



Factors Influencing Pulse Consumption in Canada

Segment Toolkit: Unexposed Reachables

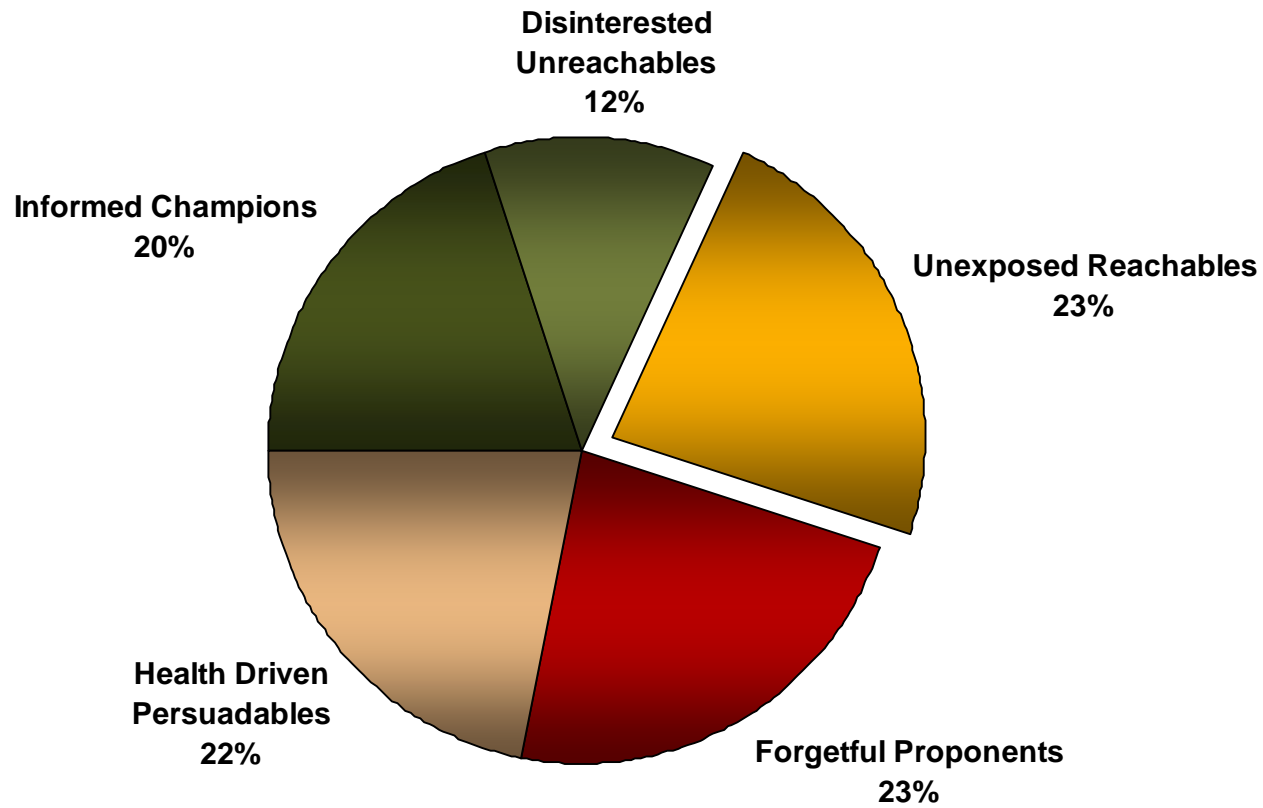




Segmentation Summary



Pulse Consumer Segments



Base: All respondents (n=1,100)

Segmentation Summary

Segment Name & Size	Informed Champions (20%)	Disinterested Unreachables (12%)	Unexposed Reachables (23%)	Forgetful Proponents (23%)	Health Driven Persuadables (22%)
Motto	<i>"Pulses are superfoods"</i>	<i>"I don't give much thought to food and health"</i>	<i>"I don't like the taste and I don't know how to cook them, but if they are healthy and help with weight control..."</i>	<i>"I really like pulses, but need someone to jog my memory and give me new recipe ideas"</i>	<i>"Tell me how! I like pulses, I find the health and enviro benefits motivating, but I don't know how to cook them"</i>
Pulse Consumption	<ul style="list-style-type: none"> • 51% weekly consumers & 48% monthly consumers • Highest frequency of monthly consumption at ethnic restaurants 	<ul style="list-style-type: none"> • 46% non-consumers & 46% monthly consumers • Among restaurant consumers, high consumption at fast food restaurants (35%) 	<ul style="list-style-type: none"> • 44% non-consumers & 53% monthly consumers • Among restaurant consumers, lowest frequency of consumption 	<ul style="list-style-type: none"> • 70% monthly consumers & 23% weekly consumers • High past 6 months consumption at restaurants (47%) 	<ul style="list-style-type: none"> • 75% monthly consumers & 13% weekly consumers • Lower frequency of consumption at fast food and non-ethnic restaurants
Attitudes Towards Pulses	<ul style="list-style-type: none"> • Like the taste (99%) • Family likes eating pulses (91%) • Trying to choose vegetarian meals more often (72%) • Pulses are part of traditional diet (68%) 	<ul style="list-style-type: none"> • Don't like the taste of pulses (37%; 26% DK/NA) • Family doesn't like eating pulses (42%; 29% DK/NA) • Not trying to choose vegetarian meals more often (61%; 27% DK/NA) • Not part of traditional diet (60%; 27% DK/NA) 	<ul style="list-style-type: none"> • Don't think of including in meal planning (82%) • Don't know how to cook or prepare (75%) • Don't like the taste (54%; 17% DK/NA) • Family doesn't like eating pulses (43%; 29% DK/NA) • Not part of traditional diet (87%) • Not trying to choose vegetarian meals (85%) 	<ul style="list-style-type: none"> • Like the taste (92%) • Family likes eating pulses (74%) • Know how to cook or prepare pulses (85%) • Half say pulses are part of traditional diet (49%) • Just under half (45%) don't think about including pulses in meal planning or preparation 	<ul style="list-style-type: none"> • Don't think of including in meal planning (86%) • Don't know how to cook or prepare (74%) • Most like the taste (77%) • Comparatively fewer say their family likes eating pulses (59%) • Half are trying to choose vegetarian meals more often (48%)

Segmentation Summary Continued

Segment Name & Size	Informed Champions (20%)	Disinterested Unreachables (12%)	Unexposed Reachables (23%)	Forgetful Proponents (23%)	Health Driven Persuadables (22%)
Attitudes Towards Food and Health	<ul style="list-style-type: none"> • Usually look at nutritional labels (96%) • Concerned about eating a healthy diet (99%) • Like to try out different types of foods and recipes (97%) • Enjoy eating ethnic foods (84%) 	<ul style="list-style-type: none"> • Do not usually look at nutritional labels (86%) • Do not look for healthy snacks (69%) • Not concerned about weight control (64%) • Not concerned about eating a healthy diet (56%) • Do not like to try new foods or recipes (58%) 	<ul style="list-style-type: none"> • Concerned about weight control (90%) • Concerned about eating a healthy diet (94%) • Look for healthy snacks (88%) • Do not like eating ethnic foods (67%) 	<ul style="list-style-type: none"> • Like to try out different types of foods and recipes (74%) • Over half (54%) enjoy eating ethnic foods 	<ul style="list-style-type: none"> • Usually look at nutritional labels (90%) • Look for healthy snacks (94%) • Like to try out different types of foods and recipes (94%) • Enjoy eating ethnic foods (81%) • Busy, on-the-go lifestyle (79%)
Other Defining Characteristics	<ul style="list-style-type: none"> • Extremely health conscious • Environmentally engaged and when possible, buy food grown in Canada • Health benefits clearly the most important factors when deciding whether or not to eat pulses • Info about both health and environmental benefits would have a positive impact on consumption 	<ul style="list-style-type: none"> • Taste is by far the most important factor when deciding whether or not to eat pulses • Info about health and environmental benefits would <u>not</u> make most more likely to eat pulses 	<ul style="list-style-type: none"> • Taste is the most important factor when deciding whether or not to eat pulses • Info about health benefits would make the majority more likely to eat pulses 	<ul style="list-style-type: none"> • Wanting 'variety in my diet' is a barrier to eating pulses more often • Taste and health benefits are the top two factors when deciding whether to eat pulses • High fibre and protein content are important • Info about health benefits would make the majority more likely to eat pulses 	<ul style="list-style-type: none"> • Extremely health conscious • Environmentally engaged and when possible, buy food grown in Canada • Health benefits the most important factors when deciding whether or not to eat pulses • Info about both health and environmental benefits would make them more likely to eat pulses

Segmentation Summary Continued

Segment Name & Size	Informed Champions (20%)	Disinterested Unreachables (12%)	Unexposed Reachables (23%)	Forgetful Proponents (23%)	Health Driven Persuadables (22%)
Profile	<ul style="list-style-type: none"> • Highest incidence of vegetarian or vegan in household (12%) • Higher female (61%) • Highest education (33% university degree, 48% post-secondary) • Highest in British Columbia (29%) • Half live in two person households (53%) 	<ul style="list-style-type: none"> • Highest percentage of underweight (14%) • Low incidence of heart disease or high blood cholesterol levels in household (16%) • Majority male (56%) • Youngest segment (average age 43 years) • Less educated (15% university degree) • Three-in-ten live alone 	<ul style="list-style-type: none"> • Not differentiated by age, gender, education or income • Lowest in British Columbia (13%) • Highest incidence of born and raised in Canada (93%) 	<ul style="list-style-type: none"> • Majority male (55%) • Older – lowest percentage of 18 to 34 year olds (20%), average age 49 years • Lowest in Atlantic Canada (14%) 	<ul style="list-style-type: none"> • Not differentiated by age, gender or education • Highest percentage (22%) in the \$100K+ income bracket
Messaging and Marketing	<ul style="list-style-type: none"> • Highest consumption – no need to target directly • Messages targeting other segments will resonate 	<ul style="list-style-type: none"> • Low opportunity segment • Recipe ideas, health benefits and environmental benefits unlikely to have any impact 	<ul style="list-style-type: none"> • Best opportunity for converting non-consumers • Provide a variety of 'great tasting' basic recipes for pulses • Focus on the health benefits of pulses, including weight control 	<ul style="list-style-type: none"> • Opportunity to move from monthly to weekly • Provide new and different recipes – teach them the wide variety of ways they can be used • Remind about the fibre and protein content as well as other health benefits 	<ul style="list-style-type: none"> • Opportunity to move from monthly to weekly • Teach them how to cook pulses • Provide a variety of quick, easy to prepare recipes including vegetarian and ethnic • Primary focus health; secondary environment



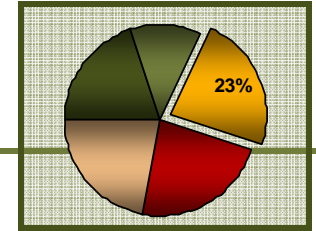
Unexposed Reachables: Snapshot





Unexposed Reachables

I don't like the taste of pulses and I don't know how to cook with them, but if they are healthy and help with weight control...



Key Differentiators



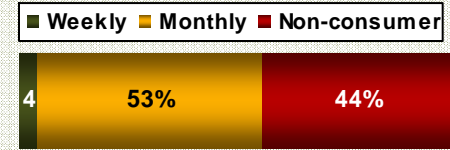
Attitudes Towards Pulses

- ✓ Do not think of including pulses in meal planning or preparation (82%)
- ✓ Do not know how to cook or prepare pulses (75%)
- ✓ Do not like the taste of pulses (54%, and 17% don't know / not applicable)
- ✓ Family does not like eating pulses (43%, and 29% don't know / not applicable)
- ✓ Pulses are not part of traditional diet (87%)
- ✓ Not trying to choose vegetarian meals more often (85%)

Attitudes Towards Food and Health

- ✓ Concerned about weight control (90%)
- ✓ Concerned about eating a healthy diet (94%)
- ✓ Look for healthy snacks (88%)
- ✓ Do not like eating ethnic foods (67%)

Pulse Consumption



- ✓ Low past 6 months consumption at restaurants (28%)
- ✓ Among restaurant pulse consumers, lowest frequency of consumption at all restaurant types

Demographics:

- ✓ Not differentiated by age, gender, education or income
- ✓ Lowest representation in British Columbia (13%)
- ✓ Highest incidence of born and raised in Canada (93%)

Other Defining Characteristics:

- ✓ Taste is the most important factor when deciding whether or not to eat pulses
- ✓ Information about health benefits would make the majority more likely to eat pulses



Unexposed Reachables: Messaging and Marketing

- ❖ For Unexposed Reachables, pulses generally fall outside their consideration set with regards to meal planning or preparation.
- ❖ While they have not had a great deal of exposure to pulses, the health benefits of pulses resonate strongly.
- ❖ They should be a primary target segment as current consumption is low, but the main barrier is lack of exposure, and communicating information about the health benefits could effectively drive them to increase their pulse consumption.
- ❖ Teaching them how to cook a variety of 'great tasting' basic recipes (i.e. not ethnic or vegetarian options), and focusing on the health benefits of pulses – including weight management – should be the focus of targeted communications.

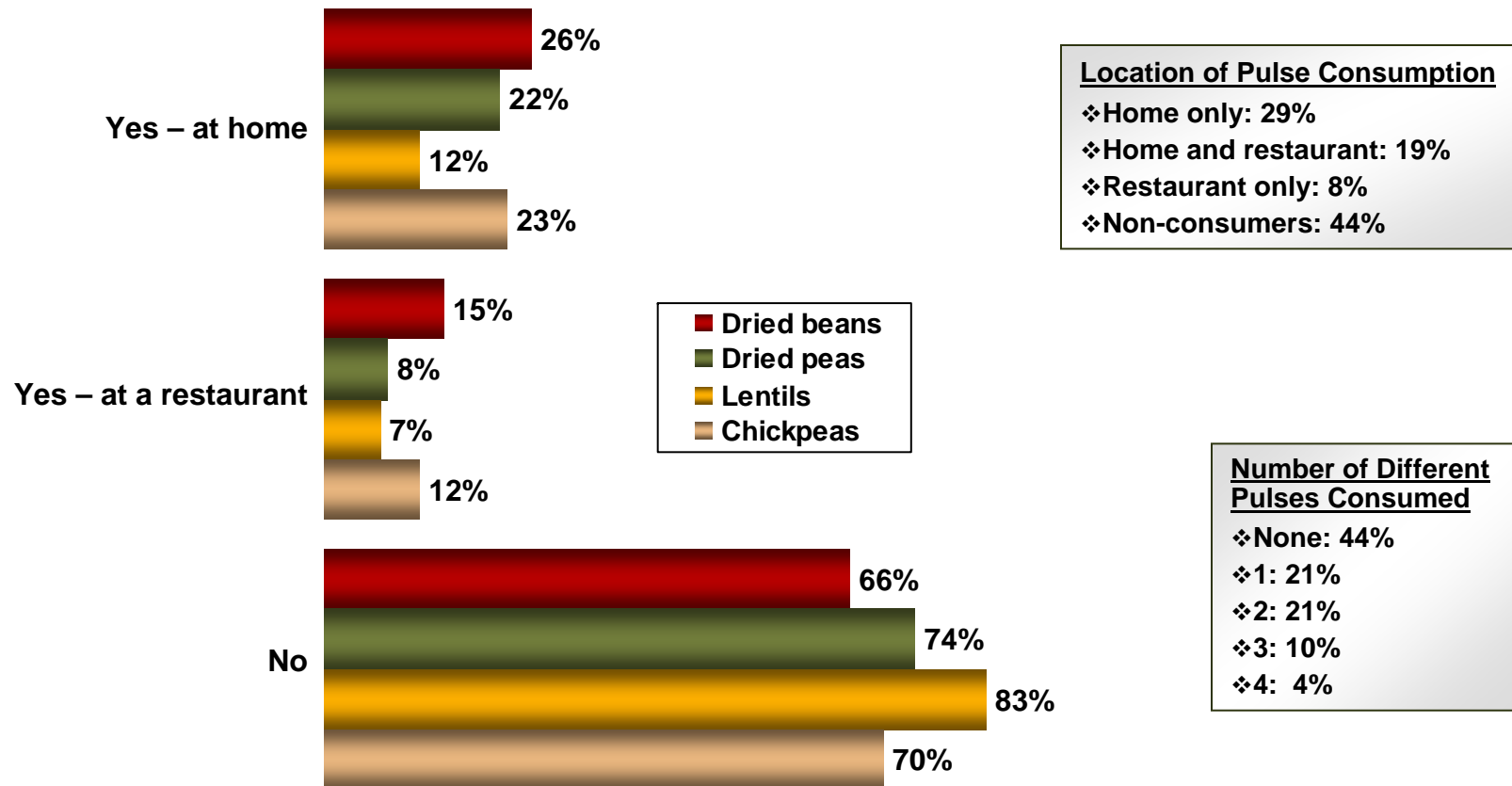
Pulse Consumption: Types, Frequency and Form





Past Six Months Pulse Consumption Unexposed Reachables

Q1/Q5/Q9/Q13. In the past 6 months, have you eaten dishes made with *dried beans/dried peas/lentils/chickpeas or chickpea flour* either in your home or at any type of restaurant?



Base: All respondents (n=250)



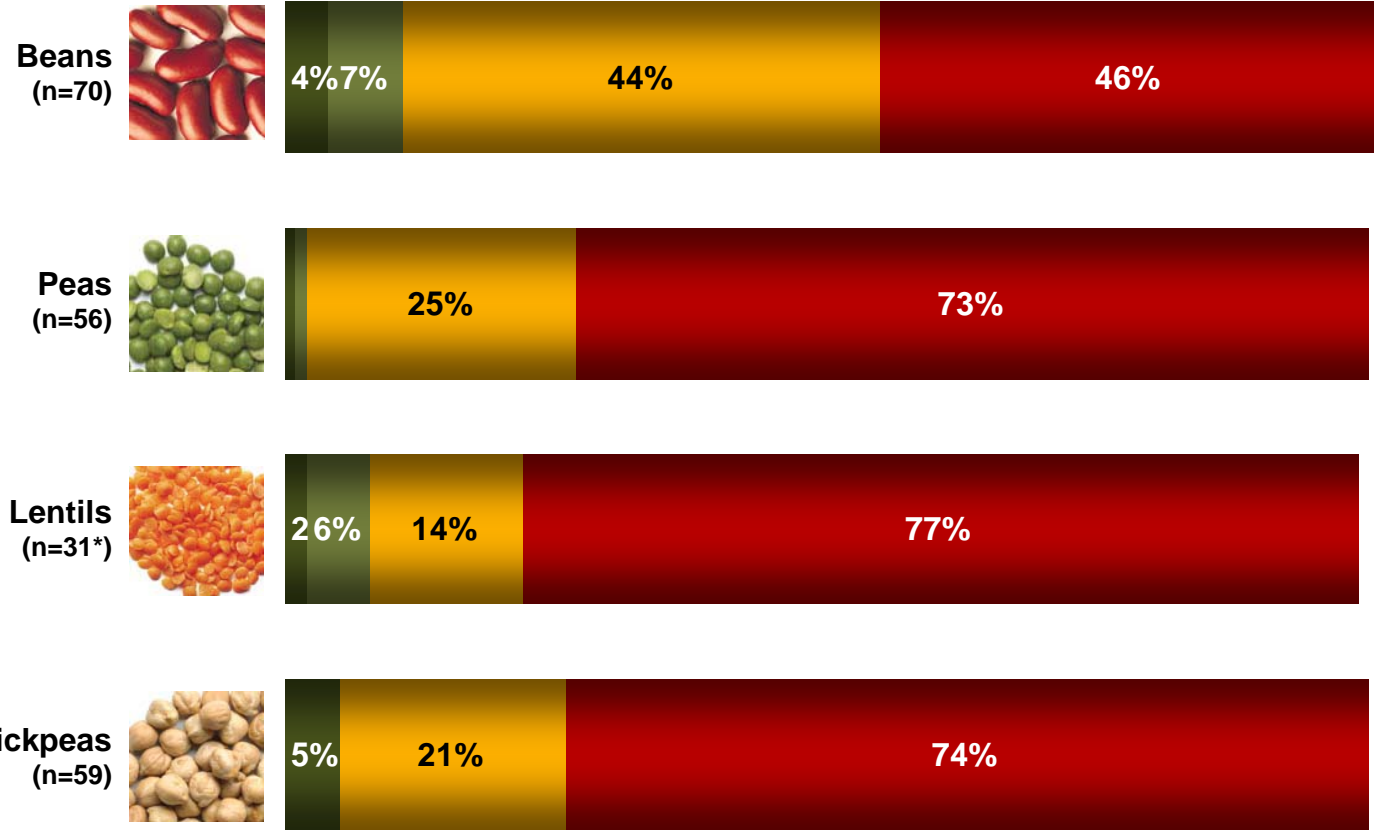
Frequency of Pulse Consumption at Home

Unexposed Reachables

Q2/Q6/Q10/Q14. How often do you or do other members of your household eat dishes made with *dried beans or bean flour/dried peas/lentils/chickpeas or chickpea flour at home?*

❖ Moderate to heavy: 4%
 ❖ Light: 53%
 ❖ Non-consumers: 44%

■ 4 or more times per week ■ 1 to 3 times per week ■ 1 to 3 times per month ■ Less than once a month



Non-consumers = No pulse consumption in past 6 months

Light consumers = Consumed 1 or more types pulses in the past 6 months but none weekly or more

Moderate to heavy consumers = Consumed 1 or more types of pulses in the past 6 months weekly or more

Caution: *Small base size

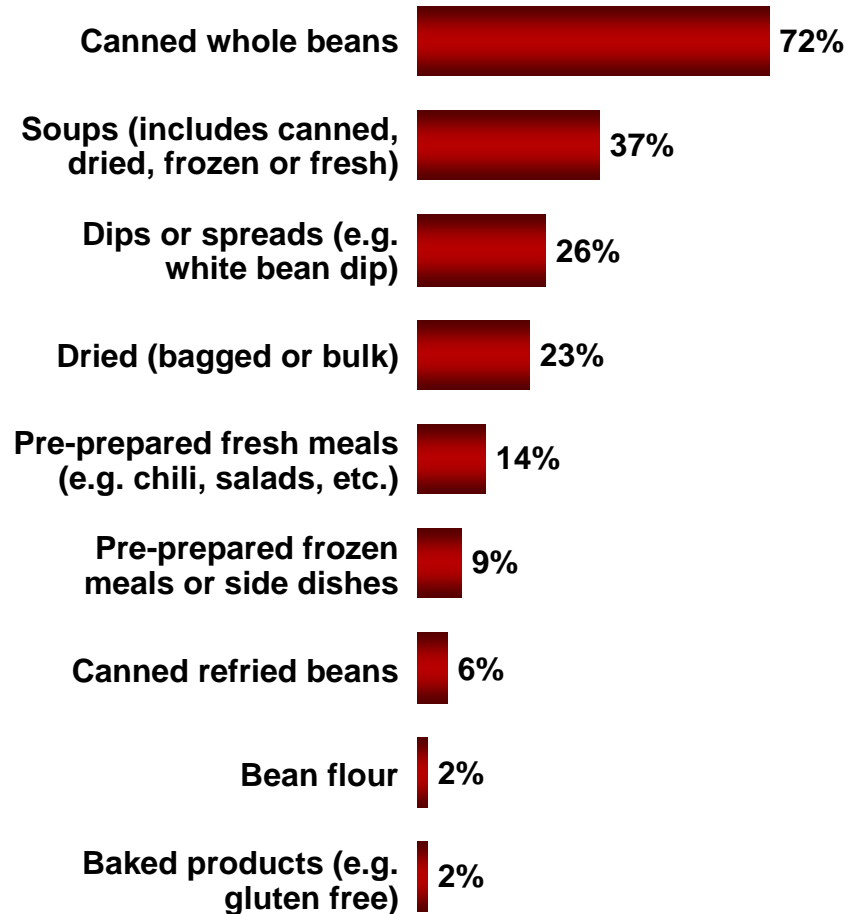
Base: Past 6 months pulse consumption at home



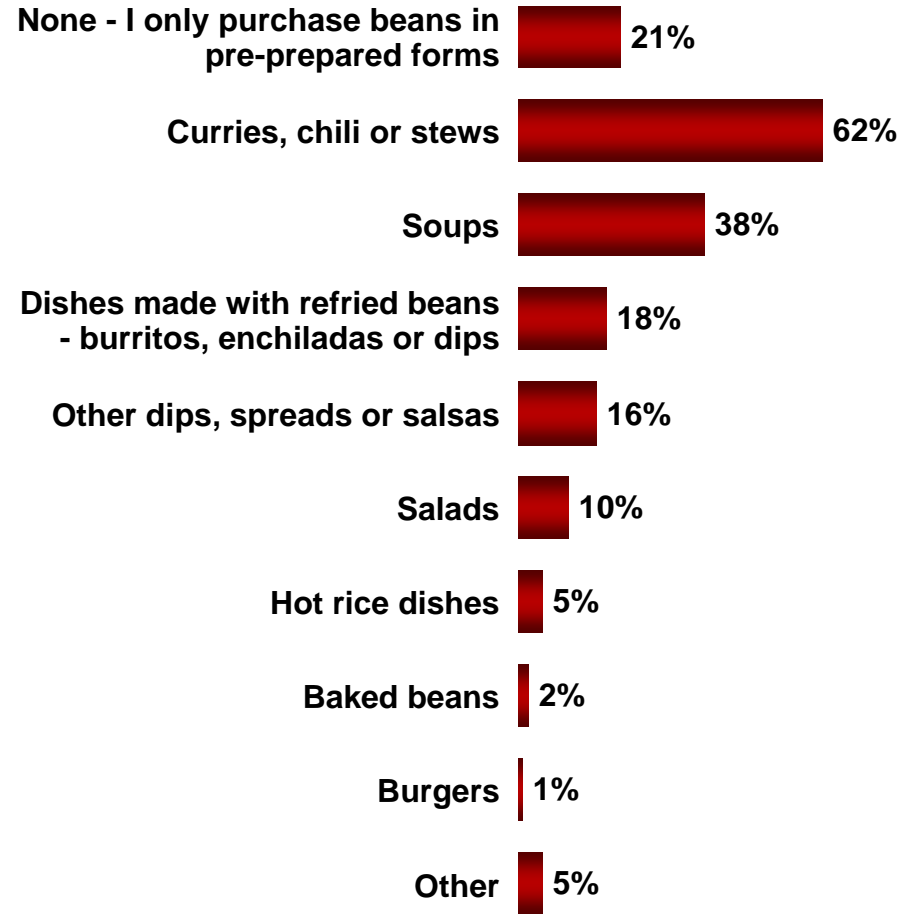
Dried Beans: Form and Types of Dishes Consumed at Home

Unexposed Reachables

Q3. In what form do you purchased **dried beans** you eat at home? (Note: This does not include fresh, frozen or canned green [string] beans).



Q4. What types of dishes do you make with **dried beans** (whether bagged, bulk or canned) or bean flour at home?



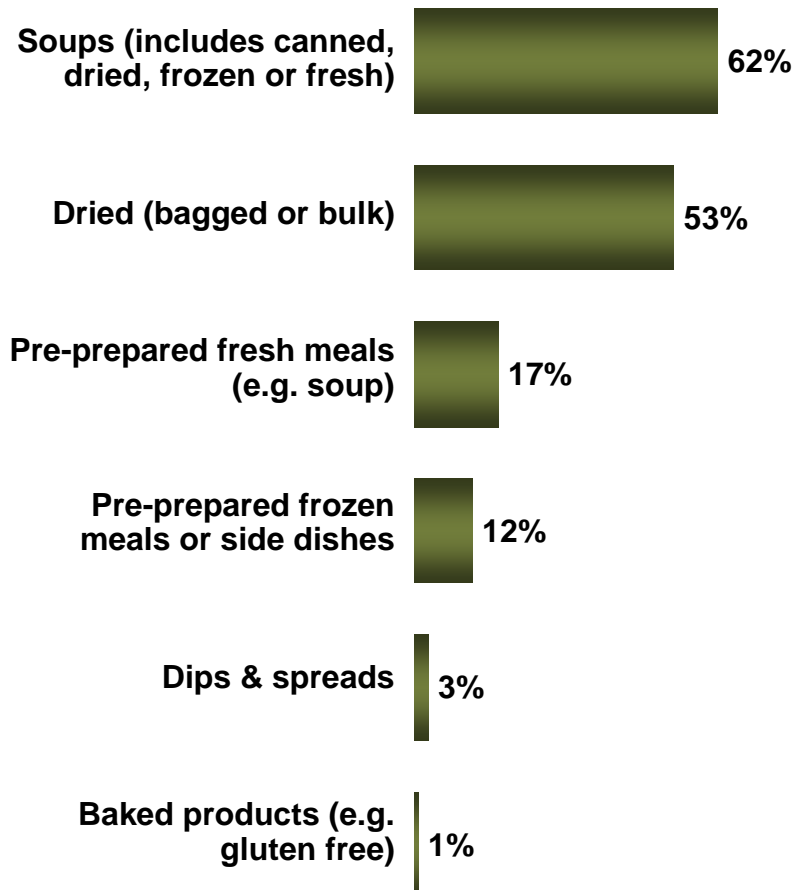
Base: Past 6 months dried bean consumption at home (n=70)



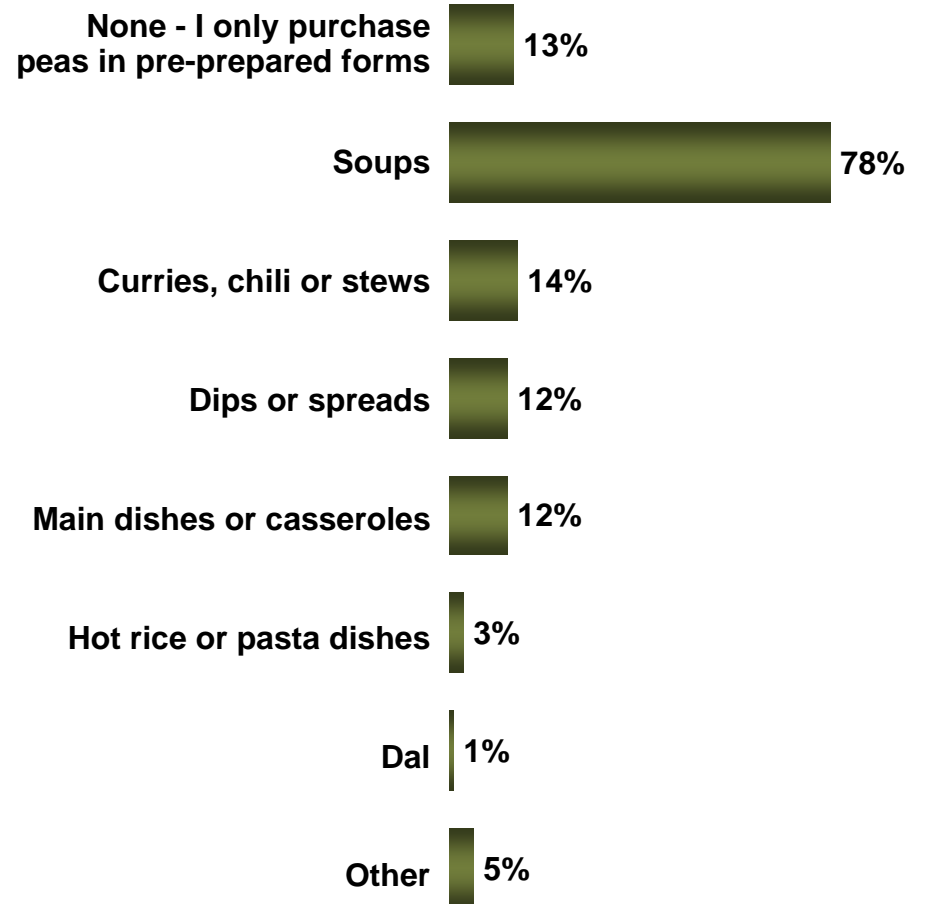
Dried Peas: Form and Types of Dishes Consumed at Home

Unexposed Reachables

Q7. In what form do you purchased **dried peas** you eat at home? (Note: This does not include fresh, frozen or canned green peas).



Q8. What types of dishes do you make with **dried peas** (whether bagged, bulk or canned) or pea flour at home?



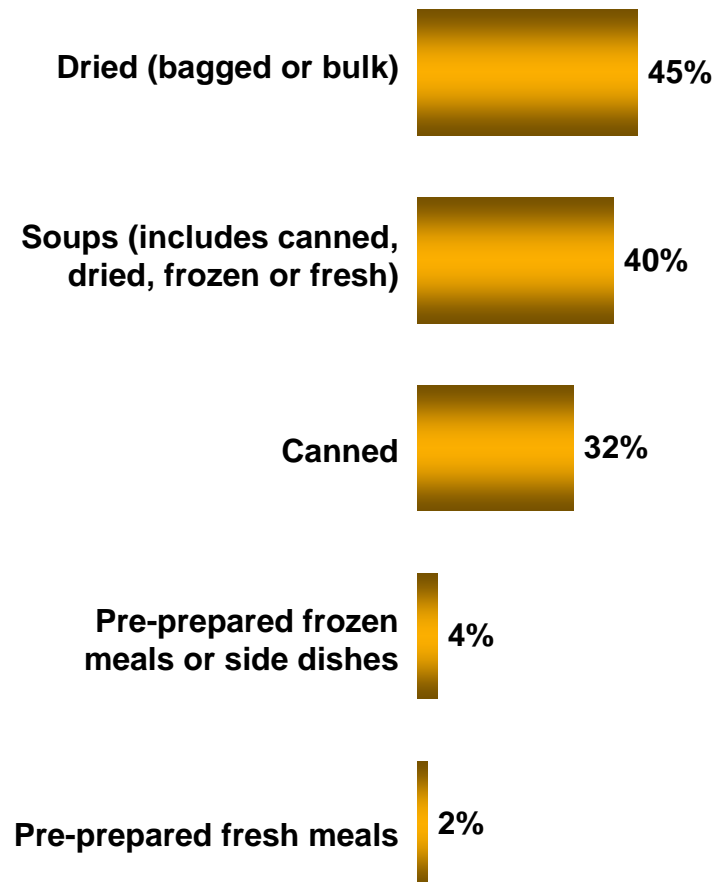
Base: Past 6 months dried peas consumption at home (n=56)



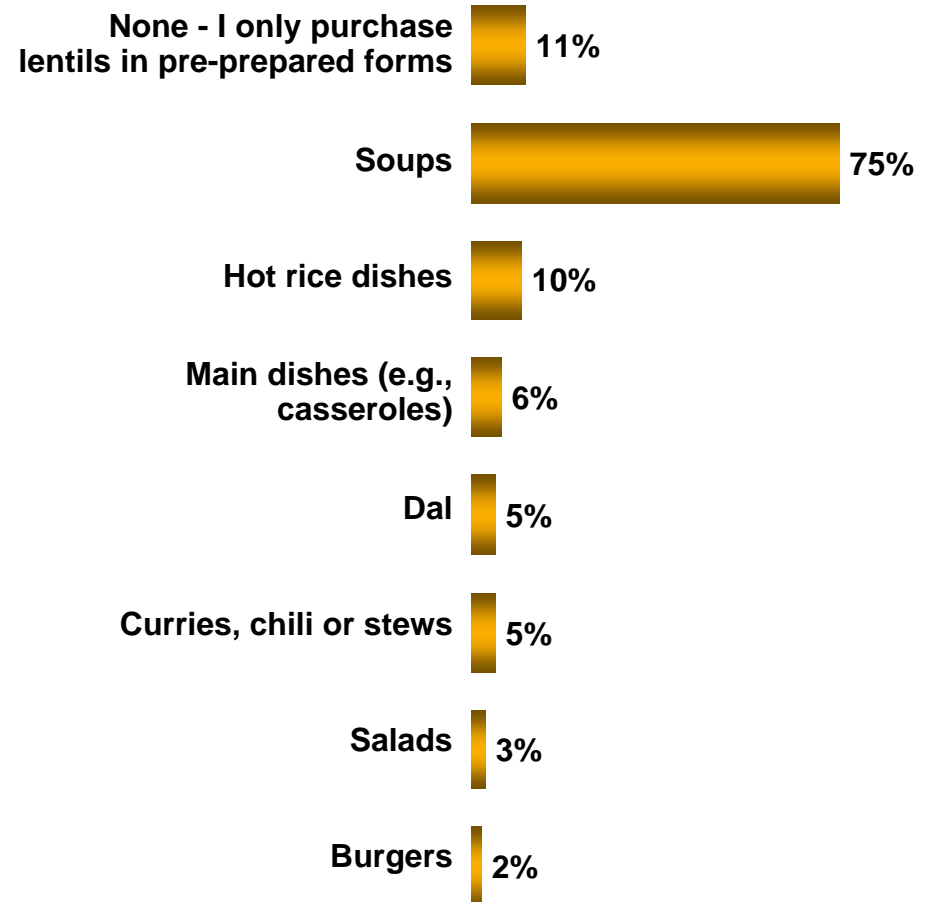
Lentils: Form and Types of Dishes Consumed at Home

Unexposed Reachables

Q11. In what form do you purchased *lentils* that you eat at home?



Q12. What types of dishes do you make with *lentils* (whether bagged, bulk or canned) at home?



Caution: *Small base size

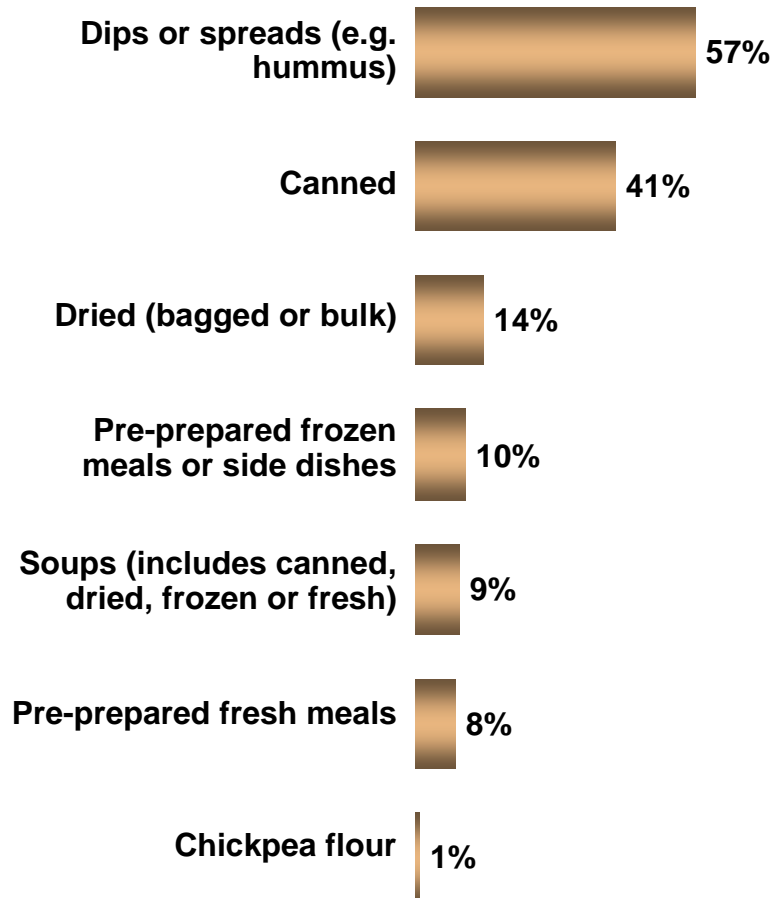
Base: Past 6 months lentil consumption at home (n=31*)



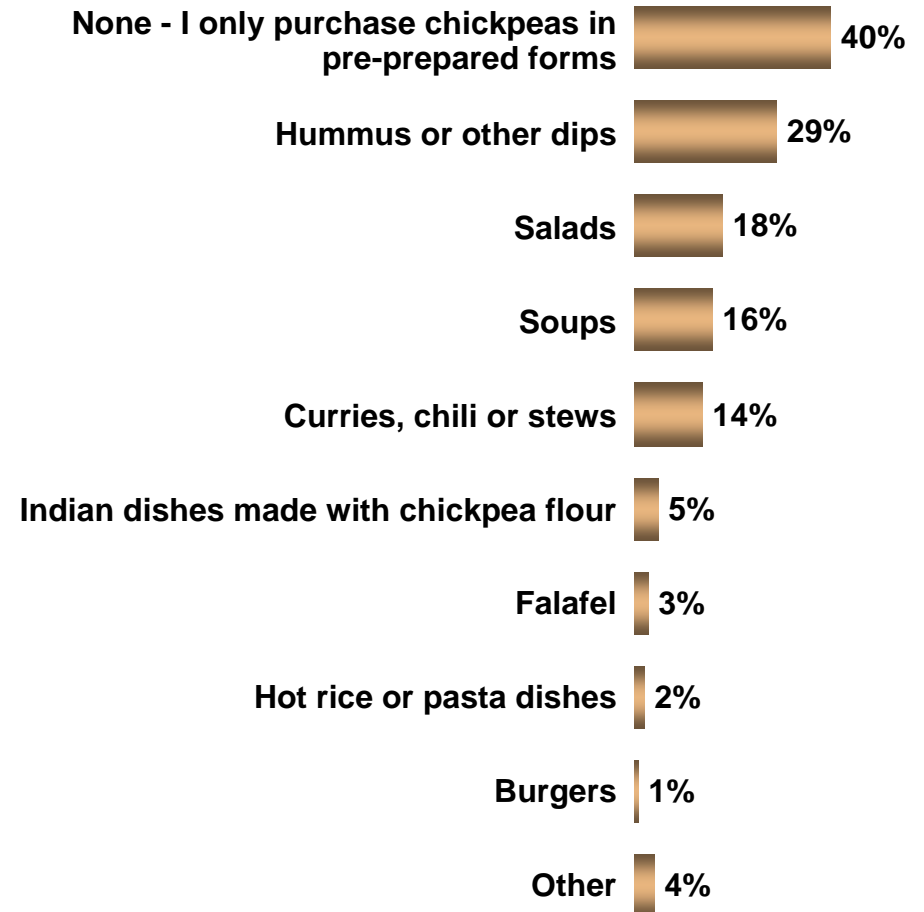
Chickpeas: Form and Types of Dishes Consumed at Home

Unexposed Reachables

Q15. In what form do you purchased **chickpeas** that you eat at home?



Q16. What types of dishes do you make with **chickpeas** (whether bagged, bulk or canned) or chickpea flour at home?



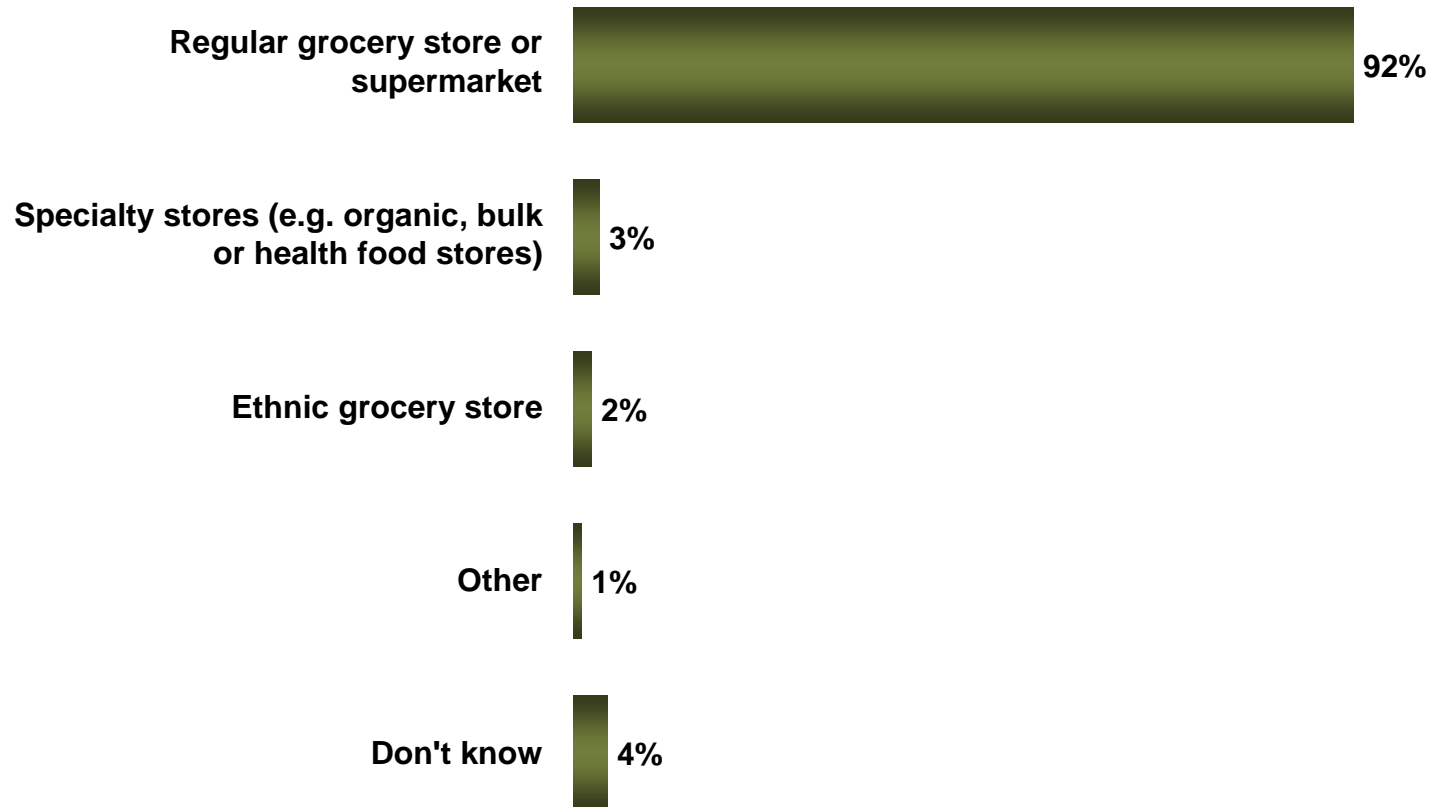
Base: Past 6 months chickpea consumption at home (n=59)



Purchase of Pulses for Home Use

Unexposed Reachables

Q17. Where do you usually purchase pulses that you use at home?



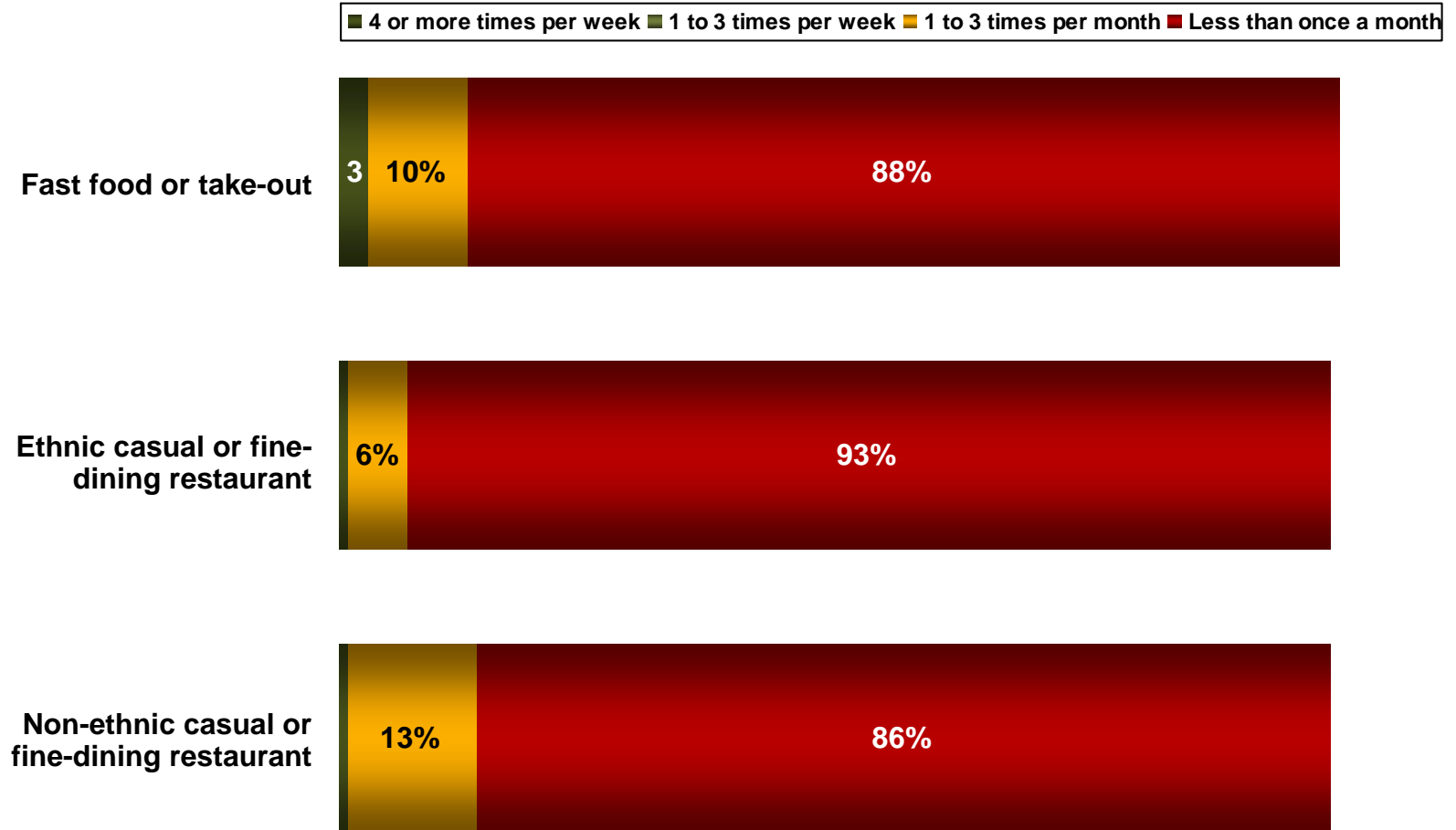
Base: Past 6 months pulse consumption at home (n=122)



Frequency of Pulse Consumption at Restaurants

Unexposed Reachables

Q18. Approximately, how often do you eat dishes using pulses (dry beans, peas, lentils and chickpeas) at each of the following types of restaurants?



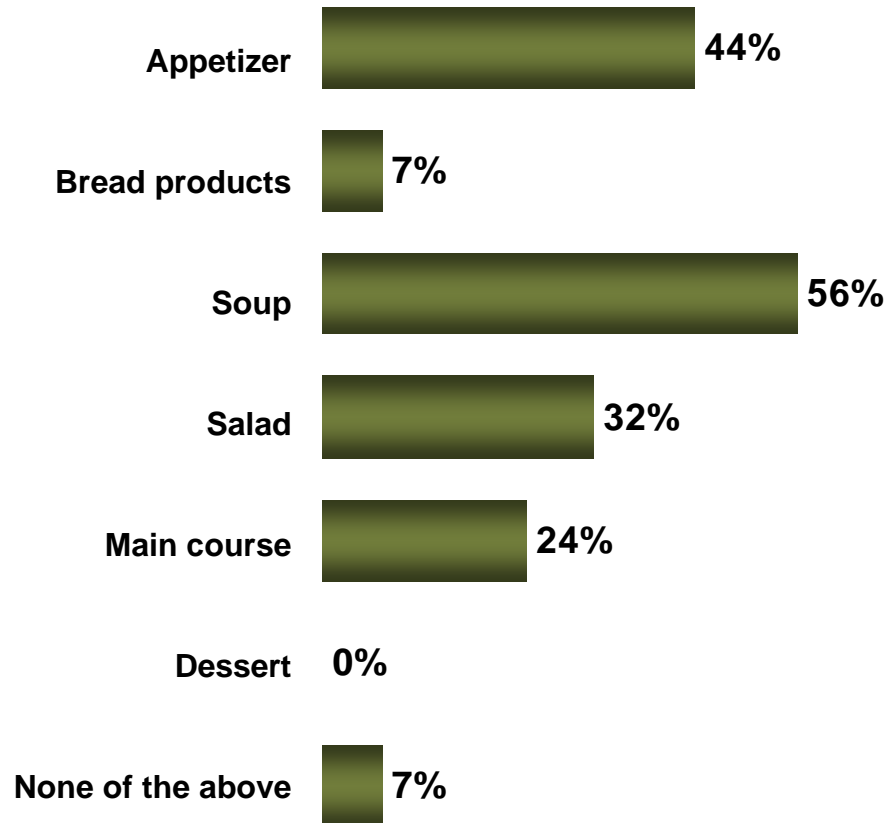
Base: Past 6 months pulse consumption at a restaurant (n=68)



Types of Pulse Dishes Consumed at Restaurants

Unexposed Reachables

Q19. What types of dishes made with pulses do you typically eat at restaurants?

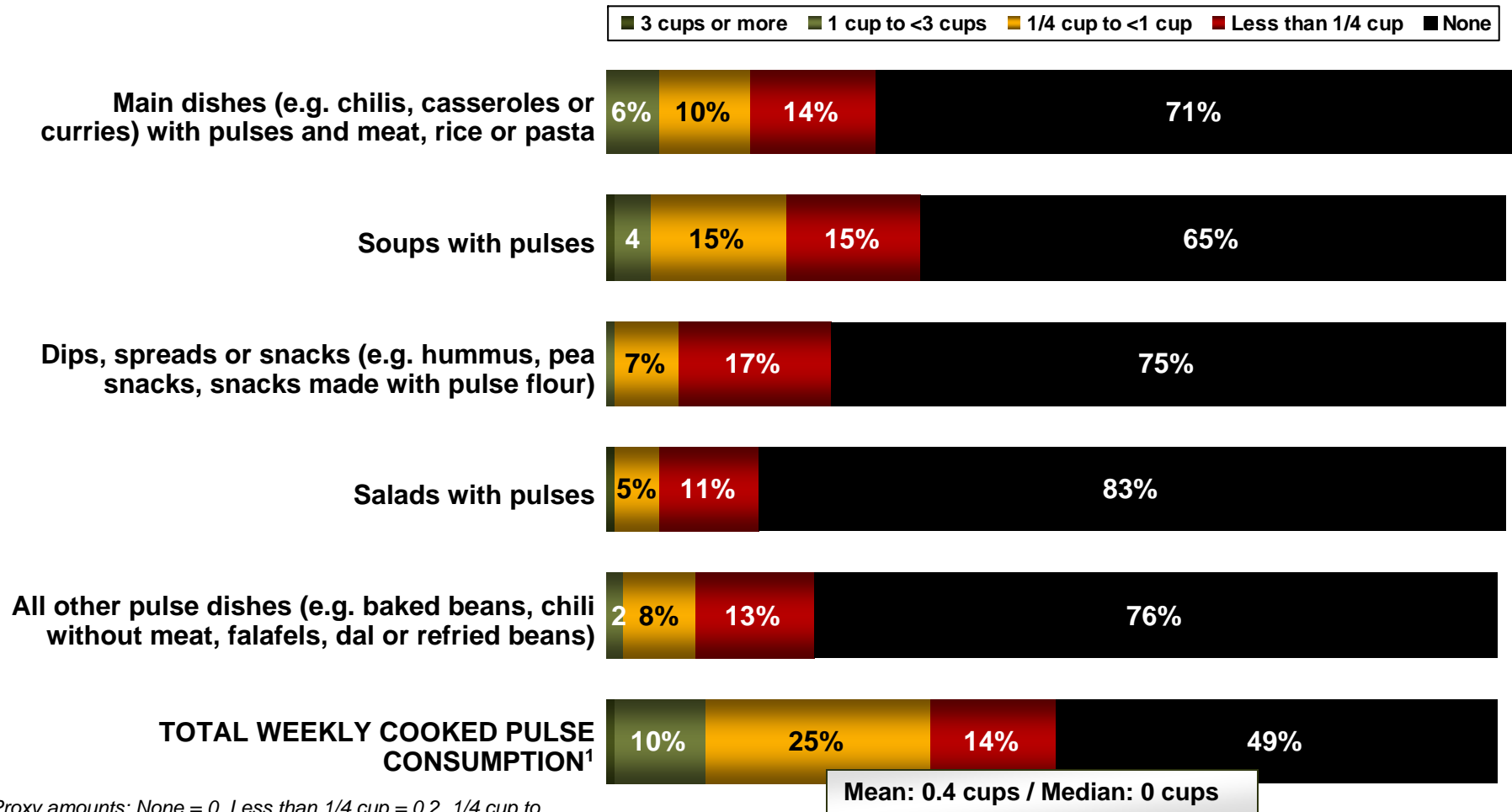


Base: Past 6 months pulse consumption at a restaurant (n=68)



Weekly Cooked Pulse Consumption Unexposed Reachables

Q20. Thinking about a typical week, approximately, how many total cups of prepared foods that include pulses (beans, peas, lentils or chickpeas) would you eat? Please consider all locations (at home, in restaurants) and all forms (soups, chilis, dips, snacks).



¹Proxy amounts: None = 0, Less than 1/4 cup = 0.2, 1/4 cup to <1 cup = 0.5, 1 cup to <3 cups = 2.0, 3 cups or more = 3.0
Conversions: Main dishes = 0.4, Soups = 0.3, Dips or spreads = 1.0, Salads = 0.3, All other pulse dishes = 0.9

Base: All respondents (n=250)



Pulse Consumption: Motivators and Barriers

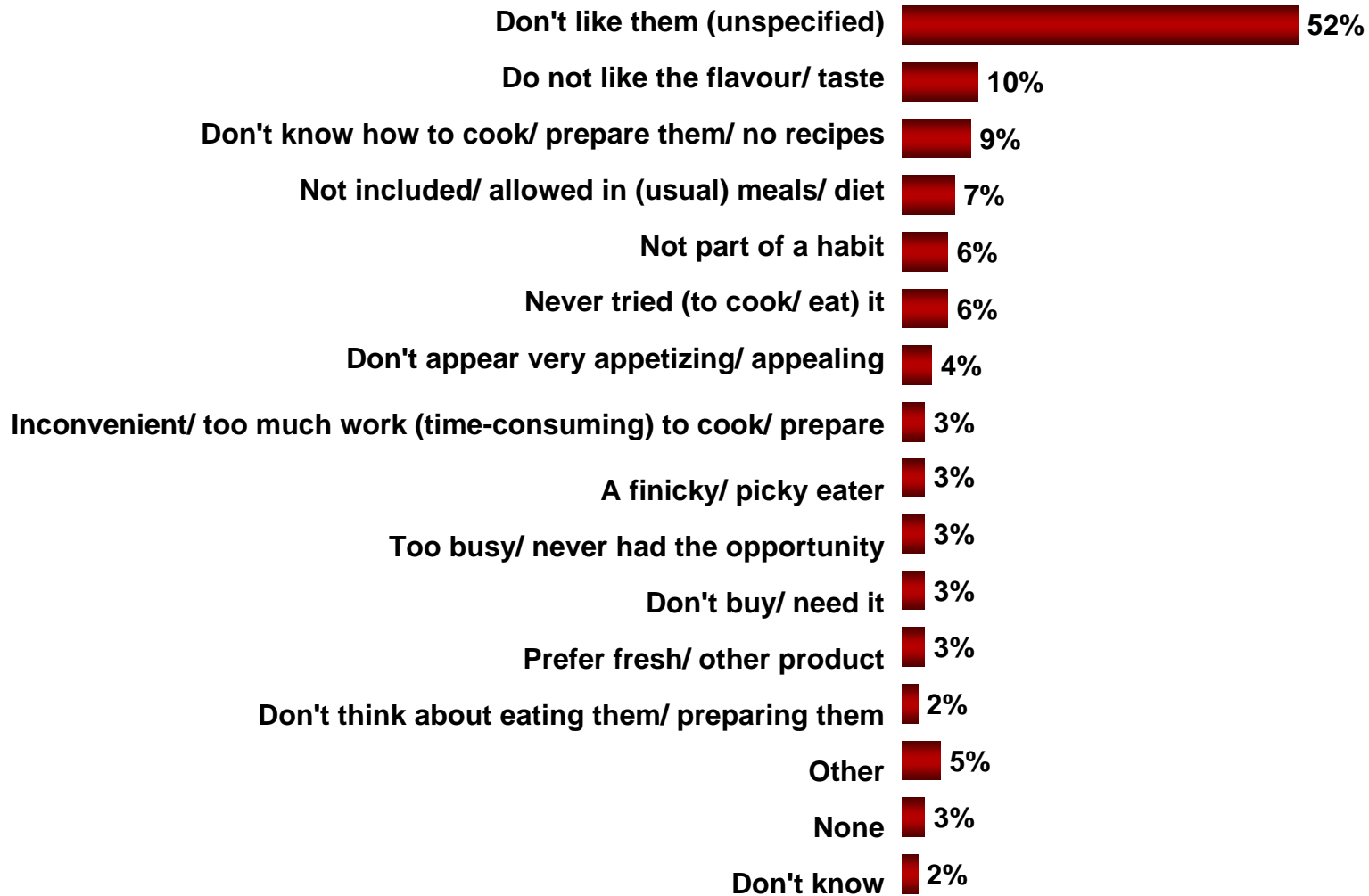




Reasons for Not Eating Pulses

Unexposed Reachables

Q21. What are the main reasons you do not eat pulses (dry beans, peas, lentils and chickpeas)?



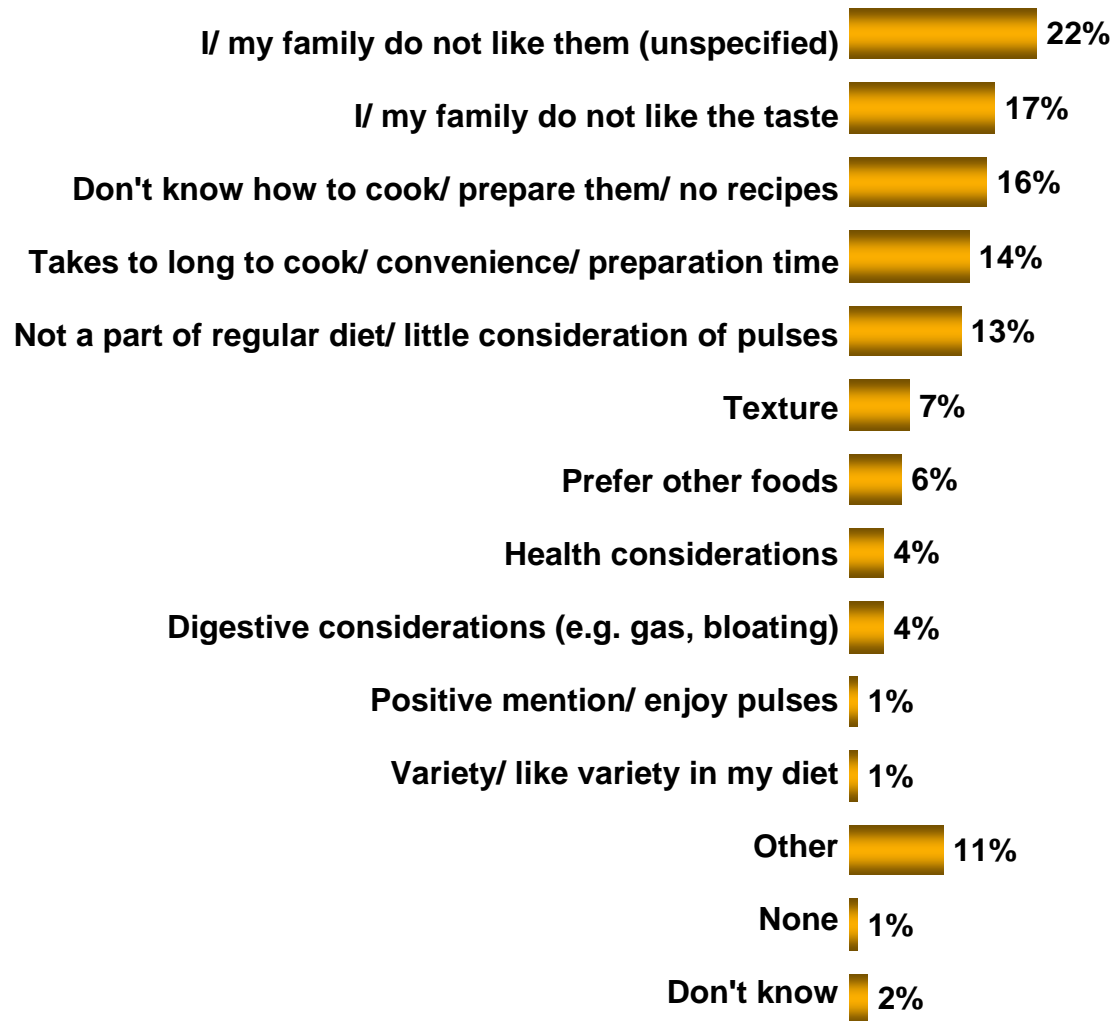
Base: Non-consumers (n=108)



Reasons for Not Eating Pulses More Often

Unexposed Reachables

Q23. What are the main reasons you don't eat pulses more often (dry beans, peas, lentils and chickpeas)?



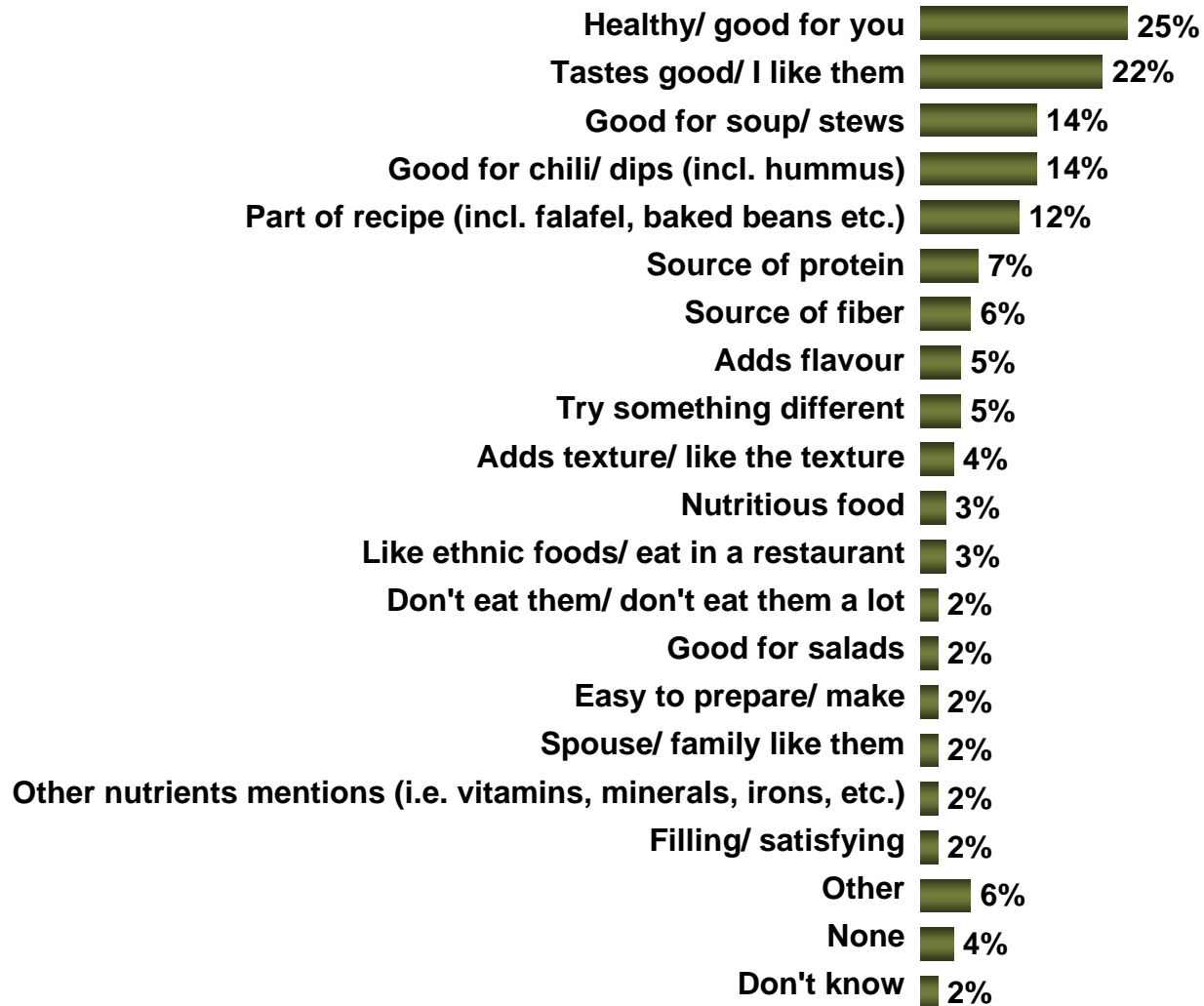
Base: Light consumers (n=133)



Reasons for Eating Pulses

Unexposed Reachables

Q22. What are the main reasons you eat pulses (dry beans, peas, lentils and chickpeas)?



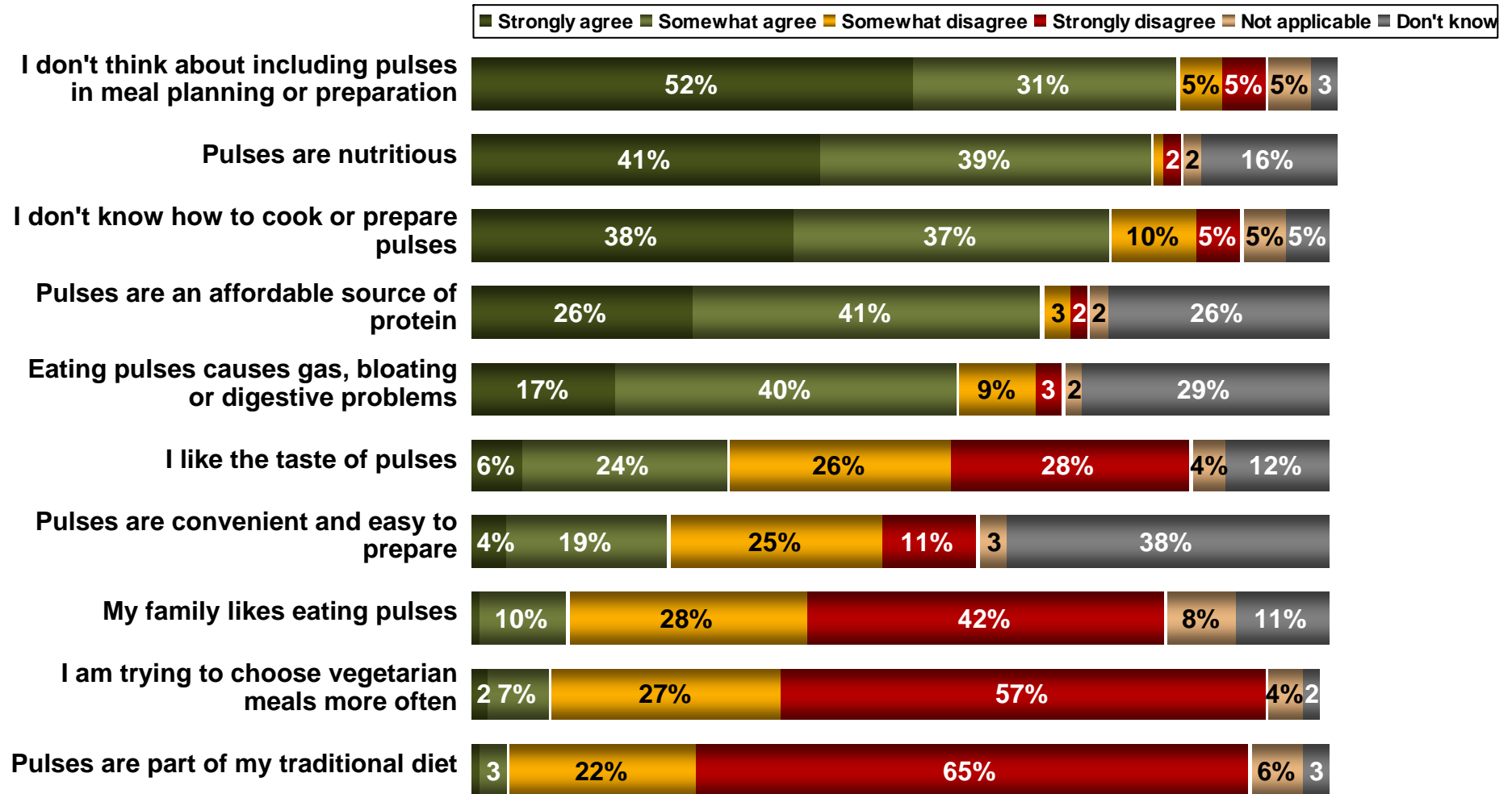
Base: Light, moderate and heavy consumers (n=142)



Attitudes Regarding Pulses

Unexposed Reachables

Q24. Please indicate your agreement or disagreement with the following statements.



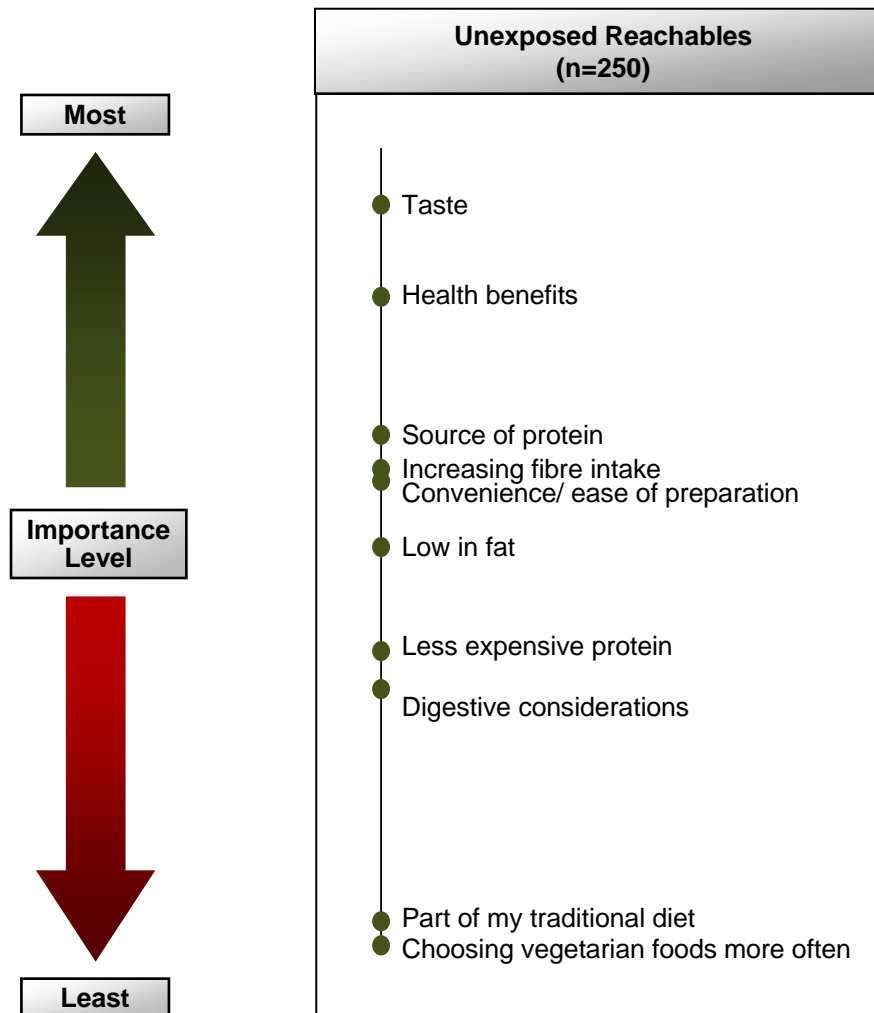
Base: All respondents (n=250)



Importance of Factors for Pulse Consumption

Unexposed Reachables

Q25. Which of the following factors is most important to you and least important to you when deciding whether or not to eat pulses?

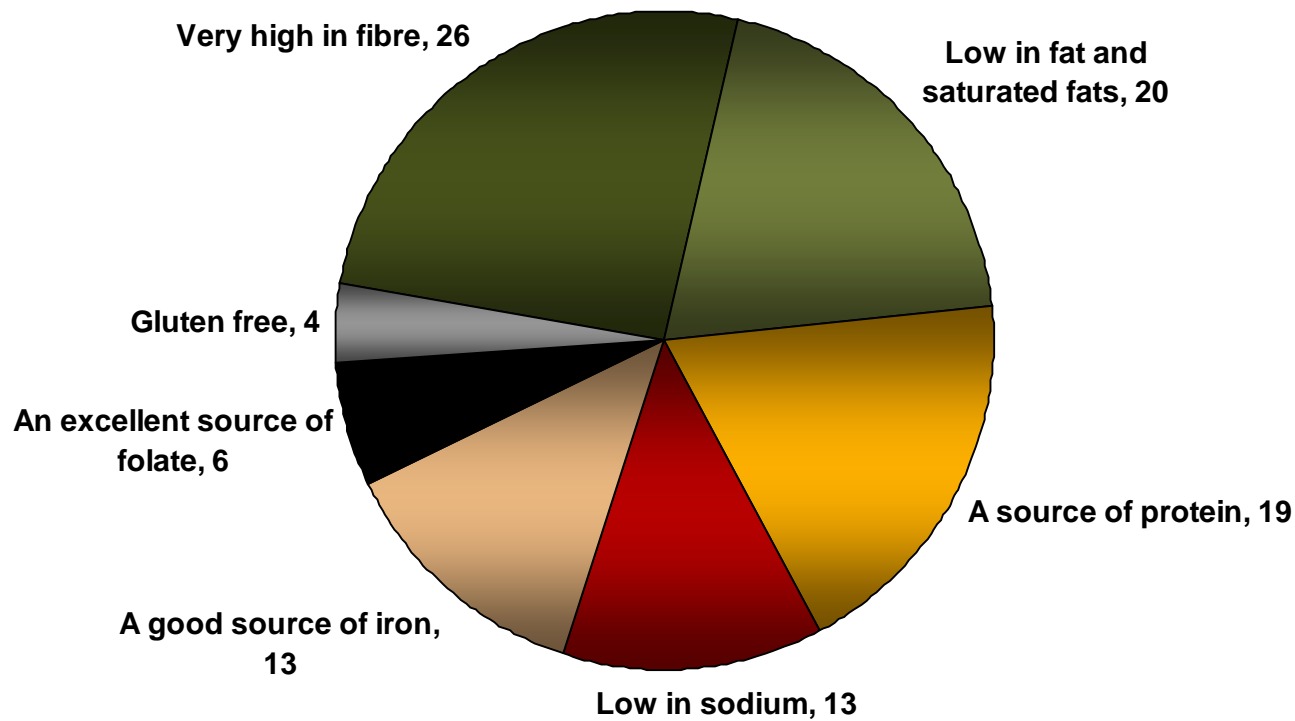




Nutritional Information Influencing the Purchase of a Processed Pulse Product

Unexposed Reachables

Q26. To what degree would each of the following factors influence your decision to purchase a processed food product containing pulses? The product could be a number of things such as pasta, crackers, cereal or a snack item. Please assume you have 100 points and can allocate 0 to 100 points to each factor.



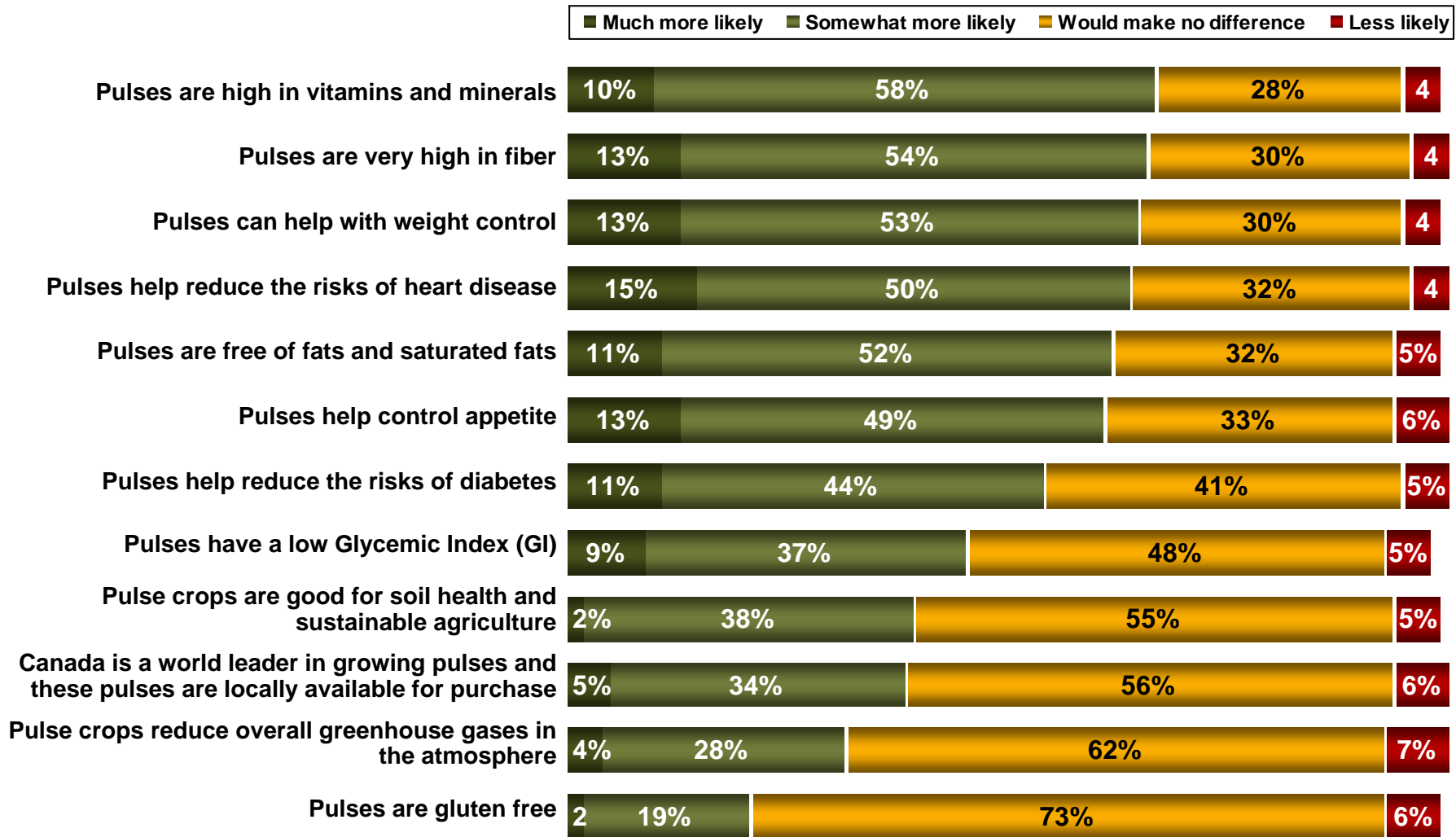
Base: All respondents (n=250)



Influence of Information on Eating Pulses

Unexposed Reachables

Q28. What follows are some facts about pulses, relating to personal health and the environment. Please indicate if knowing this information would make you more likely or less likely to eat pulses and pulse products.



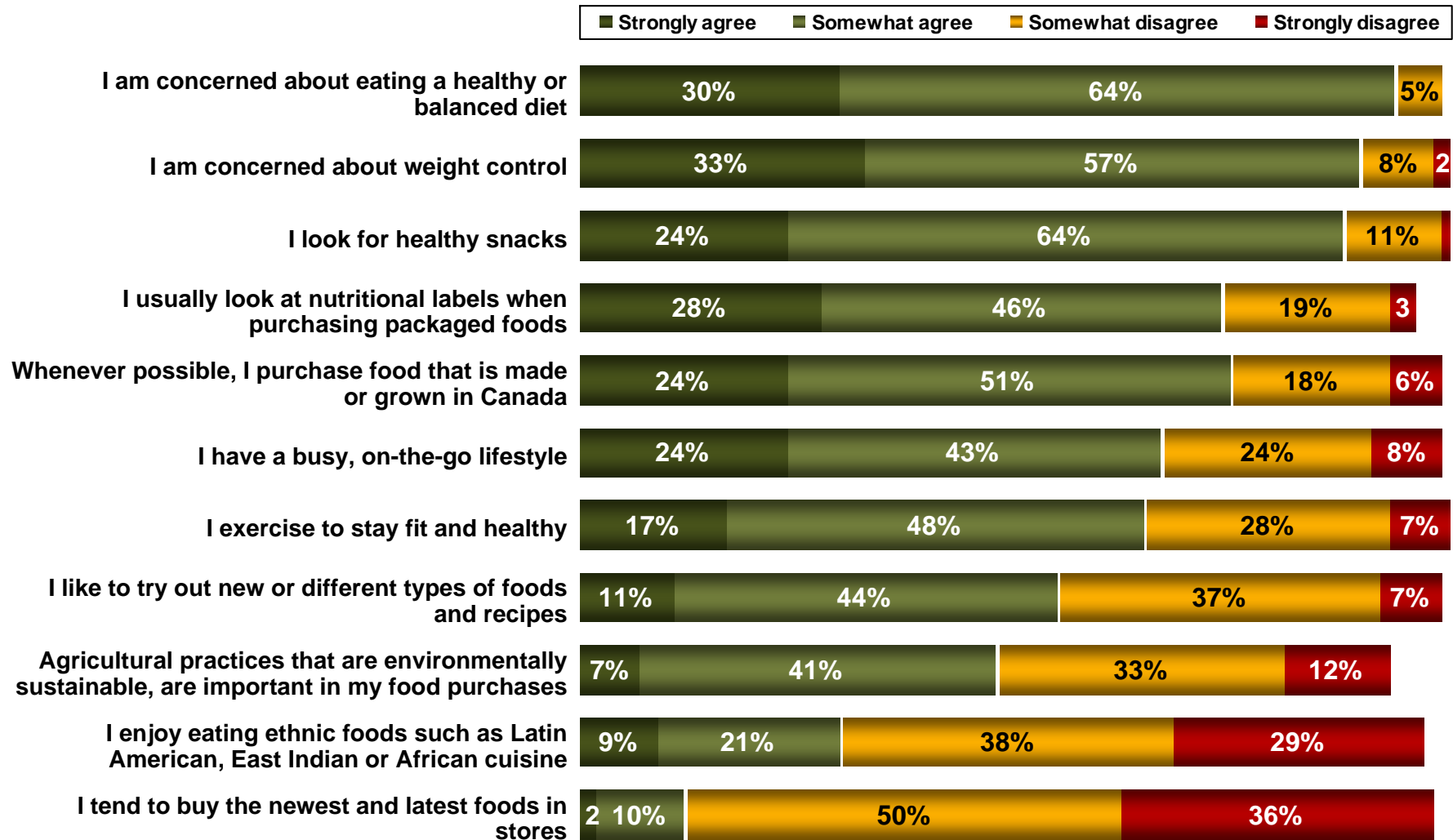
Base: All respondents (n=250)



Attitudes Towards Food and Health

Unexposed Reachables

Q27. Please indicate your agreement or disagreement with the following statements.



Base: All respondents (n=250)



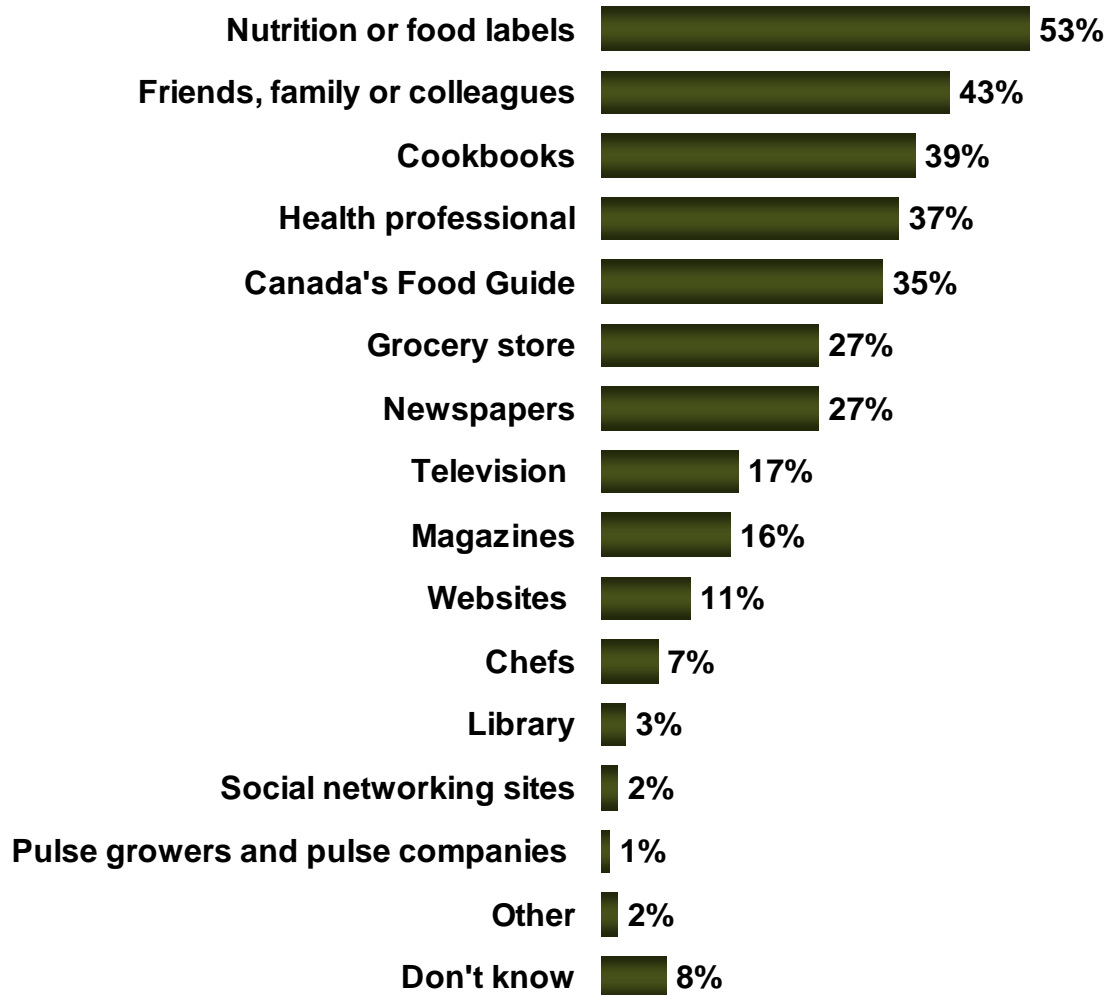
Pulse Consumption: Information Sources





Information Sources for Healthy Eating Unexposed Reachables

Q29. Where do you typically get your information on healthy eating?



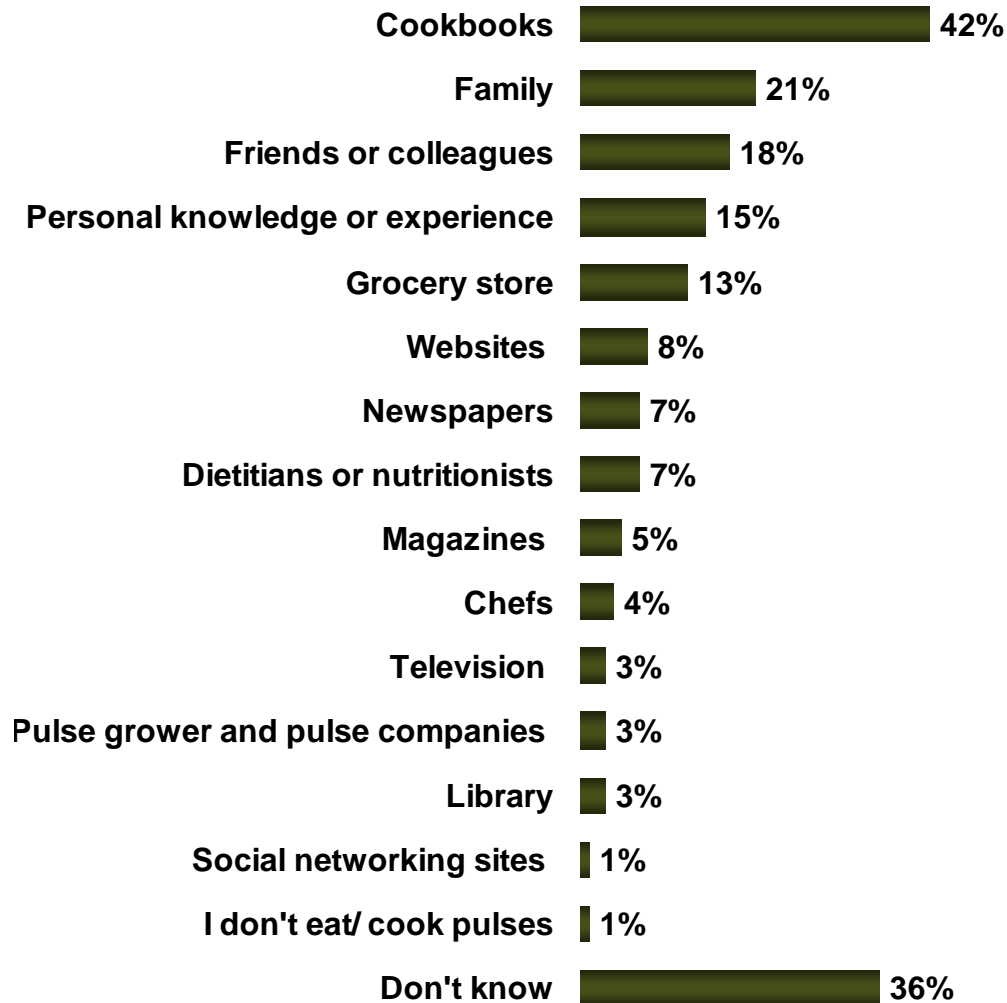
Base: All respondents (n=250)



Information Sources for Preparing Pulses

Unexposed Reachables

Q30. Where do you typically get your information about preparing pulses?



Base: All respondents (n=250)



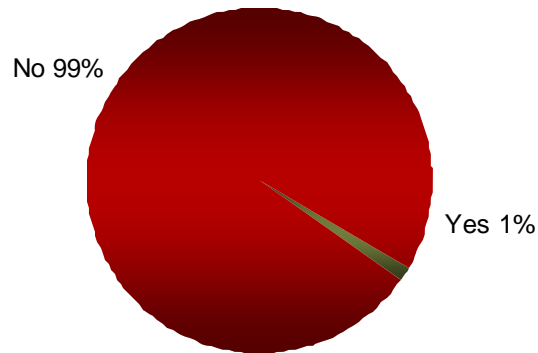
Respondent Characteristics: Health Profile and Demographics



Health Profile

Unexposed Reachables

Vegetarian or Vegan



Incidence of Disease

Heart disease or high blood cholesterol levels	25%
Diabetes	13%
Celiac disease	1%
None of the above	67%
Decline to respond	1%

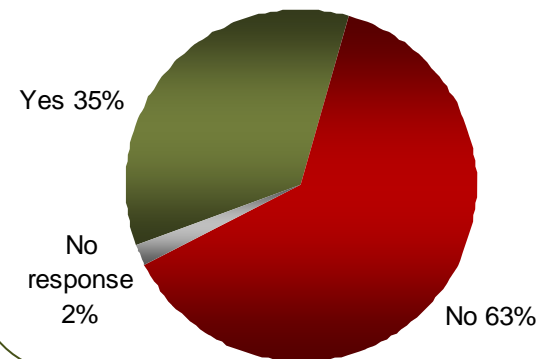
Reported Weight

For your height and weight would you say you are...?

Very underweight	0%
Somewhat underweight	3%
Average weight	45%
Somewhat overweight	44%
Very overweight	7%
Decline to respond	1%

Advised about Weight

Have you (or family members in your household) been advised by a health professional that your weight may cause health problems now or in the future?



Base: All respondents (n=250)



Tenure in Canada and Ethnic Background

Unexposed Reachables

Tenure in Canada

Born and raised	93%
More than 20 years	4%
11 to 20 years	2%
6 to 10 years	0%
5 years or less	1%

Base: All respondents (n=250)

Ethnic Background

As you know, we all live in Canada, but our ancestors come from many different ethnic backgrounds. What is the main background of your ancestors?

Canadian	36%
British	30%
European	25%
Aboriginal/First Nations	3%
Other	3%
Decline to respond	3%

Base: All respondents (n=250)

Age Left Country of Birth

Under the age of 12	24%
12 to 17	17%
18 or older	41%
Decline to respond	17%

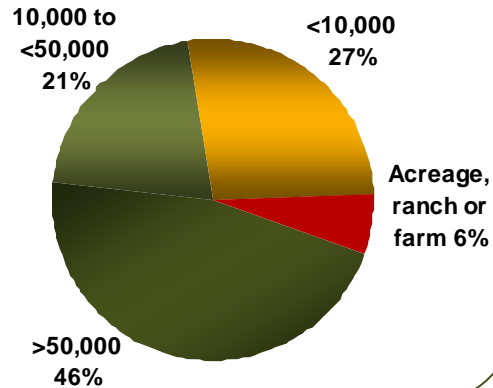
Base: Not born and raised in Canada (n=18)



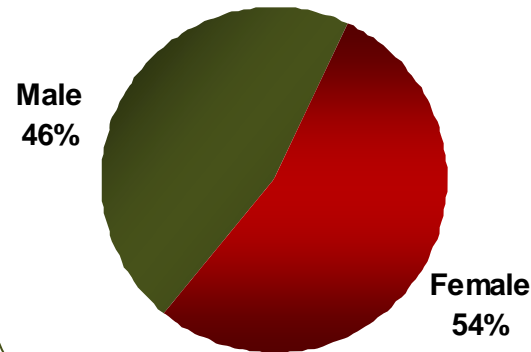
Demographics

Unexposed Reachables

Size of City or Town



Gender



Age

18 to 24 years	7%
25 to 34 years	25%
35 to 44 years	9%
45 to 54 years	25%
55 to 64 years	23%
65 years or older	12%
Decline to respond	0
<i>Mean</i>	<i>47</i>

Household Size

1 person	21%
2 people	43%
3 people	19%
4 or 5 people	17%
6 or more people	0%
Decline to respond	0%

Education

High school or less	29%
Some university, /college/ post secondary technical	22%
Graduated college/ post secondary technical	28%
Completed university undergraduate degree	18%
Completed university post graduate degree	3%
Decline to respond	0%

Income

Less than \$30,000	13%
\$30,000 to just under \$60,000	34%
\$60,000 to just under \$100,000	25%
\$100,000 or more	16%
Decline to respond	12%

Base: All respondents (n=250)



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