

**Consumer Survey and Focus Groups
September / October 2005**

Summary of Key Findings



California Table Grape Commission

In 2005, the California Table Grape Commission asked Fleishman-Hillard Research to assess consumer attitudes on a range of grape quality and consumer preference issues. Fleishman-Hillard obtained feedback during September and October 2005 through (1) self-administered Web-based surveys with U.S. (1,022) and Canadian (506) household shoppers and (2) in-depth consumer focus groups with 33 shoppers in San Francisco, St. Louis, and Boston.

1. Consumer Opinions About Grape Shatter

Overall, consumers do not perceive fresh grapes to be of poor quality if grapes are detached from the stem.

Overall, household shoppers are aware that grapes detach from the stem. For most, it's a natural occurrence that doesn't affect their shopping habits. A majority of respondents still eat detached grapes. There is, however, a small proportion of the population that expresses concern about purchasing and consuming fresh grapes that have fallen off the stem.

DETAILED FINDINGS 1. GRAPE SHATTER

UNAIDED CONSUMER AWARENESS

When asked to think about how fresh grapes are displayed or packaged, some (but relatively few) survey participants volunteered comments about fresh grapes being detached from the stem.

- ◆ Overall, one shopper out of 20 made a comment (either positive or negative) about fresh grapes being detached from the stem (5%).

In the focus group discussions, conducted in San Francisco, St. Louis, and Boston (between October 5 and October 20, 2005), participants were given a bag of fresh green grapes and asked to empty the bag onto a plate and examine them. (Within each discussion group, the moderator intentionally prepared the individual bags of grapes so that a few them had 30% shatter, several had no or only 3% shatter, and the others had either 7% or 10% shatter. This made it possible for the participants to see varying levels of shatter at the same table.)

AIDED CONSUMER AWARENESS

Overall, consumers do not perceive fresh grapes to be of poor quality if grapes are detached from the stem.

In the survey and focus groups, shoppers were shown several different pictures of grapes with varying levels of shatter (3%, 7% or 10%, and 30%) and asked to evaluate the quality of the grapes. In the survey, half of the sample saw shatter levels of 3%, 7%, and 30% and the other half of the survey sample saw shatter levels of 3%, 10% and 30%. In the survey (and the focus groups), the photos were shown in the following order: 30%, 3%, 7% and/or 10%.

- ◆ Almost nine out of 10 U.S. and Canadian shoppers rated grapes showing a little shatter (3%) as “excellent/very good/good” (88%).
- ◆ Overall, little or no difference exists between grapes showing some shatter (7%) and grapes showing slightly more shatter (10%). Overall, four-fifths (81%) of U.S. and Canadian shoppers rated grapes showing some shatter as “excellent/very good/good,” and the same proportion (82%) rated grapes showing more shatter (10%) as “excellent/very good/good.” However, a closer review of the country-specific results reveals an anomaly in the data: U.S. shoppers assign higher quality ratings to the 10% shatter photo than the 7% shatter photo (a difference of seven percentage points – statistically significant at the 95 percent confidence level); in contrast, those in Canada assign higher quality ratings, as one might expect to the 7% photo rather than the 10% photo (a difference of 11 percentage points – statistically significant at the 95 percent confidence level). While this anomaly cannot be readily explained, the findings do suggest that consumers’ perceptions of fresh grape quality does not differ much at 7% shatter versus 10% shatter.
- ◆ Approximately two-thirds of consumers rated grapes with the most shatter (30%) as “excellent/very good/good” (68%).
- ◆ In the focus group discussions, participants saw no difference among grapes with 3%, 7% and 10% shatter. Participants said they would purchase the grapes displayed in all three pictures.

When purchasing fresh grapes, almost all consumers have experienced shatter (98%).

This finding is from the survey, and it has a sampling error of plus or minus three percentage points at the 95 percent confidence level. A focus group participant described her experience in this way:

When I buy them (grapes) at the store and take them home, there usually aren't that many that have fallen off. (San Francisco)

Among those who have purchased fresh grapes that have shattered acknowledge that they have eaten those grapes that detached from the stem (87%).

- ◆ More specifically, almost half of these consumers (especially those in the U.S.) report that they store the detached grapes in the same container with the other grapes and eat them later (47%; 52% in the U.S. versus 36% in Canada).
- ◆ Two out of five shoppers eat detached fresh grapes immediately before storing the remaining grapes in the refrigerator (40%), especially those in Canada (49% versus only 36% of U.S. shoppers).

I eat them when I'm putting the rest away. (San Francisco)

I don't worry much about it because we eat them so fast. (St. Louis)

- ◆ Only 6% of U.S. and Canadian shoppers say they throw away fresh grapes that are detached from the stem.

I don't mind them. If they're hard, I'll take them, if they're good grapes. (Boston)