

# Produce for Better Health Foundation Gen X Moms Study (Wave 4)

Board of Trustees Meeting, Monterey, CA  
April 2009



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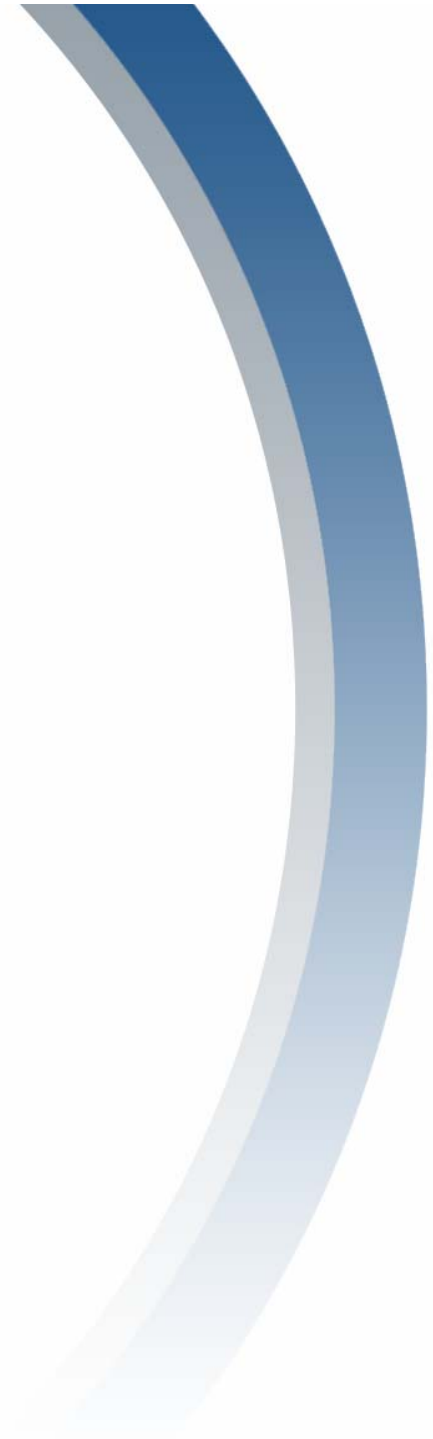
# Objectives & Methodology

## Research Objectives

- Gauge awareness and impressions of the “Fruits & Veggies – More Matters” and “5-9 A Day” (2008 and 2007) logos
- Obtain a sense of Gen X Moms’ relationship with fruits and vegetables (e.g. what she eats) and general attitudes towards them

METHODOLOGY				
Wave	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
<b>Fielding Period</b>	January 16 – 22, 2009	January 18 – 22, 2008	February 2 – 9, 2007	October 3 – 5, 2006
<b>Sample Size</b>	n = 1000	n = 1000	n = 1000	n = 550
<b>Confidence Level</b>	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)	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
<b>Gender</b>	Women only	Women only	Women only	Women only
<b>Age</b>	“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

# Key Trends



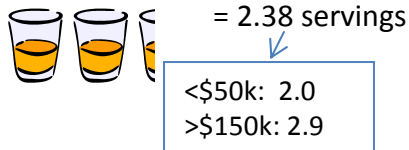
# Daily consumption of fruits and vegetables declined as lower income households cut back on purchases – higher income HHs actually increased their consumption

2009

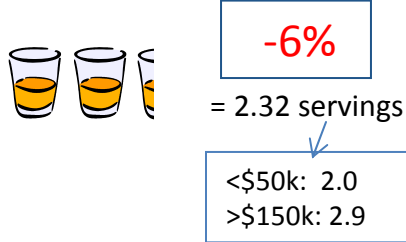
How many servings do you personally consume each day?

-12%

Average Servings of Fruits:



Average Servings of Vegetables:

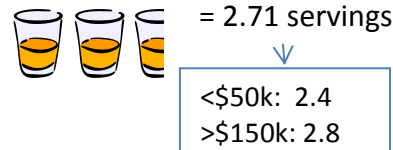


Respondents n = 1000

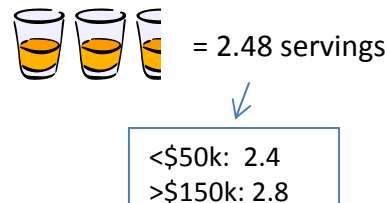
2008

How many servings do you personally consume each day?

Average Servings of Fruits:



Average Servings of Vegetables:

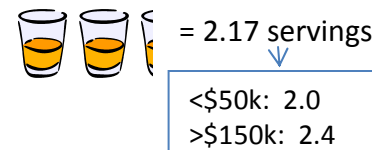


Respondents n = 1000

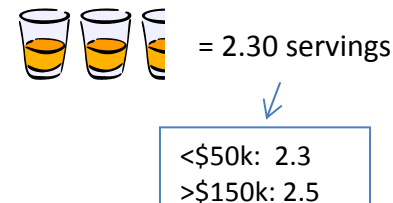
2007

How many servings do you personally consume each day?

Average Servings of Fruits:



Average Servings of Vegetables:

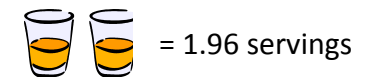


Respondents n = 1000

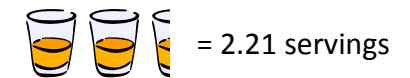
2006

How many servings do you personally consume each day?

Average Servings of Fruits:



Average Servings of Vegetables:



Respondents n = 550

Q15. 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.)

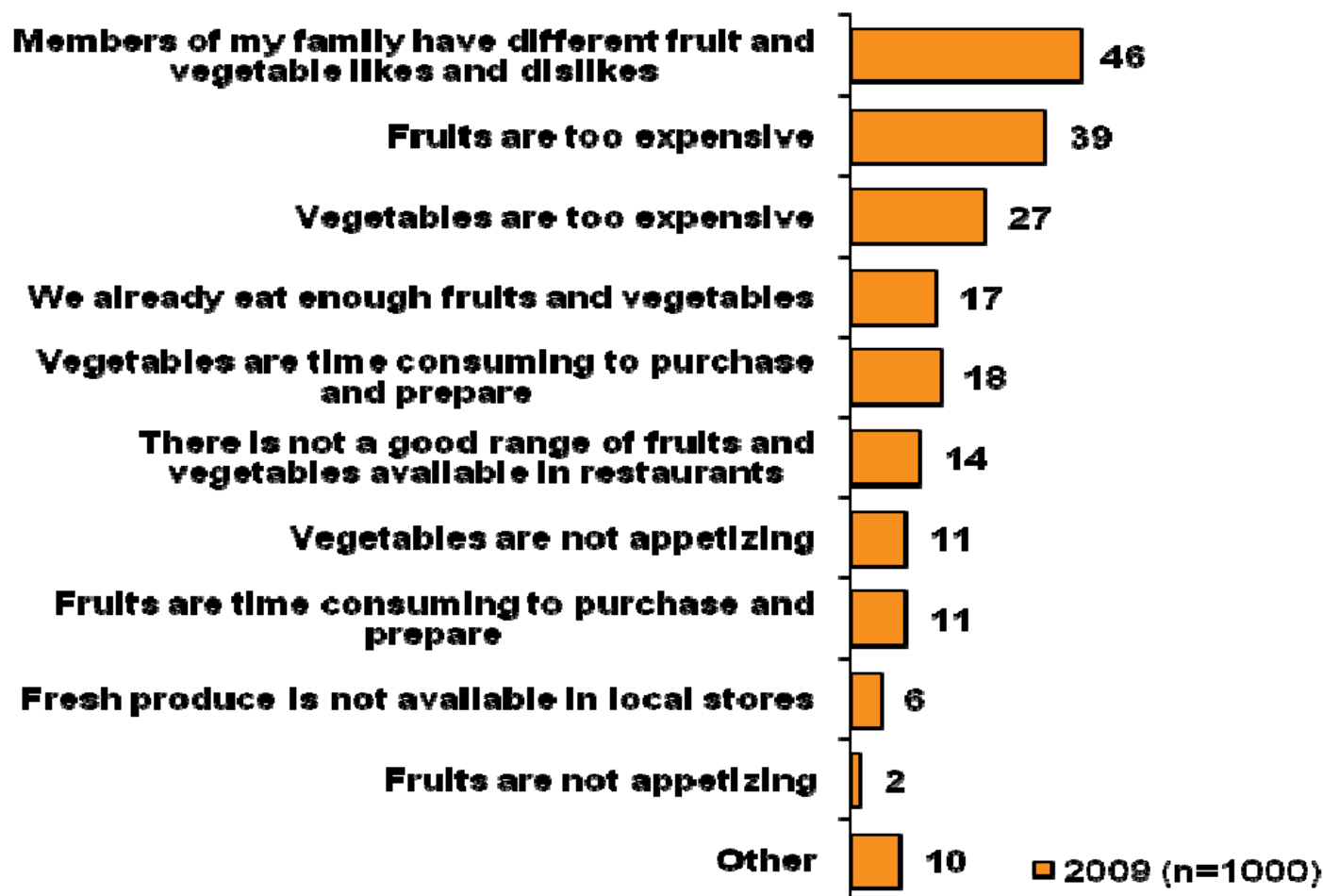
Q17. On average, how many servings of fresh, frozen, canned and dried VEGETABLES or VEGETABLE juice of any sort, including salad, and excluding fries and potato chips, do you eat on a typical day? (A serving is about the size of a tennis ball.)

# Different preferences amongst family as well as the cost of fruit and vegetables are barriers



for 2009

*What makes it difficult to include more fruits and vegetables?*  
2009

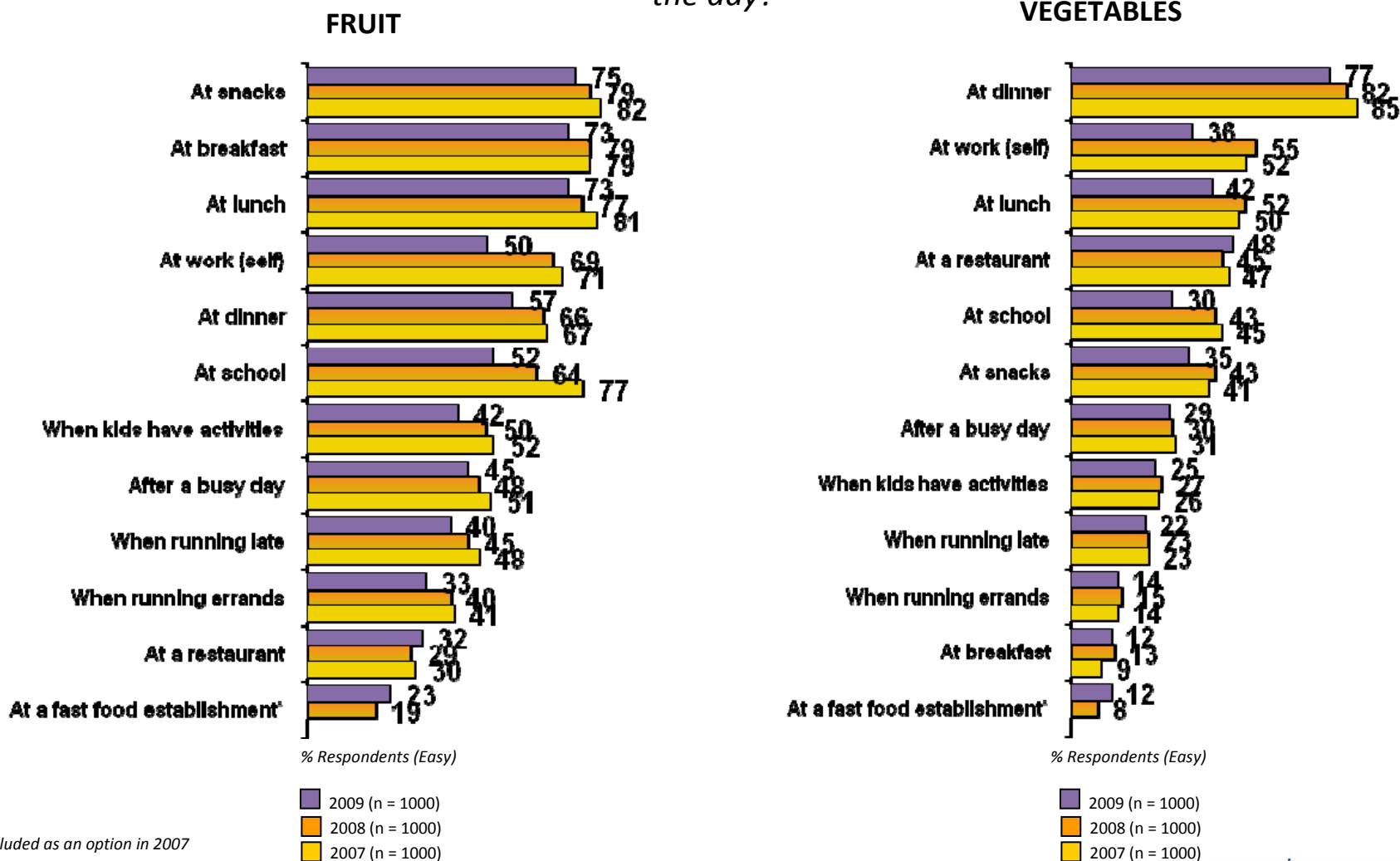


% Respondents

Q48: What makes it difficult for you to include more fruits and vegetables in your family's meals and snacks?  
(Please select all that apply)

# Moms finding it harder to get their family to eat fruit and vegetables during all occasions

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

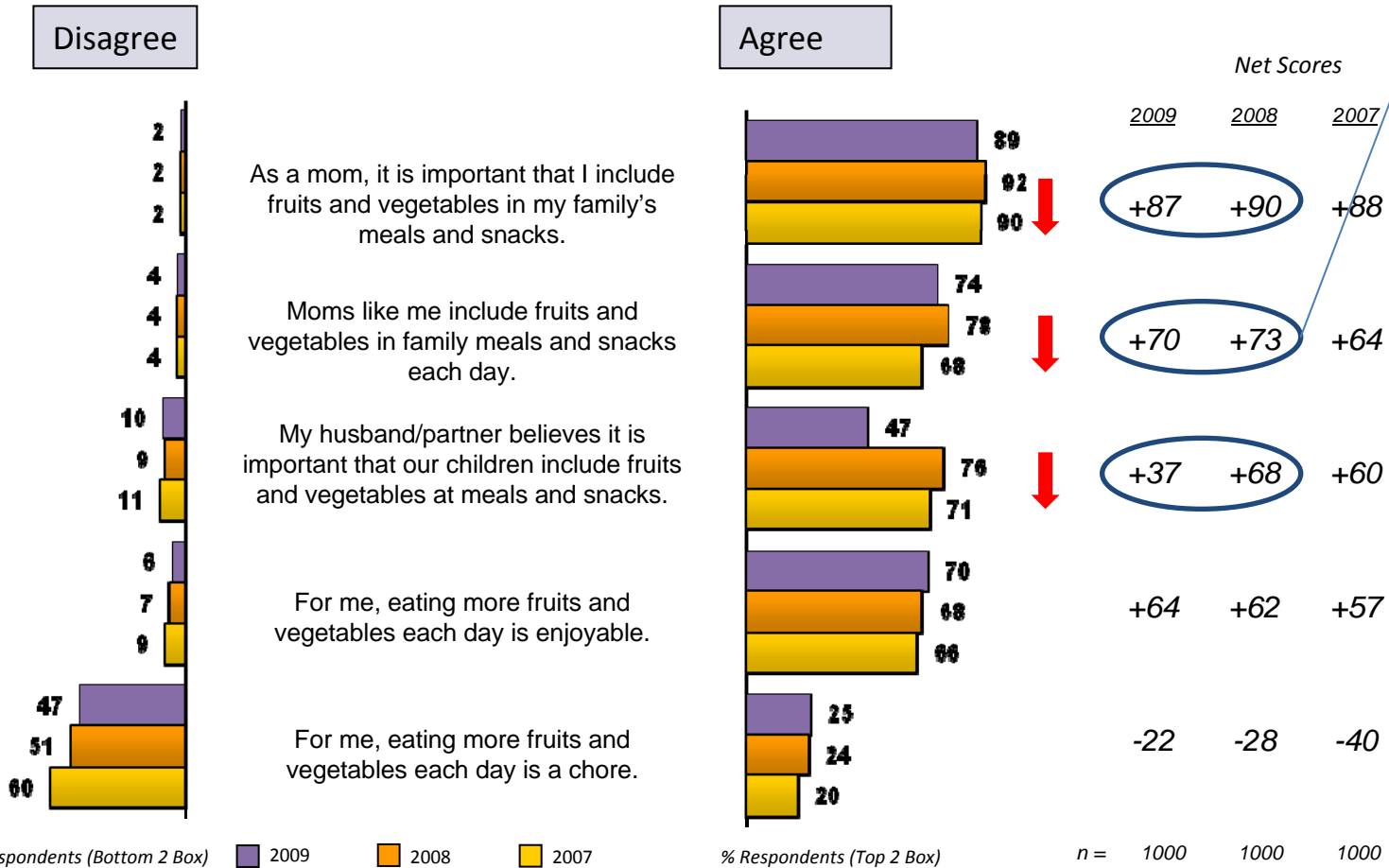


Q49. How easy is it for you to get your family to eat VEGETABLES at the following times?  
 Q50. Please rate how easy it is to get your family to eat FRUIT at the following times?

# Moms and their spouses placing less importance on fruit and vegetables

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

	2009	2008	
<\$25k	+47	+60	(-13)
>\$150k	+93	+72	(+21)

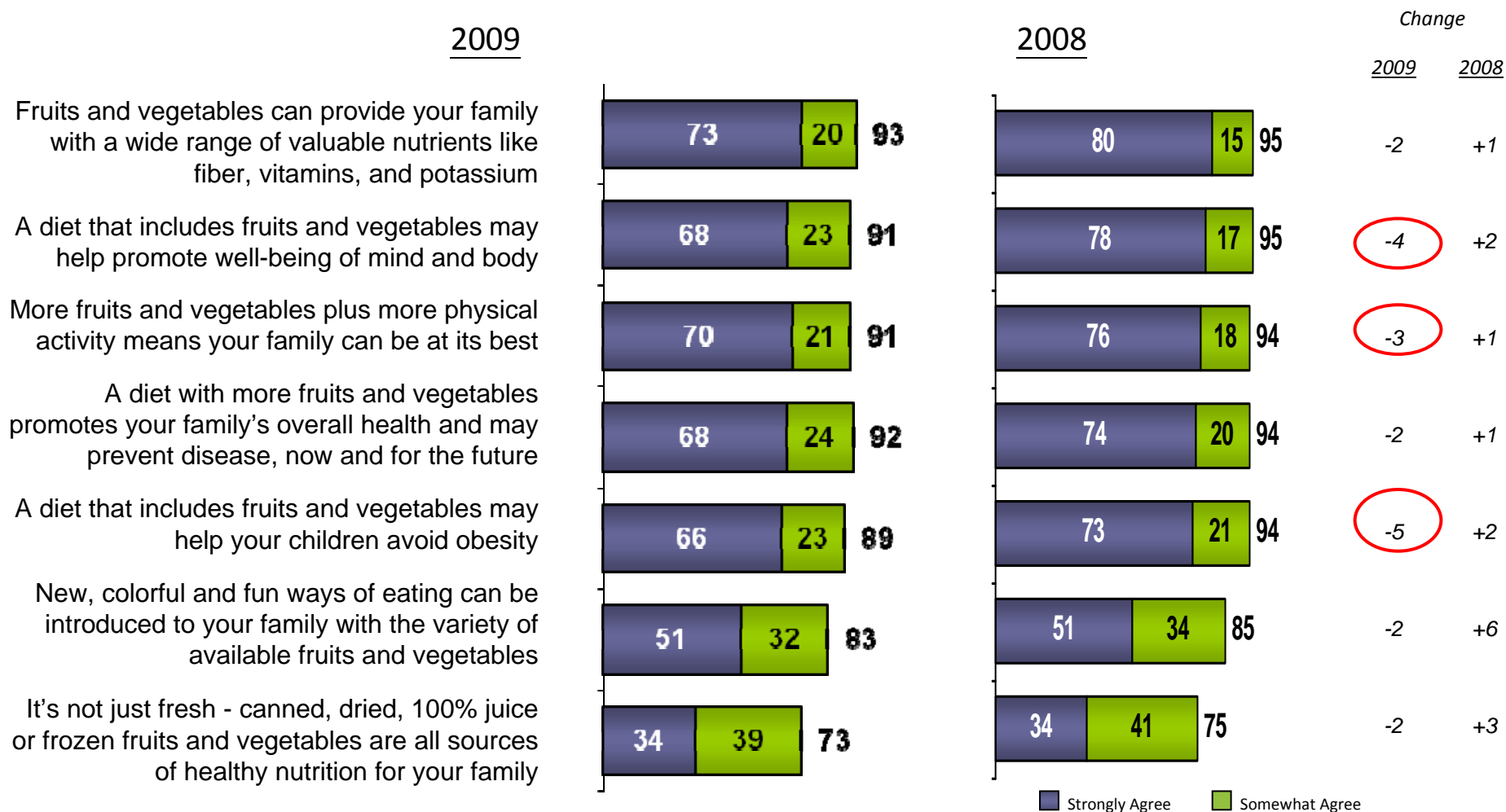


Q44. Please rate your level of agreement or disagreement with the following statements.

Q43. Please indicate your agreement or disagreement with these statements.

# Moms are a little less inclined to believe in some of the benefits of eating fruit and vegetables

## Perceptions of Fruits/Vegetables and Health/Nutrition Issues



% Respondents (Agree), (n = 1000)



Q45. Please review each of the following statements and tell us your level of agreement or disagreement with each.

# Moms are still very concerned about the prevalence of unhealthy eating messages, but a little less so than last year

*"I think our society is too full of messages encouraging unhealthy eating."*

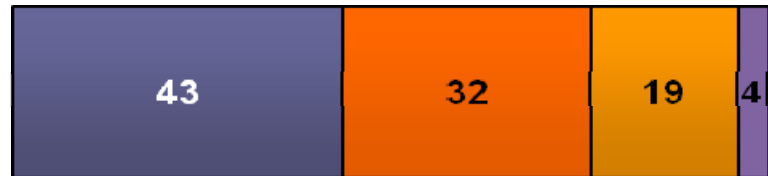
Strongly Agree ← → Strongly Disagree



Top 2 box score:

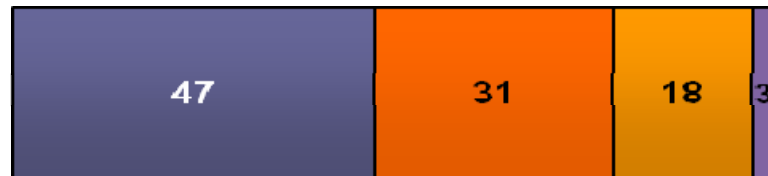
75%

**2009**  
(n = 1000)



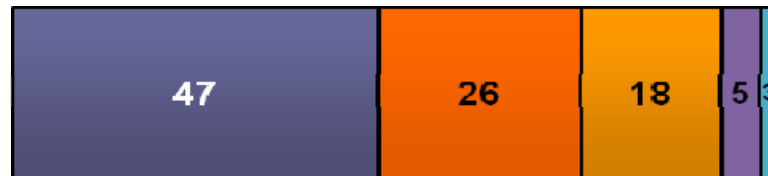
78%

**2008**  
(n = 1000)



73%

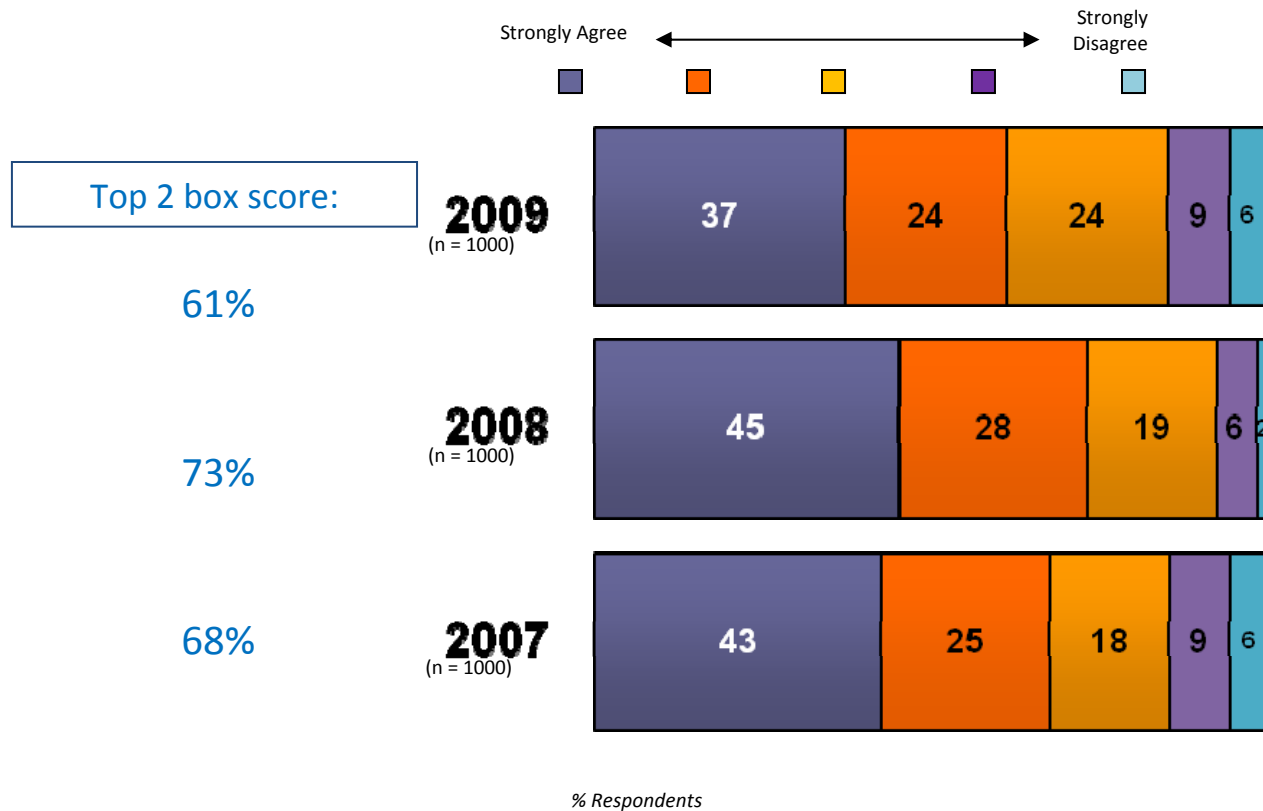
**2007**  
(n = 1000)



% Respondents

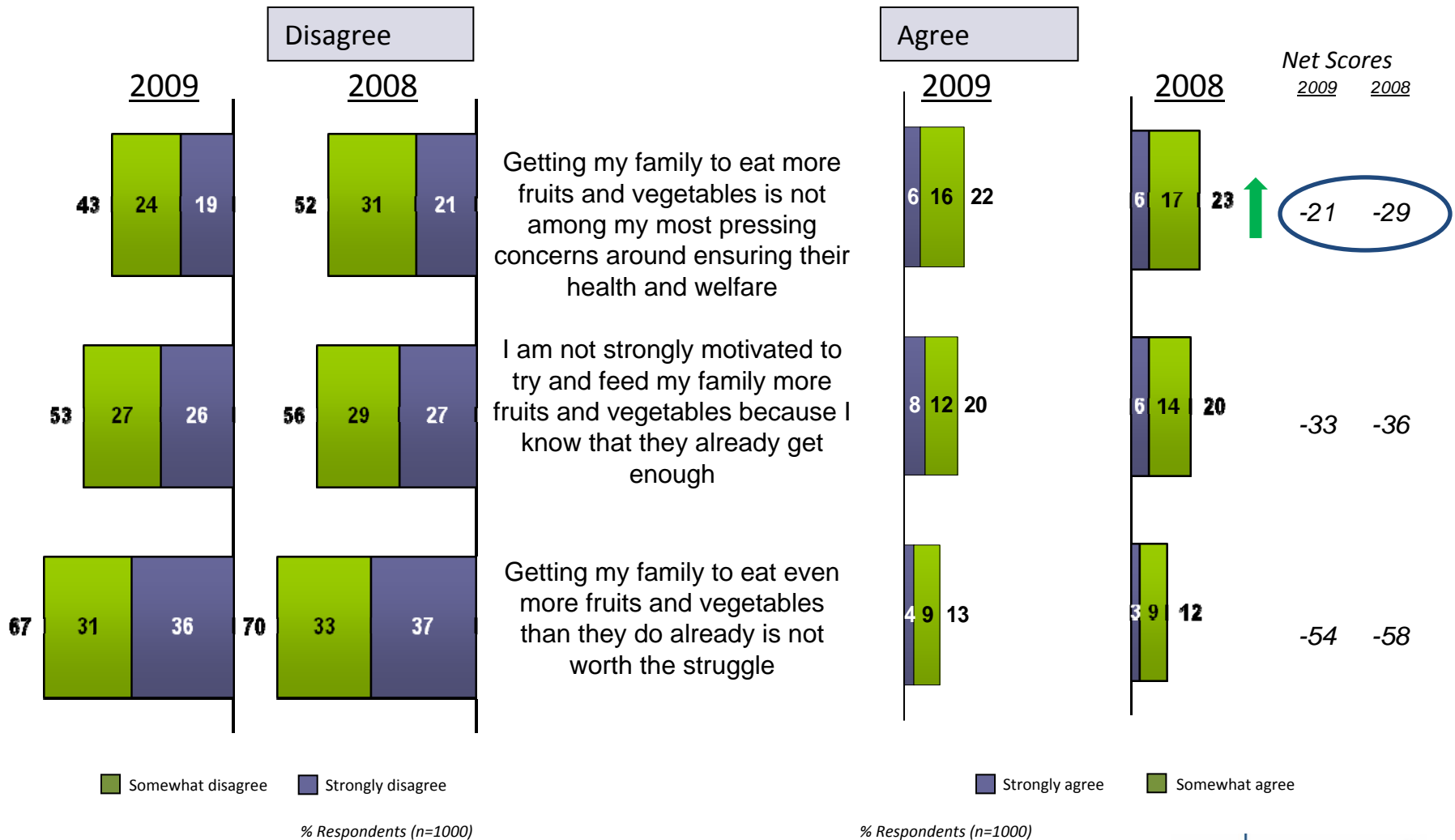
# Most moms still very concerned about obesity in children, but less so than last year

*"I am deeply concerned about how obesity might affect my kids now and when they are adults."*



# Moms are more concerned about other issues than fruit & vegetables in their family's diet

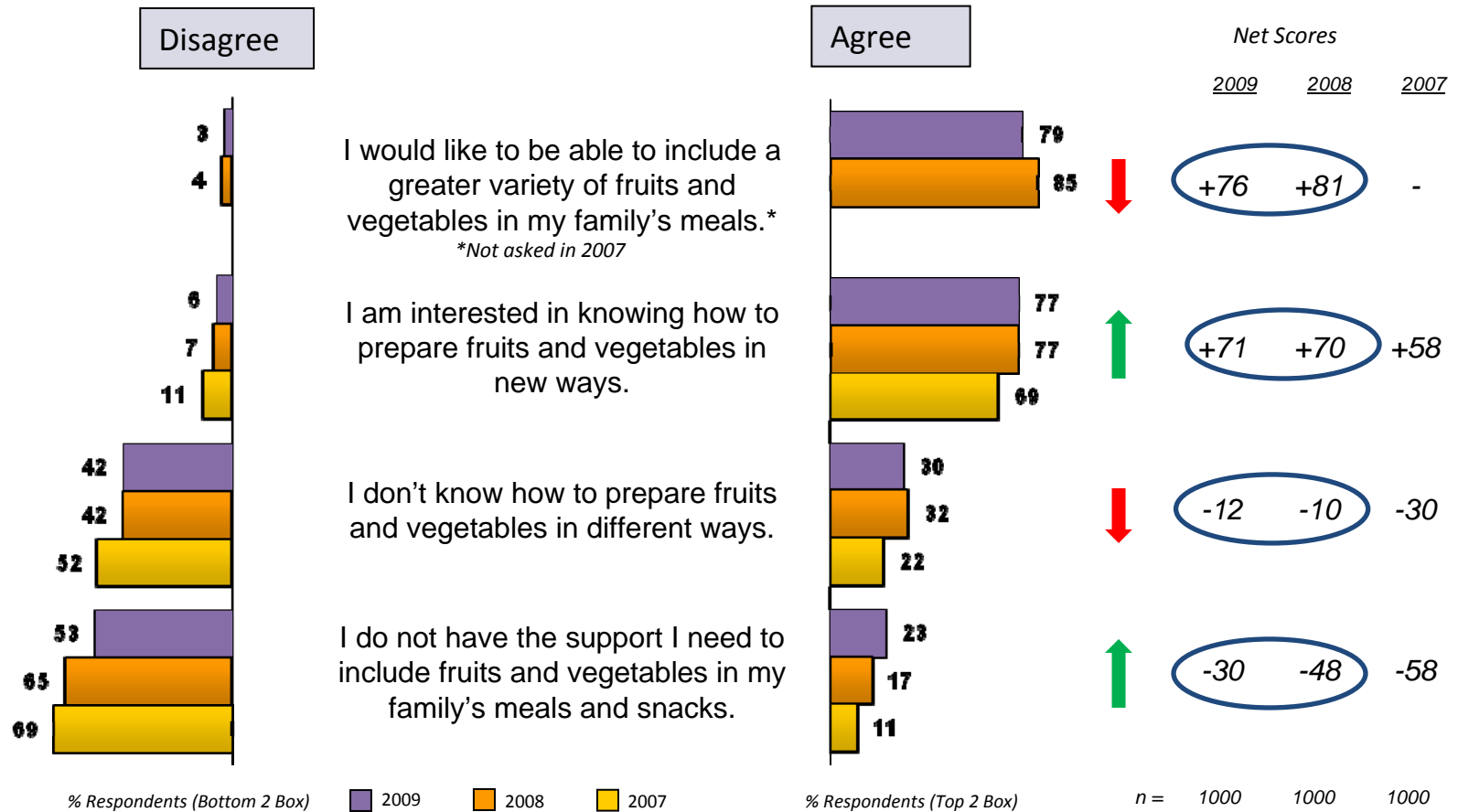
How motivated are you to introduce fruits and vegetables into your family's diet?



Q63. Please review each of the following statements and tell us your level of agreement or disagreement with each.

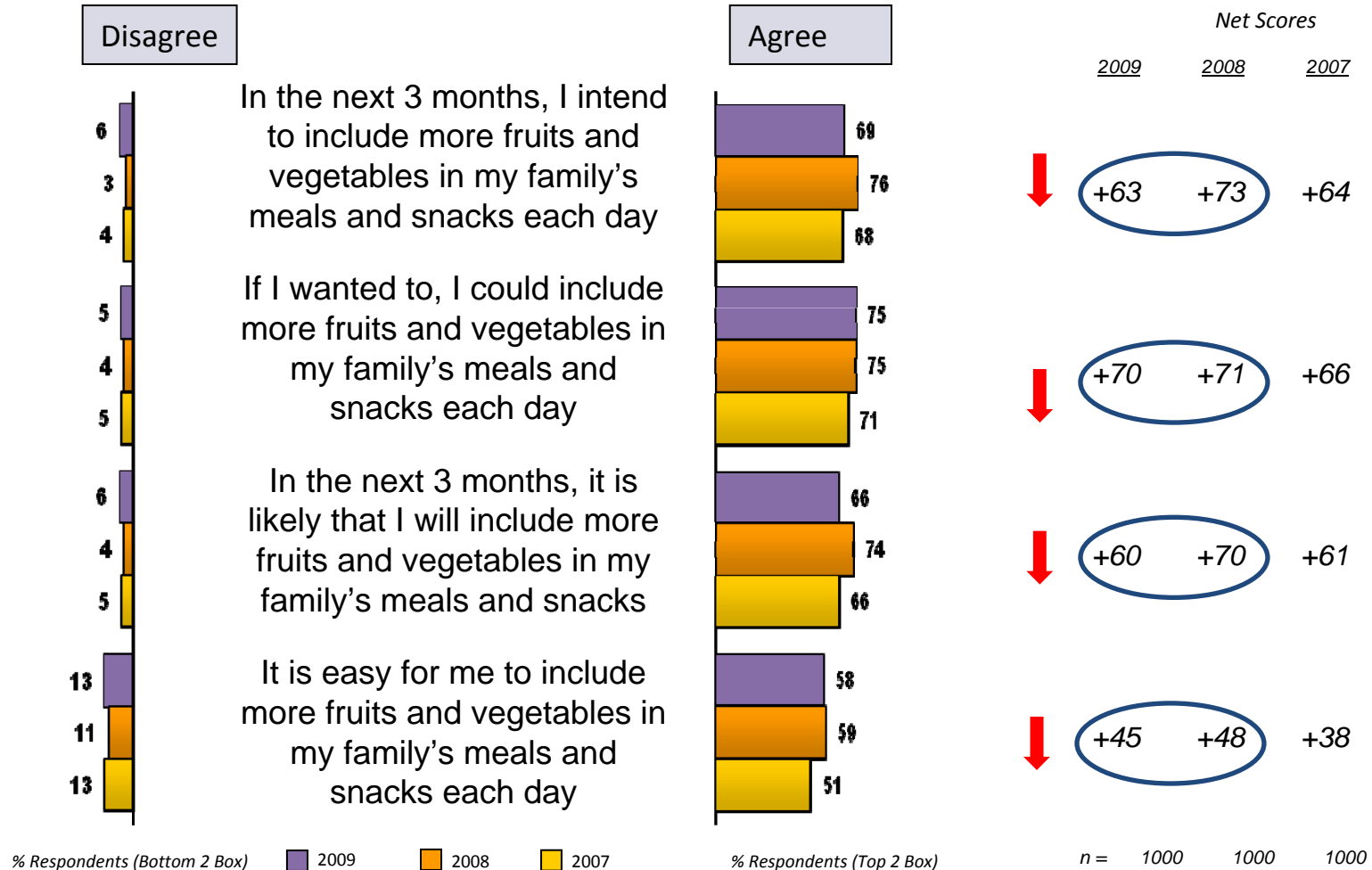
# Moms feel they have less support this year

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



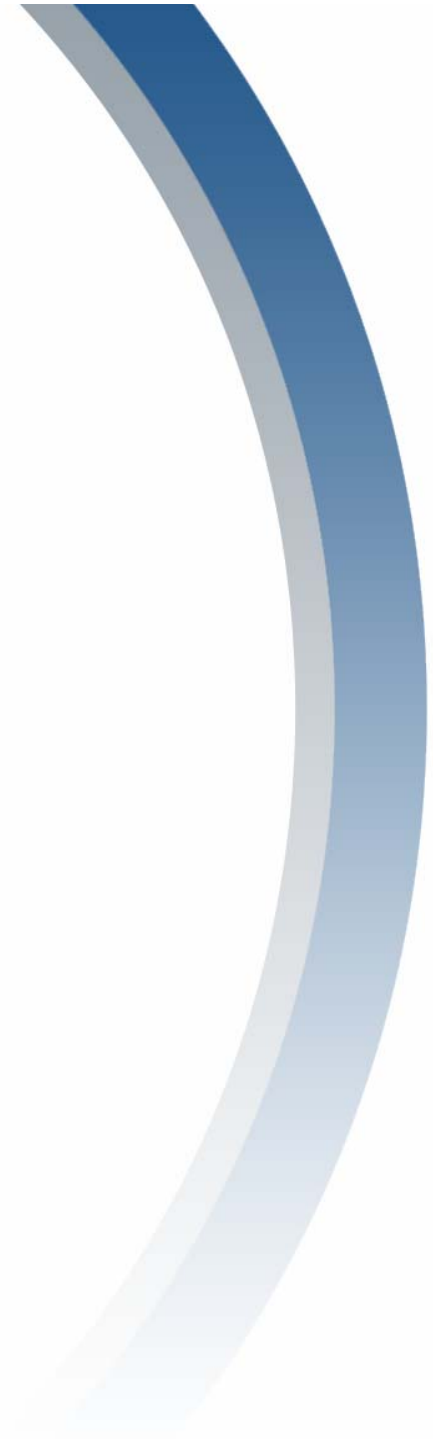
# The worsening economic climate is probably driving lower purchase intent

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



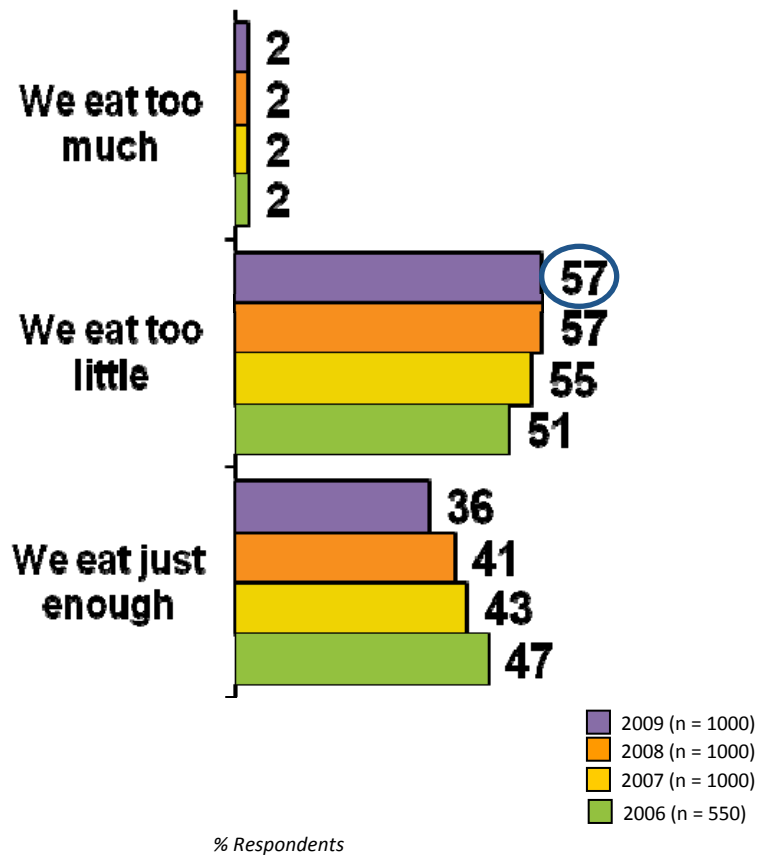
Q43. Please indicate your agreement or disagreement with these statements.

**Opportunities**

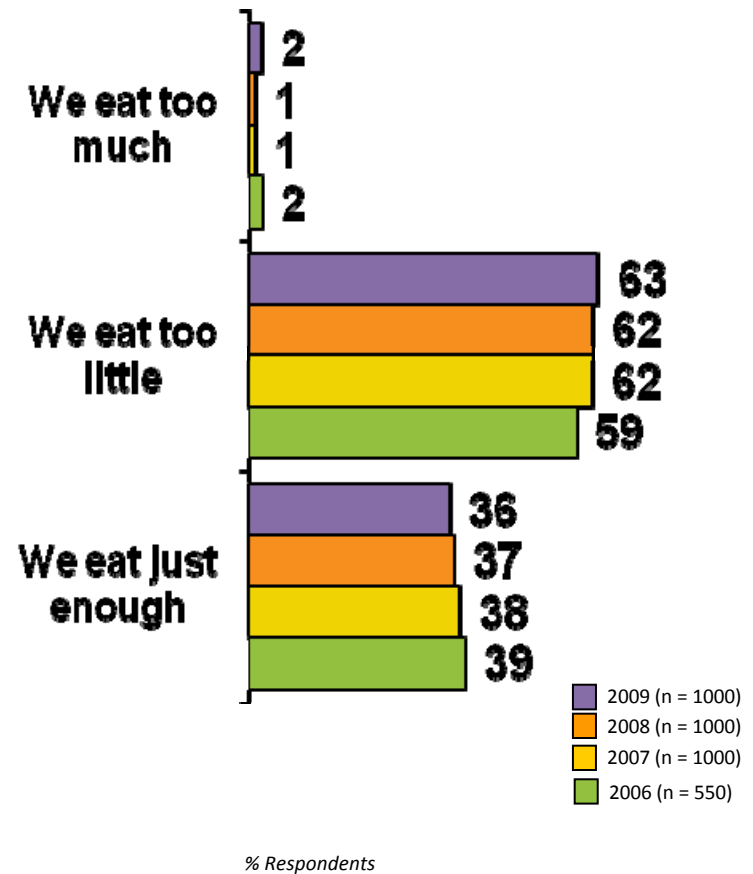


# RECEPTIVITY: Most moms continue to believe that their families eat too little fruit and vegetables

The family's consumption of FRUIT



The family's consumption of VEGETABLES

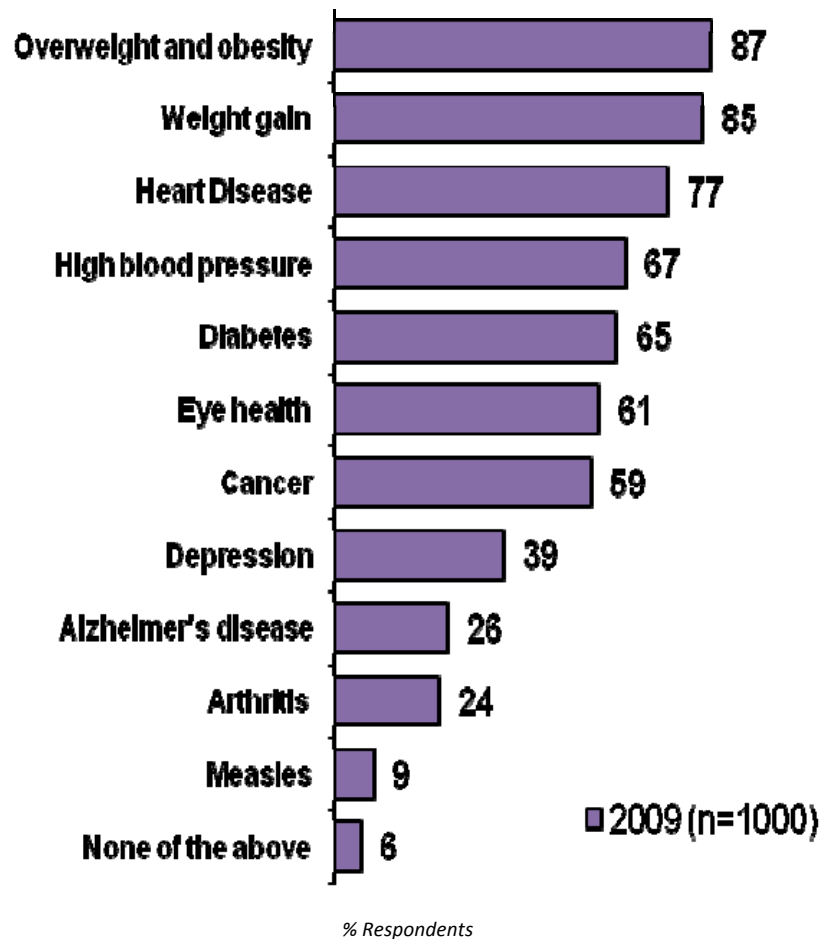


Q19. Which of these statements best represents your family's eating habits for each of the following? (Include fresh, canned, frozen, dried, and 100% juice)

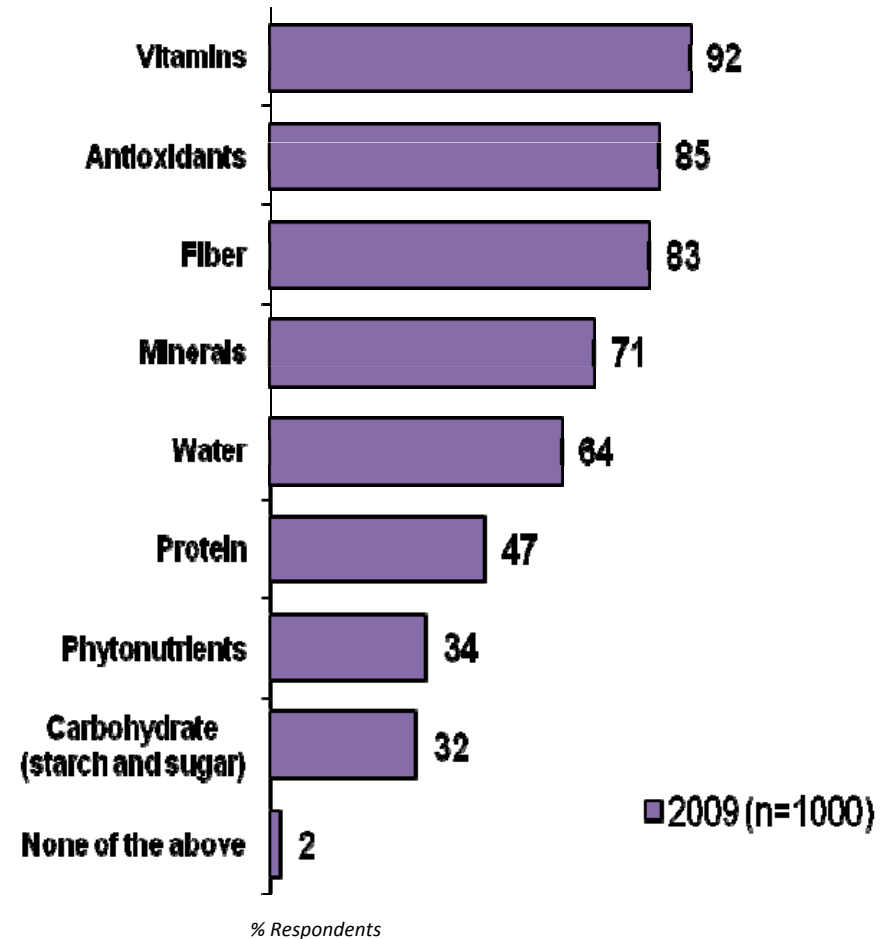
# POSITIONING LEVERS: Most believe that fruit & vegetables have preventative benefits



*Which may fruits and vegetables be beneficial for preventing?*

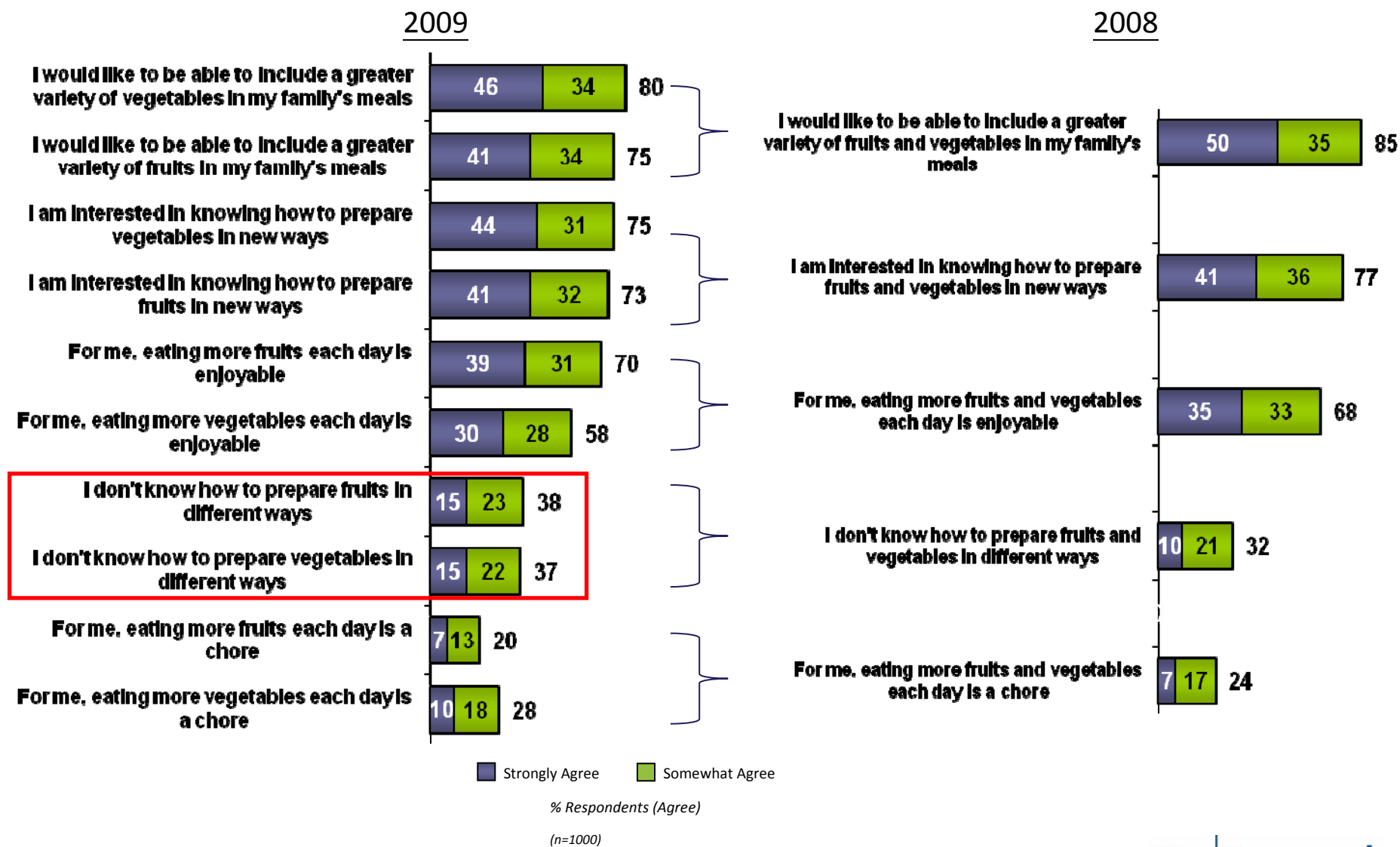


*Which components may provide health benefits?*



Q51: Which of the following do you believe consuming fruits and vegetables may be beneficial for preventing? (Please select all that apply)  
 Q52: Which of the following components of fruits and vegetables do you believe may provide health benefits? (Please select all that apply)

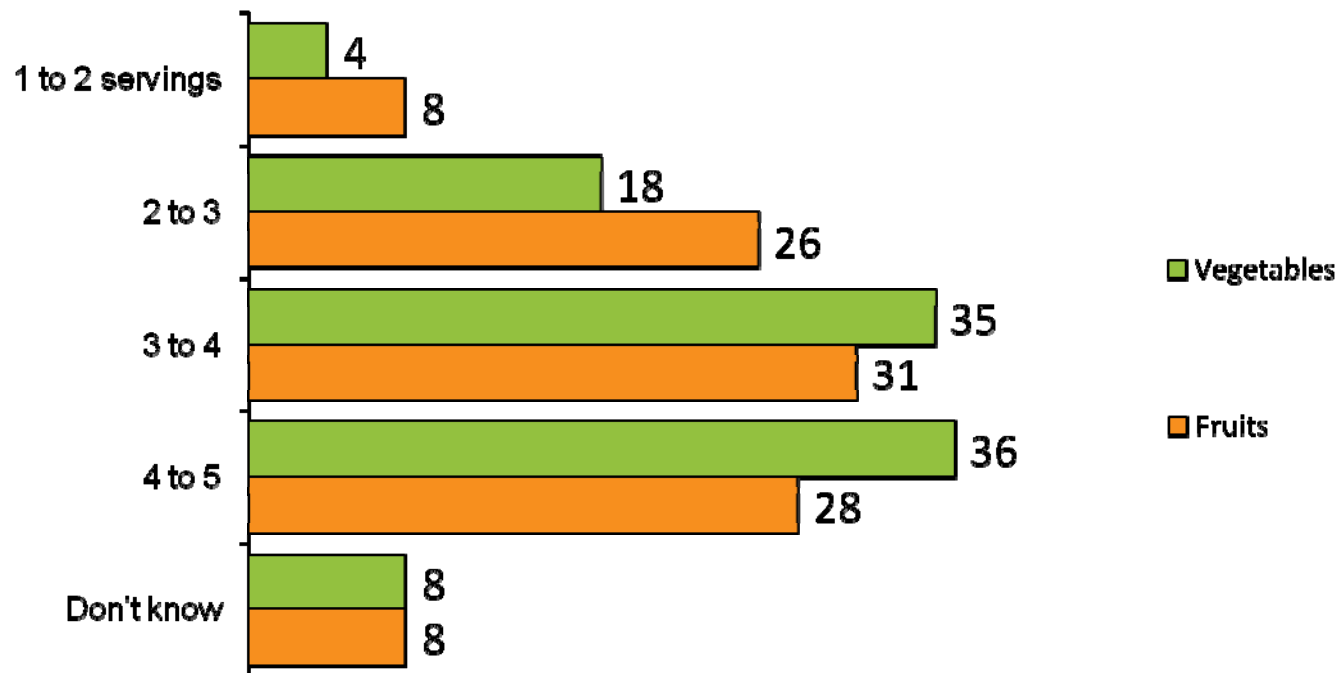
# TOOLS: Majority don't know how to prepare fruit & vegetables in different ways



# EDUCATION: Most moms believe that the recommended daily intake of vegetables is 3 to 5 servings of both fruit and vegetables



### Recommended Intake Estimate

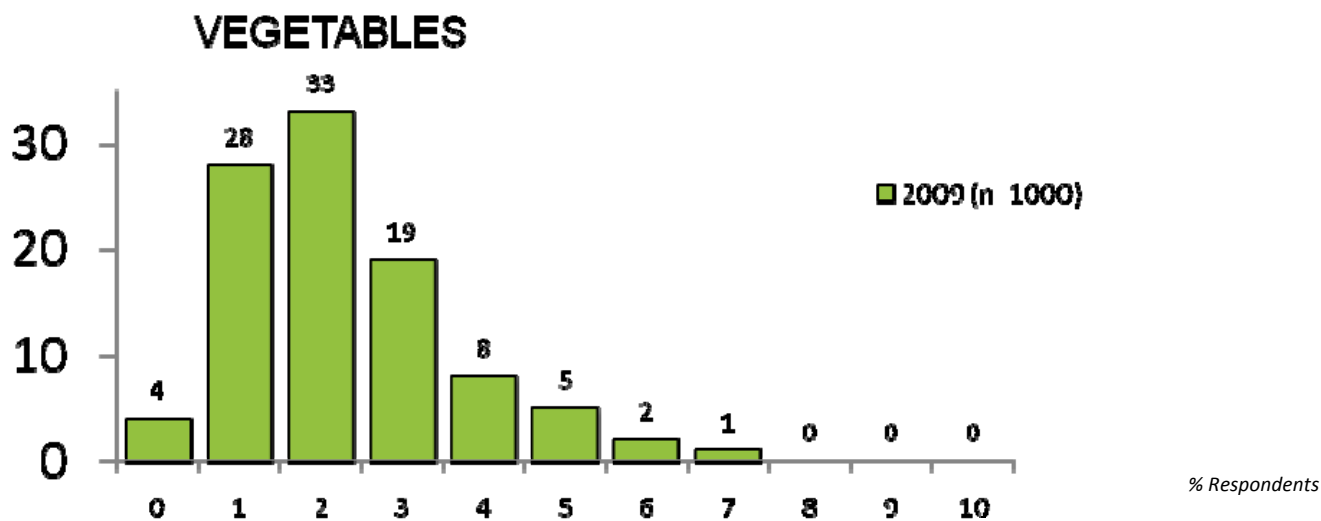
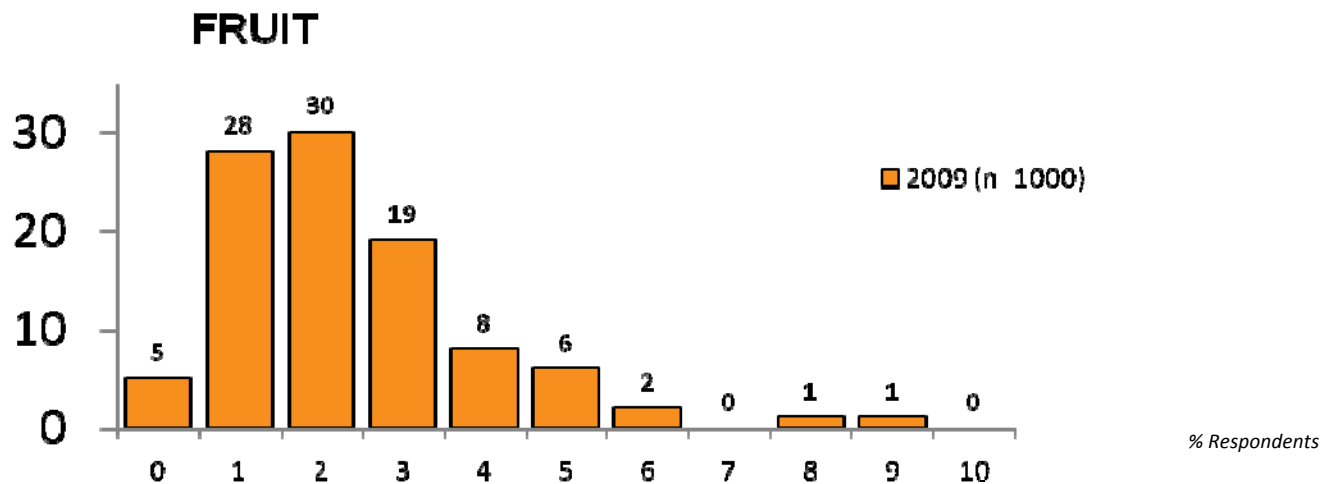


% Respondents  
n=1000

Q20: How many servings of FRUITS are recommended for you to eat every day?

Q21: How many servings of VEGETABLES are recommended for you to eat every day?

# REALITY CHECK: Most moms estimate they consume 1 to 2 servings of both fruit and vegetables each day



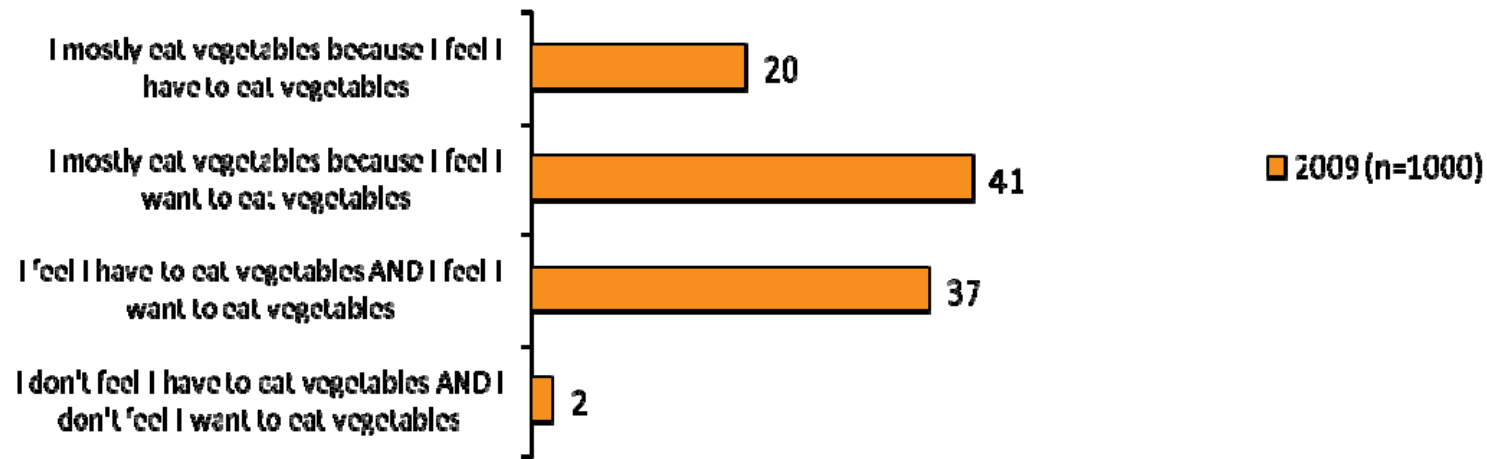
Q15: On average, how many piece of fresh FRUIT, and servings of juice, frozen, canned and dried FRUIT of any sort do you eat on a typical day? (A serving is about the size of a tennis ball.)

Q17: 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.)

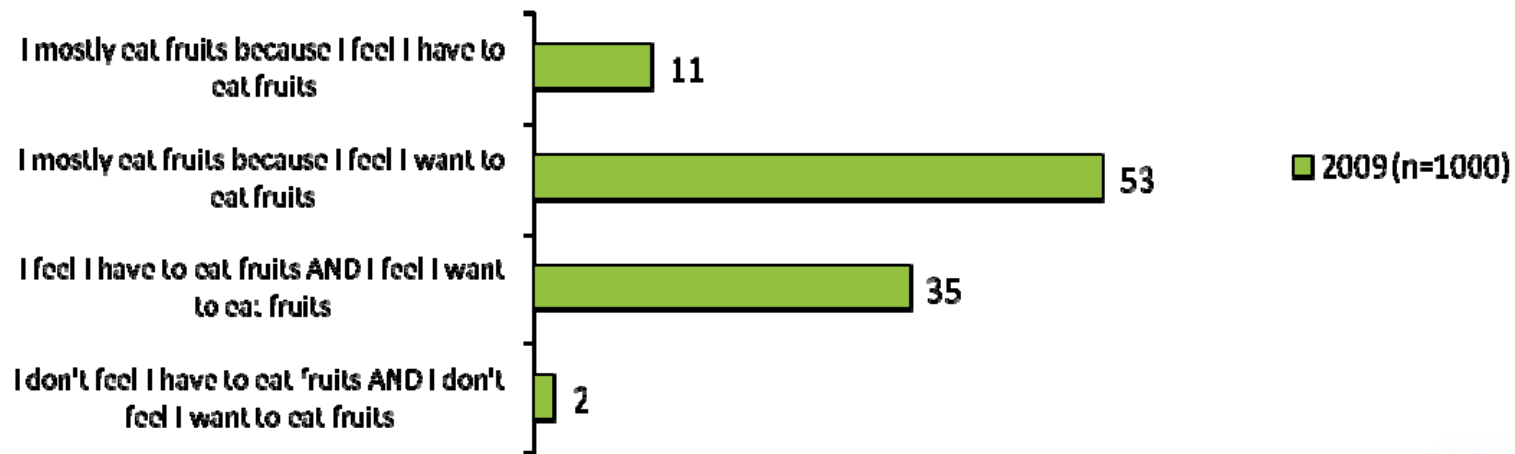
# PRIORITY: Vegetables are less popular than fruits



## Attitude Toward Eating VEGETABLES



## Attitude Toward Eating FRUITS



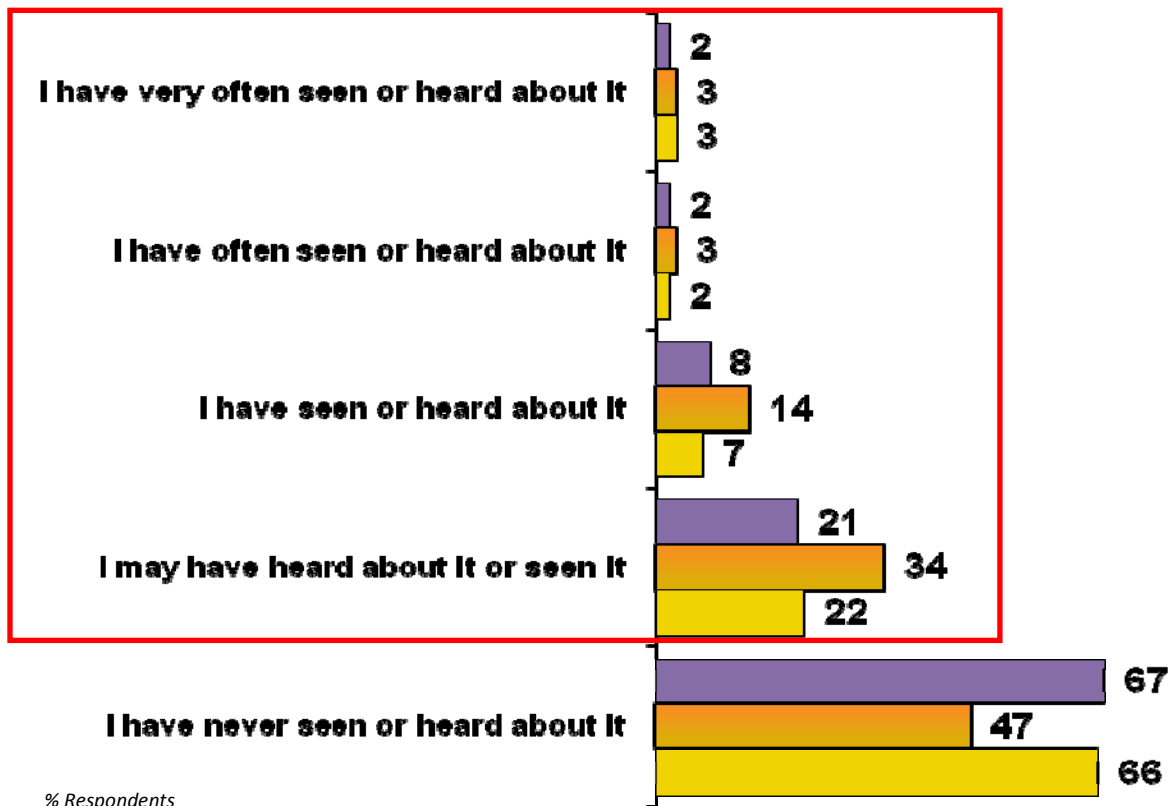
Q41: Which of the following best describes your attitude toward eating VEGETABLES?  
Q42: Which of the following best describes your attitude toward eating FRUITS?

# Campaign Awareness and Impressions

# Total possible awareness (including those that “may have heard or seen”) of the More Matters logo declined significantly



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



**Total possible awareness:**  
 33% (2009) **-20%**  
 53% (2008)

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

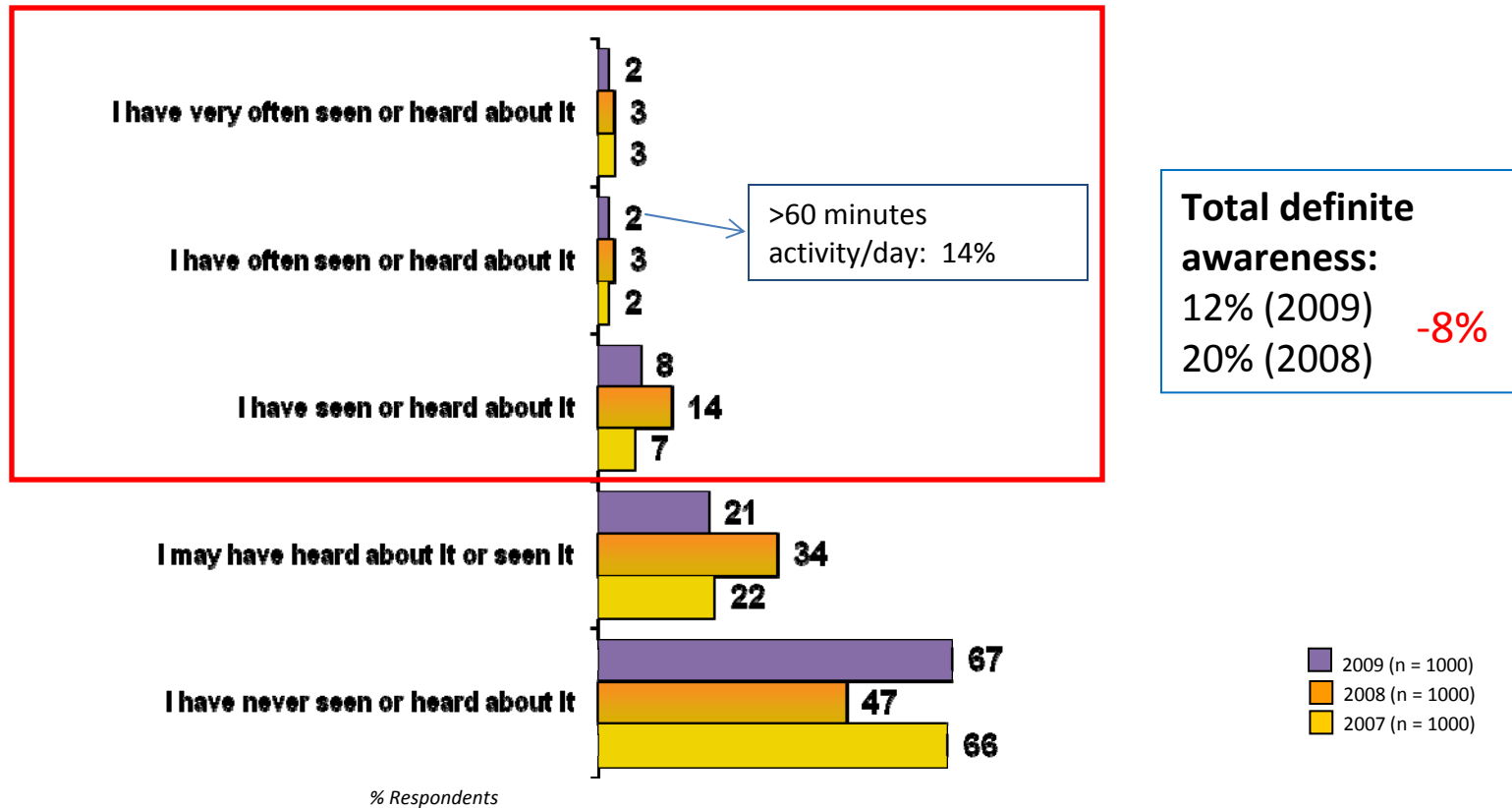
% Respondents

Q54. Which of the following statements best describes your level of familiarity with Fruits & Veggies—More Matters™?

## Total definite awareness, however, declined less significantly



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



Q54. Which of the following statements best describes your level of familiarity with Fruits & Veggies—More Matters™?

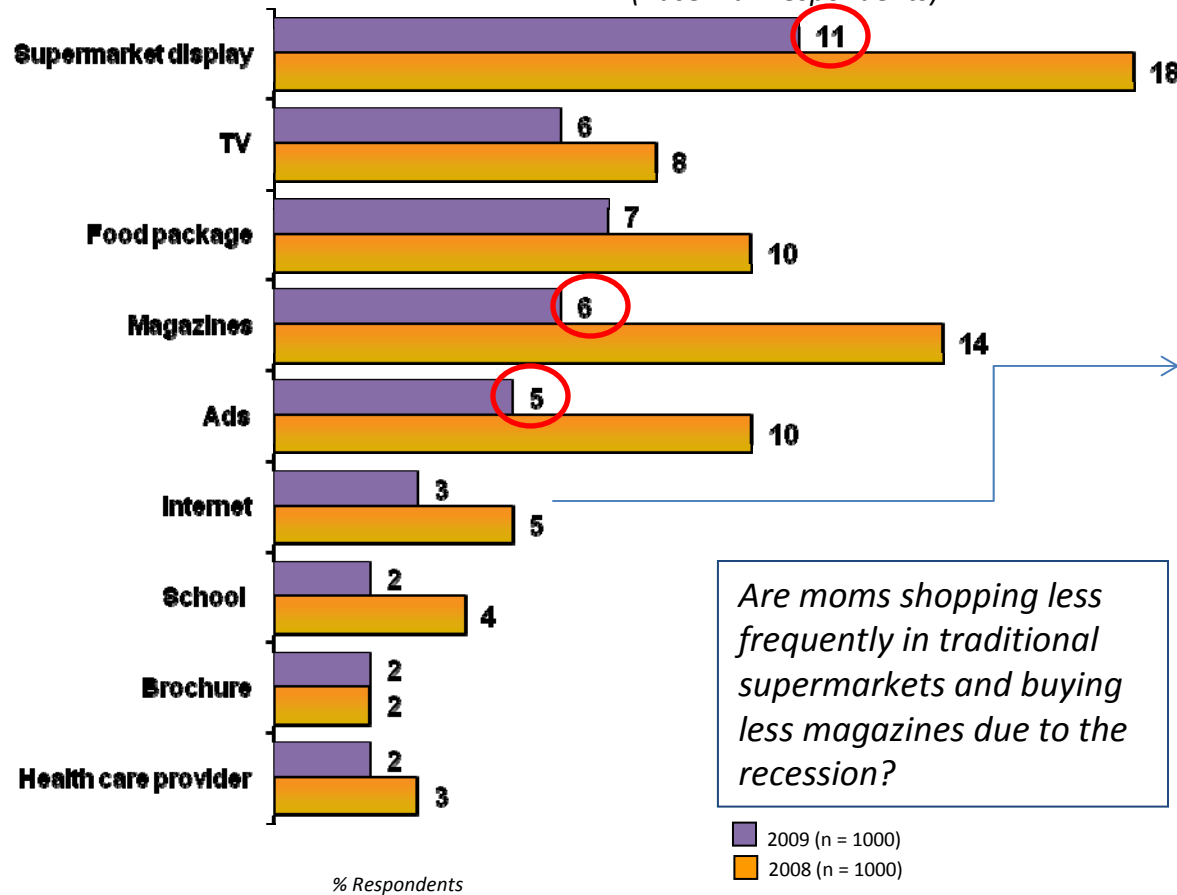
*% Respondents*



# Total awareness dropped primarily due to less recognition from Supermarket displays, Magazines and Ads



How did you become familiar with the logo?  
(Base = all respondents)

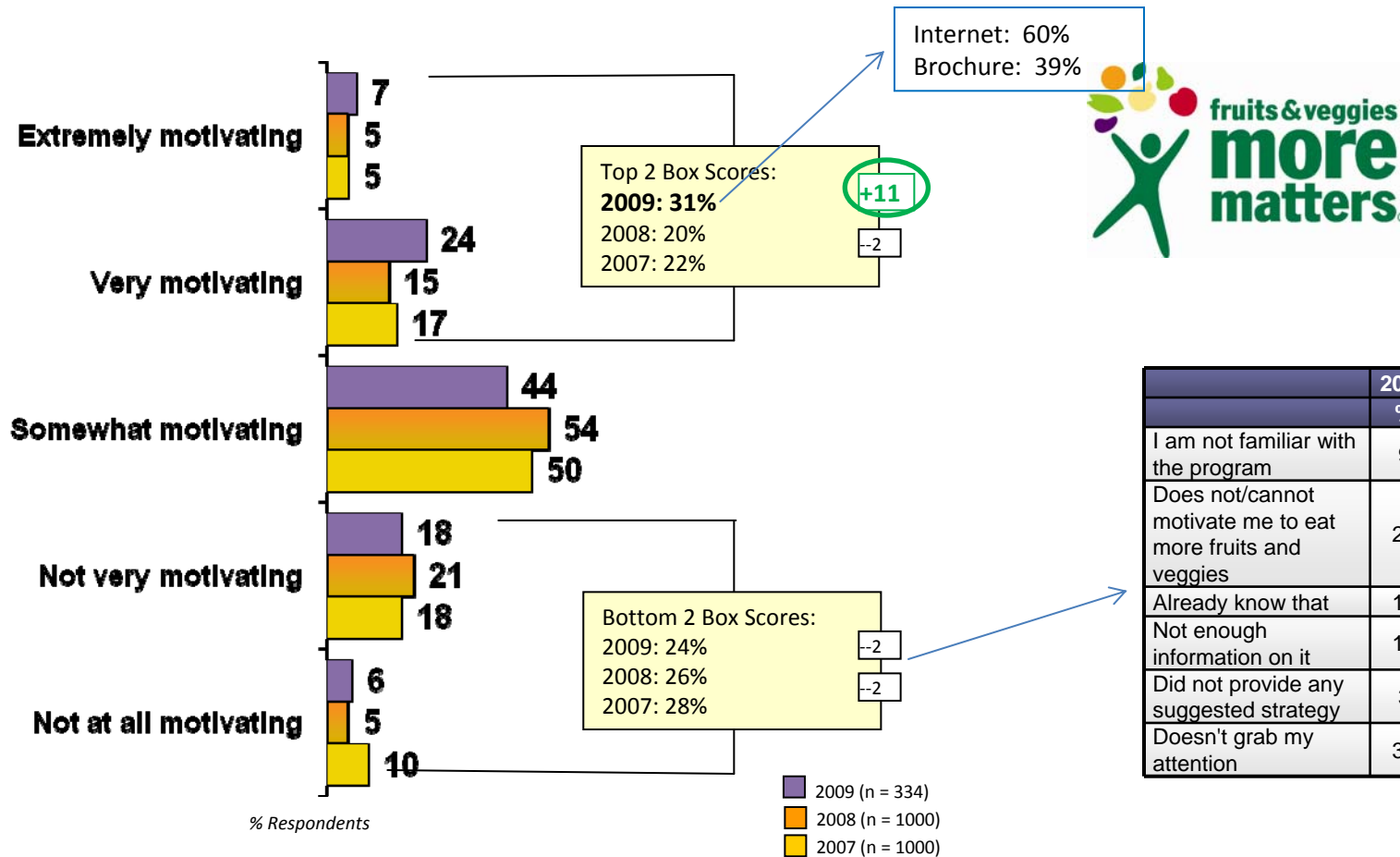


Are moms shopping less frequently in traditional supermarkets and buying less magazines due to the recession?

Sources of Awareness for those who visited website (n=18)	
Food package	32%
TV	32%
Internet	30%
Billboard	28%
Ads	22%
Word of mouth	20%
Supermarket display	19%
Government	18%
School	16%
Health care provider	13%
Newspapers	13%
Radio	13%
Brochure	9%
Books	8%
Magazines	7%

# The motivational impact of the campaign improved significantly – the Internet and brochures are strong channels

How well do you believe Fruits & Veggies—More Matters™ motivates you to help your family to eat more fruits and vegetables?  
 (In 2009, only asked to those aware of logo)



# Consumption appears to increase with campaign awareness, particularly regarding vegetables

2009

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

Average Servings of Fruits:



= 2.38 servings

Average Servings of Vegetables:

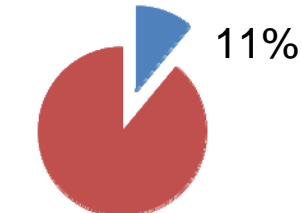
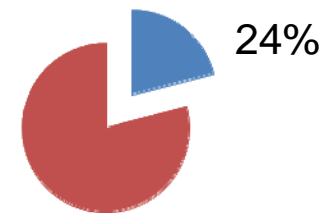
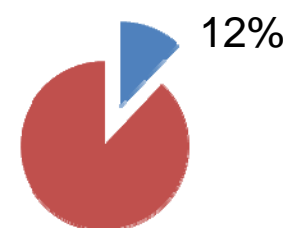
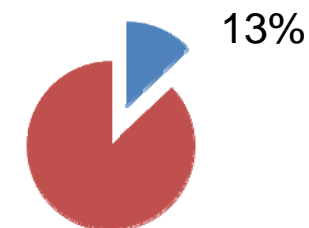
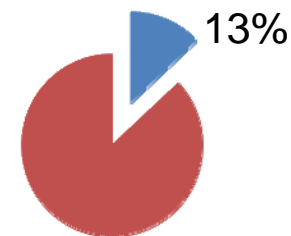


= 2.32 servings

Respondents  $n = 1000$

*\*includes those who stated they had seen or heard about it, often seen or heard it and very often seen or heard about it*

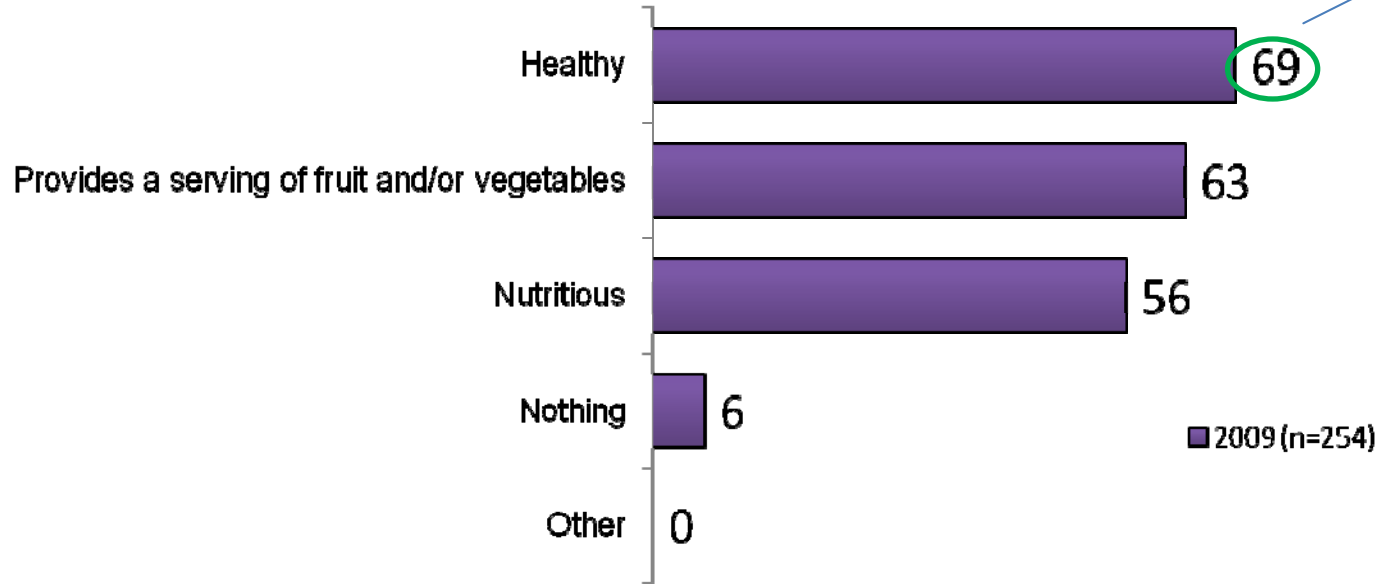
## Definite\* Logo Awareness





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

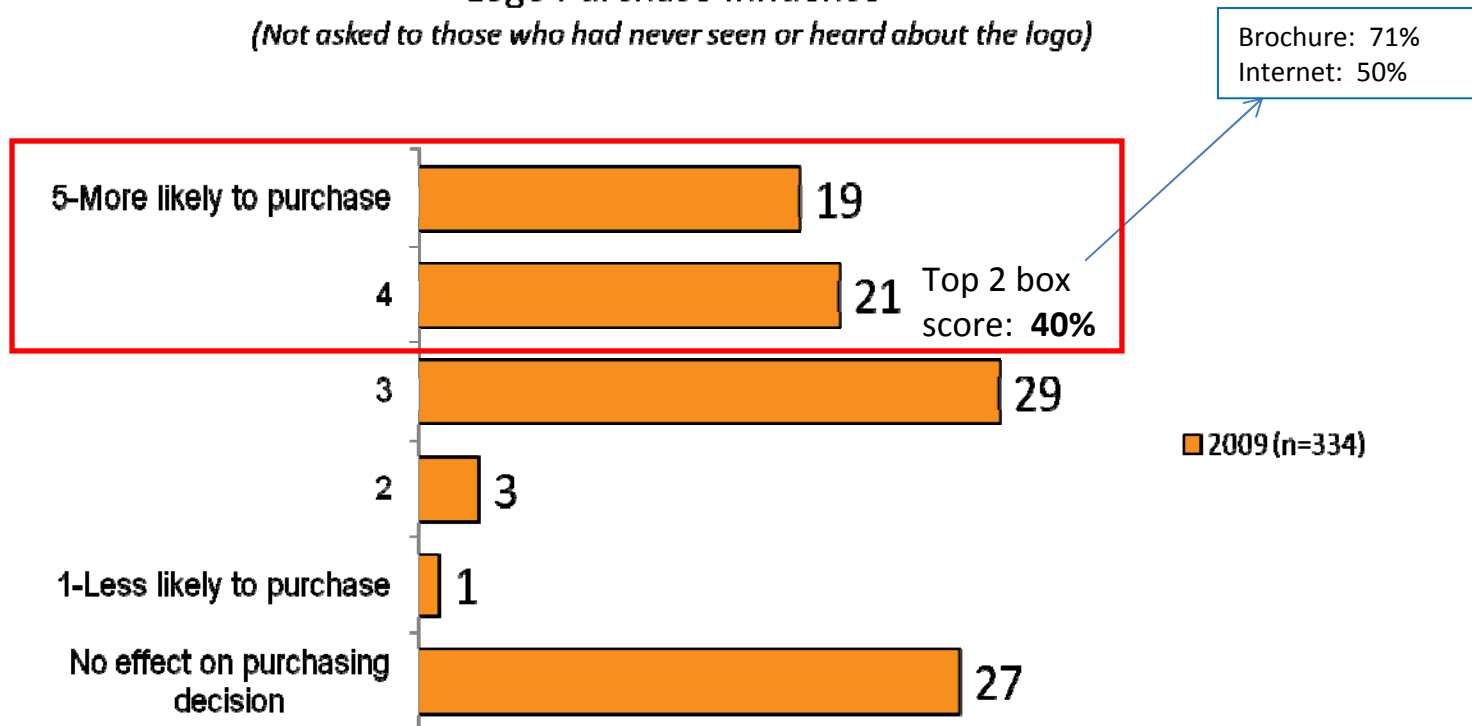
Internet: 88%  
Brochure: 84%  
Supermarket display: 82%



... and has a positive influence on purchase behavior

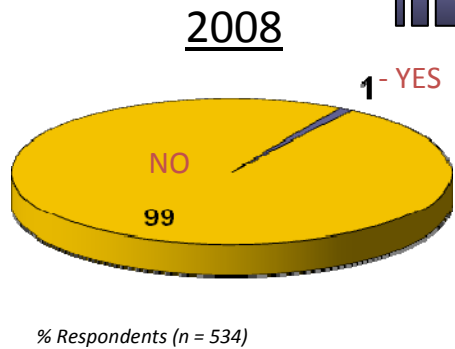
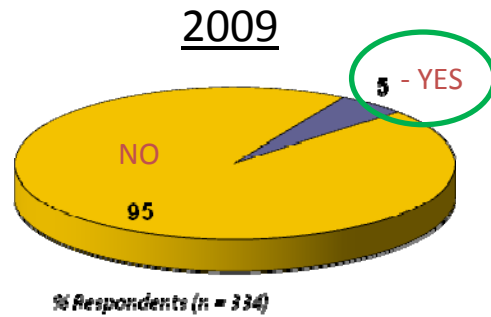


Logo Purchase Influence  
(Not asked to those who had never seen or heard about the logo)

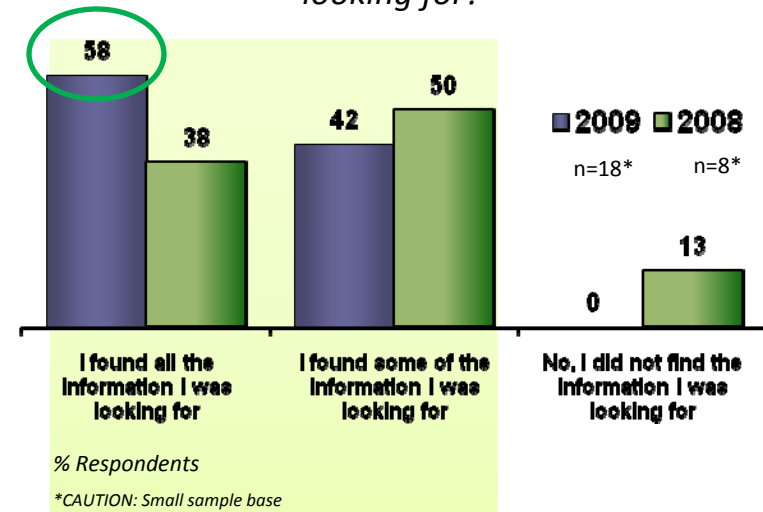


# Website metrics (traffic, user experience) appear to have improved

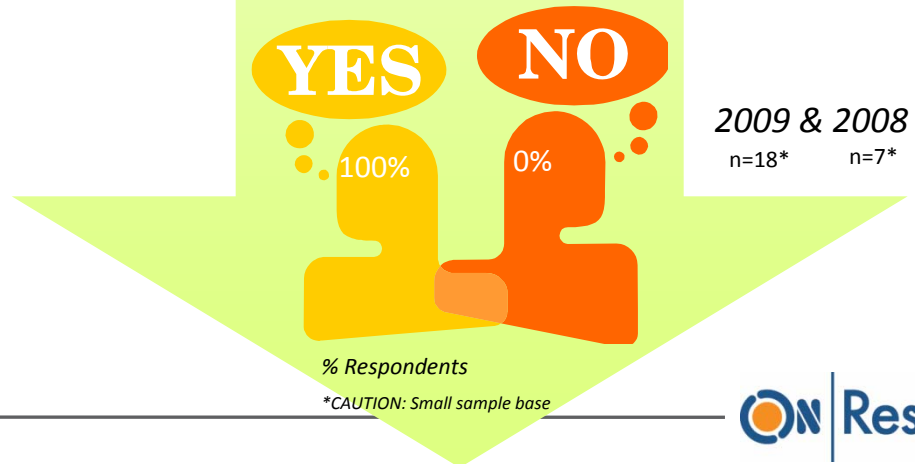
Have you visited [www.fruitsandveggiesmorematters.org](http://www.fruitsandveggiesmorematters.org)?



Did you find the information you were looking for?



Did you use the information you obtained from the site?



Q60. Have you visited [www.fruitsandveggiesmorematters.org](http://www.fruitsandveggiesmorematters.org)?

Q61. Did you find the information you were looking for?

Q62. Did you use the information you obtained from the site?

# Summary and Recommendations

## Summary and Recommendations

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### KEY FINDINGS

- Mothers continue to strongly believe in the benefits of fruit and vegetables and continue to be concerned that their families are not consuming enough of them
- However, the recession is having a significant negative impact on lower income mothers' attitude and behavior regarding fruit and vegetables – as a result, the overall market trend is a decrease in consumption and in the importance associated with a diet, which includes fruit and vegetables. Higher income mothers, however, actually increased their consumption levels
- General awareness (including those who may have heard or seen the campaign) of the More Matters logo dropped this year, but definite recognition of the campaign remained more constant – awareness of the campaign, however, has a positive influence on consumption
- Awareness dropped in 3 key channels: supermarket displays, magazines and ads
- The campaign, however, is resonating more strongly this year – positive brand association, purchase intent and persuasion (motivation) are all quite high. The Internet, brochures and supermarket displays are particularly strong channels

## Key Findings and Recommendations

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### RECOMMENDATIONS

- Continue to leverage PBH's core strategy – the campaign is resonating well with the target market and appears to help drive increased consumption
- During difficult economic periods, exposure to the campaign is likely to be negatively impacted as lower income mothers shift priority away from healthy eating
- Continue to develop programs (tools, advice, etc.) that may help Moms continue to incorporate these products in their family's diets – consider addressing the issue directly using survey findings as support
- Continue to successfully tap into the Internet as a key channel to reach and influence the market.