



Ipsos Reid



Factors Influencing Pulse Consumption in Canada

Summary Report

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February 2010



**Government
of Alberta**

This research was conducted by Ipsos Reid in partnership with Alberta Agriculture and Rural Development, with the direction and collaboration of Alberta Pulse Growers Commission and Pulse Canada.

Government of Alberta ■
Agriculture and Rural Development



Pulse Canada 

EXECUTIVE SUMMARY

Between December 9th and 23rd, 2009, Ipsos Reid conducted a total of 1,100 online interviews with a representative sample of Canadians aged 18 and older, and 230 interviews with South Asian immigrants who have lived in Canada for 20 years or less. Additionally, Ipsos Reid conducted a total of four focus groups with Canadian adults – two in Edmonton on January 26th and two in Toronto on January 28th, 2010.

Pulse consumption among Canadians is low

- Overall, 20% indicate they have not consumed any type of pulse at home or at a restaurant during the past six months. The majority (60%) report they have consumed one or more types of pulses at home in the past six months – either one to three times per month or less than once a month. Just 20% report consuming at least one type of pulse on a weekly basis at home.
- Less than half (41%) have consumed any type of pulse at a restaurant in the past six months. Among restaurant pulse consumers, only one-quarter eat pulses at restaurants monthly or more often,
- The estimated average weekly cooked pulse consumption among Canadians who report having consumed pulses in the past six months is 1.3 cups and the median is 0.9. This drops to an average of 1.0 cups and a median of 0.6 cups when all Canadians are taken into account. The median provides the better estimation of pulse consumption among Canadians given the wide variation in reported consumption. *Please note, a number of estimations and assumptions were used in order to approximate average weekly cooked pulse consumption. This is by no means an accurate measure and should be considered a rough estimate only.*

Pulse consumption differs by type of pulse, with past six months consumption highest for beans and lowest for lentils

- One-in-five Canadians report they have not consumed any pulses in the past six months. Overall, two-in-three (66%) Canadian adults indicate they have consumed beans in the past six months. This drops to just over half with regard to chickpeas (53%) and peas (52%), while consumption of lentils is limited to four-in-ten (41%) Canadians
- Among those who have consumed pulses at home in the past six months, frequency of consumption does not vary markedly by type of pulse.

Pulse consumption varies by a number of socio-demographic and health factors.

- Pulse consumption tends to be lower among Canadians aged 18 to 34, higher among those with a university education, lower in single person households and higher among those not born and raised in Canada.
- There is a strong linkage between vegetarianism/veganism and pulse consumption and a moderate linkage between chronic disease and pulse consumption, however, weight and pulse consumption have a weak linkage.

Not liking the taste or texture of pulses and not knowing how to cook or prepare pulses are the most frequent top-of-mind reasons for not eating pulses

- Interestingly, taste (or liking pulses) is also the most frequent reason given for eating pulses. The health benefits of pulses (healthy, a source of protein, a source of fibre) are also a key motivator for consumption.

On an aided basis, ‘not thinking about including pulses in meal planning or preparation’ and ‘not knowing how to cook or prepare pulses’ are the biggest limitations to consumption.

- ‘Not liking the taste of pulses’ and ‘family members not liking to eat pulses’ are barriers for a sizeable minority.
- It is notable that only one-third of Canadians agree that ‘pulses are part of their traditional diet’ or that they ‘are trying to choose vegetarian meals more often’.

When asked to trade off the importance of a number of factors, health benefits and taste emerge as the two most important factors when deciding whether or not to eat pulses.

- Being a source of protein and increasing fibre intake are also important, though relatively lower on the scale. It is notable, however, that being a less expensive protein is not a top factor, nor are digestive considerations. Also, compared to the importance of protein and fibre, the low fat content of pulses is a relatively less important factor.

Communicating a number of facts related to personal health could increase the likelihood of pulse consumption among Canadians; environmental benefits, however, would have a lesser impact.

- Canadians’ attitudes towards food and health indicate that the majority are concerned about maintaining their health – eating a healthy diet and weight control; and take actions to do so – look for healthy snacks, look at nutritional labels and exercise.
- Given the nutritional and health benefits of pulses, this is a positive for the pulse industry. So too is the finding that three-in-four Canadians ‘like to try out new or different types of foods and recipes’, and that about six-in-ten ‘enjoy eating ethnic foods’ traditionally high in pulses.
- It is interesting that the ‘made/ grown in Canada label’ is a consideration in food purchases for a strong majority of Canadians, while sustainable agricultural practices are comparatively less important.

While family is a key source for information about healthy eating and recipes, cookbooks, Canada’s Food Guide, health professionals, grocery stores, newspapers, magazines and the Internet are all good channels for communicating with Canadians about pulses.

Segmentation analysis identified five distinct groups of consumers based on their attitudes towards pulses as well as food and health.

- Positioned at one end of the spectrum are the “Informed Champions” who embrace pulses and all their benefits, while at the opposite end are the “Disinterested Unreachables,” a group who are unlikely to make pulses a regular part of their diet. The three segments in between – the “Unexposed Reachables,” the “Forgetful Proponents” and the “Health Driven Persuadables” –

are the **most attractive segments to target** in terms of the potential to increase pulse consumption.

- **Unexposed Reachables (23%):** For Unexposed Reachables, pulses generally fall outside their consideration set with regards to meal planning or preparation. While they have not had a great deal of exposure to pulses, the health benefits of pulses resonate strongly. They should be a primary target segment as current consumption is low, but the main barrier is lack of exposure, and communicating information about the health benefits could effectively drive them to increase their pulse consumption. Teaching them how to cook a variety of ‘great tasting’ basic recipes (i.e. not ethnic or vegetarian options), and focusing on the health benefits of pulses – including weight management – should be the focus of targeted communications.
- **Forgetful Proponents (23%):** Forgetful Proponents have the second highest pulse consumption among the segments – they enjoy pulses, but need to be reminded to include them in their diet more often. Given that 70% of Forgetful Proponents are monthly (light) pulse consumers, there is an opportunity to move them to weekly (moderate to heavy) consumption, particularly given that the vast majority like the taste of pulses. Teaching them the wide variety of ways pulses can be used, and providing new and different recipes, could increase their pulse consumption. As they like to try out different foods and recipes, as well as enjoy ethnic foods, there are no limits to the types of recipes that might appeal. Weekly emails of pulse recipes could appeal to this segment. Reminding them about the fibre and protein content of pulses, as well as other health benefits, could also serve as motivators.
- **Health Driven Persuadables (22%):** The taste, health benefits and environmental benefits of pulses all appeal to Health Driven Persuadables – moving from light to moderate consumption would not be a big stretch. Given that the main barriers to greater consumption of pulses are not knowing how to cook or prepare them, and not thinking about them in meal planning, persuading consumers in this segment to increase their pulse consumption seems quite feasible. Particularly since they like trying new and different foods and recipes, they like ethnic foods, and many are trying to choose vegetarian meals more often. To offset their busy lifestyle, quick recipes or ‘5-ingredient’ recipes might be particularly appealing. Teaching them how to cook pulses and providing a variety of recipes, along with communicating the health benefits of pulses, should be the primary focus when targeting this segment – with some mention of environmental benefits.

When developing messaging, advertising and communications targeting the Canadian public, it is important to keep the following in mind:

- **People don’t know what pulses are.** Most people are not familiar with the term ‘pulses’ – it needs to be spelled out explicitly in any advertising or communications. **Pictures of pulse dishes are not enough – people do not know enough to identify the ‘pulse’ among other ingredients.** For example, in picture of a salad including beans, tomatoes, corn and cilantro, many Canadians would not be able to identify beans as the pulse. Perhaps the most effective tagline is simply ‘beans, peas, lentils, chickpeas’ in large enough font to be clearly seen.
- **Colourful, delicious looking dishes are a must.** Visually appealing pictures are key in any communications or messaging targeting the public – they will make people stop and take notice.
- **Variety is a well kept secret.** Even pulse consumers aren’t aware of the tremendous variety of dishes that can be made with pulses, and the different varieties of pulses themselves. Quick &

easy recipes, ethnic recipes, child-friendly recipes and gourmet meals all have their appeal. Further, most pulse consumers tend to use pulses in side dishes (e.g. soup, salad, dips) rather than as a main part of their meals – elevate pulses from their side dish status.

- **The Internet is key.** A website address where consumers can find recipes should be a critical component for any advertising or communications. **The Internet should be an essential part of any communications strategy.**
- **High level nutritional and health benefits resonate the most strongly with consumers.** For example, live healthy, be heart healthy, packed with protein, high in fibre or low in saturated fat. People are skeptical of specific health benefits and research claims.
- **The environment should be a secondary focus.** While the environment is important to many, it should be a secondary message – preserving and protecting the environment is unlikely to drive people to increase their pulse consumption.
- **The ‘grown in Canada’ or ‘locally grown’ message, however, is meaningful.** This message does resonate with many and could influence purchase and consumption decisions.
- **Weight management is important to Canadians, but...** Information around pulse consumption and weight management definitely resonates with many consumers, however, it should not be the major focus of advertising or the key reason given for consuming pulses.
- **Communicating at the point of purchase could be effective.** In addition to the Internet and traditional media such as newspapers and magazines, distributing information alongside food displays (or tastings) could be a fruitful channel.

South Asian immigrants are a viable market for pulse products.

- Pulse consumption is very high.
- Pulse consumption does not decline significantly with tenure in Canada.
- Purchase and consumption of non-traditional forms and dishes (e.g. canned beans, lentil soup, hummus) increases with tenure.
- The facts that pulses are very high in fibre, free of fats and saturated fats, help reduce the risks of diabetes, have a low Glycemic Index and are gluten free, resonate strongly with South Asian immigrants, perhaps reflective of the finding that the incidence of diabetes is significantly higher than among Canadian adults.
- As with the broader Canadian public, South Asian immigrants’ attitudes towards food and health indicate that the majority are concerned about maintaining their health and take actions to do so.
- Thus, messaging targeted at the broader public regarding the health benefits of pulses should also resonate with South Asian immigrants.
- The pulse industry may wish to further explore the appeal of processed and/or pre-prepared pulse products among this segment.

SUMMARY OF KEY FINDINGS

Background and Methodology

Apart from estimates of per capita consumption, there was a decided lack of publicly available information about pulse consumption in Canada. Information about the motivators and barriers to consuming pulses, and the influence of socio-demographic characteristics and health factors on pulse consumption was absent.

As such, Alberta Agriculture and Rural Development (ARD) wished to conduct quantitative and qualitative research to evaluate the factors influencing pulse consumption in Canada – that is, the *who*, *what*, *where* and *why* of Canadian pulse consumption. This project was carried out by Alberta Agriculture and Rural Development, with the direction and collaboration of Alberta Pulse Growers Commission and Pulse Canada.

Primary research objectives included:

- Evaluating the key factors that are influencing Canadians' pulse consumption with a focus on: types, frequency and form; motivators and barriers; and the influence of information.
- Providing information that can be used by industry associations and government to form targeted marketing and promotion material for producers, processors and health care professionals.

Given that South Asians are traditionally heavy consumers of pulses, and the large South Asian population in Canada, conducting research with this segment was a secondary research objective.

In order to realize the research objectives, Ipsos Reid utilized two distinct approaches:

- 1) Quantitative Research – Between December 9th and 23rd, 2009, Ipsos Reid conducted a total of 1,100 online interviews with a representative sample of Canadians aged 18 and older, and 230 interviews with South Asian immigrants who have lived in Canada for 20 years or less.
- 2) Qualitative Research – Ipsos Reid conducted a total of four focus groups with Canadian adults – two in Edmonton on January 26th and two in Toronto on January 28th, 2010. In each market, one focus group was conducted with light pulse consumers and non-consumers, and one focus group was conducted with a mix of light, moderate and heavy pulse consumers.

Types, Frequency and Form

Past six months pulse consumption is highest for beans and lowest for lentils. One-in-five Canadians report they have not consumed any pulses in the past six months.

- Overall, two-in-three (66%) Canadian adults indicate they have consumed beans – at home and/or at a restaurant – in the past six months. This drops to just over half with regard to chickpeas (53%) and peas (52%), while consumption of lentils is limited to four-in-ten (41%) Canadians. Four-in-ten (39%) Canadians' pulse consumption is limited to their home only, while 35% have consumed pulses both at home and at a restaurant, and 6% have consumed pulses at restaurants only – the remaining 20% have not consumed pulses at home or at a restaurant in

the past six months.

Among those who have consumed pulses at home in the past six months, frequency of consumption does not vary markedly by type of pulse.

- Among consumers of each type of pulse, frequency of weekly consumption is highest for chickpeas (23%) and beans (21%), and slightly lower for lentils (17%) and peas (16%). On a monthly basis, frequency of consumption of beans is highest (68%), followed by chickpeas and lentils (both 62%) and then peas (57%).

Overall, 20% of Canadians were heavy to moderate consumers, meaning they report consuming at least one type of pulse on a weekly basis at home; 60% were light consumers, meaning they report consuming at least one type of pulse at home one to three times per month or less than once a month; and 20% were non-consumers, meaning they report they have not consumed any type of pulse at home or at a restaurant during the past six months.

Pulse consumption differs significantly by a number of socio-demographic factors.

- **Light** consumers are **older** than both non-consumers and moderate to heavy consumers.
- Pulse consumption **increases** with **university education**.
- One-quarter (27%) of **non-consumers live alone** (vs. 18% of light consumers and 15% of moderate to heavy consumers), while the majority (51%) of **light consumers** live in **two-person** households, and four-in-ten (39%) **moderate to heavy** consumers have **three or more** people in their household (vs. 30% of light consumers and non-consumers).
- Perhaps reflective of a smaller household size, **non-consumers** have **lower household incomes**.
- The percentage of respondents **born and raised** in Canada **decreases** significantly as pulse **consumption increases**. Among non-consumers, 94% were born and raised in Canada – this decreases to 86% among light consumers and 74% among moderate to heavy consumers.

Canned, dried and soups are the most common forms of pulses purchased for home consumption across all pulse types. Soup is by far the most frequent dish made with peas and lentils, while dishes made with beans and chickpeas are more diverse.

- For beans, canned whole beans (76%) are the clear leader when it comes to forms purchased. Other frequently purchased forms include dried (54%) and soups (45%), followed by dips or spreads (29%). Curries, chili or stews (68%) and soups (57%) are the most common dishes made, while salads (30%), dishes with refried beans (29%), hot rice dishes (24%) and dips, spreads or salsas (23%) are mentioned by one-quarter or more bean consumers.
- Dried (65%) or soups (59%) are the predominant forms of purchase for peas, while soups (82%) are by far the most common dishes consumed. About one-quarter (26%) also make main dishes or casseroles, or curries, chili or stews with dried beans at home.
- Seven-in-ten (69%) lentil consumers purchase lentils dried, while 46% purchase them as soups and 43% canned. Similar to peas, soups (82%) are the most common dishes consumed. Curries, chili or stews (33%), main dishes such as casseroles (29%) and salads (26%) are also eaten by more than one-quarter of lentil consumers.

- The increasing popularity of hummus seems to be a major contributor to chickpea consumption. Canned chickpeas (70%) are the most common form of purchase, followed by dips or spreads (51%), and then dried (29%) and soups (24%). The most common dishes made with chickpeas are quite different than for other pulses – fully one-half (50%) of consumers make hummus or other dips, followed closely by salads (44%). As with other pulses, soups (38%) and curries, chili or stews (33%) are also relatively common dishes.

The purchase of pulses at specialty stores or ethnic groceries is quite low, while traditional grocery stores or supermarkets are the predominant choice.

- Nine-in-ten pulse (91%) consumers purchase the pulses they buy at home at a regular grocery store or supermarket, while 14% purchase them at specialty stores and just 9% purchase pulses at ethnic grocery stores.

Pulse consumption at restaurants does not vary markedly by restaurant type.

- Weekly consumption at restaurants is low, with fast food leading the way at 7% followed by ethnic and non-ethnic restaurants at 4%. Monthly pulse consumption at restaurants stands at 27% for both fast food and ethnic restaurants, and is slightly lower (23%) at non-ethnic restaurants.
- A variety of types of dishes made with pulses are consumed at restaurants with soup (64%) leading the way, followed by appetizers (52%), salads (45%) and main courses (43%). Consumption of bread products (13%) and desserts (4%) made with pulses is limited.

The estimated average weekly cooked pulse consumption among Canadians who report having consumed pulses in the past six months is 1.3 cups and the median is 0.9. This drops to an average of 1.0 cups and a median of 0.6 cups when all Canadians are taken into account.

- The median provides the better estimation of pulse consumption among Canadians given the wide variation in reported consumption.
- A number of estimations and assumptions were used in order to approximate average weekly cooked pulse consumption. This is by no means an accurate measure and was calculated in order to provide a rough estimate and compare pulse consumption between different segments.

There is a strong linkage between vegetarianism/ veganism and pulse consumption and a moderate linkage between chronic disease and pulse consumption. Weight and pulse consumption, however, are only weakly linked with similar consumption reported among both average weight and overweight individuals.

- As one might expect, pulse consumption is markedly higher among respondents with a vegetarian or vegan in the household. Consumption of all types of pulses is significantly higher both at home and at restaurants. Further, unlike the broader public, past six months consumption of the different types of pulses does not vary markedly.
- Consumption of beans, peas and lentils, but not chickpeas, is significantly higher among Canadians who have a household member with heart disease or high blood cholesterol, or diabetes. The relationship between these chronic conditions and pulse consumption, however, is not as strong as in the case of vegetarianism/ veganism.

Motivators and Barriers

A general dislike of pulses is the main reason given by non-consumers for not eating pulses, while, top-of-mind, light consumers provide a variety of reasons for not eating pulses more often.

- When non-consumers were asked to cite the main reasons why they do not eat pulses, a simple “I don’t like them” was by far the most frequent response (43%), while 11% specifically said “I don’t like the flavour or taste.” Not knowing how to cook pulses/ never having tried to cook them, and pulses not being part of their usual meals/ not a habit, also emerged as barriers.
- The most frequent reasons given by ‘light consumers’ for not consuming pulses more often are not liking pulses (I/ my family do not like them – 12% and I/ my family do not like the taste – 8%), convenience (16%), not knowing how to cook pulses (13%), not considering pulses as part of their diet (10%), and seeking variety in their diet (10%).

On an unaided basis, taste – that is, liking the taste – and health benefits are the top two reasons given by pulse consumers for eating pulses.

- When asked for reasons why they eat pulses, the top two responses given by Canadian pulse consumers are “tastes good/ I like them” (36%) and “healthy/ good for you” (34%). Specific health or dietary benefits such as “source of protein” (12%) and “source of fibre” (12%) are also cited, as is the use of pulses for specific recipes (“part of recipe” – 10%, “good for soups/ stews” – 8%, “good for chili/ dips” – 6%).

Canadians have generally positive attitudes towards pulses – most people like them and recognize their nutritional benefits.

- Not thinking about including pulses in meal planning or preparation (58%) and not knowing how to cook or prepare pulses (43%) are perhaps the biggest limitations to consumption, while not liking the taste of pulses (21%, plus 11% not applicable or don’t know) and family members not liking to eat pulses (32%, plus 7% don’t know) are barriers for a sizeable minority.
- It is notable that only one-third of Canadians agree that pulses are part of their traditional diet (33%) or that they are trying to choose vegetarian meals more often (32%).

When asked to trade off the importance of a number of factors, health benefits and taste emerge as the two most important factors when deciding whether or not to eat pulses.

- Being a source of protein and increasing fibre intake are also important, though relatively lower on the scale. It is notable, however, that being a less expensive protein is not a top factor, nor are digestive considerations. Choosing vegetarian foods more often and being part of a traditional diet are rated as the two least important factors when deciding whether or not to eat pulses.
- While health benefits and taste are important factors across the board, interesting differences emerge when the data are analyzed by consumption level. For non-consumers of pulses, taste is the single most important decision factor regarding the consumption of pulses, with health benefits a distant second, and convenience or ease of preparation and being a source of protein tied for third. In contrast, among light consumers, health benefits are the most important factor, while being a source of protein, taste and increasing fibre intake in the next tier of factors. For

moderate to heavy consumers, both health benefits and taste are key decision factors, with being a source of protein and increasing fibre intake also important but relatively lower on the scale.

- It is notable, that compared to the importance of protein and fibre, the low fat content of pulses is a relatively less important factor.

High fibre and being a source of protein are stronger factors than low fat content, with regard to nutritional factors contributing to the selection of a processed food product containing pulses.

- It is notable that 'low in sodium' is not a significant influence, and that very few respondents allocate points to folate. Given that gluten free is a niche market, it is not surprising it receives the lowest number of points.

Communicating a number of facts related to personal health could increase the likelihood of pulse consumption among Canadians; environmental benefits, however, would have a lesser impact.

Canadians' attitudes towards food and health indicate that the majority are concerned about maintaining their health (i.e. eating a healthy diet and weight control), and take actions to do so (i.e. look for healthy snacks, look at nutritional labels and exercise).

- Given the nutritional and health benefits of pulses, this is a positive for the pulse industry. So too is the finding that three-in-four Canadians like to try out new or different types of foods and recipes, and that about six-in-ten enjoy eating ethnic foods traditionally high in pulses.
- It is interesting that the 'made/ grown in Canada label' is a consideration in food purchases for a strong majority of Canadians, while sustainable agricultural practices are comparatively less important.

Information Sources

Canadians get information about healthy eating from a variety of sources.

- The most frequent sources selected were nutrition or food labels (56%), cookbooks (46%), friends, family or colleagues (45%), Canada's Food Guide (39%) and health professionals (38%). Grocery stores (32%) and newspapers (27%) are also selected by more than one-in-four respondents, while mentions of other traditional media are comparatively lower.

Cookbooks are the most frequently selected information source for getting information about preparing pulses.

- Cookbooks (57%) are followed by family (28%), friends or colleagues (27%) and personal experience (26%). Grocery stores (18%) and websites (15%) are only other channels selected by more than one-in-ten respondents.
- When focus group participants were asked where they got recipes in general, cookbooks and family were also frequent mentions, with family (particularly mothers) being a key source of information. Many also mentioned magazines and newspapers as sources for recipes. A few mentioned they watched food shows on television, and that they would seek out interesting recipes they saw online.
- When asked where they would go to find new recipes, family again emerged as a key 'trusted' resource. Apart from family, the Internet was the clear choice. It is notable that the use of Google, rather than specific recipe or food websites, is the predominant means of looking up recipes.

Market Segmentation

Segmentation seeks to identify homogeneous groups of consumers to effectively target via marketing – this can include product development, pricing, distribution and/or promotion. Once like-minded, or attitudinally similar, people are found these are grouped in segments and then the behavioural and demographic differences are analyzed in order to profile them and 'see' them in an everyday life context.

The pulse segmentation utilized a statistical technique called K-means. This is the most traditional technique and is useful for attitudinal segmentations where there are very distinct segments of approximately equal size. The segmentation solution was based on responses to a total of 21 attitudinal statements.

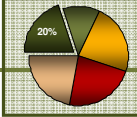
Ipsos Reid studied a number of possible segment solutions, and looked at the main drivers of the segments as well as how each solution is reflected in the other. The segment solution that presented the most 'logical' way of looking at this market was the one chosen, in this case, a five-segment solution.


Informed Champions (20%)

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.

Informed Champions

Pulses are superfoods



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

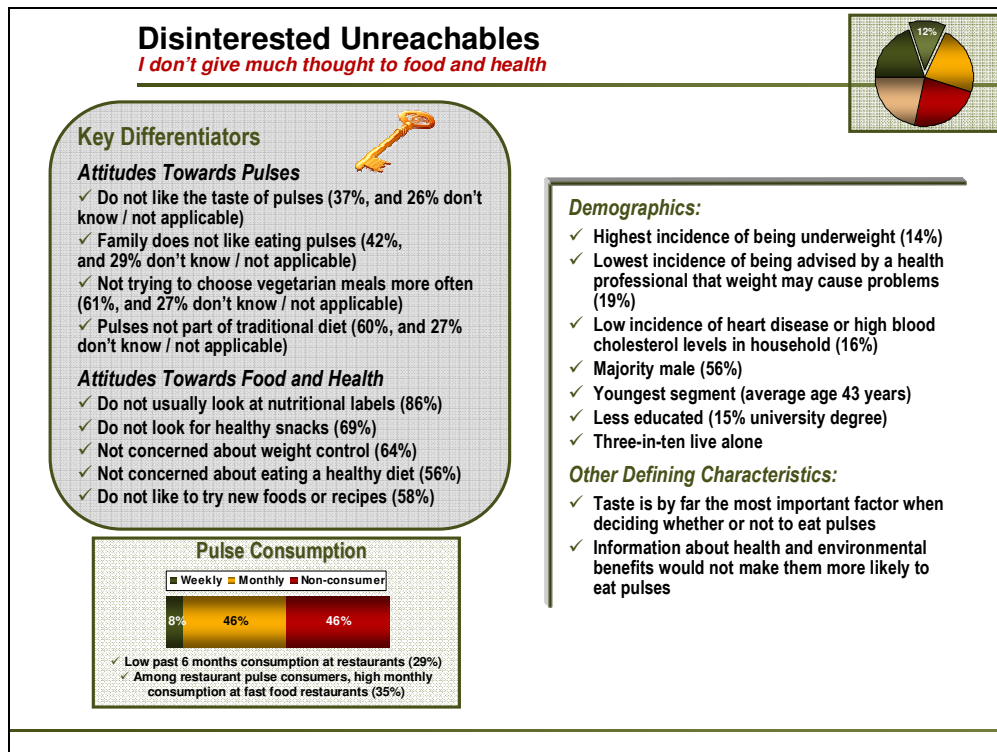
Pulse Consumption

Weekly	Monthly	Non-consumer
51%	48%	1%

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

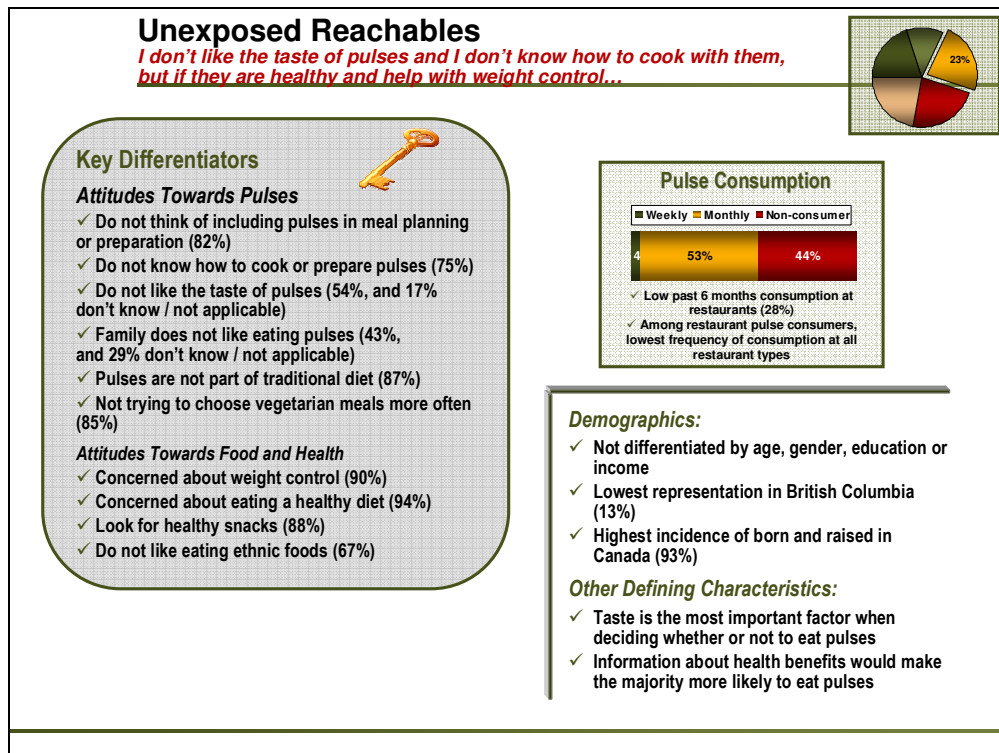
Disinterested Unreachables (12%)

Disinterested Unreachables are disengaged when it comes to food and health. They are not an attractive segment to target. As a group, very little would convince them to incorporate pulses in their diet; communicating recipe ideas, health benefits or environmental benefits are all unlikely to have an impact.



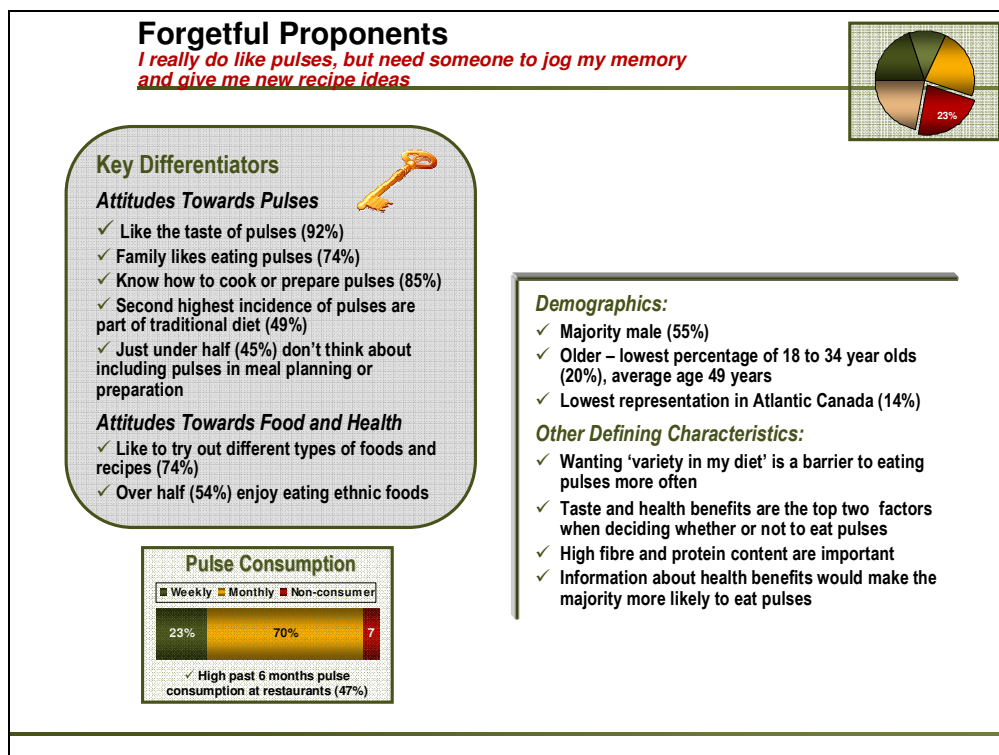
Unexposed Reachables (23%)

For Unexposed Reachables, pulses generally fall outside their consideration set. While they have not had a great deal of exposure to pulses, the health benefits of pulses resonate strongly. They should be a primary target segment as current consumption is low, but the main barrier is lack of exposure, and communicating information about the health benefits could effectively drive them to increase their pulse consumption. Teaching them how to cook a variety of ‘great tasting’ basic recipes (i.e. not ethnic or vegetarian options), and focusing on the health benefits of pulses – including weight management – should be the focus of targeted communications.



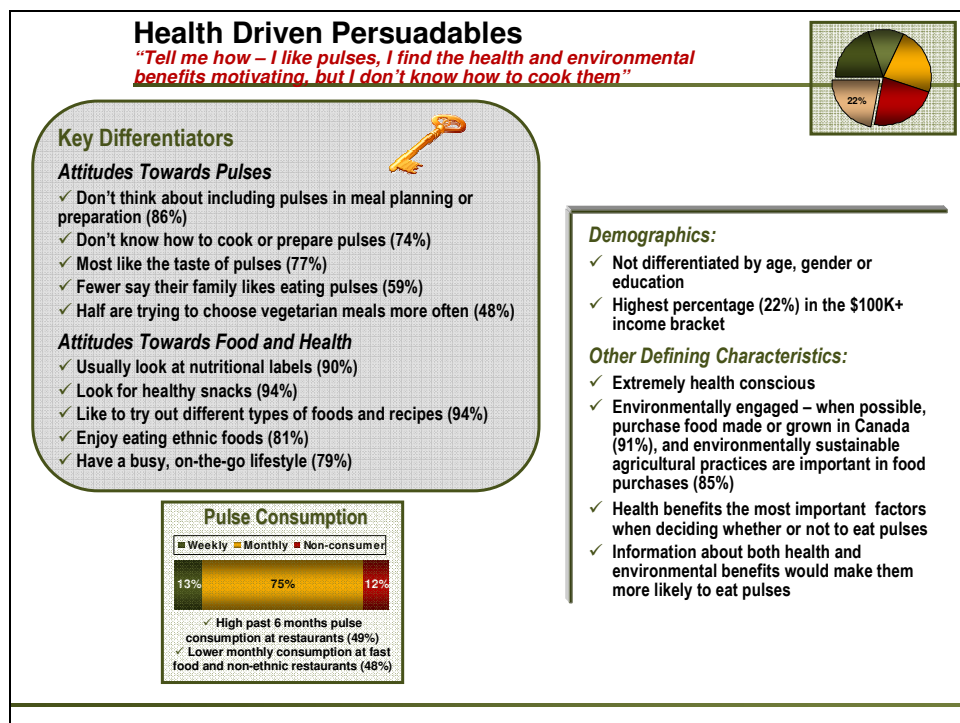
Forgetful Proponents (23%)

Forgetful proponents have the second highest pulse consumption among the segments – they enjoy pulses, but need to be reminded to include them in their diet more often. Given that 70% of Forgetful Proponents are monthly (light) pulse consumers, there is an opportunity to move them to weekly (moderate to heavy) consumption, particularly given that the vast majority like pulses. Teaching them the wide variety of ways pulses can be used, and providing new and different recipes, could increase their pulse consumption. As they like to try out different foods and recipes, as well as enjoy ethnic foods, there are no limits to the types of recipes that might appeal. Weekly emails of pulse recipes could appeal to this segment. Reminding them about the fibre and protein content of pulses, as well as other health benefits, could also serve as motivators.



Health Driven Persuadables (22%)

The taste, health benefits and environmental benefits of pulses all appeal to Health Driven Persuadables – moving from light to moderate consumption would not be a big stretch. Given that the main barriers to greater consumption of pulses are not knowing how to cook or prepare them, and not thinking about them in meal planning, persuading consumers in this segment to increase their pulse consumption seems quite feasible. Particularly since they like trying new and different foods and recipes, they like ethnic foods, and many are trying to choose vegetarian meals more often. To offset their busy lifestyle, quick recipes or ‘5-ingredient’ recipes might be particularly appealing. Teaching them how to cook pulses and providing a variety of recipes, along with communicating the health benefits of pulses, should be the primary focus when targeting this segment – with some mention of environmental benefits.



Segmentation Summary

Segment Name & Size	Informed Champions (20%)	Disinterested Unreachables (12%)	Unexposed Reachables (23%)	Forgetful Proponents (23%)	Health Driven Persuadables (22%)
Motto	"Pulses are superfoods"	"I don't give much thought to food and health"	"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 really like pulses, but need someone to jog my memory and give me new recipe ideas"	"Tell me how! I like pulses, I find the health and enviro benefits motivating, but I don't know how to cook them"
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%) • Fewer say their family likes eating pulses (59%) • Half are trying to choose vegetarian meals more often (48%)

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 overweight (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

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

Messaging and Communications

Key takeaways for communicating with the public are:

1) People don't know what pulses are. Most people are not familiar with the term 'pulses' – it needs to be spelled out explicitly in any advertising or communications. Pictures of pulse dishes are not enough – people do not know enough to identify the 'pulse' among other ingredients. For example, in picture of a salad including beans, tomatoes, corn and cilantro, many Canadians would not be able to identify beans as the pulse. Perhaps the most effective tagline is simply 'beans, peas, lentils, chickpeas' in large enough font to be clearly seen.

Pulses

beans peas lentils chickpeas

2) Colourful, delicious looking dishes are a must. Visually appealing pictures are key in any communications or messaging targeting the public – they will make people stop and take notice.

3) Recipes, recipes, recipes! Variety is a well kept secret. Even pulse consumers aren't aware of the tremendous variety of dishes that can be made with pulses, and they different varieties of pulses themselves. Quick & easy recipes, ethnic recipes, child-friendly recipes and gourmet meals all have their appeal. Further, most pulse consumers tend to use pulses in side dishes (e.g. soup, salad, dips) rather than as a main part of their meals – elevate pulses from their side dish status.

Pulse Canada already has a database of visually appealing dishes and a wide array of recipes – these are an excellent example of the types of recipes to share more widely with the public.

- 4) The internet is key.** A website address where consumers can find recipes should be a critical component for any advertising or communications. **The Internet should be an essential part of any communications strategy.**
- 5) High level nutritional and health benefits resonate the most strongly with consumers.** For example, live healthy, be heart healthy, packed with protein, high in fibre or low in saturated fat. People are skeptical of specific health benefits and research claims.
- 6) The environment should be a secondary focus.** While the environment is important to many, it should be a secondary message – preserving and protecting the environment is unlikely to drive people to increase their pulse consumption.
- 7) The ‘grown in Canada’ or ‘locally grown’ message, however, is meaningful.** This message does resonate with many and could influence purchase and consumption decisions.
- 8) Weight management is important to Canadians, but...** Information around pulse consumption and weight management definitely resonates with many consumers, however, it should not be the major focus of advertising or the key reason given for consuming pulses.
- 9) Communicating at the point of purchase could be effective.** In addition to the Internet and traditional media such as newspapers and magazines, distributing information alongside food displays (or tastings) could be a fruitful channel.

Pulse Consumption among South Asian Immigrants

Background

Conducting research with South Asians who had immigrated to Canada within the past 20 years was an important objective.

Traditionally, pulse consumption is highest among South Asian, West Asian/ Arab and Latin American populations. According to 2006 Statistics Canada data, there are 1,262,865 South Asians, 304,245 Latin Americans, 265,550 Arabs and 141,890 West Asians in Canada. This includes both immigrants and those born and raised in Canada. Further, among immigrants to Canada between 2001 and 2006, more came from South Asia (20%) than from any other region in the world¹.

Assessing changes in pulse consumption over time (e.g. recent versus longer term immigrants) and the potential for marketing pulses and pulse products to this group were key areas of interest.

¹ <http://www12.statcan.ca/census-recensement/2006/dp-pd/tbt/index-eng.cfm>

Key Findings

Past six months pulse consumption among South Asian immigrants is extremely high, and significantly higher than the broader Canadian public.

Among those who have consumed pulses at home in the past six months, weekly consumption of all four pulses is high, with lentils in the lead and peas the least frequently consumed.

- Frequency of consumption is much higher than among the Canadian public, with about three-quarters of South Asian immigrants classified as moderate to heavy consumers, one-in-five classified as light consumers and just 1% falling into the non-consumer category. **It is notable that the percentage of South Asian immigrants that fall into each of these categories does not vary significantly with tenure in Canada.**

Unlike the broader public, South Asian immigrants primarily purchase pulses in the dried form.

- Canned beans and chickpeas are also purchased by more than half, while chickpea flour is also common among South Asian immigrants. Compared to the Canadian public, South Asian immigrants tend to prepare a wider variety of dishes made with pulses.
- It is interesting that the purchase of canned beans is significantly higher among those with 11 to 20 years tenure in Canada (74% vs. 54% 10 years or less) as is the purchase of lentil soup. The purchase and consumption of dips or spreads also tends to increase with tenure, with consumption significantly lower among past 5 years immigrants.
- The findings that pulse consumption does not decrease with tenure, and that purchase and consumption of non-traditional forms and dishes increases with tenure, suggests that South Asian immigrants could be an attractive market for prepared pulse products.

While the purchase of pulses at ethnic grocery stores is strikingly higher among South Asian immigrants than the Canadian public, the purchase of pulses at regular grocery stores also remains high.

The frequency of pulse consumption is highest at ethnic restaurants and lowest at non-ethnic restaurants.

- Monthly consumption at both ethnic restaurants and fast food restaurants is significantly higher among South Asian immigrants than the broader public.

The estimated average weekly cooked pulse consumption among South Asian immigrants is 2.5 cups while the median is 2.0 cups, significantly higher than among Canadian adults (average of 1.0 cups, median of 0.6 cups).

- Again, the median provides the better estimation of pulse consumption given the wide variation in reported consumption.

South Asian immigrants have positive attitudes regarding pulses – unlike the Canadian public, not knowing how to cook pulses and not liking the taste of pulses do not emerge as barriers.

- Further, choosing vegetarian meals and pulses being part of their traditional diet are motivators not found among the general public.

Health benefits and a source of protein are the two most important factors for South Asian immigrants when deciding whether or not to eat pulses.

- Taste and increasing fibre intake are also important, though lower on the scale. Being part of their traditional diet rounds out the top five factors. While health benefits was also the most important factor for Canadians overall, taste was also a top factor, while protein and fibre fell in the next tier.

Being a source of protein and high fibre content are stronger factors than low fat content with regard to nutritional factors contributing to the selection of a processed food product containing pulses. Findings are very similar to those for Canadian adults.

As with the broader Canadian public, a number of facts related to personal health could be motivators for eating pulses, while environmental benefits have a lesser impact.

- The percentage of ‘more likely’ responses is significantly higher among South Asian immigrants for pulses are very high in fibre, pulses are free of fats and saturated fats, pulses help reduce the risks of diabetes, pulses have a low Glycemic Index and pulses are gluten free. This may in part be reflective of the finding that the incidence of diabetes in the household is significantly higher among South Asian immigrants (24% vs. 16% Canadian adults).

Again, as with the broader Canadian public, South Asian immigrants’ attitudes towards food and health indicate that the majority are concerned about maintaining their health and take actions to do so.

South Asian immigrants get information about healthy eating from a variety of sources with friends, family or colleague and nutrition or food labels leading the way.

- Canada’s Food Guide, newspapers, health professionals, cookbooks, and grocery stores are also common sources.
- Looking to friends, family and colleagues, newspapers, the library, social networking sites and pulse growers and pulse companies is significantly higher among South Asian immigrants than the broader Canadian public, whereas looking to cookbooks is significantly lower.

Family is by far the most common source for information about preparing pulses, followed by friends or colleagues, cookbooks and personal knowledge or experience.

- Reliance on family, friends or colleagues and personal knowledge or experience is strikingly higher among South Asian immigrants than the broader Canadian public. The percentage selecting newspapers and social networking sites is also higher, while the percentage selecting cookbooks is significantly lower (though still close to half).