



Cans Get You COOKING

Survey of Consumers Perceptions and Consumption of Canned Protein Foods

December 2014



Objectives & method

- Objectives:
 - The Can Manufacturers Institute (CMI) has teamed with FoodMinds in an effort to show that canned proteins are a convenient and important part of consumer's diets.
 - CMI is interested in understanding how consumers use canned meats, poultry, fish and other protein sources, and the reasons consumers seek increased protein from fresh, canned and other forms.
- Methods:
 - In order to collect data that supports CMI objectives, a large-scale multi-region consumer quantitative on-line survey was executed
 - Toluna market research provided access to sample, assist in data collection, analysis and reporting
 - The sample was comprised of 1,076 adults who completed a survey regarding their perceptions and consumption behaviors of protein as a nutrient, and canned meats, poultry and seafood as convenient and great-tasting sources of protein at meal occasions throughout the day
 - Questions addressed general protein consumption, canned protein consumption, convenience of canned proteins and reasons for increased protein intake
 - All study procedure documents and questionnaires will be developed by FoodMinds working in collaboration with CMI and Toluna

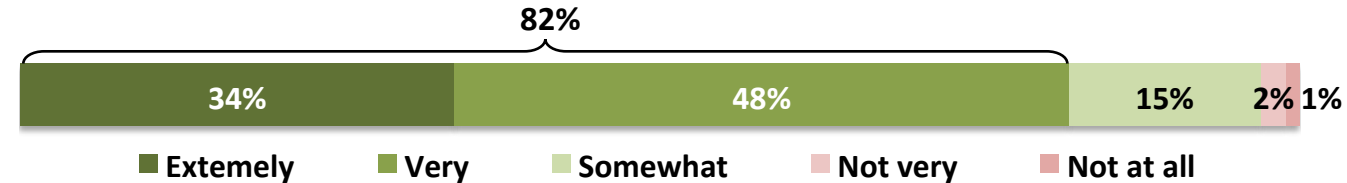


Protein is an important, frequently consumed nutrient

- Eighty-two percent of Americans rate protein as a very or extremely important component of their diet
- Given its perceived importance, it's not surprising to see that 69% of Americans report eating at least three servings of protein daily
 - The most frequent protein-consuming 20% of Americans report eating six or more servings of protein in an average day

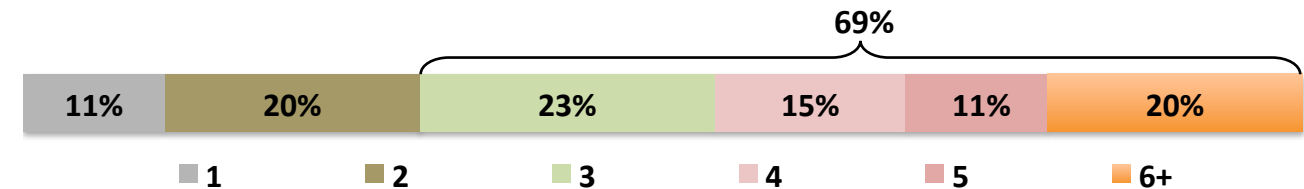
Importance of Protein in the Diet

(Base = 1076 Rep Adults)



Servings of Protein Daily

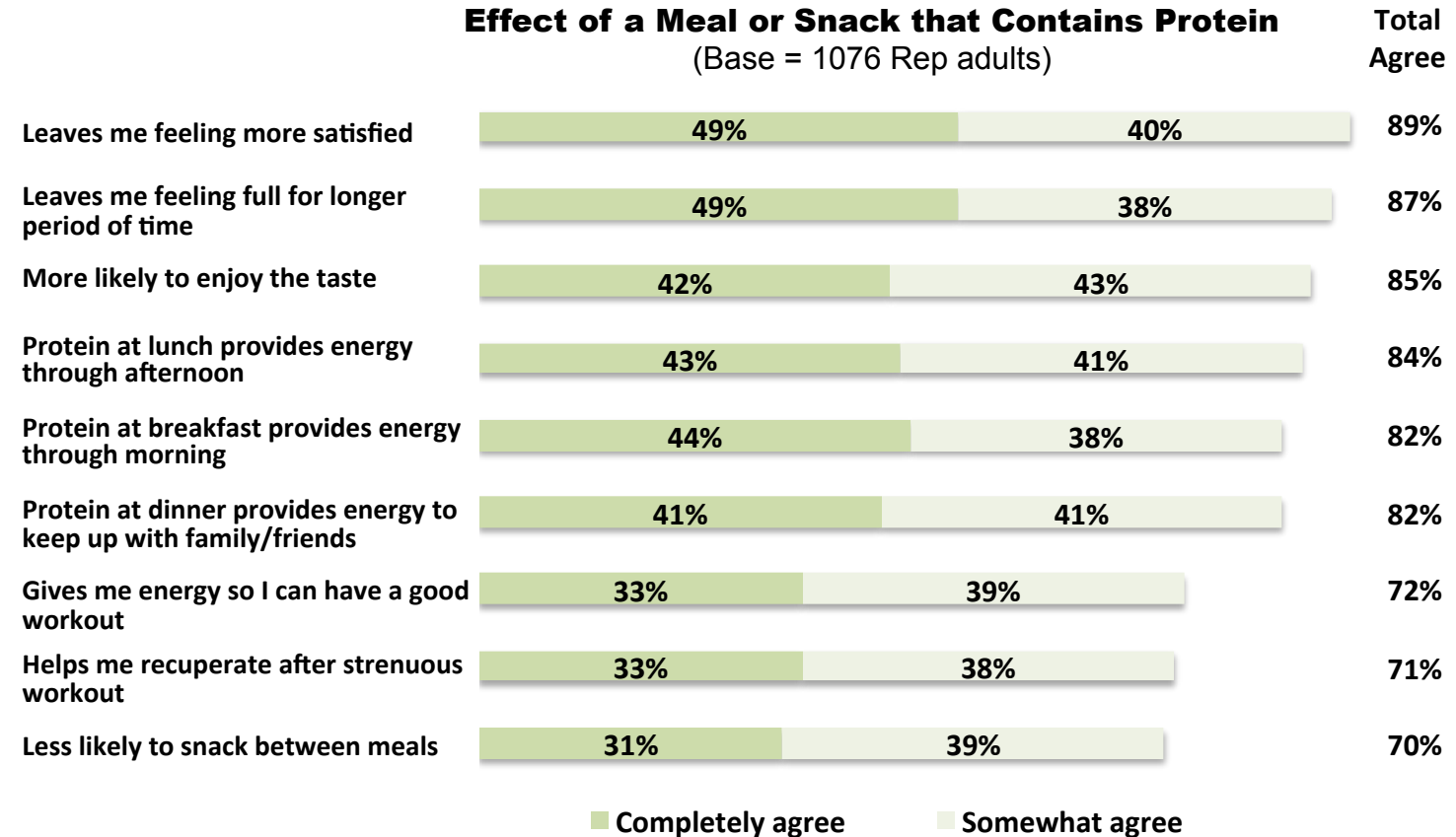
(Base = 1076 Rep Adults)



Q: Using the following scale, please let us know how important do you feel protein is in your diet?
On average, how many servings of protein do you estimate you consume each day?

Incorporating protein throughout the majority of eating occasions is seen by a majority of Americans as delivering a range of important benefits

- Protein is seen by nearly nine in ten American as delivering a long lasting sense of fullness and satisfaction that
 - Eighty-nine percent agree that a meal or snack that contains protein, “leaves me feeling more satisfied”
 - Eighty-seven percent agree protein-containing meals and snacks leave them feeling full for a longer period of time
 - Seventy percent also say that they are less likely to snack between meals when they incorporate a protein food into their meals
- For 85% of adults the presence of protein also contributes significantly to taste enjoyment of a meal or snack
- Protein during a meal is also seen by over eight-in-ten Americans as providing energy needed to get them through the morning (82%), afternoon (84%) and evening (82%)
 - Nearly three-fourths (72%) agree that protein in a meal or snack gives them the energy they need
 - Nearly three-fourth (71%) agree protein meals and snacks help them recuperate after a strenuous workout

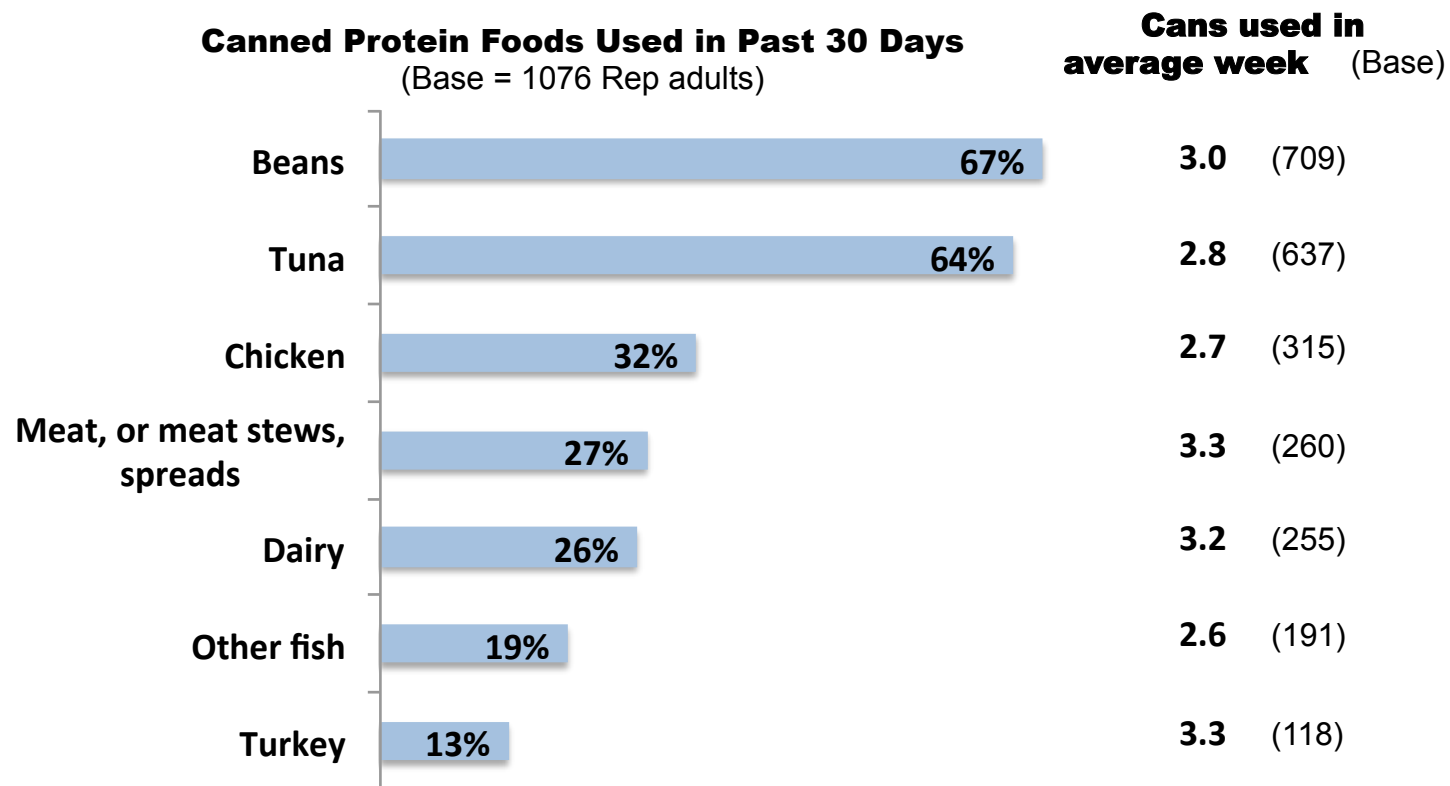
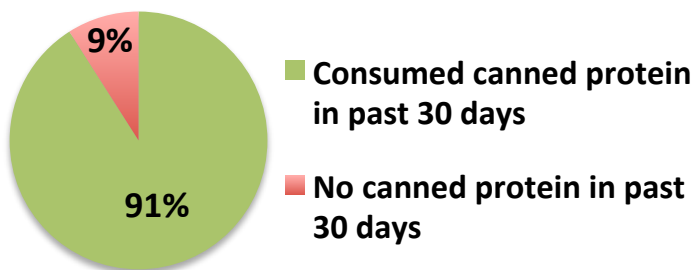


Q: Rate agreement of the following statements that describe the effect of eating a meal/snack with protein (5 pt scale – Completely / Somewhat agree / Neither agree nor disagree / Somewhat / Completely disagree)



Nearly all Americans say they have consumed some type of canned protein in the past 30 days, beans and tuna being the most widely consumed canned protein foods

- About two-thirds of Americans claim to have eaten canned tuna (64%) and beans (67%) in the past 30 days
- Other canned proteins – chicken, meat, dairy, other fish and turkey – are consumed by less than one-third of Americans
- However, for those consumers that do consume these types of canned protein foods, they play an important role with about two to three cans of these protein foods being consumed in an average week

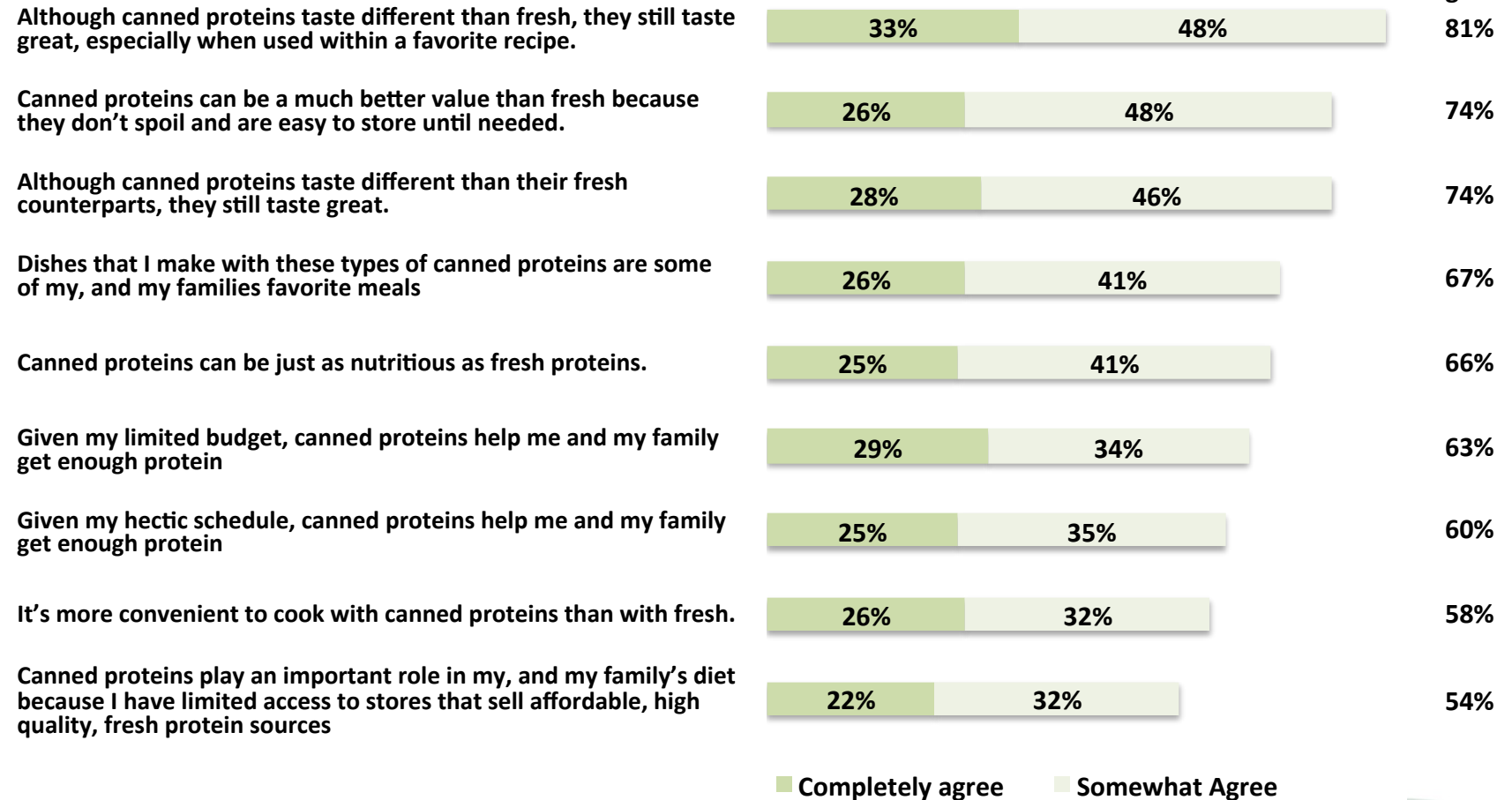


Q: Please indicate which of the following types of canned proteins you and your family have consumed in your home in the past month

Consumers perceive a range of benefits associated with canned proteins, offering opportunity to drive incremental consumption

- There is a recognition that canned proteins taste different than their fresh counterparts, but they still can deliver great taste – particularly when prepared as part of a family-favorite recipe or meal
- The majority of Americans say they have a great tasting (81%) recipe that they use to prepare one of their family’s favorite meals (67%)
- Canned proteins are seen as having distinct advantages over their fresh counterparts in that they can be a better value (74%), are more convenient to prepare (58%), and are more accessible (54%) than fresh
- Canned proteins play an important role as a food-budget-stretcher - a majority of Americans feel that given a limited budget cans help make sure families get enough protein (63%) and canned proteins can be a better value than fresh because they do not spoil (74%)

Perceptions of Meals Prepared with Canned Proteins
(Base = 951 adults who have consumed canned protein in past month)

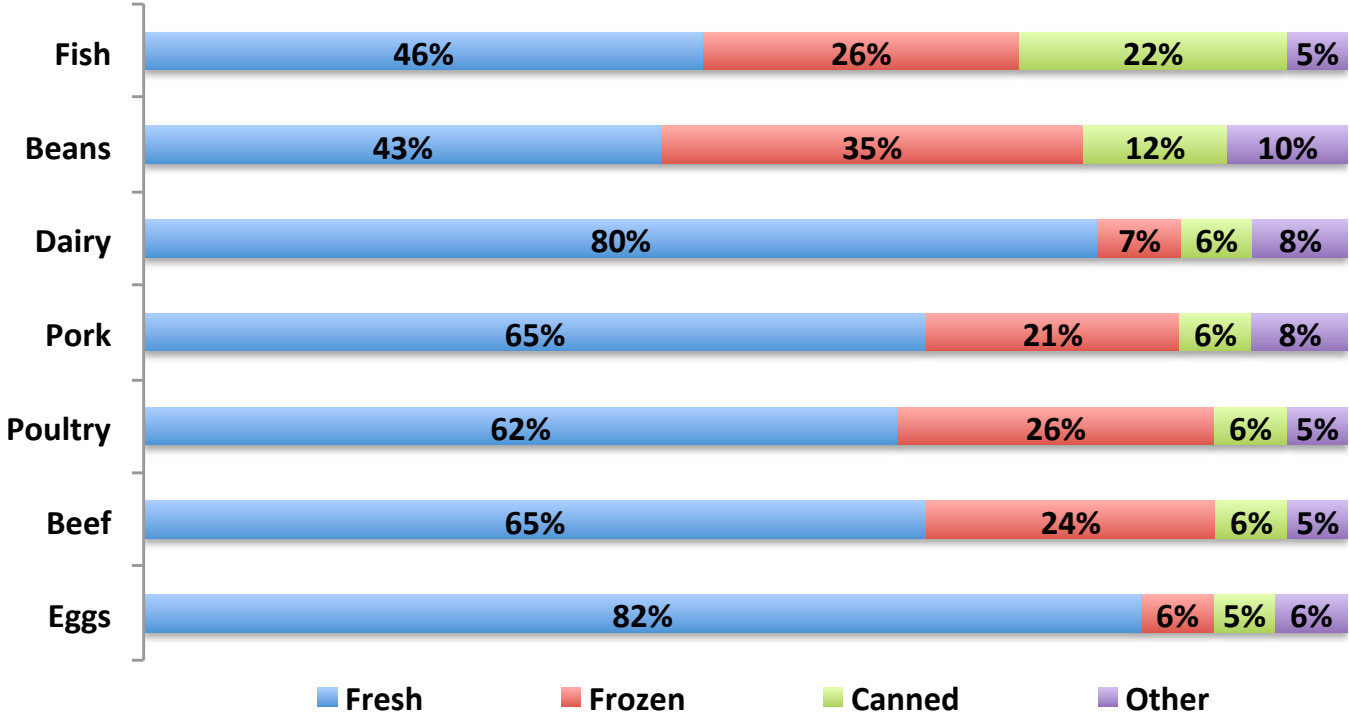


Q: Rate agreement of the following statements about canned sources of protein such as tuna, chicken, meat, and beans (5 pt scale – Completely / Somewhat agree / Neither agree nor disagree / Somewhat / Completely disagree)

Although canned proteins are widely consumed, they account for a small proportion of all protein eaten, relative to fresh

- Cans play the biggest role in contributing two important forms of under-consumed sources of protein – beans and fish
 - Legume and seafood protein sources are identified by Dietary Guidance as healthy sources of protein that Americans should be incorporating into their diets with greater frequency
- About 6% of the volume of most frequently consumed protein foods (dairy, beef and poultry) are sourced from cans
 - The wide penetration of canned proteins, but relatively small share of total protein intake, suggest that canned proteins play the important, secondary supporting role as the convenient and easy-to-prepare meal or center-of-the-plate item

Distribution of Protein Foods by Form
(Base = 1076 rep adults)



Q: On average what percentage of these protein foods are from canned, frozen, fresh or some other form?

Convenient meals and snacks are by far the most important drivers of canned protein consumption

- The four “dishes” that American’s are most likely to consume using canned protein involve zero or minimal preparation:
 - Sandwich
 - Plain, out of the can
 - In a lettuce salad
 - On crackers or nacho chips
- The most popular dishes that involve a recipe or some moderate level of preparation include casseroles and pot pies, soups and also as the “center-of-the-plate,” accompanied with rice or pasta

Intent to Add Canned Proteins to Meals & Dishes in Next Month

(Base = 951 respondents who have consumed any canned protein in past month)

	Fish	Poultry	Meat
Sandwich	52%	38%	20%
Plain, out of the can	31	19	16
In lettuce salad	30	27	14
On crackers, nachos, chips	27	21	23
Casserole or pot pie	25	31	21
With pasta	23	29	17
With rice	22	30	18
Wraps	22	27	13
One-dish skillet meals	19	25	18
In dip	19	21	13
In a soup	17	32	20
Tacos, enchiladas, quesadillas	16	21	17
Don't eat this form of protein in these meals	19	30	39



Q: How frequently do you incorporate the following types of canned proteins into your snacks?

Key Messages

- Protein is an extremely or very important nutrient to a large proportion of Americans and canned foods play a role in helping people achieve their desired level of daily protein intake. More than two-thirds of Americans consume three or more servings of protein in an average day, with one-in-five Americans consuming six or more servings in an average day.
- Protein's importance in the diet is driven by its role in delivering a long lasting sense of fullness, contributing to taste enjoyment, and more than four-in-five Americans feel that protein in a meal or snack provides them with the long lasting energy they need to make it through the morning, afternoon and evening.
- Nearly all Americans report consuming some form of canned protein foods in the past month – tuna, beans, chicken, meat, dairy, other types of fish and turkey.
- Canned foods are widely consumed because they taste great, and for many people are part of a family-favorite recipe. Canned proteins are also seen as having distinct advantages over their fresh counterparts in that they can be a better value, are more convenient to prepare, and are more accessible than fresh.
- Canned proteins play an important role as a food-budget-stretcher – a majority of Americans feel that given a limited budget cans help make sure families get enough protein, and canned proteins can be a better value than fresh because they do not spoil.
- Canned proteins are widely used by nine-in-ten Americans as a super-convenient form of protein, eaten straight from the can, or prepared in simple meals like sandwiches, salads, casseroles and soups.

