



'Natural'

What does it mean to consumers?

April 2018

Canada

The 'Natural' trend

Consumers are more conscious than ever about the safety and trustworthiness of food and drink, which has led to an increase in the use of natural, as well as ethical and environmental claims in food and drink innovation.

In the Ipsos FIVE database, Individuals seeking natural real food products report increasing consumption of products with an organic claim (+41%), a non-GMO claim (+44%) and a Locally Sourced claim (+12%) since 2014. In contrast, the rate of Canadians reporting a product choice with a No Artificial Ingredients / Preservatives claim has held steady over the past 4 years.

The 'All Natural' claim has declined in importance since 2014 (-29%) as Canadians increasingly look for more specificity and certifications in claims of importance.

Food and Drink manufacturers are having to become more open about their ingredients, production processes, and supply chains.

Ultimately, this helps consumers feel more confident about the safety and purity of the food and drink that they purchase.



Kale-O's Sweet Chilli and Mint Kale crisps are organic green kale leaves with fresh mint, cayenne chilli and olive oil dressing. It is free from gluten, nuts, trans fats and is organic. The packet is also compostable

What does the word 'natural' mean to consumers?

We asked consumers across 28 countries what the term 'natural' meant to them if communicated on food or drink packaging.

Most commonly associated attributes

	Global	Canada
1	Without artificial ingredients 52%	Without artificial ingredients 60%
2	100% from nature 44%	100% from nature 46%
3	Healthy 43%	Unprocessed 43%

Least commonly associated attributes

	Global	Canada
1	Not mass produced 6%	Not mass produced 5%
2	Ethically produced 9%	Ethically produced 6%
3	Locally sourced 10%	Not mass produced 6%

There are more consistencies than differences across the 28 markets

'Without artificial ingredients' is the most common attribute associated across the markets (the most common association in **18 of the 28** markets)

Some market differences



In Germany 'Sustainably produced' is the 4th most common association (**23%**) – this is **higher** than all other markets.



In Saudi Arabia and Hungary, 'Allergen Free' is the 4th most common association (**16%** and **13%**). 7 other markets have 13% of the population or more associating natural with 'Allergen Free'. It is most common in Peru (**19%**)



In China and Serbia, 'Ethically produced' is the 5th most common association (**19%** and **12%**) – For China, this is **higher** than all other markets. 4 other markets in addition to China and Serbia have 12% of the population or more associating natural with 'Ethically produced'.

There are some regional variations in the association of the term 'natural'

North America is significantly more likely to associate natural with 'without artificial ingredients' (57%) and 'unprocessed' (41%)

The region is less likely to associate natural with allergen free (6%)

LATAM is significantly more likely to associate natural with 'healthy' (59%), and less likely to associate natural with 'mass produced' (4%)

Europe is significantly less likely to associate 'natural with 'organic' (21%)

APAC is significantly more likely to associate natural with 'authentic' (23%)

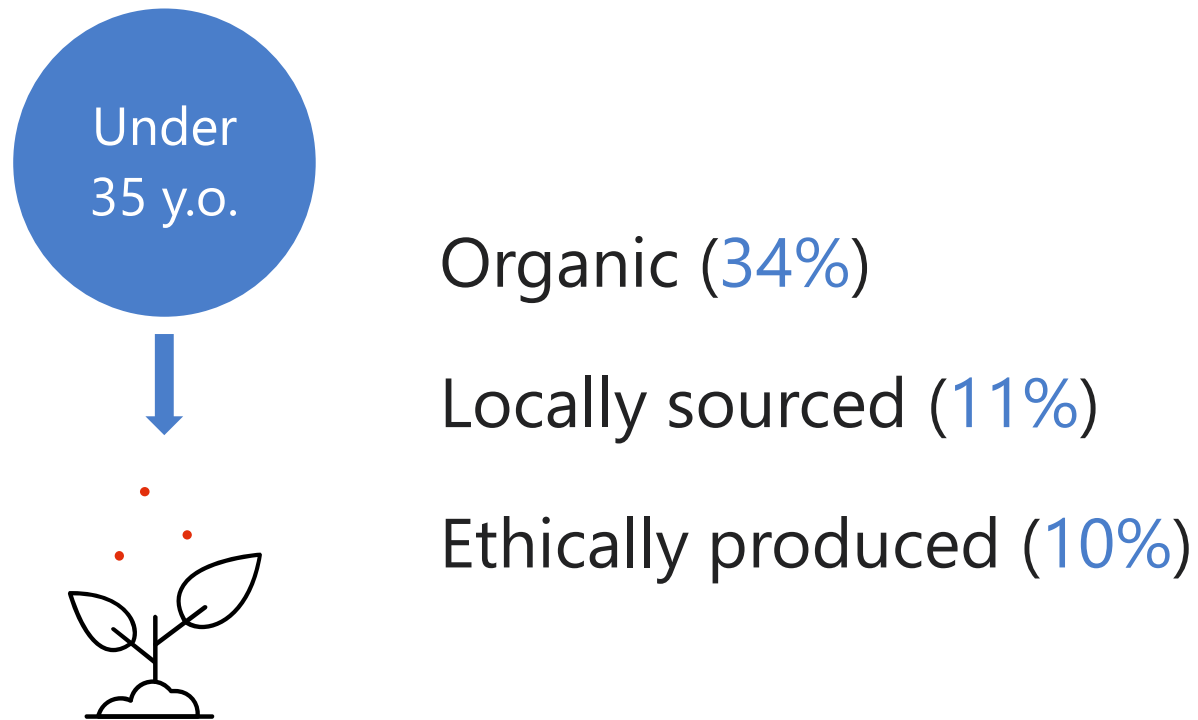


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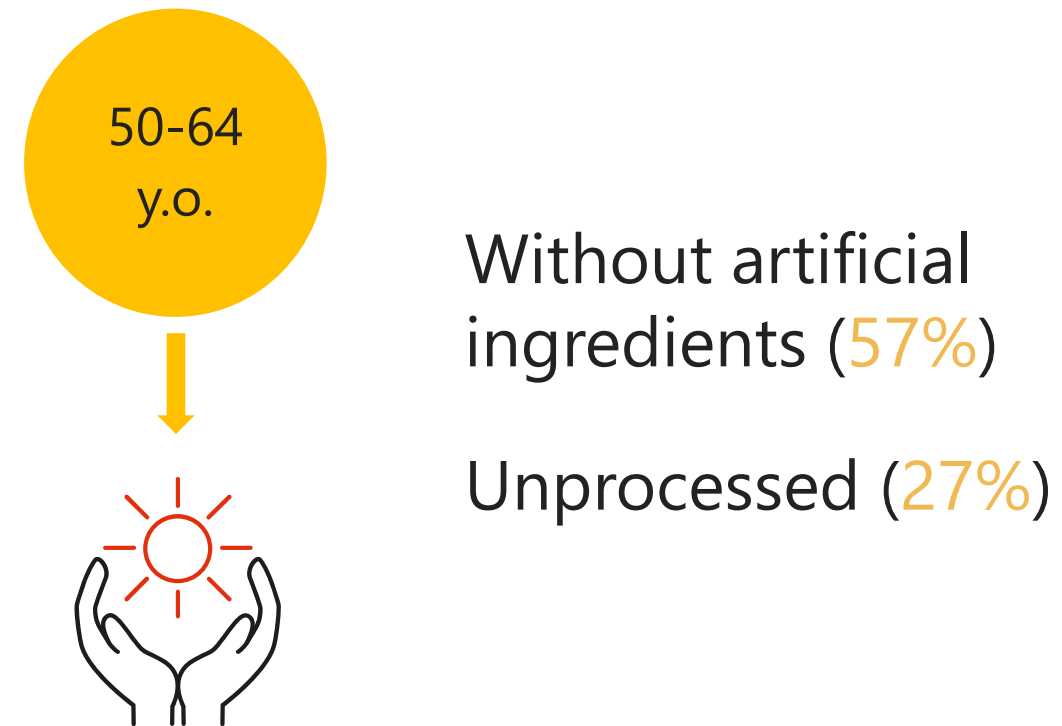
Source: Ipsos MORI Global Advisor Survey. N=14002 28 countries

Whilst younger age groups associate 'natural' more with organic, older age groups focus on the ingredients

(Significantly more likely to associate 'natural' with... (vs. 35-64))



(Significantly more likely to associate 'natural' with...(vs. under 35 and 35-49))



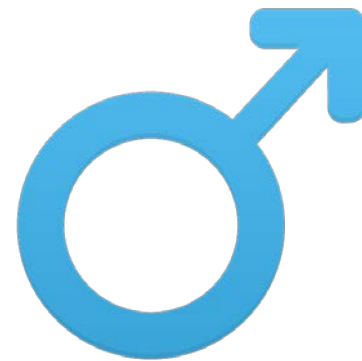
Females are significantly more likely to focus on the ingredients vs. males. Males are significantly more likely to associate natural with authentic

(Significantly more likely to associate 'natural' with... (vs. males))



Without artificial ingredients (54%)
Healthy (44%)
Unprocessed (28%)

(Significantly more likely to associate 'natural' with... (vs. females))



Authentic (19%)

In Canada, we see some significant differences across age group and gender

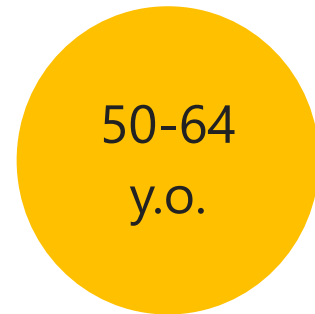


Under
35 y.o.

Significantly more likely to associate 'natural' with... (vs. 35-64)

Authentic (vs under 50 only) (22%)

Organic (vs over 50 only) (22%)



50-64
y.o.

Significantly more likely to associate 'natural' with... (vs. under 35)

100% from nature (50%)



Significantly more likely to associate 'natural' with... (vs. Male)

Unprocessed (51%)



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