



Consumer Path to Purchase Fresh Apples

Blind Taste Test Study 2020

Project Overview

2020 Blind Taste Test Study to gain insights in the consumer path of purchasing apples conducted by Leede Research and ChurchillGroup Research. Panelists included 23 female, primary shoppers (age 31-52) who purchase apples once a month or more and have at least one child at home with \$50k+ HHI. Apples tested: Pazazz, Cosmic Crisp, Sweetango, Envy, Autumn Glory, SugarBee, Honeycrisp, Gala, Pink Lady.

Overall Apple Consumer Trends

The original grab-and-go healthy snacks are still the top fruit purchased at retail in the U.S. capturing \$4.3B in shopper spend annually. **Honeycrisp is ranked #1 in the US.**

An apple a day costs the shopper \$4.00 per week on average, shoppers opting for the #1 variety mentioned or organic assortments are paying 1.5x's more.*

*Source: US Apple Org, Freshlook IRI



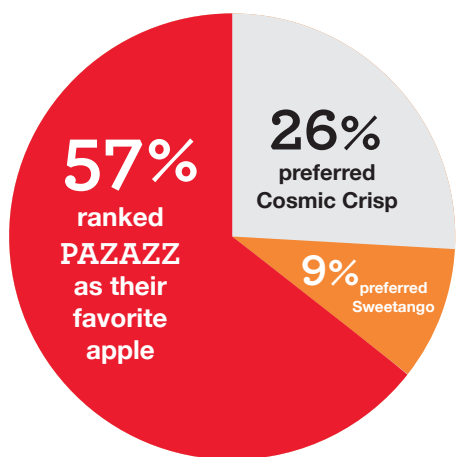
Leede Research is a full-service marketing research firm that delivers qualitative and quantitative insights that are enlightening, accurate, and actionable. Based in Minneapolis, MN.



ChurchillGroup based in New Canaan, CT conducts and delivers qualitative research and moderated focus groups with a journalistic approach and creative interviewing approaches.

Consumer Panel Findings

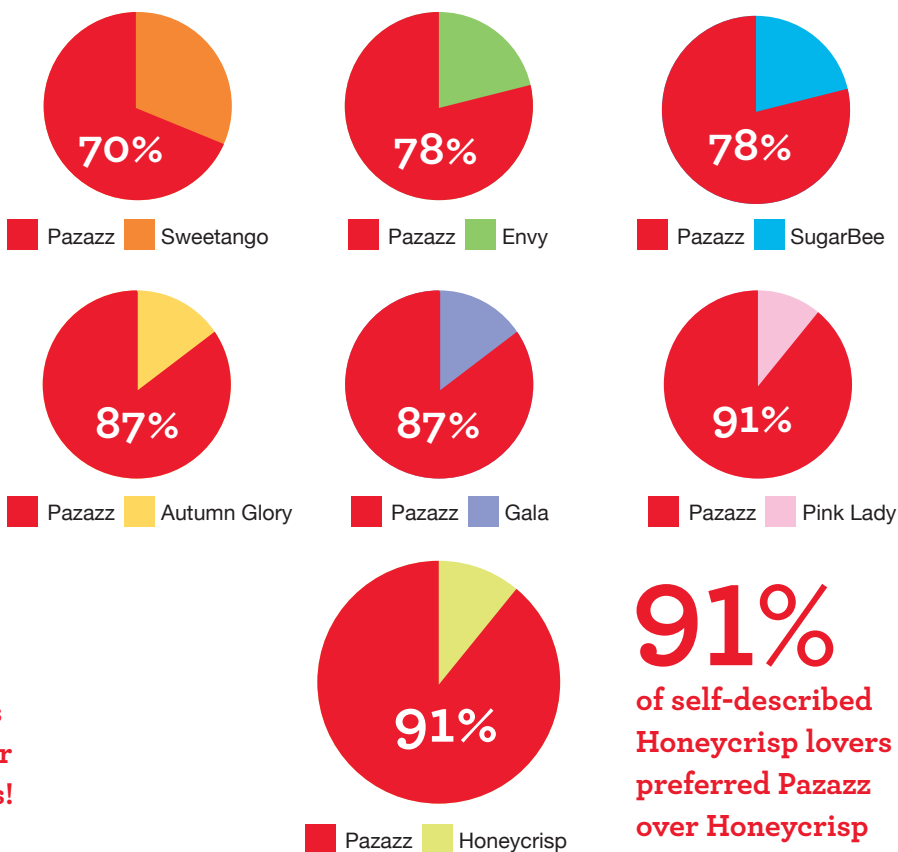
Consumer taste testing study of Honeycrisp lovers was conducted by a third party research organization in January 2020. Pazazz was the hands down favorite.



70% of taste test panelists ranked Pazazz in their TOP 2 favorite apples!

Head to Head Comparisons

Respondents preferred the overall taste of Pazazz vs. seven competitor apples.



91% of self-described Honeycrisp lovers preferred Pazazz over Honeycrisp

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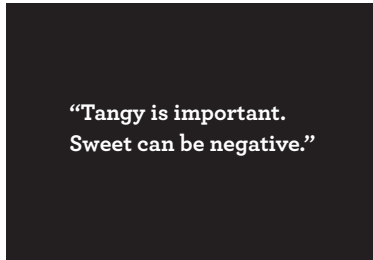
What consumers in this study said about Pazazz apples...

- “Intense Pop!”
- “Perfectly tangy and sweet.”
- “Everything about it caught my eye.”
- “Lightens up my taste buds.”
- “Party in my mouth.”
- “Bold flavor and colors.”
- “Name conveys FUN.”
- “Front-end flavor.”
- “Complex, Vibrant.”

Comments from respondents



“Pazazz’s flavor is interesting and dynamic...really complex... would want to eat a whole apple...tart and tangy...just acidic enough.”



“Tangy is important. Sweet can be negative.”



Interview #23 Elicia P.



Interview #21 Amy L.

“Pazazz is the complete package...crunchy, juicy, and flavor that’s little more tart than the other apples.”

Consumer Sound-Bites & Learnings




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Apple Brand & Variety Awareness

Respondents had a near universal awareness of Honeycrisp, Gala, Pink Lady, and Sweetango. They also said that Honeycrisp is their leading apple variety they purchased. Below is a breakdown of the participants recognition and purchasing history of apple varieties.

	Which of the following varieties of apples have you heard of?	Which of the following varieties of apples have you purchased?	Which of the following varieties of apples do you purchase regularly?	Think about the last time you tried a different variety of apple, what was it?
Autumn Glory	17.4%	8.7%	0%	0%
Cosmic Crisp	4.3%	4.3%	0%	4.3%
Envy	34.7%	13%	0%	4.3%
Gala	95.6%	78.2%	52.2%	4.3%
Honeycrisp	100%	100%	91.3%	21.7%
Pink Lady	95.6%	82.6%	52.2%	4.3%
Pazazz	52.1%	30.4%	4.3%	4.3%
SugarBee	17.4%	8.7%	0%	4.3%
SweetTango	95.6%	47.8%	8.7%	30.4%

Multiple factors play a role in trial of new apple varieties

4.3%	Word of mouth recommendation from store product manager	30.4%	Heard about variety in media (Food Network, online, etc)
8.7%	Discount coupon	39.1%	In-store tasting
17.4%	Other: Freebie at work, at orchard, newspaper ad, recipe	43.5%	Special promotional price/sale
30.4%	Point-of-Sale signage	47.8%	Word of mouth recommendation from friend

