Foodland Ontario Program: Consumer Food Buying Insight

2023 Ontario Hazelnut Association Symposium

March 2, 2023

Agenda

- **Leveraging Foodland Ontario**
  - Creating Demand
  - Identifying Local
  - Influencing Retail
  - Value Added Collaboration
- **Consumer Insights**
  - Consumer Research
  - Principal Grocery Shoppers

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ONTARIO

Foodland Ontario
Program Overview

Creating Demand for Local

- Advertising (Mass Media)
- Social / Digital Media
- Public Relations
- Public Awareness

Advertising and Social/Digital Media

- TV (English and French)
- Radio
- Print
- Digital
- SEM (search brand key words)
- Social Media (Organic and Paid)

166K followers

27.5K followers

32.4K followers

3.4K followers

Public Relations

- Recipe Development and Photography
- Television Appearances
- Food & Lifestyle Media
- Newsletters
- Recipe Releases
- Print Articles

Fresh Perspectives

Celebrate fresh Ontario flavours Spring 2022

Maple Creme Brulee

Marvellous maple treats

Enjoy one of these sweet treats at brunch or dinner.

Maple Crème Brûlée: This easy-to-make brûlée is even more special with the addition of Ontario maple syrup.

Maple Apple Upside-Down Cake: The maple syrup makes a tasty glaze over the apples in this cake. Serve warm with a scoop of vanilla ice cream.

Maple Fudge: Try this creamy fudge made with Ontario maple syrup. To achieve the right texture, it is best to use a candy thermometer.

Self-Saucing Apple and Spiced Rum Pudding: Sweet apples and maple syrup team-up with spiced rum for a taste of the islands in this easy and delicious warm saucy dessert.

French Toast Breakfast Muffins: Toss cinnamon bread cubes with apples; add eggs, milk, maple syrup and bake.

Fresh Perspectives: Your Media Tool

Use Fresh Perspectives as inspiration for your own stories.

Visit our website at media.foodlandontario.ca and register to download recipes and photography.

Reprint stories by copying and pasting from the pdf.

Credit Foodland Ontario for all recipes and photography downloaded.

Looking for a spokesperson for television or radio? Contact Public Relations Specialist, Joan Fraser at 416-624-1593 or joan.fraser@ontario.ca.

March Break Ideas

Invite the kids into the kitchen this March break. Plan a menu, make a shopping list and shop together.

Don't forget to look for Ontario fresh food when you shop. Make a game of it and ask your children to look for the Foodland Ontario symbol throughout the store.

Some child-friendly options to consider include: Baked Potatoes or Chili topped with Ontario cheese or salsa; Muffins or Cakes featuring apples and carrots; or try Pancakes topped with Ontario maple syrup.

Then it's back to the kitchen for fun. You should supervise all cutting and cooking until children are old enough to do it themselves.

Visit **foodlandontario.ca** for seasonal recipes your kids will love.

Irish Beef and Potato Dinner

St. Patrick's Day

You don't need the luck of the Irish to prepare a tasty meal on St. Paddy's Day. Celebrate with a traditional meal of Irish Stew or try one of these ideas:

A blarney breakfast: Start your day with slices of honey ham, scrambled eggs and Savoury Soda Bread.

A luck o'the Irish lunch: Enjoy a bowl of Corned Beef and Cabbage Soup. Serve with crusty rolls.

A shamrock supper: Savour a plate of Irish Beef and Potato Dinner featuring Ontario potatoes, parsnips, carrots, onions and cabbage.

Fresh Perspectives 01

FOR RELEASE: April 2022
CONTACT: Joan Fraser
joan.fraser@ontario.ca
416-624-1593

Simply Delicious Springtime Dishes

GUELPH, ONTARIO – Spring is the perfect time to make delicious meals featuring Ontario greenhouse vegetables. Your whole family will enjoy these colourful and easy to prepare dishes that work for a casual dinner or spring celebration. When shopping at your local grocery store, farmers' market and on-farm market, think local, shop local and cook with local ingredients.

Chopped Kachumber Salad is a refreshing crisp and tasty Indian-inspired salad that goes well with any grilled local meat, curry or dahl. This salad can also be served with pappadum or grilled naan and enjoyed as an appetizer or snack.

Dig into this glazed baked **Sesame Chicken and Vegetables** for dinner tonight. It will be ready and on the table faster than waiting for takeout to be delivered. You can easily adapt this recipe to your family's preference if some like it hot!

This flavourful main dish **Black Pepper Beef** is popular in Cambodia. Fresh ground black pepper and lime juice accent tender beef slices while local greenhouse lettuce, tomatoes and cucumber add freshness to this quick stir-fry.

A great end to any meal is dessert of course. Our **Apple Yogurt Cake** is delicious, moist and easy to prepare. Serve with a glass of milk or your favourite warm beverage to enjoy anytime of the day.

We are here to help. Ontario has a lot on offer during the spring months. Visit us at **foodlandontario.ca** to find out what's available, and for more quick and easy recipes you can make with food you can find in your fridge, freezer, or pantry.

Whether you are planning a relaxing weekend or need dinner on the table asap, these springtime dishes featuring local food will help you do that.

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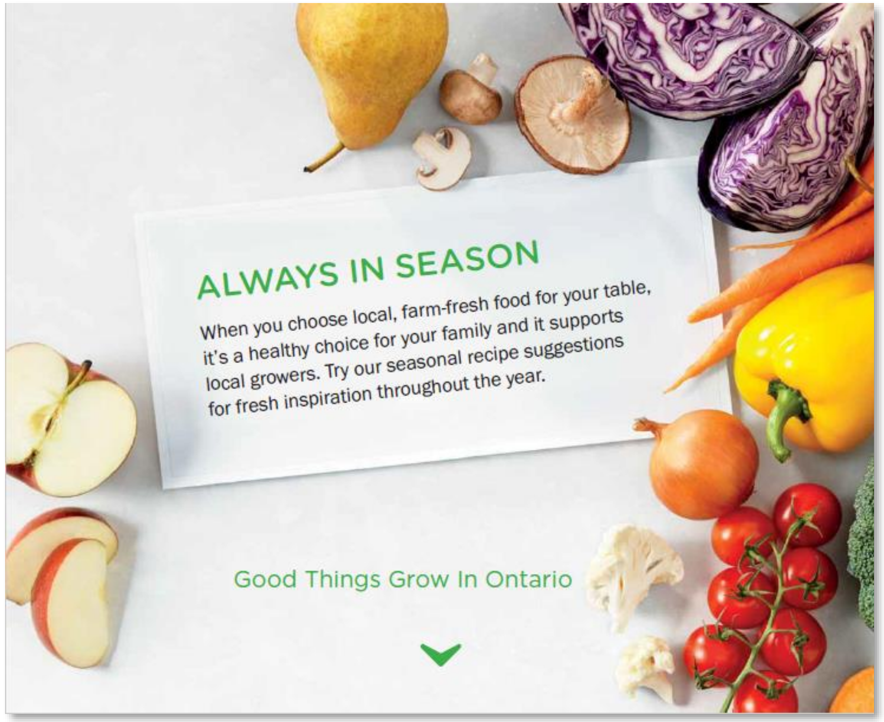
For recipes and photography visit
www.media.foodlandontario.ca

Foodland Ontario Calendar

Approximately **250,000 English copies** and **2,500 French copies** of the Foodland Ontario calendars are distributed annually across the province at grocery retailers, farmers' markets and on-farm markets.



Identifying Local
Logo Use and Food Literacy

Almost 1,800 businesses are using the logo on packaging, labels, or other marketing materials.

Benefits

Almost 90 per cent of Ontarians recognize the logo making it the best way to help customers identify Ontario food.

The strongest driver for consumers to purchase Ontario food is their ability to find that product at shelf. Usage of the logo helps consumers to easily identify and choose the Ontario option when shopping for groceries.

Find out how to use the Foodland Ontario logo at foodlandontario.ca.

Influencing Retail

- Point-of-sale (POS) materials and merchandising resources for vendors:
    - Posters, base wrap, price cards, recipe pads, etc.
    - POS materials can be used at **no cost** for Foodland Ontario partners that have a logo agreement in place

Influencing Retail

- Display Contests & Retailer Awards
- Retailer Recognition
- Food Service
- Broader Public Sector

Value Added Collaboration

- Stakeholder Relations
- Local Food Week
- Agriculture Week
- Healthy Eating

Achievements at a glance

Foodland Ontario Symbol Recognition

Foodland ONTARIO

2015	2016	2017
94%	93%	89%

Propensity to Purchase Ontario Fresh Food

2015	2016	2017
82%	82%	84%

Support for Foodland Ontario Program

2015	2016	2017
83%	83%	81%

50 television appearances

$12M editorial value: print and broadcast

2021-2022

105M consumer impressions from social media

1,727 logo holder agreements, **53** are organic

159 Average logo agreements issued annually since 2014

Foodland ONTARIO

11,000+ face-to-face visits in over **1,200** grocery stores

3.5M point of sale materials placed and distributed

2,600 Schools participated in 2013-2022

$5.7M local food sold

FRESH FROM THE FARM

Ease of Identifying Ontario Foods

Shoppers find it easiest to find Ontario fruit and vegetables in stores (805) followed by Ontario eggs (71%), dairy products (63%) and meats (61%)

Preference to Buy Ontario vs. Canadian

More Ontarians (46%) are reporting they always try to buy local food over imported food compared to 43% in 2019, and 76% agree that now more than ever it is important to buy local

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Consumer Insights

Consumer Shifts in Purchasing

46% of Ontarians reported in 2021 that they always try to buy local over imported food, compared to 43% in 2019.

Consumers have increased need for local food promotion and support for local farmers and food businesses.

Consumer have renewed their focus on their local community and 82% reported shopping is one of the best ways to support province's economy

Consumer Propensity to Purchase Local

- More likely to buy local when they see Foodland Ontario logo.
- Almost 90 per cent of Ontarians recognize the logo.

89%	**Of Ontario's principal grocery shoppers recognize the Foodland Ontario logo**
86%	**Of Ontario's principal grocery shoppers intend to purchase fresh Ontario food**
81%	**Support the Foodland Ontario program**

Foodland Ontario's Usage and Attitudes Awareness Study (2021)

Target Audience

+ ◄ PROPENSITY TO PURCHASE LOCAL ► **−**

18% — Principled Affluent Local-enthusiasts

- Strongest support for local farmers;
- Place more importance on safety, environmentally friendly, concern about pesticides or food additives, ethical production and length of time to market;
- Are more health conscious than they used to be and desire more wholesome eating habits;
- Optimistic, risk-averse, want to make the world a better place and family-centric;
- Most likely to cook meals at home.

12% — Established Patriotic Traditionalists

- Feel a strong responsibility to support local farmers;
- Place more importance on appearance, concern about presence of pesticides or food additives, ethical production, long-shelf life and length of time to market;
- Desire more wholesome eating habits but also feel eating healthy has become too expensive;
- Always try to buy Canadian products;
- Feel the pace of change in life today is too fast, like having a routine and being organized.

13% — Ambitious Health-conscious Urbanites

- Place more importance on healthfulness, safety, concern about presence of pesticides or food additives and organically produced;
- Choice of local or imported food depends on what they are preparing and buying local is more about avoiding the big industrial food producers;
- Staying active is a priority.
- Worry more about food safety than a few years ago;
- Urban, optimistic and tech savvy. Have sacrificed many things to succeed in life.

15% — Receptive Value-driven Consumers

- Buy local, but only if it is the same price or cheaper than imported.
- Would buy more local food if it were the cheaper or fresher option or if it were easier to identify when shopping for groceries;
- Place more importance on freshness, price and healthfulness, while all other factors are less important;
- Feel it's okay to eat junk food sometimes, enjoy trying new and exotic foods and feel having a diverse population is a good thing.
- More likely to get information on food and nutrition online and in newspapers.

28% — On-the-go Convenience-oriented Suburbanites

- Buy local because it is fresher, more nutritious, safer and better value for money;
- Would buy more local if it were the cheaper or fresher option;
- Place more importance on buying local for processed foods;
- Prefer the convenience of takeout, most likely to eat out and rely on online ordering;
- Always on the go and believe that time is money;
- Look to the government for advice on nutrition and healthy eating and more likely to get information through online communities;

15% — Pessimistic Disengaged Frugal Consumers

- Local isn't an important consideration.
- Buy what they need regardless of where it is grown or produced or buy local, but only if it is the same price or cheaper than imported.
- Price is the most important factor and feel local is more expense/ has become too expensive.
- Feel that it`s okay to eat junk food;
- Pessimistic, stick to things they know they like and feel the system doesn`t work for people like them.

Foodland Ontario's Usage and Attitudes Awareness Study (2021)

Factors When Purchasing Fresh Foods

% IMPORTANT – TOP 3 BOX (5-7)	TOTAL	SEGMENT					
		1	2	3	4	5	6
	(n=1251)	(n=248)	(n=156)	(n=160)	(n=206)	(n=300)	(n=181)
Freshness	93%	98%	99%	98%	96%	83%	92%
Price	83%	71%	90%	84%	91%	78%	94%
Healthfulness or nutritional content	83%	95%	93%	97%	80%	75%	70%
Safe or hygienic production	83%	91%	91%	90%	77%	82%	72%
Appearance	76%	78%	87%	72%	72%	70%	80%
Concern about the presence of pesticides or food additives	71%	84%	87%	89%	48%	70%	52%
Locally grown or produced	70%	93%	83%	84%	53%	64%	46%
Environmentally friendly	58%	82%	71%	72%	40%	61%	21%
Long shelf-life	58%	50%	64%	57%	51%	63%	61%
Length of time it takes to get to market	58%	72%	71%	71%	38%	55%	47%
Ethical production	57%	70%	73%	72%	42%	59%	28%
Familiarity of producer or brand name	50%	57%	53%	51%	32%	56%	43%
Organically produced	37%	47%	31%	59%	7%	55%	6%

Q3. Imagine you are shopping for fresh food in your regular grocery store or market. Using the scale below, how important is each of the following factors...
Base: All Respondents 2021(n=1251)

Factors When Purchasing Locally Grown Food – Ontario vs. Imported

% Above Average – TOP 3 BOX (5-7)	Total	Segment					
		1	2	3	4	5	6
	(n=1251)	(n=248)	(n=156)	(n=160)	(n=206)	(n=300)	(n=181)
Freshness	89%	98%	95%	94%	94%	75%	88%
Quality	82%	94%	90%	85%	80%	75%	75%
Healthful	74%	87%	78%	77%	64%	71%	65%
Length of time it takes to get to market	72%	86%	81%	69%	68%	65%	70%
Better appearance	69%	83%	73%	72%	61%	65%	64%
Safe or hygienic production	69%	84%	73%	71%	63%	65%	57%
Environmentally friendly	64%	79%	74%	66%	56%	63%	47%
Long self-life	59%	73%	65%	66%	45%	57%	48%
Ethical production	58%	78%	70%	58%	44%	57%	40%
Affordable	54%	66%	48%	60%	44%	63%	33%
Organic	48%	66%	45%	61%	30%	55%	26%
Presence of pesticides or food additives	45%	51%	48%	41%	35%	56%	25%

Q6. How would you rate Ontario grown and produced food compared to average food imported from other places on each of these factors? Would you say Ontario grown and produced food is above average, about average or below average on...
Base: All respondents 2021 (n=1251)

Propensity to Purchase Ontario Grown Food in the Future

% Important – TOP 3 BOX (5-7)	Total	Segment					
		1	2	3	4	5	6
	(n=1251)	(n=248)	(n=156)	(n=160)	(n=206)	(n=300)	(n=181)
Likely (Top 3 Box, 5-7)	86%	100%	94%	95%	86%	76%	76%
Neither (Mid Box, 4)	10%	-	6%	5%	11%	19%	15%
Not likely (Low 3 Box, 1-3)	3%	-	1%	-	3%	5%	9%

Q7. How likely are you to specifically try to buy the Ontario grown or produced food option in the future?
Base: All respondents 2021 (n=1251)

Local Loyalty

	Total	Segment					
		1	2	3	4	5	6
	(n=1251)	(n=248)	(n=156)	(n=160)	(n=206)	(n=300)	(n=181)
Given a choice I always try to buy locally grown and produced food over imported food.	47%	83%	53%	52%	27%	44%	17%
I prefer to buy locally grown and produced food, but only if it is the same price or cheaper than imported.	41%	15%	41%	38%	57%	40%	58%
I just buy what I need regardless of where it is grown or produced.	13%	2%	6%	9%	16%	16%	25%

Q11. Please indicate which of the following comes closest to your own view.
Base: All Respondents 2021 (n=1251)

Consumer Research Insights

Why Buying Local is Important	• It supports local farmers • It supports the local economy • It is fresher	• My friends prefer to buy local • It is hygienically produced • There is more variety
Factors motiving purchase of Ontario vs. Imported	• Fresh • Quality • Healthful	• Affordable • Organic • Presence of pesticides or additives
Reasons for lack of purchase intent	• Price/cost/buy what is cheaper • Availability in grocery store	• Depends on freshness • Seasonal availability
Impact on purchase intent	• If it were the cheaper option • If it were fresher • If I knew it was benefitting a local farmer	• If it was easier to identify in restaurants • If it was easier to identify when buying online groceries • If I knew the farm it was produced at

Foodland Ontario's Usage and Attitudes Awareness Study (2021)

Consumer Research Insights

Attitudes toward Fresh Local Food	• Because it's locally grown it's fresher • Respect for local farmers • Benefits the economy • I notice it more in stores	• I prefer takeout • I prefer to buy Organic • Reduce environmental impact
Eating Habits	• Eat together as a family • It's about time we got back to more wholesome eating • I prepare meals ahead of time to save time in the evenings	• Sometimes I eat take out during the day because I know I will eat a nutritious dinner • Concern about eating fast food is overrated • There isn't a convenient place nearby to buy local food

Types of Grocery Stores Frequented

Mean Number of trips per month	Total	Segment					
		1	2	3	4	5	6
	(n=1251)	(n=248)	(n=156)	(n=160)	(n=206)	(n=300)	(n=181)
Large Chain Grocery Stores	4.9	6	5.6	2.8	2.9	6.7	3.7
Discount Grocery Stores	4.4	3.8	5.6	5.4	3.4	4.5	4.1
Warehouse club stores	2.2	1.1	1.5	1.2	0.7	5.3	0.8
Mass merchandisers or discount department stores	1.9	1.7	2.5	1.9	1.9	2.1	1.5
Independent Grocery Stores	1	0.8	0.6	1.1	0.5	1.8	0.3
Farmers` markets or directly from a farm/ farmer / producer	1	1.6	1.4	0.7	0.6	1.3	0.3
Ethnic grocery stores	0.8	0.4	0.3	1.3	0.5	1.6	0.3
Online grocery retailers	0.7	0.4	0.5	0.7	0.2	1.4	0.2
Online recipe meal-box retailers	0.3	0.2	*	0.2	0.2	0.7	*

Q14. Approximately how many times in a typical month do you shop for groceries at each of the following food retail locations?
Base: All respondents 2021 (n=1251)

Preferred Grocery Store

	Total	Segment					
		1	2	3	4	5	6
	(n=1251)	(n=248)	(n=156)	(n=160)	(n=206)	(n=300)	(n=181)
No Frills	21%	17%	25%	20%	18%	22%	25%
Walmart Supercentre	11%	5%	8%	3%	12%	16%	13%
Food Basics	10%	10%	14%	9%	13%	7%	13%
Real Canadian Superstore	9%	13%	12%	5%	10%	6%	10%
Costco	9%	6%	6%	13%	6%	15%	3%
Loblaws	6%	5%	5%	11%	9%	5%	5%
Metro	6%	9%	3%	8%	5%	6%	2%
FreshCO	6%	4%	5%	8%	6%	6%	5%
Sobeys	4%	6%	7%	1%	4%	2%	3%
Zehrs	3%	5%	2%	3%	5%	2%	4%
Your Independent Grocer	3%	3%	4%	3%	2%	2%	3%
Fortinos	2%	4%	1%	-	2%	1%	1%

Q16. At which of the following food retail locations do you do the majority of your grocery shopping? Please select only one.
Base: All respondents 2021 (n=1251)

Percentage of Meals Cooked at Home vs. Eaten Out

Mean %	Total	Segment					
		1	2	3	4	5	6
	(n=1251)	(n=248)	(n=156)	(n=160)	(n=206)	(n=300)	(n=181)
Meals cooked at home	86%	92%	91%	89%	87%	78%	86%
Meals eating out or take out	14%	8%	9%	11%	13%	22%	14%

Q24. In an average week, how often do you cook your own meals versus eating out or buying take out?
Base: All respondents 2021 (n=1251)

CONTACT

For inquiries, please contact:

Gigi Coronil, Client Services Officer
georgimar.coronil@ontario.ca
(226) 962-6653

Barb Smith, Retail Services Supervisor
barb.smith@ontario.ca
(519) 835-5840

THANK YOU!