PRA Inc.
Research & Consulting
www.pra.ca
admin@pra.ca

BUY MANITOBA FOOD:
A SURVEY OF MANITOBAN GROCERY SHOPPERS

November 18, 2008

Prepared for:

Communications Services Manitoba

TABLE OF CONTENTS

1.0 Introduction

Communications Services Manitoba engaged PRA Inc. to survey Manitobans who are responsible for the grocery shopping in their household in order to understand their shopping habits and perceptions about buying Manitoba food.

1.1 Objectives

Communications Services Manitoba is helping to create a "Buy Manitoba" initiative. The objective is to increase purchasing, awareness and consumption of Manitoba food.

This research aids this initiative by determining Manitobans':

- current food buying habits, including their purchasing of Manitoba food
- perceptions about buying Manitoba food
- definition of Manitoba food
- preference for designating food as Manitoban
- motivators for buying Manitoba food from retail grocers

The information collected in this survey will help the industry decide on the strategy for increasing the profile and consumption of Manitoba food in the province.

1.2 Methodology

PRA Inc., in consultation with Communication Services Manitoba, designed a draft questionnaire. PRA pretested the questionnaire with 12 Manitobans to check participants' understanding of the survey and the flow and timing of questions. The pretest resulted in some wording modifications. The final version of the questionnaire is in Appendix A.

Table 1 below summarizes the methodology used for this research. Respondents were selected by random digit dialling. In total, 800 adult Manitobans were surveyed as part of this study.

Table 1: Summary of methodology	
Pretest	September 8, 2008
Survey dates	September 10-29, 2008
Sample size	800
Interviewing method	Telephone
Sample selection	Random digit dialling
Approximate error rate (theoretical)	± 3.5%, 19 times out of 20

1.3 Profile of participants

Table 2 (next page) shows a profile of participants in this survey.

- Women tend to be the primary grocery shopper in most homes. About 3 in 4 respondents are women; conversely, about 1 in 4 are men.
- By definition, the respondent had to be the person in the household who was most responsible for grocery shopping. Therefore, it may not be surprising that respondents tend to be older. About half are between the ages of 40 and 64 years of age, reflecting the fact that they are often the shoppers for households with younger adults. About 1 respondent in 5 is 25 to 39 years of age and a similar percentage is 65 or older. Although, they represent about 12% of the adult population in the province, just 3% of respondents report being 18 to 24 years of age (again, reflecting that many of these individuals still live with their parents).
- About 8 in 10 respondents live in a household with at least one other person.
- About 1 respondent in 3 report that a child under 18 lives in their household, including 23% with children between the ages of 6 and 17 years and 15% with children younger than 6 years of age.

Table 2: Profile of participants	
	% (n=800)
Gender	
Women	77%
Men	22%
Age	
18 to 24	3%
25 to 39	20%
40 to 64	50%
65 and older	22%
Don't know/no response	5%
Average	
Location	
Winnipeg	60%
Outside of Winnipeg	40%
Income	
Under $40,000	23%
$40,000 to $60,000	13%
$60,000 to $80,000	11%
Over $80,000	20%
Don't know/no response	33%
Education	
Less than high school	15%
High school graduate	28%
College graduate	18%
Some university	8%
University graduate	28%
Don't know/no response	3%
Household members	
One	18%
Two	36%
Three or more	44%
Don't know/no response	2%
Children under 18 in household	
Yes	33%

2.0 Grocery shopping and eating behaviors

Below we examine respondents' grocery shopping habits, in terms of where they shop and the decisions they make while shopping. In addition, we explore when they are deciding what to eat for dinner.

2.1 Where Manitobans shop

Figure 1 shows the proportion of respondents who report shopping at different stores for groceries in a typical month. Almost all report they shop at least once a month in large grocery stores.

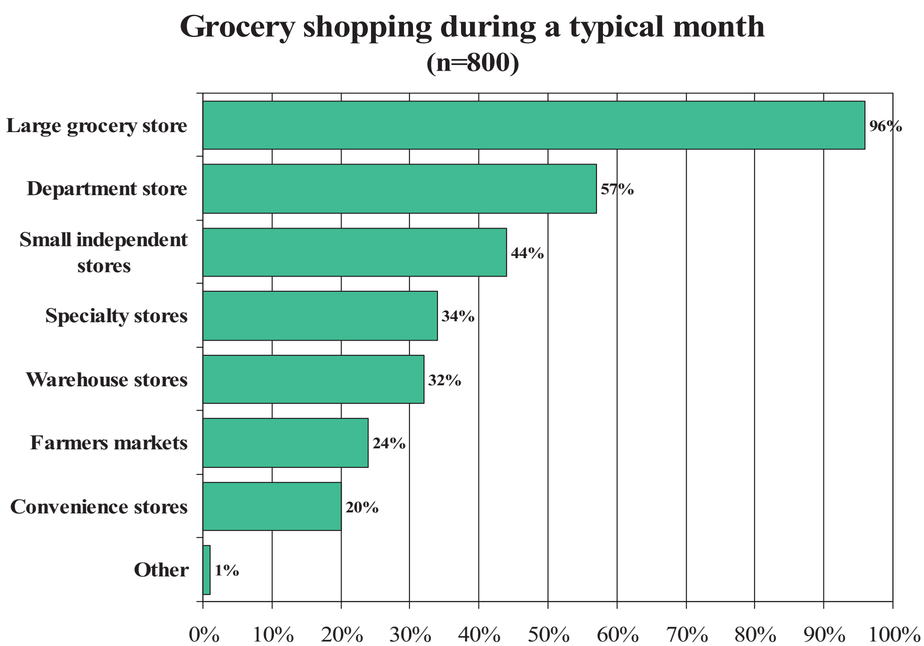

Figure 1

More details are shown in Table 3. It appears Manitobans grocery shop in a variety of places. In a typical month,

- Almost all respondents (96%) report they shop at a large grocery chain, such as Safeway, IGA, Sobeys or Superstore. Almost 7 in 10 report shopping in large department stores at least weekly, that is 4 or more times a month. The typical respondent shops at a chain store over 5 times per month.

- Almost 6 in 10 Manitobans (57%) report shopping at department stores, such as Walmart or Giant Tiger, for groceries, at least once a month. Not only are fewer Manitobans shopping for groceries at these stores, they are making fewer visits – about 3 times a month on average.

- Over 4 respondents in 10 (44%) shop at small independent stores for their groceries, including 21% who shop 4 or more times a month. Although fewer respondents shop at these stores than department stores, those who use this type of store, use it often – an average of 4 times per month.

- About 1 respondent in 3 shops at specialty stores (34%) such as bakeries or butchers. Among those who shop at such stores, the typical number of visits is over 2 per month.

- About 1 respondent in 3 also shops at least once at warehouse stores (32%), such as Costco. Among those who shop at these types of stores, the average number of visits is just under 2 times per month (lowest among all stores tested). This likely reflects that these stores tend to involve major shopping trips, where shoppers stock-up on items.

- About 1 respondent in 4 shops for groceries at farmers' markets (24%). Those who do so, visit 2 to 3 times per month. Respondents may be thinking of the summer months rather than year-round when providing their response.

- About 1 respondent in 5 shops for groceries at convenience stores, such as 7-11. Respondents who shop at convenience stores appear to do so fairly often, on average 3 times per month, which ranks third behind large grocery chains and independent stores.

- The typical respondent reports using 3 of these types of stores to shop for groceries and making about 11 shopping trips per month. A shopping trip may involve everything from picking up milk at a convenience store to doing a major shopping trip to a warehouse store.

Table 3: Number of times Manitobans shop

Q1-8 First I'd like to ask you a few questions about your household's grocery shopping. During a typical month, how many times do you shop for groceries at…

Store type	Times shop at grocery store per month % (n=800)				
	None	1	2-3	4 or more	Average (those who shop)
Large grocery chains	4%	6%	21%	69%	5.6
Department stores	43%	20%	20%	17%	3.0
Small independent stores	56%	11%	12%	21%	4.1
Specialty stores	66%	17%	10%	7%	2.4
Warehouse stores	68%	18%	9%	5%	1.9
Farmers' markets	76%	10%	7%	7%	2.5
Convenience stores	80%	8%	6%	6%	3.1
Other	99%	<1%	<1%	-	2.0
Total shopping	-	1%	4%	95%	11.4

Note: The don't know/no response column is not shown in this table, but is included in the calculations. Therefore, rows may not sum to 100%.

Table 4 presents a profile of respondents' typical shopping habits by demographic groups for those store types with at least one statistically significant difference between groups.

- The younger a respondent is, the more likely they are to shop at all types of stores, although only the difference between *warehouse stores* and *convenience stores* is statistically significant.
- Most likely due to the types of stores available in their area, respondents living in Winnipeg are more likely than those living outside of the city to shop at *larger grocery store chains*, *specialty stores*, and *warehouse stores*, while those living outside of Winnipeg are more likely to shop at *independent grocers*.
- As respondents' household income increases, so does the likelihood that they shop for groceries at *specialty stores* and *warehouse stores*.
- Respondents with children are more likely to shop at each type of store, perhaps reflecting the need for larger volumes of food and unexpected needs for particular food. This is reflected in the fact that the difference between these groups is only statistically significant for *department stores*, *warehouse stores*, and *convenience stores*.

Respondents appear to be equally as likely to shop for groceries at *farmers' markets*, and these results are not shown in this table.

Table 4: Shopping location: A profile

	Type of store % (n=800)					
	Larger chains	Department stores	Independent grocers	Specialty stores	Warehouse stores	Convenience stores
Total	96%	57%	44%	34%	32%	20%
Gender	p=.069	p=.010	p=.214	p=.001	p=.860	p=.055
Women	95%	60%	43%	31%	32%	18%
Men	99%	48%	49%	44%	31%	26%
Age	p=.379	p=.003	p=.212	p=.068	**p=.000**	**p=.000**
18 to 39	98%	62%	46%	37%	**39%**	**38%**
40 to 64	96%	60%	47%	36%	**35%**	**19%**
65 and older	94%	47%	37%	27%	**18%**	**5%**
Location	**p=.000**	p=.488	**p=.000**	**p=.000**	**p=.000**	p=.034
Winnipeg	**99%**	57%	**35%**	**42%**	**39%**	23%
Outside of Winnipeg	**92%**	58%	**57%**	**22%**	**21%**	16%
Income	p=.187	p=.220	p=.798	**p=.000**	**p=.000**	p=.684
Under $40,000	92%	56%	45%	**18%**	**11%**	19%
$40,000 to $60,000	97%	65%	43%	**33%**	**26%**	25%
$60,000 to $80,000	95%	58%	48%	**37%**	**34%**	26%
Over $80,000	98%	53%	41%	**51%**	**58%**	24%
Children in household	p=.171	**p=.000**	p=.013	p=.051	**p=.000**	**p=.000**
Yes	98%	**69%**	51%	39%	**45%**	**30%**
No	95%	**51%**	41%	32%	**25%**	**15%**

We asked respondents to think about how much they spend on groceries in a typical month, and to indentify the type of store in which they spend the most. The results in Table 5 are similar to the previous two tables, as respondents tend to spend the most on food at the store they shop at most often.

- Large grocery chains such as Safeway, Superstore and Sobeys dominate, with more than 8 respondents in 10 reporting they spend the most at these types of stores.

- About 1 in 10 reports spending the most at a small independent store. Respondents living outside of Winnipeg (16%) are more likely than those living in Winnipeg (2%) to spend the most at these stores. This most likely reflects both the convenience of an independent grocer in their community, and the lack of large chains locally.

- One in 20 respondents says they spend the most on food at warehouse stores.

- Few respondents report spending the most at department stores, specialty stores, convenience stores, or farmers' markets, suggesting that most pick up particular items from these locations.

Table 5: Where Manitobans spend the most on food in a typical month
Q9. Thinking about the amount you spend on groceries in a typical month, of the stores you mentioned, at what store would you spend the greatest amount in total on food?

Store type	% (n=800)
Large grocery chains	83%
Small independent stores	8%
Warehouse stores	5%
Department stores	3%
Specialty stores	1%
Convenience stores	<1%
Farmers' markets	<1%
Other	<1%
Don't know/no response	1%

2.2 Spur of the moment purchases

Almost 9 in 10 respondents say they purchase at least some of their food on a spur of the moment decision, with most saying that less than one-quarter of their typical food purchases are spur of the moment.

On average, respondents report that 17% of their food purchases are spur of the moment. Some respondents report that none of their food purchases are spur of the moment, and conversely, a few say all of their purchases are spur of the moment. See Table 6 for results.

Table 6: Percentage of food purchases that are spur of the moment
Q10. Thinking about your typical grocery shopping experience, what percentage of your food purchases are spur of the moment? That is, purchases that you may not have planned to buy before entering the store.

	% (n=800)
None	11%
1% to 24%	62%
25% to 49%	14%
50% to 74%	8%
75% to 100%	3%
Don't know/no response	3%
Average %	17%

Table 7 provides a profile of Manitobans and their spur of the moment shopping habits.

- Respondents age 65 and older are less likely (75%) to make spur of the moment food purchases compared to those age 18 to 39 (93%) and 40 to 64 (91%).
- Respondents with a household income under $40,000 (77%) are least likely to make spur of the moment food purchases while shopping and are well below those in households with higher incomes (91% to 96%).

Table 7: Spur of the moment food purchases: A profile	
	At least some spur of the moment food purchases % (n=800)
Total	**87%**
Gender	p=.105
Women	88%
Men	82%
Age	**p=.000**
18 to 39	**93%**
40 to 64	**91%**
65 and older	**75%**
Location	p=.714
Winnipeg	87%
Outside of Winnipeg	86%
Income	**p=.000**
Under $40,000	**77%**
$40,000 to $60,000	**92%**
$60,000 to $80,000	**91%**
Over $80,000	**96%**
Children in household	p=.020
Yes	91%
No	85%

2.3 Deciding on dinner

We asked respondents when they, or their family, typically decide what to eat for dinner.[1] As shown in Figure 2, while the majority decide on the same day as the meal itself, many other decide the day or days before.

- About 6 in 10 decide the same day what they will have for dinner, including about 1 respondent in 4 who generally decide on dinner that morning and over 1 in 5 who decide that evening.

[1] The questions was: ***Q11. And typically, when do you or your family decide on what you are going to eat for dinner? Do you decide...***

- Almost 4 in 10 report they typically decide the day before or several days before, including over 1 in 5 who decide the evening before. See Figure 2.

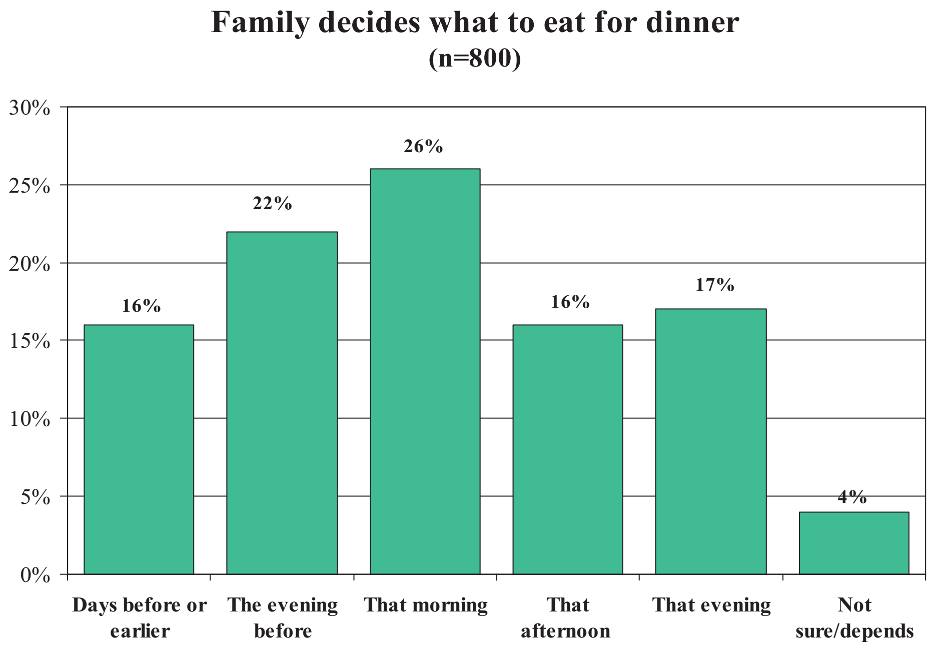

Figure 2

When they decide what to eat for dinner, does not appear to relate to the demographic characteristics of respondents.

3.0 Perceptions of Manitoba food

In this section, we discuss respondents' definitions of Manitoba food, what Manitoba food they purchase, and the reasons they purchase them.

3.1 How Manitobans define Manitoba food

Respondents define Manitoba food as:

- **A particular type of food**. Many define Manitoba food as a particular type of food, most often vegetables or produce (20%) or meats (9%).
- **Having certain qualities**. Many describe Manitoba food by their qualities, most often using positive adjectives such as "good", "excellent" or "great" (22%) or "fresh" and "healthy" (13%).
- **Grown or raised in Manitoba**. Many use describers that define Manitoba food as being something that is grown or raised in Manitoba or close to home (26%) or as "local" food (12%).
- **Other definitions.** Several respondents provide other definitions. For some, a local brand such as Peak of the Market, defines Manitoba food. About 1 respondent in 10 provides this definition.

See Table 8 (next page) for a complete list of how respondents defined Manitoba food. Many respondents provide more than one definition.

Table 8: Definitions of Manitoba food *Q12. To start, how would you define Manitoba food?*	
	Responses **%** **(n=800)**
Type of food	
Vegetable/produce	20%
Meats	9%
Milk/milk products	3%
Bread	2%
Fruit	2%
Eggs	1%
Food quality	
Good/excellent/great/ok/fine	22%
Fresh/healthy	13%
Not good/poor quality	1%
Better than food from elsewhere	1%
Nothing/not different from other food	<1%
Produced in Manitoba	
Grown in Manitoba/close to home	26%
Local	12%
Produced or manufactured in Manitoba	6%
Other descriptors	
Peak of the Market	9%
Buying locally	3%
Difficult to get/find	2%
Local businesses	2%
Easy to get/accessible	1%
Difficult to identify	1%
Less expensive	1%
More expensive	1%
Other	3%
Don’t know/no response	9%
Note: Respondents could choose more than one response. Column will sum to more than 100%.	

3.2 Manitoba food buying habits

After asking respondents to define Manitoba food, we provided them the following definition to ensure they were thinking about the same thing when answering subsequent questions about Manitoba food:

“By Manitoba food we mean food that is not only grown in Manitoba, but also processed or manufactured in the province. For the rest of the survey, please think about Manitoba food as food that is grown, processed, or manufactured in Manitoba.”

Given this definition, we asked respondents how often they think they buy Manitoba food.

- Nine respondents in 10 say they buy Manitoba food at least once a month, including almost 6 in 10 who say they buy Manitoba food once a week or more.
- While just 1% of Manitobans say they never buy Manitoba food, some (7%) simply don't know if any of the food they buy is Manitoban.

There are no differences among demographic groups (gender, age, location, income, or children in household) and how often respondents buy Manitoba food.

Table 9: Definitions of Manitoba food
Q13. How often would you say you buy Manitoba food?

	% (n=800)
Once a week or more	56%
Once every couple of weeks	24%
Once a month	10%
Less than once a month	3%
Never	1%
Don't know/no response	7%

Those who report buying Manitoba food were asked what types of food they buy. Respondents mention a variety of food:

- Produce, such as vegetables (84%) and fruit (12%).
- Meat and meat byproducts, including beef (30%), poultry (30%), pork (10%), fish (5%), and other meats (6%).
- Dairy products, including milk (21%), eggs (20%), cheese (13%), and butter (1%).
- Other items such bread (22%).

Interestingly, in naming Manitoba food, respondents did not restrict themselves to Manitoba grown or raised food, but included food processed or made in the province, such as bread, sandwich meats, potato chips, and pasta. It is unclear whether respondents believe the ingredients for these processed items are local or not.

See Table 10 for results.

Table 10: Manitoba food people buy *Q14. What food do you buy that is Manitoban?*	
	% (n=791)
Produce	
Vegetables	84%
Fruit	12%
Meat	
Beef	30%
Poultry	30%
Pork	10%
Meat (non-specified)	6%
Fish	5%
Sandwich meets/Maple Leaf meats	2%
Lamb	1%
Dairy	
Milk	21%
Eggs	20%
Cheese	13%
Other	
Bread	22%
Honey	8%
Chips	1%
Butter	1%
Pasta	1%
Other	3%
Don’t know/no response	6%

Note: Respondents could choose more than one response. Column will sum to more than 100%.

3.3 Manitoba food buying habits

We asked respondents who say they buy Manitoba food why they buy them.

- Over 4 respondents in 10 say they buy Manitoba food because they help to support Manitobans, farmers, and the local economy.

- Just under 3 in 10 say they buy Manitoba food because it is of a higher quality than food from elsewhere; specifically, respondents speak of Manitoba food as fresher, healthier, and better tasting.

- About 1 respondent in 7 buys Manitoba food because it is available at the store in which they shop; similarly, 1 in 7 says they buy it because it is from Manitoba or homegrown.

- About 1 respondent in 10 says they buy Manitoba food because it is safer to eat than food from elsewhere, partly due to the fact that they know where the food is coming from.

These and other reasons for buying Manitoba food are shown in Table 11.

Table 11: Why people buy Manitoba food
Q15. Why do you buy Manitoban food?

	% (n=791)
Support local economy/farmers/people	42%
High quality (e.g., fresh, healthy, tastes better)	28%
It is available/there/in the store	14%
It is Manitoban/homegrown	14%
Safer/know where food comes from	9%
Less expensive	7%
Preferred choice	5%
Better for environment	2%
By accident/not a choice	2%
See advertising/labeling	1%
Just because/no reason	1%
Other	2%
Don't know/no response	6%

Note: Respondents could choose more than one response. Column will sum to more than 100%.

We asked respondents why they do not buy Manitoba food, and asked those who do, why they do not buy more Manitoba food. The most common barriers to not purchasing Manitoba food are the availability of, and being able to identify such food.

- **Awareness.** Many respondents say they do not buy Manitoba food because they do not know which food is Manitoban (21%), in part, this is because they admit they do not read labels, but also because they feel such food is not well advertised.

- **Availability.** Many say they cannot find Manitoba food in the grocery stores in which they shop (18%), thus it is more convenient to buy other food. Other respondents say that some food is not grown in Manitoba, even among food that can be found year-round.

- **Buy what they need.** Some say they already buy as much as they need, and cannot buy any more (11%), or they already buy a lot of Manitoba food.

- **Other barriers.** Some say they always buy the cheapest food, which is not always Manitoba food (9%) or that they are not interested or do not care where the food they buy is from.

Table 12 shows these and other reasons given by respondents as to why they do not buy Manitoba food.

Table 12: Why people do not buy more Manitoba food *Q16. Why do you not buy <more> Manitoban food?*	
	% (n=800)
Awareness	
Don't know which food is Manitoban	21%
Don't read labels/where food is from	5%
Manitoba food is not advertised	2%
Availability	
Not available in my store or area/can't find them	18%
Some food is not Manitoban	7%
Not available all year round/seasonal	6%
More convenient to buy other food	3%
Already buy what they need	
Buy as much as need/can't buy more food	11%
Already buy enough Manitoba food/buy a lot	6%
Other	
Buy cheapest food/Manitoba food too expensive	9%
Don't care about Manitoba food/not important	6%
Have a garden/hunt	4%
Other	2%
Don't know/no response	16%
Note: Respondents could choose more than one response. Column will sum to more than 100%.	

3.4 Reasons for buying Manitoba food

We tested 11 statements about Manitoba food to determine respondents' perceptions of them compared to food that comes from outside of the province.[2] Generally, respondents have a very positive impression of food that is grown and produced in Manitoba.

- Almost all respondents agree that Manitoba food *helps local family farms* and *helps the economy*. In both cases, 86% of respondents strongly agree. Conversely, 2% or less at least somewhat disagree with either statement.

- Slightly more than 9 in 10 agree that Manitoba food *is fresher*, including 67% that strongly agree. About 3% disagree at least somewhat.

- About 3 in 4 agree that Manitoba food *tastes better* (33% strongly agree) or *are of higher quality* (27% strongly agree). In both cases, 12% disagree at least somewhat.

---

2 The question read: (***Q18-28) I'm going to read some statements about Manitoba food and I'd like you to tell me if you agree or disagree with each. It doesn't matter if you have bought Manitoba food before, we are just looking for your impressions. Compared to the same food that comes from outside the province, Manitoba food…***

- About 7 in 10 agree that Manitoba food is *better for the environment* (37% strongly agree), *safer* (31% strongly agree), and *better for their health* (26% strongly agree). Between 12% (better for the environment) and 17% (safer) disagree at least somewhat.

- About 2 in 3 agree that Manitoba food is *more nutritious* than food from outside the province, including 25% who strongly agree. About 1 in 5 disagree at least somewhat with this statement, including 4% who strongly disagree. Respondents living in a household earning less than $40,000 annually (39%) are most likely among income groups (ranging from 18% to 21%) to strongly agree with this statement.

- About 4 in 10 agree that Manitoba food is more likely to *be organic* than food from elsewhere, while just 11% strongly agree. About 3 in 10 disagree, including 4% who strongly disagree.

- About 1 respondent in 3 agrees that Manitoba food is *more expensive* than other food, including just 6% who strongly agree. Conversely, almost half of respondents somewhat (38%) or strongly (10%) disagree. Others say they don't know (18%).

Figure 3 shows those who agree with these statements.

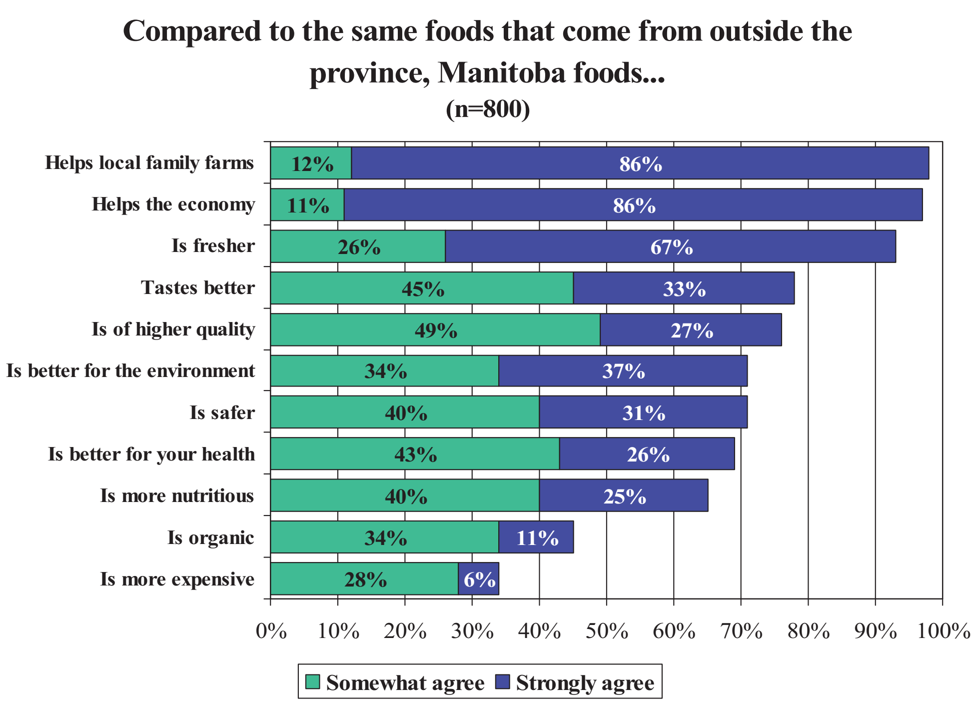

Figure 3

When asked what they think is the most important reason to buy Manitoba food, three reasons dominate responses.

- Almost 6 in 10 respondents think the most important reason is because it helps the economy and the province.

- One in 4 say the most important reason is that it helps local farmers.

- One in 5 say it is because Manitoba food is of a better quality or fresher than food from elsewhere.

See Table 13 for results.

Table 13: Most important reason for buying Manitoba food
Q29. What do you think is the most important reason to buy Manitoba food?

	% (n=800)
Helps the economy/province	56%
Helps local farmers	25%
Better quality food/fresher	20%
Helps the environment	7%
It's from Manitoba/local	6%
Lower food costs/less expensive	4%
It's available/in the store	2%
Know where food is coming from	2%
Support local businesses	2%
Other	1%
No reason	<1%
Don't know/no response	3%

Note: Respondents could choose more than one response. Column will sum to more than 100%.

4.0 Motivators to purchase Manitoba food

Below we examine some motivators for purchasing Manitoba food, including price, labelling, and availability.

4.1 Key motivators

We asked respondent to tell us what they think would encourage people to buy more Manitoba food. Respondents make the following suggestions.

- **Awareness.** Many suggest that to encourage people to buy more Manitoba food, they need to be made aware of it through better advertising or education (36%), better labelling that clearly identifies food as being Manitoban, or having a Manitoba food section in their grocery store.

- **Lower price.** Several say if Manitoba food were cheaper than food imported from elsewhere, that would encourage people to buy (23%).

- **Availability.** Some say that to encourage people to buy Manitoba food it must be easily available. There needs to be more types and varieties of Manitoba food available (8%) and that more stores across Manitoba need to stock Manitoba food (7%).

- **Other.** Some believe that people need to be made aware of the benefits of buying Manitoba food for example, it is healthier and fresher than alternatives (6%), it is safer with less pesticides, or that it helps local farmers, or that it is safer.

The suggestions made by respondents tend to mirror the reasons they do not buy more Manitoba food (as shown in Table 12). As such, these suggestions address the barriers they had previously identified, in particular: a lack of knowledge of what food is from Manitoba (addressed by advertising and labelling), cost (cheaper than other food), and accessibility of food (increase stock and number of stores that carry Manitoba food).

See Table 14 on the next page.

Table 14: Encourage others to buy Manitoba food *Q30. What would encourage more people to buy Manitoba food?*	
	% (n=800)
Awareness	
Better advertising	36%
Better labeling	18%
Manitoba Food section in stores	6%
Lower price	
Cheaper than other food	23%
Availability	
Increase availability/stock	8%
Increase availability at stores	7%
Other	
Make aware of health benefits/freshness/quality	6%
Helps farmers	2%
Safer/less pesticides	1%
Other	3%
Nothing	<1%
Don't know/no response	13%
Note: Respondents could choose more than one response. Column will sum to more than 100%.	

4.2 Price

As shown in Table 15, when asked about what they expect to pay for Manitoba food:

- More than 4 in 10 respondents expect to pay *less* for Manitoba food compared to the same food that comes from outside the province.
- About the same number, more than 4 in 10, expect to pay the same amount for Manitoba food.
- Just 1 respondent in 10 expect to pay more for Manitoba food.

While we did not ask respondents directly why they thought it would be more or less expensive, we suspect that consumers believe Manitoba food will be less expensive because it does not have to travel as far.

Table 15: Expectations of price for Manitoba food *Q31. Compared to the same food that comes from outside the province, would you expect to pay more, about the same, or less for Manitoba food?*	
	% (n=800)
More	9%
About the same	45%
Less	44%
Don't know/no response	3%
Note: Column may not sum to 100% due to rounding.	

We asked those who expect to pay more or less for Manitoba food how much more or less they expect to pay.

- On average, those who expect to pay less expect to pay about 16% less, ranging from 2% to 80% less. However, almost half expect to pay 10% or less for Manitoba food compared with the same food that comes from outside the province.

- On average, those who expect to pay more expect to pay 17% more, ranging from 2% to 88% more.[3] Similar to those who expect to pay less, about half expect to pay up to 10% more for Manitoba food.

As Table 16 shows, among those who expect to pay a different amount for Manitoba food about half expect to pay 10% or less of the price for the same food that comes from outside of Manitoba. Many did not know how much more or less they would expect to pay.

Table 16: Paying more or less for Manitoba food
Q32. As a percentage, how much more would you expect to pay for Manitoba food?
Q33. As a percentage, how much less would you expect to pay for Manitoba food?

	%	
	Paying less (n=355)	**Paying more (n=68)***
10% or less	47%	49%
11% to 24%	22%	18%
25% or more	15%	15%
Don't know/no response	15%	19%
Average %	16%	17%**

* Caution sample size is small.
** One respondent who says they expect to pay 230% more has been removed from the calculation of the average.
Note: Columns may not sum to 100% due to rounding.

4.3 Other motivators

We asked respondents whether they agree with four statements about buying Manitoba food.

- More than 9 in 10 respondents agree at least somewhat with the statement that *they would buy more Manitoba food if they were available in stores in which they now shop*, including 74% who strongly agree.

- More than 9 respondents in 10 also agree at least somewhat that *if they knew which food was Manitoban, they would be more likely to buy them*, including 69% who strongly agree.

- About 8 respondents in 10 agree *they would visit stores they do not currently shop in if they had the Manitoba food they wanted and the store was conveniently located*;

---

3 One respondent says they expect to pay 230% more for Manitoba food.

however, just 44% strongly agree. Conversely, less than 1 in 5 disagree, including 4% who strongly disagree.

- Seven respondents in 10 agree they would *go out of their way to shop for Manitoba food if they knew where they could be found*, including 30% who strongly agree. Conversely, almost 3 in 10 disagree, including 9% who strongly disagree.

There are no statistically significant differences among demographic subgroups and their agreement with any of the four motivators tested. See Table 17 for results.

Table 17: Agreement ratings with motivators to buy Manitoba food
Q34-37 Please tell me if you agree or disagree with each of the following statements.

	Agreement % (n=800)		
	Strongly agree	**Somewhat agree**	**Disagree (Somewhat/ Strongly)**
I'd buy more Manitoba food if they were available in stores in which I now shop	74%	21%	4%
If I knew which food was Manitoban, I would be more likely to buy them	69%	27%	3%
I'd visit stores I do not currently shop in if they had the Manitoba food I wanted and they were conveniently located	44%	38%	15%
I'd go out of my way to shop for Manitoba food if I knew where they could be found.	30%	40%	29%

Note: The don't know/no response column is not shown in this table, but is included in the calculations. Therefore, rows may not sum to 100%.

4.4 Identifying Manitoba food

We asked respondents to rate the usefulness of three different ways they could identify Manitoba food.

- Of the three methods, *clear labelling that indicates that food is Manitoban* was said to be the most useful. Almost all respondents say it is at least somewhat useful, including 85% who say it is a very useful way to identify such food.

- About 8 in 10 respondents say that *having ads in local newspapers telling you which stores have Manitoba food* is useful, but just 44% strongly agree.

- Slightly less than 6 in 10 say that a *website that tells them what stores have Manitoba food* is useful, including only 27% who say it is useful. However, 4 in 10 say such a website is not useful, including 24% who say it is not useful at all.

See Table 18.

Table 18: Usefulness of identifying Manitoba food *Q38-40. I'm going to read a number of ways that might make it easier for you to find and identify Manitoba food. As I read each, please tell me how useful it would be for you.*			
	Usefulness % (n=800)		
	Very useful	**Somewhat useful**	**Not useful**
Clear labelling that indicates that food is Manitoban	85%	12%	2%
Ads in local newspapers telling you which stores have Manitoba food	44%	36%	19%
A website that tells you what stores have Manitoba food	27%	31%	40%
Note: The don't know/no response column is not shown in this table, but is included in the calculations. Therefore, rows may not sum to 100%.			

Table 19 shows the usefulness of *a website that tells them what stores have Manitoba food* by various demographic subgroups.

- Older respondents are less likely to report such a site as useful. Respondents age 65 and older (39%) are the least likely to say that a website would be useful.
- Perhaps reflecting their age (as older respondents would be less likely to have children in the household), those with children (69%) are more likely to say this website would be useful than those without children (52%).

There were no statistically significant differences between demographic groups and their rating of the usefulness of *labelling* or *ads in local newspapers*.

Table 19: Usefulness of a website: A profile	
	Useful (Somewhat or Very) % (n=800)
Total	58%
Gender	p=.882
Women	58%
Men	58%
Age	**p=.000**
18 to 39	**66%**
40 to 64	**62%**
65 and older	**39%**
Location	p=.005
Winnipeg	62%
Outside of Winnipeg	51%
Income	p=.004
Under $40,000	49%
$40,000 to $60,000	59%
$60,000 to $80,000	65%
Over $80,000	67%
Children in household	**p=.000**
Yes	**69%**
No	**52%**

4.5 Importance of buying Manitoba food

Overall, almost all respondents think it is at least somewhat important for Manitobans to buy Manitoba food, including 70% who say it is *very important*. Just 3% of respondents say it is not important to buy Manitoba food. See Table 20.

Table 20: Importance of buying Manitoba food *Q17. In general, how important is it for Manitobans to buy Manitoba food?*	
	% (n=800)
Very important	70%
Somewhat important	26%
Not very important	2%
Not at all important	1%
Don't know/no response	1%

As shown in Table 21, there is one statistically significant difference between demographic groups. The youngest age cohort (age 18 to 39) is less likely than those age 40 years of age and older to say that buying Manitoba food is *very important*. While not statistically significant, those living outside Winnipeg are also more likely than Winnipeg residents to say buying Manitoba food is very important.

Table 21: Importance of buying Manitoba food: A profile	
	Very important (Rating of 4 out of 4) % (n=800)
Total	70%
Gender	p=.027
Women	72%
Men	64%
Age	**p=.000**
18 to 39	**53%**
40 to 64	**75%**
65 and older	**73%**
Location	p=.002
Winnipeg	67%
Outside of Winnipeg	75%
Income	p=.694
Under $40,000	74%
$40,000 to $60,000	70%
$60,000 to $80,000	66%
Over $80,000	70%
Children in household	p=.029
Yes	64%
No	74%

5.0 Conclusion

To conclude we return to the purposes of this research.

Current food buying habits of Manitoban

Manitobans typically visit stores 11 times per month to shop for groceries, whether to pick up some milk or to replenish household supplies. This suggests they are in stores that sell groceries at least 2 or 3 times per week. The typical Manitoban shops in a variety of locations (on average, three different types of stores), but large chain grocery stores dominate both in terms of frequency of visits and amount spent. Most Manitobans admit that at least some of their food purchases are spur of the moment, that is, purchases they had not planned to make before entering the store.

Almost all Manitobans currently report buying Manitoba food (or food they believe to be Manitoban) at least once a month, and a majority do so weekly. This food most commonly includes produce, meat and dairy products.

Perceptions about buying Manitoba food

Most Manitoban shoppers have a very good impression of Manitoba food. When asked why they buy Manitoba food, most commonly they do so because it benefits others, that is: helping to support the local economy, local farmers, or local retailers. Many also buy it because it benefits them by being healthier, fresher, or safer than the alternatives.

Most Manitobans want to purchase Manitoban food. In fact, almost all think it is at least somewhat important that Manitobans buy Manitoba food (including a significant majority who say it is very important.) When asked why they do not buy more Manitoba food, most say it is because they do not know which food is Manitoban or that Manitoban food is not readily available. Conversely, when asked how to encourage more people to buy Manitoban food, most say it needs to be easily available to people and people need to be made aware of it through advertising and labelling.

Definition of Manitoba food

Many respondents would define Manitoba food quite narrowly saying it refers to food that is grown or raised in Manitoba. Others define such food, not by where it is produced, which they feel is self-evident, but rather by its attributes, such as “good”, “excellent”, “fresh”, and “healthy.” Still others associate Manitoba food with a particular type of food like vegetables. Some would extend the definition to food processed in Manitoba.

When we defined Manitoba food as food *not only grown in Manitoba, but also processed or manufactured in the province,* it appears to have little impact on their positive perceptions of Manitoba food. Given this definition, almost all respondents agree, and a majority strongly agree, that compared to the same food from outside the province, Manitoba food helps Manitoba farmers, helps the economy, and is fresher. A majority also agree that compared to food outside the province, Manitoba food tastes better, is higher quality, better for the environment, safer, and better for their health. However, there is a need to more clearly understand what consumers consider to be a Manitoba food, since even with our definition much is left for the respondent to assume.

Motivators for buying Manitoba food

Given the positive associations with Manitoba food and perceived importance of making such purchases, it would appear that Manitobans are predisposed to buy more Manitoba food. These results suggest that given the option our respondents would always chose Manitoba food. Thus, the biggest barrier to buying more appears to be consumers' ability to identify what products are Manitoban, and knowing where to get them. Almost all respondents agree (and the majority strongly agrees) that they would buy more Manitoba food if they were available at the stores in which they shop and if they were clearly labeled as such. While a majority also says they would go to stores they do not regularly shop in to get Manitoba food, this willingness will be tempered by factors such as location and cost.

Their willingness to go out of their way for Manitoba food may be more a demonstration of their belief that buying such food is important (because it supports local producers), but for all these good intentions, it is much less likely to result in sustained action than if it is available in a store they regularly visit. That being said, the typical grocery shopper visits three different types of stores (and may visit many different stores within a type) in a single month, increasing the opportunity that they would be exposed to Manitoba food in a store they current visit.

The vast majority of respondents say that clearly labelling a food as Manitoban would be very useful in making it easier for them to find and identify Manitoban food. A majority also says that local newspaper advertising and a website telling them which stores have Manitoba food would be useful (the later being much more useful to younger respondents). Again, while such information is useful, for most it is likely only actionable if it is a store they regularly shop in now.

Most respondents told us they would expect to pay about the same or less for Manitoba food as for the same food from outside the province. While this may be based on certain assumptions (such as transportation costs), it may also reflect their own experiences, since almost all claim to regularly purchase Manitoba food. However, the positive perceptions of Manitoba food and the desire to support Manitoba producers may not be enough for them to regularly pay more for this food. While higher prices may not stop such purchases altogether, it may reduce the frequency with which those purchases are made given a lower priced alternative.

Overall, Manitobans appear to strongly support the concept of promoting Manitoba food. They want to buy more Manitoba products and would do so if they knew which food was locally produced and if this food was available where they currently shop.

APPENDIX A

Questionnaire

PRA Inc.

CALL BACK INFORMATION SCREEN - LD CODE: 4107

Good evening/day, is this $N ? CALLBACK INFO: <NAME > <INFO1 > <INFO2 >

(ANYTHING IN UPPER CASE IS NOT TO BE READ TO RESPONDENT)

Continue with enrollment	1	D	=> INTR1

LD CODE - 4107

INTR1. Hello, this is _____ calling from PRA Inc., an independent research company based in Winnipeg. Today we are calling Manitobans to talk about their grocery shopping habits and the importance of various factors in choosing the products that you buy. ---> CONTINUE

Yes, continue	1	
SET CALLBACK	2	=> /INT01
TERMINATE CALL	9	=> /INT01

INTR2. I need to speak to the person who is mostly responsible for grocery shopping for the household. Would that be you?

Yes, continue	1	=> INTR3
No, person coming to the phone	2	=> /INTR1
No, person not available - SET CALLBACK	3	=> /INT01
TERMINATE CALL	9	=> /INT01

INTR3. The survey will take about 12 minutes. Do you have time now? (Let me assure you that we are not trying to sell you anything and none of the information your provide will be associated with you in any way.)

Yes, continue	1	=> Q1X
SET CALLBACK	2	=> /INT01
TERMINATE CALL	9	=> /INT01

INITIAL CALL STATUS SCREEN

------ RECORD CALL STATUS BELOW -------

YES, CONTINUE WITH SURVEY	01	N	
Hard appointment	04		=> NAME
Soft appointment	05		=> NAME
Not in service	10		=> END
Fax/Modem line	11		=> END
Business line	12		=> END
Household refusal	20		=> END
Respondent refusal	21		=> END
Respondent not available	22		=> END
Refusal at introduction	23		=> END
Termination - Mid interview	24	N	=> END
Busy	30		=> END
No answer	31		=> END
Answering machine	32		=> END
Other	50	O	=> END
Language/Health/Hearing problem	60		=> END
Non-qualified	70		=> END

Q1X. First, I'd like to ask you a few questions about your household's grocery shopping. --
-> CONTINUE
CONTINUE.. 1 D

Q2. During a typical month, how many times do you shop for groceries at... ...Warehouse stores (e.g., Costco)
$R 1 35
None / less than 1.. 00
Don't know 88
No response 99

Q3. During a typical month, how many times do you shop for groceries at... ...Department stores (e.g., Walmart)
$R 1 35
None / less than 1.. 00
Don't know 88
No response 99

Q5. During a typical month, how many times do you shop for groceries at... ...Convenience stores (e.g., 7-11)
$R 1 35
None / less than 1.. 00
Don't know 88
No response 99

Q6. During a typical month, how many times do you shop for groceries at... ...Specialty stores (e.g., butcher shops, fish shops, fruit and vegetable shops)
$R 1 35
None / less than 1.. 00
Don't know 88
No response 99

Q7. During a typical month, how many times do you shop for groceries at... ...Farmers' markets
$R 1 35
None / less than 1.. 00
Don't know 88
No response 99

Q1. During a typical month, how many times do you shop for groceries at... ...Large grocery chains (e.g. Safeway, SuperValue, Sobeys)
$R 1 35
None / less than 1.. 00
Don't know 88
No response 99

PRA Inc.

Q4. During a typical month, how many times do you shop for groceries at... ...Small independent stores
$R 1 35
None / less than 1 00
Don't know 88
No response 99

Q8. During a typical month are there any other places you shop for groceries?
Yes (specify) .... 66 O
No .... 00 X => Q9
Don't know .... 88 X => Q9
No response .... 99 X => Q9

Q8. How many times in a typical month do you shop for groceries at <q8_O>?
$R 1 35
None 00
Don't know 88
No response 99

Q9. Thinking about the amount you spend on groceries in a typical month, of the stores you mentioned, at what store would you spend the greatest amount in total on food?
Warehouse stores (e.g., Costco) .... 02 => DUMM2
Department stores (e.g., WalMart) .... 03 => DUMM2
Convenience stores (e.g., 7-11) .... 05 => DUMM2
Specialty stores (e.g., butcher shops, fish shops, fruit and vegetable shops) .... 06 => DUMM2
Farmers' markets .... 07 => DUMM2
Large grocery chains (e.g., Safeway, SuperValue, Sobeys) .... 01 => DUMM2
Small independent stores .... 04 => DUMM2
Other (specify) .... 66 O => Q10
Don't know .... 88 X => Q10
No response .... 99 X => Q10

PROBLEM: SAID THEY SPEND THE MOST MONEY AT <q9 > BUT GO TO THAT STORE LESS THAN ONCE A MONTH. CHANGE AMOUNT OF TIMES THEY GO THERE (Q1-Q8) OR CHANGE WHICH STORE THEY SPEND THE MOST MONEY AT (Q9) OR LEAVE AS IS BUT GIVE EXPLANATION
CHANGE STORE THEY SPEND MOST AT (Q9) .... 01 => Q9
CHANGE NUMBER OF TIMES THEY VISIT THE STORE IN A MONTH (Q1-Q8) 02 => Q2
LEAVE AS IS (specify) .... 66 O => Q10

=> /PROB
else => +1
if Q9=02 AND Q2=00,88,99

=> /PROB
else => +1
if Q9=03 AND Q3=00,88,99

=> /PROB else => +1 if Q9=05 AND Q5=00,88,99

=> /PROB else => +1 if Q9=06 AND Q6=00,88,99

=> /PROB else => +1 if Q9=07 AND Q7=00,88,99

=> /PROB else => +1 if Q9=01 AND Q1=00,88,99

=> /PROB else => +1 if Q9=04 AND Q4=00,88,99

Q10. Thinking about your typical grocery shopping experience, what percentage of your food purchases are spur of the moment? That is, purchases that you may not have planned to buy before entering the store.
$R 1 100
None 000
Don't know 888
No response 999

Q11. And typically, when do you or your family decide on what you are going to eat for dinner? Do you decide... (READ RESPONSES)
That morning 1
That afternoon 2
That night.. 3
The evening before 4
Days before or earlier 5
(DO NOT READ) Don't know 8
(DO NOT READ) No response 9

Q12X. I would now like to talk about the foods you buy when you are grocery shopping, specifically, where the foods you buy come from. ---> CONTINUE
CONTINUE.. 1 D

Q12. To start, how would you define Manitoba foods? (PROMPT: What does the term Manitoba foods say to you?)
Response (specify).. 66 O
Don't know.. 88 X
No response.. 99 X

Q13X. The next set of questions deal with Manitoba foods. By Manitoba foods we mean foods that are not only grown in Manitoba, but also processed or manufactured in the province. For the rest of the survey, please think about Manitoba foods as those foods that are grown, processed, or manufactured in Manitoba. ---> CONTINUE
CONTINUE.. 1 D

Q13. How often would you say you buy Manitoba foods? Would you say you buy Manitoba foods... (READ RESPONSES)
Once a week or more.. 4
Once every couple of weeks.. 3
Once a month.. 2
Less than once a month.. 1
Never.. 0 => DUMM1
(DO NOT READ) Don't know.. 8
(DO NOT READ) No response.. 9

Q14. What foods do you buy that are Manitoban? (DO NOT READ)
Beef.. 01
Poultry (e.g. chicken).. 02
Eggs.. 03
Milk.. 04
Vegetables.. 05
Fish.. 06
Lamb.. 07
Cheese.. 08
Honey.. 09
Bread.. 10
Other (specify).. 66 O
Don't know.. 88 X
No response.. 99 X

Q15. Why do you buy Manitoban foods? (PROMPT: Are there any other reasons?)
Reason (specify).. 66 O
Don't know.. 88 X
No response.. 99 X

=> *
if IF ((Q13=0),1,0)

.... 1
MORE.. 0

Q16. Why do you NOT buy <dumm1 > Manitoba foods? (PROMPT: Are there any other reasons?)
Reason (specify) .... 66 O
Don't know .... 88 X
No response .... 99 X

Q17. In general, how important is it for Manitobans to try to buy Manitoba foods? Would you say it is... (READ RESPONSES)
Very important.......... 4
Somewhat important.......... 3
Not very important.......... 2
Not at all important.......... 1
(DO NOT READ) Don't know 8
(DO NOT READ) No response 9

Q18-Q28 ROTATED
Q18X. I'm going to read some statements about Manitoba foods and I'd like you to tell me if you agree or disagree with each. It doesn't matter if you have bought Manitoba foods before, we are just looking for your impressions. ---> CONTINUE
CONTINUE.......... 1 D

Q18. Compared to the same food that comes from outside the province, Manitoba food... ...Tastes better Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?
Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know 8
No response 9

Q19. Compared to the same food that comes from outside the province, Manitoba food... ...Is fresher Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?
Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know 8
No response 9

Q20. Compared to the same food that comes from outside the province, Manitoba food... ...Is better for your health Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?
Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know 8
No response 9

Q21. Compared to the same food that comes from outside the province, Manitoba food... ...Helps local family farms Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know.......... 8
No response.......... 9

Q22. Compared to the same food that comes from outside the province, Manitoba food... ...Helps the local economy Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know.......... 8
No response.......... 9

Q23. Compared to the same food that comes from outside the province, Manitoba food... ...Is safer Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know.......... 8
No response.......... 9

Q24. Compared to the same food that comes from outside the province, Manitoba food... ...Is better for the environment Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know.......... 8
No response.......... 9

Q25. Compared to the same food that comes from outside the province, Manitoba food... ...Is more expensive Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know.......... 8
No response.......... 9

Q26. Compared to the same food that comes from outside the province, Manitoba food... ...Is more nutritious Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Strongly agree	4
Somewhat agree	3
Somewhat disagree	2
Strongly disagree	1
Don't know	8
No response	9

Q27. Compared to the same food that comes from outside the province, Manitoba food... ...Is of higher quality Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Strongly agree	4
Somewhat agree	3
Somewhat disagree	2
Strongly disagree	1
Don't know	8
No response	9

Q28. Compared to the same food that comes from outside the province, Manitoba food... ...Is more likely to be organic. Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree?

Strongly agree	4
Somewhat agree	3
Somewhat disagree	2
Strongly disagree	1
Don't know	8
No response	9

Q29. What do you think is the most important reason to buy Manitoba foods?

Reason (specify)	66	O
Don't know	88	X
No response	99	X

Q30. What do you think would encourage more people to buy Manitoba foods?

Response (specify)	66	O
Don't know	88	X
No response	99	X

Q31. Compared to the same food that comes from outside the province, would you expect to pay more, about the same, or less for Manitoba foods?

More	3
About the same	2
Less	1
Don't know	8
No response	9

ASKED OF THOSE WHO SAID "MORE" AT Q31
Q32. As a percentage, how much much more would you expect to pay for Manitoba foods? (ENTER PERCENTAGE)
$R 0 600

=> +1
if NOT Q31=3

Don't know 888
No response 999

ASKED OF THOSE WHO SAID "LESS" AT Q31
Q33. As a percentage, how much less would you expect to pay for Manitoba foods? (ENTER PERCENTAGE)
$R 0 100

=> +1
if NOT Q31=1

Don't know 888
No response 999

Q34. Please tell me whether you agree or disagree with each of the following statements. If I knew which foods were Manitoban I would be more likely to buy them. (Would that be strongly or somewhat agree/disagree?)
Strongly agree 4
Somewhat agree 3
Somewhat disagree 2
Strongly disagree 1
Don't know 8
No response 9

Q35. Please tell me whether you agree or disagree with each of the following statements. I'd buy more Manitoban foods if they were available in the stores in which I now shop. (Would that be strongly or somewhat agree/disagree?)
Strongly agree 4
Somewhat agree 3
Somewhat disagree 2
Strongly disagree 1
Don't know 8
No response 9

Q36. Please tell me whether you agree or disagree with each of the following statements. I'd visit stores I do not currently shop in if they had the Manitoba foods I wanted and were conveniently located. (Would that be strongly or somewhat agree/disagree?)
Strongly agree 4
Somewhat agree 3
Somewhat disagree 2
Strongly disagree 1
Don't know 8
No response 9

Q37. Please tell me whether you agree or disagree with each of the following statements. I'd go out of my way to shop for Manitoba foods if I knew where they could be found. (Would that be strongly or somewhat agree/disagree?)
Strongly agree.......... 4
Somewhat agree.......... 3
Somewhat disagree.......... 2
Strongly disagree.......... 1
Don't know.......... 8
No response.......... 9

Q38X. I'm going to read a number of ways that might make it easier for you to find and identify Manitoba-produced food. As I read each, please tell me, how useful it would be for you. ---> CONTINUE
CONTINUE.......... 1 D

Q38. Clear labeling that indicates that foods are Manitoban. Would this be very useful, somewhat useful, not very useful, or not at all useful?
Very useful.......... 4
Somewhat useful.......... 3
Not very useful.......... 2
Not at all useful.......... 1
Don't know.......... 8
No response.......... 9

Q39. A website that tells you what stores have Manitoban foods. Would this be very useful, somewhat useful, not very useful, or not at all useful?
Very useful.......... 4
Somewhat useful.......... 3
Not very useful.......... 2
Not at all useful.......... 1
Don't know.......... 8
No response.......... 9

Q40. Ads in local newspapers telling you which stores have Manitoba foods. Would this be very useful, somewhat useful, not very useful, or not at all useful?
Very useful.......... 4
Somewhat useful.......... 3
Not very useful.......... 2
Not at all useful.......... 1
Don't know.......... 8
No response.......... 9

Q41. Finally, I have just a few questions for statistical purposes. In what year were you born?
$R 1920 1990
Don't know/No response.......... 9999

Q42. What is the highest level of schooling that you have completed?
Elementary school 1
Some high school.. 2
Graduated high school 3
Vocational/technical college.. 4
Some university 5
Graduated university.. 6
Don't know / No response.. 9

Q43. Including yourself, how many people in total live in your household?
$R 2 12
One, lives alone .... 01 => Q47
Don't know / No response.. 99 => Q47

Q44. Are any under 18?
Yes.. 1
No .... 0 => Q47
Don't know / No response.. 9 => Q47

Q45. How many of those are under the age of 6?
$R 1 8
None 00
Don't know / No response.. 99

Q46. How many are between 6 and 17 years of age?
$R 1 8
None 00
Don't know / No response.. 99

Q47. Can you tell me the first 3 digits of your postal code?
A9A
Don't know / No response.. 999

Q48. And which of the following categories best describes your annual household income - that is, the total income before taxes of all persons in your household combined? Stop me when I reach your category. (READ RESPONSES)
Under $20,000 1
$20,000 to just under $40,000 2
$40,000 to just under $60,000 3
$60,000 to just under $80,000 4
$80,000 to just under $100,000 5
$100,000 or more.. 6
(DO NOT READ) Don't know 8
(DO NOT READ) No response.. 9

PRA Inc.

RECORD GENDER - DO NOT ASK

Those are all the questions I have - Thank you very much for your time and cooperation.
INTERVIEWER: RECORD GENDER BELOW
GENDER:

Female	1		=> INT99
Male	2		=> INT99
Undetermined	3		=> INT99

CALL RESULT

Completion	CO	D	=> END

CALL STATUS CODE PAGE

CALL STATUS CODES: ENTER THE CALL RESULT

-------------- END OF SURVEY ----------------

Completion	01	CD	=> END
Hard appointment	04	R	=> NAME
Soft appointment	05	R	=> NAME
Not in service	10	N	=> END
Fax/Modem line	11	N	=> END
Business line	12	N	=> END
Household refusal	20	N	=> END
Respondent refusal	21	N	=> END
Respondent not available	22	N	=> END
Refusal at introduction	23	N	=> END
Termination - Mid interview	24		=> END
Busy	30	N	=> END
No answer	31	N	=> END
Answering machine	32	N	=> END
Other	50	RO	=> END
Language/Health/Hearing problem	60	N	=> END
Non-qualified	70		=> END
(INT99) Completion	CO	N	

procedure 2 -> F6

INTERVIEWERS: ENTER YOUR COMMENTS ON THIS SCREEN

NOTES.

INTERVIEWER COMMENTS	1	DO

APPENDIX B

Call Record

PRA Inc.

Call record for Communications Services Manitoba

Buy Manitoba Food Survey

Call Record for Buy Manitoba Food Survey		
Outcome	**n**	**%**
A Total numbers attempted	8,709	100%
1. Not in service	1,771	20%
2. Fax	158	2%
3. Business	156	2%
Remaining	6,624	76%
B Total eligible numbers	6,624	100%
4. Busy	59	1%
5. Answering machines	1,571	24%
6. No answer	782	12%
7/8. Language/illness/incapability	336	5%
9. Selected/eligible respondent not available	531	8%
Remaining	3,345	50%
C Total asked	3,345	100%
10. Household refusal	116	3%
11. Respondent refusal	1,749	52%
12. Qualified respondent break off	624	19%
Remaining	856	26%
D Co-operative contacts	856	100%
13. Disqualified	53	6%
14. Completed interviews	800	93%
Refusal rate = (10+11+12)/C	2,489	74%
Response rate (D/B)	856	13%