



**PRODUCE FOR BETTER HEALTH  
FOUNDATION: Gen X/Y Moms Study  
(Wave 5)**

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**Board of Trustees Meeting**

April 2010



# Agenda

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- Objectives and Methodology
- Consumption and Attitudes
- Campaign Awareness and Impressions
- Benefits
- Barriers
- Communications
- Summary and Recommendations
- *Appendix – Forms of Fruit and Vegetables*
- *Appendix – Demographics*
- *Appendix – Other Slides*

# Objectives

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## Specific Research Objectives

- Gauge awareness and impressions of the “Fruits & Veggies – More Matters” (2009) campaign including the logo and website.
- Track Gen X Moms’ relationship with fruits and vegetables: attitudes, consumption habits, benefits and barriers.
- Begin to assess and track Gen Y Mom’s relationship with fruits and vegetables and identify key significant differences compared to Gen X Moms.

## Methodological notes

- To control for household income (a significant predictor of certain key metrics), the data has been weighted to the distribution of the 2008 study’s household income levels.
- Statistically significant differences between respondent groups (Gen X, Gen Y) are noted by a red circle ○
- 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 □
- Points of interest are called out and noted by an arrow

# Methodology

METHODOLOGY					
Wave	Round 5 (2010)	Round 4 (2009)	Round 3 (2008)	Round 2 (2007)	Round 1 (2006)
<b>Survey Type</b>	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
<b>Fielding Period</b>	January 15 – 29, 2010	January 16 – 22, 2009	January 18 – 22, 2008	February 2 – 9, 2007	October 3 – 5, 2006
<b>Sample Size</b>	n = 1300	n = 1000	n = 1000	n = 1000	n = 550
<b>Confidence Level (within year)</b>	3.1% (19/20 times)	3.1% (19/20 times)	3.1% (19/20 times)	3.1% (19/20 times)	4.2% (19/20 times)
<b>Media Materials Used</b>	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					
<b>Geography</b>	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
<b>Gender</b>	Women only	Women only	Women only	Women only	Women only
<b>Age</b>	“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
<b>Additional Criteria</b>	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



## Gen X Moms reported they consumed more servings of both fruits and vegetables

*How many servings do you personally consume each day?\**

2010	2009	2008	2007	2006
<b>Average Servings of Fruits</b>				
2.68  	2.38  	2.71  	2.17  	1.96 
<b>Average Servings of Vegetables</b>				
2.58  	2.32  	2.48  	2.30  	2.21 
Respondents <small>n = 1000</small>	Respondents <small>n = 1000</small>	Respondents <small>n = 1000</small>	Respondents <small>n = 1000</small>	Respondents <small>n = 550</small>

\*Find full table of data in Appendix slides 107-108, 110-111

Q10. On average, how many pieces of fresh FRUIT, and servings of juice, frozen, canned and dried FRUIT of any sort do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)

Q12. On average, how many servings of fresh, frozen, canned and dried VEGETABLES or VEGETABLE juice of any sort, including salad, and excluding fries and potato chips, do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)









## Gen Y Moms reported eating more servings of fruits and less servings of vegetables than Gen X Moms

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*How many servings do you personally consume each day?\**

Gen X	Gen Y
<b>Average Servings of Fruits</b>	
2.68 	2.83 
<b>Average Servings of Vegetables</b>	
2.55 	2.48 

Gen X, n=1000

Gen Y, n=300

In 2010, the self-reported daily consumption for both fruit and vegetables amongst Gen X Moms varied by household income and employment status.

Amongst both Gen X and Gen Y Moms, consumption varied by the amount of moderate to vigorous physical activity a Mom reported spending each day.

*All other demographic variables did not influence self-reported consumption.*

*(see Appendix slide 114 for detail)*

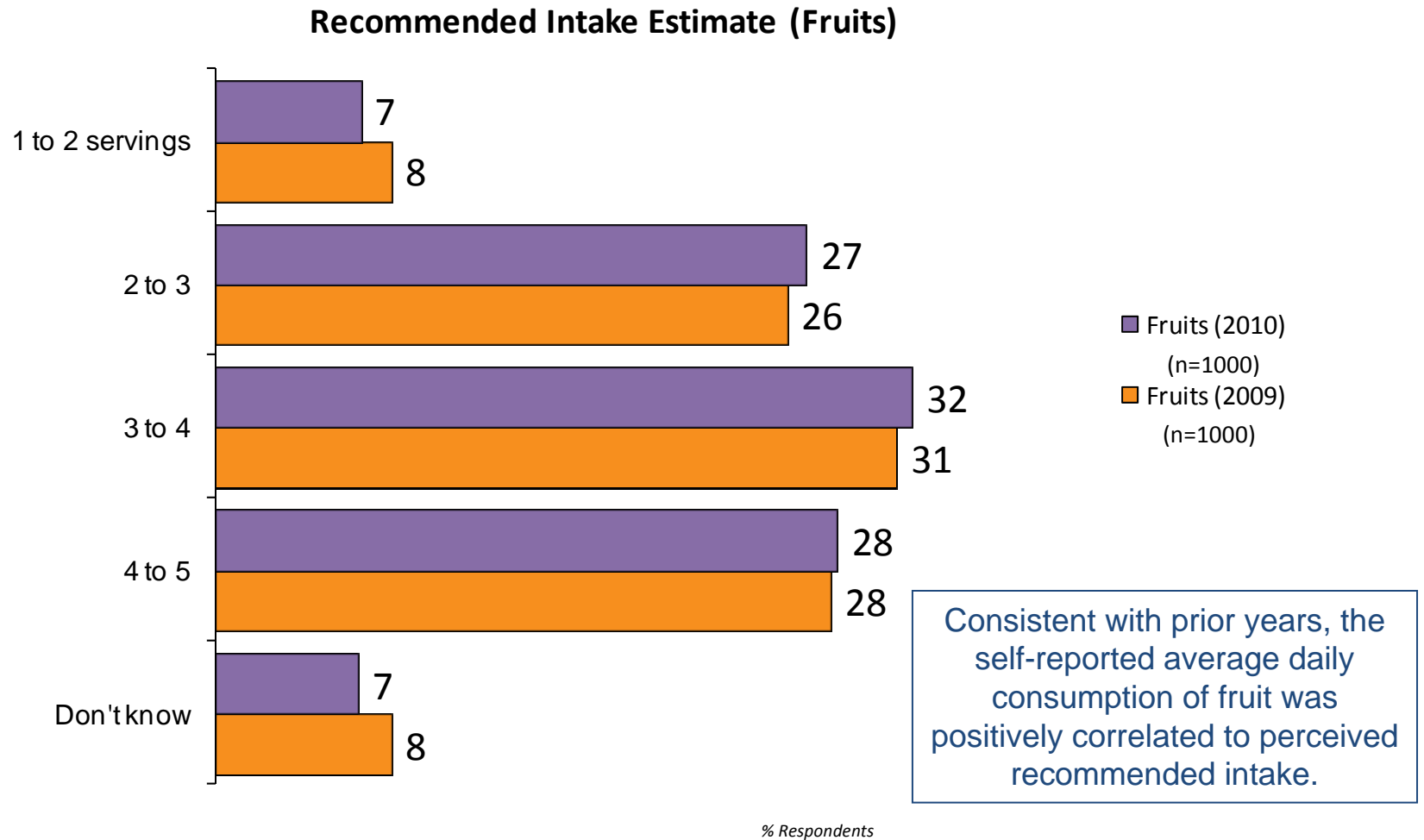
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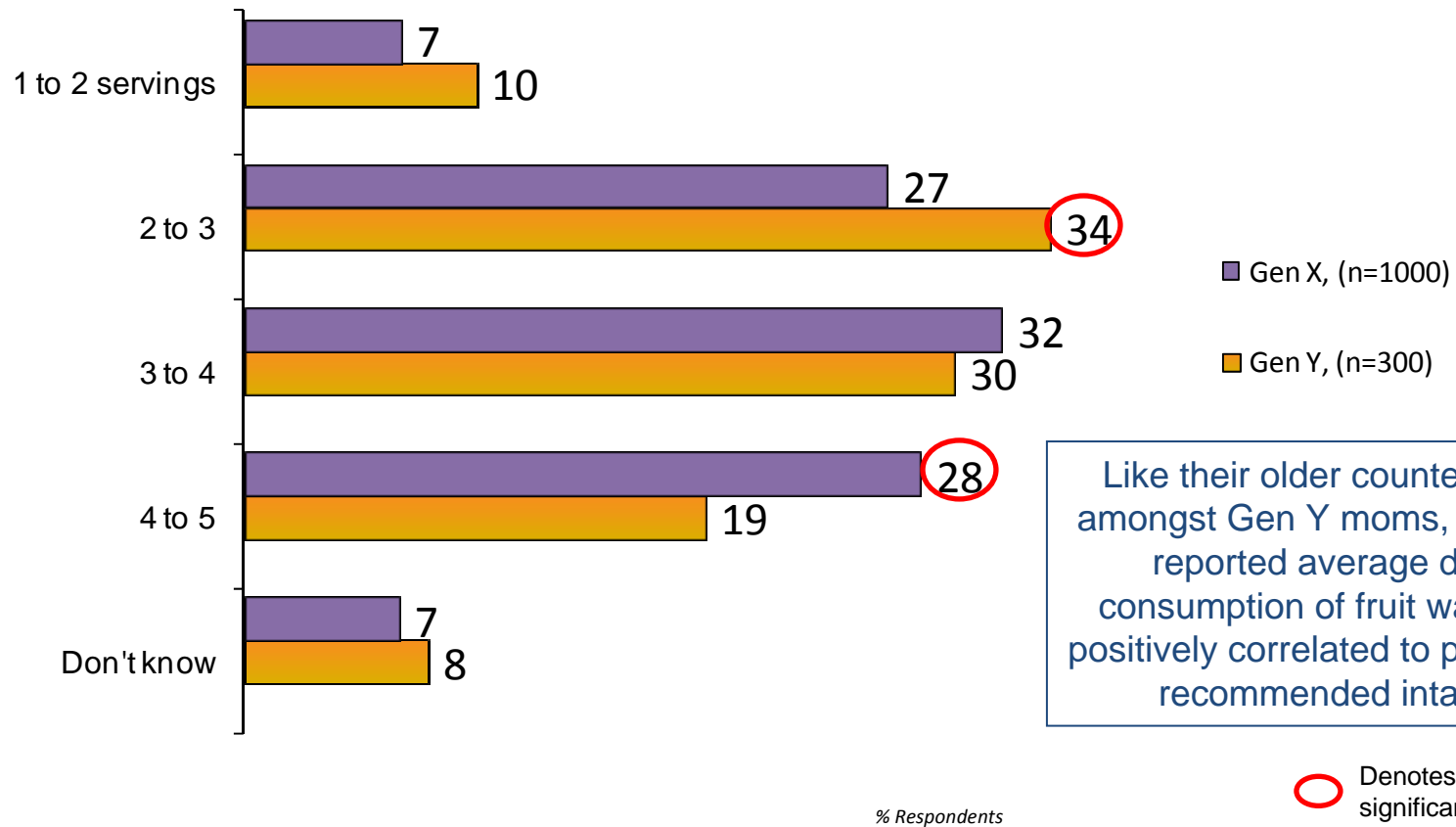


## Most Gen X Moms continue to believe that 3 to 5 daily servings of fruit are recommended





## Recommended Intake Estimate (Fruits) - Gen X vs. Gen Y



Like their older counterparts, amongst Gen Y moms, the self-reported average daily consumption of fruit was also positively correlated to perceived recommended intake.

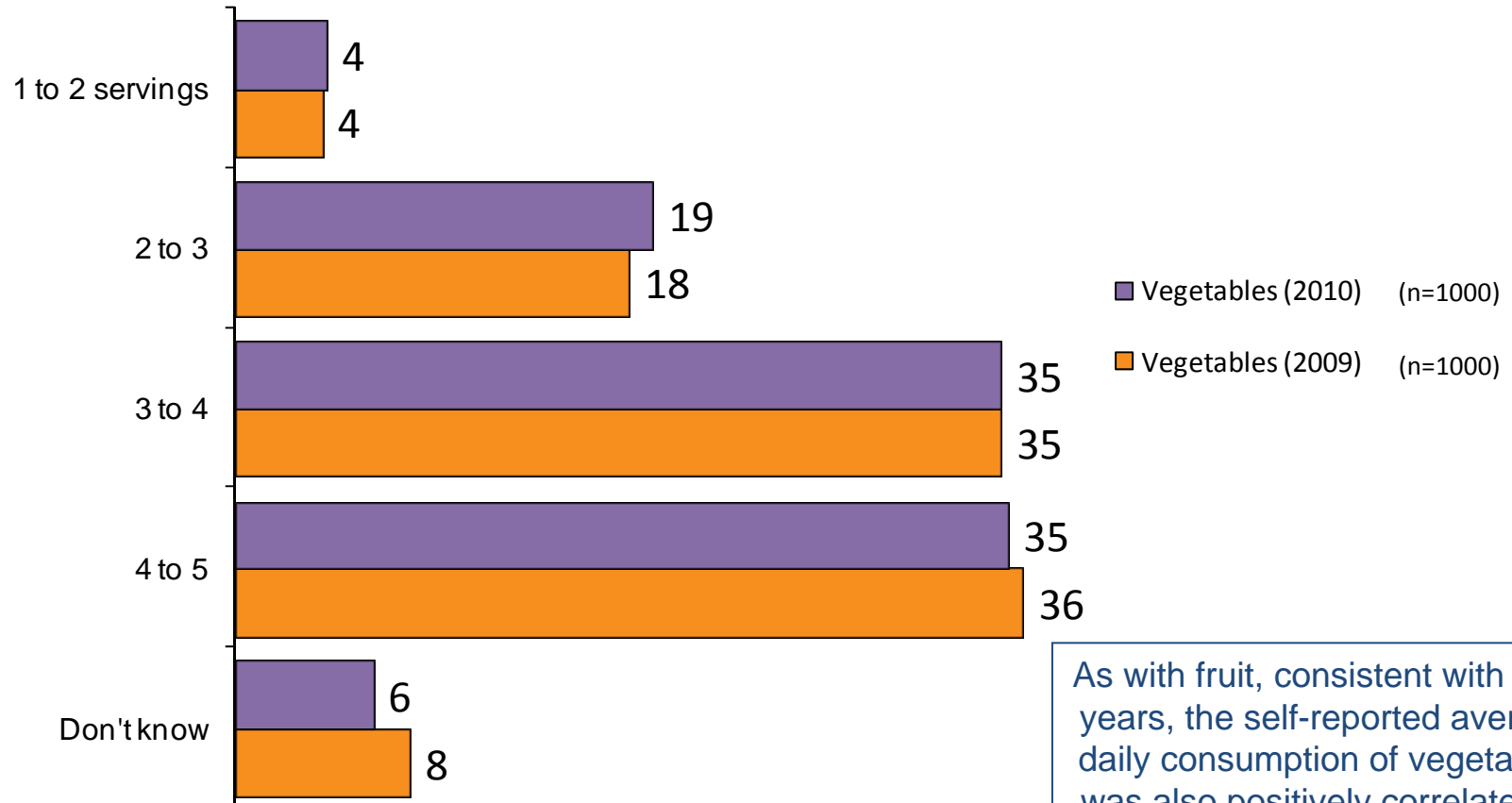
○ Denotes a statistically significant difference between respondent groups



## Most Gen X Moms continue to believe that 3 to 5 daily servings of vegetables are recommended

10

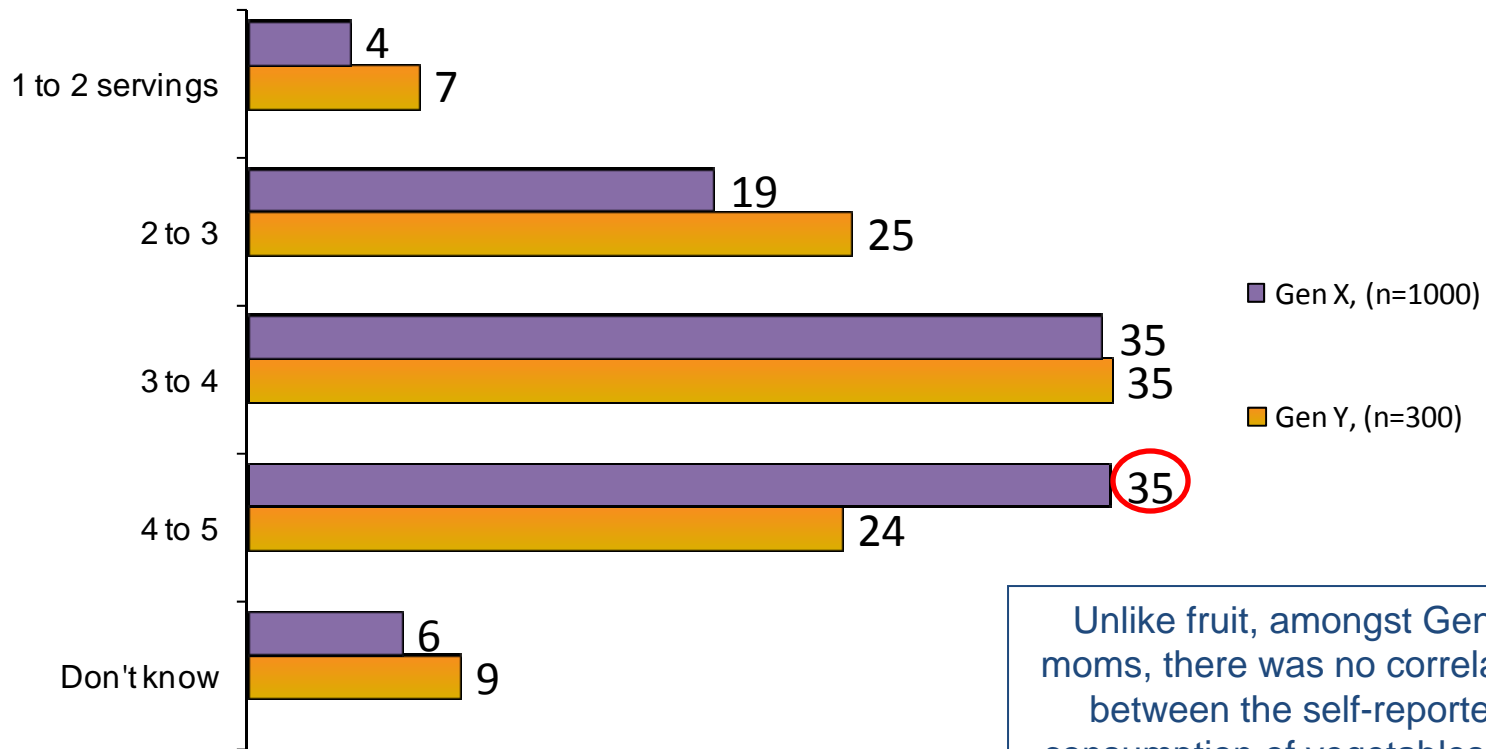
### Recommended Intake Estimate (Vegetables)



As with fruit, consistent with prior years, the self-reported average daily consumption of vegetables was also positively correlated to perceived recommended intake.

% Respondents

**Recommended Intake Estimate (Vegetables) - Gen X vs. Gen Y**



○ Denotes a statistically significant difference between respondent groups

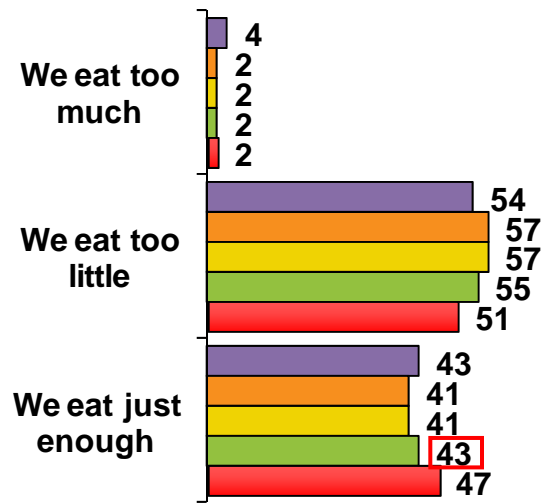
Unlike fruit, amongst Gen Y moms, there was no correlation between the self-reported consumption of vegetables and perceived recommended intake.

% Respondents



## Most Gen X Moms continue to believe that their family's eat too little fruit and vegetables

### The family's consumption of FRUIT



% Respondents

### The family's consumption of VEGETABLES



% Respondents

○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

Q15. Which of these statements best represents your family's eating habits for each of the following? (Include fresh, canned, frozen, dried, and 100% juice)



## Gen Y Moms slightly more likely to believe their families already consume too much fruit and vegetables

13

### The family's consumption of FRUIT



% Respondents

### The family's consumption of VEGETABLES



% Respondents

■ Gen X, n=1000  
■ Gen Y, n=300

○ Denotes a statistically significant difference between respondent groups

Q15. Which of these statements best represents your family's eating habits for each of the following? (Include fresh, canned, frozen, dried, and 100% juice)

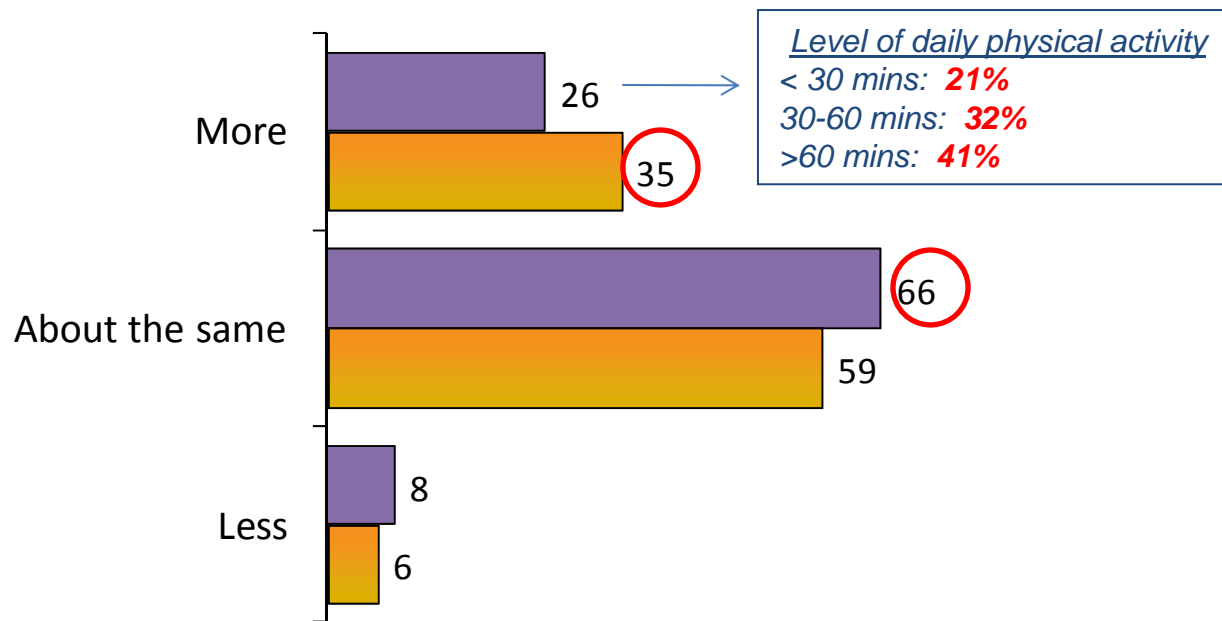




# Moms report generally buying the same amount of fruit compared to a year earlier – More physically active Gen X Moms and all Gen Y Moms more likely to report an increase



Did you buy less, more or about the same amount of fruit in the past three months compared to one year earlier?



**Net Change in Fruit Purchasing\*:**  
Gen X: +18%  
Gen Y: +29%

■ Gen X, n=1000  
■ Gen Y, n=300

○ Denotes a statistically significant difference between respondent groups

% Respondents

\*Net Change represents % respondents who purchased "more" less % who purchased "less."

Q35. Did you buy less, more or about the same amount of fruit in the past three months compared to one year earlier?

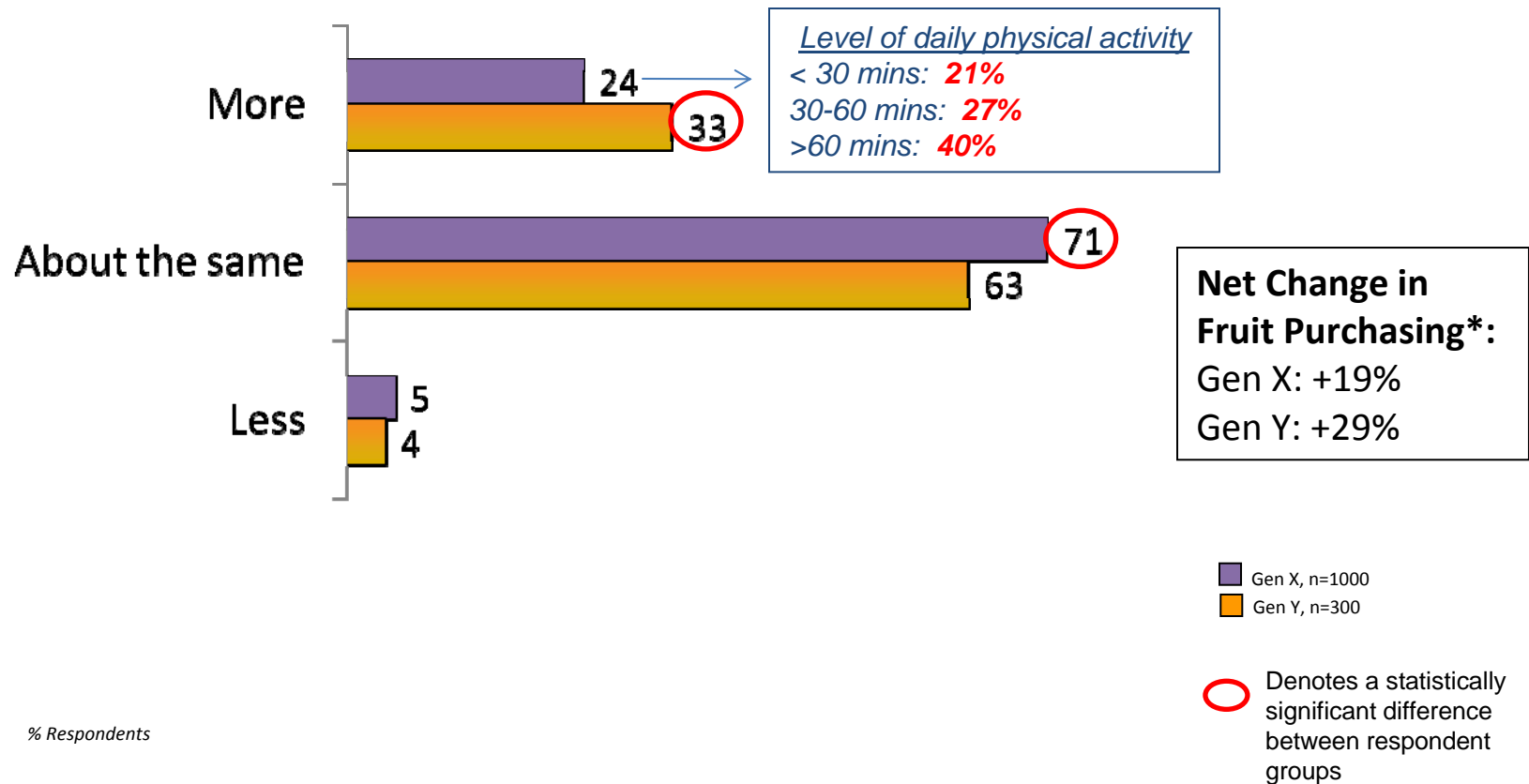




Similarly, Moms report generally buying the same amount of vegetables compared to a year earlier – More physically active Gen X Moms and Gen Y Moms more likely to report an increase



Did you buy less, more or about the same amount of vegetables in the past three months compared to one year earlier?

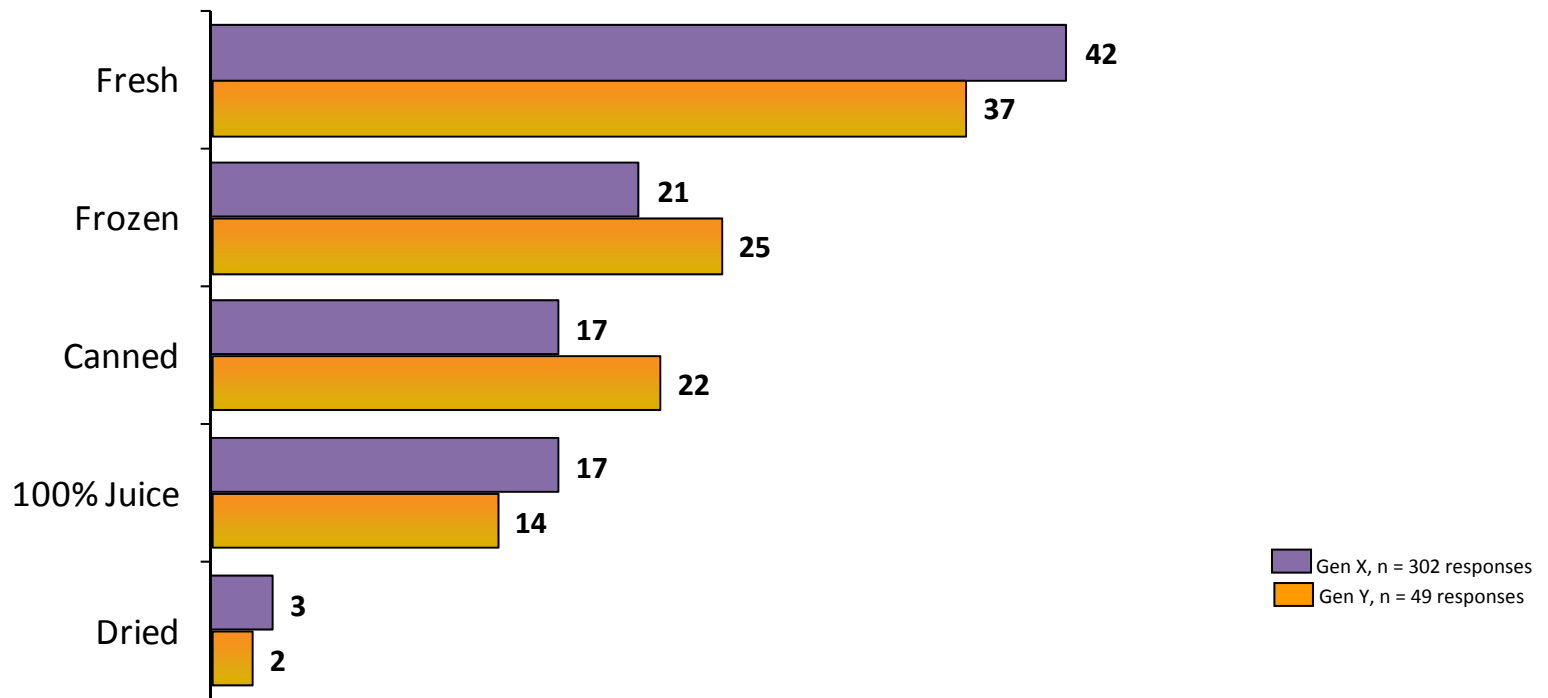


\*Net Change represents % respondents who purchased "more" less % who purchased "less."

Q36. Did you buy less, more or about the same amount of vegetables in the past three months compared to one year earlier?



*What comes to mind when you think of fruits and vegetables?*



*% Responses. Does not include responses not indicating type of fruit or vegetable (i.e. fresh, frozen, etc) nor those respondents who did not understand the question.*



## Frequency of Purchase - Fruits



○ Denotes a statistically significant difference between respondent groups

Gen X, n=1000  
Gen Y, n=300



# Fresh vegetables are the most frequently purchased form of vegetables, particularly amongst Gen Y moms



## Frequency of Purchase - Vegetables



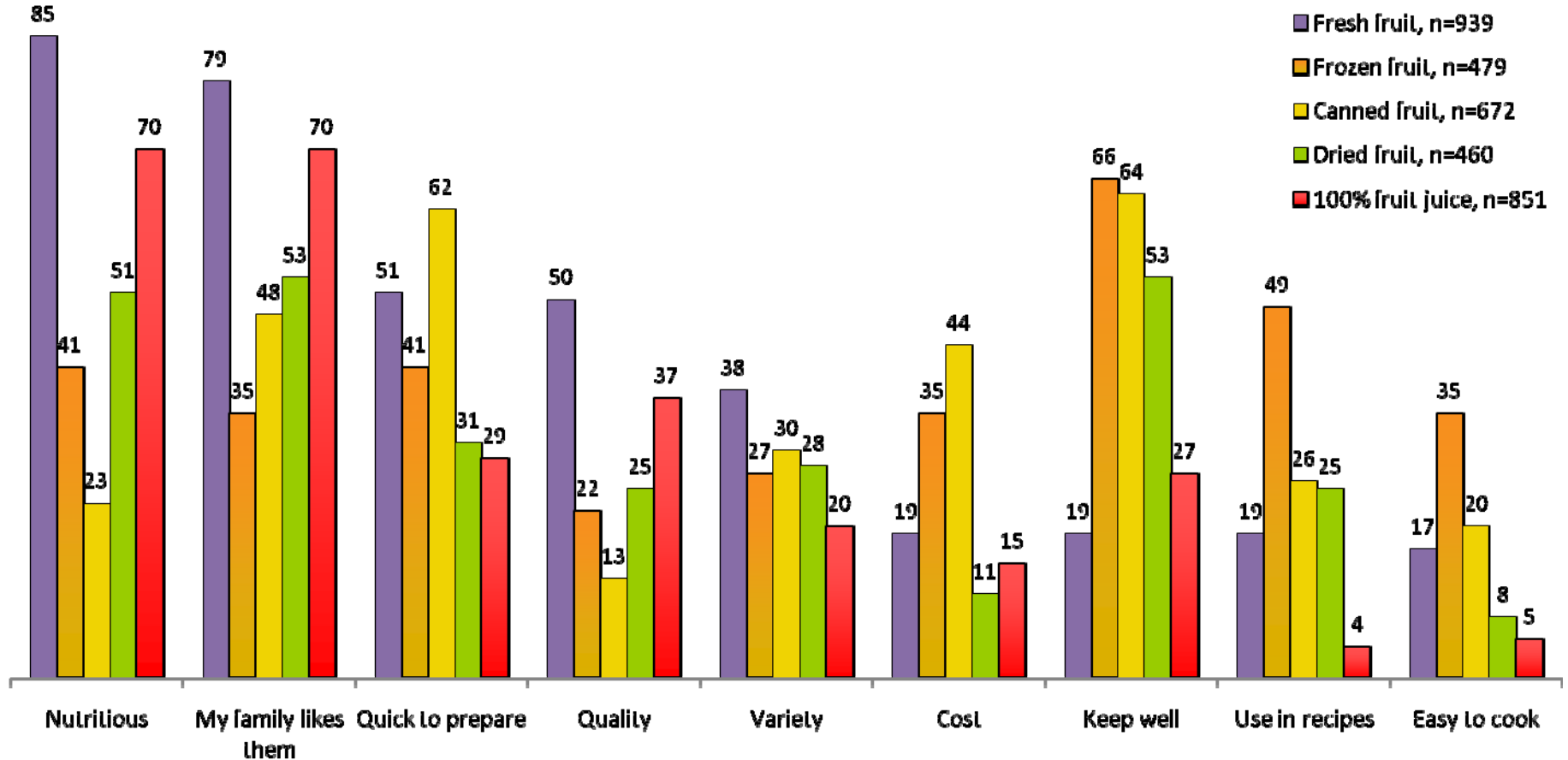
○ Denotes a statistically significant difference between respondent groups

Gen X, n=1000  
Gen Y, n=300



Q40: How frequently do you purchase the following types of vegetables?

Reasons for purchasing various forms of fruit



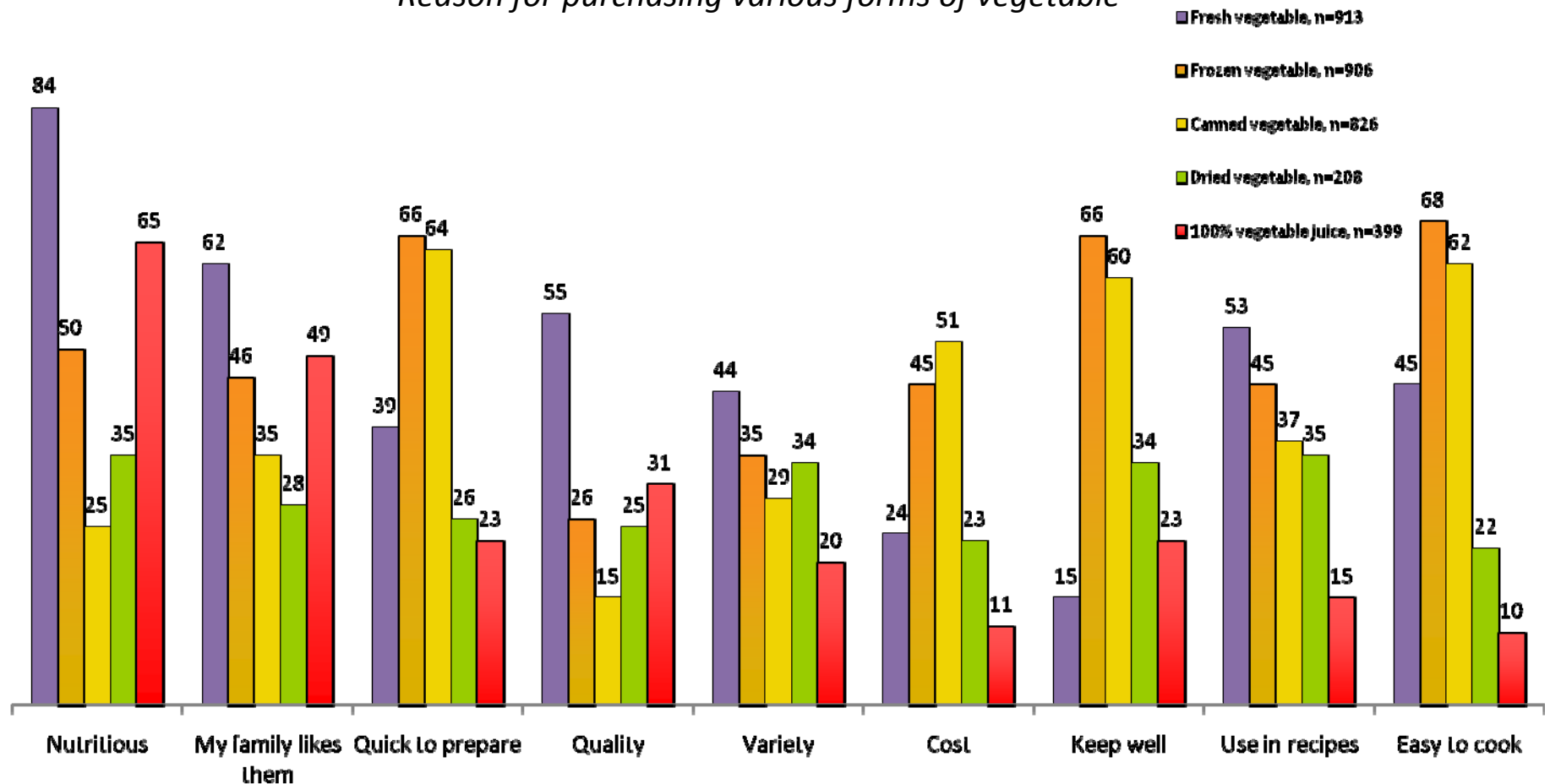
Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of fruit in question available in their homes.

2010 Responses only

Q25-29: Why do you purchase various forms of fruit? (Please select all that apply)

## Fresh vegetables and vegetable juice mainly purchased for nutrition and family preference – other forms mainly for convenience and shelf-life

Reason for purchasing various forms of vegetable



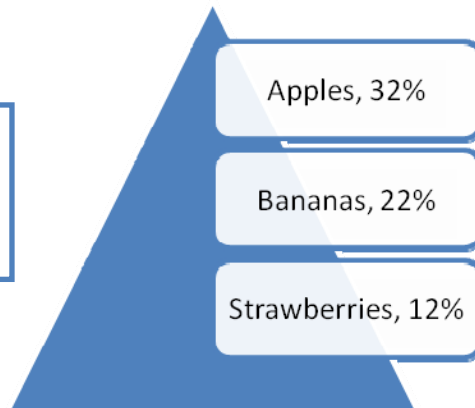
Please note: number of respondents will vary as this question was only asked to those respondents who reported keeping the form of vegetable in question available in their homes.

2010 Responses only

Identify a fruit that is a favorite within your family

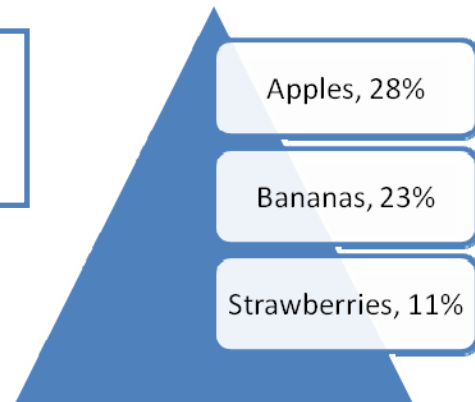
## Gen X

**Top 3 fruits selected by Gen X mom's represent 64% of the total responses for favorite fruit.**



## Gen Y

**Top 3 fruits selected by Gen Y mom's represent 61% of the total responses for favorite fruit.**



Other fruits, Gen X	Other fruits, Gen Y
Grapes, 8%	Oranges, 9%
Oranges, 7%	Pineapple, 5%
Pineapple, 4%	Grapes, 5%
Peaches/Nectarines, 3%	Peaches/Nectarines, 4%
Pears, 2%	Watermelon, 3%
Watermelon, 2%	Berries, 2%
Berries, 2%	Pears, 2%
Clementine's/Tangerine's, 2%	Clementine's/Tangerine's, 2%
Grapefruit, 1%	Kiwi, 1%
Mango, 1%	Canned fruit, 1%
Kiwi, 1%	Fresh, 1%
Melon, 1%	Mango, 1%
Apple Sauce, 1%	Melon, 1%
Canned, <1%	Cherries, 1%
Fresh, <1%	Grapefruit, <1%
Cherries, <1%	Apple sauce, <1%

% Respondents

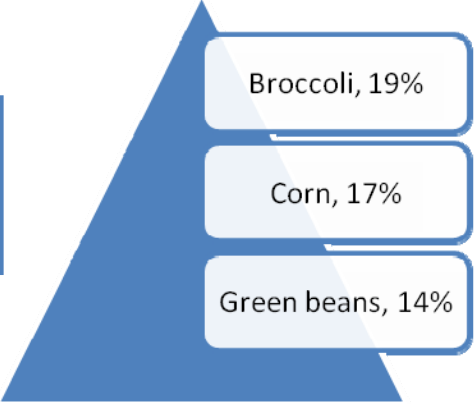
Gen X, n=992

Gen Y, n=295

Identify a vegetable that is a favorite within your family

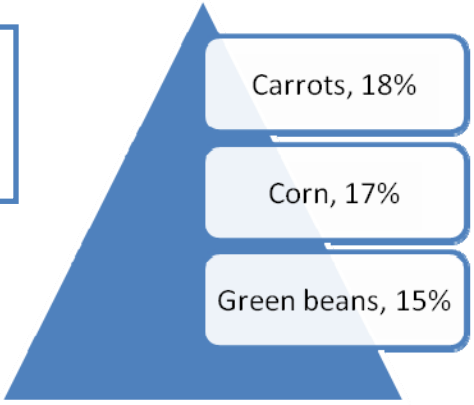
### Gen X

**Top 3 vegetables** selected by **Gen X** mom's represent **50%** of the total responses for favorite fruit.



### Gen Y

**Top 3 vegetables** selected by **Gen Y** mom's represent **50%** of the total responses for favorite fruit.



Other vegetables, Gen X	Other vegetables, Gen Y
Carrots, 13%	Broccoli, 12%
Potatoes, 6%	Potatoes, 6%
Peas, 4%	Salad/lettuce, 5%
Salad/lettuce, 4%	Peas, 3%
Spinach, 4%	Spinach, 3%
Tomatoes, 4%	Tomatoes, 3%
Cucumber, 3%	Cucumber, 3%
Beans (general, lima), 2%	Beans (general, lima), 2%
Asparagus, 2%	Canned, 2%
Celery, 2%	Mushrooms, 2%
Peppers, 1%	Celery, 1%
Cauliflower, 1%	Asparagus, 1%
Cabbage, 1%	Peppers, 1%
Canned, <1%	Cauliflower, 1%
Squash, <1%	Squash, 1%
Fresh, <1%	Fresh, <1%
Sweet potatoes, <1%	Cabbage, <1%
Mushrooms, <1%	Sweet potatoes, <1%

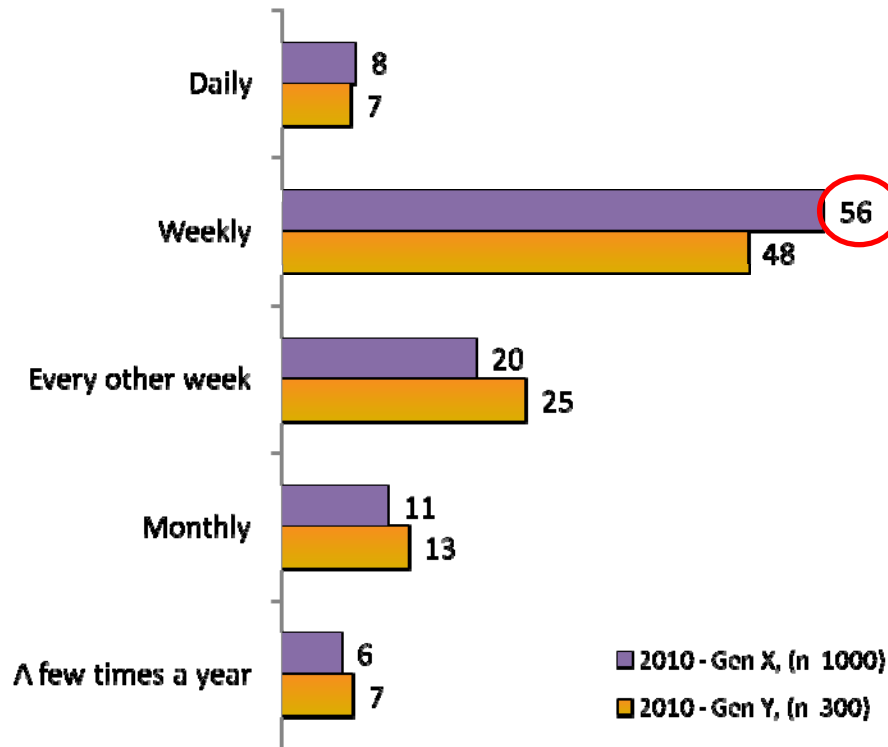
% Respondents  
 Gen X, n=984  
 Gen Y, n=290

Q58. Please identify a vegetable that is a favorite within your family (it can be fresh, canned, frozen, dried or 100% juice). (open-ended question)

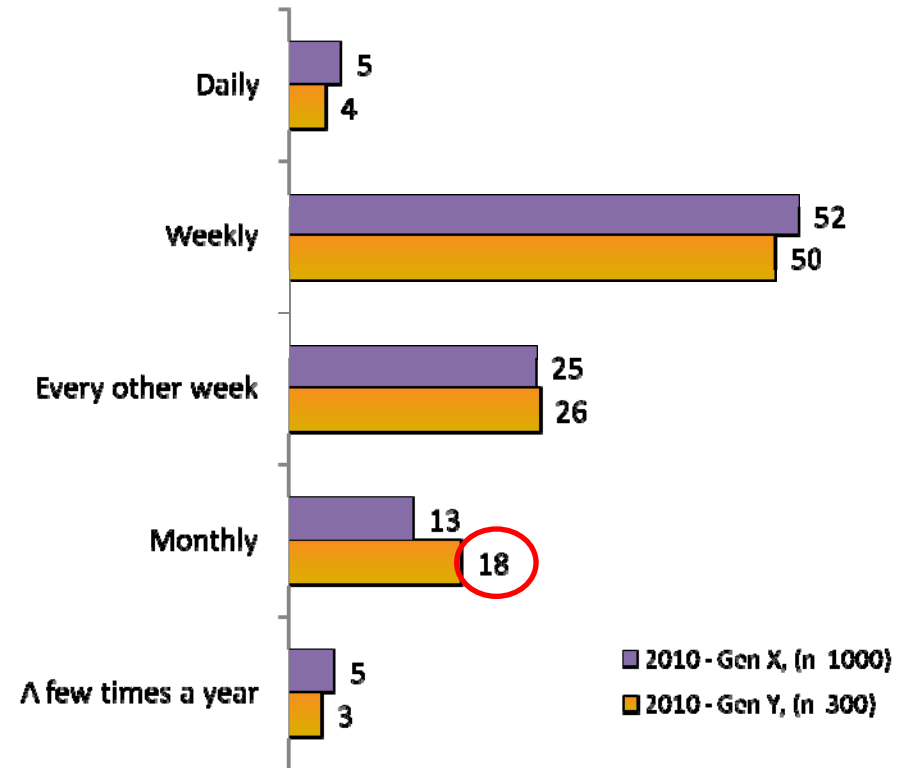
# Both Gen X and Y moms tend to purchase fruits and vegetables on a weekly basis when they are at their regular price



**Frequency of Fruit Purchase at Regular Price:  
Gen X vs. Gen Y**



**Frequency of Vegetable Purchase at Regular Price:  
Gen X vs. Gen Y**



Denotes a statistically significant between respondent groups



## Gen X Moms are even more motivated to get their families to eat more fruits and vegetables

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Please review the following statements and tell us your level of agreement or disagreement with each:

		Strongly Agree	Somewhat Agree	Total "Agree"	Somewhat Disagree	Strongly Disagree	Total "Disagree"	Net Score*
Getting my family to eat more fruits and vegetables is not among my most pressing concerns around ensuring their health and welfare	2010	10	12	22	29	30	59	-37%
	2009	6	16	22	24	19	43	-21%
	2008	6	17	22	31	21	52	-30%
I am not strongly motivated to try and feed my family more fruits and vegetables because I know that they already get enough	2010	9	12	21	29	32	61	-40%
	2009	8	12	20	27	26	53	-33%
	2008	6	14	20	29	27	56	-36%
Getting my family to eat even more fruits and vegetables than they do already is not worth the struggle	2010	7	7	14	31	43	74	-60%
	2009	4	9	13	31	36	67	-54%
	2008	3	9	12	33	37	70	-58%

○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

% Respondents (n=1000)

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



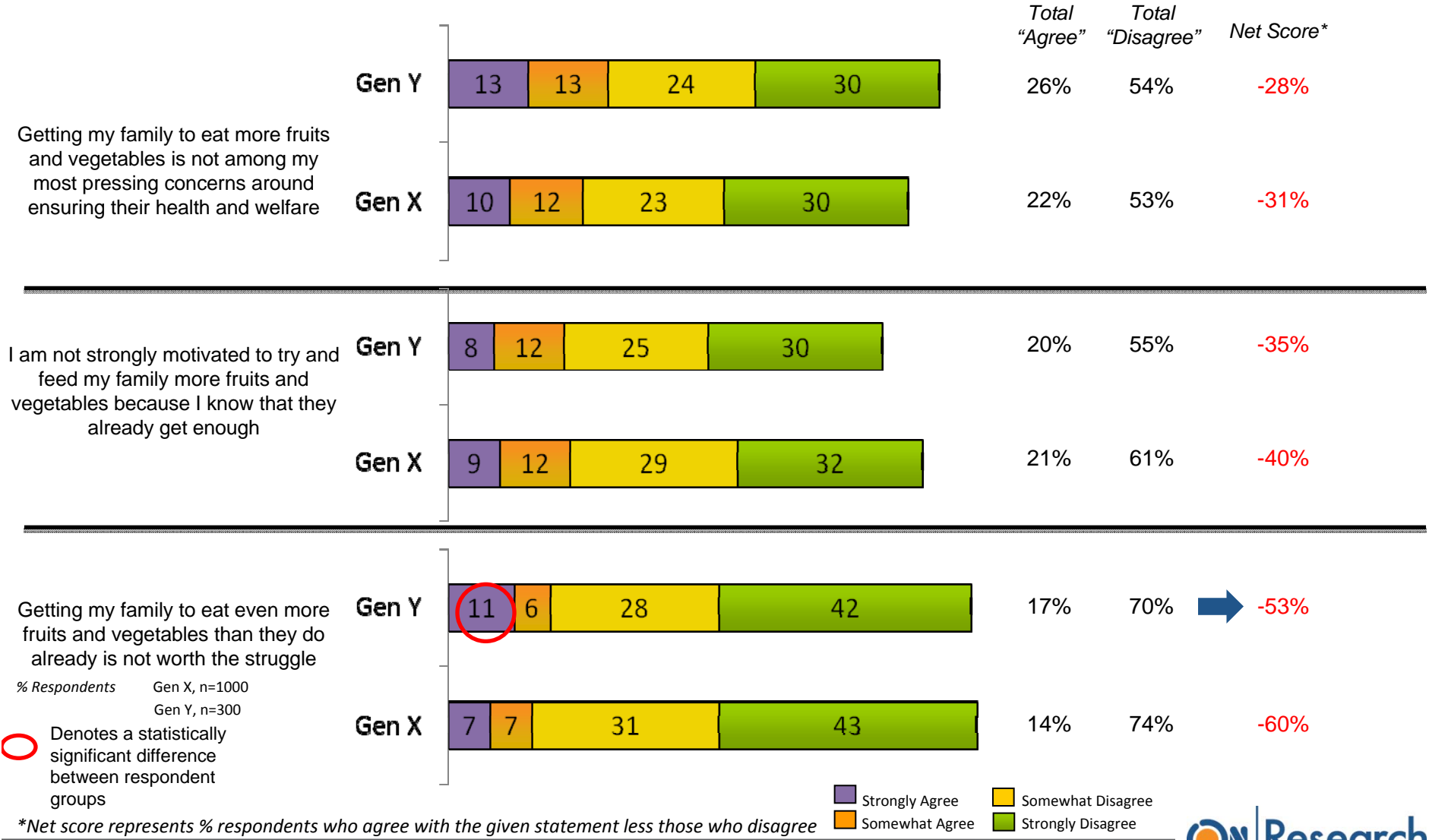
Q14. Please review each of the following statements and tell us your level of agreement or disagreement with each.





# Gen Y Moms slightly more likely to find motivating their families to eat more fruits and vegetables a struggle

Please review the following statements and tell us your level of agreement or disagreement:

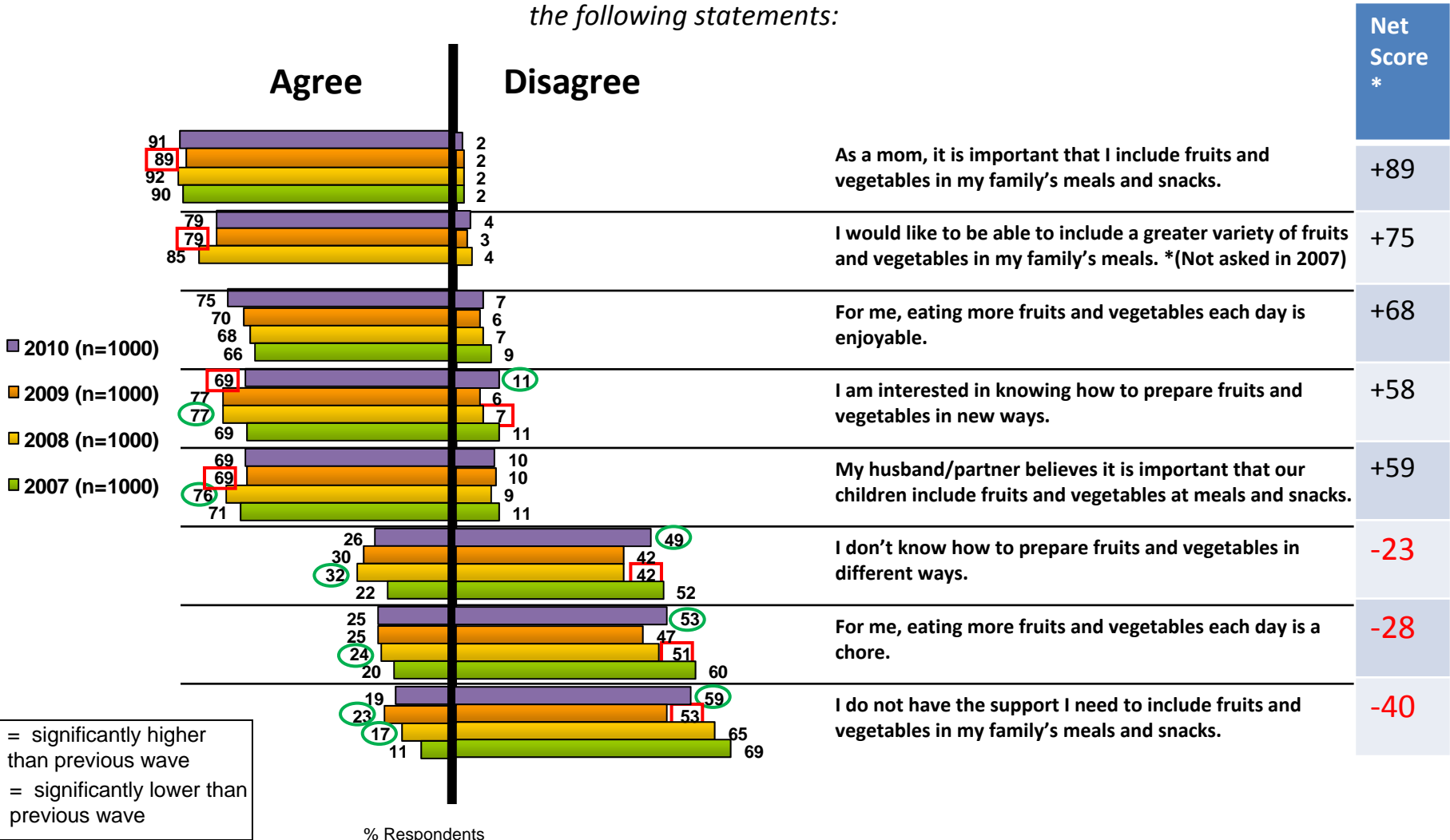


Q14. Please review each of the following statements and tell us your level of agreement or disagreement with each.



# Gen X Moms continue to believe it is their responsibility to include fruits and vegetables in their family's meals

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



\*Net score represents % respondents who agreed with the statement less those who disagreed with any given statement.



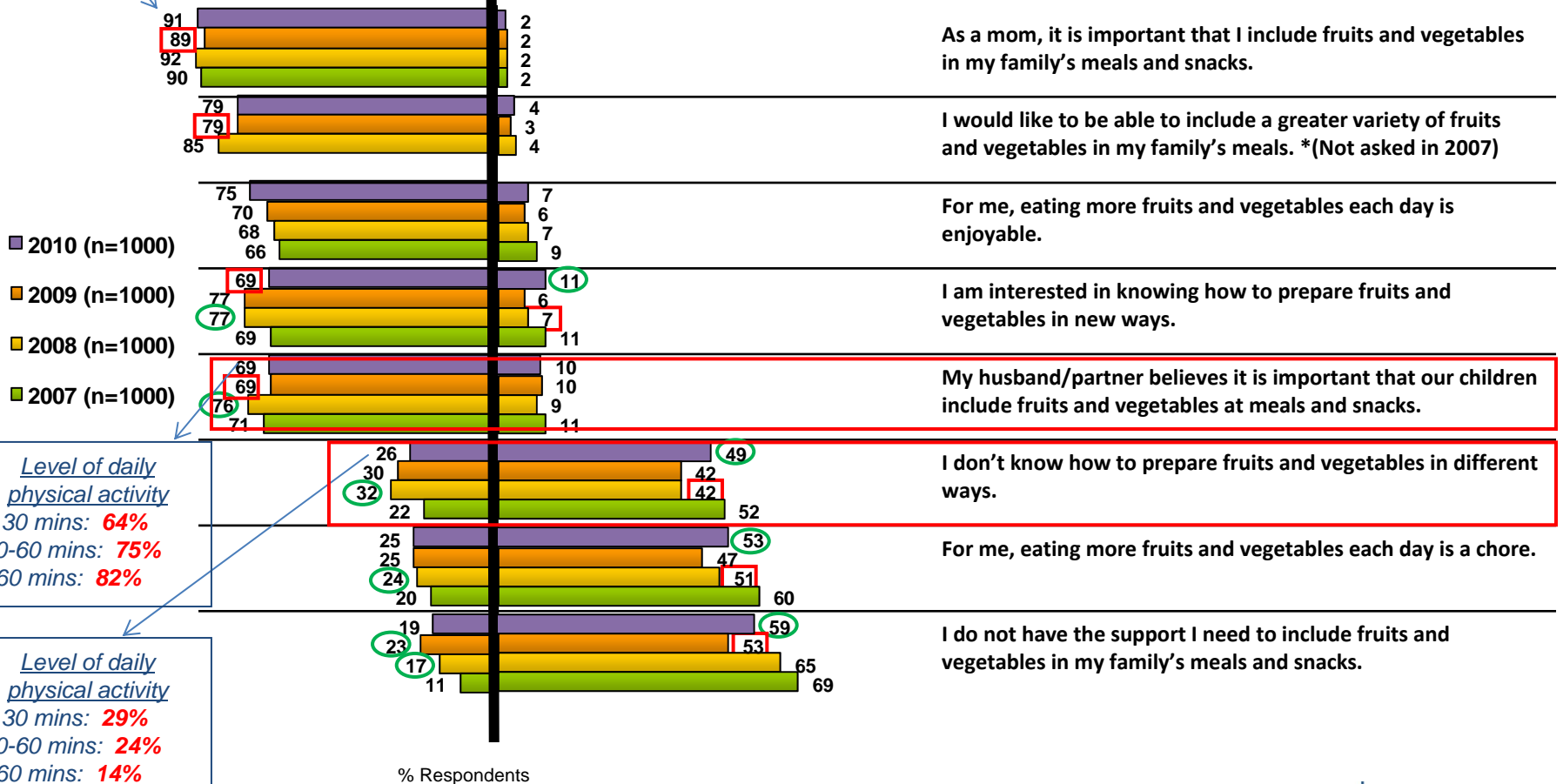


**Gen X Moms with lower HHI are less likely to feel it is their role to include fruits/vegetables in their family's meals; Less physically active Gen X Moms have less support from their husbands and need more advice on preparing fruits/vegetables in different ways**

HHI  
 < \$75k: **86%**  
 > \$75k: **93%**

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

**Agree** **Disagree**

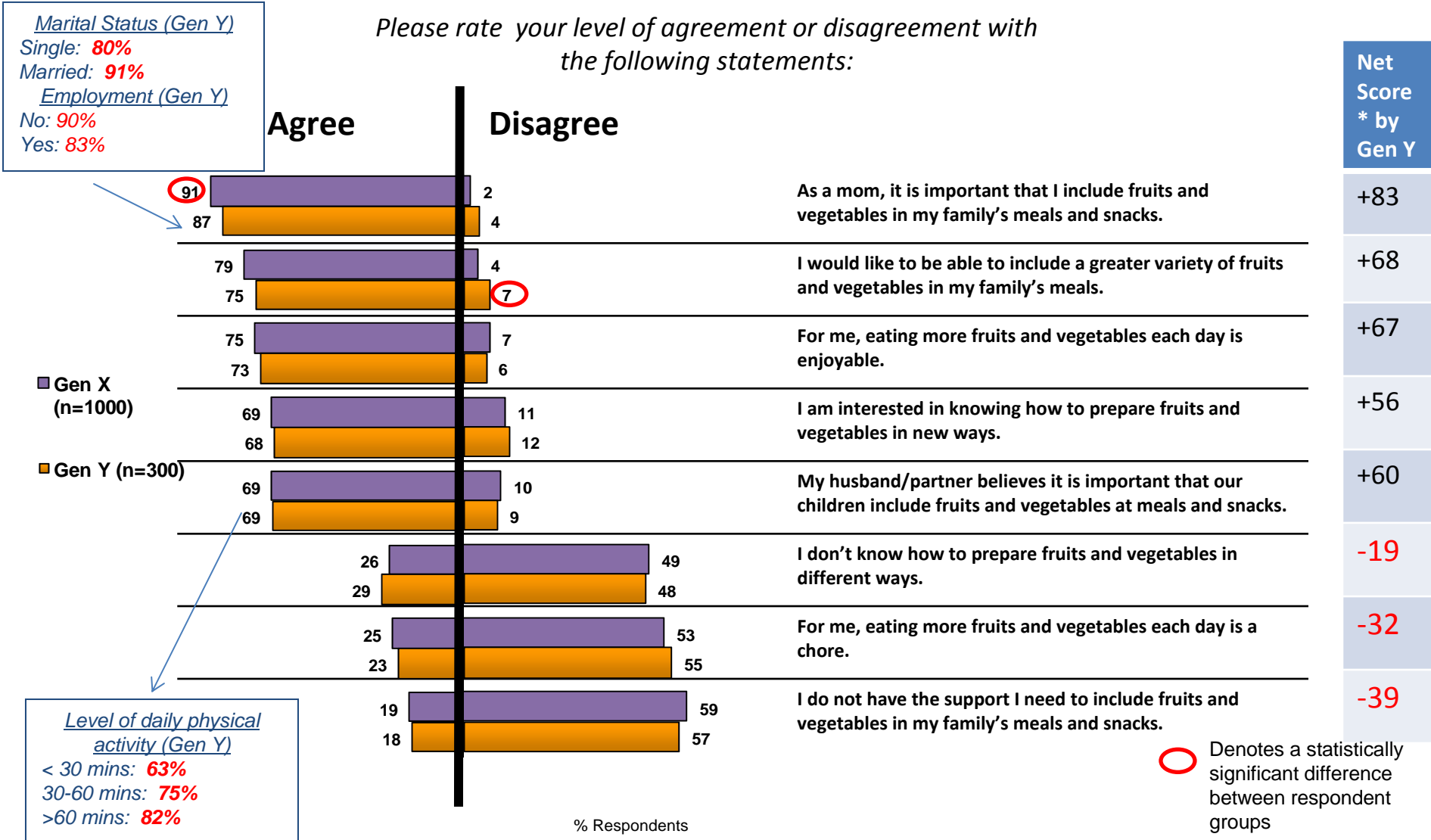


Level of daily physical activity  
 < 30 mins: **64%**  
 30-60 mins: **75%**  
 >60 mins: **82%**

Level of daily physical activity  
 < 30 mins: **29%**  
 30-60 mins: **24%**  
 >60 mins: **14%**



# Amongst Gen Y Moms, single moms less likely to feel it is their role to include fruits/vegetables in their family's meals while those who are less physically active receive less support from their husbands



\*Net score represents % respondents who agreed with the statement less those who disagreed with any given statement.

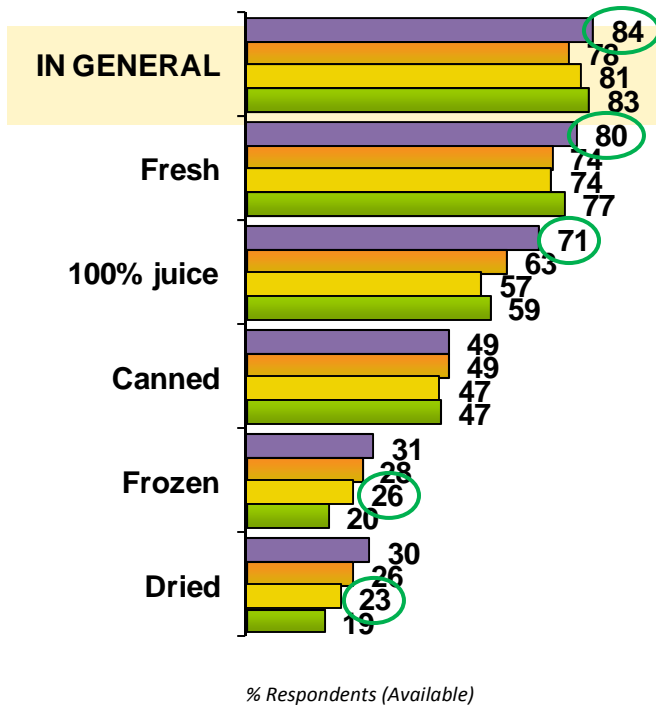




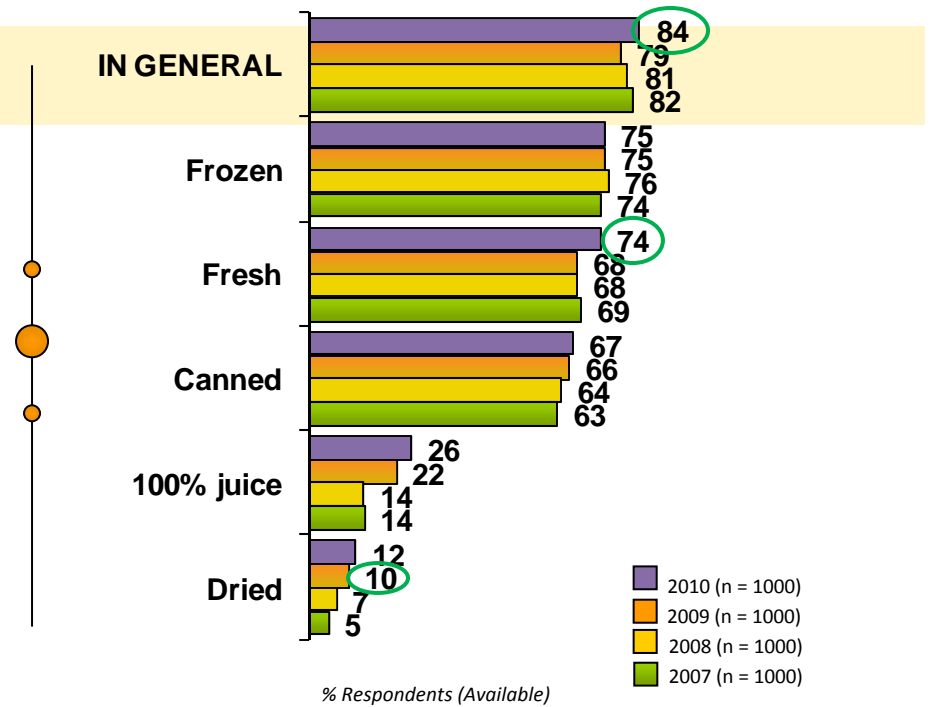
# Gen X Moms more likely to make fruits and vegetables available in the home, particularly fresh fruit and vegetables and 100% fruit juice

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

## FRUIT



## VEGETABLES

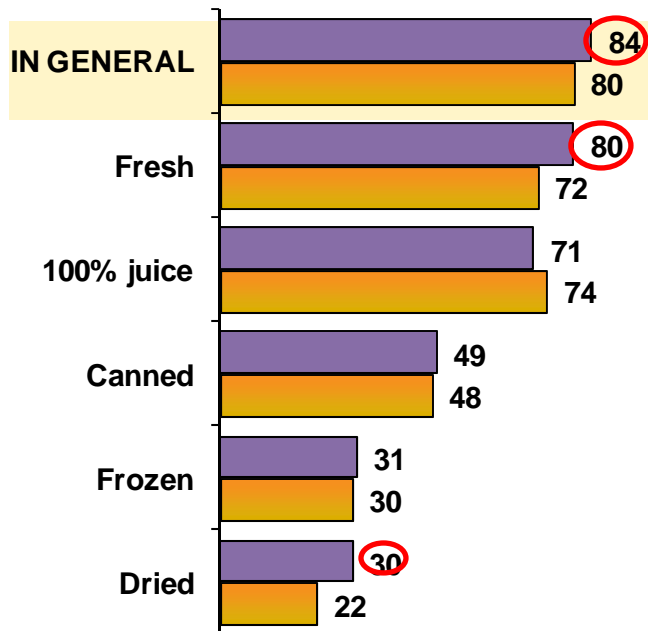


○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

# Gen X Moms more likely to make fresh and dried fruit as well as frozen vegetables available in their homes

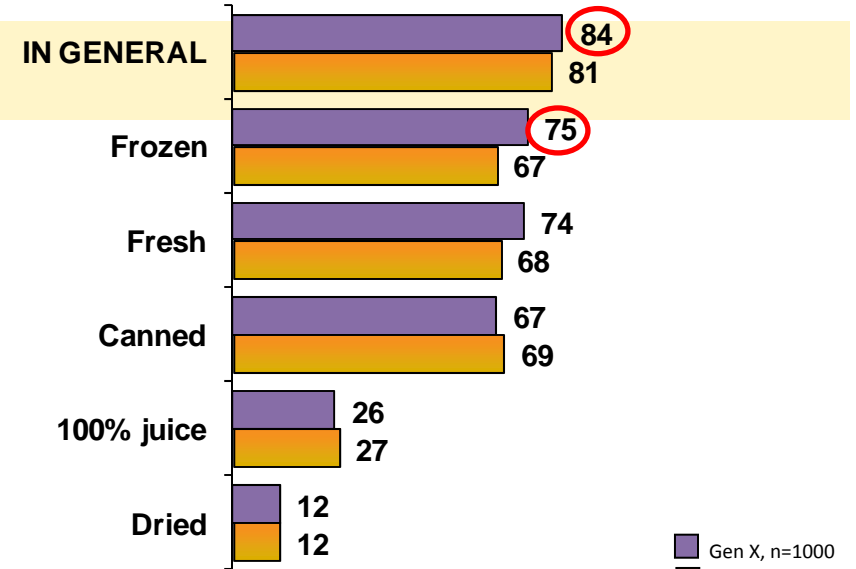
How available are fruit and vegetables in your home?

## FRUIT



% Respondents (Available)

## VEGETABLES



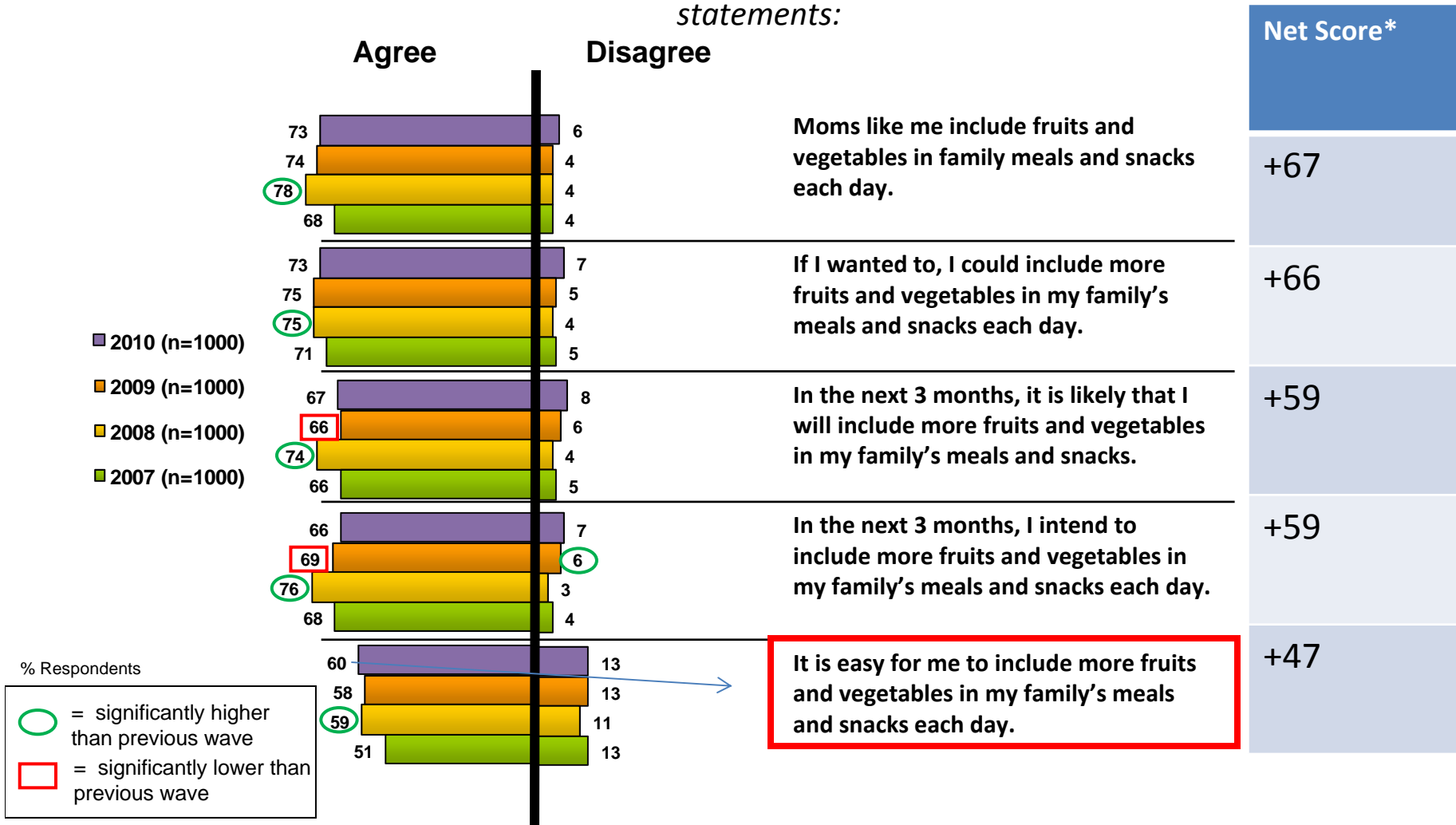
% Respondents (Available)

Gen X, n=1000  
Gen Y, n=300

○ Denotes a statistically significant difference between respondent groups

## Consistent with the prior year, most Gen X Moms intend to include more fruits and vegetables in daily meals and snacks in the coming 3 months – the least physically active Gen Y Moms finding it hardest to include more fruits/vegetables in meals

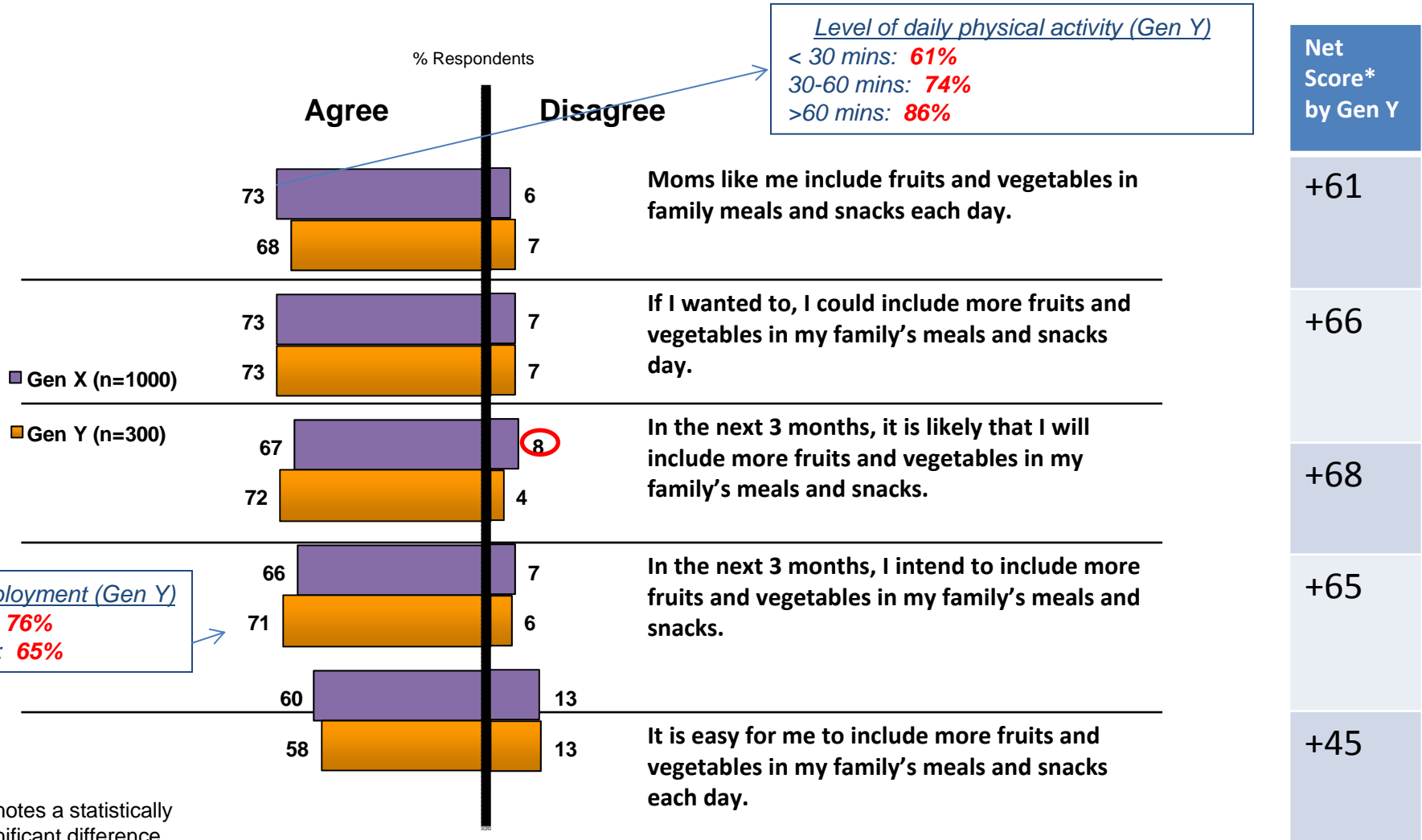
Please indicate your agreement or disagreement with these statements:



\*Net score represents % respondents who agreed with the statement less those who disagreed with any given statement. Q43. Please indicate your agreement or disagreement with these statements.



While Gen Y Moms do not differ significantly from their Gen X counterparts, amongst Gen Y Moms, those who are less physically active are less likely to include fruits/vegetables in meals and snacks every day while working Gen Y moms are less likely to intend to include more fruits/vegetables in meals in the next 3 months



\*Net score represents % respondents who agreed with the statement less those who disagreed with any given statement.



Q43. Please rate your level of agreement or disagreement with the following statements.

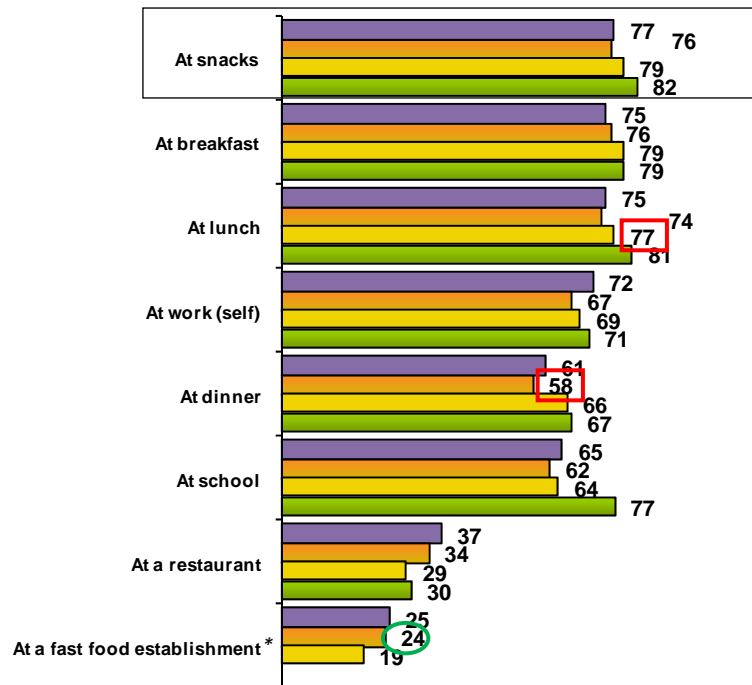




# Gen X Moms consistently identify similar opportunities for their families' consumption

How easy is it for you to get your family to eat fruit and vegetables at different times throughout the day?

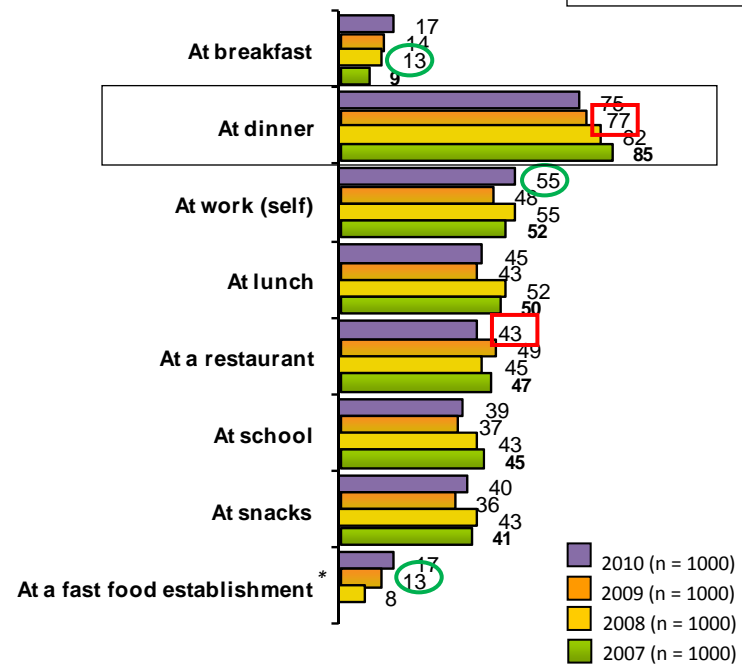
## FRUIT



% Respondents (Easy)

\*Not included as an option in 2007

## VEGETABLES



% Respondents (Easy)

Easiest time to get family to eat fruits/vegetables

○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

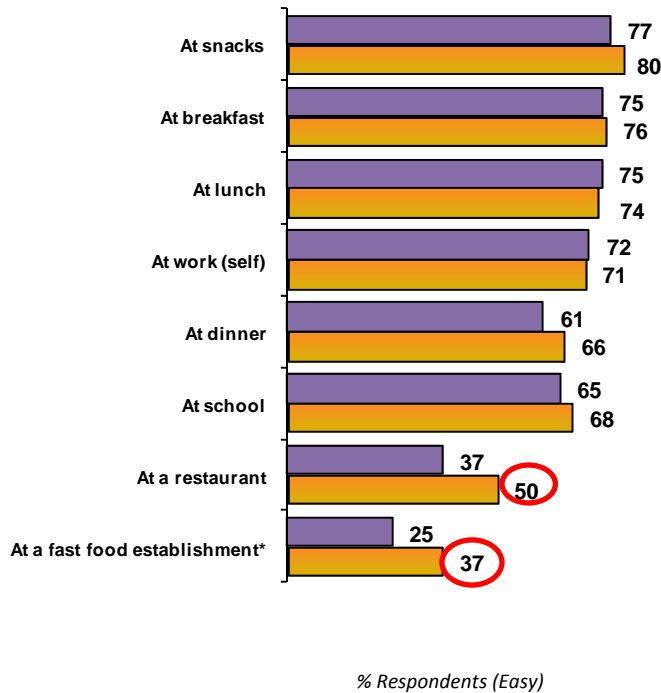
Q52. How easy is it for you to get your family to eat VEGETABLES at the following times?  
 Q53. Please rate how easy it is to get your family to eat FRUIT at the following times?



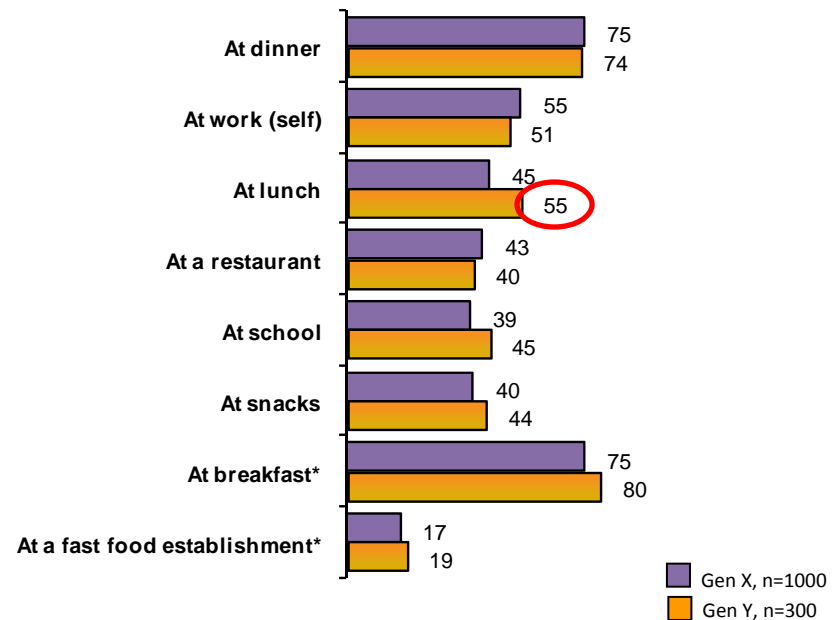
## Gen Y Moms find it easier in a few specific contexts

How easy is it for you to get your family to eat fruit and vegetables at different times throughout the day?

### FRUIT



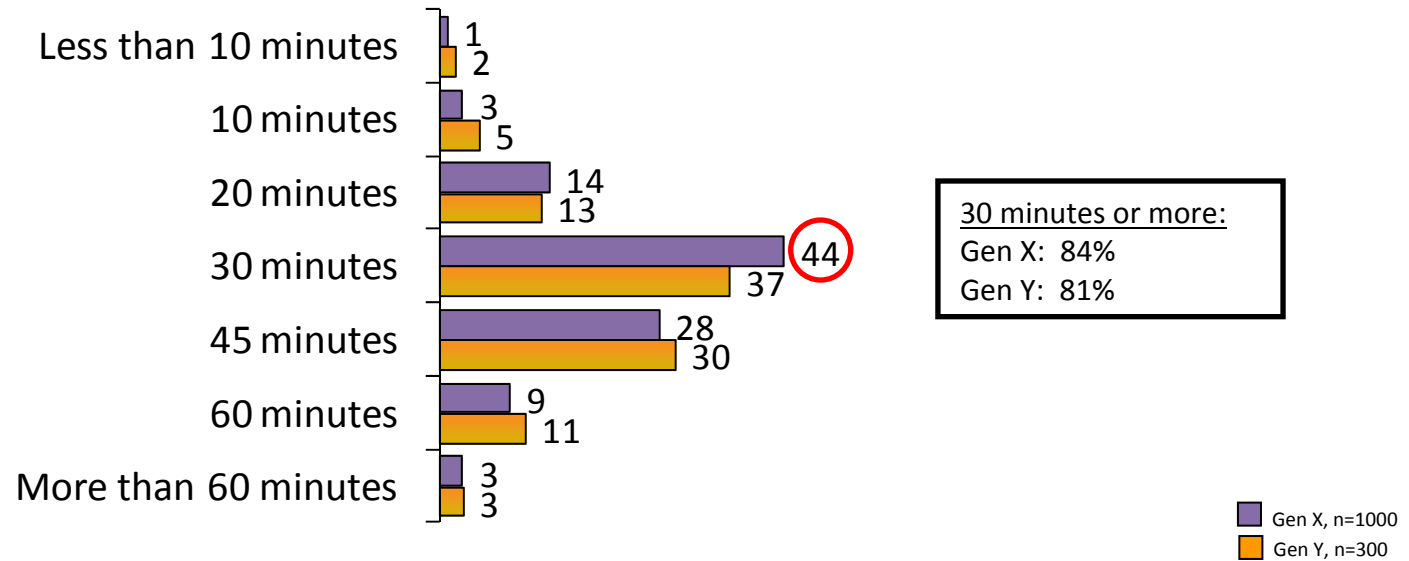
### VEGETABLES



Denotes a statistically significant difference between respondent groups

Q52. How easy is it for you to get your family to eat VEGETABLES at the following times?  
 Q53. Please rate how easy it is to get your family to eat FRUIT at the following times?

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

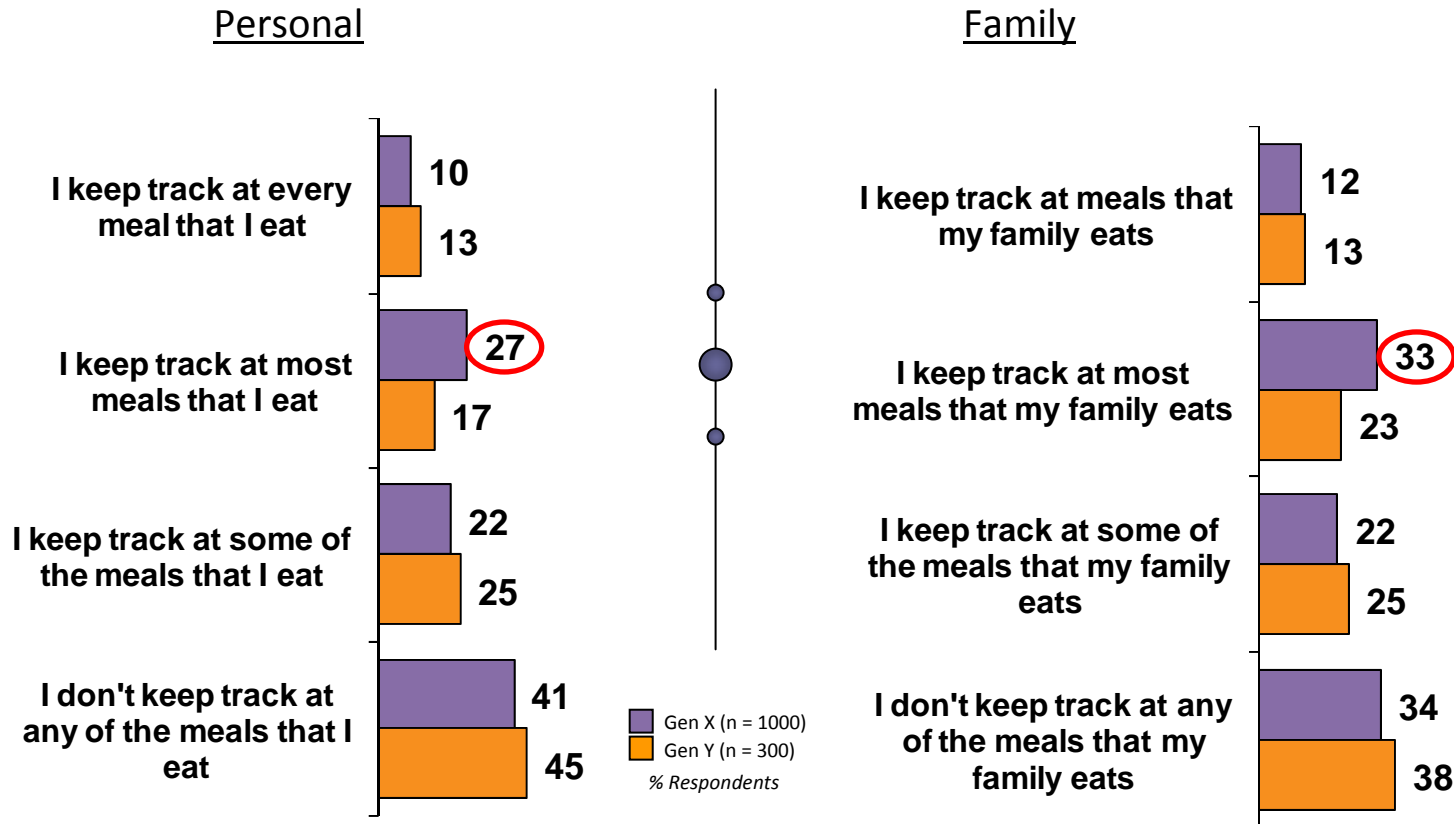


% Respondents

○ Denotes a statistically significant difference between respondent groups



# Both Gen X and Gen Y Moms report tracking consumption for at least some meals, particularly their family's – Gen X Moms most diligent



○ Denotes a statistically significant difference between respondent groups

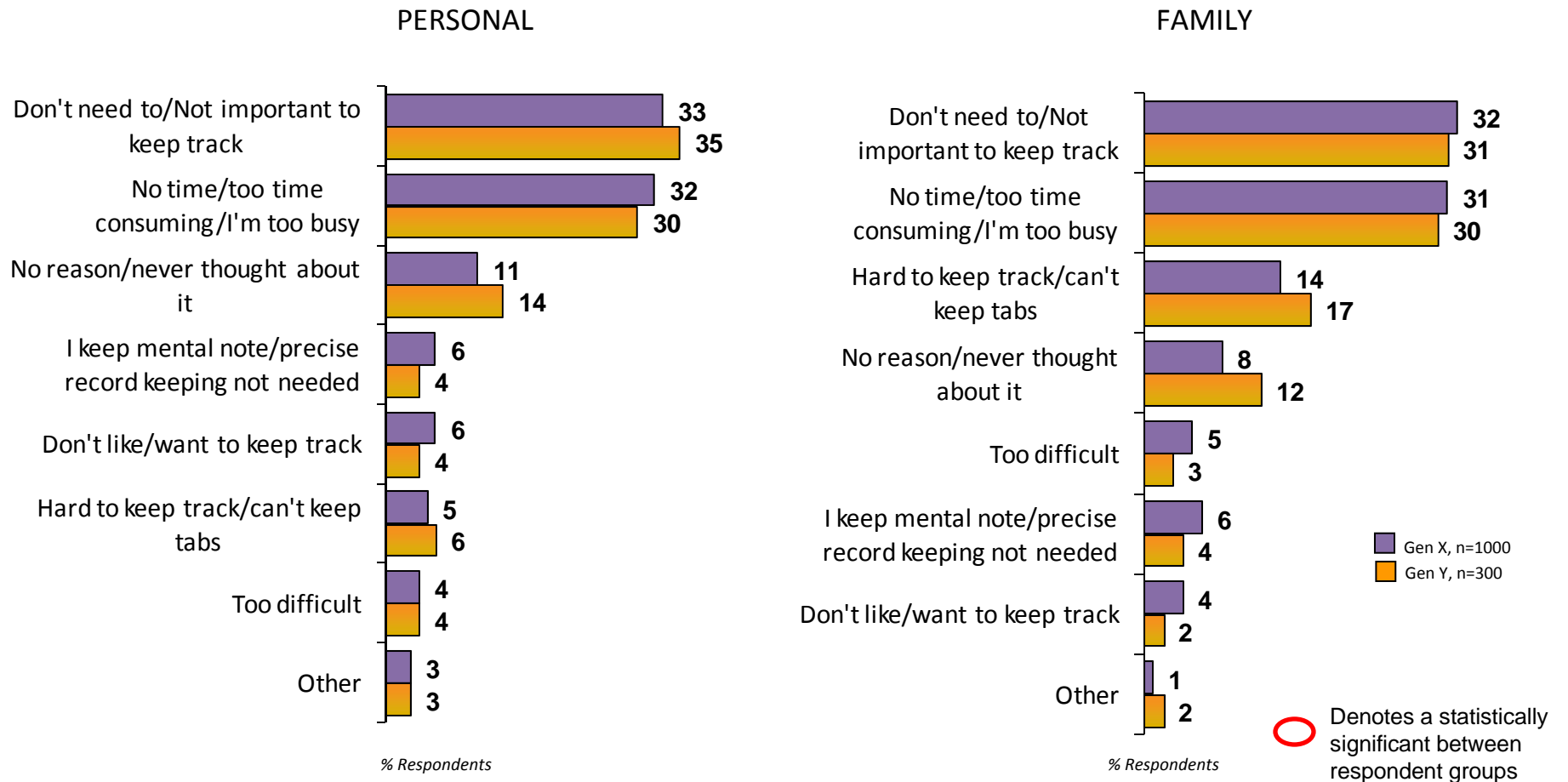
Q19. Which of the following describes how you keep track of the amount of fruits and vegetables (including fresh, frozen, canned, dried and 100% juice) that you personally are consuming?

Q21. Which of the following describes how you keep track of the amount of fruits and vegetables (including fresh, frozen, canned, dried and 100% juice) that your family are consuming?



## Lack of need and time were most often cited as the reasons for not tracking consumption

### Why don't you keep track?



Q20. Why don't you keep track of the amount of fruits and vegetables that you personally consume at all or any of your meals?

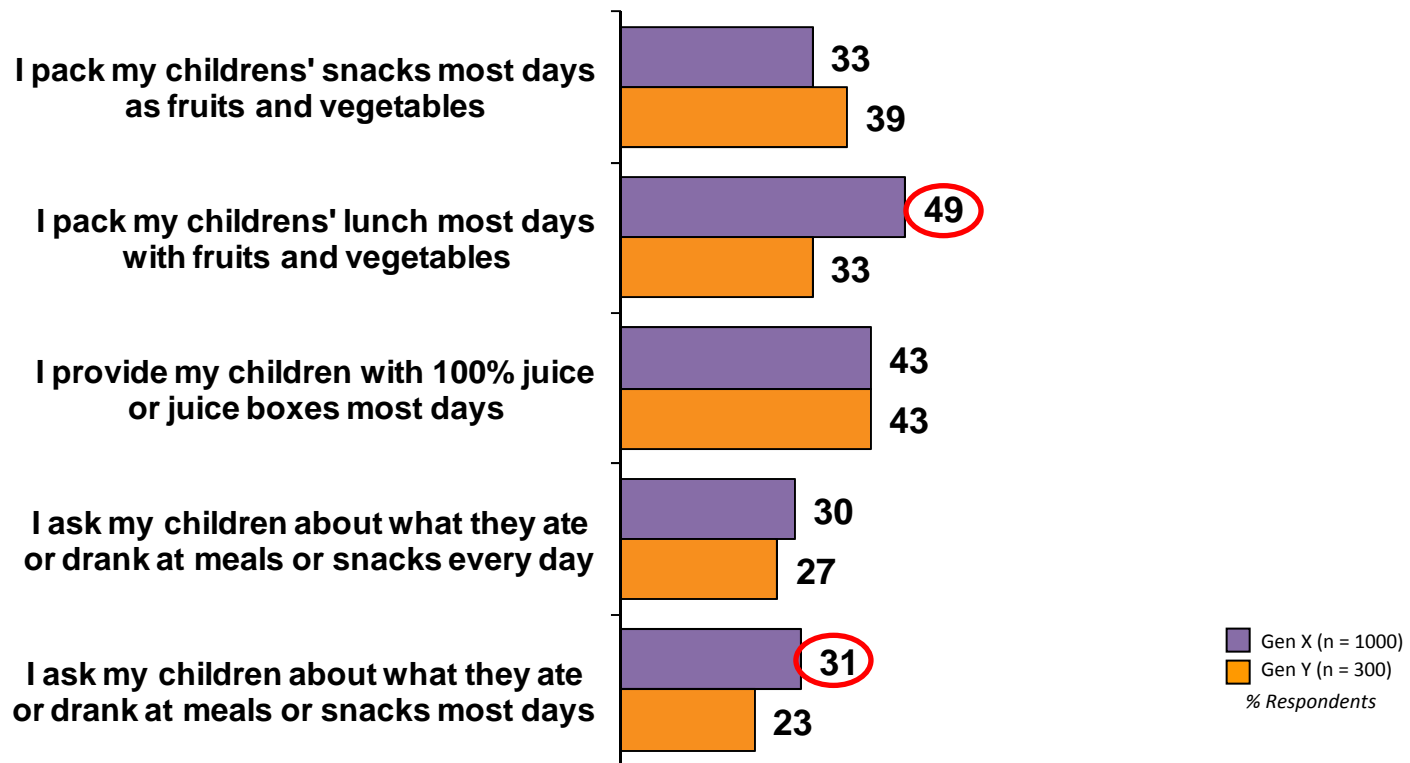
Q22. Why don't you personally keep track of the amount of fruits and vegetables that your family consumes at all or any of your family meals?




## Moms use multiple methods for tracking consumption – Gen X Moms are the most diligent



### Tracking Methods



 Denotes a statistically significant difference between respondent groups

Q23. Which of the following describes how you keep track of the amount of fruits and vegetables (including fresh, frozen, canned, dried and 100% juice) that your children are consuming away from home? (Please select all that apply)





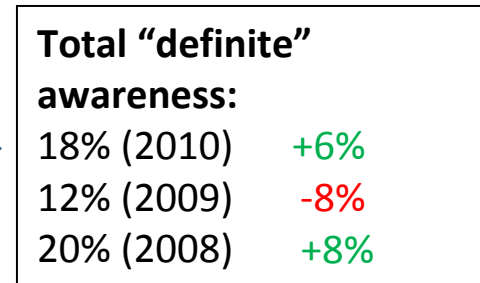
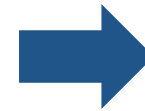
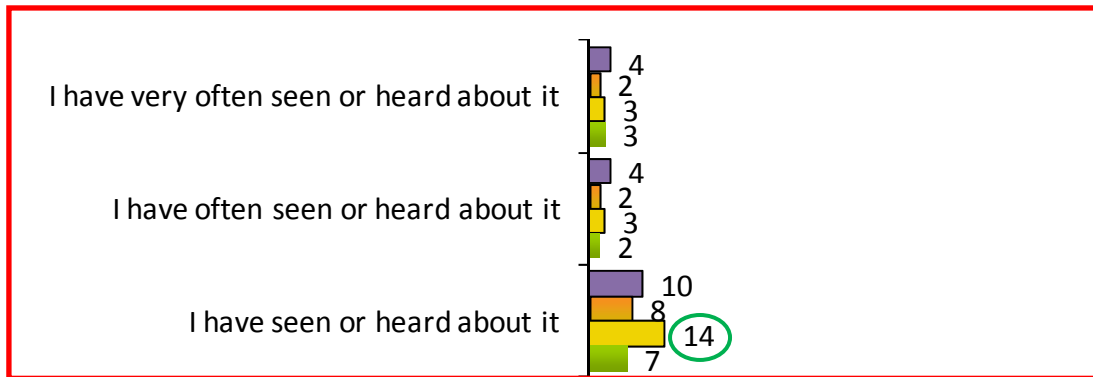
# **Campaign Awareness & Impressions**

# Awareness of the logo is slightly higher and consistent between Gen X and Gen Y Moms



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

No significant differences between Gen X and Gen Y moms (See Appendix slide 97)



■ 2010 (n = 1000)  
■ 2009 (n = 1000)  
■ 2008 (n = 1000)  
■ 2007 (n = 1000)

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

% Respondents

Q66. Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?



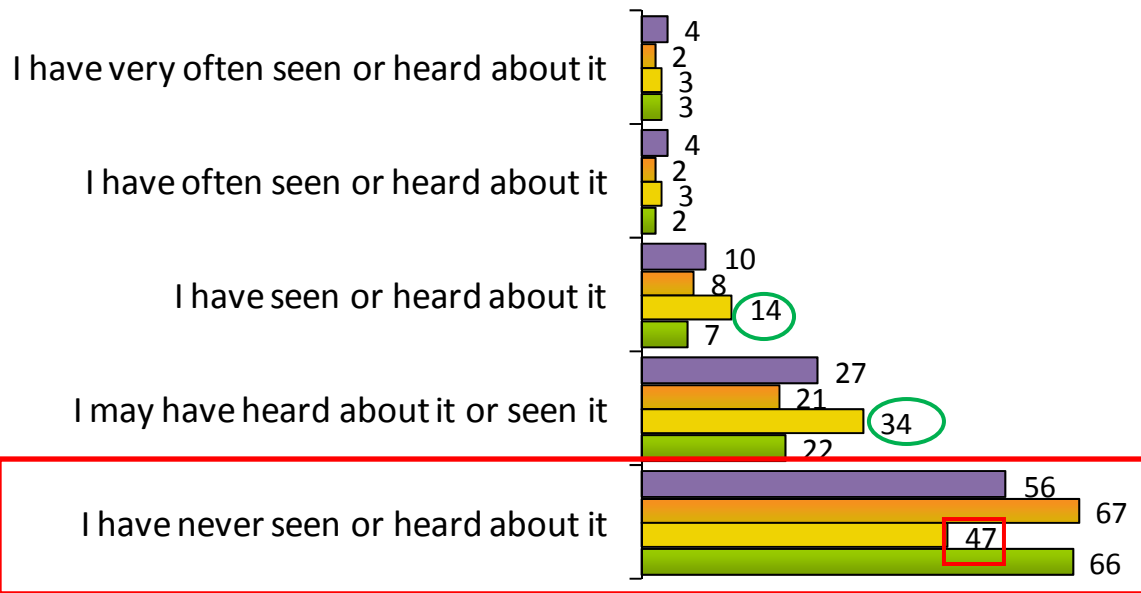


# Almost one in two (44%) Gen X and Gen Y Moms report at least some awareness of the logo



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

No significant differences between Gen X and Gen Y moms (See Appendix slide 98)



**Total possible awareness (includes those reporting "I may have heard or seen it"):**  
 44% (2010) +11%  
 33% (2009) -20%  
 53% (2008) +19%

2010 (n = 1000)  
 2009 (n = 1000)  
 2008 (n = 1000)  
 2007 (n = 1000)

○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

% Respondents

Q66. Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?

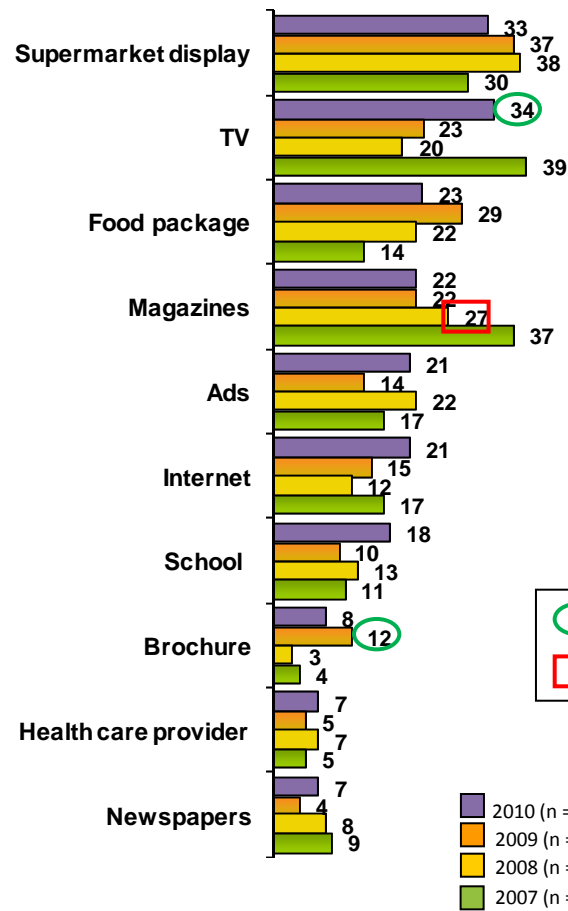


# Gen X Moms were much more likely to report seeing the logo on TV; Supermarket displays remain a key channel



How did you become familiar with the logo?

Only includes only those who have definitely seen or heard about the logo



	Secondary Channels			
	2010	2009	2008	2007
Billboard	6	5	2	2
Word of mouth	6	4	2	2
Newspapers	5	2	6	5
Government	4	4	1	0
Radio	4	1	1	3
Books	4	1	0	1
University	2	0	0	0
Church	1	0	0	0
Other	8	7	11	8

○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

% Respondents



Q67: Where did you see or hear of Fruits & Veggies—More Matters™? (Please select all that apply)

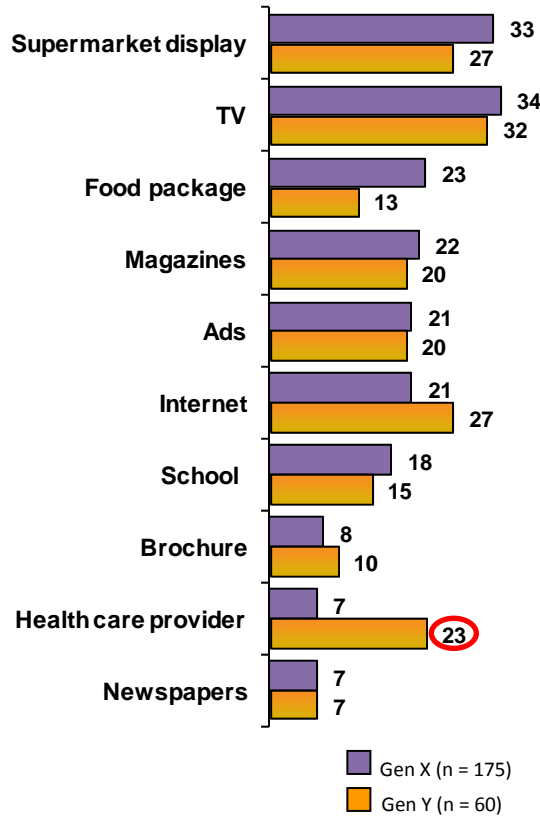
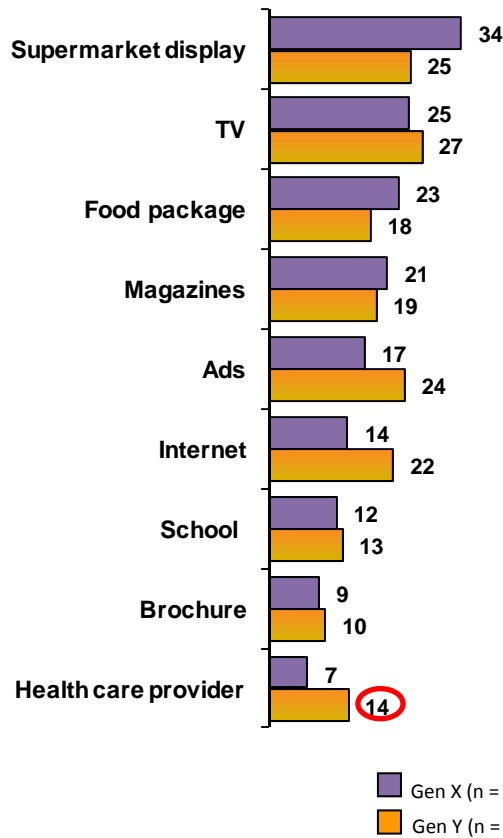
# Gen X vs. Gen Y



How did you become familiar with the logo?

Includes those who **at least may have** heard about or seen the logo

Only includes only those who have definitely seen or heard about the logo



	Secondary Channels	
	Gen X	Gen Y
Billboard	6	5
Word of mouth	6	7
Newspapers	5	5
Government	4	7
Radio	4	6
Books	4	5
University	2	1
Church	1	2
Other	8	7

○ Denotes a statistically significant difference between respondent groups

% Respondents



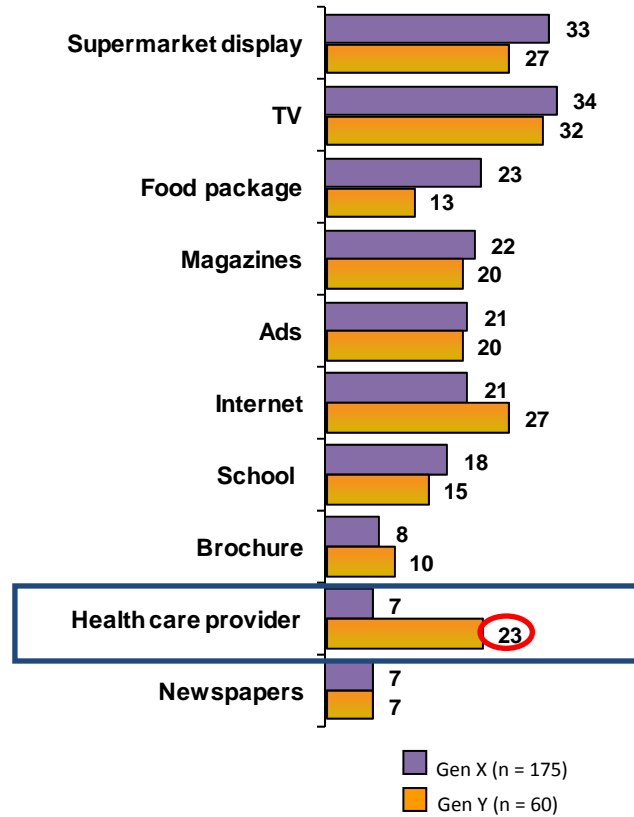
Q67: Where did you see or hear of Fruits & Veggies—More Matters™? (Please select all that apply)

# Gen Y Moms were much more likely to report seeing the logo at a Healthcare Provider



How did you become familiar with the logo?

Only includes only those who have definitely seen or heard about the logo



	Secondary Channels	
	Gen X	Gen Y
Billboard	6	5
Word of mouth	6	7
Newspapers	5	5
Government	4	7
Radio	4	6
Books	4	5
University	2	1
Church	1	2
Other	8	7

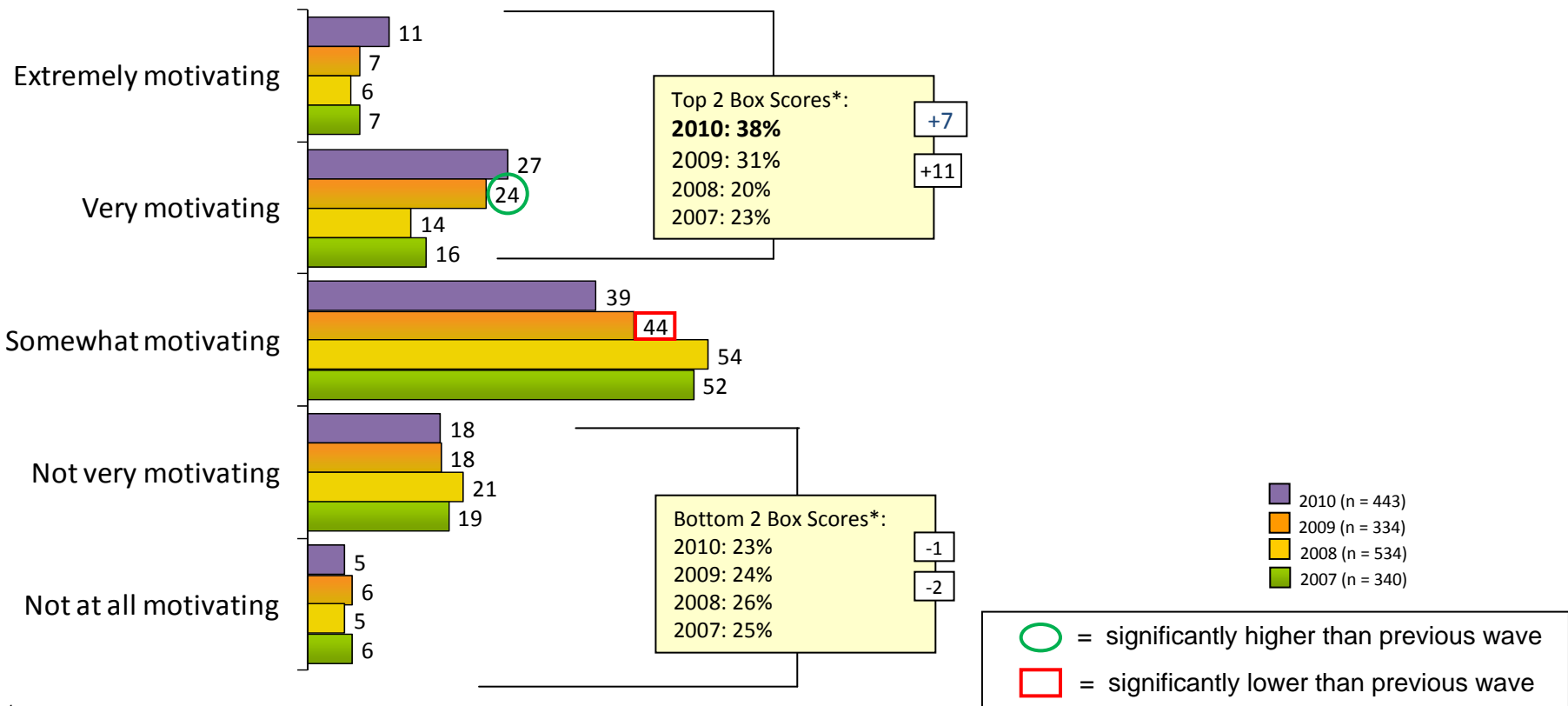
○ Denotes a statistically significant difference between respondent groups

% Respondents

# Amongst Gen X Moms, the logo was equally likely to motivate behavior as in the prior year



How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?  
(base: only those who were aware of the logo)



% Respondents

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

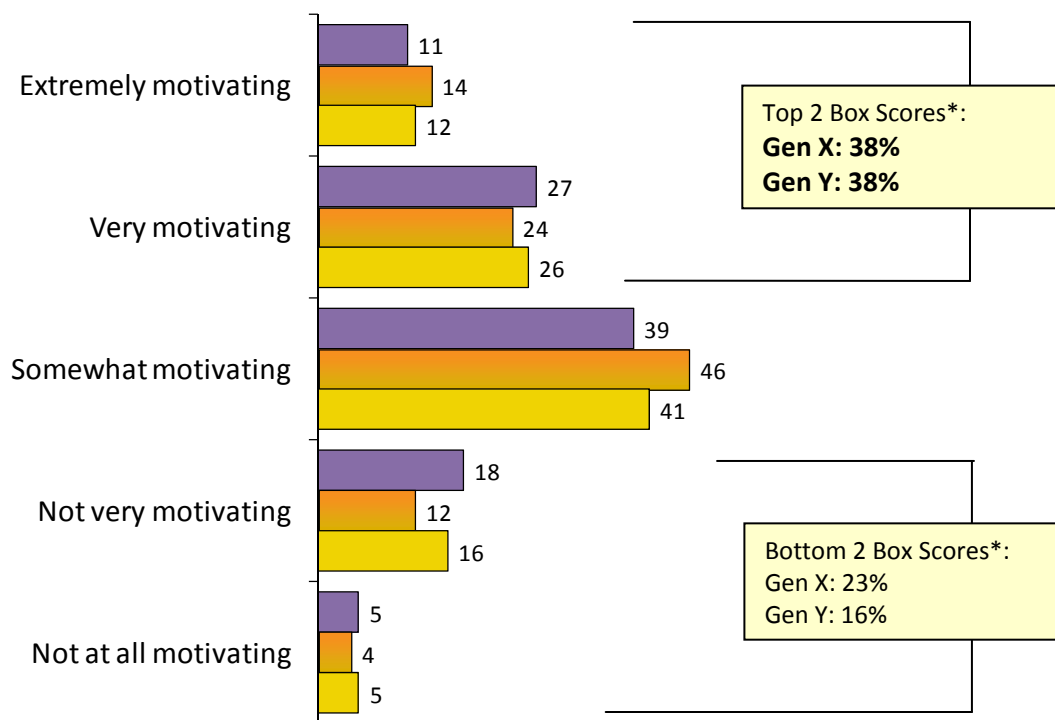


Q68. How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?

## Gen Y Moms were equally likely to be motivated



How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?  
(In 2010, only asked to those aware of logo)



% Respondents

■ Gen X, n=443  
■ Gen Y, n=136  
■ Total, n=579

○ Denotes a statistically significant difference between respondent groups

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



Q68. How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?

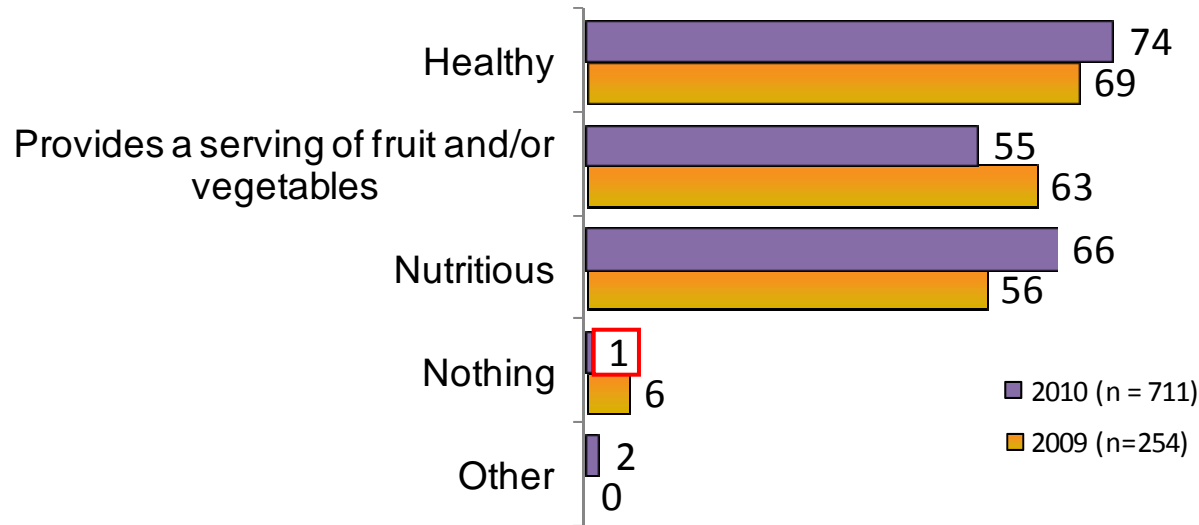
# Gen X Moms were slightly more likely to identify a brand association



## Logo Brand Association

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

No significant differences between Gen X and Gen Y moms (See Appendix slide 99)



○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

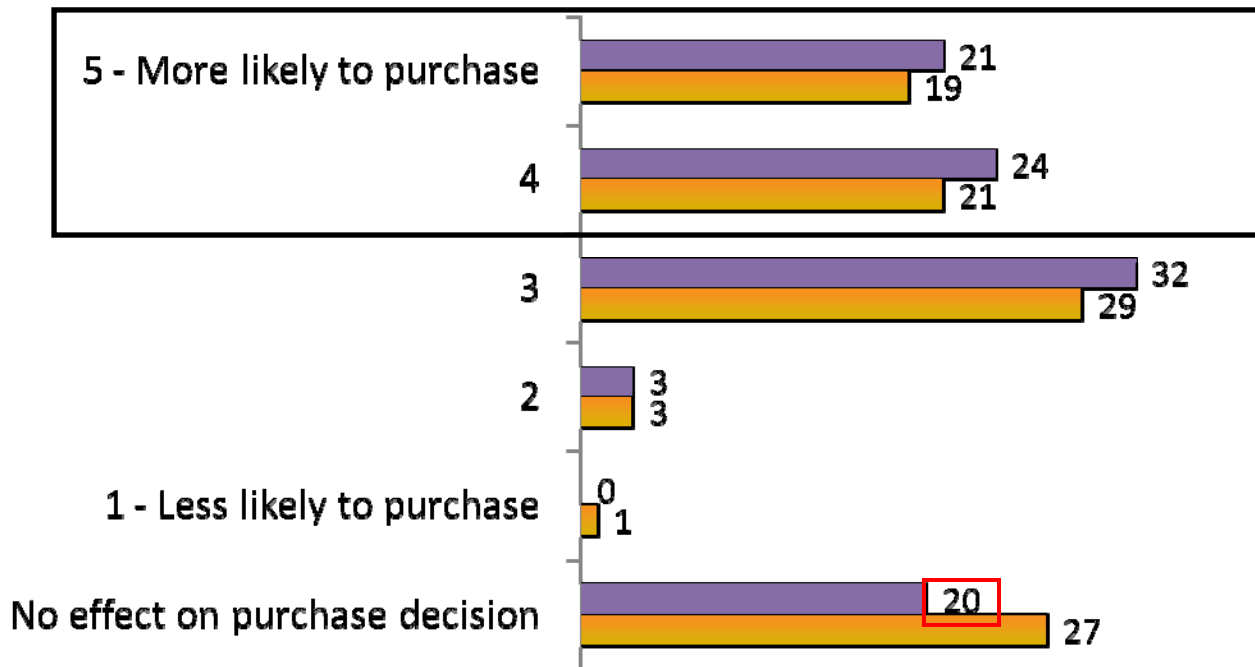
% Respondents

Q70. If you see the More Matters™ logo on a product, what does it say to you about the product?

# The logo also had a more positive influence on the purchase decision amongst Gen X Moms, particularly those who are more physically active . . .



Logo Purchase Influence



Top 2 box score\*:  
 2010: 45%  
 2009: 40%  
 +5%

Level of daily physical activity  
 < 30 mins: 34%  
 30-60 mins: 55%  
 >60 mins: 67%

■ 2010, n=1000  
 ■ 2009, n=1000

○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

% Respondents

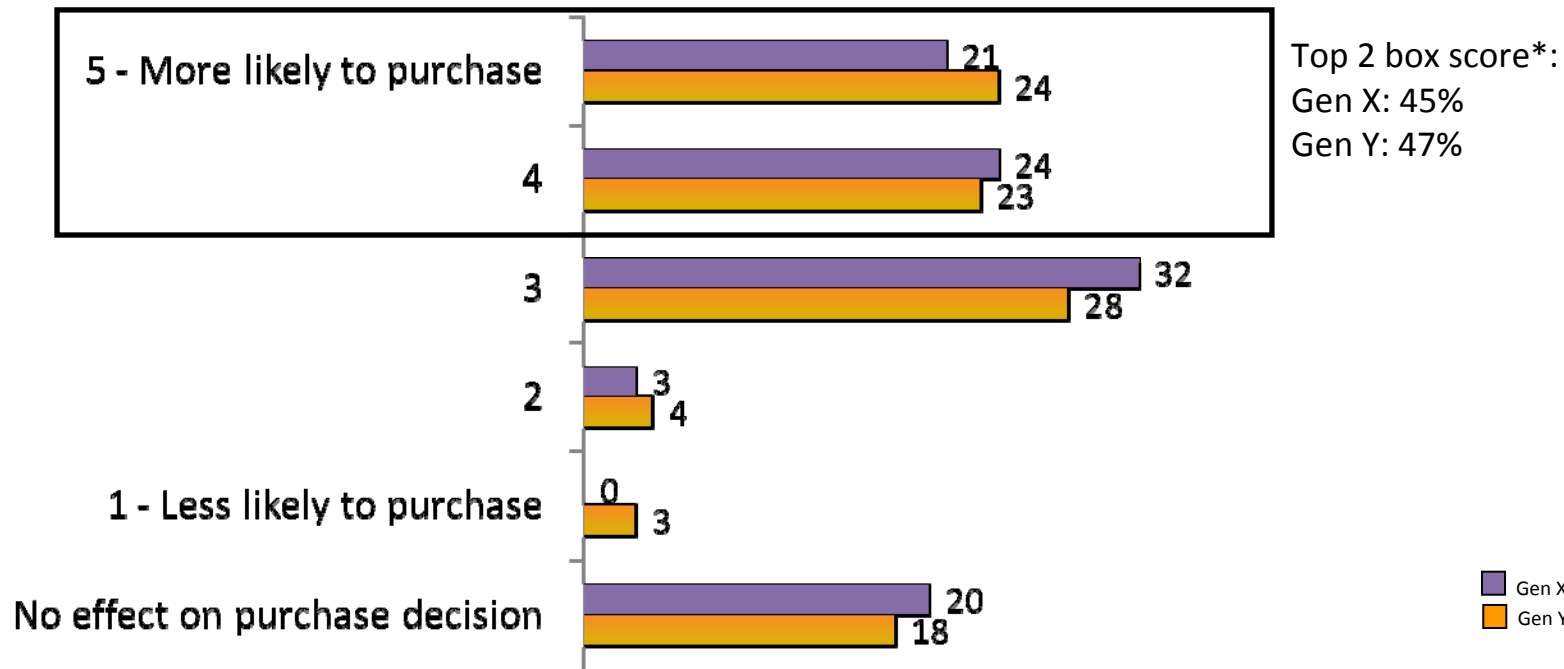
\*Top 2 box score reflects the total score of respondents who answered 4 or 5



... and was equally likely to influence Gen Y Mom's purchase decision



Logo Purchase Influence



■ Gen X, n=1000  
 ■ Gen Y, n=300

○ Denotes a statistically significant difference between respondent groups

% Respondents

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

Q71 . How does seeing the "Fruits & Veggies - More Matters" logo affect your decision to purchase the product?

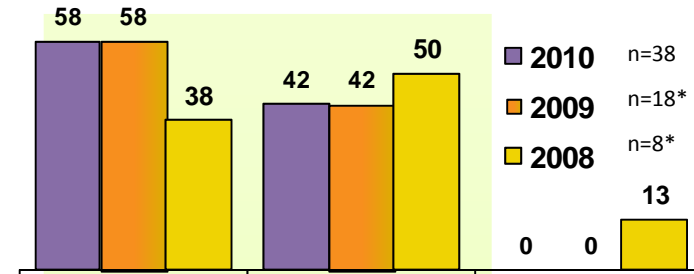
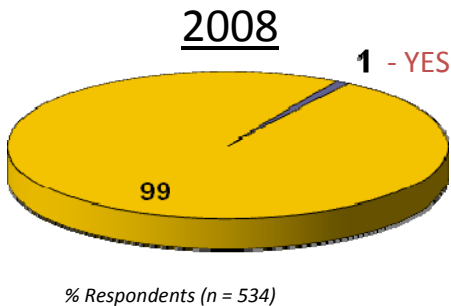
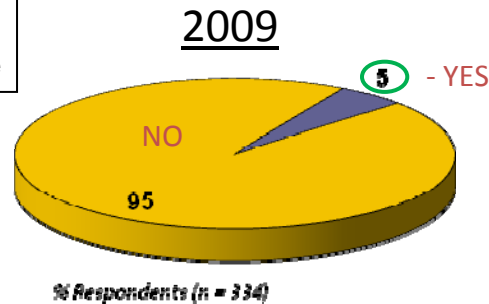
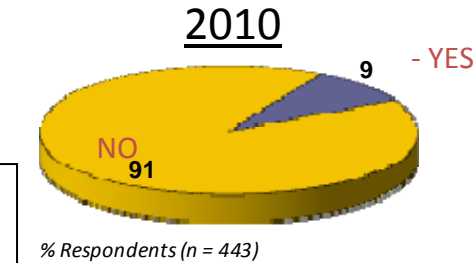


# Website metrics (visits, content satisfaction) remained consistent with the previous year and were similar for both Gen X and Gen Y Moms

Have you visited [www.fruitsandveggiesmorematters.org](http://www.fruitsandveggiesmorematters.org)?

Did you find the information you were looking for?

○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

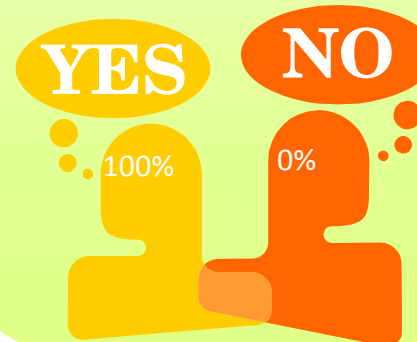


I found all the information I was looking for  
 I found some of the information I was looking for  
 No, I did not find the information I was looking for

% Respondents  
 \*CAUTION: Small sample base

No significant differences between Gen X and Gen Y moms (See Appendix slide 102)

Did you use the information you obtained from the site?

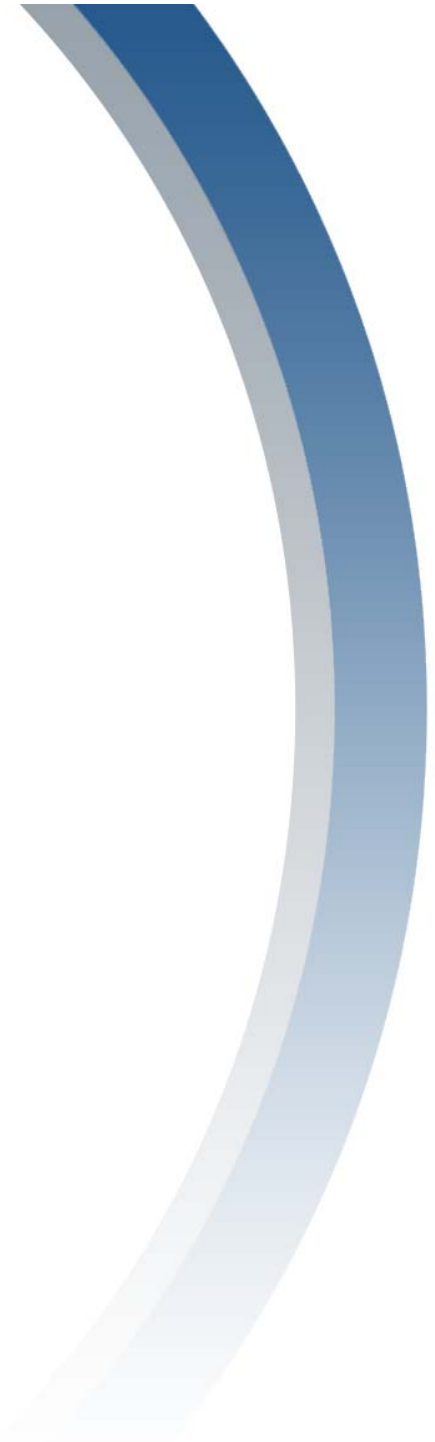


2010, 2009 & 2008  
 n=38 n=18\* n=8\*

% Respondents  
 \*CAUTION: Small sample base

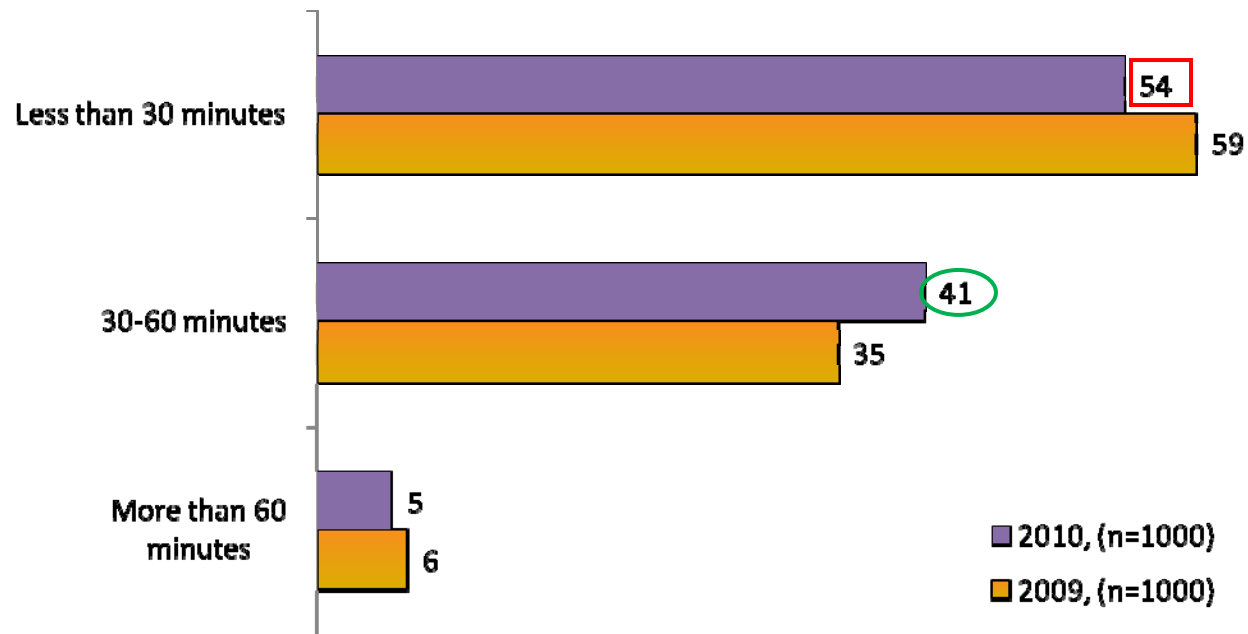
- Q72. Have you visited [www.fruitsandveggiesmorematters.org](http://www.fruitsandveggiesmorematters.org)?
- Q73. Did you find the information you were looking for?
- Q74. Did you use the information you obtained from the site?

**Benefits**



## Moms more active

*How much moderate or vigorous activity (such as brisk walking, jogging, biking, aerobics or yard work) do you engage in most days, in addition to your normal daily routine?*



% Respondents

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

Q7: How much moderate or vigorous activity (such as brisk walking, jogging, biking, aerobics, or yard work) do you engage in most days, in addition to your normal daily routine?



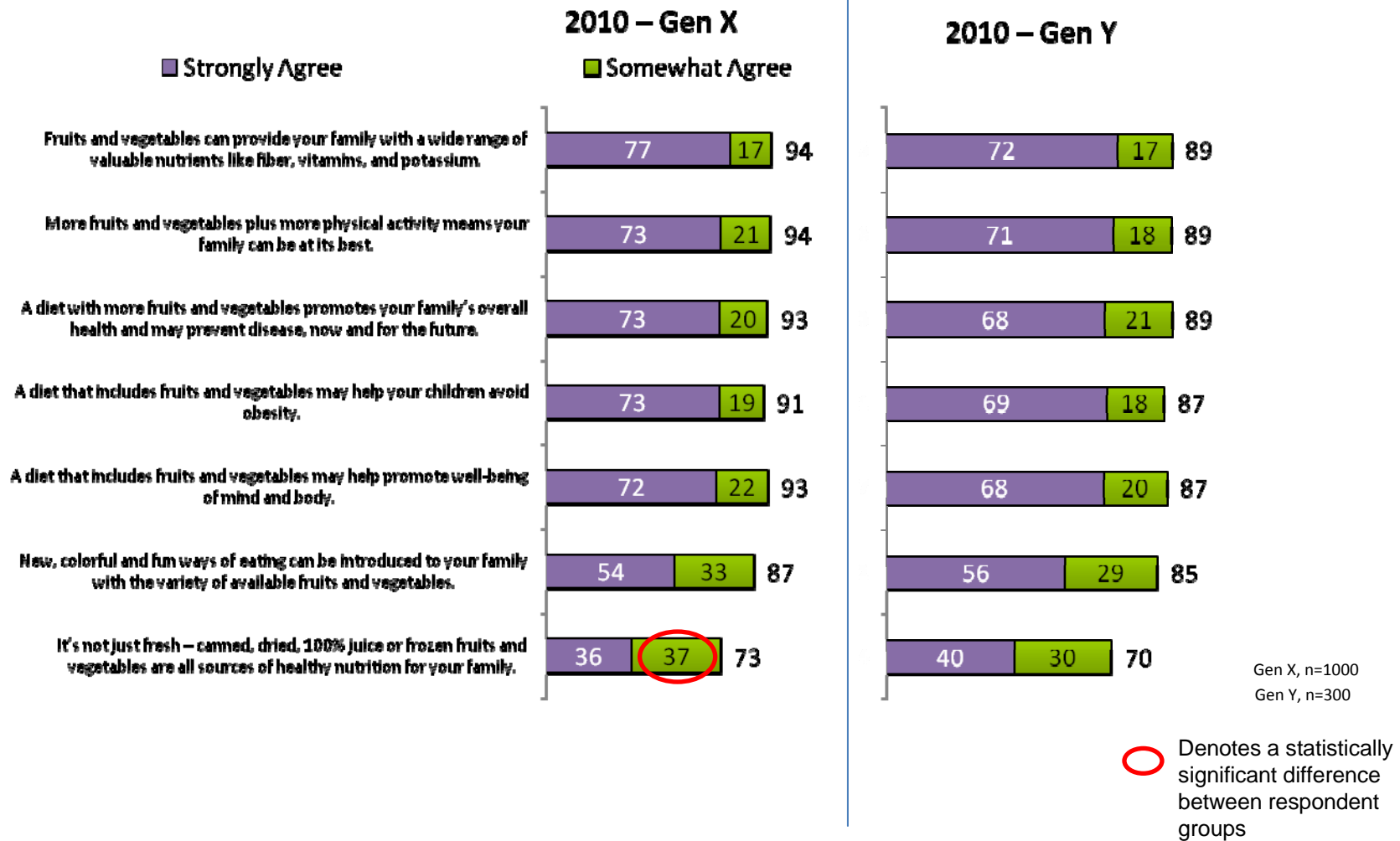
# Avoiding child obesity is significantly more important to Gen X Moms than in the previous year



○ = significantly higher than previous wave  
 □ = significantly lower than previous wave



# Gen X mom's consistently believe any type of fruit or vegetable is nutritious more often than Gen Y mom's



Q46: Please review each of the following statements and tell us your level of agreement or disagreement with each.

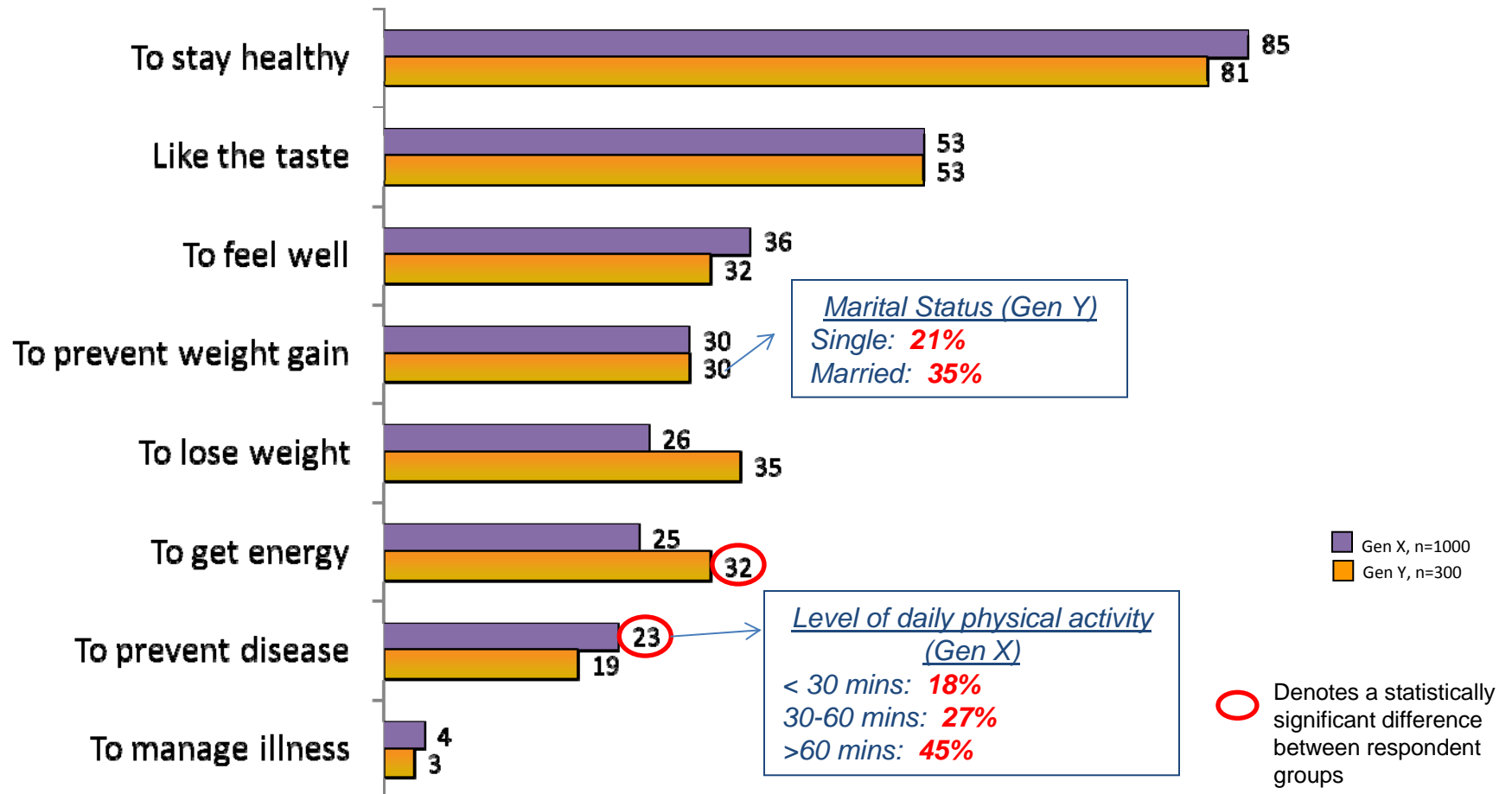




Both Gen X and Gen Y Moms cite health as the top reason they personally eat fruits and vegetables – Gen Y moms more likely to report “to get energy” while Gen X moms, especially the more physically active ones, “to prevent disease”



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



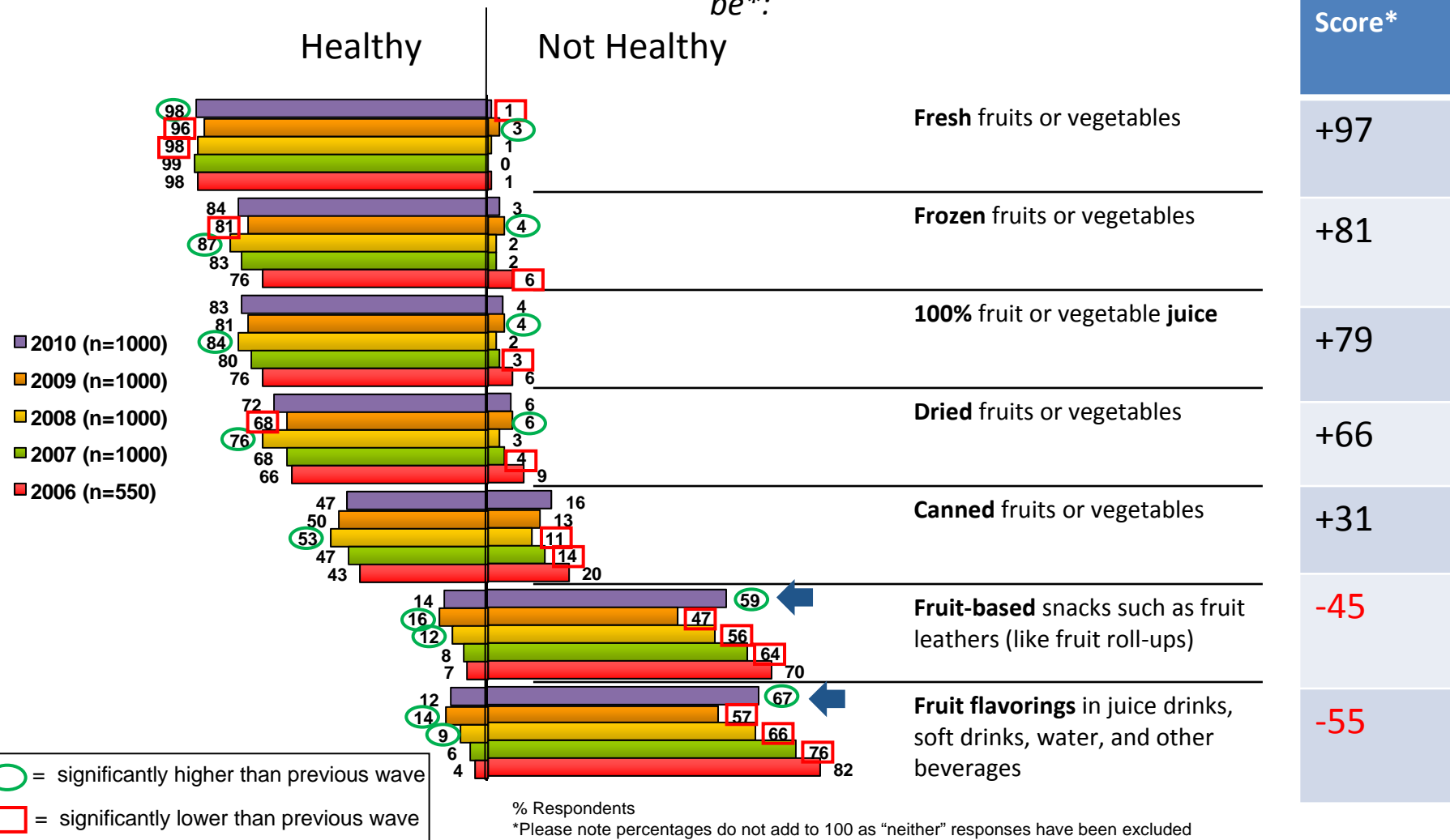
% Respondents

Q63. Please select up to three of the most important reasons why you, yourself, eat fruits and vegetables.



## Fresh fruits or vegetables continue to be perceived as the most healthy by Gen X Moms; Fruit-based snacks and flavorings are perceived as unhealthy and more so this year

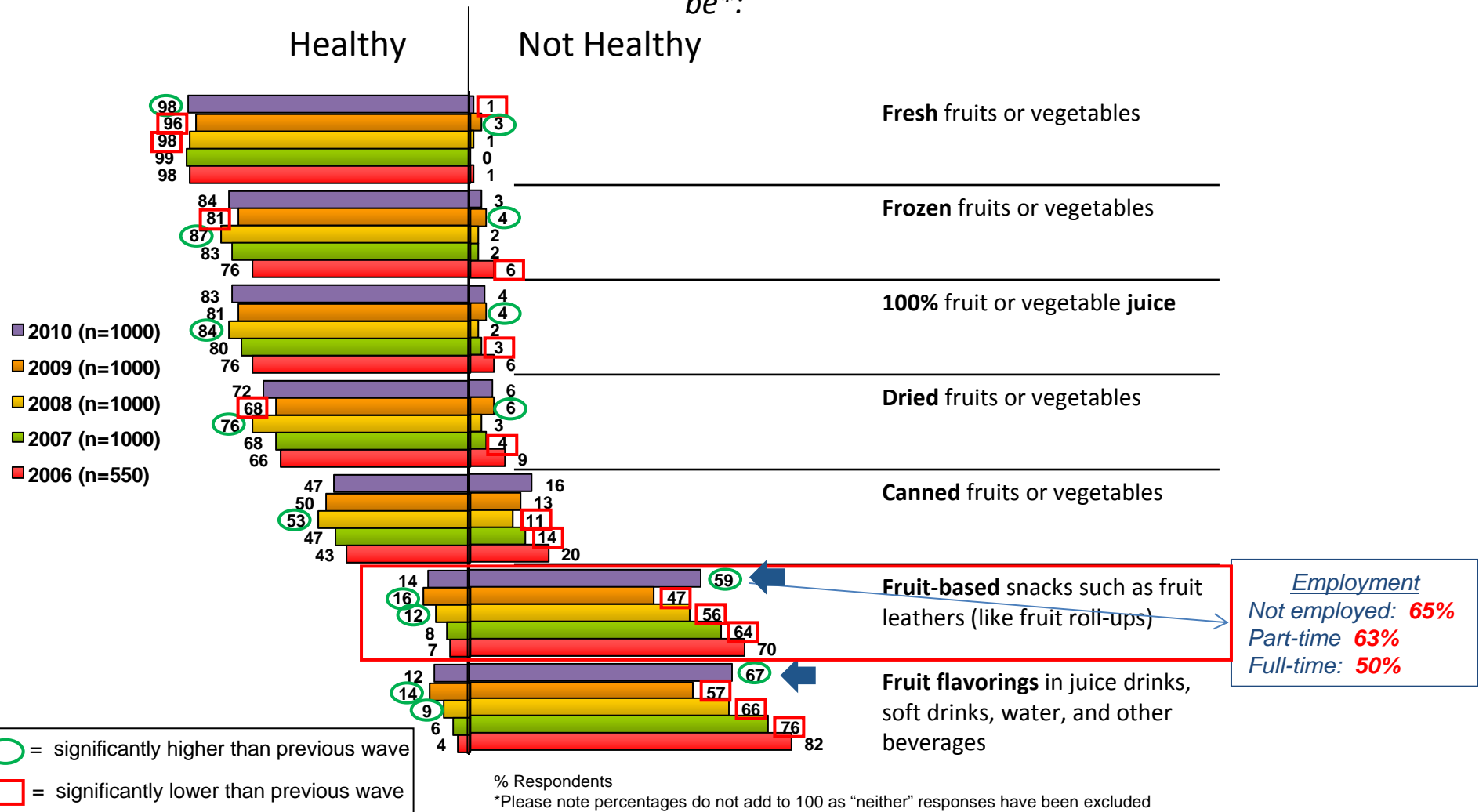
In general, how healthy do you consider the following foods to be\*:



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



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

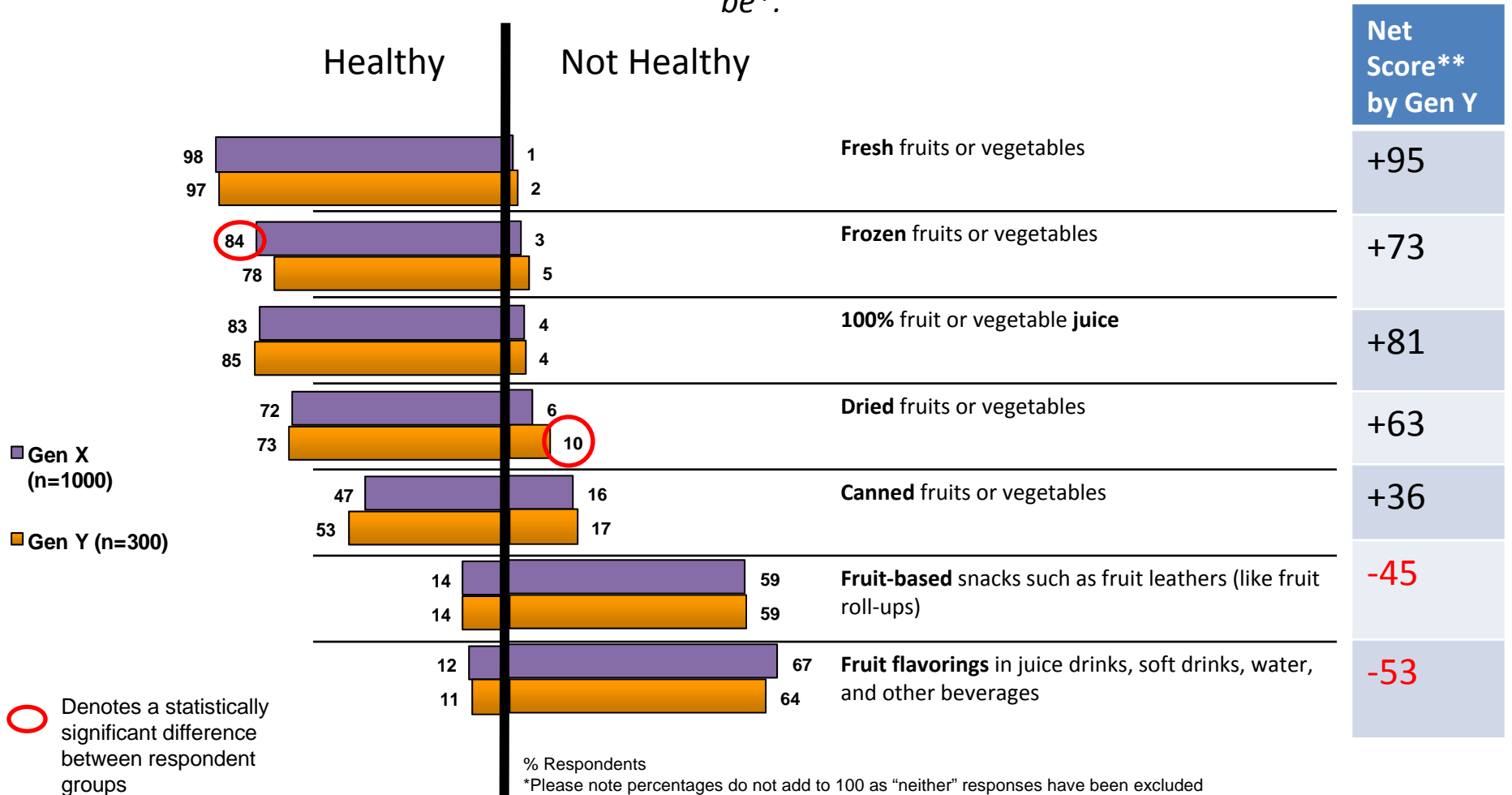


\*Net score represents % respondents who agree with the given statement less those who disagree



# Gen Y Moms are less likely to perceive frozen and dried fruits and vegetables as healthy

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

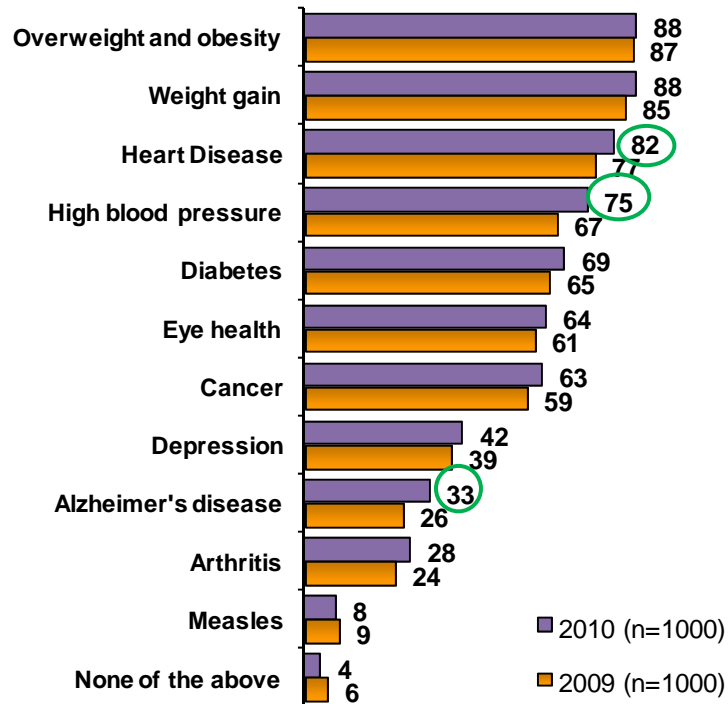


\*\*Net score represents % respondents who agree with the given statement less those who disagree

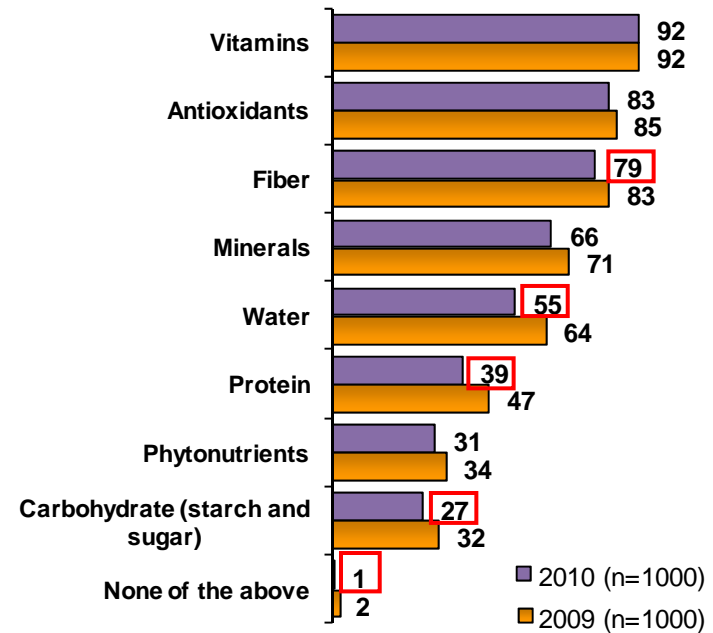


# The preventative benefits relating to heart disease and high blood pressure more likely to be cited by Gen X Moms

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



Which components may provide health benefits?



○ = significantly higher than previous wave  
 □ = significantly lower than previous wave

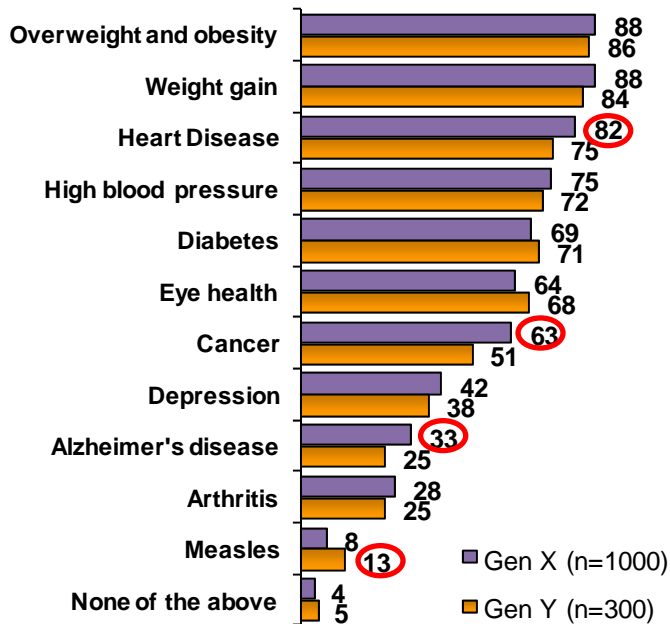
% Respondents

% Respondents

Q62: Which of the following do you believe consuming fruits and vegetables may be beneficial for preventing? (Please select all that apply)  
 Q64: Which of the following components of fruits and vegetables do you believe may provide health benefits? (Please select all that apply)

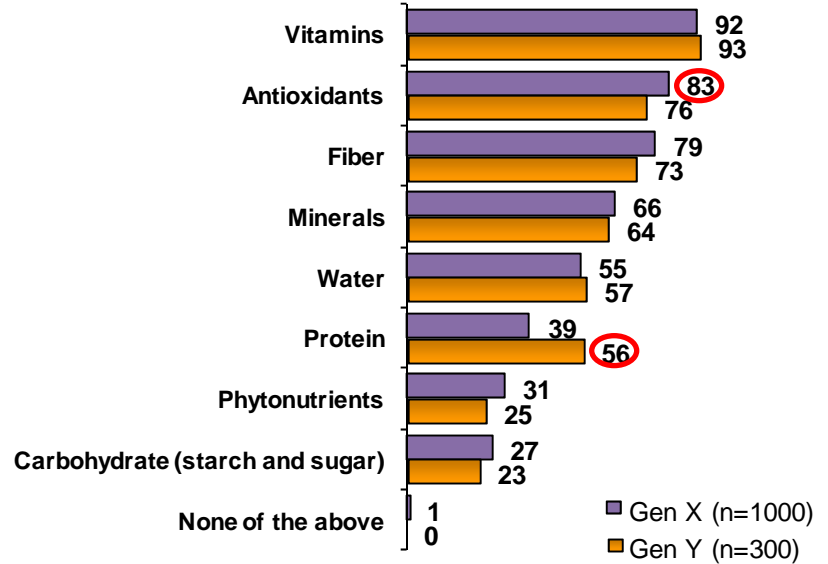
# Preventative benefits less likely to be identified by Gen Y Moms

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



% Respondents

Which components may provide health benefits?

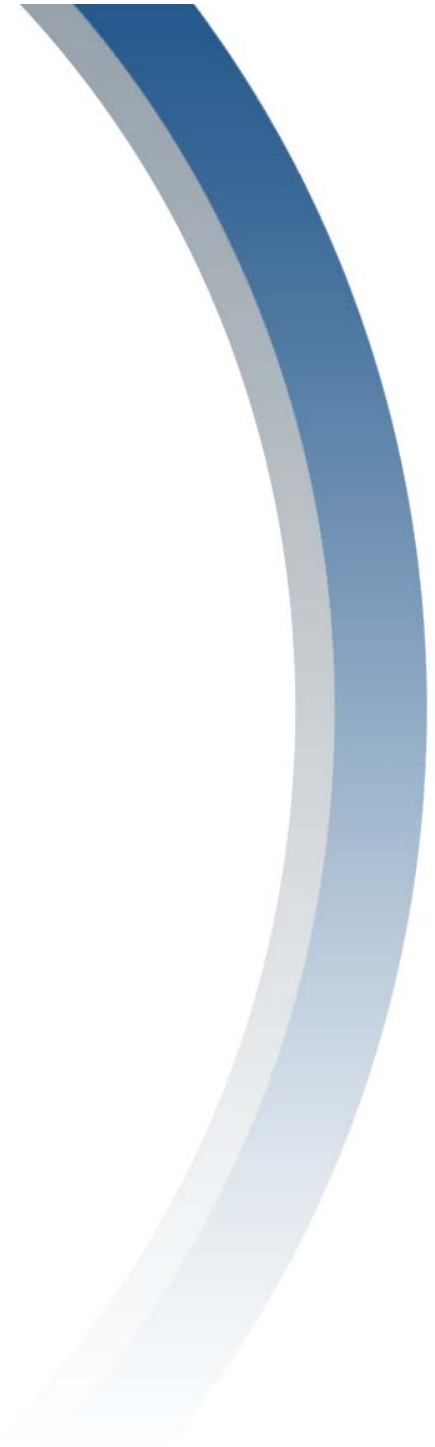


% Respondents

○ Denotes a statistically significant difference between respondent groups

Q62: Which of the following do you believe consuming fruits and vegetables may be beneficial for preventing? (Please select all that apply)  
 Q64: Which of the following components of fruits and vegetables do you believe may provide health benefits? (Please select all that apply)

# Barriers



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



% Respondents

\*Net score represents % respondents who agreed with the statement less those who disagreed with any given statement.

Q47. 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.

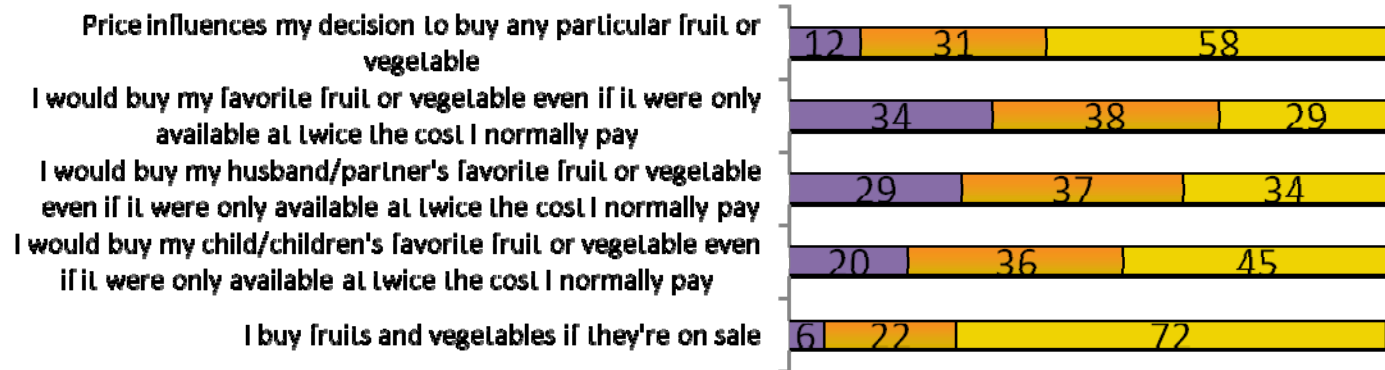


# Both Gen X and Gen Y Moms are generally price-sensitive – they make exceptions, however, when it comes to their children

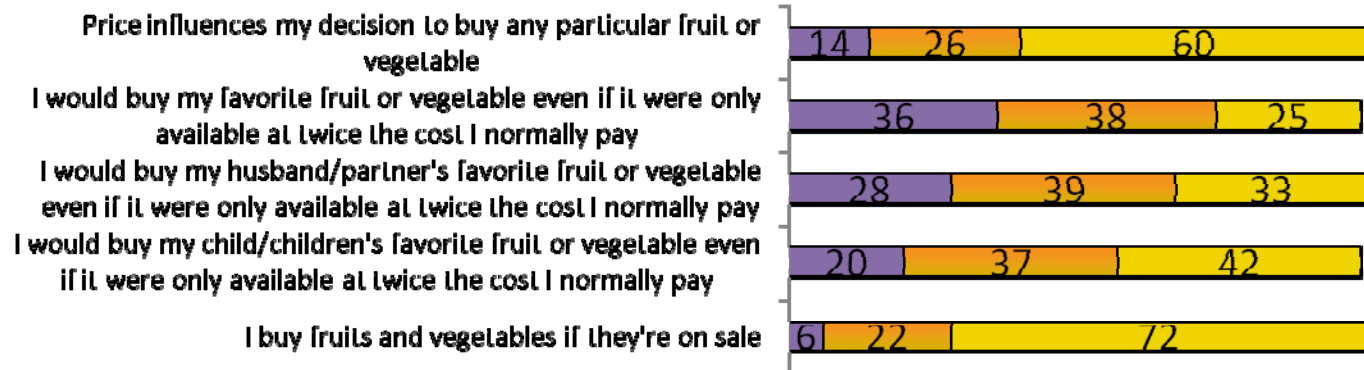


On a scale from 1 to 5 (where 1 means “never” and 5 means “always”), please rate each of the following statements:

## Gen X



## Gen Y



- Never-Rarely
- Sometimes
- Often-Always

Gen X, n=1000  
Gen Y, n=300

○ Denotes a statistically significant difference between respondent groups

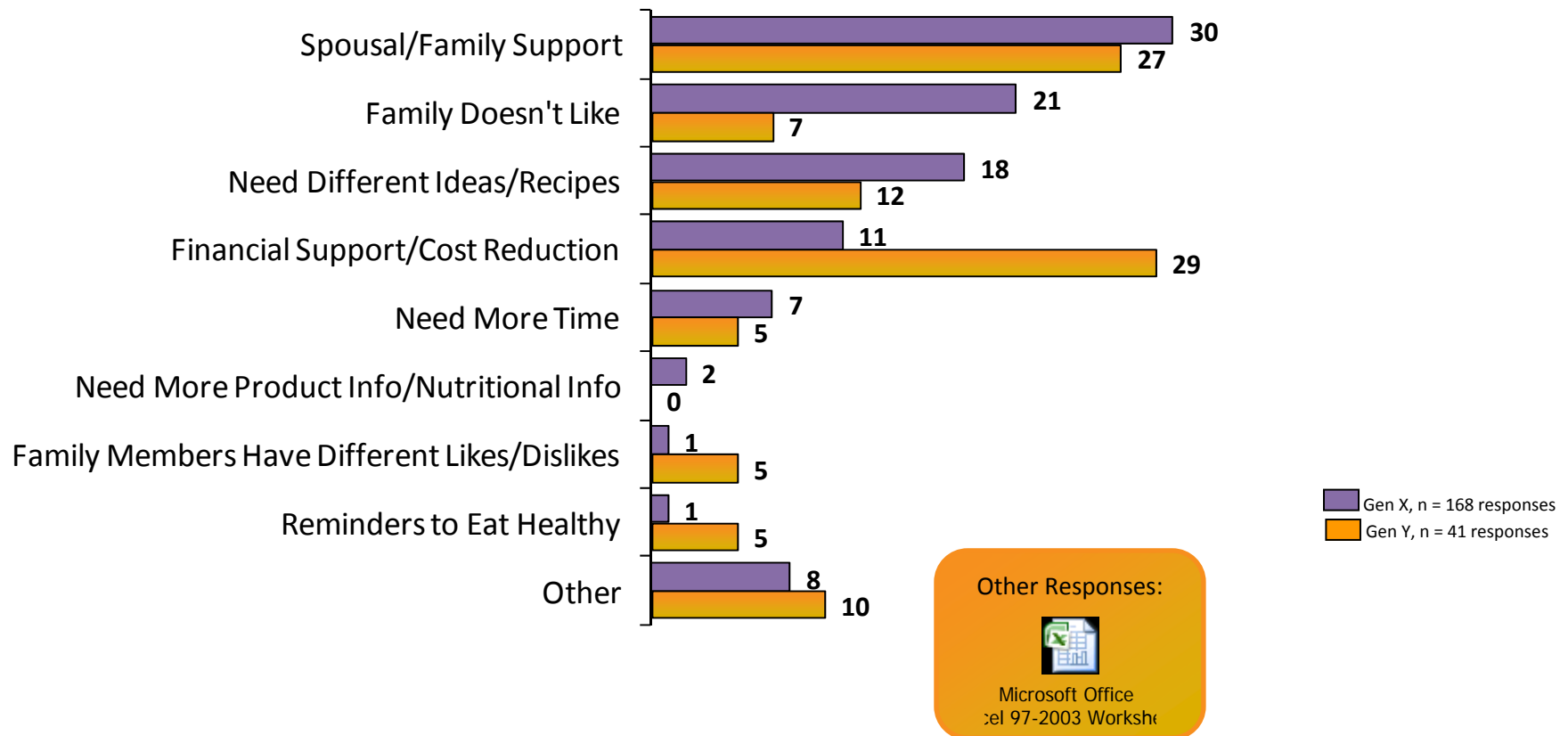
% Respondents

\*Net score represents % respondents who would “often-always” agree with the given statement less those who replied “never-rarely”

Q38. On a scale from 1 to 5 (where 1 means “never” and 5 means “always”), please rate each of the following statements.



*What type of support don't you receive to include more fruits & veggies?*



*% Respondents.* Only asked to those who responded "yes" in previous question: I do not have the support I need to include more fruits and vegetables in my family's meals and snacks.

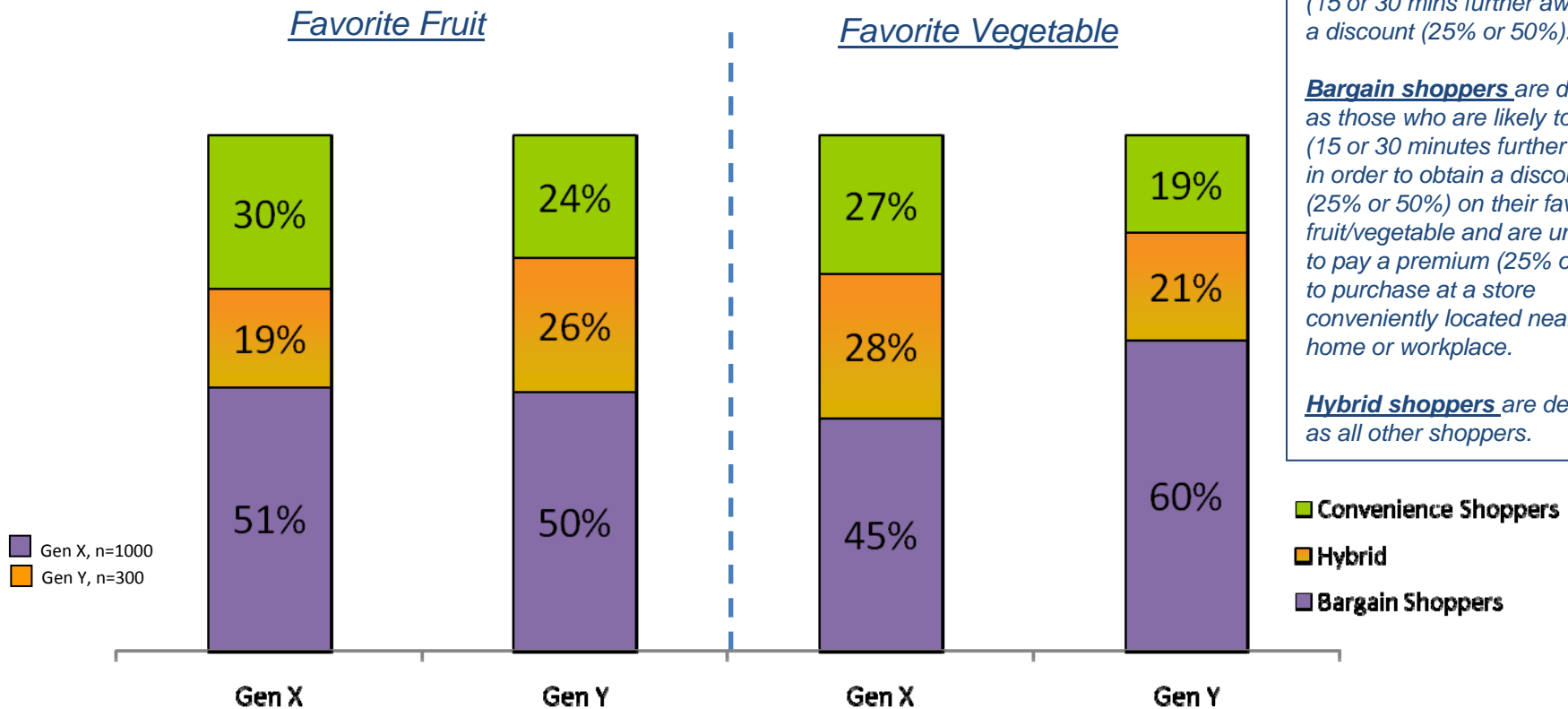
Q45. *What type of support don't you receive that you need to be able to include fruits and vegetables in your family's meals and snacks? (open-ended question)*





When thinking of their favorite fruit or vegetable, about half of all Moms tend to be Bargain shoppers. Gen X moms are more likely to purchase based on Convenience – *willing to pay a premium if a store is located close to their home or workplace*

### Segmentation – Convenience vs. Bargain Shoppers



**Convenience shoppers** are defined as those who are likely to pay a premium (25% or 50%) to purchase their favorite fruit/vegetable at a store located close to their home or workplace and unlikely to travel (15 or 30 mins further away) for a discount (25% or 50%).

**Bargain shoppers** are defined as those who are likely to travel (15 or 30 minutes further away) in order to obtain a discount (25% or 50%) on their favorite fruit/vegetable and are unlikely to pay a premium (25% or 50%) to purchase at a store conveniently located near their home or workplace.

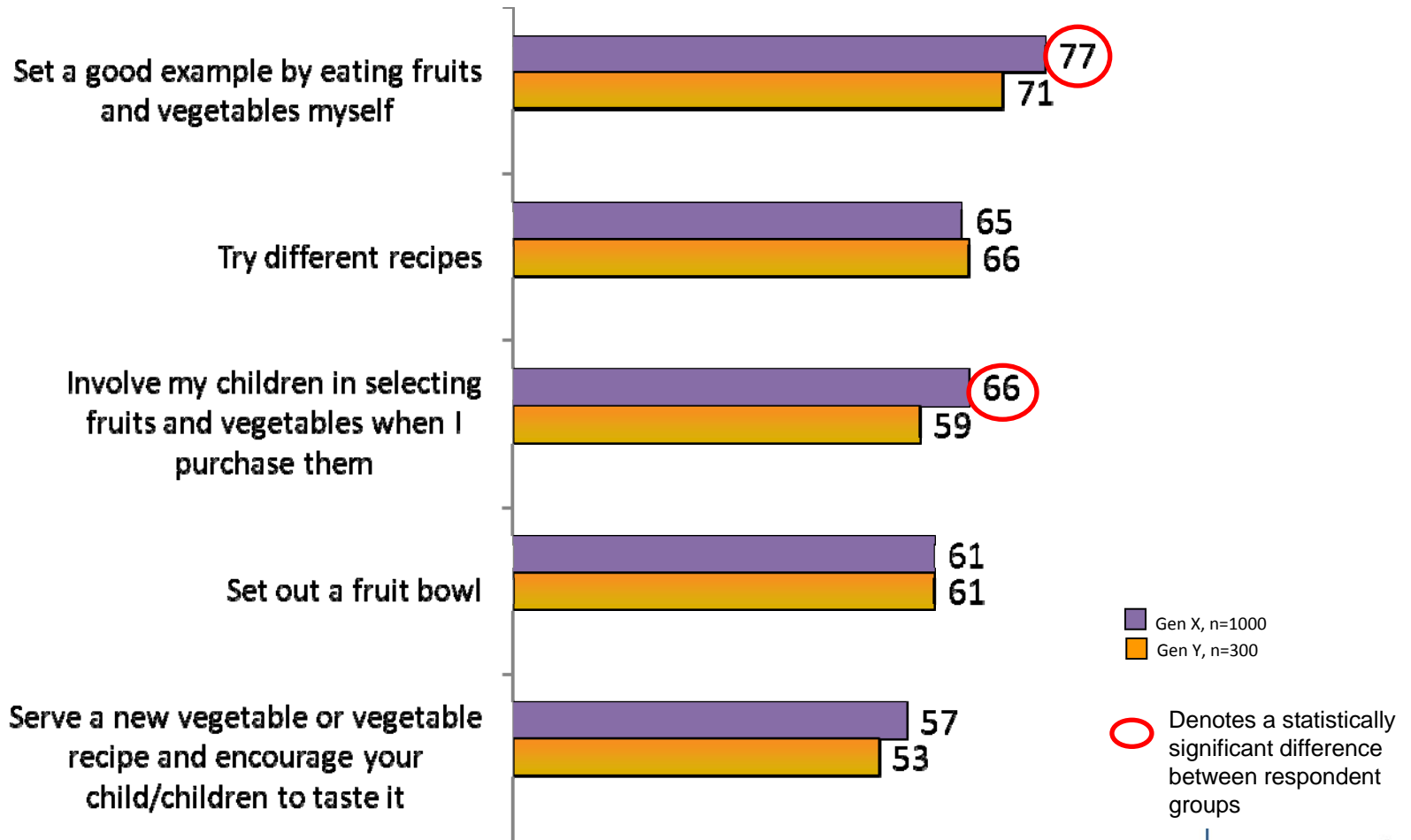
**Hybrid shoppers** are defined as all other shoppers.

Q56. On a scale from 1 to 5 ( 1 being “extremely likely” and 5 being “extremely unlikely”), how likely are you to purchase <dynamic display Q54> under the following circumstances: “A store selling <dynamic display Q54 (open-ended question)> is conveniently close to my home or workplace but the price is <50%> higher than the regular price I normally pay.”

Q57. A store selling <dynamic display Q54 (open-ended question)> is located 30 minutes further away but the price is 50% lower than the regular price I normally pay.



*Which of the following approaches have you tried to encourage your family to eat more fruits and vegetables?*



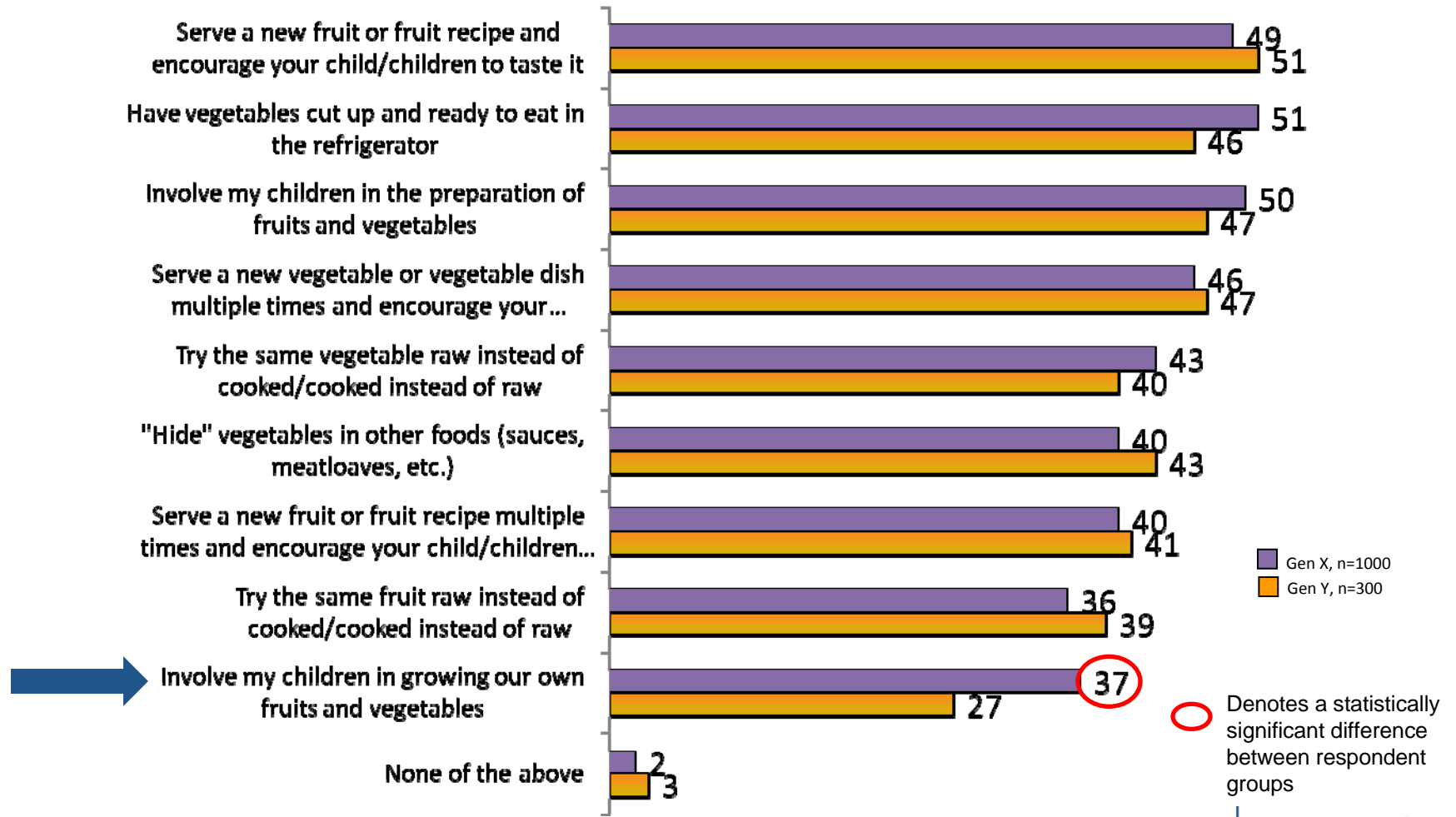
% Respondents

Q48. Which of the following approaches have you tried to encourage your family to eat more fruits and vegetables? (Select all that apply)

## ... Gen X Moms more likely to have tried involving their children in growing their own



*Which of the following approaches have you tried to encourage your family to eat more fruits and vegetables?*



% Respondents

# Setting out a bowl of fruit was the most successful reported approach – Gen Y Moms generally report being more successful



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?

Base: Total Answering (Those who selected the response option in Q48)



For both Gen X and Gen Y Moms, success was largely correlated to level of physical activity of the mom – more physically active moms were more likely to report higher success rates. Also, full-time working Gen X moms tend to be more successful than not employed/part-time counterparts.

■ Very Successful  
 ■ Somewhat Successful  
 ■ Not Successful

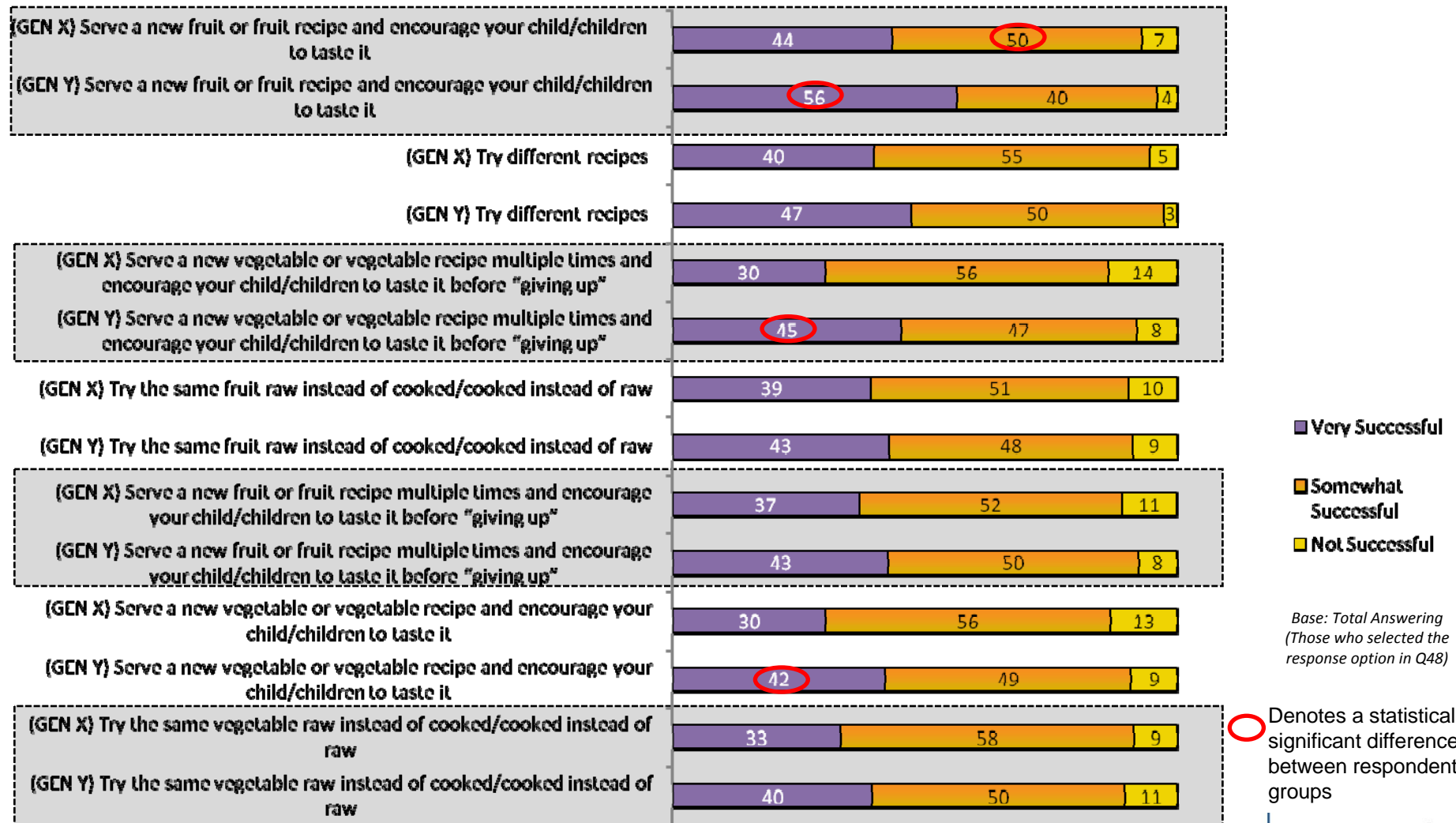
○ Denotes a statistically significant difference between respondent groups

% Respondents

Q51. 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?

## Setting out a bowl of fruit was the most successful reported approach – Gen Y Moms generally report being more successful

*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?*



Base: Total Answering  
(Those who selected the response option in Q48)

% Respondents

Q51. 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?

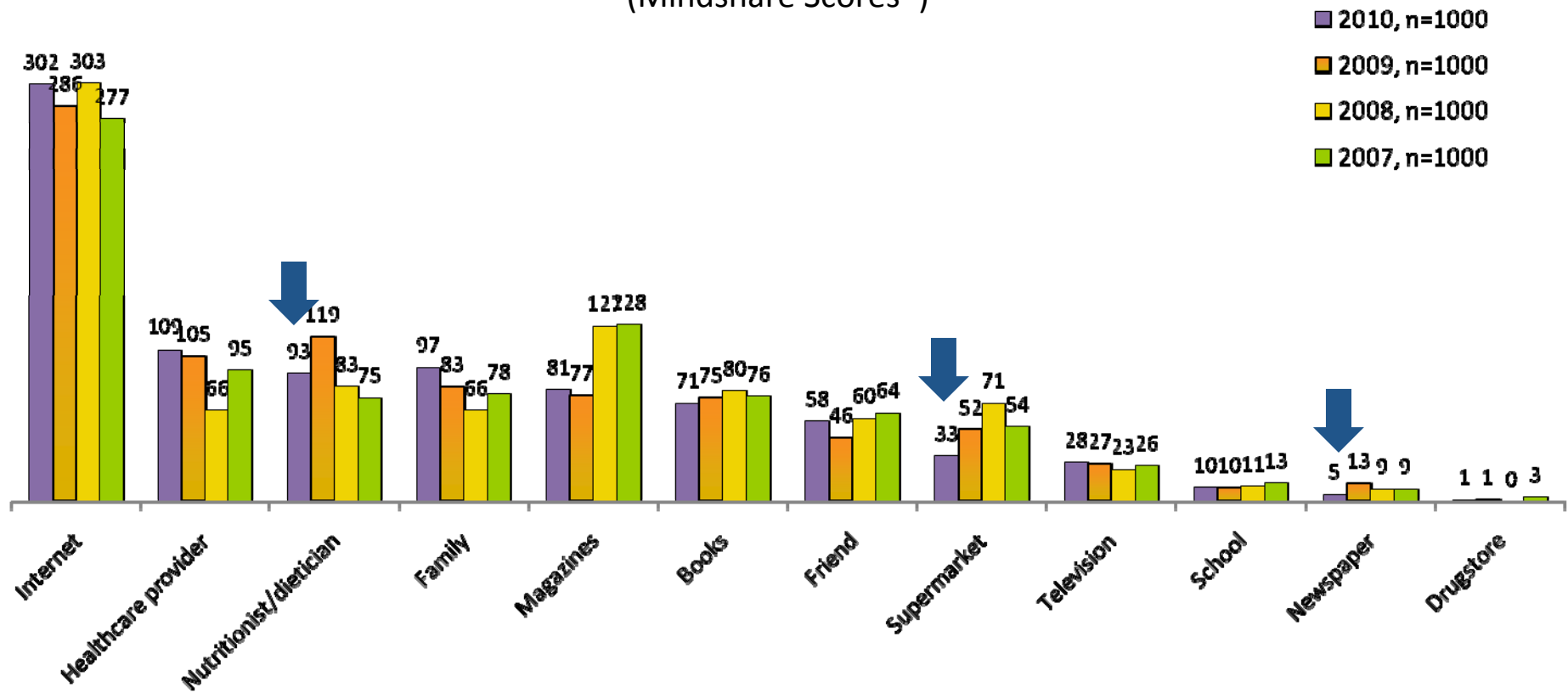
# Communications





# Gen X Moms, by far, most likely to consult the Internet; less likely this year to consult nutritionists, supermarkets and newspapers

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



\*Mindshare Score: Additive score where each first mention garners five points, each second mention garners three points and each third mention garners a single point.

Q65. 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

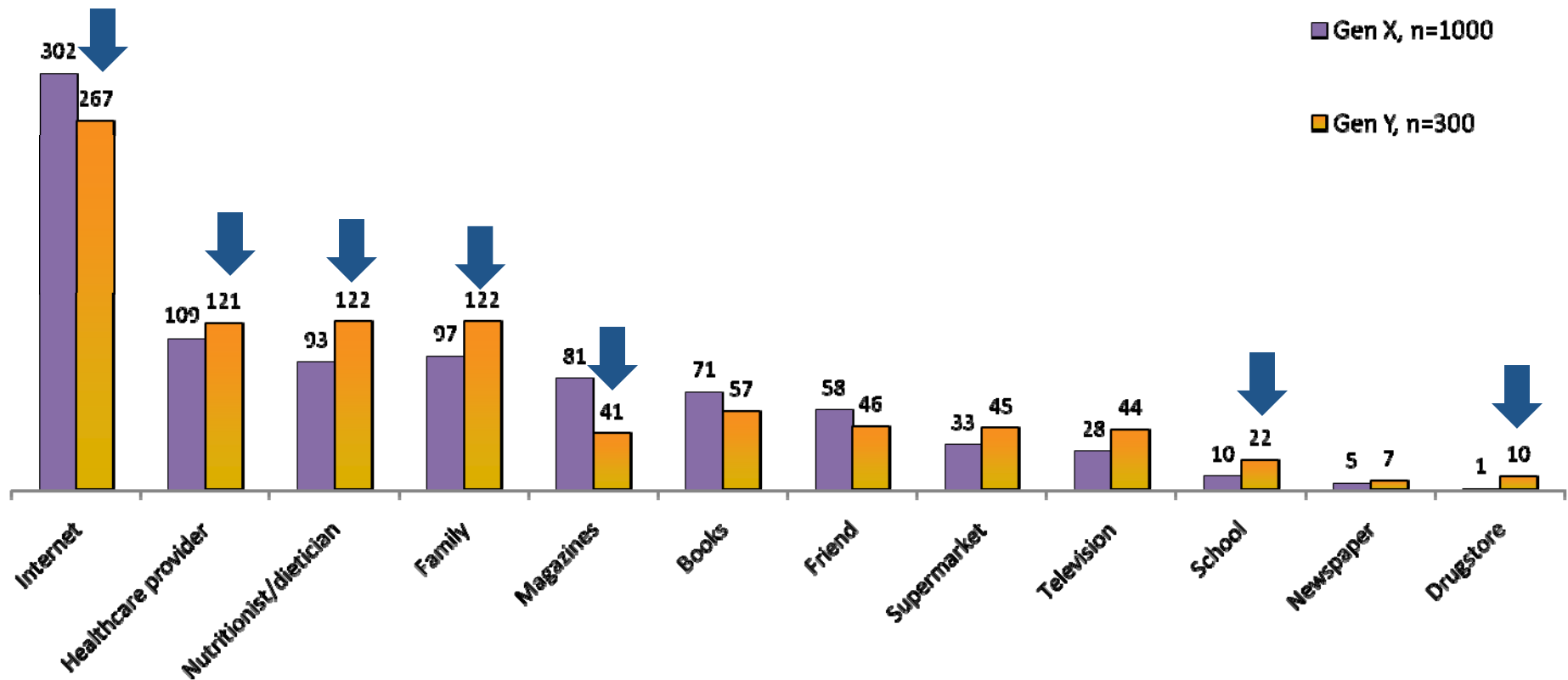




## The Internet is also the preferred source for Gen Y Moms but to a lesser degree – these moms are more likely to consult individuals

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



Mindshare Score: Additive score where each first mention garners five points, each second mention garners three points and each third mention garners a single point.

Q65. 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

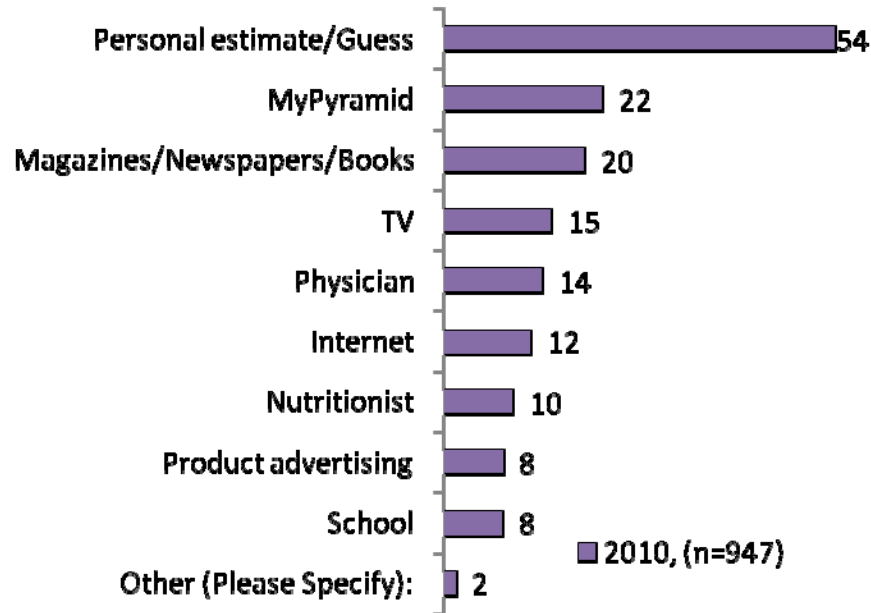




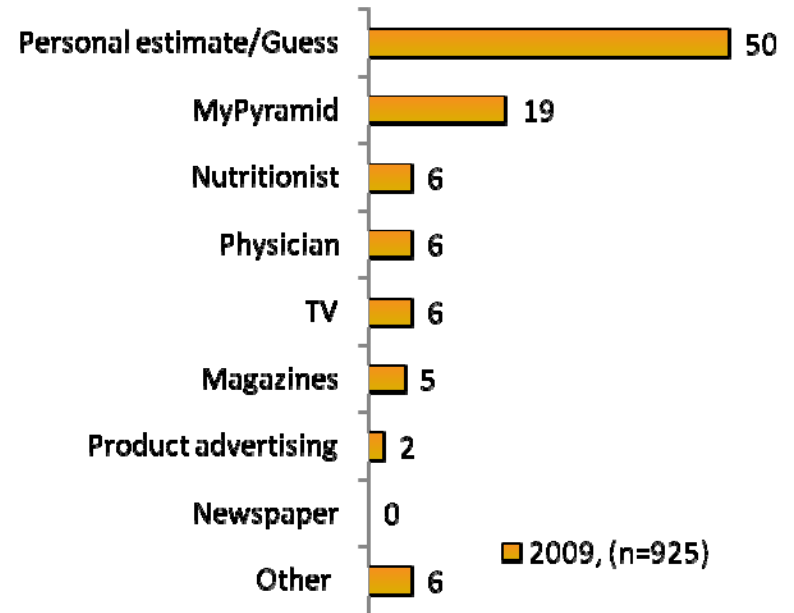


## MyPyramid remains a popular source of information regarding recommended intake but most Moms rely on their personal estimates

**2010 - Source of Recommended Intake**  
*(Only asked to those who know how many servings of FRUITS/VEGETABLES are recommended to eat every day)*



**2009 - Source of Recommended Intake**  
*(Only asked to those who know how many servings of FRUITS/VEGETABLES are recommended to eat every day)*



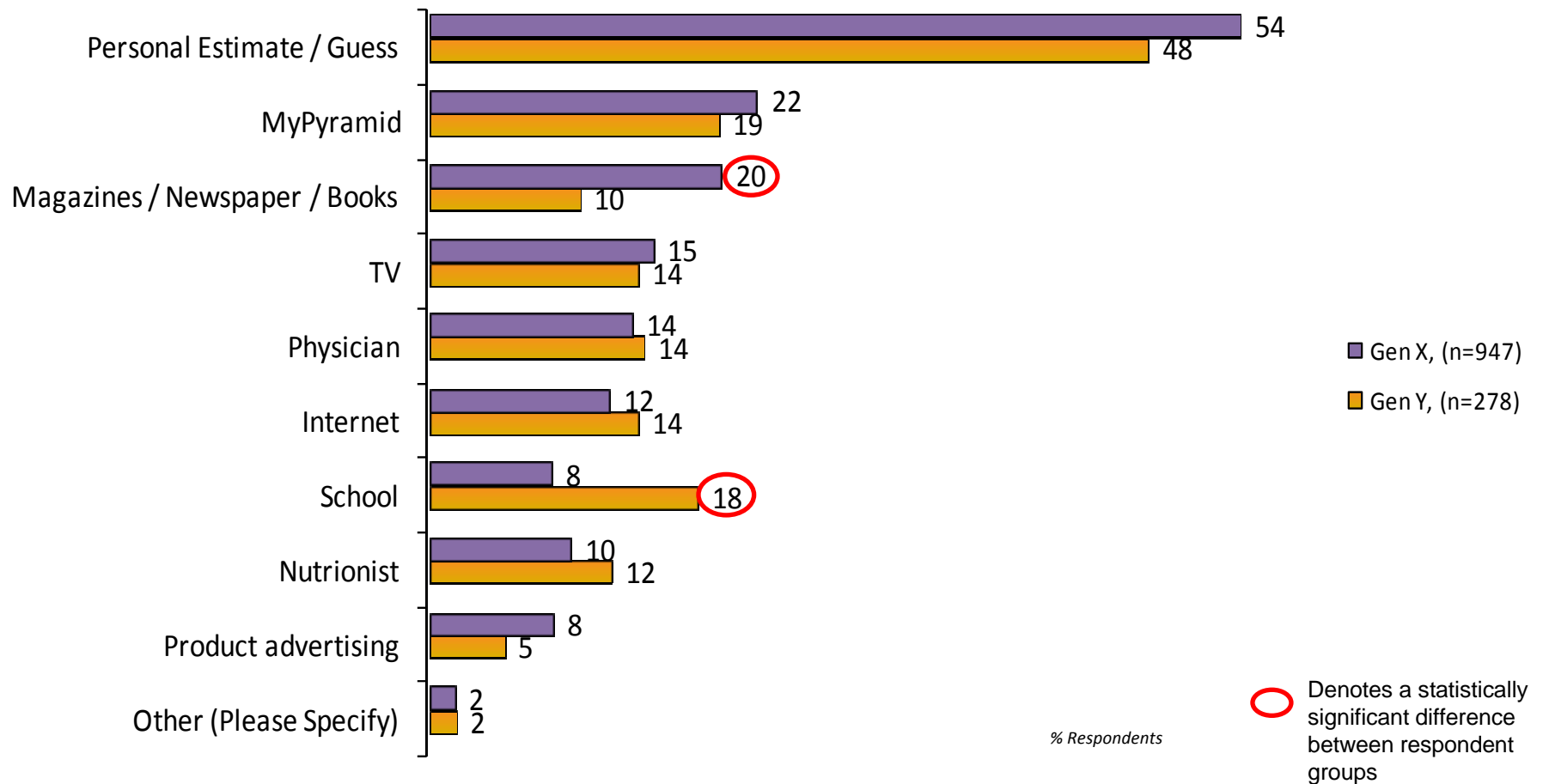
*In the 2010 study, the question type was altered from a **Single Response** to a **Multiple Response** question.*



## Gen X Moms more likely to rely on print publications while Gen Y Moms on schools

74

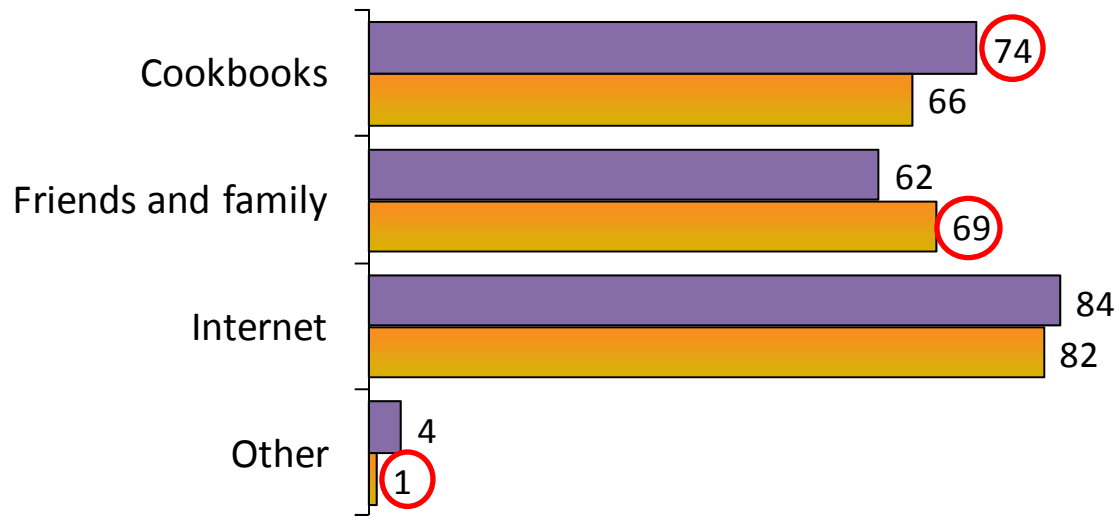
### Sources of Recommended Intake - Gen X vs. Gen Y



Q18: Where did you receive information about the recommended amounts for you?



Where do you normally go to find recipes?



■ Gen X, n=1000  
■ Gen Y, n=300

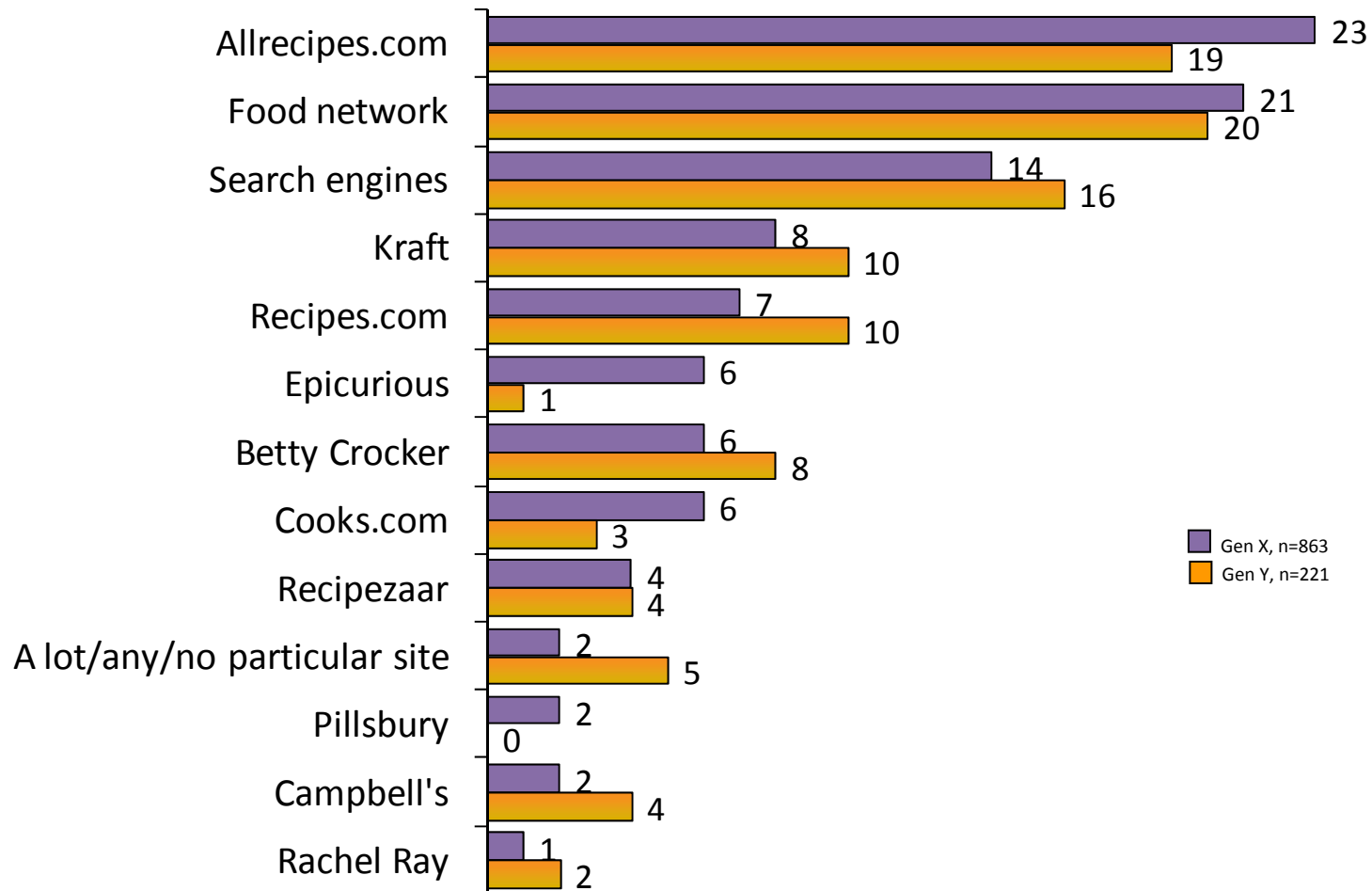
○ Denotes a statistically significant difference between respondent groups

% Respondents

## Mom's seek out recipes on a wide variety of sites



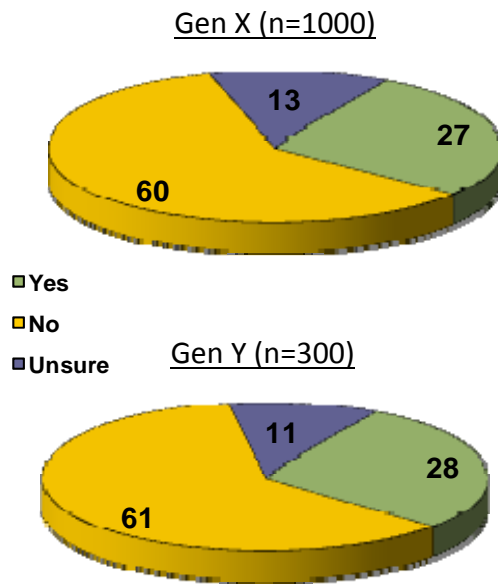
*What websites do you normally visit to find recipes?*  
Only asked to those respondents who selected "Internet" as a place they go to find recipes



% Responses

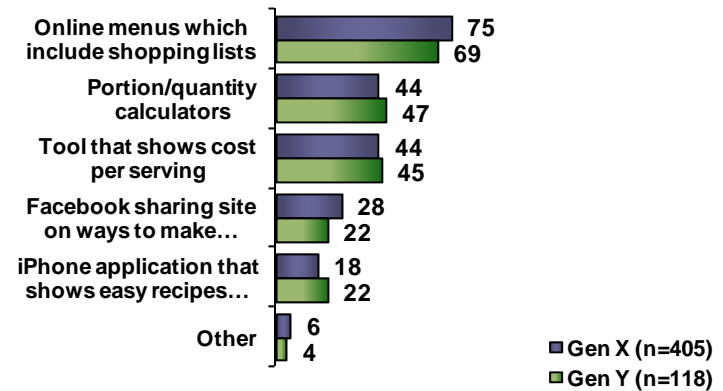
Q50. What websites do you normally visit to find recipes? (open-ended question)

Do you need help to better plan your grocery shopping?



% Respondents

Which of the following would be helpful to you in planning?



% Respondents

Q41. Do you need help to better plan your grocery shopping to include more fruits and vegetables?

Q42. Which of the following would be helpful to you in better planning your grocery shopping to include more fruits and vegetables? (Please select all that apply)

# **Summary and Recommendations**



# Summary and Recommendations (slide 1 of 3)

79

- The economic downturn's negative impact on the consumption of fruits and vegetables, identified in last year's research, appears to have diminished. In 2010, consumption and attitudes have recovered to levels seen in 2008, indicating a return to positive momentum.
- The impact of the campaign (logo and website) remained consistent with the prior year.
  - the logo, however, was slightly more likely to positively influence the purchase decision
- Gen X Moms continue to be highly motivated to increase their own and their family's consumption and also reported a higher consumption of fruit and vegetables compared to last year. Consumption was positively correlated to household income and employment status. *(To control for household income in the analysis, all data has been weighted to the 2008 distribution of household income to ensure comparability.)*
- Gen Y moms reported a slightly higher consumption of fruits and slight lower consumption of vegetables and are equally highly motivated to increase consumption.
- Consistent with prior years, Gen X moms' perceived recommended intake of both fruits and vegetables is positively correlated to their self-reported average daily consumption. While Gen Y moms also demonstrated this type of positive correlation in regards to fruit, there was no correlation when it came to vegetables.

# Summary and Recommendations (slide 2 of 3)

80

- For several metrics relating to the consumption of and attitudes towards fruit and vegetables, the most significant predictor was a mom's level of physical activity – the more physically active a mom, the more likely she and her family were to perceive fruit and vegetables as important and to consume more.
- When thinking of their favorite fruit or vegetable, about half of all moms tend to be Bargain Hunters. Gen X Moms are more likely to purchase based on convenience – *willing to pay a premium if a store is conveniently located near their home or workplace.*
- While both segments are generally, price-sensitive, Gen Y moms are more likely to identify cost as a barrier to consumption. Cost-saving tips and other ways to overcome pricing hurdles will likely resonate especially well with this segment.
  - moms are much less price-sensitive when it comes to fruits and vegetables for their children
- Gen Y moms would benefit from more education: they tend to struggle more than their older counterparts.
- Communicate benefits based on the different needs of each segment: Gen X moms more likely to respond to preventative benefits (heart disease, etc.) while Gen Y moms are drawn to a message regarding the “energy-boosting” benefits of fruits and vegetables.



# Summary and Recommendations (slide 3 of 3)

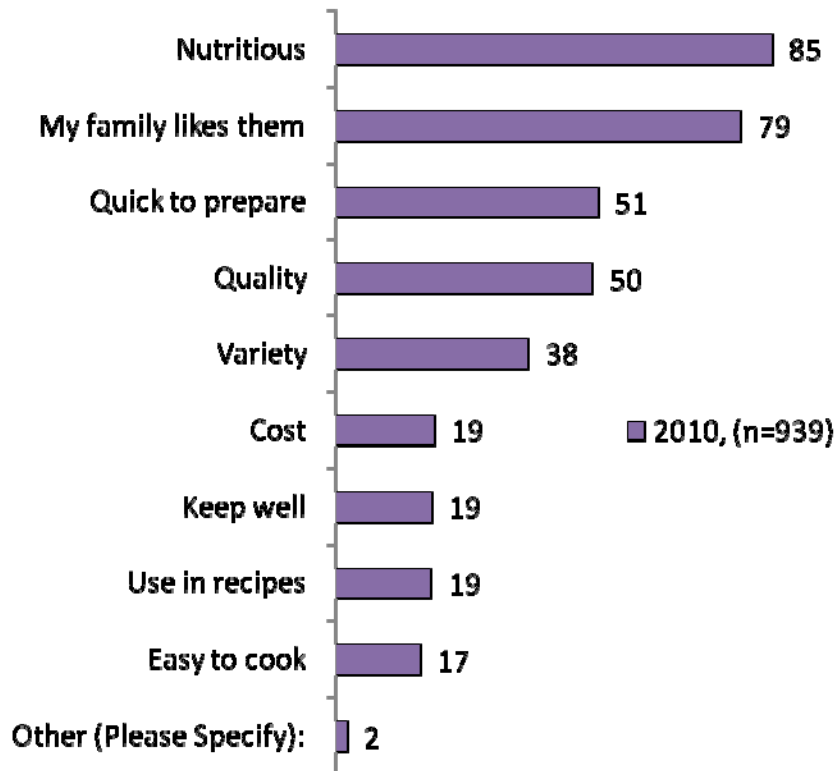
81

- Both Gen X and Gen Y moms believe it is their role to increase the consumption of fruits and vegetables by their families. Reinforcing this message and providing advice and tools to help them track consumption at snacks and meals will not only encourage consumption but reassure moms that they are doing a good job.
- The Internet remains the most effective medium for communication with these 2 target groups: more investment in driving traffic to the More Matters website as well as additional content should help increase awareness and positive brand associations.

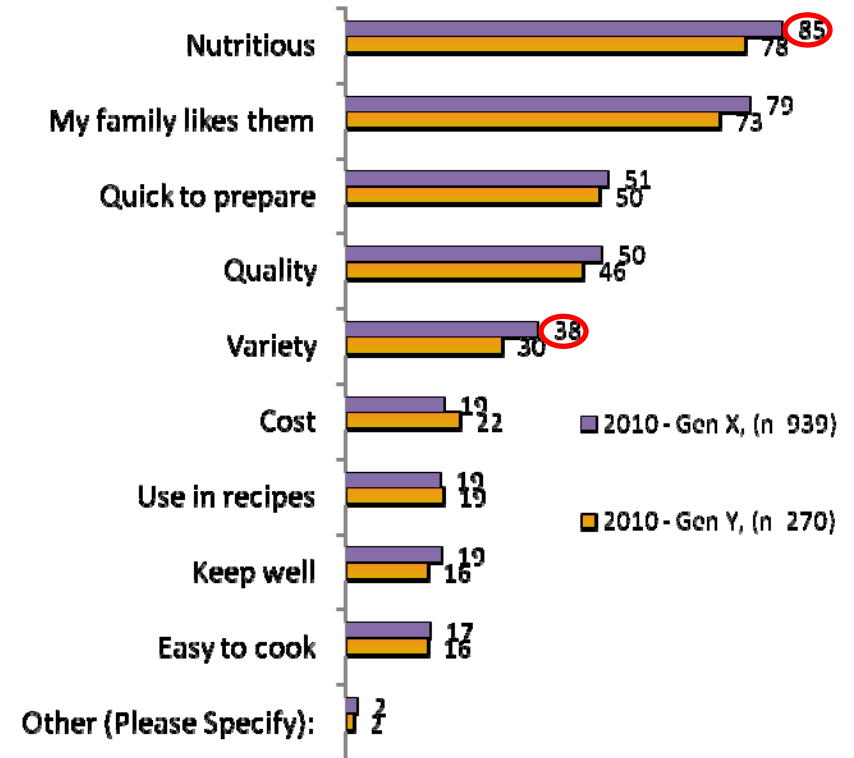


# **Appendix – Forms of Fruits and Vegetables**

**Reason for Purchasing Fresh Fruit**  
(only asked if the product is available in the home)



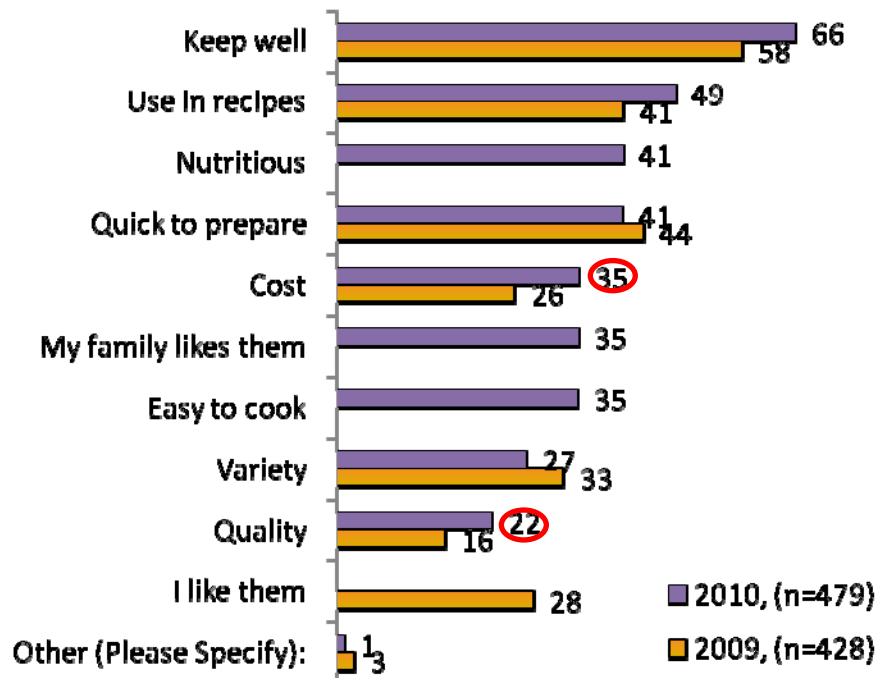
**Reason for Purchasing Fresh Fruit: Gen X vs. Gen Y**  
(only asked if the product is available in the home)



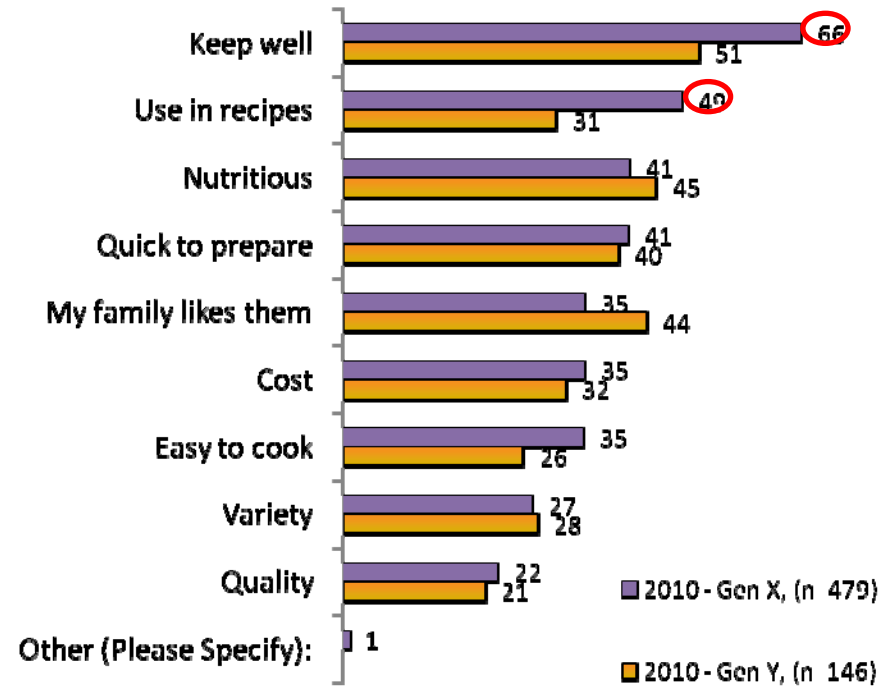


## Shelf life is the top reason for purchasing frozen fruit but Gen X moms were more likely to cite cost and quality this year

**Reason for Purchasing Frozen Fruit**  
(only asked if the product is available in the home)



**Reason for Purchasing Frozen Fruit: Gen X vs. Gen Y**  
(only asked if the product is available in the home)

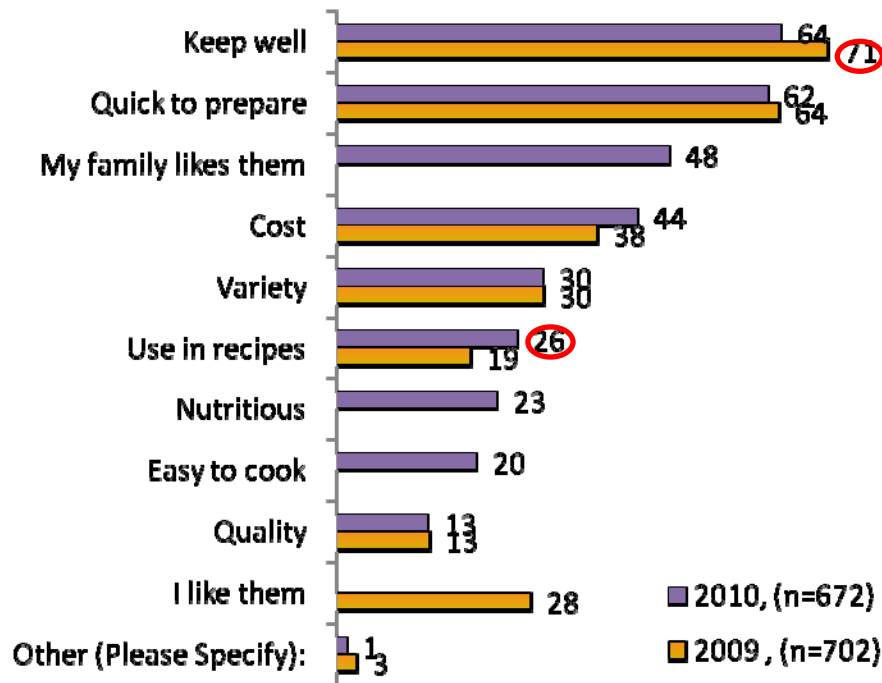


*In 2010, the response option "I like them" was changed to "My family likes them" and "Nutritious" was added.*

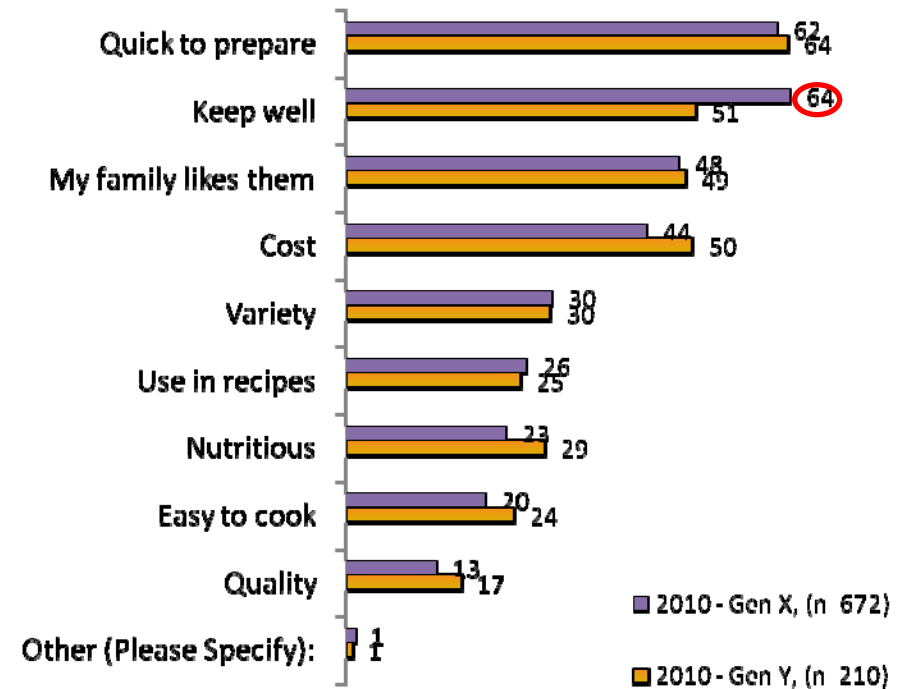


## Gen X moms were slightly less likely to cite shelf life as the top reason for buying canned fruit but more likely to cite “use in recipes”

**Reason for Purchasing Canned Fruit**  
(only asked if the product is available in the home)

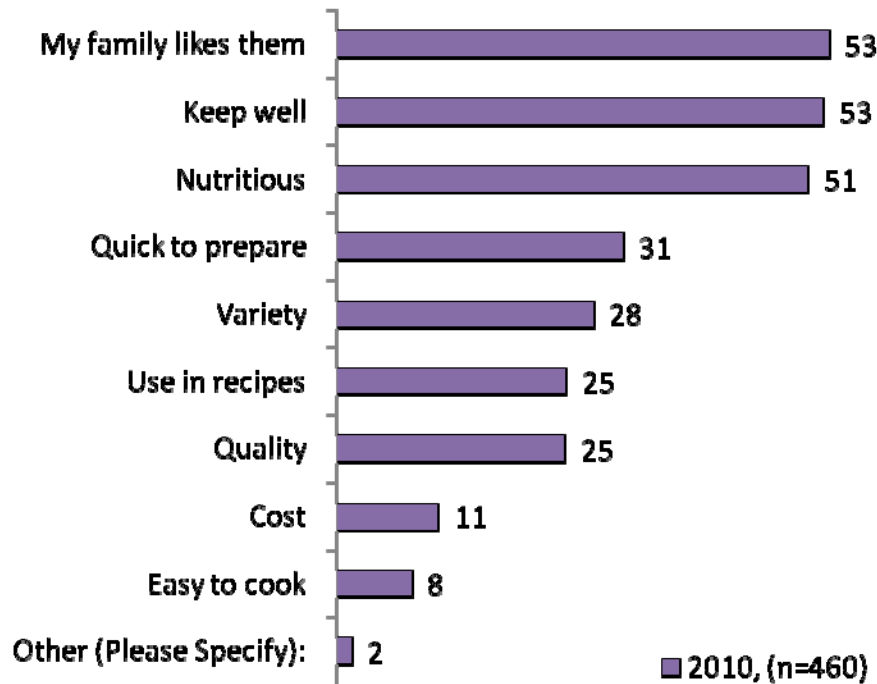


**Reason for Purchasing Canned Fruit: Gen X vs. Gen Y**  
(only asked if the product is available in the home)

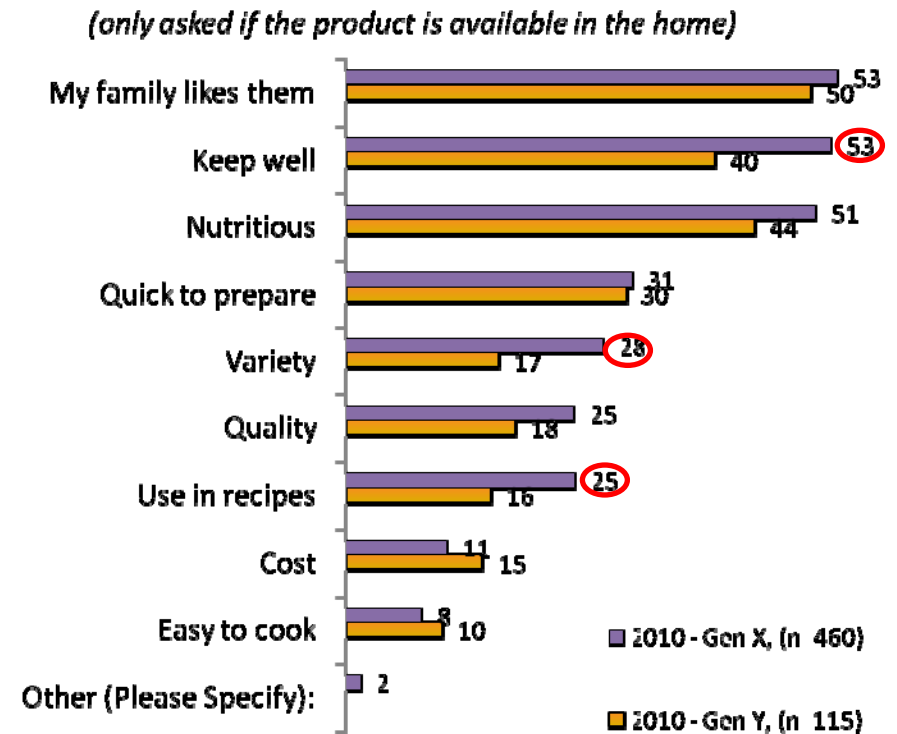


In 2010, the response option “I like them” was changed to “My family likes them” and “Nutritious” was added.

**Reason for Purchasing Dried Fruit**  
(only asked if the product is available in the home)

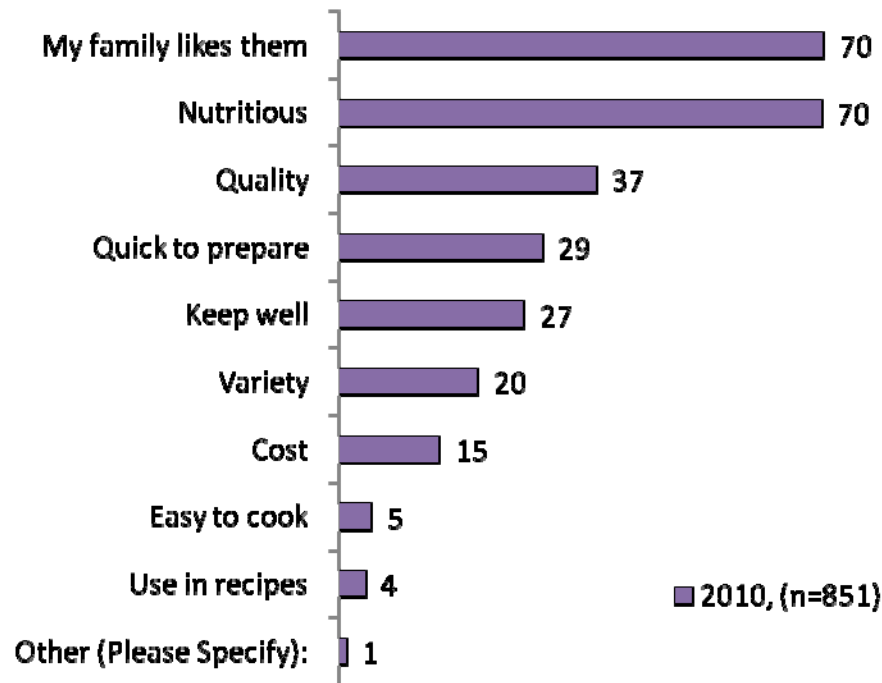


**Reason for Purchasing Dried Fruit: Gen X vs. Gen Y**  
(only asked if the product is available in the home)



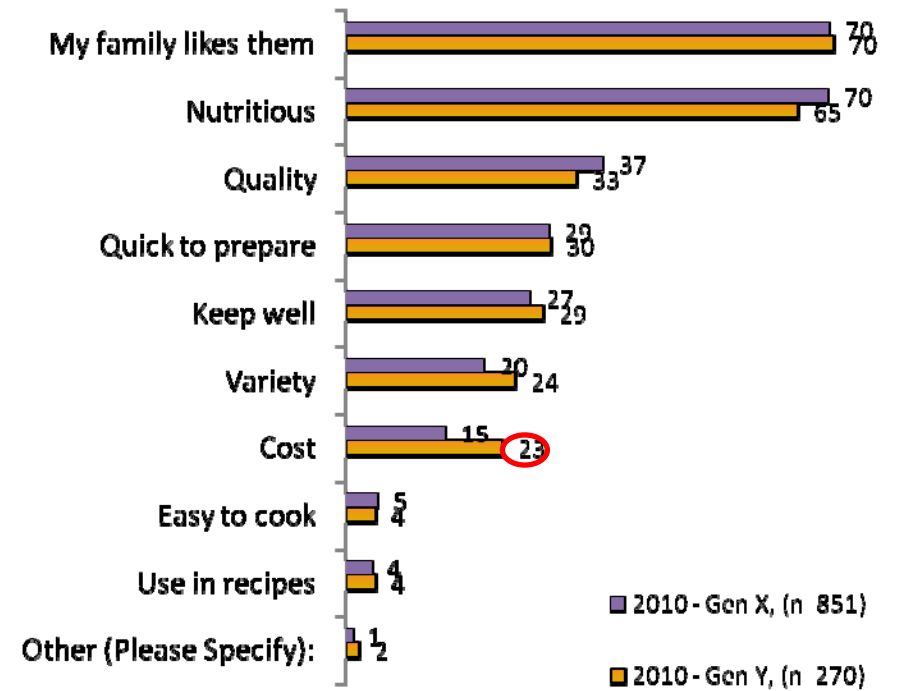
Q28: Why do you purchase dried fruits? (Please select all that apply)

**Reason for Purchasing 100% fruit juice**  
(only asked if the product is available in the home)



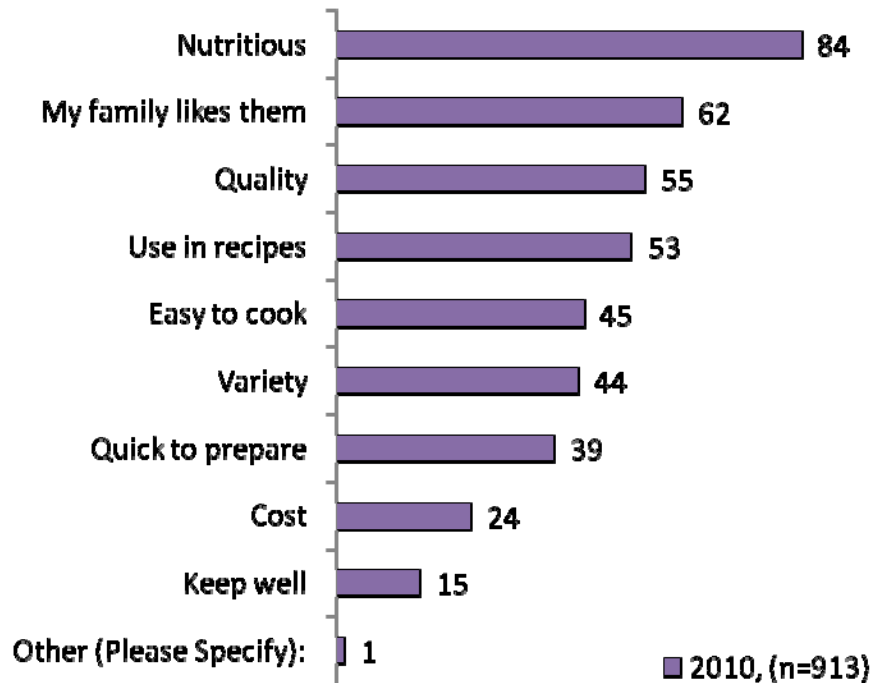
**Reason for Purchasing 100% fruit juice: Gen X vs. Gen Y**

(only asked if the product is available in the home)



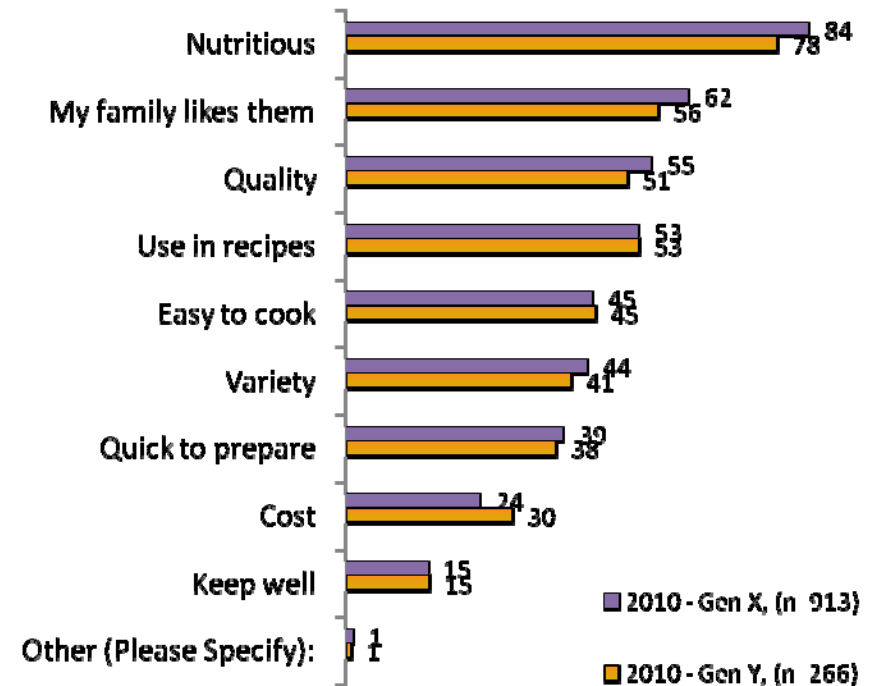
*In 2010, the response option "I like them" was changed to "My family likes them" and "Nutritious" was added.*

**Reason for Purchasing Fresh Vegetables**  
*(only asked if the product is available in the home)*



**Reason for Purchasing Fresh Vegetables:  
Gen X vs. Gen Y**

*(only asked if the product is available in the home)*



Q30: Why do you purchase **fresh** vegetables? (Please select all that apply)

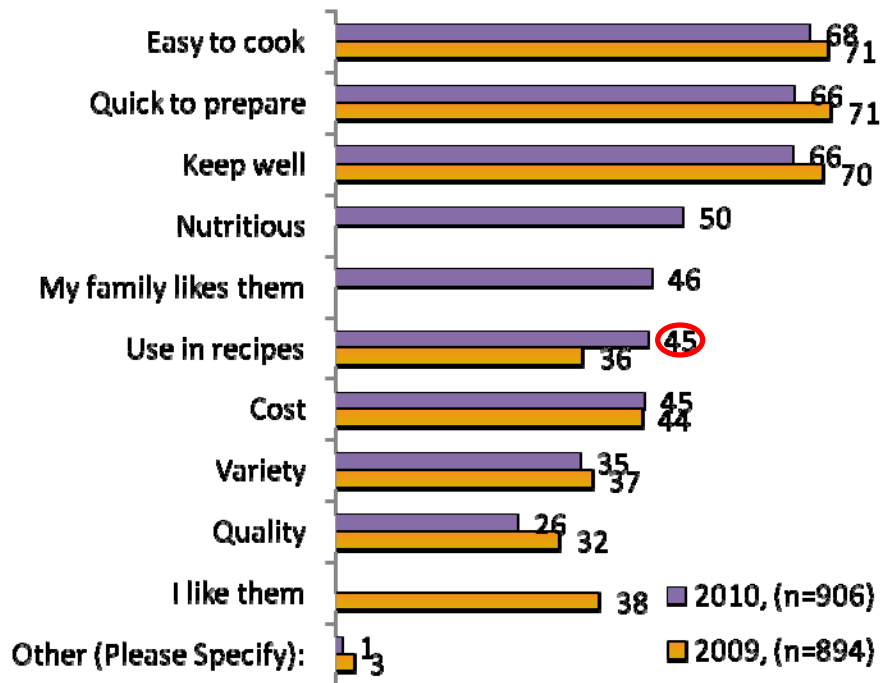




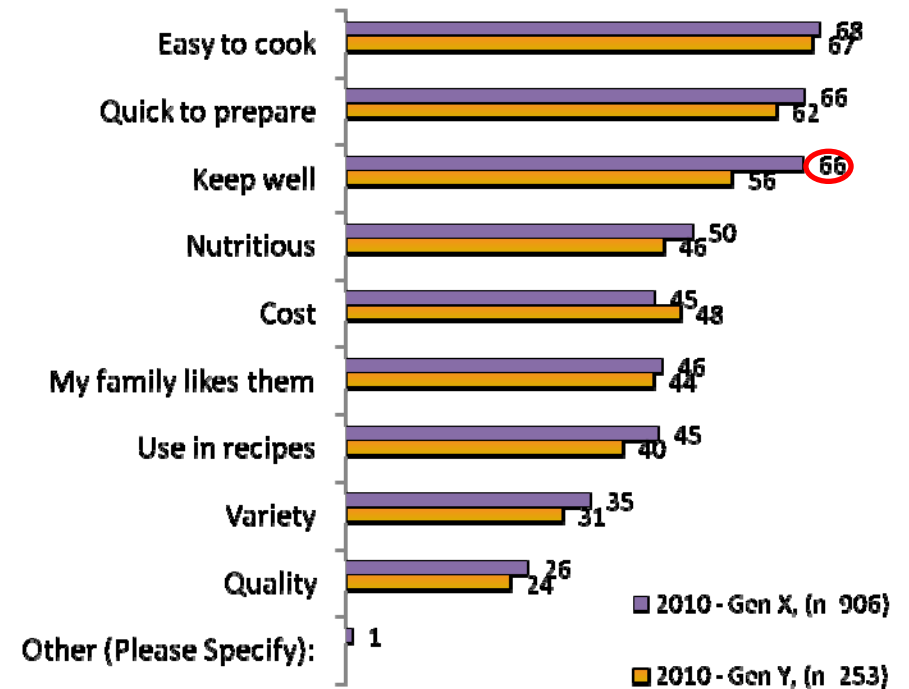
## Convenience and shelf life, particularly amongst Gen X Moms, are the top reasons for buying frozen vegetables

89

**Reason for Purchasing Frozen Vegetables**  
(only asked if the product is available in the home)



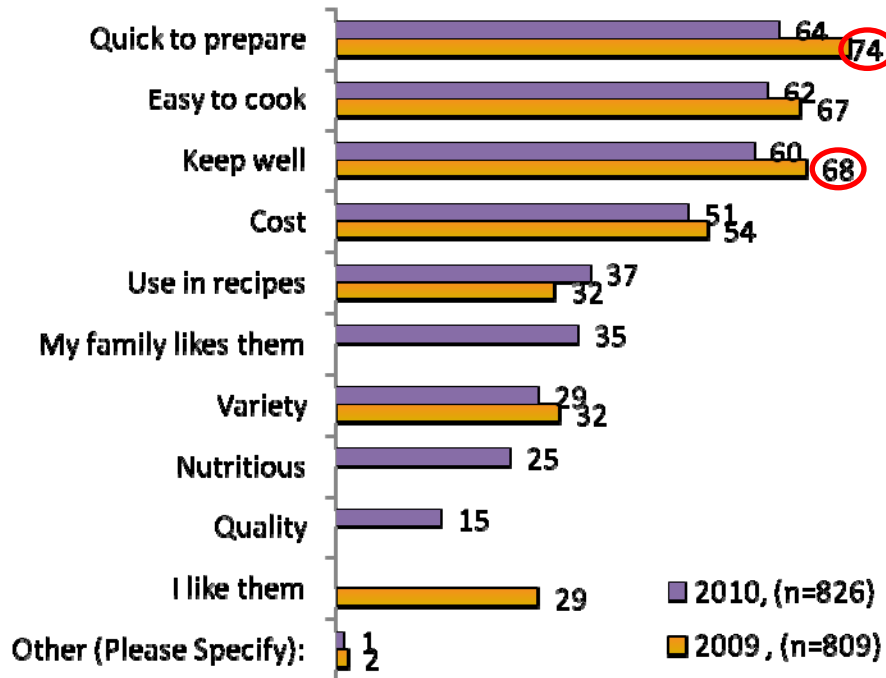
**Reason for Purchasing Frozen Vegetables**  
(only asked if the product is available in the home)



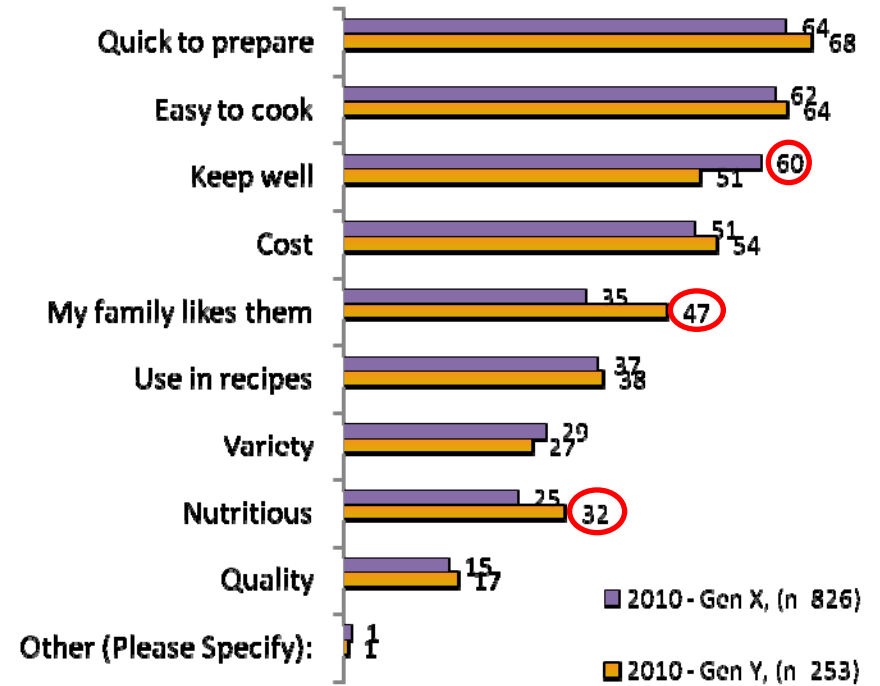
In 2010, the response option "I like them" was changed to "My family likes them" and "Nutritious" was added.

## Gen X Moms were less likely to perceive the benefits of canned vegetables – Gen Y Moms more likely to cite family preference and nutrition

**Reason for Purchasing Canned Vegetables**  
(only asked if the product is available in the home)

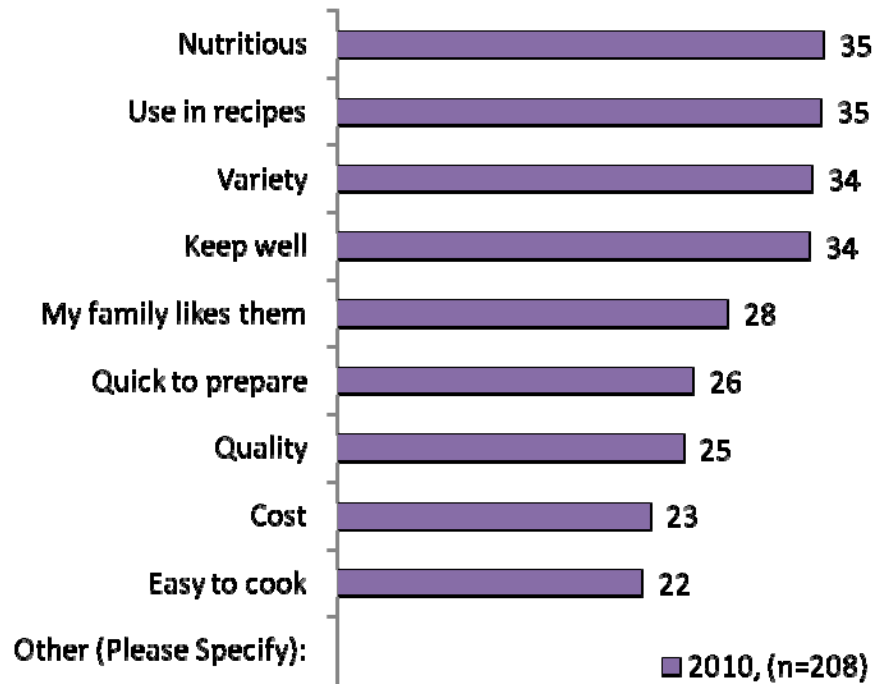


**Reason for Purchasing Canned Vegetables:  
Gen X vs. Gen Y**  
(only asked if the product is available in the home)

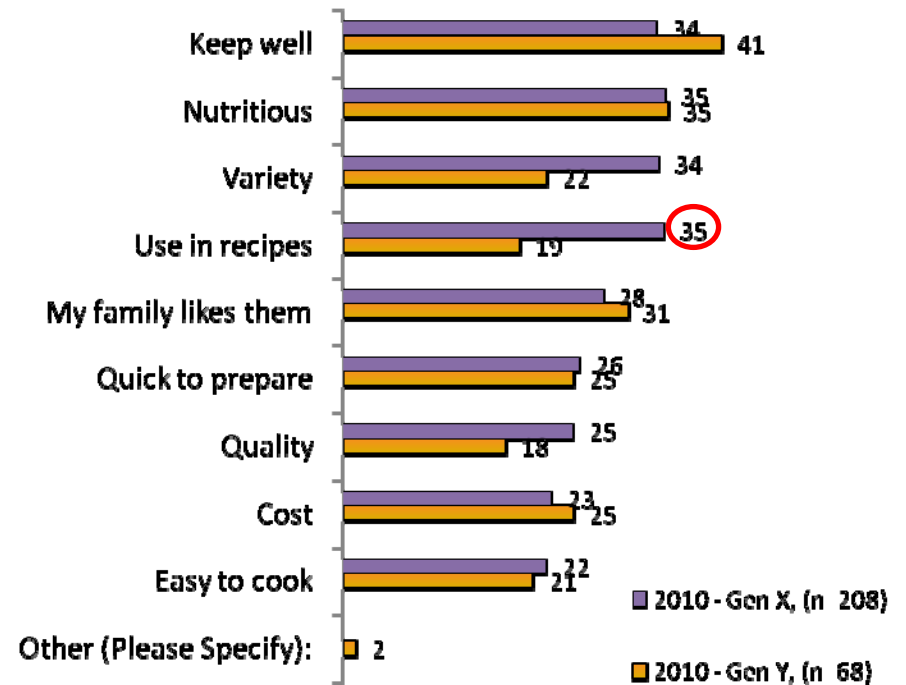


In 2010, the response option "I like them" was changed to "My family likes them" and "Nutritious" and "Quality" were added.

**Reason for Purchasing Dried Vegetables**  
(only asked if the product is available in the home)

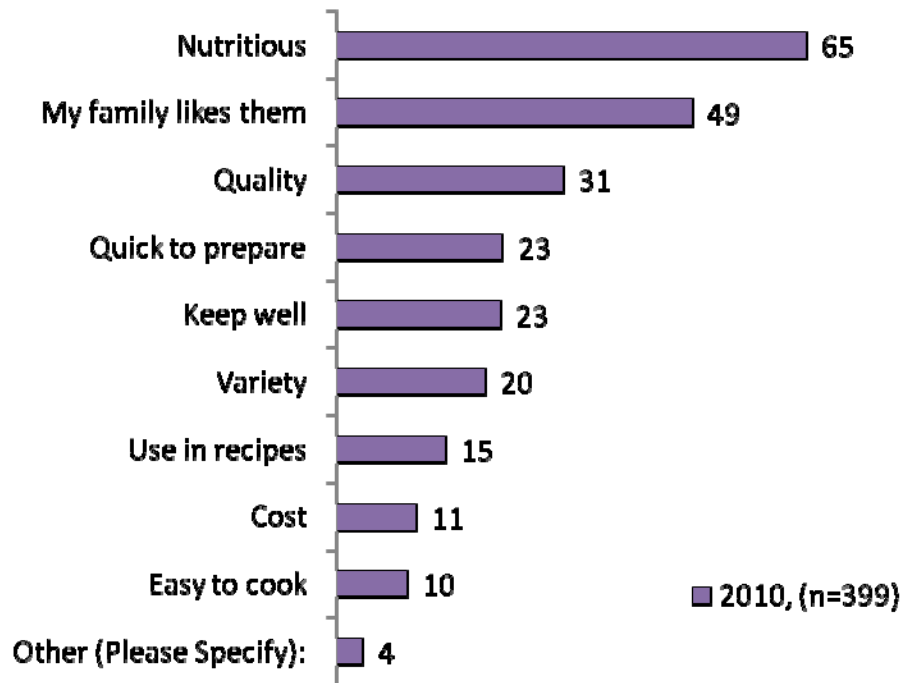


**Reason for Purchasing Dried Vegetables:  
Gen X vs. Gen Y**  
(only asked if the product is available in the home)

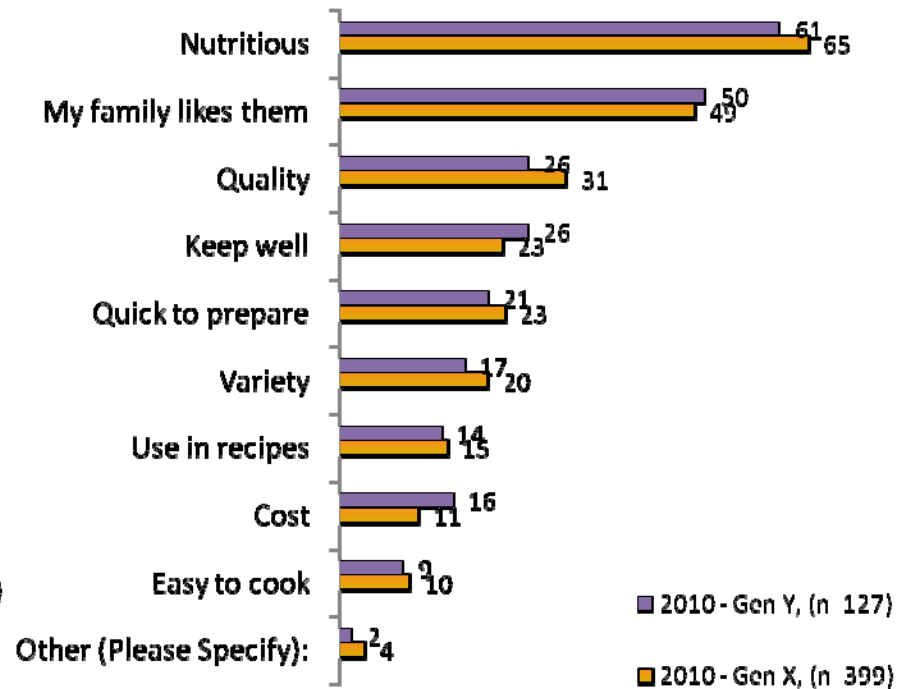


Q33: Why do you purchase dried vegetables? (Please select all that apply)

**Reason for Purchasing 100% vegetable juice**  
(only asked if the product is available in the home)

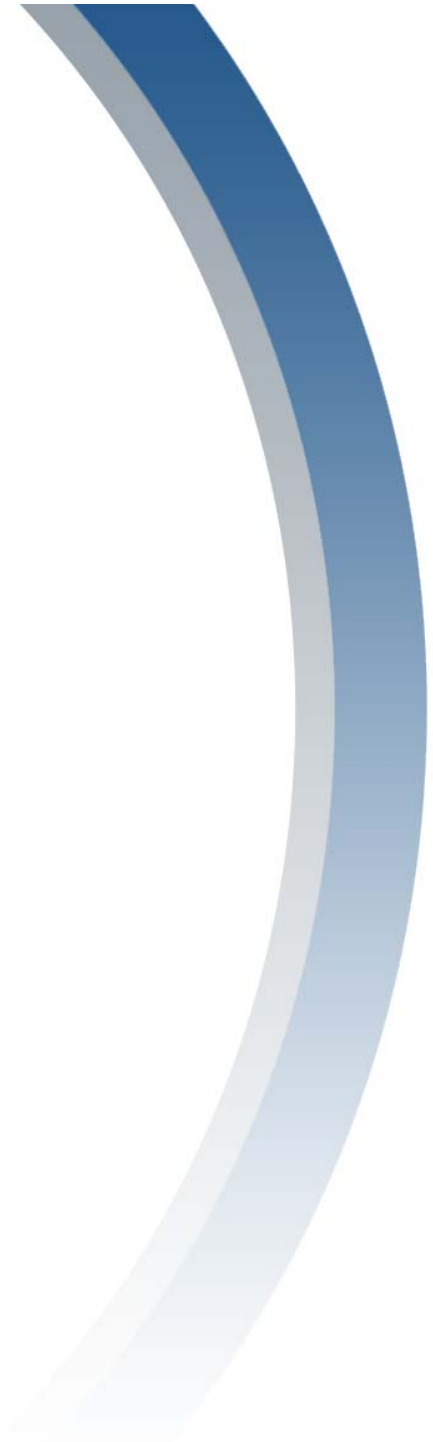


**Reason for Purchasing 100% vegetable juice: Gen X vs. Gen Y**  
(only asked if the product is available in the home)



*In 2010, the response option "I like them" was changed to "My family likes them" and "Nutritious" was added.*

# **Appendix - Demographics**



## Respondent Profile

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MARITAL STATUS	2010		2009	2008	2007
	Gen X %	Gen Y %	%	%	%
Married/Living with someone	90	68	92	87	87
Single	4	29	3	5	5
Separated/Divorced	5	4	5	8	8
Widowed	<1	--	<1	<1	<1

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

WORK OUTSIDE THE HOME	%	%	%	%	%
No	43	57	38	29	31
Yes, Part-time	22	19	22	21	21
Yes, Full-time	35	24	41	50	48

ETHNICITY	2010		2009	2008	2007	2006
	Gen X %	Gen Y %	%	%	%	%
White/Caucasian	82	65	84	84	83	81
Black/African American	5	12	4	4	5	7
Hispanic/Latino	7	14	5	4	4	6
Asian/Pacific Islander	5	6	6	6	6	5
Other	1	2	1	2	2	2

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

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

HHI	%	%	%	%	%	%
Less than \$25K	4	30	4	4	3	2
\$25K - \$50K	12	39	12	12	14	20
\$50K - \$75K	22	19	22	22	22	26
\$75K - \$100K	25	8	25	25	26	22
\$100K - \$150K	25	3	24	25	22	21
\$150K or more	13	1	14	13	12	9

OWN EDUCATION	%	%	%	%	%	%
Did not finish high school	1	4	1	<1	1	<1
High school graduate	12	25	16	6	7	5
Some college	25	41	25	23	20	25
College graduate	37	19	36	41	43	41
Some graduate work	5	3	5	6	7	8
Completed graduate work	17	6	15	22	20	17
Trade/vocational school	3	3	3	3	3	3

Mean Age of Children	2010
	Yrs.
Gen X	8
Gen Y	5

# Geographic Profile

## “Atlantic”

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

MIDDLE ATLANTIC	X %	Y %	%	%	%	%
Delaware	1	<1	1	<1	<1	1
Maryland	1	2	2	2	1	2
New Jersey	5	1	3	3	3	3
New York	8	4	6	5	5	5
Pennsylvania	5	5	6	5	5	4
Washington	2	1	2	1	2	3

## “Midwest”

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

## “South”

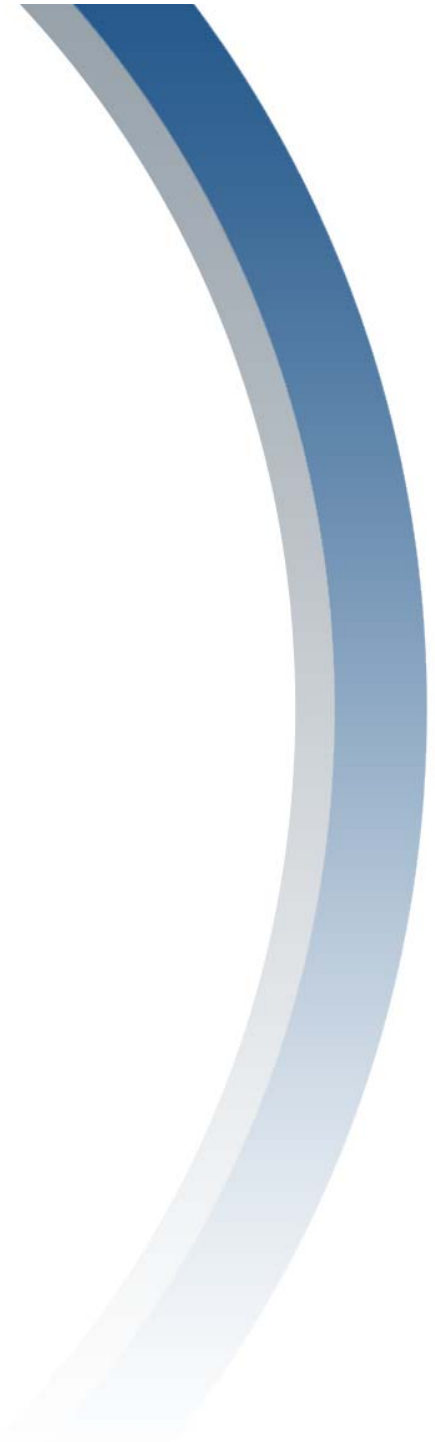
	10		09	08	07	06
SOUTH	X %	Y %	%	%	%	%
Alabama	1	2	<1	1	1	1
Arkansas	1	1	1	1	1	1
Florida	5	6	3	5	4	5
Georgia	2	5	1	3	3	4
Kentucky	1	1	1	2	1	1
Louisiana	1	1	1	1	1	1
Mississippi	1	2	<1	<1	1	<1
North Carolina	4	4	3	3	3	2
South Carolina	1	2	1	1	2	1
Tennessee	1	2	2	2	2	2
Virginia	3	4	3	2	3	2
West Virginia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

## “West”

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

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

# **Appendix - Other Slides**



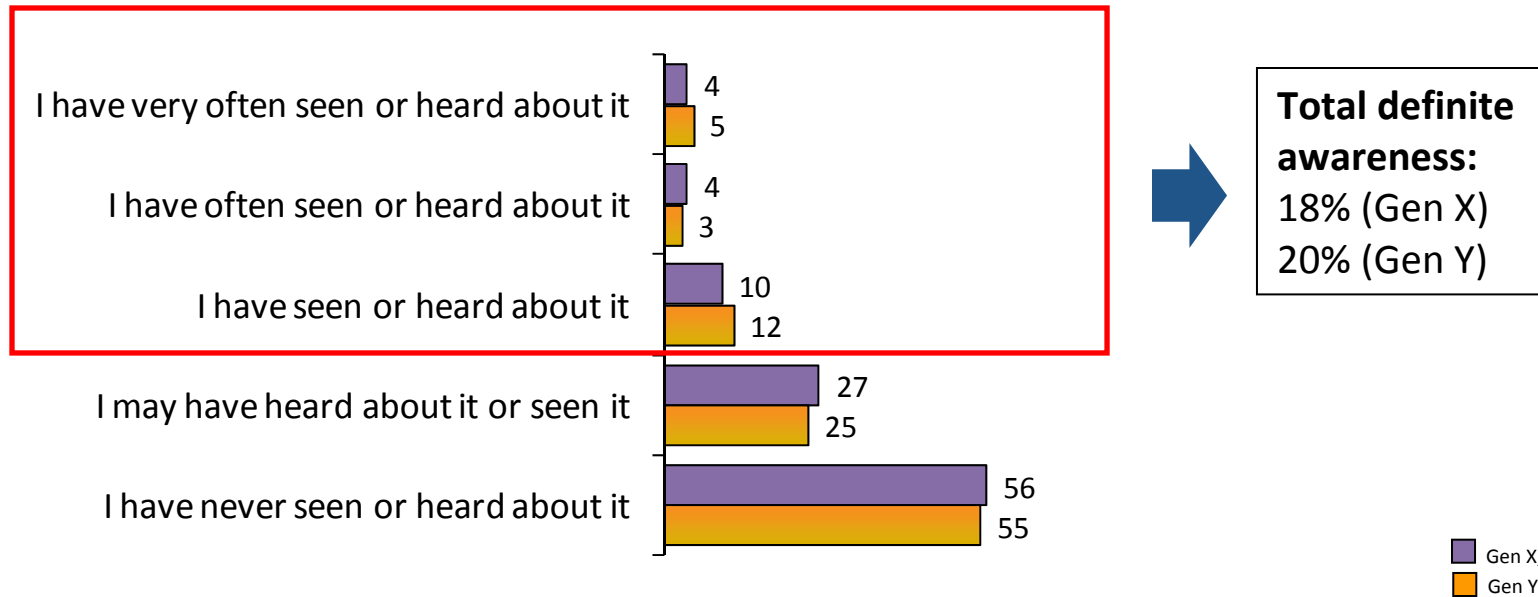


## Gen Y Moms equally likely to be aware of logo as Gen X Moms

97



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



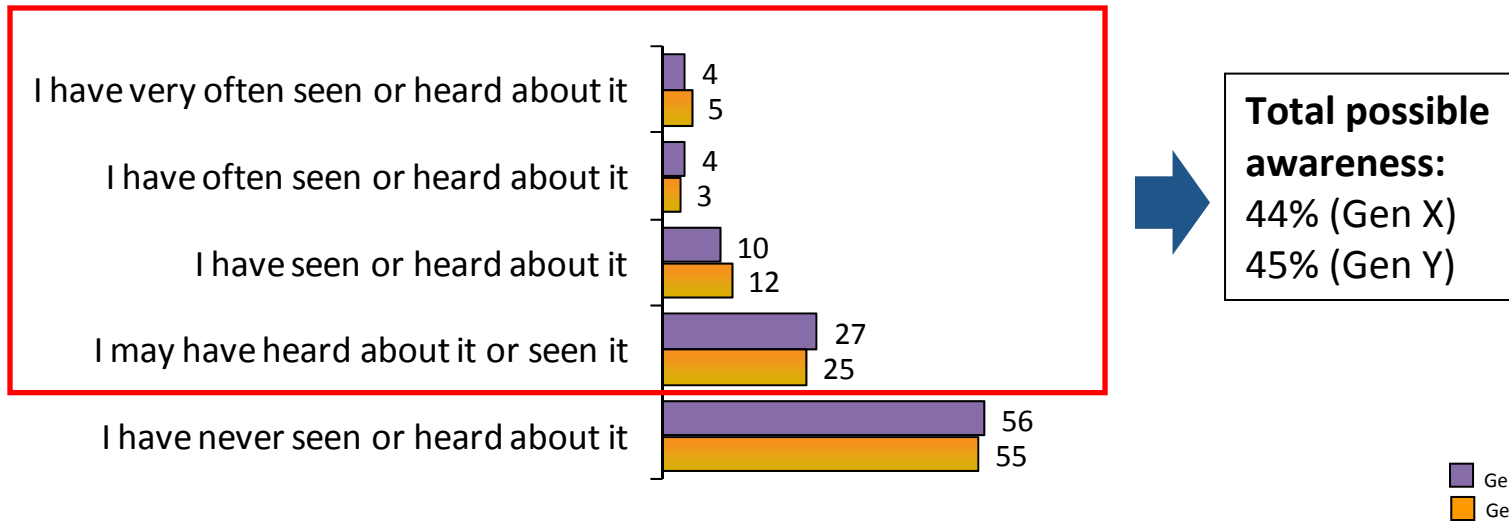
% Respondents

Q66. Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?

## Gen Y Moms equally likely to be aware of logo as Gen X Moms



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



% Respondents

Q66. Which of the following statements best describes your level of familiarity with Fruits & Veggies – More Matters?

## Gen X vs. Gen Y



### Logo Brand Association

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



■ Gen X (n = 343)

■ Gen Y (n = 115)

○ Denotes a statistically significant difference between respondent groups

% Respondents

Q70. If you see the More Matters™ logo on a product, what does it say to you about the product?

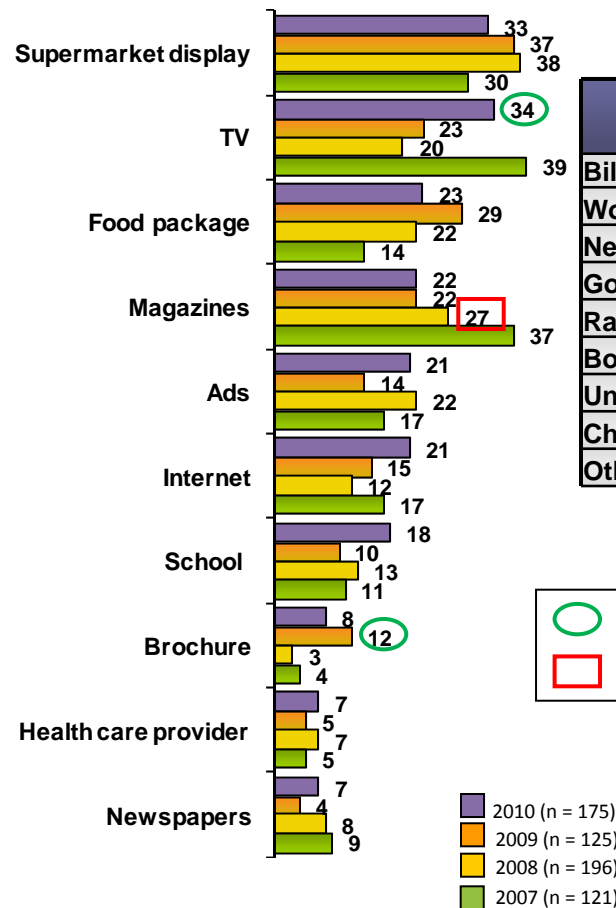
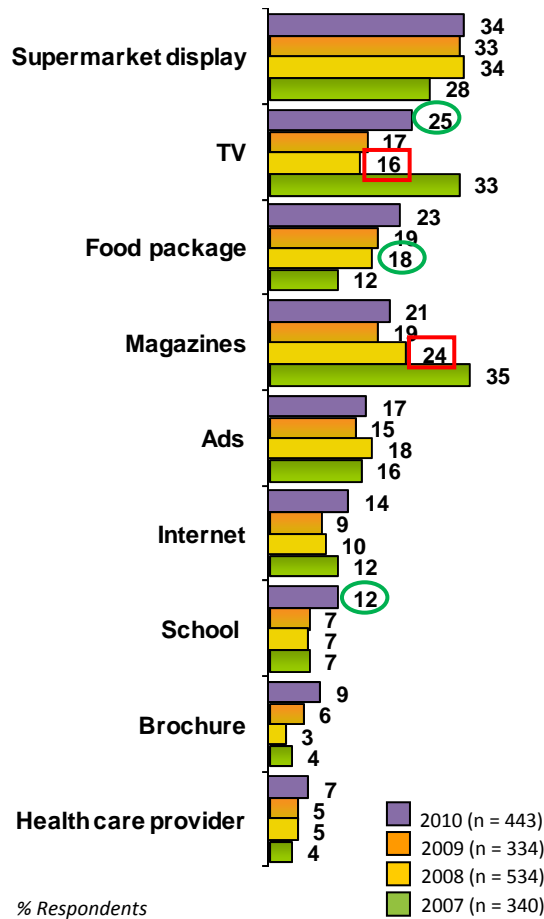
# Gen X Moms were much more likely to report seeing the logo on TV last year and supermarket displays remain a key channel



How did you become familiar with the logo?

Includes those who **at least may have** heard about or seen the logo

Only includes only those who have definitely seen or heard about the logo



	Secondary Channels			
	2010	2009	2008	2007
Billboard	6	5	2	2
Word of mouth	6	4	2	2
Newspapers	5	2	6	5
Government	4	4	1	0
Radio	4	1	1	3
Books	4	1	0	1
University	2	0	0	0
Church	1	0	0	0
Other	8	7	11	8

○ = significantly higher than previous wave  
 □ = significantly lower than previous wave



Q67: Where did you see or hear of Fruits & Veggies—More Matters™? (Please select all that apply)

## Why do you say that?

Extremely/Very Motivating  
(2010 – 38%; 2009 – 33%; 2008 - 20%; 2007 - 22%)

	'10	'09	'08	'07
	%	%	%	%
The graphics are easy to understand			21	22
It is educational			7	19
Because it is a good reminder			32	18
It influences me to eat more (is motivating)			8	11
Because I want myself/my family to be healthier			7	9
Because I know how important fruits and vegetables are to our health			14	7
Because it grabs your attention			3	6
Because it makes it look more fun to eat fruits and vegetables			6	6
Because it reminds you of the importance of eating well			3	5
Easy to understand			0	3

Somewhat Motivating  
(2010 – 39%; 2009 – 44%; 2008 - 54%; 2007 - 50%)

	'10	'09	'08	'07
	%	%	%	%
I am not familiar with the program			6	22
It's a good reminder			24	22
Because the graphics are good (colors, logo)			4	15
Because I already know that			6	10
The logo is not that motivating to me			0	10
Grabs my attention			3	7
It influences me to eat more (is motivating)			1	7
Not enough information on it			8	6
Good message			3	5
It doesn't grab my attention/It is not strong enough			5	4
Slogan is good			2	3
Does not provide any suggested strategy			3	2
Gives me the idea that it is more healthy to eat fruits and veggies			7	2

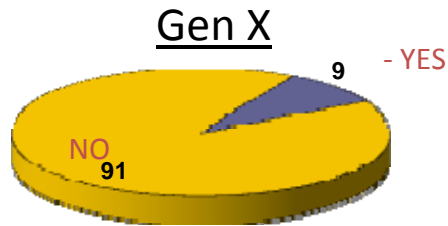
Not Very/Not at All Motivating  
(2010 – 23%; 2009 – 23%; 2008 - 26%; 2007 - 28%)

	'10	'09	'08	'07
	%	%	%	%
Does not/cannot motivate me to eat more fruits and veggies	37	26	43	27
Doesn't grab my attention	23	31	18	4
Already know that	20	12	12	18
Not enough information on it	10	13	12	9
I am not familiar with the program	10	9	12	52
Did not provide any suggested strategy	1	3	5	4

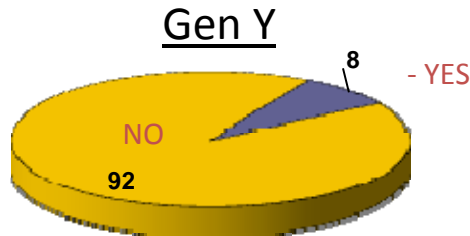
2010 (n=100)

*Note: In 2010 and 2009, this question was only asked to those who are aware of logo and not to those who responded very/not at all motivated by Fruits & Veggies-More Matters™*

Have you visited [www.fruitsandveggiesmorematters.org](http://www.fruitsandveggiesmorematters.org)?



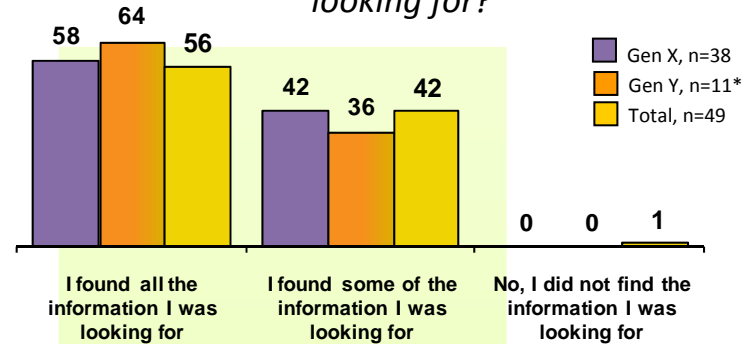
% Respondents (n = 443)



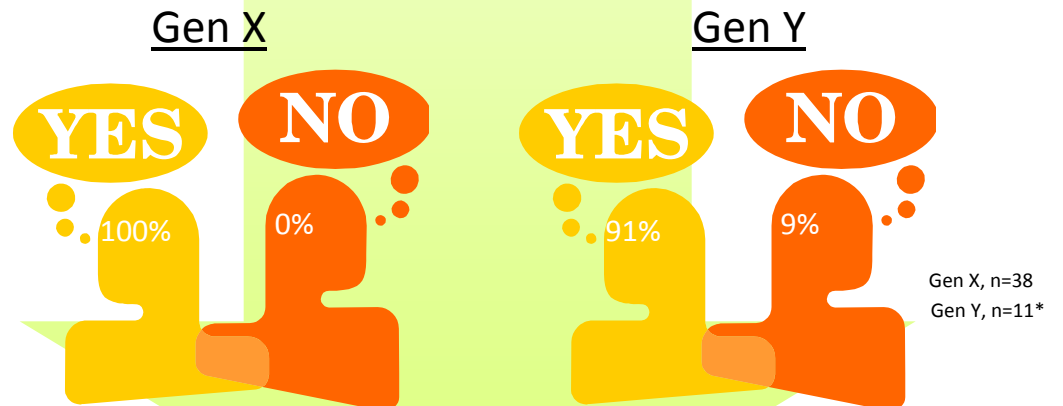
% Respondents (n = 136)

○ Denotes a statistically significant difference between respondent groups

Did you find the information you were looking for?



Did you use the information you obtained from the site?



% Respondents

\*CAUTION: Small sample base

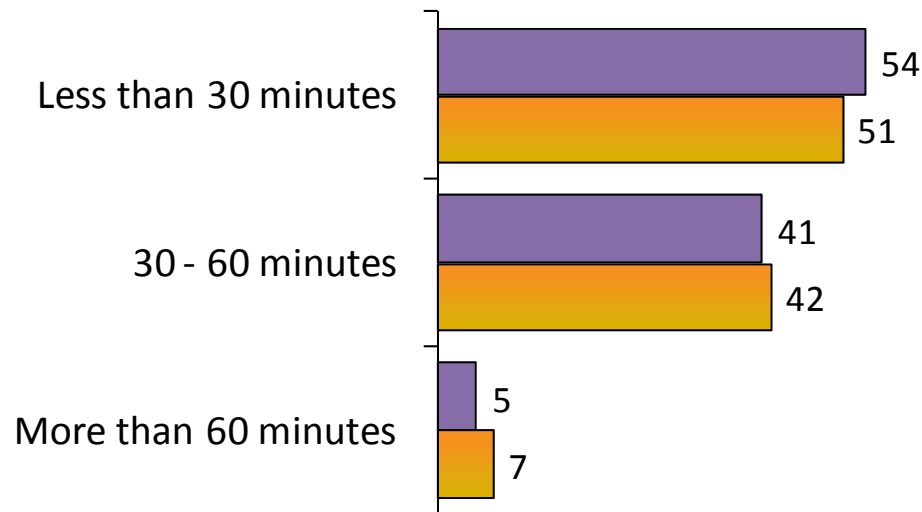
Q72. Have you visited [www.fruitsandveggiesmorematters.org](http://www.fruitsandveggiesmorematters.org)?

Q73. Did you find the information you were looking for?

Q74. Did you use the information you obtained from the site?

## Gen X vs. Gen Y

*How much moderate or vigorous activity (such as brisk walking, jogging, biking, aerobics or yard work) do you engage in most days, in addition to your normal daily routine?*



% Respondents

Gen X, n=1000  
Gen Y, n=300

○ Denotes a statistically significant difference between respondent groups

Q7. How much moderate or vigorous activity (such as brisk walking, jogging, biking, aerobics, or yard work) do you engage in most days, in addition to your normal daily routine?

## INFLUENCERS: The Internet remains the preferred source of information

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

	----- RANK ORDER (%) -----												TOTAL SCORE				TOTAL MINDSHARE SCORE			
	1 <sup>st</sup> Choice				2 <sup>nd</sup> Choice				3 <sup>rd</sup> Choice											
	2010	2009	2008	2007	2010	2009	2008	2007	2010	2009	2008	2007	2010	2009	2008	2007	2010	2009	2008	2007
Internet	48	44	49	44	16	18	16	14	14	12	11	14	78	74	76	72	302	286	303	277
Health Care Provider	11	10	6	10	14	13	9	11	12	16	10	10	37	39	25	31	109	105	66	95
Nutritionist/Dietitian	10	13	10	9	11	14	7	8	10	12	10	8	31	39	25	24	93	119	83	75
Family	9	8	5	8	14	10	10	9	10	13	8	11	33	31	24	28	97	83	66	78
Magazines	5	7	10	10	14	10	21	20	14	12	16	16	33	29	46	47	81	77	127	128
Books	5	5	5	5	11	13	14	12	13	11	13	14	29	29	32	31	71	75	80	76
Friend	5	3	5	5	8	8	9	10	9	7	10	9	22	18	24	24	58	46	60	64
Supermarket	3	6	7	5	4	5	8	8	6	7	11	7	13	18	26	20	33	52	71	54
Television	2	2	2	2	4	4	3	4	6	5	6	6	12	11	10	11	28	27	23	26
School	1	1	1	1	1	1	2	2	2	2	2	2	4	4	4	5	10	10	11	13
Newspaper	0	1	0	1	1	2	2	2	2	2	3	2	3	5	5	4	5	13	9	9
Drug Store	0	0	0	0	0	0	0	0	1	1	0	1	1	1	0	1	1	1	0	3

*Mindshare Score: Additive score where each first mention garners five points, each second mention garners three points and each third mention garners a single point. (n = 1000)*

### OTHER SOURCES OF INFO MOMS WOULD TO OBTAIN INFORMATION ABOUT FRUITS & VEGETABLES USE INCLUDE:

<i>Physicians Committee for Responsible Medicine (PCRM)</i>	<i>Anarcha (feminist parenting community)</i>	<i>Health food store</i>	<i>Library</i>
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Q65. *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*



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

	----- RANK ORDER (%) -----						TOTAL SCORE		TOTAL MINDSHARE SCORE	
	1 <sup>st</sup> Choice		2 <sup>nd</sup> Choice		3 <sup>rd</sup> Choice					
	Gen X	Gen Y	Gen X	Gen Y	Gen X	Gen Y	Gen X	Gen Y	Gen X	Gen Y
Internet	48	40	16	18	14	13	<b>78</b>	<b>71</b>	<b>302</b>	<b>267</b>
Health Care Provider	11	12	14	16	12	13	<b>37</b>	<b>41</b>	<b>109</b>	<b>121</b>
Nutritionist/Dietitian	10	16	11	10	10	12	<b>31</b>	<b>38</b>	<b>93</b>	<b>122</b>
Family	9	13	14	15	10	12	<b>33</b>	<b>40</b>	<b>97</b>	<b>122</b>
Magazines	5	2	14	7	14	10	<b>33</b>	<b>19</b>	<b>81</b>	<b>41</b>
Books	5	3	11	11	13	9	<b>29</b>	<b>23</b>	<b>71</b>	<b>57</b>
Friend	5	2	8	9	9	9	<b>22</b>	<b>20</b>	<b>58</b>	<b>46</b>
Supermarket	3	5	4	5	6	5	<b>13</b>	<b>15</b>	<b>33</b>	<b>45</b>
Television	2	4	4	5	6	9	<b>12</b>	<b>18</b>	<b>28</b>	<b>44</b>
School	1	2	1	3	2	3	<b>4</b>	<b>8</b>	<b>10</b>	<b>22</b>
Newspaper	0	1	1	0	2	2	<b>3</b>	<b>3</b>	<b>5</b>	<b>7</b>
Drug Store	0	1	0	1	1	2	<b>1</b>	<b>4</b>	<b>1</b>	<b>10</b>

*Mindshare Score: Additive score where each first mention garners five points, each second mention garners three points and each third mention garners a single point. (n = 1300, Gen X, n=1000, Gen Y, n=300)*

Q65. *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*

## Estimated number of cups for average fruit servings

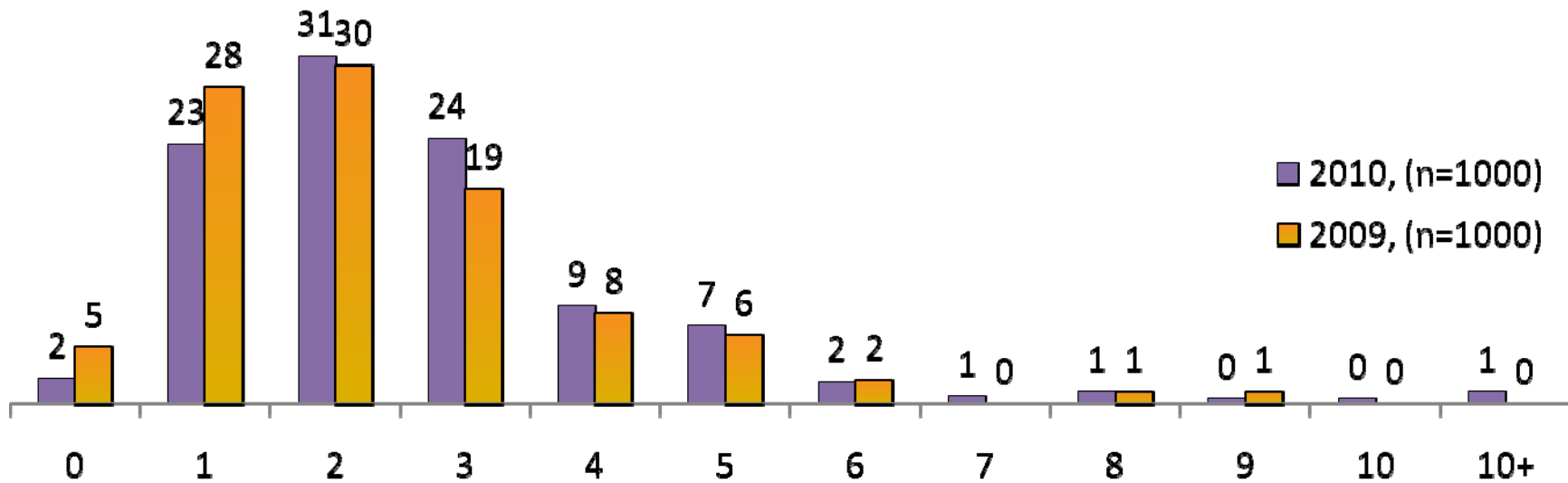
Daily Servings	2010 – FRUIT				2009 - FRUIT			
	Assumed Conversion to Cups	Correct Conversion to Cups	Variance (%)	n=	Assumed Conversion to Cups	Correct Conversion to Cups	Variance (%)	n=
1	1.08	0.5	+116	230	1.16	0.5	+132	304
2	2.08	1	+108	309	2.03	1	+103	286
3	3.03	1.5	+102	233	2.67	1.5	+78	190
4	4.27	2	+114	86	3.99	2	+100	73
5	4.69	2.5	+88	69	4.06	2.5	+62	51
6	5.26	3	+75	19*	5.53	3	+84	17*
7	5.97	3.5	+71	6*	5.33	3.5	+52	3*
8	5.72	4	+43	10*	5.80	4	+45	5*
9	4.00	4.5	-11	4*	-	4.5	-	0
10	5.39	5	+8	4*	5.71	5	+14	7*

*Only asked to those who eat more than 0 servings per day*

*\*\*Does not include 8 respondents in 2010 who indicated greater than 10 Daily Servings*

\*Caution: small sample size

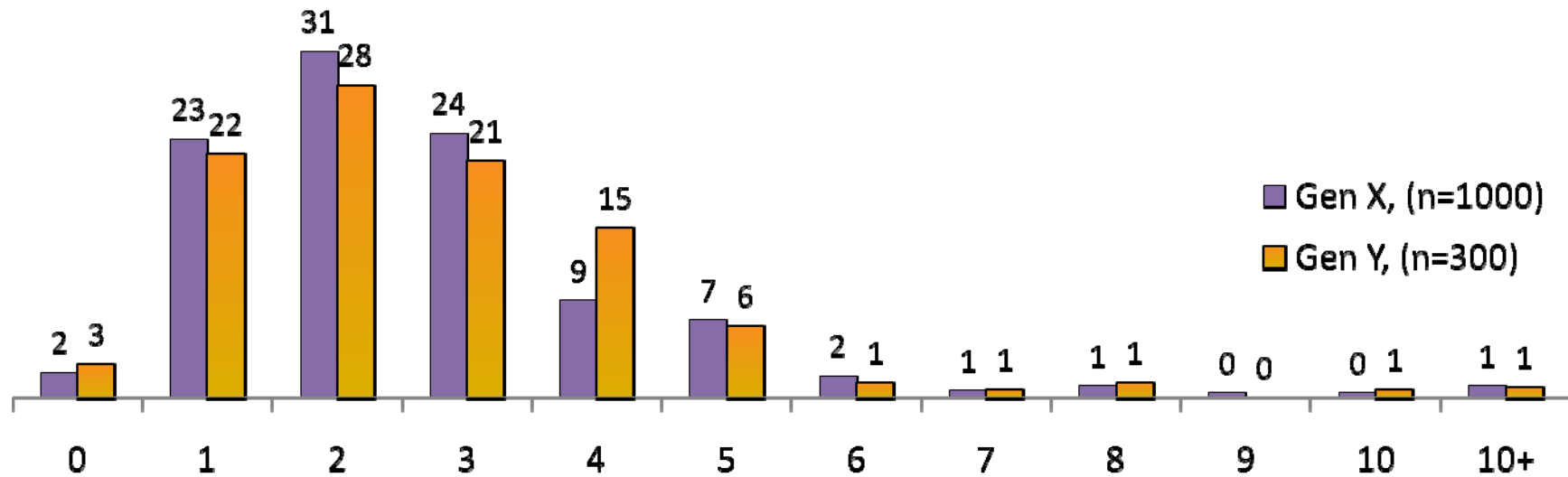
## Servings of Fruit - (Daily Average)



% Respondents

Q10: On average, how many piece of fresh FRUIT, and servings of juice, frozen, canned and dried FRUIT of any sort do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)

**Servings of Fruit - (Daily Average)  
Gen X vs. Gen Y**



% Respondents

Q10: On average, how many piece of fresh FRUIT, and servings of juice, frozen, canned and dried FRUIT of any sort do you eat on a typical day?  
(A serving is about the size of a tennis ball.) (open-ended question)

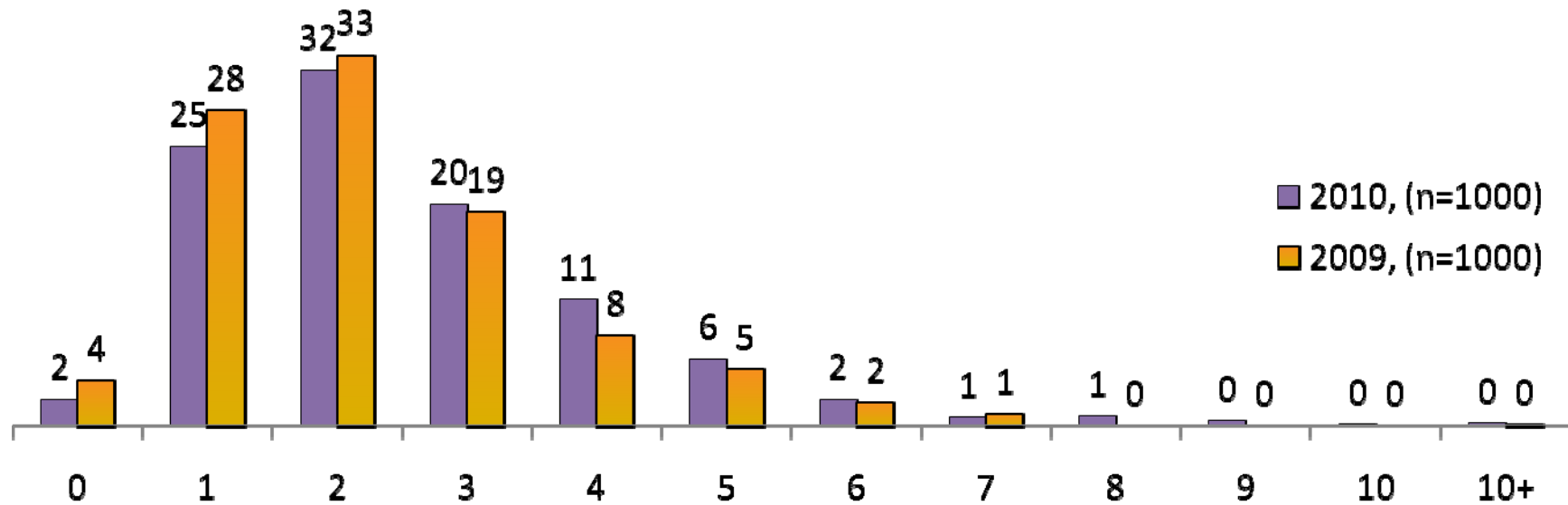
Daily Servings	2010 – VEGETABLES				2009 - VEGETABLES			
	Assumed Conversion to Cups	Correct Conversion to Cups	Variance (%)	n=	Assumed Conversion to Cups	Correct Conversion to Cups	Variance (%)	n=
1	1.09	0.5	+118	248	1.13	0.5	+126	305
2	1.94	1	+94	316	1.96	1	+96	333
3	2.75	1.5	+83	197	2.95	1.5	+97	169
4	3.86	2	+93	112	3.70	2	+85	67
5	5.15	2.5	+106	59	4.43	2.5	+77	42
6	5.07	3	+69	23*	8.18	3	+173	22*
7	3.85	3.5	+10	7*	-	3.5	-	0
8	6.27	4	+57	8*	7.67	4	+92	6*
9	12	4.5	+167	4*	9.00	4.5	+100	1*
10	10	5	+100	1*	-	5	-	0

*Only asked to those who eat more than 0 servings per day*

*\*\*Does not include 2 respondents in 2010 who indicated greater than 10 Daily Servings*

\*Caution: small sample size

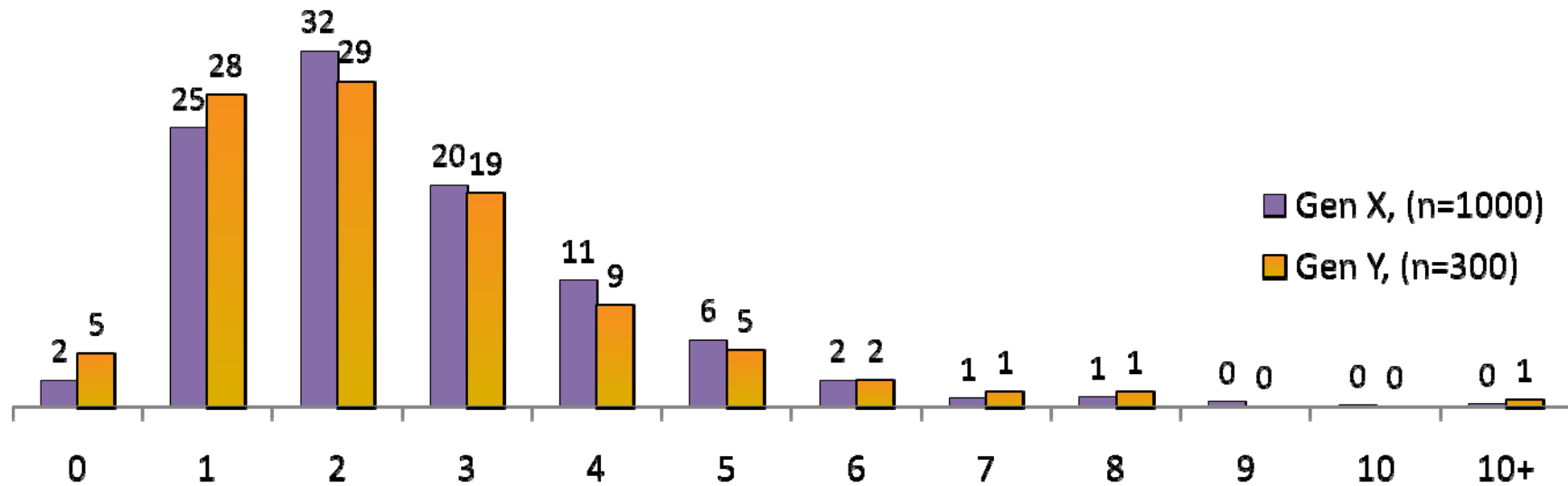
### Servings of Vegetables - (Daily Average)



% Respondents

Q12: On average, how many pieces of fresh, frozen, canned and dried VEGETABLES or VEGETABLE juice of any sort, including salad, and excluding fries and potato chips, do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)

**Servings of Vegetables - (Daily Average)  
Gen X vs. Gen Y**



% Respondents

Q12: On average, how many pieces of fresh, frozen, canned and dried VEGETABLES or VEGETABLE juice of any sort, including salad, and excluding fries and potato chips, do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)



## Average Self-reported Consumption of Fruit and Vegetables varies by income and employment status for Gen X Moms and by amount of physical activity for both Gen X and Gen Y Moms

*How many servings do you personally consume each day?\**

WORK OUTSIDE THE HOME	# of servings of fruit	# of servings of vegetables
No	2.48	2.40
Yes, Part-time	2.47	2.27
Yes, Full-time	3.07	2.90
<b>Total All Gen X Moms</b>	<b>2.68</b>	<b>2.58</b>

Average time per day spent on moderate/vigorous activity (in addition to normal routine)	# of servings of fruit	# of servings of vegetables
Less than 30 minutes	2.21	2.17
30 – 60 minutes	3.07	2.80
More than 60 minutes	4.68	4.56
<b>Total All Gen X Moms</b>	<b>2.68</b>	<b>2.58</b>

HHI	# of servings of fruit	# of servings of vegetables
Less than \$25K	2.39	2.41
\$25K - \$50K	2.23	2.36
\$50K - \$75K	2.55	2.38
\$75K - \$100K	2.72	2.50
\$100K - \$150K	2.55	2.51
\$150K or more	3.58	3.19
<b>Total All Gen X Moms</b>	<b>2.68</b>	<b>2.58</b>

Average time per day spent on moderate/vigorous activity (in addition to normal routine)	# of servings of fruit	# of servings of vegetables
Less than 30 minutes	2.10	2.04
30 – 60 minutes	3.27	2.77
More than 60 minutes	5.6	4.05
<b>Total All Gen Y Moms</b>	<b>2.83</b>	<b>2.48</b>

Q10. On average, how many pieces of fresh FRUIT, and servings of juice, frozen, canned and dried FRUIT of any sort do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)

Q12. On average, how many servings of fresh, frozen, canned and dried VEGETABLES or VEGETABLE juice of any sort, including salad, and excluding fries and potato chips, do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)





## Gen Y Moms were less accurate in converting their reported fruit servings into cups . . .

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*How many cups do you think that is? \*\**

Daily Servings	2010 – FRUIT (GEN X)				2010 – FRUIT (GEN Y)			
	Assumed Conversion to Cups	Correct Conversion to Cups	Variance (%)	n=	Assumed Conversion to Cups	Correct Conversion to Cups	Variance (%)	n=
1	1.08	0.5	+116	230	1.20	0.5	+140	65
2	2.08	1	+108	309	2.33	1	+133	83
3	3.03	1.5	+102	233	2.89	1.5	+93	63
4	4.27	2	+114	86	3.98	2	+99	45
5	4.69	2.5	+88	69	6.00	2.5	+140	19*
6	5.26	3	+75	19*	3.25	3	+8	4*
7	5.97	3.5	+71	6*	2.50	3.5	-29	2*
8	5.72	4	+43	10*	7.00	4	+75	4*
9	4.00	4.5	-11	4*	-	4.5	-	--
10	5.39	5	+8	4*	4.50	5	-10	2*

*Only asked to those who eat more than 0 servings per day*

*\*\*Does not include 8 respondents in 2010 who indicated greater than 10 Daily Servings*

\*Caution: small sample size



Daily Servings	2010 – VEGETABLES (GEN X)				2010 – VEGETABLES (GEN Y)			
	Assumed Conversion to Cups	Correct Conversion to Cups	Variance (%)	n=	Assumed Conversion to Cups	Correct Conversion to Cups	Variance (%)	n=
1	1.82	0.5	+264	248	1.21	0.5	+142	83
2	2.35	1	+135	316	2.11	1	+111	87
3	2.72	1.5	+81	197	3.08	1.5	+105	57
4	2.97	2	+49	112	3.94	2	+97	27*
5	4.69	2.5	+88	59	4.23	2.5	+69	15*
6	4.81	3	+60	23*	5.93	3	+98	7*
7	3.59	3.5	+3	7*	5.25	3.5	+50	4*
8	4.67	4	+17	8*	6.50	4	+63	4*
9	10	4.5	+122	4*	--	4.5	--	--
10	7.65	5	+53	1*	--	5	--	--

Only asked to those who eat more than 0 servings per day

\*\*Does not include 2 respondents in 2010 who indicated greater than 10 Daily Servings

\*Caution: small sample size



## Some Gen X Moms may be reporting higher levels of consumption of both fruit and vegetables because they know they should

### Gen X Moms - 2010

	Self-reported daily consumption of Fruit			
	0	1-5	6-10	>10
We eat too little	91%	54%	37%	11%
We eat just enough	9%	43%	53%	68%
We eat too much	0%	3%	10%	21%

	Self-reported daily consumption of Vegetables			
	0	1-5	6-10	>10
We eat too little	68%	64%	45%	0%
We eat just enough	32%	34%	54%	87%
We eat too much	0%	2%	1%	13%

% Respondents

n=1,000

Amongst Gen X Moms, their self-reported daily consumption of both fruits and vegetables appears to be correlated with their perception as to whether their family is eating too little, just enough or too much fruits and vegetables.

Q15. Which of these statements best represents your family's eating habits for each of the following? (Include fresh, canned, frozen, dried, and 100% juice) /Q10. On average, how many pieces of fresh FRUIT, and servings of juice, frozen, canned and dried FRUIT of any sort do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)/Q12. On average, how many servings of fresh, frozen, canned and dried VEGETABLES or VEGETABLE juice of any sort, including salad, and excluding fries and potato chips, do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)



While some Gen Y Moms may also be reporting higher levels of consumption of both fruit and vegetables because they know they should, this influence is less pronounced than amongst Gen X Moms

### Gen Y Moms - 2010

	Self-reported daily consumption of Fruit			
	0	1-5	6-10	>10
We eat too little	78%	49%	25%	33%
We eat just enough	22%	44%	42%	33%
We eat too much	0%	7%	33%	33%

	Self-reported daily consumption of Vegetables			
	0	1-5	6-10	>10
We eat too little	86%	53%	40%	0%
We eat just enough	14%	42%	53%	100%
We eat too much	0%	5%	7%	0%

% Respondents

n=300

Amongst Gen Y Moms, their self-reported daily consumption of both fruits and vegetables also appears to be somewhat correlated with their perception as to whether their family is eating too little, just enough or too much fruits and vegetables but the influence is not as strong as amongst Gen X Moms.

Q15. Which of these statements best represents your family's eating habits for each of the following? (Include fresh, canned, frozen, dried, and 100% juice) /Q10. On average, how many pieces of fresh FRUIT, and servings of juice, frozen, canned and dried FRUIT of any sort do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)/Q12. On average, how many servings of fresh, frozen, canned and dried VEGETABLES or VEGETABLE juice of any sort, including salad, and excluding fries and potato chips, do you eat on a typical day? (A serving is about the size of a tennis ball.) (open-ended question)





# Making the logo more eye-catching may help increase its appeal to Gen X Moms

## Why do you say that [logo was not very/not at all motivating]?

Not Very/Not at All Motivating  
(2010 – 23%; 2009 – 23%; 2008 - 26%; 2007 - 28%)

	'10	'09	'08	'07
	%	%	%	%
Does not/cannot motivate me to eat more fruits and veggies	37	26	43	27
Doesn't grab my attention	23	31	18	4
Already know that	20	12	12	18
Not enough information on it	10	13	12	9
I am not familiar with the program	10	9	12	52
Did not provide any suggested strategy	1	3	5	4



See Appendix slide 99 for more detail

*Note: In 2010 and 2009, this question was only asked to those who are aware of logo and not to those who responded very/not at all motivated by Fruits & Veggies-More Matters™*



## While the sample size was very small, Gen Y Moms appear more likely to want more information on the logo

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Why do you say that [logo was not very/not at all motivating]?

Not Very/Not at All Motivating  
(Gen X – 23%; Gen Y – 16%)

	Gen X	Gen Y*
	%	%
Does not/cannot motivate me to eat more fruits and veggies	37	19
Doesn't grab my attention	23	24
Already know that	20	19
Not enough information on it	10	19
I am not familiar with the program	10	19
Did not provide any suggested strategy	1	0

Responses Attached



\*Caution – small sample size

Gen X (n=100)

Gen Y (n=21)

***PBH wishes to thank **Bayer and PMA**  
for their support of this research***



Bayer CropScience

