blueberries®

U.S. HIGHBUSH BLUEBERRY COUNCIL

Topline Report
Winter 2020
U & A Study Wave 2

Definition of Attitudinal Segments

Targeted Segments

Fun-Loving Freshness Fans (FFF)

Providing fresh fruit for my family is important but easy.

Overwhelmed Young Families (OYF)

I want to do what is best for my family in terms of health and fruit consumption, but I'm not sure what that is.

Highly-Confident Caretakers (HCC)

I know what is best for my family's health and have no problems providing it.

PRIMARY

SECONDARY

Summary Findings

OYF

- Continue to have the largest households due to greater % having children <18 living at home
- Buy more cups annually on a self-reported basis than other segments and had a large increase in total cups this wave driven by Frozen
- Only segment to consume more Frozen than Fresh (self-reported)
- As avid consumers of information, this segment reports the highest awareness of news regarding the health benefits of blueberries
- Report highest awareness of advertising and influencers at approximately 30% (caution: this is typically a highly overstated measure)
- Remain most price sensitive vs other segments with almost 1/3 reporting that "price has increased a lot"- significantly higher than FFF and HCC

FFF

- Buy the fewest cups annually on a self-reported basis
- Slight increase in total Fresh cups purchased in this wave vs. Summer wave
- Are significantly more likely than OYF to purchase Fresh and Frozen blueberries year-round
- Have a significantly stronger knowledge of the top 3 health benefits vs. OYF

HCC

- Buy the 2nd highest number of cups annually on a self-reported basis, flat vs. Summer wave
- Substantial increase in likelihood to purchase Fresh year-round, up to 73%
- Appear to be the least price sensitive of the three segments, however they did show sizeable increases in the perception that "price has increased a little" as well as "occasionally a high price stops me from purchasing"

Executive Summary*

- Reported consumption of blueberries among our targets remains strong
  - Purchase intent in the next 12 months remains constant
  - Recency of purchase fairly consistent in this Winter wave vs. Summer wave

- While there appear to be many similarities between blueberry buyers and non-buyers, non-buyers purchase all fruits at much lower levels than buyers

- SEASONAL OBSERVATIONS
  - Seasonal differences beyond 1-month purchase intent appear to be minimal
  - Purchase Intent in the next 1-month has fallen significantly vs. Summer wave for FFF and HCC, likely because blueberries are not a top of mind purchase during the winter months
  - While ranking is the same, lower overall ratings reported on Attributes used to evaluate blueberries before purchase. We speculate this is due simply to a seasonal drop in top of mind awareness
  - Sizeable increase in awareness of news regarding health benefits of blueberries, perhaps due to increased focus on healthy eating and healthy lifestyle which is prominent around the New Year celebration

- FROZEN SEGMENT
  - Usage of Frozen growing despite 61% of respondents reporting that they believe Fresh blueberries are much/somewhat more healthy than Frozen blueberries
  - Frozen blueberries and strawberries are, by far, the top two frozen fruits purchased
  - Reasons for not buying Frozen are varied with respondents just not preferring them or not finding a need for them.
    - Level of reported trier/rejectors is low
  - While not necessary to focus specifically on Frozen in promotion, that market is active right now so take advantage of the growth opportunity by incorporating the form alongside Fresh visually whenever appropriate

Executive Summary*

- STRAWBERRIES
  - While technically a berry, it appears that consumers may treat strawberries differently, more like a staple fruit and less like a berry, which affects the purchasing dynamics and the competitive interaction of strawberries and blueberries
  - Worth investigating what is different and why in the way consumers use blueberries vs. strawberries; could be interesting strategic insights here which would open up opportunities.
- HEALTH BENEFITS
  - The health benefits of blueberries continue to be recognized at high levels however, the specific association most closely made with blueberries is “high in antioxidants”. This is a powerful statement and is more associated with blueberries than any of the other health benefits which are largely seen as being able to be delivered by many types of fruit
  - Being high in antioxidants is the only truly differentiating health benefit of blueberries
  - Because of this, it may be wise to focus health messaging on the power of antioxidants as blueberries already own this association and can leverage the ongoing news regarding the benefits of antioxidants which continues to be reported in the general press
- PENETRATION
  - It is worth further investigation into the true household penetration for blueberries. Based on responses in this study, 38% penetration seems unrealistically low. Recommendation is to investigate further with census/panel data and understand exactly what is being measured as this data point makes a huge difference in strategic approach

*Note: we have flagged topics with a where we believe there is interesting data that is worthy of longitudinal study or additional investigation

Strategic Considerations For Short-Term Action

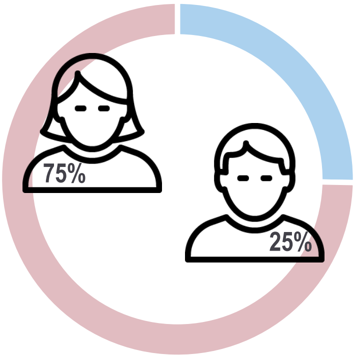
- Strawberries
  - If strawberries are perceived more as a staple fruit by consumers and, therefore, reside on a preference tier that corresponds more closely to apples and bananas, this fundamentally changes the interaction between strawberries and blueberries. If true, consumers may not be exchanging strawberries for blueberries and vice versa; any strategy based on this premise would likely be ineffective. In a situation like this, significant blueberry growth may require a perceptual shift by consumers elevating blueberries to the same tier as strawberries. These strategies would be fundamentally different than those considered in the “competing-berry” framework.
- Health Studies
  - Blueberries’ association as a powerful source of antioxidants is reaffirmed in this latest wave of research. It is not only the strongest health benefit of blueberries recognized by consumers, but also one of the very few believed to be relatively exclusive to blueberries compared to other fruit. The cost of exploring and ‘proving’ health benefits associated with blueberries can be extraordinarily high and the impact on consumers unknown. The consumer value of the health benefits associated with antioxidants is already well established and the strong link to blueberries delivers an opportunity to elevate the perceived health effects of blueberries. The funds slated for ongoing and additional health studies can be repurposed to bolster a consumer campaign that will likely yield greater benefits in the short-term.
- Current Promotion
  - The slow growth of blueberries currently being experienced may be due, in part, to a promotional campaign that is broader than current funds can support. Questions arose in analyzing the data from this wave of research as to whether or not the current campaign has the focus and high profile impact necessary to elevate blueberries in the consumer’s mind. We hypothesize that none of the various current programs are reaching critical mass, so while the box is checked against all stakeholders and marketing tactics, none have the potential to disrupt the market and change consumer behavior. Given a comparatively small budget, can increased focus and a prioritizing of consumer promotion give blueberries the added awareness and top-of-mindedness necessary to impact the current inertia in the market?

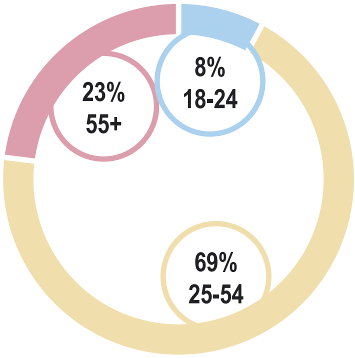
Strategic Considerations For Short-Term Action

- Target Segments
  - Greater efficiency in promotion may also be achieved by working out the parameters necessary to reach the OYF and FFF target segments. More highly directed targeting coupled with a more focused promotional campaign can potentially boost the effectiveness of the current promotional dollars. The identified segments appear to have been reconfirmed in this wave as the most valuable segments for blueberry promotion. These groups favor blueberries over other fruit, are relatively price insensitive, health conscious, and consume year-round. Since the research suggests both groups contain a wide range of consumption levels it is reasonable to conclude that neither group has reached its maximum consumption capacity. Both of these segments should be receptive to a strong, focused promotional campaign that communicates a relevant benefit.
- “Effortlessly Good”
  - Following the July ‘19 U&A, a draft and base level strategic planning document was put together offering several suggestions based on the knowledge available at the time. One of the considerations included a brief rationale on potential positioning that might be impactful with the target segments. Given the segments desire for healthy eating and simplicity in incorporating healthy eating habits into their lives, a positioning idea was developed and captured as “Effortlessly Good”. This idea seems to address the target segments’ desires while anchoring on attributes and benefits that in combination are exclusive to blueberries.
- Reintroduce Blueberries - High Impact/High Visibility Campaign
  - Grounded in all of the thinking presented above and to shake up the inertia in the market while attempting to drive blueberries to another preference tier, consider a ‘reintroduction’ of the blueberry. In the message-rich world that we live in, current blueberry communications are ignorable. Market disruption is needed to change the trajectory of sales volume; make a big splash to get people thinking about and talking about blueberries. Giving consumers a new reason to rethink their blueberry usage will reinforce the behavior of current high-consuming consumers and will activate marginal users. Consolidate spending against a high impact campaign that asserts the powerful goodness of blueberries – leverage the strong association with antioxidants and their health protective benefits, the simplicity of use and the deliciousness of the berry.
  - Retail efforts can add a strong synergistic effect to an introductory campaign and it would be an easy bridge to carry the elements of a new campaign designed for visibility and impact into retail display.

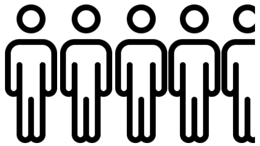
Demographics

Respondent Details

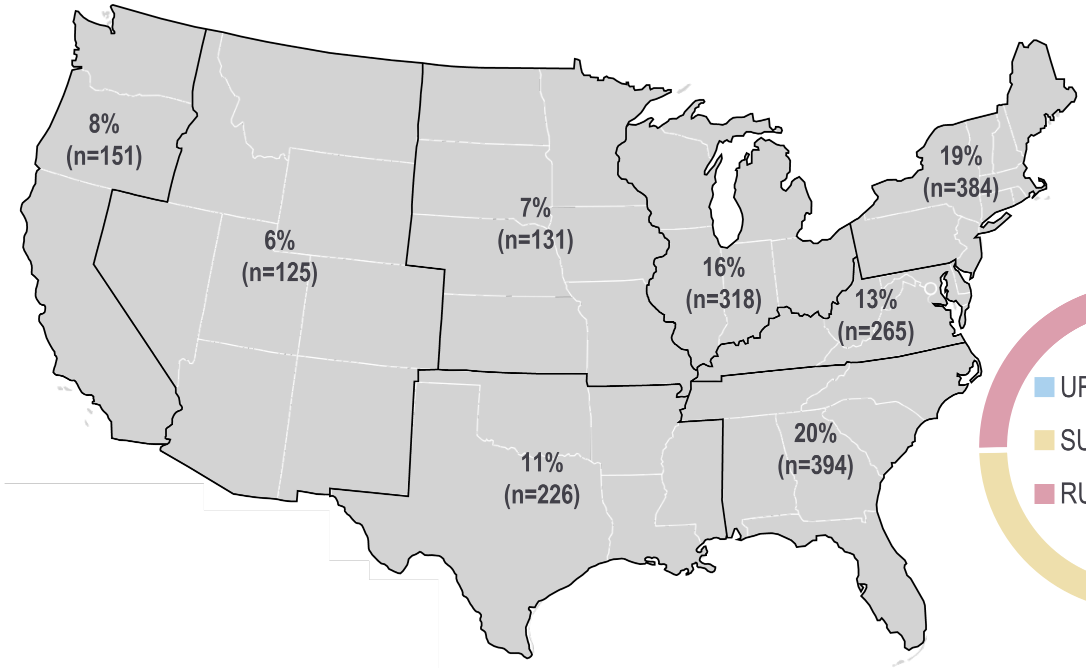


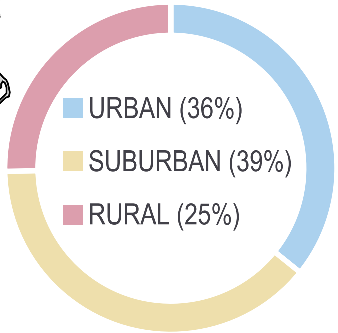


FAMILY SIZE

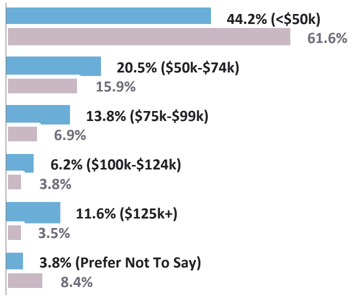


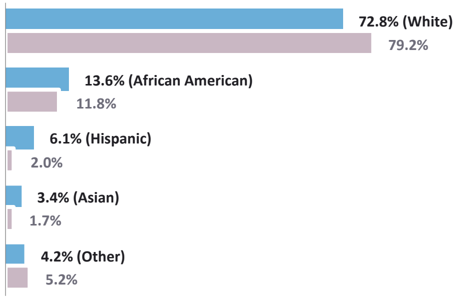
BUYERS

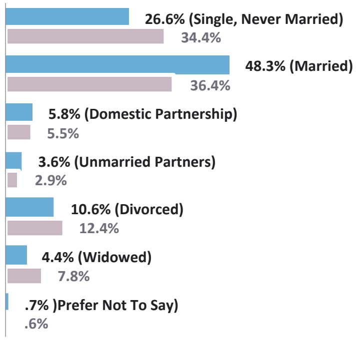




INCOME



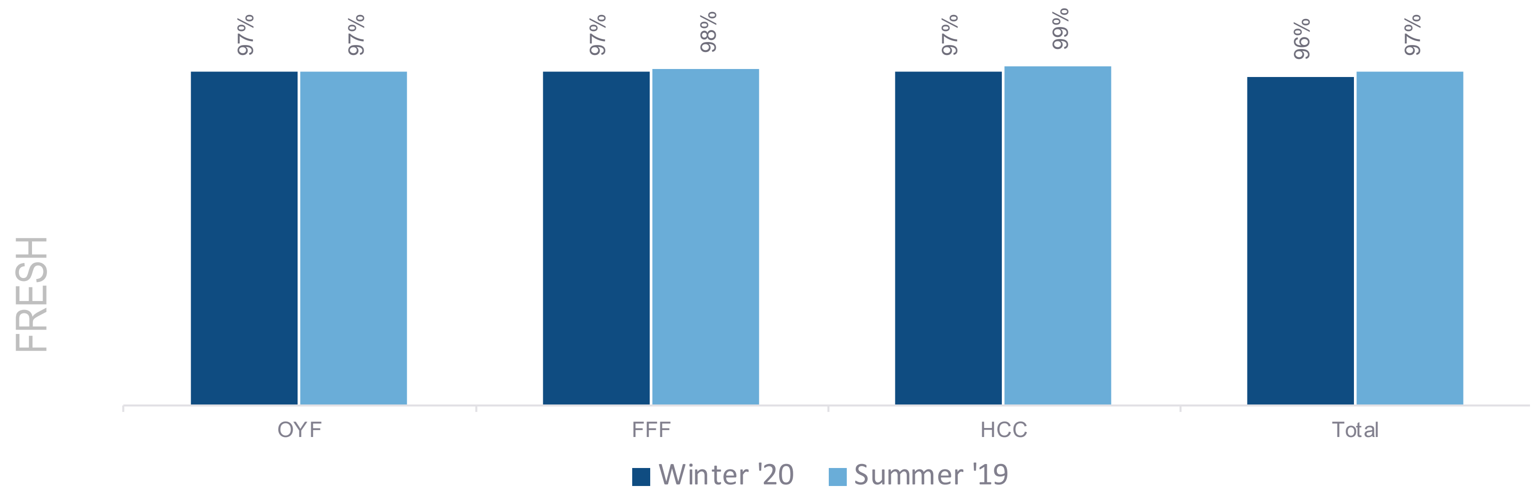


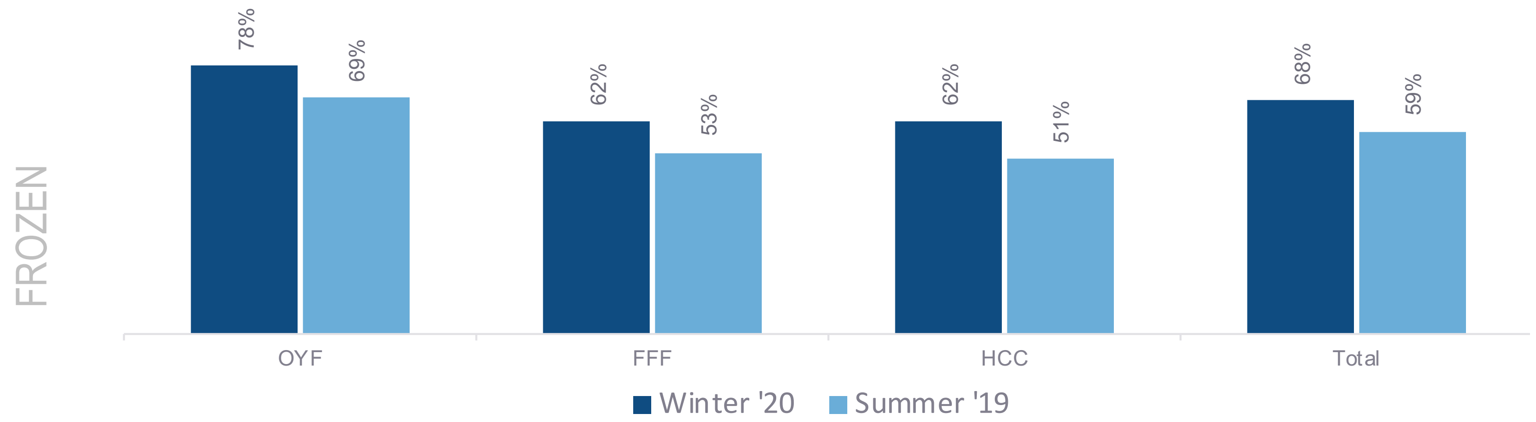


- Study Fielded: Jan - Feb 2020
- Total Sample = 2002
  - Buyers = 1502
  - Non-buyers = 500
- Determined by quota
  - Gender
  - Age distribution
  - Regional distribution
  - Attitudinal segments
- Avg. family size
  - Buyers = 4.6
- National geographic representation

Penetration by Form

% having purchased form in past 12 months





- Fresh form dominates with all attitudinal segments purchasing at the same rate which is just under 100%
- OYF show significantly higher usage of all alternate forms, including Frozen
- All segments showed a sizeable increase in the rate of purchasing Frozen in the Winter wave vs. the Summer wave
  - This could be a seasonal effect with the Frozen form being more top of mind in the winter wave but could also be a strengthening of the Frozen form as potentially indicated in other data within this wave

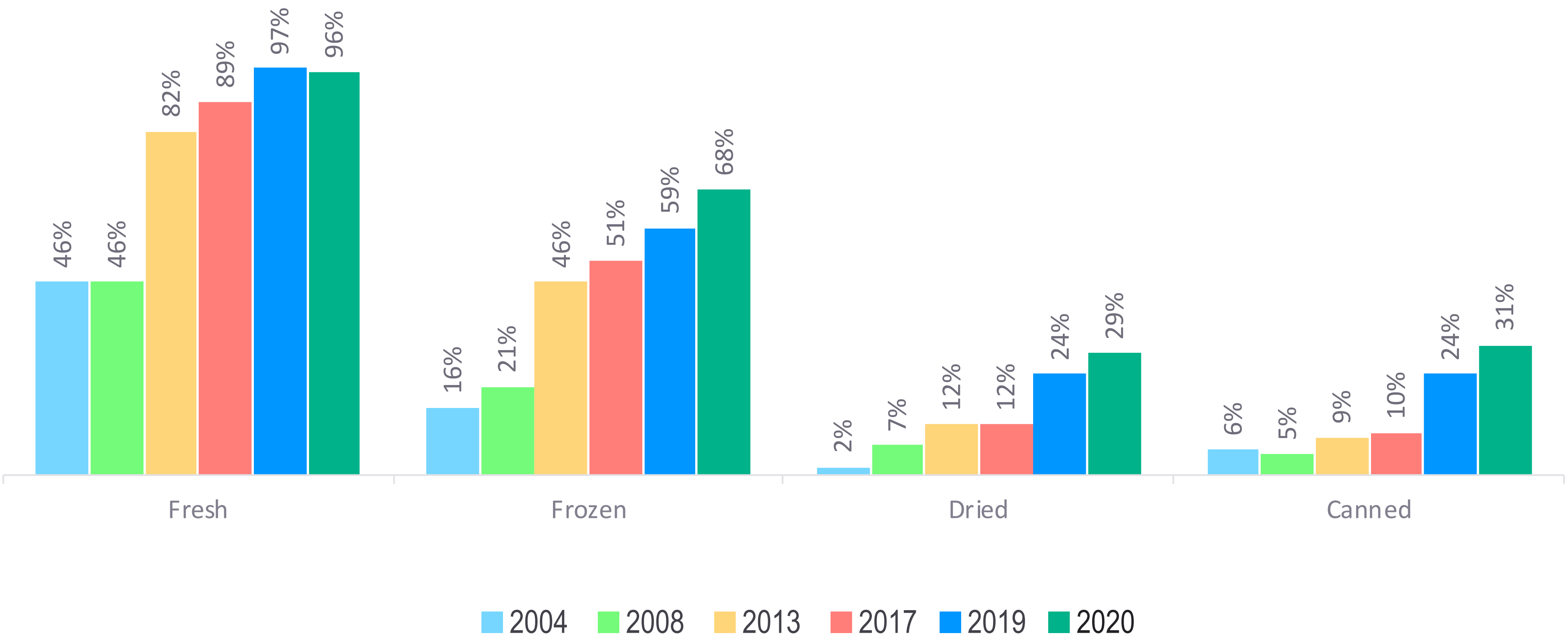
Q6. How many times in the past 12 months have you purchased blueberries in each form below? Please include those purchased either in a store or online. Please do not include those you purchase in a bag mixed with other fruit.

*Note: we have flagged topics with a (+) where we believe there is interesting data that is worthy of longitudinal study or additional investigation

(p<0.05)

Penetration by Form

% having purchased form in past 12 months



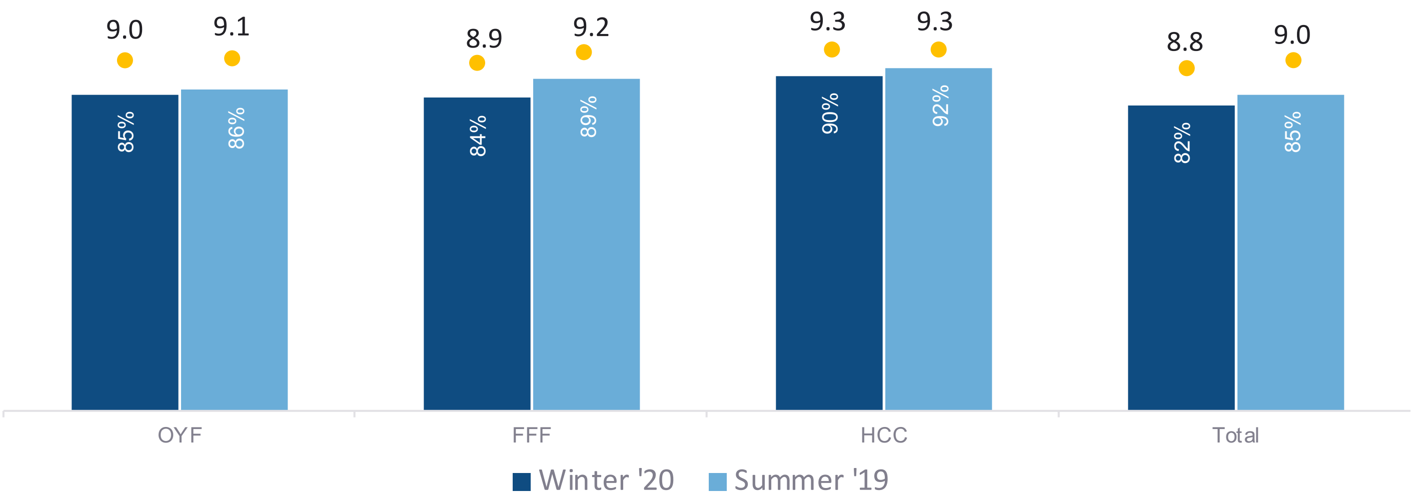
- While penetration of Fresh remains constant at just under 100%, penetration has again increased for all additional forms vs. the summer wave
  - This follows sizeable increases in the alternate forms of Frozen, Dried and Canned in the summer wave
  - The increases in Dried and Canned seen in 2019 seems to be a real trend as they strengthened again in the current wave (caution: still small absolute volume)
- Frozen is by far the dominant 2nd form with 68% of the sample having purchased in the prior 12 months
- Dried and Canned fall well behind Fresh and Frozen but appear to be approaching 1/3 of all users purchasing. [NOTE: the absolute volume generated by these alternate forms is still very low relative to Fresh and Frozen]

Q6. How many times in the past 12 months have you purchased blueberries in each form below? Please include those purchased either in a store or online. Please do not include those you purchase in a bag mixed with other fruit.

($p<0.05$)

Intent to Purchase - Next 12 Months

T3B and Mean – Any Form



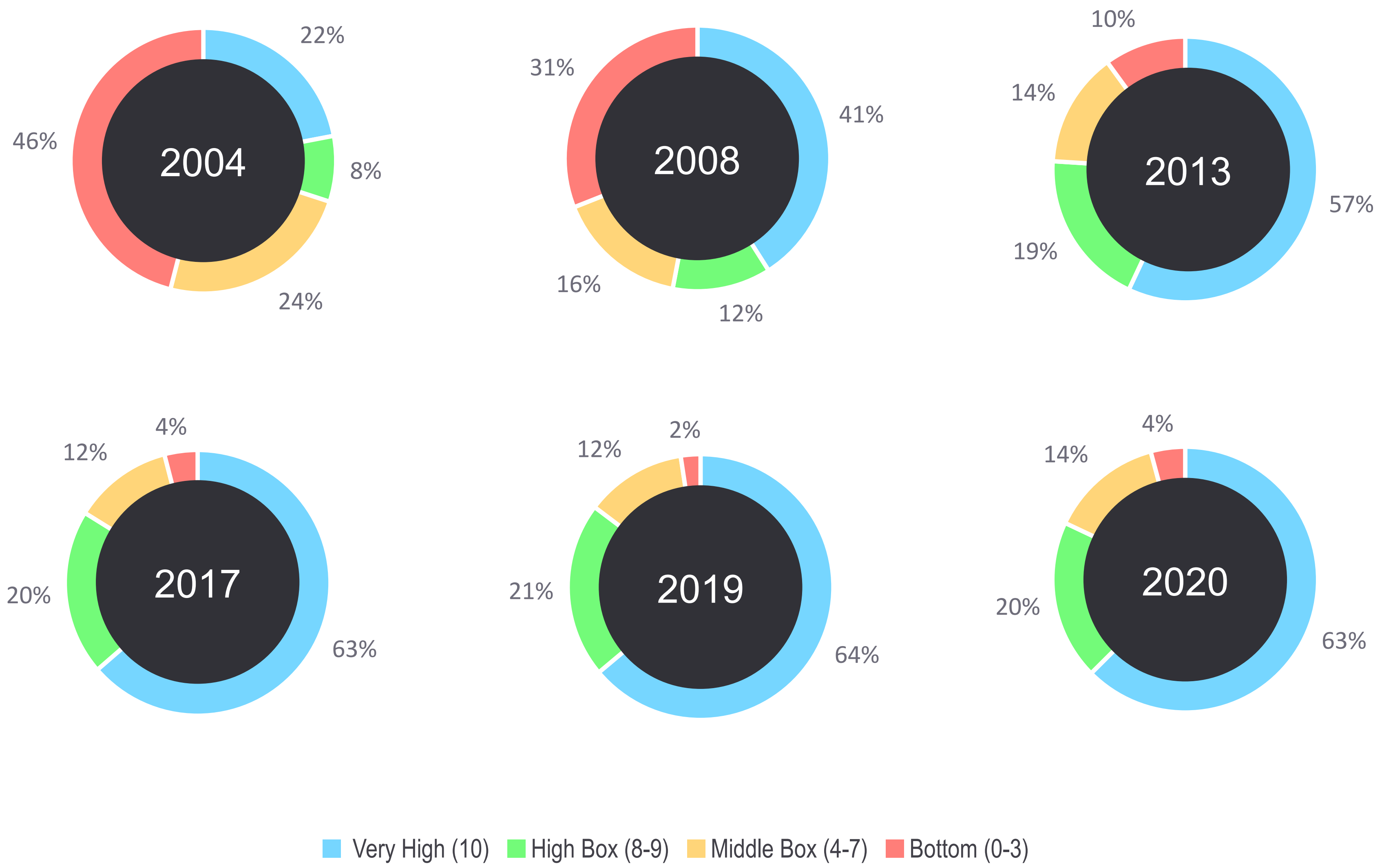
- As the sample is comprised of blueberry consumers, intent to purchase within the next 12 months is high, at well above 80% across all segments
  - T3B intent is holding consistent from the prior wave
  - This is worth watching closely as it appears we are seeing a stabilization in purchase intent after many years of consistent increase

Q3. On a scale of 0 to 10, where 10 means "extremely likely" and 0 means "not at all likely," how likely are you to purchase any form of blueberries (eg. Fresh, Frozen, Canned, or Dried) in the next 12 months? (SELECT ONE)

($p<0.05$)

Intent to Purchase – Next 12 Months

Any Form – by strength of intent



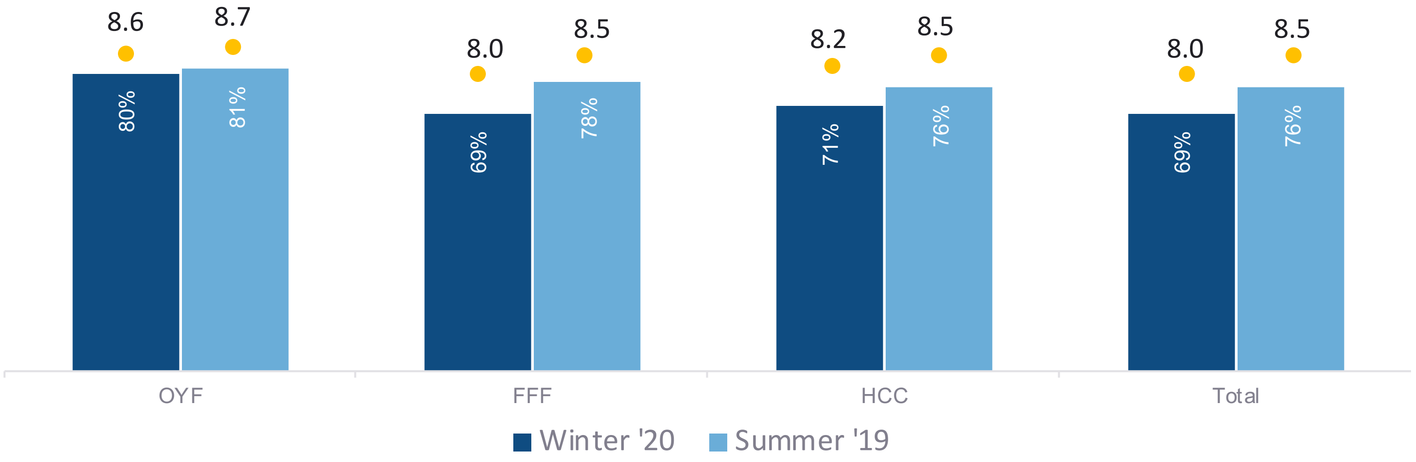
- Purchase intent within next 12 months remains high at 83% T3B
- While it had been steadily increasing over the past 15 years, purchase intent appears to have stabilized over the past three years

Q3. On a scale of 0 to 10, where 10 means "extremely likely" and 0 means "not at all likely," how likely are you to purchase any form of blueberries (eg. Fresh, Frozen, Canned, or Dried) in the next 12 months? (SELECT ONE)

(p<0.05)

Intent to Purchase in the Next Month

T3B and Mean – Any Form



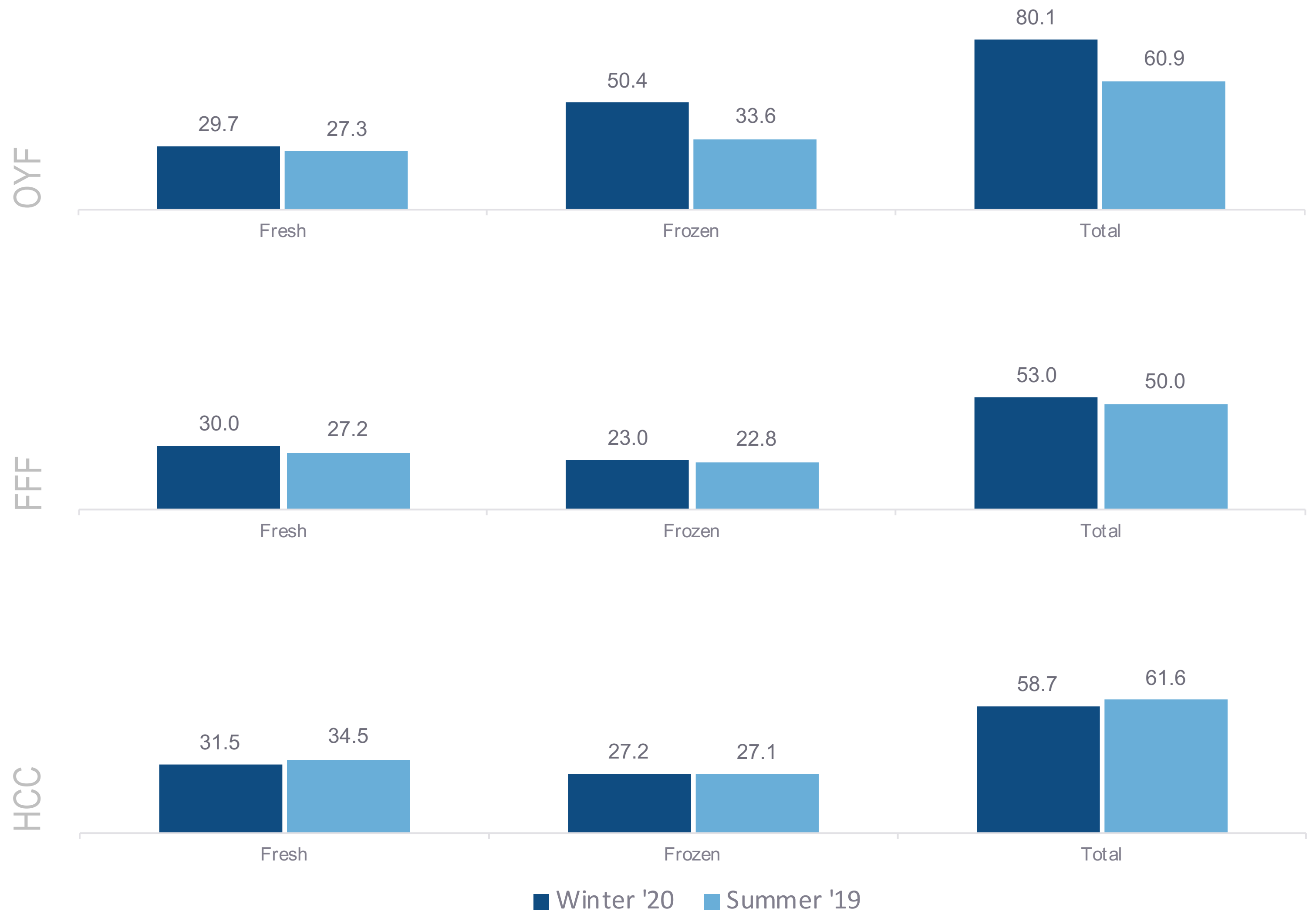
- Purchase Intent within the next month has softened to just under 70%, significantly below 76% in the prior wave
- This could be a seasonal effect with blueberries not as much a top of mind purchase during the winter months
- OYF was the only segment where one-month purchase intent held constant vs. the Summer wave

Q4. On a scale of 0 to 10, where 10 means “extremely likely” and 0 means “not at all likely,” how likely are you to purchase any form of blueberries (eg. Fresh, Frozen, Canned, or Dried) in the next 1 (one) month? (SELECT ONE)

($p<0.05$)

Total Cups– FRESH/FROZEN*

Average Number of Cups Per Year



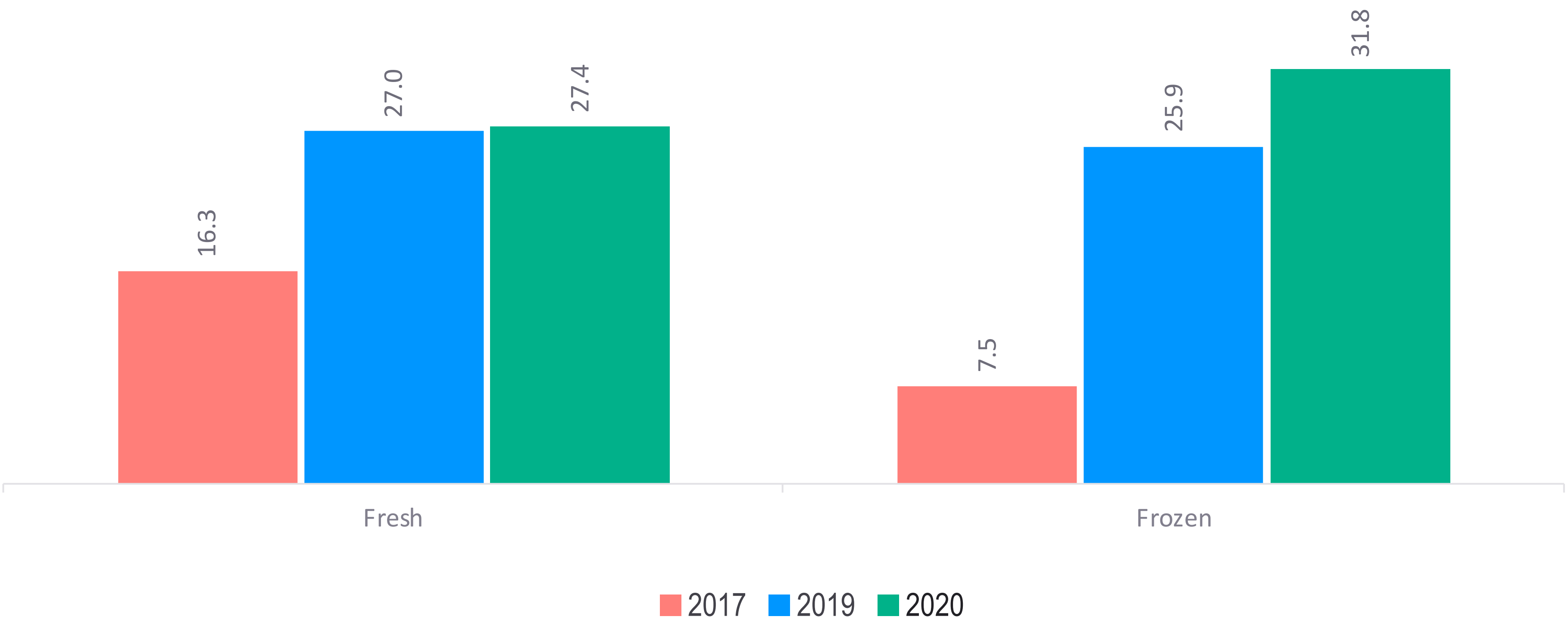
- Total consumption by OYF has really dominated FFF and HCC in this wave, driven entirely by Frozen consumption
- Both OYF and FFF showed increases in total consumption while HCC declined slightly
  - The decline is entirely driven by Fresh as Frozen consumption for all segments held or increased slightly
- All segments consume a comparable number of fresh cups per year at approximately 30
- OYF remains the only segment that consumes more Frozen cups per year than Fresh and OYF consumes considerably more Frozen than any other segment

*This is a calculated volume based on self reported purchasing. It is not an audited measure.

($p<0.05$)

Average Cups By Form

Fresh/Frozen - Calculated from Self Reported Data



- Total Fresh cups held constant while total Frozen cups increased
- For the first time ever, total Frozen cups surpassed total Fresh cups*
  - Driven almost entirely by the OYF segment

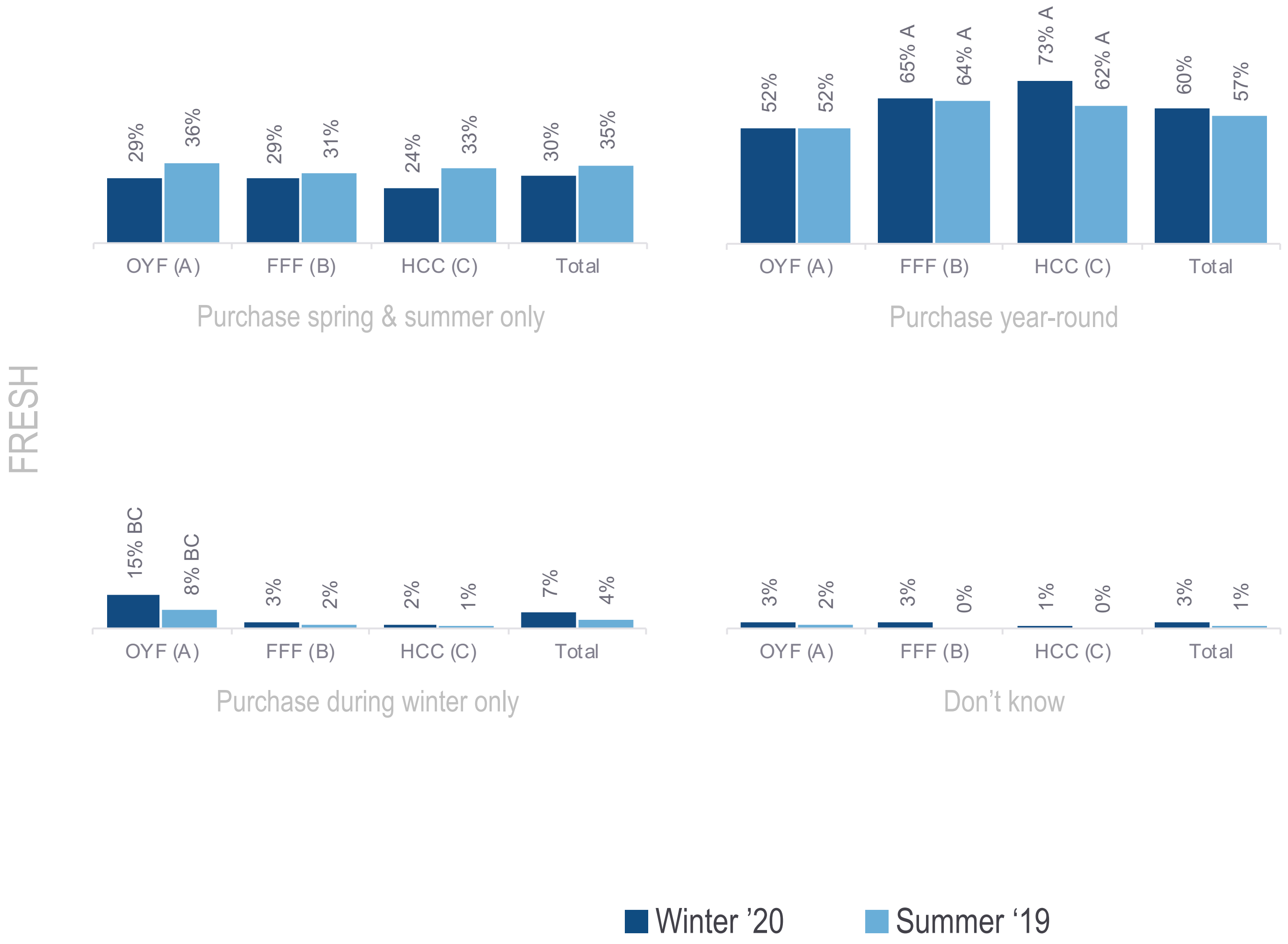
[Note: the method for calculating total cups changed in 2019 which may affect the results vs 2017. The calculation is the same for 2019 and 2020.]

*This is a calculated volume based on self reported purchasing. It is not an audited measure

(p<0.05)

When do Consumers Purchase

When consumers purchase (Fresh)



FRESH

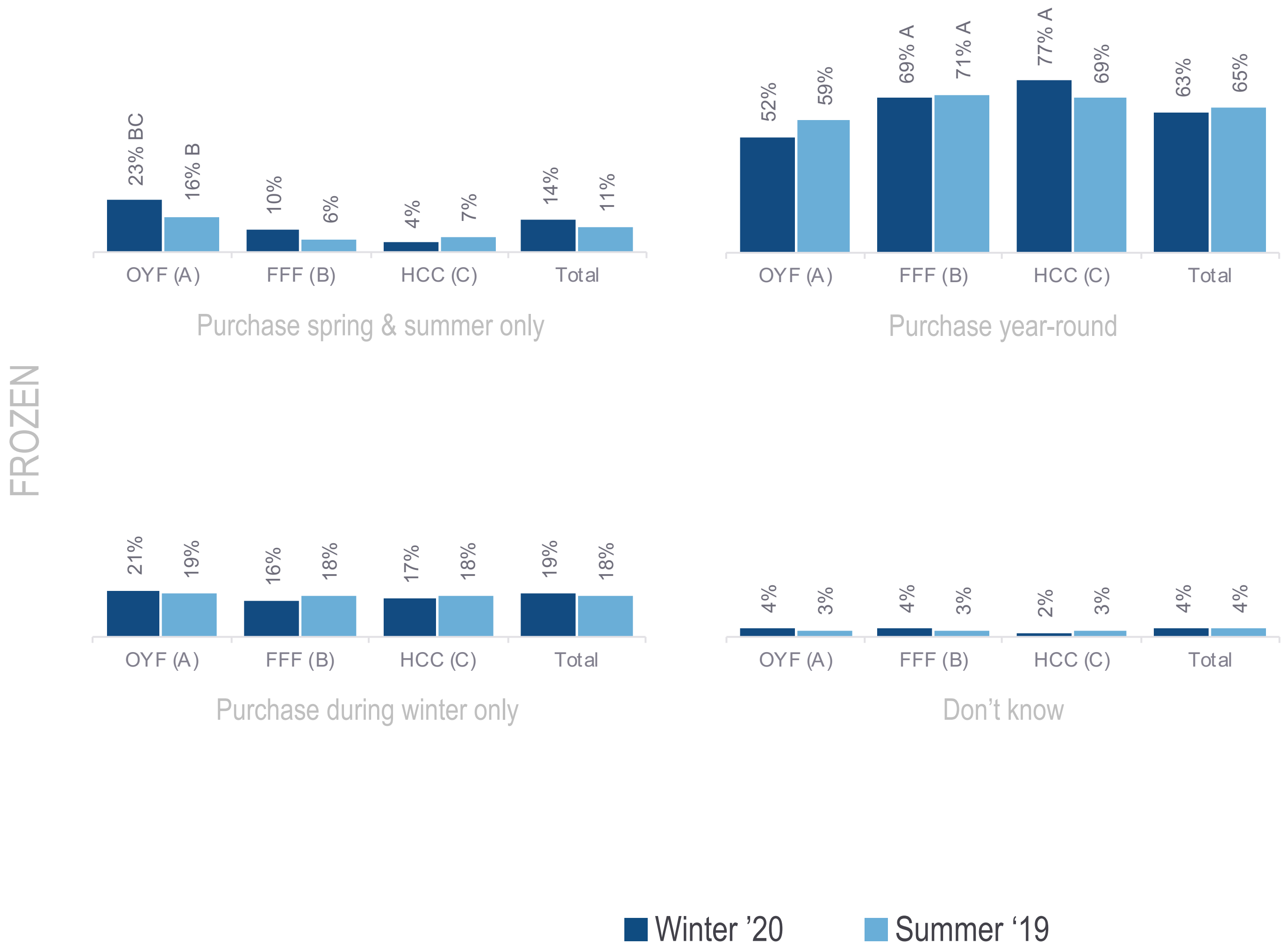
- On average 60% of consumers purchase Fresh blueberries year-round with 1/3 of respondents indicating they purchase only in season.
- FFF and HCC are significantly more likely than OYF to purchase Fresh blueberries year-round. This may be an opportunity for growth within OYF
- HCC is the only segment substantially more likely to purchase both Fresh and Frozen year-round in this wave vs. prior wave

Q11. Thinking about the way you purchase blueberries, which statement describes when you are most likely to purchase? (SELECT ONE)

(p<0.05)

When do Consumers Purchase

When consumers purchase (Frozen)



FROZEN

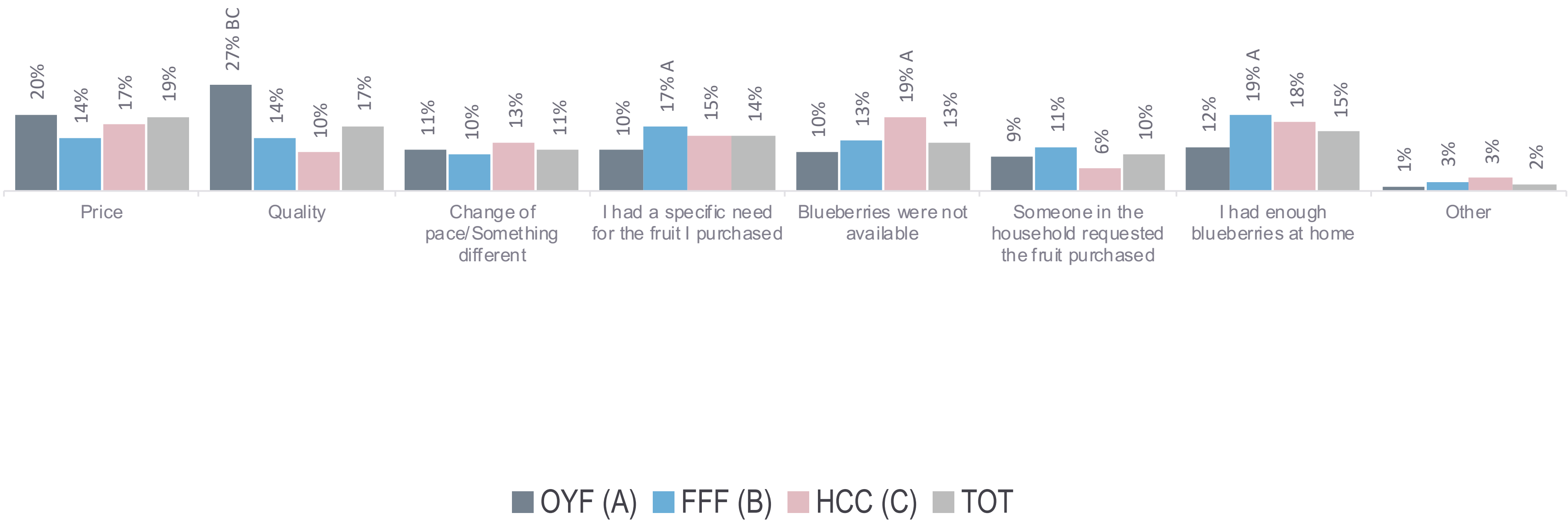
- Of those who buy Frozen, 63% purchase year-round with both FFF at 69% and HCC at 77%, significantly higher than OYF
- While both FFF and HCC purchase less cups of Frozen blueberries per year than OYF, their willingness to buy them all year is significantly higher and may be an opportunity for growth

Q11. Thinking about the way you purchase blueberries, which statement describes when you are most likely to purchase? (SELECT ONE)

(p<0.05)

Reasons for Not Purchasing BBs on More Shopping Trips

% Selecting each Reason



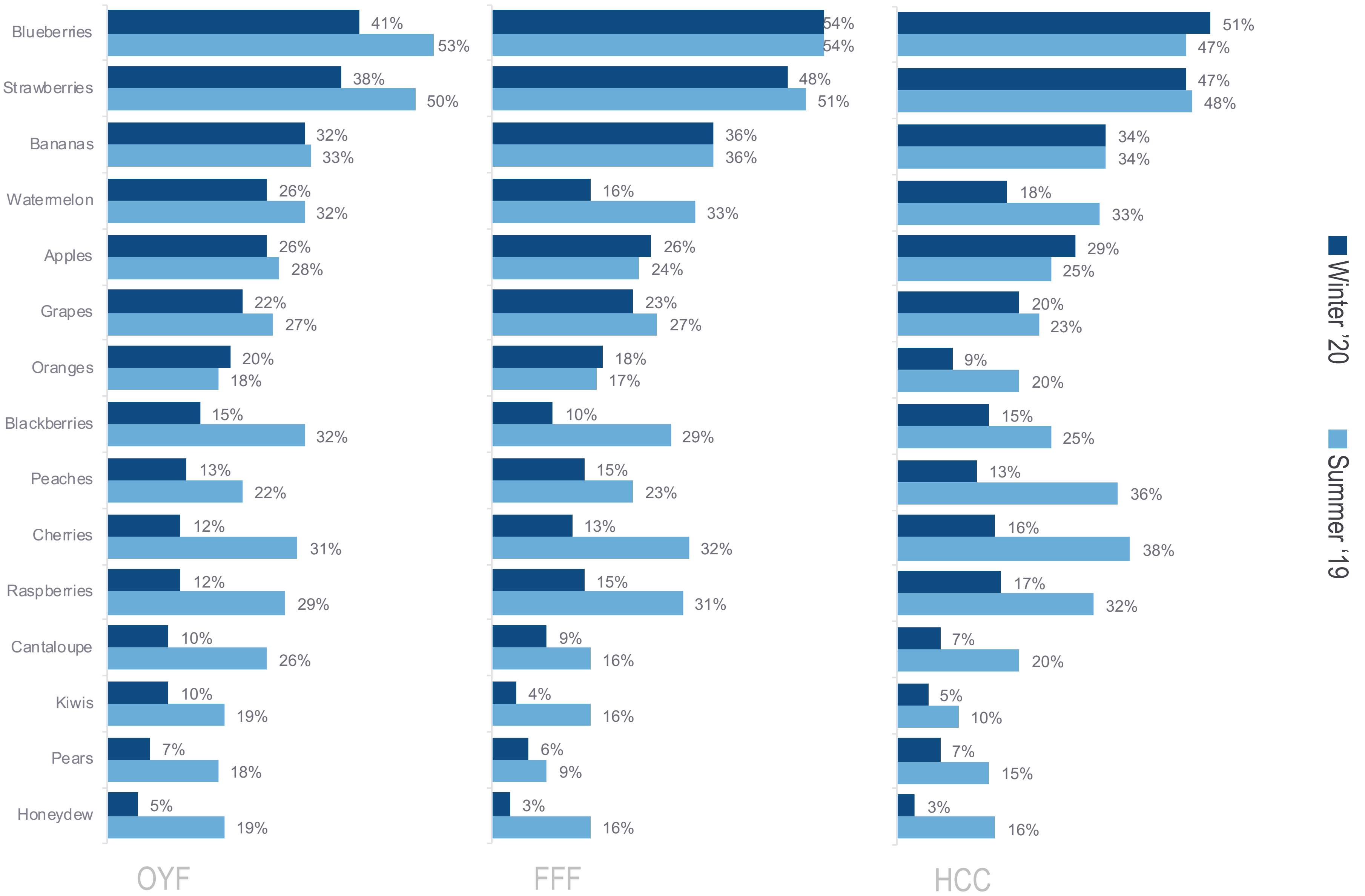
- When asked why they did not buy blueberries every time they purchased other fruit, respondents gave no dominant reason.
- Reasons were generally consistent across segments with <20% selecting each reason
  - OYF were significantly more like than both FFF and HCC to cite quality as the reason for non-purchase (27%)

Q16a. Generally speaking, on those occasions when you purchased other fruit and not blueberries, what was your primary reason for excluding blueberries?

(p<0.05)

Favorite Fruit

% Top 3 Ranking (Buyers)



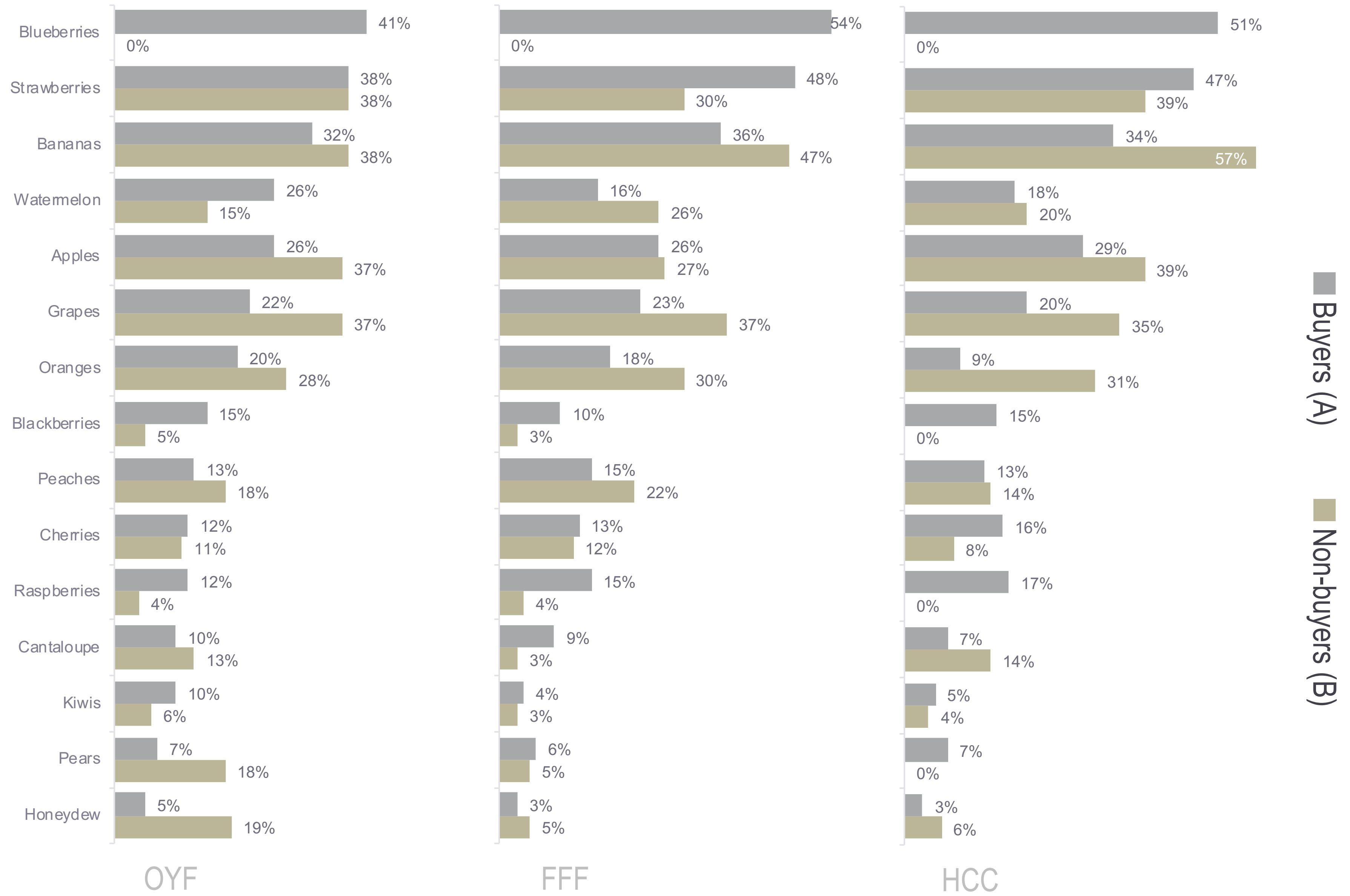
- The top three fruits ranked #1, 2 or 3 are generally consistent by segment and are consistent with the prior wave
  - Expanding to the top 5, we see the seasonal effect as the summer fruit (cherries, watermelon, peaches, blackberries) dropped off, replaced by Apples and Grapes
  - Top 5 Fruits in Winter wave:
    - Blueberries
    - Strawberries
    - Bananas
    - Apples
    - Grapes (watermelon for OYF)
- Blueberries held the #1 top 3 ranking across all segments with Strawberries close behind

Q13. Please rank the following types of fruit from most to least favorite. (RANK TOP 5)

($p<0.05$)

Favorite Fruit

% Top 3 Ranking (Buyers vs Nonbuyers)



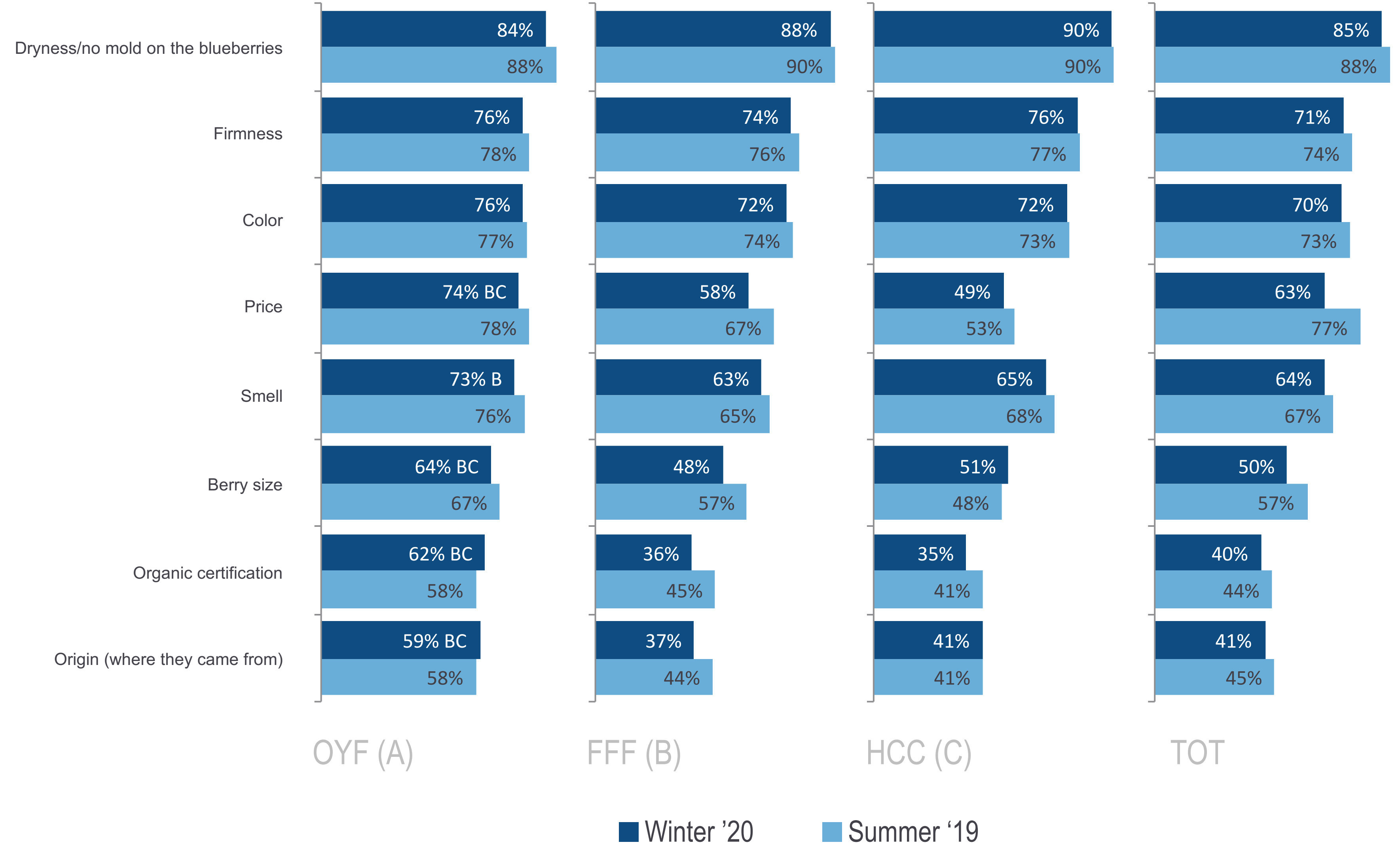
- Comparing blueberry buyers vs. non-buyers, the favorite fruits are very consistent with Bananas replacing Blueberries in the top spot for FFF and HCC non-buyers while strawberries and bananas were tied for #1 for OYF non-buyers
  - Oranges replaced blueberries in the top 5 for non-buyers
- The top five fruits (non-blueberry) ranked #1, 2 or 3 are perfectly consistent across segments for non-buyers
  - Bananas
  - Strawberries
  - Grapes
  - Apples
  - Oranges

Q13. Please rank the following types of fruit from most to least favorite. (RANK TOP 5)

(p<0.05)

Attribute Importance for Purchase Decision

T3B (Fresh)



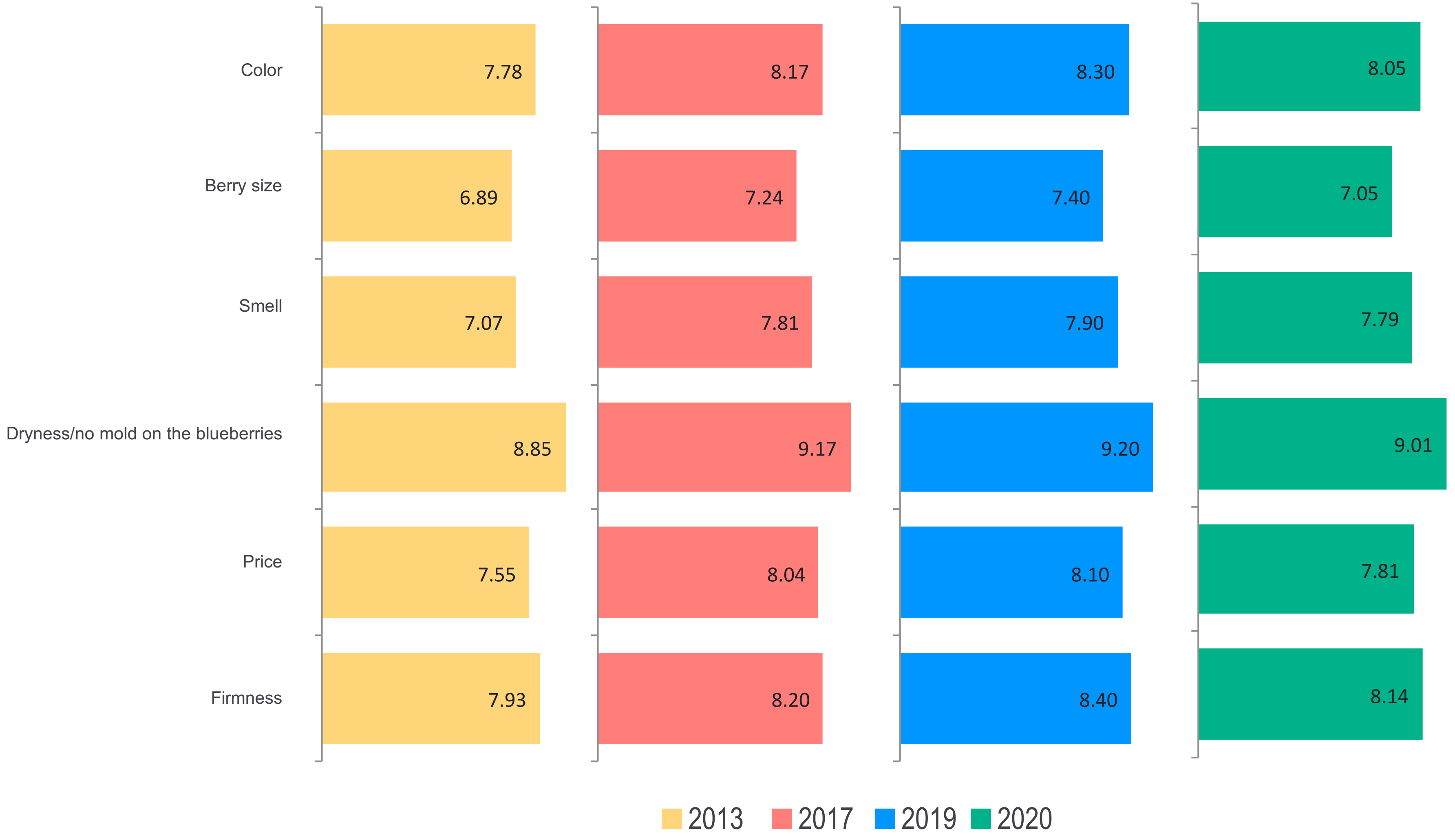
- The attribute ranking for selecting blueberries remained generally consistent from wave to wave
  - In total, we saw the T3B score for Price fall a little, with physical attributes of Firmness and Color coming in higher in the ranking
  - In the absence of a notable market event, we speculate that this is simply a seasonal effect
    - Might be worthwhile to get more information on this topic in the future
- As in the prior wave, less than half of consumers rate Organic certification and Origin as very important factors when making a purchase decision

Q15. On a scale of 0 to 10, where 10 means "extremely important" and 0 means "not at all important," please rate how important each of these attributes is to you in your decision to purchase fresh blueberries.

($p<0.05$)

Attribute Importance for Purchase Decision

Mean Importance Rating (Fresh)



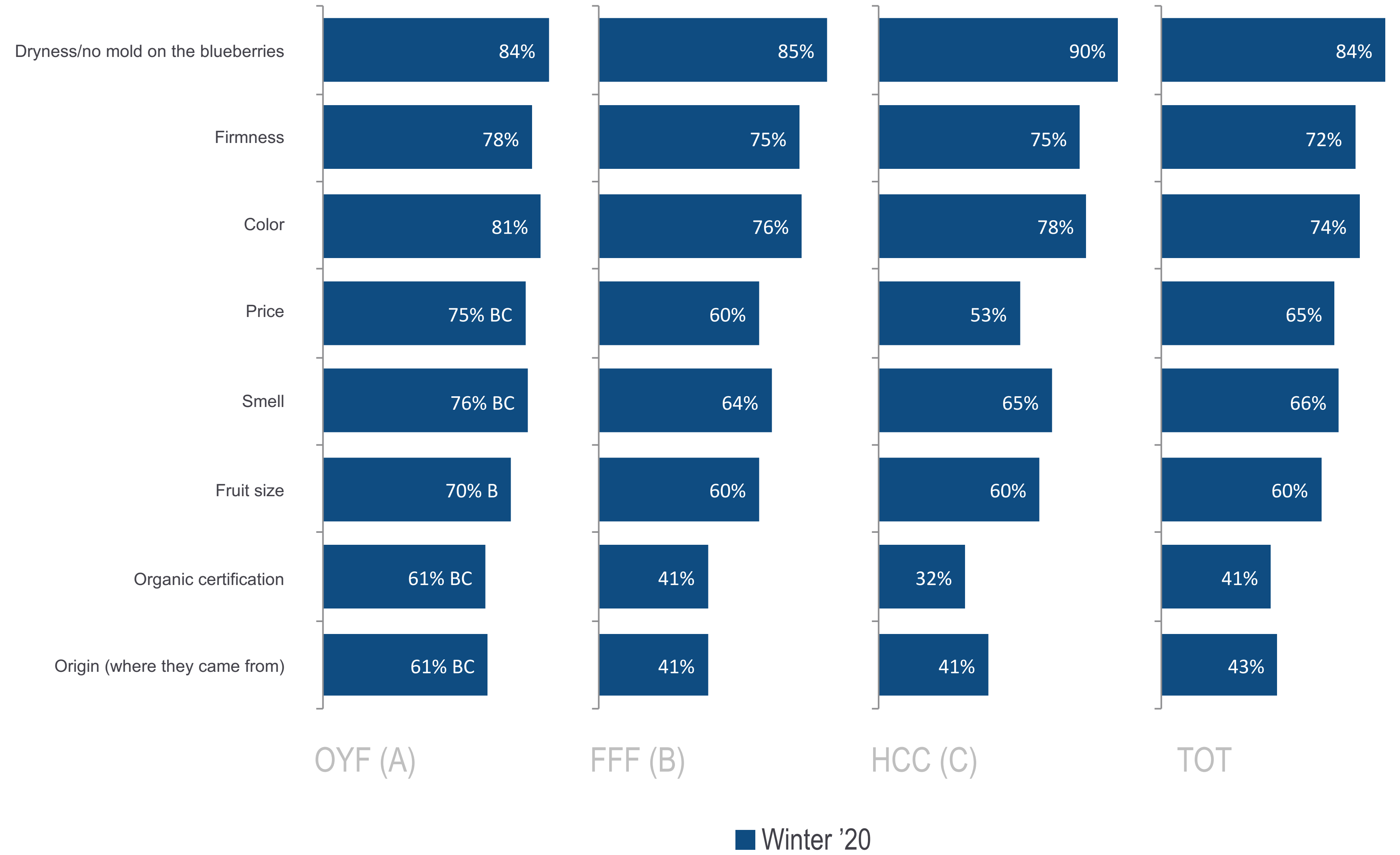
- The mean importance rating for all attributes as well as the relative ranking of attributes has remained consistent over several years
- All five physical attributes plus price play a generally equal role in the purchase decision.
  - Dryness/No Mold has consistently scored the highest in terms of importance
- The new attributes of Organic and Origin added in 2019 scored at the bottom of the ranking.

Q15. On a scale of 0 to 10, where 10 means “extremely important” and 0 means “not at all important,” please rate how important each of these attributes is to you in your decision to purchase fresh blueberries.

(p<0.05)

Attribute Importance for Purchase Decision

Favorite Non-blueberry Fruit - T3B



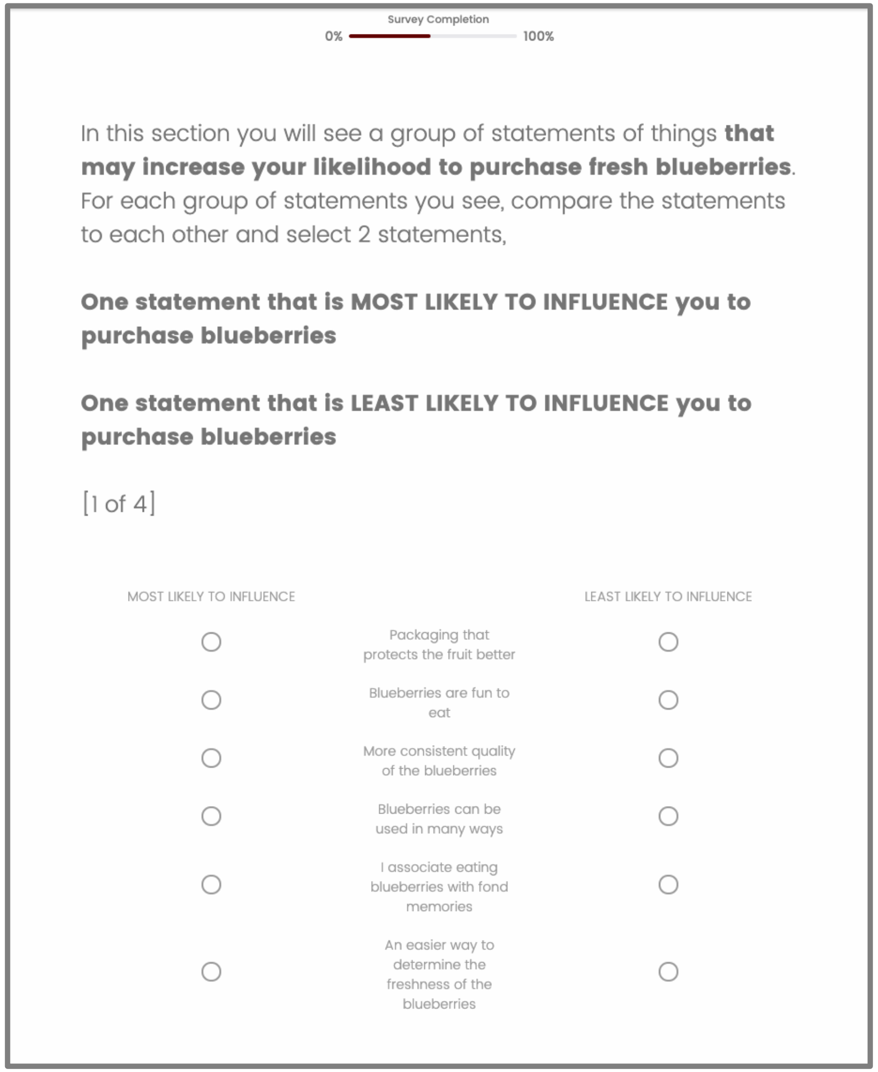
- Attributes rankings for fruit selection of respondents' favorite non-blueberry fruit mirror the ranking of attributes for blueberries
- This suggests fruit is selected in the same way, according to the same criteria and we see no greater emphasis on any given physical feature for blueberries vs. other fruit

Q15a. On a scale of 0 to 10, where 10 means "extremely important" and 0 means "not at all important," please rate how important each of these attributes is to you in your decision to purchase fresh blueberries. (RANK)

(p<0.05)

Drivers of Purchase – MaxDiff Analysis

Factors Most Likely to Increase Purchase


Survey Completion

0% 100%

In this section you will see a group of statements of things **that may increase your likelihood to purchase fresh blueberries**. For each group of statements you see, compare the statements to each other and select 2 statements,

One statement that is MOST LIKELY TO INFLUENCE you to purchase blueberries

One statement that is LEAST LIKELY TO INFLUENCE you to purchase blueberries

[1 of 4]

MOST LIKELY TO INFLUENCE		LEAST LIKELY TO INFLUENCE
○	Packaging that protects the fruit better	○
○	Blueberries are fun to eat	○
○	More consistent quality of the blueberries	○
○	Blueberries can be used in many ways	○
○	I associate eating blueberries with fond memories	○
○	An easier way to determine the freshness of the blueberries	○

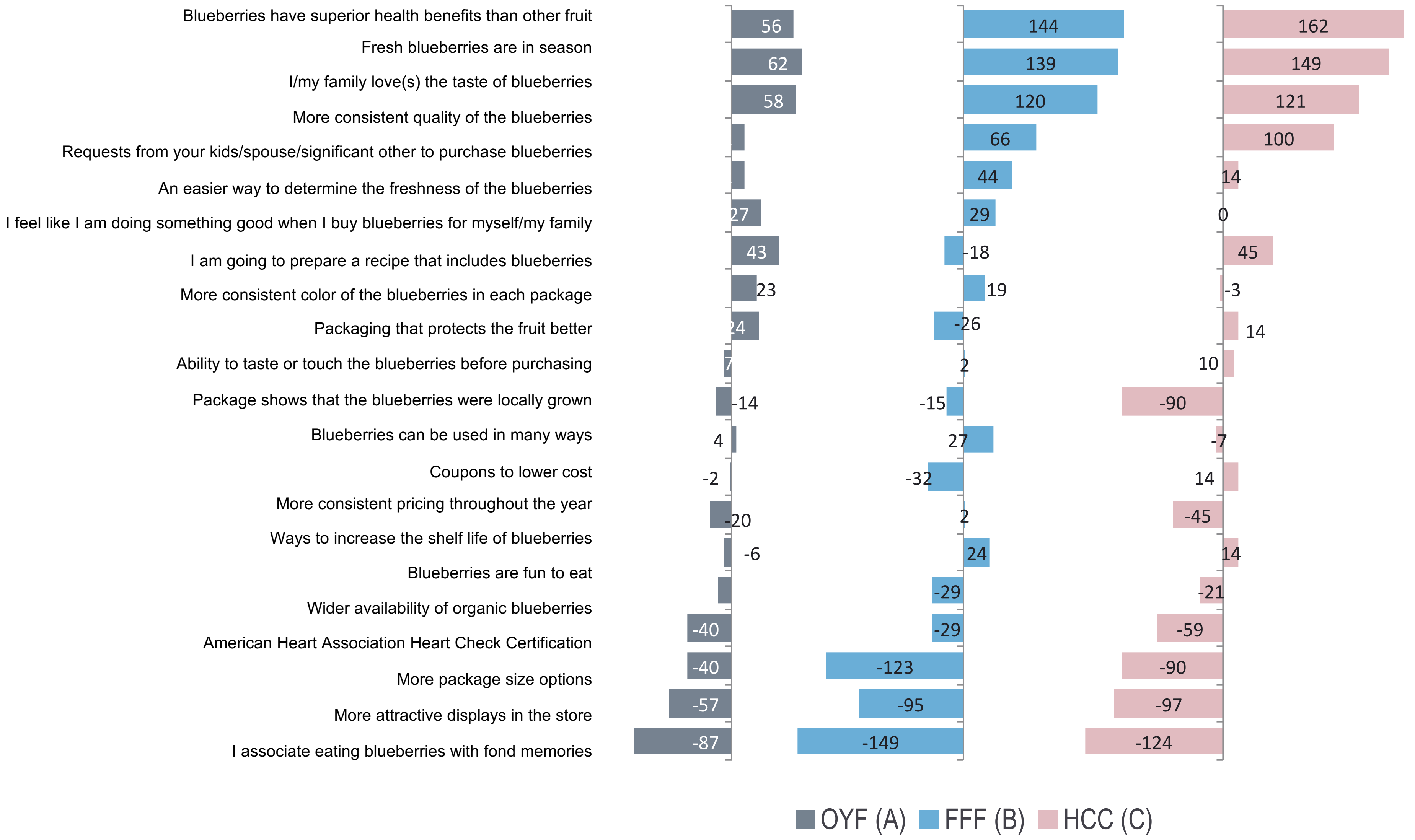
The image illustrates the format of the MaxDiff survey question in order to provide a clearer understanding of how the MaxDiff methodology differs from the standard question-answer format.

Q18. In this section you will see a group of statements of things that may increase your likelihood to purchase fresh blueberries. For each group of statements you see, compare the statements to each other and select 2 statements,

(p<0.05)

Drivers of Purchase

Factors Most Likely to Increase Purchase



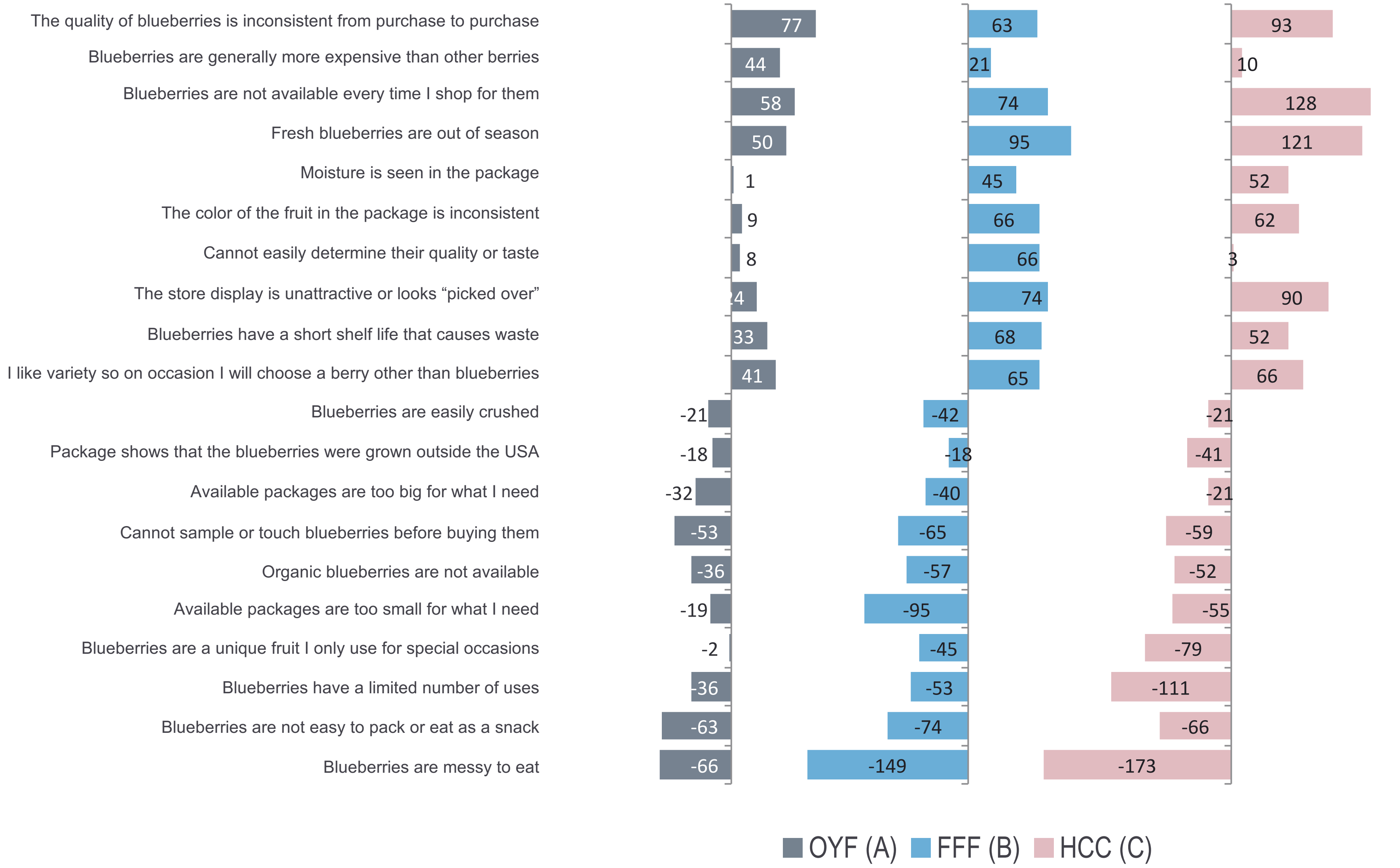
- Across all segments the drivers most likely to increase purchase of blueberries are the same and have remained consistent since the last wave
  - Blueberries have superior health benefits than other fruit
  - Fresh blueberries are in season
  - I/my family love(s) the taste of blueberries
  - More consistent quality of the blueberries
- The availability of organic blueberries and the package showing locally grown were not strong drivers of increased purchase
- Interesting observation on the effect of in-store display: consumers report that they will not be stimulated to purchase due to an attractive display but the inverse is not true and in fact, unattractive displays are cited as a barrier to purchase for FFF and HCC (see chart 26). This would suggest that consumers expect an attractive display and it is noteworthy only by its absence

Q18. In this section you will see a group of statements of things that may increase your likelihood to purchase fresh blueberries. For each group of statements you see, compare the statements to each other and select 2 statements,

(p<0.05)

Barriers to Purchase

Factors most likely to prevent purchase



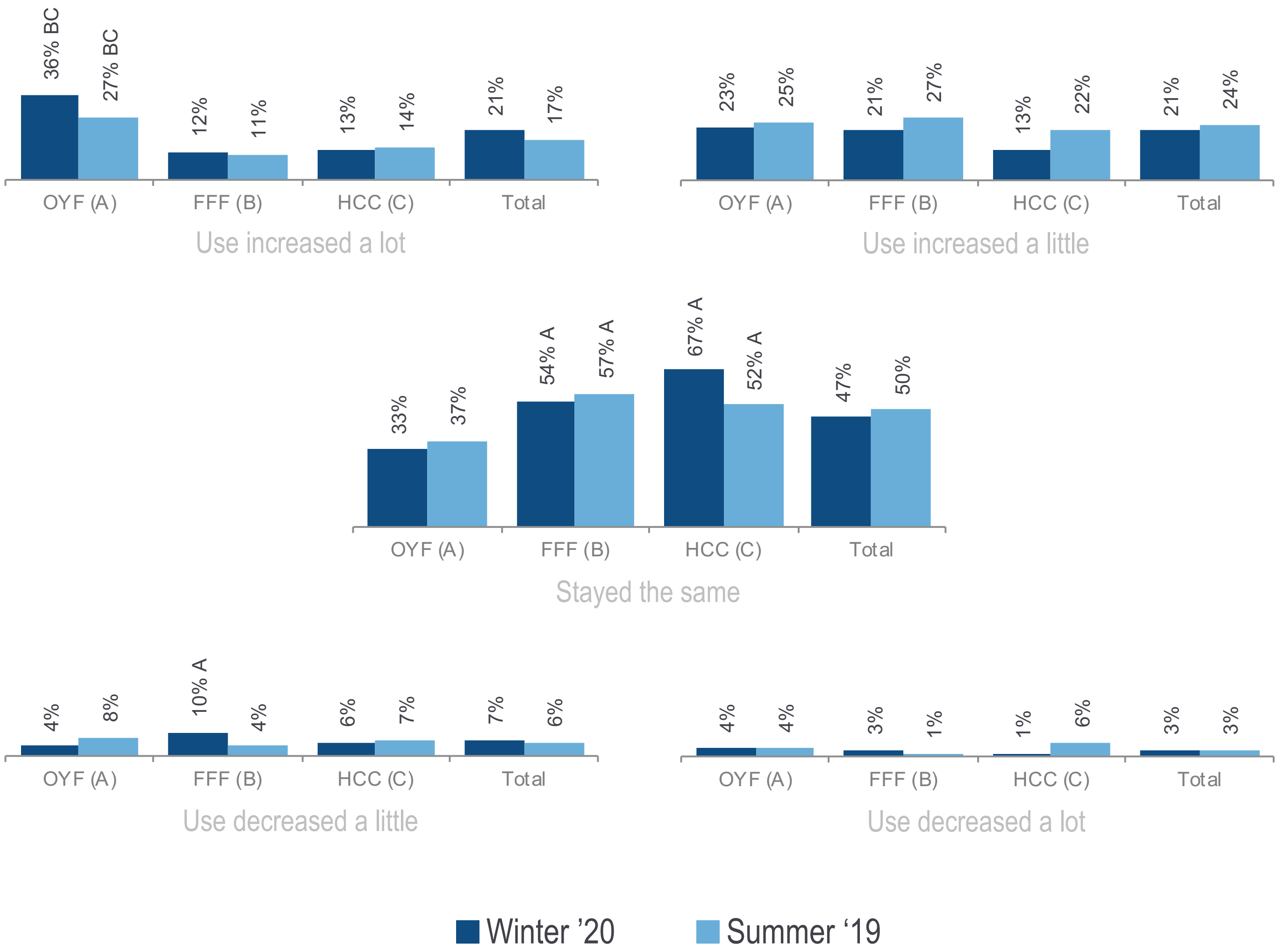
- The barriers to purchase remain generally consistent in ranking vs. the prior wave
- The top barriers for FFF and HCC are Fresh blueberries are out of season and inconsistent availability.
- For OYF, inconsistent quality and availability are the top barriers
- The relative strength of the barrier of the store display being unattractive or looking “picked over” has increased in this study for FFF and HCC, perhaps due to seasonality driving lower quality displays

Q17. In this section you will see a group of statements of things that may reduce your likelihood to purchase fresh blueberries. For each group of statements you see, compare the statements to each other and select 2 statements,

(p<0.05)

Frozen Blueberries Usage

Usage (Frozen Buyers)



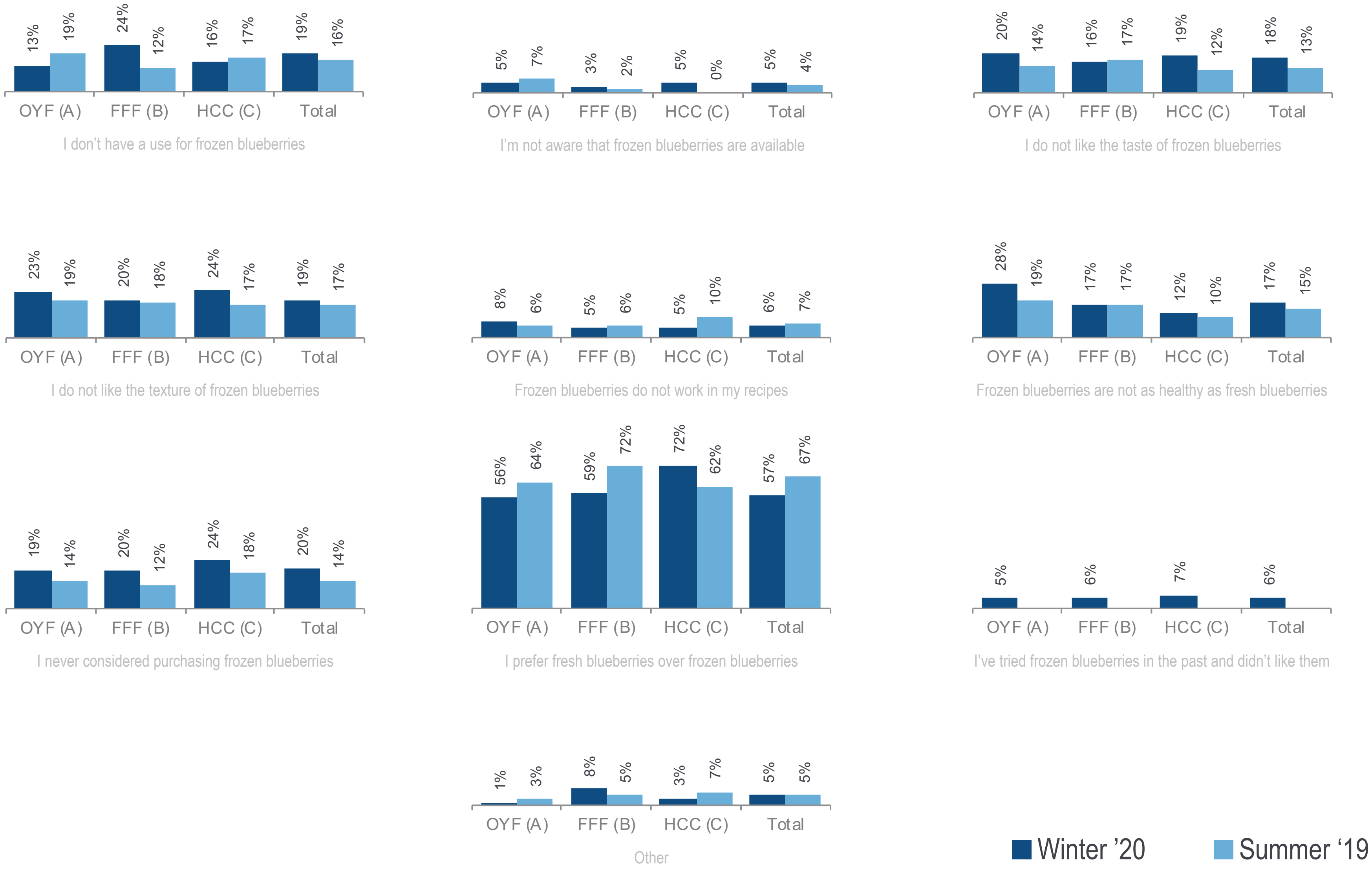
- Use of Frozen blueberries continues to increase with over 40% of respondents saying use has increased a little or a lot
  - OYF driving the increase
  - OYF had a significantly greater % indicating their use has increased a lot over the past year vs. FFF and HCC

Q12. Thinking of the past year, how has your use of frozen blueberries changed, if at all? (SELECT ONE)

($p<0.05$)

Reasons For Not Purchasing Frozen Blueberries

Attitudes (Non-buyers of frozen)



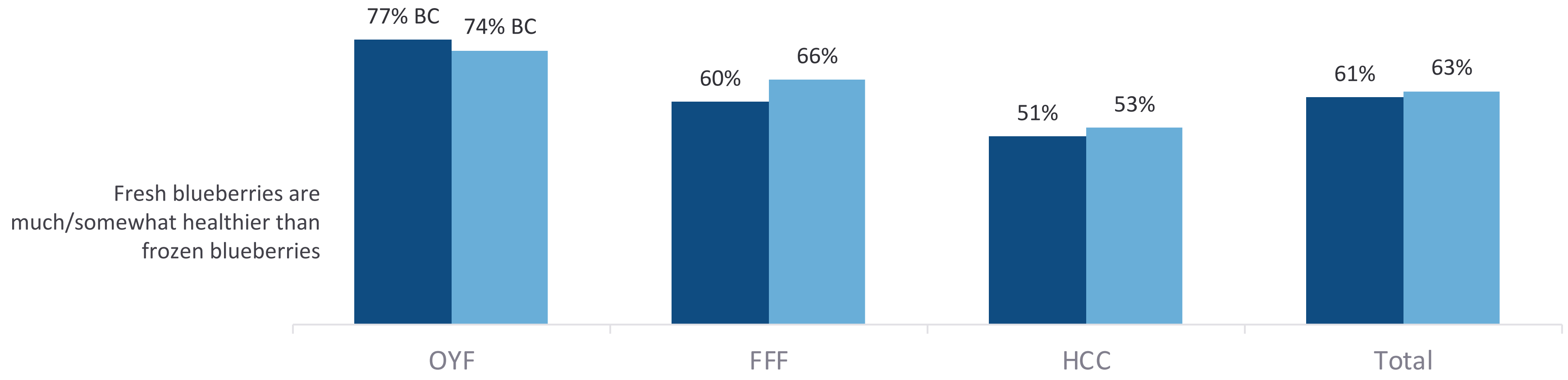
- Nearly 60% of non-buyers of Frozen blueberries report that they don't buy simply because they prefer Fresh
  - While the other reasons for not buying are reported at much lower levels (<20%), some increases were observed in this wave

Q12a. You have indicated that you have not purchased frozen blueberries in the past 12 months, please indicate the reason(s) why this is the case. (SELECT ALL THAT APPLY)

(p<0.05)

Comparing Health Benefits of Fresh/Frozen

T2B and No Difference



	OYF		FFF		HCC		Total	
NO DIFFERENCE	**19.0%**	**23.5%**	**35.1% A**	**31.7%**	**41.4% A**	**42.7%**	**34.3%**	**34.1%**

Winter '20 Summer '19

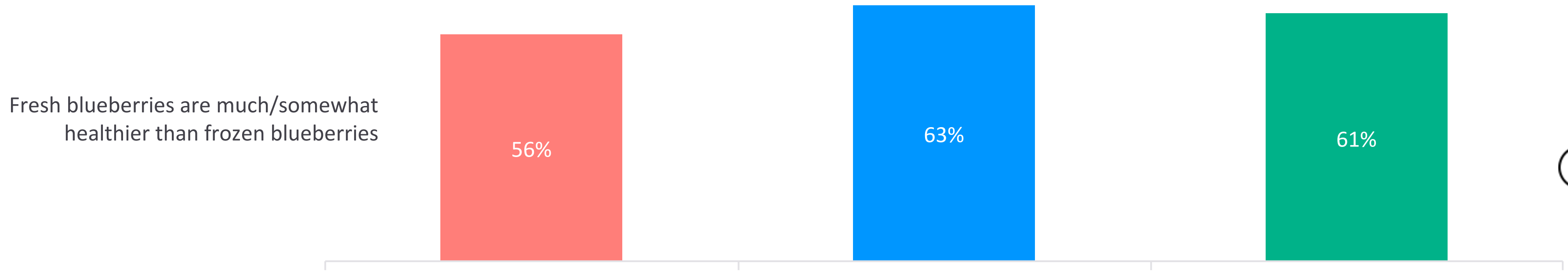
- Responses comparing the health benefits of Fresh vs Frozen very consistent from wave to wave with over 60% of respondents believing Fresh are much/somewhat more healthy than Frozen
  - OYF significantly more likely than the other segments to believe that Fresh are more healthy

Q22. Do you think there is a difference between the health benefits of fresh and frozen blueberries? (SELECT ONE)

($p<0.05$)

Comparing Health Benefits of Fresh /Frozen

T2B and No Difference



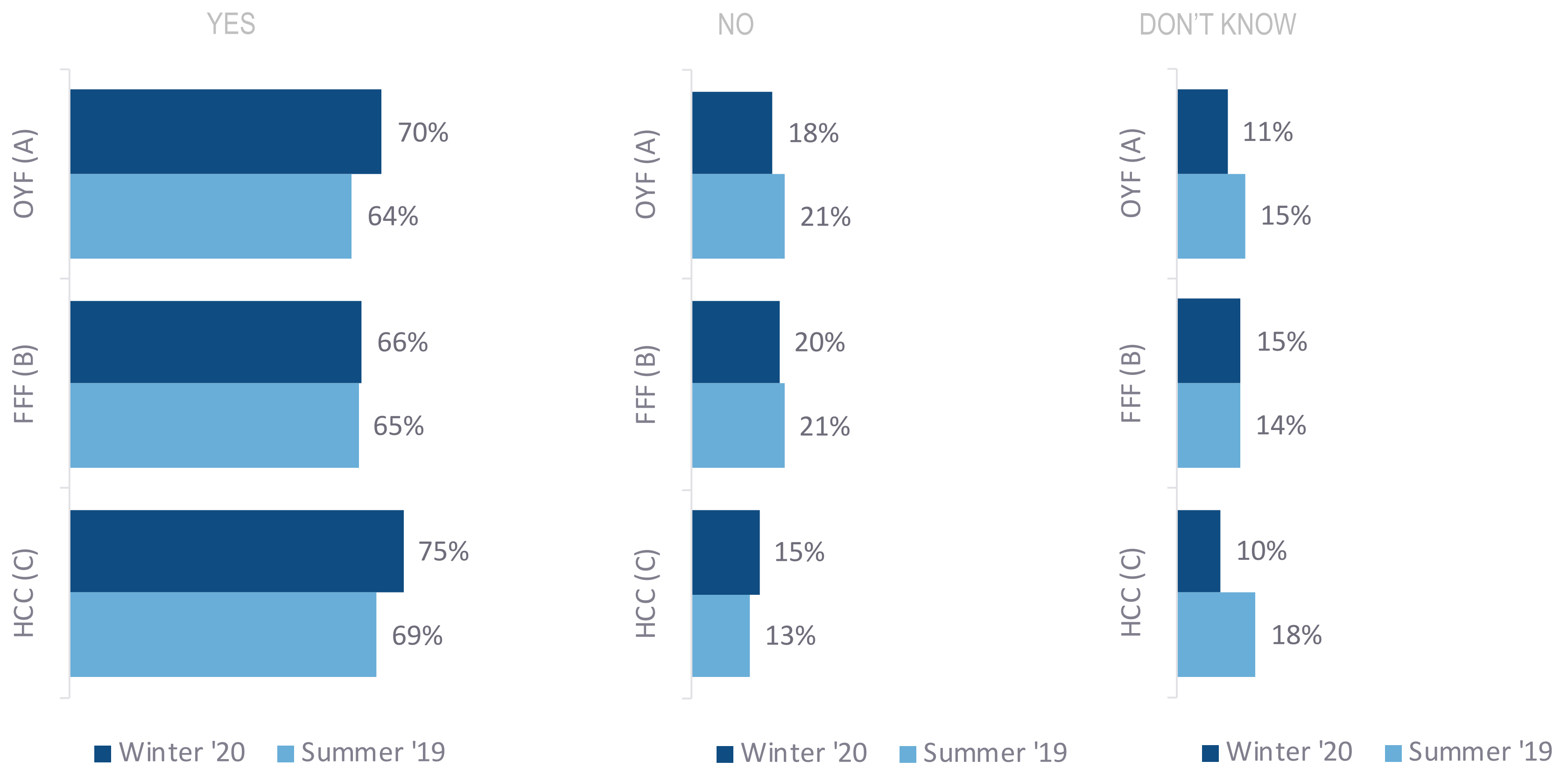
NO DIFFERENCE	42%	34%	34%

- The level of respondents believing that Fresh blueberries are much/somewhat more healthy than Frozen blueberries held relatively consistent from prior wave although it is at a high level of over 60%
- The Frozen segment seems to be growing in spite of these beliefs. To fully capitalize on the opportunity to grow Frozen, these trends will need to be addressed

Q22. Do you think there is a difference between the health benefits of fresh and frozen blueberries? (SELECT ONE)

Awareness Of Health Benefits

% Aware of Specific Health Benefits



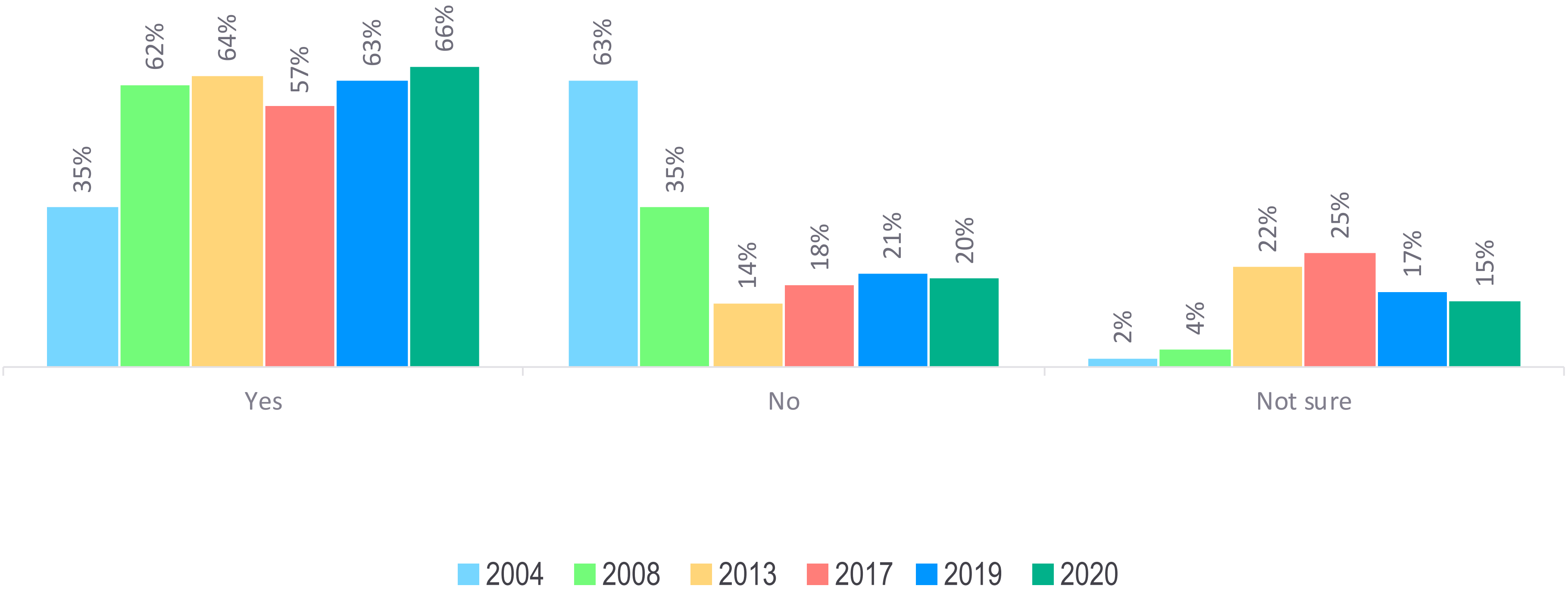
- Both OYF and HCC reported sizeable increases in their awareness of specific health benefits of blueberries vs prior study. FFF remained constant

Q20. Are you aware of any specific health benefits of blueberries? (SELECT ONE)

($p<0.05$)

Awareness Of Health Benefits

% Aware of Specific Health Benefits



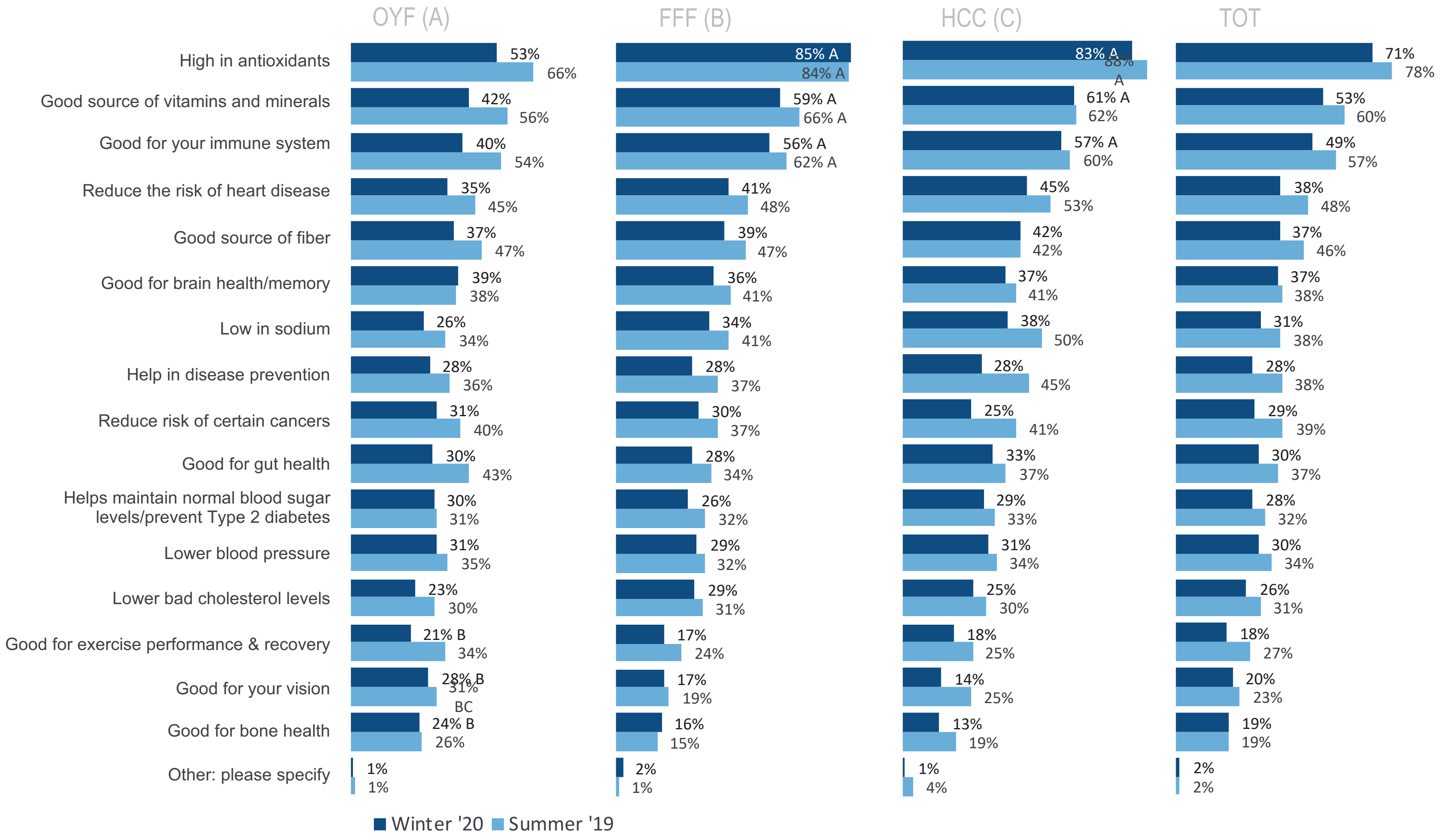
- Awareness of the health benefits of blueberries at 66% has increased slightly vs. prior wave and is an all time high

Q20. Are you aware of any specific health benefits of blueberries?

($p<0.05$)

Health Benefits of Blueberries

Top Health Benefits Selected



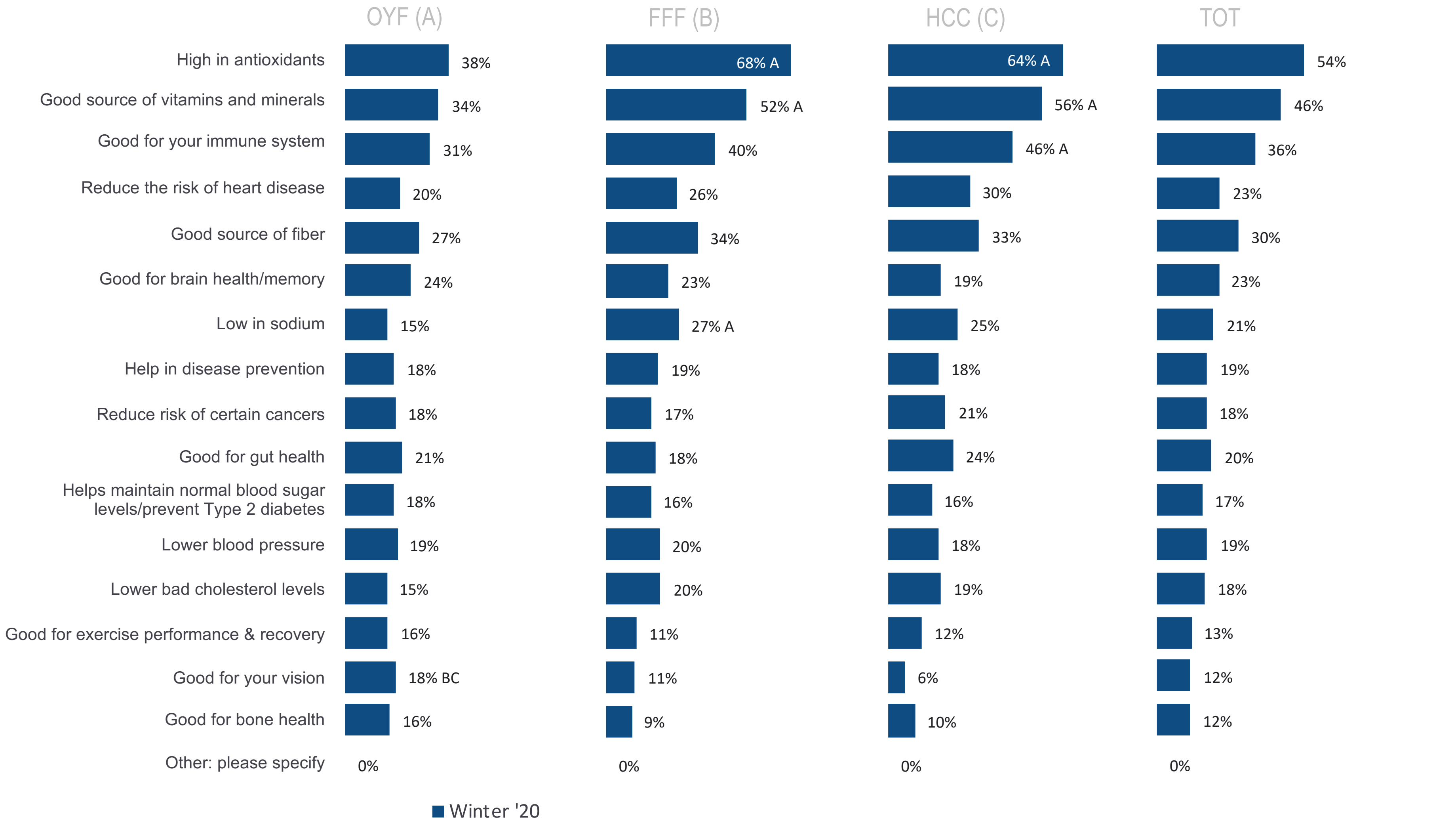
- Top 5 health benefits cited are generally the same across all three segments with FFF and HCC showing a significantly higher degree of knowledge of the 3 top benefits vs OYF
  - High in antioxidants
  - Good source of vitamins & minerals
  - Good for your immune system
  - Reduce the risk of heart disease
  - Good source of fiber
- HCC also report knowing more benefits at higher levels
- The ranking of benefits and the percent of segment choosing them has remained consistent from the Summer wave to the Winter wave

Q21. What do you think are the health benefits of blueberries? (SELECT ALL THAT APPLY)

(p<0.05)

Are the Health Benefits of BBs also Delivered by Other Fruit?

% Reporting that Health Benefits are Delivered by Other Fruit



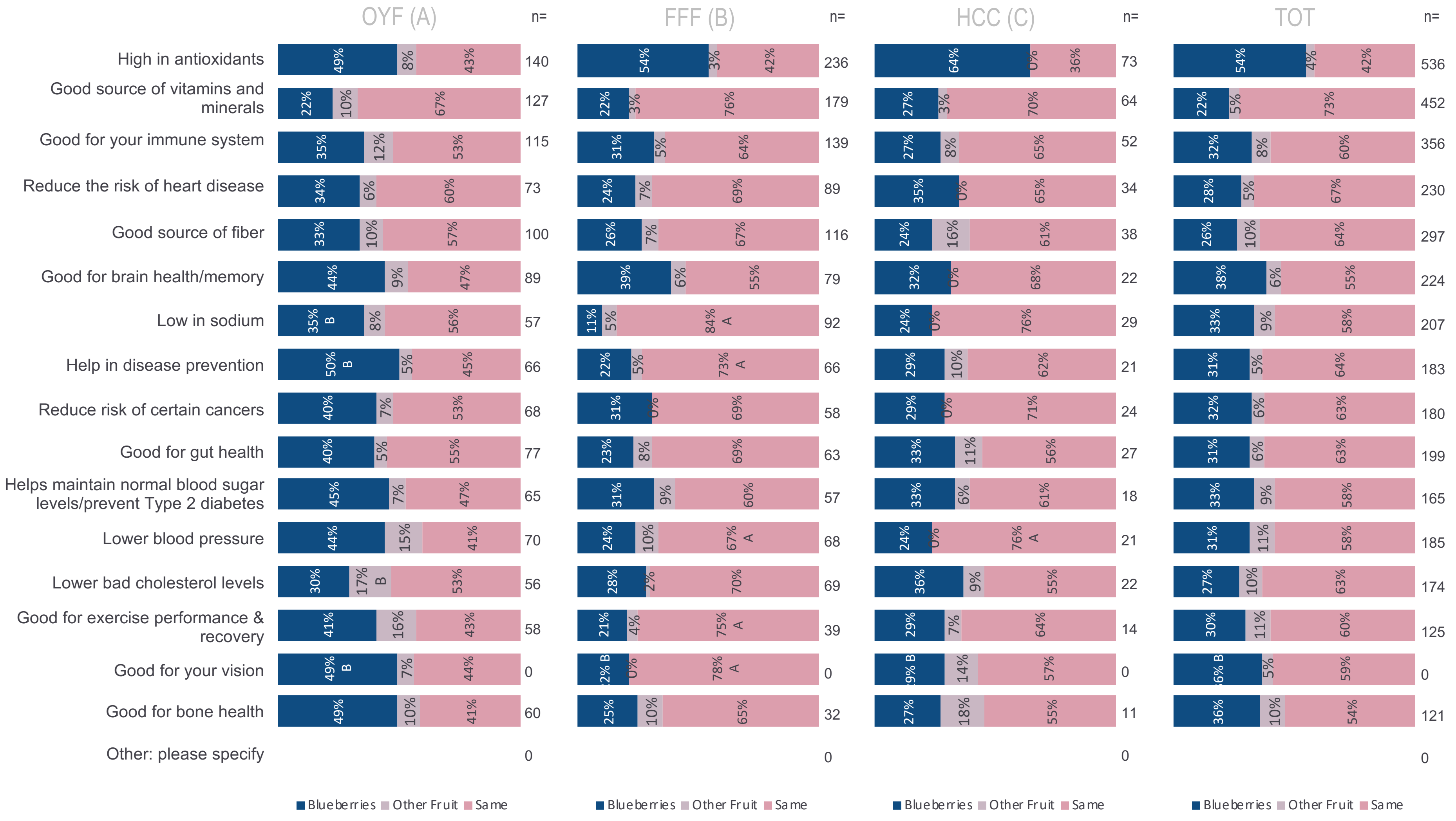
- Health benefits that are believed to be delivered by blueberries are also felt to be delivered by other fruit to a large degree

Q21a. Which of the health benefits you selected as being associated with blueberries do you believe are also delivered by eating other fruit? (SELECT ALL THAT APPLY)

($p<0.05$)

Strength of Blueberry Association with Health Benefits

Which Fruit, if Any, Delivers Benefit Better



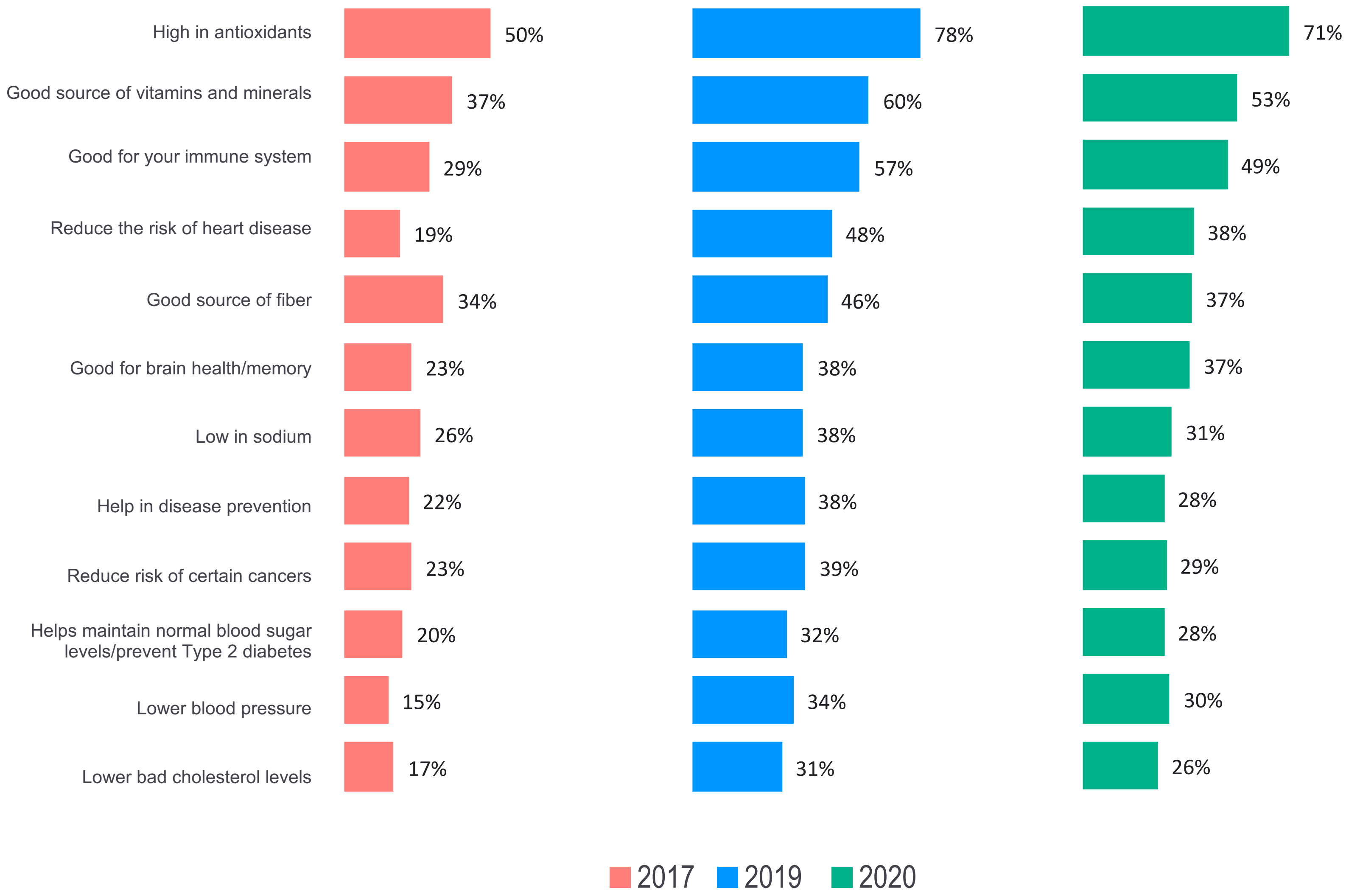
- Approximately ½ of respondents associate these health benefits equally with blueberries and other fruit
- Less than 1/3 of respondents report that blueberries are associated more strongly with these benefits than other fruit (with the exception of antioxidants)
  - OYF tend to report the highest associations for blueberries specifically
- The association blueberries have with antioxidants is noteworthy with over ½ of all respondents saying blueberries are more strongly associated with this benefit than any other fruit
  - This strong association should be the foundation for health benefit communication

Q21b. For each of the health benefits you believe are delivered by blueberries AND other fruits, indicate if you think the health benefit is more strongly associated with blueberries, other fruit, or the same from both.

(p<0.05)

Health Benefits of Blueberries

Top Health Benefits Selected



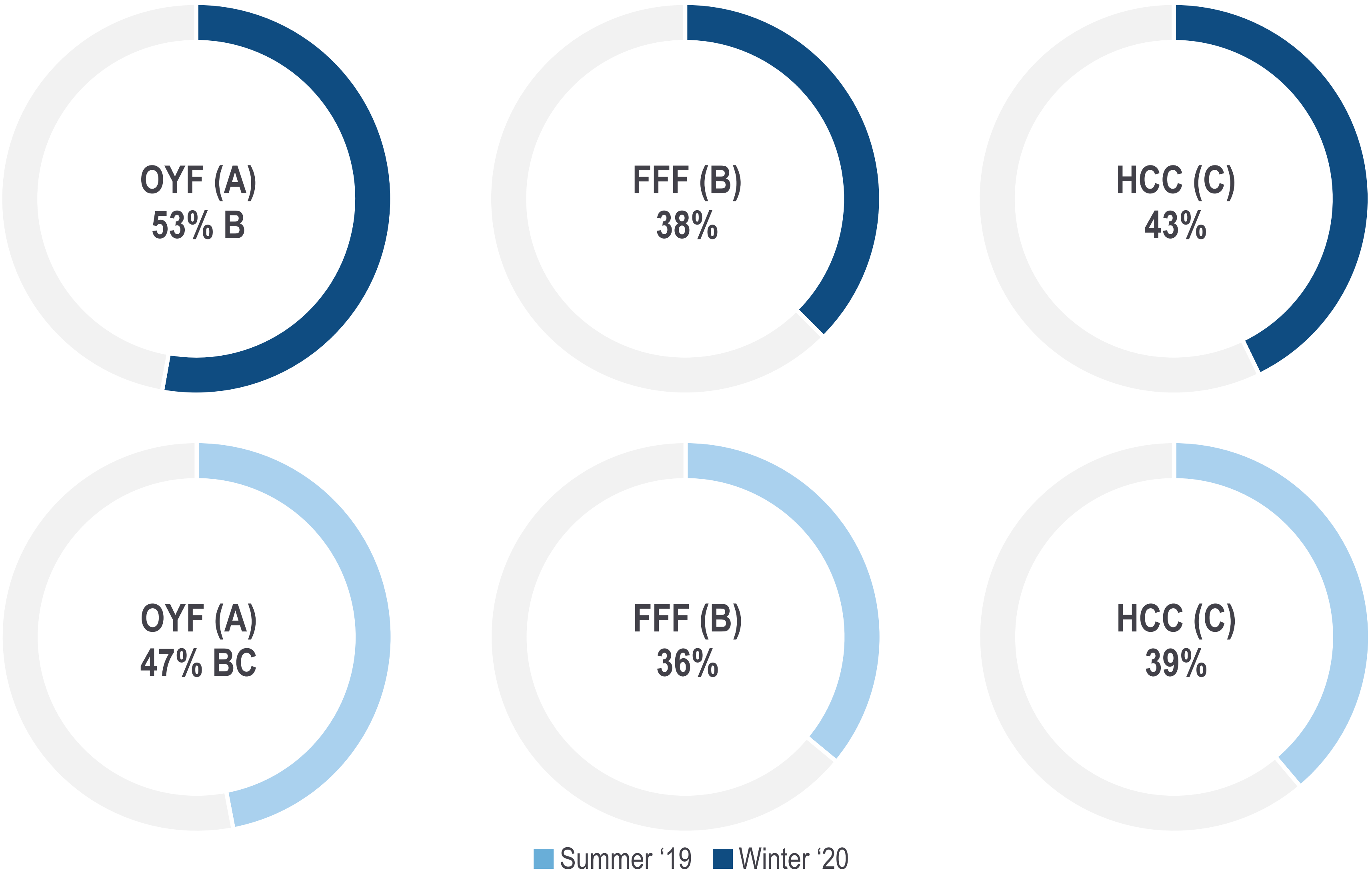
- While in exactly the same rank order, the percent of respondents selecting all health benefits was slightly lower in this wave vs. prior wave, although still well above 2017 levels

Q21. What do you think are the health benefits of blueberries? (SELECT ALL THAT APPLY)

($p<0.05$)

Awareness: News about Health Benefits of Blueberries

% That Have Read, Seen, or Heard News Stories on Health Benefits of Blueberries



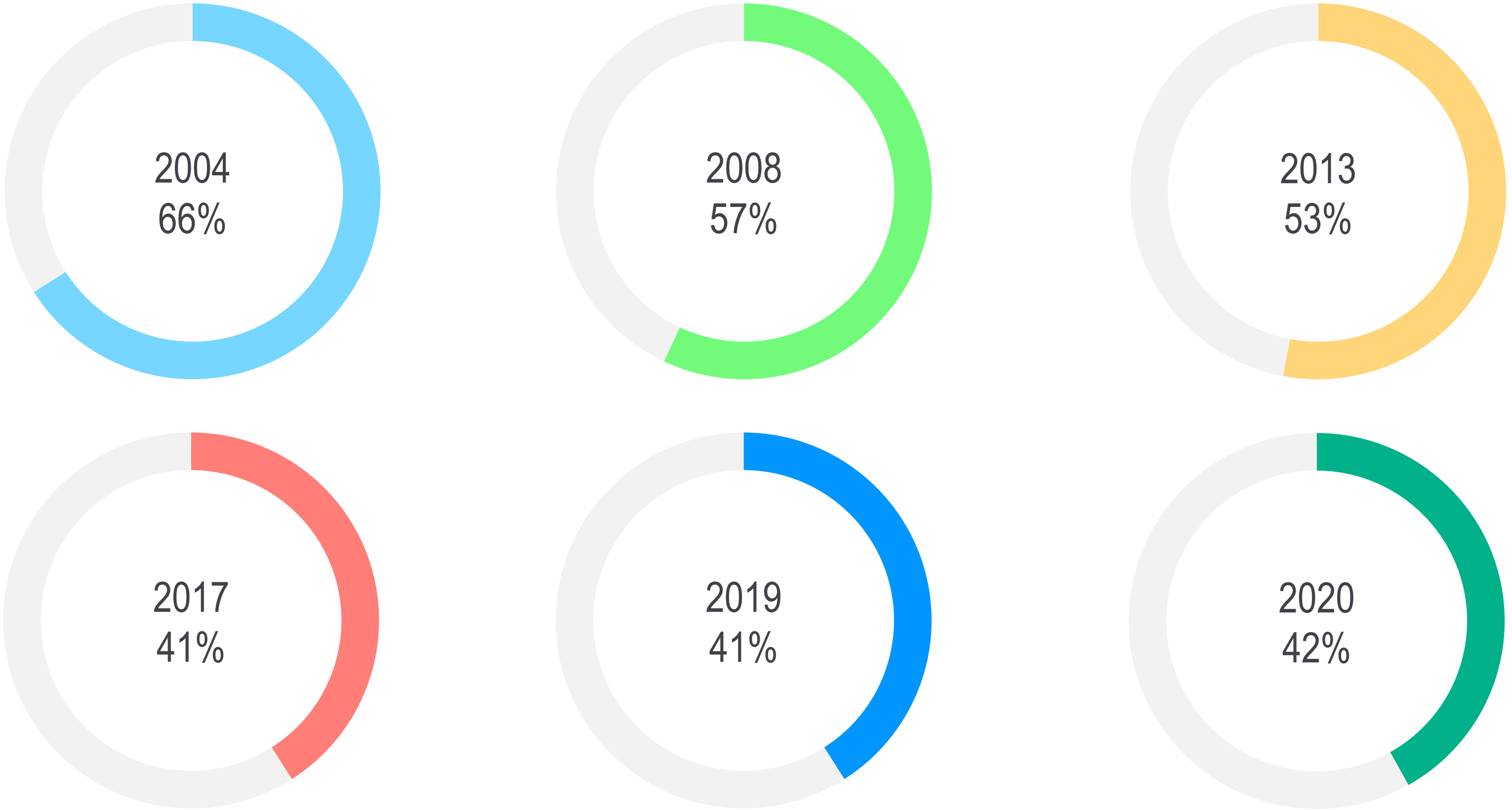
- All segments reported an increase in the awareness of hearing news about blueberries.
  - This may be as a result of more focus during this time of year on improving health and eating better (e.g. New Year's resolutions)
- However, the percent of all respondents indicating they are aware of news is still less than 50% for all segments except OYF
  - OYF have a significantly higher recall of hearing news about the health benefits of blueberries compared to FFF

Q23. Have you read, seen or heard any news stories telling you that blueberries contribute to better health? (SELECT ONE)

(p<0.05)

Awareness: News about Health Benefits of Blueberries

% That Have Read, Seen, or Heard News Stories on Health Benefits of Blueberries



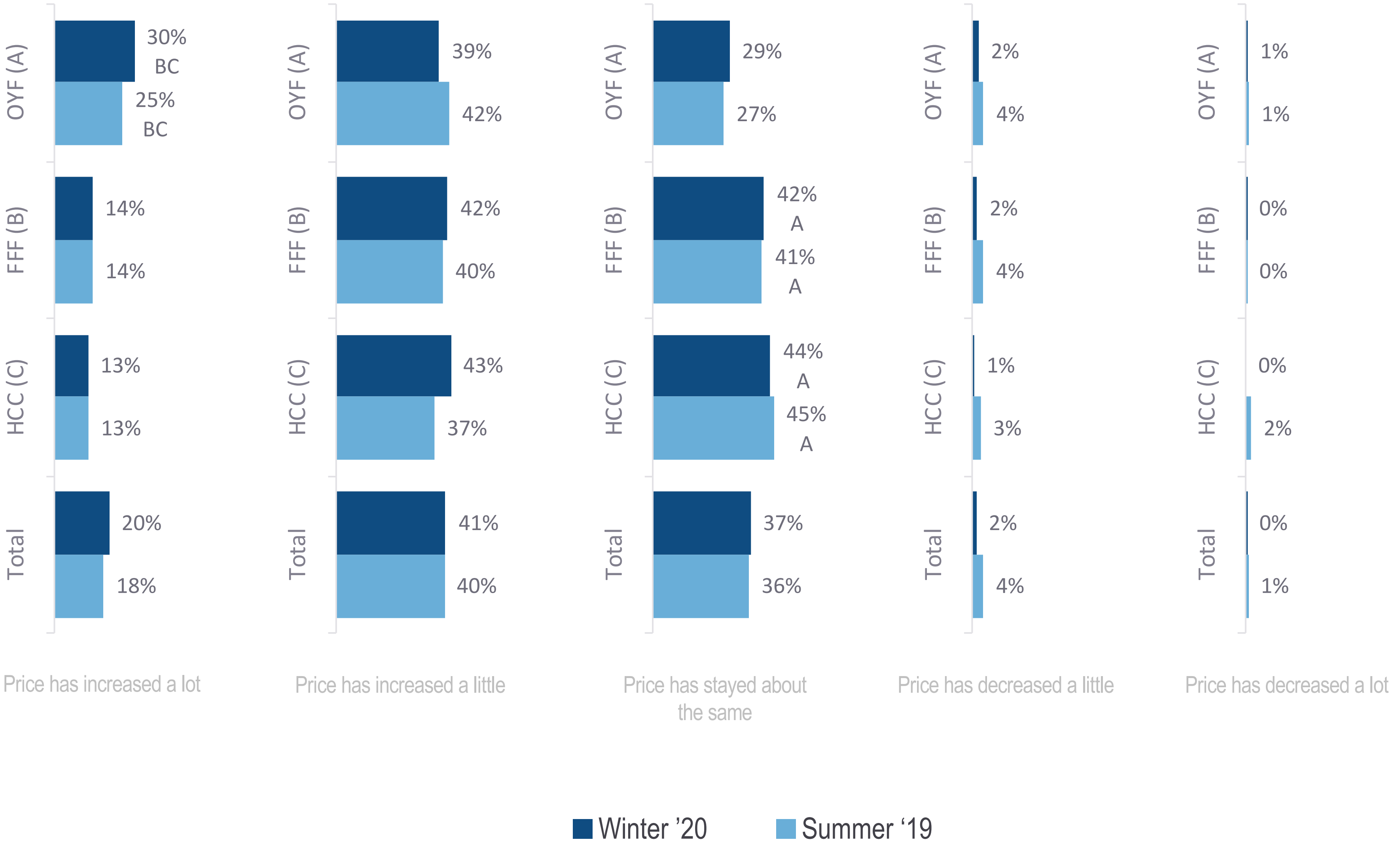
- The awareness of news stories about health benefits has leveled off over the past three years at 42%.
- Note on the prior slide (#37) that the three target segments showed increases in their awareness of news about health benefits so the flatness is driven by non-target segments who are less interested and less likely to pay attention to any news

Q23. Have you read, seen or heard any news stories telling you that blueberries contribute to better health? (SELECT ONE)

(p<0.05)

Price Perception

% Agreement with Statement



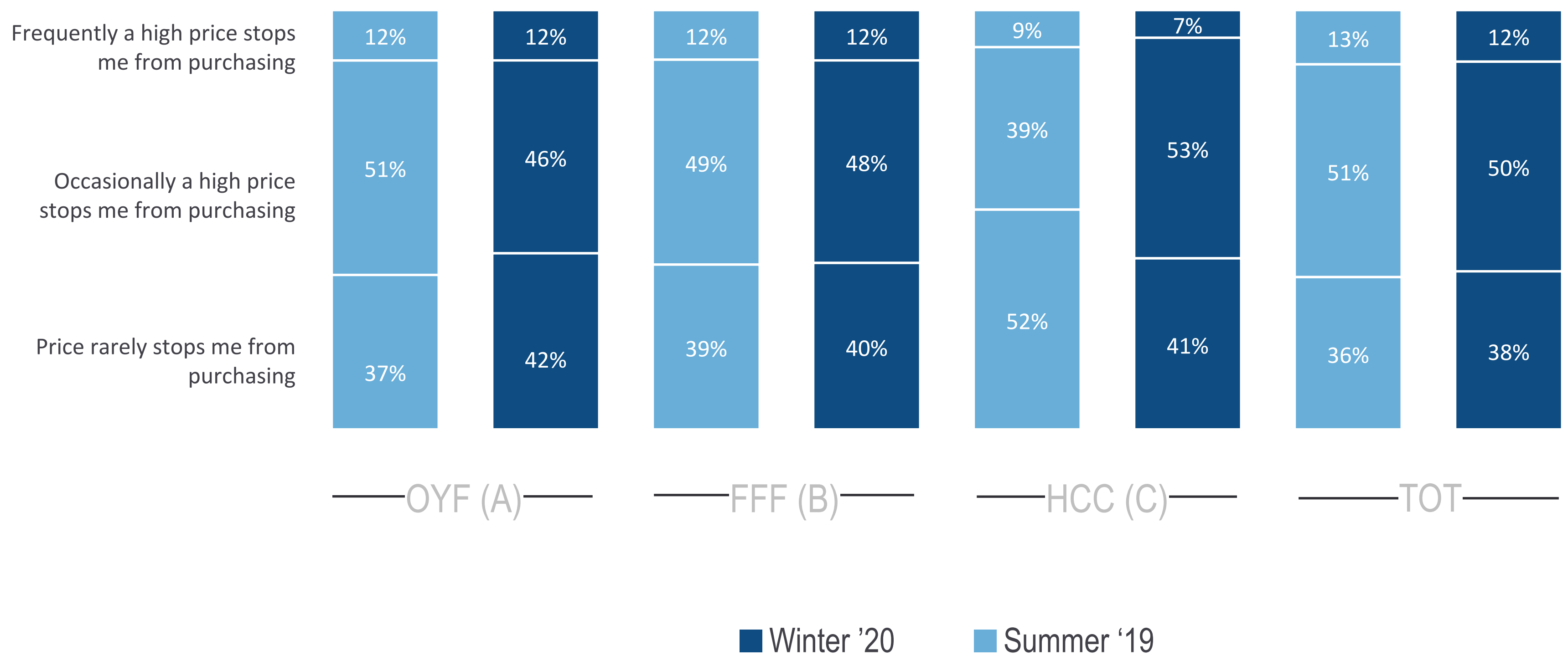
- Consistent with the prior wave, price perception is creeping up with 61% of respondents reporting that price of blueberries has increased a little or a lot
  - OYF and HCC showing the most movement vs. prior wave
- In keeping with their higher price sensitivity, OYF are significantly more likely than FFF and HCC to report that price has increased a lot

Q25. Over past several purchases what have you noticed about price of blueberries? (SELECT ONE)

(p<0.05)

Blueberry Value

Impact of Price on Purchase Decision



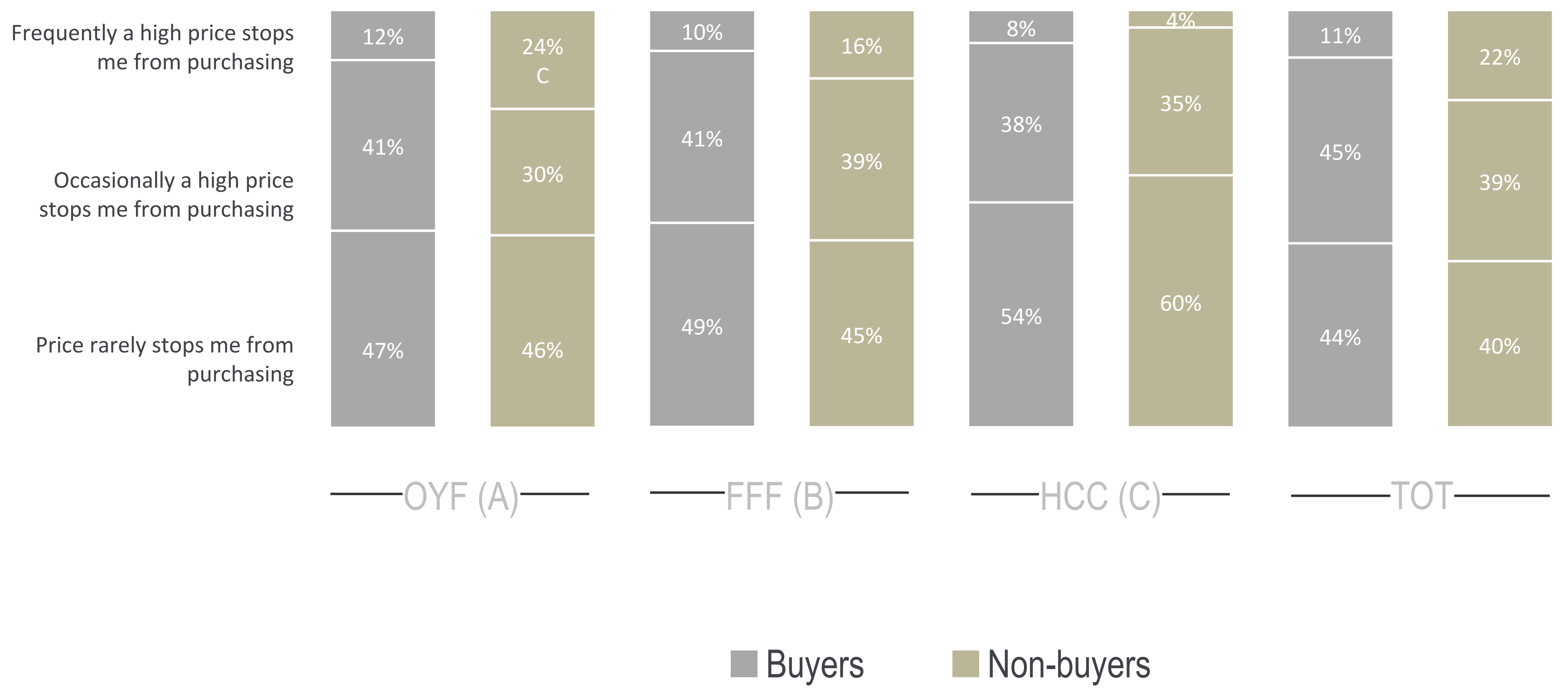
- The value of blueberries appears to be holding vs. prior wave
  - About ½ of respondents report that occasionally a high price stops them from purchasing while only 12% report that it happens frequently
- Surprisingly, HCC, a less price insensitive segment, had a significant increase in saying "occasionally a high price stops me from purchasing"
- The effect of the relatively higher price of blueberries vs. other fruits can be seen when we ask this question regarding the respondents' favorite non-blueberry fruit (slide #41)
  - 45% reported that occasionally a high price stops them from purchasing while only 11% report that it happens frequently

Q26. Thinking about the value of blueberries to you/your family, which statement best describes how you feel about their value? (SELECT ONE)

(p<0.05)

Favorite (non-blueberry) Fruit Value

Impact of Price on Purchase Decision



BUYERS

- Blueberry buyers report a bit less price sensitivity with their favorite non-blueberry fruit
  - 56% reporting that price frequently or occasionally stops them from purchase vs. 62% for blueberries

NON-BUYERS

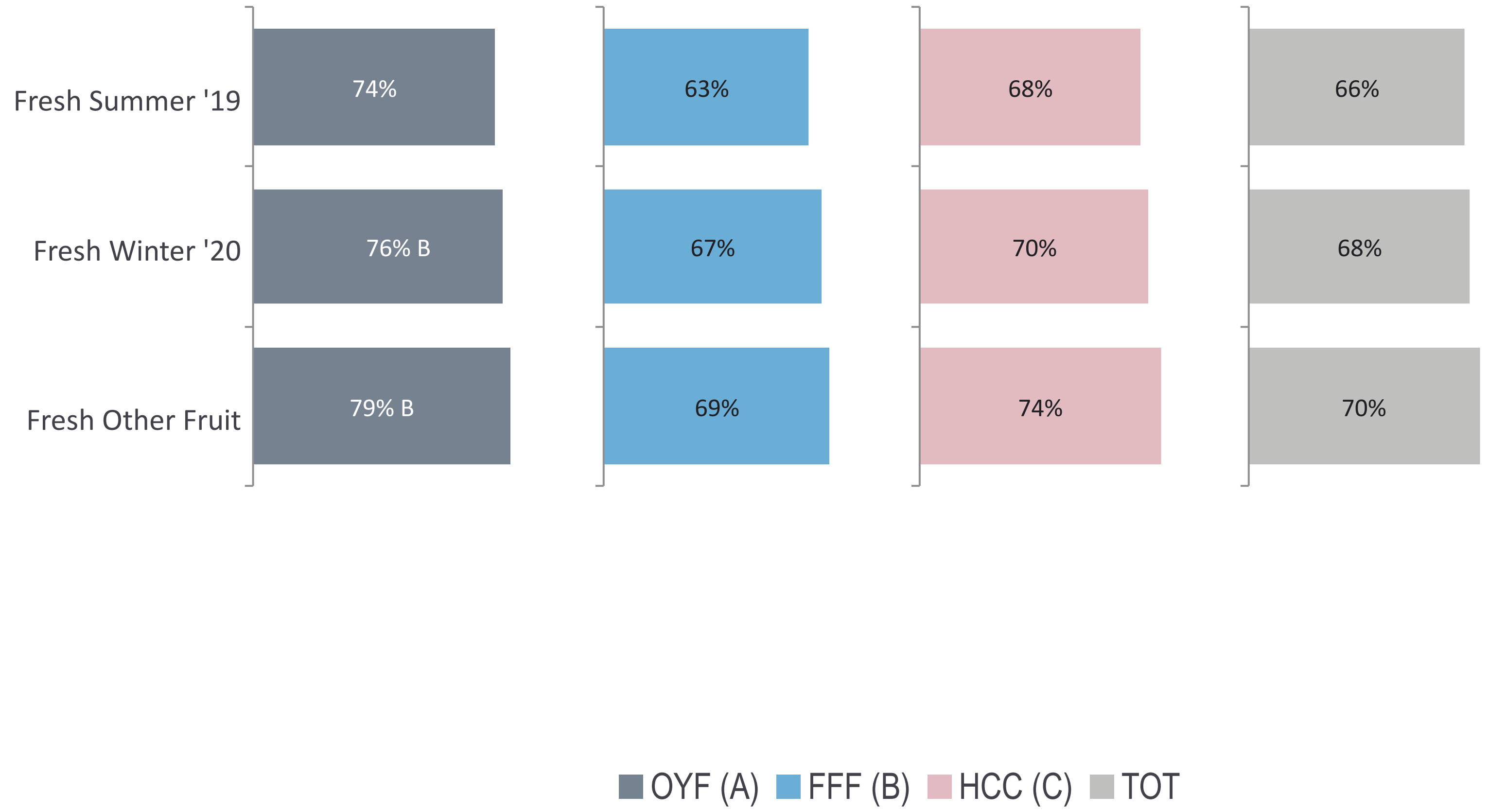
- Non-blueberry buyers exhibit greater price sensitivity as 22% report that price frequently stops them from purchasing their favorite fruit

Q26a. Thinking about the value of your favorite fruit (other than blueberries, which statement best describes how you feel about their value? (SELECT ONE)

($p<0.05$)

Do Blueberries/Fruit Meet Expectations?

T3B Meets or Exceeds Expectations (Fresh Only)



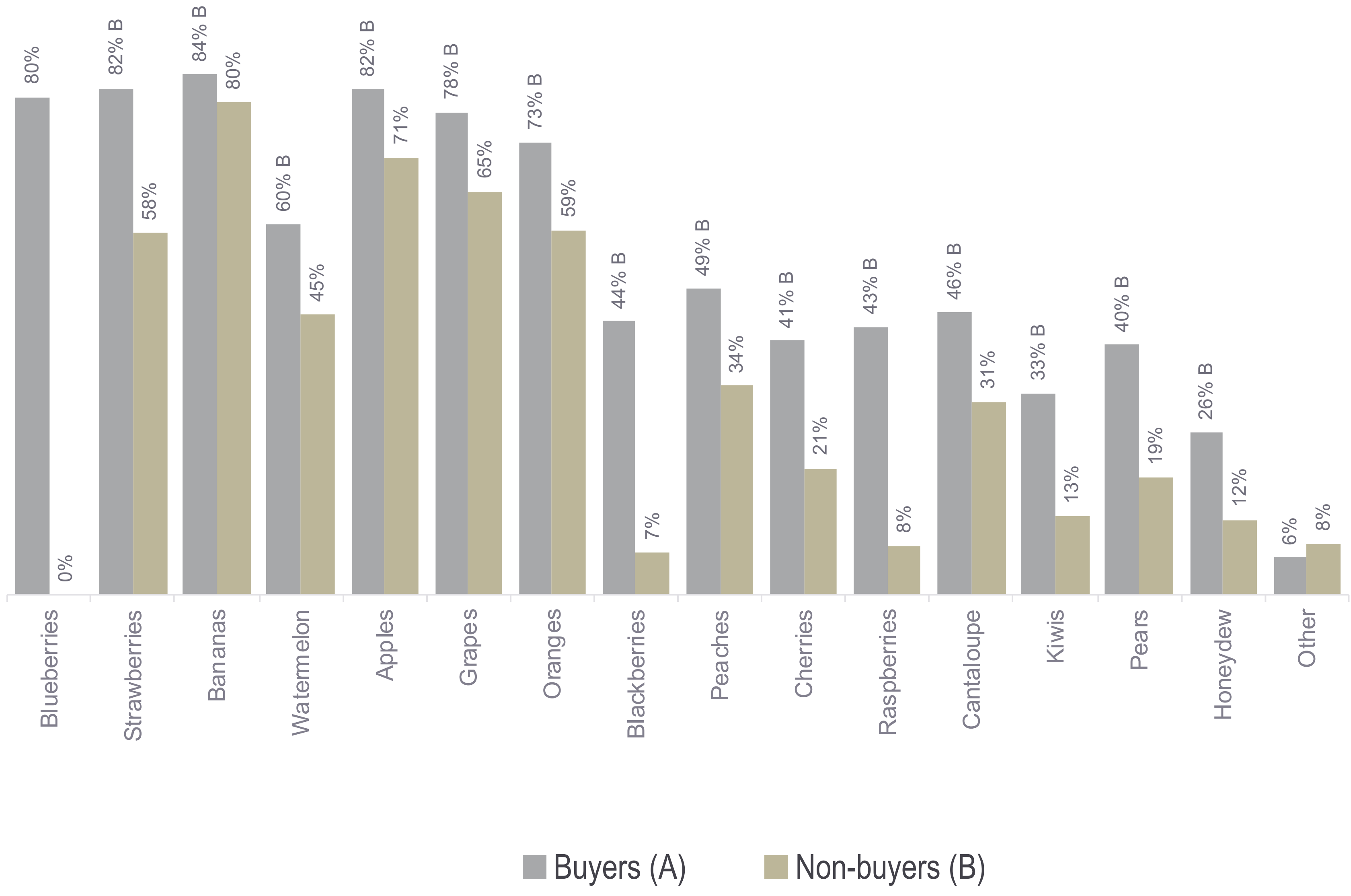
- Blueberries as well as other fruit meet respondents' expectations approximately 70% of the time
- Responses were consistent across segments and for blueberries as well as other fruit
- There is no indication of greater quality issues with blueberries than other fruit

Q19 & 19a. On a scale of 0 to 10, where 10 means "ALWAYS meets/exceeds my expectations" and 0 means "NEVER meets/exceeds my expectations", please rate each form listed below on how often the blueberries you purchase meet or exceed your expectations.

(p<0.05)

Fresh Fruit

% Purchased Past 12 Months



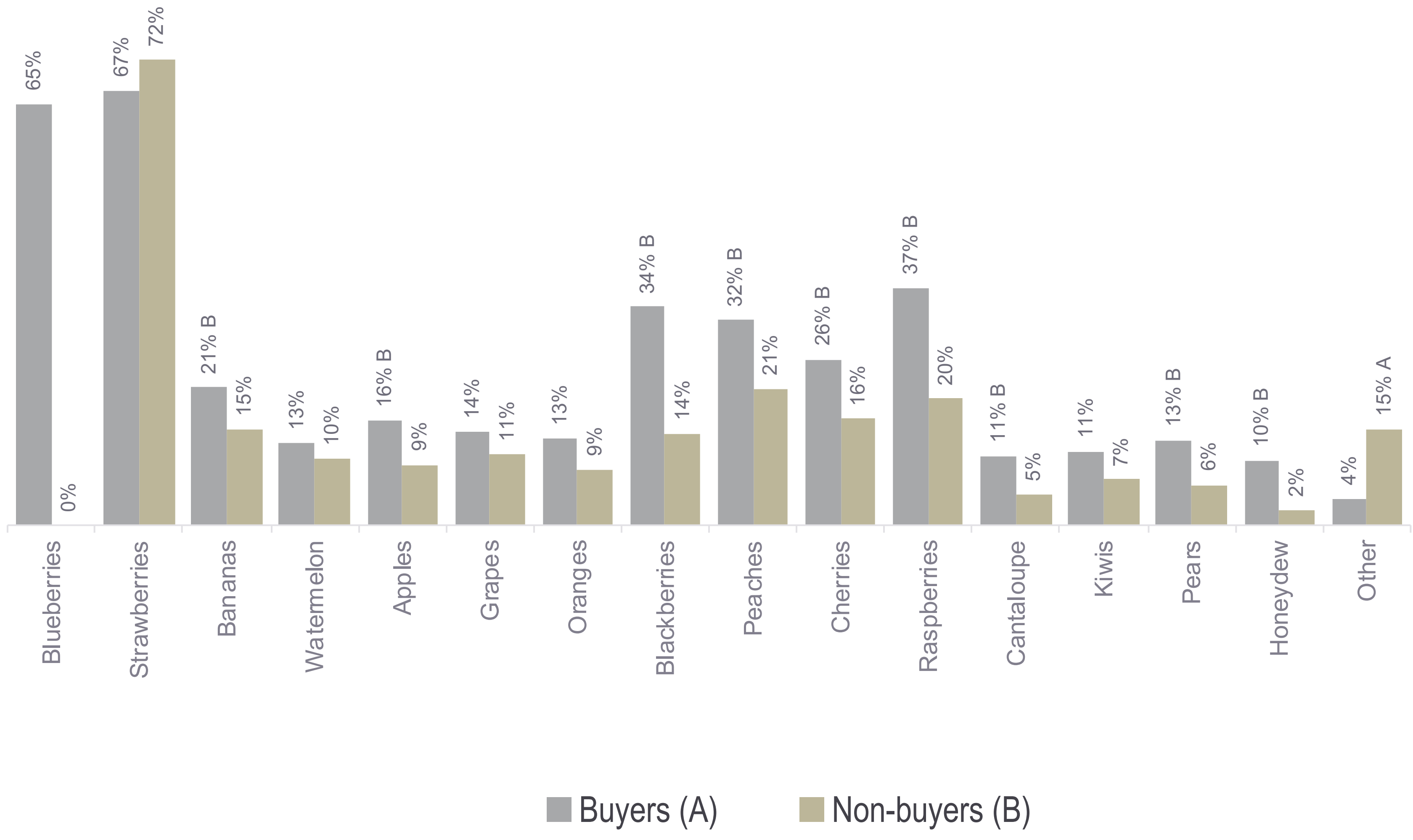
- Blueberries, Strawberries, Bananas, Apples and Grapes are the top five fruits purchased by blueberry buyers
- In general, blueberry buyers are buying more of all types of fruit than blueberry non-buyers
- For non-blueberry buyers, the top five fruits purchased are relatively consistent: Bananas, Apples, Grapes, Oranges and Strawberries
  - It is worth noting that if a respondent did not buy blueberries, they did not buy other berries either with the notable exception of Strawberries

Q5. Which of the following fresh fruit have you purchased in the past 12 months?

($p<0.05$)

Frozen Fruit

% Purchased Past 12 Months



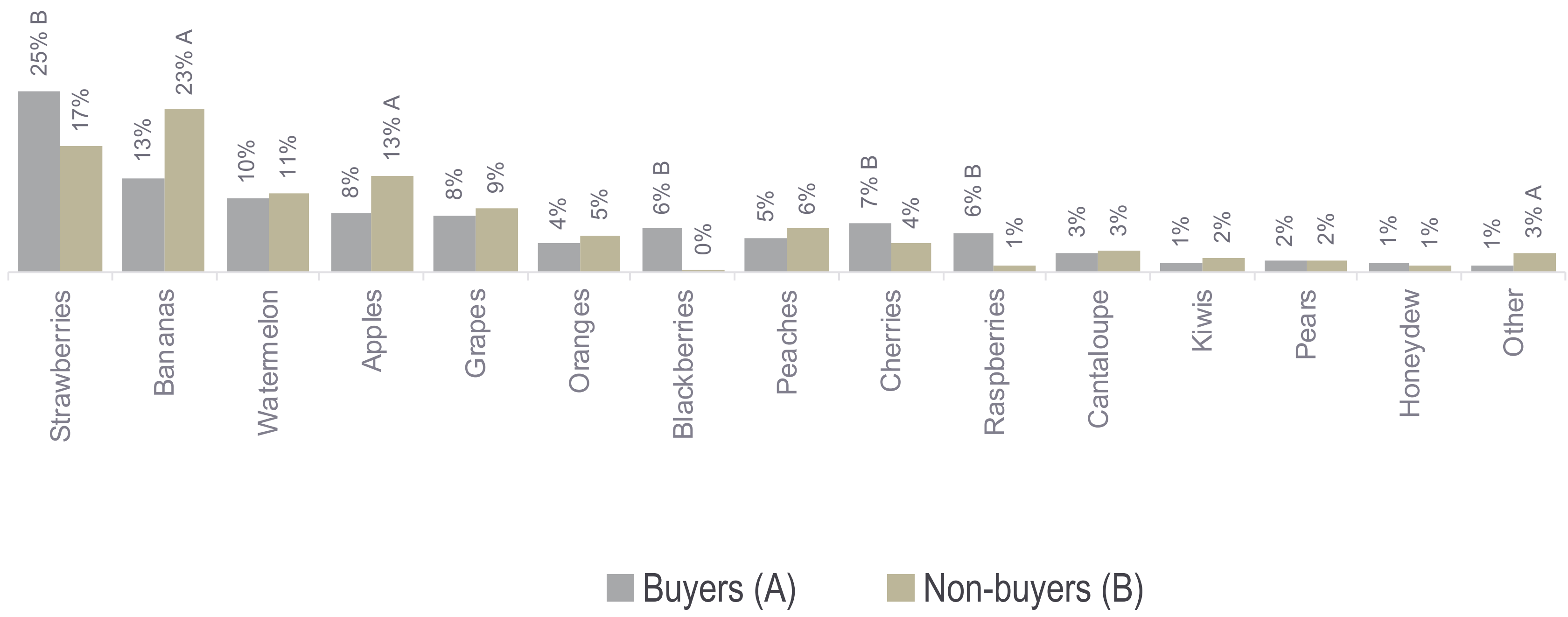
- Over 60% of respondents who purchase Fresh blueberries also purchase Frozen blueberries as well as Frozen strawberries
  - The purchasing level for all other Frozen fruit drops off substantially
  - If a respondent purchases frozen blueberries, he/she seems to also have greater interest in purchasing other frozen berries including blackberries and raspberries
- For non-blueberry buyers, frozen strawberries are by far the most frequently purchased frozen fruit with all other fruit falling to below 20% purchase rates.
  - A greater percentage report buying frozen strawberries (72%) vs fresh strawberries (58%)

Q5a. Which of the following frozen fruit have you purchased in the past 12 months?

(p<0.05)

Favorite Non-blueberry Fruit

Buyers vs Nonbuyers



- For blueberry buyers, their next most favorite fruit is strawberries by a large margin
- Non-blueberry buyers strongly prefer bananas, followed by strawberries

Q13a. Please select which fruit is your most favorite (blueberries have been purposefully excluded)

(p<0.05)