Ipsos Forward Research

GEORGE MORRIS CENTRE

George Morris Centre

2009 Vineland New Canadian Quantitative Segmentation Study

Final Report

September 2009

Nobody's Unpredictable

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Background

The fresh whole-fruit industry in Ontario has a number of opportunities and strengths, but it also faces considerable competition. One way to build a positive "brand" for the industry is to ensure an understanding of consumers' definition of quality, and to ensure the value chain delivers that quality. Tying together an understanding of what consumers regard as quality and the value chains definitions of quality provides the opportunity to assess strategic alignment and identify the changes needed in order to bring value to Ontario's customers, and increase market share.

Ipsos has been commissioned by the George Morris Centre to conduct a multi-phase research study designed to understand consumer behaviour and attitudes as they relate to fruit and provide the industry with strategic insight into opportunities. As part of this research, the following research phases have been conducted:

- I Ethnographic Store Walk-Throughs
- II Quantitative Consumer Segmentation Research
- III Qualitative Research with New Canadians
- IV Quantitative Consumer Segmentation with New Canadians

This report summarizes phase IV, a quantitative segmentation of Canadians born outside of Canada who have moved to Ontario during the past 10 years.

Research Purpose & Objectives

Research Purpose:

The primary purpose of this research was to better understand consumers of fresh whole-fruit by identifying distinct opportunities among ethnic grocery shoppers.

Research Objectives:

Objects of this research study include, but are not limited to:

- Understanding consumer involvement with fresh whole-fruit;
- Measuring expenditure on food overall and fresh whole-fruit;
- Determining frequency in purchase of various fruits;
- Measuring purchase volume of fresh whole-fruit during winter and summer months;
- Identifying the primary location where consumers purchase fresh whole-fruit;
- Assessing the importance of specific fruit attributes;
- Identifying the role of fruit in the lives of consumers;
- Exploring consumer shopping habits and attitudes;
- Evaluating the degree to which consumers actively look for origin of fruit;
- Assessing the importance of and reasons for purchasing locally grown products;
- And, uncovering fruit attribute association with Canadian or American produce.

Methodology

- This study was conducted via an online survey methodology. Sample for this study was derived from Ipsos proprietary panel of approximately 3,000 new Canadians.
- The study was fielded between August 20th and 24th, 2009 with 491 total surveys completed. Based on this sample size, n=491, maximum statistical margin of error is +/-2.89% at the 95% confidence interval.

  Canadians of South Asian Origin
  - New Canadians (1 – 5 years in Canada) of South Asian origin, n= 73
  - Established Canadians (6 – 10 years in Canada) of South Asian origin, n= 164

  Canadians of Chinese Origin
  - New Canadians (1 – 5 years in Canada) of Chinese origin, n= 26
  - Established Canadians (6 – 10 years in Canada) of Chinese origin, n= 164

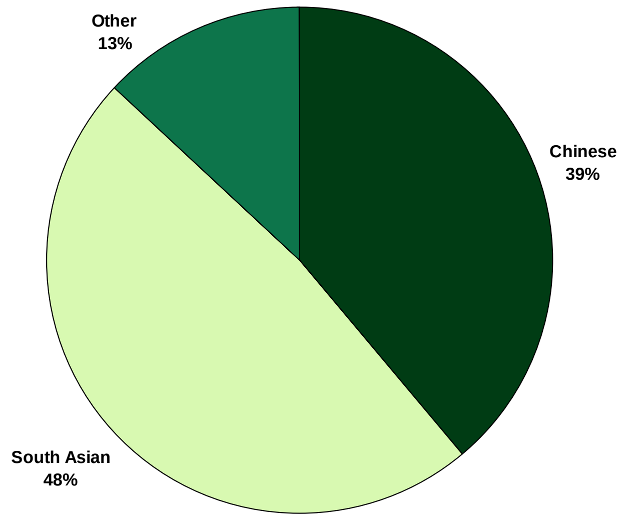
- In order to qualify for this study the respondent needed to be Ontario residents, of South Asian or Chinese origin, having lived in Canada for 10 or fewer years. Respondents must also have sole or joint responsibility for shopping and have purchased apples, pears, grapes, peaches, nectarines or plums during the past 4 weeks.

Data Analysis

- A key methodological consideration for this research was to be able to directly compare results from fruit consumer research conducted during Winter 2009 among the general population. Throughout this report comparisons are noted where applicable.
- As the Winter 2009 study also included a Latent Class Segmentation exercise, an algorithm was created to conduct the same segmentation among ethnic grocery shoppers.

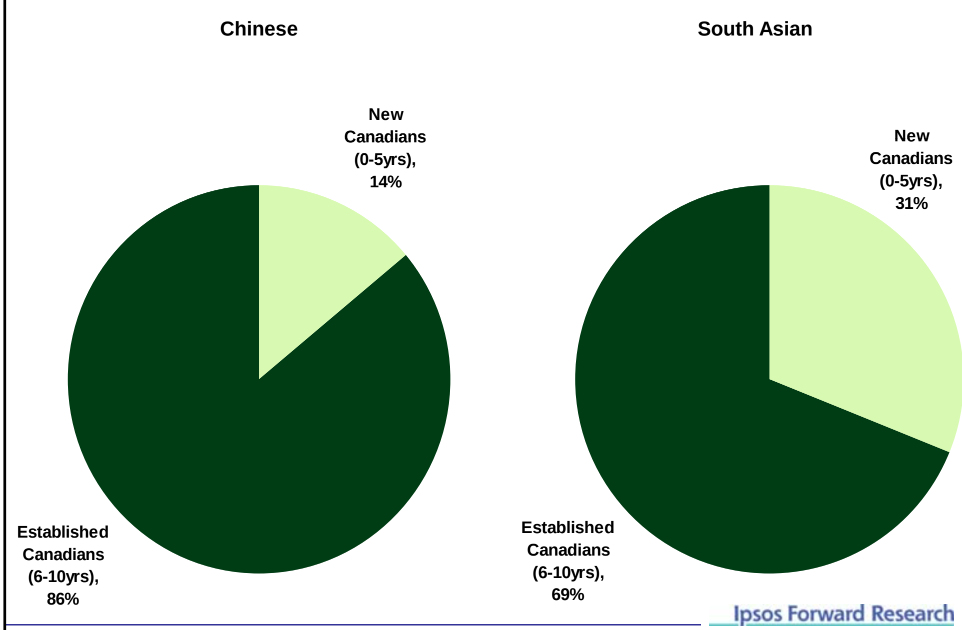
Ethnicity

All Respondents



Time Spent in Canada

All Respondents



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Executive Summary

September 2009

Nobody's Unpredictable

Executive Summary

Overall Grocery Shopping Behaviour

- The average ethnic grocery shopper visits a food retail location between 8 and 9 times per month (not including urgent shopping trips). This is slightly higher than that measured for the general population which visits a food retail location 7 to 8 times per month.
- When asked to identify the food retail location shopped most often, ethnic grocery shoppers were most likely to mention discount chains (58% very/somewhat often) followed by ethnic grocery stores (42%) and large chain grocery stores (37%). This is quite different than among the general population where large grocery chains lead all other store types for share of regular shoppers (53% very/somewhat often) and ethnic grocery stores are a niche market (4% very/somewhat often).
- Ethnic grocery shoppers spend an average of $407 monthly on food-related groceries, a level approximately 6% lower than that among the general population ($434). As time spent in Canada increases, so does average grocery spend with "New Canadians" (1-5 years) spending an average of $371 and "Established Canadians" (6-10 years) spending an average of $418.

Executive Summary

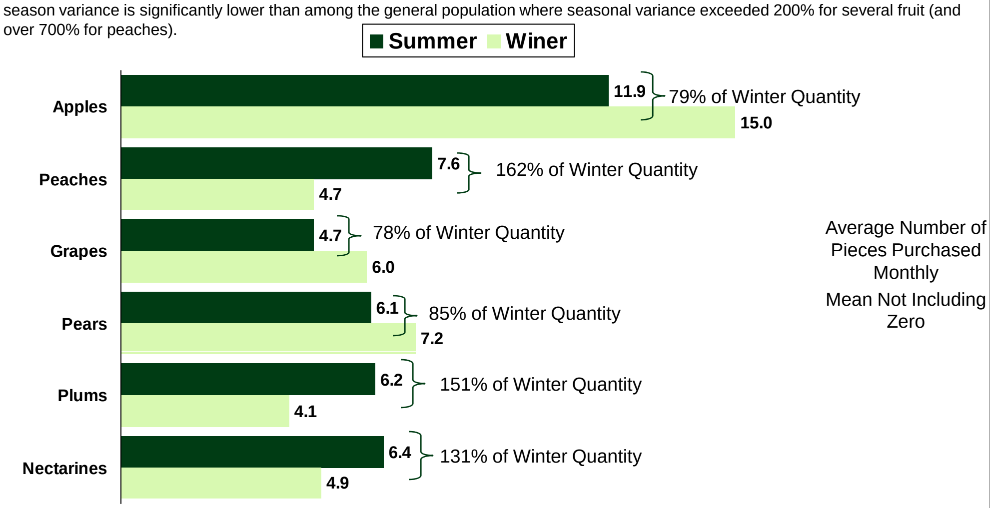
Fruit Shopping Behaviour

- An analysis of fruit purchase frequency illustrates that ethnic grocery shoppers are routine purchasers of a wide variety of fruit. Apples (95%), Bananas (95%), Grapes (93%) and Citrus (92%) are nearly universally purchased often/sometimes during a typical month. The majority of ethnic grocery shoppers often/sometimes purchase plums (63%), nectarines (67%) and/or peaches (74%).
- Ethnic grocery shoppers tend to purchase their fruit where they do the majority of their shopping with discount grocery stores being the most frequently shopped fruit retail location by a significant margin.
  - Chinese shoppers are far more likely to indicate they routinely purchase fruit at an ethnic grocery store than South Asian Shoppers.
- Total average monthly spend on fruit indicates that ethnic grocery shoppers are a core fruit-consuming segment. On average ethnic grocery shoppers spend $101.70 on fruit during a given month, a level approximately 40% higher than that among the general population ($72.60).

Executive Summary

Seasonal Purchase Behaviour:

The chart below illustrates the average number of pieces or clusters purchased by consumers in winter and summer months. Although some strong seasonality does exist among ethnic grocery shoppers (peaches, plums, nectarines consumption increases in summer), the season variance is significantly lower than among the general population where seasonal variance exceeded 200% for several fruit (and over 700% for peaches).



Q19. Thinking back over the past 4 weeks (summer months), approx how many of each fruit type have you purchased for your household? Q20. And thinking about a typical Jan/Feb, when ON fruit is typically not in season, approx how many of each fruit type would you purchase for your household in a typical month. Base: varies by fruit- fruits where respondent said at least rarely in Q8.

Executive Summary

Attitudes Relating to Ontario-produced Fruit

- Awareness of specific fruit produced on Ontario farms and orchards ranges considerably with nearly universal awareness for apples (90% aware) to less than half for nectarines:
  - 90% of ethnic shoppers are aware apples are produced in Ontario
  - 64% of ethnic shoppers are aware peaches are produced in Ontario
  - 56% of ethnic shoppers are aware grapes are produced in Ontario
  - 52% of ethnic shoppers are aware pears are produced in Ontario
  - 45% of ethnic shoppers are aware plums are produced in Ontario
  - 40% of ethnic shoppers are aware nectarines are produced in Ontario
- Despite, in some cases, relatively low awareness of the availability of Ontario fruit options, the majority (70%) indicate it is easy to identify Ontario fruit while shopping.
- Relative to the general population, however, ethnic grocery shoppers are far less likely to actively look for province/country of origin while shopping:
  - Apples – 39% of ethnic grocery shoppers always/often look (64% among general population)
  - Peaches – 31% of ethnic grocery shoppers always/often look (57% among general population)
  - Grapes – 27% of ethnic grocery shoppers always/often look (52% among general population)
  - Pears – 26% of ethnic grocery shoppers always/often look (51% among general population)
  - Nectarines – 27% of ethnic grocery shoppers always/often look (47% among general population)
  - Plums – 26% of ethnic grocery shoppers always/often look (48% among general population)

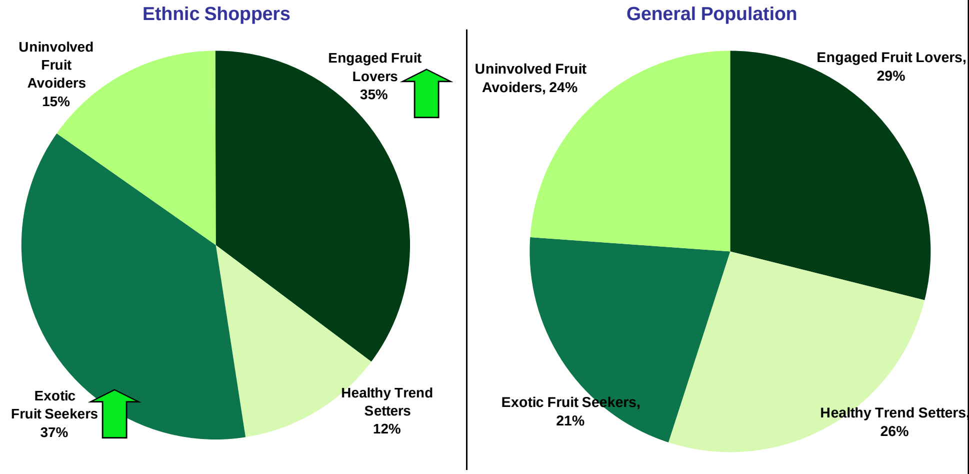
Executive Summary

Attitudes Relating to Ontario-produce Fruit

- Ethnic grocery shoppers are also significantly less likely to identify Ontario/Canada-produced fruit as offering the highest quality:
  - Apples – 54% identify Ontario/Canada-produced as highest quality (67% among general population)
  - Peaches – 47% identify Ontario/Canada-produced as highest quality (62% among general population)
  - Grapes – 40% identify Ontario/Canada-produced as highest quality (67% among general population)
  - Nectarines – 35% identify Ontario/Canada-produced as highest quality (57% among general population)
  - Pears – 37% identify Ontario/Canada-produced as highest quality (68% among general population)
  - Plums – 36% identify Ontario/Canada-produced as highest quality (64% among general population)
- Among those who have some preference for Ontario/Canada-produced fruit, the motivations for doing so are relatively consistent with the general population, with one exception: support for local economy/farmers is less likely to be considered an important motivation.
  - Fresher Fruit – 66% select as Most/2nd Most Important (60% among general population)
  - Better Tasting – 43% select as Most/2nd Most Important (41% among general population)
  - Higher Food Safety Standards – 39% select as Most/2nd Most Important (34% among general population)
  - Support Local Farmers/Economy – 21% select as Most/2nd Most Important (44% among general population)
  - Better for Enviro. – 15% select as Most/2nd Most Important (14% among general population)
  - After Purchase Shelf Life – 15% select as Most/2nd Most Important (8% among general population)

Executive Summary

An analysis of the segmentation results shows that ethnic grocery shoppers index much higher for “Engaged Fruit Lovers” and “Exotic Fruit Seekers”, the two highest volume fruit consuming segments in the Canadian population. In fact, 72% of ethnic grocery shoppers are classified in these two segments.



Executive Summary

	Engaged Fruit Lovers n=174	Healthy Trend Setters n=58	Exotic Fruit Seekers n=183	Uninvolved Fruit Avoiders n=76
Involvement With Fruit	· Very high involvement with fruit. · Pro-Ontario and supportive of local producers.	· Average involvement with fruit. · Pro-Ontario and supportive of local producers.	· Most involved with diverse spectrum of fruit, especially exotics.	· Very uninvolved with fruit.
Volume	· High volume of fruit purchases. · High expenditure on food overall and second highest on fruit. · High volume of fruit purchases during winter months.	· Average volume of Apples, less for other fruits. · Average expenditure on food overall and fruit. · Much higher purchases of peaches in summer months.	· High volume of variety of fruits but less grapes. · High expenditure on food overall and highest on fruit. · Seasons do not have big impact on fruit purchases.	· Average volume of apples, but very low on all others. · Lowest expenditure on food overall including fruit. · Seasons do not impact fruit purchases.
Attributes Associated with Ontario Fruit	· Freshness, best taste, consistent quality, and texture.	· Freshness, best taste, consistent quality, best texture, best appearance, and value for money.	· Least likely to associate “highest quality fruits” with Ontario. · Unlikely to associate positive fruit attributes with Ontario-produced fruit.	· Unlikely to associate positive fruit attributes with Ontario fruit.
Shopping	· Highly engaged and enjoys shopping for fruit.	· Low engagement but price is not a barrier.	· Average level of engagement towards grocery shopping.	· Unengaged shopper.
Food Lifestyle Choices	· Fruit plays a very active role in diet.	· Actively avoids processed foods and prefers organic.	· Actively avoids processed foods and reads literature about healthy eating.	· Fruit is not an active part of lifestyle.
Purchase From	· Majority of fresh whole-fruit purchased from large and discount grocery stores.	· Majority of fresh whole-fruit purchased from large chains and least likely from discount grocery stores.	· Discount and large chain food retailers are where most consumers purchase fruit.	· Fresh whole-fruit is purchased most often from discount and large chain grocery stores.
Personal Situation	· More women than men. · Middle age and more likely to be retired.	· More women than men. · Middle age and more likely to be retired.	· More women than men. · Least likely to be born in Canada. · Most likely to be employed full-time.	· More men than women. · Likely to be born in Canada. · Likely to be employed full-time · Most likely to be in a domestic partnership.

Executive Summary

Persuasion Staircase

***Engaged Fruit Lovers*: ** This segment has the highest engagement with fruit, purchases high volumes and variety regardless of season and has a strong belief system as it relates to Ontario fruit. Maintaining the needs of this segment should be a top priority for Ontario fruit marketers.

Recognizing and Selecting Ontario Quality

***Exotic Fruit Seekers*: ** This segment is highly engaged with fruit, however, does not recognize Ontario quality. Better understanding the needs of this segment should be the top priority for Ontario fruit marketers.

Purchasing a Variety of Fruit Regardless of Season

***Healthy Trend Setters*: ** This segment is highly engaged with fruit and has a strong, positive belief system toward Ontario fruit. Encouraging more variety in fruit consumption during both winter and summer should be a secondary priority for fruit marketers.

Involvement in Fruit Buying

***Uninvolved Fruit Avoiders*: ** At this time this segment is a low priority for Ontario fruit marketers due to low consumption and engagement in the category.

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Conclusions and Recommendations

Conclusions and Recommendations

- The ethnic grocery shopper represents a significant immediate and critical long-term opportunity for the Ontario fruit producer:
  - Despite lower average monthly grocery spend than the general population, ethnic grocery shoppers report spending approximately 40% more on fresh whole fruit. Further, this fruit spend appears to be broadly distributed across a wide range of domestic and imported fruit.
  - Segmentation reveals that nearly three quarters of ethnic grocery shoppers are "Engaged Fruit Lovers" or "Exotic Fruit Seekers", the two most valuable segments to fruit marketers. These segments have achieved high involvement in fruit purchasing and purchase a variety of fruit regardless of season. The only stage of the persuasion staircase potentially left unfulfilled is to recognize and select Ontario quality.
  - The literature review conducted on behalf of Vineland indicates the number of ethnic shoppers is expanding at a rapid rate: *"Depending on the projection scenario used, Canada's visible minority population could number between 6.3 million and 8.5 million in 2017; that is, it could be anywhere from 56% to 111% larger than in 2001"*

Recommendation: Ethnic grocery shoppers should be a top priority segment for the Ontario fruit industry. Better serving the needs of the ethnic grocery shopper could be a long-term competitive advantage.

Conclusions and Recommendations

- Despite being a highly desirable audience in terms of consumption, ethnic grocery shoppers pose a significant challenge to Ontario fruit marketers:
  - Shopping location suggests a large proportion of ethnic grocery shoppers are motivated by low price. It may be difficult to establish loyalty if price is the primary motivator.
  - A sizeable proportion of fruit shopping, especially for Chinese Canadians, is occurring at ethnic grocery stores. This means multiple points of contact for the industry with varying levels of size and sophistication.
  - Ethnic grocery shoppers demonstrate significantly less seasonality in purchase volume. The lack of a summer "surge" in demand is incongruent with the Ontario growing season.
  - Ethnic grocery shoppers are less likely to "actively look" for country of origin. Additionally, a sizeable proportion of ethnic shoppers are simply unaware of Ontario production for all fruit except apples.
  - Ethnic grocery shoppers are less likely to perceive Ontario as "the best" source of high quality fruit.
  - For ethnic grocery shoppers, the preference for Ontario fruit is linked directly to functional factors such as quality, freshness and taste. "Supporting Local" is not a strong motivator for preference.

Recommendation: While the ethnic market provides a broad array of challenges and barriers to entry, the rapidly expanding size of this market is likely to large to be ignored by Ontario fruit marketers. Ontario fruit marketers should act now and develop an action plan to address each of the issues listed above. While some may be relatively easy to address, others (such as looking for and recognizing Ontario quality) will require a long-term sustained effort.

Detailed Findings

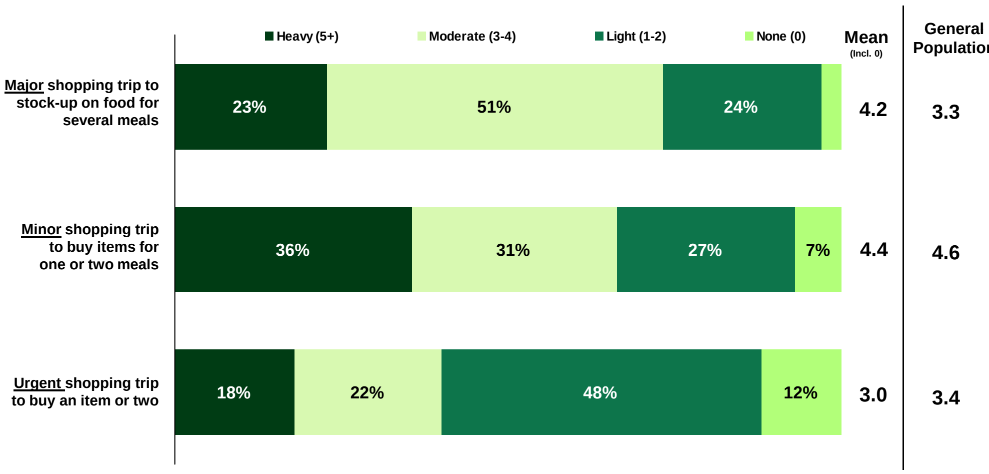
General Shopping Behaviour

Number of Shopping Trips in a Typical Month by Type

All Respondents

The average ethnic grocery shoppers visits a food retail location 8.6 times per month, not including urgent shopping trips, a level slightly higher than among the general population.

- Virtually all respondents (97%) indicate they conduct at least one major shopping trip in a typical month. Virtually no differences were found in number of shopping trips by ethnicity or time spent in Canada.



Mentions less than 9% are not labelled

Q1. How many major/ minor/ urgent shopping trips do you make for groceries in a typical month?
Base: All Respondents n=491

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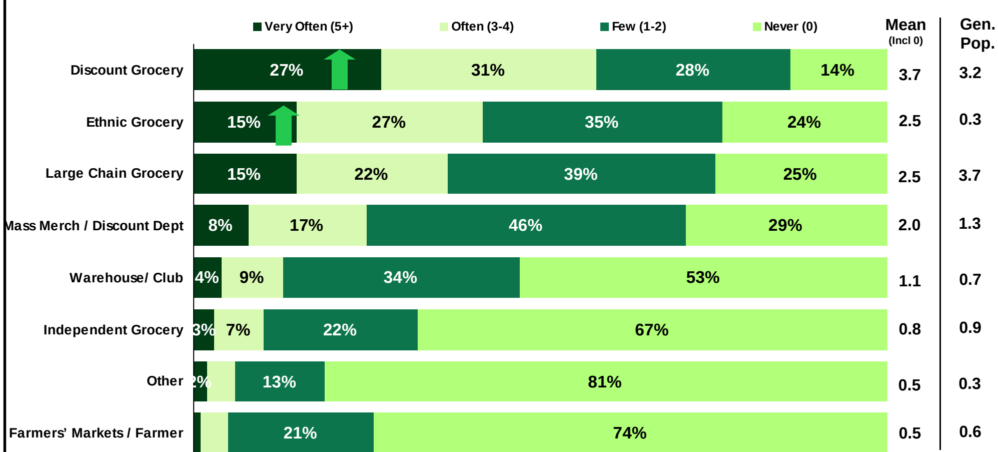
Vineland New Canadian Segmentation

Frequency of Shopping in Typical Month at Food Retail Locations

All Respondents

Discount grocery chains stand out as the leading food shopping location for ethnic Canadians with 58% indicating they shop at such stores 3+ times monthly (versus 53% among general population).

Not surprisingly, ethnic grocery stores are also far more likely to be shopped on a regular basis (42% versus 5% among general population); in fact, ethnic grocery stores are shopped just as often as large chain brands.



Mentions less than 5% are not labelled

Q2. Approximately how many times in a typical month do you shop for groceries at each of the following types of food retail locations? Base: All respondents n=491

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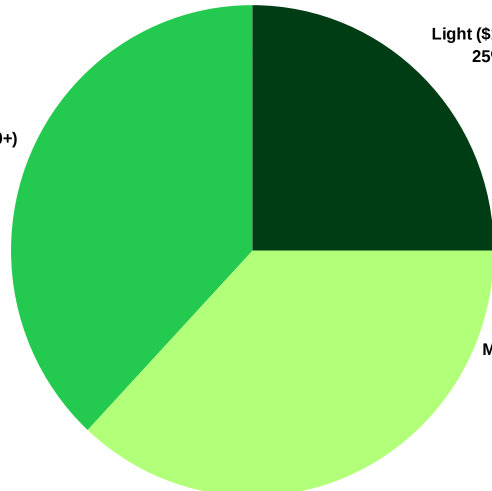
Vineland New Canadian Segmentation

Typical Monthly Amount Spent on Food-Related Groceries

All Respondents

Ethnic grocery shoppers spend an average of $407 monthly on food-related groceries, a level 6% lower than that among the general population ($434). Average total grocery spend increases considerably as time in Canada increases with "Established Canadians" spending an average of 13% more monthly.

Mean
Total: $407
1-5 Years: $371
6-10 Years: $418



Q4. In a typical month, how much does your household spend on food-related groceries?
Base: All respondents n=491

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Fruit Shopping Behaviour

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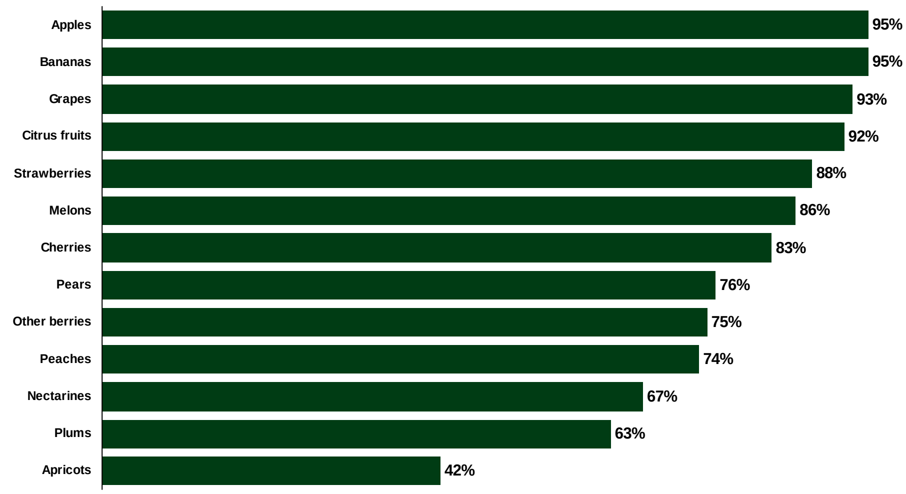
Frequency of Purchasing Specific Types of Fruit

All Respondents – Often/ Sometimes Summary

The chart below depicts incidence of often/sometimes purchasing each of the fruit listed:

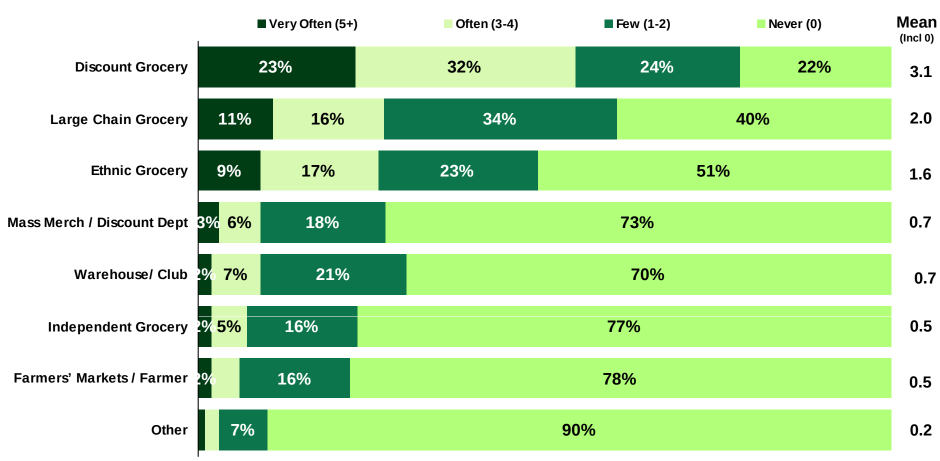


SC3. Listed below are a number of specific types of whole-fruit. For each type, please indicate whether you often, sometimes, rarely or never purchase that type of fruit as part of your regular grocery shopping.
Base: All respondents n=1139 (Often/ Sometimes Summary – Top 2 Box)

Frequency of Fruit Purchasing in a Typical Month at Food Retail Locations

All Respondents

As with grocery shopping in general, ethnic grocery shoppers are most likely to regularly conduct their fruit shopping at discount grocery chains.



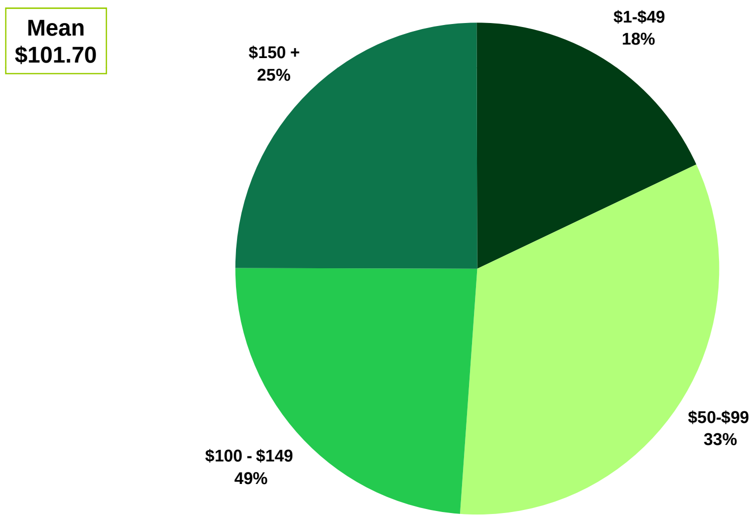
Mentions less than 5% are not labelled

Q3. Approximately how many times in a typical month do you purchase fresh whole fruit at each of the following types of food retail locations? Base: All respondents n=491

Typical Monthly Amount Spent on Fresh Whole-Fruit

All Respondents

Despite having a lower overall grocery spend than the general population, ethnic grocery shoppers report spending approximately 40% more on fresh whole fruit in a typical month ($101.70 versus 72.60). This is particularly true among those of south asian origin who spend an average of $107 monthly on fresh whole fruit.



Q7. And in a typical month, how much would you estimate that your household spends on fresh whole-fruit? Base: All respondents n=491

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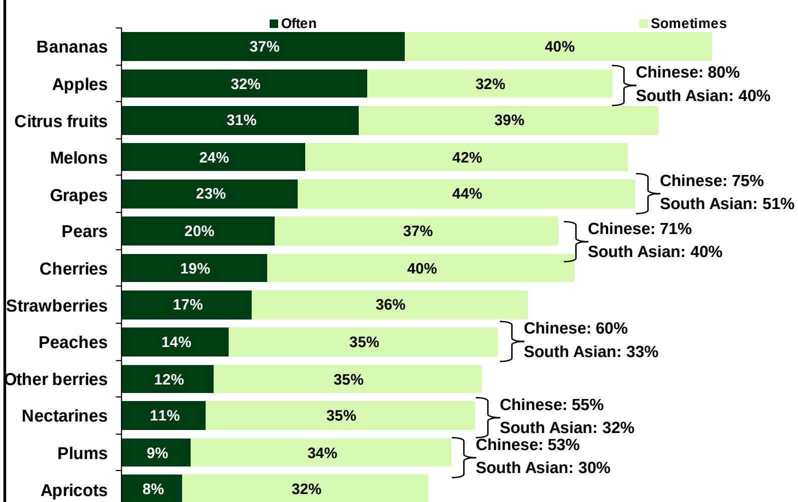
Frequency of Fruit Purchase from Ethnic Grocery Stores

All Respondents

Fruit purchase behaviour for ethnic grocery stores follows normal market penetration levels by fruit type: Bananas, Apples and citrus are most often purchased often/sometimes. Chinese Canadians are more likely to purchase all core fruit Ontario fruit types at an ethnic grocery store.



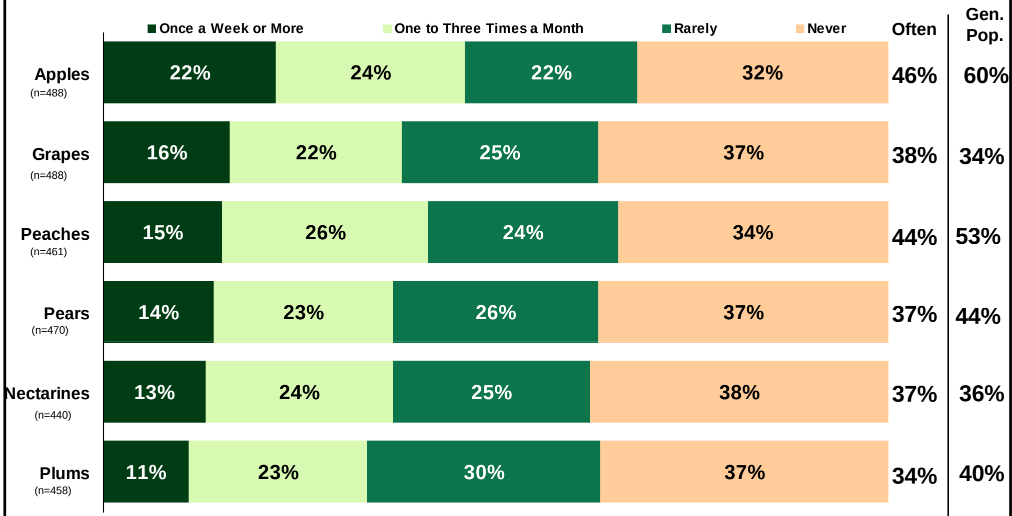
Q9. How often do you purchase any type of the following types of fruit at an ethnic grocery store? Base Size Varies

Ipsos Forward Research

Frequency of Fruit Purchase from a Farmer/ Farmer's Market/Community Share Program (During Summer Months)

All Respondents

Although the proportion of ethnic grocery shoppers who often purchase fruit at a farmer's market or via a community share program is relatively consistent with the general population, the proportion who never do so is much higher among ethnic shoppers.



Q23. During the a typical August or September, when local Ontario fruit is in-season, how often would you say that you purchase the fruit listed below from a farmer, farmer's market or home-delivered produce box (from a farmer or community share program)? Base: Varies by fruit- fruits where respondent said at least rarely in SC3

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Vineland New Canadian Segmentation

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Fruit Purchase Volume and Seasonality

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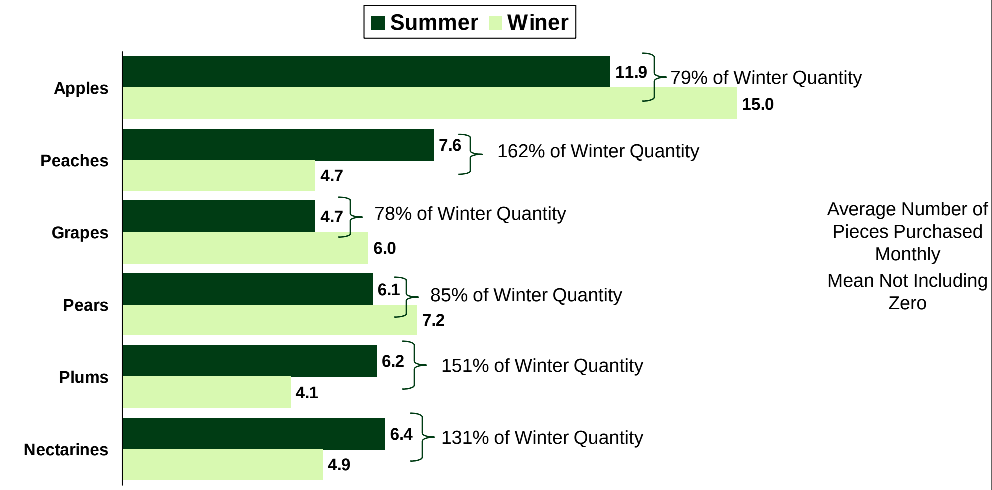
Seasonality in Fruit Purchase Volume: Winter versus Summer Months

All Respondents

The chart below illustrates the average number of pieces or clusters purchased by consumers in winter and summer months. Although some strong seasonality does exist among ethnic grocery shoppers (peaches, plums, nectarines consumption increases in summer), the season variance is significantly lower than among the general population where seasonal variance exceeded 200% for several fruit (and over 700% for peaches).



Q19. Thinking back over the past 4 weeks (summer months), approx how many of each fruit type have you purchased for your household? Q20. And thinking about a typical Jan/Feb, when ON fruit is typically not in season, approx how many of each fruit type would you purchase for your household in a typical month. Base: varies by fruit- fruits where respondent said at least rarely in Q8.

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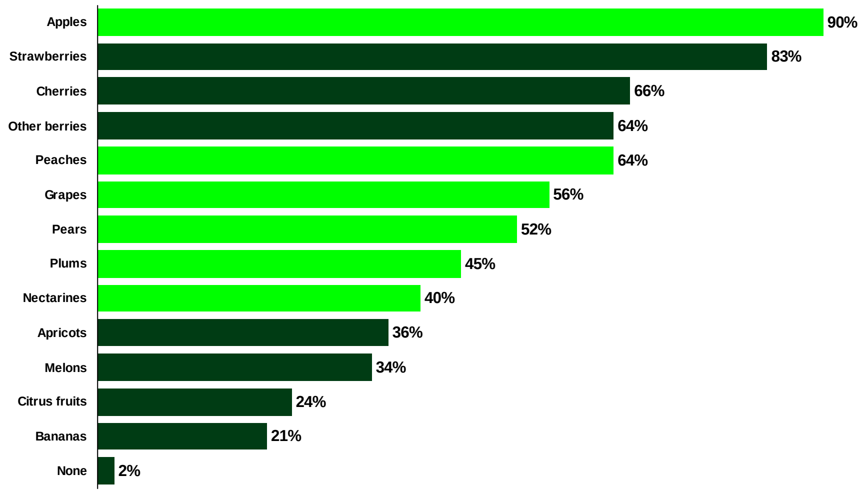
Country/Region of Origin: Attitudes and Behaviour

Fruits grown on Ontario Farms and Orchards.

All Respondents

Awareness of specific types of fruit grown in Ontario ranges considerably by fruit type and is highest for apples, strawberries, cherries and peaches.

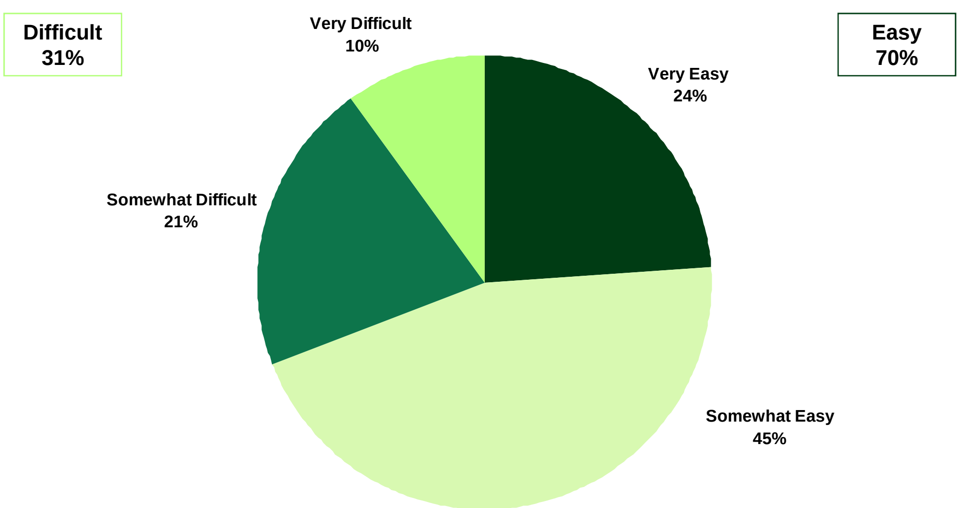


Q12. To the best of your knowledge, which of the following fruit are produced on Ontario farms and/or orchards?
Base: All Respondents: 491

Ease in Identifying Ontario-Produced Fruit Options

All Respondents

As with the general population study, the vast majority of ethnic grocery shoppers indicate it is either very easy or somewhat easy to identify Ontario-produced fruit options while shopping.

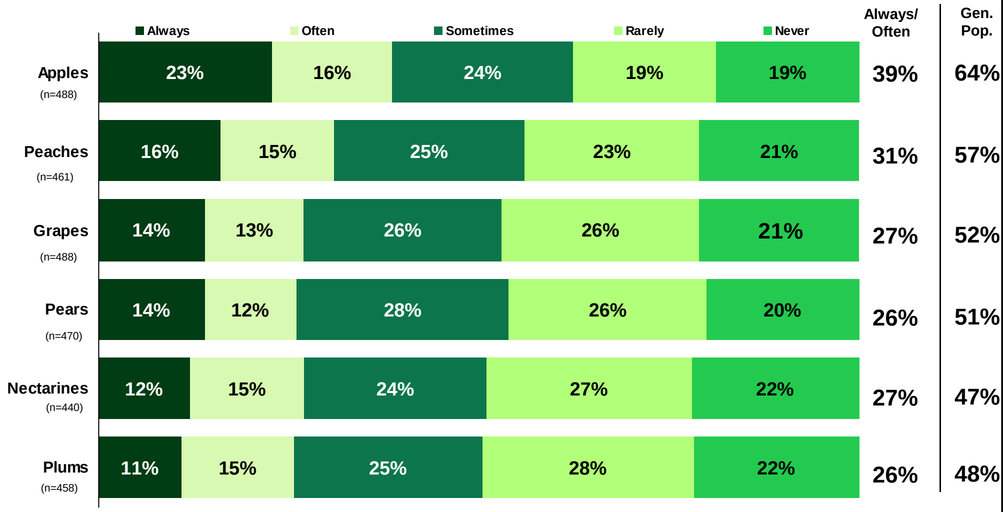


Q17. Overall, how easy or difficult do you find it to quickly identify Ontario-produced fruit options where you do most of your shopping? Base: All respondents n=491

Actively look for Province or Country of Origin

All Respondents

Although a sizeable proportion of ethnic grocery shoppers indicate they always or often look for province or country of origin while shopping for fruit, the incidence of doing so is far lower than among the general population. For all fruit types, shoppers of South Asian origin or those who have lived in Canada less than 5 years were more likely to actively look for country of origin.



Q13 Please select the statement that best describes the degree to which you actively look for the province or country of origin when shopping for each type of fruit listed. Base: All Respondents: 491

Mentions less than 8% are not labelled

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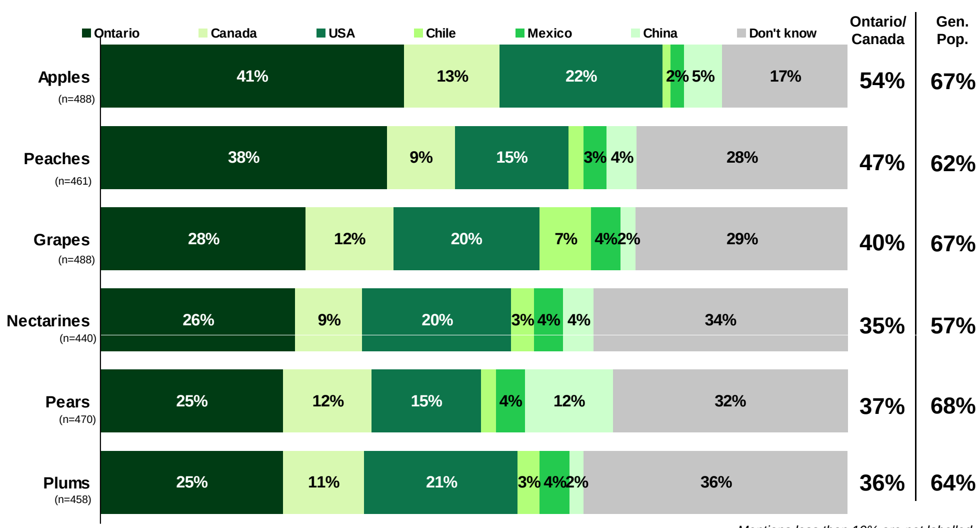
Vineland New Canadian Segmentation

Origin of Fruit with "Highest Quality"

All Respondents

When asked for sources of fruit with "highest quality", ethnic grocery shoppers were far less likely to select Ontario/Canada than the general population. Ethnic grocery shoppers are more likely to be unsure of source of "highest quality".



Q14. For each type of fruit listed in the table below please identify the region or country you most strongly associate with 'the highest quality fruit'. Base: Varies by fruit- fruits where respondent said at least rarely in SC3.

Mentions less than 10% are not labelled

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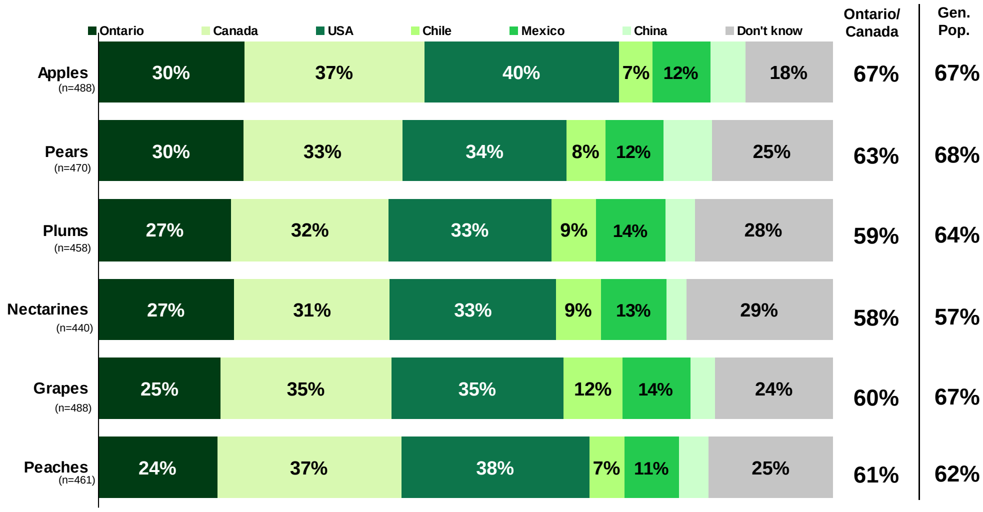
Vineland New Canadian Segmentation

Origin of Fruit with "Acceptable Quality"
(Not Including Region with Highest Quality)
All Respondents

As with the general population, Ontario, Canada and the United States are the three sources of fruit most likely to be considered "acceptable" by ethnic grocery shoppers.



Mentions less than 7% are not labelled

Q15. For each type of fruit listed in the table below please identify the regions or countries that you consider to offer 'acceptable quality'. Please select all that apply for each fruit. ' Base: Fruit(s) where respondent said at least rarely in SC3.

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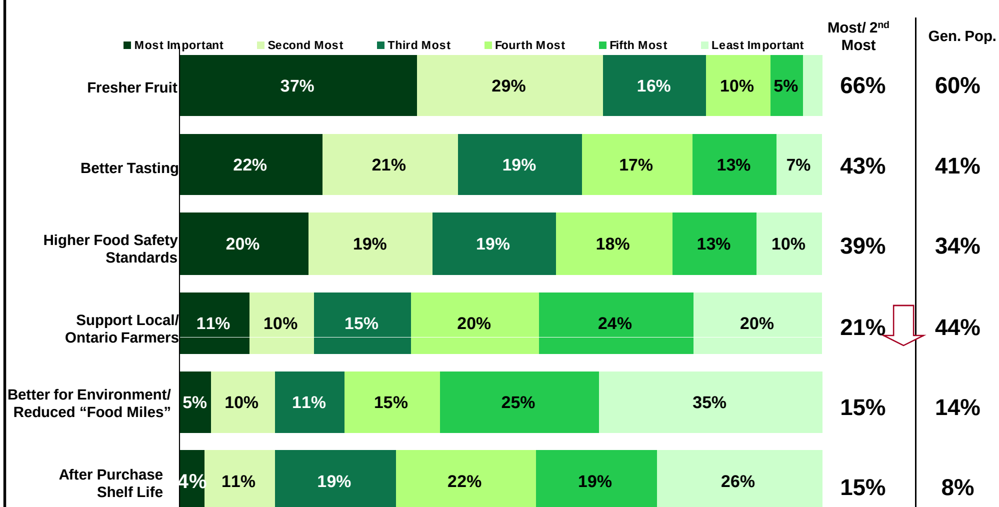
Vineland New Canadian Segmentation

Importance of Reasons for Purchasing Ontario Fruit
All Respondents

Motivations for purchasing Ontario-produced fruit are relatively consistent with those of the general population with one exception: ethnic grocery shoppers are less likely to select support local economy/Ontario farmers as a first or second most important reason.



Mentions less than 5% are not labelled

Q16. Listed below are several potential reasons for purchasing local Ontario fruit. Please rank these in order of importance to you personally from 'Most Important' to 'Least Important'. Base: All respondents: 491

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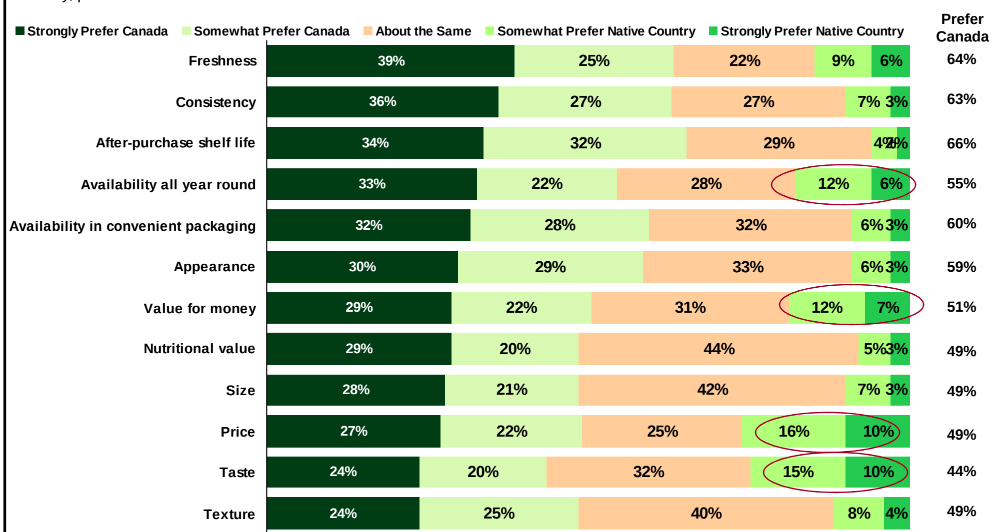
Vineland New Canadian Segmentation

Fruit Attributes Preferences between Canada and Native Country

All Respondents

When asked to compare fruit available in Canada with fruit available in their native country, ethnic grocery shoppers were most likely to rate Canadian fruit higher on all attributes. Relative strengths of fruit available in native country are: year-round availability, value for money, price and taste.



Q24. For this question we would like for you to indicate the degree to which you prefer fruit available in your native country versus fruit available in Canada. Base: All respondents n=491

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Vineland New Canadian Segmentation

GEORGE MORRIS CENTRE

Segmentation

September 2009

Nobody's Unpredictable

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GEORGE MORRIS CENTRE

Segmentation Overview

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Segmentation Overview

Segmentation Process

At Ipsos Forward, our in-house marketing sciences professionals assisted with the development of the final segmentation solution.

The process of developing the final segmentation solution included in this research included factor analysis as well as the development of a number of segmentation models.

Respondents were classified into four clusters or groups taking into consideration the following:

- **Respondents within each segment have similar attitudes and behaviour (often similar socio-demographic and psychographic profiles),**
- **A key aspect of our approach to segmentation is searching for meaningful differentiation across the segments; each segment needs to be a unique and credible marketing entity,**
- **In the case of this research, variances in fruit consumption across segments must be consistent with the client's "gut feel".**

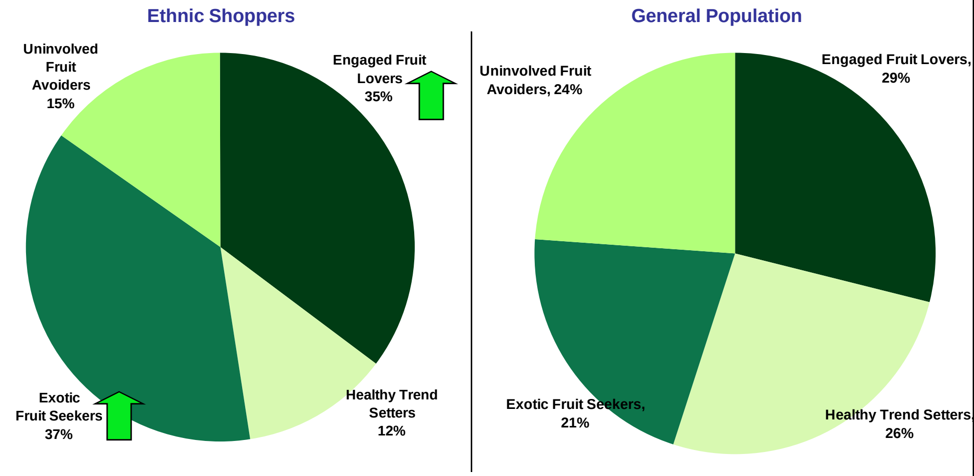
The questionnaire was designed to allow for segmentation to be run on attitudinal, behavioural and lifestyle variables.

Based on the segmentation solution developed for the general population study, we were able to create an algorithm to replicate the segmentation process for the ethnic study.

Segment Sizes

All Respondents

An analysis of the segmentation results shows that ethnic grocery shoppers index much higher for "Engaged Fruit Lovers" and "Exotic Fruit Seekers", the two highest volume fruit consuming segments in the Canadian population. In fact, 72% of ethnic grocery shoppers are classified in these two segments.



Distinguishing Segment Factors

	Engaged Fruit Lovers n=174	Healthy Trend Setters n=58	Exotic Fruit Seekers n=183	Uninvolved Fruit Avoiders n=76
Involvement With Fruit	· Very high involvement with fruit. · Pro-Ontario and supportive of local producers.	· Average involvement with fruit. · Pro-Ontario and supportive of local producers.	· Most involved with diverse spectrum of fruit, especially exotics.	· Very uninvolved with fruit.
Volume	· High volume of fruit purchases. · High expenditure on food overall and second highest on fruit. · High volume of fruit purchases during winter months.	· Average volume of Apples, less for other fruits. · Average expenditure on food overall and fruit. · Much higher purchases of peaches in summer months.	· High volume of variety of fruits but less grapes. · High expenditure on food overall and highest on fruit. · Seasons do not have big impact on fruit purchases.	· Average volume of apples, but very low on all others. · Lowest expenditure on food overall including fruit. · Seasons do not impact fruit purchases.
Attributes Associated with Ontario Fruit	· Freshness, best taste, consistent quality, and texture.	· Freshness, best taste, consistent quality, best texture, best appearance, and value for money.	· Least likely to associate "highest quality fruits" with Ontario. · Unlikely to associate positive fruit attributes with Ontario-produced fruit.	· Unlikely to associate positive fruit attributes with Ontario fruit.
Shopping	· Highly engaged and enjoys shopping for fruit.	· Low engagement but price is not a barrier.	· Average level of engagement towards grocery shopping.	· Unengaged shopper.
Food Lifestyle Choices	· Fruit plays a very active role in diet.	· Actively avoids processed foods and prefers organic.	· Actively avoids processed foods and reads literature about healthy eating.	· Fruit is not an active part of lifestyle.
Purchase From	· Majority of fresh whole-fruit purchased from large and discount grocery stores.	· Majority of fresh whole-fruit purchased from large chains and least likely from discount grocery stores.	· Discount and large chain food retailers are where most consumers purchase fruit.	· Fresh whole-fruit is purchased most often from discount and large chain grocery stores.
Personal Situation	· More women than men. · Middle age and more likely to be retired.	· More women than men. · Middle age and more likely to be retired.	· More women than men. · Least likely to be born in Canada. · Most likely to be employed full-time.	· More men than women. · Likely to be born in Canada. · Likely to be employed full-time · Most likely to be in a domestic partnership.

Segmentation Persuasion Staircase

September 2009

Nobody's Unpredictable

Segmentation Persuasion Staircase

Engaged Fruit Lovers**:** This segment has the highest engagement with fruit, purchases high volumes and variety regardless of season and has a strong belief system as it relates to Ontario fruit. Maintaining the needs of this segment should be a top priority for Ontario fruit marketers.

Recognizing and Selecting Ontario Quality

Exotic Fruit Seekers**:** This segment is highly engaged with fruit, however, does not recognize Ontario quality. Better understanding the needs of this segment should be the top priority for Ontario fruit marketers.

Purchasing a Variety of Fruit Regardless of Season

Healthy Trend Setters**:** This segment is highly engaged with fruit and has a strong, positive belief system toward Ontario fruit. Encouraging more variety in fruit consumption during both winter and summer should be a secondary priority for fruit marketers.

Involvement in Fruit Buying

Uninvolved Fruit Avoiders**:** At this time this segment is a low priority for Ontario fruit marketers due to low consumption and engagement in the category.

Appendix

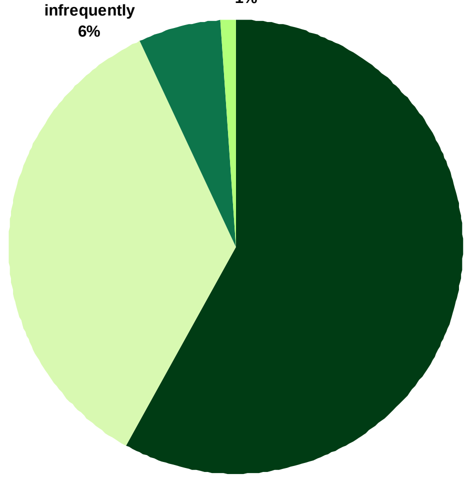
September 2009

Nobody's Unpredictable

Role of Fresh Fruit in Diet

All Respondents

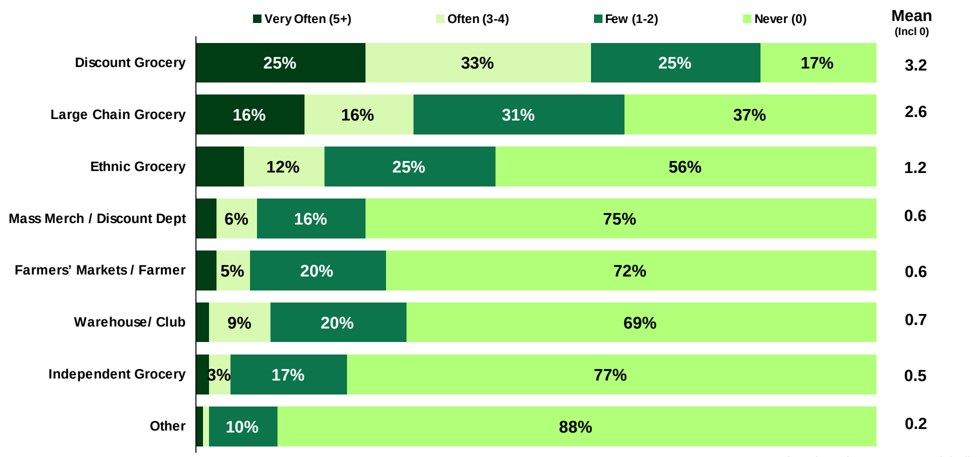
Over half of ethnic grocery shoppers indicate that fruit is part of their daily diet, a level only slightly higher than among the general population (54%).



Q18. Which of the following statements best describes the role that whole-fruit plays in your diet? For me, fresh whole-fruit is... Base: All respondents n=491

Frequency of Shopping in Typical Month at Food Retail Locations

Engaged Fruit Lovers



Mentions less than 5% are not labelled

Q3. Approximately how many times in a typical month do you shop for groceries at each of the following types of food retail locations? Base: Engaged Fruit Lovers n=174

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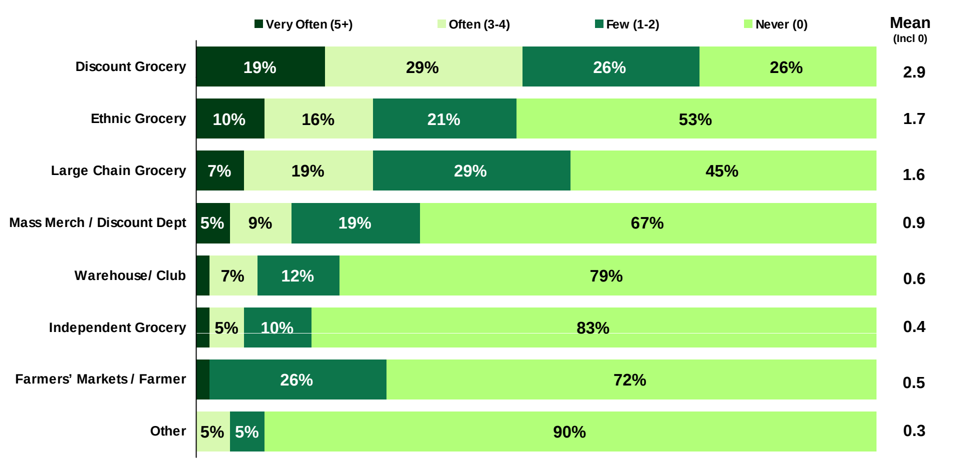
Frequency of Shopping in Typical Month at Food Retail Locations

Healthy Trend Setters



Mentions less than 5% are not labelled

Q3. Approximately how many times in a typical month do you shop for groceries at each of the following types of food retail locations? Base: Healthy Trend Setters n=58

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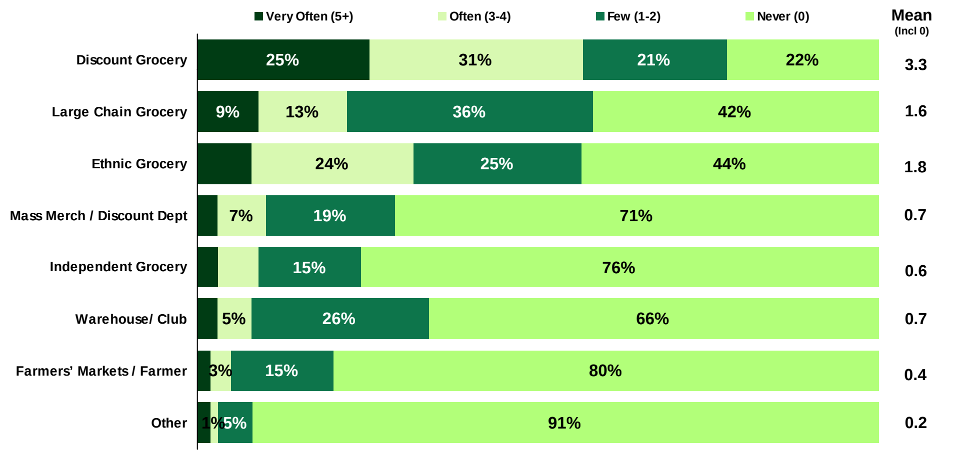
Vineland New Canadian Segmentation

Frequency of Shopping in Typical Month at Food Retail Locations

Exotic Fruit Seekers

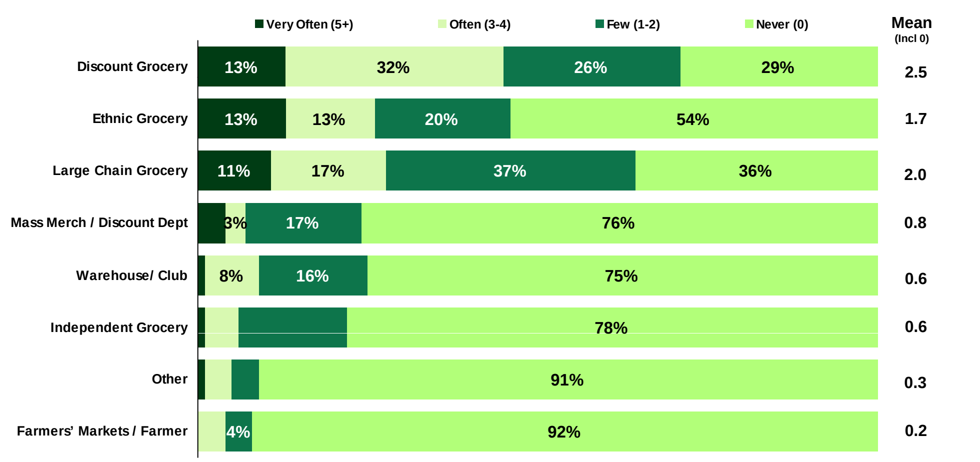


Mentions less than 5% are not labelled

Q3. Approximately how many times in a typical month do you shop for groceries at each of the following types of food retail locations? Base: Exotic Fruit Seekers n=183

Frequency of Shopping in Typical Month at Food Retail Locations

Uninvolved Fruit Avoiders



Mentions less than 5% are not labelled

Q3. Approximately how many times in a typical month do you shop for groceries at each of the following types of food retail locations? Base: Uninvolved Fruit Avoiders n=76

For More Information Please Contact:

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