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Ipsos Reid

Ag-West Bio

Healthy Foods & Ingredients: Surveying the Canadian Consumer

Ag-West Bio

food centre Saskatchewan Food Industry Development Centre Inc.

Agriculture Council of Saskatchewan Inc.

Agriculture and Agri-Food Canada
Agriculture et Agroalimentaire Canada

Manitoba Harvest hemp foods

Saskatoon Regional Economic Development Authority

vineland Research & Innovation Centre

STEP Saskatchewan Trade & Export Partnership

University of Saskatchewan College of Pharmacy & Nutrition

SaskCanola

Healthy Foods & Ingredients: Surveying the Canadian Consumer

- Ag-West Bio is Saskatchewan's bioscience industry association. A not-for-profit, membership-based company, Ag-West Bio has helped to move research to market, growing biobusiness in the province since 1989. Members represent biotechnology, bioproducts and biofuels, environment, and health and nutrition sectors.
  - This survey strives to bring light to the actual needs and wants of Canadian consumers. This information is essential for small and medium sized companies to properly assess market opportunities and target new product development, but has not been readily available.
- With the support of various government and industry organizations, Ag-West Bio commissioned the following survey project to:
  - Increase understanding of the Canadian consumers perceptions of healthy food and ingredients, and natural health products;
  - Provide consumer information directly to small and medium sized health and wellness companies in Canada;
  - Stimulate interest in the development and commercialization of healthier foods, ingredients and beverages.

Overview

The Food and Health Connection:

What Do Canadians Believe?

85% of Canadians connect food with health

65% have changed diet for general health

39% have made changes for specific health concern

77% **of households have three or more concerns**

Top five:

Weight loss/management – 63%

Bone/joint health – 58%

Stress – 57%

Sleep – 56%

Heart health – 54%

This information was gathered through an Ipsos Reid survey, commissioned by Ag-West Bio with support from the following partners: Saskatchewan Food Industry Development Centre, Agriculture Council of Saskatchewan, Agriculture and Agri-Food Canada, Manitoba Harvest Hemp Foods, Saskatoon Regional Economic Development Authority, Vineland Research and Innovation Centre, Saskatchewan Trade and Export Partnership, University of Saskatchewan College of Pharmacy and Nutrition, Saskatchewan Canola Development Commission

For more information: 306.975.1939 www.agwest.sk.ca/events/175

The Shopping Experience:

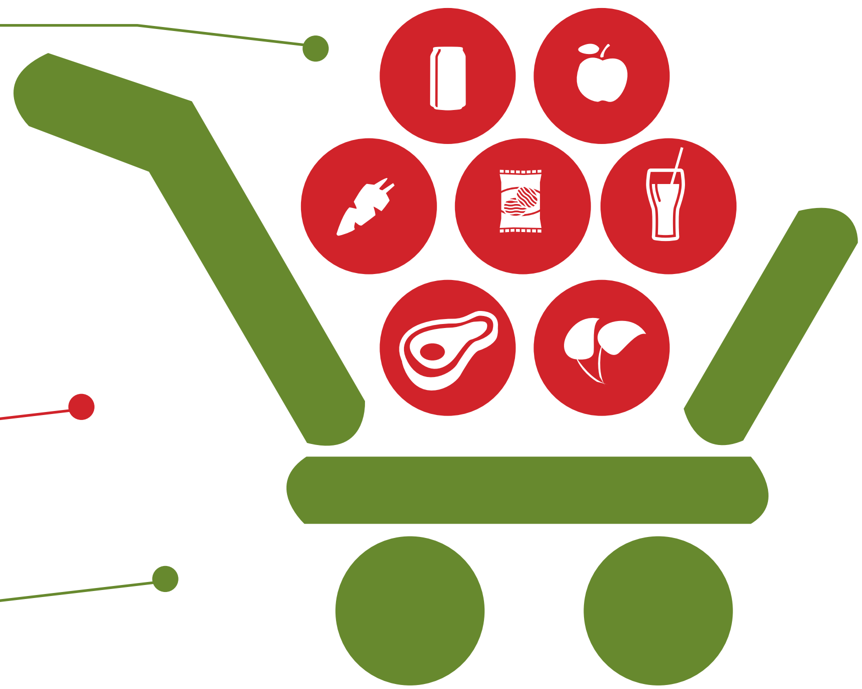
What Are Canadians Looking For?

72% **Locally made/grown**
Ethical/sustainable – 46%
Seal of approval – 46%
Non-GMO – 42%
Certified organic – 34%

56% are concerned about the safety of foods and beverage

Information sources:
Internet search – 47%
Friends or family – 43%
Health professionals – 35%

18% use a smart phone for product information



65% **say they are confident in the Canadian food supply**

Who does the shopping?

58% of women (42% men) do all or most of the grocery shopping

53% Plan meals arounds store specials

29% Buy organic when available

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For more information: 306.975.1939 www.agwest.sk.ca/events/175

Canadians and Food:

What's Hot and What's Not

Consumers looking for:
Whole grains, berries, honey, lentils, chickpeas, beans, ancient grains, flax, fish oil, hemp

93% Read nutrition facts panel

90% Read ingredient list

HOT

Consumers want:

Fibre – 82%
Vitamins & Minerals – 77%
Antioxidants – 64%
Probiotics – 64%
Omega 3 – 62%

59% seek out foods with few or simple ingredients

Most important factors:

Taste – 98%
Freshness – 98%
Price – 96%
Convenience – 85%

NOT

Top five ingredients avoided:

Sugar – 59%
Sodium – 56%
Fats – 51%
Artificial sweeteners – 46%
Preservatives – 40%

This information was gathered through an Ipsos Reid survey, commissioned by Ag-West Bio with support from the following partners: Saskatchewan Food Industry Development Centre, Agriculture Council of Saskatchewan, Agriculture and Agri-Food Canada, Manitoba Harvest Hemp Foods, Saskatoon Regional Economic Development Authority, Vineland Research and Innovation Centre, Saskatchewan Trade and Export Partnership, University of Saskatchewan College of Pharmacy and Nutrition, Saskatchewan Canola Development Commission

For more information: 306.975.1939 www.agwest.sk.ca/events/175

Looking for Health in Nature:

Natural Health Products

61% of Canadians
say they use NHPs

Daily users – 22%
Weekly users –14%
Monthly users – 8%
Seasonal users – 16%

Why NHPs?

70% General good health
Boost immunity – 44%
Digestive health – 30%
Bone health – 30%
Energy/Mental focus – 24%
Heart health – 24%
Joint health – 24%

Top five NHPs used:

70% Vitamins/Minerals
44% Calcium

Omega 3 – 38%
Probiotics – 35%
Cold medicine – 29%

This information was gathered through an Ipsos Reid survey, commissioned by Ag-West Bio with support from the following partners: Saskatchewan Food Industry Development Centre, Agriculture Council of Saskatchewan, Agriculture and Agri-Food Canada, Manitoba Harvest Hemp Foods, Saskatoon Regional Economic Development Authority, Vineland Research and Innovation Centre, Saskatchewan Trade and Export Partnership, University of Saskatchewan College of Pharmacy and Nutrition, Saskatchewan Canola Development Commission

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GMO Perceptions

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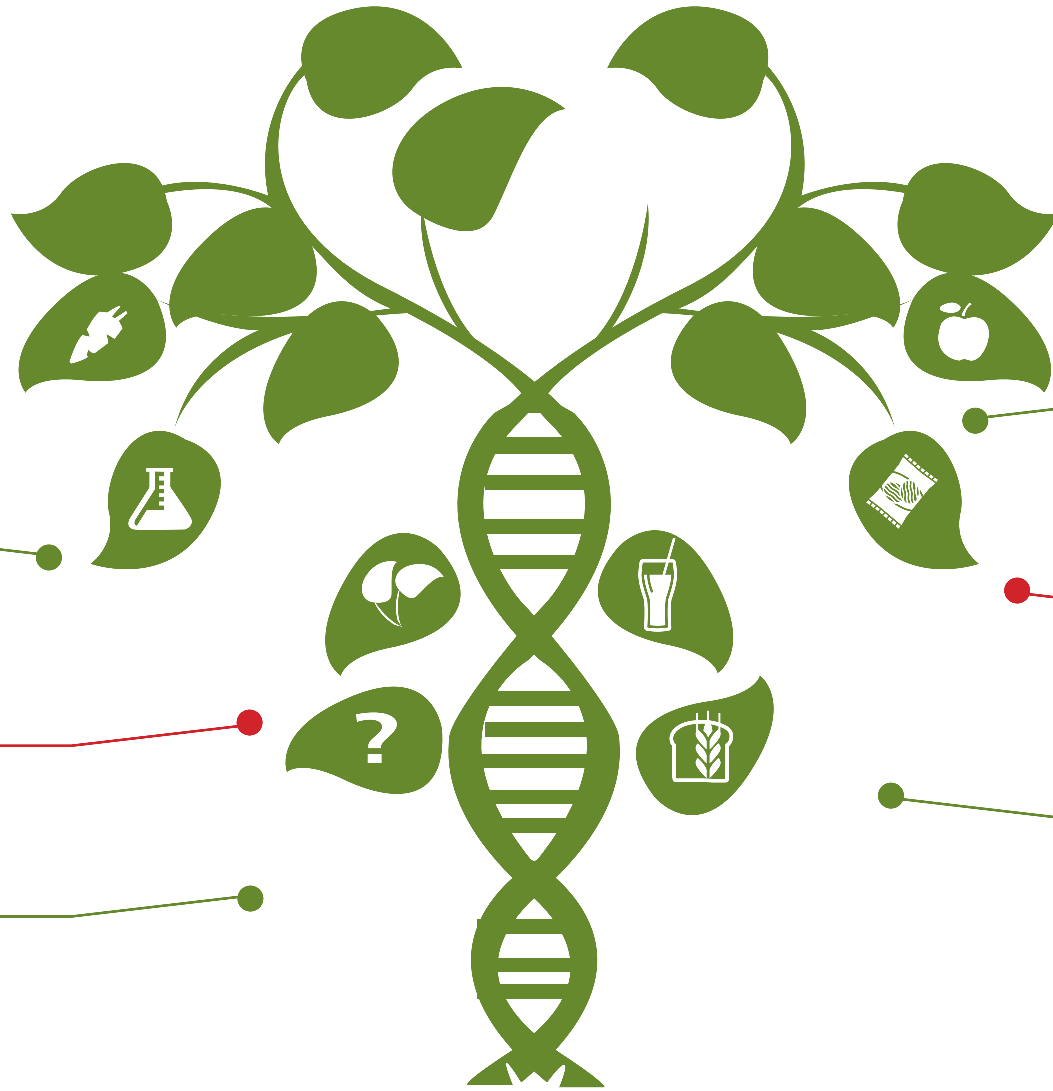


42% say non-GMO label influences purchase decision

Young adults are more likely to believe organic and non-GMO foods are healthier

60% learn about GMOs through conversation or the media

5% actively research GMO's

33% believe non-GMO foods are more nutritious

30% believe foods containing GMOs can be part of a healthy diet

35% believe certified organic foods are healthier

This information was gathered through an Ipsos Reid survey, commissioned by Ag-West Bio with support from the following partners: Saskatchewan Food Industry Development Centre, Agriculture Council of Saskatchewan, Agriculture and Agri-Food Canada, Manitoba Harvest Hemp Foods, Saskatoon Regional Economic Development Authority, Vineland Research and Innovation Centre, Saskatchewan Trade and Export Partnership, University of Saskatchewan College of Pharmacy and Nutrition, Saskatchewan Canola Development Commission

For more information: 306.975.1939 www.agwest.sk.ca/events/175

Overview

An online survey of 2,201 Canadians was conducted to measure Canadian's perceptions of health and wellness with respect to healthy foods, healthy ingredients and natural health products.

This survey was conducted using an online panel and serves as a benchmark going forward.

The following are key findings from this research:

- Most Canadians believe the food and beverages they consume impact their health and two-thirds have made a change to their diet for general health and well-being purposes.
- The most common health concern is weight loss or weight management. This is followed by bone/joint health, stress, sleep, heart health and digestive/gastrointestinal health.
- Canadians vary in their consumption of foods with healthy ingredients added. The products that are consumed at least a few times a month include:
  - Cereal with whole grains, fibre or omega-3
  - Yogurt with probiotics
  - Healthy snack foods
  - Juices fortified with calcium or added antioxidants
- Added food ingredients influence Canadians' purchase decision. The ingredients with the greatest influence on purchasing are fibre (81%) and vitamins minerals (77%).
- In addition to foods with added healthy ingredients, Canadians are using specific ingredients like whole grains, berries, honey , lentils, chickpeas and beans, and canola oil for added health benefits.
  - At least half of Canadians have purchased chick peas, lentils or dry beans. Quinoa is close with 48% of Canadians having purchased it at least once.
  - Whole grains, berries and honey are regularly used for their added health benefit.

Overview

- Among Canadians who use natural health products, vitamins/minerals followed by calcium, omega 3/essential fatty acids and probiotics are the products most commonly used. They are primarily used for general health and in order to boost the immune system.
- As age increases so does the usage of vitamins/minerals, calcium, omega 3/essential fatty acids, antioxidants and glucosamine.
- Canadians also identified items they avoid. Sugar, sodium and fats are the most common items people will try to limit in their diets. A large number of Canadians also limit artificial sweeteners (46%), preservatives (40%) and calories (39%).
- Canadians do not make shopping for healthy foods a destination purchase. They rely on their grocery store for most of their health food shopping (85%). Mass retailers like Walmart or Costco follow at 48% of Canadians purchasing their healthy foods and beverages from these retailers.
- When shopping for healthy ingredients, there are many factors that determine what people will actually purchase. Taste, freshness and price have an impact on almost everyone. These are followed by nutritional facts, the ingredient list and convenience.
- The product claims that have the most influence on Canadians are made/grown in Canada and locally made/grown while claims of certified organic and non-GMO currently have less influence on purchase decisions.
  - About a third of Canadians feel certified organic foods are healthier and a third think non-GMO foods are more nutritious than foods containing GMOs.
  - Information on GMOs is largely found by chance through conversation or the media. About a third will occasionally seek out information.
- Food safety is a concern for just over half of Canadians, but the majority (two-thirds) are confident in the safety of their food supply.
- Canadians get their information on healthy eating from a number of sources. The sources used most are online/internet (47%), from friends or family (43%) and from health professionals (35%).

Background & Methodology

Background & Objectives

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

Methodology

- The research was conducted via an online survey.
- Working with Ag-West Bio, 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=296	N=234	N=142	N=844	N=528	N=157	2,201

- Results deemed notably 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 higher within that sample group compared to the group indicated by the letter.

Perceptions of Food & Dietary Health

Perceptions of Food & Dietary Health

Most Canadians think about their health and how it is impacted by what they eat. Many are making changes to their diets to stay healthy and are looking for food with simple ingredients. Some Canadians are making dietary changes due to a specific health concern.

- Those surveyed in British Columbia and Ontario remain much more concerned than those in Quebec that the foods they consume affect their health
- Far fewer people in Quebec made changes to their diet for any reason compared to Canadians in general
- Not surprisingly, more Canadians 55 and older made changes to their diet than other age groups – both for general well-being, and for specific health concerns
- Most who made a change due to a specific health concern did so for a personal concern, rather than for the health concern(s) of someone else in their household

Perceptions of Food & Dietary Health– Region

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

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

Base: All respondents (n=2,201)

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

Perceptions of Food & Dietary Health – Age

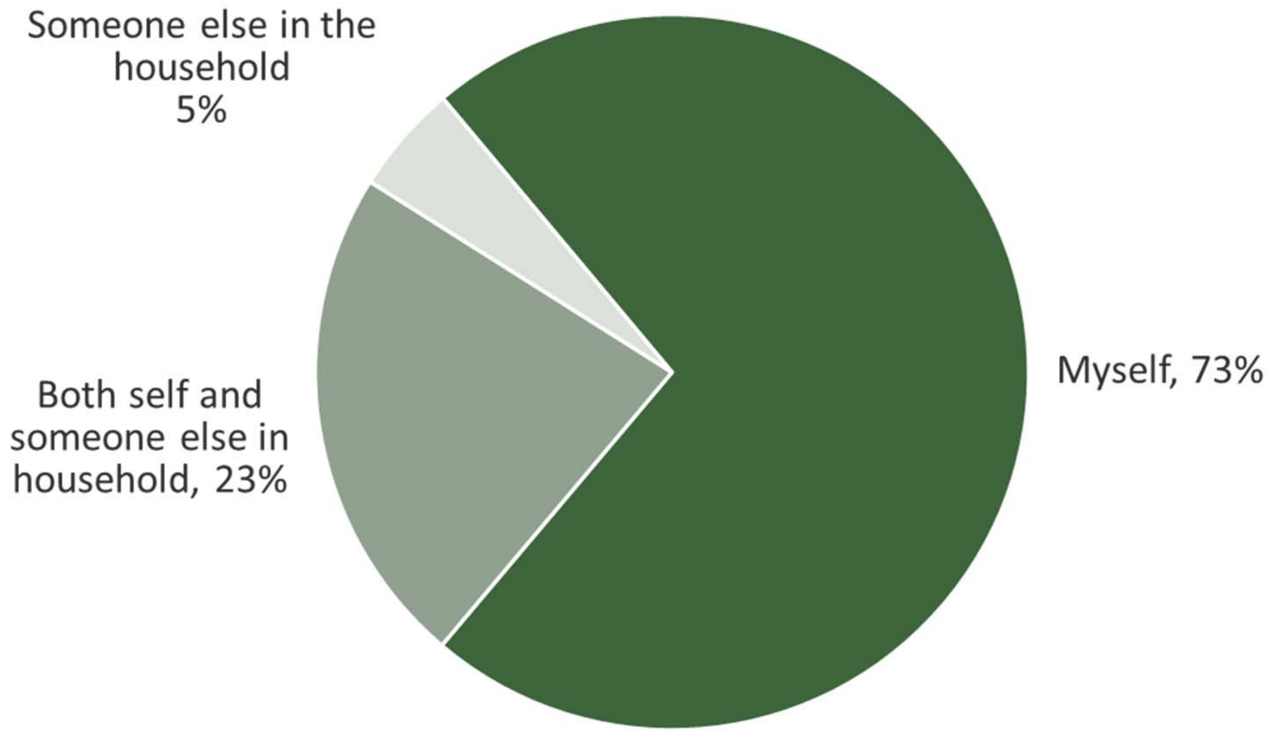
	% Agree, Rated 4 or 5				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
I believe the foods and beverages I consume affect my health	85%	85%	83%	86%	85%
I have made changes to my diet for general overall health and well-being	65%	62%	60%	63%	69% HIJ
I seek out foods with fewer, simpler ingredients	59%	57%	59%	60%	60%
I have made changes to my diet because of a specific health concern	39%	30%	33%	40% H	47% HIJ

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

Base: All respondents (n=2,201)

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

Change in Diet due to Health Concern



Base: Respondents who made a change to their diet due to a health concern (n=850)

QA2. In the last question you indicated you have made changes to your diet because of a specific health concern. Was the health concern related to you or someone else in your household?

Perceptions of Food Safety

Perceptions of Food Safety

Food safety is a concern for many Canadians. Most are confident in the Canadian food supply, but other ideas about health and safety still exist.

- Canadians in Ontario, Quebec, and Atlantic provinces are more concerned about the safety of the foods they consume than those in Saskatchewan/Manitoba.
- People in Quebec are more cost-sensitive, planning their meals around what is on special at the store
- Young adults believe that both organic and non-GMO foods are healthier than their alternatives
- Most Canadians learn about GMOs casually, rather than actively seeking out information

Perceptions of Food and Food Safety – Region

	% Agree Strongly/Somewhat Agree						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
I am confident in the safety of the Canadian food supply	65%	65%	66%	71%	66%	63%	62%
I am concerned about the safety of the foods and beverages I consume	56%	55%	50%	45%	56% D	59% CD	61% D
I plan my meals around what's on special at the grocery store	53%	47%	45%	50%	53% C	62% BCDE	55%
Certified organic foods are healthier than foods that are not organic	35%	31%	33%	27%	38% BD	35%	30%
Non-GMO foods are more nutritious than foods containing GMO	33%	34%	32%	31%	36% F	29%	31%
Foods containing GMOs can be part of a healthy diet	30%	35% F	31%	38% F	31% F	25%	29%
I buy organic foods when they are available	29%	28%	31%	24%	32% F	25%	30%

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

Base: All respondents (n=2,201)

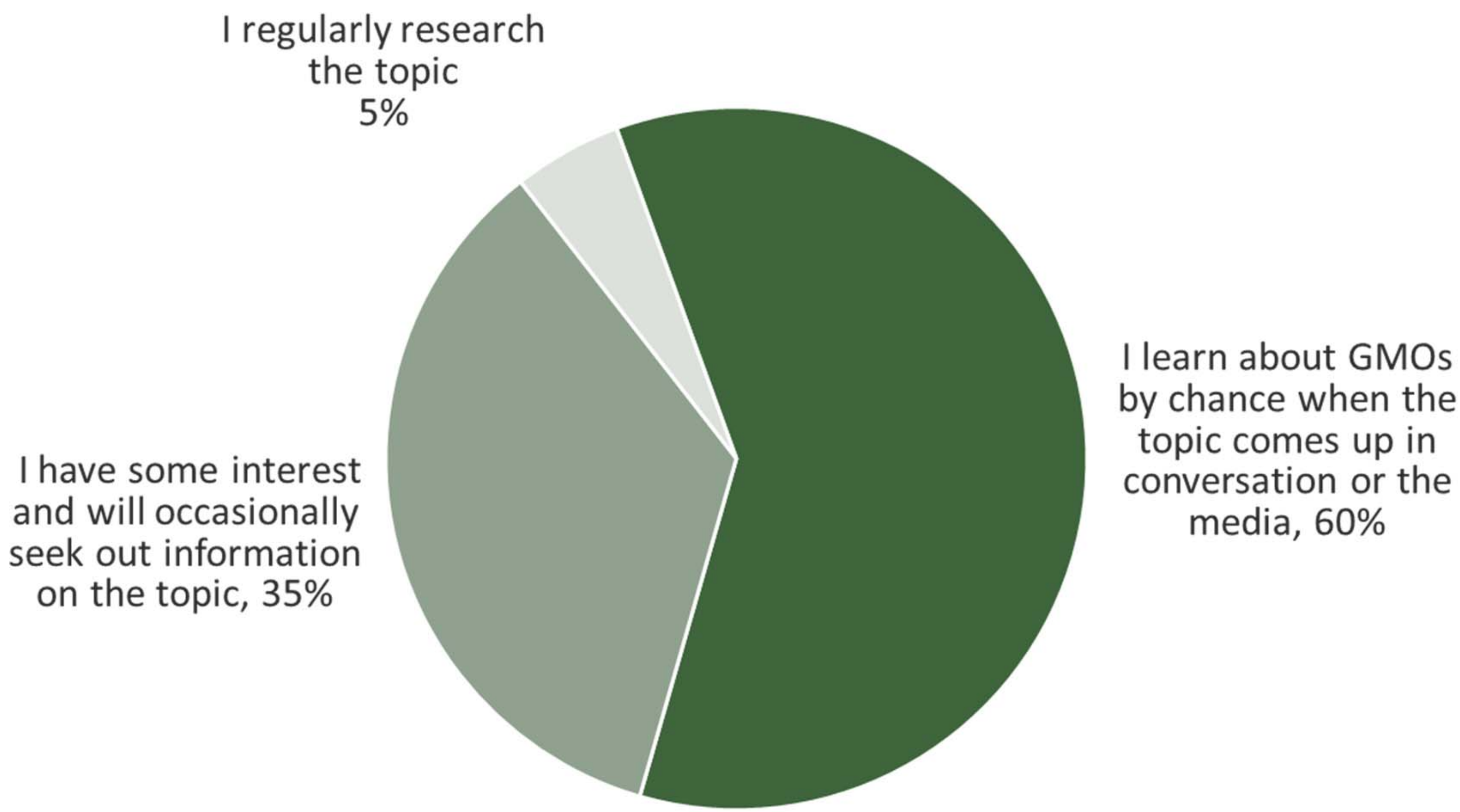
QA3. Please indicate your agreement or disagreement with the following statements…

Perceptions of Food and Food Safety – Age

	% Agree Strongly/Somewhat Agree				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
I am confident in the safety of the Canadian food supply	65%	63% I	56%	70% HI	68% I
I am concerned about the safety of the foods and beverages I consume	56%	53%	52%	58%	58%
I plan my meals around what's on special at the grocery store	53%	59% JK	55%	51%	50%
Certified organic foods are healthier than foods that are not organic	35%	38% JK	39% JK	31%	32%
Non-GMO foods are more nutritious than foods containing GMO	33%	37% JK	37% JK	30%	29%
Foods containing GMOs can be part of a healthy diet	30%	37% IJK	26%	29%	28%
I buy organic foods when they are available	29%	33% JK	30%	27%	26%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QA3. Please indicate your agreement or disagreement with the following statements…

Information on GMOs



Base: All respondents (n=2,201)

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

Current Household Health Concerns

Current Household Health Concerns

Many Canadians are concerned about various health issues, either on their own behalf or for someone in their household.

- Weight loss/management is the most common concern for Canadians
- Weight loss/management is followed by bone/joint health, stress and sleep
- Concerns about stress peak among 35 – 44 year olds
- Not surprisingly, Canadians 55 and over tend to have more health concerns.
- People in Quebec place more emphasis on sports performance and recovery compared to the rest of Canadians
- Concerns about immunity rank highest among British Columbians and Ontarians

Current Household Health Concerns – Region

	% Yes						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Weight loss/management	63%	64% F	61%	70% F	65% F	56%	65%
Bone/joint health	58%	62% DF	61% DF	49%	61% DF	52%	59%
Stress	57%	56%	60%	59%	60% F	54%	55%
Sleep	56%	59% F	63% F	57%	56% F	50%	59%
Heart health	54%	54%	49%	52%	59% CF	48%	57%
Digestive/gastrointestinal health	52%	56% D	49%	42%	53% D	49%	58% D
High blood pressure	47%	47%	50% F	49%	48% F	42%	52% F
Memory/cognitive health	44%	48% F	45% F	46% F	47% F	36%	46% F
Allergies or intolerance	43%	49% DF	46% F	36%	45% DF	33%	50% DF
Immunity	38%	45% CFG	36%	36%	42% FG	33%	32%
Diabetes	34%	35%	33%	32%	37% F	29%	35%
Sports performance or recovery	23%	20%	17%	21%	24% C	27% BCG	18%

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

Base: All respondents (n=2,201)

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=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Weight loss/management	63%	58%	67% H	63%	64% H
Bone/joint health	58%	44%	55% H	61% H	69% HIJ
Stress	57%	61% K	68% HJK	61% K	48%
Sleep	56%	57%	61% K	57%	52%
Heart health	54%	44%	55% H	56% H	60% H
Digestive/gastrointestinal health	52%	47%	56% H	53% H	53% H
High blood pressure	47%	35%	44% H	45% H	59% HIJ
Memory/cognitive health	44%	40%	49% H	45%	45%
Allergies or intolerance	43%	43%	49% K	45% K	38%
Immunity	38%	41% K	47% JK	39% K	32%
Diabetes	34%	30%	35%	36% H	35% H
Sports performance or recovery	23%	31% JK	28% K	25% K	13%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)

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

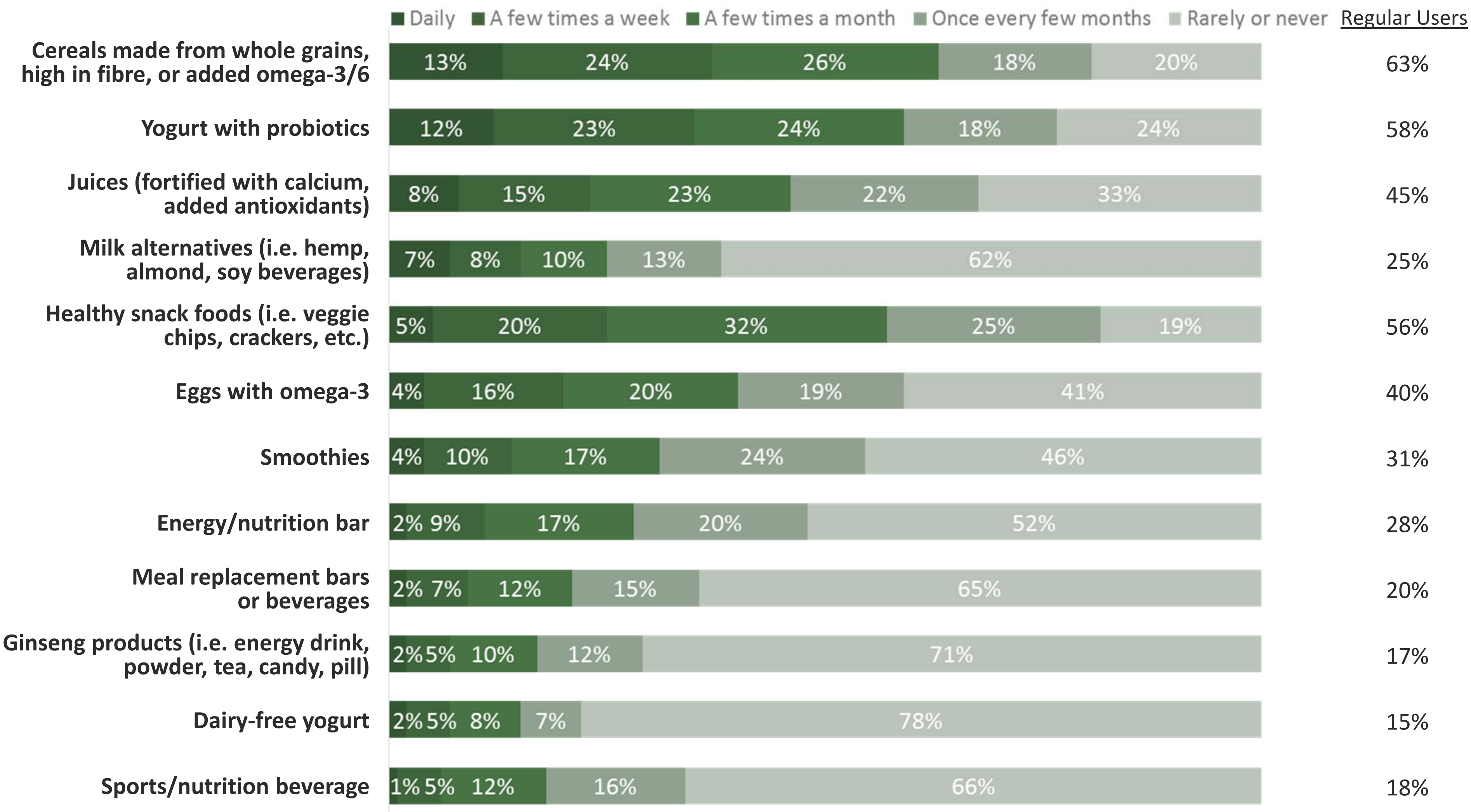
Healthy Foods and Ingredients

Healthy Foods and Ingredients

Consumption and purchase of healthy ingredients differs by age and region, especially with specialized products like hemp.

- Cereal is an important staple for Canadians, with most purchasing it at least once a month
- More than half of Canadians also regularly consume yogurt with probiotics and healthy snack foods
- Ontarians consume more juice and eggs with omega-3, while British Columbians have a larger share of yogurt with probiotics than other Canadians
- In general, people in Ontario, Quebec and British Columbia purchase healthy foods and ingredients more often than the rest of Canadians (Prairies and Atlantic)
- Younger Canadians tend to buy more healthy foods and ingredients than older Canadians
- At least half of Canadians have purchased chick peas, lentils or dry beans
- Less than one in five Canadians have ever purchased hemp seeds and approximately one in ten have ever purchased hemp protein powder
- Hemp seeds and hemp protein powder were purchased mainly for their health benefits, but also to mix with other ingredients

Healthy Foods and Ingredients – All Canadians



Base: All respondents (n=2,201)

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

Healthy Foods and Ingredients Consumption – Region

	% who consume at least monthly						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Cereals made from whole grains, high in fibre, or added omega-3/6	63%	67% F	62%	63%	64% F	56%	70% F
Yogurt with probiotics	58%	65% CEF	55%	58%	57%	57%	58%
Healthy snack foods (i.e. veggie chips, crackers, etc.)	56%	55%	49%	48%	57% C	59% CD	61% CD
Juices (fortified with calcium, added antioxidants)	45%	38%	42%	39%	50% BDG	46%	38%
Eggs with omega-3	40%	39%	30%	34%	46% BCDF	37%	42% C
Smoothies	31%	28% F	37% BF	30% F	37% BF	19%	35% F

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QC2. Which of the following best describes how often you consume each of the following products?

Healthy Foods and Ingredients Consumption – Region (cont.)

	% who consume at least monthly						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Energy/nutrition bar	28%	26%	20%	20%	30% CD	31% CD	25%
Milk alternatives (i.e. hemp, almond, soy beverages)	25%	29% G	22%	22%	27% G	25% G	17%
Meal replacement bars or beverages	20%	13%	18%	15%	23% B	21% B	20%
Sports/nutrition beverage	18%	14%	15%	18%	19%	22% BC	17%
Ginseng products (i.e. energy drink, powder, tea, candy, pill)	17%	13%	11%	13%	20% BCG	19% CG	11%
Dairy-free yogurt	15%	15%	13%	9%	16%	17% D	13%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QC2. Which of the following best describes how often you consume each of the following products?

Healthy Foods and Ingredients Consumption – Age

	% who consume at least monthly				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Cereals made from whole grains, high in fibre, or added omega-3/6	63%	57%	61%	62%	68% HIJ
Yogurt with probiotics	58%	56%	62%	60%	57%
Healthy snack foods (i.e. veggie chips, crackers, etc.)	56%	61% K	57% K	58% K	51%
Juices (fortified with calcium, added antioxidants)	45%	46% J	47% J	37%	47% J
Eggs with omega-3	40%	48% IJK	40%	36%	36%
Smoothies	31%	39% JK	39% JK	27%	23%

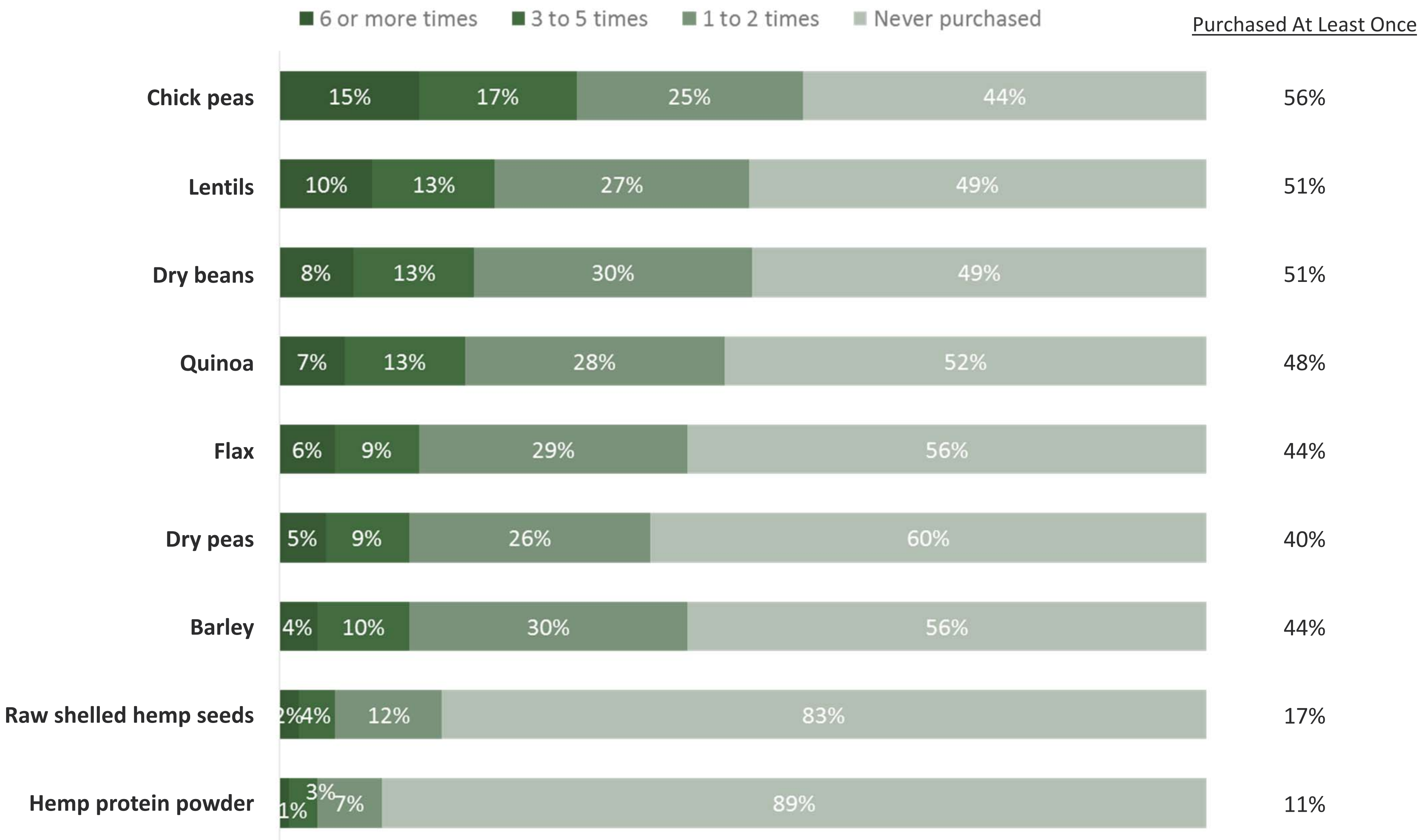
HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QC2. Which of the following best describes how often you consume each of the following products?

Healthy Foods and Ingredients Consumption – Age (cont.)

	% who consume at least monthly				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Energy/nutrition bar	28%	33% JK	29%	26%	23%
Milk alternatives (i.e. hemp, almond, soy beverages)	25%	35% JK	30% JK	23% K	17%
Meal replacement bars or beverages	20%	26% JK	22% K	16%	16%
Sports/nutrition beverage	18%	29% JK	24% JK	15% K	9%
Ginseng products (i.e. energy drink, powder, tea, candy, pill)	17%	23% JK	20% K	15%	11%
Dairy-free yogurt	15%	20% JK	17% K	15%	11%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QC2. Which of the following best describes how often you consume each of the following products?

Purchased in Past 12 Months – All Canadians



Base: All respondents (n=2,201)

QB3. Approximately how many times in the past 12 months have you bought any of the following?

Purchased in Past 12 Months – Region

	% who purchased at least once						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Chick peas	56%	57% CDG	44%	46%	62% CDG	61% CDG	39%
Lentils	51%	55% CDG	38%	35%	55% CDG	56% CDG	32%
Dry beans	51%	56% CD	44%	41%	52% CD	52% CD	51%
Quinoa	48%	52% D	47% D	34%	51% D	46% D	42%
Flax	44%	48% F	46% F	46% F	46% F	36%	52% F
Barley	44%	41%	45%	44%	41%	51% BE	42%
Dry peas	40%	48% CDEG	37%	35%	38%	45% CDEG	30%
Raw shelled hemp seeds	17%	26% DEFG	19%	13%	17%	14%	14%
Hemp protein powder	11%	12%	12%	11%	12% G	9%	6%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB3. Approximately how many times in the past 12 months have you bought any of the following?

Purchased in Past 12 Months – Age

	% who purchased at least once				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Chick peas	56%	55%	57%	53%	59%
Lentils	51%	47%	50%	49%	55% H
Dry beans	51%	46%	49%	49%	58% HIJ
Quinoa	48%	53% JK	51% J	44%	45%
Flax	44%	42%	44%	44%	46%
Barley	44%	37%	42%	43% H	51% HIJ
Dry peas	40%	32%	38% H	41% H	47% HI
Raw shelled hemp seeds	17%	20% JK	19%	15%	15%
Hemp protein powder	11%	15% JK	14% JK	8%	8%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB3. Approximately how many times in the past 12 months have you bought any of the following?

Reason for Hemp Seed Purchase – Region

	Hemp seed purchasers						
	Total (n=383)	British Columbia (n=77) (B)	Alberta (n=45) (C)	Saskatchewan /Manitoba (n=18) (D)	Ontario (n=145) (E)	Quebec (n=75) (F)	Atlantic (n=22) (G)
Health/Benefits	40%	47%	33%	**	39%	32%	**
Use with other foods	30%	37% F	38% F	**	30% F	17%	**
Appeal	13%	14%	16%	**	12%	15%	**
Taste	6%	8%	6%	**	7%	5%	**
Other	16%	17%	14%	**	17%	13%	**
Don't Know	9%	8%	8%	**	7%	16% E	**

** base too small to report.

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: Among those who have purchased raw shelled hemp seeds (n=383)
QB4a. Why did you purchase raw shelled hemp seeds?

Reason for Hemp Seed Purchase – Age

	Hemp seed purchasers				
	Total (n=383)	18 to 34 (n=125) (H)	35 to 44 (n=70) (I)	45 to 54 (n=68) (J)	55+ (n=120) (K)
Health/Benefits	40%	35%	45%	33%	47%
Use with other foods	30%	25%	22%	37%	35%
Appeal	13%	14%	17%	10%	11%
Taste	6%	6%	5%	4%	8%
Other	16%	10%	15%	22% H	20%
Don't Know	9%	16% JK	9%	4%	3%

HIJK: Significantly higher than sub-group represented by that letter.
Base: Among those who have purchased raw shelled hemp seeds (n=383)
QB4a. Why did you purchase raw shelled hemp seeds?

Reason for Hemp Protein Powder Purchase – Region

	Hemp protein powder purchasers						
	Total (n=238)	British Columbia (n=35) (B)	Alberta (n=29) (C)	Saskatchewan/Manitoba (n=15) (D)	Ontario (n=101) (E)	Quebec (n=48) (F)	Atlantic (n=9) (G)
Health/Benefits	33%	29%	**	**	34%	36%	**
Use with other foods	27%	33%	**	**	28%	18%	**
Appeal	12%	17%	**	**	10%	14%	**
Other	12%	14%	**	**	12%	11%	**
Don't Know	13%	12%	**	**	14%	14%	**

** base too small to report

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: Among those who have purchased hemp protein powder (n=238)
QB4b. Why did you purchase hemp protein powder?

Reason for Hemp Protein Powder Purchase – Age

	Hemp protein powder purchasers				
	Total (n=238)	18 to 34 (n=92) (H)	35 to 44 (n=51) (I)	45 to 54 (n=36) (J)	55+ (n=60) (K)
Health/Benefits	33%	36%	29%	28%	36%
Use with other foods	27%	16%	29%	31%	41% H
Appeal	12%	17%	8%	8%	11%
Other	12%	11%	14%	14%	12%
Don’t Know	13%	18% K	17% K	11%	3%

HIJK: Significantly higher than sub-group represented by that letter.
Base: Among those who have purchased hemp protein powder (n=238)
QB4b. Why did you purchase hemp protein powder?

Factors in the Food Purchase Decision

Factors in the Food Purchase Decision

When shopping for healthy ingredients, there are many factors that determine what people will actually purchase. In addition to the food product itself, there are also ingredients to avoid, and the knowledge necessary to use health ingredients in cooking.

- Freshness, taste, and price are consistently important across all regions and ages
- Convenience and grab and go play is more important for people in Quebec than in other parts of the country
- British Columbians pay more attention to brand name and ingredient lists than other Canadians
- People in Quebec focus mostly on limiting fats in their diet, whereas other regions place more emphasis on limiting sugar and sodium
- Older Canadians try to reduce their intake of nearly all listed unhealthy ingredients
- British Columbians are the most knowledgeable about how to use healthy ingredients in cooking

Factors in the Food Purchase Decision – Region

	% impacted, a lot/little impact						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Taste	98%	99%	98%	97%	98%	97%	99%
Freshness	98%	98%	99%	96%	98%	98%	99%
Price	96%	97%	96%	97%	96%	97%	99%
Nutritional facts	93%	94%	93%	93%	91%	92%	96% E
Ingredient list	90%	94% DEF	90%	85%	90%	89%	93% D
Convenience	85%	80%	83%	85%	85%	89% BCEG	81%
Brand name	79%	86% EFG	80% G	79%	79% G	78% G	69%
Grab and Go	59%	49%	53%	56%	59% B	68% BCDEG	52%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)

QB1. How much of an impact do the following have on your decision to buy foods and beverages?

Factors in the Food Purchase Decision – Age

	% impacted, a lot/little impact				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Taste	98%	97%	97%	98%	99% HI
Freshness	98%	97%	97%	98%	99% HI
Price	96%	97%	94%	97%	97% I
Nutritional facts	93%	92%	92%	93%	94%
Ingredient list	90%	87%	90%	90%	92% H
Convenience	85%	89% K	87% K	86% K	80%
Brand name	79%	77%	76%	81%	83% HI
Grab and Go	59%	68% JK	66% K	60% K	48%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB1. How much of an impact do the following have on your decision to buy foods and beverages?

Items to Limit – Region

	% Yes						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Sugar	60%	65%	56%	58%	62%	57%	58%
Salt/Sodium	59%	62% C	51%	58%	58%	61% C	63% C
Fats	53%	48%	50%	46%	50%	67% BCDEG	44%
Artificial Sweeteners	46%	54% CF	44%	45%	48% F	36%	53% F
Preservatives	40%	42% F	42% F	36%	43% F	33%	47% F
Calories	39%	39%	33%	38%	39%	44% C	36%
Dyes	30%	36% DF	28%	24%	30%	27%	33%
Caffeine	19%	20%	20%	20%	20%	18%	17%
Gluten	11%	11%	10%	8%	12% F	8%	15% F
None of the above	11%	10%	11%	12%	12%	9%	7%

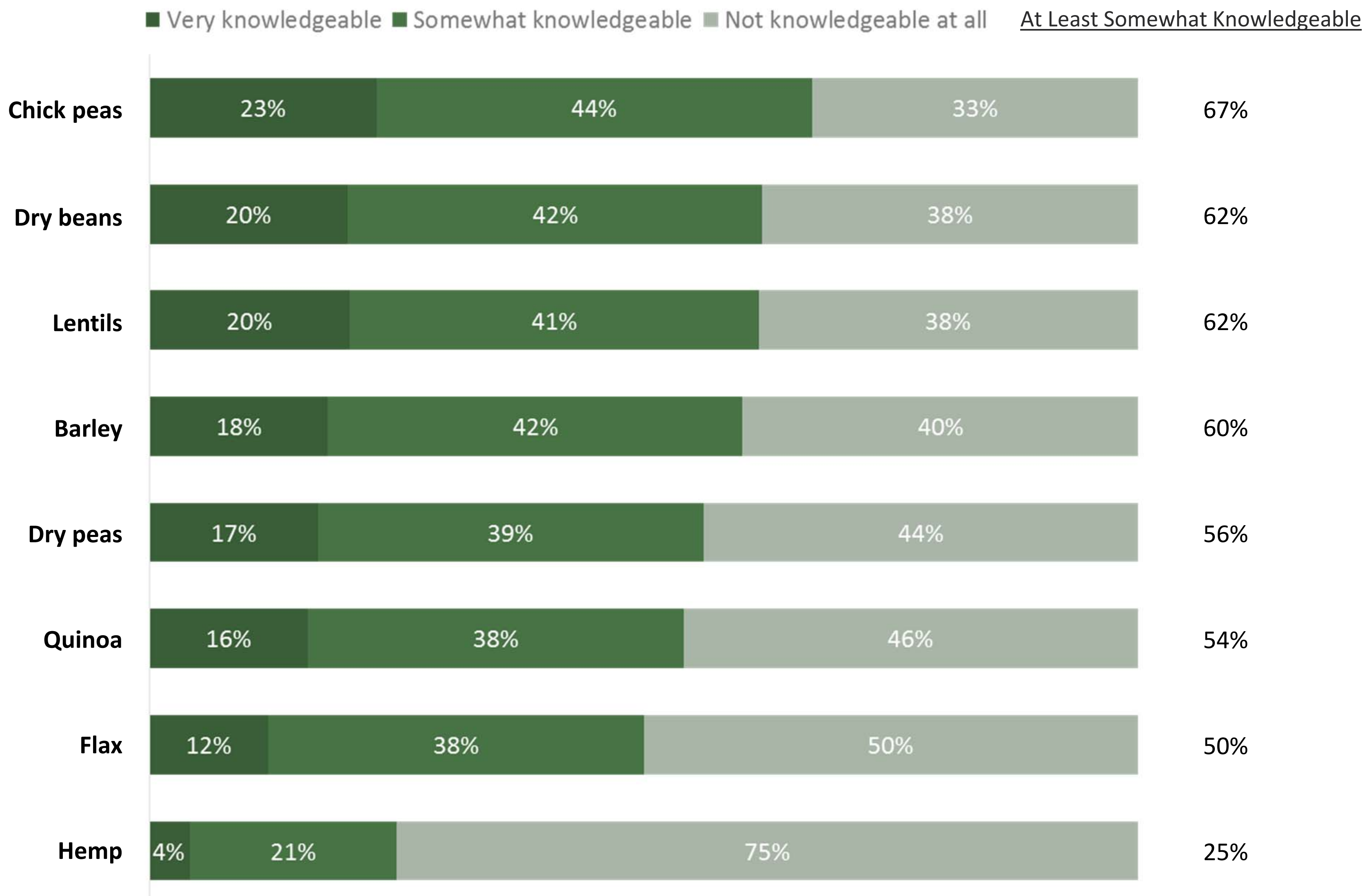
BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB2. Which of the following are you trying to limit in your diet? Select all that apply.

Items to Limit – Age

	% Yes				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Sugar	60%	54%	56%	63% HI	65% HI
Salt/Sodium	59%	51%	46%	61% HI	71% HIJ
Fats	53%	49%	43%	55% HI	60% HI
Artificial Sweeteners	46%	43%	41%	48%	49% HI
Preservatives	40%	34%	34%	42% HI	47% HI
Calories	39%	35%	36%	39%	44% HI
Dyes	30%	25%	26%	30% H	36% HI
Caffeine	19%	22% J	18%	16%	20%
Gluten	11%	9%	11%	12%	12%
None of the above	11%	14% JK	14% JK	8%	8%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB2. Which of the following are you trying to limit in your diet? Select all that apply.

Knowledgeable of Ingredient Use in Meals – All Canadians



Base: All respondents (n=2,201)

QB5. How knowledgeable do you feel cooking with or incorporating each of the following in your meals?

Knowledgeable of Ingredient Use in Meals – Region

	% very/somewhat knowledgeable						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Chick peas	67%	76% CDFG	57%	59%	70% CDG	68% CDG	56%
Lentils	62%	70% CDG	56% G	46 %	65% CDG	65% CDG	44%
Dry beans	62%	71% CDEF	59%	55 %	62%	60%	62%
Barley	60%	66% DE	65% DE	54 %	55%	60%	63%
Dry peas	56%	64% CDEG	55% G	52 %	55% G	58% G	44%
Quinoa	54%	63% CDEFG	47 %	42 %	56% CDG	54% DG	43%
Flax	50%	56% EF	51%	54 %	49%	45%	57% F
Hemp	25%	30% F	29% F	22 %	25%	21%	26%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB5. How knowledgeable do you feel cooking with or incorporating each of the following in your meals?

Knowledgeable of Ingredient Use in Meals – Age

	% very/somewhat knowledgeable				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Chick peas	67%	64%	67%	64%	71% HJ
Lentils	62%	56%	62%	62% H	66% H
Dry beans	62%	54%	60%	64% H	68% HI
Barley	60%	49%	56% H	60% H	69% HIJ
Dry peas	56%	48%	53%	58% H	62% HI
Quinoa	54%	59% JK	58% JK	49%	51%
Flax	50%	48%	56% HJ	48%	50%
Hemp	25%	30% JK	32% JK	23%	20%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB5. How knowledgeable do you feel cooking with or incorporating each of the following in your meals?

Role of Product Attributes/Claims in the Food Purchase Decision

Role of Product Attributes/Claims in the Food Purchase Decision

More general than ingredients alone, claims and aspects of food hold influence over what consumers decide to purchase.

- The largest influencing factor across all regions is locally grown/made in Canada, though this holds particular weight among older adults
- Vegetarian and plant-based foods have less impact but do play a larger role for people in British Columbia, Ontario, and Quebec
- Younger adults are more influenced by products that are dairy-free and certified organic than are older adults

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

	% more likely to purchase, a lot more/somewhat more						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Made/grown in Canada	72%	75% F	69%	69%	73% F	68%	79% F
Locally made/grown	71%	75%	68%	67%	73%	68%	78% F
Seal of approval (i.e. Heart&Stroke Health Check™program)	46%	46% D	46% D	33%	47% D	49% D	45%
Ethically or Sustainably grown/produced	46%	50% D	42%	38%	45%	50% D	45%
Non-GMO	42%	46% D	39% D	28%	43% D	44% D	42% D
Certified organic	34%	38% CDG	28%	25%	35% D	36% CD	28%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)

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

Role of Product Attributes/Claims in the Food Purchase Decision – Region (cont.)

	% more likely to purchase, a lot more/somewhat more						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Plant based	32%	37% CG	26%	28%	35% CG	32% G	21%
Allergen-free	24%	21%	19%	15%	25% D	28% CD	24%
Gluten-free	17%	16%	15%	9%	20% DF	16% D	19% D
Vegan or vegetarian	16%	17% CG	9%	12%	18% CG	20% CG	9%
Dairy-free	13%	11%	11%	10%	16%	12%	12%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB6. How do the following product attributes or claims influence your decision to buy a food product?

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

	% more likely to purchase, a lot more/somewhat more				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Made/grown in Canada	72%	60%	65%	74% HI	83% HIJ
Locally made/grown	71%	62%	64%	73% HI	82% HIJ
Seal of approval (i.e. Heart&Stroke Health Check™program)	46%	37%	38%	50% HI	55% HI
Ethically or Sustainably grown/produced	46%	44%	40%	46%	50% HI
Non-GMO	42%	41%	43%	43%	42%
Certified organic	34%	38% K	36% K	35%	29%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)

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

Role of Product Attributes/Claims in the Food Purchase Decision – Age (cont.)

	% more likely to purchase, a lot more/somewhat more				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Plant based	32%	31%	31%	32%	34%
Allergen-free	24%	23%	21%	21%	28% IJ
Gluten-free	17%	18%	17%	16%	18%
Vegan or vegetarian	16%	19% K	19%	15%	14%
Dairy-free	13%	18% JK	14%	10%	11%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB6. How do the following product attributes or claims influence your decision to buy a food product?

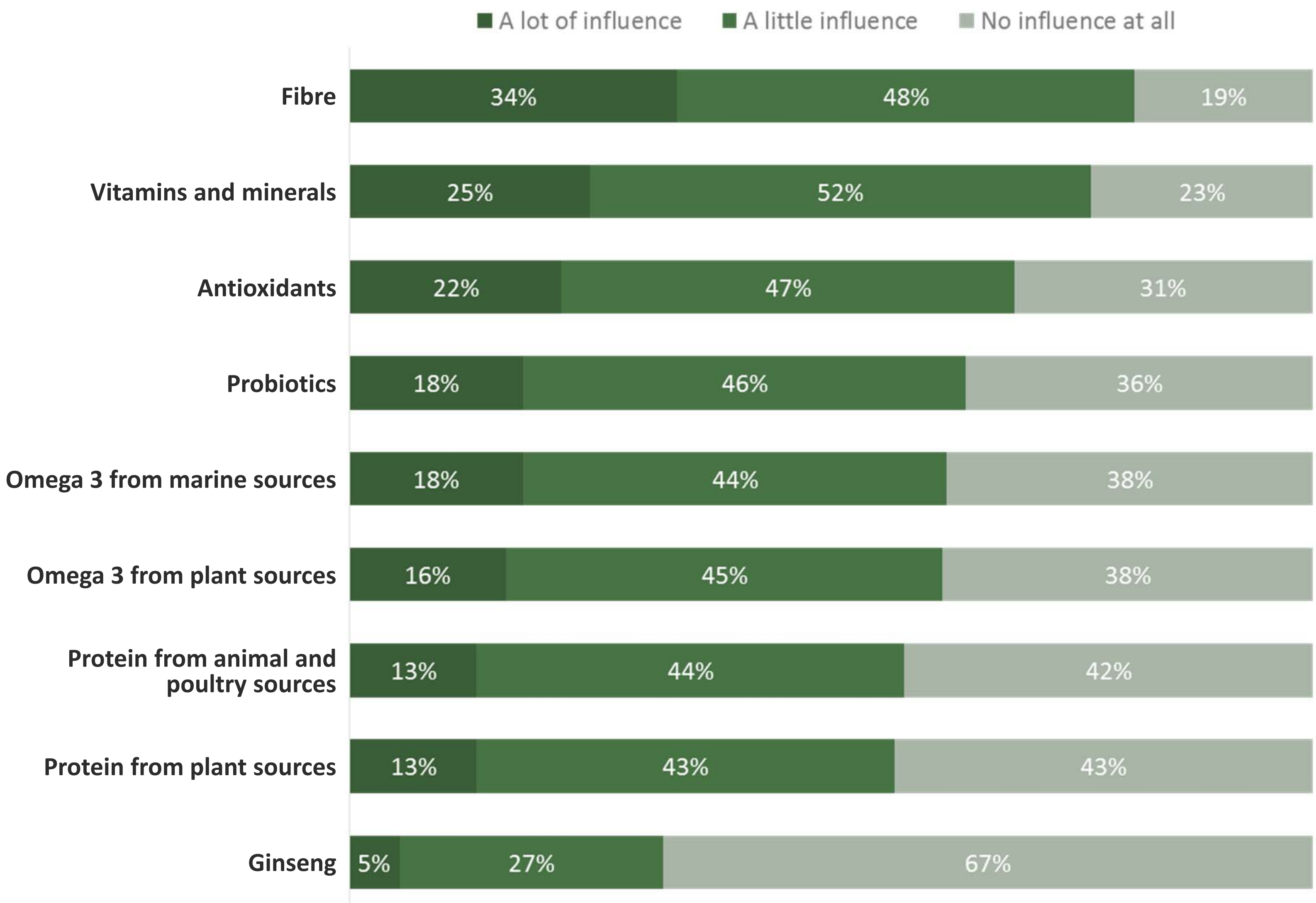
Influence of Added Ingredients on Food Purchase Decision

Influence of Added Ingredients on Food Purchase Decision

Ingredients added for health benefits often play a role in the food purchase decision.

- Fibre has the highest influence on purchase intent for Canadians across all regions and age groups, though this is especially true for adults over 44
- Vitamins and minerals are especially important to people in Quebec and Ontario
- Older adults are influenced by the presence of omega 3 from both marine and plant sources more than younger Canadians are
- Antioxidants are important for British Columbians and people in Quebec, as well as seniors

Ingredient Influence – All Canadians



Base: All respondents (n=2,201)

QC1. How much influence does each of the following added food ingredients have on your food choices?

Ingredient Influence – Region

	% influenced, a lot of influence						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Fibre	34%	39% CDE	24%	24%	31% C	39% CDE	41% CDE
Vitamins and minerals	25%	23%	19%	21%	26% CG	31% BCDG	18%
Antioxidants	22%	24% CD	16%	15%	22% C	27% CD	19%
Omega 3 from marine sources	18%	16%	13%	10%	18% D	21% CD	19% D
Probiotics	18%	21% CD	14%	10%	17% D	22% CDE	15%
Omega 3 from plant sources	16%	16%	14%	14%	16%	20% G	10%
Protein from animal and poultry sources	13%	14%	15% D	7%	14% D	11%	13%
Protein from plant sources	13%	15% G	12%	10%	13%	17% DG	7%
Ginseng	5%	7% G	3%	3%	5%	7% CG	2%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QC1. How much influence does each of the following added food ingredients have on your food choices?

Ingredient Influence – Age

	% influenced, a lot of influence				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Fibre	34%	27%	27%	34% HI	42% HIJ
Vitamins and minerals	25%	24%	23%	28%	26%
Antioxidants	22%	19%	20%	23%	25% H
Omega 3 from marine sources	18%	13%	12%	19% HI	23% HI
Probiotics	18%	15%	16%	19%	20% H
Omega 3 from plant sources	16%	15%	12%	17%	19% I
Protein from animal and poultry sources	13%	12%	13%	14%	13%
Protein from plant sources	13%	13%	12%	15%	14%
Ginseng	5%	7% K	6% K	7% K	3%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QC1. How much influence does each of the following added food ingredients have on your food choices?

Specific Foods/Ingredients Sought for Added Health Benefits

Specific Foods/Ingredients Sought for Added Health Benefits

Some ingredients are sought after for the added health benefits they provide.

- Whole grains, berries and honey are regularly used for their health benefits
- Quebecois purchase honey more regularly than any other listed food
- Lentils, chickpeas, and beans are commonly sought out by people in British Columbia, Quebec, and Ontario more so than by people on the Prairies or in the Atlantic provinces
- Whole grains and berries are used more by those 55 years or older than by younger adults

Specific Foods/Ingredients Sought for Added Health Benefits – Region

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

BCDEFG: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown.
Base: All respondents (n=2,201)

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

Specific Foods/Ingredients Sought for Added Health Benefits – Age

	% Yes				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Whole grains	52%	44%	46%	52% H	61% HIJ
Berries (Saskatoon berries, blueberries)	49%	40%	41%	51% HI	60% HIJ
Honey	48%	43%	46%	48%	54% HI
Lentils, chickpeas and beans	38%	31%	37%	38% H	45% HIJ
Canola Oil	38%	26%	29%	42% HI	49% HIJ
Ancient grains such as buckwheat, rye and quinoa	28%	24%	27%	31% H	30% H
Flax (seed, oil)	26%	23%	27%	28% H	26%
Fish oil	17%	13%	16%	18%	21% H
Hemp (seed, oil, hemp hearts, milk, protein powder)	10%	11%	10%	9%	11%
Ginseng	8%	8%	8%	9%	7%
I don't use of the above	16%	20% K	18% K	17% K	11%

HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown.
Base: All respondents (n=2,201)

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

Retail Locations for Healthy Foods and Ingredients

Retail Locations for Health Food Purchase

Most Canadians still rely on grocery stores for most of their health food shopping, with mass retailers as a distant second.

- Farmers markets are a source for healthy foods in BC, Ontario, and Atlantic provinces
- Older adults shop primarily at grocery stores, but also utilize farmers markets, drug stores, and natural food stores
- Ontarians and British Columbians shop more at natural food stores compared to other regions

Retail Locations for Health Foods – Region

	% Yes						
	Total (n=2,159)	British Columbia (n=290) (B)	Alberta (n=230) (C)	Saskatchewan/Manitoba (n=137) (D)	Ontario (n=829) (E)	Quebec (n=519) (F)	Atlantic (n=155) (G)
Grocery stores	85%	88% C	81%	89%	83%	88% CE	90% C
Mass retailers (Walmart, Costco)	48%	58% EF	54% F	51% F	47% F	39%	49% F
Farmers Market	27%	32% DF	27% D	17%	30% DF	21%	32% DF
Pharmacy/drug stores	18%	20% F	18%	22% F	20% F	13%	18%
Natural Health food stores	17%	20% FG	15%	13%	22% CDFG	13%	10%
Organic grocery stores	9%	13% DFG	9% DG	3%	11% DG	8% G	2%
Convenience store	6%	5%	5%	6%	4%	9% BE	7%
Direct from an online retailer	3%	5% F	4%	6% F	3%	2%	3%
None of the above	4%	3%	3%	4%	5% F	3%	4%

BCDEFG: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown.
Base: Among those who purchased healthy foods or beverages in the last year (n=2,159)

QC4. Which of the following stores do you regularly shop at to buy healthy foods and beverages, or healthy ingredients?

Retail Locations for Health Foods – Age

	% Yes				
	Total (n=2,159)	18 to 34 (n=597) (H)	35 to 44 (n=365) (I)	45 to 54 (n=433) (J)	55+ (n=764) (K)
Grocery stores	85%	81%	80%	85%	91% HIJ
Mass retailers (Walmart, Costco)	48%	46%	47%	49%	49%
Farmers Market	27%	24%	24%	28%	32% HI
Pharmacy/drug stores	18%	15%	17%	16%	22% HJ
Natural Health food stores	17%	13%	16%	21% H	19% H
Organic grocery stores	9%	10% K	10% K	11% K	6%
Convenience store	6%	8% JK	6%	4%	5%
Direct from an online retailer	3%	5% K	3%	3%	2%
None of the above	4%	5%	3%	5%	3%

HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown.
Base: Among those who purchased healthy foods or beverages in the last year (n=2,159)

QC4. Which of the following stores do you regularly shop at to buy healthy foods and beverages, or healthy ingredients?

Locally Grown Products

Importance of Being Locally Grown

Canadians value edible produce being locally grown, with nearly two-thirds of all respondents saying vegetables, tomatoes and apples should be local

- People in Alberta and Saskatchewan/Manitoba are less concerned about their produce being locally grown than are other Canadians
- 18 to 34 year-olds are less concerned about their produce and flowers being locally grown

Importance of Being Locally Grown – Region

	% Very important/Important						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Vegetables	67%	71% CD	56%	51%	68% CD	72% CD	72% CD
Tomatoes	64%	65% CD	48%	49%	67% CD	71% CDG	61% C
Apples	64%	69% CD	43%	33%	68% CD	71% CD	68% CD
Cucumbers	61%	64% CD	49%	45%	61% CD	67% CDE	63% CD
Berries	61%	70% CDEF	47%	42%	62% CD	60% CD	73% CDEF
Fruit (other than berries)	57%	64% CD	41%	37%	59% CD	62% CD	59% CD
Outdoor plants	40%	46% CD	34%	31%	43% CD	38%	45% CD
Potted indoor plants	30%	34% CD	19%	21%	33% CD	33% CD	29% C
Cut flowers	28%	31% CD	17%	16%	32% CD	30% CD	24%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB7. When buying each of the following products, how important is it to you they are grown locally?

Importance of Being Locally Grown – Age

	% Very important/important				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Vegetables	67%	56%	67% H	71% H	74% HI
Tomatoes	64%	52%	63% H	68% H	72% HI
Apples	64%	55%	64% H	66% H	70% H
Cucumbers	61%	51%	60% H	64% H	68% HI
Berries	61%	51%	58% H	65% HI	66% HI
Fruit (other than berries)	57%	49%	55%	60% H	63% HI
Outdoor plants	40%	33%	41% H	41% H	46% H
Potted indoor plants	30%	28%	32%	29%	32%
Cut flowers	28%	26%	31%	28%	29%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QB7. When buying each of the following products, how important is it to you they are grown locally?

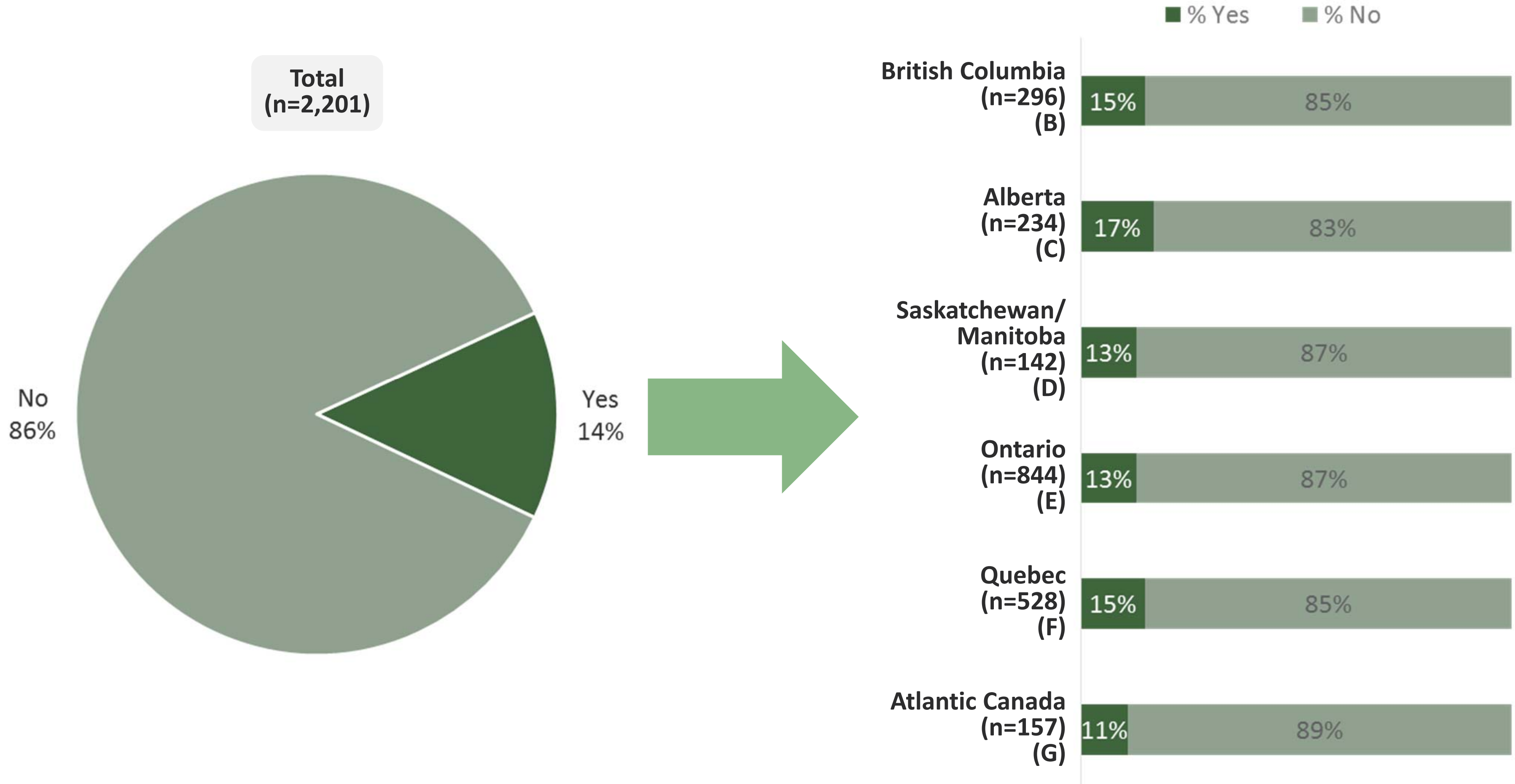
Addressing Dietary & Health Concerns

Addressing Dietary & Health Concerns

Only a small percentage of Canadians (one in ten) have been unable to find a food or beverage addressing a specific dietary concern

- Many said they couldn't find something for a specific health benefit while others said they were looking for a specific ingredient or product type
- Appeal and format are more important to 45 to 54 year olds than to other age groups

Unable to Address Dietary Preferences or Health Concerns – Regions



BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QC5. Have you looked for a food or beverage to address dietary preferences or health issues but were unable to find something?

Unable to Find Food and Beverage – Regions

	Among consumers who were unable to find something						
	Total (n=311)	British Columbia (n=45) (B)	Alberta (n=40) (C)	Saskatchewan/Manitoba (n=18) (D)	Ontario (n=113) (E)	Quebec (n=77) (F)	Atlantic (n=18) (G)
Specific Health Benefit	37%	50% CF	25%	27%	42% F	27%	58%
Specific Ingredient(s)	30%	44%	37%	10%	27%	29%	26%
Specific Product Type	21%	24%	15%	24%	17%	30%	9%
Appeal	9%	8%	10% F	6%	14% F	1%	21%
Specific Brand	5%	-	9%	-	4%	10%	4%
Drink or Powder Format	3%	7% F	8% F	5%	2%	-	-
Other/Nothing	10%	6%	19%	9%	10%	9%	11%
Don't Know	14%	6%	10%	33%	17%	14%	5%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: Respondents who looked for a food or beverage to address dietary preferences or health issues (n=311)
QC6. What were you looking for?

Unable to Find Food and Beverage – Age

	Among consumers who were unable to find something				
	Total (n=311)	18 to 34 (n=99) (H)	35 to 44 (n=63) (I)	45 to 54 (n=54) (J)	55+ (n=96) (K)
Specific Health Benefit	37%	38%	34%	40%	38%
Specific Ingredient(s)	30%	25%	30%	34%	34%
Specific Product Type	21%	29% IK	12%	32% IK	13%
Appeal	9%	4%	13% H	23% HK	5%
Specific Brand	5%	6%	5%	3%	5%
Drink or Powder Format	3%	3%	-	10% IK	1%
Other/Nothing	10%	10%	16%	6%	10%
Don't Know	14%	18%	11%	13%	13%

HIJK: Significantly higher than sub-group represented by that letter.
Base: Respondents who looked for a food or beverage to address dietary preferences or health issues (n=311)
QC6. What were you looking for?

Sources of Information for Health Foods

Sources of Information for Health Foods

There are many sources available for people to become informed about health foods and ingredients. In additional to general information found through mainstream outlets, there are also resources specific to food production and health.

- When looking to become more informed about eating health foods and ingredients, more Canadians rely on online searches or friends/family members
- Dr. Oz is the most familiar source of information on food production for Canadians
- In general, younger Canadians are slightly more familiar with the information sources related to food production
- Smart phone usage while shopping is more common in younger adults, while those over age 44 rarely use a smart phone to look up information

Sources of Information for Health Foods – Region

	% Yes						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Online/Internet search	47%	52% F	52% F	48%	50% F	39%	44%
Friends or family members	43%	41%	44%	47%	45%	42%	36%
Health professional	35%	35%	37%	29%	34%	36%	36%
Magazine or newspaper	28%	34% FG	29%	32% G	28%	26%	20%
Scientific studies	22%	23%	19%	20%	22%	24%	19%
Saw it featured at a consumer wellness TV show	19%	17% G	15%	17% G	14%	35% BCDEG	8%

BCDEFG: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: All respondents (n=2,201)

QE1. Where do you typically get your information on healthy eating? Select all that apply.

Sources of Information for Health Foods – Region (cont.)

	% Yes						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Social media	14%	12%	12%	14%	15%	14%	16%
Product/ company website	13%	16%	10%	15%	11%	17% CE	12%
Retailer/ Health store staff	11%	16% EF	11%	13%	9%	11%	11%
Saw it featured at an in-store demonstration/ product sample	10%	12% E	8%	6%	8%	15% CDE	11%
Alternative health care professional	9%	10%	8%	7%	9%	11% G	5%
Don't know	11%	8%	10%	11%	12%	9%	15% B

BCDEFG: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: All respondents (n=2,201)

QE1. Where do you typically get your information on healthy eating? Select all that apply.

Sources of Information for Health Foods – Age

	% Yes				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Online/Internet search	47%	51% K	52% K	46%	43%
Friends or family members	43%	42%	44%	41%	44%
Health professional	35%	30%	29%	37% HI	40% HI
Magazine or newspaper	28%	21%	24%	28% H	37% HIJ
Scientific studies	22%	27% IK	17%	22%	20%
Saw it featured at a consumer wellness TV show	19%	13%	18% H	21% H	24% H

HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown.
Base: All respondents (n=2,201)
QE1. Where do you typically get your information on healthy eating? Select all that apply.

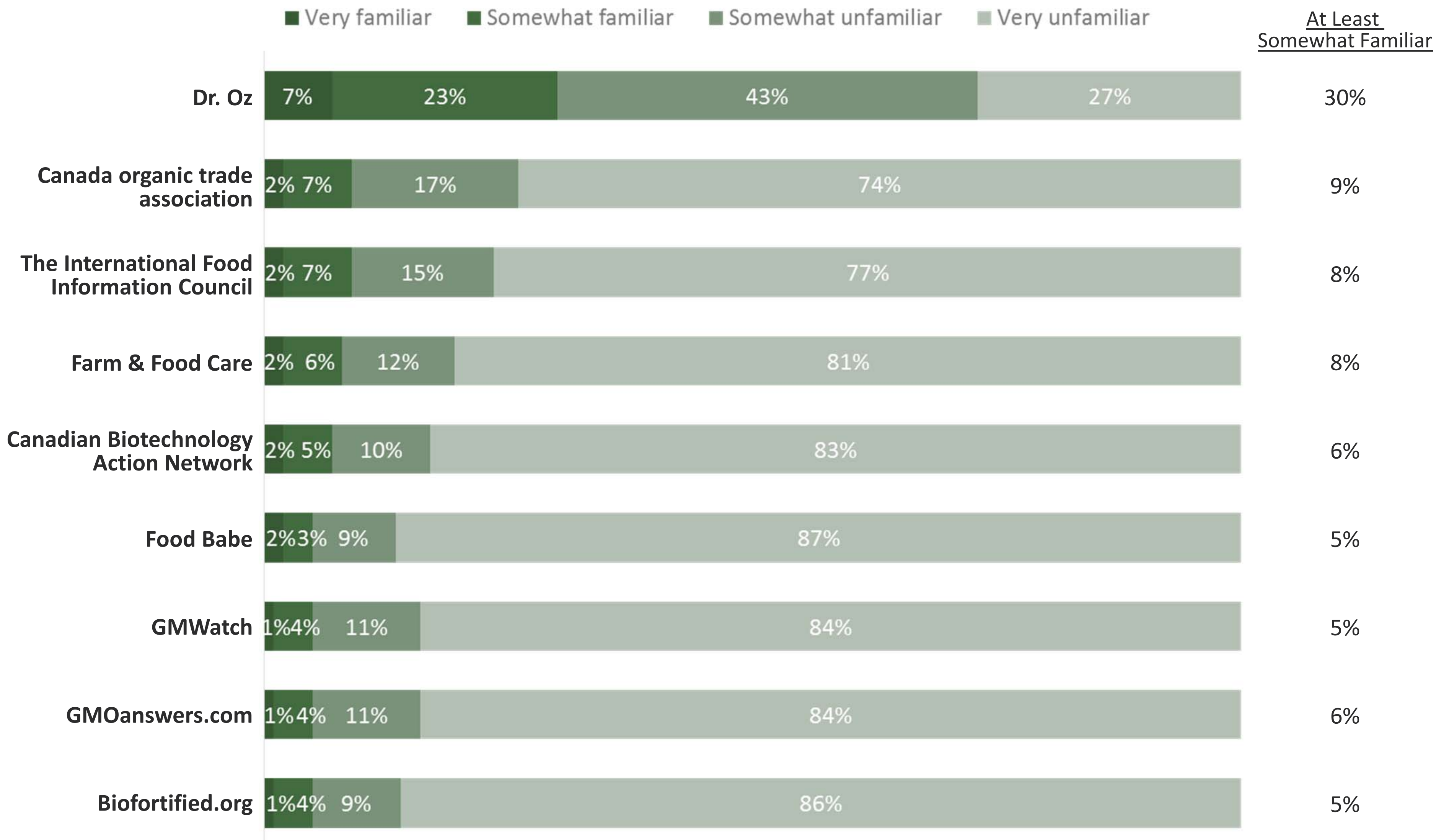
Sources of Information for Health Foods – Age (cont.)

	% Yes				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Social media	14%	17% JK	16% J	9%	13%
Product/company website	13%	15% J	15% J	10%	14%
Retailer/Health store staff	11%	9%	10%	10%	14% H
Saw it featured at an in-store demonstration/product sample	10%	7%	9%	8%	15% HIJ
Alternative health care professional	9%	8%	9%	10%	9%
Don't know	11%	14% JK	12% K	10%	8%

HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: All respondents (n=2,201)

QE1. Where do you typically get your information on healthy eating? Select all that apply.

Information Source Familiarity – All Canadians



Base: All respondents (n=2,201)

QE2. How familiar are you with each of the following sources of information on food production:

Information Source Familiarity – Regions

	% Very/Somewhat Familiar						
	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Dr. Oz	30%	37% F	35% F	32% F	37% FG	14%	27% F
Canada organic trade association	9%	11% D	8%	4%	12% DF	7%	7%
The International Food Information Council	8%	9%	7%	4%	10% D	7%	6%
Farm & Food Care	8%	8%	9%	6%	9% F	6%	5%
Canadian Biotechnology Action Network	6%	6%	5%	2%	8% DG	7% D	2%
GMOanswers.com	6%	8% DFG	7%	3%	6%	4%	2%
Food Babe	5%	4%	4%	1%	6% D	4%	3%
GMWatch	5%	7%	5%	2%	7% G	5%	2%
Biofortified.org	5%	5%	4%	1%	6% D	6% D	4%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QE2. How familiar are you with each of the following sources of information on food production:

Information Source Familiarity – Age

	% Very/Somewhat Familiar				
	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Dr. Oz	30%	26%	32% H	29%	33% H
Canada organic trade association	9%	12% JK	13% JK	5%	7%
The International Food Information Council	8%	9% J	9% J	5%	9% J
Farm & Food Care	8%	9% J	8% J	4%	8% J
Canadian Biotechnology Action Network	6%	9% JK	8% JK	4%	4%
GMOanswers.com	6%	8% JK	8% JK	5%	3%
Food Babe	5%	7% JK	7% JK	3%	2%
GMWatch	5%	8% JK	7% JK	3%	4%
Biofortified.org	5%	8% JK	7% JK	4%	3%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QE2. How familiar are you with each of the following sources of information on food production:

Smart Phone Shopping – Regions

	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Yes	18%	18%	17%	21%	19%	17%	14%
No	82%	82%	83%	79%	81%	83%	86%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QE3. Do you use your smart phone for product information when shopping?

Smart Phone Shopping – Age

	Total (n=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Yes	18%	32% IJK	25% JK	14% K	5%
No	82%	68%	75% H	86% HI	95% HIJ

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QE3. Do you use your smart phone for product information when shopping?

Consumption of Natural Health Products

Consumption of Natural Health Products

Natural health products are purchased for a variety of reasons, and both consumption and frequency of use vary across groups.

- Older adults consume more natural health products on a daily basis
- People in Saskatchewan/Manitoba have used more vitamins and cold medicines at least once compared to those in other regions
- British Columbians tend to consume more calcium, probiotics and echinacea than other regions
- Older Canadians in general have tried more natural health products than younger adults
- Most people consume natural health products for their general health, as well as to boost their immune systems

Consumption of Natural Health Products – Region

	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Daily	22%	27% F	24% F	23%	23% F	17%	24%
Weekly	15%	15% G	15%	17% G	17% FG	12%	7%
Monthly	8%	12% DE	8%	3%	6%	10% DE	11% D
Only during certain seasons	16%	11%	14%	15%	14%	23% BCDEG	15%
I do not use	39%	36%	39%	42%	39%	37%	44%

BCDEFG: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
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=2,201)	18 to 34 (n=613) (H)	35 to 44 (n=372) (I)	45 to 54 (n=442) (J)	55+ (n=774) (K)
Daily	22%	15%	20% H	23% H	29% HI
Weekly	15%	20% JK	16% K	14% K	10%
Monthly	8%	11% JK	11% JK	7%	6%
Only during certain seasons	16%	17%	16%	17%	14%
I do not use	39%	37%	37%	39%	41%

HIJK: Significantly higher than sub-group represented by that letter.
Base: All respondents (n=2,201)
QF1. Which of the following best describes your use of natural health products? Do you use them...

Types of Natural Health Products Used – Region

	% Ever Used						
	Total (n=1,351)	British Columbia (n=190) (B)	Alberta (n=144) (C)	Saskatchewan/Manitoba (n=82) (D)	Ontario (n=516) (E)	Quebec (n=331) (F)	Atlantic (n=89) (G)
Vitamins/minerals	70%	78% F	77% F	86% EFG	72% F	55%	65%
Calcium	44%	54% EF	47%	46%	43%	37%	42%
Omega 3/essential fatty acids - fish/marine sourced	38%	37%	43% F	36%	41% F	31%	45% F
Probiotics	35%	45% DF	35%	28%	38% F	27%	37%
Cold medicines (i.e. cold-fx)	29%	32% F	35% F	48% BEF	27% F	20%	32% F
Echinacea	24%	31% CE	20%	29%	22%	24%	22%
Antioxidants	24%	26%	22%	15%	26% DF	20%	26%
Glucosamine	22%	28% E	21%	25%	20%	23%	22%
Omega 3 from plant sources	18%	17%	21%	19%	17%	19%	14%

BCDEFG: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: Among those who have used natural health products (n=1,351)
QF2. Which natural health products, sold in dosage form, have you ever used? Select all that apply.

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

	% Ever Used						
	Total (n=1,351)	British Columbia (n=190) (B)	Alberta (n=144) (C)	Saskatchewan/Manitoba (n=82) (D)	Ontario (n=516) (E)	Quebec (n=331) (F)	Atlantic (n=89) (G)
Essential oils	18%	20%	19%	16%	16%	20%	15%
Melatonin	17%	19% F	18% F	24% F	19% F	10%	17%
Ginseng	15%	20% F	18% F	14%	16% F	10%	18%
Protein powder - plant sources	13%	17% FG	10%	12%	17% FG	5%	7%
Homeopathic medicines	12%	16% DG	9%	6%	12%	14%	6%
Protein powder - animal sources	8%	9%	7%	17% CEFG	9% F	5%	6%
Hemp Oil Capsules	3%	3%	5%	5%	3%	1%	-
None of the above	5%	6%	4%	3%	4%	7%	5%

BCDEFG: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: Among those who have used natural health products (n=1,351)
QF2. Which natural health products, sold in dosage form, have you ever used? Select all that apply.

Types of Natural Health Products Used – Age

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

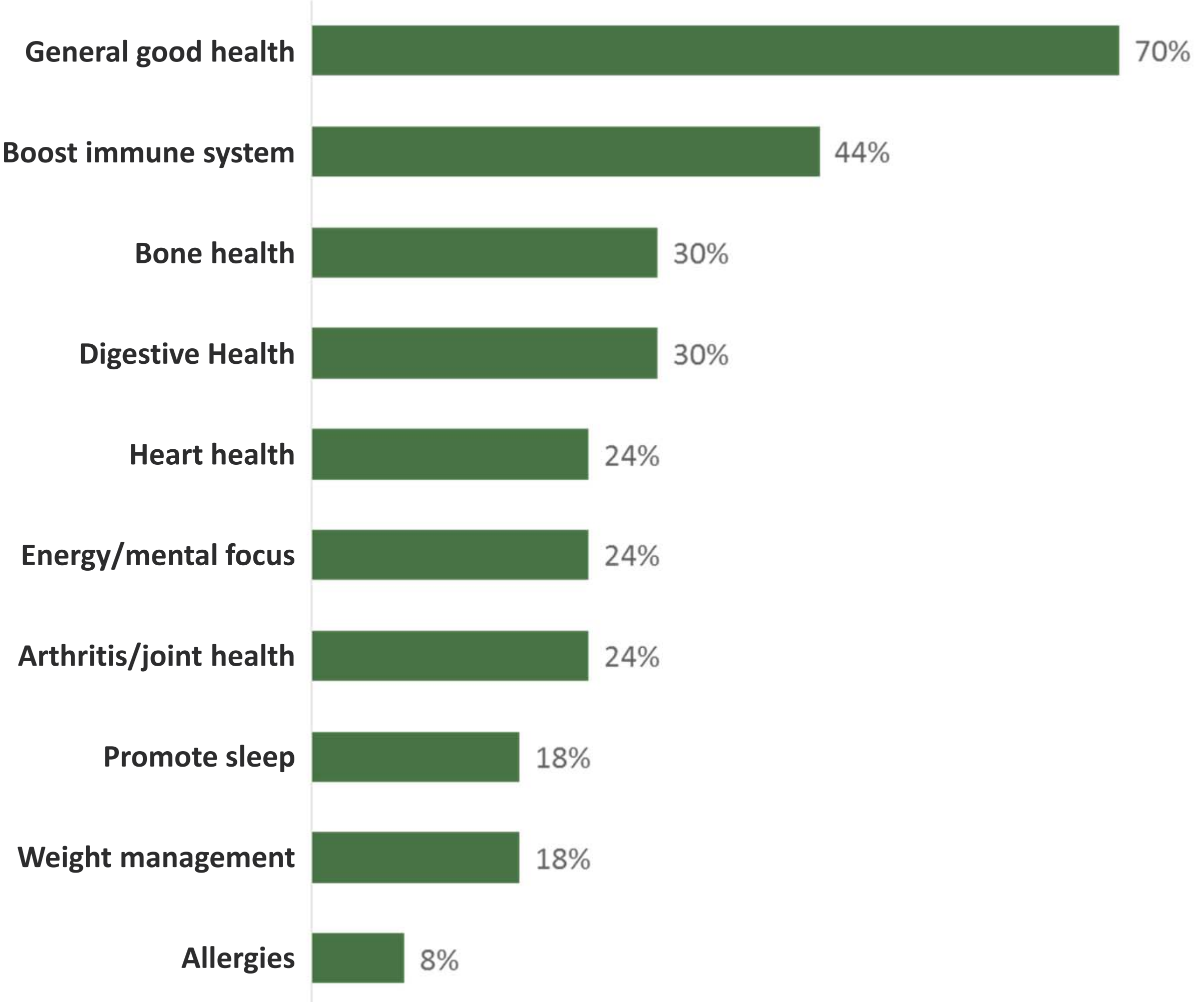
HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: Among those who have used natural health products (n=1,351)
QF2. Which natural health products, sold in dosage form, have you ever used? Select all that apply.

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

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

HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown
Base: Among those who have used natural health products (n=1,351)
QF2. Which natural health products, sold in dosage form, have you ever used? Select all that apply.

Reasons for Consuming Natural Health Products – Total



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

Base: Among those who have used natural health products (n=1,351)

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

Purchasing Natural Health Products

Purchasing Natural Health Products

There are many retail outlets for people to choose from when it comes to buying natural health products. Despite differences in age and region, some are used more commonly than others.

- Natural health products are most often bought at pharmacies/drug stores, grocery stores, and mass retailers
- People in Quebec rely heavily on drug stores, in Ontario it is split between pharmacies, grocery and mass retailers, whereas people in other regions mainly purchase NHPs at grocery stores
- Adults 55 and older buy natural ingredients at health food stores much more than younger Canadians

Retail Locations for Natural Health Products – Region

	% Yes						
	Total (n=1,351)	British Columbia (n=190) (B)	Alberta (n=144) (C)	Saskatchewan/Manitoba (n=82) (D)	Ontario (n=516) (E)	Quebec (n=331) (F)	Atlantic (n=89) (G)
Pharmacy/drug stores	50%	51%	39%	42%	47%	63% BCDEG	45%
Grocery stores	49%	55% EF	61% EF	56% F	45%	38%	65% EF
Mass retailers (e.g., Walmart, Costco)	43%	38%	53% BF	52% F	45% F	33%	46% F
Health food stores	29%	38% FG	28%	25%	32% F	24%	22%
Organic grocery stores	12%	12% G	11% G	8%	15% G	12% G	2%
Direct from an online retailer	9%	10%	12% FG	7%	10% FG	6%	3%
Natural health practitioner (e.g., naturopath, homeopath)	6%	4%	2%	5%	10% BCF	3%	10% CF

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

QF4. From which of the following retail outlets do you buy natural health products? Select all that apply.

Retail Locations for Natural Health Products – Age

	% Yes				
	Total (n=1,351)	18 to 34 (n=389) (H)	35 to 44 (n=236) (I)	45 to 54 (n=270) (J)	55 to 65 (n=456) (K)
Pharmacy/drug stores	50%	46%	42%	53% I	56% HI
Grocery stores	49%	45%	45%	50%	53% H
Mass retailers (e.g., Walmart, Costco)	43%	40%	38%	48% HI	44%
Health food stores	29%	25%	25%	30%	34% HI
Organic grocery stores	12%	13%	13%	14%	10%
Direct from an online retailer	9%	9%	8%	8%	9%
Natural health practitioner (e.g., naturopath, homeopath)	6%	8%	7%	7%	4%

HIJK: Significantly higher than sub-group represented by that letter.
Note: Only total mentions of 3% and higher are shown.
Base: Among those who use natural health products (n=1,351)
QF4. From which of the following retail outlets do you buy natural health products? Select all that apply.

Demographics

Demographics – Region

	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/ Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Gender							
Male	48%	47%	44%	45%	49%	53%	44%
Female	52%	53%	56%	55%	51%	47%	56%
Age							
18 to 34	28%	16%	22%	27%	29%	36%	25%
35 to 54	37%	43%	38%	41%	38%	31%	31%
55+	35%	42%	40%	32%	33%	32%	43%
Mean	*47.9*	*51.7*	*49.1*	*46.9*	*47.0*	*46.3*	*49.7*
Income							
Under $35,000	19%	23% C	10%	15%	17% C	22% CE	29% CDE
$35,000 to under $49,999	14%	10%	11%	14%	13%	18% BCE	19% BCE
$50,000 to under $74,999	23%	24%	30% EFG	25%	22%	22%	18%
$75,000 to under $99,999	19%	23% CG	15%	15%	21% G	19% G	10%
$100,000 to under $149,999	17%	17%	21%	23% F	18%	15%	15%
$150,000 or more	8%	4%	13% BF	8%	9% BF	4%	9% BF

Base: All respondents (n=2,201)

Demographics – Region (cont'd)

	Total (n=2,201)	British Columbia (n=296) (B)	Alberta (n=234) (C)	Saskatchewan/ Manitoba (n=142) (D)	Ontario (n=844) (E)	Quebec (n=528) (F)	Atlantic (n=157) (G)
Who Makes the Household Grocery List							
Yourself	73%	73%	74%	73%	73%	72%	72%
Partner/spouse	21%	21%	20%	19%	20%	23%	26%
Other family member	5%	5%	4%	6%	5%	4%	1%
Other	1%	1%	1%	2%	2%	1%	1%
% Of Household Grocery Shopping							
All	43%	47%	38%	34%	42%	48%	40%
Almost all	28%	22%	35%	36%	27%	27%	32%
About half	21%	24%	22%	19%	22%	20%	17%
Less than half	5%	5%	5%	9% F	6% F	4%	6%
None	2%	2%	1%	2%	3%	1%	5%
Weekly Household Spending on Groceries							
<$50	11%	13%	14%	15%	12%	6%	14%
$50 to $100	38%	40%	38%	36%	39%	34%	39%
$100 to $200	41%	33%	37%	37%	39%	49%	39%
>$200	11%	13%	11%	11%	10%	11%	9%

Base: All respondents (n=2,201)

Thank you!

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