B.C. Agrifood and Seafood Domestic Consumption Study

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Research conducted for: BCStats

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Contents

REPORT CONTEXT

Background and Purpose of Project

Background

- Building the local market for B.C. foods is a key focus for the B.C. Ministry of Agriculture.
- This effort supports B.C. farmers, fishers, and food processors in capturing more of the local market by actively promoting B.C. products, taking advantage of the growing interest in local food.
- However, there is currently limited information available within B.C. that describes the key behaviours and motivations which drive consumers to buy local, making it difficult for B.C.'s agrifood and seafood businesses to develop an action plan.

Purpose

To support the government plan, this project was implemented with the following objectives:

- Identify consumer segments in B.C. that are currently purchasing local agrifood and seafood products;
- Determine what local agrifood and seafood products they are consuming;
- Uncover motivations for buying local agrifood and seafood instead of other competitive products;
- Assess where they shop for local agrifood and seafood products;
- Determine where key consumer segments are located in B.C.; and
- Gauge the degree to which these segments are influenced by different *"buy B.C. products"* messaging and promotions.

Project Scope

Defining *"Local B.C. Food"*

- For the purposes of this report, *"local B.C. food"* should be understood to mean agrifood and seafood products that are grown, raised, processed or manufactured in B.C., as well as prepared foods that feature ingredients from B.C..

Participants

- The participants of this study were B.C. residents that are 19 years old or older, who do at least some of the grocery shopping in their household and/or buy at least one of the following products at least once a month:
    - Unprocessed food products, such as fresh fruits and vegetables, raw meat, milk, eggs, raw fish and raw seafood;
    - Processed food products, such as breads, cookies, chips, granola, yogurt, jams, smoked salmon, juice, tea and beer;
    - Prepared meals, dishes or snack food from a restaurant, supermarket or other food service establishment to eat in, for delivery or to take out.

Regions

- This study was conducted to enable the analysis of four geographic regions:


Mainland / Southwest


Vancouver Island / Coast


Thompson / Okanagan / Kooteney


Cariboo / North

Methodology

Market Segmentation

- The results presented herein are based on a market segmentation. Its main input is the set of statements listed below, developed to capture drivers of people's behaviours when making food purchase decisions, reflecting their needs and product benefits sought.
- Participants in the quantitative survey were asked to rate their level of agreement with these statements in a four-point scale.

THEMES	STATEMENTS
Fresh, Safe Food	I choose where I shop for food based on how fresh the products are
	I am concerned about the safety of the food I buy
Label Reader	I read product labels to determine where my food comes from
	I always read the ingredients label when I buy food
Socially Conscious	I try to support the local economy through my food purchases and eating practices
	I try to support positive social impact with my food purchases
	I try to minimize my carbon footprint through my food buying practices
	I seek to learn the story and the values behind the products I buy and the brands I support
Low Prices	I shop for items that are on sale or that I have a coupon for
	Price is a main concern when I shop for food products
Exotic, Flavourful Foods	I love trying exotic food products and unique flavours
Easy to Prepare Meals	I always look for convenient, easy to prepare meals
Specialised Diet	I regularly shop for food that suits a specialized diet
On the Go Snacker	I'm always eating on the go
	I often replace regular meals with snacks

See the appendix for additional detail on the methodology

Key Takeaways

Market Overview

- There is a strong potential to grow the resident market for B.C. food products
  - When purchasing food, B.C. residents are strongly influenced by their interest in supporting the local economy (80%), and the desire for food that is fresh (79%) and safe to eat (77%). All these are factors strongly associated with *local food*, and therefore main drivers of B.C. product purchases that can be leveraged.
  - While food staples, such as eggs, fresh fruits and vegetables, and milk, are the most likely products to be sourced locally, there is a market for emerging and gourmet products, such as raw fish and raw seafood, alcoholic beverages, and snack foods, that needs to be cultivated.
- Diversification of the distribution channels offers opportunities, but more complexity
  - While residents are buying B.C. products primarily from mainstream channels, a diversification is taking place, with nearly 60% buying local products at specialty stores, 65% at farmers' markets, and a non-trivial proportion using emerging channels, such as convenience stores, subscription services, and delivery services. This trend, observed in the unprocessed, processed and prepared food markets, creates more opportunities, but potentially more complexity for producers and distributers to handle.
- The appropriate initiatives could entice residents to purchase more B.C. products, more frequently
  - Residents would be more inclined to buy B.C. products more frequently if offered competitive prices and promotions (93%), if products were easy to identify through store signage and product labeling (89%) or through a broadly recognizable "From B.C." seal (83%), and if more information about when products were produced, their origin, their ingredients, and the production method was available (87%).
  - From a marketing perspective, in store initiatives are the most effective method to reach residents regarding local products. However, sharing positive product experiences and product information through social media and television may have an addition, though modest, impact on purchase consideration.

Key Takeaways

Market Diversity

- A total of ten market segments offers B.C. producers varying levels of opportunity to pursue.
  - Five high potential segments, representing 50% of all shoppers, include individuals who are concerned about the freshness and safety of the food products they buy, and care about the ecological, economic and/or social impact of their purchases. They attribute a high benefit to consuming B.C. products and purchase many of them frequently.
  - Five moderate potential segments, representing another 50% of all shoppers, include residents that are more likely to be driven by factors such as price and convenience when purchasing food products. Their purchases of B.C. products are less frequent and limited to fewer categories.
  - Across the segments within each of these two groups, differences in preferences for specific products, need for variety, convenience and information, or level of dietary constraints create a wide range of opportunities for local producers and distributors to pursue.
- While all segments are present in all B.C. regions, regional differences may require distinct strategies.
  - The Vancouver Island/Coast and the Thompson/Okanagan/Kootenay regions include a higher proportion of individuals who have a high interest in premium local food , and are unconcerned about price.
  - The Mainland/Southwest region includes the highest proportion of individuals who are looking for convenience and affordability, regularly buying prepared food, particularly from supermarkets and convenience stores.
  - The Cariboo/North region, while containing a significant proportion of high potential segments, also has a higher concentration of price-sensitive segments, who are not naturally inclined to look for B.C. food products.
  - Such differences may require different approaches and effort level to reach specific targets.

MARKET OVERVIEW

What Drives Food Shopping Behavior

- When choosing what food products to buy and where to buy them, B.C. residents consider multiple factors.
  - Residents are concerned about the freshness and safety of the food they buy, and choose to shop at places they trust in this regard. Over 60% value product information and read product labels to learn about its origin and ingredients.
  - Supporting the local economy is important to residents, and affects their purchases. Over 2/3 of them also try to support positive social impact, such as fair trade, environmentally safe, humane practices, with the purchases they make.
  - Price is a main concern for many, and they shop for items that are on sale or that they have a coupon for.
  - Preferences and circumstances vary, however, with some indicating a taste for exotic, flavorful foods, adherence to a specialized diet, or specific eating behaviors that also influence their food purchase choices.

Drivers of Food Shopping Behavior

Why People Buy B.C. Food Products

- B.C. products address some of the main concerns residents have when buying food products.
  - They are perceived to be fresher, healthier and safer than products coming from elsewhere, and they address residents' interest in supporting the local economy.
- While residents praise their variety and quality, B.C. products are not always available or easy to find.
  - In qualitative commentary, residents indicate that the food is not always properly labeled, making it difficult to know its origin. While packaged goods labels may read *packaged* or *processed* in B.C., the origin of the ingredients is unclear.
- B.C. products are also perceived to not always offer the best value for money, leading residents to turn to products from elsewhere.

PRIDE IN B.C. PRODUCTS

"I would definitely tell them about are fruit and vegetables. I would tell them about how awesome our fresh salmon is and I think we have some of the best produce around."

FRESHER, HEALTHIER, SAFER

"Food from B.C. is grown in a clean environment. Looking at the province and how natural and fresh and unpolluted the areas are ensures that any food grown and raised here will be of the same cleanliness. And the regulations are better than other areas of the world."

SUPPORTING THE LOCAL ECONOMY

"I also try to buy local foods from my province, before buying those from another area. I think it is important to support businesses in your area."

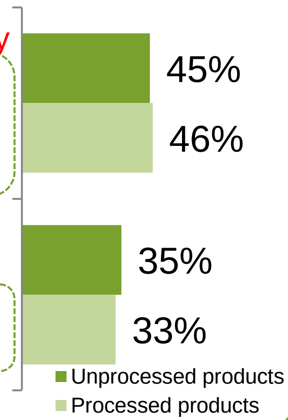
Reasons to buy food products from outside B.C.

Easier to find / better availability

"If the foods were diverse enough and the stamp (indicating location) was extremely visible, I would be buying ALL B.C. produce and processed"

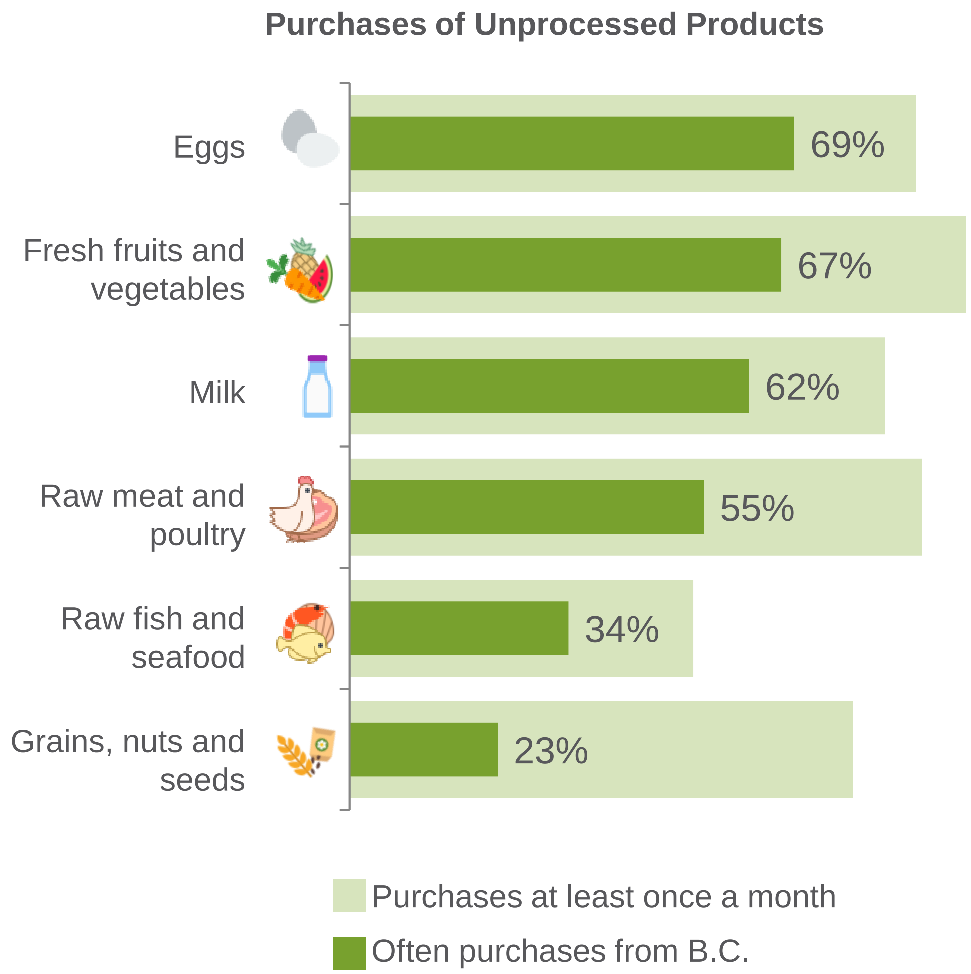
Better value for money

"Give it a sale price at first. That would be appealing"



What B.C. Food Products People Buy

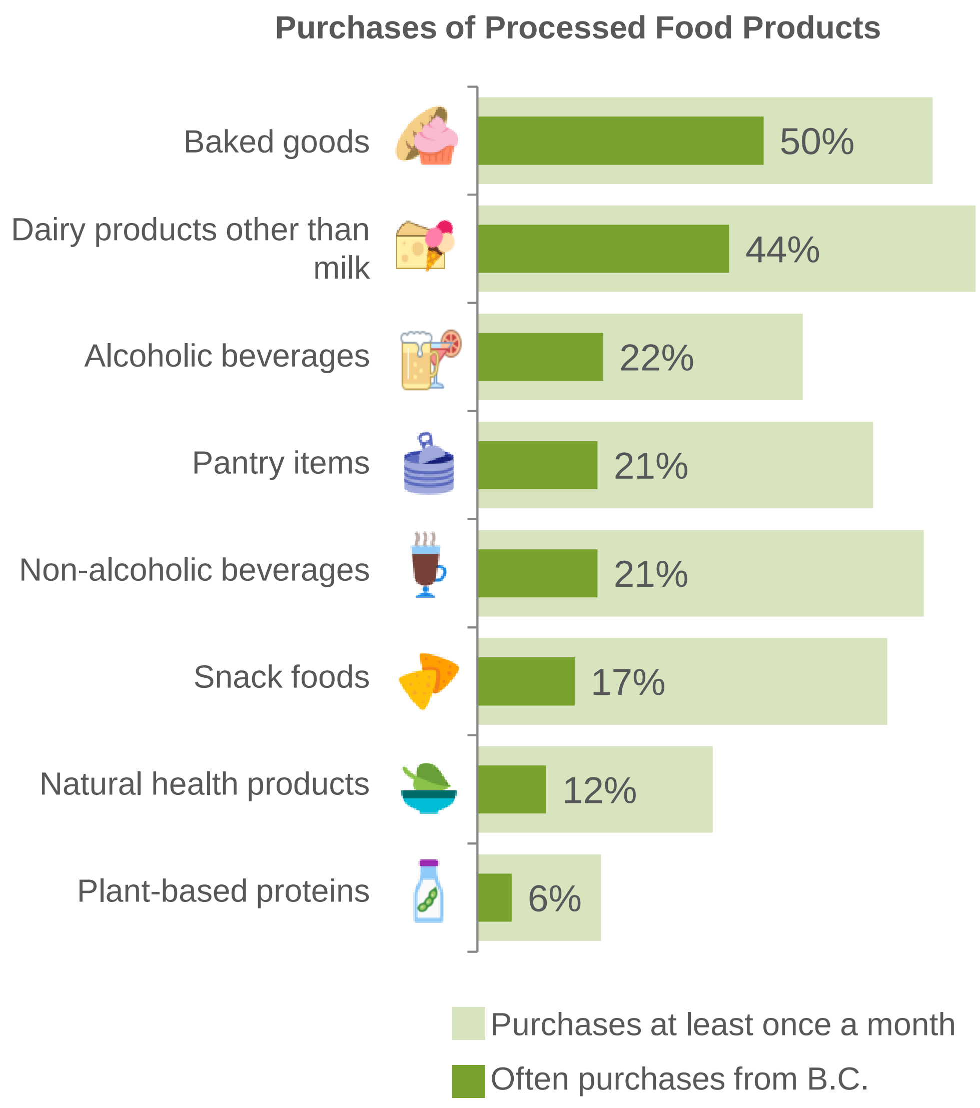
Unprocessed Food



- Unprocessed food staples are the most likely products to be locally sourced.
    - Eggs, milk, and fresh fruits and vegetables are products that most residents source locally.
    - Purchases of B.C. raw meat, poultry, fish and seafood are not as frequent, but represents over 60% of the total demand for each of these types of products.
    - Grains, nuts and seeds are very unlikely to be sourced locally, even though residents consume these products frequently.

What B.C. Food Products People Buy

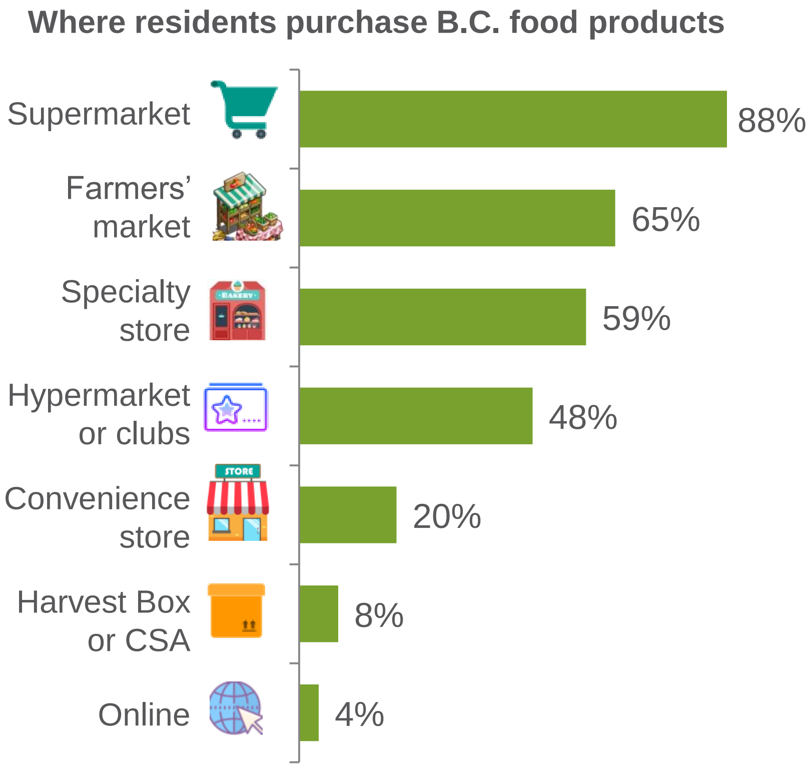
Processed Food



- B.C. processed food products have a more limited reach among residents.
  - Baked goods and dairy products are the two product categories that account for most of the purchases of B.C. processed foods, each representing over 50% of the total demand for the respective product category.
  - B.C. alcoholic beverages are not purchased as frequently, but represent nearly 40% of the total demand for alcoholic beverages in the region.
  - All other processed food products are seldom sourced locally by those who consume them.

Where People Buy B.C. Food Products

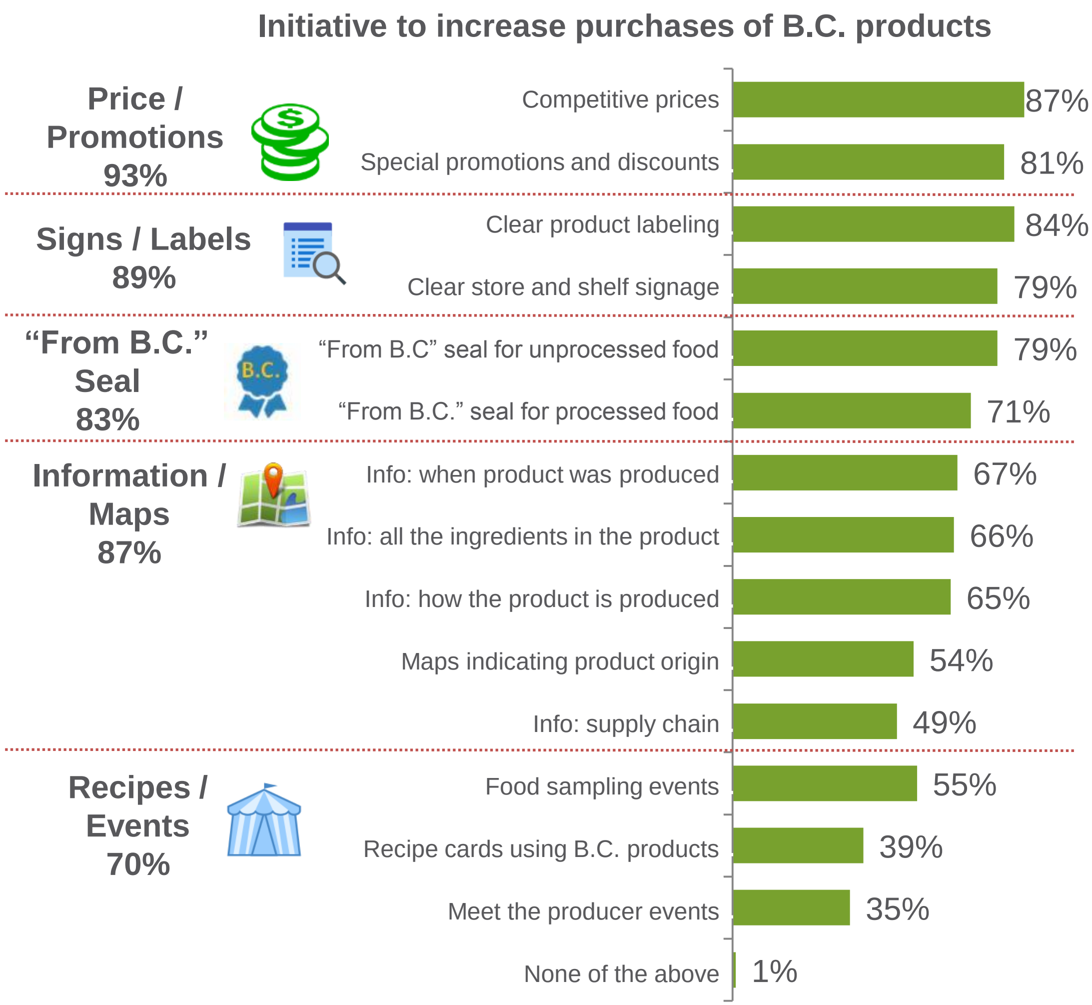
Unprocessed and Processed Food



- Most B.C. residents are buying B.C. unprocessed and processed foods primarily at supermarkets.
  - Qualitatively, residents have indicated that some supermarkets offer a rather large, well marked section dedicated to clearly labeled B.C. products, which makes them easy to find.
- Nonetheless, other channels play a significant role in making B.C. products available to residents.
  - Farmers' markets are one of the go-to options for residents, who see in this channel an easy way to know the food origin, the possibility to learn more about the producers and their values, and a more direct way to make an impact in the local economy.
  - Specialty stores also have a high appeal, and may be perceived to offer somewhat similar benefits to those of farmers' markets.
  - Hypermarkets and convenience stores also offer B.C. products, each with a different proposition, catering to the needs of specific market segments.

Incentives to Buy More B.C. Food Products

Unprocessed and Processed Food



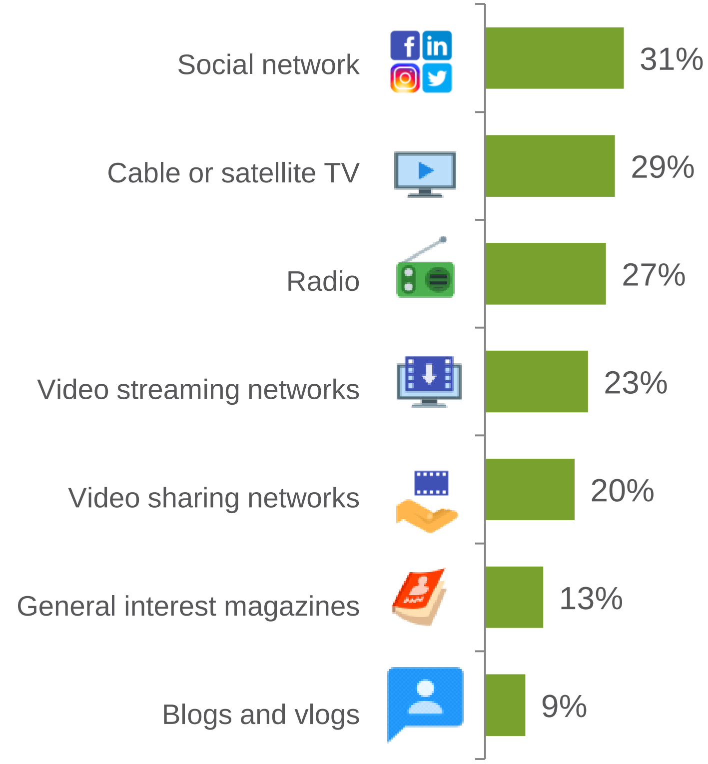
- Producers and distributors can leverage many initiatives to increase the purchase of B.C. products.
  - Virtually all residents would buy more B.C. products if prices were competitive or special promotions were offered.
  - Even more so, if clear product labeling and in-store signage made these products easier to locate.
  - In particular, an easily recognizable seal indicating that a product is "from B.C." would simplify the search, driving most residents to buy more local products.
  - Information about where the product was grown, raised or produced, when it was harvested or produced, and all the ingredients it contains would address freshness and safety concerns, also increasing purchases.
  - Recipes and food sampling, or meet the farmer events might be appropriate for a smaller segment of the population.

Incentives through Marketing Efforts

- Experience and product information sharing through social media and television would have the best results, after in-store initiatives, incentivizing B.C. residents to try and buy more B.C. food products.
  - Residents indicated that they are most likely to be influenced to try B.C. food products if they heard about positive experiences with it. Articles about product benefits and the producers and their stories also garner some interest.
  - Social media and television have the highest, though modest, reach. Qualitative discussions yielded that many decisions are made at time of shop, so initial focus on in store promotions are key.

Likely to try B.C. food product based on …

Likely to notice ads on …

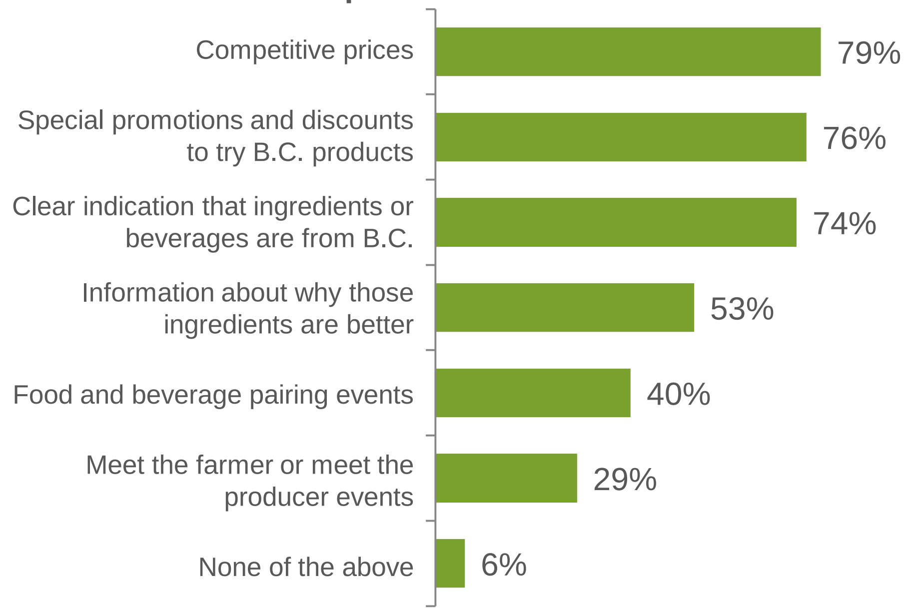


B.C. Products in the Prepared Food Market

- The overall market for prepared food in B.C. is significant.
  - Nearly two-thirds (66%) of residents buy prepared food at least a few times a month; one-quarter (25%) buy it a few times a week.
- However, the demand for B.C. products in this market is still limited.
  - Residents are unlikely to choose to go a restaurant because it uses B.C. ingredients to prepare its meals.
  - While at the restaurant, residents are more likely to order an alcoholic beverage from B.C. than to order a meal featuring B.C. ingredients
- Some initiatives may drive purchases up
  - Competitive prices and promotions, combined with a clear indication of product origin in the menu could increase the propensity of residents to purchase B.C. products at restaurants

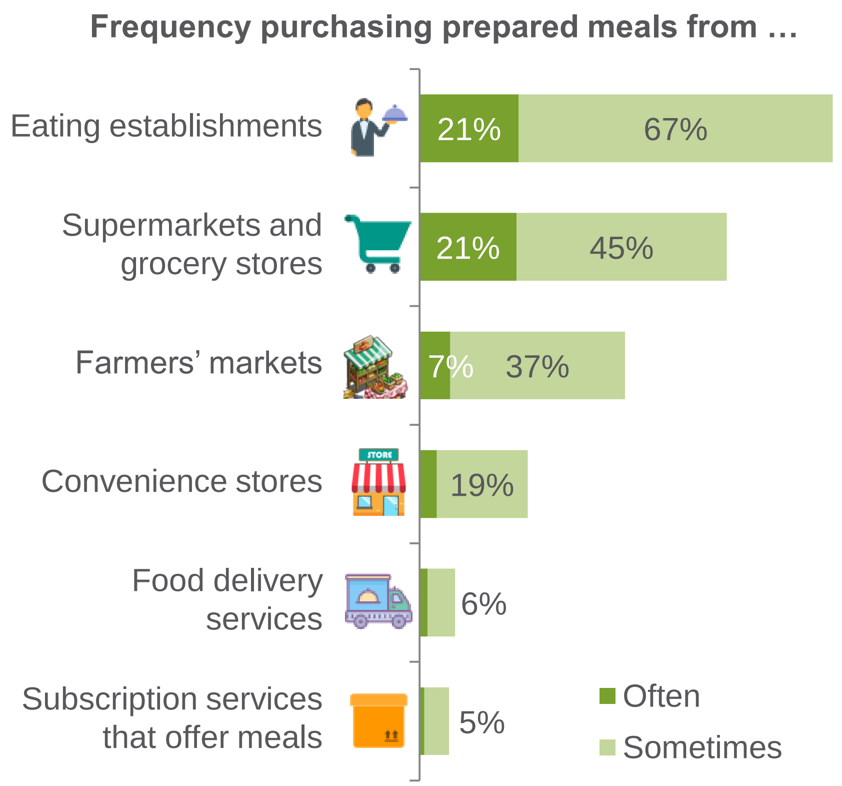
Choices of B.C. products when eating at a restaurant

Initiative to increase choice of B.C. products at restaurants



The Prepared Food Market Channels

- While eating establishments such as restaurants, cafes, pubs and food trucks, are residents' primary source for prepared food, other channels compete in this space.
  - Many residents are purchasing prepared meals at supermarkets and grocery stores, which are becoming a strong competitor to restaurants, in some cases offering sit-down service with waiters and bar service (grocerants).
  - Farmers markets, catering to the need for "fresh" and "local" offer producers the option to take their products "from farm to table".
  - Convenience stores and delivery services cater to those always on the go, seeking for convenience at affordable prices.
- This diversification creates complexity and concern for some, but does open new opportunities for producers.



THE MARKET SEGMENTS

Segments Overview

- A total of ten segments, with varying levels of opportunity for B.C. food producers to pursue, were identified through the analysis, and are detailed over the next few pages:

High Potential Segments – 50% *of all food shoppers*

Include individuals that are concerned about the freshness and safety of the food products they buy, and care about the ecological, economic and/or social impact of their purchases. They attribute a high benefit to consuming B.C. products and purchase many of them frequently.

Premium Food Seekers

12% *of all food shoppers*

Healthy Meal Cooks

8% *of all food shoppers*

Convenient Local Meal Proponent

8% *of all food shoppers*

Socially Conscious Adventurers

9% *of all food shoppers*

Fresh, Natural Eaters

12% *of all food shoppers*

Moderate Potential Segments – 50% *of all food shoppers*

Include residents that are more likely to be driven by factors such as price and convenience when purchasing food products. Their purchases of B.C. products are less frequent and limited to fewer categories.

On the Go Label Readers

8% *of all food shoppers*

Selective Snackers

9% *of all food shoppers*

Price Conscious Foodies

11% *of all food shoppers*

Subsistence Eaters

9% *of all food shoppers*

Kitchen Strangers

12% *of all food shoppers*

PREMIUM FOOD SEEKERS

Wendy Jones*

"I will always tend toward local organic and non GMO when it is available even if it is a little more expensive."

WHO I AM

Boomer, no children at home, higher than average income
Looks for high quality, interesting food and price is not a concern

I'm 53 years old and I work full time. My children have just left home, so it's just me and my dogs, living on Vancouver Island. My favourite food is moose meat and home grown potatoes. I grew up on mostly wild meat and garden vegetables. I do like to experiment with food, so I often use various kinds of Thai, Szechuan and Vietnamese spices to get bold flavours.

WHY I BUY LOCAL

B.C. products are fresher, of better quality, better for the environment and the local economy

To me, local food means less environmental impact and more nutrition, as produce can be picked when they are ripe. I know that they haven't been sprayed, and the farm isn't using chemicals that impact our watershed. I assume that they are responsibly grown. Prepared food could be "local", as well, if all the ingredients are properly sourced. I love supporting a farmer who takes their product from farm to table.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD

Clear, legitimate labels, more product information

Many of the places where I live promote their local items with signs and labels, making it easy for people who want to buy local to find what they are looking for. If products are labeled "from B.C.", I will pick them over the alternative. My only concern is food being labeled "local" for marketing when it is not in fact local. Product information would also be helpful, because I'm more interested in non GMO and organic food.

* Fictitious character used to represent the segment

PREMIUM FOOD SEEKERS

Wendy Jones*

12%	81%	37%	20%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY

All categories of processed and unprocessed food products

I always buy B.C. products. Most of my veggies are from B.C.; so are frozen fruits that are available year round. Bread is from Portofino bakery. I will not compromise on seafood, eggs and meat products. They have to be from close to home where I know the conditions they were raised in. I often buy B.C. wines, which I enjoy.

WHERE I BUY B.C. FOOD

Supermarkets, farmers' market, specialty stores and harvest box services

I often go to this store that carries a vast selection of local products including eggs, meat, dairy, seaweed and processed items like baked goods, local tea, coffee... I could live out of that store alone, but it is expensive. I believe their suppliers are paid fairly, which is important, and that higher price is passed on. When I do go out, I often go to places that offer local food, or order meals that feature local ingredients.

HOW I CAN BE REACHED

Word of mouth, articles about farmers and product benefits

I'm very much in tune with the local products scene, and we are always exchanging information about new products or places that may become available. I enjoy reading articles about farmers and their values, and about the benefits of various products. I find those very helpful.

High end, natural, organic products, associated with positive social impact have appeal.
Make products easy to identify and be transparent about production processes and brand values.

* Fictitious character used to represent the segment

HEALTHY MEAL COOKS

Johanna Williams*

"I'd rather always eat fresh food, but that's not always possible. In the summer I get together with a couple of friends to can or freeze as much fruit and veggies we can for the winter time."

WHO I AM

Boomer, no children, lower income
Looks for fresh, safe ingredients to prepare healthy meals

I'm 66 years old. I live in 100 Mile House with my husband of 42 years. We eat mostly home cooked meals, with the odd meal out, because those are expensive. I like to cook food that I know where it came from and how it was prepared. I have my garden for most of the year and most of the meat I buy comes from farmers I know.

WHY I BUY LOCAL

B.C. products offer better quality, are better for the environment, and their origin is known

I equate local food to greater nutritional value and flavor. Buying local is good for our health, good for the economy and good for the environment. It means I know where my food is coming from, and based on our regulations it would hopefully be safe. However, price is sometimes an issue, so I look for affordable options.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD

Clear, legitimate labels, product information, competitive prices

It is important to make products easy to find and to make information about the product and the producers available. It is hard to find "made in B.C." labels in products. Sometimes I decide not to buy something because I don't know where it comes from. Those stands that offer free product samples and recipes also appeal to me.

* Fictitious character used to represent the segment

HEALTHY MEAL COOKS

Johanna Williams*

8%	68%	35%	7%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY

All product categories, except plant-based proteins

I like to support local farmers as much as possible. I buy produce that we can't grow ourselves or that don't freeze well. I buy range free eggs from a neighbor. When we can we buy dairy products from Dutchman dairy at a store that carries their products. Sometimes I buy local meats and fish, although we don't eat those much.

WHERE I BUY B.C. FOOD

Supermarkets, farmers' market, specialty stores and harvest boxes

I enjoy buying at the farmers' market because you get to know the people who are selling to you. For dairy products I sometimes go to specialty stores when I am in Kamloops visiting family. During the winter I go to the supermarket, but I find that in big stores they have country of origin printed small and it's hard to find local products.

HOW I CAN BE REACHED

Word of mouth, articles about farmers and product benefits

I think more, better advertisement of B.C. products is needed. Things like articles about the benefits of local products, or about the producers and their values. I would be more likely to notice those on TV or on the radio, but social media advertising may be the best to reach the broadest range of people.

Focus on product safety and nutritional value.
Provide information about product origin and benefits in store or via traditional media.

* Fictitious character used to represent the segment

CONVENIENT LOCAL MEAL PROPONENT

Karen Valliere*

"My favorite meal is salmon with fresh vegetables – all from B.C. It is fresher, easy to prepare, and it supports our local economy."

WHO I AM

Boomer, single, lower income
Looks for meals that are easy to prepare, tasty and healthy

I am 62 years old and I've have lived in B.C. for a long time. Right now live on my own and work part time. When I was raising my family I used to cook a lot and prepare elaborated meals. Now I look for meals that are tasty, healthy and easy to prepare.

WHY I BUY LOCAL

B.C. products are fresher, offer good value for money, and their origin is known

I buy everything possible grown or raised in B.C. because it is fresher, it tastes better and I want to support our growers. There is also the benefit of more strict regulations about how things are grown here. I can trust that the food is safer.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD

Legitimate, clear labels, product information, competitive prices

I think clear labeling is very helpful to people who want to buy B.C. food. A logo to identify B.C. products would make it even easier for people notice how many B.C. things they can actually buy. The more "in your face" the products are the better chance of getting people to start thinking about B.C. first and foremost.

* Fictitious character used to represent the segment

CONVENIENT LOCAL MEAL PROPONENT

Karen Valliere*

8%	77%	49%	25%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY
All categories of processed and unprocessed products

I buy most of my fruit from local sources, except when they are out of season. Dairy products, meats, baked goods, even grains or pantry items I try to buy from B.C. if I can find it. I also only eat B.C. wild salmon. It is more expensive, so I don't buy it often, but it is worth it when I do.

WHERE I BUY B.C. FOOD
Supermarkets, farmers' market, specialty stores and convenience stores

The farmer's market is a favorite place to go for local food, but I'm pleased to say that Costco, Superstore, and Save On Foods all also have local foods clearly labeled. Other than the farmer's market, I find that Save On Foods has the best fresh produce, with stands set up devoted to local companies. When I do go to a restaurant, I at times order dishes that feature B.C. ingredients.

HOW I CAN BE REACHED
Word of mouth, articles about farmers and product benefits on traditional media

I do listen to recommendations my friends might have of products to try, or places to eat out. I'm also very interested in articles about the people who grow our food, and the benefits of various food items. I'd be more likely to notice ads on cable TV, on the radio, or in magazines. I don't spend a lot of time with new technology.

Focus on convenience, flavor and health value.
Make products easy to identify, price competitive, and available through channels that cater to convenience.

* Fictitious character used to represent the segment

SOCIALLY CONCISOUS ADVENTURERS

Bill Ignace*

"To me local food means less time from farm to table, less fuel required to transport, more non-GMO products, and knowing the values of those who produce the food I eat."

WHO I AM

Gen X, with children at home, average income
Looks for adventurous food, with a specialized diet

I'm 45 years old, married and have a son. I like to try new foods, but I am sensitive to food additives and eat as much natural food as possible. I eat very little processed food and read the ingredients on every packaged item that I pick up to see what it contains. I can be a snacker, but I always have lots of fruit, nuts and veggies on hand, so that I can snack on something that's not too bad for me.

WHY I BUY LOCAL

B.C. products offer good value for money, are of better quality and better for the environment

I try to buy food from B.C. because when you buy close to home you tend to get a fresher product, that is better for the environment, and you are more likely to learn about who produced it and how it was produced. It is good value for your money.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD

Competitive prices, clear labels, information on how product is grown

Product identification and detailed information right in the store would definitely encourage me to try them. However, I would not want to increase packaging on individual products for this purpose. A logo identifying BC products would probably be the least additional cost to the environment.

* Fictitious character used to represent the segment

SOCIALLY CONSCIOUS ADVENTURERS

Bill Ignace*

9%	79%	49%	24%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY

All categories of unprocessed and processed products, except snacks

B.C. offers an excellent variety of agricultural products that I enjoy. Fresh fruits and vegetables are a must. The seafood, eggs, meat are of excellent quality. There are some beautiful wines that I like to buy every now and then. When we do go out to a restaurant I will often choose a place that features B.C. ingredients in their meals.

WHERE I BUY B.C. FOOD

Supermarkets, specialty stores and farmers' markets

My favorite place to buy B.C. food would actually be the fruit and veggie truck that comes in during the summer and fall, because the lady who runs it is very specific about where she gets the produce and whether it is non-GMO. My next favorite place is Quality Foods, with Safeway close behind it.

HOW I CAN BE REACHED

Word of mouth, articles about product benefits, traditional media

I'm most likely to notice ads in traditional media, such as cable TV, radio, or magazines. Articles about famers, their products and their benefits would be of interest.

Focus on exotic flavor, dietary needs, and brand values.
Make products easy to identify and provide information about product benefits and ingredients.

* Fictitious character used to represent the segment

FRESH, NATURAL EATERS

Patricia Sessio*

"All fresh food – meat, vegetables, fruit – is expensive today, but it is important to eat healthy, safe and nutritious food."

WHO I AM

Boomer, no children at home, average income
Looks for healthy, safe, nutritious

I am a retired 72-year-old woman, living in Burnaby with my husband of 49 years. I'm often with my children and grandchildren, and I enjoy cooking for them. We seldom eat in restaurants. I'm very careful sourcing ingredients for our meals and that means knowing what is in it and where it comes from.

WHY I BUY LOCAL

B.C. products are fresher, of better quality and better for the environment

I always read the labels of the food I buy. Sugar and sodium content is always a concern. I am also influenced by where the food comes from, and would rather buy local products. They are fresher, of better quality than imported ones, and better for the environment, because they don't travel far.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD

Competitive prices, clear labels, product information

I choose foods from B.C. whenever possible but there either needs to be more products from B.C. or better signs, so I can find them.
Of course, prices have to be competitive, and I need information about what is in it.

* Fictitious character used to represent the segment

FRESH, NATURAL EATERS

Patricia Sessio*

12%	75%	40%	13%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY
All product categories, except plant-based proteins and grains, nuts and seeds

I buy a variety of local products. It is easy to shop for fresh fruits and vegetables where we live. We also have nice specialty meat and cheese delis, bakeries, all are easily located in our Burnaby community. Overwaitea just brought in a line of hand cream made in B.C. and it was great to know they are supporting a smaller local business.

WHERE I BUY B.C. FOOD
Farmers' market, hypermarkets or clubs

In season produce at farmer's markets is always a first choice. Otherwise, Costco or the supermarket are our main places to shop for B.C. food.

HOW I CAN BE REACHED
Word of mouth, articles about product benefits and farmers

An article about a farmer and their products, or about the benefits of a product might catch my attention and make me want to try something new. However, I am not very adventurous in my food tastes, and make my choices at the store.

Focus on product freshness and nutritional value.
Provide information about product benefits, ingredients and origin.

* Fictitious character used to represent the segment

ON THE GO LABEL READERS

Raymond King*

"I usually eat vegetarian and my partner is gluten-intolerant so I'm always reading labels to make sure the food suits our needs."

WHO I AM

Gen X, higher income. Looks for ingredient listings and products that support special diets

I'm 46 years old and I live in the Fraser Valley with my partner. I have a busy life, and I'm often eating on the go. I try to make safe food choices, buying products without a lot of additives, but it is hard to find all the ingredients on the labels, or to know where the food comes from.

WHY I BUY LOCAL

B.C. products are fresher and offer better quality

Fresh food always tastes better and that is why I try to buy food from B.C. It is grown in a clean environment, and our regulations are better than in other areas of the world. I just need to ensure it addresses our dietary needs.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD

Clear, legitimate labels, product information and competitive prices

I'm already very interested in buying B.C. products. I just need an easier way to find them and ensure that they address our dietary needs. Clear product labeling with product origin and ingredient information would be very helpful.

* Fictitious character used to represent the segment

ON THE GO LABEL READERS

Raymond King*

8%	70%	53%	33%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY
Baked goods, alcoholic beverages, plant-based proteins
Eggs, fresh fruits and vegetables

I choose to buy local produce as much as possible. If it is local, it will taste fresh. Local baked goods – particularly if they are gluten free – are a must. I also often buy soy-based products and local beer and wine.

WHERE I BUY B.C. FOOD
Supermarkets, farmers' market, specialty stores and hypermarkets or clubs

I will shop at different places depending on what I need to buy. Fresh veggies and plant based proteins I do local, at the farmer's market or at specialty stores. Bulk items, canned goods, dairy, I usually get at Save-On Foods or Costco. If I am time constrained, I'll do all my shopping in a supermarket, but have to compromise on what I get for fresh items.

HOW I CAN BE REACHED
Word of mouth, articles about farmers and product benefits

I tend to trust what my friends tell me, and will try something at least once if it sounds intriguing. I may also notice an article about a producer, or an ad on social network. However, advertising affects me much less than seeing the quality of the B.C. goods first hand. Tasting a fresh tomato is heavenly.

Focus on convenience and dietary needs.
Provide information about farmers and product benefits via social network.

* Fictitious character used to represent the segment

SELECTIVE SNACKERS

Rita Gill*

"I rely on Instant Pot recipes that are super easy, convenient and cheaper than eating out, but sometimes I'm too busy to cook and will replace meals with snacks."

WHO I AM
Millennial, single, lower income
Looks for convenient and affordable food that suits a special diet

I'm 29 years old. I live in Surrey with my fiancé. We shop for gluten-free products, and buy low salt and non-GMO foods as much as possible. We eat home-made food often because it is cheaper, but if we're too busy to cook and we'll buy prepared food, or replace a meal with snacks.

WHY I BUY LOCAL
B.C. products are fresher. Will buy when they are available if they offer good value for money

When I think of local food I think of no preservatives. Fresher food that I know where it comes from, and is safe to eat. It is very affordable when it is in season, but I can't always get all the vegetables or meat that I want when it is not in season.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD
Competitive prices, clear, legitimate labels

I will only buy a product if the price is competitive. I always look for special prices and coupons for the products I need. Product labeling is also important to know where it comes from, and for information about its ingredients.

* Fictitious character used to represent the segment

SELECTIVE SNACKERS

Rita Gill*

9%	63%	50%	34%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY

Milk, bakery items, snacks, natural health products, plant-based protein

I buy lots of snacks ahead of time, trying to plan for the week. Things like granola bars, snack bars... We've found a few gluten free brands. We enjoy Vega One mixed with almond milk and coffee. I also get a delicious soup kit from the farmer's market. We do sometimes order food that features B.C. ingredients when we go out to eat.

WHERE I BUY B.C. FOOD

Supermarkets, specialty stores and hypermarkets or clubs

I typically shop at Save-On-Foods as the produce there is fresher. They advertise with sections of the flyer showing B.C. food, and they have a "local" section in the store. When I can, I go to the farmer's market. That's my favorite place to buy healthy snacks and meals for a fair price.

HOW I CAN BE REACHED

Word of mouth, articles about product benefits, reviews on social media

I think I'd be more likely to notice reviews on social media, compared to traditional advertising. Word of mouth also plays a role in our choices, especially when we dine out.

Focus on convenience and dietary needs.
Provide label information about contents, offer competitive prices through convenient channels.

* Fictitious character used to represent the segment

PRICE CONSCIOUS FOODIES

Joel Smith*

"I love experimenting with different kinds of food, but sometimes, I opt for a cheaper prepared meal that is quicker to get on the table."

WHO I AM

Millennial, children at home, higher than average income
Looks for exotic, flavorful foods

I'm 32 years old and live in the city of North Vancouver with my partner and our 7 year old daughter. We like to try new recipes with unique flavors, but with our schedules sometimes it is difficult to prepare a home-made meal. On those days, we grab something at the market, or order food delivery.

WHY I BUY LOCAL

B.C. products are fresher. Will buy if they are available and offer good value for the money

B.C. products are fresher, but if they costs twice as much as those from elsewhere it doesn't makes sense. I will pay a premium for something that is a significant spike up in quality and that is necessary for what I am cooking. I never buy food exclusively because it's made or produced in B.C.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD

Competitive prices

I find it quite frustrating that the food from B.C. is often much more expensive than food from other places. I would buy more of it if prices were more competitive. Special prices or coupons are nice, but I prefer to find specific brands that I can trust and will always be at a reasonable price.

* Fictitious character used to represent the segment

PRICE CONSCIOUS FOODIES

Joel Smith*

11%	74%	62%	32%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY
Eggs, milk, raw meat, poultry and seafood; bakery goods and alcoholic beverages

I'm aware that dairy and eggs come from B.C., but I don't give that much thought. I'll may buy B.C. meat or seafood when I'm preparing something special. I like 12 grain or ancient grain bread and I do buy that from B.C.. I also enjoy B.C. craft beers and wines, and will sometimes bring some home, or order them when we go out.

WHERE I BUY B.C. FOOD
Supermarkets, farmers' market and specialty stores

I like to buy produce from the supermarket or from a farmer's market. I am also close to a few specialty stores where I find most of what I need.

HOW I CAN BE REACHED
Word of mouth, social networks

Word of mouth definitely influences my choices. If my friends tell me a place or a product is good, I'll try it. I also get lots of ideas about places to eat or recipes to try through Pinterest, Facebook, and other sites that have targeted ads.

Focus on competitive prices and interesting flavors.
Processed and prepared products are appealing.

* Fictitious character used to represent the segment

SUBSISTENCE EATERS

Brian Clarke*

"I'm not much for paying for high priced food because I'm not much of a food lover – I just need something to make my stomach stop growling."

WHO I AM
Boomer, no children at home, average income
Eats cheap, to stay alive

I'm 60 years old and have lived in Prince George, B.C., for over 40 years. I'm self-employed, married, with no children living at home. I like to eat familiar things, that I've eaten all my life. My favorite meal is pizza, because it's easy to eat, no hassle, tastes great and it is not that expensive.

WHY I BUY LOCAL
B.C. products are fresher. Will buy if they are available and offer good value for the money

I don't care if my food comes from B.C. or not. Of course, fruits and vegetables in the summer are a given, because they are fresher and are good value for the money, but otherwise I can't honestly say that there are items that I will only purchase from local growers.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD
Competitive prices

I would prefer the prices of local food to be a little lower. That might convince me to buy more B.C. products. I may also use a coupon, if it is in the store, for a product that I am purchasing, or to try a new product if it's not too strange.

* Fictitious character used to represent the segment

SUBSISTENCE EATERS

Brian Clarke*

9%	65%	49%	23%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY
Eggs and milk
Dairy products and pantry items

Eggs and dairy products at Costco are generally from local producers, like Island Farms. Other than that I don't buy a lot of local products.

WHERE I BUY B.C. FOOD
Supermarkets and hypermarkets or clubs

I like to shop at Costco, because it is more affordable. I'll buy local produce there, if it is available and prices are competitive.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD
In-store promotions

I can't say that word of mouth has much of an influence in my choices of what I buy. I may notice an ad on TV or the internet, but I make my choices in the store.

Offer competitive prices and in-store promotions at supermarkets and hypermarkets.

* Fictitious character used to represent the segment

KITCHEN STRANGERS

Jason Gallagher*

"I don't have time to cook for myself as it takes too long. I usually eat snacks or take-out from restaurants near campus. I do the best I can to eat a balanced diet."

WHO I AM
Millennial, single, average income
Looks for convenience and affordability

I'm 25 years old and I'm currently at UVic finishing my degree. Paying for rent and school is pretty expensive, so I live cheaply. I don't have a lot of time to prepare my food, so I often eat take-out from restaurants near the campus. My favorite take-out is a pita, because it is easy and quick to eat while studying or working, and it's not junk food.

WHY I BUY LOCAL
Will buy B.C. products if they offer good value for the money

I don't typically choose to buy food just because it is from B.C. When I do pick food from B.C. it's because it is available where I shop and the price is right.

WHAT WOULD ENTICE ME TO BUY B.C. FOOD
Competitive prices

Sometimes I'll consider buying a different type of a product to try it out if it's cheaper than what I normally buy. If a product is clearly labeled as being from B.C., I might consider it, for the right price.

* Fictitious character used to represent the segment

KITCHEN STRANGERS

Jason Gallagher*

12%	54%	54%	39%
Of all food shoppers	*Buy unprocessed food often*	*Buy processed food often*	*Buy prepared food often*

WHAT I BUY LOCALLY
Limited – mostly milk and eggs

When I do buy milk and eggs they are often from B.C. Fruit I specifically buy from B.C., when it's around. Then it's usually the same price or cheaper than imported products.

WHERE I BUY B.C. FOOD
Supermarkets and convenience stores

My choices of places to buy food are based more on price and convenience than on where the food comes from. For B.C. food, I might sometimes go to the farmer's market, or the pop-up fruit stands in the summer, because they're usually well priced then.

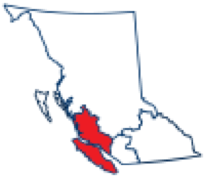
HOW I CAN BE REACHED
Reviews in social media and in-store initiatives

Social media is probably where I'd be most likely to notice an ad about B.C. food, but in the end, I think that if the product is clearly labeled in a separate section for B.C. foods, I would notice it when I went shopping.

Offer convenience and affordability.

* Fictitious character used to represent the segment

VANCOUVER ISLAND / COAST

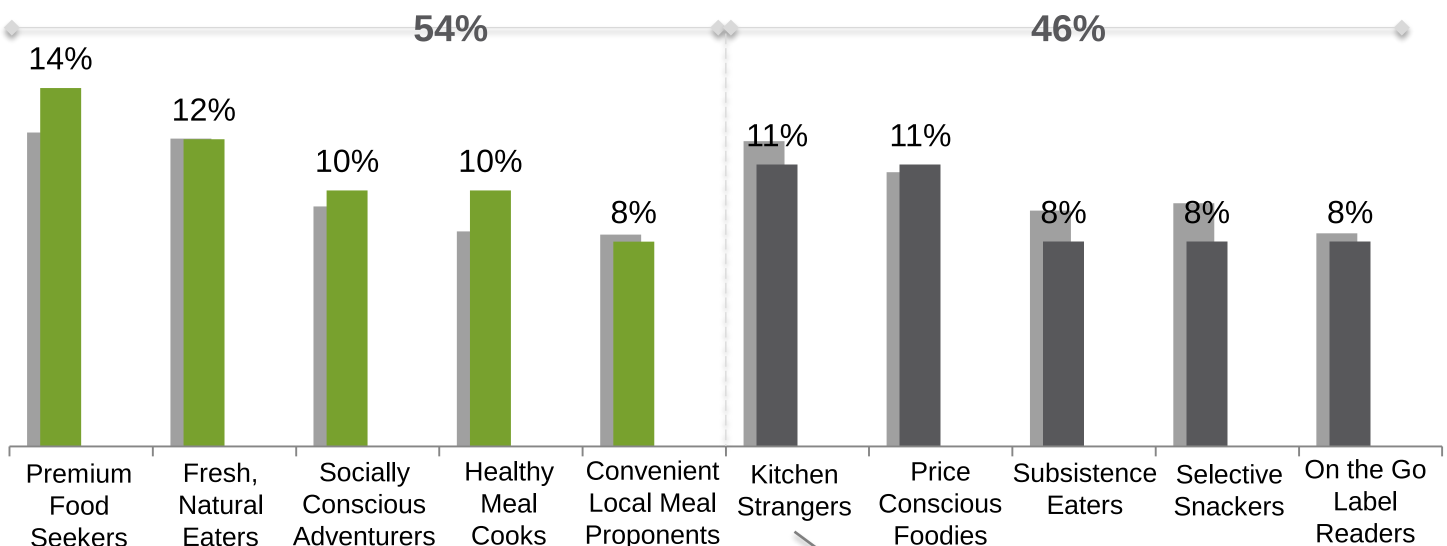


REGIONAL PROFILES

Segments Distribution

VANCOUVER ISLAND / COAST

- The Vancouver Island / Coast region has a strong market for B.C. products, including a higher than average proportion of Premium Food Seekers and Healthy Meal Cooks.
  - Its largest segments include Premium Food Seekers and Fresh, Natural Eaters from the high potential group, as well as Kitchen Strangers and Price Conscious Foodies, with lower potential.



Wendy Jones

Premium Food Seekers

Unconcerned about price, they are looking for fresh, flavourful, exotic food that suits their dietary preferences, while minimizing their negative social impact.

Patricia Sessio

Fresh, Natural Eaters

Looking to eat fresh, safe, nutritious food, they read product labels to identify product ingredients and source.

Jason Gallagher

Kitchen Strangers

Looking for convenience and affordability, they regularly buy prepared food, particularly from supermarkets and convenience stores.

Joel Smith

Price Conscious Foodies

Adventurous when it comes to eating, they love trying exotic foods with unique flavors, but affordability is an important consideration.

High Potential Segments | Low Potential Segments | Province Proportions

Motivation to Buy B.C. Products

High Potential Segments

VANCOUVER ISLAND / COAST

High Potential Segments

54%

Will respond positively to clear in-store signage and clear labeling indicating product origin. A “from B.C.” seal would be particularly successful with this group.

Given their particular needs, they will also respond positively to information about product freshness and production methods.

14%

Wendy Jones

Premium Food Seekers

Unconcerned about price, they are looking for fresh, flavourful, exotic food that suits their dietary preferences, while minimizing their negative social impact.

12%

Patricia Sessio

Fresh, Natural Eaters

Looking to eat fresh, safe, nutritious food, they read product labels to identify product ingredients and source.

10%

Bill Ignace

Socially Conscious Adventurers

With an adventurous taste, a specialized diet and a concern about the environmental impact of their food choices, they avidly look for information on product origin and ingredients.

10%

Joanna Williams

Healthy Meal Cooks

Concerned about the safety of their food, they look for fresh ingredients to prepare healthy meals from scratch. Try to support positive social impact, within a budget.

8%

Karen Valliere

Convenient Local Meal Proponent

Looking for easy to prepare and healthy meals, they seek to support the local economy with their purchases and to minimize their carbon footprint.

B.C. Products of Interest

VANCOUVER ISLAND / COAST

High Potential Segments

Product	Premium Food Seekers	Fresh, Natural Eaters	Socially Conscious Adventurers	Healthy Meal Cooks	Convenient Local Meal Proponent
Eggs	Above	Average	Above	Above	Average
Fresh fruits & vegetables	Above	Above	Above	Above	Above
Milk	Above	Average	Average	Above	Above
Raw meat & poultry	Above	Above	Above	Above	Above
Raw fish & seafood	Above	Above	Average	Above	Average
Grains, nuts, & seeds	Above	Below	Above	Above	Above
Baked goods	Average	Above	Average	Above	Above
Dairy other than milk	Above	Above	Average	Above	Above
Alcoholic beverages	Above	Average	Above	Above	Average
Pantry items	Above	Average	Average	Above	Above
Non-alcoholic beverages	Above	Average	Average	Above	Above
Snack foods	Above	Average	Below	Above	Above
Natural Health Products	Above	Above	Above	Above	Above
Plant-based proteins	Above	Below	Above	Below	Above

Above Average Purchases · Average Purchases · Below Average Purchases

Motivation to Buy B.C. Products

VANCOUVER ISLAND / COAST

Low Potential Segments

Low Potential Segments

46%

Will respond primarily to competitive prices, but might give B.C. products additional consideration if they cater to their needs and preferences, such as unique taste, convenience, or suitability for specific dietary needs, as the case may be.

11%

Jason Gallagher

Kitchen Strangers

Looking for convenience and affordability, they regularly buy prepared food, particularly from supermarkets and convenience stores.

11%

Joel Smith

Price Conscious Foodies

Adventurous when it comes to eating, they love trying exotic foods with unique flavors, but affordability is an important consideration.

8%

Brian Clarke

Subsistence Eaters

Not much of a food lover, they primarily consider price when making food purchase choices.

8%

Rita Gill

Selective Snackers

Seeking convenience and affordability, they often eat prepared food, from farmers' markets or convenience stores alike.

With special dietary needs and safety concerns, they are avid label readers.

8%

Raymond King

On the Go Label Readers

Unconcerned about price, they often favor the convenience of prepared food. With particular dietary needs, they look for information about product ingredients.

B.C. Products of Interest

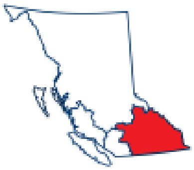
Low Potential Segments

VANCOUVER ISLAND / COAST

	Kitchen Strangers	Price Conscious Foodies	Subsistence Eaters	Selective Snackers	On the Go Label Readers
Eggs	Below	Average	Average	Below	Average
Fresh fruits & vegetables	Below	Below	Below	Below	Average
Milk	Below	Average	Average	Average	Below
Raw meat & poultry	Below	Average	Below	Below	Below
Raw fish & seafood	Below	Average	Below	Below	Below
Grains, nuts, & seeds	Below	Below	Below	Below	Average
Baked goods	Below	Average	Below	Average	Above
Dairy other than milk	Below	Below	Average	Below	Average
Alcoholic beverages	Below	Above	Below	Below	Above
Pantry items	Below	Below	Average	Below	Below
Non-alcoholic beverages	Below	Below	Below	Below	Average
Snack foods	Below	Below	Below	Above	Average
Natural Health Products	Below	Below	Below	Average	Below
Plant-based proteins	Below	Below	Below	Above	Above

Above Average Purchases | Average Purchases | Below Average Purchases

Thompson / Okanagan / Kootenay

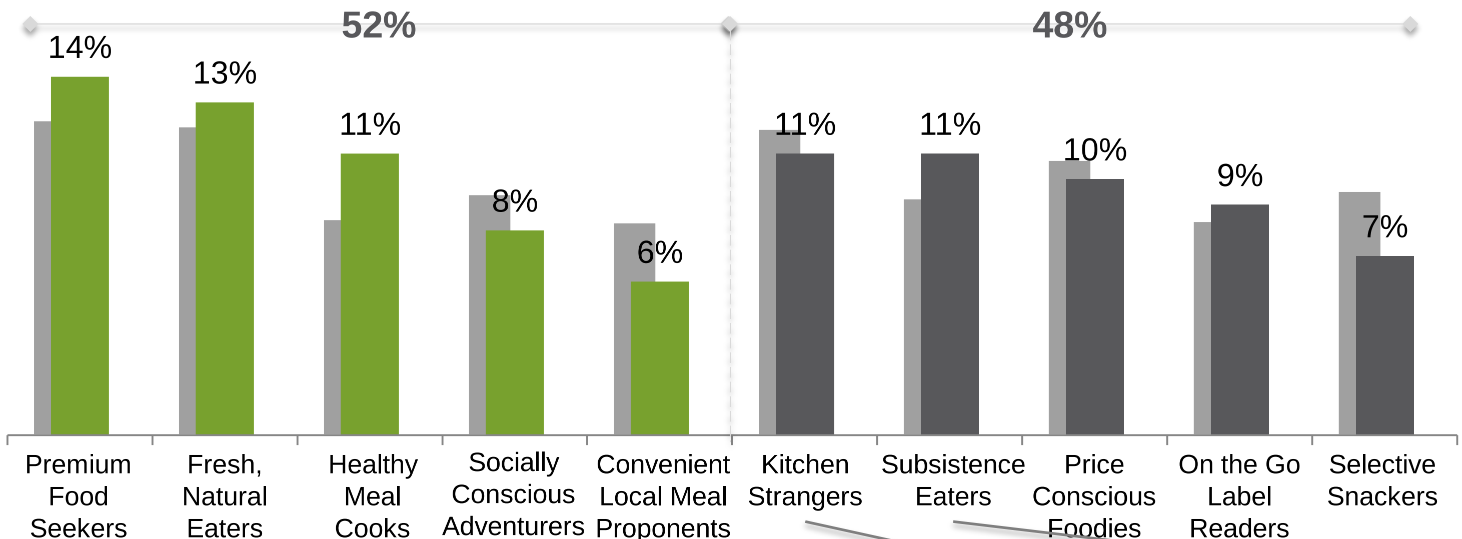


REGIONAL PROFILES

Segments Distribution

Thompson / Okanagan / Kootenay

- The Thompson / Okanagan / Kootenay region has a strong market for B.C. products, including a higher than average proportion of Premium Food Seekers and Healthy Meal Cooks.
  - Its largest segments include Premium Food Seekers, Fresh, Natural Eaters and Healthy Meal Cooks from the high potential group, as well as Kitchen Strangers and Subsistence Eaters, with lower potential.



Wendy Jones

Premium Food Seekers

Unconcerned about price, they are looking for fresh, flavourful, exotic food that suits their dietary preferences, while minimizing their negative social impact.

Patricia Sessio

Fresh, Natural Eaters

Looking to eat fresh, safe, nutritious food, they read product labels to identify product ingredients and source.

Joanna Williams

Healthy Meal Cooks

Concerned about the safety of their food, they look for fresh ingredients to prepare healthy meals from scratch. Try to support positive social impact, within a budget.

Jason Gallagher

Kitchen Strangers

Looking for convenience and affordability, they regularly buy prepared food, particularly from supermarkets and convenience stores.

Brian Clarke

Subsistence Eaters

Not much of a food lover, they primarily consider price when making food purchase choices.

High Potential Segments | Low Potential Segments | Province Proportions

Motivation to Buy B.C. Products

Thompson / Okanagan / Kootenay

High Potential Segments

High Potential Segments

52%

Will respond positively to clear in-store signage and clear labeling indicating product origin. A “from B.C.” seal would be particularly successful with this group.

Given their particular needs, they will also respond positively to information about product freshness and production methods.

14%

Wendy Jones

Premium Food Seekers

Unconcerned about price, they are looking for fresh, flavourful, exotic food that suits their dietary preferences, while minimizing their negative social impact.

13%

Patricia Sessio

Fresh, Natural Eaters

Looking to eat fresh, safe, nutritious food, they read product labels to identify product ingredients and source.

11%

Joanna Williams

Healthy Meal Cooks

Concerned about the safety of their food, they look for fresh ingredients to prepare healthy meals from scratch. Try to support positive social impact, within a budget.

8%

Bill Ignace

Socially Conscious Adventurers

With an adventurous taste, a specialized diet and a concern about the environmental impact of their food choices, they avidly look for information on product origin and ingredients.

6%

Karen Valliere

Convenient Local Meal Proponent

Looking for easy to prepare and healthy meals, they seek to support the local economy with their purchases and to minimize their carbon footprint.

B.C. Products of Interest

Thompson / Okanagan / Kootenay

High Potential Segments

Product	Premium Food Seekers	Fresh, Natural Eaters	Healthy Meal Cooks	Socially Conscious Adventurers	Convenient Local Meal Proponent
Eggs	Above Average	Average	Above Average	Above Average	Average
Fresh fruits & vegetables	Above Average	Above Average	Above Average	Above Average	Above Average
Milk	Above Average	Average	Above Average	Average	Above Average
Raw meat & poultry	Above Average	Above Average	Above Average	Above Average	Above Average
Raw fish & seafood	Above Average	Above Average	Above Average	Average	Average
Grains, nuts, & seeds	Above Average	Below Average	Above Average	Above Average	Above Average
Baked goods	Average	Above Average	Above Average	Average	Above Average
Dairy other than milk	Above Average	Above Average	Above Average	Average	Above Average
Alcoholic beverages	Above Average	Average	Above Average	Above Average	Average
Pantry items	Above Average	Average	Above Average	Average	Above Average
Non-alcoholic beverages	Above Average	Average	Above Average	Average	Above Average
Snack foods	Above Average	Average	Above Average	Below Average	Above Average
Natural Health Products	Above Average	Above Average	Above Average	Above Average	Above Average
Plant-based proteins	Above Average	Below Average	Below Average	Above Average	Above Average

Above Average Purchases — Average Purchases — Below Average Purchases

Motivation to Buy B.C. Products

Thompson / Okanagan / Kootenay

Low Potential Segments

Low Potential Segments

48%

Will respond primarily to competitive prices, but might give B.C. products additional consideration if they cater to their needs and preferences, such as unique taste, convenience, or suitability for specific dietary needs, as the case may be.

11%

Jason Gallagher

Kitchen Strangers

Looking for convenience and affordability, they regularly buy prepared food, particularly from supermarkets and convenience stores.

11%

Brian Clarke

Subsistence Eaters

Not much of a food lover, they primarily consider price when making food purchase choices.

10%

Joel Smith

Price Conscious Foodies

Adventurous when it comes to eating, they love trying exotic foods with unique flavors, but affordability is an important consideration.

9%

Raymond King

On the Go Label Readers

Unconcerned about price, they often favor the convenience of prepared food. With particular dietary needs, they look for information about product ingredients.

7%

Rita Gill

Selective Snackers

Seeking convenience and affordability, they often eat prepared food, from farmers' markets or convenience stores alike.

With special dietary needs and safety concerns, they are avid label readers.

B.C. Products of Interest

Thompson / Okanagan / Kootenay

Low Potential Segments

		Kitchen Strangers	Subsistence Eaters	Price Conscious Foodies	On the Go Label Readers	Selective Snackers
	Eggs	Below Average	Average	Average	Average	Below Average
	Fresh fruits & vegetables	Below Average	Below Average	Below Average	Average	Below Average
	Milk	Below Average	Average	Average	Below Average	Average
	Raw meat & poultry	Below Average	Below Average	Average	Below Average	Below Average
	Raw fish & seafood	Below Average	Below Average	Average	Below Average	Below Average
	Grains, nuts, & seeds	Below Average	Below Average	Below Average	Average	Below Average
	Baked goods	Below Average	Below Average	Average	Above Average	Average
	Dairy other than milk	Below Average	Average	Below Average	Average	Below Average
	Alcoholic beverages	Below Average	Below Average	Above Average	Above Average	Below Average
	Pantry items	Below Average	Average	Below Average	Below Average	Below Average
	Non-alcoholic beverages	Below Average	Below Average	Below Average	Average	Below Average
	Snack foods	Below Average	Below Average	Below Average	Average	Above Average
	Natural Health Products	Below Average	Below Average	Below Average	Below Average	Average
	Plant-based proteins	Below Average	Below Average	Below Average	Above Average	Above Average

Above Average Purchases | Average Purchases | Below Average Purchases

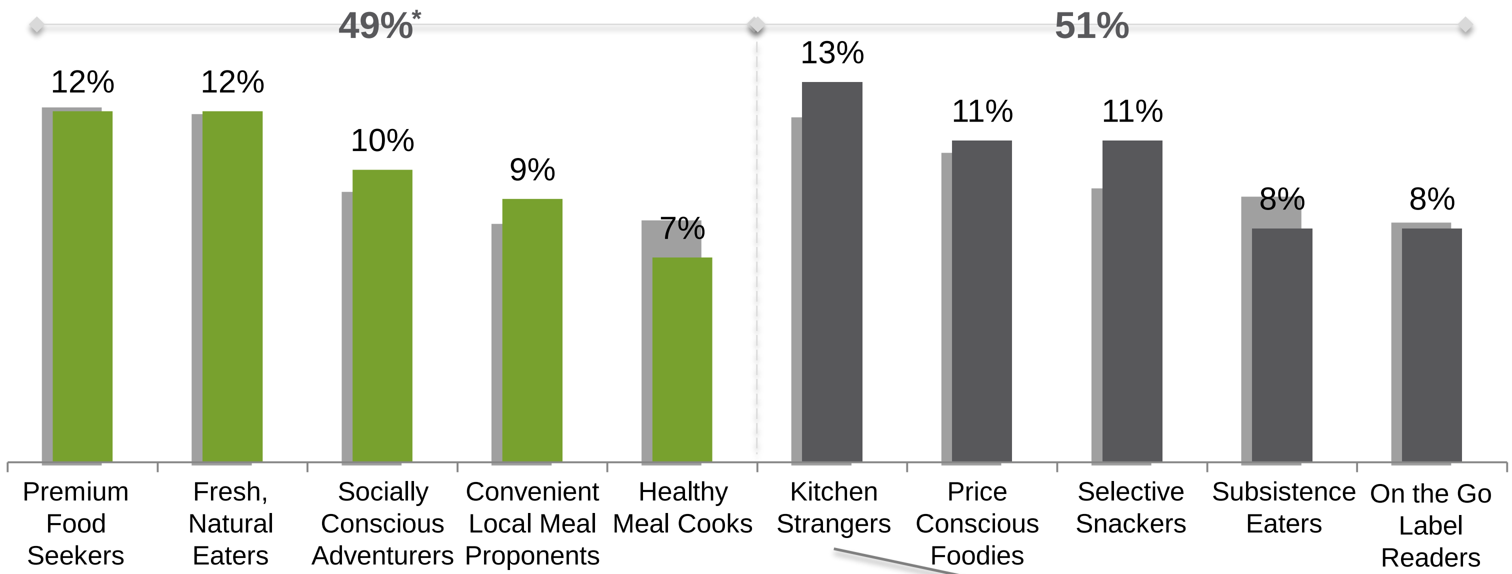
MAINLAND / SOUTHWEST

REGIONAL PROFILES

Segments Distribution

Mainland / Southwest

- The Mainland / Southwest region has a sizeable market for B.C. products, with 49% of its population in the high potential group. It also has a larger proportion of Selective Snackers.
  - Its largest segments include Premium Food Seekers and Fresh, Natural Eaters from the high potential group, as well as Kitchen Strangers with lower potential.



Wendy Jones

Premium Food Seekers

Unconcerned about price, they are looking for fresh, flavourful, exotic food that suits their dietary preferences, while minimizing their negative social impact.

Patricia Sessio

Fresh, Natural Eaters

Looking to eat fresh, safe, nutritious food, they read product labels to identify product ingredients and source.

Jason Gallagher

Kitchen Strangers

Looking for convenience and affordability, they regularly buy prepared food, particularly from supermarkets and convenience stores.

High Potential Segments Low Potential Segments Province Proportions

* Sum of bars doesn't add up to the total due to rounding

Motivation to Buy B.C. Products

High Potential Segments

Mainland / Southwest

High Potential Segments

49%*

Will respond positively to clear in-store signage and clear labeling indicating product origin. A “from B.C.” seal would be particularly successful with this group.

Given their particular needs, they will also respond positively to information about product freshness and production methods.

12%

Wendy Jones

Premium Food Seekers

Unconcerned about price, they are looking for fresh, flavourful, exotic food that suits their dietary preferences, while minimizing their negative social impact.

12%

Patricia Sessio

Fresh, Natural Eaters

Looking to eat fresh, safe, nutritious food, they read product labels to identify product ingredients and source.

10%

Bill Ignace

Socially Conscious Adventurers

With an adventurous taste, a specialized diet and a concern about the environmental impact of their food choices, they avidly look for information on product origin and ingredients.

9%

Karen Valliere

Convenient Local Meal Proponent

Looking for easy to prepare and healthy meals, they seek to support the local economy with their purchases and to minimize their carbon footprint.

7%

Joanna Williams

Healthy Meal Cooks

Concerned about the safety of their food, they look for fresh ingredients to prepare healthy meals from scratch. Try to support positive social impact, within a budget.

* Sum of bars doesn’t add up to the total due to rounding

B.C. Products of Interest

High Potential Segments

Product	Premium Food Seekers	Fresh, Natural Eaters	Socially Conscious Adventurers	Convenient Local Meal Proponent	Healthy Meal Cooks
Eggs	Above Average Purchases	Average Purchases	Above Average Purchases	Average Purchases	Above Average Purchases
Fresh fruits & vegetables	Above Average Purchases	Above Average Purchases	Above Average Purchases	Above Average Purchases	Above Average Purchases
Milk	Above Average Purchases	Average Purchases	Average Purchases	Above Average Purchases	Above Average Purchases
Raw meat & poultry	Above Average Purchases	Above Average Purchases	Above Average Purchases	Above Average Purchases	Above Average Purchases
Raw fish & seafood	Above Average Purchases	Above Average Purchases	Average Purchases	Average Purchases	Above Average Purchases
Grains, nuts, & seeds	Above Average Purchases	Below Average Purchases	Above Average Purchases	Above Average Purchases	Above Average Purchases
Baked goods	Average Purchases	Above Average Purchases	Average Purchases	Above Average Purchases	Above Average Purchases
Dairy other than milk	Above Average Purchases	Above Average Purchases	Average Purchases	Above Average Purchases	Above Average Purchases
Alcoholic beverages	Above Average Purchases	Average Purchases	Above Average Purchases	Average Purchases	Above Average Purchases
Pantry items	Above Average Purchases	Average Purchases	Average Purchases	Above Average Purchases	Above Average Purchases
Non-alcoholic beverages	Above Average Purchases	Average Purchases	Average Purchases	Above Average Purchases	Above Average Purchases
Snack foods	Above Average Purchases	Average Purchases	Below Average Purchases	Above Average Purchases	Above Average Purchases
Natural Health Products	Above Average Purchases	Above Average Purchases	Above Average Purchases	Above Average Purchases	Above Average Purchases
Plant-based proteins	Above Average Purchases	Below Average Purchases	Above Average Purchases	Above Average Purchases	Below Average Purchases

Above Average Purchases · Average Purchases · Below Average Purchases

Motivation to Buy B.C. Products

Low Potential Segments

Mainland / Southwest

Low Potential Segments

51%

Will respond primarily to competitive prices, but might give B.C. products additional consideration if they cater to their needs and preferences, such as unique taste, convenience, or suitability for specific dietary needs, as the case may be.

13%

Jason Gallagher

Kitchen Strangers

Looking for convenience and affordability, they regularly buy prepared food, particularly from supermarkets and convenience stores.

11%

Joel Smith

Price Conscious Foodies

Adventurous when it comes to eating, they love trying exotic foods with unique flavors, but affordability is an important consideration.

11%

Rita Gill

Selective Snackers

Seeking convenience and affordability, they often eat prepared food, from farmers' markets or convenience stores alike.

With special dietary needs and safety concerns, they are avid label readers.

8%

Brian Clarke

Subsistence Eaters

Not much of a food lover, they primarily consider price when making food purchase choices.

8%

Raymond King

On the Go Label Readers

Unconcerned about price, they often favor the convenience of prepared food. With particular dietary needs, they look for information about product ingredients.

B.C. Products of Interest

Low Potential Segments

		Kitchen Strangers	Price Conscious Foodies	Selective Snackers	Subsistence Eaters	On the Go Label Readers
	Eggs	Below Average	Average	Below Average	Average	Average
	Fresh fruits & vegetables	Below Average	Below Average	Below Average	Below Average	Average
	Milk	Below Average	Average	Average	Average	Below Average
	Raw meat & poultry	Below Average	Average	Below Average	Below Average	Below Average
	Raw fish & seafood	Below Average	Average	Below Average	Below Average	Below Average
	Grains, nuts, & seeds	Below Average	Below Average	Below Average	Below Average	Average
	Baked goods	Below Average	Average	Average	Below Average	Above Average
	Dairy other than milk	Below Average	Below Average	Below Average	Average	Average
	Alcoholic beverages	Below Average	Above Average	Below Average	Below Average	Above Average
	Pantry items	Below Average	Below Average	Below Average	Average	Below Average
	Non-alcoholic beverages	Below Average	Below Average	Below Average	Below Average	Average
	Snack foods	Below Average	Below Average	Above Average	Below Average	Average
	Natural Health Products	Below Average	Below Average	Average	Below Average	Below Average
	Plant-based proteins	Below Average	Below Average	Above Average	Below Average	Above Average

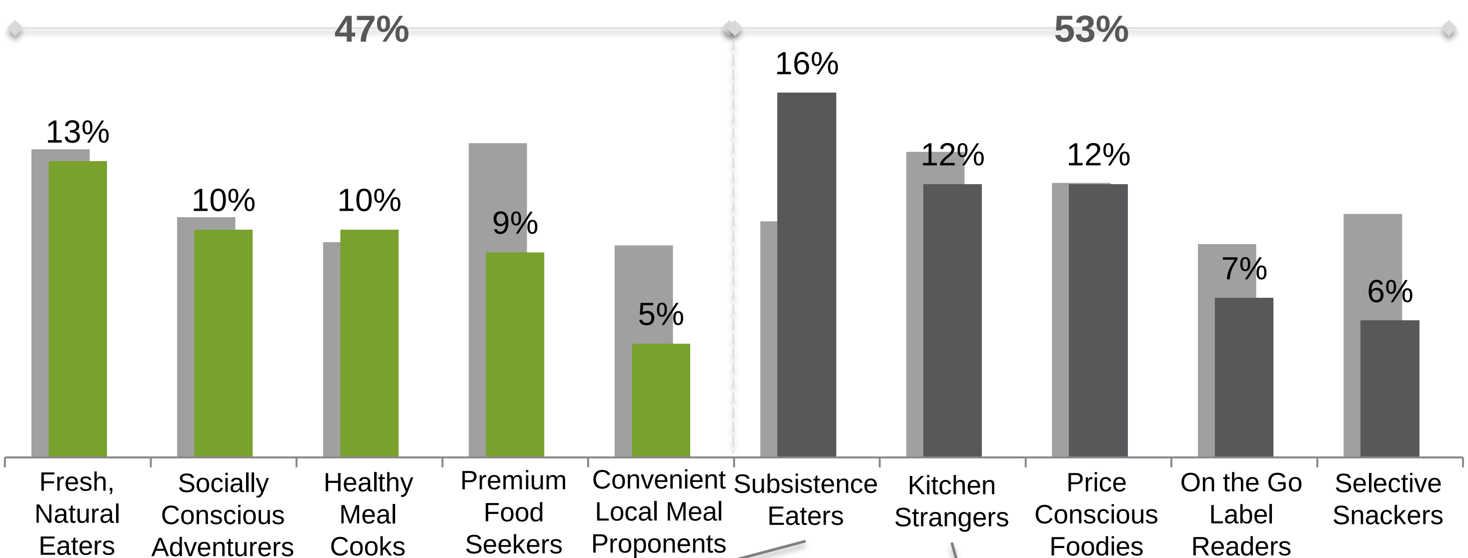
Above Average Purchases Average Purchases Below Average Purchases

Cariboo / North

REGIONAL PROFILES

Cariboo / North

- The Cariboo / North region has a higher concentration of price-sensitive segments, particularly Subsistence Eaters, who are not naturally inclined to look for B.C. food products.
  - Its largest segments include Fresh, Natural Eaters from the high potential group, as well as Subsistence Eaters, Kitchen Strangers, and Price Conscious Foodies with lower potential.



Patricia Sessio

Fresh, Natural Eaters

Looking to eat fresh, safe, nutritious food, they read product labels to identify product ingredients and source.

Brian Clarke

Subsistence Eaters

Not much of a food lover, they primarily consider price when making food purchase choices.

Jason Gallagher

Kitchen Strangers

Looking for convenience and affordability, they regularly buy prepared food, particularly from supermarkets and convenience stores.

Joel Smith

Price Conscious Foodies

Adventurous when it comes to eating, they love trying exotic foods with unique flavors, but affordability is an important consideration.

High Potential Segments   Low Potential Segments   Province Proportions

Cariboo / North

Motivation to Buy B.C. Products

High Potential Segments

High Potential Segments

47%

Will respond positively to clear in-store signage and clear labeling indicating product origin. A “from B.C.” seal would be particularly successful with this group.

Given their particular needs, they will also respond positively to information about product freshness and production methods.

13%

Patricia Sessio

Fresh, Natural Eaters

Looking to eat fresh, safe, nutritious food, they read product labels to identify product ingredients and source.

10%

Bill Ignace

Socially Conscious Adventurers

With an adventurous taste, a specialized diet and a concern about the environmental impact of their food choices, they avidly look for information on product origin and ingredients.

10%

Joanna Williams

Healthy Meal Cooks

Concerned about the safety of their food, they look for fresh ingredients to prepare healthy meals from scratch. Try to support positive social impact, within a budget.

9%

Wendy Jones

Premium Food Seekers

Unconcerned about price, they are looking for fresh, flavourful, exotic food that suits their dietary preferences, while minimizing their negative social impact.

5%

Karen Valliere

Convenient Local Meal Proponent

Looking for easy to prepare and healthy meals, they seek to support the local economy with their purchases and to minimize their carbon footprint.

B.C. Products of Interest

Cariboo / North

High Potential Segments

Product	Fresh Natural Eaters	Socially Conscious Adventurers	Healthy Meal Cooks	Premium Food Seekers	Convenient Local Meal Proponent
Eggs	Average	Above Average	Above Average	Above Average	Average
Fresh fruits & vegetables	Above Average	Above Average	Above Average	Above Average	Above Average
Milk	Average	Average	Above Average	Above Average	Above Average
Raw meat & poultry	Above Average	Above Average	Above Average	Above Average	Above Average
Raw fish & seafood	Above Average	Average	Above Average	Above Average	Average
Grains, nuts, & seeds	Below Average	Above Average	Above Average	Above Average	Above Average
Baked goods	Above Average	Average	Above Average	Average	Above Average
Dairy other than milk	Above Average	Average	Above Average	Above Average	Above Average
Alcoholic beverages	Average	Above Average	Above Average	Above Average	Average
Pantry items	Average	Average	Above Average	Above Average	Above Average
Non-alcoholic beverages	Average	Average	Above Average	Above Average	Above Average
Snack foods	Average	Below Average	Above Average	Above Average	Above Average
Natural Health Products	Above Average	Above Average	Above Average	Above Average	Above Average
Plant-based proteins	Below Average	Above Average	Below Average	Above Average	Above Average

Above Average Purchases Average Purchases Below Average Purchases

Motivation to Buy B.C. Products

Low Potential Segments

Low Potential Segments

53%

Will respond primarily to competitive prices, but might give B.C. products additional consideration if they cater to their needs and preferences, such as unique taste, convenience, or suitability for specific dietary needs, as the case may be.

16%

Brian Clarke

Subsistence Eaters

Not much of a food lover, they primarily consider price when making food purchase choices.

12%

Jason Gallagher

Kitchen Strangers

Looking for convenience and affordability, they regularly buy prepared food, particularly from supermarkets and convenience stores.

12%

Joel Smith

Price Conscious Foodies

Adventurous when it comes to eating, they love trying exotic foods with unique flavors, but affordability is an important consideration.

7%

Raymond King

On the Go Label Readers

Unconcerned about price, they often favor the convenience of prepared food. With particular dietary needs, they look for information about product ingredients.

6%

Rita Gill

Selective Snackers

Seeking convenience and affordability, they often eat prepared food, from farmers' markets or convenience stores alike.

With special dietary needs and safety concerns, they are avid label readers.

B.C. Products of Interest

Low Potential Segments

	Subsistence Eaters	Kitchen Strangers	Price Conscious Foodies	On the Go Label Readers	Selective Snackers
Eggs	Average	Below	Average	Average	Below
Fresh fruits & vegetables	Below	Below	Below	Average	Below
Milk	Average	Below	Average	Below	Average
Raw meat & poultry	Below	Below	Average	Below	Below
Raw fish & seafood	Below	Below	Average	Below	Below
Grains, nuts, & seeds	Below	Below	Below	Average	Below
Baked goods	Below	Below	Average	Above	Average
Dairy other than milk	Average	Below	Below	Average	Below
Alcoholic beverages	Below	Below	Above	Above	Below
Pantry items	Average	Below	Below	Below	Below
Non-alcoholic beverages	Below	Below	Below	Average	Below
Snack foods	Below	Below	Below	Average	Above
Natural Health Products	Below	Below	Below	Below	Average
Plant-based proteins	Below	Below	Below	Above	Above

Above Average Purchases | Average Purchases | Below Average Purchases

APPENDIX

METHODOLOGY

Methodology

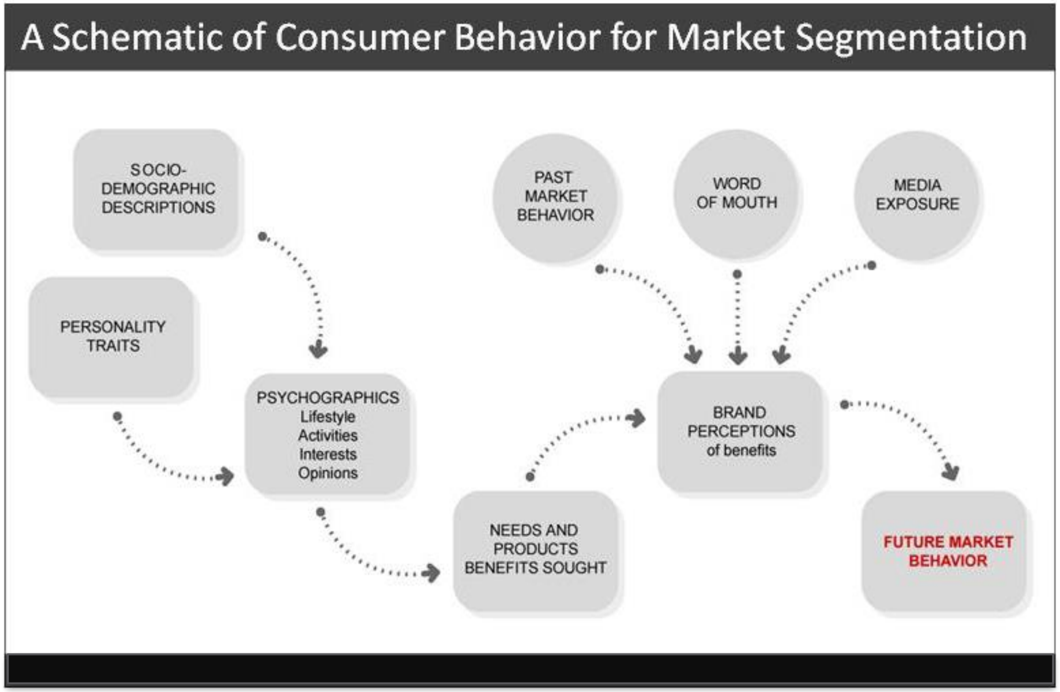
Context Setting

- In order to attain an understanding of the trends and drivers impacting the context within which the B.C. local agrifood and seafood businesses will be operating in the near future, when trying to address the needs of local market target segments, a brief context setting exercise, consisting of secondary research and four in-depth interviews with industry experts – a Producer, a Chef, a Distributor, and a Customer Expert – was conducted.
- The relevance of this phase is grounded on the premise that at various points in time, new social, technological, economic, environmental, political, or values-based trends emerge that may impact the context within which businesses operate. New options may become available and others may cease to exist. People's attitudes, needs, preferences and expectations change, and those might have a significant impact on business strategy.
- Taking these trends and their drivers into consideration when developing a go-to-market approach to appeal to the target segments would increase the likelihood that the value propositions that are developed will be resilient to such changes.
- The intent for this phase was a simplified version of an encompassing horizon scan study, to provide a forward-looking framework to the remainder of the research. This framework enabled the assessment of the potential impact of emerging trends and drivers on people's behaviors.
- To review the summary of this phase of the research, please go to page 74 of this document.

Methodology

Segmenting the B.C. Food Market

- The figure shown herein depicts the framework that guided the approach to this market segmentation.
  - Each individual decision-maker can be represented by their social and demographic characteristics as well as personality traits, all of which combine to define what are known as psychographic dimensions of an individual (lifestyle, activities engaged in, interests, opinions, etc.). These are assumed to drive the needs and benefits sought by the individual with respect to the product of interest (in this case, food products).
  - Past experience with brands and/or providers, word-of-mouth and media exposure all contribute to form the consumer's perceptions of how each brand/provider in the marketplace will meet their needs and benefits sought. These perceptions then become one of the principal determinants of future market behavior, along with product attributes, pricing, and channels of distribution.



- All these varied pieces of information are used to form market segments, which are clusters of individuals with similar attitudes, preferences, needs and behaviors.
- The information generated by this approach can then be used to support product development, portfolio optimization, pricing, marketing and customer targeting.

Image adapted from Wilkie and Cohen, 1976

Methodology

Data Collection (Segmentation)

- The data required for the development of the market segmentation was collected via a 24 minute quantitative survey of 2984 adult B.C. residents.
  - The data was collected using multiple modes, with a combination of an interview led telephone survey and a telephone recruit to a self-completion web survey.
  - Both landline and mobile phone numbers were called, to ensure that mobile phone only households were given the opportunity to participate in the study.
  - Participants were not incented to complete the survey.
  - The final sample has a large representation of four B.C. regions, and is representative of the demographic profile of the province.
  - Reporting of province-wide results uses weighted data to correct primarily for region oversampling.

	Number of respondents	2984
	Mainland / Southwest	707
	Vancouver Island / Coast	808
	Thompson / Okanagan / Kootenay	729
	Cariboo / North	704

Methodology

Segment Profiling

Following the identification of segments, the final phase of the research was conducted in order to support the development of *personas** to represent each segment.

Methodology

- Residents who completed the quantitative survey were asked if they would be interested in participating in future research. From that group, a representative (by gender, age, segment and region) group of 50 participants were recruited via telephone to participate in a follow up discussion.

Completed survey (2984) → Interested in Future Research (1227) → Recruited (50) → Completed discussion board (37)

- The follow up discussion, in the form of an online bulletin board, took place between December 6th and December 8th, 2017. Participants logged into the online discussion, and were presented with the days questions (approximately 10 per day), which they answered in writing. They could also see and respond to comments from the moderators and from other participants.
- Topics included:

Day 1
"About you and your food preferences"

Day 2
"What impacts where & how you shop for food"

Day 3
"B.C. Food"

* Fictitious characters based on research results.

APPENDIX
ICON LEGEND

Descriptives

Millennials (19 to 34)

Gen X (35 to 54)

Baby Boomers (55+)

Males

Females

Average household income in 2016

Household with single adult, no children

Household with multi-adults, no children

Household with children

Live in large urban city

Live in small urban city

Live in small town

Live in rural area

Shopping Role

Sole grocery shopper in the household

Shared grocery shopper in the household

Often Purchased Products

Unprocessed food products

Processed food products

Prepared meals

Media Preference to Try a B.C. Food Product Based on

Friends sharing their experience with you

Hearing or viewing advertisement about a B.C. product

Reading an article about the benefits of the product and how to use it

Reading an article about the farmers or producers and their stories

Reviews, recommendations and stories you find on social media

Media Likely to Notice Ads or Information about B.C. Food Products, Farmers and Producers

Cable or satellite TV

Radio

Social networks

Video streaming

Video sharing

Unprocessed Food Grown or Raised in B.C.

Eggs

Fresh fruits and vegetables

Grains, nuts and seeds

Milk

Raw meat and poultry

Raw fish and raw seafood

Products Processed or Manufactured in B.C.

Alcoholic beverages

Baked goods

Dairy products other than milk

Natural Health Products

Non-alcoholic beverages

Pantry items

Plant-based proteins such as vegan burgers or dairy substitutes

Snack foods

Reasons to Purchase Food Products Grown, Raised, Processed or Manufactured in B.C.

Availability

Better for environment

Better quality

Fresher

Good value for money

Know their origin

Safer

Places to Purchase Food Products Grown, Raised, Processed or Manufactured in B.C.

Convenience store

Farmer's market

Harvest box service

Hypermarket or club

Specialty shop

Initiatives at the Shopping Places That Might Increase Your Likelihood of Buying Products Grown, Raised or Produced in B.C.

Clear labeling that it is from B.C

Competitive prices

Product information

Seal would buy more

Places to Purchase Prepared Meals and Dishes

Convenience stores

Eating establishments

Farmers' markets

Food delivery services

Subscription services that offer meals

Supermarkets and grocery stores

Restaurant / Menu / Alcoholic Beverage Choice

Choose one known to source its ingredients from B.C. over another restaurant

Order foods featuring B.C. ingredients over other menu items

Order an alcoholic beverage from B.C. over that is not from B.C.

Initiatives That Might Increase Your Likelihood of Choosing B.C. Sourced food or Alcoholic Beverages When Eating at A Restaurant

Competitive prices

Promotions and discounts to try B.C. products

Clear indication that ingredients/beverages from B.C.

APPENDIX

CONTEXT SETTING REPORT

THE CHOICE CONTEXT SETTING

DRIVERS & TRENDS IMPACTING THE LOCAL FOOD INDUSTRY

Research Question	Drivers & Trends
WHY DO THEY BUY?	Traditional and emerging drivers of product choice
WHERE DO THEY BUY?	Innovations and disruptions in the distribution channels
WHO ARE THEY?	Socio-demographic trends impacting choices
HOW DO WE REACH THEM?	The possibilities of digital channels

TRADITIONAL DRIVERS OF CHOICE HAVE EVOLVED

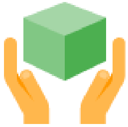
A health-conscious, knowledgeable, diverse cohort of consumers has redefined the meaning of quality, taste, convenience and value.

Food Beyond Fuel – Redefining "healthy" food

A growing trend towards healthier lifestyles is driving the demand for healthier eating habits, even away from home[1]. The definition of what is "healthy" is expanding beyond low-fat and low-calorie to include attributes such as natural/organic, GMO-free, and the absence of artificial ingredients or additives[2]. "Naturally functional" (with inherent health benefits) are in high demand and often command a premium[3].

Product Diversity – An inclusive definition of "taste"

Newcomers from across the globe are bringing with them exotic recipes and ingredients, taking the concept of ethnic food to a new level[4]. Consumers now know about and demand a greater variety of ingredients (e.g., ancient-grain flours), ethnic profiles (e.g., Korean barbecue), craft/artisan positioning, and price point (e.g., premium, budget)[5]. A significant and growing number of them have specific dietary restrictions (e.g., Kosher, Halal, vegan, gluten-free, dairy-free), and are diverting their expenditure to products that meet their needs[5].



Service Personalization – Beyond "convenience"

Convenience, which traditionally might have been associated primarily with fast-food chains, has been taken to a new level. The proliferation of purchasing options (in store or online/mobile from producer or distributor, online/mobile from a delivery service), innovative foodservice channels (kiosks, food trucks, grocerants, subscription boxes, CSA)[7], and the varying levels of food quality, diversity and preparation that can be purchased enable customers to personalize convenience to their individual needs.

Premiumization – Enhancing the "value" of products and services

As consumers have become more knowledgeable about food, many are willing to pay a premium for what they perceive to be value-added attributes. According to a Nielsen survey, roughly four in 10 global respondents they're very willing to pay a premium for products made with organic or all-natural ingredients (42%) or environmentally friendly or sustainable materials (39%), and 31% say they're very willing to pay a premium for socially responsible products[6].

The perception of *local food* is often aligned with many definitions of "healthy" and "socially responsive", presenting opportunities for premiumization. Product diversity is a potential limitation, as some farmers and producers have a limited view of "what is food"[8]. The convenience aspect offers many possibilities, to be aligned with the preferences of target segments, once those are defined.

[1] https://www.technomic.com/technomic-releases-5-key-consumer-trends-2017
[2] http://www.foodlogistics.com/article/12090973/food-industry-logistics-trends-that-matter
[3] http://www.nutraceuticalsworld.com/issues/2016-11/view_features/key-trends-in-functional-foods-beverages-for-2017/
[4] https://www.technomic.com/technomic-releases-2017-canadian-trends-forecast
[5] http://www.foodlogistics.com/article/12090973/food-industry-logistics-trends-that-matter
[6] http://www.nielsen.com/content/dam/nielsenglobal/de/docs/Nielsen%20Global%20Premiumization%20Report%20December%202016.pdf
[7] http://bc.albion.ca/blog/2017/03/08/specialization-and-deconsolidation-are-driving-change-in-the-food-industry/

NEW DRIVERS OF CHOICE HAVE EMERGED

Socially-conscious, information-rich and experience-driven consumers have added a new layer of attributes to their food purchase choices

Safety – Avoiding short-term and long-term risks

While food safety has traditionally been associated with near-term risks (e.g., *Listeria and E. coli*)[3], and those are still valid concerns, some consumers now associate safety with attributes that may have a more long term impact, typically associated with health & wellness (e.g., food that contains only healthy, nutritious ingredients), and transparency (e.g., information about ingredients and source is available to assess health risks and supply chain practices)[1], all of which requires clear and accurate labeling. An emerging concern relates to potential terrorist attacks.

Sustainability – Socially, economically and environmentally sound practices

A growing concern regarding the social, economic and environmental impact of companies' practices has led to an increase in socially conscious consumers, who use their purchasing power to try to enforce their views. Some important aspects in their choices include ensuring a sufficient food supply[2], commitment to food safety, fair treatment of workers, local sourcing of products, environmental responsibility, and role in the community[1]. A number of local organizations have been working on addressing some of these concerns[4], raising awareness, which may further impact food choices.

Experience – Creating memories and emotional connections

The commodification of products and services has led to the rise of the experience economy, where customers choose memories over goods and purchases are based on conforming to self-image. In the local food context, the interest of some individuals is driven by their engagement in food culture, what's happening in food and the love for exciting or just unique distinctive food experience. Some find appeal in knowing the story behind the grower, the producer, or the manufacturer, looking for authentic stories that resonates with them at an emotional level[3]. Local initiatives cover a wide range of alternatives, from the development of communities around local food to multi-sensorial fine dining experiences[5].

Transparency – Delivering the information customers need

Concerns regarding safety and practices along the food supply chain have led to an increasing demand for transparency. Customers are looking for information on all ingredients in their food, where they come from, date when they were harvested/produced, production practices, the producers and their values[3]. A study indicates that ¾ of consumers would pay more for products that offered complete transparency[7]. Innovators are in collaboration to address this demand, bringing food and digital technologies together to change the way food is produced, distributed, consumed and depicted[6].

The local food market already delivers on most of these drivers, leveraging the story behind the farmers and producers for transparency, collaborations with chefs and other producers to enhance the local food culture, and the support of local businesses for sustainability. Safety may still be a concern, as some of the current practices don't meet distributors' minimum standards[3].

1 https://www2.deloitte.com/content/dam/Deloitte/us/Documents/consumer-business/us-fmi-gma-report.pdf
2 http://www.agr.gc.ca/eng/industry-markets-and-trade/statistics-and-market-information/agriculture-and-food-market-information-by-region/socially-conscious-consumer-trends-sustainability/?id=1410083148827
3 Advanis Expert Interviews
4 https://shop.second-life.ca/collections/local , http://www.endfoodwaste.org/canada.html , https://sustain.ubc.ca/campus-initiatives/food/sustainable-food-initiatives , https://www.healthlinkbc.ca/healthy-eating/professionals/food-security
5 http://eatlocal.org/events/community-tables/ , http://www.butchartgardens.com/activities/experiences
6 http://blogs.cisco.com/digital/the-internet-of-food-improving-lives
7 http://www.preparedfoods.com/articles/118730-how-does-food-product-transparency-affect-consumer-behavior

CHANGES IN DISTRIBUTION EXPAND OPTIONS

Traditional and new players disrupt the distribution system, offering new options to address unmet customers needs

Disintermediation – Disrupting the Supply Chain

An increasing number of farmers markets (http://www.bcfarmersmarket.org/), CSA (http://www.farmfolkcityfolk.ca/), food hubs (https://food-hub.org/), and direct sales at the farm (http://www.pickyourown.org/CNBC.htm) or for delivery (http://www.spud.ca/) is eliminating intermediary steps of the distribution chain, addressing people's demand for fresher products, while enabling producers to keep higher margins and better plan their cash flow. This trend is also observed at the B2B level, as chefs and farmers collaborate directly to support each other and address patrons' demands.

Convergence of Traditional Channels – Grocerants

Grocerants are an extension of the supermarket deli services, which, in addition to the traditional salads, fresh bakery items and rotisserie chickens, may also include sit-down service with waiters, full bars and even sushi chefs, creating new competition for fast-food chains and traditional restaurants[1]. An upscale extension of the concept offers an immersive cultural, gastronomic, educational experience (https://www.eataly.com/).

Non-Traditional and Emerging Channels

A growing number of nontraditional retail and food distribution channels is changing the market structure, giving consumers more alternatives. Limited-assortment stores (https://www.aldi.us/), fresh-format stores (http://sproutmarket.ca/), next generation vending, kiosk, pop-up stores and food trucks with unique offers compete with traditional channels[2]. Convenience stores are offering prepared food on the go[3]. Subscription boxes with produce, snacks, meal kits or fresh meals (https://www.mamaearth.ca/, https://www.freshcityfarms.com/, http://urbantastebud.com/best-snack-subscription-boxes/, www.plated.com, www.blueapron.com, https://munchery.com/) offer a new level of convenience, customizable to individual preferences.

Digital Channels

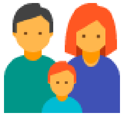
People are increasingly buying food on-demand and online instead of going to the supermarket, and according to a study by Nielsen, more than 50% of global consumers are inclined to shop groceries online[4]. Services such as https://www.ubereats.com/, https://www.foodora.ca/ and https://www.just-eat.ca/ enhance the options for prepared meal buyers, while https://www.grocerygateway.com offers produce options. Amazon now offers AmazonFresh, a grocery delivery and pickup service available exclusively to Prime members in select cities[5], an indication that options may expand further.

The success of some of the local farmers is in part associated with a powerful distribution strategy, which often by-passes distributors[6]. However, with so many options available, planning such strategy may be challenging. The direct channels offer the opportunity to leverage the transparency aspect, but addressing needs for convenience, individual preferences, safety and reach may require collaboration.

[1] https://www.usatoday.com/story/money/business/2017/04/05/grocerants-take-bite-out-restaurants/99723098/
[2] http://bc.albion.ca/blog/2017/03/08/specialization-and-deconsolidation-are-driving-change-in-the-food-industry/
[3] http://www.foodlogistics.com/article/12090973/food-industry-logistics-trends-that-matter
[4] https://blog.thinque.com.au/future-of-food-shopping-digital-disintermediation
[5] https://www.amazon.com/gp/help/customer/display.html?nodeId=201338210
[6] Advanis Expert Interviews

PERSONAL CIRCUMSTANCES INFLUENCE CHOICE

Demographics and socio-economic characteristics impact people's preferences and access to alternatives



Generational Differences – New vs. Traditional Ways

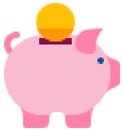
While Boomers led the demand for fresh, less processed foods and beverages, they now have a more traditional approach to food shopping and preparation, using dedicated recipe sites (e.g., allrecipes.com), making well-planned shopping trips, using circulars and not technology while in store. They look for recognizable ingredients, few additives, minimally processed food, and, when dining out, choose more traditional food[1]. Meanwhile Gen Z, a cohort of ethnically diverse digital natives, tends to look for more ethnic mashup foods, desserts and drinks worthy of Instagram, emoji speak on the menu, chatbots, Snapchat filters, packaging hacks (think a meal box that can charge a smartphone) and a greater emphasis on corporate responsibility and environmental stewardship. Delivery, mobile payment and kiosk ordering trends may increase[2].

Location – The Options to Choose From

Expanding urbanization is changing geographic demand patterns. A heavy increase in urban and local retailers, restaurants[3] and delivery services gives urban residents many more food shopping alternatives than what would be available to rural dwellers. Urban density is also driving the need for smaller living spaces, with limited storage and cooking spaces, which may lead to more frequent shopping trips for smaller quantities, and more prepared meals, which may not be the pattern in more rural areas. Within both urban and rural areas, food deserts still exist, where, due to limited income and/or access to transportation, residents may have no access to fresh, healthy and affordable food[4].

Lifestyle – Fast-Paced vs. Slow Meals

In the current dominant lifestyle, demands of work, raising a family, commuting, social interaction, kid's after-school activities, all contribute to a food marketplace where convenience is at a premium, and traditional views of meals and mealtime can pretty much be discarded[5]. Conversely, the Slow Food Movement, a social and political movement resisting the dehumanizing effects of large-scale, commercial food production and the fast-food industry, aims to preserve cultural cuisine and in so doing to preserve the food plants and seeds, domestic animals and farming within an eco-region[6].



Economic Status – Premium vs. Budget Offers

Instability has reached new levels due to increasing uncertainty. The middle class is being squeezed, and the needs of the top and bottom economic tiers are increasingly polarized. Though lower- and middle-class consumers might curb foodservice spending until instability subsides, few cutbacks are expected among affluent consumers. That is shaking up conventional "everything for everybody" business models and supporting supply chains in foodservice[3,7].

Clarity on the decision process of each segment is important for a successful strategy. Demographic and socio-economic characteristics will help shed light on the needs, options and constraints forming their decision context, offering direction on who to target and how.

[1] http://www.hartman-group.com/hartbeat/667/wired-youth-and-wise-elders-consumers-young-and-old-are-reshaping-food-culture-and-the-food-industry
[2] https://www.technomic.com/technomic-releases-2017-canadian-trends-forecast
[3] http://www.foodlogistics.com/article/12090973/food-industry-logistics-trends-that-matter
[4] http://servingfoodsolutions.com/the-problem/location/food-deserts/
[5] https://www.thebalance.com/restaurants-retail-grocery-merging-1326050
[6] http://www.slowmovement.com/slow_food.php
[7] https://www.technomic.com/technomic-releases-5-key-consumer-trends-2017

DIGITAL CHANNELS TRANSFORM ENGAGEMENT

The internet and social media transform the ways in which customers learn about, experience, and interact with food and brands

Socializing Knowledge

Thanks to a variety of digital offers, customers are becoming a lot more knowledgeable about food, and more willing to experiment. Online communities offer recipes[1], fun facts about food, and tips on food hack[2]. YouTube videos teach various skills to enhance food appreciation[3], inspire people to cook[4] and lead a healthy life[5]. MOOC offers about any food related topic are available in abundance[6].

Increasing Transparency

Collaboration efforts between technology and food entrepreneurs have been established to develop ways to enhance the transparency of the food supply chain[7]. Stores are offering traceability information on their sites[8]. Local restaurants, food service establishments and local bloggers offer detailed information online about menus[9], which customers often check ahead of time. Distributors are investing in interactive technology to display their local producers and their stories[10].

Conveying and Enhancing Experiences

Social media has transformed the way in which experiences are shared and emotions are conveyed. We have transitioned to a very highly visual culture, where Pinterest or YouTube or Instagram, offer very rich, colour-saturated experiences with food, which may convey various types of emotions[11]. Twitter quickly conveys your views to the brands you interact with. Data mining is being increasingly used by those involved in the food industry to improve customer experience, increase efficiency and even come up with new innovative recipes[12].

While a large part of the marketing of local food producers may be through traditional channel, which are traditionally consistent with the offer, the new ways in which people learn about, experience and interact with food and brands need to be explored to enhance transparency, trust and engagement.

[1] http://pinchofyum.com/
[2] http://spoonuniversity.com/
[3] https://www.youtube.com/watch?v=q9VbtND-aNA
[4] http://lifehacker.com/top-10-youtube-channels-that-inspire-you-to-cook-1785967844
[5] https://www.youtube.com/user/JamiesFoodRevolution
[6] https://www.mooc-list.com/categories/food-and-nutrition
[7] http://blogs.cisco.com/digital/the-internet-of-food-improving-lives http://www.gmaonline.org/issues-policy/health-nutrition/smartlabeltm-consumer-information-transparency-initiative/
[8] https://www.crunchiesfood.com/traceability/
[9] http://www.blogto.com/restaurants/
[10] Advanis Expert Interviews
[11] https://thenextweb.com/opinion/2015/09/01/why-sharing-photos-of-food-is-about-more-than-whats-on-the-plate/#.tnw_x49Oe14m
[12] https://www.wired.com/2013/11/a-new-kind-of-food-science/

THE EXPERTS' VIEWS

THE PRODUCER

DEMAND

- Sales at farmers markets are growing in scale and scope.
- Customers want to know what they are eating and support the local economy.

ISSUES

- Farmers may not be attuned to diverse food preferences and the need for experimentation.

NEEDS & ADVICE

- Promote direct distribution channels to enhance transparency and support local farmers.
- Develop formal platform for collaboration between farmers and innovators (chefs, foodies).

THE CHEF

DEMAND

- Demand for local is growing at all tiers of RFS.
- Customers want a premium experience – willing to pay more for local, healthy.

ISSUES

- Customers need to be educated about *ugly* food and seasonality.
- Farmers may not have enough products, or enough variety.
- Sourcing may be difficult for small establishments, when the chef can't take time off.

NEEDS & ADVICE

- Collaborate with local farmers (directly or through associations) to help each other out – margins are low for both.
- Collaborate with other producers (winemaker, florist) to develop a premium experience.

THE DISTRIBUTOR

DEMAND

- Local is no longer a fad.
- Customers want to know where the food comes from, the story behind it.
- Safety and self-sufficiency are drivers.
- Producers are beginning to address ethnic needs (Asia and Indochina).

ISSUES

- Many local producers don't follow minimum safety standards.
- Technology for year-round production is costly/not available.

NEEDS & ADVICE

- Establish minimum safety standards for local producers (safety seal).
- Promote traditional roles of producers and distributors in the distribution channel.

THE CUSTOMER EXPERT

DEMAND

- Demand for local food is on the rise
- Consumers want higher quality, transparent, safe foods, with an interesting narrative

ISSUES

- Association of local with farming setting is stronger than with processed goods.
- Premiumization is more natural in processed goods – need to play the value-added of local produce

NEEDS & ADVICE

- Leverage new eating habits – people eating small meals on their own are more open to experimentation
- Reach out through traditional channels, but explore social media, particularly to tell the story.

APPENDIX

SEGMENTS DETAILS

Premium Food Seekers

With a large representation of Boomer females, this group is quite wealthy as most are employed and highly educate. Over half of households have multiple adults with no children. They eat mostly unprocessed foods. **Unconcerned about price, they are looking for fresh, flavourful, exotic food that suits their dietary preferences, while minimizing their negative social impact**. They are more likely than many to be swayed to try B.C. foods, but primarily by word of mouth or articles on farmers or on the benefits of the food.

PREMIUM FOOD SEEKERS

12% of all food shoppers

Descriptives

44%	(112)	*Baby Boomers*
64%	(126)	*Females*
52%	(116)	*Household with multi-adults, no children*
$96,817	(118)	*Average household income*
21%	(139)	*Rural*

Shopping Role

58%	(110)	*Shared shopping*

Purchase few times a week+

81%	(114)	*Unprocessed food*
37%	(77)	*Processed food*
20%	(80)	*Prepared food*

Food Shopping Attitudes

93%	(119)	*Fresh, safe food*
91%	(145)	*Socially conscious*
88%	(135)	*Label reader*
71%	(126)	*Exotic, flavourful foods*
39%	(123)	*Specialized diet*
10%	(16)	*Low prices*
7%	(37)	*On the go snacker*
5%	(15)	*Easy to prepare meals*

Media Preference / Consumption

Top 3: will try food based on…

80%	(116)	*Word of mouth*
57%	(136)	*Article on farmers*
53%	(115)	*Article on benefits*

Top 4: will notice food ads on…

29%	(110)	*Radio*
28%	(91)	*Social networks*
25%	(89)	*Cable or satellite TV*
25%	(111)	*Video streaming*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Premium Food Seekers

Many in this segment purchase B.C. foods to help the local economy, but also because it is better for the environment, of better quality, safer, and more likely to be organic. Over four-fifths purchase B.C. foods from farmer's markets or stands, nearly three-quarters purchase B.C. foods from specialty stores, and this group is one of the most likely to purchase B.C. foods through a harvest box service. **Labels and information are more important than competitive prices to entice this group to purchase more B.C. products**.

PREMIUM FOOD SEEKERS

12% of all food shoppers

Unprocessed Food bought often

88% (131)
69% (124)
58% (172)
80% (117)
69% (112)
33% (144)

Why purchase BC food

32% (105) *Fresher*
21% (219) *Better for environment*
17% (150) *Better Quality*

Processed Food bought often

53% (106)
30% (133)
26% (127)
15% (131)
51% (115)
29% (134)
21% (125)
11% (183)

Why purchase BC food

20% (154) *Better quality*
18% (288) *Better for environment*
13% (91) *Fresher*

Prepared Food bought sometimes+

Purchases from…

91% (98) *Eating establishments*
58% (84) *Supermarkets*
55% (119) *Farmers' markets*
12% (48) *Convenience stores*
6% (74) *Food delivery*
5% (71) *Subscription services*

Top Sales Channels other than supermarkets

82% (126) *Farmers' market*
70% (119) *Specialty shop*
47% (98) *Hypermarket or club*
13% (162) *Harvest box service*

Strategies

93% (111) *Clear labeling*
81% (93) *Competitive prices*
84% (127) *Product information*
84% (112) *Seal would buy more*

Restaurant Choice (often/sometimes)

78% (123) *Orders food with B.C. ingredients at a restaurant*
71% (134) *Chooses a restaurant that sources B.C. ingredients*
63% (114) *Orders B.C. alcoholic beverages at a restaurant*

Initiatives to eat B.C. food at restaurants

83% (112) *Clear indication that ingredients/beverages from BC*
75% (94) *Competitive prices*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Healthy Meal Cooks

This segment has a high representation of Boomer females, with a lower level of education and average income than the regional average. They are the least likely to have children in the household and over one-fifth live in a rural area. **Unconcerned about convenience, they are the least likely to eat processed or prepared foods, looking for fresh, safe ingredients to prepare healthy meals from scratch**. They are more likely than many to be swayed to try B.C. foods in multiple ways, and to notice ads in multiple media channels.

HEALTHY MEAL COOKS

8% of all food shoppers

Descriptives

71%	(180)	*Baby Boomers*
62%	(123)	*Females*
60%	(134)	*Household with multi-adults, no children*
$70,542	(86)	*Average household income*
22%	(147)	*Rural*

Shopping Role

54%	(127)	*Sole shopper*

Purchase few times a week+

68%	(97)	*Unprocessed food*
35%	(72)	*Processed food*
7%	(27)	*Prepared food*

Food Shopping Attitudes

96%	(124)	*Fresh, safe food*
92%	(147)	*Socially conscious*
91%	(139)	*Label reader*
83%	(139)	*Low prices*
44%	(78)	*Exotic, flavourful foods*
26%	(84)	*Specialized diet*
6%	(32)	*On the go snacker*
0%	(0)	*Easy to prepare meals*

Media Preference / Consumption

Top 3: will try food based on…

76%	(110)	*Word of mouth*
61%	(132)	*Article on benefits*
61%	(146)	*Article on farmers*

Top 4: will notice food ads on…

45%	(157)	*Cable or satellite TV*
39%	(145)	*Radio*
31%	(101)	*Social networks*
21%	(93)	*Video streaming*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Healthy Meal Cooks

Many in this group purchase B.C. foods to help the local economy, because they want to know where their food comes from, and because it is better for the environment. Many purchase BC food from farmer's markets or stands and from specialty stores. Nearly one-fifth purchase through a harvest box service, and nearly two-thirds would order a meal featuring B.C. ingredients at a restaurant. **Clear labeling and product information are relatively more important than price to entice this group to buy B.C. food products**.

HEALTHY MEAL COOKS

8% of all food shoppers

Unprocessed Food bought often

92% (137)
81% (132)
49% (146)
84% (123)
77% (139)
45% (198)

Why purchase BC food

26% (88) *Fresher*
15% (136) *Better quality*
14% (171) *Know their origin*

Processed Food bought often

60% (136)
34% (160)
28% (125)
21% (179)
59% (117)
30% (144)
26% (159)
5% (83)

Why purchase BC food

16% (112) *Fresher*
13% (181) *Know their origin*
11% (169) *Better for environment*

Prepared Food bought sometimes+

Purchases from…

86% (93) *Eating establishments*
51% (74) *Supermarkets*
46% (99) *Farmers' markets*
11% (43) *Convenience stores*
5% (69) *Subscription services*
4% (45) *Food delivery*

Restaurant Choice (often/sometimes)

74% (116) *Orders food with B.C. ingredients at a restaurant*
60% (114) *Chooses a restaurant that sources B.C. ingredients*
56% (100) *Orders B.C. alcoholic beverages at a restaurant*

Initiatives to eat B.C. food at restaurants

87% (117) *Clear indication that ingredients/beverages from BC*
82% (103) *Competitive prices*

Top Sales Channels other than supermarkets

81% (124) *Farmer's market*
49% (102) *Hypermarket or club*
66% (112) *Specialty shop*
17% (226) *Harvest box service*

Strategies

92% (110) *Clear labeling*
88% (102) *Competitive prices*
90% (119) *Seal would buy more*
82% (124) *Product information*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Convenient Local Meal Proponent

This segment has a large representation of Boomer females. Over one-third are retired, with one-quarter being single adults with no children. Over three-quarters in this group buys unprocessed foods a few times a week or more. At their life stage, they are **looking for meals that are tasty, healthy and easy to prepare. Socially conscious, they seek to support the local economy with their food purchases**. They are more likely than many to be swayed to try B.C. foods, and by most media channels.

CONVENIENT LOCAL MEAL PROPONENT
8% of all food shoppers

Descriptives

43%	(110)	*Baby Boomers*
58%	(114)	*Females*
29%	(131)	*Household with single adult, no children*
$68,974	(84)	*Average household income*
38%	(113)	*Large urban city*

Shopping Role

48%	(113)	*Sole shopper*

Purchase few times a week+

77%	(109)	*Unprocessed food*
49%	(103)	*Processed food*
25%	(101)	*Prepared food*

Food Shopping Attitudes

100%	(298)	*Easy to prepare meals*
93%	(120)	*Fresh, safe food*
89%	(141)	*Socially conscious*
78%	(119)	*Label reader*
73%	(122)	*Low prices*
62%	(110)	*Exotic, flavourful foods*
44%	(141)	*Specialized diet*
23%	(126)	*On the go snacker*

Media Preference / Consumption

Top 3: will try food based on…

77%	(111)	*Word of mouth*
66%	(143)	*Article on benefits*
63%	(150)	*Article on farmers or producers*

Top 4: will notice food ads on…

42%	(147)	*Cable or satellite TV*
33%	(124)	*Radio*
31%	(100)	*Social networks*
30%	(229)	*General interest magazines*

(Percentage in Segment / Index) Index over 110 / Index under 90

Convenient Local Meal Proponent

This segment purchases B.C. foods to help the local economy and because they want to know where their food comes from. This segment is the most likely to purchase natural health products and plant-based proteins at least once a month. Nearly three-quarters purchase B.C. processed and unprocessed food from farmer's markets or stands and over one quarter purchase it from convenience stores. **A logo identifying B.C. food, in addition to product information, would make vast majority of this group more inclined to buy B.C. food**.

CONVENIENT LOCAL MEAL PROPONENT
8% of all food shoppers

Unprocessed Food bought often

78% (117)
70% (113)
42% (186)
75% (109)
66% (120)
33% (99)

Why purchase BC food

29% (95)	Fresher	
11% (134)	Know their origin	
11% (99)	Better Quality	

Processed Food bought often

62% (122)
33% (152)
27% (160)
23% (102)
58% (132)
31% (152)
23% (193)
10% (161)

Why purchase BC food

16% (114)	Fresher
13% (95)	Good value for money
12% (175)	Know their origin

Prepared Food bought sometimes+

Purchases from…

93% (100)	Eating establishments
65% (95)	Supermarkets
54% (118)	Farmers' markets
20% (84)	Convenience stores
13% (196)	Subscription services
7% (82)	Food delivery

Restaurant Choice (often/sometimes)

69% (108)	Orders food with B.C. ingredients at a restaurant
63% (120)	Chooses a restaurant that sources B.C. ingredients
53% (95)	Orders B.C. alcoholic beverages at a restaurant

Initiatives to eat B.C. food at restaurants

82% (104)	Competitive prices
83% (112)	Clear indication that ingredients/beverages from BC

Top Sales Channels other than supermarkets

74% (113)	Farmers' market
48% (101)	Hypermarket or club
64% (108)	Specialty shop
27% (134)	Convenience store

Strategies

89% (118)	Seal would buy more
85% (98)	Competitive prices
88% (105)	Clear labeling
74% (113)	Product information

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Socially Conscious Adventurers

This segment has a large representation of Gen X. They are the most likely to have children in the household, and the second most likely to eat unprocessed foods a few times a week or more. **With an adventurous taste, but a specialized diet and a concern about the impact of their food choices, this segment avidly looks for information on the products they purchase**. They are more likely than the average to respond to ads on video streaming and video sharing networks.

SOCIALLY CONSCIOUS ADVENTURERS
9% of all food shoppers

Descriptives

41%	(122)	*Gen X*
51%	(104)	*Males*
43%	(130)	*Household with children*
$76,765	(94)	*Average household income*
39%	(111)	*Small urban city*

Shopping Role

57%	(108)	*Shared shopping*

Purchase few times a week+

79%	(112)	*Unprocessed food*
49%	(103)	*Processed food*
24%	(95)	*Prepared food*

Food Shopping Attitudes

92%	(142)	*Label reader*
88%	(113)	*Fresh, safe food*
81%	(129)	*Socially conscious*
79%	(141)	*Exotic, flavourful foods*
77%	(128)	*Low prices*
48%	(154)	*Specialized diet*
23%	(125)	*On the go snacker*
0%	(0)	*Easy to prepare meals*

Media Preference / Consumption

Top 3: will try food based on…

76%	(110)	*Word of mouth*
51%	(109)	*Article on benefits*
40%	(109)	*Reviews on social media*

Top 4: will notice food ads on…

32%	(104)	*Social networks*
29%	(109)	*Radio*
25%	(111)	*Video streaming networks*
23%	(114)	*Video sharing network*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Socially Conscious Adventurers

This segment is the most likely to view purchasing B.C. grown and raised unprocessed foods as being better for the environment. Nearly three-quarters purchase B.C. food from farmers' markets or stands and from specialty stores, and are likely to order B.C. food at a restaurant. This segment is **likely to purchase more B.C. foods if they are competitively priced, clearly labeled, and if they received product information**.

SOCIALLY CONSCIOUS ADVENTURERS
9% of all food shoppers

Unprocessed Food bought often

80% (119) · 63% (114) · 36% (106)
77% (112) · 61% (99) · 27% (120)

Why purchase BC food

- 33% (109) *Good value for money*
- 15% (161) *Better for environment*
- 11% (126) *Know their origin*

Processed Food bought often

51% (101) · 27% (120) · 20% (92) · 13% (76)
43% (97) · 20% (99) · 14% (116) · 7% (111)

Why purchase BC food

- 14% (104) *Better quality*
- 12% (113) *Availability*
- 10% (72) *Fresher*

Prepared Food bought sometimes+

Purchases from...

- 95% (103) *Eating establishments*
- 6% (93) *Subscription services*
- 70% (102) *Supermarkets*
- 49% (107) *Farmers' markets*
- 26% (108) *Convenience stores*
- 7% (83) *Food delivery*

Restaurant Choice (often/sometimes)

- 72% (130) *Orders B.C. alcoholic beverages at a restaurant*
- 62% (118) *Chooses a restaurant that sources B.C. ingredients*
- 74% (116) *Orders food with B.C. ingredients at a restaurant*

Initiatives to eat B.C. food at restaurants

- 86% (109) *Competitive prices*
- 80% (105) *Promotions and discounts*

Top Sales Channels other than supermarkets

- 72% (123) *Specialty shop*
- 70% (108) *Farmer's market*
- 50% (103) *Hypermarket or club*
- 22% (109) *Convenience store*

Strategies

- 93% (107) *Competitive prices*
- 86% (103) *Clear labeling*
- 78% (103) *Seal would buy more*
- 75% (114) *Product information*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Fresh, Natural Eaters

This segment has a high representation of Boomer females who are the primary shopper for their household. More than one-half of households have multiple adults with no children living in them. Nearly one-fifth live in a rural area. Only one in eight eats prepared foods a few times a week or more. **Concerned about eating healthy, safe and nutritious food, they read product labels to identify product ingredients and source.** Word of mouth and traditional media channel are more likely than digital media to successfully reach this segment.

FRESH, NATURAL EATERS
12% of all food shoppers

Descriptives

52%	(132)	*Baby Boomers*
56%	(110)	*Females*
52%	(116)	*Household with multi-adults, no children*
$81,397	(99)	*Average household income*
18%	(120)	*Rural*

Shopping Role

48%	(113)	*Sole shopper*

Purchase few times a week+

75%	(106)	*Unprocessed food*
40%	(84)	*Processed food*
13%	(50)	*Prepared food*

Food Shopping Attitudes

92%	(141)	*Label reader*
83%	(107)	*Fresh, safe food*
67%	(113)	*Low prices*
57%	(91)	*Socially conscious*
42%	(74)	*Exotic, flavourful foods*
29%	(93)	*Specialized diet*
8%	(25)	*Easy to prepare meals*
2%	(12)	*On the go snacker*

Media Preference / Consumption

Top 3: will try food based on…

66%	(96)	*Word of mouth*
43%	(93)	*Article on benefits*
40%	(96)	*Article on farmers/ Producers*

Top 4: will notice food ads on…

27%	(88)	*Social networks*
26%	(92)	*Cable or satellite TV*
22%	(84)	*Radio*
17%	(76)	*Video streaming*

(Percentage in Segment / Index) Index over 110 / Index under 90

Fresh, Natural Eaters

This segment perceives food that is grown, raised or produced in B.C. to be fresher, of better quality, and better for the environment. Their unlikely purchases of prepared foods are primarily from eating establishments, where they are likely to order a meal that includes B.C. grown and raised ingredients. **In addition to pricing initiatives, this segment is more likely to purchase more B.C. foods if they received more product information**.

FRESH, NATURAL EATERS
12% of all food shoppers

Unprocessed Food bought often

75% (111) | 63% (103) | 38% (112)
72% (105) | 62% (112) | 20% (86)

Why purchase BC food

- 39% (131) *Fresher*
- 14% (121) *Better quality*
- 13% (140) *Better for environment*

Processed Food bought often

57% (113) | 23% (107) | 20% (98) | 13% (114)
51% (115) | 21% (93) | 17% (101) | 5% (89)

Why purchase BC food

- 17% (128) *Better quality*
- 17% (120) *Fresher*
- 14% (103) *Good value for money*

Prepared Food bought sometimes+

Purchases from…

- 88% (95) *Eating establishments*
- 2% (26) *Subscription services*
- 60% (88) *Supermarkets*
- 37% (81) *Farmers' markets*
- 16% (64) *Convenience stores*
- 5% (60) *Food delivery*

Restaurant Choice (often/sometimes)

- 46% (83) *Orders B.C. alcoholic beverages at a restaurant*
- 43% (82) *Chooses a restaurant that sources B.C. ingredients*
- 59% (93) *Orders food with B.C. ingredients at a restaurant*

Initiatives to eat B.C. food at restaurants

- 76% (96) *Competitive prices*
- 75% (101) *Clear indication that ingredients/beverages from BC*

Top Sales Channels other than supermarkets

- 60% (93) *Farmer's market*
- 56% (116) *Hypermarket or club*
- 52% (88) *Specialty shop*
- 18% (88) *Convenience store*

Strategies

- 92% (106) *Competitive prices*
- 85% (101) *Clear labeling*
- 76% (102) *Seal would buy more*
- 74% (112) *Product information*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

On the Go Label Readers

This segment has a high representation of Gen X and Boomer males with more South Asians than most. Highly educated, most are employed with higher than average income. Less than one-third of households have children. More likely than average to buy processed and prepared food, and **often on the go**, they **seek out ingredient listings and products that support special diets**, feeling that B.C. processed or manufactured foods are safer. They are likely to be influenced to try new foods by word of mouth.

ON THE GO LABEL READERS

8% of all food shoppers

Descriptives

37%	(110)	*Gen X*
66%	(134)	*Males*
27%	(124)	*Household with single adult, no children*
$94,580	(116)	*Average household income*
20%	(124)	*Small town*

Shopping Role

57%	(109)	*Shared shopping*

Purchase few times a week+

70%	(100)	*Unprocessed food*
53%	(111)	*Processed food*
33%	(130)	*Prepared food*

Food Shopping Attitudes

77%	(118)	*Label reader*
73%	(95)	*Fresh, safe food*
64%	(102)	*Socially conscious*
58%	(103)	*Exotic, flavourful foods*
41%	(130)	*Specialized diet*
27%	(81)	*Easy to prepare meals*
23%	(124)	*On the go snacker*
4%	(6)	*Low prices*

Media Preference / Consumption

Top 3: will try food based on…

70%	(101)	*Word of mouth*
40%	(95)	*Article on farmers/ Producers*
40%	(85)	*Article on benefits*

Top 4: will notice food ads on…

32%	(104)	*Social networks*
24%	(90)	*Radio*
24%	(82)	*Cable or satellite TV*
21%	(105)	*Video sharing*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

On the Go Label Readers

Over half of this segment eats processed foods a few times a week or more, consuming baked goods, alcoholic drinks and plant-based proteins more than the average. They buy B.C. food to help the local economy and because it is fresher, when available.
Over half of this segment purchase B.C. prepared food from farmers' markets or stands.
Avid label-readers, they would respond positively to local food labeling initiatives.

ON THE GO LABEL READERS
8% of all food shoppers

Unprocessed Food bought often

70% (101)
53% (85)
29% (85)
65% (97)
46% (83)
22% (98)

Why purchase BC food

37% (123)	Fresher
12% (103)	Better quality
10% (108)	Better for environment

Processed Food bought often

56% (111)
26% (118)
19% (87)
10% (176)
43% (98)
20% (97)
17% (104)
10% (85)

Why purchase BC food

16% (113)	Fresher
14% (107)	Better quality
13% (125)	Availability

Available

Prepared Food bought sometimes+

Purchases from…

91% (98)	Eating establishments
8% (115)	Subscription services
69% (100)	Supermarkets
54% (118)	Farmers' markets
26% (107)	Convenience stores
12% (145)	Food delivery

Restaurant Choice (often/sometimes)

66% (119)	Orders B.C. alcoholic beverages at a restaurant
56% (107)	Chooses a restaurant that sources B.C. ingredients
67% (106)	Orders food with B.C. ingredients at a restaurant

Initiatives to eat B.C. food at restaurants

79% (106)	Clear indication that ingredients/beverages from BC
66% (88)	Promotions and discounts

SALE

Top Sales Channels other than supermarkets

69% (107)	Farmer's market
45% (94)	Hypermarket or club
61% (102)	Specialty shop
18% (91)	Convenience store

BAKERY
STORE

Strategies

85% (101)	Clear labeling
77% (89)	Competitive prices
78% (104)	Seal would buy more
68% (104)	Product information

BC

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Selective Snackers

This segment includes primarily by Millennial and Gen X, with more South Asians and students than others, They also have the lowest income. Over one-quarter of households are single adults with no children. **Seeking convenience and affordability**, this group eats more prepared food than most. **Snackers on a special diet, they are avid label readers**. Moderately susceptible to media influence, they are more likely than most to respond to reviews on social media and ads on their social network.

SELECTIVE SNACKERS

9% of all food shoppers

Descriptives

36%	(133)	*Millennials*
55%	(108)	*Females*
28%	(128)	*Household with single adult, no children*
$67,700	(83)	*Average household income*
38%	(113)	*Large urban city*

Shopping Role

47%	(111)	*Sole shopper*

Purchase few times a week+

63%	(89)	*Unprocessed food*
50%	(104)	*Processed food*
34%	(136)	*Prepared food*

Food Shopping Attitudes

99%	(296)	*Easy to prepare meals*
85%	(142)	*Low prices*
83%	(127)	*Label reader*
75%	(97)	*Fresh, safe food*
63%	(101)	*Socially conscious*
52%	(92)	*Exotic, flavourful foods*
46%	(145)	*Specialized diet*
37%	(198)	*On the go snacker*

Media Preference / Consumption

Top 3: will try food based on…

65%	(95)	*Word of mouth*
51%	(109)	*Article on benefits*
48%	(130)	*Reviews on social media*

Top 4: will notice food ads on…

40%	(129)	*Social networks*
30%	(106)	*Cable or satellite TV*
25%	(93)	*Radio*
23%	(103)	*Video streaming networks*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Selective Snackers

Their consumption of B.C. food is lower than average. Although helping the local economy is very important to this segment, they are also most likely to buy unprocessed, processed or manufactured B.C. foods because it provides good value for the money. Convenience seekers, one-quarter of this group purchases unprocessed and processed B.C. food from convenience stores. **Competitive prices, clear labeling and promotions are likely to increase their purchase of B.C. products**.

SELECTIVE SNACKERS

9% of all food shoppers

Unprocessed Food bought often

60% (96)
58% (86)
22% (65)
59% (86)
42% (76)
19% (81)

Why purchase BC food

- 23% (221) *Good value for money*
- 21% (71) *Fresher*
- 10% (146) *Safer*

Processed Food bought often

47% (94)
19% (117)
15% (73)
12% (100)
34% (77)
17% (77)
14% (60)
9% (155)

Why purchase BC food

- 22% (168) *Good value for money*
- 12% (120) *Availability*
- 13% (95) *Fresher*

Prepared Food bought sometimes+

Purchases from...

- 96% (104) *Eating establishments*
- 9% (142) *Subscription services*
- 81% (118) *Supermarkets*
- 52% (112) *Farmers' markets*
- 41% (168) *Convenience stores*
- 7% (94) *Food delivery*

Top Sales Channels other than supermarkets

- 56% (86) *Farmer's market*
- 50% (105) *Hypermarket or club*
- 53% (90) *Specialty shop*
- 29% (142) *Convenience store*

Strategies

- 91% (105) *Competitive prices*
- 70% (94) *Seal would buy more*
- 81% (96) *Clear labeling*
- 61% (92) *Product information*

Restaurant Choice (often/sometimes)

- 54% (97) *Orders B.C. alcoholic beverages at a restaurant*
- 57% (108) *Chooses a restaurant that sources B.C. ingredients*
- 60% (95) *Orders food with B.C. ingredients at a restaurant*

Initiatives to eat B.C. food at restaurants

- 82% (104) *Competitive prices*
- 80% (106) *Promotions and discounts*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Price Conscious Foodies

This segment is made up of primarily Caucasian Millennial males who do some of the grocery shopping in their household. Over half of them work full time with higher than average income. Nearly half have children in the household. **Adventurous when it comes to eating, they love trying exotic foods with unique flavors**. They eat prepared foods more often than the average, and are the segment that eats processed foods the most. Not very susceptible to media influence, they are most likely to be persuaded to try new foods by word of mouth.

PRICE CONSCIOUS FOODIES

11% of all food shoppers

Descriptives

43%	(159)	*Millennials*
59%	(120)	*Males*
42%	(128)	*Household with children*
$97,905	(120)	*Average household income*
38%	(107)	*Small urban city*

Shopping Role

62%	(118)	*Shared shopping*

Purchase few times a week+

74%	(105)	*Unprocessed food*
62%	(131)	*Processed food*
32%	(129)	*Prepared food*

Food Shopping Attitudes

100%	(178)	*Exotic, flavourful foods*
68%	(114)	*Low prices*
65%	(83)	*Fresh, safe food*
38%	(61)	*Socially conscious*
27%	(41)	*Label reader*
20%	(107)	*On the go snacker*
16%	(51)	*Specialized diet*
0%	(0)	*Easy to prepare meals*

Media Preference / Consumption

Top 3: will try food based on…

68%	(99)	*Word of mouth*
37%	(81)	*Article on benefits*
35%	(96)	*Reviews on social media*

Top 4: will notice food ads on…

30%	(92)	*Social networks*
27%	(99)	*Radio*
24%	(106)	*Video streaming*
22%	(76)	*Cable or satellite TV*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Price Conscious Foodies

Although helping the local economy and eating fresh foods are the top reasons why this segment chooses B.C. grown, raised or processed food products, value for the money and availability are also important considerations. **Competitive prices are important to increase consumption of B.C. products**, although this is not the most price-sensitive segment. A "B.C. food" seal would have a moderate impact increasing their local food consumption.

PRICE CONSCIOUS FOODIES

11% of all food shoppers

Unprocessed Food bought often

67% (98)	57% (85)	35% (103)
61% (99)	54% (97)	10% (44)

Why purchase BC food

33%	(109)	*Fresher*
20%	(195)	*Good value for money*
13%	(178)	*Availability*

Processed Food bought often

45% (90)	25% (113)	15% (70)	7% (62)
35% (79)	17% (82)	11% (65)	2% (31)

Why purchase BC food

19%	(146)	*Good value for money*
15%	(146)	*Availability*
14%	(101)	*Fresher*

Prepared Food bought sometimes+

Purchases from…

98%	(106)	*Eating establishments*
6%	(84)	*Subscription services*
75%	(110)	*Supermarkets*
47%	(103)	*Farmers' markets*
29%	(120)	*Convenience stores*
14%	(170)	*Food delivery*

Restaurant Choice (often/sometimes)

57%	(103)	*Orders B.C. alcoholic beverages at a restaurant*
44%	(83)	*Chooses a restaurant that sources B.C. ingredients*
61%	(96)	*Orders food with B.C. ingredients at a restaurant*

Initiatives to eat B.C. food at restaurants

84%	(107)	*Competitive prices*
77%	(102)	*Promotions and discounts*

Top Sales Channels other than supermarkets

64%	(99)	*Farmer's market*
58%	(98)	*Specialty shop*
47%	(97)	*Hypermarket or club*
21%	(105)	*Convenience store*

Strategies

92%	(106)	*Competitive prices*
78%	(94)	*Clear labeling*
66%	(88)	*Seal would buy more*
50%	(75)	*Product information*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Subsistence Eaters

This segment has a large representation of Boomer males, with no interest in trying “exotic” foods. Although older, many still work. Less likely to have children at home, they have an average income for the region. **Eating to stay alive, price is their top consideration** when making food purchase decisions. Advertising may be less persuasive on this segment , who has low susceptibility to different media channels.

SUBSISTENCE EATERS

9% of all food shoppers

Descriptives

41%	(103)	*Baby Boomers*
57%	(116)	*Males*
49%	(110)	*Household with multi-adults, no children*
$77,205	(94)	*Average household income*
41%	(117)	*Small urban city*

Shopping Role

52%	(100)	*Shared shopping*

Purchase few times a week+

65%	(92)	*Unprocessed food*
49%	(102)	*Processed food*
23%	(93)	*Prepared food*

Food Shopping Attitudes

64%	(108)	*Low prices*
63%	(81)	*Fresh, safe food*
33%	(53)	*Socially conscious*
17%	(27)	*Label reader*
16%	(52)	*Specialized diet*
14%	(76)	*On the go snacker*
0%	(1)	*Easy to prepare meals*
0%	(0)	*Exotic, flavourful foods*

Media Preference / Consumption

Top 3: will try food based on…

52%	(75)	*Word of mouth*
33%	(72)	*Article on benefits*
28%	(77)	*Ad about BC product*

Top 4: will notice food ads on…

30%	(96)	*Social networks*
27%	(94)	*Cable or satellite TV*
17%	(63)	*Radio*
16%	(71)	*Video streaming*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Subsistence Eaters

Less likely to buy local foods in general, this segment's most frequent local purchases are eggs and dairy products. Although helping the local economy and eating fresh foods are the top reasons why they choose to buy local foods, value for the money and availability are also important considerations. A hypermarket shopper, unlikely to be influenced by the availability of local products when making dining choices, this segment **would respond primarily to competitive prices to increase local food purchases**.

SUBSISTENCE EATERS
9% of all food shoppers

Unprocessed Food bought often

65% (94)	45% (68)	19% (56)
60% (96)	38% (69)	11% (46)

Why purchase BC food

23%	(75)	Fresher
14%	(132)	Good value for money
12%	(163)	Availability

Processed Food bought often

44% (99)	19% (90)	12% (57)	3% (26)
42% (84)	14% (62)	10% (62)	1% (10)

Why purchase BC food

16%	(117)	Fresher
16%	(119)	Good value for money
11%	(104)	Availability

Prepared Food bought sometimes+

Purchases from…

89%	(97)	Eating establishments
4%	(59)	Subscription services
71%	(103)	Supermarkets
36%	(79)	Farmers' markets
25%	(104)	Convenience stores
9%	(114)	Food delivery

Restaurant Choice (often/sometimes)

42%	(77)	Orders B.C. alcoholic beverages at a restaurant
31%	(58)	Chooses a restaurant that sources B.C. ingredients
47%	(74)	Orders food with B.C. ingredients at a restaurant

Initiatives to eat B.C. food at restaurants

80%	(101)	Competitive prices
73%	(97)	Promotions and discounts

Top Sales Channels other than supermarkets

51%	(106)	Hypermarket or club
48%	(74)	Farmer's market
47%	(80)	Specialty shop
17%	(87)	Convenience store

Strategies

81%	(93)	Competitive prices
73%	(87)	Clear labeling
62%	(82)	Seal would buy more
47%	(71)	Product information

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Kitchen Strangers

This segment has a high representation of Millennial males and the second highest proportion of students. **On the go snackers, looking for convenience and affordability**, they are significantly more likely than most to buy processed and prepared, rather than unprocessed, food. Less susceptibility to being swayed to try B.C. foods by different media channels, they are more likely them most to consume video content.

KITCHEN STRANGERS

12% of all food shoppers

Descriptives

- **46%** (170) *Millennials*
- **55%** (113) *Males*
- **30%** (136) *Household with single adult, no children*
- **$77,569** (95) *Average household income*
- **18%** (112) *Small town*

Shopping Role

- **46%** (108) *Sole shopper*

Purchase few times a week+

- **54%** (77) *Unprocessed food*
- **54%** (114) *Processed food*
- **39%** (156) *Prepared food*

Food Shopping Attitudes

- **100%** (299) *Easy to prepare meals*
- **73%** (121) *Low prices*
- **53%** (68) *Fresh, safe food*
- **49%** (87) *Exotic, flavourful foods*
- **34%** (181) *On the go snacker*
- **30%** (48) *Socially conscious*
- **16%** (24) *Label reader*
- **15%** (47) *Specialized diet*

Media Preference / Consumption

Top 3: will try food based on...

- **62%** (89) *Word of mouth*
- **35%** (96) *Reviews on social media*
- **34%** (74) *Article on benefits*

Top 4: will notice food ads on...

- **32%** (104) *Social networks*
- **28%** (99) *Cable or satellite TV*
- **26%** (126) *Video sharing*
- **26%** (114) *Video streaming*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

Kitchen Strangers

This segment is the most likely to buy prepared meals, from multiple channels, and least likely to eat unprocessed foods. Although helping the local economy is important, they look for value for money and availability when buying B.C. products. Over one-third of them purchases B.C. food from convenience stores. **Price-based initiatives targeted at prepared food establishments** are the most likely to succeed with this segment.

KITCHEN STRANGERS

12% of all food shoppers

Unprocessed Food bought often

- 44% (71)
- 38% (56)
- 16% (48)
- 43% (63)
- 37% (68)
- 7% (32)

Why purchase BC food

- 25% (84) *Fresher*
- 13% (124) *Good value for money*
- 12% (159) *Availability*

Processed Food bought often

- 37% (72)
- 17% (80)
- 10% (47)
- 3% (23)
- 28% (63)
- 17% (75)
- 9% (53)
- 1% (21)

Why purchase BC food

- 21% (159) *Good value for money*
- 12% (112) *Availability*
- 10% (72) *Fresher*

Prepared Food bought sometimes+

Purchases from…

- 96% (104) *Eating establishments*
- 11% (167) *Subscription services*
- 83% (121) *Supermarkets*
- 34% (74) *Farmers' markets*
- 36% (147) *Convenience stores*
- 10% (127) *Food delivery*

Restaurant Choice (often/sometimes)

- 48% (86) *Orders B.C. alcoholic beverages at a restaurant*
- 42% (81) *Chooses a restaurant that sources B.C. ingredients*
- 50% (78) *Orders food with B.C. ingredients at a restaurant*

Initiatives to eat B.C. food at restaurants

- 80% (101) *Competitive prices*
- 77% (102) *Promotions and discounts*

Top Sales Channels other than supermarkets

- 50% (85) *Specialty shop*
- 50% (77) *Farmer's market*
- 38% (80) *Hypermarket or club*
- 27% (133) *Convenience store*

Strategies

- 85% (98) *Competitive prices*
- 77% (92) *Clear labeling*
- 62% (83) *Seal would buy more*
- 48% (73) *Product information*

(Percentage in Segment / Index) *Index over 110* / *Index under 90*

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