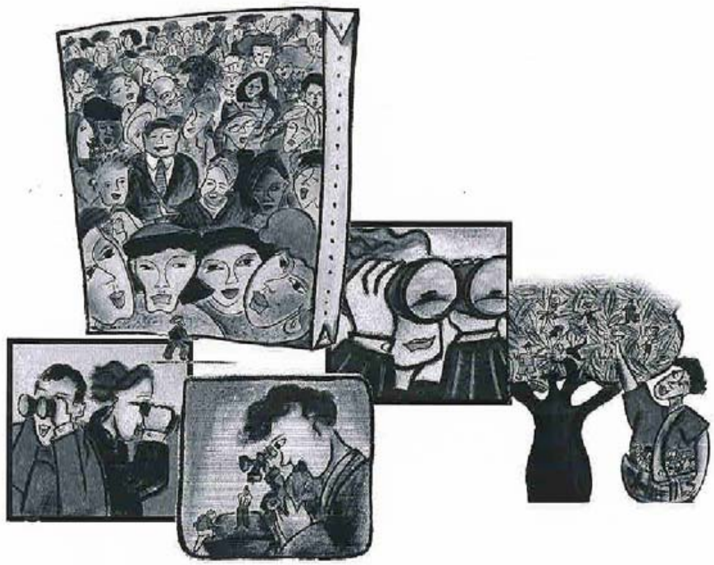

2005 Atlantic Canada Food Consumer Study

THE COUNCIL OF ATLANTIC PREMIERS
LE CONSEIL DES PREMIERS MINISTRES DE L'ATLANTIQUE

CORPORATE RESEARCH ASSOCIATES INC

Atlantic Canada Food Consumer Study

Prepared for:

Council of Atlantic Premiers

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Corporate Research Associates Inc

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Introduction

This report presents the results of the **2005 Atlantic Canada Food Consumer Study**, conducted by Corporate Research Associates Inc. (CRA) on behalf of the Council of Atlantic Premiers (CAP).

The Council of Atlantic Premiers was formed in 2002 with the primary objectives of strengthening the region's economic competitiveness, improving the quality of public services, and improving the cost-effectiveness of delivering public services to the region. CRA was commissioned by CAP to better understand the attitudes, perceptions, and purchasing practices of Atlantic Canadian food consumers. More specifically, this study seeks to:

- Provide information about the Atlantic Canadian food consumer with respect to knowledge, attitudes, and purchasing in relation to the Atlantic Canadian food industry;
- Provide information that will enhance the development of future Atlantic Canada promotional activities; and
- Provide key conclusions and recommendations derived from analysis of research findings that will form the basis for future promotional campaigns on both an Atlantic Canadian level and within individual provinces.

The **2005 Atlantic Canada Food Consumer Study** is based on telephone interviews conducted with Atlantic Canadians who are the primary grocery shoppers for their household. A total of 1602 interviews were completed with a representative sample of adult Atlantic Canada residents. Four hundred interviews were conducted in New Brunswick, and Nova Scotia, while 401 interviews were conducted in Newfoundland and Labrador and Prince Edward Island. The survey was conducted by telephone from February 14 to March 26, 2005 from Corporate Research Associates' data collection facilities.

A random sample of 1602 general public interviews drawn from the adult population of Atlantic Canada would be expected to provide results accurate to within +/- 2.4 percentage points in 19 out of 20 samples. For each of the four Atlantic Provinces, a random sample of 400 or 401 general public interviews would be expected to provide results accurate to within +/- 4.9 percentage points in 19 out of 20 samples. A more complete description of the methodology used to conduct this study is provided at the back of this report.

The **2005 Atlantic Canada Food Consumer Study** includes results for five unique segments of the population. These segments were identified through use of a cluster analysis by grouping respondents according to similarities on certain variables—in this case age and household income. The largest segments in Atlantic Canada are Sustainers (26%), followed by Strivers (25%), Pensioners (21%), Affluents (14%), and Daily Grinders (14%).

Daily Grinders are those under the age of 55 who earn less than $25,000 annually. Strivers are those under 35 years of age who earn at least $25,000 per year, or are aged 35 to 44 and earn at least $75,000 per year. Sustainers are 35 to 54 years of age with annual incomes of at least $25,000 and less than $75,000. Affluents are aged 45 to 54 with annual incomes of at least $75,000, or over 54 years of age with an annual income of at least $50,000. Pensioners are over 54 years of age and earn less than $50,000.

Executive Summary

Results from the 2005 **Atlantic Canada Food Consumer Study** suggest that Atlantic Canadian grocery shoppers are willing to consider locally produced food products when shopping for groceries, and for selected items, indeed are already loyal consumers. These primary grocery shoppers also feel quite comfortable purchasing the same brands virtually every time they shop for groceries. Thus, any promotions of locally produced food products require compelling arguments to convince consumers to alter engrained purchase behaviours.

It is further evident from the study that the major regional grocery retailers, namely Sobeys and Loblaws, are required partners for initiatives developed to encourage the purchase of local food products. These two retail giants control a significant amount of food distribution, and the study results also clearly indicate these companies wield considerable influence on the purchase behaviour of grocery shoppers. This is especially true in regards to their own in-store brands. For example, grocery store flyers and in-store specials were identified in the survey results as being most effective at convincing grocery shoppers to purchase food items they normally would not buy.

Presently, knowledge that an item is locally produced by itself is not a sufficiently compelling reason for consumers to purchase the product. These purchasers need to be reassured that a locally produced food product is as good as, or better than, what they are currently buying in terms of taste and quality. In addition, pricing should be at least comparable to food products produced elsewhere. The nutritional value of local foods is another important communications and marketing consideration. On a related matter, a significant minority of primary grocery shoppers believe products grown locally utilize fewer chemicals or pesticide sprays as compared to products grown elsewhere, suggesting another marketing opportunity.

Consumers currently experience a measure of difficulty in identifying locally produced food products. On a related matter, when asked to specify what the expression “local food product” means to them in terms of the geographic origin of a food item, consumers are most likely to link the term to their own province, or indeed even to their local county or immediate geographic area. Grocery shoppers are less likely to consider local products to be from the broader geographic region of Atlantic Canada (or the Maritime Provinces).

Finally, it is important to recall that consumers become comfortable with the products and brands they seemingly purchase habitually, in the process developing well-ingrained buying behaviours. While this inclination is deeply-embedded among consumers, the present survey results suggest primary grocery shoppers in Atlantic Canada nonetheless are willing to consider purchasing local food products, indeed even if they sometimes are marginally more expensive than their regular brands. However, it is pivotal to note that consumers are less likely to choose a local product if it is perceived to be of lower quality than their regular or favourite brand.

Conclusions

- ***While being locally produced is not as important as taste and quality in grocery shoppers' food purchase decisions, it is a significant consideration for a segment of the population.***

  Atlantic Canadian primary grocery shoppers tend to stay in their comfort zone when they shop, preferring to purchase the same brands of products each time they shop. As well, taste and product quality are identified in an unaided fashion as the most important factors when purchasing fresh vegetables. Similarly, when asked to assess an aided series of purchase decision factors, residents are most likely to rate taste and quality as being critically important. Only two in ten consider being locally produced to be a critically important factor in their food purchase decisions.

- ***Grocery shoppers express a willingness to consider local food products over their regular brands, and local farmers are identified as the most credible group to endorse or promote local food products.***

  It is well-known but important to recall that consumers become comfortable with the products and brands they purchase on a repeated basis, in the process developing well-ingrained buying behaviours or habits. While this inclination is well-embedded among consumers, the present survey results suggest primary grocery shoppers in Atlantic Canada nonetheless are willing to consider purchasing local food products, indeed even if they are somewhat more expensive than their regular brands. However, it is pivotal to note that consumers are less likely to choose a local product if it is perceived to be of lower quality than their regular or favourite brand.

  Local farmers are identified most frequently as credible spokespersons to promote or endorse local food products. Just over four in ten primary grocery shoppers indicate promotion or endorsement of local products by local farmers would influence them to purchase local food products. Close to three in ten view grocery stores as credible endorsers, while two in ten would pay attention to a health expert or doctor.

- ***The study illustrates the strong position of Sobeys and Loblaws, a finding that would affect strategies to promote local products.***

  It is indeed a fact that the vast majority of primary grocery shoppers name Sobeys or a Loblaws store as the grocery retailer they visit most frequently. As such, these two grocery store chains wield considerable control over the distribution of food products in Atlantic Canada, and both have their own privately-branded product lines. Moreover, it also is evident that grocery retailers have the greatest influence in terms of persuading shoppers to purchase food items they ordinarily would not buy. Specifically, primary grocery shoppers state in-store specials and grocery flyers have significant influence in terms of prompting them to try new or different food products.

- ***Consumers may not have sufficient information at their disposal to make a clear distinction between local and non-local food products, and no single compelling descriptor emerges as a top-of-mind association with the term "local food products."***

  Notably, a large number of primary grocery shoppers have difficulty identifying local food products, with a lack of information to make such a "local/non-local" distinction being the underlying reason for this inability. Unaided perceptions of local food products are limited, with two in ten primary grocery shoppers stating local products are grown in their province, are high quality, or are fresh. When asked specifically about the origin of local food products, most primary grocery shoppers associate local products with being from their local area or from their province, and are less likely to assign the more broad geographic area of Atlantic Canada or the Maritimes. Labels and in-store signage are the two most important sources of information about the provenance of local food products.

- ***Shoppers are well aware of the contribution of local products to their provincial economy, a finding that could be useful in communications strategies promoting local food products.***

  A strong majority of primary grocery shoppers identify supporting the local economy as a key benefit of purchasing local food products. This finding could prove useful in future marketing efforts to promote local food products, as the public already is well-disposed toward or cognizant of this implication of local food production. Unfortunately, freshness and quality do not emerge unaided as key benefits of local food products, so more efforts would be needed to achieve improvements in public perceptions along these dimensions. That is, there is not a ready inclination on the part of consumers to strongly "top of mind" associate local food products with freshness and quality.

- ***Taste, and to a lesser extent, nutritional value and being grown in an environmentally responsible manner emerge as comparative strengths, or differentiators, of locally produced items.***

  When asked to compare locally produced foods to those grown or produced elsewhere across a range of evaluation criteria, consumers are most likely to consider locally produced products to be better in terms of taste, followed by being grown in an environmentally responsible fashion, and nutritional content. Primary grocery shoppers are less likely to assess local products as better than those produced elsewhere in terms of price, having environmentally friendly packaging, or having visually appealing packaging.

- ***Locally produced foods receive a moderately positive assessment in terms of use of chemicals and pesticides.***

  A significant minority of primary grocery shoppers believe products grown locally use fewer chemicals or pesticide sprays compared with products grown elsewhere. The lack of bio-solid fertilizers is viewed favourably. In terms of BSE, Atlantic Canadians express a moderate amount of concern about the safety of beef sold in the region.

- ***Top-of-mind, consumers tend to think of certain product lines or food categories (e.g., fresh vegetables) as desirable locally grown or produced items.***

  Fresh vegetables are the most popular local food category, with eight in ten of those surveyed stating they typically look for locally produced fresh vegetables when they shop for groceries. Those categories where shoppers are least likely to look for local products include beef, packaged frozen fish, frozen vegetables, juice, packaged cookies and crackers (with the notable exception of Newfoundland and Labrador), canned goods, and frozen prepared foods. Availability is cited most frequently as the reason why consumers do not purchase locally produced food products, followed by cost.

Recommendations

1. **Governments should partner with grocery retailers and local farmers to successfully promote local food products to Atlantic Canadians.**

   Consumers are most likely to identify grocery flyers or in-store information as influential in persuading them to purchase food products they normally would not buy. In addition, the two major grocery retail companies (i.e., Sobeys, Loblaws) control much of the distribution of food products in Atlantic Canada, and indeed these companies have considerable investments in their own in-store private brands. Nonetheless, there may be a willingness on their part to work together with governments to promote local food products. As well, with farmers being chosen most frequently as appropriate spokespersons to endorse local products, it is important that they are included in any promotional programs undertaken by governments or grocery retailers. Utilizing local farmers in such a fashion would also emphasize the direct relationship between local products and the local economy.

2. **Strategies promoting local products should address consumers' dispositions in favour of their "regular" brands, and offer compelling reasons to change established purchase behaviours. That is, marketing efforts should emphasize strengths and intrinsic points of differentiation between local and non-local food products, such as freshness.**

   This recommendation is derived from the research which suggests that a clear understanding of consumer motivations is fundamental to the success of marketing initiatives that would trumpet local food products. Consumers identify taste and quality as important food product features, and do not consider product or item origin to be very important in food purchase decisions. By itself, being locally produced does not offer consumers a sufficiently compelling reason to purchase local products.

   Taste and quality, therefore, are essential marketing elements, as is availability. Consumers need to be persuaded that local food products are as good as or better than those produced elsewhere, and that availability is not an issue. Freshness is an important quality directly related to the perceived quality of local food products, and is a feature that can positively differentiate local products from those produced elsewhere. Such intrinsic differentiators must be identified and exploited.

   As well, it is important to focus on the overall nutritional quality of locally produced foods. However, it is not necessary to promote locally produced foods as part of low fat or low carbohydrate diets, given the relatively low incidence of these types of diets in the region. Local foods' contribution to the local or regional economy is also an important communications or marketing consideration, although it is secondary in importance to taste and quality.

3. **A brand strategy for local food products should be developed as a means of enhancing the relative position of local food products in the marketplace.**

   Primary grocery shoppers have stated they tend to purchase the same brands each time they shop for groceries. This behaviour is in line with consumer behaviour for virtually any product or service line, beyond the domain of groceries. While the tendency or inclination to be brand loyal is deeply-embedded among Atlantic Canadian grocery shoppers, the present survey results suggest consumers nonetheless are willing to consider purchasing local food products. That is, there is considerable opportunity to successfully market local products within the region.

   Accordingly, a brand strategy should be developed to make it easier for consumers to understand local food products. Indeed, at a very basic level, there is a need to make it easier for consumers to identify locally produced products in the stores, and this information must be readily available to consumers where they shop. For example, an easily recognized symbol or logo should be developed and consistently utilized for packaging, store signage, and promotions.

   This brand strategy would involve, among other things, trusted spokespersons such as the farmers mentioned above, a logo or symbol that both represents the strengths of local food products and makes it easy for consumers to identify them in the stores, with the rudiments of the brand strategy being those pivotal purchase motivators and differentiators that consumers identified in the current study, such as freshness.

4. **Any promotional strategies concerning local food products should equate "local" with provincially produced food items.**

   Consumers are most likely to associate local products with their own province or indeed even within the county or areas nearby where they live. In contrast, only a small minority consider local products to be from beyond their provincial boundaries, even though their origin might be another Atlantic Province. As such, there is a stronger link between provincially produced products, and the notion that the product is "local." This consumer disposition is both understandable and embedded, and should be respected in terms of marketing strategies developed to promote "local" food products.

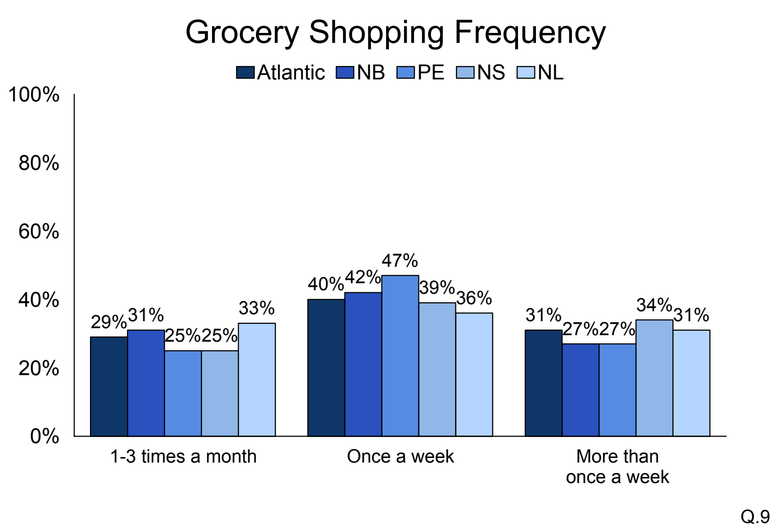
Detailed Analysis

Grocery Shopping Practices

The study illustrates the strong position of two grocery retailers – Sobeys and Loblaws – in Atlantic Canada, a finding that would affect strategies to promote local products.

Grocery Shopping Frequency

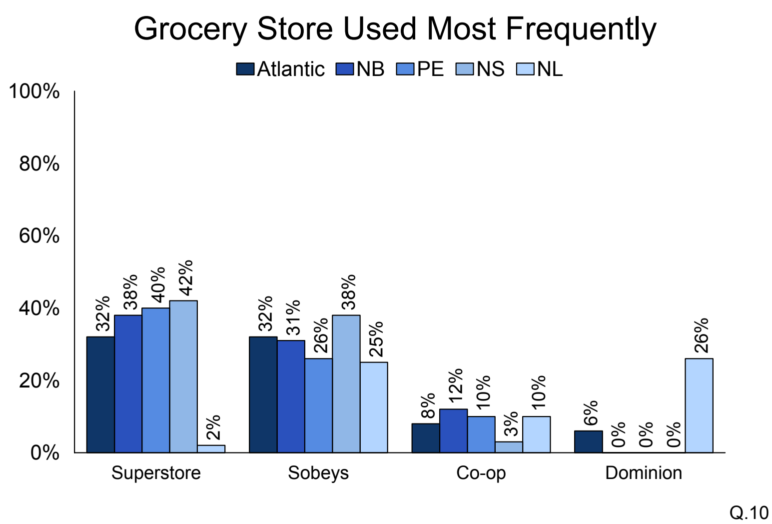
When asked how frequently they shop for groceries, three in ten Atlantic Canadians report shopping at least five times per month, while four in ten shop four times per month. Nearly three in ten shop less frequently, and report going grocery shopping between once and three times each month. On average, Atlantic Canadians shop for groceries five times a month. Nova Scotians shop most frequently (5.5 times per month), while residents of the remaining three provinces shop an average of five times per month. (Table 9)



Across the population, those most likely to report shopping for groceries at least five times each month include men, residents in the middle- and upper-income brackets, older residents, and those with as least some post secondary education. Examining the demographic segments, Affluents are the most frequent grocery shoppers, averaging 6.4 trips to grocery shop each month.

Grocery Store Used Most Frequently

Sobeys and the Superstore (and in Newfoundland and Labrador, the Loblaws-owned Dominion) are the two most frequently named grocery stores used by Atlantic Canadian primary grocery shoppers, with approximately three in ten of those surveyed naming each of these two grocery chains. As illustrated by the following graph, grocery store use varies by province, and is based on the grocery stores available in each province. (Table 10)



Location is the most common reason why residents shop at their preferred grocery store, followed by prices and product selection. No other reason is offered by more than 8 percent of those surveyed. Regionally, residents of Nova Scotia are more likely than other Atlantic Canadians to cite location as a determining factor. Islanders, meanwhile, are more likely than others to indicate product selection is a key reason why they shop at their preferred grocery store. Residents of Newfoundland and Labrador are less likely than others to cite prices, product selection, or store layout as reasons for their grocery store preference. (Table 11)

Main Reason For Shopping at Preferred Grocery Store (Key Mentions)

	Overall %	NB %	PE %	NS %	NL %
Location	38	33	38	43	35
Prices	33	36	35	33	27
Product selection	21	18	32	26	10
Quality of produce/meat/baked goods	8	7	10	9	9
Store layout	8	8	8	10	2
Customer incentive programs	6	6	6	6	9
Have always shopped there/Habit	6	8	6	4	7
Staff/employees	5	4	6	6	4
Store size	3	4	4	3	1

Examining reasons why residents chose the top two grocery stores mentioned – Sobeys and Superstore – several differences are observed. Those who shop at the Superstore are more likely than those who shop at Sobeys to cite prices and product selection, while Sobeys shoppers are more likely to identify location and customer incentive programs as reasons why they shop at their preferred grocery store.

Across the population, those most likely to name location include men, higher income earners, those under 55 years of age, residents with at least some post-secondary education, and those with no children in their household. Those most apt to cite prices include women, residents in the lower-income bracket, those who have not completed high school, and residents with children living in their household. These latter residents, as well as higher income earners and those under 55 years of age are also more apt than others to identify product selection as a reason for shopping at their preferred grocery store.

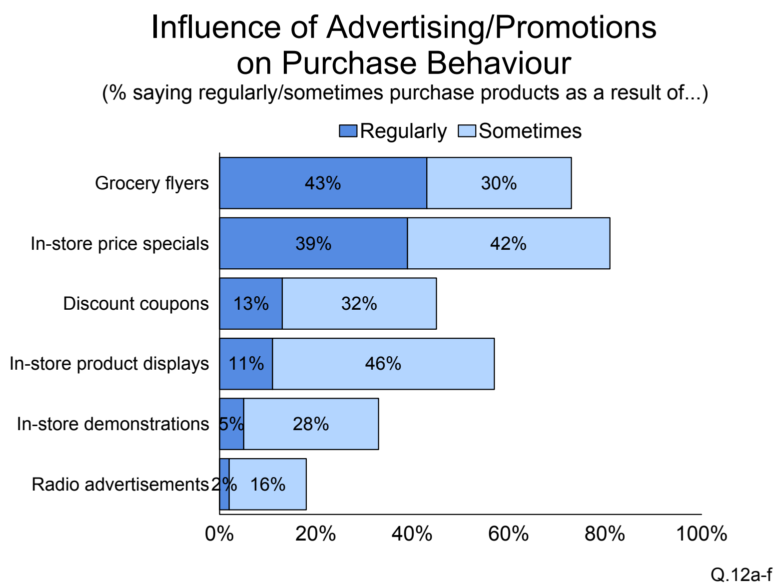
Examining the demographic segments, location, prices, and product selection are the top three reasons why each segment shops at their preferred grocery store.

Influences on Grocery Purchase Decisions

Advertising/Promotions

Grocery retailers have the greatest influence on persuading shoppers to purchase food items they ordinarily would not purchase.

Promotional activities initiated by grocery stores have the greatest influence on primary grocery shoppers' purchase behaviour. Eight in ten state they regularly or sometimes purchase food products they normally would not purchase as a result in-store price specials, while three-quarters state grocery flyers influence their purchase behaviour. Close to six in ten are influenced by in-store product displays, while close to one-half purchase products they normally would not purchase as a result of discount coupons. Residents are considerably less likely to be influenced by in-store demonstrations or radio advertisements. (Tables 12a-12f)



Influence of Advertising/Promotions on Purchase Behaviour
(% saying they regularly/sometimes purchase products they would not otherwise purchase because of specific advertising/promotion)

	Overall %	NB %	PE %	NS %	NL %
In-store price specials	81	82	82	77	84
Grocery flyers	73	71	73	74	76
In-store product displays	57	61	57	53	58
Discount coupons	45	46	43	45	45
In-store demonstrations	33	36	26	30	36
Radio advertisements	18	16	16	18	22

The following is an analysis of differences between the various population subgroups:

In-store price specials: Nova Scotians are less likely than other Atlantic Canadians to be influenced by in-store price specials. Residents with children living at home are more apt than those with no children to report being influenced by in-store price specials. Results are generally consistent across the demographic segments.

Grocery flyers: New Brunswickers are least likely, while residents of Newfoundland and Labrador are most likely to be influenced by grocery flyers. Women, lower income earners, residents with a high school or lower level of education, and those with children living at home are more likely than others to be influenced by grocery flyers. Sustainers and Pensioners are most likely, while Affluents are least likely to state they regularly or sometimes purchase products they normally would not as a result of grocery flyers.

In-store product displays: Nova Scotians are somewhat less likely than other residents to be influenced by in-store product displays. Upper-income earners, residents who have not completed high school, and those with children living at home are most apt to state they are influenced by in-store product displays. Daily Grinders are considerably more likely than other segments to respond to in-store displays.

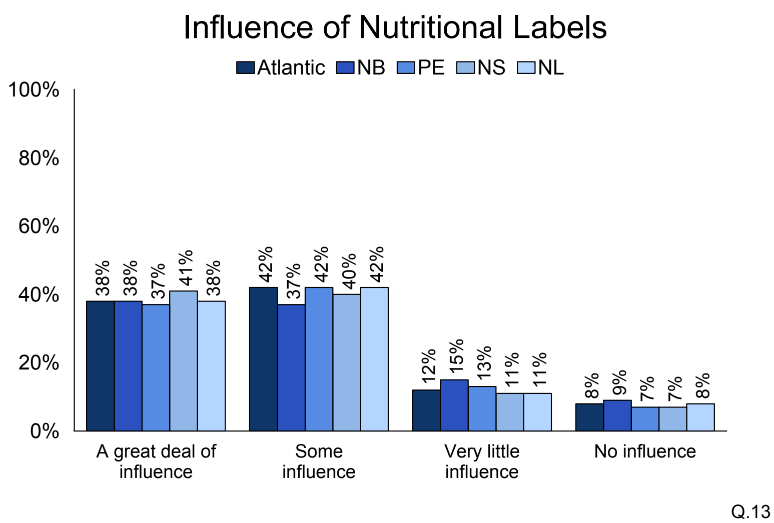
Discount coupons: Results are generally consistent across the region. Those most likely to report being influenced by discount coupons include women, lower income earners, those with a high school or lower level of education, and residents with children at home. Affluents are less apt than other segments to be influenced by discount coupons.

In-store demonstrations: Residents of Prince Edward Island and Nova Scotia are less likely than those who live in New Brunswick and Newfoundland and Labrador to be influenced by in-store demonstrations. Those most likely to state they regularly or sometimes purchase food products they normally would not purchase as a result of in-store demonstrations includes women, residents aged 35 to 54 years, those who have not completed high school, and residents with children living in their household. Affluents are less likely than other segments to be persuaded by in-store demonstrations.

Radio advertisements: Residents of Newfoundland and Labrador are most likely to be influenced by radio advertisements. Those most likely to be persuaded to purchase different products as a result of radio advertisements include lower income earners, those under 55 years of age, residents who have not completed high school, and those who have children living in their household. Daily Grinders and Sustainers are slightly more likely than other segments to be influenced by radio advertisements.

Nutritional Labels

Most Atlantic Canadians report their food product purchase behaviour is influenced by nutritional labels. Four in ten report nutritional labels have a great deal of influence, and a similar number state these labels have some influence on the food products they purchase. Two in ten indicate nutritional labels have little or no influence on their purchase behaviour. Results are generally consistent across the region, although New Brunswick residents are slightly less likely than others to state they are not influenced by nutritional labels. (Table 13)

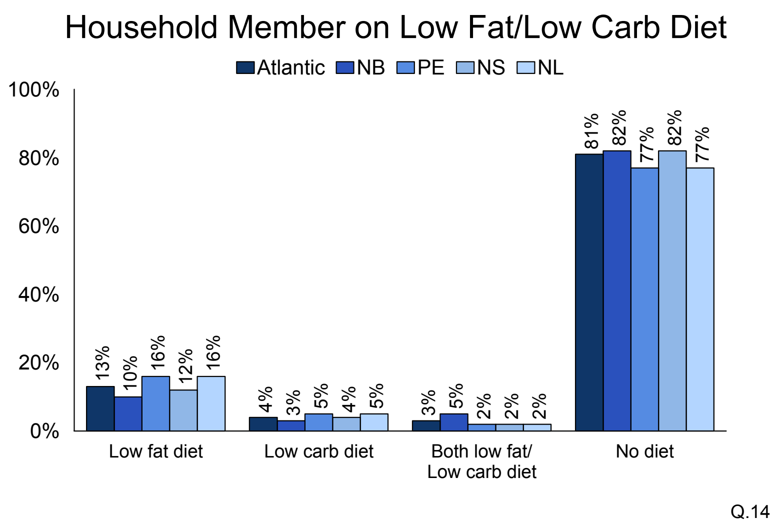


Across the population, those most likely to state nutritional labels have a great deal of influence on their food product purchase behaviour include women, higher income earners, those who have completed a post secondary degree or diploma, and residents with no children at home. Residents who have not completed high school are least likely to state nutritional labels have a great deal of influence on their purchase behaviour.

Among the demographic segments, Affluents and Strivers are most likely to state nutritional labels have a great deal of influence on the food products they purchase. Daily Grinders are least likely to be influenced by nutritional labels.

Diet

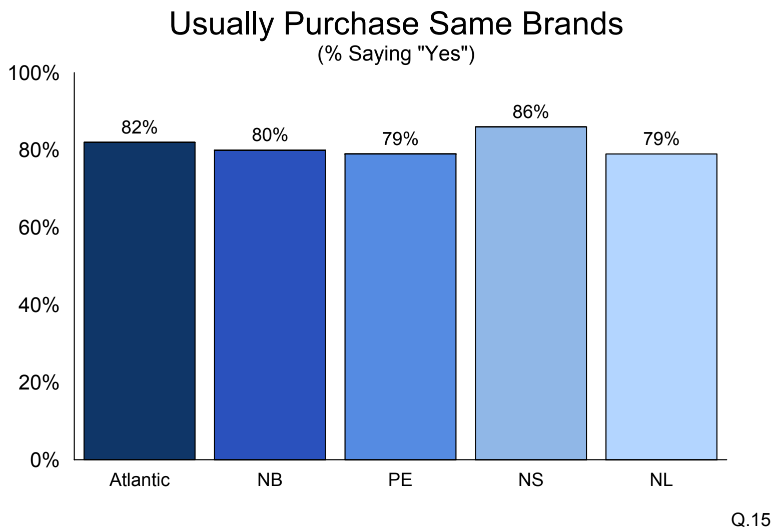
The vast majority of those surveyed report neither they nor any member of their household is currently following a low fat or low carbohydrate regimen. Slightly more than one in ten of those surveyed report they or someone in their household is on a low fat diet, while few state they or a household member is on a low carbohydrate diet or a low fat/low carbohydrate diet. Regionally, residents of Prince Edward Island and Newfoundland and Labrador are most apt to report they or a member of their household is presently on a low fat or low carbohydrate diet. (Table 14)



Across the population, older residents and those with no children at home are more likely than others to report they or a member of their household is currently following a low fat regimen. Among the demographic segments, Pensioners and Affluents are most likely to have a household member on a low fat diet. Affluents are also most likely to have a household member following a low carbohydrate regimen.

Brand

Atlantic Canadians, particularly Nova Scotians, are quite loyal to their preferred brands, and most report they usually purchase the same brand of a specific food when they shop for groceries. (Table 15)

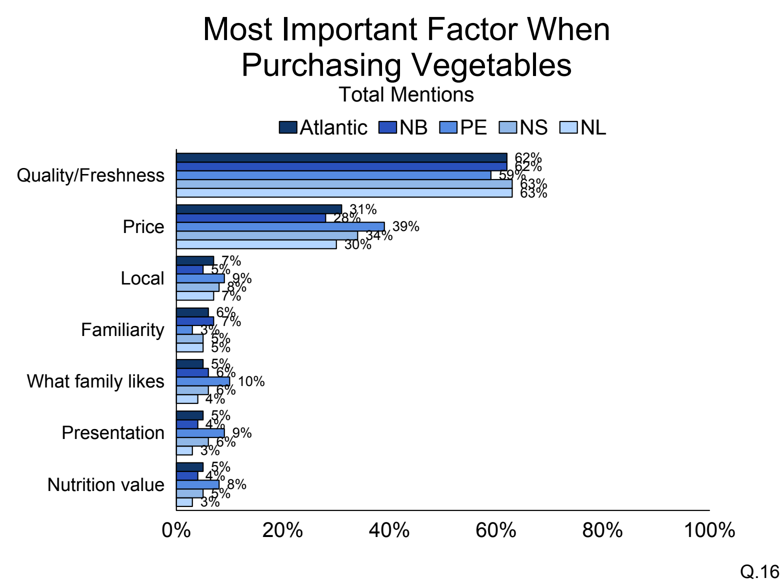


Across the population, those most likely to habitually purchase the same brands include women, higher income earners, and residents with children living in their household. Among the demographic segments, Strivers and Sustainers are most likely to state they tend to purchase the same brands.

Importance of Factors to Grocery Purchase Decision

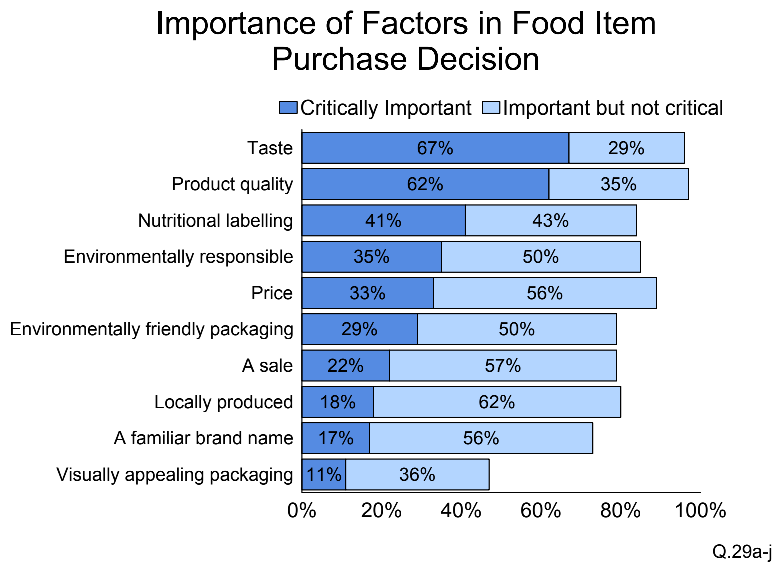
While being locally produced is not as important as taste and quality in grocery shoppers' food purchase decisions, it is a significant consideration for a segment of the population.

When asked to name important factors specific to their purchase of vegetables when shopping at a grocery store, quality is the most popular response, followed somewhat distantly by price. No other factor is named by more than 7 percent of those surveyed. Residents of Prince Edward Island are slightly less likely than other Atlantic Canadians to consider quality to be important, and more likely to identify price as an important consideration. (Table 16)



Across the population, residents in the middle- and upper-income bracket are more likely than lower income earners to name quality. Those primary grocery shoppers who have not completed high school are less likely than those with higher levels of education to name either quality or price, and are less apt to offer a definite opinion in general. Those most likely to identify price as an important factor include younger residents and those with children in their household. Among the demographic segments, Daily Grinders are least likely, while Affluents and Sustainers are most likely to state quality is the most important factor when purchasing vegetables at a grocery store. Daily Grinders and Sustainers are more likely than other segments to identify price as an important factor, while Affluents and Daily Grinders are slightly more likely than others to indicate local production is an important consideration.

With the exception of visually appealing packaging, at least three-quarters of those surveyed consider each of a series of factors to be important when deciding which food items to purchase. Looking specifically at those who consider a factor to be critically important, taste and product quality are the two most important considerations. Other important factors include nutritional labelling, knowing the product was grown or produced in a way that did not harm the environment, price, and environmentally friendly packaging. Least important are whether the food item is on sale, whether the item was locally produced, a familiar brand name, and visually appealing packaging. (Tables 29a-29j)



Some differences are observed when comparing provincial results. Residents of Prince Edward Island and Newfoundland and Labrador are more apt than others to consider taste to be a critically important factor. New Brunswickers are less likely than others to rate product quality as critically important, and more likely to consider a sale to be critically important. Nutritional labelling is most likely to be a critically important factor for residents of Nova Scotia and Newfoundland and Labrador. Islanders are more apt than others to rate being grown in an environmentally responsible manner to be important, and less likely to assign this rating to price. Finally, Nova Scotians are least likely to consider visually appealing packaging to be a critically important purchase influencer.

Importance of Factors to Food Purchase Decision
(% saying critically important)

	Overall %	NB %	PE %	NS %	NL %
Taste	67	62	68	70	69
Product quality	62	59	62	63	63
Nutritional labelling	41	39	38	43	43
Grown/produced in environmentally friendly way	35	34	40	35	35
Price	33	33	28	33	35
Environmentally friendly packaging	29	29	31	29	29
A sale	22	27	21	18	22
Being locally produced	18	17	20	18	19
A familiar brand name	17	18	16	16	19
Visually appealing packaging	11	14	12	7	16

The following is an analysis of differences between the various population subgroups:

Taste: Those most likely to indicate taste is critically important include residents in the middle- and upper-income brackets, younger residents, and those with children at home. Taste is most important to Strivers.

Product quality: Middle- and upper-income earners, younger residents, those who have completed at least some post secondary education, and residents with children at home are most likely to consider this factor to be critically important. Strivers are most likely, while Pensioners are least likely to rate product quality as critically important.

Nutritional labelling: Women, middle-income earners, older residents, those who have completed a post secondary degree or diploma, and residents who do not have children living in their household are most apt to consider this factor to be critically important to their food purchase decision. Among the demographic segments, Affluents and Pensioners are most apt, while Daily Grinders are least apt to rate this factor as critically important.

Grown in an environmentally responsible fashion: Lower income earners, residents who have not completed high school, and those with no children at home are more likely than others to rate this factor as critically important. Among the demographic segments, Affluents are least likely and Daily Grinders are most likely to consider how a product is grown to be critically important.

Price: This factor is most likely to be considered important by lower income earners and those who have not completed high school. Among the demographic segments, Daily Grinders and Pensioners are most likely to consider price to be a critically important factor.

Environmentally friendly packaging: Those most likely to rate this factor as critically important include residents in the lower- and middle-income brackets, those who have not completed high school, and residents with no children at home. Daily Grinders are considerably more likely, while Sustainers are somewhat more likely than other segments to indicate this factor is critically important.

A sale: Lower income earners and those with a high school or lower level of education are more likely than others to rate this factor as critically important. Among the demographic segments, Daily Grinders are most likely to consider sales to be critically important.

Being locally produced: The likelihood of rating this factor as critically important increases with age. Residents who have not completed high school and those with no children in their household are more apt than others to consider local production to be important. Among the demographic segments, Strivers and Daily Grinders are less apt than other segments to rate this factor as critically important.

A familiar brand name: This factor is most likely to be rated as critically important by lower income earners, residents aged 55 years and older, and those with a high school or lower level of education. Among the demographic segments, Pensioners are most likely to consider a familiar brand name to be critically important.

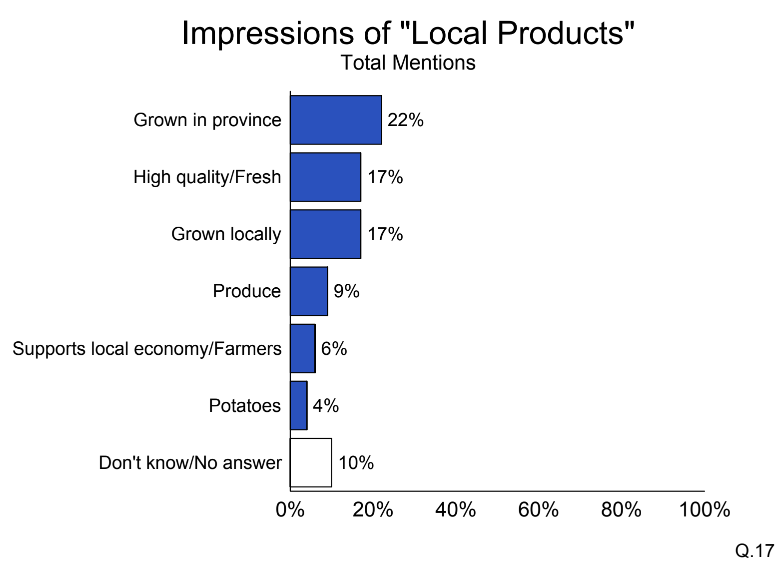
Visually appealing packaging: This factor is most important to lower income earners and those with lower levels of education. Among the demographic segments, visually appealing packaging is least important to Strivers and Affluents.

Perceptions of "Local"

Consumers may not have sufficient information at their disposal to make a clear distinction between local and non-local food products, and no single compelling descriptor emerges as a top-of-mind association with the term "local food products."

Impressions of "Local Products"

Atlantic Canadians offer a variety of responses when asked what comes to mind when they hear the expression "local products" in terms of food products available at a grocery store. Approximately two in ten associate this expression with being grown in their province, being high quality/fresh, or being grown locally. One in ten, meanwhile, mention produce in general, with no other response offered by more than 6 percent of those surveyed. Notably, one in ten do not offer an opinion on the matter. (Table 17)



As illustrated by the following table, there is considerable variance in opinion among the provinces. Notably, New Brunswick residents are less likely than other Atlantic Canadians to associate local products with being grown in the province. Nova Scotians are most likely, while residents of Newfoundland and Labrador are least likely to link local products with being grown locally or by local farmers. Newfoundland and Labrador residents are more likely than others to mention produce, and less likely to mention Atlantic Canada/Maritimes, while Islanders are more apt to talk about the contribution to the local economy and potatoes.

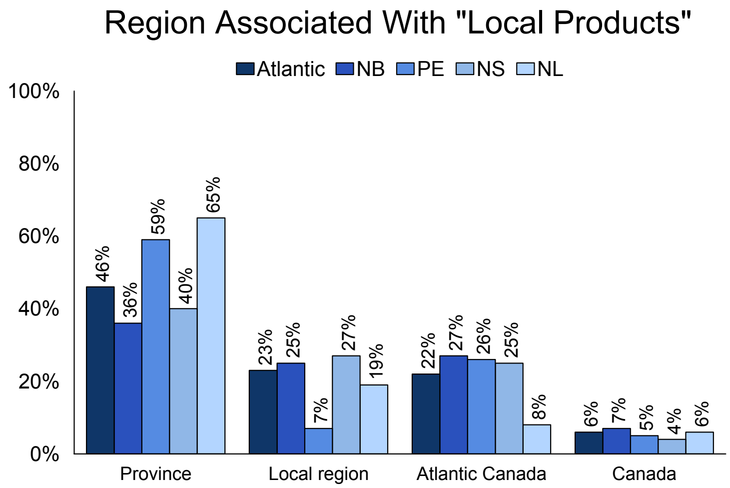
Top-of-Mind Association of "Local Products"

	Overall %	NB %	PE %	NS %	NL %
Grown in the province	22	15	29	23	27
High quality/Fresh food	17	15	17	19	18
Grown locally/local farmers	17	17	16	21	8
Produce (general)	9	9	7	6	16
Supports local community/farmers/economy	6	5	12	7	6
Potatoes	4	5	15	3	4
Grown in Atlantic Canada/Maritimes	4	6	7	5	0
Interested in/like to purchase them	4	3	4	4	4
Don't know/No answer	10	12	7	7	12

Across the population, higher income earners are more likely than those in the lower-income bracket to describe local products as being grown in their province. Older residents are more apt than their younger counterparts to state local products are high quality. Comparing the demographic segments, Daily Grinders and Pensioners are less likely than other segments to describe local products as those grown in their province. Daily Grinders are more likely to consider local products to be those grown locally, while Affluents are more apt to describe them as high quality.

Provenance of Local Products

When asked about the specific origin of "local products," close to one-half of primary grocery shoppers associate local products with being grown in their province, and this opinion is more prevalent among residents of Prince Edward Island and Newfoundland and Labrador. One-quarter of primary grocery shoppers assign a more narrow geographic area, and associate local foods with the county or areas nearby where they live, while just over two in ten assign the more broad geographic region of Atlantic Canada. Few associate local products with being from Canada. Regionally, residents of New Brunswick and Nova Scotia are most likely, while Islanders are least likely to associate local products with being from the county or areas nearby. Residents of Newfoundland and Labrador are considerably less likely than Maritimers to associate local products with being from Atlantic Canada. (Table 18)

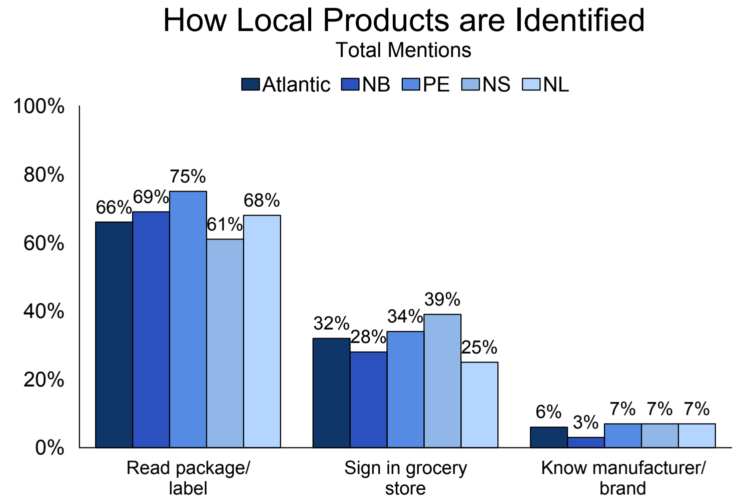


Q.18

Across the population, those most likely to associate local products with being from Atlantic Canada include men, higher income earners, those under 35 years of age, and residents with a high school or higher level of education. Older residents are more apt than those under 35 years of age to consider local products to be those from the county or areas immediately nearby where they live, while those who have not completed high school are more apt than those with higher levels of education to link local products with being from Canada. Comparing the demographic segments, Daily Grinders are less likely than other segments to state local food products are those from their province or from Atlantic Canada, and more likely to associate these products with being from Canada. Sustainers are most apt to consider local food products to be those from their province.

Identification of Local Food Products

Two-thirds of those surveyed use packaging or product labels as a source of information to determine whether a product is local, while one-third rely on signs posted in the grocery store. No other means of determining whether a product is local is named by more than 6 percent of those surveyed. Regionally, Islanders are most likely, while Nova Scotians are least likely to rely on product packaging or labels to ascertain where a product is from. Residents of Prince Edward Island and Nova Scotia are more apt than others to use signs posted in grocery stores. (Table 19)



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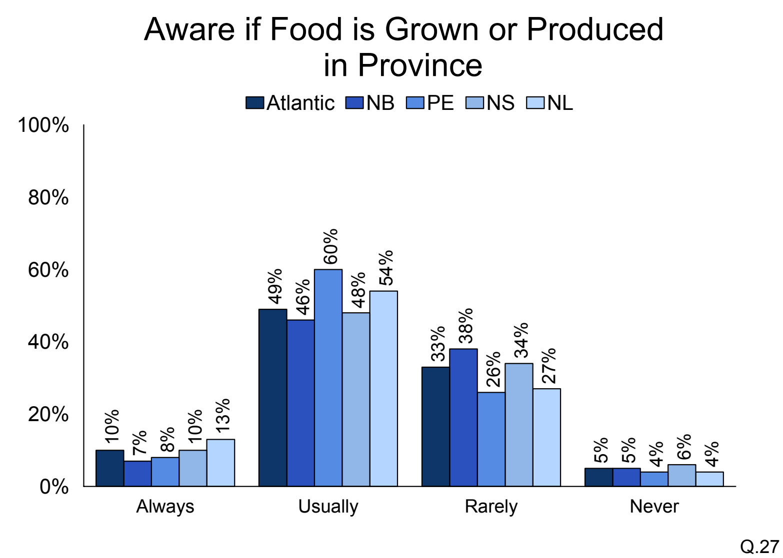
Across the population, the incidence of using product packaging or labels increases with income. Those most likely to utilise grocery store signs include women, higher income earners, and those with children in their household. Residents who have not completed high school are less likely than those with higher levels of education to identify grocery store signs as an information source. Pensioners are less apt than other segments to rely on packaging or product labels, while Daily Grinders are less likely to use signs in grocery stores as an information source.

Local Product Purchase Behaviour

A large number of consumers have difficulty identifying locally produced food products.

Knowledge of Local Products

Atlantic Canadians do not have a high degree of comfort in their ability to identify local food products when shopping at a grocery store. Only one in ten state they always know if what they are purchasing is locally produced, while one-half state they usually know. Nearly four in ten are unable to differentiate local products from those grown or produced elsewhere. Residents of Prince Edward Island and Newfoundland and Labrador are most likely to feel comfortable differentiating local products from those produced elsewhere. (Table 27)



Across the population, those most apt to state they always or usually know whether a food product is local include higher income earners, older residents, and those who have completed a post-secondary degree or diploma. Sustainers and Affluents are more likely than other segments to feel comfortable identifying local food products.

Category Purchases

Atlantic Canadians are most likely to state they look for locally produced products when shopping for fresh vegetables. At least one-half look for local products when shopping for fresh fish, fresh fruit, dairy products other than milk, and chicken. Residents are less likely to look for local products when they purchase beef, packaged frozen fish, frozen vegetables, juice, and packaged cookies and crackers, and are least likely to look for local products when buying canned goods or frozen prepared foods. (Tables 22a-22l)

Local Product Purchase Behaviour (% saying they look for local products when purchasing category)					
	Overall %	NB %	PE %	NS %	NL %
Fresh vegetables	80	78	85	78	85
Fresh fish	69	62	64	71	78
Fresh fruit	64	65	63	72	48
Dairy products other than milk	59	55	69	57	64
Chicken	53	46	55	51	67
Beef	43	43	62	45	37
Packaged frozen fish	41	35	37	40	54
Frozen vegetables	32	35	39	34	21
Juice	28	28	18	30	26
Packaged cookies/crackers	24	19	16	16	48
Canned goods	20	19	17	24	16
Frozen prepared foods (e.g., lasagna)	20	25	22	19	14

Notably, primary grocery shoppers are most likely to state they typically do not purchase the following categories at all: frozen prepared foods (21%), packaged frozen fish (18%), fresh fish (10%), frozen vegetables (9%), and packaged cookies or crackers (7%).

Several differences are observed regionally and across the population as follows.

Fresh vegetables: Residents of Prince Edward Island and Newfoundland and Labrador are more likely than those who live in Nova Scotia and New Brunswick to look for locally grown fresh vegetables. Those most likely to look for local fresh vegetables include higher income earners and older residents. Affluents are most apt to state they typically look for local fresh vegetables when shopping.

Fresh fish: Residents of Nova Scotia and Newfoundland and Labrador are more apt than other Atlantic Canadians to state they typically look for locally produced fresh fish. Across the population, men, higher income earners, older residents, and those with no children at home are more likely than others to look for local fresh fish. Among the demographic segments, Affluents are most likely, while Strivers and Daily Grinders are least likely to look for locally produced fresh fish.

Fresh fruit: Residents of Nova Scotia are most likely, while those who live in Newfoundland and Labrador are least likely to look for locally produced fruit. Across the population, women, older residents, and higher income earners are most apt to look for local fresh fruit. Affluents are more apt than other segments to state they typically look for locally produced fresh fruit.

Dairy products other than milk: Residents of Prince Edward Island and Newfoundland and Labrador are more likely than those who live in Nova Scotia and New Brunswick to look for locally produced dairy products. The incidence of looking for local products increases with age, and is higher among residents with no children at home. Affluents, Pensioners, and Sustainers are more likely than Strivers and Daily Grinders to state they typically look for locally produced dairy products.

Chicken: Regionally, residents of Newfoundland and Labrador are most likely, while New Brunswickers are least likely to look for locally produced chicken. The incidence of looking for locally produced chicken is higher among those with lower levels of income and/or education, older residents, and residents with no children living in their household. Among the demographic segments, Affluents, Sustainers, and Pensioners are more apt than Strivers and Daily Grinders to state they typically look for locally produced chicken.

Beef: Islanders are considerably more likely than other Atlantic Canadians to look for local beef, while residents of Newfoundland and Labrador are least likely to do this. Across the population, those most likely to look for local beef include lower income earners, older residents, and those who have not completed high school. Pensioners and Sustainers are most apt to state they typically look for local beef.

Packaged frozen fish: Residents of Newfoundland and Labrador are considerably more likely than other Atlantic Canadians to look for locally produced frozen fish. Across the population, those most apt to look for local frozen fish include men, older residents, those who have not completed high school, and residents with no children at home. Strivers and Daily Grinders are least likely to typically look for local frozen fish.

Frozen vegetables: Residents of Prince Edward Island are most likely, and residents of Newfoundland and Labrador are least likely to usually look for locally produced frozen vegetables. Across the population, those most likely to look for local frozen vegetables include residents with lower levels of income and/or education, older residents, and those with no children living at home. Affluents and Pensioners are more likely than other segments to look for local frozen vegetables.

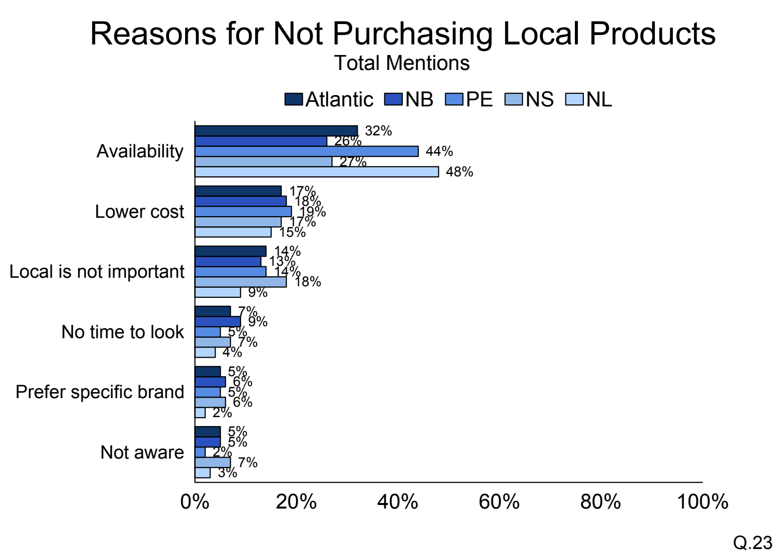
Juice: Regionally, Islanders are least apt to look for locally produced juice. Across the population, those most apt to look for locally produced juice include men, lower income earners, older residents, those who have not completed high school, and residents with no children at home. Pensioners, Affluents, and Sustainers are more likely than Strivers and Daily Grinders to look for local juice.

Packaged cookies/crackers: The presence of the Purity brand of cookies and crackers in Newfoundland and Labrador is evident, with residents of this province being much more likely than other Atlantic Canadians to state they look for locally produced cookies and crackers. Across the population, those most apt to look for locally produced cookies and crackers include older residents and those with lower levels of income and/or education. Strivers and Daily Grinders are less apt than other segments to look for local cookies and crackers.

Canned goods: Nova Scotians are slightly more likely than other Atlantic Canadians to state they typically look for locally produced canned vegetables. The incidence of looking for local canned vegetables is highest among residents with lower levels of income and/or education, older residents, and those with no children in their household. Pensioners are most apt, while Strivers are least likely to typically look for locally produced canned goods.

Frozen prepared foods: Residents of Newfoundland and Labrador are least likely to typically look for locally produced frozen prepared goods. Across the population, residents with a high school or lower level of education are more apt than those with higher levels of education to state they look for local frozen prepared goods. Among the demographic segments, Strivers are least likely to look for local frozen prepared foods.

Primary grocery shoppers who indicated they typically do not look for locally produced products for any of the food categories under consideration were asked why they do not look for local products. The most common response is lack of availability, offered by one-third of those surveyed, followed by lower cost for goods imported from elsewhere. Just over one in ten state purchasing local foods is not an important consideration. Regionally, the issue of availability is most prevalent in Prince Edward Island and Newfoundland and Labrador. (Table 23)



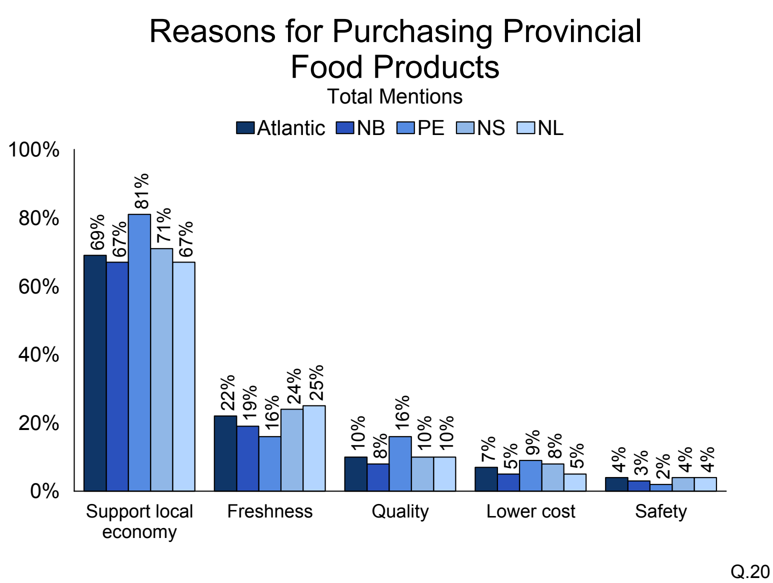
Across the population, those most likely to cite availability as a reason for not purchasing locally produced products include men, higher income earners, older residents, and those with no children at home. The perception that non-local products cost less is more apparent among lower income earners, younger residents, and those who have not completed high school. Residents under 35 years of age are more likely than older residents to state purchasing local foods is not an important consideration. Comparing the demographic segments, Affluents are most likely, and Daily Grinders are least likely to identify availability, while Daily Grinders are most apt to cite cost as a reason for not purchasing locally produced food items.

Evaluation of Local Products

Shoppers are well aware of the contribution of local products to their provincial economy, a finding that could be useful in communications strategies promoting local food products.

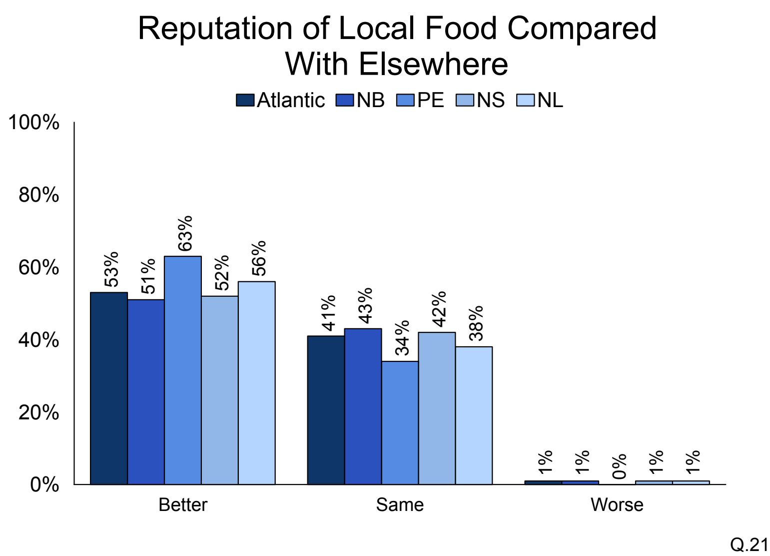
Benefits of Local Food Products

Atlantic Canadians are cognizant of the link between local foods and the local economy, and seven in ten name (unaided) supporting the local economy as a key benefit of purchasing local food products. Just over two in ten cite freshness, with one in ten naming the related benefit of quality. Close to one in ten cite lower costs as a benefit, with no other benefit named by more than four percent of those surveyed. Residents of Prince Edward Island are most likely to name the contribution to the local economy as a benefit of purchasing local food products, and are also more likely than others to identify quality, while residents of Nova Scotia and Newfoundland and Labrador are more likely than others to cite freshness. (Table 20)



Across the population, those most likely to cite supporting the local economy as a benefit of purchasing locally produced products include higher income earners and residents who have completed at least some post-secondary education. The likelihood of mentioning freshness or quality increases with income, age, and/or education. Comparing the demographic segments, Daily Grinders are considerably less likely than other segments to recognize the contribution of local food products to the local economy. Affluents are more apt than other segments to identify quality and freshness as key benefits of purchasing local food products.

More than one-half of Atlantic Canadians consider the overall reputation of food grown or produced in their province to be better than food imported from elsewhere, and this opinion is more prevalent in Prince Edward Island compared with the remaining three Atlantic Provinces. Four in ten rate the overall reputation as the same as food imported from elsewhere, and very few consider local food to be worse than food produced elsewhere. (Table 21)



Across the population, those most likely to assess the overall reputation of food produced in their province as better than food imported from elsewhere include women, residents in the upper-income bracket, older residents, and those who have not completed high school. Among the demographic segments, Affluents and Pensioners are most apt to consider the overall reputation of local food products to be better than foods imported from elsewhere.

Rating of Local Products

Taste, and to a lesser extent, being grown in an environmentally responsible manner as well as nutritional value emerge as comparative strengths of locally produced items, vis-à-vis food items imported from outside the region.

Taste appears to be the key factor that differentiates locally produced products from those grown or produced elsewhere. Close to one-half of those surveyed rate locally produced food products as tasting better than those grown or produced elsewhere. Three in ten rate local products better in terms of being grown in an environmentally responsible manner, with a similar number offering a positive assessment with respect to local food products' nutritional content. Two in ten each rate local products as better than those produced elsewhere with respect to price and environmentally friendly packaging. Primary grocery shoppers are least likely to assess local products as better in the area of visually appealing packaging. (Tables 30a-30f)

Local Product Evaluation (% saying local products are better)					
					NL %
Taste	44	41	52	40	56
Environmentally responsible	30	29	31	28	37
Nutritional content	27	27	27	25	28
Price	22	22	24	22	22
Environmentally friendly packaging	19	18	18	19	19
Visually appealing packaging	12	13	13	9	15

Differences in opinion are noted both regionally and across the population as follows:

Taste: Residents of Prince Edward Island and Newfoundland and Labrador are more convinced than those who live in Nova Scotia and New Brunswick that locally produced products taste better than products grown or produced elsewhere. This opinion is also more prevalent among those in the upper-income bracket and older residents. Comparing the demographic segments, Affluents and Sustainers are most likely to believe local products taste better.

Environmentally responsible growing practices: Residents of Newfoundland and Labrador are more likely than residents of other provinces to consider local products to better in terms of causing the least amount of harm to the environment. This opinion is also more prevalent among residents who have not completed high school. Results are generally consistent across the demographic segments.

Nutritional content: Results are generally consistent across the region. Men, older residents, and those with no children at home are more apt than others to rate local foods as better in terms of nutritional content. Pensioners are more apt than other segments to offer this opinion.

Price: Results are generally consistent across the region. Across the population, those most apt to rate local foods as better than those produced elsewhere include residents in the lower-income bracket, those who have not completed high school, and residents with children living at home. Daily Grinders are most likely and Strivers are least likely to assess local foods as better in terms of price.

Environmentally friendly packaging: Results are generally consistent across the region. Those most likely to assess local foods as better include lower income earners, older residents, and those who have not completed high school. Among the demographic segments, Pensioners and Daily Grinders are more likely than other segments to think local products are better than those produced elsewhere.

Visually appealing packaging: Results are generally consistent across the region. Looking at other demographic subgroups, residents in the lower-income bracket, older residents, and those with lower levels of education are most apt to rate local food products as superior to those produced elsewhere with respect to packaging. Pensioners are most likely while Affluents are least likely to feel local products are positively differentiated by their packaging.

Few residents rate local products as worse than those produced elsewhere on any of the evaluation criteria, as evidenced by the following table. Price and visually appealing packaging are most likely to receive negative evaluations. (Tables 30a-30f)

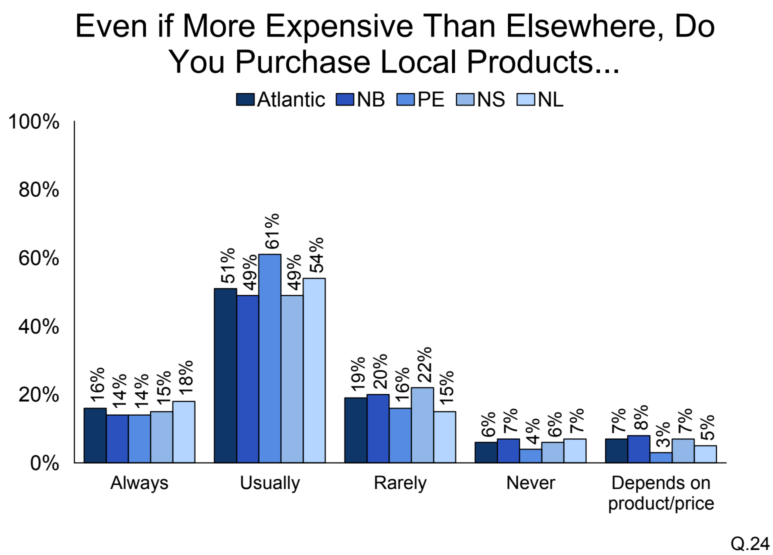
Local Product Evaluation
(% saying local products are worse)

	Overall %	NB %	PE %	NS %	NL %
Price	10	6	8	10	15
Visually appealing packaging	5	4	9	5	8
Environmentally friendly packaging	2	2	3	2	4
Taste	1	1	1	0	0
Environmentally responsible	1	2	3	0	1
Nutritional content	1	0	1	1	2

Influences on Local Product Purchase Behaviour

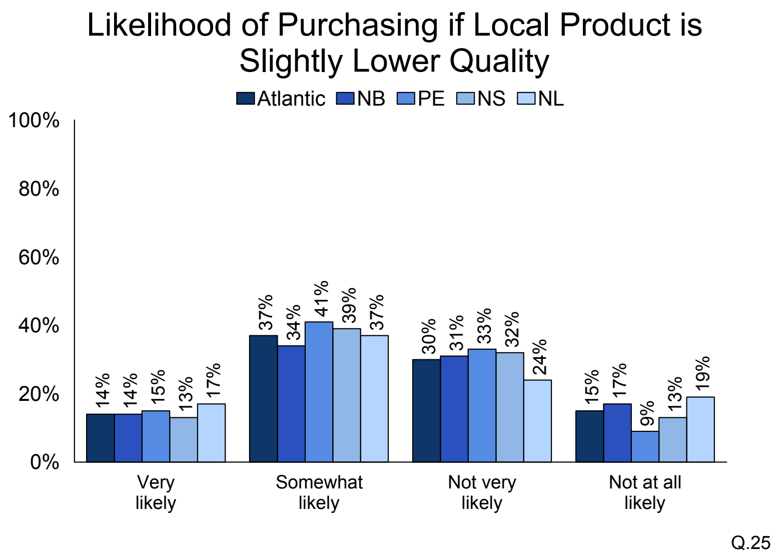
Grocery shoppers express a willingness to consider local food products over their regular brands, and local farmers are identified as the most credible group to endorse or promote local food products.

If given the choice between two comparable food items, close to seven in ten Atlantic Canadians state they always or usually purchase the local product, even if it is more expensive. One-quarter rarely or never purchase the local product, while close to one in ten state their purchase decision depends on the product in question or the price. Regionally, residents of Prince Edward Island and Newfoundland and Labrador appear more willing than those who live in New Brunswick and Nova Scotia to support local products. (Table 24)



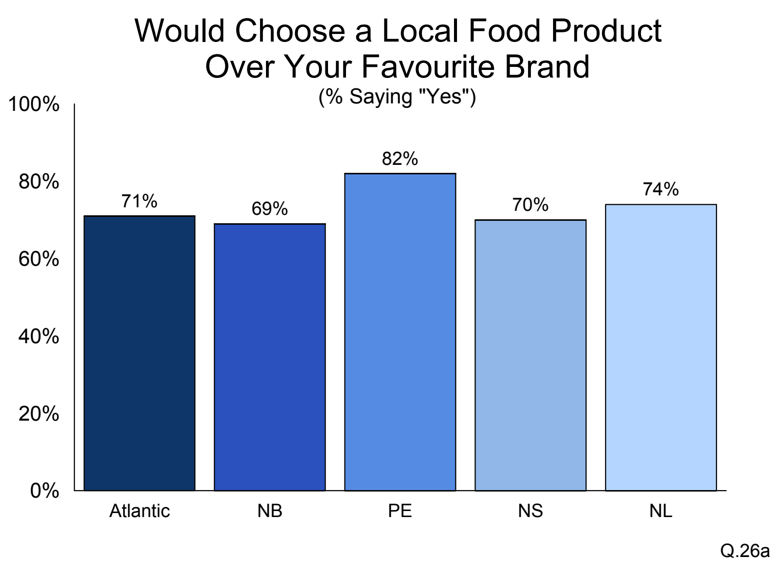
Across the population, willingness to purchase a more expensive local product over a comparable one grown or produced elsewhere is highest among higher income earners, older residents, and those who have completed a post secondary degree or diploma. Affluents are most likely, while Daily Grinders are least likely to state they always or usually choose local products under this scenario.

Residents are less willing to purchase a local product if it is of lower quality than a comparable product grown or produced elsewhere. Under this scenario, one-half of those surveyed are very or somewhat likely to purchase the local product, while close to one-half are unwilling to choose the local product. Residents of New Brunswick are less willing than other Atlantic Canadians to consider purchasing a lower quality local product. (Table 25)



Across the population, those most willing to choose a local product even if it is of a lower quality than a comparable product from elsewhere include residents with lower levels of income and/or education. Daily Grinders are most likely, while Affluents and Strivers are least likely to state they will purchase a lower quality local product.

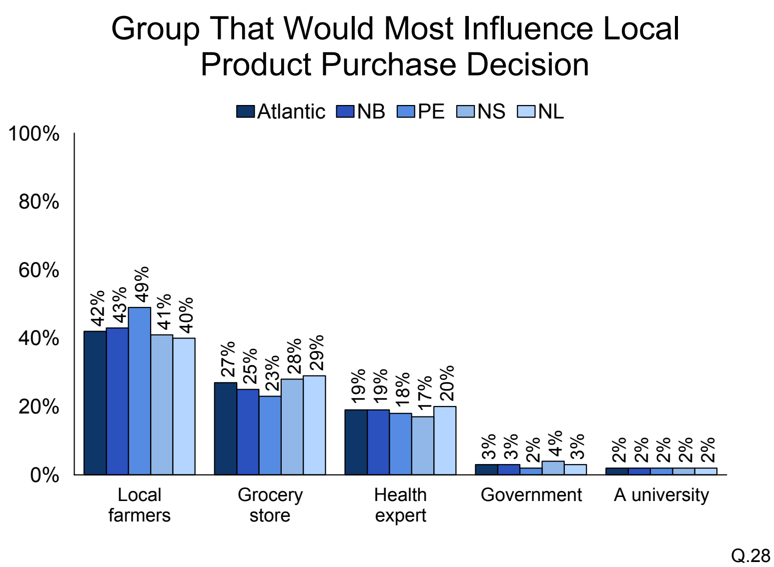
Seven in ten Atlantic Canadians state they would choose a locally produced product over their favourite brand, with this opinion being most prevalent in Prince Edward Island. (Table 26)



Across the population, older residents are more likely than those under 35 years of age to consider choosing a local product over their favourite brand. Affluents, Sustainers, and Pensioners are more apt than Strivers and Daily Grinders to feel this way.

Those who expressed a willingness to choose a locally produced product over their favourite brand were asked if they would still choose the local product if it was more expensive than their favourite brand. Just over seven in ten would still purchase the local product. (Table 26b)

Local farmers are chosen most frequently as a credible group to promote or endorse local food products. Just over four in ten primary grocery shoppers indicate promotion or endorsement of local products by local farmers would influence them to purchase local food products. Close to three in ten view grocery stores as credible endorsers, while two in ten would pay attention to a health expert or doctor. Few consider government or universities to be strong influencers. Regionally, residents of Prince Edward Island are more likely than others to choose local farmers. Nova Scotians and residents of Newfoundland and Labrador are more likely than those who live in New Brunswick and Prince Edward Island to consider grocery stores to be credible endorsers of local food products. (Table 28)



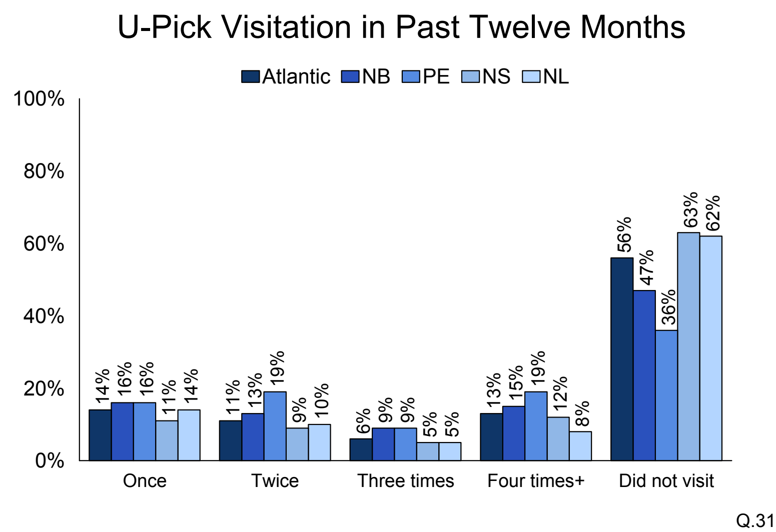
Results are generally consistent across the population, although men are more apt than women to choose grocery stores, and those with a high school or higher level of education are more likely than those who have not completed high school to choose local farmers. Comparing the demographic segments, Strivers are more likely than other segments to choose grocery stores, while Daily Grinders are more apt to choose a health expert or doctor and less apt to name local farmers as credible local food product endorsers.

Specialized Food Retail Operations

Farmers' markets are more frequently visited than U-pick farms or roadside food stands. Product freshness is the most compelling feature of these retail operations.

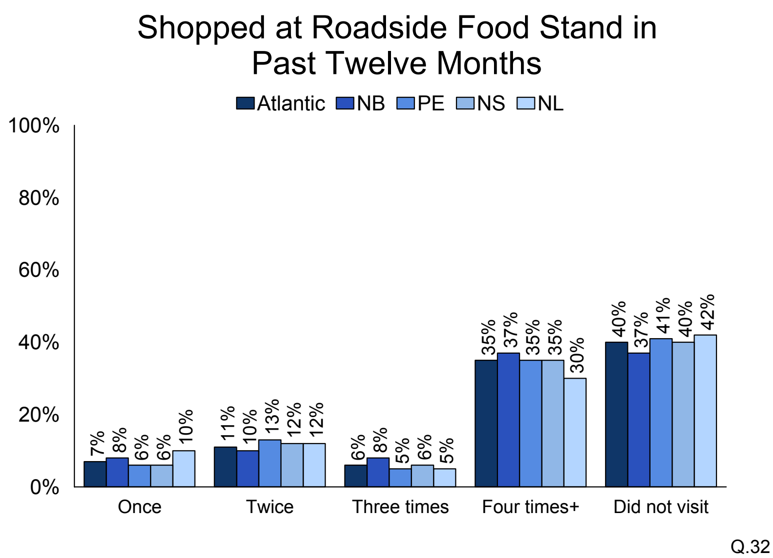
Farmers' Markets/Farm Stands

The average primary grocery shopper made 1.6 trips to a U-pick fruit or vegetable farm in the past year, and residents of New Brunswick and Prince Edward Island are most likely to have visited a U-pick farm. (Table 31)



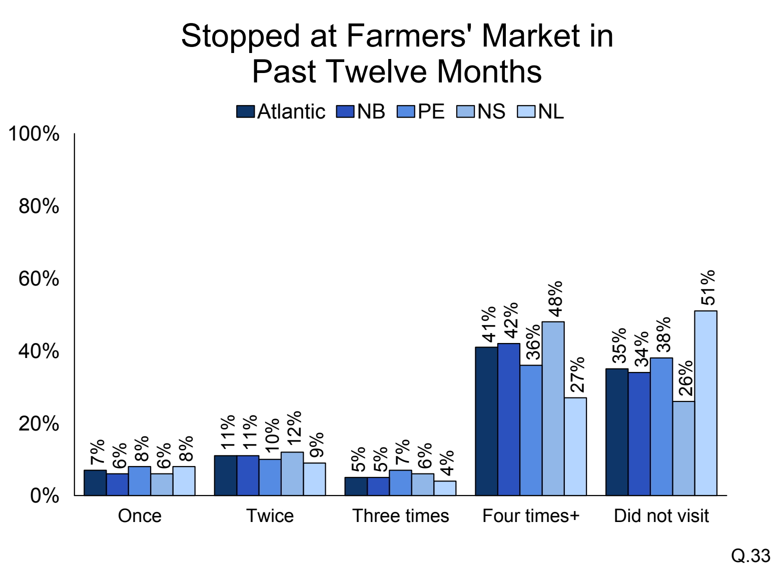
The most frequent visitors to U-pick farms include women, residents in the middle- and upper-income brackets, those aged 35 to 54 years, and residents with children in their household. Among the demographic segments, Sustainers are the most frequent visitors.

Atlantic Canadians are more likely to have visited roadside food stands, with the average resident making 4.7 trips to a food stand in the past year. Primary grocery shoppers who live in New Brunswick and Nova Scotia are more frequent visitors than those who live in Prince Edward Island and Newfoundland and Labrador. (Table 32)



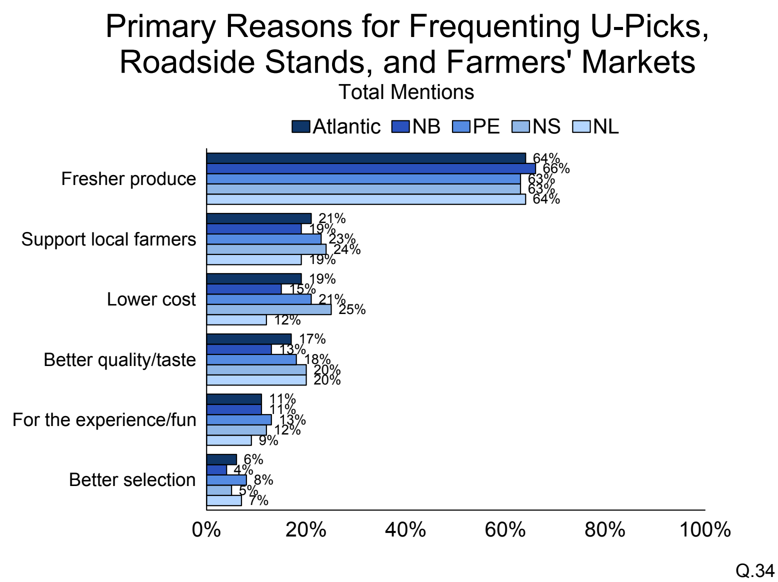
The most frequent visitors to roadside food stands include higher income earners, older residents, residents with higher levels of education, and those with children at home. Affluents and Sustainers made more trips to roadside food stands in the past year compared with other demographic segments.

Primary grocery shoppers are most likely to have visited a farmers' market in the past year, making an average of 7.0 trips. Nova Scotians are the most frequent visitors, followed by residents of New Brunswick, with residents of Newfoundland and Labrador making the fewest number of trips. (Table 33)



Across the population, higher income earners, older residents, those who have completed high school or a higher level of education, and residents with children at home made the highest number of trips to a farmers' market in the past year. Affluents made the most trips, while Daily Grinders made the least number of trips to a farmers' market.

Fresher produce is the dominant reason why primary grocery shoppers frequent U-pick operations, roadside food stands, and farmers' markets, followed distantly by the desire to support local farmers, lower cost, better quality, and for the experience. No other reason is offered by more than 6 percent of those surveyed. Regionally, residents of Prince Edward Island and Nova Scotia are somewhat more likely than other Atlantic Canadians to offer the reasons of support for local farmers and lower cost. (Table 34)

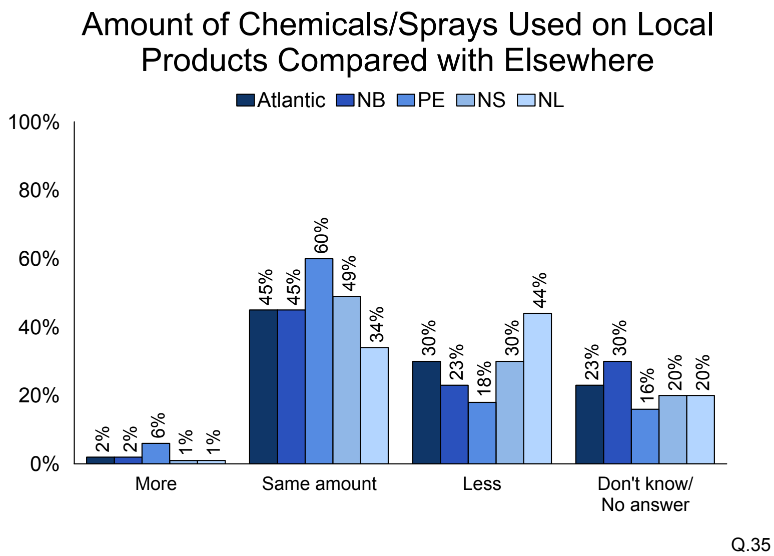


Across the population, the incidence of citing fresher produce is higher among women, higher income earners, and older residents. Those most likely to identify lower cost include lower income earners and residents aged 55 years and older. Examining the demographic segments, Affluents, Pensioners and Sustainers are more likely than Strivers and Daily Grinders to offer fresher produce as a reason. Strivers, Sustainers, and Affluents are most likely while Pensioners are least likely to express a desire to support local farmers. Lower cost is mentioned most frequently by Daily Grinders and Pensioners, while better quality is a more common response among Sustainers and Affluents. Strivers are more likely than other segments to talk about the overall experience of visiting one of these venues.

Food Safety

Locally produced foods receive a moderately positive assessment in terms of use of chemicals and pesticides. Not using bio-solids is an attractive selling feature.

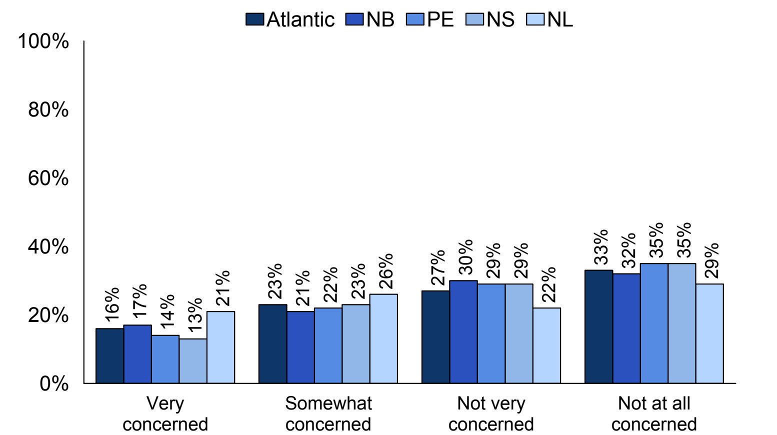
Fruits and vegetables grown locally receive a favourable assessment in terms of perceptions about the amount of chemicals and pesticides used. Specifically, three in ten primary grocery shoppers believe local crops are grown using fewer treatments, while more than four in ten do not perceive a difference. Only two percent think local crops use more chemicals and pesticide sprays, and this opinion is limited primarily to residents of Prince Edward Island. Looking at those who believe fewer chemicals and pesticide sprays are used, this opinion is most prevalent among residents of Newfoundland and Labrador, and least prevalent in Prince Edward Island. (Table 35)



Across the population, those most likely to believe local crops are grown using fewer treatments than elsewhere include women, lower income earners, and residents with lower levels of education. Daily Grinders are more likely than other segments to offer this assessment.

BSE, also known as mad cow disease, causes moderate levels of concern among Atlantic Canadians. Four in ten state they are very or somewhat concerned about the safety of beef sold in their province, while six in ten are not concerned. Regionally, residents of Newfoundland and Labrador are most likely to be worried about the safety of their beef supply. (Table 36)

Concern About Beef Sold in Province

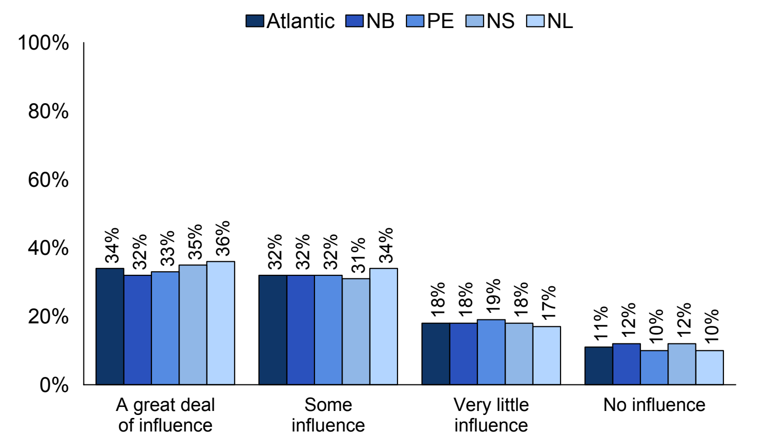


Q.36

Across the population, concern about food safety is most prevalent among women, lower income earners, and residents with high school or a lower level of education. Daily Grinders are most likely while Strivers and Affluents are least likely to express concern about the safety of provincial beef.

When asked about the guarantee of an absence of bio-solids being used as fertilizer, two-thirds of those surveyed indicate this would have at least some influence on their decision to purchase local food products. Three in ten state this guarantee would have little or no influence on their purchase habits. Opinion is generally consistent across the region. (Table 37)

Influence of Not Using Biosolids in Decision to Purchase Local Food Products



Q.37

Those most likely to be positively influenced by the knowledge that bio-solids are not used as fertilizer include women and residents with children at home. Sustainers are most likely while Strivers are least likely to indicate this factor would influence their purchase behaviour.

Study Methodology

Questionnaire Design

The study questionnaire used for the **2005 Atlantic Canada Food Consumer Study** was developed by CRA in consultation with CAP representatives. Prior to being finalized, the survey was pre-tested on a small number of applicable respondents to ensure the appropriateness of the questions and response categories.

Sample Design and Selection

The sample for this study was designed to complete interviews with a representative sample of 1600 adult Atlantic Canada residents who are primary grocery shoppers for their household. The sample records for the study were provided by CRA.

Survey Administration

The survey was conducted by telephone from February 14 to March 26, 2005 from Corporate Research Associates' data collection facilities. Fully-trained and supervised interviewers conducted all interviews, and a minimum of 10 percent of all completed interviews was subsequently verified. The average length of time required to complete an interview was 17 minutes. A total of 1602 interviews were completed with Atlantic Canada primary grocery shoppers, 400 in each of New Brunswick and Nova Scotia, and 401 in each of Prince Edward Island and Newfoundland and Labrador.. A sample of 1602 drawn from the adult population of Atlantic Canada would be expected to provide results accurate to within +/- 2.4 percentage points in 19 out of 20 samples. A sample of 400 or 401 drawn from the adult population of each of the four Atlantic Provinces would be expected to provide results accurate to within +/-4.9 percentage points in 19 out of 20 samples.

Sampling Tolerances for Percentage Results by Sample Size

Size of Sample	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
1,600 Interviews	1.5	1.9	2.2	2.4	2.4
1,500 Interviews	1.5	2.0	2.3	2.5	2.5
1,000 Interviews	2.0	2.4	2.8	3.0	3.1
500 Interviews	2.6	3.5	4.0	4.3	4.4
400 Interviews	3.0	3.9	4.5	4.8	4.9
300 Interviews	3.4	4.5	5.2	5.5	5.7
250 Interviews	3.7	5.0	5.7	6.1	6.2
200 Interviews	4.0	5.4	6.2	6.8	7.0
100 Interviews	5.7	7.5	8.8	9.5	9.9
50 Interviews	8.0	11.0	13.0	13.7	14.2

Completion Results

Completion rate is calculated as the number of completed interviews, divided by the total number of telephone numbers called minus ineligible numbers, those respondents who could not be reached during the interview period and disqualifications. The following table illustrates completion results for the **2005 Atlantic Canada Food Consumer Study**. Completion rate is calculated as the number of cooperative contacts divided by the total number of eligible numbers attempted. The completion rate for this study is 20 percent.

Completion Results

TOTAL NUMBERS ATTEMPTED	**17,816**
Not in service/Blocked	2,900
Fax/Modem/Cell/Pager	355
Incorrect/Business number	295
TOTAL ELIGIBLE NUMBERS	**14,266**
Busy	124
Answering machine	1,419
No answer	1,684
Selected/Eligible respondent not available/Callbacks	2,373
Illness/Incapable	362
Language problem	116
TOTAL ASKED	**8,188**
Gatekeeper/Respondent refusal	5,415
Qualified respondent break off	68
COOPERATIVE CONTACTS	**2,705**
Disqualified/Quota Full	1,103
Completed interviews	**1,602**