


POR 135-09
HCPOR-09-25

Natural Health Product Tracking Survey – 2010 Final Report

Prepared for: Health Canada
Prepared by: Ipsos Reid
01/13/2011

For more information on this report please email: por-rop@hc-sc.gc.ca

Contract number: HT372-090020/001/CY
Contract date: 2010-03-31

TABLE OF CONTENTS

1. Background

The Natural Health Products Directorate (NHPD) is responsible for the regulation of natural health products (NHPs) sold in Canada. Its mission is to assure ready access for Canadian consumers to natural health products that are safe, effective, and of high quality, while respecting freedom of choice and philosophical and cultural diversity.

To support the NHP Regulations and mission, the NHPD has initiated a Stakeholder Focus Plan whose objective is to increase the level of awareness of the NHP Regulations and their impacts on stakeholders, including:

- Industry Stakeholders: business representatives in the NHP sector
- Internal Stakeholders: all federal government and Crown Branches and Directorates who's business may be impacted by the regulation of NHPs in Canada
- International Stakeholders: all international establishment or organization who's business may require the knowledge of the regulation of NHPs in Canada
- Canadian Health Care Practitioners, NGOs, and Provincial/Territorial Regulators whose routines may require knowledge of the Canadian regulatory framework for NHPs
- Consumers: All Canadian patrons

The Stakeholder Focus Plan is an integral part of the NHPD's activities. The Plan serves as an important link to Canadians and serves to facilitate delivery of high quality information on NHPs.

Building on the results of a baseline survey (Baseline NHP Survey Among Consumers, March 2005), Health Canada commissioned this study to gauge current awareness, attitudes knowledge and behaviours among consumers, one of the Plan's target groups.

This research was conducted because:

- It provides important background information related to both the Food Branch's Stakeholder Focus Plan and to the Health Products segments of Health Canada's Food and Consumer Safety Action Plan. Additionally, comparing results with the 2005 benchmark survey results will help provide insight on potential information sharing and communication initiatives to increase awareness of the NHPD and the regulatory framework for NHPs in Canada;
- The data gained from this research will help to develop information sharing/awareness campaigns that are fiscally responsible and effective. The awareness campaigns will in turn increase Canadians' confidence in the regulatory system, and increase informed choice amongst consumers in regards to NHPs;
- It is required to track changes in knowledge, and behaviour since the prior consumer survey in 2005. It has been five years since the last survey, and the market landscape has changed considerably since then, with more and more natural health products licensed on the market. It is important at this time to determine whether there have been any subsequent changes in consumer's perception or attitude towards natural health products;

- The research is prescribed in part by the RMAF, as part of a systematic performance review and will also feed in to indicators for the Food and Consumer Safety Action Plan. Data from this research will serve as tracking against the benchmark and to measure the effectiveness of upcoming consumer-targeted marketing and communications activities;

2. Research Objectives

The results of this study will be used to track the evolution of relevant attitudes and beliefs in the target group since the previous study in 2005, and to evaluate the effectiveness of the Stakeholder Focus Plan. Specific objectives of the survey included:

- Measuring awareness and attitudes of the target audience regarding natural health products, their regulation, their labelling, and their safety;
- Examining Canadians' receptivity to various potential means of delivering information to them, and the types of information they would like to have;
- Determining behavioural patterns, with regards to natural health products use;
- Exploring provincial, territorial, and other segment differences in knowledge, attitudes, and behaviours;
- Providing recommendations on the social marketing implications based on the findings from the respondents; and
- Examining changes in knowledge, attitudes and behaviour since the 2005 study.

3. Methodology

The methodology for this survey involved a telephone survey, using computer assisted telephone interviewing (CATI), among a nationally representative sample of Canadian adults (18 and above). A total of 2,001 interviews were completed from September 28 to October 21, 2010. The average survey length was 16 minutes.

Interview quotas were used to achieve a representative of the population of Canada as a whole based on 2006 Census data, with a target number of interviews conducted in each region to reflect its relative size within the country. Nested quotas were set in a matrix within each region and we sampled to 40 sub-markets within the six regions of Canada.

The table below shows the total number of interviews (unweighted) by region, and the associated margins of sampling error, at the 95% confidence interval. Please note that the margin of error for sub-groups of the population is higher than that of the total sample. The results were weighted to Census 2006 targets for region, gender and age as needed.

REGION	SAMPLE SIZE n=2,001	MARGIN OF ERROR
British Columbia/Yukon	265	± 6.0
Alberta/NWT	204	± 6.9
Saskatchewan/Manitoba/ Nunavut	130	± 8.6
Ontario	766	± 3.5
Quebec	488	± 4.4
Atlantic Provinces	148	± 8.1
Canada	**2,001**	**± 2.2**

The response rate for the survey was 9% (please see Appendix I for the response rate calculation). On the first night of interviewing we pre-tested the surveys by conducting 20 interviews (10 in French and 10 in English).

The RDD telephone methodology and proportional distribution of sample according to region is consistent with the approach in 2005, and comparisons to the 2005 study results are included throughout this report.

4. Executive Summary

Awareness of and Familiarity with Natural Health Products

In a question to gauge awareness of natural health products, respondents were presented with a list of items and were asked whether or not they thought each was a natural health product. The list was comprised of products that are natural health products, those that are not, and those that can be considered natural health products depending on the ingredients and the health claims made. The findings indicate that, in many instances, Canadians are unclear about what a natural health product is.

Specific knowledge of products that qualify as natural health products in Canada is high in some respects, although there is also evidence of some confusion. Notably, high proportions of respondents accurately categorize vitamins or minerals (72%) and homeopathic medicines (60%) as natural health products, yet Canadians are less clear with respect to traditional medicines (43% say they are not NHPs). In terms of products that are not natural health products, there is significant confusion specifically regarding organic food/biologics, as seven in ten respondents (69%) think they are natural health products.

Familiarity with natural health products has increased significantly (39%, up from 36%) compared to 2005.

Experience With Natural Health Products

While the incidence of using natural health products has held steady compared to 2005 (73% vs. 71%), frequency of usage has shifted such that fewer respondents are using them on a daily basis (32%, down from 38%) and more respondents are only using them during certain seasons (41%, up from 37%).

Vitamins and minerals (53%, down from 57%) continue to be the natural health products used most often by Canadians, although usage has declined compared to 2005. Some interesting shifts have taken place in terms of the natural health products used compared to 2005. Most notably, mentions of omega 3/essential fatty acids (18%, up from 3%) and herbal teas (11%, up from 0), have increased significantly, while usage of Echinacea has dropped off considerably (7%, down from 15%). The exception to this is residents of Quebecers who maintain a relatively high usage of Echinacea.

Reasons for Using Natural Health Products

When asked to agree or disagree with a number of statements related to the reasons for using natural health products, the leading responses relate to health maintenance (85% agree), illness prevention and strengthening one's immune system (79%), and a general concern about one's health (76%). A large proportion of Canadians indicate (71%) that natural health products are better for them than chemical products or drugs.

Efficacy of Natural Health Products

In terms of the efficacy of natural health products, Canadians still have a considerable amount of skepticism regarding the health claims made by the manufacturers of natural health products (with 49%, up from 46% agreeing that they are unproven), however this is not to say that Canadians are as doubtful regarding the efficacy of natural health products themselves. Only six percent of respondents 'completely agree' that they do not believe in the efficacy of natural health products.

Side Effects of Natural Health Products

The incidence of natural health product users experiencing side effects or unwanted reactions has increased significantly compared to 2005 (15%, up from 12%). To add context to this finding, we found that one in ten (8%) respondents describe the side effects they experienced as 'very serious' and about four in ten (43% vs. 41% in 2005) reported them to someone. Similar to the 2005 study, the leading destination for reporting unwanted side effects is one's medical doctor (49%).

Benefits and Barriers to Using Natural Health Products

The strongest benefits associated with using natural health products continue to be that natural health products can be used to maintain and promote health and that they can be used to treat illness. However, these positive perceptions of natural health products have declined significantly compared to 2005.

Not surprisingly, the barriers to using natural health products register more strongly among current non-users. Those who have not used natural health products in the past are more likely to say they are too expensive, that they were advised against using them, and that they don't know enough about them. Of the barriers mentioned, lack of knowledge is the most significant.

Safety of, Trust in, and Quality of Natural Health Products

Public sentiment that natural health products are safe because they are made from natural substances has declined compared to the previous study, with fewer (42%, down from 52% in 2005) who agree with this statement. Moreover, only one in five agree that if a natural health product is made of natural substances, there is no risk associated with its use.

There is a significant proportion of Canadians who seriously question the safety and quality of natural health products as indicated by their responses to a number of related questions; four in ten (39%) indicate that they are concerned about the safety of natural health products, about a third (34%) agree with the statement 'I think natural health products can be harmful to use', four in ten (42%) indicate that they question the quality of natural health products, and just under a third (32%) indicate that they do not trust the information on the labels of natural health products. Nor does it seem that Canadians in general are complacent, as seven in ten respondents (72%, which is consistent with the previous wave at 71%) agree with the statement that it is important to talk to a medical doctor before using a natural health product.

Regulation of Natural Health Products

In terms of natural health product regulation, two in three Canadians (65%) indicate that it is permitted for the natural health product industry to put health claims on the labels as long as they are backed by scientific evidence. A high proportion of respondents (76%) also agree that all natural health manufacturers must ensure that the products they sell to consumers are safe, however the proportion who hold this opinion has declined significantly compared to 2005 (91%). A plurality (45%) *disagrees* that if a natural health product is for sale to the public they can be confident that it has been approved by Health Canada.

Canadians are uncertain who regulates natural health products. Health Canada is named most often as the regulator of natural health products in Canada (27%, a significant increase compared to 2005, 17%). Nearly two in five (17%) say it is the federal government (a decrease from 27% in 2005). Thus the overall proportion that lays this responsibility at the door of the Government of Canada has remained consistent.

Readership of Natural Health Product Labels

While high proportions of respondents read the labels on natural health products (69% agree vs. 67% in 2005), relatively few agree that they look for a Natural Health Product license Number (NPN) (21% vs. 21% in 2005) or a Drug Identification Number (DIN-HM) on the product (21% vs. 22% in 2005).

Interest in Information on Natural Health Products

When respondents were asked to indicate their level of interest in several aspects of information on natural health products they indicated high levels of interest in every type of information presented to them. Overall, information about safety and recalls of natural health products garnered the highest interest, with over half (55% vs. 53% in 2005) saying they are 'very interested' in this type of information.

Preferred Means of Receiving Information on Natural Health Products

Respondents were presented with a series of ways in which it may be possible to receive information on natural health products, ranging from traditional health care channels (including various types of health care providers) to various media channels, and were asked to indicate how much each means was preferred.

By far, the most preferred way of receiving this type of information is from one's doctor (55% indicating a 'most preferred' score). This is followed by four in ten who most prefer a pharmacy or pharmacist (41%, up significantly from 27% in 2005), and a little over one third who most prefer the Health Canada web site (36%, up significantly from 26% in 2005), and publications by Health Canada (35%, up significantly from 24%). Occupying a second tier are various health care professionals with about one third (in each instance) who most prefer a registered dietician (32%), a nurse (31%), or a naturopath (27%) for receiving this type of information.

5. Rapport sommaire

Connaissance et familiarité avec les produits de santé naturels

Dans une question visant à mesurer la connaissance des produits de santé naturels (PSN), une liste d'articles a été proposée aux répondants et on leur a demandé si chacun était, à leur avis, un produit de santé naturel. La liste contenait des produits de santé naturels, des produits qui n'en sont pas et des produits qui peuvent être considérés naturels en vertu des ingrédients qui les composent et des effets qu'ils prétendent avoir sur la santé. Les résultats indiquent que, dans bien des cas, les Canadiens ne savent pas trop ce qu'est un produit de santé naturel.

La connaissance précise de produits qualifiés de produits de santé naturels au Canada est élevée à certains égards, mais on note aussi une certaine confusion. Notamment, des proportions élevées de répondants classent correctement les vitamines ou les minéraux (72 %) et les préparations homéopathiques (60 %) dans la catégorie des produits de santé naturels, néanmoins les Canadiens sont moins certains dans le cas des médicaments traditionnels (43 % disent que ce ne sont pas des PSN). Pour ce qui est des produits qui ne sont pas des produits de santé naturels, il existe une grande confusion particulièrement en ce qui concerne les aliments/produits biologiques puisque sept répondants sur dix (69 %) estiment que ce sont des produits de santé naturels.

La connaissance des produits de santé naturels a considérablement augmenté (39 %, en hausse par rapport à 36 %) depuis 2005.

Expérience avec les produits de santé naturels

Bien que l'incidence de l'utilisation des produits de santé naturels soit demeurée stable depuis 2005 (73 % contre 71 %), on observe un changement dans la fréquence d'utilisation. En effet, les répondants sont maintenant moins nombreux à en utiliser quotidiennement (32 %, en baisse par rapport à 38 %), mais plus nombreux à en utiliser uniquement durant certaines saisons (41 %, en hausse par rapport à 37 %).

Les vitamines et les minéraux (53 %, en baisse par rapport à 57 %) sont toujours les produits de santé naturels que les Canadiens utilisent le plus souvent, même si l'usage a diminué par rapport à 2005. On observe d'intéressants changements en ce qui a trait aux produits de santé naturels utilisés par rapport à 2005. Parmi les plus notables, mentionnons l'utilisation des oméga-3/acides gras essentiels (18 %, en hausse par rapport à 3 %) et des tisanes (11 %, en hausse par rapport à 0) qui a considérablement augmenté, alors que l'utilisation de l'échinacée a grandement décliné (7 %, en baisse par rapport à 15 %). On note une exception : l'utilisation de l'échinacée continue d'être relativement élevée chez les résidants du Québec.

Raisons d'utilisation des produits de santé naturels

Lorsqu'on demande aux répondants s'ils sont d'accord ou en désaccord avec un certain nombre d'énoncés concernant les raisons d'utiliser des produits de santé naturels, les réponses les plus fréquentes se rapportent au maintien de la santé (85 % sont d'accord), à la prévention de la maladie et au renforcement du système immunitaire (79 %) et à une préoccupation globale de la santé (76 %). Une grande proportion de Canadiens (71 %) indiquent que les produits de santé naturels sont meilleurs pour eux que les produits chimiques ou les médicaments.

Efficacité des produits de santé naturels

En ce qui concerne l'efficacité des produits de santé naturels, les Canadiens manifestent toujours un grand scepticisme à l'égard des allégations sur la santé faites par les fabricants de produits de santé naturels (49 %, en hausse par rapport à 46 %, sont d'accord pour dire qu'elles sont sans fondement), cependant cela ne veut pas dire que les Canadiens doutent pour autant de l'efficacité des produits de santé naturels eux-mêmes. Seulement six pour cent des répondants sont « tout à fait d'accord » pour dire qu'ils ne croient pas en l'efficacité des produits de santé naturels.

Effets secondaires des produits de santé naturels

L'incidence des effets secondaires ou des réactions indésirables signalés par les utilisateurs de produits de santé naturels a considérablement augmenté depuis 2005 (15 %, en hausse par rapport à 12 %). En effet, un répondant sur dix (8 %) qualifie de « très graves » les effets secondaires éprouvés, et environ quatre sur dix (43 % contre 41 % en 2005) les ont signalés à quelqu'un. De la même façon qu'en 2005, c'est le plus souvent à leur médecin que les répondants signalent les effets secondaires (49 %).

Avantages des produits de santé naturels et obstacles à leur utilisation

Les avantages les plus importants associés à l'utilisation des produits de santé naturels continuent d'être le fait que ces produits peuvent être utilisés pour conserver et promouvoir la santé ainsi que pour traiter des maladies. Toutefois, ces perceptions positives à l'égard des produits de santé naturels ont grandement décliné comparativement à 2005.

Comme on pouvait s'y attendre, les obstacles à l'utilisation des produits de santé naturels proviennent beaucoup plus des non-utilisateurs. Les personnes qui n'ont pas utilisé de produits de santé naturels dans le passé ont plus tendance que les autres à dire qu'ils coûtent trop cher, qu'il leur a été déconseillé d'en utiliser et qu'ils n'en connaissent pas assez sur ces produits. Parmi les obstacles mentionnés, c'est le manque de connaissance qui est le plus important.

Innocuité et qualité des produits de santé naturels et confiance dans ces produits

La croyance populaire voulant que les produits de santé naturels soient sans danger parce qu'ils sont composés d'ingrédients naturels est moins forte que lors de l'étude précédente. Les répondants sont maintenant moins nombreux (42 %, en baisse par rapport à 52 % en 2005) à être d'accord avec cet énoncé. Par ailleurs, seulement un répondant sur cinq est d'accord pour dire que si un produit de santé naturel est fait de substances naturelles, son utilisation ne comporte aucun risque.

Une importante proportion de Canadiens remettent sérieusement en question l'innocuité et la qualité des produits de santé naturels, comme l'indiquent leurs réponses à un certain nombre de questions à ce sujet. Quatre sur dix (39 %) se disent préoccupés par l'innocuité des produits de santé naturels, environ un tiers (34 %) sont d'accord avec l'énoncé « Je crois qu'il peut être dangereux d'utiliser des produits de santé naturels », quatre sur dix (42 %) indiquent qu'ils doutent de la qualité des produits de santé naturels et un peu moins du tiers (32 %) indiquent qu'ils ne font pas confiance aux renseignements qui figurent sur les étiquettes des produits de santé naturels. Il semble que les Canadiens en général ne s'y méprennent pas puisque sept sur dix (72 %, ce qui est cohérent avec la proportion de 71 % lors de la vague précédente) sont d'accord pour dire qu'il est important de parler à un médecin avant d'utiliser un produit de santé naturel.

Réglementation des produits de santé naturels

Pour ce qui est de la réglementation des produits de santé naturels, deux Canadiens sur trois (65 %) indiquent que l'industrie des produits de santé naturels peut inscrire sur les étiquettes des produits des allégations sur la santé dans la mesure où ces allégations sont fondées scientifiquement. Une forte proportion de répondants (76 %) sont aussi d'accord pour dire que tous les fabricants de produits de santé naturels doivent s'assurer que les produits qu'ils vendent aux consommateurs sont sans danger. Cependant, la proportion de répondants qui expriment cet avis a considérablement diminué depuis 2005 (91 %). Un grand nombre de répondants (45 %) *sont en désaccord* pour dire que si un produit de santé naturel est à vendre au public, on peut estimer qu'il a été approuvé par Santé Canada.

Les Canadiens sont incertains lorsqu'il s'agit de désigner qui réglemente les produits de santé naturels. C'est Santé Canada qui est le plus souvent nommé comme organisme de réglementation des produits de santé naturels au Canada (27 %, une augmentation importante par rapport à 17 % en 2005). Près de deux répondants sur cinq (17 %) disent que c'est le gouvernement fédéral (une diminution par rapport à 27 % en 2005). Ainsi, la proportion totale de répondants qui attribuent cette responsabilité au gouvernement du Canada est demeurée inchangée.

Lecture des étiquettes de produits de santé naturels

Si des proportions élevées de répondants lisent les étiquettes des produits de santé naturels (69 % sont d'accord pour le dire, contre 67 % en 2005), ils sont relativement peu nombreux à regarder si le produit porte un numéro de produit naturel (NPN) (21 % contre 21 % en 2005) ou un numéro d'identification de drogue (DIN-HM) (21 % contre 22 % en 2005).

Intérêt pour des renseignements sur les produits de santé naturels

Lorsque les répondants sont appelés à indiquer leur niveau d'intérêt à l'égard de plusieurs aspects des renseignements sur les produits de santé naturels, ils se disent très intéressés par tous les types de renseignements qui leur sont présentés. Dans l'ensemble, ce sont les renseignements sur l'innocuité et les rappels de produits qui suscitent le plus grand intérêt puisque plus de la moitié des répondants (55 % contre 53 % en 2005) se disent « très intéressés » par ce type de renseignements.

Moyens préférés de se renseigner sur les produits de santé naturels

Une série de moyens par lesquels il est possible de recevoir des renseignements sur les produits de santé naturels a été présentée aux répondants , allant des voies de communication traditionnelles en matière de soins de santé (y compris les divers types de fournisseurs de soins) aux divers voies médiatiques, puis on leur a demandé d'indiquer jusqu'à quel point chacun leur plaisait.

C'est de loin auprès de leur médecin que les répondants préfèrent recevoir de l'information (55 % indiquant que c'est le moyen qui leur « plaît le plus »). Viennent ensuite la pharmacie ou le pharmacien qui plaît le plus à quatre répondants sur dix (41 %, en hausse significative par rapport à 27 % en 2005), et pour un peu plus du tiers, le site Web de Santé Canada(36 %, en hausse significative par rapport à 26 % en 2005) et les publications de Santé Canada (35 %, en hausse significative par rapport à 24 %). Dans une proportion moindre, divers professionnels de la santé, dont les diététistes professionnels (32 %), les infirmières (31 %) et les naturopathes (27 %), plaisent le plus à environ le tiers des répondants respectivement.

6. Conclusions and Recommendations

- Three in four Canadians use natural health products and a third use them every day; but there is evidence of a great deal of confusion as to what a natural health product actually is, with many operating under the assumption that certain types of products (e.g. organic products) qualify as natural health products when they do not.
- Moreover, the findings show a Canadian public that is divided about whether or not products for sale have been approved by Health Canada, and about the quality and safety of natural health products.
- Nearly seven in ten (69%) Canadians indicate that they read the labels on natural health products, but do they know what to look for? Only two in ten (21%) look for either a Natural Health Product License Number (NPN) or Drug Identification Number for Homeopathic Remedies (DIN-HM) on the product.
- While they are divided on issues surrounding natural health products, Canadians are in agreement that they need more information on natural health products:
  - Seven in ten (71%) say they need more information.
  - Only three in ten say consumers have enough information to make informed decisions about the natural health products that they buy – indeed disagreement with this statement has grown.
  - Lack of information is a significant reason why non-users have not used natural health products before (with six in ten non-users indicating that they do not know enough about natural health products to use them).
  - One in four agrees that Health Canada does a good job of informing Canadians about natural health products – this is another area where disagreement with the statement is on an upward trend since 2005.
- Canadians *want* more information. There were high levels of interest in every type of information presented to them, from safety, to regulation, to side effects and benefits.
  - Information on recalls, safety advisories, and the side effects of natural health products are of greatest interest.
- Making information available to the general public through traditional health care practitioners, such as (primarily) medical doctors, pharmacies/pharmacists, registered dietitians, and nurses, would be very effective as Canadians offer them high ratings as providers of this type of information.
- However, Health Canada is also well positioned to provide Canadians with more information about natural health products directly; Health Canada's website and publications are among the preferred means of receiving information – second only to doctors and pharmacies/pharmacists.

7. Detailed Findings

7.1 Awareness and Familiarity with Natural Health Products

7.1.1 Awareness of Natural Health Products

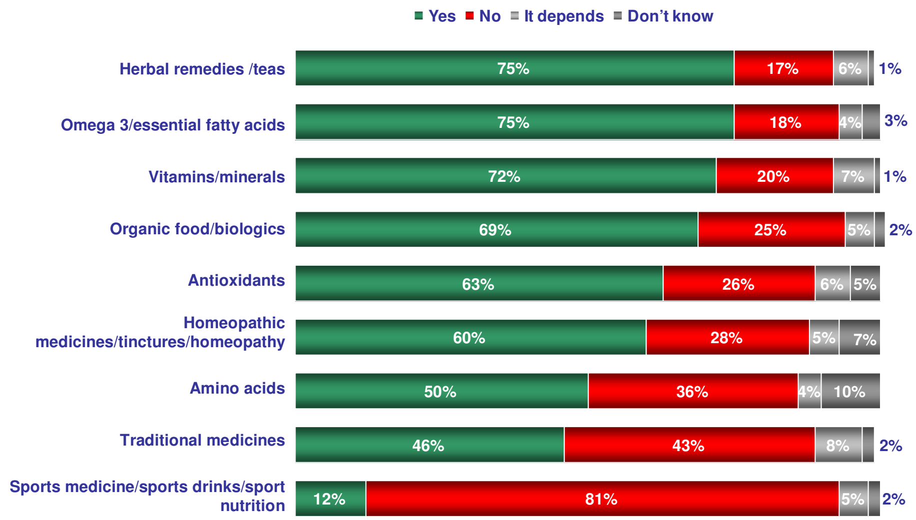
In this question respondents were presented with a list of items and were asked whether or not they thought each was a natural health product. The list was comprised of products that are natural health products, those that are not, and those that can be considered natural health products depending on the ingredients and the health claims made. The findings indicate that, in many instances, Canadians are unclear about what is a natural health product.

In terms of the products included on the list that *are* natural health products: vitamins/minerals, homeopathic medicines/tinctures/homeopathy, and traditional medicines, respondents are most knowledgeable with respect to vitamins/minerals (with 72% saying yes), followed by six in ten (60%) who correctly identify homeopathic medicines as natural health products. In terms of traditional medicines, Canadians are divided. Close to half (46%) say that they are natural health products, while nearly the same proportion (43%) of respondents say they are not.

In terms of the items that *may* be natural health products depending on the ingredients and health claims made, Canadians are most likely to categorize herbal remedies/teas and omega 3/essential fatty acids as natural health products (both at 75%). More than half (63%) say that antioxidants are natural health products, and exactly half (50%) say that amino acids are. The majority of Canadians think that sports medicines, drinks, or nutrition are not natural health products (81%), with 12 percent who do.

Interestingly, organic food/biologics, the only item asked about that is definitively *not* a natural health product, was said to be a natural health product by seven in ten (69%) respondents.

Awareness of Natural Health Products



1X. First off, please tell me which of the following you think are natural health products? Base: All respondents n=2,001

Demographic Differences

Awareness that vitamins/minerals are natural health products is highest among younger Canadians (peaking at 80% among those 18 to 34 years old), while residents of British Columbia (69%), those with higher levels of education (peaking at 62% among those with a university education or higher), and income (peaking at 66% among those with household incomes of $60,000 or more), those 35 to 54 (66%), and women (67% compared to 53% among men) are most likely to know that homeopathic medicines are natural health products. Those with lower household incomes (peaking at 58% among those earning less than $30,000 a year), residents of Atlantic Canada (56%), and men (51% compared to 42% among women) are most likely to correctly categorize traditional medicines as natural health products.

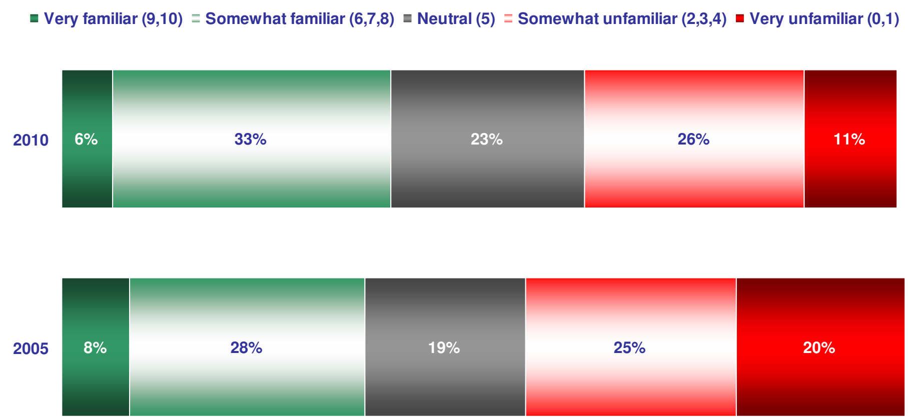
Residents of Quebec (72%) and those with a high school education (72% compared to 63% among those with less than a high school education) are most likely to erroneously say that organic food/biologics are natural health products.

Those who have used natural health products in the past are significantly more likely than those who have not to say that each item is a natural health product, with the exception of organic food/biologics, sports medicine/drinks/nutrition, and traditional medicines, in which case there are no statistically significant differences across these audiences. Interestingly, there seems to be quite a misperception regarding organic foods/biologics, as those who use natural health products on a frequent basis (75% among those who use them on a daily or weekly basis) are significantly more likely than those who use them less often (66% among those who use them monthly or only during certain seasons) to say they are natural health products.

7.1.2 Familiarity with Natural Health Products

Respondents are more likely to be familiar with natural health products compared to the 2005 study. Four in ten (39%, up from 36% in 2005) say they are either very (6% indicating 9 or 10 on a 0 to 10 scale) or somewhat (33% indicating 6, 7, or 8) familiar with natural health products. A similar proportion (37%, down from 45% in 2005) are unfamiliar with natural health products (rating of 4 or lower), while 23 percent (vs. 19% in 2005) express their familiarity as a five on the scale

Familiarity With Natural Health Products



3. On a scale of 0 to 10, where 0 means not at all familiar and 10 means very familiar, please tell me how familiar are you with natural health products?
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

Women (8%) are more likely than men (5%) to be 'very familiar' with natural health products, as are those with lower levels of income (9% among those with household incomes of $30,000 or less each year, compared to 5% among those earning $30,000 to $60,000). In terms of the proportion of respondents who are 'very familiar' there are no significant differences across the various regions. This differs compared to the previous wave when those in Atlantic Canada were significantly less likely to be 'very familiar', indicating that residents of Atlantic Canada have "caught up" with the rest of the country in terms of their familiarity with these products.

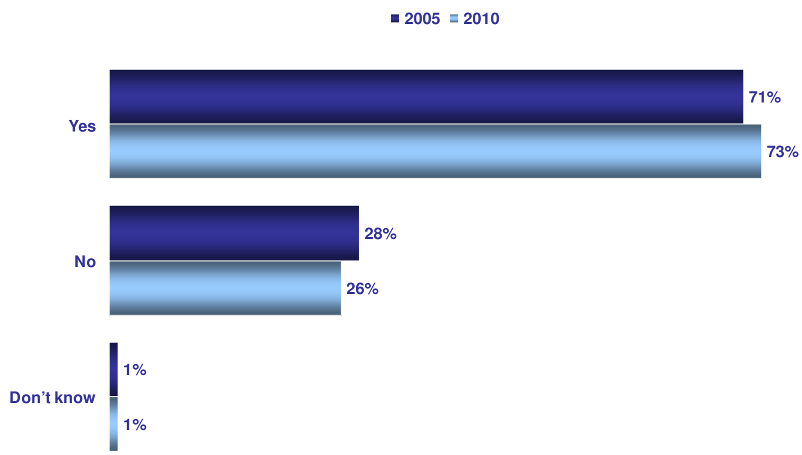
Not surprisingly, those who have used natural health products in the past (50%) are far more likely than those who have not (13%) to describe themselves as familiar (rating of 6 or higher).

7.2 Experience with Natural Health Products

7.2.1 Ever Used a Natural Health Product

The incidence of having ever used a natural health product has changed very little compared to the 2005 study. Nearly three in four (73%) have used a natural health product in the past, which has increased two percentage points since 2005 (71%).

Ever Used a Natural Health Product



4. Have you ever used a natural health product?
2010 Base: All respondents n=2,001 ; 2005 Base: All respondents n=2,004

Demographic Differences

The incidence of having ever used a natural health product is higher among the following sub-groups of the population:

- Residents of Alberta (82%) and British Columbia (81%) compared to those in Ontario (75%), Quebec (66%), and Atlantic Canada (58%);
- Those with higher levels of education (peaking at 81% among those with a university education or higher);
- Those with higher levels of income (peaking at 77% among those with annual household incomes of $60,000 or more);
- Women (78% compared to 68% among men); and
- Those 35 to 54 (77%) compared to those 55 or older (69%).

It is interesting to note that in 2005, residents of British Columbia were leading the way in terms of the region with the greatest usage of natural health products (at 79%), while Albertans now occupy this position (82%, up from 74% in 2005). Moreover, usage among the 35 to 54 age cohort has increased significantly (77%, up from 71% in 2005) and is now the age group most likely to have used natural health products; in 2005 it was highest among those 18 to 34 (76%).

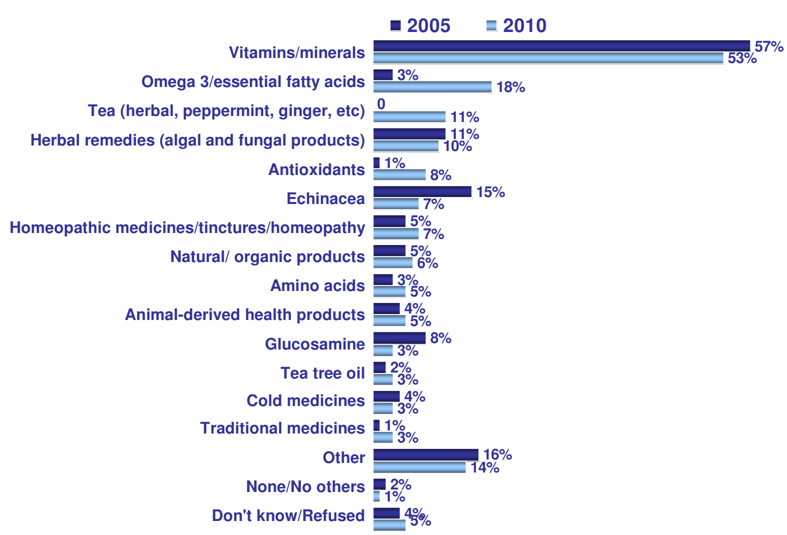
7.2.2 Natural Health Products Used

Vitamins or minerals continue to be the most widely used natural health products by a significant margin; just over half (53%) of those who have used a natural health product in the past say that they have used vitamins or minerals, although this marks a significant decrease compared to 2005 (57%).

Following this are mentions of Omega 3 or essential fatty acids (18%), which has increased significantly compared to 2005 (3%). Various kinds of teas (11% - not mentioned in 2005) and herbal remedies (10% vs. 11%) are both mentioned by about one in ten respondents.

Antioxidants are mentioned by eight percent of respondents (up from 1% in 2005), followed by Echinacea (7%, down significantly from 15%), and homeopathic medicines (7% vs. 5%). All other products are mentioned by less than seven percent of respondents and have not changed significantly compared to the baseline study. The exception to this is glucosamine, which now sits at three percent (3%), down from eight percent.

Natural Health Products Used



Note: Responses less than 3% not shown.

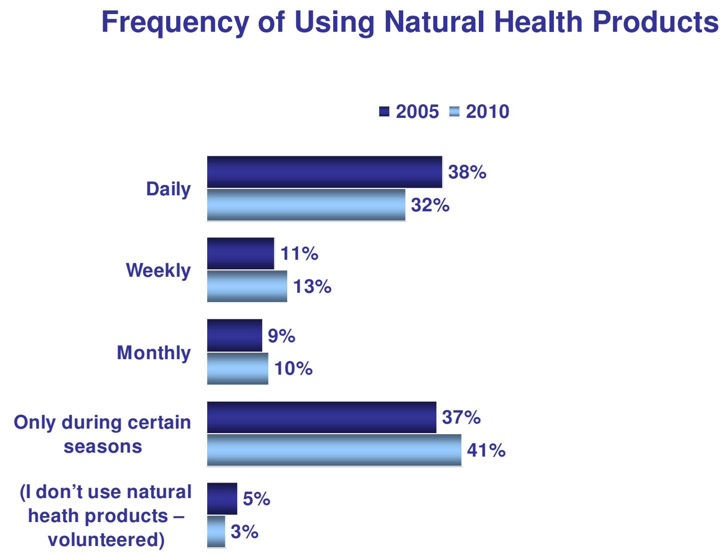
6. Which natural health products have you used? Anything else?
2010 Base: Users of natural health product n=1,416; 2005 Base: Have used a natural health product n=1,365

Demographic Differences

Usage of vitamins and minerals tend to be consistently high across most sub-groups of the population; that said, similar to the 2005 study, usage is significantly higher among more highly educated respondents (peaking at 58% among those with a university degree or higher). Also, those in Alberta are most likely to use vitamins and minerals (61%) compared to those in other regions, yet this difference is less pronounced in this wave (compared to 2005 when usage registered at 71%). Quebecers are still most likely to have the lowest usage of vitamins and minerals. Residents of Quebec also differ from the rest of the country in that they are still using Echinacea at about the same incidence as in 2005 (13% vs. 16% in 2005), while usage in the rest of the country has dropped off. Another difference regarding Quebecers is that they were far more likely than those in other regions to use glucosamine in the previous wave (19%), while their usage in this wave, albeit the highest amongst all regions, has dropped off significantly (6%).

7.2.3 Frequency of Using Natural Health Products

Of those who have used natural health products in the past, most respondents are split between using them either daily or only during certain seasons. About one third (32%) say they use them daily, which represents a significant decrease compared to 2005 (38%), and four in ten only use them during certain seasons (41%, up significantly from 37%). About one in ten respondents use them on a weekly (13% vs. 11% in 2005) or monthly (10% vs. 9%) basis.



5. Which of the following best describes you? I use natural health products…
2010 Base: Have used natural health product n=1,470; 2005 Base: Have used a natural health product n=1,447

Demographic Differences

Those most likely to use natural health products on a daily basis include:

- Older respondents (peaking at 41% among those 55 or older); and
- Women (35% vs. 28% among men).

Residents of Quebec differ in their usage as they are far more likely than those in other regions to use natural health products only during certain seasons (60%) and less likely to use them daily (19%). This trend is consistent with the 2005 study. In 2005, residents of Atlantic Canada were also more likely than those in other regions to use natural health products only during certain seasons, whereas now their usage is largely in line with the rest of English Canada.

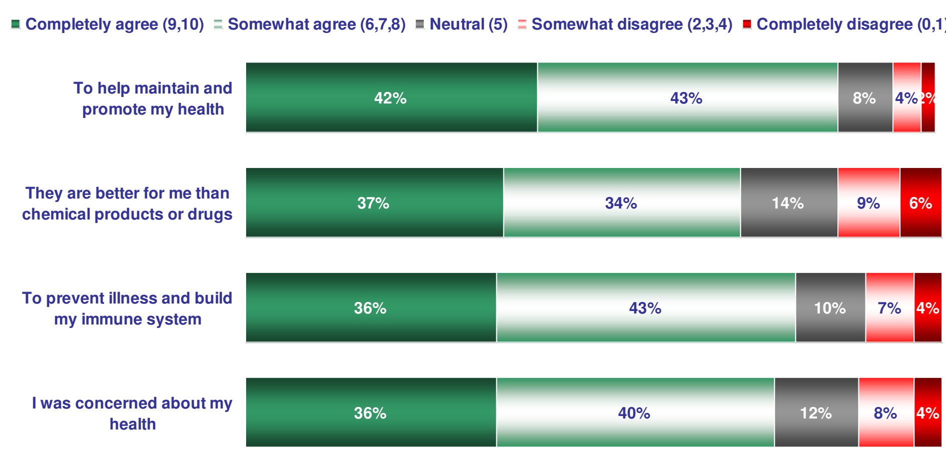
Younger respondents (peaking at 49% among those 18 to 34) are also more likely to use natural health products only during certain seasons (49%).

7.2.4 Reasons for Using Natural Health Products

Respondents who have used natural health products in the past were asked how much they agree or disagree with a series of statements about why they decided to use them.

The findings indicate that the leading reasons for using natural health products relate to general health improvement. In particular, close to nine in ten respondents agree (85%) that they decided to use natural health products because they want to help maintain and promote their health (with 42% who 'completely agree' 9 or 10 on a 0 to 10 scale). Eight in ten agree (79%) that it was to prevent illness and build their immune system (36% 'completely agree'), and three in four (76%) agree that it was because they were concerned about their health (36% 'completely agree'). High proportions (71%) agree that they decided to use natural health products because they are better for them than chemical products or drugs (37% 'completely agree').

Reasons for Using Natural Health Products – First Tier

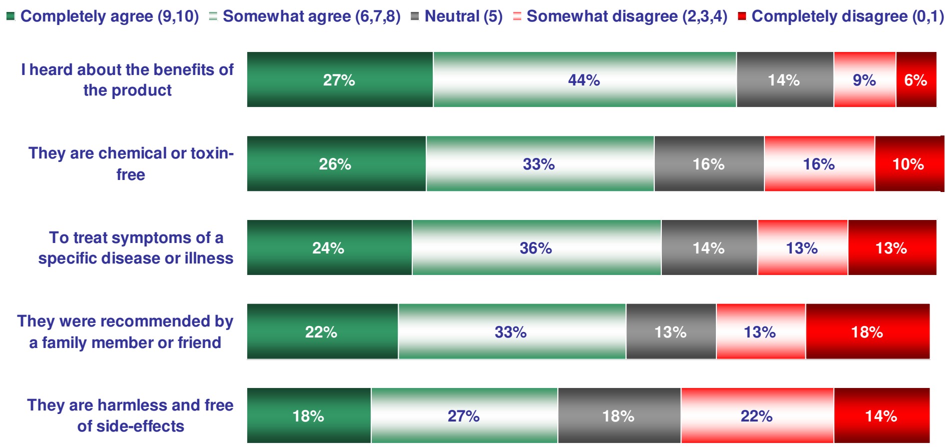


7A. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements about why you decided to use natural health products?
Base: Users of natural health product n=1,416

A second tier of statements comprise an array of benefits. Seven in ten (69%) respondents agree that they started using natural health products because they heard about the benefits of a product (27% 'completely agree'). Moreover, about six in ten respondents (59%) agree that they started using natural health products because they are chemical or toxin free; six in ten (60%) to treat symptoms of a specific disease or illness (24% 'completely agree'), and just over half (55%) because they were recommended by a friend or family member.

A belief that they are harmless and free of side effects was a motivator for about half of respondents (45% who agree with this statement including 18% who 'completely agree').

Reasons for Using Natural Health Products – Second Tier



7A. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements about why you decided to use natural health products?
Base: Users of natural health product n=1,416

Demographic Differences

In general, there are four demographic sub-groups that tend to have significantly higher top level agreement scores (9 or 10 on the scale) for each of the reasons for using natural health products: those with lower levels of income, those with lower levels of education, women, and residents of Atlantic Canada.

Those with lower levels of income (with scores peaking among those with household incomes of less than $30,000) are significantly more likely than those with higher incomes to 'completely agree' with each of the reasons for using natural health products, with the exception of the following: because they heard about the benefits of the product and because they were recommended by a friend or family member, where there are no significant differences across key demographic statements. The same overall trend applies to those with lower levels of education.

Women are significantly more likely than men to 'completely agree' with the following statements about various reasons for using natural health products: general concern about their health (40% vs. 31%), health maintenance and promotion (47% vs. 37%), illness prevention (39% vs. 32%), to treat a specific condition (27% vs. 20%), that they are better than chemical products or drugs (40% vs. 33%), and because they heard about the benefits of the product (31% vs. 22%).

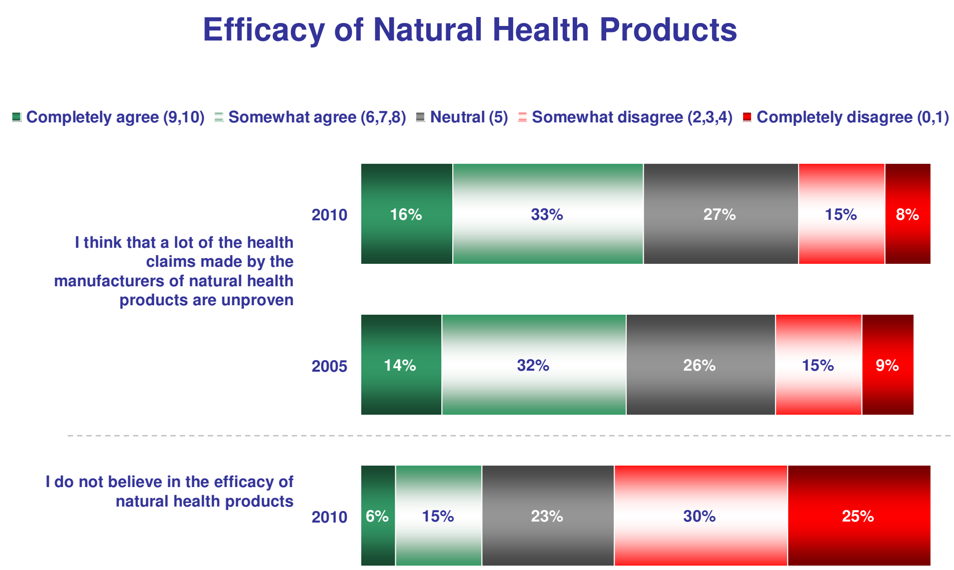
In terms of region, residents of Atlantic Canada are most likely to 'completely agree' that they decided to use natural health products because: they heard about the benefits of the products (40%), they are chemical or toxin-free (37%), and they are harmless and free of side-effects (27%). Residents of Quebec are most likely to 'completely agree' that they started using natural health products because they are concerned about their health (44%).

Older respondents are also more likely to 'completely agree' (peaking at 42% among those 55 or older) that they started using natural health products out of concern for their health.

7.2.5 Efficacy of Natural Health Products

In terms of the ability of natural health products to produce their claimed or advertised effect, respondents are quite mixed in their opinions. In both 2005 and in 2010 respondents were asked to rate their level of agreement with the statement, 'I think that a lot of the health claims made by the manufacturers of natural health products are unproven.' Since 2005, agreement has not changed significantly; close to half (49%) agree with this statement (16% completely), while 46 percent (14% completely) agreed in 2005, and similar proportions of respondents provide a neutral score of five on the scale (27% vs. 26% in 2005).

As a means to get at the crux of the matter, respondents were asked how much they agree or disagree with the statement 'I do not believe in the efficacy of natural health products.' Half of all respondents (55%) disagree with this statement, one in four (23%) remain neutral, and one in five (21%) agree (6% 'completely').



14. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements?
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Older respondents (peaking at 21% among those 55 or older) are more likely to 'completely agree' that they think a lot of the health claims made by the manufacturers of natural health products are unproven, as are men (18% vs. 14% among women).

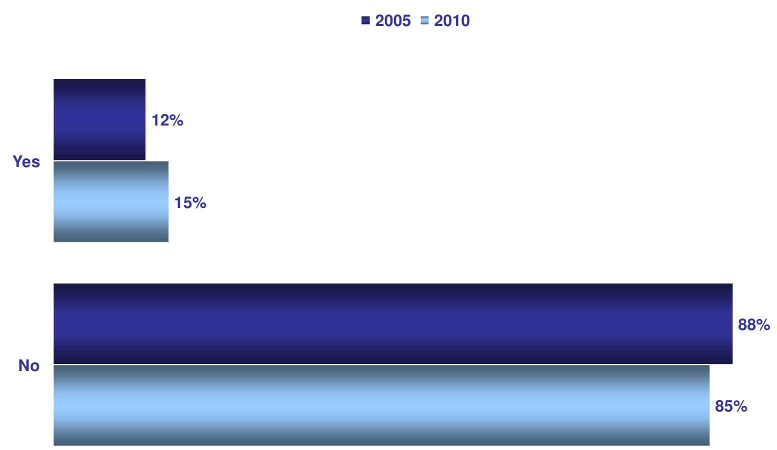
In terms of the perceived efficacy of natural health products, younger respondents (peaking at 29% among those 18 to 34) are most likely 'completely disagree' that they do not believe in the efficacy of natural health products.

7.3 Side Effects of Natural Health Products

7.3.1 Experienced Side Effects or Reactions When Using Natural Health Products

The vast majority of those who have used natural health products have not experienced any side effects (85%), however, the incidence of experiencing side effects as a result of natural health product usage has increased significantly compared to 2005 (15%, up from 12%).

Experienced Side Effects or Reactions When Using Natural Health Products



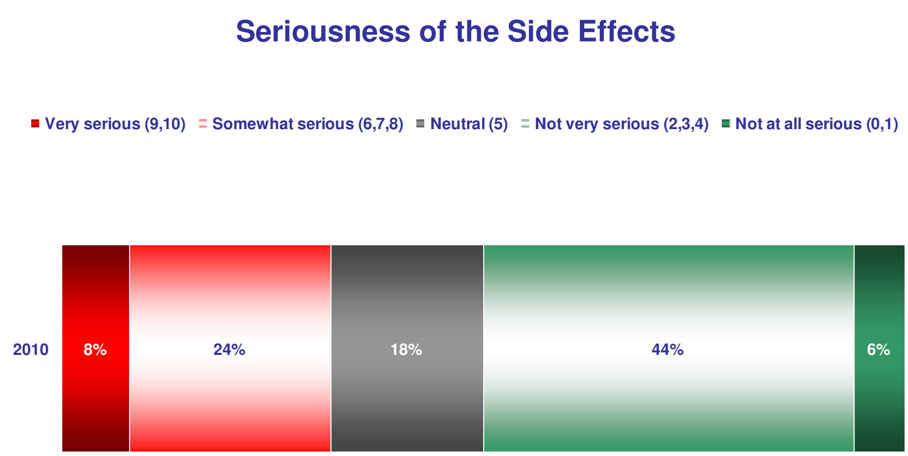
9. Have you ever experienced an unwanted side effect or reaction when using a natural health product?
2010 Base: Users of natural health product n=1,416; 2005 Base: Have used a natural health product n=1,365

Demographic Differences

As in the 2005 study there are very few significant differences in the incidence of side-effects or reactions as a result of natural health products by demographic sub-group. The exception to this is women (17%), who are significantly more likely than men (11%) to have experienced an unwanted side effect or reaction from a natural health product, which is consistent with the previous survey.

7.3.2 Seriousness of the Side Effects

When asked to rate the seriousness of the side effects experienced from natural health products, about one in ten (8%) describe them as 'very serious' (9 or 10 on a 0 to 10 scale), and about one in four (24%) describe them as somewhat serious (ratings of 6, 7, or 8). The majority of respondents (68%) provide a score of five or lower.

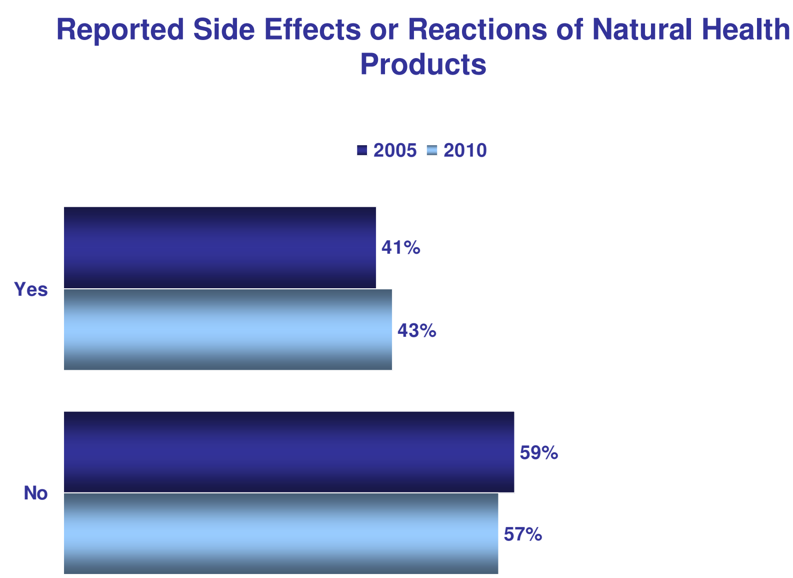


10A. On a scale from '0' to '10', where '0' means not at all serious and '10' means very serious, how serious was the side effect or reaction you experienced from using a natural health product?
2010 Base: Experienced an unwanted side effect or reaction when using a natural health product n=211

7.3.3 Reported Side Effects or Reactions of Natural Health Products

A plurality of respondents reported the side effects or reactions they experienced from using a natural health product (43% vs. 41% in 2005). This is outweighed, however, by the proportion of respondents who did not (57% vs. 59% in 2005).

Similar to the 2005 study, women (50%) are significantly more likely than men (30%) to have reported the side effects to someone.

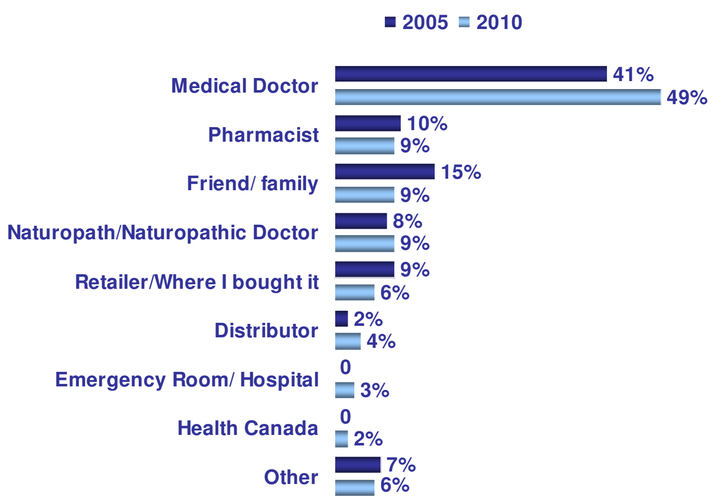


11. Did you report this unwanted side effect or reaction of the natural health product to anyone?
2010 Base: Experienced an unwanted side effect or reaction when using a natural health product n=211;
2005 Base: Have experienced an unwanted side effect when using a natural health product n=153

7.3.4 To Whom Natural Health Product Side Effects Were Reported

Those who reported their side effects (n=96) were most likely to have reported them to a medical doctor (49% vs. 41% in 2005), followed distantly by a pharmacist (9% vs. 10% in 2005), a friend or family member (9% vs. 15%), a naturopathic doctor (9% vs. 8%), or the retailer where they were purchased (6% vs. 9%).

To Whom Natural Health Product Side Effects Were Reported



Note: Responses less than 2% not shown.
Small base sizes (<100)

12. Who did you report an unwanted side effect or reaction to?
2010 Base: Did report this unwanted side effect or reaction of the natural health product n=96; 2005 Base: Did report the unwanted side effect of the natural health product n=69

7.4 Benefits and Barriers to Using Natural Health Products

This section includes the results of a number of statements on perceptions of the benefits of natural health products, as well as the degree to which various factors are barriers to using these products. Respondents were asked to rate their level of agreement or disagreement with each statement using a 0 to 10 scale where 0 means completely disagree and 10 means completely agree.

The findings in this section show that while Canadians have relatively positive impressions of natural health products, their perceptions are more negative compared to the previous iteration of the survey in 2005.

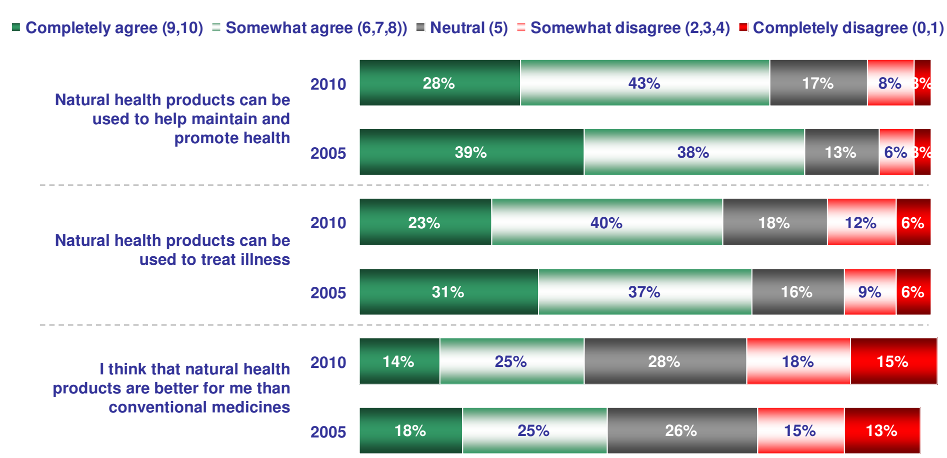
7.4.1 Benefits of Natural Health Products

Respondents consider one of the main benefits of natural health products to be that they can be used to help maintain and promote health. In fact, seven in ten (71%) respondents agree with this statement (6 or higher on the scale), with about three in ten (28%) who ‘completely agree’ (9 or 10 on the 0 to 10 scale). That said, agreement has declined significantly compared to the previous survey when 77 percent agreed (39% completely).

A large majority of respondents also agree (63%) that natural health products can be used to treat illness (with 23% who ‘completely agree’). However, when compared to 2005 the level of support has also declined, as 68 percent of respondents agreed then (and 31% strongly agreed).

Agreement that natural health products are better for one than conventional medicines elicits mixed results; 39 percent of respondents agree with this statement (14% ‘completely agree’) while, conversely, 33 percent disagree (15% ‘completely disagree’). Three in ten (28%) are neutral on the matter (score of 5 on the scale). Again, overall agreement has decreased compared to 2005, mainly with respect to the proportion of respondents who ‘completely agree’ (14%, down significantly from 18%).

Benefits of Natural Health Products



14. On a scale from ‘0’ to ‘10’, where ‘0’ means you completely disagree and ‘10’ means you completely agree, do you agree or disagree with each of the following statements?
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

Those with lower levels of income, lower levels of education, and women are significantly more likely than their respective counterparts to ‘completely agree’ that natural health products are better for them than conventional medicines, and that natural health products can be used to help maintain and promote health. Those with lower levels of education (with scores peaking among those with less than a high school education) are more likely to ‘completely agree’ that natural health products can be used to treat illness.

In terms of age, younger respondents (18 to 34) are more likely than older Canadians to ‘completely agree’ that natural health products:

- Can be used to maintain and promote health (peaking at 33% among those 18 to 34 years old); and
- Can be used to treat illness (peaking at 29% among those 18 to 34 years old).

Agreement is fairly consistent by region. Interestingly, the views of those in British Columbia have changed quite dramatically compared to 2005. In the previous survey, 27 percent of respondents ‘completely agreed’ that natural health products are better for one compared to conventional medicines, which has declined to 11 percent in this most recent sounding. Residents of Quebec differ compared to those in other regions in that they are most likely to ‘completely disagree’ with this statement (21%).

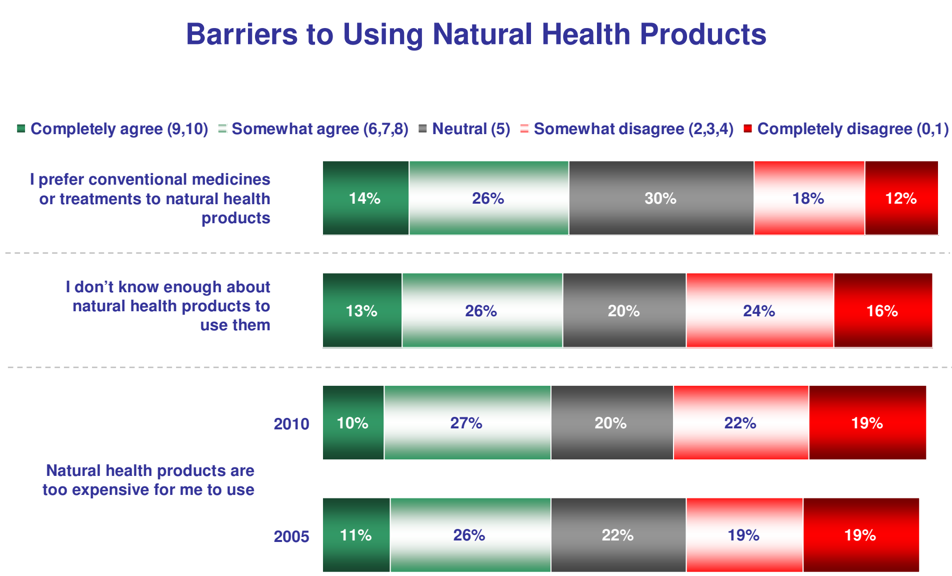
7.4.2 Barriers to Using Natural Health Products

Respondents were presented with several statements alluding to reasons for not using natural health products and were asked to rate their level of agreement using a 0 to 10 scale.

Asked for the first time in this survey, four in ten (40%) respondents agree with the statement ‘I prefer conventional medicines to natural health products’ (14% completely). Three in ten (30%) disagree. The remaining one third (30%) of respondents do not have a strong preference either way, as indicated by a rating of five.

Lack of knowledge is a barrier for a plurality of respondents. Four in ten (39%) agree that they don’t know enough about natural health products to use them, with thirteen percent (13%) who ‘completely agree’ (9 or 10 on the scale) with this statement.

In order to understand the influence cost has on whether or not one uses natural health products, respondents were asked to rate their level of agreement with the statement ‘natural health products are too expensive for me to use.’ This question was asked in both 2005 and 2010 and has produced remarkably similar results. In the most recent iteration, 37 percent of respondents agree with the statement (unchanged from 37% in 2005), while four in ten (41%) disagree (38% in 2005), and one in five (20% vs. 22% in 2005) are neutral.



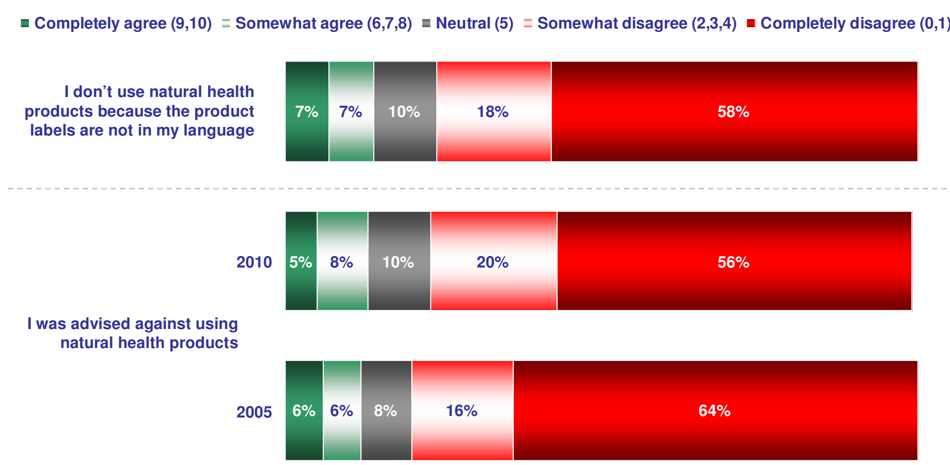
14. On a scale from ‘0’ to ‘10’, where ‘0’ means you completely disagree and ‘10’ means you completely agree, do you agree or disagree with each of the following statements?
Base: All respondents n=2,001

Barriers to Using Natural Health Products (cont'd)

The inability to read the labels on natural health product labels because they are in a different language is not a barrier to usage for most Canadians. Three in four (76%) disagree with the statement 'I don't use natural health products because the product labels are not in my language' (with 58% who 'completely disagree'). Fourteen percent agree with this statement.

The majority of respondents have not been advised against using natural health products. In fact, three in four (76%) respondents disagree that this is the case (with 56% who 'completely disagree'). When asked this question in 2005, respondents espoused a very similar opinion; 80 percent disagreed with this statement at that time. That being said, the findings indicate a decrease in this occurrence, as the proportion of respondents who 'completely disagree' has declined significantly compared to 2005 (56%, down from 64%).

Barriers to Using Natural Health Products (cont'd)



14. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements?
Base: All respondents n=2,001

Demographic Differences

The preference for conventional medicines or treatments to natural health products is most pronounced with respect to older respondents (peaking at 17% among those 55 or older), and men (17% vs. 12% among women). Residents of Quebec (21%) are also far more likely to 'completely agree' with this statement on the preference for conventional medicines compared to those in all other regions.

Complete agreement (9 or 10 on the scale) that 'I don't know enough about natural health products to use them' is highest among residents of the Prairies (19%), Quebec (17%), and Atlantic Canada (16%) compared to those in other regions. Those with lower levels of income (peaking at 16% among those with household incomes of less than $30,000 a year) are also more likely to 'completely agree' with this statement.

Similar to the 2005 survey, those with lower levels of education (peaking at 23% among those with less than a high school education) and income (peaking at 18% among those with household incomes of less than $30,000 a year) are more like to 'completely agree' that natural health products are too expensive for them to use.

Those with lower levels of education (peaking at 11% among those with less than a high school education) are more likely to 'completely agree' that they don't use natural health products because the product labels are not in their language. Additionally, residents of British Columbia (8%) and Quebec (10%) are more likely than those in Ontario to 'completely agree' with this statement.

In terms of receiving advice against the use of natural health products, those with lower levels of education (peaking at 12% among those with less than a high school education) are most likely to 'completely agree' that they were advised against using natural health products, as are older respondents (peaking at 6% among those 55 or older). The demographic trends with respect to this statement are consistent with the 2005 results.

7.5 Safety of, Trust in, and Quality of Natural Health Products

Throughout the survey a number of questions were asked to gain a better understanding of views toward the safety of, trust in and quality of natural health products.

An overwhelming majority of respondents agree (72% vs. 71% in 2005) that it is important to talk to a doctor before using a natural health product, and this opinion has changed very little compared to the 2005 study. In fact, a plurality of respondents 'completely agree' with this statement (41% vs. 42% in 2005).

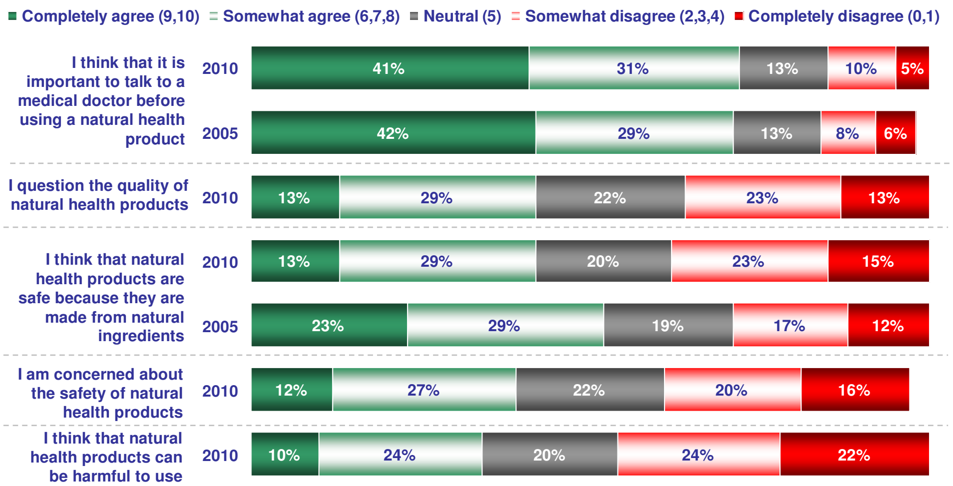
Four in ten (42%) agree (13% 'completely') that they question the quality of natural health products. Canadians are divided on this question, as 36 percent disagree with this statement. One in five (22%) provide a neutral score of five on the scale.

Canadians are less likely to think that natural health products are safe because they are made from natural ingredients than they were five years ago. Four in ten (42%) agree with the statement (13% completely agree) compared to over half (52%) who agreed in 2005. That said, the most dramatic difference is in terms of the proportion of respondents who 'completely agree', which has declined by 10 percentage points (13%, down from 23%) compared to 2005.

When asked to indicate their agreement with the statement 'I am concerned about the safety of natural health products' about four in ten (39%) agree (12% who completely agree). A similar proportion of respondents (36%) disagree that they are concerned about the safety of natural health products, and one in five (22%) are neutral (score of 5 on the scale).

Approximately one-third of respondents (34%) agree that natural health products can be harmful to use (10% completely agree). This is surpassed by the proportion of respondents who disagree with this statement (46%, with 22% who 'completely disagree'). The remaining respondents provide a neutral rating of five.

Safety of, Trust in, and Quality of Natural Health Products

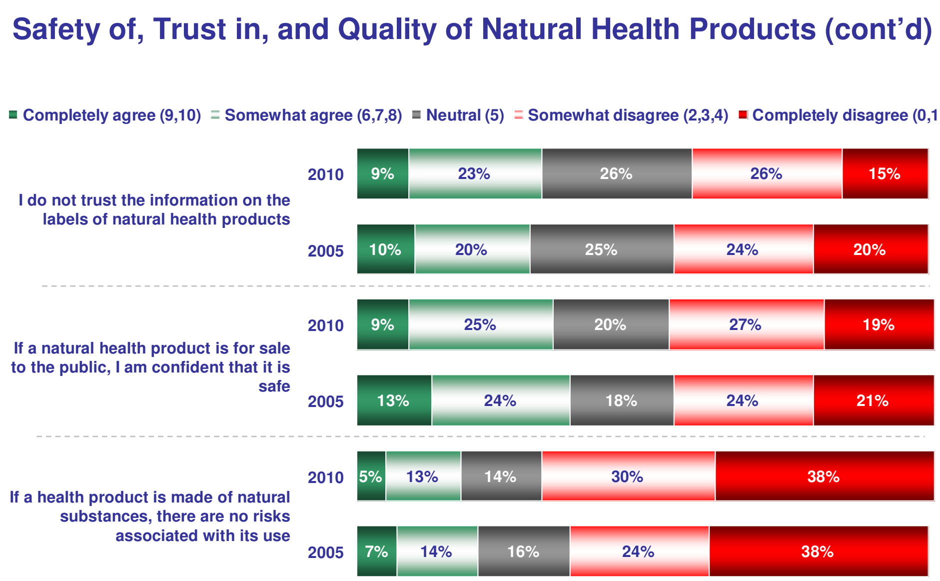


14/16. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements? Base: All respondents n=2,001

There is very little consensus when respondents are asked how much they agree or disagree with the statement ‘I do not trust the information on the labels of natural health products’, and the results have changed very little compared to 2005. Three in ten (31% vs. 30% in 2005) agree with this statement (9% vs. 10% ‘completely’), while four in ten respondents disagree (41% vs. 44% in 2005). One in four (26% vs. 25% in 2005) provide a neutral score of five.

About one third of respondents (34%) agree that if a natural health product is for sale to the public, they are confident that it is safe. That said, respondents are less likely to make this leap compared to 2005 as indicated by the significant decline in agreement compared to the previous wave (34%, down from 37%).

For most Canadians, that a health product is made of natural substances does not mean that there are no risks associated with its use. A clear majority of respondents (68%) disagree with the statement ‘If a health product is made of natural substances, there are no risks associated with its use’ (38% completely). In fact, this sentiment has become stronger compared to 2005 as overall disagreement has increased significantly (68%, up from 62%).



16. On a scale from ‘0’ to ‘10’, where ‘0’ means you completely disagree and ‘10’ means you completely agree, do you agree or disagree with each of the following statements?
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

The view that it is important to talk to a medical doctor before using a natural health product is held most strongly among those with lower levels of education (peaking at 59% among those with less than a high school education), those with lower levels of income (peaking at 51% among those with household incomes of less than $30,000 a year), older respondents (peaking at 46% among those who are 55 or older) and women (43% vs.

39% among men). These findings are largely in line with the demographic differences found for this question in the previous study.

Those with lower levels of education and income are most likely to 'completely agree' that natural health products are safe because they are made from natural ingredients and that they are concerned about the safety of natural health products. In the latter instance, older respondents (peaking at 15% among those 55 or older) are also more likely to 'completely agree'.

In terms of the statement regarding the perceived safety of natural health products because they are made from natural ingredients, it is interesting to note that while residents of Atlantic Canada are more likely than those in other regions to 'completely agree' with this statement (at 18%), this represents a significant decline compared to 2005 (30%).

Those with a university education (12%) compared to those with a high school education or some post secondary (both at 8%) are most likely to 'completely agree' that natural health products can be harmful to use.

Men (15% vs. 11% among women) are more likely to 'completely agree' that they question the quality of natural health products.

Similar to 2005, lack of trust regarding the information on the labels of natural health products tends to be highest among those with lower levels of education (peaking at 14% among those with less than a high school education) and older respondents (peaking at 13% among those who are 55 or older).

Education is a major predictor of views toward confidence in the safety of natural health products. Those with lower levels of education are significantly more likely to 'completely agree' that 'if a natural health product is for sale to the public, I am confident that it is safe' and that 'if a natural health product is made of natural substances, there is no risk associated with its use'. Moreover, those with higher levels of education are far more likely to 'completely disagree' with these statements. This finding is consistent with the results of the 2005 study.

7.6 Regulation of Natural Health Products

The following section focuses on views toward the regulation of natural health products in Canada and awareness of who is responsible for regulation in Canada.

7.6.1 Views Toward the Regulation of Natural Health Products

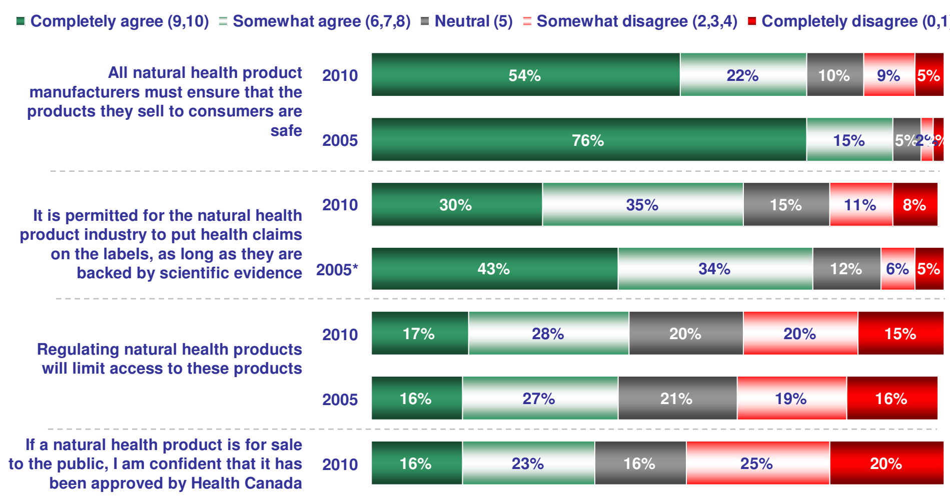
The onus placed on natural health product manufacturers to ensure that the products they sell to consumers are safe has shifted compared to the 2005 study as significantly fewer respondents agree that this should be the case. More specifically, three in four (76%, down significantly from 91% in 2005) respondents agree (54% completely, down from 76% in 2005) with the statement 'all natural health product manufacturers must ensure that the products they sell to consumers are safe'.

With respect to making claims about natural health products, nearly two in three (65%) agree (30% completely) that 'it is permitted for the natural health product industry to put health claims on the labels, as long as they are backed by scientific evidence.' One in five (20%) disagree with this statement.

Similar to the 2005 study, views toward the impact regulation of natural health products will have on accessibility to these products are mixed. Agreement with the statement 'regulating natural health products will limit access to those products' exceeds the level of disagreement by a 10-point margin (45% agree vs. 35% disagree), while the remaining one in five respondents are neutral on the issue (five on the scale). These findings have changed very little compared to 2005 when 45 percent agreed and 35 percent disagreed with this statement.

Respondents are also divided in terms of whether or not the sale of a natural health product to the public automatically means that it has been approved by Health Canada. In fact, 45 percent of respondents disagree with this statement and 39 percent agree.

Views Toward the Regulation of Natural Health Products



* In 2005 the statement wording was 'It is okay for the natural health product industry to put health claims on the labels, as long as they are backed by scientific evidence.'

17/14. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements? 2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

Residents of Quebec (59%), compared to those in the Prairies (44%) and Ontario (53%), and younger respondents (peaking at 59% among those 18 to 34 years old) are most likely to 'completely agree' that all natural health product manufacturers must ensure that the products they sell to consumers are safe. These demographic differences are new to this wave as there were no significant differences across key demographic questions in 2005.

Those with lower levels of income (peaking at 38% among those with household incomes of $30,000 or less a year) and younger respondents (peaking at 36% among those 18 to 34 years old) are most likely to 'completely agree' that it is permitted for the natural health product industry to put health claims on the labels, as long as they are backed by scientific evidence.

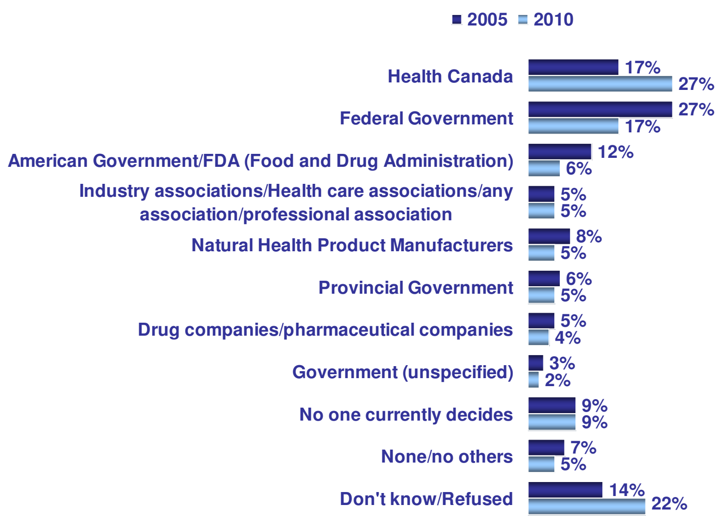
Those with lower levels of education (peaking at 22% among those with less than a high school education) and residents of Quebec (24%) compared to those in other regions are most likely to 'completely agree' that regulating natural health products will limit access to these products.

Those most likely to 'completely agree' that if a natural health product is for sale to the public, I am confident that it has been approved by Health Canada, include: residents of Atlantic Canada (21%) and Quebec (19%) compared to those in British Columbia (12%), the Prairies (9%), and Ontario (15%); those with lower levels of income (peaking at 27% among those with annual household incomes of less than $30,000), and younger respondents (peaking at 21% among those 18 to 34 years old).

7.6.2 Awareness of Natural Health Product Regulator

When asked to name the organization that currently regulates Canadian natural health products and how they are labeled, respondents are significantly more likely to mention Health Canada (27%) compared to 2005 (17%). This is followed by the federal government, mentioned by 17 percent of respondents (down from 27% in 2005). Other mentions include: the American Government/FDA (6%, down from 12%), industry/health/professional associations (5% vs. 5%), the product manufacturer (5% vs. 8%), and the provincial government (5% vs. 6%). A higher proportion of respondents (22%, up from 14% in 2005) say they don't know or refuse to provide a response.

Awareness of Natural Health Product Regulator in Canada (Total Mentions)



Note: Responses under 1% not shown.

15. Who do you think currently regulates Canadian natural health products and decides how they are labelled?
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

Those most likely to mention Health Canada include:

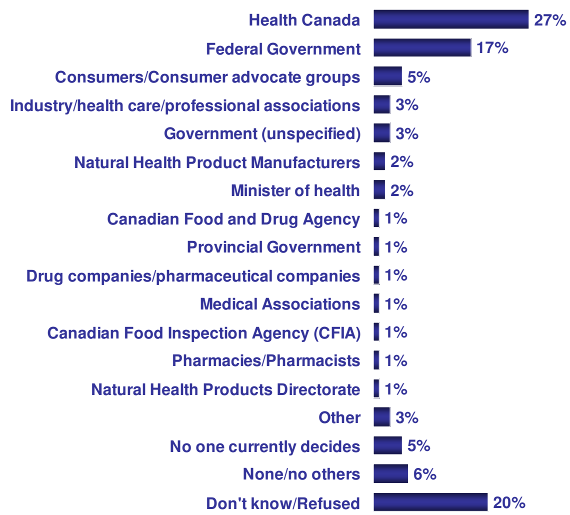
- Residents of Quebec (37%) compared to those in all other regions;
- Younger respondents (peaking at 33% among those 18 to 34 years old);
- Those with higher levels of education (peaking at 32% among those with a university education or more); and
- Those with higher levels of income (peaking at 31% among those with household incomes of $60,000 or more).

In 2005, those with higher levels of education were also more likely to mention Health Canada. This was the only other significant difference among key sub-groups of the population.

7.6.3 Awareness of Regulator Responsible for Safety, Efficacy, and Quality of Natural Health Products in Canada

When asked who is responsible for regulating the safety, efficacy, and quality of natural health products in Canada, the responses are very similar to the previous question; in fact Health Canada is mentioned most often at 27 percent, followed by the Federal Government at 17 percent. Consumer or consumer advocate groups are mentioned by five percent. All other responses are mentioned by three percent of respondents or less. One in five (20%) say they don't know or refuse to provide a response.

Awareness of Regulator Responsible for Safety, Efficacy, and Quality of Natural Health Products in Canada



15X. Who do you think is responsible for regulating the safety, efficacy, and quality of natural health products in Canada?
Base: All respondents n=2,001

Demographic Differences

Those most likely to mention Health Canada include:

- Residents of Quebec (36%) compared to those in all other regions;
- Those with higher levels of income (peaking at 32% among those with household incomes of $60,000 or more);
- Younger respondents (peaking at 30% among those 18 to 34 years old);
- Those with higher levels of education (peaking at 34% among those with a university education or more); and
- Men (30% vs. 24% among women).

The following section includes a series of statements on views toward the regulation of natural health products. Each of these statements was asked in the 2005 survey.

More than half of respondents (54%) ‘completely agree’ (9 or 10 on a 0 to 10 scale) that all natural product manufacturer’s must ensure that the products they sell to consumers are safe, with three in four (76%) who agree overall (score of 6 or higher out of 10) with this statement. Overall agreement with this statement has decreased significantly compared to 2005 (76%, down from 91% in 2005).

Three in ten respondents (30%) ‘completely agree’ that it is permitted for the natural health product industry to put health claims on the labels

Agreement with these statements is consistent regardless of whether one has used natural health products or not.

7.7 Views Toward Natural Health Product Information and Labels

This section included the results of several questions related to the information provided on natural health products, and natural health product labels. Overall there still exists a need for more information on natural health products to allow consumer to make more informed decisions and to better understand the labels on natural health products.

7.7.1 Views Toward Information Provided on Natural Health Products

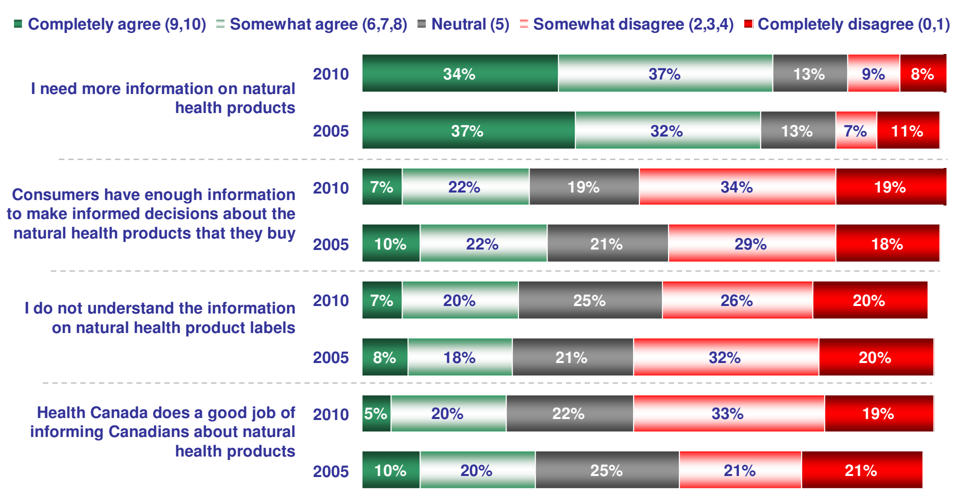
Seven in ten respondents (71%) agree that they need more information on natural health products (34% completely agree), which has remained fairly stable compared to the baseline study (69% agreement in 2005). That said, agreement has softened compared to the 2005 survey as fewer respondents completely agree with this statement (34%, down from 37%).

While three in ten (29%, down from 32% in 2005) agree that consumers have enough information to make informed decisions about the natural health products they buy (7% completely), respondents are in fact are more likely to disagree with this statement (53% disagree, up from 47% in 2005).

With respect to the information provided on natural health product labels, about three in ten (27% vs. 26% in 2005) agree that they do not understand this information. Just under half of respondents disagree with this statement (46%) which has declined compared to 2005 (52%).

Public approval of Health Canada has dropped is this regard with fewer respondents (25%, down from 30% in 2005) who agree that Health Canada does a good job of informing Canadians about natural health products. In fact, half of respondents (52%) disagree with this statement (up from 42% in 2005).

Views Toward Information Provided on Natural Health Products



16. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements?
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

Those most likely to 'completely agree' that they need more information on natural health products include: those in the Prairies (44%), those with lower levels of education (peaking at 44% among those with less than a high school education), those with lower levels of income (peaking at 43% among those with household incomes of less than $30,000 a year), and older respondents (peaking at 39% among those 55 or older). The increased knowledge among Atlantic Canada residents with respect to natural health products is evident in this question as significantly fewer 'completely agree' with this statement (28%) compared to 2005 (47%).

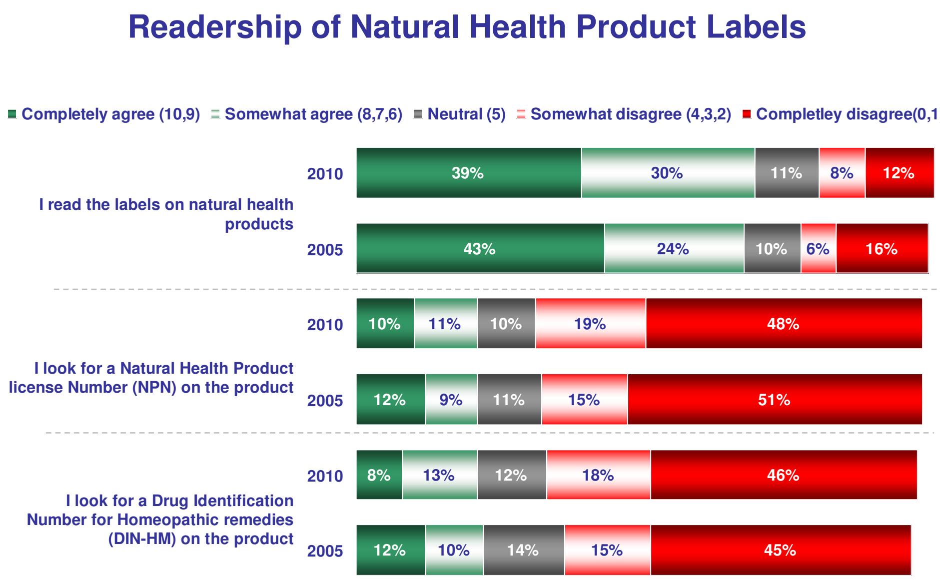
Interestingly, those with lower levels of education (peaking at 19% among those with less than a high school education) and income (peaking at 12% among those with household incomes of less than $30,000 a year) are also most likely to 'completely agree' that consumers have enough information to make informed decisions about the natural health products they buy.

Older respondents (peaking at 9% among those 55 or older), and those with lower levels of education (peaking at 12% among those less than a high school education) are most likely to 'completely agree' that they do not understand the information on the labels of natural health products.

Positive views of Health Canada (% 'completely agree' that Health Canada does a good job of informing Canadians about natural health products) in this regard are highest among those with lower levels of education (peaking at 24% among those with less than a high school education), those with lower levels of income (peaking at 13% among those with household incomes of less than $30,000 a year), and residents of Quebec (10%).

7.7.2 Readership of Natural Health Product Labels

While high proportions of respondents read the labels on natural health products (69% agree vs. 67% in 2005), relatively few agree that they look for a Natural Health Product license Number (NPN) (21% vs. 21% in 2005) or a Drug Identification Number (DIN-HM) on the product (21% vs. 22% in 2005). In fact, large proportions of respondents disagree that they look for either the NPN (48% completely disagree vs. 51% in 2005) or the DIN-HM (46% vs. 45%).



16. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements?
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

Those with high levels of education (peaking at 43% among those with a university education or higher), and lower levels of income (peaking at 44% among those with household incomes of less than $30,000 a year) are more likely to 'completely agree' that they read the labels on natural health products.

Those with lower levels of income, those with lower levels of education, and older respondents are more likely than their respective counterparts to 'completely agree' that they look for the NPN or the DIN-HM on natural health products.

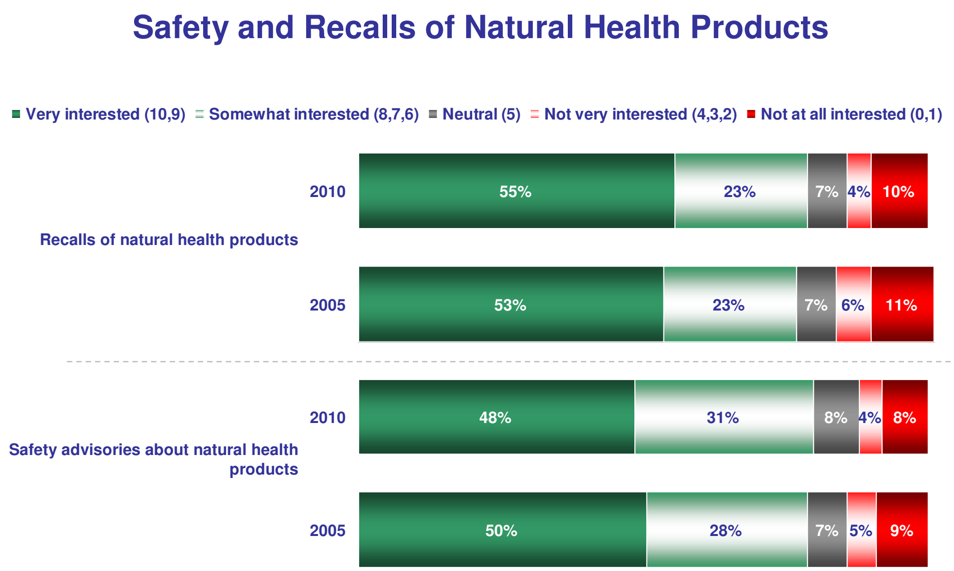
Those who have used natural health products are more likely to 'completely agree' that they read the labels on natural health products (46% vs. 20% among non-users), however users are no more likely than non-users to look for the NPN (10% vs. 11% among non-users) or the DIN-HM (9% vs. 9% among non-users).

7.8 Interest in Information on Natural Health Products

In this question respondents were asked to indicate their level of interest in several aspects of information on natural health products using a 0 to 10 scale with 0 meaning not at all interested and 10 meaning very interested.

7.8.1 Safety and Recalls of Natural Health Products

Overall, information about recalls of natural health products garnered the highest interest, with over half (55% vs. 53% in 2005) saying they are 'very interested' (9 or 10 on a 0 to10 scale) in this type of information. This is followed closely by information on safety advisories about natural health products (48% vs. 50% in 2005).

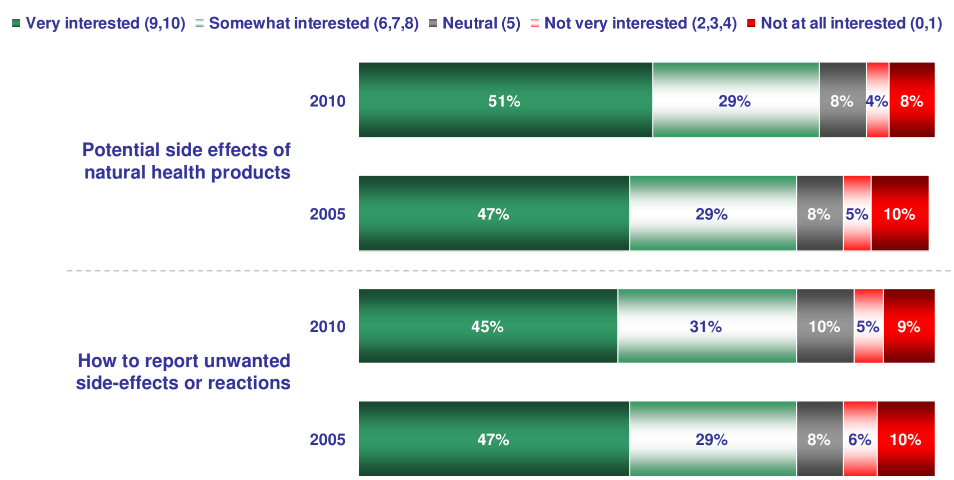


20. Using a scale from '0' to '10', where '0' means not at all interested and 10 means very interested, please tell me how interested you would be in receiving each of the following types of information.
Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

7.8.2 Side Effects of Natural Health Products

Information about the side effects of natural health products is also an area of interest to Canadians, with about half indicating that they would be 'very interested' (9 or 10 on a 0 to 10 scale) in receiving information concerning: the potential side effects of natural health products (51%, up significantly from 47% in 2005), and how unwanted side effects are reported (45% vs. 47%). When considering the proportion who are 'somewhat interested' (6,7,8 on a 0 to 10 scale), overall interest increases to about eight in ten respondents for both (80%, up from 76% in 2005 with respect to information on the potential side-effects and 76%, unchanged from 2005, for how to report unwanted side-effects or reactions).

Side Effects of Natural Health Products

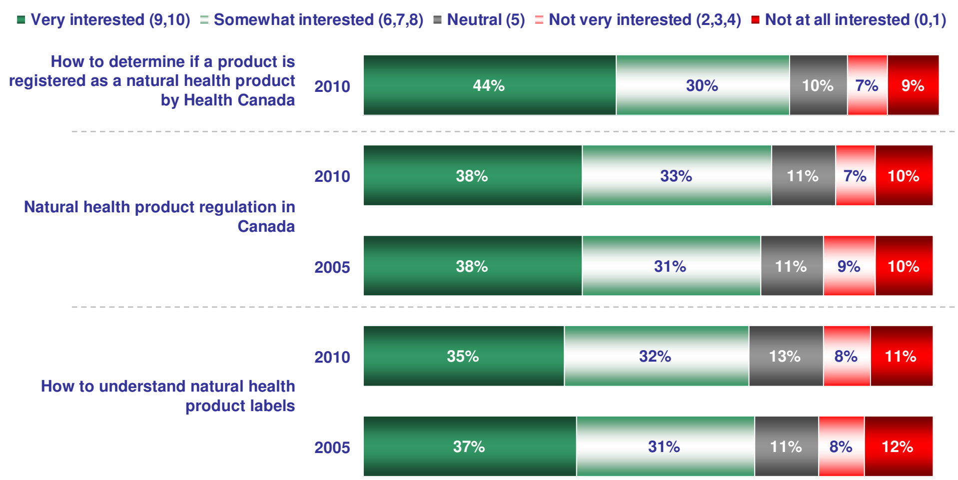


20. Using a scale from '0' to '10', where '0' means not at all interested and 10 means very interested, please tell me how interested you would be in receiving each of the following types of information.
Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

7.8.3 Natural Health Product Regulation, Registration, and Product Labels

Information about natural health product regulation, registration, and product labels occupy the next tier with about four in ten respondents indicating that they are 'very interested' (9 or 10 on a 0 to 10 scale) in this type of information. Specifically, forty-four percent (44%) are 'very interested' in receiving information on how to determine if a product is registered as a natural health product by Health Canada, followed by thirty-eight percent (unchanged from 38% in 2005) who are interested in information on natural health product regulation in Canada, and slightly fewer (35% vs. 37% in 2005) who are interested in information on how to understand natural health product labels. In each instance, about three in ten indicate a 'somewhat interested' score (6, 7, or, 8 out of 10), and one in five are not interested (score of 4 or lower).

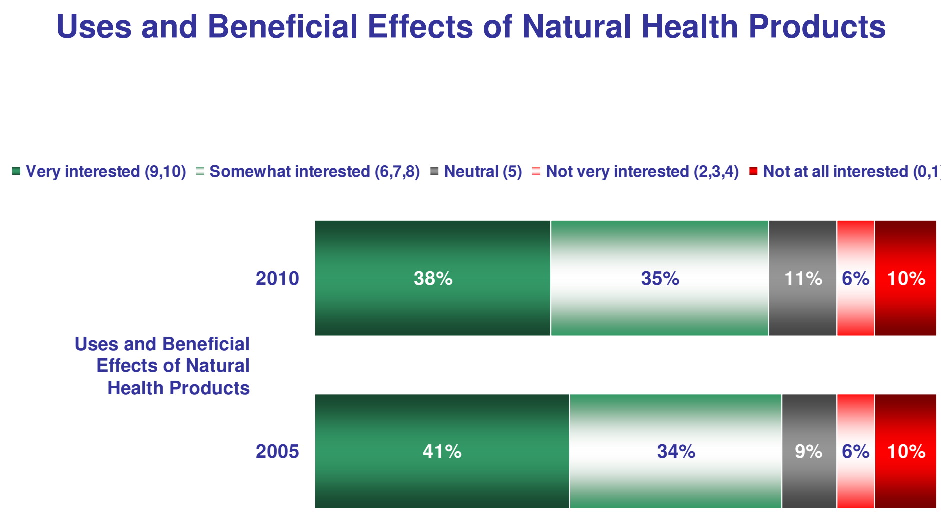
Natural Health Product Regulation, Registration and Product Labels



20. Using a scale from '0' to '10', where '0' means not at all interested and 10 means very interested, please tell me how interested you would be in receiving each of the following types of information.
Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

7.8.4 Uses and Beneficial Effects of Natural Health Products

A similar proportion of respondents (38%, down from 41% in 2005) indicate a strong interest (9 or 10 on a 0 to 10 scale) in information on the uses and beneficial effects of natural health products, with overall agreement (including the proportion of respondents who somewhat agree) increasing to nearly three in four respondents (73% vs. 75% in 2005). In both surveys, the same proportion of respondents (16%) express a lack of interest with scores of four or lower on the scale.



20. Using a scale from '0' to '10', where '0' means not at all interested and 10 means very interested, please tell me how interested you would be in receiving each of the following types of information. How about information concerning….
Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

Similar to the 2005 study, women are more likely than men to express strong interest (9 or 10 on a 0 to 10 scale) in receiving each of the various types of information on natural health products.

Additionally, residents of the Prairies (43%) and Ontario (41%) are significantly more likely than those in British Columbia (32%) to be 'very interested' in information on natural health product regulation in Canada.

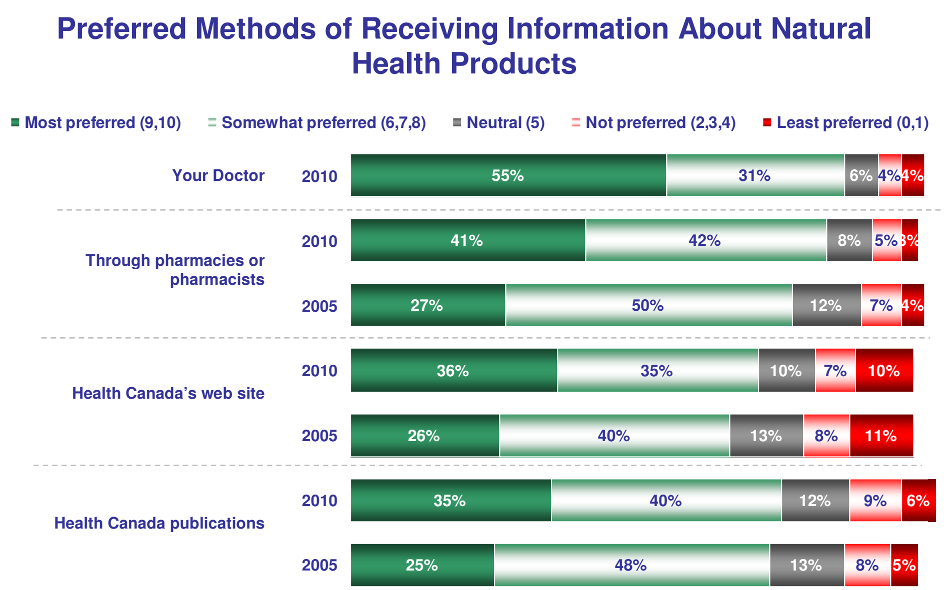
Those with higher levels of income (peaking at 57% among those with household incomes of $60,000 or more a year) are more likely than those with lower levels of income to be 'very interested' in recalls of natural health products, while those in Quebec stand out as the region with the lowest score in this regard (47%).

Those with lower levels of education are significantly more likely than those with higher levels of education to be 'very interested' in how to report unwanted side-effects or reactions (53% among those with less than a high school education), how to understand natural health product labels (40%), and natural health product regulation in Canada (50%).

7.9 Preferred Methods of Receiving Information on Natural Health Products

Respondents were presented with a series of ways in which it may be possible to receive information on natural health products, ranging from traditional health care channels (including various types of health care providers) to various media channels, and were asked to indicate how much each method was preferred.

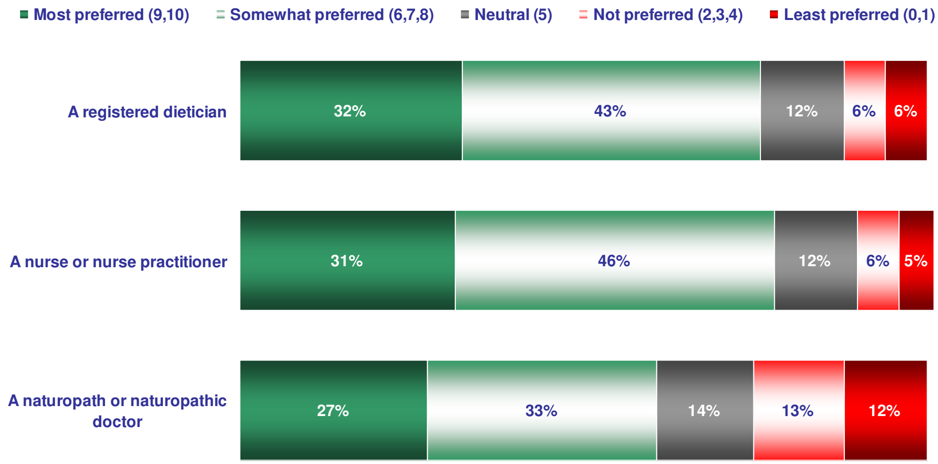
By far, the most preferred way of receiving this type of information is from one's doctor (55% indicating a 'most preferred' score of 9 or 10 on a 0 to 10 scale). This is followed by four in ten who most prefer a pharmacy or pharmacist (41%, up significantly from 27% in 2005), and a little over one third who 'most prefer' the Health Canada web site (36%, up significantly from 26% in 2005), and publications by Health Canada (35%, up significantly from 24%).



19. Using a scale of 0 to 10, where 0 means least preferred and 10 means most preferred, please tell me how much you prefer each of the following as a means of receiving information about natural health products.
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Occupying a second tier are various health care professionals, with about one third (in each instance) who most prefer a registered dietician (32% indicating a score of 9 or 10 on a 0 to 10 scale), a nurse (31%), or a naturopath (27%) for receiving this type of information.

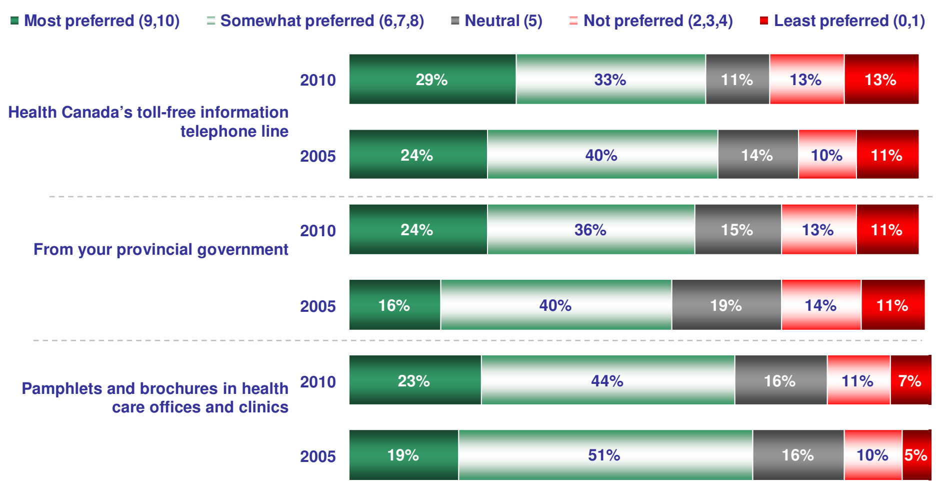
Preferred Methods of Receiving Information About Natural Health Products (cont'd)



19. Using a scale of 0 to 10, where 0 means least preferred and 10 means most preferred, please tell me how much you prefer each of the following as a means of receiving information about natural health products. Base: All respondents n=2,001

Occupying a third tier are Health Canada's toll-free information line (29%, up from 24% in 2005 indicating a 'most preferred' score of 9 or 10 on a 0 to 10 scale) one's provincial government (24%, up from 16%), and publications or pamphlets found in health care offices or clinics (23%, up from 19%).

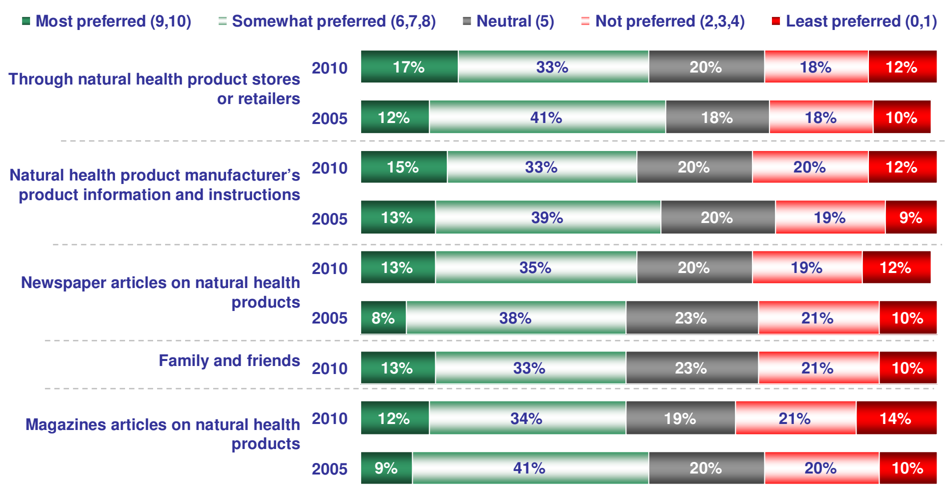
Preferred Methods of Receiving Information About Natural Health Products (cont'd)



19. Using a scale of 0 to 10, where 0 means least preferred and 10 means most preferred, please tell me how much you prefer each of the following as a means of receiving information about natural health products.
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

The methods least preferred are arguably those with the least credibility, including natural health product retailers or manufacturers, family and friends, and various media channels. Fewer than two in ten 'most prefer' (score of 9 or 10 on a 0 to 10 scale) natural health product stores or retailers (17%, up significantly from 12% in 2005), the manufacturer's product information (15% vs. 13%), a newspaper article on natural health products (13%, up significantly from 8%), family and friends (13%) and magazine articles on natural health products (12%, up significantly from 9%).

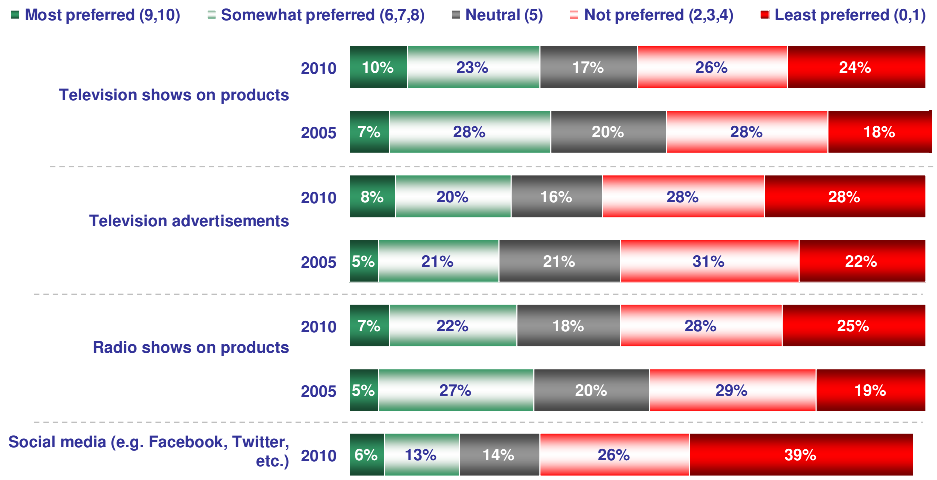
Preferred Methods of Receiving Information About Natural Health Products (cont'd)



19. Using a scale of 0 to 10, where 0 means least preferred and 10 means most preferred, please tell me how much you prefer each of the following as a means of receiving information about natural health products.
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

The least preferred methods (with about one in ten providing a 'most preferred' score of 9 or 10 on a 0 to 10 scale), relative to the other methods tested, are the following: television shows on products (10% vs. 7% in 2005), television advertisements (8% vs. 5%), radio shows on products (7% vs. 5%), and social media such as Facebook and Twitter (6%).

Preferred Methods of Receiving Information About Natural Health Products (cont'd)



19. Using a scale of 0 to 10, where 0 means least preferred and 10 means most preferred, please tell me how much you prefer each of the following as a means of receiving information about natural health products.
2010 Base: All respondents n=2,001; 2005 Base: All respondents n=2,004

Demographic Differences

In general, women (as compared to men), younger respondents (with scores peaking among those 18 to 34 years of age), and those with lower levels of income and education are most likely to provide high preference scores (9 or 10 on a 0 to 10 scale) with respect to the various methods of receiving information on natural health products provided. This trend in demographics is also evident in the 2005 study, with the exception of younger respondents, where few significant differences by age were found.

The following is a detailed summary of the demographic differences for the methods with the highest 'most preferred' ratings:

One's Doctor
Preference for receiving information on natural health products from one's doctor is consistently high across all key sub-groups of the population, with the exception of age. Younger respondents are significantly *more* likely to 'most prefer' one's doctor, peaking at 60 percent among those 18 to 34 years old.

Through Pharmacies or Pharmacists
Younger respondents (peaking at 47% among those 18 to 34 years old), and women (45% vs. 37% among men) are most likely to 'most prefer' this method.

Health Canada's Web Site
Younger respondents (peaking at 44% among those 18 to 34 years old), and women (40% vs. 32% among men) are most likely to 'most prefer' this method, as are residents of Ontario (39%) compared to those in Alberta (30%).

Health Canada's Publications

Younger respondents (peaking at 38% among those 18 to 34 years old), and women (38% vs. 31% among men) are most likely to 'most prefer' this method. Residents of Alberta stand out as the region least likely to 'most prefer' this method (26%). In many cases this is to a significant degree (as compared to those in the Prairies at 37%, Quebec at 36%, Ontario at 35%, and Atlantic Canada at 40%).

8. Appendix I – Response Rate Calculation

This table calculates the response rate among the respondents in this research based on the empirical calculation standard of the Market Research and Intelligence Association. More information on this method may be located here: http://www.mria-arim.ca/STANDARDS/Response.asp

Empirical Calculation for Data Collection	
Total Numbers Attempted	**41,566**
Invalid (NIS, fax/modem, business/non-res.)	19,128
Unresolved (U) (Busy, no answer, answering machine)	8,035
In-scope - non-responding (IS)	**12,303**
Language problem	427
Illness, incapable, deaf	155
Household refusal	11,099
Respondent refusal	622
In-scope - Responding units (R)	**2,100**
No one 18 years of age or older	35
Other disqualify	64
Completed interviews	2,001
Response Rate = R/(U+IS+R)	**9%**

9. Appendix II – Questionnaire

Hello, this is calling from Ipsos-Reid. We're a professional public opinion research company. I'd like to assure you that we're not trying to sell you anything. Today we're talking to a random sample of Canadians about some important issues. This survey is registered with the National Survey Database and is being conducted on behalf of the Government of Canada. The results will be reported in aggregate. [IF NECESSARY]Your participation is voluntary and all your answers will remain confidential.

Bonjour, ici d'Ipsos-Reid, une firme professionnelle de sondage d'opinion publique. Je tiens à vous assurer que nous ne vendons rien. Nous nous entretenons aujourd'hui avec un échantillonnage de Canadiennes et de Canadiens choisis au hasard au sujet de certains enjeux importants. Ce sondage est inscrit dans la base de données d'études nationales et est sponsorisé par le gouvernement du Canada. Les résultats seront reportes en agrégat. [AU BESOIN] Votre participation est volontaire et toutes vos réponses seront tenues confidentielles.
INSERT SURVEY REGISTRATION INFORMATION HERE
INSERT SURVEY REGISTRATION INFORMATION HERE

May I please speak with the person in your household who is 18 years of age or older and who has had the most recent birthday. Would that be you?

[IF THAT PERSON IS NOT AVAILABLE, ARRANGE CALLBACK]

Est-ce que je pourrais parler à la personne de votre foyer qui a 18 ans ou plus cet qui a fêté son anniversaire le plus récemment? Est-ce vous?

[SI LA PERSONNE N'EST PAS DISPONIBLE, FIXEZ UN RAPPEL]

Yes	[CONTINUE]
Oui	[CONTINUER]
No	[ASK TO SPEAK TO 'ELIGIBLE' PERSON]
Non	[DEMANDER DE PARLER À UNE PERSONNE « ADMISSIBLE »]
REFUSED	[THANK/DISCONTINUE]
REFUS	[REMERCIER/CONCLURE]

[IF DK OR REFUSED – THAND AND TERMINATE]

AWARENESS/KNOWLEDGE OF NATURAL HEALTH PRODUCTS
CONNAISSANCE DES PRODUITS DE SANTÉ NATURELS

1a. In what year were you born?

1a. En quelle année êtes-vous né?

[RECORD YEAR, RANGE 1900-1992]
[INSCRIRE L'ANNÉE, ÉCHELLE DE 1900-1992]
DK/RF
NSP/REFUS

1X. First off, please tell me which of the following you think are natural health products? [READ AND RANDOMIZE STATEMENTS] How about?
1X. Tout d'abord, veuillez indiquer lesquels des produits suivants sont selon vous des produits de santé naturels. Et pour ce qui est de/d'...?

Amino acids
Acides aminés
Antioxidants
Antioxydants
Herbal remedies /teas
Remèdes/tisanes à base de plantes médicinales
Homeopathic medicines/tinctures/homeopathy
Médecine homéopathique/teintures/homéopathie
Omega 3/essential fatty acids
Omégas 3/acides gras essentiels
Organic food/biologics
Aliments/produits biologiques
Sports medicine/sports drinks/sport nutrition
Médecine sportive/boissons réhydratantes/nutrition sportive
Traditional medicines
Remèdes traditionnels
Vitamins/minerals
Vitamines/minéraux

Yes
No
It depends/sometimes based on the ingredients/health claims
Cela dépends/Parfois basé sur les ingrédients/effets sur la santé

READ TO ALL: For the purpose of this study:
LIRE À TOUS : Aux fins de cette étude :

A natural health product is a product made of medicinal substances taken for one's health. These include, but are not limited to, vitamins, minerals, homeopathic products, traditional medicines, herbal remedies, and amino acids.
Un produit de santé naturel est un produit composé de substances médicinales pour améliorer la santé. Cela comprend, entre autres, les vitamines, minéraux, produits homéopathiques, remèdes traditionnels, remèdes à base de plantes médicinales et acides aminés.

3. On a scale of 0 to 10, where 0 means not at all familiar and 10 means very familiar, please tell me how familiar are you with natural health products?

3. Sur une échelle de 0 à 10, où 0 signifie pas du tout familiers et 10, très familiers, dans quelle mesure les produits de santé naturels vous sont-ils familiers?
[0-10]

[PERSONAL USE OF NHP SECTION – Estimated incidence 71%]
[SECTION SUR L'UTILISATION PERSONNELLE DES PSN – Estimated incidence 71%]

4. Have you ever used a natural health product?
4. Avez-vous déjà utilisé un produit de santé naturel?
Yes
Oui
No
Non

[IF YES, CONTINUE, OTHERWISE SKIP TO Q14]

5. Which of the following best describes you? I use natural health products [READ LIST]
5. Lequel des énoncés suivants vous décrit le mieux? J'utilise des produits de santé naturels [LIRE LA LISTE]
Daily
Chaque jour
Weekly
Chaque semaine
Monthly
Chaque mois
Only during certain seasons
Seulement durant certaines saisons
(I don't use natural heath products – volunteered)
(Je n'utilise pas de produits de santé naturels – spontanée)

[IF DON'T USE NHP SKIP TO Q14]

6. Which natural health products have you used? Anything else? [OPEN ACCEPT UP TO THREE RESPONSES – RECORD FIRST, SECOND AND THIRD MENTIONS SEPARATELY]
6. Quels produits de santé naturels avez-vous utilisés? Y en a-t-il d'autres? [QUESTION OUVERTE, ACCEPTER JUSQU'À TROIS RÉPONSES – INSCRIRE LA PREMIÈRE, LA DEUXIÈME ET LA TROISIÈME RÉPONSE SÉPARÉMENT]

(HARD CODE LIST – DO NOT READ)
(LISTE DE HARD CODE - NE PAS LIRE)
Amino acids
Acides aminés
Animal-derived health products (such as bee venom, cow gallstones, fish oil, antler, gallbladder)
Produits de santé provenant d'animaux (comme le venin d'abeille, les calculs biliaires bovins, l'huile de poisson, la ramure, la vésicule biliaire)
Antioxidants
Antioxydants
Aromatherapy products
Produits d'aromathérapie
Cold medicines

Remèdes pour le rhume
Echinacea
Échinacée
Enzymes and co-factors
Enzymes et cofacteurs
Essential oils
Huiles essentielles
Fatty acid supplements
Suppléments d'acides gras
Flower essences
Essences florales
Ginko
Ginkgo
Ginseng
Ginseng
Glucosamine
Glucosamine
Herbal remedies (algal and fungal products)
Remèdes à base de plantes médicinales (produits à base d'algues et de champignons)
Homeopathic medicines/tinctures/homeopathy
Médecine homéopathique/teintures/homéopathie
Omega 3/essential fatty acids
Omégas 3/acides gras essentiels
Other extracts or isolates (volatile oils and bioflavonoids)
Autres extraits ou isolats (huiles essentielles et bioflavonoïdes)
Probiotics (Lactobacillus)
Probiotiques (lactobacillus)
St. John's wort
Millepertuis
Synthetic duplicate
Reproduction synthétique
Tea tree oil
Huile de mélaleuca (théier)
Traditional medicines
Remèdes traditionnels
Vitamins/minerals
Vitamines/minéraux
None/No others
Rien/Rien d'autre
Other specify
Autre préciser
PLEASE SPECIFY:_____________(IF TRADITIONAL MEDICINES, TRADITIONAL CHINESE MEDICINES, AYURVEDIC PRODUCTS, ABORIGINAL PRODUCTS)
VEUILLEZ PRÉCISER :_____________(SI REMÈDES TRADITIONNELS, REMÈDES TRADITIONNELS CHINOIS, PRODUITS AYURVÉDIQUES, PRODUITS AUTOCHTONES)

7A. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements about why you decided to use natural health products? How about, I decided to use natural health products because [IF FIRST STATEMENT IS EITHER OF STATEMENTS 7, 8, OR 9 USE THIS

LEAD IN SENTENCE INSTEAD ‘How about, I decided to use natural health products’] [READ AND RANDOMIZE ALL ITEMS] How about
7A. Sur une échelle de 0 à 10, où 0 signifie que vous êtes entièrement en désaccord et 10, que vous êtes entièrement d'accord, dans quelle mesure êtes-vous d'accord ou en désaccord avec chacun des énoncés suivants concernant votre décision d'utiliser un produit de santé naturel? Qu'en est-il de l'énoncé « J'ai décidé d'utiliser des produits de santé naturels parce que [IF FIRST STATEMENT IS EITHER OF STATEMENTS 7, 8, OR 9 USE THIS LEAD IN SENTENCE INSTEAD ‘Qu'en est-il de l'énoncé « J'ai décidé d'utiliser des produits de santé naturels »] [READ AND RANDOMIZE ALL ITEMS] Pour ce qui est de

They are better for me than chemical products or drugs
Ces produits sont meilleurs pour moi que des produits chimiques/des médicaments conventionnels
I was concerned about my health
Je suis préoccupé par ma santé
I heard about the benefits of the product
J’ai entendu parler des bienfaits du produit
They are chemical or toxin-free
C'est sans produits chimiques/sans toxines
They are harmless and free of side-effects
C'est sans danger/aucun effet secondaire
They were recommended by a family member or friend
Ces produits ont été recommandés par un membre de la famille ou un ami
To help maintain and promote my health.
Pour aider à conserver et à promouvoir ma santé
To prevent illness and build my immune system
Pour prévenir la maladie/renforcer mon système immunitaire
To treat symptoms of a specific disease or illness
Pour traiter des symptômes/une maladie ou un trouble en particulier

[0-10]
9. Have you ever experienced an unwanted side effect or reaction when using a natural health product?
9. Avez-vous déjà eu des effets secondaires ou des réactions indésirables en utilisant un produit de santé naturel?
Yes
Oui
No
Non

[IF YES CONTINUE OTHERWISE SKIP TO Q14]

10A. On a scale from ‘0’ to ‘10’, where ‘0’ means not at all serious and ‘10’ means very serious, how serious was the side effect or reaction you experienced from using a natural health product?
10A. Sur une échelle de 0 à 10, où 0 signifie « pas grave du tout » et 10, « très grave », quelle a été la gravité de l'effet secondaire ressenti ou de la réaction que vous avez eue à la suite de l'utilisation d'un produit de santé naturel?

[0-10]

11. Did you report this unwanted side effect or reaction of the natural health product to anyone?
11. Avez-vous signalé à quelqu'un cet effet secondaire ou cette réaction indésirable causé par le produit de santé naturel?
Yes
Oui
No
Non

[IF YES, CONTINUE, OTHERWISE SKIP TO Q14]

12. Who did you report an unwanted side effect or reaction to? [OPEN ACCEPT ONE RESPONSE](DO NOT READ LIST)
12. À qui avez-vous signalé un effet secondaire ou une réaction indésirable? [QUESTION OUVERTE. ACCEPTER UNE SEULE RÉPONSE.](NE PAS LIRE LA LISTE)

[HARD CODES]

Aromatherapist
Aromathérapeute
Chiropractor
Chiropraticien
Distributor
Distributeur
Health Canada
De Santé Canada
Holistic Practitioner
Praticien holistique
Homeopath
Homéopathe
Industry Association
Association du domaine
Manufacturer of the product
Fabricant du produit
Medical Doctor
Médecin
Naturopath/Naturopathic Doctor
D'un naturopathe
Non-governmental organization (NGO)
Organisme non gouvernemental (ONG)
Nurse/Nurse Practitioner
D'une infirmière/infirmière praticienne
Nutritionist
Nutritionniste
Pharmacist
D'un pharmacien
Physiotherapist
Physiothérapeute
Practitioner of Traditional Chinese Medicine/Acupuncturist
Praticien de médecine traditionnelle chinoise/acupuncteur

Professional Association
Association professionnelle
Registered Dietician
D'un diététiste professionnel
Registered Massage Therapist
Massothérapeute professionnel
Retailer/Where I bought it
Détaillant/Où le produit a été acheté
Western Herbalist
Herboriste occidental
Other specify
Autre préciser

[ATTITUDES TOWARD NHP]
[ATTITUDES À L'ÉGARD DES PSN]
[ASK ALL]
[DEMANDER À TOUS]

14. On a scale from ‘0’ to ‘10’, where ‘0’ means you completely disagree and ‘10’ means you completely agree, do you agree or disagree with each of the following statements? How about [READ AND RANDOMIZE ALL ITEMS]
14. Sur une échelle de « 0 » à « 10 », où « 0 » signifie que vous êtes tout à fait en désaccord et « 10 », tout à fait d'accord, êtes-vous d'accord ou en désaccord avec chacun des énoncés suivants? En ce qui concerne l'énoncé [LIRE TOUS LES ÉNONCÉS AU HASARD]

Benefits of natural health products
Bienfaits des produits de santé naturels
I think that natural health products are better for me than conventional medicines
Je crois que les produits de santé naturels sont meilleurs pour moi que les médicaments conventionnels
I think that natural health products are safe because they are made from natural ingredients
Je crois que les produits de santé naturels sont sans danger parce qu'ils sont composés d'ingrédients naturels
Natural health products can be used to help maintain and promote health
Les produits de santé naturels peuvent être utilisés pour aider à conserver et à promouvoir la santé
Natural health products can be used to treat illness
Les produits de santé naturels peuvent être utilisés pour traiter des maladies

[CONCERNS]
[INQUIÉTUDES]
I think that a lot of the health claims made by the manufacturers of natural health products are unproven
Je crois que de nombreuses allégations sur la santé faites par les fabricants de produits de santé naturels sont sans fondement
Natural health products are too expensive for me to use
Les produits de santé naturels coûtent trop cher pour que je les utilise
I think that natural health products can be harmful to use
Je crois qu'il peut être dangereux d'utiliser des produits de santé naturels
I was advised against using natural health products

On m'a déconseillé les produits de santé naturels
I do not believe in the efficacy of natural health products
Je ne crois pas en l'efficacite des produits de santé naturels
I am concerned about the safety of natural health products
Je suis préoccupé par l'innocuité des produits de santé naturels
I don’t know enough about natural health products to use them
Je n'en connais pas assez sur les produits de santé naturels pour pouvoir les utiliser
I don’t use natural health products because the product labels are not in my language
Je n’utilise pas de produits de santé naturels parce-que les étiquettes ne sont pas écrites dans ma langue
I question the quality of natural health products
Je doute de la qualité des produits de santé naturels
I prefer conventional medicines or treatments to natural health products
Je préfère les medicaments ou les traitements conventionnels aux produits de santé naturels
If a natural health product is for sale to the public, I am confident that it has been approved by Health Canada
Si un produit de santé naturel est à vendre au publique, je suis confiant qu'il était approuvé par Santé Canada.

NATURAL HEALTH PRODUCT SAFETY/LABELLING/PURCHASING BEHAVIOUR
INNOCUITE/ETIQUETAGE/COMPORTEMENT D'ACHAT DES PRODUITS DE SANTE NATURELS

15. Who do you think currently regulates Canadian natural health products and decides how they are labelled? Any one else? [RECORD FIRST MENTION, SECOND MENTION AND THIRD MENTION SEPARATELY.] (DO NOT READ LIST)
15. Selon vous, qui réglemente présentement les produits de santé naturels canadiens et la manière dont ils sont étiquetés? Y a-t-il d'autres groupes ou organismes? [RECORD FIRST MENTION, SECOND MENTION AND THIRD MENTION SEPARATELY.] (NE PAS LIRE LA LISTE)

[HARD CODES]
Consumers/Consumer advocate groups
Les consommateurs/groupes de protection des consommateurs
Drug companies/pharmaceutical companies
Les sociétés pharmaceutiques
Federal Government
Le gouvernement fédéral
Health Canada
De Santé Canada
Industry associations/Health care associations/any association/professional association
Les associations du domaine/associations de soins de santé/autre association/association professionnelle
Marketing companies
Les entreprises de marketing
Natural Health Product Manufacturers
Les fabricants de produits de santé naturels
Natural Health Products Directorate
La Direction des produits de santé naturels
Pharmacies/Pharmacists

Les pharmacies/pharmaciens
Provincial Government
Le gouvernement provincial
No one currently decides – remove from loop
Personne ne décide actuellement – remove from loop
None/no others – remove from loop
Aucun/aucun autre – remove from loop
Don't know/not sure
Ne sait pas/incertain
Other specify
Autre préciser

15X. Who do you think is responsible for regulating the safety, efficacy, and quality of natural health products in Canada? [SINGLE MENTION ONLY] (DO NOT READ LIST)
15X. Selon vous, qui est responsable de la réglementation concernant l'innocuité, l'efficacité et la qualité des produits de santé naturels au Canada? [SINGLE MENTION ONLY] (NE PAS LIRE LA LISTE)

[HARD CODES]
Consumers/Consumer advocate groups
Les consommateurs/groupes de protection des consommateurs
Drug companies/pharmaceutical companies
Les sociétés pharmaceutiques
Federal Government
Le gouvernement fédéral
Health Canada
De Santé Canada
Industry associations/Health care associations/any association/professional association
Les associations du domaine/associations de soins de santé/autre association/association professionnelle
Marketing companies
Les entreprises de marketing
Natural Health Product Manufacturers
Les fabricants de produits de santé naturels
Natural Health Products Directorate
La Direction des produits de santé naturels
Pharmacies/Pharmacists
Les pharmacies/pharmaciens
Provincial Government
Le gouvernement provincial
No one currently decides – remove from loop
Personne ne décide actuellement – remove from loop
None/no others – remove from loop
Aucun/aucun autre – remove from loop
Don't know/not sure
Ne sait pas/incertain
Other specify
Autre préciser

[PERCEPTIONS OF NHP INFORMATION AND NHP INFORMATION NEEDS]

[PERCEPTION DES RENSEIGNEMENTS SUR LES PSN ET BESOINS D'INFORMATION SUR LES PSN]

16. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements? How about [READ AND RANDOMIZE]
16. Sur une échelle de « 0 » à « 10 », où « 0 » signifie que vous êtes tout à fait en désaccord et « 10 », tout à fait d'accord, êtes-vous d'accord ou en désaccord avec chacun des énoncés suivants? En ce qui concerne l'énoncé [LIRE AU HASARD]
Consumers have enough information to make informed decisions about the natural health products that they buy
Les consommateurs ont assez de renseignements pour prendre des décisions éclairées concernant les produits de santé naturels qu'ils achètent
Health Canada does a good job of informing Canadians about natural health products
Santé Canada fait un bon travail pour ce qui est d'informer la population canadienne sur les produits de santé naturels
I do not trust the information on the labels of natural health products
Je ne fais pas confiance aux renseignements qui figurent sur les étiquettes des produits de santé naturels
I do not understand the information on natural health product labels
Je ne comprends pas les renseignements qui figurent sur les étiquettes des produits de santé naturels
I look for a Drug Identification Number for Homeopathic remedies (DIN-HM) on the product
Je regarde si un numéro d'identification pour remèdes homéopathiques (DIN-HM) figure sur le produit
I look for a Natural Health Product licence Number (NPN) on the product
Je regarde si un numéro de produit naturel (NPN) figure sur le produit
I need more information on natural health products.
J'ai besoin de plus de renseignements sur les produits de santé naturels
I read the labels on natural health products
Je lis les étiquettes des produits de santé naturels
I think that it is important to talk to a medical doctor before using a natural health product
Je crois qu'il est important de parler à un médecin avant d'utiliser un produit de santé naturel
If a health product is made of natural substances, there are no risks associated with its use.
Si un produit de santé est fait de substances naturelles, son utilisation ne comporte aucun risque
If a natural health product is for sale to the public, I am confident that it is safe
Si un produit de santé naturel est en vente libre, je suis convaincu qu'il est sans danger

[REGULATION]
[RÉGLEMENTATION]

17. On a scale from '0' to '10', where '0' means you completely disagree and '10' means you completely agree, do you agree or disagree with each of the following statements? How about [READ AND RANDOMIZE]
17. Sur une échelle de « 0 » à « 10 », où « 0 » signifie que vous êtes tout à fait en désaccord et « 10 », tout à fait d'accord, êtes-vous d'accord ou en désaccord avec chacun des énoncés suivants? En ce qui concerne l'énoncé [LIRE AU HASARD]
(Items)
(Énoncés)

All natural health product manufacturers must ensure that the products they sell to consumers are safe
Tous les fabricants de produits de santé naturels doivent s'assurer que les produits qu'ils vendent aux consommateurs sont sans danger
It is permitted for the natural health product industry to put health claims on the labels, as long as they are backed by scientific evidence
L'industrie des produits de santé naturels peut inscrire des allégations sur la santé sur les étiquettes des produits, dans la mesure où ces allégations sont fondées scientifiquement
Regulating natural health products will limit access to these products
Le fait de réglementer les produits de santé naturels limitera l'accès à ces produits

[NHP INFORMATION]
[RENSEIGNEMENTS SUR LES PSN]

19. Using a scale of 0 to 10, where 0 means least preferred and 10 means most preferred, please tell me how much you prefer each of the following as a means of receiving information about natural health products. How about…[READ AND RANDOMIZE]
19. Sur une échelle de 0 à 10, où 0 correspond au moyen qui vous plaît le moins et 10, au moyen qui vous plaît le plus, dans quelle mesure chacun des moyens suivants de se renseigner sur les produits de santé naturels vous plaît-il? Qu'en est-il… [LIRE AU HASARD]

Health Canada publications
Des publications de Santé Canada
From your provincial government
Du gouvernement de votre province
Health Canada's toll-free information telephone line
D'une ligne téléphonique d'information sans frais de Santé Canada
Health Canada's web site
Du site Web de Santé Canada
Magazines articles on natural health products
Des articles de magazines sur les produits de santé naturels
Natural health product manufacturer's product information and instructions
Des renseignements et directives provenant des fabricants de produits de santé naturels
Newspaper articles on natural health products
Des articles de journaux sur les produits de santé naturels
Pamphlets and brochures in health care offices and clinics
Des dépliants et des brochures dans les cabinets et cliniques de soins de santé
Radio shows on products
Des émissions de radio sur les produits
Television advertisements
Des publicités à la télévision
Television shows on products
Des émissions de télévision sur les produits
Through natural health product stores or retailers
Des magasins ou des détaillants de produits de santé naturels
Through pharmacies or pharmacists
Des pharmacies/pharmaciens
A registered dietician
D'un diététiste professionnel
Your doctor

De votre médecin
Family and friends
De membres de la famille et d'amis
A naturopath or naturopathic doctor
D'un naturopathe
A nurse or nurse practitioner
D'une infirmière/infirmière praticienne
Social media (e.g. Facebook, Twitter, etc.)
Sites de réseautage social (p. ex. Facebook, Twitter)

20. Using a scale from ‘0’ to ‘10’, where ‘0’ means not at all interested and 10 means very interested, please tell me how interested you would be in receiving each of the following types of information. How about information concerning….[READ AND RANDOMIZE]
20. Sur une échelle de « 0 » à « 10 », où « 0 » signifie pas du tout intéressé et « 10 », très intéressé, dans quelle mesure seriez-vous intéressé à recevoir chacun des types de renseignements suivants? Des renseignements sur…[LIRE AU HASARD]

How to report unwanted side-effects or reactions
La façon de signaler des effets secondaires ou des réactions indésirables
How to understand natural health product labels
La façon de lire les étiquettes figurant sur les produits de santé naturels
Natural health product regulation in Canada
La réglementation sur les produits de santé naturels au Canada
Potential side effects of natural health products
Les effets secondaires possibles des produits de santé naturels
Recalls of natural health products
Les rappels de produits de santé naturels
Safety advisories about natural health products
Les avis de sécurité concernant les produits de santé naturels
Uses and beneficial effects of natural health products
Les utilisations et les effets bénéfiques des produits de santé naturels
How to determine if a product is registered as a natural health product by Health Canada
Comment déterminer si un produit de santé naturel est homologué par Santé Canada

[DEMOGRAPHICS]
[DONNÉES DÉMOGRAPHIQUES]

Now I'd like to ask you a few questions for statistical purposes only
J'aimerais maintenant vous poser quelques questions pour des fins de statistiques seulement.
21. How would you rate your health in general? Would you say that it is excellent, very good, good, fair or poor?
21. Comment évalueriez-vous votre santé en général? Diriez-vous qu'elle est excellente, très bonne, bonne, passable ou mauvaise?

Excellent
Excellente
Very Good
Très bonne
Good
Bonne

Fair
Passable
Poor
Mauvaise

22. How old are you? [RECORD IN YEARS]
22. Quel âge avez-vous? [INSCRIRE EN ANNÉES]

23. What is the highest level of formal education that you have completed? [READ LIST]
23. Quel est le plus haut niveau de scolarité que vous avez terminé? [LIRE LA LISTE]

Grade school or some high school
École primaire ou études secondaires en partie
Complete high school
Diplôme d'études secondaires
Technical, vocational post-secondary, College
Études techniques ou professionnelles postsecondaires, études collégiales
Some university
Études universitaires en partie
Complete university degree
Diplôme d'études universitaires de 1er cycle
Post graduate degree
Diplôme d'études universitaires de 2e ou 3e cycle

24. Do you have any children under the age of 18 currently living in your household?
24. Avez-vous des enfants de moins de 18 ans qui habitent présentement dans votre foyer?

Yes
Oui
No
Non

25. What is your current employment status? Are you...[READ LIST - ACCEPT ONE ANSWER ONLY]
25. Quelle est votre situation professionnelle actuelle? Êtes-vous... [LIRE LA LISTE - ACCEPTER UNE SEULE RÉPONSE]

Working full-time (35 or more hours per week)
Employé à temps plein (35 heures ou plus par semaine)
Working part-time (less than 35 hours per week)
Employé à temps partiel (moins de 35 heures par semaine)
Self-employed
Travailleur autonome
Unemployed, but looking for work
Sans emploi, mais à la recherche d'un emploi
Attending school full-time/A student
Aux études à temps plein/étudiant
Retired
À la retraite
Not in workforce (Homemaker/Unemployed/not looking for work).

Pas sur le marché du travail (au foyer/sans emploi/ne cherche pas d'emploi)
Other (DO NOT READ)
Autre (NE PAS LIRE)

26. Please tell which of the following categories best describes the annual household income of all members in your household combined? Please stop me when I get to your category.
26. Veuillez me dire laquelle des catégories suivantes décrit le mieux le revenu annuel total de tous les membres de votre foyer. Veuillez m'arrêter lorsque je mentionnerai votre catégorie.

Under $10,000
Moins de 10 000 $
$10,000 to just under $20,000
De 10 000 $ à un peu moins de 20 000 $
$20,000 to just under $30,000
De 20 000 $ à un peu moins de 30 000 $
$30,000 to just under $40,000
De 30 000 $ à un peu moins de 40 000 $
$40,000 to just under $50,000
De 40 000 $ à un peu moins de 50 000 $
$50,000 to just under $60,000
De 50 000 $ à un peu moins de 60 000 $
$60,000 to just under $70,000
De 60 000 $ à un peu moins de 70 000 $
$70,000 to just under $80,000
De 70 000 $ à un peu moins de 80 000 $
$80,000 to just under $100,000
De 80 000 $ à un peu moins de 100 000 $
$100,000 and over
100 000 $ et plus

[ASK Q27 ONLY OF USERS, YES IN Q4, ELSE CONTINUE]

27. How much money do you think you spent in 2009 on natural health products? [RECORD DOLLAR AMOUNT – WE WILL CODE INTO RANGES AT THE DATA STAGE] ALLOW FOR DECIMAL
27. Quelle somme d'argent pensez-vous avoir dépensée en 2009 pour des produits de santé naturels? [INSCRIRE LE MONTANT EN DOLLARS – CE SERA CODÉ EN ÉCHELLE À L'ÉTAPE DES DONNÉES] ACCEPTER LES DÉCIMALES