Local Market Expansion Project

Alternative Agricultural Markets in Alberta, 2012

Report

Alberta Agriculture and Rural Development

January 2013

Canada

Alberta Government

Growing Forward
A federal-provincial-territorial initiative

Acknowledgements

Funding

Alberta Agriculture and Rural Development (ARD) gratefully acknowledge funding of this project through Growing Forward, a federal-provincial-territorial initiative.

Steering Committee

Thanks are extended to the following ARD Committee members for their contributions to the development and/or review of the study:

Mimi Lee
Karen Goad
Marlene Abrams
Bill Reynolds
Jeewani Fernando
Eileen Kotowich

Author

The study was conducted by Infact Research and Consulting Inc.

408 Lessard Drive, Edmonton, Alberta T6M 1A7
Telephone: 780.487.3682 Fax: 780.484.9813 e-mail: emarkus@infactresearch.com

Contact

Further information contact:

Mimi Lee
Alberta Agriculture and Rural Development
Telephone: 780.968.3552 e-mail: Mimi.Lee@gov.ab.ca

Executive Summary

Introduction

For more than a decade Alberta Agriculture and Rural Development (ARD) has devoted resources to the development of new opportunities for farmers to market their products. In 2004, ARD established a baseline estimate of the value of five alternative market sectors for agricultural products and services and investigated their growth potential. The study was repeated in 2008 for three of the sectors. The 2012 report is the third tracking study in the series, monitoring two of the original markets – farmers' markets and farm retail – and establishing baselines for two new ones – restaurants chosen because they serve food made from Alberta ingredients and community supported agriculture or community shared agriculture (CSA)/box programs.

The trend to purchase local food, defined for the purposes of the study as, "food grown or made in Alberta", was explored for the first time in 2008. At that time the focus was on identifying the views of Alberta consumers relating to this trend. In 2012 the focus tightened, to gain an understanding of the extent to which different perspectives are held and different behaviour occurs.

These markets were defined to respondents as follows:

- *Farmers' markets*: A place or space which is open on a regular scheduled basis, where one can buy fresh fruits and vegetables, bedding plants and flowers, herbs, honey, meat and other farm products, including processed foods like jams, pies and sausages, from farmers and growers who sell at stalls or tables there.
- *Farm retail* purchasing: Buying products like fresh fruit and vegetables, flowers, bedding plants and nursery stock, herbs, meat and other farm products, including wine, honey, jams, pies and sausages, at a farm or ranch gate, a farm or ranch store or stand, a roadside stall, a greenhouse on a farm, a U-pick farm, or by Internet or mail from a farm.
- *CSA or box programs*: CSA means community supported agriculture or community shared agriculture. In both CSAs and box programs, households purchase a subscription to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products, every week.
- *Restaurant for Alberta ingredients*: Households deliberately choose to eat at a restaurant or other type of eating establishment in Alberta specifically because it served food prepared from ingredients that are grown or made in Alberta.

A telephone survey of 1,058 randomly selected Alberta household heads who felt they would be "in a position to talk about past food purchases and expenditures made by your household" was undertaken from late September through October 2012.

The Four Alternative Agricultural Market Channels

Awareness

Farmers' Markets remained the best known of the three alternative agricultural markets for which this question was asked and depth of knowledge continued to increase over the past four years (from 57% in 2004 to 74% in 2012, a gain of 17% who felt they knew 'a lot' or 'something' about them). Only 1% of the population had not heard of farmers' markets compared to approximately 15% for farm retail and 46% for CSA/box programs. Familiarity with farm retail dropped back to its 2004 level and neither channel was anywhere near as well understood as farmers' markets (35% knew 'a lot' or 'something' about farm retail and 16% about CSA/box programs).

Market size

Market penetration, the proportion of households in the population that purchased from each channel, increased dramatically since 2008 for farmers' markets (from 60% to 72%). It continued to decrease for farm retail from 34% (2004) to 30% (2008) to 27% (2012). CSA/box programs were purchased by 2% and in a population where 96% purchase from restaurants, 22% chose at least some restaurants because they use Alberta ingredients.

As a result, there was a substantial increase in the number of households purchasing from farmers' markets. Over the 12 month period September 2011 to August 2012, 1,079,000 Alberta households visited a farmers' market, a gain of 232,000 since 2008 (and that is in addition to 112,000 in the preceding four years). The estimated number of households purchasing from farm retail outlets was 416,000 (down 17,000 from 2008). Because of the small sample base, no estimate was prepared for CSA/box programs. For restaurants chosen for Alberta ingredients, the estimated number of purchasing households was 335,000.

Market value

Average per visit spending at farmers' markets increased 22% over the past four years, from $45 to $55, an amount that continues to be well in excess of inflation. There was little change in per visit spending for farm retail (from $116 to $115, or -1%). The average purchase at restaurants chosen for Alberta food was $88.

Taking the number of visits made in the past 12 months into account, annual spending per household continued to rise very substantially for farmers' markets: from $317 in 2004 to $449 in 2008 and $671 in 2012. For farm retail the annual household expenditure dropped again from $453 (2004) to $417 (2008) to $371 (2012). Household spending on CSA/box programs averaged $564 (note however, this was for an extremely small user base). Restaurants chosen for use of Alberta ingredients generated expenditures of $1,115 among their users.

The total estimated market value for each channel was as follows. It should be noted that since the estimates are based on a sample survey, the figures below may not be precise, but fall within a margin of error. The confidence interval for each estimate is shown in the body of the report.

- From September 2011 to August 2012, farmers' markets (excluding crafts) were valued at $724 million, 90% more than the $380 million in 2008 and up from $233 million in 2004. The market is now worth three times what it was eight years ago, in a period that included a major economic crisis and recession.
- Farm retail was estimated to be worth $154 million, further down from $181 million in 2008 and $191 million in 2004, a loss of one-fifth of its value since tracking began.
- Estimates for restaurants chosen for including Alberta ingredients on their menus proved to be quite substantial at $374 million. Choosing restaurants serving Alberta ingredients influenced almost 10% of all restaurant spending, far higher than the 6% of visits made, indicating that these restaurants earn a substantial price premium.

Respondent expectations for the next 12 months indicate that market growth for farmers' markets will come more from higher expenditures due mainly to more frequent shopping by current purchasers, than from new market entrants. This suggests that farmers' markets are nearing full market penetration. For farm retail, higher expenditures will depend more on gaining new market entrants, but also on more frequent purchases and higher expenditures by existing customers. Half of the CSA/box program users said they would not continue to subscribe (but again the extremely small base should be kept in mind). 6% of non-purchasers indicated interest in the channel, three times the current usage rate, but this is unlikely to become a mainstream outlet without a large increase in awareness and knowledge of the channel.

Seasonal use

Thirty-four percent (34%) of farmers' market purchasers used this channel year round – a gain of 7% since 2008. This was far higher than for farm retail at 22%. However, the majority of purchasers, 62% for farmers' markets and 73% for farm retail, visited only in summer, while 2% purchased only in winter.

Among those who did visit during a season, frequency of purchase was higher in the six-month summer period than the winter (7.9 vs. 5.1 visits for farmers' markets and 3.8 vs. 3.1 for farm retail), a difference that has increased in size over the years. Average spending per purchasing household over the summer was much higher at farmers' markets too ($541 vs. $390 for winter purchasers). This was no longer true for farm retail, where winter spending increased and summer spending dropped, to resemble the seasonal patterns of 2004 (summer $297, winter $339 per purchasing household).

Once the number of purchasers in each season was also taken into account, it was found that 81% of all visits and 79% of expenditures were made in summer for farmers' markets; 77% and 77% respectively for farm retail. This represents a decrease in the proportion of visits and expenditures occurring in summer for farm retail.

Seasonal patterns were not examined for CSA/box programs or restaurants.

Market profiles

Distinctive market characteristics for these markets were as follows:

- Purchases were made from *at least one of the four alternative markets by* 79% of households. Overall, females aged 45-54, with a post-secondary and especially a university education and a mid-range or high household income were slightly more likely to do so. They were also more likely to live in larger urban centres (over 10,000, but under 1 million population), to grow food for their own consumption and to cook most meals from scratch.
- The market for *farmers' markets* has broadened to include all lifestages except older singles, with an emphasis on the 45-55 years age group and married/couple households. The income of purchasing households has further diversified to include mid-range as well as higher incomes. Farmers' markets were most popular in the City of Calgary and larger urban centres, but less well supported in small centres.

  Year round purchasers were found more often in the City of Edmonton and the City of Calgary and among respondents with university degrees. Summer-only purchasers were found more often in the major urban centres (Fort McMurray, Grande Prairie, Lethbridge, Medicine Hat and Red Deer) and among older households (empty nesters and older singles, and people aged 55+).

  Higher expenditures at farmers' markets were associated with larger size households, a university education and the Calgary Census Metropolitan Area (CMA). Purchase frequency was more important than the amount spent at each visit in contributing to total expenditures, as was shopping at a farmers' market while on a pleasure trip in Alberta.
- *Farm retail* purchasers continued to be distinguished by more often being young families (with pre-school or elementary school aged children), in the 35-44 age group and by spending more than others. They tended to be in the mid-range or high income groups and were found proportionately more in rural locations – living on farms/ranches or in small towns, villages and hamlets.

  Farmers/ranchers were themselves more likely than average to buy at farm retail outlets year-round. Frequent purchasers and heavy annual spenders tended to purchase in both seasons.

- Households *choosing restaurants for their use of Alberta ingredients* were more likely to be in the Calgary CMA, but less likely to be used by 55+ year olds. While not statistically significant, there are indications that this channel appealed less as lifestage progressed.

  However, higher expenditures were found in empty nester households, while light spenders had a below average household income.

  Purchase frequency was highest among farm/ranch families and in rural areas, but average spending per visit was low in rural locations.
- With so few users, *CSA/box program* purchaser profiles showed no defining characteristics. Directional results suggest that younger respondents (up to age 44) and older families (with teen or older children) may have been more likely to use the program. Users were most often found in the City of Edmonton.

Food grown or made in Alberta (local food)

For the purpose of this study, the notion of 'local food' was defined as 'food grown or made in Alberta' and this phrase was used throughout the interview and in the report. Questions asked of all respondents showed that 20% had never heard the term 'local food', 75% would accept food grown or made in Alberta as local food and 5% would not.

Market size and growth

Ninety-three percent (93%) of Alberta households (90% in 2008) indicated that they had purchased food grown or made in Alberta in the past 12 months (September 2011 to August 2012), the equivalent of 1,414,000 households and a gain of 135,000 since 2008.

Of the total population, one-third of households thought they would either buy more in the next year (29%) or would start to purchase food grown or made in Alberta (4%). As only 3% thought they would buy less, the growth trend is likely to continue.

Market value

Market value for food grown or made in Alberta that was purchased at farmers' markets, farm retail outlets, CSA/box programs and restaurants chosen for using Alberta ingredients was investigated when asking questions about these alternative channels.

- On average, $47 of the $55 spent per visit to *farmers' markets* was thought to be on Alberta grown or made food. The average spent by purchasing households over the past year was estimated at $575.

  The total value of Alberta food purchased at farmers' markets was estimated at $598 million (up from $302 million in 2008), 79% of which was spent over the six month summer period. Food grown or made in Alberta was estimated to make up 83% of total farmers' market expenditures.

- For *farm retail* outlets, $108 of the $115 spent per visit was thought to be on food grown or made in Alberta, with the average spent by purchasing households over the past year being estimated at $355.

  The total value of Alberta food bought through this channel was estimated at $144 million (down $10 million from 2008), 78% of which was spent during the summer. Food grown or made in Alberta made up 93% of total estimated farm retail expenditures.
- *CSA/box programs* were purchased on a subscription basis. Bearing in mind potential variability from the very small respondent base, the average annual cost reported was $564, of which $356 was thought to be for food grown or made in Alberta. On a proportionate basis, this is much lower than for other alternative market channels.

  The total value of the market was not estimated because of the small sample size.
- Spending at *restaurants chosen for Alberta ingredients* was not a subset of the total purchased on one visit as with the other markets; rather the expenditures represented different purchases. Per visit expenditures were higher at $88 when the restaurant was specifically chosen for serving Alberta sourced food than the average restaurant purchase of $61 – a 46% price premium.

  Average annual expenditures were calculated in a number of different ways. A key finding was that per household spending on all restaurant food by all households in the population (not just purchasing households) averaged $2,597 – a figure that is remarkably close to an external estimate of $2,537 (Statistics Canada. *2010 Survey of Household spending*, including adjustment for inflation). This is the first survey estimate that could be compared to an outside criterion and provides some reassurance about the accuracy of the results being obtained.

  Purchasing households spent 39% of their annual restaurant budget on restaurants using Alberta ingredients. Among all restaurant users, the figure was 9%.

  The total value of restaurants chosen for Alberta ingredients was $374 million.

  It is not possible to estimate what proportion of the restaurant expenditures were actually made on Alberta ingredients, but the impact their use had on choice of restaurant, and the revenues accrued by these restaurants, were clearly not trivial within the total industry.

Purchasing outlets

Purchasers of food grown or made in Alberta were asked on a prompted basis where they had bought Alberta food in the past 12 months and where they bought most often.

- The source used most often was a supermarket for 51%, with 93% saying they bought food grown or made in Alberta there.
- Second most widely used as the main source were farmers' markets at 21%, among 73% who had used them to buy Alberta food in the past 12 months.
- Approximately 60% each used club stores and specialty stores, with club stores being third most likely to be chosen as the store type used most frequently (8%).

- The remaining types of outlets were used by between 2% and 47% in total; small grocery stores stood out as the most frequent supplier at 6% (43% total).

Based on where they had purchased food originating in Alberta, five shopper segments were identified as using distinctive store mixes:

- *Rural* shoppers: 23% of the market purchased food grown or made in Alberta mainly at a mix of farmers' markets, small grocery stores and farm retail outlets. They were less likely to use supermarkets.
- *Mainstream* shoppers: 23% of the market mainly used supermarkets, club stores and mass merchandisers and were less likely to use farmers' markets, farm retail or restaurants for Alberta food.
- *Specialized* outlets: 22% of households used a mix of specialty stores, farmers' markets, ethnic grocery stores and health, natural or organic food stores. They tended not to use convenience stores, small grocery stores or mass merchandisers.
- *Fringe* shoppers: 17% preferred an outlet mix that included drug stores, convenience stores, mass merchandisers and ethnic food stores. Restaurants and farmers' markets were used less as a source of food grown or made in Alberta.
- *Alternative* shoppers: 15% favoured restaurants and health, natural or organic food stores, but also supermarkets. All CSA/box program users were in this segment.

Just over one in five restaurant users had heard of the Dine Alberta program (22%). Respondents who had chosen restaurants for using Alberta ingredients were only marginally more aware at 28%. One in four of the restaurants last visited specifically because they used Alberta ingredients, was affiliated with Dine Alberta (24%).

Relationship with farmers

Respondents who had purchased from a farmers' market, farm retail or CSA/box program were asked eight questions about their relationship with, and knowledge about, the farm/ers they purchase from.

Four relationship clusters were found to exist:

- *Product Focused* purchasers: 26% of all households (34% of purchasers from farm/ers) were especially likely to know about the production practices of the farm/s and what made these products special compared to store-bought food. They were particularly likely to buy from farmers' markets.
- *Engaged* purchasers*:* 22% of all households (29% of purchasers from farm/ers) were a high involvement group that appeared to have the closest relationship to the farms they buy from. A distinguishing feature was that the large majority had visited the farm/s to see things

for themselves. They spent more on farm retail than the other segments and purchased more often at multiple alternative markets.

- *No or Little Connection:* 28% of all households (37% of purchasers from farm/ers) were less likely to know anything about their farm suppliers and were less likely than average to buy food grown or made in Alberta.
- *Non-purchasers*: 24% of households did not purchase from any of the three alternative markets and were less likely than average to buy food grown or made in Alberta anywhere else.

The 23% who "followed the progress of crops or livestock on the farms, or the dates of events", were asked how they currently communicate with the farm/s. In person contact was most widely used (81%), followed by telephone and reading displays or leaflets (49% and 40% respectively) and then e-mail and websites (32% and 31% respectively). All purchasers from farms were asked what their top two preferred methods for "keeping up to date with the activities and events at farms" were. Preferred communication methods were widely varied, with the highest responses being for e-mail, reading displays or leaflets and accessing websites, suggesting that a much more removed approach would be preferred by the wider audience. These choices were followed by in person and telephone (especially favoured by Engaged purchasers), and mail communication methods.

Influences on the decision to buy, or to not buy, food grown or made in Alberta

All respondents, whether purchasers of food grown or made in Alberta or not, were asked to rate the influence that each of 19 features had on their decision to buy, or to not buy, food grown or made in Alberta. The items were selected mainly from the open-ended responses on benefits and barriers identified in the 2008 study. The top five influencers were:

- The food itself – its freshness, quality and taste;
- Safety was in fourth place, an amazing result since the survey was conducted at the height of a major national and international recall of meat produced by Alberta's largest packing plant;
- Fifth was support for Alberta's farm families.

While no items were rated predominantly as a disincentive or barrier to purchase, a substantial minority viewed inconvenience as influencing a decision to not buy. The influencers were:

- How far they have to travel to purchase food grown or made in Alberta (greater distance functions as a barrier – and this was verified by purchasing patterns associated with farmers' markets); and
- Information on why or where to buy (lack of information functions as a barrier).

Factor analysis revealed five themes or groups of features which influenced different segments of the population. They were:

- *Pragmatic Issues*: 26% were most concerned by the price of the food and how far one need travel to buy it. Also important was having information on where and what to buy. Many who had not bought food grown or made in Alberta fell into this group and many others appeared to lack interest in food grown or made in Alberta.
- *Information*: 20% were most influenced by information on why and where to buy, labelling and signage, knowing the source of the food and the type of food grown or made in Alberta. They were especially likely to want to buy more.
- *Economic Support*: 19% were mainly motivated by the impact of purchasing food grown or made in Alberta on the provincial economy (also the community or regional economy and Alberta's family farms, but not to the same degree).
- *Health & Environment*: 19% were most influenced by health benefits, nutritional value and the environmental impact of food grown or made in Alberta. Also food safety, how the food was grown or raised and distance one would have to travel to buy it (in this case distance was probably interpreted in terms of environmental impact). They were higher spenders at farmers' markets and were especially likely to want to buy more food grown or made in Alberta.
- *Food characteristics*: For 17% the strongest influences were freshness, quality, taste and appearance of the food itself, followed to a lesser degree by food safety.

Market profile

Because such a high proportion of households purchased food grown or made in Alberta, the market profile was similar to that of the overall population. The main distinguishing characteristics were that incidence of use was slightly higher than average in empty nester households and among university graduates.

Incidence was somewhat lower in the lowest income group, suggesting that ability to afford Alberta food was a factor influencing behaviour. Households that did not grow food for their own consumption and those that did not cook most meals from scratch were less likely to buy food grown or made in Alberta

Table of Contents

Introduction

For over a decade Alberta Agriculture and Rural Development (ARD) have devoted resources to the development of new opportunities for farmers to market their products. The work has included research, distribution channel support and advice on how farmers can access and maximize their returns, among other activities.

Alternative markets for agriculture products and services may be significant contributors to economic impact across North America and a viable alternative for agriculture producers and processors seeking to diversify their operations. They offer a way to market goods and services by bypassing other intermediary channels, with a potential increase in income to the producer or processor.

In 2004, ARD established a baseline estimate of the value of five alternative market sectors for agricultural products and services and investigated their growth potential. The study was repeated in 2008 for three of the sectors.

The 2012 report is the third tracking study in the series. The markets have evolved over time and the interests of ARD have changed. These are again incorporated. The 2012 study addresses four alternative market sectors: farmers' markets, farm retail (termed farm direct in 2004), Community Supported Agriculture or Community Shared Agriculture (CSA)/box programs and restaurants chosen specifically because they serve food prepared with Alberta grown or made ingredients. Infact Research and Consulting Inc. also prepared the 2004 baseline estimates and the 2008 tracking study, so consistency in the fairly complex estimation methodology has been maintained.

The trend to purchase local food, defined for the purposes of the study as, "food grown or made in Alberta", was explored for the first time in 2008, when the focus was on identifying what the Alberta consumer perspectives on this trend were. ARD's involvement in promoting and supporting the trend has changed over the past four years and the focus in 2012 tightened, with greater interest expressed in understanding the extent to which different perspectives are held and different behaviour occurs.

Purpose and objectives

The purpose of the study was two-fold:

- To obtain current information on Alberta consumer expenditures in four alternative markets, namely farmers' market, farm retail, community supported agriculture (CSA)/box program and restaurant/foodservice offering locally sourced ingredient menu features; and to compare this information with data collected in 2004 and 2008 where applicable;

- To track Alberta consumers' perceived benefits and barriers to buying local food defined as "food grown or made in Alberta", and assess the importance of local food market channels and level of access to these major market channels across six geographic categories: City of Edmonton, City of Calgary, Edmonton Census Metropolitan Area (CMA), Calgary CMA, other major centres (Fort McMurray, Grande Prairie, Lethbridge, Medicine Hat and Red Deer) and rural (all other areas in Alberta).

Objectives for each alternative market channel were to report and analyze observed changes in…

1. Consumer awareness
2. Market penetration
3. Total market value
4. Market growth potential
5. Market profiles

… and to report on the

6. Market value of local food purchased through these alternative market channels

Methodology

SURVEY METHOD

A telephone survey of randomly selected households located throughout the province of Alberta was undertaken during late September and October 2012.

Interviews were conducted with male or female household heads who felt they would be, "in a position to talk about past food purchases and expenditures made by your household".[1] As a result, answers reflected the purchasing behaviour of all members of the household. Since this was the overriding criterion for respondent selection, a gender quota was not imposed. As it transpired, the views of both men and women were well represented through the achieved 38:62 split (down slightly from the previous 41:59 ratio).

Separate samples were prepared for six geographic areas. Random digit dialling was conducted, which included unlisted, non-published numbers that make up a substantial proportion of larger urban centres' residential telephone bases. In addition, 20% of the telephone contact list was made up of cell phone numbers to ensure that non-landline owning households – often younger households – were included in the sample.

---

1. The word "food" was added to the screening criterion in 2012 since non-food services were not included in the survey this year. The change may be the reason that the proportion of male respondents dropped slightly.

An average of 5.3 and up to 8 calls was made to each in-service telephone number attempted. Appendix I shows the disposition of attempted and successful calls, using the call summary standard endorsed by the Market Research and Intelligence Association (MRIA).

Interviews were conducted using Computer Aided Telephone Interviewing (CATI).

Sample size

The initial survey wave yielded a sample of 1,000 interviews completed on landlines, meeting quotas by region. A second wave of 58 interviews was completed on cellphones throughout the province. Both samples included households that did and did not use any of the alternative market channels.

The cellphone interviews were folded into the original sample by proportionately downweighting the responses of the landline respondents and weighting the total sample to correct regional proportions.

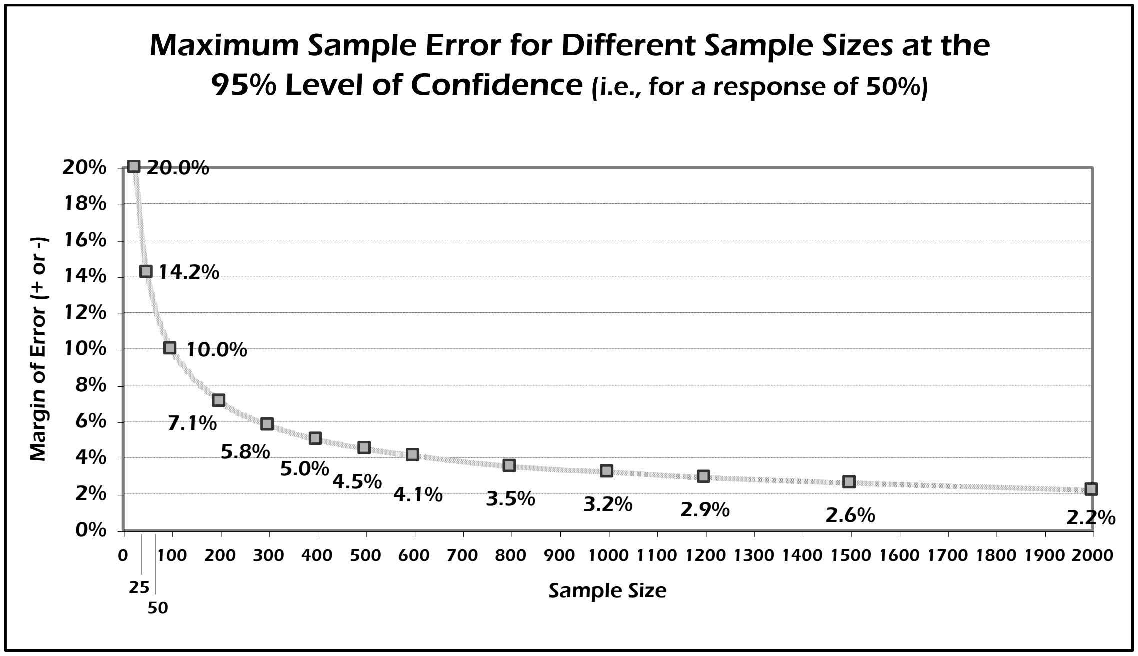
At the 95% level of confidence, the maximum sample margin of error for a random sample of 1,058 (the total sample used in the analysis) is ±3.1%. This means that if the survey were to be repeated 20 times, we would expect to see the total line results within 3.1% of those measured in this sample on 19 of those occasions.

The sample size obtained for each market, including for Alberta grown or made food (i.e., local food), and the associated margin of error, is shown in Table 1.

Table 1: Sample size and margin of error for purchasers in each market

	Number of purchasing households		Margin of error (95% level of confidence)
	Unweighted sample	Weighted sample	
Farmers' markets	752	710	± 3.6%
Farm retail	289	274	± 5.9%
CSA/box programs	18	17	± 23.6%
Restaurants chosen for use of Alberta ingredients	234	221	± 6.5%
At least one of the four alternative markets	834	786	± 3.5%
Alberta grown or made food	985	931	± 3.3%
Total Sample	**1,058**	**1,000**	**± 3.1%**

Other sub-sample findings, such as those of different geographic, demographic and purchase intensity groups had larger margins of error associated with their results, since sub-sample sizes were smaller. The graph below provides a reference to the margin of error associated with various (unweighted) sample sizes.



SAMPLE DISTRIBUTION

The sample was distributed proportionately to the population of households in each of six regions, based on Canada Post statistics for "total residential points of call" during September/October 2012. The distribution and the obtained sample are shown in Table 2.

Table 2: Population and sample size by sampling region

	Number of households	Household distribution %	Obtained sample - unweighted	Obtained sample - weighted
City of Calgary	461,611	30.4	330	304
Calgary Region	33,830	2.2	26	22
Total Calgary CMA	*495,441*	*32.6*	*356*	*326*
City of Edmonton	350,915	23.1	243	230
Edmonton Region	135,768	8.9	95	91
Total Edmonton CMA	*486,683*	*32.1*	*338*	*321*
Other Major Centres (Fort McMurray, Grande Prairie, Lethbridge, Medicine Hat, Red Deer)	152,117	10.0	103	100
Rural	384,167	25.3	261	253
Total Alberta	**1,518,468**	**100.0**	**1,058**	**1,000**

CMA = Census Metropolitan Area
Note: Rural = All areas other than those listed.

QUESTIONNAIRE

For the original two alternative markets being monitored – farmers' market and farm retail – the question approach used in 2004 and 2008 was replicated to ensure that any changes were real and not a by-product of the research design itself.

Questions for the two new markets in 2012 – CSA/box programs and restaurants chosen for Alberta ingredients – were modelled on the same basis as the original markets wherever possible.

Questions introduced in 2008 to address purchase and perceptions of local food were modified to elicit a complete set of information from all respondents and additional questions on relationships with farms/farmers were added.

The questionnaire was pilot tested and minor programming changes were made. Final survey time averaged 19 minutes. The questionnaire is included as Appendix IV.

The approach used to measure the value of the alternative markets was developed on the basis of focus group research conducted in 2004 with members of the public. The questions were designed to help respondents provide the most accurate data from which to derive market estimates. The downside of the approach taken was that it did result in a complex questionnaire, with greater than normal challenges in questionnaire programming and data analysis.

The survey was analyzed using SPSS, an advanced statistical analysis program. All questions were extensively cross-tabulated. In addition, special programs were written to prepare case-based per purchase, annual visit and expenditure estimates, as well as confidence intervals for key incidence and expenditure measures.[2] The estimates were then extrapolated to the population of Alberta households using formulae in Excel. Output from the SPSS analysis for each of the channels is shown in a separate volume of tabulations. Output from the Excel analyses is included in tables in the written report.

Minor differences between the tabulations and the graphs or charts in this report are due to rounding of numbers. Rounding and/or multiple responses may also result in totals not adding to 100%.

---

2. Note: A case based estimation approach was used in order to produce confidence intervals for the estimates.

VALIDATION OF SAMPLE QUALITY

It is useful to examine how representative of the population the final sample proved to be. Obviously, not all populations can be reached in a household telephone survey – for example, the homeless, residents of continuing care facilities and prisons.

Since the sample was based on household heads rather than individuals in the population, the most appropriate comparisons are with household measures. Four recent estimates were obtained from Statistics Canada data for this study: household structure, household size, age of the household maintainer (assumed to be similar to a household head) and household income. The validating figures are based on the 2011 Federal Census, which had slightly different definitions and, where information is no longer collected in Census, from the Survey of Household Spending in 2010. It should be remembered that surveys are based on samples, so there is a margin of error associated with each survey figure (see Table 3).

The obtained distribution indicates that the 2012 survey included somewhat more families without children, and somewhat fewer one-person households than are found in the general population. The individuals surveyed included fewer younger household heads (under age 45) and more mature respondents, a direction that is consistent with the household structure data.

In the past four years it has become fairly standard practice to quota the age of respondents to ensure that the obtained sample represents the population, and/or to weight the results by age and gender or other important demographic criteria. As this survey was only conducted with a household head who could report on household food purchases, the target distribution was not known so neither demographic quotas nor weights could be applied.

A more important comparison is therefore with the 2008 and the 2004 surveys, since that influences the estimates and conclusions about trends. This comparison is shown in Appendix II. Differences tend to be in the same direction as noted above. The 2012 sample also includes more university and fewer high school graduates than previous waves of the survey.

Table 3: Comparison of survey distribution with Census data

Category and definition	2011 Census (Alberta) %	Survey (wn=1,000) %
Household structure		
Census: One family household – couple with children at home Survey: A married/couple respondent in a 2+ person household with children of any age	32	34
Census: One family household – couple without children at home Survey: A married/couple respondent without children of any age in the household	27	32
Census: One family household - Lone parent families Survey: A non-married/couple respondent in a 2+ person household with children of any age	9	7
Census: Multi-family household or one family household with additional persons Survey: Not available	2	Included above
Census: Two or more person, non-family household Survey: A non-married/couple respondent in a 2+ person household without children of any age	6	7
Census: One person household Survey: One person household	25	20
Household size		
Average household size	2.6	2.6
Age of household head*		
Under 25	5	2
25 - 44	40	29
45 - 64	38	49
65+	17	20
Household income *		
Average household income	$95,000	$90,000

* Age of household maintainer and income data source: Statistics Canada. *Survey of Household Spending in 2010*. Detailed Table 62F0031X, n=1,291.

2012 ARD survey reflects 2011 income. Estimate of average income is approximate as it was calculated on mid-point values in a limited number of categories.

REPORT FORMAT

Key findings from the tables and analyses produced for each market are presented and discussed in the remainder of this report. Data from the 2004 baseline and 2008 tracking measures are included for comparison, to identify trends. For more detail on answers to each question in the survey, the reader is referred to the separate set of tabulations.

The remainder of the report is split into five sections:

- The first examines awareness of each alternative market. Since awareness must exist for consumers to purchase from a market channel, this is a critical foundation for understanding the potential for market change and the need for creation of awareness or greater familiarization with the market.
- The second section looks at market penetration, that is, the number of households that purchased from each channel over the previous 12 months, and the number that expect to enter or exit the market in the next year.
- The third section deals with the estimated value of each market in the previous year and market potential over the next 12 months. It includes a discussion of frequency and value of purchases and addresses expected changes in purchasing behaviour among current purchasers.
- The fourth section profiles the demographic, geographic and behaviour characteristics of each alternative market.
- The fifth and last section examines purchasing behaviour and motivations relating to food grown or made in Alberta.

Inter-group comparisons noted in the report, whether demographic, geographic or behavioural – are based on statistically significant differences unless specifically noted as directional only. Distinctions between sub-group profiles may be useful in understanding each alternative market, in planning future development strategies and in marketing to the target groups with the highest potential yield.

Summary of Findings

1. Awareness of Alternative Agricultural Markets

PRODUCT DEFINITIONS

Consumer orientated definitions used to describe each of the alternative markets to survey respondents formed part of the first question asked for most markets. The definitions for farmers' market and farm retail were expanded to include further examples in 2008. In 2012 there was one potentially material change for farmers' markets, namely the addition of "meat".

The questions read as follows:

- How much do you know about farmers' markets, that is, a place or space which is open on a regular scheduled basis, where one can buy fresh fruits and vegetables, bedding plants and flowers, herbs, honey, meat and other farm products, including processed foods like jams, pies and sausages, from farmers and growers who sell at stalls or tables there.
- How much do you know about farm retail purchasing, that is, buying products like fresh fruit and vegetables, flowers, bedding plants and nursery stock, herbs, meat and other farm products, including wine, honey, jams, pies and sausages, at a farm or ranch gate, a farm or ranch store or stand, a roadside stall, a greenhouse on a farm, a U-pick farm, or by Internet or mail from a farm.
- How much do you know about CSA or box programs? CSA means community supported agriculture or community shared agriculture. In both CSAs and box programs, households purchase a subscription to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products, every week.

Since familiarity was not measured for restaurants, the definition was provided in the first question dealing with purchase:

- In the past 12 months, did you or any member of your household deliberately choose to eat at a restaurant or other type of eating establishment in Alberta specifically because it served food prepared from ingredients that are grown or made in Alberta?

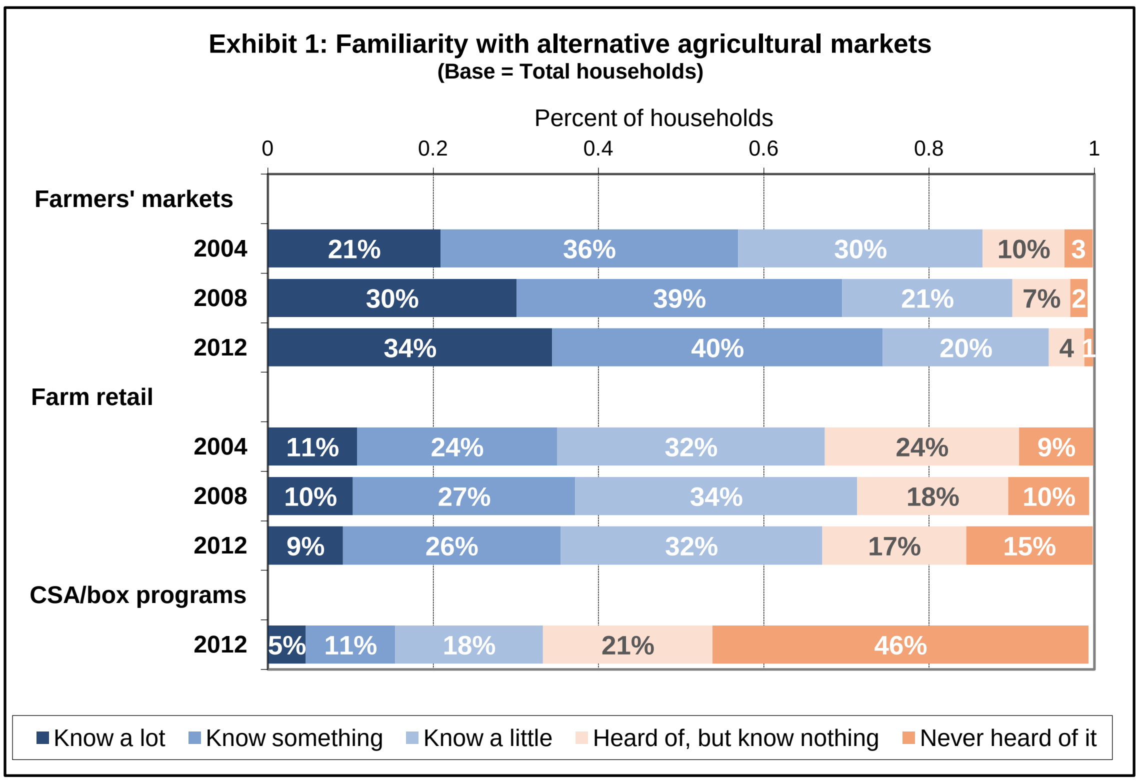
In the remainder of this report, these alternative agricultural markets (a supply-side designation) are also referred to interchangeably as "markets" and "channels".

Awareness and Familiarity

Each of the above descriptions was followed by the question: "Overall, would you say you know a lot about it, know something about it, know a little about it, have heard of but know nothing about it or you have never heard of it?"

This measure provides a reading of awareness (have or have not heard of it) as well as familiarity (how much is known about it).

The results are shown in Exhibit 1 and compared to levels achieved in 2004 and 2008. They show that Albertans remain far more familiar with farmers' markets than the other channels. This is demonstrated by considerably higher levels of knowledgeability, where almost three-quarters now know "a lot" or "something" about farmers' markets, while few said they had only heard of them or had never heard of them – and this proportion again decreased over the past four years.



Farm retail made no gains in familiarity and, in fact, showed that a higher proportion than before were completely unaware of the channel (15%) – a step backwards in marketing this channel.

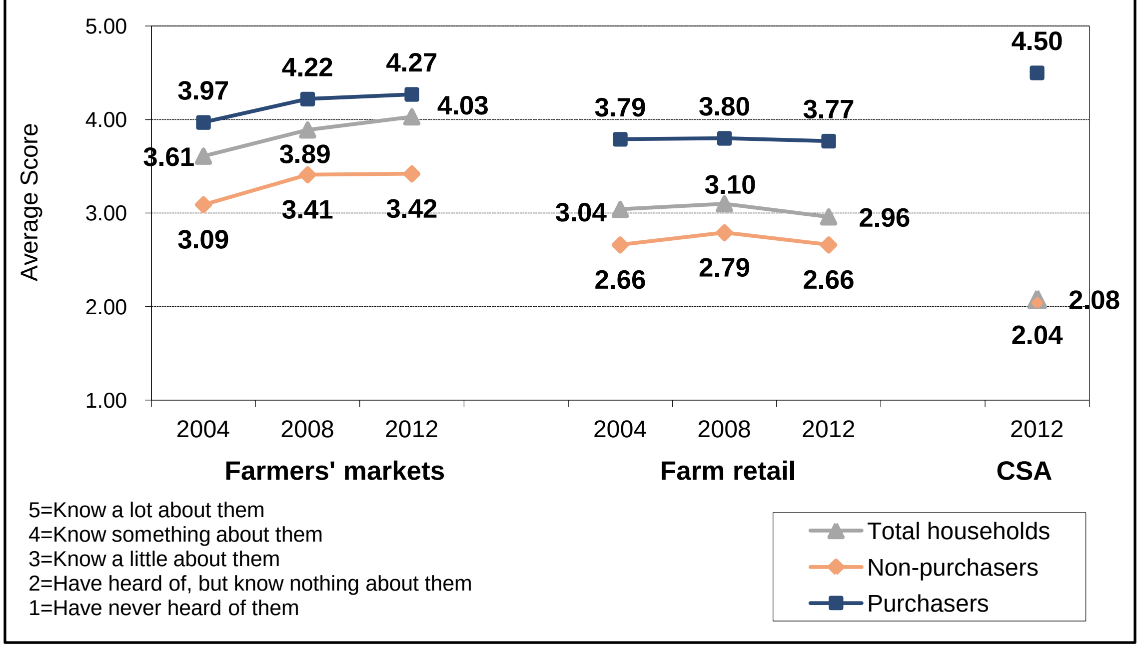
CSA/box programs were measured for the first time in 2012. Almost half of all Alberta householders (46%) had never heard of them, while only 34% knew anything at all about them.

Creating awareness is without doubt the most significant challenge facing market development for CSA/box programs.

Potential for market expansion exists for both farm retail and CSA/box programs once more people understand what these markets have to offer.

Exhibit 2 shows – as might be expected – that purchasers of all channels were likely to be more familiar with them than non-purchasers. However, the gains in familiarity that are a necessary precursor to increasing market penetration have still not occurred for farm retail. Familiarity remained the same as eight years ago among non-purchasers.

Exhibit 2: Average familiarity score by whether purchased the product or not
(Base = Total households, purchasers and non-purchasers in each market)



The gain found among farmers' market non-purchasers in 2008 was not repeated in 2012, suggesting that market awareness may have reached saturation.

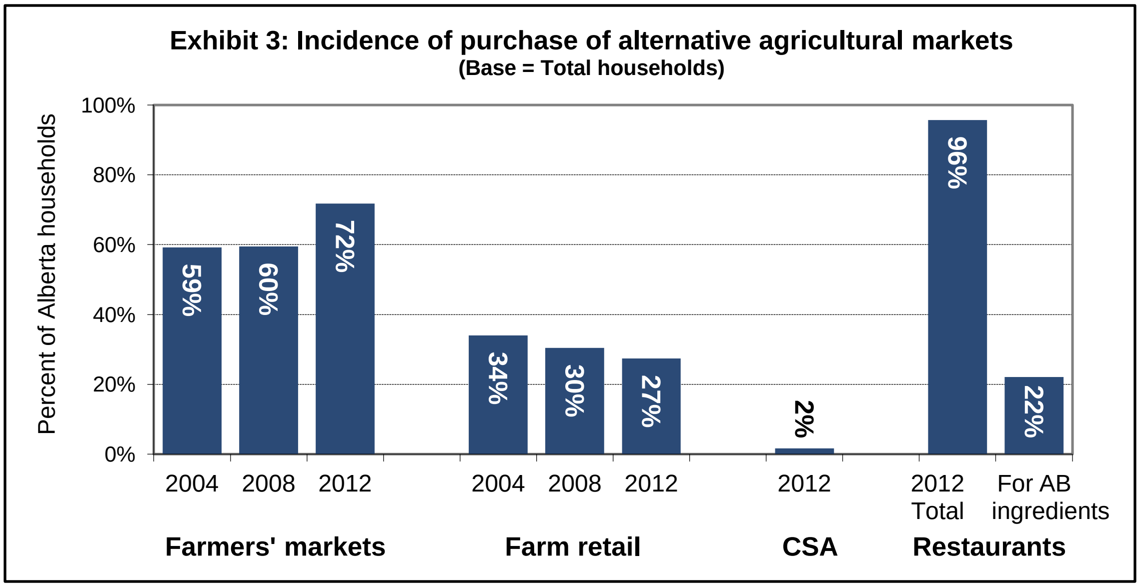
The interesting finding for CSA/box programs is just how much better users know the programs than non-users, who on average know nothing at all about them. The score for purchasers is also higher than for the other two markets, though the very small base of purchasers (wn=17) should be noted.

2. Current and projected market size

MARKET SIZE

Incidence

Consistent with the far higher level of awareness found for farmers' markets, this also remained the most widely used alternative agricultural market, with a new high of 72% of households indicating that they had made at least one purchase in the past 12 months. The figure is statistically different from the 60% who had purchased from farmers' markets in 2008. The results may be seen in Exhibit 3.



The incidence of purchase from farm retail outlets continued to decline and was significantly less than it was in 2004.

CSA/box programs were purchased by 2% of households.

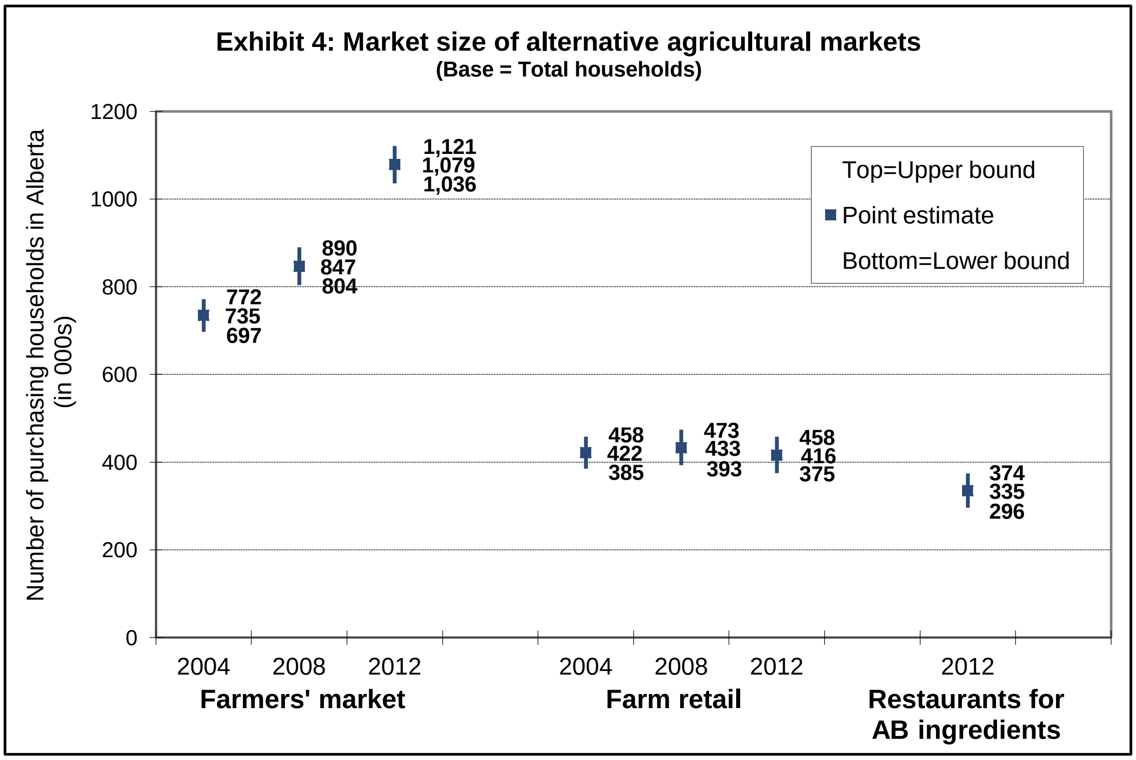
To provide context for the remaining market, restaurants chosen for Alberta ingredients, respondents were also asked about their purchase of food at restaurants in general.[3] Exhibit 3 shows that 96% of households went to restaurants at least once in the previous year. The alternative market of interest, restaurants that are specifically chosen because they serve food prepared from Alberta ingredients, had a 22% incidence rate. This means that almost one in four restaurant users choose restaurants that serve Alberta food at least some of the time.

3. The question asked was, "In the past 12 months, that is, between September 2011 and August 2012, did you or any member of your household PURCHASE food at a restaurant, hotel restaurant, diner, grill, pub, bistro, café, tea house, food truck or other eating establishment?"

Number of purchasing households

When projected to the total population of 1.52 million households in Alberta, results suggest that 1.19 million households purchased from at least one of the alternative agricultural channels over the period September 2011 to August 2012, the majority from farmers' markets.

Estimates of the number of households supporting each channel in the past year are shown in Exhibit 4. Along with the point – or "best" – estimate, the upper and lower bounds of the confidence interval are displayed. Based on the sample error associated with the user sample size obtained for each channel, the "true" number may lie anywhere between these bounds, not necessarily at the point estimate.



From these results it may be seen that:

- Over the past four years farmers' markets gained an additional almost one quarter of a million purchasing households (232,000) – a 26% increase – for a total of 1.08 million. This gain stemmed primarily from increased market penetration rather than population growth.[4]
- There was a slight decrease in the number of households purchasing via farm retail channels to 416,000, a loss of 17,000 due to the decrease in market penetration. This occurred in spite of population growth. Market size in 2012 was not significantly different to 2004 or 2008 as demonstrated by the overlap between the estimation lines.

4. Total number of households in Alberta in 2008 was 1.42 million. This represents a population increase from 2008 to 2012 of approximately 96,000 households, a growth rate of almost 7%.

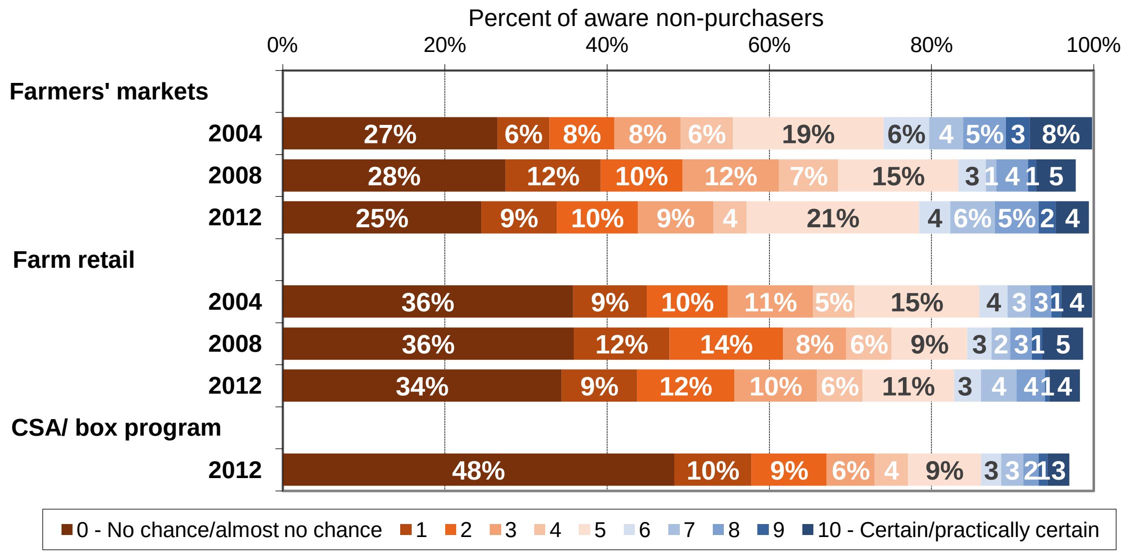
- The size of the market for restaurants serving food made with Alberta ingredients is smaller than for farmers' markets or farm retail.

Projected Market Growth

Survey respondents who had not purchased from a particular alternative market in the preceding 12 months were asked about their likelihood of doing so in the next year. The question asked was: "If 0 means 'no chance' and 10 means 'certain or almost certain', what number would you choose between 0 and 10 to describe how likely you and members of your household would be to purchase … (channel) in Alberta in the next 12 months?"

Households that provided a rating above the mid-point (six or higher – see Exhibit 5 for the distribution of responses where ratings of 6+ are shown in blue) were assumed to be interested in the channel. The results indicate that, among non-purchasing household heads who were aware of the existence of the channel, higher levels of interest were shown for farmers' markets and farm retail than for CSA/box programs.

Exhibit 5: Non-purchaser chances of purchasing each product in the next year
(Base=Non-purchasers who were aware of the product)



The degree of interest in farmers' markets rebounded to some degree from its loss in 2008, though the proportion of non-purchasers interested, at 21%, remained below the 2004 level.

Future interest remained stable for farm retail at 15% but was slightly lower for CSA/box programs at 12%. Almost half of non-users indicated that there was no chance they would purchase CSA/box programs, suggesting that this will remain a small market channel compared to the others in the immediate future.

Further indicators of interest and intent are found in Table 4, which converts the proportion of the population likely to become purchasers to the total number of new households that could enter the market in the next 12 months. The table also shows the current market size and the number of households that do not plan to continue to purchase through a channel next year. When added together, these numbers provide an estimate of potential market size in the next year. Finally, the table shows the percentage increase the total potential change in market size represents over the existing population of purchasing households.

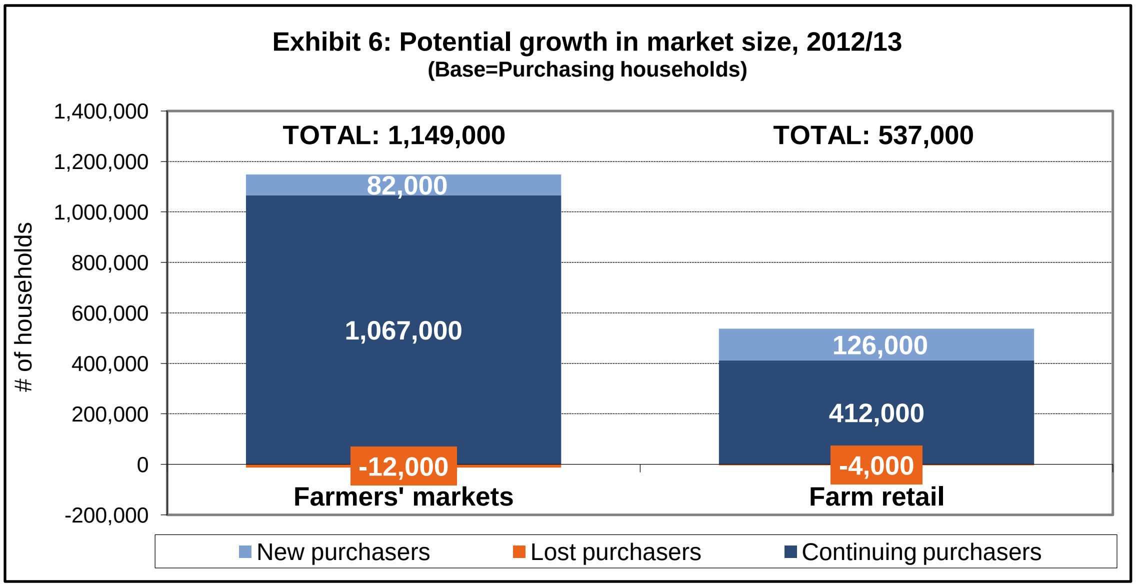
Projections for CSA/box programs are not shown due to extremely small bases, but the raw numbers are reported below. Similar information was not collected for restaurants.

Table 4: Projected growth in market size (number of purchasing households) in the next year*

	2012 Estimate (000)	Confidence Interval 2012	
		Lower bound (000)	Upper bound (000)
Farmers' markets			
# of new households interested in purchasing in next 12 months	82	61	102
# of households that purchased in the past 12 months	1,079	1,036	1,121
# purchasing households that will not continue to do so	-12	-4	-20
PROJECTED MARKET SIZE IN 12 MONTHS	**1,149**	**1,094**	**1,204**
Projected rate of growth in the next 12 months %*	6%	6%	7%
Farm retail			
# of new households interested in purchasing in next 12 months	126	101	151
# of households that purchased in the past 12 months	416	374	458
# purchasing households that will not continue to do so	-4	1	-9
PROJECTED MARKET SIZE IN 12 MONTHS	**537**	**475**	**599**
Projected rate of growth in the next 12 months %*	29%	27%	31%

Note: Figures may not add due to rounding.
* Based on consumers' stated expectations (i.e., not projections based on purchasing data or trends).

The information for farmers' market and farm retail is summarized graphically in Exhibit 6.



Observations that may be made about the data in Table 4 and Exhibit 6 are as follows:

- The number of potential non-purchasers that could become purchasers was highest for farm retail. This also represents the highest potential growth rate. In the face of a declining trend in farm retail market size, the reasons for non-buyers not converting to become purchasers need to be identified and addressed.
- The number of new purchasers is expected to well exceed the number that does not plan to continue using each channel.
- None of the alternative agricultural markets have reached a saturation point; all are projected to grow in size. This includes CSA/box programs.

However, a very high proportion of CSA/box program purchasers – 7/17 users – do not expect to continue to subscribe. The reasons for this high rate of fallout need to be understood in order to maintain existing customers, a far easier task than recruiting new ones. Although interest from potential new purchasers eclipsed current use with 61 non-users providing a rating of 6/10 or higher, for this change to occur, much greater knowledge about and promotion to the market is required. As many as two-thirds of these high potential purchasers knew little or nothing about CSA/box programs and were probably reacting to the description read out to them. The comparable figure in the far better known and more mature farmers' market was 30%. For farm retail though, more than half the potential purchasers (54%) also had little or no knowledge of the channel opportunities and this may be a reason that potential purchaser numbers were not realized. Without awareness creation and understanding of what the channel has to offer, this state of affairs may well continue.

3. Market value

To estimate the value of each alternative agricultural market, a major objective of this tracking study, respondents were asked to provide several pieces of information. These included:

- **The season in which purchases were made from each channel.** Three seasons were defined in 2012: fall from September to October 2011, winter from November 2011 to April 2012, and summer from May to August 2012. For consistency with the previous surveys, fall and summer were combined into a six-month summer period, analogous to the summer of 2003 (May to October 2003), while winter had the same definition as before (November to April in all three studies). The combined 2011/12 fall/summer period is referred to as “summer” throughout this report.
- **The number of times purchases were made in each season by any member of the household.** The question was phrased, “How many times did you or any members of your household purchase…”
- **Expenditure on the last visit in each season.** If a respondent could not remember the exact amount, s/he was asked to estimate. Special instructions were included for several markets:
    - Purchasers at farmers’ markets in all survey waves and farm retail for the first time in 2012, were asked to exclude spending on crafts.
    - For restaurants, the many examples of different types of eating establishments did not include fast food outlets, but they were not specifically excluded. The question wording asked for spending on food.

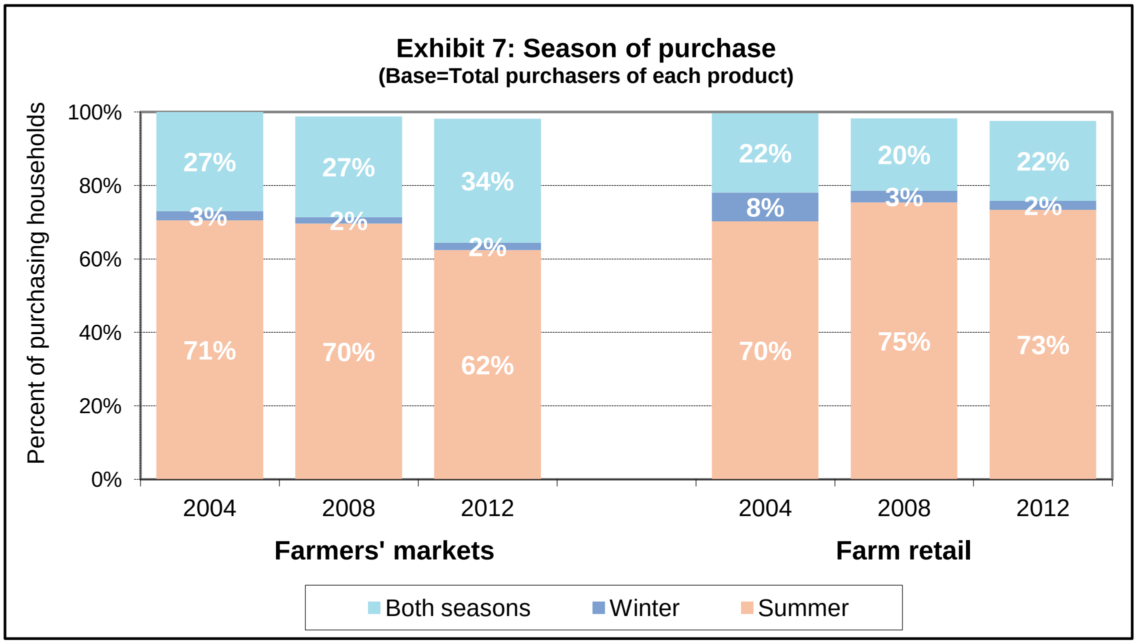
The findings are first discussed separately for each question and then the estimates generated by combining the data are presented.

Seasonality

Seasonal profiles for farmers’ market and farm retail are depicted in Exhibit 7. CSA/box programs and restaurants were measured on an annual basis only.

Both markets continued to be predominantly seasonal, with greater access in the summer. Farmers’ markets showed a significant increase in the proportion of purchasing households that make these visits both in summer and winter and this may be one reason for increased sales.

There was little variation in seasonality for farm retail, with the decline of winter-only purchasers first identified in 2008 continuing to be maintained.



FREQUENCY OF PURCHASE

Exhibit 8 depicts the average number of visits made for each channel over the year and during each season by households that purchased in that season. Note that the figure for the annual number of visits is the average number made during the 12 month period by purchasers who provided complete information for all the seasons in which they visited, while the figures for summer and winter are based on people providing complete information just for that season. As a result, the seasonal figures cannot be added, and the bases vary.

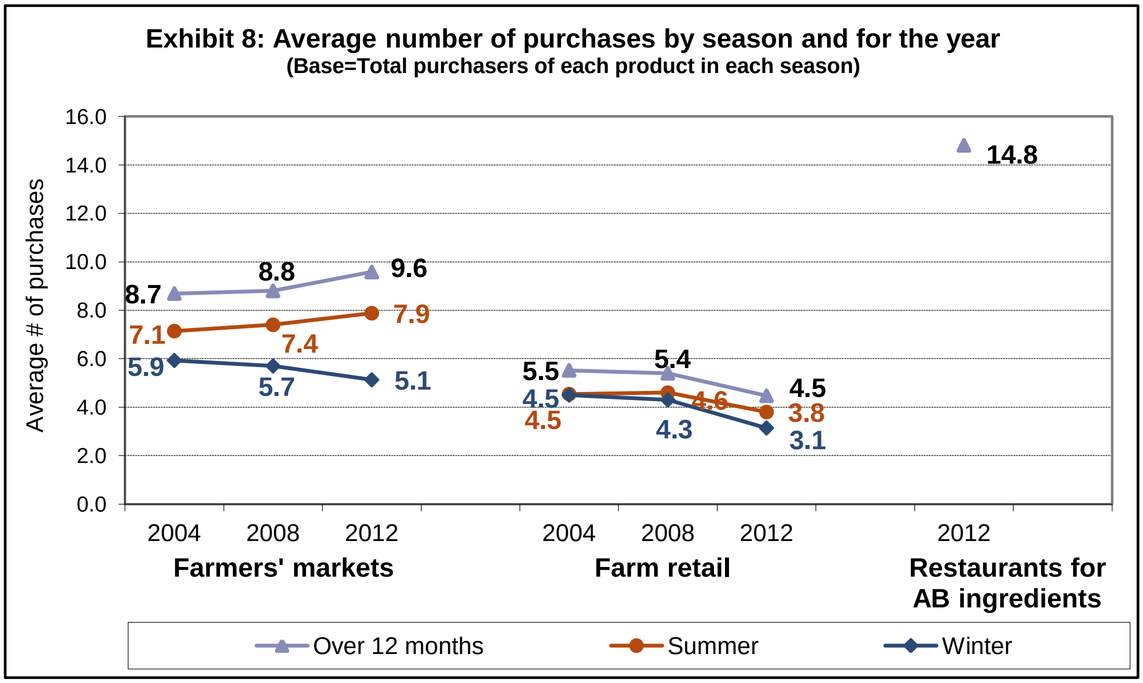
From Exhibit 8 it may be seen that:

- More frequent visits were made to farmers' markets than for farm retail, but the highest frequency was found for restaurants chosen for Alberta ingredients.
- The number of visits made in the two six-month seasons is diverging more strongly than before, particularly for farmers' markets where an average of eight summer visits were made compared to five winter visits (previously seven to six).

  This result also shows increased summer frequency and decreased winter visits to farmers' markets, after being stable from 2004 to 2008. The annual total increased too.

  For farm retail, both seasons individually and the annual total number of visits decreased quite substantially after being stable from 2004 to 2008.

- Frequency of visits to restaurants in general was reported at an average of 53.3 per year, essentially once per week. This means that restaurants were chosen for their Alberta ingredients about once in every four visits (28%).



Note: The summer and winter averages cannot be added, as people who bought only in one season are not included in the calculation for the other. All purchasers are included in the 12 month average.

Differences in the proportion of purchasing visits made in each season may be seen in Table 5, along with the estimated number of visits made from September 2011 to August 2012.

What is most striking from these numbers is that visits to farmers' markets had increased by three million since 2008, yet the number of visits to farm retail outlets decreased by approximately half a million visits over the same period.

Table 5: Estimated number of purchasing visits by season over a 12 month period

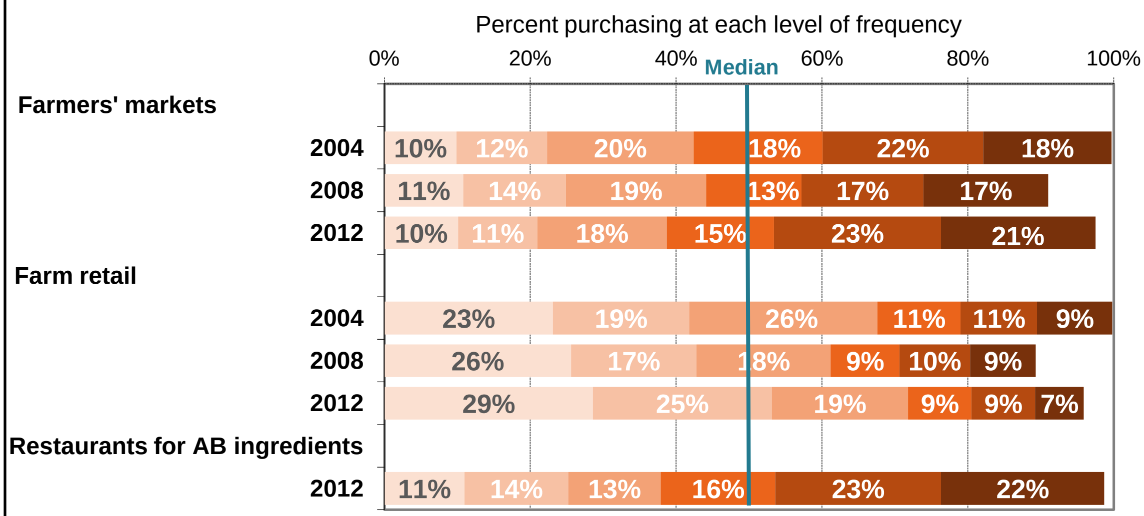
	Estimate			Confidence Interval	
	2004	2008	2012	2012	
	Visits (million)	Visits (million)	Visits (million)	Lower bound (million)	Upper bound (million)
Farmers' market					
Summer (n=580/554/719)*	5.12	6.08	8.18	7.24	9.17
Winter (n=174/151/266)	1.29	1.40	1.98	1.52	2.49
Full Year (n=594/549/734)	6.38	7.43	10.33	9.09	11.64
Farm retail					
Summer (n=314/273/270)	1.76	1.89	1.51	1.12	1.94
Winter (n=101/58/67)	.56	.43	.32	.18	.50
Full Year (n=341/276/277)	2.33	2.32	1.86	1.37	2.41
Restaurants for Alberta ingredients					
Full Year (n=n.a./n.a./231)	-	-	4.96	3.32	6.89

* Bases are for 2004, 2008 and 2012 respectively

Note: Seasonal figures may not add to exactly the same number as annual figures.
Figures may not add due to rounding.

Averages, such as those shown in Exhibit 8, do not tell the full story. A small number of households that make frequent purchases can result in a mean that is significantly higher than the median (the point at which half the population purchase more, and half purchase less). Exhibit 9 shows the distribution of the number of purchases made over the 12 month period for each channel.

Exhibit 9: Number of purchases made in the past twelve months
(Base=Total purchasers of each product)



*Blank spaces in the graph represent responses with incomplete information (e.g., "don't know").

Several trends can be seen from this graph.

- Farmers' market purchasers tend to be regular shoppers; relatively few went only once or twice in the year. Most visited more often than once a quarter, with one in five going more often than once a month. The proportion visiting more often than once every two months increased over the previous measurement periods suggesting that more frequent visits were a factor in increased spending at farmers' markets.
- The majority of farm retail purchasers made between one and two purchases, i.e., six monthly or less often. This represents a significant decrease in frequency. Furthermore, the proportion visiting frequently decreased, exacerbating the problem and suggesting another reason for the decline in this channel.
- Restaurants chosen for their use of Alberta ingredients were visited by 45% every month or two while only 25% were occasional visitors (once or twice a year).

PER VISIT EXPENDITURES

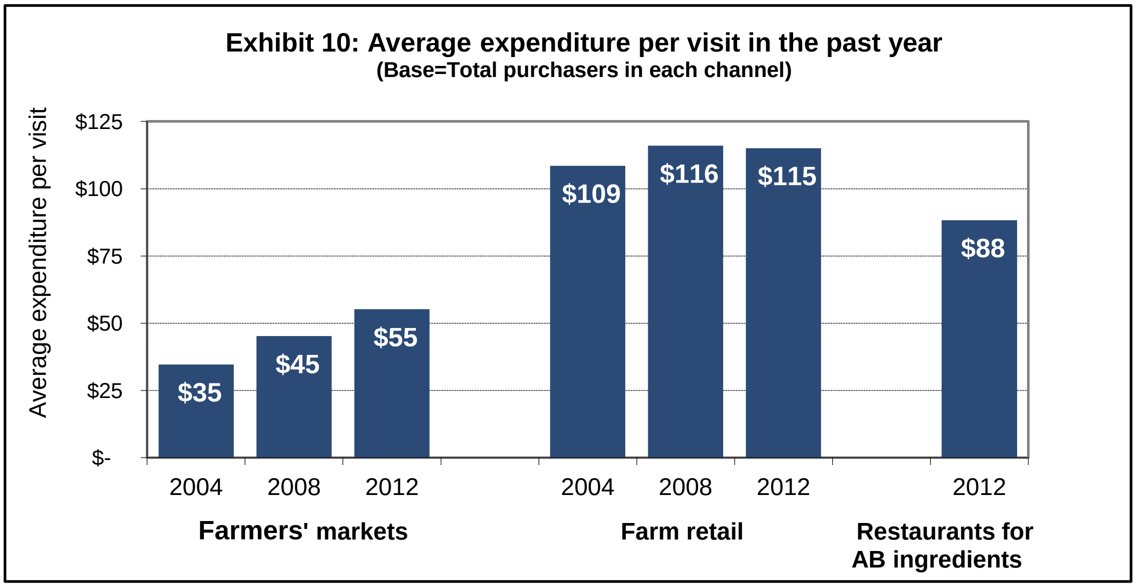


Exhibit 10 shows that per visit spending has increased steadily for farmers' markets since 2004. The expenditure increase of 22% over the past four years well exceeds the provincial rate of inflation for food.[5]

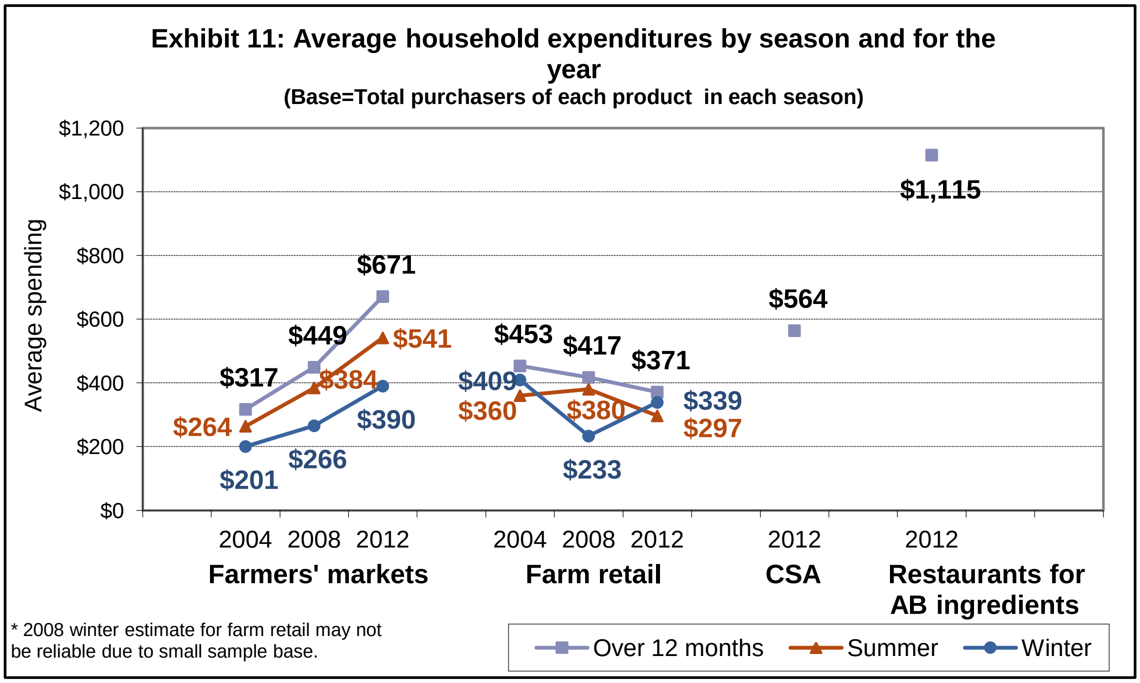
However, farm retail reached a plateau and even declined slightly (-1%), which when taken together with inflation, again demonstrates that this channel is experiencing difficulties.

Average spending of $88 per visit to a restaurant chosen because it serves food prepared from Alberta ingredients was 46% higher than average for all restaurants ($61), suggesting that these restaurants charge a price premium.

5. Food +9.8%. *Consumer Price Index for Alberta*, September 2008 to September 2012.

ANNUAL HOUSEHOLD EXPENDITURES

Average total expenditures over the past 12 months by purchasing households may be seen in Exhibit 11. These figures show the combined impact that increased per visit expenditures and changes in the number of visits had on spending.



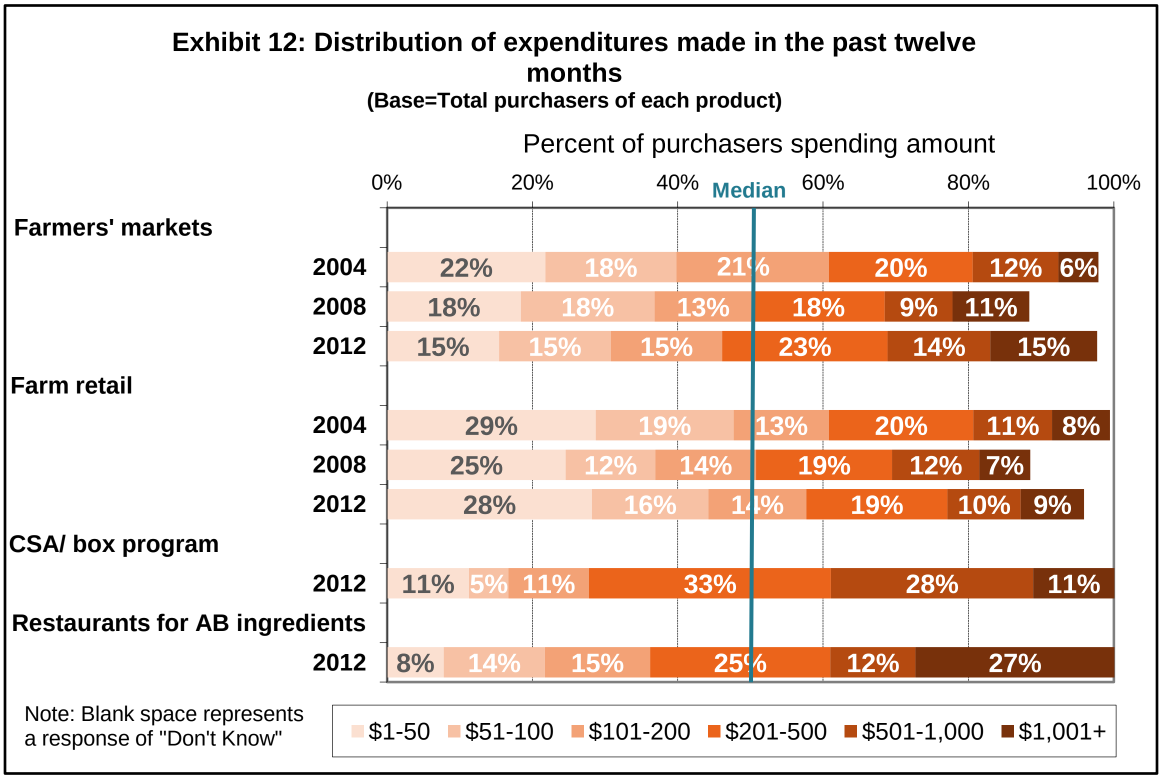
Note: The summer and winter averages are not additive, as people who bought only in one season are not included in the calculation for the other. However, they are included in the 12 month average.

Annual household expenditures rose even more in the last survey wave for farmers' markets than before (49% from 2008 to 2012 vs. 42% from 2004 to 2008), reaching $671 per household.

However, the overall value of farm retail purchases continued to drop at an ever increasing rate (-11% 2012/2008 vs. -8% 2008/2004). Expenditures were lower in 2012 than in 2004 in both seasons.

Household spending on CSA/box programs is substantial, averaging $564 for the 17 program participants. Of the two new markets, restaurants chosen for serving Alberta ingredients were not only far more popular, but once in the market, annual household spending at $1,115 was higher than for any of the other channels.

As with purchase frequency, averages hide wide variation in spending. The distribution of estimated per household annual expenditures for each channel is shown in Exhibit 12.



This graph indicates that:

- A substantial proportion of respondents using farmers' markets, CSA/box programs and restaurants made expenditures at the high end of the scale, over $500, with more than a quarter spending over $1,000 on restaurants chosen for Alberta ingredients;
- Farm retail had a higher proportion of light spenders than the other channels (particularly under $50), as well as a lower median.

CURRENT MARKET VALUE

The findings in this section take into account the combination of the number of purchasers, the number of times they purchased from each channel each season and how much they spent on the last purchase in the season. Annual expenditures were calculated for each respondent in the survey (i.e., creating a case based estimate of expenditures) and then projected to the population of households in the province.

This provides an estimate of the value of each market for the 12 month period, September 2011 to August 2012. The estimates are shown in Table 6, split by season. Farmers markets were valued at $724 million, farm retail at $154 million and restaurants chosen for Alberta ingredients at $374 million.

Table 6: Estimated market value by season over a 12 month period

	Estimate			Confidence Interval	
	2004	2008	2012	2012	
	Value ($million)	Value ($million)	Value ($million)	Lower bound ($million)	Upper bound ($million)
Farmers' market					
Summer (n=569/539/719)*	189.2	315.2	561.6	456.4	673.9
Winter (n=173/143/266)	43.4	65.5	150.4	95.6	214.5
Full Year (n=583/533/734)	232.9	380.2	724.0	586.6	870.4
Farm retail					
Summer (n=312/268/270)	139.4	156.7	117.4	84.6	154.9
Winter (n=101/57/67)	50.9	23.2	34.1	16.3	57.8
Full Year (n=339/270/277)	191.1	180.7	154.3	111.1	203.6
CSA/box program					
Full Year (n=-/-/17)	-	-	**	**	**
Restaurants for Alberta ingredients					
Full Year (n=-/-/231)	-	-	373.9	252.8	515.4

* Bases are for 2004, 2008 and 2012 respectively.
** Base too small to estimate reliably.
Note: Seasonal figures may not add to the same number as annual figures.
Figures may not add due to rounding.

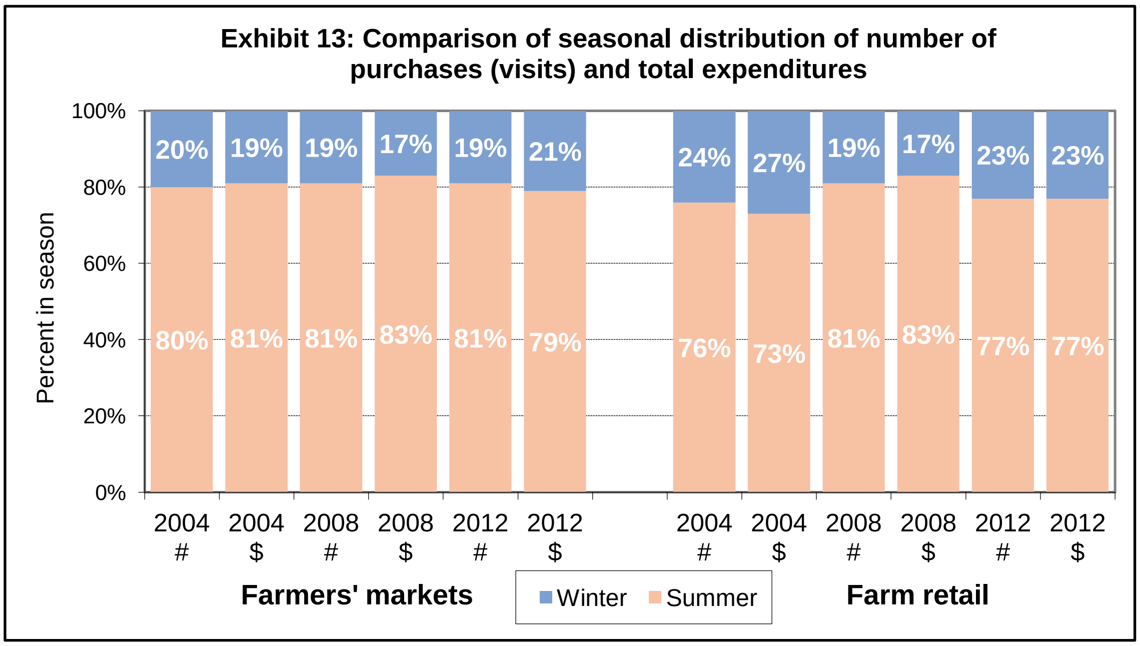
The value of farmers' markets has increased by $343.8 million since 2008, a 90% increase. It is now worth three times as much as in 2004.

The farm retail market continued to decline in value, with the current market estimated to be worth $36.8 million less than in 2004, a 19% loss since tracking began.

Expenditures at restaurants chosen for including Alberta ingredients in the menu proved to be quite substantial at $373.9 million. It was particularly interesting that 9.5% of reported expenditures at all restaurants were influenced by serving food made from Alberta ingredients, compared to 6.4% of all restaurant visits. The comparison again points to the existence of a price premium for these restaurants.

SEASONAL DISTRIBUTION OF PURCHASES AND EXPENDITURES

The vast majority of visits and expenditures occurred in the six month summer period. Exhibit 13 shows the comparison for all tracked years. The percentages are based on figures shown in Tables 5 and 6.



The seasonal distribution of expenditures on farmers' markets in 2012 reversed direction over 2008 with lower value being generated by summer sales than suggested by the number of visits made (or vice versa, that winter sales generated a higher proportion of expenditures than anticipated by the season's proportion of visits).

The loss of winter visits and sales for farm retail in winter 2008 reverted to proportions closer to those found in 2004. In 2012 the proportion was well balanced with 23% of both visits and sales occurring in winter.

PROJECTED MARKET VALUE

Farmers' market and farm retail

Table 7 presents figures relating to the projected value of the market in the next 12 months. It includes: the value of purchases that may be made by households not currently in the market,[6] the value of purchases made in the past year, the change in the value of purchases anticipated by current purchasers in the next year, the total estimated value in the next year and the percent change this represents over the previous 12 months.

, 7: Estimated growth in market value in the next year

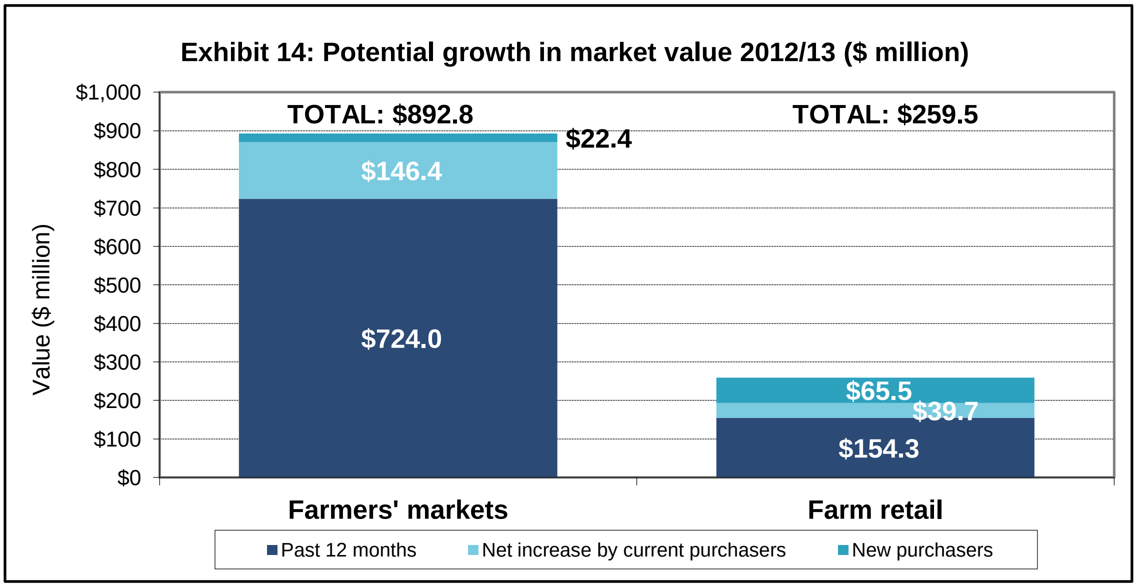
	Estimate ($million)			Confidence Interval 2012	
	2004	2008	2012	Lower bound ($million)	Upper bound ($million)
Farmers' markets					
Value of purchases by new households interested in purchasing in next year (n=94/50/61)*	26.1	22.6	22.4	13.4	33.6
Value of purchases in the past year (n=583/533/734)	232.9	380.2	724.0	586.6	870.4
Change in value of purchases by current purchasers in next year (n=579/521/713)	30.4	87.0	146.4	99.5	196.7
PROJECTED MARKET VALUE IN 12 MONTHS	**289.4**	**489.9**	**892.8**	**699.5**	**1,100.7**
Projected rate of growth in the next 12 months %**	24.3%	28.8%	23.3%	19.3%	26.5%
Farm retail					
Value of purchases by new households interested in purchasing in next year (n=78/79/93)	52.3	64.2	65.5	42.8	93.0
Value of purchases in the past year (n=339/270/277)	191.1	180.7	154.3	111.1	203.6
Change in value of purchases by current purchasers in next year (n=333/273/278)	25.5	47.5	39.7	9.0	76.3
PROJECTED MARKET VALUE IN 12 MONTHS	**268.9**	**292.4**	**259.5**	**163.0**	**372.9**
Projected rate of growth in the next 12 months %**	40.7%	61.8%	68.2	46.6	83.2

* Bases are for 2004, 2008 and 2012 respectively.

** Based on consumers' stated expectations (i.e., not projections based on purchasing data or trends).

6. Computed by multiplying the weighted annual average per visit expenditure of all current purchasers by the number of visits respondents whose chance of purchasing was 6/10 or higher expect to make.

Exhibit 14 summarizes the data graphically.

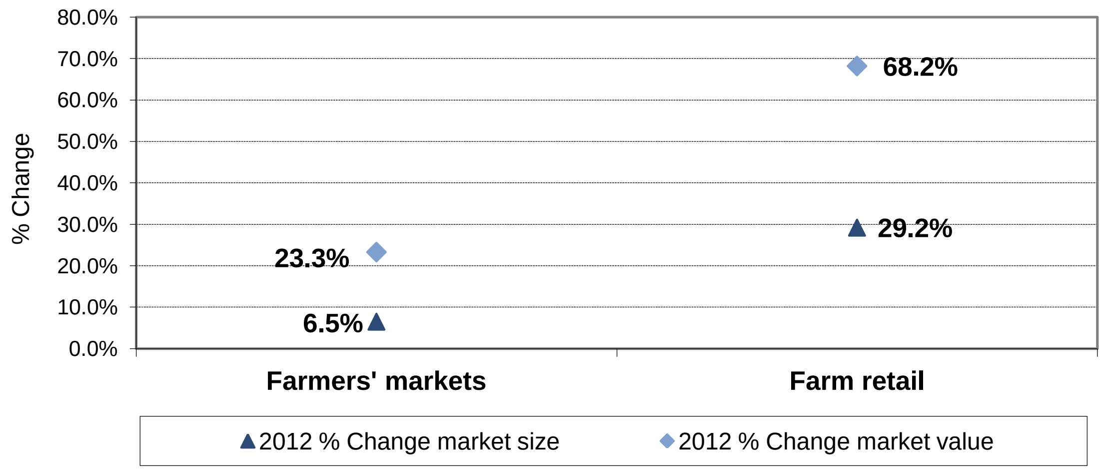


Observations which may be made about these figures are that:

- Both alternative agricultural markets appear to be set to grow in value.
- The major growth in spending at farmers' markets will come from increased spending by existing purchasers. This finding again suggests that the channel is close to full market penetration (i.e., number of purchasers) and that existing customers should be the primary marketing focus. Nevertheless, channel revenues are expected to increase substantially.
- Both new purchasers and existing participants will increase the value of the farm retail market, with potential new purchasers offering a somewhat stronger growth opportunity.
- Farm retail continues to appear to be poised to grow most substantially percentagewise. In the past these expectations have not been met (unless the market yo-yos substantially year to year), so the reasons why growth has been inhibited should be explored and addressed.

Comparison of the projected rate of growth for market size and market value in Exhibit 15 demonstrates that more growth is likely to occur from an increase in the value of purchases than from an increase in market size (i.e., the number of purchasing households) for both channels, most noticeably for farm retail.

Exhibit 15: Comparison of estimated growth rates for market size (purchasing households) and market value (annual expenditures)



These findings imply that purchase frequency and/or per purchase spending is probably on the rise. Two questions asked of current purchasers provided data relating to likely changes in purchase behaviour. They were:

- "In the next 12 months, do you expect that you and members of your household will spend more, less or the same as last year, on … (channel)?"
- "Will that be because you will go … (more/less) often, or because you'll spend … (more/less) per visit, or both?"

The responses to these questions are shown in Exhibits 16 and 17. Approximately two-thirds of current purchasers do not expect to change their purchasing behaviour. This proportion was stable in 2012 after showing a marked decline in 2008 from the 75% level measured in 2004.

Among purchasers likely to change, higher spending is expected for farmers' markets and farm retail. Few expect to spend less on food through these channels.

Exhibit 17 shows that the total increase in spending by current purchasers is likely to come more from additional purchases (visits) for farmers' markets and farm retail than by spending more per purchase.

Where purchasers thought they would spend less, this was also because they expected to use the channel less often, rather than to reduce the value of their purchases.

Exhibit 16: Expected changes in spending by current purchasers
(Base=Total purchasers of each product)

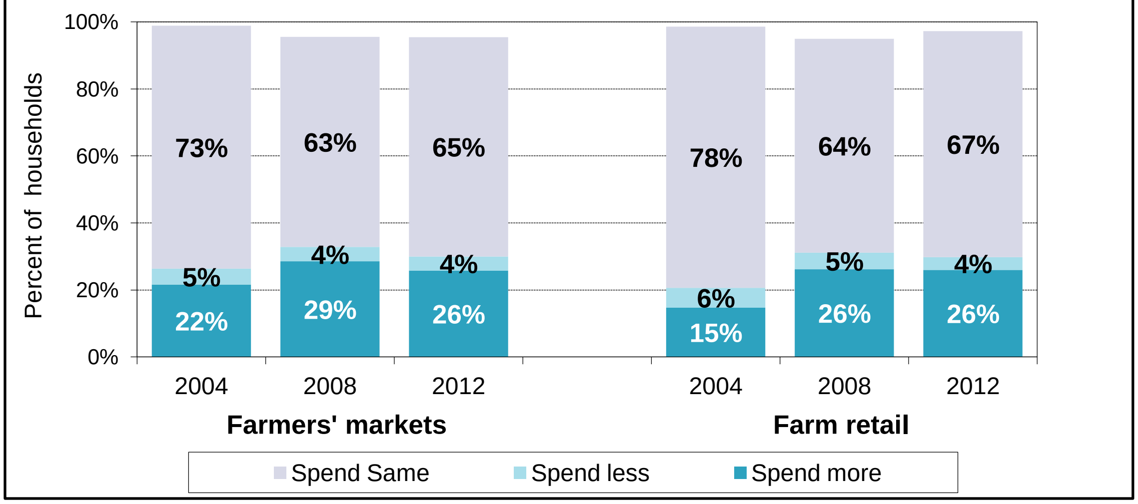
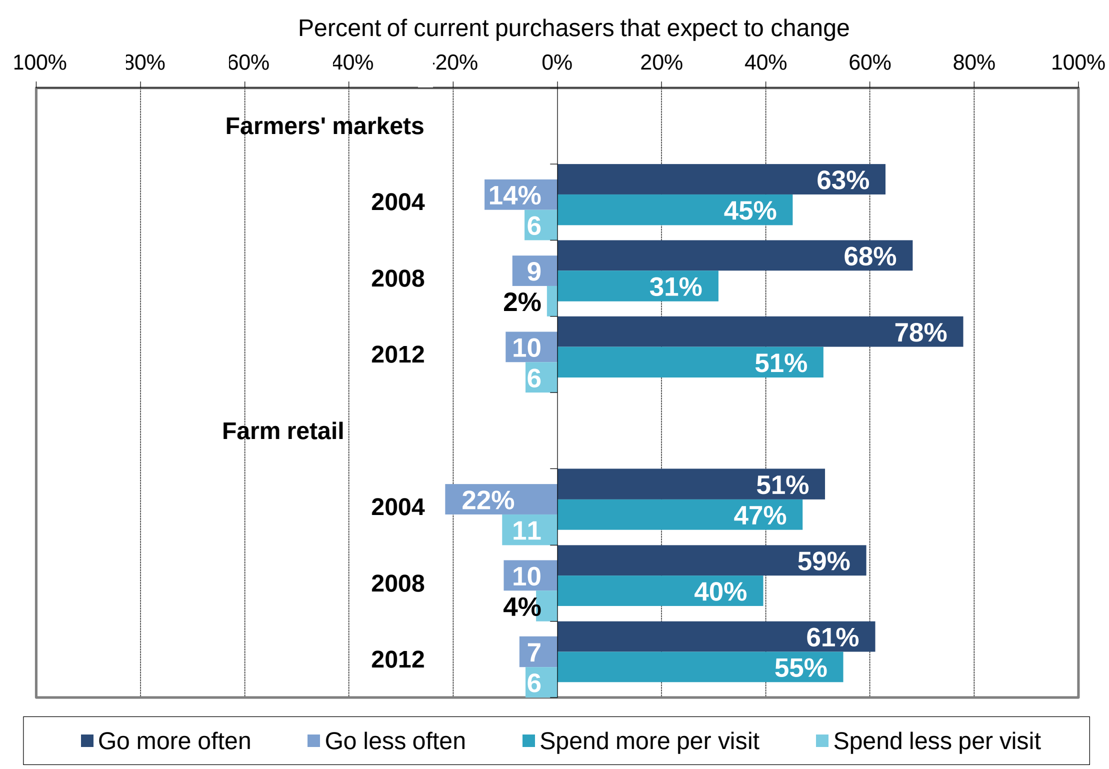


Exhibit 17: Whether anticipate changing number of visits or changing spending per visit
(Base=Current purchasers expecting to change)



In all, this means that growth in total expenditures among current purchasers will primarily be the result of changes in purchase frequency, both in terms of increasing expenditures and decreasing expenditures.

Prevention of loss from existing purchasers will depend more on keeping them in the market or preventing erosion of purchase frequency, than on addressing lower spending on each purchasing occasion.

Similar questions were not asked for restaurants.

CSA/box programs

CSA/box program purchasers were asked whether they would continue to subscribe next year. Of the 17 subscribers, 10 said they would, suggesting that there may be a substantial attrition rate.

Although the programs that were being subscribed to included a mix of for profit, including home delivery services (10 – The Organic Box, Edmonton; Farm Fresh Organics and SPUD, Calgary) and not-for profit services (5 – Good Food Box Programs, Calgary and Whitecourt; Wecan, Edmonton), there were no significant differences by type of service in the proportion planning not to renew their subscription.

Non-subscribers of CSA/box programs were asked to rate the chances that they would become subscribers in the next 12 months. Although 48% rated their interest at 0 out of 10 (no chance), a quite substantial 11% of non-purchasers who had heard of the channel provided a positive rating of 6 or higher out of 10. In view of the high proportion who had never heard of CSA/box programs (and would therefore not consider subscribing), when those interested are calculated as a proportion of all households, the rate dropped to 6%. Nevertheless, this was three times the current rate of purchase, so growth potential does exist. For the channel to develop significantly, however, much more would need to be done to raise awareness of its existence, how it operates and what benefits are offered.

4. Market profiles

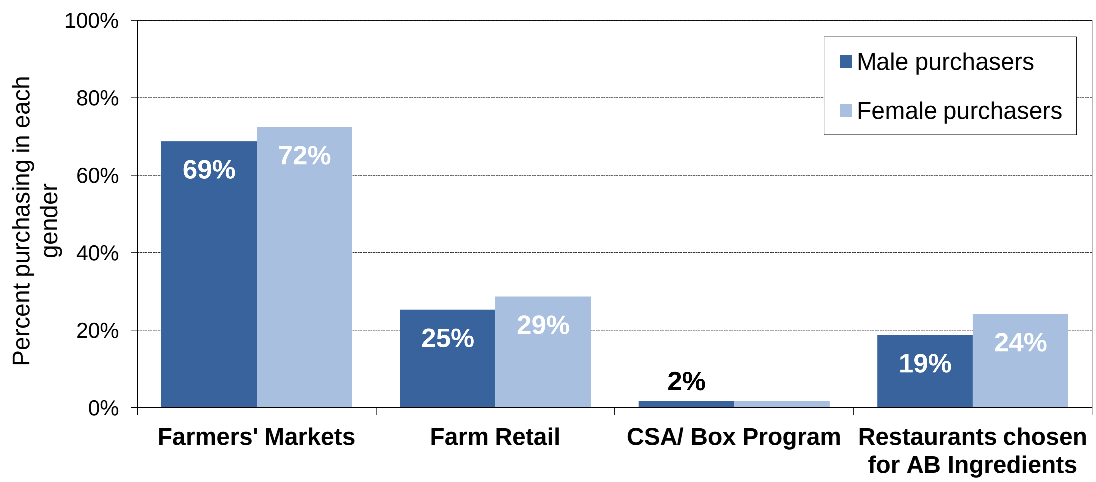
Demographic and geographic purchaser profiles

Demographics can be divided into three broad groups: gender, social characteristics and economic characteristics. Each is discussed separately below.

Gender

Exhibit 18 shows that there were no statistically significant differences between men and women reporting use of the alternative market channels, although slightly more females reported buying. This is to be expected, since both genders described household purchasing behaviour.

Exhibit 18: Market penetration by gender (2012)
(Base = Total in each gender)



Note: Exhibits 18 to 24 show the the proportion of respondents in each demographic group who purchased from each source. The primary comparison is between the demographic groups *within the market*. For example, 69% of males bought from farmers' markets compared to 72% of females.

However, when all alternative markets are taken together, females were more likely than males to purchase from at least one (81% vs. 75%).

Social characteristics

Social characteristics measured in the survey included age, marital status, household size, presence of children and age of the youngest child. Combined, these social measures provide a description of household lifestage. Purchasers in each market are profiled on these characteristics in Exhibits 19 to 21.

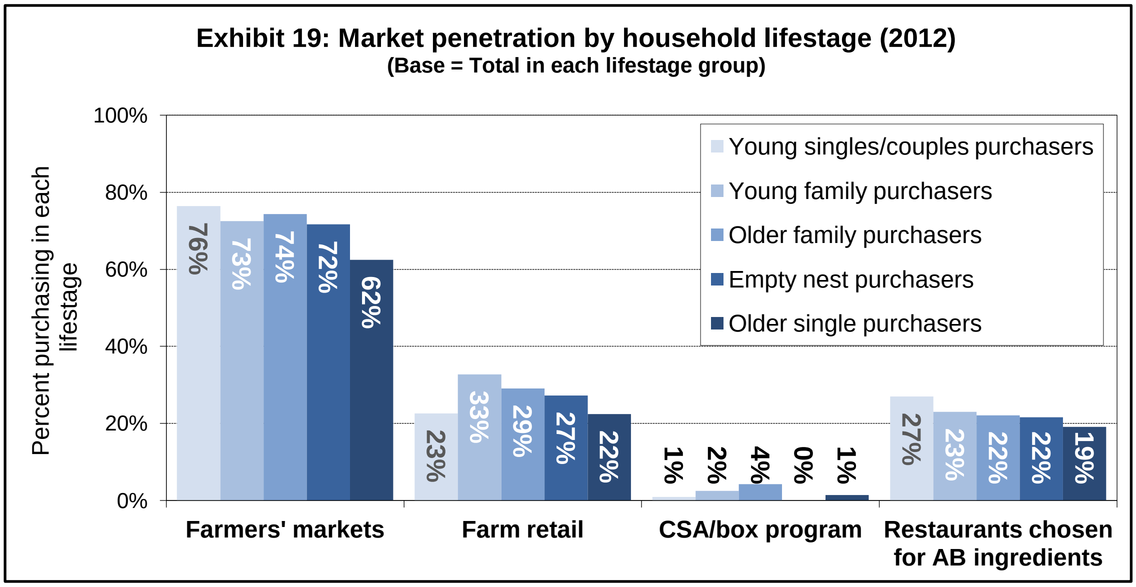


Exhibit 19: Market penetration by household lifestage (2012)
(Base = Total in each lifestage group)
Percent purchasing in each lifestage
100%
80%
60%
40%
20%
0%
Young singles/couples purchasers
Young family purchasers
Older family purchasers
Empty nest purchasers
Older single purchasers
76%
73%
74%
72%
62%
23%
33%
29%
27%
22%
1%
2%
4%
0%
1%
27%
23%
22%
22%
19%
Farmers' markets
Farm retail
CSA/box program
Restaurants chosen for AB ingredients

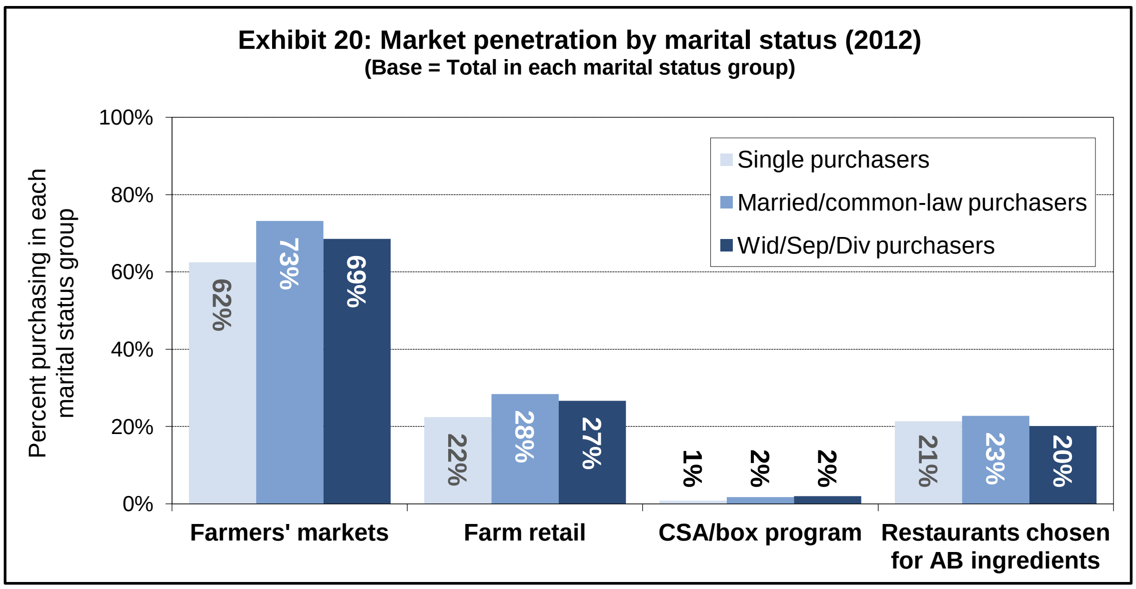


Exhibit 20: Market penetration by marital status (2012)
(Base = Total in each marital status group)
Percent purchasing in each marital status group
100%
80%
60%
40%
20%
0%
Single purchasers
Married/common-law purchasers
Wid/Sep/Div purchasers
62%
73%
69%
22%
28%
27%
1%
2%
2%
21%
23%
20%
Farmers' markets
Farm retail
CSA/box program
Restaurants chosen for AB ingredients

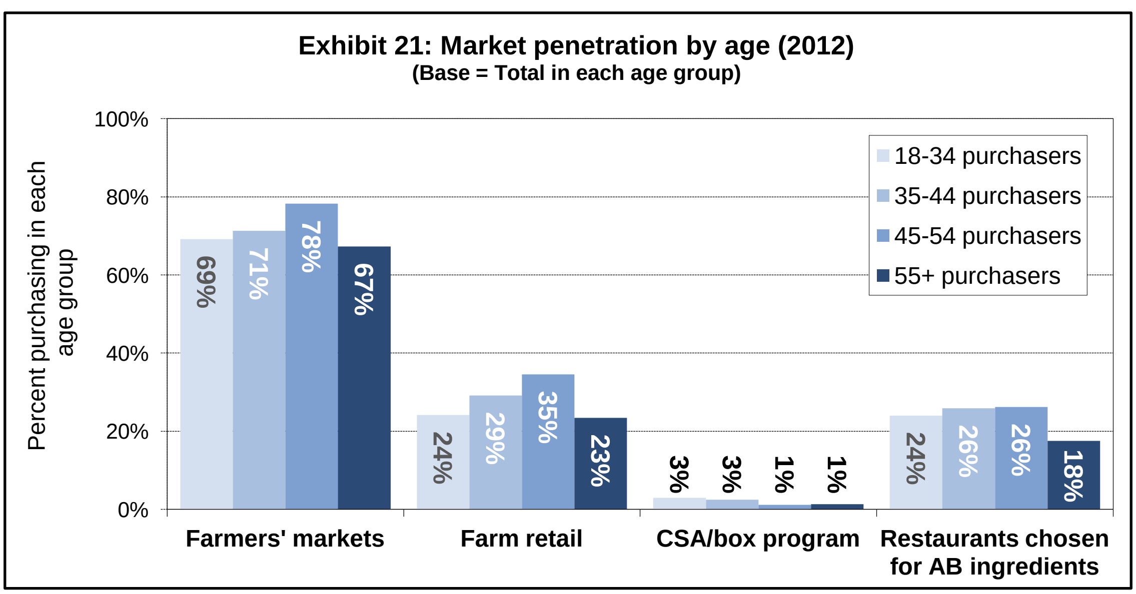


Exhibit 21: Market penetration by age (2012)
(Base = Total in each age group)
Percent purchasing in each age group
100%
80%
60%
40%
20%
0%
18-34 purchasers
35-44 purchasers
45-54 purchasers
55+ purchasers
69%
71%
78%
67%
24%
29%
35%
23%
3%
3%
1%
1%
24%
26%
26%
18%
Farmers' markets
Farm retail
CSA/box program
Restaurants chosen for AB ingredients

Overall, users of at least one alternative market were less likely to be in the older single lifestage, but more likely to be aged 45-54 with older families (teen or older children) or empty nests and married/living as a couple. The 45-54 year old group also used the most diverse range of alternative markets.

In 2012 farmers' market purchasers were found less often among older singles, but more or less equally in the other lifestages. This was a change from previous survey waves where empty nesters were most prevalent, and leads to the conclusion that market penetration increased by diversifying the groups attracted to buy. Farmers' market users continued to be found more often among 45-55 year olds and in married/couple households.

Farm retail purchasers maintained a very different pattern, being used most often by young families (with the youngest children being pre-school or elementary school age) and the 35-44 age group. They were used least often by young singles/couples and 18-34 year olds.

CSA/box program purchaser profiles are shown for the record, but with so few users there were no defining social characteristics. Directional results suggest that younger respondents (up to age 44) and older families (with teen or older children) may have been more likely to use the program.

Restaurants were less likely to be chosen for using Alberta ingredients by 55+ year olds. While not significant, there are indications that this channel appealed less and less as lifestage progressed.

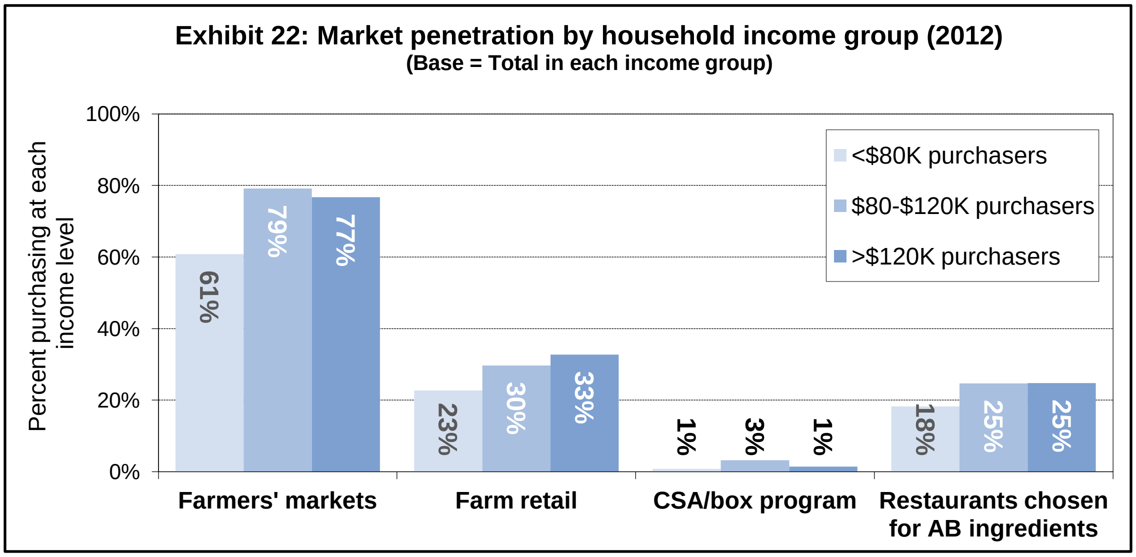
Economic characteristics

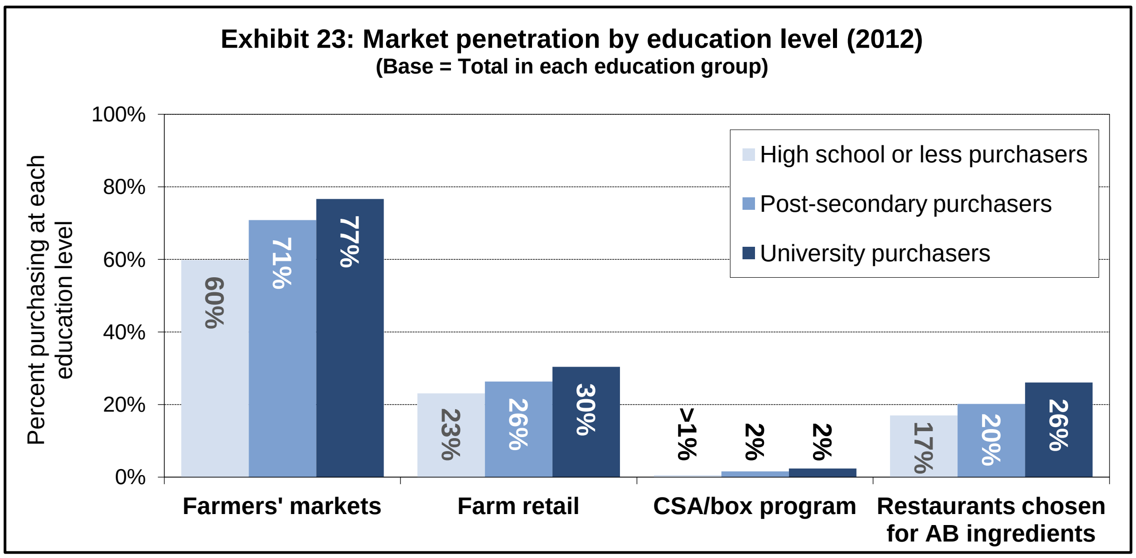
Economic characteristics measured in the survey included household income and respondent education. Purchasers in each market are profiled on these characteristics in Exhibits 22 and 23.

Respondents who were users of any alternative market were overrepresented in the two higher education (post-secondary or university) and household income (over $80,000 in 2011) groups. This suggests that affordability is one criterion for use.

A similar pattern was found for farmers' market users, who dominate the sector as a whole. This pattern again points to a broadening of the user base, since in 2008 farmers' market users were mainly distinguished by being in the highest income group.

Farm retail users were significantly less likely to be in the lowest income group while households choosing restaurants for serving Alberta ingredients were overrepresented in the highest education segment (with a university degree).





Geographic location

Exhibit 24 examines market penetration for each channel by community size and geographic location.

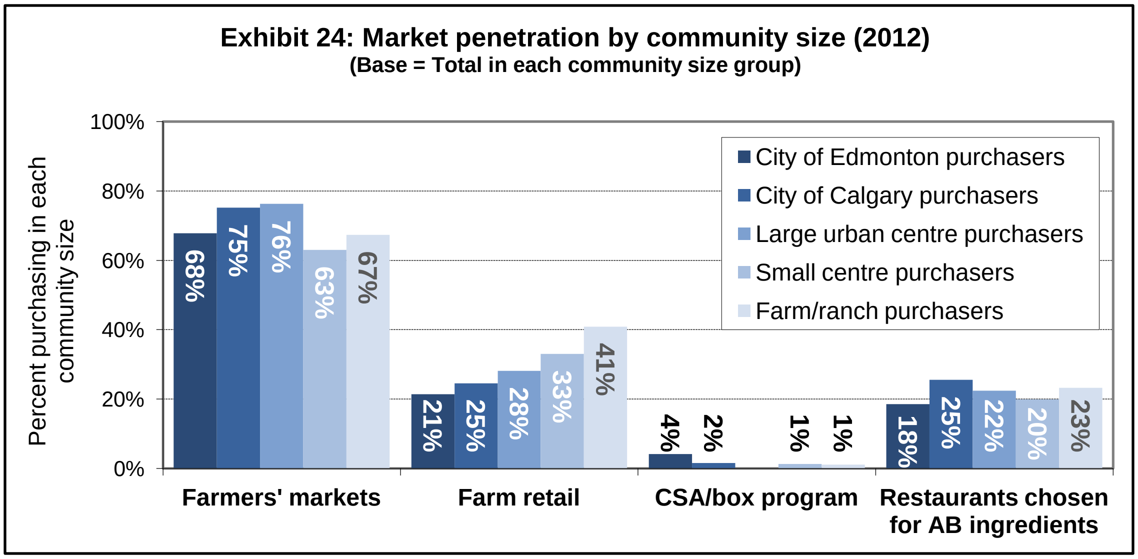
Residents of larger urban centres (i.e., with a population of 10,000 or more) were somewhat more likely to use at least one of the alternative channels than households elsewhere in Alberta.

Farmers' markets proved to be most popular in the City of Calgary and larger urban centres and were less well supported in small centres (towns, villages and hamlets under 10,000 population).

The profile of farm retail users was quite different. Increasing market penetration was found with decreasing population size. In particular, farm retail was most popular among people living on farms/ranches themselves, followed by those living in small centres.

CSA/box program users were most likely to be found in the City of Edmonton.

Households choosing restaurants for their use of Alberta ingredients were found proportionately more often in the Calgary CMA.



Greater detail is shown in Appendix II, where the market for each channel is profiled. Rather than describing incidence of use, as discussed above, it shows what proportion of all users fell into each demographic or geographic group. The distributions obtained in 2004 and 2008 are also shown in the appended table. However, when making comparisons between the years, differences in overall sample make-up should be considered.

SEASONAL PROFILES

Geographic location proved to be somewhat more important than demographic factors in profiling differences between purchasers in various seasons, as follows:

- For farmers' markets, residents of the major urban centres (Fort McMurray, Grande Prairie, Lethbridge, Medicine Hat and Red Deer) and older households (empty nesters and older singles, and people aged 55+) were especially likely to be summer-only purchasers. City of Edmonton and City of Calgary households were more likely to buy year-round, as were purchasers with a university degree.
- Farmers/ranchers bought farm retail more often in both seasons.
- Households using three or four alternative markets were far more likely to purchase at farmers' markets year round, but to purchase farm retail only in summer.

DEGREE OF USE PROFILES

It is sometimes helpful when defining target markets to focus on those households that provide the highest yield. For example, the top farm retail spenders had annual expenditures averaging $1,323 per household (termed heavy spenders), vs. $263 for medium and $48 for light spenders. Clearly, a heavy spender is worth more to the channel than a medium or light spender.

Three different Degree of Use groups were defined for each alternative market, each with three levels. They were based on: number of purchases in the past year (i.e., visits during which at least one item was purchased); the amount spent on the last purchase (using a weighted average where seasonal information was provided); and total expenditures in the past year (a combination of number of purchases and value of the last purchase/s). The three levels defined and the bases obtained are shown in Appendix III. In each case, the "high" or "heavy" level was designed to include approximately the top 20% of purchasers.

A comparison of the profiles of households associated with the Degree of Use groups yielded a number of differences of note for each channel.

Farmers' markets

- Higher expenditures, both on the last purchase and for the year, were found increasingly with increase in household size, and more often in the Calgary CMA. Heavier spending was associated with university education.

  In contrast, light spenders had smaller than average households, frequently without children, were more often aged 55 years and older, overrepresented among older singles and people who had never married and were more likely to live in larger urban centres. They also tended to have a below average household income.
- Higher frequency of visits and expenditures was, understandably, linked to higher familiarity. Familiarity increased with increase in the number of channels used.
- High annual expenditures were more likely to occur when the respondent had [also] shopped at a farmers' market while on a pleasure trip elsewhere in Alberta.
- Low or light purchasers were more likely to visit only in summer, while frequent purchasers and heavy annual spenders visited farmers' markets in both seasons.
- Frequency of purchase was more important than amount spent at each visit in contributing to greater annual expenditures.
- Annual expenditures averaged $2,534 for heavy spenders, $390 for medium and $73 for light spenders.

- Low frequency purchasers were more likely to feel they would change their purchase pattern in the next year, being especially likely to feel they will go more often (an average gain of 1.5 visits). High spenders expecting a change thought they would spend even more, which could net an additional average contribution three times higher than the average for all purchasing households ($338 vs. $136).

Farm retail

- Families of all ages spent more on farm retail while older singles spent less. Age differences were in line with these trends, with higher spending in the 35-54 age groups and lower among 55+ year olds. On a geographic basis, Edmonton area households spent less than elsewhere in the province, especially in the City itself.
- Lower frequency of visits and expenditures was linked to lower familiarity, while farm/ranch residents were most familiar with the channel. Familiarity increased with increase in the number of channels used.
- Low or light purchasers were much more likely to visit only in summer, while over half of all frequent purchasers and heavy annual spenders made farm retail purchases in both seasons.
- Annual expenditures averaged $1,323 for heavy spenders, $263 for medium and $48 for light spenders.

Restaurants chosen for Alberta ingredients

- Higher expenditures, both on the last purchase and for the year, were found in empty nester households, while light spenders on restaurants chosen for Alberta ingredients had a below average household income.
- Purchase frequency was highest among farm/ranch families and in rural areas, but average spending per visit was low in rural locations.
- Frequency of purchase was more important than amount spent at each visit in contributing to greater annual expenditures.
- Annual expenditures averaged $4,205 for heavy spenders, $727 for medium and $128 for light spenders.
- There were indications that households that do not cook from scratch may spend more on restaurants chosen for Alberta ingredients than those who do, but the results were not statistically significant.

5. Food grown or made in Alberta

The remaining survey questions dealt with "food grown or made in Alberta" – the definition adopted for this study to represent 'local food' – and associated matters such as the degree of closeness of relationship established with farm/ers.

It should be noted that if the term 'local food' had been used instead, it might have triggered different associations, particularly for questions relating to perceptions. Incorporating the adopted definition into each question ensured clarity and consistency in what was being discussed and avoided issues that might have been created where respondents understood the term differently (e.g., as 100 kilometre food, from the local community, etc.)

Almost all questions in this section are new or were substantially revised in 2012 as the purpose was different (measuring extent) to that in 2008 (understanding behaviour and perceptions).

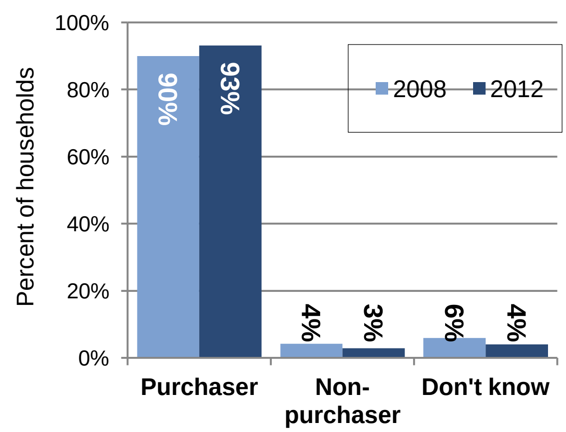
MARKET SIZE

Food grown or made in Alberta was purchased in the past 12 months by 93% of Alberta households, an increase since 2008 (Exhibit 25).

This translates into 1,414,000 purchasing households, compared to 1,279,000 in 2008.

From a marketing perspective, it is interesting that 4% did not know whether they had purchased food grown or made in Alberta or not.

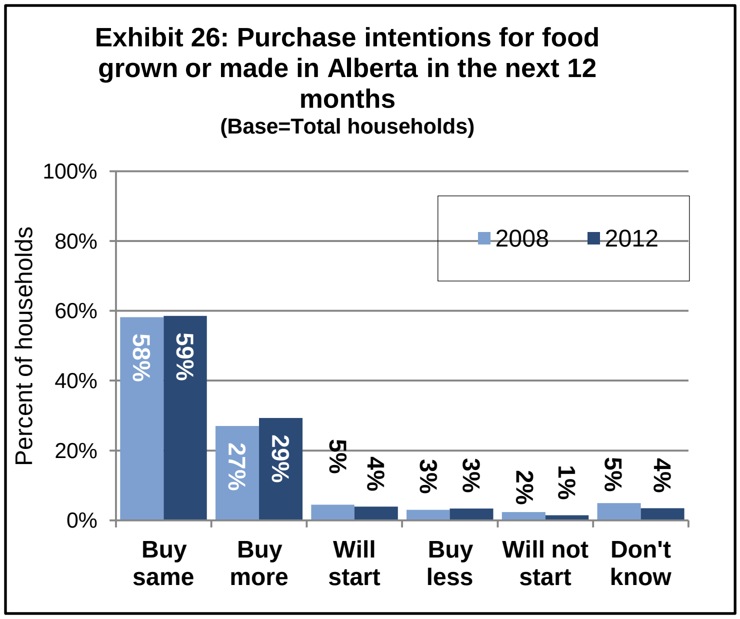
Exhibit 25: Purchase of food grown or made in Alberta in the past 12 months
(Base=Total households)



MARKET GROWTH

Purchasing households were asked whether they expected to buy more, the same amount or less food grown or made in Alberta in the next 12 months. Non-purchasing households (including those who were not sure of their status) were asked whether they intend to buy such food in the next 12 months.

The results are shown in Exhibit 26. The majority of households (60%) did not intend to change the amount that they buy (59% will buy the same and 1% won't start buying). This proportion was the same as in 2008.



Among those who expected to change, the greatest proportion, 29%, expected to buy more than at present while 4% intended to start buying – for a total of one-third who expected to increase consumption.

Only 3% will move in the opposite direction of purchasing less food grown or made in Alberta while 4% did not know what they would do.

The trend clearly remains toward growth.

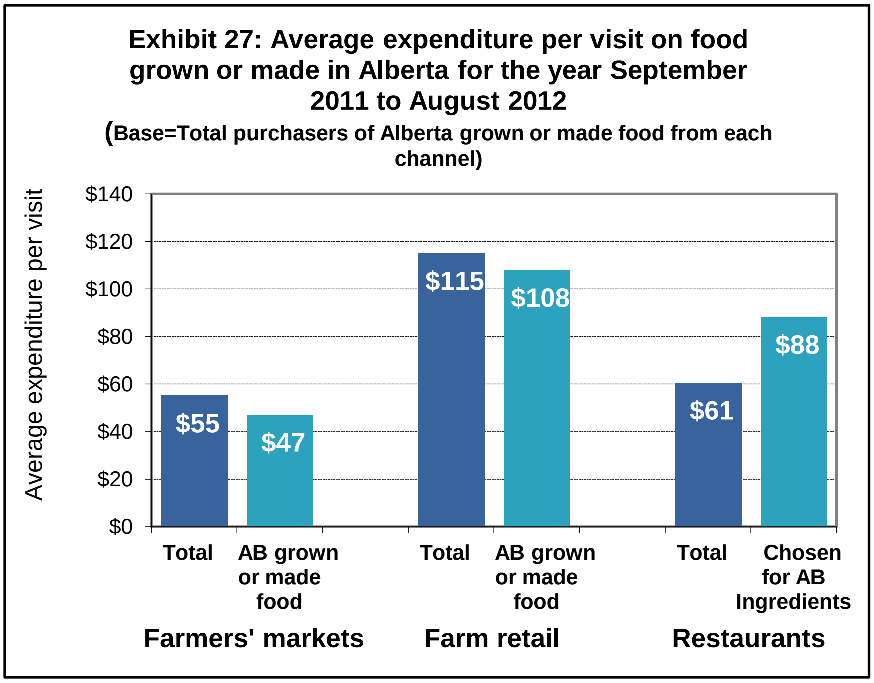
Market Value

Part of the value of the market for Alberta grown or made food was assessed in the survey by asking respondents who had made purchases from the alternative agricultural markets (farmers' markets, farm retail, CSA/box programs) about their spending on food grown or made in Alberta during their last purchase in each season. The question asked was, "How much of this amount was spent on food grown or made in Alberta. Please exclude any food from BC or elsewhere, and any non-food items". For restaurants chosen for use of Alberta ingredients, total spending on the last occasion was requested. In all cases, if the respondent was not sure, s/he was asked to estimate.

Per visit expenditures

The amount that households spent on the average visit during the year September 2011 – August 2012 is shown in Exhibit 27, along with the average amount spent on food grown or made in Alberta.

This graph shows that spending on Alberta food made up the largest portion of sales at farmers' markets (85%) and farm retail (94%). The proportion was 83% and 80% respectively in 2008, suggesting that gains have been made in farm retail.



Results for CSA/box programs were not included in the graph because they are not purchased on a 'per visit' basis.

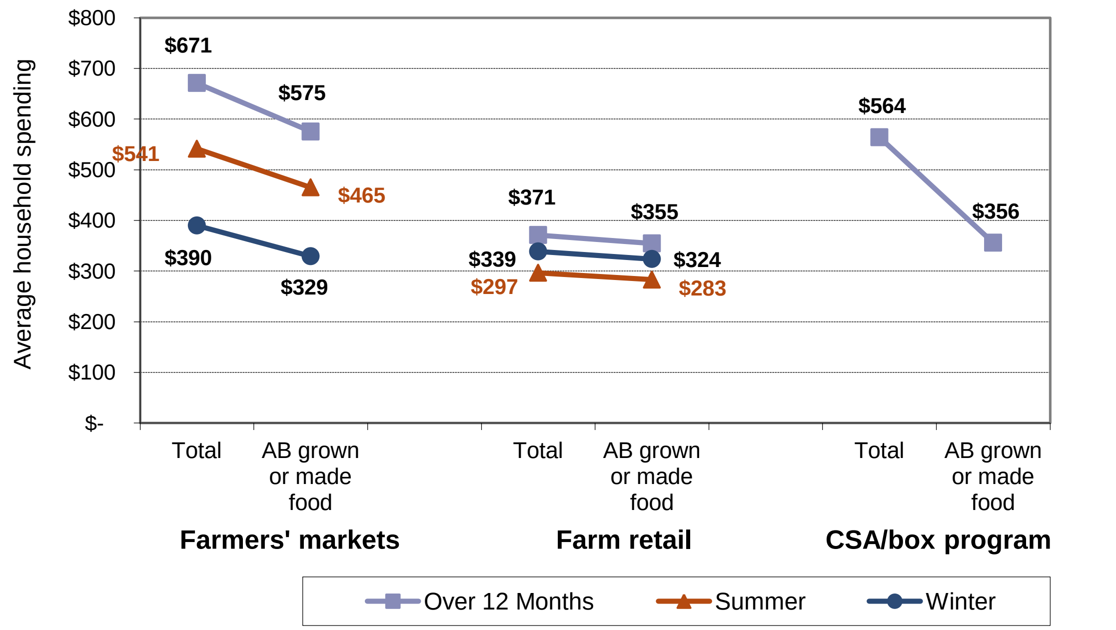
Results for restaurants (where Alberta ingredients were not a subset of a total purchase, but the total of a different purchase) show that per visit spending was higher where the restaurant served food made with Alberta ingredients – generating a premium of 46%.

Annual household expenditures

Average total expenditures over the past 12 months by households purchasing food grown or made in Alberta through these channels may be seen in Exhibit 28. The figures incorporate the impact that the number of visits made had on spending for farmers' market and farm retail. The reported CSA/box program total was assumed to represent one subscription during the year.

At farmers' markets, spending in winter was lower than in summer both in total and for food grown or made in Alberta. On a per household basis, the proportion of the total spent on food grown or made in Alberta was 86%.

Exhibit 28: Average household expenditure on food grown or made in Alberta by season and for the year September 2011 to August 2012
(Base=Total purchasers from each channel)



Note: The summer and winter averages are not additive, as people who bought only in one season are not included in the calculation for the other. However, they are included in the 12 month average.

For farm retail, per household spending in summer was lower than in winter, but the averages were quite similar. The averages for the total value and for spending on food grown or made in Alberta were also similar, with the result that the proportion spent on food grown or made in Alberta was 96%.

Among the small number of CSA/box program purchasers, the amount thought to be spent on food grown or made in Alberta was 63% of the total cost of the subscription, a far lower proportion than for farmers' markets or farm retail.

The results for restaurants were both different and extremely interesting for a number of reasons. Relevant averages are shown in Table 8.

Table 8: Average annual household spending on restaurants September 2011 – August 2012

	Base =Households		
	Total Alberta households (wn=1,000)	Total purchasing from restaurants (wn=957)	Total purchasing from restaurants chosen for Alberta ingredients (wn=221)
Average annual spending per household on all restaurants	$2,597	$2,714	$2,869
Average annual spending per household on restaurants chosen for Alberta ingredients	$244	$255	$1,115
Annual spending on restaurants chosen for Alberta ingredients as a percent of total spending on restaurants	9%	9%	39%

- The average total amount spent per household on restaurants in the past year at $2,597 has a margin of sample error of approximately ±$253 at the 95% level of confidence. In other words, the true number as estimated in this survey can be expected to lie between $2,345 and $2,850.

  In the *2010 Survey of Household Spending*, Statistics Canada reported the average spent by Alberta households on food at restaurants was $2,448. Adding an annual inflation factor of +1.8% per year brings this to a 2012 estimate of $2,537, a figure that is well within the margin of error of the survey estimate and extremely close to the point estimate.[7]

  As the primary purpose of this survey was to estimate the value of markets that have not been or cannot be assessed from the supply side, the accuracy of this finding is most reassuring.
- The average annual household expenditures of $1,115 on restaurants using ingredients grown or made in Alberta reported by purchasers at these restaurants represented a substantial 39% of their total spending. A similar calculation on restaurant visits showed that 28% were to restaurants chosen for Alberta ingredients, once again demonstrating the price premium earned.
- When averaged over all restaurant users, spending on restaurants chosen for Alberta ingredients accounted for 9% of all restaurant expenditures. This comparison is equivalent to those shown in Table 8 above and represents a baseline measure that can be monitored in the future.

While it is not possible to say what proportion of these expenditures were actually made on Alberta ingredients, the impact their use had on choice of restaurant, and the revenue accrued by these restaurants, was clearly not trivial within the total industry.

7. Statistics Canada, CANSIM, table 203-0029 and Catalogue no. 62F0026M. *Survey of Household Spending 2010*.

Current market value

The findings in this section take into account the combination of the number of purchasers, the number of times they purchased from each channel each season and how much they spent on the last purchase in each season. Annual expenditures were calculated for each respondent in the survey (i.e., creating a case based estimate of expenditures) and then projected to the population of households in the province.

This provides an estimate of the value of food grown or made in Alberta by market for the 12 month period, September 2011 to August 2012.

The estimates are shown in Table 9, split by season. Food grown or made in Alberta at farmers' markets was valued at $598.4 million (83% of the total spent there) and farm retail at $143.8 million (93% of the total).[8] Restaurants chosen for Alberta ingredients were valued at $373.9 million (9% of the total).

Table 9: Estimated market value of food grown or made in Alberta by season over a 12 month period

	Estimate		Confidence Interval	
	2008	2012	2012	
	Value ($000,000)	Value ($000,000)	Lower bound ($000,000)	Upper bound ($000,000)
Farmers' markets				
Summer (n=511/717)*	$248.6	$477.2	$382.8	$578.2
Winter (n=136/265)	$55.5	$124.7	$76.4	$181.3
Full Year (n=506/731)	$302.0	$598.4	$478.3	$726.8
Farm retail				
Summer (n=268/269)	$131.7	$109.1	$77.5	$145.5
Winter (n=58/67)	$22.0	$30.7	$14.2	$53.1
Full Year (n=270/276)	$154.5	$143.8	$102.1	$191.7
CSA/box programs				
Full Year (n=-/17)	-	**	**	**
Restaurant chosen for Alberta ingredients				
Full Year (n=-/231)	-	$373.9	$252.8	$515.4

* Bases are for 2008 and 2012 respectively.

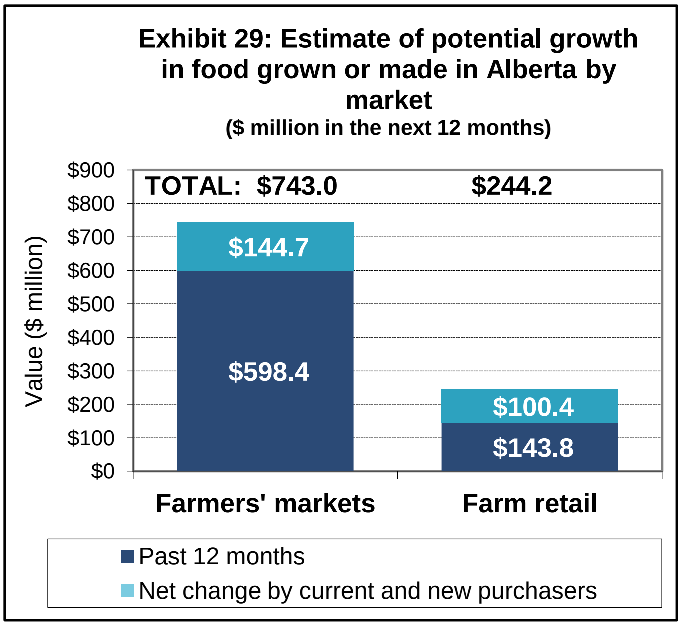
** Base too small to estimate reliably.

Note: Seasonal figures may not add to the same number as annual figures.
Figures may not add due to rounding.

8. Since the data here are expanded to include number of visits and projected to the total population rather than being simply based on averages, the percentage estimate for spending on food grown or made in Alberta as a proportion of total spending, is slightly different than on a per visit basis or a per household basis.

Projected market value

Although the survey did not directly address the amount by which households intend to increase or decrease their consumption of food grown or made in Alberta, a rough estimate was obtained based on the proportion of total expenditures that are made up by Alberta food. The results may be seen in ` and Exhibit 29.



These figures suggest that food grown or made in Alberta sold through farm retail channels could grow proportionately faster than through farmers' markets, with the total value of the increase being over $100 million for both. However, wide variation in the potential value is found in the upper and lower bounds and any change of the magnitude shown for farm retail has to be actualized with marketing or other assistance that addresses reasons why this market has not grown since 2008, despite similar levels of interest (growth potential) at that time.

Table 10: Estimated growth in market value for food grown or made in Alberta in the next year

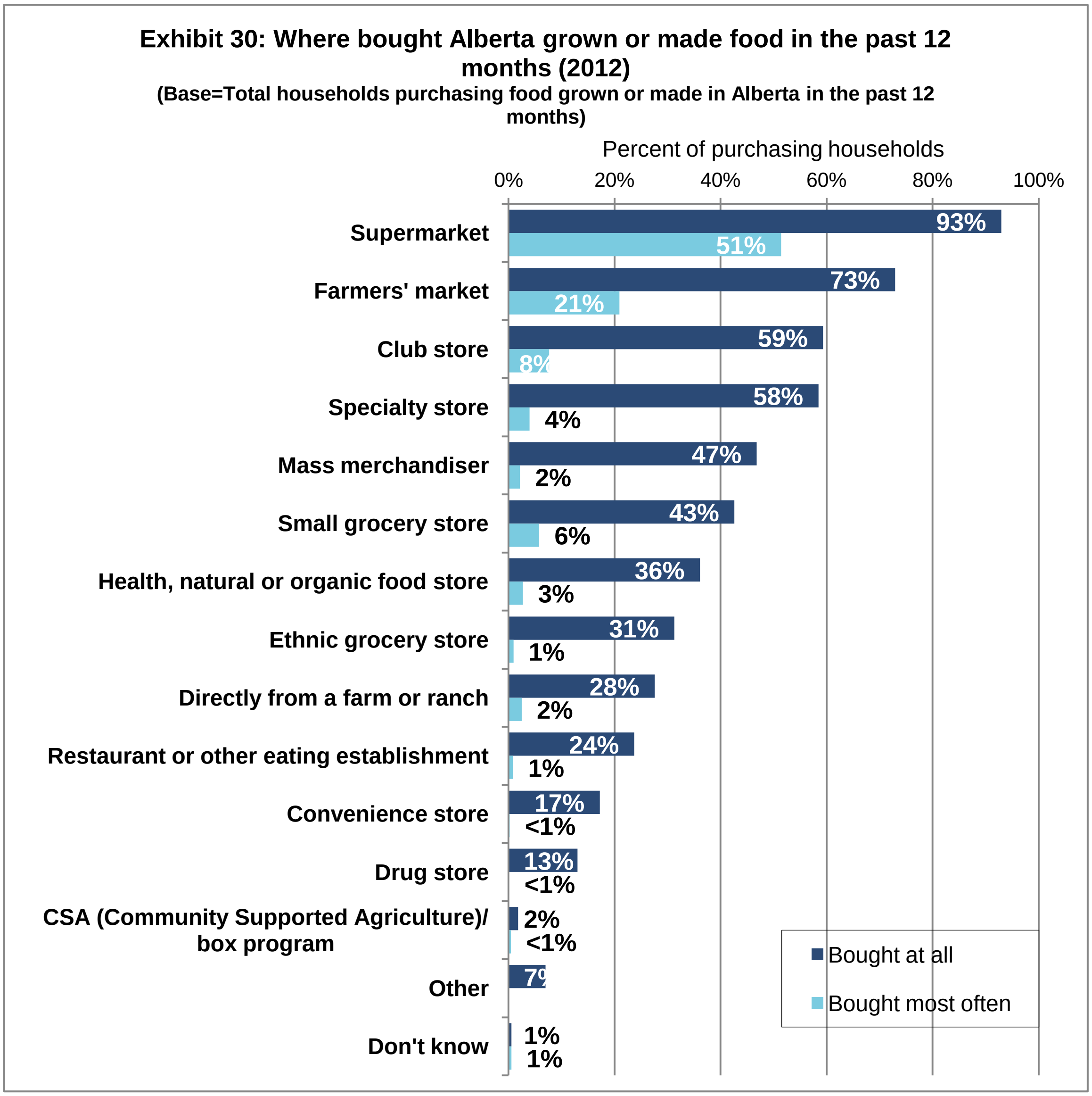
	Estimate ($million)		Confidence Interval 2012	
	2008	2012	Lower bound ($million)	Upper bound ($million)
Local food - Farmers' markets				
Value of purchases in the past year (n=506/ 731)*	302.0	598.4	478.3	726.8
Estimated change in value of purchases in next year (current purchasers and new market entries)	88.6	144.7	96.8	197.4
PROJECTED MARKET VALUE IN 12 MONTHS	**390.5**	**743.1**	**575.1**	**924.2**
Projected rate of growth in the next 12 months %*	29.3%	24.2%	20.2	27.2
Local food - Farm retail				
Value of purchases in the past year (n=270/ 276)	154.5	143.8	102.1	191.7
Estimated change in value of purchases in next year (current purchasers and new market entries)	96.1	100.4	49.5	161.6
PROJECTED MARKET VALUE IN 12 MONTHS	**250.6**	**244.2**	**151.6**	**353.3**
Projected rate of growth in the next 12 months %*	62.2%	69.8%	48.4	84.3

* Bases are for 2008 and 2012 respectively.

** Based on consumers' stated expectations (i.e., not projections based on purchasing data or trends)

PURCHASING OUTLETS

Exhibit 30 examines where purchasers of food grown or made in Alberta bought Alberta products and contrasts that with the one outlet where they buy Alberta food most often. It should be noted that each respondent was asked about each outlet on a prompted basis. As a result, the responses cannot be compared to the 2008 questions, which were based on spontaneous recall.



The primary source for food grown or made in Alberta was a supermarket, specifically defined as including, "Superstore, Safeway, Sobeys, Save-On-Foods, IGA, Co-Op, No Frills or a *regular* Walmart store". However, supermarkets were also by far the most important type of outlet supplying food grown or made in Alberta (51% bought Alberta food there most often, compared to 93% who shop at supermarkets).

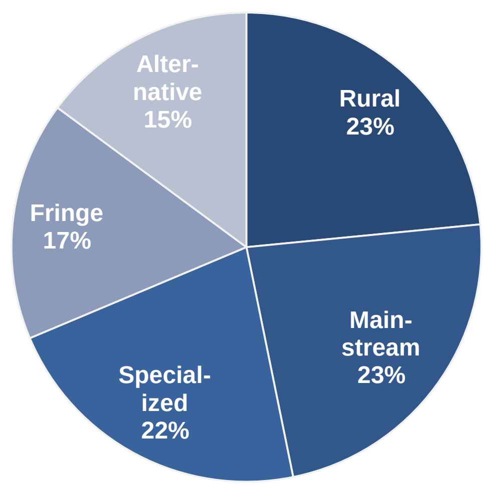
The second most widely used outlet was a farmers' market, with 73% using it in total, and 21% considering a farmers' market to be the place they buy food grown or made in Alberta most often.

At a tertiary level, used by almost 60% to purchase food grown or made in Alberta, were club stores (examples include Costco, Real Canadian Wholesale Club or The Grocery People Warehouse Market (TGP)) and specialty stores (such as a butcher, a bakery, a deli like Sunterra Market, The Cookbook Company Cooks, Sandy View Farms or Bite Groceteria, a fish or seafood store like Billingsgate Fish Company, or an in-town produce store such as H&W Produce). Club stores were third most likely to be chosen as the most frequent source of food grown or made in Alberta (8%).

The remaining outlets were used in the past 12 months for food grown or made in Alberta by between 2% and 47% of purchasing households.

One of these less frequently used outlets does stand out as a source used most often by 6% to buy food grown or made in Alberta. This was small grocery stores (for example, Extra Foods, Shop Easy Foods, Super-Valu Foods, Super-A Foods, Bigway Foods, AG Foods or Giant Tiger).[9]

Exhibit 31: Shopper segments for food grown or made in Alberta (2012)
(Base=Total purchasers)



Factor analysis of the stores purchased from yielded an interpretable 5 factor solution. By allocating each respondent to the segment that they scored highest on, all purchasers of food grown or made in Alberta could be classified into one of the sets of stores as seen in Exhibit 31.

The mix of stores each segment favoured distinctively, and those they did not, is graphically depicted in Exhibit 32. Some store types, especially supermarkets, were used extensively by more than one segment. Some were used quite a lot, but not quite as extensively as in the top segment (e.g., mass merchandisers such as Walmart Supercenters, Zellers or Target store).

9. The 7% who claimed they used "other" types of outlets for food grown or made in Alberta were mainly farm retail purchasers who had said earlier that they hadn't used farm retail venues in the past 12 months (4%). They may have missed their specific venue in the list that was read to them, or it wasn't specifically mentioned in the question. The major misses were for roadside stands, trucks and Hutterite colonies. Others were food processors and direct from a farm.

Mentions of garden centres or greenhouses were presumably not on a farm (<1%). Other types of outlets included food vendors (e.g., church, bake/craft sales, flea market, trade shows) at 1% and home grown/exchange (by self, family, friend) at 1%.

Exhibit 32: Mix of more and less frequently used stores for food grown or made in Alberta by shopper segment (2012) **(Base=Total in each shopper segment)**

	Shopper Segment				
	Rural %	Mainstream %	Specialized %	Fringe %	Alternative %
Farmers' market	91	55	93	47	
Small grocery store	75		19		12
Directly from a farm or ranch (farm retail)	67	4			
Club store		86			31
Mass merchandiser		83	27	66	14
Supermarket	80	100	98	89	98
Speciality store			97		
Ethnic grocery store			72	31	8
Health food, natural or organic food store			58		47
Restaurant		13		12	65
Convenience store			5	66	4
Drug store				66	
CSA/box program					12

High/est use High use Low use

- **Rural shoppers** made up almost one-quarter of the market. They were distinctive in favouring a mix of farmers' markets, small grocery stores and farm retail outlets and being less likely than average to purchase food grown or made in Alberta from a supermarket.

  Rural shoppers indicated that they would buy more food grown or made in Alberta in the next year at a higher than average rate. They were the predominant segment in the rural part of the province, living especially in small centres, but also on farms/ranches.

  It was also notable that among households saying a small grocery store was used most frequently for purchasing food grown or made in Alberta, the majority were rural residents, again especially those living in small centres.

- **Mainstream shoppers** made up almost one-quarter of the market. They used supermarkets, club stores and mass merchandisers and were less likely than average to have heard the term 'local food', or to purchase food grown or made in Alberta at farmers' markets, farm retail outlets or restaurants.

  This segment was somewhat more concentrated than average in major urban centres.
- Shoppers at **Specialized outlets** made up just over one-fifth of the market. Their distinctive mix of outlets included specialty stores, farmers' markets (where they spent more money than any of the other outlet clusters), ethnic grocery stores (e.g., T&T or another Asian store, The Italian Centre Shop or another Italian store, Turkish, Polish or other ethnicities) and health food, natural or organic food stores (e.g., Planet Organic, Amaranth Whole Foods, Blush Lane or Community Natural Foods and including Homegrown Foods, Earth's General Store). They tended to not use convenience stores (e.g., Mac's, 7-Eleven, Winks, Reddi Mart, Esso On the Run, Petro Canada Super Stop, Tags Food & Gas and including Husky, Mohawk, Shell, Parkland Fas Gas and Turbo), small grocery stores or mass merchandisers as much as average, but did mention supermarkets quite frequently.

  The vast majority lived in the Edmonton and Calgary CMAs, in all likelihood because only major metropolitan centres can sustain specialized stores. These shoppers tended to have a university education and an above average income.
- **Fringe shoppers** made up almost one-sixth of the market. Their preferred mix of outlets for food grown or made in Alberta included drug stores (e.g., London Drugs, Shoppers Drug Mart or Rexall Drugs), convenience stores, mass merchandisers and – to a greater degree than average but not as strongly as for specialized store shoppers – ethnic food stores. They were less likely to buy food grown or made in Alberta at restaurants or farmers' markets. They were particularly unlikely to grow food for their own consumption and less likely to cook most meals from scratch.

  This segment was slightly overrepresented in rural areas and had a below average household income.
- **Alternative shoppers** made up one-seventh of the market. They favoured restaurants and health, natural or organic food stores in particular, but were also above average in their use of supermarkets to buy food grown or made in Alberta. All CSA/box program purchasers were in this segment. The segment was particularly distinctive for *not* using a wide variety of outlets, particularly convenience stores, ethnic grocery stores, small grocery stores, mass merchandisers and club stores.

  Alternative shoppers were the second most likely segment to say they would buy more food grown or made in Alberta in the next year. They were very likely to be found in the Calgary CMA.

RESTAURANTS AND THE DINE ALBERTA PROGRAM

Restaurant users were asked if they had heard of "a program to promote restaurants that serve food prepared from ingredients that are grown or made in Alberta, called Dine Alberta". Twenty-two percent (22%) said that they had, with the proportion rising to 28% among those who had deliberately chosen to eat at a restaurant or other type of eating establishment specifically because it served food prepared from ingredients that were grown or made in Alberta. This result suggests that awareness of Dine Alberta is not tellingly greater in the target market than in the general population of restaurant goers.

Awareness was somewhat higher in Edmonton and lower among 18-34 year olds.

Respondents who had chosen a restaurant for Alberta ingredients were asked to identify where they last went. Twenty-four percent (24%) mentioned a restaurant that was affiliated with Dine Alberta. Restaurants that were named more than once were: Broxburn Café, Lethbridge; Blue Plate Diner, High Level Diner, Jack's Grill, Red Ox Inn, The Blue Pear, Edmonton; Farm, River Café, Calgary; and Huckleberry's Café, Wetaskiwin. Many others were mentioned once each.

About 43% of purchasers named restaurants that were not affiliated with Dine Alberta. Those mentioned more than once included: Urban Diner, Sawmill Edmonton/area; Charcut, Dairy Lane, Notable, Sunterra Market, The Cattle Baron, SAIT/Highwood Dining Room, Calgary; Grainfield's Restaurant, Lloydminster; and Prairie Bistro, St. Albert.

Some respondents referenced fast food restaurants such as MacDonald's or other chain restaurants such as The Keg, Montana's, or Swiss Chalet in various cities or towns around the province (13%).

20% were challenged by the question and unable to remember the name of the restaurant.

The full list of restaurants may be found under separate cover in the detailed tabulations.

RELATIONSHIP WITH FARM/ERS

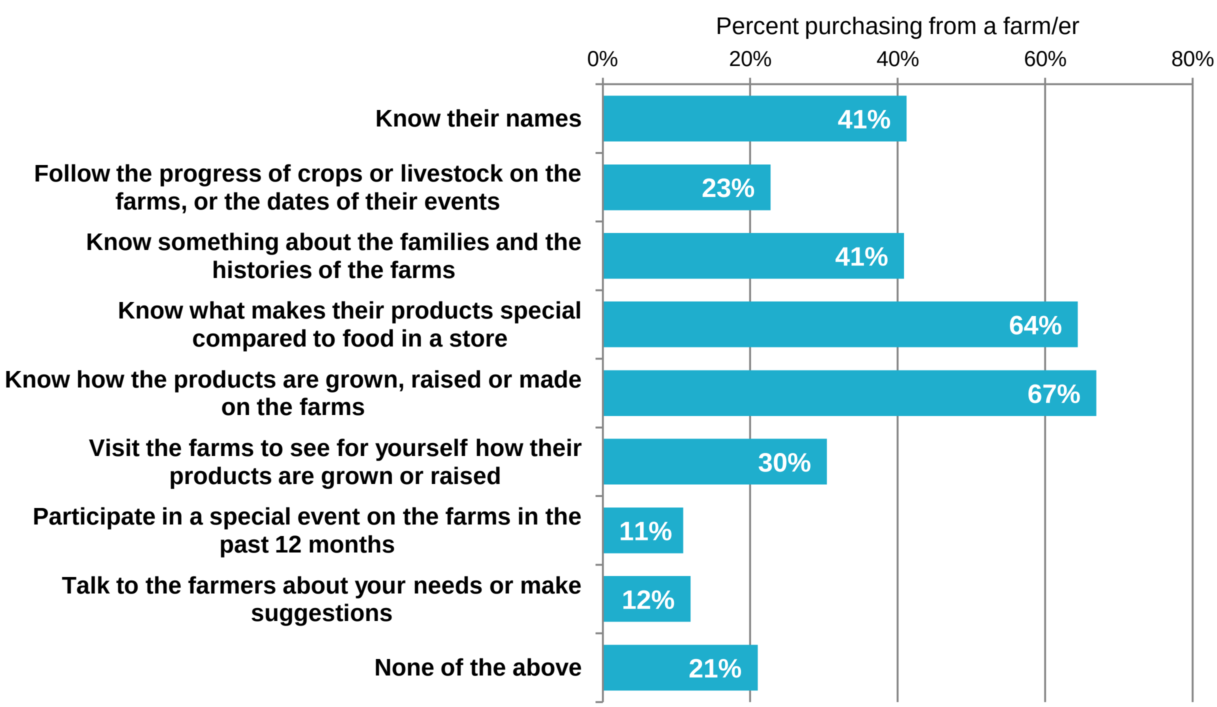
Knowledge and participation

A new area of interest in 2012 was to investigate just how important a direct relationship with a farm or farmer that supplies the household through alternative channels actually is and what elements of the relationship predominate.

Respondents who had purchased from a farmers' market, farm retail or a CSA/box program were asked a series of questions on the topic, following the preamble: "Thinking now of the farms that you buy from, do/did you …?" Their overall responses are shown in Exhibit 33. The statements were asked (and are arrayed) in an order that is interpreted as running from limited to considerable interaction and importance.

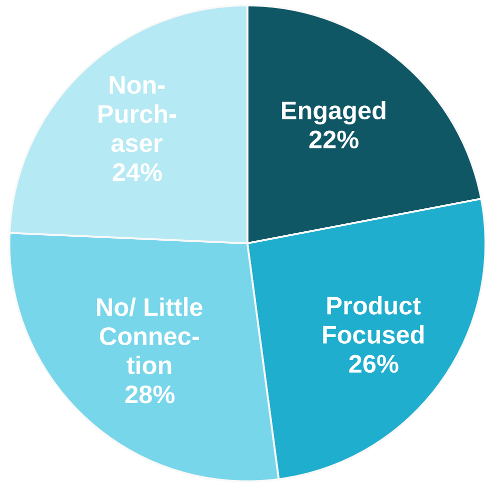
The basic shape of the plotted responses reveals that initial assumptions about how a relationship unfolds were not met among Alberta consumers (if they had been, the top statement would have had the highest level of agreement and the responses would have declined from there). Instead, it is evident that Alberta users of alternative agricultural markets know firstly about the products and secondarily about the farms/farm families themselves. They were much less likely to follow seasonal progress, visit the farms or provide feedback to the farmer. And fully one in five did not answer 'yes' to any of the statements at all.

Exhibit 33: Relationship to farm/ers purchased from at farmers' markets, farm retail or CSA/box programs (2012)
(Base=Total purchasing from a farm/er)



Cluster analysis of the data produced four farm relationship segments. These are shown in Exhibit 34.

Exhibit 34: Farm relationship segments (2012)
(Base=Total households)



- The largest segment at 28% (or 37% purchasing from a farm/er) had **No or Little Connection** to their farm suppliers. More than half of this group answered no to all statements, while a 'yes' response was given at rates far below average.

  This segment was less likely than average to buy food grown or made in Alberta, less likely to use multiple alternative markets, especially farm retail, or to say they would buy more in future. They were more often aged 18-34.

- **Product Focused Purchasers** made up one-quarter of households and 34% of purchasers. In this segment, over 90% agreed that they knew about the production practices of the farm/s and what made these products special compared to store-bought food. Other connections mentioned at an average level included knowing the farm/s names, and communicating their needs to the farmer/s. All other items were mentioned less often than average.

  Product Focused purchasers were likely to have heard the term 'local food' and bought food grown or made in Alberta at a higher rate from specialty stores – though these were not their most frequent source of supply. They were particularly likely to say they purchase most often from farmers' markets.

  This segment was overrepresented in the Edmonton CMA, the 45-54 age group and cook most meals from scratch.

- The **Engaged Purchaser** segment answered yes to all statements at a very high rate and appeared to have the closest relationship with the farms they buy from. One in five households fell into this segment, equivalent to 29% of purchasers. Approximately 95% of respondents in this group knew of the farm/s production practices, knew what made the products special *and over 80% had actually visited the farm/s to see these things for themselves*. Furthermore, over 95% knew something about the families and histories of the farm/s and over 80% knew their names.

  Even in this higher involvement group, the other assumed elements of a relationship were less likely to be in place. 60% followed the seasonal progress of the farm, 33% had participated in a special event on the farm and 23% had communicated their needs to the farmer/s.

  In the past 12 months, Engaged Purchasers were more likely to buy food grown or made in Alberta from a specialty store, directly from a farm/ranch (where they spent more than other farm relationship segments), a small grocery store and restaurants. They were the segment most likely to purchase from multiple alternative markets and were overrepresented in the Rural outlet segment and among rural residents.

- **Non-purchasers** made up one in four households in the total population. Not only did they not buy from farm/ers, they were also less likely to buy food grown or made in Alberta than the population as a whole (76% vs. 93%) or to expect to increase the amount they purchase in the next 12 months.

  The segment more often said mass merchandisers provided the food grown or made in Alberta that they did purchase. They often lived in one person households, mostly as older singles aged 65 years and older and had a lower than average household income.

Communication

In the 2012 wave of the study, there was interest in investigating how farm/ers currently communicate – and could best do so – with purchasers from alternative agricultural markets.

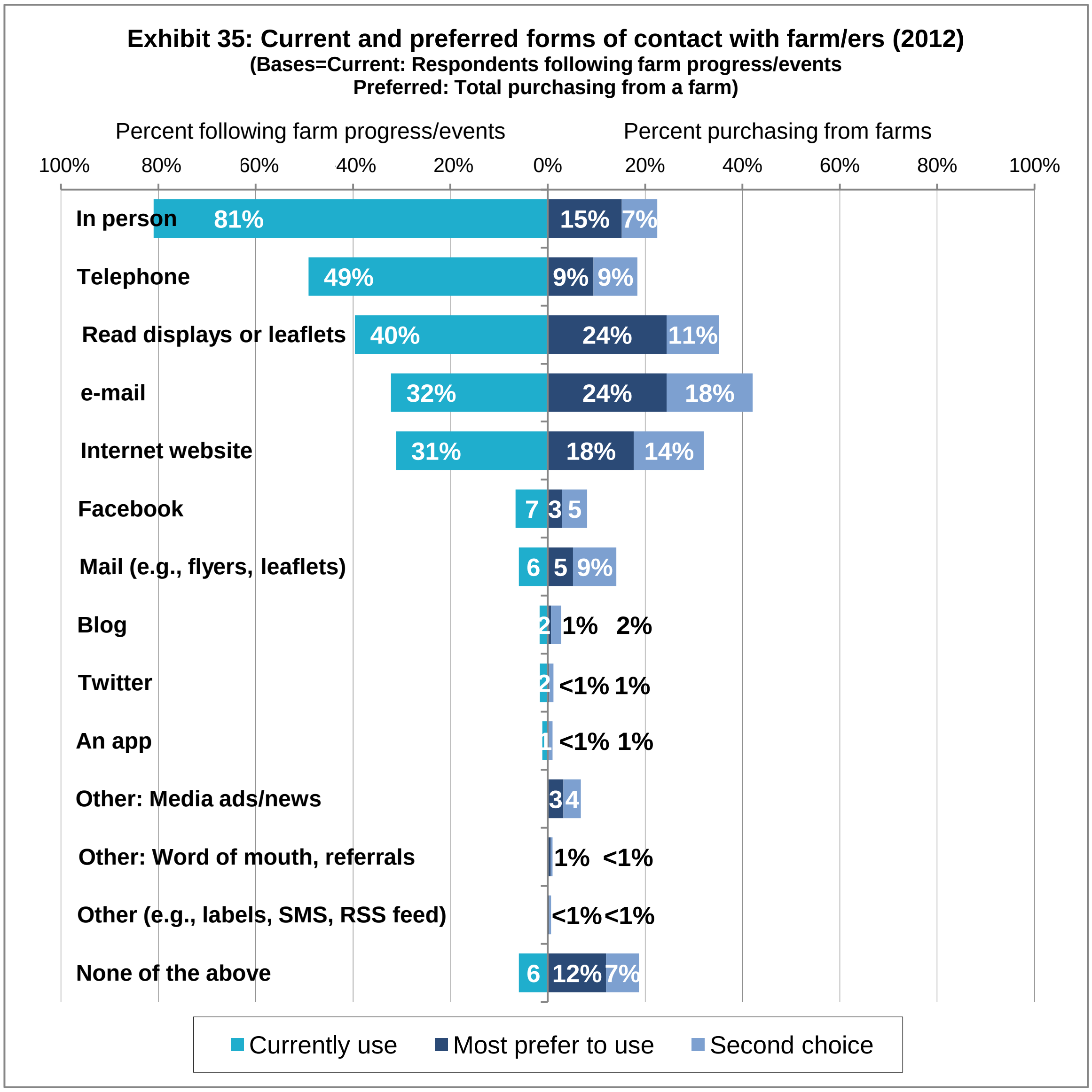
The 23% of respondents who said they followed farm progress or events were asked on a prompted basis what forms of contact they use to follow the farms they buy from. Then, again on a prompted basis, all farmers' market, farm retail and CSA/box program purchasers were asked what forms of contact they would most and second most prefer "to keep up to date with the activities and events at the farms" that they buy from. The responses are contrasted in Exhibit 35.

The results show that:

- By far the most extensively used form of contact was to talk to the person representing the farm. In person contact was particularly prevalent in small centres and increased as more alternative channels were used. Those who were in the Product Focused and No/Little Connection purchaser segments were much less likely to communicate in person.
- Telephone conversations (often in rural areas) and reading displays or leaflets were the next most commonly used communication methods, followed by e-mail and viewing of the farms' Internet sites (the Internet was especially popular in Calgary).
- Social media and conventional mail were used by only a few.

In contrast to the current methods of communication, when considering how they would like to be in contact with the farm/s, there were clear indications that a more removed approach would be preferred by the wider target audience:

- One-in-ten indicated that they had no desire to keep in contact at all. They were most likely to be aged 55+.



- Only 15% picked in person contact as their first choice, and even when the second choice was added in, it was not the preferred approach. This form of communication was less well supported in the major metropolitan centres (Calgary and Edmonton) than elsewhere, but was quite strongly preferred by Engaged Purchasers.
- There was no one overall preferred approach, which suggests that a variety of ways of making contact need to be used by producers and processors:
  - E-mail led the list of options, but was closely followed by reading displays or leaflets and accessing the farm's Internet website. E-mail and the Internet appear to be particular candidates for expansion as the first and second pick together exceeded the proportion currently using these methods.

    Calgary area residents were especially keen on communication by e-mail while rural residents were less enamoured of website use.

- Telephone contact was still preferred by some – especially people living on farms/ ranches, who used the Rural outlet mix of suppliers and were Engaged Purchasers – as was mail (e.g., sending flyers and leaflets to their homes);
- Social media, with Facebook being by far the most widely mentioned (but occasionally a blog, Twitter or an app), were next, but not chosen very often;
- A few respondents stated that they would like to see or hear about the farm in the media (newspaper, TV, radio), either in advertisements or news. This was not an option in the list read to respondents and would probably have been chosen more often if it had been included as a pre-defined form of communication.

BENEFITS AND BARRIERS: WHAT INFLUENCES THE DECISION TO BUY, OR TO NOT BUY, FOOD GROWN OR MADE IN ALBERTA?

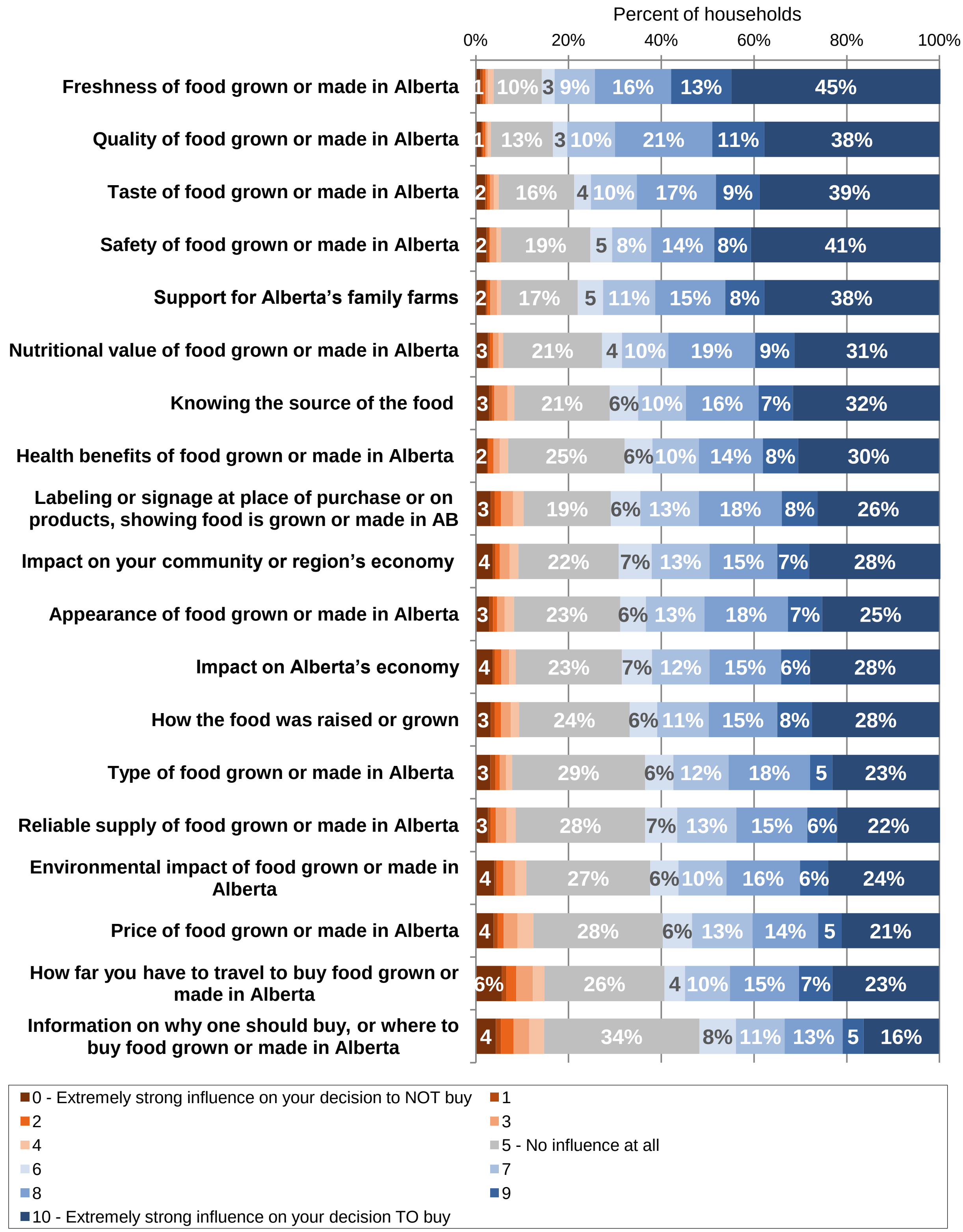
In 2008 survey participants were asked to identify the main benefit of buying food grown or made in Alberta and the main reason for not buying more food grown or made in Alberta. In 2012 the features mentioned were reviewed and compared to responses to similar questions reported more recently in various studies. The strength of influence of each of the major features was then assessed for all respondents, purchasers and non-purchasers alike. The question asked respondents to rate the strength of influence each of 19 items had on their decision to buy, or to not buy, food grown or made in Alberta.

The detailed results are depicted in Exhibit 36. Items in the chart are listed in order of importance based on the average score. The figures show that:

- There were no items rated predominantly as a disincentive or barrier to purchase;
- All items were scored positively (6-10/10 in blue) by at least half the respondents, showing that they each were of influence in a significant number of households;[10]
- However, for about one in five households, most items were thought to not influence buying decisions at all (in grey). The main exception was for information on where or why to buy food grown or made in Alberta, identified by over one-third as not being influential;
- The most influential benefits were as follows:
  - Freshness, which maintained the same top position as in 2008;
  - The top three items all demonstrated high regard for the food itself – its freshness, quality and taste;

10. This "makes sense" since the major or top ranking items – whether benefits or barriers (and that depended on an individual's interpretation) – were selected for inclusion in the survey.

Exhibit 36: Strength of influence of various items on decision to buy, or not to buy, food grown or made in Alberta (2012)
(Base=Total households)



- Safety was in fourth place, an amazing result since the survey was conducted at the height of a major national and international recall of meat produced by Alberta's largest packing plant;
- Rounding out the top five was providing support for Alberta's farm families.

- At the other end of the scale were two items that a substantial minority viewed as influencing a decision to not buy:
  - How far they have to travel to purchase food grown or made in Alberta (greater distance functions as a barrier); and
  - Information on why or where to buy (lack of information functions as a barrier).

The importance of distance was specifically assessed among purchasers from farmers' markets. The trend to lower use at greater distances confirms that even moderate distance has a quite significant impact on use. The results are shown below.

In the past 12 months did you purchase from a farmers' market:	**Yes**	**No**	**Not sure**
Close to your home	86%	13%	1%
In your city or town, but not close to your home	65%	33%	2%
While you were on a pleasure trip elsewhere in Alberta	29%	70%	1%

These figures show that the vast majority of farmers' market purchasers visit a location close to their homes and also travel further afield within their own community. They suggest that 13% of purchasers only go to a local farmers' market that is not close to their home, but fully one-third do not travel across town to access a less convenient location. More remote locations outside the city or town were much less likely to be used, though from a tourism perspective, 29% would be a very positive number.

Additional insight on what features influence the purchase of food grown or made in Alberta may be gained by comparing the average scores of purchasers vs. non-purchasers and purchasers vs. those who plan to buy more in the next 12 months. The largest score differentials were found as follows:

Non-purchasers less influenced by:	**Will buy more influenced more by:**
Quality of food grown or made in AB	How the food was raised or grown
Health benefits of food grown or made in AB	Support for Alberta's family farms
Nutritional value of food grown or made in AB	Impact on your community or region's economy
Freshness of food grown or made in AB	Safety of food grown or made in AB
Taste of food grown or made in AB	Knowing the source of the food
Knowing the source of the food	

For non-purchasers, it would appear that the largest gaps are found for just those items that are most influential to purchasers, especially those that are features of the food itself. Apparently they do not believe as strongly as purchasers in these benefits and suit actions to perceptions.

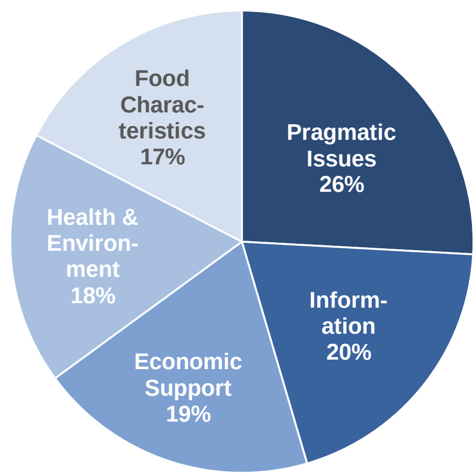
The picture is very different for the group that expects it will purchase more in the next 12 months. Its distinguishing benefits focused on production practices, benefits to Alberta farms and to the local economy.

The only item the two groups had in common was knowing the source of the food. While this is complementary to understanding production practices among the enthusiasts who will buy more, for non-purchasers it emphasises their much lower interest or concern about place of origin and in itself offers a reason for not buying food grown or made in Alberta.

From the above, it is evident that themes exist in the way different people view food grown or made in Alberta. A factor analysis of the results revealed five meaningful factors or groups of features and respondents were categorized according to which group best described their point of view. The groups are shown in Exhibit 37.

Exhibit 37: Predominant themes influencing the decision to buy, or not to buy, food grown or made in Alberta (2012)

(Base=Total households)



- One in four households fell into the largest group who were most concerned with **Pragmatic Issues** such as the price of the food and how far one needs to travel to buy it. Also scoring fairly strongly was the influence of having information on where and what to buy.

  The group included almost half of respondents who had not bought food grown or made in Alberta in the past 12 months or who did not know if they had.

  When they purchased from farms, they fell into the No/Little Connection cluster; they were overrepresented in buying Alberta food from Fringe stores and were particularly likely to regard supermarkets as their main source of food grown or made in Alberta. All these differences suggest a lack of interest in actively supporting Alberta products.

  Demographically, those concerned with Pragmatic Issues were more likely to have pre-school children in the household, a below average income and were less likely to be married or empty nesters.

- One in five households was mainly concerned with **Information**. This included: information on why and where to buy, labelling and signage, knowing the source of the food and the type of food grown or made in Alberta.

  They were particularly likely to say they would buy more food grown or made in Alberta in the next 12 months – possibly when they had the information they were looking for – and were most likely to use Alternative outlets.

- **Economic Support** motivated almost one-fifth of households, primarily because of the impact of purchasing food grown or made in Alberta on the provincial economy (also the community or regional economy and Alberta's family farms, but not to the same degree).

  They purchased Alberta food most often at farmers' markets but had no other distinguishing behaviour patterns.

  This group was more likely than average to have young families with the youngest child up to 12 years of age and were more often male.

- The one in six households in the **Health & Environment** group were most influenced by the health benefits, nutritional value and environmental impact of food grown or made in Alberta. Rounding out the list were food safety, how the food was grown or raised (as established in 2008, both safety and provenance are linked to trust) and distance one would have to travel to buy it. The interpretation of distance here was likely related to environmental impact, rather than convenience, as in the Pragmatic Issues group.

  Perhaps not surprisingly, the group was strongly aligned with the Product Focused farm relationship cluster and above average in shopping at Specialized outlets – particularly health, natural or organic food stores – and less at Mainstream outlets. They were also the group most likely to say they would increase their purchase of food grown or made in Alberta in the next 12 months.

  The Health & Environment group paid slightly more at farmers' markets for food grown or made in Alberta, supporting their greater likelihood of saying that price was not a purchase influencer. They also had the highest income of all purchase influence groups.

- The group focused on **Food Characteristics** made up one-sixth of the market. Its strongest influences were freshness, quality, taste and appearance of the food itself, followed to a lesser degree by food safety.

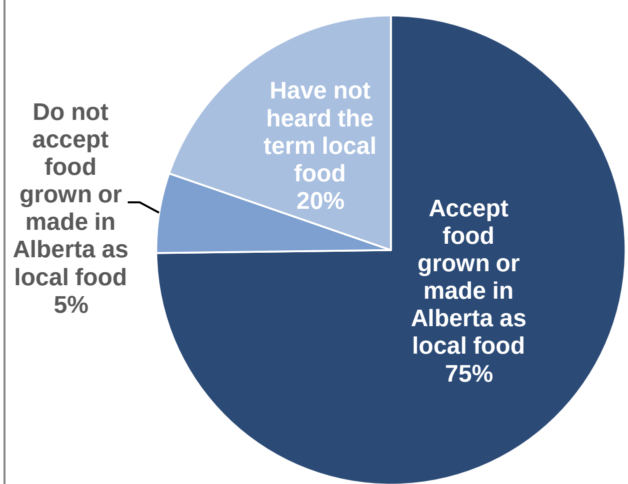
  Group members mentioned shopping for food grown or made in Alberta at mass merchandisers and club stores more often than other groups.

  The group was underrepresented among pre-school family households, but was not otherwise distinguished demographically.

IS FOOD GROWN OR MADE IN ALBERTA ACCEPTED AS 'LOCAL FOOD'?

80% of respondents had heard the term 'local food' and within this group, 93% would accept food grown or made in Alberta as local food. The distribution for the population as a whole is shown in Exhibit 38.

Exhibit 38: Whether food grown or made in Alberta is accepted as 'local food' (2012)
(Base=Total households)



Awareness of the term 'local food' was higher among those shopping at Specialized and Alternative outlets and among the Engaged and Product Focused farm relationship clusters. It was better known when two or more alternative markets were used, but even among non-users of alternative markets, the term was recognized by over 70%.

Households that had purchased food grown or made in Alberta and who intended to purchase more were also more likely to be familiar with the term. Demographically, there was higher awareness in the 45-54 age group, among females and respondents with a university degree.

Acceptance of food grown or made in Alberta as local food was marginally lower among those shopping most often at farmers' markets. There were no other differences of note.

MARKET PROFILES

Demographic and geographic purchaser profiles

Since the proportion of the population purchasing food grown or made in Alberta in the past 12 months was so large, the market profile was very similar to that of the overall household population (see Appendix II for a profile of Alberta food purchasers).

Exhibits 39 to 45 show market penetration within different socio-demographic and geographic groups and the discussion summarizes inter-group differences in behaviour and attitudes relating to food grown or made in Alberta.

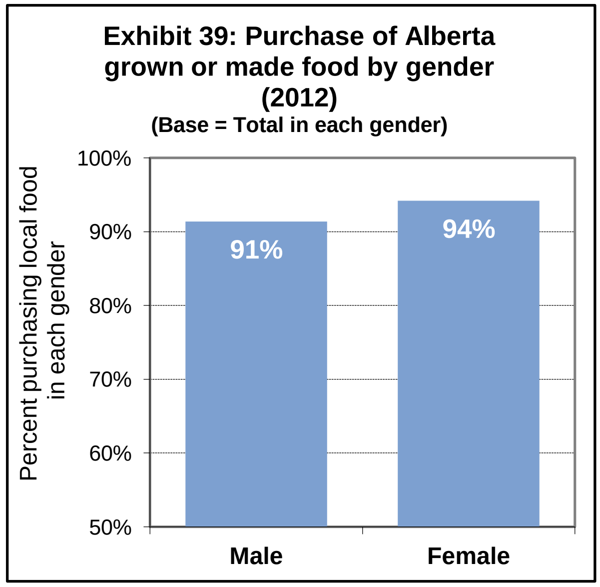
GENDER

There was no statistically significant difference in consumption between the genders (Exhibit 39).

However, females were more likely to state they would buy more Alberta food in the next 12 months, while males more often thought they would buy the same.

Females were also more likely to have heard of 'local food' and to say the household cooked most meals from scratch.

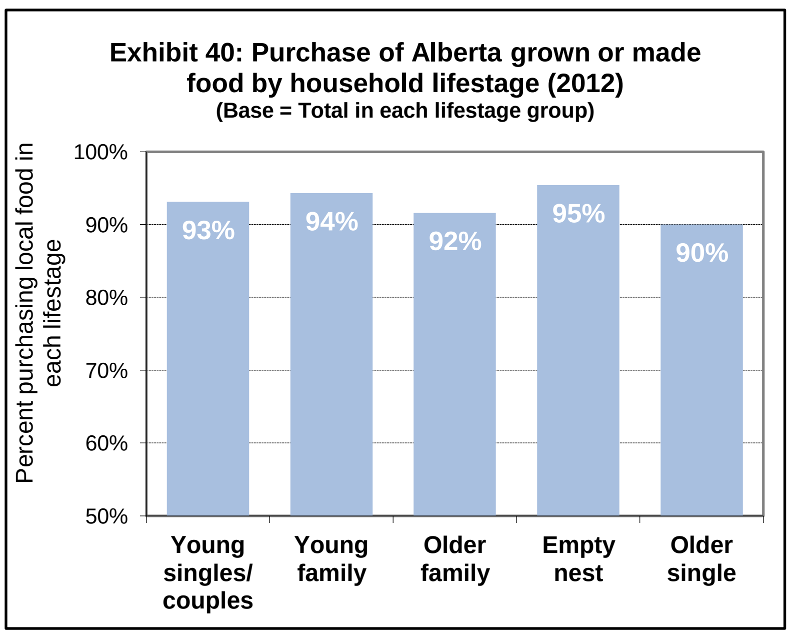
In their contact with farms, females were more likely to use Facebook. Their preference for contact via mail and through the media was higher than among males who favoured in person contact or none at all.



SOCIAL CHARACTERISTICS

The incidence of use of food grown or made in Alberta was slightly higher in the empty nester **lifestage**, but not significantly different for the other social factors – age and marital status (Exhibit 40).

Older singles said more often than other lifestages that they would be buying less Alberta food in the next 12 months.



Families and empty nesters were more likely to grow food for their own consumption and empty nesters (in particular) and older families with teen and older children were the most likely to cook from scratch.

The amount spent at farm retail outlets on food grown or made in Alberta was higher among older families. Young singles/couples were higher spenders in summer at farmers' market than other lifestages.

Forms of contact currently used with farm/ers were quite similar across the lifestages, except that older families were more likely than others to use e-mail. In both older and young families, e-mail and websites were the two most preferred contact options. Many empty nesters and older singles – and 55+ year olds – did not want any form of contact at all; where a choice was made it tended to be in person. Young singles/couples differed from the rest in choosing Facebook and a blog as their preferred forms of contact more frequently than average.

Finally, there were also differences by lifestage in the types of outlets used to purchase food grown or made in Alberta. Young singles/couples were over-represented in using ethnic food stores, young families in using convenience and small grocery stores and empty nesters in using small grocery stores.

Market penetration, both current and intended, did not differ significantly by **marital status** or **age** (Exhibit 41 and 42).

Married/couple households were more likely to grow food for their own consumption than other marital status groups. They were somewhat more likely to buy at club stores, while singles chose specialty stores most often at a higher than average rate.

18-34 year olds spent more than others at farmers' markets during the summer, but had No/Little Connection with farm/ers and tended to shop for food grown or made in Alberta at Fringe stores.

45-54 year olds spent more than others on farm retail. They were also the age group most likely to have heard the term 'local food'.

Exhibit 41: Purchase of Alberta grown or made food by marital status (2012)
(Base = Total in each marital status group)

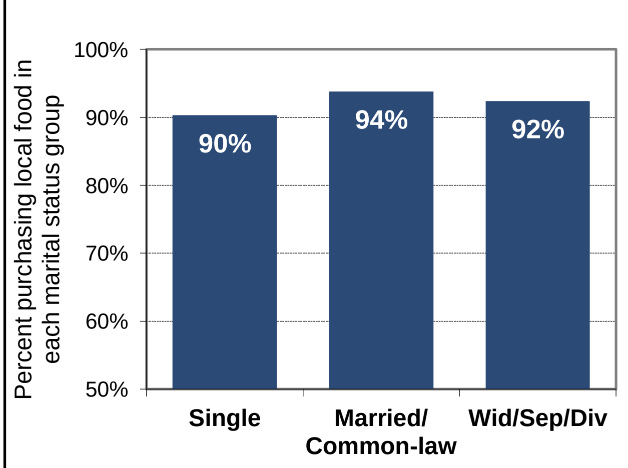
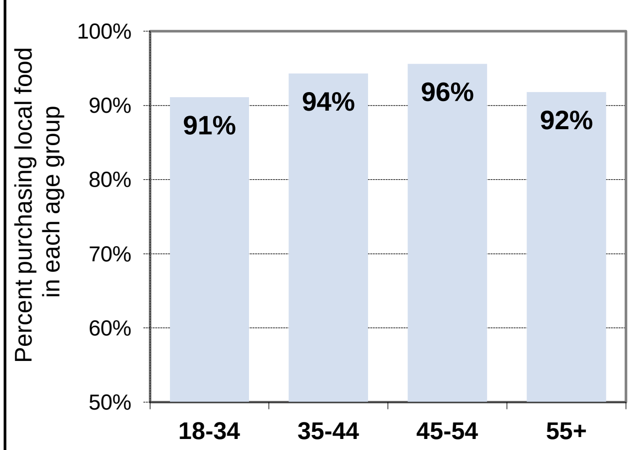
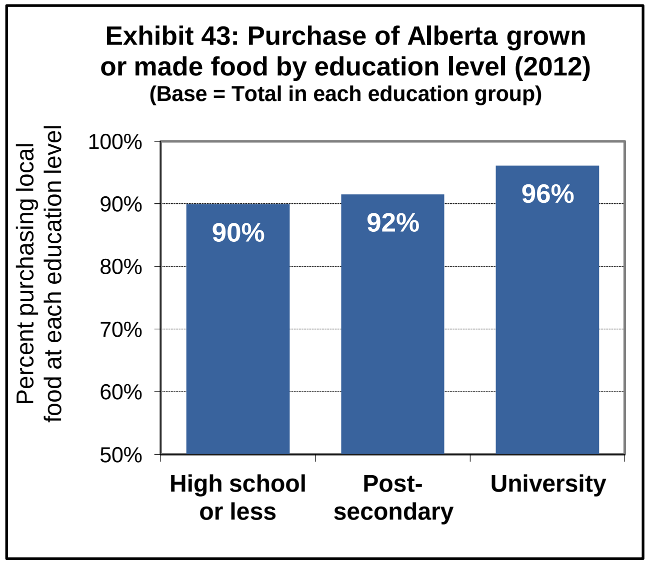


Exhibit 42: Purchase of Alberta grown or made food by age (2012)
(Base = Total in each age group)

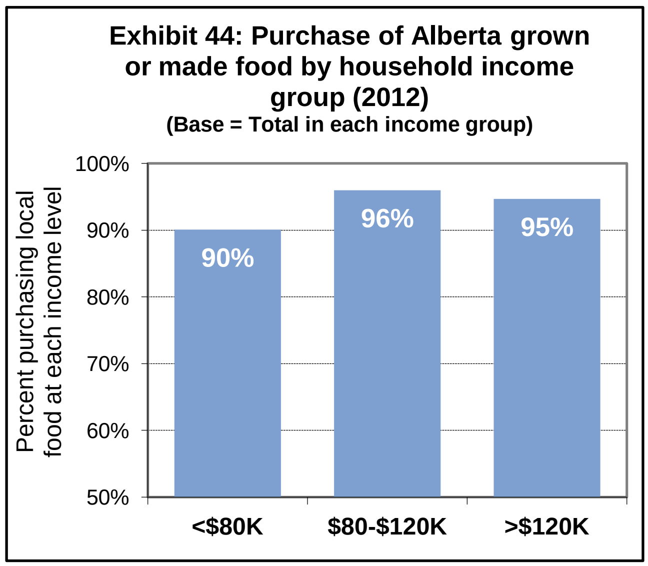


Incidence of purchase of food grown or made in Alberta was higher in the highest **education** group, which was also the group most likely to have heard the term 'local food' (Exhibit 43).



University graduates were more likely to prefer to communicate with farm/ers on their website. In contrast, respondents with a high school education were especially likely to say they wanted no contact at all, probably because older singles made up a good part of the cohort.

University graduates bought food grown or made in Alberta at health, natural or organic food stores more often than average and bought there most frequently. They favoured a Specialized mix of stores for their purchases.

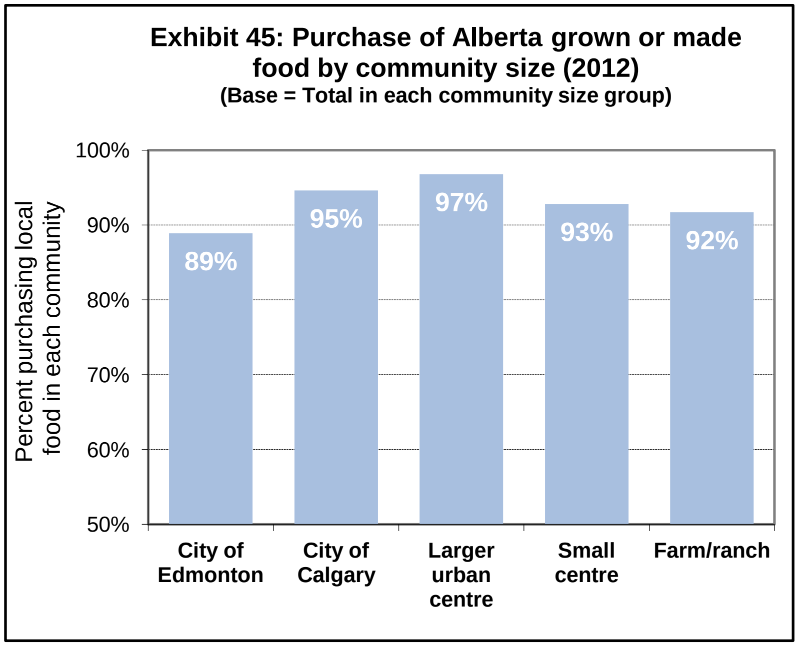


Market penetration was slightly lower in the lowest **income** group, suggesting that ability to afford food grown or made in Alberta – or perceptions of the ability to do so – were a real factor influencing behaviour (Exhibit 44).

Households in the highest income group were more likely to use club and specialty stores. There were no other distinguishing factors.

Geographic location

In terms of geographic location, there were no statistically significant differences in purchase incidence (Exhibit 45).



Farm/ranch residents were far more likely than urban residents to grow food for their own consumption and to cook from scratch. Along with small urban centres, their relationship with farm suppliers was to be Engaged and their preferred form of contact was telephone and in person. These results suggest that the relationship was far more personal than in larger urban centres. Their mix of outlets for buying Alberta food was Rural and for farms/ranches especially, included farm retail and small grocery stores, with farm retail being the most frequent source far more often than average. For small centres the mix was most likely to include small grocery stores and mass merchandisers, with small grocery stores being the most frequent source.

Large urban centres were somewhat similar to rural and small centres in preferring in person contact with farm/ers and favouring a Rural outlet mix, especially small grocery stores.

City of Edmonton residents spent more at farmers' markets than other geographic locations. Their relationship with farm/ers was Product Focused and their preferred method of contact more often was to read displays and leaflets. The current outlet mix was more frequently Specialized, with ethnic food stores being especially well used.

Although City of Calgary and City of Edmonton residents spent more than average per visit in summer at farmers' markets, this only translated into higher total expenditures in the City of Edmonton. City of Calgary residents were overrepresented in the No/Little Connection farm relationship cluster and in using websites for connecting with the farm. Their preference for communication was firstly for e-mail and secondly to use a website. In terms of shopping for food grown or made in Alberta, Calgary residents were more often found to use Specialized and Alternative outlets, particularly health, natural or organic food stores, specialty stores and ethnic stores.

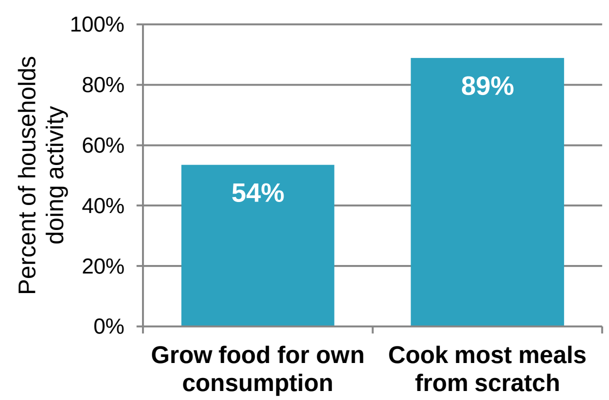
Behavioural profiles

Two criteria that have recently been shown in the literature to be aligned with the use of local food and attitudes to it, were whether the household grows food for its own consumption and whether anyone in the household cooks most meals from scratch.

GROW FOOD FOR OWN CONSUMPTION

More than half of all households indicated that they did grow food themselves, particularly married/couples with a family – especially with pre-school age children – and empty nesters. The proportion was much higher among farm/ranch residents. It was also higher among households that purchased from many of the alternative agricultural markets.

Exhibit 46: Participation in activities aligned with purchase of food grown or made in Alberta (2012)
(Base=Total households)



Households that grew food for their own consumption were more knowledgeable about farmers' markets, farm retail and CSA/box programs. They were also more likely to be farmers' market and farm retail purchasers, and more likely to have chosen to eat at restaurants because they serve Alberta food.

Farmers' market users who grew their own food were prepared to travel further, using farmers' markets that were not close to their home, or in another place altogether, at a higher rate than those who did not grow their own food. They were more often year-round purchasers, more frequent purchasers and higher spenders.

They intended to spend more per visit on farm retail in the next 12 months, while non-users who grew food for themselves were more interested in becoming farm retail outlet users.

Households that did not grow food for their own consumption were less likely to buy food grown or made in Alberta (or did not know whether they had) or to cook from scratch. They were influenced most by Pragmatic Issues when buying Alberta food and more often used Fringe outlets when shopping. In contrast, households growing food were influenced most by Information and were more likely to be in an Engaged relationship with farm suppliers.

Thus this study also showed a relationship between growing food at home and the use of alternative markets and food grown or made in Alberta. Apparently, growing one's own food is a marker of interest in local food and signals willingness to buy what they do not produce themselves at alternative markets.

COOK MOST MEALS FROM SCRATCH

Nine-out-of-ten households claimed that most meals were cooked from scratch. They purchased food grown or made in Alberta at a higher rate than non-cooks.

Empty nesters were especially likely to cook from scratch, while non-family households, both young (singles, groups and couples) and older singles, were less likely to do so. Home cooks were found more often among farm/ranch residents and among those who grow their own food.

They were more likely to use at least one alternative market, especially farmers' markets (and more frequent purchasers both in summer and winter, as well as higher spenders than non-cooks) and were more often specialty store users.

Households that did not cook from scratch but bought at farm retail outlets were far more likely to be summer-only purchasers, but would like to go more often.

Home chefs were more likely to have heard of local food and were found at an above average rate among those influenced to purchase food grown or made in Alberta by Health & Environmental criteria. They were also more likely to have a Product Focused relationship with the farms they purchase from (non-cooks tending to have No/Little Connection).

Conclusion

Four agricultural distribution channels were addressed in the 2012 monitoring study of alternative agricultural markets: farmers' markets, farm retail, CSA/box programs and restaurants. The section on food grown or made in Alberta (local food) was revised to provide greater depth of insight.

Information was collected to provide an updated demand-side estimate of the value of each market by surveying households throughout the province of Alberta. The survey investigated the value of all purchases and the proportion spent on food grown or made in Alberta over a 12 month period from September 2011 to August 2012 for each alternative market. It also identified changes in purchasing behaviour expected by current purchasers and the likely spending of new purchasers entering the market in the next 12 months. In addition, for food grown or made in Alberta, the survey examined relationships with farm/ers, purchase behaviour and features that influence purchase.

Current and future market value was projected from the information provided. In addition, estimates of market size (penetration) were obtained and present levels of awareness/familiarity with each market established. Demographic, geographic and degree of use profiles were prepared as well.

This third study of Alberta's alternative agricultural markets remained a substantive and challenging project. We are hopeful that the Ministry, the retail industry and agricultural suppliers will be successful in applying the information provided in the report and that there will be continued and managed development of these emerging and growing markets.

Appendix I:
Record of contact

Empirical Method of Response Rate Calculation (MRIA)

	Full Sample
Total Numbers Attempted	37,457
Invalid	
NIS, fax/modem, business/non-residential/dialler returns.	4,710
Unresolved (U)	
Busy, no answer, answering machine	18,244
In-scope - Non-responding (IS)	
Language problem	325
Illness, incapable	-
Selected respondent not available	666
Household refusal	2,335
Respondent refusal	9,735
Qualified respondent break-off	156
In-scope - Responding units (R)	
Language disqualify	-
No one 18+	-
Other disqualify - Cannot speak to household head/ qualified household head	110
- Make commercial purchasing decisions	118
Completed interviews	1,058
Response Rate = R/(U+IS+R)	**3.9%**
Co-operation Rate = R/Total asked	**8.9%**

Appendix II:
Market profiles

Table 11: Demographic and geographic purchaser profiles for alternative markets and food grown or made in Alberta

	Total sample			Farmers' markets			Farm retail			CSA	Restrnts for AB ingrdnts	Food grown or made in AB	
	2004 (wn=1007 un=1150) %	2008 (wn=1015 un=1068) %	2012 (wn=1000 un=1058) %	2004 (n=596) %	2008 (n=604) %	2012 (wn=710 un=752) %	2004 (n=342) %	2008 (n=309) %	2012 (wn=274 un=289) %	2012 (wn=17 un=18)* %	2012 (wn=221 un=234) %	2008 (n=912) %	2012 (wn=931 un=985) %
Gender													
Male	41	41	38	37	39	37	39	41	35	39	32	40	38
Female	59	59	62	63	61	63	61	59	65	61	68	60	63
Household life stage													
Bachelor	5	4	3	5	3	3	3	3	2	6	2	4	3
Young group	2	1	1	2	1	1	3	+	1	-	1	1	1
Young couple	11	6	7	9	6	8	10	6	6	-	10	5	7
Pre-school family	15	13	14	16	13	13	17	13	14	17	13	12	13
Young family	13	12	9	13	12	10	16	16	13	16	11	12	10
Teen family	11	10	9	11	10	9	14	10	10	17	9	10	9
Grown family	7	11	9	8	11	10	6	11	9	28	9	10	9
Empty nester	22	27	28	23	29	29	21	26	28	-	28	28	29
Older group	3	2	3	4	2	3	3	4	4	6	4	2	3
Solitary survivor	9	13	17	9	11	14	6	11	13	12	13	13	16
Refused	1	2	-	1	2	-	1	+	-	-	-	2	-
Household size													
Average #	2.86	2.76	2.63	2.86	2.82	2.69	3.09	2.94	2.89	3.39	2.70	2.76	2.64
Age													
18 to 24	7	2	2	6	2	1	6	3	2	-	2	2	2
25 to 34	18	12	11	16	12	11	13	9	9	22	12	11	11
35 to 44	25	21	18	25	20	19	28	23	20	27	22	21	19
45 to 54	23	26	25	27	28	28	29	27	32	17	30	26	26
55 to 64	14	20	24	14	19	26	15	21	23	28	23	20	24
65 and over	12	18	20	12	18	15	7	17	14	5	12	19	19
Refused	1	1	-	1	1	-	2	+	-	-	-	1	-
Marital status													
Single	14	11	12	12	9	10	11	10	10	6	11	11	11
Married/couple	71	70	70	73	74	72	77	74	72	72	72	70	70
Widowed	5	6	8	4	6	7	3	6	6	5	7	6	8
Separated	2	3	3	2	1	3	2	2	5	-	2	2	3
Divorced	7	9	8	8	9	8	6	7	8	17	9	9	8
Refused	1	2	-	1	1	-	1	1	-	-	-	2	-
Education													
Less than high school	9	7	5	7	5	3	7	5	3	6	3	6	4
High school graduation/ some post-secondary	40	35	30	40	34	29	41	35	30	11	23	35	30
College/ trade certificate	19	22	22	18	23	21	16	23	19	22	23	22	21
University degree	31	34	43	34	37	47	36	36	48	61	51	35	45
Refused	1	2	-	1	1	-	1	1	-	-	-	2	-

	Total sample			Farmers' markets			Farm retail			CSA	Restrnts for AB ingrdnts	Food grown or made in AB	
	2004 (wn=1007 un=1150) %	2008 (wn=1015 un=1068) %	2012 (wn=1000 un=1058) %	2004 (n=596) %	2008 (n=604) %	2012 (wn=710 un=752) %	2004 (n=342) %	2008 (n=309) %	2012 (wn=274 un=289) %	2012 (wn=17 un=18)* %	2012 (wn=221 un=234) %	2008 (n=912) %	2012 (wn=931 un=985) %
Household income													
Average ($000)	$66	$81	$90	$71	$86	$95	$74	$83	$97	$102	$96	$82	$91
Region													
Edmonton CMA	32	32	32	32	31	32	33	30	28	56	29	31	31
Calgary CMA	32	33	33	33	35	34	26	25	29	27	38	33	33
Major urban centre	10	10	10	10	9	10	9	10	10	-	7	10	10
Rural Area	25	26	25	25	25	24	31	35	33	17	26	26	26
Community size													
City of Edmonton	24	23	23	23	23	22	25	22	18	56	19	23	22
City of Calgary	30	31	30	31	34	32	25	24	27	27	35	31	31
Larger urban centre	15	16	22	16	15	23	13	15	22	-	22	16	22
Small urban centre	12	20	16	22	20	14	24	26	19	11	14	21	16
On a farm/ranch	10	9	9	8	8	9	12	13	14	6	10	9	9
Refused	8	+	+	-	+	-	-	-	-	-	-	+	+

*Note extremely small base. Figures may not add due to rounding. + = Less than 0.5%

Appendix III:
Degree of use categories and bases

Degree of use category definitions

	Farmers' markets	Farm retail	Restaurants for AB ingredients
Number of purchases in past year (visits)			
High	13+	6+	13+
Medium	5-12	3-5	5-12
Low	1-4	1-2	1-4
Amount spent on last purchase ($)			
Heavy	71+	151+	101+
Medium	31-70	41-150	51-100
Light	1-30	1-40	1-50
Total expenditure in past year ($)			
Heavy	801+	501+	1501+
Medium	151-800	101-500	251-1,500
Light	1-150	1-100	1-250

Degree of use bases

	Farmers' markets wn	Farm retail wn	Restaurants for AB ingredients wn
Total households	**710**	**274**	**218**
Number of purchases in past year (visits)			
High	170	55	49
Medium	249	62	85
Low	275	145	84
Expenditure on last purchase ($)			
Heavy	133	48	47
Medium	279	91	66
Light	281	123	105
Expenditures in past year ($)			
Heavy	134	51	41
Medium	272	90	82
Light	288	121	95

Appendix IV: Questionnaire

ALTERNATIVE AGRICULTURAL MARKETS

RECORD REGION FROM SAMPLE POSTAL CODE:

21	City of Edmonton
22	City of Calgary
23	Major Urban
24	Edmonton Metro
25	Calgary Metro
26	Rural

INTRODUCTION:

Hello, this is … from Infact Research. We're conducting a short research project on behalf of Agriculture and Rural Development, a department of the Government of Alberta. The results of the research will help Alberta farmers and food processors learn where and how to better market food and agricultural products directly to the Alberta public.

The survey will take about 15 minutes, depending on your answers.

Your responses will be kept totally confidential. The information is being collected under the authority of, and is protected by, the Freedom of Information and Privacy Act. I can assure you that we are not selling or promoting anything.

IF RESPONDENT WOULD LIKE TO VERIFY THAT WE ARE CALLING ON BEHALF OF THE ALBERTA GOVERNMENT YOU CAN GIVE OUT THIS CONTACT. ONLY IF NECESSARY:

MIMI LEE, NEW VENTURE ECONOMIST, LOCAL / DOMESTIC MARKET EXPANSION BRANCH,
ALBERTA AGRICULTURE AND RURAL DEVELOPMENT
PHONE: (780) 968-3552 (TOLL FREE IN ALBERTA 310-0000)
E-MAIL: Mimi.Lee@gov.ab.ca

SCREENER

(QA) Are you a head of your household? (DO NOT READ LIST)

1 YES
2 NO

[IF YES CONTINUE. IF NO: (QAX) May I please speak to a household head? IF YES REINTRODUCE. IF NO, ARRANGE CALLBACK OR THANK IF REFUSED]

(QB) Some of the discussion will be about purchasing food. Would you be in a position to talk about PAST food purchases and expenditures made by your household? (DO NOT READ LIST)

1 YES
2 NO

[IF YES CONTINUE. IF NO: (QBX) May I please speak to a household head who can do this? READ IF NECESSARY: … who is in a position to talk about PAST food purchases and expenditures made by your household IF YES REINTRODUCE. IF NO, ARRANGE CALLBACK OR THANK IF REFUSED]

(QC) Do you or any members of your immediate family make purchasing decisions about food for COMMERCIAL PURPOSES such as restaurants or other food service businesses? (DO NOT READ LIST)

1 YES
2 NO

[IF QC=1 TERMINATE; OTHERWISE CONTINUE]

FARMERS' MARKETS

(Qfm2) How much do you know about Farmers' Markets, that is, a place or space which is open on a regular scheduled basis, where one can buy fresh fruits and vegetables, bedding plants and flowers, herbs, honey, meat and other farm products, including processed food like jams, pies and sausages, from farmers and growers who sell at stalls or tables there. Overall would you say you: (READ LIST)

5 Know a lot about them
4 Know something about them
3 Know a little about them
2 Have heard of but know nothing about them
1 or, You have never heard of them
9 DO NOT READ: DON'T KNOW/REFUSED

[IF Qfm2=1, SKIP TO CSA/BOX PROGRAM Qcsa1; OTHERWISE CONTINUE]

(Qfm3) In the past 12 months, that is, between September 2011 and August 2012, which includes last fall and winter and this summer, did you or any member of your household PURCHASE products other than crafts from a farmers' market in Alberta? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW/REFUSED

[IF QFM3=2 SKIP TO QFM11, IF QFM3=9 SKIP TO CSA/BOX PROGRAM Qcsa1; OTHERWISE CONTINUE]

(Qfm3b) In the past 12 months, did you purchase from a farmers' market: READ LIST

Qfm3b.1 Close to your home?
Qfm3b.2 In your city or town, but not close to home?
Qfm3b.3 While you were on pleasure trip elsewhere in Alberta?
RECORD 1=YES 2=NO 9=DON'T KNOW/NOT SURE
AT LEAST ONE MUST BE YES

(Qfm4) Did you purchase from a farmers' market in the fall, from September to October last year, in winter from November to April, or in summer, from May to August this year, or in more than one season? (DO NOT READ LIST)(IF MORE THAN ONE SEASON PROBE: Which seasons?)

0 FALL
1 SUMMER
2 WINTER
3 ALL 3
4 FALL AND SUMMER
5 FALL AND WINTER
6 SUMMER AND WINTER
9 DON'T KNOW/REFUSED

[QFM4=0, 3, 4, 5 GO TO QFM4A]
[QFM4=1 SKIP TO QFM5A]
[QFM4=2 OR 6, SKIP TO QFM6A]
[QFM4=9 SKIP TO CSA/BOX PROGRAM Qcsa1]

(Qfm4a) In the FALL, from September to October last year, how many times did you and members of your household purchase products from a farmers' market in Alberta? (RECORD NUMBER)

________ # Times last fall **RANGE=1-98**

(Qfm4b) Please think back to the LAST visit you made to a farmers' market in Alberta last FALL. How much did you and members of your household spend? Please do not include purchases of crafts. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON THE LAST FALL VISIT **RANGE $1-9998**

(Qfm4c) How much of this amount was spent on FOOD grown or made in Alberta. Please exclude any food from BC or elsewhere, and any non-food items. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY

___________ $ SPENT ON ALBERTA FOOD **RANGE $0 TO Qfm4b**

[IF QFM4= 0 (FALL ONLY), SKIP TO QFM7]
[IF QFM4= 3 OR 5 (ALL 3, FALL+WINTER), GO TO QFM6A]
[IF QFM4= 4 (FALL+SUMMER), SKIP TO QFM5A]

(Qfm6a) Last WINTER, from November to April, how many times did you and members of your household purchase products from a farmers' market in Alberta? (RECORD NUMBER)

________ # TIMES LAST WINTER **RANGE=1-98**

(Qfm6b) Please think back to the LAST visit you made to a farmers' market in Alberta last WINTER. How much did you and members of your household spend? Please do not include purchases of crafts. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON THE LAST WINTER VISIT **RANGE $1-9998**

(Qfm6c) How much of this amount was spent on FOOD grown or made in Alberta. Please exclude any food from BC or elsewhere, and any non-food items. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON ALBERTA FOOD **RANGE $0 TO Qfm6b**

[IF QFM4= 2 OR 5 (WINTER ONLY, FALL+WINTER), SKIP TO QFM7]
[IF QFM4= 3 OR 6 (ALL 3, SUMMER+WINTER), GO TO QFM5A]

(Qfm5a) In SUMMER, from May to August this year, how many times did you and members of your household purchase products from a farmers' market in Alberta? (RECORD NUMBER)

________ # TIMES LAST SUMMER **RANGE=1-98**

(Qfm5b) Please think back to the LAST visit you made to a farmers' market in Alberta this SUMMER. How much did you and members of your household spend? Please do not include purchases of crafts. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON THE LAST SUMMER VISIT **RANGE $1-9998**

(Qfm5c) How much of this amount was spent on FOOD grown or made in Alberta. Please exclude any food from BC or elsewhere, and any non-food items. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON ALBERTA FOOD **RANGE $0 TO Qfm5b**

(Qfm7) IN THE NEXT 12 MONTHS, do you expect that you and members of your household will spend more, less or the same as last year on purchases from farmers' markets in Alberta? (DO NOT READ LIST)

1 MORE
2 LESS
3 SAME
9 DON'T KNOW/REFUSED

[IF QFM7=1 GO TO QFM8A]
[IF QFM7=2 GO TO QFM8B]
[IF QFM7=3 OR 9, SKIP TO CSA/BOX PROGRAM Qcsa1]

(Qfm8a) Will that be because you will go more often, or because you'll spend more per visit, or both? (DO NOT READ LIST)

01 GO MORE OFTEN
02 SPEND MORE PER VISIT
03 BOTH MORE
99 DON'T KNOW/REFUSED

[IF Qfm8a=01 OR 03, GO TO QFM9A]
[IF Qfm8a=02, SKIP TO Qfm9b IF VISITED IN FALL or SUMMER (Qfm4=0,1,3,4,5,6) or SKIP TO Qfm10b IF VISITED ONLY IN WINTER (Qfm4=2)]
[IF=99 SKIP TO CSA/BOX PROGRAM Qcsa1]

(Qfm8b) Will that be because you will go less often, or because you'll spend less per visit, or both? (DO NOT READ LIST)

04 GO LESS OFTEN
05 SPEND LESS PER VISIT
06 BOTH LESS
99 DON'T KNOW/REFUSED

[IF Qfm8b=04 OR 06, GO TO QFM9A]
[IF Qfm8b=05, SKIP TO Qfm9b IF VISITED IN FALL or SUMMER (Qfm4=0,1,3,4,5,6) or SKIP TO Qfm10b IF VISITED ONLY IN WINTER (Qfm4=2)]
[IF=99 SKIP TO CSA/BOX PROGRAM Qcsa1]

(Qfm9a) You and members of your household made … **[INSERT ANSWER TOTAL FOR QFM4A PLUS QFM5A, OR '0']** visits to a farmers' market last FALL and this SUMMER. How many times do you think you will go next summer and fall, between May and October 2013? (RECORD NUMBER. GET BEST ESTIMATE IF UNSURE)

______TOTAL EXPECTED VISITS NEXT SUMMER/FALL

[IF '0' IN QFM9A, SKIP TO QFM10A]
[IF QFM8a/b=01 OR 04, SKIP TO QFM10A]
[IF QFM8a/b=03 OR 06, GO TO QFM9B]

(Qfm9b) How much … **[INSERT 'MORE/LESS' ANSWER IN FM7]** do you think you and members of your household will spend PER VISIT next SUMMER and FALL? (RECORD IN $, % OR MULTIPLES. RECORD ONLY ONE ANSWER)

_______________ % MORE/LESS PER VISIT
_______________ $ MORE/LESS PER VISIT
_______________ x MORE/LESS PER VISIT

[IF QFM8a/b=03 OR 06, GO TO QFM10A]
[IF QFM8a/b=02 OR 05 AND VISITED IN WINTER AS WELL (QFM4=3,5 OR 6), SKIP TO QFM10B; OTHERWISE SKIP TO CSA/BOX PROGRAM Qcsa1]

(Qfm10a) You and members of your household made … **[INSERT ANSWER FROM QFM6A, OR '0']** visits to a farmers' market last WINTER. How many times do you think you will go this winter, between November and April? (RECORD NUMBER)

______TOTAL EXPECTED VISITS THIS WINTER

[IF '0' IN QFM10A, SKIP TO CSA/BOX PROGRAM Qcsa1]
[IF QFM8a/b= 01 OR 04, SKIP TO CSA/BOX PROGRAM Qcsa1]
[IF QFM8a/b= 03 OR 06, GO TO QFM10B]

(Qfm10b) How much … **[INSERT 'MORE/LESS' ANSWER IN QFM7]** do you think you and members of your household will spend PER VISIT this WINTER? [RECORD IN $, % OR MULTIPLES. RECORD ONLY ONE ANSWER]

_______________ % MORE/LESS PER VISIT
_______________ $ MORE/LESS PER VISIT
_______________ x MORE/LESS PER VISIT

[SKIP TO CSA/BOX PROGRAM Qcsa1]

(Qfm11) If 0 means 'no chance' and 10 means 'certain or almost certain', what number would you choose between 0 and 10 to describe how likely you and members of your household would be to PURCHASE products other than crafts at a farmers' market in Alberta in the next 12 months? (DO NOT READ LIST)

NO CHANCE										CERTAIN/ALMOST CERTAIN
0	1	2	3	4	5	6	7	8	9	10

[IF "0-5" OR 99, SKIP TO CSA/BOX PROGRAM Qcsa1; OTHERWISE CONTINUE]

(Qfm12) In the next 12 months, how many times do you think you and members of your household will PURCHASE products at a farmers' market in Alberta? (RECORD NUMBER)

________ # TIMES

[GO TO CSA/BOX PROGRAM Qcsa1]

CSA (COMMUNITY SUPPORTED AGRICULTURE OR COMMUNITY SHARED AGRICULTURE)/BOX PROGRAM

(Qcsa1) How much do you know about CSA or Box Programs. CSA means Community Supported Agriculture or Community Shared Agriculture. In both CSAs and Box Programs, households purchase a subscription to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products, every week. Overall would you say you: (READ LIST)

INTERVIEWER: IF RESPONDENT KNOWS ONLY ONE TYPE (CSA or Box Program), RATE THAT ONE. IF RESPONDENT KNOWS BOTH AND WOULD RATE THEM DIFFERENTLY, ASK THEM TO CHOOSE THE ONE THEY KNOW MOST ABOUT.

5 Know a lot about them
4 Know something about them
3 Know a little about them
2 Have heard of but know nothing about them
1 or, You have never heard of them?
9 DO NOT READ: DON'T KNOW/REFUSED

[IF Qcsa1=1 SKIP TO FARM RETAIL Qfd13, OTHERWISE CONTINUE]

(Qcsa2) In the past 12 months, that is, between September 2011 and August 2012, did you or any member of your household subscribe to a CSA or Box Program in Alberta? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW/REFUSED

[IF Qcsa2=2 SKIP TO Qcsa6; IF Qcsa2=9 SKIP TO FARM RETAIL Qfd13; OTHERWISE CONTINUE]

(Qcsa3) How much did you spend on the CSA or Box Program in Alberta in the past 12 months?

___________ $ SPENT IN LAST 12 MONTHS **RANGE $1-9998**

(Qcsa3b) How much of this amount was spent on food grown or made in Alberta. Please exclude any food from BC or elsewhere. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON ALBERTA FOOD **RANGE $0 TO Qcsa2b**

(Qcsa4) What was the name of the farm or program that you subscribed to? And where is it located? (ASK RESPONDENT TO SPELL AND TYPE IN)

____________ Farm/program name ____________ Location (City/Town)
99 DON'T KNOW 99 DON'T KNOW

(Qcsa5) Do you expect to continue to subscribe to a CSA or Box Program next year? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW/REFUSED

[SKIP TO FARM RETAIL Qfd13]

(Qcsa6) If 0 means 'no chance' and 10 means 'certain or almost certain', what number would you choose between 0 and 10 to describe how likely you and members of your household would be to SUBSCRIBE to a CSA or Box Program in Alberta in the next 12 months? (DO NOT READ LIST)

NO CHANCE CERTAIN/ALMOST CERTAIN
0 1 2 3 4 5 6 7 8 9 10

[GO TO FARM RETAIL Qfd13]

FARM RETAIL

(Qfd13) How much do you know about Farm Retail purchasing, that is, buying products like fresh fruit and vegetables, flowers, bedding plants and nursery stock, herbs, meat and other farm products, including wine, honey, jams, pies and sausages, at a farm or ranch gate, a farm or ranch store or stand, a roadside stall, a greenhouse ON A FARM, a U-Pick farm, or by Internet or mail from a farm. **[IF Qcsa1>=2 READ: Farm Retail does not include CSAs or Box Programs.]** Overall would you say you: (READ LIST)

5	Know a lot about them
4	Know something about them
3	Know a little about them
2	Have heard of but know nothing about them
1	or, You have never heard of them
9	DO NOT READ: DON'T KNOW/REFUSED

[IF Qfd13=1 SKIP TO FARM RELATIONSHIPS; OTHERWISE CONTINUE]

(Qfd14) In the past 12 months, that is, between September 2011 and August 2012, which includes last fall and winter and this summer, did you or any member of your household PURCHASE these types of agriculture or food products directly from a farm in Alberta? (DO NOT READ LIST)

1	YES
2	NO
9	DON'T KNOW/REFUSED

[IF Qfd14=2 SKIP TO QFD22, IF Qfd14=9 SKIP TO FARM RELATIONSHIPS; OTHERWISE CONTINUE]

(Qfd15) Was that in the fall, from September to October last year, in winter from November to April, or in summer, from May to August this year, or in more than one season? (DO NOT READ LIST) (IF MORE THAN ONE SEASON PROBE: Which seasons?)

0	FALL
1	SUMMER
2	WINTER
3	ALL 3
4	FALL AND SUMMER
5	FALL AND WINTER
6	SUMMER AND WINTER
9	DON'T KNOW/REFUSED

[IF QFD15=0, 3, 4, 5 GO TO QFD15A]
[IF QFD15=1 SKIP TO QFD16A]
[IF QFD15=2 OR 6, SKIP TO QFD17A]
[IF QFD15=9 SKIP TO FARM RELATIONSHIPS]

(Qfd15a) In the FALL, from September to October last year, how many times did you and members of your household purchase agriculture or food products directly from a farm in Alberta? (RECORD NUMBER)

________ # TIMES LAST FALL **RANGE=1-98**

(Qfd15b) Please think back to the LAST purchase you made directly from a farm in Alberta last FALL. How much did you and members of your household spend? Please do not include purchases of crafts. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON THE LAST FALL VISIT **RANGE $1-9998**

(Qfd15c) How much of this amount was spent on FOOD grown or made in Alberta. Please exclude any food from BC or elsewhere, and any non-food items. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON ALBERTA FOOD **RANGE $0 TO Qfd15b**

[IF QFD15= 0 (FALL ONLY), SKIP TO QFD18]
[IF QFD15= 3 OR 5 (ALL 3, FALL+WINTER), GO TO QFD17A]
[IF QFD15= 4 (FALL+SUMMER), SKIP TO QFD16A]

(Qfd17a) Last WINTER, from November to April, how many times did you and members of your household purchase agriculture or food products directly from a farm in Alberta? (RECORD NUMBER)

________ # TIMES LAST WINTER **RANGE=1-98**

(Qfd17b) Please think back to the LAST purchase you made directly from a farm in Alberta last WINTER. How much did you and members of your household spend? Please do not include purchases of crafts. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON THE LAST WINTER VISIT **RANGE $1-9998**

(Qfd17c) How much of this amount was spent on FOOD grown or made in Alberta. Please exclude any food from BC or elsewhere, and any non-food items. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON ALBERTA FOOD **RANGE $0 TO Qfd17b**

[IF QFD15= 2 OR 5 (WINTER ONLY, FALL+WINTER), SKIP TO QFD18]
[IF QFD15= 3 OR 6 (ALL 3, SUMMER+WINTER), GO TO QFD17A]

(Qfd16a) In SUMMER, from May to August this year, how many times did you and members of your household purchase agriculture or food products directly from a farm in Alberta? (RECORD NUMBER. GET BEST ESTIMATE IF UNSURE)

________ # TIMES LAST SUMMER **RANGE=1-98**

(Qfd16b) Please think back to the LAST purchase you made directly from a farm in Alberta this SUMMER. How much did you and members of your household spend? Please do not include purchases of crafts. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON THE LAST SUMMER VISIT **RANGE $1-9998**

(Qfd16c) How much of this amount was spent on FOOD grown or made in Alberta. Please exclude any food from BC or elsewhere, and any non-food items. (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ SPENT ON ALBERTA FOOD **RANGE $0 TO Qfd16b**

(Qfd18) IN THE NEXT 12 MONTHS, do you expect that you and members of your household will spend more, less or the same as last year, on direct purchases from farms in Alberta? (DO NOT READ LIST)

1 MORE
2 LESS
3 SAME
9 DON'T KNOW/REFUSED

[IF QFD18=1 GO TO QFD19A]
[IF QFD18=2 GO TO QFD19B]
[IF QFD18=3 OR 9, SKIP TO FARM RELATIONSHIPS]

(Qfd19a) Will that be because you will go more often, or because you'll spend more per visit, or both? (DO NOT READ LIST)

01 GO MORE OFTEN
02 SPEND MORE PER VISIT
03 BOTH MORE
99 DON'T KNOW/REFUSED

[IF QFD19A=01 OR 03, GO TO QFD20A]
[IF QFD19A=02, SKIP TO QFD20B IF VISITED IN FALL OR SUMMER (QFD15=0,1,3,4,5,6) OR SKIP TO QFD21B IF VISITED ONLY IN WINTER (QFD15=2)].
[IF QFD19A=99 SKIP TO FARM RELATIONSHIPS]

(Qfd19b) Will that be because you will go less often, or because you'll spend less per visit, or both? (DO NOT READ LIST)

04 GO LESS OFTEN
05 SPEND LESS PER VISIT
06 BOTH LESS
99 DON'T KNOW/REFUSED

[IF QFD19B=04 OR 06, GO TO QFD20A]
[IF QFD19B=05, SKIP TO QFD20B IF VISITED IN FALL OR SUMMER (QFD15=0,1,3,4,5,6) OR SKIP TO QFD21B IF VISITED ONLY IN WINTER (QFD15=2)].
[IF QFD19B=99 SKIP TO FARM RELATIONSHIPS]

(Qfd20a) You and members of your household made … **[INSERT ANSWER TOTAL FOR QFD15A PLUS QFD16A, OR '0']** purchases directly from a farm last FALL and this SUMMER. How many times do you think you will go next summer and fall, between May and October 2013? (RECORD NUMBER)

______TOTAL EXPECTED VISITS NEXT SUMMER/FALL

[IF '0' IN QFD20A, SKIP TO QFD21A]
[IF QFD19A/B = 01 OR 04, SKIP TO QFD21A]
[IF QFD19A/B = 03 OR 06, GO TO QFD20B]

(Qfd20b) How much … **[INSERT 'MORE/LESS' ANSWER IN Qfd19a/b]** do you think you and members of your household will spend PER VISIT next SUMMER and FALL? (WRITE IN $, % OR MULTIPLES. RECORD ONLY <u>ONE</u> ANSWER)

_______________ % MORE/LESS PER VISIT
_______________ $ MORE/LESS PER VISIT
_______________ x MORE/LESS PER VISIT

[IF QFD19A/B =03 OR 06, GO TO QFD21A]
[IF QFD19A/B =02 OR 05 AND VISITED IN WINTER AS WELL (QFD15=3,5 OR 6), SKIP TO QFD21B; ELSE SKIP TO FARM RELATIONSHIPS]

(Qfd21a) You and members of your household made … **[ANSWER IN Qfd17a, OR '0']** purchases directly from a farm last WINTER. How many times do you think you will go this winter, between November and April? (RECORD NUMBER)

______TOTAL EXPECTED VISITS THIS WINTER

[IF '0' IN QFD21A, SKIP TO FARM RELATIONSHIPS]
[IF QFD19a/b = 01 OR 04, SKIP TO FARM RELATIONSHIPS]
[IF QFD19a/b = 03 OR 06, GO TO FD21B]

(Qfd21b) How much … **[INSERT 'MORE/LESS' ANSWER IN Qfd19a/b]** do you think you and members of your household will spend PER VISIT this WINTER? (WRITE IN $, % OR MULTIPLES (X). RECORD ONLY ONE ANSWER)

_______________ % MORE/LESS PER VISIT
_______________ $ MORE/LESS PER VISIT
_______________ x MORE/LESS PER VISIT

[SKIP TO FARM RELATIONSHIPS]

(Qfd22) If 0 means 'no chance' and 10 means 'certain or almost certain', what number would you choose between 0 and 10 to describe how likely you and members of your household would be to PURCHASE these types of agriculture or food products directly from a farm in Alberta in the next 12 months? (DO NOT READ LIST)

NO CHANCE CERTAIN/ALMOST CERTAIN
0 1 2 3 4 5 6 7 8 9 10

[IF "0-5" OR 99, SKIP TO FARM RELATIONSHIPS; OTHERWISE CONTINUE]

(Qfd23) In the next 12 months, how many times do you think you and members of your household will PURCHASE agriculture or food products directly from a farm in Alberta? (RECORD NUMBER)

________ # Times

[GO TO FARM RELATIONSHIPS]

FARM RELATIONSHIPS

IF PURCHASED FROM A FARMERS' MARKET (Qfm3=1) OR A CSA/BOX PROGRAM (Qcsa2=1) OR FARM RETAIL (Qfd14=1), ASK Qlf1a-d; OTHERWISE SKIP TO RESTAURANTS Qr1:

(Qlf1a) Thinking now of the farms that you buy from, do/did you …? READ
[RECORD EACH ANSWER AS 1=YES/YES ALL/MOST FARMS, 2=YES SOME/A FEW FARMS, 3=NO OR 9=DON'T KNOW/NOT SURE]
[DO NOT RANDOMIZE ORDER]

Qlf1a.1	Know their names
Qlf1a.2	Follow the progress of crops or livestock on the farms, or the dates of their events
Qlf1a.3	Know something about the families and the histories of the farms
Qlf1a.4	Know what makes their products special compared to food in a store
Qlf1a.5	Know how the products are grown, raised or made on the farms
Qlf1a.6	Visit the farms to see for yourself how their products are grown or raised
Qlf1a.7	Participate in a special event on the farms in the past 12 months
Qlf1a.8	Talk to the farmers about your needs or make suggestions, such as asking for a new crop or product, or a change to their production methods

[IF LF1A.2=1 OR 2, GO TO QLF1B; OTHERWISE SKIP TO QLF1C]

(Qlf1b) Which of the following forms of contact do you use with the farms that you buy from? (READ LIST)
[RECORD EACH ANSWER AS 1=YES, 2=NO OR 9=DON'T KNOW]
[DO NOT RANDOMIZE ORDER]

- TELEPHONE
- E-MAIL
- MAIL
- INTERNET WEBSITE
- BLOG
- FACEBOOK
- TWITTER
- AN APP
- IN PERSON
- READ DISPLAYS OR LEAFLETS
- ANOTHER FORM OF CONTACT? (SPECIFY)

(Qlf1c) Which ONE of the following forms of contact would you MOST prefer to use to keep up to date with the activities and events at the farms that you buy from? (READ LIST)
(Qlf1d) And which would be your second preference? (READ LIST ONLY IF NEEDED)

[DO NOT RANDOMIZE ORDER]

1	TELEPHONE
2	E-MAIL
3	MAIL
4	INTERNET WEBSITE
5	BLOG
6	FACEBOOK
7	TWITTER
8	AN APP
9	IN PERSON
10	READ DISPLAYS OR LEAFLETS
11	OR ANOTHER FORM OF CONTACT? (SPECIFY)
99	DO NOT READ: NONE/DO NOT WANT TO FOLLOW FARMS

[GO TO RESTAURANTS Qr1]

RESTAURANTS

(Qr1) In the past 12 months, that is, between September 2011 and August 2012, did you or any member of your household PURCHASE food at a restaurant, hotel restaurant, diner, grill, pub, bistro, café, tea house, food truck or other eating establishment? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW/REFUSED

[IF QR1=2 OR 9 SKIP TO ALBERTA GROWN OR MADE FOOD; OTHERWISE CONTINUE]

(Qr2a) In the past 12 months, how many times did you and members of your household PURCHASE food at a restaurant or other type of eating establishment in Alberta? (RECORD NUMBER)

________ # Times in last 12 months (all restaurants)
RANGE=1-998

(Qr2b) Please think back to the LAST visit you made to a restaurant or other type of eating establishment in Alberta. How much did you and members of your household spend on food? (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ Spent on last visit (all restaurants)
RANGE $1-9998

(Qr3) In the past 12 months, did you or any member of your household deliberately choose to eat at a restaurant or other type of eating establishment in Alberta specifically because it served food prepared from ingredients that are grown or made in Alberta? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW

[IF QR3=2 OR 9, SKIP TO Qr6; OTHERWISE CONTINUE]

(Qr4a) In the past 12 months, how many times did you and members of your household choose to eat at a restaurant or other type of eating establishment specifically because it served food prepared from ingredients that are grown or made in Alberta? (RECORD NUMBER)

________ # Times in last 12 months (Alberta ingredients)
RANGE=1-998

(Qr4b) Please think back to the LAST visit you made to a restaurant or other type of eating establishment specifically because it served food prepared from ingredients that are grown or made in Alberta. How much did you and members of your household spend? (ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY)

___________ $ Spent on the last visit (Alberta ingredients)
RANGE $1-9998

(Qr5) What was the name of the last restaurant or eating establishment you chose to eat at specifically for food prepared from ingredients that are grown or made in Alberta? PROBE: And where is … located? (ASK RESPONDENT TO SPELL AND TYPE IN)

____________ Restaurant name ____________ Location (City/Town)
99 DON'T KNOW 99 DON'T KNOW

(Qr6) Have you heard of a program to promote restaurants that serve food prepared from ingredients that are grown or made in Alberta, called "Dine Alberta"? (DO NOT READ LIST)

1 YES
2 NO
9 NOT SURE/DON'T KNOW

[GO TO ALBERTA GROWN OR MADE FOOD]

ALBERTA GROWN OR MADE FOOD

[IF QFM4C OR QFM5C OR QFMQ6C >$0,
OR QCSA3B >$0,
OR QFD15C OR QFD16C OR QFD17C >$0,
OR QR4B >$0,
AUTOPUNCH Qlf2=1 AND GO TO READ BELOW; OTHERWISE SKIP TO Qlf2]

READ: You mentioned earlier that you bought food that was grown or made in Alberta … (**INSERT IF QFM4C OR QFM5C OR QFMQ6C >$0: at a Farmers' market, IF QCSA3B >$0: [and] from a CSA or Box Program, IF QFD15C OR QFD16C OR QFD17C >$0: [and] directly from a farm, IF QR4B >$0: [and] at a restaurant or other eating establishment)** in the past twelve (12) months.
[SKIP TO Qlf3a]

(Qlf2) Did you buy food grown or made in Alberta in the past twelve (12) months? (DO NOT READ LIST)

1 YES
2 NO
9 NOT SURE/DON'T KNOW

[IF Qlf2=1 GO TO Qlf3a]
[IF Qlf2=2 OR 9, SKIP TO Qlf3b]

(Qlf3a) In the next 12 months, do you expect that you will buy more, the same amount or less food grown or made in Alberta? (DO NOT READ LIST)

3 MORE
2 SAME AMOUNT
1 LESS
9 DON'T KNOW

[SKIP TO Qlf4a]

(Qlf3b) In the next 12 months, do you intend to buy food grown or made in Alberta? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW

[SKIP TO Qlf6]

(Q1f4a) Please tell me whether you bought food grown or made in Alberta from the following types of outlets in the past 12 months? (READ LIST)

[IF QFM4C OR QFM5C OR QFMQ6C >$0, AUTOPUNCH Q1f4a.10=1; ELSE AUTOPUNCH 2]
[IF QCSA3B >$0, AUTOPUNCH Q1f4a.11=1; ELSE AUTOPUNCH 2]
[IF QFD15C OR QFD16C OR QFD17C >$0, AUTOPUNCH Q1f4a.12=1; ELSE AUTOPUNCH 2]
[IF QR4B >$0, AUTOPUNCH Q1f4a.13=1; ELSE AUTOPUNCH 2]

[RECORD EACH CATEGORY AS 1=YES, 2=NO OR 9=DON'T KNOW/NOT SURE]
[DO NOT RANDOMIZE]

Q1f4a.1	DRUG STORE like London Drugs, Shoppers Drug Mart or Rexall Drugs
Q1f4a.2	CONVENIENCE STORE for example, Mac's, 7-Eleven, Winks, Reddi Mart, Esso On the Run, Petro Canada Super Stop, Tags Food & Gas [DO NOT READ: others include Husky, Mohawk, Shell, Parkland Fas Gas and Turbo]
Q1f4a.3	CLUB STORE for example, Costco, Real Canadian Wholesale Club, or The Grocery People Warehouse Market (TGP)
Q1f4a.4	ETHNIC GROCERY STORE for example, T&T or another Asian store, The Italian Centre Shop or another Italian store, Turkish, Polish or other ethnicities
Q1f4a.5	SMALL GROCERY STORE for example, Extra Foods, Shop Easy Foods, Super-Valu Foods, Super-A Foods, Bigway Foods, AG Foods or Giant Tiger
Q1f4a.6	SUPERMARKET for example, Superstore, Safeway, Sobeys, Save-On-Foods, IGA, Co-Op, No Frills or a REGULAR Walmart store
Q1f4a.7	MASS MERCHANDISER for example, a Walmart SUPERCENTER, Zellers or Target store
Q1f4a.8	HEALTH FOOD, NATURAL OR ORGANIC FOOD STORE for example, Planet Organic, Amaranth Whole Foods, Blush Lane or Community Natural Foods [DO NOT READ: others include Homegrown Foods, Earth's General Store]
Q1f4a.9	SPECIALTY STORE for example a butcher, a bakery, a deli like Sunterra Market, The Cookbook Company Cooks, Sandy View Farms or Bite Groceteria, a fish or seafood store like Billingsgate Fish Company, or an in-town produce store such as H&W Produce
Q1f4a.10	**FARMERS' MARKET
Q1f4a.11	**CSA (COMMUNITY SUPPORTED AGRICULTURE) OR BOX PROGRAM
Q1f4a.12	**DIRECTLY FROM A FARM OR RANCH for example, at a farm gate, farm store, farm stand, roadside stall, u-pick farm, an on-farm greenhouse or hothouse, or a Hutterite colony
Q1f4a.13	**RESTAURANT, HOTEL RESTAURANT, DINER, GRILL, PUB, BISTRO, CAFÉ, TEA HOUSE OR OTHER EATING ESTABLISHMENT

(Q1f4b) [**READ IF APPLICABLE:** And earlier you said you bought food made or grown in Alberta at … [Farmers' Markets, Farm Retail, CSA, and restaurants.] At what OTHER types of outlets, if any, did you buy food grown or made in Alberta in the past 12 months?

____
__ None

INTERVIEWER: WHERE APPROPRIATE CLASSIFY ANSWER ACCORDING TO Q1f4a AND TELL RESPONDENT WHAT TYPE OF OUTLET IT WAS. WRITE IN OR CHECK BOX FOR 'NONE'.

[SHOW ONLY CATEGORIES CODED '1' IN Qlf4a.1-Qlf4a.13]

(Qlf5) And where did you buy food grown or made in Alberta MOST OFTEN? Was it at …? (READ CAPITALIZED PART OF WHOLE LIST BEFORE RECORDING ONE ANSWER; USE EXAMPLES ONLY IF NECESSARY)

CHANGES TO CAPS FOR Qlf5:

Qlf5a.6 SUPERMARKET for example, Superstore, Safeway, Sobeys, Save-On-Foods, IGA, Co-Op, No Frills or a regular Walmart store

Qlf5a.7 MASS MERCHANDISER for example, a Walmart Supercenter, Zellers or Target store

Qlf5a.13 **RESTAURANT, hotel restaurant, diner, grill, pub, bistro, café, tea house OR OTHER EATING ESTABLISHMENT

[ASK ALL]

(Qlf6) People have different reasons for purchasing or not purchasing food grown or made in Alberta. Using a scale from 0 to 10, to what extent **[Qlf2=1 OR Qlf3b=2 OR 9: DOES/ IF Qlf3b=1: would]** each of the following factors influence YOUR decision to buy, or to not buy, food grown or made in Alberta?

10 means the factor … **[IF Qlf2=1 OR Qlf3b=2 OR 9: presently has/ IF Qlf3b=1: is likely to have]** 'an extremely strong influence on your decision TO buy', 5 means it … [has/is likely to have] 'no influence at all' and 0 means it … **[IF Qlf2=1 OR Qlf3b=2 OR 9: has/ IF Qlf3b=1: is likely to have]** 'an extremely strong influence on your decision to NOT buy'.

How strong an influence does … (READ) have on your decision to buy or to not buy?

[RANDOMIZE ORDER OF PRESENTATION]

Qlf6.1	Freshness of food grown or made in Alberta
Qlf6.2	Taste of food grown or made in Alberta
Qlf6.3	Appearance of food grown or made in Alberta
Qlf6.4	Quality of food grown or made in Alberta
Qlf6.5	Type of food grown or made in Alberta
Qlf6.6	Health benefits of food grown or made in Alberta
Qlf6.7	Nutritional value of food grown or made in Alberta
Qlf6.8	How the food was raised or grown
Qlf6.9	Safety of food grown or made in Alberta
Qlf6.10	Knowing the source of the food
Qlf6.11	Environmental impact of food grown or made in Alberta
Qlf6.12	Impact on your community or region's economy
Qlf6.13	Impact on Alberta's economy
Qlf6.14	Support for Alberta's family farms
Qlf6.15	Price of food grown or made in Alberta
Qlf6.16	How far you have to travel to buy food grown or made in Alberta
Qlf6.17	Reliable supply of food grown or made in Alberta
Qlf6.18	Labeling or signage at place of purchase or on products, showing food is grown or made in Alberta
Qlf6.19	Information on why one should buy, or where to buy food grown or made in Alberta

(Qlf7) Have you heard the term, "Local Food"? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW/NOT SURE

[IF Qlf7=1 GO TO Qlf8; OTHERWISE SKIP TO Qlf9]

(Qlf8) Would you accept food grown or made in Alberta as "Local Food"? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW/NOT SURE

[ASK ALL:]

(Qlf9) Do you or does any member of your household grow food for your own consumption? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW/NOT SURE

(Qlf10) Do you or does any member of your household cook MOST of your meals from scratch? (DO NOT READ LIST)

1 YES
2 NO
9 DON'T KNOW/NOT SURE

[GO TO DEMOGRAPHICS]

DEMOGRAPHICS

READ: Finally, I have a few questions about you and your household that will be used for statistical classification purposes only. Only aggregated responses will be used and published on the Agriculture and Rural Development website.

(Q58) How many people, including yourself and any babies, live in your household?
INTERVIEWER NOTE: DON'T KNOW IS NOT AN ACCEPTABLE RESPONSE

________ NUMBER IN HOUSEHOLD

[IF Q58=1 AUTOPUNCH Q59=5]
(Q59) How old is the youngest child living in your household? (READ LIST)
INTERVIEWER NOTE: DON'T KNOW IS NOT AN ACCEPTABLE RESPONSE

1 Up to 5 years
2 6 to 12 years
3 13 to 17 years
4 18 or older
5 No children in household

[IF AREA=EDMONTON METRO, CALGARY METRO, MAJOR URBAN OR RURAL ASK Q60X]
(Q60X) Do you live on a farm or ranch? (DO NOT READ LIST)
INTERVIEWER NOTE: DON'T KNOW IS NOT AN ACCEPTABLE RESPONSE

1 YES
2 NO

[RECORD CITY/TOWN, CMA, CD ETC. FROM THE TELEPHONE SAMPLE IN DATABASE]

(Q62) Please tell me when I read out your age group (READ LIST)
INTERVIEWER NOTE: DON'T KNOW IS NOT AN ACCEPTABLE RESPONSE

1 18-24
2 25-34
3 35-44
4 45-54
5 55-64
6 65 and over

(Q63) What is the highest level of education you have completed to date: (READ LIST)
INTERVIEWER NOTE: DON'T KNOW IS NOT AN ACCEPTABLE RESPONSE

1 Less than high school
2 Graduated high school
3 Some commercial, technical or vocational college or trade certificate
4 Graduated commercial, technical or vocational college or trade certificate
5 Some university
6 Completed university
7 Post-graduate

(Q64) Which of the following best describes your marital status? Are you: (READ LIST)
INTERVIEWER NOTE: DON'T KNOW IS NOT AN ACCEPTABLE RESPONSE

1 Single, that is, never married
2 Married or living together as a couple
3 Widowed
4 Separated
5 Divorced

(Q65a) Was your TOTAL household income, before taxes and other deductions, under or over $80,000 in 2011? (DO NOT READ LIST)

1 Under $80,000
2 Over $80,000
9 DO NOT READ: DON'T KNOW
10 DO NOT READ: REFUSED

[IF Q65a=1 GO TO Q65b]
[IF Q65a=2 SKIP TO Q65c]

(Q65b) Was it under or over $50,000? (DO NOT READ LIST)

1 Under $50,000
2 Over $50,000
3 DO NOT READ: DON'T KNOW
4 DO NOT READ: REFUSED

[SKIP TO Q66]

(Q65c) Was it under or over $120,000? (DO NOT READ LIST)

1 Under $120,000
2 Over $120,000
7 DO NOT READ: DON'T KNOW
8 DO NOT READ: REFUSED

(Q66) RECORD GENDER BY OBSERVATION (DO NOT READ LIST)
INTERVIEWER NOTE: DON'T KNOW IS NOT AN ACCEPTABLE RESPONSE

1 MALE
2 FEMALE

READ: On behalf of Infact Research and the Government of Alberta, thank you for taking the time to answer these questions to improve their services to you.