

March 2011

# Regional Food System Strategy



MUSTEL GROUP  
MARKET RESEARCH

## ➤ Introduction

### Research Objectives

Mustel Group was commissioned by Metro Vancouver to conduct a public opinion survey related to the draft Regional Food System Strategy. The main objective of the research is to measure public support of particular strategies proposed in the RFSS. In addition, this year's measure will provide a benchmark for future comparisons of Metro Vancouver residents awareness and opinions of RFSS initiatives.

### Methodology

- 450 telephone interviews conducted with a random selection of Metro Vancouver residents, aged 18 years of age or older;
- Specific steps taken to ensure sample representative of residents including:
  - Random selection of households from up-to-date published listing;
  - Random selection of individual interviewed within household using 'next birthday' method;
  - Up to 6 calls per selected household/individual to minimize potential bias due to non-response;
- Field dates: March 21-28, 2011;
- The final data was weighted by age within gender and region to match the actual population in Metro Vancouver according to 2006 Census data;
- Translation provided in Cantonese, Mandarin and Punjabi;
- Margin of error: +/- 4.6% at the 95% level of confidence;
- Questionnaire used appended;
- Detailed computer tabulations presented under separate cover.



## ➤ Executive Overview

- The majority (93%) of residents agree that it is important to protect agricultural lands in the Metro Vancouver region, with 67% who feel it is 'very' important.
- The most common reasons why protecting agricultural land is important to residents are: protection of agricultural land/food sources, environmental impacts, and self sufficient food production, followed closely by concerns about overdevelopment, economic benefits and locally grown food being safer/healthier. Alternate views expressed by small groups are that food can be better produced elsewhere in the province, land should be developed, and a balance should be found to support a growing population.
- When asked what are the most important factors when buying or selecting food, top of the list is nutritional value, followed closely by locally grown or produced, and cost.
- Approximately nine-in-ten Metro Vancouver residents (86%) believe it is at least 'somewhat' important to buy locally grown or produced food, with 45% saying it is 'very' important.
- Residents identified economic benefits as the main reason locally grown or produced food is important; it builds the local economy and supports local farmers. Environmental benefits and production of healthier/fresher food are other perceived benefits.
- When grocery shopping, the majority (67%) of Metro Vancouver residents intentionally look for food that is grown or produced in BC.



## ➤ Executive Overview cont'd

- While the majority (73%) of those who shop for locally produced food report to find and identify such food at least 'somewhat' easily, only one-in-five find it is 'very' easy.
- Residents suggest that the best way to help them find or identify local food more easily is through labelling, and to a lesser extent through advertising.
- To measure residents' awareness, respondents were asked how food wasted in homes could be reduced. Overall, half of residents believe that the best way is to not over-buy. Additional measures cited include using leftovers, better menu planning and education.

### Summary

In summary, the majority of Metro Vancouver residents value and understand the benefits of local food production. Furthermore, most try to support local producers by attempting to buy and consume food that originates locally, but there is room for improvement regarding finding and identifying these items.

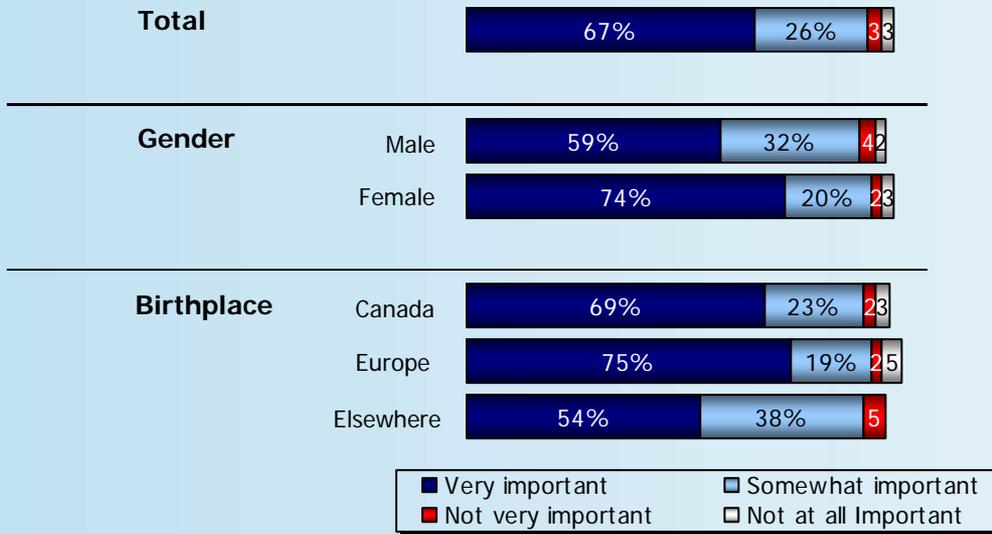


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# Key Findings



## ➤ Importance of Protecting Agricultural Lands



Base: Total (n=450)  
 Male (n=217)  
 Female (n=233)  
 Canada (n=305)  
 Europe (n=61)  
 Elsewhere (n=80)

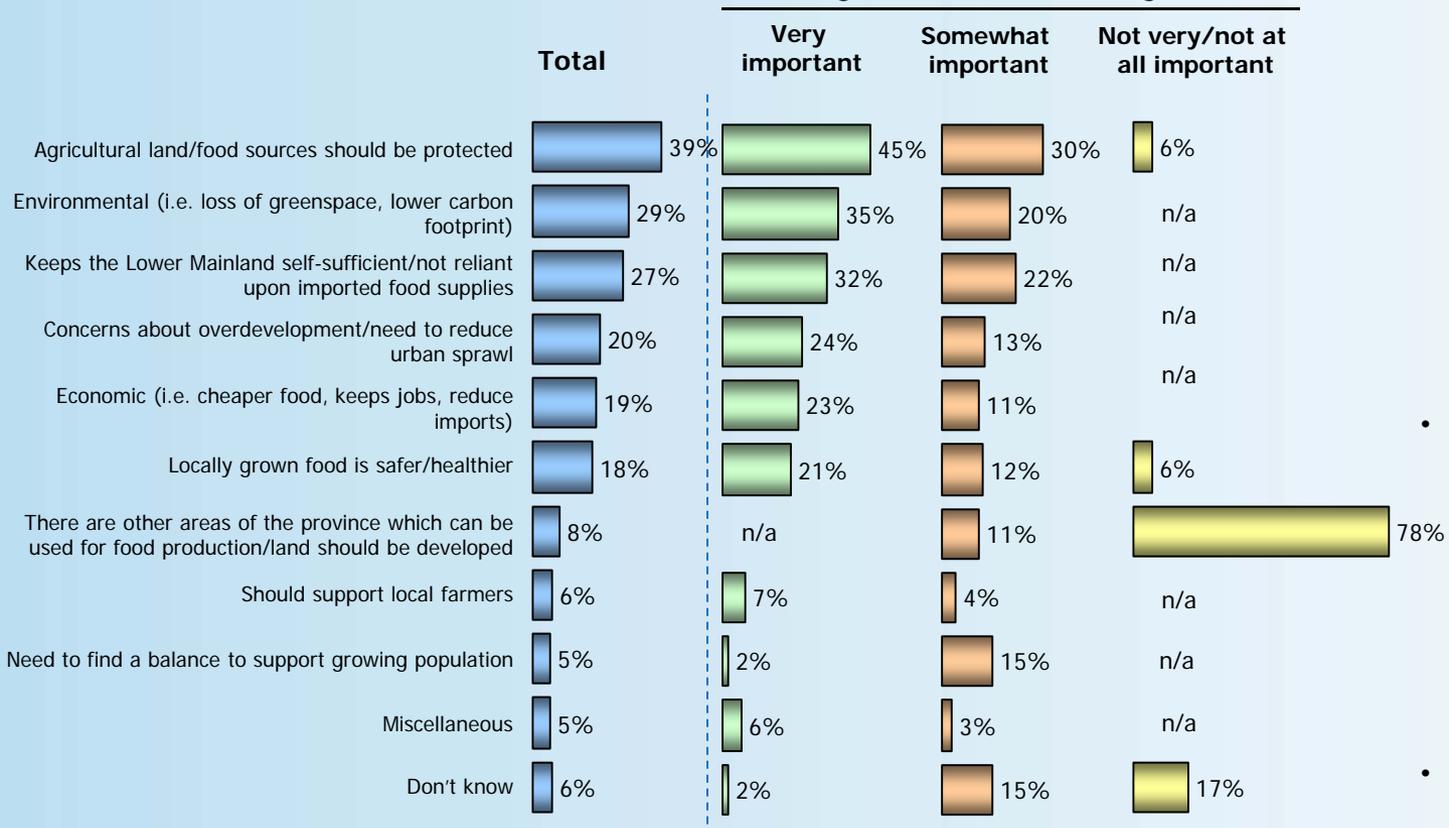
Q.1a) Over the years, a number of measures have been taken by local governments to protect agricultural land in the Metro Vancouver region. How important is it to you that we continue to protect agricultural lands in this region?

- The majority (93%) of residents believe it is at least 'somewhat' important to protect agricultural lands in this region, with 67% who feel it is 'very' important.
- Residents more likely to view this mandate as 'very' important are females (74% vs 59% of males) and those born in Canada and Europe (69% and 75% vs 54% born elsewhere).
- This opinion is consistent across all regions.



# Reasons Regarding Opinions of Agricultural Land Protection (Unprompted)

## Importance of the Protection of Agricultural Land in MV Region



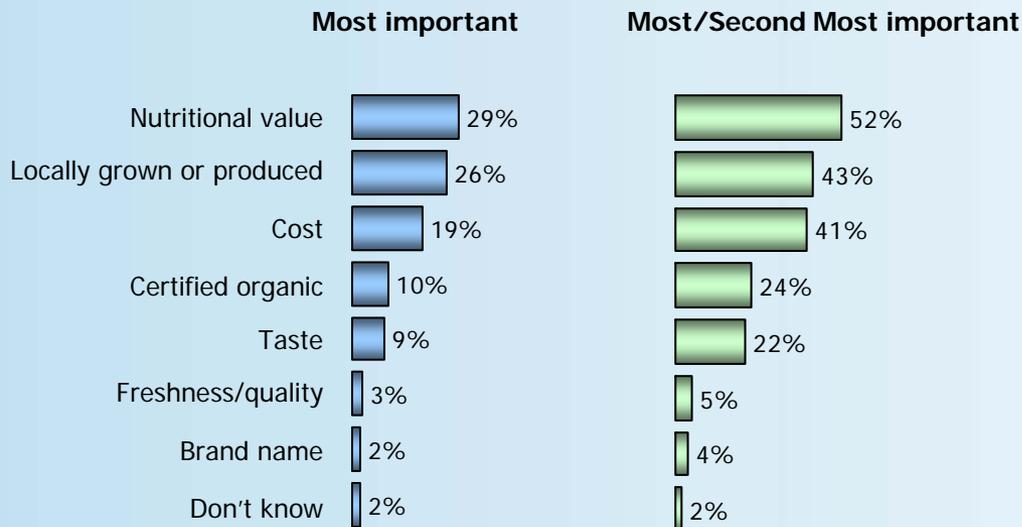
- Residents were probed for their reasons why or why not protecting agricultural land in Metro Vancouver is important. Overall, top mentions include protection of agricultural land/food sources, environmental impact, self sufficient food production, followed closely by concerns about overdevelopment, economic benefits, and locally grown food being safer/healthier.
- Keeping the Lower Mainland self sufficient and not reliant upon imported food supplies is mentioned more often by City of Vancouver residents (38%), whereas, environmental impact is of greater importance to those residing in Burnaby/New West (42%).
- Alternate views expressed by a small group (less than 10% each) include producing food elsewhere in the province, developing land, and finding a balance to support a growing population.

Base: Total stating an opinion (n=443)  
 Very Important (n=308)  
 Somewhat important (n=112)  
 Not very/not at all important (n=23)\*  
 \*Caution small base size

Q.1b) Why do you say that?



## ► Factors Considered when Buying or Selecting Food



Base: Total (n=450)

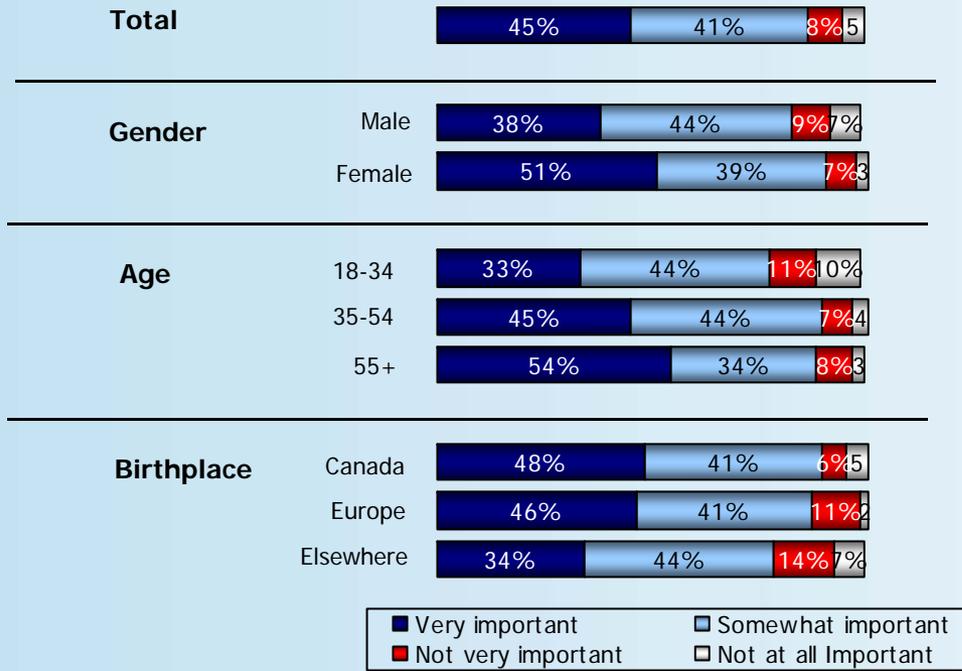
Q.2a) When buying or selecting food, people take into account many different factors – in general what is the most important factor for you?

Q. 2b) And what is second most important to you?

- Residents were asked of a list, which are the most important and second most important factors when buying or selecting food. Top of the list is nutritional value, followed closely by locally grown or produced, and cost.
- Food locally grown or produced is of greater importance to females (31% most important vs 20% of males) and those born in Canada and Europe (28% and 31% vs 16% born elsewhere), whereas cost is mentioned more often by males (23% vs 14% of females) and those 18 to 34 years of age (51%).
- In addition, food certified organic is mentioned most often by City of Vancouver residents.



## ► Importance of Locally Grown or Produced Food



Base: Total (n=450)  
 Male (n=217)  
 Female (n=233)  
 Canada (n=305)  
 Europe (n=61)  
 Elsewhere (n=80)

- Approximately nine-in-ten Metro Vancouver residents (86%) believe it is at least 'somewhat' important to buy locally grown or produced food, with 45% saying it is 'very' important.
- Locally produced food is less important to males, those under 35 years of age, and those who were born outside of Canada or Europe.

Q.2c) How important to you is it that the food you buy and consume is locally grown or produced?



## ➤ Benefits of Buying Locally Grown or Produced Food (Unprompted)

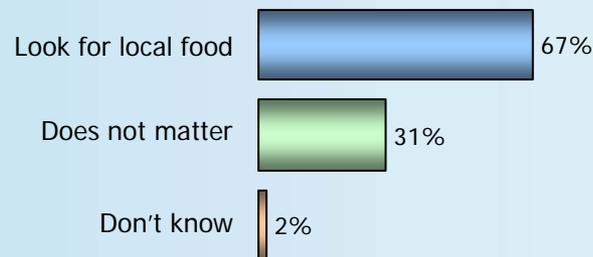
	<u>Total</u> (450) %
Builds the local economy	58
Supports local farmers	33
Environmental/lowers carbon footprint	24
Food is healthier/fresher	24
Cheaper (i.e. reduction of transportation costs)	14
Local farms meet high food safety standards	10
Like the way local food tastes	9
Knowing where my food comes from	8
Improves our food security	6
Encourages young people to get into farming	1
Miscellaneous	2
Don't know/No benefits	8

*Q.3) What do you see as the benefits of individuals and institutions buying food that is locally grown or produced?*

- When probed, the main benefit of locally grown or produced food is seen as economic related; it builds the local economy and supports local farmers. Environmental benefits and production of healthier/fresher food are other perceived benefits.
- These opinions vary by region with the benefit of building the economy mentioned more often by Richmond residents (75%), and environmental benefits mentioned more so by those who reside in the City of Vancouver (33%).



## ➤ Preference of Food Grown or Produced in BC



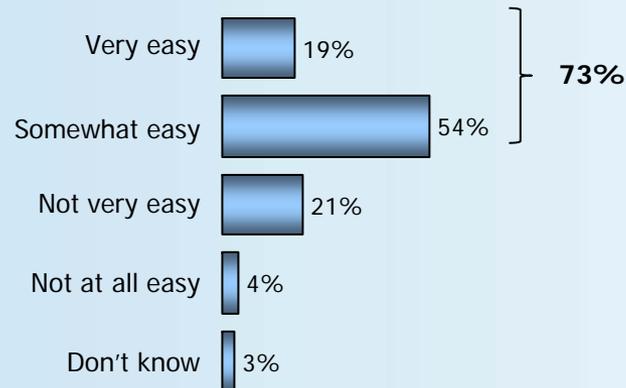
- When grocery shopping, the majority (67%) of Metro Vancouver residents intentionally look for food that is grown or produced in BC.
- Consistent with other findings, males, younger residents, as well as those born elsewhere are less likely to be concerned about the origin of their food.

Base: Total (n=450)

Q.4a) When you are grocery shopping, do you look for food that is grown or produced in BC, or does it not really matter to you?



## ➤ Accessibility of Locally Grown or Produced Food



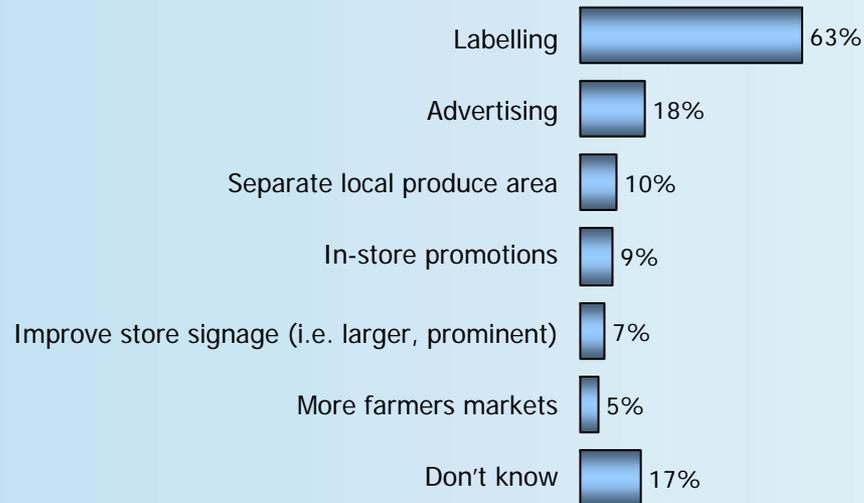
- While the majority (73%) of those who shop for locally produced food report to find and identify such food at least 'somewhat' easily, only one-in-five find it is 'very' easy.
- In order to encourage more residents to buy locally grown or produced food, it needs to be more easily identifiable and accessible.

Base: Total look for local food (n=308)

Q.4b) How easy is it to find and identify locally grown or produced food? Would you say...



## ➤ Ways to Find or Identify Local Food More Easily (Unprompted)



- Residents suggest that the best way to help them find or identify local food more easily is through labelling, and to a lesser extent through advertising.
- This opinion is consistent across gender, age groups, birthplace and all regions.

Base: Total (n=450)

Q.4c) What would help you find or identify local food more easily?



## Ways to Reduce the Amount of Food Wasted in Homes (Unprompted)



- To measure residents' awareness, respondents were asked how food wasted in homes could be reduced. Overall, half of residents state that the best way is to not over-buy.
- Additional measures cited include using leftovers, better menu planning and education.

Base: Total (n=450)

*Q.5) Estimates are that 50% of the food produced in Canada ends up as waste. This waste occurs all through the food supply chain but we know people throw out or compost a lot of food. This means not only is the food wasted, but the water, energy and other resources used to produce, process and transport this food is wasted. How do you think the amount of food wasted in homes could be reduced?*



## ➤ Demographic Profile

	Total (450) %
<b>Gender</b>	
Male	48
Female	52
<b>Age</b>	
18 to 24	12
25 to 34	17
35 to 44	21
45 to 54	20
55 to 64	14
65 to 74	9
75 years and over	7
Refused	1
<b>Total household size</b>	
1	18
2	30
3	15
4	19
5 or more	17
Refused	1
Average	3.0
<b>Children under age of 18 years living in household</b>	
Yes	34
No	65



## ► Demographic Profile (cont'd)

	<u>Total</u> (450) %
<b>Level of Education</b>	
High school or less	25
Technical or vocational school	12
University degree or college diploma	48
Post-graduate degree	14
Refused	2
<b>Household Income</b>	
Under \$40,000	17
\$40,000 to just under \$60,000	13
\$60,000 to just under \$80,000	12
\$80,000 to just under \$100,000	9
\$100,000 or more	26
Don't know/refused	22
<b>Employment</b>	
Full-time	52
Part-time	13
Unemployed	5
Homemaker and not employed outside the home	5
Retired	21
Student	10
Refused	1



## ► Demographic Profile (cont'd)

	<u>Total</u> (450) %
<b>Place of Birth</b>	
Canada	67
Europe	12
China	7
India/Pakistan	4
Philippines	2
Latin/South America	1
United States	1
Middle East	1
Korea	1
Vietnam	<1
Other	3
Refused	3



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# Questionnaire



## RFSS Questionnaire (B176)

### Intro/Screenener

Hello, I'm \_\_\_ of Mustel Group Market Research, a professional research firm. We are conducting a survey about community needs on behalf of Metro Vancouver regional district. Please be assured we are not selling or soliciting anything and all responses are kept strictly confidential.

May I please to speak to the person in this household, who is 18 years of age or over and whose birthday comes next?

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#### **Persuaders—only if needed:**

- This is strictly an opinion survey; we are not selling or soliciting anything.
- Your number was selected at random for participation in this research.
- All responses are strictly confidential and anonymous; your identity is never revealed to anyone else, including the client.
- The survey will take approximately 10 minutes to complete depending on your responses.
- IF ASKS WHO METRO VANCOUVER IS: Metro Vancouver formerly known as the GVRD delivers regional services on behalf of Lower Mainland municipalities.

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#### **A. GENDER [OBSERVE & RECORD]**

MALE

FEMALE

- 1a. Over the years, a number of measures have been taken by local governments to protect agricultural land in the Metro Vancouver region. How important to you is that we continue to protect agricultural lands in this region? READ SCALE

Very important  
Somewhat important  
Not very important  
Not at all important

- b. Why do you say that? PROBE: Any other reasons? PROBE FULLY.
- 2a. When buying or selecting food, people take into account many different factors – in general what is the most important factor for you? READ LIST. RANDOMIZE ORDER
- Cost
  - Nutritional value
  - Taste
  - Locally grown or produced
  - Certified organic
  - Brand name
  - READ LAST: Other: SPECIFY
- b. And what is second most important to you? REPEAT LIST



## RFSS Questionnaire (B176)

- c. How important to you is it that the food you buy and consume is locally grown or produced? READ SCALE

Very important  
Somewhat important  
Not very important  
Not at all important

3. What do you see as the benefits of individuals and institutions buying food that is locally grown or produced? PROBE: Anything else? PROBE FULLY. DO NOT READ LIST

BUILDS THE LOCAL ECONOMY  
IMPROVES OUR FOOD SECURITY  
SUPPORTS LOCAL FARMERS  
LIKE THE WAY LOCAL FOOD TASTES  
LOCAL FARMS MEET HIGH FOOD SAFETY STANDARDS  
ENCOURAGES YOUNG PEOPLE TO GET INTO FARMING  
KNOWING WHERE MY FOOD COMES FROM  
OTHER: SPECIFY

- 4a. When you are grocery shopping, do you look for food that is grown or produced in B.C., or does it not really matter to you?

Look for local food  
Does not matter

- b. IF LOOK FOR LOCAL FOOD IN Q.4a: How easy is it to find and identify locally grown or produced food? READ SCALE

Very easy  
Somewhat easy  
Not very easy  
Not at all easy

- c. What would help you find or identify local food more easily? PROBE: Anything else? PROBE FULLY. DO NOT READ LIST

LABELLING  
IN-STORE PROMOTIONS  
MORE FARMERS MARKETS  
ADVERTISING  
OTHER: SPECIFY



## RFSS Questionnaire (B176)

5. Estimates are that 50% of the food produced in Canada ends up as waste. This waste occurs all through the food supply chain but we know people throw out or compost a lot of food. This means not only is the food wasted, but the water, energy and other resources used to produce, process and transport this food is wasted. How do you think the amount of food wasted in homes could be reduced?  
PROBE: Any other suggestions? PROBE FULLY. DO NOT READ LIST

NOT OVER-BUYING  
BETTER MENU PLANNING  
KNOWING HOW TO PREPARE/COOK VEGETABLES  
USING LEFTOVERS  
UNDERSTANDING BEST BEFORE LABELS  
OTHER: SPECIFY

### **BASIC DATA**

We have just a few more questions to ensure we are speaking to a cross-section of people in the community.

- A. Into which of the following age categories may I place you?

18 to 24  
25 to 34  
35 to 44  
45 to 54  
55 to 64  
65 to 74 years  
75 years or better

- Bi. How many members including yourself are there living in your household?

- ii. IF MORE THAN ONE: Do you have any children under the age of 18 years living in this household?

- C. Are you: ACCEPT MULTIPLE RESPONSES

Employed: PROBE: Full-time or part-time  
Unemployed  
Homemaker and not employed outside the home  
Retired  
Or a student



## RFSS Questionnaire (B176)

D. Were you born in Canada or elsewhere? IF ELSEWHERE PROBE

Canada  
Elsewhere:  
China  
Europe  
India/Pakistan  
Japan  
Korea  
Latin/South America  
Middle East  
Philippines  
United States  
Vietnam  
Other SPECIFY

E. What is the highest level of education you have had the opportunity to complete?

**(READ)**

High school or less  
Technical or vocational school  
University degree or college diploma  
Post-graduate degree

F. Which of the following categories best describes your total annual household income before taxes?

Less than \$60,000  
Is that:  
Less than \$40,000  
\$40,000 to less than \$60,000  
Or \$60,000 or more  
Is that:  
\$60,000 to less than \$80,000  
\$80,000 to less than \$100,000  
\$100,000 or more

G. POSTAL CODE

Those are all the questions I have. Thanks you very much for your time.