



USHBC CONSUMER RESEARCH HIGHLIGHTS

HOW WE DID THE RESEARCH

- Quantitative research, May 2013
- Hybrid survey including online, mobile, and over the telephone
- 3,765 households nationwide
 - 1,797 “general population” respondents: primary shoppers 18+
 - 1,968 “oversample” respondents: women 25 – 44, primary shoppers

WHAT WE FOUND

TRENDING YOUNGER

2008 TYPICAL BLUEBERRY CONSUMER

- Upscale, well-educated, white
- Primarily 46-65 age group

2013 TYPICAL BLUEBERRY CONSUMER

- Upscale, well-educated and white
- More likely than 4 years ago to be from a minority group
- Trending younger
 - Over the last 9 years, blueberry consumers have grown more likely to be in the 35-44 age group
- Likely to purchase blueberries based solely on health benefits

WHAT WE FOUND

MORE LIKELY TO BUY BLUEBERRIES

2013 The average consumer is more likely to buy blueberries in the next year than the average consumer was in 2004 or 2008

Year	2004	2008	2013
Average Rating (likelihood to purchase blueberries in next year)	4.41	5.7	8.33
p Value: 0.000		Eta ² : 0.018	

WHAT WE FOUND ALSO LIKELY TO BUY MORE OFTEN

2013 The average blueberry purchaser is likely to buy blueberries **MORE OFTEN** than she was in 2004 or 2008.

When was the last time you purchased blueberries?

Last time purchased	2004	2008	2013
Last week	27.5%	19%	26.4%
Last 15 days	10.5%	8.7%	21.3%
Last month	15.4%	10.4%	20.8%
A few months ago	30.2%	17.6%	16.9%
p Value: 0.000		Cramer's V: 0.278	

More than two thirds of households (68.5%) had purchased blueberries within a month of this survey, a substantial increase over the 2008 study (38.1%) and 2004 study (53.4%).

WHAT WE FOUND

FEWER CONSUMERS DISLIKE TASTE?

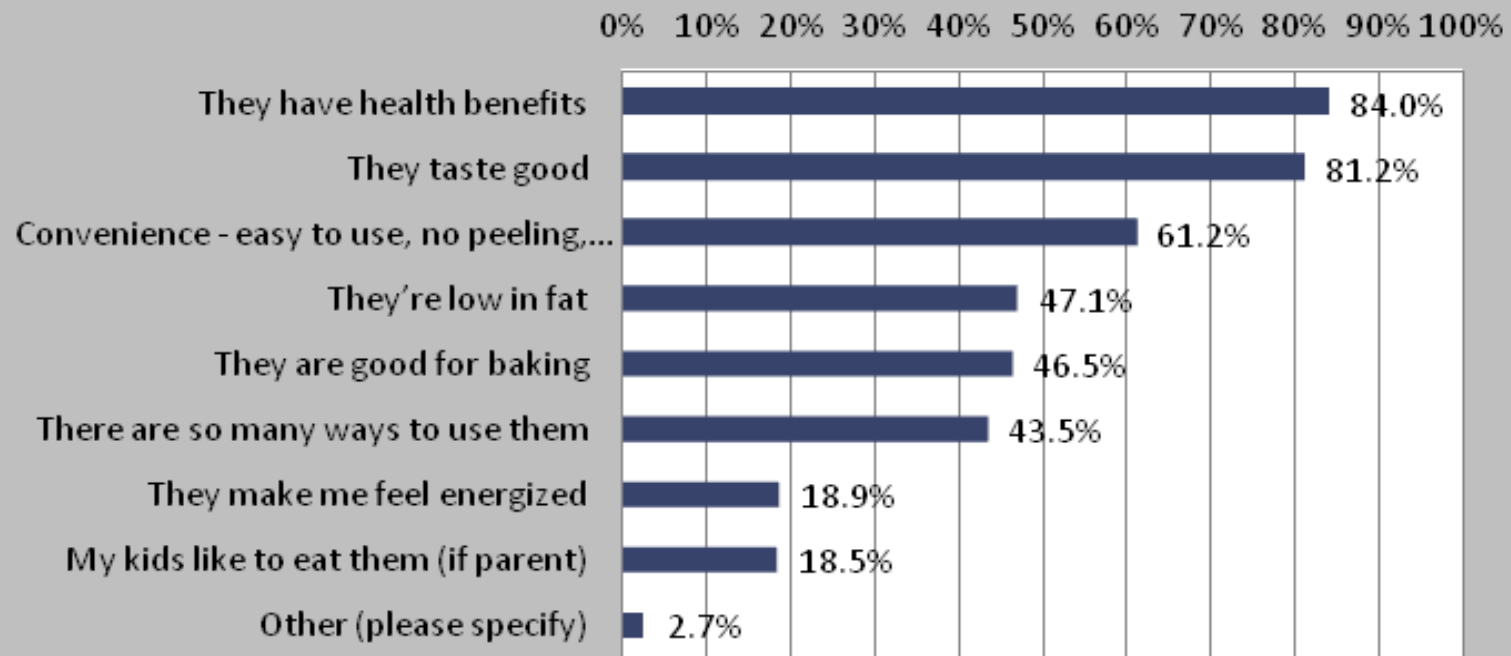
The percentage of consumers saying they haven't purchased blueberries because they don't like their taste has continued to fall since 2008.

Why haven't you purchased blueberries in the past 12 months?

Reason	2004	2008	2013
Don't like the way they taste	42.9%	33.0%	24.6%

WHAT WE FOUND CONSUMERS ♥ THE WHOLE PACKAGE

What do You Like About Blueberries?

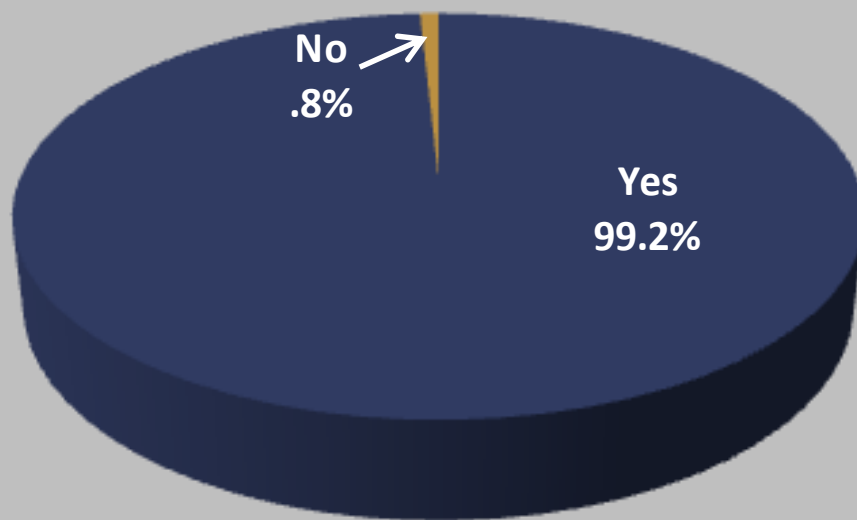


Health, taste and convenience were top reasons for enjoying blueberries, a change from previous studies, when taste was rated as more important than health.

WHAT WE FOUND HEALTHY? OF COURSE!

The overwhelming majority of both the general population and women 25-44 believe blueberries are healthy.

Belief that Blueberries are Healthy (General Population)



WHAT WE FOUND

HEALTH AWARENESS GROWS

Awareness of health benefits has increased substantially over time.

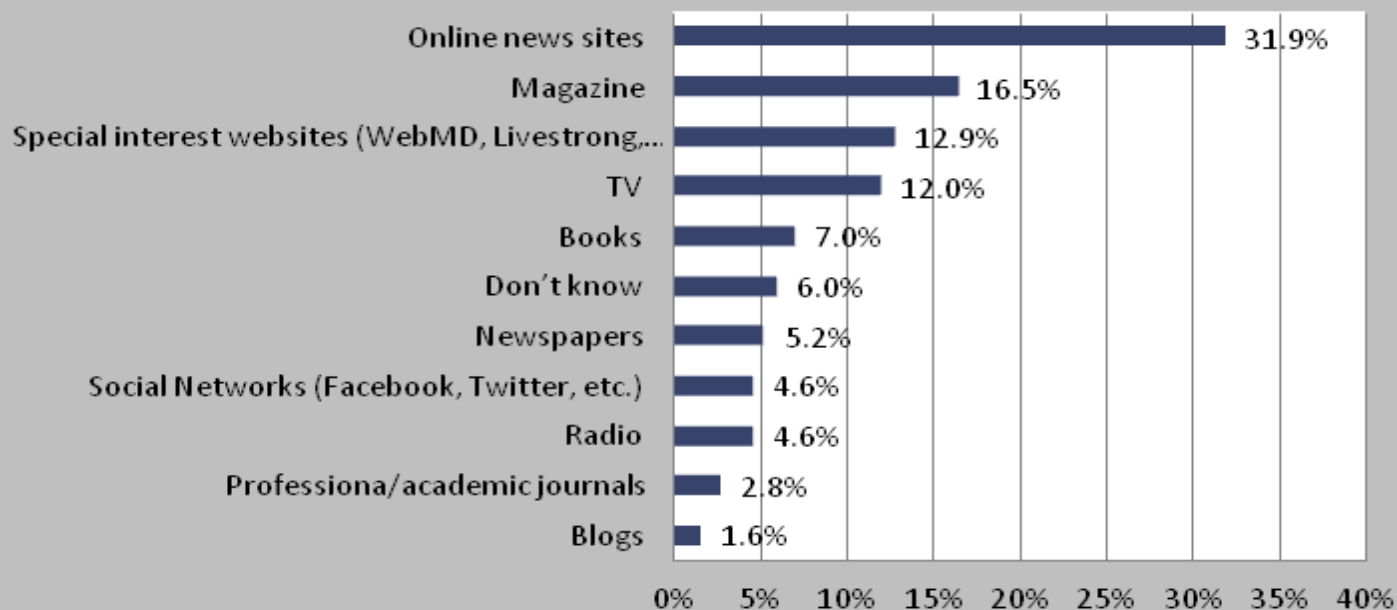
Are you aware of any specific health benefits of blueberries?

Aware of health benefits	2004	2008	2013
Yes	39.1%	62.2%	68%
No	57.5%	34.1%	15.9%
p Value: 0.000		Cramer's V: 0.290	

WHAT WE FOUND

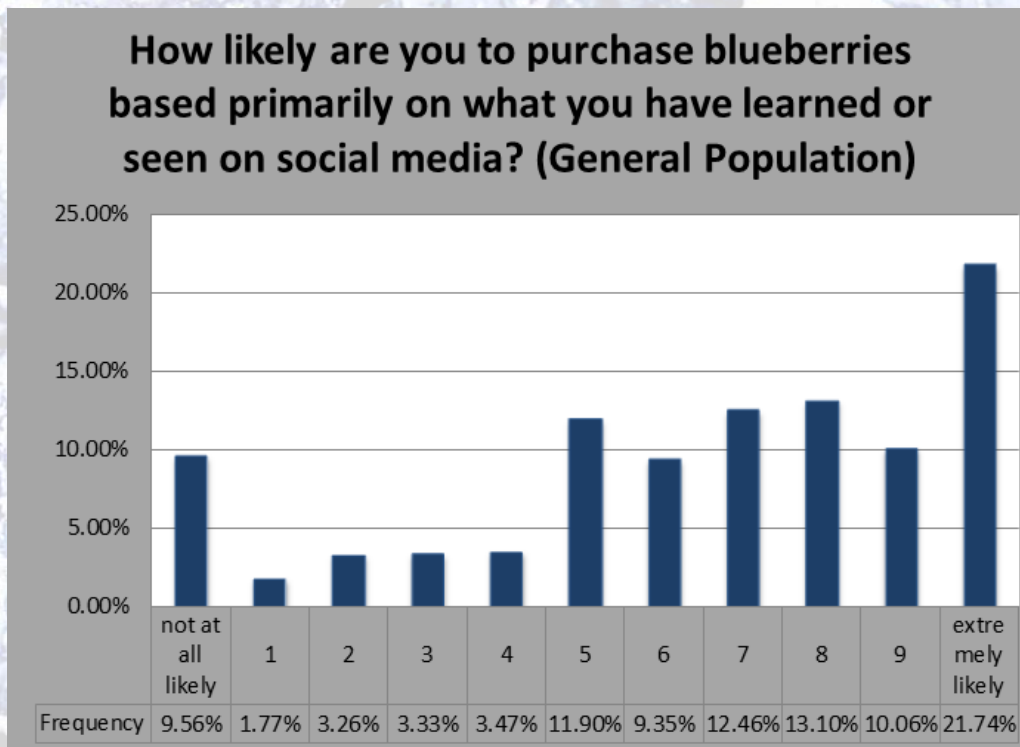
THE WEB: A TOP NEWS SOURCE

Where News Stories on Health Information About Blueberries was Heard (General Population)



WHAT WE FOUND

SOCIAL MEDIA DRIVES PURCHASES



Respondents were very likely to purchase blueberries based on the information they see and learn on their preferred social media sources. 57.36% of respondents gave a likelihood of 7 or higher.

WHAT WE FOUND

GOOGLE = #1 STOP

Websites Used For Nutritional Information		
General Population		
Site	With Search Engines	Without Search Engines
Google	41.23%	
WebMD	6.06%	11.73%
Yahoo	3.42%	
Food Network	2.87%	5.54%
Livestrong	2.65%	5.12%
Individual Product's Website	2.54%	4.90%
nutritiondata.com	2.43%	4.69%
Wikipedia	2.43%	4.69%
nutrition.gov	2.09%	4.05%
Bing	1.98%	

Women 25-44		
Site	With Search Engines	Without Search Engines
Google	56.36%	
WebMD	7.19%	11.46%
Yahoo!	5.65%	
Food Network	4.24%	6.76%
Bing	3.75%	
Livestrong	3.20%	5.09%
Individual Product's Website	3.07%	4.90%
Wikipedia	2.58%	4.11%
nutrition.gov	2.40%	3.82%
myfitnesspal	2.15%	3.43%

WHAT WE FOUND

GOOGLE = #1 STOP

Top Recipe Websites

General Population

Rank	1st	2nd	3rd
Google	23.59%	11.00%	13.68%
allrecipes.com	14.83%	10.32%	0.85%
Food Network	12.74%	9.86%	9.40%
recipes.com	6.93%	4.86%	2.56%
Pinterest	6.98%	3.79%	2.56%
Yahoo!	2.13%	4.17%	0.85%
Betty Crocker	2.57%	3.03%	2.56%
Facebook	1.45%	3.26%	2.56%
food.com	1.55%	2.58%	7.69%
recipe.com	2.42%	1.06%	

Women 25-44

Rank	1st	2nd	3rd
Google	24.19%	11.15%	9.68%
allrecipes.com	12.90%	10.16%	5.47%
Food Network	11.29%	8.36%	7.58%
Recipes.com	5.85%	3.44%	4.63%
Pinterest	4.74%	2.79%	2.74%
Yahoo!	2.32%	3.77%	4.84%
Epicurious	2.92%	4.43%	2.32%
Facebook	1.31%	2.79%	2.11%
Food.com	1.41%	1.64%	3.37%
Bing	0.50%	2.62%	2.95%

WHAT WE FOUND

A FRESH (& FROZEN) FAVORITE

Rank fresh berries in order of preference:

Berry type 1 st rank	2004	2008	2013
Blueberries	15.5%	21.5%	36.6%
Strawberries	56.2%	47.7%	29.5%
Blackberries	9.0%	7.3%	17.6%
Boysenberries	1.0%	0.6%	7.5%
Raspberries	13.0%	17.6%	4.8%
Cranberries	2.3%	3.8%	2.1%
p Value: 0.000		Cramer's V: 0.267	

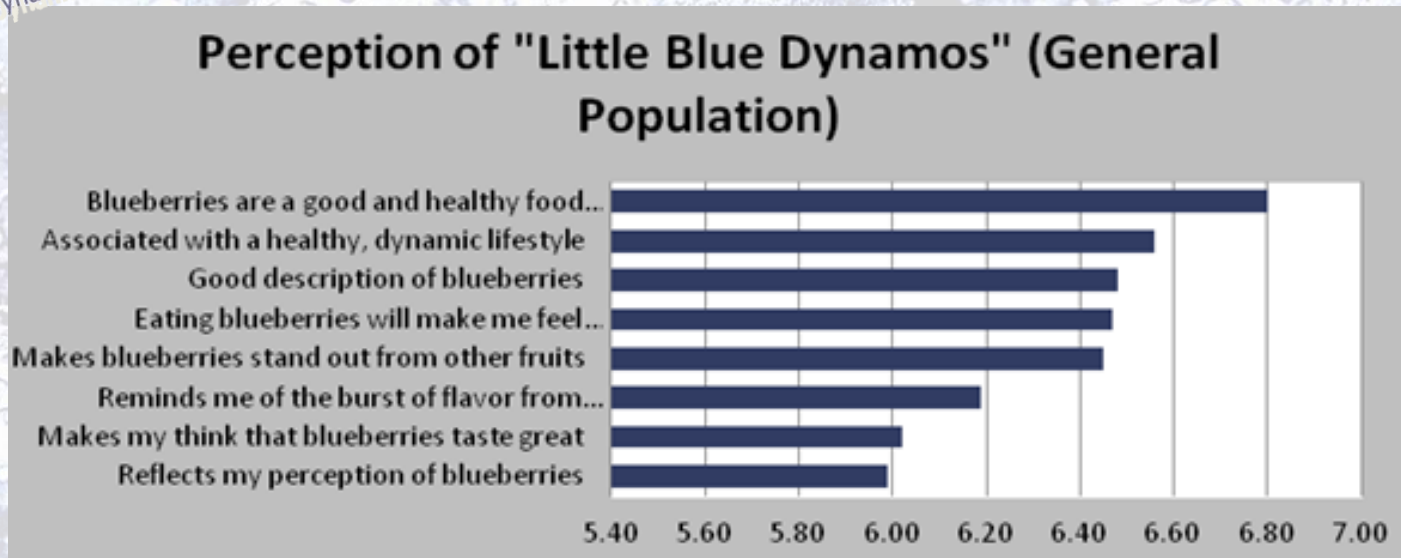
When frozen, the average rating for strawberries was slightly higher than for blueberries, although the percentage of people who rated blueberries first was higher.

WHAT WE FOUND



CONSUMER APPROVED!

Please give your opinion of little blue dynamos as a way to describe blueberries.



General population and women 25-44 agreed "Little Blue Dynamos" had value in describing blueberries and conveying their health/lifestyle benefits.

FOR MORE INFORMATION

For more information or to obtain a copy of the full report, contact

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