



CHERNOFF NEWMAN

COLUMBIA / CHARLESTON / ORLANDO / CHARLOTTE



POSTWAVE RESEARCH

FY 2017

METHODOLOGY



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METHODOLOGY

This report presents the findings of the May 2017 Fresh From Florida campaign tracking study. The study is conducted twice annually – prewave and postwave.

Campaign schedules and research dates are provided on the following page.

METHODOLOGY

ACTIVITY	DATES
2013 Prewave Study	March 12 – 20, 2013
2013 Postwave Study	June 3 – 10, 2013
2014 Prewave Study	January 3 – 7, 2014
2014 Postwave Study	March 17 – 27, 2014
2014 Prewave Study	December 8 – 21, 2014
2015 Postwave Study	May 8 – 19, 2015
2015 Prewave Study	December 9 – 28, 2015
2016 Postwave Study	May 9 – 25, 2016
2016 Prewave Study	December 8 - 23, 2016
2017 Postwave Study	May 8 - May 23, 2017

METHODOLOGY

As in the past, respondents meet the following criteria:

- Female
- Resident of Florida
- Age 25 to 54
- Household income of \$50,000 or more
- Responsible for or share grocery shopping responsibilities for household
- Purchase fresh produce and seafood

METHODOLOGY

- Sample size of 300 statewide
- Sampling error is +/- 5.6 percentage points at the 95% confidence level
- Data were collected using an online panel
- Figures in this report have been rounded. In some cases, totals might add to more than 100 due to rounding error

KEY FINDINGS



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KEY FINDINGS

The Fresh From Florida campaign continues to demonstrate success in increasing awareness and recognition of the brand

Since March of 2013, awareness of Fresh From Florida has increased from 40% to 75%

Awareness of the Fresh From Florida logos has grown from 53% to 72%

KEY FINDINGS

In addition to name and logo awareness, several other study measures demonstrate the effectiveness of the campaign.

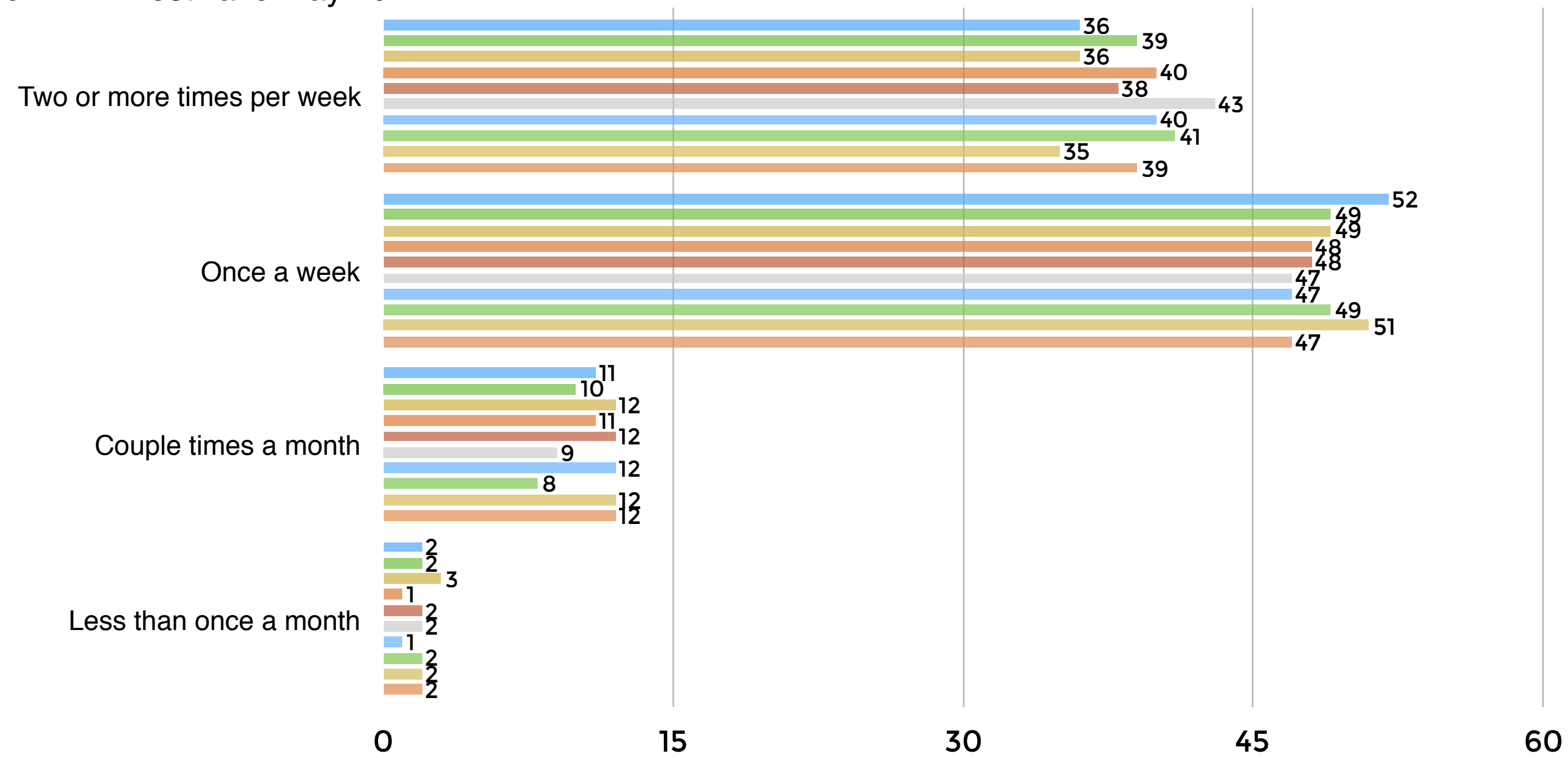
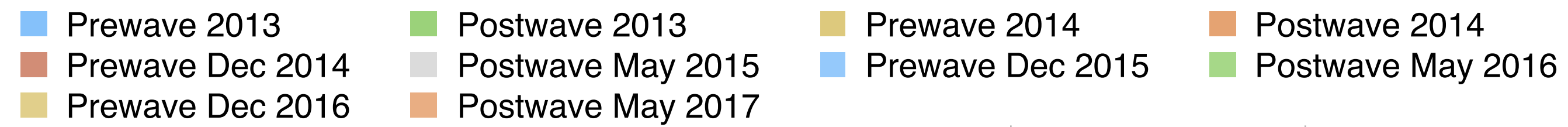
- Awareness of non-specific ads promoting Florida produce and seafood tends to shift with prewave and postwave studies.
- The proportion of consumers who feel it is *very* important to buy local produce tends to increase when the campaign is running.
- The proportion of customers who feel it *very* easy to find local produce also increases when the campaign is running.

PURCHASING BEHAVIOR



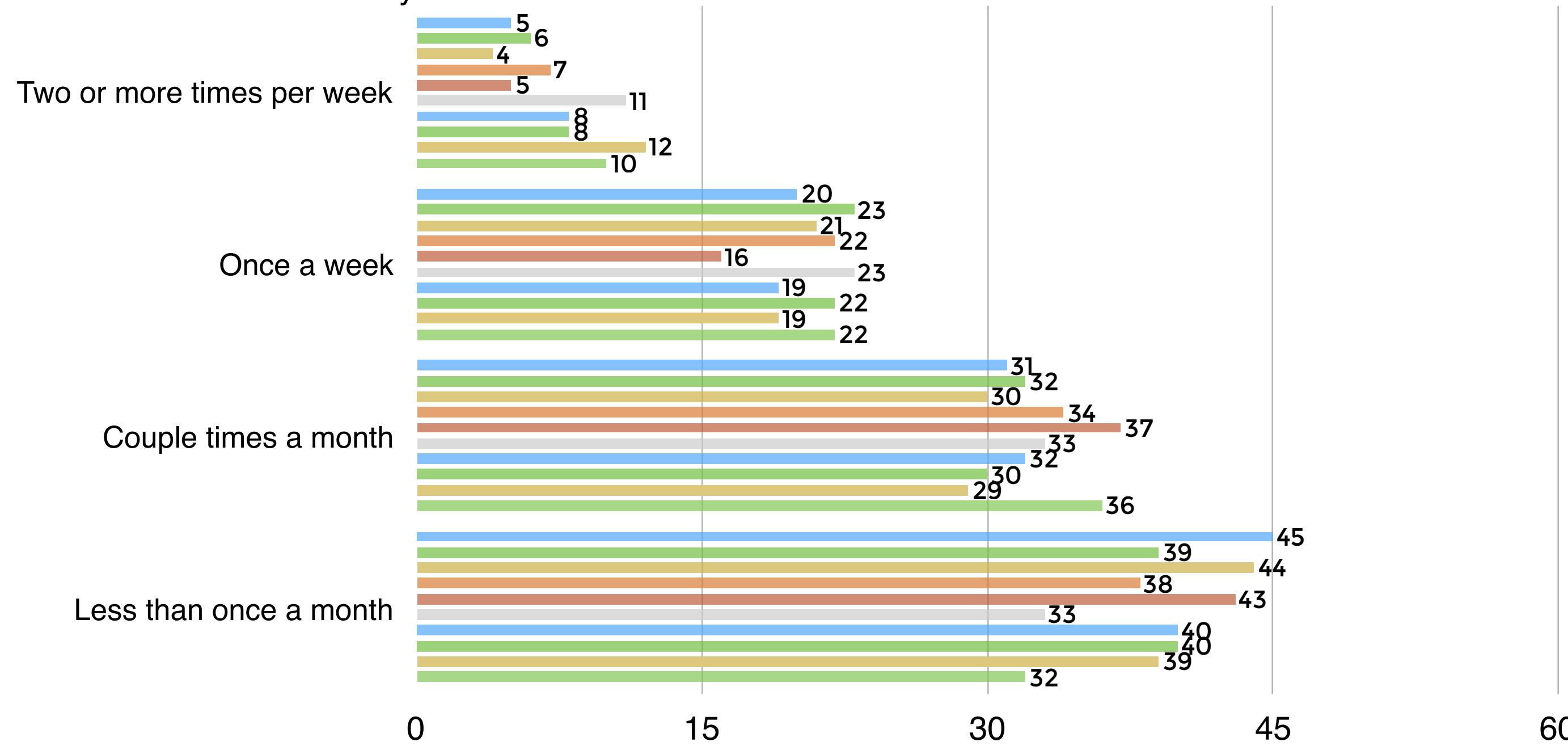
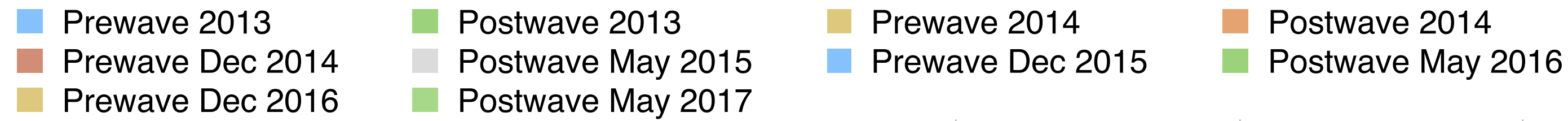
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FRESH PRODUCE PURCHASE FREQUENCY



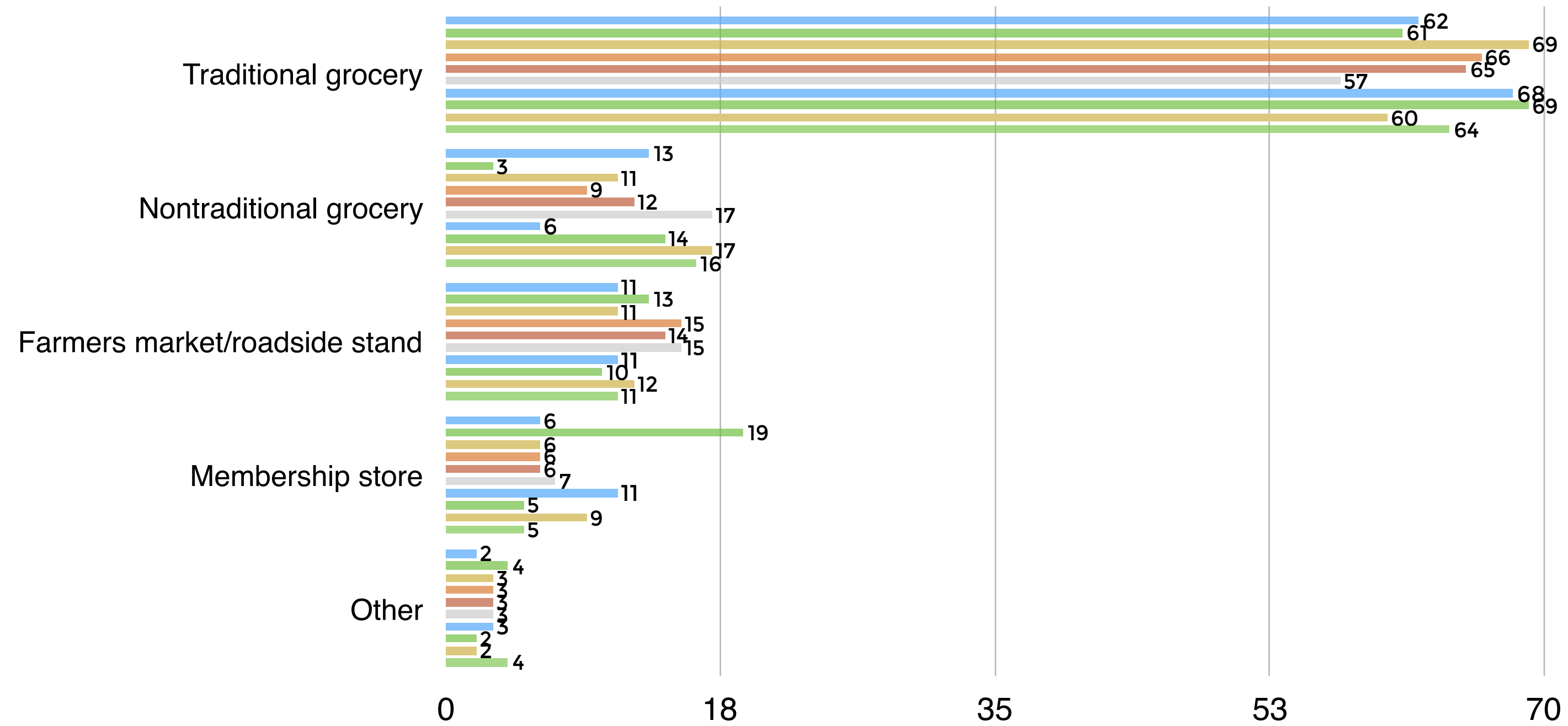
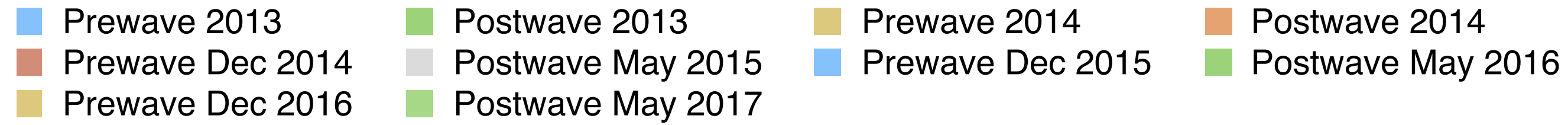
How often do you buy produce?

FRESH SEAFOOD PURCHASE FREQUENCY

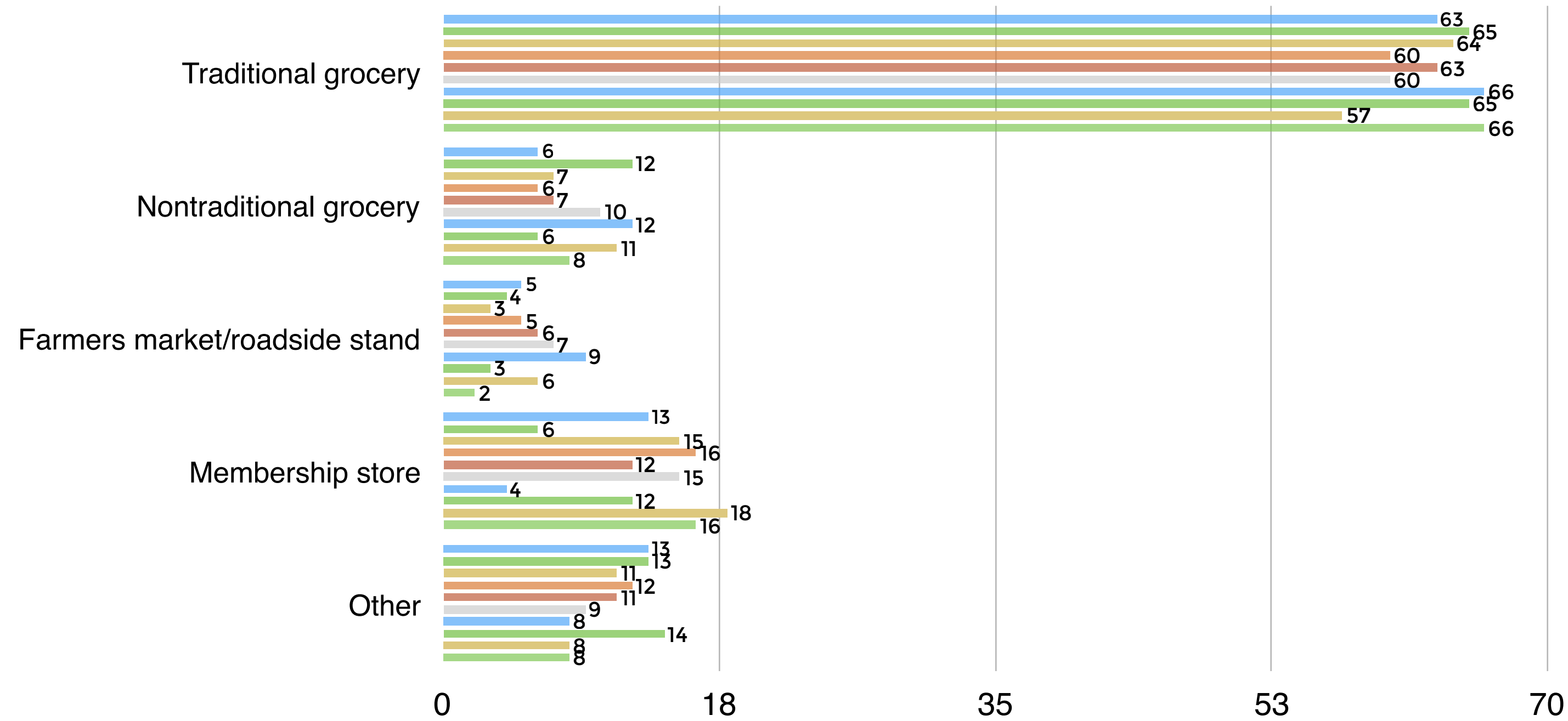
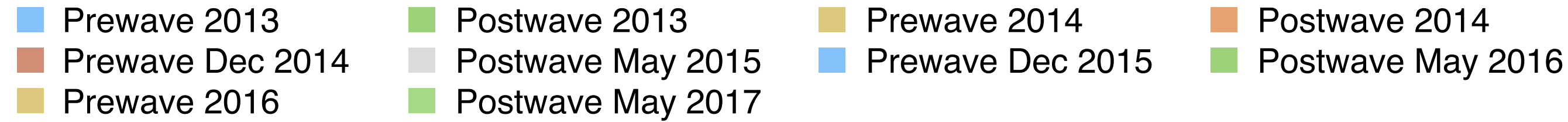


How often do you buy seafood?

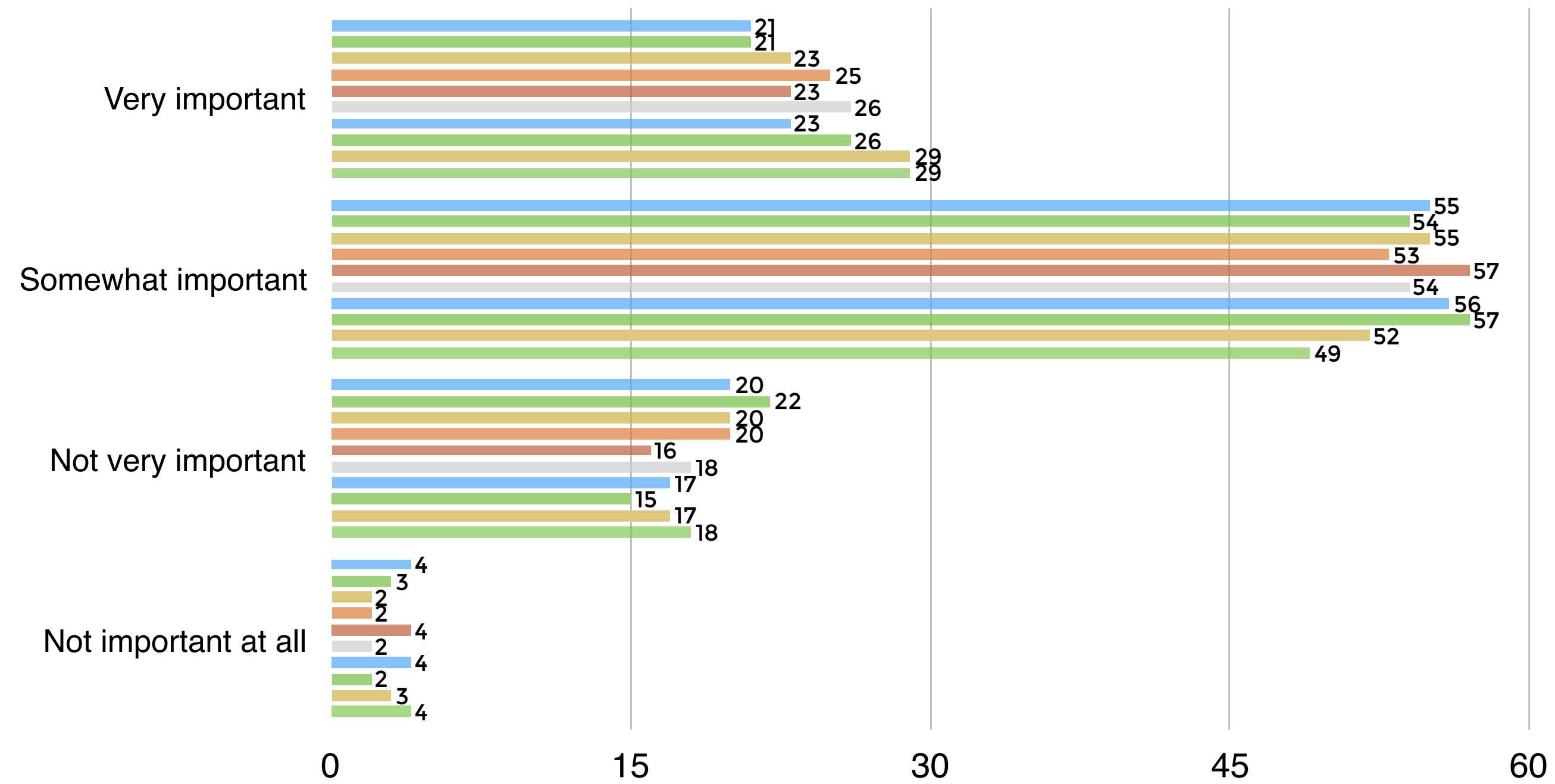
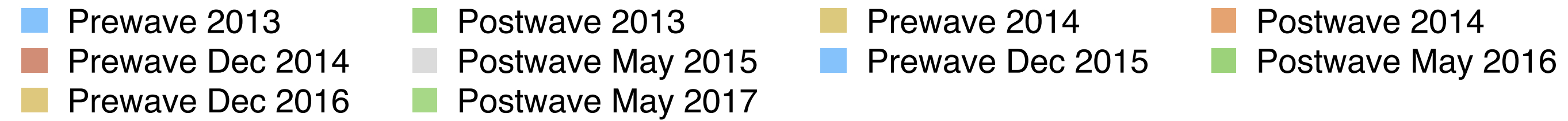
WHERE SHOP FOR PRODUCE



WHERE SHOP FOR SEAFOOD

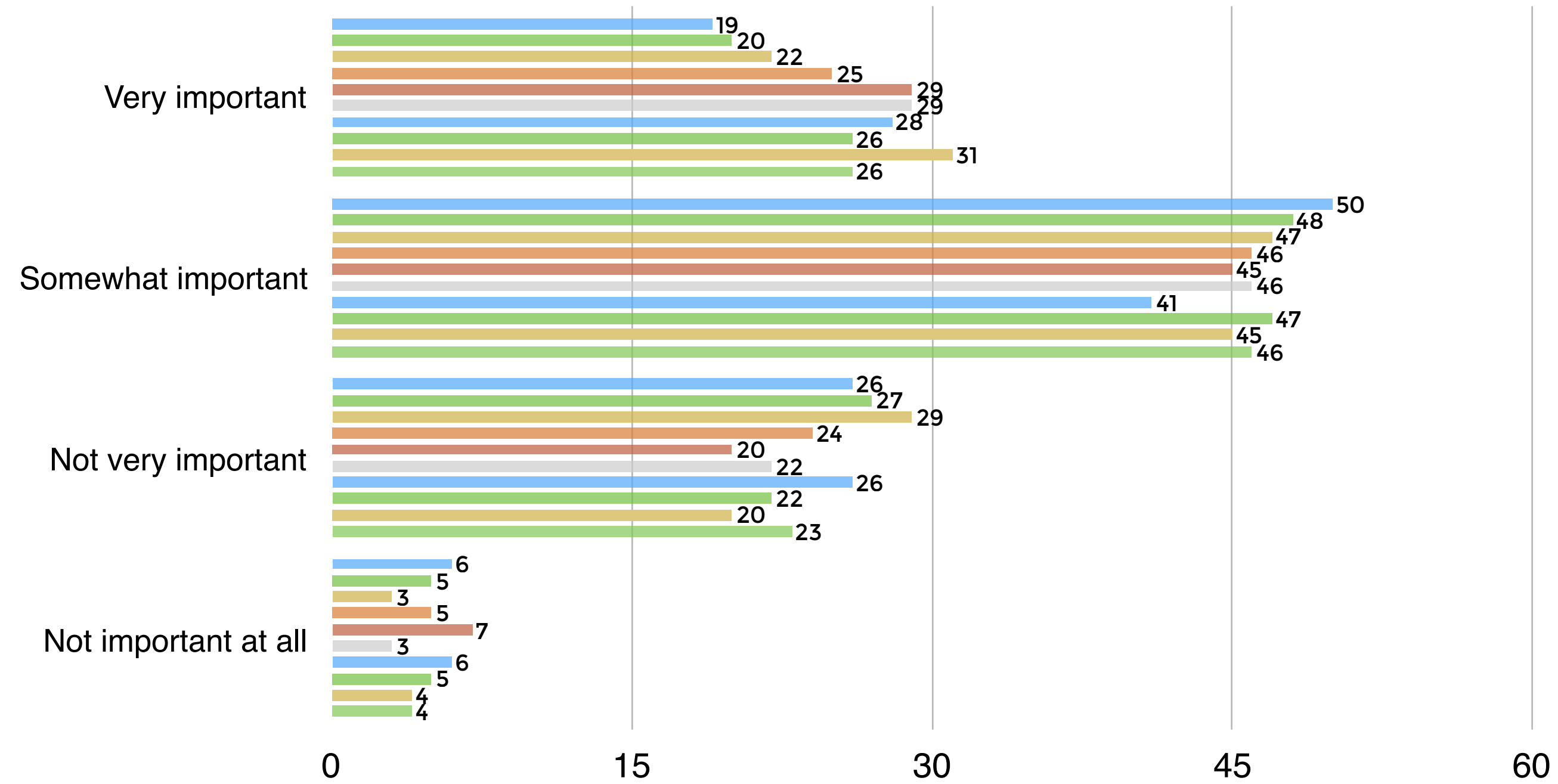
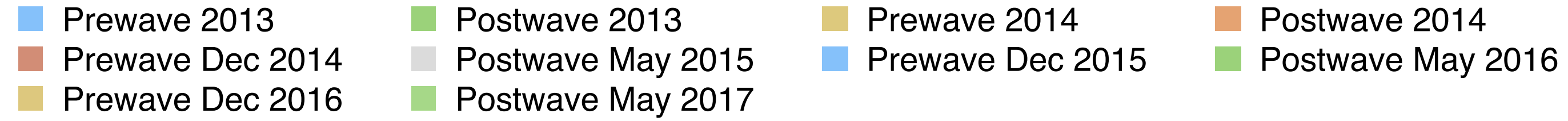


PURCHASING LOCAL PRODUCE



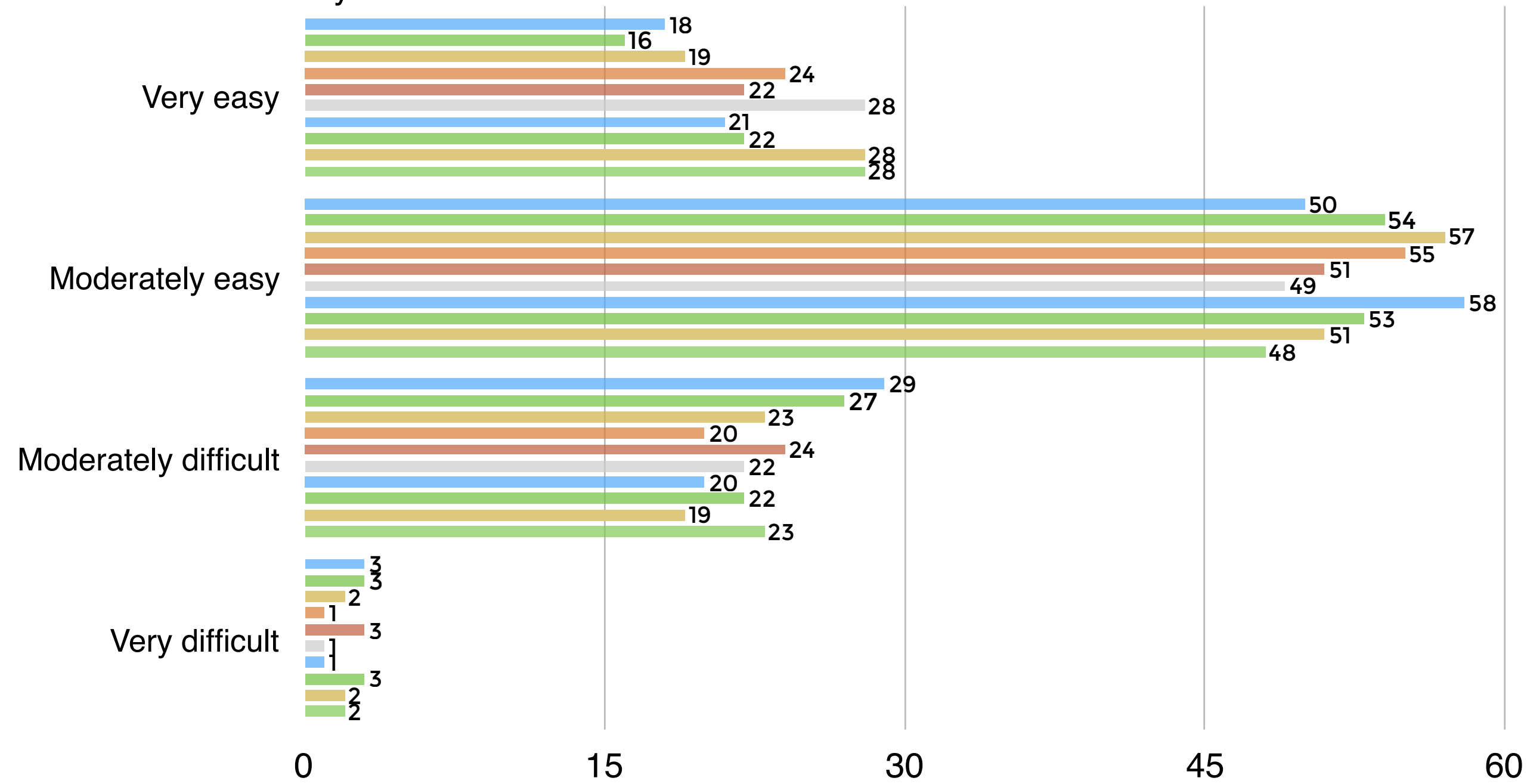
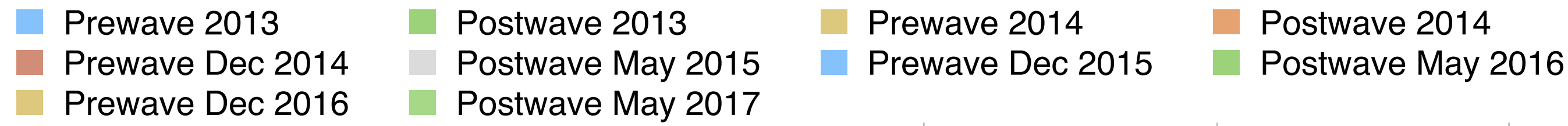
How important is it to you that the produce that you buy is locally grown?

PURCHASING LOCAL SEAFOOD



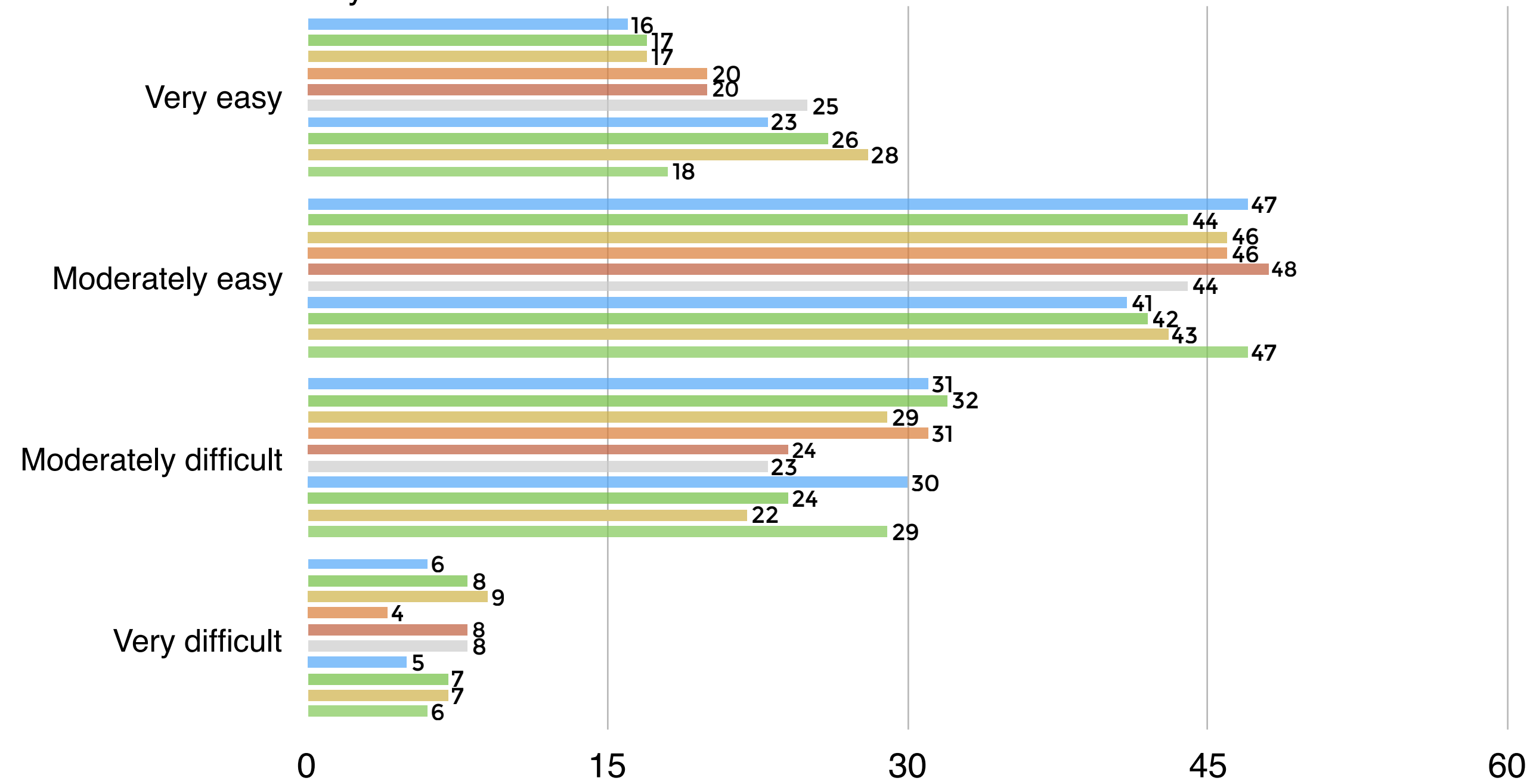
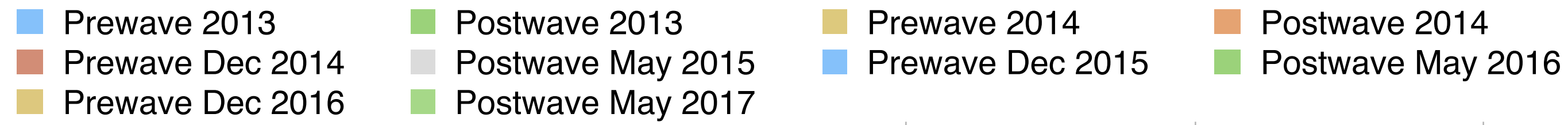
How important is it to you that the seafood that you buy is locally caught?

FINDING LOCAL PRODUCE



How easy is it to find locally grown produce where you shop?

FINDING LOCAL SEAFOOD



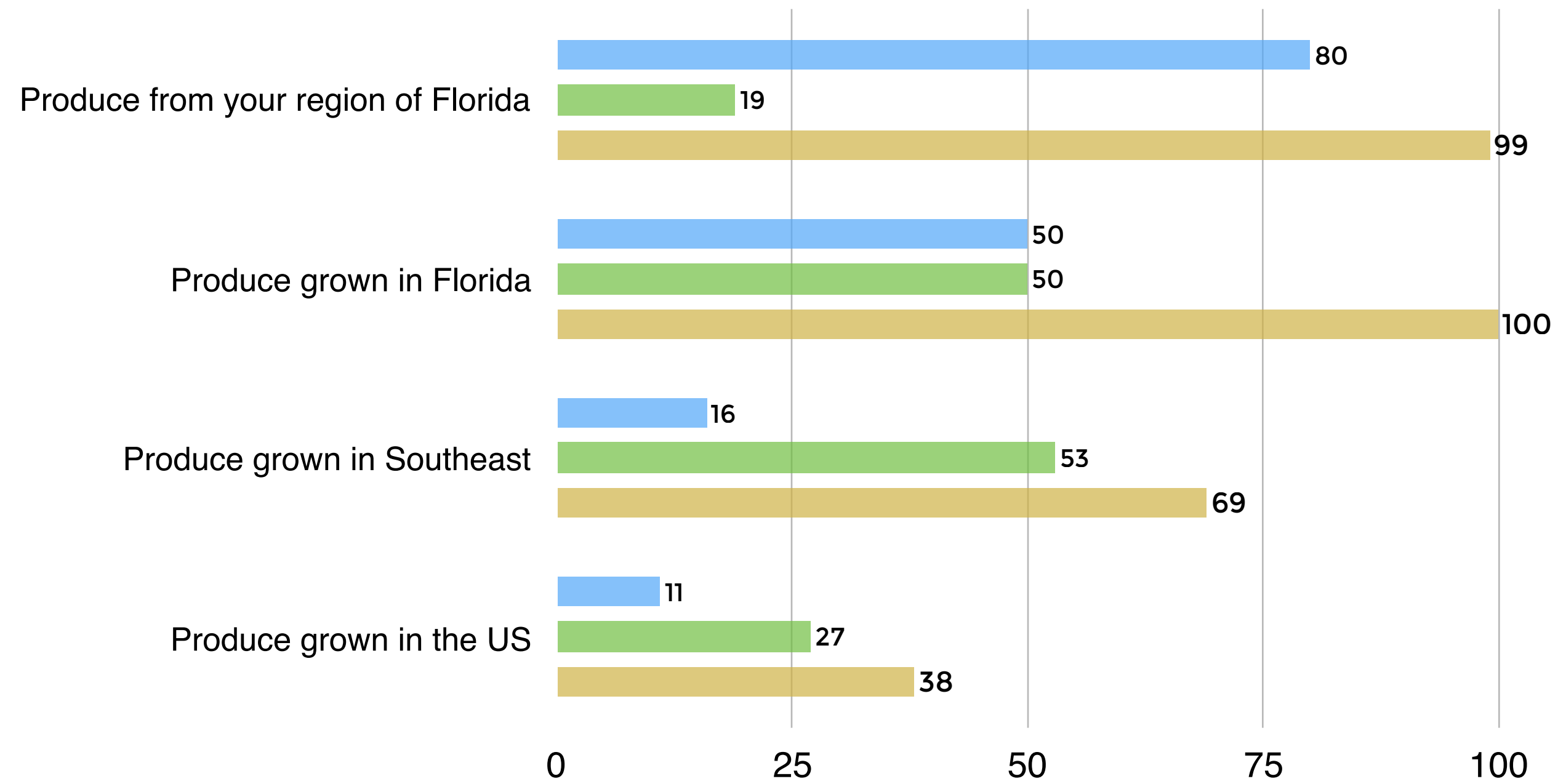
How easy is it to find locally caught seafood where you shop?

PURCHASING BEHAVIOR

We included several questions asking what consumers consider to be local, what motivates them to buy local, how fresh compares to frozen and how consumers shop for groceries.

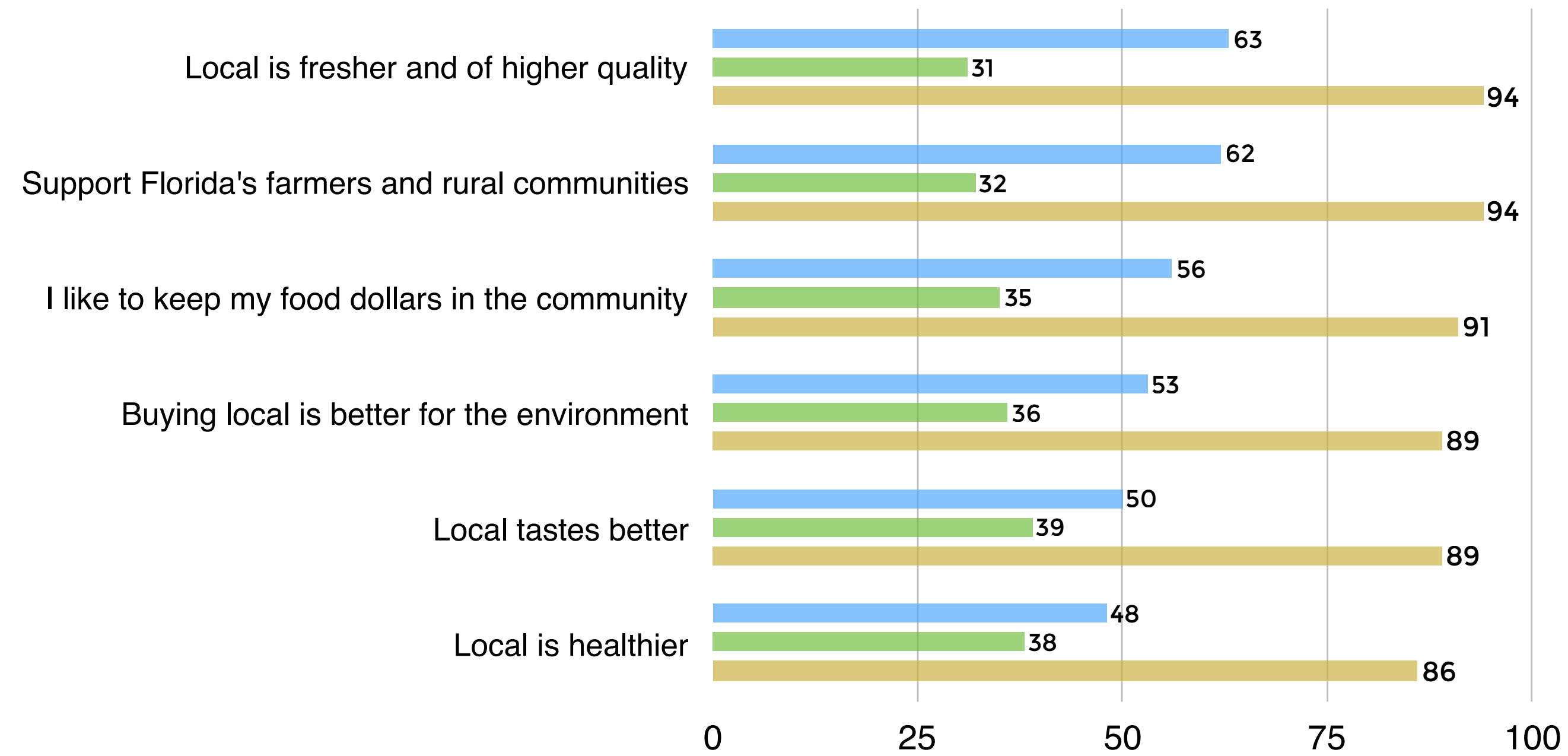
WHAT DO YOU CONSIDER LOCAL?

Definitely local Kind of local Total



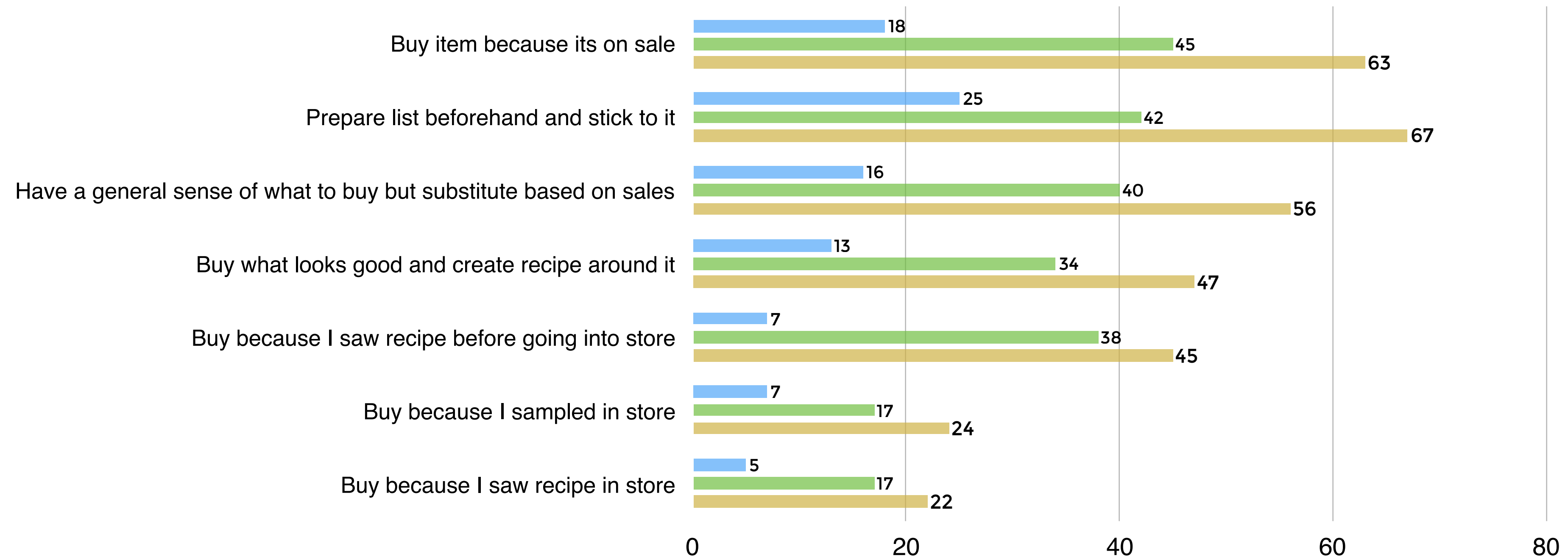
MOTIVATIONS FOR BUYING LOCAL

■ Very Strong Motivation
 ■ Somewhat Strong
 ■ Total



WHEN YOU BUY FRESH PRODUCE, HOW OFTEN DO YOU ...

Always Frequently Total



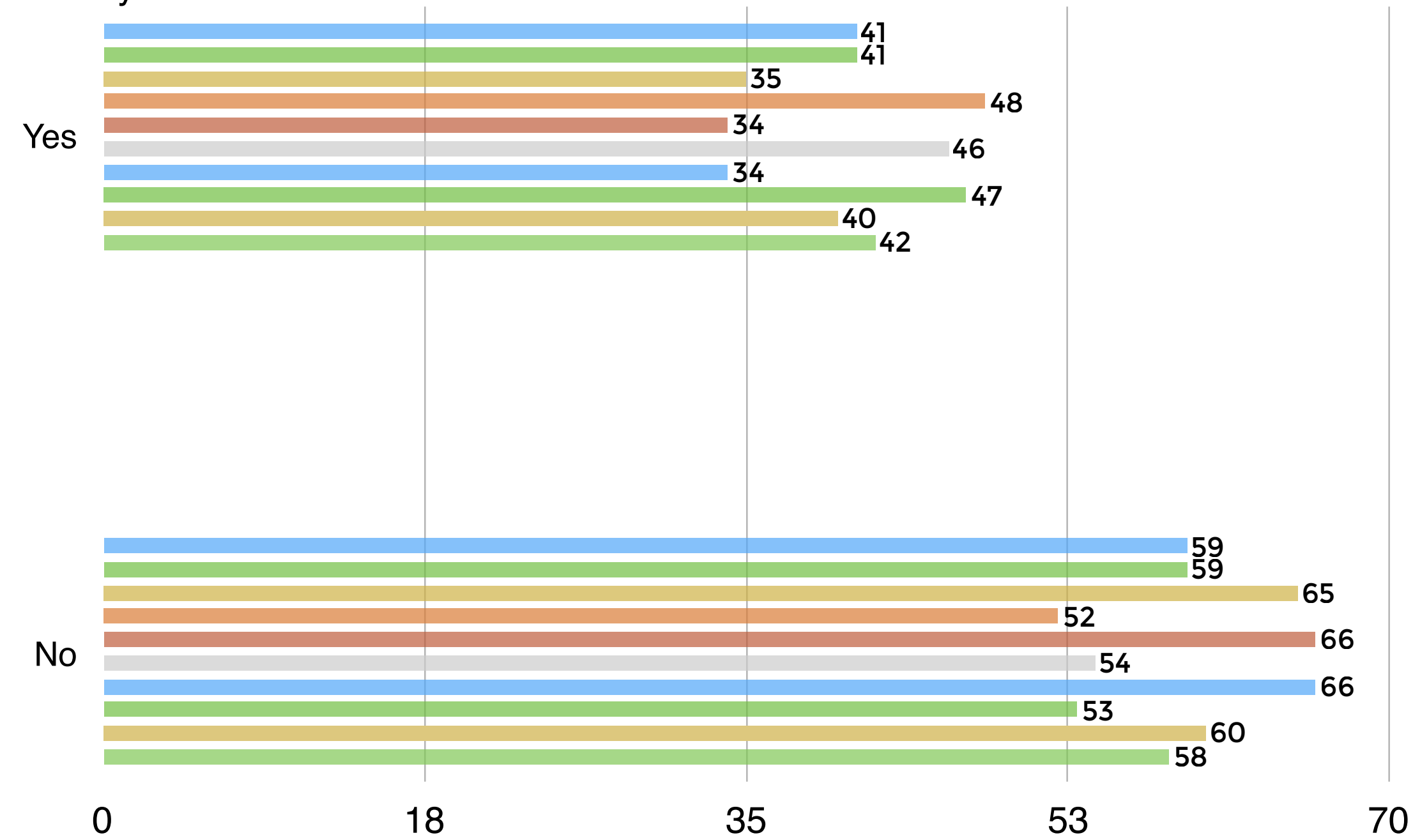
ADVERTISING AWARENESS



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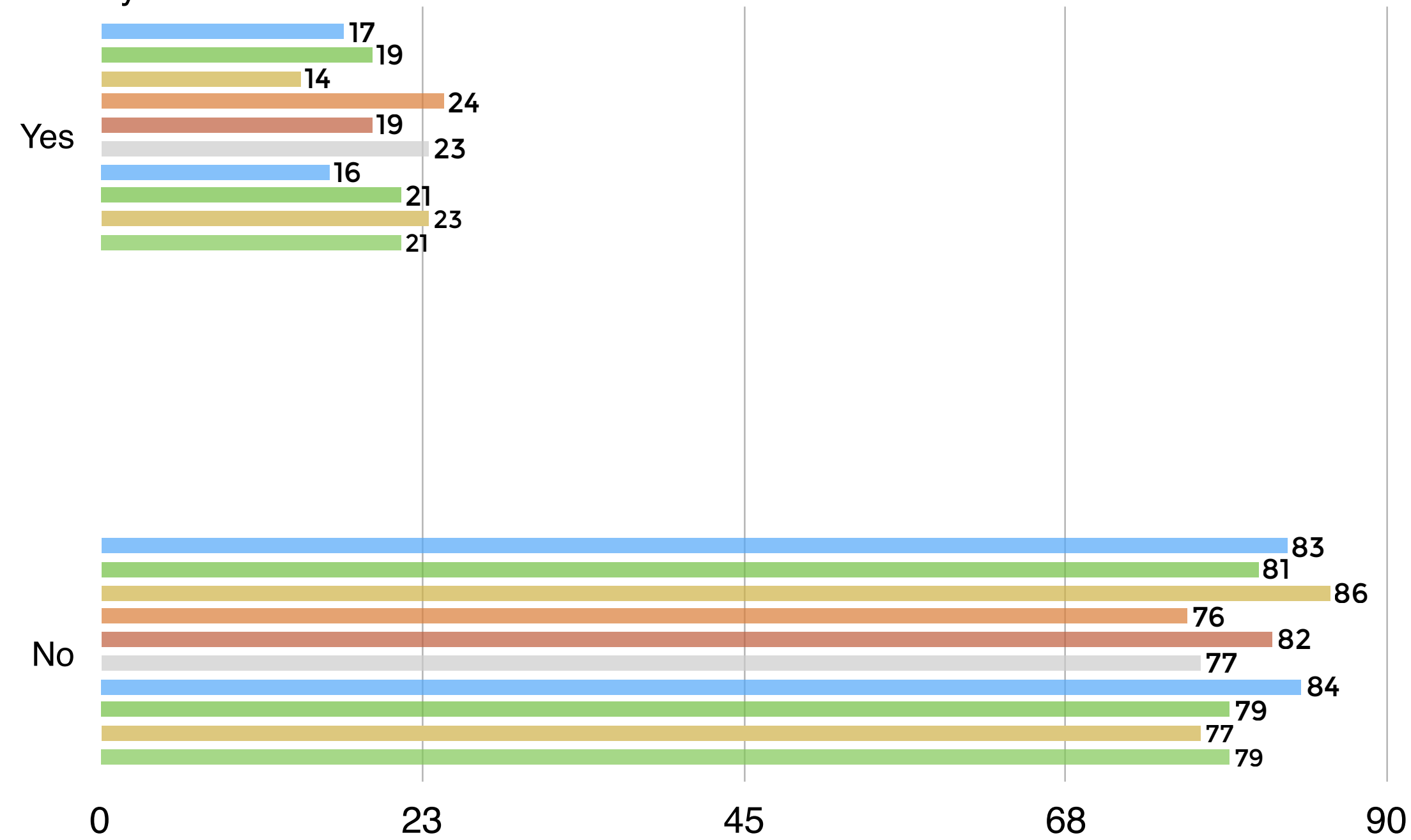
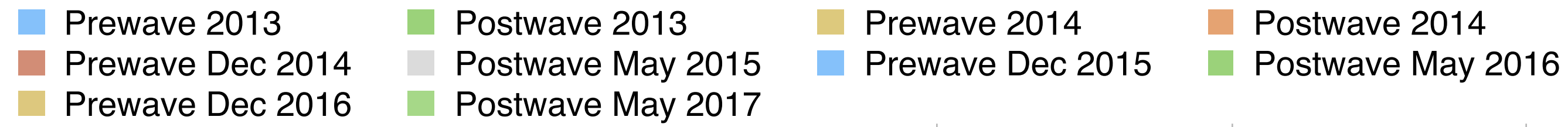
AWARENESS OF ADS FOR FL PRODUCE

- Prewave 2013
 ■ Postwave 2013
 ■ Prewave 2014
 ■ Postwave 2014
- Prewave 2015
 ■ Postwave 2015
 ■ Prewave 2015
 ■ Postwave 2016
- Prewave Dec 2016
 ■ Postwave May 2017

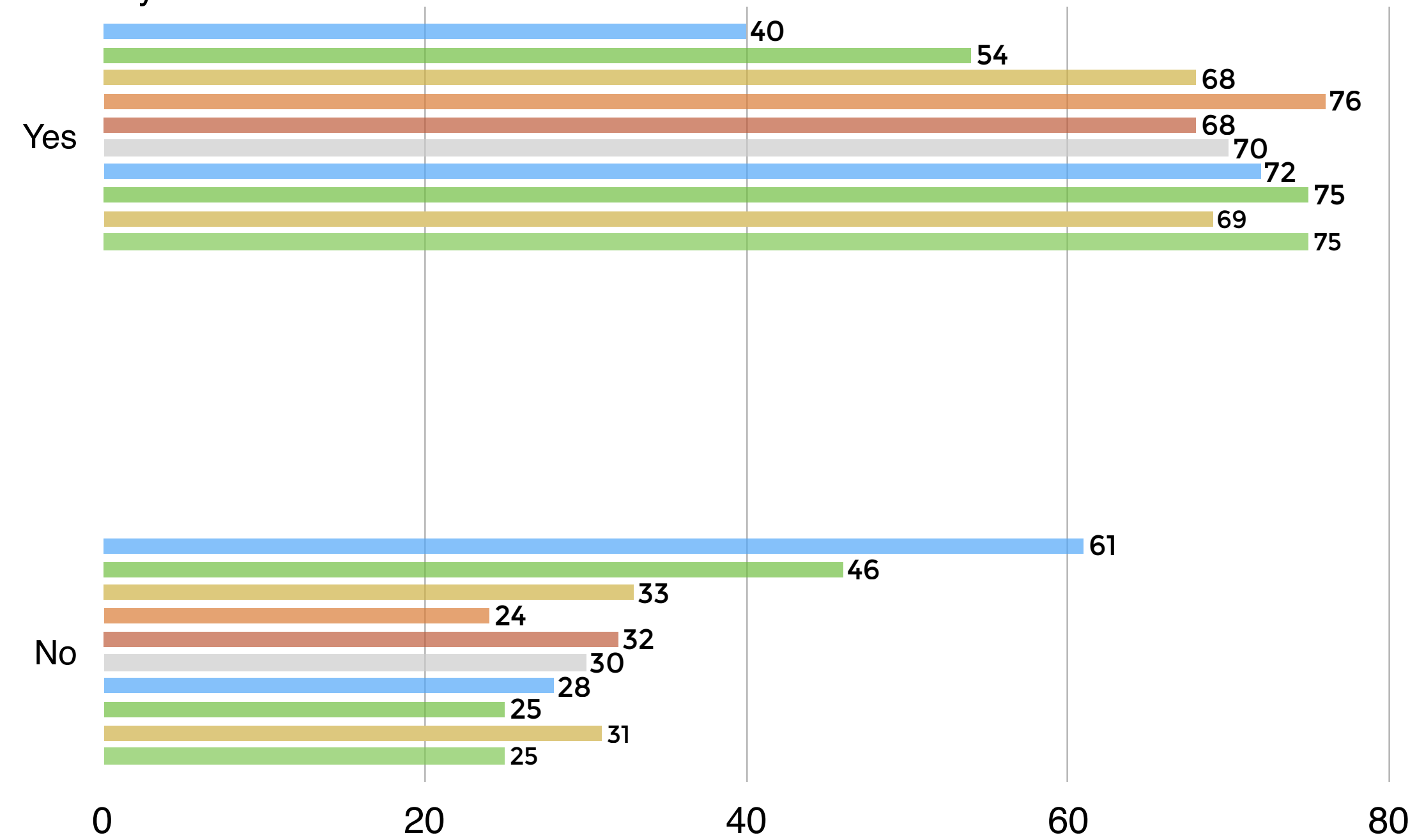
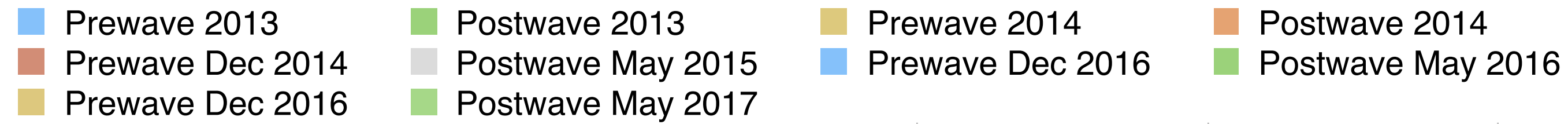


In the past several weeks, have you seen or heard any advertising or marketing promoting Florida-grown produce?

AWARENESS OF ADS FOR FL SEAFOOD

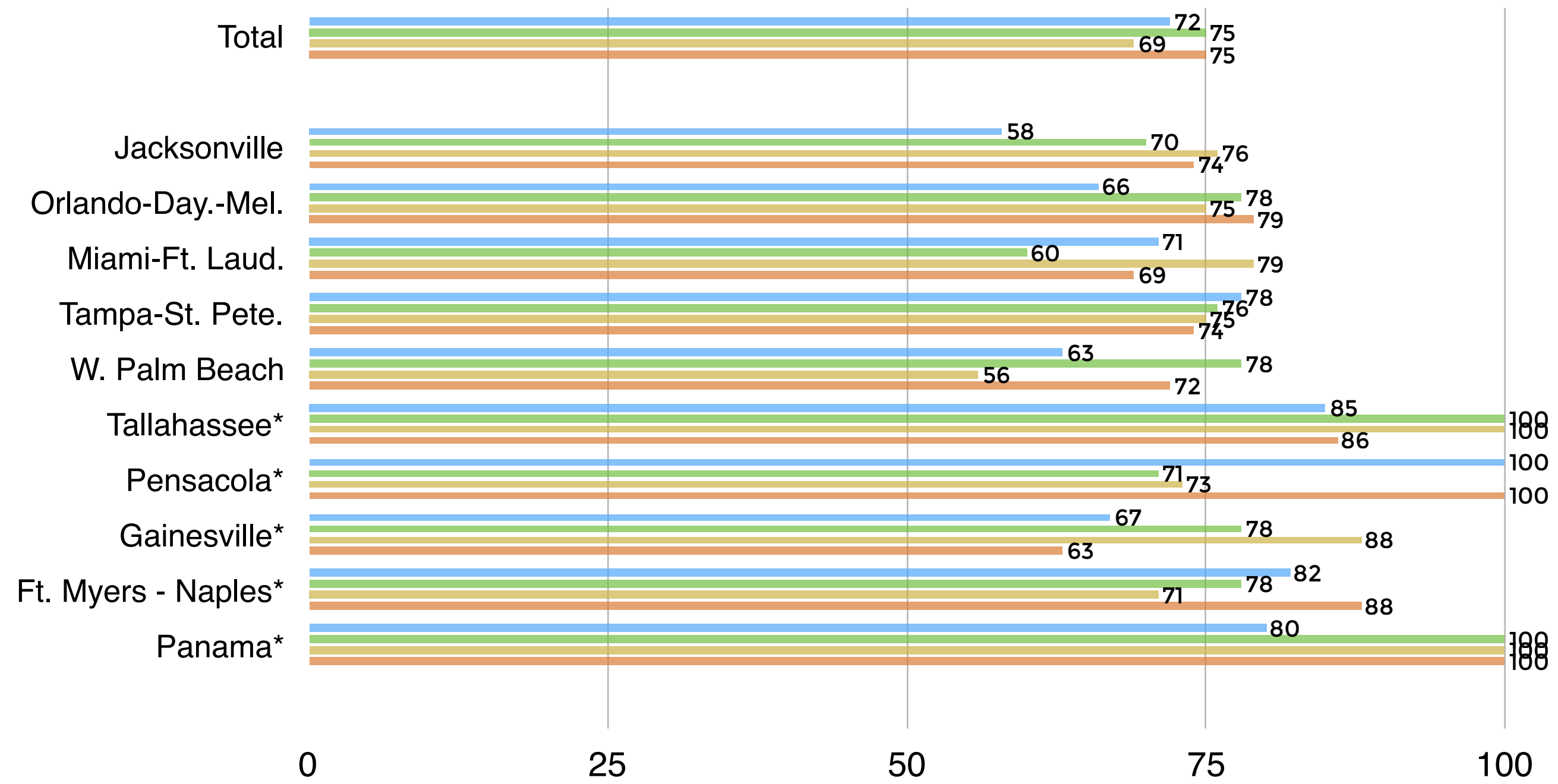


AWARENESS OF FRESH FROM FLORIDA



AWARENESS OF FRESH FROM FLORIDA

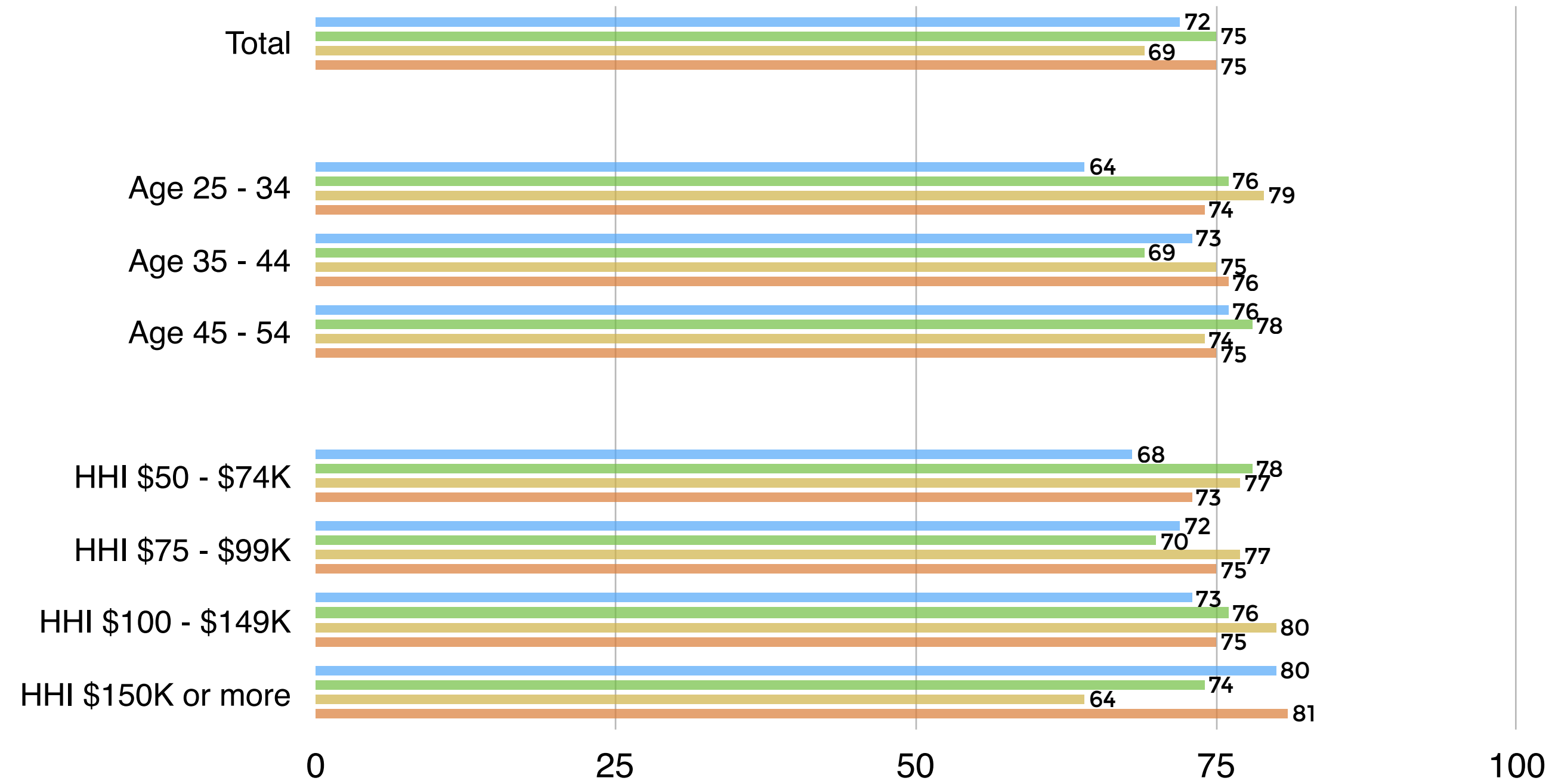
■ Prewave Dec 2015 ■ Postwave May 2016
■ Prewave Dec 2016 ■ Postwave May 2017



Have you ever heard the phrase "Fresh From Florida"?

AWARENESS OF FRESH FROM FLORIDA

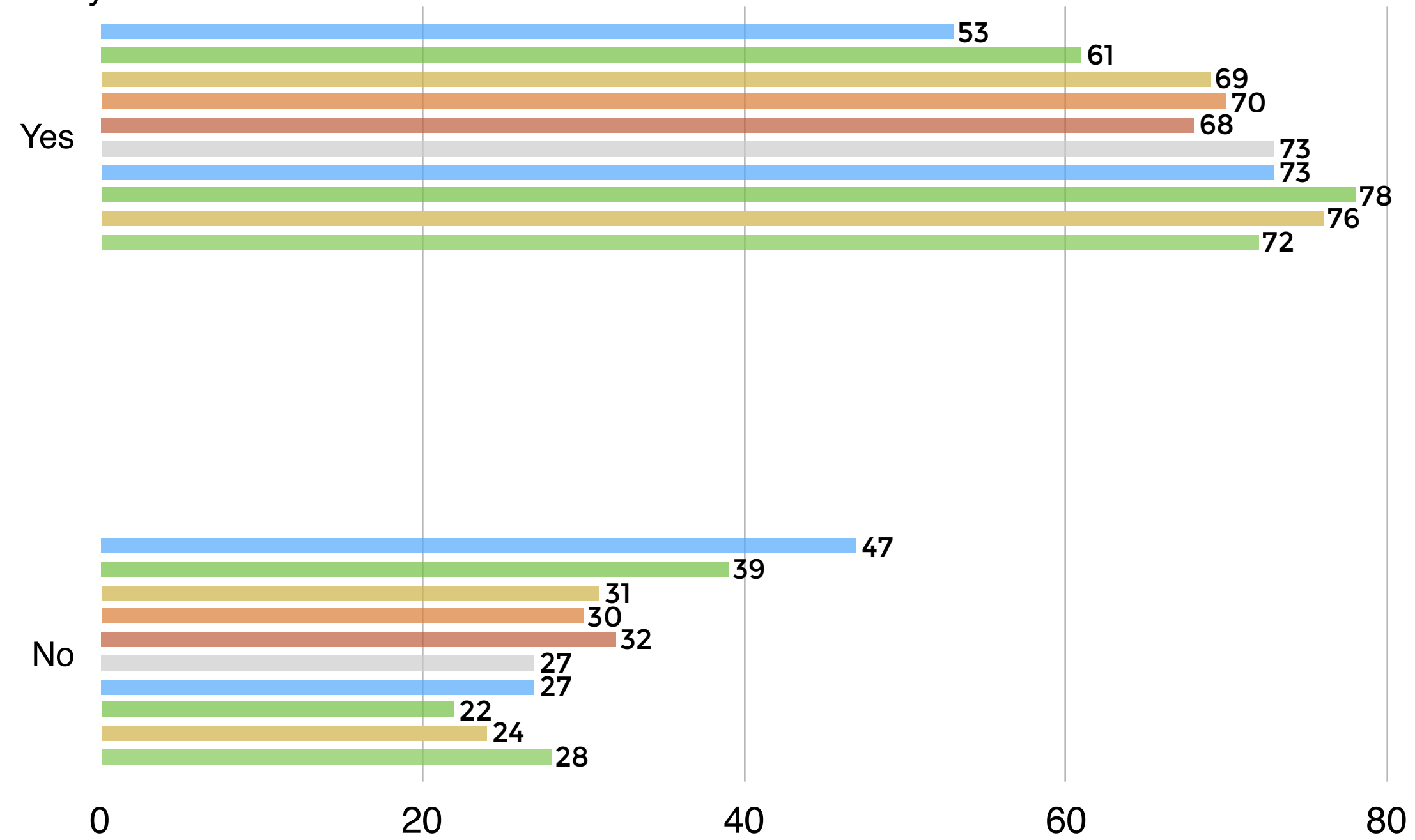
■ Prewave Dec 2015 ■ Postwave May 2016
■ Prewave Dec 2016 ■ Postwave May 2017



Have you ever heard the phrase "Fresh From Florida"?

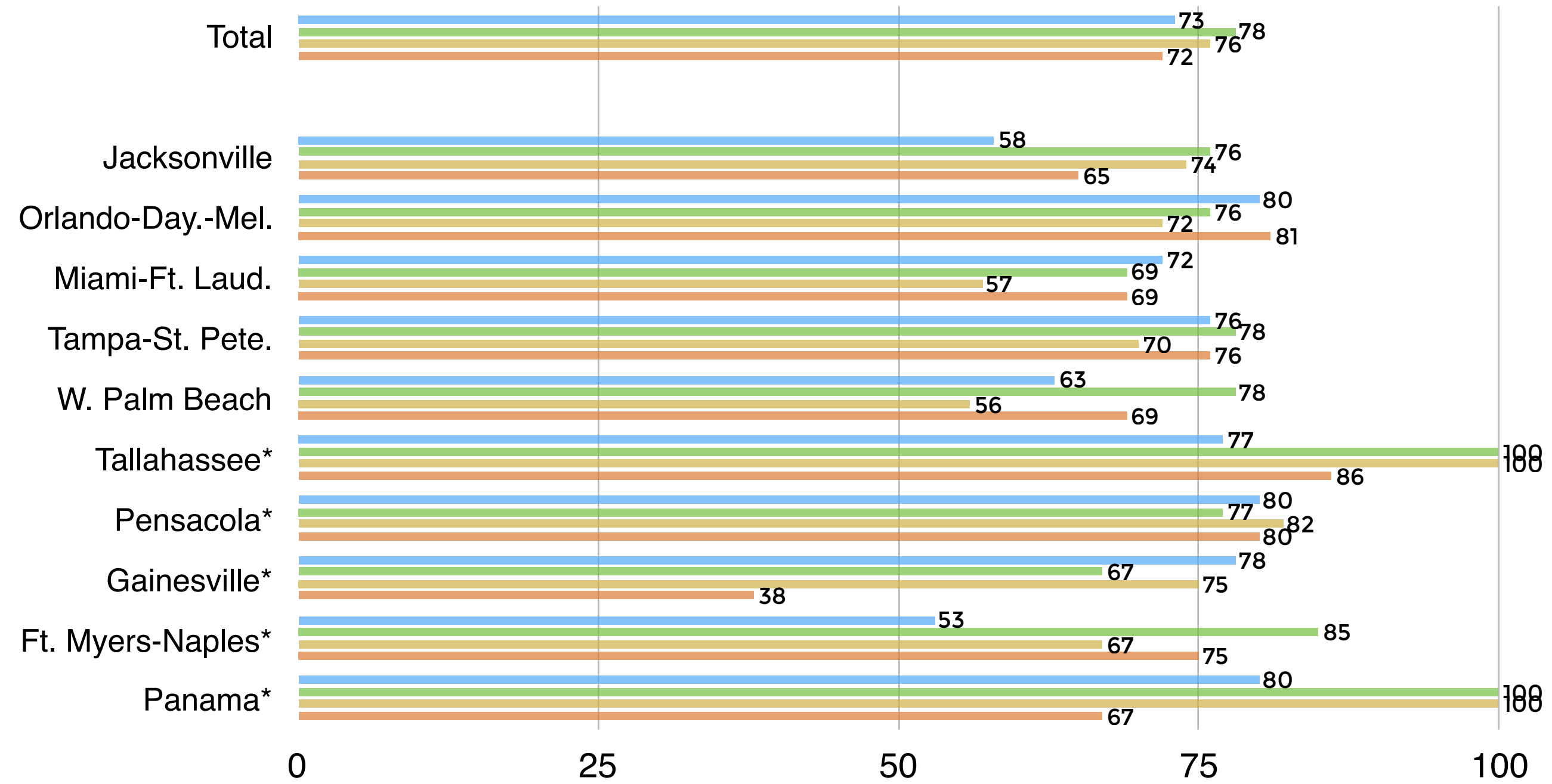
AWARENESS OF FFF LOGOS

- Prewave 2013 ■ Postwave 2013 ■ Prewave 2014 ■ Postwave 2014
- Prewave Dec 2014 ■ Postwave May 2015 ■ Prewave Dec 2015 ■ Postwave May 2016
- Prewave Dec 2016 ■ Postwave May 2017



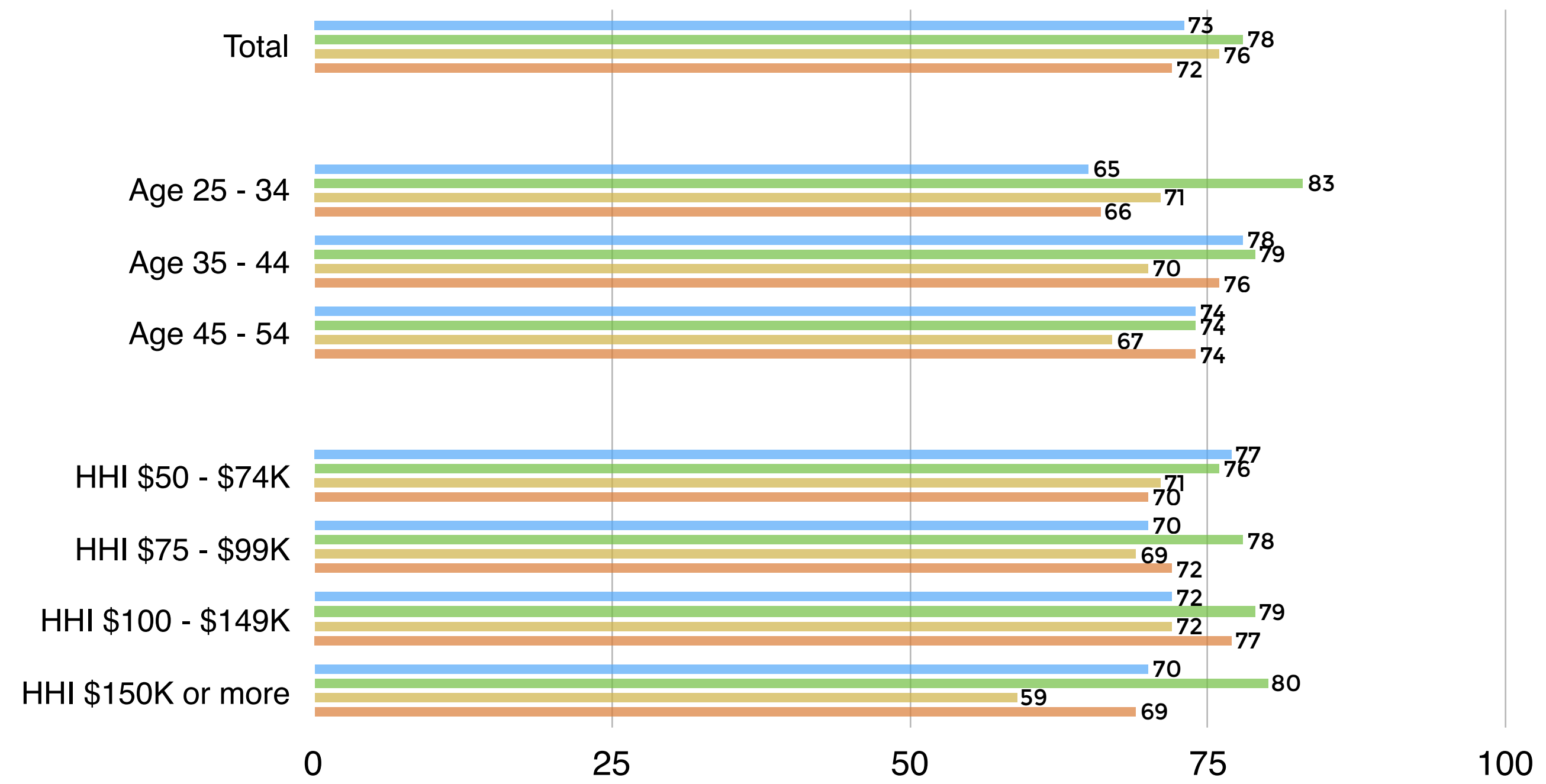
AWARENESS OF FFF LOGOS

■ Prewave Dec 2015 ■ Postwave May 2016
■ Prewave Dec 2016 ■ Postwave May 2017



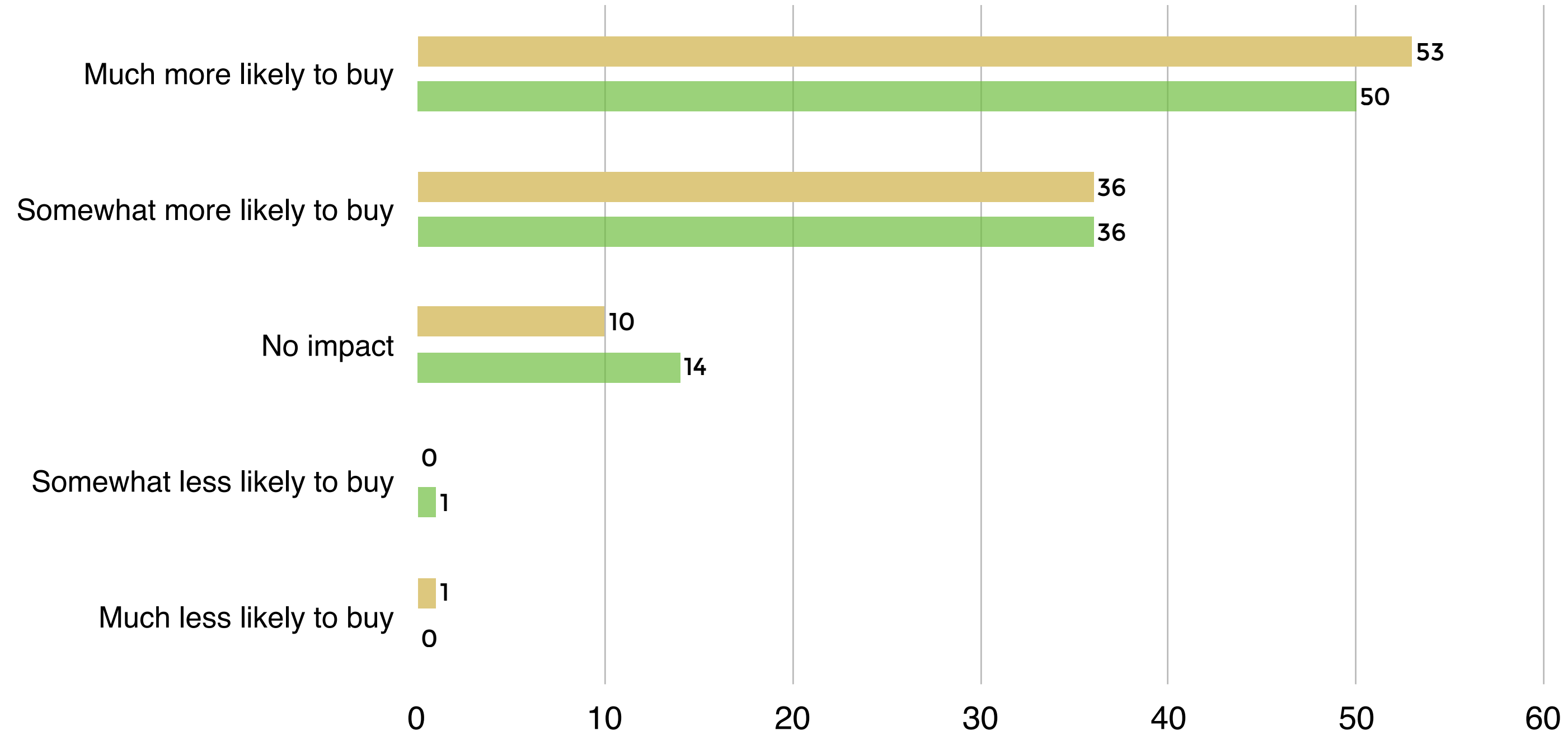
AWARENESS OF FFF LOGOS

■ Prewave Dec 2015 ■ Postwave May 2016
■ Prewave Dec 2016 ■ Postwave May 2017

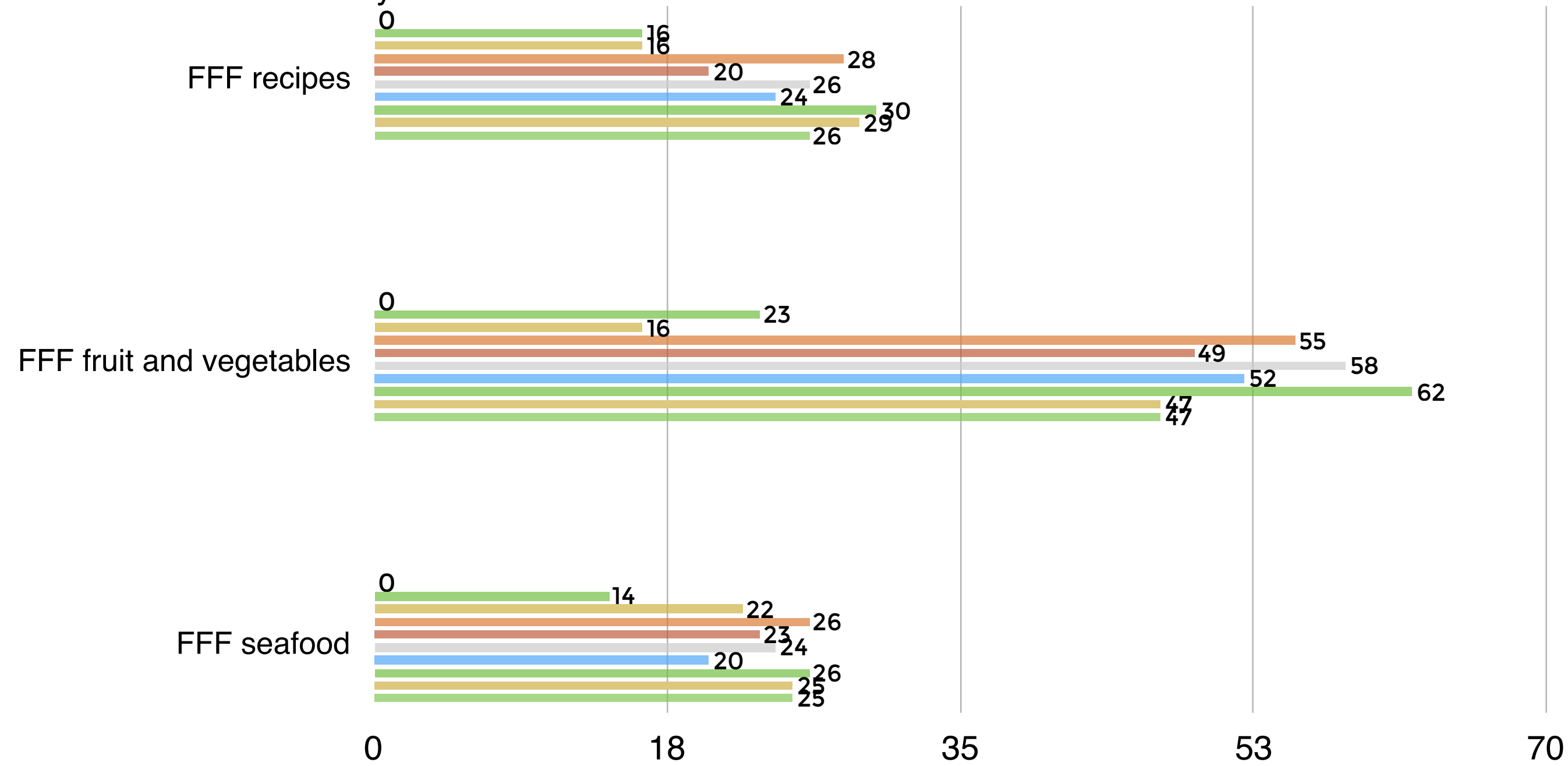
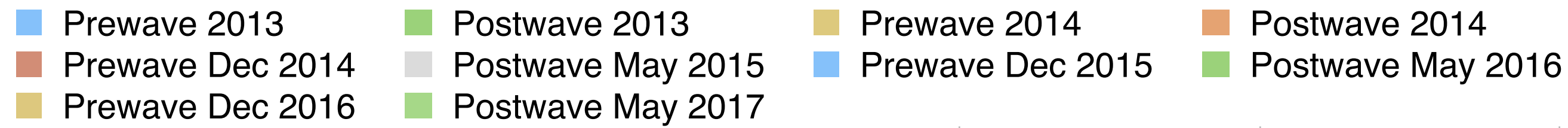


IMPACT OF FFF LABEL ON PURCHASE INTENT

■ Prewave Dec 2016 ■ Postwave May 2017



AWARENESS OF ADS



Have you seen or heard any advertising promoting “Fresh From Florida” recipes?

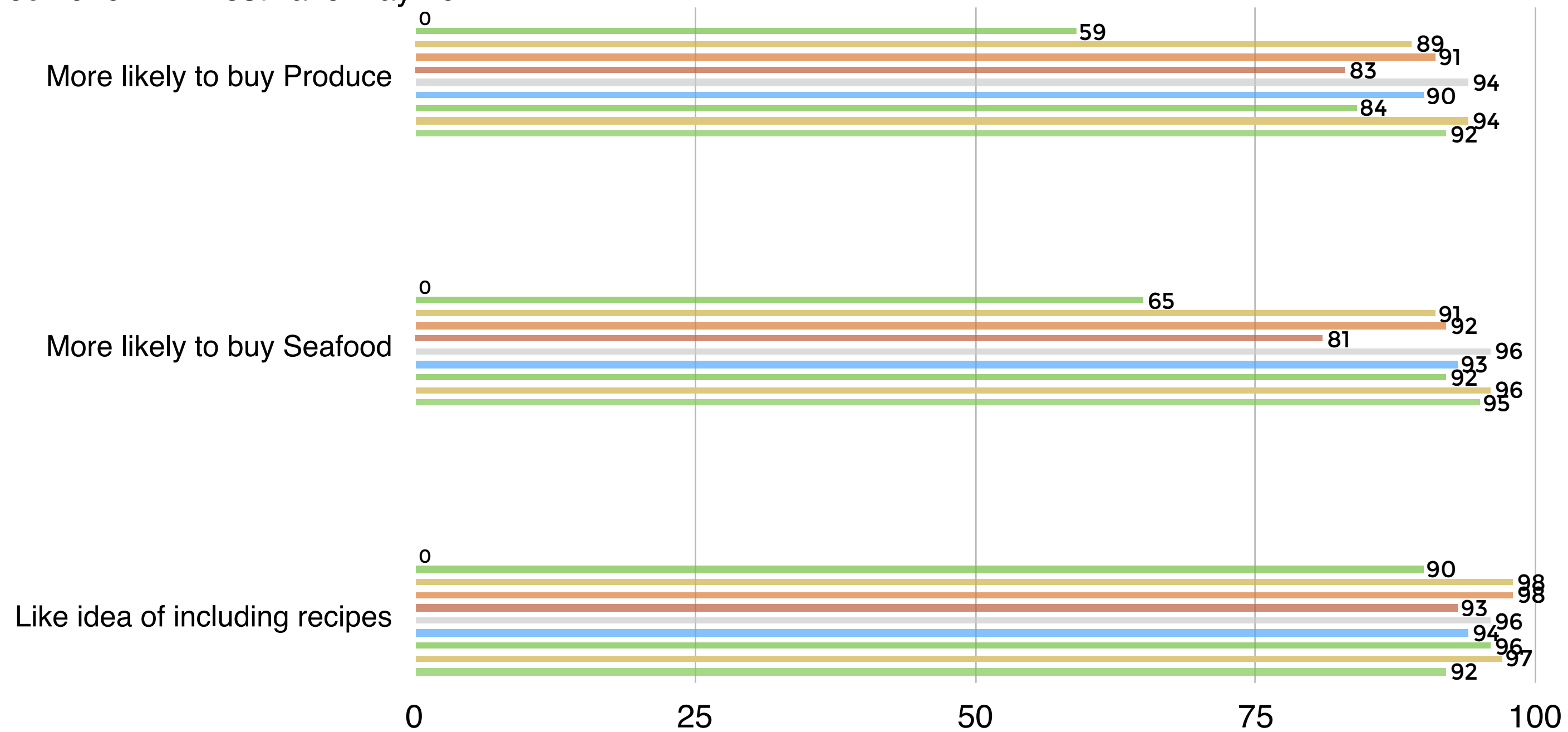
Have you seen or heard any advertising promoting “Fresh From Florida” fruit and vegetables?

Have you seen or heard any advertising promoting “Fresh From Florida” seafood?

ADVERTISING AWARENESS

(among those who have seen them)

- Prewave 2013 ■ Postwave 2013 ■ Prewave 2014 ■ Postwave 2014
- Prewave Dec 2014 ■ Postwave May 2015 ■ Prewave Dec 2015 ■ Postwave May 2016
- Prewave Dec 2016 ■ Postwave May 2017



Did this ad make you [much more likely, somewhat more likely, less likely, no impact] to purchase FFF produce?

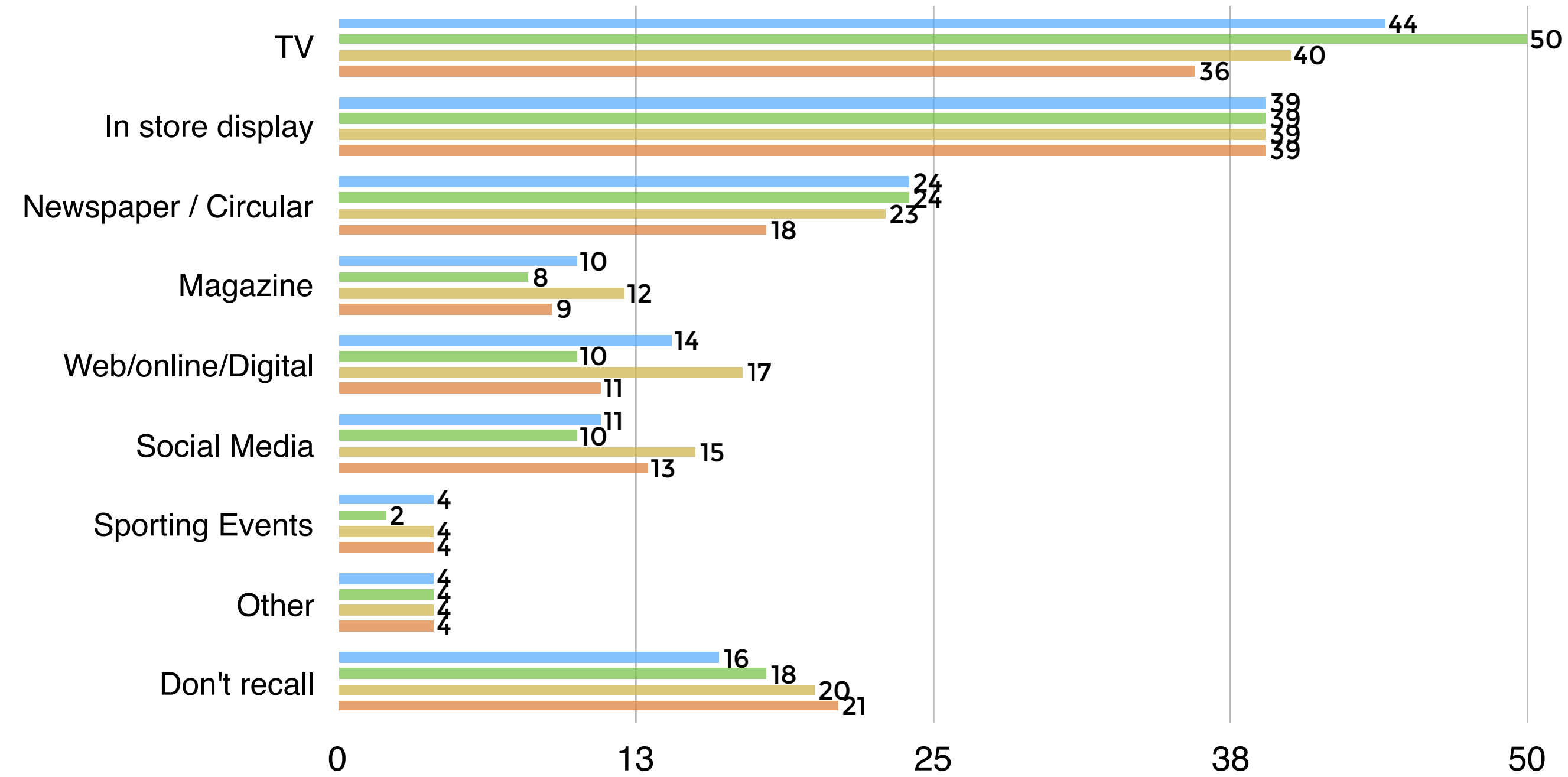
Did this ad make you [much more likely, somewhat more likely, less likely, no impact] to purchase FFF seafood?

Do you like the idea of including recipes in the ad?

WHERE SEEN FFF LOGOS

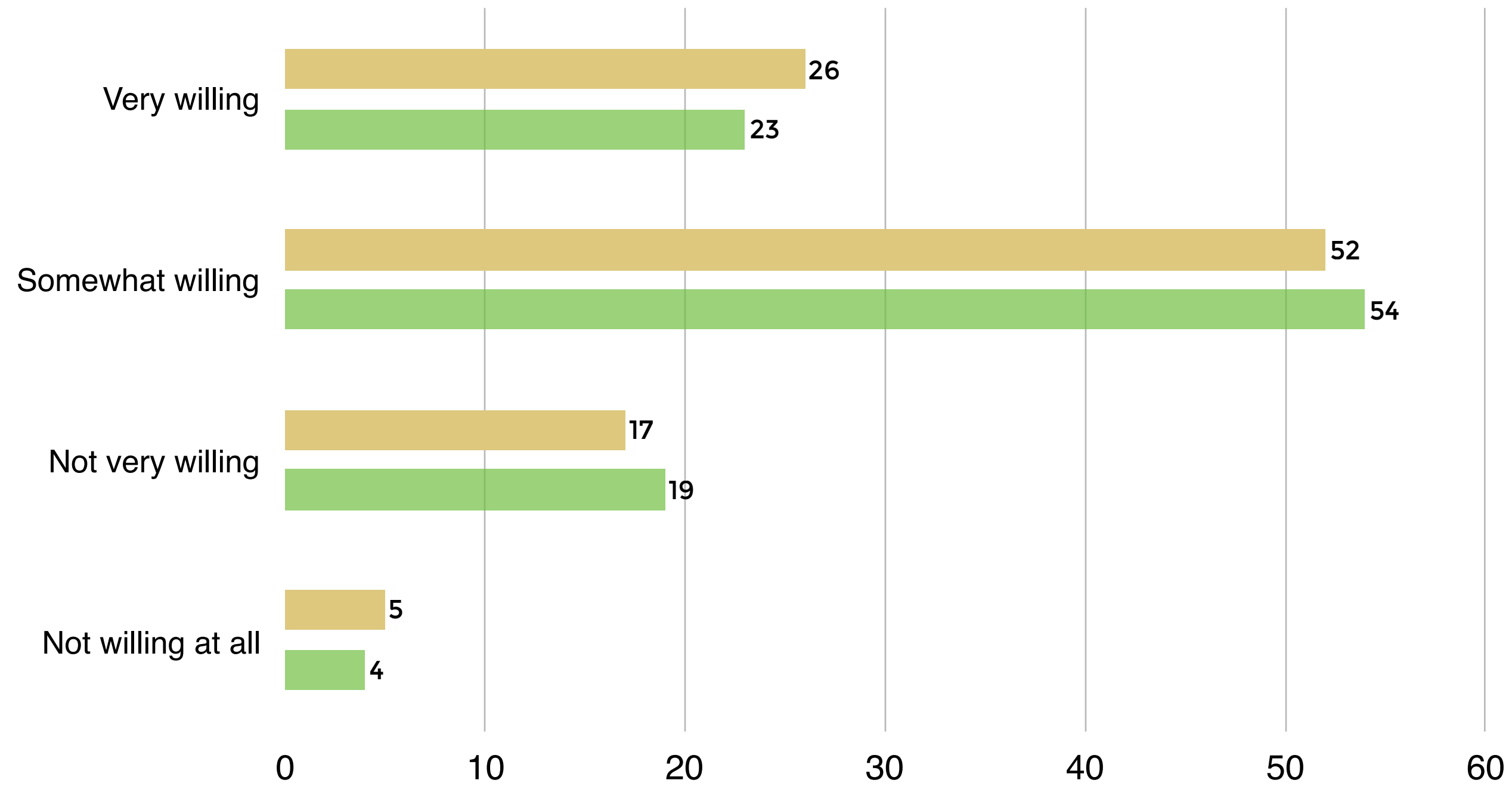
(AMONG THOSE WHO HAVE SEEN THEM)

- Prewave Dec 2015
- Postwave May 2016
- Prewave Dec 2016
- Postwave May 2017



WILLINGNESS TO PAY MORE FOR FFF

■ Prewave Dec 2016 ■ Postwave May 2017



CONCLUSION



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CONCLUSION

The campaign continues to be successful

Most of the target audience is aware

Important to maintain progress made to-date

Increasing, focus will need to include engagement

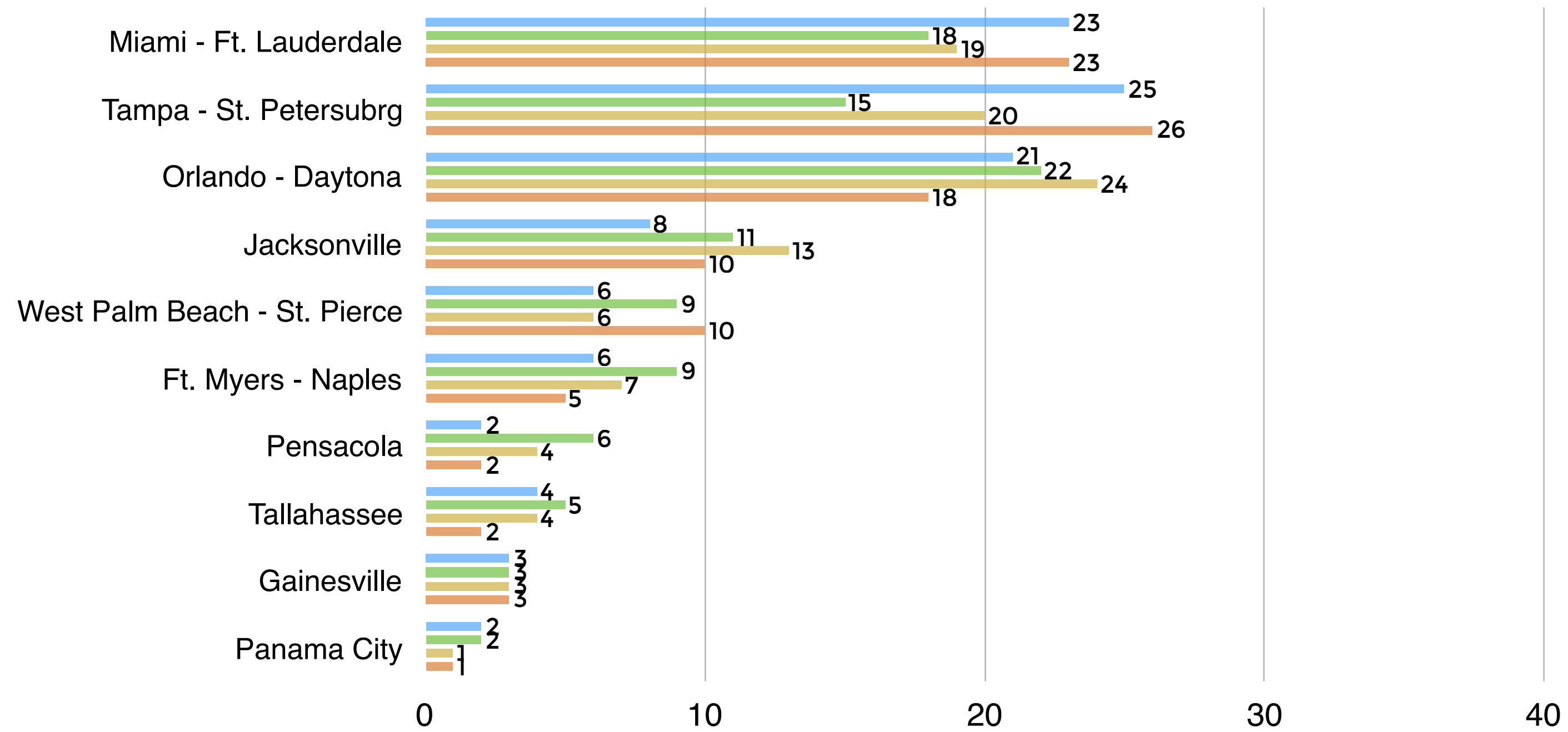
STUDY DEMOGRAPHICS



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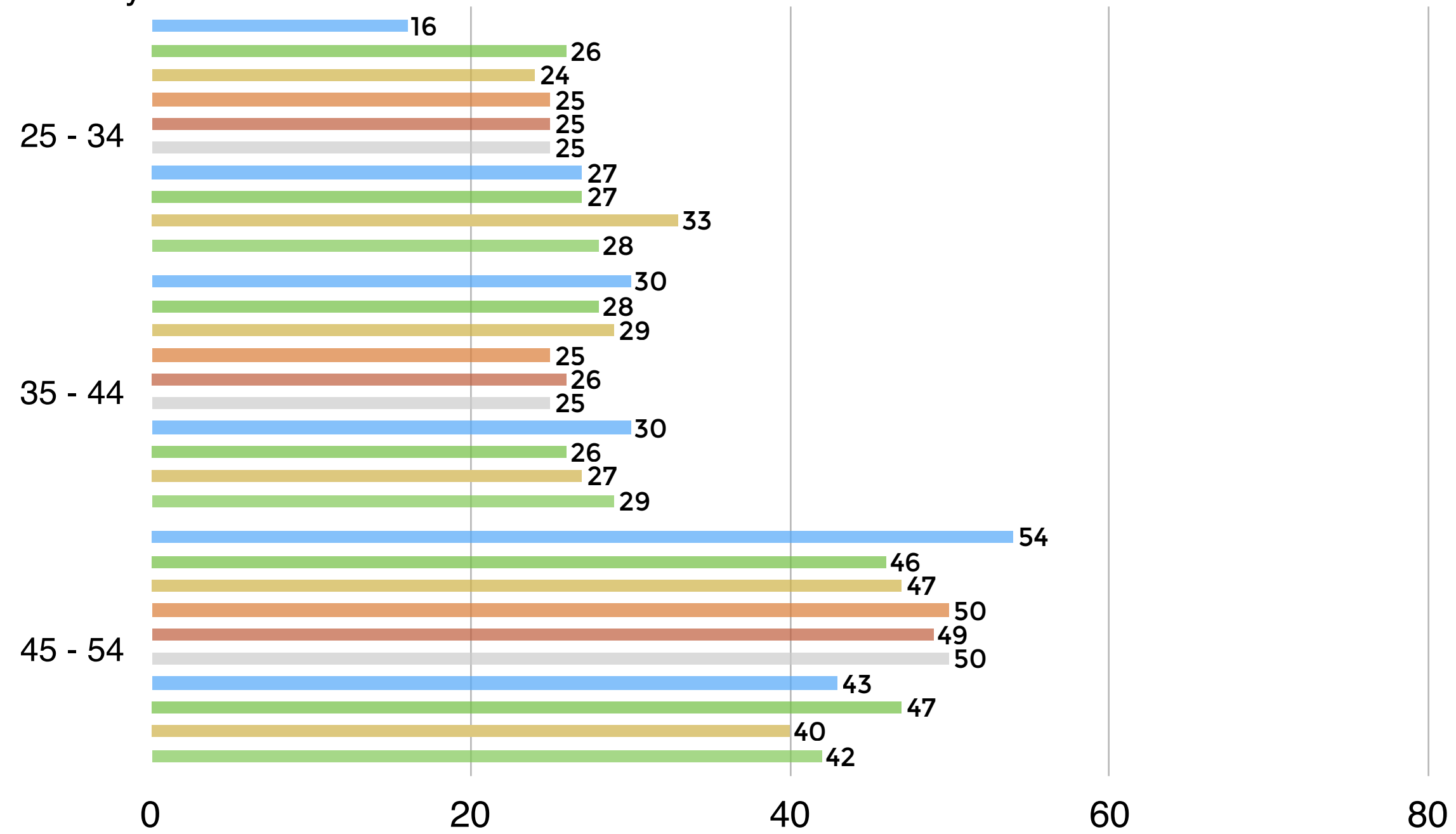
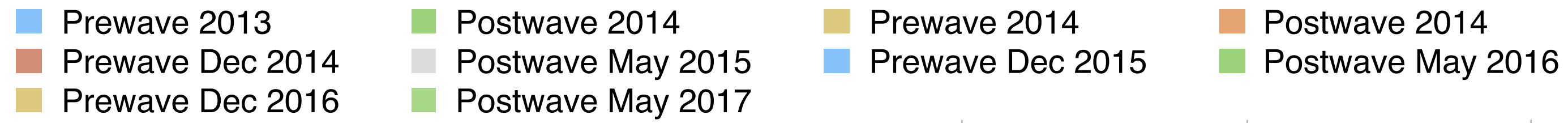
MARKET

■ Prewave Dec 2015 ■ Postwave May 2016
■ Prewave Dec 2016 ■ Postwave May 2017



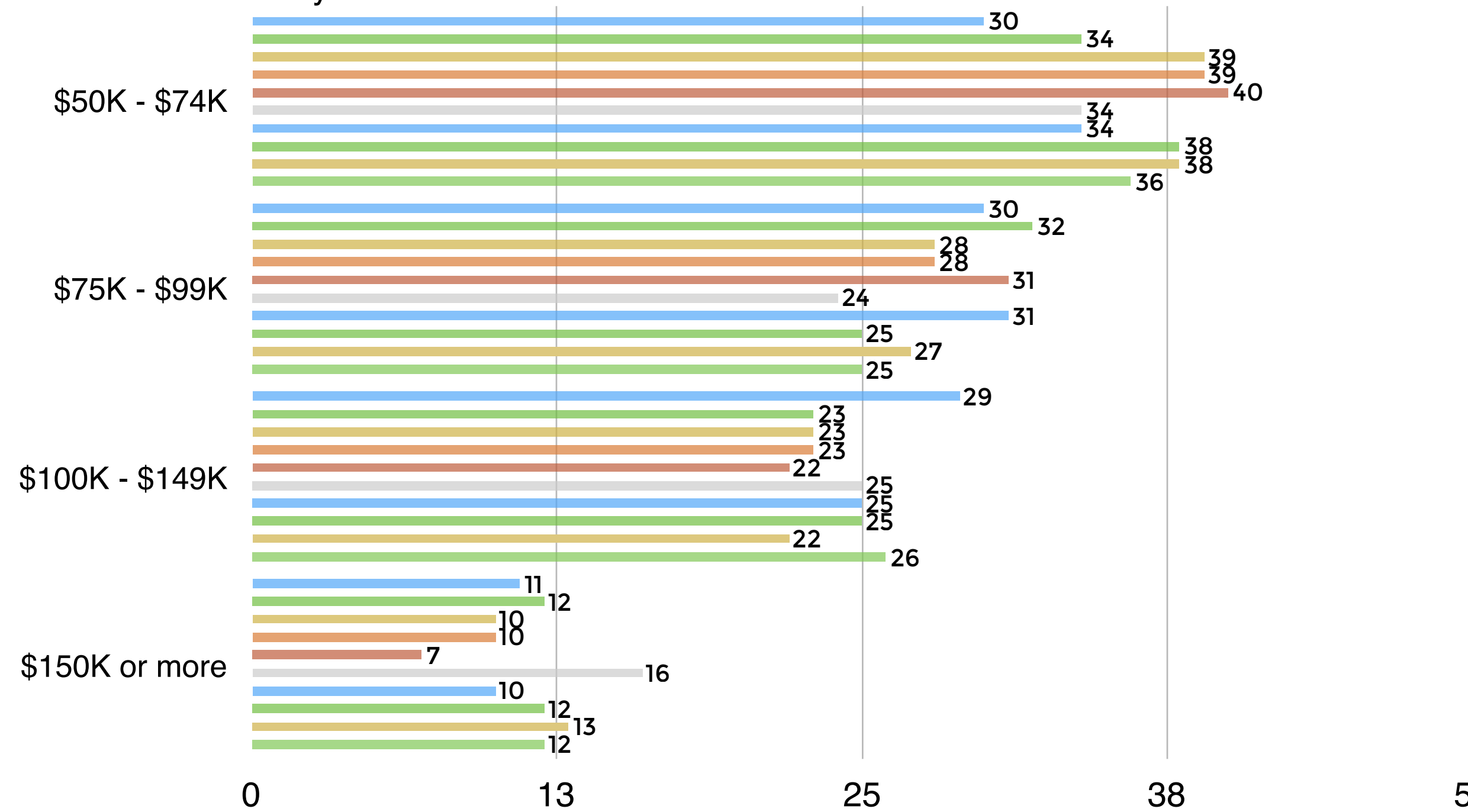
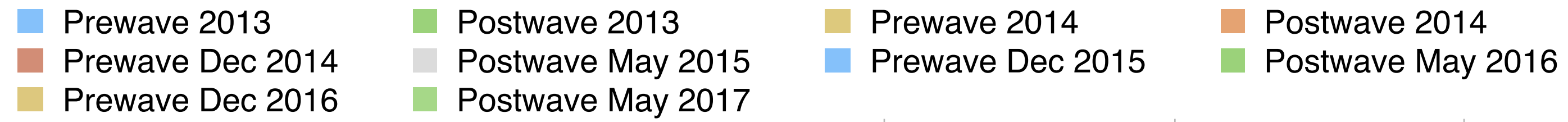
Which of the following best describes the area of Florida in which you live?

AGE



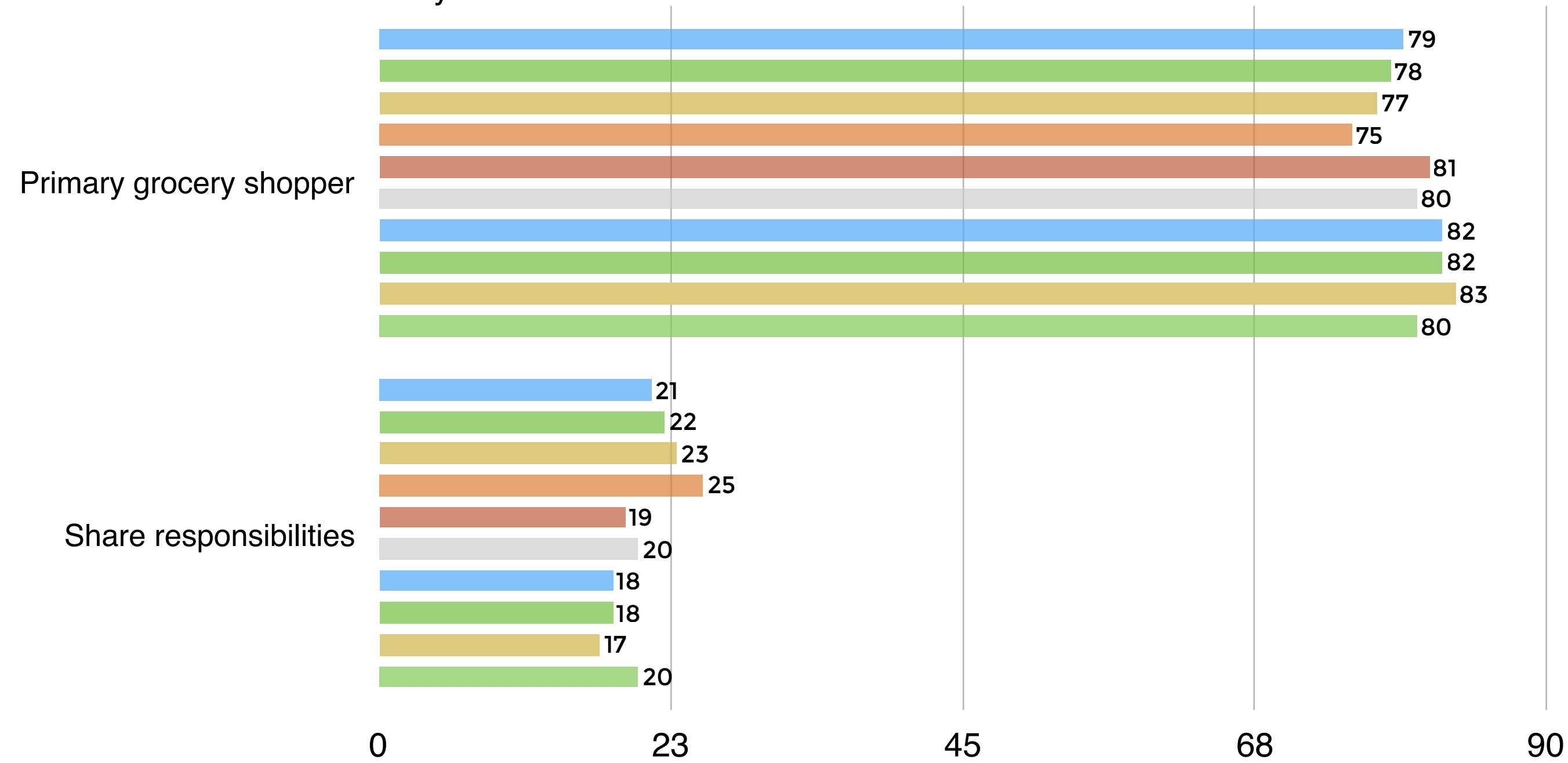
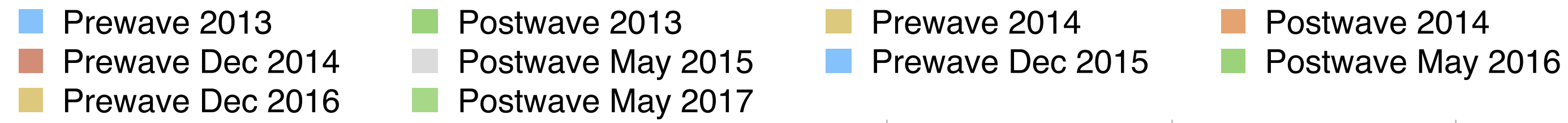
Into which of the following categories does your age fall?

HOUSEHOLD INCOME

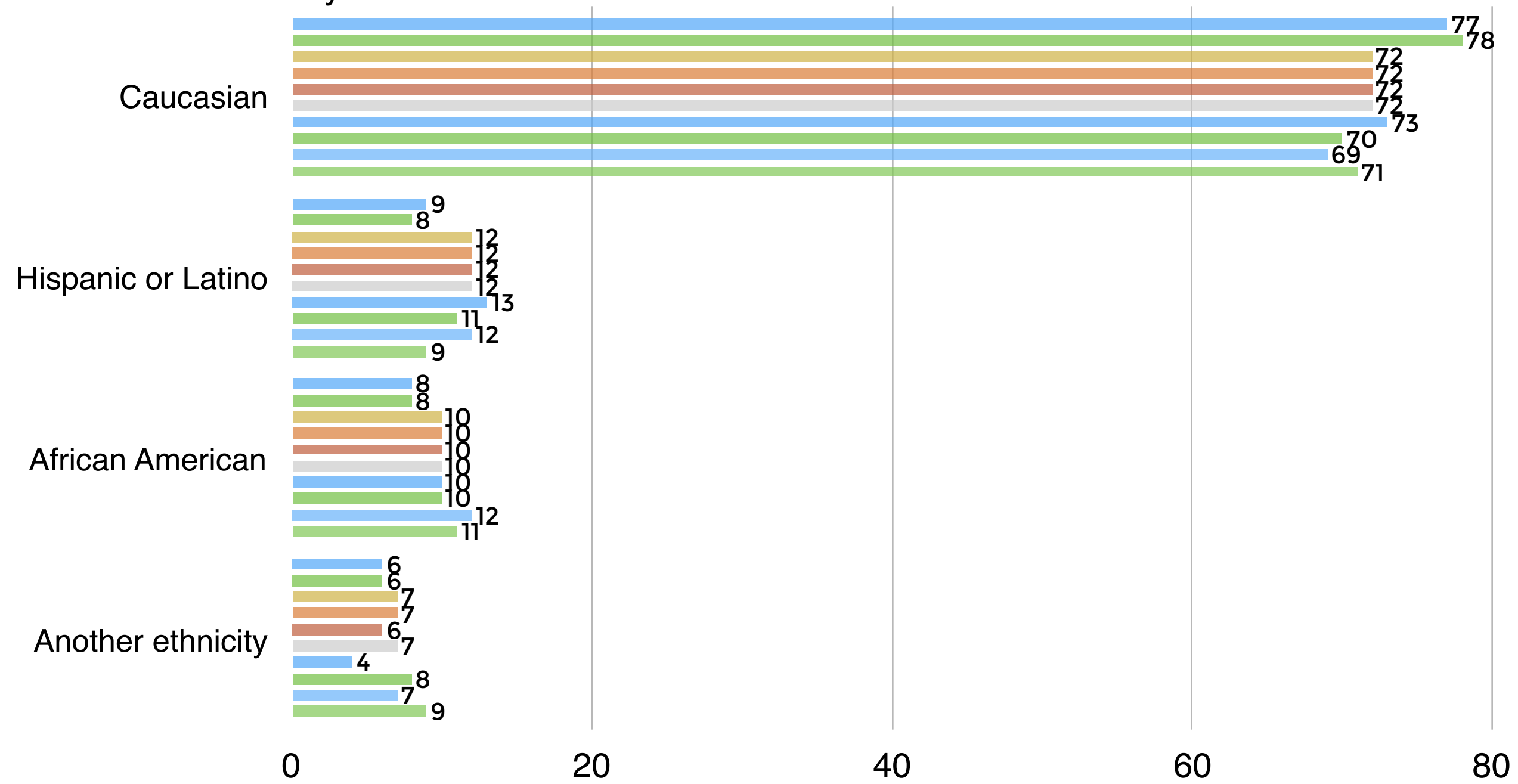
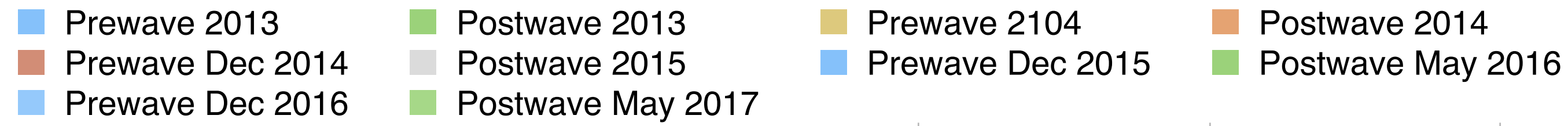


Into which of the following categories does your total household income fall (before taxes)?

ROLE AS SHOPPER



ETHNICITY





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