



Factors Influencing Pulse Consumption in Canada

Segment Toolkit: Informed Champions

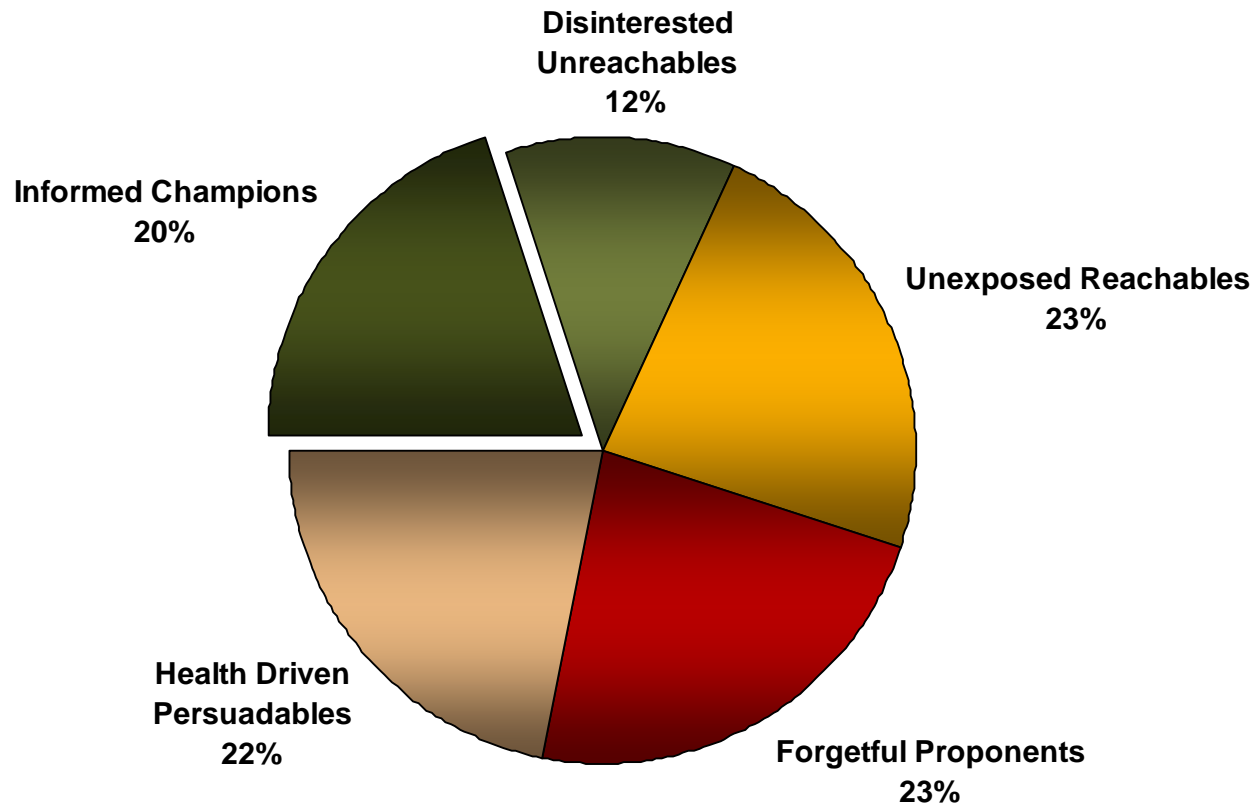




Segmentation Summary



Pulse Consumer Segments



Base: All respondents (n=1,100)

Segmentation Summary

Segment Name & Size	Informed Champions (20%)	Disinterested Unreachables (12%)	Unexposed Reachables (23%)	Forgetful Proponents (23%)	Health Driven Persuadables (22%)
Motto	<i>"Pulses are superfoods"</i>	<i>"I don't give much thought to food and health"</i>	<i>"I don't like the taste and I don't know how to cook them, but if they are healthy and help with weight control..."</i>	<i>"I really like pulses, but need someone to jog my memory and give me new recipe ideas"</i>	<i>"Tell me how! I like pulses, I find the health and enviro benefits motivating, but I don't know how to cook them"</i>
Pulse Consumption	<ul style="list-style-type: none"> • 51% weekly consumers & 48% monthly consumers • Highest frequency of monthly consumption at ethnic restaurants 	<ul style="list-style-type: none"> • 46% non-consumers & 46% monthly consumers • Among restaurant consumers, high consumption at fast food restaurants (35%) 	<ul style="list-style-type: none"> • 44% non-consumers & 53% monthly consumers • Among restaurant consumers, lowest frequency of consumption 	<ul style="list-style-type: none"> • 70% monthly consumers & 23% weekly consumers • High past 6 months consumption at restaurants (47%) 	<ul style="list-style-type: none"> • 75% monthly consumers & 13% weekly consumers • Lower frequency of consumption at fast food and non-ethnic restaurants
Attitudes Towards Pulses	<ul style="list-style-type: none"> • Like the taste (99%) • Family likes eating pulses (91%) • Trying to choose vegetarian meals more often (72%) • Pulses are part of traditional diet (68%) 	<ul style="list-style-type: none"> • Don't like the taste of pulses (37%; 26% DK/NA) • Family doesn't like eating pulses (42%; 29% DK/NA) • Not trying to choose vegetarian meals more often (61%; 27% DK/NA) • Not part of traditional diet (60%; 27% DK/NA) 	<ul style="list-style-type: none"> • Don't think of including in meal planning (82%) • Don't know how to cook or prepare (75%) • Don't like the taste (54%; 17% DK/NA) • Family doesn't like eating pulses (43%; 29% DK/NA) • Not part of traditional diet (87%) • Not trying to choose vegetarian meals (85%) 	<ul style="list-style-type: none"> • Like the taste (92%) • Family likes eating pulses (74%) • Know how to cook or prepare pulses (85%) • Half say pulses are part of traditional diet (49%) • Just under half (45%) don't think about including pulses in meal planning or preparation 	<ul style="list-style-type: none"> • Don't think of including in meal planning (86%) • Don't know how to cook or prepare (74%) • Most like the taste (77%) • Comparatively fewer say their family likes eating pulses (59%) • Half are trying to choose vegetarian meals more often (48%)

Segmentation Summary Continued

Segment Name & Size	Informed Champions (20%)	Disinterested Unreachables (12%)	Unexposed Reachables (23%)	Forgetful Proponents (23%)	Health Driven Persuadables (22%)
Attitudes Towards Food and Health	<ul style="list-style-type: none"> • Usually look at nutritional labels (96%) • Concerned about eating a healthy diet (99%) • Like to try out different types of foods and recipes (97%) • Enjoy eating ethnic foods (84%) 	<ul style="list-style-type: none"> • Do not usually look at nutritional labels (86%) • Do not look for healthy snacks (69%) • Not concerned about weight control (64%) • Not concerned about eating a healthy diet (56%) • Do not like to try new foods or recipes (58%) 	<ul style="list-style-type: none"> • Concerned about weight control (90%) • Concerned about eating a healthy diet (94%) • Look for healthy snacks (88%) • Do not like eating ethnic foods (67%) 	<ul style="list-style-type: none"> • Like to try out different types of foods and recipes (74%) • Over half (54%) enjoy eating ethnic foods 	<ul style="list-style-type: none"> • Usually look at nutritional labels (90%) • Look for healthy snacks (94%) • Like to try out different types of foods and recipes (94%) • Enjoy eating ethnic foods (81%) • Busy, on-the-go lifestyle (79%)
Other Defining Characteristics	<ul style="list-style-type: none"> • Extremely health conscious • Environmentally engaged and when possible, buy food grown in Canada • Health benefits clearly the most important factors when deciding whether or not to eat pulses • Info about both health and environmental benefits would have a positive impact on consumption 	<ul style="list-style-type: none"> • Taste is by far the most important factor when deciding whether or not to eat pulses • Info about health and environmental benefits would <u>not</u> make most more likely to eat pulses 	<ul style="list-style-type: none"> • Taste is the most important factor when deciding whether or not to eat pulses • Info about health benefits would make the majority more likely to eat pulses 	<ul style="list-style-type: none"> • Wanting 'variety in my diet' is a barrier to eating pulses more often • Taste and health benefits are the top two factors when deciding whether to eat pulses • High fibre and protein content are important • Info about health benefits would make the majority more likely to eat pulses 	<ul style="list-style-type: none"> • Extremely health conscious • Environmentally engaged and when possible, buy food grown in Canada • Health benefits the most important factors when deciding whether or not to eat pulses • Info about both health and environmental benefits would make them more likely to eat pulses

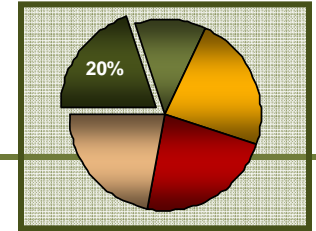
Segmentation Summary Continued

Segment Name & Size	Informed Champions (20%)	Disinterested Unreachables (12%)	Unexposed Reachables (23%)	Forgetful Proponents (23%)	Health Driven Persuadables (22%)
Profile	<ul style="list-style-type: none"> • Highest incidence of vegetarian or vegan in household (12%) • Higher female (61%) • Highest education (33% university degree, 48% post-secondary) • Highest in British Columbia (29%) • Half live in two person households (53%) 	<ul style="list-style-type: none"> • Highest percentage of underweight (14%) • Low incidence of heart disease or high blood cholesterol levels in household (16%) • Majority male (56%) • Youngest segment (average age 43 years) • Less educated (15% university degree) • Three-in-ten live alone 	<ul style="list-style-type: none"> • Not differentiated by age, gender, education or income • Lowest in British Columbia (13%) • Highest incidence of born and raised in Canada (93%) 	<ul style="list-style-type: none"> • Majority male (55%) • Older – lowest percentage of 18 to 34 year olds (20%), average age 49 years • Lowest in Atlantic Canada (14%) 	<ul style="list-style-type: none"> • Not differentiated by age, gender or education • Highest percentage (22%) in the \$100K+ income bracket
Messaging and Marketing	<ul style="list-style-type: none"> • Highest consumption – no need to target directly • Messages targeting other segments will resonate 	<ul style="list-style-type: none"> • Low opportunity segment • Recipe ideas, health benefits and environmental benefits unlikely to have any impact 	<ul style="list-style-type: none"> • Best opportunity for converting non-consumers • Provide a variety of 'great tasting' basic recipes for pulses • Focus on the health benefits of pulses, including weight control 	<ul style="list-style-type: none"> • Opportunity to move from monthly to weekly • Provide new and different recipes – teach them the wide variety of ways they can be used • Remind about the fibre and protein content as well as other health benefits 	<ul style="list-style-type: none"> • Opportunity to move from monthly to weekly • Teach them how to cook pulses • Provide a variety of quick, easy to prepare recipes including vegetarian and ethnic • Primary focus health; secondary environment



Informed Champions: Snapshot





Key Differentiators



Attitudes Towards Pulses

- ✓ Like the taste of pulses (99%)
- ✓ Family likes eating pulses (91%)
- ✓ Trying to choose vegetarian meals more often (72%)
- ✓ Pulses are part of traditional diet (68%)

Attitudes Towards Food and Health

- ✓ Usually look at nutritional labels (96%)
- ✓ Concerned about eating a healthy diet (99%)
- ✓ Like to try out different types of foods and recipes (97%)
- ✓ Enjoy eating ethnic foods (84%)

Demographics:

- ✓ Highest incidence of vegetarian or vegan in household (12%)
- ✓ Higher female (61%)
- ✓ Highest education (33% university degree, 48% post-secondary)
- ✓ Highest representation in British Columbia (29%)
- ✓ Half live in two person households (53%)

Other Defining Characteristics:

- ✓ Extremely health conscious
- ✓ Environmentally engaged – environmentally sustainable agricultural practices are important in food purchases (85%)
- ✓ When possible, purchase food made or grown in Canada (91%)
- ✓ Health benefits are clearly the most important factors when deciding whether or not to eat pulses
- ✓ Information about both health and environmental benefits would make them more likely to eat pulses

Pulse Consumption

■ Weekly ■ Monthly ■ Non-consumer



- ✓ High past 6 months pulse consumption at restaurants (49%)
- ✓ Highest monthly consumption at ethnic restaurants (48%)



Informed Champions: Messaging and Marketing

- ❖ Informed Champions embrace virtually all aspects of pulses from taste to health benefits to environmental benefits.
- ❖ Given their already high levels of pulse consumption and positive attitudes towards pulses, food and health, Informed Champions are not a key target for marketing efforts.
- ❖ That being said, it is likely that messages targeting other segments will reach Informed Champions and will resonate strongly.
 - ◆ This could increase the frequency of pulse consumption among this group.



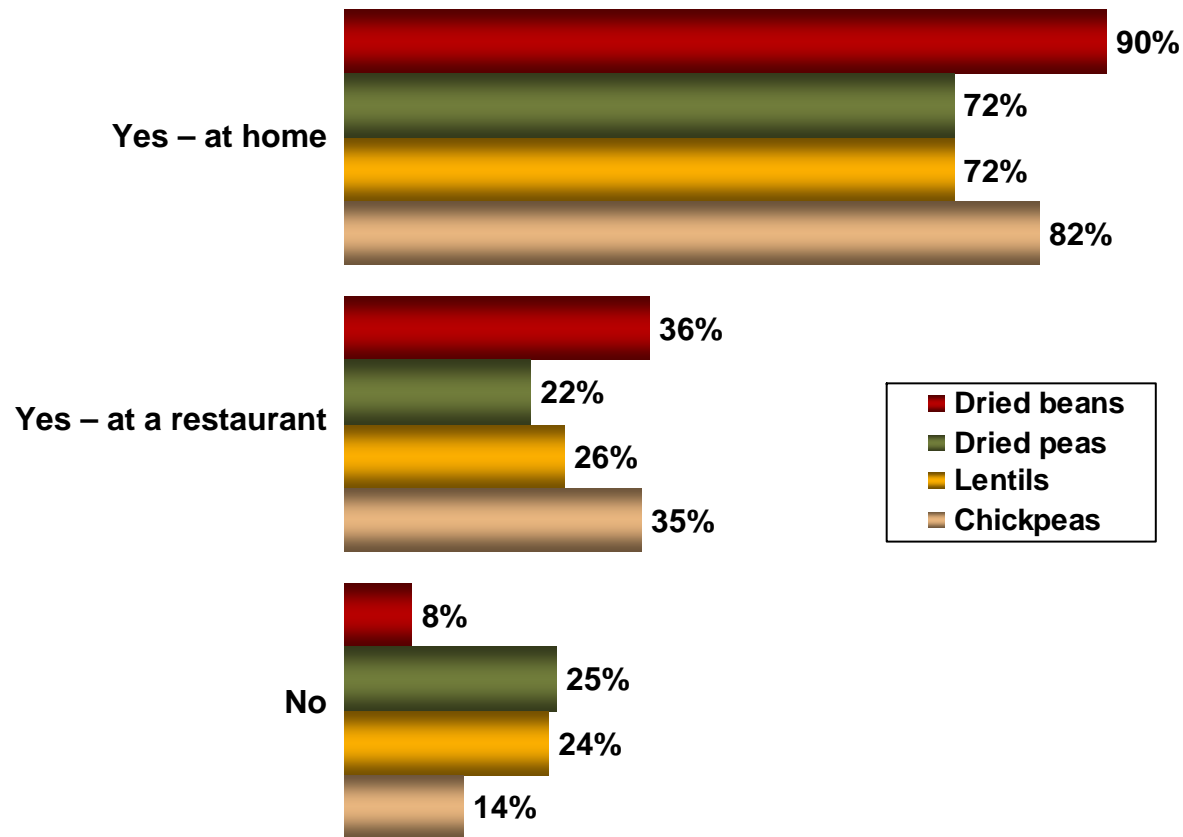
Pulse Consumption: Types, Frequency and Form





Past Six Months Pulse Consumption Informed Champions

Q1/Q5/Q9/Q13. In the past 6 months, have you eaten dishes made with *dried beans/dried peas/lentils/chickpeas or chickpea flour* either in your home or at any type of restaurant?



Location of Pulse Consumption

- ❖ Home only: 50%
- ❖ Home and restaurant: 48%
- ❖ Restaurant only: 1%
- ❖ Non-consumers: 1%

■ Dried beans
■ Dried peas
■ Lentils
■ Chickpeas

Number of Different Pulses Consumed

- ❖ None: 1%
- ❖ 1: 6%
- ❖ 2: 12%
- ❖ 3: 28%
- ❖ 4: 54%

Base: All respondents (n=223)



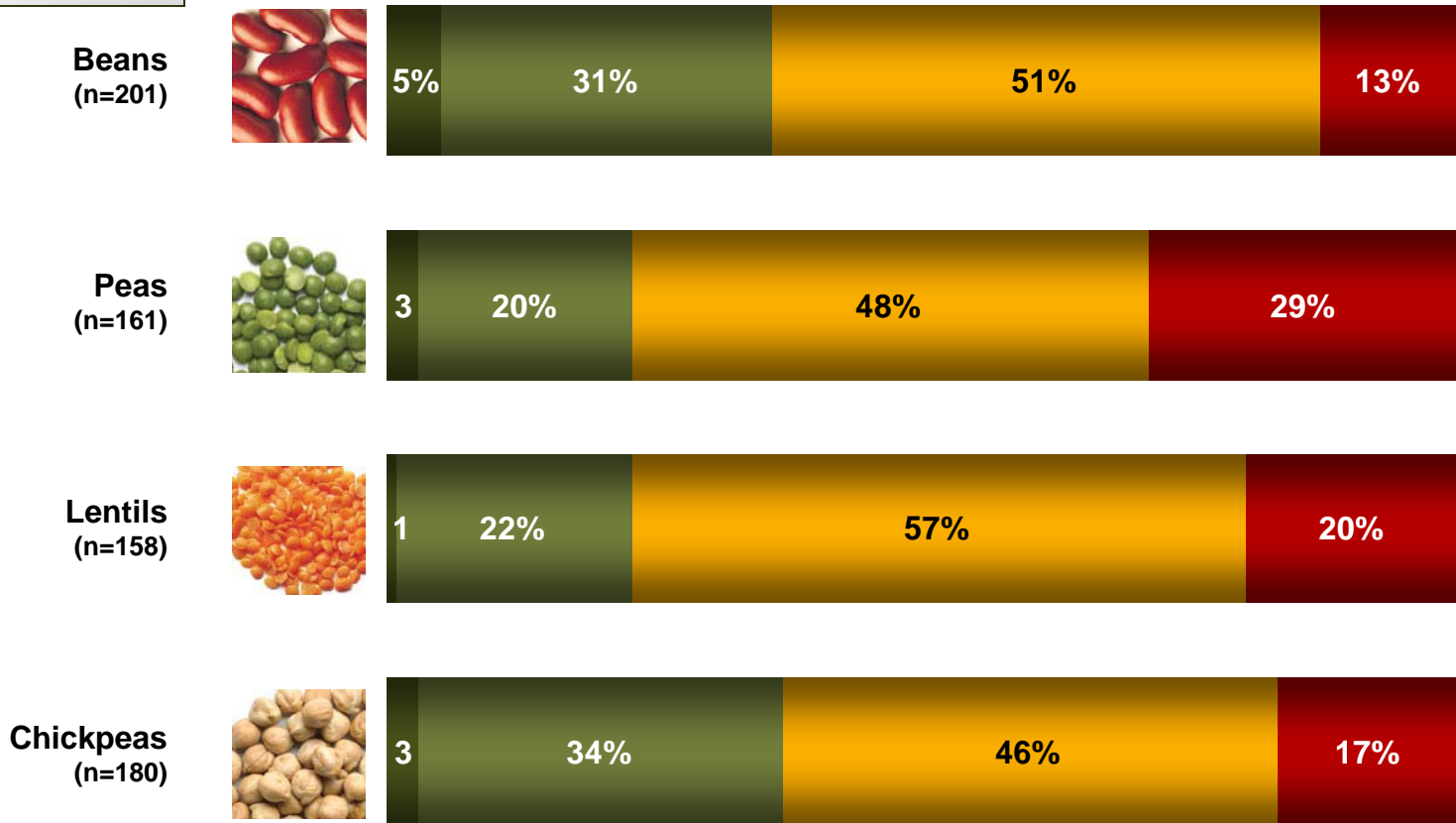
Frequency of Pulse Consumption at Home

Informed Champions

Q2/Q6/Q10/Q14. How often do you or do other members of your household eat dishes made with *dried beans or bean flour/dried peas/lentils/chickpeas or chickpea flour* at home?

❖ Moderate to heavy: 51%
 ❖ Light: 48%
 ❖ Non-consumers: 1%

■ 4 or more times per week ■ 1 to 3 times per week ■ 1 to 3 times per month ■ Less than once a month



Non-consumers = No pulse consumption in past 6 months

Light consumers = Consumed 1 or more types pulses in the past 6 months but none weekly or more

Moderate to heavy consumers = Consumed 1 or more types of pulses in the past 6 months weekly or more

Base: Past 6 months pulse consumption at home

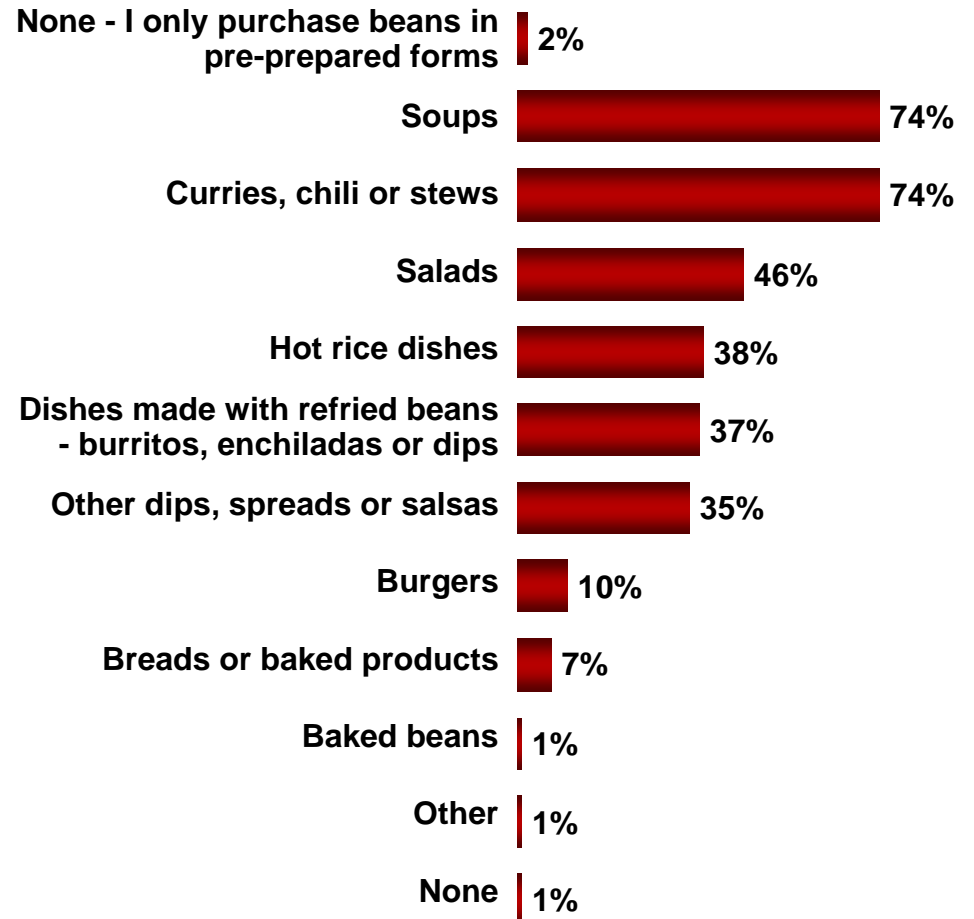
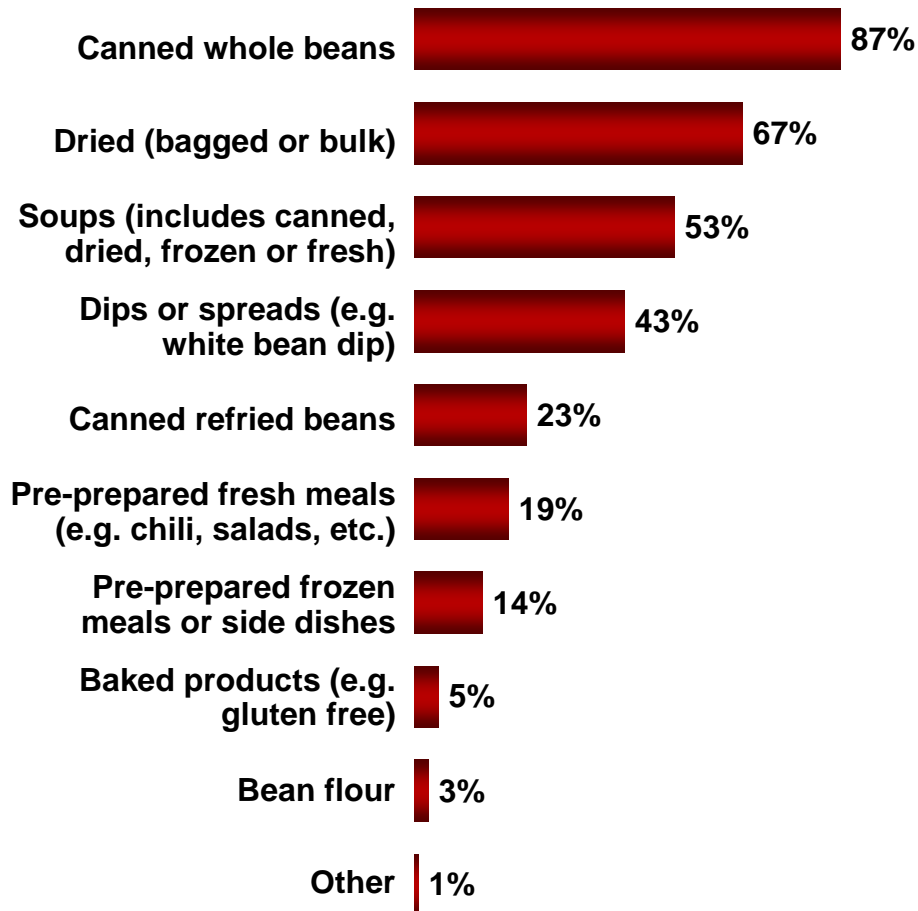


Dried Beans: Form and Types of Dishes Consumed at Home

Informed Champions

Q3. In what form do you purchased **dried beans** you eat at home? (Note: This does not include fresh, frozen or canned green [string] beans).

Q4. What types of dishes do you make with **dried beans** (whether bagged, bulk or canned) or bean flour at home?



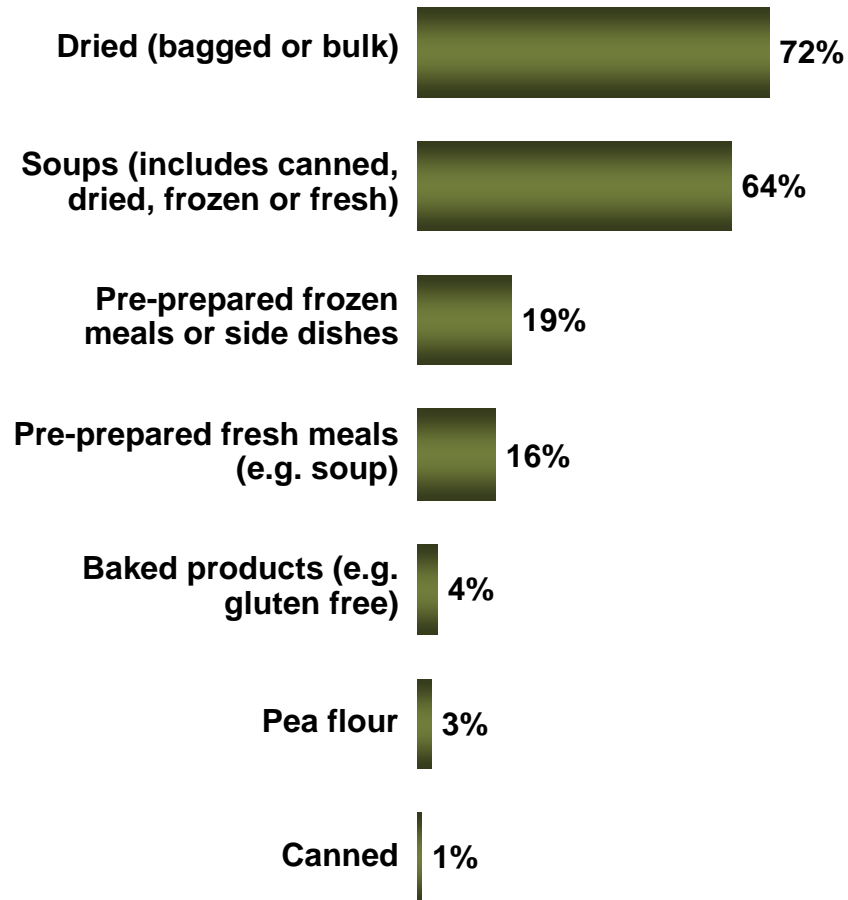
Base: Past 6 months dried bean consumption at home (n=201)



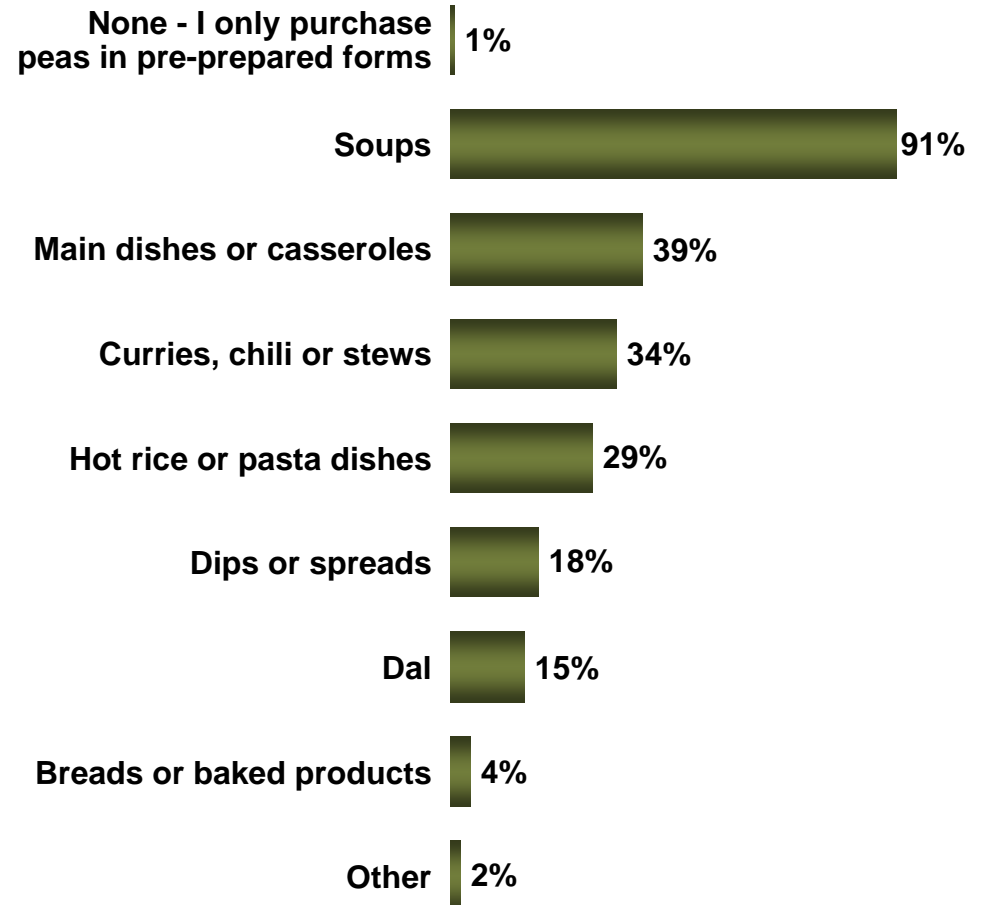
Dried Peas: Form and Types of Dishes Consumed at Home

Informed Champions

Q7. In what form do you purchased **dried peas** you eat at home? (Note: This does not include fresh, frozen or canned green peas).



Q8. What types of dishes do you make with **dried peas** (whether bagged, bulk or canned) or pea flour at home?



Base: Past 6 months dried peas consumption at home (n=161)

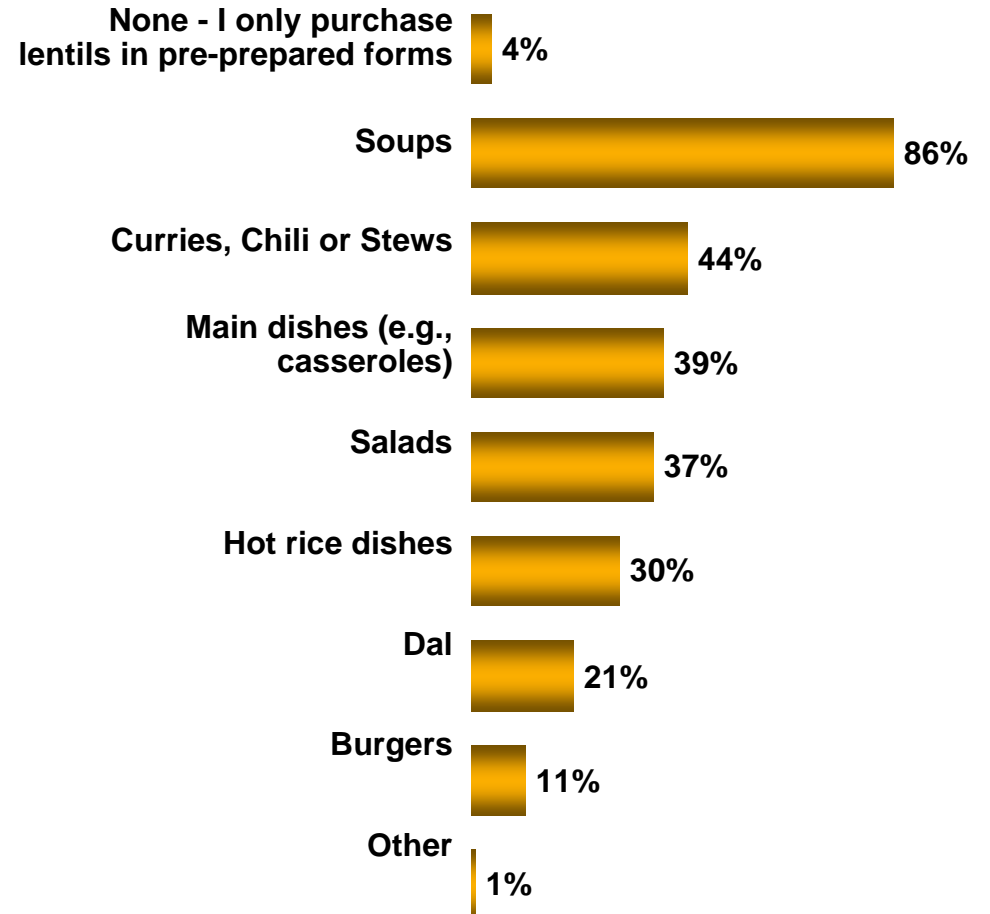
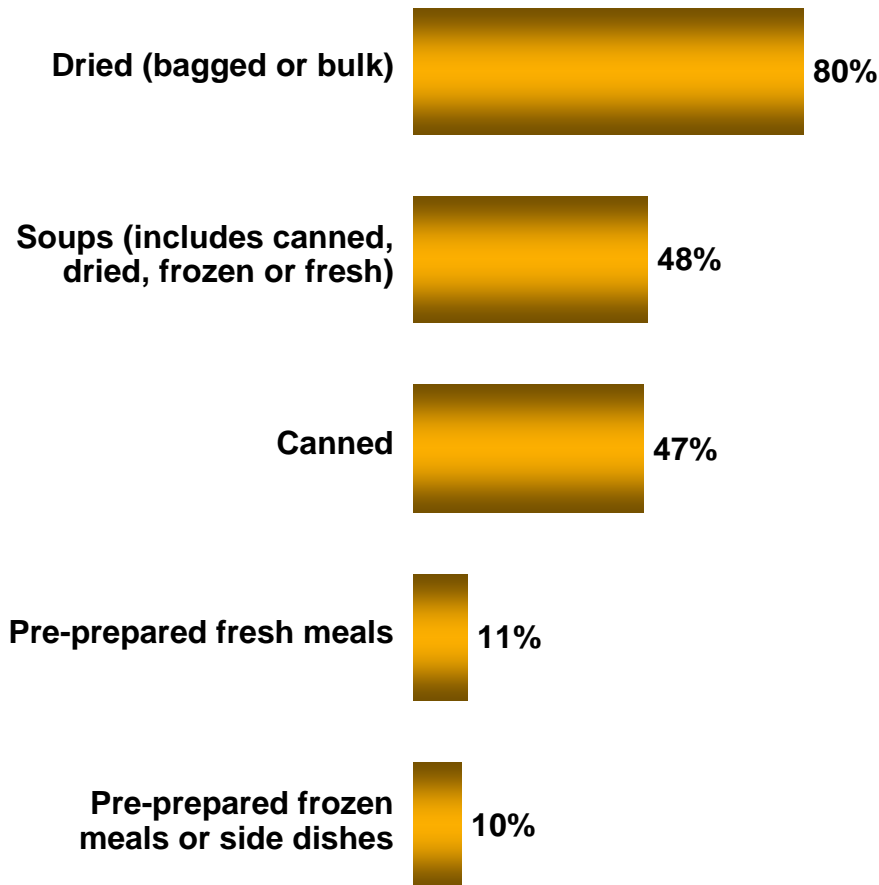


Lentils: Form and Types of Dishes Consumed at Home

Informed Champions

Q11. In what form do you purchased *lentils* that you eat at home?

Q12. What types of dishes do you make with *lentils* (whether bagged, bulk or canned) at home?



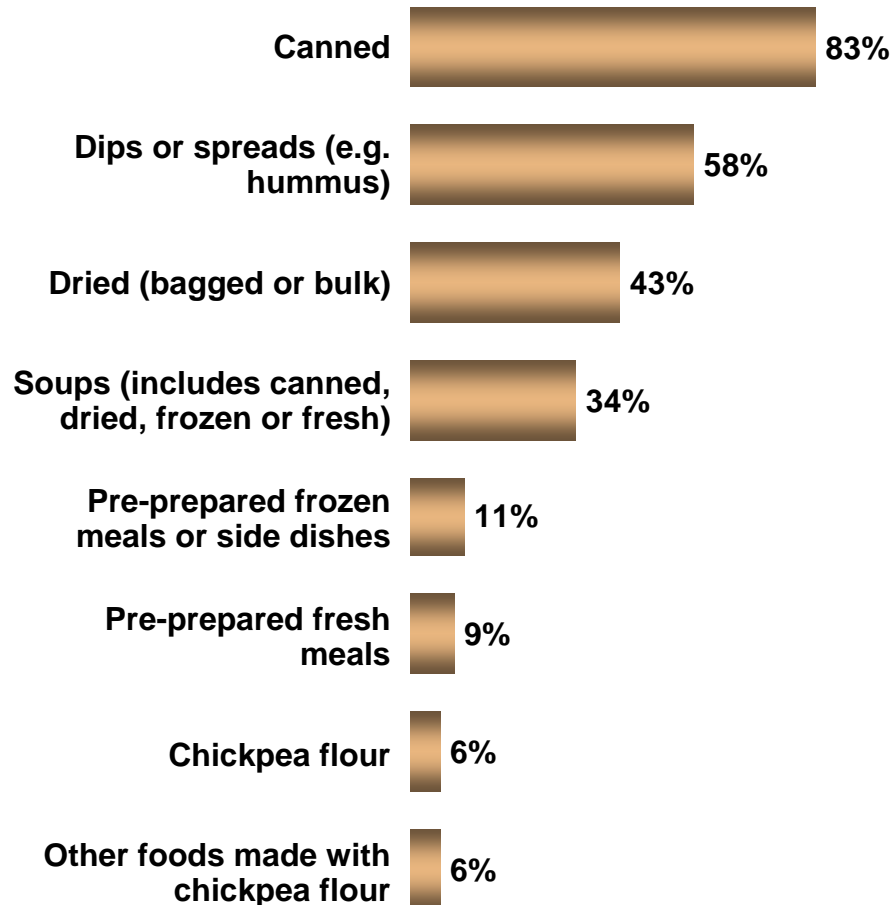
Base: Past 6 months lentil consumption at home (n=158)



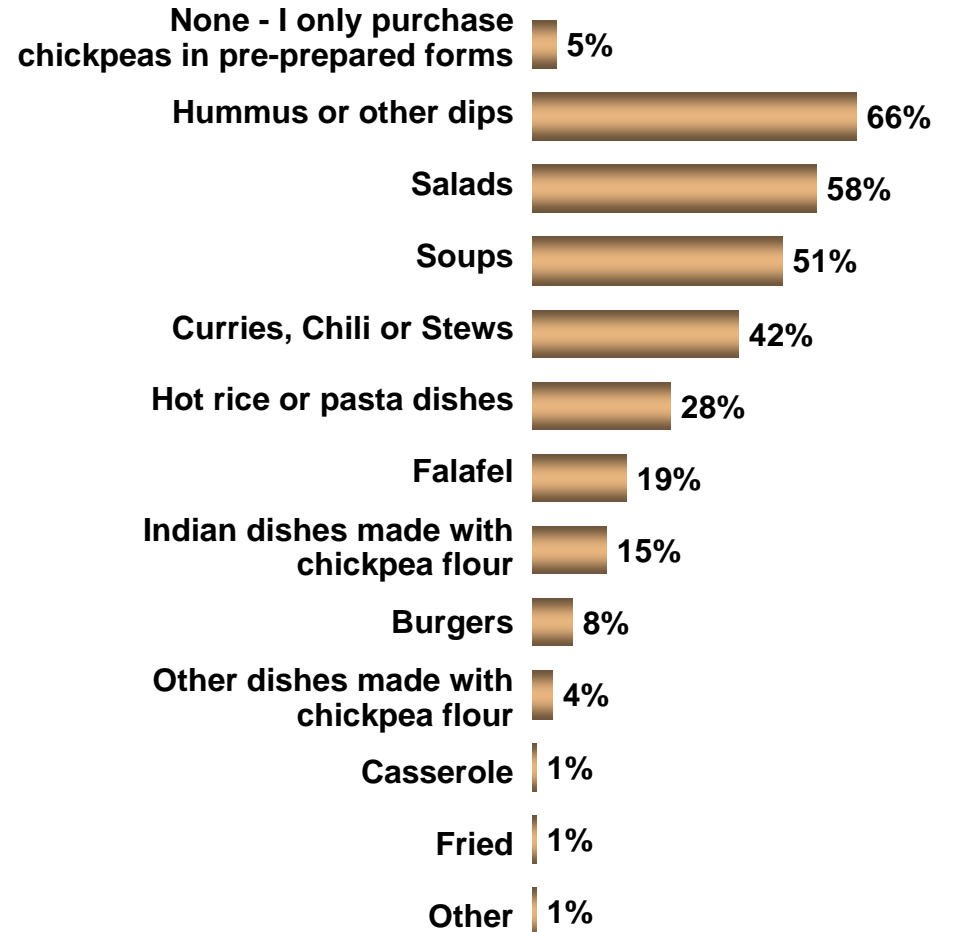
Chickpeas: Form and Types of Dishes Consumed at Home

Informed Champions

Q15. In what form do you purchased **chickpeas** that you eat at home?



Q16. What types of dishes do you make with **chickpeas** (whether bagged, bulk or canned) or chickpea flour at home?



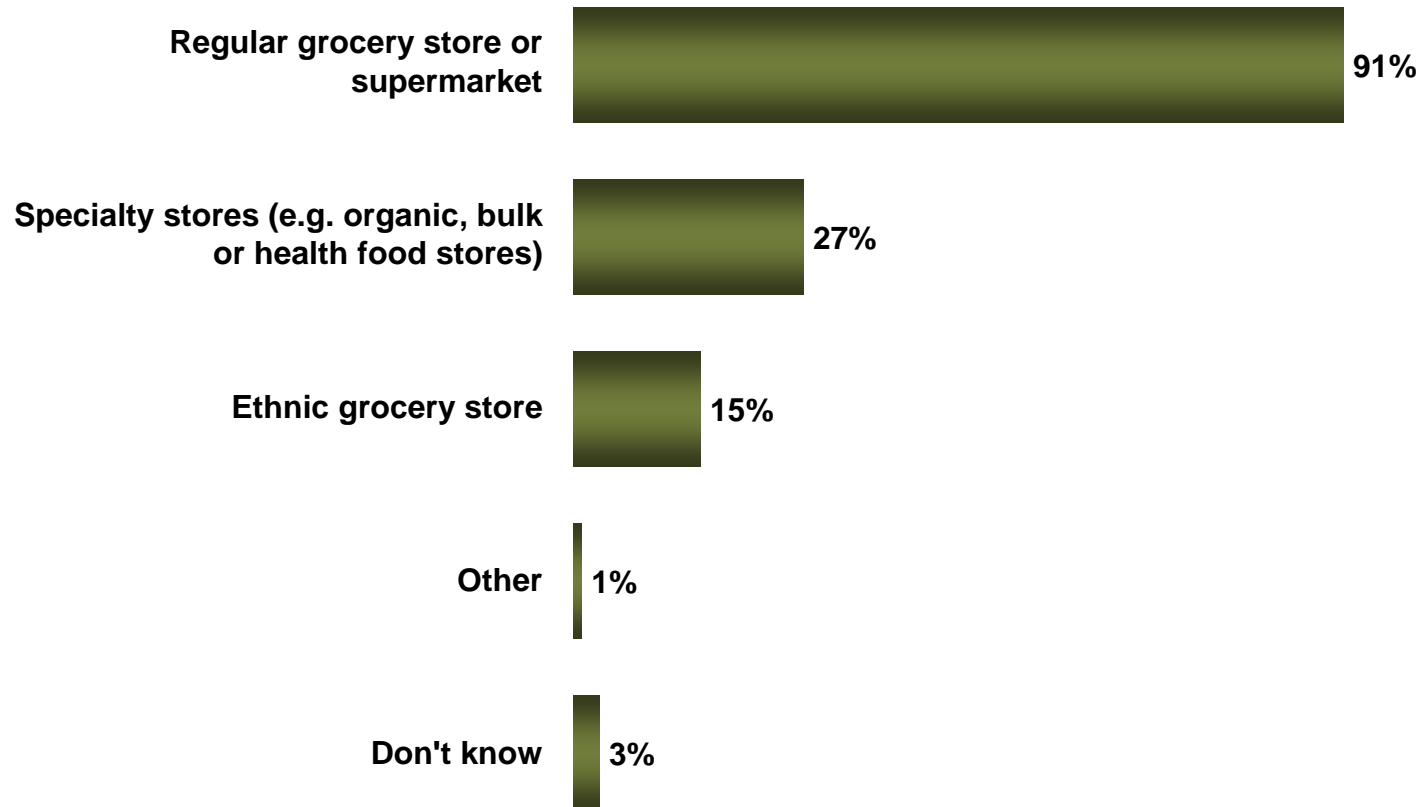
Base: Past 6 months chickpea consumption at home (n=180)



Purchase of Pulses for Home Use

Informed Champions

Q17. Where do you usually purchase pulses that you use at home?



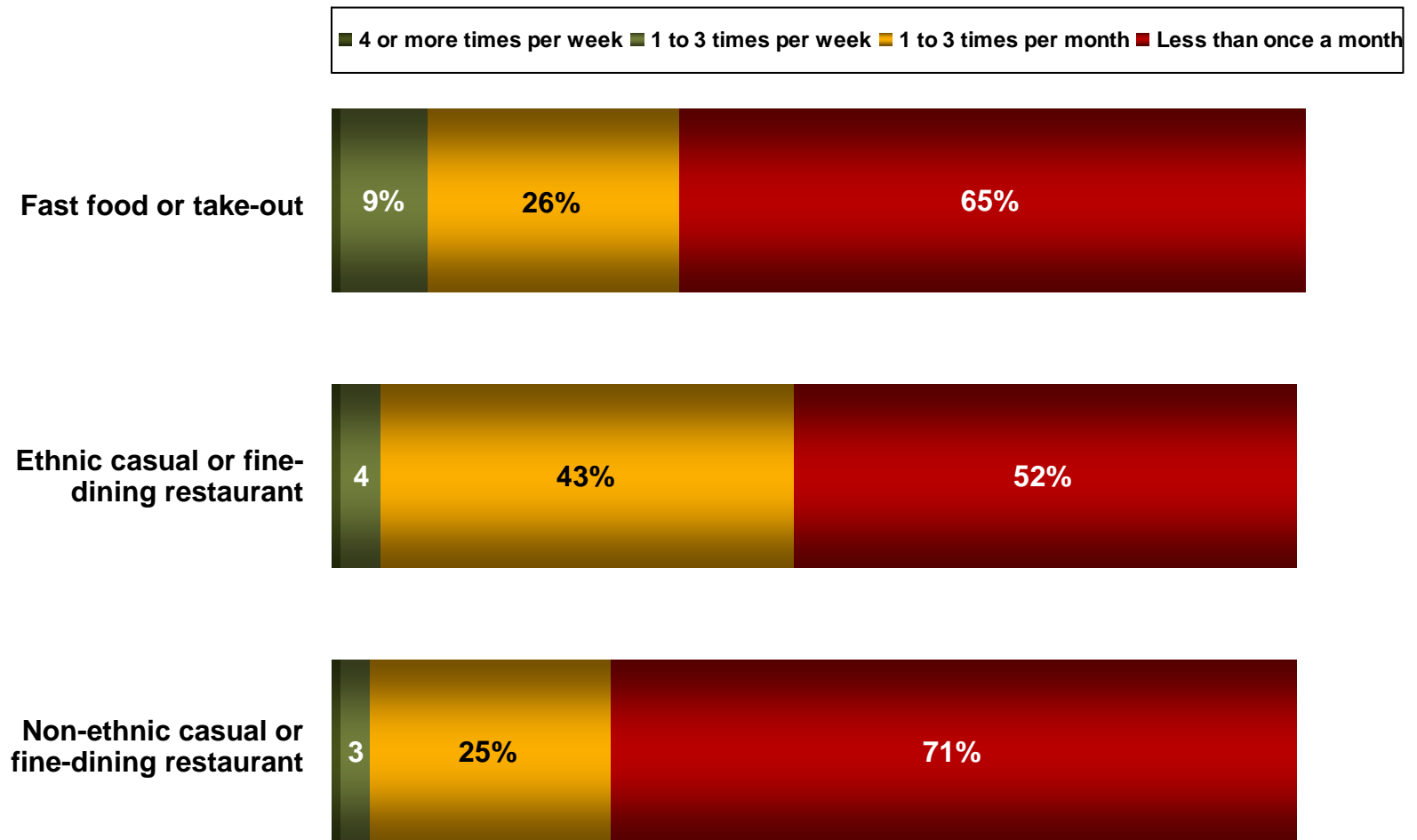
Base: Past 6 months pulse consumption at home (n=220)



Frequency of Pulse Consumption at Restaurants

Informed Champions

Q18. Approximately, how often do you eat dishes using pulses (dry beans, peas, lentils and chickpeas) at each of the following types of restaurants?



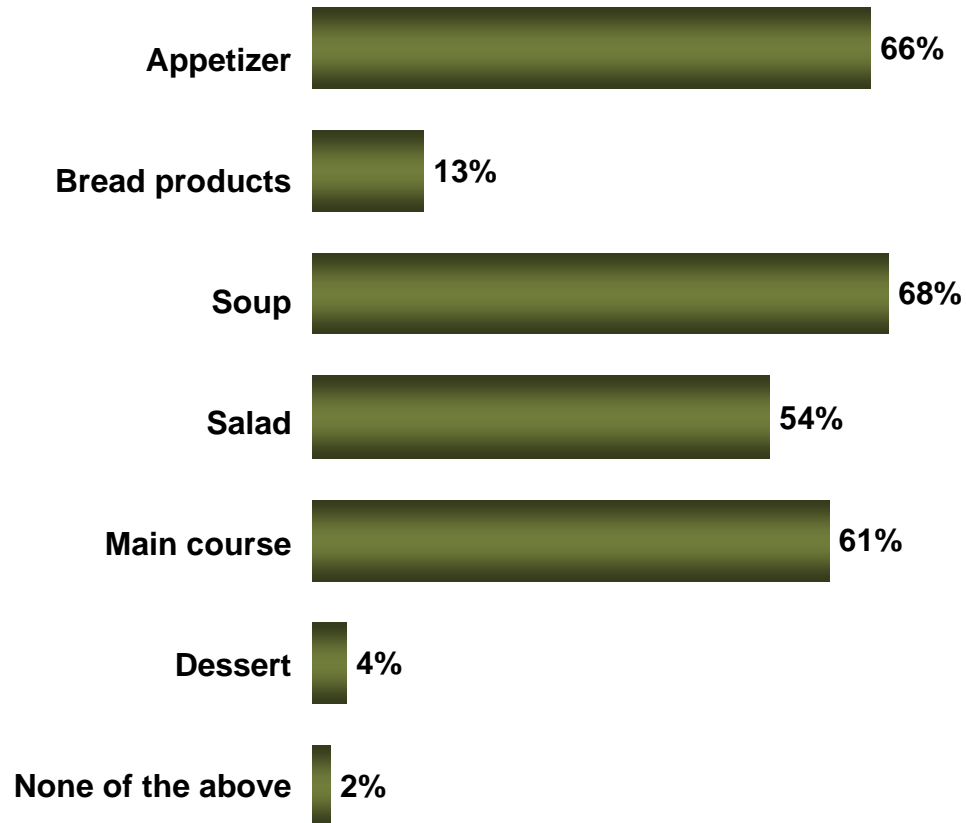
Base: Past 6 months pulse consumption at a restaurant (n=112)



Types of Pulse Dishes Consumed at Restaurants

Informed Champions

Q19. What types of dishes made with pulses do you typically eat at restaurants?



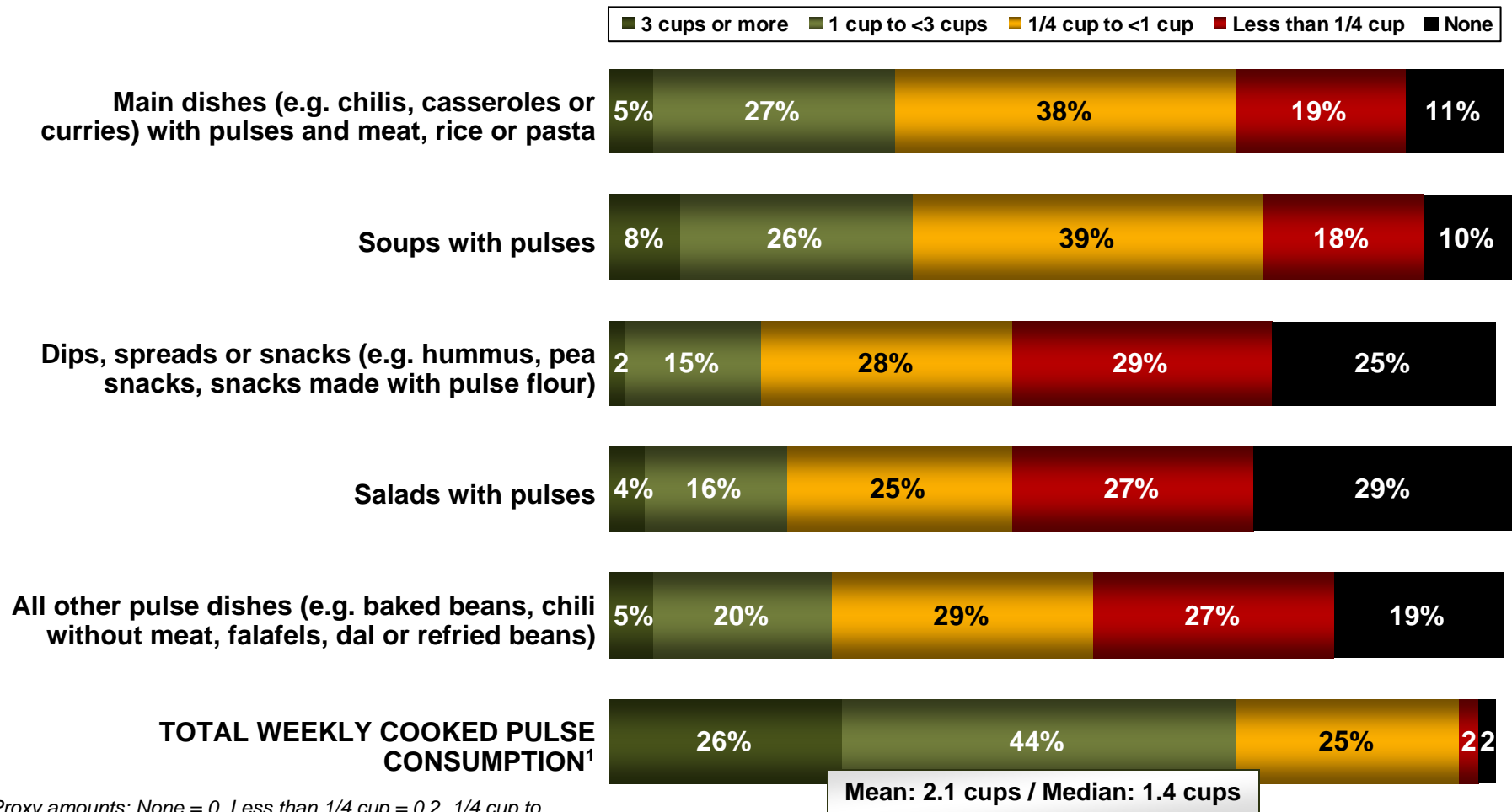
Base: Past 6 months pulse consumption at a restaurant (n=112)



Weekly Cooked Pulse Consumption

Informed Champions

Q20. Thinking about a typical week, approximately, how many total cups of prepared foods that include pulses (beans, peas, lentils or chickpeas) would you eat? Please consider all locations (at home, in restaurants) and all forms (soups, chilis, dips, snacks).



¹Proxy amounts: None = 0, Less than 1/4 cup = 0.2, 1/4 cup to <1 cup = 0.5, 1 cup to <3 cups = 2.0, 3 cups or more = 3.0
 Conversions: Main dishes = 0.4, Soups = 0.3, Dips or spreads = 1.0, Salads = 0.3, All other pulse dishes = 0.9

Base: All respondents (n=223)



Pulse Consumption: Motivators and Barriers

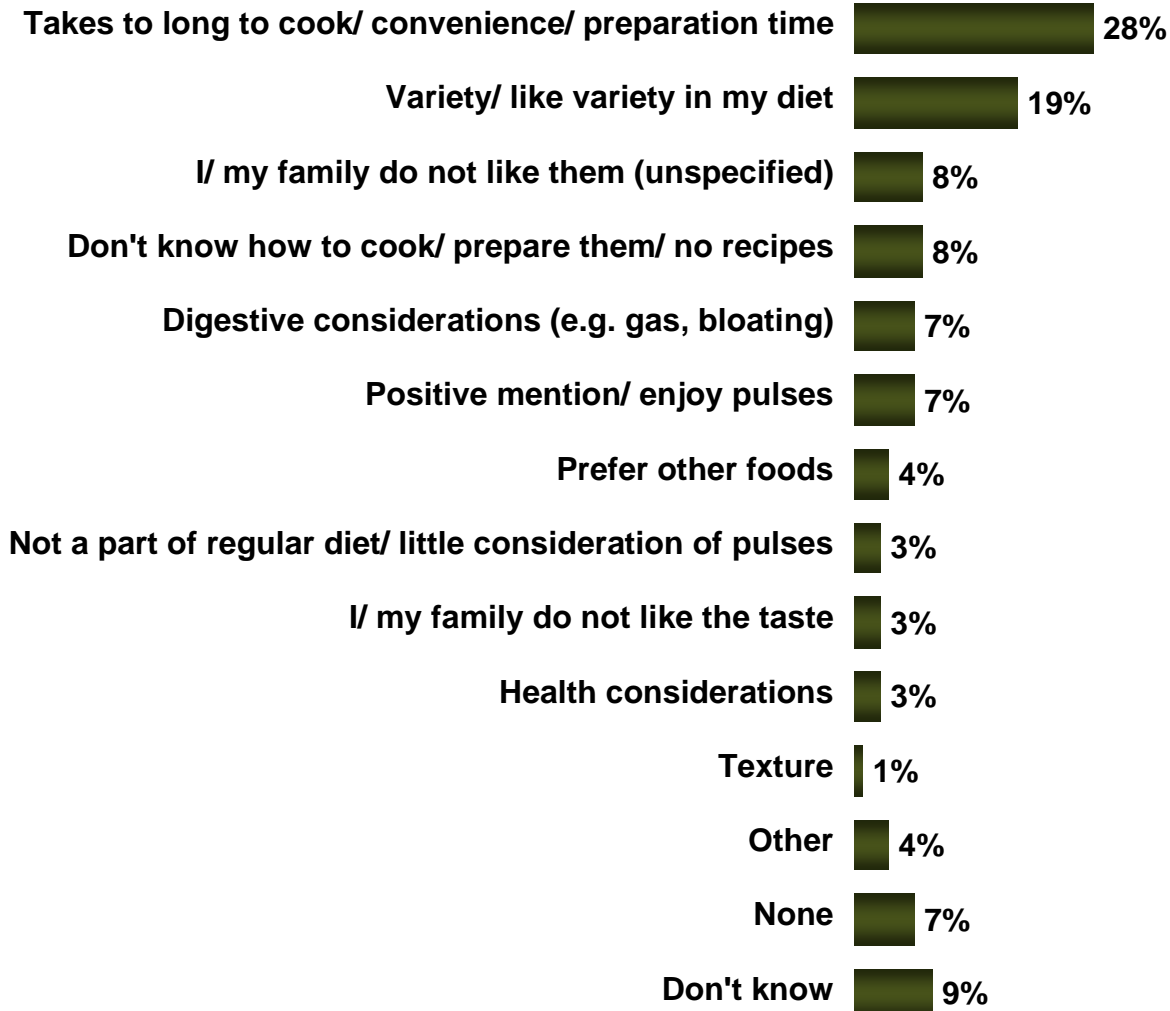




Reasons for Not Eating Pulses More Often

Informed Champions

Q23. What are the main reasons you don't eat pulses more often (dry beans, peas, lentils and chickpeas)?



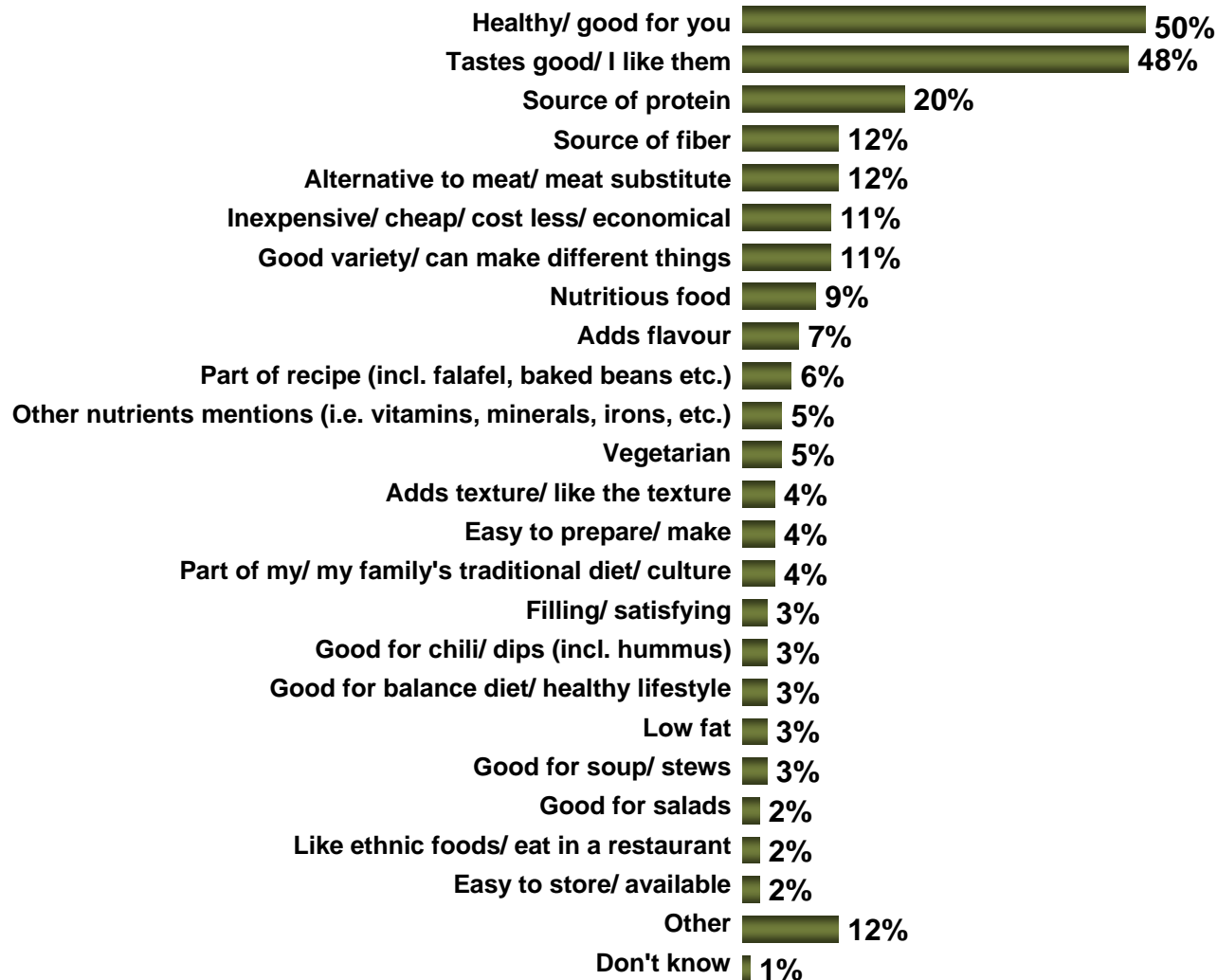
Base: Light consumers (n=110)



Reasons for Eating Pulses

Informed Champions

Q22. What are the main reasons you eat pulses (dry beans, peas, lentils and chickpeas)?



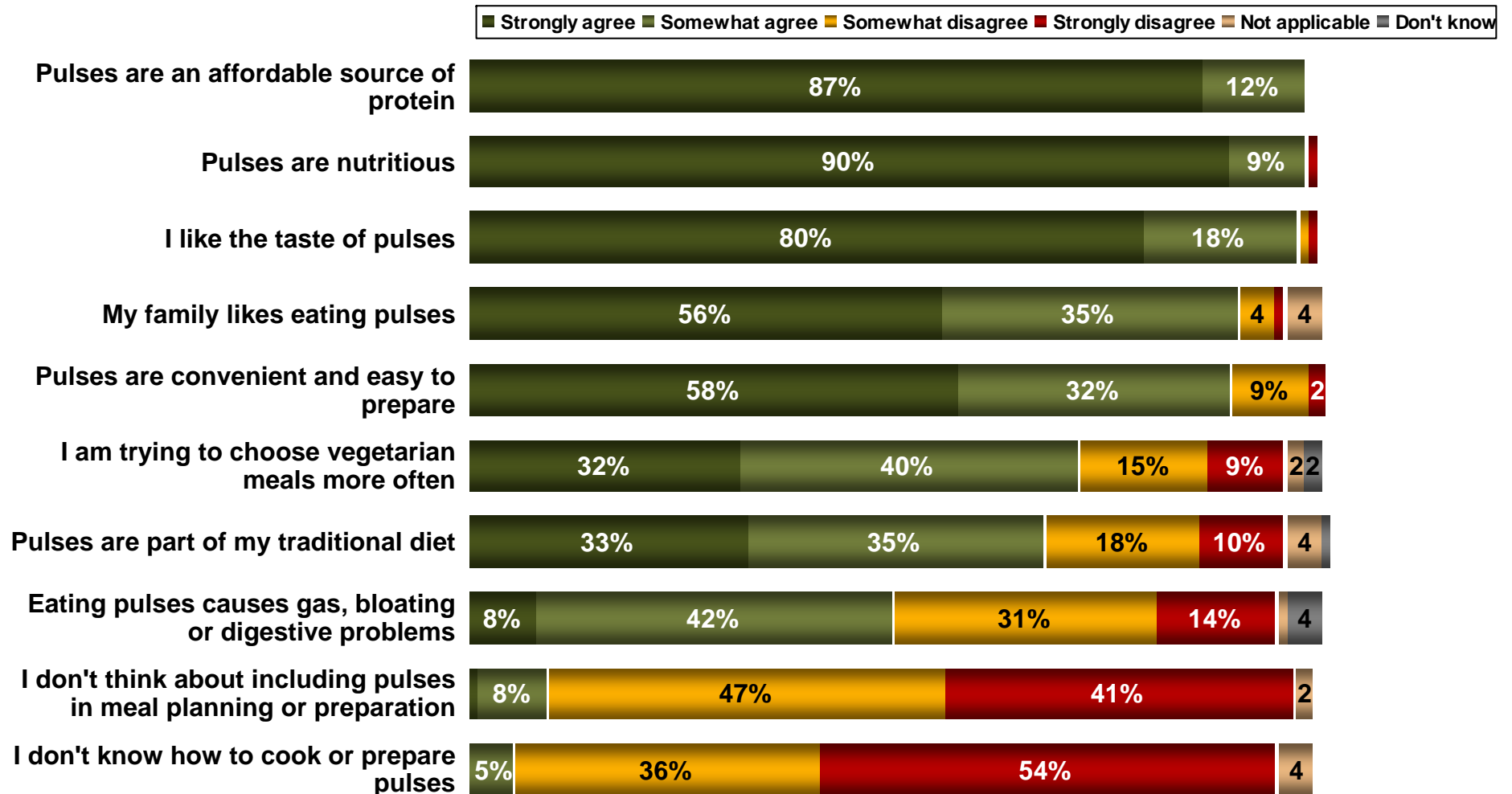
Base: Light, moderate and heavy consumers (n=222)



Attitudes Regarding Pulses

Informed Champions

Q24. Please indicate your agreement or disagreement with the following statements.



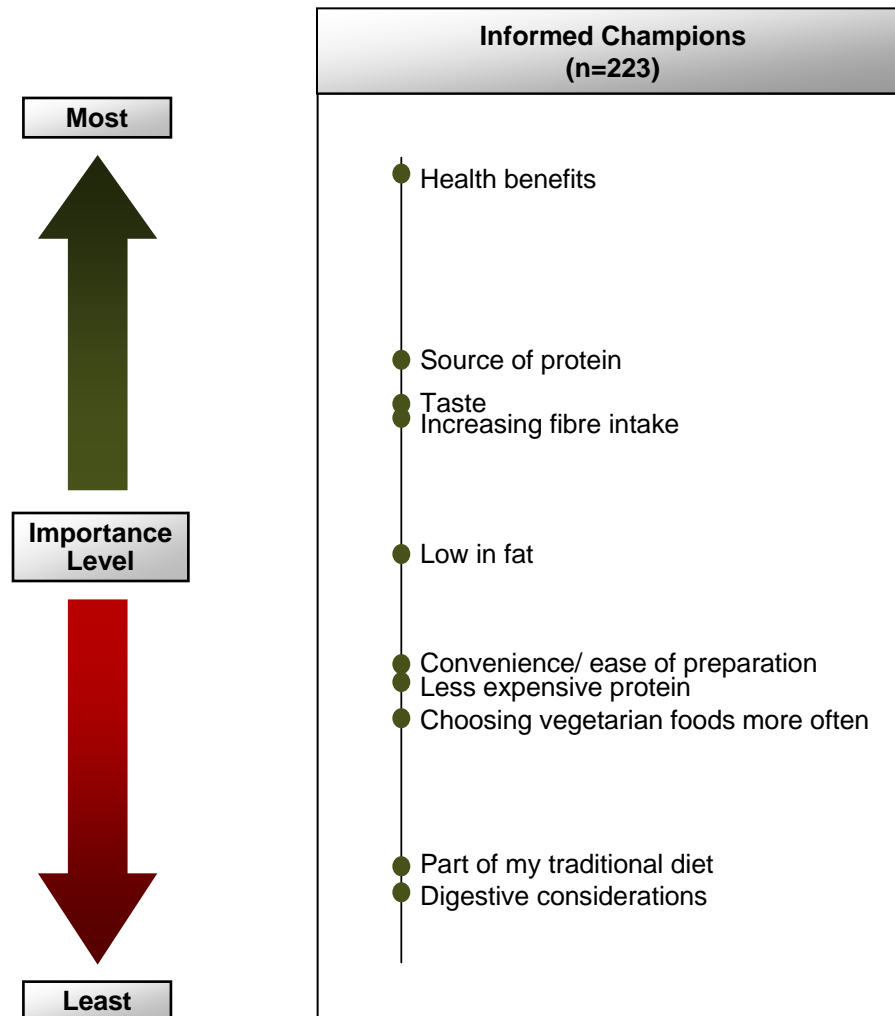
Base: All respondents (n=223)



Importance of Factors for Pulse Consumption

Informed Champions

Q25. Which of the following factors is most important to you and least important to you when deciding whether or not to eat pulses?

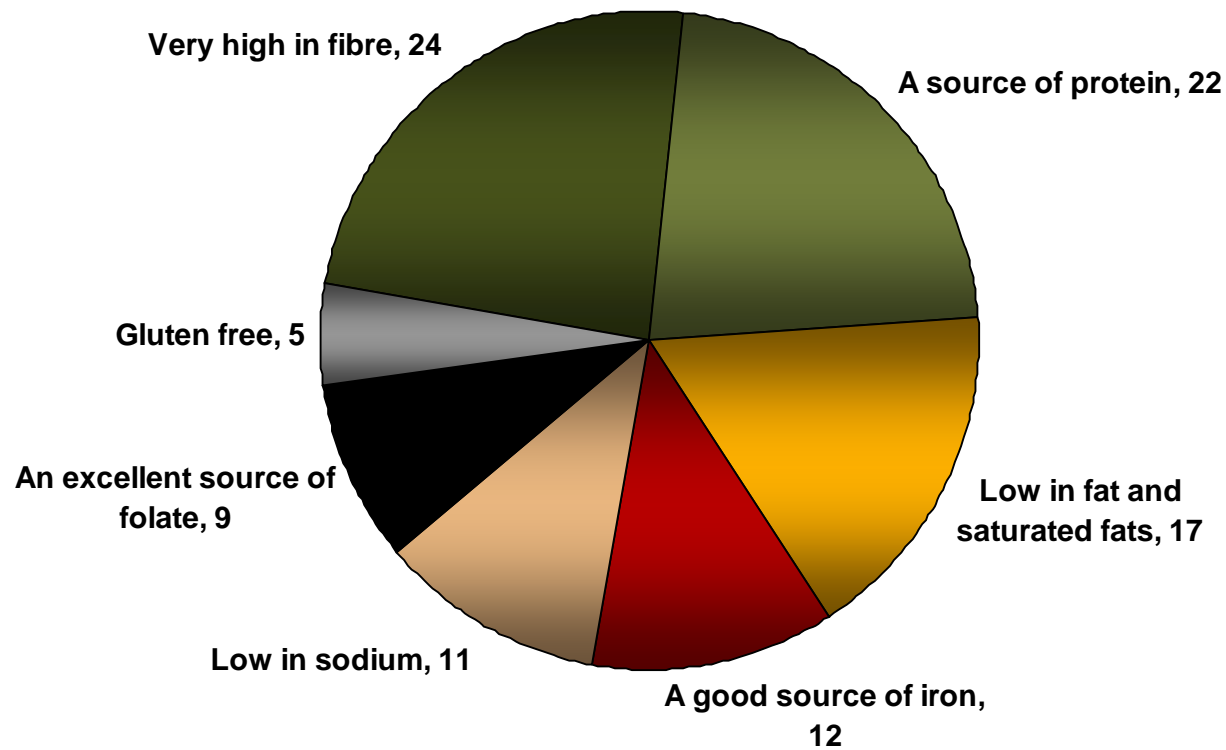




Nutritional Information Influencing the Purchase of a Processed Pulse Product

Informed Champions

Q26. To what degree would each of the following factors influence your decision to purchase a processed food product containing pulses? The product could be a number of things such as pasta, crackers, cereal or a snack item. Please assume you have 100 points and can allocate 0 to 100 points to each factor.



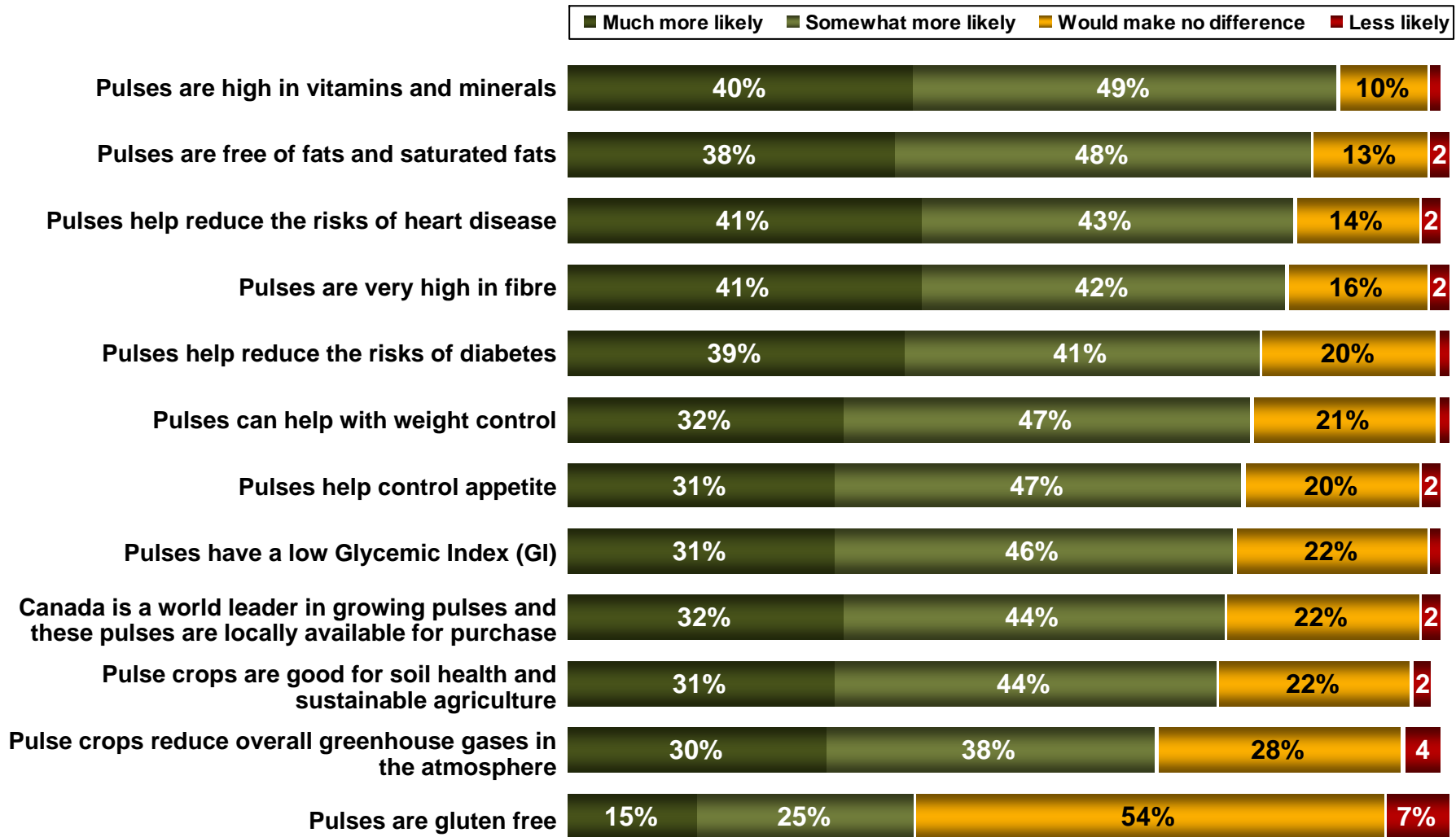
Base: All respondents (n=223)



Influence of Information on Eating Pulses

Informed Champions

Q28. What follows are some facts about pulses, relating to personal health and the environment. Please indicate if knowing this information would make you more likely or less likely to eat pulses and pulse products.



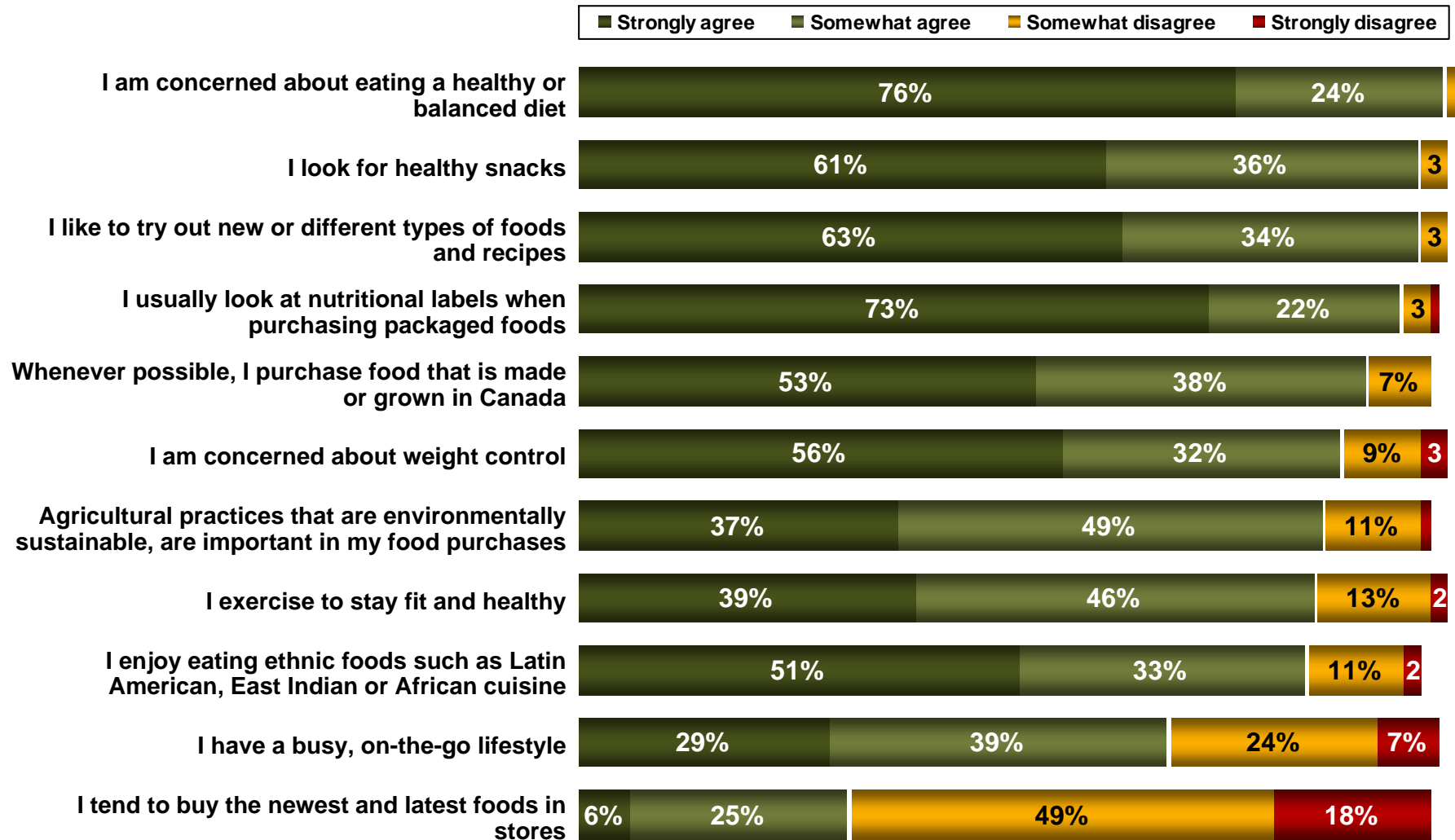
Base: All respondents (n=223)



Attitudes Towards Food and Health

Informed Champions

Q27. Please indicate your agreement or disagreement with the following statements.



Base: All respondents (n=223)



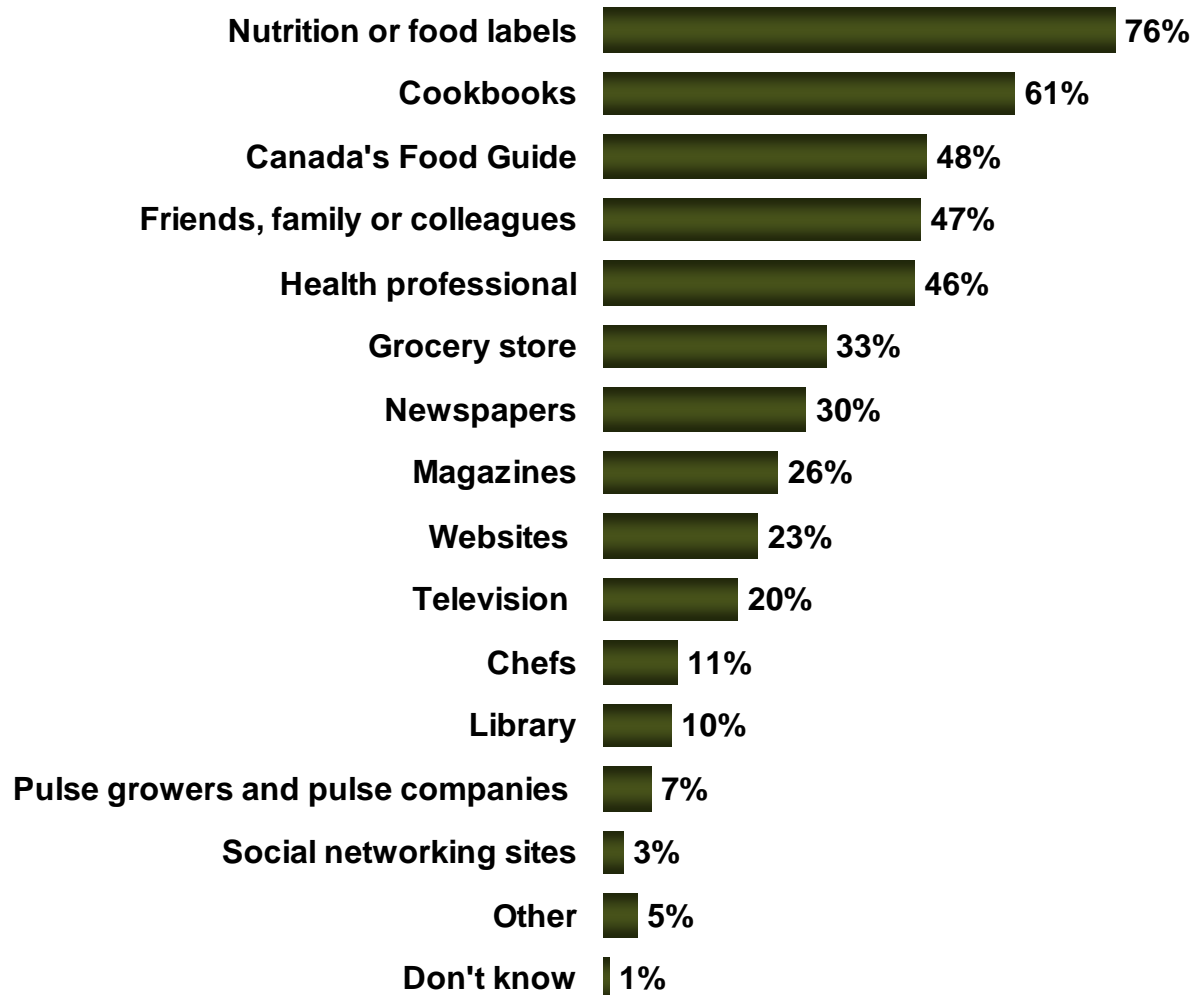
Pulse Consumption: Information Sources





Information Sources for Healthy Eating Informed Champions

Q29. Where do you typically get your information on healthy eating?

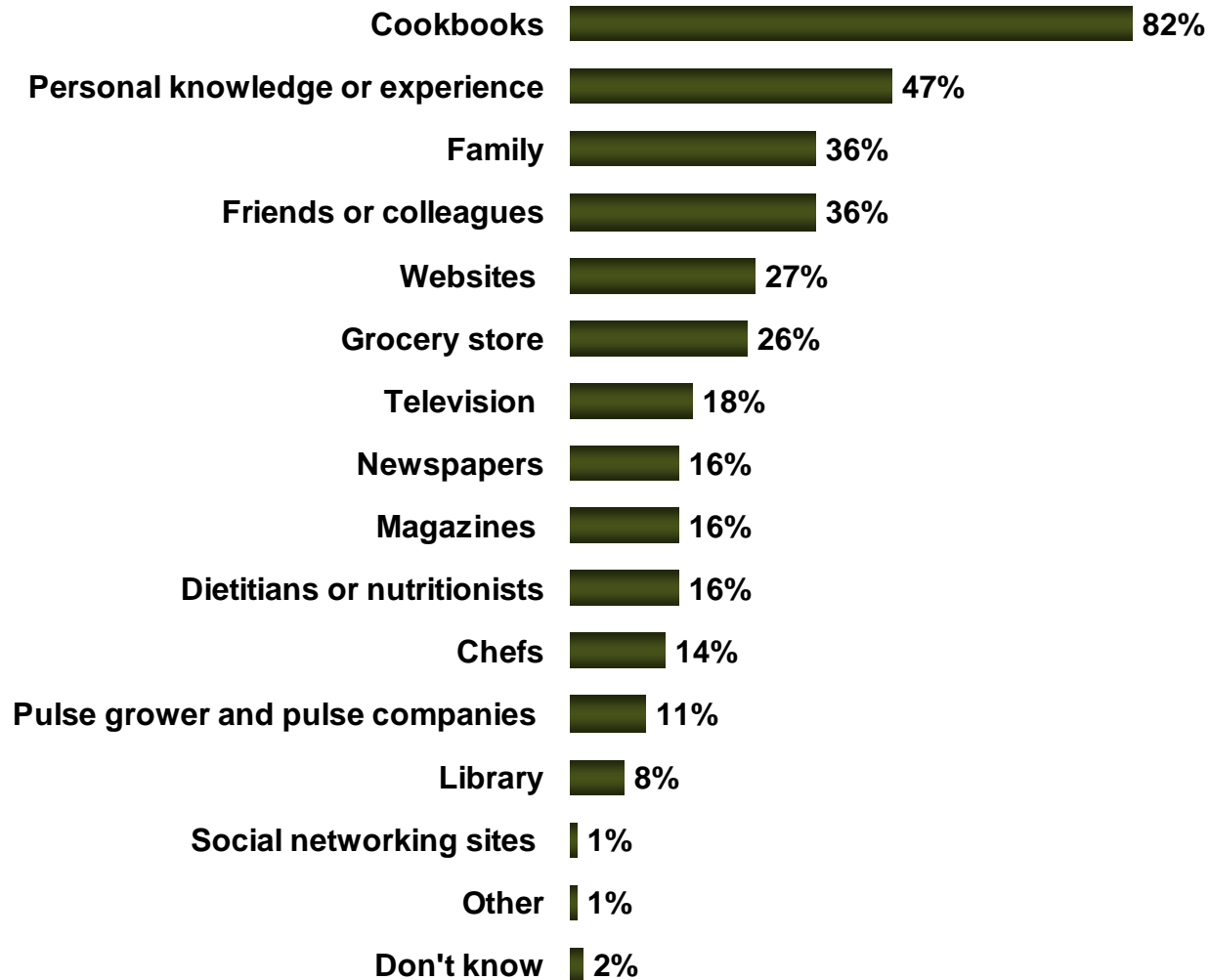


Base: All respondents (n=223)



Information Sources for Preparing Pulses Informed Champions

Q30. Where do you typically get your information about preparing pulses?



Base: All respondents (n=233)



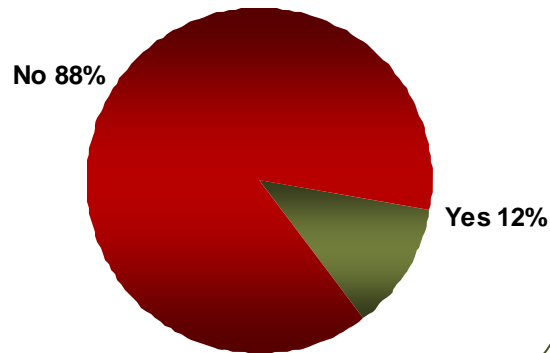
Respondent Characteristics: Health Profile and Demographics



Health Profile

Informed Champions

Vegetarian or Vegan



Incidence of Disease

Heart disease or high blood cholesterol levels	26%
Diabetes	17%
Celiac disease	3%
None of the above	67%
Decline to respond	1%

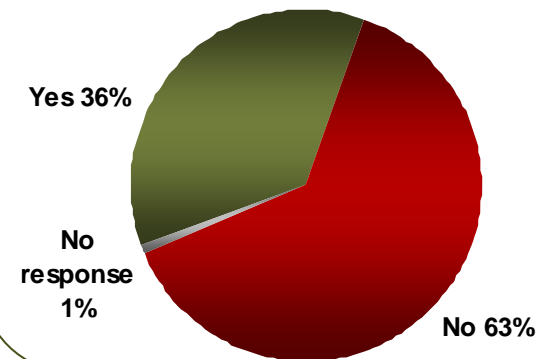
Reported Weight

For your height and weight would you say you are...?

Very underweight	1%
Somewhat underweight	1%
Average weight	46%
Somewhat overweight	46%
Very overweight	7%
Decline to respond	-

Advised about Weight

Have you (or family members in your household) been advised by a health professional that your weight may cause health problems now or in the future?



Base: All respondents (n=223)



Tenure in Canada and Ethnic Background

Informed Champions

Tenure in Canada

Born and raised	84%
More than 20 years	12%
11 to 20 years	1%
6 to 10 years	2%
5 years or less	2%

Base: All respondents (n=223)

Age Left Country of Birth

Under the age of 12	56%
12 to 17	10%
18 or older	30%
Decline to respond	4%

Base: Not born and raised in Canada (n=35)

Ethnic Background

As you know, we all live in Canada, but our ancestors come from many different ethnic backgrounds. What is the main background of your ancestors?

British	38%
European	29%
Canadian	24%
Aboriginal/First Nations	3%
Other	3%
Decline to respond	3%

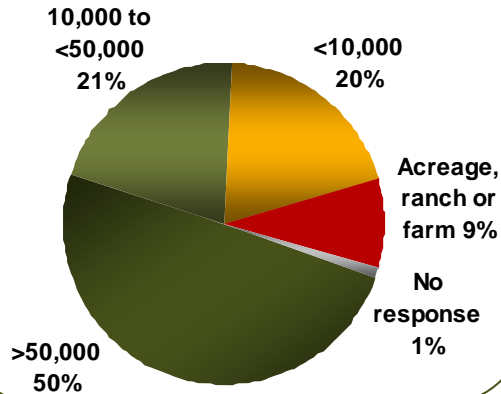
Base: All respondents (n=223)



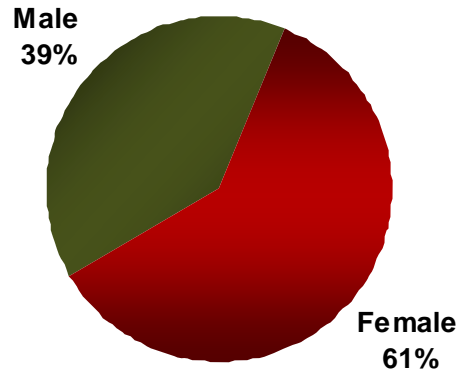
Demographics

Informed Champions

Size of City or Town



Gender



Age

Age Group	Percentage
18 to 24 years	6%
25 to 34 years	20%
35 to 44 years	11%
45 to 54 years	27%
55 to 64 years	22%
65 years or older	13%
Decline to respond	1%
<i>Mean</i>	<i>48</i>

Household Size

Household Size	Percentage
1 person	15%
2 people	53%
3 people	14%
4 or 5 people	14%
6 or more people	3%
Decline to respond	1%

Education

Education Level	Percentage
High school or less	18%
Some university, /college/ post secondary technical	24%
Graduated college/ post secondary technical	24%
Completed university undergraduate degree	23%
Completed university post graduate degree	11%
Decline to respond	1%

Income

Income Bracket	Percentage
Less than \$30,000	13%
\$30,000 to just under \$60,000	30%
\$60,000 to just under \$100,000	26%
\$100,000 or more	17%
Decline to respond	15%

Base: All respondents (n=223)



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