Ipsos Forward Research

GEORGE MORRIS CENTRE

George Morris Centre

2009 Vineland Consumer Segmentation

May 2009

Nobody's Unpredictable

Table of Contents

Background

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.

The capacity to innovate and to implement effective processes that ensure delivery of consumer defined quality, is a function of inter and intra business relationships, monitoring of operational performance and consumer purchasing behaviour, and chain structure. The multi-phase project will therefore focus on understanding consumer perceptions of quality, and developing a method for effectively benchmarking and monitoring the performance of fruit value chains operating in Ontario's produce industry; along with structuring practices to enable an improvement in performance.

Ipsos has been commissioned by the George Morris Centre to conduct this multi-phase research endeavour. Due to the seasonal impact on the horticultural industry, the study will be conducted over the span of approximately one year.

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

This report summarizes phase II, the quantitative consumer segmentation research.

Research Purpose & Objectives

Research Purpose:

The primary purpose of this research was to better understand consumers of fresh whole-fruit by identifying distinct market segments to help VINELAND make informed decisions regarding how best to position and market fresh whole-fruit to consumer segments.

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;
- Uncovering fruit attribute association with Canadian or American produce;
- Identifying packing preference options for fresh whole-fruit; and,
- Determining preference in produce display at grocery stores.

Methodology

- This study was conducted via an online survey methodology. Sample for this study was derived from the i-Say panel of over 220,000 Canadians.
- The study was fielded between March 16th and 23rd, 2009 with 1139 total surveys completed. Based on this sample size, n=1139, maximum statistical margin of error is +/-2.89% at the 95% confidence interval.
- In order to qualify for this study the respondent needed to have at least some grocery shopping responsibility for their household and have purchased fresh whole-fruit (apples, pears, peaches, nectarines, plums, grapes) at least once during the four weeks prior to the survey.
- A monadic sampling approach was utilized for some questions where sample was split into six "cells" of relatively equal size to reduce respondent burden and gather fruit-specific results.
  - Apples, n=178,
  - Grapes, n=182,
  - Nectarines, n=209,
  - Peaches, n=174,
  - Pears, n=176, and
  - Plums, n=219.

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Executive Summary

Executive Summary - Shopping Behaviour

General Shopping Behaviour

- On average, Ontario grocery shoppers visit a grocery retail location approximately 8 times per month or twice a week not including urgent shopping trips.
- Overall, the majority of grocery shopping is conducted at mainstream or discount grocery stores with relatively small proportions indicating they routinely grocery shop at mass merchandisers, ethnic grocery stores, independents or farmers' markets.
- As with overall grocery shopping, the vast majority (81%) indicate they primarily purchase their fruit at a mainstream or discount grocery chain.
- On average, Ontario grocery shoppers spend $434 monthly on groceries for their household. Respondents indicated that of that total, approximately 17% ($73) is spent on fresh, whole fruit.

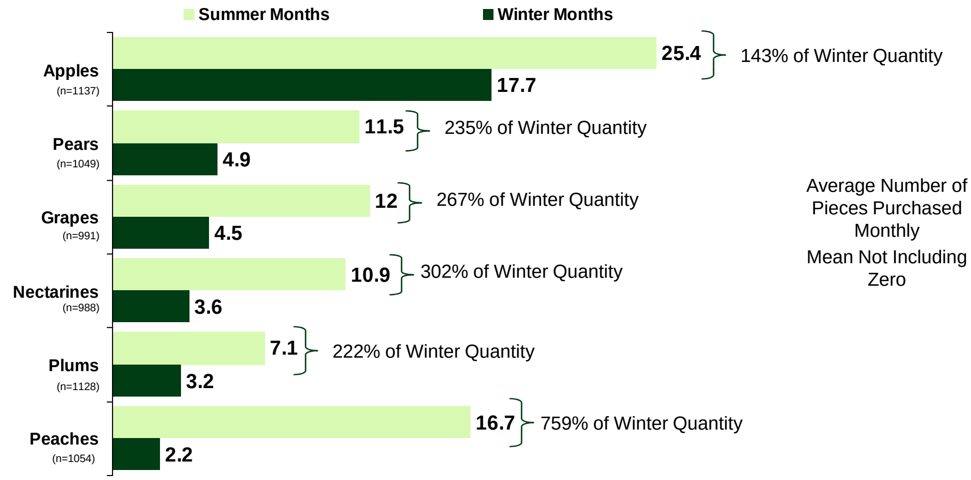
Executive Summary – Purchase Volume

Fruit Purchase Volume and Seasonality

- Respondents were asked to indicate which fruit, of an extensive list, they purchase often, sometimes, rarely or never. An analysis of results indicates the following:
  - The core fruit types for Ontario consumers (often/sometimes purchased by 90% or more) include apples, bananas, citrus and grapes. Strawberries are often/sometimes purchased by 88%.
  - Among the other Ontario fruit included in this research, pears and peaches are often/sometimes purchased by approximately two-thirds of Ontario fruit consumers
  - Nectarines and Plums are purchased often/sometimes by approximately half of Ontario fruit consumers.

Executive Summary – Purchase Seasonality

The chart below illustrates the average number of pieces or clusters purchased by consumers in winter and summer months. In both winter and summer apples lead all other fruit types in terms of pieces purchased, however, apple purchase volume increases least significantly in summer months. Of all fruit types, peach purchase volume increases most significantly, from an average of 2.2 pieces in winter to 16.7 pieces in summer.



Q19. Thinking back over the past 4 weeks (winter months), approx how many of each fruit type have you purchased for your household? Q20. And thinking about a typical Aug/Sept, when ON fruit is typically 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 – Defining Quality

Defining Quality

- When asked to define quality in fresh whole fruit in their own words, Ontario fruit consumers most often mentioned taste (49%), freshness (43%) or appearance (33%).
- When asked to select a specific region they identified as providing specific fruit of "highest quality", responses varied significantly. It is important to note, however, that although Ontario performs extremely well for may fruit types, imported options are widely viewed as being "also acceptable" in terms of quality.

	Ontario is Best Quality	Ontario is Acceptable Quality	Total
Apples	70%	25%	95%
Peaches	62%	29%	91%
Pears	49%	18%	67%
Plums	39%	25%	64%
Nectarines	30%	18%	48%
Grapes	29%	22%	51%

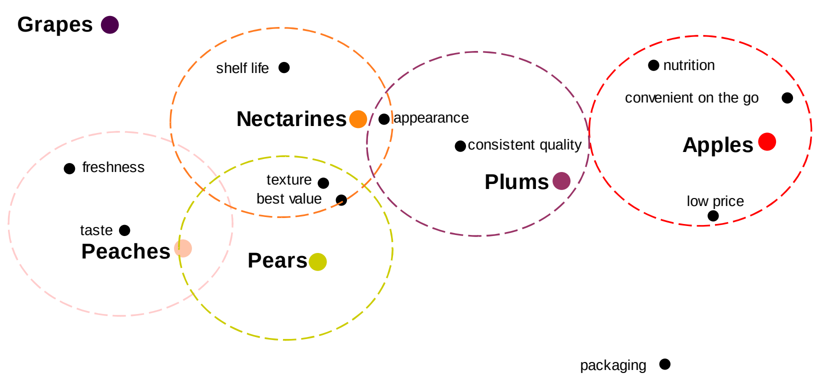
Product of USA and "Don't Know" are main competing mentions.

Product of USA is equally preferred.

Executive Summary – Perceptual Brand Map

Perceptual Brand Map for Ontario Fruit

- Below shows the attributes more strongly associated with specific Ontario fruit types.
  - Peaches: freshness and best taste.
  - Nectarines: best appearance, longest after-purchase shelf life, best texture and best value for money.
  - Pears: best texture and best value for money.
  - Plums: highest consistency in quality and best appearance.
  - Apples: convenient to eat 'on-the-go', highest nutritional value, and best price.



Executive Summary – Purchasing Ontario

Selecting Ontario Fruit

- Although it varies somewhat by fruit category, a significant proportion of Ontario fruit consumers indicate they always or often "actively" search for Ontario fruit options while shopping.
- Overall, 80% of Ontario fruit consumers believe it is relatively easy for them to identify Ontario fruit at their grocery retailer. The leading methods of identifying Ontario fruit are stickers and packaging.

	% of Total Fruit Inventory that is Ontario (Winter)	% of Total Fruit Inventory that is Ontario (Summer)
Apples	55%	81%
Peaches	23%	76%
Pears	23%	67%
Plums	20%	64%
Nectarines	14%	64%
Grapes	12%	55%

When asked to estimate the total percent of their grocerer's inventory that is product of Ontario by season, Ontario fruit consumers recognize seasonality of production and the presence of imported fruit during summer months.

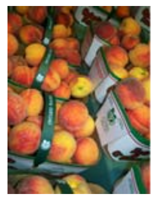
It is important to note, however, for all fruit that between 40%-50% of respondents estimated Ontario produced inventory to be between 75% and 100% during summer months.

- When asked to rank a number of potential reasons for preferring Ontario fruit, fresher, supports local farmers and better tasting were the top-3 selected items. Relative to other items available, the majority of respondents selected better for the environment and after purchase shelf life as either last or second last.

Executive Summary - Packaging

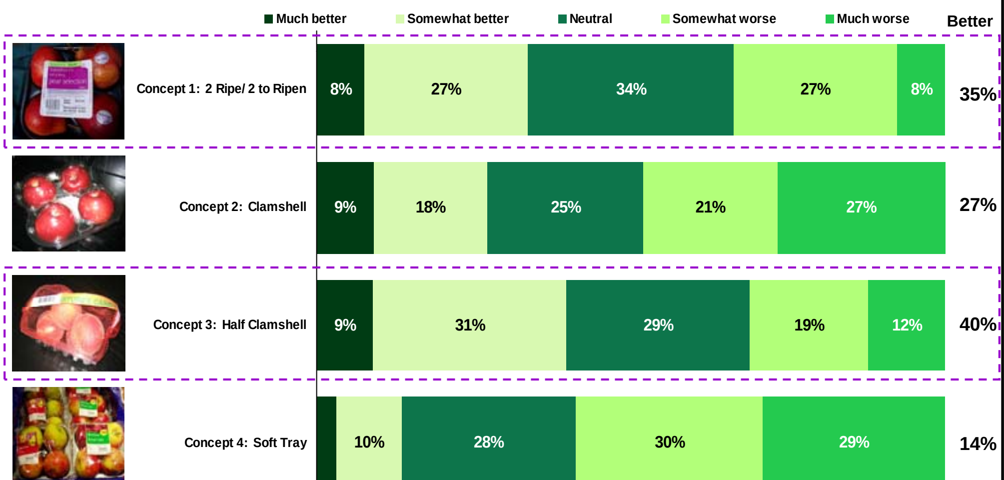
Fruit Packaging Preferences and Response to Concepts

- When asked to identify the format which they most preferred for each specific fruit types, Ontario fruit consumers overwhelmingly indicated a preference for “loose” (except for grapes). Baskets were selected as most preferred by approximately one third for peaches and plastic pre-picked bags were selected as most preferred by approximately one third for apples.
- Respondents were asked to provide specific advantages and disadvantages of Ontario peach baskets:
  - Primary Advantages: Easy to identify as Ontario (36%), Easy to inspect fruit (23%)
  - Primary Disadvantages: None (42%), Difficult to inspect fruit (18%), Quantity too large (16%)



Executive Summary – Response to Packaging Concepts

Respondents were asked to provide feedback on specific new packaging concepts shown below. Overall, none of the concepts stood out as strong opportunities. For all concepts less than half viewed them as “much/somewhat better” with a sizeable proportion viewing the packaging as worse.



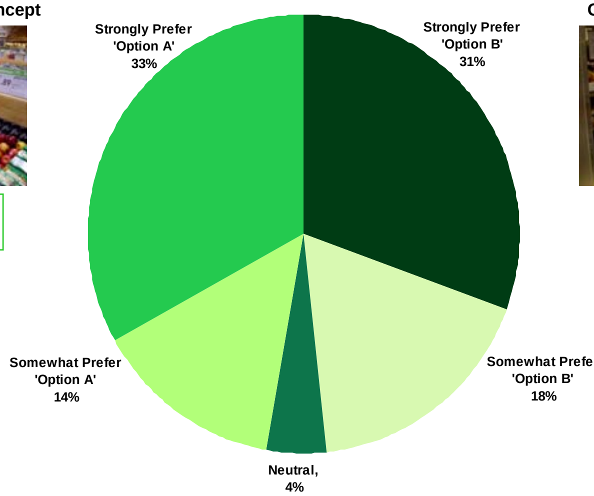
Q28. Using the scale below, please indicate the degree to which you would find this type of packaging better or worse than fruit packaging options currently available? Base: All Respondents n=1139

Executive Summary – Response to Merchandising Concept

Response to the merchandising concepts was evenly split, with approximately one third strongly preferring Option A and on third preferring Option B.

Option A: Canadian Concept

Prefer Option A
47%



Option B: UK Concept

Prefer Option B
49%

Q29. Below are two photos illustrating how fruit can be displayed in a grocery store. Please identify which display type you prefer using the scale provided. Base: All Respondents n=1139

Executive Summary – Segmentation Analysis Overview

Segmentation Process

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

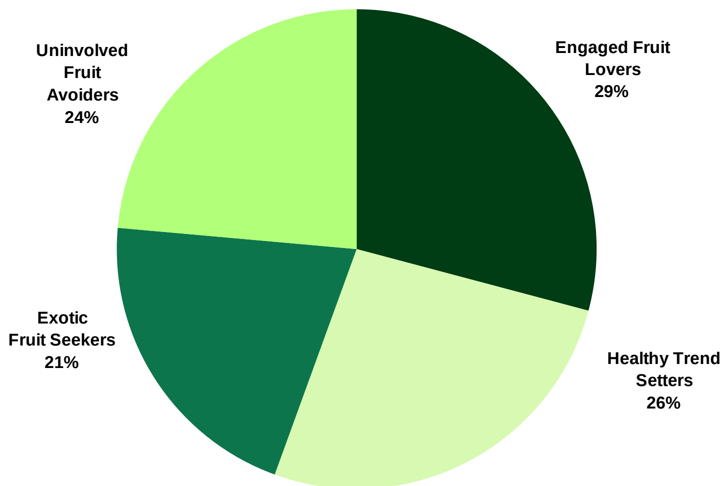
The process of developing the final segmentation solution included in this research included factor analysis as well as the development of a number of segmentation models.

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.

Executive Summary – Fruit Consumer Segments



Executive Summary – Key Distinguishing Characteristics of Fruit Consumer Segmentation

	Engaged Fruit Lovers n=330	Healthy Trend Setters n=299	Exotic Fruit Seekers n=235	Uninvolved Fruit Avoiders n=268
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.

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Recommendations

May 2009

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Implications and Recommendations

- With approximately four-in-five Ontario fruit consumers purchasing their fruit predominantly via mainstream and discount grocery stores, the opportunities for Ontario fruit marketers to "move the needle" need to focus on these outlets. While farmers' markets and independent retailers represent tangible opportunities, the effectiveness of strategies executed via these channels is limited by shopper penetration. Vineland should consider mainstream and discount grocery chains as the primary conduits to their target market.
- There is a high degree of seasonality in consumption of all fruit among Ontario fruit consumers, in the extreme case (peaches), consumption in pieces increases by over 700% in summer months relative to winter. Due to the growing season in Ontario, Ontario fruit marketers have the opportunity to match "the right product" with peak demand.
- A byproduct of seasonal availability of local fruit is that Ontario fruit consumers establish a habitual acceptance of imported fruit as there are no other options for many fruit during winter months. Although not perceived as being "highest quality", imported fruit scores nearly on par with Ontario for being of "acceptable quality". Ontario fruit marketers need to ensure that Ontario labeling and branding is noticeable and breaks through habitual fruit shopping behavior – approximately 40% of consumers estimate that 75%-100% of fruit available at their retailer in summer is from Ontario. Further, Vineland needs to ensure that the perception of "best quality" is delivered upon in the retail environment.

Implications and Recommendations

- There is sufficient evidence to support the continued use of the traditional Ontario fruit baskets. When asked to list advantages, fruit consumers were most likely to mention “identifies Ontario” while over 40% were unable to list a disadvantage of the baskets. Vineland should proceed with caution when considering a change from Ontario fruit baskets to another format.
- Response to the new packaging and merchandising concepts was mixed. Vineland should consider a more thorough examination of these concepts before proceeding with a change in packaging or recommended merchandising for retailers.
- The segmentation exercise established four unique segments. Vineland should consider the “persuasion staircase” on the following slide before identifying which segments need to be targeted with maintenance strategies and which need to be targeted with acquisition strategies.

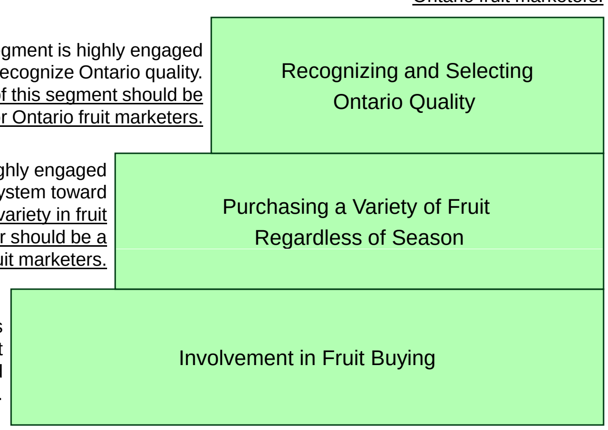
Persuasion Staircase for Segmentation

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.

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.

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.

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.



Detailed Findings

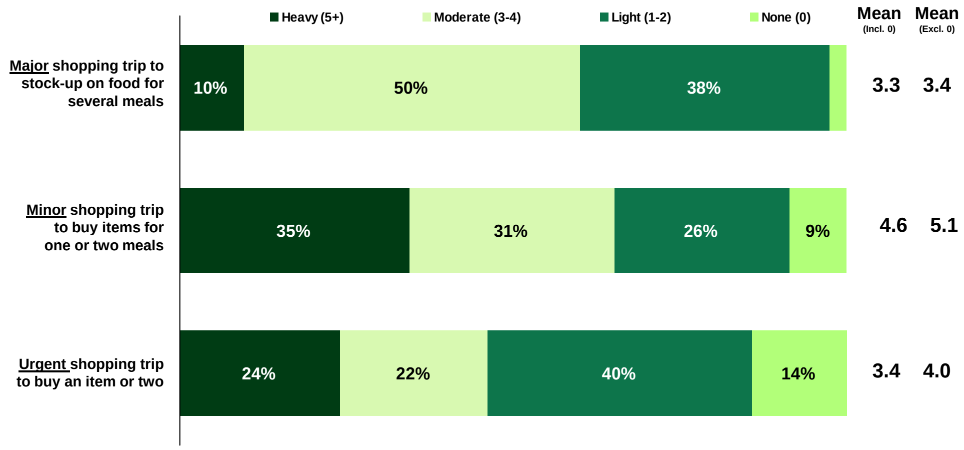
General Shopping Behaviour

Number of Shopping Trips in a Typical Month by Type

All Respondents

The vast majority of Ontario grocery shoppers visit a food retail location 7.9 times per month, not including urgent shopping trips:

- Virtually all respondents (97%) indicate they conduct at least one major shopping trip in a typical month. The average household conducts three or four such trips monthly.
- Among the 81% of respondents who conduct at least one minor shopping trip monthly, the average number of such trips is 5.1.



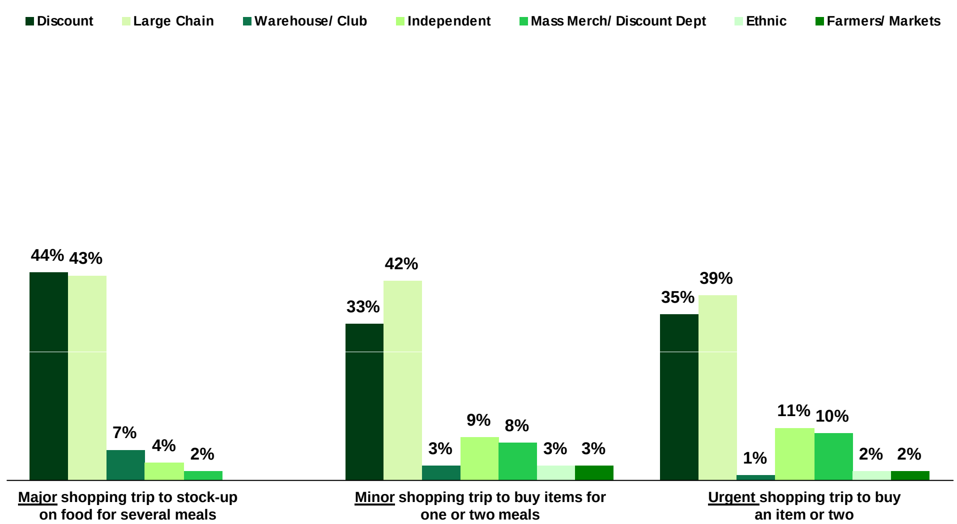
Mentions less than 9% are not labelled

Q1. How many major/ minor/ urgent shopping trips do you make for groceries in a typical month?
Base: All Respondents n=1139

Food Retail Location Associated with Type of Shopping Trip

All Respondents

Consumers tend to associate discount or large grocers with all shopping trip types, including urgent shopping trips.

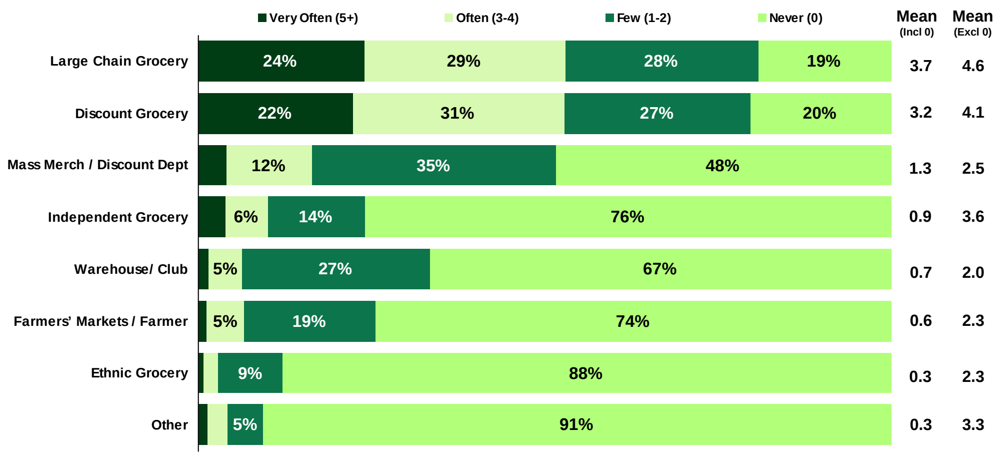


Q4. Please indicate the type of food retail location that you most strongly associate with each type of shopping trip listed below. Base: All respondents n=1139

Frequency of Shopping in Typical Month at Food Retail Locations

All Respondents

Approximately 80% of grocery shoppers shop at either a large chain or discount grocery store, establishing these retailers as the primary locations for Canadian grocery shopping. With 52% monthly penetration, mass merchandisers or discount department stores have emerged as a significant grocery retail type. Although independent retailers are only shopped by 24% of consumers, a high average number of shopping occasions suggests a captive or more loyal customer base.



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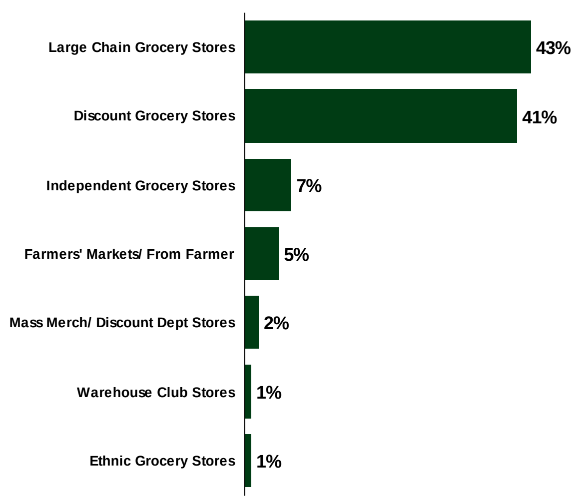
Q3. Approximately how many times in a typical month do you shop for groceries at each of the following types of food retail locations? Base: All respondents n=1139

Store Type Where Majority of Fresh Whole-Fruit Purchases Occur

All Respondents

Fruit purchase behaviour follows a similar trend with the majority of fresh fruit being purchased at large chain or discount grocery. Relatively few respondents indicate they purchase the majority of their fresh fruit at any of the other food retail types tested.



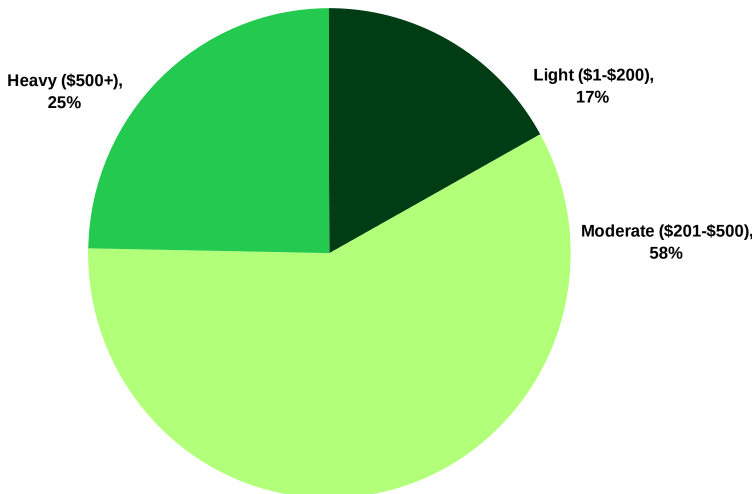
Q5. At which of the following food retail locations do you purchase the majority of your fresh whole-fruit? Base: All respondents n=1139

Typical Monthly Amount Spent on Food-Related Groceries

All Respondents

On average, Canadian grocery shoppers spend approximately $430 per month on food-related groceries. The range, however, is significant with one-in-five households spending less than $200 and one quarter of households spending $500 or more.

Mean $434



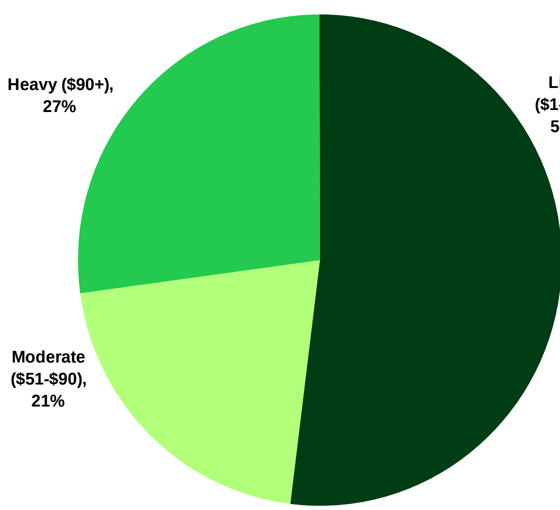
Q6. In a typical month, how much does your household spend on food-related groceries?
Base: All respondents n=1139

Typical Monthly Amount Spent on Fresh Whole-Fruit

All Respondents

On average, Canadian grocery shoppers spend approximately $73 per month on fresh whole-fruit. This suggests that approximately 17% of total grocery spend is fresh whole-fruit.

Mean $72.60

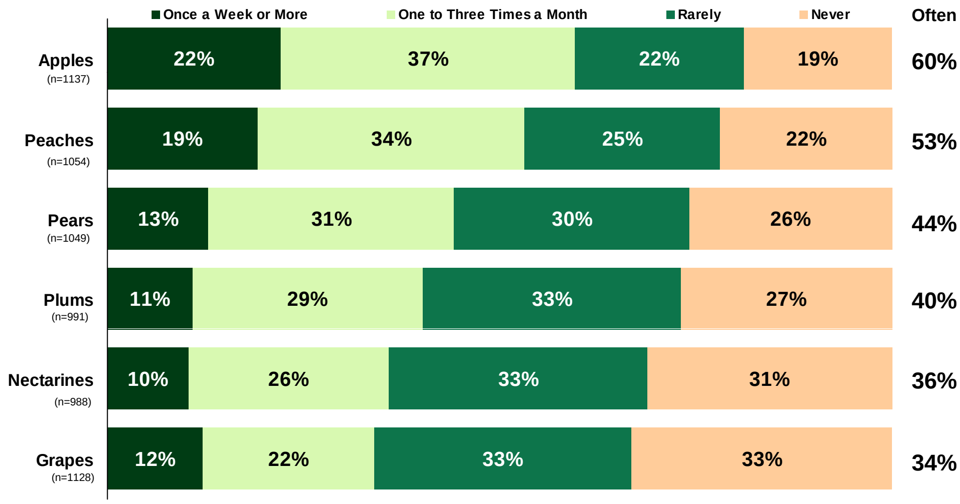


Q7. And in a typical month, how much would you estimate that your household spends on fresh whole-fruit? Base: All respondents n=1139

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

All Respondents

A sizeable proportion of consumers indicate they shop at farmers markets at least once per month during summer months. Apples and peaches are the fruit categories most frequently purchased.



Q22. 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 Q8

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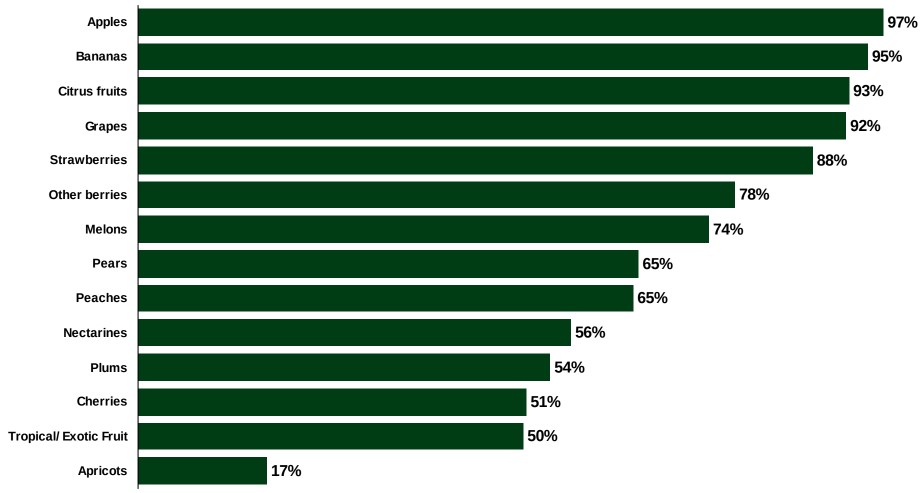
Fruit Purchase Volume and Seasonality

Frequency of Purchasing Specific Types of Fruit

All Respondents – Often/ Sometimes Summary

Nearly all consumers purchase apples, bananas, citrus, grapes or strawberries always or sometimes. Of the six Ontario fruit types tested, frequency of purchase often/sometimes is lowest for plums (54%) and nectarines (56%).

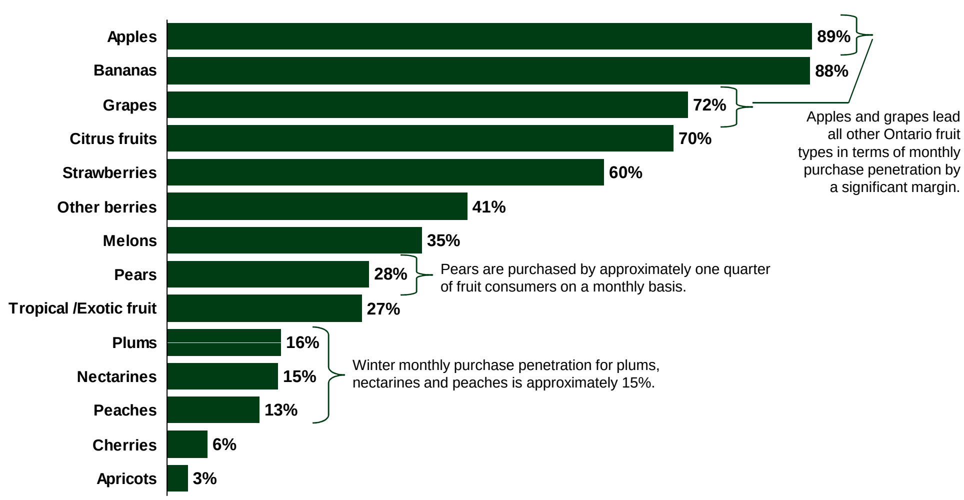


Q8. Listed below are a number of specific types of whole-fruit. For each type, please indicate whether you often, sometimes, rarely or never purchase that type of fruit as part of your regular grocery shopping.
Base: All respondents n=1139 (Often/ Sometimes Summary – Top 2 Box)

Types of Whole Fresh Fruit Purchased Last 4 Weeks: Winter Months

All Respondents

Among fruit consumers, apples and bananas have the highest monthly purchase penetration with nearly nine-in-ten buying during winter months. The second tier fruits, in terms of winter monthly purchase penetration includes grapes (73%), citrus (70%) and strawberries (60%).

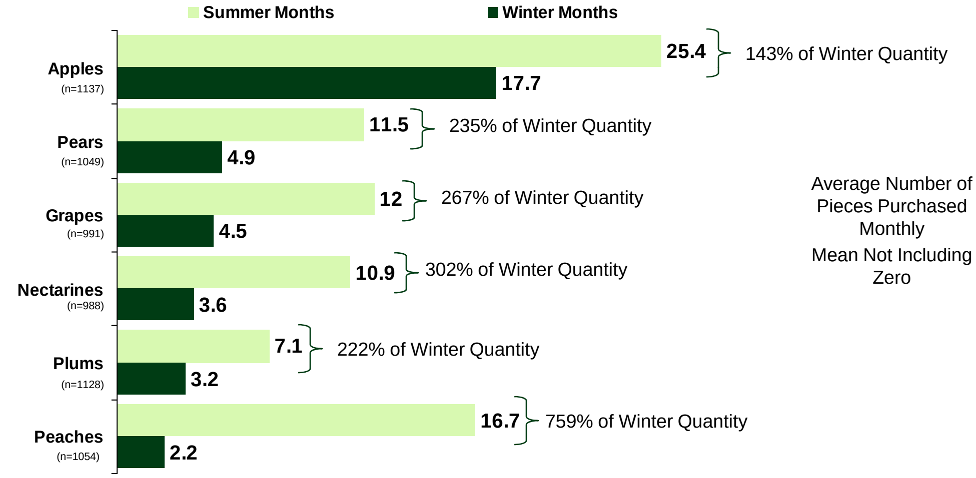


SC3. Which of the following types of fruit have you personally purchased for you or your household during the past 4 weeks (winter months)? Base: All respondents n=1139

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. In both winter and summer apples lead all other fruit types in terms of pieces purchased, however, apple purchase volume increases least significantly in summer months. Of all fruit types, peach purchase volume increases most significantly, from an average of 2.2 pieces in winter to 16.7 pieces in summer.



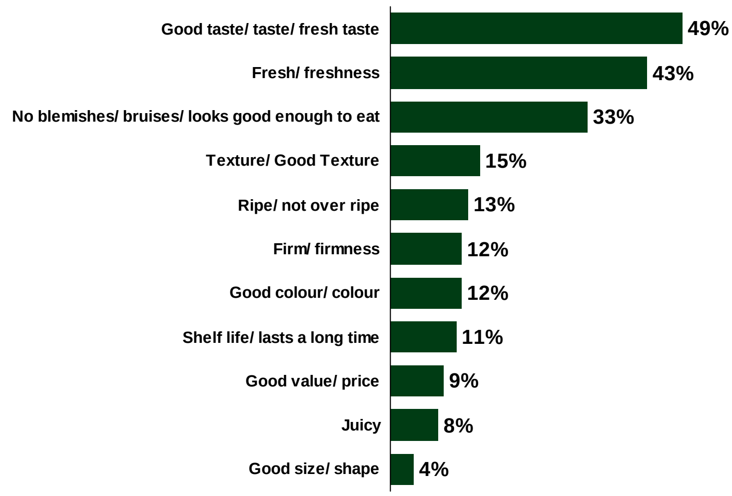
Q19. Thinking back over the past 4 weeks (winter months), approx how many of each fruit type have you purchased for your household? Q20. And thinking about a typical Aug/Sept, when ON fruit is typically in season, approx how many of each fruit type would you purchase for your household in a typical month. Base: varies by fruit- fruits where respondent said at least rarely in Q8.

Fruit Purchase Behaviour

Defining "High Quality" Open-End Responses

All Respondents

When asked to describe what quality means when it comes to fresh whole-fruit, respondents tended mention things associated with freshness, good taste and appearance.



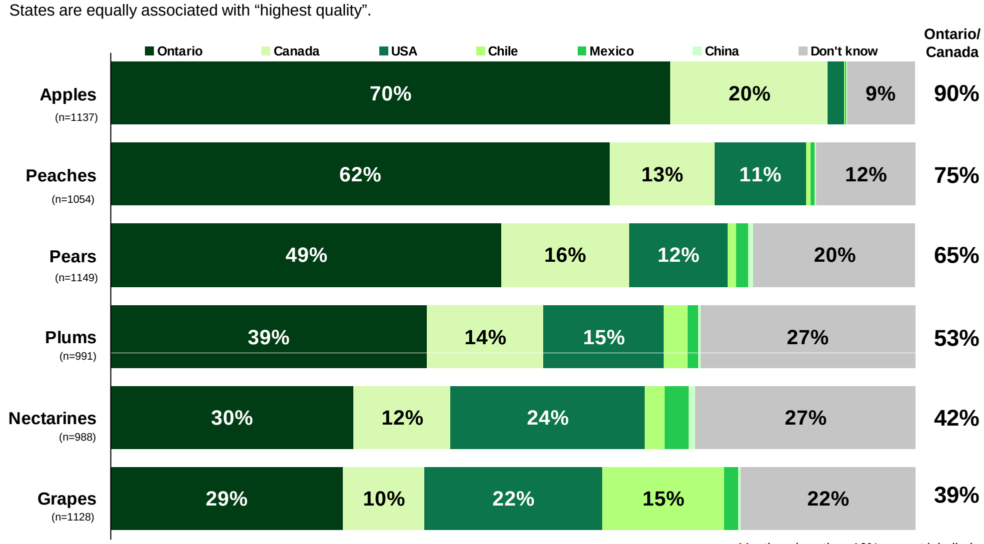
Mentions less than 8% are not shown (excluding size/ shape)

Q25. Thinking of fresh whole-fruit, what does 'high quality' mean to you? Base: All respondents n=1139

Origin of Fruit with "Highest Quality"

All Respondents

Respondents were asked to identify the region of origin they associated with "highest quality" from a list of alternatives. For apples and peaches, the majority selected Ontario, followed by Canada. For pears and plums, Ontario received the highest share, however, a significant proportion of respondents selected "don't know". For grapes and nectarines Ontario, elsewhere in Canada and the United States are equally associated with "highest quality".



Mentions less than 10% are not labelled

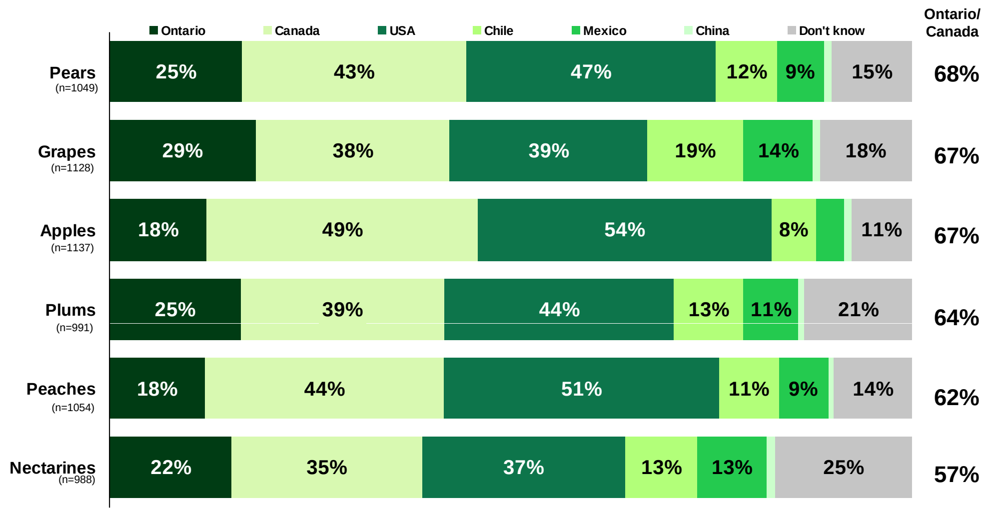
Q11. For each type of fruit listed in the table below please identify the region or country you most strongly associate with 'the highest quality fruit'. Base: Varies by fruit- fruits where respondent said at least rarely in Q8.

Origin of Fruit with "Acceptable Quality"

(Not Including Region with Highest Quality)

All Respondents

When it comes to identifying other regions which provide acceptable quality fruits, Ontario, Canada and the United States are the only regions with a significant portion of mentions. Relatively few Canadian consumers consider fruit from Chile or Mexico to be acceptable and virtually none consider fruit from China to be acceptable.



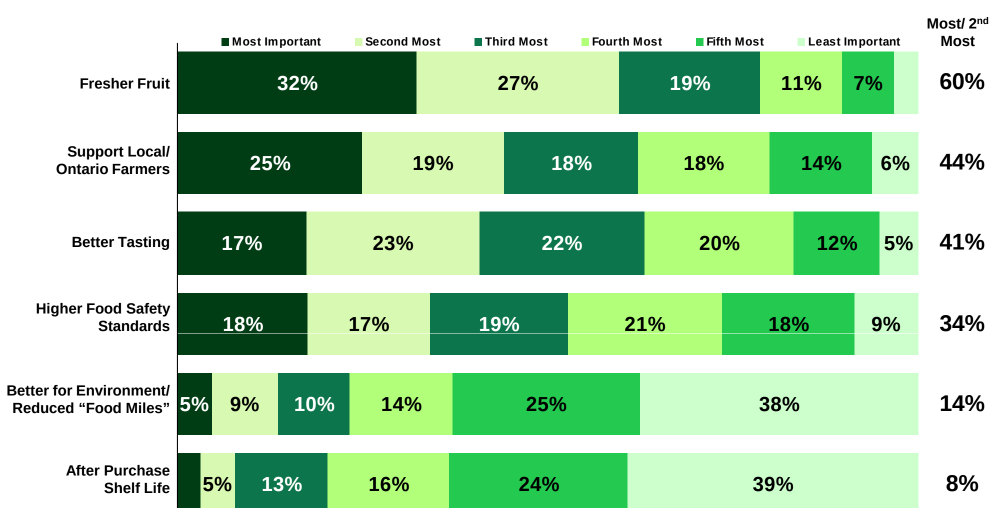
Q12. For each type of fruit listed in the table below please identify the regions or countries that you consider to offer 'acceptable quality'. Please select all that apply for each fruit. ' Base: Fruit(s) where respondent said at least rarely in Q8.

Mentions less than 8% are not labelled

Importance of Reasons for Purchasing Ontario Fruit

All Respondents

When asked to rank a number of potential reasons for preferring Ontario fruit, fresher, supports local farmers and better tasting were the top-3 selected items. Relative to other items available, the majority of respondents selected better for the environment and after purchase shelf life as either last or second last.



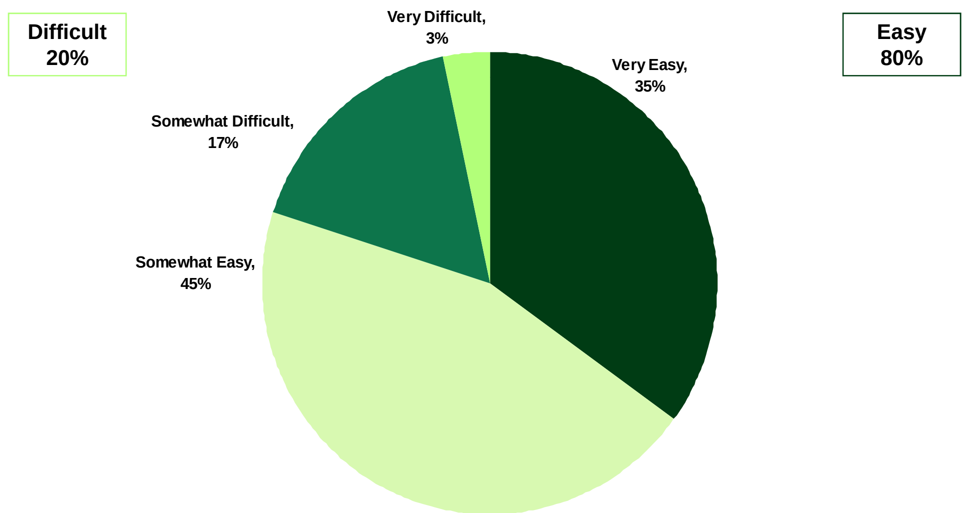
Q13. Listed below are several potential reasons for purchasing local Ontario fruit. Please rank these in order of importance to you personally from 'Most Important' to 'Least Important'. Base: All respondents.

Mentions less than 5% are not labelled

Ease in Identifying Ontario-Produced Fruit Options

All Respondents

The vast majority of consumers indicate they either find it very easy (35%) or somewhat easy (45%) to identify Ontario-produced fruit options where they do most of their grocery shopping.



Q14. 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=1139

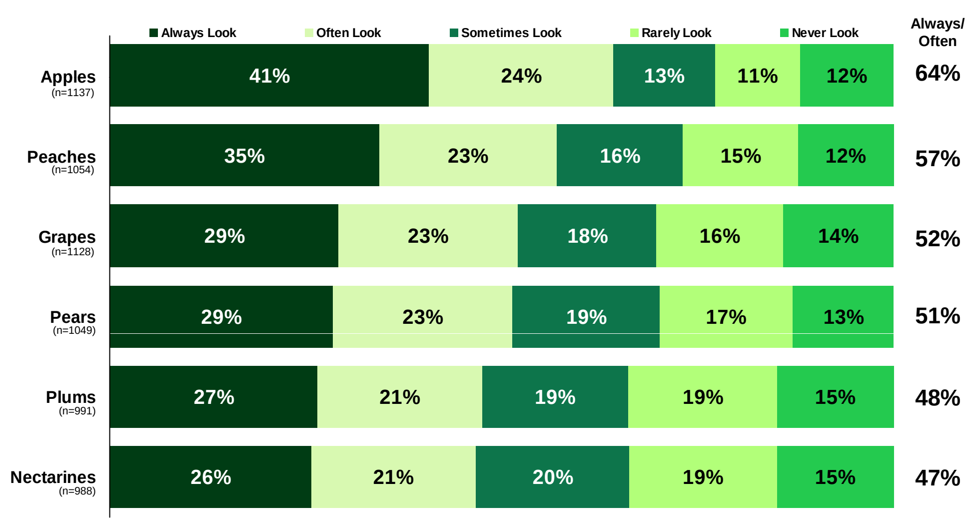
Ipsos Forward Research 41

Vineland Consumer Segmentation

Actively Look for Province/ Country of Origin for Fruits

All Respondents

The proportion of consumers who actively look for province/country of origin labels on fruit varies from one fruit type to another and is highest for apples (64%, always/often) and peaches (57%, always/often). Approximately one half of consumers always/often look for province/country of origin labels on grapes, pears, plums and nectarines.



Q10. 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 below. Base: Fruit(s) respondent said at least rarely in Q8

Ipsos Forward Research 42

Vineland Consumer Segmentation

Method of Identifying Province/Country of Origin

All Respondents

Stickers, in-store displays and packaging are the leading methods of identifying province/country of origin while shopping for fruit. Apple purchasers are slightly less likely to identify via stickers on fruit than purchasers of grapes, peaches, pears and plums.

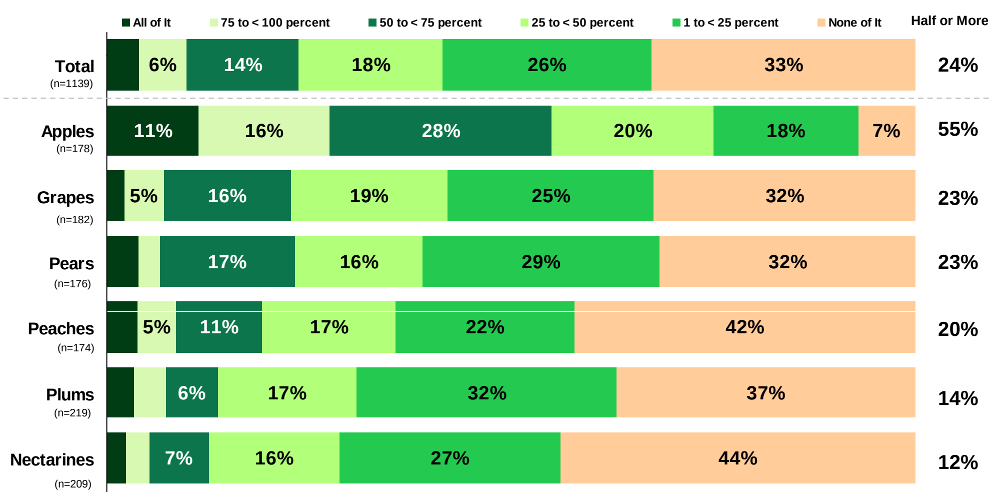
	Total (n=1139)	Apples (n=178) A	Grapes (n=182) B	Nectarines (n=209) C	Peaches (n=174) D	Pears (n=176) E	Plums (n=219) F
Stickers on Fruit/ Package	71	63	73 [A]	71	73 [A]	73 [A]	74 [A]
In-Store Display	56	51	49	60 [B]	57	56	63 [AB]
Packaging	51	50	58 [C]	47	52	52	50
Ask Employee	5	5	3	6	6	4	4
Other	<1	1	-	-	-	1	1
None of the above	4	5	4	4	5	2	3
Don't know	<1	-	1	-	-	1	-

Q15. Thinking about where you do most of your grocery shopping, which of the following (if any) do you typically use to identify the origin of fruit you are purchasing or considering purchasing? Base: All respondents n=1139

Proportion of Grocery Stores' Total Inventory Produced in Ontario (Winter Months)

All Respondents

Respondents were asked to identify what proportion of the fresh whole-fruit available at their grocery store was produced in Ontario during winter months. Apples are the only fruit where a sizeable proportion of consumers believe all or most of the product available to them in winter months is produced in Ontario.



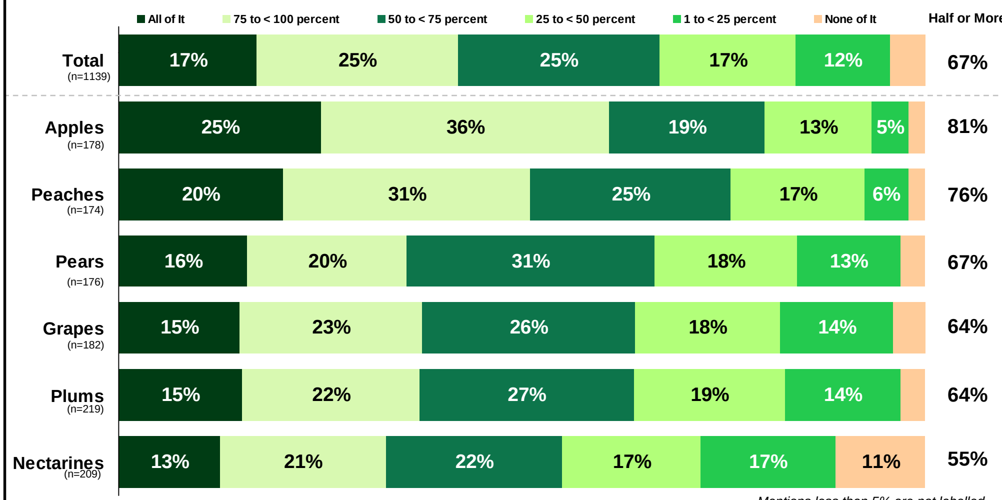
Mentions less than 5% are not labelled

Q16. For this question please think about your fruit purchases in the past 4 weeks (winter months). What proportion of your grocery stores' total inventory of would you estimate is produced in Ontario? Base: All respondents n=1139

Proportion of Grocery Stores' Total Inventory Produced in Ontario (Summer Months)

All Respondents

Not surprisingly, data illustrates that consumers identify locally produced products with summer months. This is true for all fruit types, but most significantly for peaches.



Mentions less than 5% are not labelled

Q17. For this question please think about a typical ... month when Ontario ... are 'in season'. What proportion of your grocery stores' total inventory of ... would you estimate is produced in Ontario? Base: All respondents n=1139

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Vineland Consumer Segmentation

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Fruit Packaging Preferences and Response to Packaging Concepts

May 2009

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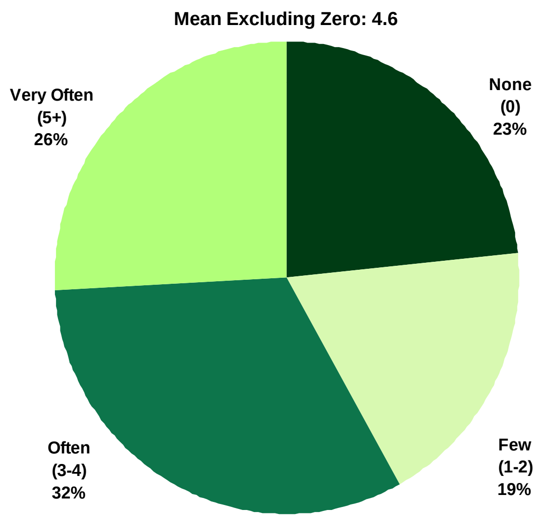
Purchases of Fresh Whole-Fruit as a Snack or On-the-Go Meal in a Typical Month

All Respondents

Three-quarters (77%) of respondents indicate they typically purchase fresh whole-fruit as a snack or on-the-go meal. The mean number of such purchases is approximately 4-5 per month or approximately once a week. For these consumers, the fruit itself is the packaging.

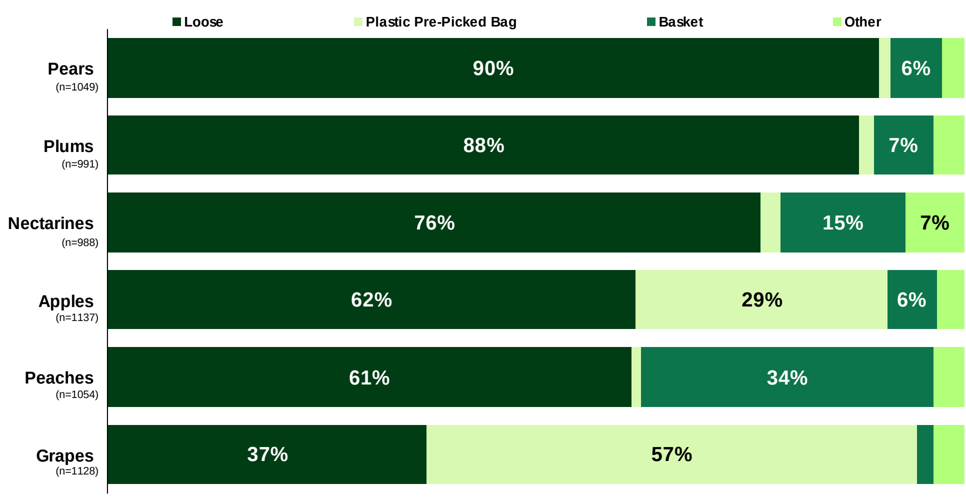


Q2. Approximately how many times in a typical month do you stop at a grocery store to pick up fresh whole-fruit to eat as a snack or meal 'on-the-go'? Base: All respondents n=1139

Most Frequent Packaging Format for Purchased Fruit

All Respondents

For pears plums and nectarines, the majority indicate they purchase these fruits in a loose format most of the time. Among those who buy apples, 62% indicate they most often buy loose, while 29% indicate they buy bags most often. A similar split occurs for peaches between loose and basket formats. Grapes is the only category where the loose format is less often purchased.



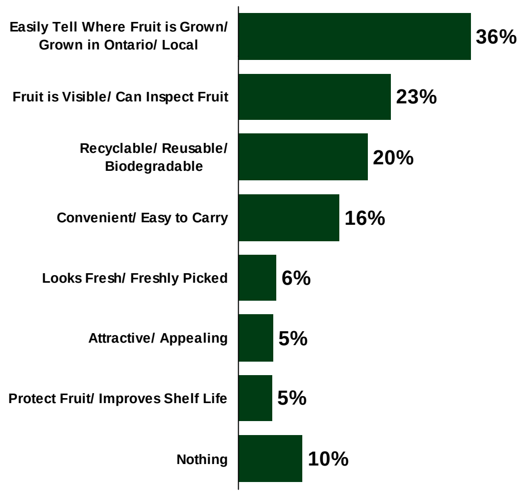
Mentions less than 6% are not labelled

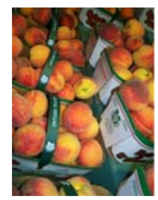
Q21. Overall, in what format do you most often purchase each type of fruit listed below?
Base: Varies by fruit- fruits where respondent said at least rarely in Q8.

Specific Advantages of Basket Packaging

All Respondents

Respondents were asked what, if anything, they specifically liked about the traditional basket format used to package Ontario fruit. Ease of identifying local options was the most often-mentioned advantage, followed by visibility of contents, environmentally friendly and ease of transportation.





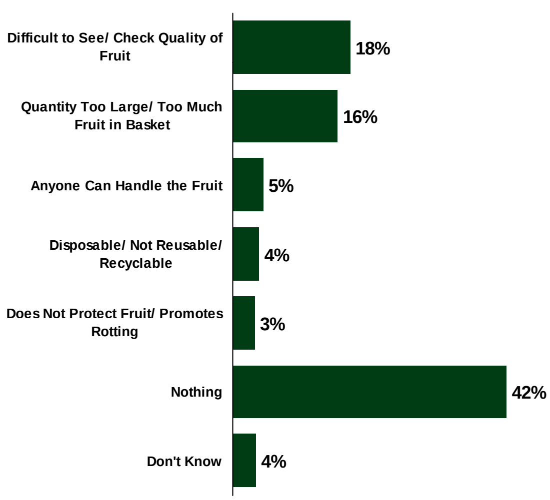
Mentions less than 5% are not shown

Q21a. What, if anything do you particularly like about the use of these baskets as packaging?
Base: All respondents n=1139

Specific Disadvantages of Basket Packaging

All Respondents

When asked about the specific disadvantages of traditional fruit baskets, 42% said “nothing”. Among the remainder, responses were relatively fragmented with small proportions mentioning: difficult to check quality of fruit, fruit falls out and fruit on bottom layer bruised/rotten.



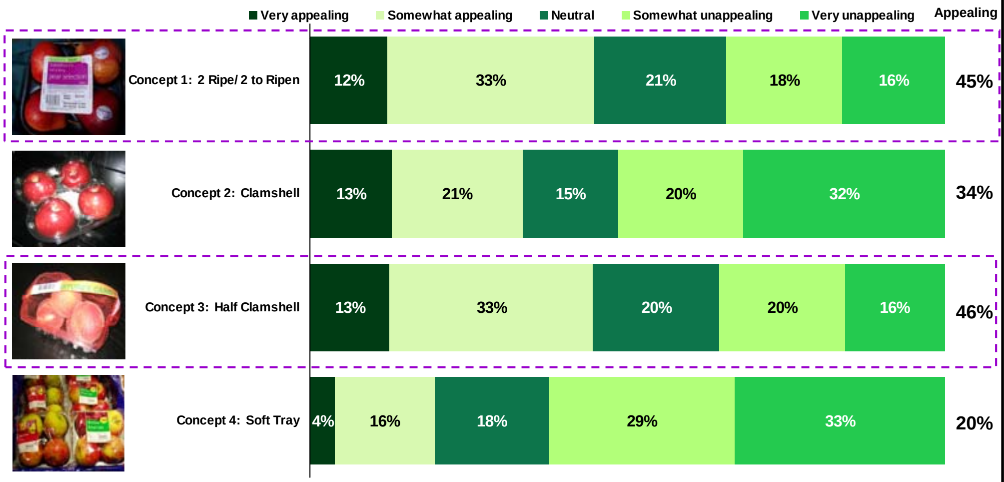
Mentions less than 4% are not shown

Q21b. What, if anything do you particularly dislike about the use of these baskets as packaging?
Base: All respondents n=1139

Concepts for Peaches, Plums, or Nectarines

All Respondents

Of the concepts tested for peaches, plums and nectarines, the “2 Ripe / 2 to Ripen” and “Half Clamshell” performed best with nearly on half finding them very or somewhat appealing. Response was relatively weak for the soft tray concept.

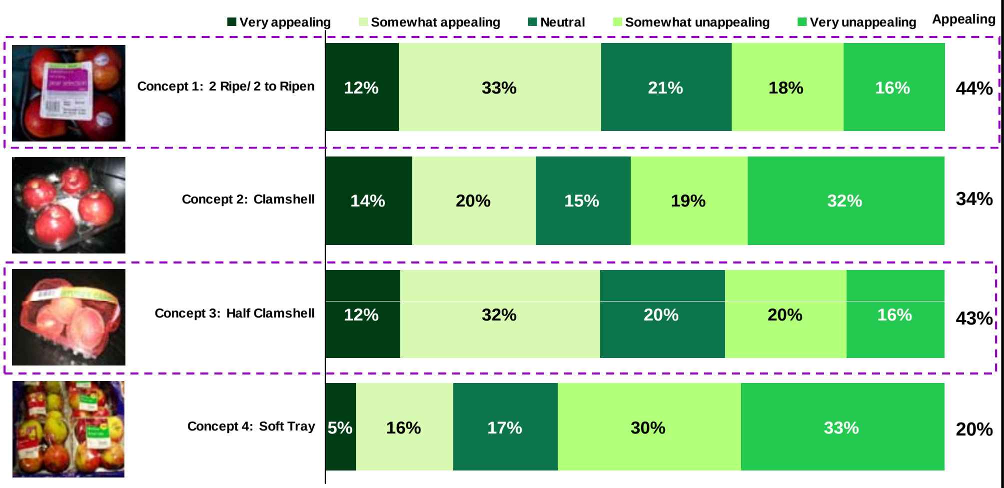


Q27. Using the scale below, please indicate the degree to which you would find this type of packaging appealing for the types of fruit listed below'. Base: All Respondents n=1139

Concepts for Apples & Pears

All Respondents

Response was similar for the apples and pears concept: the “2 Ripe / 2 to Ripen” and “Half Clamshell” performed best with nearly on half finding them very or somewhat appealing. Response was relatively weak for the soft tray concept.

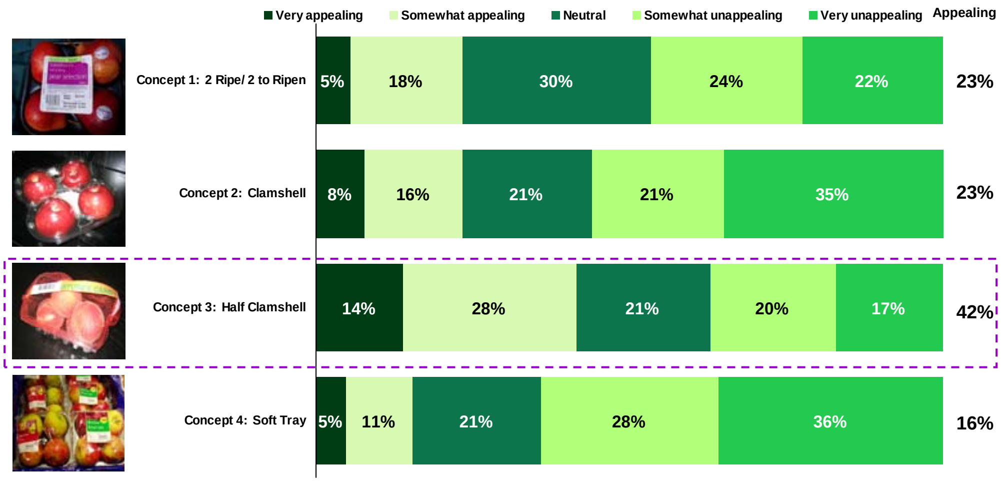


Q27. Using the scale below, please indicate the degree to which you would find this type of packaging appealing for the types of fruit listed below'. Base: All Respondents n=1139

Concepts for Grapes

All Respondents

Overall, only one of the packaging concepts performed well for grapes and that was the “half clam shell” concept.



Q27. Using the scale below, please indicate the degree to which you would find this type of packaging appealing for the types of fruit listed below'. Base: All Respondents n=1139

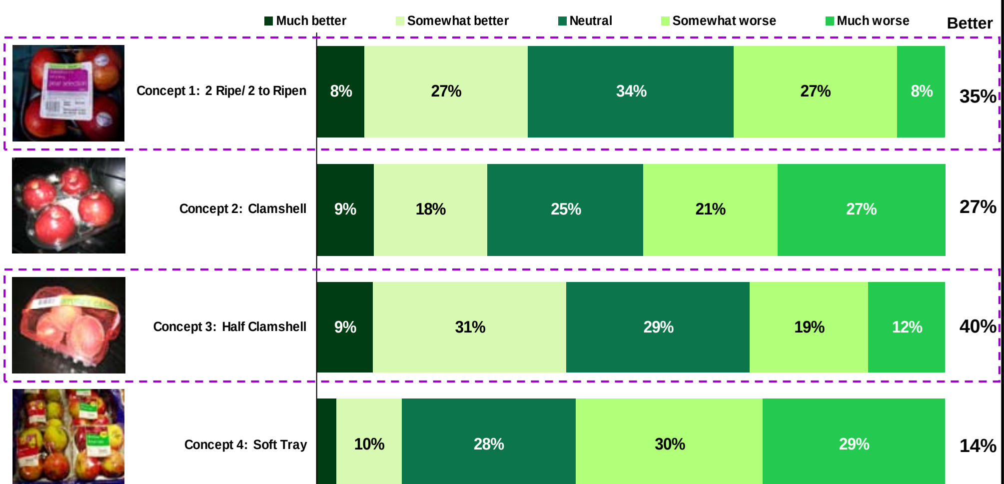
Ipsos Forward Research 53

Vineland Consumer Segmentation

Concepts Compared to Current Options

All Respondents

Compared to options currently available for fruit packaging, the concepts with the highest ‘better’ rating were the “half clamshell” (40%) and the “2 ripe/ 2 to ripen” (35%).



Q28. Using the scale below, please indicate the degree to which you would find this type of packaging better or worse than fruit packaging options currently available? Base: All Respondents n=1139

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Vineland Consumer Segmentation

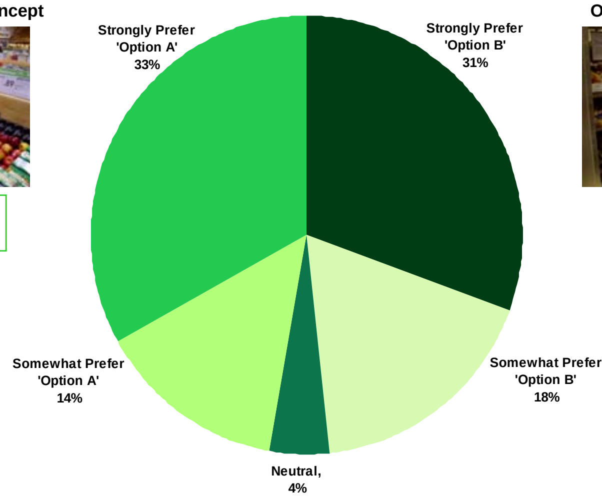
Alternative Fruit Display Options

All Respondents

Response to the merchandising concepts was evenly split, with approximately one third strongly preferring Option A and on third preferring Option B.

Option A: Canadian Concept

Prefer Option A
47%



Option B: UK Concept

Prefer Option B
49%

Q29. Below are two photos illustrating how fruit can be displayed in a grocery store. Please identify which display type you prefer using the scale provided. Base: All Respondents n=1139

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Performance Grid Analysis

May 2009

Nobody's Unpredictable

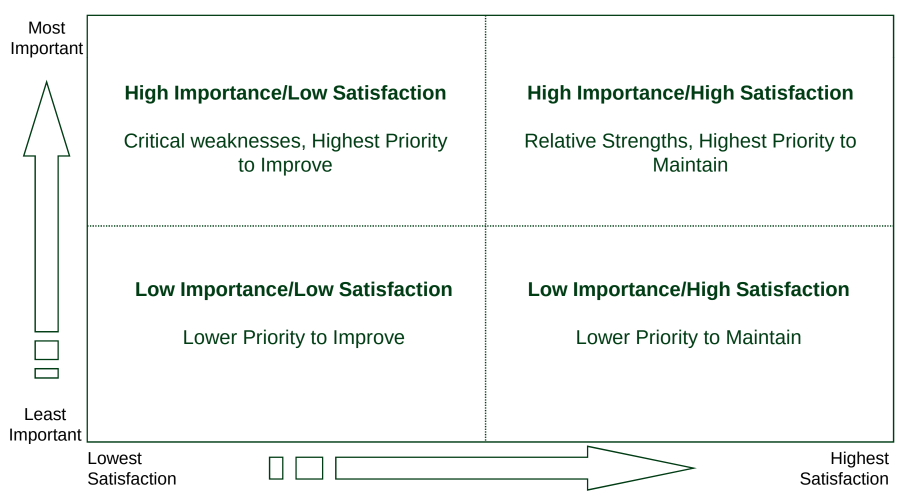
Explanation of Brand Perception Exercises

A key objective of this research was to identify relative strengths and weaknesses in consumer perceptions as they relate to specific fruits. Three methods were used to analyse these perceptions:

- Performance Grid Analysis: A technique that plots importance (in terms of driving consumption) and satisfaction for specific attributes on an axis to prioritize action.
- Brand Association Exercise: Respondents were asked to identify specific attributes they associate with Ontario versus U.S. fruit.
- Perceptual Brand Mapping: A statistical output that visually identifies specific characteristics associated with Ontario fruit.

Performance Grid Interpretation

Performance grid analysis is an exercise that plots fruit attributes on two dimensions: the importance of the attribute in terms of driving consumption and current satisfaction level with that attribute.



Performance Grid Analysis: Apples

For apples there appear to be unfulfilled needs associated with consistency in quality, value for money and after-purchase shelf life.

Importance (High Importance / Low Importance) vs. Satisfaction Performance (Top 3 Box) (Low Satisfaction / High Satisfaction)

	Low Satisfaction	High Satisfaction
High Importance	**Critical Weakness** Consistency in Quality Value for Money After-Purchase Shelf Life	**Relative Strengths** Freshness Texture Convenient to Eat 'On-the-Go' Convenient Packaging
Low Importance	**Lower Priority** Price Availability of Ontario Product	**Maintenance** Appearance Taste Nutritional Value Available Year Round

Performance Grid Analysis: Grapes

For grapes there appear to be unfulfilled needs associated with consistency in quality, value for money and price.

Importance (High Importance / Low Importance) vs. Satisfaction Performance (Top 3 Box) (Low Satisfaction / High Satisfaction)

	Low Satisfaction	High Satisfaction
High Importance	**Critical Weakness** Consistency in Quality Price Value for Money	**Relative Strengths** Appearance Taste Texture Convenient Packaging
Low Importance	**Lower Priority** Availability of Ontario Product After-Purchase Shelf Life	**Maintenance** Freshness Nutritional Value Convenient to Eat 'On-the-Go' Available Year Round

Performance Grid Analysis: Nectarines

For nectarines there appear to be unfulfilled needs associated with texture, value for money and after-purchase shelf life.

Importance	Low Satisfaction	High Satisfaction
High Importance	**Critical Weakness** Texture Value for Money After-Purchase Shelf Life	**Relative Strengths** Appearance Taste Nutritional Value Convenient to Eat ‘On-the-Go’ Convenient Packaging
Low Importance	**Lower Priority** Consistency in Quality Available Year Round Availability of Ontario Product	**Maintenance** Freshness Price

Satisfaction Performance (Top 3 Box)

Performance Grid Analysis: Peaches

For peaches there appear to be unfulfilled needs associated with texture, price, value for money and after-purchase shelf life.

Importance	Low Satisfaction	High Satisfaction
High Importance	**Critical Weakness** Texture Price Value for Money After-Purchase Shelf Life	**Relative Strengths** Appearance Freshness Nutritional Value Convenient to Eat ‘On-the-Go’ Convenient Packaging
Low Importance	**Lower Priority** Consistency in Quality Available Year Round	**Maintenance** Availability of Ontario Product

Satisfaction Performance (Top 3 Box)

Performance Grid Analysis: Pears

For pears there appear to be unfulfilled needs associated with consistency in quality, price, value for money and availability year round.

Importance	Low Satisfaction	High Satisfaction
High Importance	**Critical Weakness** Consistency in Quality Price Value for Money Available Year Round	**Relative Strengths** Taste Convenient to Eat 'On-the-Go' Convenient Packaging
Low Importance	**Lower Priority** Availability of Ontario Product After-Purchase Shelf Life	**Maintenance** Appearance Freshness Texture Nutritional Value

Satisfaction Performance (Top 3 Box)

Performance Grid Analysis: Plums

For plums there appear to be unfulfilled needs associated with price, value for money and after purchase shelf life.

Importance	Low Satisfaction	High Satisfaction
High Importance	**Critical Weakness** Price Value for Money After-Purchase Shelf Life	**Relative Strengths** Appearance Nutritional Value Convenient to Eat 'On-the-Go'
Low Importance	**Lower Priority** Texture Consistency in Quality Available Year Round Convenient Packaging	**Maintenance** Freshness Taste

Satisfaction Performance (Top 3 Box)

Perceptual Brand Mapping & Brand Association

May 2009

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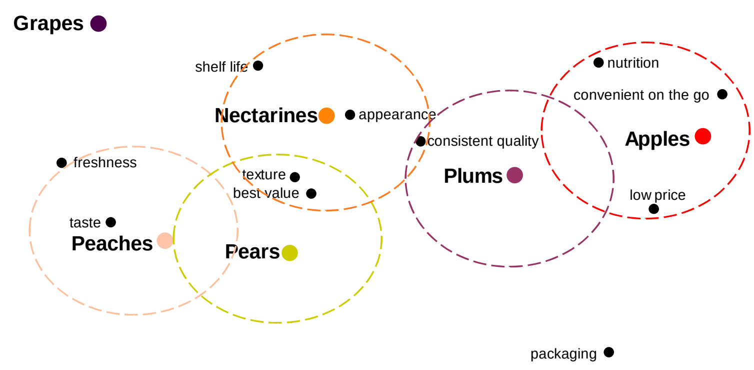
Explanation of Perceptual Brand Mapping

The perceptual brand map on the following slide identifies specific attributes that are most strongly associated with Ontario fruit types. The closer an attribute appears to a fruit type on the map, the more strongly associated it is.

It is important to note, however, that a long distance between an attribute and a specific fruit does not necessarily mean a negative association.

Perceptual Brand Map for Ontario Fruit



Brand Association Exercise

The following charts summarize results for a brand association exercise where rated attributes based on whether they associated that attribute with Ontario fruits or fruits produced in the United States.

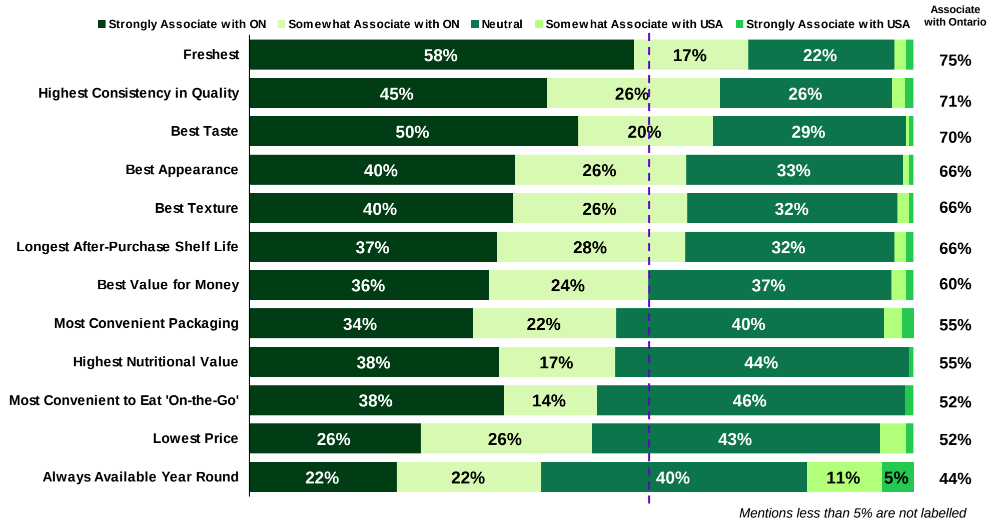
On each slide a dotted line has been added to identify attributes where Ontario fruit is most strongly associated.

With exception to year-round availability, preference for Ontario fruit was overwhelming on all attributes for all fruit.

Attribute Association: Ontario versus U.S.

Apples Cell

Generally, apples performed well for fruit attributes in terms of their association with Ontario. The majority of consumers say they associate freshness, high consistent quality, and best taste with Ontario apples. While the poorest performance of all attributes, nearly half of respondents say they do associate Ontario apples with year round availability.



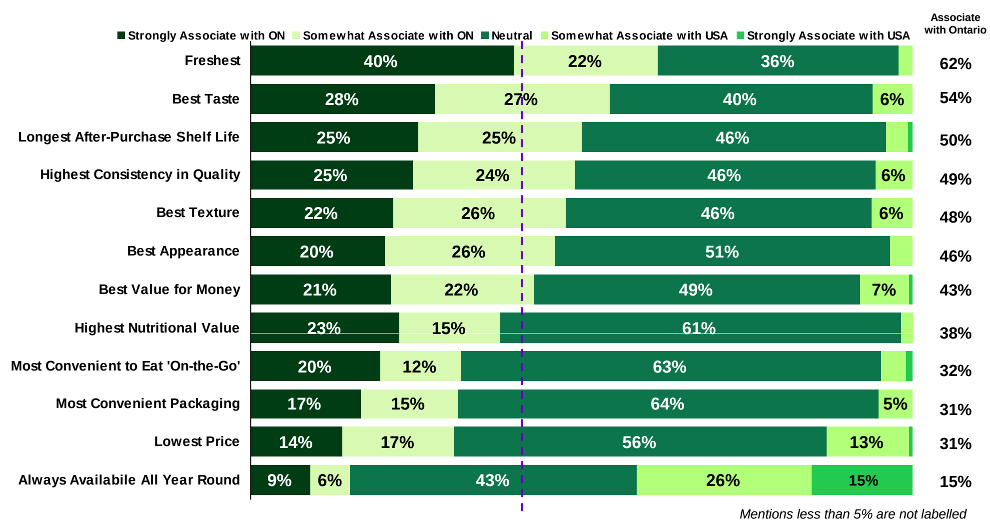
Mentions less than 5% are not labelled

Q24. Still thinking about ..., please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Apple Cell" n=178

Attribute Association: Ontario versus U.S.

Grapes Cell

Thinking about the grapes that are the freshest, two-thirds say they associate that with Ontario-produced. Grapes. Half also associate best taste, longest after-purchase shelf life, high consistency in quality, and best texture with grapes produced in Ontario.



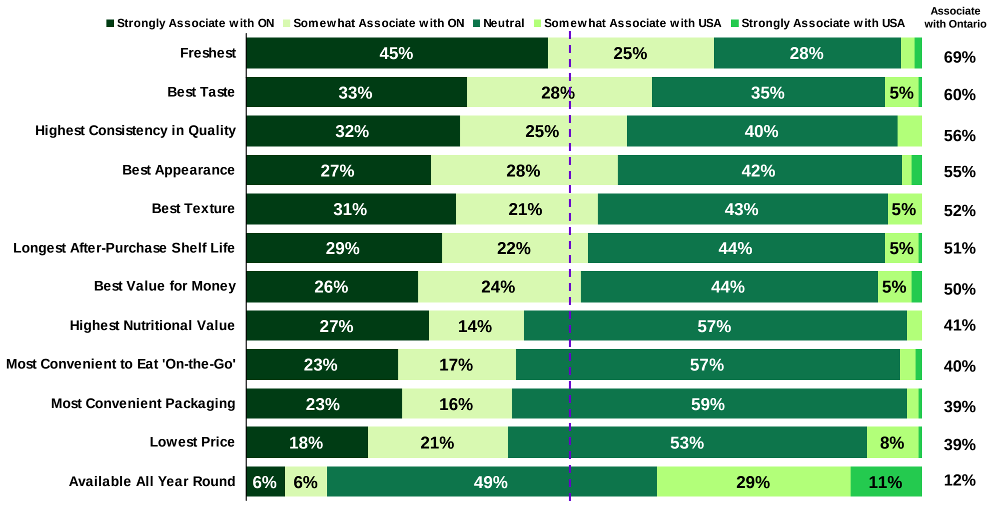
Mentions less than 5% are not labelled

Q24. Still thinking about ..., please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Grapes Cell" n=182

Attribute Association: Ontario versus U.S.

Nectarines Cell

When asked to associate attributes with Ontario-produced fruit or American produce, freshness, taste, quality, and appearance were associated with Ontario fruit by more than half of consumers.



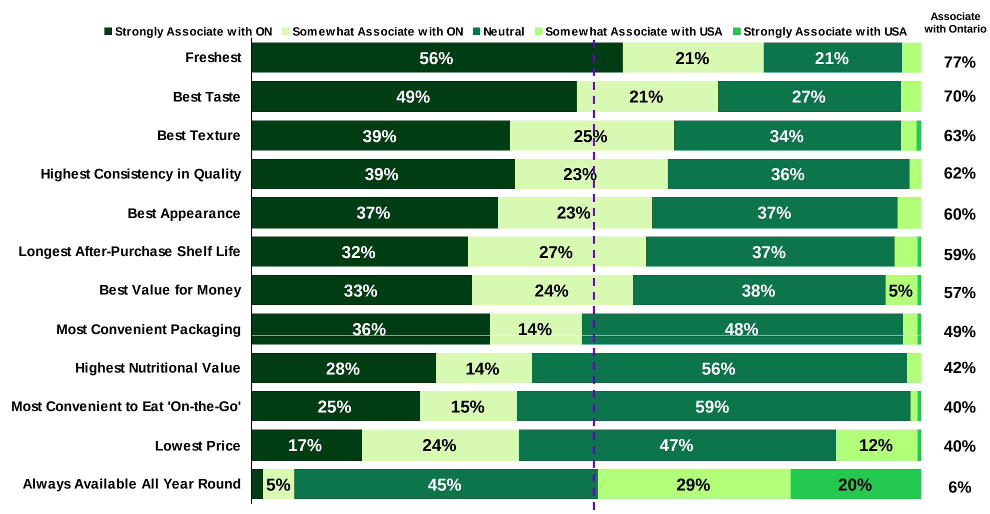
Mentions less than 5% are not labelled

Q24. Still thinking about ..., please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Nectarines Cell" n=209

Attribute Association: Ontario versus U.S.

Peaches Cell

Ontario Peaches, are associated with freshness and taste by the good majority of consumers. Six-in-ten also say they associate best texture, highest consistency in quality, best appearance, longest after-purchase shelf life, and best value for money with Ontario-produced peaches.



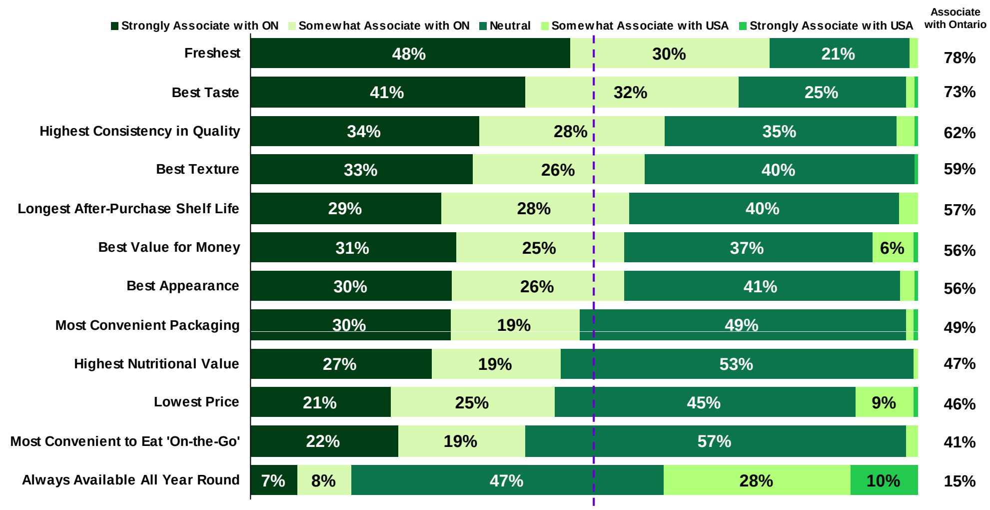
Mentions less than 4% are not labelled

Q24. Still thinking about ..., please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Peaches Cell" n=174

Attribute Association: Ontario versus U.S.

Pears Cell

On nearly all attributes, at least half of consumers say they associate pears produced in Ontario with these positive attributes. Other than the year round availability of pears, respondents said they either associate the fruit attribute with Ontario produced pears or say they are neutral in their association.



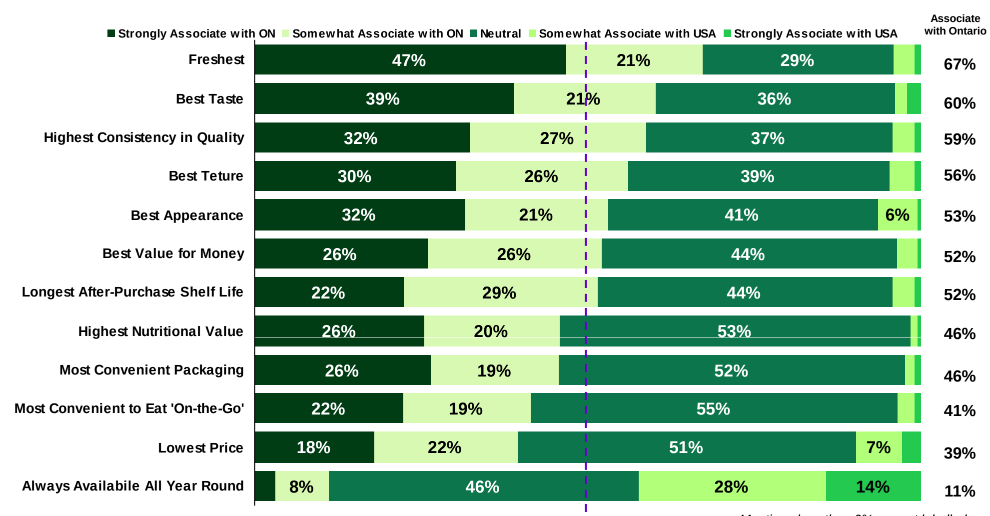
Mentions less than 4% are not labelled

Q24. Still thinking about ..., please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Pears Cell" n=176

Attribute Association: Ontario versus U.S.

Plums Cell

As with the other fruit cells, the highest performing attributes for Ontario plums are freshness, taste, consistency in quality, and texture.



Mentions less than 6% are not labelled

Q24. Still thinking about ..., please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Plums Cell" n=219

Agreement Statements for Use in Segmentation

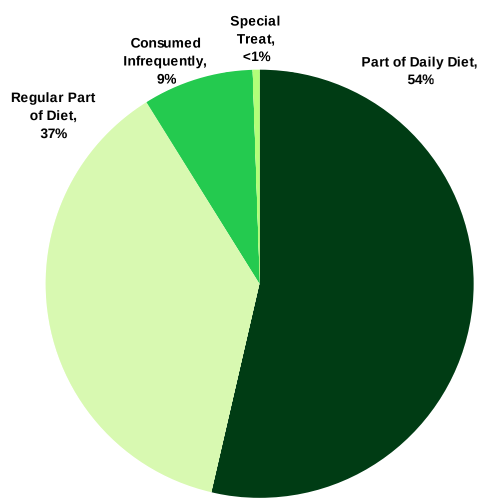
May 2009

Nobody's Unpredictable

Role of Fresh Whole-Fruit in Diet

All Respondents

Fruit plays an active role in the majority of consumers' diets, either as part of their daily diet or a regular part of their diet.

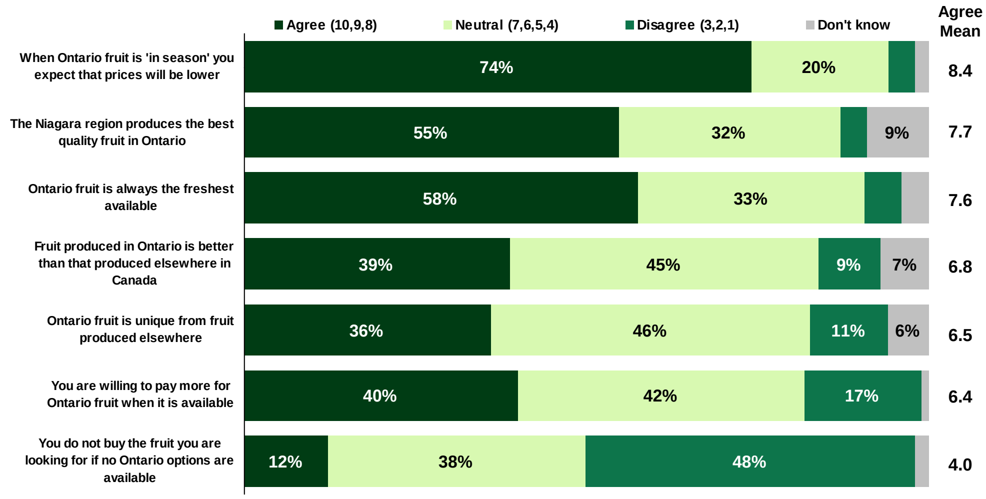


Q18. Which of the following statements best describes the role that whole-fruit plays in your diet?
Base: All respondents n=1139

Statements Related to Ontario Fruit Specifically

All Respondents

The majority of respondents expect the price of local fruit to be lower when it is 'in season' and more than half say the Niagara region produces the best quality fruit in Ontario and when available Ontario fruit is the freshest. Only a small proportion of respondents they do not buy the fruit they are looking for if Ontario options are not available.



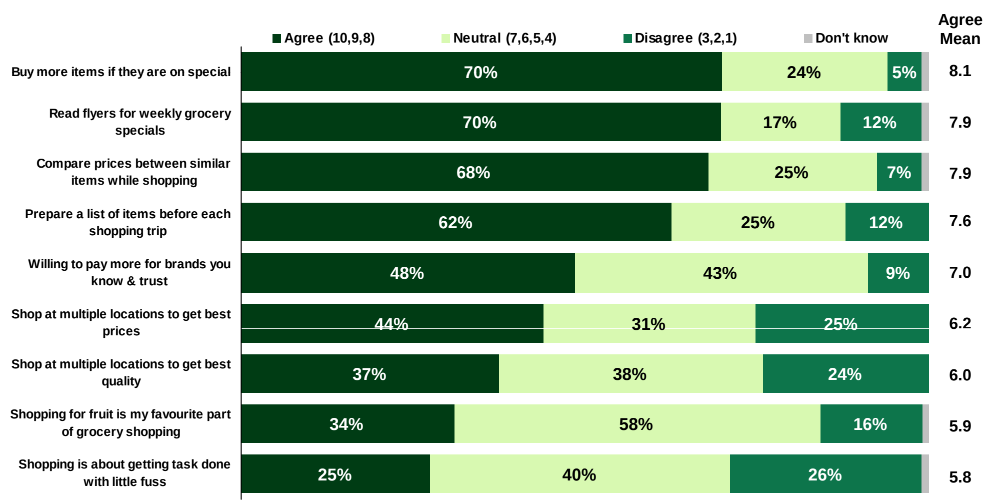
Mentions less than 5% are not labelled

Q26. Please indicate the degree to which you agree or disagree with each statement using a scale from 1 to 10 where 1 represents 'Strongly Disagree' and 10 represents 'Strongly Agree'. Base: All respondents n=1139

Statements Related to Shopping Process and Attitudes

All Respondents

When it comes to grocery shopping habits, many take a strategic approach by purchasing more items if they are on special, reading flyers for specials, comparing prices between similar items, and preparing a list before each trip.



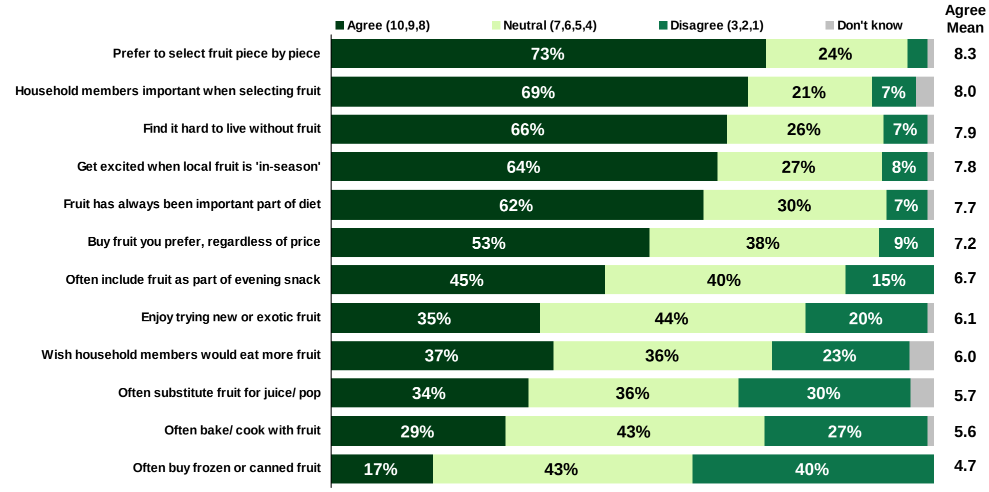
Mentions less than 6% are not labelled

Q26. Please indicate the degree to which you agree or disagree with each statement using a scale from 1 to 10 where 1 represents 'Strongly Disagree' and 10 represents 'Strongly Agree'. Base: Respondents in the "Apples Cell" n=178

Statements Related Toward Fresh Fruit and Diet

All Respondents

When purchasing fruit respondents prefer to of purchasing fruit piece by piece and consider the needs other household members when making their selections. Many respondents are quite passionate about fruit and say they would find it hard to live without it, claim that fruit has always been an important part of their diet, they are excited when local fruit is ‘in-season’ and they buy the fruit they want regardless of price.



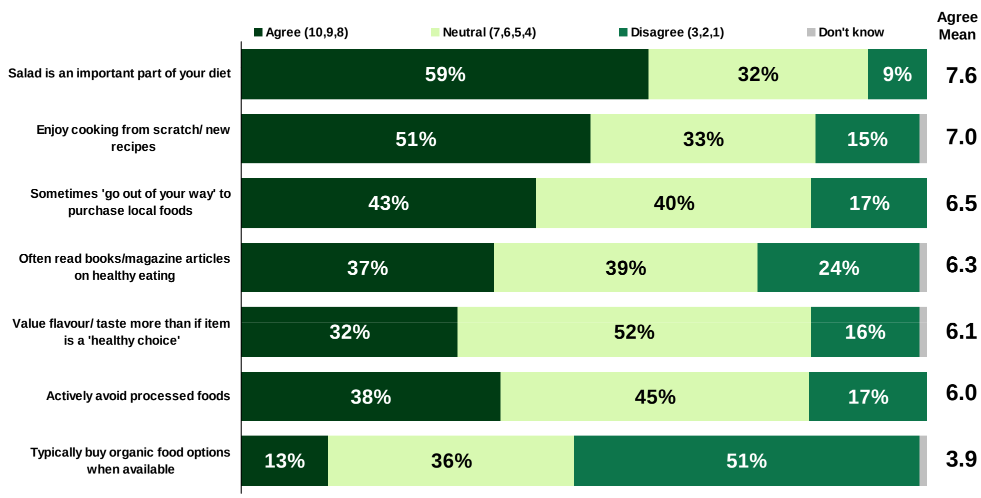
Mentions less than 6% are not labelled

Q26. Please indicate the degree to which you agree or disagree with each statement using a scale from 1 to 10 where 1 represents 'Strongly Disagree' and 10 represents 'Strongly Agree'. Base: All respondents n=1139

Statements Related Toward Lifestyle

All Respondents

Many fruit consumers say salad is an important part of their diet and half enjoy cooking from scratch and enjoy trying new recipes. Only two-in-five say they go out of their way to purchase locally grown foods often read literature on healthy eating, and/or actively avoids processed foods.



Mentions less than 6% are not labelled

Q26. Please indicate the degree to which you agree or disagree with each statement using a scale from 1 to 10 where 1 represents 'Strongly Disagree' and 10 represents 'Strongly Agree'. Base: All respondents n=1139

Segmentation

May 2009

Nobody's Unpredictable

Segmentation Overview

May 2009

Nobody's Unpredictable

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.

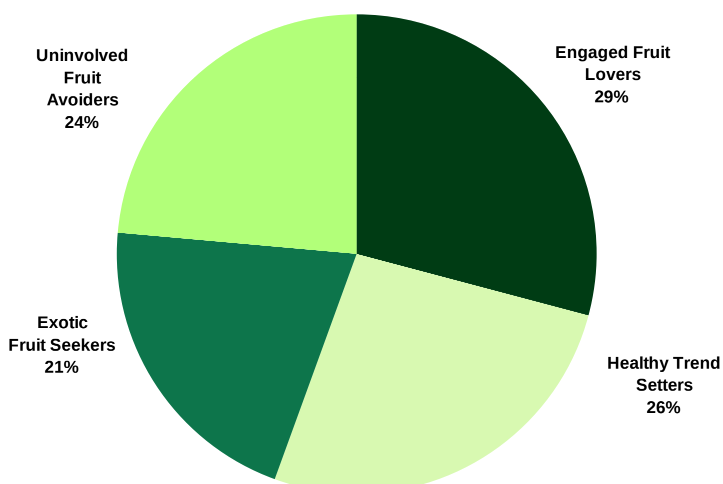
Respondents were classified into four clusters or groups taking into consideration the following:

- **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.

Segment Sizes

All Respondents



Distinguishing Segment Factors

	Engaged Fruit Lovers n=330	Healthy Trend Setters n=299	Exotic Fruit Seekers n=235	Uninvolved Fruit Avoiders n=268
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.

Segment Demographics

All Respondents

	Engaged Fruit Lovers A n=330 %	Healthy Trend Setters B n=299 %	Exotic Fruit Seekers C n=235 %	Uninvolved Fruit Avoiders D n=268 %
Gender				
Male	44	38	36	55 ABC
Female	56 D	62 D	64 D	45
Age				
18 to 24	2	3	6 A	5
25 to 34	9	9	12	12
35 to 44	20	22	31 AB	25
45 to 54	19	20	17	22
55 to 64	18	16	14	17
65+	31 CD	29 CD	20	19
Mean Age	*52 years CD*	*51 years CD*	*47 years*	*48 years*
Immigration Status				
Canadian Born	84 C	89 C	77	90
Established Canadian	91	95	82	80
Transitioning Canadian	8	5	7	16
New Canadian	2	-	11	4
Mean Years in Canada	*37 C*	*42 C*	29	35

Segment Demographics

All Respondents

	Engaged Fruit Lovers A n=330 %	Healthy Trend Setters B n=299 %	Exotic Fruit Seekers C n=235 %	Uninvolved Fruit Avoiders D n=268 %
Country of Origin (Country Only Shown if it Represents 4%+ of Total)				
	n=52	n=34	n=55	n=26
United Kingdom	41 C	49 C	21	50
United States	4	8	9	15
The Netherlands	4	11	5	-
Germany	2	12	3	-
Italy	2	8	3	4
Region				
East Central ON	16	17	18	15
Western Toronto Suburbs	20 BD	12	15	13
Toronto	12	12	21 ABD	14
Eastern ON	11	10	11	11
South Western ON	10	11	11	8
South East ON	10 C	7	4	9 C
West Central ON	6	10 C	4	9 C
South Central ON	5	9 A	5	8
Northern ON	5	7	7	8
Eastern Toronto Suburbs	6	5	6	6

Segment Demographics

All Respondents

	Engaged Fruit Lovers A n=330 %	Healthy Trend Setters B n=299 %	Exotic Fruit Seekers C n=235 %	Uninvolved Fruit Avoiders D n=268 %
Marital Status				
Single	9	13	14	14
Married	68 D	60	60	52
Domestic Partnership	9	10	12	19 ABC
Widowed/ Divorced/ Separated	14	17	14	14
# of Kids in Household				
0	70	77 C	67	72
1	15	11	14	14
2	11	9	12	8
3+	4	3	7 B	6 B
Employment Status				
Full-Time	31	34	42 AB	44 AB
Part-Time	9	8	11	10
Self-Employed	8	8	8	5
Homemaker	9	8	11	8
Student	2	3	2	3
Retired	32 CD	31 CD	20	22
Unemployed	5	6	5	6
Other	5 C	3	1	2

Segment Demographics

All Respondents

	Engaged Fruit Lovers n=330 %	Healthy Trend Setters n=299 %	Exotic Fruit Seekers n=235 %	Uninvolved Fruit Avoiders n=268 %
Household Income				
Less than $25,000	12	14	11	10
$25,000 to less than $40,000	10	11	12	15
$40,000 to less than $60,000	21	15	18	19
$60,000 to less than $80,000	18	20	18	23
$80,000 to less than $100,000	16	13	17	11
$100,000 to less than $150,000	20	20	16	17
$150,000or More	4	8 A	8 A	8
Mean Household Income	*$73,873*	*$76,595*	*$75,238*	*$71,085*
Education				
High school or less	31	33	30	35
Some college	24	23	27	28
College graduate	17 BD	11	17	11
Some university	18	21	16	16
University graduate	10	11	11	9
No Answer	1	1	-	1
Household Home Equity				
Rent	18	21	25	28
Own	78	75	69	69

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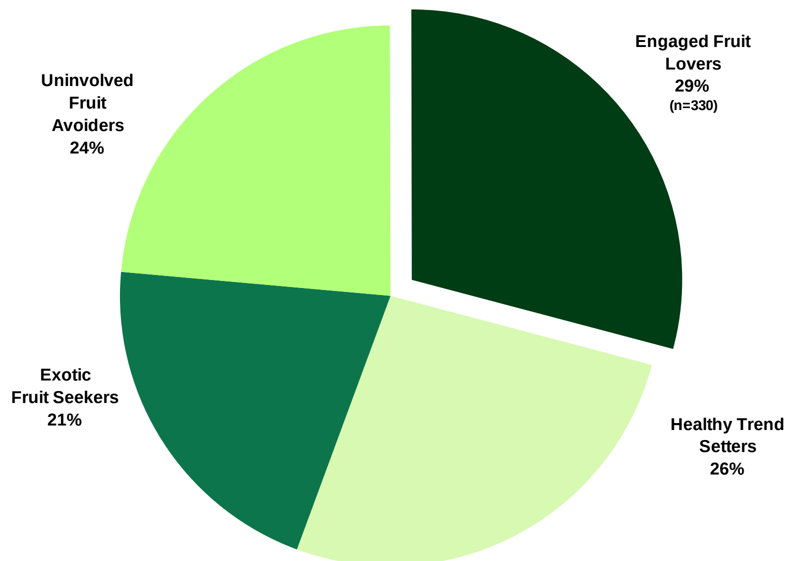
Segmentation

- ENGAGED FRUIT LOVERS -

May 2009

Nobody's Unpredictable

Segment Summary: *Engaged Fruit Lovers*



Segment Summary: *Engaged Fruit Lovers*

Engaged Fruit Lovers, 29%

Very high involvement with fruit.
Pro-Ontario and supportive of local producers.
High volume of fruit purchases during winter months.
High expenditure on food overall and second highest on fruit.
High volume of fruit purchases during winter months.
Associates Ontario fruit with freshness, best taste, consistent quality, and texture.
Highly engaged shopper and enjoys shopping for fruit.
Fruit plays a very active role in diet.
Majority of fresh whole-fruit purchased from large chain and discount grocery stores.
Key aspects of segment's demographic profile.

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.

- *Engaged Fruit Lovers,* enjoy a wide variety of fruits. More so than all other segments, they often or sometimes purchase:
  - Strawberries, 97% (others 84%),
  - Other berries, 91% (others 73%),
  - Pears, 84% (others 58%),
  - Peaches, 85% (others 56%),
  - Nectarines, 80% (others 48%)
  - Plums, 80% (others 44%), and
  - Cherries, 74% (others 41%).
- Most likely to say they have purchased Grapes (86%, others 66%) and Nectarines (27%, others 11%) during past four weeks (winter months).
- More likely to say they at least sometimes purchase apricots, 29% (others 13%).
- Most likely (39%) to say that shopping for fruit is their favourite part of grocery shopping (others 20%).
- Most likely to say they get excited when fruit is 'in-season', 83% (others 56%).

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.

Pro-Ontario and supportive of local producers.

- More likely to say they often or always look for the province or country of origin when they purchase:
  - Apples, 80% (others 44%),
  - Peaches, 73% (others 33%),
  - Pears, 71% (others 28%),
  - Grapes, 69% (others 32%),
  - Nectarines, 65% (others 24%), and
  - Plums, 64% (others 24%).
- More likely to say they...
  - do not buy the fruit they are looking for if Ontario options are not available (16%, Others 6%),
  - sometimes go out of their way to purchase locally produced foods (56%, others 48%), and
  - it is important to support Ontario farmers (45%, others 35%).
- Most likely to say that they associate "the highest quality fruit" with Ontario for all fruits:
  - Apples, 88% (others 60%),
  - Peaches, 84% (others 50%),
  - Pears, 74% (others 34%),
  - Plums, 68% (others 23%),
  - Nectarines, 53% (others 17%), and
  - Grapes, 46% (others 21%).

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.

Pro-Ontario and supportive of local producers.

High volume of fruit purchases during winter months.

- Average winter month purchase volume for key Ontario fruits are higher than average:

  - Apples, 18 pieces (other mean 17.6),
  - Pears, 6.7 pieces (other mean 4.0),
  - Clusters of Grapes, 5.7 (other mean 4.0),
  - Nectarines, 5.3 pieces (other mean 2.9),
  - Peaches, 3.5 pieces (other mean 1.7), and
  - Plums, 5.0 pieces (other mean 2.3).

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.

Pro-Ontario and supportive of local producers.

High volume of fruit purchases during winter months.

High expenditure on food overall and second highest on fruit.

- This segment purchases an above average amount on food overall in a typical month, $449 (others $422).
- Spending approximately $81 in a typical month on fresh whole-fruit, *Engaged Fruit Lovers* spend the second largest amount on fruit in a typical month (others $70).

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.

Pro-Ontario and supportive of local producers.

High volume of fruit purchases during winter months.

High expenditure on food overall and second highest on fruit.

Greater number fruit purchases in summer months.

- On average, this segment purchases above average volumes of fruit in both summer and winter:

Fruit Type	NET Increase (# of pieces)		Winter Months (# of pieces)		Typical Aug / Sept (# of pieces)	
	SEGMENT	'OTHERS'	SEGMENT	'OTHERS'	SEGMENT	'OTHERS'
Peaches	**18.2**↑	**13.6**	3.5	1.7	21.7	15.3
Plums	**10.5**↑	**9.1**	5.0	2.3	15.5	11.4
Apples	**10.1**↑	**7.1**	18.0	17.6	28.1	24.7
Nectarines	**9.2**↑	**7.8**	5.3	2.9	14.5	10.7
Pears	**8.3**↑	**7.2**	6.7	4.0	15.0	11.2
Clusters of Grapes	**3.0**↑	**2.8**	5.7	4.7	8.7	7.5

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.

Pro-Ontario and supportive of local producers.

High volume of fruit purchases during winter months.

High expenditure on food overall and second highest on fruit.

Greater number fruit purchases in summer months.

Associates Ontario fruit with freshness, best taste, consistent quality, and texture.

- More so than any other segment, 57% of this segment <u>strongly</u> associates Ontario with best taste (others 31%).
- More likely to say to they associate Ontario with...
  - Freshest, 82% (others 57%),
  - Best taste, 80% (others 48%),
  - Highest consistent quality, 75% (others 43%), and
  - Best texture, 72% (others 30%).

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.
Pro-Ontario and supportive of local producers.
High volume of fruit purchases during winter months.
High expenditure on food overall and second highest on fruit.
Greater number fruit purchases in summer months.
Associates Ontario fruit with freshness, best taste, consistent quality, and texture.
Highly engaged shopper and enjoys shopping for fruit.

- Least likely to view shopping as a task they want done with "as little fuss as possible", 24% (others 37%).
- Most likely to say they...
  - ...typically read flyers for weekly grocery specials, 84% (others 65%),
  - ...frequently compare prices between similar items while shopping, 84% (others 62%),
  - ...prefer to select fruit piece by piece, 84% (others 68%),
  - ...consider the needs of other household members when purchasing fruit, 80% (others 65%), and
  - ...find shopping for fruit their favourite part of grocery shopping, 39% (others 20%).
- Most likely to say they stop at a grocery store to pick up fresh whole-fruit to eat as a snack or meal 'on-the-go', 34% 5+ times per month (others 22%).

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.
Pro-Ontario and supportive of local producers.
High volume of fruit purchases during winter months.
High expenditure on food overall and second highest on fruit.
Greater number fruit purchases in summer months.
Associates Ontario fruit with freshness, best taste, consistent quality, and texture.
Highly engaged shopper and enjoys shopping for fruit.
Fruit plays a very active role in diet.

- Most likely to say...
  - ...they would find it hard to live without fruit, 83% (others 59%), and
  - ...fruit has always been an important part of their diet, 80% (others 55%).

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.
Pro-Ontario and supportive of local producers.
High volume of fruit purchases during winter months.
High expenditure on food overall and second highest on fruit.
Greater number fruit purchases in summer months.
Associates Ontario fruit with freshness, best taste, consistent quality, and texture.
Highly engaged shopper and enjoys shopping for fruit.
Fruit plays a very active role in diet.
Majority of fresh whole-fruit purchased from large chain and discount grocery stores.

- *Engaged Fruit Lovers* purchase their fresh whole-fruit from large chain (44%, others 43) and discount grocery stores (41%, others 42%).

Segment Summary: *Engaged Fruit Lovers*

Very high involvement with fruit.
Pro-Ontario and supportive of local producers.
High volume of fruit purchases during winter months.
High expenditure on food overall and second highest on fruit.
Greater number fruit purchases in summer months.
Associates Ontario fruit with freshness, best taste, consistent quality, and texture.
Highly engaged shopper and enjoys shopping for fruit.
Fruit plays a very active role in diet.
Majority of fresh whole-fruit purchased from large chain and discount grocery stores.

Key aspects of segment's demographic profile.

- Gender:
  - Female, 56% (others 57%),
  - Male, 44% (others 43%).
- Employment:
  - Retired, 32% (others 24%),
  - Employed full-time, 31% (others 40%).
- Age:
  - 35 to 54 years, 39% (others 46%)
  - 55 to 64 years, 18% (others 16%)
  - 65 years or older, 31% (others 23%),
  - Average age, 52 years (others 48 years).
- Kids in Household:
  - None, 70% (others 72%),
  - One, 15% (others 13%).
- Average Income, $73,873 (others $74,306).
- Married, 68% (others 57%).
- Born in Canada, 84% (others 85%).
- Completed Education Level:
  - Graduated High School, 23% (others 25%),
  - Some College/ CEGEP/ Trade School, 24% (others 26%),
  - Graduated College/ CEGEP/ Trade School, 17% (others 13%),
  - Some University, 18% (others 17%).

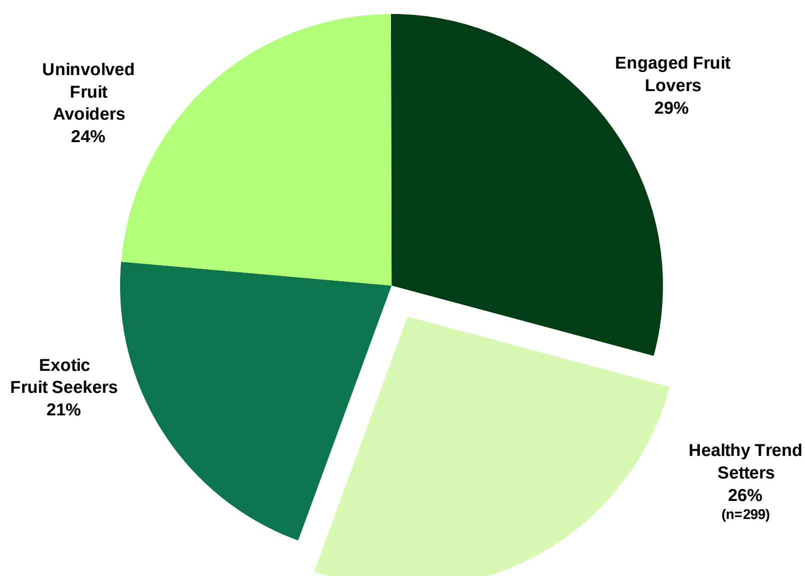
Segmentation

- HEALTHY TREND SETTERS -

May 2009

Nobody's Unpredictable

Segment Summary: *Healthy Trend Setters*



Segment Summary: *Healthy Trend Setters*

Healthy Trend Setters, 26%

Average involvement with fruit.

Pro-Ontario and supportive of local producers.

Average volume of Apples, less for other fruits.

Average expenditure on food overall and fruit.

Much higher purchases of peaches in summer months.

Associates Ontario fruit with being the freshest, best tasting, consistent quality, best texture, and best appearance.

Low engagement in terms of shopping but price is not a barrier.

Actively avoids processed foods and prefers organic.

Majority of fresh whole-fruit purchased from large chains and least likely from discount grocery stores.

Key aspects of segment's demographic profile.

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.

- In the last 4 weeks (a winter month), *Healthy Trend Setters* segment have purchased average amounts most fruits listed and significantly more Apples (92%) than the *Engaged Fruit Lovers* (86%).
- *Healthy Trend Setters* say they often or sometimes purchase:
  - Apples, 98% (others 97%),
  - Bananas, 95% (others 95%),
  - Citrus fruits, 93% (others 92%),
  - Grapes, 92% (others 92%),
  - Strawberries, 89% (others 87%),
  - Melons/Watermelons/Cantaloupes, 77% (others 73%),
  - Pears, 62% (others 65%),
  - Peaches, 64% (others 63%),
  - Nectarines, 47% (others 59%), and
  - Plums, 42% (others 56%).

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.

Pro-Ontario and supportive of local producers.

- Are more likely to say they always or often look for the province or country of origin when they purchase the following fruit types:
  - Apples, 82% (others 44%)
  - Peaches, 74% (others 33%)
  - Grapes, 68% (others 32%)
  - Pears, 65% (others 28%)
  - Plums, 62% (others 24%), and
  - Nectarines, 60% (others 24%).
- Individuals in this segment, are much more likely to say they do not buy fruit they are looking for if Ontario options are not available, 19% (others 6%).
- Most likely to say a very important reason for purchasing Ontario fruit is to support local and Ontario farmers, 59% (others, 35%).
- Likely to say an important reason to purchase local Ontario fruit is that it is better for the environment due to less 'Food Miles', 20% (others, 12%).
- Over half (60%) say they sometimes go out of their way to purchase locally produced foods (others 35%).

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.

Pro-Ontario and supportive of local producers.

Average volume of Apples, less for other fruits.

- Winter consumption of apples is on par with other segments, however, all other categories are lower.

Fruit Type	Winter Fruit Volume (# of pieces)		
	NET DIFFERENCE	SEGMENT	'OTHERS'
Nectarines	-3.2 ↓	1.1	4.3
Plums	-2.5 ↓	1.1	3.6
Pears	-1.9 ↓	3.2	5.1
Peaches	-1.7 ↓	0.9	2.6
Clusters of Grapes	-1.1 ↓	3.6	4.7
Apples	0.9 ↑	18.5	17.6

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.

Pro-Ontario and supportive of local producers.

Average volume of Apples, less for other fruits.

Average expenditure on food overall and fruit.

- In a typical month this segment spends an average amount on food, $437 (others $434).
- Expenditure on fresh whole-fruit is average for this segment as well, $70 (others, $74).

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.

Pro-Ontario and supportive of local producers.

Average volume of Apples, less for other fruits.

Average expenditure on food overall and fruit.

Much higher purchases of peaches in summer months.

- Seasonality drives consumption with this segment more than others:

Fruit Type	NET Increase (# of pieces)		Winter Months (# of pieces)		Typical Aug / Sept (# of pieces)	
	SEGMENT	'OTHERS'	SEGMENT	'OTHERS'	SEGMENT	'OTHERS'
Peaches	**16.8** ↑	**12.7**	0.9	2.6	17.7	15.3
Plums	**9.9** ↑	**7.8**	1.1	3.6	11.0	11.4
Apples	**8.1** ↑	**7.1**	18.5	17.6	26.6	24.7
Nectarines	**8.0** ↑	**6.4**	1.1	4.3	9.1	10.7
Pears	**7.3** ↑	**6.1**	3.2	5.1	10.5	11.2
Clusters of Grapes	**2.1** ↓	**2.8**	3.6	4.7	5.7	7.5

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.

Pro-Ontario and supportive of local producers.

Average volume of Apples, less for other fruits.

Average expenditure on food overall and fruit.

Much higher purchases of peaches in summer months.

Associates Ontario fruit with being the freshest, best tasting, consistent quality, best texture, best appearance, and best value for money.

- More likely to associate Ontario fruit with...
  - Freshest, 82% (others 57%),
  - Best taste, 75% (others 48%),
  - Highest consistent quality, 70% (others 43%),
  - Best texture, 69% (others 40%),
  - Best appearance, 67% (others 39%), and
  - Best value for money, 65% (others 39%).

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.

Pro-Ontario and supportive of local producers.

Average volume of Apples, less for other fruits.

Average expenditure on food overall and fruit.

Much higher purchases of peaches in summer months.

Associates Ontario fruit with being the freshest, best tasting, consistent quality, best texture, best appearance, and best value for money.

Low engagement in terms of shopping but price is not a barrier.

- Most likely to say that they are willing to pay a premium for Ontario fruit when it is available, 60% (others 31%).
- When it comes to shopping behaviour, this segment is least likely to say that they...
  - ...frequently compare prices between similar items while shopping, 52% (other 73%),
  - ...typically buy more items if they are on special, 51% (others 76%),
  - ...typically read flyers for weekly grocery specials, 50% (other 76%), and
  - ...will shop at multiple locations to ensure they get the best prices, 22% (other 51%).

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.
Pro-Ontario and supportive of local producers.
Average volume of Apples, less for other fruits.
Average expenditure on food overall and fruit.
Much higher purchases of peaches in summer months.
Associates Ontario fruit with being the freshest, best tasting, consistent quality, best texture, best appearance, and best value for money.
Low engagement in terms of shopping but price is not a barrier.
Actively avoids processed foods and prefers organic.

- More likely to avoid processed foods, 47% (others 34%).
- Prefers to buy organic food, 18% (others 11%).

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.
Pro-Ontario and supportive of local producers.
Average volume of Apples, less for other fruits.
Average expenditure on food overall and fruit.
Much higher purchases of peaches in summer months.
Associates Ontario fruit with being the freshest, best tasting, consistent quality, best texture, best appearance, and best value for money.
Low engagement in terms of shopping but price is not a barrier.
Actively avoids processed foods and prefers organic.

Majority of fresh whole-fruit purchased from large chains and least likely from discount grocery stores.

- *Healthy Trend Setters* purchase their fresh whole-fruit from large chain (48%, others 42%) and are less likely to purchase from discount grocery stores (31%, others 42%).

Segment Summary: *Healthy Trend Setters*

Average involvement with fruit.
Pro-Ontario and supportive of local producers.
Average volume of Apples, less for other fruits.
Average expenditure on food overall and fruit.
Much higher purchases of peaches in summer months.
Associates Ontario fruit with being the freshest, best tasting, consistent quality, best texture, best appearance, and best value for money.
Low engagement in terms of shopping but price is not a barrier.
Actively avoids processed foods and prefers organic.
Majority of fresh whole-fruit purchased from large chains and least likely from discount grocery stores.
Key aspects of segment's demographic profile.

- Gender:
  - Female, 62% (others 55%),
  - Male, 38% (others 45%).
- Employment:
  - Retired, 31% (others 24%),
  - Employed full-time, 34% (others 39%).
- Age:
  - 35 to 54 years, 42% (others 45%)
  - 55 to 64 years, 16% (others 16%)
  - 65 years or older, 29% (others 23%),
  - Average age, 51 years (others 49 years).
- Kids in Household:
  - None, 77% (others 70%),
  - One, 11% (others 14%).
- Average Income, $76,595 (others $73,399).
- Married, 60% (others 60%).
- Born in Canada, 89% (others 84%).
- Completed Education Level:
  - Graduated High School, 27% (others 24%),
  - Some College/ CEGEP/ Trade School, 23% (others 27%),
  - Some University, 21% (others 16%), and
  - Graduated College/ CEGEP/ Trade School, 11% (others 15%),

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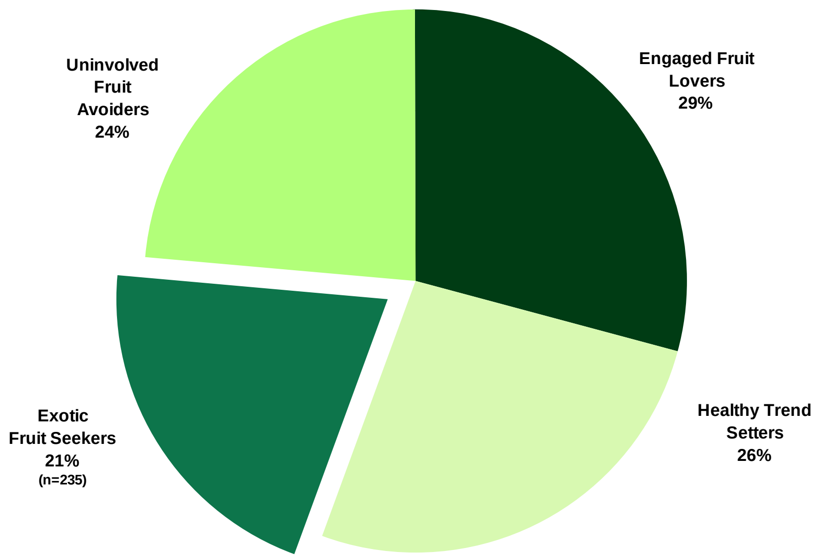
Segmentation

- EXOTIC FRUIT SEEKERS -

May 2009

Nobody's Unpredictable

Segment Summary: *Exotic Fruit Seekers*



Segment Summary: *Exotic Fruit Seekers*

Exotic Fruit Seekers, 21%

- Most involved with diverse spectrum of fruit, especially exotics.
- High volume of a variety of fruits but less on grapes.
- High expenditure on food overall and highest on fruit.
- Seasons do not have a big impact on fruit purchases.
- Least likely to associate "the highest quality fruits" with Ontario.
- Unlikely to associate positive attributes with Ontario produced fruit
- Average level of engagement towards grocery shopping.
- Actively avoids processed foods and read literature about healthy eating.
- Discount and large chain food retailers are where consumers purchase fruit.
- Key aspects of segment's demographic profile.

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.

- *Exotic Fruit Seekers* say they often or sometimes purchase a variety of fruits, some of which are less traditional or exotic:
  - Citrus fruits, 98% (others 91%),
  - Bananas, 97% (others 94%),
  - Strawberries, 93% (others 86%),
  - Other berries, 85% (others 75%),
  - Melons/ Watermelons/ Cantaloupes, 83% (others 71%),
  - Other tropical or exotic fruits, 66% (others 44%),
  - Cherries, 55% (others 48%), and
  - Apricots, 26% (others 13%).
- *Exotic Fruit Seekers* say they enjoy trying new or exotic fruits, 51% (others 29%).

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.

High volume of a variety of fruits.

- In the winter months, purchase volume of a variety of fruits that can be grown in Ontario have been much higher than average for this segment:
  - Apples, 20.7 pieces (other mean 16.7),
  - Pears, 6.8 pieces (other mean 3.9),
  - Nectarines, 6.0 pieces (other mean 2.7),
  - Clusters of Grapes, 5.4 (other mean 4.1),
  - Plums, 4.7 pieces (other mean 2.4), and
  - Peaches, 3.4 pieces (other mean 1.7).

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.

High volume of a variety of fruits.

High expenditure on food overall and highest on fruit.

- Expenditure on food overall in a typical month is above average, $450 (others $430).
- Highest expenditure on fresh whole-fruit in a typical month, $94 (others $74).

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.

High volume of a variety of fruits.

High expenditure on food overall and highest on fruit.

Seasons do not have a big impact on fruit purchases.

- Although this segment increases its consumption in summer, the increase is not as significant as other segments.

Fruit Type	NET Increase (# of pieces)		Winter Months (# of pieces)		Typical Aug / Sept (# of pieces)	
	SEGMENT	'OTHERS'	SEGMENT	'OTHERS'	SEGMENT	'OTHERS'
Peaches	**10.6** ↓	**14.9**	3.4	1.7	14.0	16.6
Plums	**7.5** ↓	**8.6**	4.7	2.4	12.2	11.0
Nectarines	**5.7** ↓	**7.2**	6.0	2.7	11.7	9.9
Pears	**5.5** ↓	**6.7**	6.8	3.9	12.3	10.6
Apples	**5.3** ↓	**8.2**	20.7	16.7	26.0	24.9
Clusters of Grapes	**3.7** ↓	**2.3**	5.4	4.1	9.1	6.4

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.

High volume of a variety of fruits.

High expenditure on food overall and highest on fruit.

Seasons do not have a big impact on fruit purchases.

Least likely to associate “the highest quality fruits” with Ontario.

- Least likely to associate “highest quality fruits” with Ontario:
  - Apples, 39% (other 76%),
  - Peaches, 24% (other 70%),
  - Pears, 11% (other 55%),
  - Grapes, 7% (other 34%),
  - Nectarines, 5% (other 33%), and
  - Plums, 3% (other 45%).

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.

High volume of a variety of fruits.

High expenditure on food overall and highest on fruit.

Seasons do not have a big impact on fruit purchases.

Least likely to associate “the highest quality fruits” with Ontario.

Unlikely to associate positive attributes with Ontario produced fruit.

- For all fruit attributes, this segment is <u>least</u> likely to associate them with Ontario produced fruit:
  - Freshest, 56% (other 74%),
  - Best taste, 45% (other 68%),
  - Longest after-purchase shelf life, 40% (other 59%),
  - Best texture, 39% (other 61%),
  - Highest consistency in quality, 38% (other 64%),
  - Best appearance, 38% (other 59%),
  - Best value for money, 37% (other 56%),
  - Lowest price, 33% (other 42%),
  - Most convenient packaging, 29% (other 48%),
  - Most convenient to eat 'on-the-go', 28% (other 44%),
  - Highest nutritional value, 27% (other 48%), and
  - Always available all year round, 15% (other 17%).

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.
High volume of a variety of fruits.
High expenditure on food overall and highest on fruit.
Seasons do not have a big impact on fruit purchases.
Least likely to associate "the highest quality fruits" with Ontario.
Unlikely to associate positive attributes with Ontario produced fruit.
Average level of engagement towards grocery shopping.

- More likely to say they are willing to shop at multiple locations the best quality, 47% (others 27%).
- *Exotic Fruit Seekers* are about average for nearly all "shopping measures":
  - Typically read flyers for weekly grocery specials , 73% (others 69%),
  - Typically buy more items if they are on special, 71% (others 69%),
  - Frequently compare prices between similar items while shopping, 67% (others 68%),
  - Prepare a list of items before each shopping trip, 60% (others 62%),
  - Shop at multiple locations to ensure you get the best prices, 50% (others 42%),
  - Willing to pay more for brands you know and trust, 49% (others 48%),
  - Shop at multiple locations to ensure you get the best quality, 45% (others 35%),
  - Shopping is just about getting the task done with as little fuss as possible, 40% (others 32%), and
  - Shopping for fruit is my favourite part of grocery shopping, 29% (others 23%).

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.
High volume of a variety of fruits.
High expenditure on food overall and highest on fruit.
Seasons do not have a big impact on fruit purchases.
Least likely to associate "the highest quality fruits" with Ontario.
Unlikely to associate positive attributes with Ontario produced fruit.
Average level of engagement towards grocery shopping.
Actively avoids processed foods and reads literature about healthy eating.

- More likely to say salad is important part of diet, 40% (others 36%).
- Often reads books or magazines about 'healthy eating', 43% (others 34%)
- Enjoys cooking from scratch, 59% (others 48%).
- Actively avoids processed foods.

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.
High volume of a variety of fruits.
High expenditure on food overall and highest on fruit.
Seasons do not have a big impact on fruit purchases.
Least likely to associate "the highest quality fruits" with Ontario.
Unlikely to associate positive attributes with Ontario produced fruit.
Average level of engagement towards grocery shopping.
Actively avoids processed foods and reads literature about healthy eating.
Discount and large chain food retailers are where consumers purchase fruit.

- *Exotic Fruit Seekers* purchase their fresh whole-fruit from discount (47%, others 45%) and large chain (41%, others 44%).

Segment Summary: *Exotic Fruit Seekers*

Most involved with diverse spectrum of fruit, especially exotics.
High volume of a variety of fruits.
High expenditure on food overall and highest on fruit.
Seasons do not have a big impact on fruit purchases.
Least likely to associate "the highest quality fruits" with Ontario.
Unlikely to associate positive attributes with Ontario produced fruit.
Average level of engagement towards grocery shopping.
Actively avoids processed foods and reads literature about healthy eating.
Discount and large chain food retailers are where consumers purchase fruit.
Key aspects of segment's demographic profile.

- Gender:
  - Female, 64% (others 54%),
  - Male, 36% (others 46%).
- Employment:
  - Employed full-time, 42% (others 36%),
  - Retired, 20% (others 28%).
- Age:
  - 35 to 54 years, 48% (others 43%)
  - 55 to 64 years, 14% (others 17%)
  - 65 years or older, 20% (others 27%),
  - Average age, 47 years (others 50 years).
- Average Income, $75,238 (others $73,851).
- Kids in Household:
  - None, 67% (others 73%),
  - One, 14% (others 13%).
- Marital Status:
  - Married, 60% (others 60%),
  - Domestic Partnership, 12% (others 12%).
- Born in Canada, 77% (others 88%).
- Completed Education Level:
  - Graduated High School, 24% (others 25%),
  - Some College/ CEGEP/ Trade School, 27% (others 25%),
  - Graduated College/ CEGEP/ Trade School, 17% (others 13%),
  - Some University, 16% (others 18%).

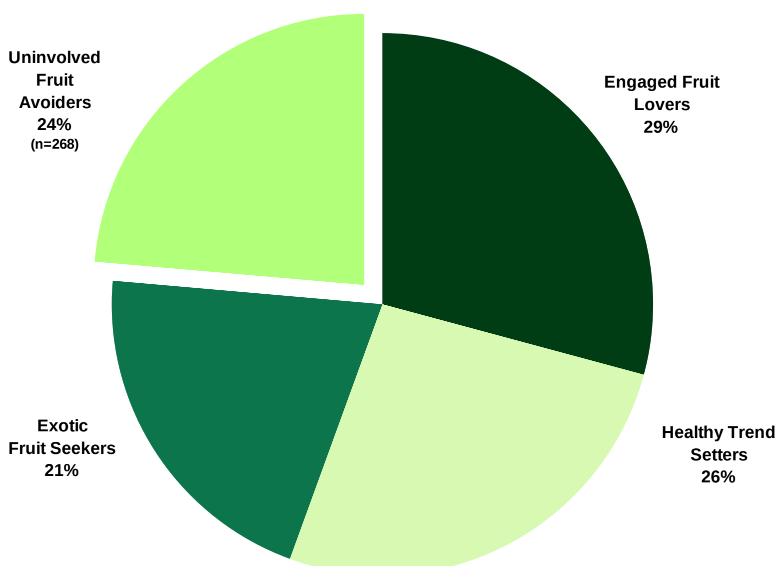
Segmentation

- UNINVOLVED FRUIT AVOIDERS -

May 2009

Nobody's Unpredictable

Segment Summary: *Uninvolved Fruit Avoiders*



Segment Summary: *Uninvolved Fruit Avoiders*

Uninvolved Fruit Avoiders, 24%

Very uninvolved with fruit.
Average volume of apples but low on all others.
Lowest expenditure on food purchases including fruit.
Seasons do not impact fruit purchases.
Unlikely to associate fruit attributes with Ontario fruit.
Unengaged shopper.
Fruit is not an active part of lifestyle.
Fresh whole-fruit is purchased most often from discount and large chain grocery stores.
Key aspects of segment's demographic profile.

Segment Summary: *Uninvolved Fruit Avoiders*

Very uninvolved with fruit.

- This segment is less likely to say they purchased most fruits during the past four weeks (winter month):
  - Bananas, 79% (others 91%),
  - Grapes, 56% (others 76%),
  - Citrus fruits, 51% (others 76%),
  - Strawberries, 44% (others 66%),
  - Melons/ Watermelons/ Cantaloupes, 19% (others 40%),
  - Other berries, 21% (others 47%), and
  - Other tropical or exotic fruits, 8% (others 33%).
- With the exception of the purchasing of Apples, this segment is the least likely to say they at least sometimes purchase any of the fruits on the list provided to them.
- *Uninvolved Fruit Avoiders* are also the least likely to say that shopping for fruit is their favourite part of grocery shopping, 5% (others 31%).
- Least likely to say that they sometimes or often look for the country of origin for all fruits:
  - Apples, 41% (others 69%),
  - Peaches, 31% (others 61%),
  - Grapes, 27% (others 58%),
  - Pears, 24% (others 56%),
  - Plums, 22% (others 51%), and
  - Nectarines, 18% (others 51%).
- Similar to the *Exotic Fruit Seekers*, this segment is less likely feel that supporting local farmers is an important reason to purchase Ontario produced fruit, 36% (others 52%).

Segment Summary: *Uninvolved Fruit Avoiders*

Very uninvolved with fruit.

Average volume of apples but low on all others.

- Lowest purchase volumes of fruits that can be grown in Ontario:
  - Apples, 13.7 pieces (others 19.1),
  - Pears, 1.9 pieces (others 5.6),
  - Nectarines, 1.6 pieces (others 4.1),
  - Clusters of Grapes, 3.1 (others 4.9),
  - Plums, 1.2 pieces (others 3.6), and
  - Peaches, 0.8 pieces (others 2.6).
- Individuals in this segment, in a typical month, stop by the grocery store the fewest times to pick up fresh whole-fruit to eat as a snack or meal on-the-go, 2.7 (others 3.8).

Segment Summary: *Uninvolved Fruit Avoiders*

Very uninvolved with fruit.

Average volume of apples but low on all others.

Lowest expenditure on food purchases including fruit.

- Lowest expenditure on food purchases overall in a typical month, $403 (others $445).
- Amount spent in a typical month on fresh whole-fruit is exceptionally low for this segment compared to all others, $47 (others $82).

Segment Summary: *Uninvolved Fruit Avoiders*

Very uninvolved with fruit.

Average volume of apples but low on all others.

Lowest expenditure on food purchases including fruit.

Seasons do not impact fruit purchases.

- While on par with the increase in Peaches in August or September, there is very little change in purchasing patterns of fruits from the last four weeks to the summer months when fruit is 'in season'.

Fruit Type	NET Increase (# of pieces)		Winter Month (# of pieces)		Typical Aug / Sept (# of pieces)	
	SEGMENT	'OTHERS'	SEGMENT	'OTHERS'	SEGMENT	'OTHERS'
Peaches	**9.5** ↓	**15.2**	0.8	2.6	10.3	17.8
Apples	**6.3** ↓	**7.8**	13.7	19.1	20.0	26.9
Plums	**5.3** ↓	**9.3**	1.2	3.6	6.5	12.9
Nectarines	**4.4** ↓	**7.7**	1.6	4.1	6.0	11.8
Pears	**4.3** ↓	**7.0**	1.9	5.6	6.2	12.6
Clusters of Grapes	**1.7** ↓	**2.9**	3.1	4.9	4.8	7.8

Segment Summary: *Uninvolved Fruit Avoiders*

Very uninvolved with fruit.

Average volume of apples but low on all others.

Lowest expenditure on food purchases including fruit.

Seasons do not impact fruit purchases.

Unlikely to associate fruit attributes with Ontario fruit.

- A sizable portion of this segment say that an important reason to purchase Ontario produced fruit is that it is the freshest fruit, 69% (others 57%).
- Over half of this segments associates Ontario produced fruits being the freshest, 58% (others 73%) and approximately half associate Ontario produced fruit with:
  - Best taste, 50% (others 66%),
  - Highest consistent quality, 48% (others 61), and
  - Longest after purchase shelf life, 47% (others 56%).

Segment Summary: *Uninvolved Fruit Avoiders*

Very uninvolved with fruit.
Average volume of apples but low on all others.
Lowest expenditure on food purchases including fruit.
Seasons do not impact fruit purchases.
Unlikely to associate fruit attributes with Ontario fruit.
Unengaged shopper.

- Least likely to pay more for the brands they know and trust, 36% (others 52%).
- Least likely to agree that shopping for fruit is their favourite part of grocery shopping, 5% (others 31%).

Segment Summary: *Uninvolved Fruit Avoiders*

Very uninvolved with fruit.
Average volume of apples but low on all others.
Lowest expenditure on food purchases including fruit.
Seasons do not impact fruit purchases.
Unlikely to associate fruit attributes with Ontario fruit.
Unengaged shopper.
Fruit is not an active part of lifestyle.

- Least likely to agree that they...
  - ...think the needs of household members are important when buying fruit, 54% (others 73%),
  - ...get excited when local fruit is ‘in season’, 34% (others 72%),
  - ...would find it hard to live without fruit, 30% (others 76%),
  - ...think fruit has always been an important part of their diet, 26% (others 73%),
  - ...often include fruit as part of evening snack, 19% (others 53%),
  - ...often substitute fresh whole-fruit for juice/ pop, 15% (others 39%),
  - ...enjoy trying new or exotic fruit, 12% (others 42%), and
  - ...often bake or cook with fruit, 11% (others 34%).

Segment Summary: *Uninvolved Fruit Avoiders*

Very uninvolved with fruit.
Average volume of apples but low on all others.
Lowest expenditure on food purchases including fruit.
Seasons do not impact fruit purchases.
Unlikely to associate fruit attributes with Ontario fruit.
Unengaged shopper.
Fruit is not an active part of lifestyle.
Fresh whole-fruit is purchased most often from discount and large chain grocery stores.

- *Uninvolved Fruit Avoiders* are mostly likely to say they purchase fresh whole-fruit from discount grocery stores (49%, ,others 39%) and large chain stores (41%, others 44%).

Segment Summary: *Uninvolved Fruit Avoiders*

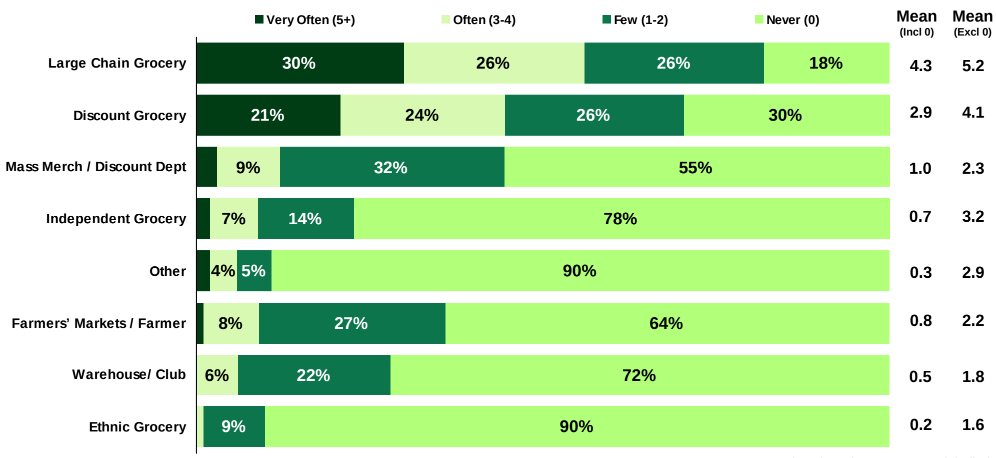
Very uninvolved with fruit.
Average volume of apples but low on all others.
Lowest expenditure on food purchases including fruit.
Seasons do not impact fruit purchases.
Unlikely to associate fruit attributes with Ontario fruit.
Unengaged shopper.
Fruit is not an active part of lifestyle.
Fresh whole-fruit is purchased most often from discount and large chain grocery stores.
Key aspects of segment's demographic profile.

- Gender:
  - Female, 45% (others 61%),
  - Male, 55% (others 39%).
- Employment:
  - Employed full-time, 44% (others 36%)
  - Retired, 22% (others 27%).
- Age:
  - 35 to 54 years, 47% (others 43%)
  - 55 to 64 years, 17% (others 16%)
  - 65 years or older, 19% (others 27%),
  - Average age, 48 years (others 50 years).
- Kids in Household:
  - None, 72% (others 71%),
  - One, 14% (others 14%).
- Average Income, $71,086 (others $75,235).
- Marital Status:
  - Married, 52% (others 63%),
  - Domestic Partnership, 19% (others 10%).
- Born in Canada, 90% (others 83%).
- Completed Education Level:
  - Graduated High School, 24% (others 24%),
  - Some College/ CEGEP/ Trade School, 28% (others 25%),
  - Graduated College/ CEGEP/ Trade School, 11% (others 15%),
  - Some University, 16% (others 18%).

Frequency of Shopping in Typical Month at Food Retail Locations

Engaged Fruit Lovers

Half of *Engaged Fruit Lovers* say they very often or often shop at large chain grocery (56%) or discount grocery (45%) stores. In a typical month they go to large chain grocery stores four times a month and the discount stores three times a month.



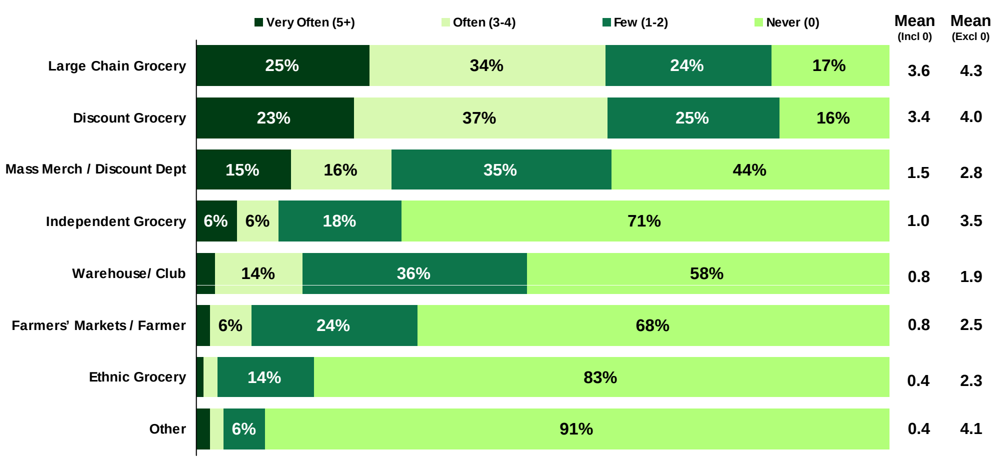
Mentions less than 5% are not labelled

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: All respondents n=1139

Frequency of Shopping in Typical Month at Food Retail Locations

Healthy Trend Setters

Healthy Trend Setters most often say they shop at large chain, and discount grocery stores, visiting each three to four times a month.



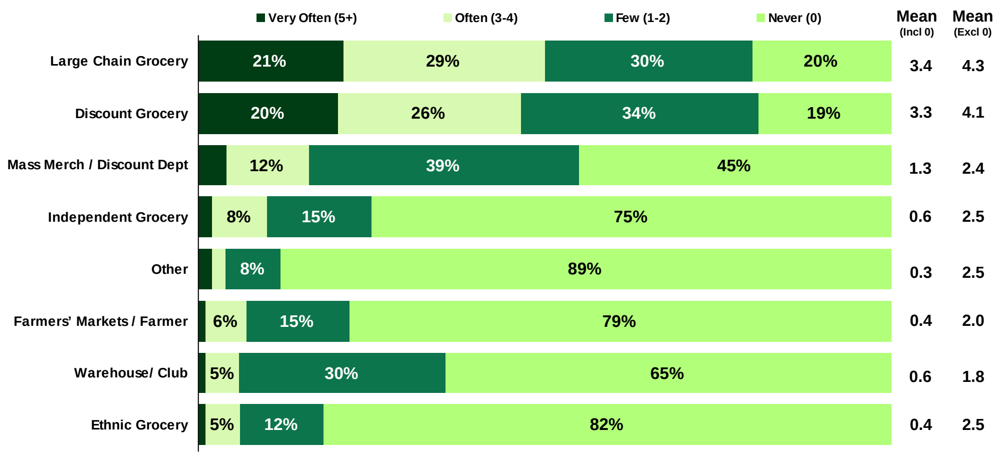
Mentions less than 5% are not labelled

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: All respondents n=1139

Frequency of Shopping in Typical Month at Food Retail Locations

Exotic Fruit Seekers

Like other segments, *Exotic Fruit Seekers* most often say they shop at large chain and discount grocery stores and typically go to each three to four times in a typical month.



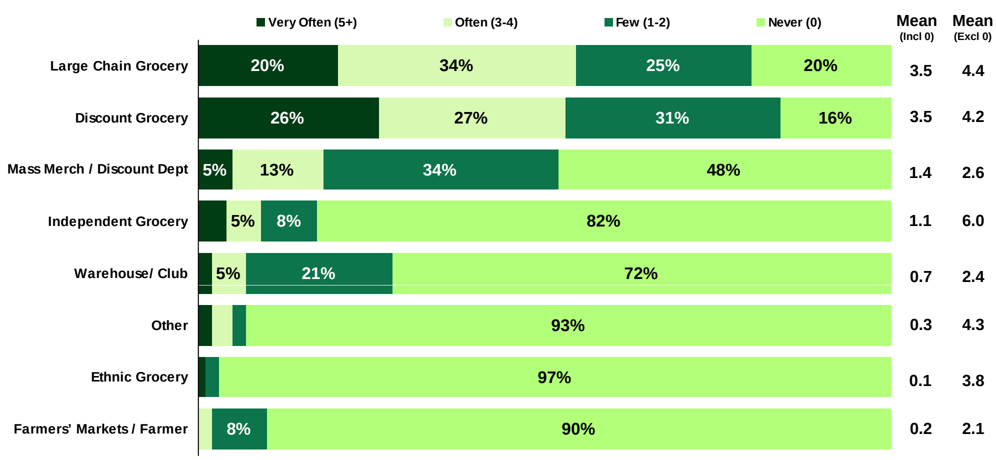
Mentions less than 5% are not labelled

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: All respondents n=1139

Frequency of Shopping in Typical Month at Food Retail Locations

Uninvolved Fruit Avoiders

Similar to segments more involved with fruit, *Uninvolved Fruit Avoiders* also most often hey shop at large chain and discount grocery stores and go three to four times a month.



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: All respondents n=1139

GEORGE MORRIS CENTRE

Segmentation Persuasion Staircase

May 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.

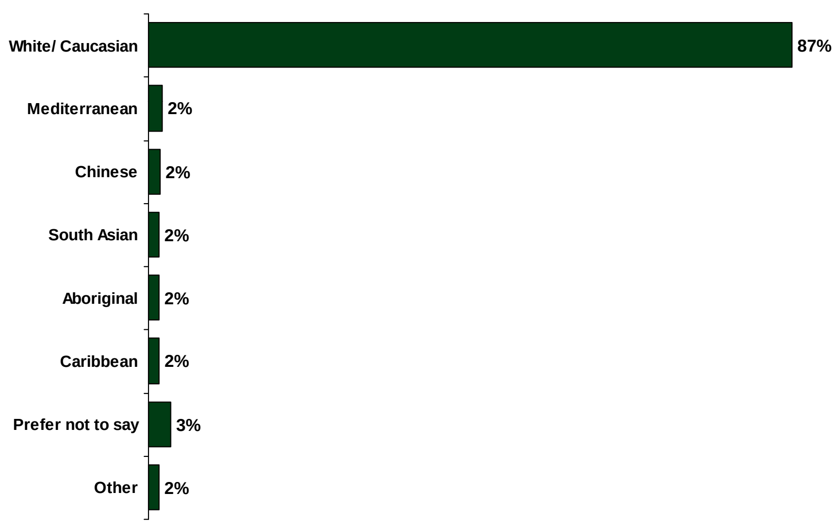
Demographics

May 2009

Nobody's Unpredictable

Ethnicity

All Respondents



QE1. People in Canada belong to many different ethnic and racial groups. In addition to being Canadian, which ethnic or racial group do you identify most with? Base: All Respondents n=1139

First Language

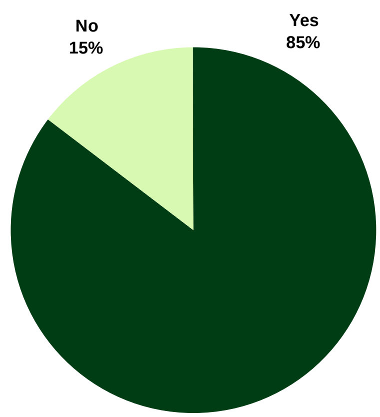
All Respondents

E2. Which language is your mother tongue - the first language that you learned at home in childhood and still understand today? Base: All Respondents n=1139

Canadian Born

All Respondents

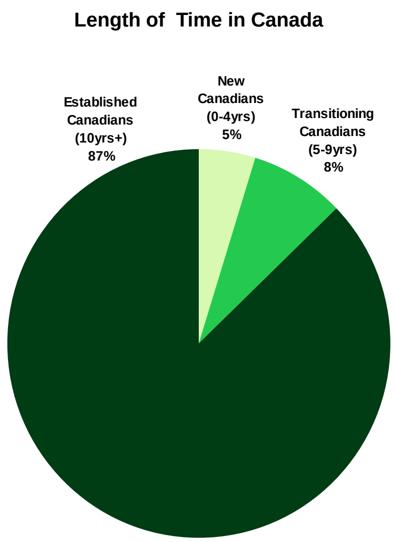
Were You Born in Canada?

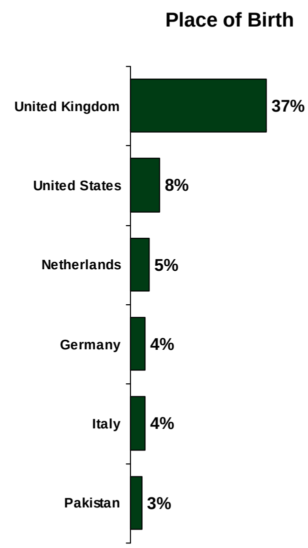


E3. Were you born in Canada? Base: All Respondents n=1139

Country of Birth

All Respondents

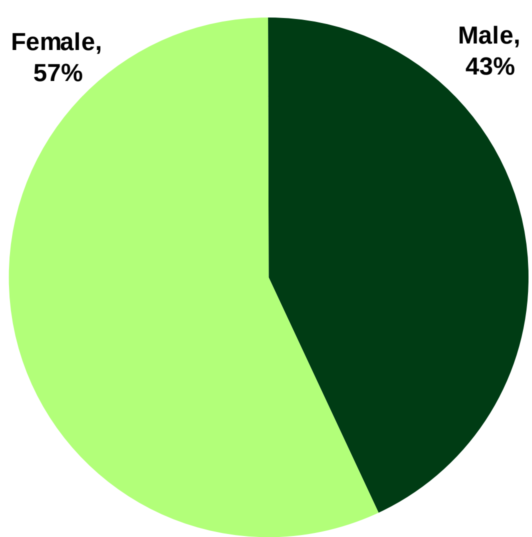




E4. How many years have you lived in Canada? E5. In which country were you born?
Base: Respondents not born in Canada n=167

Gender

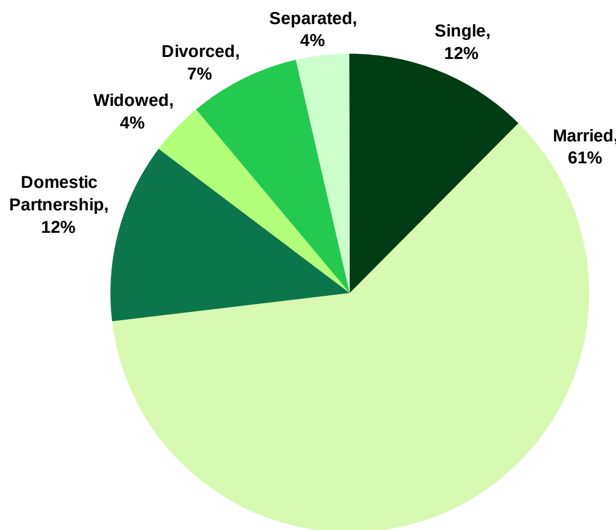
All Respondents



Base: All Respondents n=1139

Marital Status

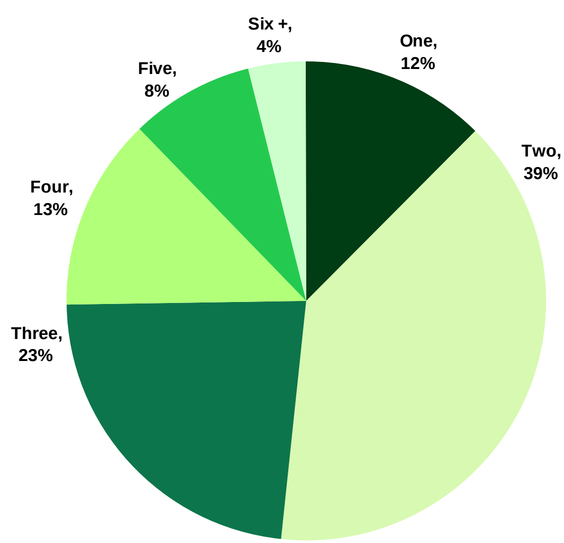
All Respondents



Base: All Respondents n=1139

Household Size

All Respondents

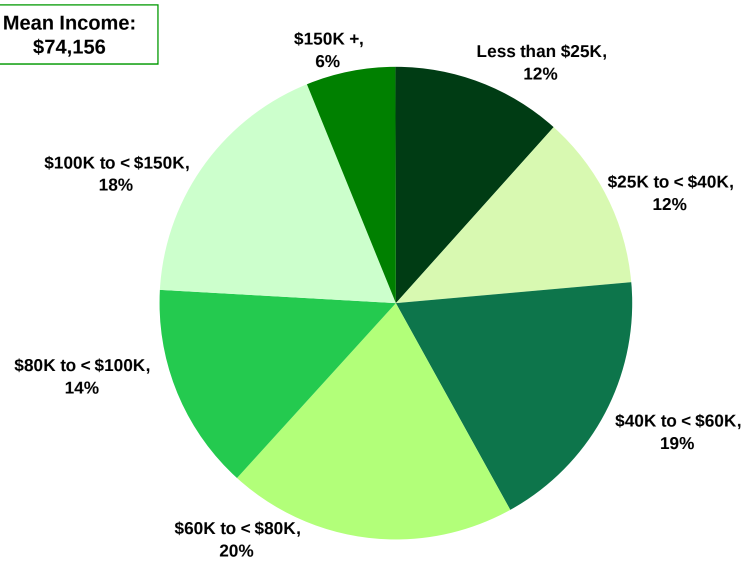


Base: All Respondents n=1139

Household Income

All Respondents

Mean Income:
$74,156

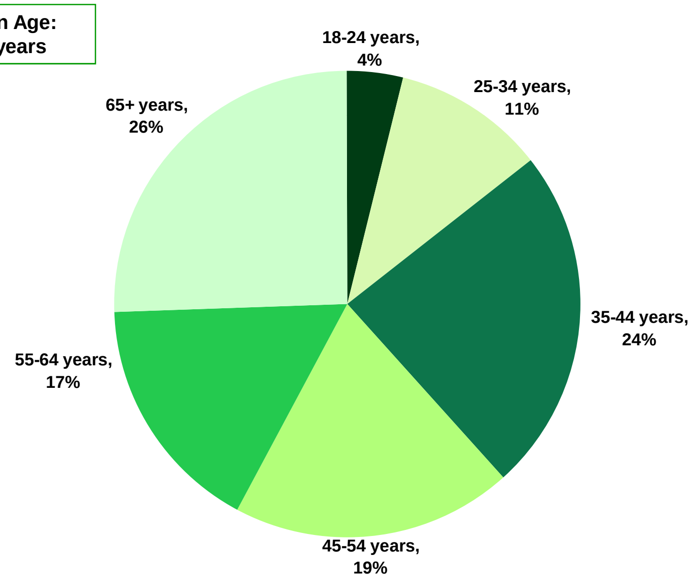


Base: All Respondents n=1139

Age of Respondent

All Respondents

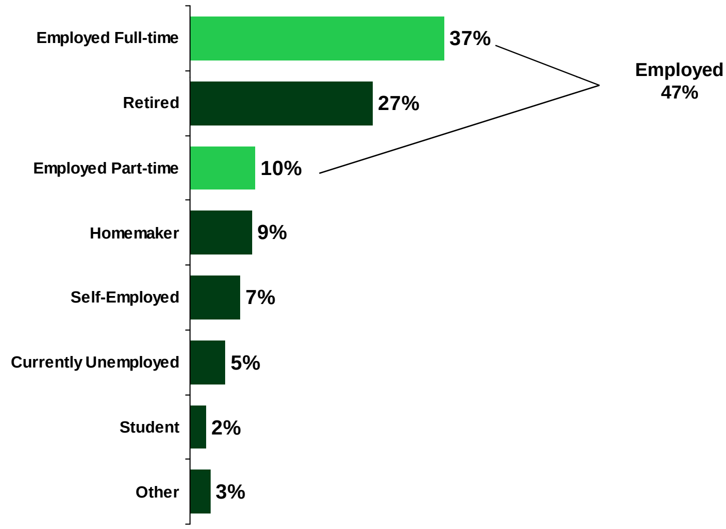
Mean Age:
50 years



Base: All Respondents n=1139

Employment Status

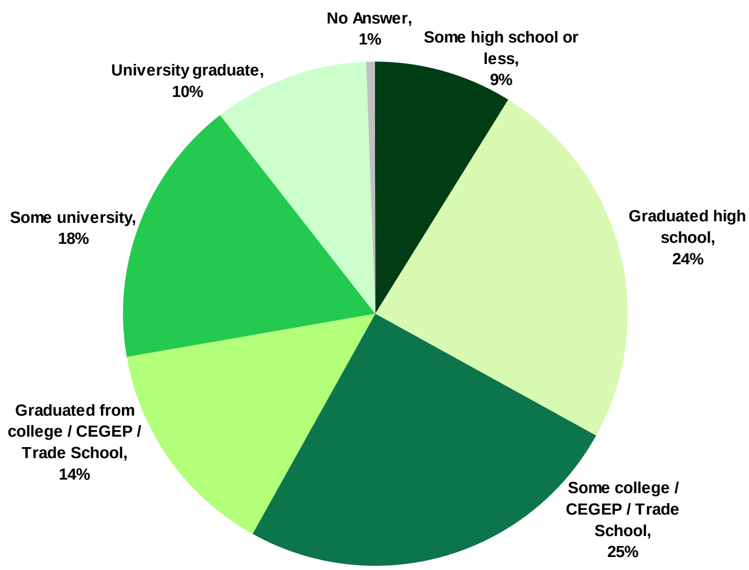
All Respondents



Base: All Respondents n=1139

Education

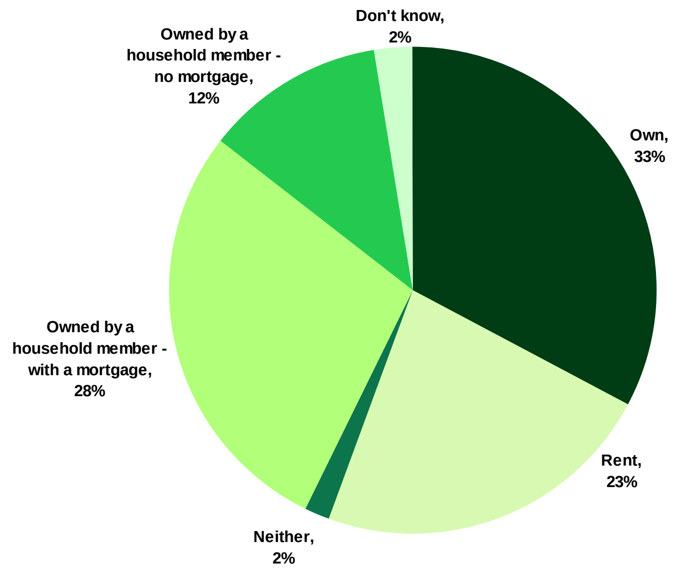
All Respondents



Base: All Respondents n=1139

Own or Rent Residence

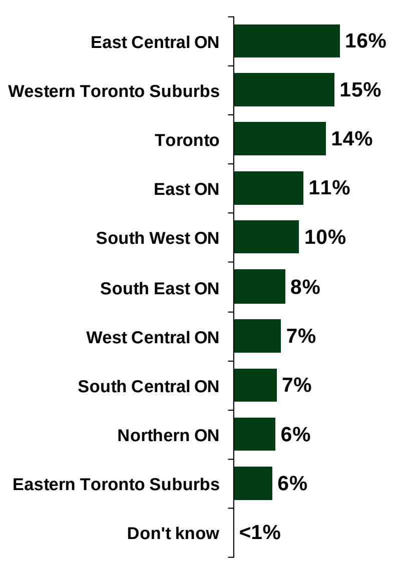
All Respondents



Base: All Respondents n=1139

Own or Rent Residence

All Respondents



Base: All Respondents n=1139

For More Information Please Contact:

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Addendum – Retail Focus Slides

Purchase Location of Fresh Whole-Fruit

All Respondents – Segment Summary

	Total n=1139 %	Engaged Fruit Lovers A n=330 %	Healthy Trend Setters B n=299 %	Exotic Fruit Seekers C n=235 %	Uninvolved Fruit Avoiders D n=268 %
Large Chain Grocery Stores	43	44	48	41	41
Discount Grocery Stores	41	41 B	31	47 B	49 B
Independent Grocery Stores	7	7	9	5	5
Farmers' Markets/ From Farmer	5	4 D	9 ACD	3	1
Mass Merchandisers/ Discount Dept	2	2	1	1	2
Warehouse/ Club Stores	1	1	2	1	2
Ethnic Grocery Stores	1	1	1	3	1

Q5. At which of the following food retail locations do you purchase the majority of your fresh whole-fruit?
Base: All Respondents n=1139

Purchase Location of & Amount Spent per Month on Fresh Whole-Fruit

All Respondents – Whole Fresh-Fruit Purchase Location

	Total (n=1139) %	Large Chain A (n=493) %	Discount B (n=470) %	Independent C (n=76) %	Farmers D (n=51) %	Mass Merchandiser/ Club/ Ethnic E (n=48) %
Light ($1-$50 on fresh whole-fruit)	52	52	55 C	43	44	50
Moderate ($51-$90 on fresh whole-fruit)	21	19	22	27	21	23
Heavy ($91+ on fresh whole-fruit)	27	29	24	31	35	28
Mean ($ spent on fresh whole-fruit)	$73	$73	$70	$79	$81	$78

Q7. And in a typical month, how much would you estimate that your household spends on fresh whole-fruit?
Base: All Respondents n=1139

Actively Look for Province/ Country of Origin for Fruits

All Respondents – Fresh Whole-Fruit Purchase Location – Always/ Often Summary

Actively Look for Province/ Country of Origin (Always Often Summary)	Total (n=1139) %	Large Chain A (n=493) %	Discount B (n=470) %	Independent C (n=76) %	Farmers D (n=51) %	Mass Merchandiser/ Club/ Ethnic E (n=48) %
Apples	64	67 B	59	65	80 B	69
Peaches	57	60 B	53	55	76 ABC	58
Grapes	52	54	48	50	66 B	61
Pears	51	53	47	43	76 ABC	68 BC
Plums	48	50 B	43	46	68 ABC	57
Nectarines	47	49	42	47	65 AB	49

Q10. 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 below. Base: All respondents n=1139 (Always/ Often Summary Table – Top 2 Box)

"Highest Quality Fruit" (Ontario)

All Respondents – Fresh Whole-Fruit Purchase Location – Product of Ontario Summary

Highest Quality Product (Ontario Summary)	Total (n=1139) %	Large Chain A (n=493) %	Discount B (n=470) %	Independent C (n=76) %	Farmers D (n=51) %	Mass Merchandiser/ Club/ Ethnic E (n=48) %
Apples	70	71	68	72	74	64
Peaches	62	65 B	58	68	66	60
Pears	49	52 B	43	51	65 B	46
Plums	39	44 B	35	34	50	35
Grapes	29	31	26	27	37	25
Nectarines	30	32	26	37	43 B	29

Q11. 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: All respondents n=1139 (Ontario Summary Table)

Easy in Identifying Locally Produced Fruit

All Respondents – Fresh Whole-Fruit Purchase Location

	Total	Large Chain	Discount	Independent	Farmers	Mass Merchandiser/ Club/ Ethnic
		A	B	C	D	E
	(n=1139) %	(n=493) %	(n=470) %	(n=76) %	(n=51) %	(n=48) %
Very Easy to Identify	35	40 B	30	36	38	32
Somewhat Easy to Identify	45	42	47	51	49	46
Somewhat Difficult to Identify	17	14	20 A	12	13	18
Very Difficult to Identify	3	4	3	1	-	4
Easy to Identify	80	82 B	76	87 B	87	78
Difficult to Identify	20	18	24 AC	13	13	22

Q14. 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=1139

Easy in Identifying Locally Produced Fruit

All Respondents – Fresh Whole-Fruit Purchase Location

	Total	Large Chain	Discount	Independent	Farmers	Mass Merchandiser/ Club/ Ethnic
		A	B	C	D	E
	(n=1139) %	(n=493) %	(n=470) %	(n=76) %	(n=51) %	(n=48) %
Very Easy to Identify	35	43 CD	41 CD	28	24	35
Somewhat Easy to Identify	45	42	47	44	49	45
Somewhat Difficult to Identify	17	14	11	24 AB	20 B	17
Very Difficult to Identify	3	1	1	4 AB	7 AB	3
Easy to Identify	80	85 CD	88 CD	72	73	80
Difficult to Identify	20	15	12	28 AB	27 AB	20

Q14. 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=1139

Specific Advantages of Basket Packaging

All Respondents – Whole Fresh-Fruit Purchase Location

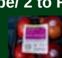
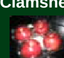
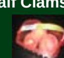
	Total	Large Chain	Discount	Independent	Farmers	Mass Merchandiser/ Club/ Ethnic
		A	B	C	D	E
	(n=1139) %	(n=493) %	(n=470) %	(n=76) %	(n=51) %	(n=48) %
Easily Tell Where Fruit is Grown/ Grown in Ontario/ Local	36	35	38	29	39	32
Fruit is Visible/ Can Inspect Fruit	23	22	25	21	22	25
Recyclable/ Reusable/ Biodegradable	20	21	17	26	26	22
Convenient/ Easy to Carry	16	16	16	13	12	8
Looks Fresh/ Freshly Picked	6	4	7	12 AD	2	8
Attractive/ Appealing	5	5	5	5	7	7
Protect Fruit/ Improves Shelf Life	5	6	5	4	7	8

Total mentions less than 5% are not shown

Q21a. What, if anything do you particularly like about the use of these baskets as packaging?
Base: All respondents n=1139

Concept Appeal & Advantages of Basket Packaging

All Respondents – Concept Appeal Summary for Peaches, Plums or Nectarines

	Total	Concept 1: 2 Ripe/ 2 to Ripen 		Concept 2: Clamshell 		Concept 3: Half Clamshell 		Concept 4: Soft Tray 	
		Appealing A	Unappealing B	Appealing C	Unappealing D	Appealing E	Unappealing F	Appealing G	Unappealing H
	(n=1139) %	(n=507) %	(n=393) %	(n=384) %	(n=583) %	(n=524) %	(n=400) %	(n=226) %	(n=708) %
Easily Tell Where Fruit is Grown/ Grown in Ontario/ Local	36	36	35	35	37	33	40 EG	32	37
Fruit is Visible/ Can Inspect Fruit	23	25 F	26 F	24 F	24 F	29 ACDFH	17	26 F	24 F
Recyclable/ Reusable/ Biodegradable	20	20	22	17	23 CEG	18	25 ACEG	16	23 CEG
Convenient/ Easy to Carry	16	15	18	16	16	1	16	17	16
Looks Fresh/ Freshly Picked	6	6	6	5	6	5	7	5	6
Attractive/ Appealing	5	6 BE	3	8 BDEFH	4	4	4	6 B	4
Protect Fruit/ Improves Shelf Life	5	6	5	5	5	6	6	8 CH	4

Total Mentions less than 5% are not shown

Q21a. What, if anything do you particularly like about the use of these baskets as packaging?
Base: All respondents n=1139

Concept Appeal & Advantages of Basket Packaging

All Respondents – Concept Appeal Summary for Apples & Pears

	Total	Concept 1: 2 Ripe/ 2 to Ripen 		Concept 2: Clamshell 		Concept 3: Half Clamshell 		Concept 4: Soft Tray 	
		Appealing A	Unappealing B	Appealing C	Unappealing D	Appealing E	Unappealing F	Appealing G	Unappealing H
	(n=1139) %	(n=504) %	(n=396) %	(n=388) %	(n=578) %	(n=491) %	(n=416) %	(n=230) %	(n=718) %
Easily Tell Where Fruit is Grown/ Grown in Ontario/ Local	36	36	35	35	37	33	41 BEGH	32	37
Fruit is Visible/ Can Inspect Fruit	23	23	26 F	24	24 F	28 ACFH	19	27 F	24 F
Recyclable/ Reusable/ Biodegradable	20	20	21	17	23 CEG	17	25 ACEG	16	23 CEG
Convenient/ Easy to Carry	16	15	18	17	16	15	17	18	15
Looks Fresh/ Freshly Picked	6	5	5	6	6	5	7	6	6
Attractive/ Appealing	5	7 BE	3	7 BE	5	4	4	6	5 B
Protect Fruit/ Improves Shelf Life	5	5	6 H	5	5	6	5	8 A	4

Total Mentions less than 5% are not shown

Q21a. What, if anything do you particularly like about the use of these baskets as packaging?
Base: All respondents n=1139

Specific Disadvantages of Basket Packaging

All Respondents – Whole Fresh-Fruit Purchase Location

	Total	Large Chain	Discount	Independent	Farmers	Mass Merchandiser/ Club/ Ethnic
		A	B	C	D	E
	(n=1139) %	(n=493) %	(n=470) %	(n=76) %	(n=51) %	(n=48) %
Difficult to see/ check quality of fruit	11	10	11	16 D	4	14
Fruit falls out	10	10	10	13	5	12
Fruit on bottom bruised/ rotten	7	6	7	7	12	10
Quantity too large/ too much fruit in basket	6	8	5	6	7	2
Anyone can handle the fruit	5	4	5	7	4	6
Disposable/ not reusable/ recyclable	4	3	5	1	9 AC	2

Total mentions less than 4% are not shown

Q21b. What, if anything do you particularly dislike about the use of these baskets as packaging?
Base: All respondents n=1139

Attribute Association: Ontario versus U.S.

Apples Cell – Location Majority of Fresh Whole-Fruit is Purchased - Associated with Ontario Summary

Associated with Ontario	Total (n=178) %	Large Chain A (n=75) %	Discount B (n=76) %	Independent (n=11**) %	Farmers (n=8**) %	Mass Merchandiser/ Club/ Ethnic (n=8**) %
Freshest	75	72	74	91	75	100
Highest Consistency in Quality	71	72	68	91	63	75
Best Taste	70	66	68	91	75	88
Best Texture	66	67	60	82	75	88
Best Appearance	66	63	62	82	75	100
Longest After-Purchase Shelf Life	66	62	63	82	63	100
Best Value for Money	60	58	57	73	75	88
Convenient Packaging	55	58	50	73	38	75
Highest Nutritional Value	55	55	53	82	25	63
Lowest Price	52	45	56	64	50	63
Convenient to Eat 'On-the-Go'	53	53	47	82	38	75
Always Available Year Round	44	40	38	73	50	100

***Due to very small base sizes, significance testing not done on Independent, Farmers, Mass Merchandisers/Club/ Ethnic ***

Q24. Still thinking about Apples, please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Apple Cell" n=178

Attribute Association: Ontario versus U.S.

Apples Cell – Location Majority of Fresh Whole-Fruit is Purchased – Neutral Association Summary

Neutral Country Association	Total (n=178) %	Large Chain A (n=75) %	Discount B (n=76) %	Independent (n=11**) %	Farmers (n=8**) %	Mass Merchandiser/ Club/ Ethnic (n=8**) %
Convenient to Eat 'On-the-Go'	46	44	53	18	63	25
Highest Nutritional Value	45	43	47	18	75	36
Lowest Price	43	49	39	36	50	38
Convenient Packaging	40	38	45	18	63	25
Always Available Year Round	40	37	49	18	50	-
Best Value for Money	36	37	42	18	25	13
Best Appearance	33	33	38	18	25	-
Best Texture	32	29	39	18	25	13
Longest After-Purchase Shelf Life	32	33	36	18	38	-
Best Taste	29	32	32	9	25	13
Highest Consistency in Quality	26	24	29	9	38	25
Freshest	22	21	26	9	25	-

***Due to very small base sizes, significance testing not done on Independent, Farmers, Mass Merchandisers/Club/ Ethnic ***

Q24. Still thinking about Apples, please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Apple Cell" n=178

Attribute Association: Ontario versus U.S.

Peaches Cell – Location Majority of Fresh Whole-Fruit is Purchased – Associated with Ontario Summary

Associated with Ontario	Total (n=174) %	Large Chain A (n=81) %	Discount B (n=65) %	Independent (n=13**) %	Farmers (n=8**) %	Mass Merchandiser/ Club/ Ethnic (n=7**) %
Freshest	76	77	72	77	62	86
Best Taste	70	75	62	62	88	100
Highest Consistency in Quality	62	58	62	62	100	71
Best Appearance	60	61	51	62	100	86
Longest After-Purchase Shelf Life	59	52	58	69	88	86
Best Value for Money	57	60	42	69	100	86
Convenient Packaging	54	48	45	46	63	71
Highest Nutritional Value	42	42	42	31	75	29
Lowest Price	40	46 B	30	46	50	43
Convenient to Eat 'On-the-Go'	40	38	38	31	88	29
Best Texture	33	31	37	62	-	14
Always Available Year Round	6	7	6	-	-	14

***Due to very small base sizes, significance testing not done on Independent, Farmers, Mass Merchandisers/Club/ Ethnic ***

Q24. Still thinking about Peaches, please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Peaches Cell" n=174

Attribute Association: Ontario versus U.S.

Peaches Cell – Location Majority of Fresh Whole-Fruit is Purchased – Neutral Association Summary

Neutral Country Association	Total (n=174) %	Large Chain A (n=81) %	Discount B (n=65**) %	Independent (n=8**) %	Farmers (n=8**) %	Mass Merchandiser/ Club/ Ethnic (n=7**) %
Convenient to Eat 'On-the-Go'	40	38	38	31	88	29
Highest Nutritional Value	56	57	54	69	25	71
Lowest Price	47	42	56	46	38	43
Convenient Packaging	49	48	52	54	38	29
Best Value for Money	38	36	50	31	-	-
Best Appearance	36	35	46	39	-	-
Best Texture	33	31	37	62	-	14
Longest After-Purchase Shelf Life	37	42	40	31	13	-
Best Taste	27	24	34	39	13	-
Highest Consistency in Quality	36	41	35	39	-	29
Freshest	21	20	26	23	-	-
Always Available Year Round	45	46	54	38	43	45

***Due to very small base sizes, significance testing not done on Independent, Farmers, Mass Merchandisers/Club/ Ethnic ***

Q24. Still thinking about Peaches, please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Peaches Cell" n=174

Attribute Association: Ontario versus U.S.

Pears Cell – Location Majority of Fresh Whole-Fruit is Purchased – Associated with Ontario Summary

Associated with Ontario	Total (n=176) %	Large Chain A (n=84) %	Discount B (n=63) %	Independent (n=12**) %	Farmers (n=12**) %	Mass Merchandiser/ Club/ Ethnic (n=5**) %
Best Taste	78	75	71	67	83	40
Freshest	77	76	81	58	83	60
Highest Consistency in Quality	62	60	62	67	67	60
Best Texture	59	65	56	42	58	40
Longest After-Purchase Shelf Life	57	57	60	42	50	60
Best Value for Money	56	61	54	33	58	40
Best Appearance	56	56	60	25	58	60
Highest Nutritional Value	53	48	42	42	75	40
Convenient Packaging	49	53	49	25	42	60
Lowest Price	46	47	51	33	36	20
Convenient to Eat 'On-the-Go'	42	46	38	25	50	40
Always Available Year Round	16	13	21	-	33	-

***Due to very small base sizes, significance testing not done on Independent, Farmers, Mass Merchandisers/Club/ Ethnic ***

Q24. Still thinking about Pears, please indicate the degree to which you associate each attribute listed below with Ontario-produced ... versus those produced in the United States. Base: Respondents in the "Pears Cell" n=176

Attribute Association: Ontario versus U.S.

Pears Cell – Location Majority of Fresh Whole-Fruit is Purchased – Neutral Association Summary

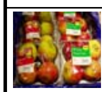
Neutral Country Association	Total (n=176) %	Large Chain A (n=84) %	Discount B (n=63) %	Independent (n=12**) %	Farmers (n=12**) %	Mass Merchandiser/ Club/ Ethnic (n=5**) %
Convenient to Eat 'On-the-Go'	57	52	61	75	50	60
Highest Nutritional Value	53	51	58	58	25	60
Convenient Packaging	49	45	49	75	58	40
Always Available Year Round	47	47	46	50	25	100
Lowest Price	45	45	40	58	55	60
Best Appearance	41	39	38	75	42	40
Longest After-Purchase Shelf Life	41	38	39	58	50	40
Best Texture	40	33	44	58	42	60
Best Value for Money	38	31	40	58	42	60
Highest Consistency in Quality	35	34	37	33	33	40
Best Taste	25	22	27	33	17	60
Freshest	22	24	16	33	17	40

***Due to very small base sizes, significance testing not done on Independent, Farmers, Mass Merchandisers/Club/ Ethnic ***

Q24. Still thinking about Pears, please indicate the degree to which you associate each attribute listed below with Ontario-produced...versus those produced in the United States. Base: Respondents in the "Pears Cell" n=176

Concept Appeal & Purchase Location for Peaches, Plums, or Nectarines

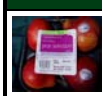
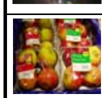
All Respondents – Location Majority of Fresh Whole-Fruit is Purchased– Concept Appealing

Concept Appealing	Total (n=1139) %	Large Chain A (n=493) %	Discount B (n=470) %	Independent C (n=76) %	Farmers D (n=51) %	Mass Merchandiser/ Club/ Ethnic E (n=48) %
 Concept 1: 2 Ripe/ 2 to Ripen	45	44	44	50	44	49
 Concept 2: Clamshell	34	37 BD	29	36	25	48 BD
 Concept 3: Half Clamshell	46	47 D	45	47	31	58 D
 Concept 4: Soft Tray	20	20	21	17	9	23

Q27. Using the scale below, please indicate the degree to which you would find this type of packaging appealing for the types of fruit listed below' Base: All Respondents n=1139 – (Appealing Summary – Top 2 Box)

Concept Appeal & Purchase Location for Apples & Pears

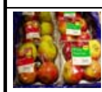
All Respondents – Location Majority of Fresh Whole-Fruit is Purchased– Concept Appealing

Concept Appealing	Total (n=1139) %	Large Chain A (n=493) %	Discount B (n=470) %	Independent C (n=76) %	Farmers D (n=51) %	Mass Merchandiser/ Club/ Ethnic E (n=48) %
 Concept 1: 2 Ripe/ 2 to Ripen	44	45	42	53	44	42
 Concept 2: Clamshell	34	37 BD	31	32	22	50 BCD
 Concept 3: Half Clamshell	43	43 D	43 D	48 D	28	53 D
 Concept 4: Soft Tray	20	20	20	19	10	32 D

Q27. Using the scale below, please indicate the degree to which you would find this type of packaging appealing for the types of fruit listed below' Base: All Respondents n=1139 – (Appealing Summary – Top 2 Box)

Concept Appeal & Purchase Location for Clusters of Grapes

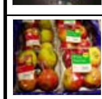
All Respondents – Location Majority of Fresh Whole-Fruit is Purchased– Concept Appealing

Concept Appealing		Total (n=1139) %	Large Chain A (n=493) %	Discount B (n=470) %	Independent C (n=76) %	Farmers D (n=51) %	Mass Merchandiser/ Club/ Ethnic E (n=48) %
	Concept 1: 2 Ripe/ 2 to Ripen	23	25	22	27	23	25
	Concept 2: Clamshell	23	25	21	24	21	31
	Concept 3: Half Clamshell	42	41 D	43 D	39	27	54 D
	Concept 4: Soft Tray	16	15	15	18	10	21

Q27. Using the scale below, please indicate the degree to which you would find this type of packaging appealing for the types of fruit listed below'. Base: All Respondents n=1139 – (Appealing Summary – Top 2 Box)

Concepts for Clusters of Grapes

All Respondents – Location Majority of Fresh Whole-Fruit is Purchased– Concept Appealing

Concept Appealing		Total (n=1139) %	Large Chain A (n=493) %	Discount B (n=470) %	Independent C (n=76) %	Farmers D (n=51) %	Mass Merchandiser/ Club/ Ethnic E (n=48) %
	Concept 1: 2 Ripe/ 2 to Ripen	23	25	22	27	23	25
	Concept 2: Clamshell	23	25	21	24	21	31
	Concept 3: Half Clamshell	42	41 D	43 D	39	27	54 D
	Concept 4: Soft Tray	16	15	15	18	10	21

Q27. Using the scale below, please indicate the degree to which you would find this type of packaging appealing for the types of fruit listed below' Base: All Respondents n=1139 – (Appealing Summary – Top 2 Box)

Alternative Display Options

All Respondents – Location Majority of Fresh Whole-Fruit is Purchased

	Total (n=1139) %	Large Chain A (n=493) %	Discount B (n=470) %	Independent C (n=76) %	Farmers D (n=51) %	Mass Merchandiser/ Club/ Ethnic E (n=48) %
 Strongly prefer 'Option A'	33	33	33	37	37	28
Somewhat prefer 'Option A'	14	13	16	16	15	12
Neutral	4	4	4	2	4	11 ABC
 Somewhat prefer 'Option B'	18	18	17	23	17	17
Strongly prefer 'Option B'	31	33	30	22	28	33
Prefer 'Option A': Canadian Concept	47	45	49	52	52	39
Prefer 'Option B': UK Concept	49	51	47	45	45	50

Q29. Below are two photos illustrating how fruit can be displayed in a grocery store. Please identify which display type you prefer using the scale provided. Base: All Respondents n=1139