



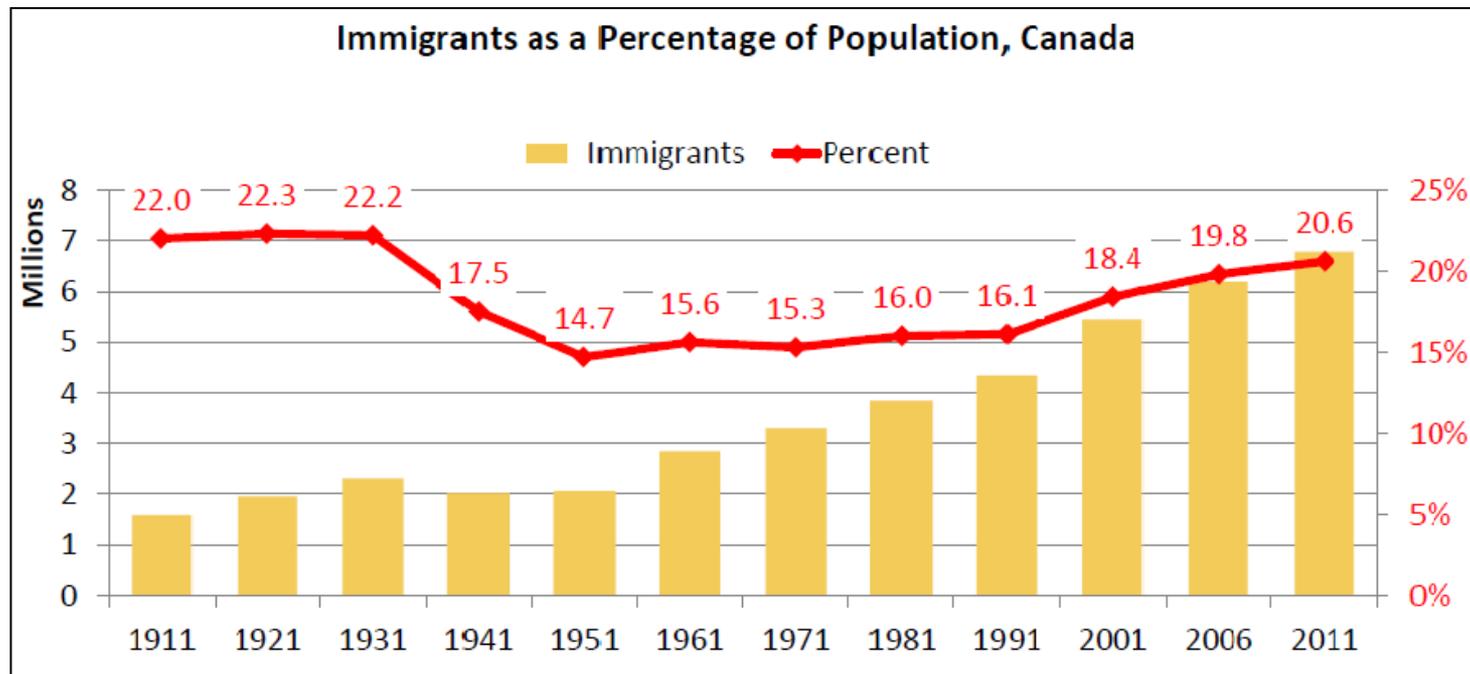
Foodland Ontario: *Consumer Behaviour Findings*

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Canada's Evolving Demographic Landscape

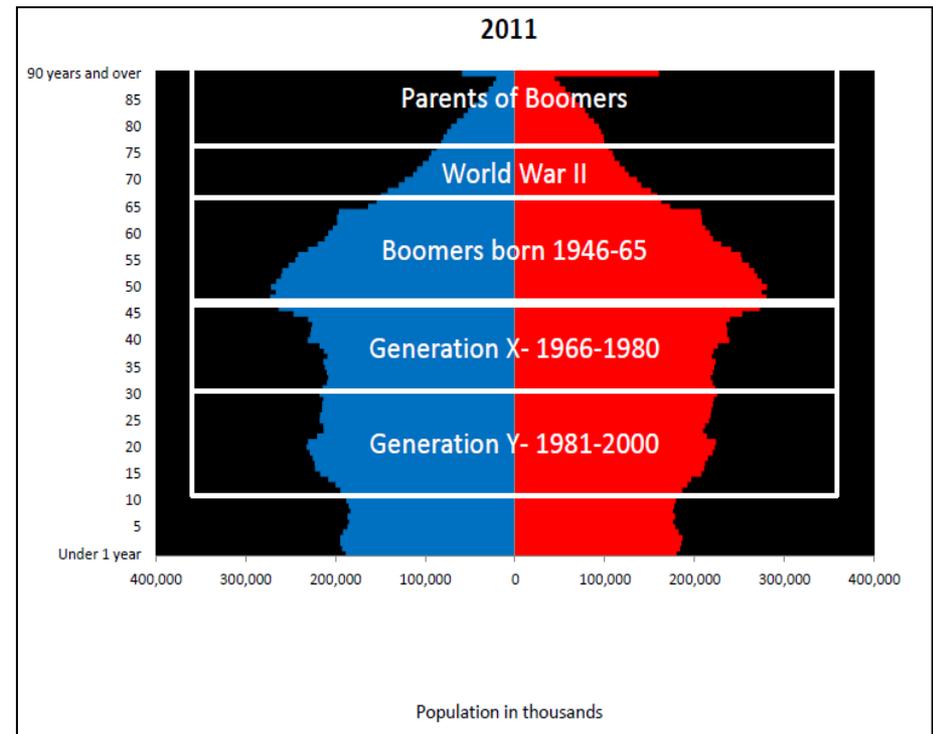
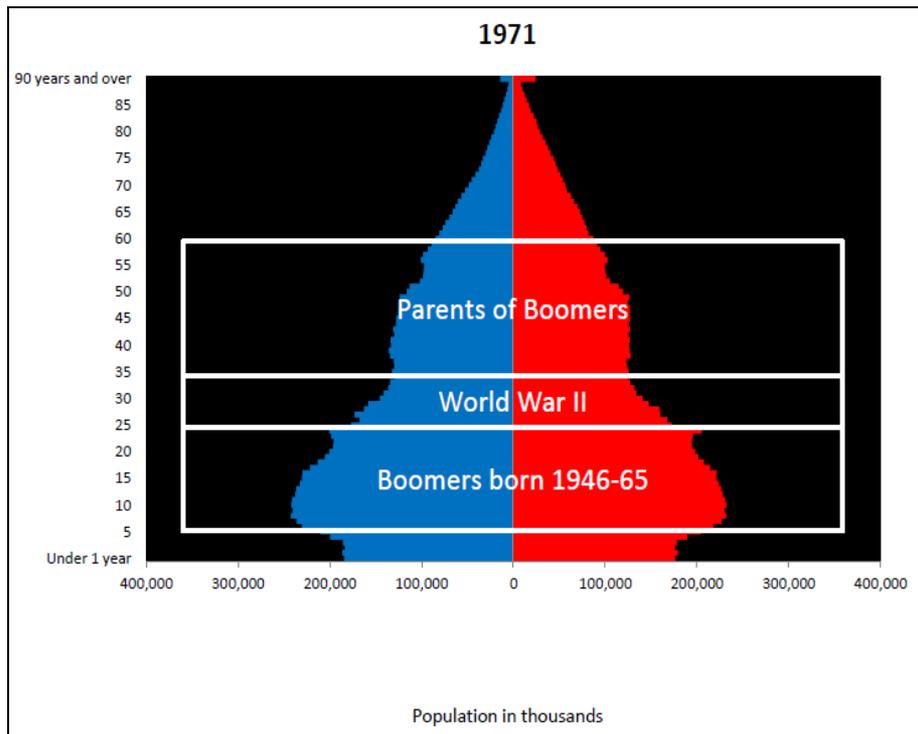
New Canadians*



*Source: Statistics Canada, image courtesy of Environics Analytics

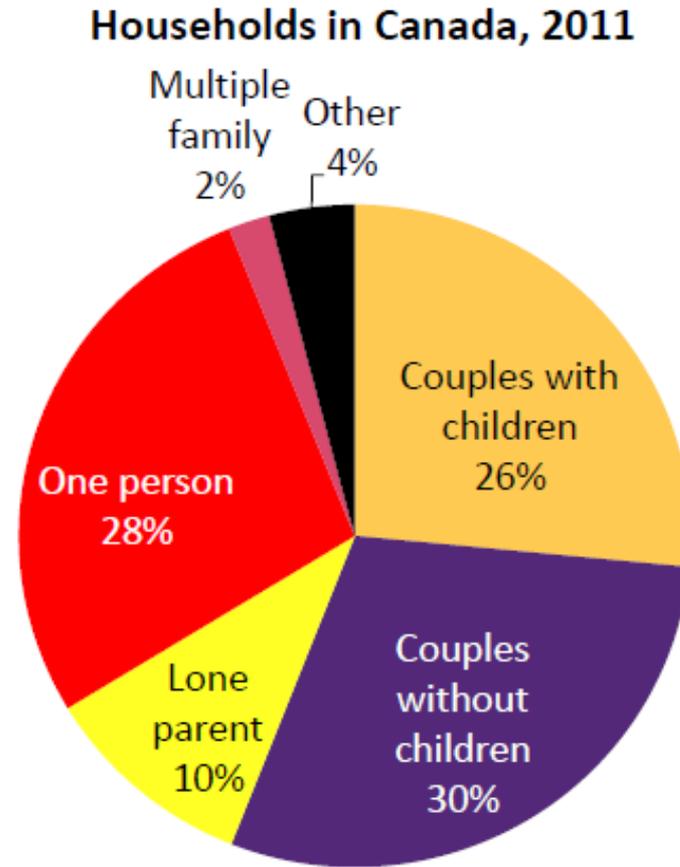
Canada's Evolving Demographic Landscape

The Aging Population*



*Source: Statistics Canada, image courtesy of Environics Analytics

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?



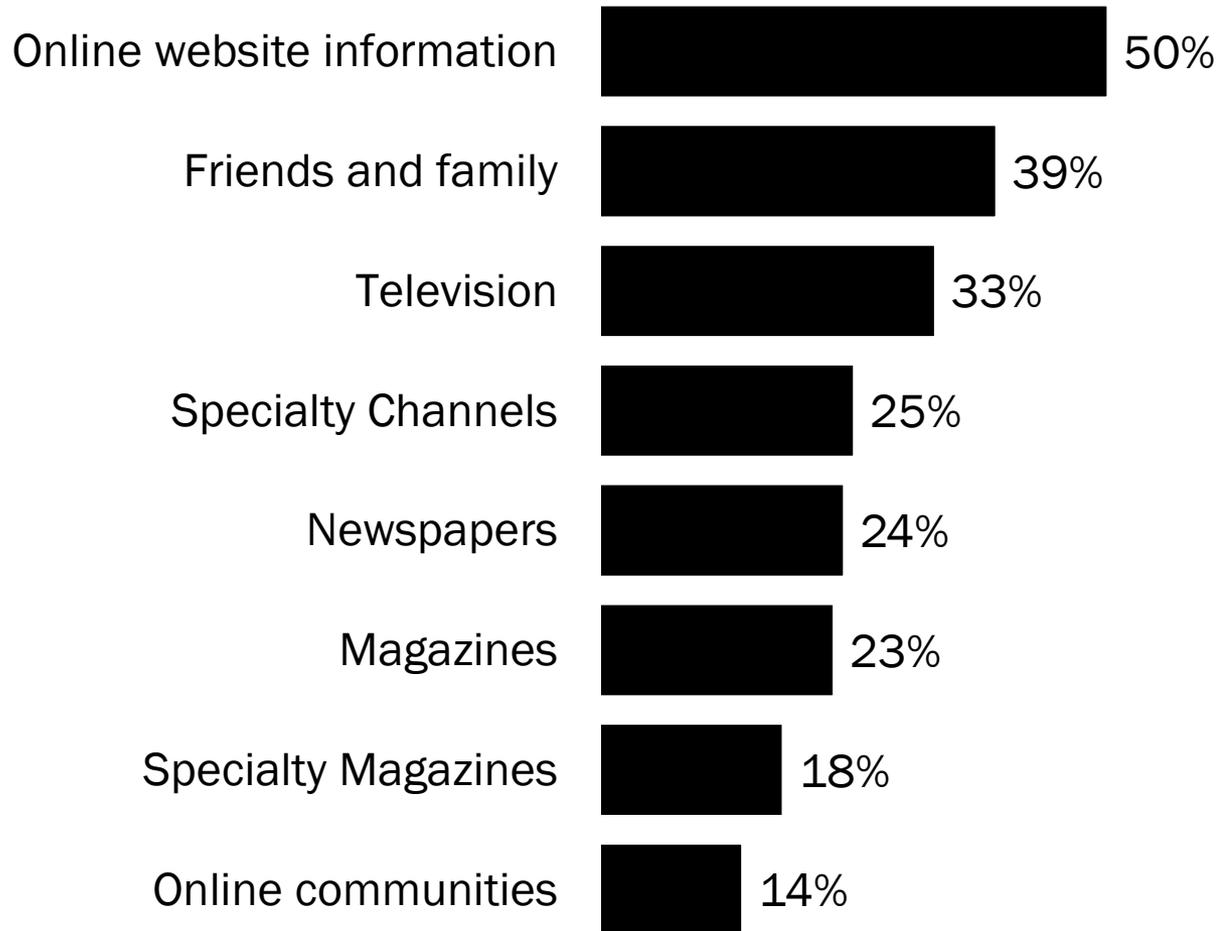
On average, shoppers report:

- 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

facebook



You Tube



Google™

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

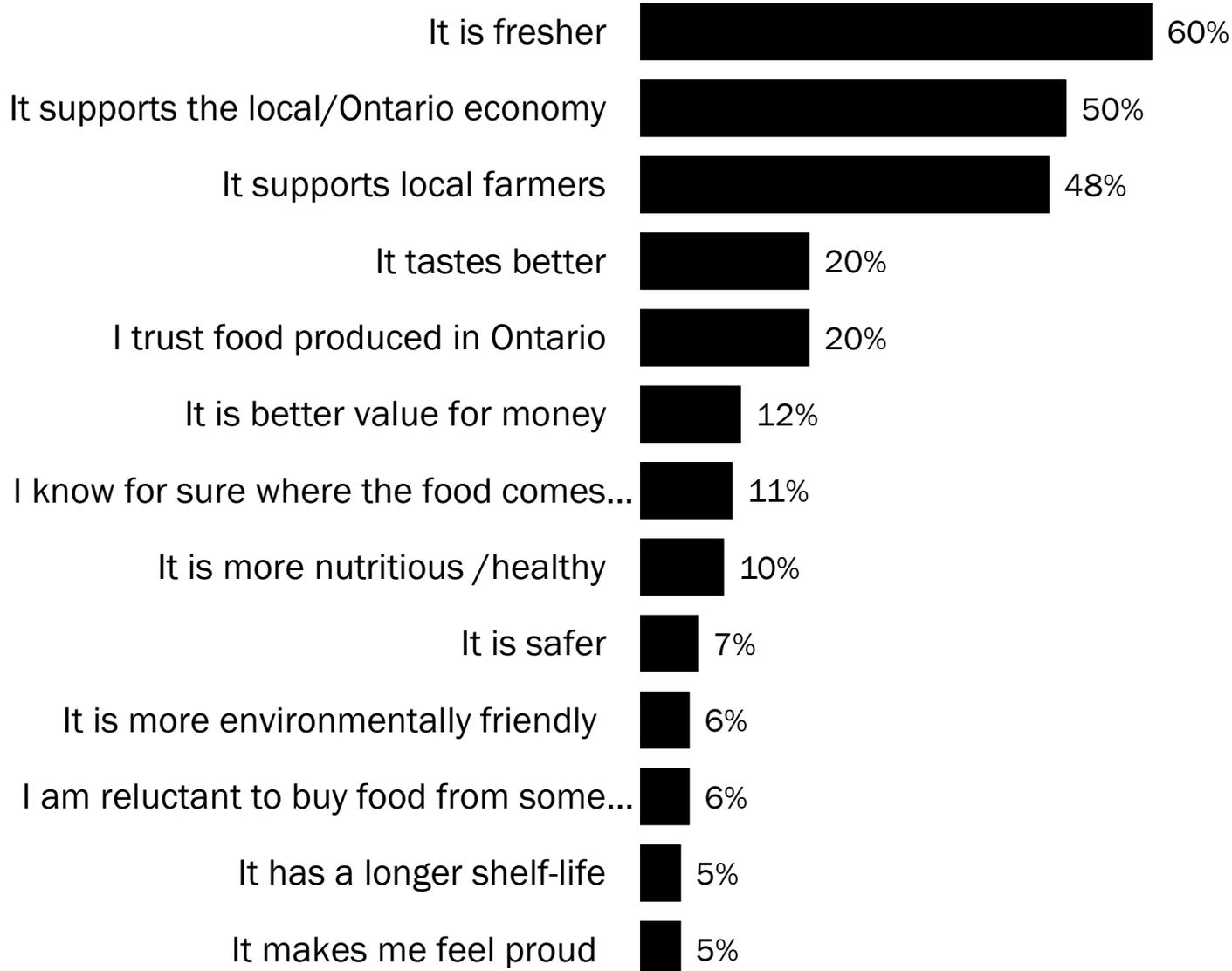
Social Values

- 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

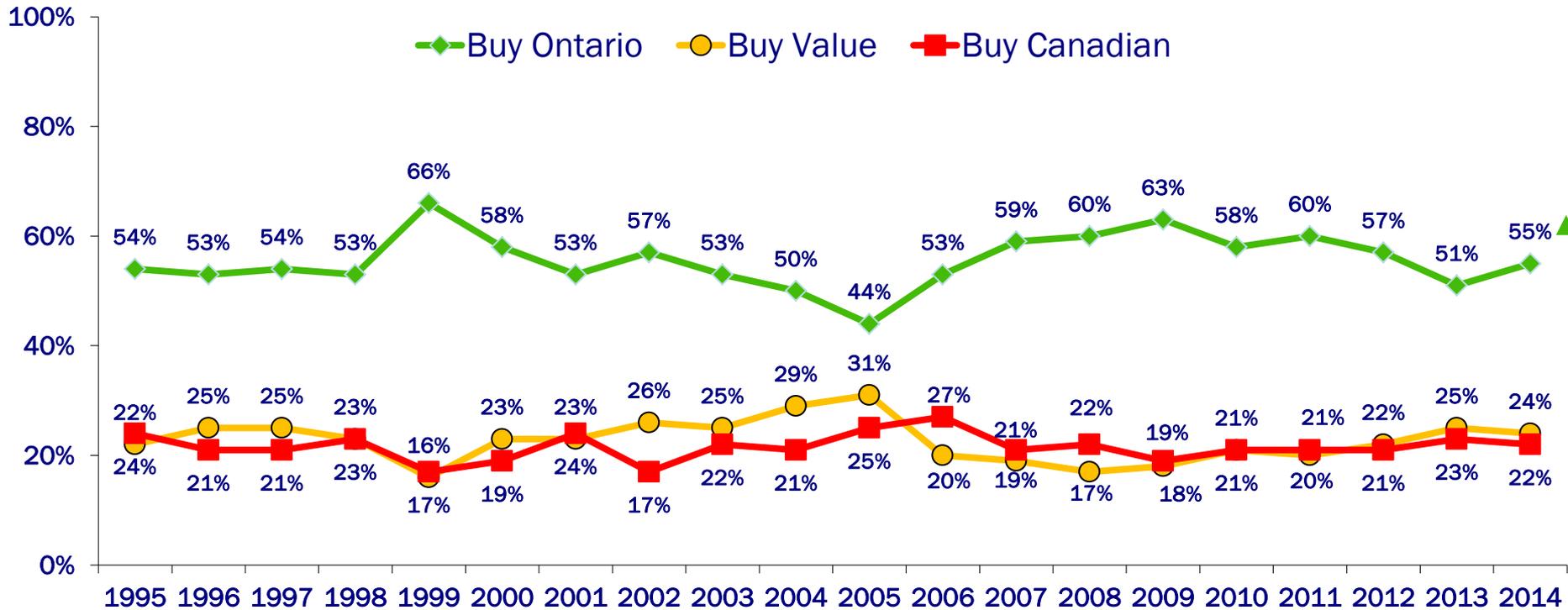
Why is Buying Local Important?



* 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

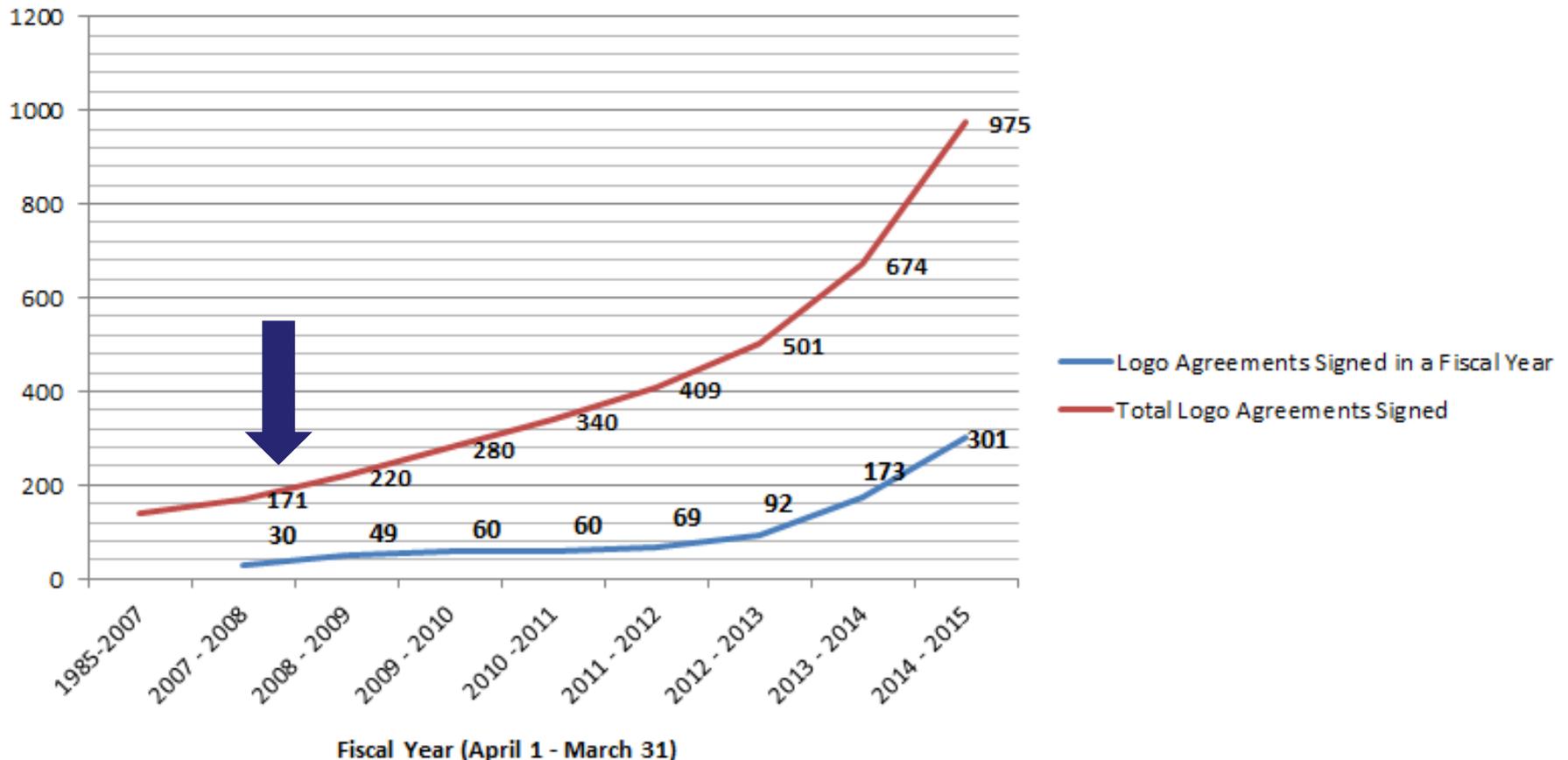
- Showcase the depth, breadth and variety of local food
- Communicate the size and diversity of the Ontario food industry
- Encourage and empower consumers to ask for Ontario food when they don't see it in grocery stores, markets and restaurants

“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
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

1-888-466-2372 ext.63947

3. Sign the Foodland Ontario logo agreement



Thank You

