Ipsos

Ipsos Reid

BioAccess Commercialization Centre

Canadian Baseline Survey

BioAccess
COMMERCIALIZATION CENTRE

AGRICULTURE COUNCIL OF SASKATCHEWAN INC.

Agriculture and Agri-Food Canada / Agriculture et Agroalimentaire Canada

Investment Agriculture Foundation of British Columbia

BC Food Processors Association

Ag-West Bio

CQVB Centre québécois de valorisation des biotechnologies

PRINCE EDWARD ISLAND AGRIALLIANCE

PRINCE EDWARD ISLAND BioAlliance collaboration to commercialization

December 2012

- **BioAccess Commercialization Centre** is a not-for-profit organization that has provided business and commercialization support to western Canada's functional food and natural health product industry since 2006.
  - Since our inception, we have seen a growing demand for health and wellness products in Canada. Unfortunately, information about the actual wants and needs of Canadian consumers are not readily available to small and medium sized companies. This represents a commercialization barrier, as access to strategic information is required to properly assess market opportunities and target new product development.
- With the support of various government and industry organizations, BioAccess commissioned the following survey project to:
  - Increase understanding of the Canadian consumers perceptions of healthy food and ingredients, including functional foods and natural health products;
  - Provide consumer information directly to small and medium sized health and wellness products' companies in Canada;
  - Stimulate interest in the development and commercialization of healthier foods and beverages.

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Overview

Overview

- There has been widespread adoption of functional foods and natural health products (NHP) among Canadians. Virtually all have consumed functional foods and at least eight in ten have taken NHPs within the past year.
- While previously considered to be niche products sold at specialty retailers/food stores or farmers' markets, functional foods and NHPs are predominantly purchased through the traditional retail channels of grocery stores and mass retailers.
- The availability and ease of access of functional foods and NHPs through mainstream distribution channels will ensure continued adoption of new products as they become available. For producers and suppliers, however, it indicates the need to offer relevant products supported by marketing as they compete for valuable shelf space.
- In terms of the motivations to adopt functional foods and NHPs, Canadians are making the connection between diet and health. At least eight in ten agree there is a link between diet and health and are concerned about eating a healthy diet.
- Almost all Canadians indicated they have at least one health concern and they appear to be adjusting their behavior accordingly, with almost one half reporting they have changed their diets as a result.
    - Given the aging population, it is likely there will be a growing number of Canadians with health concerns in the future, further reinforcing the relationship between diet and health and modification of diet as a result of health concerns.
- While there has been widespread adoption, there is a proportion of Canadians who are seeking specific foods for health, indicating that a component of the functional foods and NHPs will remain a niche market.
    - Those who have more health concerns are more likely to feel they have not been able to address their dietary concerns with the current products available.

Overview

Perceptions of Food & Dietary Health

- Most Canadians agree that foods and beverages consumed affect their health (86% agree), and are concerned about eating a healthy or balanced diet (80%). However, fewer Canadians say they seek out food with fewer, simpler ingredients (60%).
- While 96% of Canadians say they are concerned with at least one health issue affecting themselves or another member of their household, less than half (45%) have changed their diet to address a specific health concern.

Functional Foods

- The vast majority of Canadians purchase functional food products. In the past year, 98% of those surveyed purchased some type of functional food or beverage. The most common types include cereals (ie: those made from whole grains, high in fibre, with added omega-3 or 6's, etc.), healthy snack foods, and yogurt with added probiotics.
- Those who buy functional food products typically buy them at grocery stores (94%) and mass retailers like Walmart and Costco (61%), another sign that functional food consumption is mainstream, and that awareness of these products is common.
- Those who claim that they are willing to spend more for healthier foods and beverages (82% of Canadians) say they would spend, on average, 18% more.
- The most influential added ingredients to functional foods are fibre (87% of Canadians say it has either 'a lot' or 'a little' influence), vitamins and minerals (86%) and protein (85%).

Overview

Natural Health Products

- Over eight-in-ten Canadians have previously consumed natural health products – the most common types being vitamins/minerals and omega 3's/essential fatty acids – and 56% say they are probably or definitely likely to purchase NHPs in the future.
  - Among those who do not consume NHPs, the most common explanations are "I prefer to get my nutrients by eating a balanced diet" (27%) followed by "I don't believe NHPs do what they claim" (17%).
- Natural Health Food stores rank fourth among the most common retail locations for NHPs. Canadians who buy NHPs are more likely to buy them in grocery stores (65%), pharmacy/drug stores (59%) and mass retailers (47%).

Background & Methodology

Background & Objectives

- Ipsos Reid was commissioned by the BioAccess Commercialization Centre to assess Canadian's perceptions of health and wellness and more specifically functional foods and beverages and natural health products.
- Specifically the research was designed to develop a deeper understanding of:
  - Canadians perceptions of food and health;
  - Consumption of functional foods and beverages;
  - Factors influencing the purchase decision for functional foods and beverages;
  - The role of product attributes and claims in the purchase decision;
  - The influence of ingredients on food choices;
  - Retail locations for the purchase of functional foods;
  - The premium Canadians are willing to pay for healthier foods;
  - Sources of information for healthy and functional foods;
  - Identification of any specific dietary or health requirements that are not currently met; and
  - Consumption of natural health products (NHPs).

Methodology

- The research was conducted via CATI with a total of 2000 interviews completed between November 15th and December 2nd, 2012.
- Working with BioAccess, Ipsos designed a survey instrument that averaged 16 minutes in length and interviews were conducted in both English and French.
- The sample frame was as follows:

	British Columbia	Alberta	Saskatchewan /Manitoba	Ontario	Quebec	Atlantic	Total Canada
Number of Interviews	N=240	N=200	N=130	N=800	N=500	N=130	2,000
Margin of Error	+/- 6.3	+/-6.9	+/-8.6	+/-3.5	+/-4.4	+/-8.6	+/- 2.2

- Margin of error represents how close a random sample's results are to the "true" figures of an entire population.
  - For instance, based on a randomly selected sample of 500, we can be certain that survey results from Quebec will be within 4.4 percentage points of the true population figure, 19 times out of 20.
- Results deemed statistically significantly higher are indicated by a lettering system – a result is significantly different if it falls outside of the margin of error when comparing two sample groups. For the purposes of the report, when a letter appears by a result, it denotes that the result is significantly higher within that sample group compared to the group indicated by the letter.

Methodology (cont.)

- For the purposes of the report, we have defined functional food users on the basis of light, medium and heavy use, taking into account the variety and frequency of consumption. Respondents were also provided with the following descriptions:
  - Functional Foods (FFs):

  … are foods and beverages that have a potentially positive effect on health beyond basic nutrition. Examples are: orange juice that's been fortified with calcium for bone health, yogurt containing probiotics, and eggs with omega-3 fatty acids.

  - Natural Health Products (NHPs):

  … are products made from natural sources, sold in dosage form, and are designed to maintain or promote health; restore or correct human health function; and/or diagnose, treat or prevent disease. Examples of natural health products include supplements, herbal remedies, vitamins & minerals, traditional medicine, homeopathic medicine

Perceptions of Food & Dietary Health

Perceptions of Food & Dietary Health

- Those surveyed in BC (87%) and Saskatchewan/Manitoba (86%) are most concerned with eating a healthy and balanced diet. Albertans (73%) and Quebecers (75%) claim to be the least concerned.
- British Columbians are most inclined to seek out foods with fewer and simpler ingredients (66% vs. 60% all Canadians). Albertans are least likely (51%).
    - Those over 45 are also more likely (66% vs. 55% under 45) to seek out foods with fewer and simpler ingredients.
- British Columbians show highest agreement with each of the four health and food related statements asked than their counterparts in other provinces (74% average score for all statements vs. 68% all Canadians). Quebecers (62%) least agree with these statements, followed closely by Albertans (63%).
- Women agree significantly more with three of the four statements when compared to men: “I am concerned about eating a healthy or balanced diet” (84% vs. 75% men), “I seek out foods with fewer, simpler ingredients” (66% vs. 54%), and “I have made changes to my diet because of a specific health concern” (51% vs. 38%).
- Those reporting a larger number of household health concerns are more likely to agree with these four statements (72% average for those with 3+ concerns vs. 61% with 1-2 concerns vs. 54% with no concerns).

Perceptions of Food & Dietary Health– Region

	% Agree, Rated 4 or 5						
	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
I believe the foods and beverages I consume affect my health	86%	90% R	86%	90% R	87% R	79%	85%
I am concerned about eating a healthy or balanced diet	80%	87% OQRS	73%	86% OR	81% OR	75%	78%
I seek out foods with fewer, simpler ingredients	60%	66% O	51%	61%	61% O	60%	56%
I have made changes to my diet because of a specific health concern	45%	53% OR	42%	52% R	47% R	35%	46% R

NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents

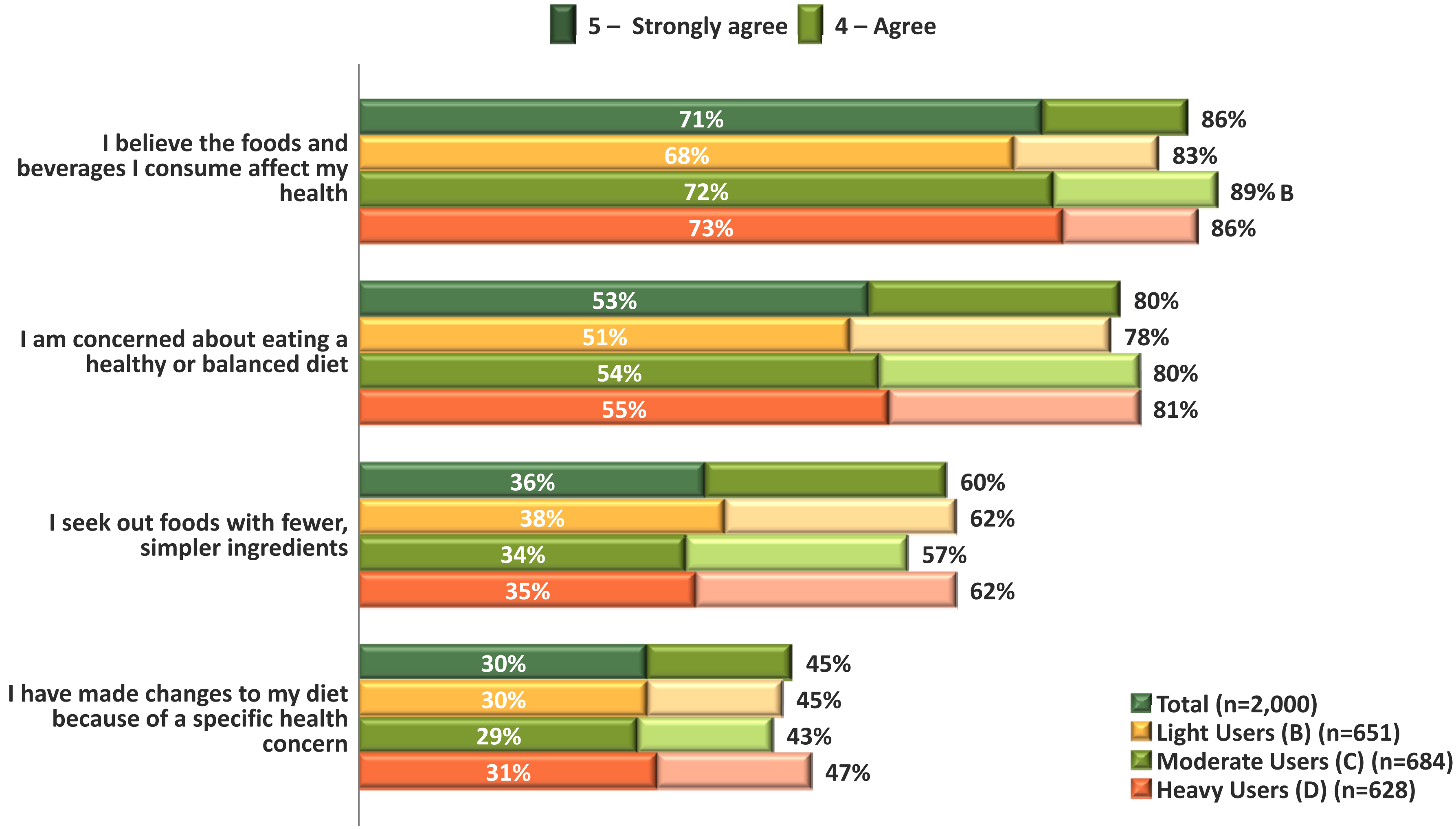
QA1. On a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please indicate your agreement or disagreement with the following statements:…

Perceptions of Food & Dietary Health – Age

	% Agree, Rated 4 or 5				
	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
I believe the foods and beverages I consume affect my health	86%	84%	87%	89% F	84%
I am concerned about eating a healthy or balanced diet	80%	67%	83% C	83% C	86% C
I seek out foods with fewer, simpler ingredients	60%	53%	59%	61% C	66% CDE
I have made changes to my diet because of a specific health concern	45%	32%	42% C	48% C	55% CDE

CDEF: Significantly higher than sub-group represented by that letter.
Base: All respondents
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:…

Perceptions of Food & Dietary Health – Functional Food Consumption



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

Base: All respondents

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:…

Current Household Health Concerns

Current Household Health Concerns

- Virtually all (96%) Canadians are concerned about an issue with their health, or the health of another member of their household. The most common household health concern is heart health (55%), followed by:
  - Bone/joint health (55%);
  - Weight loss/management (50%);
  - Digestive/gastrointestinal health (46%); and
  - Allergies or intolerance (44%).
- Digestive/gastrointestinal health is most likely to be a concern in Alberta (55% vs. 46% Canada).
- Interestingly, allergies or intolerance are more likely to be concerns in Saskatchewan/Manitoba (57% vs. 44% Canada).

Current Household Health Concerns – Region

	% Yes						
	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Heart health	55%	55% R	57% R	64% R	58% R	45%	57% R
Bone/joint health	55%	61% R	57% R	64% R	55% R	45%	59% R
Weight loss/management	50%	52% R	55% R	63% RS	54% R	38%	45%
Digestive/gastrointestinal health	46%	48%	55% QR	50%	44%	43%	45%
Allergies or intolerance	44%	44%	46% R	57% NQR	44% R	37%	45%
Immunity	39%	42% R	47% R	46% R	39% R	32%	40%
Memory/cognitive health	39%	41% R	42% R	46% R	40% R	32%	42% R
Diabetes	36%	37% R	34%	44% R	40% R	28%	32%
Sports performance or recovery	29%	23%	34% N	30%	27%	33% N	27%
Other	2%	3%	1%	4%	1%	3%	3%
Nothing	4%	2%	3%	1%	3%	8% NOPQ	6% N
Don't know	6%	6%	4%	3%	6%	10% OPQS	1%

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

Base: All respondents

QG1. Please tell me if you are concerned about each issue for your health personally , or the health of someone else in your household.

Current Household Health Concerns – Age

	% Yes				
	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Heart health	55%	48%	56%	58% C	58% C
Bone/joint health	55%	48%	46%	57% CD	63% CD
Weight loss/management	50%	50%	53%	54% F	47%
Digestive/gastrointestinal health	46%	46%	47%	47%	45%
Allergies or intolerance	44%	44%	51% F	46% F	39%
Immunity	39%	42% F	42% F	39%	35%
Memory/cognitive health	39%	36%	37%	41%	40%
Diabetes	36%	33%	34%	37%	37%
Sports performance or recovery	29%	36% F	37% F	32% F	19%
Other	2%	3%	1%	3%	2%
Nothing	4%	6% D	2%	4%	4%
Don't know	6%	7%	5%	5%	5%

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

Base: All respondents

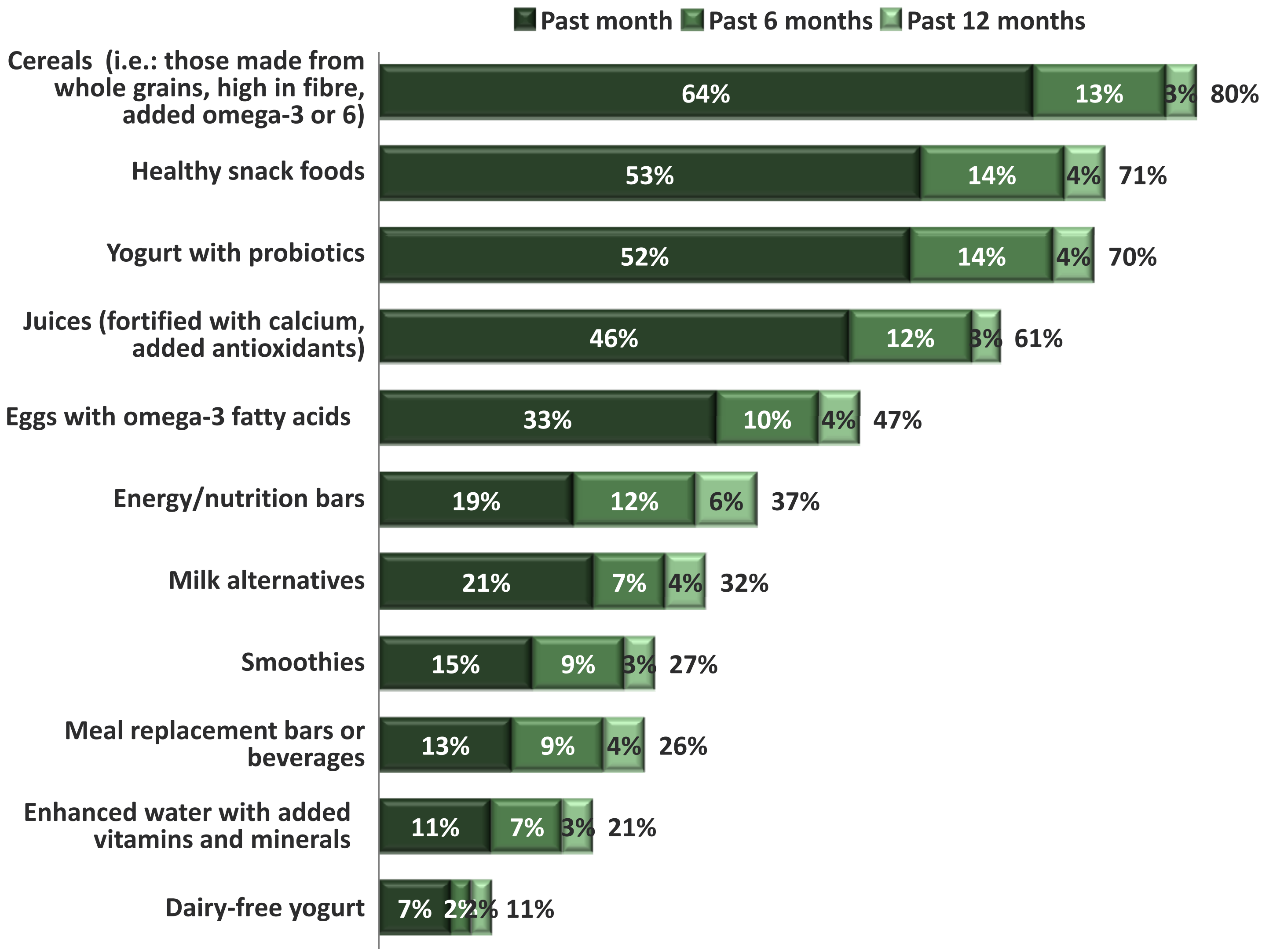
QG1. Please tell me if you are concerned about each issue for your health personally , or the health of someone else in your household.

Functional Food Consumption

Functional Food Consumption

- Virtually all Canadians have purchased some type of functional food in the past year; the most common types are:
  - Cereals, such as those high in fibre or made from whole grains (64% purchased in the last month);
  - Healthy snack foods (53%);
  - Probiotic yogurt (52%); and
  - Juices (fortified with calcium, antioxidants, etc.) (46%).
- Interestingly, Albertans are most likely to consume energy/nutrition bars (50% in last month vs. 19% Canada), enhanced water (19% vs. 11%), healthy snack foods (61% vs. 53%), and smoothies (20% vs. 15%).
- There is a modest relationship between functional food consumption and natural health product use, as heavy users of functional foods (62%) are most likely to use NHPs at least monthly, followed by moderate users (51%) and light users (44%).
- Heavier functional food consumers tend to be younger Canadians who have higher household incomes, spend more on groceries, and have at least one child living in their household.
  - 44% of those living with 1+ children in their household are heavy functional food users, compared to 28% of those without children.
  - Over one-in-three heavy users (34%) have an income over $100,000, compared to 25% of moderate users, and 15% of light users.
  - Heavy users, on average, spend $175 per week on groceries, compared to $148 for moderate and $128 for light users.

Functional Food Consumption – All Canadians



Base: All respondents (n=2,000)

Q2a/b/c. I am now going to read you a list of foods and beverages that contain added beneficial ingredients. For each one, please tell me if you have purchased it in the past month/6 months/12 months.

Functional Food Consumption in Past Month – Region

	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Juices (fortified with calcium, added antioxidants)	46%	41%	43%	41%	47%	50% N	44%
Smoothies	15%	12%	20% NPQ	10%	14%	17%	17%
Enhanced water with added vitamins and minerals	11%	7%	19% NPQ	7%	9%	14% NQ	12%
Milk alternatives	21%	26%	19%	16%	21%	20%	19%
Yogurt with probiotics	52%	56%	49%	48%	49%	58% Q	51%
Dairy-free yogurt	7%	7%	5%	8%	5%	9% Q	8%
Energy/nutrition bars	19%	16%	50% NPQRS	17%	20%	22% S	12%
Meal replacement bars or beverages	13%	13%	15% S	15% S	12%	16% S	7%
Healthy snack foods	53%	46%	61% NQ	59% S	51%	54%	57%
Cereals (i.e.: those made from whole grains, high in fibre, added omega-3 or 6)	64%	63%	62%	67%	63%	65%	60%
Eggs with omega-3 fatty acids	33%	31%	31%	25%	36% P	31%	30%

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

Base: All respondents

Q2a/b/c. I am now going to read you a list of foods and beverages that contain added beneficial ingredients. For each one, please tell me if you have purchased it in the past month/6 months/12 months.

Functional Food Consumption in Past 6 Months – Region

	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Juices (fortified with calcium, added antioxidants)	12%	14% R	15% R	12%	13% R	9%	12%
Smoothies	9%	12% S	16% QRS	12% S	9%	8%	3%
Enhanced water with added vitamins and minerals	7%	8%	8%	9%	7%	5%	7%
Milk alternatives	7%	8%	5%	12% O	7%	6%	7%
Yogurt with probiotics	14%	14%	21% R	13%	15% R	11%	17%
Dairy-free yogurt	2%	5% QR	2%	4% R	2%	1%	3%
Energy/nutrition bars	12%	16% Q	14%	13%	10%	13%	9%
Meal replacement bars or beverages	9%	10%	14% PQR	6%	8%	7%	10%
Healthy snack foods	14%	14%	11%	15%	15%	13%	18%
Cereals (i.e.: those made from whole grains, high in fibre, added omega-3 or 6)	13%	13%	17% R	12%	14% R	10%	13%
Eggs with omega-3 fatty acids	10%	9%	8%	13%	13% R	8%	6%

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

Base: All respondents

Q2a/b/c. I am now going to read you a list of foods and beverages that contain added beneficial ingredients. For each one, please tell me if you have purchased it in the past month/6 months/12 months.

Functional Food Consumption in Past 12 Months – Region

	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Juices (fortified with calcium, added antioxidants)	3%	4%	1%	4%	3%	3%	1%
Smoothies	3%	2%	4%	4%	3%	3%	2%
Enhanced water with added vitamins and minerals	3%	4%	5% Q	8% RQ	2%	3%	4%
Milk alternatives	4%	5%	5%	3%	4%	3%	5%
Yogurt with probiotics	4%	4%	3%	9% OQR	3%	4%	5%
Dairy-free yogurt	2%	3% Q	2%	1%	1%	2%	1%
Energy/nutrition bars	6%	8%	8%	3%	5%	5%	5%
Meal replacement bars or beverages	4%	4%	4%	3%	4%	4%	6%
Healthy snack foods	4%	5% S	3%	3%	5% S	3%	1%
Cereals (i.e.: those made from whole grains, high in fibre, added omega-3 or 6)	3%	3%	2%	4%	4%	2%	2%
Eggs with omega-3 fatty acids	4%	3%	3%	3%	5%	5%	4%

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

Base: All respondents

Q2a/b/c. I am now going to read you a list of foods and beverages that contain added beneficial ingredients. For each one, please tell me if you have purchased it in the past month/6 months/12 months.

Functional Food Consumption in Past Month – Age

	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Juices (fortified with calcium, added antioxidants)	46%	51% F	51% F	44%	40%
Smoothies	15%	22% F	20% F	19% F	6%
Enhanced water with added vitamins and minerals	11%	18% EF	17% EF	8%	5%
Milk alternatives	21%	22%	25% F	22% F	17%
Yogurt with probiotics	52%	53%	58% F	55% F	48%
Dairy-free yogurt	7%	7%	6%	4%	8% E
Energy/nutrition bars	19%	20% F	24% F	22% F	15%
Meal replacement bars or beverages	13%	15% F	20% EF	14% F	9%
Healthy snack foods	53%	61% F	64% EF	55% F	42%
Cereals	64%	62%	66%	63%	64%
Eggs with omega-3 fatty acids	33%	36%	35%	31%	30%

CDEF: Significantly higher than sub-group represented by that letter.
Base: All respondents
Q2a/b/c. I am now going to read you a list of foods and beverages that contain added beneficial ingredients. For each one, please tell me if you have purchased it in the past month/6 months/12 months.

Functional Food Consumption in Past 6 Months – Age

	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Juices (fortified with calcium, added antioxidants)	12%	16% DF	10%	12%	10%
Smoothies	9%	12% F	13% F	11% F	6%
Enhanced water with added vitamins and minerals	7%	10% F	9% F	8% F	4%
Milk alternatives	7%	8%	5%	8%	6%
Yogurt with probiotics	14%	14%	13%	15%	15%
Dairy-free yogurt	2%	1%	2%	3%	4% C
Energy/nutrition bars	12%	15% F	11%	12%	10%
Meal replacement bars or beverages	9%	10%	10%	10% F	6%
Healthy snack foods	14%	15%	10%	16% D	15%
Cereals	13%	17%	12%	11%	12%
Eggs with omega-3 fatty acids	10%	8%	9%	13% C	11%

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

Base: All respondents

Q2a/b/c. I am now going to read you a list of foods and beverages that contain added beneficial ingredients. For each one, please tell me if you have purchased it in the past month/6 months/12 months.

Functional Food Consumption in Past 12 Months – Age

	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Juices (fortified with calcium, added antioxidants)	3%	3%	3%	3%	2%
Smoothies	3%	5%	4%	2%	2%
Enhanced water with added vitamins and minerals	3%	4%	4%	4%	2%
Milk alternatives	4%	3%	5%	5%	4%
Yogurt with probiotics	4%	4%	5%	3%	4%
Dairy-free yogurt	2%	1%	2%	1%	2%
Energy/nutrition bars	6%	9% EF	5%	4%	4%
Meal replacement bars or beverages	4%	5%	3%	5%	3%
Healthy snack foods	4%	4%	3%	4%	5%
Cereals (i.e.: those made from whole grains, high in fibre, added omega-3 or 6)	3%	4%	2%	4%	3%
Eggs with omega-3 fatty acids	4%	3%	5%	4%	4%

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

Base: All respondents

Q2a/b/c. I am now going to read you a list of foods and beverages that contain added beneficial ingredients. For each one, please tell me if you have purchased it in the past month/6 months/12 months.

Factors in the Food Purchase Decision

Factors in the Food Purchase Decision

- Canadians rate taste (97% say it has a little or a lot of impact) as having the most impact on their purchase decisions, followed by nutritional facts panel (92%), ingredients list (89%) and price (89%).
  - British Columbians' (94%) decisions are impacted more significantly by the ingredients list than those in Quebec (86%) and Ontario (89%).
- Appealing packaging was rated as the least impactful factor on Canadians purchase decisions (55%).
  - Atlantic Canadians (69%) are more likely to say that appealing packaging makes an impact on their purchase decisions when compared to those in Alberta (55%), Ontario (55%) and Quebec (46%).

Factors in the Food Purchase Decision – Region

	% impacted, a lot/little impact						
	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Taste	97%	96%	95%	99%	97%	96%	97%
Nutritional facts panel	92%	93% R	92%	89%	92% R	88%	93%
Ingredient list	89%	94% QR	93% R	90%	89%	86%	91%
Price	89%	89%	87%	90%	90%	89%	93%
Convenience	86%	87%	86%	85%	87% R	83%	87%
Brand name	71%	72% R	70%	79% R	74% R	63%	75% R
Appealing packaging	55%	58% R	55% R	59% R	55% R	46%	67% OQR

NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents
QB1. How much of an impact do the following have on your decision to buy foods and beverages? Would it be a lot of impact, a little impact, or no impact?

Factors in the Food Purchase Decision – Age

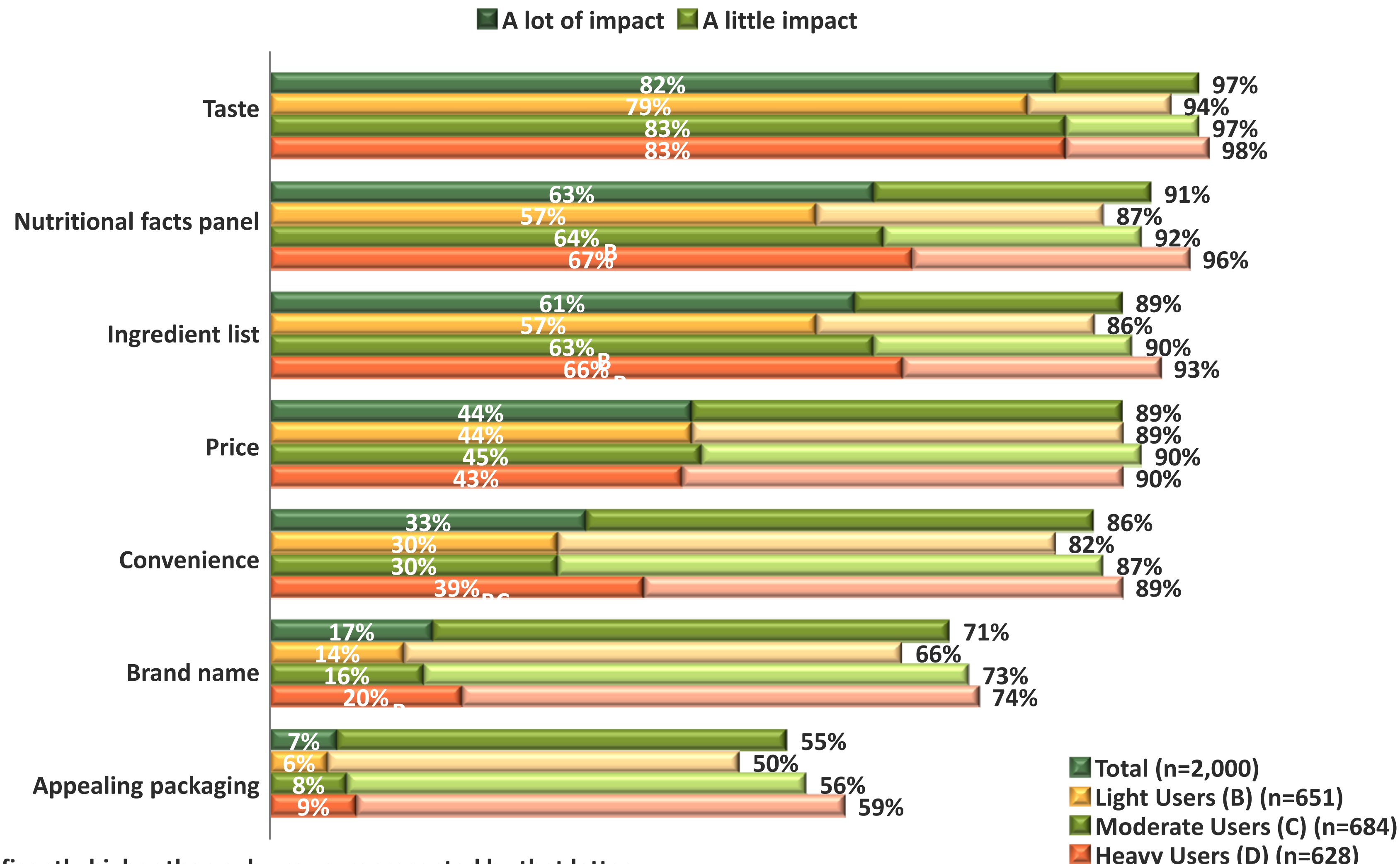
	% impacted, a lot/little impact				
	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Taste	97%	96%	98% F	99% CF	95%
Nutritional facts panel	91%	89%	92%	93%	91%
Ingredient list	89%	84%	92% C	92% C	91% C
Price	89%	91%	88%	89%	89%
Convenience	86%	89% F	86%	87% F	82%
Brand name	71%	65%	73% C	74% C	73% C
Appealing packaging	55%	55%	53%	59% F	52%

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

Base: All respondents

QB1. How much of an impact do the following have on your decision to buy foods and beverages? Would it be a lot of impact, a little impact, or no impact?

Factors in the Food Purchase Decision – Functional Food Consumption



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

Base: All respondents

QB1. How much of an impact do the following have on your decision to buy foods and beverages? Would it be a lot of impact, a little impact, or no impact?

Role of Product Attributes/Claims in the Food Purchase Decision

Role of Product Attributes/Claims in the Food Purchase Decision

- Locally made / made in Canada products (73%), all natural (49%) and GMO-free (43%) product attributes/claims have the greatest impact on likelihood to purchase among all Canadians.
  - Locally made / made in Canada products appeal most to Atlantic Canadians (86% more likely to buy).
  - Compared to all Canadians, British Columbians are more likely to purchase GMO-free (53% vs. 43%) and certified organic products (40% vs. 32%).
  - A 'seal of approval' (ie: Heart & Stroke Health Check program) appeals significantly more to Canadians over 55 (48% vs. 36% under 55).
  - In Quebec, 23% are most likely to purchase dairy-free products while those on the prairies are least likely (Alberta, Saskatchewan/Manitoba: 14% each).
- Women are more influenced by most of the attributes/claims in question. Specifically, they are significantly more likely to purchase locally made/made in Canada (76% vs. 71%), all natural (52% vs. 45%), GMO-free (48% vs. 39%), seal of approval (45% vs. 36%), raw (37% vs. 28%) and vegan/vegetarian (19% vs. 12%) products than men.
- Those who use natural health products on at least a monthly basis are more influenced by the claims of all-natural products – 53% versus 39% of those who do not use NHPs.

Role of Product Attributes/Claims in the Food Purchase Decision – Region

	% more likely, a little/lot more likely						
	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Locally made/ Made in Canada	73%	76%	72%	74%	73%	68%	86% NOPQR
All natural	49%	52%	50%	46%	48%	47%	50%
GMO-free	43%	53% OPQRS	35%	35%	45% O	43%	40%
Seal of approval	40%	39%	34%	37%	41%	42%	50% O
Raw	33%	35%	30%	40%	33%	32%	31%
Certified organic	32%	40% OPQ	30%	26%	31%	33%	30%
Gluten-free	19%	21%	21%	17%	18%	18%	18%
Dairy-free	18%	20%	14%	14%	16%	23% OPQ	17%
Vegan or vegetarian	16%	18% P	11%	7%	18% OP	17%	13%

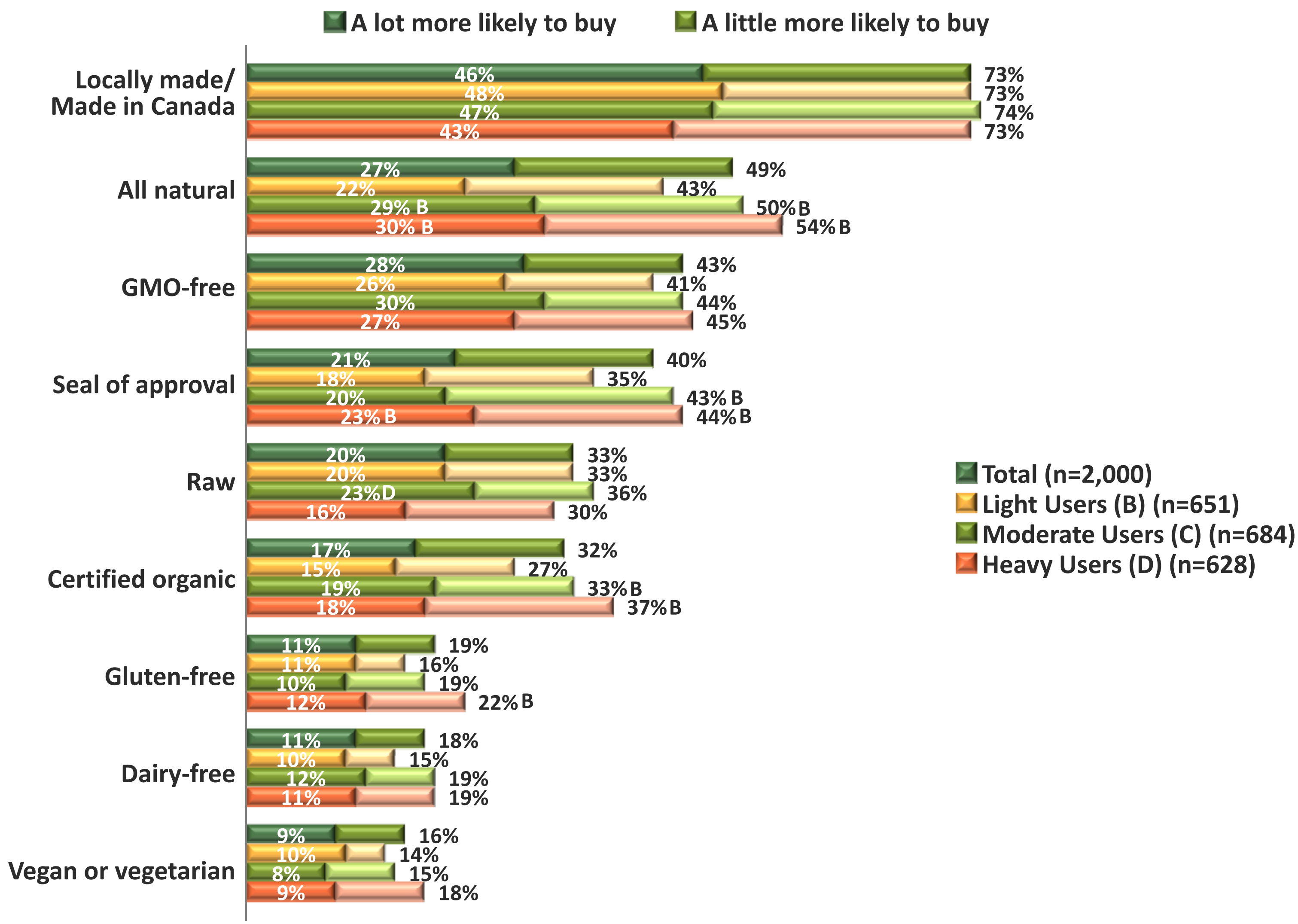
NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents
QB2. Are you more likely or less likely to buy a product with the following attributes or claims?

Role of Product Attributes/Claims in the Food Purchase Decision – Age

	% more likely, a little/lot more likely				
	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Locally made/ Made in Canada	73%	64%	75% C	74% C	79% C
All natural	49%	47%	53%	47%	49%
GMO-free	43%	39%	44%	43%	46% C
Seal of approval	40%	32%	40% C	40% C	48% CDE
Raw	33%	25%	32%	35% C	38% CD
Certified organic	32%	33%	35%	32%	30%
Gluten-free	19%	13%	22% C	21% C	21% C
Dairy-free	18%	16%	16%	18%	20%
Vegan or vegetarian	16%	15%	13%	18%	16%

CDEF: Significantly higher than sub-group represented by that letter.
Base: All respondents
QB2. Are you more likely or less likely to buy a product with the following attributes or claims?

Role of Product Attributes/Claims in the Food Purchase Decision – Functional Food Consumption



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

Base: All respondents

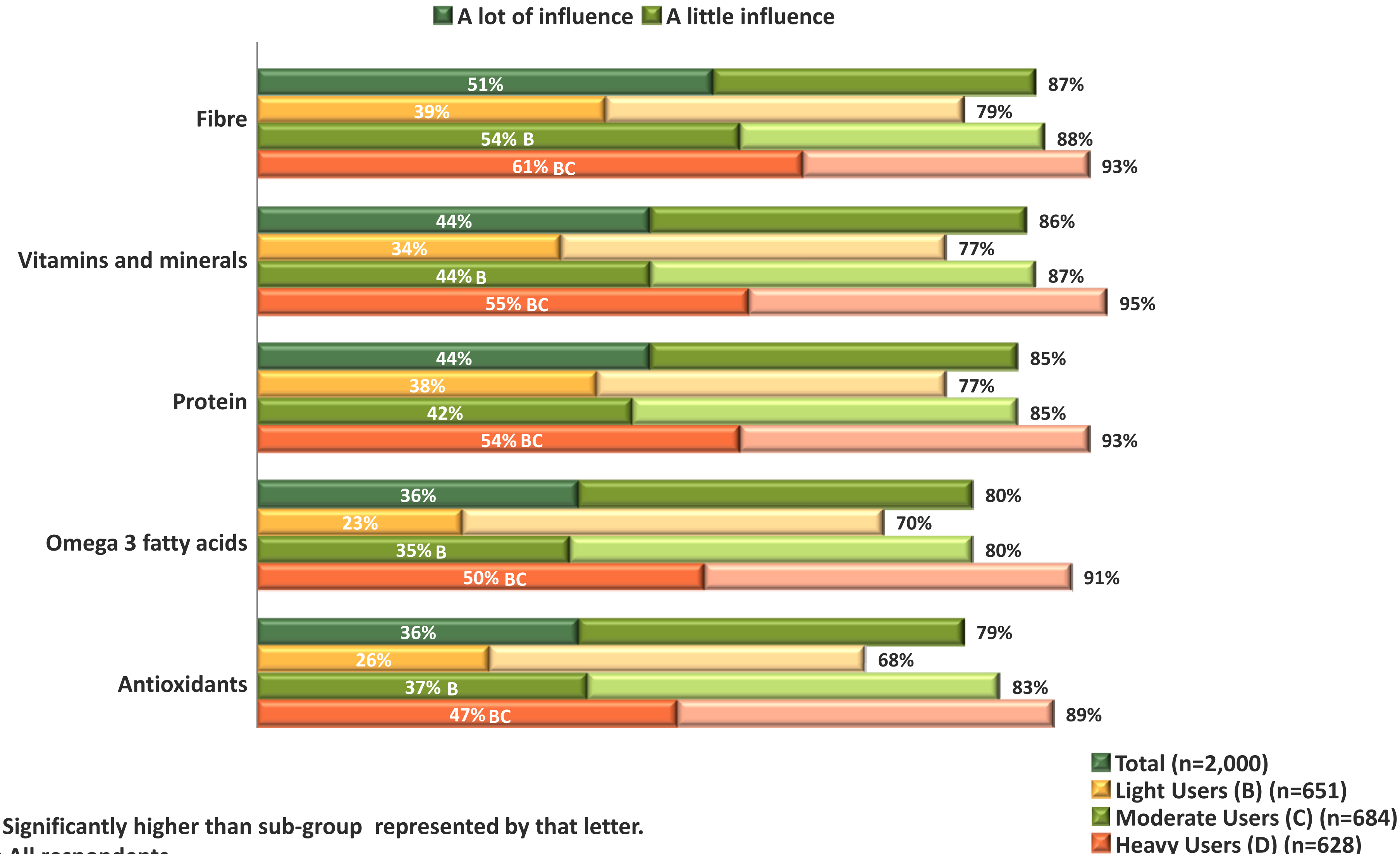
QB2. Are you more likely or less likely to buy a product with the following attributes or claims?

Influence of Added Ingredients on Food Purchase Decision

Influence of Added Ingredients on Food Purchase Decision

- Fibre (87%) has the most influence on purchase intent, followed closely by vitamins/minerals (86%) and protein (85%).
- Omega 3 fatty acids are influential for 80% of Canadians, especially in Saskatchewan/Manitoba (85%) and British Columbia (83%).
- Added medicinal herbs appeal most to Saskatchewan/Manitoba (65%) and British Columbia (63%), and least to Alberta (48%) and Quebec (44%).

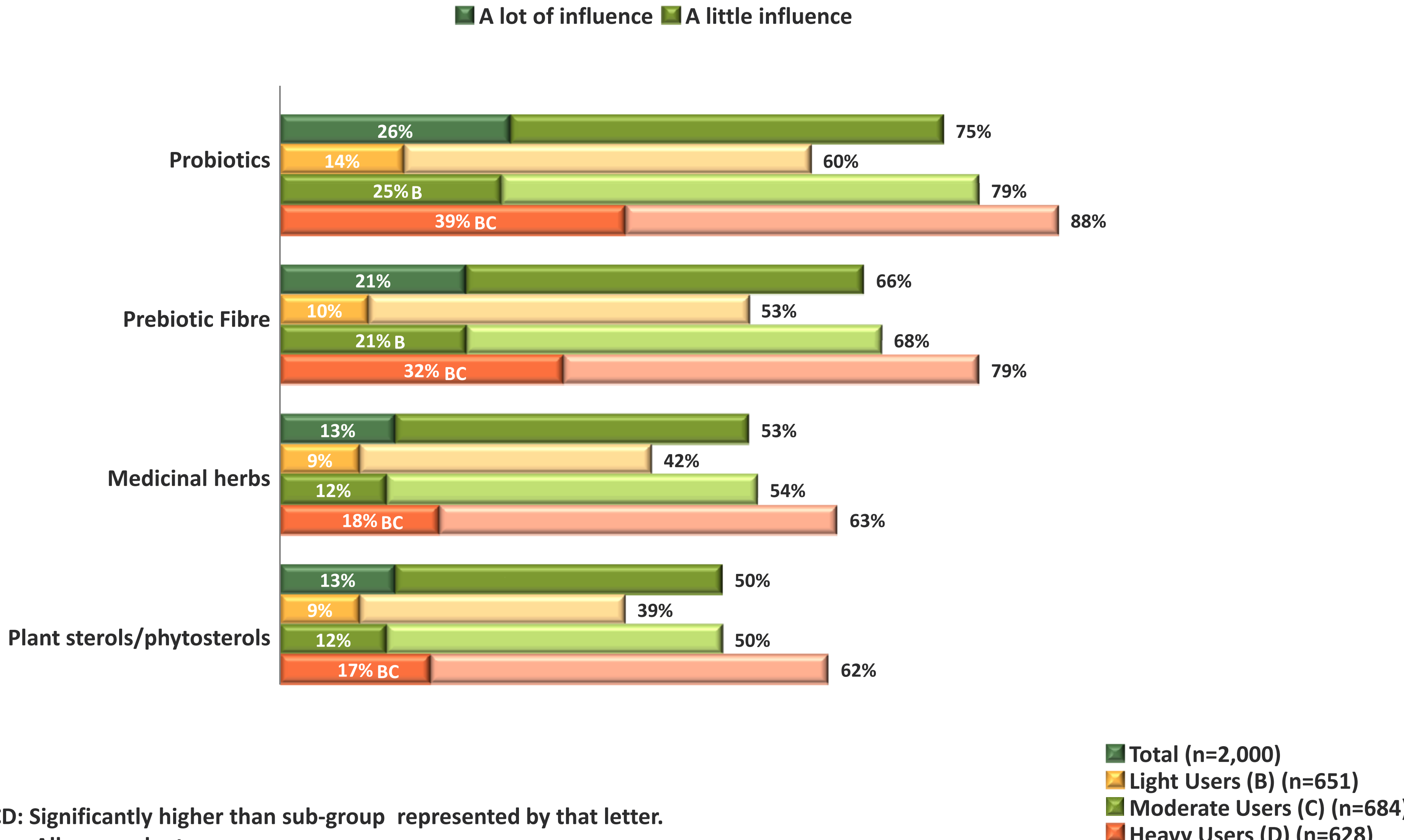
Influence of Added Ingredients on Food Purchase Decision – Functional Food Consumption



BCD: Significantly higher than sub-group represented by that letter.
Base: All respondents

QC1. Does added... have a lot of influence, a little influence, or no influence on your food choices?

Influence of Added Ingredients on Food Purchase Decision – Functional Food Consumption



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

Base: All respondents

QC1. Does added... have a lot of influence, a little influence, or no influence on your food choices?

Influence of Added Ingredients on Food Purchase Decision – Region

	% influenced, a lot/little influence						
	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Fibre	87%	86%	86%	86%	86%	86%	92%
Vitamins and minerals	86%	85%	84%	85%	87%	86%	87%
Protein	85%	83%	84%	86%	85% S	87% S	77%
Omega 3 fatty acids	80%	83% S	78%	85% S	80%	79%	74%
Antioxidants	79%	82%	77%	78%	79%	78%	80%
Probiotics	75%	77%	72%	82% O	76%	74%	73%
Prebiotic Fibre	66%	67%	61%	65%	68%	68%	63%
Medicinal herbs	53%	63% OQRS	48%	65% OQRS	55% R	44%	52%
Plant sterols/phytosterols	50%	51%	48%	46%	51%	52%	43%

NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents
QC1. Does added... have a lot of influence, a little influence, or no influence on your food choices?

Influence of Added Ingredients on Food Purchase Decision – Age

	% influenced, a lot/little influence				
	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Fibre	87%	83%	89% C	89% C	87%
Vitamins and minerals	86%	87%	89% F	88% F	84%
Protein	85%	89% EF	84%	82%	84%
Omega 3 fatty acids	80%	76%	81%	83% C	80%
Antioxidants	79%	77%	84% CF	80%	78%
Probiotics	75%	77%	79% F	76%	72%
Prebiotic Fibre	66%	67%	70%	67%	64%
Medicinal herbs	53%	48%	55%	55%	55% C
Plant sterols/phytosterols	50%	48%	52%	52%	50%

CDEF: Significantly higher than sub-group represented by that letter.
Base: All respondents
QC1. Does added... have a lot of influence, a little influence, or no influence on your food choices?

Specific Foods/Ingredients Sought for Added Health Benefits

Specific Foods/Ingredients Sought for Added Health Benefits

- Whole grains (76%) and Berries (70%) are listed as the most sought after food/ingredients by Canadians, when prompted.
- British Columbians tend to look for specific health food/ingredients more than other Canadians, especially ancient grains (63% BC vs. 49% Canada), flax (61% vs. 47%), and hemp (27% vs. 20%).
- Honey and natural marine products are sought after significantly more in BC (71% and 28%, respectively) and Quebec (66% and 25%), compared to Canada overall (62% and 20%).
- Canadians over 45 are slightly more likely to seek foods with added health benefits

Specific Foods/Ingredients Sought for Added Health Benefits – Region

	% Yes						
	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Whole grains	76%	81%	73%	77%	76%	73%	75%
Berries	70%	75% R	75% R	76% R	75% R	57%	71% R
Honey	62%	71% OQS	60%	63% S	58%	66% QS	48%
Lentils/chickpeas/beans	61%	69% ORS	54%	61%	63% O	59%	56%
Plant based oils	57%	62% Q	61% Q	62% Q	51%	64% Q	53%
Ancient grains	49%	63% OPQRS	46%	46%	46%	46%	51%
Flax (seed, oil)	47%	61% OPQRS	48%	47%	48% R	40%	43%
Fish oil	35%	44% R	35% R	34% R	39% R	24%	44% R
Hemp	20%	27% PQRS	22%	17%	19%	18%	16%
Marine natural products	20%	28% OPQS	18%	11%	16%	25% PQ	17%
Other	11%	9%	19% NPRS	6%	14% NPR	9%	8%
None of the above	6%	3%	9% NR	7%	7% NR	3%	7%
Don't know	0%	–	0%	–	0%	1% Q	–

NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents
QC4. Do you look for the following foods or ingredients specifically because of their added health benefits?

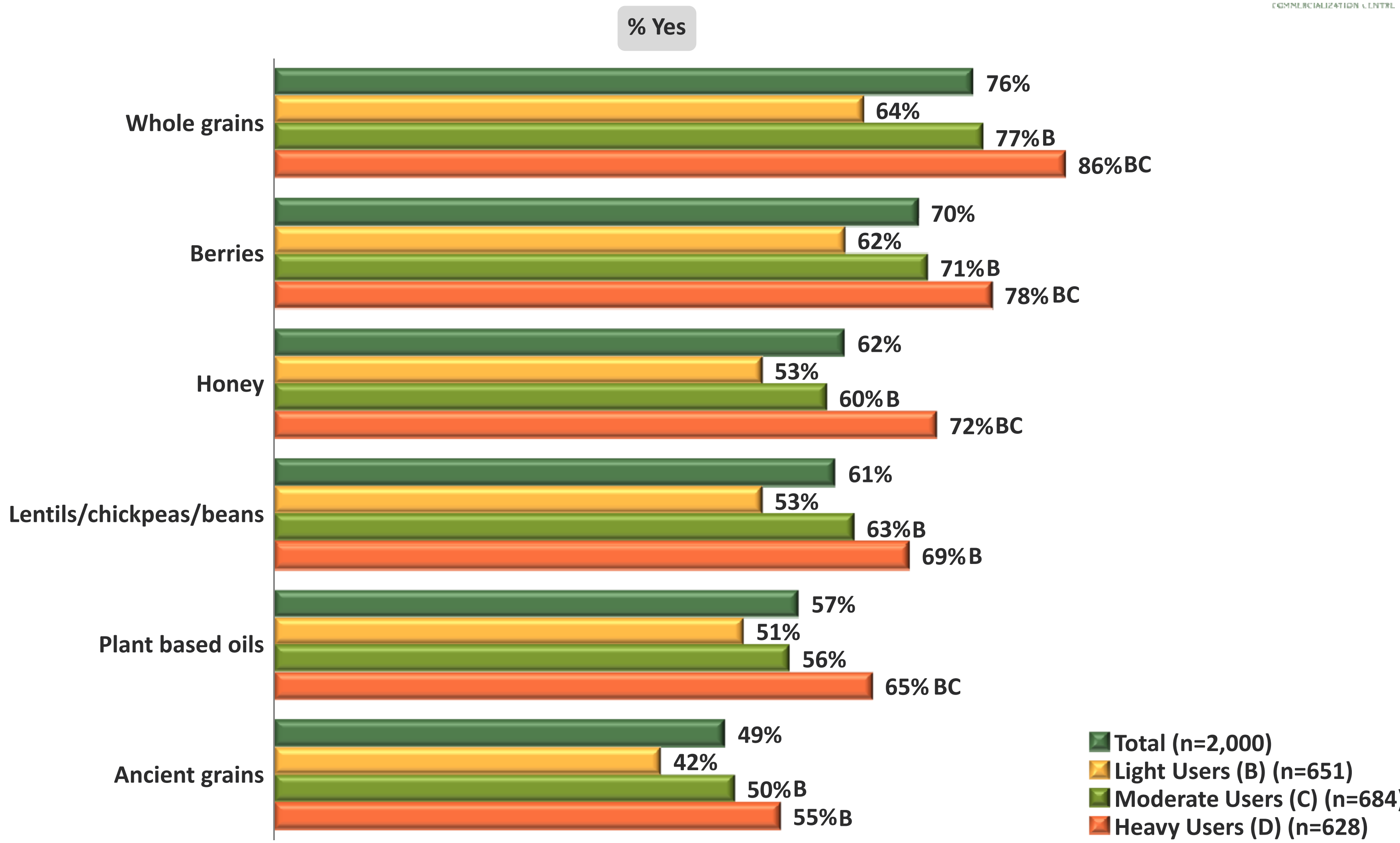
Specific Foods/Ingredients Sought for Added Health Benefits – Age

	% Yes				
	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Whole grains	76%	70%	79% C	78% C	78% C
Berries	70%	64%	67%	73% C	76% CD
Honey	62%	61%	60%	60%	65%
Lentils/chickpeas/beans	61%	54%	62%	64% C	65% C
Plant based oils	57%	49%	55%	58% C	64% CDE
Ancient grains	49%	43%	48%	54% C	50% C
Flax (seed, oil)	47%	40%	48% C	50% C	51% C
Fish oil	35%	32%	31%	37%	40% CD
Hemp	20%	22%	19%	20%	18%
Marine natural products	20%	20%	17%	19%	21%
Other	11%	7%	9%	15% CD	14% CD
None of the above	6%	8% (42)	7% (45)	6% (48)	4% (49)
Don't know	0%	0%	0%	0%	0%

CDEF: Significantly higher than sub-group represented by that letter.
Base: All respondents

QC4. Do you look for the following foods or ingredients specifically because of their added health benefits?

Specific Foods/Ingredients Sought for Added Health Benefits – Functional Food Consumption

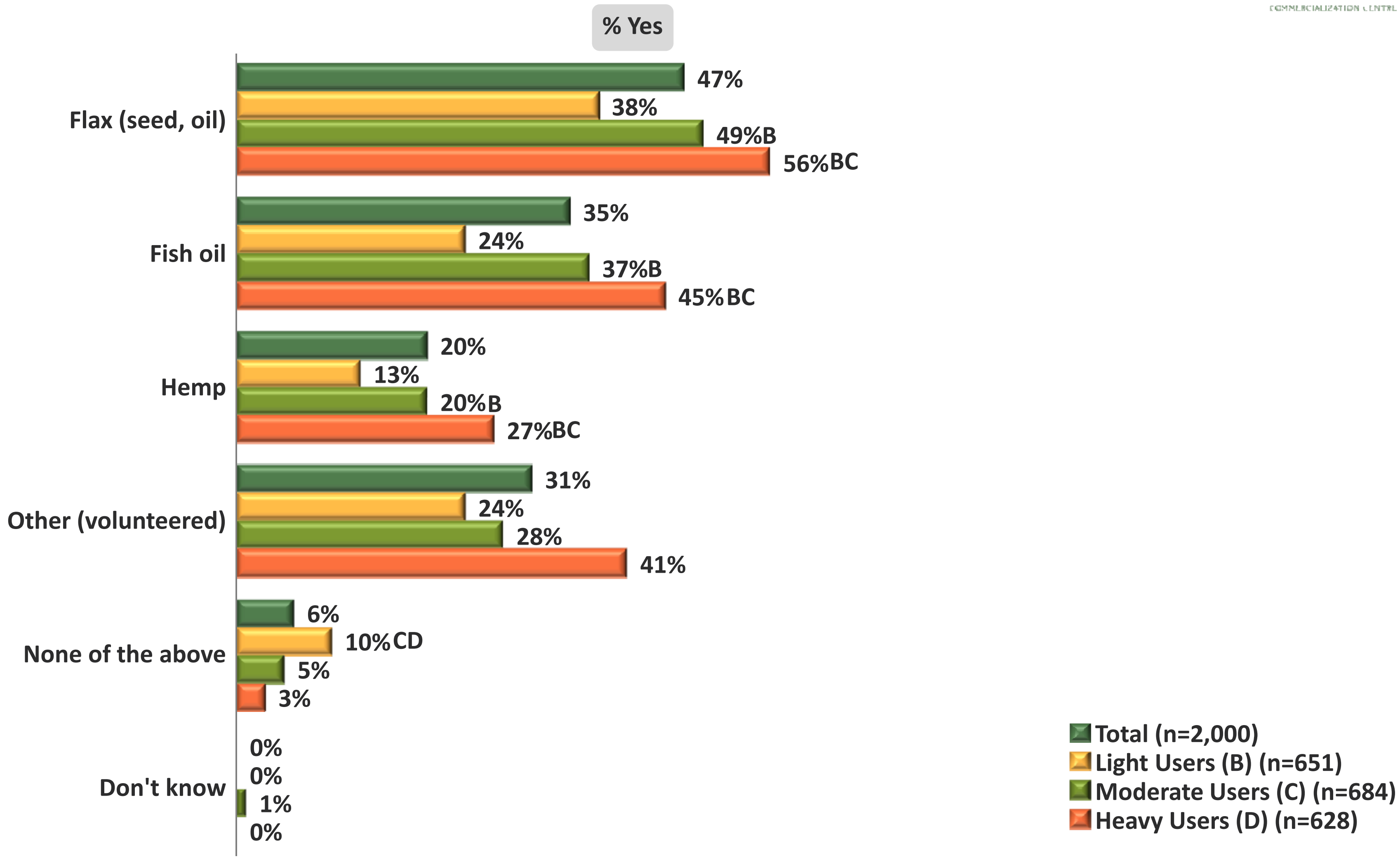


BCD: Significantly higher than sub-group represented by that letter.

Base: All respondents

QC4. Do you look for the following foods or ingredients specifically because of their added health benefits?

Specific Foods/Ingredients Sought for Added Health Benefits – Functional Food Consumption (cont'd)



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

Base: All respondents

QC4. Do you look for the following foods or ingredients specifically because of their added health benefits?

Retail Locations for Functional Foods

Retail Locations for Functional Food Purchase

- Virtually all Canadians (94%) buy functional foods and beverages at grocery stores and at least six in ten (61%) purchase from mass retailers.
  - British Columbians are significantly more likely to shop at organic grocery stores (33%) than average Canadians (23%).
  - Pharmacies/drug stores are more popular in the Atlantic provinces (48%) and BC (43%) compared to Canada overall (35%), and least popular among Albertans (23%) looking for these products.

Retail Locations for Functional Foods – Region

	% Yes						
	Total (n=1,963)	British Columbia (n=239) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=797) (Q)	Quebec (n=498) (R)	Atlantic (n=130) (S)
Grocery stores	94%	94%	91%	95%	95% O	94%	97%
Mass retailers (e.g., Walmart, Costco)	61%	58%	66%	66%	60%	59%	64%
Farmers Market	51%	63% QR	57% R	53% R	50% R	37%	63% QR
Pharmacy/drug stores	35%	43% OPQ	23%	32%	34% O	36% O	48% OPQR
Natural Health food stores	33%	38%	31%	37%	33%	33%	27%
Organic grocery stores	23%	33% OPQRS	20%	16%	20%	25%	22%
Direct from an online retailer	7%	11% Q	10% Q	7%	5%	7%	5%
Gym/Health Club	6%	6%	6%	3%	6%	6%	4%
Other	4%	4%	6% R	8% R	5% R	1%	3%
Nothing	>1%	>1%	–	–	>1%	>1%	–
Don't know	>1%	1%	–	–	>1%	1%	–

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

Base: Among those who purchased functional foods or beverages in the last year

QC5. Which of the following stores do you regularly shop at to buy functional or healthy foods and beverages, or healthy ingredients?

Retail Locations for Functional Foods – Age

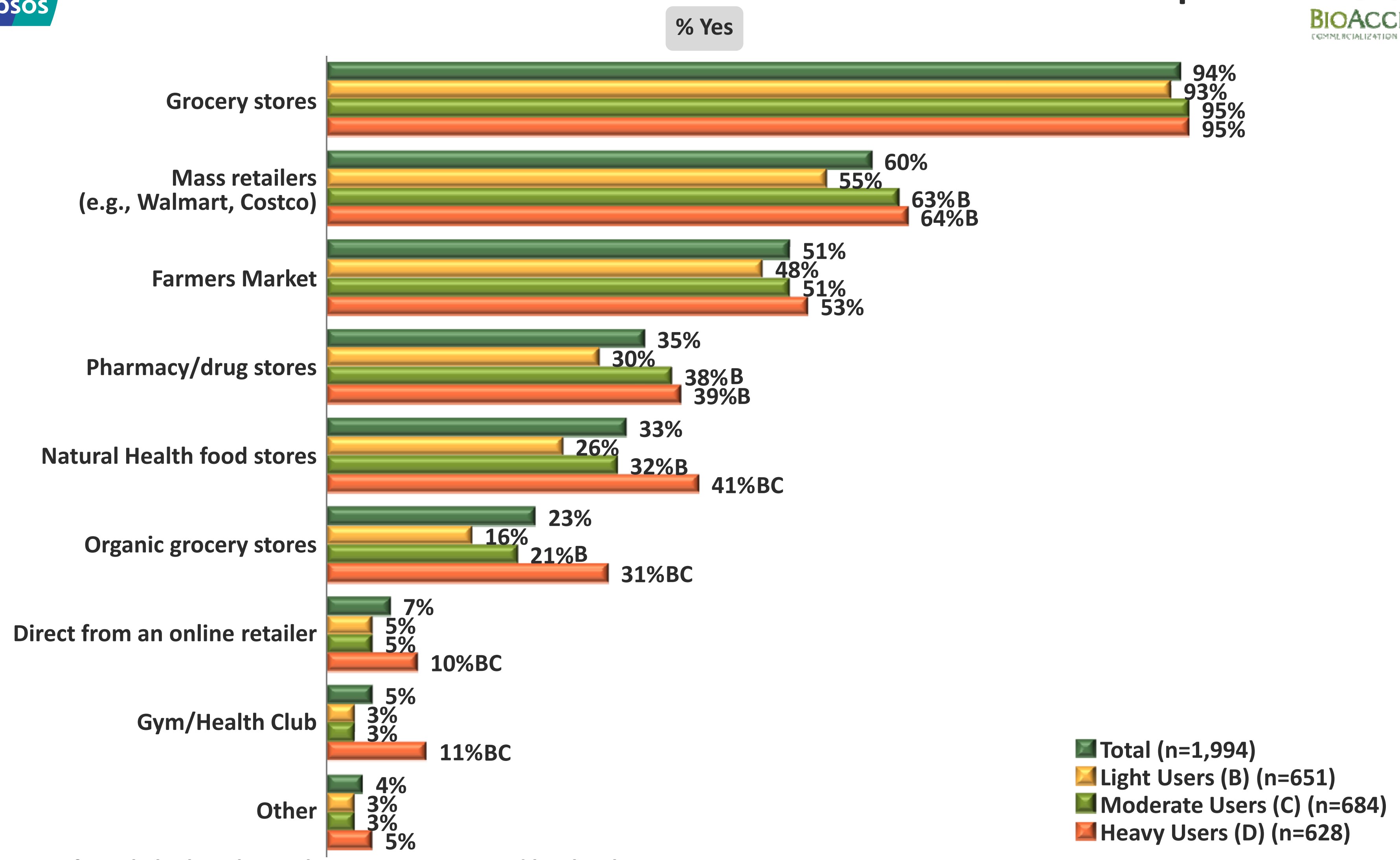
	% Yes				
	Total (n=1,994)	18 to 34 (n=253) (C)	35 to 44 (n=316) (D)	45 to 54 (n=476) (E)	55+ (n=914) (F)
Grocery stores	94%	94%	94%	94%	94%
Mass retailers (e.g., Walmart, Costco)	60%	68% DF	60%	62% F	54%
Farmers Market	51%	49%	54%	49%	52%
Pharmacy/drug stores	35%	32%	31%	35%	39% CD
Natural Health food stores	33%	24%	37% C	36% C	37% C
Organic grocery stores	23%	22%	24%	26%	21%
Direct from an online retailer	7%	5%	6%	8%	7%
Gym/Health Club	5%	6% F	7% F	7% F	3%
Other	4%	4%	4%	3%	4%
Nothing	0%	–	1%	–	0%
Don't know	0%	0%	1%	–	1%

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

Base: Among those who purchased foods or ingredients with added health benefits

QC5. Which of the following stores do you regularly shop at to buy functional or healthy foods and beverages, or healthy ingredients?

Retail Locations for Functional Foods – Function Food Consumption



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

Base: Among those who purchased foods or ingredients with added health benefits

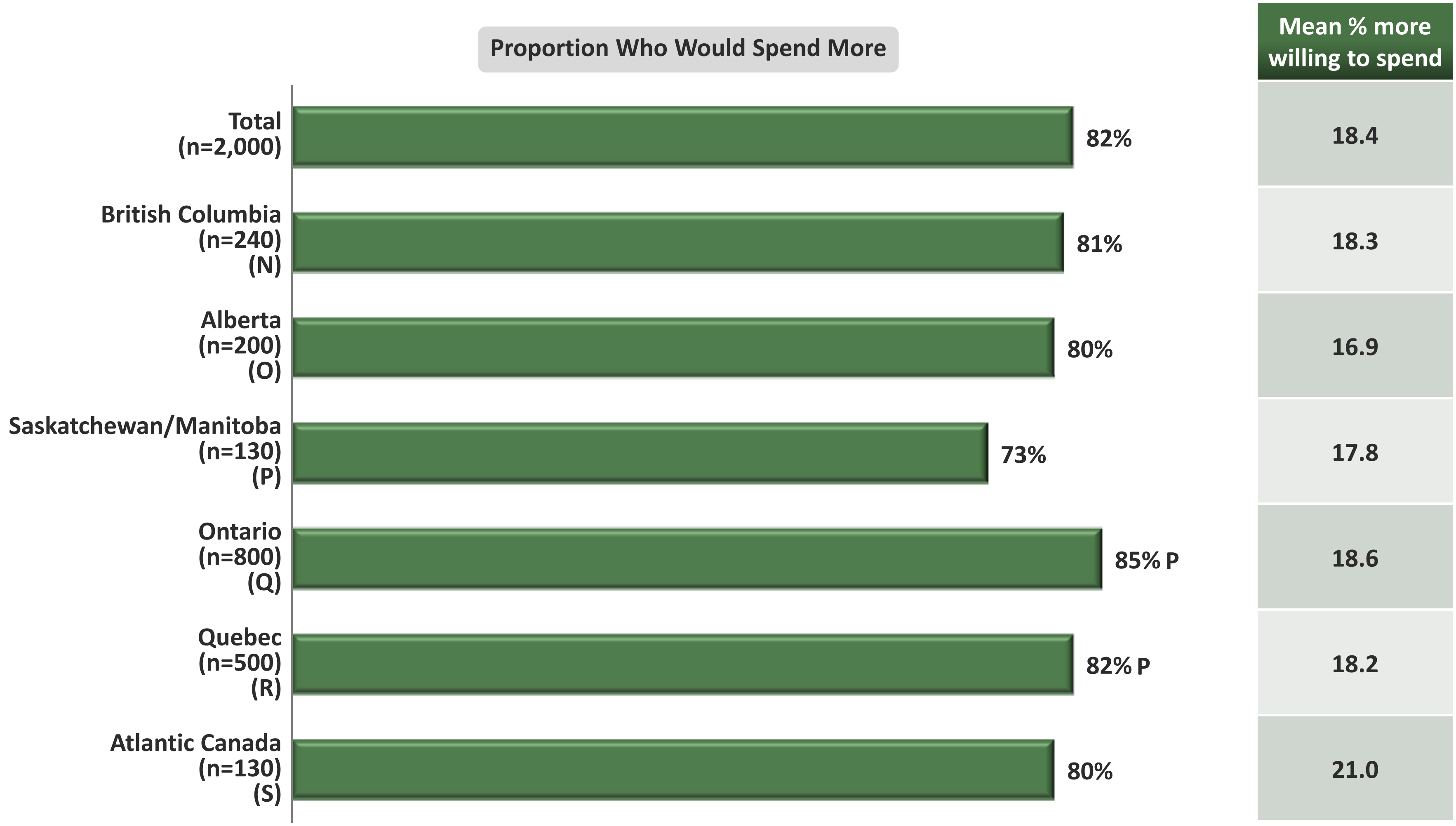
QC5. Which of the following stores do you regularly shop at to buy functional or healthy foods and beverages, or healthy ingredients?

Willingness to Spend More for Healthier Food

Willingness to Spend More for Healthier Food

- The vast majority of those surveyed claimed that they would be willing to spend more (82%) for healthier food and beverages.
- Respondents in Atlantic Canada report being willing to pay most (21%), while those in Alberta (17%) and Saskatchewan/Manitoba (18%) appear to be slightly less inclined to pay more.
- While those willing to pay more for healthier foods and beverages report an average additional amount of 18%, this should be interpreted with extreme caution.
  - It is not known what proportion of the current grocery spend is already associated with healthier foods and beverages as described in this survey. Rather this result should reflect that consumers recognize that there may be a price premium associated with healthier foods and beverages.

Willingness to Spend More for Healthier Food – Region

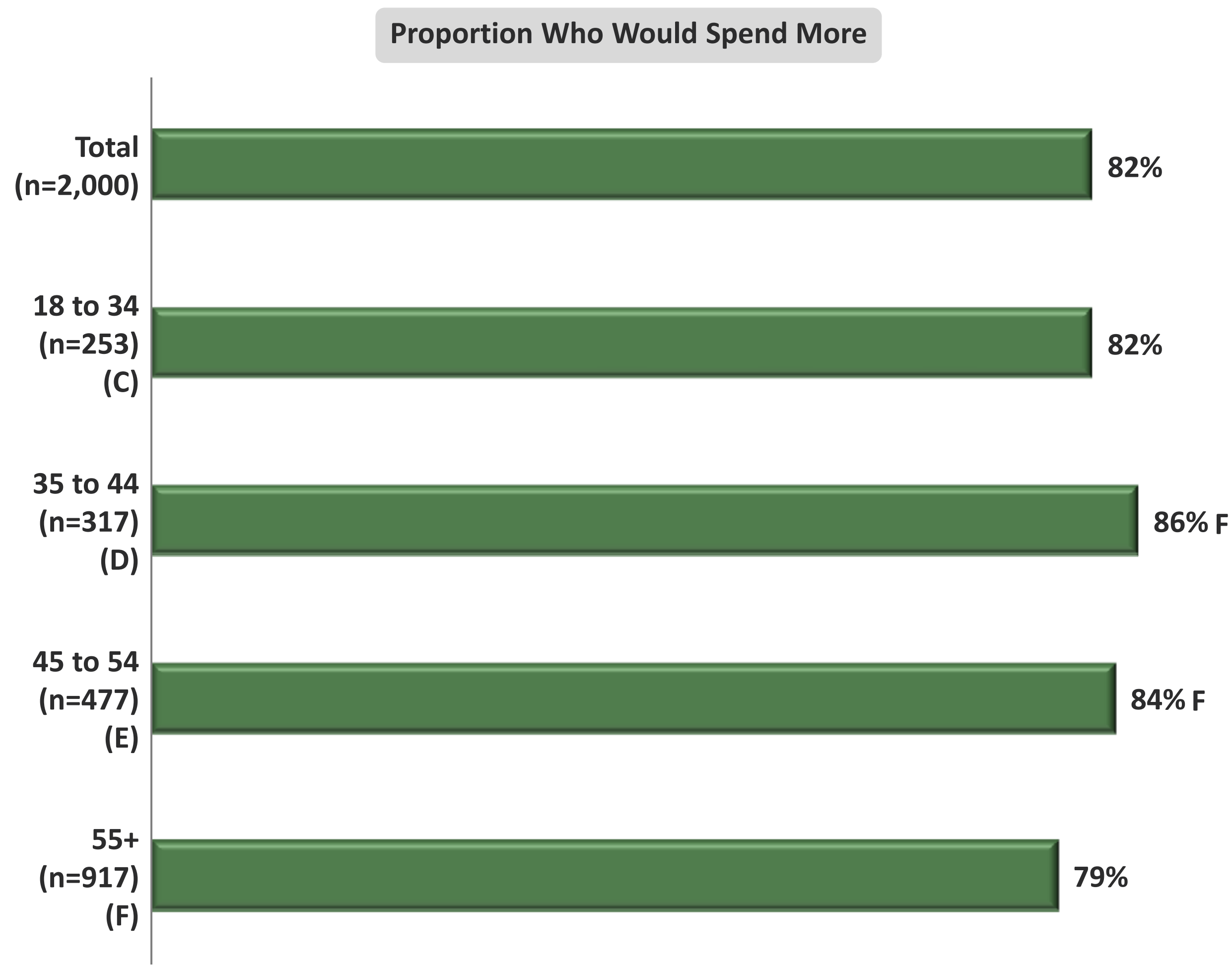


NOPQRS: Significantly higher than sub-group represented by that letter.

Base: All respondents

QC3. Thinking about what you currently spend on groceries, how much more would you be willing to spend on foods that are deemed to be better for you, such as Functional Foods?

Willingness to Spend More for Healthier Food – Age



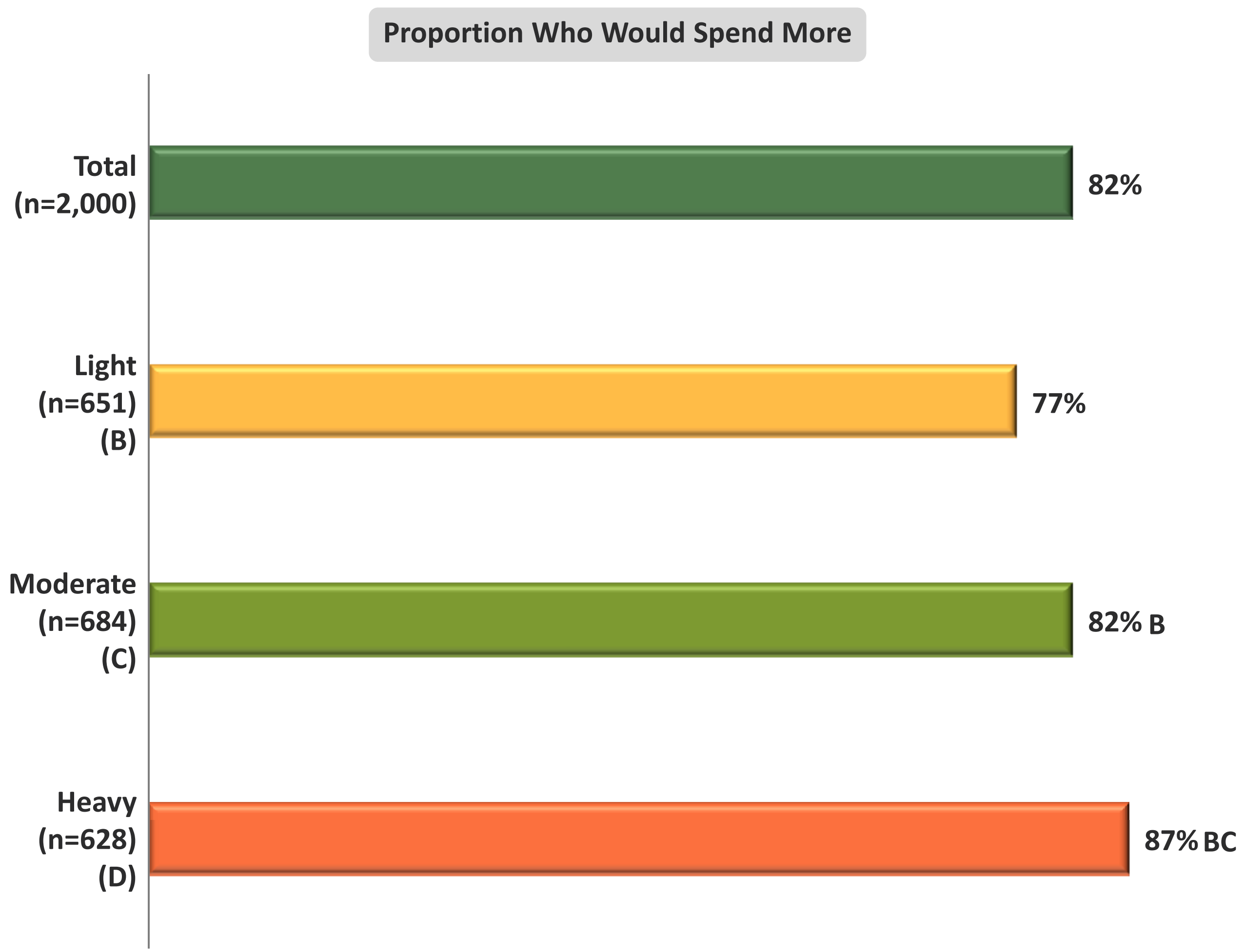
	Mean % more willing to spend
Total (n=2,000)	18.4
18 to 34 (n=253) (C)	20.1 DF
35 to 44 (n=317) (D)	16.6
45 to 54 (n=477) (E)	19.3 DF
55+ (n=917) (F)	17.1

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

Base: All respondents

QC3. Thinking about what you currently spend on groceries, how much more would you be willing to spend on foods that are deemed to be better for you, such as Functional Foods?

Willingness to Spend More for Healthier Food – Functional Food Consumption



Mean % more willing to spend
18.4
17.4
17.7
19.8 BC

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

Base: All respondents

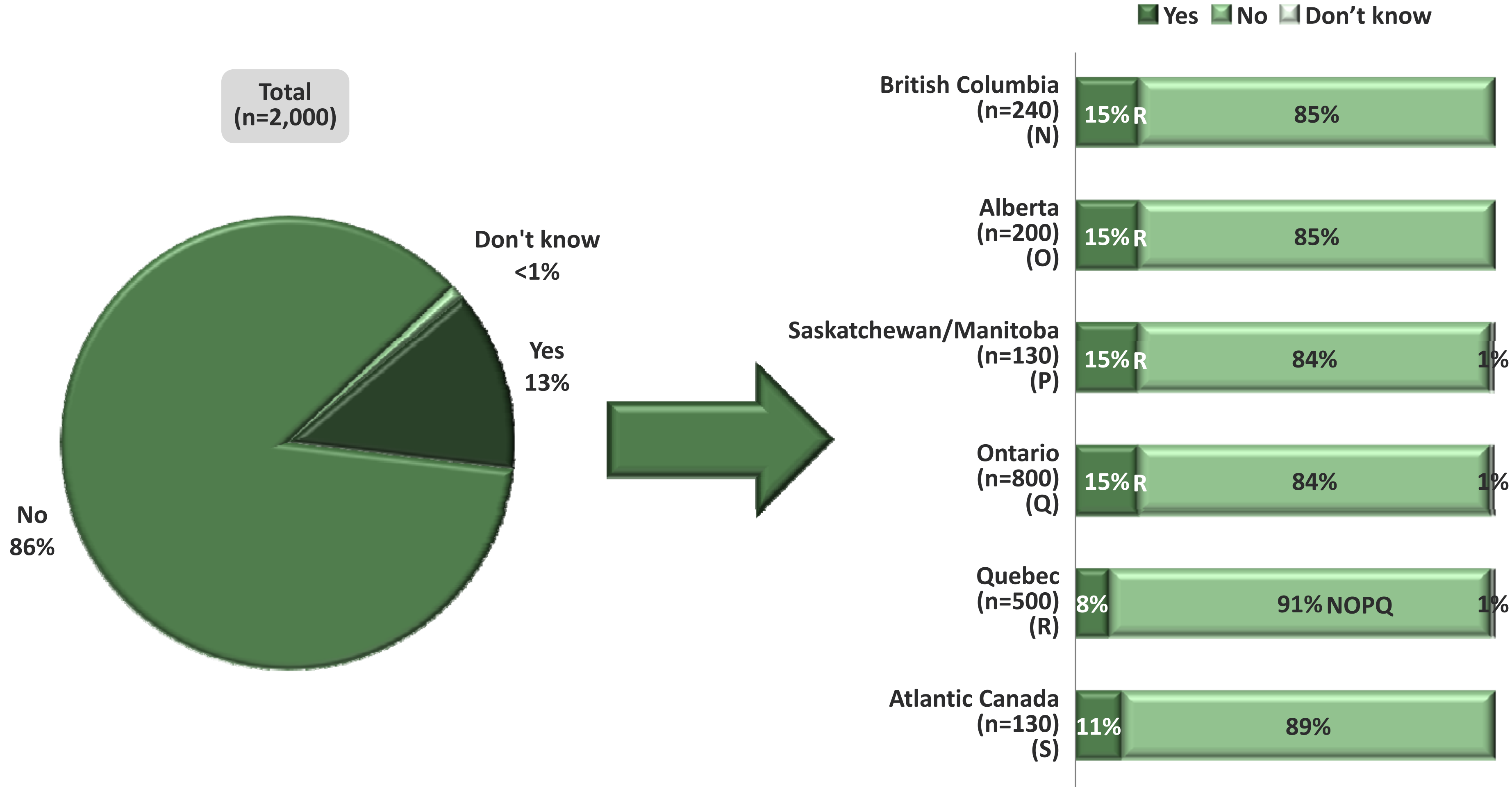
QC3. Thinking about what you currently spend on groceries, how much more would you be willing to spend on foods that are deemed to be better for you, such as Functional Foods?

Addressing Dietary & Health Concerns

Addressing Dietary & Health Concerns

- Thirteen percent of Canadians have been unable to find food or beverages needed to address a health or dietary concern.
  - Among Canadians who report at least three different health concerns in their households, 16% have looked for products but have not been able to find them to address their health or dietary concerns.
- Among those unable to find a particular product, there were a wide range of responses as to what type of product was sought after, the most common being milk/dairy related (12%).
- This suggests that, given the multitude of retail channels available, Canadians have little difficulty obtaining specific health related food products.

Unable to Address Dietary Preferences or Health Concerns – Region

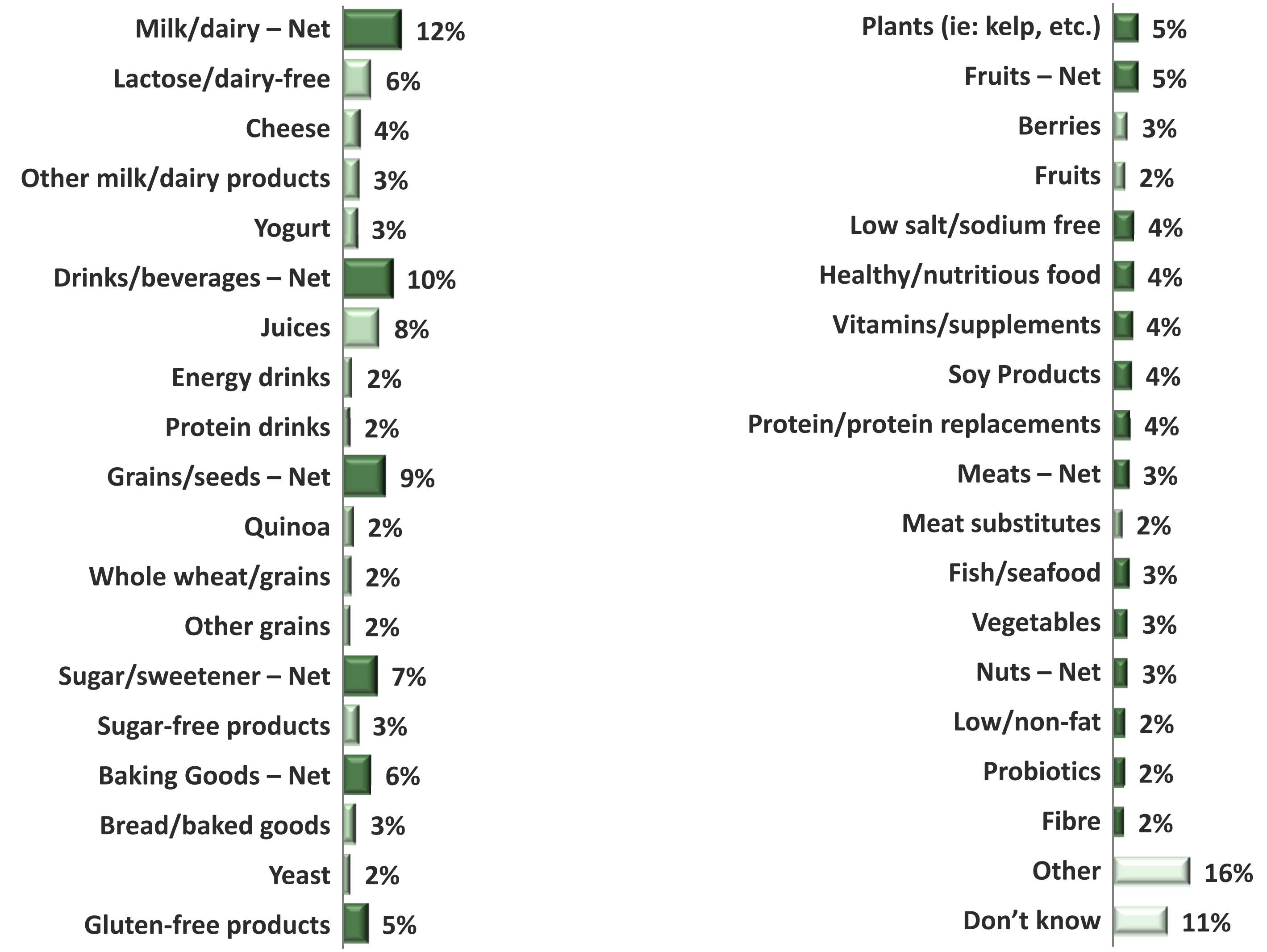


NOPQRS: Significantly higher than sub-group represented by that letter.

Base: All respondents

QC6. Have you looked for a food or beverage to address dietary preferences or health issues but were unable to find something?

Products That Canadians Were Unable to Find – All Canadians



Note: Only total mentions of 2% and higher are shown
Base: Among those unable to find something (n=268)
QC6b. What were you looking for?

Multiple Mentions

Sources of Information for Functional Foods

Sources of Information for Functional Foods

- When looking to become more informed about eating healthy and functional foods, more Canadians rely on word-of-mouth (65%) than any other source, followed by the internet (56%) and print media (55%).
- Just over half (52%) of Canadians learn more about eating healthy and functional foods from health care professionals, and one-in-five (21%) from alternative health care professionals.
    - More British Columbians (30%) seek information from alternative health care professionals than in any other region.

Sources of Information for Functional Foods – Region

	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Friends or family members	65%	63%	68%	71%	64%	61%	72% R
Online/Internet search	56%	56%	58%	51%	56%	58%	54%
Magazine or newspaper	55%	58%	48%	56%	58% OR	52%	54%
Health professional	52%	56%	53%	56%	52%	48%	56%
Scientific studies	44%	52% R	42%	42%	46% R	36%	47% R
Saw it featured at a consumer wellness TV show	35%	27%	28%	34%	32%	46% NOPQ	38% N
Product/company website	28%	30%	29%	28%	26%	29%	24%
Saw it featured at an in-store demonstration/ product sample	25%	27%	24%	30%	23%	24%	26%
Alternative health care professional	21%	30% QR	26% R	22%	20%	16%	22%
Social media	21%	24%	19%	27%	21%	19%	20%
Retailer staff	20%	27% OPQR	17%	17%	20%	19%	19%
Celebrity endorsement	3%	2%	2%	3%	4%	3%	3%
Other	3%	4%	3%	5%	4% R	2%	3%

NOPQRS: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: All respondents

QE2. Where do you typically get your information on healthy eating and functional foods?

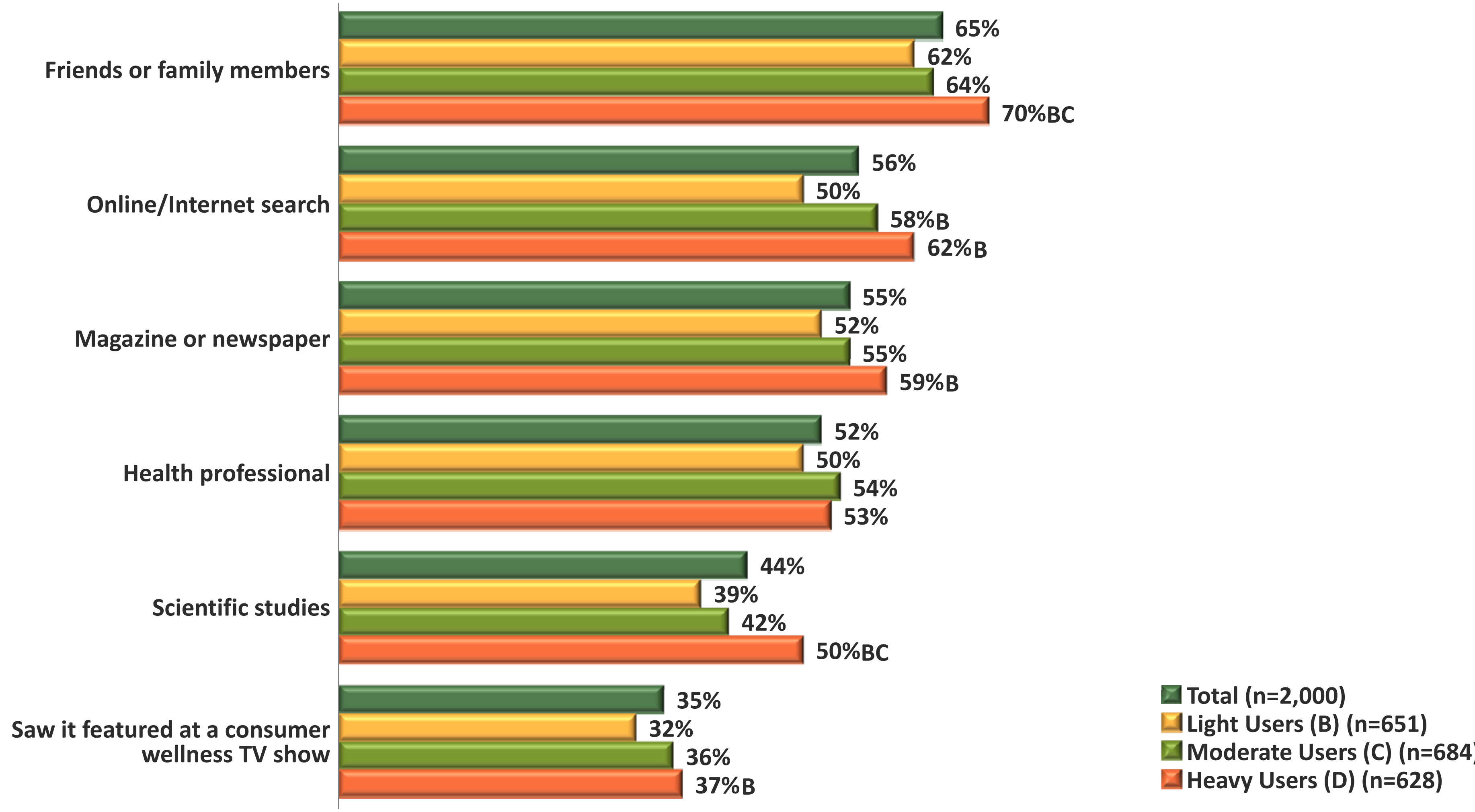
Sources of Information for Functional Foods – Age

	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Friends or family members	65%	68% F	69% F	65%	60%
Online/Internet search	56%	68% EF	64% F	58% F	43%
Magazine or newspaper	55%	45%	58% C	58% C	60% C
Health professional	52%	47%	57% C	55%	54%
Scientific studies	44%	48% F	41%	45%	40%
Saw it featured at a consumer wellness TV show	35%	28%	39% C	38% C	37% C
Product/company website	28%	31% F	33% F	29% F	22%
Saw it featured at an in-store demonstration/ product sample	25%	23%	25%	27%	25%
Alternative health care professional	21%	17%	23%	24% C	23% C
Social media	21%	26% F	22% F	22% F	17%
Retailer staff	20%	18%	22%	23%	19%
Celebrity endorsement	3%	3%	3%	5% F	3%
Other	3%	2%	3%	5%	3%

CDEF: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: All respondents

QE2. Where do you typically get your information on healthy eating and functional foods?

Sources of Information for Functional Foods – Functional Food Consumption



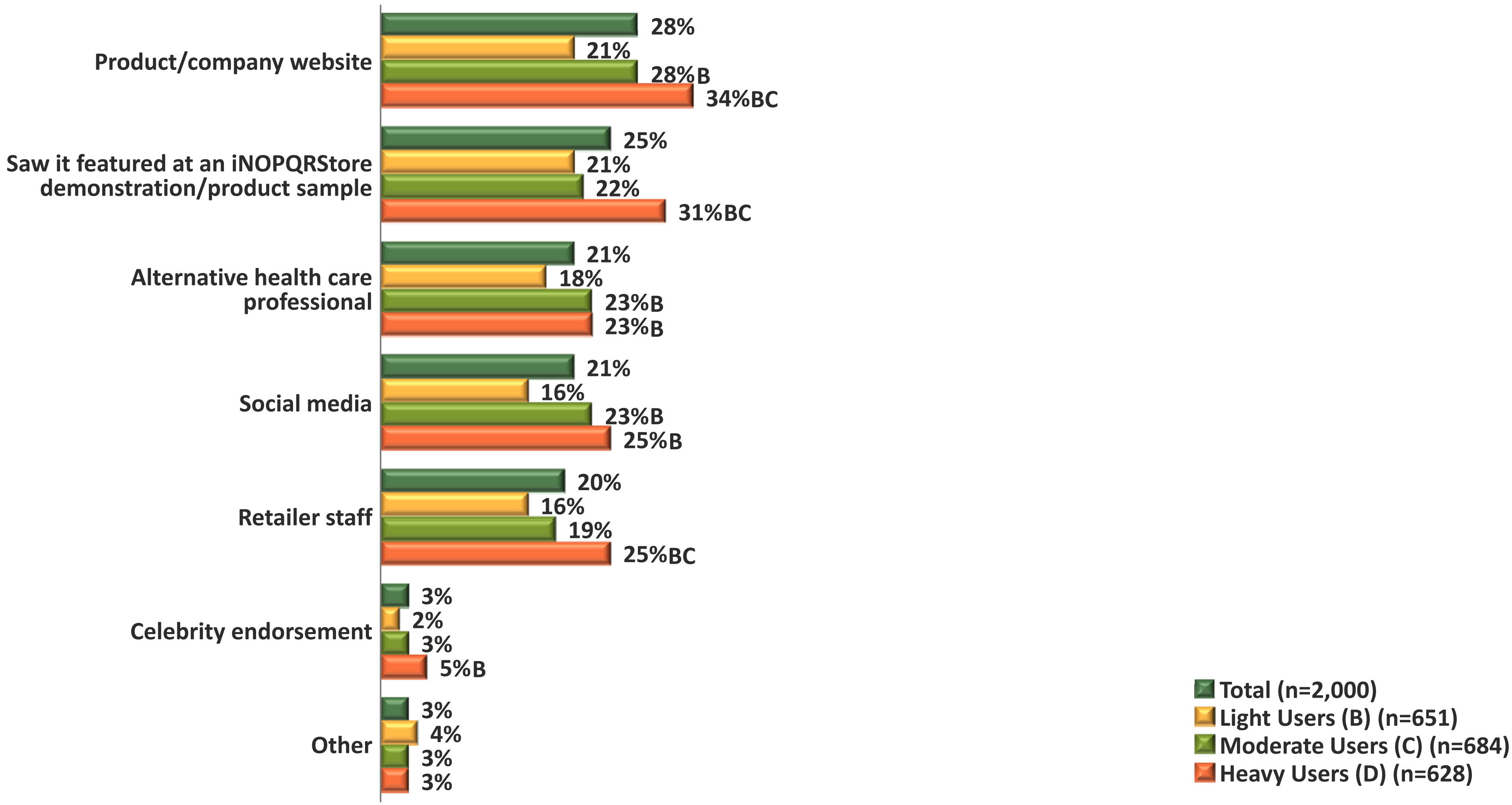
BCD: Significantly higher than sub-group represented by that letter.

Note: Only total mentions of 3% and higher are shown

Base: All respondents

QE2. Where do you typically get your information on healthy eating and functional foods?

Sources of Information for Functional Foods – Functional Food Consumption (cont'd)



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

Note: Only total mentions of 3% and higher are shown

Base: All respondents

QE2. Where do you typically get your information on healthy eating and functional foods?

Consumption of Natural Health Products

Consumption of Natural Health Products

- Over eight-in-ten Canadians use natural health products.
  - Use is highest in BC (64% use at least weekly), near average in Alberta (51%), Saskatchewan/Manitoba (50%), Ontario (50%) and Atlantic Canada (44%),
  - and the lowest in Quebec (30%). Quebecers are most likely to only use NHPs during certain seasons (39% vs. 29% Canada).
  - Those in Atlantic provinces (26%) and Quebec (23%) are most likely to <u>not</u> use NHPs (vs. 18% Canada).
- As Canadians age and develop concerns about their health, they become more likely to use natural health products:
  - 50% of those over 55 use NHPs daily, compared to 38% of those between 45 and 54, 33% of those between 35 and 44, and 23% of those between 18 and 34.
  - 51% of those with three or more health concerns in their households use NHPs at least every week, compared to 37% of those with two or fewer household health concerns.
- The most commonly used NHPs are vitamins/minerals (71% of Canadians have used), Omega-3/essential fatty acids (45%), probiotics (34%) and antioxidants (33%).
  - Albertans (54%) and British Columbians (53%) are more likely to take Omega 3/essential fatty acids than typical Canadians (45%).
  - Antioxidants are also used most often in BC (43% vs. 33% Canada), and least often in Quebec (25%).
  - Quebecers are the least likely to have taken Vitamins (56% vs. 71% Canada).
- Most frequently cited reasons for <u>not</u> using NHPs are “prefer to get nutrients from a balanced diet” (27%), “don’t believe NHPs do what they claim” (17%), “don’t need/not interested in NHPs” (14%), and “too expensive” (10%).

Consumption of Natural Health Products – Region

	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Daily	37%	50% QRS	41% R	38% R	41% R	21%	34% R
Weekly	10%	14% QR	10%	12%	8%	8%	10%
Monthly	6%	4%	5%	7%	5%	9% NQ	5%
Only during certain seasons	29%	19%	30% N	24%	27% N	39% NPQS	24%
I do not use	18%	14%	13%	17%	17%	23% NOQ	26% NOQ
Don't know	1%	–	<1%	2% N	1%	<1%	1%

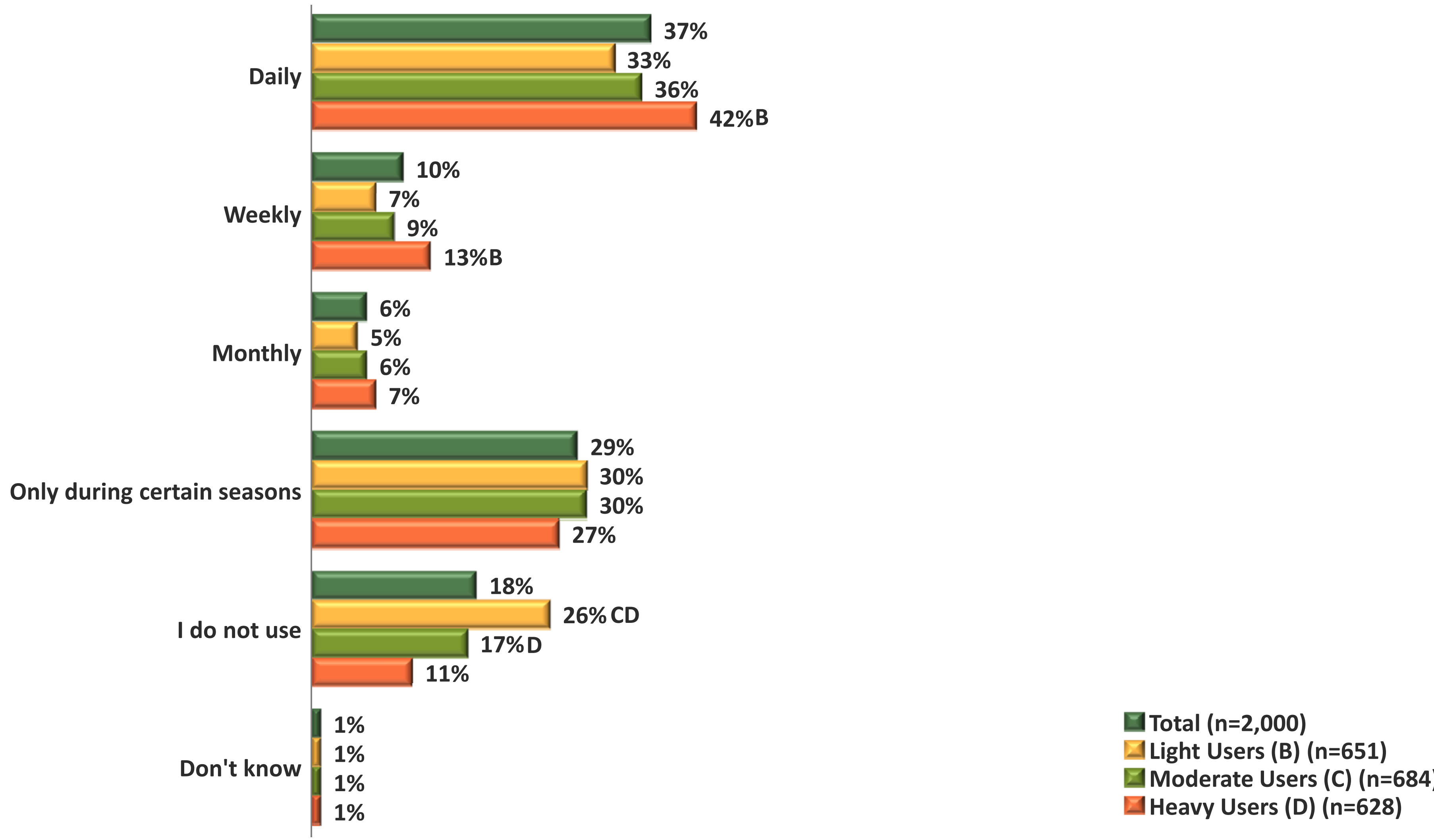
NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents
QF1. Which of the following best describes your use of natural health products? Do you use them...

Consumption of Natural Health Products – Age

	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Daily	37%	23%	33% C	38% C	50% CDE
Weekly	10%	10%	12%	9%	8%
Monthly	6%	9% F	6%	5%	5%
Only during certain seasons	29%	40% DEF	31% F	28% F	20%
I do not use	18%	18%	17%	20%	18%
Don't know	1%	0%	1%	1%	1%

CDEF: Significantly higher than sub-group represented by that letter.
Base: All respondents
QF1. Which of the following best describes your use of natural health products? Do you use them...

Consumption of Natural Health Products – Functional Food Consumption



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

Base: All respondents

QF1. Which of the following best describes your use of natural health products? Do you use them...

Types of Natural Health Products Used – Region

	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Vitamins/minerals	71%	77% R	80% RS	79% R	74% R	56%	69% R
Omega 3/essential fatty acids	45%	53% QRS	54% QRS	44%	43%	41%	36%
Probiotics	34%	41% PS	36% P	24%	34% P	35% P	27%
Antioxidants	33%	43% PQRS	39% R	30%	35% R	25%	29%
Essential oils	32%	41% QRS	36% S	33%	31%	29%	25%
Homeopathic medicines/ tinctures/homeopathy	20%	29% QRS	26% Q	21%	16%	19%	18%
Other	10%	10%	14%	10%	9%	9%	8%
None of the above	3%	2%	2%	1%	2%	4% Q	2%

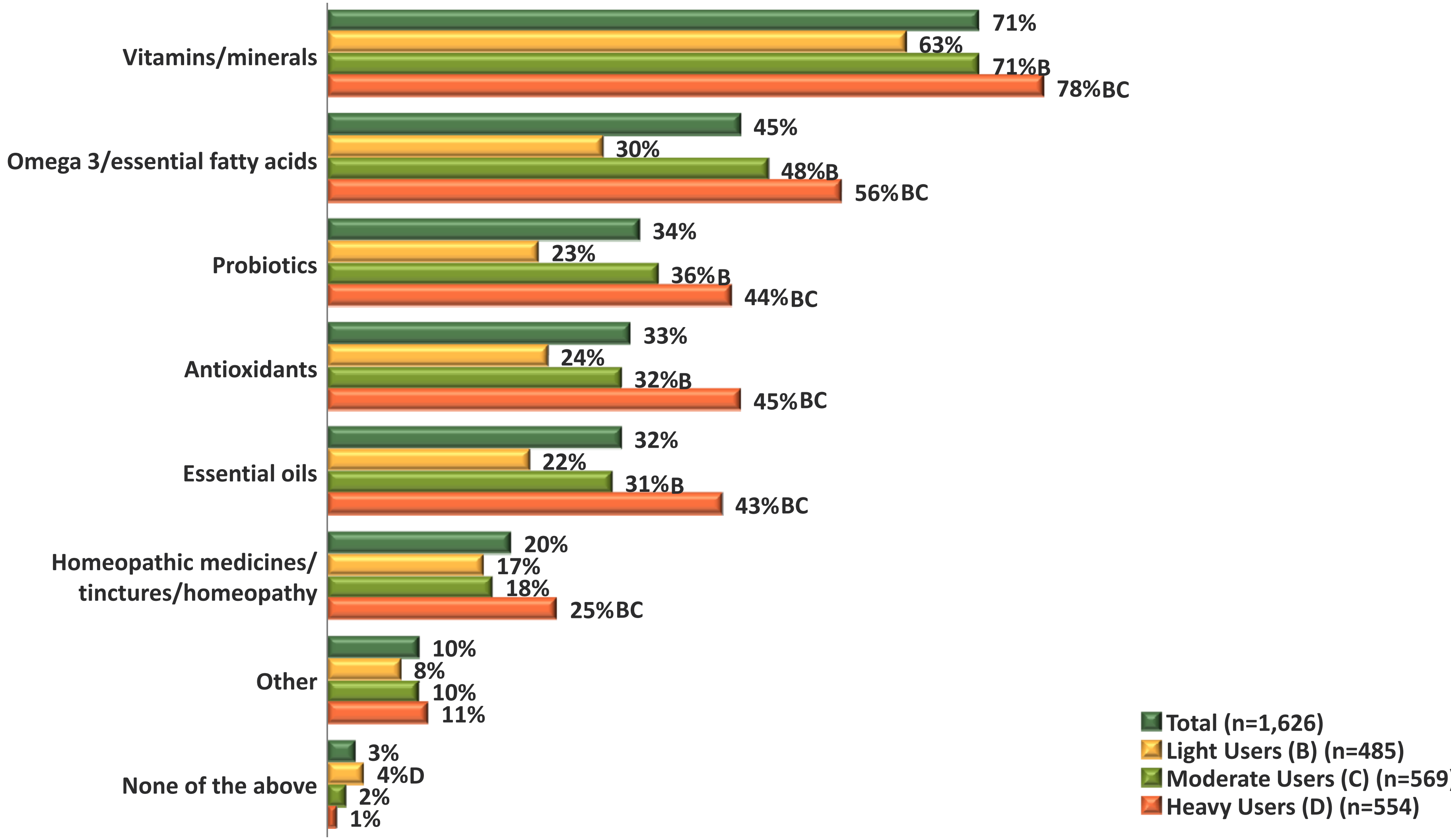
NOPQRS: Significantly higher than sub-group represented by that letter.
Base: Among those who have used natural health products
QF2. Which natural health products, sold in dosage form, have you ever used?

Types of Natural Health Products Used – Age

	Total (n=2,000)	18 to 34 (n=253) (C)	35 to 44 (n=317) (D)	45 to 54 (n=477) (E)	55+ (n=917) (F)
Vitamins/minerals	71%	71%	73%	68%	72%
Omega 3/essential fatty acids	45%	40%	45%	47%	47% C
Probiotics	34%	34%	37%	38%	33%
Antioxidants	33%	31%	35%	37%	33%
Essential oils	32%	31%	32%	35%	32%
Homeopathic medicines/ tinctures/homeopathy	20%	17%	23%	25% CF	18%
Other	10%	7%	8%	15% CDF	9%
None of the above	3%	2%	4%	2%	2%

CDEF: Significantly higher than sub-group represented by that letter.
Base: Among those who have used natural health products
QF2. Which natural health products, sold in dosage form, have you ever used?

Types of Natural Health Products Used – Functional Food Consumption

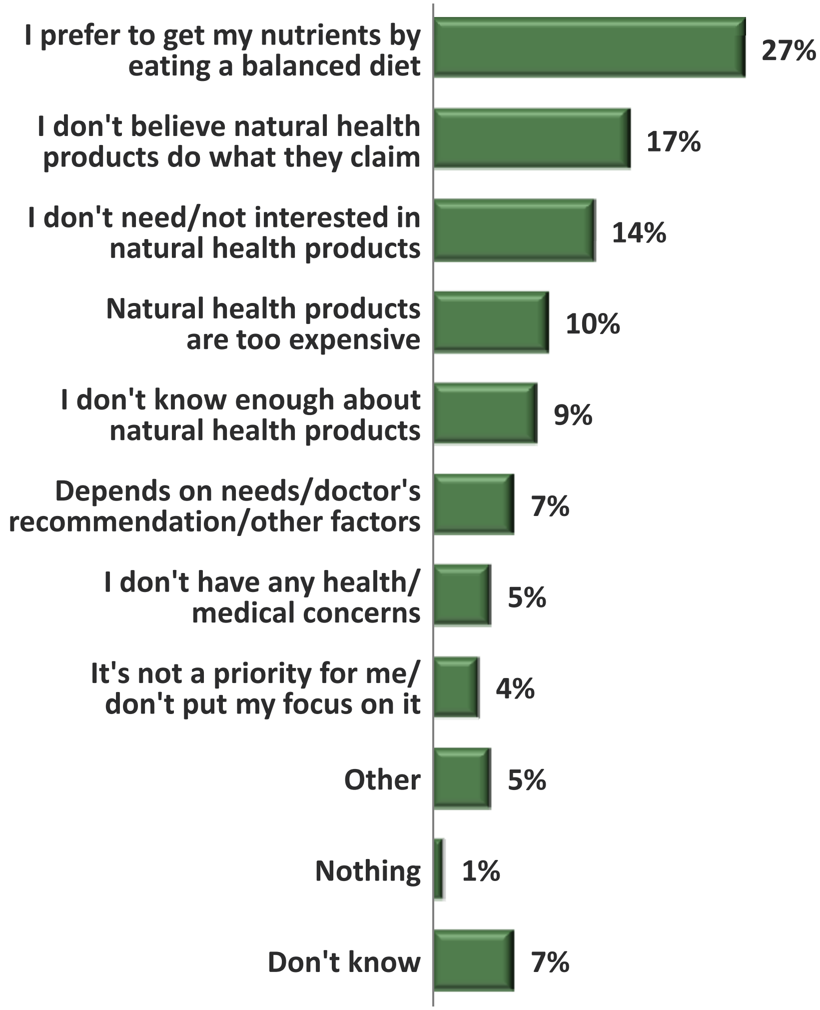


BCD: Significantly higher than sub-group represented by that letter.

Base: Among those who have used natural health products

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

Reasons for Not Consuming Natural Health Products – Total



Note: Only total mentions of 3% and higher are shown.

Base: Among those who are not likely to purchase natural health products (n=874)

QF4. And why do you feel that way?

Purchasing Natural Health Products

Purchasing Natural Health Products

- NHPs are most often bought at grocery stores (65%), pharmacies/drug stores (59%) and mass retailers (47%), followed closely by natural health food (45%) and organic grocery stores (24%).
  - Almost one-in-ten Canadians (9%) purchase NHPs directly from online retailers. This trend is most prominent in Western Canada, especially Alberta (16%) and British Columbia (13%), and it appears to be unrelated to age.
- Those in BC (66%) and Alberta (65%) are most likely to purchase natural health products in the future. Purchase intent is lowest in Quebec (49%) and Atlantic Canada (52%).
- Heavy functional food users (69%) are also most likely to purchase NHPs in the future, compared to moderate (56%) and light users (43%).

Retail Locations for Natural Health Products – Region

	% Yes						
	Total (n=1,611)	British Columbia (n=205) (N)	Alberta (n=172) (O)	Saskatchewan/ Manitoba (n=107) (P)	Ontario (n=654) (Q)	Quebec (n=378) (R)	Atlantic (n=95*) (S)
Grocery stores	65%	71% R	71% R	72% R	67% R	50%	79% QR
Pharmacy/drug stores	59%	61%	53%	53%	60%	60%	68% O
Mass retailers (e.g., Walmart, Costco)	47%	49% R	55% R	57% R	49% R	35%	56% R
Natural Health food stores	45%	52% R	46%	50%	44%	42%	43%
Organic grocery stores	24%	34% PQRS	26%	22%	21%	25%	19%
Natural health practitioner	16%	19%	20%	14%	16%	14%	11%
Direct from an online retailer	9%	13% R	16% QR	11%	8%	6%	8%
Through home shopping parties or catalogues	5%	3%	7%	5%	5%	5%	4%
Other	4%	7% Q	4%	3%	2%	4%	7% Q
Nothing	<1%	<1%	1%	–	<1%	<1%	–
Don't know	1%	1%	<1%	1%	1%	3% Q	–

NOPQRS: Significantly higher than sub-group represented by that letter.
*Small base size, interpret with caution.
Base: Among those who use natural health products

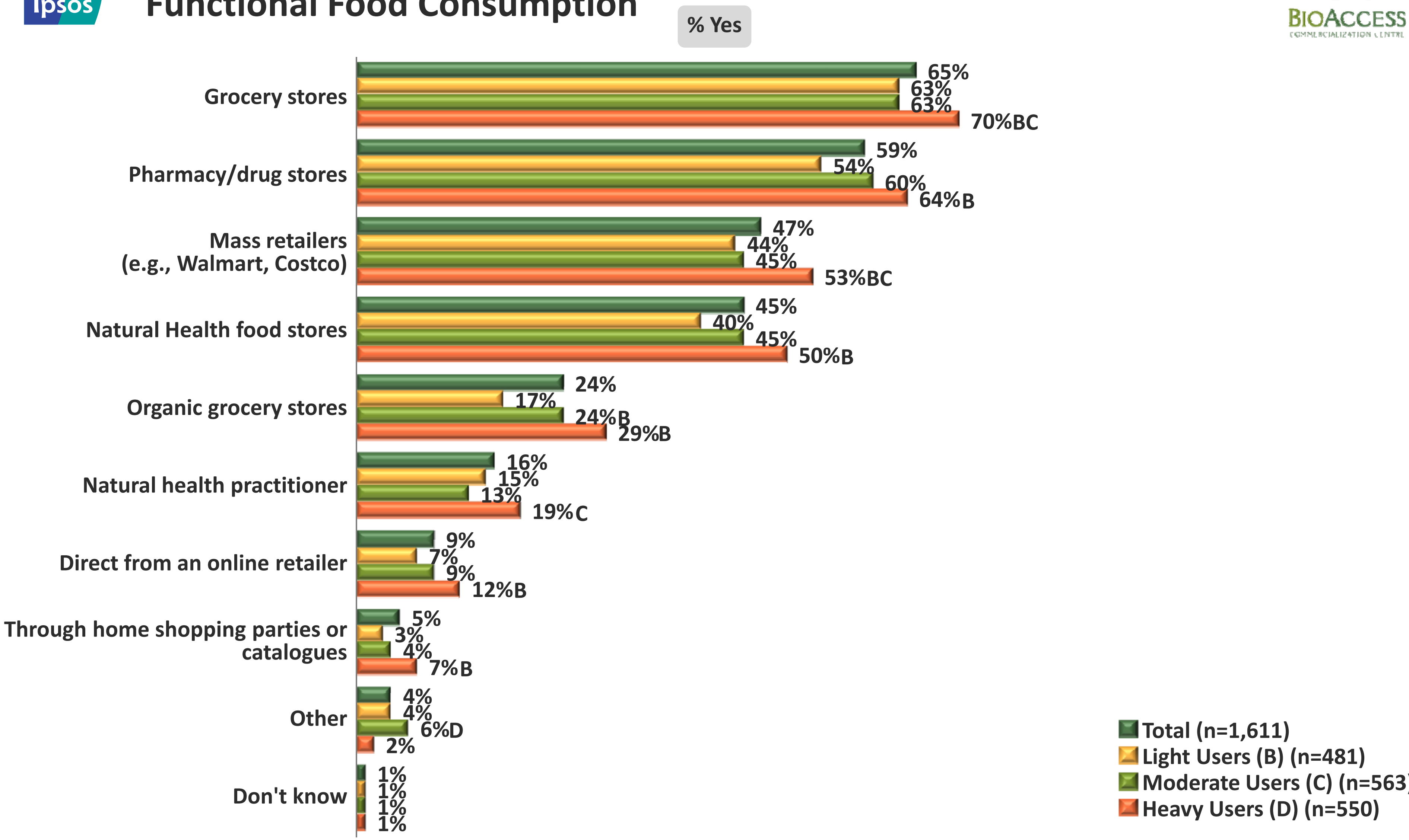
QF5. From which of the following retail outlets do you buy natural health products?

Retail Locations for Natural Health Products – Age

	% Yes				
	Total (n=1,611)	18 to 34 (n=207) (C)	35 to 44 (n=262) (D)	45 to 54 (n=374) (E)	55+ (n=743) (F)
Grocery stores	65%	69%	69% F	63%	62%
Pharmacy/drug stores	59%	59%	57%	59%	61%
Mass retailers (e.g., Walmart, Costco)	47%	54% F	45%	48%	43%
Natural Health food stores	45%	38%	51% C	49% C	47% C
Organic grocery stores	24%	24%	23%	29% F	22%
Natural health practitioner	16%	12%	16%	22% CF	15%
Direct from an online retailer	9%	8%	10%	13% F	8%
Through home shopping parties or catalogues	5%	6%	6%	5%	3%
Other	4%	3%	4%	5%	5%
Don't know	1%	2%	–	1%	1%

CDEF: Significantly higher than sub-group represented by that letter.
Base: Among those who use natural health products
QF5. From which of the following retail outlets do you buy natural health products?

Retail Locations for Natural Health Products – Functional Food Consumption

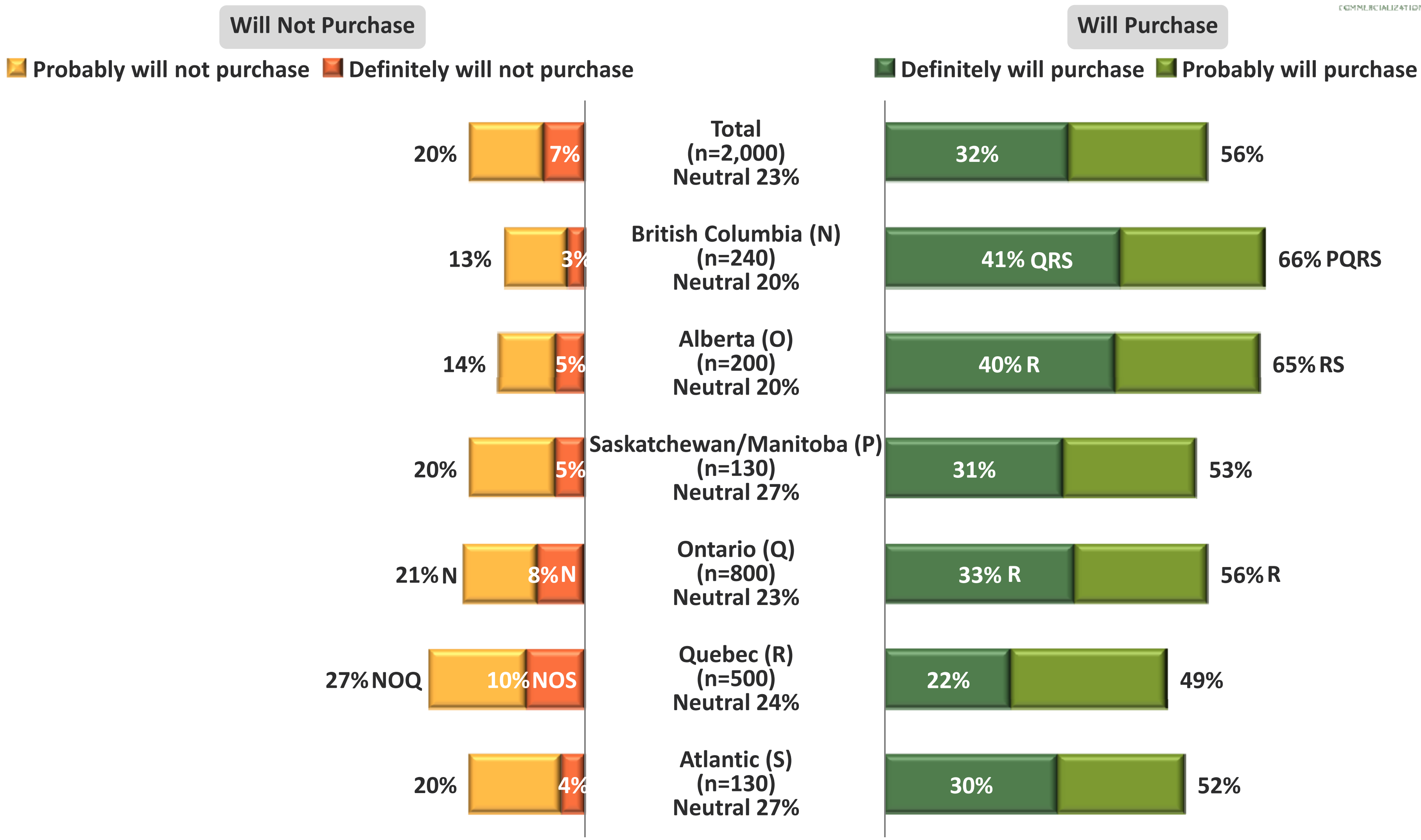


BCD: Significantly higher than sub-group represented by that letter.

Base: Among those who use natural health products

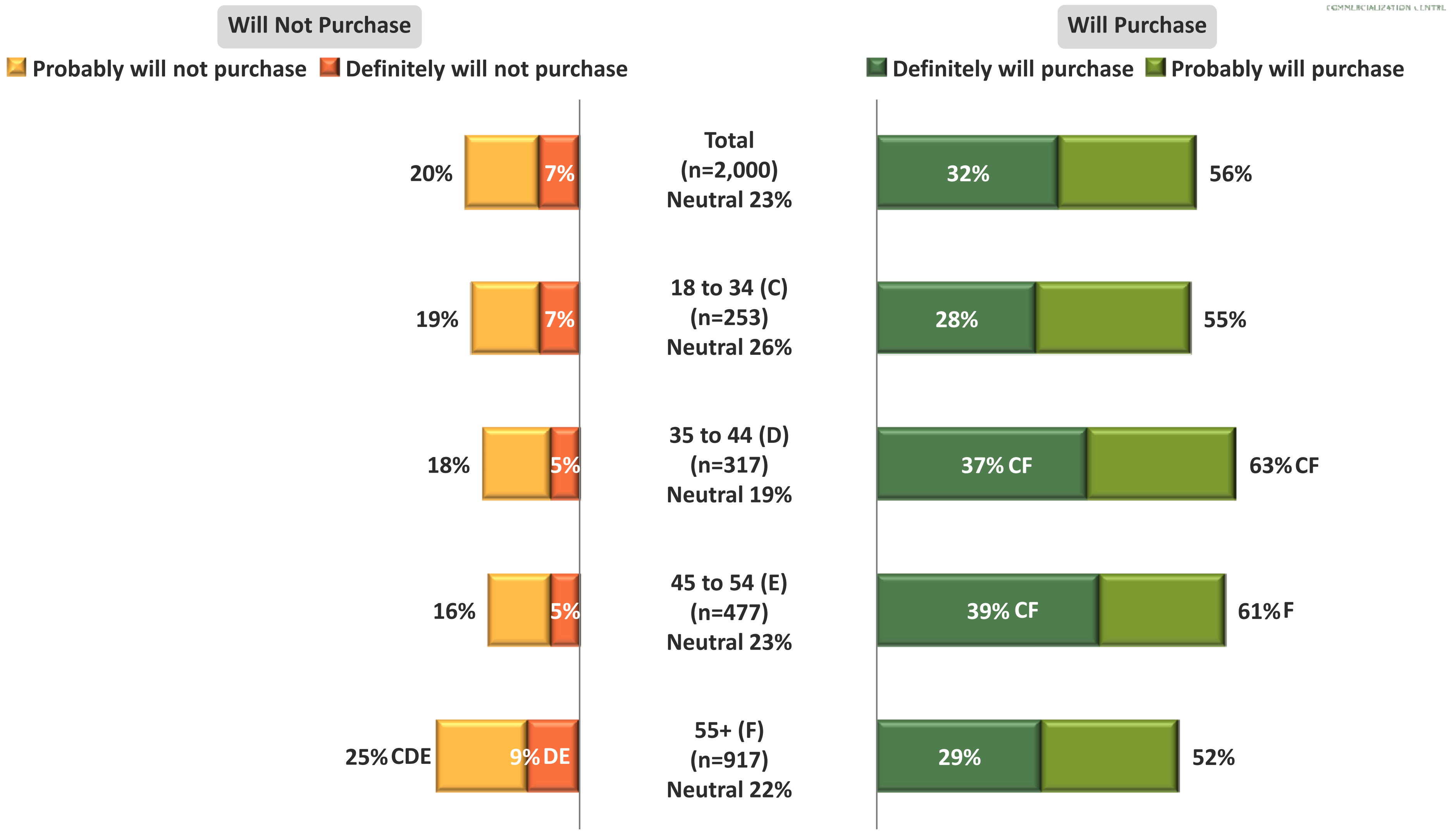
QF5. From which of the following retail outlets do you buy natural health products?

Likelihood to Purchase Natural Health Products – Region



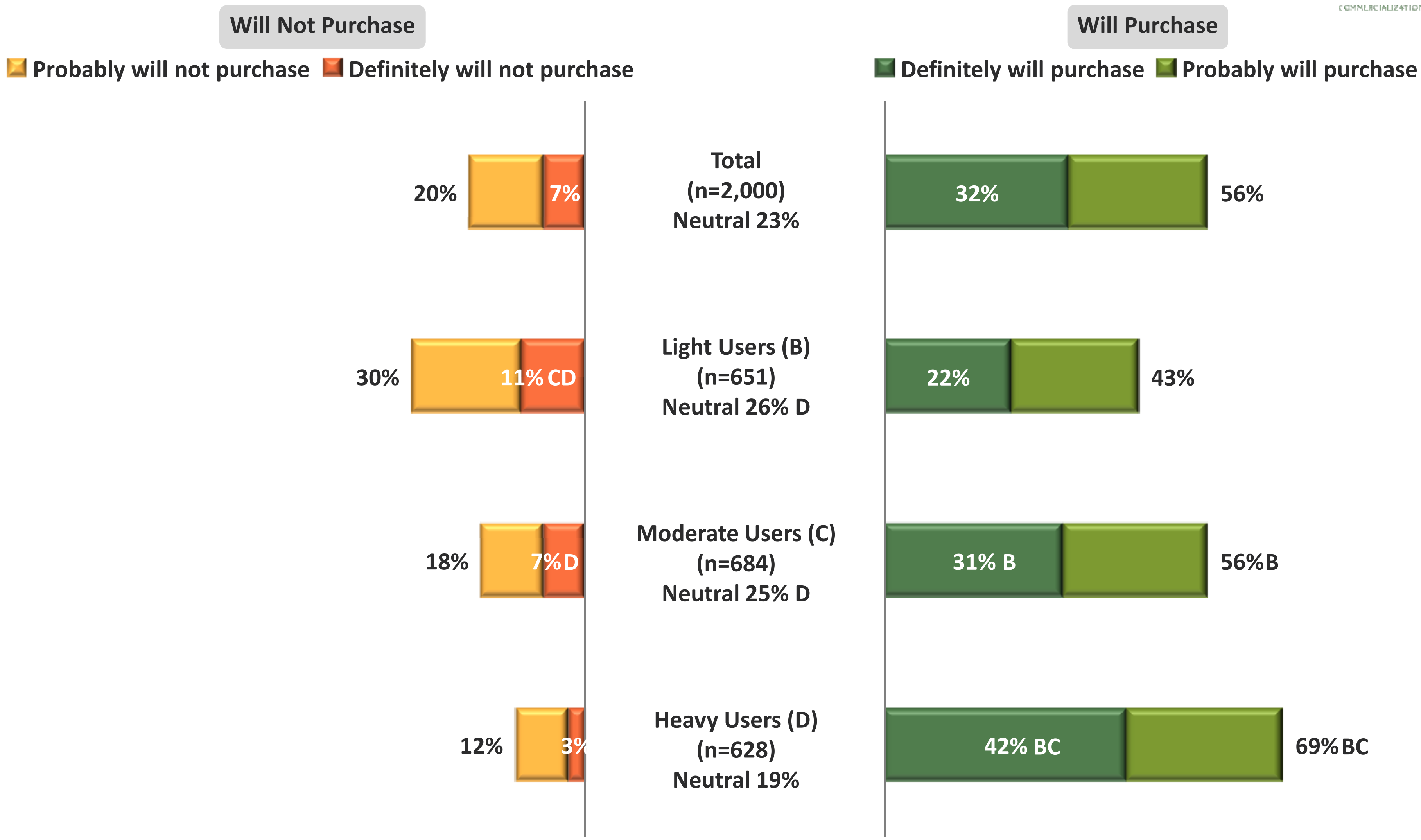
NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents
QF3. How likely would you be to purchase natural health products in the future?

Likelihood to Purchase Natural Health Products – Age



CDEF: Significantly higher than sub-group represented by that letter.
Base: All respondents
QF3. How likely would you be to purchase natural health products in the future?

Likelihood to Purchase Natural Health Products – Functional Food Consumption



BCD: Significantly higher than sub-group represented by that letter.
Base: All respondents
QF3. How likely would you be to purchase natural health products in the future?

Questions?
Thank you!

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Demographics

Demographics – Region

	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Gender							
Male	49%	48%	51%	47%	48%	49%	49%
Female	52%	52%	49%	53%	52%	51%	51%
Age							
18 to 34	28%	20%	27%	22%	28% NS	37% NOPQS	19%
35 to 54	35%	28%	40% N	38%	35%	35%	40% N
55+	35%	49% OQR	31%	40% R	35% R	27%	40% R
Mean	*47.6 years*	*53.2 years OQR*	*46.2 years*	*49.8 years R*	*47.5 years R*	*43.9 years*	*50.5 years OR*
Income							
Under $35,000	16%	16%	11%	19%	15%	19% O	15%
$35,000 to under $49,999	15%	18% Q	13%	15%	11%	21% OQ	21% Q
$50,000 to under $74,999	15%	17%	11%	15%	15%	16%	19% O
$75,000 to under $99,999	14%	6%	17% N	12%	15% N	14% N	17% N
$100,000 to under $149,999	15%	16%	16%	14%	16%	13%	10%
$150,000 or more	10%	8%	18% NQRS	11%	12% RS	7%	6%

NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents

Demographics – Region (cont'd)

	Total (n=2,000)	British Columbia (n=240) (N)	Alberta (n=200) (O)	Saskatchewan/ Manitoba (n=130) (P)	Ontario (n=800) (Q)	Quebec (n=500) (R)	Atlantic (n=130) (S)
Who Makes the Household Grocery List							
Yourself	70% Q	64%	68%	62%	66%	64%	70% Q
Partner/spouse	20%	25%	23%	22%	21%	30% N	20%
Other family member	6% S	5%	5%	11% OS	8% S	1%	6% S
Other	3%	6%	4%	5%	5%	4%	3%
% Of Household Grocery Shopping							
All	42%	45%	43%	42%	40%	43%	41%
Almost all	20%	20%	23%	23%	21%	19%	21%
About half	18%	16%	17%	15%	18%	20%	19%
Less than half	15%	18%	14%	15%	15%	15%	15%
None	4%	1%	3%	3%	6% N	3%	4%
Weekly Household Spending on Groceries							
<$50	7%	9%	6%	11%	8%	5%	4%
$50 to $100	32%	30%	29%	29%	33%	31%	42%
$100 to $200	44%	41%	41%	43%	44%	47%	42%
>$200	13%	15%	21%	10%	11%	15%	11%
DK/NS	4%	5%	4%	8%	4%	3%	1%
Mean	*$151*	*$157*	*$167 QRS*	*$146*	*$146*	*$152*	*$138*

NOPQRS: Significantly higher than sub-group represented by that letter.
Base: All respondents

Demographics – By Functional Food Use

	Total (n=2,000)	Light Users (n=651) (B)	Moderate Users (n=684) (C)	Heavy Users (n=628) (D)
Gender				
Male	49%	48%	49%	48%
Female	52%	52%	51%	52%
Age				
18 to 34	28%	22%	27% B	36% BC
35 to 54	35%	31%	36%	39% B
55+	35%	45% CD	35% D	24%
Mean	*47.6 years*	*51.7 years CD*	*47.7 years D*	*43.1 years*
Income				
Under $35,000	16%	21% CD	14%	12%
$35,000 to under $49,999	15%	17%	17%	13%
$50,000 to under $74,999	15%	16%	14%	16%
$75,000 to under $99,999	14%	14%	13%	14%
$100,000 to under $149,999	15%	10%	16% B	18% B
$150,000 or more	10%	5%	9% B	16% BC

BCD: Significantly higher than sub-group represented by that letter.
Base: All respondents

Demographics – By Functional Food Use (cont'd)

	Total (n=2,000)	Light Users (n=651) (B)	Moderate Users (n=684) (C)	Heavy Users (n=628) (D)
Who Makes the Household Grocery List				
Yourself	70% Q	68% D	64%	61%
Partner/spouse	20%	21%	24%	22%
Other family member	6% S	6%	8%	10% B
Other	3%	5%	3%	5%
% Of Household Grocery Shopping				
All	42%	48% D	43% D	36%
Almost all	20%	18%	21%	22%
About half	18%	16%	17%	21% B
Less than half	15%	11%	17% B	17% B
None	4%	6% CD	2%	3%
Weekly Household Spending on Groceries				
<$50	7%	13%	5%	3%
$50 to $100	32%	38%	36%	24%
$100 to $200	44%	40%	42%	50% BC
>$200	13%	7%	13%	21%
DK/NS	4%	4%	4%	3%
Mean	*$151*	*$128*	*$148 B*	*$175 BC*

BCD: Significantly higher than sub-group represented by that letter.
Base: All respondents