Study of Local Food Demand In Alberta 2016

Consumer Study Report

Prepared for: **Alberta Agriculture and Forestry**

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EXECUTIVE SUMMARY

Introduction

The demand for locally-produced food in Alberta has risen as consumers' interest in the foods they eat, and where the food was grown, has increased. Within Alberta, producers are increasingly selling local food to Albertans through market channels such as farmers' markets, u-picks, on-farm stores, roadside stands, off-site farm stores, community supported agriculture (CSA), food basket programs and grower cooperatives, as well as local restaurants that source food ingredients directly from Alberta producers.

Working with producers, food processors and entrepreneurs, Alberta Agriculture and Forestry (AF) develops opportunities for local market expansion through Explore Local. In 2004, AF developed a baseline estimate of consumer expenditures on food items sold through various direct-to-consumer market channels in Alberta.[1] The study has since been repeated in 2008 and 2012, as well as in the current year 2016. The current project was designed to assess the demand for local food available in Alberta through farmers' markets, farm retail and restaurants offering locally-sourced ingredients. A short section was included for CSA/box programs. Further, the study examined the:

- preferred methods of communications with farmers or suppliers of local food; and
- degree of consumer acceptance of local food as "food grown or made in Alberta."

Critical to the study of local food demand is the definition of what makes a food "local." For the purpose of the 2016 study, local food was defined as "food grown or made within Alberta." The market definitions used in the survey included:

- **Farmers' markets**: a place or space which is open on a regular scheduled basis, where one can buy fresh fruits and vegetables, bedding plants and flowers, herbs, honey, meat and other farm products, including processed food like jams, pies and sausages, from farmers and growers who sell at stalls or tables there.
- **Community supported agriculture or community shared agriculture and box programs**: households purchase a subscription to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products, every week.
- **Farm retail**: buying products like fresh fruit and vegetables, flowers, bedding plants and nursery stock, herbs, meat and other farm products, including wine, honey, jams, pies and sausages at a farm or ranch gate or by the Internet or mail from a farm.
- **Restaurants serving local food**: a restaurant or other type of eating establishment serving food prepared from ingredients that are grown or made in Alberta.

A 22-minute telephone survey (on average) of a random and representative sample of households across Alberta was conducted from November 1, 2016 to December 15, 2016. Respondents were any adult over the age of 18 who was a head of the household in a position to talk about past food purchases and expenditures made by their household. Regional quotas were used to ensure representative completions by region, which included the Edmonton CMA, Calgary CMA and other Alberta. In total 1,200 survey completions were obtained. By region, 400 survey completions were obtained each for the Edmonton CMA, Calgary CMA and other Alberta. The final data set was weighted prior to completing the analysis and reporting.

[1] Alberta Agriculture and Forestry, Request for Proposals Number AF17-0317, *Study of Local Food Demand in Alberta, 2016* (PDF)

Awareness

Albertans' awareness of farmers' markets and farm retail continues to increase. From 2004 to 2016 there has been a growing number of Albertans indicating that they "know a lot" about farmers' markets; with the greatest increase, of 11%, occurring between 2012 and 2016. Overall, awareness of farm retail also grew, with more respondents reporting that they "know a lot" in 2016 (15%) as compared to any other year. Awareness of CSA/box programs appeared to remain constant, however, these findings should be interpreted with caution since the survey scale changed from 2012 to 2016. Familiarity with the farmers' market and farm retail channels is related to purchasing patterns, with purchasers being more familiar than non-purchasers.

Market Size

Among the markets explored, farmers' markets continue to be the most highly used local market channel. The majority (78%) of respondents had made at least one purchase at a farmers' market in 2016, up from 72% of respondents in 2012. However, although fewer people used the farm retail channel, overall, it saw the greatest increase in utilization across the four years. Thus, in 2016 there was a 9% increase in the percentage of respondents who had purchased from the farm retail channel as compared to 2012. The CSA/box channel (3%) and restaurants serving local foods or ingredients (1%) only made small gains in utilization from 2012.

In 2016, an estimated 1.289 million households purchased from farmers' markets, 586,000 households purchased from farm retail, and 383,000 households purchased from Alberta restaurants serving locally-grown or made ingredients. Based on future estimated household spending, as well as households leaving the market, the projected rate of growth in the next 12 months is 3% for farmers' markets and 8% for farm retail. This translates into 1.330 million households in Alberta that will be purchasing from farmers' markets, and 631,000 households purchasing from farm retail.

Market Value

Visitation is up across the farmers' market and farm retail channels, with a higher proportion of households in 2016 reporting that they purchased from the channel 14 or more times as compared to 2012. Overall, proportion of those who purchased 14 or more times in a year has increased 9% for farmers' markets and 6% for farm retail. For Alberta restaurants serving local ingredients the proportion of households who purchased 14 or more times stayed the same at 22%. Further, households are spending more, annually, in two of the three channels: farmers' markets ($737), farm retail ($559). Annual expenditures on restaurants that serve local ingredients decreased in 2016 to $1,045.

Increased annual spending in farmers' markets and farm retail can be attributed to increased spending per visit. Farmers' markets saw an increase in average per visit spending at $70 dollars per visit; up $15 dollars per visit from 2012. Spending per visit at farm retail also increased in 2016 after a plateau in 2008/2012. On average, households spent $21 dollars more per visit in 2016 as compared to 2012. Spending at restaurants that serve local food declined in 2016. Households spent $13 dollars less, on average, at this channel in 2016 compared to 2012.

The estimated market value for the 2016 year is $924.5 million for farmers' markets and $303.7 million for farm retail. In-season, both farmers' markets and farm retail had a much higher market value than out-of-season (farmers' market in-season $690.6 million; farm retail in-season $203.0 million).

Due to the increase in the proportion of non-purchasers indicating that they plan to purchase from farmers' markets and farm retail in the future compared to previous years, it is estimated that new purchasers will make a greater contribution to the spending increase than existing purchasers in both channels. This result is expected as new purchasers have a higher proportional impact when compared to existing purchasers. For example, a new purchaser that purchases $15 from a farmers' market has a higher proportional contribution than an existing purchaser who increased their purchases from $20 to $25 in the following year.

Seasonal Use

From 2012 to 2016, the definition of season was altered in the survey. In 2012, respondents were asked questions about three seasons: fall (September to October), winter (November to April) and summer (May to August). In 2016, this was changed to in-season (June to October) and out-of-season (November to May). For the purpose of comparison, previous years' findings for out-of-season are compared to winter and findings for in-season are compared to summer. In 2016, as in 2012, the majority of the purchases for farmers' markets (56%) and farm retail (59%) occurred during in-season. Purchasing out-of-season remained the same for farmers' markets (2%) and increased 6% for farm retail. With regards to year round purchases, in 2016, 42% of households purchased from farmers' markets year round which was an increase from 34% in 2012. For farm retail, 33% of households purchased year round which was an 11% increase from 2012.

Considering season, in-season compared to out-of-season, households are making more purchasing visits (8.6 vs. 6.1) and spending more ($572 vs. $440) at farmers' markets. At farm retail, however, households are making more purchasing visits (5.2 vs. 5.0) but spending less ($413 vs. $469) in-season compared to out-of-season which is consistent with 2012 survey findings.

Market Profiles

By gender, both males and females equally reported purchasing at farmers' markets, farm retail and CSA/box programs. For restaurants serving local ingredients, however, women are 9% more likely to have purchased in 2016.

By life stage, all households are more likely to have visited farmers' markets than any other local food market channel; with young family purchasers (85%) and empty nesters (88%) being most common purchasers within this channel. At the farm retail channel, purchases are most commonly made by young family purchasers (66%), followed by older family purchasers (51%). CSA/box programs are again being utilized by young family purchasers (19%), but young singles and couples (15%) and empty nesters (16%) also showed interest in this channel. Empty nesters (33%) frequented restaurants serving local ingredients more often compared to all other groups.

Household income impacts purchasing patterns in all markets other than restaurants serving local ingredients, which could be the result of including fast food restaurants. Households with an income of $120,000 or more are more likely to have purchased at farmers' markets (85% compared to 78%), farm retail (55% compared to 36%/46%) and CSA/box programs (18% compared to 8%/11%). Education level does not appear to greatly impact purchasing patterns.

Purchasing varied by community size for farm retail and CSA/box programs. Market penetration for farm retail is greatest for small centres and farm/ranch purchasers; whereas households in Calgary and Edmonton are least likely to have purchased from the channel. Similarly, small centre and farm/ranch purchasers more commonly use CSA/box programs. For farmers' markets and restaurants serving locally grown ingredients, households found in Calgary, Edmonton, other large urban centers, small centers or farm/ranch areas are equally likely to have purchased.

Food Grown or Made in Alberta (Local Food)

Unprompted, the majority (92%) of Albertans have heard of the term local food and the majority (96%) consider food grown in Alberta as local food. Considering all of the channels in which a household could have purchased local food, 98.7% of the households surveyed had purchased local food at least once in the last year. Most households (76%) noted that they would spend the same on local food as last year, with the average expenditure on local food per visit at $59 for farmers' markets and $125 for farm retail. Further, households spent on average $75 in restaurants serving local food.

Food grown or made in the province and sold through farmers' markets and farm retail is valued at $753.7 million and $279.3 million respectively.

Purchasing Outlets

As in 2012, supermarkets (92%) continue to be households' most commonly used source for local food, followed by farmers' markets (80%), club stores (48%), and directly from a farm or ranch (46%). Other market channels respondents bought local food included mass merchandisers (for example a Walmart Supercentre) (43%), small grocery stores (40%), specialty stores (39%), and health, natural or organic food stores (38%).

Survey questions also asked respondents their most preferred source for local food. The most common sources included supermarkets (60%) and farmers markets (19%).

Communications with Farmers' Market Vendors and Farm Retail

To communicate with farmers' market vendors that respondents purchase from, respondents commonly communicate in person (64%), by telephone (16%), internet/website (12%), email (10%), or not at all (17%). The preferred method of communicating with these vendors to keep up-to-date with activities or events is in-person (45%), however, followed by email (13%), and through internet/websites (11%), rather than by telephone (8%).

Influences on Buying Decisions

The factors that most commonly had an "extremely strong" influence on Alberta households' decision to purchase local food are the safety of the food (47%), the fact that purchasing supported Alberta's family farms (46%), as well as, the freshness (43%), quality (41%), taste (40%), and nutritional value (36%) of the food. Overall, however, none of the factors presented to respondents were felt to be unimportant, as all were ranked six or above by at least two-thirds (69%) or more of the respondents.

Local Food Purchaser Profiles

Many factors influence households' purchasing behaviours with respect to local food. Women appear to be seeking out local food, thus, they more commonly shop at a farm retail channel out-of-season and shop at specific retailers because they carry local food. Further they are more likely, than men, to plan to go to a farmers' market in the future.

Individuals between the ages of 18 to 34 are the most likely to shop local food at farmers' markets while those aged 35 to 44 were least likely. Those aged 45 to 54 are the most likely to frequent restaurants that serve food made with local ingredients. The youngest cohorts, aged 18 to 34 and those aged 35 to 44 are more commonly shopping for local food at farm retail channels or are members of CSA/Box programs.

Households with married or common-law couples are the greatest consumers of local food through all channels. Similarly, households with incomes above $120K more frequently purchase local food through all channels except restaurants that serve food with local ingredients. In contrast, rural households are significant consumers of farm retail and will travel to purchase food from the channel.

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SECTION 1: INTRODUCTION AND METHODOLOGY

1.1 Introduction

The demand for locally-produced food in Alberta has risen as consumers' interest in the foods they eat, and where it was grown, has increased. Concerns about food quality, health and nutrition, food safety and local economies have led to a rise in the number of people regularly visiting farmers' markets and restaurants serving Alberta ingredients.[2] Research indicates that societal and personal motivations are the two major reasons for purchasing locally-grown/produced foods.[3] Personal motivations for buying locally-grown/produced food include that it tastes better and provides a connection with rural life. Others personal motivations include the belief that locally-grown food is considered healthier. Societal motivations include the impression that local food is more environmentally sustainable and more socially responsible. Some consumers also believe that the consumption of locally-produced food is a way of preserving local heritage and tradition.[4] In addition to the factors listed above, Alberta's growing population, which has increased by just under 400,000 people in the last five years, is also resulting in a higher demand for local food.

Within Alberta, producers are increasingly selling local food to Albertans through 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, as well as local restaurants that source food ingredients directly from Alberta producers.

Working with producers, food processors and entrepreneurs, Alberta Agriculture and Forestry (AF) develops opportunities for local market expansion through Explore Local. In 2004, AF developed a baseline estimate of consumer expenditures on food items sold through various market channels in Alberta.[5] The study has since been repeated in 2008 and 2012, as well as in the current year 2016.

Critical to the study of local food demand is the definition of what makes a food "local." The term "local food" has been defined in many ways. Some definitions are based on the concept of proximity, specifically, the total distance that a food item can be transported. However, other definitions consider how the food is produced and sold, as well as the perceived health and environmental benefits associated with the food. For the purpose of the 2016 study, local food was defined as food grown or made within Alberta.

[2] Conference Board of Canada (2013) Canada's Growing Appetite for Local Food. Centre for Food in Canada. Retrieved from: http://www.actualitealimentaire.com/wp-content/uploads/2013/08/14-021_localfood_cfic_rpt.pdf

[3] Constanza, B. and Gary, M. (2015) Drivers of local food consumption: A Comparative Study. British Food Journal, 117(9), pp. 2282-2299.

[4] Constanza, B. and Gary, M. (2015) Drivers of local food consumption: A Comparative Study. British Food Journal, 117(9), pp. 2282-2299.

[5] Alberta Agriculture and Forestry, Request for Proposals Number AF17-0317, *Study of Local Food Demand in Alberta, 2016* (PDF)

Purpose and Objectives

The current project was designed to assess the demand for local food available in Alberta through farmers' markets, farm retail and restaurants offering locally-sourced ingredients. A short section was included for CSA/box programs. Further, the study examined the:

- preferred methods of communications with farmers or suppliers of local food; and
- degree of consumer acceptance of local food as "food grown or made in Alberta."

The findings from the survey are reported by:

- Awareness;
- Current and projected market size;
- Market value;
- Market profiles; and
- Food grown or made in Alberta.

1.2 Methodology

A 22-minute telephone survey (on average) of a random and representative sample of households across Alberta was conducted from November 1, 2016 to December 15, 2016.

Households were initially contacted by telephone, and any adult over the age of 18 was asked to participate if they:

- were a head of the household; and
- felt that they were "in a position to talk about past food purchases and expenditures made by their household."

Given that the respondent could speak to the food purchases of the entire household, it is anticipated that the survey responses reflect the purchasing behavior of the entire household. Quotas for gender were not used. Overall, 63% of the respondents were female and 37% were male.

Questionnaire

The questionnaire was designed in collaboration with the AF research team, using the 2012 survey instrument as a baseline. Wherever possible, the questionnaire remained unchanged from 2012 to allow cross-year comparability. To support survey completion, a telephone script and an answering machine script for surveyors was developed.

The questionnaire used in 2016 was changed in the following manner:

- The "Alberta grown or made local food" section was moved to the front of the survey, and:
    - Survey participants were asked to provide their own definition of local food;
    - A definition of local food was provided prior to the onset of the survey; and
    - The variables influencing peoples' decisions to buy local food based on literature findings were updated.
- The purchasing reference periods used in 2012 were modified from "summer" (May to August), "fall" (September to October) and "winter" (November to April) to "out-of-season" and "in-season."
- The "out-of-season" time frame was defined as November 2015 to May 2016; while the "in-season" time frame was defined as June 2016 to October 2016.

- Four questions from the CSA Box/Program section were removed (CSA3-CSA6) due to low response rates in the 2012 survey.
- Questions in the series pertaining to spending amount were modified. Specifically, in 2016 the first question in the series asked about total spending on all purchases; this differed from 2012 when the first question asked for total spending excluding crafts. However, the second question in the series remained the same as in 2012.
- Questions pertaining to projected visiting and spending frequency were modified. In 2016, respondents were initially asked if they will spend more, less or the same per visit and what that dollar amount was projected to be. If they selected "do not know" they were then asked if they could report the dollar amount as a percentage of previous spending.

The re-designed approved questionnaire was subjected to cognitive testing completed in two focus groups with individuals residing within the Edmonton Census Metropolitan Area (CMA). Focus groups were held on August 17, 2016 at 5:00 pm and 7:00 pm. In total, 13 individuals participated in the focus groups: seven in the first focus group and six in the second group. Based on the focus group sessions, minor changes were recommended and implemented to the survey (see Appendix A for a complete list of all questionnaire changes).

The finalized questionnaire was programmed into Computer Assisted Telephone/Web Interviewing (CATI/CAWI) software, CallWeb. The completed CallWeb form was extensively tested in-house to ensure the accuracy of the survey's skips logic and calculation functions.

The implications of the changes to the questionnaire, when comparing the 2016 findings to the previous years, are as follows:

- Collapsing three seasons (Fall, Winter and Summer) into two periods (in-season and out-of-season) means that the two seasons now represent longer buying periods, and may have resulted in a greater purchase frequency and overall spending value. In-season, which is compared to summer, is now five months instead of four months. Out-of-season, which is compared to winter, is now seven months instead of six months.
- Asking respondents to report "total spending" rather than "total spending, excluding crafts" may have resulted in slightly higher total spending values in 2016.

Sample

The sample for the survey was obtained from ASD Survey Sampler. The sample included 70% known telephone phone numbers for households in the greater Edmonton region and 10% cell phone numbers. Additionally, 20% of the sample was comprised of random digit dialing to obtain unlisted telephone numbers. In total 25,357 pieces of sample were used (Edmonton CMA 7,307; Calgary CMA 9,471; and other Alberta 8,578).

At the 95% level of confidence, the sample margin of error was $\pm$ 3.1%, 19 times out of 20.

The sample size obtained for each market, and the total sample, plus the associated margin of error are shown in Table 1.

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

	Number of purchasing households		Margin of error (95% level of confidence)
	Unweighted sample	Weighted sample	
Farmers' markets	940	938	±3.2%
Farm retail	413	426	±4.8%
CSA/box programs	55	62	±12.5%
Restaurants chosen for use of Alberta ingredients	278	279	±5.9%
At least one of the four local food market channels	1,011	1,015	±3.1%
Total Sample	**1,200**	**1,200**	**±2.8%**

Survey Completions and Weighting

Regional quotas were used to ensure representative completions by region; which included the Edmonton CMA, Calgary CMA and other Alberta. Quotas for gender were not used. An average of 3.5 calls were made on each piece of sample; with up to eight calls made to some households.

In total 1,200 survey completions were obtained. By region, 400 survey completions were obtained each for the Edmonton CMA, Calgary CMA and other Alberta.

The data was weighted to Canada Post statistics for "total residential points of call" prior to analysis. For weighting purposes survey completions were categorized into six regions of Alberta. The regions included the City of Calgary, Calgary region, the City of Edmonton, Edmonton region, other major centres (Fort McMurray, Grande Prairie, Lethbridge, Medicine Hat, and Red Deer), and rural communities. Rural communities were defined as any community outside of those listed.

The sample was distributed proportionately to the population of households in each of the six regions, based on Canada Post statistics for "total residential points of call." The total number of households, population distribution, and un-weighted and weighted sample are presented below in Table 2.

Table 2: Population and Sample Size by Sampling Region

Region	Number of households	Population distribution	Un-weighted completions	Weighted completions
Calgary CMA	**544,409**	**33.0%**	**400**	**396**
City of Calgary	503,854	30.5%	351	366
Calgary region	40,555	2.5%	49	30
Edmonton CMA	**536,900**	**32.5%**	**400**	**390**
City of Edmonton	395,850	24.0%	248	288
Edmonton region	141,050	8.5%	152	103
Other major centres	**175,349**	**10.6%**	**244**	**127**
Rural	**394,393**	**23.9%**	**156**	**287**
Total Alberta	**1,651,501**	**100.0%**	**1,200**	**1,200**

Report Format

The current report presents the findings for the 2016 survey period. Data for the 2016 survey period is compared to data from 2008 and 2012 in graphs and tables throughout the report. Where they exist, trends across time are highlighted.

The report is divided into five sections:

- **Awareness** examines the extent to which Albertans were aware of, visited and made purchases from farmers' markets, farm retail and restaurants selling local food.
- **Current and projected market size** looks at the number of households that purchased from each market in the past 12 months, as well as, households that anticipate entering or leaving a market.
- **Market value** estimates the value of each market in the previous and in the projected year.
- **Market profile** examines the characteristics of the households that made purchases in each of the market channels.
- **Food grown or made in Alberta** speaks to the purchasing behaviours and motivations of households in relation to food grown or made in Alberta.

Product Definitions

For each market a definition was provided at the start of the survey section. Additionally, other definitions were provided through the survey to assist respondents in answering the questions. Definitions for the markets remained consistent with the 2012 study and included:

- **Local food**: food grown or made in Alberta.
- **Farmers' markets**: a place or space which is open on a regular scheduled basis, where one can buy fresh fruits and vegetables, bedding plants and flowers, herbs, honey, meat and other farm products, including processed food like jams, pies and sausages, from farmers and growers who sell at stalls or tables there.
- **Community supported agriculture or community shared agriculture and box programs**: households purchase a subscription to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products, every week.
- **Farm retail**: buying products like fresh fruit and vegetables, flowers, bedding plants and nursery stock, herbs, meat and other farm products, including wine, honey, jams, pies and sausages at a farm or ranch gate or by the Internet or mail from a farm.

Other important definitions included:

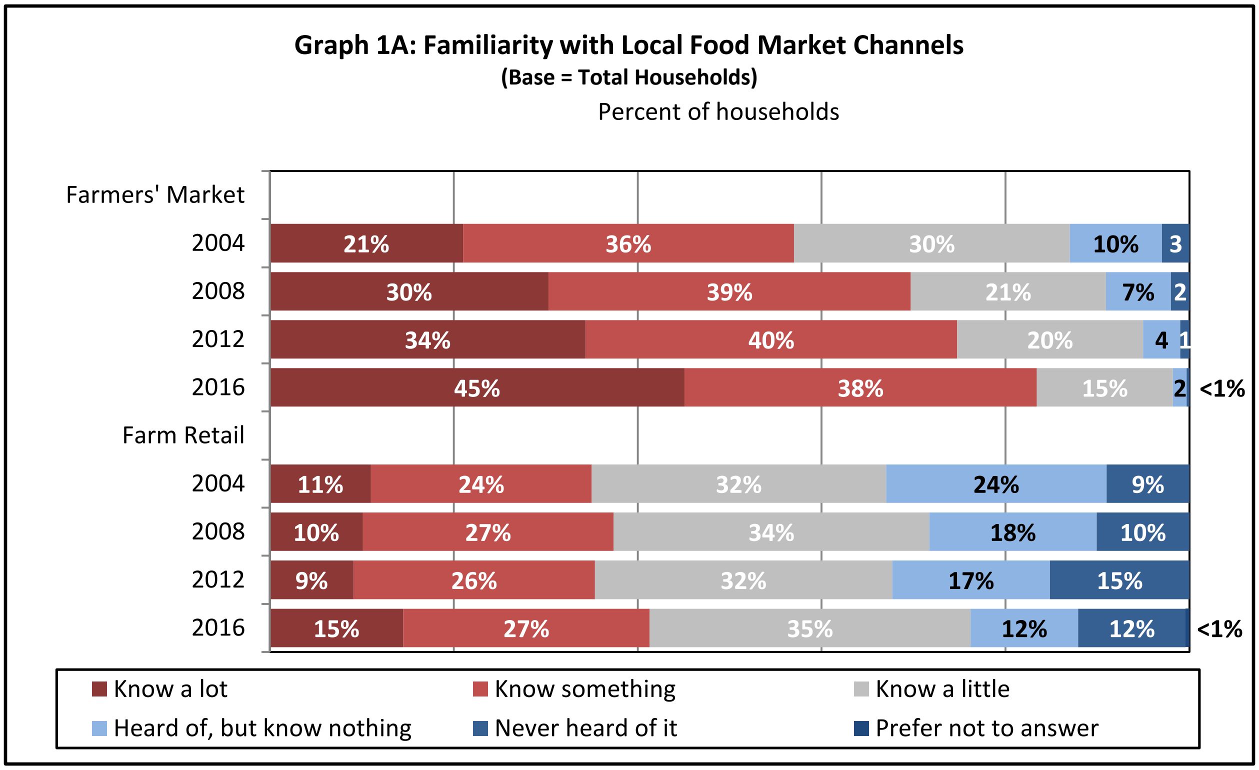
- **In-season**: June to October.
- **Out-of-season**: November to May.

SECTION 2: SUMMARY OF FINDINGS

2.1 Awareness

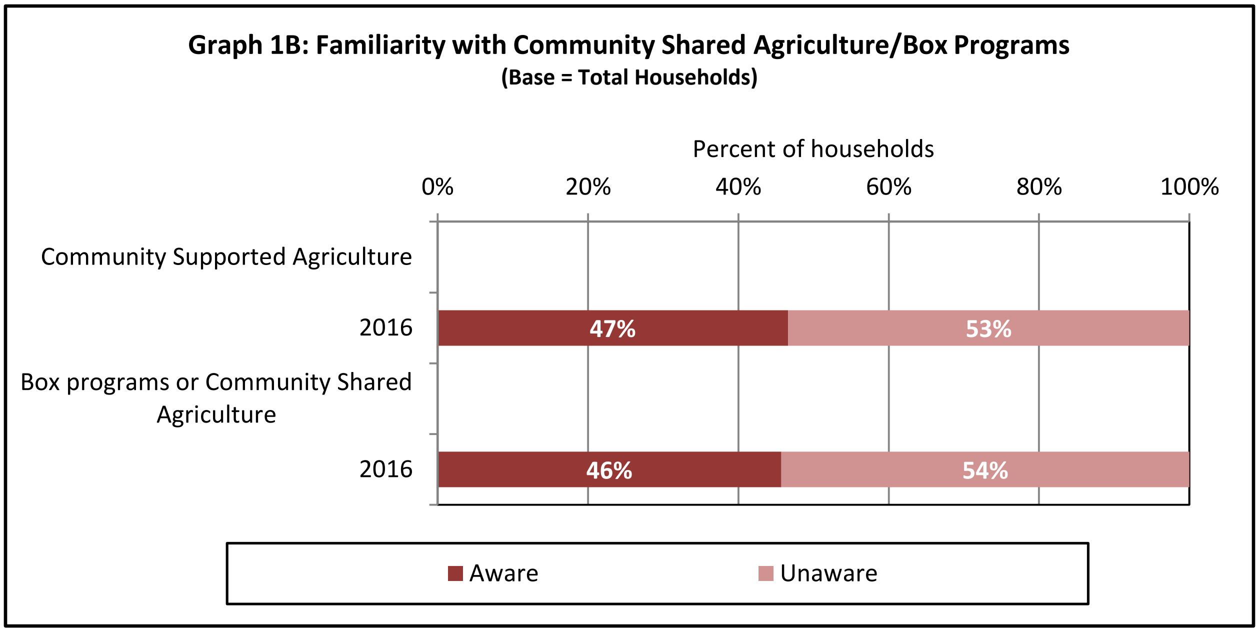
Albertans awareness of farmers' markets and farm retail continues to increase. From 2004 to 2016 there has been a growing number of Albertans indicating that they "know a lot" about farmers' markets; with the greatest increase, of 11%, occurring between 2012 and 2016. Overall, awareness of farm retail also grew, with more respondents reporting that they "know a lot" in 2016 as compared to any other year. In 2016 very few respondents had never heard of farm retail (12%) and even fewer had never heard of farmers' markets (<1%).

For both farmers' markets and farm retail, future gains in familiarity will need to come from increasing the familiarity of those who know "a little" or "something" to the level of "knowing a lot," since few people have not heard of either channel.



Source: FM1, FR1 (n=1,200)

Note: 2016 percentage of "Prefer not to answer" responses for Farm retail (<1%)

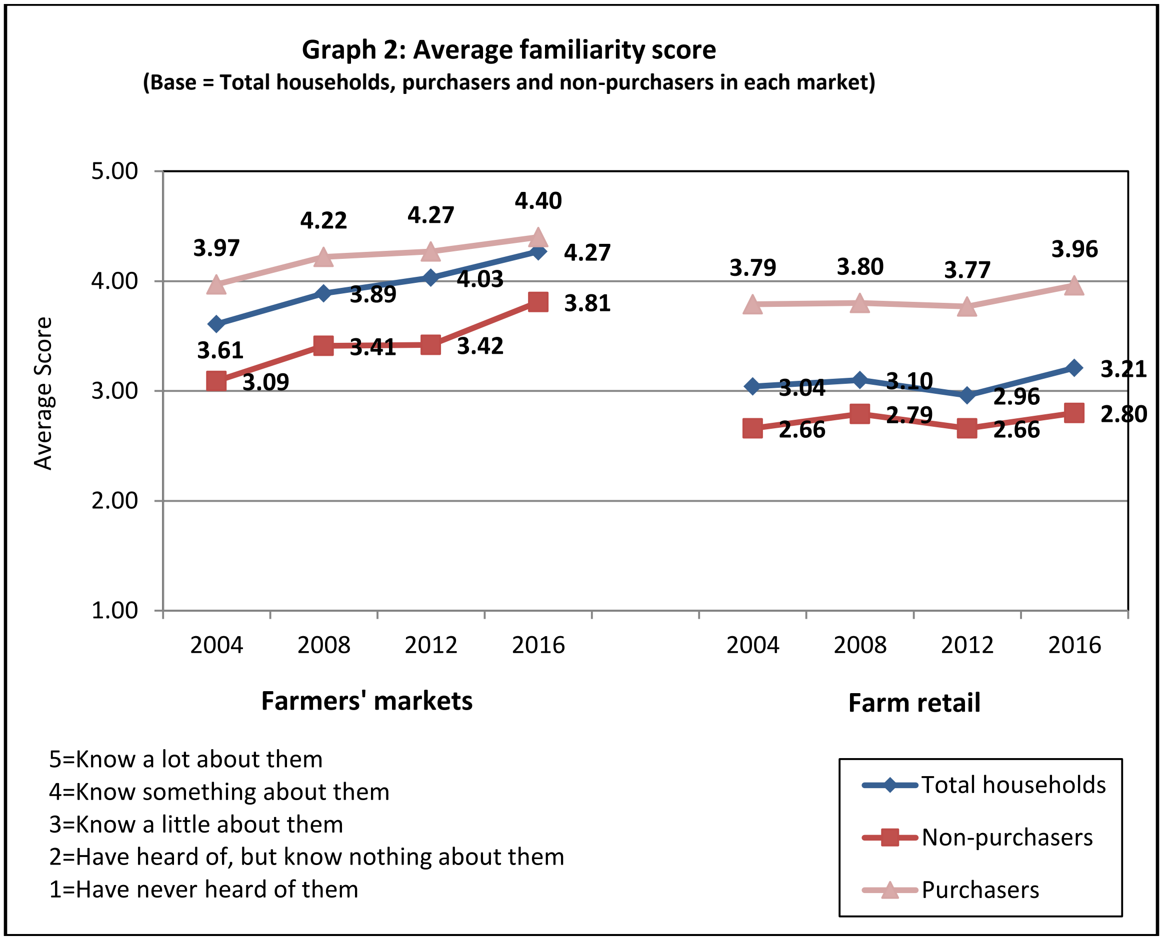


Source: QCSA1a, QCSA1b (n=1,200)
Note: QCSA1a and QCSA1b were only asked Aware/ Unaware in the 2016 survey.

As shown in Graph 1B, almost half (47%) of respondents were aware of CSA and 46% were aware of box programs or CSA in 2016. From 2012 to 2016, the survey scale was changed from a five-point scale (degree of knowledge) to a dichotomous scale (aware/unaware), making direct comparison difficult. In 2012, 34% of respondents knew “a lot, something or a little” about CSA/box programs, as compared to 46% to 47% in 2016, indicating that awareness has grown.

As expected, and observed in previous years, individuals purchasing products through a channel have higher average familiarity scores for that channel (Graph 2). Thus, those households that purchased at farmers' markets had familiarity scores of 4.40 compared to those that did not, with scores of 3.81. The gap in familiarity, however, has lessened between the two groups from 2012 when it was 0.85 to 0.59 in 2016, meaning that even those that did not purchasefrom farmers' markets felt they were familiar with them.

Households' familiarity with farm retail showed an increase since 2012. The average familiarity rating for purchasers increased 0.25 and for non-purchasers the increase was 0.14. As in previous years, overall familiarity scores were lower for farm retail than farmers' markets.



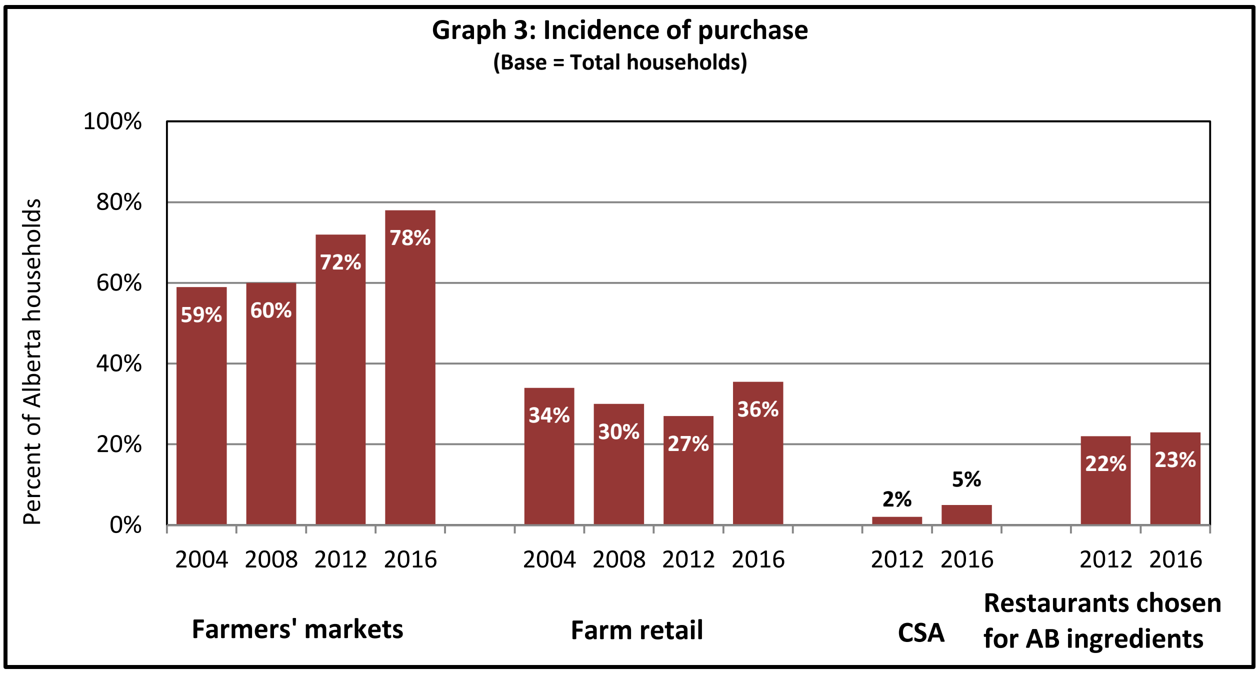
Source: QFM1 (n=1,200), QFR1 (n=1,196)
Note: No CSA data was gathered in the 2016 survey.

2.2 Current and Projected Market Size

2.2.1 Current (Incidence)

Among the three markets explored, farmers' markets continue to be the most highly used market channel. The majority (78%) of respondents had made at least one purchase at a farmers' market in 2016; up from 72% of respondents in 2012. However, although fewer people used the farm retail channel, as compared to farmer's markets, overall, it saw the greatest increase in utilization across the four years. Thus, in 2016 there was a 9% increase in the percentage of respondents who had purchased from the farm retail channel as compared to 2012.

The CSA/box programs channel (3%) and restaurants serving local foods or ingredients (1%) only made small gains in utilization from 2012. Overall, 5% of households purchased from CSA/box programs and 23% of households chose to eat in restaurants that served food made from ingredients grown or made in Alberta. In comparison, 83% of respondents had eaten in a restaurant (non-specific) in the last 12 months.

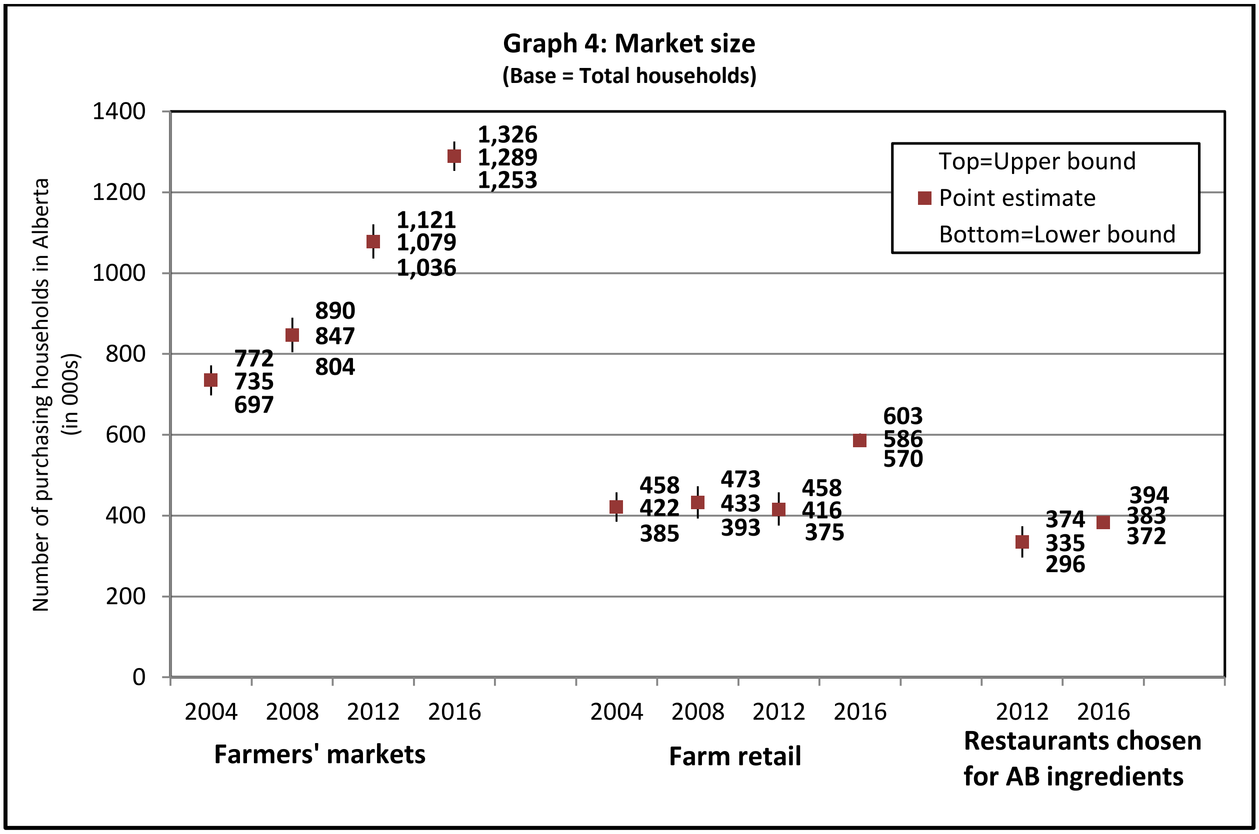


Source: FM2 (n=1,200), FR2 (n=1,200), CSA2 (n=1,200), CSA2 (n=1,200) and R4 (n=1,200).
Note: 2016 percentage of "Don't Know" responses for Farmers' markets (2%), Farm retail (<1%), CSA (1%), Restaurants for AB ingredients (2%)

2.2.2 Overall market size

When projected to the population of Alberta (based on Canada Post statistics for "total residential points of call") an estimated 1.289 million households purchased from farmers' markets, 586,000 households purchased from farm retail and 383,000 households purchased from Alberta restaurants serving locally-grown or made ingredients. Importantly, all channels saw increased utilization across the four-year period, with farm retail experiencing the greatest proportional gains (41%) as compared to all other channels over that time period. Thus, in 2016, 170,000 more households are estimated to have purchased from this channel. Farmers' markets in contrast made less of a proportional gain (19%) in the proportion of households that purchased from this channel, up from 1.079 million households in 2012 to 1.289 million households in 2016. Restaurants serving locally-sourced ingredients saw an additional 48,000 households accessing this channel in 2016.

Graph 4 provides the best estimate alongside the upper and lower bounds of the confidence interval for that estimate based on sample error. The actual number of households that purchased from a channel can be anywhere in between the upper and lower boundaries provided.



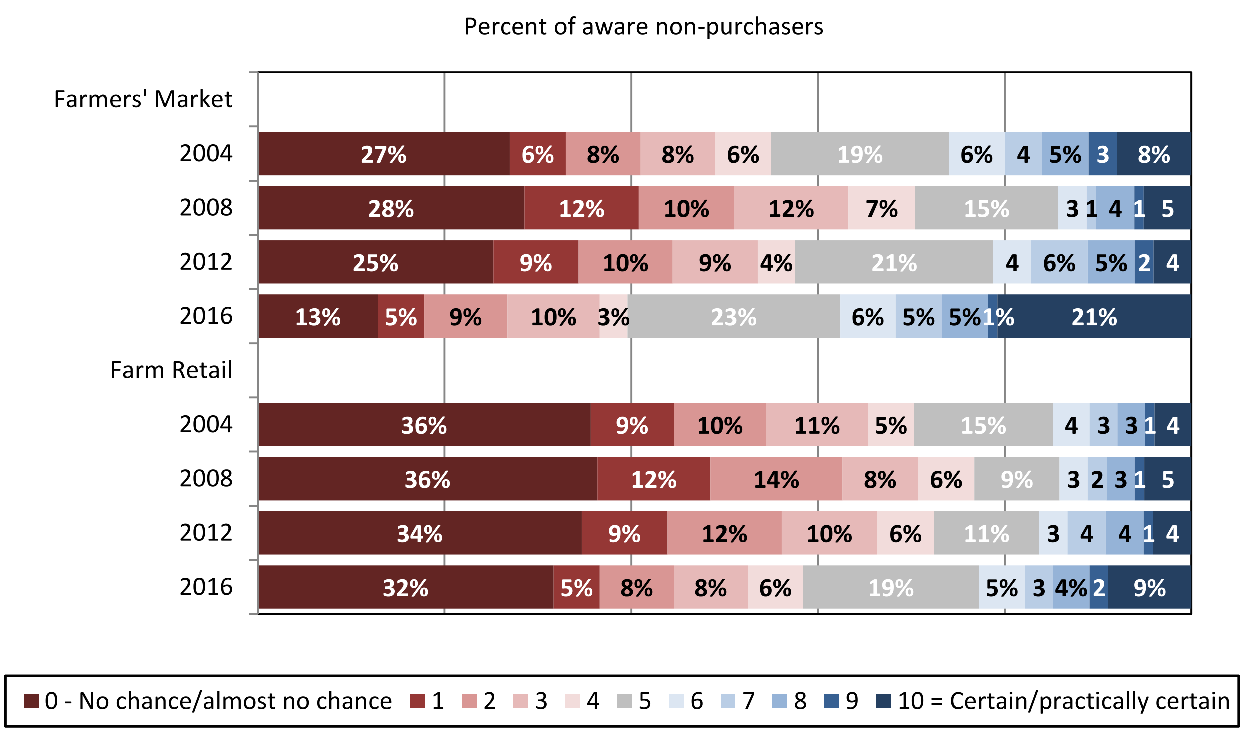
Data from Graph 3 x Total Alberta households (1,651,051)

2.2.3 Projected Market Growth

Respondents who had not purchased from a local market channel such as farmers' market or farm retail were asked if they were likely to purchase from that channel in the next 12 months using a zero to 10 scale, where zero is no chance or almost no chance, and 10 is certain or practically certain. To maintain comparison with previous studies, respondents rating their likelihood at six or higher were considered to be purchasers for the upcoming year.

As shown in Graph 5 the chances of non-purchasers buying food products from farmers' markets made significant gains in 2016 as compared to 2012 and all previous years. Thus, in 2016, 80% of all survey respondents indicated they would purchase from a farmers' market, while 38% of non-purchasers believed that they would buy from the farmers' market channel in the next 12 months; a higher proportion than the 21% who indicated they were interested in 2012. Similarly, 41% of total respondents and 23% non-purchasers believed that they would purchase from the farm retail channel in the next 12 months, compared to only 16% of non-purchasers in 2012.

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



Source FM10 (n=241), FR15 (n=490)
Note: 2016 percentage of "Prefer not to Answer" responses for Farmers' market (1%), and Farm retail (1%)

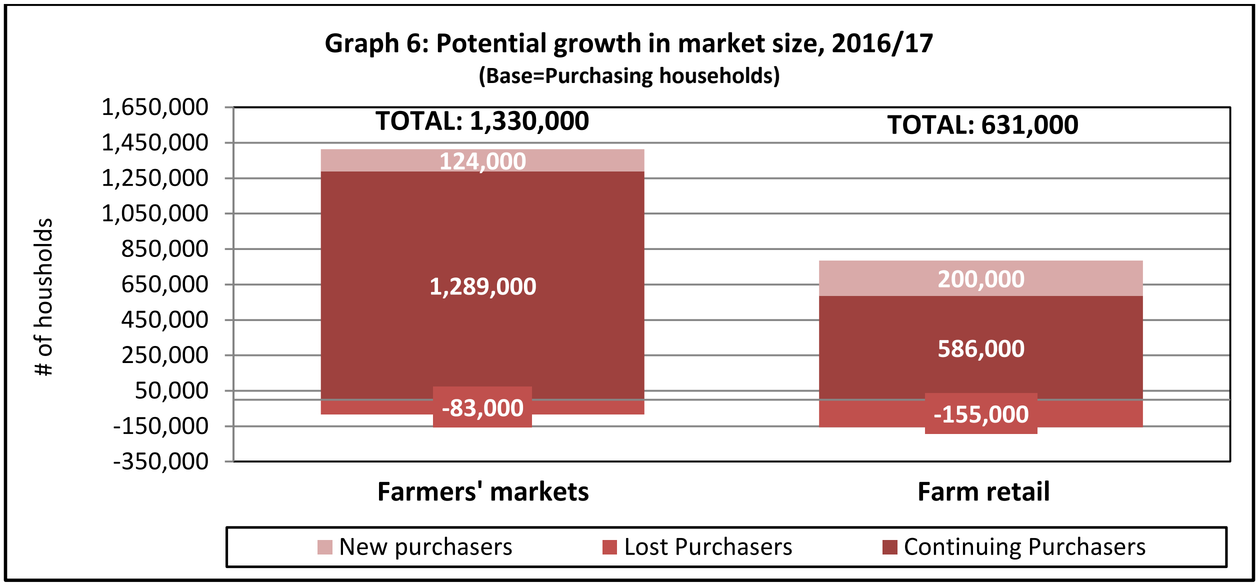
Extrapolating projected growth to market size shows that the projected market size in 12 months for farmers' markets and farm retail is 1.330 million and 0.631 million households respectively; which is a growth rate of 3% for farmers' markets and 8% for farm retail (See Table 3). Table 3 converts the proportion of the population likely to become purchasers to the total of new households that could enter the market in the next 12 months, along with the projected growth rate. Also provided are the number of households that will no longer continue to purchase in the upcoming 12 months, and the number that did purchase in the past 12 months. Both numbers are used to calculate the projected number of new households that will be purchasing in the next 12 months. It is important to note that the number of new households takes into account the number of households entering and leaving the channel, in contrast to Graph 5 which only displays the number of current non-purchasers who estimate they will be entering the channel. When those leaving the channel are considered, the gains in households overall are much smaller.

Table 3: Projected growth in market size (number of purchasing households) in the next year*

	2016 Estimate (000)	Confidence Interval 2016	
		Lower bound (000)	Upper bound (000)
Farmers' markets			
# of new households interested in purchasing in the next 12 months	124	120	127
# of households that purchased in the past 12 months	1,289	1,253	1,326
# purchasing households that will not continue to do so	-83	-81	-85
PROJECTED MARKET SIZE IN 12 MONTHS	**1,330**	**1,292**	**1,368**
Projected rate of growth in the next 12 months %*	3%	3%	3%
Farm retail			
# of new households interested in purchasing in the next 12 months	200	194	206
# of households that purchased in the past 12 months	586	570	603
# purchasing households that will not continue to do so	-155	-150	-160
PROJECTED MARKET SIZE IN 12 MONTHS	**631**	**614**	**649**
Projected rate of growth in the next 12 months %*	8%	8%	8%

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

The overall market for 2016/2017, including current, new and lost purchasers, is shown in Graph 6. Thus it is estimated, based on 2016 purchases that 1.330 million households in Alberta will purchase from farmers' markets, and 0.631 million households will purchase from farm retail. The gain in market size for farm retail and farmers' markets is almost offset by the loss of former purchasers; the net gain being 45,000 and 41,000 respectively. Based on 1,651,051 households in Alberta, 81% are expected to purchase from farmers' markets in the next 12 months, and this channel is expected to become saturated in the future. There is, however, significant opportunity to expand purchasers in the farm retail channel.



Data from Table 4. Note: numbers may not add up due to rounding.

2.3 Market Value

The value of each market channel was estimated utilizing three data points from survey respondents' data:

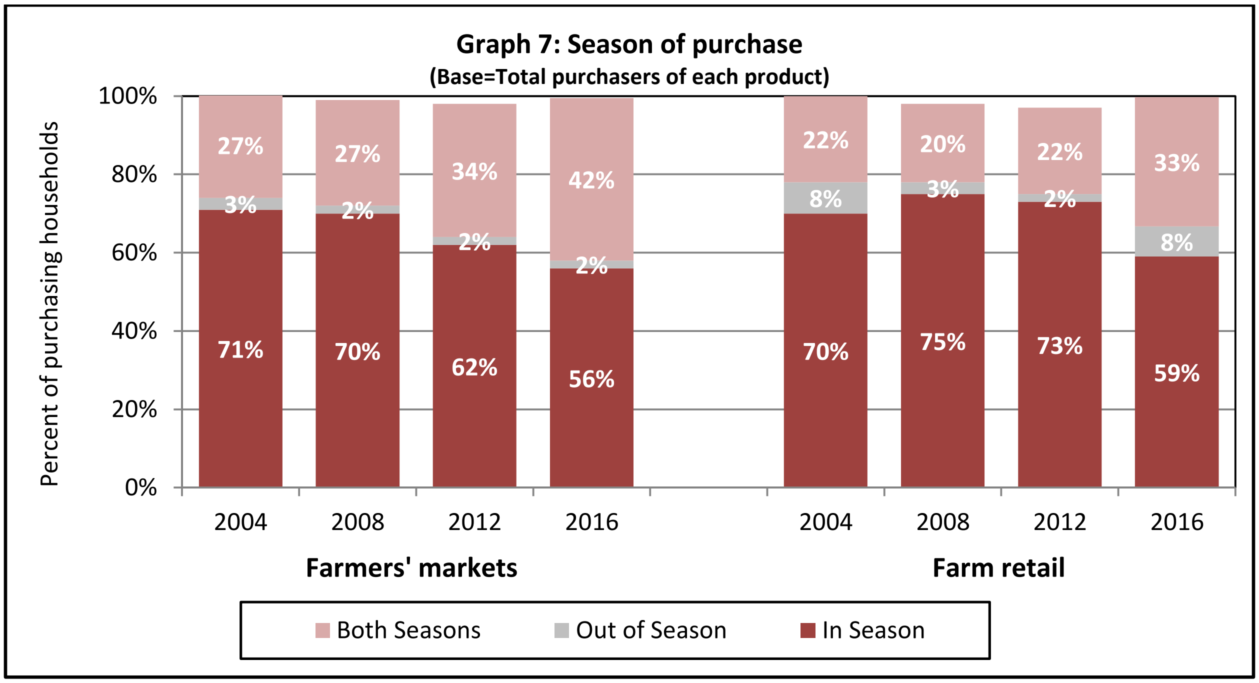
- **Season of purchase**: seasons were defined as "in-season," running from June to October, and "out-of-season," running from November to May. Please note that in 2016, summer was redefined as "in-season," while winter was defined as "out-of-season." Additionally, the renaming and re-grouping of the seasons means that "out-of-season" in 2016 is one month longer than "winter" in 2012, and "in-season" is one month longer than "summer."
- **Number of purchases made per season**: respondents were asked to provide the number of purchases made in each seasonal period.
- **Expenditure on the last seasonal visit**: two expenditure data points were obtained from each respondent; total spending at the channel during the last visit and total spending on local food at the same channel.

Findings from each of the aforementioned data are discussed first, followed by a discussion of the estimated spending (market value) based on estimates derived for the three data points.

2.3.1 Seasonality

As shown in Graph 7, just over half of the total purchases made by channel in the preceding year occurred in the summer season only; with 56% of purchases occurring at farmers' markets and 59% of purchases occurring at farm retail. The reduction of the proportion of in-season purchases from 2012 to 2016 for both farmers' markets and farm retail may have resulted from the averaging of the fall and winter season into a single category of "out of season".

A growing proportion of purchases, however, occurred year round for both channels. Thus year round, there was an 8% increase in households that purchased through the farmers' market channel (42% - 2016), and a 11% increase in purchasers in the farm retail channel (33% - 2016). Further, there was a 6% increase of households that purchased from farm retail during the out-of-season period. Again, the change in proportions may be impacted by the change of season categories from fall and winter into a single out-of-season category.



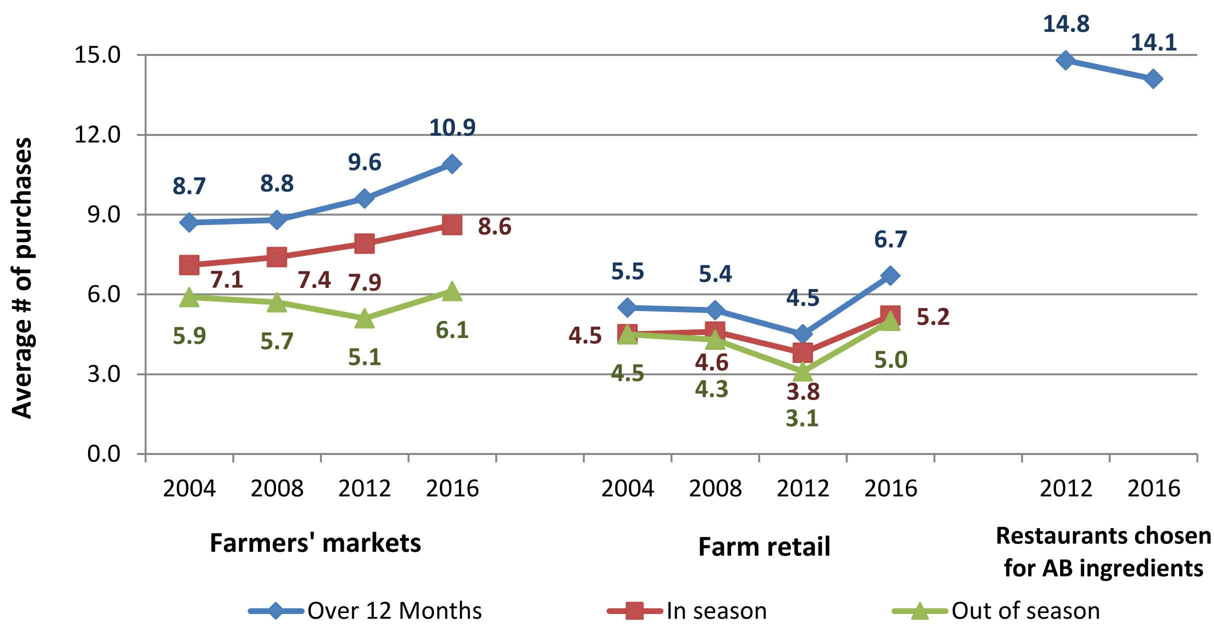
Source FM4 (n=921), FR3 (n=408)
Note: 2016 percentage of "Don't Know" responses for Farmers' Market (1%) and Farm retail (2%).
Previous survey used Fall (Sep to Oct), Summer (May to Aug), Winter (Nov to April). 2016 survey used "In-season" (Jun to Oct) and "Out-of-season" (Nov to May).

2.3.2 Frequency of Purchase

The average number of visits made to farmers' markets, farm retail, and restaurants serving Alberta ingredients are shown in Graph 8. The averages were calculated by taking the number of visits in a season, either for in-season period, out-of-season or in 12 months.

As in 2012, Alberta households were more frequently visiting restaurants that served local ingredients than either farmers' markets or farm retail. At an average of 5.2 visits during in-season, farm retail has the lowest rate of visitation, followed by farmers' markets which were visited, on average, 8.6 times by households during the in-season. Out-of-season visitation was lowest to farm retail with an average of 5.0 visits during the season. Annually, households visited farmers' markets 10.9 times and farm retail 6.7 times. Restaurants chosen for Alberta ingredients saw a slight decline in visitation from an average of 14.8 in 2012 to 14.1 in 2016.

Graph 8: Average number of purchases by season and for the year
(Base = Total purchasers of each product in each season)



Source: FM5A, FM6A (n=920, 894, 393), FR4, FR7 (n=405, 367, 163), R5 (n=278).
Note: Outliers removed from analysis.
Previous survey used Fall (Sep to Oct), Summer (May to Aug), Winter (Nov to April). 2016 survey used "In-season" (Jun to Oct) and "Out-of-season" (Nov to May).

The estimated number of visits by season, in millions, is shown in Table 4. As shown in Table 4, purchasing visits have steadily increased to farmers' markets across the years, with the highest rates of visitation occurring during the in-season period in 2016. Across each four-year interval, visits have consistently increased by approximately two million.

This is in contrast to farm retail where, visits declined sharply in 2012, returning and surpassing previous levels in 2016. Thus, 2016 saw a 2.06 million increase in visits to the farm retail channel.

Restaurants serving local ingredients have also shown an increase in visits in 2016, climbing 440,000 from 2012.

Table 4: Estimated number of purchasing visits by season over a 12 month period

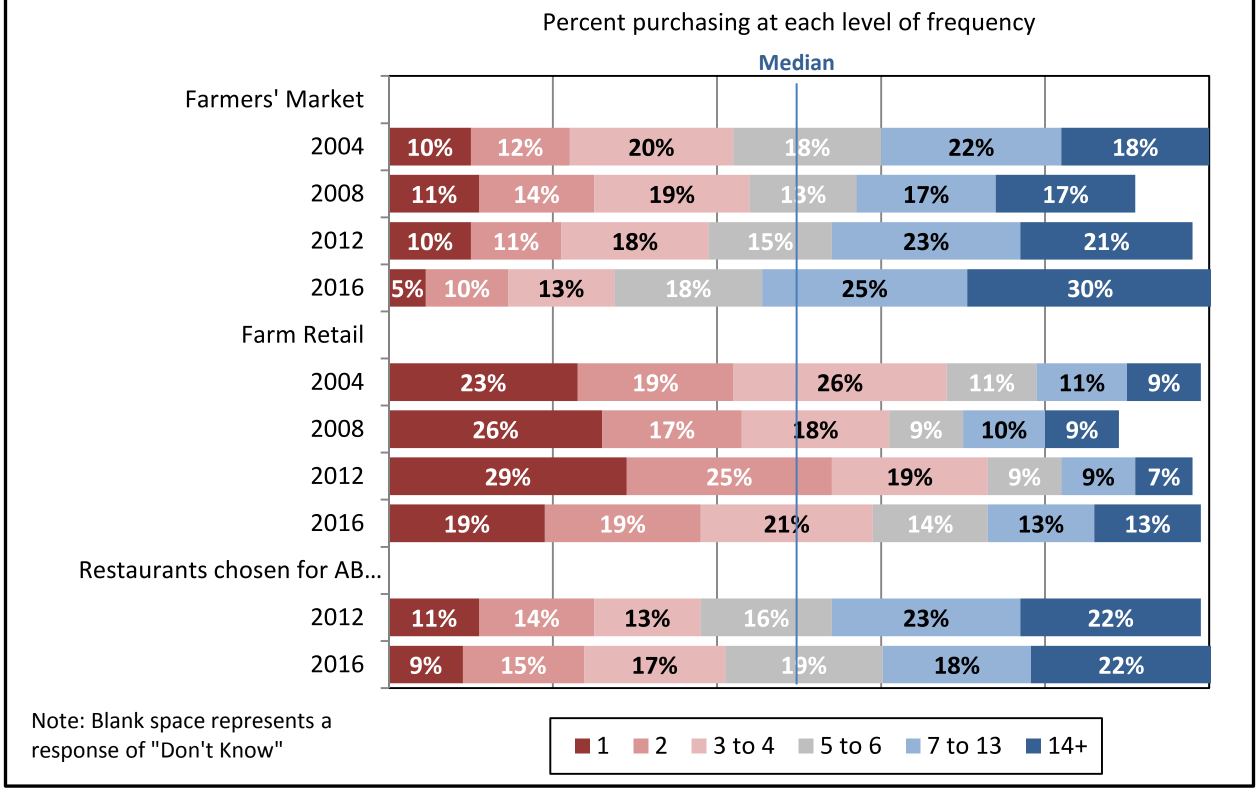
	Estimate				Confidence Interval 2016	
	2004	2008	2012	2016		
	Visits (million)	Visits (million)	Visits (million)	Visits (million)	Lower bound (million)	Upper bound (million)
Farmers' markets						
In-season (n=569/539/719/894)*	5.12	6.08	8.18	10.69	10.36	11.01
Out-of-season (n=173/143/266/393)	1.29	1.40	1.98	3.38	3.21	3.54
Full Year (n=583/533/734/920)	6.38	7.43	10.33	14.06	13.64	14.48
Farm retail						
In-season (n=312/268/270/367)*	1.76	1.89	1.51	2.67	2.53	2.80
Out-of-season (n=101/57/57/163)	.56	.43	.32	1.15	1.06	1.24
Full Year (n=339/270/277/405)	2.33	2.32	1.86	3.92	3.72	4.10
Restaurants chosen for Alberta ingredients						
Full Year (n=-/-/231/278)	--	--	4.96	5.40	5.09	5.71

*Bases are for 2004, 2008, 2012 and 2016 respectively
Note: Seasonal figures may not add to exactly the same number as annual figures. Figures may not add due to rounding. Previous survey used Fall (Sep to Oct), Summer (May to Aug), Winter (Nov to April). 2016 survey used "In-season" (Jun to Oct) and "Out-of-season" (Nov to May).

Many of the households that purchased at farmers' markets were frequent purchasers (Graph 9). Thus, 54% of households that frequented this channel purchased products 7 or more times in the past 12 months. Conversely, 7 or more visits were made less frequently to farm retail (27% of households) and restaurants serving local ingredients (40% of households).

Visitation was, however, up across all three channels, with a higher proportion of households in 2016 reporting that they purchased from the channel 14 or more times as compared to 2012. Overall, proportion of those who purchased 14 or more times in a year has increased 9% for farmers' markets, 8% for farm retail and remained the same for restaurants chosen for Alberta ingredients (22%).

Graph 9: Number of purchases made in the past 12 months
(Base = Total purchasers of each product)



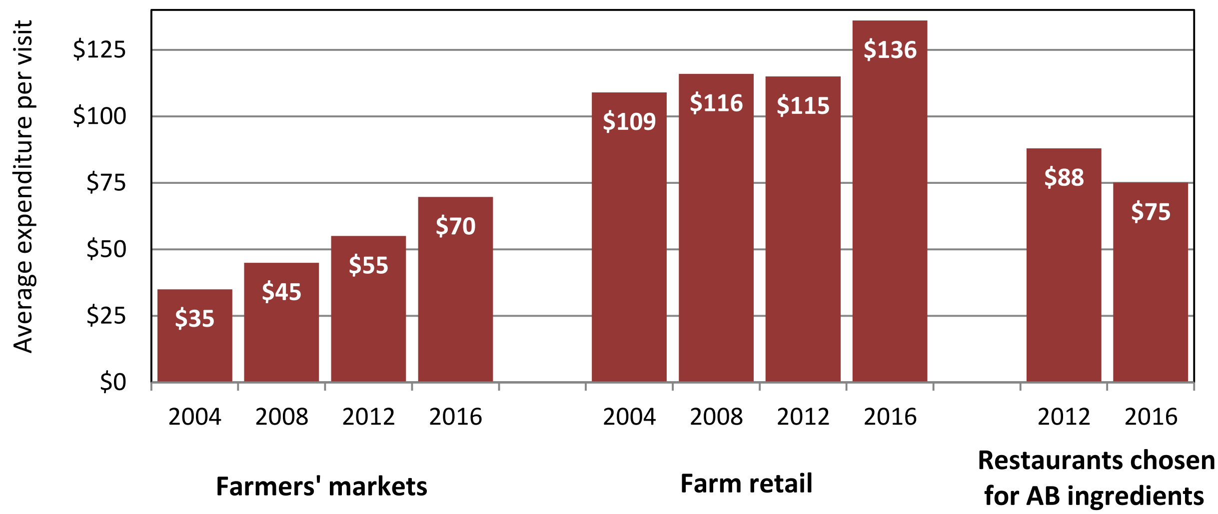
Source: QFM5a, QFM6a (n=920), QFR4, QFR7 (n=405), QR5 (n=278)

2.3.3 Per Visit Expenditures

Spending by purchasing households continued to climb in 2016 at farmers' markets, as well as farm retail. In 2016, households spent, on average, $70 dollars on their last to the farmers' markets; up $15 dollars per visit from 2012. Per visit expenditures at farm retail also increased $21 from $115 in 2012 to $136 in 2016.

Conversely, spending at restaurants that serve local food declined in 2016. Households spent $13 dollars less, on average, at this channel in 2016 compared to 2012. The decline in spending for restaurants paralleled a similar decline in grocery retail spending (3.3% sales decline) that occurred in Alberta in 2016.

Graph 10: Average expenditure per visit in this past year
(Base = Total purchasers in each channel)



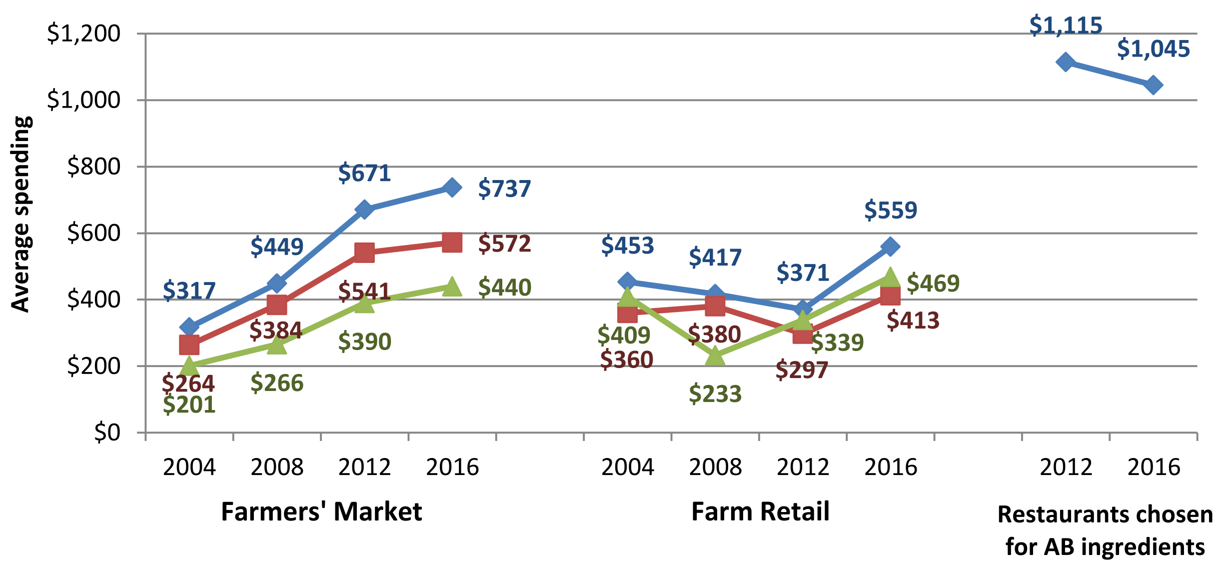
Source: QFM5A, QFM5BI, QFM6A, QFM6BI (n=921), QFR4, QFR5, QFR7, QFR8 (n=408), QR6 (n=279)

2.3.4 Annual Household Expenditures

By season, and over 12 months, the average total expenditures of purchasing households are displayed in Graph 11. In 2016, households were spending more, annually, in two of the three channels: farmers' markets ($737), farm retail ($559). Restaurants that serve local ingredients saw a slight decline in average total expenditures ($1,045). Further, the increase in annual spending in farmers' markets and farm retail were the highest across any survey wave since surveying began in 2004.

Average expenditures increased for farm retail and farmers' markets, which can be attributed to both increased average spending per visit and more visits per household. For restaurants, the decrease in annual spending is expected as average number of visits and average amount spent per visit declined slightly for this channel.

Graph 11: Average household expenditures by season and for the year
(Base = Total purchasers of each product in each season)

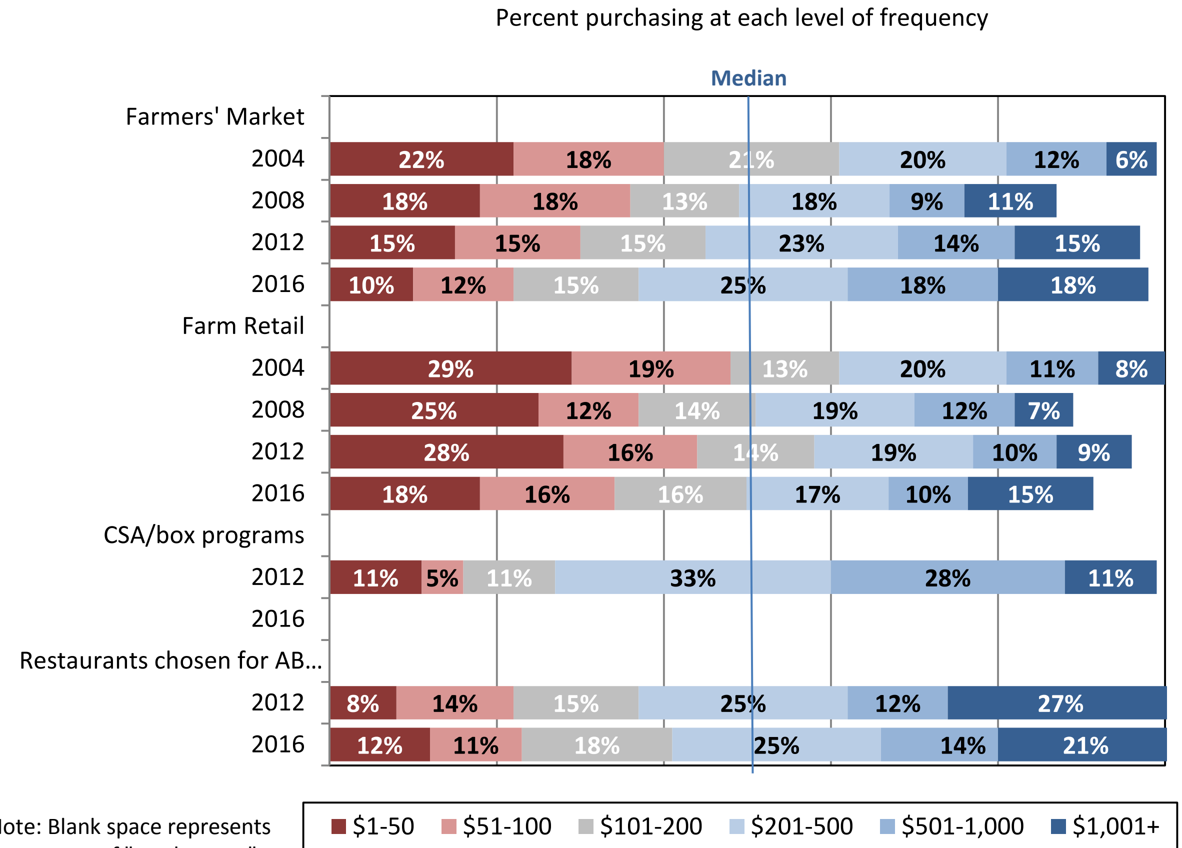


* 2008 winter estimate for farm retail may not be reliable due to small sample base

Source: Average expenditures for the season;
Farmers' Market FM5bi, FM6bi (Out-of-season n=386, In-season n=878, Over 12 Months n=912)
Farm Retail FR5, FR8 (Out-of-season n=156, In-season n-357, Over 12 Months n=394)
Restaurants chosen for AB ingredients R3 (Over 12 Months n=275)
Note: No CSA expenditure data was gathered in the 2016 survey.
Previous survey used Fall (Sep to Oct), Summer (May to Aug), Winter (Nov to April). 2016 survey used "In-season" (Jun to Oct) and "Out-of-season" (Nov to May).

Looking at the wide variation in spending across households shows that households were spending slightly more annually in the ranges of $201 - $500 and higher for farmers' markets. For farm retail, there was increase in spending of $1,001 or more (Graph 12) compared to previous years. The majority of respondents who visited restaurants chosen for Alberta ingredients spent between $201 and $500. This result is comparable to 2012 survey results. In 2016 fewer households were spending $51 to $100 dollars or more than $1,000 annually in this channel. Given that households were only slightly more likely to visit these restaurants in 2016 (6%), and spent less on average per visit, the decline in higher end annual spending ($1,001+) is an expected finding.

Graph 12: Distribution of expenditures made in the past 12 months
(Base = Total purchasers of each product)



Note: Blank space represents a response of "Don't Know"

Source: QFM5ai, FM6bi (n=938), QFR8bi, QFR9bi (n=426), QR6 (n=275)
Note: 2016 percentage of "Don't Know" for Farmers' market (3%), Farm retail (8%)
Note: No CSA expenditure data was gathered in the 2016 survey.

2.3.5 Current Market Value

Current market value was estimated using the number of respondents who reported valid purchasing amounts, the number of times these individuals purchased from each channel during each season and how much these households spent on the last purchase they made at the channel. An annual expenditure was developed for each respondent, and only then projected to the population of Alberta households.

The estimated value of the three channels is given in Table 5. By in-season both farmers' markets and farm retail had the highest market value of $690.6 million and $203.0 million respectively. In-season, farm retail has increased in market value from 2012 (when it declined) and 2008. Similarly, in-season market value of farmers' market experienced significant growth from 2012. Both the farm retail and farmers' market channels showed significant increases in market value in both in-season and out-of-season periods.

Table 5: Estimated market value by season over a 12 month period

	Estimate				Confidence Interval 2016	
	2004	2008	2012	2016		
	Value ($million)	Value ($million)	Value ($million)	Value ($million)	Lower bound ($million)	Upper bound ($million)
Farmers' markets						
In-season (n=569/539/719/878)*	$189.2	$315.2	$561.6	$690.6	$667.7	$713.5
Out-of-season (n=173/143/266/386)	$43.4	$65.5	$150.4	$233.9	$222.2	$245.6
Full Year (n=583/533/734/912)	$232.9	$380.2	$724.0	$924.5	$894.5	$954.5
Farm retail						
In-season (n=312/268/270/357)*	$139.4	$156.7	$$117.4	$203.0	$192.5	$213.5
Out-of-season (n=101/57/57/156)	$50.9	$23.2	$34.1	$100.7	$92.8	$108.6
Full Year (n=339/270/277/394)	$191.1	$180.7	$154.3	$303.7	$288.7	$318.6
Restaurants chosen for Alberta ingredients						
Full Year (n=-/-/231/275)	--	--	$373.9	$395.6	$372.2	$419.0

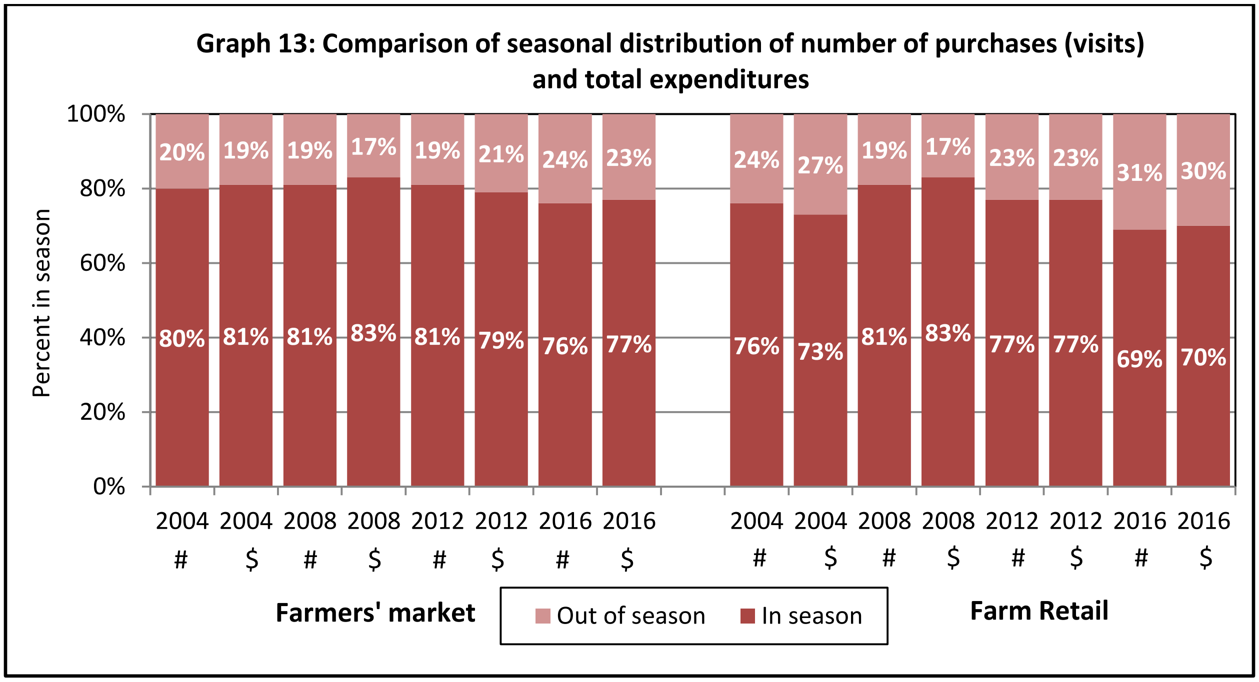
* Bases are for 2004, 2008, 2012 and 2016 respectively

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

2.3.6 Seasonal Distribution of Purchases and Expenditures

As in previous years, the majority of visits and purchases occur during the in-season period for both farmers' markets and farm retail (Graph 13).

The proportion of out-of-season purchases grew slightly from 2012 to 2016 for farmers' markets, while the proportion of out-of-season visits and expenditures has grown more substantially since 2008 for farm retail.



Source: FM5a, FM5bi, FM6a, FM6bi, FR4, FR5, FR7, FR8
Previous survey used Fall (Sep to Oct), Summer (May to Aug), Winter (Nov to April). 2016 survey used "In-season" (Jun to Oct) and "Out-of-season" (Nov to May).

2.3.7 Projected Market Value

To estimate the growth in market value over the next year data from existing purchasers was combined with estimated projected purchasing by new households and existing households.

Table 6 shows that the estimated growth in farmers' market value for 2017, based on 2016 data.

Farm retail similarly experienced an increase in total estimated value from 2008/2012 to 2016. The increase indicates that the farm retail channel has recovered from the downturn experienced in 2012, rebounding to market values higher than estimated in 2008.

Table 6: Estimated growth in market value in the next year

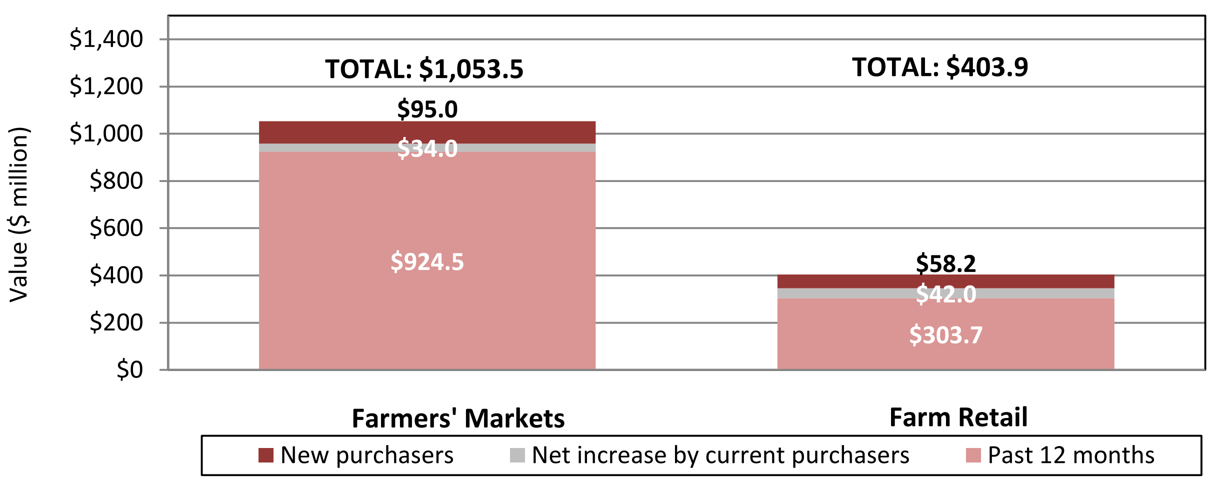
	Estimate ($million)				Confidence Interval 2016	
	2004	2008	2012	2016	Lower bound ($million)	Upper bound ($million)
Farmers' markets						
Value of purchases by new households interested in purchasing in the next year (n=94/50/61/89)*	$26.1	$22.6	$22.4	$95.0	$85.1	$104.9
Value of purchases in the past year (n=583/533/734/912	$232.9	$380.2	$724.0	$924.5	$887.9	$961.1
Change in value of purchases by current purchasers in next year (n=579/521/713/181)	$30.4	$87.0	$146.4	$34.0	$31.5	$36.5
PROJECTED MARKET VALUE IN 12 MONTHS	**$289.4**	**$489.9**	**$892.8**	**$1,053.5**	**$1023.5**	**$1083.5**
Projected rate of growth in the next 12 months %**	24.3%	28.8%	23.3%	14.0%	13.6%	14.4%
Farm retail						
Value of purchases by new households interested in purchasing in the next year (n=78/79/93/108)*	$52.3	$64.2	$65.5	$58.2	$52.7	$63.6
Value of purchases in the past year (n=339/270/277/394	$191.1	$180.7	$154.3	$303.7	$288.6	$318.8
Change in value of purchases by current purchasers in next year (n=333/273/278/315)	$25.5	$47.5	$39.7	$42.0	$39.7	$44.3
PROJECTED MARKET VALUE IN 12 MONTHS	**$268.9**	**$292.4**	**$259.5**	**$403.9**	**$390.0**	**$417.8**
Projected rate of growth in the next 12 months %**	40.7%	61.8%	68.2%	33.0%	31.9%	34.1%

* Bases are for 2004, 2008, 2012 and 2016 respectively

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

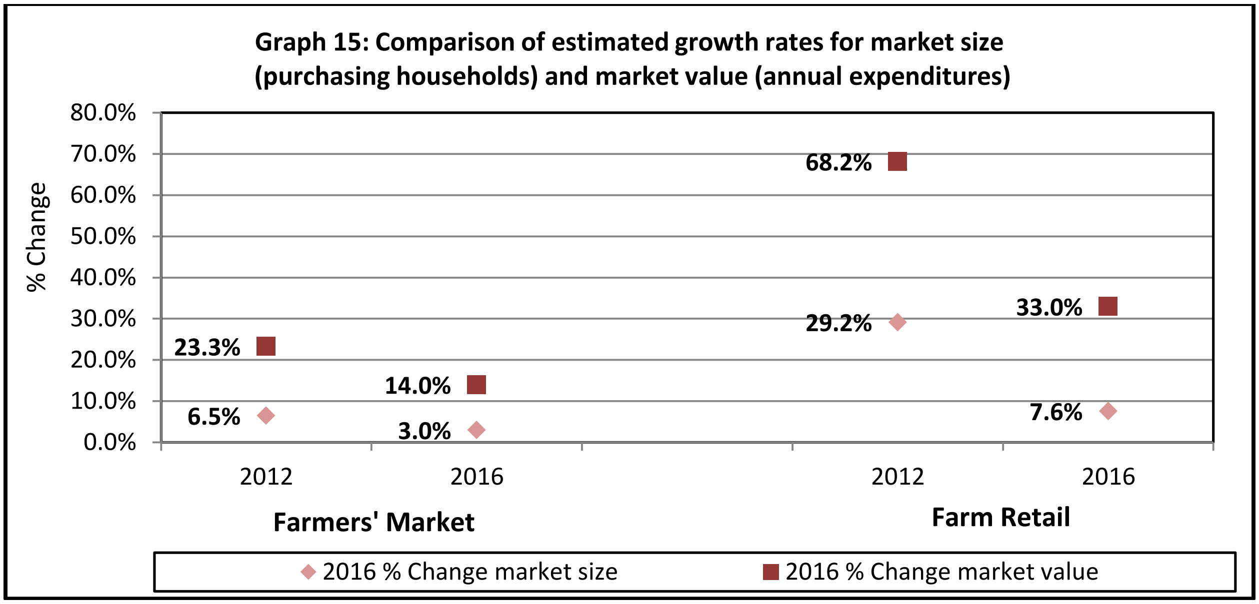
In the upcoming year, both new and existing households will contribute to the increased expenditures in the farmers' market and farm retail channels (Graph 14). Due to the increase in the proportion of non-purchasers indicating that they plan to purchase from farmers' markets and farm retail in the future compared to previous years (see graph 5), it is estimated that new purchasers will make a greater contribution to the spending increase than existing purchasers in both channels. This result is expected as new purchasers have a higher proportional impact when compared to existing purchasers. For example, a new purchaser that purchases $15 from a farmers' market has a higher proportional contribution than an existing purchaser who increased their purchases from $20 to $25 in the following year.

Graph 14: Potential growth in market value, 2016/17 ($ million)



Source: Data from Table 7

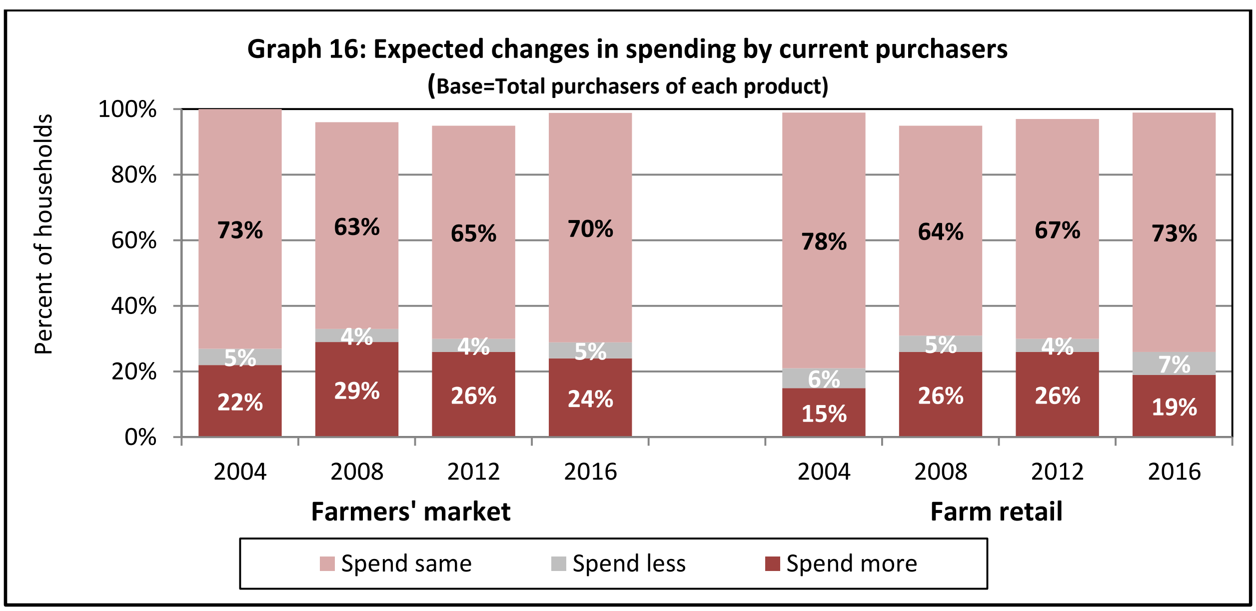
Graph 15 depicts the growth in market size and market value for farmers' markets and farm retail. Market size is the number of purchasers projected for the following year and market value is the total amount spent by all purchasers. As depicted in Graph 15, the growth rate of market size and market value are expected to decrease compared to 2012 estimates for both farmers' markets and farm retail.



Source: Data from Table 4 and Table 7.

In the survey, respondents were asked to estimate if their household would spend more, less or the same as last year at farmers' markets or farm retail. Once the direction of spending was established, the respondents were then asked to estimate the dollar amount of this spending. If they could not estimate it as a dollar amount, they were asked to report it as an increased percentage of spending. This line of questioning changed slightly from previous years, making it difficult to make direct comparisons to the other survey waves.

In 2016, existing purchasers generally estimated that they would spend the same on farmers' markets (70%) and farm retail (73%), showing a similar trend as in 2012. Graph 16 illustrates the proportion of survey respondents who indicated whether they would spend more, less or the same amount on purchases from farmers' markets and farm retail in the next 12 months.



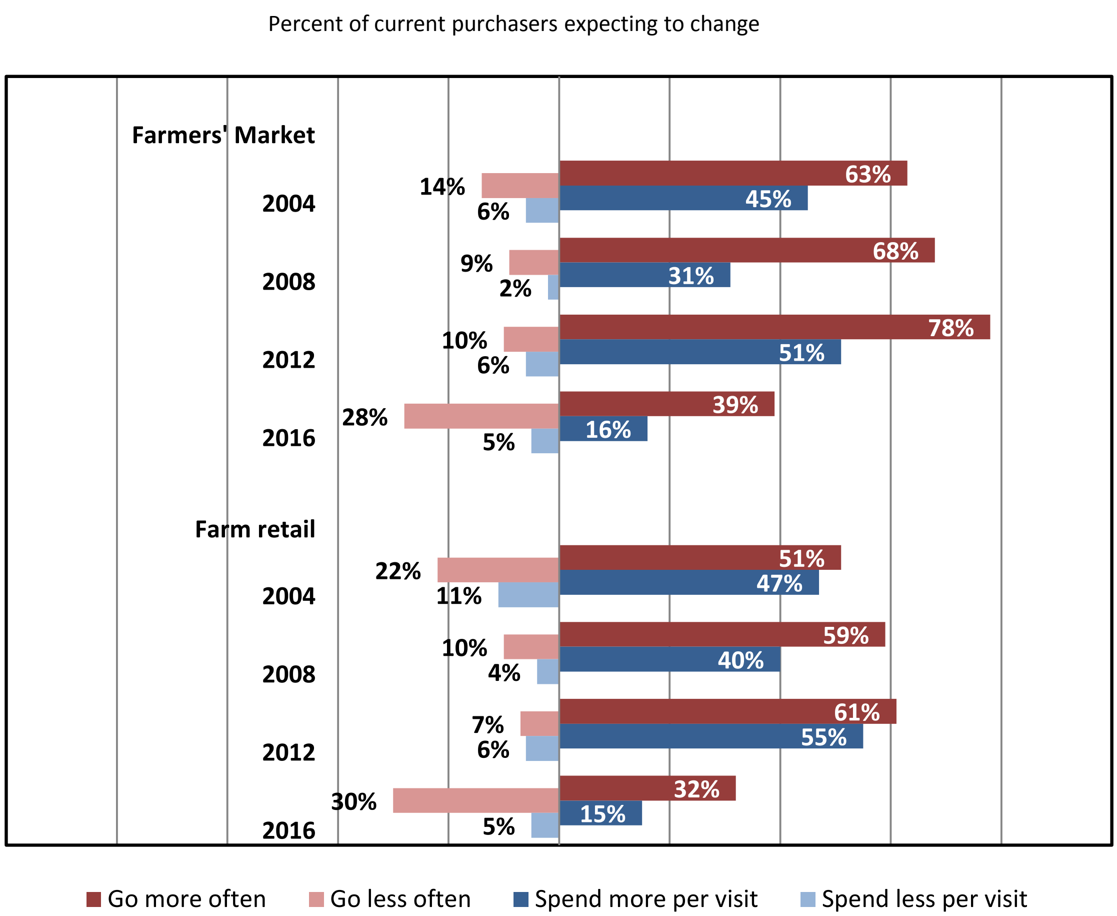
Source: QFM7 (n=921), QFR10 (n=408)
Note: 2016 percentage of Don't Know" responses; Farmers' market (4%), Farm retail 4 (%)

As compared to 2012, fewer purchasers were estimating that they will go more often in the next 12 months to either channel or spend more at those channels.

Taking into account the amount of money households estimated they would spend, either more or less per visit, in 2017 households were equally split between those that would go more often (32%) and those that would go less often (30%) to farm retail channels (Graph 17). When they believed they would go more often, some respondents (15%) felt they would spend more money per visit. Given that the number of anticipated visits estimated in 2016 is significantly lower than in 2012 it may be that households may already be visiting farm retail channels the maximum number of times annually.

For farmers' markets, households that purchased in 2016, more commonly believed that they would go more often (39%) in 2017 than go less (28%). Additionally, only 16% estimated that they would spend more per visit.

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



Source: FM8, FM9 (n=, 379), FR10, FR (n=408)

2.4 Market Profiles

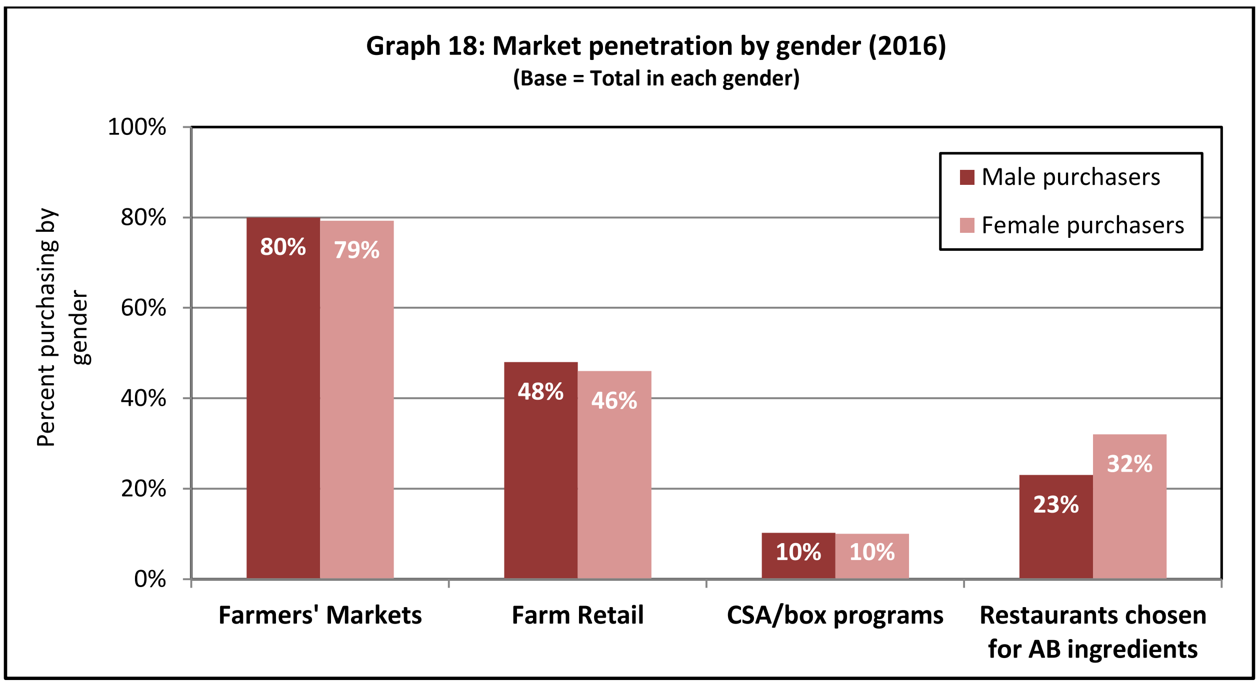
2.4.1 Demographic and Geographic Purchaser Profiles

For the purpose of the report, demographics have been divided into three categories for calculations and reporting. These include: gender, social characteristics, and economic characteristics.

Gender

By gender, both males and females equally reported purchasing at farmers' markets, farm retail and CSA/box programs. For restaurants serving local ingredients, however, women were 9% more likely to have purchased in 2016.

Across the four local food market channels, males and females were still equally likely to have purchased in 2016 at farmers' markets, farm retail and CSA/box programs. This finding reflects the fact that both genders, who responded to the survey, were commenting on the overall household purchasing behavior rather than their own purchasing behavior. Women were more likely to have frequented restaurants serving locally grown or prepared food (23% male; 32% female).



Source: QD8*QFM2 (n=1,178), QD8*QFR2 (n=916), QD8*QCSA2 (n=598), QD8*QR4 (n=977)
Prefer Not to Answer – Farmers' markets (<1%), Restaurants chosen for AB ingredients

Household Life Stage

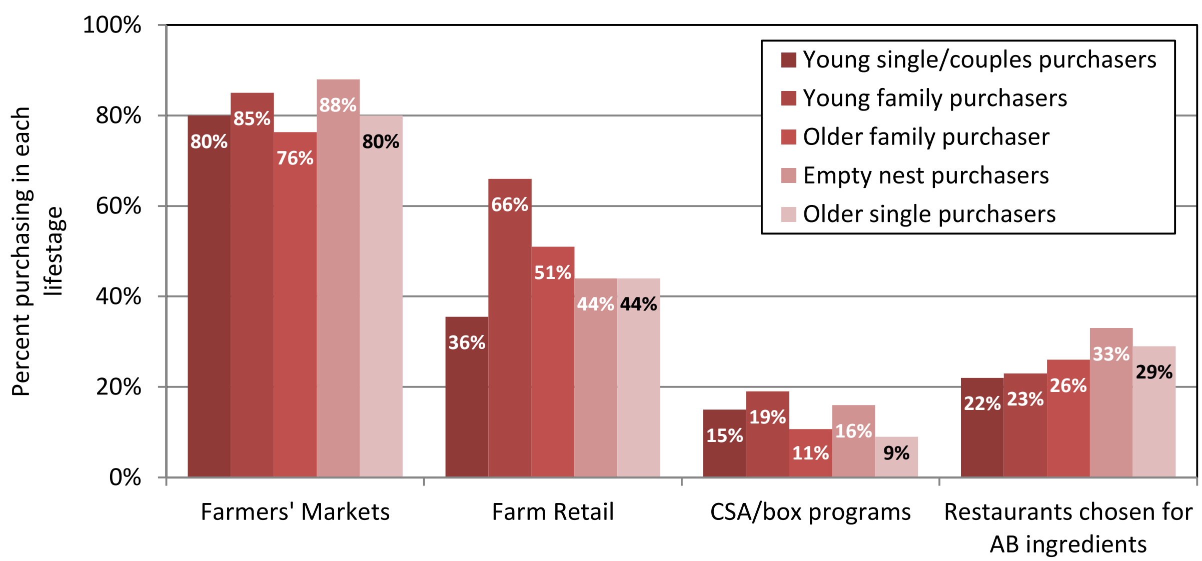
To develop household life stage, the survey variables of age, marital status, household size and presence of children, plus the age of the youngest child, were used.

By life stage, all households were more likely to have visited farmers' markets than any other local food market channel.

At the farm retail channel, purchases were most commonly made by young family purchasers (66%), followed by older family purchasers (51%). Young singles and couples were notably the least likely to have purchased from this market. CSA/box programs were again being utilized by young family purchasers (19%). Caution must be used when interpreting the findings for the CSA/box programs due to the small sample size and corresponding large margin of error.

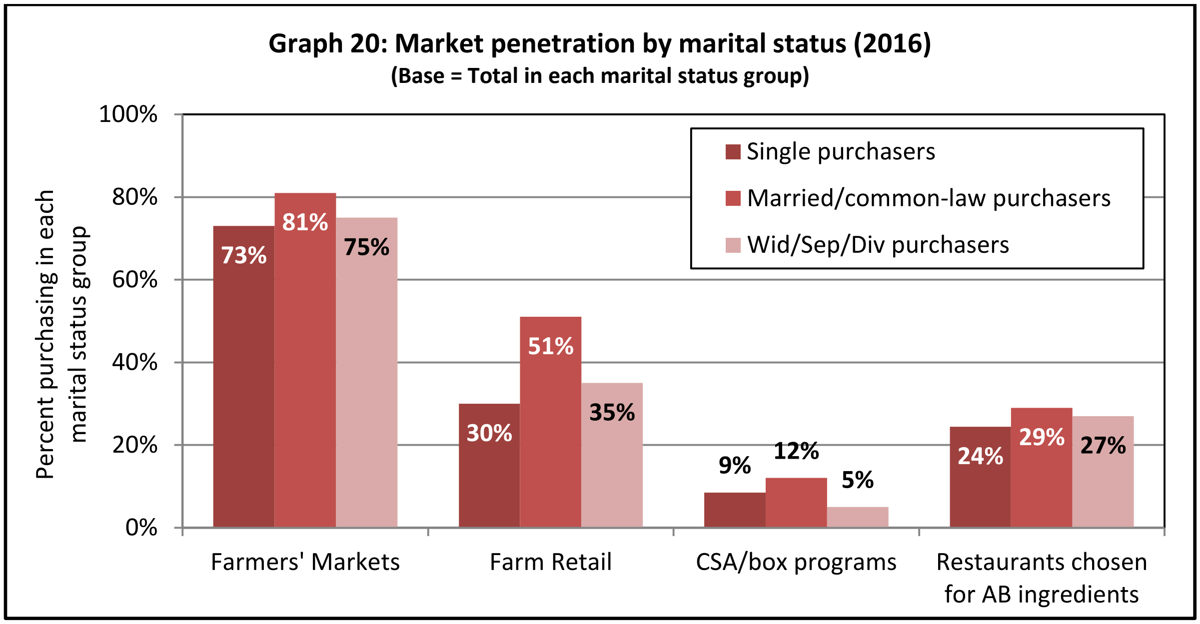
Empty nesters (33%) frequented restaurants serving local ingredients more often compared to all other groups.

Graph 19: Market penetration by household lifestage (2016)
(Base = Total in each lifestage group)



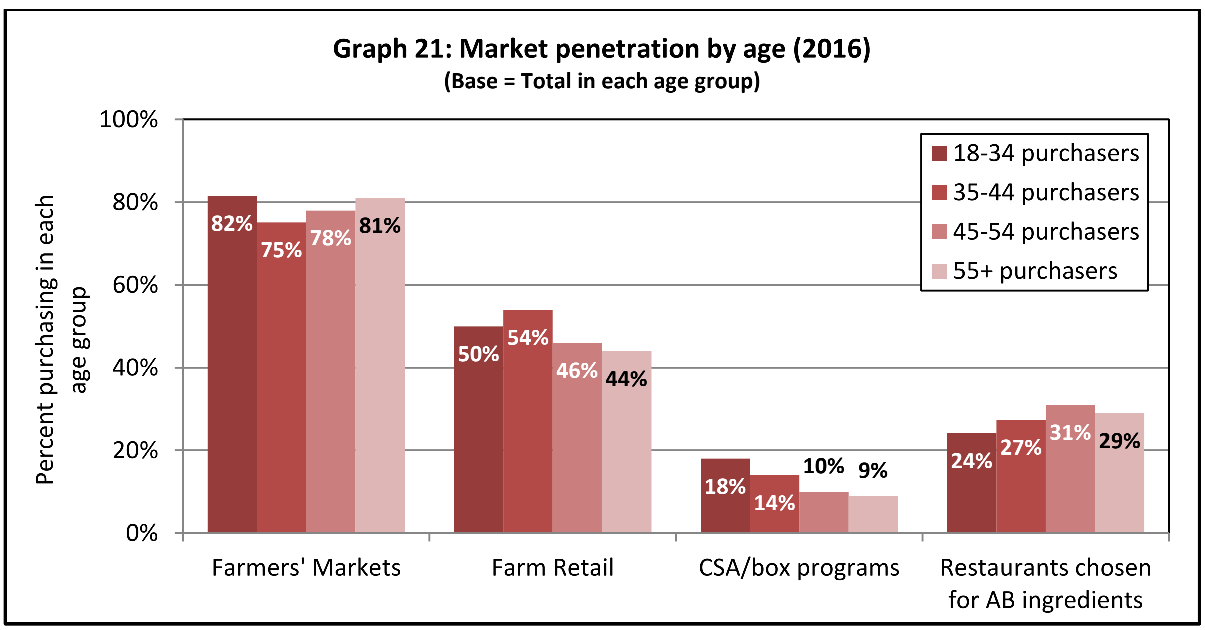
Source: FM2 (n=1141), FR2 (n=894), CSA2 (n=580), R4 (n=946)

Looking at the variables used in the household life stage calculation independently, households with married or common law purchasers were more likely to have purchased across all four channels, particularly from farm retail (+16% or greater) and farmers' markets (+6% or greater) (Graph 20).



Source: QD6*QFM2 (n=1155), QD6*QFR2 (n=899), QD6*QCSA2 (n=586), QD6*QR4 (n=956)

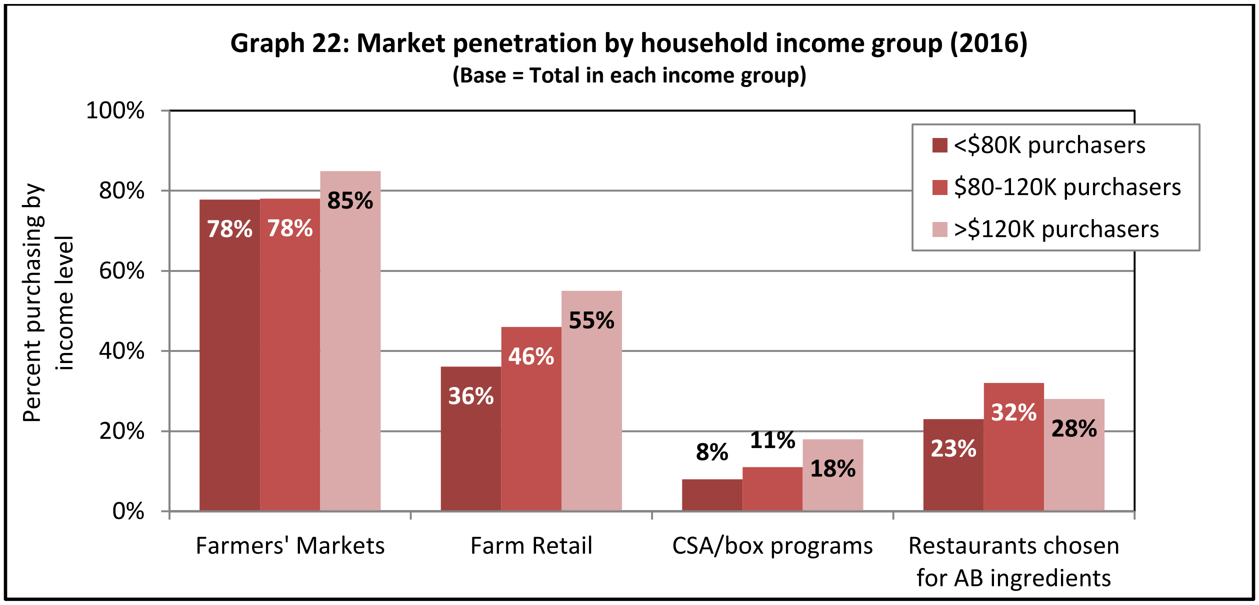
By age, those aged 55+ were least likely to have purchased from farm retail and CSA/box programs; while those aged 18 to 24 years were slightly more likely to have purchased at the farmers' markets and CSA/box program channels. Respondents aged 35 to 44 were more likely to purchase from farm retail compared to all other age categories (Graph 21).



Source: QD4*QFM2 (n=1,163), QD4*QFR2 (n=905), QD4*QCSA2 (n=589), QD4*QR4 (n=967)

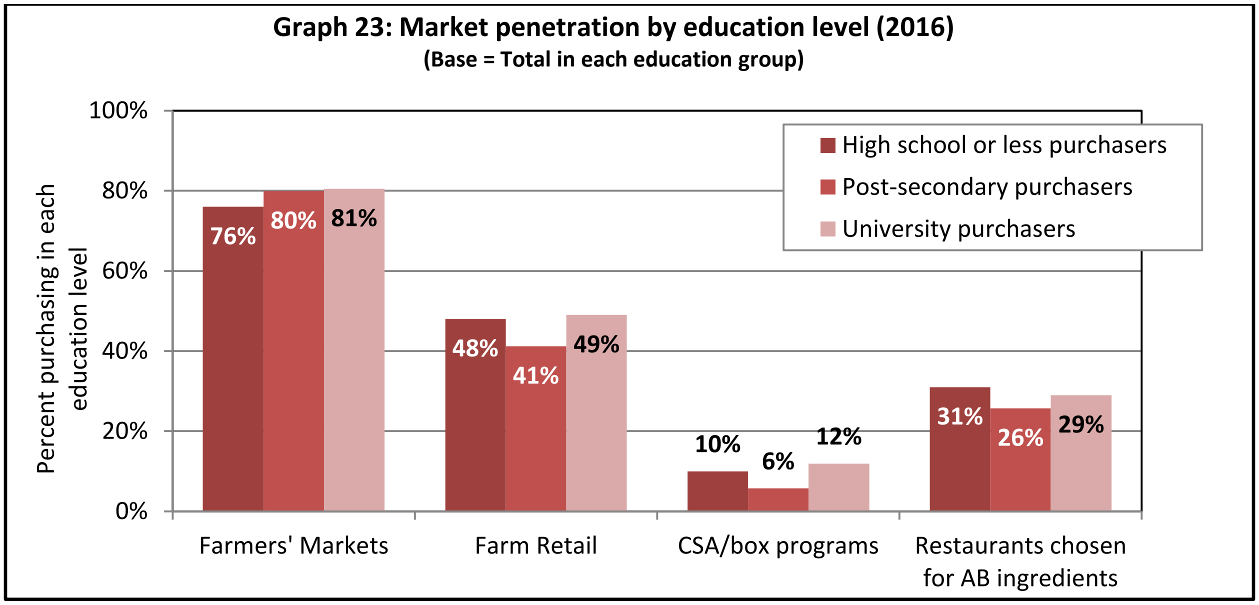
Economic Characteristics

Household income impacts purchasing patterns in all markets other than restaurants serving local ingredients (Graph 22). Households with an income of $120,000 or more were more likely to have purchased at farmers' markets (85% compared to 78%), farm retail (53% compared to 36%/46%) and CSA/box programs (18% compared to 8%/11%). Households with incomes of between $80,000 and $120,000 (32%) were more likely to have purchased at restaurants serving local food compared to those with incomes of less than $80,000 (23%) and incomes of $120,000 or more (28%). This may be directly related to the inclusion of family and fast food restaurants in the category.



Source: QD7*QFM2 (n=807), QD7*QFR2 (n=623), QD7*QCSA2 (n=405), QD7*QR4 (n=662)

Education level does not appear to impact purchasing patterns.

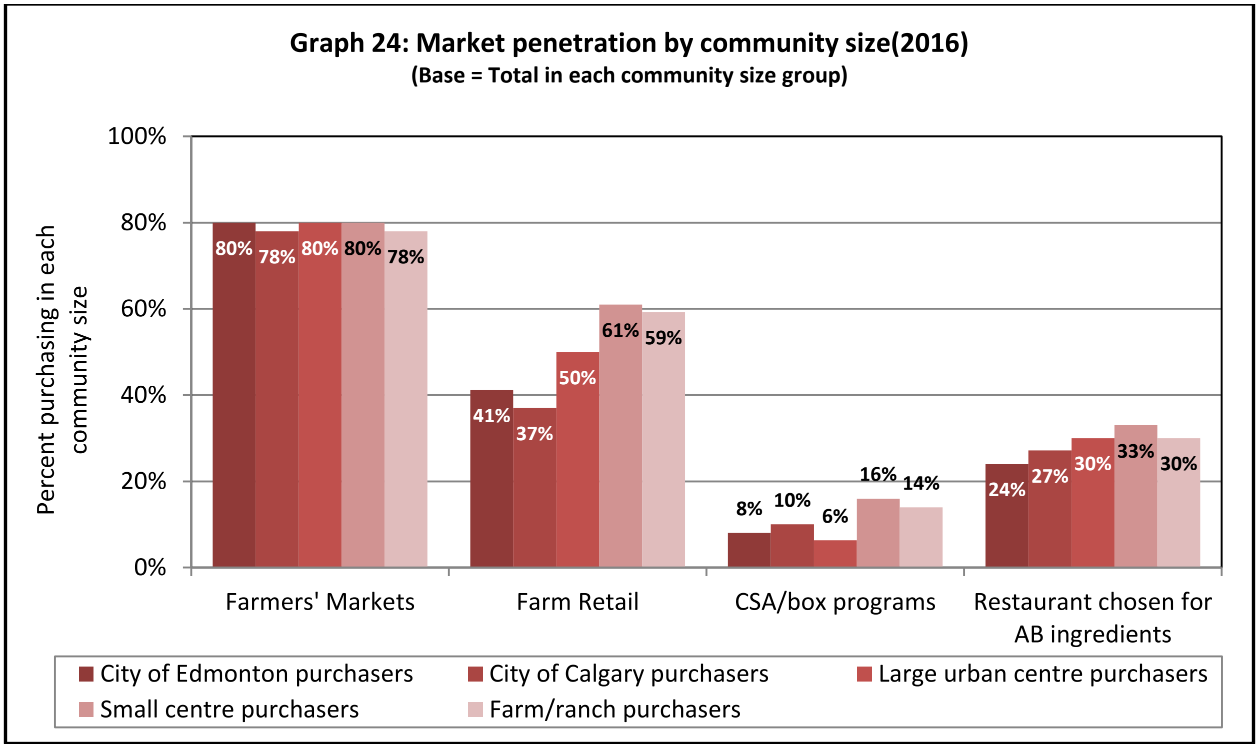


Source: D5*FM2 (n=1,163), D5*FR2 (n=906), D5*CSA2 (n=589), D5*R4 (n=966)

Geographic Location

Purchasing varied by community size and channel. A similar proportion of households located in large urban centers, Calgary, Edmonton, and small centres or farm/ranch areas purchased from farmers' markets and frequented restaurants serving local grown ingredients.

Market penetration for farm retail was greatest for small centre or farm/ranch purchasers; whereas households in Calgary and Edmonton were least likely to purchase from the channel. Similarly, small centre and farm/ranch purchasers more commonly used CSA/box programs.



Source: Region, QD3, QFM2 (n=1,180, 1178), QFR2 (n=917, 918), QCSA2 (n=601, 601), QR4 (n=977, 978)

2.4.2 Seasonal Profiles

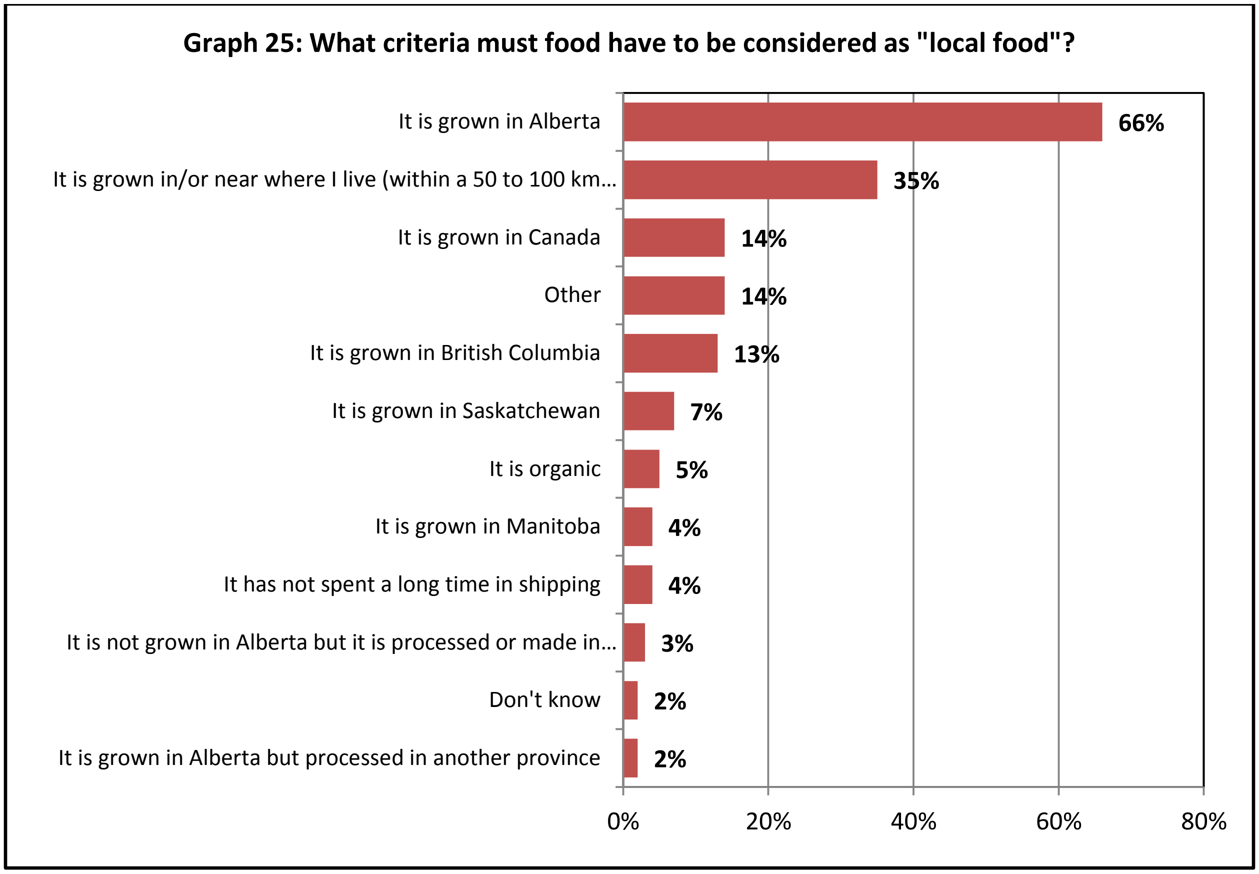
When examining the variables that correlate with spending at farmers' markets and farm retail both in-season" and "out-of-season" it was found that:

- Other urban centres were least likely to purchase at farmers' markets during both the in and out seasons (29% vs. 42% total) and most likely to shop only in the in-season (69% vs. 56% total) potentially reflecting the lack of year round venues in which to shop;
- Empty nesters are the most likely to shop in both seasons at the farmers' market (48% vs. 42% total), while older families and older singles most commonly shop during the in-season only (59% vs. 56% total);
- Calgary (37%) and rural (35%) regions are most likely to purchase in both the in and out-of-seasons at farm retail (29% Edmonton and 32% Other Urban);
- At farm retail, out-of-season purchases are more commonly made by young single/couples (20%) and young families (19%) compared to other lifestyle groups (8% total).

2.5 <u>Food Grown or Made in Alberta</u>

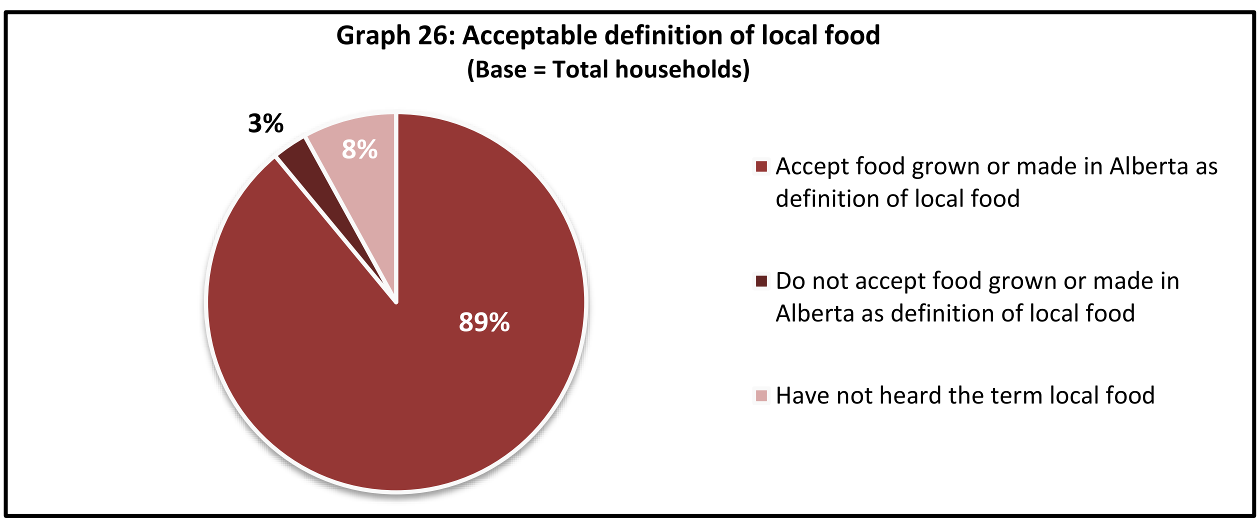
Unprompted, 92% of respondents had heard of the term local food. Thus, the term is well known in Alberta. Further, this is a 12% increase in awareness from 2012 when only 80% of respondents had heard of the term.

When asked what criteria must be met for food to be considered "local", respondents commonly mentioned it was where the food was grown (Graph 25). Thus, "food grown in Alberta" (66%) and "it is grown in/or near where I live" were commonly considered local. Few (5%) respondents suggested that local food was organic.



Source: AG3 (n=1,200)

For the purposes of the survey, local food was defined as food “grown or made in Alberta.” This definition was provided at the start of the survey, prior to collecting information on any of the channels. After hearing the definition, 96% considered food grown or made in Alberta as local food. The distribution for the population as a whole is shown in Graph 26. Out of the 92% of survey respondents who had heard of the term local food, 89% would accept food grown or made in Alberta as definition of local food.



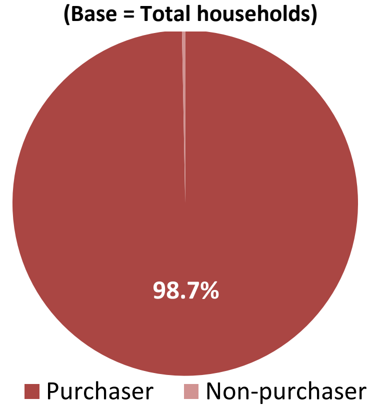
Source: AG1, AG7 (n=1,200)

For this section of the report, households were considered to be purchasers of local food if they purchased food "grown or made in Alberta" from any of the following channels: farmers' markets, farm retail, CSA/box programs, and/or commercial sources (stores, on-line or buying club).

2.5.1 Market Size

Based on at least one purchase of local food from any of the channels examined, including farmers' markets, farm retail, CSA/box programs and commercial sources (stores, on-line or buying club), almost all households in Alberta (98.7%) had purchased local food in 2016. The remaining 1.3% had not purchased local food. Unlike in 2012, no one "did not know" if they had purchased local food in 2016.

Graph 27: Purchase of food grown or made in Alberta in the past 12 months
(Base = Total households)



Source: FM2, CSA2, FR2, R4, CS1a, CS1b, CS1c, CS1d, CS1e, CS1f, CS1g, CS1h, CS1i, CS1j, CS3a, CS3b (n=1,200)

This is an 8% increase in purchasing households over 2012, indicating that the availability and purchasing of local food is becoming main stream in the Alberta market place.

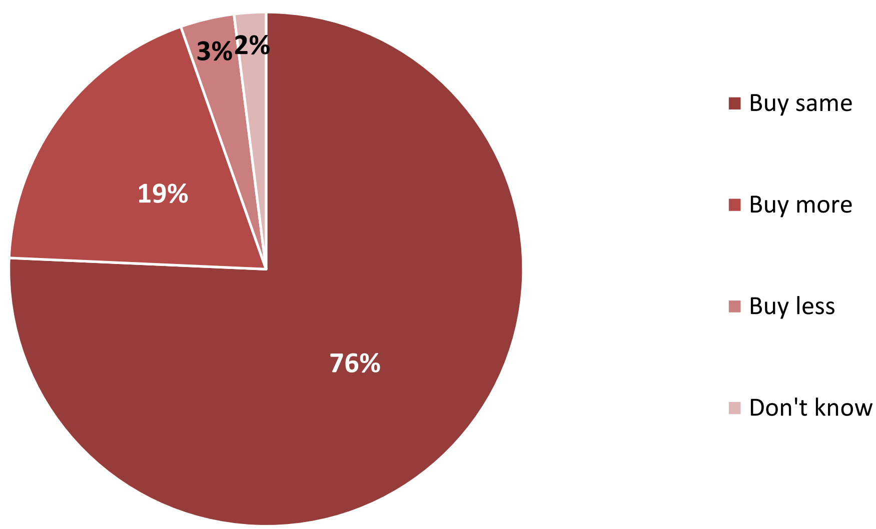
With 1,651,051 million households in Alberta, this translates into 1,646,097 million purchasing households.

2.5.2 Market Growth

Purchasing households generally believed that they would spend the same amount on local food in 2017 as compared to the previous year. This is a 15% increase in the proportion who expected their spending to plateau, as compared to 2012. Only 19% expected to spend more, 3% to spend less, and 2% did not know (Graph 28).

Graph 28: Purchase intentions for food grown or made in Alberta in the next 12 months

(Base = Total households)



Source: CS6, (n=1,200)

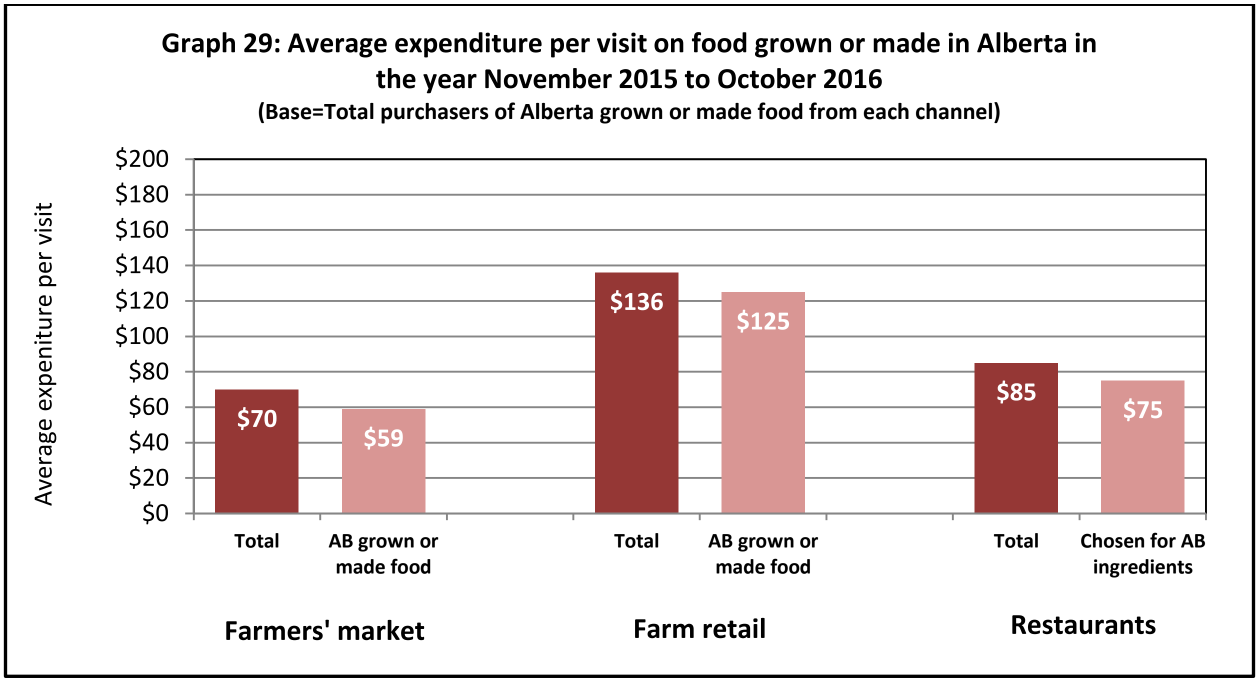
Among the 1.3% of non-purchasing households, one-third intended to start purchasing and one-third will not start purchasing. All remaining respondents reported don't know.

2.5.3 Market Value

Throughout the survey, for farmer' markets, farm retail and restaurants, serving local food or not, respondents were asked about their spending for the respective channel in the last year. This information was then used to determine the total market value of all local food purchases combined.

Per Visit Expenditures

For the two channels, farmers' markets and farm retail, the amount spent on local food per visit was almost equivalent to the total amount spent per visit. Thus, at these channels respondents were spending money on little else. Specifically, the proportion spent on local food per visit, of the total spent per visit, was 84% for farmers' markets and 92% for farm retail. Among those respondents who reported deliberately choosing to eat at a restaurant because it served food grown or made in Alberta, 88% of their restaurant expenditures were at restaurants serving local food. For restaurants chosen for Alberta ingredients it is not possible to say what proportion of the expenditures was actually made on Alberta ingredients. It is important to note that results for restaurants chosen for Alberta ingredients were not a subset of a total purchase, but the total of a different purchase.



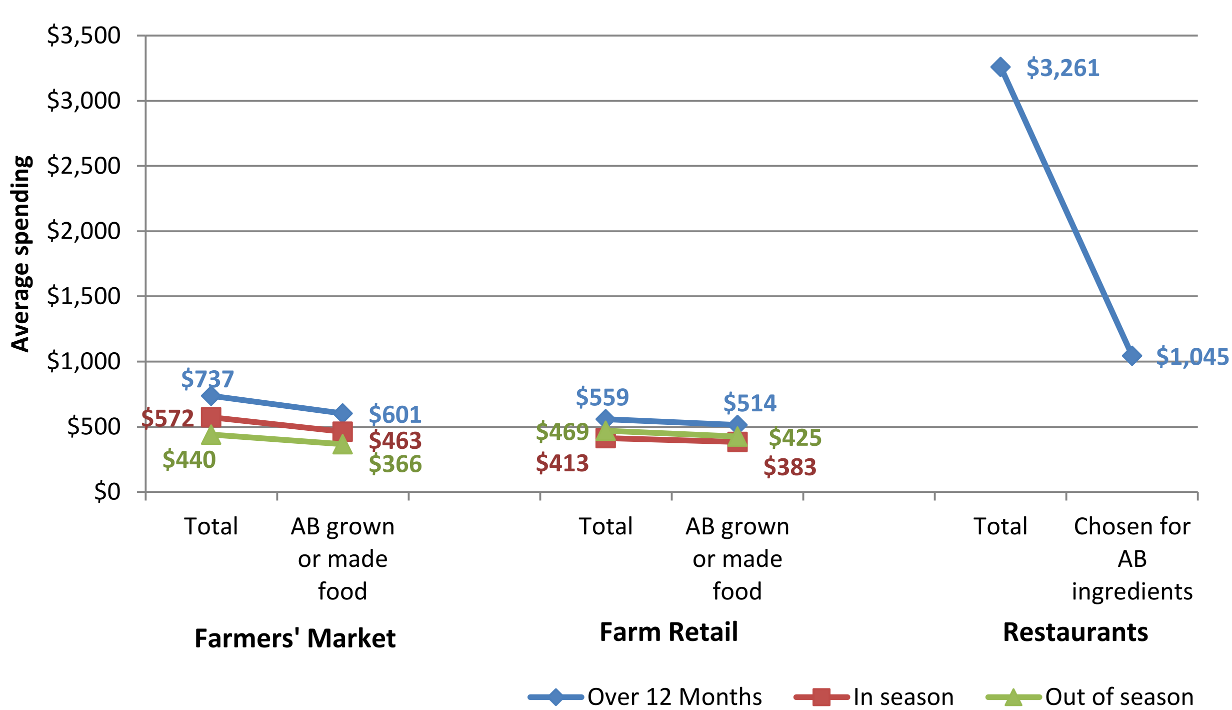
Source: FM5bi, FM5bii, FM6bi, FM6bii (n=921), FR5, FR6, FR8, FR9 (n=408), R3, R6 (n=263, 279)

Annual Household Expenditures

A similar trend can be seen for annual household expenditure as with average expenditure per visit in both farmers' markets and farm retail. The majority of the total annual spending in the channels was on local food at farmers' markets (82%) and farm retail (92%). This also holds across the in-season and out-of-season periods.

However, annual total expenditures on restaurants were significantly higher than spending on local food restaurants, which constituted only 32% of the total spending.

Graph 30: Average household expenditures by season and for the year
(Base = Total purchasers of each product in each season)



Source: Average purchaser expenditures for the season; outliers removed.
Farmers' Market FM5a, FM5bi, FM5bii, FM6a, FM6bi, FM6bii, (Out-of-season n=386, In-season n=878, Over 12 Months n=911)
Farm Retail FR4, FR5, FR6, FR7, FR8, FR9 (Out-of-season n=157, In-season n=357, Over 12 months n=395)
Restaurants chosen for AB ingredients R2, R3, R5, R6 (Over 12 months n=918, 275)
Note: No CSA expenditure data was gathered in the 2016 survey.
Previous survey used Fall (Sep to Oct), Summer (May to Aug), Winter (Nov to April). 2016 Survey used "In-season" (Jun to Oct) and "Out-of-season" (Nov to May).

Among respondents who visited a restaurant in Alberta, the average total amount spent per household in the past year across all respondents was $3,261; which is a $547 increase in spending per household from 2012. The average annual household expenditures of $1,045 on restaurants using ingredients grown or made in Alberta reported by purchasers represents 25% of their spending. When averaged across all restaurant users, spending at restaurants chosen for Alberta ingredients accounts for 11% of all restaurant expenditures.

Table 7: Average annual household spending on restaurant: November 2015 – October 2016

	Base = Households		
	Total Alberta households (wn=1,200)	Total purchasing from restaurants (wn=918)	Total purchasing from restaurants chosen for Alberta ingredients (wn=278)
Average annual spending per household on all restaurants	$2,495	$3,261	$4,112
Average annual spending per household on restaurants chosen for Alberta ingredients	$265	$319	$1,045
Annual spending on restaurants chosen for Alberta ingredients as a per cent of total spending on restaurants.	11%	10%	25%

Current Market Value

To calculate the current market value of local food the number of purchasers, the number of times they purchased from each channel each season and how much they spent on the last purchase in each season was used. Annual expenditures were calculated for each respondent in the survey and then projected to the population of households in Alberta. The estimate of the value of food grown or made in Alberta by market for the previous 12 months is shown in Table 8. Food grown or made in the province and sold through farmers' markets was valued at $753.7 million. While that sold through farm retail was estimated at $279.3 million and restaurant chosen for Alberta ingredients was estimated at $395.6 million.

Table 8: Estimated market value of food grown or made in Alberta by season over a 12 month period

	Estimate			Confidence Interval	
	2008	2012	2016	2016	
	Value ($000,000)	Value ($000,000)	Value ($000,000)	Lower bound ($000,000)	Upper bound ($000,000)
Farmers' markets					
In-season (n=511/717/878)*	$248.6	$477.2	$559.3	$540.8	$577.8
Out-of-season (n=135/265/386)	$55.5	$124.7	$194.4	$184.7	$204.1
Full Year (n=506/731/911)	$302.0	$598.4	$753.7	$729.2	$778.2
Farm retail					
In-season (n=268/269/357)*	$131.7	$109.1	$188.1	$178.3	$197.9
Out-of-season (n=58/67/156)	$22.0	$30.7	$91.2	$84.0	$98.4
Full Year (n=270/276/395)	$154.5	$143.8	$279.3	$265.5	$293.1
Restaurant for Alberta ingredients					
Full Year (n=-/231/275)	-	$373.9	$395.6	$372.2	$419.0

* Bases are for 2008, 2012 and 2016 respectively

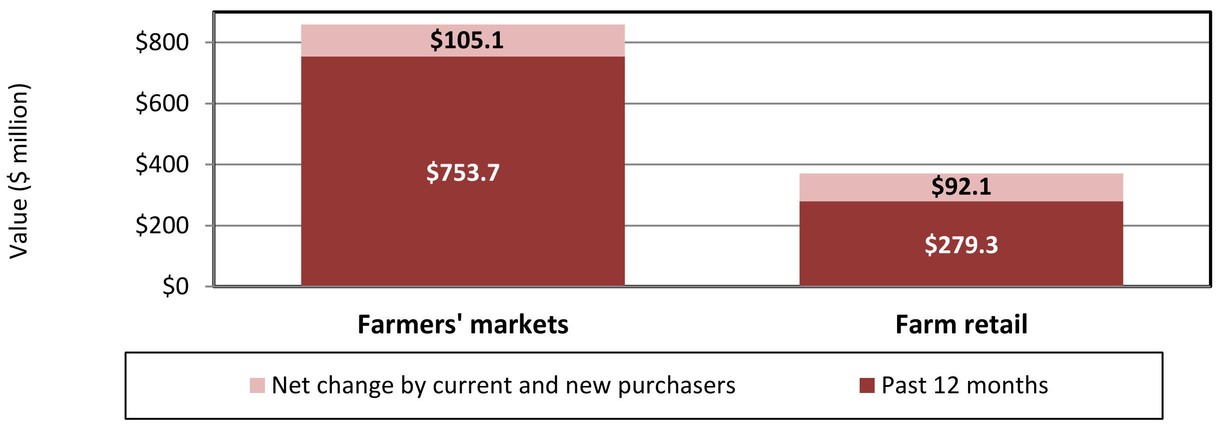
** Base too small to estimate reliably

Note: Seasonal figures may not add to exactly the same number as annual figures. Figures may not add due to rounding. Previous Survey used Fall (Sep to Oct), Summer (May to Aug), Winter (Nov to April). 2016 Survey uses "In-season" (Jun to Oct) and "Out-of-season" (Nov to May).

Projected Market Value

The survey did not directly ask the amount which households expected to increase, decrease or maintain spending on local food overall, however, the estimated amount was calculated based on estimated future spending by channel. Graph 31 shows that overall, sales of local food has the potential to grow faster in farm retail as compared to farmers' markets. This is due to the fact that a very high proportion of Alberta households currently visit farmers' markets leaving little room for growth from non-purchasers becoming new purchasers, therefore, in the future it is believed that market growth will come from increased spending by existing purchasers.

Graph 31: Estimate of potential growth in foods grown or made in Alberta by market
($ million) in the next 12 months)



Source: Data from Table 9

Further, Table 9 shows that the projected market value of local food sold through farmers' markets in the next 12 months will be $858.8 million, a $260.4 million increase in value over 2012. Similarly the farm retail channel will experience a $227.6 million increase from 2012.

Table 9: Estimated growth market value of food grown or made in Alberta in the next year

	Estimate ($ million)			Confidence Interval 2016	
	2008	2012	2016	Lower bound ($000,000)	Upper bound ($000,000)
Farmers' markets					
Value of purchases in the past year (n=506/731/912)*	$302.0	$598.4	$753.7	$729.3	$778.1
Estimated change in value of purchases in the next year (current purchasers and new market entries)	$88.6	$144.7	$105.1	$101.7	$108.5
PROJECTED MARKET VALUE IN 12 MONTHS	**$390.5**	**$743.1**	**$858.8**	**$832.3**	**$885.3**
Projected rate of growth in the next 12 months %*	29.3%	24.2%	13.9%	13.5%	14.4%
Farm retail					
Value of purchases in the past year (n=506/731/394)*	$154.5	$143.8	$279.3	$265.4	$293.2
Estimated change in value of purchases in the next year (current purchasers and new market entries)	$96.1	$100.4	$92.1	$87.5	$96.7
PROJECTED MARKET VALUE IN 12 MONTHS	**$250.6**	**$244.2**	**$371.4**	**$355.1**	**$387.7**
Projected rate of growth in the next 12 months %*	62.2%	69.8%	33.0%	31.5%	34.4%

* Bases are for 2008, 2012 and 2016 respectively

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

2.5.4 Purchasing Outlets

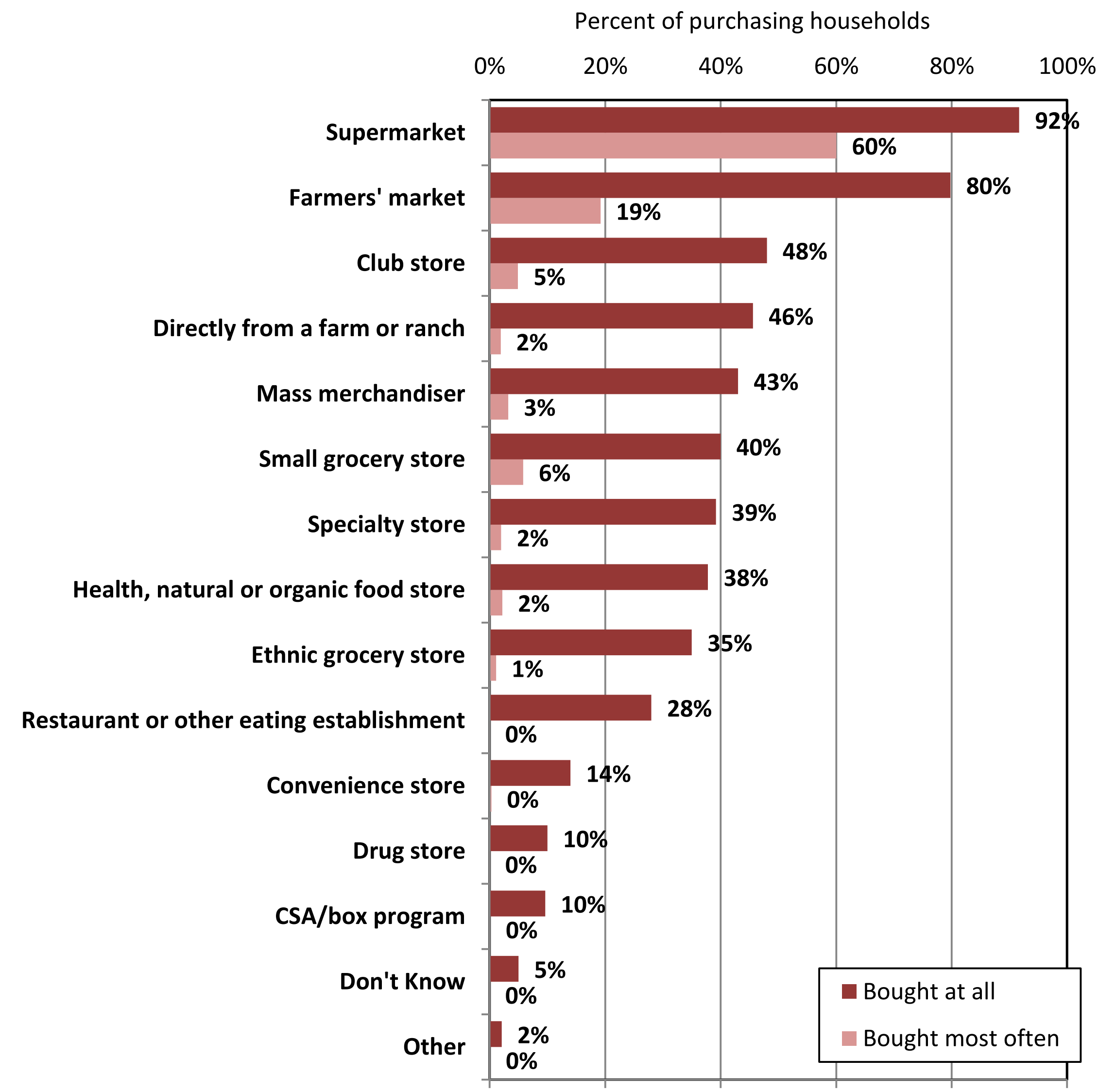
Following the format of the 2012 study, survey respondents were asked if they had bought food grown or made in Alberta from a variety of outlets in the past 12 months.

The findings, shown in Graph 32, contrast where people purchased with where they purchased most frequently. As in 2012, the primary source of local food was the supermarket. Examples of supermarkets provided in the survey included Superstore, Safeway, Sobeys, Save-On-Foods, IGA, Co-op, No Frills or a regular Walmart store. The largest proportion of households purchased local food from the supermarket (92%); additionally, it was where they "most often" purchased local food (60%). This is comparable to 2012, when 93% of respondents purchased from the supermarket and it was the source of local food "most often."

Other market channels where respondents bought local food included farmers' markets (80%), club stores (48%) (for example Costco, Real Canadian Wholesale Club, The Grocery People), and directly from a farm or ranch (46%). The remaining outlets were used by between 43% and 2% of households.

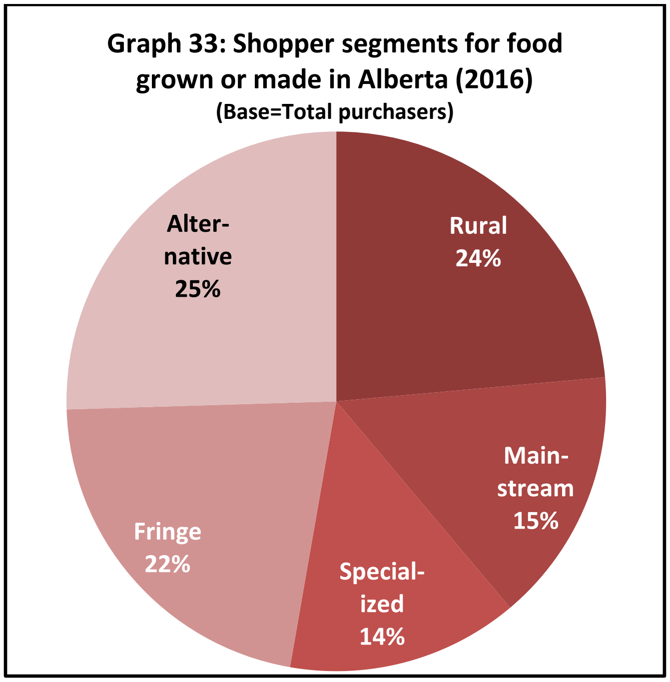
Considering where purchasers most often shop for local food, supermarkets (60%) and farmers' markets (19%) were most commonly cited.

Graph 32: Where households bought Alberta grown or made food in the past 12 months (2016)
(Base=Total households purchasing food grown or made in Alberta in the past 12 months)



Source: CS1 (n=1,200)
Note*: Restaurant or other eating establishment was not asked in question CS5

Factor analysis of the outlets where households purchased resulted in five factors; each respondent was then allocated to a single factor based on which factor received the highest score. The three largest shopper segments were rural (24%), alternative (25%), and fringe (22%). The rural segment remained similar in proportion to 2012 (+1%); while the alternative (+10%) and fringe segments (+5%) grew.



Source: Source: FM2, CSA2, FR2 (n=1,200)

Rural shoppers accounted for approximately one-quarter (24%) of shoppers in 2016 and consisted of individuals living in small centres or farms/ranches. These shoppers had high factor scores, which indicates a preference, for purchasing food from CSA box program, directly from a farm or ranch and farmers' markets. In 2016, the rural shopper segment dropped small grocery stores and added CSA/box programs.

Mainstream shoppers made up 15% of shoppers in 2016 which was a 10% decrease from 2012. This shopper segment preferred mass merchandisers, supermarkets and health food, natural or organic food stores. Compared to 2012, Mainstream shoppers replaced club stores with health food, natural or organic stores.

The Specialized segment, as in 2012, shopped primarily at specialty stores, and ethnic grocery stores. New to this factor are small grocery stores and restaurants.

Fringe continued to shop at convenience and drug stores, as well as health food, natural or organic food stores.

Alternative showed many changes in the factor loading. In 2016, alternative shopped at club stores and mass merchandisers as compared to supermarkets and restaurants in 2012. The change in the stores used indicates that the name "Alternative" may no longer be appropriate for this factor.

In Graph 34, the values in each table represent the share of respondents who accessed each type of outlet, whereas the varying shades of blue indicate factors that had the highest scores.

Graph 34: Mix of more and less frequently used stores for food grown or made in Alberta by shopper segment (2016) **(Base=Total in each shopper segment)**

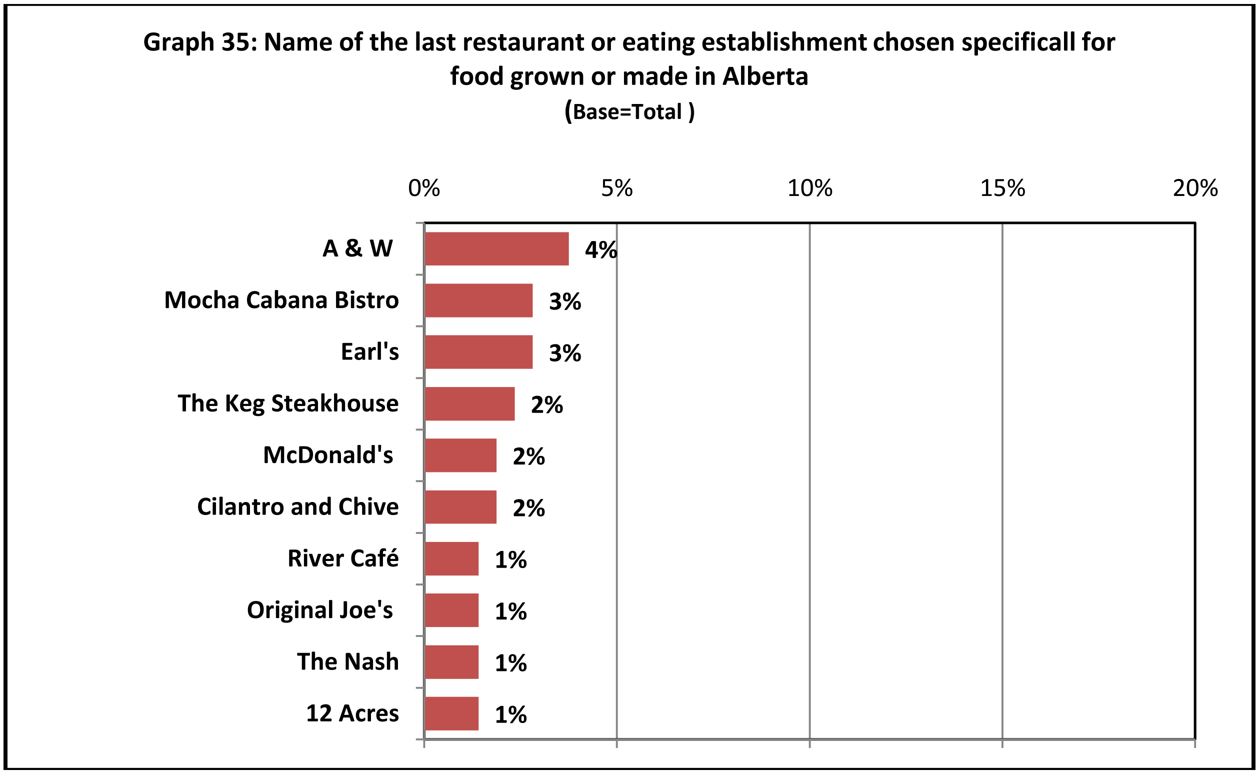
	Shopper Segment				
	Rural %	Mainstream %	Specialized %	Fringe %	Alternative %
Farmers' market	45	21	29		33
CSA/box program	70				
Directly from a farm or ranch (farm retail)	66				
Club store			20		85
Mass merchandiser		57			34
Supermarket		72	23		
Specialty store			61		32
Ethnic grocery store	23		67	25	
Health food, natural or organic food store	46	46		46	31
Restaurant			61		
Convenience store				74	
Drug store			25	76	
Small grocery store	23		47	23	

Highest use High use Low use

2.6 Restaurants

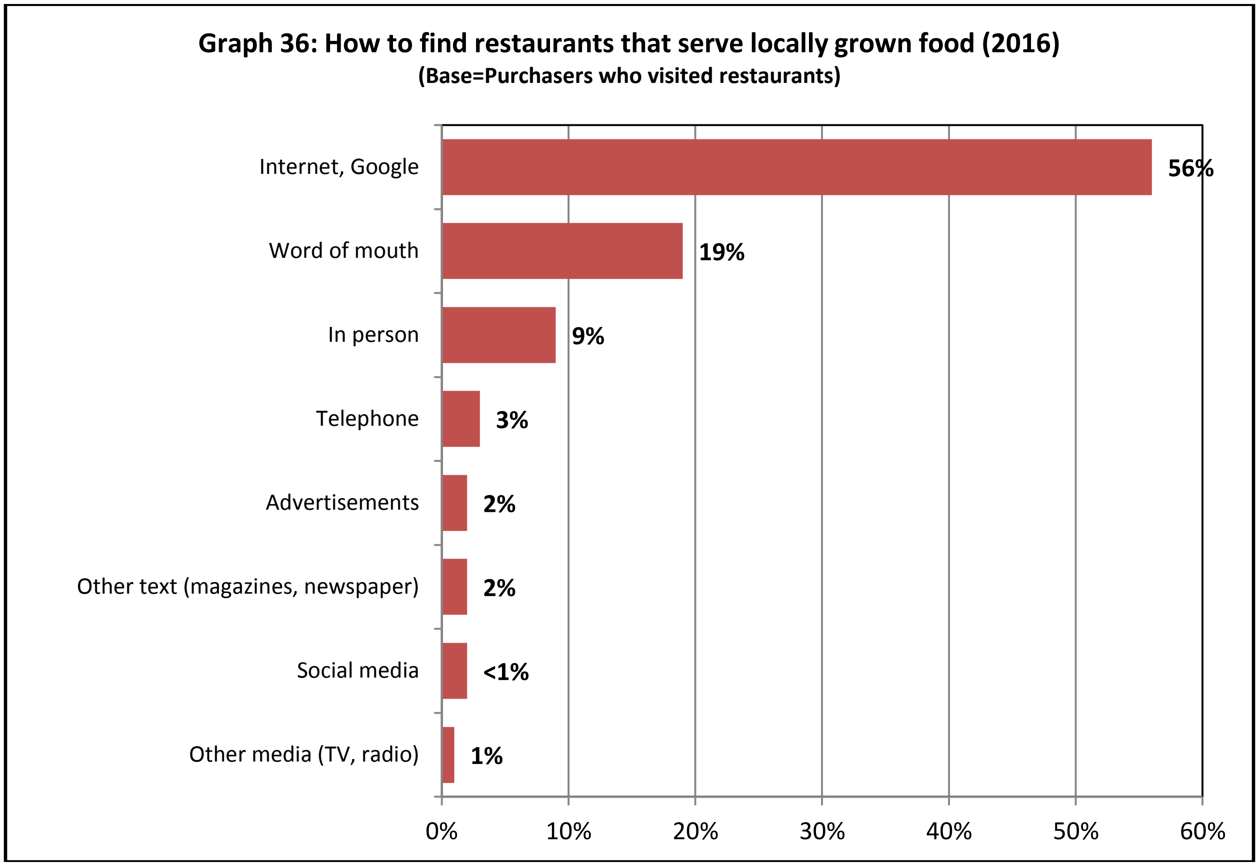
In the last year, 83% of all households purchased food from any restaurant in Alberta, including hotel restaurants, diners, grills, pubs, bistros, cafes, tea houses, food trucks, fast food chains, casino restaurants or any other eating establishment. Further, 28% of Alberta households deliberately choose to eat at a restaurant because it served food prepared from ingredients that are grown or made in Alberta.

Among the restaurants that purchasers mentioned as frequenting, A&W (4%) was most commonly mentioned, followed by Mocha Cabana Bistro (3%) and Earl's (3%) (Graph 35). Not surprisingly, 213 individuals responded to this question providing the names of a wide variety of local restaurants, which were only mentioned one time.



Source: R7 (n=213)
Note: The top 10 entries (n=45) were chosen as all remaining entries were <1%.

Despite the fact that only 28% of purchasers specifically sought out restaurants serving local ingredients, 60% of all respondents said that they knew how to find restaurants that serve local food. This suggests that awareness of restaurants is not impacting visitation. To find these restaurants, respondents said they would search the Internet (56%) and obtain referrals from others (word of mouth) (19%).



Source: R8, R8a (n=150)

2.7 Communication with Farmers' Markets and Farm Retail

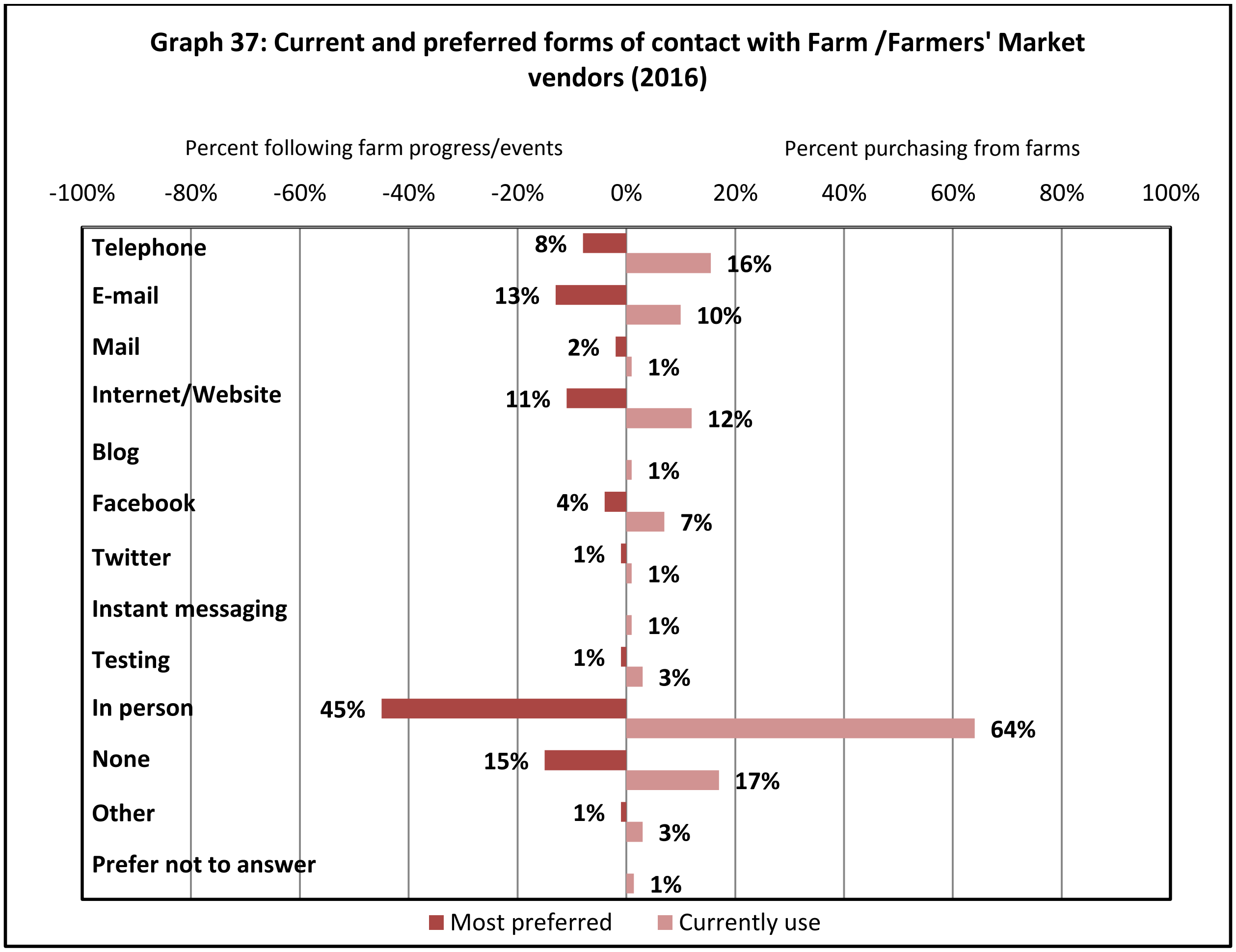
In 2016, the survey continued to ask purchasers' which communication methods they currently used to contact farms or farmers and farmers' market vendors that supplied their household with local foods (Graph 37). To communicate with farmers or market vendors, respondents use a variety of methods. The most common communication methods that are currently used by respondents include:

- In person (64%);
- Telephone (17%);
- Internet/website (12%); and
- Email (11%).

Almost one-fifth (16%) of respondents indicated that they did not contact farms or farmers' market vendors.

When considering how respondents would like to be in contact with farms/farmers/farmers' market vendors, the most common communication method reported was in person (45%) followed by email

(13%) and internet/website (11%). Those who preferred to use the telephone or social media (i.e. facebook, twitter) were more commonly rural residents, while those who preferred email or internet websites were from major urban centres (Edmonton and Calgary).



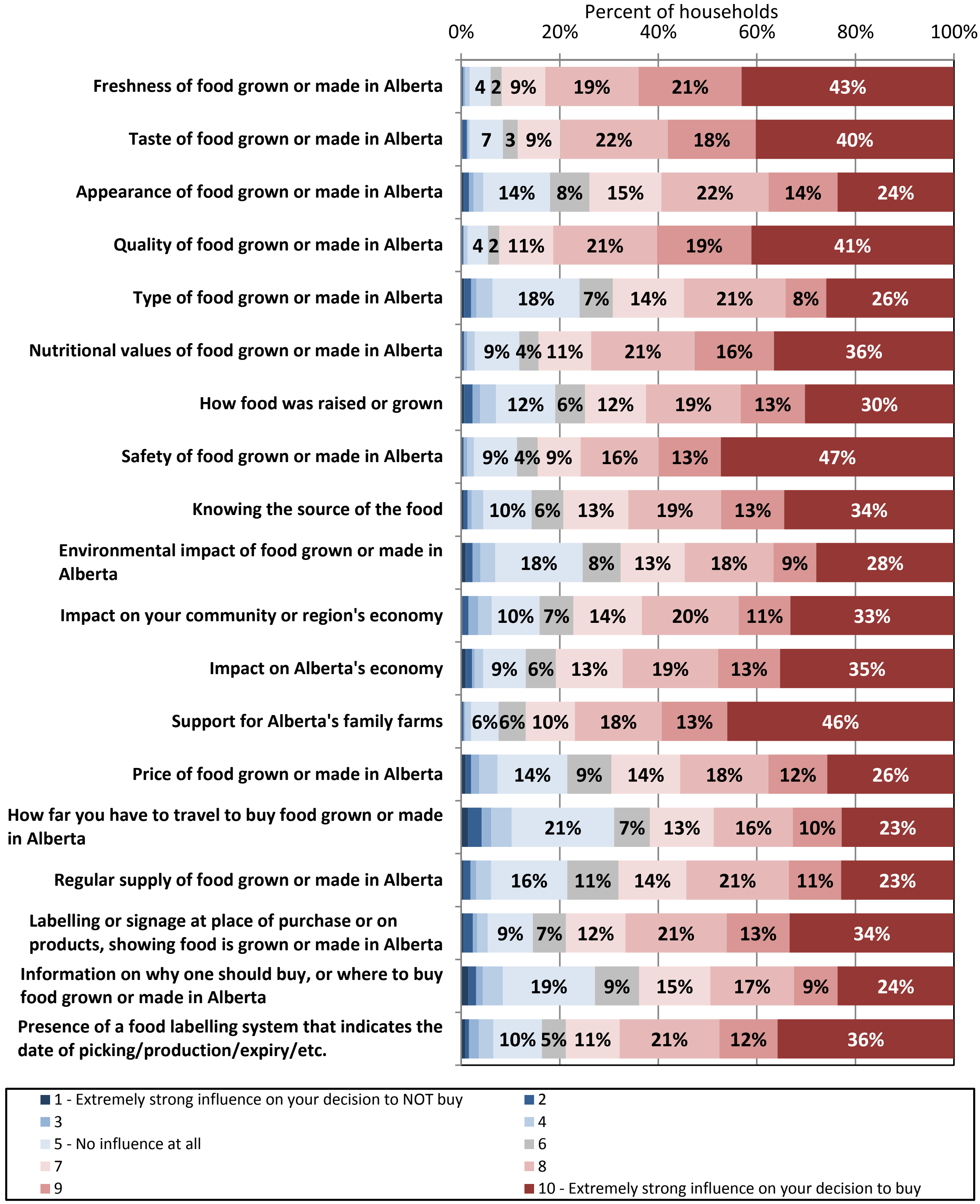
Source: C1, C2 (n=989). Currently use values are greater than 100% due to multiple responses.

2.8 Factors Influencing Purchasing

Respondents were provided with a list of factors that may influence their decision to purchase local foods, and asked to rank the degree to which the factors impacted their decision to purchase.

The factors that most commonly had an “extremely strong” influence on Alberta households’ decision to purchase local food were the safety of the food (47%), the fact that purchasing supported Alberta’s family farms (46%), as well as, the freshness (43%), quality (41%), taste (40%), and nutritional value (36%) of the food (Graph 38).

Graph 38: Strength of influence of various items on decision to buy, or not to buy, food grown or made in Alberta (2016)
(Base = Total households)



Source QAG4a to QAG4s (n=1,200)
Note: entries 1% or lower are not labeled.

Overall, however, none of the factors presented to respondents were felt to be unimportant, as all were ranked six or above by at least 70% or more of the respondents.

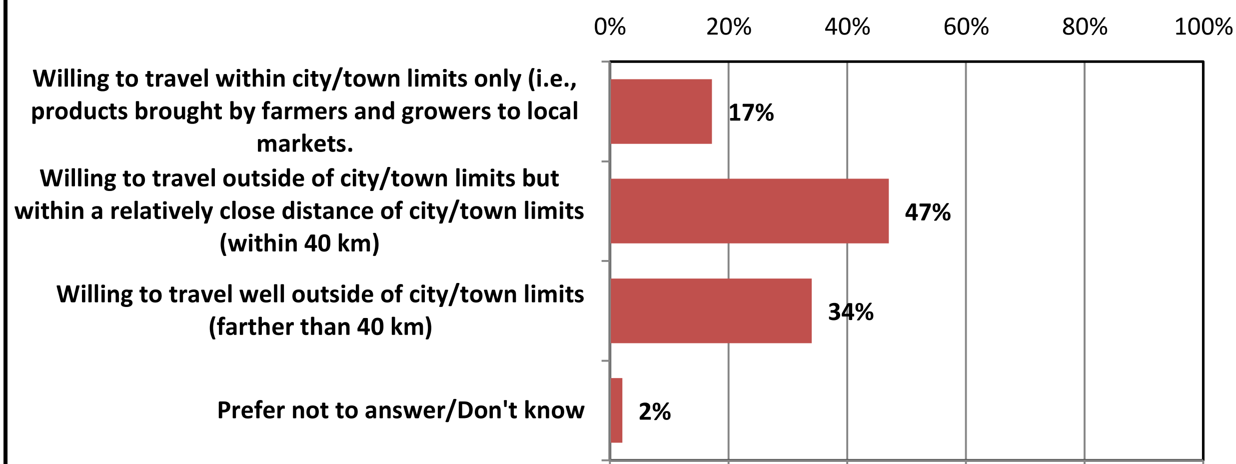
Factors most commonly receiving a rating of six or higher from respondents included:

- support of Alberta family farms (93%); and
- the quality (94%), freshness (94%) and taste (93%) of the food.

Factors which had the lowest rankings (of five or below) included the distance one had to travel to purchase local food (70%), and information on where and why one should buy local food (72%).

This aligns with the finding that 47% of households were willing to travel outside of their city or town limits for up to 40 km to purchase local food, and 34% were willing to travel a distance of greater than 40 km.

Graph 39: How far purchasers are willing to travel to purchase agriculture or food products directly from a farm in Alberta.
(Base=Total farm retail purchasers purchasing food grown or made in Alberta)



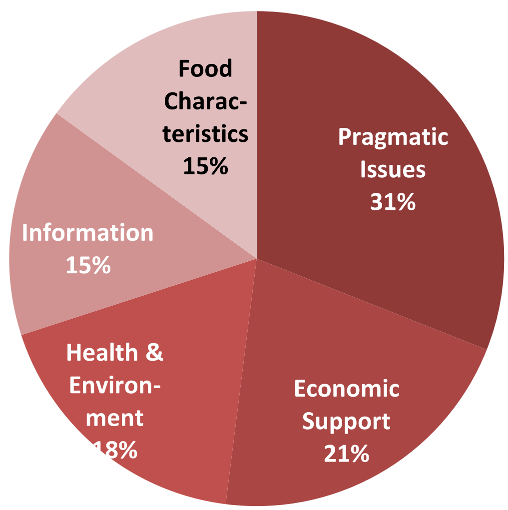
Source: FR17 (n=497)

A factor analysis of the factors influencing decisions to purchase local food resulted in five overarching themes that influence purchasing. These were named, as in the previous survey, food characteristics, pragmatic issues, information, economic support, and health and environment issues.

The groups are shown in Graph 40 with the following trends being observed:

- Approximately one third (31%) of households were influenced by **pragmatic issues**; which is a 5% increase from 2012. These issues included the price of the food and how far you had to travel to buy the food.
- **Economic support** included three influencing factors: the impact on one's community or region's economy, the impact on Alberta's economy and support for Alberta's family farms. The need to economically support their community influenced 21% of households in 2016, up 2% from 2012.
- **Health and Environment** issues including the nutritional value, method of raising/growing the food, safety and source of the food and environmental impact of the food grown influenced the spending of 18% of households in 2016 as in 2012.
- **Information** was important to 15% of household this year as compared to 17% in 2012. To these households the freshness, taste, appearance, quality and type of food available, as well as, the labeling at the retail site, the presence of a labeling system and information on the product were most important in influencing their decision to purchase.
- **Food characteristics** alone was the driving influencer for 15% of households in 2016; a decline of 5% from 2012. In 2016, it appears that this group has changed as freshness, taste and quality of food were the most important influencers to buy local food.

Graph 40: Predominant themes influencing the decision to buy, or not to buy, food grown or made in Alberta (2016)
(Base=Total households)



Source: Factor Analysis

2.9 Demographic and Geographic Purchaser Profiles

Overall, 98.7% of the households had purchased local food through at least one of the channels: farmers' markets, farm retail, CSA/box programs, restaurants serving local food, and retail outlets. Below is a discussion of how various demographic and geographic purchasing profiles influenced behavior surrounding the purchase of local food.

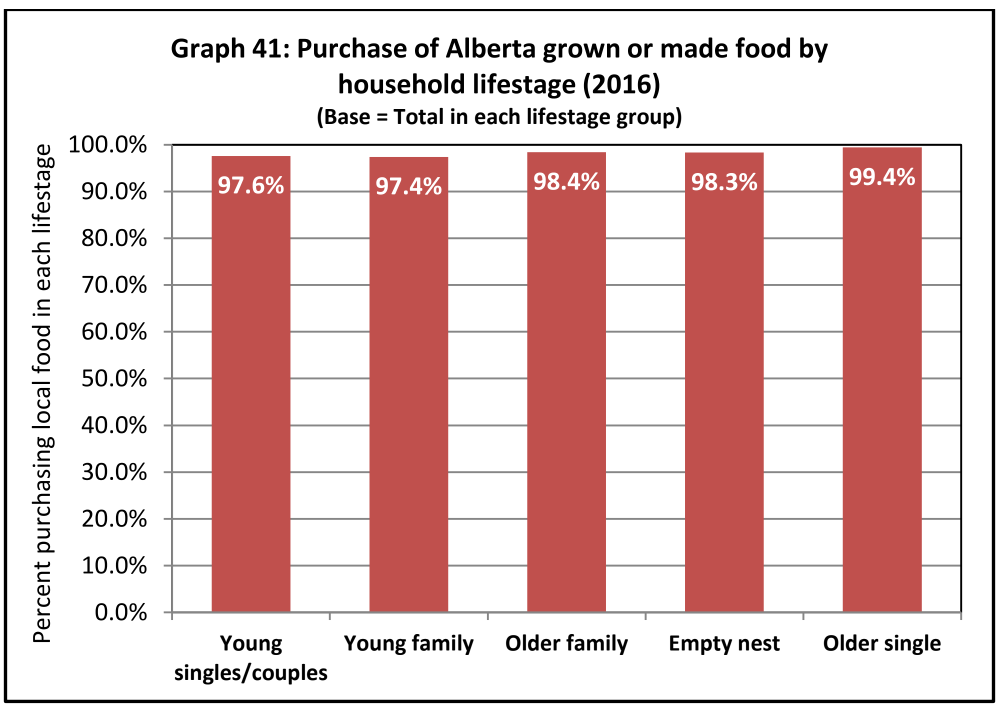
2.9.1 Gender

Local food was equally likely to be purchased by both women and men. Further, men and women were equally likely to have purchased at a farmers' market, farm retail and CSA/box channels. Women were, however, more likely than men to:

- Chose a restaurant specifically because it serves local food (31% vs. 22%);
- Have purchase from the farm retail channel out-of-season (43% vs. 34%);
- Shop at a retail outlet specifically because it sells local food (46% vs. 30%);
- Live in a household where a member cooks most of the meal from scratch (91% vs. 85%);
- Have heard of the term local food (94% vs. 90%); and
- Plan to go to a farmers' market in the future (83% vs. 78%).

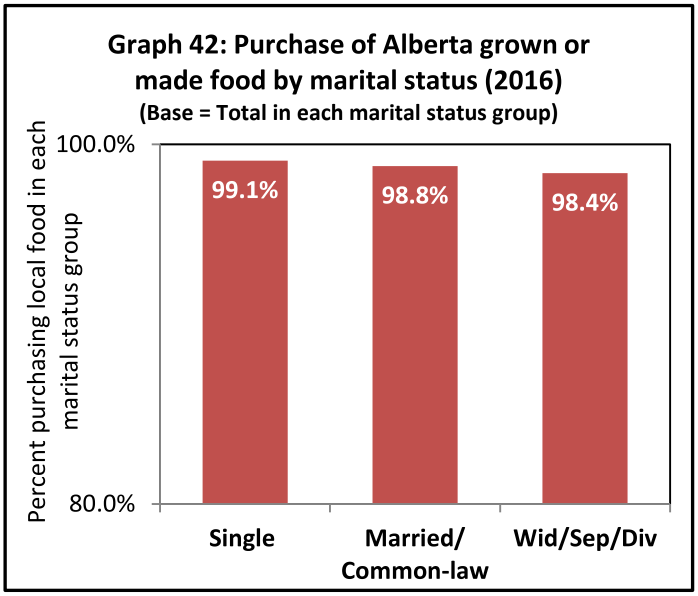
2.9.2 Social Characteristics

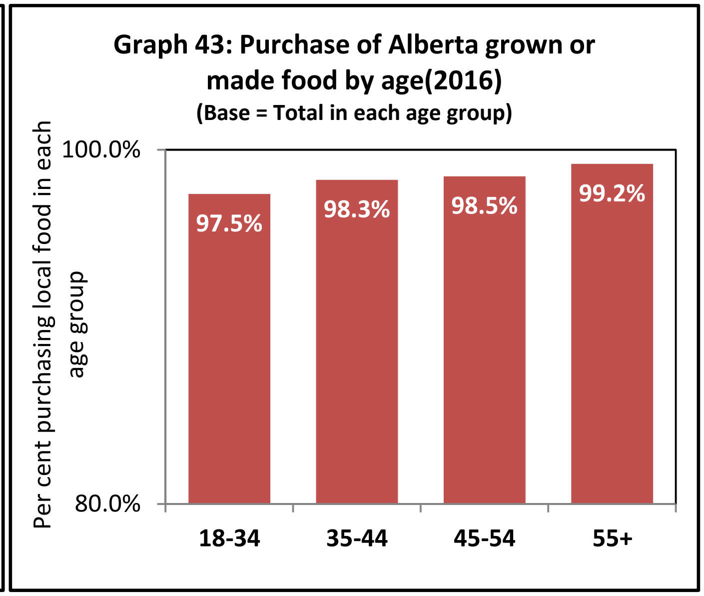
Graph 41, shows that across all life stages almost all households had made at least one purchase of local food through one of the five channels investigated.



Source: QFM2, QFR2, R4, QCS1a-j, CS3 (n=1,200)

Market penetration differed slightly by marital status and age. Thus, 99.1% of single, 98.8% of married/common law and 98.4% of widowed/separated/divorced individuals had purchased local food from a channel in the last year. Similarly, between 97.5% and 98.5%% of those aged 18 to 54 had purchased local food in the past year. Among those aged 55 or older, 99.2% had purchased local food.





Source: D6 (n=1,200)
Note: 2016 percentage of “Prefer not to Answer” responses (2%)

Source: D4 (n=1,200)
Note: 2016 percentage of “Prefer not to Answer” responses (1%)

Marital status and age however, did influence behaviors related to purchase of local food.

The following observations were made for age:

- Those aged 35 to 44 are least likely to purchase from a farmers’ market (75% vs. 78% of 45 to 54, 81% of 55 or over and 82% of 18 to 34 year olds);
- Those aged 45 to 54 are more likely to eat a restaurant that serves food made with local ingredients (30% vs. 24% of 18 to 34, 27% of 35 to 44 and 28% of those over 55);
- Those aged 18 to 34 (18%) are more likely than those aged 35 to 44 (14%), 45 to 54 (10%) and 55+ (9%) to purchase from a CSA/box program;
- Those aged 18 to 34 (50%) and 35 to 44 (54%) are more likely than those aged 45 to 54 (46%) and 55+ (44%) to purchase from farm retail;
- Those aged 55+ are most likely to not plan to go to farm retail in the future (61% vs. 51% (45 to 54), 53% (35 to 44) and 57% (18 to 34)).

The following observations were made for marital status. Married/common law couples are more likely to:

- Shop at farmers’ markets (85% vs. 73% of singles and 75% of widowed/separated /divorced), farm retail (51% vs. 30% of singles and 35% widowed/separated /divorced) and local food restaurants (29% vs. 24% of singles and 26% of widowed/separated /divorced);
- Grow their own food (54% vs. 35% of singles and 41% of widowed/separated /divorced);
- Make meals from scratch (92% vs. 78% of singles and 81% of widowed/separated /divorced); and

- Plan to attend a farmers' market (83% vs. 74% of singles and 76% of widowed/separated /divorced) and farm retail (45% vs. 33% of singles and 36% of widowed/separated /divorced) channel in the future.

2.9.3 Economic Characteristics

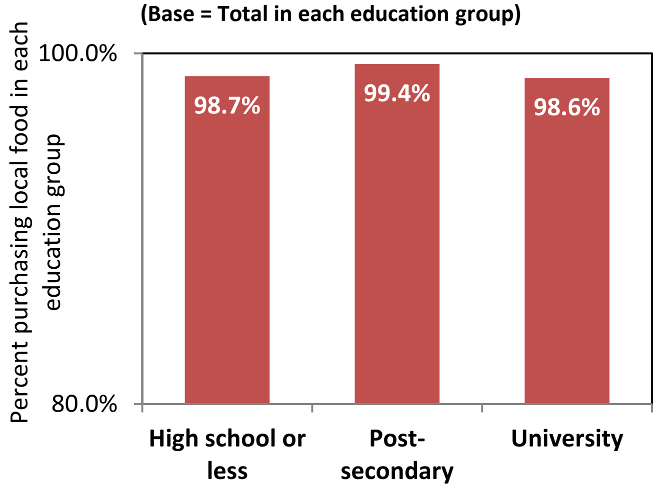
Level of education and income also did not influence purchasing of local food. Over 97% of all education and income categories had purchased local food. Further education did not impact purchasing behavior related to local food.

Households with incomes of $120,000 or greater more frequently purchase at all channels including:

- Farmers' markets (85% vs. <80K 78% and $80-$120K 78%);
- CSA/box programs (18% vs. <80K 8% and $80-$120K 11%); and
- Farm retail (55% vs. <80K 36% and $80-$120K 46%).

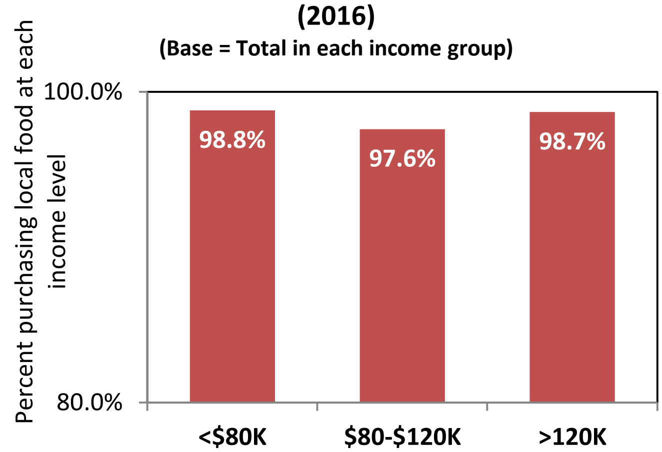
With regards to restaurants that serve food prepared with local ingredients, households with incomes of between $80,000 and $120,000 were more likely to purchase at this channel (32% vs. <80K 22% and >120K 28%).

Graph 44: Purchase of Alberta grown or made food by education level (2016)
(Base = Total in each education group)



Source: D5 (n=1,200)
Note: 2016 percentage of "Prefer not to Answer" responses (2%)

Graph 45: Purchase of Alberta grown or made food by household income group (2016)
(Base = Total in each income group)



Source: D7 (n=1,200)
Note: 2016 percentage of "Prefer not to Answer" responses (32%)

2.9.4 Geographic Characteristics

Across all regions, almost all the households surveyed had, at least once, purchased from one channel selling local food within the past year.

The following regional differences were noted:

- Calgary and region buyers are most likely to purchase at farmers' market in the out-of-season period (51% vs. 31% to 45% of respondents in all other regions) which may be the result of ;
- Farm retail purchases are more often made by those living in rural (61%) or other urban locations (50%) as compared to Edmonton (41%) and Calgary (38%);
- Rural (42%) and other urban (43%) more often make farm retail purchases out-of-season (37% Edmonton and 40% Calgary);
- Rural (46%) and other urban (46%) were more likely to travel to purchase at a retail outlet that sells local food (compared to 38% of Edmonton and 34% of Calgary respondents); and
- Rural more often grow their own food (65%) and cook meal from scratch (94% compared to all other regions).

SECTION 3: CONCLUSION

The 2016 survey examined three local food market channels, farmers' markets, farm retail and restaurants serving local food. A short section was included for CSA/box programs.

The findings show that Albertans are aware of these market channels and the levels of familiarity continue to grow. Additionally, the incidence of purchasing at all markets has grown since 2012. Overall, 98.7% of the households surveyed had purchased local food in the past year. Further, a very high proportion of Albertans (78%) purchased products from farmers' markets in the last year, suggesting that this market may become saturated in the future. With approximately 36% of Alberta households purchasing through the farm retail channel, it has experienced significant growth, with opportunity for future growth. One factor challenging future growth, of both farmers' markets and farm retail, is the loss of existing purchasers.

Purchasing of local food has increasingly become a year-round activity, rather than simply a "summer" market option. From 2012 to 2016, both farmers' markets and farm retail saw marked growth in the number of year round purchasers.

Due to the lengthening of the market season, both farmers' markets and farm retail saw growth in average expenditure per visit; suggesting that households are going more often and spending more per visit at most channels. Both farmers' markets and farm retail are projected to see an increase in market value over the next year (13.9% and 33.0% respectively).

Married purchasers and young family purchasers are frequently purchasing local food through farmers'' markets, farm retail, and restaurants using local ingredients. Conversely, gender did not significantly influence purchasing patterns. Purchasing was positively correlated with household income, preparing food at home and growing your own food at home.

Albertans consider food "local" if it is grown both in Alberta or near where an individual lives; few confuse organic with local food. Food safety and the ability to support local farmers were important influencing factors in Albertans' purchasing decisions around local food. Household purchasers are also influenced by the quality, freshness, and taste of local food.

Appendix A: Survey Instrument

Alberta Agriculture and Forestry
Local Food Demand Survey

Section A: Screener

Introduction
[TELEPHONE ONLY] Hello, my name is [ ], and I am calling from R.A. Malatest & Associates on behalf of Alberta Agriculture and Forestry. Alberta Agriculture and Forestry is conducting a survey to understand Albertans' preference for buying local food or dining at restaurants that serve local food. Findings from the study will help Alberta farmers and food processors better meet Albertans' need for locally grown food. [IF ASKED: AGRICULTURE AND FORESTRY IS A DEPARTMENT OF THE GOVERNMENT OF ALBERTA]

The survey should take approximately 10-15 minutes. To participate in this survey you must be 18 years of age or older.

The personal information collected during this survey is for the purpose of helping Alberta farmers and food processors better meet Albertans' need for locally grown food. The collection is authorized under section 33(c) of the *Freedom of Information and Protection of Privacy* (FOIP) *Act,* and is managed and protected in accordance with the Act. All the information you provide will be reported in aggregate. [IF ASKED: 'AGGREGATE' DEFINED AS 'GROUPED TOGETHER WITH OTHER RESPONDENTS']

[MUST READ CONTACT DETAILS IN FULL] Questions about the collection of personal information may be directed to:

MIMI LEE, NEW VENTURE ECONOMIST, ALBERTA AGRICULTURE AND FORESTRY
Provincial Building, #230, 4709 – 44 Avenue, Stony Plain, AB T7Z 1N4
PHONE: (780) 968-3552 (TOLL FREE IN ALBERTA 310-0000)
EMAIL: MIMI.LEE@GOV.AB.CA

To thank you for participating, you will be entered in a draw for a $300 pre-paid Visa credit card.

Would you be willing to complete the survey? [IF INTERESTED BUT NOT A GOOD TIME: SET UP APPOINTMENT FOR CALL BACK]

For all other questions about the survey, please contact:

Eleanor Hamaluk, R.A. Malatest & Associates Ltd.
PHONE: 780-448-9042 (TOLL FREE 1-877-665-6252)
EMAIL: E.HAMALUK@MALATEST.COM

A. Are you one of the heads of your household? [DO NOT READ LIST]
 1. Yes [Go to B]
 2. No [Go to AA]

AA. May I please speak to a household head?
 1. Yes, available [Go to Introduction]

2. Yes, call back [Arrange callback time]
3. No [Thank and end survey]

B. Some of the questions will be about purchasing food. Would you be in a position to talk about PAST food purchases and expenditures made by your household? [DO NOT READ LIST]

1. Yes [Go to C]
2. No [Go to BB]

BB. May I please speak to a household head who can do this?

1. Yes, available [Go to Introduction]
2. Yes, call back [Arrange callback time]
3. No [Thank and end survey]

C. As part of your current job, do you or any members of your immediate family make purchasing decisions about food? For example, purchasing food for COMMERCIAL PURPOSES such as for restaurants or other food service businesses.

1. Yes [Thank and end survey]
2. No

D. Please tell us the first three digits of your Postal Code. ______ [WATCH QUOTAS]

ALBERTA GROWN OR MADE FOOD

AG1. Have you heard the term "local food"? [DO NOT READ LIST; ONLINE: PROVIDE RESPONSES]

1. Yes
2. No
99. Don’t know

AG2. When you hear the term “local food”, what do you think of? [TELEPHONE: RECORD VERBATIM RESPONSE; ONLINE: LEAVE AS OPEN ENDED WITH NO PRECODES]

99. Don’t know

AG3. What criteria must food have for you to consider it as “local food”? [DO NOT READ LIST, SELECT ALL THAT APPLY; ONLINE: LEAVE AS OPEN ENDED WITH NO PRECODES]

1. It is grown in Alberta
2. It is grown in British Columbia
3. It is grown in Saskatchewan
4. It is grown in Manitoba
5. It is grown in Canada
6. It is grown in/or near where I live (i.e. within a 50 to 100 km radius)
7. It has not spent a long time in shipping
8. It is not grown in Alberta but it is processed or made in Alberta
9. It is grown in Alberta but processed in another province
10. It is organic
11. Other: [RECORD VERBATIM]
99. Don’t know

AG4. People have different reasons for purchasing or not purchasing food grown or made in Alberta. Using a scale from 0 to 10, to what extent do each of the following factors influence YOUR decision to buy, or to not buy, food grown or made in Alberta?

10 means the factor has an extremely strong influence on your decision to buy;
5 means the factor has no influence at all; and
0 means that the factor has an extremely strong influence on your decision not to buy.

On your decision to buy or to not buy, how strong an influence is the... [READ]? [RANDOMIZE ORDER OF PRESENTATION]

a. Freshness of food grown or made in Alberta

b. Taste of food grown or made in Alberta

c. Appearance of food grown or made in Alberta

d. Quality of food grown or made in Alberta

e. Type of food grown or made in Alberta

f. Nutritional value of food grown or made in Alberta

g. How the food was raised or grown

h. Safety of food grown or made in Alberta

i. Knowing the source of the food

j. Environmental impact of food grown or made in Alberta

k. Impact on your community or region's economy

l. Impact on Alberta's economy

m. Support for Alberta's family farms

n. Price of food grown or made in Alberta

o. How far you have to travel to buy food grown or made in Alberta

p. Regular supply of food grown or made in Alberta

q. Labelling or signage at place of purchase or on products, showing food is grown or made in Alberta

r. Information on why one should buy, or where to buy food grown or made in Alberta

s. Presence of a food labelling system that indicates the date of picking/production/expiry/etc.

AG5. Do you or does any member of your household grow food for your household to eat?

1. Yes
2. No
99. Don’t know

AG6. Do you or does any member of your household cook MOST of your meals from scratch?

1. Yes
2. No
99. Don't know

AG7. Would you accept "local food grown or made in Alberta" as an acceptable definition of 'local food'?

1. Yes
2. No
99. Don't know

[TELEPHONE: READ/ONLINE: PROVIDE TEXT] Throughout the survey, we will refer to "local food". [If AG7=2, then read / INSERT TEXT: Although you disagree with the term, ...] For the purposes of this survey, local food is defined as "food grown or made in Alberta".

FARMERS' MARKETS

FM1. How much do you know about Farmers' Markets, that is, a place or space which is open on a regular scheduled basis, where one can buy fresh fruits and vegetables, bedding plants and flowers, herbs, honey, meat and other farm products, including processed food like jams, pies and sausages, from farmers and growers who sell at stalls or tables there. Overall would you say you: [READ LIST; ONLINE: PROVIDE RESPONSES]

5. Know a lot about them
4. Know something about them
3. Know a little about them
2. Have heard of but know nothing about them [Go to FM10]
1. Have never heard of them [Go to FM10]
99. Prefer not to answer[Go to FM10]

FM2. In the past 12 months, that is **between November 2015 and October 2016**, did you or any member of your household PURCHASE products from a farmers' market in Alberta? [DO NOT READ LIST; ONLINE: INCLUDE RESPONSES]

1. Yes
2. No [Go to FM10]

FM3. How far are you and members of your household willing to travel in order to purchase food products at a farmers' market in Alberta? [READ LIST; ONLINE: PROVIDE REPSONSES]

1. Willing to travel within town/city limits ONLY (i.e. products brought by farmers and growers to local markets)
2. Willing to travel outside of city/town limits, but within a relatively close distance of city/town limits (i.e. within a 40 km radius of city/town limits)
3. Willing to travel well outside of city/town limits (farther than 40 kms outside of city/town limits)

98. No response
99. Don't know

FM4. Did you purchase food from a farmers' market.....

a. Out of season (**from November 2015 to May 2016**)?

1. Yes
2. No
99. Don't know

b. In season (**from June 2016 to October 2016**)?

1. Yes
2. No
99. Don't know

[IF FM4 A AND B=99 OR IF FM4A AND B=2 SKIP TO FM10]

FM5a. [ASK IF FM4a=1] During the out of season period, that is **from November 2015 to May 2016**, how many times did you and members of your household purchase products from a farmers' market in Alberta? [RECORD NUMBER]

_______________ # TIMES LAST OUT OF SEASON [RANGE =1-98]

FM5bi. [Ask if FM4a=1] Please think back to the LAST visit you made to a farmers' market in Alberta **during that out of season period**. How much did you and members of your household spend in total? [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______________ $ SPENT IN THE OUT OF SEASON [RANGE $1-9998]

FM5bii. [Ask if FM4a=1] How much of this amount was spent on FOOD grown or made in Alberta? For example, please exclude any food from BC or elsewhere, pet foods and any non-food items. [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______________ $ SPENT ON ALBERTA FOOD [RANGE $1 to FM5bi]

FM6a. [Ask if FM4b=1] During the in-season this year, that is **from June 2016 to October 2016**, how many times did you and members of your household purchase products from a farmers' market in Alberta? [RECORD NUMBER]

_______________ # TIMES IN-SEASON [RANGE =1-98]

FM6bi. Please think back to the LAST visit you made to a farmers' market in Alberta **during that in-season period**. How much did you and members of your household spend in total? [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______________ $ SPENT DURING LAST IN-SEASON VISIT [RANGE $1-9998]

FM6bii. How much of this amount was spent on FOOD grown or made in Alberta? For example, please exclude any food from BC or elsewhere, pet foods and any non-food items. [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______________ $ SPENT ON ALBERTA FOOD [RANGE $0 to FM6bi]

FM7. IN THE NEXT 12 MONTHS, do you expect that you and members of your household will spend more, less or the same as last year on purchases from farmers' markets in Alberta? [DO NOT READ LIST; ONLINE: INCLUDE RESPONSES]

1. More

2. Less
3. Same
98. No response
99. Don't know

FM8ai. [Ask if FM4a=1] You and members of your household made [INSERT ANSWER FROM FM5A, OR '0'] visits to a farmers' market during the last out of season period. How many times do you think you and members of your household will go to a farmers' market during the current out of season period (**November 2016 to May 2017**)?

_______________ # TIMES OUT OF SEASON [RANGE =1-98]

FM8aii. [Ask if FM4a=1] When you go, do you think that you will spend more, less or the same PER VISIT?

1. More [Go to FM8bi]
2. Less [Go to FM8bi]
3. Same [Go to FM10]
98. No response [Go to FM10]
99. Don't know [Go to FM10]

FM8bi. [Ask if FM4a=1] How much [RECALL FM8aii=1 (more) OR 2 (less)] do you think you and members of your household will spend PER VISIT? Please report this as a dollar amount. [IF FM8aii=1 READ/INCLUDE TEXT: When reporting this amount, it should reflect additional spending above and beyond any increases you think will occur due to inflation.]

_________________ $ [RECALL FM8aii=1 (more) OR 2 (less)] PER VISIT [Go To FM9a]
99. Don't know [GO TO FM8bii]

FM8bii. [Ask if FM4a=1 and FM8bi=99] Would you be able to report this as a percentage, as compared to previous spending?

1. Yes - _________________ % [RECALL FM8aii=1 (more) OR 2 (less)] PER VISIT
99. Don't know

FM9ai. [Ask if FM4b=1] You and members of your household made [INSERT ANSWER FROM FM6a, OR '0'] visits to a farmers' market during the last in season period. How many times do you think you and members of your household will go to a farmers' market during the next in-season period (**June 2017 to October 2017**)?

_______________ # TIMES IN-SEASON [RANGE =1-98]

FM9aii. [Ask if FM4b=1] When you go, do you think that you will spend more, less or the same PER VISIT?

1. More [Go to FM9bi]
2. Less [Go to FM9bi]
3. Same [Go to FM10]
98. No response [Go to FM10]
99. Don't know [Go to FM10]

FM9bi. [Ask if FM4b=1] How much [RECALL FM9aii=1 (more) OR 2 (less)] do you think you and members of your household will spend PER VISIT? Please report this as a dollar amount. [IF FM9aii=1 READ/INCLUDE TEXT: When reporting this amount, it should reflect additional spending above and beyond any increases you think will occur due to inflation.]

_________________ $ [RECALL FM9aii=1 (more) OR 2 (less)] PER VISIT
99. Don't know [GO TO FM9bii]

FM9bii. [Ask if FM4b=1] Would you be able to report this as a percentage, as compared to previous spending?

1. Yes - _________________ % [RECALL FM9aii=1 (more) OR 2 (less)] PER VISIT
99. Don't know

FM10. If 0 means 'no chance' and 10 means 'certain', what number would you choose between 0 and 10 to describe how likely you and members of your household would be to PURCHASE food products at a farmers' market in Alberta **in the next 12 months**? [DO NOT READ LIST; ONLINE: INCLUDE SCALE]

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

99. Prefer not to answer

[IF "0-5" OR 99, SKIP TO CSA/BOX PROGRAM CSA1; OTHERWISE CONTINUE]

FM11. **In the next 12 months**, how many times do you think you and members of your household will PURCHASE products at a farmers' market in Alberta? [RECORD NUMBER]

_________________ # Times
99. Don't know

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

CSA1. In Community Supported Agriculture or Community Shared Agriculture and Box Programs, households purchase a subscription to receive a box of freshly harvested food such as fruit and vegetables, dairy or meat products, every week. How much do you know about Community Supported or Shared Agriculture or Box Programs? Overall would you say you are aware or unaware of:

a. Community Supported Agriculture

2. Aware
1. Unaware [Go to FR1]

b. Community Shared Agriculture or Box Programs

2. Aware
1. Unaware [Go to FR1]

CSA2. In the past 12 months, that is **between November 2015 and October 2016**, did you or any member of your household subscribe to a Community Supported Agriculture or Box Program in Alberta? [DO NOT READ LIST; ONLINE: INCLUDE RESPONSES]

1. Yes
2. No
99. Don't know

FARM RETAIL

FR1. How much do you know about Farm Retail purchasing, that is, buying products like fresh fruit and vegetables, flowers, bedding plants and nursery stock, herbs, meat and other farm products, including wine, honey, jams, pies and sausages, at a farm or ranch gate, a farm or ranch store or stand, a roadside stall, a greenhouse ON A FARM, a U-Pick farm, or by the Internet or mail from a farm. [IF CSA1a=2 or CSA2a=2 READ/INCLUDE TEST: Farm Retail does not include CSAs or Box Programs.]

Overall would you say you: [READ LIST]

5. Know a lot about them
4. Know something about them
3. Know a little about them
2. Have heard of but know nothing about them [Go to FR15]
1. Have never heard of them [Go to FR15]
99. Don't know [Go to FR15]

FR2. In the past 12 months, that is **between November 2015 and October 2016**, did you or any member of your household PURCHASE these types of agriculture or food products directly from a farm in Alberta? [DO NOT READ LIST; ONLINE: PROVIDE RESPONSES]

1. Yes
2. No [Go to FR15]
99. Don't know [Go to FR15]

FR3. Did you purchase from a farm in Alberta during the.....

a. Out of season period (**from November 2015 to May 2016**)?

1. Yes
2. No
99. Don't know

b. In-season period (**from June 2016 to October 2016**)?

1. Yes
2. No
99. Don't know

[If FR3a AND FR3b=99 OR IF FR3A AND FR3B=2 SKIP to FR15]

FR4. [Ask if FR3a=1] During the out of season period, that is **from November 2015 to May 2016**, how many times did you and members of your household purchase agriculture or food products directly from a farm in Alberta? [RECORD NUMBER]

_______________ # TIMES DURING THE <u>OUT OF SEASON</u> PERIOD[RANGE =1-98]

FR5. [Ask if FR3a=1] Please think back to the <u>LAST</u> visit you made directly from a farm in Alberta **during the out of season period**. How much did you and members of your household spend in total? [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______________ $ SPENT IN YOUR LAST <u>OUT OF SEASON</u> VISIT [RANGE $1-9998]

FR6. [Ask if FR3a=1] How much of this amount was spent on FOOD grown or made in Alberta? For example, please exclude any food from BC or elsewhere, pet food and any non-food items. [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______________ $ SPENT ON THE LAST <u>OUT OF SEASON</u> VISIT [RANGE $1 to FR5i]

FR7. [Ask if FR3b=1] During the in-season period, **from June 2016 to October 2016**, how many times did you and members of your household purchase agriculture or food products directly from a farmer in Alberta? [RECORD NUMBER]

_______________ # TIMES DURING THE <u>IN-SEASON</u> PERIOD [RANGE =1-98]

FR8. [Ask if FR3b=1] Please think back to the <u>LAST</u> purchase you made directly from a farm in Alberta during the in-season period, **from June 2016 to October 2016**. How much did you and members of your household spend in total? [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______________ $ SPENT IN YOUR LAST <u>IN-SEASON</u> VISIT [RANGE $1-9998]

FR9. [Ask if FR3b=1] How much of this amount was spent on FOOD grown or made in Alberta? For example, please exclude any food from BC or elsewhere, pet food and any non-food items. [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______________ $ SPENT ON ALBERTA FOOD [RANGE $1 TO FR7i]

FR10. **In the next 12 months**, do you expect that you and members of your household will spend more, less or the same as last year on food purchased from farms in Alberta? [TELEPHONE: DO NOT READ LIST; ONLINE: PROVIDE RESPONSES]

1. More

2. Less
3. Same
98. No response
99. Don't know

FR11a. You and members of your household made [INSERT ANSWER FROM FR4, OR '0'] purchases directly from a farm during the last out of season period, **between November 2015 and May 2016**. How many times do you think you will go during the current out of season period, between November 2016 and May 2017? [RECORD NUMBER]

__________________ TOTAL EXPECTED VISITS DURING THIS OUT OF SEASON PERIOD

FR11b. When you go, do you think that you will spend more, less or the same PER VISIT?

1. More [Go to FR12a]
2. Less [Go to FR12a]
3. Same [Go to FR13a]
98. No response [Go to FR13a]
99. Don't know [Go to FR13a]

FR12a. How much [RECALL FR11b=1 (more) OR 2 (less)] do you think you and members of your household will spend PER VISIT? Please report this as a dollar amount. [IF FR11b=1 READ/INCLUDE TEXT: When reporting this amount, it should reflect additional spending above and beyond any increases you think will occur due to inflation.]

_________________ $ [RECALL FR11b=1 (more) OR 2 (less)] PER VISIT [Go to FR13a]
99. Don't know [GO TO FR12b]

FR12b. [Ask if FR11b=1 OR 2 and FR12a=99]Would you be able to report this as a percentage, as compared to previous spending?

1. Yes - _________________ % [RECALL FR11b=1 (more) OR 2 (less)] PER VISIT
99. Don't know

FR13a. You and members of your household made [INSERT SUM FROM FR7, OR '0'] purchases directly from a farm during this year's in-season period. How many times do you think you will go during the next in-season period, that is **between June 2017 and October 2017**? [RECORD NUMBER]

__________________ TOTAL EXPECTED VISITS NEXT IN-SEASON

FR13b. When you go, do you think that you will spend more, less or the same PER VISIT?

1. More [Go to FR14a]
2. Less [Go to FR14a]
3. Same [Go to FR15]
98. No response [Go to FR15]
99. Don't know [Go to FR15]

FR14a. How much [RECALL FR13b=1 (more) OR 2 (less)] do you think you and members of your household will spend PER VISIT? Please report this as a dollar amount. [IF FR13b=1 READ/INCLUDE TEXT: When reporting this amount, it should reflect additional spending above and beyond any increases you think will occur due to inflation.]

_________________ $ [RECALL FR13b=1 (more) OR 2 (less)] PER VISIT [Go to FR15]
99. Don't know [GO TO FR14b]

FR14b. [Ask if FR13b=1 OR 2 and FR14a=99] Would you be able to report this as a percentage, as compared to previous spending?

1. Yes - ________________ % [RECALL FR13b=1 (more) OR 2 (less)] PER VISIT
99. Don't know

FR15. If 0 means 'no chance' and 10 means 'certain', what number would you choose between 0 and 10 to describe how likely you and members of your household would be to PURCHASE these types of agriculture or food products directly from a farm in Alberta **in the next 12 months**? [DO NOT READ LIST; ONLINE: INCLUDE SCALE]

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

99. Don't know

[IF "0-5" OR 99, SKIP TO C1; OTHERWISE CONTINUE]

FR16. **In the next 12 months**, how many times do you think you and members of your household will PURCHASE these types of agriculture or food products directly from a farm in Alberta? [RECORD NUMBER]

________________ # Times

FR17. How far are you and members of your household willing to travel in order to purchase agriculture or food products directly from a farm in Alberta? [READ LIST]

1. Willing to travel within town/city limits ONLY (i.e., products brought by farmers and growers to local markets)
2. Willing to travel outside of city/town limits, but within a relatively close distance of city/town limits (i.e. within a 40 km radius of city/town limits)
3. Willing to travel well outside of city/town limits (farther than 40 kms outside of city/town limits)

98. No response
99. Don't know

CONTACT

C1. [Ask if FM2=1 or FR2=1] Which of the following forms of contact do you use with the farms or farmers' market vendors that you buy from? [READ THE LIST/PROVIDE RESPONSES [DO NOT RANDOMIZE ORDER]

1. Telephone
2. E-mail
3. Mail
4. Internet website
5. Blog
6. Facebook
7. Twitter
8. Instant messaging
9. Texting
10. In person

11. I do not contact farms or farmers' market vendors
12. Another form of contact? (specify): ____________________
99. Prefer not to answer

C2. [Ask if FM2=1 or FR2=1] Which ONE of the following forms of contact would you MOST prefer to use with the farms or farmers' market vendors to keep up to date with the activities and events at the farms that you buy from? [READ LIST/PROVIDE RESPONSES]

1. Telephone
2. E-mail
3. Mail
4. Internet website
5. Blog
6. Facebook
7. Twitter
8. Instant messaging
9. Texting
10. In person
11. Newspaper articles or advertisements
12. Another form of contact? (specify): ____________________

RESTAURANTS

[TELEPHONE: READ; ONLINE: PROVIDE TEXT] Some restaurants in Alberta serve locally grown food. Many advertise the sale of locally grown food in their restaurant.

R1. In the past 12 months, that is **between November 2015 and October 2016**, did you or any member of your household purchase food at ANY restaurant, hotel restaurant, diner, grill, pub, bistro, café, tea house, food truck, fast food chain, casino or other eating establishment?

1. Yes [Go to R2]
2. No [Go to CS1]
99. Don't know [Go to CS1]

R2. In the past 12 months, how many times did you and members of your household purchase food at ANY restaurant or other type of eating establishment (e.g. fast food chain, casino, take out, etc.) in Alberta? [RECORD NUMBER]

_______ # TIMES IN THE LAST 12 MONTHS (all restaurants) [RANGE=1-998]
99. Don't know

R3. Please think back to the LAST visit you made to a restaurant in Alberta. How much did you and members of your household spend on food (including alcohol)? This amount should be the total amount you and your household spent, regardless of the number of people being paid for, tip, etc.. [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

_______ $ SPENT ON FOOD IN THE LAST VISIT (all restaurants) [RANGE $1-9998]
99. Don't know

R4. In the past 12 months, did you or any member of your household deliberately choose to eat at a restaurant or other type of eating establishment in Alberta specifically because it served food prepared from ingredients that are grown or made in Alberta? [DO NOT READ LIST; ONLINE: PROVIDE RESPONSES]

1. Yes
2. No [Go to CS1]
99. Don't know [Go to CS1]

R5. In the past 12 months, how many times did you and members of your household choose to eat at a restaurant or other type of eating establishment in Alberta specifically because it served food prepared from ingredients that are grown or made in Alberta? [RECORD NUMBER]

_______ # TIMES IN THE LAST 12 MONTHS (Alberta ingredients) [RANGE= 1 TO R2]

R6. Please think back to the LAST visit you made to a restaurant or other type of eating establishment specifically because it served food prepared from ingredients that are grown or made in Alberta. How much did you and a member of your household spend? [TELEPHONE: ASK TO ESTIMATE IF CAN'T REMEMBER EXACTLY; ONLINE: INCLUDE TEXT 'Please estimate if you cannot remember exactly.']

________ $ SPENT IN THE LAST VISIT (Alberta Ingredients)[RANGE $1 TO R3]

R7. What was the name of the last restaurant or eating establishment you chose to eat at specifically for food prepared from ingredients that are grown or made in Alberta? PROBE: And where is... located? [TELEPHONE: ASK RESPONDENT TO SPELL AND TYPE IN]

__________ Restaurant name
99. Don't know
__________ Location (City/ Town)
99. Don't know

R8. Do you know how to find restaurants that serve locally-grown food?

1. Yes [Go to R8a]
2. No [Go to CS1]
99. Don't know [Go to CS1]

R8a. How do you find them? [RECORD VERBATIM RESPONSE]

99. Prefer not to answer

COMMERCIAL SOURCES OF LOCAL FOOD

[TELEPHONE: READ; ONLINE: PROVIDE TEXT] In addition to purchasing local food from famers' markets or directly from a farm, local food may be available through commercial food retailers such as grocery, convenience or specialty stores.

CS1. Please tell me whether you bought food grown or made in Alberta from the following types of outlets in the past 12 months? [TELEPHONE: READ LIST; ONLINE: INCLUDE TEXT 'PLEASE HOVER THE MOUSE OVER EACH TYPE OF OUTLET FOR A LIST OF EXAMPLES]

a. DRUG STORE For example: London Drugs, Shoppers Drug Mart or Rexall Drugs

1. Yes
2. No
99. Don't know

b. CONVENIENCE STORE For example: Mac's, 7-Eleven, Winks, Reddi Mart, Esso On the Run, Petro Canada Super Stop, Tags Food & Gas [DO NOT READ: others include Husky, Mohawk, Shell, Parkland Fas Gas and Turbo]

c. CLUB STORE For example: Costco, Real Canadian Wholesale Club, or The Grocery People Warehouse Market (TGP)

d. ETHNIC GROCERY STORE For example: T&T or another Asian store, The Italian Centre Shop or another Italian store, Turkish, Polish or other ethnicities

e. SMALL GROCERY STORE For example: Extra Foods, Shop Easy Foods, Super-Value Foods, Super-A Foods, Bigway Food, AG Foods or Giant Tiger

f. SUPERMARKET For example: Superstore, Safeway, Sobeys, Save-On-Foods, IGA, Co-op, No Frills, or a REGULAR Walmart store

g. MASS MERCHANDISER For example: a Walmart SUPERCENTRE

h. HEALTH FOOD, NATURAL OR ORGANIC FOOD STORE For example: Planet Organic, Amaranth Whole Foods, Blush Lane or Community Natural Foods [DO NOT READ: others include Homegrown Foods, Earth's General Store]

i. SPECIALTY STORE For example: a butcher, a bakery, a deli like Sunterra Market, The Cookbook Company Cooks, Sandy View Farms or Bite Groceteria, or an in-town produce store such as H&W Produce

j. Other (please specify) [RECORD VERBATIM RESPONSE]

CS2. Do you ever choose to shop at a specific retailer because they sell food grown or made in Alberta?

1. Yes
2. No
99. Don't know

CS3. Have you bought food grown or made in Alberta from either:

a. An on-line company representing a group of farms in Alberta that takes your order on the Internet and delivers to your home or a central location for you to pick up, such as SPUD, Green Earth Organics, The Organic Box, Organic Farm Directory or Rancho Vignola?

1. Yes
2. No
99. Don't know

b. A buying club, which is a group of people who get together to buy food grown or made in Alberta in bulk at a lower cost and then share the purchases made, such as Peacefull Pantry or Good Food Club.

1. Yes
2. No
99. Don't know

CS4. Other than the establishments that we have discussed in the previous two questions, at what OTHER types of outlets, if any, did you buy food grown or made in Alberta in the past 12 months?

____

99. None

CS5. Thinking about all of the places where you have purchased food grown or made in Alberta, where do you purchase from most often? [DO NOT READ LIST – CHOOSE THE ESTABLISHMENT NAMED FROM THE LIST BELOW; ONLINE: PROVIDE RECALLED RESPONSES]

[Recall CS1a-i=1]
[Recall CS3a-b=1]
[Recall FM2=1]
[Recall CSA2=1]
[Recall FR2=1]

CS6. [Ask if CS1a-i=1, CS3a-b=1, FM2=1, CSA2=1 OR FR2=1] In the next 12 months, do you expect that you will buy more, the same amount or less food grown or made in Alberta? [DO NOT READ LIST; ONLINE: PROVDE RESPONSES]

1. More
2. Same AMOUNT
3. Less
99. Don't know

CS7. [Ask if CS1a-i=2, CS3a-b=2, CS5=2, FM2=2, CSA2=2 AND FR2=2] **In the next 12 months**, do you intend to buy food grown or made in Alberta? [DO NOT READ LIST; ONLINE: PROVIDE RESPONSES]

1. Yes
2. No
99. Don't know

DEMOGRAPHICS

[TELEPHONE: READ; ONLINE: PROVIDE TEXT] Finally, there are a few questions about you and your household that will be used for statistical classification purposes only. Only aggregated responses will be used and published on the Agriculture and Forestry website.

D1. How many people, including yourself and any children or other adults, live in your household?

__________________ NUMBER IN HOUSEHOLD
98. No response

D2. [IF QD1=1, surveyor should confirm that there are no children in the household and then select response "No children in household"] How old is the youngest child living in your household? [READ LIST; ONLINE: PROVIDE RESPONSES]

1. Up to 5 years
2. 6 to 12 years
3. 13 to 17 years
4. 18 or older
5. No children in household
98. No response
99. Don't know

D3. Do you live on a farm or ranch? [DO NOT READ LIST; ONLINE: PROVIDE RESPONSES]

1. Yes
2. No
98. No response

99. Don't know

D4. [TELEPHONE] Please tell me when I read out your age group [READ LIST] [ONLINE] Please select your age group [PROVIDE REPSONSES].

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65 and over
98. No response

D5. What is the highest level of education you have completed to date: [READ LIST; ONLINE: PROVIDE REPSONSES]

1. Less than high school
2. Graduated high school
3. Some commercial, technical or vocational college or trade certificate
4. Graduated commercial, technical or vocational college or trade certificate
5. Some University
6. Completed University
7. Postgraduate
98. No response

D6. Which of the following best describes your marital status? Are you: [READ LIST; ONLINE: PROVIDE RESPONSES]

1. Single, that is never married
2. Married or living together as a couple
3. Widowed
4. Separated
5. Divorced
98. No response

D7. What is your TOTAL household income, before taxes and other deductions.....? [READ LIST; ONLINE: PROVIDE RESPONSES]

1. Under $50,000
2. $50,000 to $80,000
3. $80,001 to $120,000
4. Over $120,000
98. No response

D8. Gender [TELEPHONE: RECORD GENDER BY OBSERVATION – DO NOT READ LIST; ONLINE: PROVIDE LIST]

1. MALE
2. FEMALE

D9a. To thank you for participating, we are offering to enter you into a draw for a prize of one $300 pre-paid Visa credit card. Would you like to be entered into the draw?

1. Yes [Go to D9b]
2. No [Go to End]

D9b. We need to collect some information about you so we can contact you if you win the prize. Your contact information will be held in the strictest of confidence.

Name: ____________

Phone number: ________

Address: __________

Email address: __________

[TELEPHONE: READ / ONLINE: TEXT] On behalf of Malatest and Alberta Agriculture and Forestry, thank you for taking the time to answer these questions to improve their services to you.

Appendix B: Call Dispositions

Call Outcome	Full Sample
Total Numbers Attempted	**25,357**
Invalid Sample	
Not in service, fax/modem, business/non-residential/dialer returns	9,545
Unresolved (U)	
Busy, no answer, answering machine	7,699
In-scope – Non-Responding (IS)	
Language barrier	129
Illness, incapable	27
Selected respondent not available	731
Household refusal	496
Respondent refusal	5,384
Qualified respondent break-off	30
In-scope – Responding Units (R)	
Language disqualify	-
No one 18+	11
Other disqualify – Cannot speak to household head/qualified household head	16
– Makes commercial purchasing decisions	73
– Lives in a seniors' home, does not purchase food	16
Completed surveys	1,200
Response Rate = R/(U+IS+R)	**8.3%**
Co-operational Rate = R/Total asked	**14.8%**

Appendix C: Market Profiles

	Total Sample			Farmers' Market			Farm Retail			CSA		Restaurants for AB ingredients		Food grown or made in AB	
	2008 wn=1015 un=1068	2012 wn=1000 un=1058	2016 wn=1200 un=1200	2008 n=604	2012 n=752	2016 n=938	2008 n=309	2012 n=274	2016 n=426	2012 n=17	2016 n=62	2012 n=221	2016 n=279	2012 n=931	2016 n=1184
Gender															
Male	41	38	37	39	37	37	41	35	38	39	28	32	29	38	37
Female	59	62	63	61	63	63	59	65	62	61	72	68	71	63	63
Household life stage*															
Young single/couple	-	-	4	-	-	3	-	-	3	-	4	-	3	-	4
Young family	-	-	3	-	-	4	-	-	5	-	7	-	3	-	3
Older family	-	-	26	-	-	24	-	-	27	-	27	-	25	-	25
Empty nesters	-	-	10	-	-	11	-	-	9	-	13	-	12	-	10
Older single	-	-	55	-	-	56	-	-	53	-	49	-	54	-	55
Refused	-	-	3	-	-	3	-	-	4	-	-	-	4	-	3
Household size															
Average size	2.76	2.63	2.76	2.82	2.69	2.72	2.94	2.89	2.86	3.39	3.04	2.70	2.73	2.64	2.75
Age															
18 – 24	2	2	1	2	1	1	3	2	1	-	1	2	1	2	1
25 – 34	12	11	6	12	11	6	9	9	6	22	10	12	5	11	6
35 – 44	21	18	15	20	19	13	23	20	15	27	20	22	15	19	14
45 – 54	26	25	23	28	28	22	27	32	24	17	21	30	25	26	23
55 – 64	20	24	26	19	26	27	21	23	25	28	28	23	25	24	26
65 and over	18	20	29	18	15	29	17	14	28	5	20	12	28	19	29
Refused	1	-	1	1	-	1	+	-	1	-	-	-	1	-	1
Marital status															
Single	11	12	10	9	10	9	10	10	7	6	9	11	7	11	10
Married/couple	70	70	72	74	72	74	74	7	79	72	83	72	75	70	72
Widowed	6	8	7	6	7	7	6	6	6	5	5	7	6	8	7
Separated	3	3	2	1	3	2	2	5	2	-	4	2	1	3	2
Divorced	9	8	8	9	8	7	7	8	5	17	-	9	7	8	7
Refused	2	-	2	1	-	2	1	-	3	-	-	-	3	-	2
Education															
Less than high school	7	5	4	5	3	4	5	3	2	6	3	3	2	4	4
High school/some post-secondary	35	30	31	34	29	31	35	30	31	11	26	23	17	30	31
College trade	22	22	17	23	21	17	23	19	16	22	10	23	6	21	17
University degree	34	43	47	37	47	48	36	48	49	61	61	51	36	45	47
Refused	2	-	2	1	-	2	1	-	1	-	-	-	14	-	1
Household income*															
Under $50,000	-	-	13	-	-	13	-	-	11	-	8	-	8	-	13
$50,000 to $80,000	-	-	15	-	-	14	-	-	11	-	13	-	13	-	15
$80,001 to $120,000	-	-	17	-	-	17	-	-	1	-	18	-	20	-	17
Over $120,000	-	-	23	-	-	25	-	-	27	-	40	-	24	-	23
Refused	-	-	32	-	-	31	-	-	34	-	21	-	36	-	32

	Total Sample			Farmers' Market			Farm Retail			CSA		Restaurants for AB ingredients		Food grown or made in AB	
	2008 wn=1015 un=1068	2012 wn=1000 un=1058	2016 wn=1200 un=1200	2008 n=604	2012 n=752	2016 n=938	2008 n=309	2012 n=274	2016 n=426	2012 n=17	2016 n=62	2012 n=221	2016 n=279	2012 n=931	2016 n=1184
Region															
Edmonton CMA	32	32	33	31	32	33	30	28	29	56	25	29	29	31	33
Calgary CMA	33	33	33	35	34	33	25	29	25	27	30	38	32	33	33
Other urban	10	10	11	9	10	11	10	10	12	-	7	7	11	10	11
Rural	26	25	24	25	24	24	35	33	35	17	39	26	28	26	24
Community size*															
City of Edmonton	23	23	24	23	22	24	22	18	20	56	17	19	20	22	24
City of Calgary	31	30	31	34	32	30	24	27	22	27	29	35	30	31	30
Edmonton area	-	-	9	-	-	9	-	-	8	-	8	-	9	-	9
Calgary area	-	-	3	-	-	3	-	-	3	-	1	-	3	-	3
Other urban	-	-	11	-	-	11	-	-	12	-	7	-	11	-	11
Rural	-	-	24	-	-	24	-	-	36	-	39	-	28	-	24
Farm/ranch	9	9	8	8	9	8	13	14	12	6	13	10	8	9	8

*Note: categories were different in 2016 compared to previous years.