



**PRODUCE FOR BETTER HEALTH
FOUNDATION: Gen X/Y Moms Study
(Round 6)**

Report – March 24, 2011



Research funded by:



Bayer



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Objectives

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Specific Research Objectives

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

Methodological notes

- 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 
- New questions added to the survey in 2011 have been noted throughout
- Points of interest are called out and noted by an arrow
- Statistically significant differences between Lower Income (<\$25k) and Higher Income Moms have been called out throughout this report

Methodology

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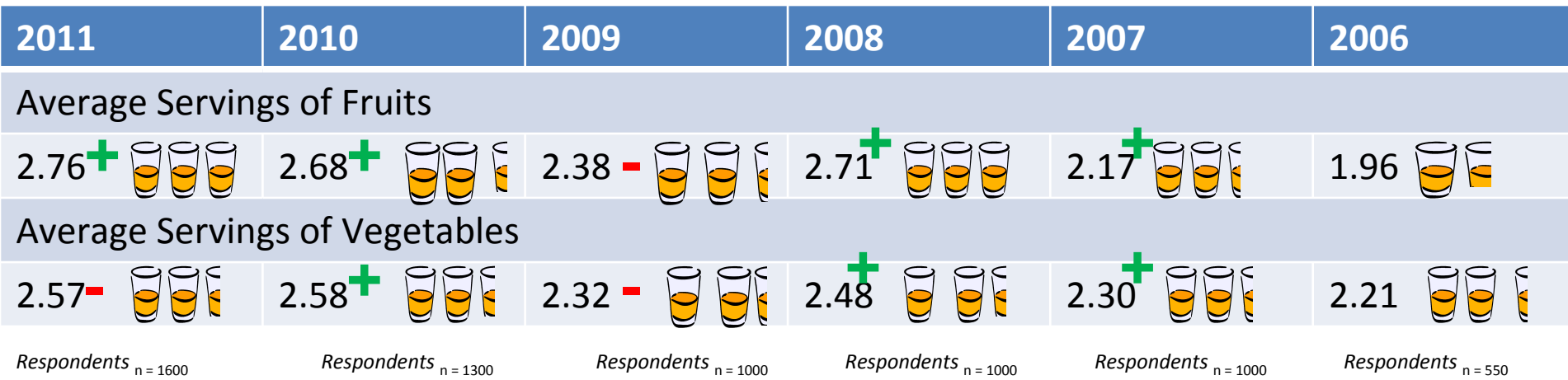
METHODOLOGY						
Wave	Round 6 (2011)	Round 5 (2010)	Round 4 (2009)	Round 3 (2008)	Round 2 (2007)	Round 1 (2006)
Survey Type	Online survey conducted via an online panel	Online survey conducted via an online panel	Online survey conducted via an online panel	Online survey conducted via an online panel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



Consumption and Attitudes

In 2011, Gen X Moms self-reported they consumed more servings of fruits while their consumption of vegetables remained flat

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



*Find full table of data in Appendix slides 114-115, 117-118





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.)

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.)

In 2011, Gen Y Moms self-reported eating more servings of both fruits and vegetables than Gen X Moms

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

2011: Gen X vs. Gen Y

Gen X	Gen Y
Average Servings of Fruits	
2.62 	3.22 
Average Servings of Vegetables	
2.54 	2.68 

Gen X, n=1230
Gen Y, n=370





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.)

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.)

In 2011, Higher Income Moms self-reported eating more servings of both fruits and vegetables

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

2011: Lower Income vs. Higher Income

Lower Income	Higher Income
Average Servings of Fruits	
2.55 	2.74 
Average Servings of Vegetables	
2.23 	2.59 

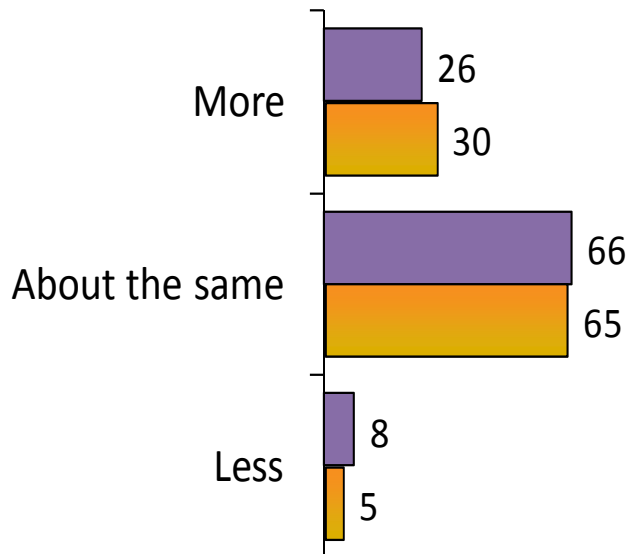
Lower Income, n=300
Higher Income, n=1300

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.)

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.)

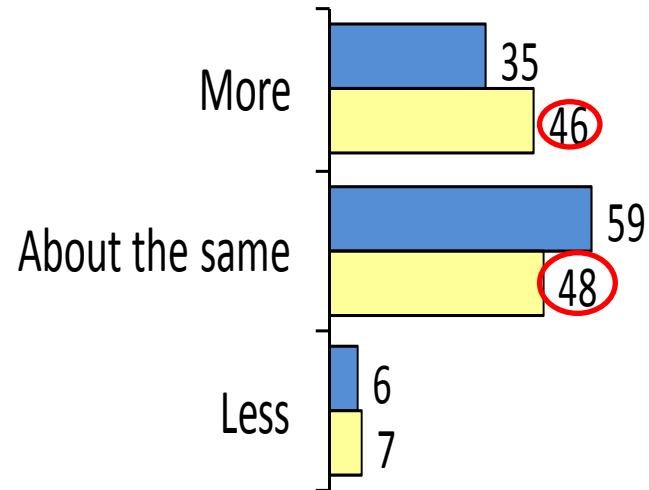
Gen X Moms self-reported buying the same amount of fruit compared to a year earlier while Gen Y Moms self-reported an increase

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



2010 Gen X, n=1000
2011 Gen X, n=1230

% Respondents



2010 Gen Y, n=300
2011 Gen Y, n=370

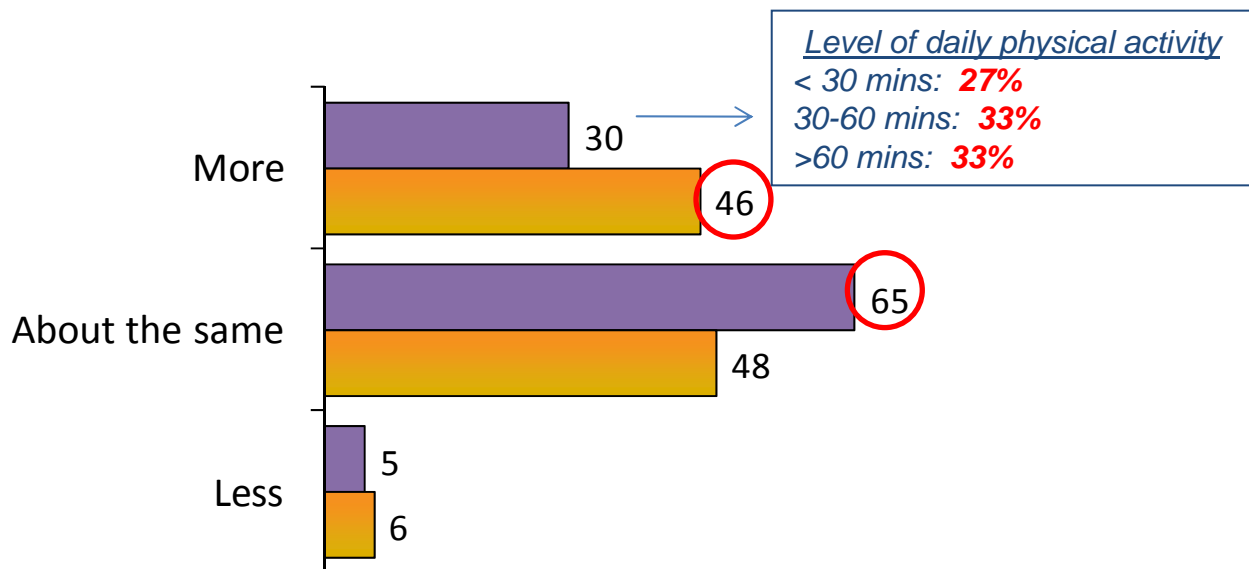
○ Denotes a statistically significant difference between respondent groups

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

Q19. Did you buy less, more or about the same amount of fruit in the past three months compared to one year earlier?

Gen Y Moms were much more likely to self-report an increase year over year compared to Gen X Moms

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: +25%
 Gen Y: +40%

% Respondents

Gen X, n=1230
 Gen Y, n=370

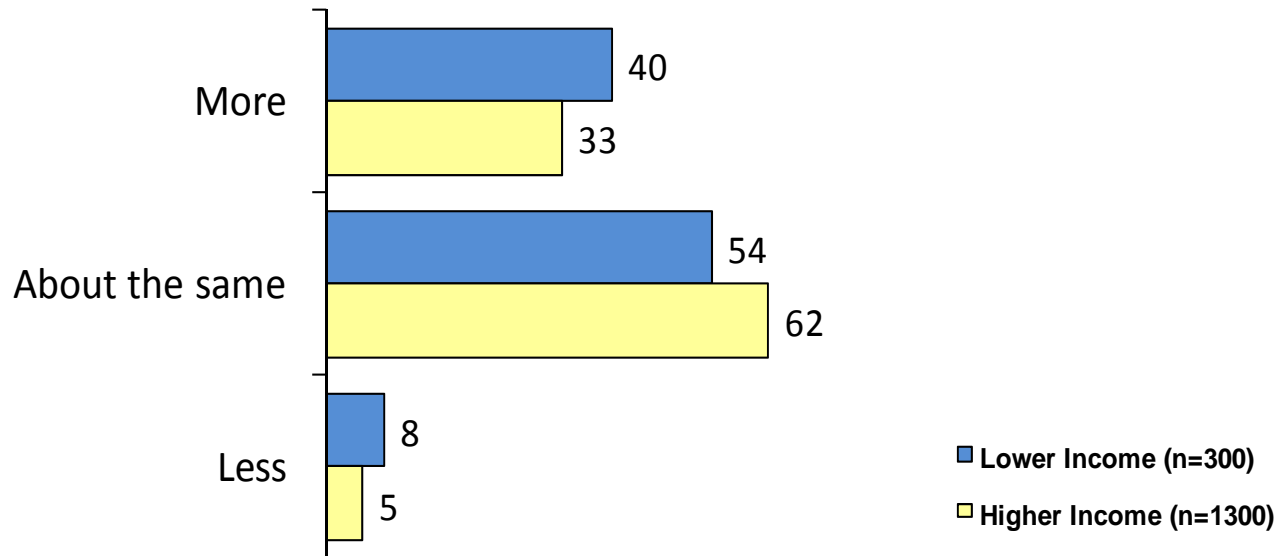
Denotes a statistically significant difference between respondent groups

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


Q19. Did you buy less, more or about the same amount of fruit in the past three months compared to one year earlier?

Income was not a significant factor in self-reported changes in fruit consumption over the last year

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



% Respondents

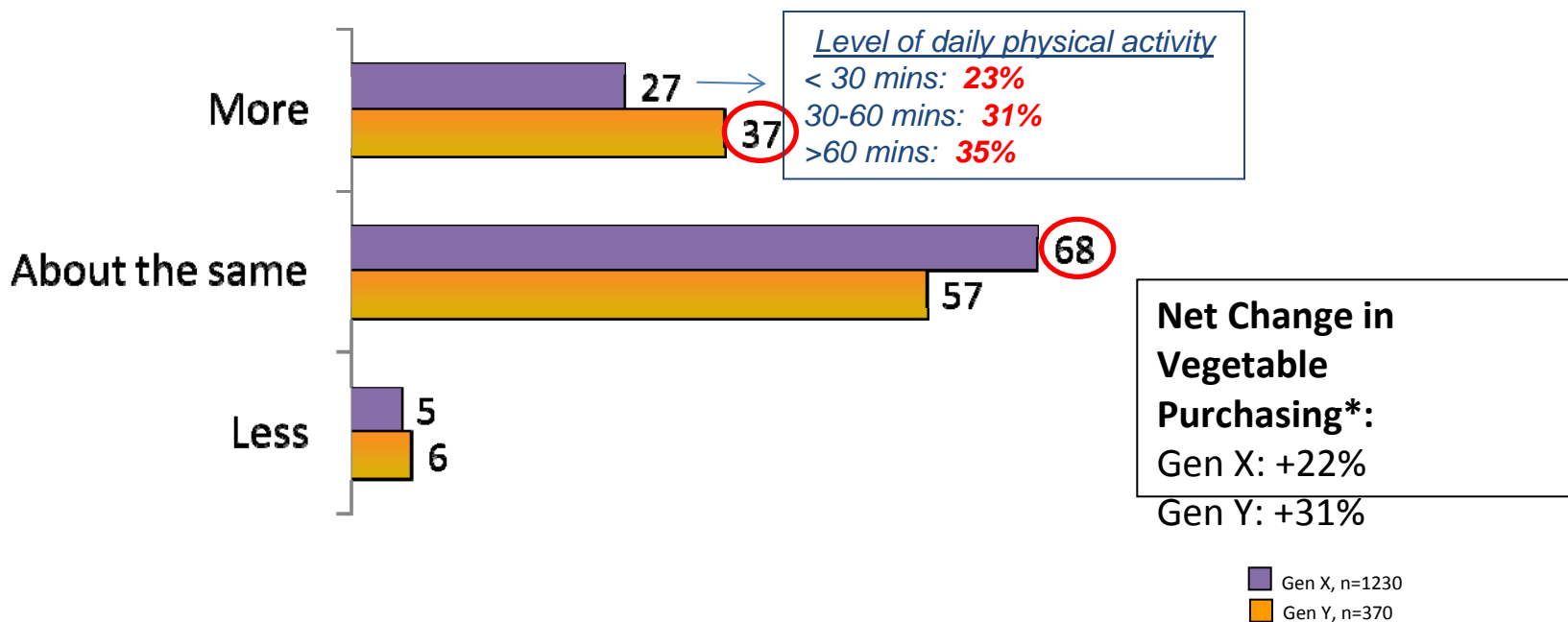
 Denotes a statistically significant difference between respondent groups

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

Q19. Did you buy less, more or about the same amount of fruit in the past three months compared to one year earlier?

Gen Y Moms were much more likely to self-report an increase year over year compared to Gen X Moms

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



% Respondents

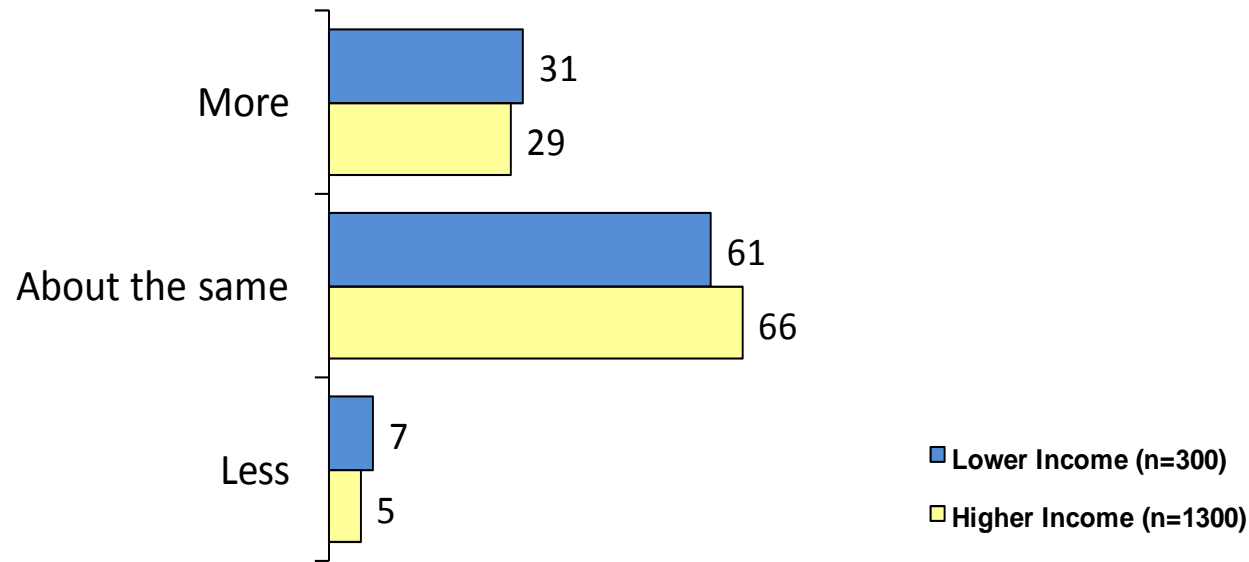
○ Denotes a statistically significant difference between respondent groups


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

Q20. Did you buy less, more or about the same amount of vegetables in the past three months compared to one year earlier?

Income was also not a significant factor in self-reported changes in vegetable consumption over the last year

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



 Denotes a statistically significant difference between respondent groups

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

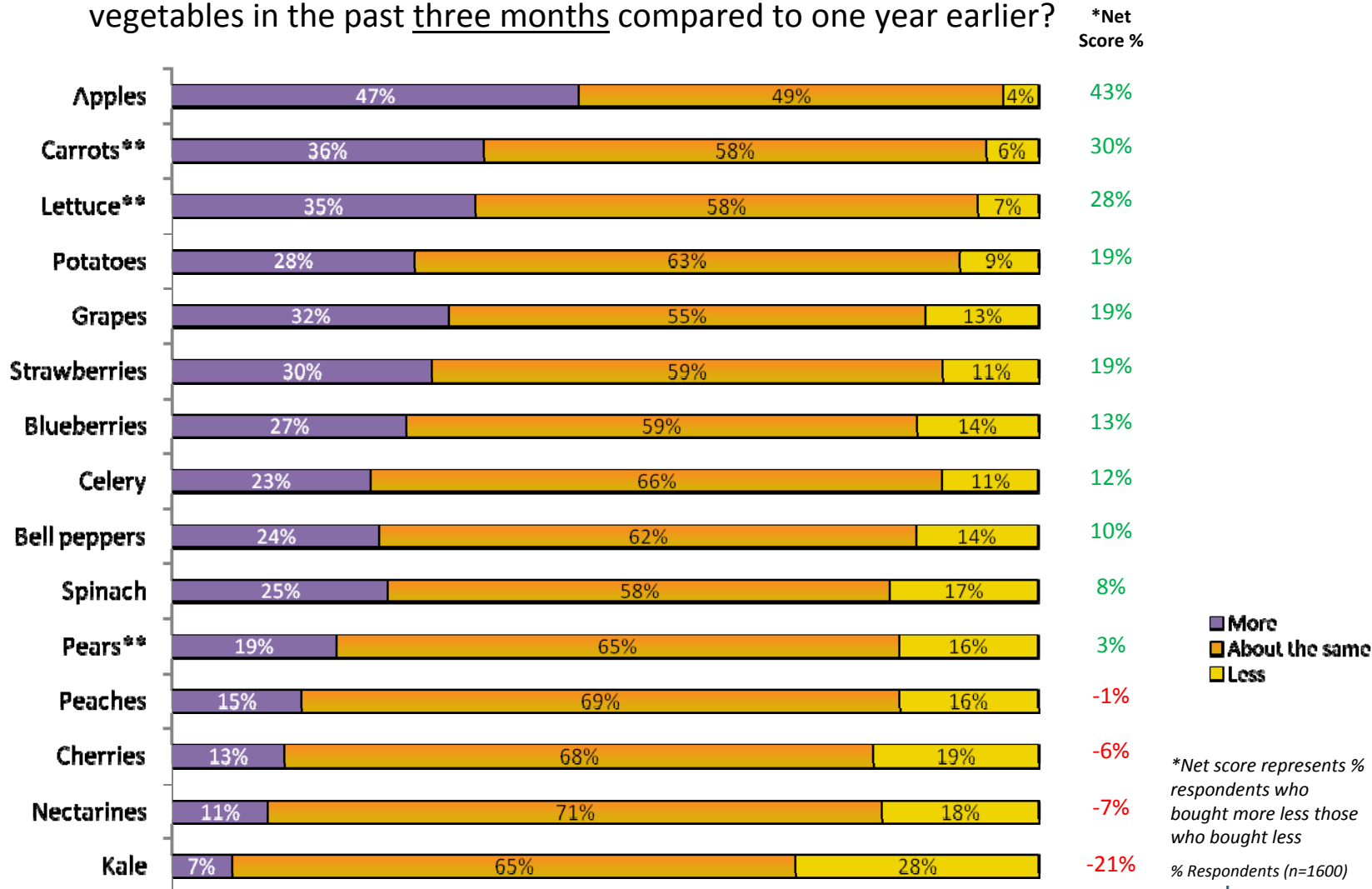
Q20. Did you buy less, more or about the same amount of vegetables in the past three months compared to one year earlier?

Moms reported buying more of most fruits and vegetables in the last 3 months, especially apples, carrots and lettuce



for 2011

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



**Not one of the "Dirty Dozen"



Gen X and Gen Y Moms

	More		About the same		Less	
	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income
Potatoes			52%	64%		
Blueberries					25%	13%
Celery					19%	10%
Spinach	19%	26%				
Pears**					24%	16%
Cherries			54%	69%	31%	19%
Nectarines			63%	71%	25%	18%
Kale			54%	67%	41%	27%

% Respondents (n=1600)

Note: If no data shown, this signifies there is no statistically significant difference between Lower Income and Higher Income moms

**Not one of the "Dirty Dozen"



Q23. Did you buy less, more or about the same amount of the below fruits and vegetables in the past three months compared to one year earlier?

Why did you buy more...? Gen X and Gen Y Moms

	Weighted Average	Apples (n=783)	Carrots (n=588)	Lettuce (n=579)	Potatoes (n=468)	Strawberries (n=493)	Grapes (n=529)	Blueberries (n=448)	Celery (n=375)	Bell peppers (n=400)	Spinach (n=419)	Pears (n=310)	Peaches (n=243)	Cherries (n=214)	Nectarines (n=186)	Kale (n=110)
My family likes them	68%	82%	70%	60%	72%	84%	85%	71%	44%	52%	47%	73%	69%	67%	72%	29%
Nutritious	52%	57%	61%	52%	31%	53%	49%	64%	38%	44%	71%	46%	45%	42%	48%	54%
Taste	47%	50%	44%	36%	46%	61%	56%	49%	28%	45%	39%	53%	49%	65%	62%	29%
Easy to prepare	44%	37%	54%	58%	60%	44%	39%	39%	42%	42%	49%	34%	34%	25%	38%	34%
Readily available	44%	53%	48%	49%	46%	48%	49%	32%	36%	37%	35%	38%	45%	38%	44%	23%
Cost	32%	33%	38%	36%	50%	28%	26%	27%	33%	22%	25%	32%	31%	25%	26%	22%
Quality	25%	24%	25%	22%	20%	34%	26%	25%	13%	20%	25%	29%	30%	28%	29%	27%
New preparation ideas	22%	9%	29%	22%	41%	15%	4%	17%	32%	47%	38%	8%	12%	12%	9%	53%
Organic varieties available	13%	15%	16%	13%	8%	10%	8%	15%	9%	8%	19%	11%	14%	12%	14%	23%
Less concern about food-borne illness with this product than others	4%	4%	4%	2%	6%	4%	4%	3%	3%	4%	4%	5%	4%	8%	3%	9%
Other	4%	6%	5%	4%	2%	3%	2%	4%	11%	5%	3%	5%	7%	3%	2%	7%

Click on Excel file for "Other" Responses



% Respondents answering "More" in Q23. Apple Carrot Lettuce Potato Strawberry Grape Blueberry Celery Bell Pepper Spinach Pear Peach Cherry Nectarine Kale

Q24/26/28/30/32/34/36/38/40/42/44/46/48/50/52. Why did you buy more peaches/celery/apples/bell peppers/cherries/grapes/nectarines/kale/potatoes/blueberries/spinach/strawberries/pears/carrots/lettuce?

Why did you buy more...? Gen X and Gen Y Moms

	Apples (n=783)		Carrots (n=588)		Potatoes (n=468)		Strawberries (n=493)		Cherries (n=214)		Blueberries (n=448)		Celery (n=375)		Bell peppers (n=400)		Peaches (n=243)		Kale (n=110)	
	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income
My family likes them											89%	71%					85%	68%		
Nutritious																			96%	51%
Taste	63%	49%									68%	48%								
Readily available							29%	49%	17%	40%										
Cost															40%	21%			4%	23%
Organic varieties available			6%	17%					1%	13%									4%	24%
Easy to prepare																				
Other			39%	55%	45%	62%								1%	12%	1%	6%			

Click on Excel file for "Other" Responses



Apple



Carrot



Potato



Strawberry



Cherry



Blueberry



Celery



Bell Pepper



Peach



Kale

Click on Excel file for "Other" Responses

Note: If no data inserted, this signifies there are no statistically significant difference

% Respondents answering "More" in Q23.

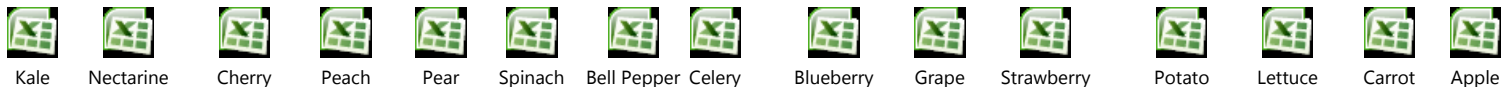
Q24/26/28/30/32/34/36/38/40/42/44/46/48/50/52. Why did you buy more peaches/celery/apples/bell peppers/cherries/grapes/nectarines/kale/potatoes/blueberries/spinach/strawberries/pears/carrots/lettuce?

The main drivers of decreases were family preference and cost – *diet was a key driver in the decrease of potato purchases*



Why did you buy less...? Gen X and Gen Y Moms

	Weighted Average	Kale (n=458)	Nectarines (n=300)	Cherries (n=321)	Peaches (n=262)	Pears (n=271)	Spinach (n=274)	Bell peppers (n=223)	Celery (n=181)	Blueberries (n=224)	Grapes (n=209)	Strawberries (n=189)	Potatoes (n=145)	Lettuce (n=119)	Carrots (n=104)	Apples (n=68)
My family doesn't like them	39%	62%	41%	33%	33%	51%	59%	48%	62%	31%	10%	5%	8%	25%	31%	23%
Cost	31%	5%	30%	53%	36%	24%	13%	29%	14%	54%	60%	67%	11%	25%	14%	41%
Quality	13%	3%	14%	6%	24%	19%	7%	5%	5%	11%	23%	33%	5%	31%	14%	21%
Taste	10%	15%	7%	6%	9%	7%	16%	15%	16%	6%	9%	9%	4%	7%	16%	11%
Unavailable where my family shops	7%	10%	14%	13%	10%	7%	2%	-	-	7%	5%	8%	-	1%	1%	-
Need preparation ideas	6%	8%	2%	2%	3%	4%	8%	6%	14%	4%	1%	2%	7%	12%	12%	7%
Time consuming to prepare	5%	4%	3%	2%	3%	2%	4%	4%	6%	4%	1%	4%	23%	10%	11%	5%
Concern about pesticide residue	4%	2%	3%	3%	5%	2%	6%	1%	3%	1%	5%	6%	6%	8%	1%	6%
Concern about food-borne illness	2%	1%	1%	-	-	1%	8%	-	1%	-	1%	3%	3%	4%	-	-
Other	12%	10%	8%	8%	12%	6%	9%	13%	8%	9%	12%	14%	54%	20%	21%	16%



Click on Excel file for "Other" Responses

% Respondents answering "Less" in Q23.

Why did you buy less...? Gen X and Gen Y Moms

	Lettuce (n=579)		Potatoes (n=468)		Blueberries (n=448)		Celery (n=375)		Pears (n=310)		Peaches (n=243)		Cherries (n=214)		Nectarines (n=186)	
	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income	Lower Income	Higher Income
My family doesn't like them							44%	65%	34%	52%						
Cost			33%	9%	37%	57%							36%	55%	49%	30%
Quality					2%	13%					12%	25%				
Time consuming to prepare			7%	24%												
Other	2%	21%	26%	56%	2%	10%										

Click on Excel file for "Other" Responses



Lettuce



Potato



Blueberry



Celery



Pear



Peach



Cherry



Nectarine

Note: If no data inserted, this signifies there are no statistically significant difference

% Respondents answering "Less" in Q23.

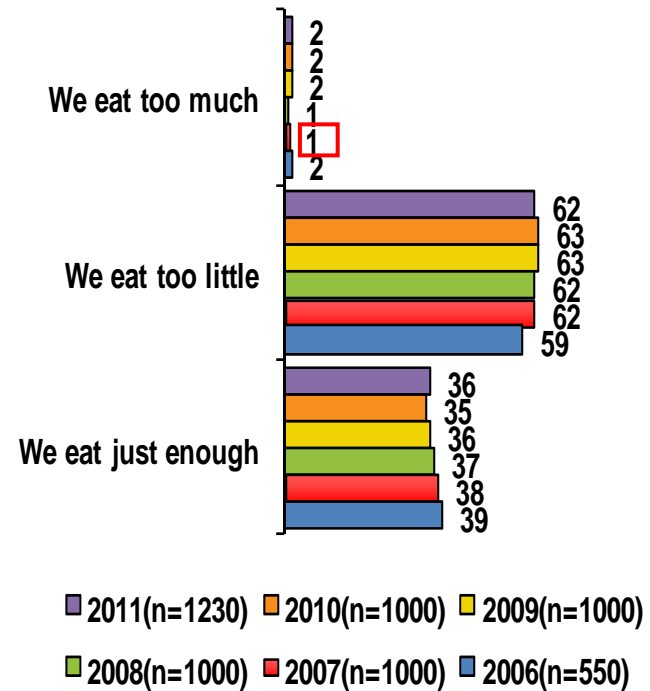
Most Gen X Moms continue to believe that their family's eat too little fruit and vegetables

The family's consumption of FRUIT



% Respondents

The family's consumption of VEGETABLES



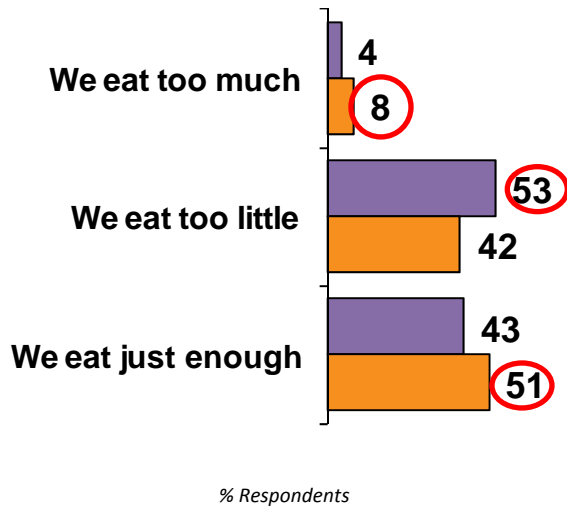
% Respondents

○ = significantly higher than previous wave

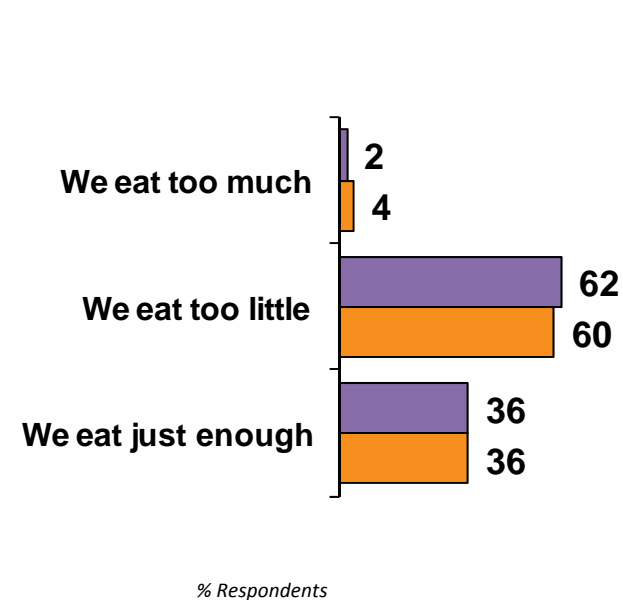
□ = significantly lower than previous wave

Gen X Moms were more likely to believe their families eat too little fruit compared to Gen Y Moms

The family's consumption of FRUIT



The family's consumption of VEGETABLES

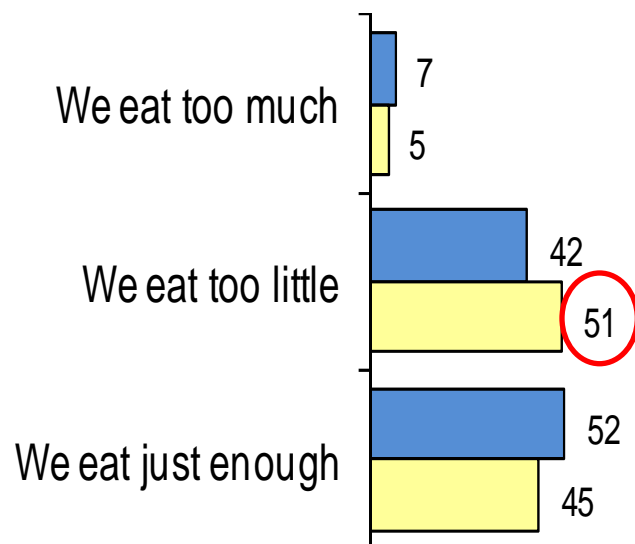


Gen X, n=1230
Gen Y, n=370

○ Denotes a statistically significant difference between respondent groups

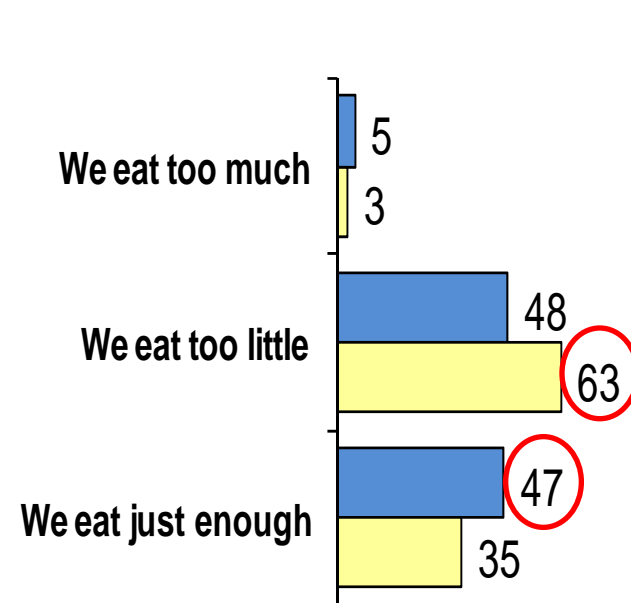
Higher Income Moms were more likely to believe they eat too little fruit and vegetables while Lower Income Moms more likely to believe they eat just enough vegetables

The family's consumption of FRUIT



% Respondents

The family's consumption of VEGETABLES



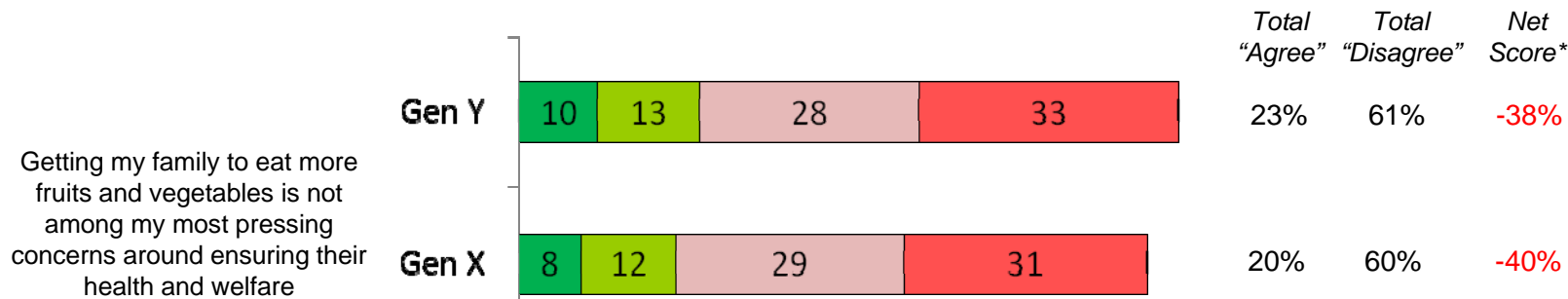
% Respondents

■ Lower Income, n=300
■ Higher Income, n=1300

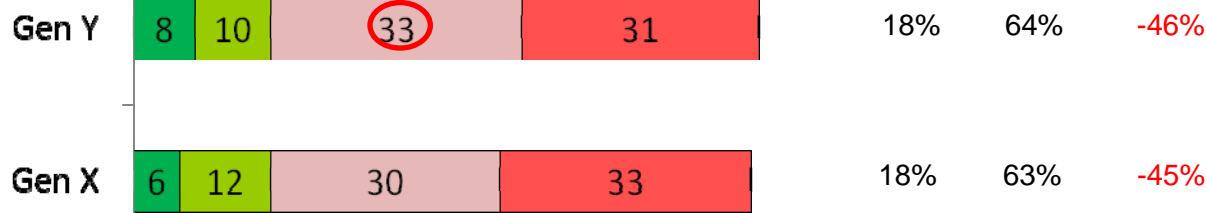
○ Denotes a statistically significant difference between respondent groups

Gen X and Gen Y Moms are equally motivated to get their families to eat more fruits and vegetables

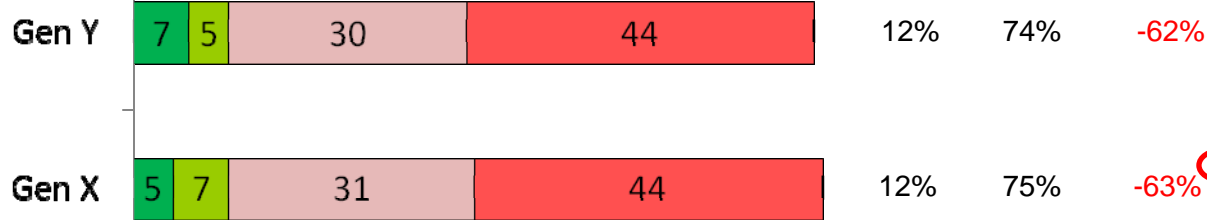
Please review the following statements and tell us your level of agreement or disagreement:



I am not strongly motivated to try and feed my family more fruits and vegetables because I know that they already get enough



Getting my family to eat even more fruits and vegetables than they do already is not worth the struggle



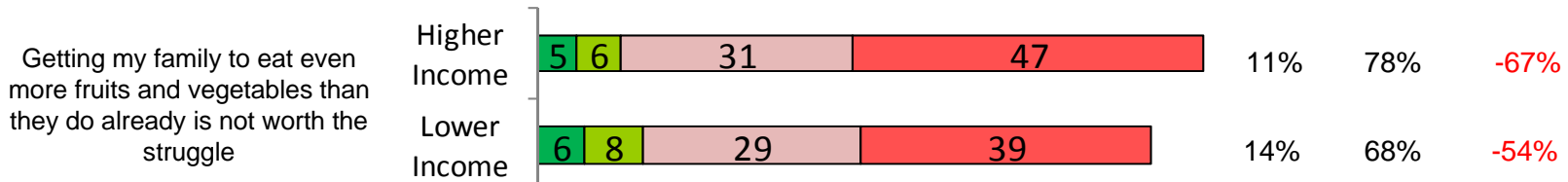
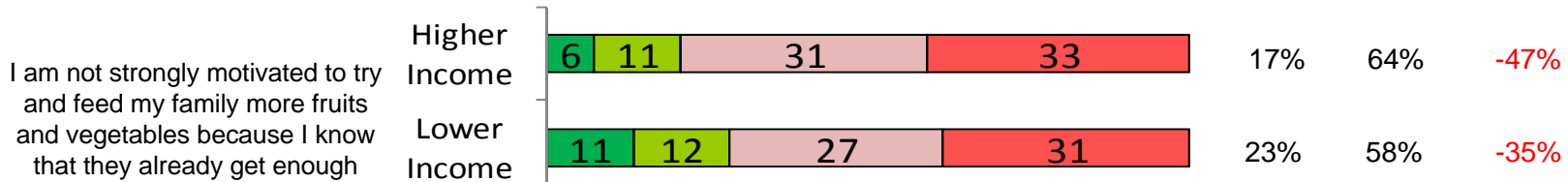
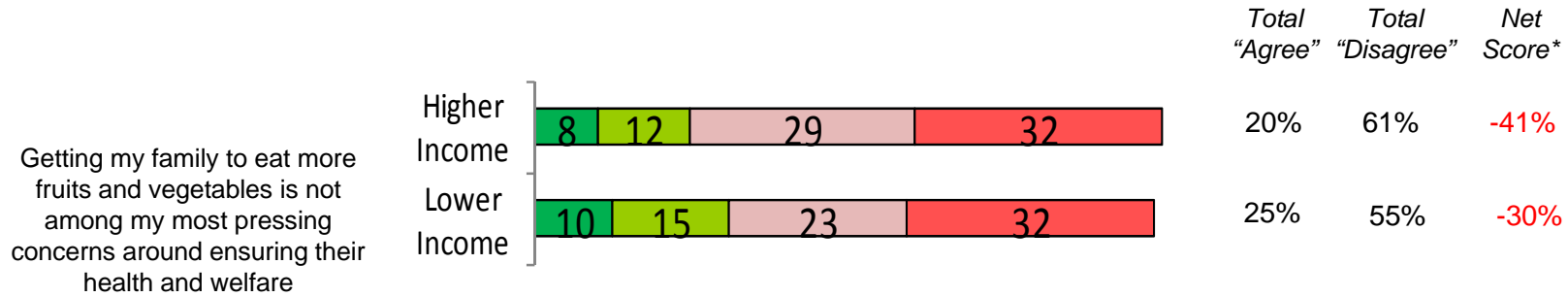
○ Denotes a statistically significant difference between respondent groups

■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree

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

Lower Income Moms directionally appear to be less motivated to get their families to eat more fruits and vegetables

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



Lower Income n=300

Higher Income, n=1300

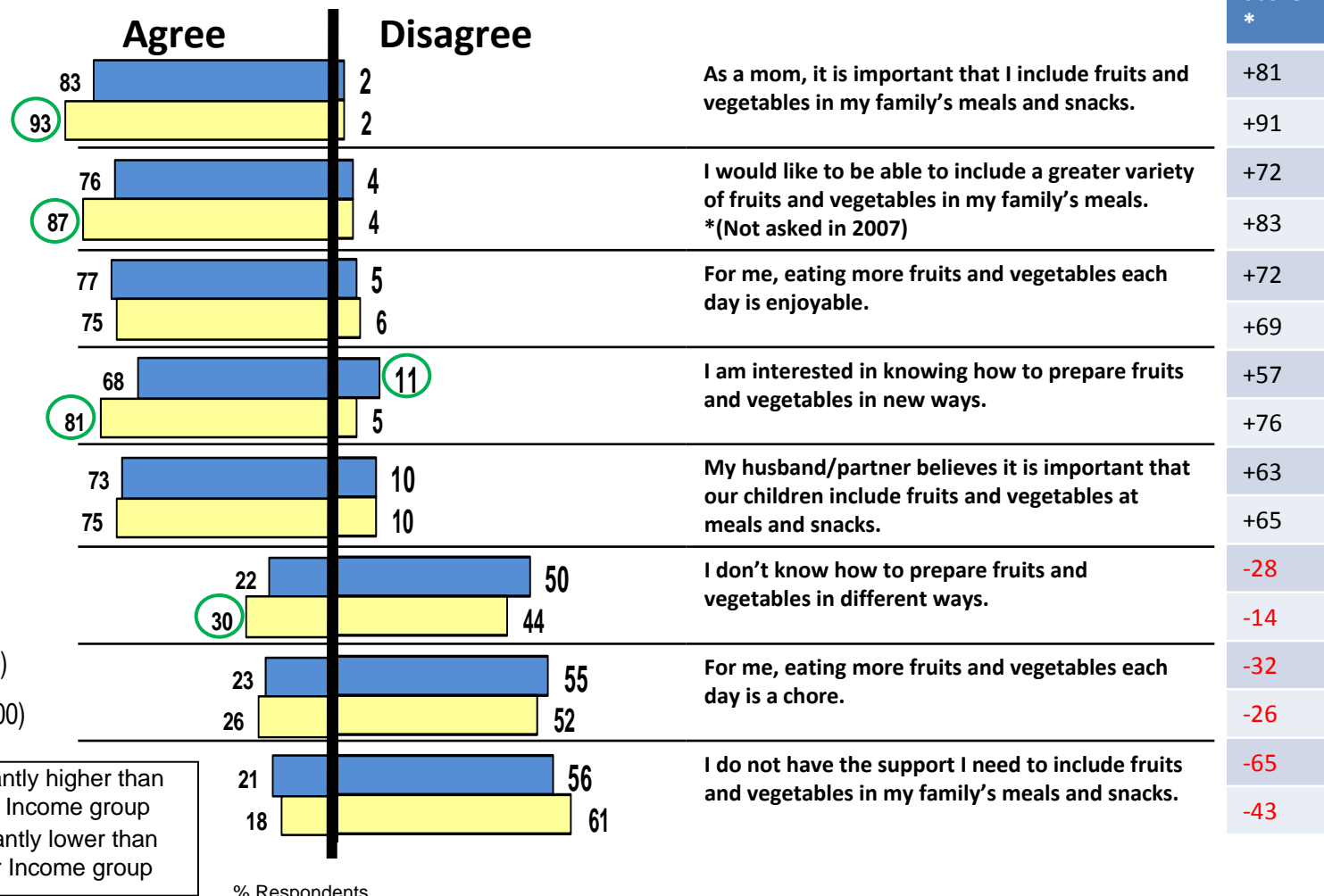
% Respondents



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

Higher Income Moms were more likely 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:



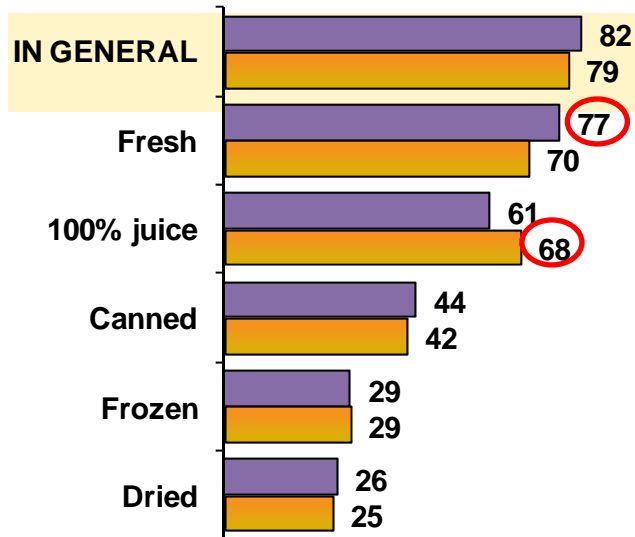
% Respondents

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

In 2011, Gen X Moms more likely than Gen Y moms to make fresh fruits and vegetables available in their homes. Gen Y moms were more likely to make 100% fruit juice available.

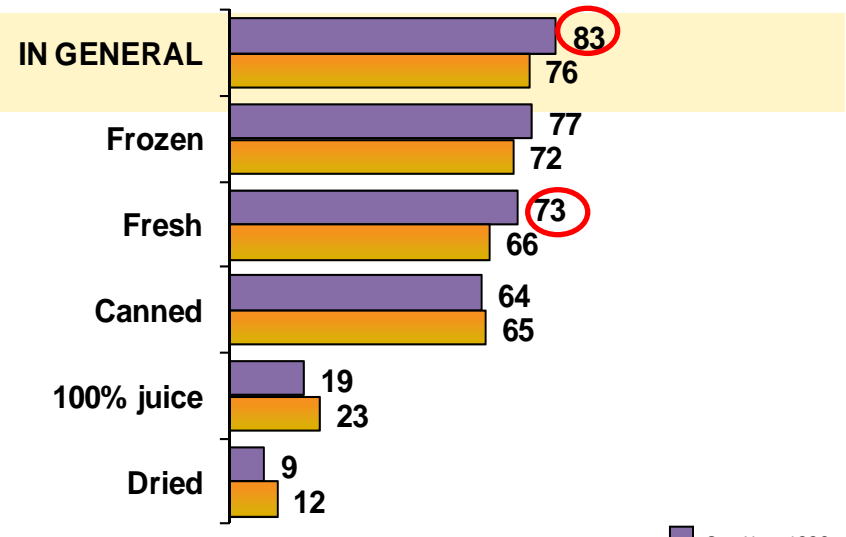
How available are fruits and vegetables in your home?

FRUITS



% Respondents (Available)

VEGETABLES



% Respondents (Available)

Gen X, n=1230
 Gen Y, n=370

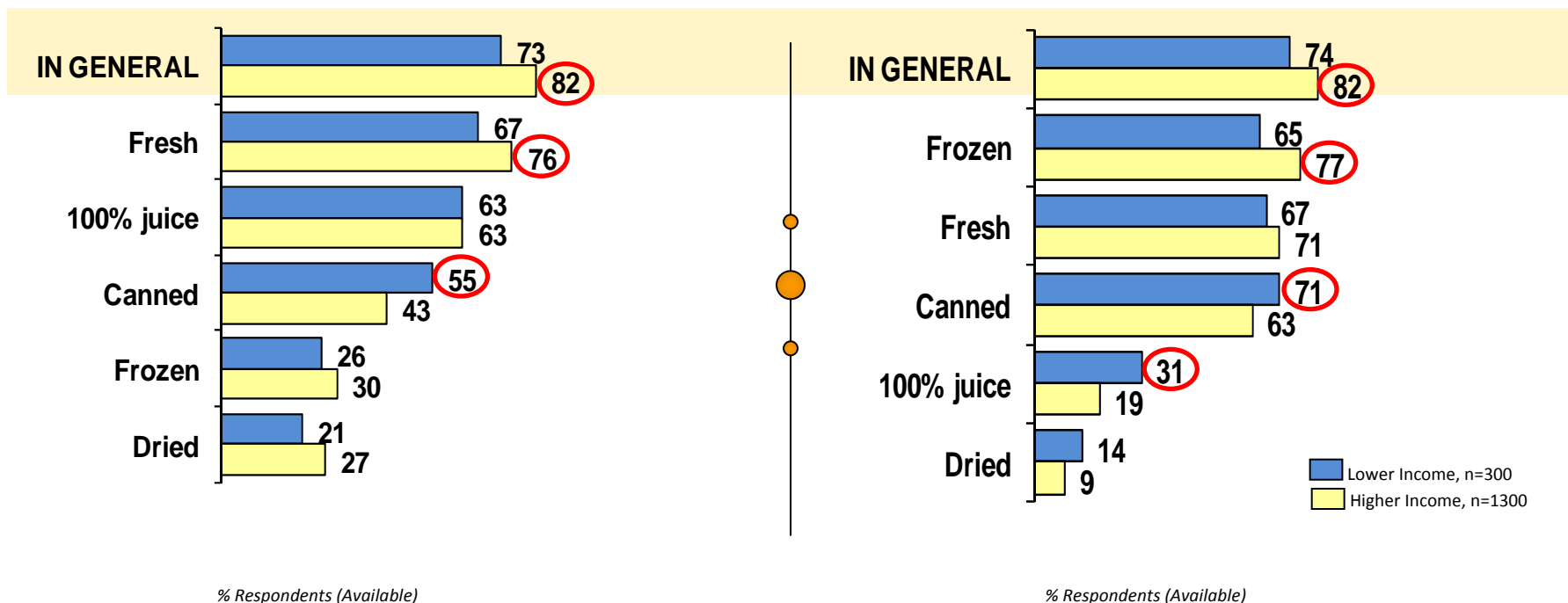
○ Denotes a statistically significant difference between respondent groups

In 2011, Higher Income Moms more likely to make fresh fruits and vegetables available in their homes. Lower Income Moms were more likely to make canned fruits and vegetables available.

How available are fruits and vegetables in your home?

FRUITS

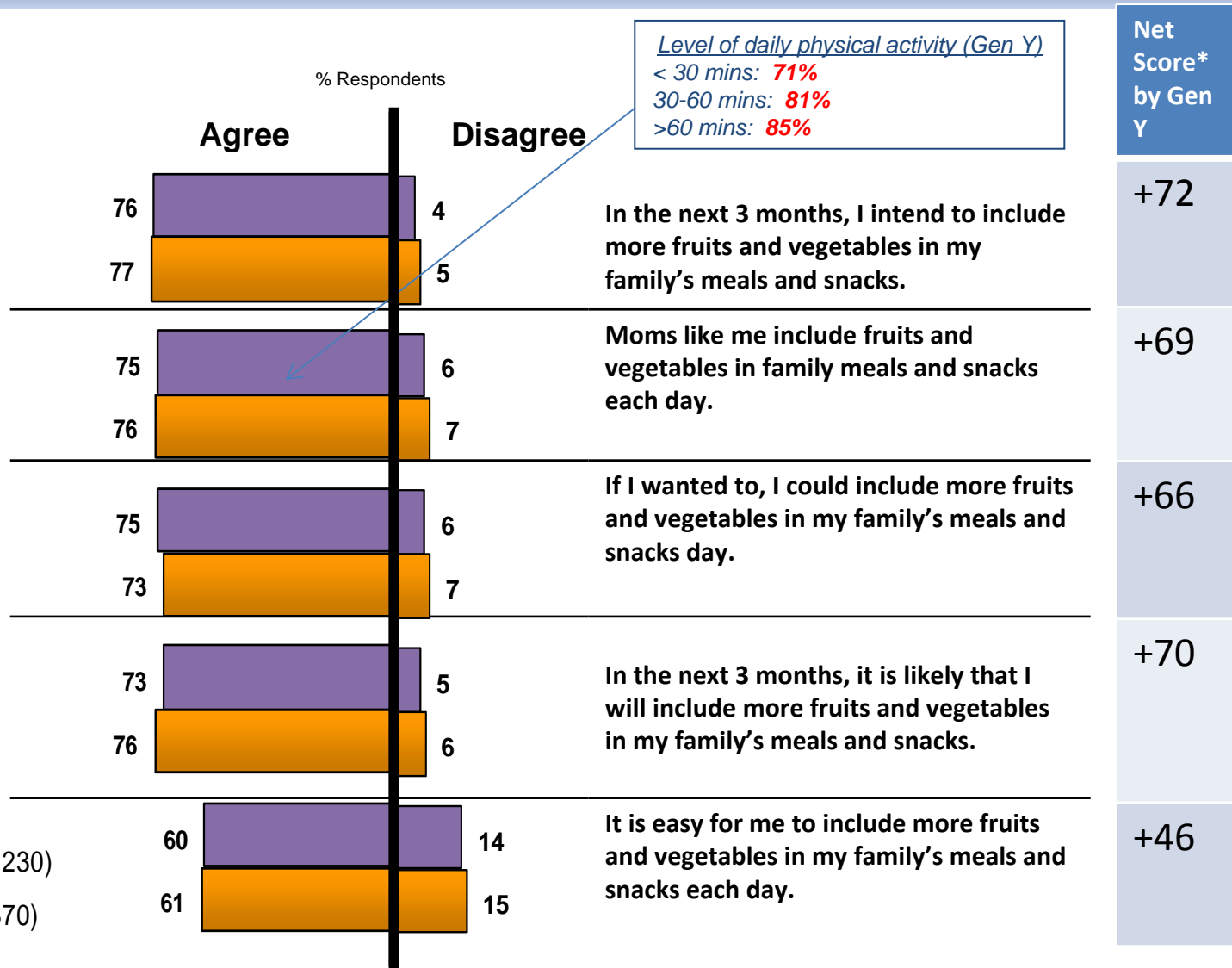
VEGETABLES



Denotes a statistically significant difference between respondent groups

In a series of questions regarding intention and perceived control, Gen X and Gen Y Moms did not differ significantly

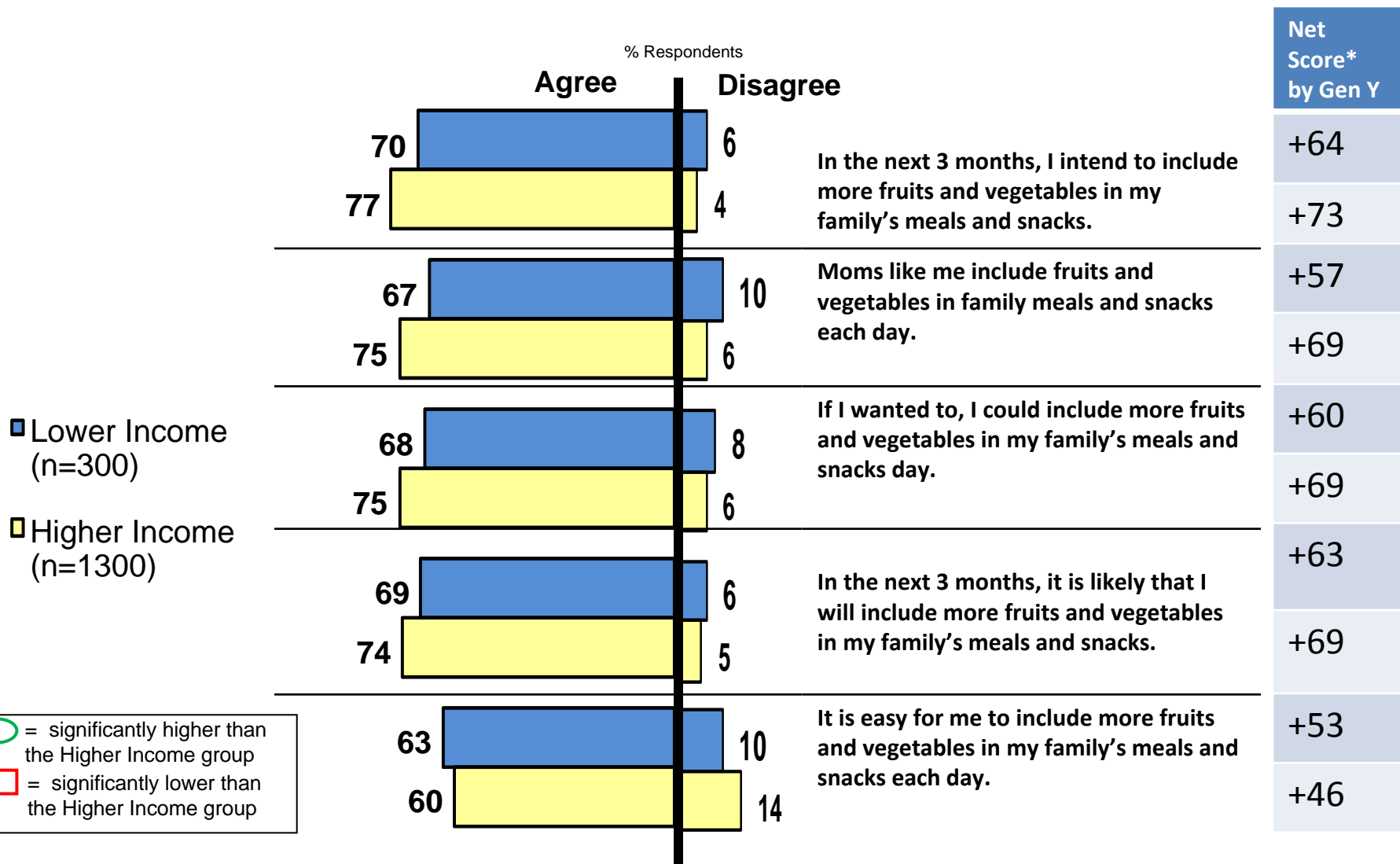
Level of daily physical activity (Gen Y)
 < 30 mins: **71%**
 30-60 mins: **81%**
 >60 mins: **85%**



■ Gen X (n=1230)
 ■ Gen Y (n=370)

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

There were also no significant differences regarding intention and perceived control based on Income

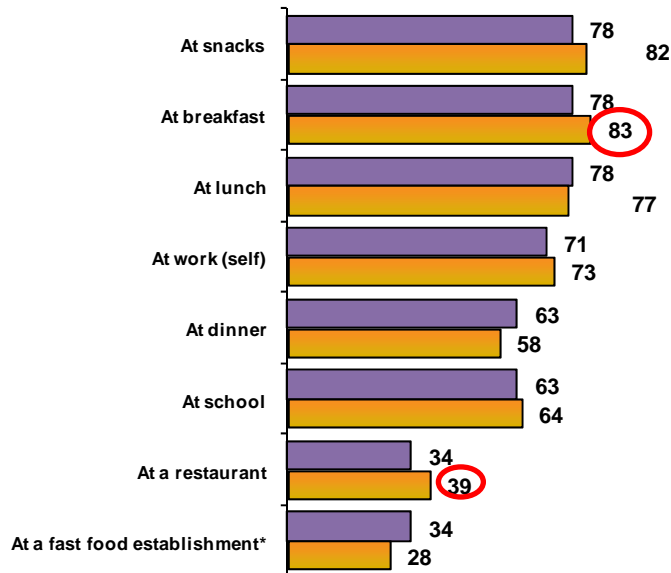


*Net score represents % respondents who agreed with the statement less those who disagreed with any given statement.

In 2011, Gen Y Moms found it somewhat easier than Gen X Moms to get their families to eat fruit at breakfast and vegetables in several different contexts

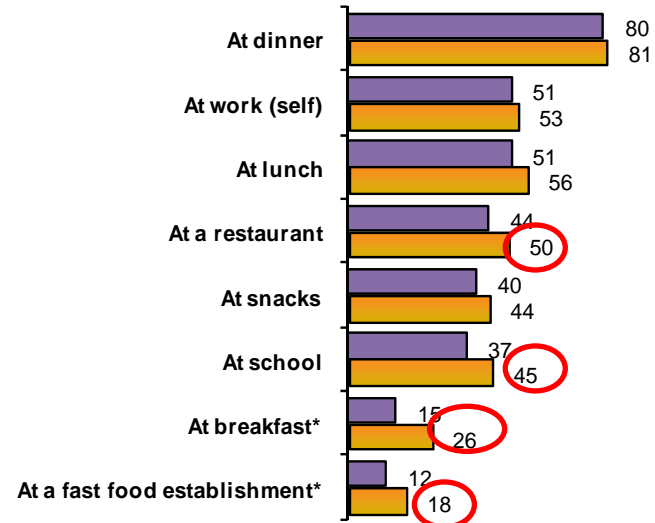
How easy is it for you to get your family to eat fruit and vegetables at different times throughout the day?

FRUIT



% Respondents (Easy)

VEGETABLES



% Respondents (Easy)

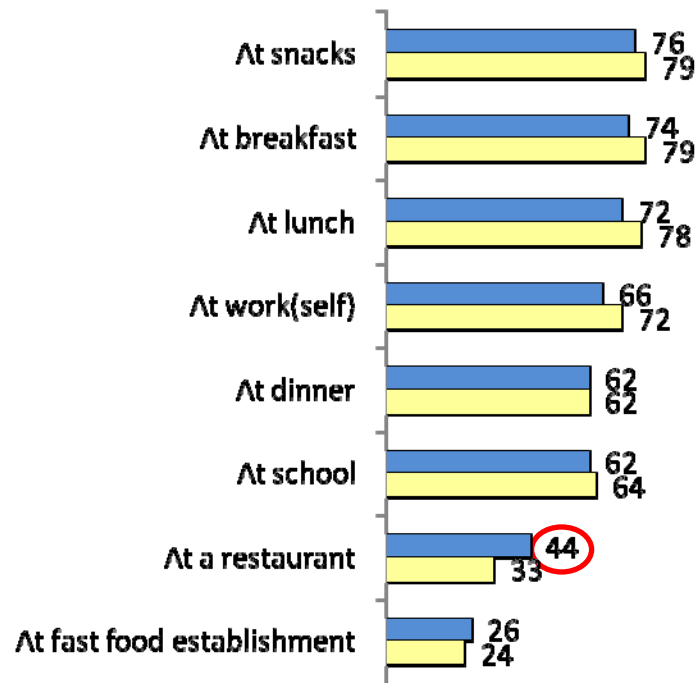
■ Gen X, n=1230
■ Gen Y, n=370

○ Denotes a statistically significant difference between respondent groups

In 2011, Higher Income Moms found it easier than Lower Income Moms to get their families to eat vegetables at dinner

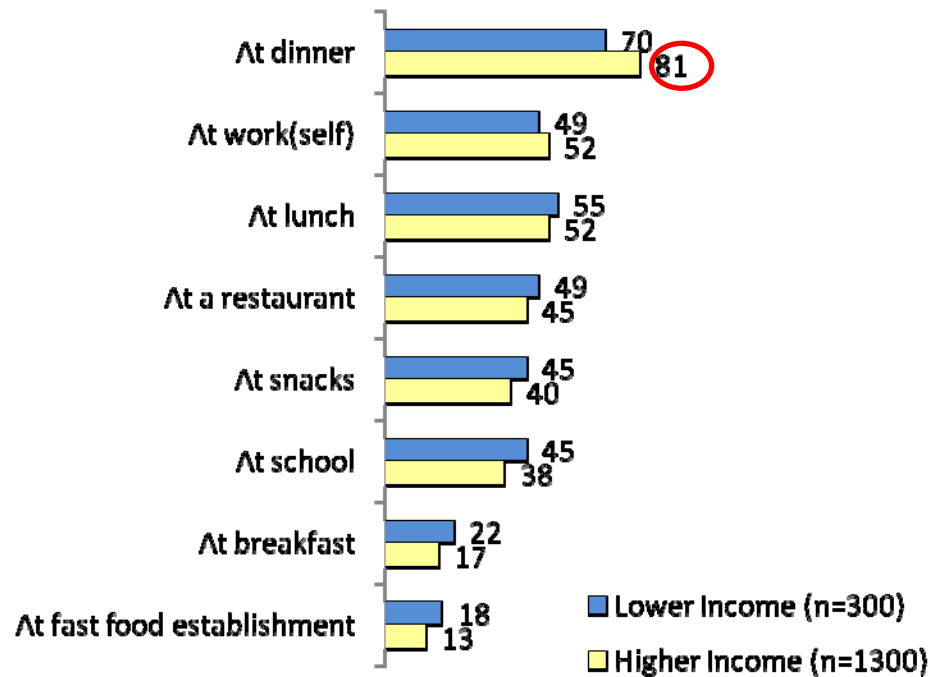
How easy is it for you to get your family to eat fruit and vegetables at different times throughout the day?

FRUIT



% Respondents (Easy)

VEGETABLES

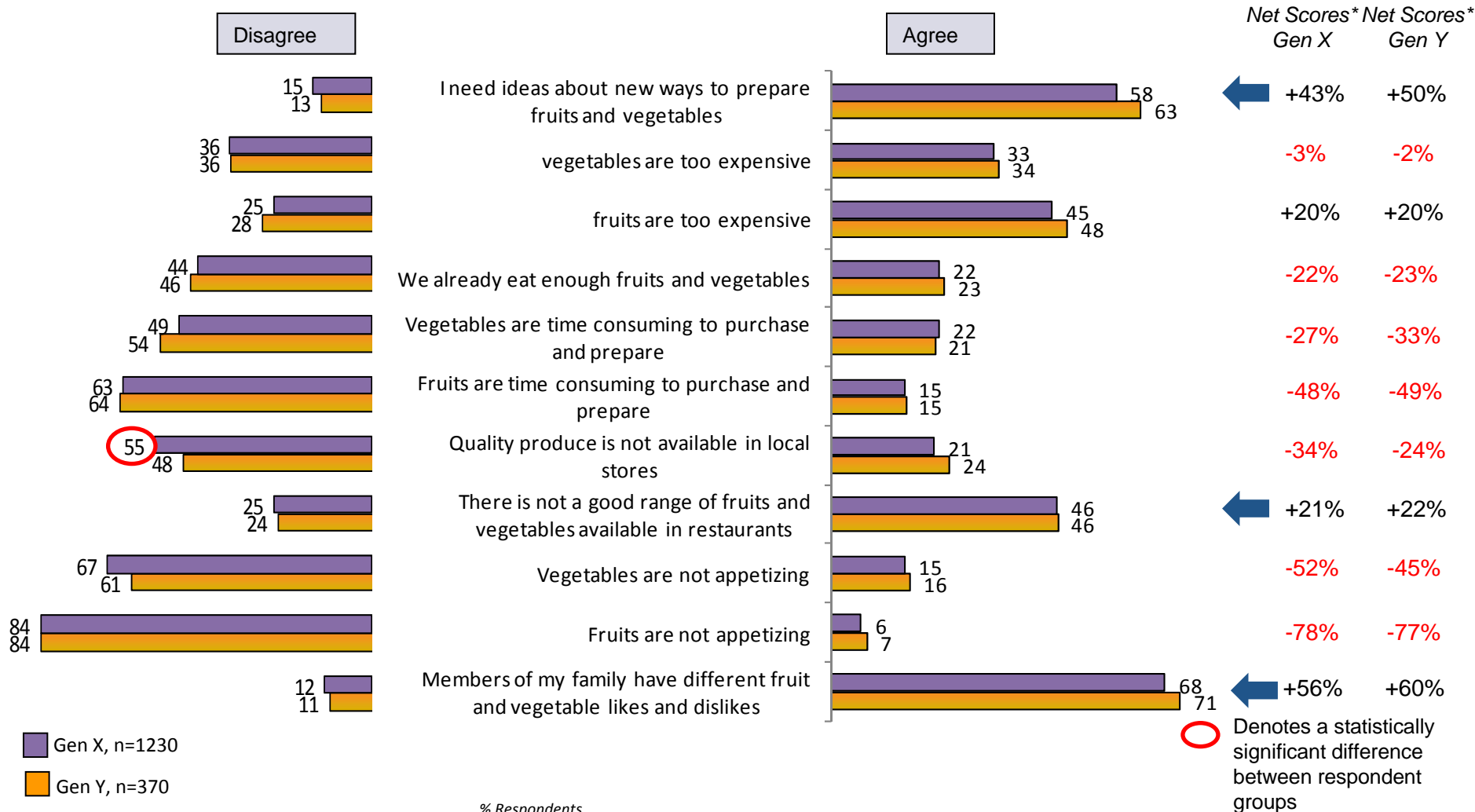


% Respondents (Easy)

Denotes a statistically significant difference between respondent groups

Main barriers are consistent for both Gen X and Gen Y Moms: differing family preferences and the need for preparation ideas

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



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

Q58. 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.

Higher Income Moms are more likely to consider the need for preparation ideas and time to prepare vegetables as main barriers

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



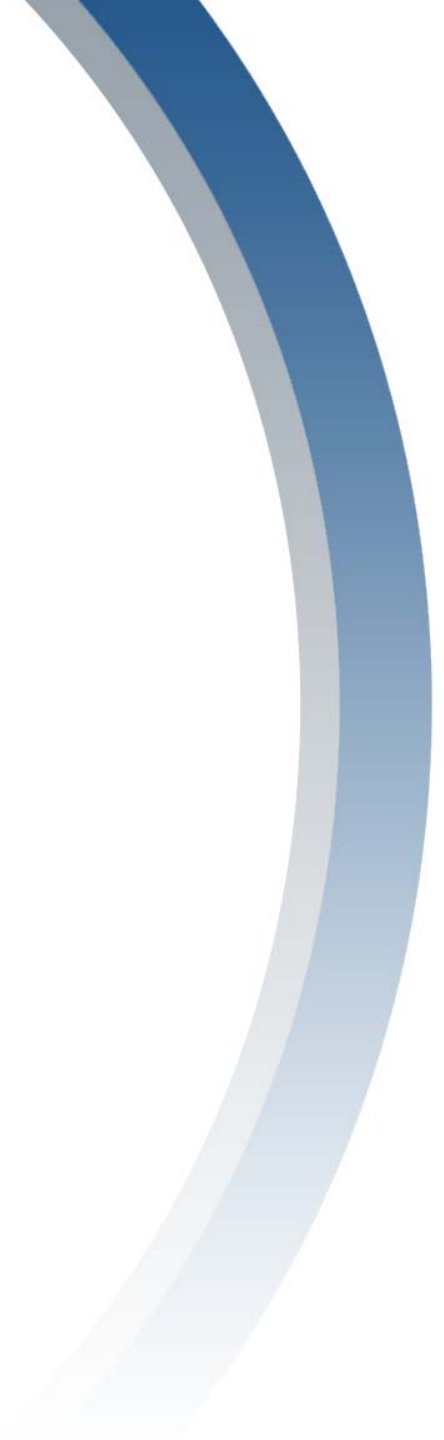
% Respondents

○ Denotes a statistically significant difference between respondent groups

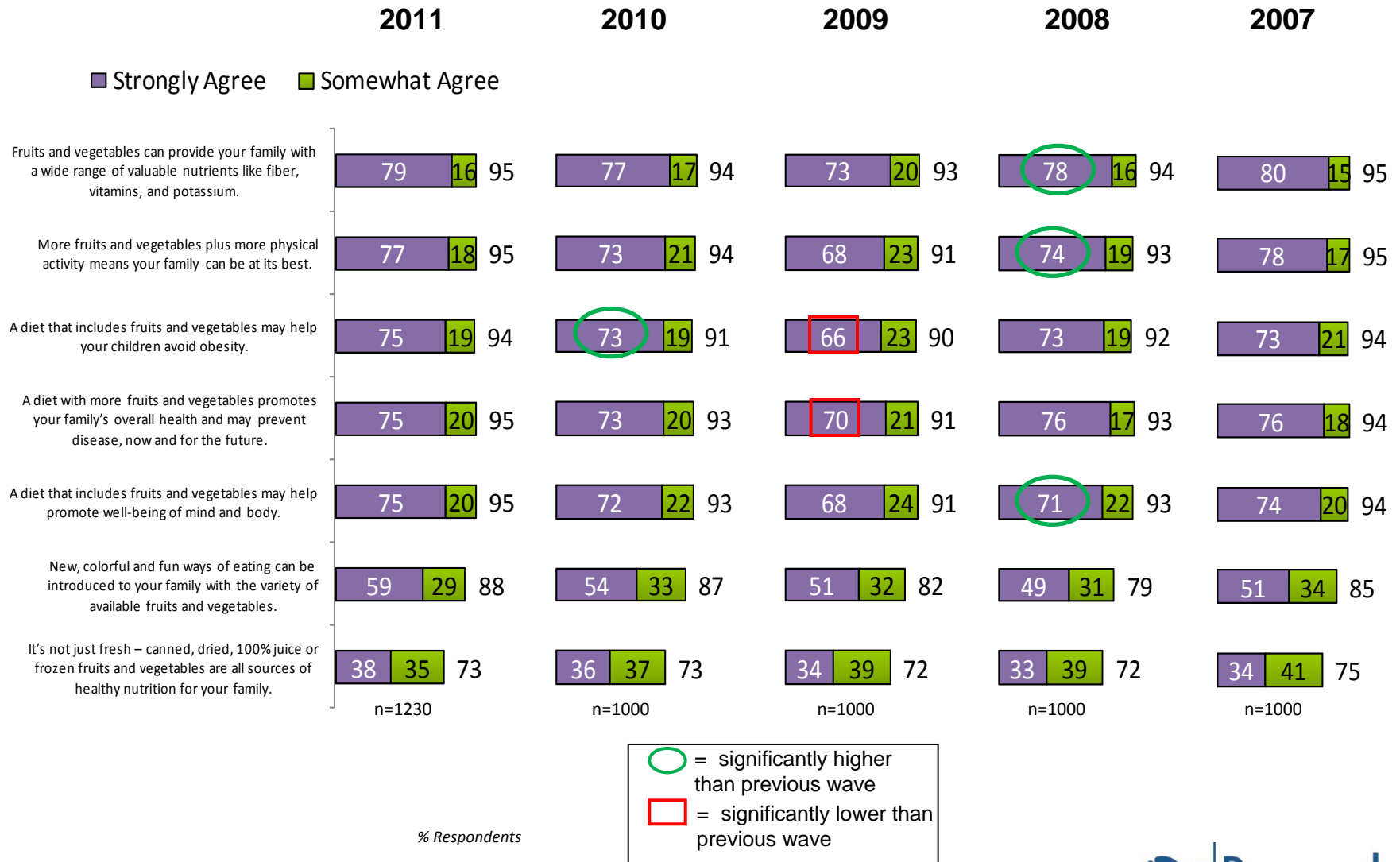
*Net score represents % respondents who agreed with the statement less those who disagreed with any given statement.

Q58. 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.

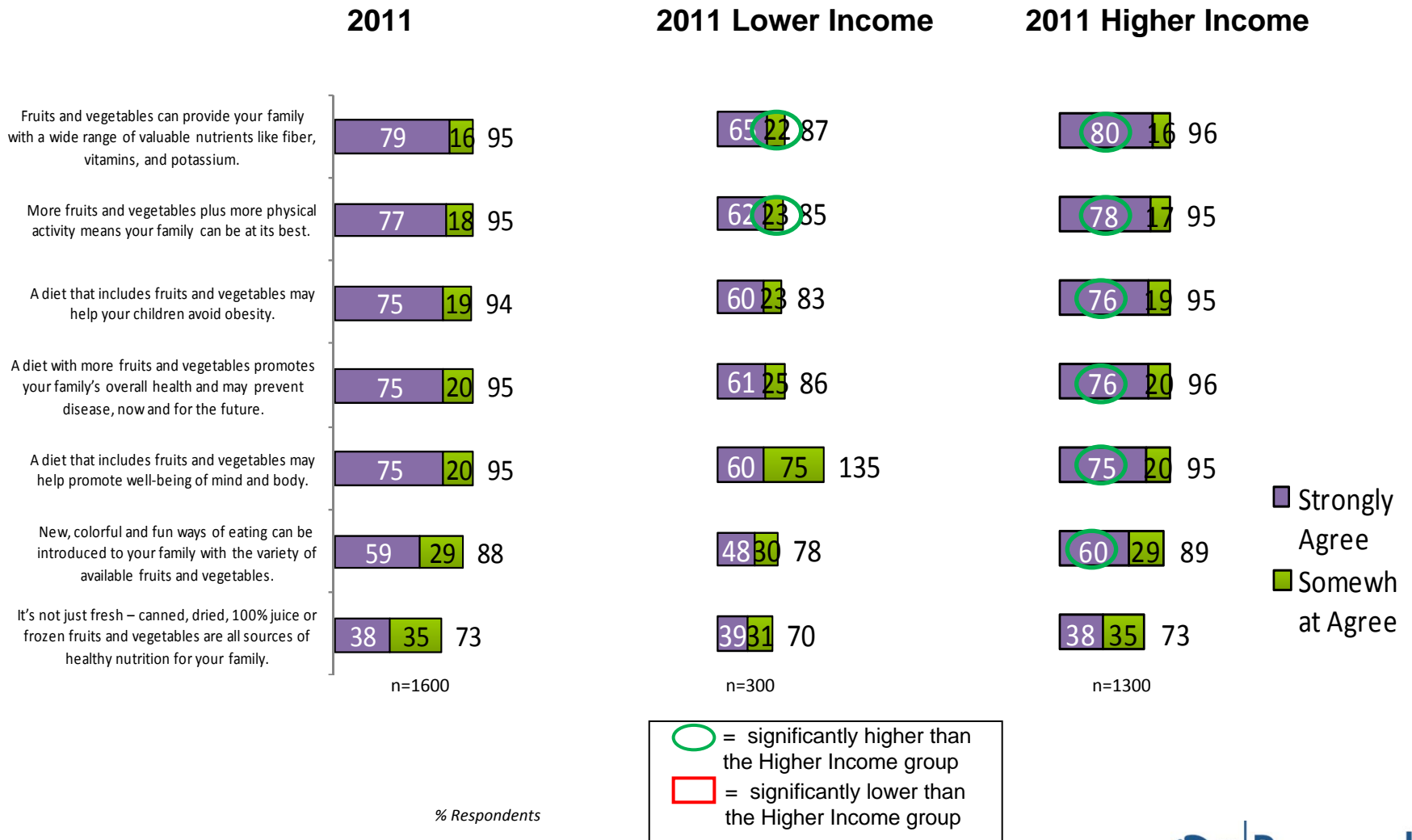
Benefits



No significant change in Gen X Moms' attitudes towards key messages

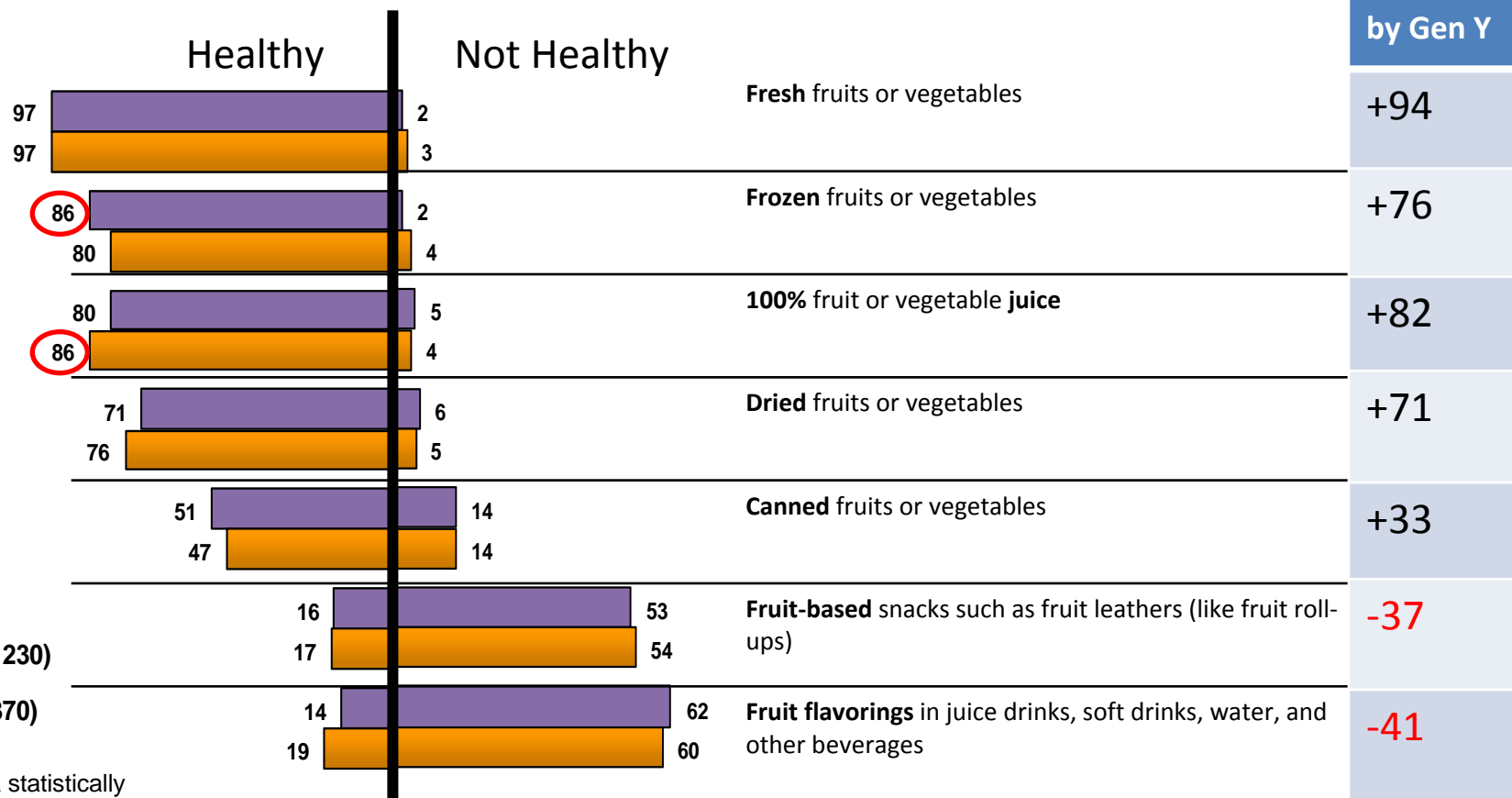


No significant change attitudes towards key messages by Income



In 2011, Gen Y Moms are less likely than Gen X Moms to perceive frozen fruits and vegetables as healthy but more likely to perceive 100% fruit or vegetable juice as healthy

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



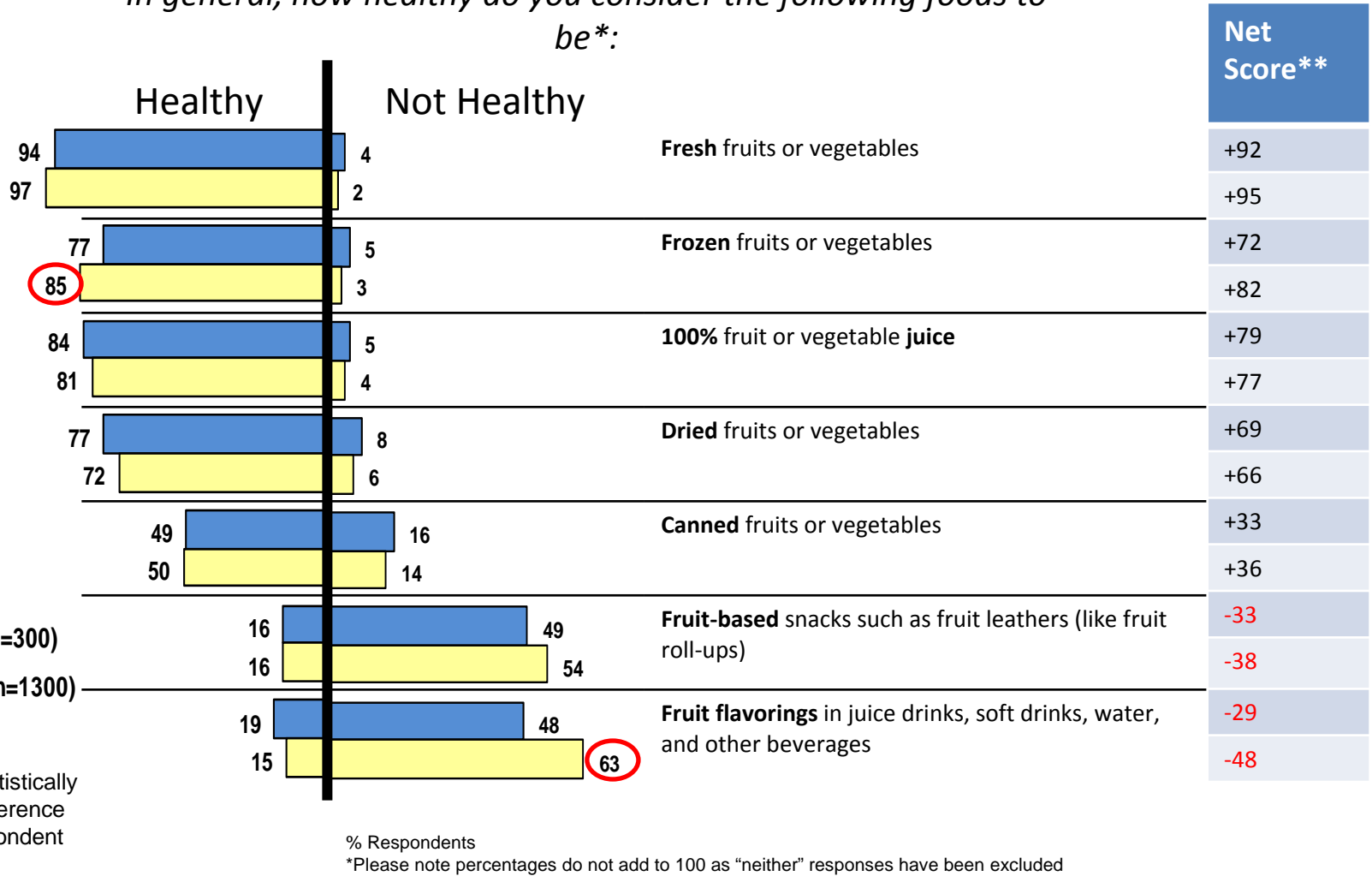
○ Denotes a statistically significant difference between respondent groups

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

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

In 2011, Higher Income Moms were more likely to perceive frozen fruits and vegetables as healthy and more likely to perceive fruit flavorings in beverages as unhealthy

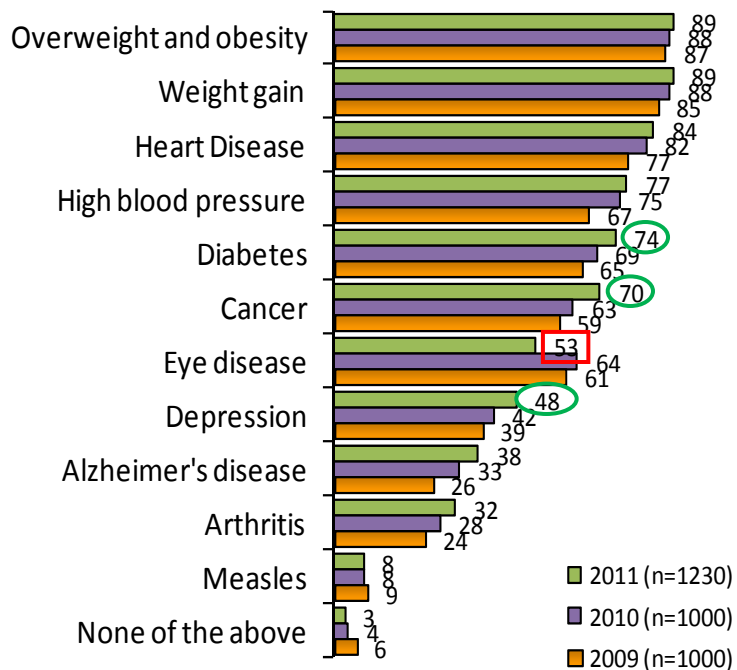
In general, how healthy do you consider the following foods to be*:



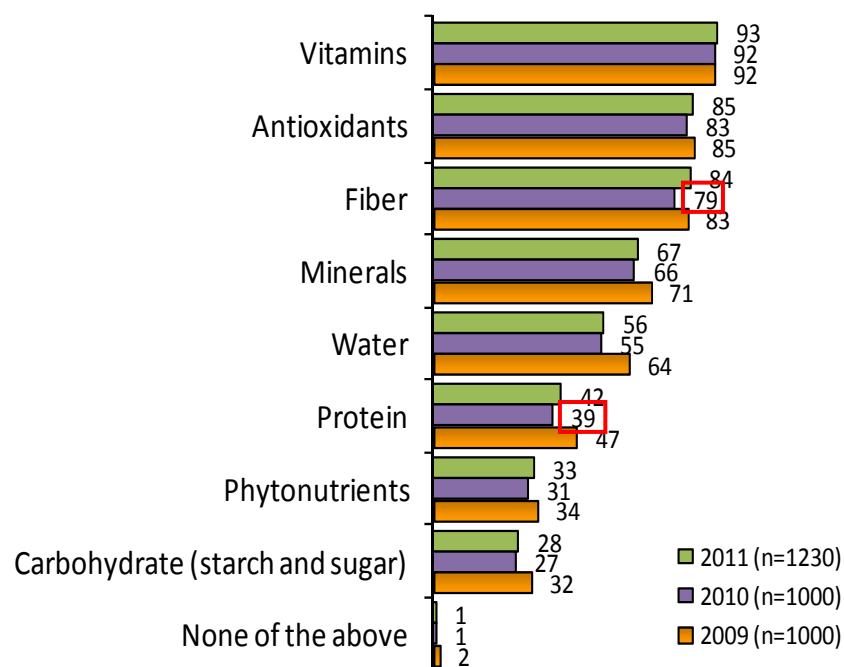
**Net score represents % respondents who agree with the given statement less those who disagree

In 2011, the preventative benefits relating to diabetes, cancer and depression 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?



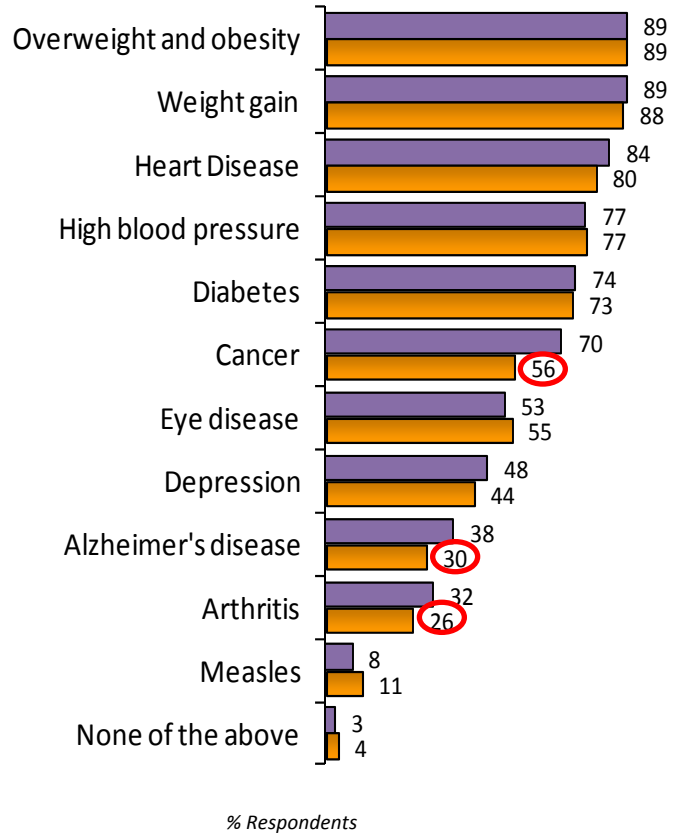
Note: in 2010, "eye disease" was used to replace "eye health" in previous studies.

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

% Respondents

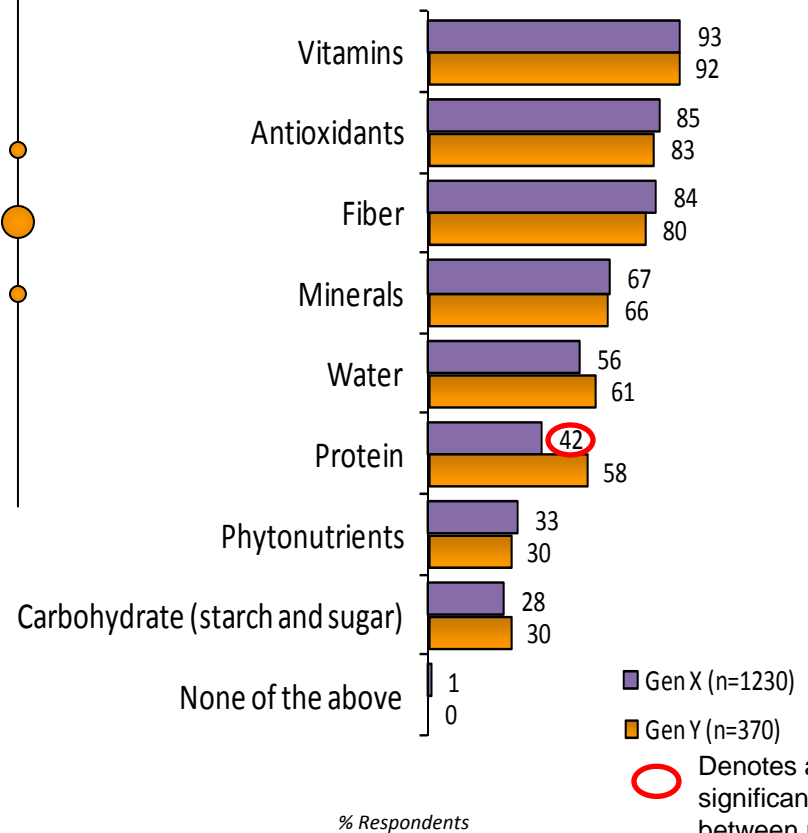
% Respondents

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



Note: in 2010, "eye disease" was included and replaced "eye health" from previous studies.

Which components may provide health benefits?



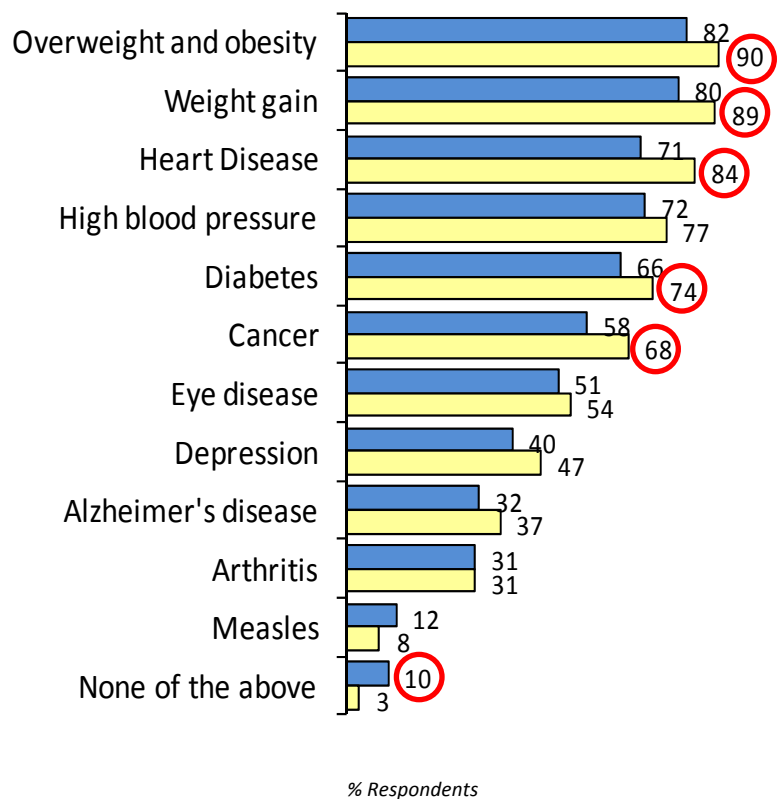
■ Gen X (n=1230)

■ Gen Y (n=370)

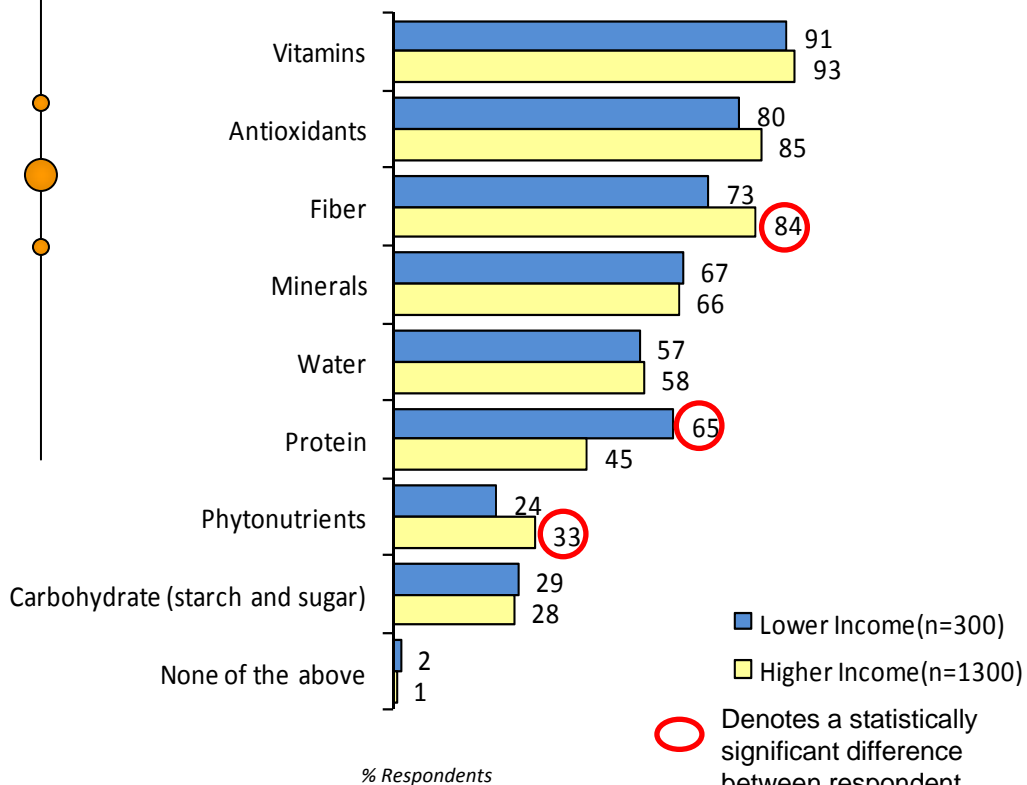
○ Denotes a statistically significant difference between respondent groups

Several fruit and vegetable preventative benefits less likely to be identified by Lower Income Moms

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



Which components may provide health benefits?



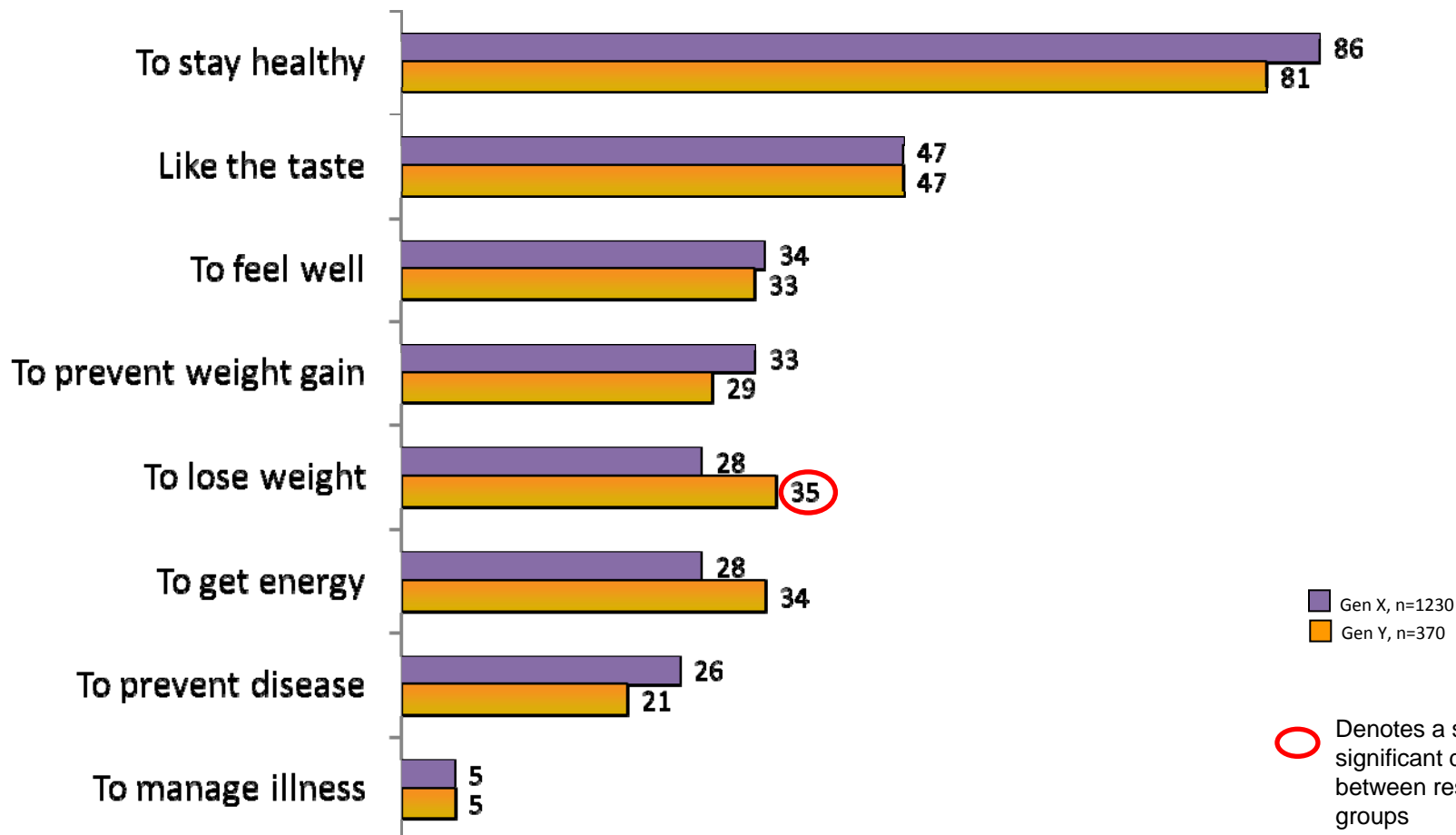
Denotes a statistically significant difference between respondent groups

Q61: Which of the following do you believe consuming fruits and vegetables may be beneficial for preventing? (Please select all that apply)

Q63: Which of the following components of fruits and vegetables do you believe may provide health benefits? (Please select all that apply)

In 2011, 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 lose weight”

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

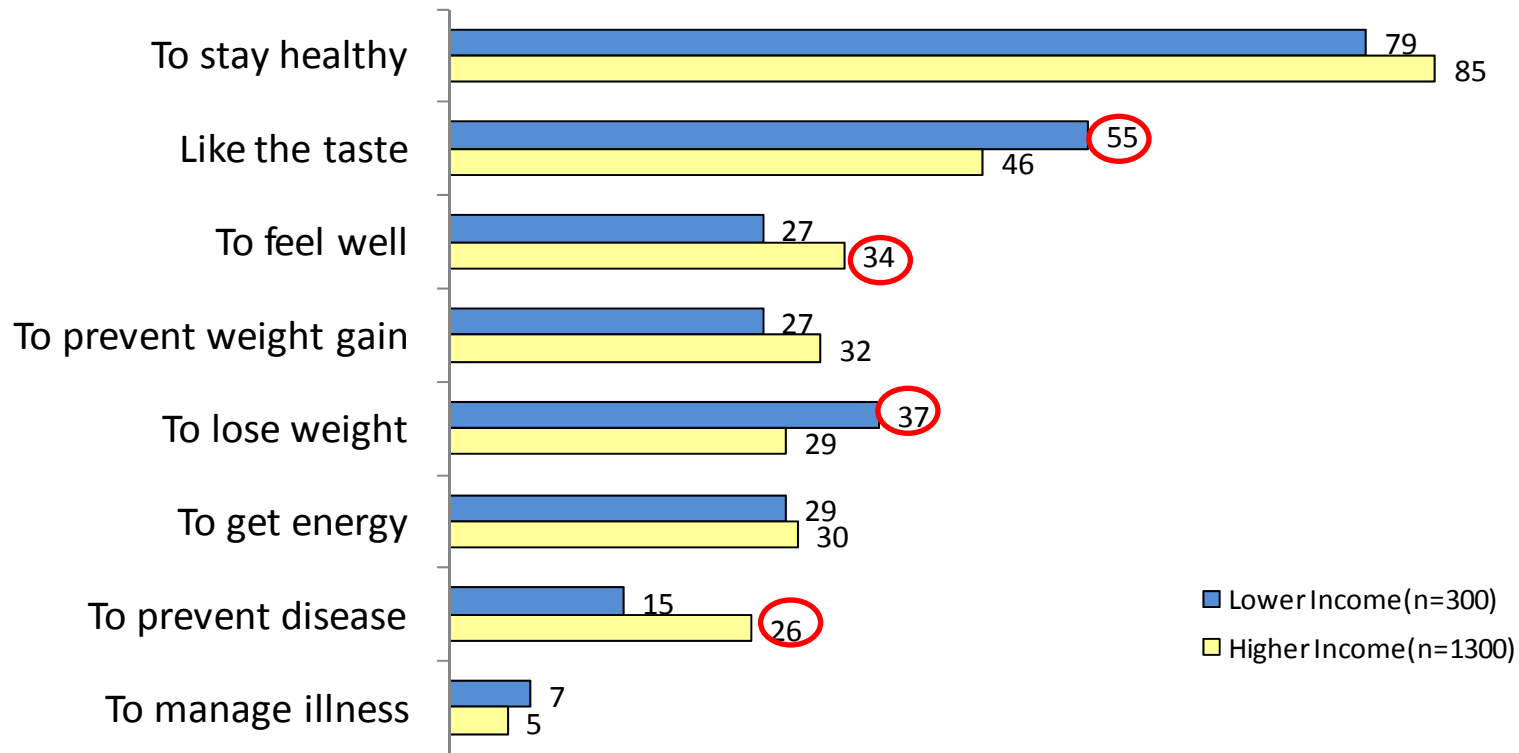


% Respondents

Q62. Please select up to three of the most important reasons why you, yourself, eat fruits and vegetables.

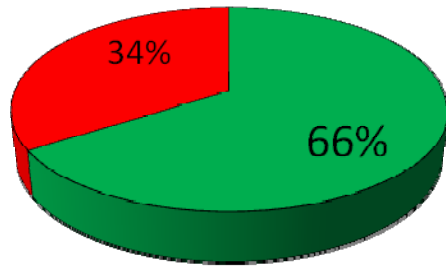
In 2011, Lower Income Moms more likely to identify taste and to lose weight, Higher Income Moms more likely to identify to feel well and to prevent disease

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



○ Denotes a statistically significant difference between respondent groups

Are you actively trying to change your weight?

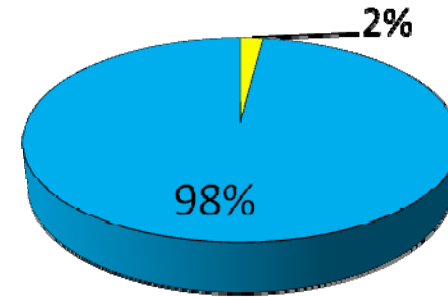


■ YES ■ NO

% Respondents (n=1600)



Are you trying to:



■ Gain Weight ■ Lose Weight

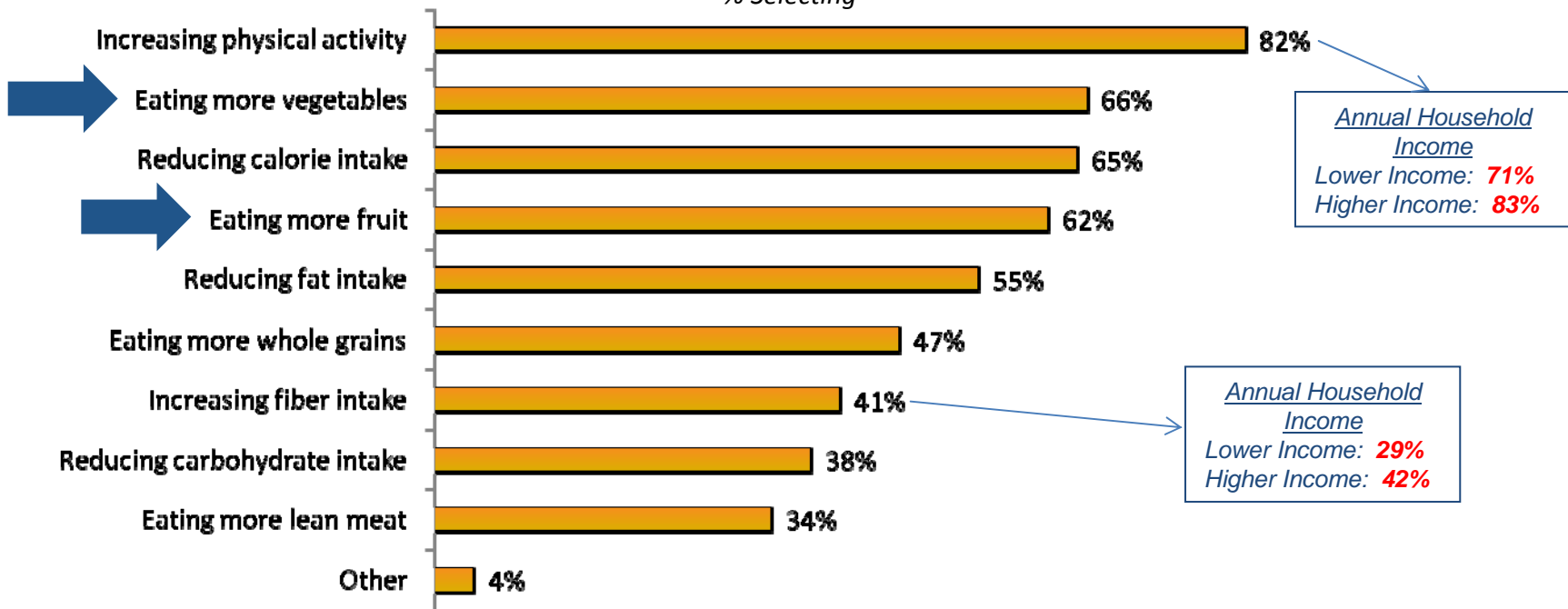
% Respondents (n=1064)

	Body Type									
	A	B	C	D	E	F	G	H	I	
% Trying to lose weight	12%	29%	55%	68%	81%	80%	89%	84%	78%	
% Not trying to change weight	68%	68%	44%	31%	18%	19%	11%	16%	22%	
% Trying to gain weight	20%	3%	1%	1%	1%	1%	-	-	-	

What strategies are you using to lose weight?

(only asked if the participant is trying to lose weight)

% Selecting



Body Type (n=1038)									
Strategies to lose weight	A	B	C	D	E	F	G	H	I
% Selecting Eating more vegetables	33%	51%	62%	64%	67%	73%	77%	73%	64%
% Selecting Eating more fruit	0%	51%	55%	63%	60%	68%	73%	77%	64%

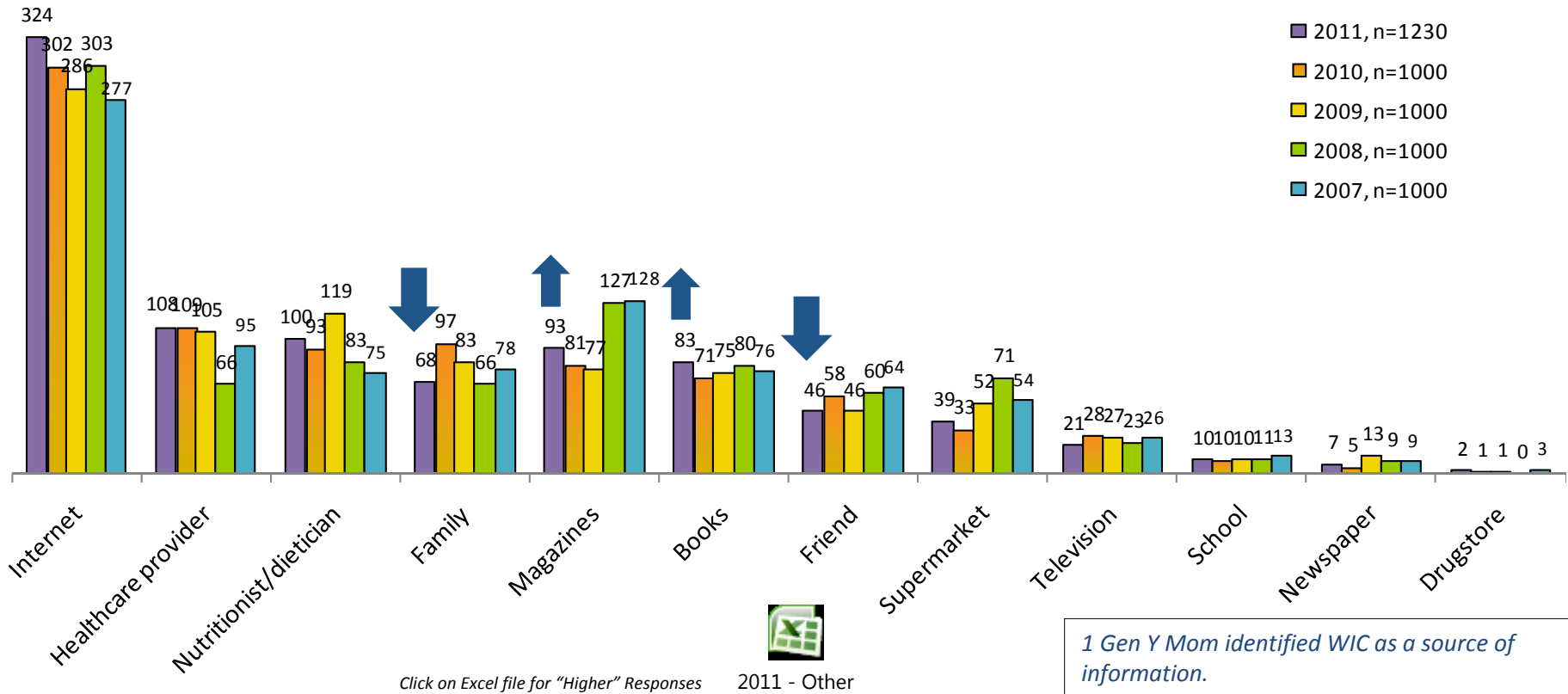
% Respondents (n=1070)

Communications



Gen X Moms, by far, most likely to consult the Internet; less likely this year to consult family and friends, more likely to consult print

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)*

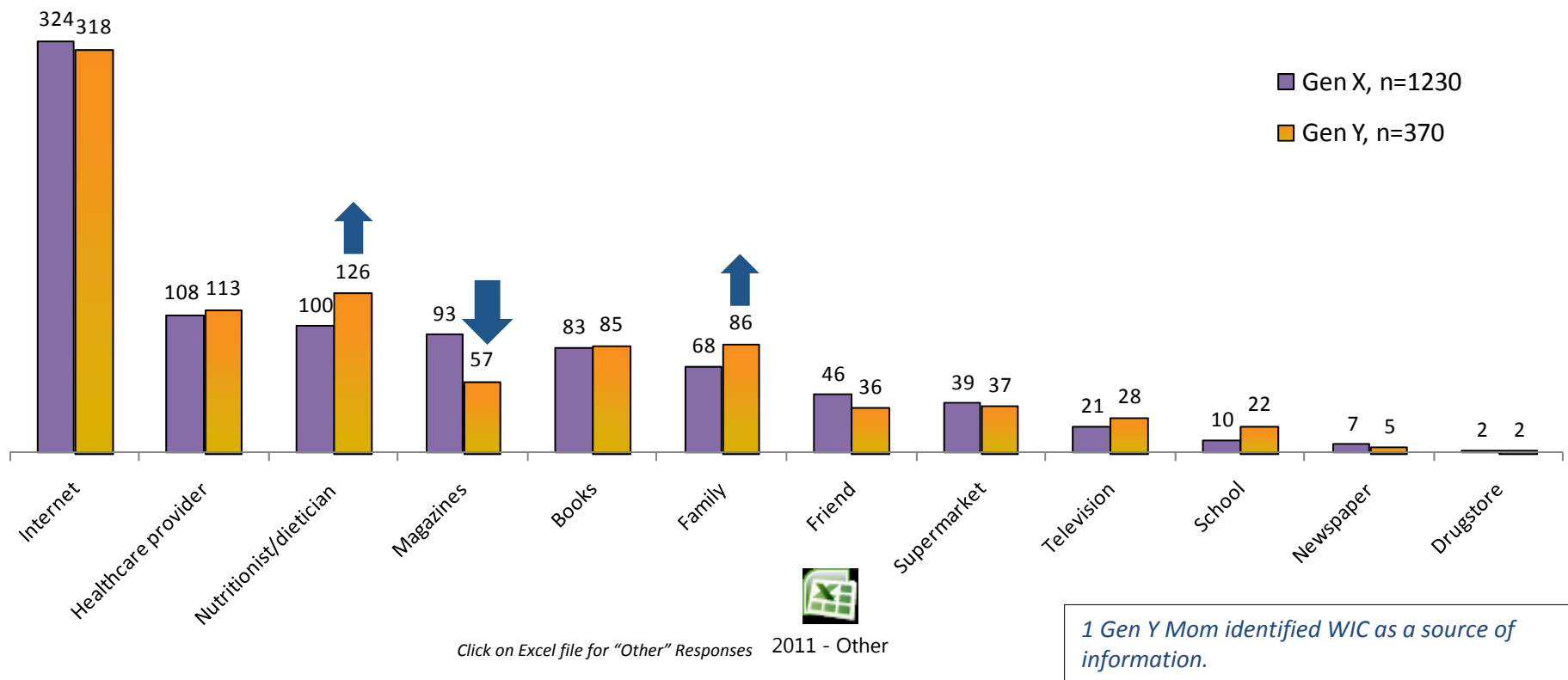


1 Gen Y Mom identified WIC as a source of information.

Click on Excel file for "Higher" Responses 2011 - Other

*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.

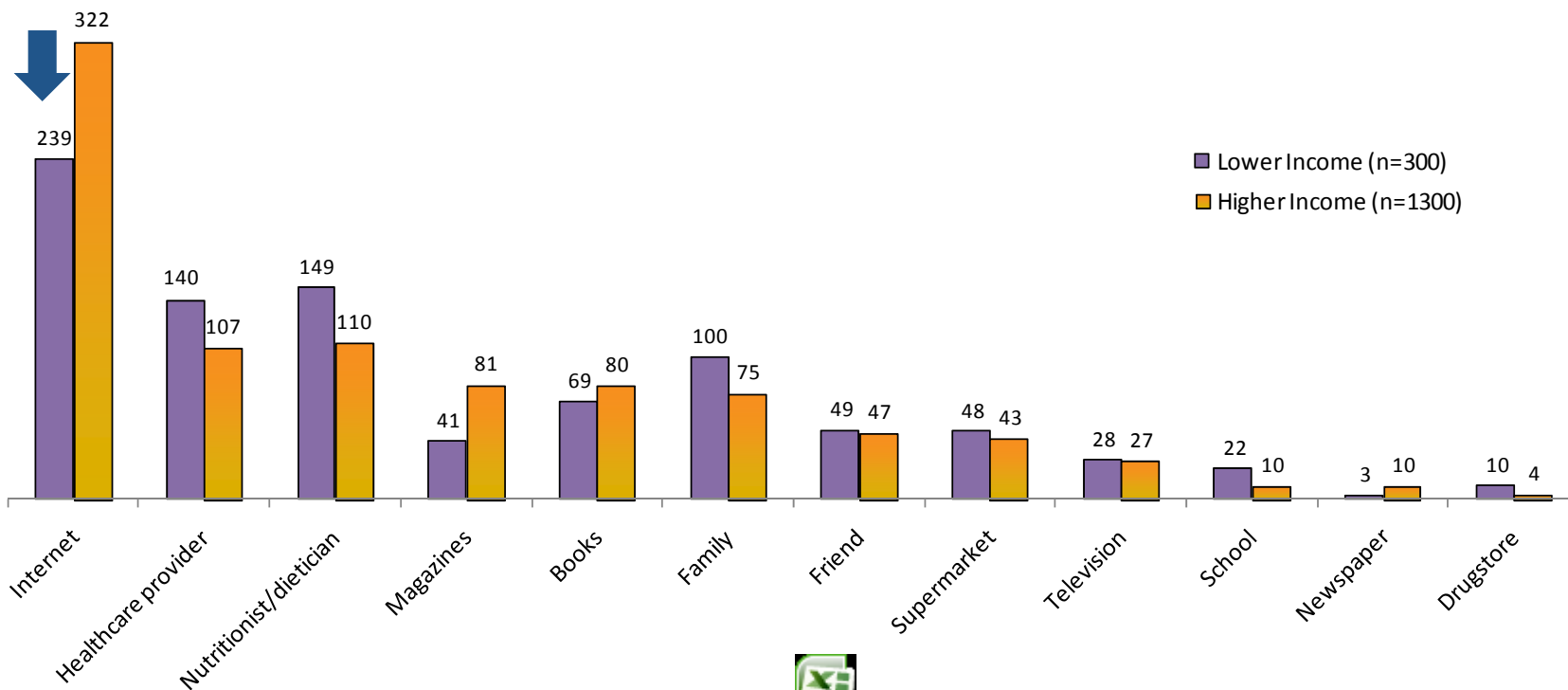
If you wanted information about how to get your family to eat more fruits and vegetables, where would you go to obtain it?



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.

The Internet is also the preferred source regardless of income though it is less likely to be consulted by Lower Income Moms

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



Click on Excel file for "Higher" Responses 2011 - Other

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.

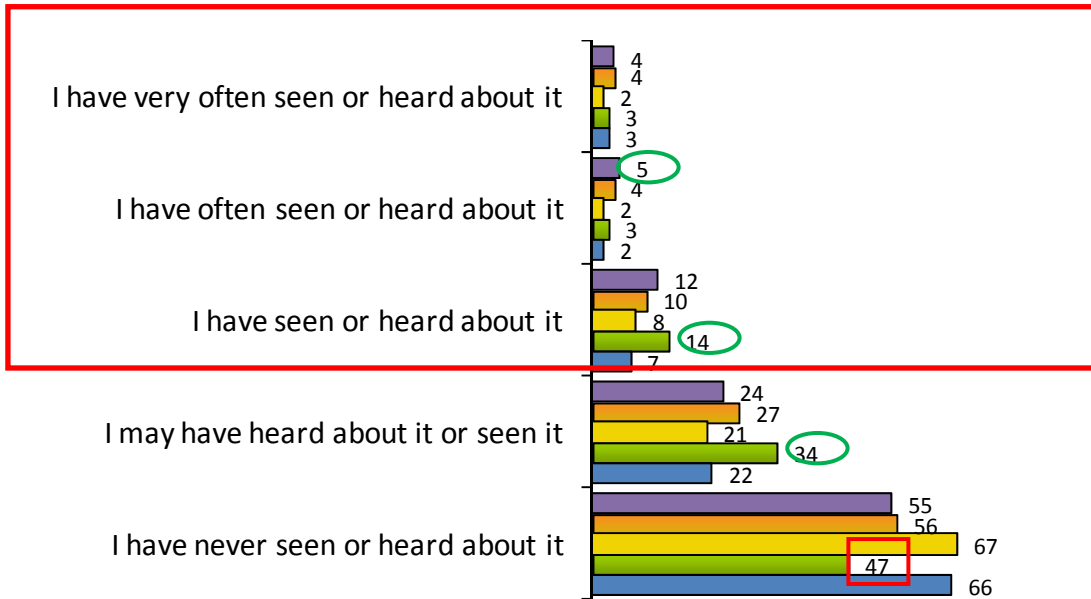


Campaign Awareness & Impressions

Awareness of the logo amongst Gen X moms is slightly higher ...



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



Total "definite" awareness:
 21% (2011) +3%
 18% (2010) +6%
 12% (2009) -8%
 20% (2008) +8%

2011 (n = 1230)
 2010 (n = 1000)
 2009 (n = 1000)
 2008 (n = 1000)
 2007 (n = 1000)

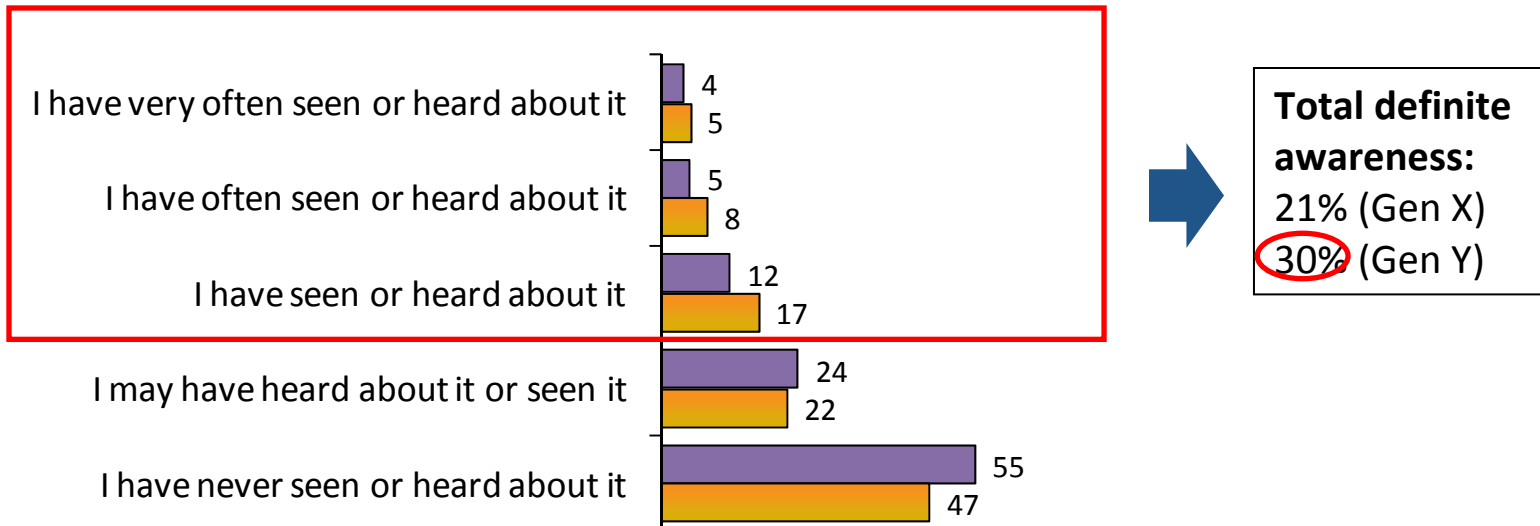
○ = significantly higher than previous wave
 □ = significantly lower than previous wave

% Respondents

... and Gen Y Moms are more likely to be aware of the logo than Gen X Moms



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



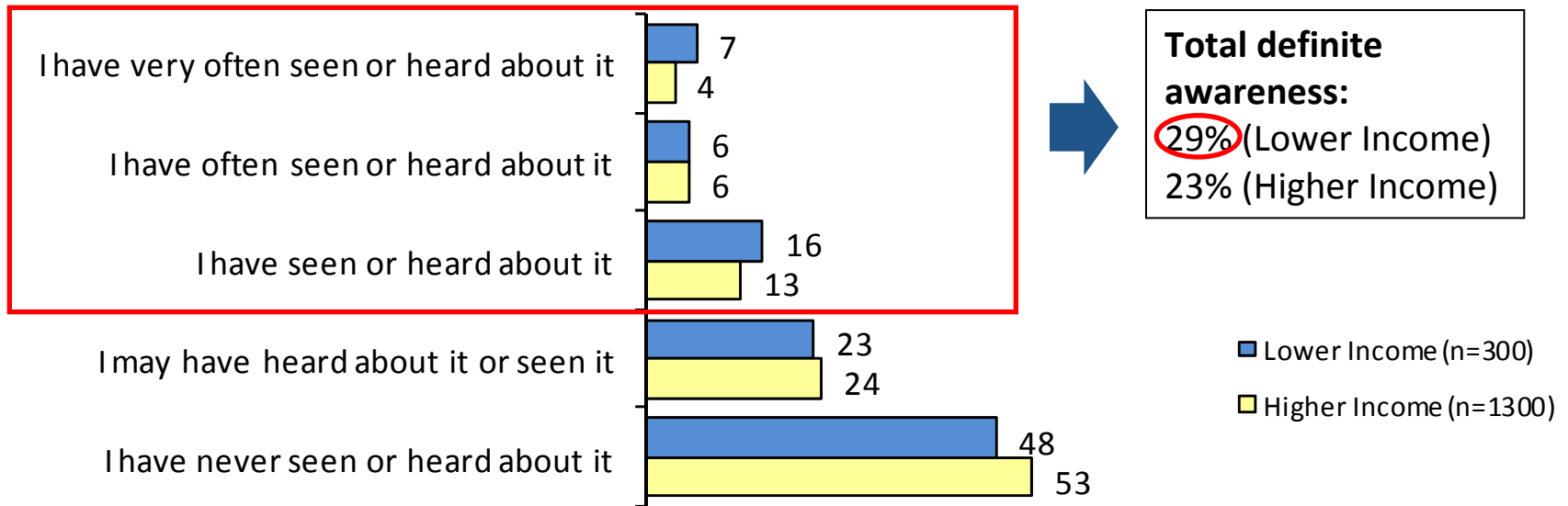
% Respondents

Lower Income Moms were slightly more likely to be aware of the logo than Higher Income Moms

78



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



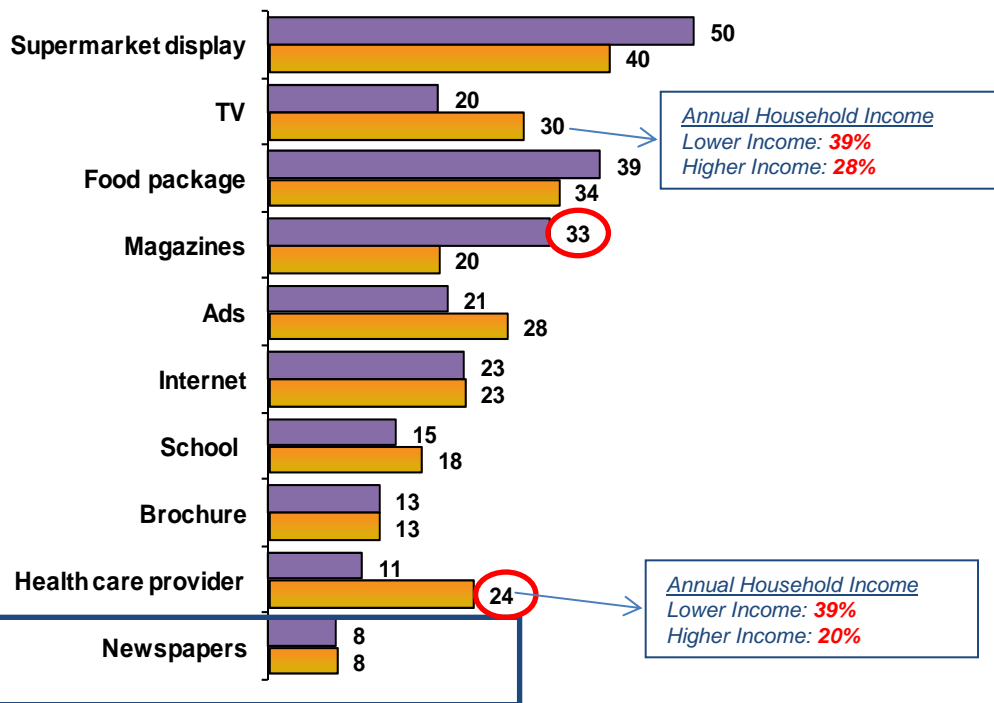
% Respondents

In 2011, Gen Y Moms were much more likely than Gen X Moms to report seeing the logo at a Healthcare Provider or Government office and much less likely to have seen it in a magazine – Lower Income Gen Y Moms more likely to identify TV and healthcare providers



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

Primary Channels



	Secondary Channels	
	Gen X	Gen Y
Government	5	15
Billboard	5	5
Newspapers	5	5
Word of mouth	3	8
Books	3	5
University	2	2
Church	2	2
Radio	2	1
Higher	5	4

○ Denotes a statistically significant difference between respondent groups

% Respondents

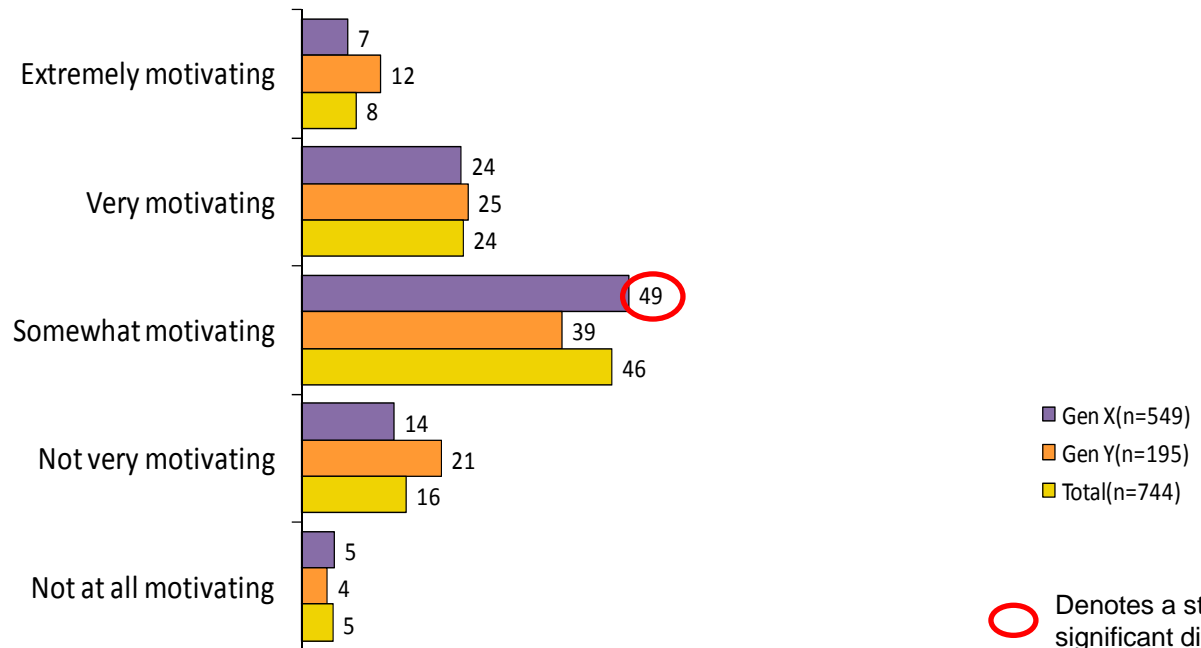
■ Gen X (n = 549)
■ Gen Y (n = 195)

In 2011, Gen Y Moms were equally likely to be motivated by the logo as Gen X Moms



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

2011: Gen X vs. Gen Y Moms (Only asked to those who were familiar with the logo)



Denotes a statistically significant difference between respondent groups

% Respondents

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



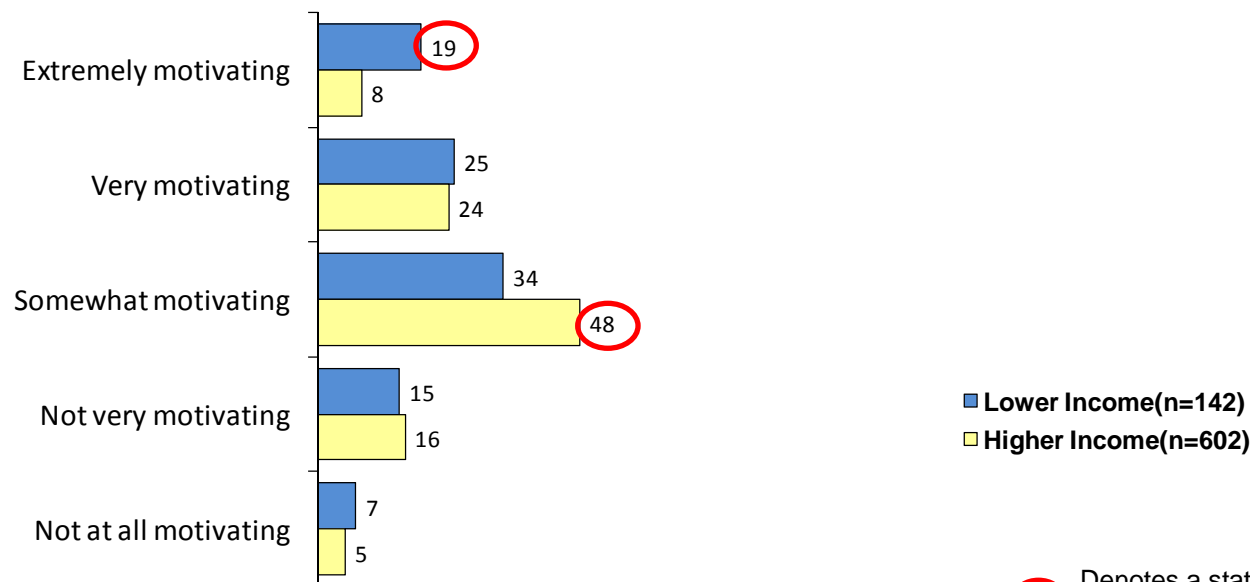
Q67. How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?

In 2011, Lower Income Moms were more likely to be motivated by the logo than Higher Income Moms



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

2011: Lower Income Moms vs. Higher Income Moms (Only asked to those who were familiar with the logo)



○ Denotes a statistically significant difference between respondent groups

% Respondents

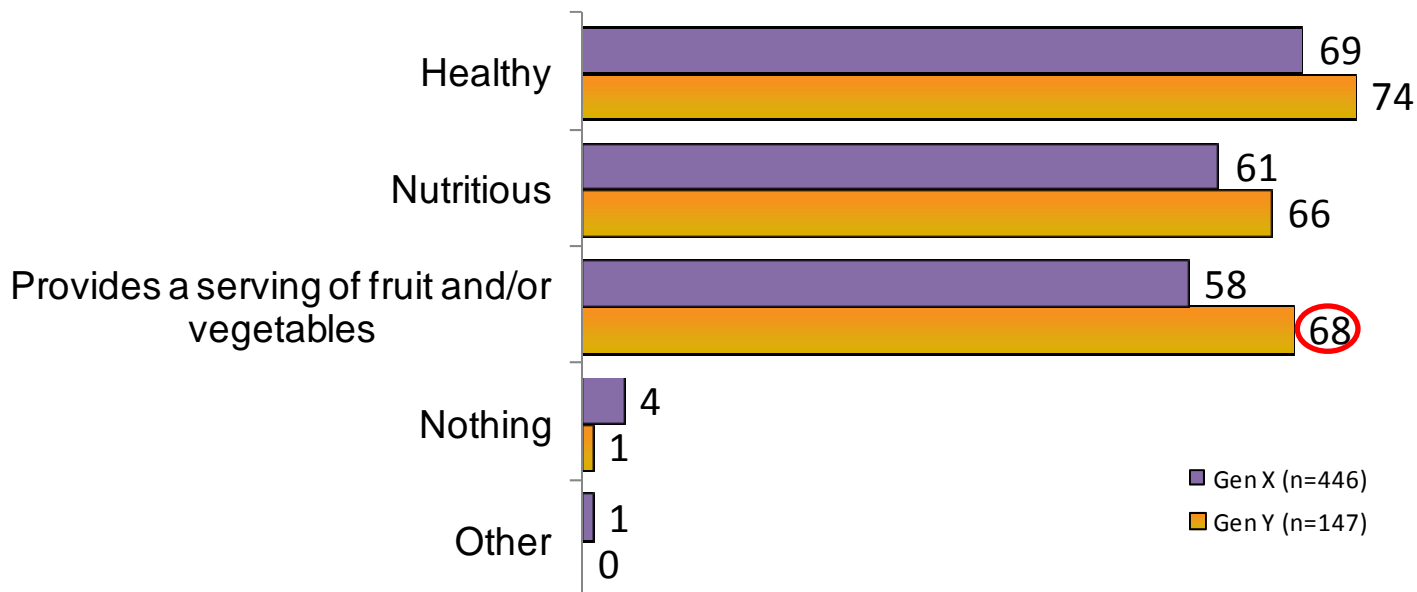
*Top 2 box score reflects the total score of respondents who answered 1 or 2

In 2011, Gen Y Moms were more likely to associate the logo with “provides a serving of fruit and/or vegetables” than Gen X Moms



Logo Brand Association

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



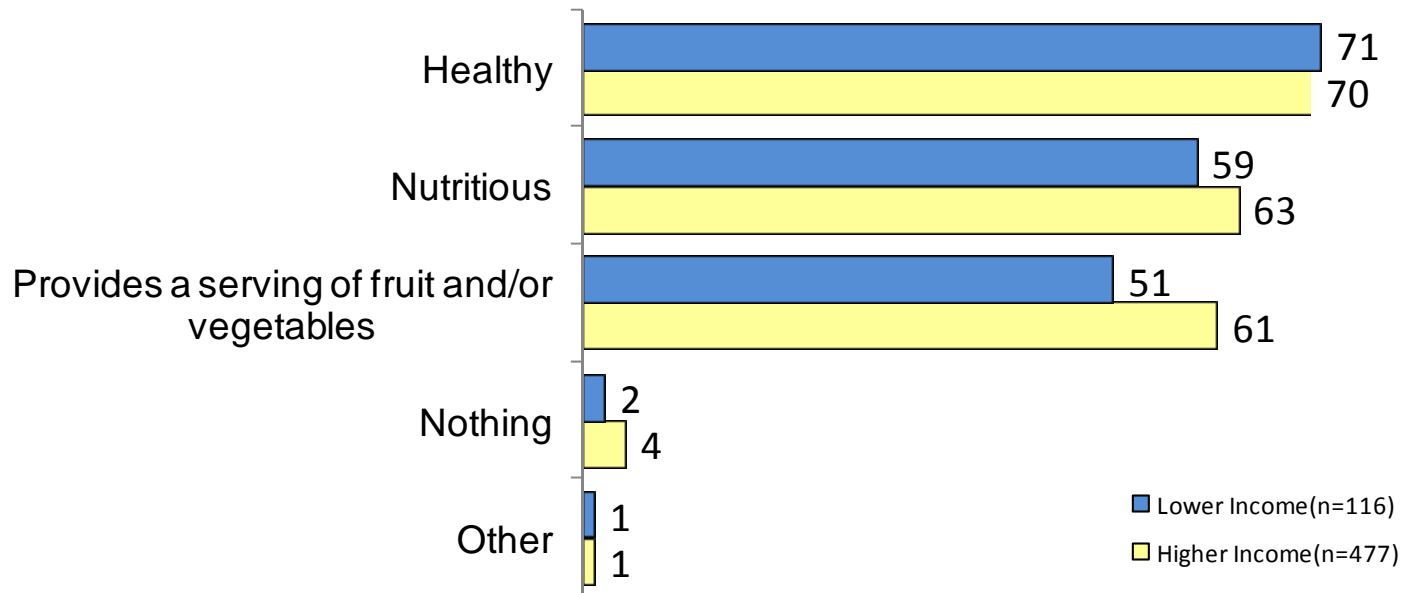
○ Denotes a statistically significant difference between respondent groups

No significant differences by Income



Logo Brand Association

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



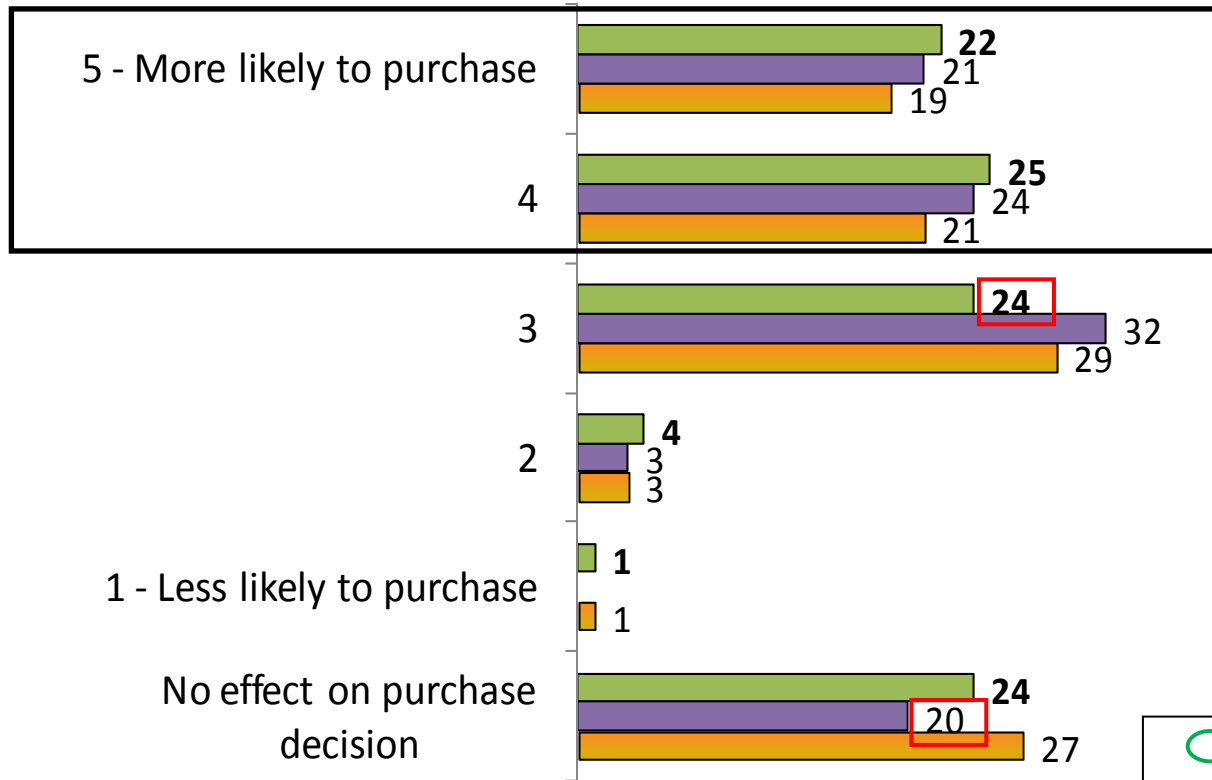
○ Denotes a statistically significant difference between respondent groups

In 2011, the logo had a slightly more positive influence on the purchase decision amongst Gen X Moms ...



Logo Purchase Influence

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



Top 2 box score*:
 2011: 47%
 2010: 45% +2%
 2009: 40% +5%

■ 2011, n=566
 ■ 2010, n=458
 ■ 2009, n=234

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

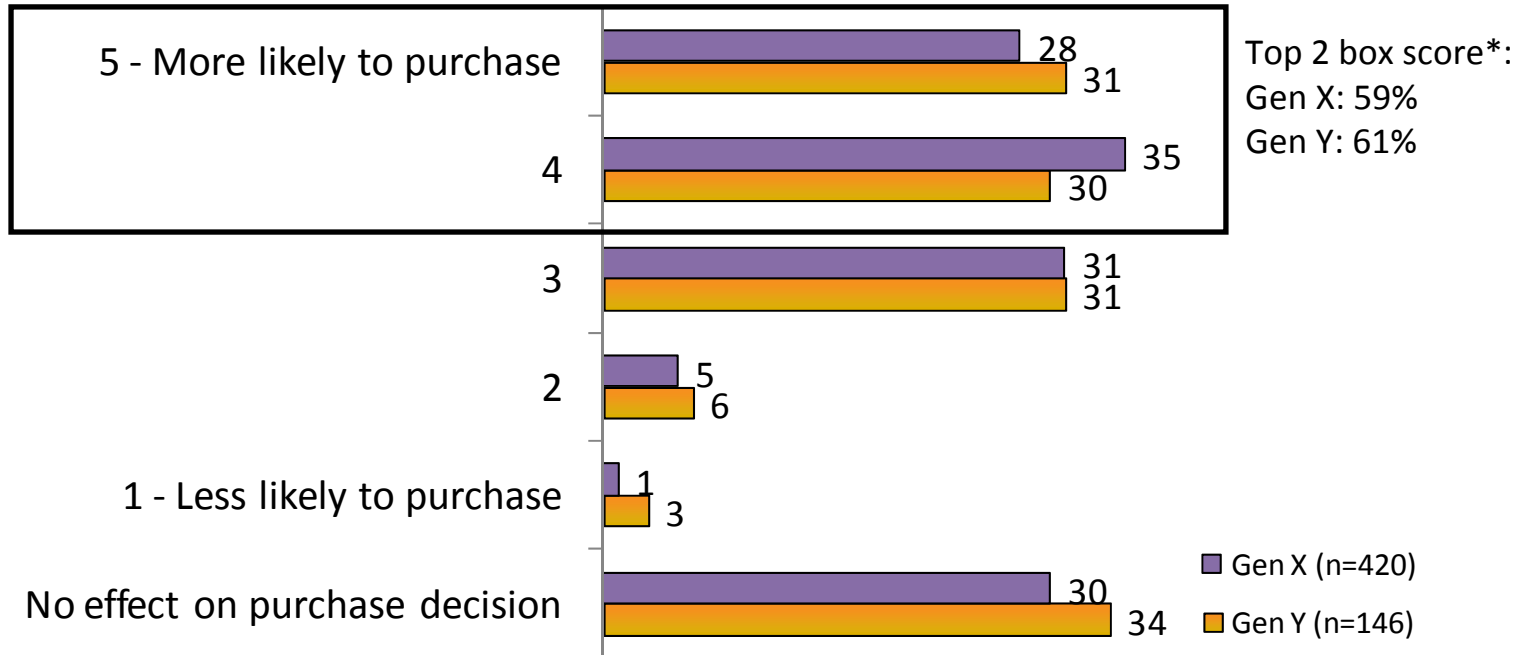
% Respondents

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

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



Logo Purchase Influence
2011: Gen X vs. Gen Y Moms (Only asked to those who were familiar with the logo)



○ Denotes a statistically significant difference between respondent groups

% Respondents

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

Q70 . How does seeing the "Fruits & Veggies - More Matters" logo affect your decision to purchase the product?

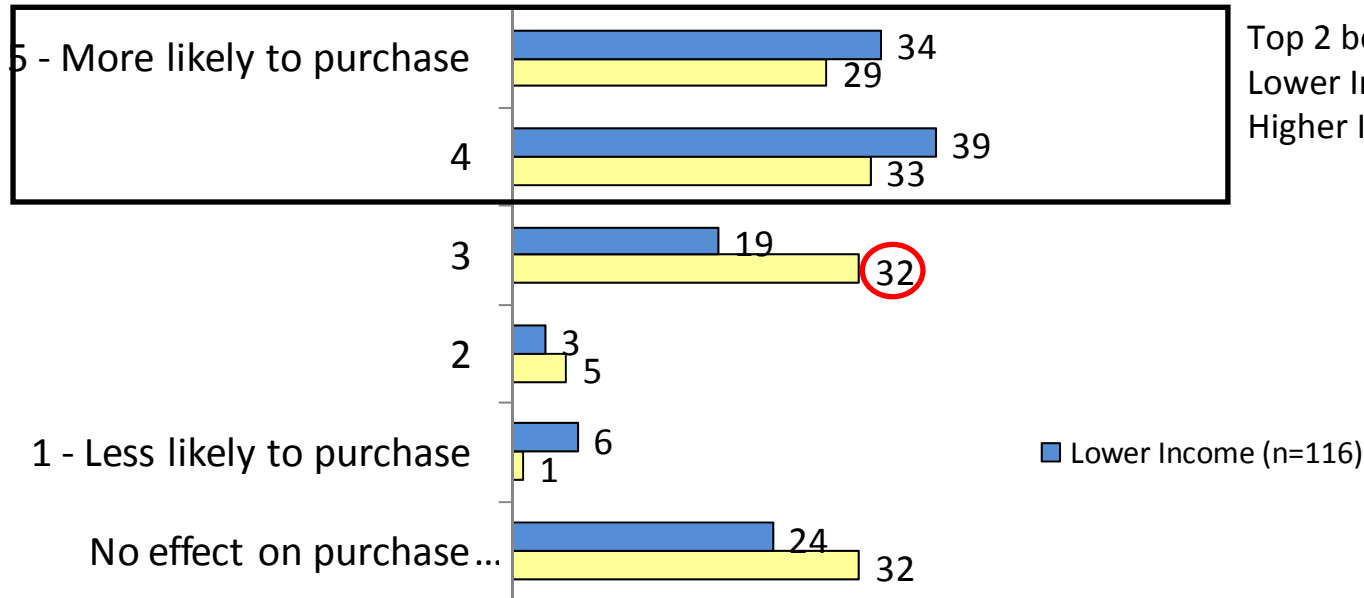
... and was slightly more likely to influence Lower Income Mom's purchase decision



Logo Purchase Influence

2011: Lower Income vs. Higher Income Moms

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




Top 2 box score*:
 Lower Income: 71%
 Higher Income: 62%

Denotes a statistically significant difference between respondent groups

% Respondents

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

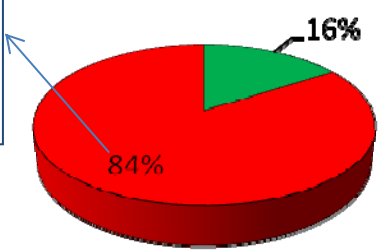


**Supplemental Nutrition
Assistance Program and the
WIC program**

Since having children, have you used the **Supplemental Nutrition Assistance Program** (previously called food stamps)?

Have you ever used the **Women, Infants, and Children (WIC)** program for yourself or your child?

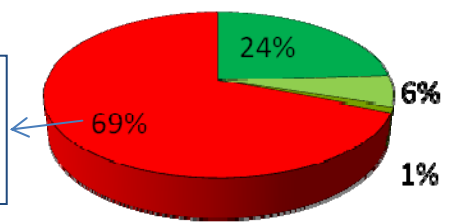
Annual Household Income
Lower Income: 30%
Higher Income: 80%



■ YES ■ NO

% Respondents (n=1600)

Annual Household Income
Lower Income: 14%
Higher Income: 73%

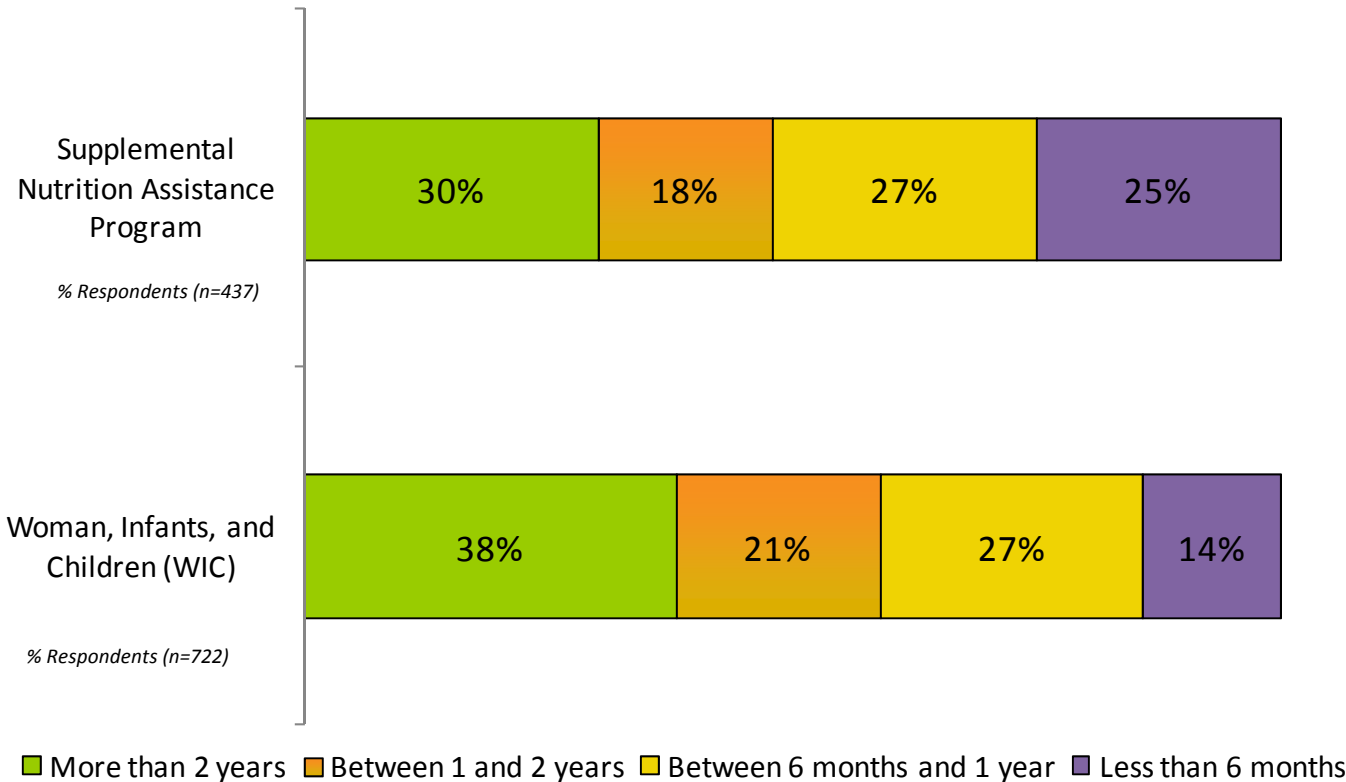


■ Yes, for both ■ Yes, for my child
■ Yes, for myself ■ No

% Respondents (n=1600)

14% of participants have tried both SNAP and WIC.

*How long did you or your child participate in the Supplemental Nutrition Assistance Program/ Women, Infants, and Children (WIC) program?
(only asked if the respondent or respondent's child has participated in the program)*

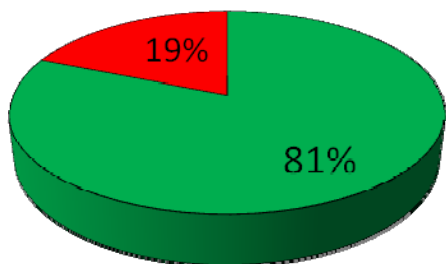


SNAP		
	Lower Income	Higher Income
Less than 1 year	25%	64%
1 year or more	75%	35%

WIC		
	Lower Income	Higher Income
Less than 1 year	28%	44%
1 year or more	72%	56%

Do you believe the **Supplemental Nutrition Assistance Program** helped you and your child to eat more fruits and vegetables?

(only asked if the respondent has participated in this program)

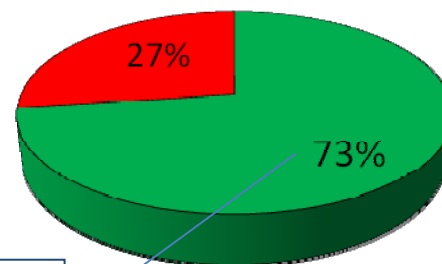


■ YES ■ NO

% Respondents (n=437)

Do you believe the **Women, Infants, and Children (WIC)** program helped you or your child to eat more fruits and vegetables?

(only asked if the respondent or respondent's child has participated in this program)



■ YES ■ NO

% Respondents (n=722)

Annual Household Income
 Lower Income: **81%**
 Higher Income: **71%**



Summary of Key Findings and Recommendations

Key Findings and Recommendations (slide 1 of 3)

98

- The impact of the campaign (logo and website) remained consistent with the prior year.
 - Familiarity with the logo, however, increased slightly and the logo was slightly more likely to positively influence the purchase decision
- Overall, Moms continue to be highly motivated to increase their own and their family's consumption. They also reported a higher consumption of fruit and a stable consumption of vegetables compared to last year. In 2011, Gen Y Moms reported a higher consumption of both fruit and vegetables compared to Gen X Moms. Lower Income Moms report eating less and are more likely to struggle with increasing their intake and that of their families. Specific targeting of the fruits and vegetables message to Lower Income Moms should be considered.
- In 2011, Gen X Moms were also more likely to report that their husbands/partners also believed in the importance of fruit and vegetables in their children's meals, suggesting Moms may be able to rely on increased support at home.
- 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.

Key Findings and Recommendations (slide 2 of 3)

99

- Gen X Moms were more likely in 2011 to perceive additional preventative benefits from eating fruit and vegetables: diabetes, cancer and depression. Lower Income Moms less likely to perceive these benefits.
- Concern about food safety and pesticide residues was not a major reason why Moms bought fewer select fruits and vegetables in the past 3 months compared to the prior year. “My family doesn’t like them” and perceived greater cost were the key drivers.
- Gen X Moms were more likely than their Gen Y counterparts to cite “to lose weight” as a top reason for personally eating fruit and vegetables. Given that 59% of Moms are either overweight or obese and that two in three are trying to lose weight, the potential weight-loss benefits of eating fruit and vegetables should be emphasized.
- 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.

Key Findings and Recommendations (slide 3 of 3)

100

- 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.
- Less than one in five (16%) of Moms have used the Supplemental Nutrition Assistance Program while 31% have used the WIC program. Lower Income Moms more likely to have used both and to have been using them for more than 1 year. The majority of users believe that both programs helped them and their children to eat more fruit and vegetables.