Report on local food demand in the Calgary region

Alberta Agriculture and Forestry

August 2015
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Executive summary

INTRODUCTION

This is the first regional study to be conducted about demand for local food in Alberta. It focused on Census District 6, termed the Calgary Region, which includes the City of Calgary and the immediately adjacent Region, made up by Rocky View County, Mountain View County and the District of Foothills, including Airdrie, Cochrane, Okotoks, High River, Olds and other towns and villages in the Region.

Two focus groups provided qualitative insight into consumer perspectives and allowed testing of various question alternatives to meet the study’s objectives. They were followed by a quantitative online panel survey completed by over 1,000 food purchasers aged 18 years and older and resident in the Calgary Region. The sample was quota controlled and weighted by age and place of residence.

The 15 food market channels listed below were described in detail to respondents. All Direct to Intermediated (D2I) and Direct to Consumer (D2C) channels were the subject of in-depth questioning, while the Direct to Mainstream (D2M) channels completed the local food shopping picture.

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AWARENESS AND FAMILIARITY

Complete or close to saturation levels of market awareness were found for all D2M channels, for farmers’ markets and restaurants or other eating establishments (90% to 100% recognition). On a scale ranging from “know a lot” to “know nothing, have only heard of them,” respondents were most familiar with restaurants or other eating establishments (where most claimed to know “a lot” or “something” about them) followed by farmers’ markets, where the majority knew “something” or “a little” about them.

Next highest in awareness were the remaining D2I channels, achieving 80% to 89% recognition levels, with the exception of small grocery stores (usually found in less urban locations) at 71%. Familiarity with these channels was considerably lower than for restaurants or other eating establishments. Know “a little” and “something” were the predominant responses, in that order.
Among the remaining D2C channels, farm retail (directly purchased from a farm or ranch) was best known at 54%. Fewer than 25% were aware of the other D2C channels. Familiarity was limited for all these channels, with very few respondents claiming to know “a lot” about them.

SHOPPING CHANNELS

For the purpose of this study local food was defined as “food grown or made in Alberta.”

In the past 12 months the most popular local food supply channels were supermarkets (88% of all respondents), farmers’ markets (67%) and restaurants or other eating establishments (66%). Most notable was the higher certainty of farmers’ market purchasers compared to the other leading channels: four-out-of-five were quite sure they had bought local food there, compared to two-thirds of supermarket and half the restaurant purchasers (the balance “assumed” they had). The results speak to the ease of identifying local origin through various market channels.

Origin was less well understood in the remaining D2M channels than in supermarkets, suggesting that recent supermarket efforts at origin identification have had an effect in reducing uncertainty. Customers at specialty stores and health food, organic or natural food stores also showed higher certainty about food origin (two-thirds).

Although used by only a small proportion of respondents, buyers of local food at the other D2C channels were as certain about its origin as farmers’ market purchasers.

Because most people shop at multiple outlets for food, factor analysis was used to identify the most popular channel mixes and respondents were allocated to one based on their highest score. Five segments were identified which included the following channels:

- **Mainstream**: Supermarkets, mass merchandisers and club stores in particular, also restaurants or other eating establishments.
- **Specialized**: Health food, natural or organic food stores and specialty stores, also farmers’ markets and online-only suppliers.
- **Rural**: Farm retail, farmers’ markets and small grocery stores.
- **Fringe**: Drug stores and convenience stores, also ethnic grocery stores.
- **Alternative**: Buying clubs and CSA or farm box programs.
GROWTH POTENTIAL

Future intentions for purchasing local food at the D2I and D2C outlets were assessed in various ways depending on whether or not the respondent already purchased local food in the channel or had just heard of the channel.

In combination, these results indicated that farmers’ markets have the strongest growth opportunity in the near future, provided mostly by existing customers buying more local food, supplemented by existing customers who did not buy local food there in the past 12 months.

Above average levels of growth in local food purchases for CSA or farm box programs and health food, organic or natural food stores may also be expected from their current local food customer bases. Specialty stores and farm retail have strong opportunities to convert existing shoppers to local food buyers. New customers are most likely to be gained by D2C channels other than farmers’ markets once channel awareness has been gained.

LOCAL FOODS PURCHASED AND WANTED

The 95% of respondents who bought local food described, on an unaided basis, the types of foods they had purchased most often in the past 12 months. The top ten items are shown in the list alongside and included mainly produce and meat. Bread was the only value-added item in the list.

Almost half of the total number of items reported (47%) were different types of produce, with three-quarters being vegetables. The next highest category was meats (17%), led by beef. Products made of grain (mainly breads), poultry (especially chicken), dairy and dairy products and poultry products (eggs) were each mentioned by 5% to 7%

Unmet demand for local food was elicited within a number of categories. Three-quarters of the current and potential local food purchasers named at least one local food item they would like to see, or see more of, while the rest wanted nothing more than what was available.

Categories mentioned by half or more respondents included:

- Meats, where beef led the list, followed by bison and lamb. This suggested that there was considerable room to diversify what is offered.
- Dairy and dairy products, with greater emphasis being placed on cheese, yogurt and butter than at present.
- Poultry, particularly chicken, but also turkey.
Produce, where there was greater demand for fruits, especially berries of all types, compared to the current situation. Fresh products were specified most often.

Considerable detail on the remaining categories may be found in the report.

NEEDS FROM LOCAL FOOD BY MARKET CHANNEL

Three sets of questions examined purchaser needs from local food. One dealt with production attributes (asked from a consumer perspective, using consumer terminology), another with non-production motivators for purchasing and the third with barriers to purchase. The questions each included between 14 and 18 options. Respondents were asked to select five production attributes and rank their top three motivators and barriers. The top three items in each group are listed alongside.

A list like this oversimplifies the process used by people to make choices; their behaviour is usually driven by an internally consistent set of needs and values, acting together. Factor analysis identified such groups for each of the questions individually. For this summary, the five shopping channel segments are described in association with the production, motivation and barrier segments, perceptions of food and agriculture issues and demographic profiles.

Mainstream shoppers, who favoured supermarkets, mass merchandisers and club stores, as well as restaurants and other eating establishments, appeared to be relatively unconcerned about local food, often lacking interest in diversifying local food purchases. They were also less likely to identify meat and eggs as locally produced items that they currently purchase.

This group was more likely than average to be found in the “Less is More” production segment. The segment identified less or minimally processed products and less packaging as their key drivers. They had little interest in natural farming practices or being certified organic, the idea of authenticity, knowing where the food was grown or transparency of production practices. As a result Mainstream shoppers were much less likely to be found in the production segment “Certified Organic with a Complete List of Ingredients” or in the “Producer Relations” motivation segment.

Mainstream shoppers were also overrepresented in the “Protect the World” production segment. This group particularly valued knowing that animals were humanely raised and that the environment is protected.
“Economic Benefits” were frequently reported as a motivator for purchasing local food, particularly for the support local food provides to the provincial economy, also to Alberta’s small family farms. This group had confidence in the local food system.

Mainstream shoppers were strongly represented in the immersive shopping experience reported by the “Sensory Stimulus” motivation segment, representing people who enjoyed the atmosphere or experience of shopping for local food and who liked to find different, specialty or ethnic foods. One has to question whether their answers represented shopping for local food at mainstream outlets or the mystique of local food (or farmers’ markets), rather than action to find it on a regular basis.

“Access” was a major barrier to purchasing local food, with distance or time to get to a vendor, limited or inconvenient hours of operation and transportation costs being the main hurdles. It is unlikely that these Mainstream shoppers connect local food with the stores where they shop, since this barrier probably does not apply to many of them – again suggesting that local food was associated with other outlets like farmers’ markets.

Mainstream shoppers had below average knowledge about farm operations, disagreeing more often than average that, “I am knowledgeable about Alberta farming practices.”

Demographically, the segment was slightly over-represented among females and was slightly less likely to include respondents with a university degree. In other respects, they resembled the population.

- **Specialized shoppers** were defined particularly by their use of health food, natural or organic food stores and specialty stores, as well as farmers’ markets and online-only suppliers. They purchased local chicken, potatoes and cucumbers more often than other segments. They were more likely than average to mention local items they would like to see more of, especially: eggs, jams, breads and unpasteurized/raw honey.

Patrons of Specialized stores were overrepresented in the “Certified Organic with a Complete List of Ingredients” production segment, where these two items were the major requirements. The segment was interested in knowing where the food originated, probably wanting details relating to the particular farm, farmer and production methods. Transparency of production practices was valued, providing the opportunity to check for themselves, as “no chemicals” was a higher than average choice. This segment rejected such nebulous claims as “high quality” and did not having an automatic trust in local food, evidently preferring to vet products themselves. They were primarily concerned about what was in the food and probably valued the opportunity for one-on-one interactions at Specialized stores.

Specialized shoppers were far less likely to be found in the “Unregulated Organic/Natural” production segment, rejecting uncertified organic or natural farming practices and dependence on government regulation and testing.

“Access” was much less likely to be a barrier to purchasing local food among Specialized shoppers.
Specialized shoppers appear to have a higher disposable income than average. They were more often young couples without children and had a university degree. They had the highest average household income of all shopper segments and were more likely to be Canadian born.

- **Rural shoppers** purchased directly from a farm or ranch, also from farmers’ markets and small grocery stores. Their local purchases were more likely than average to be chicken and meat. They were very likely to identify items they would still like to see produced locally, with eggs, chicken, cheese, sausages made of meat and different flavours of honey standing out in comparison to other shopper segments.

The production segment “Known Provenance” was found somewhat more often among Rural shoppers. Many of the surveyed production options were supported by them, but they especially valued knowing where food was grown or raised. As many were resident in the Region (i.e., outside the City of Calgary), their understanding of food origin was likely more intimate and based on personal relationships with farmers or knowledge of local farms.

That would help to explain an above average trust in local food and an expectation of high quality ingredients, but very low demand for organic certification (often preferring natural farming practices), despite being the group most likely to demand “no preservatives, additives or fillers” and “no chemicals.”

Consistent with the above, Rural shoppers were less likely to embrace the values espoused by the “Protect the World” production segment, who valued knowing that animals were humanely raised, that the environment is protected and that farming and production practices are transparent.

Furthermore, the Rural shopper segment was underrepresented in the “Sensory Stimulus” motivation segment, those who enjoyed the atmosphere or experience of shopping for local food and liked to find different, specialty or ethnic foods.

Finally, Rural channel shoppers were more receptive than average to using recipes provided with new or unusual foods.

Additional defining demographic characteristics of Rural shoppers included a higher than average incidence of males and respondents aged 55-64 years.

- **Fringe shoppers** patronized drug stores and convenience stores in particular, but also ethnic grocery stores. This segment was less likely than average to buy local beef, chicken or corn and more likely to purchase local eggs, meat (type unspecified) and milk. Unmet needs included yogurt and apples. They were less interested than average in local jams and turkey.

Fringe shoppers were overrepresented in the “Unregulated Organic/Natural” production segment. They wanted to know that organic or natural farming practices were being used, even when not certified. Authenticity and not using chemicals were frequent complementary attribute choices. That this segment favoured an informal approach was
further seen in their reservations about the existing system, shown by not valuing government regulation and testing. They were also less interested in seeing lists of ingredients, information about where the food was grown or raised, or about a farm’s production practices.

The Fringe shopper segment was more likely than average to be motivated to buy local food for “Health” reasons, mostly accounted for by their purchase of local food in drug stores. The segment was defined by high loadings on local food having “better nutritional value” and believing that it was “healthier for you.” These self or family-centered respondents were not motivated by such grand ideas as providing benefit to the Alberta economy.

Fringe shoppers were found less in the “Less is More” production attribute segment which valued low consumption behaviour. They were more strongly opposed than average to the statement: “The consumer should be prepared to pay more for local food.” However, the door was opened to increased consumption of local food when supporting the statements, “Alberta can grow much more variety – there is no reason it should come from other countries” and “Alberta farmers don’t know what consumers want.” This was due, in part, to a high proportion of the segment being born and raised outside Canada. Immigrants supported the idea of greater selection, possibly hoping to see more foods from their home countries produced fresh locally.

The immigrant demographic is not insignificant, comprising one-in-four Calgary Region households. This group was open to promotion of local food, seen in their greater support for the idea that, “Individual farms or small groups of Alberta farms should promote directly to the consumer.” In view of their overrepresentation in the Fringe market channels, it was likely that they were cut off, at least to some degree, from existing local food communication efforts.

From a demographic standpoint, Fringe shoppers lived in households that were larger than average, with teenagers present and were more likely to be aged 45-54. Fringe shoppers had the lowest average household income, suggesting that any local food promoted to them needs to be competitively priced, while also promoting the quality attributes described above.

- The Alternative shopper segment was defined by shopping through buying clubs, along with CSA/farm box programs, but not farmers’ markets. This group was distinctive for the large number and many types of local products they purchased, including: fruit in general, potatoes, tomatoes, carrots, apples, onions, cheese and baked goods. Unmet needs were identified for: eggs, turkey, lamb, yogurt, ketchup, pork, salsa, basil, mushrooms, potatoes, relish, oregano, fruit in general, quail, granola bars, rice flour, cornish game hens and kefir. Local items mentioned less often than average as being needed were chicken and milk.

The most important motivator among shoppers at Alternative market channels was “Producer Relations.” This segment particularly favoured the attributes: “have a good relationship with the producers,” “easy to order” and “other” attributes, notably
environmental benefits. They also liked the notion of supporting Alberta’s small family farms and small independent businesses … and rejected taste as a reason for buying local food.

Alternative channel shoppers were less likely to be concerned about “Cost & Seasonality,” where affordability, combined with seasonal availability issues, is a barrier to buying local food.

Alternative shoppers were most likely of all channel segments to live in the City of Calgary, in a family, especially one where the respondent was aged 18-34 years and pre-school aged children were present, or one with adult children over the age 18. It included a higher than average proportion of respondents who were single/never married and had a university education.

EXPERIENCES ON LOCAL FOOD BY MARKET CHANNEL

Expenditure on local food at the 10 D2I and D2C market channels was estimated by asking respondents for their frequency of purchase and average spending on an annual (restaurants or other eating establishments chosen specifically because they use local ingredients, CSA or farm box programs), seasonal (other D2C channels) or quarterly basis (other D2I channels). Annual spending was calculated for each respondent individually and these figures were used to estimate expenditures on local food in the Calgary Region for each of the channels investigated.

Seasonality. The four D2I stores showed very similar patterns of local food purchase, with the highest incidence of shopping occurring in the third quarter. The next highest quarter was the second quarter. The rate of purchase of local food declined in the fourth and subsequently again in the first quarter, most noticeably for specialty stores and small grocery stores, though the changes were small.

Seasonal variation was far more distinct for the D2C channels where many more people shopped in summer than winter.

Purchase frequency. There was only minor variation in purchase frequency by quarter in the D2I stores, with the exception of small grocery stores which peaked in the fourth quarter. Small grocery stores also differed by being visited far more frequently (in all quarters) than the others. This impacted the total annual visits made, with small grocery stores at 14, compared to 10 for health food, organic or natural food stores, followed by restaurants or other eating establishments (nine), ethnic grocery stores (nine) and specialty stores (eight).

Among those shopping at all in a season, average visit frequency for farm retail was similar in both seasons, but far higher in summer for farmers’ markets than in winter. The average number of visits per year to farmers’ markets was seven and for farm retail six.
Spending on local food. The results for the D2I stores showed that while there were minor differences in frequency of purchase, average expenditures did not vary much at all by quarter. On an annual basis, the highest average household spending occurred at ethnic grocery stores ($670). Small grocery stores received $610, health food, organic or natural food stores $457 and specialty stores $390. Median expenditures, however, were lower at $150 to $190. Annual spending at restaurants or other eating establishments chosen specifically because they use local ingredients was $569, with a much higher median ($300) than for the other D2I channels.

Farmers’ market expenditures were similar in each season among those who purchased in the season, with an average annual total of $293 per household (median $170). This was less than for farm retail, where spending was far higher in winter than summer, averaging $575 per annum (median $190).

Market value. Expenditures on local food for the 12 month period April/May 2014 to March/April 2015 were projected based on an estimated 543,000 households in the Calgary Region.

The highest valued market channel was restaurants or other eating establishments chosen for serving local food, at $136 million.

Next highest were farmers’ markets at $106 million.

They were followed by the remaining D2I channels, fairly closely clustered: health food, organic or natural food stores, $92 million; ethnic grocery stores, $87 million; specialty stores and small grocery stores, both at $79 million.

Farm retail was valued at $55 million.

CONCLUSIONS AND RECOMMENDATIONS

The final section of the report outlines potential actions that can be taken to facilitate increased demand for local food, driven by what the consumers revealed about themselves.

Marketing actions should be focused on increasing awareness and familiarity and supporting sources of growth for each channel; also on using purchasing behaviour, psychographics and demographics to describe target audiences, tailor relevant messaging and identify marketing tactics.

Understanding holistic consumer demand for production values can help producers, processors and distributors guide targeted production decisions, while unmet locally produced food needs were summarized.

Other described opportunities were consumer interest in increased knowledge about agriculture and how this should be delivered, as well as potential improvements to the survey.
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Introduction

Infact Research and Consulting Inc. are pleased to provide a report on a quantitative investigation into consumer demand for local food in the Calgary Region. The study was conducted for Alberta Agriculture and Forestry (AF) in collaboration with organizations with an interest in local food in the Calgary Region.

BACKGROUND

AF is working with producers, food processors, and entrepreneurs to capture opportunities for local market expansion through the Explore Local Initiative, providing producers with assistance ranging from information and networking links to webinars and workshops. A growing number of producers are selling local food to Albertans through various Direct to Consumer (D2C) market channels such as farmers’ markets, u-pick, on-farm stores, roadside stands, off site farm stores, community supported agriculture (CSA), food basket programs, grower cooperatives and Direct to Intermediated (D2I) channels such as local restaurants, caterers, wineries and bakeries that source food ingredients direct from Alberta producers.

Infact Research and Consulting Inc. worked closely with a team from AF in 2004 to develop an alternative approach to estimate consumer expenditures made through some of these market channels. Based on focus group testing, a consumer-friendly approach was developed to help respondents provide the most accurate data from which to derive market estimates. The approach was replicated in two further tracking studies (Alberta Agriculture and Rural Development. Alternative Agricultural Markets in Alberta, 2008/2012.)

In 2008, the methodology was extended to include an estimate of spending on local food through the channels investigated that year. Local food was defined as “food grown or made in Alberta,” the same definition used in the present study.

AF would now like to develop a food system assessment at the regional level to increase market awareness and promotion, as well as identify opportunities through a demand and supply analysis. The emphasis of this study was to be placed on D2I channels that had not been investigated previously, in addition to D2C channels.
PURPOSE AND OBJECTIVES OF THE STUDY

This project has provided rich detail for an opportunity assessment in the Calgary Region based on the analysis of the following topics:

1. Consumer awareness, market value, market profiles and the growth potential of ten local food market channels.
2. Top local food items most purchased in the Calgary Region.
3. Gaps in the supply of local food items/attributes in the Calgary Region.
4. Production attributes and other motivators that attract consumers to local food.
5. Barriers to consumer support for local food.
6. Consumer perceptions of food and agriculture issues.

DELIVERABLES

Deliverables for this study were:

- secondary research relating to food trends in the Calgary Region (report may be found in Appendix VI);
- focus groups to identify issues of interest relating to local food and to test alternative approaches to estimating expenditures in a survey;
- an online survey of a representative sample of households in the Calgary Region; and
- a report on the survey results (this document).
Methodology

Geographic coverage

The research conducted was regional in scope. It covered Alberta Census District 6, which was termed the Calgary Region. The area was further split geographically into two parts:

- the City of Calgary; and
- the immediately adjacent Region, made up by Rocky View County, Mountain View County and the District of Foothills, including Airdrie, Cochrane, Okotoks, High River, Olds and other towns and villages in the Region.

The study included two stages: a qualitative enquiry and a quantitative survey.

Qualitative research

As a precursor to developing a quantitative approach to measuring Calgary Region food buyers' attitudes to and purchase of local food from different market channels, qualitative research in the form of focus groups was undertaken.

Two focus groups were held in Calgary. All participants were Internet users (as they would be in an online survey) and responsible for, or had major responsibility for, shopping for food for their households.

Recruiting guidelines were established to ensure that a demographic cross-section of the population would be represented in each focus group. In addition, each participant met criteria relating to local food channel usage. Participants in the second focus group, dubbed “foodies,” were also required to self-identify with multiple terms that might be used for people more involved than average with food. The screener used may be found in Appendix V.

For each focus group, 10 people were recruited for a minimum of eight to participate. In all, 17 people attended the two groups; nine participated in one group, eight in the other. None had ever attended a focus group before. Focus groups were conducted on January 6, 2015 and had the following profile:

<table>
<thead>
<tr>
<th>Age</th>
<th>Gender</th>
<th>Immigrant in household</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34 years</td>
<td>Female 7</td>
<td>Yes 6</td>
</tr>
<tr>
<td>35-44 years</td>
<td>Male 10</td>
<td></td>
</tr>
<tr>
<td>45-54 years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>55-64 years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>65-69 years</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
A diverse range of occupations was represented in the focus groups, covering trades/technical and clerical workers, business owners and professionals, along with a few homemakers and students.

The moderator’s guide that was used to guide the focus group discussions may be viewed in Appendix V. Client representatives viewed the focus groups in progress or on video recordings in order to see real consumers saying what they thought and explaining how they bought local food.

The focus groups provided insight into consumer perspectives and allowed testing of various question alternatives to meet the study’s objectives. These findings drove the attitudinal content and approach to gathering spending information in the survey questionnaire. The findings also resulted in reframing of one of the original study objectives and the addition of another.

A working paper captured the proposed questionnaire, with annotations relating to the rationale for each question based on input from the focus groups and/or other resources.

**Quantitative research**

**SAMPLE SIZE AND DISTRIBUTION**

The quantitative study was conducted with online panel members in the Calgary Region. The online survey methodology yielded a far larger sample size than would have been possible for a randomly selected, interviewer-led telephone survey with the same budget. The larger sample was necessary to allow in-depth behavioural questions to be asked for 10 different market channels, some of which had limited market penetration.

The survey was completed by over 1,000 food purchasers aged 18 years and older who were residents of the Calgary Region. Within this population of panel members, quotas for age, gender and geographic location were imposed.

Seven panels allowed a sample of sufficient size to permit reporting for the less populated Region to be assembled. Fieldwork was carried out by Research Now, with the following panel distribution.

<table>
<thead>
<tr>
<th>Panel</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>AirMiles Canada</td>
<td>50%</td>
</tr>
<tr>
<td>ERI Canada</td>
<td>28%</td>
</tr>
<tr>
<td>Valued Opinions Panel</td>
<td>13%</td>
</tr>
<tr>
<td>Peanut Labs/Social Media</td>
<td>5%</td>
</tr>
<tr>
<td>Vision Critical</td>
<td>1%</td>
</tr>
<tr>
<td>Marketcube</td>
<td>1%</td>
</tr>
<tr>
<td>Paradigm</td>
<td>1%</td>
</tr>
</tbody>
</table>
The survey soft-launched on May 19, 2015 and, after minor modification for clarification of one question, the main survey was conducted between May 21 and June 16, 2015. Reminders were sent out on a targeted basis and new panels added in the last week of the survey. A total of 1,007 usable responses were received by the cut-off date.

The original research design called for 16% of interviews to be conducted in the Region (based on the population proportion reported in Canada Post’s November 2014 household counts). As the combined panels generated only 12% in the Region, the respondents that lived there were weighted to the required proportion.

Age and gender field quotas were set based on the profile of household maintainers in the Calgary CMA, as reported by Statistics Canada in the 2011 National Household Survey (NHS). The final achieved sample distribution was weighted by age to the NHS household maintainer profile.

Gender was not weighted as the achieved distribution was similar to the roughly 40% male to 60% female breakdown obtained in the three Alternative Markets studies mentioned earlier. These studies were used for reference as each was based on a randomly selected telephone sample and similarly composed of food shoppers who could discuss past food purchases and expenditures made by their households.

The number of responses obtained on an unweighted and a weighted basis is outlined in more detail in Appendix I.

**QUESTIONNAIRE AND DATA ANALYSIS**

The median time taken by respondents to complete the survey was 17 minutes, with two-thirds completing in 20 minutes or less. A reader friendly version of the questionnaire is included as Appendix IV.

Open ended responses were reviewed and cleaned.

The survey was analysed using SPSS, an advanced statistical analysis program. All questions were extensively cross-tabulated and segmentation was undertaken where useful insights could be gained. The outputs from the SPSS analysis are provided in a separate volume of tables. Any differences to graphs or tables in this report are due to rounding of the numbers.
APPROACH TO THE REPORT

The findings from the survey are presented in the main body of the report and form its focus. They are supported with insights from the focus groups and comments from the survey respondents where these serve to enhance understanding of the quantitative results.

Results discussed in the quantitative report that differentiate between demographic groups, geographic markets, psychographic groups or other sub-groups of interest, were usually based on differences assessed by statistical tests. These tests were conducted to identify inter-group differences that may be real, but as the online panel survey is not based on a statistically random sample of the total population, typical measures of sample error do not apply. This means one may not say that differences were statistically significant, nor report confidence intervals for any results.

All findings published in this report are based on weighted data. Weighting reduced the total unweighted sample of 1,007 to n=1,001.
Summary of key findings

Awareness of food market channels

Market channel definitions

Consumer oriented explanations of each of the market channels included in this study were shown to respondents. These descriptions were either written in full or could be accessed by hovering over the term 1, depending on the question being asked.

Fifteen food market channels were described as follows to the respondent. Each channel was classified as D2M, D2I or D2C for analysis purposes.

D2M (Direct to Mainstream)
- **DRUG STORE** (like London Drugs, Shoppers Drug Mart or Rexall Drugs)
- **CONVENIENCE STORE** (for example, Mac’s, 7-Eleven, Winks, Reddi Mart, Esso On the Run, Petro Canada Super Stop, Tags Food & Gas, Husky, Mohawk, Shell, Parkland Fas Gas and Turbo)
- **CLUB STORE** (for example, Costco, Real Canadian Wholesale Club, or The Grocery People Warehouse Market)
- **SUPERMARKET** (for example, Co-Op, Superstore, Safeway, Sobeys, Save-On-Foods, IGA, No Frills or a REGULAR Walmart store)
- **MASS MERCHANDISER** (for example, a Walmart SUPERCENTER)

D2I (Direct to Intermediated)
- **ETHNIC GROCERY STORE** (like T&T Supermarket or another Asian store, European, Middle Eastern, Latin, Indian or other ethnic stores)
- **SMALL GROCERY STORE** (like Extra Foods, Bigway Foods or AG Foods)
- **HEALTH FOOD, NATURAL OR ORGANIC FOOD STORE OR MARKET** (like Planet Organic, Amaranth Whole Foods, Blush Lane, Community Natural Foods, Homegrown Foods, Mrs Green’s or Sunnyside Natural Markets)

1. Hovering over a single asterisk (*) in the questionnaire showed respondents the definition of local food. Hovering over a double asterisk (**) allowed respondents to again read the full description of the market channel referred to in the question.
- **SPECIALTY STORE** (a butcher like Second to None Meats, a bakery like Sidewalk Citizen Bakery, a deli like Sunterra Market, The Cookbook Company Cooks, or Bite Groceteria, a fish or seafood store like Blu Seafood Market or an in-town produce store such as Market Produce)

- **RESTAURANT OR OTHER EATING ESTABLISHMENT** (restaurant, hotel restaurant, diner, grill, pub, bistro, café, tea house, food truck or other eating establishment)

**D2C (Direct to Consumer)**

- **ONLINE-ONLY SUPPLIER** (an online-only company that represents a group of farms or combines products from many suppliers (like SPUD, Green Earth Organics or Yuba). They will take your order on the Internet and deliver to you at home or to a convenient central location for pick-up)

- **BUYING CLUB** (a group of people who get together to buy in bulk at a lower cost and then share out the purchases made)

- **CSA OR FARM BOX PROGRAM** (CSA means Community Supported Agriculture or Community Shared Agriculture. In both CSAs and Farm Box Programs, households purchase a subscription ahead of time from a farm or group of farms to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products each week throughout the season)

- **FARMERS’ MARKET** (a place or space with stalls or tables, which is open on a regular scheduled basis, where one can buy food like fresh fruits and vegetables, herbs, honey, meat and other farm products, including processed food like jams, pies and sausages)

- **DIRECTLY FROM A FARM OR RANCH** (you buy food at a farm or ranch gate, a farm or ranch store, a roadside stand, stall or truck, a U-Pick farm or a Hutterite colony. Food could include fresh fruits and vegetables, herbs, honey, meat and other farm products, including processed food like wine, honey, jams, pies and sausages)
MARKET CHANNEL AWARENESS

The proportion of respondents who had heard of each market channel is shown in Chart 1.

The results show that while D2M channels were almost universally known and D2I channels were very widely known (with small grocery stores less so, probably due to being more commonly located outside large cities), most D2C market channels were far less well known. The only exception to this was farmers’ markets, which had an awareness level comparable to mainstream market channels.

In contrast, a bare majority had heard of purchasing directly from a farm, while there was very limited awareness of the remaining channels, online-only suppliers, CSA/farm box programs and buying clubs.

Chart 1: Have you heard of each of the following types of food suppliers or food outlets in the Calgary region? (Base: Total respondents n=1001)

- **D2M - ANY DIRECT TO MAINSTREAM**
  - Drugstore: 100%
  - Supermarket: 100%
  - Convenience store: 99%
  - Club store: 99%
  - Mass merchandiser: 98%

- **D2I - ANY DIRECT TO INTERMEDIATED**
  - Restaurant or other eating establishment: 99%
  - Health food, organic or natural food store: 93%
  - Ethnic grocery store: 87%
  - Specialty store: 86%
  - Small grocery store: 83%

- **D2C - ANY DIRECT TO CONSUMER**
  - Farmers’ market: 96%
  - Directly from a farm or ranch: 54%
  - Online-only supplier: 24%
  - CSA or farm box program: 20%
  - Buying club: 16%
FAMILIARITY WITH SELECTED CHANNELS

Greater detail on the level of familiarity Calgary Region residents have with each D2I and D2C market channel is shown in Chart 2.

This graph serves to emphasize that of the 10 channels, only two may be considered familiar to the public – restaurants and other food services and farmers’ markets. Although restaurants and farmers’ markets had similar levels of awareness, restaurants were better known and understood, with twice the proportion saying they “know a lot” about them.

The four D2I stores were rated similarly to one another, with 30% to 40% each being fairly familiar with them (“know a lot” or “know something” about them).

Among the other D2C channels, farm retail (i.e., directly from a farm or ranch) was better known, but on a proportionate basis, very few knew “a lot” about these outlets. Online-only suppliers, CSA/farm box programs and buying clubs, were similarly challenged by low familiarity even among those aware of them, with 5% or less indicating higher levels of familiarity.

| Chart 2: How much do you know about each of the following types of food suppliers or food outlets in the Calgary region? (Base: Total respondents n=1001) |
|---|---|---|---|---|---|---|---|---|---|---|
| | Percent of respondents | 0 | 10 | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 |
| **D2I - DIRECT TO INTERMEDIATED** | | | | | | | | | | | | |
| Restaurant or other eating establishment | | 38 | 14 | 2 | 7 | | | | | | | |
| Health food, organic or natural food store | | 11 | 29 | 36 | 13 | 13 | | | | | | |
| Ethnic grocery store | | 11 | 24 | 34 | 16 | 14 | | | | | | |
| Specialty store | | 8 | 28 | 35 | 13 | 17 | | | | | | |
| Small grocery store | | 9 | 22 | 28 | 12 | 29 | | | | | | |
| **D2C - DIRECT TO CONSUMER** | | | | | | | | | | | | |
| Farmers’ market | | | | | | | | | | | | |
| Directly from a farm or ranch | | 20 | 43 | 29 | 3 | 5 | | | | | | |
| Online-only supplier | | 23 | 14 | 26 | 12 | 46 | | | | | | |
| CSA or farm box program | | 13 | 10 | 6 | 80 | | | | | | | |
| Buying club | | 3 | 7 | 5 | 84 | | | | | | | |

- Know a lot
- Know something
- Know a little
- Know nothing, have only heard of them
- Never heard of them
Local food market channels

WHERE LOCAL FOOD IS BOUGHT

Respondents who were aware of each market channel were asked whether they had purchased local food there in the previous 12 months. Local food was defined to them as “food grown or made in Alberta.” They were given the option of responding “yes,” “assume yes,” “just don’t know” and “no.”

The results shown in Chart 3 are based on the total sample, so that they reflect market penetration within the total population. Blank spaces in each row represent the proportion who had never heard of the channel.

This graph indicates that the leading channels for local food in the Calgary Region were supermarkets and farmers’ markets. It was interesting that while the majority of respondents responded affirmatively with certainty (said i.e., “yes”) for both farmers’ markets and
supermarkets, there was a greater degree of uncertainty (i.e., said “assume yes”) for supermarkets. These numbers confirm the difficulty reported by focus group participants in knowing the origin of foods they buy in supermarkets and other stores.

Another result of interest was the high proportion of farmers’ market food shoppers who stated that they did not buy local food through this channel. While the reason for this was not known, a concluding comment from a respondent may be relevant: “I tend not to go to the Calgary Farmer’s Market throughout the year because the participants bring so many non-local products. I only go in the late summer and early fall.”

It was of further interest that, regardless of the smaller numbers that thought they bought local food in each of the other D2M channels, the proportion that said “yes” with certainty was roughly equal to the proportion that were somewhat uncertain and answered “assume yes” (i.e., club store, mass merchandiser, drug store, convenience store). This means that origin was even less well understood in the remaining mainstream channels than in supermarkets. Recent efforts of supermarkets to identify local items as such (whether from Alberta, British Columbia, Western Canada or even as Canadian) appear to have had an effect in reducing uncertainty.

Among the D2I channels, restaurants were the standout performers, but evidently have the same labeling problem as most mainstream channels. The same proportions of people were uncertain as to whether they ate local food there, as were certain. That was also true for small grocery stores and ethnic grocery stores.

On the other hand, customers at specialty stores and health food, organic or natural food stores appeared to be more knowledgeable about food origin, with two-thirds of the affirmative responses being a definite “yes.”

As might have been expected, purchasers at D2C channels were far, far more likely to be sure that they had bought local food there. Farmers’ markets have already been discussed in this regard, but the same was true for each of the other channels – farm retail, online-only suppliers, buying clubs and CSA/farm box programs.

What may not have been anticipated was the very high proportion of those aware of each D2C market channel who said “no” they had not bought local food there. Since the “don’t know” response was small, it was highly likely that they did not purchase food there at all as the question was not confined to channel users, but asked of everyone aware of the channel. They were not alone in this. In the D2I category, ethnic grocery stores and small grocery stores showed a similar pattern of response.
DEMOGRAPHIC PROFILE OF LOCAL FOOD PURCHASERS

Appendix II contains Charts 4 to 14 which profile respondents who purchased local food from each market channel. The results are summarized below and take into account differences across all the measures.

There were no consistent differences across all or even some of the D2M CHANNELS, mainly because they enjoyed such widespread use that their local food buyers were similar to the total market. However, there were differences that help to build a picture of customers at some of the channels individually.

Local food buyers at drugstores and convenience stores were more often Canadian immigrants, young families where the youngest child was under 13 years old (but less likely to be empty nesters) and in the lowest household income category of up to $60,000 in 2014. Convenience stores were used more often than average by males and people with a post-secondary education.

Those reporting use of club stores for local food purchases were more often household members with major or shared responsibility for shopping (as opposed to being fully responsible), married or living together as a couple and born in the Calgary Region.

Mass merchandisers were overrepresented only in being used more often by married/couples.

For supermarkets, there were no important demographic differences when compared to all local food purchasers.

Among the D2I MARKET CHANNELS there were no major differences in the profile of those eating local food at restaurants and other food services.

Health food, organic or natural food store patrons were different from average in being more likely to live in the City of Calgary. They were overrepresented among females and among residents with a university education.

The largest difference among respondents who reported buying local food at ethnic grocery stores was that a far higher proportion lived in a household where someone had been born and raised outside Canada. An overrepresentation existed where the respondent had been born in a foreign country, but this was far less distinctive than when a household member was also raised there. Another set of differences – that the respondent more often had major rather than full responsibility for buying food, was married, male and that the household rarely included only solitary survivors (i.e., older one person households, often widow/ers) – provides further insight into household structure and gender roles. Ethnic grocery store shoppers were more likely than average to live in the City proper and to be university educated.
As with the two previous D2I stores, specialty store patrons lived proportionately more often in the City of Calgary and were more likely to have a university education. Where they differed was in having a higher proportion of shoppers from the highest household income cohort, $140,000 and over.

Small grocery stores were unique in including a very high proportion of local food shoppers who lived in the Region. Young married/couple families were overrepresented, as were respondents with a high school or post-secondary education. Income was somewhat more often in the lower-middle range (over $60,000 to $100,000).

In the D2C market channels there was one consistent profile that helps understand how these consumers (with the exception of farmers’ markets) differ from those visiting D2M and D2I stores. This difference was that they were more likely than the average resident to grow food for their own consumption; and they were three times as likely to grow it outside their own homes, whether in a community garden, on a relative’s farm or on a rural property.

Local food buyers at farmers’ markets did not differ noticeably from the general demographic profile as this was such a widely used market channel.

Farm retail buyers of local food were more likely to live in the Region and to be young married/couple families, but were also overrepresented in the 55-64 year age cohort (and found less often among young singles/couples or those under the age of 35). They were more likely to have a post-secondary education and a lower-middle household income.
A NOTE ON PLACE OF BIRTH

Two charts that were not suitable for comparison by market channel provide clarification on questions asked in the survey about migration and immigration.

The series of three questions was:

- Was anyone in your household born and raised outside Canada?
- Where were you born?
- IF RESPONDENT NOT BORN IN THE CALGARY REGION: Do you consider Calgary/the Calgary Region to be “home”?

Chart 15 shows the answers to the second and third question combined. The distribution is for all survey respondents and the bars add to 100%. Three-in-ten respondents were born in the Calgary Region and 14% were born elsewhere in the province. Almost all considered the Calgary Region to be “home,” a way of saying they were settled there.

Almost two-in-five were inter-provincial migrants. This was the largest group to feel allegiance elsewhere, both in numbers and as a proportion (i.e., 13% of other Canadians did not feel the Calgary Region was home).

Almost one-in-five were born outside Canada and the vast majority (95%) said that Calgary was home. This may be an overstatement as immigrants are notoriously skittish about offending, particularly of offending government authorities. However, even if the rate of “not home” responses was as high as for migrants, the total would have been less than 10% of all survey respondents and nothing important would have changed in the survey findings.

Twenty-seven percent of local food buyers had someone in the household who was born and raised outside Canada, while 19% of respondents were born in another country. The comparable figures for the total sample were 26% and 18% respectively.

Chart 16 shows the responses to the first and second question combined, to describe the 29% of immigrant households in a little more detail.
The results show that over 90% of immigrant households included at least one member who had been both born and raised outside Canada. This means the vast majority of these households would likely want access to foods they had enjoyed in their home countries.

In more than half the households the respondent was born and raised outside Canada, suggesting that most were in a good position to respond about ethno-cultural food needs.

Over one-third of respondents were Canadian born, but helped satisfy the food needs of those in the household who were from other countries.
PATTERNS OF SHOPPING CHANNEL USE

Using respondents who were certain that they had bought local food (defined as responding with a “yes” to at least one channel), the data relating to shopping channel awareness and purchase was factor analysed. Five interpretable components emerged, as shown in Table 1. The factor loadings may be interpreted similarly to correlation coefficients. The higher the loading, the more closely a particular channel resembles the group as a whole. Factor loadings range from +1 to -1, with a minus representing disagreement (i.e., would not purchase there).

Table 1: Local food shopping channel mix*

<table>
<thead>
<tr>
<th>Component</th>
<th>Component 1</th>
<th>Component 2</th>
<th>Component 3</th>
<th>Component 4</th>
<th>Component 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarket</td>
<td>.747</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mass merchandiser</td>
<td>.728</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Club store</td>
<td>.702</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant or other eating establishment</td>
<td>.461</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drug store</td>
<td></td>
<td>.836</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Convenience store</td>
<td></td>
<td>.830</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethnic grocery store</td>
<td></td>
<td></td>
<td>.408</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health food, natural or organic food store or market</td>
<td></td>
<td></td>
<td></td>
<td>.748</td>
<td></td>
</tr>
<tr>
<td>Specialty store</td>
<td></td>
<td></td>
<td></td>
<td>.729</td>
<td></td>
</tr>
<tr>
<td>Online-only supplier</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
</tr>
<tr>
<td>Directly from a farm or ranch</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.795</td>
</tr>
<tr>
<td>Farmers' market</td>
<td></td>
<td></td>
<td>.408</td>
<td>.496</td>
<td>-.415</td>
</tr>
<tr>
<td>Small grocery store</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.493</td>
</tr>
<tr>
<td>Buying club</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.746</td>
</tr>
<tr>
<td>CSA or farm box program</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.555</td>
</tr>
</tbody>
</table>

*Only loadings of .400 and over are shown.
Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.
Rotation converged in 7 iterations.

By allocating each respondent to the segment in which they had the highest component score, local food buyers could be classified into shopping segments representing the mix of outlets that was most likely to be (but not necessarily exclusively) used together. The proportion falling into each segment may be seen in Chart 17.
The largest segment, just over one-third, was termed Mainstream shoppers. The group included supermarkets, mass merchandisers and club stores in particular. Interestingly, restaurants and other eating establishments correlated most closely with the Mainstream component.

The segment was slightly over-represented among females and was slightly less likely to have a university degree than the other segments. In other respects, they resembled the population.

Next in size at one-in-four local food buyers, was the Specialized shopper segment, defined particularly by the use of health food, natural or organic food stores and specialty stores. Farmers' markets weighted into this component, as did online-only suppliers, but this channel was not as strongly correlated as it had a coefficient less than .400.

Specialized shoppers were more likely to be young couples without children, to have a university degree and had the highest average household income of all shopper segments. They were more often Canadian born.

Those dubbed Rural shoppers made up just over one-fifth of the market. Purchasing directly from a farm or ranch was the main market channel defining the component. Farmers' markets were most strongly correlated with this component, though they appeared in others too. Also correlated were small grocery stores.

Defining characteristics of Rural shoppers included a higher than average incidence of living in the Region, a higher likelihood of calling the Calgary Region “home” among respondents not born there, more male respondents and more aged 55-64 years.

Fringe shoppers made up approximately one-tenth of all local food shoppers. They patronized drug stores and convenience stores in particular. Ethnic grocery stores were less highly correlated but were also included in the group.

A higher proportion in this segment was born outside Canada. The households were larger than average, respondents were more likely to be aged 45-54 and teenagers were more likely to be present. This segment had the lowest average household income.

The smallest segment at 7% of households was Alternative shoppers. Buying clubs were the defining market channel, with CSA/farm box programs rounding out the segment.
Of particular interest was that this component was negatively correlated with farmers' markets, meaning that the people who shop at buying clubs or CSA/farm box programs, tend not to shop at farmers' markets.

This segment was most likely of all to live in the City of Calgary, to be a family, especially one where the respondent was aged 18-34 years and pre-school aged children were present, or one with adult children over the age 18. The segment included a higher than average proportion who were single/never married and had a university education.
Growth potential by market channel

Respondents’ future intentions were investigated based on their current awareness of the D2I and D2C market channels and their purchase of local food at these outlets.

Respondents who had not heard of a channel were asked about their interest in the channel, having now read about it (note that the question addressed all food shopping, not just local food). The results are shown in Chart 18. The findings, however, are shown based on the total market to provide an idea of the potential for growth from the non-user base.

It is evident that the potential for market growth from this source was far higher for the D2C channels – with the exception of farmers’ markets – than D2I channels. In the D2C category, only specialty stores were positioned to gain consequential new customers, provided that they learned of the outlets.

The next line of enquiry was directed to people who currently purchased local food at these outlets. They were asked whether they expected their local food purchases in the channel to increase, decrease or stay the same over the next 12 months. Chart 19 shows the results,
based on respondents who were sure they had bought local food there, or assumed they had done so.

In all cases, the modal response was that no change was anticipated.

Among D2I channels, between 72% and 79% expected their purchase of local food to remain the same. In all but restaurants, most respondents anticipating a change thought it would occur in the direction of more local food purchases, especially in health food, organic or natural food stores. For restaurants, future growth in local food consumption was less certain, since those expecting to cut down exceeded the number expecting to buy more.

Among the D2C outlets, the proportion who anticipated continuing on as before ranged from 60% to 69%. In all cases the proportion that thought they would increase their local food purchases exceeded those that expected them to decline. The largest difference, by far, was for farmers’ markets. This channel, in particular, could experience ongoing growth from within its existing customer base.

Immediate future trends for local food among current purchasers point to growth in most of the market channels under investigation.
The final group can be conceptualized as representing missed opportunity, namely, respondents who were aware of and had purchased from a market channel, but had not (or did not know if they had) bought local food there. These respondents were asked whether they intended to change that situation in the next 12 months. The proportion who responded positively is shown in Chart 20.

![Chart 20: In the next 12 months, do you intend to buy local food (food grown or made in Alberta) at any of these suppliers or outlets?](chart)

Once again, farmers’ markets were the standout. Among current users who did not buy local food from a channel in the past 12 months, twice as many thought they would do so at farmers’ markets as the nearest competitor.

Interesting as each individual set of responses was for defining target audience objectives, the real potential is only revealed in the context of the total market. Chart 21 combines all responses on the base of the total sample. The figures that show potential new channel use have been adjusted to include only the proportion that would be likely to purchase local food there, based on the existing purchase pattern.
Farmers’ markets stood out as being the market channel with the strongest opportunity to grow local food sales. Most of that opportunity will be provided by existing customers buying more local food; much of the remainder will be fuelled by existing customers who currently don’t buy local food there but expect to do so.

D2I stores and farm retail were other channels with a relatively strong potential to increase consumption among current local food customers.

Channels with better opportunities to convert existing customers who do not buy local food were specialty stores and farm retail.

D2C channels other than farmers’ markets showed the greatest potential to gain totally new local food customers by making more people aware of their existence.

Movement in the other direction, to reduce local food purchases, was minor in all channels with the exception of restaurants. While the potential for gain exceeded the potential for loss, the likelihood of seeing a reduction appears to be quite strong.
What is local food?

Local foods purchased most often

The request to respondents to freely list the types of local food purchased most often in the preceding 12 months generated hundreds of different items, each based on unaided recall. They are detailed in the tabulations and summarized in this section. Percentages are based on the total number of items mentioned.

The 10 local food items purchased most often (Table 2) included mainly produce and meat. The only value-added item to make the list was bread.

The category totals are shown in Table 3. A similar pattern was seen here, with produce eclipsing all other categories, followed by meats.

Of interest was that the strongest current value-added categories to come to mind were:

- Products made of grains.
- Dairy and dairy products.
- Poultry products.

Table 2: Top 10 local food items purchased

<table>
<thead>
<tr>
<th>#</th>
<th>Item</th>
<th>% of items n=4405</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Vegetables*</td>
<td>9</td>
</tr>
<tr>
<td>2</td>
<td>Beef</td>
<td>7</td>
</tr>
<tr>
<td>3</td>
<td>Fruit</td>
<td>6</td>
</tr>
<tr>
<td>4</td>
<td>Chicken</td>
<td>5</td>
</tr>
<tr>
<td>5</td>
<td>Meat</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>Eggs</td>
<td>5</td>
</tr>
<tr>
<td>7</td>
<td>Bread</td>
<td>4</td>
</tr>
<tr>
<td>8</td>
<td>Potatoes</td>
<td>4</td>
</tr>
<tr>
<td>9</td>
<td>Tomatoes</td>
<td>3</td>
</tr>
<tr>
<td>10</td>
<td>Carrots</td>
<td>3</td>
</tr>
</tbody>
</table>

*Words used by respondents to describe their local food purchases.

Table 3: Local food items purchased – category totals

<table>
<thead>
<tr>
<th>Item</th>
<th>% of items n=4405</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh, frozen, canned or dried fruits or vegetables</td>
<td>47</td>
</tr>
<tr>
<td>Meats</td>
<td>17</td>
</tr>
<tr>
<td>Products made of grains</td>
<td>7</td>
</tr>
<tr>
<td>Poultry</td>
<td>6</td>
</tr>
<tr>
<td>Dairy and dairy products</td>
<td>6</td>
</tr>
<tr>
<td>Poultry products</td>
<td>5</td>
</tr>
<tr>
<td>Products made of fruits or vegetables</td>
<td>2</td>
</tr>
<tr>
<td>Meat products</td>
<td>2</td>
</tr>
<tr>
<td>Honey</td>
<td>2</td>
</tr>
<tr>
<td>Fresh or dried herbs and spices</td>
<td>1</td>
</tr>
<tr>
<td>Condiments and spreads</td>
<td>1</td>
</tr>
<tr>
<td>Grains</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Other products or items</td>
<td>3</td>
</tr>
</tbody>
</table>
Table 4 includes a list of the top individual items mentioned for produce and Table 5 for the remaining categories. The cut-off point for inclusion in these summaries was 1% of all items.

Table 4: Top produce items purchased

| % of items |
|---|---|
| n=4405 |
| Fresh, frozen, canned or dried fruits or vegetables - Total | 47 |
| Vegetables - Total | 36 |
| Vegetables* (unspecified) | 9 |
| Potatoes | 4 |
| Tomatoes | 3 |
| Carrots | 3 |
| Corn | 3 |
| Cucumbers | 2 |
| Lettuce | 2 |
| Onions | 1 |
| Peppers | 1 |
| Beets | 1 |
| Peas | 1 |
| Mushrooms | 1 |
| Cabbage | 1 |
| Fruit - Total | 11 |
| Fruit (unspecified) | 6 |
| Berries** | 3 |
| Apples | 1 |
| Produce (unspecified) | 1 |

*Words used by respondents to describe their local food purchases.

**Including strawberries, blueberries, cherries, raspberries, saskatoon berries and blackberries.

Table 5: Top items purchased in other categories

| % of items |
|---|---|
| n=4405 |
| Meats - Total | 17 |
| Beef* | 7 |
| Meat (unspecified) | 5 |
| Pork | 3 |
| Bison | 1 |
| Lamb | 1 |
| Products made of grains - Total | 7 |
| Bread | 4 |
| Baked goods/ bakery | 1 |
| Pies (content unspecified) | 1 |
| Poultry – Total | 6 |
| Chicken | 5 |
| Dairy and dairy products - Total | 6 |
| Milk | 3 |
| Cheese | 2 |
| Dairy /dairy products (unspecified) | 1 |
| Poultry products – Total | 5 |
| Eggs | 5 |
| Other products or items – Total | 3 |
| Prepared meals | 1 |
| Alcohol and beverages | 1 |
| Alternative proteins** | 1 |
| Products made of fruits or vegetables - Total | 2 |
| Jams | 1 |
| Meat products - Total | 2 |
| Sausages | 1 |
| Honey – Total | 2 |
| Fresh or dried herbs and spices – Total | 1 |
| Herbs (unspecified) | 1 |
| Condiments and spreads - Total | 1 |

*Words used by respondents to describe their local food purchases.

**Including fish, nuts and nut products, rice, lentils and tofu.
UNMET DEMAND

For each of the categories noted previously, respondents who were local food buyers or who thought they might buy local food in the next year were asked, “What particular products or items would you like to see, or see more of, that are grown or made in Alberta?”

Each category contained a list of examples intended to clarify the type of response expected and stimulate further thought regarding their own needs and wishes. The potential for biasing responses toward those examples was acknowledged from the start, but the concern – based on focus group findings – was that people would not know the type of things to say without them. While some respondents appeared to parrot back examples, most chose what was relevant to them, providing a measure of relative importance. Many added to the list or offered further detail on what they wanted. Added products or items cannot be interpreted in quite the same way; if they had been included among the examples, they might have been mentioned more often. Nevertheless, the examples appear to have done their job, as only 3% of respondents indicated that they did not know what they might want.

Overall, 23% of households said they wanted nothing more than what was already available and did not identify items in any of the categories, suggesting that there is substantive unmet demand.

The categories are described in order, based on the proportion of respondents they include with unmet needs. The data, however, is shown based on the number of items identified in the category.

Meats

Meats, described to respondents as, “Meats (including beef, lamb, bison, elk, etc.)” were most likely to be selected by respondents as offering an opportunity for further local food purchases.

In addition to the 26% who wanted nothing more at all or did not know, 17% of respondents provided no input for the meats category or said things like “no,” “none” or “don’t know.” This left 57% who did identify at least one item they would like to see, or see more of.

The items mentioned are summarized in Table 6: Unmet demand for meat.

<table>
<thead>
<tr>
<th>Item</th>
<th>% of Items n=828</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef*</td>
<td>31</td>
</tr>
<tr>
<td>Bison</td>
<td>17</td>
</tr>
<tr>
<td>Lamb</td>
<td>14</td>
</tr>
<tr>
<td>Game meats**</td>
<td>8</td>
</tr>
<tr>
<td>Pork</td>
<td>7</td>
</tr>
<tr>
<td>Goat</td>
<td>2</td>
</tr>
<tr>
<td>Meat (unspecified)</td>
<td>2</td>
</tr>
<tr>
<td>Veal</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>1</td>
</tr>
<tr>
<td>Steaks</td>
<td>4</td>
</tr>
<tr>
<td>Ground meat/ hamburger</td>
<td>3</td>
</tr>
<tr>
<td>Roasts</td>
<td>1</td>
</tr>
<tr>
<td>Organic, grass fed (each)</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.
**Elk 5%, deer 1%, venison 1%.
Table 6. All were percentaged on the total number of positive responses for the category, n=828. Note that items may have been counted more than once in the list if they were classified into more than one group (e.g., lamb roast.) As a result, numbers may add to more than 100%.

As may be seen from the data, Albertans’ love affair with beef continues unabated. Among all the individual items specified, beef was the most frequent pick, by far.

Demand for the second and third items, bison and lamb, was particularly noteworthy for the high frequency with which they were mentioned.

Game meats followed, with elk dominating the category, which also included exotic animals like moose, rabbit, camel and llama.

Pork was mentioned next most often. Pork was not one of the examples given, so this may be the reason for the lower level of mention. On the other hand, there may be an adequate supply of local pork, in which case its relative position would be quite important.

A few respondents mentioned specific cuts of meat, sometimes associated with a particular breed, on other occasions not. The results shown in Table 6 for the cuts are for all types of livestock combined.

No examples of production attributes like organic or grass fed were given since they were examined later through a more appropriate line of questioning. As a result, the percentages for these items, here and in other categories, are likely to represent input from only the most extremely devoted or concerned and may well be higher than shown.

**Dairy and dairy products**

“Dairy and dairy products (including milk, butter, cheese, yogurt, flavoured and fermented products, etc.)” were of interest to 55% of respondents.

The highest demand was voiced for cheese. Although the vast majority did not clarify their thoughts any further, hard cheeses (e.g., cheddar) appeared to outnumber soft cheeses (e.g., cottage cheese) two to one when specified.

Milk was mentioned almost as often as

<table>
<thead>
<tr>
<th>Table 7: Unmet demand for dairy and dairy products</th>
<th>% of items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheese*</td>
<td>30</td>
</tr>
<tr>
<td>Milk</td>
<td>25</td>
</tr>
<tr>
<td>Yogurt</td>
<td>16</td>
</tr>
<tr>
<td>Butter</td>
<td>12</td>
</tr>
<tr>
<td>Dairy/ dairy products (unspecified)</td>
<td>2</td>
</tr>
<tr>
<td>Ice cream</td>
<td>2</td>
</tr>
<tr>
<td>Cream</td>
<td>2</td>
</tr>
<tr>
<td>Kefir</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>11</td>
</tr>
<tr>
<td>Organic, grass-fed (each)</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.
cheese, again without specification. Yogurt was next most popular and, while most wrote nothing more, a small cadre (1%) specifically asked for Greek yogurt. Rounding out the top dairy picks was butter.

The remaining products were not specifically mentioned in the examples and included ice cream, cream and kefir.

**Poultry**

Poultry (“including chicken, turkey, quail, etc.”) was one of the most frequently endorsed categories with 54% identifying at least one item.

By far the highest level of unmet demand for poultry was for chicken. Further detail was rarely given, but 2% each mentioned chicken breasts and free range chicken. 1% each identified interest in chicken wings, cornish game hens, chicken pieces, ground chicken and roasting chicken.

Next was turkey, with few specifying any requirements associated with it.

Other types of fowl were mentioned much less often than these two leaders, including quail, which was included among the examples.

<table>
<thead>
<tr>
<th></th>
<th>% of items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chicken*</td>
<td>56</td>
</tr>
<tr>
<td>Turkey</td>
<td>19</td>
</tr>
<tr>
<td>Duck</td>
<td>3</td>
</tr>
<tr>
<td>Poultry (not specified)</td>
<td>2</td>
</tr>
<tr>
<td>Quail</td>
<td>2</td>
</tr>
<tr>
<td>Pheasant</td>
<td>1</td>
</tr>
<tr>
<td>Goose</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>14</td>
</tr>
<tr>
<td>Free range</td>
<td>3</td>
</tr>
<tr>
<td>Organic</td>
<td>2</td>
</tr>
<tr>
<td>Grain fed</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.*
Fresh, frozen, canned or dried fruits or vegetables

The main local food category that is currently purchased was one of the categories with high latent demand as well, being mentioned by 50% of respondents. It included the largest number of items identified in any one category.

The list in Table 9 shows the types of produce items mentioned, while the list in Table 10 shows the production options identified.

Greatest pent up demand appeared to exist for berries as a group, especially strawberries, blueberries, raspberries and cherries. Demand was also relatively strong for apples and peaches.

For vegetables there was no standout category, but higher numbers of mentions were received for carrots, corn, tomatoes, peas, potatoes, lettuce and beans (mostly green beans).

In terms of production, the most frequently mentioned form was fresh (one respondent even going so far as to request “picked-ripe strawberries”). Less frequently specified were frozen, organic, dried and canned. The majority of descriptions, however, did not indicate a particular form and may be assumed to mean fresh.

Table 9: Unmet demand for produce

<table>
<thead>
<tr>
<th></th>
<th>% of items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fruit</strong></td>
<td></td>
</tr>
<tr>
<td>Berries* **</td>
<td>22</td>
</tr>
<tr>
<td>Fruit (not specified)</td>
<td>8</td>
</tr>
<tr>
<td>Apples</td>
<td>6</td>
</tr>
<tr>
<td>Peaches</td>
<td>2</td>
</tr>
<tr>
<td>Pears, bananas and grapes (each)</td>
<td>1</td>
</tr>
<tr>
<td><strong>Vegetables</strong></td>
<td></td>
</tr>
<tr>
<td>Vegetables (not specified)</td>
<td>8</td>
</tr>
<tr>
<td>Carrots</td>
<td>5</td>
</tr>
<tr>
<td>Corn</td>
<td>5</td>
</tr>
<tr>
<td>Tomatoes</td>
<td>4</td>
</tr>
<tr>
<td>Peas</td>
<td>4</td>
</tr>
<tr>
<td>Potatoes</td>
<td>4</td>
</tr>
<tr>
<td>Lettuce</td>
<td>2</td>
</tr>
<tr>
<td>Cucumbers</td>
<td>2</td>
</tr>
<tr>
<td>Beans</td>
<td>2</td>
</tr>
<tr>
<td>Mushrooms, beets, broccoli, spinach, celery, salad greens, onions, cauliflower, squash, zucchini, peppers and asparagus (each)</td>
<td>1</td>
</tr>
<tr>
<td>Yes/all/more</td>
<td>7</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.

**Strawberries 6%, blueberries 4%, raspberries 3%, cherries 2%, saskatoon berries and blackberries 1% each. Others were cranberries and huckleberries, as well as berries in general.

Table 10: Unmet demand by production attributes

<table>
<thead>
<tr>
<th></th>
<th>% of items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fresh</strong></td>
<td>12</td>
</tr>
<tr>
<td><strong>Frozen</strong></td>
<td>4</td>
</tr>
<tr>
<td><strong>Dried</strong></td>
<td>2</td>
</tr>
<tr>
<td><strong>Canned</strong></td>
<td>2</td>
</tr>
<tr>
<td>Organic</td>
<td>2</td>
</tr>
<tr>
<td>Pesticide free</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Non-GMO</td>
<td>&lt;1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.
Poultry products

“Poultry products (including eggs, poultry sausage, cured poultry, pot pies, etc.)” generated requests from 49% of local food buyers and potential buyers.

Dominating needs for the category were eggs, with references to free range eggs being most notable.

Poultry sausage was next highest in demand, with chicken slightly edging out turkey, though most did not specify anything further.

Closely following in interest were pot pies or poultry pies, with chicken once again being mentioned more often than turkey.

Table 11: Unmet demand for value-added poultry products

<table>
<thead>
<tr>
<th>% of items</th>
<th>n=548</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eggs*</td>
<td>60</td>
</tr>
<tr>
<td>Poultry sausage**</td>
<td>11</td>
</tr>
<tr>
<td>Pot pies/ pies</td>
<td>9</td>
</tr>
<tr>
<td>Chicken products</td>
<td>5</td>
</tr>
<tr>
<td>Poultry products (type not specified)</td>
<td>4</td>
</tr>
<tr>
<td>Turkey products</td>
<td>2</td>
</tr>
<tr>
<td>Poultry bacon, poultry jerky (each)</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>15</td>
</tr>
<tr>
<td>Free range (mostly eggs)</td>
<td>3</td>
</tr>
<tr>
<td>Organic</td>
<td>2</td>
</tr>
<tr>
<td>Nitrite/ sulphate/ MSG/ additive free, fresh farm eggs (each)</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.
**Poultry sausage (unspecified) 3%, chicken 2%, turkey 1%.

Products made of fruits or vegetables

The category was described to respondents as, “Products made of fruits or vegetables (including juices, jams, jellies, syrups, pickles, relish, chutneys, salsas, antipastos, etc.)”

In all, 46% made one or more suggestions in the produce value-added category.

Jams showed by far the greatest level of unmet demand. On the occasions that more information was specified about them, it was generally for fruit jam, such as saskatoon berry, strawberry, blueberry or raspberry, continuing the earlier theme of high interest in “berries.”

Salsas (usually with nothing more specified) were next highest in interest, followed by pickles (also usually with nothing further specified).

Table 12: Unmet demand for value-added produce items

<table>
<thead>
<tr>
<th>% of items</th>
<th>n=694</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jam*</td>
<td>31</td>
</tr>
<tr>
<td>Salsa</td>
<td>12</td>
</tr>
<tr>
<td>Pickles/pickled</td>
<td>10</td>
</tr>
<tr>
<td>Jelly</td>
<td>6</td>
</tr>
<tr>
<td>Juice</td>
<td>6</td>
</tr>
<tr>
<td>Syrup</td>
<td>5</td>
</tr>
<tr>
<td>Relish</td>
<td>4</td>
</tr>
<tr>
<td>Chutney</td>
<td>4</td>
</tr>
<tr>
<td>Antipasto</td>
<td>4</td>
</tr>
<tr>
<td>Dips, marmalade, preserves (each)</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>11</td>
</tr>
<tr>
<td>Corn products, saskatoon berry products (each)</td>
<td>1</td>
</tr>
<tr>
<td>Organic, sugar-free (each)</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.
Other items making up more than 5% of mentions were jellies, juices (usually fruit juices) and syrups (with maple being mentioned a few times).

**Honey**

Positive responses to the category of “honey” as a local food were received from 45%. More than half simply wrote in the word without further elaboration.

Among those who provided further description, a desire for a specific flavour or a variety of flavours was expressed. This was either based on the blossoms visited by the bees (e.g., clover 1%, wildflower 1%) or, less frequently, on added flavourings (such as cinnamon or mint).

On the production side, unpasteurized or raw honey appears to have quite an appeal, being specified 5% of the time. Furthermore, use of the terms “wild,” “natural,” “real” and “farm fresh” may point to a concern about adulteration of commercial products.

Liquid honey was specified twice as often as cream honey.

**Products made of grains**

Examples provided of products made from grains included, “pancake mix, muffin mix, breakfast cereal, granola, etc.”

One or more suggestions relating to this category were made by 43% of respondents.

Topping the list were cereals, often termed breakfast cereals. The figure shown does not include oatmeal or granola as they are not always used as a breakfast cereal.

---

**Table 13: Unmet demand for honey**

<table>
<thead>
<tr>
<th>% of Items</th>
<th>n=446</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honey*</td>
<td>53</td>
</tr>
<tr>
<td>Different flavours/ blossoms</td>
<td>8</td>
</tr>
<tr>
<td>Mead</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ any/ more</td>
<td>19</td>
</tr>
<tr>
<td>In a bottle</td>
<td>1</td>
</tr>
<tr>
<td>In a large container/ tub</td>
<td>1</td>
</tr>
<tr>
<td>Unpasteurized/ raw</td>
<td>5</td>
</tr>
<tr>
<td>Liquid</td>
<td>4</td>
</tr>
<tr>
<td>Cream/ thick</td>
<td>2</td>
</tr>
<tr>
<td>Natural/ real</td>
<td>2</td>
</tr>
<tr>
<td>Organic</td>
<td>2</td>
</tr>
<tr>
<td>Wild, farm fresh (each)</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.

**Table 14: Unmet demand for value-added grain products**

<table>
<thead>
<tr>
<th>% of Items</th>
<th>n=550</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cereals/ breakfast cereal* **</td>
<td>22</td>
</tr>
<tr>
<td>Granola</td>
<td>18</td>
</tr>
<tr>
<td>Bread</td>
<td>15</td>
</tr>
<tr>
<td>Baking mixes***</td>
<td>14</td>
</tr>
<tr>
<td>Pies, muffins, pastries, bars ****</td>
<td>8</td>
</tr>
<tr>
<td>Oatmeal/ oats products</td>
<td>3</td>
</tr>
<tr>
<td>Buns, bagels, rolls</td>
<td>2</td>
</tr>
<tr>
<td>Baked good (not specified)</td>
<td>2</td>
</tr>
<tr>
<td>Pancakes</td>
<td>1</td>
</tr>
<tr>
<td>Pasta</td>
<td>1</td>
</tr>
<tr>
<td>Pizza/ shells</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>12</td>
</tr>
<tr>
<td>Gluten free/ non-wheat flour</td>
<td>4</td>
</tr>
<tr>
<td>Whole grain/ whole wheat</td>
<td>1</td>
</tr>
<tr>
<td>Organic</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.

**Hot cereals 3%.

*** Pancake mixes 8%, muffin mixes 4%, waffle mixes 1%, bread mixes 1%

**** Pies 3%, muffins 2%, granola bars 2%.
Specifically identified hot cereals made up only a small proportion of the category.

Granola was in second greatest demand, with some being requested in the form of granola bars (also counted under pastries).

Bread was mentioned next most often, counted separately from buns, bagels and rolls.

Baking mixes were next. Of these, pancake and muffin mixes were the most popular suggestions.

The final group of note was pastry, which included mainly pies (filling unspecified), muffins and bars.

**Meat products**

“Meat products (including sausages, cured/smoked meat, meat pies, etc.)” form the next category. 42% of respondents identified at least one local food item here that they would like or like more of.

Dominating the category were sausages, making up almost half the items mentioned. In general, they were not described further, but 1% each referred to beef sausages, pepperoni, chorizo, farmers’ sausages, garlic sausages and hot dogs.

Meat pies were next and included meat pot pies.

Cured meats were mostly not further described, but included sandwich or lunch meats and cured sausages.

Next most often mentioned were smoked meats (including smoked sausages and smokies), followed by bacon and jerky (often beef jerky).

| Table 15: Unmet demand for value-added meat products |
|-----------------------------------------------|----------|
| % of items n=502                              |          |
| Sausage*                                      | 47       |
| Pies                                          | 11       |
| Cured meats                                   | 8        |
| Smoked meats                                  | 6        |
| Bacon                                         | 6        |
| Jerky                                         | 4        |
| Ham, hamburger patties, meat products          | 1        |
| (unspecified) (each)                          |          |
| Yes/ all/ more                                | 16       |
| Nitrate/ sulphate/ MSG free/ low sodium       | 2        |
| Gluten free, organic (each)                   | 1        |

*Terms used by respondents to describe the local food wanted.
Grains

This category was described to respondents as: “Grains (including rolled oats, flax, flour, etc.).”

At least one item was mentioned in the grains category by 38%.

Leading demand were flour and oats. The type of flour was rarely specified, but when it was, wheat flour or whole grain flour was mentioned more often. Oats was also rarely described further, with rolled oats and steel cut oats being the major descriptors.

Next in demand were flax (including flax seeds) and ancient grains. Barley was the most frequently mentioned ancient grain, followed by quinoa and chia seeds.

Other grains making up 5% or more mentions were wheat (in total) and seeds. In addition to flax and chia seeds, hemp seeds/hemp hearts were notable mentions in this group.

Fresh or dried herbs and spices

Items of interest in the herbs and spices category were noted by 37% of respondents.

Herbs were mentioned far more often than spices, whether in general or identified by name. Fresh herbs were also far more frequently mentioned than dried, so it was possible that people saw this as part of the produce category.

Among the identified herbs, basil stood well above any others in popularity.

<table>
<thead>
<tr>
<th>Table 16: Unmet demand for grains</th>
<th>% of items</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n=470</td>
</tr>
<tr>
<td>Flour*</td>
<td>27</td>
</tr>
<tr>
<td>Oats**</td>
<td>24</td>
</tr>
<tr>
<td>Flax</td>
<td>10</td>
</tr>
<tr>
<td>Ancient grains***</td>
<td>9</td>
</tr>
<tr>
<td>Wheat</td>
<td>6</td>
</tr>
<tr>
<td>Seeds</td>
<td>5</td>
</tr>
<tr>
<td>Whole grains, multigrain, bran (each)</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>17</td>
</tr>
<tr>
<td>Organic</td>
<td>3</td>
</tr>
<tr>
<td>Gluten free</td>
<td>2</td>
</tr>
<tr>
<td>Non-GMO</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.

** Rolled oats 8%, steel cut oats 2%.

***Barley 3%, quinoa 2%, chia seeds 2%, buckwheat 1%.

<table>
<thead>
<tr>
<th>Table 17: Unmet demand for fresh herbs and spices</th>
<th>% of items</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n=482</td>
</tr>
<tr>
<td>Herbs (unspecified)/all herbs*</td>
<td>19</td>
</tr>
<tr>
<td>Basil</td>
<td>12</td>
</tr>
<tr>
<td>Spices (unspecified)/all spices</td>
<td>9</td>
</tr>
<tr>
<td>Dill</td>
<td>5</td>
</tr>
<tr>
<td>Cilantro/coriander</td>
<td>5</td>
</tr>
<tr>
<td>Parsley</td>
<td>5</td>
</tr>
<tr>
<td>Garlic</td>
<td>4</td>
</tr>
<tr>
<td>Oregano</td>
<td>4</td>
</tr>
<tr>
<td>Thyme</td>
<td>4</td>
</tr>
<tr>
<td>Rosemary</td>
<td>4</td>
</tr>
<tr>
<td>Mint</td>
<td>3</td>
</tr>
<tr>
<td>Chives</td>
<td>2</td>
</tr>
<tr>
<td>Peppers (various), cinnamon, lavender, sage, tarragon (each)</td>
<td>1</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>16</td>
</tr>
<tr>
<td>Fresh herbs (and spices)</td>
<td>10</td>
</tr>
<tr>
<td>Dried herbs and spices</td>
<td>4</td>
</tr>
<tr>
<td>Organic</td>
<td>2</td>
</tr>
<tr>
<td>Gluten free</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.
Also mentioned fairly frequently were: dill, cilantro/coriander, parsley, garlic, oregano, thyme and rosemary.

Condiments and spreads

The category of condiments and spreads included “ketchup, mustard, salad dressings, margarine, flavoured oils and vinegars, marinades, etc.” as examples.

At least one condiment that they would like to see produced locally was identified by 33% of respondents.

Salad dressings proved to be in greatest demand, exceeding oils (both flavoured and cooking oils), ketchup and mustards.

Marinades and vinegars were next in interest, each making up more than 5% of the condiments mentioned.

Other products or items

As 9% of respondents mentioned something that was not included in the foregoing categories, the list suggests potential new avenues of exploration. Many of the items appeared to be gluten free options, though that was not specifically catalogued here.

Leading the demand were alternative proteins. The rice/lentils group was mostly made up of requests for local rice products. Nuts included almond products, peanuts and pine nuts. Soy products were mentioned far more than tofu and were often dairy substitutes.

In the alcohol and beverages group, wine

<table>
<thead>
<tr>
<th>Table 18: Unmet demand for value-added condiments</th>
<th>% of items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salad dressing*</td>
<td>20</td>
</tr>
<tr>
<td>Oils**</td>
<td>14</td>
</tr>
<tr>
<td>Ketchup</td>
<td>13</td>
</tr>
<tr>
<td>Mustards</td>
<td>12</td>
</tr>
<tr>
<td>Marinades</td>
<td>6</td>
</tr>
<tr>
<td>Vinegars</td>
<td>6</td>
</tr>
<tr>
<td>Margarine and spreads</td>
<td>5</td>
</tr>
<tr>
<td>Sauces</td>
<td>5</td>
</tr>
<tr>
<td>Mayonnaise</td>
<td>3</td>
</tr>
<tr>
<td>Yes/ all/ more</td>
<td>15</td>
</tr>
<tr>
<td>Gluten free</td>
<td>1</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.
**Flavoured oils 4%, olive oil 2%, canola oil 1%.

<table>
<thead>
<tr>
<th>Table 19: Unmet demand for other products</th>
<th>% of items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternative proteins</td>
<td>37</td>
</tr>
<tr>
<td>Rice/ lentils*</td>
<td>12</td>
</tr>
<tr>
<td>Nuts</td>
<td>9</td>
</tr>
<tr>
<td>Soy/ tofu</td>
<td>8</td>
</tr>
<tr>
<td>Fish</td>
<td>7</td>
</tr>
<tr>
<td>Alcohol and beverages</td>
<td>19</td>
</tr>
<tr>
<td>Prepared foods</td>
<td>11</td>
</tr>
<tr>
<td>All food</td>
<td>2</td>
</tr>
<tr>
<td>Lactose free dairy or other products**</td>
<td>8</td>
</tr>
<tr>
<td>Vegan/ vegetarian products**</td>
<td>5</td>
</tr>
<tr>
<td>Non-GMO products</td>
<td>4</td>
</tr>
<tr>
<td>Organic/ natural products</td>
<td>3</td>
</tr>
</tbody>
</table>

*Terms used by respondents to describe the local food wanted.
**Total mentions.
Knowing where food was grown or raised could be interpreted as meaning anything from the general “in Alberta,” to very precise knowledge of the farm, farmer and the farm’s production practices.

The high proportion requesting a “complete list of ingredients” speaks to the ownership that Calgary Region residents were taking for their food selections. It also reflected their desire to choose whether or not to buy food with particular ingredients, additives or preservatives (all well covered in the focus groups). This attribute scored higher than “can trust the food,” which implied food safety and integrity in production – because many felt they can’t – or in government regulation and testing.
was in greatest demand, making up almost half the requests (8%). Beer was next at 3%.

Prepared foods ranged from perogies and cabbage rolls to scotch eggs and black pudding. Grilled or roasted poultry and corn were other items mentioned.

On the production side, all requests for lactose free and vegan/vegetarian options were captured in this category.

Specification here of non-GMO products and organic or natural products was intended to capture respondents’ global statements applying these values to all local food items; as seen earlier, individual notations were captured separately in the relevant categories.

CURRENT AND UNMET DEMAND BY CHANNEL SEGMENT

There were some differences between the current purchases and the needs of Calgary Region residents within each of the five shopping segments.

Mainstream shoppers, who favoured supermarkets, mass merchandisers and club stores, as well as restaurants and other eating establishments, were more likely than the other segments to say they didn’t know what other local food products they would like to see. They were less likely to identify meat and eggs as locally produced items that they currently purchase. They also did not stand out in choosing any items they would like to see or see more of.

Specialized shoppers, who were defined particularly by their use of health food, natural or organic food stores and specialty stores, as well as farmers’ markets, purchased local chicken, potatoes and cucumbers more often than other segments. They were more likely than average to mention local items they would like to see more of, especially: eggs, jams, breads and unpasteurized/raw honey.

Rural shoppers purchased more often directly from a farm or ranch, also from farmers’ markets and small grocery stores. The locally sourced products they currently purchase were more likely than average to be chicken and meat. They were very likely to identify items they would still like to see produced locally, with eggs, chicken, cheese, sausages made of meat and different flavours of honey standing out in comparison to other shopper segments.

Fringe shoppers patronized drug stores and convenience stores in particular, but also ethnic grocery stores. This segment was less likely than average to be buying local beef, chicken or corn and more likely to purchase local eggs, meat (type unspecified) and milk. Unmet needs included yogurt and apples. They were less interested than average in local jams and turkey.

The small Alternative shopper segment was defined by shopping through buying clubs, along with CSA/farm box programs, but not farmers’ markets. This group was distinctive for
the number and types of products they mentioned at a relatively higher rate. Current local food purchases more often included fruit in general, potatoes, tomatoes, carrots, apples, onions, cheese and baked goods. In terms of unmet needs, the products included: eggs, turkey, lamb, yogurt, ketchup, pork, salsa, basil, mushrooms, potatoes, relish, oregano, fruit in general, quail, granola bars, rice flour, cornish game hens and kefir. Local items mentioned less often as being needed were chicken and milk.
Perceptions of and needs from local food

PRODUCTION ATTRIBUTES

Preferred production attributes

In the open-ended responses to questions about the types of foods that local food buyers would like to see or see more of, there were usually a small number who specifically asked for foods produced a certain way – whether organic, or free range or something else. This section addresses preferences for production attributes.

The original list included over 40 descriptors, mentioned in the Calgary focus groups or identified in the food segmentation literature. The list was pared down to 18 thematic attributes, many of which encompassed several of the original descriptors.

Respondents were asked to choose up to five attributes they would like to see in their local food. The results are displayed in Chart 22.

The graph shows that there was no one attribute – or even two or three – that stood out as desirable in this market. The top pick, by almost half the market, was “no preservatives, additives, fillers,” a concept that encompasses such characteristics as food purity, lack of adulteration, no artificial ingredients and being sugar, salt or soy free. Being sugar (NSA or “no sugar added”), nitrate or soy free were each mentioned occasionally in describing unmet local food needs.

In the same vein, the second most frequently chosen attribute was also about what should not be present, in this case, “no chemicals.” This generic term is variously interpreted to mean hormones, antibiotics, colouring, flavouring, pesticides and synthetic fertilizers. The first two items were specified a few times in the local food gap identification exercise and probably drive the category in the Calgary Region.

The number three choice was “high quality ingredients,” a rather generic label that may be used when respondents have a wholistic rather than detailed view of what they mean by quality.

Rounding out the top five, were “humanely raised animals” and “know where grown or raised.” Humane animal husbandry was on the list of needs in relation to meats and poultry and their value-added products. The concept includes such things as free run, free range, grass fed or pastured animals (all the foregoing having been mentioned spontaneously), not crowded or restricted in a cage, healthy animals and no animal testing.
In the mid-range set of choices, a theme of “less” was evident, encompassing “less/minimally processed” (also implying whole ingredients, a relatively popular request for grain products), less packaging and being “simple.” The theme of simplicity encompasses such attributes as having few ingredients, plain ingredients, recognizable ingredients and ingredients you can pronounce (the latter is perhaps a catch phrase, but it made the point in the focus groups).

The last set of items with a theme suggested that relatively few attached importance to many farming practices that add significantly to production costs. Most notable was the low demand for organic practices, whether certified or uncertified, though “natural farming practices” resonated a little more.

“Authenticity,” with its overtones of being “real” or tasting like it’s supposed to taste, was also chosen infrequently. Other less frequently selected production attributes were “farm practices protect the air, water, soil,” “transparency of farming/production practices” and products being “vine/tree/field ripened.”

Attributes specified under “other” by respondents because they were not included on the list, had three main themes. The predominant one was that prices should be lower or cheaper, or at least competitive (price is addressed in greater detail in the barriers section). The other two themes were again expressions of what it was important not to have – non-GMO, or being free of unwanted elements like gluten or peanuts, or having no added salt or sweeteners (natural or man-made).

**Production attributes segments**

While a list such as that shown in Chart 22 is typical in local food research, people are not driven to make purchase decisions based on 18 or more disparate items. They usually have an internally consistent set of values that influence their behaviour.

Factor analysis identified six cohesive components, based on the pattern of production attribute choices made together. These are shown in Table 20.

Each local food buyer and potential buyer was then allocated into the segment in which they had the highest score. The resulting local food production segments represented the mix of preferences that were most likely to provide the frame of reference for the people in that segment. The proportion in each segment may be seen in Chart 23.

- **Less is More**, the largest segment at 23%, valued low consumption behaviour. They identified less or minimally processed products and less packaging as their key drivers. Natural farming practices and the idea of authenticity, along with being certified organic, knowing where the food was grown and transparency of production practices were of little use to them.
This segment was found relatively more often among Mainstream shoppers and less among those using Fringe stores.

Fewer than average lived in immigrant households and a higher than average proportion were females with a high school diploma or equivalent.

Table 20: Production attributes mix*

<table>
<thead>
<tr>
<th>Component</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep it Simple</td>
<td>.664</td>
<td>.502</td>
<td>-.384</td>
<td></td>
<td></td>
<td>-.351</td>
</tr>
<tr>
<td>Protect the World</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unregulated Organic/Natural</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Certified Organic + Ingredient List</td>
<td>.578</td>
<td></td>
<td></td>
<td>-.351</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less is More</td>
<td>-.578</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Known Provenance</td>
<td>-.364</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No preservatives/additives/fillers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No chemicals</td>
<td>.562</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Simple</td>
<td>.502</td>
<td>-.384</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Humanely raised animals</td>
<td>.643</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Farm practices protect the air, water, soil</td>
<td>.564</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transparency of farming/production practices</td>
<td>.396</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Authentic</td>
<td>-.364</td>
<td></td>
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<tr>
<td>Government regulated/tested</td>
<td>.532</td>
<td></td>
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</tr>
<tr>
<td>Follow organic practices (not certified)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete list of ingredients</td>
<td>-.464</td>
<td>.351</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use natural farming practices</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>-.359</td>
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<tr>
<td>High quality ingredients</td>
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<td>-.659</td>
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<td></td>
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<tr>
<td>Can trust the food</td>
<td>.546</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Certified Organic</td>
<td>.403</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Less/minimally processed</td>
<td></td>
<td></td>
<td></td>
<td>.619</td>
<td></td>
<td></td>
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<tr>
<td>Less packaging</td>
<td>.304</td>
<td>.594</td>
<td></td>
<td></td>
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<tr>
<td>Don't know</td>
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<td>-.728</td>
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<tr>
<td>None of the above</td>
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<td>-.422</td>
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<tr>
<td>Know where grown/raised</td>
<td>.387</td>
<td>.301</td>
<td>.409</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Other attributes</td>
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<td></td>
<td>-.306</td>
<td></td>
</tr>
<tr>
<td>Vine/ tree/ field ripened</td>
<td>*</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Only loadings of .300 and over are shown.
Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.
Rotation converged in 7 iterations.

- **Keep it Simple** could be the mantra for 19%. They supported simplicity in their food, a simple frame of origin reference to make decisions (e.g., that the food was produced in Alberta) and less packaging. They also felt they could trust local food and that it was authentic.
They were not concerned with details like the presence of preservatives, additives and fillers or of chemicals, nor with other details like being vine, tree or field ripened or that animals were humanely raised. This segment was least likely to want to read lists of ingredients.

Keep it Simple production values were found proportionately among all shopper segments.

The segment included a higher than average proportion of migrants from other Canadian provinces who were less likely to consider Calgary to be “home.” An above average proportion was male and had a university degree.

- **Protect the World** was almost as large a segment at 18%. They valued knowing that animals were humanely raised, that the environment is protected (farm practices protect the air, water, soil) and transparency of farming and production practices. They often preferred natural farming practices. Simplicity and authenticity were of little interest to them and they were not interested in knowing where the food was grown or raised.

These values were found relatively more often among Mainstream and less among Rural shoppers. As a result they were more concentrated than other segments in the City of Calgary. They were especially overrepresented among younger people living in groups and females. They had the lowest average household incomes among the production segments as few fell into the highest income group.

In spite of the very low proportion of people who chose organic or natural practices as individually sought after attributes, when put together with other supporting attributes, two sizable segments with different needs emerged that would, in fact, value such production. Together, they made up almost one-third of the market.

- **Certified Organic with a Complete List of Ingredients** to further improve the choices being made when shopping for food was a segment that included 16% of respondents. This segment was influenced by knowing where the food originated and here it was likely that the particular farm, farmer and production details were all of importance. Transparency of production practices was valued by the segment, providing the opportunity to check for themselves, as “no chemicals” was a higher than average choice.
What was rejected was equally interesting. Such nebulous claims as “high quality” were greeted with scepticism, along with having an automatic trust in the food. This segment would clearly be responsible for vetting products themselves.

Other less frequently chosen attributes were farm practices that protect the environment, authenticity, being simple or vine, tree or field ripened. These values suggest that the segment was concerned primarily about what was in the food.

Segment members were much less likely to be found among Mainstream shoppers and overrepresented among patrons of Specialized stores where they can presumably enjoy one-on-one interactions.

An above average proportion lived in a household with someone who was born and raised outside the country and/or were immigrants themselves. They tended to be female.

- **Unregulated Organic/Natural** proponents comprised an almost equally large group at 15%. Their interest was in knowing that organic or natural farming practices were being used, even when not certified. Authenticity and not using chemicals were frequent complementary attribute choices.

Many preferred an informal approach. They expressed reservations about the existing system, which they showed by not valuing government regulation and testing. As one respondent stated, “I do not believe that local needs to be “organic”; in Canada the term “organic” is meaningless as the government does not enforce or adequately monitor those that make the organic claims.” They were less interested in seeing lists of ingredients. They also did not want to personally pursue information by knowing where the food was grown or raised and did not care about transparency of production practices.

The segment was found somewhat more among shoppers at Fringe stores and less at Specialized stores.

They included the highest proportion of Regional residents. Those who were born outside Canada were especially likely to feel that Calgary was “home.” They were more likely to have pre-school families where the youngest child was under 6 years old and were unlikely to be solitary survivors or over 65 years of age. More were males, with a higher representation of trade qualifications than other segments.

- **Known Provenance** was the driving force for the smallest segment at 9%. These respondents were least likely to say that they could not answer the question as there were many options that were relevant to them. However, they did especially value knowing where the food was grown or raised. As the segment was found somewhat more often among Rural shoppers, their understanding of food origin was likely more intimate and based on personal relationships, rather than location or production attributes.

That would help explain above average trust in the food and an expectation of high quality ingredients with very low demand for organic certification, despite being the most likely of all to demand “no preservatives, additives or fillers” and “no chemicals.”
This segment was less likely to be living in a household with someone who was born and raised outside Canada or to be an immigrant themselves. It included a higher than average proportion of grown families (i.e., with adult children) and fewer young couples. As a result, respondents were less likely to be under 35 years of age. Respondents were more often males.

**PURCHASING MOTIVATIONS**

**Leading non-production motivators**

Another set of phrases was presented to respondents to describe their top three reasons for purchasing local food. Production attributes help with decision making and in some circumstances may also be motivating, but on the whole, the two sets appear to have measured somewhat different things.

The results are shown in Chart 24, by ranking and in total.

Three of the options proved to be more popular than the others, each being selected by almost half the respondents. Leading the choices was the reason that food is “fresher,” picked most often in the number one spot and overall. This was followed by the rationale that buying local food supports Alberta’s small family farms and the provincial economy as a whole. It was interesting that the first reason was of personal benefit, while the next two were far more altruistic.

The same mix was found in the next three statements, all chosen by between approximately 20% and 30% as a major reason for buying local food. First in this group was that the food tastes better; second was the benefit it offers small independent businesses; and then the third item reverted to a personal benefit, namely that local food was “healthier for you.”

The remaining three items that were chosen by at least 10% included: “not coming from far;” “better nutritional value” and “not as expensive as organic.”

Among the less important motivators – or at least, less frequently chosen ones – were: “know the story behind the food” and “have a good relationship with the producers;” “have confidence in the local food system;” and “enjoy the shopping atmosphere/experience.”

Items added by respondents because they were not included on the list dealt almost exclusively with perceptions of reduced environmental impacts, both in general, being “better for the planet” and more specifically in reducing transportation impacts and minimizing the carbon footprint. The percentage shown should be ignored. Many more might have selected environmental benefits had the option been shown.
Chart 24: Among the following, what are your top 3 reasons for purchasing local food?
(Base: Total respondents purchasing local food or intending to do so n=965)

<table>
<thead>
<tr>
<th>Reason</th>
<th>First choice</th>
<th>Second choice</th>
<th>Third choice</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresher</td>
<td>20</td>
<td>15</td>
<td>14</td>
<td>48</td>
</tr>
<tr>
<td>Supports Alberta’s small/family farms</td>
<td>18</td>
<td>15</td>
<td>14</td>
<td>46</td>
</tr>
<tr>
<td>Supports Alberta’s economy</td>
<td>14</td>
<td>16</td>
<td>16</td>
<td>46</td>
</tr>
<tr>
<td>Tastes better</td>
<td>11</td>
<td>12</td>
<td>8</td>
<td>31</td>
</tr>
<tr>
<td>Supports small independent businesses</td>
<td>8</td>
<td>10</td>
<td>11</td>
<td>28</td>
</tr>
<tr>
<td>Healthier for you</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>21</td>
</tr>
<tr>
<td>Not coming from far</td>
<td>4</td>
<td>5</td>
<td>7</td>
<td>15</td>
</tr>
<tr>
<td>Better nutritional value</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>14</td>
</tr>
<tr>
<td>Not as expensive as organic</td>
<td>4</td>
<td>4</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Know the story behind the food</td>
<td>33</td>
<td>8</td>
<td>8</td>
<td>48</td>
</tr>
<tr>
<td>Have confidence in the local food system</td>
<td>33</td>
<td>8</td>
<td>8</td>
<td>48</td>
</tr>
<tr>
<td>Enjoy the shopping atmosphere/experience</td>
<td>212</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have a good relationship with the producers</td>
<td>11</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Different, specialty or ethnic food</td>
<td>11</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Easy to order</td>
<td>11</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better appearance</td>
<td>11</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other attributes</td>
<td>11</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don’t know</td>
<td>2</td>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Buyer motivation segments

As with the production attributes, the data were factor analysed and six potentially useful ways of viewing consumer perceptions of the benefits of local food emerged. These components are shown in Table 21.

Table 21: Motivating themes*

<table>
<thead>
<tr>
<th>Component</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Health</td>
<td>Fresher Better</td>
<td>Producer Relations</td>
<td>Economic Benefit</td>
<td>Price</td>
<td>Sensory Stimulus</td>
</tr>
<tr>
<td>Better nutritional value</td>
<td>.747</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Healthier for you</td>
<td>.744</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresher</td>
<td>.718</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supports Alberta's small/ family farms</td>
<td>-.595</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tastes better</td>
<td>.477</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>-.458</td>
</tr>
<tr>
<td>Better appearance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have a good relationship with the producers</td>
<td>.614</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Easy to order</td>
<td>.596</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other attributes**</td>
<td>.463</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have confidence in the local food system</td>
<td></td>
<td></td>
<td></td>
<td>.638</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supports Alberta's economy</td>
<td></td>
<td></td>
<td></td>
<td>-.327</td>
<td>.547</td>
<td></td>
</tr>
<tr>
<td>Supports small independent businesses</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>-.660</td>
</tr>
<tr>
<td>Not coming from far</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.578</td>
<td></td>
</tr>
<tr>
<td>Not as expensive as organic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.539</td>
<td></td>
</tr>
<tr>
<td>Don’t Know</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Different, specialty or ethnic food</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.665</td>
<td></td>
</tr>
<tr>
<td>Enjoy the shopping atmosphere/ experience</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>-.334</td>
<td>.507</td>
</tr>
<tr>
<td>Know the story behind the food</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.351</td>
<td>-.352</td>
</tr>
</tbody>
</table>

*Only loadings of .400 and over are shown.
Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.
Rotation converged in 16 iterations.
**Mainly environmental benefits.

The highest factor loading score was then used to classify respondents into their predominant segments, with the distribution shown in Chart 25.

- **Economic Benefits** were the main motivators for one-in-four (25%), making up the largest segment of local food buyers. The particular form of benefit chosen was to support the provincial economy, but this segment was also the most likely to say it supports Alberta’s small family farms. The other notable part of the component was that almost everyone who bought local food because they have confidence in the local food system was captured in the segment. It was particularly interesting that personal benefits were missing from the array, most notably in the rejection of the notion that local food tastes
better; this group also rejected the idea that shopping for local food was an enjoyable experience.

The segment was slightly overrepresented among Mainstream shoppers and valued production attributes in the Protect the World segment.

- **Price** defined the major criteria for the second largest segment (21%). The interpretation of “not coming from far” by the segment was likely a rationale for expecting lower local food prices. Local food was also valued for not being as expensive as organic, perhaps for the expected same quality level. The segment tended not to be concerned about economic benefit to others, particularly small independent businesses, because it was their own economic circumstance that was the driver.

Chart 26 confirms the importance of price to this segment. As many as 30% of respondents who were classified as Price Driven when making food choices were in the segment. The rate declined for those who were Price Conscious and dropped even further where price was not quite as important to choice. No such pattern was found for the other motivation segments.

Price segment members tended to be younger (under 45 years old) and had the lowest estimated average income of the six segments. Since a high proportion said their annual household income in 2014 was in the lowest category of $60,000 or less, their segment affiliation was probably based on hard reality.

- **Health** was important in the next group which included 20% of buyers. The segment had high loadings on local food’s “better nutritional value” and believed that it was “healthier for you.” These self or family-centered respondents were not motivated by such grand ideas as providing benefit to the Alberta economy.

They were overrepresented in the “Certified Organic + Ingredients” and “Unregulated Organic/Natural” production segments and slightly more concerned about food provenance. They were much less likely to be in the “Keep it Simple” segment. The total
picture was of people who need or want to be steeped in understanding of the food they buy and will go to some lengths to find exactly the right products.

Those motivated by Health were slightly more likely to fall into the Fringe shopper segment, mostly accounted for by their purchase of local food in drug stores.

Demographically, a higher than average proportion was in the youngest age group, 18-34 years.

- **Fresher/Better** described the main advantages to this sizeable segment (17%). Members selected the phrases “fresher” and “tastes better” as their drivers and were also the most likely to choose “better appearance” as a reason for buying local food. They were much less likely than average to be motivated by the notion of supporting Alberta’s small family farms.

Respondents in this segment were more likely to walk this talk, by growing food for their own consumption at home.

The segment was notable for its strong presence among empty nesters and in the age 65+ cohort and low incidence among younger singles aged 18-44. They were especially likely to be married and had the highest household income of all the segments. This was influenced by their greater likelihood of having a household income over $140,000.

- **Sensory Stimulus** described a small segment of 9% who enjoyed the atmosphere or experience of shopping for local food and liked to find different, specialty or ethnic foods. The segment also selected “tastes better” more often than average, suggesting that local food shopping might be an immersive sensory experience. They were not interested in knowing the story behind the food, just in the easily accessible inputs.

A very high proportion of these respondents were Mainstream shoppers, so one has to wonder whether their answers represented the mystique of local food (or farmers’ markets) rather than action to find it on a regular basis. They were underrepresented in the Rural shopper segment and, consistently, were overrepresented in the City of Calgary.

Those who had not been born in the Calgary Region had greater than usual hesitancy about calling Calgary “home.” They were more likely to include young school-aged and teen families where the youngest child was aged between 6 and 17 years and the parents 35-54 years. Very few had the lowest level of education of high school or less.

- **Producer relations** were most important to 8% of the market. Three motives were especially favoured by this segment: “have a good relationship with the producers,” “easy to order” and “other” attributes, notably environmental benefits. This segment also liked the notion of supporting Alberta’s small family farms and small independent businesses … and rejected taste as a reason for buying local food.

They were overrepresented in the Alternative shopper segment (buying clubs and CSA or farm box programs) and quite unlikely to be Mainstream local food shoppers.
Segment members who had not been born in the Calgary Region were less likely to call it “home.” They were more likely than average to be young bachelors and not aged 65+.  

**BARRIERS TO PURCHASE**

**Main barriers**

Two items led the list of reasons people put forward to explain what inhibits their purchase of local food (see Chart 27). The first was seasonality, which restricts choice of what is available at any time, but above all in winter. This concern was easily understood within the context of the foods that were purchased or desired, since fresh produce led both lists.

<table>
<thead>
<tr>
<th>Chart 27: What are your top 3 barriers or concerns that makes it difficult or inhibits you from purchasing local food? (Base: Total purchasing local food or intending to do so n=965)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Percent of respondents</strong></td>
</tr>
<tr>
<td>Only seasonal availability</td>
</tr>
<tr>
<td>Affordability/cost of local food</td>
</tr>
<tr>
<td>Limited variety/selection</td>
</tr>
<tr>
<td>Need labelling/signage to show it is local</td>
</tr>
<tr>
<td>Need information on how, when and where to buy</td>
</tr>
<tr>
<td>Too far for you to travel/time to get there</td>
</tr>
<tr>
<td>Limited or inconvenient hours</td>
</tr>
<tr>
<td>Lack of promotion of why to buy</td>
</tr>
<tr>
<td>Don’t think about it</td>
</tr>
<tr>
<td>Quality doesn’t meet expectations</td>
</tr>
<tr>
<td>Cost of your transportation</td>
</tr>
<tr>
<td>Misleading marketing</td>
</tr>
<tr>
<td>Don’t trust it</td>
</tr>
<tr>
<td>Extra food preparation time</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Don’t know</td>
</tr>
<tr>
<td>None of the above</td>
</tr>
</tbody>
</table>

First choice
Second choice
Third choice
Total
The second concern – and for the respondents choosing it, proportionately more often their top barrier – was affordability or price. In this case, both Price Driven and Price Conscious respondents were very likely to choose “affordability/price” as a barrier (see Chart 28).

Less frequently selected than the top two, but still chosen by almost one-in-three, was the limited selection to choose from and the need for signage and labelling, as well as information about what is local and about how to find local products.

Distance/travel time, restricted hours of operation and a need to better understand – and be reminded of – why to buy local, were each selected by more than 10%.

**Barrier segments**

Factor analysis was conducted on these results with five themes emerging. These themes or components are shown in Table 22.

**Table 22: Barriers**

<table>
<thead>
<tr>
<th>Component</th>
<th>Access</th>
<th>Overhyped</th>
<th>Information</th>
<th>Seasonality</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Too far for you to travel/ time to get there</td>
<td>-.659</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Need labelling/ signage to show it is local</td>
<td></td>
<td>-.546</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited or inconvenient hours</td>
<td></td>
<td></td>
<td>.523</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost of your transportation</td>
<td></td>
<td></td>
<td></td>
<td>.416</td>
<td></td>
</tr>
<tr>
<td>Misleading marketing</td>
<td></td>
<td></td>
<td></td>
<td>.701</td>
<td></td>
</tr>
<tr>
<td>Quality doesn’t meet expectations</td>
<td></td>
<td></td>
<td></td>
<td>.606</td>
<td></td>
</tr>
<tr>
<td>Don’t trust it</td>
<td></td>
<td></td>
<td></td>
<td>.566</td>
<td></td>
</tr>
<tr>
<td>Need information on how, when and where to buy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>.735</td>
</tr>
<tr>
<td>Extra food preparation time</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
</tr>
<tr>
<td>Don’t know</td>
<td></td>
<td></td>
<td></td>
<td>-.760</td>
<td></td>
</tr>
<tr>
<td>None of the above</td>
<td></td>
<td></td>
<td></td>
<td>-.529</td>
<td></td>
</tr>
<tr>
<td>Affordability/cost of local food</td>
<td></td>
<td></td>
<td></td>
<td>.452</td>
<td></td>
</tr>
<tr>
<td>Only seasonal availability</td>
<td></td>
<td></td>
<td></td>
<td>.401</td>
<td></td>
</tr>
<tr>
<td>Lack of promotion of why to buy</td>
<td></td>
<td></td>
<td></td>
<td>-.630</td>
<td></td>
</tr>
<tr>
<td>Don’t think about it</td>
<td></td>
<td></td>
<td></td>
<td>-.541</td>
<td></td>
</tr>
<tr>
<td>Limited variety/ selection</td>
<td></td>
<td></td>
<td></td>
<td>.474</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>*</td>
</tr>
</tbody>
</table>

*Only loadings of .400 and over are shown.
Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.
Rotation converged in 10 iterations.
The highest factor loading score was then used to classify respondents by their dominant theme, with the distribution shown in Chart 29.

- **Selection.** The largest group (29%) indicated that their biggest barrier to purchasing local food was the limited variety or selection offered. Segment members did not need convincing and were unlikely to say they didn’t think about local food – purchase was simply limited by availability. This was accompanied by a higher than average level of concern over seasonal availability.

  Segment members appear to help fill in the gaps in supply themselves; more than average grew some form of food for their own consumption.

  They had the highest average household income.

- **Access** was the key barrier for 24%. The main issues were the distance or time it would take to get to where they buy local food and limited or inconvenient hours of operation. Transportation costs weighed into the Access mix as well.

  Access barriers were mentioned more often by Mainstream shoppers and less by those visiting Specialized stores. Motivators found more often were of the Sensory Stimulus variety while those identified less were Economic Benefits. Based on all of the above, it was highly likely that the individuals in this segment were focused on farmers’ markets as the place to find local food.

  These barriers were a particular disincentive to young couples and the 18-34 years cohort as well as university educated respondents. Household income in the segment was lower than average and it included a higher proportion of Price Driven and Price Conscious buyers.

- **Information** – or rather the need for information – was the main barrier for 24%. The particular needs were to “know how, where and when to buy” and for labelling or signage at the point of purchase. It was interesting that selection of “extra food preparation time” as a barrier, which was rarely mentioned at all, almost always occurred in this segment. As will be seen in the next section of the report, it was this group that would be more interested in recipes that accompany new or unusual foods. These results clearly imply that they need to be of the “quick and easy” variety.

  This segment was more likely to pick Economic Benefits as reasons for buying local food, but not (both consistently and understandably) Producer Relations.
Cost & Seasonality were both concerns to 13%. Affordability issues alone crossed all segments, but were a stronger barrier in this group when also combined with seasonal availability issues. This segment was very clear about knowing what restricted their purchase of local food and it was not simply price, though a higher proportion of Price Driven buyers (but not Price Conscious buyers or those to whom price was less important) were in the segment.

The segment was less likely to include Alternative market channel shoppers and fell more often into the Protect the World production segment. They were more often found in the Economic Benefit motivation segment.

They included a lower proportion of households with a member who had been born and raised outside Canada and were more likely to have been born elsewhere in Alberta.

Overhyped is the term used to describe the small group of 11% who simply did not buy into the story of local food. Just about everyone that picked the following concerns was in this segment: “misleading marketing,” “quality doesn’t meet expectations” and “don’t trust it.”

Those who see local food as overhyped were more likely than average to identify their motivators for buying local food in the Sensory Stimulus segment.

They were strongly overrepresented among males and overrepresented among respondents who had been born outside Canada as well as those with a post-secondary education. They were less likely than average to include young couples.

Perceptions of Food and Agriculture Issues

A number of opinions of local food were voiced in the focus groups that were of interest. Consumer perceptions of challenges that face local producers were also of interest. These were covered in a question where all respondents were asked to rate their agreement with statements addressing the issues.

Overall, none of the statements had particularly strong support, but some generated very strong disagreement.

Production Costs

Three statements dealt with costs. The first, “It costs more for the farm to follow organic practices” was introduced because there seemed to be confusion in the focus groups over whether local food was organic food, yet there were negative perceptions of local food prices. Some focus group respondents thought local food was organic, or followed organic practices without necessarily being certified. Others just felt reassured that if food was local it would be
better/healthier than some imports. The question was whether there was a willingness to pay more for local food.

As may be seen in Chart 30, over half of the respondents (60%) acknowledged that organic practices were more expensive for the farm, while one quarter expressed a lack of knowledge (26% – including 15% who neither agreed nor disagreed plus 11% who did not know).

People in the highest income group were most likely to agree, while those born elsewhere in Alberta were least likely to do so.

Despite the perceptions of local food outlined above, lowest agreement was found for the statement, “The consumer should be prepared to pay more for local food.” In fact, 60% rejected the idea and only one-in-five (21%) supported it. In the Cost & Seasonality barrier segment, rejection rose to 73%, with especially strong disagreement being expressed. The Overhyped barrier and Fringe market channel segments were also more strongly opposed than average.

The role of price in making food choices influenced these responses, but it was primarily the most price sensitive group (and the lowest income group) that was adamantly opposed to paying more, as may be seen in Chart 31. Nevertheless, even among respondents to whom price was not a dominant factor, rejection was still high. Despite the perceptions of local food outlined above, lowest agreement was found for the statement, “The consumer should be prepared to pay more for local food.” In fact, 60% rejected the idea and only one-in-five (21%) supported it. In the Cost & Seasonality barrier segment, rejection rose to 73%, with especially strong disagreement being expressed. The Overhyped barrier and Fringe market channel segments were also more strongly opposed than average.

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choice criterion – particularly those with a university degree and 18-34 year olds – only one-in-four agreed that local food could cost more.

Although the Certified Organic + Ingredient List production segment was more supportive of higher costs than average, the majority still disagreed. If the underlying assumption of local food being equated to organic food was true in the cross-section of the population interviewed in the survey, there was a very wide discrepancy between understanding an issue facing producers and being prepared to personally accept its implications. Even if local food was not generally perceived as being organic, Calgary Region consumers made it abundantly clear that they were not prepared to pay more for it, regardless of their ability to do so.

The cost-related item that has been referenced throughout this section as the role of price in purchase decisions was based on the statement “When I have a choice, I tend to buy cheaper food items.” As may be seen in Chart 30, more than half agreed, indicating that price was a decision making criterion in the majority of Calgary Region households. The 16% that strongly agreed were termed Price Driven. The 40% who said they “agree somewhat” were termed Price Conscious. All others who responded fell into the Price is Less Important group, though almost all of them still had their limits. The relationship of these groups to price as a motivator, affordability as a barrier and to willingness to pay more for local food has been reported in the relevant sections.

There were also demographic differences. Most notable was that as household income declined the rate of endorsement of the statement rose. Single/unmarried individuals agreed more often, while empty nesters and the 55+ age groups were less opposed.

Selection of foods available

Three statements were included that had implications for the selection of foods available (Chart 32).

There was strong agreement that “Alberta can grow much more variety – there is no reason it should come from other countries,” with over half agreeing. That means there was a general expectation that more could be done to overcome the limited selection/variety barrier … but not in the Selection segment that claimed this barrier as their own (disagreement was voiced by 29% in the segment vs. the 23% average).

University educated respondents were less likely to believe this to be true while households in the lowest income group supported the view far more often.

How this greater variety was to be achieved does not seem to be by having “Alberta farmers [should] grow something new or different,” but may be by having a more consistent and/or accessible supply of what is already grown. Half the population sat on the fence on this
question, suggesting that they may not have known the full range of what was already being offered, or they may not have been able to envision just what was feasible that could increase the variety of foods produced locally. Among the other half, more supported the idea (31%) than were against it (17%).

Greatest support for the idea of more local variety was voiced by Fringe market channel users and in the Health motivation segment. Lowest support was seen among the Keep it Simple and Less is More production segments. Demographically, the most important difference was found for immigrants, who supported the idea, possibly hoping to see more foods from their home countries produced fresh locally. The idea was opposed more often in the Region than the City.

Calgary Region residents were very supportive of local producers when they mostly disagreed that “Alberta farmers don’t know what consumers want.” Very few agreed (9%), with most of the rest not being able to decide one way or the other.

Agreement was highest in the Overhyped and Fringe market channel segments and among immigrants, whether the respondent or a household member. Agreement was lowest where the primary motivations were Economic Benefits and in the Cost & Seasonality segment, as well as among those born in Alberta outside the Calgary Region. It was also lower in the Region than in the City of Calgary.
Promotion of local food

Two statements referenced promotion. There have been recent and long term efforts to promote local foods under a variety of banners in the Calgary Region. There was little recognition of any of them in the focus groups and costs for achieving the reach and frequency necessary to gain broad recognition may well be beyond the capacity of the organizations involved. One of the options available to producers is to increase their efforts in reaching out to their customers as measured by the statement, “Individual farms or small groups of Alberta farms should promote directly to the consumer.” The results are shown in Chart 33.

There was a great deal of support for the idea (70%), especially from families (younger and older) and people below the age of 65. It was highly likely that these groups would be hoping for communications via social media and/or e-mail alerts. Another really enthusiastic group was immigrants individually and immigrant households. In view of their overrepresentation in the Fringe market channels, it was likely that they are cut off, at least to some degree, from existing local food communication efforts. This would not be a language issue per se, since all survey respondents completed the interview in English.

Unfortunately, the segment for whom a lack of information was the biggest barrier to buying local food was no more enthusiastic than average, since it didn’t really address their basic needs. However, they were more responsive to the idea of recipes (“I’ll try new or unusual local foods if they come with recipes”) as discussed previously (60% positive).

In all, recipes to encourage trial of new or unusual foods resonated with just over half the respondents, with very few rejecting the idea entirely. It is a sound and popular strategy, already well entrenched in the food industry. Rural channel shoppers were more receptive to the idea of recipes, as were young families with children under 12 years of age and females. The Overhyped and Keep it Simple segments were less supportive than average.
Knowledge of farming

The only focus group participants who appeared to be spontaneously aware of issues facing producers were themselves connected to the agriculture community, either through family or friendship ties. Farm and Food Care Ontario had discovered much the same thing in their research. They have found it useful to track knowledge of and interest in knowing more about farming practices. A similar approach was adopted here to quantify the situation in the Calgary Region. The outcomes may be seen in Chart 34.

It may come as a surprise for a southern Alberta location, but only one-in-five (22%) residents agreed that, “I am knowledgeable about Alberta farming practices,” while almost half (48%) disagreed. Despite appearing to understand the economic impacts of buying local food, the Calgary Region market had little depth of knowledge about farm operations.

Greatest knowledge appears to reside in the Known Provenance and Certified Organic + Ingredient List production segments and among those for whom Selection limitations were their biggest barrier. It would appear that they not only seek knowledge, but have relatively more knowledge.

On the other hand, less knowledge was found in the Protect the World production segment and among Mainstream shoppers.

There were interesting differences from a demographic perspective as well. Young singles/couples aged 18-34 were less likely to feel knowledgeable as did immigrant households. More knowledgeable individuals lived in the Region and were frequently found in the 55+ age groups and among males.

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2 Farm and Food Care Ontario. Study of Canadian Attitudes towards Food and Farming 2012.
A far more positive result was that well over half (60%) indicated they had some interest when responding to the statement, “I want to know more about Alberta farming, agriculture and local food.” Note that this was not “learning” more but “knowing” more, with very different implications for the communication of such information.

The most enthusiastic groups were not defined by market channel. They included the Certified Organic + Ingredient Lists and Protect the World production attribute segments in particular, for presumably obvious reasons. Health motivations, Information barriers and Unregulated Organic/Natural production segments were others that stood out as wishing to know more. Immigrant households also wanted to know more.

Those with a well below average desire for increased knowledge were the Keep it Simple and Price Driven groups.
Expenditures on local food by market channel

Each local food purchaser answered questions about shopping frequency and spending on local food for up to four market channels. In practice, 80% of respondents provided expenditure information for each of the channels where they purchased local food, based on either a “yes” or “assume yes” response. For respondents using more than four outlets, an algorithm that placed higher emphasis on selected market channels of greater interest to AF was applied to select four.

Based on feedback from the focus groups, information on the D2C channels was requested separately for two seasons, roughly based on farmers’ market schedules. Summer was defined as May to October 2014 and winter as November 2014 to April 2015 (not coincidentally the month prior to the date selected for the survey to start).

Focus group respondents preferred shorter periods for the D2I channels as this would allow them to adjust for changes in shopping patterns, for example, in the summer barbeque months or over Christmas. As a result, information was requested for each of four quarters, starting with Q2 April to June 2014 and ending with Q1 January to March 2015.

There were two exceptions to these patterns. CSA or farm food box programs and restaurants and other food service establishment users were asked for information for a 12 month period, from May 2014 to April 2015.

The results shown in the expenditure section for restaurants and other food service establishments are based on a subset of all respondents selected to complete this information. The explanation for this is provided in Appendix III.

Timing of local food purchases (seasonality)

An initial screening question determined whether the respondent had purchased local food at each applicable outlet in each season (D2C) or quarter (D2I). The D2I results are shown in Chart 35 and D2C in Chart 36.

The four D2I stores showed very similar patterns of purchase. Shopping for local food occurred more frequently in the third quarter by between two-thirds and three-quarters of households using each outlet. This makes intuitive sense, as produce was often the first thought when considering local food and summer would be peak season for this.

Consistently the next highest, at around 60%, was the second quarter, probably for a similar reason. The rate of purchase of local food declined in the fourth and then again in the first quarter, but only by a small amount. The decline was most noticeable for specialty stores and small grocery stores.
Chart 35: In the past 12 months, did you purchase local food from a … [outlet] in … [quarter]? - D2I outlets
(Base: Certain or assumed they had bought local food at each outlet)

<table>
<thead>
<tr>
<th>Outlet Type</th>
<th>Q2 2014</th>
<th>Q3 2014</th>
<th>Q4 2014</th>
<th>Q1 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant etc. chosen for Local Food (n=126)</td>
<td>58%</td>
<td>70%</td>
<td>61%</td>
<td>57%</td>
</tr>
<tr>
<td>Health food, organic or natural food store (n=373)</td>
<td>54%</td>
<td>56%</td>
<td>57%</td>
<td>55%</td>
</tr>
<tr>
<td>Ethnic grocery store (n=183)</td>
<td>60%</td>
<td>67%</td>
<td>60%</td>
<td>50%</td>
</tr>
<tr>
<td>Specialty store (n=378)</td>
<td>63%</td>
<td>67%</td>
<td>63%</td>
<td>56%</td>
</tr>
<tr>
<td>Small grocery store (n=194)</td>
<td>52%</td>
<td>56%</td>
<td>52%</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>

^Note extremely small bases.

Chart 36: In the past 12 months, did you purchase local food from a … [outlet] in … [season]? - D2C outlets
(Base: Certain or assumed they had bought local food at each outlet)

<table>
<thead>
<tr>
<th>Outlet Type</th>
<th>Summer 2014</th>
<th>Winter 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farmers’ market (n=478)</td>
<td>94%</td>
<td>39%</td>
</tr>
<tr>
<td>Directly from a farm or ranch (n=165)</td>
<td>89%</td>
<td>40%</td>
</tr>
<tr>
<td>Online-only supplier (n=39)^</td>
<td>Base too small to report</td>
<td>Not applicable</td>
</tr>
<tr>
<td>CSA or farm box program (n=44)^</td>
<td>Base too small to report</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Buying club (n=23)^</td>
<td>Base too small to report</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>

^Note extremely small bases.
Purchase patterns at D2C channels showed a far higher level of seasonality. In all cases, shopping for local food was far more likely to take place at least once in summer than in winter. The most extreme differences were found for farmers’ markets and farm retail.

As a result of the small sample bases for online-only suppliers, CSA or farm box programs and buying clubs, the data in this section have been suppressed.  

**Frequency of Purchase by Season or Quarter**

Respondents were asked how often they had purchased local food from each D2I and D2C market channel in each season or quarter. Average purchase frequency among buyers in the period is shown in Charts 37 and 38.

Note that each period is based only on households that purchased in that timeframe, so averages cannot be added. The annual total was calculated for each respondent separately before being averaged.

Perhaps most notable about the D2I results was the close clustering of the average purchase frequency reported in each quarter. The most pronounced difference was found for small grocery stores, which people appear to visit more often in the second quarter than other periods of the year.

Frequency was also marginally higher in the second quarter for health food, organic or natural food stores and specialty stores, while ethnic grocery stores peaked in the fourth quarter.

Small grocery stores stood out as enjoying more purchase visits regardless of quarter, on average, once every two weeks. The impact of this difference can be seen even more clearly in the number of visits made annually. The average for small grocery stores was 14.4, well above the 9.6 average for health food, organic or natural food stores, the next most frequently visited. This was followed by restaurants (9.0), ethnic grocery stores (8.9) and specialty stores (8.1).

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3 Should written documents repeat findings about the use of online-only suppliers, CSA or farm box programs and buying clubs, they must include a cautionary note about the small sample size on which the results were based. This includes findings noted throughout the report.
Chart 37: Average number of purchases by season and for the year - D2I outlets
(Base: Certain or assumed they had bought local food at each outlet)

Note: Quarterly averages do not add to the 12 month total as not everyone bought in each quarter.
Bases represent the total or annual base for each outlet. Quarterly bases were smaller.

Chart 38: Average number of purchases by season and for the year - D2C outlets
(Base: Certain or assumed they had bought local food at each outlet)

Note: Summer and winter averages do not add to the 12 month total as not everyone bought in both seasons.
^ Extremely small bases.
Bases shown represent the total or annual base for each outlet. Seasonal bases were smaller.
Among the D2C market channels, the average frequency of farm retail purchases was almost identical in summer and winter. The picture was different for farmers’ markets, with the summer period enjoying far more visits than the winter.

Annual frequency for farmers’ market purchases was 6.9, followed by farm retail at 6.2, considerably lower than for the D2I stores.

Chart 39 provides additional detail on the number of purchases made annually at each market channel.

Looking first at the D2I results, it was evident that small grocery stores stand out in attracting households to make more than one trip per month (14+ purchasing trips per year). They also had their fair share of occasional shoppers who purchased only once or twice a year. As a result, their business appears to be split more than most between high and low frequency customers (customers shopping 3-4 times per year being less likely to be found). The remaining D2I stores and restaurants showed patterns of shopping frequency and loyalty that were similar to one another. Median use was 4 times per year, with half making purchases less often and half visiting more often.

The same median applied to farmers’ markets in the D2C category. However, since relatively few households made only one visit to a farmers’ market, a more useful insight might be that...
41% – a higher than average proportion – made between three and six purchasing trips per year.

The median for farm retail was three purchases, lower than the other market channels under investigation.

**PER PURCHASE SPENDING BY SEASON OR QUARTER**

Respondents were next asked how much they spent on average on local food for each purchase in the season or quarter. Rather than generate a value, focus group respondents strongly preferred to pick from a list of suggested categories. That method was adopted for the survey, using categories constructed in $10 increments for most channels. Averages were calculated on the category mid-point.4 Average per purchase spending on local food among D2I buyers in each period is shown in Charts 40 and 41.

Once again, averages for each period were based only on households that purchased in that timeframe, so they cannot be added. Total spending for the year was calculated for each respondent separately before being averaged.

The results for D2I channels show even greater clustering in each quarter, suggesting that while there were minor differences in frequency of purchase, average expenditures across the quarters did not vary much at all.

Substantially higher per purchase spending on local food was found at ethnic grocery stores in every quarter. This spending, despite being combined with an average frequency of purchase, generated the highest total expenditure over a 12 month period ($670).

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4 The few respondents who checked the highest category were asked to specify what they had spent. The average was then applied to that category, separately calculated for each market channel.
Chart 41: Average spending per purchase each quarter - D2I outlets
(Base: Certain or assumed they had bought local food at each outlet)

Chart 40: Average spending over 12 months - D2I outlets
(Base: Certain or assumed they had bought local food at each outlet)
The second highest spending level over a 12 month period was generated by small grocery stores ($610). These stores enjoyed far higher than average purchase frequency, but only average per purchase spending on local food. Clearly, both purchase frequency and per visit spending affect the bottom line.

Total local food spending for health food, organic or natural food stores and specialty stores followed at $457 and $390 respectively, much lower than ethnic grocery stores despite a similar number of purchase trips.

Charts 42 and 43 show spending information for D2C market channels.

Average per purchase spending on local food purchased directly from farms shows the most notable seasonal differences, with average winter spending 75% higher than summer – and higher averages than for the other D2C channels.

Falling more in line with the D2I stores, average spending on local food at farmers’ markets was similar in each season, but substantially lower than for the other D2C channels. Total expenditures over a 12 month period averaged $293, below that of D2I stores.

Observations that may be made from Chart 44 include:

- Median expenditures on local food for all channels under investigation other than restaurants fell in the $101 to $250 category. The medians were:
  - Restaurant or other eating establishment: $300
  - Health food, organic or natural food store: $165
  - Ethnic grocery store: $150
  - Specialty store: $150
  - Small grocery store: $190
  - Farmers’ market: $170
  - Directly from a farm or ranch: $190
Chart 42: Average spending per purchase each season - D2C outlets
(Base: Certain or assumed they had bought local food at each outlet)

Chart 43: Average spending for the year - D2C outlets
(Base: Certain or assumed they had bought local food at each outlet)

Note: Summer and winter averages do not add to the 12 month total as not everyone bought in both seasons.

^ Extremely small bases.
Bases represent the total or annual base for each outlet.
- D2I channels all had a fairly high proportion of respondents whose spending was $50 or less for the 12 months.
- D2C purchases tended to be higher over the 12 months, especially in the over $50 to $500 categories for farmers’ markets and farm retail.
Market value of local food by channel

Using an estimated population of 543,000 households in the study region, total expenditures on local food for the 12 month period April/May 2014 to March/April 2015 were projected. The results are shown in Chart 45.

Among the 10 market channels investigated, the one with the highest value was restaurants or other eating establishments chosen specifically because they made food with local ingredients. Total estimated spending was $136 million. Restaurants and other eating establishments in general were widely and well known, and enjoyed a high proportion of respondents who had eaten local food there. Growth potential for local food, however, appeared to be limited.

Second in value at $106 million was local food sold at farmers’ markets. This channel had the highest level of awareness and knowledge and the largest proportion of local food purchasers among the D2C channels. It also had a greater opportunity for future growth in local food sales than any other market channel investigated.

In third spot was health food, organic or natural food stores, where estimated retail expenditures on local food edged out ethnic grocery stores, in fourth place ($92 million and $87 million respectively).

The remaining D2I market channels, specialty stores and small grocery stores were next at $79 million each.
Spending on local food at farm retail outlets was estimated at $55 million, roughly half the value of farmers' markets.
Conclusions and recommendations

The survey findings lend themselves to a number of conclusions regarding actions that could be taken to facilitate increased demand for local food. Some of the actions involve marketing and some relate to production.

Marketing actions

The first issue is awareness and familiarity.

- With the very successful exception of farmers’ markets, most D2C market channels are handicapped by being virtually unknown. Basic awareness creation means being informed of the existence of such options as buying clubs, CSA or farm box programs and online-only suppliers. This is the first step to increasing demand for these outlets.

  While more widely known, farm retail, with its myriad types and locations of physical outlets, remains unknown to almost half the potential market in the Calgary Region.

  Effective publicity, whether through advertising, public relations, promotions, word-of-mouth or something else, is essential to creating the necessary awareness.

- D2I stores, including health food, organic or natural food stores, ethnic grocery stores, specialty stores and small grocery stores enjoyed extensive awareness, but depth of knowledge, as revealed by familiarity ratings, was limited. This key hurdle is often the result of not actually having visited or used the channel, or not having done so recently. There remains considerable room for improvement in exposure to the D2I outlets available in the Calgary Region.

  Among the D2C channels, online-only suppliers, CSA or farm box programs and buying clubs were similarly challenged by low familiarity, even among those aware of them.

  For market activation, it is essential that exposure occurs to outlets and that potential buyers enjoy a positive experience while there, whether in a built facility or on a website.

The next issue is where potential growth in the purchase of local foods will come from. This should drive further marketing efforts.

- One of the growth sources is represented by openness to using new market channels. Lack of interest will limit the potential for market growth from new sectors of the population.

  The survey suggested that the majority of the population (53%) was not interested in actively seeking out any new or unknown market channels, based on the written descriptions provided.
The D2C channels – buying clubs, online-only suppliers, farm retail and CSA or farm box programs – as well as small grocery stores, all showed evidence of appealing to niche markets, since many more respondents said they would not seek them out than were prepared to try them.

Nevertheless, the amount of interest that was expressed translated into real potential for proportionately significant gains in the above D2C channels and also in specialty stores.

- For farm retail and specialty stores even larger impacts could be experienced by converting existing shoppers who do not buy local food there, to local food purchasers. Active in-store promotion of local food products will be needed for this to happen.

The same applies to farmers’ markets, though here the issue may be one of supply of local foods, rather than items imported from other provinces or countries. Farmers’ markets are pivotal to the image of local food and noticeable movement away from local sourcing could risk the credibility of the entire local food movement.

- The final segment that can contribute to growth is existing customers. Those who already buy these products can increase their purchases of local foods. Based on the survey results, it is anticipated that growth from existing buyers will be most significant for farmers’ markets, provided that they are encouraged to follow-up on this intention.

In addition, all D2I channels should actively cultivate their existing customer base. As with other growth opportunities, customers will require support for the increased propensity to purchase to actually come to fruition, whether it be in marketing or assuring that product is available or both.

Restaurants, the only counter-trend channel, appear to be most at risk of being affected by loss of existing customers. There was no evidence that this might be the result of income factors, suggesting that there may be a need for renewed emphasis on marketing local ingredients. The trend should not preclude creating novelty by featuring the hot new flavour of the year beloved of professional chefs; that could still be featured alongside the values attributed to local food.

There were several respondents who pointed out that promotion of local food items carried in stores or used by a restaurant is necessary for them to identify and favour the product. This is where they make their decisions and efforts to support them at the point of purchase are vital. That should also include better labelling of local products.

*Purchasing behaviour, psychographics and demographics* present specific opportunities to improve channel marketing and to target local food market sectors.

- For farmers’ markets, the flagship local food channel, it will be important to take advantage of the psychographic results of the survey if growth in trip frequency and/or spending per trip is to be achieved from within the existing market. Fresher/Better and Sensory Stimulus (e.g., tasting options, a busy exciting atmosphere) were distinctive motivators that should be
reinforced and promoted, along with continuing to support Known Provenance as a production attribute.

- An incidental behavioural finding is of interest. People who buy local food through a buying club or CSA or farm box program tended not to shop at farmers' markets. The implication for convenient-to-the-farmer box pick-ups at farmers’ markets is that other arrangements may prove to be more attractive in nurturing these nascent D2C channels.

- For the second most important D2C channel, farm retail or purchasing directly from a farm, increasing frequency of purchase among existing customers should be the key objective. Promotions (e.g., in-bag coupons, online production schedules and/or e-mail notification of new product arrivals) would be one way that this could be achieved, while also strengthening Producer Relations and Known Provenance motivators. Showcasing the product line as it will and does evolve over time is crucial as Selection was the single largest barrier to purchase at this channel.

- Mainstream shoppers, the largest segment of the market when defined by shopping channel (supermarkets, mass merchandisers, club stores and restaurants and other eating establishments), appeared to be relatively unconcerned about local food, often lacking interest in diversifying local food purchases. Fresher/Better was an above average incentive for local food shopping at mass merchandisers, and Certified Organic + Ingredient List at supermarkets.

- The need for information – particularly to “know how, where and when to buy” and for labelling or signage at the point of purchase was a very important barrier to identifying and buying local food. Obviously, new and more visible labelling and signage would help to address the concern, along with promotion of local products under an appropriate banner. This type of information was needed more by small grocery store shoppers and appeared to be better satisfied by health food, organic and natural food stores.

- The segment with this need also considered “extra food preparation time” to be a barrier to use of (presumably fresh) local foods, but was receptive to recipes that might accompany new or unusual foods. Recipes would provide an incentive to buy local, provided that preparation was visibly quick and easy.

- Health was an important motivator for use of health food, organic or natural food stores. Favoured production attributes included Certified Organic + Ingredient List and Unregulated Organic/Natural, which are clearly satisfied by the product line at these outlets. Health motivated purchasers were also defined by the segments they did not fit into – Less is More, Keep it Simple, and Information – all of which draw a picture of a channel whose customers welcome knowledge that helps them make their own healthy choices.

- This study included 26% of households with one or more individuals who had both been born and raised outside Canada – a similar proportion to the 2011 National Household Survey where 26% of Calgary CMA residents were immigrants. Since it may be reasonably assumed that immigrant households (especially multigenerational households with older
family members) would like access to foods they had enjoyed in their home countries, there may well be an opportunity to market suitable local products through the channels especially favoured in the Fringe segment (ethnic food stores, drug stores and convenience stores) as well as individual outlets in other channels that have successfully focused on ethnic needs.

To compete with well-known brands from their home countries, the challenges will be to reassure this market segment of the quality of the local product and to provide it at competitive prices. Their concern about local food was very evident in that they were overrepresented in the Overhyped barrier segment and sought reassuring production attributes in both the Certified Organic + Ingredient List and Unregulated Organic/Natural segments.

Production values

In describing and explaining the marketing actions that could be embraced from the survey results, there was inevitably reference to the production attributes preferred by a segment or by shoppers at a particular channel. This information contributed valuable insight into their profiles.

In this section, consumer demand for production attributes is addressed from a producer perspective.

- The fact that there were no standout production attributes makes it difficult to be directed by simply accommodating the most popularly sought after characteristics. The highest mentioned attributes were reasonably widely held – “no preservatives, additives or fillers” and “no chemicals,” but did not go so far as to require organic certification or even an assurance that organic or natural farming practices should be followed.

- The six production attribute segments each told a fairly cohesive story about their values and preferences. By embracing the whole story rather than choosing a few more popular or convenient production values, it would be possible to both produce and market to a selected segment or segments with a product and story that will resonate with them.

- To emphasise the point being made, the segmentation exercise demonstrated how some commonly held values, like knowing where food is grown or raised, may be interpreted and used differently by different segments.

For example, consumer-producer relationships drove the small Known Provenance segment. By actually knowing, or knowing of, the farmers they felt little need to personally exercise vigilance about their products, even when many specific production attributes were demanded. In other segments, like Certified Organic + Ingredient List, knowing where food was grown or raised would allow purchasers to investigate and reassure themselves about the food being produced by a particular farm. The third segment that valued
production location knowledge was the Keep it Simple segment; here they appeared to place automatic trust in the food simply because it was locally produced.

Blindly promoting details about the producer without knowing the purpose of doing so could end up satisfying no one, or might be too narrowly focused on a segment that is too small or has important unmet requirements.

The same would apply to other production attributes which were either demanded or not valued in different segments.

- Local food needs to be competitively priced. Most survey respondents were price sensitive in general and opposed to paying more for local food in particular. This was often – but not always – because they cannot afford to pay more. If the mass market is the objective, as opposed to households with a very high income or that have many requirements of their food to ensure their own health, then competitive pricing is a core requirement.

The survey also addressed unmet locally produced food needs.

- There was strong agreement that “Alberta can grow much more variety – there is no reason it should come from other countries.” That means there is a general expectation that more could be done to overcome the selection/variety limitation barrier to buying local food. Despite acknowledging this to be a barrier, some people attribute it to Alberta’s capacity to produce only according to climate and natural resources and do not seek out further variety. Others look to greenhouse production to improve the selection that is available and when it is available.

- Current local food purchases appear to be dominated by the fresh produce category, especially vegetables. Meats, products made of grains, poultry, dairy/dairy products and poultry products were the only other sectors that came to mind in a substantive way.

Once prompted with a list of categories and examples, additional local foods were requested in all categories. Based on a very crude rank order, it appeared that dairy and dairy products, honey and grains may have the greatest opportunities for growth and diversification. New items were relatively less likely to be mentioned for grain products and produce.

- The following is a brief summary of the biggest opportunities in each category as expressed by local food purchasers and those who intend to buy local food in the next 12 months:

  - Meat items, already in substantial demand, were mentioned by the largest number of respondents. While continuing to be dominated by beef, a very high proportion of items mentioned were bison and lamb.
  - Dairy and dairy products were next, with cheese and milk being the most frequently mentioned items, followed by yogurt and butter; compared to current demand, more emphasis was placed on cheese, yogurt and butter for the future.
• The poultry category was overwhelmingly centred on chicken, with turkey a distant second and little interest in alternative fowl. Nevertheless, this was a change from current use which was almost exclusively chicken.

• The demand for produce was focused somewhat more on fruit than vegetables (which had stronger current demand). Berries of all types and in general dominated the fruit requests. A wide variety of sought after vegetables were named, with none being predominant.

• Poultry products named as current local food buys were exclusively eggs. Future demand would still be dominated by eggs, but there was particular interest in poultry sausage and poultry pot pies/pies.

• Products made of fruits and vegetables suggested the strongest value-added opportunity was for jams, but also salsa and pickles/pickled products.

• Honey was next, with interest being expressed in having various flavours, influenced by the blossoms visited by the bees. There was notable demand for raw/ unpasteurized/ natural/ real/ wild/ farm fresh honey, which suggest an advantage is to be gained based on perceptions of processed honey as less than pure.

• Meat products currently purchased were often sausages of various types. That demand has not yet been met as sausage was by far the most requested item. Meat pies were also of some interest.

• Highest demand for grains was for flours and oats. Flax and ancient grains also enjoyed a relatively high proportion of mentions.

• Herbs, especially fresh herbs, dominated the list in the herbs and spices category, with basil in most demand.

• Condiments and spreads received the lowest level of interest among the categories listed. Those who wanted to see a local item in the category chose salad dressings most frequently, followed by oils (cooking and flavoured), ketchup and mustards.

• The prompted categories did not include alternative proteins, alcohol and beverages, prepared food/meals or vegan/vegetarian options, which were noted under “other.”

• Some people specified production attributes (before they saw the question on the topic) as a general request or in combination with the items they listed. These attributes included: organic, non-GMO, gluten free, or sugar free products; salt free (including nitrates, sulphates and MSG) meat and poultry products; lactose free dairy and other products; or grass-fed, grain fed, free range animals, poultry and eggs.

Other issues

Other opportunities that were identified included the following:

• Few living in the Calgary Region considered themselves knowledgeable about Alberta farming practices. This means that the majority were really not in a position to assess local
producers and were left to make judgements based on impressions gained from other sources, including misinformation and no information at all.

In contrast, the majority wanted to know more about farming, agriculture and food, which offers a wonderful opportunity to communicate about the issues that face the agriculture community, including those concerning production practices. Immigrant households should be a particular target for this type of information.

The key will be to offer this information in “sound bites” (even if written) as “knowing more” has been shown to not be the same as the weightier and more demanding “learning more.” This applies whether a community-wide campaign is under consideration or a single farm wishes to talk about their concerns or practices. The only exceptions might be when targeting specific information-seeking segments, such as the Certified Organic + Ingredient Lists or Health motivation segments.

- The questions on what local foods respondents wanted to see, or see more of, proved to be confusing and onerous for some and were not as easily understood as hoped. However, they did generate a more comprehensive list of items than originally included in the examples. The expanded lists could form the basis for future quantitative measurements that would be easier for respondents to follow and easier to analyse and interpret.

- In addition, a question on the perception of local food as being organic or near-organic food may provide further insight into how pervasive this notion might be.
Appendix I:
Online survey sample distribution, response and incidence rates
Unweighted and weighted sample profile

The table below profiles the achieved or unweighted sample (un), and the final weighted distribution (n) on selected criteria.

<table>
<thead>
<tr>
<th>Profile of the unweighted (un) and weighted (n) sample</th>
<th>Achieved sample un=1,007 %</th>
<th>Weighted sample n=1,001 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Place of residence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City of Calgary</td>
<td>88</td>
<td>84</td>
</tr>
<tr>
<td>Region</td>
<td>12</td>
<td>16</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-34</td>
<td>17</td>
<td>23</td>
</tr>
<tr>
<td>35-44</td>
<td>20</td>
<td>22</td>
</tr>
<tr>
<td>45-54</td>
<td>25</td>
<td>24</td>
</tr>
<tr>
<td>55-64</td>
<td>22</td>
<td>17</td>
</tr>
<tr>
<td>65+</td>
<td>16</td>
<td>15</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>42</td>
<td>41</td>
</tr>
<tr>
<td>Female</td>
<td>58</td>
<td>59</td>
</tr>
</tbody>
</table>

Note: Figures do not always add to 100% due to rounding

Weighting corrected for imbalances in region of residence (based on November 2014 Canada Post household counts) and age (based on household maintainer profiles in the 2011 National Household Survey from Statistics Canada). It did not significantly affect the gender distribution which was validated against the Alternative Markets studies.
Sample response and incidence rates

A total of 20,242 invitations to participate were sent out, with responses being received from 2,501 panel members, for a 12% response rate.

Among those responding, 56 were rejected as quotas were full and 372 were incomplete.

1,007 completed the survey, which represents an incidence rate of 40% of all who responded.

The remaining 956 were screened but disqualified because they either did not meet specific sample or validation criteria.

The screened respondent distribution (n=2073) was as follows:

<table>
<thead>
<tr>
<th>Disqualified</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household member works in market research, media or advertising</td>
<td>3</td>
</tr>
<tr>
<td>Purchase food for commercial purposes</td>
<td>11</td>
</tr>
<tr>
<td>Not responsible for food shopping/ unable to report household expenditures</td>
<td>9</td>
</tr>
<tr>
<td>Not in correct age group (i.e. under 18)</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Not in geographic region (defined by FSA or postal code)</td>
<td>23</td>
</tr>
<tr>
<td>Failed to pass validation checks</td>
<td>2</td>
</tr>
<tr>
<td>Rejected for another reason</td>
<td>4</td>
</tr>
</tbody>
</table>

**Qualified and complete** 49

Note: Figures do not always add to 100% due to rounding.
Appendix II:
Demographic profile of local food purchasers
Chart 4: Are you responsible for shopping for food for your household?
(Base: Total purchasing local food from each channel)

<table>
<thead>
<tr>
<th>Channel</th>
<th>Fully responsible</th>
<th>Have major responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total respondents (n=950)</td>
<td>48%</td>
<td>52%</td>
</tr>
<tr>
<td>D2M - DIRECT TO MAINSTREAM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drugstore (n=210)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supermarket (n=881)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Convenience store (n=181)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Club store (n=579)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mass merchandiser (n=507)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2I - DIRECT TO INTERMEDIATED</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant or other eating establishment (n=658)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health food, organic or natural food store (n=373)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethnic grocery store (n=242)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specialty store (n=378)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small grocery store (n=241)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2C - DIRECT TO CONSUMER</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Farmers' market (n=673)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Directly from a farm or ranch (n=176)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online-only supplier (n=39)</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>CSA or farm box program (n=44)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buying club (n=26)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Percent of respondents

^Note extremely small bases.

---

Chart 5: Do you, or does any member of your household grow food (fruits, vegetables, herbs or something else) for your own consumption?
(Base: Total purchasing local food from each channel)

<table>
<thead>
<tr>
<th>Channel</th>
<th>Grow at home</th>
<th>Grow elsewhere</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total respondents (n=950)</td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>D2M - DIRECT TO MAINSTREAM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drugstore (n=210)</td>
<td>42%</td>
<td>5%</td>
</tr>
<tr>
<td>Supermarket (n=881)</td>
<td>41%</td>
<td>4%</td>
</tr>
<tr>
<td>Convenience store (n=181)</td>
<td>41%</td>
<td>4%</td>
</tr>
<tr>
<td>Club store (n=579)</td>
<td>41%</td>
<td>4%</td>
</tr>
<tr>
<td>Mass merchandiser (n=507)</td>
<td>39%</td>
<td>4%</td>
</tr>
<tr>
<td>D2I - DIRECT TO INTERMEDIATED</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant or other eating establishment (n=658)</td>
<td>40%</td>
<td>3%</td>
</tr>
<tr>
<td>Health food, organic or natural food store (n=373)</td>
<td>43%</td>
<td>3%</td>
</tr>
<tr>
<td>Ethnic grocery store (n=242)</td>
<td>43%</td>
<td>3%</td>
</tr>
<tr>
<td>Specialty store (n=378)</td>
<td>43%</td>
<td>4%</td>
</tr>
<tr>
<td>Small grocery store (n=241)</td>
<td>44%</td>
<td>5%</td>
</tr>
<tr>
<td>D2C - DIRECT TO CONSUMER</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Farmers' market (n=673)</td>
<td>43%</td>
<td>4%</td>
</tr>
<tr>
<td>Directly from a farm or ranch (n=176)</td>
<td>55%</td>
<td>9%</td>
</tr>
<tr>
<td>Online-only supplier (n=39)</td>
<td>46%</td>
<td>10%</td>
</tr>
<tr>
<td>CSA or farm box program (n=44)</td>
<td>49%</td>
<td>8%</td>
</tr>
<tr>
<td>Buying club (n=26)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Percent of respondents

^Note extremely small bases.
Chart 6: Place of residence
(Base: Total purchasing local food from each channel)

Chart 7: Was anyone in your household born and raised outside Canada?
(Base: Total purchasing local food from each channel)
Chart 8: Where were you born?
(Base: Total purchasing local food from each channel)

Percent of respondents

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total respondents (n=950)</td>
<td>29 14 39 19</td>
</tr>
<tr>
<td>D2M - DIRECT TO MAINSTREAM</td>
<td></td>
</tr>
<tr>
<td>Drugstore (n=210)</td>
<td>27 10 36 27</td>
</tr>
<tr>
<td>Supermarket (n=881)</td>
<td>29 14 39 18</td>
</tr>
<tr>
<td>Convenience store (n=181)</td>
<td>31 10 36 23</td>
</tr>
<tr>
<td>Club store (n=579)</td>
<td>32 14 36 18</td>
</tr>
<tr>
<td>Mass merchandiser (n=507)</td>
<td>30 12 39 18</td>
</tr>
<tr>
<td>D2I - DIRECT TO INTERMEDIATE</td>
<td></td>
</tr>
<tr>
<td>Restaurant or other eating establishment (n=658)</td>
<td>28 14 39 19</td>
</tr>
<tr>
<td>Health food, organic or natural food store (n=373)</td>
<td>31 13 38 19</td>
</tr>
<tr>
<td>Ethnic grocery store (n=242)</td>
<td>30 12 32 26</td>
</tr>
<tr>
<td>Specialty store (n=378)</td>
<td>30 13 39 19</td>
</tr>
<tr>
<td>Small grocery store (n=241)</td>
<td>29 15 41 15</td>
</tr>
<tr>
<td>D2C - DIRECT TO CONSUMER</td>
<td></td>
</tr>
<tr>
<td>Farmers’ market (n=673)</td>
<td>29 14 40 18</td>
</tr>
<tr>
<td>Directly from a farm or ranch (n=176)</td>
<td>28 15 40 18</td>
</tr>
<tr>
<td>Online-only supplier (n=39)^</td>
<td>35 6 42 17</td>
</tr>
<tr>
<td>CSA or farm box program (n=44)^</td>
<td>26 15 46 13</td>
</tr>
<tr>
<td>Buying club (n=26)^</td>
<td></td>
</tr>
</tbody>
</table>

*Note extremely small bases.
^Total for Calgary region including both urban and on farm/ranch.

Chart 9: Respondent gender
(Base: Total purchasing local food from each channel)

Percent of respondents

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total respondents (n=950)</td>
<td>41 59</td>
</tr>
<tr>
<td>D2M - DIRECT TO MAINSTREAM</td>
<td></td>
</tr>
<tr>
<td>Drugstore (n=210)</td>
<td>42 58</td>
</tr>
<tr>
<td>Supermarket (n=881)</td>
<td>42 58</td>
</tr>
<tr>
<td>Convenience store (n=181)</td>
<td>48 52</td>
</tr>
<tr>
<td>Club store (n=579)</td>
<td>42 58</td>
</tr>
<tr>
<td>Mass merchandiser (n=507)</td>
<td>42 58</td>
</tr>
<tr>
<td>D2I - DIRECT TO INTERMEDIATE</td>
<td></td>
</tr>
<tr>
<td>Restaurant or other eating establishment (n=658)</td>
<td>42 58</td>
</tr>
<tr>
<td>Health food, organic or natural food store (n=373)</td>
<td>36 64</td>
</tr>
<tr>
<td>Ethnic grocery store (n=242)</td>
<td>49 51</td>
</tr>
<tr>
<td>Specialty store (n=378)</td>
<td>45 56</td>
</tr>
<tr>
<td>Small grocery store (n=241)</td>
<td>45 55</td>
</tr>
<tr>
<td>D2C - DIRECT TO CONSUMER</td>
<td></td>
</tr>
<tr>
<td>Farmers’ market (n=673)</td>
<td>38 62</td>
</tr>
<tr>
<td>Directly from a farm or ranch (n=176)</td>
<td>44 56</td>
</tr>
<tr>
<td>Online-only supplier (n=39)^</td>
<td>31 69</td>
</tr>
<tr>
<td>CSA or farm box program (n=44)^</td>
<td>38 62</td>
</tr>
<tr>
<td>Buying club (n=26)^</td>
<td></td>
</tr>
</tbody>
</table>

*Note extremely small bases.
Chart 10: Which of the following age groups are you in?
(Base: Total purchasing local food from each channel)

- Total respondents (n=950)
  - D2M - DIRECT TO MAINSTREAM
    - Drugstore (n=210)
    - Supermarket (n=881)
    - Convenience store (n=181)
    - Club store (n=579)
    - Mass merchandiser (n=507)
  - D2I - DIRECT TO INTERMEDIATED
    - Restaurant or other eating establishment (n=658)
    - Health food, organic or natural food store (n=373)
    - Ethnic grocery store (n=242)
    - Specialty store (n=378)
    - Small grocery store (n=241)
  - D2C - DIRECT TO CONSUMER
    - Farmers’ market (n=673)
    - Directly from a farm or ranch (n=176)
    - Online-only supplier (n=39)^
    - CSA or farm box program (n=44)^
    - Buying club (n=26)^

^Note extremely small bases.

Chart 11: Household lifestage
(Base: Total purchasing local food from each channel)

- Total respondents (n=950)
- D2M - DIRECT TO MAINSTREAM
- Drugstore (n=210)
- Supermarket (n=881)
- Convenience store (n=181)
- Club store (n=579)
- Mass merchandiser (n=507)
- D2I - DIRECT TO INTERMEDIATED
- Restaurant or other eating establishment (n=658)
- Health food, organic or natural food store (n=373)
- Ethnic grocery store (n=242)
- Specialty store (n=378)
- Small grocery store (n=241)
- D2C - DIRECT TO CONSUMER
- Farmers’ market (n=673)
- Directly from a farm or ranch (n=176)
- Online-only supplier (n=39)^
- CSA or farm box program (n=44)^
- Buying club (n=26)^

^Note extremely small bases.
Chart 12: Which of the following best describes your marital status?  
(Base: Total purchasing local food from each channel)

<table>
<thead>
<tr>
<th>Category</th>
<th>Total respondents (n=950)</th>
<th>D2M - DIRECT TO MAINSTREAM</th>
<th>D2I - DIRECT TO INTERMEDIATED</th>
<th>D2C - DIRECT TO CONSUMER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total respondents (n=950)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2M - DIRECT TO MAINSTREAM</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drugstore (n=210)</td>
<td>19</td>
<td>38</td>
<td></td>
<td>43</td>
</tr>
<tr>
<td>Supermarket (n=881)</td>
<td>19</td>
<td>42</td>
<td></td>
<td>41</td>
</tr>
<tr>
<td>Convenience store (n=181)</td>
<td>19</td>
<td>36</td>
<td></td>
<td>44</td>
</tr>
<tr>
<td>Club store (n=579)</td>
<td>18</td>
<td>44</td>
<td></td>
<td>39</td>
</tr>
<tr>
<td>Mass merchandiser (n=507)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2I - DIRECT TO INTERMEDIATED</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant or other eating establishment (n=658)</td>
<td>18</td>
<td>38</td>
<td></td>
<td>45</td>
</tr>
<tr>
<td>Health food, organic or natural food store (n=373)</td>
<td>19</td>
<td>42</td>
<td></td>
<td>48</td>
</tr>
<tr>
<td>Ethnic grocery store (n=242)</td>
<td>17</td>
<td>36</td>
<td></td>
<td>54</td>
</tr>
<tr>
<td>Specialty store (n=378)</td>
<td>17</td>
<td>33</td>
<td></td>
<td>51</td>
</tr>
<tr>
<td>Small grocery store (n=241)</td>
<td>18</td>
<td>40</td>
<td></td>
<td>42</td>
</tr>
<tr>
<td>D2C - DIRECT TO CONSUMER</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Farmers' market (n=673)</td>
<td>19</td>
<td>41</td>
<td></td>
<td>37</td>
</tr>
<tr>
<td>Directly from a farm or ranch (n=176)</td>
<td>17</td>
<td>38</td>
<td></td>
<td>45</td>
</tr>
<tr>
<td>Online-only supplier (n=39)^</td>
<td>17</td>
<td>42</td>
<td></td>
<td>42</td>
</tr>
<tr>
<td>CSA or farm box program (n=44)^</td>
<td>19</td>
<td>44</td>
<td></td>
<td>49</td>
</tr>
<tr>
<td>Buying club (n=26)^</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note extremely small bases.

Chart 13: What is the highest certificate, diploma or degree that you have completed to date?  
(Base: Total purchasing local food from each channel)

<table>
<thead>
<tr>
<th>Category</th>
<th>Total respondents (n=950)</th>
<th>D2M - DIRECT TO MAINSTREAM</th>
<th>D2I - DIRECT TO INTERMEDIATED</th>
<th>D2C - DIRECT TO CONSUMER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total respondents (n=950)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2M - DIRECT TO MAINSTREAM</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Drugstore (n=210)</td>
<td>19</td>
<td>38</td>
<td></td>
<td>43</td>
</tr>
<tr>
<td>Supermarket (n=881)</td>
<td>17</td>
<td>42</td>
<td></td>
<td>41</td>
</tr>
<tr>
<td>Convenience store (n=181)</td>
<td>19</td>
<td>36</td>
<td></td>
<td>44</td>
</tr>
<tr>
<td>Club store (n=579)</td>
<td>18</td>
<td>44</td>
<td></td>
<td>39</td>
</tr>
<tr>
<td>Mass merchandiser (n=507)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2I - DIRECT TO INTERMEDIATED</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant or other eating establishment (n=658)</td>
<td>17</td>
<td>38</td>
<td></td>
<td>45</td>
</tr>
<tr>
<td>Health food, organic or natural food store (n=373)</td>
<td>16</td>
<td>36</td>
<td></td>
<td>48</td>
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<tr>
<td>Ethnic grocery store (n=242)</td>
<td>13</td>
<td>33</td>
<td></td>
<td>54</td>
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<tr>
<td>Specialty store (n=378)</td>
<td>14</td>
<td>35</td>
<td></td>
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<tr>
<td>Small grocery store (n=241)</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D2C - DIRECT TO CONSUMER</td>
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<td></td>
<td></td>
<td></td>
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<td>Directly from a farm or ranch (n=176)</td>
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<tr>
<td>Online-only supplier (n=39)^</td>
<td>21</td>
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<td></td>
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<tr>
<td>CSA or farm box program (n=44)^</td>
<td>16</td>
<td>35</td>
<td></td>
<td>49</td>
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<tr>
<td>Buying club (n=26)^</td>
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<td></td>
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*Note extremely small bases.
Chart 14: Was your total household income, before taxes and other deductions, under or over $... in 2014?
(Base: Total purchasing local food from each channel)

<table>
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<tr>
<th>Category</th>
<th>Percent of respondents</th>
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<td>D2C - DIRECT TO CONSUMER</td>
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<td>Farmers’ market (n=673)</td>
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<td>Online-only supplier (n=39)^</td>
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<td>CSA or farm box program (n=44)^</td>
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<td>19</td>
<td>39</td>
<td>26</td>
<td>23</td>
<td>17</td>
<td>2</td>
</tr>
</tbody>
</table>

*Note extremely small bases.
Appendix III:
Restaurants and other food services data
Discussion of error potential in restaurants and other food services expenditures

Respondents were initially screened in the same way as other market channels for having eaten local food at a restaurant or other food service establishment in the 12 month period May 2014 to April 2015. Of the n=932 respondents aware of the channel, 658 were classified as having eaten local food there, with half saying “yes” they had and half responding “assume yes.”

629 respondents from this group were selected to answer questions about their restaurant expenditures.

The restaurant section was unique in that questions about visit frequency and expenditures were phrased to gather information “specifically because it [the restaurant or other food service establishment] served food prepared from local ingredients” and not for spending on local food from the channel as this would be impossible for respondents to estimate.

If they had not chosen a restaurant specifically for this reason, a response of zero visits would have been appropriate, or an explanation could have been written in. Unfortunately, two programming errors occurred. Firstly, the response options were confined to numbers, so no written answers could be typed in. Secondly, and more importantly, the permissible range of responses to the question on number of visits was set at no less than one.

A dozen respondents noted the inappropriate restriction in their general comments about the survey. However, most did not. As a result, all selected respondents, other than those who had noted the issue, were recontacted and asked “In the 12 months from May 2014 to April 2015, did you and members of your household eat at a restaurant or other type of eating establishment specifically because it served food prepared from local ingredients?”

Responses were received from n=284 in all, for a 45% response rate. Unfortunately the timing of the recontact at the end of the school year and over Canada Day was not optimal. The sample was weighted by age within gender to represent the full group selected to respond on expenditures in order to correct for demographic differences in the smaller recontact group.

It was assumed that the recontact sample would contain an overrepresentation of respondents who made restaurant choices based on the use of local ingredients, simply because they would be more engaged with the topic. Among the 284 rebalanced recontact respondents, 42% were certain they had purchased local food at a restaurant and 58% assumed so. Compared to the

---

5. Due to concern about the length of the questionnaire, no filter question was asked to determine whether this had or had not occurred.

6. Based on the Alternative Markets 2012 survey where a similar line of questioning was pursued, it was expected that approximately 27% would qualify, unless a change in incidence had occurred since then.
50:50 split in the base sample, the result did not support the assumption. Thus it was with some surprise that the incidence of deliberate choice of restaurants for local food was found to be 44% (n=126), far higher than anticipated.

The incidence figure was crucial for estimating the total value of the market. A further option could have been to assume everyone who did deliberately select restaurants for local food had responded, for a 20% incidence rate, but this was unlikely to have happened based on the discrepancy in certainty about having eaten local food at a restaurant.

It was therefore decided to project and report expenditures by the incidence obtained in the recontact results.
Appendix IV: Online survey questions
INTRODUCTION TO MEET FOIP REQUIREMENTS

Information in this survey is collected only for the purpose of research.

Infact Research and Consulting Inc. are conducting market research on behalf of Alberta Agriculture and Rural Development to explore resident attitudes to and demand for food in the Calgary Region.

Collection is authorized under section 33(c) of the Freedom of Information and Protection of Privacy (FOIP) Act.

Your name and contact information will not be requested in the survey. Questions about the purpose of collection of other personal information (including its collection, use, disclosure and the purpose of collection) may be directed to:

Mimi Lee, Economist, Agriculture and Rural Development.
Provincial Building, #230, 4709 - 44 Avenue, Stony Plain, AB T7Z 1N4
Phone: (780) 968-3552  Mimi.Lee@gov.ab.ca

For all other questions about the survey, please contact:

Sid Nieuwenhuis, Infact Research and Consulting Inc.
snieuwenhuis@infactresearch.com

RESPONDENT SCREENING AND MARKET PROFILES (PART 1)

To start, we’d like to ask you some basic questions to ensure that we obtain a representative sample of households in Calgary.

1. Do you or any members of your immediate family work for any of the following types of organizations:

   A market research firm          SCREEN OUT
   A newspaper, radio or TV station SCREEN OUT
   An advertising agency          SCREEN OUT
   None of these

2. 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?

   Yes                              SCREEN OUT
   No
3. Are you responsible for shopping for food FOR YOUR HOUSEHOLD? That would include choosing food and being able to report estimated expenditures on food for your household.

   Yes, fully responsible
   Yes, have major responsibility
   No SCREEN OUT

4. Are you:

   Male
   Female

5. Which of the following age groups are you in?

   17 years and under SCREEN OUT
   18-34
   35-44
   45-54
   55-64
   65 or older

6. What are the first three digits of your postal code?

   • • • SCREEN OUT IF NOT ON LIST OF QUALIFYING FSAs.

ASK IF Q6=T1X, T3E OR T3Z.

6A. Do you live:

   Within the boundaries of the City of Calgary 1
   Outside the City boundaries 2

ASK IF Q6=T0L, T0M OR T0J.

7. What are the last three digits of your postal code?

   • • • • • SCREEN OUT IF NOT ON LIST OF QUALIFYING POSTAL CODES.

8. Was anyone in your household born and raised outside Canada?

   Yes
   No
9. Have you heard of each of the following types of food suppliers or food outlets in the Calgary region?
Select “Yes” or “No” for each item.

1. **DRUG STORE** (like London Drugs, Shoppers Drug Mart or Rexall Drugs)
2. **CONVENIENCE STORE** (for example, Mac’s, 7-Eleven, Winks, Reddi Mart, Esso On the Run, Petro Canada Supper Stop, Tags Food & Gas, Husky, Mohawk, Shell, Parkland Fas Gas and Turbo)
3. **CLUB STORE** (for example, Costco, Real Canadian Wholesale Club, or The Grocery People Warehouse Market)
4. **ETHNIC GROCERY STORE** (like T&T Supermarket or another Asian store, European, Middle Eastern, Latin, Indian or other ethnic stores)
5. **SMALL GROCERY STORE** (like Extra Foods, Bigway Foods or AG Foods)
6. **SUPERMARKET** (for example, Co-Op, Superstore, Safeway, Sobeys, Save-On-Foods, IGA, No Frills or a REGULAR Walmart store)
7. **MASS MERCHANDISER** (for example, a Walmart SUPERCENTER)
8. **HEALTH FOOD, NATURAL OR ORGANIC FOOD STORE OR MARKET** (like Planet Organic, Amaranth Whole Foods, Blush Lane, Community Natural Foods, Homegrown Foods, Mrs Green’s or Sunnyside Natural Markets)
9. **SPECIALTY STORE** (a butcher like Second to None Meats, a bakery like Sidewalk Citizen Bakery, a deli like Sunterra Market, The Cookbook Company Cooks, or Bite Groceteria, a fish or seafood store like Blu Seafood Market or an in-town produce store such as Market Produce)
10. **ONLINE-ONLY SUPPLIER** (from an online-only company that represents a group of farms or combines products from many suppliers (like SPUD, Green Earth Organics or Yuba). They will take your order on the Internet and deliver to you at home or to a convenient central location for pick-up) IF YES: Please specify name ______________
11. **BUYING CLUB** (a group of people who get together to buy in bulk at a lower cost and then share out the purchases made)
12. **CSA OR FARM BOX PROGRAM** (CSA means Community Supported Agriculture or Community Shared Agriculture. In both CSAs and Farm Box Programs, households purchase a subscription ahead of time from a farm or group of farms to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products each week throughout the season)
13. **FARMERS’ MARKET** (a place or space with stalls or tables, which is open on a regular scheduled basis, where one can buy food like fresh fruits and vegetables, herbs, honey, meat and other farm products, including processed food like jams, pies and sausages)
14. **DIRECTLY FROM A FARM OR RANCH** (you buy food at a farm or ranch gate, a farm or ranch store, a roadside stand, stall or truck, a U-Pick farm or a Hutterite colony. Food could include fresh fruits and vegetables, herbs, honey, meat and other farm products, including processed food like wine, honey, jams, pies and sausages)
15. **RESTAURANT OR OTHER EATING ESTABLISHMENT** (restaurant, hotel restaurant, diner, grill, pub, bistro, café, tea house, food truck or other eating establishment)

SCREEN OUT IF ‘NO’ TO ALL RESPONSES
10. How much do you know about each of the following types of food suppliers or food outlets in the Calgary region?
Click on the answer that best describes your knowledge of each one.

Know a lot
Know something
Know a little
Know nothing, have only heard of them

GROWTH POTENTIAL FOR D2C AND D2I OUTLETS (PART 1)

11. Now that you've read about the following types of food suppliers or outlets, are you interested in actively seeking them out?
Select “Yes” or “No” for each item.

OUTLET USAGE

12. In the past 12 months, did you or members of your household buy Local Food, that is, food grown or made in Alberta, at these suppliers or outlets?

Yes
Assume yes
No
Just don't know

GROWTH POTENTIAL FOR D2C AND D2I OUTLETS (PART 2)

13. In the next 12 months, how much Local Food (food grown or made in Alberta) do you expect that you will buy from these suppliers or outlets?
Click on the answer that best describes your expectations.

More
Same amount
Less

14. In the next 12 months, do you intend to buy Local Food (food grown or made in Alberta) at any of these suppliers or outlets?
Select “Yes” or “No” for each item.

Yes
No
Not sure/don't know
TYPES OF LOCAL FOOD PURCHASED AND OF INTEREST TO PURCHASERS OF LOCAL FOOD

ASK IF ANY Q12='YES' OR 'ASSUME YES'.
15. What Local Food* products or items did you buy most often in the past 12 months, that is, between May 2014 and April 2015?
Please write in the items, one type of product or item per box
*Hover over the asterisk to see the definition of Local Food again.
[*LOCAL FOOD=Food made or grown in Alberta]

ASK IF ANY Q12='YES' OR 'ASSUME YES', OR ANY Q14=YES.
16. What particular products or items would you like to see, or see more of, that are grown or made in Alberta? Please do NOT answer with a ‘yes’ or ‘no’.
Please be as specific as possible with your suggestions.

RANDOMIZE ORDER OF PRESENTATION 1-12.
1. Fresh, frozen, canned or dried fruits or vegetables (please specify type of fruit or vegetable)
2. Products made of fruits or vegetables (including juices, jams, jellies, syrups, pickles, relish, chutneys, salsas, antipastos, etc.)
3. Condiments and spreads (including ketchup, mustard, salad dressings, margarine, flavoured oils and vinegars, marinades, etc.)
4. Grains (including rolled oats, flax, flour, etc.)
5. Products made of grains (including pancake mix, muffin mix, breakfast cereal, granola, etc.)
6. Fresh or dried herbs and spices
7. Meats (including beef, lamb, bison, elk, etc.)
8. Meat products (including sausages, cured/smoked meat, meat pies, etc.)
9. Poultry (including chicken, turkey, quail, etc.)
10. Poultry products (including eggs, poultry sausage, cured poultry, pot pies, etc.)
11. Dairy and dairy products (including milk, butter, cheese, yogurt, flavoured and fermented products, etc.)
12. Honey
13. Other products or items (please specify) _____
☐ Don’t know
☐ None

DESIRABLE PRODUCTION ATTRIBUTES

IF ANY Q12='YES' OR 'ASSUME YES', OR ANY Q14=YES, ASK:
17. Please click on 5 of the words or phrases below that best describe the food attributes that you would like to see in Local Food*.
If you change your mind, click again to unselect the item and then choose another one.

RANDOMIZE ORDER OF PRESENTATION 1-18.
1. Government regulated/tested
2. Can trust the food
3. Certified Organic
4. Follow organic practices (not certified)
5. Use natural farming practices
6. No chemicals
7. Humanely raised animals
8. No preservatives/additives/fillers
9. Simple
10. Authentic
11. Less/minimally processed
12. Vine/tree/field ripened
13. Farm practices protect the air, water, soil
14. High quality ingredients
15. Less packaging
16. Complete list of ingredients
17. Know where grown/raised
18. Transparency of farming/production practices
19. Other attributes (please specify) ______________
   □ Don’t know
   □ None of the above

ADDITIONAL MOTIVATORS FOR PURCHASING LOCAL FOOD

IF ANY Q12=’YES’ OR ‘ASSUME YES’, OR ANY Q14=YES, ASK:
Q17A. Among the following, what are your top 3 reasons for purchasing Local Food*?
Please assign a rating of 1, 2 and 3 to your top three reasons only.

RANDOMIZE ORDER OF PRESENTATION 1-16.

1. Fresher
2. Tastes better
3. Better appearance
4. Healthier for you
5. Better nutritional value
6. Different, specialty or ethnic food
7. Easy to order
8. Enjoy the shopping atmosphere/experience
9. Have confidence in the Local Food system
10. Have a good relationship with the producers
11. Know the story behind the food
12. Not as expensive as organic
13. Not coming from far
14. Supports Alberta’s economy
15. Supports Alberta’s small/family farms
16. Supports small independent businesses
17. Other (please specify) ______________
   □ Don’t know
   □ None
BARRIERS TO PURCHASING LOCAL FOOD

ASK IF ANY Q12=’YES’ OR ‘ASSUME YES’, OR ANY Q14=’YES’.
18. What are your top 3 barriers or concerns that makes it difficult or inhibits you from purchasing Local Food*

Please assign a rating of 1, 2 and 3 to your top three reasons only.

RANDOMIZE ORDER OF PRESENTATION 1-14.

1. Don’t think about it
2. Lack of promotion of why to buy
3. Need information on how, when and where to buy
4. Misleading marketing
5. Don’t trust it
6. Need labelling/ signage to show it is local
7. Limited or inconvenient hours
8. Too far for you to travel/time to get there
9. Extra food preparation time
10. Cost of your transportation
11. Affordability/cost of Local Food
12. Limited variety/selection
13. Only seasonal availability
14. Quality doesn’t meet expectations
15. Other (please specify) _______________
   □ Don’t know
   □ None of the above

AWARENESS OF ALBERTA FOOD AND AGRICULTURE ISSUES

ASK ALL:
19. To what extent do you agree or disagree with the following statements about Local Food**?

Click on the answer that best describes how you feel for each phrase

RANDOMIZE ORDER OF PRESENTATION.

1. It costs more for the farm to follow organic practices
2. The consumer should be prepared to pay more for local food
3. Alberta can grow much more variety – there is no reason it should come from other countries
4. Alberta farmers don’t know what consumers want
5. Alberta farmers should grow something new or different
6. I’ll try new or unusual local foods if they come with recipes
7. Individual farms or small groups of Alberta farms should promote directly to the consumer
8. I am knowledgeable about Alberta farming practices
9. I want to know more about Alberta farming, agriculture and local food
10. When I have a choice, I tend to buy cheaper food items

   Strongly agree
   Somewhat agree
   Neither agree nor disagree
   Somewhat disagree
   Strongly disagree
   Don’t know
MARKET VALUE ESTIMATION

SELECT UP TO FOUR (4) D2C AND/OR D2I OUTLETS WHERE Q12=‘YES’ OR ‘ASSUME YES’, IN THE FOLLOWING ORDER:

1. a CSA/Farm Box Program
2. a Health, Natural or Organic Food Store D2I
3. a Specialty Food Store D2I
4. an Online-Only Supplier D2C
5. a Buying Club D2C
6. a Farm or Ranch D2C
7. a Restaurant or Other Eating Establishment
8. a Small Grocery Store D2I
9. an Ethnic Grocery Store D2I
10. a Farmers’ Market D2C

FOR EACH D2C OUTLET SELECTED
ASK Q20-Q24:
20. In the past 12 months did you purchase Local Food* from … [INSERT WORDING FROM D2C LIST ABOVE]** in:
Select “Yes” or “No” for each period.
[**SHOW FULL DESCRIPTION OF THE OUTLET USED IN Q9 WHEN MOUSE HOVERS OVER PHRASE.]

Summer, May to October 2014
Winter, November 2014 to April 2015

ASK IF SUMMER=YES IN Q20.
21. In summer 2014 (May-October), how many times did you and members of your household purchase Local Food* from …** in Alberta?
If you don’t know exactly, please provide your best estimate.

Number of times in summer 2014 ______

ASK IF SUMMER=YES IN Q20:
22. On average, how much did you and members of your household spend per visit on Local Food* from …** in summer 2014 (May-October)? Please exclude food from British Columbia or elsewhere.
If you don’t know exactly, please provide your best estimate.

Average per visit spending
Up to $10
$11-$20
$21-$30
$31-$40
$41-$50
$51-$60
$61-$70
$71-$80
$81-$90
$91-$100
$101 and over (please specify amount) ______
ASK IF WINTER=YES IN Q20:
23. In winter 2014/15 (November-April), how many times did you and members of your household purchase Local Food* from ...** in Alberta?
If you don’t know exactly, please provide your best estimate.

Number of times in winter 2014/15 _____

ASK IF WINTER=YES IN Q20:
24. On average, how much did you and members of your household spend per visit on Local Food* from ...** in winter 2014/15 (November-April)? Please exclude food from British Columbia or elsewhere.
If you don’t know exactly, please provide your best estimate.

Average per visit spending
Up to $10
$11-$20
$21-$30
$31-$40
$41-$50
$51-$60
$61-$70
$71-$80
$81-$90
$91-$100
$101 and over (please specify amount) _______

FOR EACH D2I OUTLET SELECTED
ASK Q25-Q33
25. In the past 12 months did you purchase Local Food* from ...** in:
Select “Yes” or “No” for each period.

Q2 2014, April to June
Q3 2014, July to September
Q4 2014, October to December
Q1 2015, January to March

ASK IF Q2/2014=YES IN Q25:
26. In Q2 2014 (April-June), how many times did you and members of your household purchase Local Food* from ...** in Alberta?
If you don’t know exactly, please provide your best estimate.

Number of times in Q2 2014 (April-June) _____

ASK IF Q2/2014=YES IN Q25:
27. On average, how much did you and members of your household spend per visit on Local Food* from ...** in Q2 2014 (April-June)? Please exclude food from British Columbia or elsewhere.
If you don’t know exactly, please provide your best estimate.

Average per visit spending
Up to $10
$11-$20
$21-$30
$31-$40
$41-$50
$51-$60
$61-$70
$71-$80
$81-$90
$91-$100
$101 and over (please specify amount) _______

REPEAT Q26-Q27 AS:
Q28-Q29 FOR Q3 2014 (July-September)
Q30-Q31 FOR Q4 2014 (October-December)
Q32-Q33 FOR Q1 2015 (January-March)

FOR CSA/FARM BOX PROGRAM
ASK Q34
34. In the past 12 months, from May 2014 to April 2015, how much did you spend on Local Food delivered by a CSA or Farm Box Program** in Alberta? Please exclude food from British Columbia or elsewhere.
If you don’t know exactly, please provide your best estimate.

Total spent on Local Food in last 12 months $____

FOR RESTAURANTS OR OTHER EATING ESTABLISHMENTS
ASK Q35-Q36
35. In the past 12 months, from May 2014 to April 2015, how many times did you and members of your household eat at a restaurant or other type of eating establishment** specifically because it served food prepared from local* ingredients?
If you don’t know exactly, please provide your best estimate.

# Times in last 12 months ____

36. On average, how much did you and members of your household spend per visit at a restaurant or other type of eating establishment** chosen specifically because it served food prepared from local* ingredients?
If you don’t know exactly, please provide your best estimate.

Average per visit spending
Up to $10
$11-$20
$21-$30
$31-$40
$41-$50
$51-$75
$76-$100
$101-$150
$151-$200
$201-$250
$251 and over (please specify amount) ______________
MARKET PROFILES (PART 2)

The final questions about you and your household will be used for statistical classification purposes only. Only aggregated responses will be used and published on the Agriculture and Rural Development website.

37. Do you, or does any member of your household grow food (fruits, vegetables, herbs or something else) for your own consumption?
   Check all that apply.
   
   Yes, at home
   Yes, in a community garden
   Yes, somewhere else (please specify) ___
   No

38. How many people, including yourself and any babies, live in your household?
   
   Number in household ___
   
   ASK IF Q38>1.

39. How old is the youngest child living in your household?
   
   Up to 5 years
   6 to 12 years
   13 to 17 years
   18 or older
   No children in household

40. Which of the following best describes your marital status?
   
   Single, that is, never married
   Married or living together as a couple
   Widowed
   Separated
   Divorced

41. What is the highest certificate, diploma or degree you have COMPLETED to date?
   
   No certificate, diploma or degree
   High school diploma or equivalent
   College, CEGEP or other non-university certificate or diploma
   Apprenticeship or trades certificate or diploma
   University certificate or diploma below bachelor level
   University certificate, diploma or degree at bachelor level or above
   
   ASK IF Q7=CALGARY REGION.

42. Do you live on a farm or ranch?
   
   Yes
   No
43. Where were you born?
   
   In the Calgary Region**
   Elsewhere in Alberta
   Another Canadian province
   Outside Canada

   [**Calgary Region=City of Calgary, Rocky View County, Mountain View County, the District of Foothills, including Airdrie, Cochrane, Okotoks, High River, Olds and other towns and villages in the district.]

   ASK IF Q43=’IN THE CALGARY REGION’.

44. Do you consider Calgary/the Calgary Region to be “home”?
   
   Yes
   Not quite yet
   No

45. a. Was your TOTAL household income, before taxes and other deductions, under or over $100,000 in 2014?
   
   Under $100,000
   $100,000 or more

   ASK IF Q45a=UNDER $100,000.

   b. Was it under or over $60,000?
   
   Under $60,000
   $60,000 or more

   ASK IF Q45a=$100,000 OR MORE.

   c. Was it under or over $140,000?
   
   Under $140,000
   $140,000 or more

   Q45 NOT MANDATORY

46. Do you have any further comments on Local Food* in the Calgary Region? Anything you didn’t have the opportunity to address in the previous questions?

THANK YOU

On behalf of Infact Research, the Government of Alberta and Alberta farmers, producers and distributors, thank you for taking the time to answer these questions to improve their products and services to you.
Appendix V:
Focus group materials
Moderator’s guide: Local Food

I. Introductions

MODERATOR:

Welcome

Housekeeping (introduce self and co-facilitator, describe focus group room and viewers, time, refreshments, breaks, washroom location, mobile devices, recording and speaking)

POST LIST 1 (name – occupation – time lived in the Calgary region/where came from – your household – things you enjoy spending time doing – mass and social media use)

1. Round table introductions referring to list

MODERATOR:

Describe process for evening (Q&A/discussion, not round the table – frank opinions needed – personal reactions, not agreement – no right or wrong answers – you can’t offend me)

II. Food trends; ag issues; where Local Food lives in people’s minds

2. Describe something that you feel strongly about relating to food - why

POST LIST 2 (Q3)

3. What feelings do you have about …

PROBE: - particular foods
    - how food is grown or made
    - where food comes from
    - where food is sold

4. What are you doing more of in relation to food – what less

5. What changes would you like to see relating to food
III. Understanding Local Food channels

6. BRIEFLY: What does the term 'Local Food' mean to you?

POST DEFINITION (LOCAL FOOD = Food grown or made in Alberta) AND LEAVE UP FOR REST OF DISCUSSION

Explain that this term and this definition will be used for the rest of the discussion. Allow any burning comments

HAND OUT RECORDING SHEET 1 – Explain that we will first answer some questions individually about types of outlets, then talk about them together.

Record group/age/gender

7. Types of outlets used to purchase Local Food
   a. At what types of outlets do you buy Local Food most often for your household RECORD MOST OFTEN
   b. Where do you spend most on Local Food RECORD SPEND MOST
   c. At what other types of outlets do you buy Local Food RECORD OTHER BUY

DISCUSS Reasons for choice of suppliers and differences in which list they are in

PROBE: - Was it easy enough to read and understand the definitions of each type of supplier
   - Was it necessary to include definitions at all – for some of the supplier types/ which ones
   - What types of suppliers did you not know about before – did the descriptions arouse your interest – why/not
FOR DIRECT TO CONSUMER AND DIRECT TO INTERMEDIATED CHANNELS NOT MENTIONED ASK:
8. Does anyone buy Local Food from … (channel) [deliberately choose to eat at a restaurant or other type of eating establishment in Alberta specifically because it serves food prepared from local ingredients] – why are you not buying Local Food there

9. Specific questions regarding online orders
   a. When you order online, do you use a mobile device or a computer – what would make ordering easier (PROBE: store specific or general app)
   b. How do you receive the food you ordered online

POST LISTS OF DIRECT TO CONSUMER AND DIRECT TO INTERMEDIATED CHANNELS WITHOUT HEADERS (see back of Guide for list and definitions)
10. Awareness and importance of knowing seller/supplier
    PROBE FOR DIRECT TO CONSUMER SOURCES:
        - When purchasing at … (channels) do you know if you are buying from one or two farms or producers selling food they themselves grew or made, or from an aggregator or food hub, that is, an organization or company that assembles items from several different farms or producers
        - How easy is it to tell – how important is this
        - How familiar are you with the term “aggregator” – and “food hub” – is there another term you use for this type of seller (e.g., online grocery stores/markets)

ASK FOR EACH LIST
11. How do you know that you are buying Local Food at … (channels) – what is special, or helpful, about buying Local Food at … (channels) – and what is a challenge about buying Local Food there
IV. Motivators and barriers to purchase of Local Food; ag issues

ADD DIRECT TO MAINSTREAM CHANNEL LIST
POST HEADERS TO CHANNEL LISTS

READ: In the industry, these outlets are grouped as being direct to the consumer, like a farmer selling online or at a farmers’ market, or direct to an intermediated organization, when the farmer or producer sells to a restaurant or small grocery store and you then buy from the restaurant or store, or direct to mainstream, where farms sell to wholesalers or large retailers like supermarkets or drugstores that sell food.

12. Have you changed the amount of shopping you do in direct to consumer and direct to intermediated outlets over the last 2 years – and the amount of spending – why/not

PROBE:
Has anything relating to shopping at direct to mainstream outlets affected your shopping at direct to consumer or direct to intermediated outlets

13. In general, are you interested in buying more Local Food – why/not
a. Why do you choose to buy Local Food or why would you like to buy more Local Food

PROBE: - Characteristics of the food itself (freshness, quality, taste, appearance)
- Economic benefits (community/region, Alberta)
- Environmental impact
- Food safety
- Health benefits (including nutrition)
- Knowing the source of the food
- Production practices (how raised/grown)
- Support for Alberta/local farmers/family farms
b. What is holding you back from buying more Local Food – what changes would help you buy more Local Food in these two groups (direct to consumer, direct to intermediated) of outlets or any one individually

PROBE:
- Known barriers:
  - Information deficits (why, where, when buy, labelling)
  - Accessibility (distance, transportation cost)
  - Affordability (cost)
  - Availability (product type/variety, seasonality)

- Are there any particular kinds of foods that you feel are not in sufficient supply from local growers and producers? Please consider all kinds of food – produce, dairy, meat, poultry, fish, baked goods or processed food as well as different growing and production methods

c. What do you think are the current issues facing Alberta’s farmers and producers with regard to the production and sale of food in Alberta

PROBE:
- What do Alberta farmers and producers need to know about you, to help satisfy your needs for their products
- What else do Alberta farmers and producers need to know to increase their sales to you
V. Branding and promotion of Local Food

14. Have you seen or heard … in the Calgary region
   a. any slogans, themes or catchy phrases promoting Local Food
   b. any icons or logos promoting Local Food
   c. any advertising or promotion for Local Food

PROBE IF YES: - Describe what was seen or heard
   - What organization was doing this promotion

POST LOGOS INDIVIDUALLY

15. Have you seen this – where – which organization/s use this - how effective do you think this is in persuading you to purchase locally grown or made food – why

Fresh Food. From real farmers.
VI. Test approaches to measuring expenditures

MODERATOR:
Explanation that will now be reviewing several ways of approaching part of a survey about Local Food. Will first answer questions individually, then talk about the themes together. Warn to read carefully as questions will sound repetitive, but they are all different. There are no right or wrong answers. Please take this seriously and don’t try to make your answers consistent, just answer each question as best possible. Absolutely no talking, exclamations, eye rolling or other communication at all!

HAND OUT PACKAGE OF RANDOMLY MIXED RECORDING SHEETS (EXCEPT Q29-Q34 LAST)
Choose the sales outlet in the direct-to-consumer list where you are most likely to buy Local Food and write that down at the top of the direct-to-consumer column (exclude CSA). Then do the same for one outlet in the direct-to-intermediated list (exclude restaurant). If you only buy Local Food at suppliers under one heading, choose two from that list.

Keep the pages in the order handed out until you are done.

DISCUSSION
35. Overall, which was easiest for you to answer about Local Food spending – total spending per year, last purchase, usual spending or average spending per purchase/visit/trip – why – which is the most accurate number – why (Q17/18, 31/32, 26/27/28)

36. Which was easier to answer, how much you spend, or to choose how much you spend from a range of expenditure categories – why – for what period would a range estimate be more accurate (per purchasing trip, per year, for a shorter period than a year) (Q26/27, 29/30)

37. How can you estimate what you spend on Local Food most accurately – as a proportion of total spending (amount, percentage, multiple) or you do know the amount without having to refer to the total that you spent – why this one (Q19/20)

38. How confident did you feel giving estimates of spending covering 12 months – would several shorter periods be more accurate – would it make it easier to answer spending for several shorter periods – why/not – what periods did you come up with (Q21/22, 33/34)

39. How confident did you feel giving estimates of purchasing frequency covering 12 months – would several shorter periods be more accurate – would it make it easier to answer purchasing frequency for several shorter periods – why/not – what periods did you come up with (Q23/24/25)
VII. Conclusion

40. Were you able to remember the definition of Local Food we used or did you have to read it again periodically during the discussion – if you were filling in a survey, would you need to be reminded of the definition

41. Is there anything you would like to add that we haven’t already addressed about Local Food?

Thank You – Distribute and sign for incentives
Focus Group

☐ 5:30 pm
☐ 8:00 pm

Gender

☐ Male
☐ Female

Age group

☐ 18-34
☐ 35-44
☐ 45-54
☐ 55-64
☐ 65 and over

Is anyone in your household a first generation Canadian immigrant or Canadian resident?

☐ Yes
☐ No
<table>
<thead>
<tr>
<th><strong>Buy Local Food most often</strong></th>
<th><strong>Spend most on Local Food</strong></th>
<th><strong>Also buy Local Food at</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DRUG STORE</strong> (like London Drugs, Shoppers Drug Mart or Rexall Drugs)</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td><strong>CONVENIENCE STORE</strong> (for example, Mac's, 7-Eleven, Winks, Reddi Mart, Esso On the Run, Petro Canada Super Stop, Tags Food &amp; Gas, Husky, Mohawk, Shell, Parkland Fas Gas and Turbo)</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td><strong>CLUB STORE</strong> (for example, Costco, Real Canadian Wholesale Club, or The Grocery People Warehouse Market (TGP))</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td><strong>ETHNIC GROCERY STORE</strong> (like T&amp;T Supermarket or another Asian store, European, Middle Eastern, Latin, Indian or other ethnic stores)</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td><strong>SMALL GROCERY STORE</strong> (like Extra Foods, Bigway Foods or AG Foods)</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td><strong>SUPERMARKET</strong> (for example, Co-Op, Superstore, Safeway, Sobeys, Save-On-Foods, IGA, No Frills or a REGULAR Walmart store)</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td><strong>MASS MERCHANDISER</strong> (for example, a Walmart SUPERCENTER or Target store)</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td><strong>HEALTH FOOD, NATURAL OR ORGANIC FOOD STORE OR MARKET</strong> (like Planet Organic, Amaranth Whole Foods, Blush Lane, Community Natural Foods, Homegrown Foods, Mrs Green’s or Sunnyside Natural Markets)</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td><strong>SPECIALTY STORE</strong> (a butcher like Second to None Meats, a bakery like Sidewalk Citizen Bakery, a deli like Sunterra Market, The Cookbook Company Cooks, or Bite Groceteria, a fish or seafood store like Blu Seafood Market or an in-town produce store such as Market Produce)</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td><strong>ONLINE</strong> (from a farm, or from a company that represents a group of farms or combines products from many suppliers (like SPUD, Green Earth Organics or Yuba). They will take your order on the Internet and deliver to you at home or to a convenient central location for pick-up)</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td><strong>BUYING CLUB</strong> (a group of people who get together to buy in bulk at a lower cost and then share out the purchases made)</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td><strong>CSA OR BOX PROGRAM</strong> (CSA means Community Supported Agriculture or Community Shared Agriculture. In both CSAs and Box Programs, households purchase a subscription ahead of time from a farm or group of farms to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products each week throughout the season or year)</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td><strong>FARMERS’ MARKET</strong> (a place or space with stalls or tables, which is open on a regular scheduled basis, where one can buy food like fresh fruits and vegetables, herbs, honey, meat and other farm products, including processed food like jams, pies and sausages)</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td><strong>DIRECTLY FROM A FARM OR RANCH</strong> (you buy food at a farm or ranch gate, a farm or ranch store, a roadside stand, stall or truck, a U-Pick farm or a Hutterite colony. Food could include fresh fruits and vegetables, herbs, honey, meat and other farm products, including processed food like wine, honey, jams, pies and sausages)</td>
<td>14</td>
<td>14</td>
</tr>
<tr>
<td><strong>RESTAURANT</strong> (restaurant, hotel restaurant, diner, grill, pub, bistro, café, tea house, food truck or other eating establishment)</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td><strong>OTHER (please specify)</strong></td>
<td>16</td>
<td>16</td>
</tr>
</tbody>
</table>
Channel display lists and definitions

**DIRECT TO CONSUMER**
- Online
- A buying club
- A CSA or Box Program
- Farmers’ Markets
- Directly from a farm or ranch

a. Online (from a farm, or from a company that represents a group of farms or combines products from many suppliers (like SPUD, Green Earth Organics or Yuba). They will take your order on the Internet and deliver to you at home or to a convenient central location for pick-up)
b. A buying club (a group of people who get together to buy in bulk at a lower cost and then share out the purchases made)
c. A CSA or Box Program (CSA means Community Supported Agriculture or Community Shared Agriculture. In both CSAs and Box Programs, households purchase a subscription ahead of time directly from a farm or group of farms to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products each week throughout the season or year)
d. Farmers’ Markets (a place or space with stalls or tables, which is open on a regular scheduled basis, where one can buy food like fresh fruits and vegetables, herbs, honey, meat and other farm products, including processed food like jams, pies and sausages)
e. Directly from a farm or ranch (you buy food at a farm or ranch gate, a farm or ranch store, a roadside stand, stall or truck, a U-Pick farm or a Hutterite colony. Food could include fresh fruits and vegetables, herbs, honey, meat and other farm products, including processed food like wine, honey, jams, pies and sausages)

**DIRECT TO INTERMEDIATED**
- Restaurants
- Specialty food stores
- Ethnic grocery stores
- Small general grocery stores
- Health food, natural or organic food stores and markets

a. Restaurants (restaurant, hotel restaurant, diner, grill, pub, bistro, café, tea house, food truck or other eating establishment)
b. Specialty food stores (a butcher like Second to None Meats, a bakery like Sidewalk Citizen Bakery, a deli like Sunterra Market, The Cookbook Company Cooks, or Bite Groceteria, a fish or seafood store like Blu Seafood Market or an in-town produce store such as Market Produce)
c. Ethnic grocery stores (like T&T Supermarket or another Asian store, European, Middle Eastern, Latin, Indian or other ethnic stores)
d. Small general grocery stores (like Extra Foods, Bigway Foods or AG Foods)
e. Health food, natural or organic food stores and markets (like Planet Organic, Amaranth Whole Foods, Blush Lane, Community Natural Foods, Homegrown Foods, Mrs Green’s or Sunnyside Natural Markets)

**DIRECT TO MAINSTREAM**
- Drug store
- Convenience store
- Club store
- Supermarket
- Mass merchandiser

a. Drug store (like London Drugs, Shoppers Drug Mart or Rexall Drugs)
b. Convenience store (for example, Mac’s, 7-Eleven, Winks, Reddi Mart, Esso On the Run, Petro Canada Super Stop, Tags Food & Gas, Husky, Mohawk, Shell, Parkland Fas Gas and Turbo)
c. Club store (for example, Costco, Real Canadian Wholesale Club, or The Grocery People Warehouse Market (TGP))
d. Supermarket (for example, Co-op, Superstore, Safeway, Sobeys, Save-On-Foods, IGA, No Frills or a REGULAR Walmart store)
e. Mass merchandiser (for example, a Walmart SUPERCENTER or Target store)
<table>
<thead>
<tr>
<th>Question</th>
<th>Direct-to-consumer outlet:</th>
<th>Direct-to-intermediated outlet:</th>
</tr>
</thead>
<tbody>
<tr>
<td>17. How much did you spend in 2014 ON LOCAL FOOD at …?</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>18. How much did you spend IN TOTAL on food in 2014 at …?</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>19. ANSWER WITHOUT CALCULATING: What proportion of your total spending on food at … in 2014 was on Local Food?</td>
<td>Proportion:</td>
<td>Proportion:</td>
</tr>
<tr>
<td>20. Would it be easier for you to answer how much you spent in total in 2014 on food at … (Q18), and then what proportion of that was on Local Food (Q19), or to estimate how much you spent on Local Food (Q17)?</td>
<td>☐ Total + proportion is easier ☐ Same ☐ Estimate is easier</td>
<td>☐ Total + proportion is easier ☐ Same ☐ Estimate is easier</td>
</tr>
<tr>
<td>21. Would it be easier and more accurate for you to answer how much you spent on food or Local Food for each of several shorter periods or for 12 months?</td>
<td>☐ Shorter easier ☐ Same ☐ 12 months easier</td>
<td>☐ Shorter easier ☐ Same ☐ 12 months easier</td>
</tr>
<tr>
<td>22. What would these time periods be?</td>
<td>Preferred period/s:</td>
<td>Preferred period/s:</td>
</tr>
<tr>
<td>Question</td>
<td>Direct-to-consumer outlet:</td>
<td>Direct-to-intermediated outlet:</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>---------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>23. How many times did you purchase food at … in 2014?</td>
<td># times purchased food:</td>
<td># times purchased food:</td>
</tr>
<tr>
<td></td>
<td>□ Completely accurate</td>
<td>□ Completely accurate</td>
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<tr>
<td></td>
<td>□ Pretty accurate</td>
<td>□ Pretty accurate</td>
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<td></td>
<td>□ A reasonable estimate</td>
<td>□ A reasonable estimate</td>
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<td>□ A guesstimate</td>
<td>□ A guesstimate</td>
</tr>
<tr>
<td>24. Is it easier and more accurate for you to answer how often you</td>
<td>□ Shorter easier</td>
<td>□ Shorter periods more</td>
</tr>
<tr>
<td>purchased food at … for each of several shorter periods or for 12</td>
<td>□ Same</td>
<td>more accurate</td>
</tr>
<tr>
<td>months?</td>
<td>□ 12 months easier</td>
<td>□ Same</td>
</tr>
<tr>
<td></td>
<td>□ Shorter periods more</td>
<td>□ 12 months more</td>
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<td></td>
<td>more accurate</td>
<td>more accurate</td>
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<td>□ Same</td>
<td>□ 12 months more</td>
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<td>□ 12 months more</td>
<td>more accurate</td>
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<td>□ A guesstimate</td>
<td>□ A guesstimate</td>
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<tr>
<td>25. What would these time periods be?</td>
<td>Preferred period/s:</td>
<td>Preferred period/s:</td>
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<td></td>
<td>□ Shorter easier</td>
<td>□ Shorter periods more</td>
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<td>□ Same</td>
<td>more accurate</td>
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<td>□ 12 months easier</td>
<td>□ Same</td>
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<td>□ 12 months more</td>
<td>□ A guesstimate</td>
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<td></td>
<td>□ A guesstimate</td>
<td>□ A guesstimate</td>
</tr>
<tr>
<td>26. In 2014, ON AVERAGE, how much did you spend on Local Food each</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>time you purchased food at …?</td>
<td>□ Completely accurate</td>
<td>□ Completely accurate</td>
</tr>
<tr>
<td></td>
<td>□ Pretty accurate</td>
<td>□ Pretty accurate</td>
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<tr>
<td></td>
<td>□ A reasonable estimate</td>
<td>□ A reasonable estimate</td>
</tr>
<tr>
<td></td>
<td>□ A guesstimate</td>
<td>□ A guesstimate</td>
</tr>
<tr>
<td>27. In 2014, how much did you USUALLY spend on Local Food each time</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>you purchased food at …?</td>
<td>□ Completely accurate</td>
<td>□ Completely accurate</td>
</tr>
<tr>
<td></td>
<td>□ Pretty accurate</td>
<td>□ Pretty accurate</td>
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<td></td>
<td>□ A reasonable estimate</td>
<td>□ A reasonable estimate</td>
</tr>
<tr>
<td></td>
<td>□ A guesstimate</td>
<td>□ A guesstimate</td>
</tr>
<tr>
<td>28. Is it easier to give an answer for your average spending (Q26) or</td>
<td>□ Average is easier</td>
<td>□ Average is easier</td>
</tr>
<tr>
<td>for your usual spending (Q27) on Local Food?</td>
<td>□ Same</td>
<td>□ Same</td>
</tr>
<tr>
<td></td>
<td>□ Usual is easier</td>
<td>□ Usual is easier</td>
</tr>
<tr>
<td>Question</td>
<td>Direct-to-consumer outlet:</td>
<td>Direct-to-intermediated outlet:</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>-----------------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>29. In 2014, ON AVERAGE, how much did you spend on Local Food each time you purchased food at …?</td>
<td><img src="#" alt="Options" /></td>
<td><img src="#" alt="Options" /></td>
</tr>
<tr>
<td></td>
<td><img src="#" alt="Confidence Options" /></td>
<td><img src="#" alt="Confidence Options" /></td>
</tr>
<tr>
<td>30. Is it easier and more accurate to give an answer for your average spending using the categories (Q29) or to estimate your spending (Q26)?</td>
<td><img src="#" alt="Options" /></td>
<td><img src="#" alt="Options" /></td>
</tr>
<tr>
<td></td>
<td><img src="#" alt="Confidence Options" /></td>
<td><img src="#" alt="Confidence Options" /></td>
</tr>
<tr>
<td>31. How much did you spend on Local Food the LAST TIME you purchased food at … in 2014?</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td><img src="#" alt="Confidence Options" /></td>
<td><img src="#" alt="Confidence Options" /></td>
</tr>
<tr>
<td>32. Is it easier to give an answer for your spending last time (Q31) or for your average spending (Q26)?</td>
<td><img src="#" alt="Options" /></td>
<td><img src="#" alt="Options" /></td>
</tr>
<tr>
<td></td>
<td><img src="#" alt="Confidence Options" /></td>
<td><img src="#" alt="Confidence Options" /></td>
</tr>
<tr>
<td>33. Is it easier and more accurate for you to answer how much you spent last time at … for several shorter periods or for 12 months?</td>
<td><img src="#" alt="Options" /></td>
<td><img src="#" alt="Options" /></td>
</tr>
<tr>
<td></td>
<td><img src="#" alt="Confidence Options" /></td>
<td><img src="#" alt="Confidence Options" /></td>
</tr>
<tr>
<td>34. What would these time periods be?</td>
<td>Preferred period/s:</td>
<td>Preferred period/s:</td>
</tr>
</tbody>
</table>
Appendix VI:
Food trends for 2014
Literature review

A comprehensive review of literature relating to local food market channels in the Calgary Region formed part of this study. The review was to cover information relating to each of the study objectives, with the overarching purpose of providing information that producers would find useful, for example, to understand consumers, the market, the role played by different channels in supplying local food or to inform product/production decisions.

It became evident early on that there was little by way of peer-reviewed literature about local food that was specific to the Calgary Region, so a great deal of emphasis was placed on accessing articles, blogs, webinars, surveys and other informal mechanisms to understand what – aside from recipes – was being published about “local food in Calgary.” The information gaps are as telling as the information found.

The primary search tools were the Internet (general key-word searches and to review websites and publications of various government bodies, organizations and associations), the use of library databases such as EBSCO, PressReader and Zinio Magazines and through more targeted online sources like Google Scholar.

During the search, many publications, articles and surveys with relevance to local food market channels were identified that originated elsewhere, most notably to jurisdictions within the United States, but also to other Canadian provinces. With some exceptions, these do not form part of this review, but were used to inform development of the consumer survey to ensure completeness of information.

The Calgary-specific materials are reviewed below under three headings, two of which are intended to give an overview of the findings on each topic, rather than to analyse the contents of each document separately. On occasion, the Calgary materials were supplemented with more widely gathered findings.
FOOD TRENDS FOR 2014/15

The top food trends in Calgary, Canada and internationally were derived from articles, surveys and blogs on the subject. A few of these lists were based on rankings provided by chefs in Canada and the U.S.A. The broader scope in this section provides greater confidence in the findings since multiple Calgary-based articles were generated by only a few local food writers, while many trends appeared to originate from commonly consulted sources.

Several of the ten most frequent trends were not necessarily about the food itself, but also encompassed cultural values, demographic trends and technology developments that impact or influence foods selected by consumers.

1. Health and wellness. Nutritious foods rich in anti-oxidants and potassium and low in sodium, chosen to help address medical conditions, formed a leading trend. “Aging boomers” were identified as the source of the trend as they face health challenges like obesity, diabetes, high cholesterol and high blood pressure. They look toward functional foods like fish high in omega-3 fatty acids, green tea, dark green leafy vegetables, sweet potatoes, carrots, dark chocolate, flax seed, berries, whole grains/fibre, butter, zero trans-fats and probiotics, among others, to realize a healthier diet.

   Better For You (BFY) foods continue the health and wellness theme in the general population, with a focus on removing or reducing unwanted substances such as fats, sugars – preferring naturally occurring sugars (e.g., honey, maple syrup, agave) to added sugars or artificial sweeteners – salt, caffeine and carbohydrates. Just like aging boomers, they are looking to functional foods to meet needs beyond energy production. They seek clean, enriched, modified and specialized products.

2. Vegetables. A frequently reported trend was an anticipated change in the types of vegetables that would be popular. Cauliflower was most notable, also other cruciferous and brassica vegetables like brussel sprouts, kale (on its way out though) and cabbage. Root vegetables were noted too, especially turnips, parsnips and beets.

3. Small meals and snacks. Small plates, mini-meals, flexible portions, portable foods and non-traditional healthy snacks focused on different times of the day are growing in importance, as structured meals no longer meet today’s grazing lifestyle, especially among 18-44 year olds. Family-style sharing was part of the trend and “golden-agers” were a driver too.

4. Beverages. Chefs were particularly vocal about beverage infusions using savory fresh ingredients from the kitchen, especially herbs and spices. The category included handcrafted signature liquors, craft beer/micro-brews, house-made soft drinks and infused water jugs.

   A very particular infusion trend centered specifically on tea appeared to be more than a chef-focused trend. Tea is used as flavouring for cocktails, ice-cream, sorbet and desserts such as shortbread or cheesecake. Different types of specialty or iced teas were mentioned as trending: matcha green tea, fermented kombucha tea, Thai-style, southern-sweet or flavoured iced teas and premium loose tea.

   Other beverages seen to be increasing in popularity included coconut water, green vegetable drinks or smoothies, and fresh pressed fruit juices.
5. **Simplicity and transparency.** Natural foods and transparency in production and labelling converge in the next trend. This reflects a demand for simplicity and “back to basics,” or authenticity, in food. It includes minimal processing so that foods are free of chemicals and additives of any type and animals are humanely treated.

This trend will require not only a change in recipes, but in packaging/labelling and marketing. For example, clarity on the term “natural” is required for each product. Consumers will read labels to identify allergens and verify fortification and health claims. Labels should be simpler and presented more concisely. There must be complete transparency on quality and contents, which may be achieved by consumers connecting to producers to understand their philosophy and products. More apps to find out about what is being eaten are anticipated.

6. **Gluten free.** Gluten free was the main selection among specialty foods that were trending up in a category termed “DIY health” in one article and “allergy conscious” in another. Other items mentioned in this context were Halal and Kosher, vegan and paleo-diets.

7. **Technology.** Technology changes, especially the use of mobile devices, drive the next trend. Access to recipes has long been enabled on the Internet. There are blogs and social media discussions and promotions related to food and recipes. It was reported that more than half the content on Pinterest is food-related, with one-third of respondents to a survey reporting that they buy food or cooking items after seeing them on Pinterest.

Mobile device apps support the compilation of shopping lists and price comparisons, allow users to search for restaurants, make bookings, tell friends where they are eating, share pictures, track calories, identify ingredients and allergens and find out what’s in season. A couple of articles reflected on the implications of this trend. One suggested restaurants should create a stage for customer bragging rights, with plating and lighting assisting their uploads to social media. Another suggested producers and retailers should help foodie cooks with convenient recipe suggestions. In London, ON, The SmartAPPetite app enables users to find out what, when and where local food can be bought and offers reliable dietary information and nutritional recipes.

Online grocery shopping and grocery delivery (which could be through different companies) is tech-enabled and was expected to extend to Mom and Pop shops in one forecast and to reach same day delivery in some markets in another forecast.

Laser labelling for fresh produce – logos, provenance specifics or QR codes – has been developed in Spain and has the potential to eliminate “un-eco-friendly” stickers.

8. **New proteins.** A trend to using new sources of protein increased interest in less expensive cuts of high quality meats, generally in restaurants as part of the nose-to-tail movement. Foods mentioned included beef cheeks, brisket, pork shoulder, skirt steak, lambs tongue, chicken feet, pigs ears and charcuterie/house cured meats. Smoking and smoky flavours were particularly singled out as a preparation method (whether using a smoker, liquid smoke, canned smoked vegetables or smoked cheese).

Other novel sources of protein-rich foods on the rise were pea whey, algae and more “out there” foods like insects (e.g., energy protein bars made from crickets, fried insects), rattlesnake, live octopus and human placenta.
9. Local food. Local sourcing did not represent a cohesive or focused trend as it was mainly mentioned within other contexts. For example, it was one of a number of sustainable criteria listed in one article; part of a “micro-local, anti-chain ethos” which would benefit specialty restaurants and city-wide distributors in another; a facilitator through the “eat local movement” of eMicromarket online grocery deliveries; and was even reported as being seen by some as a marketing rather than a production attribute.

In 2014, among Canadian chefs, locally sourced food, sometimes combined with locally inspired dishes or locally grown produce, fell from its leading overall position as a currently hot trend in 2010, 2011, 2012 and 2013. Nevertheless it remained a top three trend among restaurants.

10. Ancient grains. Ancient grains, quinoa, buckwheat, rice and non-wheat noodles and pasta were variously identified as trending.

Less frequently noted food trends included the following:

- Fermented foods like yogurt, kefir, miso, sauerkraut and kimchi, also vinegars and pickles, as sour and tangy become the flavour of choice.

- Increased sustainability by growing food in window ledge herb gardens, rooftop chicken coops, one’s backyard, a community garden or buying at farmers’ markets.

- A demographic shift focusing on the rise of the millennials, aged 15-35, is being given credit for driving most upcoming trends. This is a tech savvy, socially engaged, well informed generation who are reported to be less brand loyal, want something different and want to know the story behind the food and connect with it. They include both reheaters (of previously cooked food) and some who cook from scratch. They are interested in socially responsible eating and are willing to support their local community. They want to use technology to address social issues, ag-environmental interface issues, treatment of farm labour and food waste.

- A different sort of demographic trend is acculturation, necessitated by the presence of an increasing number of immigrants to Canada. This is seen in the presence of more ethnic grocery stores, ethnic restaurants and more retail shelf space for ethnic food, all of which diffuse their ingredients, cooking methods, presentation styles and dishes into mainstream culture. At the same time, modification to traditional diets takes place, especially in the second generation.

Immigrant groups offer niche market opportunities for specialty foods, but this requires an understanding of their concentration from different points of origin and their distinctive demographic differences (e.g., multi-generational households, family size, food spending patterns).

- Old fashioned and comfort desserts.
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MEDIA COVERAGE OF THE CALGARY FOOD SCENE

A review of recent media coverage of food in the Calgary Region – particularly in newspapers, blogs and on Calgary business and association websites in late 2014 when the review was conducted – revealed a focus on restaurants, their chefs and other food services. Some stories covered the activities of associations and corporate activities. These stories demonstrate the type of exposure Calgarians have to local food – or to values relating to local food production, purchasing, preparation and consumption – through the media.

• Listings. Local producers, including growers, ranchers, processors and chefs, were featured and profiled on some association websites. These include 15 from Calgary & Area on the Alberta Culinary Tourism Alliance website and over 80 on Slow Food Calgary’s website (though many of the suppliers listed were from Central and Southern Alberta).

Retailers, farmers’ markets, CSAs and other local businesses were listed under the headings “Where to buy local food” and in the REAP1 business association’s “Be Local” directory in the Premiere issue of Be Local, published by the Calgary Herald in 2013. On their website (www.reapcalgary.com), 40 like-minded local food-related members are profiled, along with links to their websites.

Reservations or online orders for over 600 Calgary restaurants are facilitated by the website www.food-delivery.ca. A less elaborate site with similar branding, www.foodcalgary.ca, also offers online viewing and ordering of restaurant food for delivery. While the restaurants in both sites are classified by type of cuisine, local food is not identified as a feature.

• Food service outlets that pride themselves on the use of local ingredients and work to support the local community were often the subject of stories. A fairly recent addition to the food scene was Village Ice Cream, praised for product quality, the use of fresh local ingredients purchased from a farmers’ market and supplies sourced from local farms and neighbouring vendors. The pride taken by the owner in building community relationships was intentionally reflected in the name of the shop.

Coverage of a brand new aggregation service offered by Yuba Local Market, a marketing and grocery delivery company that promotes itself as a farm-to-desk service, focused on the products offered by the company’s partners in the venture. These included Alberta meat, poultry, dairy, produce and artisanal confectionary producers. Partners provide their products on consignment and Yuba markets and delivers to downtown Calgary. Orders are placed on their website, where information on the producers may also be found. Delivery is made for a nominal charge.

Six restaurants were featured in an article targeted to locavores who want to eat out: Black Betty Burger & Wine Bar, Blue Star Diner, 14th Street Bierhaus, Craft Beer Market and River Café. This short article hit many “local” touchpoints: freshness, flavour, use of basic ingredients, homegrown, food miles, local production or sourcing from well-known local producers like Sidewalk Citizen, organic, no hormones or steroids and mealshare offerings.

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1 Respect for the Earth and All People (REAP)
Beverages. Local coverage of new food services extended to beverages. Growth in craft beer dominated the discussion, offering consumers greater diversity, an opportunity to taste new things and to support the local community. Hotspots were identified, such as Wurst Restaurant and Beer Hall, National and Craft Beer Market, which offer a wide variety of opulent selections from around the world. Product offerings, the layout, décor and unique features were highlighted.

In addition, Craft Beer Market, headquartered in Calgary, made the news because of its expansion plans. The small restaurant chain, which serves pub food with a focus on local ingredients, responded to overtures for a joint venture and will be opening in China.

High-end restaurants and their chefs. Coverage in media outside Calgary tended to focus on high-end restaurants and their chefs, including Anju, Black Pig Bistro, Bocce, Charcut Roast House, Model Milk, NOtaBLE, Posto Pizzeria and Bar, River Café, Rouge, Shiki Menya, Test Kitchen, The Roasterie and UNA Pizza+Wine. Comments revealed surprise at Calgary’s growing sophistication and polish, including the type and quality of food prepared, compared to expectations of beef from a city long described as Cow Town. Charcut in particular appears to have gained national exposure. Its award-winning chef escorts visiting writers to the Calgary Farmers' Market to demonstrate and laud food sourced locally. She is also asked to comment on her favourite restaurants and food service establishments (e.g., Bite, Sidewalk Citizen, Raw Bar).

Food trucks. The new wave of popular, unique, quasi-gourmet food trucks was in the news and not in a good way. Headlines such as “This Bites! Calgary’s failing food truck experiment” and “Food trucks Alley Burger and Fries and Dolls no longer rolling in Calgary” reflected dismay that only two of the ten food trucks originally involved in a three year pilot program still service the city. The program started when city hall relaxed licensing rules. Restaurants were blamed for complaining about competition from the trucks which limited their own ability to run profitably. The reported result was the introduction of too many municipal restrictions for an acceptable return for the hard work and limited season involved.

Nevertheless, 40 food trucks were still licensed in late 2014, though many were reported to limit their operations to private events. An online service (www.yycfoodtrucks.com) profiles their 23 members and facilitates private event bookings. An app (streetfoodapp.com/Calgary) will display where and when any of their 44 subscribing food trucks is scheduled to be working in Calgary that day.

Food events. Coverage of Calgary food events included the second Eat Real YYC community local food festival at Casel Marche, where 16 food trucks were expected to participate in 2013, along with urban gardeners, farmers, chefs, local food artisans and other businesses. 3000 or more attendees were anticipated.

REAP’s Savour Sustainability Dinner held family-style at several local restaurants was covered, as was Christmas in November, where Taste Alberta’s ‘Fireside Chats’ featured local producers and chefs who talked about eating local in a moderated discussion with participants.

Calgary food walking tours offered to tourists and residents were also featured. These tours make stops at multiple food service outlets and restaurants for tastings and food learning.

Slow food. Members of the Calgary Slow Food Convivium attended their first international slow food conference and show in Italy (Terra Madre and the Salon de Gusto). They tasted foods that
were slow to produce, talked to producers of local food and heard speakers concerned about worldwide issues in food preservation, production and consumption. Each person the writer talked to had a different interpretation of what slow food is, but a common thread appeared to include preserving local food diversity and heritage.

- **Promotion/education about local food for consumers.** There was little clearly targeted, general consumer-oriented promotion of, or education about, local food. The 2013 Be Local insert was an exception, with articles explaining just what local food is; describing the need to support local producers and what may be different about local farming and retailing practices; providing a description of the benefits of a Localize shelf label; and profiling some retailers that focus on local sourcing.

  On its website, REAP blogs about food and beverages reflect the community and environmental values that the organization embraces that relate directly to buying local. Blogs, such as on the GoBarley website (e.g., encouraging interest in this “superfood” as a local alternative to imported rice) may be found by those already interested in reading about food.

- **Local food production.** One story addressed local production of food, with the headline featuring “sustainable and connected eating” (defined as food with a lower environmental impact). Local food was showcased as the method for achieving this benefit. The story traced the evolution of awareness, interest in and availability of sustainable food from a supply perspective. This included restaurants (e.g., participating in Vancouver Aquarium’s Ocean Wise sustainable seafood program), farmers' markets (which have increased from none to a dozen in Calgary over the past 20 years) and farmers who now deliver directly to restaurants (currently 60 at River Café). More farmers deliver CSA boxes.

  Observing that sustainable eating “has moved from being an activist ideal to a mainstream undertaking,” the writer drew attention to community gardens that have sprouted up over the past five years and an “explosion” of interest in people wanting to grow food in City backyards or checking out restaurants serving local foods. SAIT Polytechnic’s Jackson Memorial Garden has led the way in pushing back the seasons and the types of products grown.

  Food sustainability was described as a point of intersection of many larger themes, including economic (cost of small scale production vs. subsidies for commodity farms, keeping dollars in the province where they strengthen the food supply system), environmental (the need for food security and resilience as demonstrated during the 2013 floods, lower food footprint for vegetarian foods, logistics challenges) and social (socio-economic inequality, population growth, wellness and support for the community).

- **Community gardens.** Some members of corporate Calgary have found a way to embrace local food and support the local community at the same time. The Calgary Food Bank reported that 40,000 lbs of fresh produce was donated in 2014 by community gardens, such as the BP Chevron Garden and Eat’n, the Transalta Power garden, as well as Grow Calgary, a large socially conscious urban farm run by volunteers.

  An experimental Grow Calgary community garden – an earth ship greenhouse – faced challenges from neighbouring residents because of its messy appearance, even while they supported its objectives. If successful in using gathered rainwater and the sun’s rays to heat a vertical packed soil
retaining wall, it will provide a very intense cultivation area with multiple crop rotations and possibly produce tropical fruits. The intent is to provide more for the Calgary Food Bank.

- **Calgary Eats!** In a story covering the Calgary Eats! report on progress toward food sustainability, the number of community gardens was estimated to have increased exponentially over the last five years, from four in 2009 to 74 public and 67 private (i.e., with a defined user group) in 2014, with 25 more under development. Sponsored food gardens were featured, including a rooftop garden for the Mustard Seed (a not-for-profit organization serving the homeless), along with gardens maintained by various city restaurants, either on rooftops or on their grounds.

Also featured were: a business and restaurant sponsored program bringing apiaries and bees to the city; sponsored pilot projects to grow community orchards in food insecure areas of Calgary, with the number of trees planted in 2014 tripling over the previous year; to prevent waste, a volunteer-based fruit harvest program shares the yield between the tree owners, the pickers and the Calgary Food Bank; aquaponics is being used to challenge the short growing season and produces microgreens for one restaurant; SAIT is experimenting with an off-the-grid greenhouse to produce food year round and some restaurants are extending their season with the use of greenhouses.

The number of people involved in SPIN farming (Small Plot INtensive methods) on borrowed urban land rose to 12 from four in 2012. With their varied products, they formed YYC Growers and Distributors, offering a CSA and have obtained a grant to build a centralized refrigeration and processing hub to prepare their products for distribution.

- **Calgary Co-op.** In reporting its highest ever sales in 2013, Calgary Co-op attributed its success in a challenging and competitive environment to a renewed focus on fresh local foods: “We think being a local company listening to our members, giving them what they want, fresh, organics, gluten-free local products, they’re responding to that very strongly and shopping with us more frequently.”

Continuing this emphasis, the organization was developing a new fresh look for their stores and intended to introduce Fresh to Go areas where chefs prepare meals. They also partnered with Localize, which provides bright orange shelf labels that identify and promote regional and local food items along with ratings of the products based on how and where they are grown. The labels offer a Quick Response (QR) code link to information about the product and producer to shoppers on their mobile device. Sales of Localize items were reported to have risen by seven percent.

A new line of premium “Co-op Perfect” meats was launched in 2014 for members that requested products sourced from local producers using alternative production practices. The attributes for Co-op Perfect pork, beef and goat were not all the same, but included being raised in an open pen or open range environment and variously, no growth hormones, no antibiotics and being grass or grain fed.

Pop-up farmers’ markets were then held at Calgary Co-op locations to emphasize the organization’s commitment to local producers and to give customers a chance to buy products not normally seen in grocery stores.

- **Information for producers.** Information directly targeted to the producer was identified in various media. For example, Farm Credit Canada (FCC) offers an online definition of what the local
food movement is and outlines success strategies for smaller farms that include a suggestion to “think local,” among other business suggestions.

Technomic Inc. shares information with subscribers. In a recent webinar covering On the Menu Trends, they shared consumer survey results relating to local sourcing – items such as willingness to pay more for food and beverages that are locally sourced (30% each for soup and salad, 31% among customers at fast-casual restaurants and 25% at fast-food outlets) and that two-thirds believe that an item that is described as “local” is more flavourful (personal communication from ARD, Jan 2015).

Small Farm Canada ran an article explaining what regional food hubs are, the benefit they offer small farmers in reaching a larger market, the challenges they face, the services they provide and their level of development in Canada (well behind the United States, which offers the diverse Canadian organizations currently exploring the concept experience to learn from).

ARD (Alberta Agriculture and Rural Development) has pages of information on the Internet that help producers access opportunities for local market expansion through the Explore Local Initiative and obtain assistance ranging from information and networking links to educational resources like webinars, workshops and conferences. Many other pages on the ARD website provide further information to support operations and marketing decisions. The Department also publishes directories like Alberta’s Agricultural Processing Industry Directory 2014, which lists food and other agricultural processors and identifies key support services and agencies available to agri-producers.

On the other hand, the Calgary Regional Partnership stated the following on its website, “The Calgary Region is a production centre for rural agricultural production, enabled by superior global transportation linkages” but did not appear to present statistics or offer support to this sector.

At the national level, The Canadian Society of Nutrition Management offers members continuing education. A recent article in their News publication responded to growing consumer interest in nutrition by profiling a program that meets consumer preference for a restaurant with nutrition information over one without. The Informed Dining Program in British Columbia is a voluntary program where participating restaurants provide their customers with easily accessible and understandable nutrition information (calories and the 13 core nutrients) for all standard menu items before they make their menu decision. As a result of the collaborative development approach undertaken, the program grew from the initial 300 participating restaurant outlets in 2012 to over 2000 a year later and, since being made available to restaurant chains’ outlets outside British Columbia, has grown to use in over 10,000 locations. Small independents, mobile food vendors and public institutions were also participants.

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PUBLISHED ARTICLES, REPORTS AND PAPERS

Very little formal work directly related to Calgary’s local food channels, or within the wider parameters of this study’s objectives, was identified. Each article or publication selected, a few of which originate outside the region, is discussed briefly below, highlighting relevant research and findings.

- Kristi Peters Snider. (Undated) Calgary chefs speak out about sustainable food systems.
- http://www.imaginecalgary.ca/ (last accessed Feb 2015)

Under the City of Calgary’s Office of Sustainability, imagineCALGARY developed a Long Range Urban Sustainability Plan in 2006. Six food-related targets from that plan guided the work of the Calgary Food Committee in its stakeholder and public consultations while developing the Calgary Eats! report and action plan.

1. By 2036, Calgarians support local food.
2. By 2036, Calgary maintains access to reliable and quality food sources.
3. By 2036, the consumption of urban and regionally produced food by Calgarians increases to 30 per cent.
4. By 2036, 100 per cent of Calgary’s food supply derives from sources that practice sustainable food production.
5. By 2010, 100 per cent of Calgarians have access to nutritious foods.
6. By 2036, sustainable urban food production increases to five per cent.

A sustainable food system was described as a network connecting food production, processing, distribution, access, consumption and food waste recovery, as shown in the diagram alongside.

Six key principles were defined as being required to make up a sustainable food system and to achieve the above targets: Local (Targets 1 and 3), secure supply (2),...
environmentally sustainable (4), healthy (5), accessible (2) and community development (6).

Calgary Eats! then addressed each of the food system components individually, describing its required characteristics, present state, issues/challenges facing the component and opportunities to address them. Each section concluded with a description of gaps and recommendations.

The final sections of the report critiqued the existing evaluation criteria and indicators for each of the targets, outlined roles for action by key groups and recommended further action, based on the identified gaps, to be led by the Calgary Food Committee Stewardship Group.

In its 2014 evaluation, the Calgary Eats! Progress Report includes the statement that “the majority of food initiatives in recent years, from urban agriculture to backyard beekeeping to food waste recovery, are driven by the community. The Calgary community is currently responsible for the progress we have made towards the achievement of the 2012 Calgary EATS! Action Plan.”

Carol Pierce, Faculty of Environmental Design, University of Calgary. (Sep 2014) Eating Local: Defining the local foodshed to meet local food goals. (Master’s Thesis)

This thesis describes how foodshed mapping, applied to the local food target outlined in the City of Calgary’s “imagineCALGARY” Long Range Urban Sustainability Plan, offers a way to visually understand the distance that different types of foods travel, the production area that makes up the local footprint and local food production capacity.

For example, “Figure 5.1 visually captures the distance by road that food would have to travel to meet food demand based on current available production data and farming practices. Figure 5.1 also shows that wheat and oilseed crops dominate regional production in Alberta and BC. Significantly, at the distance of approximately 600 kilometres from Calgary, BC produces greater amounts of fruits and vegetables at closer distances to Calgary than some production areas in Alberta where production of those foods is limited or does not exist at all.”
Carefully considered assumptions and limitations are outlined in relation to the baseline food map for 2011 shown in Figure 5.4. Another map showed the smallest composite foodshed that could potentially meet a future 30% local food consumption goal for the population of Calgary in 2037. The author concluded that “… realistically, Calgary’s composite foodshed extends beyond provincial boundaries in both study years. Since some foods, such as fruits and vegetables would have to travel approximately 938 kilometres to reach Calgary, it may be prudent for municipal policy makers to maximize production potential for a few individual food groups rather than for an overall local consumption goal.”
Foodshed maps for each of the nine individual product groups are presented for both years, allowing the visualization of production areas and distances geographically rather than numerically. They may help change perceptions and facilitate strategic discussions about the best local food types and mix, production goals and strategies.

Providing additional food for thought, Pierce writes, “Where available production allocation is concentrated within a province, foodshed maps show that Provincial boundaries can burden a large city like Calgary with an unnecessarily large food footprint. The maximum distance from which Calgary’s 30% local food consumption target could be met (for poultry and eggs [in 2037]) was a little over 1,000 kilometres, which may be contentious to those concerned with impacts from food miles.”
Canada NewsWire. (Aug 20 2013) _Canadians have growing appetite for local food._

A Conference Board of Canada study for the Centre for Food in Canada provided some interesting insights into the penetration of local food and made recommendations that were quite different to the direction generally taken to promote its use.

Their analysis revealed that 20 percent of food by value is consumed within the same province in which it is produced, led by Quebec at 29 percent and Ontario at 24 percent, with strong consumption also found in British Columbia (16 percent) and Nova Scotia (13 percent).

Local food systems were found to have economic benefits for a wide range of businesses. The largest economic benefits went to small and medium sized producers, as well as retailers and food service operators that focused on niche and premium markets.

They felt that the pattern that most food grown locally in Canada is sold through large retail chains and major distributors within the food system is likely to continue. Taking that into account, actions recommended to support local food systems included:

- Provide small and medium producers with additional information and guidance on direct marketing and selling local products to large retailers in the broader food system.
- Retailers, food service operators and distributors should extend their work with local producers to increase the availability and visibility of local food, and label these products as local.
- Governments - both provincial and local - could expand their leadership in local food marketing and labelling initiatives.
- Public sector institutions could make procurement of local food a priority when cost-effective and efficient to do so.

By integrating local food more deeply into the broader national food distribution system, local producers and ultimately the whole food economy was expected to benefit.


In this paper the environmental benefit of local food, specifically whether the energy footprint of local distribution is smaller than for imported food, was explored in a case study conducted at River Café, a Calgary fine dining restaurant. Study results did not support the assumption of a one to one correlation between distance travelled and emissions. They suggested that local food should not be assumed to be low energy, probably due to the multiple small deliveries that are made by farmers in personal cargo-type vehicles. As a result, distance alone does not determine environmental impact. Although the energy land footprint of the conventional food system remained higher, due to logistical efficiencies, the difference was not as large as one might expect.²

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² The City of Calgary makes claims that are not consistent with these results or others quoted by the author (http://www.calgary.ca/UEP/ESM/Pages/Reducing-Calgarys-ecological-footprint/Calgarys-local-food-scene/Calgarys-Local-Food-Scene.aspx)
Humaira Irshad, ARD Rural Development Division. (July 2010) Local food – A rural opportunity.

This literature review outlined potential opportunities to develop a local food system and the role government at all levels might play based on learnings from other provinces and countries.

Barriers such as a lack of financing for small producers, a limited growing season, a lack of local processing infrastructure, limited work on developing local food systems and, most importantly, a lack of information on the consumer and the social and environmental consequences of the conventional food system, were identified.

Opportunities existed to encourage a local food system by fostering promotional programs focused on local consumers and programs to create direct links and encourage purchasing between local growers and local institutions. Strategies to achieve increased processing capacity included low interest small loan programs for young farmers or a cost share program to help farmers transition to local food production. Avenues for encouraging a local food system included increased market access, including improved links between local producers and area distributors, greater private sector involvement and improved agriculture education.

The specific roles identified for governments were the provision of system-wide support for food grown using sustainable methods, fostering of appropriate technology for small-scale farms, improved labelling laws and supporting research and extension programs to distribute information and research findings. Municipalities in particular were encouraged to make planning for food part of the municipal planning process and to revise municipal bylaws to welcome local food production.

Normand Bourgault. (January 27 2014) Marketing local products: The bumpy road from the farm to the table. (Farm Management Canada Webinar.)

The study results highlighted by Professor Bourgault were not from Calgary, but are included here because they were based on a rare live experiment, which is more credible than commonly used survey approaches investigating the importance of place of origin labelling.

Supermarket shoppers in two municipalities (n=625 in total, split into 5 experimental groups) saw two tubs of self-serve potatoes, each clearly labelled as being the “Product of …” Each experimental group saw labelling for two out of the three regions covered in the study: the immediate or a close region (Abitibi), the province (Quebec) and another province (Ontario). The results showed strong preference for one’s own region, then one’s province and only then, another region within the province. The out-of-province source was least preferred. The conclusion that “place of production is a major selection criterion” was borne out by choices favouring the region or province by 67% to 85% of the shoppers in each of the dyads tested.

Intercepted after they made their choice, the potato purchasers revealed that criteria for preferring local were psychographic and reflected a strong sense of belonging, strong solidarity with and a strongly positive attitude toward the region.


A survey of 25 CSA operators in Alberta revealed that the majority are located near Edmonton or Calgary (about equally split). Others were near small urban centres, in rural regions or northern Alberta. The largest portion of the arable land base of responding operators lay in the Calgary area (39%, consistent with the 40% who operated there). However, the amount of land devoted to the Calgary CSAs was less than proportionate (31%), suggesting that producers elsewhere dedicate a higher proportion of their resources to their CSA and revealing a potential opportunity for new or expanded Calgary Region operations.