

IFCO

Shopper Produce Display Preferences Survey Results



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Executive Summary: Background and Goals

IFCO has worked both independently and in collaboration with our strategic retail partners to develop merchandising solutions for use with reusable plastic containers (RPCs). IFCO conducted primary research of US grocery shoppers in order to inform the development of these solutions and provide actionable insight.

The goals of this research were to:

- Identify shopper preferences between produce displays using corrugated boxes and reusable plastic containers
- Identify the impact, if any, of the type of display-ready container used for display and shopper perceptions of produce freshness, quality, and value
- To identify the impact, if any, of shopper demographics on their perception of produce displays

Executive Summary: Sample and Questionnaire Design

- We used an online survey for this project with a **total sample of 201**, which provides a margin of error of 7% at the desired 95% confidence level*
- The sample was composed of US adults (18+ years of age) who identified themselves as the primary grocery shoppers in their households
- The sample was taken primarily from seven major metropolitan markets:
 - Atlanta, GA
 - Dallas, TX
 - Indianapolis, IN
 - Los Angeles, CA
 - Phoenix, AZ
 - Portland, OR
 - Washington DC

* We can be 95% certain that results from the general population would be the same as those from the sample +/- 7%

Executive Summary: Results

Respondents overwhelmingly prefer produce displayed in RPCs to produce displayed in corrugated boxes

Shoppers perceive produce displayed in RPCs to be fresher, higher quality

- 76% say RPC displays are more attractive
- 60% think produce displayed in RPCs appears fresher (25% - no difference)
- 61% think produce displayed in RPCs appears of higher quality (27% - no difference)
- 51% said they would pay more for produce displayed in RPCs (39% - no difference)
- 68% said they would prefer to shop RPC displays (18% had no preference)

Executive Summary: Results

When asked “Why do you prefer [your preferred] display?”, respondents who preferred RPC displays frequently mentioned the display container specifically as the reason for their preference, while respondents who preferred corrugated displays only rarely cited the boxes themselves as the reason for their preference.

The most frequent adjectives used to describe the RPC displays and produce in them were variations of: clean, organized, neat, and fresh

Analysis and Recommendations

Tell shoppers that RPCs are shipped directly from the farm

RPC displays indicate to shoppers that the retailer has made an effort to arrange their produce in an attractive manner, and this additional care transfers to perceptions of quality:

- “Looks like all has been inspected before putting on the shelf”
- “Looks like it has been well treated and put out to look nice”
- “A little more organized, a little more care, looks cleaner”

Conversely, those respondents who prefer to purchase produce directly out of corrugated boxes do so because they perceive that this produce has been handled less:

- “Produce in crates would have produce dumped in, in box, just appears fresher”
- “LOOKS LIKE IT JUST CAME OFF THE TRUCK”
- “It is in boxes that it was delivered in and therefore have less handling”

Thus, the positive message corrugated boxes send to shoppers is that produce has sustained less handling, but the overall look of such a display is regarded as “garbage” or “cheap”. As RPCs send the opposite messages, there appears to be a significant opportunity to marry the two positive perceptions by telling shoppers that RPCs are shipped directly from the farm.

Analysis and Recommendations

Tell shoppers why you use RPCs

Several respondents demonstrated knowledge of the factors that lead to produce freshness and quality, as well as the impact of packaging on these factors (all comments are from respondents who prefer RPCs):

- “It will also be maintained at the proper temperature”
- “Plastic bins with slots on sides allow for air circulation and are more attractive than cardboard boxes. Boxes also encourage insects and rotting of produce on the bottom layers”
- “Black plastic crates are more appealing and allow air to reach produce and protect from spoilage”

Thus, it appears that shoppers would understand the benefits of RPCs *to themselves* if explained, and would therefore see the RPCs on the floor and know that they were shopping the highest quality produce.

Additionally, although we did not address the issue in this research, consumer awareness of environmental issues has been well documented, and additional opportunity exists to explain the environmental benefits of RPCs to shoppers.

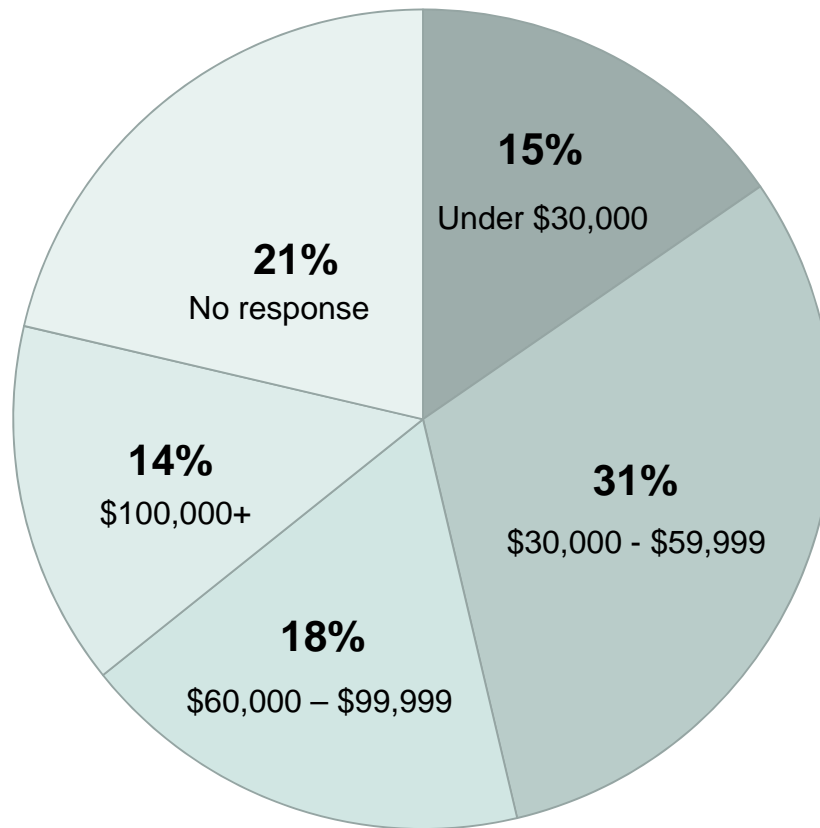
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Respondent Demographics

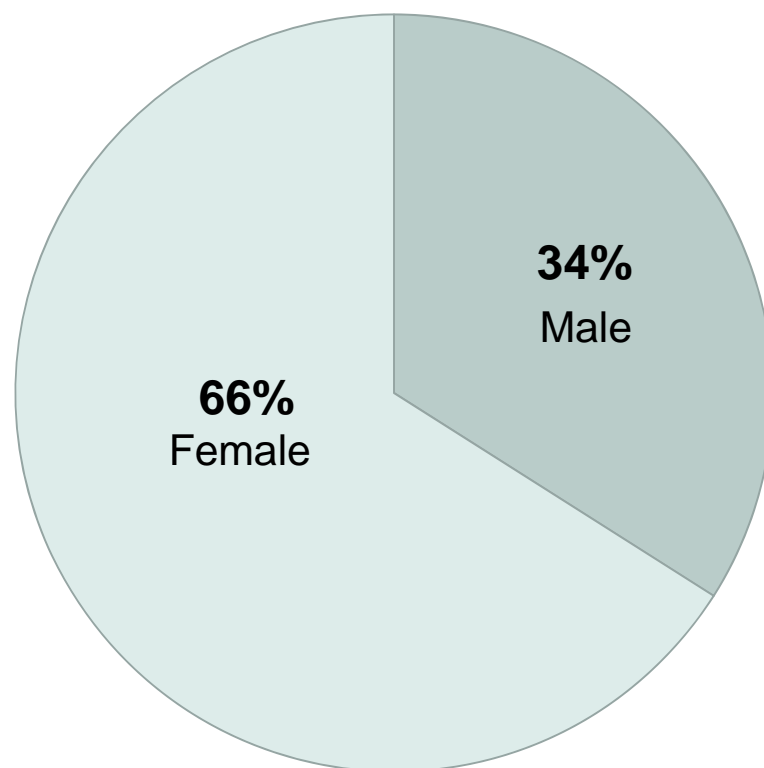


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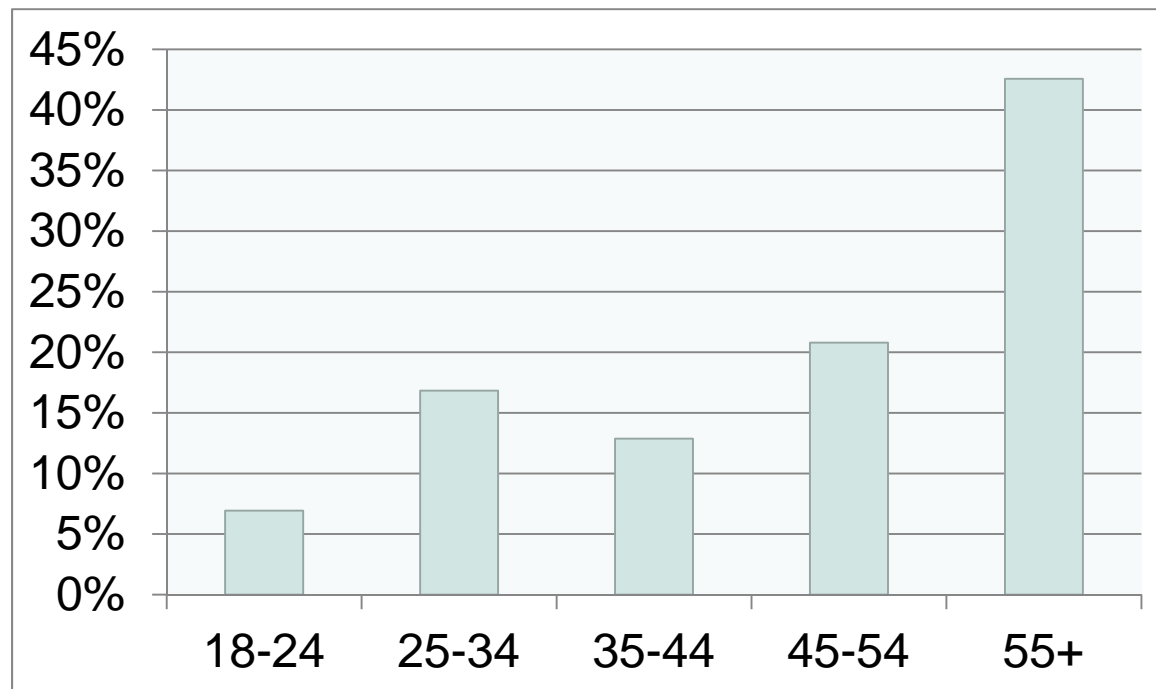
Household Income



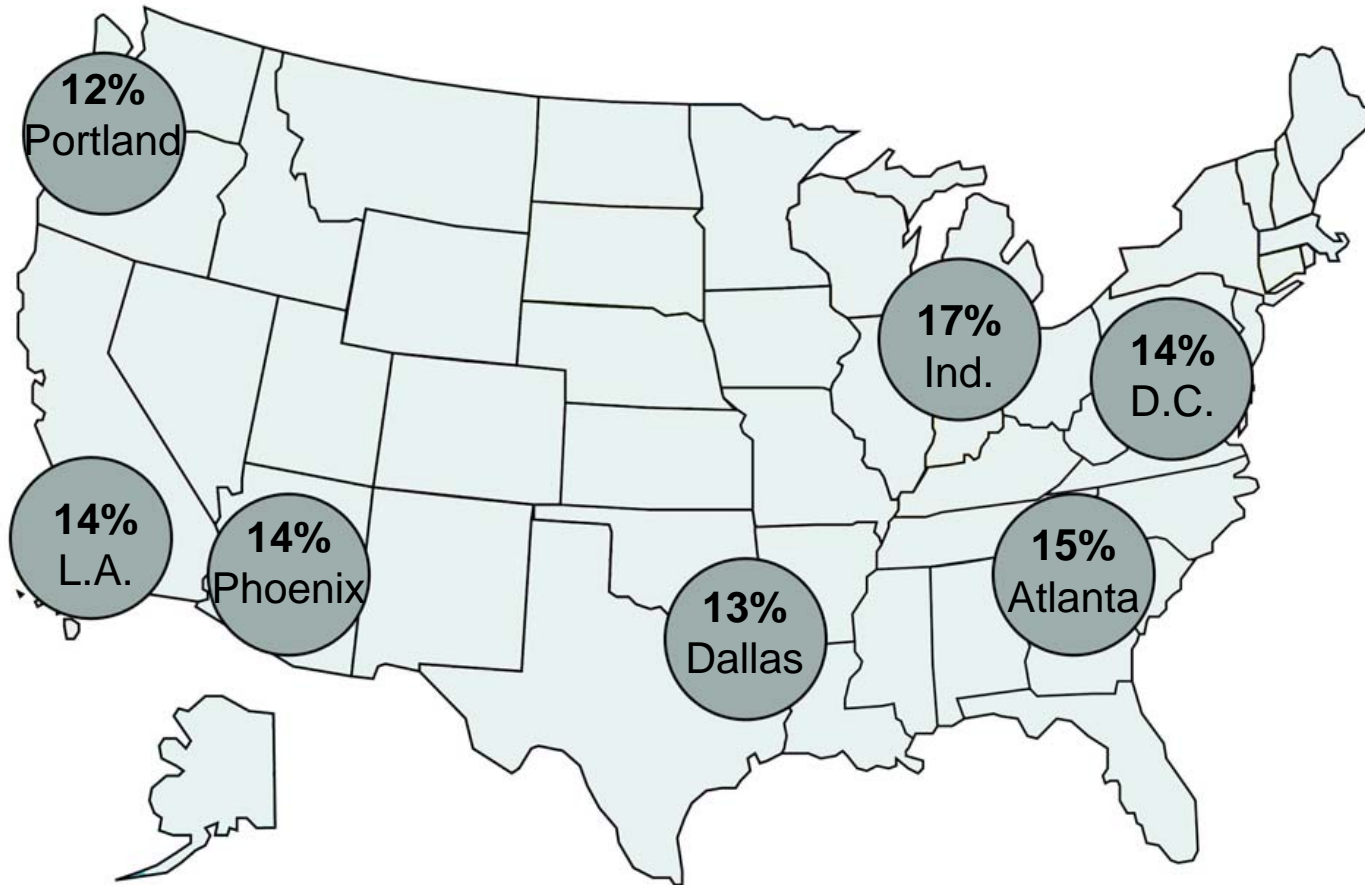
Gender



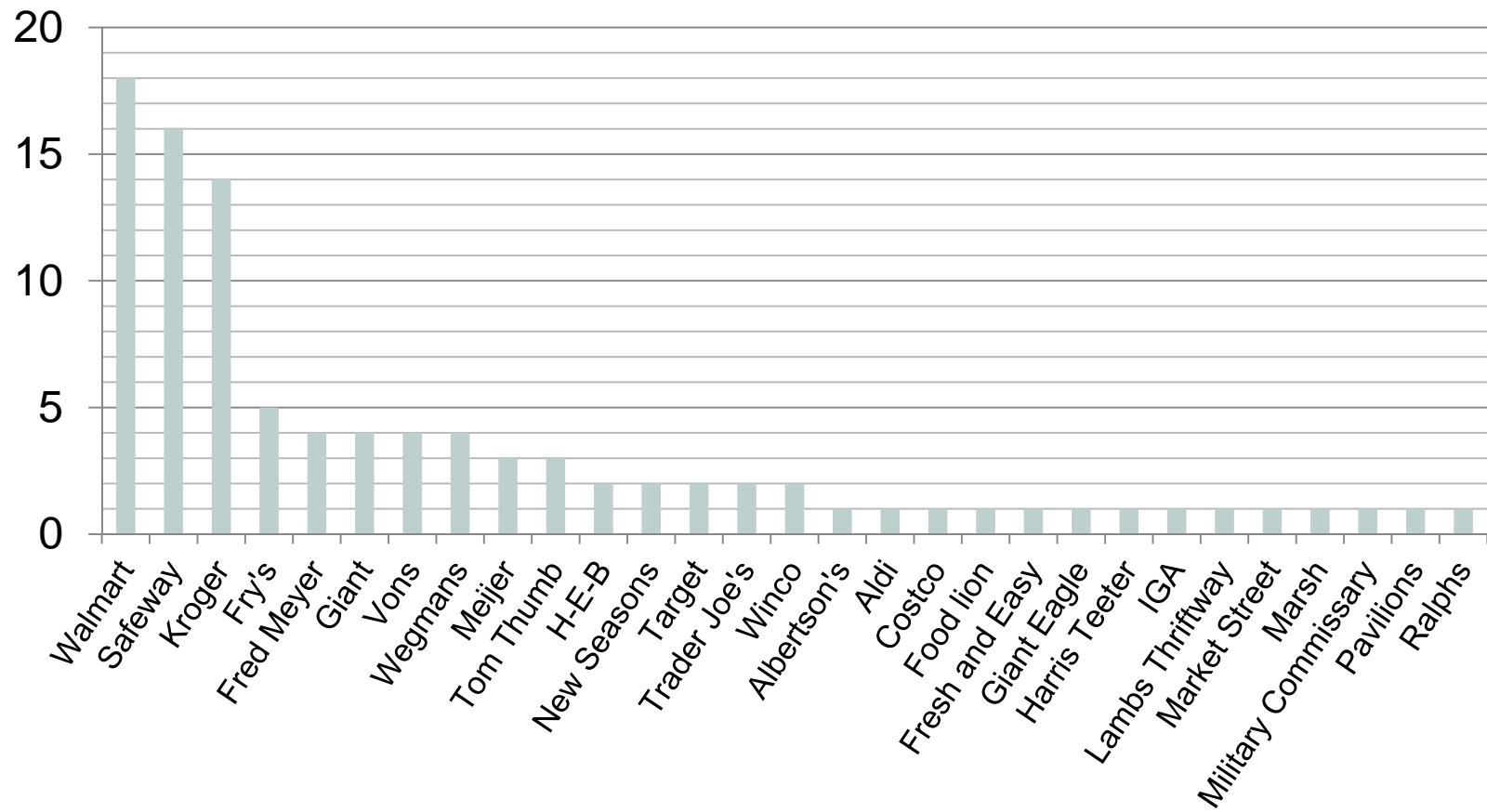
Age



Metro Area



Primary Grocery Store



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Responses: Summary

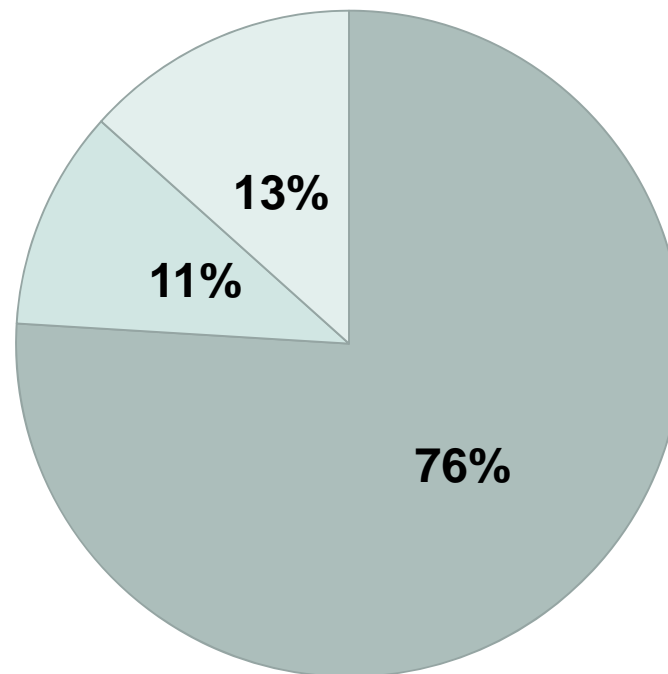


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Responses: Summary

Which display is the most attractive?

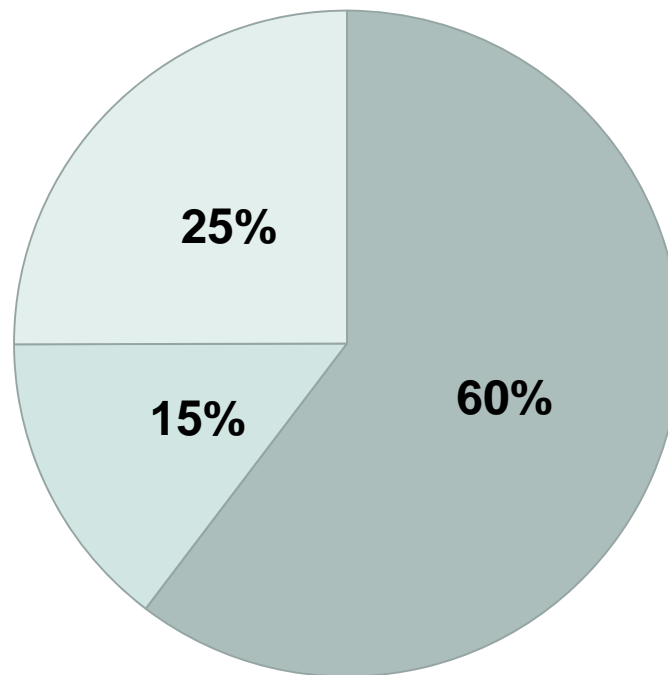
■ RPC ■ Corrugated ■ No difference



Responses: Summary

Which one appears to have the freshest produce?

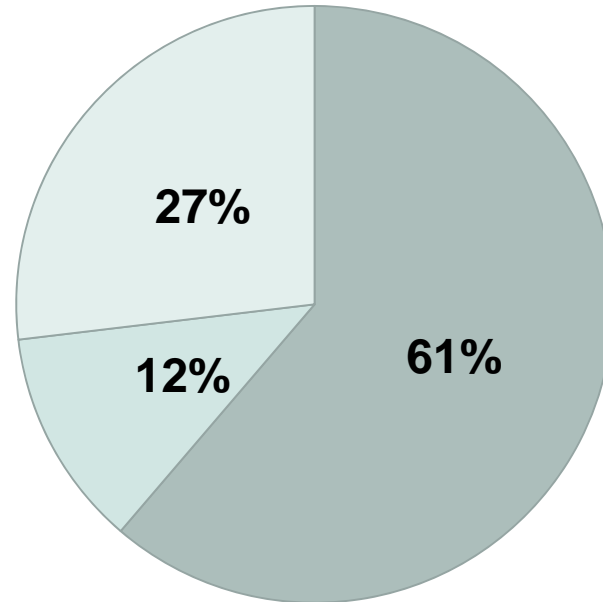
■ RPC ■ Corrugated ■ No difference



Responses: Summary

Which one appears to have the highest quality produce?

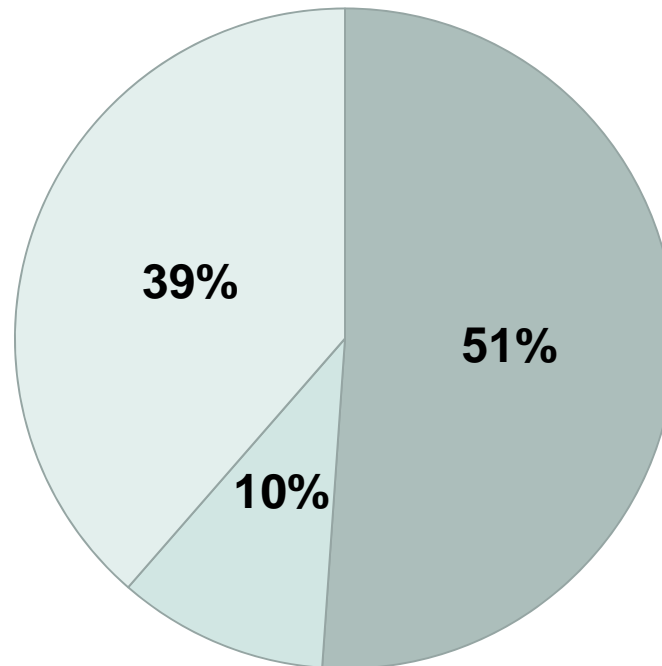
■ RPC ■ Corrugated ■ No difference



Responses: Summary

Which produce would you be willing to pay more for?

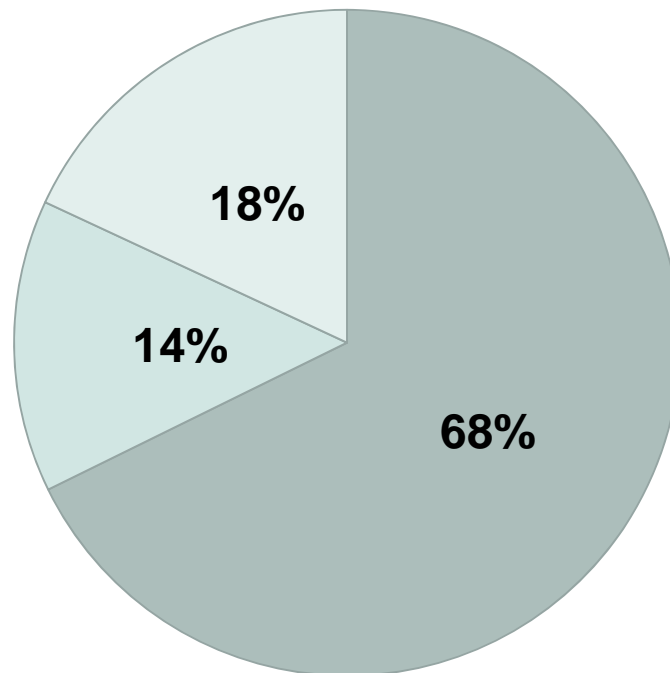
■ RPC ■ Corrugated ■ No difference



Responses: Summary

Overall, from which display would you prefer to shop?

■ RPC ■ Corrugated ■ No difference

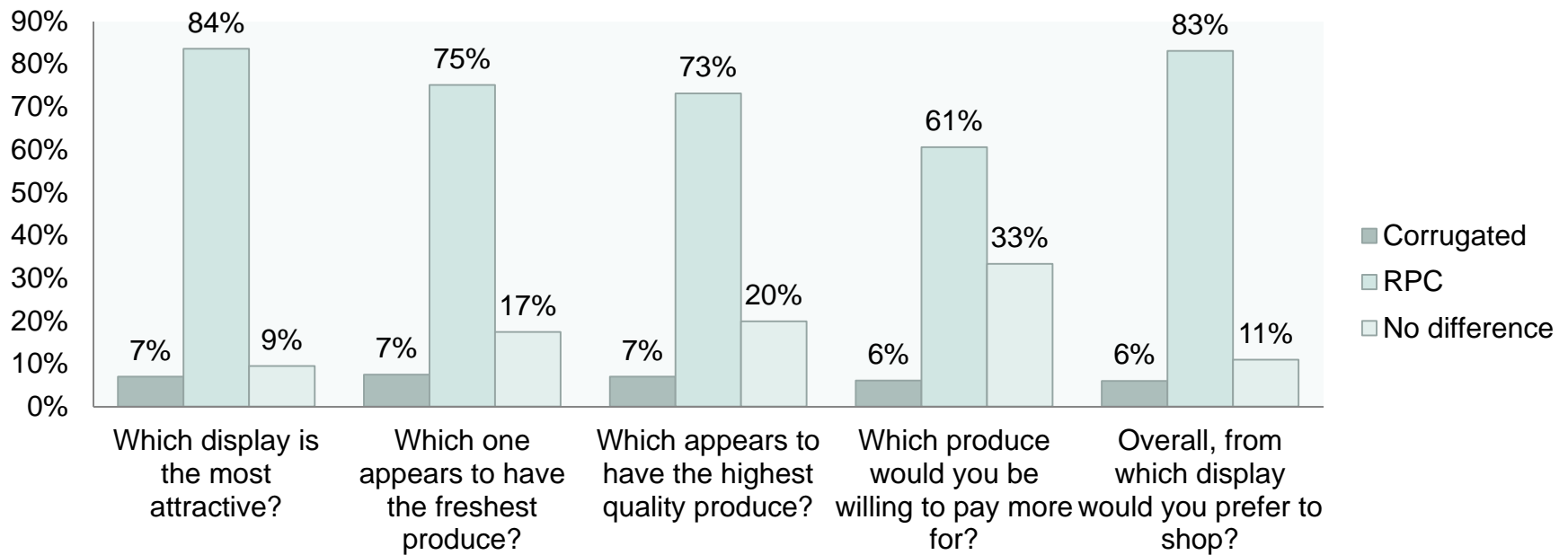


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Responses: By Photo Set



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Why do you prefer this display? (RPC)

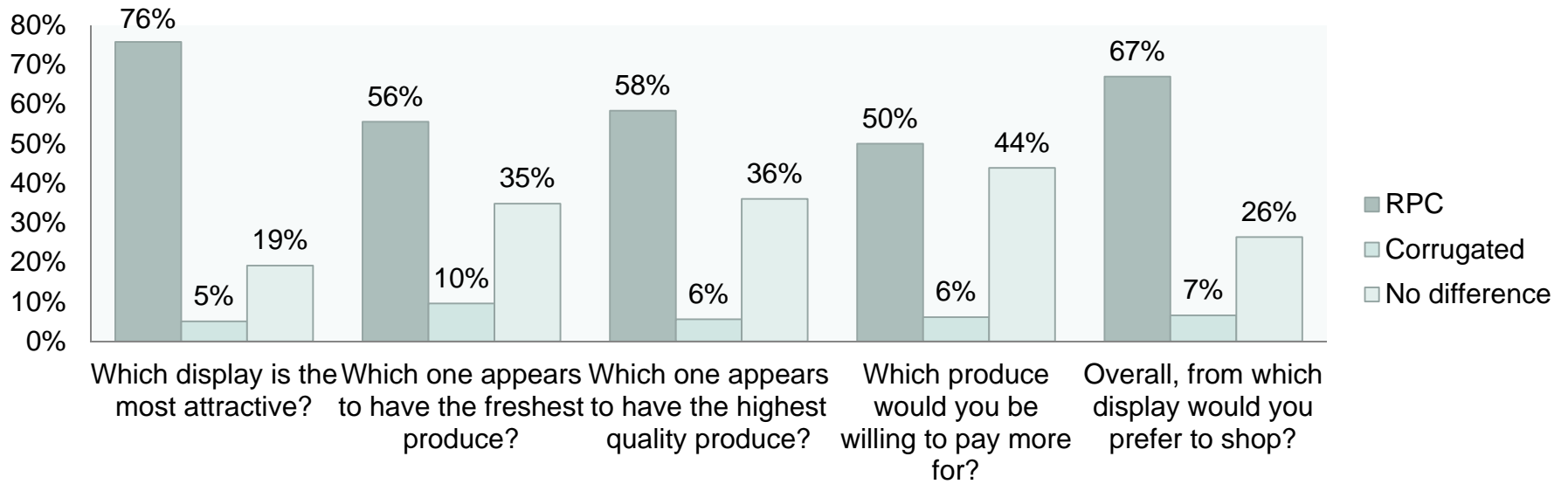
- looks neater
- It looks more organized
- neater display, produce looks fresher
- more uniformed
- Display B seems more organized.
- it is more organized
- The produce stands out more and looks fresher.
- Looks more clean and organized
- again, don't like produce just put out in boxes, lazy & crummy
- It is neat and organized.
- neater looking
- very organized and would be easy to select what you want
- its looks better
- display is better
- looks cleaner
- More organized

Why do you prefer this display? (RPC)

- Looks cleaner
- more organized and clean looking
- Fruit appears to be arranged a little neater, looks fresher
- It clearly displays the produce. It will also be maintained at the proper temperature.
- it looks better
- Organized more uniformly
- neater, looks cleaner
- neater fresher looking
- looks neater-more organized
- Looks neat
- look neater
- I think it is neater, looks cleaner. Looks like they took more time and care in the display
- It is cleaner and more organized.
- it looks neater and is easier to shop.
- fresher looking
- It looks better organized

Why do you prefer this display? (RPC)

- neater looking and easier to see if the produce is fresh
- doesn't have them in cardboard boxes
- more organized
- no bags and no boxes
- don't like look of boxes on Display A
- I like the outlay something that would grab my attention thanks
- The bins are larger/deeper and it seems like the fruit would not roll out of the bins when I make a selection.
- More lined up



Why do you prefer this display? (RPC)

- looks organized
- looks
- Looks more profession
- neater
- organize
- organized better. crates look in better condition than the other one
- It is neatly stocked...
- looks nicer
- its manually put in the bins
- The first display is arranged in open shelves so all produce can be viewed. The second display is arranged in boxes and crates so only a small amount of the produce is visible
- The plastic crates lend themselves to a better look here, cardboard boxes that look like they've seen a few hundred miles don't work as well
- I can see more of the first. This display gives more of a feeling of abundance
- It looks sturdier
- nicer

Why do you prefer this display? (RPC)

- neater
- looks good
- cleaner look
- The boxes aren't falling apart, they are uniform, and the left side food looks fresher
- Display A seems presented better than B.
- it looks better
- It is well organized.
- plastic bins with slots on sides allow for air circulation and are more attractive than cardboard boxes. Boxes also encourage insects and rotting of produce on the bottom layers
- It is more organized and sturdier looking.
- looks better in nicer containers - cardboard boxes look cheap
- cleaner
- best looking
- very neatly stacked on crates that look well organized
- looks cleaner
- better display

Why do you prefer this display? (RPC)

- it looks better than produce boxes, but it's not necessary to transfer the items to plastic bins - it only "looks" better, doesn't mean it is better
- more attractive
- This display looks neater and fresher and is more appealing
- The containers seem to show that the store cares more, and it is probably shipped with better care
- looks neater
- stronger boxes less chance of damages
- A looks better because it is all in black containers.
- nicer display
- more organized and clean
- Plastic crates protect the Produce better.
- black plastic crates are more appealing and allow air to reach produce and protect from spoilage
- More organized
- no one wants to shop out of cardboard boxes
- I really do not like to purchase from the loose boxes

Why do you prefer this display? (RPC)

- neater
- Neat display
- It just looks more attractive and neater
- looks better
- look much better
- better display
- nice
- It looks so much neater and the produce looks much more vibrant
- More organized and streamlined in appearance.
- they are in better looking containers.
- I like that they aren't in boxes. It feels cleaner.
- looks easier to see stuff & you can wash them out.
- I don't care for cardboard boxes
- They are stack neater and not in boxes
- the bins are more attractive than the boxes, plus it's easier to shop.
- more organized

Why do you prefer this display? (RPC)

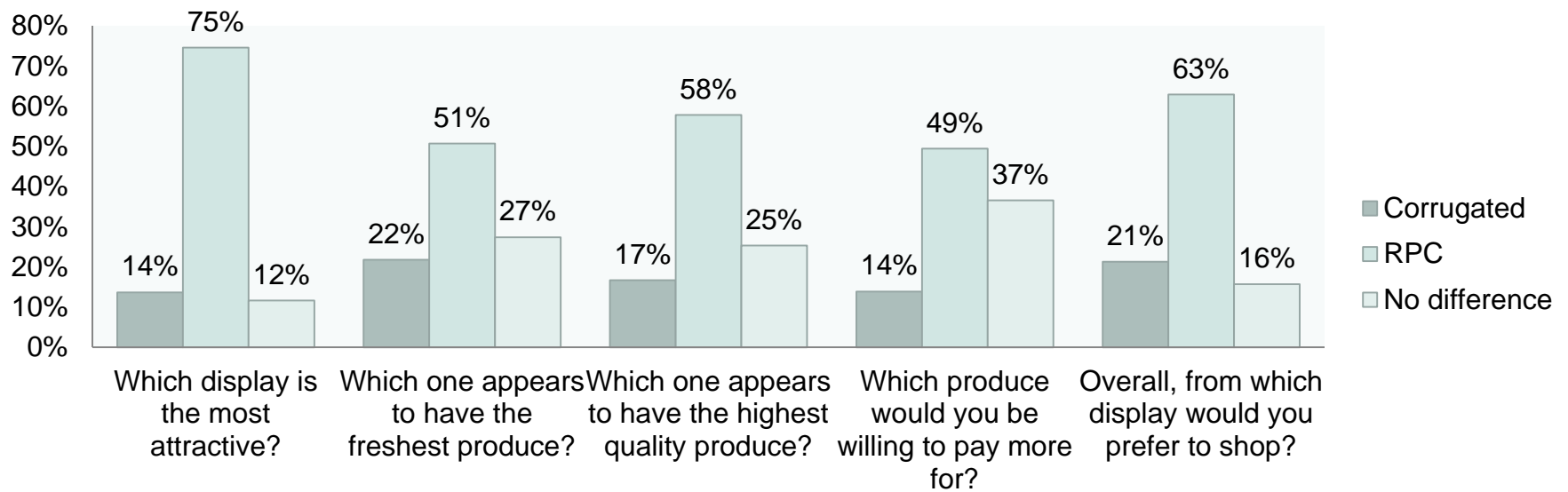
- It looks neater
- more sanitary
- looks like the bins used at producer. probably less handling.
- cleaner bins
- Cardboard boxes make produce spoil faster
- The plastic looks overall more attractive to me as a customer than just cardboard boxes.
- LOOKS MORE ORANGINZED
- nicer display
- no dirty or ripped boxes showing.
- no advertizing on box... display is neater
- looks better overall
- I'm always afraid the boxes will have spiders in them
- no cardboard
- Neater appearance, easier to see the product.
- Actually, it's kind of a balance--recyclable plastic containers versus biodegradable cardboard boxes; hard to decide

Why do you prefer this display? (RPC)

- do not like cardboard boxes
- crates make the food look better and won't fall out easily
- less cardboard
- Just looks neater. The boxes draw your eye to see if it really IS LOCAL produce. If the box says South America and it's supposed to be local, makes it look like they are liars.
- neater
- i just looks nicer
- It looks fresher and more inviting.
- The bins help it look better and better quality.
- higher quality and better presentation
- more eye catching
- Don't like the boxes.
- Organize of produce
- The all black crating gives it a uniform look and shows off the product.
- The plastic bin protect the product better than cardboard so less chance of damaged goods, also boxes stack on top of each other, I would think that the produce on the bottom could be damaged from all the weight on it.

Why do you prefer this display? (RPC)

- It looks clean and neat
- just the way it is set up
- well i prefer the crates ,they looks a lot neater
- I like the more uniform look of the bins (same color, black) rather than all different boxes like B
- The display looks nicer and more stable.
- looks better than boxes
- I like that they are using crates, seems cleaner
- There is a nice contrast with the back containers and the color of the produce
- easier to see the produce



Why do you prefer this display? (RPC)

- looks better
- looks
- organize and easy to find
- display casing looks better taken care of
- looks nicer
- Just strikes me as better
- Display A seems like what I would see at a farmers market
- produce looks nicer and fresher
- The food is more colorful, looks fresher, and the cartons are neater
- cleaner and neater
- less waste
- it is better organized
- Just has a better look to it.
- plastic bins are more practical, allow for air circulation and you can see better what is available
- it is actually labeled and not simply sitting in the boxes it was shipped in
- More organized.

Why do you prefer this display? (RPC)

- looks much better not out in cardboard packing boxes - that looks sloppy
- don't like seeing cardboard with food
- the black bins are a better contrast to the produce making it more eye catching
- never willint to pay more, but its cloeaner
- more appealing
- It looks nice and neat
- better looking
- looks like it has been well treated and put out to look nice
- looks cleaner
- neater
- they paid more for the displays and packaging - the first one is cheaper - doesn't mean the food isn't as good though
- looks better
- Looks neater and cleaner
- neater
- plastic bins look nicer

Why do you prefer this display? (RPC)

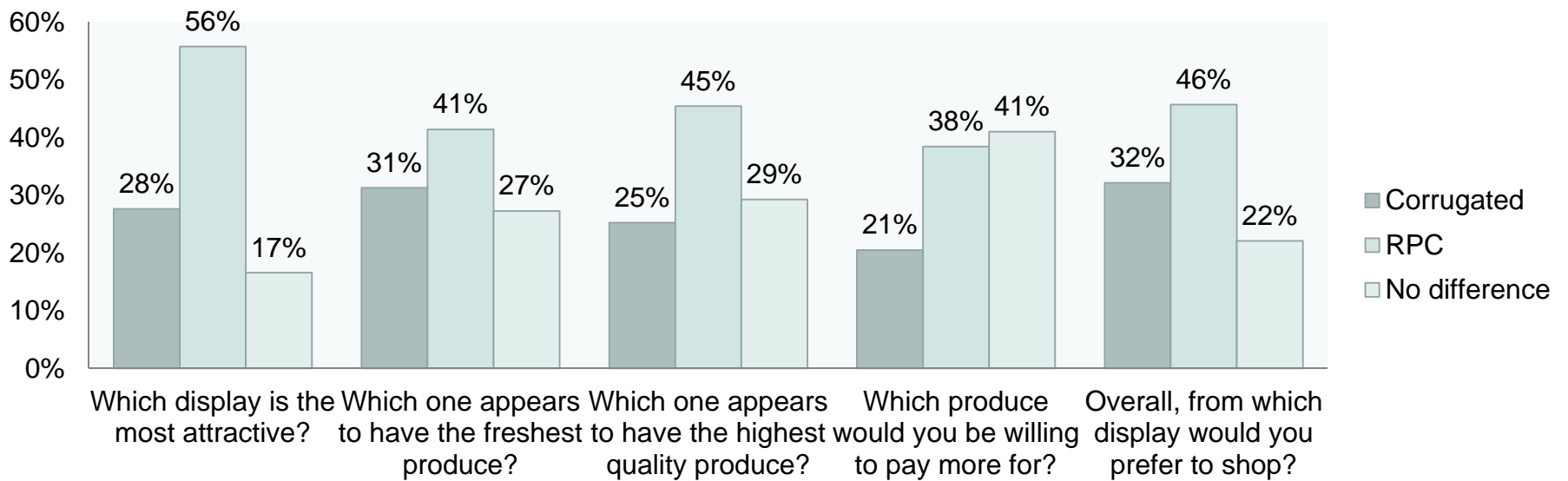
- more organized and clean
- Better temperature regulation. Also plastic containers look cleaner on the display.
- it looks better
- neater, cleaner
- cardboard looks trashy
- looks more organized
- Neater
- better looking
- it looks much nicer and more organized
- looks slightly neater. a little more effort put into the placement and display of fruit.
- Cleaner and more organized appearance.
- I like the look of the crates over the boxes.
- cleaner
- Cardboard boxes make produce spoil quicker
- I prefer the plastic display over the cardboard box display. Looks cleaner.
- organized, clean looking.

Why do you prefer this display? (RPC)

- display is neater
- don't like box displays they are too messy
- no cardboard
- do not like cardboard boxes
- crates make the food look better and keep it fresher longer
- less cardboard
- I really hate the garbage look of the boxes. It's unprofessional and looks like a farmer's market. If I wanted a farmers market, I'd go there.
- Don't like boxes
- like bins instead of boxes
- not all jammed in boxes
- Looks neater -
- better organization and is neat
- Don't like the boxes.
- This display looks professional and cleaner.
- The plastic bins protect the product better than cardboard. , though I prefer unbagged items over bagged items.

Why do you prefer this display? (RPC)

- I think fruit would be in better condition in the shallower bins
- looks better
- They are in a crate which air flow through them so it is better than the box.
- Display B looks to be cooled.
- the fruit looks more appetizing in the crates
- looks neater and cleaner
- I like the black bins better than the old cardboard boxes in A
- looks cleaner
- looks better than boxes
- seems cleaner
- Looks more organized an cleaner. I like a very clean store
- It looks cleaner
- The display seems cleaner



Why do you prefer this display? (RPC)

- looks better
- looks
- display case looks better
- looks nicer
- Neater and feel that when it is put on display, any bad produce is discarded
- It's organized
- looks better
- The right side has all organic food and look fresher. The cartons are neater
- Just looks fresher.
- it is more organized
- labeled nicely
- cardboard boxes look sloppy, lazy, & cheap
- looks better kept
- nice looking bins instead of just a bunch of boxes
- neater
- looks better

Why do you prefer this display? (RPC)

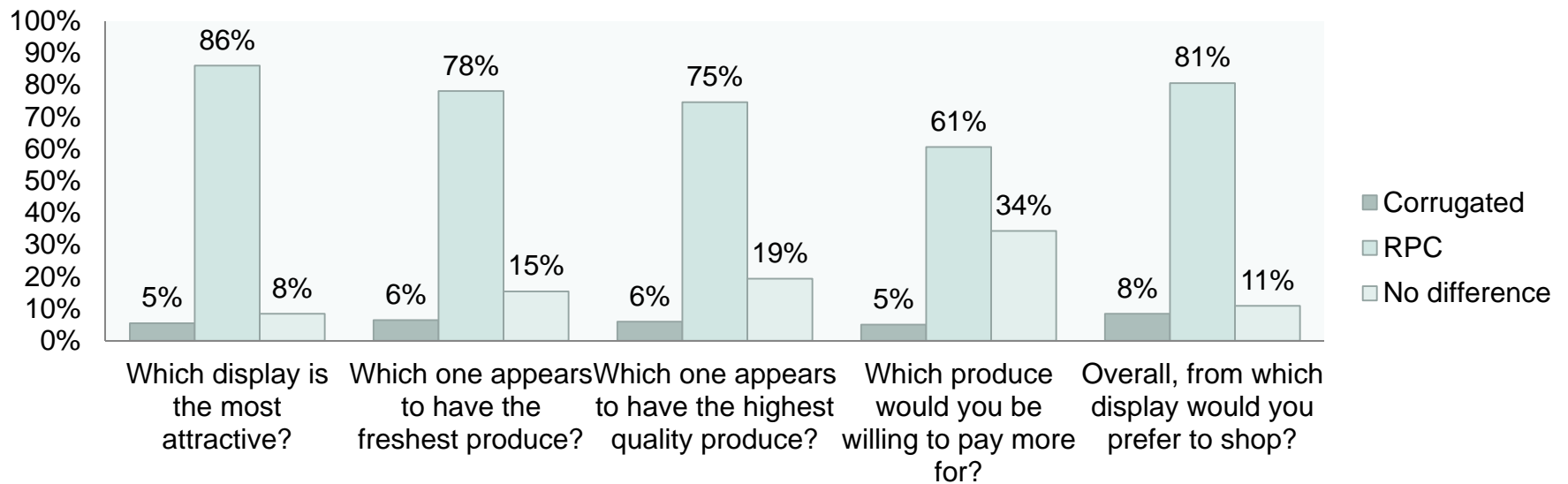
- food is displayed better
- it just looks cleaner
- appears neater and cleaner
- looks tacky with cardboard
- Looks much neater and cleaner
- plastic bins
- more organized and clean
- it looks better
- arranged neater
- looks like a permanent display, not a fly-by-night operation
- fresher
- looks fresher
- better neater
- I just think it looks more organized. i like the produce pulled out of the boxes it has been shipped in makes it seem like they cared a bit more, took more time and effort
- Cleaner and more organized.

Why do you prefer this display? (RPC)

- cleaner
- Produce looks of better quality
- nicer display
- no dirty boxes
- easier bins to access... more orderly
- overall the best
- box displays look lazy
- no cardboard
- more organized
- crates make the food fresher and last longer as well as makes it display better
- less cardboard
- Again, boxes suggest laziness and that there might be bad items in the bottom. Putting them on the shelf suggests someone has weeded out any bad items.
- no boxes
- I like that its not in boxes.
- better organization and is neatly organized

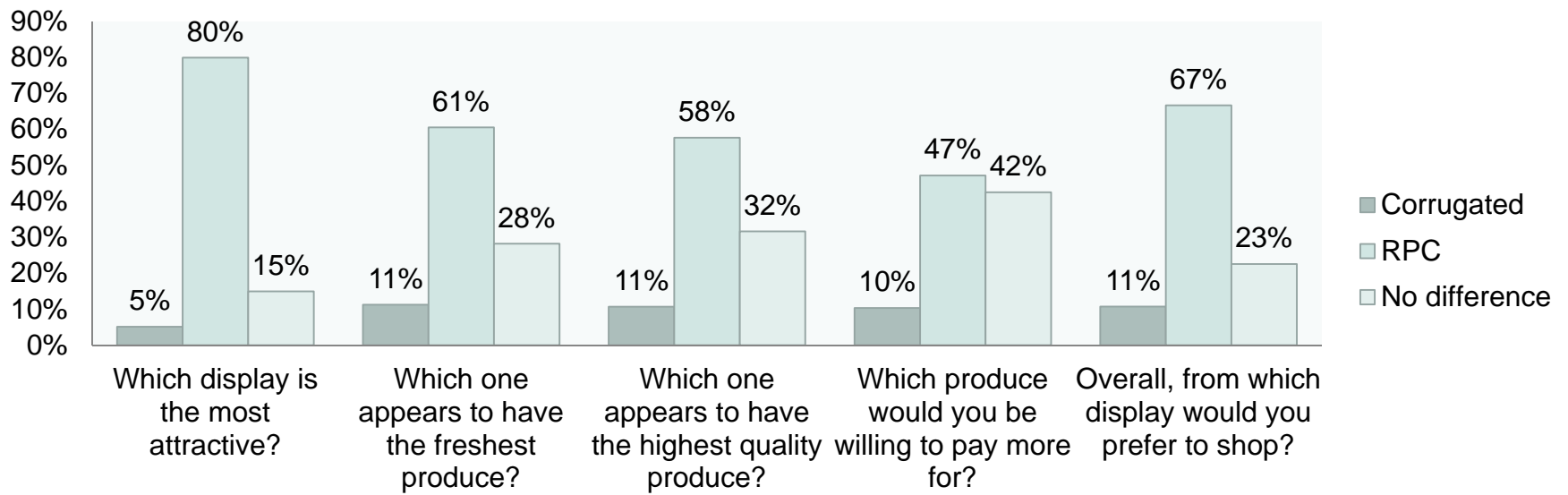
Why do you prefer this display? (RPC)

- This looks cleaner and professional.
- Plastic protects the product better and cardboard, it also has a neater look to it and can be signed better than the one with just boxed goods.
- don't like to pick out of boxes
- It more neater and organize. Crate is better than the box.



Why do you prefer this display? (RPC)

- fresher looking
- fresh and good.
- fresher
- Doesn't seem as thrown together as the other one does
- produce is seen more easily
- fresher
- the green shows up better
- looks cleaner



Why do you prefer this display? (RPC)

- looks better
- neatness
- Items appear more selective.
- fresh and eyes catchy
- cases are more attractive
- The bins are uniform and neatly organised...
- looks tidier
- Looks much neater
- It's more organized
- fresher
- produce looks much nicer
- more organized
- fresher
- cleaner and neater
- it is well organized
- Catches my eyes more.

Why do you prefer this display? (RPC)

- the color shows up better
- because it is very neat
- More organized and tidier.
- would not want to shop product out in crappy cardboard boxes
- looks much better and fresh
- B, because it neat.
- fresher looking
- the crates make for a better looking display
- neater
- Food is displayed better and looks fresher
- the display is layed out neatly and not cluttered like display a
- product is more shoppable and easier to get to
- neater and cleaner
- lose the cardboard
- plastic bins
- more organized and clean

Why do you prefer this display? (RPC)

- tidier
- Display B is easier to select produce from.
- it looks better
- more appealing
- The uniform boxes make it appear better
- neater easy to see
- no cardboard
- fresher
- brighter
- looks organized
- Neater
- The display seems neater and more organized
- Neater and better organized.
- cleaner looking
- Easier to view these than in display A
- B is slightly better. A little more organized, a little more care, looks cleaner

Why do you prefer this display? (RPC)

- More organized and cleaner.
- The display makes the produce look fresher and more visually appealing.
- Because it is nice and neat and is a nice display in general.
- Bins more attractive & looks better to the eye.
- this display looks quite easy to choose from and everything is easy to choose from
- I prefer the bins rather than the boxes, and it's easier to shop.
- more orderly
- Produce looks fresher and cardboard boxes make produce spoil quicker
- Display A just doesn't have the "eye appeal" that Display B does.
- neater looking
- nicer display
- clean looking, well organized.
- more orderly display
- shallow containers make it easier to see produce
- overall better
- Display A looks messy

Why do you prefer this display? (RPC)

- Not cluttered looking
- no cardboard
- looks fresher and less handled
- looks cleaner
- makes it display better
- less cardboard
- Better in crates
- looks better
- more organized
- displayed nicer
- looks like all has been inspected before putting on the shelf
- I don't want my food in boxes like the other one.
- This display shows off the produce better.
- Has a neater and more organized look to it. Also plastic bins protect product better.
- Crates looks nicer than boxes
- Crate make it look well organize and it won't fall out.. Better than the box.
- looks neater and cleaner

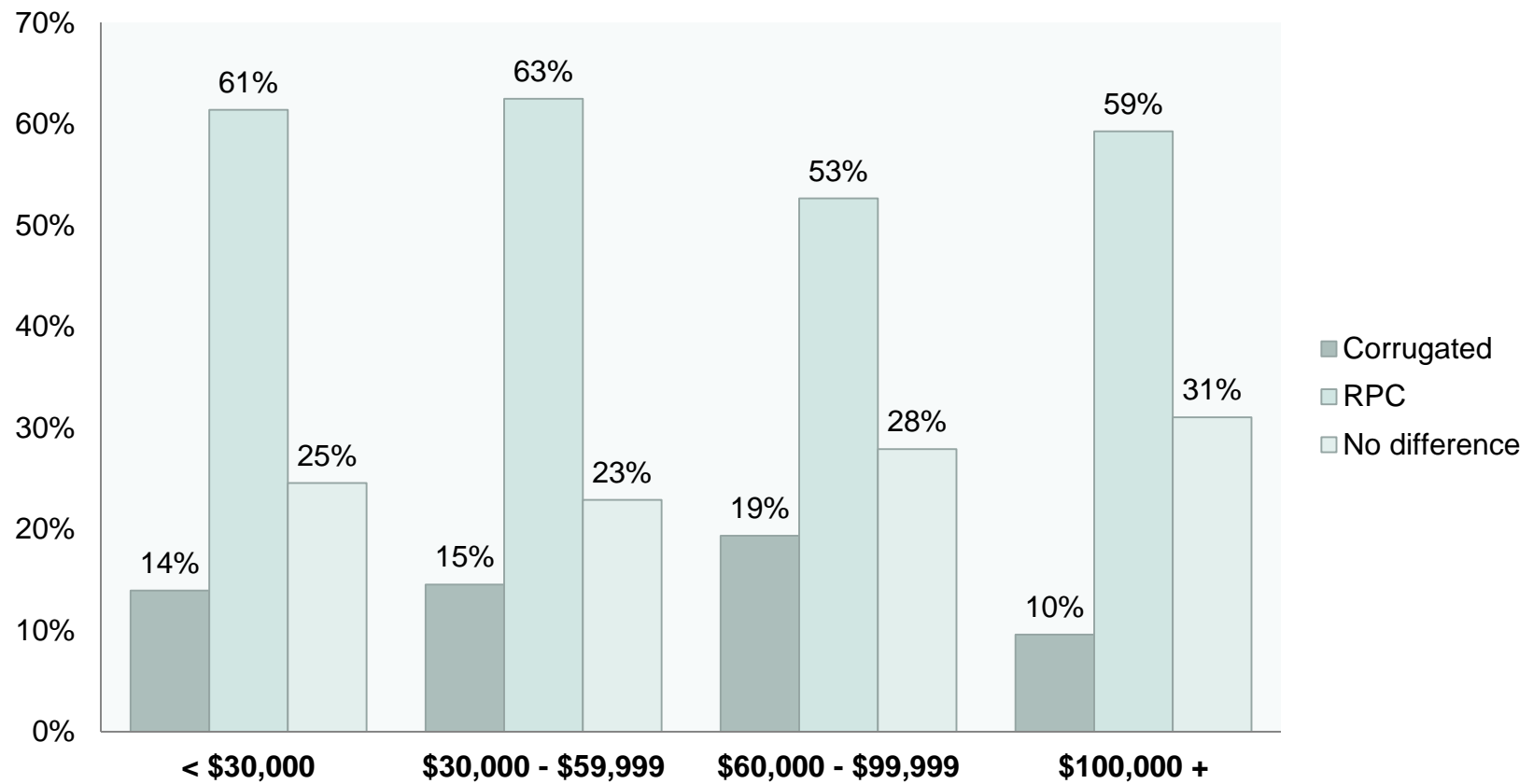
Responses: By Income Group



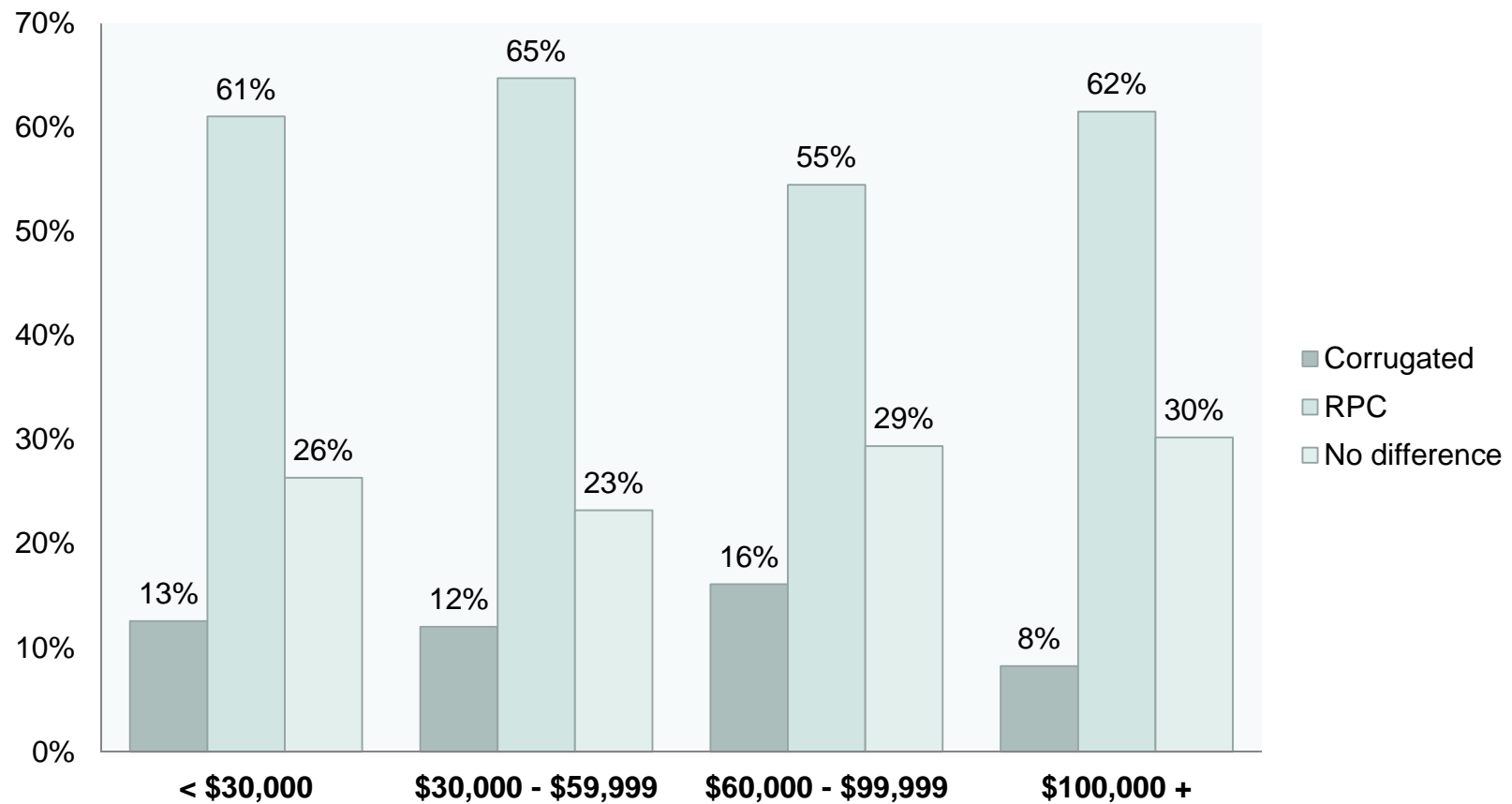
Which display is the most attractive?



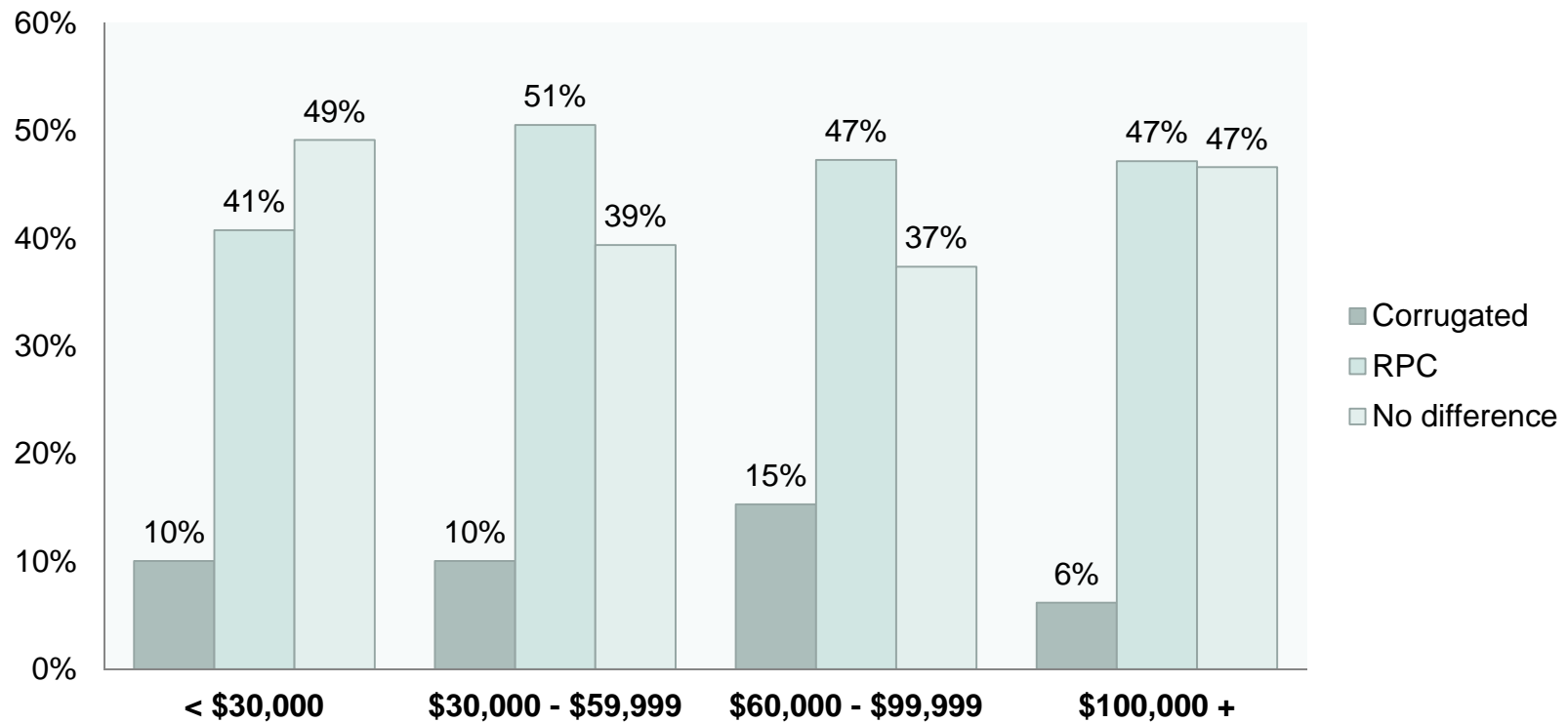
Which one appears to have the freshest produce?



Which appears to have the highest quality produce?



Which produce would you be willing to pay more for?



Overall, from which display would you prefer to shop?

