



# Ipsos Camelford Graham

**CONFIDENTIAL**

## **Project Vineland –Phase I/II/III Report– [0801691801]**

Prepared For: Vineland Research and Innovation Centre  
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Project Vineland – Phase I/II/III (04-08-478)



## 1.0 Introduction

## Background

- The Foodland Ontario brand is well-recognized by consumers, and many indicate a positive desire to 'buy Ontario', though this does not always translate into sales. As a result, a need was identified to more closely understand the purchasing process in order to develop a strategy to influence purchase behaviour
- To this end, Ipsos Camelford Graham was requested to conduct qualitative/ethnographic research as part of a larger quantitative study to provide insight to the Ontario Horticulture Sector with regards to apples, fresh grapes and tender fruit
- This document outlines the amalgamated findings of the three stages of qualitative/ethnographic study



## Objectives

- Objectives for this study/phase were agreed upon as follows:

### Understand the consumer purchasing process

- More specifically information objectives/questions include:
  - Consumers' behaviour as it relates to shopping for apples, fresh grapes and tender fruit
  - Primary decision factors that motivate the purchase in the retail environment. (e.g., the relative importance of price, 'locally grown,' presentation, 'brand', health benefits, the eating experience/keeping quality, close to ripe/ripe)
  - Role of branding and consumer perceptions related thereto - what does it all mean to the consumer and what is compelling / not compelling?
  - How does the consumer define "quality" – size, colour, flavour, juiciness, crunchiness, consistency, consistency of colour, price, origin label, shelf life, texture, size consistency if bulk-bagged, etc?
  - What visual cues does the consumer rely on – merchandising, packaging, colour, size, feel, blemishes, etc?
  - Identify who in the household eats the fruit and in what form; how do they use whatever they buy (loose pack, different varieties, bagged, different sizes of fruit).
  - Consumers' preference for various packaging formats: clamshell, poly bag, and loose pack.
  - Consumer selection (or not) of Ontario-grown fruit. Why do they choose / not choose at the point of purchase?
  - What consumers think of Ontario-grown product compared to competing products from other parts of the world.
  - Buying behaviour with other fruits grown in Ontario and whether consumers buy Ontario or not.
  - Consumers' perceptions and stated importance of the health benefits from eating fruit.
  - Consumers' perception of barriers to selling more fresh fruit grown in Ontario



## Methodology

- A series of 21 Ethnographic Walk-Thru Sessions were conducted as outlined below:

	Guelph	Toronto
Apples and Pears	3	4
Table Grapes and Pears	3	3
Peaches and Plums	4	4
<b>Total Sessions</b>	<b>10</b>	<b>11</b>

- Guelph location – Zehrs (located at Kortright and Edinburgh)
- Toronto location – Loblaws (located at St. Clair and Bathurst)
- Sessions were approximately 1 hour in length. A copy of the discussion guides is appended.
- Respondents were recruited to the following broad specifications:
  - Female heads of household, principal grocery shopper (or shared responsibility)
  - Mix of ages from 25-60
  - Mix of households with kids at home (mix of ages)
  - All respondents regularly buy and/or eat fruit including their specified types (e.g. apples and pears)





## Note on Interpretation

- This research is qualitative in nature. It is based on the opinions of 21 specially selected respondents, recruited to specific specifications, and the analysis of the moderator/ethnographer.
- Findings should be treated as directional in nature rather than definitive.



## 2.0 Conclusions





## Conclusions & Implications

- In season produce – including apples and pears – typically have heightened functional and emotional benefits for consumers. During season, there is a strong preference (or assumption) that all product in the store will be local.
  - There is an opportunity to do more to celebrate products during season, and to further flag/differentiate local product at this time versus non-local.
- Despite a reported preference for local produce there was little sense that this information is consistently confirmed and sought out as part of the in-store decision making process. At the conscious level, consumers seem much more driven to “their” variety based on personal tastes and household preferences.
  - Reactions when non-local product was selected (unknowingly or incorrectly) – i.e. frustration, embarrassment, etc. – suggest that there is more potential to increase the overall profile of local produce and its importance in terms of attitudes and decision making.
  - There is an opportunity to do more in store through POP and other communications to make origin more explicit, and to further raise its profile in decision making.



## Conclusions & Implications Cont'd

- Overall, brand and grade play a very minor role (if any) in directing consumer choice and decision making. Quality is assessed piece by piece, based on personal preferences/needs. In some cases, the variety itself (e.g. Macintosh, Spartan) acted as a surrogate for brand – making a promise of quality/experience based on their tastes.
  - While local played a role in determining quality based on expectations about closeness to the tree, travel time, etc., there is opportunity to increase its role in determining quality more consistently, and at a conscious level.
- The Foodland Ontario symbol acts as a positive signal of local origin when noticed, though several were unclear as to what Foodland Ontario actually represented as a brand (i.e. a government or industry/producers body?).
  - There is an opportunity to increase the profile of Foodland Ontario in store, to further elevate its role in the decision making process (as a navigation/selection cue).





## Conclusions & Implications Cont'd

- Overall, benefits of the Ontario peach basket are recognized. However, not all immediately link the basket to 'Ontario'. For some, the link with the basket itself is non-existent and relies purely on signage and labeling.
  - Given the generally appreciated positives of Ontario produce, there is opportunity to further strengthen and clarify the link to 'Ontario'
- In addition, some consumers bypass the Ontario peach basket given the size of the basket (too much!)
  - Some desire for a mid-size option or the ability to find Ontario peaches on the single serve rack



### 3.0 Detailed Findings



### 3.1 Fruit Overview

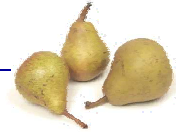
### Overview - Apples



<b>Origin (local)</b>	<ul style="list-style-type: none"> <li>- Awareness of Ontario as well as more regional varieties</li> <li>- Preference for local product for most, particularly when in season</li> </ul>
<b>Variety</b>	<ul style="list-style-type: none"> <li>- Highly subject to individual tastes re: texture, tartness, flavour (sometimes varies by member of household)</li> </ul>
<b>Quality</b>	<ul style="list-style-type: none"> <li>- Colour appropriate to variety (i.e. Green for Granny Smith, etc.)</li> <li>- Size appropriate to expectations for variety</li> <li>- Unblemished skin</li> <li>- Shine (for some)</li> </ul>
<b>Price and value</b>	<ul style="list-style-type: none"> <li>- Given wide selection of varieties, stronger potential for price / sales to impact final selection</li> </ul>
<b>Presentation/merchandising/POS</b>	<ul style="list-style-type: none"> <li>- Navigation by the fruit itself (identifying familiar varieties)</li> <li>- POS used for price/value information, and origin (for a few)</li> </ul>
<b>Packaging</b>	<ul style="list-style-type: none"> <li>- Single serve preferred (to allow for individual quality control)</li> <li>- Bagged acceptable for larger families/kids (with visual check of quality through bag)</li> </ul>



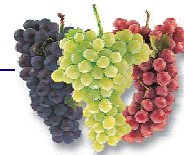
## Overview - Pears



<b>Local / origin</b>	<ul style="list-style-type: none"> <li>- Awareness of Ontario pear varieties, but perceived to be a limited (especially compared to standard selection)</li> <li>- Some preference for Ontario pears overall (for some, pear shopping happens primarily in season)</li> </ul>
<b>Variety</b>	<ul style="list-style-type: none"> <li>- Wide variety of pears and perceived differences between varieties → increased decision factors (e.g. use: cooking = Bosc, eating = Bartlett)</li> </ul>
<b>Quality</b>	<ul style="list-style-type: none"> <li>- Firm with some 'give'</li> <li>- Consistent colour</li> <li>- Relatively unblemished (albeit blemishes acceptable when used for cooking)</li> </ul>
<b>Price and value</b>	<ul style="list-style-type: none"> <li>- Given wide selection of varieties, stronger potential for price / sales to impact final selection</li> </ul>
<b>Presentation/merchandising/POS</b>	<ul style="list-style-type: none"> <li>- Given wide selection and perceived difference between varieties, POS materials were considered more useful (in Loblaws: descriptions of usage, names, pictures of fruit)</li> <li>- Desire for some, to learn more about ideal pear ripeness and storage in home</li> </ul>
<b>Packaging</b>	<ul style="list-style-type: none"> <li>- Single serve preferred overall</li> </ul>



## Overview - Table Grapes



<b>Local / origin</b>	<ul style="list-style-type: none"> <li>- Low awareness / appreciation of Ontario grape varieties (for some considered non-existent)</li> <li>- Some preference for California-U.S. grapes over other countries</li> </ul>
<b>Variety</b>	<ul style="list-style-type: none"> <li>- All prefer Seedless</li> <li>- Preference split between Green and Red varieties overall</li> </ul>
<b>Quality</b>	<ul style="list-style-type: none"> <li>- Plump (suggests juiciness), round</li> <li>- Unblemished</li> <li>- Consistent bushel (few 'small grapes', rotting grapes)</li> <li>- Taste (preferred balance of sweet and bitter – tasted in store!)</li> <li>- Strong on the vine (few loose grapes)</li> </ul>
<b>Price and value</b>	<ul style="list-style-type: none"> <li>- Perception that grapes do go on sale! At \$.99/pound vs. \$1.99 per pound</li> <li>- Some wait until they see sales to buy</li> </ul>
<b>Presentation/merchandising/POS</b>	<ul style="list-style-type: none"> <li>- Little use or need for POS materials given simple decisions based on visual (e.g. red/green)</li> </ul>
<b>Packaging</b>	<ul style="list-style-type: none"> <li>- Clear, open bag is preferred</li> <li>- For some, desire for single serve display (as with other fruits)</li> </ul>





## Overview - Peaches



<b>Local / origin</b>	- Awareness of Ontario peach varieties when in season (preferred by many)
<b>Variety</b>	- For many 'a peach is a peach' – low familiarity with different peach varieties
<b>Quality</b>	- Soft but not mushy - Unblemished - Preferred colour: from some yellow to all pink (yellow signifies ripeness)
<b>Price and value</b>	- Low impact on price given perception of few peach varieties (suggest little variation in price)
<b>Presentation/merchandising/POS</b>	- Little use or need for POS materials given perception of few peach varieties to distinguish between
<b>Packaging</b>	- Single selection was preferred for those with smaller families or no kids - Ontario peach basket preferred for those who needed larger quantities



## Overview - Plums



<b>Local / origin</b>	- Limited awareness of Ontario varieties (yellow only) - low on radar
<b>Variety</b>	- Most preferred red or black varieties (none preferred yellow)
<b>Quality</b>	- Firm with 'bounce' - Unblemished - Solid colour
<b>Price and value</b>	- Some price comparison across types when deciding between red and black (or how many of each to purchase)
<b>Presentation/merchandising/POS</b>	- Little use or need for POS materials given simple decisions based on visual (e.g. red/black)
<b>Packaging</b>	- Single serve preferred overall

## 3.2 Fruit Store Selection

## Fruit Store Selection

- Consumers identified a range of stores from which they purchased fruit
- Key stores / store types and consumer perceptions are outlined below

3 ticks = best		Price / Value	Selection	Quality
	Farmers Market (St. Lawrence Market in Toronto)	✓✓	✓(✓)	✓✓(✓)
	Local Green Grocers (mainly in Toronto)	✓(✓)	✓✓	✓✓
	'Value' grocery stores (e.g. No Frills, Food Basics)	✓✓✓	✓✓	✓✓
	'Premium' Grocery Stores (e.g. Zehrs, Loblaws)	✓(✓)	✓✓✓	✓✓(✓)



## Fruit Store Selection

- In a larger, more 'premium' grocery store fruit/vegetable section, consumers wanted / expected :
  - An **organized layout** (easy to find what they're looking for)
  - A **wide selection** of product types/species and varieties
  - A **quick turnover** on shelf → suggests constant supply/availability of *fresh* product
  - **Neat and clean** store → lends to a more pleasant shopping experience → suggests product is also cleaner and of a higher quality
  - Helpful, knowledgeable **customer service** as required



### 3.3 Decision Making Process





## Overview – The Produce Shopping Context

- Produce – both fruits and vegetables – were typically shopped from a list (mental or paper), based on consumers' own familiarity with household staples and consumption. Despite this established sense of what they use and need, shopping the produce section was seen to be the most engaging and gratifying part of the store.
- This was seen to be driven by the variety of fruits available
  - Range of types (seasonally as well as year round)
  - Senses (colours and smells)
  - Choice of different fruit varieties (especially pears and apples given a wider selection)
- As a result, some consumers took their time when making a decision regardless of whether they were being rushed through the rest of their shopping trip
  - E.g. taking 15 minutes to select a couple of pears



## Overview – The Produce Shopping Context

- While largely habituated, produce shopping was still seen to be somewhat spontaneous at times, based on:
  - **Sales and Features** – drawn in to sales and deals, but also to larger or more elaborate POP displays that generate interest, or at least stimulate a closer look
  - **Seasonality** – additional selection during the season (e.g. apples, peaches) generates additional appeal and interest in taking advantage of product that is seen as higher quality at this specific time of year
  - **Variety** – for some, a desire to try something new, or prevent the household from becoming 'bored with the usual' may trigger consideration of less familiar or more exotic choices (e.g. star fruit)
  - **Visual Appeal** – if a particular fruit or variety is visually appealing / appetizing
    - For some, store stock can influence visual appeal (e.g. well stocked fruit suggests fresh, less 'picked-over')
  - **Cravings (less frequent)** – potentially driven by a recent positive experience with a particular fruit variety/type





## Overview – The Produce Shopping Context

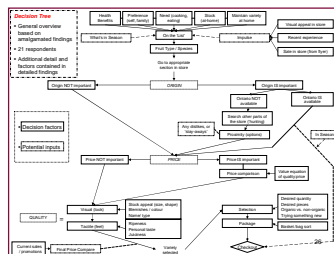
- Certain fruits were seen as more staple items in the household. As a result, the shopping process for these tended to be more habituated – associated with simply 'picking up the usual' or 'stocking up'
  - For some, this was reinforced by the degree of choice for certain fruits (e.g. apples, pears, plums)
    - habituated
    - Coping strategy for some - rather than selecting from wide range of varieties *every* shopping trip
  
- This generally varied between different fruit types overall, as outlined below
  - **Apples** – more staple, wide range of selection and very different tastes between varieties
  - **Grapes** – less staple, but limited selection lends to habituated decision in store (i.e. Green, Seedless)
  - **Plums** – more staple, somewhat wide range of selection and very different varieties (e.g. black, red, yellow)
  - **Pears** – less staple and wide range of selection (based on use, e.g. cooking vs. eating)
  - **Peaches** – somewhat staple, lower range of selection and little variance in perceived taste

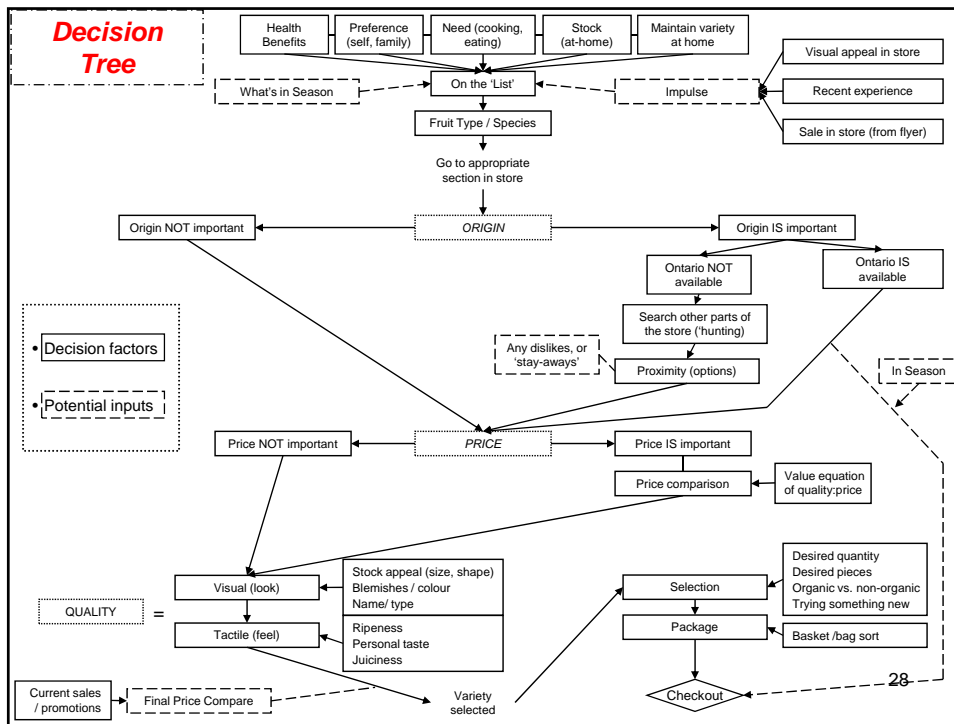
↑ INCREASING HABITUATION



## Overview – The Produce Shopping Context

- Outlined overleaf is a decision tree that summarizes the fruit decision making process
- At each stage there can be variations and fruit-specific factors that influence decisions. These have been included throughout this report
- **Please note that this decision tree is based on a sample of 21 qualitative interviews (regarding a variety of different fruits) and has been amalgamated to represent the process overall - as such, it is directional only**





**Ipsos In-Store Decision Making**

**TYPE OR SPECIES:**

- Selecting an appropriate and acceptable type of fruit was the first decision making criteria, based on:
  - **Individual Tastes/Preferences** – determined by their own preferences for fruit
    - Potentially impacted (positively or negatively) from recent experiences
  - **Family Tastes/Preferences** – particularly children, who were seen to be more selective in their fruit consumption
  - **Need** – what the fruit will be used for (e.g. cooking recipes, fruit platter, eaten on its own)
  - **Variety** – again, linked to kids' tastes, and keeping a variety in the house to prevent 'burn out', usually associated with a cycle, but also influenced by:
    - Seasonality – taking advantage of fresh/in-season product
    - Value – taking advantage of sales, promotions, etc.
  - **Stock** – keeping the household stocked with specific fruits
  - **Health Benefits** (for a few) – linking specific fruits to associated health benefits – e.g. always selecting oranges to ensure vitamin C consumption

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## In-Store Decision Making – Cont'd

### VARIETY:

- Similarly, the specific variety of the fruit was also determined largely by individual tastes:
  - **My Preference/Family Preference** – Specific varieties based on the tastes and needs within the household – e.g. avoiding tart apple varieties for kids, or 'unknown' varieties of pears (for some)
  - **Use/Purpose** (for a few) – Some distinction was made based on the intended use – i.e. eaten on its own versus use in cooking/baking. For a few, this reduced sensitivity to quality slightly, as 'cooking' fruit was expected to be peeled/processed at home (some blemishes were acceptable)
  - **Perceived quality** (as noted later) – primarily a combination of personal visual (look) and tactile (feel) assessment
    - Impacted by overall appearance of 'stock' (full stocked shelves suggest fresher, less picked over product)
- Many wanted the tried and trusted varieties (lower risk)
  - Desire for the fruit to be eaten in the household – not go to waste
    - Unused fruit = waste of food (and money!)
- Trail of new/different varieties through:
  - Out of home experience (e.g. at a friend's house, or restaurant)
  - Purchase of a small amount



## In-Store Decision Making – Cont'd

### VARIETY CONT'D:

- Overall, familiarity with certain fruit varieties was much higher than others, as outlined below:
  - **Apples** – most appreciated a range of apple varieties and which were preferred in the household based on specific qualities – e.g. sweet vs. tart, thickness vs. toughness of skin (for a select few), and consistency (i.e. crisp vs. 'mealy')
    - Macintosh and Red Delicious were most top of mind, with Honey Crisp, Spartan and Cortland somewhat less top of mind
    - Most had at least some sense of which apple varieties were available locally – typically linked to those that were most familiar (based on their own consumption/purchase)
  - **Pears** – some appreciated a range of pear varieties and which were suitable for different occasions (e.g. cooking, eating on its own, mixing into a fruit salad). However, appreciation of a wide range of pear varieties was less common
    - Anjou, Bartlett (mainly eating on its own) and Bosc (mainly for cooking) were typically the only familiar/top of mind varieties. As a result, other varieties seemed more exotic or at least unknown, reducing their overall appeal
    - Similar to apples (albeit less so), some had at least some sense of which pear varieties were available locally





## In-Store Decision Making – Cont'd

### VARIETY CONT'D:

- **Peaches** – few were aware of a range of varieties (in general a peach was a peach) → very few read/recognized the different names. However, some appreciated unique qualities of an Ontario peach
  - Some awareness of White Flesh peaches, but considered relatively new to many → unsure of characteristics (e.g. taste)
  
- **Plums** – basic awareness of a range of varieties based primarily on colour (Red, Black, Yellow)
  - Red (primary) and Black plums were most top of mind with very little familiarity around Yellow plums
  
- **Grapes** – several had a sense of which grape varieties were preferred in the household based on specific characteristics: Green vs. Red (vs. Black for a select few), Seed vs. Seedless, Organic vs. Non-Organic
  - All preferred Seedless ('easier' to consume, better for children)
  - Even split between preference for Red (sweeter, smaller size) and Green (more tart, larger size) with some leaving final decision to stock in store –
    - Some typically bought both for variety in home



## In-Store Decision Making – Cont'd

### VARIETY CONT'D:

- Few consumers referred to the corresponding fruit 'names' (on nearby signage) to identify fruit variety (except for apples and pears)
  - Typically, varieties were distinguished by physical characteristics (especially colour)
  
- For many, 'organic' was considered a separate variety – influence on decision making process based on personal understanding and perceived value of 'organic' (as noted later)
  - E.g. Ontario Peach vs. Organic Peach vs. Regular Peach
  - E.g. 'Organic' Green Seedless vs. 'Regular' Green Seedless
  
- Consumers sometimes used a process of elimination to narrow the range of selection to 1-3 varieties (especially for pears)
  - E.g. 'I'm not cooking so I don't want that, I don't know that one so I don't want that, that one looks less fresh so I don't want that...'







## In-Store Decision Making – Cont'd

### SEASON:

- All had some knowledge of when various produce was in season – and expected product on shelves to be local at the appropriate time of year. Beyond this, seasonality linked to quality and value:
  - **Quality** – An assumption that quality of the product was likely to be highest while the product was in season. This was associated with both taste and appearance
    - Driven by the assumption that in seasons fruits come from Ontario (for some) → higher quality (e.g. fresher, more flavourful)
    - Also driven by the assumption that in season fruits are grown more 'naturally' (e.g. outdoors vs. in a greenhouse)
    - For several, this was also linked to local availability, with in-season products expected to be local ones. For a few respondents, farmers markets or roadside stands (particularly in Guelph) were sought out for such items during the season
    - Similarly, reduced shipping time and distance meant that fruits were '*closer to the tree*' and not left to ripen unnaturally in crates/on a truck
  - **Value** – An assumption and/or expectation that, when in season fruits/vegetables should be less costly. This was linked to assumptions that increased supply would lower costs, but also a perception that less shipping time/distance would reduce suppliers' costs



## In-Store Decision Making – Cont'd

### SEASON CONT'D:

- For some, there was also a more general 'excitement' or 'warmth' to these items when in season, creating an emotional benefit of closer connection to seasonality generally, reconnecting with natural cycles/nature or their youth/childhood when this was the only time of year such products were available/affordable.





## In-Store Decision Making – Cont'd

### SEASON CONT'D:

- As noted, there was an expectation that when in season, selection of fruits in grocery stores — should be local
  - Especially for peaches and apples
  - Less so for grapes and plums – lower familiarity with Ontario options / varieties
  - Somewhat for pears, although there was a perception that there were few Ontario pear varieties
- While not always noticed or sought out in-the-moment, the discovery that foreign/non-local product was available alongside (or instead of) local product in season created a strong negative response for some (particularly for Guelph respondents), based on:
  - **Solidarity** – A desire to support local producers first, and frustration that foreign producers/interests were preventing this from taking place in grocery stores through the leverage of size (i.e. multinationals have more leverage than small local Ontario producers to get the product on the shelves)
  - **Waste** – Unclear reasons for shipping far-away product – and associated cost and environmental impacts – while a local alternative was available.
  - **Embarrassment** – At misunderstanding available varieties



## In-Store Decision Making – Cont'd

### QUALITY:

- All had their own standards for quality in terms of fruit. Though visual cues were most prominent, touch and feel also played strong roles:
  - **Visual** (Look) – Usually a first assessment of the overall quality of the selection – i.e. all the Spartan apples – then going in for a closer look to assess quality of individual pieces if acceptable
  - **Tactile** (Touch/Feel) – Particularly for pears, based on personal preferences around level of ripeness (and intended timeframe for use)
- Key factors for each fruit are outlined below:
  - **Apple** – size, colour appropriate to variety (e.g. even Green for Granny Smith), unblemished skin, shine (for some, though an artificial cue to a few)
  - **Pear** – firm with some give, consistent colour, relatively unblemished (albeit blemishes acceptable when used for cooking) – less knowledge around pear quality than other fruits
  - **Grape** – plump (suggests juiciness), round, unblemished, consistent bushel (few 'small grapes', rotting grapes), taste (preferred balance of sweet and bitter – tasted in store!), strong on the vine
  - **Peach** – soft but not mushy, unblemished, preferred colour: from some yellow to all pink (yellow signifies ripeness)
  - **Plum** – firm with bounce, unblemished, solid colour



## In-Store Decision Making – Cont'd

### QUALITY CONT'D:

- As noted, poor quality for one individual piece often reduced expectations of quality for the entire selection. A quick overview of the entire selection often determined if consideration would be given, or a closer look/inspection was necessary.
  - Bagged product was often assumed to be slightly lower quality, though many felt a quick glance through the bag would allow them to judge if, overall, quality was to their required level. In these cases, one (perhaps two) sub-par pieces would be acceptable - but not ideal - in a large bag.
  - Poor quality may trigger a choice not to buy a specific species of fruit, though it more often pushed them to another variety within that same species – e.g. From Spartan to Delicious – though not necessarily confirming same origin.



## In-Store Decision Making – Cont'd

### QUALITY CONT'D:

- Overall bonds (reasons to buy) and barriers (reasons to avoid) in selecting fruit based on **Quality** tended to highlight the following themes:

#### Bonds

- + Appearance/colour e.g. bright & shiny for apples
- + Origin (for some) – local to community, Ontario, Canada first
- + Familiar variety – known experience (sweet vs. tart, etc.)
- + Size (mid-large) – for some, desire for as much fruit as possible (large), but for others too big is too much fruit!
- + Preferred ripeness (based on colour and feel/firmness)
- + Smell for a very select few

#### Barriers

- Bruised/blemished
- Punctured
- Too shiny/waxy – suggests chemical/processed/unnatural (though not always for apples)
- For pears/peaches/plums – too soft/hard depending on personal preference
- Out of season – 'just know I'm not going to get a good one at this time of year...'
- Unfamiliar variety (for some) – 'stick with the ones I know/love, or the one my family will eat'
- One spoiled piece – casts doubts on all product (and other produce more widely)
- Origin – Too far away (e.g. South America, Asia) for fruits when in season





## In-Store Decision Making – Cont'd

### QUALITY CONT'D:

- While crunchiness, juiciness, and flavour were key cues of quality, consumers acknowledged that this was ultimately difficult or impossible to assess while in the store (with the proof being in the moment of consumption). For some, new varieties or recent additions based on season would be purchased in smaller quantities to 'check out' quality before investing in more.
  - However, this was less common for many – more likely to 'stick with what I know' to lower risk of upset
- Shelf life was not a conscious or top of mind signal of quality. Most buy what they feel to be an appropriate amount for their own consumption rate at home, and expect to eat it before it spoils. When this doesn't happen (i.e. it spoils on the counter/in the fridge), it's typically attributed to their own neglect or forgetfulness.
  - If buying multiple pieces (e.g. 5-7), many consumers would select from a range of ripeness to ensure some pieces are ready to eat right away while others would ripen later in the week



## In-Store Decision Making – Cont'd

### COST & VALUE:

- There was a sense that produce prices (fruits *and* vegetables) were increasing over time, particularly in the past several years. Despite this, overall sensitivity to the price of fruits and vegetables was not a strongly conscious one, though some exceptions did apply:
  - **Seasonality** – Out of season, higher prices are assumed and are noticed/felt more keenly.
  - **Volume** – For larger families, buying in bulk made bulk purchases (i.e. in bags) more likely, though as much for convenience (not having to sort through and bag themselves) as for perceived cost savings.
- In part, a lower sensitivity to the cost of fruits and vegetables was linked to a feeling that as fresh, healthy products, they were household necessities (rather than indulgences) → willingness to pay more for good product (healthy, nutritious, fresh, etc.) a somewhat more compelling value proposition.
- In addition, for many, there was a sense that varieties of fruits would be very similar in price
  - As a result, while some were more aware of price variations, others did not look at price until the very end of the decision making process (a few never looked!)
  - Difference when considering organic fruits - most considered organics to be in a slightly higher price bracket (worthwhile comparing price)



## Other Factors & Influences In Decision Making

### BRANDING:

- Brand was simply not on their radar. In fact, berries and bananas were the only instances where brand awareness or sensitivity took place at any level in the department.
  
- As such, brand did not play a conscious role in decision making during the shopping process at any level.
  
- For some, however, brand familiarity could be a factor with more unfamiliar fruits and vegetables → adds a level of confidence and reassurance
  - 'I don't know much about these, but I've heard of Dole'



## Other Factors & Influences In Decision Making

### GRADE:

- Very low understanding of what 'grade' refers to across all fruit types (embarrassing for some!)
  - In addition, few identified/recognized the 'grade' unprompted
  
- When prompted, all respondents noted that grade information was given without any context to help them make an assessment – i.e. 'What is Fancy Grade, and what is this compared to?'
  - This was true across all fruits, where differences in the grade noted had little impact on their perceptions of quality or their assessment of value for different products.
  - Additionally, the fact that (to their own criteria) poor quality products were visible in the display also fought against confidence in or reliance on an overarching 'grade' system (i.e. consumers determine quality themselves from piece to piece).
  
- However, some felt that understanding of the grading scheme could be useful (especially fruit types where variation is seen in store, e.g. fancy and extra fancy)





## Other Factors & Influences In Decision Making - Cont'd

### PACKAGING:

- Package preference varied greatly by household, depending on number of individuals in the home, but also preference for any one kind of fruit (or variety). As such, there was little sense of trend or theme across these interviews.
- Typically, less packaging was seen as better, as several consumers noted an increasing sensitivity to excess packaging in their wider shopping behaviour (e.g. re-useable bags at check out, etc.).
  - In addition, some perception that packaged fruits suggests lower quality fruit (e.g. 2-3 high quality pieces mixed with 1-2 low quality)
- While bags of apples (and other fruits/vegetables) were often seen as acceptable based on the need to buy in bulk, clamshell had stronger associations with excess packaging (and restricted choice) that several respondents were less enthusiastic (e.g. Ontario plums)
  - While respondents may not avoid clamshell packaging outright, it was not seen as ideal. Some would still grudgingly take the product if no alternatives were available.
- Loose fruits were seen as the ideal for all types and varieties (except for larger families and appetites), given the ability to pick exactly what they want – ‘how many we need, and to my exact quality specifications’



## Other Factors & Influences In Decision Making - Cont'd

### PACKAGING CONT'D:

- Response to the Ontario peach basket was mixed overall driven by household needs as well as familiarity to the packaging format (e.g. from childhood)
- Key perceived benefits and drawbacks are outlined below

Benefits / Strengths	Drawbacks / Weaknesses
<ul style="list-style-type: none"> <li>- Lower price for higher quantity → considered great value</li> <li>- Ability to pick and choose, or basket sort (explained overleaf)</li> <li>- Encourages (‘forces’) household to eat more peaches → especially important for mothers trying to get kids to eat more fruit</li> <li>- Recyclable packaging</li> <li>- Convenient to carry (handle)</li> <li>- Nostalgic (‘stopping by a roadside farmer’s stand when I was a kid’)</li> <li>- Signifies ‘Ontario Fresh’ for some</li> </ul>	<ul style="list-style-type: none"> <li>- Too many peaches! - for smaller families or those with no kids → suggests many will go to waste (not worth it)</li> <li>- All or nothing – if a couple of baskets were deemed ‘unacceptable’ some would walk away from Ontario peach baskets all together → suggests a bad batch</li> <li>- Less control (for some) → desire to select each peach individually</li> <li>- Separate section (away from other peaches) → potential to be overlooked, forgotten</li> </ul>





## Other Factors & Influences In Decision Making - Cont'd

### PACKAGING CONT'D:

- A key benefit of the Ontario peach basket was the 'basket sort'
- This typically progressed as follows:
  1. Identify and go to the Ontario peach baskets
  2. Visual scan of the selection, narrow in on a basket that 'looks good' (based on personal basket quality assessment: overall peach quality and basket size)
  3. Pick through the basket (varied from every piece in basket, to top layer only, to a few pieces)
  4. Replace unacceptable pieces with acceptable pieces from nearby baskets\* (typically 2-4 surrounding baskets chosen from) \*non would overfill the basket
- The 'basket sort' was typically accompanied by a feeling of guilt and some hesitation given interview scenario ('Am I allowed to do this?')
  - Permissibility through others in store ('I see others doing it, so I think it's ok')



## Other Factors & Influences In Decision Making - Cont'd

### PACKAGING CONT'D:

- Not all identified a clear link between the fruit basket and Ontario
- Link was typically driven by:
  - Memory / association (getting fresh peaches in a basket on the side of the road → feels local)
  - Abundance (large racks of fruit baskets suggests local, in-season produce)
  - Lower price (suggests in-season, local produce)
  - Visual appearance of the peaches ('you can just tell they're local – the size, the colour, everything')
- Actual labels and signage around the baskets were considered most effective at communicating 'Ontario' peaches
  - On the basket (e.g. 'Foodland', growers location, 'Vineland' etc.)
  - On the handle ('Ontario Grown')
  - On the signage (e.g. 'Ontario Peaches')





## Other Factors & Influences In Decision Making - Cont'd

### PACKAGING CONT'D:

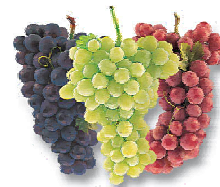
- Respondents were presented with an image of an alternate packaging option
- Overall, consumers preferred the basket driven by:
  - Inability to assess quality of fruit (albeit some appreciation that one can still 'feel' the fruit through the mesh)
  - Inability to 'pick and choose' (especially for those who enjoy the ability to customize their peach basket)
  - Excess packaging (and not all recyclable, e.g. mesh) → considered unnecessary
  - Less nostalgic / traditional ('But I like the basket!')
  - Weaker link to 'Ontario' for some
- For most, however, the new packaging would not be considered a 'deal-breaker' → would still want to buy Ontario peaches given quality/fresh perceptions
  - More of a 'deal-breaker' for those who didn't value Ontario origin as much – risk of overlooking Ontario packaged peaches all together



## Other Factors & Influences In Decision Making - Cont'd

### PACKAGING CONT'D:

- Overall consumers preferred the *open* plastic bag packaging for grapes
- Key benefits identified as the ability to:
  - View the entire bushel (i.e. by pulling the vine out of the bag for inspection)
  - Sample the grape (common factor in decision making process)
  - Touch the grape (assess quality based on firmness etc.)
  - Select desired quantity for some (e.g. use a separate store bag to package desired quantity, and/or combine like-priced grape varieties)
- Some desire for a standard unpackaged shelf display (as with other fruits)
  - Ability to select ideal bushel and inspect in its entirety







## Perceptions of Foodland Ontario

### FOODLAND ONTARIO:

- While most were familiar with the Foodland Ontario brand and logo, there was some lack of understanding about what it actually represented:
  - 'A co-op of growers?'
  - 'An industry association?'
  - 'A government agency?'
  - 'A grocery store?'
- ... For each, positive association was linked to 'Ontario' as a confirmation of origin and local production.
  
- Awareness was driven primarily by TV advertisement ('good things grow...')
  - With some playing back jingle



## Perceptions of Foodland Ontario - Cont'd

### FOODLAND ONTARIO CONT'D:

- For those who were more aware of the Foodland Ontario brand (albeit unclear on the specifics), it suggests about the product:
  - Safe, trustworthy (tested by Ontario governing body) → reassuring
  - It is local produce → signifier for some
  - It is grown in a safe, healthy manner (for a select few) → limited pesticide use
  
- When featured on signage (Guelph only) or packaging (Guelph and Toronto) in store, the Foodland Ontario logo was not noticed or mentioned unprompted.
  - When prompted, respondents felt it had little direct impact on their decision making. However, most did feel that the logo *should be* featured more prominently as a signal of Ontario products (to help them differentiate when navigating the section).





## Perceptions of Vineland

### VINELAND:

- Similarly, some consumers were familiar with the Vineland brand, but very unclear about what it actually represented:
  - 'Vineland estates winery?'
  - 'Niagara region?'
  - 'It's a farm somewhere in Niagara?'
- For some suggests premium quality associated with the Niagara region (e.g. wineries etc.)
  - Especially for those more familiar with the Niagara region
- However, overall, little impact on purchase decision



## The Role of Local (Ontario) In Decision Making

### LOCAL (ONTARIO):

- While local origin was often *reported* as an important factor in their decision making, observation suggests that, in *practice*, origin and locality were often not taken into (conscious) consideration:
  - Assume it's all local (in season) – When prompted, there was some surprise that non-local fruits were available alongside those that were local and in season.
  - Given this lack of awareness, there was little sense that origin was being confirmed/checked as part of their regular shop.
  - Similarly, even for those most interested in supporting local products were typically not confirming origin with signage – most often, this was linked to a sense that they knew which varieties were grown locally (though more for apples and peaches). In several cases, those who had expressed the strongest interest in local product actually selected non-local product when asked to pick something that would meet their needs – resulting in some embarrassment and frustration with the process.





## The Role of Local (Ontario) In Decision Making - Cont'd

### LOCAL (ONTARIO) CONT'D:

- The role of local origin tended to have the most impact on their decision making across the following areas:
  - **Variety / Species** – Selecting and seeking out local varieties when in season
  - **Season** – Acknowledging wider availability for local produce when in season – particularly for apples and peaches based on larger and more prominent displays (versus at other times of year, when other products are given emphasis).
  - **Quality** – As noted, assumptions that 'closer to the tree' and traveling less distance means better quality and better experience/taste (freshness!)
  
- For some, having the option of a local product vs. non-local product can be a primary factor in the decision making process (willing to pay a little more, willing to accept a few small blemishes, etc.)
  - However, very few were willing to compromise on quality
  
- For a few, value was seen to override the desire to buy local. If on sale, they were more likely to take advantage of savings, particularly for staples such as apples/pears/grapes that they expect to buy a lot of.



## The Role of Local (Ontario) In Decision Making - Cont'd

### LOCAL (ONTARIO) CONT'D:

- Reasons for choosing local varieties tended to focus on the following themes:
  - **Freshness & Quality** – Seen as being 'closer to the tree' means higher quality, tastier product. Not ripening in the case/on the truck. As such, this was seen as a strong quality advantage over non-local fruit.
  - **Eco/Environmental** – Less energy/carbon footprint in transportation. For a few, transportation of produce from long distances (e.g. South America, California) for species that can be grown locally was seen as unnecessary and wasteful. (More prominent in Toronto)
  - **Solidarity & Support for Local Industry** – Particularly for Guelph, there was a sense that local producers were 'part of their community', and support for their produce often extended to visiting roadside stands or farmers' markets. This was seen as an important part of supporting the shared community and keeping money/economy focused on the local (less top of mind for Toronto).
  
- As such, the primary barrier to purchasing local product was lack of awareness – consumers either fail to notice signage that highlights origin, or assume that local species/varieties are locally grown, particularly during season.
  - As noted, some were frustrated with the industry/retailer for making origin less prominent as part of their in-store communications, and for featuring non-local product rather than supporting local industry.
  - Despite this, there was little sense of vigilance in checking origin during these sessions.





## The Role of Local (Ontario) In Decision Making - Cont'd

### LOCAL (ONTARIO) CONT'D:

- For consumers who did not identify origin as influencing their decision making process, benefits of Ontario grown produce was less clear
  
- For some (especially in Guelph) there was a vague appreciation that buying local is 'helping the economy', but there was typically little understanding beyond this
  - Perception that fruit quality does not differ substantially between origins
  
- As a result, origin can come into play as a final deciding factor if all else is equal (variety, price, quality) as buying local is recognized as the 'right thing to do'
  
- Therefore, there is a need to know 'why I should care' as currently Ontario or local means little



## The Role of Local (Ontario) In Decision Making - Cont'd

### LOCAL (ONTARIO) CONT'D:

- There was mixed understanding/awareness of Ontario varieties across different fruit types, as outlined below:
  - **Apples** – broader awareness of local apple varieties, but also awareness (realization at shelf) that these same varieties may be US in origin. High expectations/assumptions that apples, when in season, are locally sourced
  - **Pears** – appreciation that there are Ontario pears, but perception that variety is limited (especially compared to standard selection)
    - Some preference for Ontario pears overall (for some pear shopping happens primarily in season)
  - **Grapes** – very low to zero awareness of Ontario varieties (some did not think there were any!)
    - Those that were aware of Ontario grapes felt that it was a very limited season and a potentially lower quality grape
      - Tough external surface
      - More slippery skin
      - More bitter taste
  - **Peaches** – stronger overall awareness and appreciation of Ontario peaches (considered high quality)
  - **Plums** – limited awareness of Ontario varieties - low on radar
    - Few were drawn to Ontario varieties as most preferred red or black varieties





## The Role of Local (Ontario) In Decision Making - Cont'd

### LOCAL (ONTARIO) CONT'D:

- For those interested in origin and/or buying local/Ontario, there was typically an order of preference of alternative origins
  1. Ontario
  2. Canada
  3. U.S.
  4. Europe / New Zealand
  5. Mexico
  6. 'Everything else' (e.g. South America, Asia etc.)
- Order driven by:
  - Distance traveled (shorter distance is better)
  - Assumed fruit regulations / guidelines (e.g. pesticide use, growing practices)
- Some were not concerned with origin overall, but did not buy from particular countries (e.g. Argentina, Cuba, or Mexico for some) – driven by:
  - Perception of less regulatory guidelines (e.g. pesticides in Mexico)
  - Potential for unwanted 'content' (playback of 'horror stories' about bugs in fruit, e.g. tarantula in grapes!)
  - General dislike of the country (e.g. for political reasons, traveling experience etc.)



## The Role of Organic In Decision Making

### ORGANIC:

- Overall, low understanding of what 'organic' really means (even among those who seek out and buy organic products)
  - *'I don't really know what that is'*
  - *'I know it's supposed to be better for you, but I've never figured out how or why'*
- As a result, low perceived value of organic products
  - Little impact on decision making process
- In addition, some skepticism surrounding the 'organic' claim (driven by low understanding and a higher price point) – not all believe there is a difference between organic and non-organic products
  - *'It's just a reason for them to charge more'*
- Additional skepticism and lack of understanding around the drawbacks of non-organic produce further limited perceived value / importance of organic products
  - *'I don't think non-organic is that bad'*





## The Role of Organic In Decision Making - Cont'd

### ORGANIC CONT'D:

- Given low perceived value of the organic label as well as the perception of a higher price point, many consumers wanted organic products to be located in a separate section in store
  - Limits risk of picking up organic 'by mistake'
  - Limits rack clutter ('let me choose between the products I actually want')
  - Allows consumers to comparatively shop the organic section as a whole (for those interested in organics)
  
- However for some who purchased organic fruits frequently, having the sections together was deemed beneficial
  - Allows for in the moment comparison (rather than walking back and forth to compare price, quality, variety etc.)
  - Encourages consideration ('sometimes I forget about organics or I don't see them in store')



Ipsos Camelford Graham

