

Canadian Soy Use and Attitude Study October 2007

Method

- This survey employs our proprietary nationally representative panel of internet users (Primary Grocery Shoppers)
- The survey was developed, conducted and analyzed by BrandTrust on behalf of Soy 20/20
- The questions parallel the core data set developed by US soy growers for their annual tracking study
- The data are drawn from an on-line survey of 1008 Canadian adults
- Variations in the data of 5 percentage points can be considered to indicate true variation 19 times out of 20

Major food trends

Health



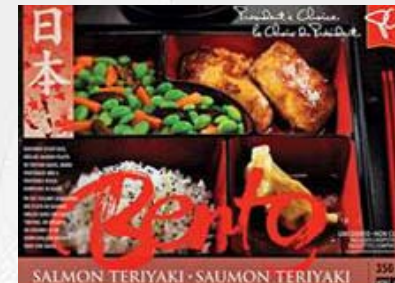
- Weight loss
- Heart health
- Anti-aging
- Allergies
- Organic & Natural

Convenience



- Fresh
- Fast and easy prep
- Precooked and chilled
- Premium ingredients
- Re-seal/easy open
- Quick cleanup

Choice



- Food Theatre
- Menu merchandising
- Exotic flavours
- Constant innovation
- Speed to market

Canadians relate their health to their diets

85%

Canadians claiming they've changed their eating habits within the *past 5 years*, due to health concerns



We're watching the foods we buy

- **84%**
Adult Canadians claiming they're committed to a personal **health and diet** regime
- **52%**
Adults 35+ who are concerned about **fat and cholesterol**
- **46%**
24-25 year olds watching their fat and cholesterol intake!



Shopping influences

- **93%**

Canadians claiming to review nutritional content when they're grocery shopping

- **67%**

Adult Canadians unlikely to buy a product listing transfat on the label!



Consumers age 55+

Also concerned most with

- **41%** sodium
- **21%** fibre



What we're watching

% monitoring each factor in their diet	TOTAL	Age of PGS			Income		
		25-34	35-54	55+	LT50	50-79	80+
fat or cholesterol	50	46	52	52	46	51	56
trans fats	42	36	44	47	38	41	51
calories	29	31	29	29	29	29	30
salt (sodium)	29	19	31	41	28	31	28
sugar	21	19	22	22	21	24	18
fibre	16	13	17	21	19	17	11
carbohydrates	9	11	9	6	10	11	6
genetically modified foods	8	9	8	8	8	8	9
organic foods	7	12	5	6	8	6	7
gluten	1	1	1	1	1	0	1
isoflavones	1	1	-	2	0	1	1
none of the above	10	13	9	9	11	8	9

Voting with our wallets

73% of Canadians say they are prepared to *pay more* for healthy foods



What Canadians connect most to soy

Beverage	66%	} 85%
Food	19%	
Black Sauce for Asian food	9%	
Livestock feed	4%	
Cooking oil	1%	
Personal care products	1%	



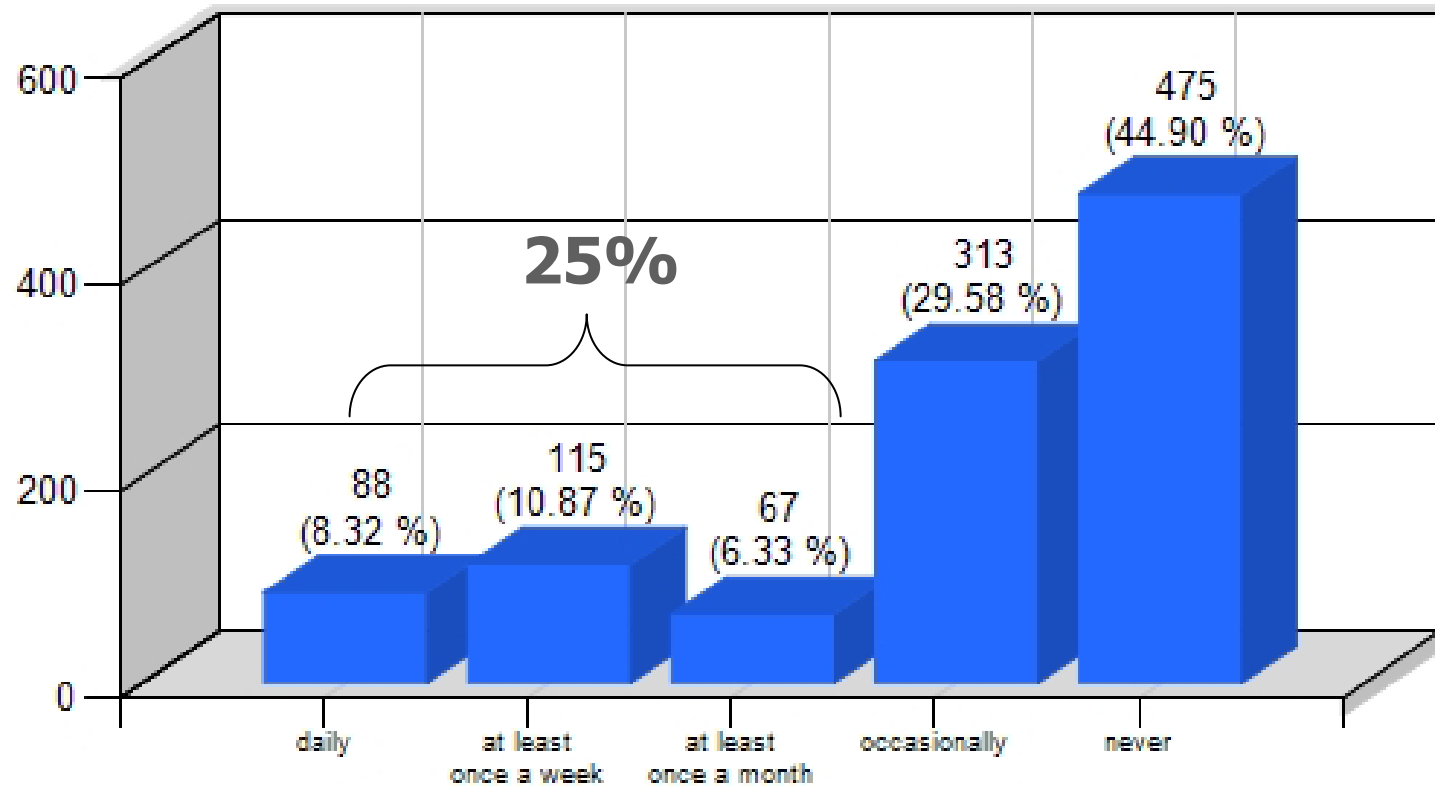
Good news for soy foods

25% of Canadian adults claim
they consume soy as a food
or beverage

at least once a month!



I typically consume soy food or beverages:



Soy - healthy associations

- **71%**
Rate soy products as *healthy*
- **50%**
Believe soy foods can play a role in reducing obesity



Issue for soy foods

43% of Canadians believe
soy tastes awful



Opportunity gap

36% Canadians **are** interested in combinations of soy and conventional food;
ie ground meat/soy product

Remember - just 19% think of soy as food today!



Comparison- Canadians vs Americans		BRANDTRUST	
		Canada	US
<ul style="list-style-type: none"> Concerned about nutritional content when selecting groceries. 		93%	90%
<ul style="list-style-type: none"> Changed eating habits in the past three to five years due to health concerns. 		85%	75%
<ul style="list-style-type: none"> Willing to pay more for healthy foods 		73%	60%
<ul style="list-style-type: none"> Unlikely to purchase foods with trans fat listed on the label 		67%	45%
<ul style="list-style-type: none"> Soy-based foods can play a role in reducing obesity 		50%	60%
<ul style="list-style-type: none"> Rate soy products as healthy 		71%	85%
<ul style="list-style-type: none"> Interested in a combination ground meat/soy product 		36%	50%
<ul style="list-style-type: none"> Consume soy foods or soy beverages once a month or more. 		25%	33%
<ul style="list-style-type: none"> Think of Soy as ; Beverage 		66%	N/A
	Food	19%	N/A
	Black Sauce (for Asian food)	9%	N/A
	Livestock feed	4%	N/A
	Cooking oil	1%	N/A
	Personal care products	1%	N/A
<ul style="list-style-type: none"> Think Soy tastes awful 		43%	N/A

Canadian Soy Food Challenge

1. TASTE
2. TRIAL



Thank You!

