FOODLAND ONTARIO 2023 ADVERTISING & AWARENESS TRACKING STUDY

FINAL REPORT

2023-08-02

Research Objectives

- Measure and track consumer attitudes towards Ontario food and the Foodland Ontario program and recall of the Foodland Ontario advertising campaign and promotional materials. Key areas of investigation include measuring:
  - Recognition of the Foodland Ontario symbol compared to other competitive symbols and logos and understanding of the Foodland Ontario symbol's purpose;
  - Awareness and recall of media advertising, in-store merchandising and promotions in support of the Foodland Ontario Program;
  - Basic attitudes and beliefs regarding Ontario grown or produced foods;
  - Propensity to buy fresh Ontario food and measures of usage and loyalty;
  - Awareness of and ease of identifying foods outside of the traditional Ontario Foodland produce category; and,
  - Consumer support for the Foodland Ontario Program.
- Measure the impact of the campaign on attitudes toward and likelihood to buy fresh Ontario food among principal grocery shoppers and the campaigns target consumer segments*.

Note: the advertising materials assessed in this study were in-market for the TV campaign between Mar 7 - 27, 2022, while the Radio and Paid Social campaign were in-market more recently and ended March 2023.

*Segmentation analysis was conducted as part of the 2021 Usage & Attitudes Study.

What Are Our Segments?

+ 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.

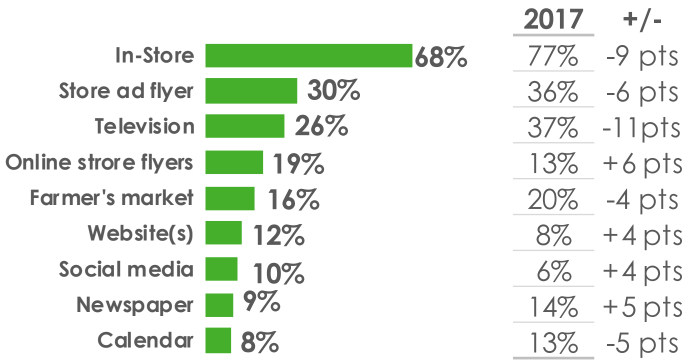
More information on consumer segments are included in the section "Segmentation overview".

Key Performance Indicators

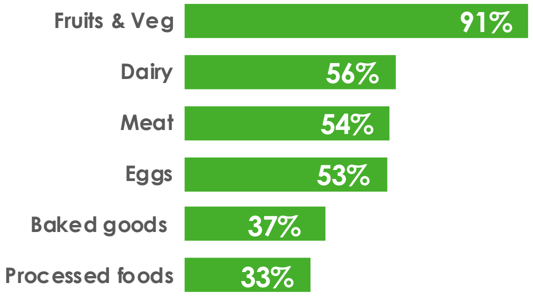
Decline in symbol recognition overall and most notably on television and in-store, while store flyers and social media more prominent sources. Near universal association of the symbol with Ontario produce, while most also associate it with dairy, meat and eggs. Propensity to purchase local and support for Foodland program remains strong but has softened and sensitivity to price versus imported food represents a prominent factor in decision to purchase local.

FOODLAND ONTARIO SYMBOL RECOGNITION

SYMBOL RECOGNITION FROM...



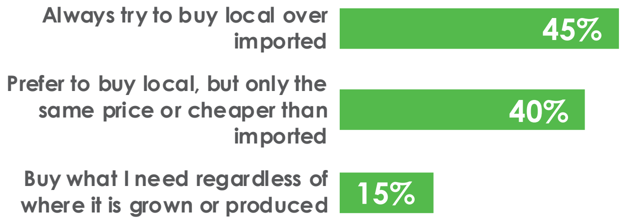
SYMBOL ASSOCIATION WITH ONTARIO...



PROPENSITY TO PURCHASE ONTARIO FOOD

SUPPORT FOR FOODLAND ONTARIO PROGRAM

PREFERENCE TO BUY LOCAL



Advertising and Message Recall

Aggregate campaign recall is consistent with 2017 and notably higher among those most predisposed to buying local and one of the target consumer segments. Claimed recall of advertising about Ontario food in general has increased driven by higher recall of advertising about Ontario baked good, dairy products, eggs and meat.

AGGREGATE CAMPAIGN RECALL

- Over eight in ten (82%) shoppers have seen or heard at least one of the campaign elements, unchanged from 2017 (83%).
- Recall is highest among the segment of consumers most predisposed to buying local (Principled Affluent Local-enthusiasts) and is also notably higher among On-the-go Convenience-oriented Suburbanites (one of the two target segments). Pessimistic Disengaged Frugal Consumers have the lowest recall followed by Receptive Value-driven Consumers (the other target segment), however the vast majority of both recall elements of the campaign.
- Two-thirds (66%) of shoppers claim to recall advertising about 'Ontario foods', higher than 2017 (+9 pts). Shoppers are most likely to recall advertising about dairy products (48%), followed by fresh fruits and vegetables (43%), eggs (40%), meat (37%), maple syrup and honey (27%), baked goods (22%) and prepared or semi-processed foods (17%). Compared to 2017, recall has increased for advertising about baked goods (+11 pts), dairy products (+10 pts), eggs (+9 pts) and meat (+9 pts).

Purchase Preference and Attitudes Towards Ontario Foods

Most prefer to buy Ontario over imported, although nearly the same proportion identify price as a key factor in their decision to purchase.

Attitudes towards Ontario food have improved and shoppers have more positive impressions of the freshness, quality and impact on the local economy.

PREFERENCE TO BUY LOCAL

- At more than four in ten (45%), shoppers are most likely to prefer to buy locally grown food over imported food, while slightly fewer (40%) prefer to buy local food but only if it is the same price or cheaper than imported and just over one in ten (15%) buy what they need regardless of where it is grown or produced.

ATTITUDES TOWARDS ONTARIO FOOD

- Shoppers are most likely to agree that 'buying Ontario food helps our local economy' (69%) followed by 'I have a great deal of respect for local farmers and those who work in agriculture' (66%), 'because Ontario food is locally grown, it is fresher than imported produce' (61%) and 'I can trust the food that is produced in Ontario' (61%).
- Compared to 2017, shoppers are more likely to agree to all statements that were asked at the time of which the largest shifts have been for 'Ontario grown produce is the freshest available' (+21 pts), 'because Ontario food is locally grown, it is fresher than imported produce' (+16 pts), 'when I buy Ontario food, I can count on getting the taste and quality I want' (+16 pts) and 'buying Ontario food helps our local economy' (+15 pts).

Factors in Purchase Decisions and Ease of Identifying Ontario Foods

Freshness remains most important to shoppers, while price has taken on much greater role in purchase decisions than in the past.

Ease of identifying Ontario foods in-store has improved for most types of food. Those who shop for groceries online generally find it more difficult to identify Ontario foods.

FACTORS IMPORTANT IN PURCHASING FOOD

- Freshness (85% rated 8, 9 or 10 on 10 pt. scale, +5 pts) remains the most important factor when purchasing food, followed closely by value (81%) and price (81%, +13 pts), while six in ten (59%, +8 pts) place a high-degree of importance on locally grown or produced. Compared to 2017, shoppers place more importance on virtually all factors with the most notable increases for price (+13 pts, 81%), long shelf-life (+15 pts, 55%) and familiarity of producer or brand name (+15 pts, 47%).

EASE OF IDENTIFYING ONTARIO FOODS

- In-store shoppers find it easiest to identify Ontario eggs (74% very easy/ easy), fruits and vegetables (73%) and dairy products (73%) in grocery stores, followed by maple syrup and honey (68%) and meat (65%). Fewer find it easy to identify Ontario baked good (55%) or processed foods (46%). Compared to 2017, ease of identifying Ontario foods has increased for dairy products (+10 pts), baked good (+9 pts) and meat (+4 pts) and declined for fruits and vegetables (-7 pts).
- Online shoppers find it easiest to identify Ontario dairy products (65%), followed by eggs (62%), fruit and vegetables (60%), meat (60%) and maple syrup and honey (60%). Fewer find it easy to identify Ontario baked goods (56%) or processed/ frozen/ packaged food (53%) when shopping online.

Shopping Behaviour

Most shop for groceries in-store and report spending more on food-related purchases than last year.

More than half purchase local on a weekly basis. Most are buying the same amount as a year ago, while one-quarter are buying more which is notably highest among one of target consumer segments.

IN-STORE VS. ONLINE SHOPPING

- At more than eight in ten (84%), the vast majority of shoppers make their grocery purchases in store, while fewer than one in ten either order online for delivery (9%) or do in-store pickup (7%). On-the-go Convenience-oriented Suburbanites are more likely to purchase groceries online (either for home delivery or pickup) compared to all other segments.

SPENDING ON FOOD-RELATED EXPENSES

- On average, consumers report spending $559 on food-related groceries per month and the vast majority (71%) say they are spending more on spending towards food-related groceries than a year ago (34% much more and 37% somewhat more).

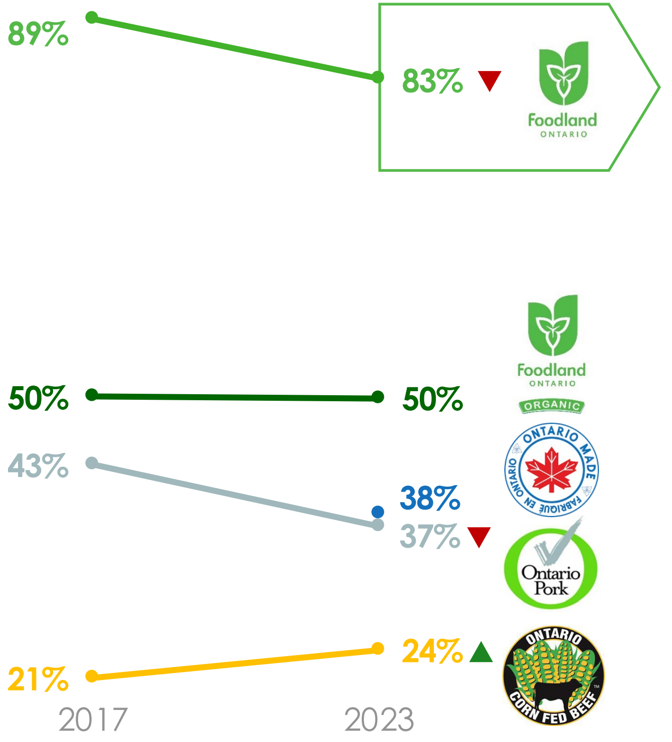
PURCHASE FREQUENCY OF ONTARIO FOOD

- More than half (56%) of shoppers report they purchase Ontario grown and produced food at least once a week (36% once a week, 15% 2-3 times a week and 4% 3+ times a week) and most (64%) say they are purchasing about the same amount as they did a year ago (64%), while just over one quarter (27%) are purchasing more and one in ten (9%) less.
- Principled Affluent Local-enthusiasts are by far most likely to say they purchase local food most often. On-the-go Convenience-oriented Suburbanites and Principled Affluent Local-enthusiasts are more likely to say they are purchasing more Ontario food than last year.

Foodland Ontario Symbol Recognition

Eight in ten (83%) primary grocery shoppers recognize the Foodland Ontario symbol, statistically lower than in 2017 (89%). Half (50%) are aware of the Foodland Organic logo, nearly four in ten the Ontario Made (38%) or the Ontario Pork logo (37%), while one quarter know of the Ontario Corn Fed Beef logo (24%). Compared to 2017, recall has increased for the Ontario Corn Fed Beef logo (+ 3 pts) and has declined for the Foodland Ontario symbol (-6 pts) and the Ontario Pork logo (-6 pts).

Awareness of the Foodland Ontario symbol is consistent among all consumer segments except for On-the-go Convenience-oriented Suburbanites who are less likely to be aware of the symbol.



% Foodland Ontario Symbol Recognition by segment

			TARGETS		
Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
92%	92%	89%	92%	72%	86%

Q1. Please tell me whether or not you recognize the following symbols.
Base: All Respondents 2023 (n=1500); 2017 (n=1478)

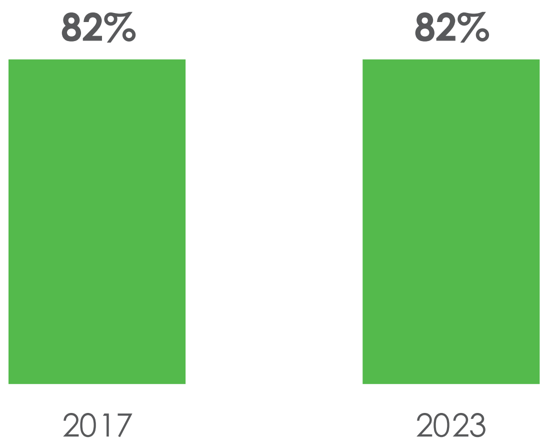
▲▼ Indicates statistical significance vs. 2017

Aggregated Prompted Recall of Campaign

Overall campaign remains consistent with 2017 and over eight in ten (82%) shoppers have seen or heard at least one of the campaign elements.

Recall is highest among the segment of consumers most predisposed to buying local (Principled Affluent Local-enthusiasts) and is also notably higher among On-the-go Convenience-oriented Suburbanites (one of the two target segments). Pessimistic Disengaged Frugal Consumers have the lowest recall followed by Receptive Value-driven Consumers (the other target segment), however the vast majority of both recall elements of the campaign.

% Recall of Any Campaign Element



				TARGETS		
	Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
2023	**94%**	**78%**	**83%**	**75%**	**86%**	**68%**

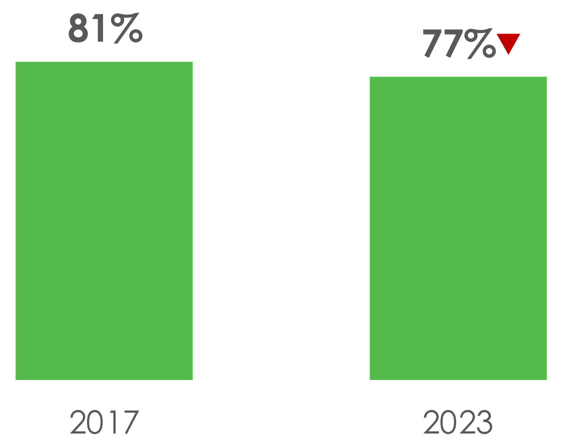
C

OVERALL PROGRAM SUPPORT

Program Support

- At more than three-quarters (77%), the vast majority of Ontarians continue to feel the Foodland Ontario program is a worthwhile effort on the part of the government, although fewer are supportive than in 2017.
- Principled Affluent Local-enthusiasts are most likely to support the program, while Pessimistic Disengaged Frugal Consumers are least likely.

% Program Support



			TARGETS		
Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
97%	84%	82%	82%	72%	61%

Q35. This symbol shown is made available by the Ministry of Agriculture, Food and Rural Affairs to people who grow or produce Ontario foods in the province. This is just one part of a program of the Ontario government designed to encourage people to buy Ontario grown or produced foods. Do you consider this overall program to be a worthwhile effort on the part of the government?
Base: All respondents 2023 (n=1500); 2017 (n=1478)

Foodland Ontario symbol support

- Four in ten (42%) shoppers support the use of the Foodland Ontario symbol for processed foods that are 100% produced in Ontario but contain some ingredients sourced from outside of the province. At nearly half (49%), the largest proportion of shoppers have a more neutral opinion while one in ten (9%) are opposed.
- On-the-go Convenience-oriented Suburbanites (52%) and Principled Affluent Local-enthusiasts (50%) shoppers are the most supportive of the use of the Foodland Ontario logo for processed foods with some ingredients sourced from outside of Ontario.

	TOTAL	Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	TARGETS: Receptive Value-driven Consumers	TARGETS: On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
Support %	42%	50%	35%	35%	31%	52%	25%

Q36. Currently, the Foodland Ontario symbol can only be placed on foods that are 100% grown and produced in Ontario. How much would you support or oppose the use of the Foodland Ontario symbol for processed foods that are 100% produced in Ontario but contain some ingredients, that cannot be grown in Ontario, sourced from outside of the province? (i.e. products with a majority of ingredients grown in Ontario but contain chocolate, lemon, orange, etc.)
Base: All respondents 2023 (n=1500)

▲▼ Indicates statistical significance vs. 2017

Outside ingredients in 'Made in Ontario' products

- At three in ten (30%), consumers are most likely to say it is acceptable that up to 10% of the ingredients of a product may come from outside Ontario for it still to be considered a 'made in Ontario' food product. Two in ten (19%) feel 11% to 20% of ingredients may come from outside Ontario and roughly one in ten (12%) 21% to 30%, while one-quarter (24%) say it cannot contain any ingredients from outside of Ontario.
- Established Patriotic Traditionalists are more likely to feel that the product cannot contain any ingredients from outside of the province to be considered 'made in Ontario', while On-the-go Convenience-oriented Suburbanites are more likely to feel it is acceptable for the product to contain a higher percentage of ingredients from outside the province (specifically 21% or higher).

					TARGETS		
	TOTAL	Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
0%, Cannot contain any ingredients from outside Ontario	24%	29%	39%	31%	21%	13%	31%
1% to 10% of ingredients can come from outside Ontario	30%	44%	37%	34%	44%	17%	36%
11% to 20% of ingredients can come from outside Ontario	19%	17%	15%	17%	17%	22%	19%
21% to 30% of ingredients can come from outside Ontario	12%	4%	4%	11%	8%	19%	6%
31% to 40% of ingredients can come from outside Ontario	7%	1%	1%	3%	3%	14%	3%
41% to 50% of ingredients can come from outside Ontario	4%	4%	1%	1%	6%	7%	2%
More than 50% of ingredients can come from outside Ontario	5%	1%	4%	5%	1%	9%	3%

Q37. Assuming a food product is 100% produced in Ontario, what percentage of ingredients do you feel would be acceptable to source from outside of the province for you to still consider it 'made in Ontario'?
Base: All Respondents 2023 (n=1500)

D

ATTITUDES AND BEHAVIOURS

Preference to Buy Local

At more than four in ten (45%), shoppers are most likely to prefer to buy locally grown food over imported food, while slightly fewer (40%) prefer to buy local food but only if it is the same price or cheaper than imported and just over one in ten (15%) buy what they need regardless of where it is grown or produced.

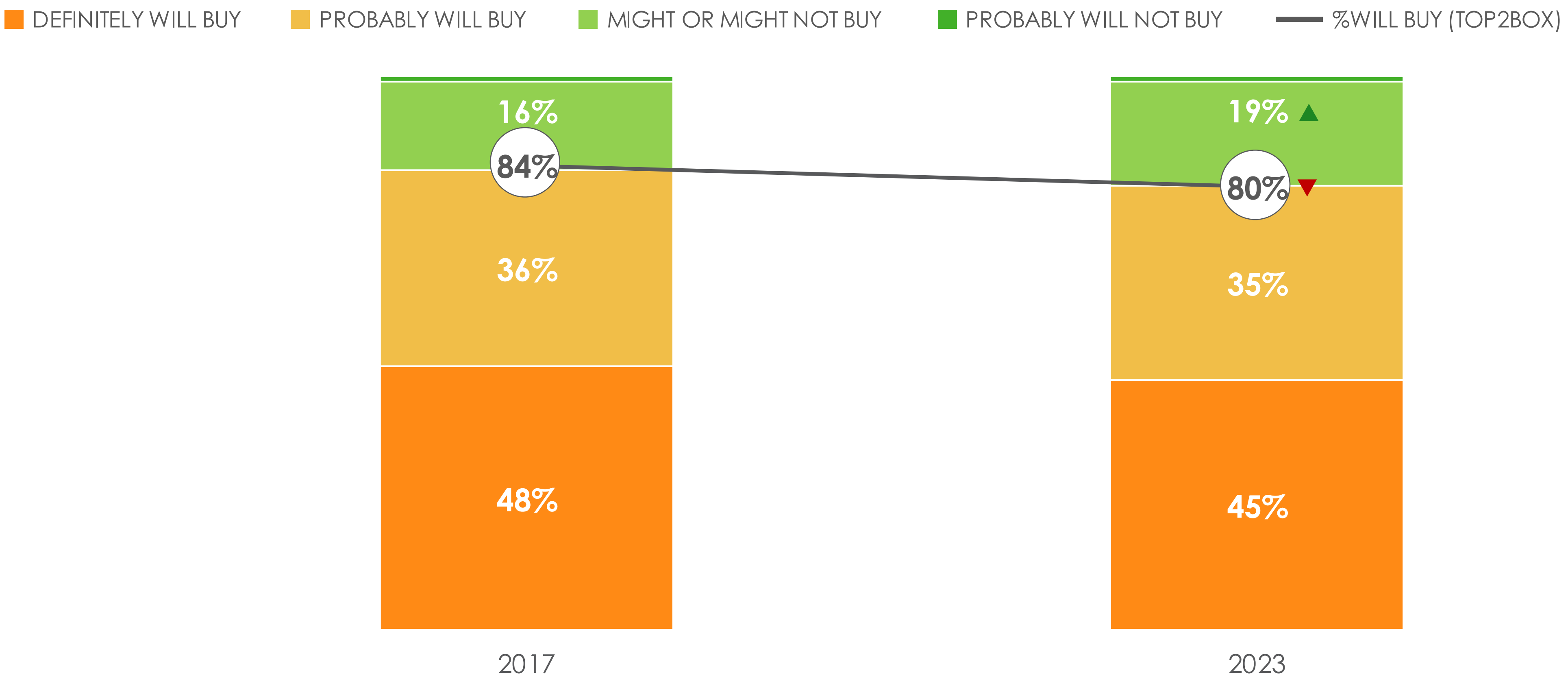
Principled Affluent Local-enthusiasts are most likely to say they prefer to buy locally grown food over imported food, followed by Established Patriotic Traditionalists, On-the-go Convenience-oriented Suburbanites and Ambitious Health-conscious Urbanites. Receptive Value-driven Consumers and Pessimistic Disengaged Frugal Consumers are more likely to prefer to buy local but only if it is the same price or cheaper than imported or to buy what they need regardless of where it is grown or produced.

	Total	Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
Given a choice I always try to buy locally grown and produced food over imported food	45%	71%	55%	43%	23%	50%	18%
I prefer to buy locally grown and produced food, but only if it is the same price or cheaper than imported	40%	25%	37%	47%	53%	36%	48%
I just buy what I need regardless of where it is grown or produced	15%	4%	8%	9%	24%	14%	34%

Q4. Which of the following three statements best describes your point of view when it comes to shopping for food? Please read all three statements before you answer.
Base: All respondents 2023 (n=1500)

Propensity to Buy Ontario Food

- At eight in ten (80%), the vast majority of shoppers would definitely or probably purchase Ontario food in the future. Compared to 2017, propensity to purchase Ontario food remains strong but has soften due to a slightly lower proportion of shoppers that 'definitely will buy' and a slightly higher proportion who 'might or might not buy'.



Values under 4% not labeled

Q5. How likely are you to specifically try to buy Ontario grown or produced foods in the future?
Base: Those who recognize Foodland Ontario 2023 (n=1500); 2017 (n=1478)

Indicates statistical significance vs. 2017

Propensity to Buy Ontario Food (Cont.)

- Those who recall Foodland Ontario advertising are significantly more likely to want to buy Ontario fresh food than those who do not.
- Propensity to purchase Ontario fresh food is generally consistent by age, however those under 35 are somewhat less likely to say they 'definitely will buy'.
- Principled Affluent Local-enthusiasts, Established Patriotic Traditionalists and Ambitious Health-conscious Urbanites are significantly more likely to want to buy Ontario fresh food than other segments, while Pessimistic Disengaged Frugal Consumers are by far the least likely.
- Compared to 2017, propensity to purchase is softer among those 55 or older and notably, among both those who recall Foodland Ontario advertising and those who do not.

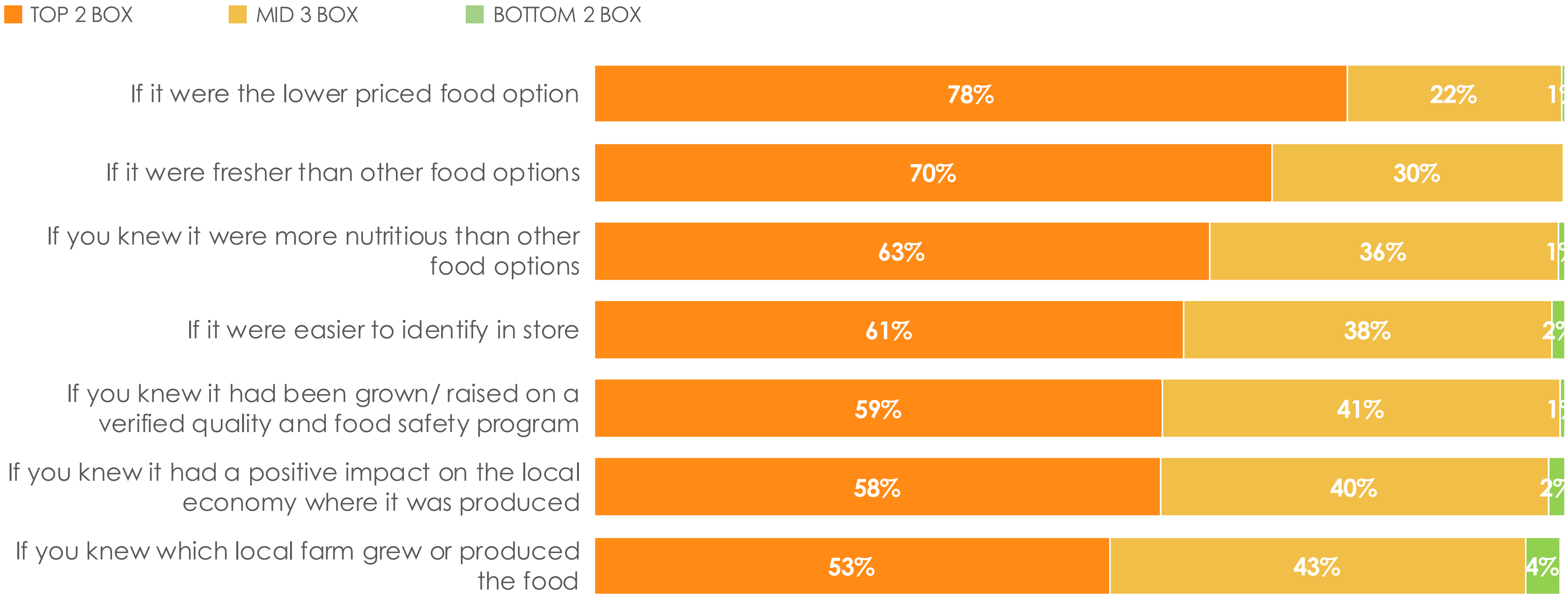
	Total		Age								Foodland Advertising			
	%		< 35		35-44		45-54		55+		Recall		Do not Recall	
	2017	**2023**	2017	**2023**	2017	**2023**	2017	**2023**	2017	**2023**	2017	**2023**	2017	**2023**
Definitely Will Buy	48%	**45%**	45%	**39%**	52%	**49%**	45%	**48%**	49%	**46%**	54%	**48%**	38%	**32%**
Probably Will Buy	36%	**35%**	35%	**42%**	30%	**30%**	40%	**34%**	37%	**33%**	35%	**36%**	36%	**33%**
Top 2 Box	84%	**80%**	80%	**81%**	81%	**79%**	85%	**82%**	86%	**79%**	90%	**84%**	74%	**64%**

	Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
Top 2 Box	**99%**	**90%**	**88%**	**70%**	**80%**	**57%**

Q5. How likely are you to specifically try to buy Ontario grown or produced foods in the future?
Base: Those who recognize Foodland Ontario 2023 (n=1500)

Impact on Likelihood to Purchase Ontario Food

- Almost eight in ten (78%), a strong majority of shoppers would be very likely to buy Ontario grown or produced food if it were 'the cheaper food option', followed by if it were 'the fresher option' (70%). Shoppers remain less motivated knowing which local farm grew or produced the food.
- Compared to 2017, shoppers are more motivated to buy Ontario food 'if it were the cheaper option', 'if it were easier to identify in store' or 'if they knew which local farm grew or produced the food'.



% T2B	2023	2017
If it were the lower priced food option	78% ▲	72%
If it were fresher than other food options	70%	68%
If you knew it were more nutritious than other food options	63%	61%
If it were easier to identify in store	61% ▲	56%
If you knew it had been grown/ raised on a verified quality and food safety program	59%	61%
If you knew it had a positive impact on the local economy where it was produced	58%	59%
If you knew which local farm grew or produced the food	53% ▲	48%

Q9. How likely would you be to buy the Ontario grown or produced food option more often given the following?
Base: All respondents 2023 (n=1500); 2017 (n=1478)

▲▼ Indicates statistical significance vs. 2017

Attitudes Toward Fresh Ontario Foods

- Attitudes toward fresh Ontario foods continue to be consistently higher among those who recall Foodland advertising. Compared to 2017, the level of agreement increased for all statements, particularly among those who recall the campaign.

Top 2 Box % (6, 7 on 7 point scale)	Total %		Foodland Advertising: Recall		Foodland Advertising: Do Not Recall	
	2017	2023	2017	2023	2017	2023
Buying Ontario food helps our local economy	54	69 ▲	59	73	40	53
I have a great deal of respect for local farmers and those who work in the agriculture sector	-	66	-	69	-	54
Because Ontario food is locally grown, it is fresher than imported produce	45	61 ▲	48	64	46	48
I can trust the food that is produced in Ontario	-	61	-	63	-	48
Eating healthy has become too expensive in recent years	-	58	-	60	-	52
The Foodland Ontario logo is a symbol that I trust	38	57 ▲	45	61	30	37
Ontario grown produce is the freshest in the store	36	57 ▲	41	60	29	44
When I buy Ontario food, I can count on getting the taste and quality I want	34	50 ▲	39	54	28	34
Food identified by the Foodland Ontario logo is of the highest quality	-	46	-	50	-	29
I enjoy trying new and exotic foods	-	46	-	49	-	31
Buying locally grown or produced foods has become too expensive in recent years	-	46	-	47	-	40
Buying Ontario food identified by the Foodland Ontario symbol satisfies my preference to buy local	34	45 ▲	41	48	24	30
Local food is typically the more expensive option	-	45	-	46	-	39
It frustrates me when I can't tell for sure where a food item comes from	-	42	-	46	-	27

Q25. Please indicate how much you agree with each of the following statements. Please use a scale from 1 to 7 where 1 means you completely disagree and 7 means you completely agree.
Base: All respondents 2023 (n=1500); 2017 (n=1478)

▲▼ Indicates statistical significance vs. 2017

Attitudes Toward Fresh Ontario Foods (Cont.)

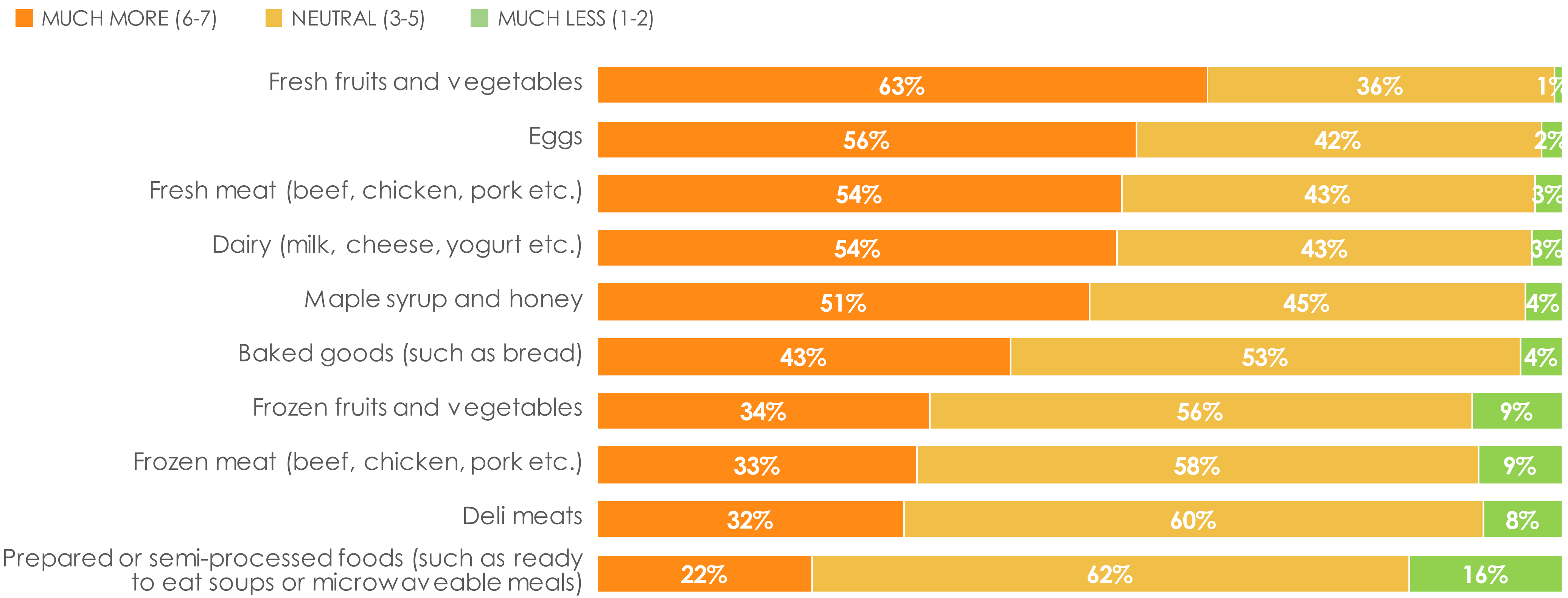
Top 2 Box % (6, 7 on 7 point scale)	Total %		Foodland Advertising Recall		Foodland Advertising Do Not Recall	
	2017	2023	2017	2023	2017	2023
I like to eat ethnic foods from all different places in the world	-	42	-	44	-	32
I think it's okay to eat junk food sometimes	-	41	-	43	-	34
I worry about the safety of the food I eat more now than a few years ago	-	40	-	43	-	30
I feel connected to local farmers	-	37	-	41	-	19
I will buy imported food if it looks better than local food	-	35	-	37	-	26
I prepare meals or ingredients ahead of time to save time in the evenings	-	33	-	36	-	16
I look for the Foodland Ontario logo in store or online when I want to buy local food	23	32	29	37	15	10
Most of the meals prepared for my family are not traditional Canadian meals	-	28	-	31	-	16
I prefer to eat organic produce over other types of produce	-	28▲	-	30	-	15
I prefer the convenience of takeout food compared to cooking for myself	-	23	-	24	-	16
I don't have a convenient place nearby where I can buy local food	-	21	-	22	-	15

Q25. Please indicate how much you agree with each of the following statements. Please use a scale from 1 to 7 where 1 means you completely disagree and 7 means you completely agree.
Base: All respondents 2023 (n=1500); 2017 (n=1478)

▲▼ Indicates statistical significance vs. 2017

Local is More Important When Buying

- Consumers continue to place the greatest importance on local when buying fresh fruit and vegetables, followed eggs, fresh meat and dairy.
- Compared to 2017, consumers place more importance on buying local when purchasing all types of food.



% Much More 2023	% Much More 2017
63% ▲	55%
56% ▲	46%
54% ▲	46%
54% ▲	43%
51%	n/a
43% ▲	34%
34% ▲	23%
33% ▲	26%
32% ▲	24%
22% ▲	17%

Q8. Do you place more or less importance on purchasing locally grown or produced food when you are buying ....
Base: All respondents 2023 (n=1500); 2017 (n=1478)

▲▼ Indicates statistical significance vs. 2017

Importance of Local in Overall Food Purchasing

- Freshness remains the most important factor when purchasing food, followed closely by value and price.
- Compared to 2017, shoppers place more importance on virtually all factors with the most notable increases for price, long shelf-life and familiarity of producer or brand name.

Top 3 Box (score 8, 9, 10 on 10 point scale)	2023	2017
Freshness	**85%** ▲	80%
Value	**81%**	n/a
Price	**81%** ▲	68%
Safe or hygienic production	**74%** ▲	69%
Healthfulness or nutritional content	**70%** ▲	66%
Appearance	**64%**	60%
Wholesomeness (e.g. rich with vitamins/ minerals, etc.)	**62%** ▲	60%
Concern about the presence of pesticides or food additives	**62%**	59%
Locally grown or produced	**59%** ▲	51%
Supporting food producers in my community	**55%**	n/a
Long shelf-life	**55%** ▲	40%
Ethical production (e.g. compassion for animals in production)	**53%** ▲	47%
Environmentally friendly	**52%** ▲	46%
Length of time it takes to get to market	**47%** ▲	42%
Familiarity of producer or brand name	**47%** ▲	32%
Organically grown or produced	**36%** ▲	27%

Q6. Imagine you are shopping for food in your regular grocery store or market (either in-store or online). Using the scale below, how important is each of the following factors.
Base: All respondents 2023 (n=1500); 2017 (n=1478)

▲▼ Indicates statistical significance vs. 2017

Perception of Ontario Versus Imported Food

- Consumers are most likely to rate Ontario grown and produced food above average compared to imported food on 'freshness', 'locally grown or produced' and 'supporting food producers in my community'.
- Compared to 2017, consumers are more likely to rate Ontario food higher in virtually all areas with the most notable increases for long shelf-life and organically grown or produced.

Top 2 Box (score 7, 6, on 7 point scale)	2023	2017
Freshness	**64%**	62%
Locally grown or produced	**61%**	62%
Supporting food producers in my community	**55%**	n/a
Safe or hygienic production	**52%** ▲	48%
Appearance	**52%** ▲	47%
Healthfulness or nutritional content	**50%** ▲	45%
Length of time it takes to get to market	**50%** ▲	52%
Wholesomeness (e.g., rich with vitamins/ minerals, etc.)	**48%** ▲	44%
Value	**45%**	n/a
Environmentally friendly	**44%** ▲	38%
Price	**44%** ▲	32%
Long shelf-life	**42%** ▲	34%
Ethical production (e.g. compassion for animals in production)	**41%** ▲	35%
Organically grown or produced	**41%** ▲	29%
Familiarity of producer or brand name	**40%** ▲	33%
Presence of pesticides or food additives	**33%**	30%

Q7. 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 2023 (n=1500)
*** No historical data due to a change on the scale, from a 10-point scale to a 7-point scale*

▲▼ Indicates statistical significance vs. 2017

E

PURCHASING BEHAVIOUR

Purchasing behaviour

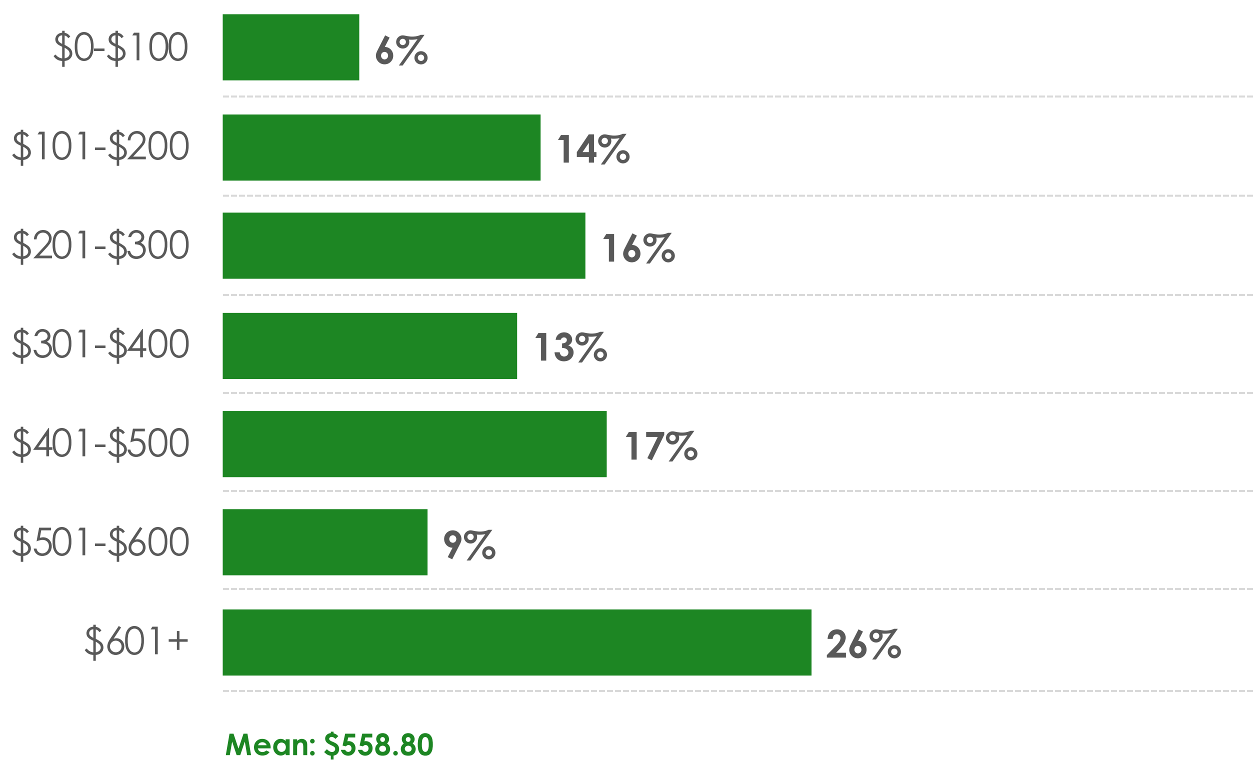
- At more than eight in ten (84%), the vast majority of shoppers make their grocery purchases in store, while fewer than one in ten either order online for delivery (9%) or do in-store pickup (7%).
- On-the-go Convenience-oriented Suburbanites are more likely to purchase groceries online (either for home delivery or pickup) compared to all other segments.

				TARGETS			
	TOTAL	Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
Purchased in-store	84%	90%	89%	89%	93%	75%	90%
Ordered online for home delivery	9%	5%	6%	6%	4%	15%	7%
Ordered online for pickup in-store	7%	5%	5%	5%	3%	11%	3%

Q26. During the past year, approximately what percentage of your groceries in a typical month did you purchase in-store, order online for home delivery or order online for pickup in-store?
Base: All Respondents 2023 (n=1500)

Household Spending on Food Related Groceries

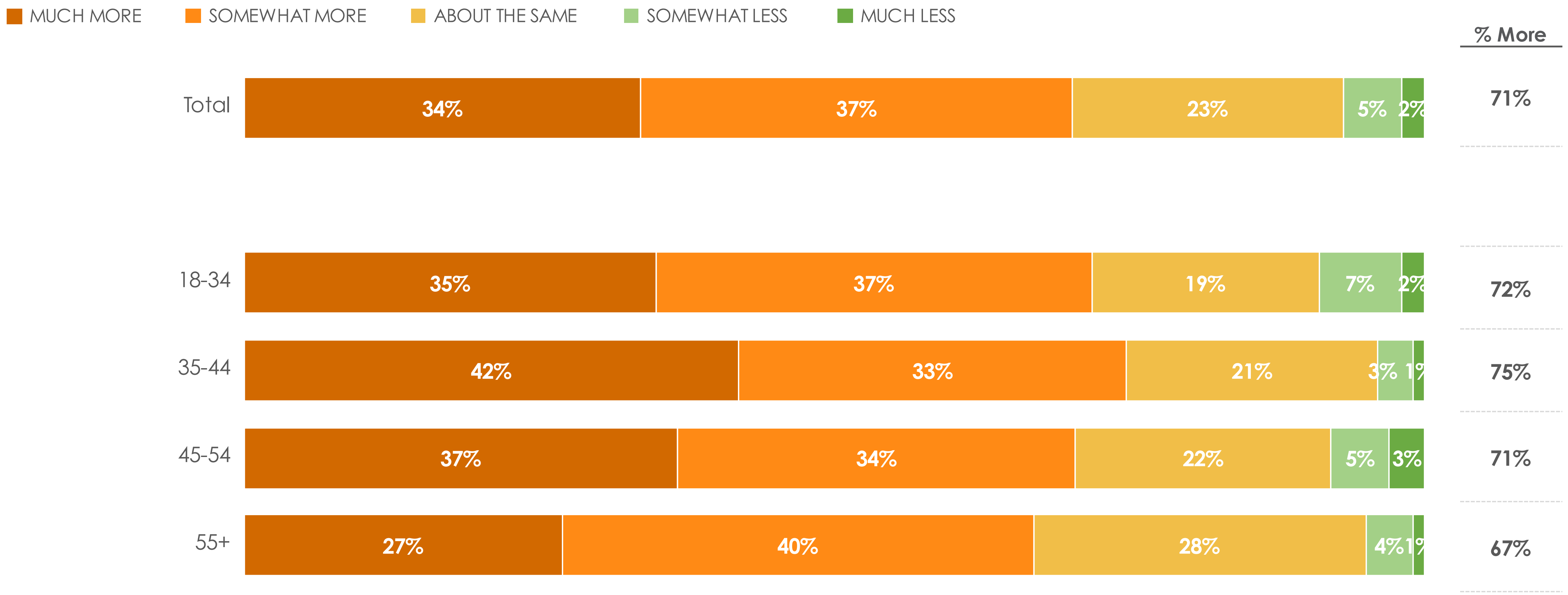
On average, consumers report spending $559 on food-related groceries per month.



Q27. During the past year, how much did your household spend in a typical month on food-related groceries?

Spending on Food Related Groceries compared to a year ago

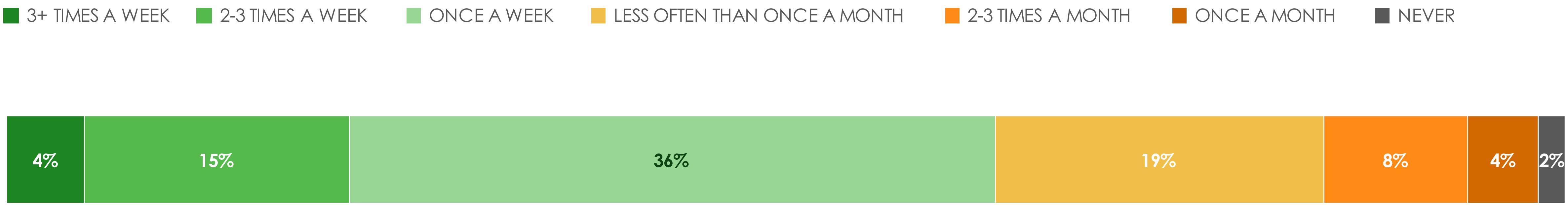
At seven in ten (71%), the vast majority of shoppers say they are spending more on food-related groceries than a year ago (34% much more and 37% somewhat more). Notably, those 55 years of age or older are less likely to say their spending on food-related groceries is much more than a year ago and more likely to say it is about the same.



Q28. Is this more, less or about the same as you were spending on food-related groceries a year ago
Base: All respondents 2023 (n=1500); 2017 (n=1478)

Purchase frequency of Ontario food

- Well-over half (56%) of shoppers report they purchase Ontario grown and produced food at least once a week (36% once a week, 15% 2-3 times a week and 4% 3+ times a week).
- Principled Affluent Local-enthusiasts are by far most likely to say they purchase local food most often.



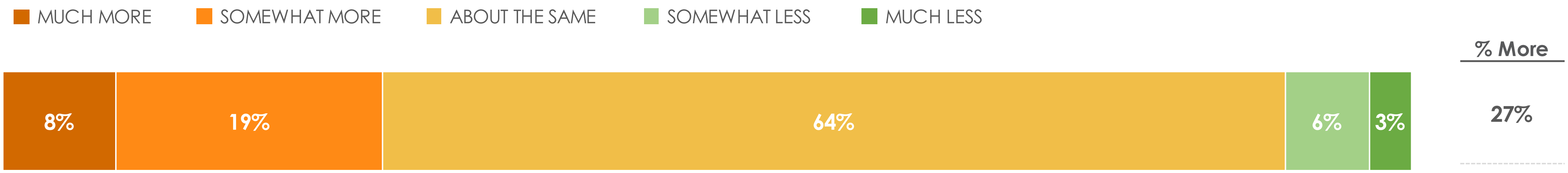
			TARGETS				
	TOTAL	Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
At least once a week %	**56%**	**80%**	**63%**	**60%**	**45%**	**54%**	**36%**

Q39. How frequently do you specifically purchase food grown and produced in Ontario? This includes fresh food like fruits, vegetables, dairy, meat and eggs or other produced products like maple syrup and honey.
Base: All respondents 2023 (n=1500)

▲▼ Indicates statistical significance vs. 2017

Purchase frequency of Ontario food (Cont.)

- Just over one quarter (27%) of shoppers say they are purchasing more Ontario grown and produced foods compared to last year, two-thirds (64%) about the same amount and one in ten (9%) less than what they were.
- On-the-go Convenience-oriented Suburbanites and Principled Affluent Local-enthusiasts are more likely to say they are purchasing more Ontario food than last year.



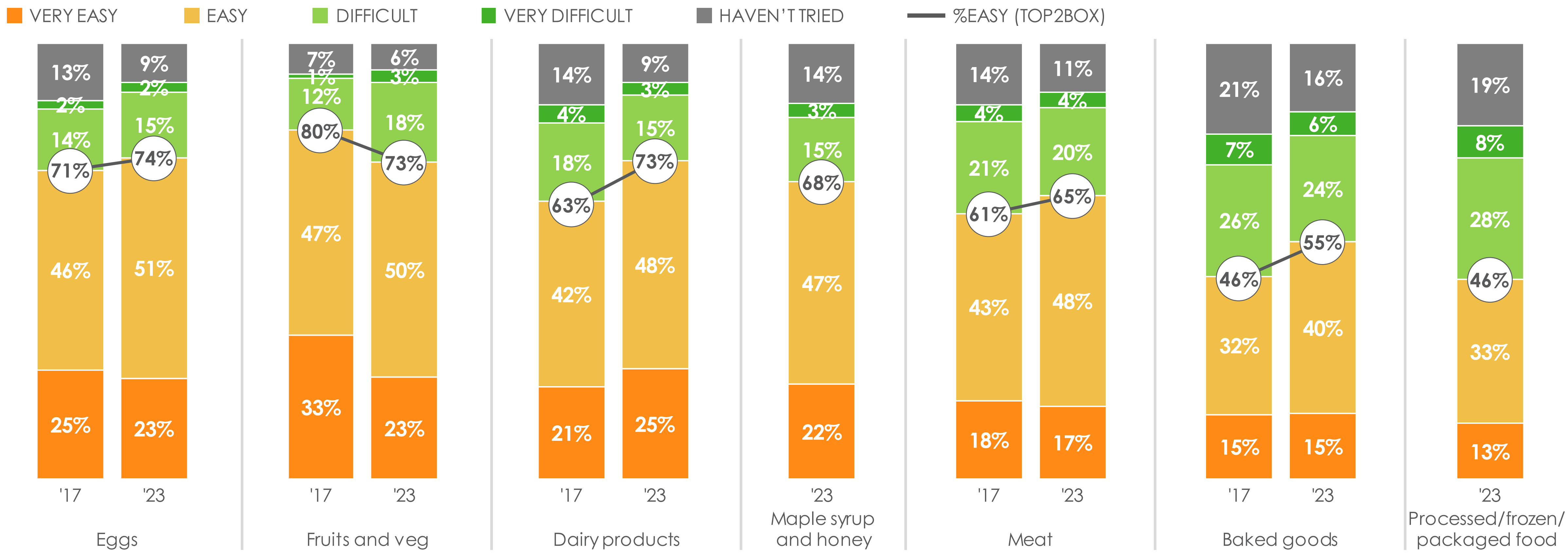
				TARGETS			
	TOTAL	Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	Ambitious Health-conscious Urbanites	Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
Much More % (T2B)	27%	31%	21%	26%	6%	41%	7%

Q40. Compared to last year, would you say you are purchasing more, less or about the same amount of Ontario grown or produced foods?
Base: All respondents 2023 (n=1500)

▲▼ Indicates statistical significance vs. 2017

Identifying Fresh Ontario Foods in Grocery Stores

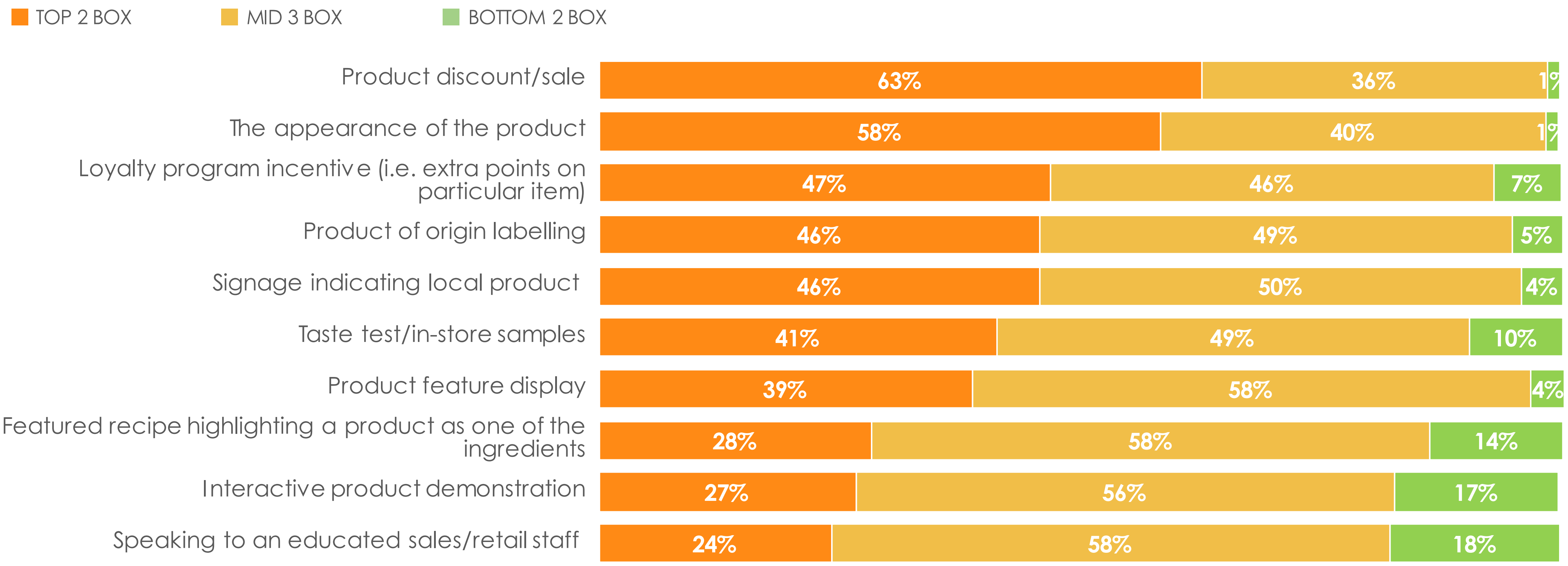
- In-store shoppers find it easiest to identify Ontario eggs, fruits and vegetables and dairy products in grocery stores, followed by maple syrup and honey, meat, baked good and processed foods.
- Compared to 2017, ease of identifying Ontario foods has increased for dairy products, baked good and meat and declined for fruits and vegetables.



Q29. How easy or difficult is it to identify these different foods when you are shopping in grocery stores?
Base: All respondents 2023 (n=1485); 2017 (n=1478)

Purchasing influence effectiveness – In-Store

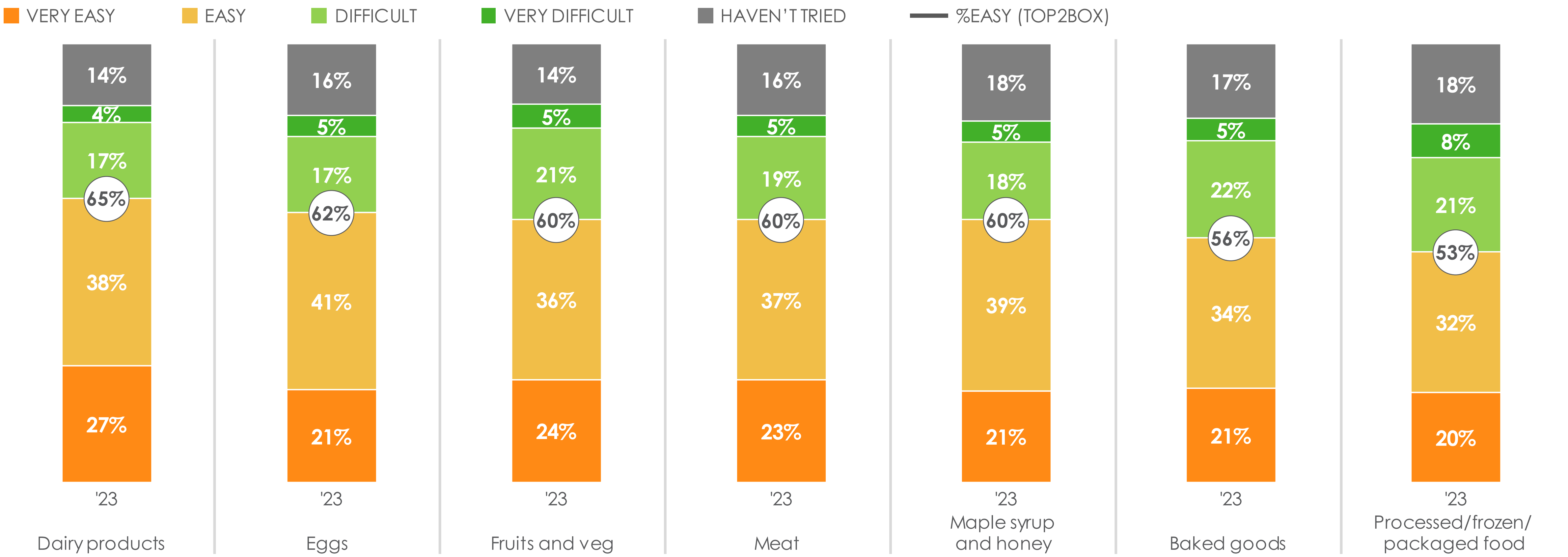
- At more than six in ten (63%) consumers are most likely to say that a product discount/ sale is the most effective at influencing their decision to purchase a particular product while in-store, followed closely by the appearance of the product (58%). Other more effective methods include loyalty program incentives (47%), product or origin labelling (46%) or signage indicating local product (46%).



Q31. Thinking about a typical grocery shopping trip, how effective do you feel each of the following are in influencing your decision to purchase a particular product? Using a scale from 1 to 7, where 1 means 'not effective at all' and 7 means 'very effective'.
Base: All Respondents 2023 (n=1485)

Identifying Fresh Ontario Foods in Grocery Online

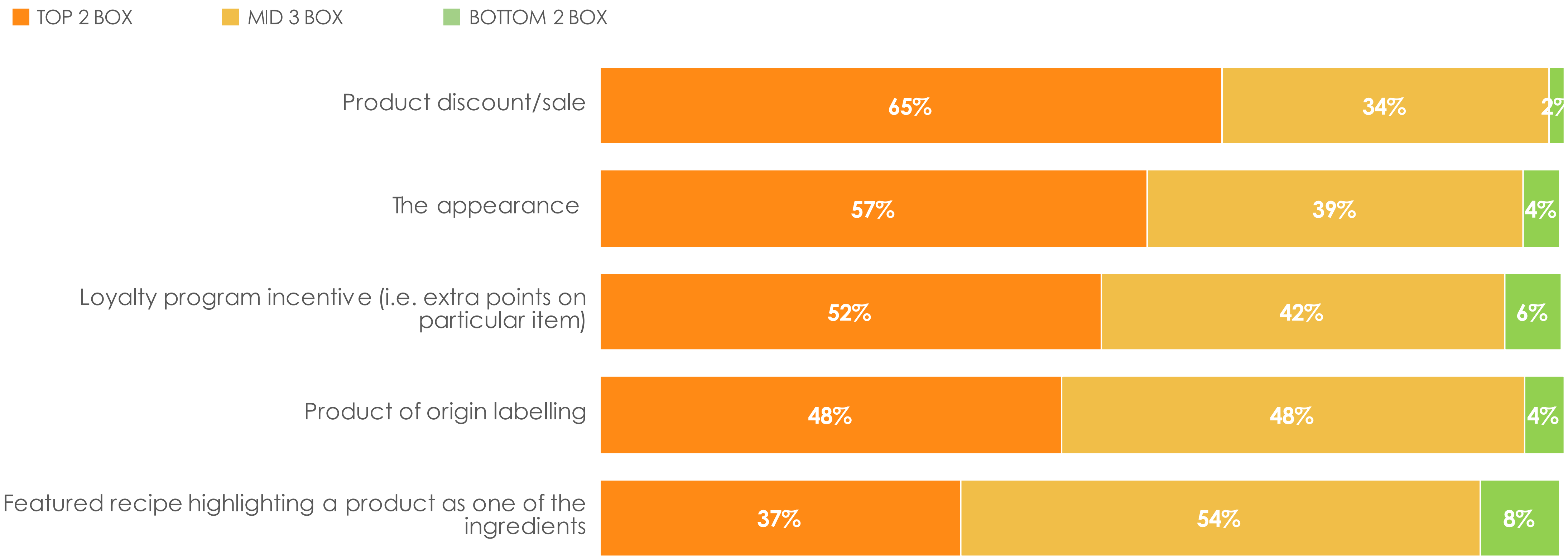
- Online shoppers find it easiest to identify Ontario dairy products, followed by eggs, fruit and vegetables, meat and maple syrup and honey. Fewer find it easy to identify Ontario baked goods or processed/ frozen/ packaged food when shopping online.



30. How easy or difficult is it to identify these different foods when you are shopping for groceries online?
Base: All respondents 2023 (n=618)

Purchasing influence effectiveness – Online

- At two-thirds(65%) consumers are most likely to say that a product discount/ sale is the most effective at influencing their decision to purchase a particular product when shopping online, followed by the appearance of the product (57%), loyalty program incentives (52%), product or origin labelling (48%) and featured recipes (37%).



Q32. Thinking about a typical grocery shopping experience online, how effective do you feel each of the following are in influencing your decision to purchase a particular product? Using a scale from 1 to 7, where 1 means 'not effective at all' and 7 means 'very effective'.
Base: All Respondents 2023 (n=618)

Ontario Food Locations

- At seven in ten (71%), the vast majority of shoppers would go to a supermarket when looking to purchase Ontario food, followed by a farmers market.
- Compared to 2017, shoppers are more likely to say they would purchase directly from the farmer/ producer or from a convenience store and fewer would go to the supermarket or a farmers market.
- Principled Affluent Local-enthusiasts and Established Patriotic Traditionalists are more likely to go to the supermarket, while Ambitious Health-conscious Urbanites are more likely to go to a farmers market.

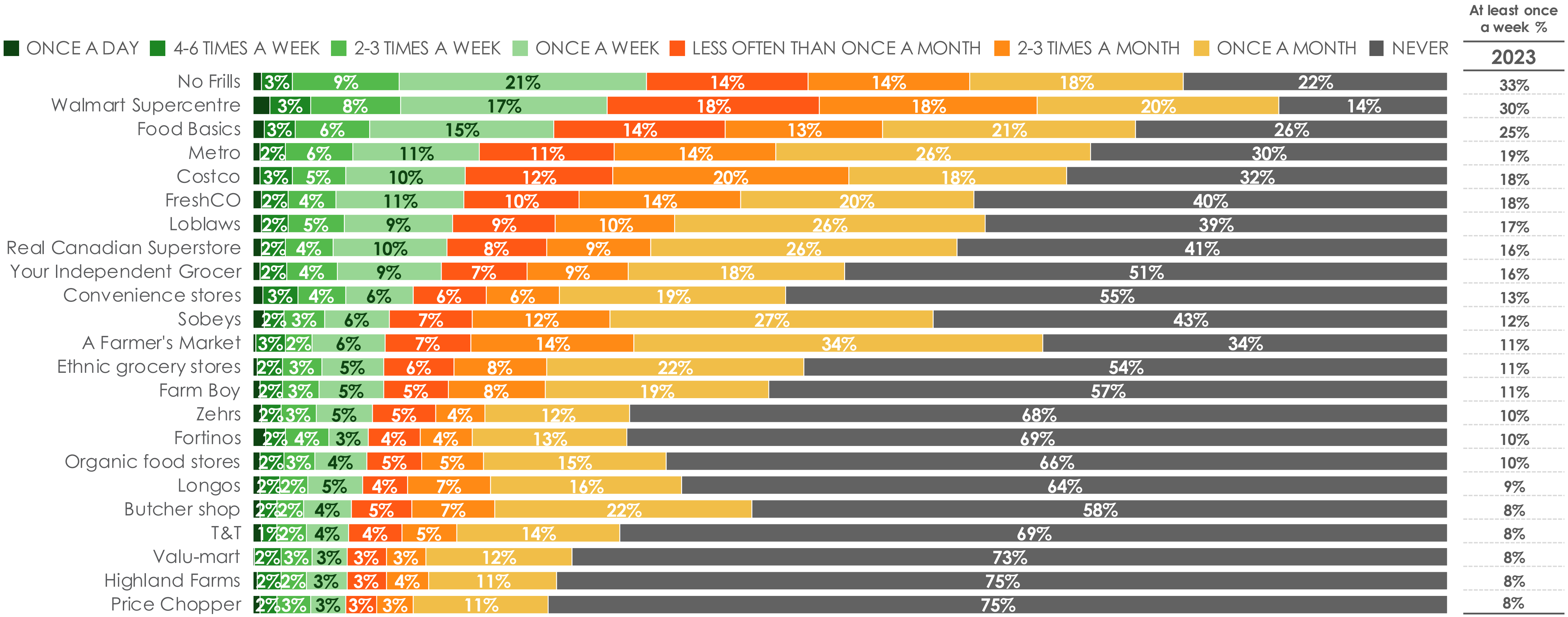
	TOTAL		Principled Affluent Local-enthusiasts	Established Patriotic Traditionalists	TARGETS: Ambitious Health-conscious Urbanites	TARGETS: Receptive Value-driven Consumers	On-the-go Convenience-oriented Suburbanites	Pessimistic Disengaged Frugal Consumers
	2017	2023	2023	2023	2023	2023	2023	2023
Supermarket	82%	71% ▼	82%	82%	72%	76%	61%	73%
Farmers market	73%	64% ▼	81%	78%	83%	72%	44%	65%
Independent grocery store	43%	40%	50%	40%	46%	50%	33%	37%
Direct from the farmer/producer	1%	37% ▲	55%	54%	46%	42%	21%	39%
Online retailer/grocery store	-	17%	14%	14%	19%	14%	21%	9%
Local independent restaurant	13%	14%	16%	10%	15%	11%	18%	9%
Ethnic grocery store(s)	8%	10%	9%	3%	11%	7%	14%	7%
Convenience store	3%	8% ▲	4%	1%	4%	1%	17%	3%
Chain restaurant	5%	6%	3%	4%	3%	4%	11%	2%
Other	-	1%	2%	1%	1%	1%	0%	1%
Nothing	1%	2% ▲	-	1%	-	-	4%	2%

33. If you were looking to purchase Ontario food (including fruits, vegetables, dairy, meat, eggs, maple syrup or honey) which of the following locations would you think to go to? Please select all that apply.
Base: All respondents 2023 (n=1500); 2017 (n=1478)

▲▼ Indicates statistical significance vs. 2017

Frequency of Grocery Store Visits

- Shoppers remain most likely to report visiting No Frills most frequently, followed by Walmart, Food Basics, Metro, Costco and FreshCo.



Q38a. How frequently do you shop at each of the following supermarkets or grocery stores?
Base: All respondents 2023 (n=1500); 2017 (n=1478)

▲▼ Indicates statistical significance vs. 2017

SEGMENT 4: RECEPTIVE VALUE-DRIVEN CONSUMERS

SEGMENT SIZE: 15%

PURCHASING BEHAVIOUR

- Place more importance on buying local for fresh fruits and vegetables and to a lesser extent dairy, eggs or fresh meat;
- Less likely to be influenced to buy more local across most factors. Most likely to be motivated if it were the cheaper option, if it were fresher than other fresh food options or if it were easier to identify when shopping for groceries online;
- Skews more likely to prefer to buy locally grown and produced food, but only if it is the same price or cheaper than imported.

ATTITUDES TOWARDS ONTARIO FRESH FOOD

- Rate Ontario food higher for freshness than other segments. Provide lower ratings across most other factors particularly for organic, long shelf-life and ethical production;
- Express a high degree of respect for farmers and believe their purchase of local food helps the economy/ benefits farmers, also more likely to say they trust food produced in Ontario;
- More likely to get information on food and nutrition through online searches and newspapers;
- Less likely than other segments to say the Foodland Ontario symbol has influence over their choice to purchase Ontario grown or produced foods;

GENERAL ATTITUDES/ PSYCHOGRAPHICS

- More likely to feel the Ontario economy will improve in the next year;
- More likely to say it's okay to eat junk food sometimes, that they enjoying trying new and exotic foods and that they like to eat ethnic foods from all different places in the world.
- More likely to feel that having a diverse population with different ethnicities, cultures, etc. is a very good thing for the country.

IMPRESSIONS OF COVID-19

- More likely to say they miss having dinner parties with their friends and family and that shopping local is one of the best ways to support Ontario`s economic recovery post-pandemic
- More likely to feel that going to or hosting friends or family for a meal, going to a restaurant for indoor dining, or going to a bar/ pub are currently risky behaviours.
- More likely to be seriously considering going to a grocery store or to a restaurant for outdoor/ patio dining in the next month.
- More likely to be vaccinated than other segments.

DEMOGRAPHICS

- Consistent with general population on age and gender;
- Skews towards GTA 416 and Southwestern Ontario;
- Among least likely to have children in the household;
- Skews more highly educated (55% have a university education);
- Skews slightly higher income (43% over $80k annually);