Ipsos

Ipsos Reid

Ag-West Bio

Healthy Foods & Ingredients: Surveying the Canadian Consumer

Ag-West Bio

Saskatchewan Food Industry Development Centre Inc.

Agriculture Council of Saskatchewan Inc.

Agriculture and Agri-Food Canada | Agriculture et Agroalimentaire Canada

Manitoba Harvest hemp foods

Saskatoon Regional Economic Development Authority

vineland Research & Innovation Centre

STEP Saskatchewan Trade & Export Partnership

University of Saskatchewan College of Pharmacy & Nutrition

SaskCanola

Administering the survey …

- Follow-on survey from December 2012 survey
  - Select number of new questions
- Conducted by Ipsos Reid in March 2015
- On-line survey
- 2201 Canadians surveyed - representative of population

	British Columbia	Alberta	Saskatchewan /Manitoba	Ontario	Quebec	Atlantic	Total Canada
Number of Interviews	N=296	N=234	N=142	N=844	N=528	N=157	2,201

- Full survey information:
  - Total Canadian percentages
  - By province
  - By age category

Survey Explored Canadians' Perceptions

- Specifically the research was designed to develop a deeper understanding of:

  - Perceptions of food and dietary health;
  - Consumption of healthy foods, ingredients and natural health products;
  - Preference of product attributes, claims, ingredients & other factors in the food purchase decision;
  - Current household health concerns
  - Specific foods & ingredients sought for added health benefits;
  - Retail locations for the purchase of healthy food, ingredients and natural healthy products;
  - Sources of information for healthy food, ingredients and natural healthy products; and
  - Explore trends in the market

Canadians' Connection Between Food and Health

Canadians are eating for wellness

- 85% of Canadians connect the food they are eating with health

- More Canadians have made changes to diet for general health and well-being rather than specific health benefit:
  - General health and well-being = 65%
  - Specific health concerns = 39%

Perceptions of Food & Dietary Health– Region

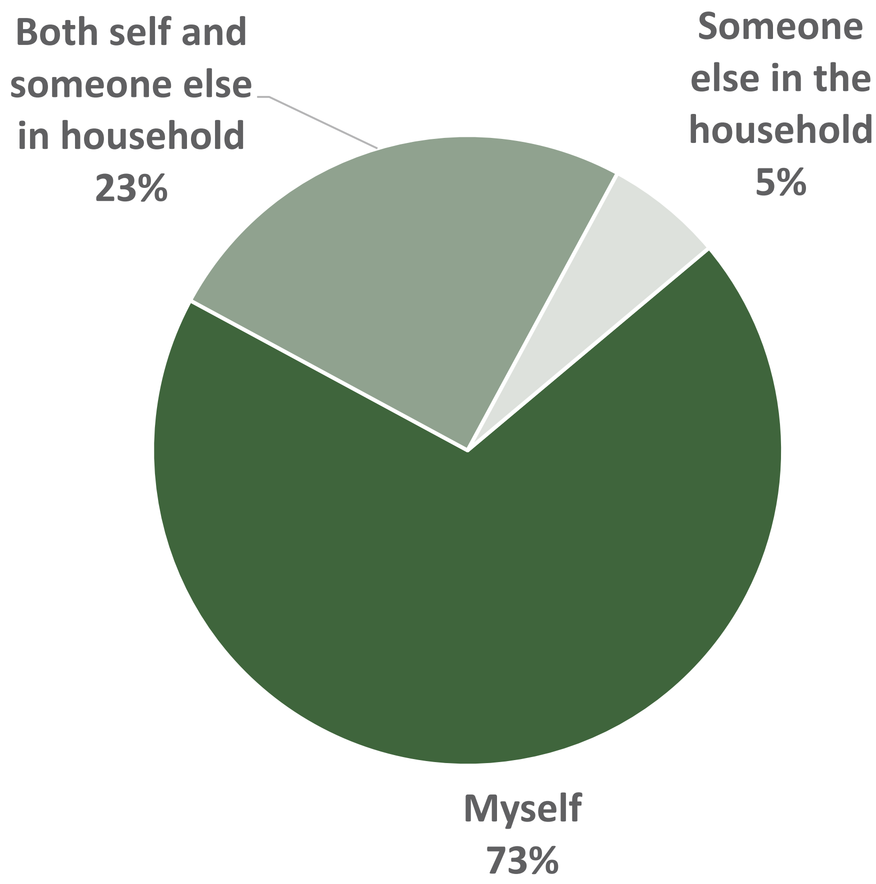
	% Agree, Rated 4 or 5						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
I believe the foods and beverages I consume affect my health	85%	87% F	84%	83%	87% F	80%	87%
I have made changes to my diet for general overall health and well-being	65%	69% F	66% F	64%	67% F	56%	69% F
I seek out foods with fewer, simpler ingredients	59%	63% DF	56%	52%	62% DF	54%	63%
I have made changes to my diet because of a specific health concern	39%	44% F	39% F	38% F	43% F	26%	49% F

BCDEFG: Significantly higher than sub-group represented by that letter.

Base: All respondents (n=2,201)

QA1. On a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please indicate your agreement or disagreement with the following statements:…

Change in diet is personal

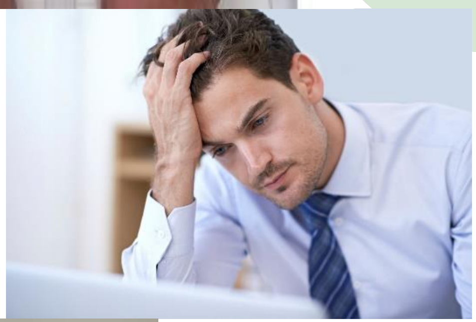


Have you made changes to your diet because of a specific health concern related to you or someone else in your household? (850 respondents)

Canadians' lifestyles are out of sync with health and well-being

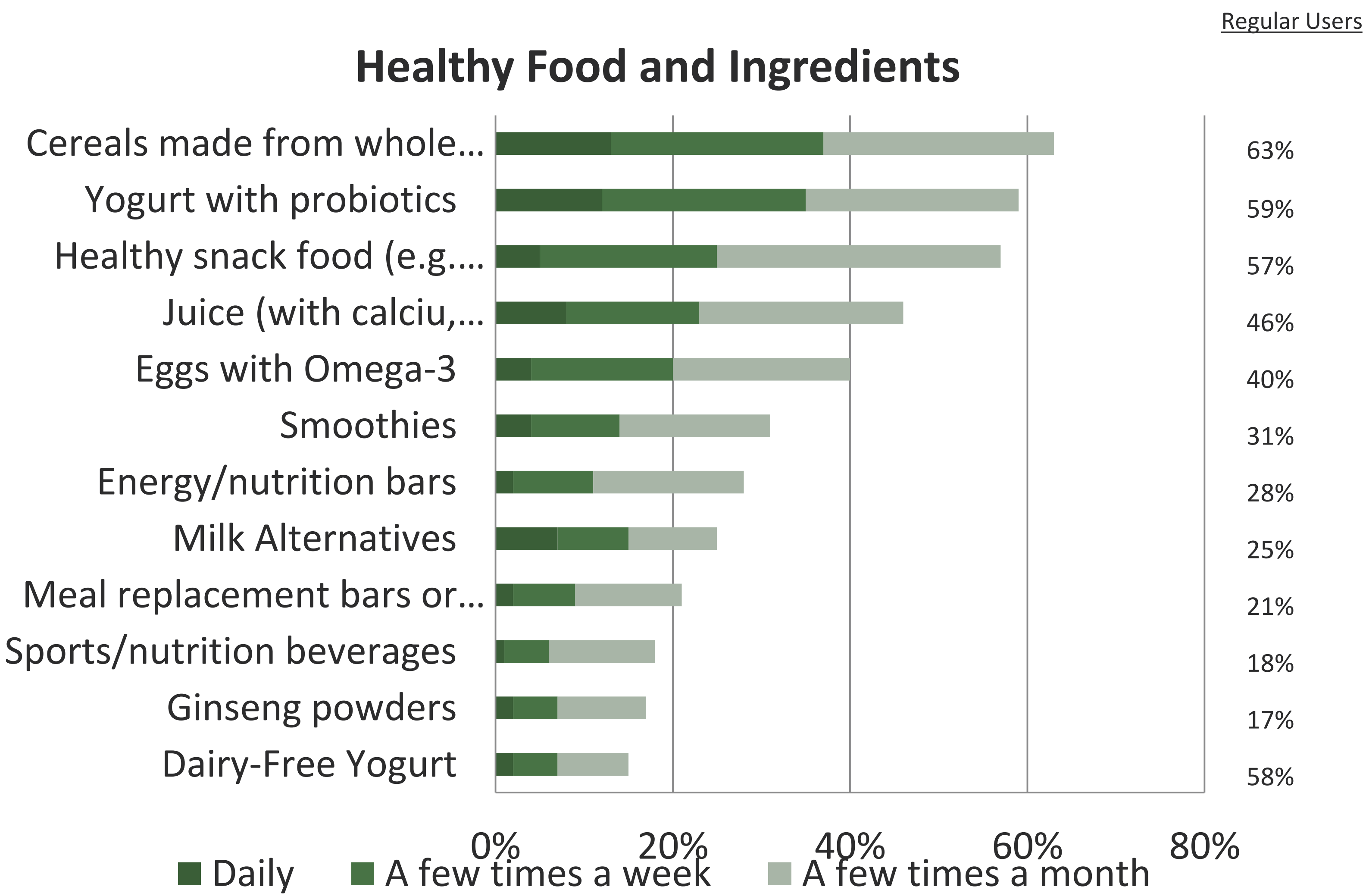
- Top health issues:

  - **63%** Weight loss/management
  - **58%** Bone/joint health
  - **57%** Stress
  - **56%** Sleep



What Do Canadians Want in their Food?

Snacking gains strength for Canadians



Base: All respondents (n=2,201)

QC2. Which of the following best describes how often you consume each of the following products?

Specific Foods/Ingredients Sought for Added Health Benefits – Region

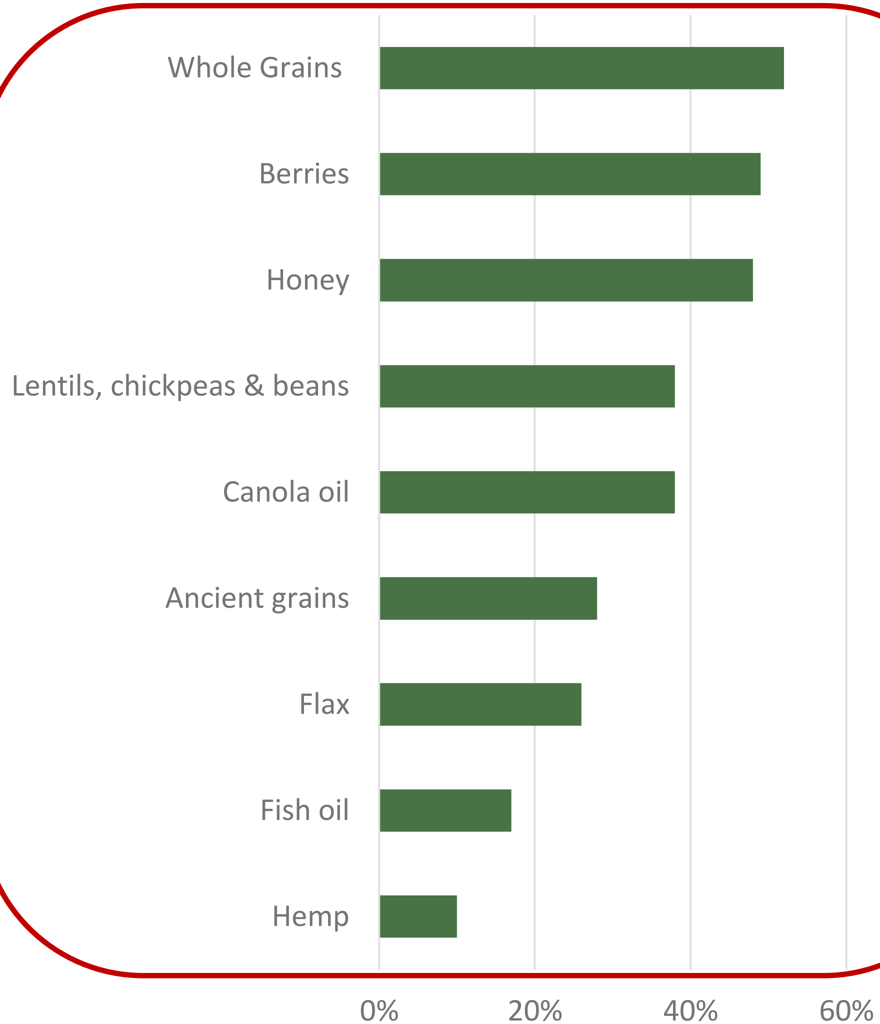
	% Yes						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Whole grains	52%	59% EF	52%	50%	50%	50%	57%
Berries (Saskatoon berries, blueberries)	49%	55% F	54% F	51%	50% F	43%	46%
Honey	48%	46%	49%	42%	47%	54% BDEG	44%
Lentils, chickpeas and beans	38%	38% CDG	24%	26%	42% CDG	46% BCDG	28%
Canola Oil	38%	33%	43% BE	45% BE	32%	46% BE	37%
Ancient grains such as buckwheat, rye and quinoa	28%	33% FG	27%	26%	30% G	25%	19%
Flax (seed, oil)	26%	28%	27%	24%	27%	23%	27%
Fish oil	17%	17%	20% F	12%	19% DF	13%	21% F
Hemp (seed, oil, hemp hearts, milk, protein powder)	10%	17% EFG	12% F	10%	11% F	7%	7%
Ginseng	8%	10% DG	8% D	2%	8% D	8% D	4%
I don't use of the above	16%	13%	14%	23% BCF	17%	14%	18%

BCDEFG: Significantly higher than sub-group represented by that letter.

Base: All respondents (n=2,001)

QC3. Do you regularly use any of the following foods or ingredients specifically because of their added health benefits?

Canadians are purchasing specific foods or ingredients because of health benefits provided



Regular usage increases with age

QC3. Do you regularly use any of the following foods or ingredients specifically because of their added health benefits?

Understanding Canadians' food prep knowledge versus purchase habits

	Purchased 3 or more times in last year	At Least some knowledge about use in meals
Quinoa	20%	54%
Dry beans	21%	62%
Chick peas	32%	67%
Lentils	23%	61%
Flax	15%	50%
Barley	14%	60%
Dry Peas	14%	56%
Raw shelled hemp seeds	6%	25%

Increasing the knowledge of Canadians may increase its usage

Many functional ingredients are still in demand in the market

Influence of <u>added</u> functional ingredients on food choice:

- **82%** Fibre
- **77%** Vitamins and minerals
- **64%** Antioxidants
- **64%** Probiotics
- **62%** Omega 3

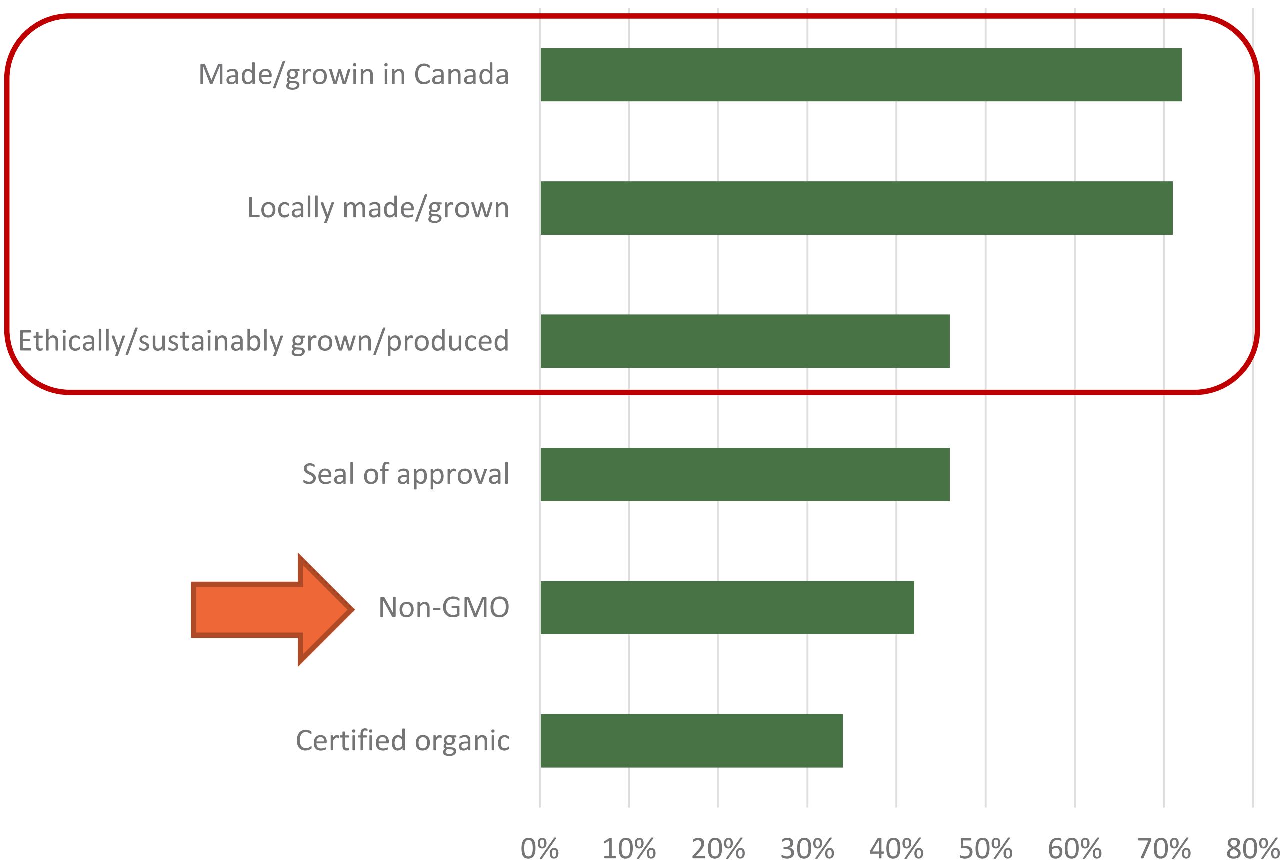
Canadians are looking for health benefits from simpler and whole foods

- **59%** of Canadians seeking out foods with fewer, simpler ingredients

Canadians are looking to connect with their food choices

Attributes or Claims that influence the food purchase decision

More important to Canadians as they age



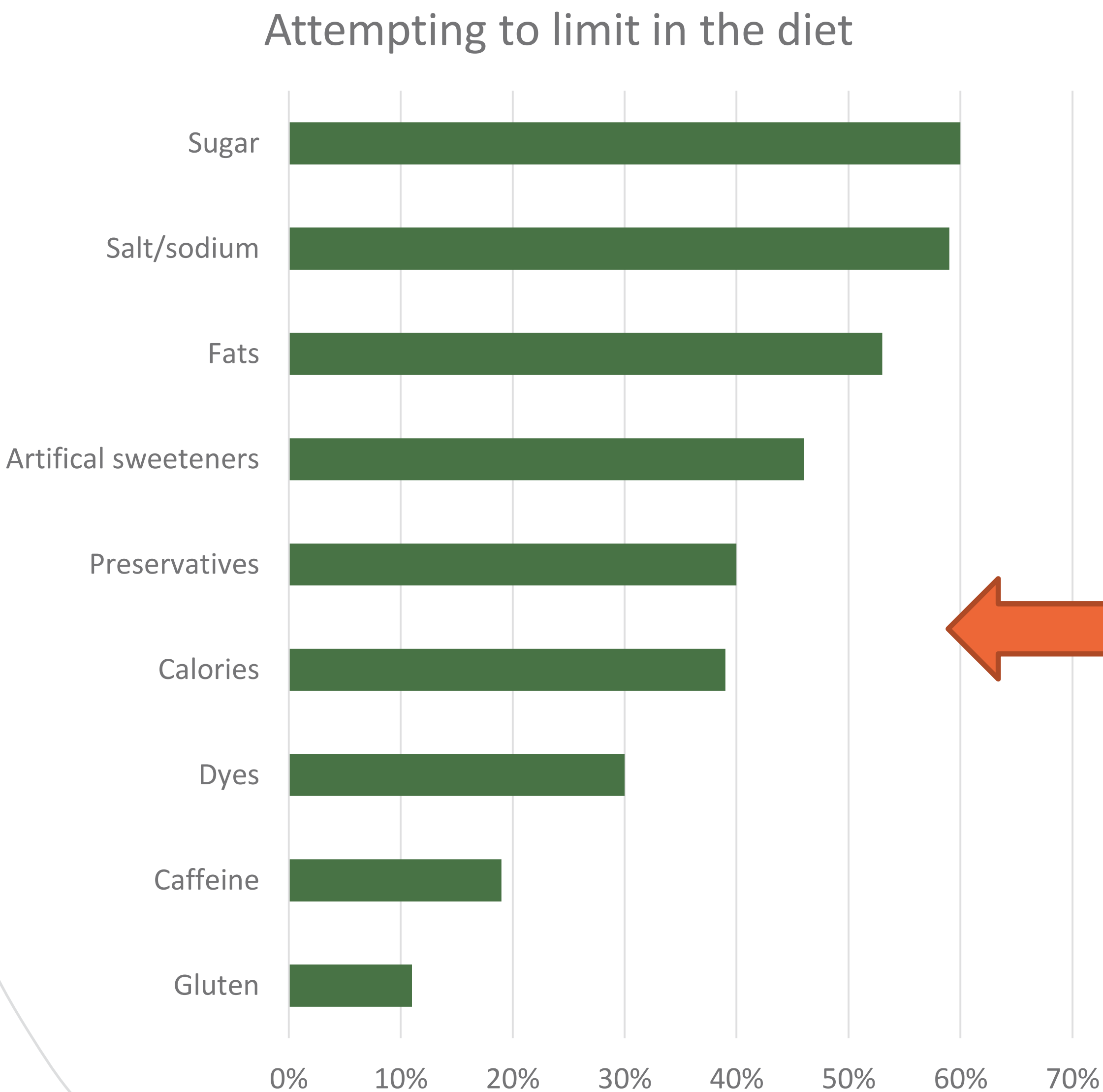
QB6. How do the following product attributes or claims influence your decision to buy a food product?

Canadians are influenced by local but they are also looking at…

- Huge impact on food and beverage purchase decision

  - **98%** Taste
  - **98%** Freshness
  - **96%** Price

What Canadians are omitting…



As Canadians age, they are more likely to reduce specific additives or ingredients in their diet

Weight loss/management most important health issue for 63% of Canadians, but only 39% are trying to limit calories.

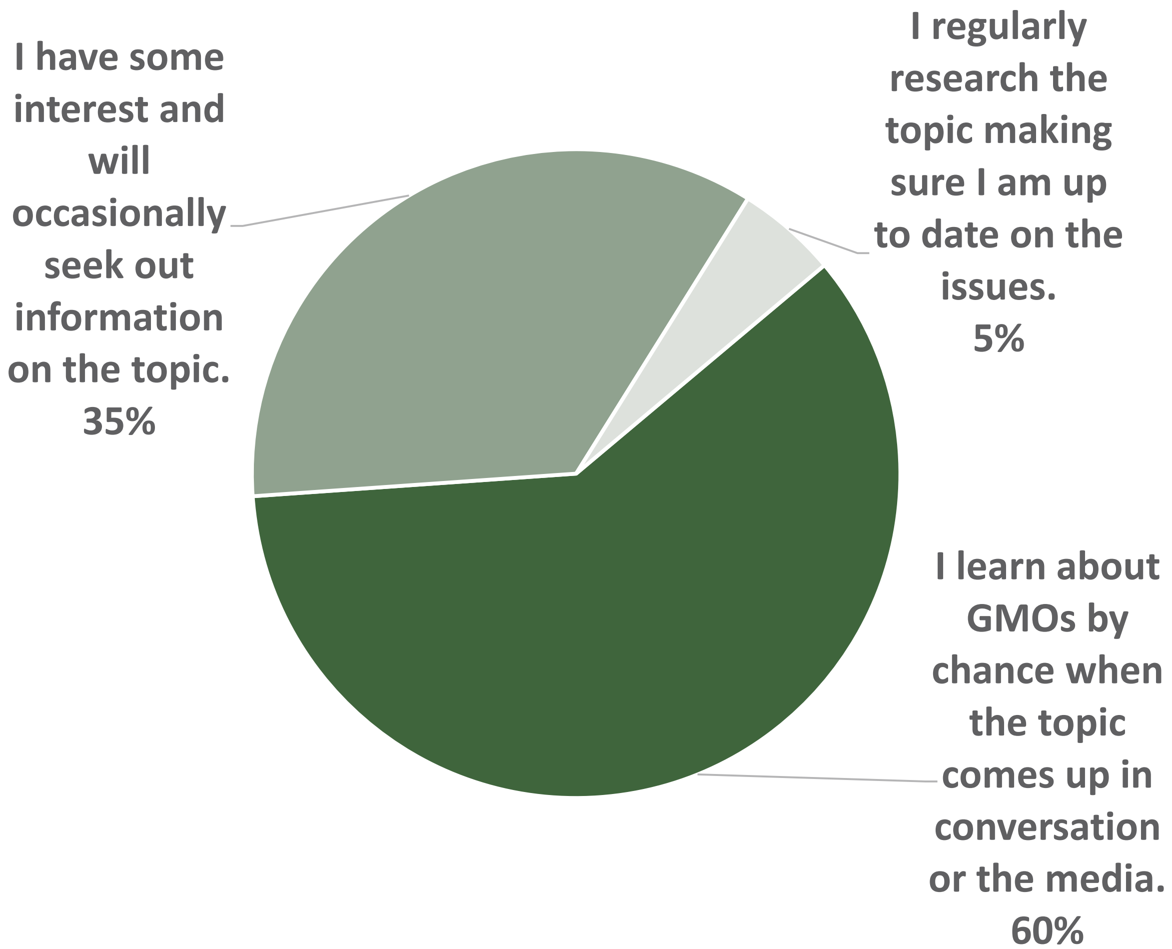
More work needs to be done to build the trust of Canadians in food safety

- **65%** Confident in the safety of the Canadian food supply
- **56%** Concerned about the safety of the foods and beverages they consume

GMO debate is likely being driven more by passion than knowledge

Non-GMO foods are more nutritious than foods containing GMO	33% strongly or somewhat agree
Foods containing GMOs can be part of a healthy diet	30% strongly or somewhat agree
Non-GMO claim influences purchase decision	42% a lot or somewhat more likely to purchase

Media coverage fueling interest in GMOs?



Base: All respondents (n=2,001)

QA4. Which of the following describes how you learn about GMOs or genetic engineering?

Make it easy for Canadians to connect with the food they eat

Tell your story – be transparent

What's in the food?

Who made it?

What is the connection to Canada?

Why is it good for me?

Goal → build trust

Where are Canadians Shopping for Healthy Food?

Canadian women still doing the majority of the grocery shopping…

- About a quarter of households share responsibility for grocery purchases

- More women than men still doing all or most of the household grocery shopping:
  - **71%** of all households have one person who does all or almost all of the grocery shopping
  - **58%** women – do all or almost all of grocery shopping
  - **42%** men – do all or almost all of grocery shopping

Grocery stores are the mainstay for Canadians purchasing healthy food, beverages and ingredients

Top three places where Canadians regularly shop:

- **85%** At grocery stores
- **48%** At mass retailers (e.g. Costco, Walmart)
- **27%** At farmers' markets

Where are Canadians Getting Their Information?

Canadians access multiple sources to gain information on healthy eating

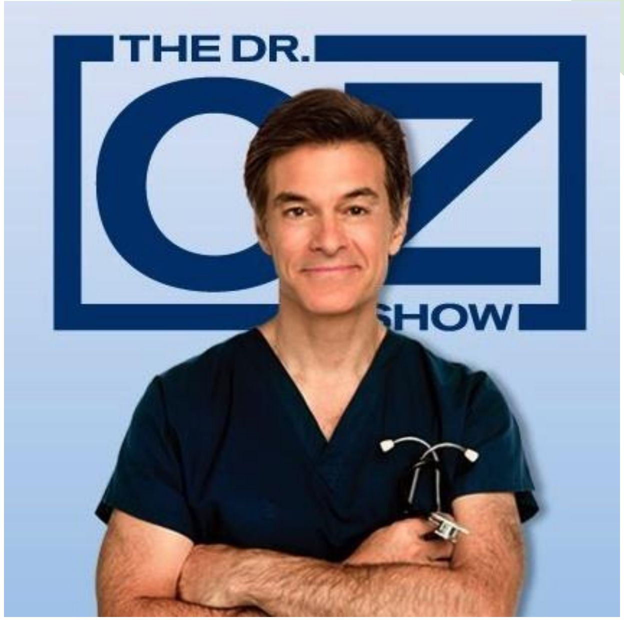
- Top four sources:
  - **47%** On-line/internet
  - **43%** Friends or family
  - **35%** Health professionals
  - **28%** Magazine or newspapers

- Older Canadians (45+) more likely to seek information from:
  - Health professionals
  - Magazine or newspaper
  - Consumer wellness show

Consumer Information Sources - Familiarity

As a source of information for food, Canadians very or somewhat familiar with:

- **30%** Dr. Oz
- **9%** Canadian Organic Trade Association
- **8%** The International Food Information Council
- **8%** Farm & Food Care
- **7%** Canadian Biotechnology Action Network



Don’t forget your consumers’ biggest source of information

93% Read nutrition facts panel

90% Read ingredient list

INGREDIENTS: Almonds, pumpkin, organic coconut nectar, arrowroot powder, cinnamon, nutmeg, ginger, allspice, cloves, organic vanilla beans, baking soda, celtic sea salt.

Nutrition Facts

Serving Size ½ cup (114g)
Servings Per Container 4

Amount Per Serving	
Calories 90	Calories from Fat 30
	% Daily Value*
Total Fat 3g	**5%**
Saturated Fat 0g	**0%**
Cholesterol 0mg	**0%**
Sodium 300mg	**13%**
Total Carbohydrate 13g	**4%**
Dietary Fiber 3g	**12%**
Sugars 3g	
Protein 3g	

Vitamin A 80% • Vitamin C 60%
Calcium 4% • Iron 4%

*Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your caloric needs:

	Calories:	2,000	2,500
Total Fat	Less than	65g	80g
Sat Fat	Less than	20g	25g
Cholesterol	Less than	300mg	300mg
Sodiuum	Less than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

Calories per gram:
Fat 9 • Carbohydrate 4 • Protein 4

Canadians are connected …
however the connection has not yet resulted in significant on-line purchasing

- **47%** Search on-line for product information (top source)
- **18%** Us their smart phones for product information when grocery shopping
- **3%** Buy food on-line

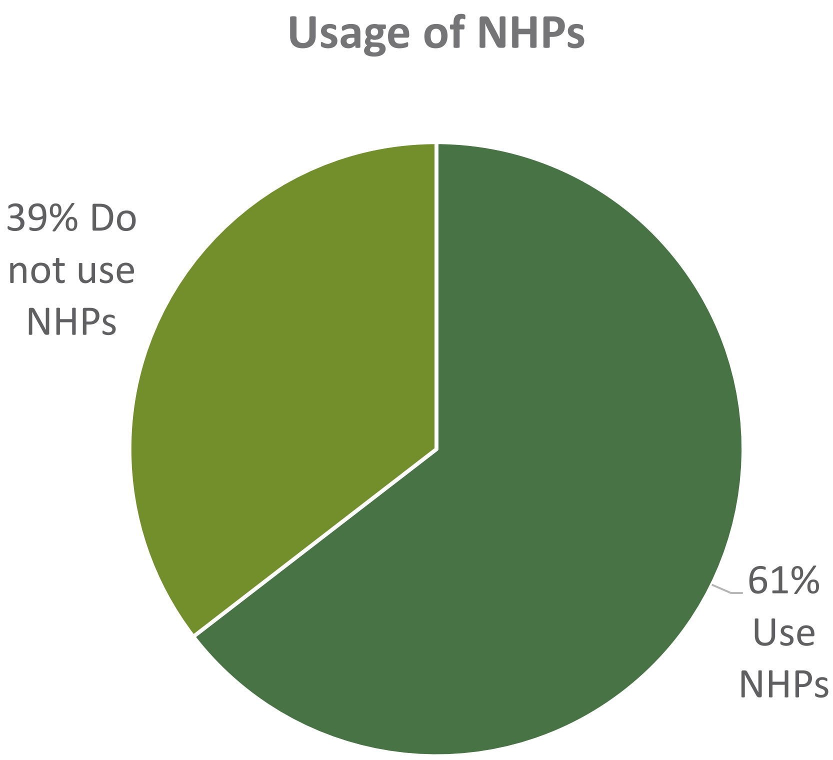
But retailers are getting on board

save on foods

(Loblaws)

Consumption of Natural Health Products

The majority of Canadians consume natural health products



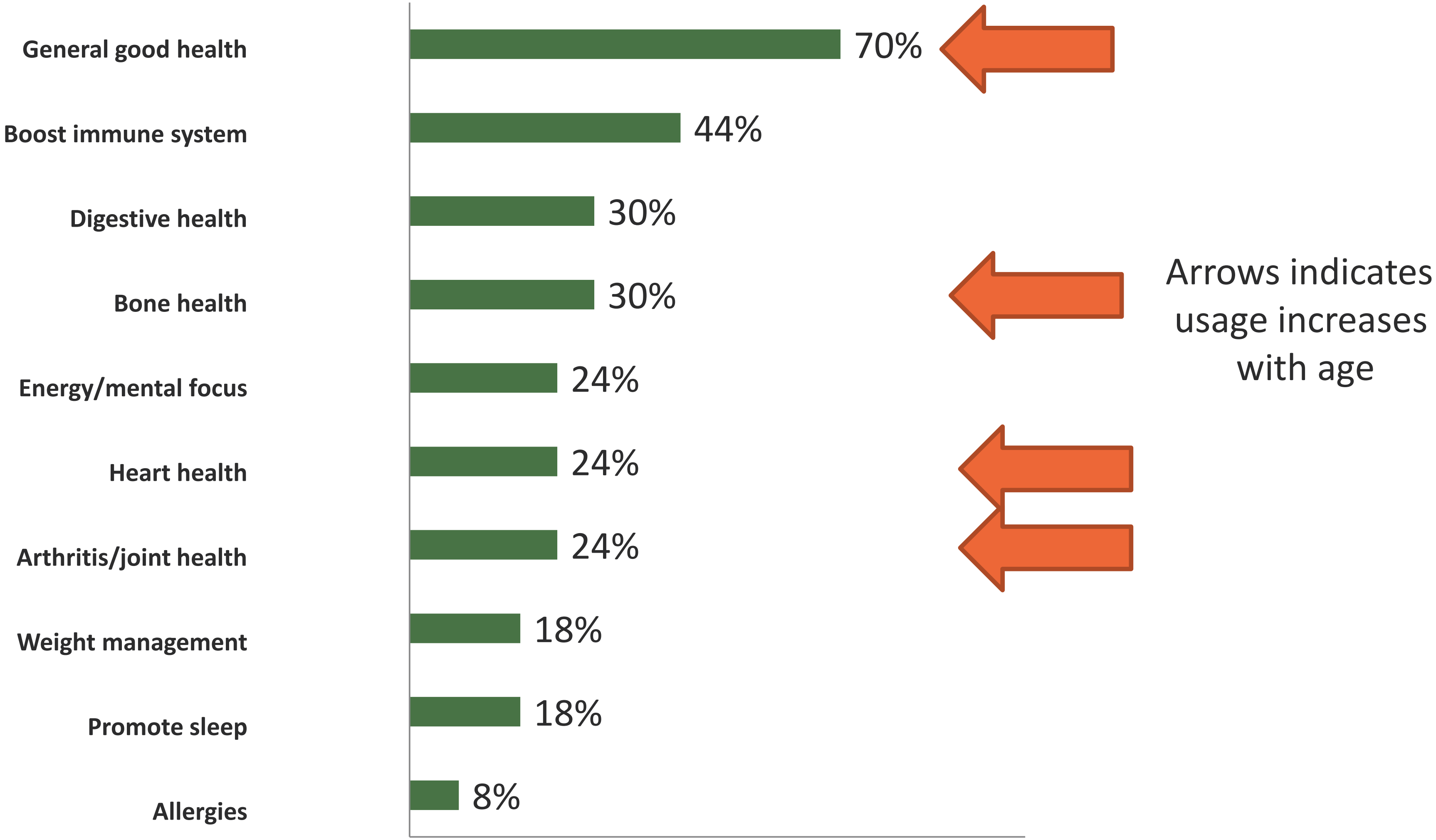
22% - Daily users

14% - Weekly users

8% - Monthly users

16% - Seasonal users

Canadians are consuming natural health products for health and well being



Base: Among those who have used natural health products (n=1,213)

QF3. Why do you take vitamins, minerals or natural health products? Select all that apply.

Types of Natural Health Products Used – Age

	% Ever Used				
	Total (n=1,351)	18 to 34 (n=389) (H)	35 to 44 (n=236) (I)	45 to 54 (n=270) (J)	55 to 65 (n=456) (K)
Vitamins/minerals	70%	62%	67%	73% H	75% HI
Calcium	44%	30%	35%	46% HI	58% HIJ
Omega 3/essential fatty acids - fish/marine sourced	38%	30%	30%	41% HI	47% HI
Probiotics	35%	31%	35%	42% H	36%
Cold medicines (i.e. cold-fx)	29%	25%	28%	29%	31%
Echinacea	24%	20%	23%	29% H	24%
Antioxidants	24%	20%	19%	26%	28% HI
Glucosamine	22%	9%	17% H	24% HI	36% HIJ
Omega 3 from plant sources	18%	16%	12%	23% HI	20% I

HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: Among those who have used natural health products (n=1,351)

QF2. Which natural health products, sold in dosage form, have you ever used? Select all that apply.

Types of Natural Health Products Used – Age (cont.)

	% Ever Used				
	Total (n=1,351)	18 to 34 (n=389) (H)	35 to 44 (n=236) (I)	45 to 54 (n=270) (J)	55 to 65 (n=456) (K)
Essential oils	18%	16%	19%	18%	18%
Melatonin	17%	14%	17%	18%	18%
Ginseng	15%	12%	18% H	16%	17%
Protein powder - plant sources	13%	15% K	16% K	14% K	8%
Homeopathic medicines	12%	10%	12%	13%	13%
Protein powder - animal sources	8%	10% K	13% JK	6%	4%
Hemp Oil Capsules	3%	4%	3%	2%	3%
None of the above	5%	7% K	6% K	5%	3%

HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: Among those who have used natural health products (n=1,351)

QF2. Which natural health products, sold in dosage form, have you ever used? Select all that apply.

Purchasing Natural Health Products

NHPs are considered mainstream but grocery stores share the market

Main retail outlets where Canadians shop for NHPs:

- **50%** - Pharmacy/drug stores
- **49%** - Grocery stores
- **43%** - Mass retailers (e.g. Walmart, Costco)
- **29%** - Health food stores

Purchasing Natural Health Products

- Canadians in Alberta (61%) and Saskatchewan-Manitoba (56%) rely on grocery stores for most of their natural health shopping, whereas those in Quebec (63%) buy mostly from pharmacies and drug stores.

- Regardless of age, small number of Canadians are utilizing online retailers as a resource for their natural health purchases (9%).

Key Messages

Key Messages of the Survey

- Canadians are looking for food that will help them achieve a healthy lifestyle
- Most Canadians believe the food and beverages they consume impact their health and two-thirds have made a change to their diet for general health and well-being purposes.
- Consumers facing challenges with major lifestyle health issues: weight loss/management, stress and sleep
- Among Canadians who use natural health products; vitamins/minerals followed by calcium, omega 3/essential fatty acids and probiotics are the products most commonly used. They are primarily used for general health and to boost the immune system.
- Canadians identified items they are limiting; sugar, sodium and fats are the most common items people want to avoid. A large number of consumers also limit artificial sweeteners (46%), preservatives (40%) and calories (39%).

Key Messages of the Survey (continued)

- Product claims that have the most influence on Canadians are: made/grown in Canada and locally made/grown while claims of certified organic and non-GMO currently have less influence on purchase decisions.
  - About a third of Canadians feel certified organic foods are healthier and a third think non-GMO foods are more nutritious than foods containing GMOs.

- Change in diet is personal
  - 77% of Canadian households reported having 3 or more health concerns for themselves or others in their household
  - 65% have made changes for overall health & wellbeing
  - Of those who have made a change to diet due to specific health concerns:
    - 73% have made change to diet because of their own health issues
    - 23% have made change to diet because of their own and someone else's health issue in the household

Questions?

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