



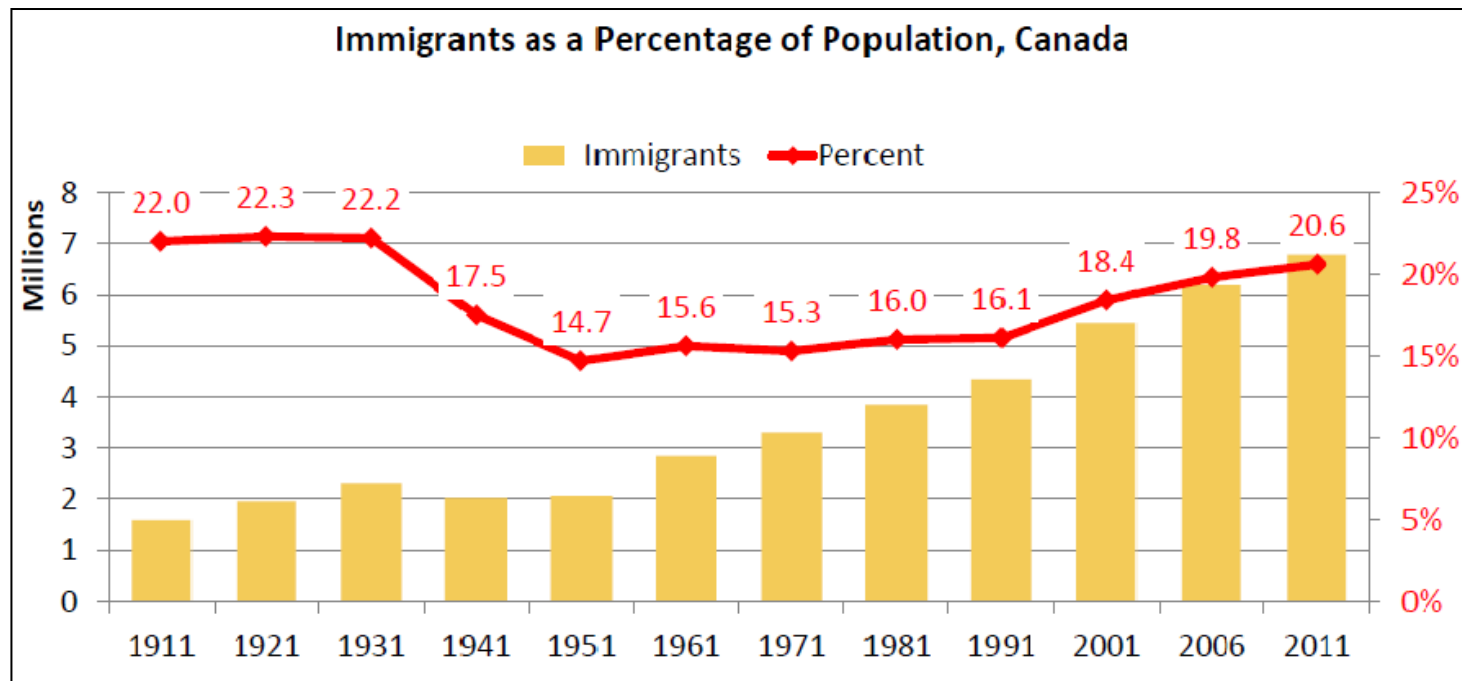
# **Foodland Ontario: *Consumer Behaviour Findings***

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# Canada's Evolving Demographic Landscape

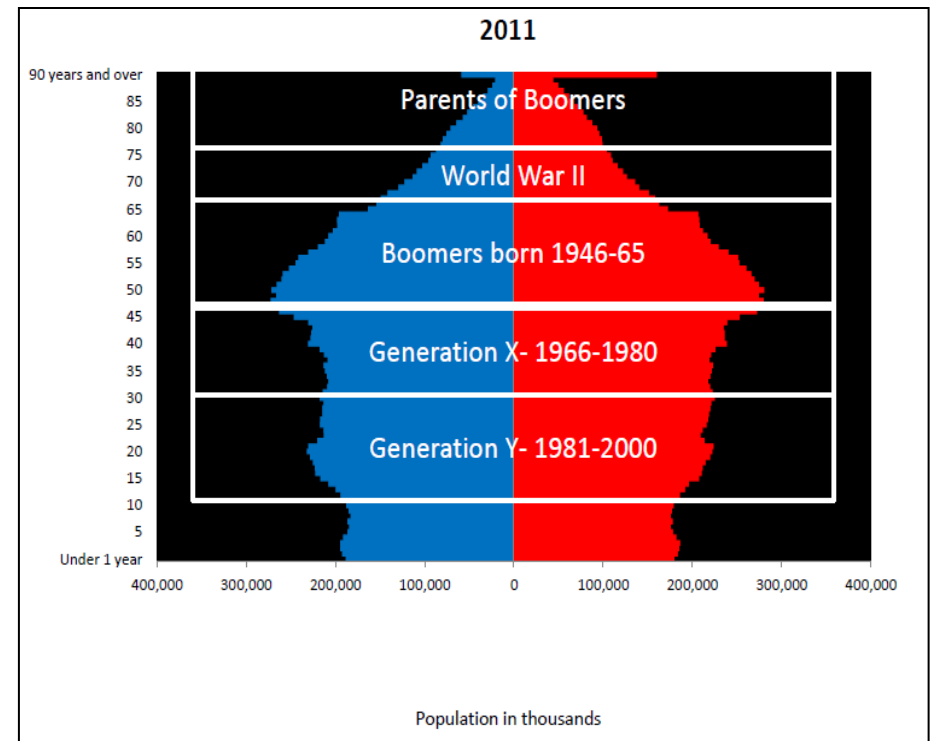
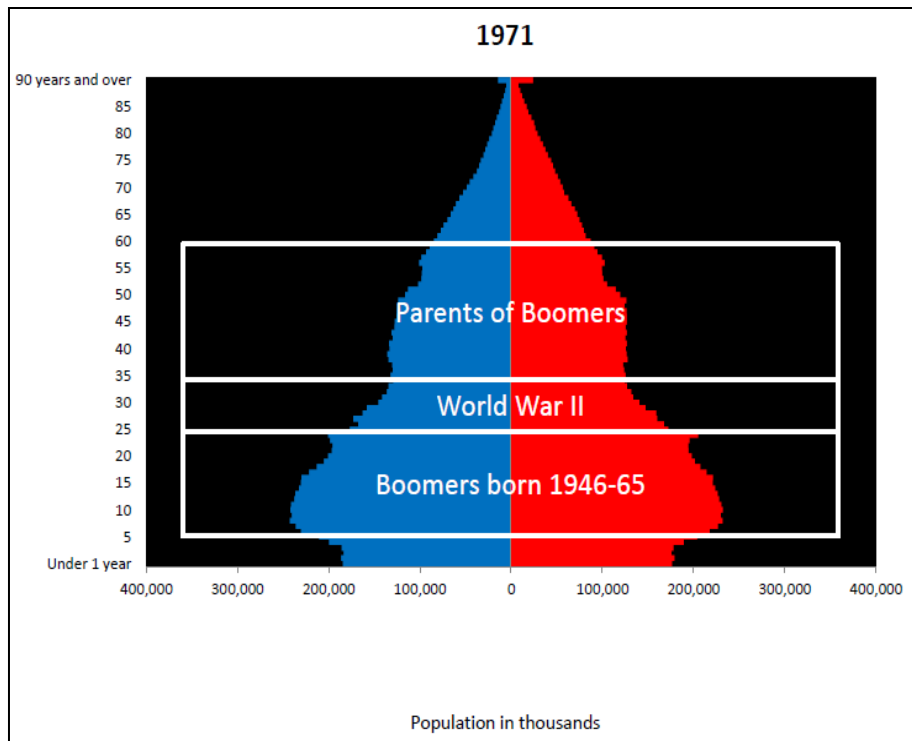
## New Canadians\*



\*Source: Statistics Canada, image courtesy of Environics Analytics

# Canada's Evolving Demographic Landscape

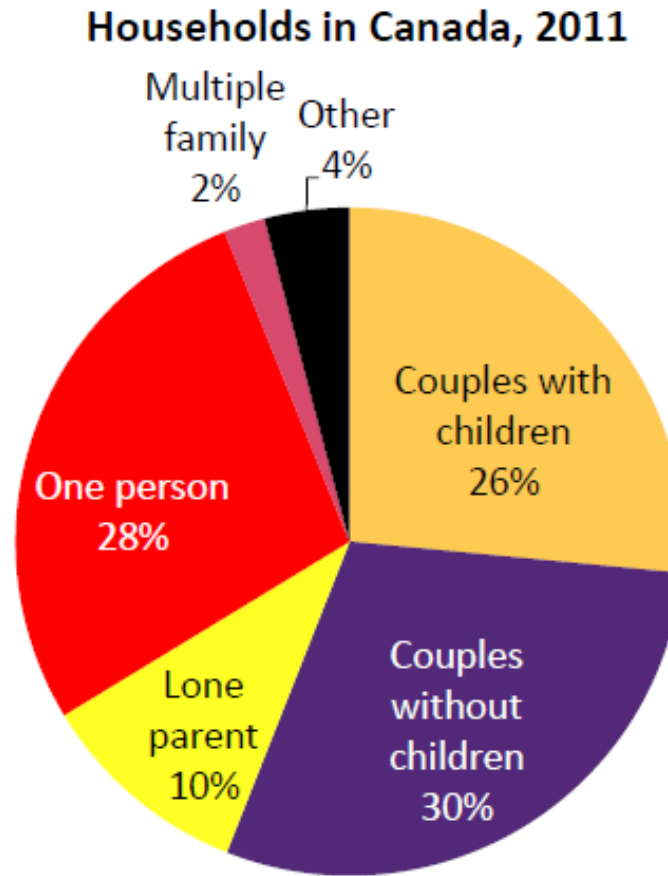
## The Aging Population\*



\*Source: Statistics Canada, image courtesy of Environics Analytics

# Canada's Evolving Demographic Landscape

## Changing Household\*



\*Source: Statistics Canada, image courtesy of Environics Analytics

# Transformation of Canadian Kitchens

Several seismic shifts are happening in Canada's population, leading to behaviour shifts in food & beverage choices: the aging population, the growing ethnic cohort, shrinking household sizes, urbanization of the population among many others.



# Who Is The Ontario Principal Grocery Shopper?



## Ontario's principal grocery shopper

- Person who self identifies themselves as having either the primary or shared responsibility for food shopping in their household
- Adults age 24 – 54
- Approximate demographics : 60% women and 40% men

# Who Is The Ontario Principle Grocery Shopper?



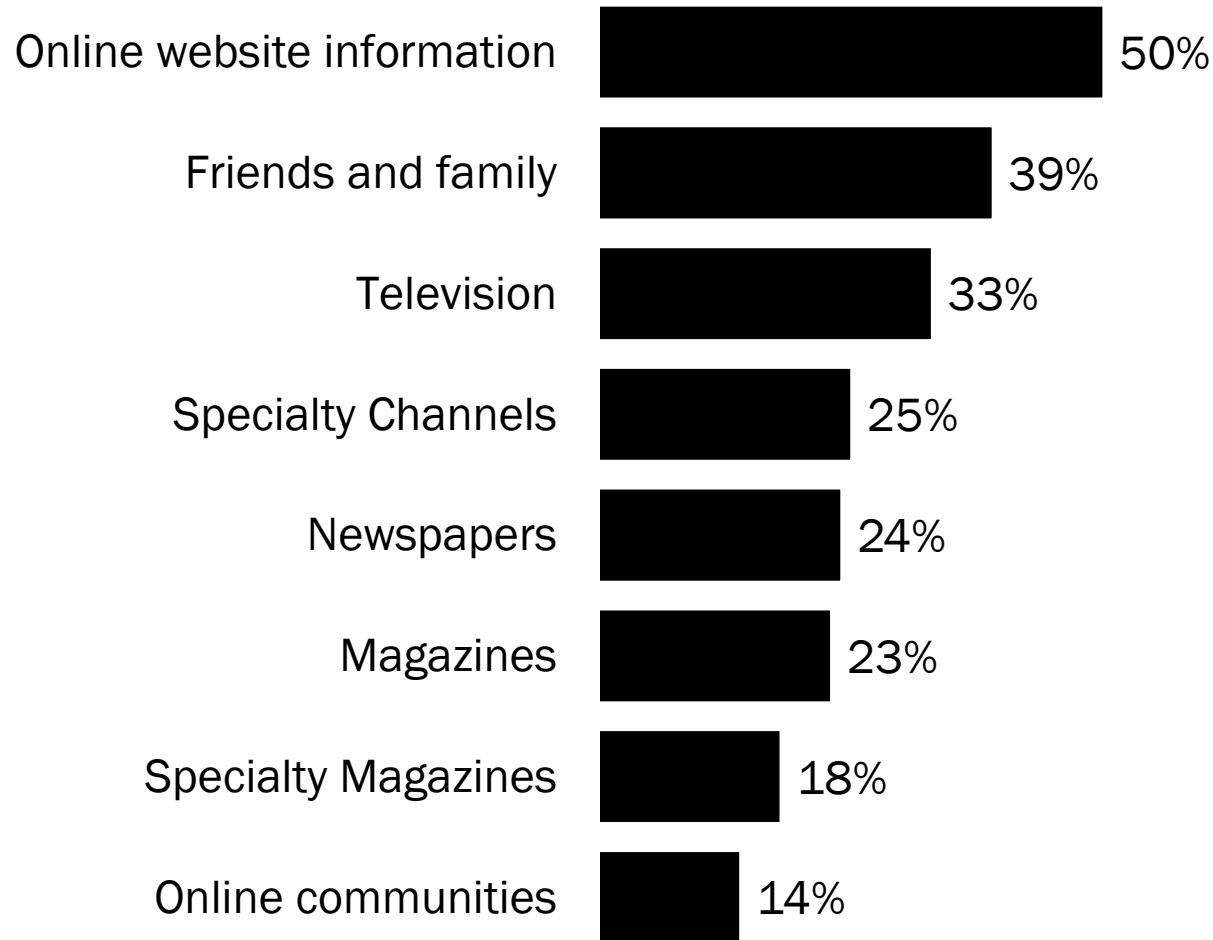
## On average, shoppers report:

- Spending \$470 a month on food related groceries
- Making nearly 4 major shopping trips, close to 5 minor and 3 urgent trips per month

## Shoppers are reporting:

- Same amount of fresh Ontario food from Ontario as a year ago (over 60%)
- Vast majority (87%) are eating meals cooked at home
- Outside of fresh fruit and vegetables, shoppers are challenged with finding the Ontario option, eggs being the next easiest followed by dairy and meat

# Where They Are Sourcing Information



\* Source: 2013 Usage and Attitudes Survey



# Using Digital Media To Get Information

The Facebook logo, consisting of the word "facebook" in white lowercase letters on a blue rectangular background.The YouTube logo, with the word "You" in black and "Tube" in white inside a red rounded rectangle.The Google logo, with the word "Google" in its multi-colored font.

## Shoppers are reporting:

- Over 1 in 10 are using social media to locate, discover or discuss fresh food – significantly higher than in 2011.
- Facebook is the dominate source (92%) followed by YouTube (46%) and Pinterest (36%) and Twitter (35%)
- 1 out of 2 claim to use Google to locate, discover or discuss fresh local food

\* Source: 2012 Advertising & Awareness Tracking Study



## Personal Values

- Freshness
- Price
- Nutritional value
- Appearance
- Safety
- Taste
- Shelf Life

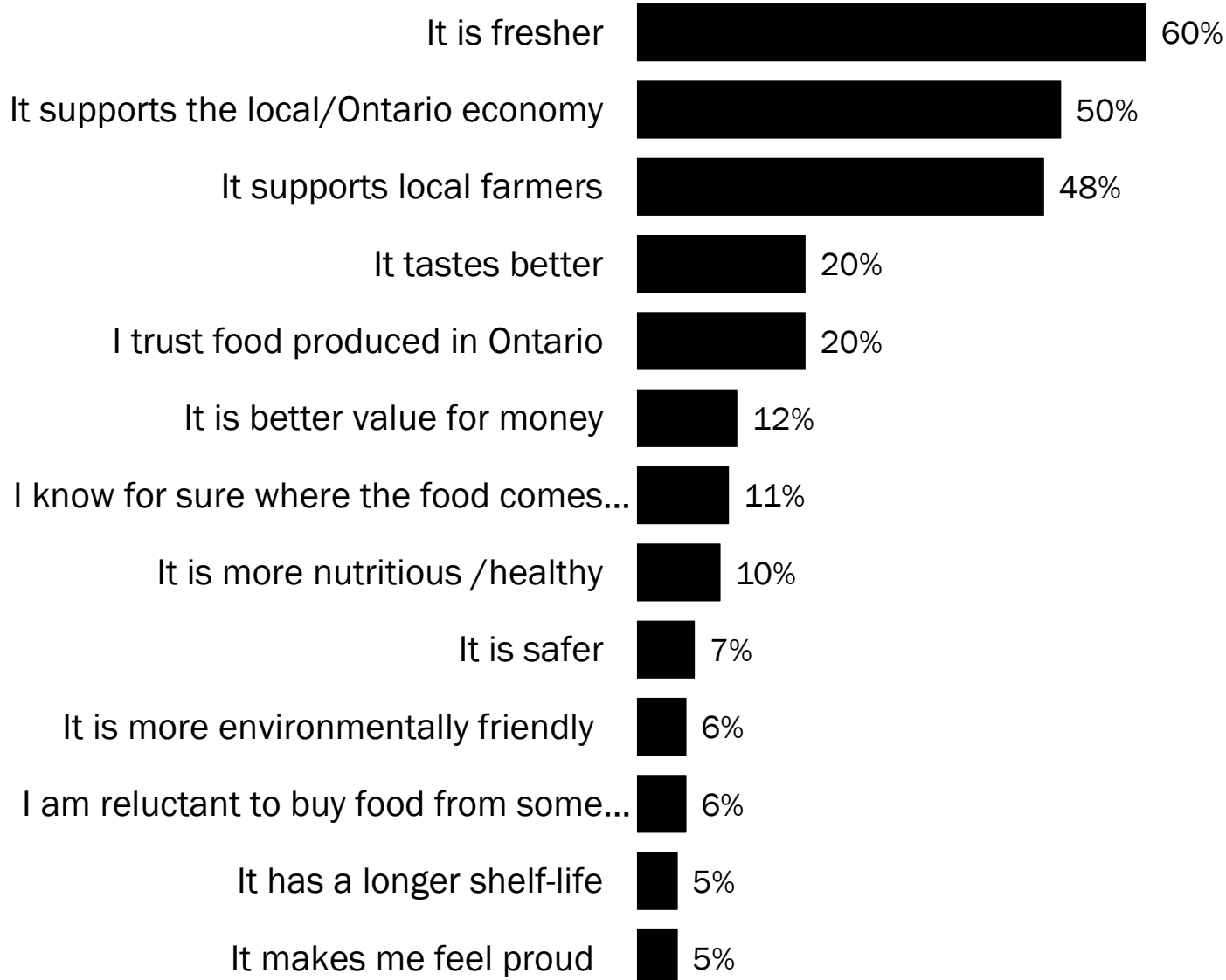
## Social Values

- Benefits to farmers
- Benefits to the economy
- Benefits to the environment

# Importance of Factors in Overall Purchasing

Top 3 box – score 8, 9 and 10 on a 10 point scale	2013	2014
Freshness	90	90
Safe or hygienic production	79	77
Price	75	77
Healthfulness/nutritional content	77	75
Appearance	74	73
Wholesomeness (e.g., rich with vitamins/minerals,etc.)	71	70
Concern about the presence of pesticides or food additives	64	64
Locally grown/produced	59	60
Environmentally friendly	54	53
Ethical production (e.g., compassion for animals in production	54	54
Length of time it takes to get to market	55	54
Long shelf-life	45	47
Familiarity of producer or brand name	37	37
Organically grown/produced	27	28

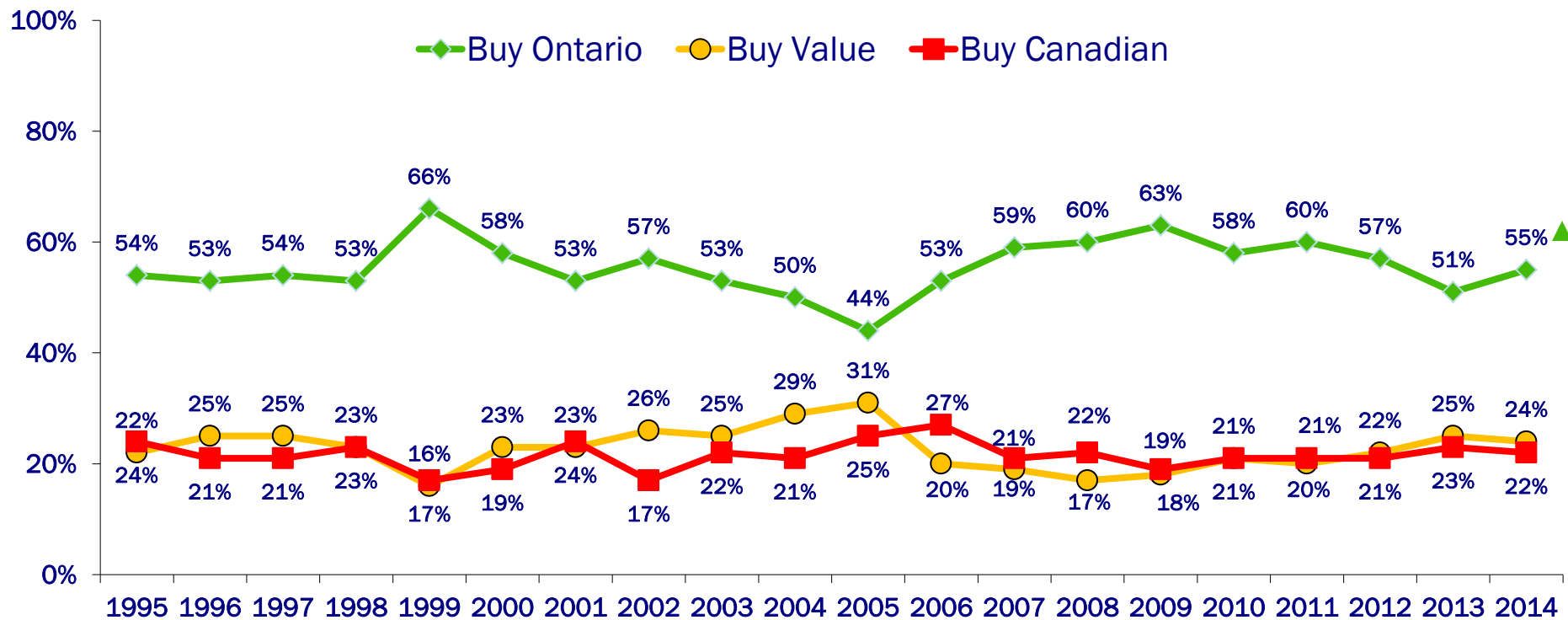
# Why is Buying Local Important?



\* Source: 2013 Usage and Attitudes Survey

# Preference to Buy Ontario vs. to Buy On Value

- Preference to buy Ontario has increased by a significant margin versus last year reversing the decline observed the past few seasons.



**Q4. Which of the following three statements best describes your point of view when it comes to shopping for fresh food? Base: All Respondents n=1485**

It really doesn't matter to me where the fresh food I buy comes from as long as it is the best price for the quality I want.  
 As a general rule, I try to buy locally grown or produced foods as much as possible in preference to those from outside of Ontario.  
 I don't really care which province the fresh food I buy comes from, but I do try to buy food that is grown or produced in Canada rather than imports.

# How Foodland Ontario Can Help

**92%**

Of Ontario's principal grocery shoppers recognize the Foodland Ontario logo\*

**80%**

Of Ontario's principal grocery shoppers intend to purchase fresh Ontario food\*

**83%**

Support the Foodland Ontario program\*



\*Source: 2014 Foodland Ontario Advertising & Awareness Tracking

# How Foodland Ontario Drives Demand

## Help consumers care about the good things that grow in Ontario

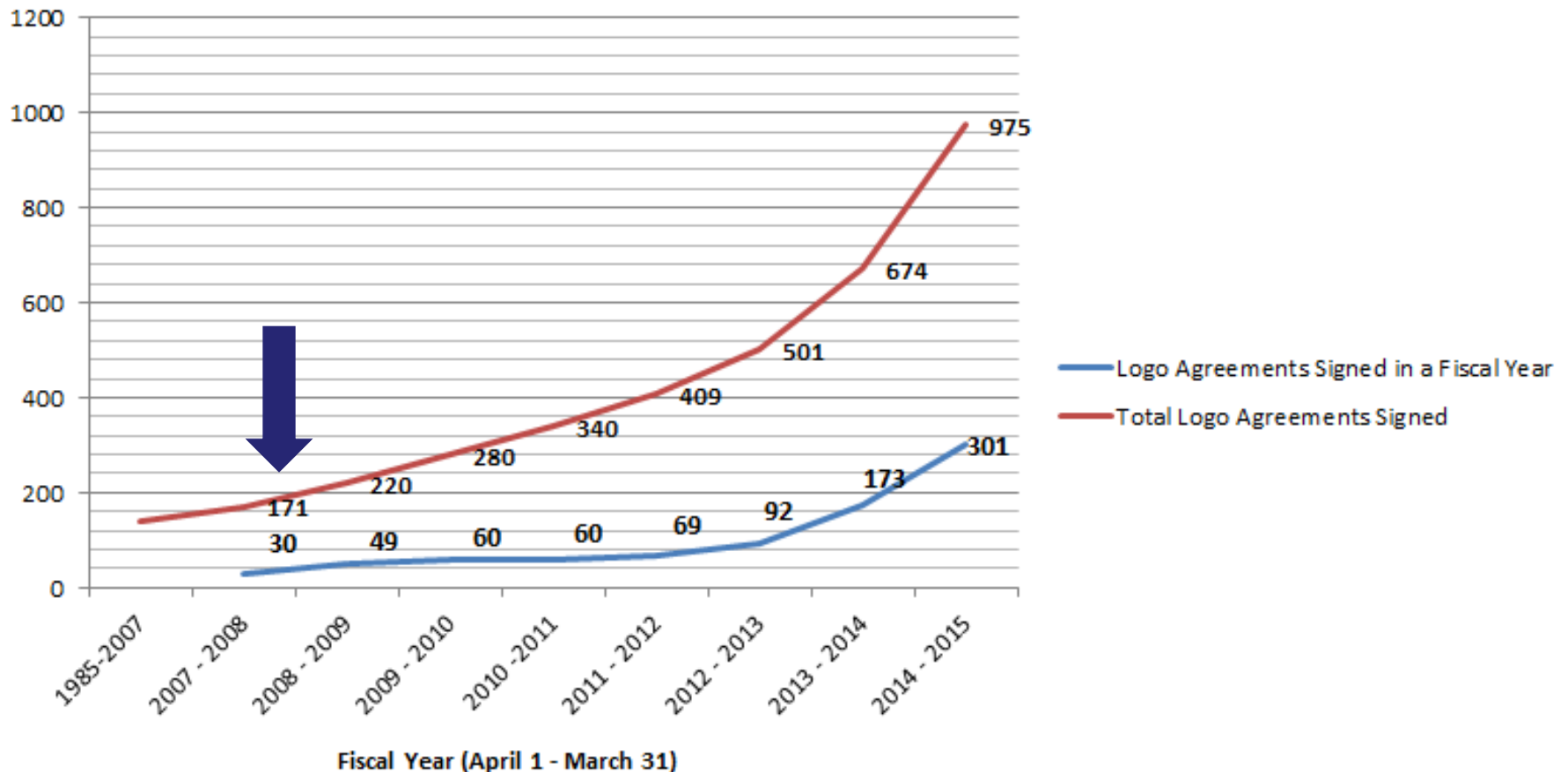
- Showcase the depth, breadth and variety of local food
- Communicate the size and diversity of the Ontario food industry
- Encourage and empower consumers to ask for Ontario food when they don't see it in grocery stores, markets and restaurants

*“Build a connection in the minds of consumers between their food and the Ontario farmers who produce it”*



# Leveraging Partnerships

- Almost 1,000 Logo Agreements
- Ave 25% increase in logo agreements year-over-year for the last 5 years since 2008/09





# One Last Thing To Remember...

## How To Increase Ontario Consumption?

- Regardless of who the consumer is – one of the strongest drivers of increased propensity to purchase is **being able to find the product.**
- Be aware of the challenge that consumers have finding the Ontario option – clear labelling is vital

## Three Simple Steps to Get The Foodland Ontario Logo

1. Ensure your product meets the Consumer and Industry approved definitions of Ontario Food Products [www.foodlandontario.ca](http://www.foodlandontario.ca)
2. Prepare an email, letter or fax describing your products and your intended use of the Foodland Ontario logo to our Client Services Officer

[sandra.jones@ontario.ca](mailto:sandra.jones@ontario.ca)

1-888-466-2372 ext.63947

3. Sign the Foodland Ontario logo agreement



**Thank You**

