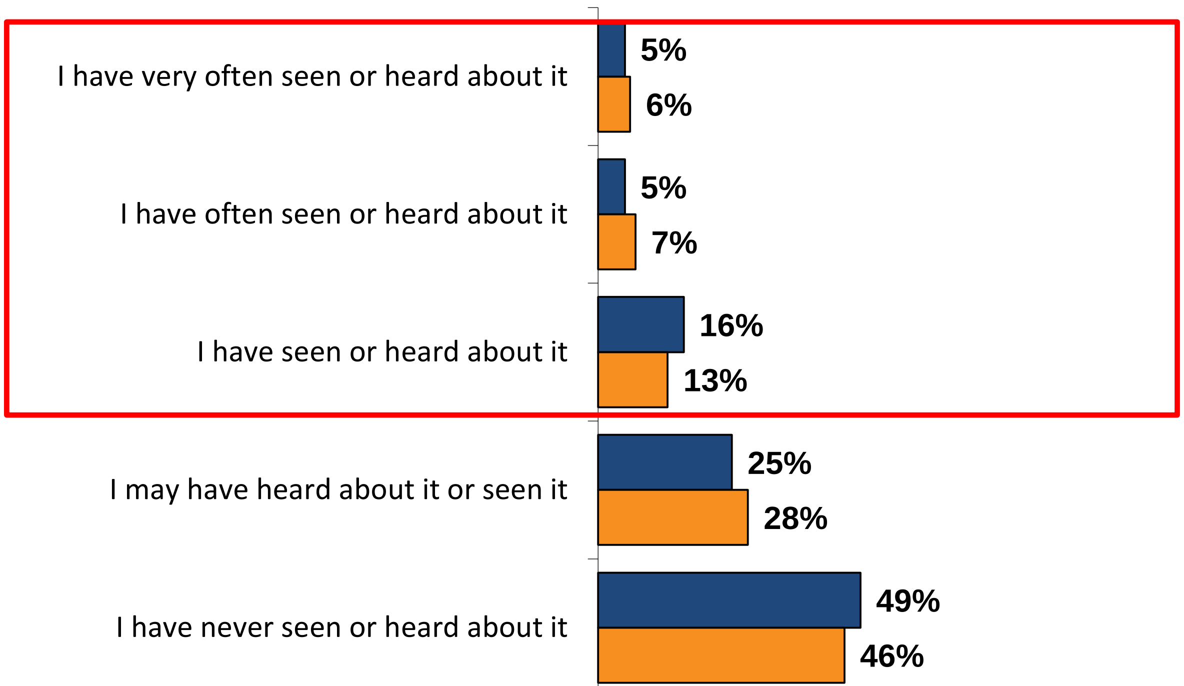
| Familiarity |
|---|
| **Less Educated vs. More Educated**<br>➢More Educated Moms are more likely to have maybe seen or heard about Fruits & Veggies – More Matters than Moms that are Less Educated (Less Educated: 20%/ More Educated: 30%)<br><br>**Region**<br>➢Moms from the North East are more likely to have never seen or heard about Fruits & Veggies – More Matters than Moms from the West (North East: 53%/ West: 42%)<br>➢ Moms from the West are more likely to have often seen or heard about Fruits & Veggies – More Matters than Moms from the North East ( North East: 3%/ West: 10%) |

*Q16. Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?*

# Moms from both generations are equally familiar with the campaign.



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




**Total "definite" awareness:**
Generation X: 26%
Generation Y: 26%

Generation X
Generation Y

= significantly lower than the other Generation

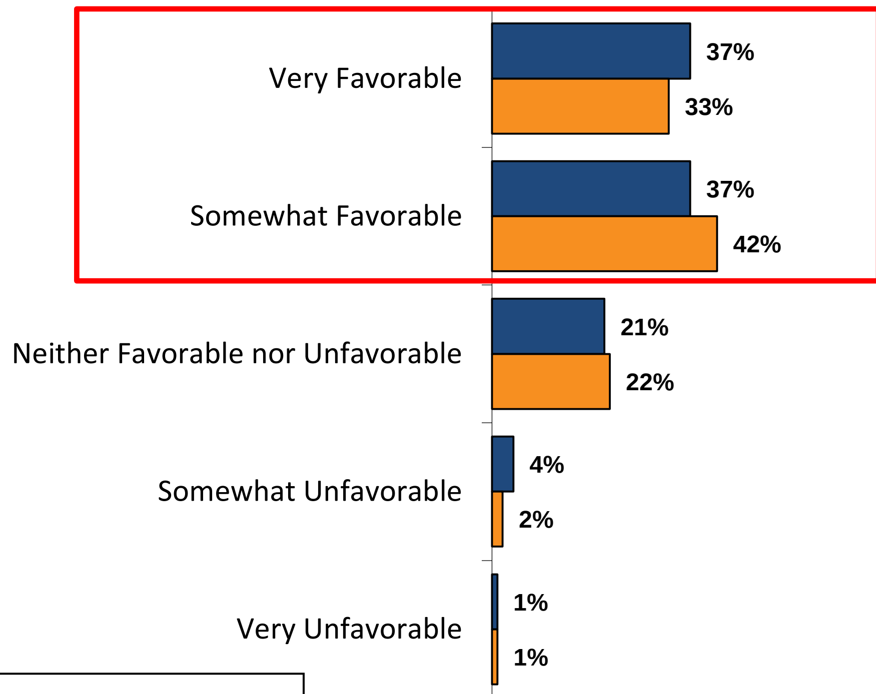
*Generation X n=350
*Generation Y n=350
*% Respondents*

*Q16. Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?*

# Moms from both generations have very favorable impressions of the campaign.

*Please rate your overall impression of Fruits & Veggies – More Matters.*

**Moms with children 10 & under**




**Total favorable:**
Generation X: 74%
Generation Y: 75%

Generation X
Generation Y

Generation X n=168
Generation Y n=174
*% Respondents*

= significantly lower than the other Generation

*Q17. Taking everything into account from what you may have seen, read, heard or experienced, please rate your overall impression of Fruits & Veggies-More Matters.*

# Impression of Fruits & Veggies – More Matters



The following statistically significant differences were found for Moms and their overall impression with Fruits & Veggies – More Matters:

| Favorability |
|---|
| **Region**<br>➢Moms from the South and West are more likely to have a 'very favorable' impression of Fruits & Veggies – More Matters than Moms from the North East (North East: 22%/ South: 39%/ West: 40%)<br>➢ Moms from the North East are more likely to have a 'somewhat favorable' impression of Fruits & Veggies – More Matters than moms from the Mid West (North East: 49% / Mid West: 34%) |

*Q17. Taking everything into account from what you may have seen, read, heard or experienced, please rate your overall impression of Fruits & Veggies-More Matters.*

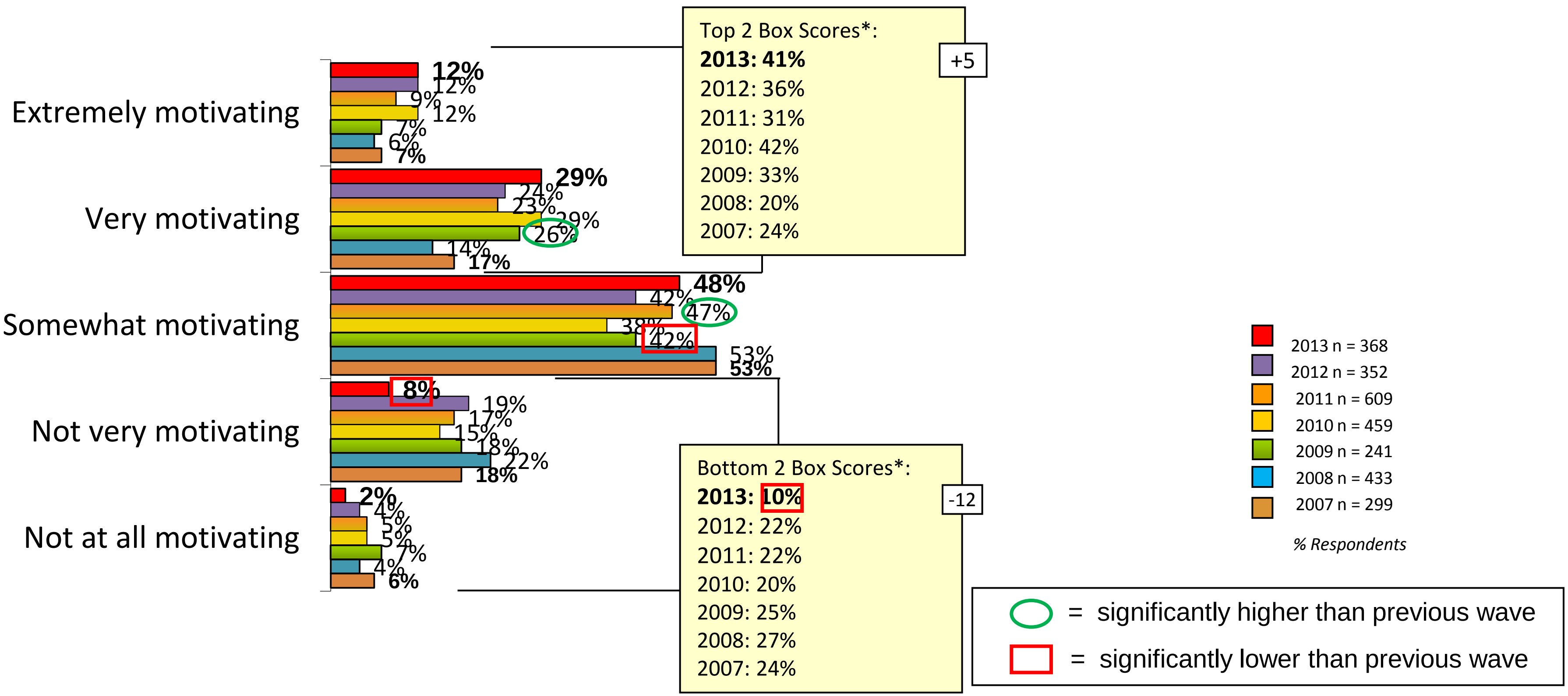
# The campaign's motivational appeal continued to improve: two in five (41%) moms who have been exposed to the campaign find it motivating and only one in ten do not find it motivating.



*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)*

**Moms with children 10 and under**



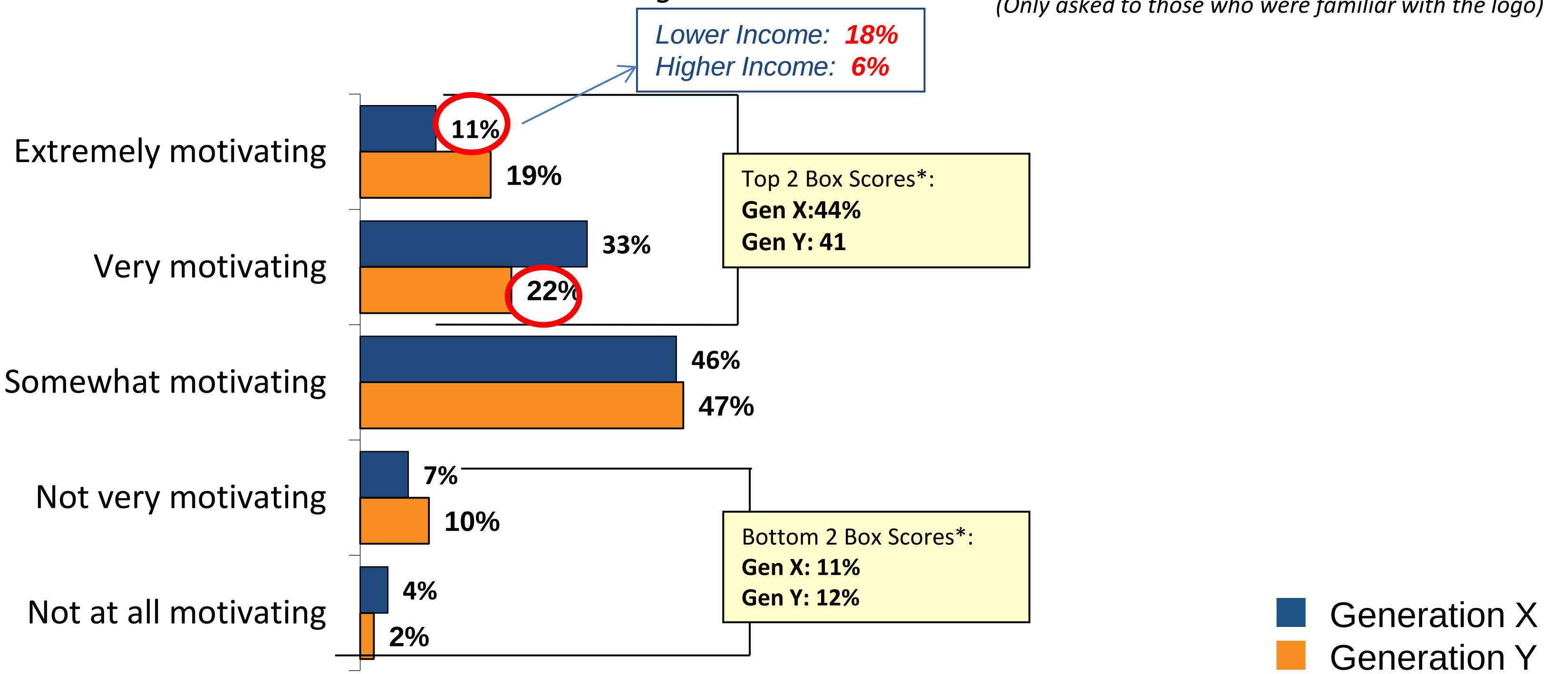

**Top 2 box score reflects the total score of respondents who answered 1or 2*

*Q20. How well do you believe Fruits & Veggies—More Matters™ motivates you to help yourself and/or your family to eat more fruits and vegetables?*

# The campaign is particularly appealing to lower income moms.

*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)*




◯ = significantly lower than the other Generation

Generation X = 178
Generation Y = 190
*% Respondents*

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

*Q20. How well do you believe Fruits & Veggies—More Matters™ motivates you to help yourself and/or your family to eat more fruits and vegetables?*

# How Motivating is Fruits & Veggies – More Matters

The following statistically significant differences were found for Moms and how motivated they feel regarding Fruits & Veggies – More Matters:

**Motivation with Fruits & Veggies – More Matters**

**Low Income vs. High Income**

- Low Income Moms are more likely to find Fruits & Veggies – More Matters 'extremely motivating' in comparison with Moms that have High Incomes (Low Income: 20% / High Income: 9%)
- High Income Moms are more likely to find Fruits & Veggies – More Matters 'very motivating' in comparison with Moms that have Low Incomes (Low Income: 22%/ High Income: 31%)

**Less Educated vs. More Educated**

- More Educated Moms are more likely to find Fruits & Veggies – More Matters 'not very motivating' in comparison with Moms that are Less Educated (Less Educated: 5% / More Educated: 11%)

**Region**

- Moms from the Mid West are more likely to find Fruits & Veggies – More Matters 'not very motivating' in comparison with Moms that are from the South. (Mid West: 14% / South: 4%)

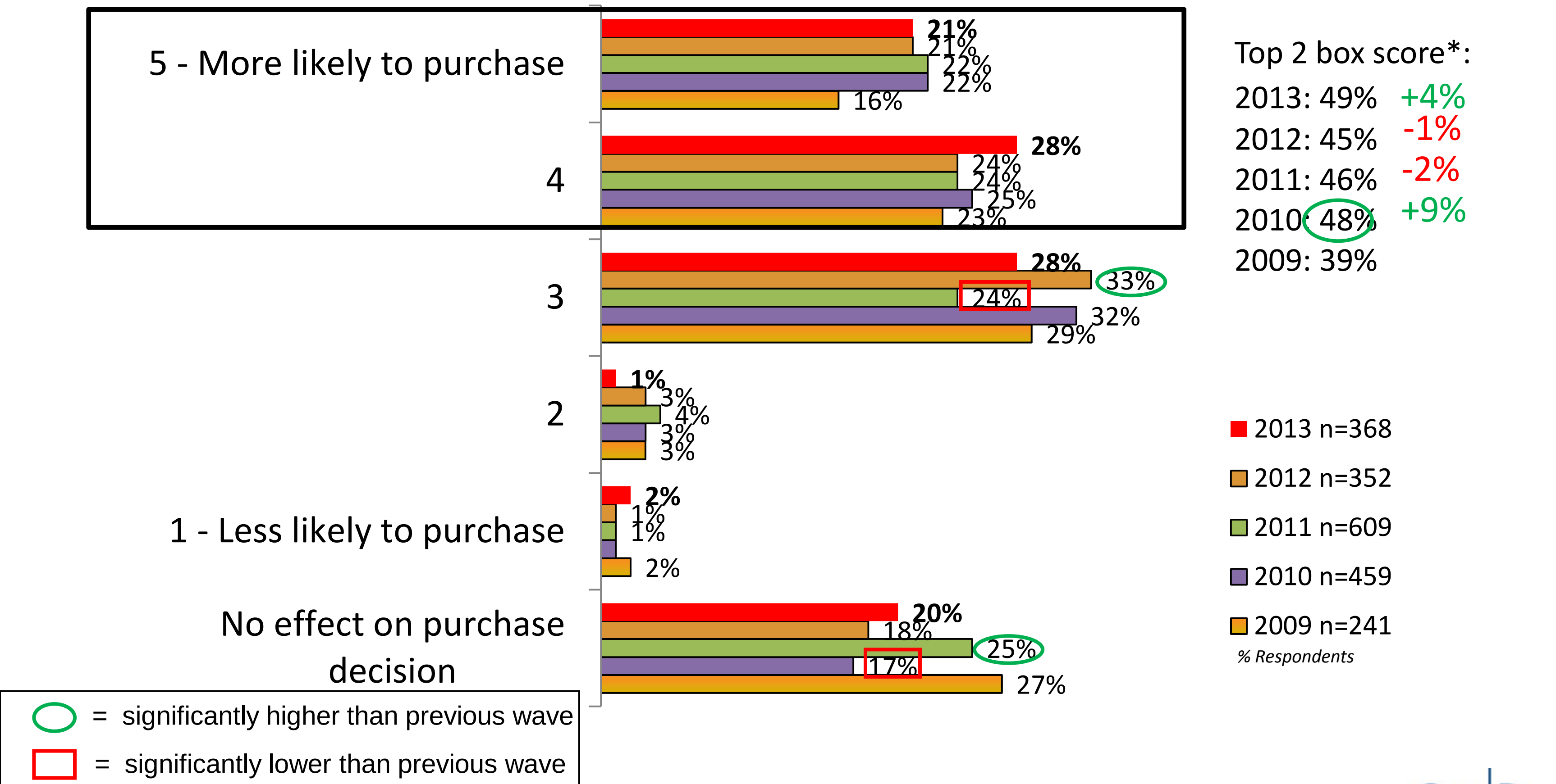
*Q20. How well do you believe Fruits & Veggies—More Matters™ motivates you to help yourself and/or your family to eat more fruits and vegetables?*

# The campaign remained an important driver of purchase.



*Logo Purchase Influence*

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



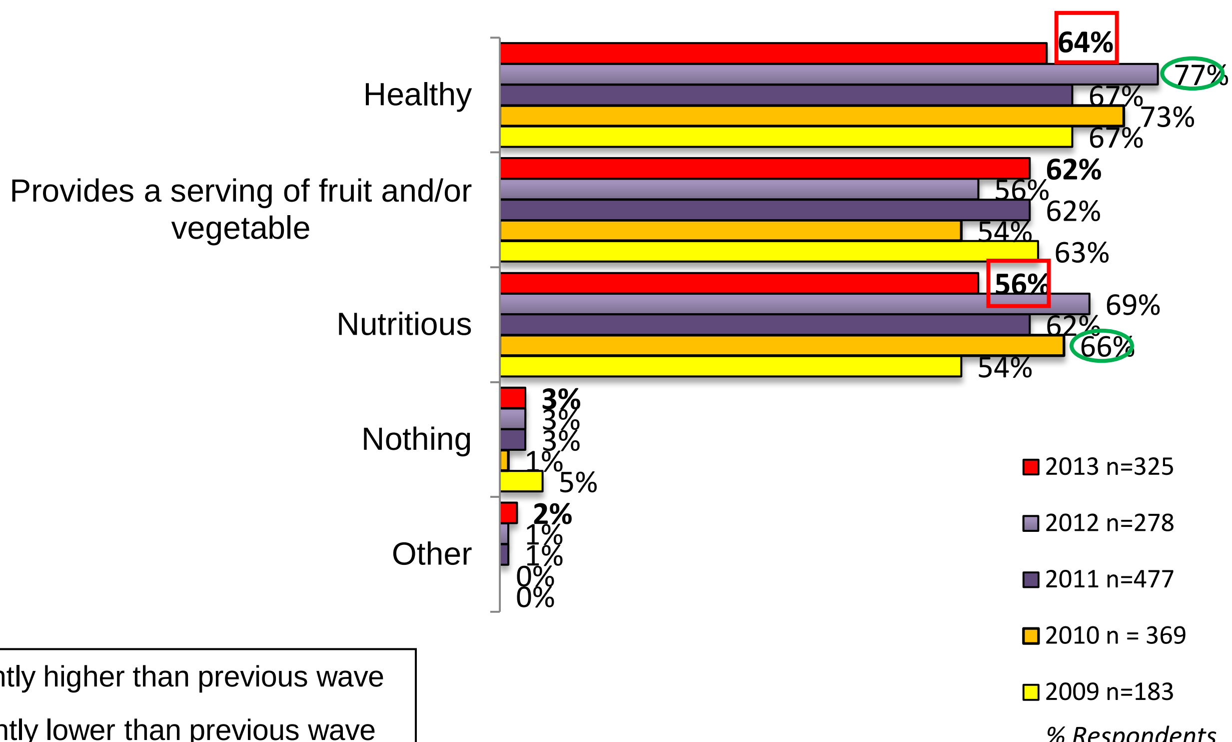

Q22 . How does seeing the "Fruits & Veggies - More Matters" logo affect your decision to purchase the product?

# Moms were less likely this year, however, to associate the campaign with "healthy" or "nutritious".

Logo Brand Association

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

**Moms with children 10 & under**




= significantly higher than previous wave

= significantly lower than previous wave

*Q21. If you see the More Matters™ **logo** on a product, what does it say to you about the product?*

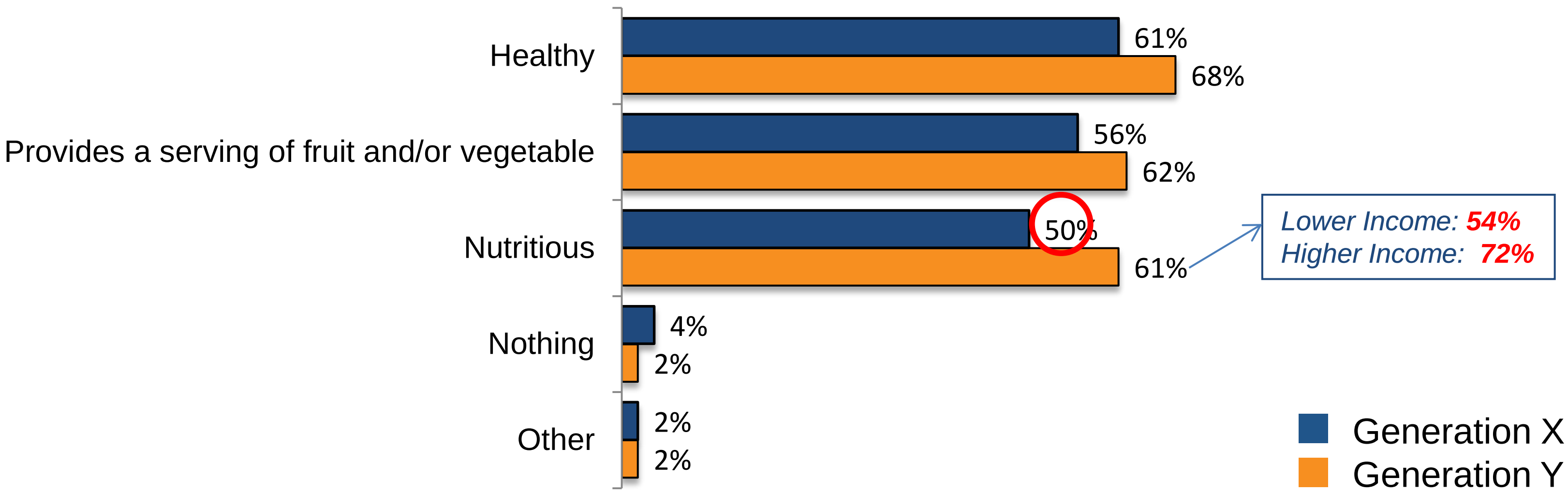
# Gen X moms are less likely to associate the campaign with “nutritious” than their Gen Y counterparts.



Logo Brand Association

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

**Moms with children 10 & under**




= significantly lower than the other Generation

Generation X n= 158
Generation Y n=167
% Respondents

*Q21. 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 Mom groups:

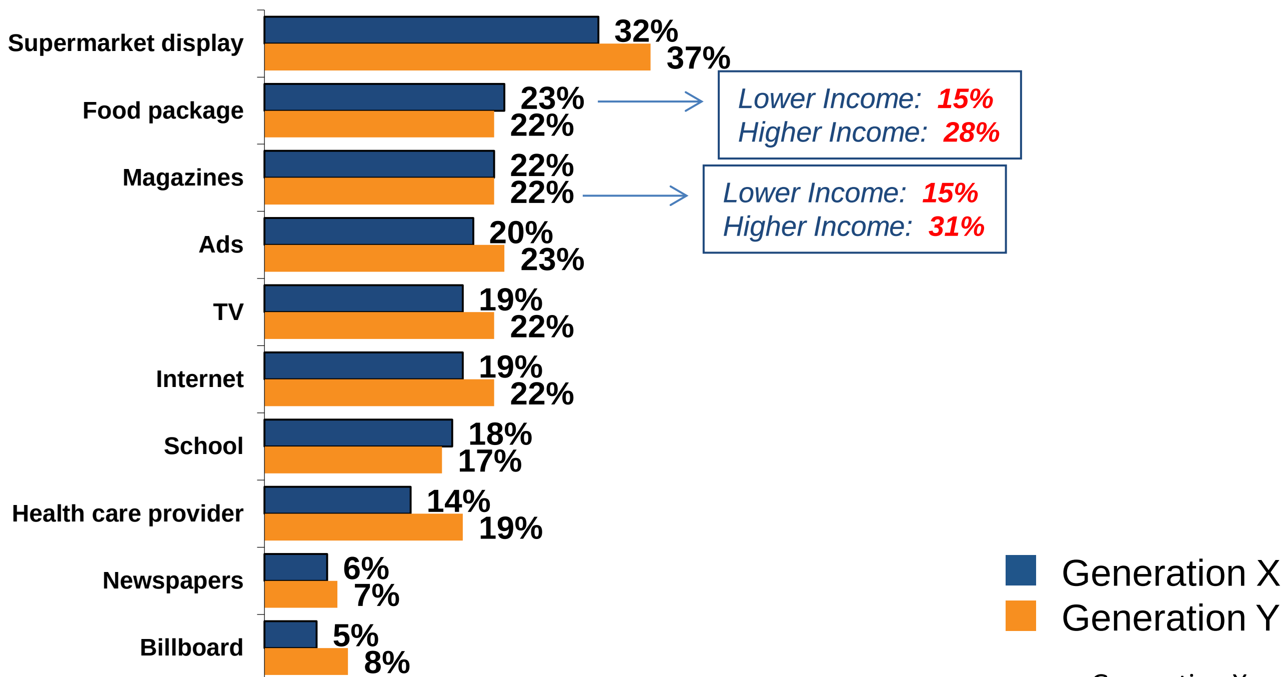
| Association with More Matters Logo |
| --- |
| **<u>Less Educated vs. More Educated</u>**<br>➢ Less Educated Moms are more likely to find Fruits & Veggies – More Matters ‘healthy’ in comparison with Moms that are More Educated (Less Educated: 77% / More Educated: 57%) |

# Moms believe that the campaign is widespread and that they are exposed to it in many different media…



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

**Primary Channels**




Generation X n=178
Generation Y n=190
*% Respondents*

*Q18: Where did you see or hear of Fruits & Veggies—More Matters™? (Please select all that apply)*

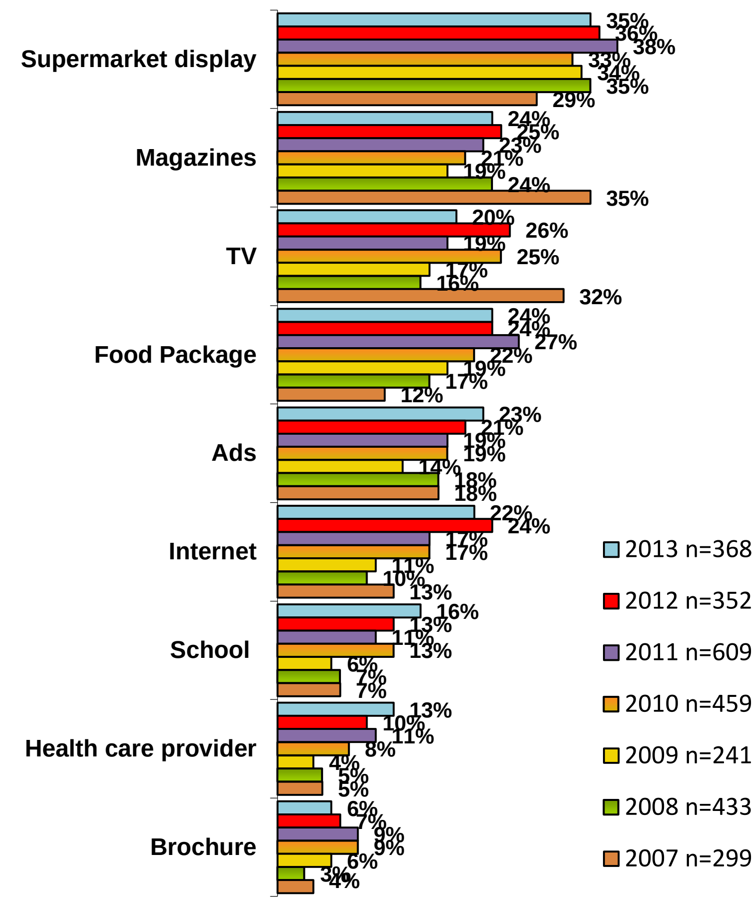
# … a consistent trend over time.

*How did you become familiar with the logo?*

**Moms with children 10 & under**

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

## Primary Channels




= significantly higher than previous wave

= significantly lower than previous wave

*% Respondents*

*Q18: Where did you see or hear of Fruits & Veggies—More Matters™? (Please select all that apply)*

# How Moms became familiar with Fruits & Veggies – More Matters



The following statistically significant differences were found for Moms and how they became familiar with Fruits & Veggies – More Matters:

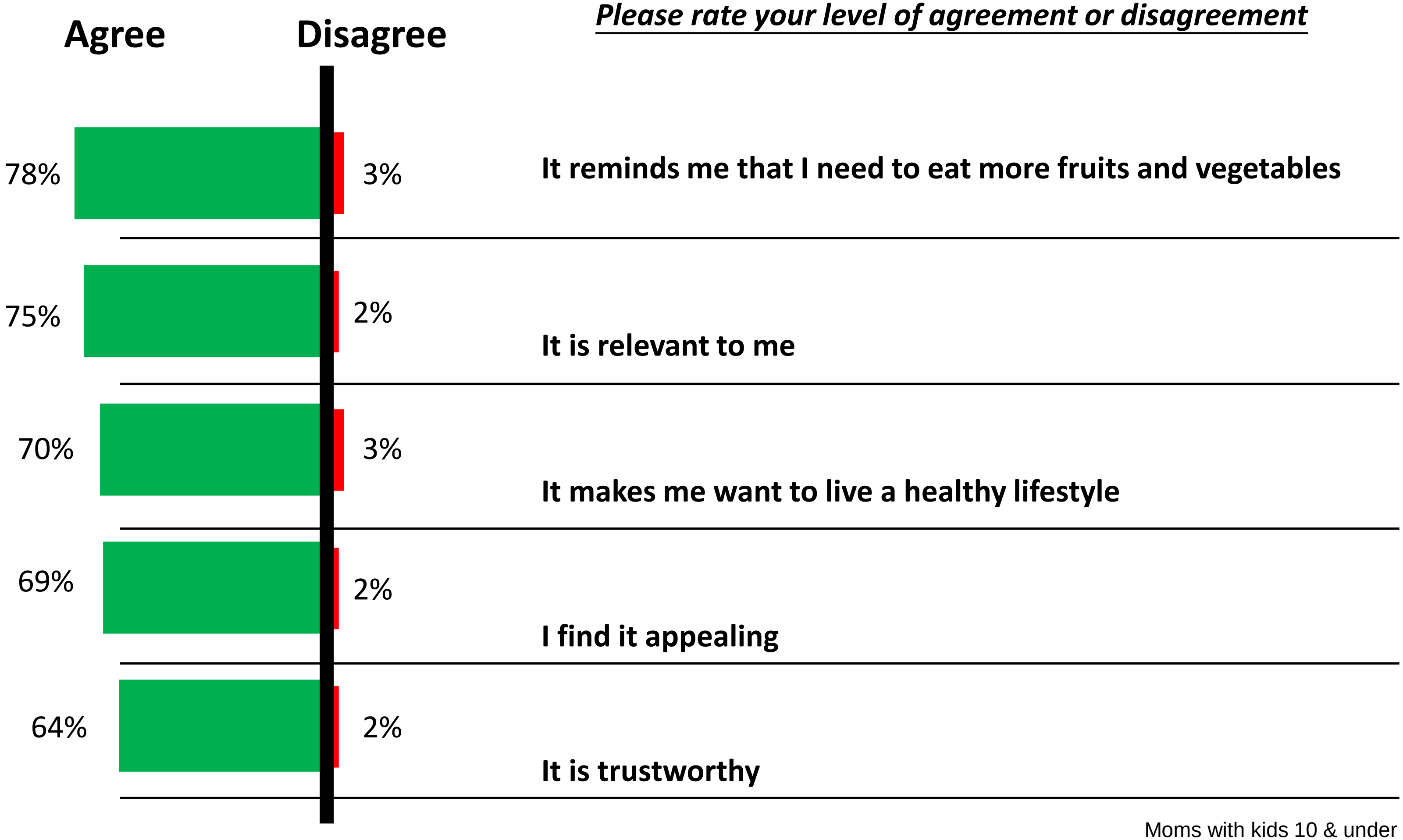
| How they became Familiar with Fruits & Veggies – More Matters |
|---|
| **Region**<br>➢ **Food Package**<br>- Moms from the North East and Mid West are more likely to have heard of Fruits & Veggies – More Matters through a Food Package than moms from the West (North East: 28%/ Mid West: 26%/ West: 15%)<br><br>**Less Educated vs. More Educated**<br>➢ **School**<br>- Less Educated Moms are more likely to have heard of Fruits & Veggies - More Matters through School than Moms that are More Educated (Less Educated: 25% / More Educated: 14%)<br><br>**Low Income vs. High Income**<br>➢ **Health Care Provider**<br>- Low Income Moms are more likely to have heard of Fruits & Veggies – More Matters through their Health Care Provider than Moms that have a High Income (Low Income: 22% / High Income: 12%) |

*Q18: Where did you see or hear of Fruits & Veggies—More Matters™? (Please select all that apply)*

## Moms particularly appreciate the campaign as a reminder to eat more fruits and vegetables and to live a healthy lifestyle.  It is also perceived to be relevant.



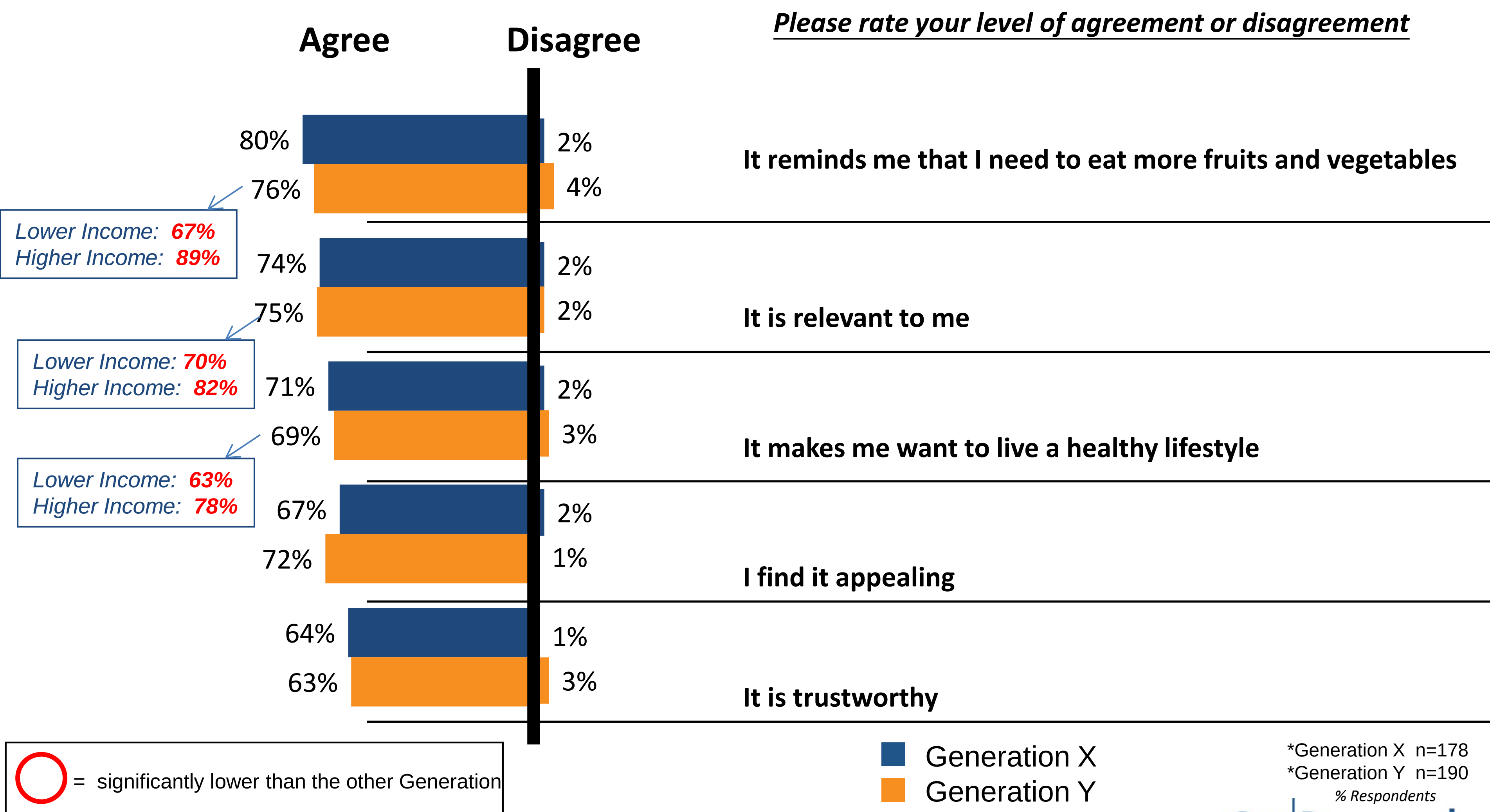
***Please rate your level of agreement or disagreement***




Moms with kids 10 & under
n=368
*% Respondents*

Q19. Please rate your level of agreement or disagreement with the following statements regarding Fruits & Veggies- More Matters:

# Moms from both generations perceived the campaign as a reminder to eat more fruits and vegetables




*Generation X n=178
*Generation Y n=190
*% Respondents*

*Q19. Please rate your level of agreement or disagreement with the following statements regarding Fruits & Veggies- More Matters:*

# Opinion regarding Fruits & Veggies – More Matters

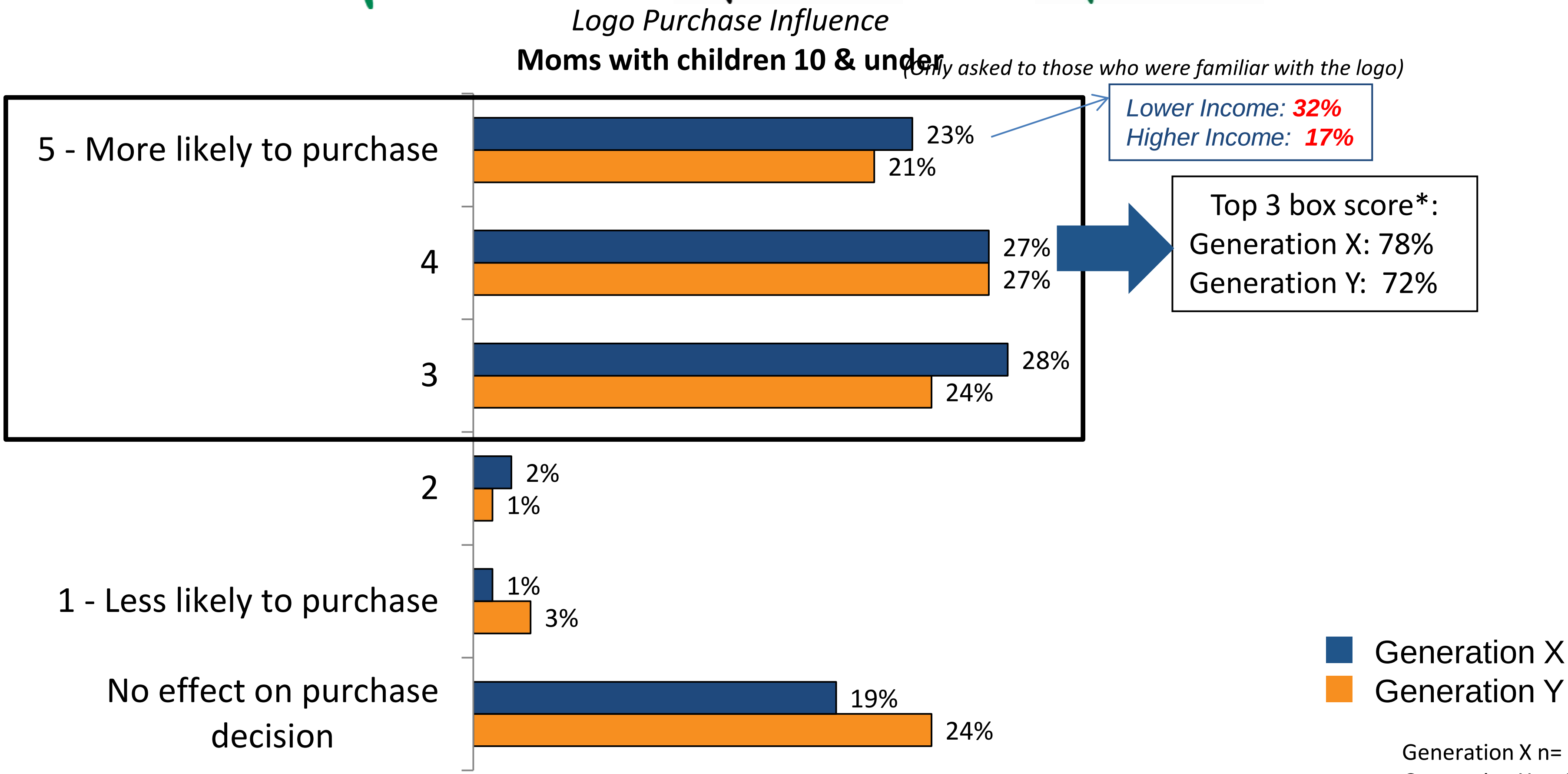
The following statistically significant differences were found for Moms and how they feel about Fruits & Veggies – More Matters:

| Agree | Disagree |
|---|---|
| **It reminds me that I need to eat more fruits and vegetables**<br>➢ **Low Income vs. High Income**<br>- High Income Moms are more likely to be reminded to eat more fruits and vegetables with regards to Fruits & Veggies – More Matters than those moms that have a Low Income (Low Income: 70% / High Income 86%)<br><br>**It makes me want to live a healthy lifestyle**<br>➢ **Region**<br>- Moms from the West are more likely to want to live a healthy lifestyle with regards to Fruits & Veggies – More Matters than Moms from the Mid West (Mid West: 63% / West: 77%) | **It reminds me that I need to eat more fruits and vegetables**<br>➢ **Less Educated vs. More Educated**<br>- Less Educated moms are more likely to not be reminded to eat more fruits and vegetables with regards to Fruits & Veggies – More Matters than More Educated Moms (Less Educated: 6% / More Educated: 1%) |

*Q19. Please rate your level of agreement or disagreement with the following statements regarding Fruits & Veggies- More Matters:*

# Moms from Generation X are more likely to purchase the product based on the logo in comparison with Moms from Generation Y






Generation X n= 178
Generation Y n=190
% Respondents

Q22 . How does seeing the "Fruits & Veggies - More Matters" logo 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 Moms with regards to the likelihood of purchasing a product with the More Matters logo:

| Likelihood of purchase with More Matters Logo |
|---|
| **Low Income vs. High Income**<br>➢ High Income Moms are more likely to give a '3' in likelihood of purchase in comparison with Moms that have a High Income (Low Income: 21% / High Income: 31%)<br><br>**Less Educated vs. More Educated**<br>➢ More Educated Moms are more likely to give a '4' in likelihood of purchase in comparison with Moms that are Less Educated (Less Educated: 18%/ More Educated: 31%)<br>➢ Less Educated Moms are more likely to give a '5' in likelihood of purchase in comparison with Moms that are More educated (Less Educated: 30% / More Educated: 18%)<br><br>**Region**<br>➢ Moms from the West are more likely to give a '4' in likelihood of purchase in comparison with Moms that are from the North East (North East: 20% /. West: 33%) |

*Q22 . How does seeing the "Fruits & Veggies - More Matters" logo affect your decision to purchase the product?*

# Campaign Awareness & Impressions

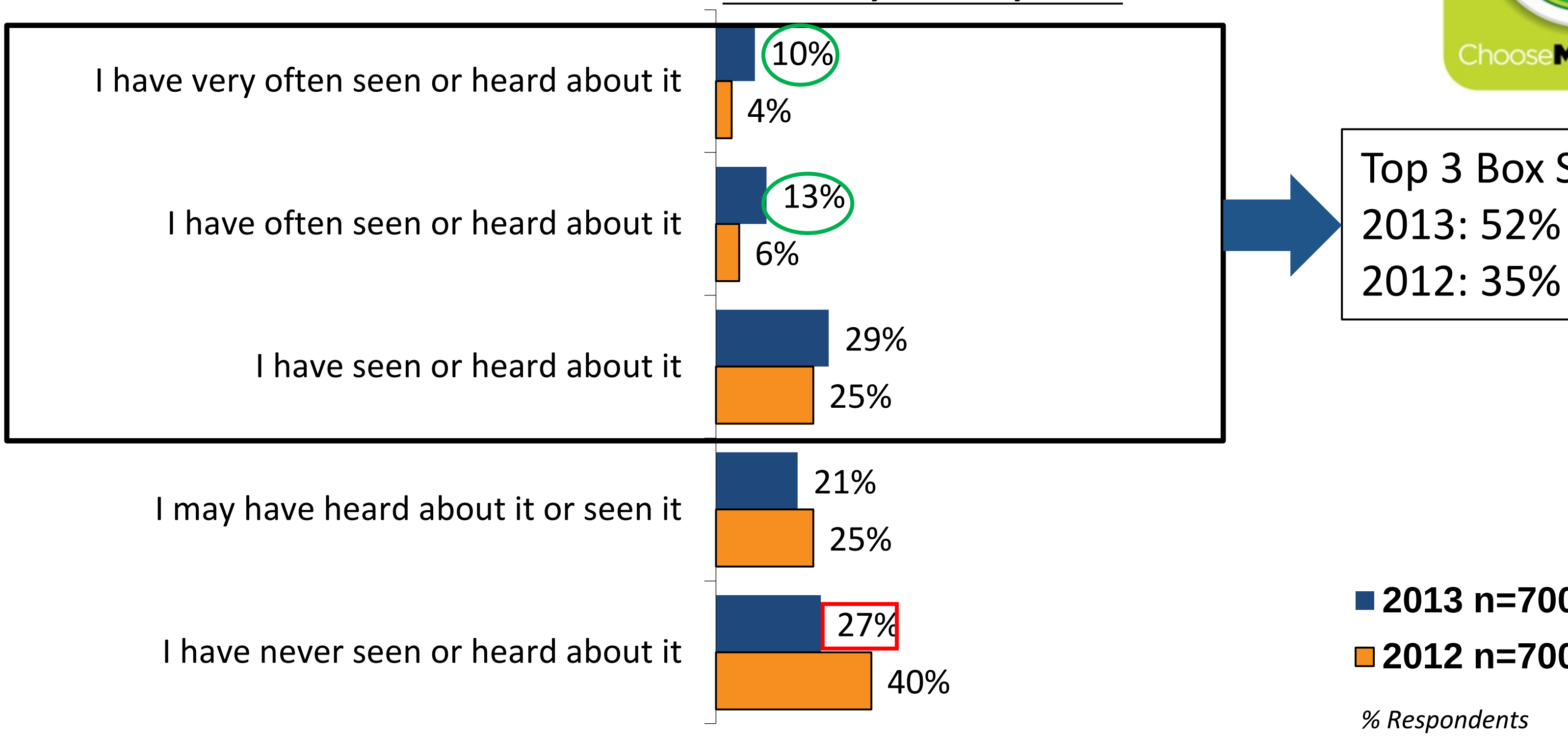
MyPlate

# Familiarity increased significantly compared to last year.



## Moms with children 10 & under

**Familiarity with 'My Plate'**



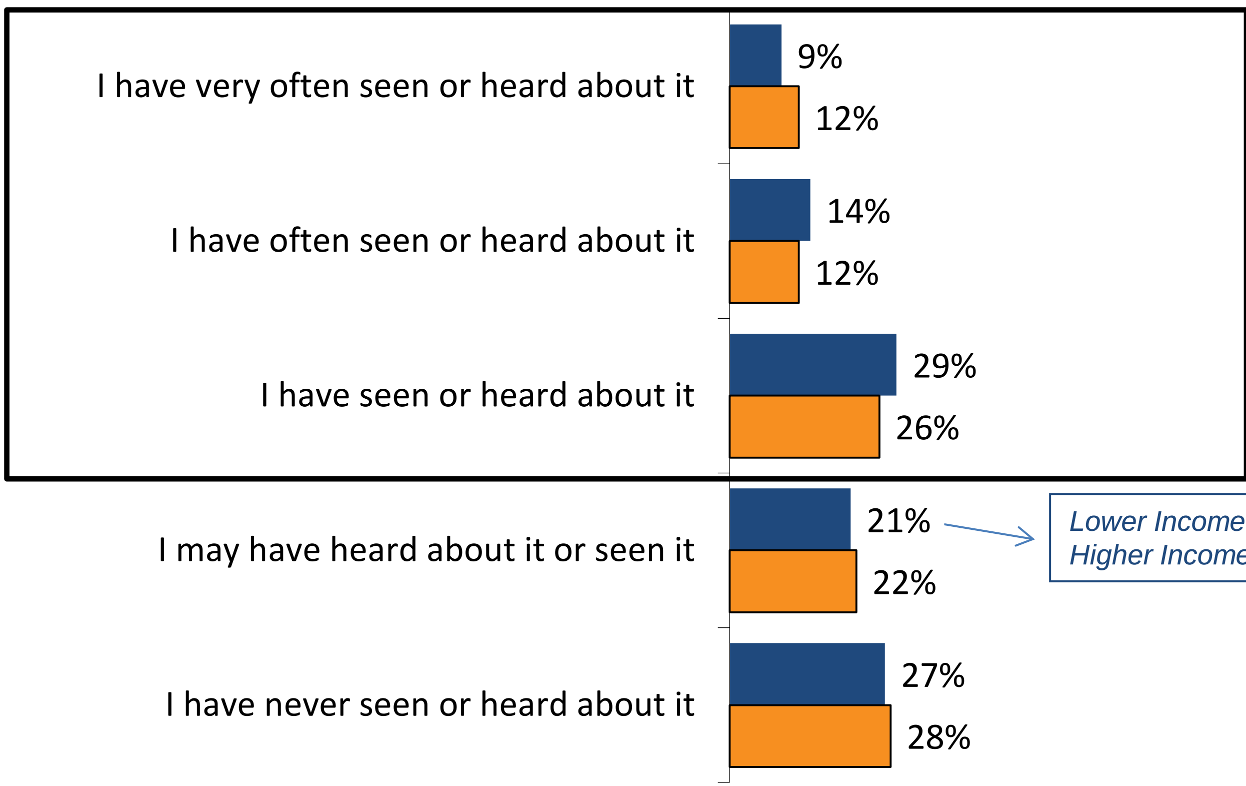

Top 3 Box Score
2013: 52% +17%
2012: 35%

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

*Q 25. Which of the following statements best describes your level of familiarity with 'MyPlate'?*

# Familiarity did not differ significantly by generation.

**Familiarity with 'My Plate'**




*Lower Income: 27%*
*Higher Income: 17%*

**Top 3 Box Score**
Generation X: 52%
Generation Y: 50%

Generation X
Generation Y

*Generation X n=350
*Generation Y n=350
*% Respondents*

= significantly lower than the other Generation

*Q 25. 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 Moms:

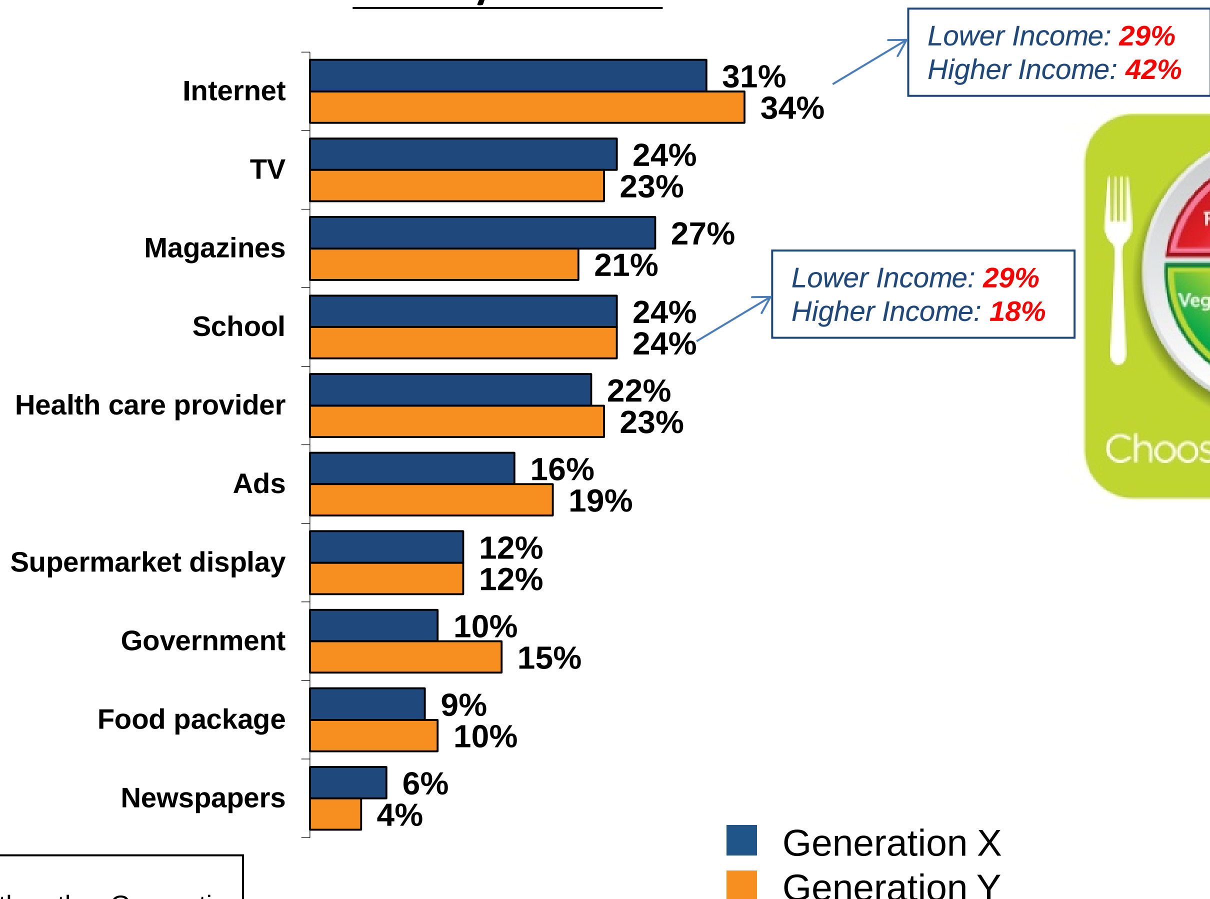
| Familiarity with MyPlate |
| --- |
| **Region**<br>➢ Moms from the North East are more likely to be familiar with MyPlate in comparison with Moms from the South (North East: 17% / South: 8%) |

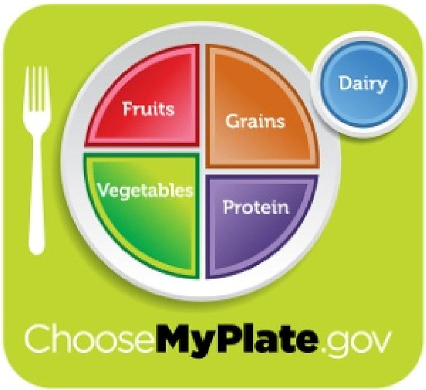
*Q 25. Which of the following statements best describes your level of familiarity with 'MyPlate'?*

# As in the PBH campaign, moms believe that the MyPlate campaign is widespread and that they are exposed to it in many different media.



## Primary Channels




Generation X n= 256
Generation Y n=252
*% Respondents*

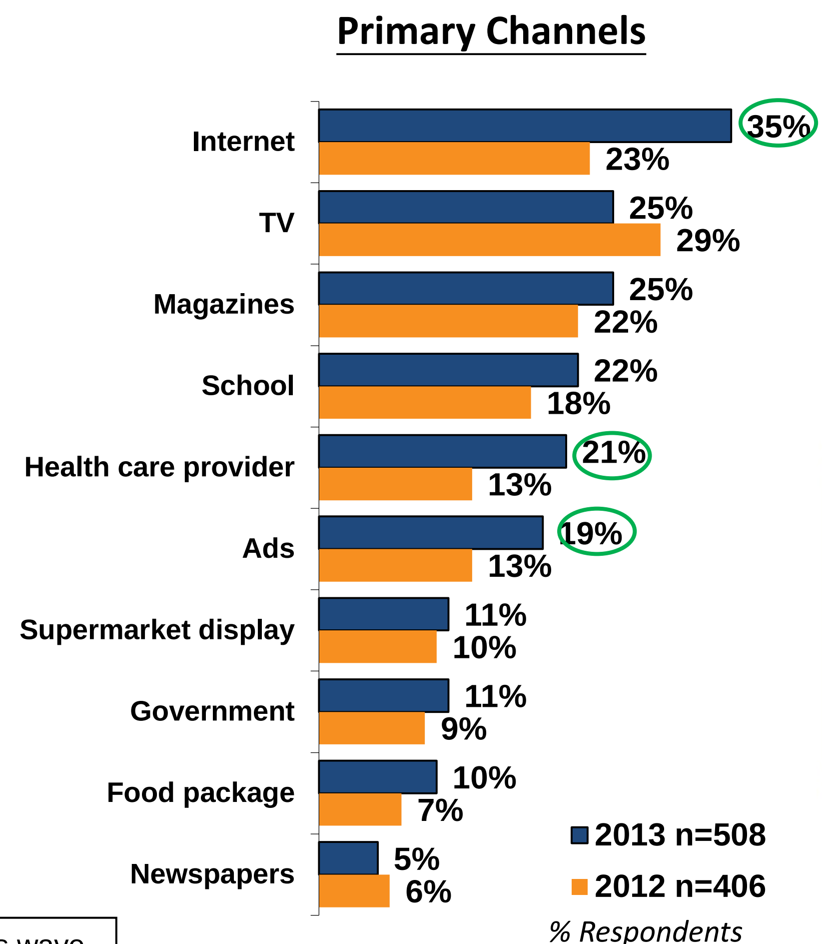
= significantly lower than the other Generation

*Q26. Where did you see or hear of 'MyPlate'? (Please select all that apply)*

# Moms were more likely to believe they had been exposed to the campaign on the Internet, at a healthcare provider and via ads.



*Where did you see or hear of MyPlate?*





= significantly higher than previous wave

= significantly lower than previous wave

Q26. 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 Moms with regards to where they see or hear about MyPlate:

## How Moms became familiar with MyPlate

**Low Income vs. High Income**

- High Income Moms are more likely to have heard or seen of MyPlate from the 'Internet' in comparison with Low Income Moms (Low Income: 27% / High Income: 38%)
- Low Income Moms are more likely to have heard or seen of MyPlate from the 'Government' in comparison with High Income Moms (Low Income: 16% / High Income: 9%)

**Less Educated vs. More Educated**

- Less Educated Moms are more likely to have heard or seen of MyPlate from 'School' in comparison with More Educated Moms (Less Educated: 32% / More Educated: 20%)
- Less Educated Moms are more likely to have heard or seen of MyPlate from 'Supermarket Display' in comparison with Moms that are more Educated (Less Educated: 17%/ More Educated: 10%)
- Less Educated Moms are more likely to have heard or seen of MyPlate from 'Food Package" in comparison with Moms that are More Educated (Less Educated: 14% / More Educated: 7%)
- More Educated Moms are more likely to have seen or heard of MyPlate from "Newspapers' in comparison with Moms that are Less Educated (Less Educated: 2% / More Educated: 6%)

**Region**

- Moms from the Mid West are more likely to have heard or seen of MyPlate from 'School' in comparison with Moms from the West (Mid West: 32% / West: 19%)
- Moms from the South are more likely to have heard or seen of MyPlate from 'TV' in comparison with Moms from the North East, Mid West and West (North East: 21% / Mid West: 21% / South: 34% / West: 21%)
- Moms from the North East are more likely to have heard or seen of MyPlate from 'Ads' in comparison with Moms from the South and West (North East: 26%/ South: 14% / West: 10%)
- Moms from the Mid West are more likely to have heard or seen of MyPlate from 'Ads' in comparison with Moms from the West (Mid West: 20% / West: 10%)
- Moms from the North East, Mid West and South are more likely to have heard or seen of MyPlate from "Food Packages' in comparison with Moms from the West ( North East: 12% / Mid West: 11% / South: 12% / West: 4%)

*Q26: Where did you see or hear about MyPlate?*

# Appendix - Demographics

# Respondent Profile



| | 2013 | | 2012 | | 2011 | | 2010 | | 2009 | 2008 | 2007 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **MARITAL STATUS** | Gen X % | Gen Y % | Gen X % | Gen Y% | Gen X % | Gen Y % | Gen X % | Gen Y % | % | % | % |
| Married/Living with someone | 76% | 70% | 83% | 71% | 90% | 81% | 90% | 68% | 92% | 87% | 87% |
| Single | 12% | 26% | 9% | 24% | 4% | 15% | 4% | 29% | 3% | 5% | 5% |
| Separated/Divorced | 11% | 3% | 8% | 4% | 6% | 3% | 5% | 4% | 5% | 8% | 8% |
| Widowed | 1% | 1% | - | - | <1% | <1% | <1% | -- | <1% | <1% | <1% |
| **SPOUSE'S EDUCATION** | % | % | % | % | % | % | % | % | % | % | % |
| Did not finish high school | 4% | 5% | 4% | 4% | 1% | 5% | 2% | 6% | 2% | 2% | 1% |
| High school graduate | 18% | 21% | 21% | 32% | 16% | 21% | 16% | 27% | 16% | 10% | 11% |
| Some college | 19% | 28% | 23% | 33% | 19% | 30% | 20% | 29% | 25% | 24% | 23% |
| College graduate | 31% | 29% | 30% | 23% | 37% | 31% | 36% | 26% | 31% | 35% | 37% |
| Some graduate work | 7% | 5% | 2% | 1% | 4% | 2% | 3% | 3% | 4% | 6% | 4% |
| Completed graduate work | 19% | 10% | 17% | 6% | 19% | 7% | 20% | 7% | 19% | 20% | 20% |
| Trade/vocational school | 2% | 2% | 3% | 1% | 3% | 3% | 3% | 3% | 3% | 4% | 4% |
| **WORK OUTSIDE THE HOME** | % | % | % | % | % | % | % | % | % | % | % |
| No | 33% | 39% | 44% | 54% | 48% | 58% | 43% | 57% | 38% | 29% | 31% |
| Yes, Part-time | 25% | 23% | 21% | 17% | 21% | 15% | 22% | 19% | 22% | 21% | 21% |
| Yes, Full-time | 42% | 38% | 35% | 25% | 31% | 26% | 35% | 24% | 41% | 50% | 48% |

| | 2013 | | 2012 | | 2011 | | 2010 | | 2009 | 2008 | 2007 | 2006 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **ETHNICITY** | Gen X % | Gen Y % | Gen X % | Gen Y % | Gen X % | Gen Y % | Gen X % | Gen Y % | % | % | % | % |
| White/Caucasian | 69% | 66% | 79% | 71% | 83% | 76% | 82% | 65% | 84% | 84% | 83% | 81% |
| Black/African American | 12% | 12% | 8% | 6% | 6% | 9% | 5% | 12% | 4% | 4% | 5% | 7% |
| Hispanic/Latino | 11% | 16% | 5% | 9% | 5% | 7% | 7% | 14% | 5% | 4% | 4% | 6% |
| Asian/Pacific Islander | 5% | 4% | 7% | 7% | 6% | 7% | 5% | 6% | 6% | 6% | 6% | 5% |
| Other | 3% | 2% | 1% | 6% | 1% | 2% | 1% | 2% | 1% | 2% | 2% | 2% |

# Respondent Profile

| | 2013 | | 2012 | | 2011 | | 2010 | | 2009 | 2008 | 2007 | 2006 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **GENDER** | **Gen X %** | **Gen Y %** | **Gen X %** | **Gen Y %** | **Gen X %** | **Gen Y %** | **Gen X %** | **Gen Y %** | **%** | **%** | **%** | **%** |
| Female | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Male | - | - | - | - | - | - | - | - | - | - | - | - |

| AGE | % | % | % | % | % | % | % | % | % | % | % | % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 20-23 | 0% | 0% | NA | 44% | NA | 18% | NA | 26% | NA | NA | NA | NA |
| 24 - 29 | 0% | 33% | - | 56% | NA | 63% | NA | 74% | <1% | 3% | 12% | 16% |
| 30 - 34 | 16% | 67% | 62% | - | 24% | 19% | 31% | NA | 31% | 27% | 35% | 35% |
| 35 - 41 | 63% | - | 15% | | 53% | NA | 51% | NA | 55% | 71% | 54% | 49% |
| 42-44 | 21% | - | | | 24% | NA | 18% | NA | 13% | NA | NA | NA |

| HHI | % | % | % | % | % | % | % | % | % | % | % | % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Less than $25K | 17% | 33% | 9% | 21% | 4% | 16% | 4% | 30% | 4% | 4% | 3% | 2% |
| $25K - $50K | 22% | 28% | 25% | 40% | 9% | 43% | 12% | 39% | 12% | 12% | 14% | 20% |
| $50K - $75K | 19% | 17% | 28% | 26% | 21% | 24% | 22% | 19% | 22% | 22% | 22% | 26% |
| $75K - $100K | 12% | 10% | 17% | 8% | 27% | 9% | 25% | 8% | 25% | 25% | 26% | 22% |
| $100K - $150K | 30% | 12% | 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% | 2% | 1% | 1% | 1% | 4% | 1% | 4% | 1% | <1% | 1% | <1% |
| High school graduate | 9% | 12% | 17% | 27% | 12% | 15% | 12% | 25% | 16% | 6% | 7% | 5% |
| Some college | 21% | 27% | 28% | 36% | 24% | 39% | 25% | 41% | 25% | 23% | 20% | 25% |
| College graduate | 40% | 37% | 34% | 23% | 38% | 30% | 37% | 19% | 36% | 41% | 43% | 41% |
| Some graduate work | 7% | 5% | 4% | 4% | 6% | 4% | 5% | 3% | 5% | 6% | 7% | 8% |
| Completed graduate work | 20% | 13% | 13% | 6% | 18% | 7% | 17% | 6% | 15% | 22% | 20% | 17% |
| Trade/vocational school | 2% | 3% | 4% | 2% | 3% | 1% | 3% | 3% | 3% | 3% | 3% | 3% |

| | 2013 | 2012 | 2011 |
|---|---|---|---|
| **Mean Age of Children** | **Yrs.** | **Yrs** | **Yrs.** |
| Gen X | 8 | 9 | 8 |
| Gen Y | 4 | 4 | 4 |

# Respondent Profile



| | 2013 | 2012 |
|---|---|---|
| MARITAL STATUS | Moms with children 10 & under | Moms with children 10 & under |
| Married/Living with someone | 73% | 73% |
| Single | 19% | 13% |
| Separated/Divorced | 7% | 11% |
| Widowed | 1% | 3% |

| SPOUSE'S EDUCATION | % | % |
|---|---|---|
| Did not finish high school | 4% | 5% |
| High school graduate | 19% | 28% |
| Some college | 24% | 26% |
| College graduate | 30% | 36% |
| Some graduate work | 6% | 2% |
| Completed graduate work | 15% | 11% |
| Trade/vocational school | 2% | 3% |

| WORK OUTSIDE THE HOME | % | % |
|---|---|---|
| No | 36% | 53% |
| Yes, Part-time | 24% | 19% |
| Yes, Full-time | 40% | 28% |

| ETHNICITY | % | % |
|---|---|---|
| White/Caucasian | 68% | 78% |
| Black/African American | 12% | 8% |
| Hispanic/Latino | 12% | 6% |
| Asian/Pacific Islander | 5% | 5% |
| Mixed Race | 2% | 2% |
| Other | 1% | 1% |

| | 2013 | 2012 |
|---|---|---|
| | Moms with children 10 & under | Moms with children 10 & under |
| GENDER | % | % |
| Female | 100% | 100% |
| Male | n/a | n/a |

| AGE | % | % |
|---|---|---|
| 18-24 | 1% | 17% |
| 25-34 | 50% | 25% |
| 35-44 | 41% | 27% |
| 45-44 | 8% | 21% |
| 55+ | - | 11% |

| HHI | % | % |
|---|---|---|
| Less than $25K | 25% | 16% |
| $25K - $49,999K | 25% | 31% |
| $50K - $74,999K | 18% | 26% |
| $75K - $99,999K | 11% | 14% |
| $100K –or more | 21% | 13% |

| OWN EDUCATION | % | % |
|---|---|---|
| Did not finish high school | 2% | 1% |
| High school graduate | 11% | 23% |
| Some college | 24% | 33% |
| College graduate | 39% | 27% |
| Some graduate work | 6% | 4% |
| Completed graduate work | 16% | 8% |
| Trade/vocational school | 2% | 3% |

# Geographic Profile

| NORTHEAST ATLANTIC | 13 X % | 13 Y % | 12 X % | 12 Y % | 11 X % | 11 Y % | 10 X % | 10 Y % | 09 % | 08 % | 07 % | 06 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Connecticut | 2% | 1% | 1% | <1% | 1% | 1% | 2% | 1% | <1% | 2% | 1% | 1% |
| Maine | <1% | 1% | 2% | <1% | 1% | 1% | <1% | <1% | <1% | <1% | <1% | 1% |
| Massachusetts | 3% | 2% | 2% | 1% | 2% | 1% | 2% | 1% | 4% | 2% | 3% | 2% |
| New Hampshire | 1% | 1% | 1% | <1% | 1% | 1% | 1% | 1% | 1% | <1% | <1% | <1% |
| Rhode Island | <1% | 1% | - | 1% | <1% | <1% | 1% | -- | <1% | <1% | <1% | <1% |
| Vermont | - | - | 1% | - | 0% | <1% | <1% | -- | <1% | <1% | <1% | -- |

| MIDDLE ATLANTIC | 13 X % | 13 Y % | 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% | 1% |
| Maryland | 3% | 1% | 2% | 2% | 1% | 2% | 1% | 2% | 2% | 2% | 1% | 2% |
| New Jersey | 4% | 3% | 6% | 2% | 6% | 3% | 5% | 1% | 3% | 3% | 3% | 3% |
| New York | 9% | 7% | 8% | 6% | 7% | 5% | 8% | 4% | 6% | 5% | 5% | 5% |
| Pennsylvania | 7 | 7% | 6% | 5% | 4% | 4% | 5% | 5% | 6% | 5% | 5% | 4% |
| Washington | 2 | 3% | 2% | 2% | 2% | 3% | 2% | 1% | 2% | 1% | 2% | 3% |

| SOUTHWEST | 13 X % | 13 Y % | 12 X % | 12 Y % | 11 X % | 11 Y % | 10 X % | 10 Y % | 09 % | 08 % | 07 % | 06 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Arizona | 1% | 2% | 3% | 2% | 1% | 1% | 2% | 2% | 2% | 2% | 1% | 2% |
| New México | - | 1% | - | <1% | <1% | 0% | <1% | <1% | <1% | <1% | <1% | <1% |
| Oklahoma | 1% | <1% | 2% | <1% | 1% | 2% | 1% | -- | 1% | 1% | 1% | 1% |
| Texas | 2% | 4% | 6% | 8% | 7% | 7% | 6% | 9% | 8% | 10% | 10% | 11% |

| WEST | 13 X % | 13 Y % | 12 X % | 12 Y % | 11 X % | 11 Y % | 10 X % | 10 Y % | 09 % | 08 % | 07 % | 06 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Alaska | - | <1% | - | - | <1% | 0% | <1% | 1% | 0% | <1% | <1% | <1% |
| California | 15% | 11% | 7% | 9% | 9% | 8% | 9% | 14% | 10% | 9% | 8% | 7% |
| Colorado | 2% | 3% | 3% | 2% | 1% | 2% | 2% | <1% | 3% | 2% | 2% | 1% |
| Hawaii | 2% | 2% | - | - | 0% | 0% | <1% | 1% | <1% | 1% | 1% | <1% |
| Idaho | 2% | 1% | 1% | <1% | <1% | 1% | 1% | <1% | <1% | 1% | 1% | 1% |
| Montana | 1% | 1% | - | - | <1% | 0% | <1% | -- | <1% | <1% | <1% | <1% |
| Nevada | 2% | 1% | <1% | 2% | 1% | 0% | <1% | 1% | <1% | 1% | <1% | 1% |
| Oregon | 2% | 2% | 1% | 1% | 2% | 1% | 2% | 1% | 2% | 1% | 1% | 1% |
| Utah | 1% | 2% | 1% | <1% | 1% | 3% | 1% | 1% | 1% | 1% | <1% | 1% |
| Wyoming | <1% | <1% | 1% | <1% | <1% | 1% | <1% | 1% | <1% | 0% | 0% | 0% |

*% Respondents*

# Geographic Profile

| MIDWEST | 13 X % | 13 Y % | 12 X % | 12 Y % | 11 X % | 11 Y % | 10 X % | 10 Y % | 09 % | 08 % | 07 % | 06 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Illinois | 3% | 7% | 5% | 6% | 5% | 5% | 5% | 3% | 7% | 5% | 4% | 6% |
| Indiana | 3% | 3% | 2% | 3% | 3% | 3% | 4% | 2% | 3% | 2% | 2% | 2% |
| Iowa | 1% | 1% | 2% | <1% | 1% | <1% | 1% | 1% | 1% | 2% | 1% | 2% |
| Kansas | 1% | 2% | <1% | 2% | 1% | 1% | 1% | 1% | 1% | 1% | 1% | <1% |
| Michigan | 4% | 3% | 1% | 2% | 4% | 3% | 3% | 2% | 4% | 7% | 8% | 5% |
| Minnesota | 2% | 4% | 1% | 1% | 2% | 3% | 2% | 2% | 2% | 5% | 6% | 5% |
| Missouri | 1% | 1% | 3% | 4% | 2% | 4% | 2% | 2% | 2% | 2% | 3% | 1% |
| Nebraska | 1% | - | 1% | 4% | 1% | 1% | <1% | 1% | 1% | 1% | 1% | 1% |
| North Dakota | 1% | 1% | - | <1% | 0% | 0% | <1% | <1% | <1% | <1% | 1% | 1% |
| Ohio | 4% | 5% | 4% | 5% | 6% | 6% | 6% | 3% | 5% | 4% | 4% | 4% |
| South Dakota | <1% | - | 1% | <1% | 0% | <1% | <1% | <1% | <1% | <1% | 0% | <1% |
| Wisconsin | 1% | 4% | 3% | 1% | 3% | 4% | 1% | 3% | 4% | 4% | 3% | 4% |

| SOUTH | 13 X % | 13 Y % | 12 X % | 12 Y % | 11 X % | 11 Y % | 10 X % | 10 Y % | 09 % | 08 % | 07 % | 06 % |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Alabama | 1% | 1% | 1% | 1% | 2% | 1% | 1% | 2% | <1% | 1% | 1% | 1% |
| Arkansas | 1% | - | 1% | 1% | <1% | 0% | 1% | 1% | 1% | 1% | 1% | 1% |
| Florida | 5% | 3% | 5% | 3% | 5% | 5% | 5⅜ | 6% | 3% | 5% | 4% | 5% |
| Georgia | 2% | 3% | 4% | 6% | 4% | 4% | 2⅜ | 5% | 1% | 3% | 3% | 4% |
| Kentucky | 1% | - | 1% | <1% | 1% | 1% | 1% | 1% | 1% | 2% | 1% | 1% |
| Louisiana | 1% | 1% | 1% | 1% | 1% | 1% | 1% | 1% | 1% | 1% | 1% | 1% |
| Mississippi | <1% | - | <1% | <1% | 1% | 1% | 1% | 2% | <1% | <1% | 1% | <1% |
| North Carolina | 1% | 2% | 5% | 2% | 4% | 3% | 4% | 4% | 3% | 3% | 3% | 2% |
| South Carolina | <1% | 1% | 1% | 2% | 1% | 1% | 1% | 2% | 1% | 1% | 2% | 1% |
| Tennessee | 2% | 1% | 2% | 2% | 2% | 2% | 1% | 2% | 2% | 2% | 2% | 2% |
| Virginia | 2% | 1% | 2% | 1% | 4% | 3% | 3% | 4% | 3% | 2% | 3% | 2% |
| West Virginia | <1% | 1% | - | 1% | 1% | <1% | 1% | <1% | 1% | 0% | 0% | 0% |

*% Respondents*

# Geographic Profile



| NORTH EAST ATLANTIC | 2013 Moms with children 10 & under % | 2012 Moms with children 10 & under % |
|---|---|---|
| Connecticut | 2% | 1% |
| Maine | 1% | 1% |
| Massachusetts | 3% | 2% |
| New Hampshire | 1% | <1% |
| Rhode Island | 1% | <1% |
| Vermont | - | <1% |

| MIDDLE ATLANTIC | Moms with children 10 & under % | Moms with children 10 & under % |
|---|---|---|
| Delaware | <1% | 1% |
| Maryland | 2% | 1% |
| New Jersey | 4% | 4% |
| New York | 8% | 7% |
| Pennsylvania | 7% | 6% |
| Washington | 3% | 2% |

| MIDWEST | Moms with children 10 & under % | Moms with kis 10 & under % |
|---|---|---|
| Illinois | 5% | 5% |
| Indiana | 3% | 3% |
| Iowa | 1% | 1% |
| Kansas | 1% | 2% |
| Michigan | 4% | 3% |
| Minnesota | 3% | 2% |
| Missouri | 1% | 3% |
| Nebraska | <1% | 1% |
| North Dakota | 1% | <1% |
| Ohio | 4% | 5% |
| South Dakota | <1% | <1% |
| Wisconsin | 3% | 2% |

| SOUTHWEST | 2013 Moms with children 10 & under % | 2012 Moms with children 10 & under % |
|---|---|---|
| Arizona | 2% | 2% |
| New México | 1% | <1% |
| Oklahoma | <1% | 1% |
| Texas | 3% | 7% |

| WEST | Moms with children 10 & under % | Moms with children 10 & under % |
|---|---|---|
| Alaska | <1% | - |
| California | 13% | 8% |
| Colorado | 3% | 2% |
| Hawaii | 2% | - |
| Idaho | 1% | 1% |
| Montana | 1% | - |
| Nevada | 1% | 1% |
| Oregon | 2% | 1% |
| Utah | 2% | 1% |
| Wyoming | <1% | <1% |

| SOUTH | Moms with children 10 & under % | Moms with children 10 & under % |
|---|---|---|
| Alabama | 1% | 2% |
| Arkansas | <1% | 1% |
| Florida | 4% | 5% |
| Georgia | 2% | 5% |
| Kentucky | <1% | 1% |
| Louisiana | 1% | 1% |
| Mississippi | <1% | <1% |
| North Carolina | 2% | 3% |
| South Carolina | 1% | 1% |
| Tennessee | 2% | 2% |
| Virginia | 1% | 2% |
| West Virginia | <1% | <1% |

*% Respondents*