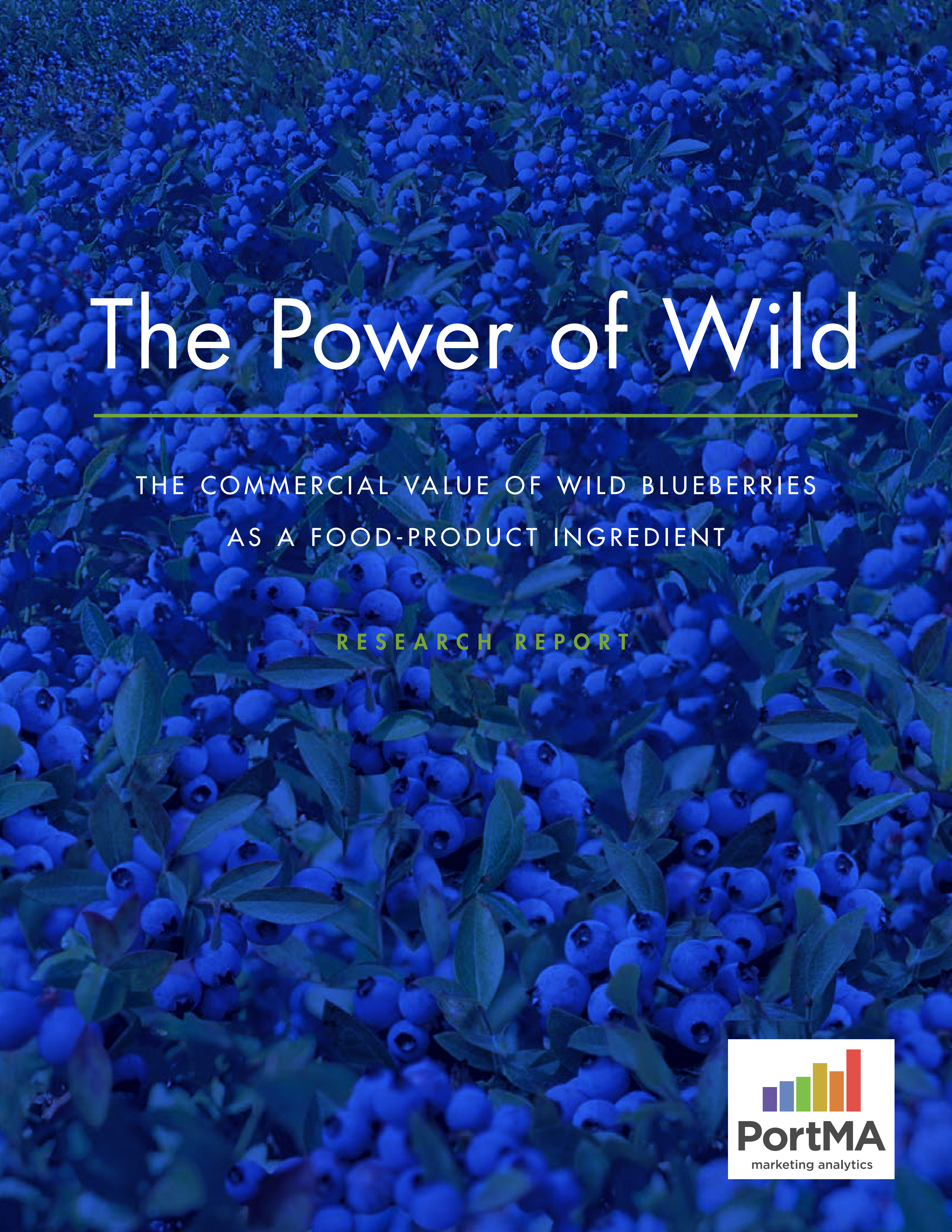


The Power of Wild

THE COMMERCIAL VALUE OF WILD BLUEBERRIES AS A FOOD-PRODUCT INGREDIENT

RESEARCH REPORT

PortMA
marketing analytics

The Power of Wild

THE REPORT AT A GLANCE

Members of the packaged-food and food-service trade routinely must decide what ingredients to include in the products they sell to consumers. The purpose of this report is to identify the factors associated with an increased or decreased correlation between the use of wild foods in consumer products, and specifically, the consumer product preferences of Wild Blueberries vs. regular cultivated blueberries.

Using three studies, we examined the data collected from a cross-section of consumers to discover their perspectives and attitudes about "wild foods," then how foods containing Wild Blueberries would perform in the market today vs. those utilizing regular blueberries.

These findings then were directly correlated with the commercially desirable behaviors of purchase likelihood, purchase volume, and reduced-price sensitivity. Further examination addressed the roles that taste, health, sustainability, and resulting sentiment play when a consumer chooses between a product containing Wild Blueberries and the same product containing cultivated blueberries.

Summary of Key Findings:

1. "Wild foods" are premium in the context of health and taste benefits.
2. "Wild foods" and Wild Blueberries deliver enhanced consumer preference because they imply food in its purest form.
3. Including and labeling Wild Blueberries (instead of cultivated blueberries) in a product increases purchase intent, purchase volume, and price premium in multiple categories.
4. Consumers believe Wild Blueberries make a product taste better, healthier, and more sustainable, and consumers feel better about themselves when eating it.
5. LOHAS* brands are best positioned to leverage "The Power of Wild."

FOOD PRODUCTS STUDIED

Yogurt
Muffins
Smoothies
Jams/Preserves
Ice Cream/Frozen Yogurt

CONTENTS

MORE INFORMATION:

For questions regarding this research, email wbresearch@wildblueberries.com.

* Lifestyles of Health and Sustainability

REAL FOODS TREND

Food technicians and members of the food trade routinely use consumer trends, habits, and perceptions to decide what foods to develop and what ingredients to use. **One trend that has been gaining momentum is the demand for natural, less processed, authentic food options.** This "Real Food" movement has been categorized as "farm-to-table," or "clean eating." It has also been characterized over the years by a consumer preference for foods labeled natural, free range, organic and non-GMO.

Mark Schatzker, noted food journalist and author of "The Dorito Effect" (Simon & Schuster; 2015), describes this trend as, "People trying to get back to real food."

WHY WILD?

On the surface, the idea of "wild" foods seems to be the perfect embodiment of this consumer trend. However, outside avant-garde, trendy restaurants, "wild" is rarely used as a descriptor of food products. The list of mass-market, wild-labeled foods is surprisingly limited. After "Wild Salmon," "Wild Rice," and "Wild Blueberries," it becomes increasingly difficult to cite additional items that are readily available.

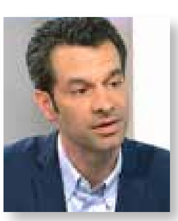
Yet, wild foods—and specifically foods made with Wild Blueberries—are consistently popular across a wide variety of categories.

Two kinds of blueberries

CULTIVATED

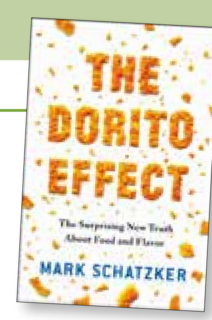
WILD

Blueberries are divided into two distinct and important categories. There are cultivated blueberries (sometimes referred to as "highbush") that are planted all over the world and "lowbush" Wild Blueberries that have spread and evolved in the wild fields and barrens of Maine and Eastern Canada for more than 10,000 years.



"People are looking for food that tastes the way Mother Nature intended."

Mark Schatzker, author of "The Dorito Effect," 2015[1]



1 Schatzker, M. (2015). Personal communication, Aug. 27, 2015.

COMPANIES AHEAD OF THE CURVE

PANERA BREAD

Tom Gumpel, head baker at Panera Bread, states: "Our customers are looking for food that is clean, fresh for sure, tastes awesome, and, you know, food as it should be. Here at Panera®, one of our best-selling baked goods is the Wild Blueberry scone. We rotate flavors out seasonally or for the holidays, but the Wild Blueberry scone is the one item that hasn't left the menu. I couldn't get rid of it. There'd be a backlash from our customers if I got rid of that." (Gumpel, 2015)[2]

STONEWALL KITCHEN

The popularity of Wild Blueberries is further evidenced by Michele Cole, culinary product developer at Stonewall Kitchen, who reports that Wild Maine Blueberry Jam is the company's No. 1–selling product. (Cole, 2015)[3] So, while there is anecdotal evidence across industries of "wild foods" and a "Wild Blueberry" cachet, there has been rather limited commercial adoption of wild-food products (outside only the most obvious categories of salmon, rice, mushrooms and of course, blueberries).

IS 'WILD' A NEW TREND?

The research was designed to identify the factors associated with an increased or decreased correlation between the use of Wild Blueberries in consumer products and consumer product preference. The authors of the study sought to definitively evaluate the legitimacy of the assumption that "wild foods" represent a new trend toward real or whole foods and if this assumed connection extends to Wild Blueberries.

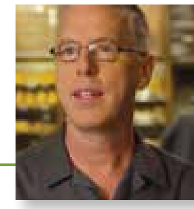
The goal was to measure how purchase intent varies by food category when Wild Blueberries are highlighted, vs. cultivated blueberries, to define the impact of "wild" specifically. If incremental appeal was found to be linked to Wild Blueberries, the research then needed to quantify the additional commercial value and explore potential reasons for this additional value.

2 Gumpel, T. (2015). Personal communication, Sept. 29, 2015. Any product names, logos, brands, and other trademarks or images featured or referred to within this report are the property of their respective trademark holders. The trademark holders are not affiliated with this research. They did not sponsor or endorse this research.

3 Cole, M (2015). Personal communication, Aug. 10, 2015.

"I don't think the Wild Blueberry story has been told, and it's going to be."

Tom Gumpel, head baker at Panera Bread



FOOD PRODUCTS STUDIED

Research of consumer food-purchase behavior was organized around five food categories: Smoothies, Muffins, Jams/Preserves, Yogurt, and Ice Cream/Frozen Yogurt. Where appropriate, these food categories were subgrouped into purchase scenarios, including packaged goods or food service.

To base the research on real-world examples, food categories were anchored with well-known brands containing blueberries that included Smuckers®, King Arthur Flour®, Panera Bread®, Jamba Juice®, Entenmann's®, Little Bites®, Odwalla®, Chobani®, and Ben & Jerry's®[4].

Categories Studied

SMOOTHIES

MUFFINS

YOGURT

JAMS & PRESERVES

ICE CREAM & FROZEN YOGURT

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Research Goal

The goal was not to test blueberries as an ingredient in and of itself, but to test the influence of the Wild Blueberry call-out on a package or menu.

The food categories selected already had a well-established blueberry market. The goal was not to test blueberries as an ingredient in and of itself, but to test the influence of the Wild Blueberry call-out on a package or menu and measure the order of magnitude associated with any increase or decrease in purchase behavior when a consumer is faced with the choice of a product containing blueberries vs. Wild Blueberries. Nothing else was modified in the visual comparisons.

CONSUMER TYPES—GENERAL VS. LOHAS

Two consumer types were targeted for the research. The results were segmented by these groups accordingly. The first was the general population of U.S. residents 18 years of age or older. This general population was chosen to establish an understanding of the typical consumer and their attitudes toward the inclusion of cultivated vs. Wild Blueberries in the food products brought.

The second group was selected to obtain perspective from consumers who self-report health and environmental sustainability as a driving value in the foods they buy. Identified in other research as the LOHAS ("Lifestyles of Health and Sustainability") consumer, group members were identified by asking the extent to which they feel the following statement described them: "I live a healthy lifestyle that includes socially responsible decisions. I prefer minimally processed foods that are provided using sustainable practices." Response to this question was measured on a five-point scale with the top box labeled, "5–Describes Me Completely" and the bottom box labeled, "1–Does Not Describe Me at All." Respondents reporting in the top two boxes were identified as LOHAS consumers.

LOHAS is a growing consumer demographic with significant purchase volume. Estimated to be a $290 billion U.S. marketplace, research shows that one in four adult Americans is part of this group—nearly 41 million. (LOHAS, 2015)[5] In addition, previously unpublished research by this study's authors has shown that the LOHAS consumer is a significant portion of the blueberry and Wild Blueberry public. Finally, because of its purchasing power, this consumer segment is sought by current and emerging brands as a leading indicator of where food consumption habits are trending. As such, the research team felt that clearly identifying and segmenting the perspective of this group was warranted.

WHO IS THE LOHAS CONSUMER?

(LIFESTYLES OF HEALTH AND SUSTAINABILITY)

1 IN 4 ADULT AMERICANS

41 MILLION PEOPLE

$290 BILLION U.S. MARKET

5 LOHAS (2015). Retrieved from http://www.lohas.com/about

RESEARCH METHODOLOGY

The data collection and analysis was completed in three phases, with each designed to build on the lessons learned from the previous phase.

PHASE ONE

A short, omnibus style survey asked 800 U.S. consumers over age 18 to position "wild" as a food category in the context of other descriptors of "real foods." Then, their top-line perceptions of "wild foods" were explored across a number of dimensions.

PHASE TWO

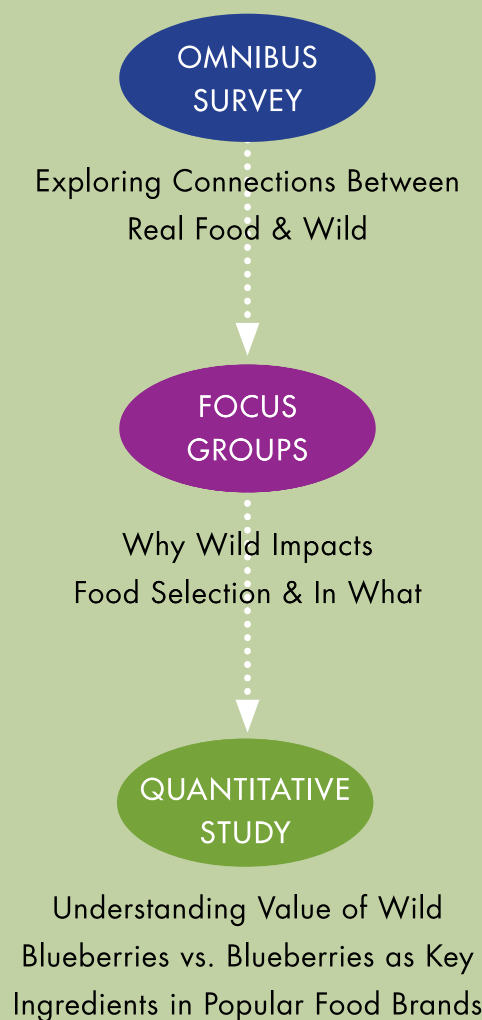
Focus groups were used to identify potential consumer attitudes toward "wild foods" in detail and how this may vary among specific food-product categories. The exploration then moved into responses to Wild Blueberries as an alternative to cultivated blueberries among the specific food categories.

The focus groups delivered a rich, informative set of perspectives around what may be the factors influencing perception of wild foods and how Wild Blueberries impact attitudes toward a food product when contrasted with cultivated blueberries. However, the findings needed to be validated and quantified among general consumers.

PHASE THREE

A comprehensive, national survey of 1,009 U.S. consumers over 18 years of age was conducted as the third and final stage of the research. Consumers were profiled based on their LOHAS status and the foods they typically purchase, then invited to report on their opinion and potential behavior toward "blueberry" or "Wild Blueberry" versions of the known brands. Each food category was rated in the context of purchase intent, frequency, volume, and price sensitivity. Respondents were invited to report on dimensions of health, taste, sustainability, and personal sentiment.

Uncovering Consumer Attitudes Around Wild



Response rate varied based on the food category being tested due to the fact that consumers were invited to evaluate up to three categories randomly selected from the product categories they currently buy. Overall margin of error ranged between 4 percent and 6 percent at the 90 percent confidence level.[6]

6 Approximate survey response by product category: Store-bought Smoothie (198), Prepared Smoothie (254), Muffin Mix (284), Prepared Muffin (318), Store-Bought Muffin (318), Jams/Preserves (364), and Yogurt (424), Ice Cream/Frozen Yogurt (433).

KEY FINDINGS

KEY FINDING #1

'WILD FOODS' ARE PERCEIVED AS PREMIUM IN THE CONTEXT OF HEALTH AND TASTE BENEFITS.

The Phase One top-line national survey validated the premise that "wild" is an expression of the movement toward "real foods." It demonstrated that the value of "wild food" was only maximized when it was measured in the context of the perceived value it provides.

Consumers were asked, "Which of the following terms do you believe describes nature's real or whole foods?" and given the options "Organic," "Natural," "Sustainable," "Wild," or "None" in a randomized order (with "None" always last). Only one-fifth (17%) reported "wild" as a term that described "real foods." This perspective varied only slightly between LOHAS consumers (18%; 55) and non-LOHAS consumers (16%; 351).

However, when asked about the benefits of wild food, LOHAS consumers reported that "Wild foods are healthier, 72%;" "Tastes better, 72%;" "Would buy more wild food, 74%;" and "Would pay more for wild food, 65%." It was concluded that the health benefits and taste of "wild foods" resonates with the majority of LOHAS consumers as well as about a third of non-LOHAS.

'Wild' adds value across a number of important food-purchasing considerations.

LOHAS CONSUMERS' PERCEIVED VALUE PROVIDED BY WILD FOODS

KEY FINDING #2

'WILD FOODS' AND WILD BLUEBERRIES DELIVER CONSUMER PREFERENCE BECAUSE THEY IMPLY FOOD IN ITS PUREST FORM.

The second phase focus groups engaged a mix of consumers (on the LOHAS spectrum with a skew toward LOHAS). "Wild" was universally considered a word associated with "real or whole foods." This was rooted in the belief that "whole foods" should be "unprocessed" and "not manipulated by man." This was extended to "wild foods," which focus group participants believed should have the same qualities.

Several participants cited "wild" as the best descriptor of "real or whole foods" because it communicates the purest form in which food can exist. The idea that "wild food" was "unaltered from its original source" was a leading factor in why focus-group participants believed it fit their definition of "real or whole food."

Focus-group participants were asked to connect these ideas about wild foods with Wild Blueberries in product categories and brands they know.

The very *idea* of a Wild Blueberry was special. They understood it to be a food source that was unaltered and in its natural form. They believed the Wild Blueberry would add a taste, health, and a responsible component to their experience with any product that contained it.

We later used a quantitative study to confirm if wild foods delivered on this consumer preference for ingredients that are closer to nature. The results confirmed that the majority of respondents, 67%, consider wild foods "closer to nature" and 63% prefer ingredients closer to nature. With LOHAS consumers, this preference was even more pronounced, with 80% considering wild foods closer to nature and 91% with a preference for ingredients that are closer to nature.

'Wild' implies unaltered and in its natural form.

CONSUMERS' PREFERENCE FOR WILD FOODS

KEY FINDING #3

INCLUDING WILD BLUEBERRIES (INSTEAD OF CULTIVATED BLUEBERRIES) IN A PRODUCT INCREASES PURCHASE INTENT, PURCHASE VOLUME, AND PRICE PREMIUM.

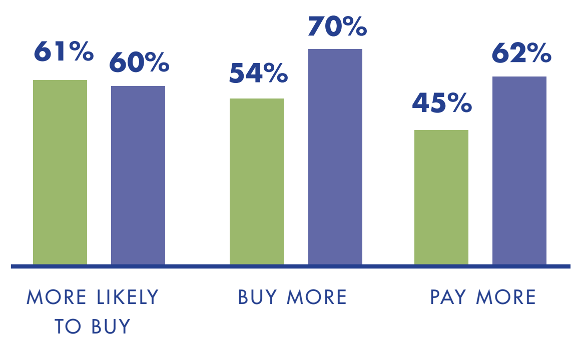
During the final phase of the research, more than 1,000 consumers were shown a variety of product images containing either Wild Blueberries or cultivated blueberries. The audience self-identifying as LOHAS consumers, using the same parameters and methods as in the first phase of the research, made up 33% of the total audience. Consumers reported that they were more likely to buy the Wild Blueberry products vs. Blueberry products, that they'd buy more, and that they'd pay more.

Impact on Purchase Intent

When shown a variety of product images containing either Wild Blueberries or cultivated blueberries, consumers reported that they were more likely to buy the Wild Blueberry products, that they'd buy more, and that they'd pay more. Nearly two-thirds (61%) of consumers report that they would be more apt to buy a product if it contained Wild Blueberries when averaged across multiple product categories. This increase was consistent among all consumers (61%) and LOHAS consumers (60%) alike. This majority attitude was true for all food-product categories.

Consumers reported that they were more likely to buy products with Wild Blueberries vs. regular blueberries. They would buy more, and they would pay more.

IMPACT OF 'WILD BLUEBERRY' VS. 'BLUEBERRY' ON A PACKAGE OR MENU



Increase Purchase Intent

Just simply calling out Wild Blueberry on your package or menu increases purchase intent.

Impact on Purchase Volume

There was equal impact on purchase volume where, averaged across product categories, 54% of consumers reported that they would buy more of a product if it contained Wild Blueberries. This increased to 70% across all product categories tested when segmenting for only LOHAS consumers. While all food categories tested demonstrated a preference for Wild Blueberries over cultivated, Store-Bought Smoothies were most preferred, with 82% of LOHAS consumers and 73% of all consumers reporting that they would buy more Store-Bought Smoothies if they contained Wild Blueberries.

Impact on Price Sensitivity

The benefits of choosing Wild Blueberries as a product ingredient over cultivated blueberries extended into price sensitivity. Just under one-half (45%) of consumers reported that they would "pay a little more" for a product that contained Wild Blueberries, when averaging across multiple product categories. This increased to 62% for LOHAS consumers.

STORE-BOUGHT SMOOTHIES

WOULD WILD BLUEBERRIES AS AN INGREDIENT MAKE YOU BUY MORE?

LOHAS: 82%

"DEFINITELY" OR "PROBABLY WOULD"

All Consumers: 73%

"DEFINITELY" OR "PROBABLY WOULD"

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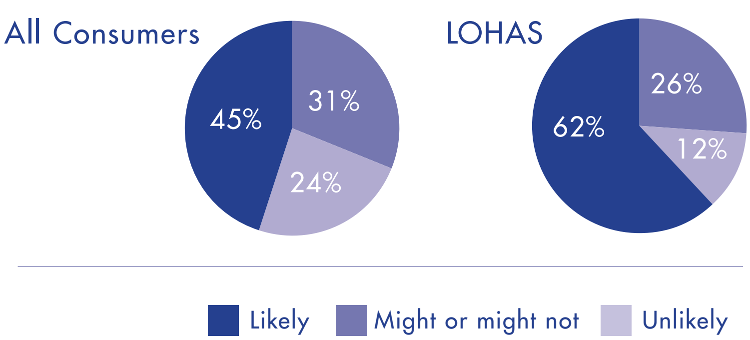
PRICE: LIKELY TO PAY MORE FOR PRODUCTS CONTAINING WILD BLUEBERRIES

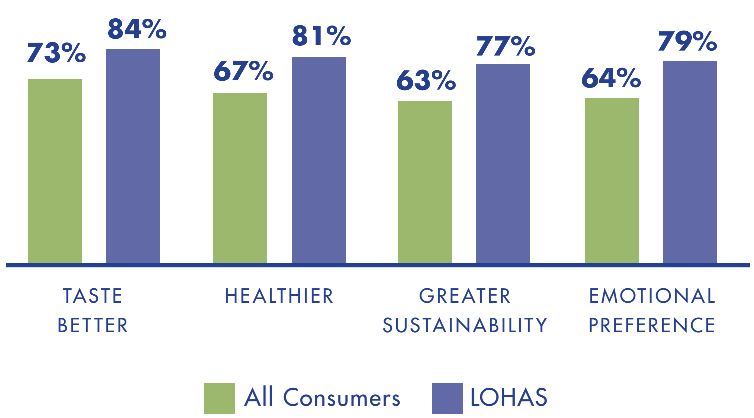


KEY FINDING #4

CONSUMERS BELIEVE WILD BLUEBERRIES MAKE A PRODUCT TASTE BETTER, HEALTHIER, AND MORE SUSTAINABLE, AND THEY FEEL BETTER ABOUT THEMSELVES WHEN EATING IT.

The Wild Blueberry itself sets the expectation for a specific experience that is positive. This expectation adds value to any of the food-product categories tested. The focus-group research implied that this expected added value was rooted in four key areas: "Taste," "Health," "Sustainability," and the more abstract sense that a consumer simply "Feels Better" about him/herself when eating a product with Wild Blueberries. These assumptions were tested against a national audience and proved true for U.S. consumers as a whole.

PERCEIVED BENEFIT OF 'WILD BLUEBERRY' ON A PACKAGE OR MENU



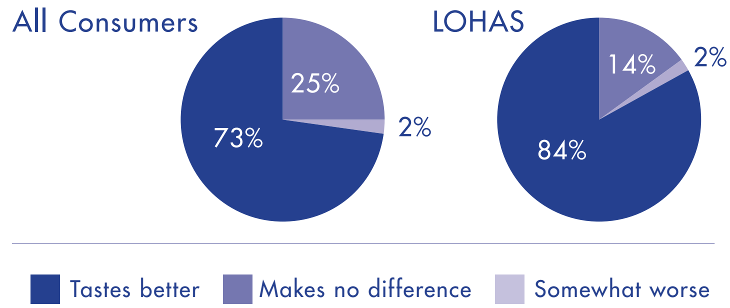
Brands that care about taste and health can leverage the Wild Blueberry to strengthen brand appeal.

IMPACT OF WILD BLUEBERRIES VS. REGULAR BLUEBERRIES ON PACKAGE OR MENU

Taste Better

FLAVOR MATTERS

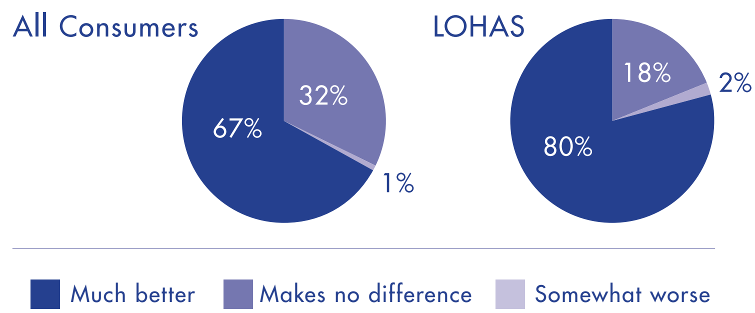
Across all food-product categories tested, an average of three-fourths (73%) of consumers reported that a product made with Wild Blueberries tastes better (84% for LOHAS consumers).



Health Perception

WILD IS BETTER FOR YOU

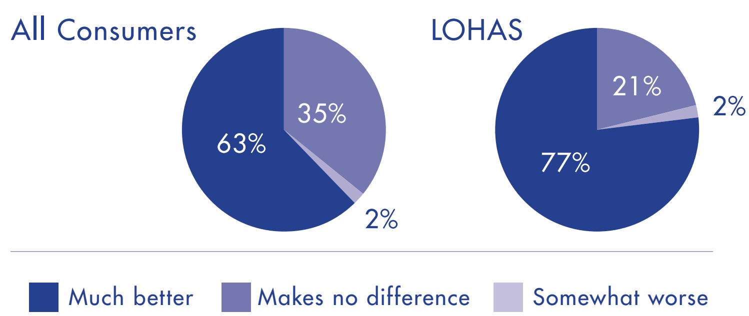
Two-thirds (67%) on average reported that a product made with Wild Blueberries would be healthier (81% for LOHAS).



Sustainability Score

BETTER FOR THE WORLD

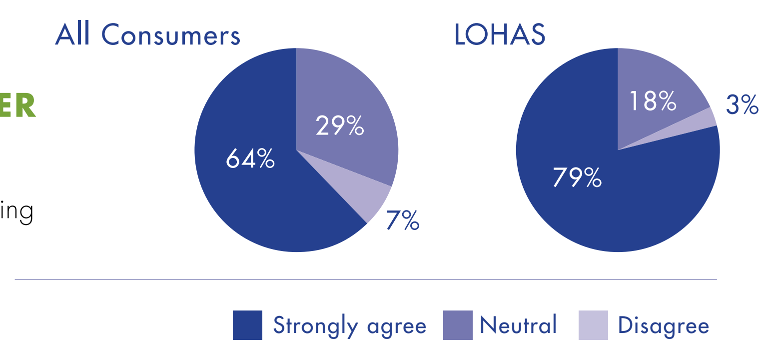
Nearly two-thirds (63%) reported that they believed that products made with Wild Blueberries were more sustainable. (77% for LOHAS).



Emotional Connection

WILD MAKES YOU FEEL BETTER

Two-thirds or 64% of consumers also stated they feel better about themselves when choosing a product containing Wild Blueberries vs. cultivated blueberries when averaged across product categories (79% for LOHAS).



KEY FINDING #5

LOHAS BRANDS ARE BEST POSITIONED TO LEVERAGE 'THE POWER OF WILD'

While the research showed all consumers respond well to the inclusion of Wild Blueberries, LOHAS consumers demonstrated the greatest preference for products containing Wild Blueberries. Purchase likelihood was as strong as it was for the general consumer, but LOHAS consumers were more likely to report that they'd buy more of a product with Wild Blueberries, averaging 25 or more percentage points higher than non-LOHAS consumers at the food-category level.

LOHAS consumers reported that they would pay more for a product containing Wild Blueberries, at a rate averaging 27 or more points higher than non-LOHAS consumers across food categories. This aligns with the focus-group findings that wild foods represent foods in their purest form, unprocessed, and unaltered. These values get to the heart of LOHAS consumers' purchase drivers. It's clear from the national survey research that these findings are true for LOHAS consumers as a whole and are primary drivers of why Wild Blueberry products do, or would do, so well.

Can wild ingredients reduce LOHAS guilt?

The quantitative research also provided insight into comments in the focus groups relating to the fact that consumers feel good about themselves when they feel good about the food they're eating. If selecting a food from a more-indulgent and less health-driven category,

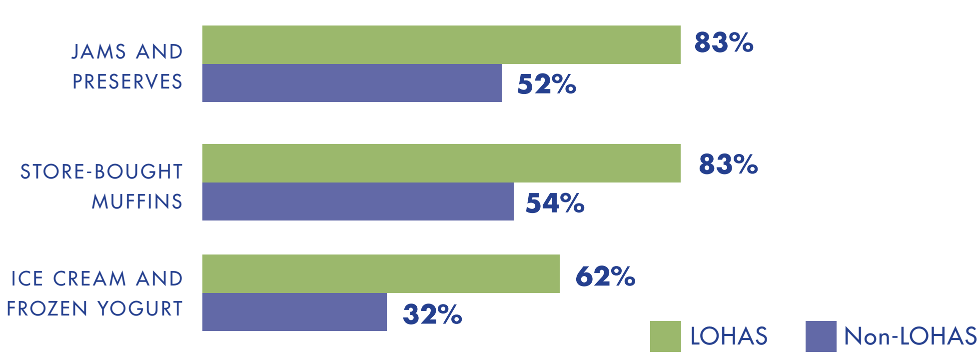
LOHAS Love Wild

Brands targeting the LOHAS consumer are in a unique position to leverage "the power of wild" by adopting or more heavily promoting their use of wild blueberries on their package or menu.

Wild Blueberries make these foods far more appealing to a LOHAS consumer. We see upwards of a 30 percentage point differences between LOHAS and non-LOHAS consumers in the "feel better about" territory when Wild Blueberries are the ingredient called out in Jams/Preserves (83% LOHAS vs. 52% non-LOHAS, Store-Bought Muffins (83% vs 54%) and Ice Cream/Frozen Yogurt (62% vs. 34%).

EMOTIONAL CONNECTION:

LOHAS FEEL BETTER CHOOSING PRODUCTS CONTAINING WILD BLUEBERRIES



CONCLUSIONS:
THE WILD OPPORTUNITY

The research proves the link between "wild foods" and the consumer trend toward greater access to real or whole foods. The cachet of the Wild Blueberry as the essence of the real or whole foods movement is supported by all phases of the research but most directly seen when placed in the context of specific food-product categories and related brands. Consumers believe brands that include Wild Blueberries as an ingredient are closer to and more in line with the desire for real or whole foods than products that contain cultivated blueberries.

This results in a number of commercially desirable changes in behavior where consumers report a greater interest in purchasing the product with Wild Blueberries vs. the cultivated blueberry alternative. They report they'll buy more and pay more. This is rooted in the expectation that the Wild Blueberry option will taste better, be better for you, and is simply a more responsible choice vs. a cultivated blueberry product.

These drivers also cross over from the practical to the personal. Consumers feel better about themselves when they feel good about the foods they eat. They feel good about choosing products with Wild Blueberries more often than those containing just cultivated blueberries.

While this is true across consumer groups, nowhere is it more so than with the LOHAS consumers who put health and sustainability at the forefront of their purchase consideration mindset. Brands that are pursuing this consumer segment will see greater returns by adopting and highlighting the inclusion of Wild Blueberries in their products.

QUESTIONS?

To learn more about the research methodology or for more information about Wild Blueberries, contact: **wbresearch@wildblueberries.com**.

Differentiate with Wild

The consumer research demonstrates that Wild foods are considered closer to nature and Wild ingredients support the attributes today's "Real Food" consumers are looking for in the products they buy. Simply selecting and calling out Wild Blueberries vs. regular blueberries as a key ingredient positively impacts consumer purchase behavior and perceptions of taste, health, and sustainability.

ACKNOWLEDGEMENTS

This research was conducted by Portland Marketing Analytics and was funded by the Wild Blueberry Association of North America.

DISCLAIMER

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APPENDIX: FOOD-SPECIFIC RESULTS FOR EACH CATEGORY

Respondents were shown two identical product offerings from each category—except one is made with Wild Blueberries and one with regular blueberries.

Purchase Preference: Wild Blueberries vs. Blueberries

Consumers are more apt to buy foods with Wild Blueberries vs. regular blueberries in every category tested.

Q: Assuming these two products are the same price, which would you, or someone like you, be more likely to buy?

Purchase Preference-Specific Category Data	More Likely to Buy Product with Wild Blueberries	More Likely to Buy Product with regular blueberries
Store-Bought Smoothie		
All Consumer	69%	31%
LOHAS	67%	33%
Prepared Smoothies		
All Consumers	66%	34%
LOHAS	62%	38%
Jams/Preserves		
All Consumers	64%	36%
LOHAS	62%	38%
Muffin Mix		
All Consumers	63%	37%
LOHAS	64%	36%
Prepared Muffins		
All Consumers	62%	38%
LOHAS	56%	44%
Store-Bought Muffins		
All Consumers	59%	41%
LOHAS	58%	42%
Yogurt		
All Consumers	52%	48%
LOHAS	56%	44%
Ice Cream/ Frozen Yogurt		
All Consumers	54%	46%
LOHAS	53%	47%

Purchase Volume

Respondents are willing to buy more when products contain Wild Blueberries.

A higher percentage of LOHAS consumers are more likely to buy more if food products contain Wild Blueberries.

Q: If more (name of product category) were made with Wild Blueberries, how likely would you be to (Buy More)?

On Buy More-Specific Category Data	Extremely Likely/ Somewhat Likely	Might Or Might Not	Somewhat Unlikely/ Extremely Unlikely
Store-Bought Smoothie			
All Consumer	73%	20%	7%
LOHAS	82%	17%	1%
Prepared Smoothies			
All Consumers	70%	22%	8%
LOHAS	80%	16%	4%
Jams/Preserves			
All Consumers	47%	34%	19%
LOHAS	66%	21%	13%
Muffin Mix			
All Consumers	66%	32%	2%
LOHAS	79%	19%	2%
Prepared Muffins			
All Consumers	55%	31%	14%
LOHAS	75%	18%	7%
Store-Bought Muffins			
All Consumers	53%	33%	14%
LOHAS	73%	23%	4%
Yogurt			
All Consumers	44%	37%	19%
LOHAS	62%	28%	10%
Ice Cream/ Frozen Yogurt			
All Consumers	35%	40%	25%
LOHAS	53%	32%	15%

Purchase Price

Respondents are willing to pay a premium when products contain Wild Blueberries.

A higher percentage of LOHAS consumers are likely to pay more for food products that contain Wild Blueberries.

Q: If more (name of product category) were made with Wild Blueberries, how likely would you be to (Pay a Bit More)?

On Pay More-Specific Category Data	Extremely Likely/ Somewhat Likely	Might or Might Not	Somewhat Unlikely/ Extremely Unlikely
Store-Bought Smoothie			
All Consumer	63%	26%	11%
LOHAS	72%	22%	6%
Prepared Smoothies			
All Consumers	65%	22%	13%
LOHAS	72%	20%	8%
Jams/Preserves			
All Consumers	38%	34%	28%
LOHAS	60%	26%	14%
Muffin Mix			
All Consumers	51%	29%	20%
LOHAS	67%	24%	9%
Prepared Muffins			
All Consumers	47%	32%	21%
LOHAS	62%	31%	7%
Store-Bought Muffins			
All Consumers	39%	34%	27%
LOHAS	57%	31%	12%
Yogurt			
All Consumers	30%	35%	35%
LOHAS	54%	28%	18%
Ice Cream/ Frozen Yogurt			
All Consumers	27%	34%	39%
LOHAS	51%	28%	21%

Taste

Taste expectations for every product benefits from Wild Blueberries.

For LOHAS consumers, more than 8 out of 10 believe Wild Blueberries improve blueberry taste in food products.

Q: To what extent do you feel each of the following attributes of _________ benefit from the inclusion of wild blueberries, if at all? (Better Blueberry Taste)

On Taste-Specific Category Data	Much Better or Somewhat Better	Makes No Difference	Somewhat Worse or Much Worse
Store-Bought Smoothie			
All Consumer	85%	14%	1%
LOHAS	87%	13%	0%
Prepared Smoothies			
All Consumers	85%	14%	1%
LOHAS	90%	9%	1%
Jams/Preserves			
All Consumers	71%	27%	2%
LOHAS	83%	15%	2%
Muffin Mix			
All Consumers	74%	24%	2%
LOHAS	84%	14%	2%
Prepared Muffins			
All Consumers	76%	21%	3%
LOHAS	84%	12%	4%
Store-Bought Muffins			
All Consumers	70%	27%	3%
LOHAS	82%	16%	2%
Yogurt			
All Consumers	67%	32%	1%
LOHAS	80%	18%	2%
Ice Cream/ Frozen Yogurt			
All Consumers	60%	38%	2%
LOHAS	80%	19%	1%

Health

Wild Blueberries are thought to increase health benefits of all products.

Nearly 8 out of 10 LOHAS respondents agree that Wild Blueberries provide better health benefits to all food categories tested.

Q: To what extent do you feel each of the following attributes of _________ benefit from the inclusion of wild blueberries, if at all? (Health)

On Health-Specific Category Data	Much Better or Somewhat Better	Makes No Difference	Somewhat Worse or Much Worse
Store-Bought Smoothie			
All Consumer	80%	18%	2%
LOHAS	84%	16%	0%
Prepared Smoothies			
All Consumers	81%	17%	2%
LOHAS	87%	13%	0%
Jams/Preserves			
All Consumers	62%	37%	1%
LOHAS	81%	18%	1%
Muffin Mix			
All Consumers	66%	33%	1%
LOHAS	82%	17%	1%
Prepared Muffins			
All Consumers	67%	31%	2%
LOHAS	76%	20%	4%
Store-Bought Muffins			
All Consumers	61%	38%	1%
LOHAS	74%	25%	1%
Yogurt			
All Consumers	65%	34%	1%
LOHAS	82%	17%	1%
Ice Cream/ Frozen Yogurt			
All Consumers	54%	45%	1%
LOHAS	73%	25%	2%

Sustainability

Products containing and calling out Wild Blueberries better support sustainability.

For LOHAS consumers, Wild Blueberries add significant value to a brands perceived commitment to sustainability.

Q: To what extent do you feel each of the following attributes of _________ benefit from the inclusion of wild blueberries, if at all? (Supports Sustainability)

On Sustainability-Specific Category Data	Much Better or Somewhat Better	Makes No Difference	Somewhat Worse or Much Worse
Store-Bought Smoothie			
All Consumer	77%	22%	1%
LOHAS	84%	16%	0%
Prepared Smoothies			
All Consumers	77%	21%	2%
LOHAS	79%	19%	2%
Jams/Preserves			
All Consumers	52%	46%	2%
LOHAS	72%	25%	3%
Muffin Mix			
All Consumers	66%	32%	2%
LOHAS	79%	19%	2%
Prepared Muffins			
All Consumers	65%	34%	1%
LOHAS	79%	18%	3%
Store-Bought Muffins			
All Consumers	61%	37%	2%
LOHAS	77%	22%	1%
Yogurt			
All Consumers	54%	44%	1%
LOHAS	73%	25%	2%
Ice Cream/ Frozen Yogurt			
All Consumers	47%	51%	2%
LOHAS	71%	27%	2%

Emotional Connection

Products with Wild Blueberries generate positive feelings.

Positive response to Wild Blueberries in products is even more pronounced with LOHAS consumers.

Please provide your level of agreement with the following statement:

Q: "I feel good when I choose _________ with Wild Blueberries in it."

On Emotional Connection-Specific Category Data	Strongly Agree or Somewhat Agree	Neutral	Somewhat Disagree or Strongly Disagree
Store-Bought Smoothie			
All Consumer	79%	19%	2%
LOHAS	89%	11%	0%
Prepared Smoothies			
All Consumers	78%	20%	2%
LOHAS	83%	16%	1%
Jams/Preserves			
All Consumers	61%	32%	7%
LOHAS	82%	14%	4%
Muffin Mix			
All Consumers	67%	29%	4%
LOHAS	81%	18%	1%
Prepared Muffins			
All Consumers	67%	29%	4%
LOHAS	81%	16%	3%
Store-Bought Muffins			
All Consumers	63%	32%	5%
LOHAS	82%	16%	2%
Yogurt			
All Consumers	54%	38%	8%
LOHAS	71%	23%	6%
Ice Cream/ Frozen Yogurt			
All Consumers	42%	46%	12%
LOHAS	62%	33%	5%