Greenbelt Farmers' Market Network Research Survey 2012

Healthy Habits:

Farmers' Markets' Impacts on Customers

GREENBELT

INFORMA

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INFORMA

Executive Overview

Introduction

A total of 386 farmers' market shoppers completed the Greenbelt Farmers' Market Network (GBFMN) online survey in January-February 2012. Shoppers from 58 different farmers' markets took part in the survey with the concentration in two areas: Central Ontario (St. Catharines, Burlington, Hamilton, etc.) followed by Toronto.

Two Survey Comparison

Prompted by insights gained in the 2010 study, the 2012 survey's primary focus was on measuring the health impacts of farmers' markets.

- Earlier findings that the diets of regular farmers' market shoppers are positively affected were confirmed and expanded. They buy and consume both higher volumes of vegetables and fruit and a wider variety of them. Markets educate and inspire. They teach shoppers about origin, storage and preparation, leading to broader home menus that are then shared with friends and family members. Markets are pathways to building a framework of values and skills that lead to healthy eating habits.
- Where applicable, both the 2010 and 2012 shopper surveys measured the same factors: expenditure, history, frequency and reasons for shopping at markets, likes and dislikes, and types of items purchased. Generally, there was strong consistency between the two surveys on all these points, confirming the validity of the research results.
- A critical difference between the two surveys was the time of year they were conducted: the 2010 survey was distributed in the fall and the 2012 information was collected in the winter. An examination of seasonal eating patterns is therefore also highlighted in this report.

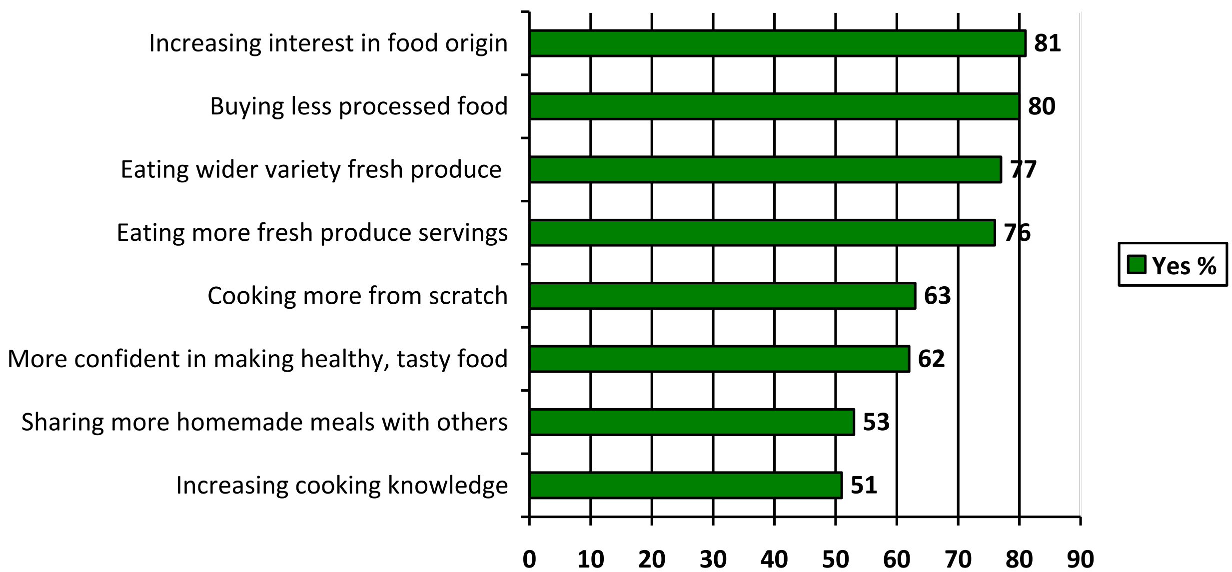
HEALTH RELATED FINDINGS

Impact on Diet

- The 2012 winter study focused on the impact of market shopping on selection, preparation and eating and the factors that are linked to these changes. Farmers' markets present a model emphasizing fresh, local, healthy food and the people who produce it; in the process markets teach shoppers about food and where it is grown.
- The majority of market shoppers (about seven in ten) say they experiment more with produce bought at the market, which leads to eating healthier meals. According to respondents, they are more likely to find information related to healthy diets at markets than at supermarkets.

- Market shopping also results in more cooking 'from scratch' (63% are doing this) based on market inspired recipes and increased confidence in their food preparation skills. The happy outcome is that half (53%) are sharing more meals with friends and loved ones.

Impact on food purchase and consumption



Question: As far as you can tell, has shopping at farmers' markets resulted in any ongoing changes? For each item below please indicate if as a result of shopping at farmers markets you are…

- The impact of farmers' markets on eating habits continues year round. Two thirds of shoppers maintain that they continue to eat the same volume of fresh produce regardless of the retail source and regardless of the season. Yet about the same number admits that supermarket shopping results in buying less healthy convenience/processed foods. The critical difference is that markets are healthy food focused.

- It is worth noting that shoppers self-describe their health status as being higher than the Canadian averages (Statistics Canada Study). Three quarters (75%) of shoppers say they are in Excellent or Very Good health compared to 60% of Canadians, and, unlike the national average, scores are virtually the same for both women and men and younger and older adults. One key difference among market shoppers is related to where they live: 83% of Toronto based shoppers peg their health status as being Excellent or Very Good compared to 71% for the Central Ontario area shoppers.

Impacts on Children

- Three in ten shoppers (31%) have one or more children; this incidence varies geographically, with a higher concentration in Central Ontario than in Toronto.
- Parents are more likely to 'always' attend markets with their children than to bring them on a shopping trip to the supermarket. The motivation is to expose their children to real live healthy, local food and the people who grow it. The majority (63%) of parents say that this experience not only shapes positive attitudes towards healthy, locally grown food, but it has resulted in their children eating more fresh market produce, and in half of cases, children are more willing to try new food items.

Environmental Impacts

- Markets have significant environmental benefits. As a consequence of focusing on local food, shoppers are deliberately favouring local over imports. Most shoppers (85%) are inspired to eat seasonally which leads to different buying and cooking patterns. They now seek out locally grown regardless of the season (fresh in season, frozen off season) and are eating more 'hardware' or vegetables that store well.
- 75% of shoppers are extending the season by canning, freezing etc.
- Shoppers appreciate that markets are environmentally friendly and that the low/no packaging market approach is just one manifestation of their 'green' status. Plus, shoppers report that they are motivated to waste less market produce; its freshness and origin identification are contributing factors.
- However, ingrained habits are hard to shift, and more than half (57%) of shoppers admit that they make produce choices regardless of the season. Off season lack of availability is a critical contributor to their reliance on imports.

WHAT ARE SHOPPERS BUYING?

The Magic of Markets

- The 2012 shoppers' survey confirms the 2010 study conclusion that markets function as the place to go for regular grocery items and more. Again, half of shoppers also source a particular item and satisfy an immediate gratification for a snack or a meal for in-home consumption. In 2012 we learned that one in ten shoppers find that some of their special food needs are met at the market.
- Again in 2012 we learned that the two main magnets are fresh, local, healthy, tasty food and the desire to support local farmers. Shoppers also value markets' friendly, relaxed and out of the norm ambiance for food shopping.

- One in two shoppers come to markets for organic choices and/or the chance to meet the producers.
- A strong minority (43%) rate the prices as reasonable, and 37% appreciate that markets sell things that aren't easy to find elsewhere. Markets build and reinforce communitarian values – on-site community events, social interaction and food education adds to the totality.

Items Bought and Frequency

- Fresh, in-season vegetables and fruit are at the top of the market shopping list for all visitors. Other staples such as eggs, bread/baking, herbs and cheese are more likely to be chosen occasionally.
- 'Nice to have' and more infrequently bought items, especially for people with larger size families who tend to focus on the fresh produce, include snacks, honey, coffee/tea, plants/seeds, chicken, readymade meals, cut flowers, maple syrup, jams, etc.

Other Sources of Local Food

- The winter 2012 study examined off-season shopping patterns and knowledge of year-round food sourcing. One key lesson is that options for obtaining locally produced food year round are a function of geography. Central Ontario area shoppers tend to go to supermarkets off season and 31% regularly turn to Wal-Mart/Costco, augmented by some who buy from on-farm/ roadside stands and, to lesser extent, independent grocery stores and pick-your- own operations. They are much less likely to turn to independents (grocery, butcher, baker, cheese store).
- In contrast, Toronto residents firstly look to independent/local green grocers and then source at national chains. Roadside stands/on-farm markets and pick-your-own play a smaller role in supplying City eaters with fresh, local produce, and 12% are buying a share of the crop/CSA.

MARKETS AND MAINSTREAM SOURCES

Comparing Farmers' Markets and Supermarkets

- The winter 2012 survey revealed that 'shop local' lessons learned at markets have set standards that most shoppers demand from supermarkets. In addition to seeking out locally grown food at supermarkets, shoppers compare the quality, taste, perceived nutritional benefits and appearance of market produce, and find supermarkets lacking on all four factors.
- Organic produce buyers (53%) report that they buy more of it from markets.
- Also, as we learned in 2010, shoppers appreciate that market produce delivers important economic benefits for the community and is better for the environment.

- The new learning in 2012 is that, comparing value for money, markets win over supermarkets according to half (53%) of shoppers. A large minority (44%) find that market produce lasts longer than equivalent supermarket produce. Shoppers seem to appreciate that markets engage eaters in a fair exchange that supports local agriculture and leads to healthy eating.
- While markets lead on many critical factors, supermarkets still reign as purveyors of ready to serve convenience food. Also we see that shoppers are more scattered when it comes to comparing prices at markets and supermarkets. About half of eaters think the two types of outlets are equivalent, while the remainder is divided as to whether markets or supermarkets are pricier.

MARKET SHOPPING DETAILS

Market Shopping Patterns

- While most of the farmers' markets represented in the 2012 winter survey are seasonal, the majority (60%) of shoppers were able to attend a year-round market in the winter. The remainder (38%) had no alternative to their local seasonal market. Toronto shoppers were better able to find a substitute, year-round market than people in other areas/Central Ontario.
- Spending patterns fluctuate for some off season shoppers; however, just over half (54%) tend to spend about the same from visit to visit, averaging **$35.40** ($37.80 Toronto/$32.30 Central Ontario). Eating seasonally results in higher average market spending ($38.85). The comparable in-season spending average in the fall 2010 survey was, not surprisingly, higher at **$40.10.**
- Shopping at markets is a habit for the majority of people who chose to participate in the study, who average 2.9 trips per month. And, this habit becomes ingrained over time, with the average shopper attending for 7.7 years (7.6 years in 2010). This pattern has become more entrenched over a longer period of time in markets located in Central Ontario.

Market Challenges

- Both studies confirm that market shoppers love their markets and are committed to this way of shopping. Nonetheless, as in 2010 it was confirmed that markets do pose a challenge for the time-starved shoppers given the limited hours and availability. Prices again emerged as a barrier; the gap between market and supermarket prices continues to be a concern for one in three Toronto shoppers. Other less significant market growth impediments that are specific to some markets include limited vendors and options, lack of access to credit/cash, and parking problems.

OTHER MARKET SHOPPING IMPACTS

Food Waste

- In the winter of 2012, we learned that markets appear to have a positive impact on reducing eatable food waste for a variety of reasons. Most shoppers make extra effort to make good use of their market purchases because they 'value' it. Also, recently harvested market produce appears to have a longer lifespan.

- Vendors allowing shoppers to buy only as much as they need can result in less waste. In addition, providing storage and preparation tips means there is less likelihood of waste.

- While most shoppers say they are aware of the amount of food they waste, the composition of the organic waste stream suggests otherwise. However, a large minority (39%) admits that they buy more and waste more when supermarkets offer produce specials.

LOOKING AHEAD TO SPRING 2012

- As in 2010, the winter 2012 study learned that shoppers are wedded to market shopping and intend to return to the markets in the spring. However, markets have competition from other large-scale retailers and an expanding network of consumer-direct options (farmgate, pick-your-own and CSAs). Where shoppers live is a significant predictor of where people source locally grown food.

- The intended market shopping frequency and spending for 2012 is on the upswing – two thirds will shop and spend as they did last year, while 30% intend to go to markets more often and to spend more money.

- The reasons for planning to spend more of their food budget at the market vary: markets pull more as supermarket appeal is declining; life circumstances have changed; there is a desire to eat more local and to direct more support to the local economy; and there is opportunity for transformative learning about food.

Suggestions for Improving Markets as the Place to buy Local Food

- As in the 2010 survey, the list of suggested improvements covers several issues. The leading request is to expand market availability (locations, hours, times and season) followed closely by references to vendors and what they sell – increase the number of options and the consistency and variety of items. Also, it again emerged that a minority of shoppers want a ban on or labelling of produce that is not grown locally or is sourced from the Ontario Food Terminal as opposed to grown by market vendors.

- Again, the need for increasing advertising and market promotions was identified, and one in ten who provided a suggestion would like market prices to be more affordable. Other lower frequency mentioned items included improving the parking, hosting more events, and providing more workshops on canning and food preparation.

Conclusions & Suggested Actions

Health Impacts

- Markets are diet change agents. Exposure to fresh, tasty looking produce picked at its peak means that the majority of shoppers are inspired to incorporate more new things and thus to eat healthier meals. The result is that many market loyalists are making more homemade food and reverting to the deeply embedded cultural pattern of commensality, that is, sharing more eating occasions with others.

The fact that markets are helping reshape diets could be a lever for funding from health organizations and government.

While the 2010 and 2012 studies indicate that farmers' markets and other alternative distribution network players are having a positive impact on eaters' consumption patterns, the extent of the impact begs further study.

Markets and the Next Generation of Eaters

- Parents want their children to be exposed to the good food lessons that are inherent to markets. In addition to markets' communitarian values, parents see that meeting the people who grow the food leaves an indelible impression and positively affects willingness to eat new foods sourced from the market.

Markets are child friendly, and possibly this can be enhanced by inviting input from parents. Perhaps parent-child drop-in centres and similar neighbourhood clubs could be encouraged to meet at the market, given the positive impact that markets have on shaping young children's attitudes to food and their willingness to try good things grown by Ontario farmers

Local Food Sourcing Behaviour and the Role of Farmers' Markets

- Market shoppers tend to be more local food/local economy oriented than the majority of food shoppers. Year-round local food **'loyalists'** spend more of their food dollars through alternative distribution channel venues: farmers' markets, independent grocery and specialty stores, and farm-connected options (farmgate, pick-your-own, CSAs and food buying co-ops). Yet adoption of ‘**loyalist’** behaviour is limited by access in communities where supermarket chains/power centres dominate and there are fewer independent food stores.

- Budget constrained food shoppers are forced to turn to cheap food sources which could include cut-price green grocers (who may or may not sell local) and discount food retailers/supermarket banners. Necessarily, their spending at farmers’ market is lower than average. However, some eaters are learning to maximize their food budget by canning, preserving, bulk buying and pick-your-own and adopting other thrifty patterns in order to buy/eat more local food.

Markets are encouraged to continue linking shoppers with workshops and learning sources for methods of maximizing their food budget and extending the season. Also, there appears to be a growing demand to expand funding for voucher programs that democratize access to fresh, healthy, locally grown food.

- Toronto market shoppers who tend to have many food retailing options were more critical of market prices – almost half (46%) find that they are not as good as those at supermarkets. In comparison, Central Ontario shoppers were much more likely to find market prices were either better than supermarket prices or the same.

The perceived price disparity between markets and supermarkets depending on location begs investigation. It would be helpful for markets to analyze the spread between prices of in-season produce depending on the type of outlet, given that the perceived gap may be less than imagined. Perhaps this study could be undertaken by a student according to directions set by the GBFMN.

The high regard for markets means that there is an opportunity to inform and influence opinion. There are several themes of importance, one being cheap food. While tackling the issue of pricing is complex, markets and other players in the local distribution channel network should play a role in educating consumers about the causes and impacts of Canada’s cheap food policy. Possibly, short, well written articles on this subject could be posted on market websites for interested shoppers.

Local Food Perceptions

- Beliefs and strongly held attitudes shape the behaviour patterns of ‘**loyalists’,** providing a constantly reinforcing network. The more they learn about local food/the food system and its impacts through the experience of coming to markets, the stronger their commitment to buying local. In sum, ‘**loyalists’** tend to view local as superior for a series of experiential, economic and community-based reasons.

- This survey reveals that market sourced produce has reset the standard for excellence. Compared to supermarket produce, farmers’ market produce is judged to be far superior: it’s fresher and better tasting and looking; it’s nutritionally and environmentally superior; and more money is retained in the local economy. Market shoppers are convinced that the food retail giants are not adapting to the evolving demand for local food.

Market promotions should continue to focus two messages: wonderful food and Ontario farmers. Where possible, provide evidence that freshly harvested local food is superior. Messages should reinforce shoppers' perceptions. Possibly GBFMN could develop some message templates with the aid of experts willing to offer their services pro bono. These templates could then be used and branded by individual market managers for online content, mini-posters, printed handouts, etc.

Also, the positive economic impacts of supporting local food deserve more attention given that the food sector is now a major Ontario employer and the source of new job growth. This point resonates with shoppers and with potential market funders.

Learning Local and Seasonal Adaptation

- Market shoppers learn that 'to everything there is a season' and are adapting by cooking and eating more seasonally. Winter menus incorporate more storage vegetables, and at least half of shoppers are extending the season by canning or freezing peak harvest local items.

As noted, markets are a trusted source of information on food storage, handling and preparation. While there are many players engaged in reskilling eaters, markets could play a role by featuring food writers and cooks at the markets. Readings by writers and demonstrations can add to the education value of markets and create a reason to attend, potentially drawing in first time or infrequent market visitors. Perhaps this content could be featured online in order to expand reach and impact, and publicists and publishers may be interested in organizing a food writer speaking tour of markets.

Markets may also find that shoppers would take the time to listen or converse with local sustainability experts who are well versed on local agriculture. The more people learn about it, the more the problems of the industrial food system become apparent.

Markets are Hothouses

- Markets are a modern day version of the old style general store: 'meet and greet' places where shoppers come not only for farm-fresh food and tempting snacks, but for conversation, music/performances, and personal service by local farmers and producers.

Market vendors should be encouraged to continue expanding their array of snacks and ready to serve meal components for busy shoppers in search of convenience items. Possibly new small scale food processors could be featured, providing an opportunity for them to pilot new recipes/items.

- Markets are a hothouse of experimentation where farmers educate, inspire and support shoppers by providing essential information on the produce they grow, as well as tips for storage and preparation, to help shoppers spread their cooking wings.

Markets and Waste

- Because most shoppers attach positive values to market sourced fresh food, they try to use it all up. The fact is freshly harvested produce results in less waste. Fortunately, the market inspired urge to try new items and recipes plus the aura of goodness results in low waste, unlike the supermarket knock-down prices that may result in buying more than they can quickly use.

- Despite the well documented amount of eatable food that is being thrown away (estimated at a minimum of 20% of all food purchases or $28 dollars per week for the average household), most respondents insist that they are aware of this pattern. Pending research on the food waste problem will help shed light on the reasons for this waste and provide insights on how to reduce it.

- Canadians are accomplished waste sorters; they are well versed in what can and cannot be recycled. Most market shoppers note that farmers' markets are low waste zones given the minimal packaging. Shoppers widely endorse diverting valuable recyclables materials from the waste stream.

Market education (onsite and online) could feature food waste reduction tips such as making compotes from very ripe fruit and vegetable stock from wilting vegetables. Possibly some older market shoppers can provide methods that were practiced by previous generations.

Encourage vendors to accommodate the varying volume needs of buyers in order to reduce food waste and maximize the range of items that shoppers can afford.

Profile of Market Shoppers

- Market shoppers tend to mirror the profile of Ontario − an aging population, smaller size households, declining incidence of children and more single, live-alone occupants − with one major exception: ethnicity. Most market shoppers were born in Canada.

The ability of farmers' markets to draw more new Canadians (South Asian, Chinese and African) is a challenge given their food preferences. Potentially the new entry of immigrant farmers who are growing ethno-cultural vegetables will help fill the gap and expand the diversity of market shoppers. Efforts should be made to cater to these segments by those managers of markets that are located in culturally diverse communities.

The overall goal of farmers' markets should be to increase market share in their local community. Current market shoppers are likely opinion makers who can influence friends and neighbours to have a taste of their local market. Possibly this can be encouraged by 'bring a friend' market promotions, tied in with specific onsite events.

Markets Now and in the Future

- While shoppers love their markets and return week after week, they wish that markets could be more convenient – more days, longer hours and longer seasons. The perceived higher price points are a barrier for some shoppers. As well, lack of choice and narrow selection of organic items at some markets can also pose restraints on spending.

- While people love the 'slow shopping' nature of markets, some participants would like their markets to be more attuned to the debit culture – Canadians have embraced debit purchasing. And, they would like to see market messages and promotional efforts in order to expand the markets' popularity/market reach.

Market managers may benefit from creating informal, kitchen table type sessions and one-on-one chats with a selection of local shoppers to generate ideas on strengthening the market and expanding outreach into the community. It makes good sense to tap into the tremendous amount of good will that exists among shoppers. Expanding outreach acknowledges that food markets are owned by their local community and that there are benefits in reaching out for various kinds of support available in the community. It could help to connect with local businesses and organizations that see the value of their local farmers' market.

Market managers and vendors are encouraged to continue expanding their online presence and to seek promotional opportunities in local media. Shoppers are hungry for farm stories and electronic farm vignettes/tours. Market managers might find volunteers who have the skills to create this content, given the number of tech-savvy students who are looking for experience and internships.

While providing debit access would add to the operating cost of markets, it should be explored in some market situations. Access to credit or debit might boost expenditure, given the trend toward a cashless economy.

Additional Ideas

Measure Market Size - Judging from these survey findings, local food shoppers are reaching out beyond the mainstream, supermarket chain dominated retail sector for reliable local food sources. Farmers' markets belong to other 'field to table' options including independent grocery stores/green grocers and specialty stores that appear to be in growth mode, particularly in the Toronto area. There also seems to be an increase in the number of CSA/farm-share options, farmgate outlets, U-pick operations, food buying clubs, food boxes, etc. that appeal to this sector of food shoppers. However, the actual size and composition of this shift in food buying to local alternatives has not been documented.

While GBFMN is one of the many players that is being affected by this increased demand to buy local food /support the local economy, a concerted effort to measure and understand this shift is needed. The findings would provide insights that would aid in channeling growth given limited resources. It could also help build the business case for more government funding.

Document and Track Health Impacts – As noted, farmers' markets are reorienting diets in a healthier direction that includes eating seasonally and favouring locally grown over imported items. Eaters are being reskilled on produce handling, storage and preparation. In addition to the benefits to health and the local economy, market shopping could be part of the solution to reducing the amount of eatable food that is being thrown out. The multi-dimensional contributions of markets deserve to be highlighted.

INCREASING ACCESS TO LOCAL PRODUCE – The ability to purchase fresh vegetables and fruit goes beyond access; at least one in five households cannot afford to buy adequate supplies of nutrient rich food, regardless of the source. One intervention − market voucher programs for low income residents piloted at farmers' markets in Ontario and British Columbia − generated multiple benefits. Affected families expanded their diets to include more fresh fruit and vegetables, children developed new healthy eating habits, market sales increased, and markets forged new partnerships with local agencies and donors. GBFMN is encouraged to continue exploring options to support these programs and expand their reach in mixed income communities. The goal is to make markets equitable and open to all shoppers.

SECTOR GROWTH AND UNDERFUNDING – The farmers' market sector demand appears to be on the upswing, while individual markets continue to struggle with underfunding. While there is no simple or easy route to obtaining a secure operating base, this critical issue continues to need attention. GBFMN and partners are encouraged to seek out innovative models that could be applied to this situation.

Study Aims

This study was conducted in winter 2012 to examine the impact of farmers' markets on the shoppers' health linked to food purchasing, preparation and eating patterns. The intent was to obtain a more detailed understanding of how the market experience is changing perceptions and behaviour about healthy locally grown/produced food. This exploration included measuring food buying habits in the winter months, the impacts on sources of locally grown fresh food, and the consequent consumption of fresh vegetables and fruit. It also provided updated data for comparing findings with the fall 2010 study of farmers' market shoppers.

Research Method

An online survey was conducted among 368 market shoppers (seasonal and year-round) drawn from 58 markets located in and around the Greenbelt.

Market shoppers were invited to complete the questionnaire using several approaches, including notices on Twitter and Facebook and invitations distributed at farmers' markets. Also, market managers for Greenbelt and area markets that have electronic newsletters (23% of markets surveyed in 2010) assisted by sending an e- invitation to participate in the survey to their customer database (see Appendix 1 for copy). A link to the survey was included. In return for completing the online survey, respondents had a chance to win market bucks that could be spent at their favourite market.

The questionnaire took approximately 10 to 12 minutes to complete online and included a variety of different types of questions: rating scales, open and closed ended, multiple choice, etc. (see Appendix 2 for copy). Trusted, long-term suppliers to Informa were responsible for programming and hosting the survey and then coding responses and generating data tables. Detailed computer tables with cross tabulations were based on a tabulation plan designed by Informa. The consultant then analyzed the data and prepared summary tables and this detailed report.

Profile of Respondents

Gender and Age

Eight in ten shoppers (79%) are female and 21% are male. The men who completed the survey tend to shop the market with higher frequency/weekly while women are more inclined to shop biweekly or less.

Markets appeal to a wide range of food shoppers from the age of 21 years to 70 years, with an average age of 41.5 years. Higher frequency shoppers tend to skew older (44.6 years); these older shoppers have a longer history of visiting farmers' markets. Older shoppers are less likely to go to markets in the winter compared to those who are younger (under 41 years). Toronto market shoppers tend to be younger (39 years on average) than those in the Central Ontario locations (average 43 years).

Education

Market shoppers tend to be well educated: 60% have university education and another 27% attended community college. Toronto shoppers are more likely to have attended university than the average (82%), while Central Ontario shoppers tend more to have community college backgrounds. It is also worth noting that university educated shoppers assess their health status as higher (65% excellent/very good) than those who do not have this type of post-secondary education (50% excellent/very good).

Occupation

Over four in ten (42%) indicated that they have professional positions, with another 16% engaged as managers/business owners. Minority segments include students (8%), retired (7%), sales/clerical positions (7%), skilled trade workers (4%) and homemakers (4%).

Country of Birth

Most shoppers (85%) were born in Canada; only a small segment is made up of new Canadians. However, it is encouraging to see that Toronto markets are slightly more likely to attract immigrants (21% of shoppers compared to 12% at Central Ontario locations). The pool of immigrant shoppers is shallow; they are most likely to have come from Western Europe and, to a lesser extent, USA and Asia.

Markets Locations and Markets

The majority (57%) of market shoppers who completed the survey live in Central Ontario locations and about one third (34%) reside in Toronto. There was also a scattering of shoppers in postal code area N (Western Ontario).

A total of 58 farmers' markets in and around the Greenbelt were represented in the survey. The markets/location of markets that study participants shopped at were, listed in order of relative significance in the sample: St.Catharines, Burlington, Wychwood Barns (Toronto), Dufferin Grove, Hamilton Ottawa Street, Hamilton downtown/unspecified, Brickworks/Evergreen (Toronto), St.

Lawrence (Toronto), Leslieville (Toronto), Withrow (Toronto), Georgetown, Welland, Kitchener, Guelph, Brantford, Inglewood, Milton, and others with three or less respondents.

Household Profile

Household sizes and composition vary considerably, averaging overall 2.6 persons per household – 2.1 in Toronto and 2.8 in Central Ontario areas. Over one in three (35%) of Toronto shoppers live alone, while only 14% are single occupants outside of Toronto.

Number of persons in household	Total %	Number of adults in household	Total %
One	19	**One**	21
Two	40	**Two**	61
Three	19	**Three**	14
Four or more	24	**Four**	4
Average no. of persons - total	2.6		

Children

Almost seven in ten (69%) of market shoppers are buying for adults exclusively. Only 31% have one or more children under the age of 18. In Toronto, 77% of shoppers tend to be childless versus 65% for the Central Ontario area segment.

On average, the Central Ontario area families are larger than those in Toronto; the former group tends to have two or more children. Families with children tend to be more reliant on supermarkets, while childless shoppers buy more of their food at independents. Some of this is also a function of where they live, given that Toronto shoppers have more local and owner-operated food stores.

Base: 386	Total %		Total %
GENDER:		**OCCUPATION:**	
Female	79	Professional	42
Male	21	Manager/business owner	16
AGE GROUP:		Student	8
21-30	25	Retired	7
31-40	26	Sales/clerical	7
41-50	20	Skilled trades	4
51-60	19	Homemaker	4
61 and over	9	Other	13
Average Age:	41.5	**TOTAL NO. IN HOUSEHOLD**	
EDUCATION:		One	19
High school	12	Two	39
Some community college or university	27	Three	19
University	60	Four or more	23
HEALTH STATUS		Average No. in Household	2.6
Excellent	26	**NO. ADULTS IN HOUSEHOLD**	
Very good	50	One	21
Good	22	Two	61
Fair	2	Three or more	18
Poor	1	Average No. Adults	1.8
Born in Canada		**NO. CHILDREN IN HOUSEHOLD (UNDER 18)**	
Yes	85	None	69
No	15	One	14
		Two	14
		Three	4
		Average No. Children	0.5

NOTICE TO READER

The study provides a detailed analysis of food purchasing and consumption patterns, perceptions of farmers' markets and supermarket chains, and the impacts markets have on food preparation and eating patterns.

The analysis focuses on statistically significant differences related to demographic information and behaviour. One key factor that emerged is that there are notable differences between shoppers in the Toronto area and those who reside in Central Ontario, also labeled as Other GTA.

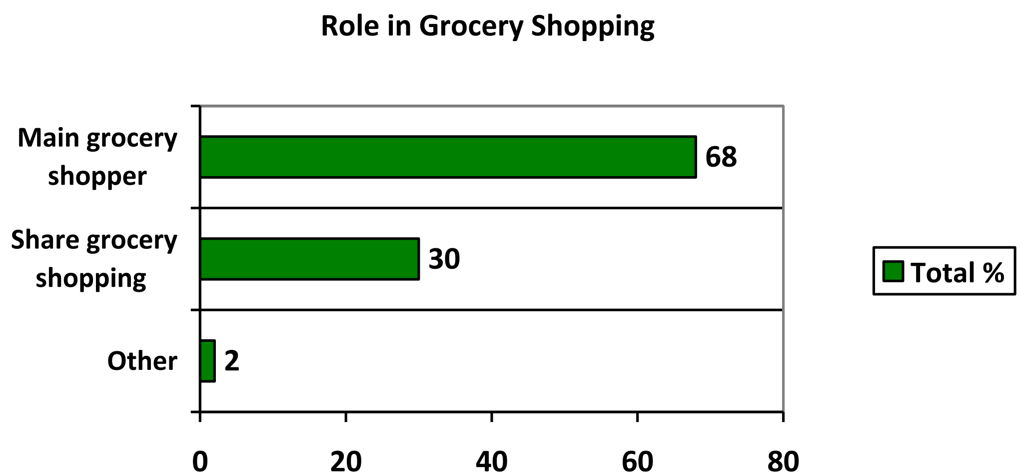
Due to rounding, percents may add up to slightly more or slightly less than 100.

DETAILED FINDINGS

Profile of Shoppers

Shopper Role

Six in ten (60%) of survey participants are the primary grocery shopper for the household, while most (38%) of the remainder share the job. Generally, women are responsible for shopping for their family, and this also applies to farmers' markets. However, food shopping is more of an 'equal opportunity' task in Central Ontario area households than in Toronto; men and those who tend to provide back-up or accompany the main shoppers are more likely to be engaged in the task and in shopping at farmers' markets.



Shopper's Health Status

Shoppers were asked to classify their health status using a measure developed by Statistics Canada. This self assessment found that market shoppers are healthier than the Canadian average. Three quarters (75%) of shoppers say they are in Excellent or Very Good health compared to 60% of Canadians. And unlike the national average, scores are virtually the same for both women and men and younger and older adults.

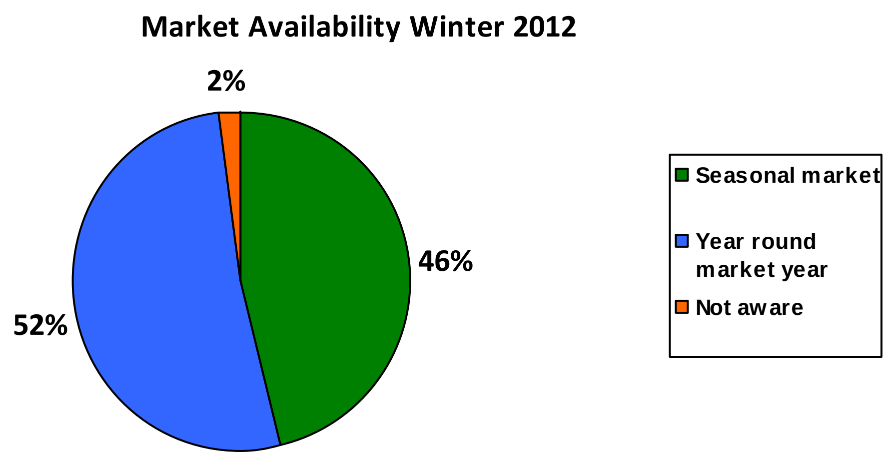
One noteworthy difference among market shoppers is related to where they live: 83% of Toronto based shoppers peg their health status as being Excellent or Very Good compared to 71% for the Central Ontario area shoppers.

Market Availability

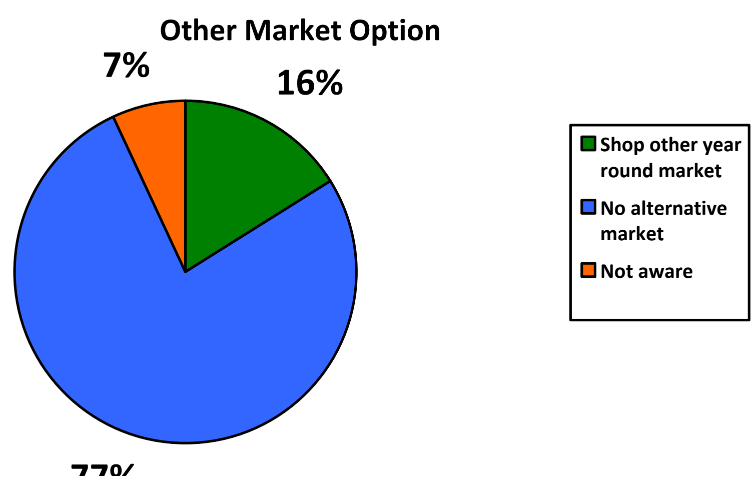
Seasonal and Year Round Markets

Six in ten (60%) of study participants are able to access a farmers' market in their community year round either at their market or at another conveniently located market. Most of the remainder (35%) report that their seasonal market closed and that they have no alternative market. The remainder (5%) was not certain about the status of their market.

Shoppers living and shopping in the GTA outside of Toronto were less able to find an alternative year-round farmers' market when their seasonal market closed in the fall of 2011.



2a.Did the farmers' market that you usually shopped at in 2011 close for the winter season?



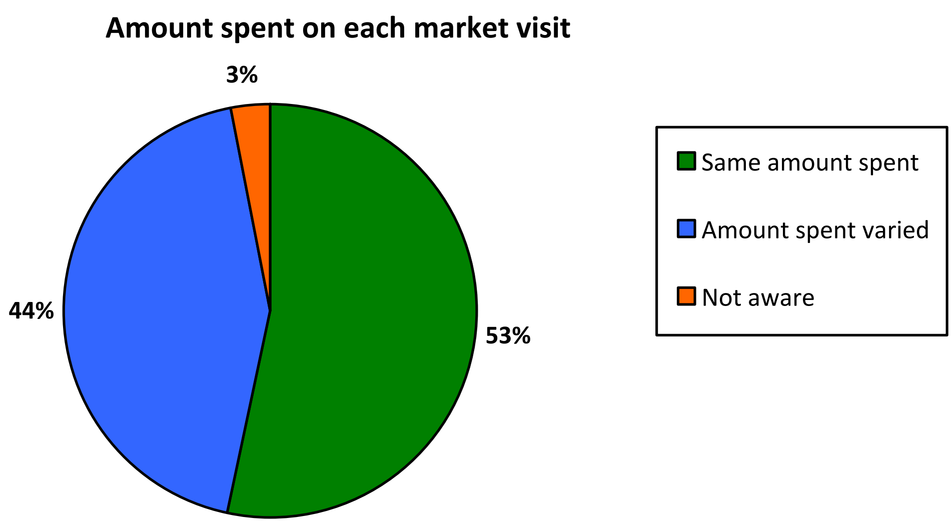
2b. Is there another year-round conveniently located farmers' market that you are now shopping at?

Expenditure at Farmers' Market

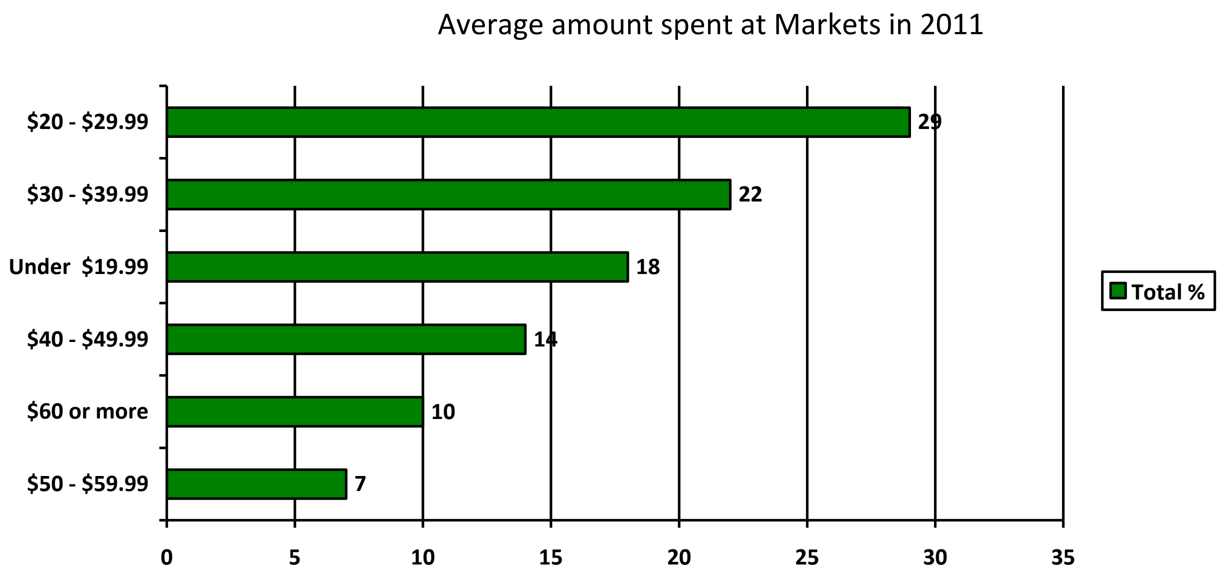
A slight majority (54%) indicated that they usually spend the same amount on each market visit, while most of the remainder (44%) claim that it fluctuates. Stable spending is more common for Toronto residents and in households without children.

On average, shoppers with stable market spending report spending $35.40 per visit – higher in Toronto at $37.80 and lower in the rest of the GTA at $32.30. This average figure includes almost half (47%) of shoppers who spend under $30, one third (36%) who spend $30 to $49.99, and 17% who spend $50 or more.

Overall, spending is quite consistent across all population segments aside from where they live. However, there is one interesting exception: shoppers who are eating seasonally (by canning/freezing supply in season and/or buying frozen local options out of season) tend to spend more on average than those who haven't adopted the seasonal eating pattern — $38.85 versus $29.10.



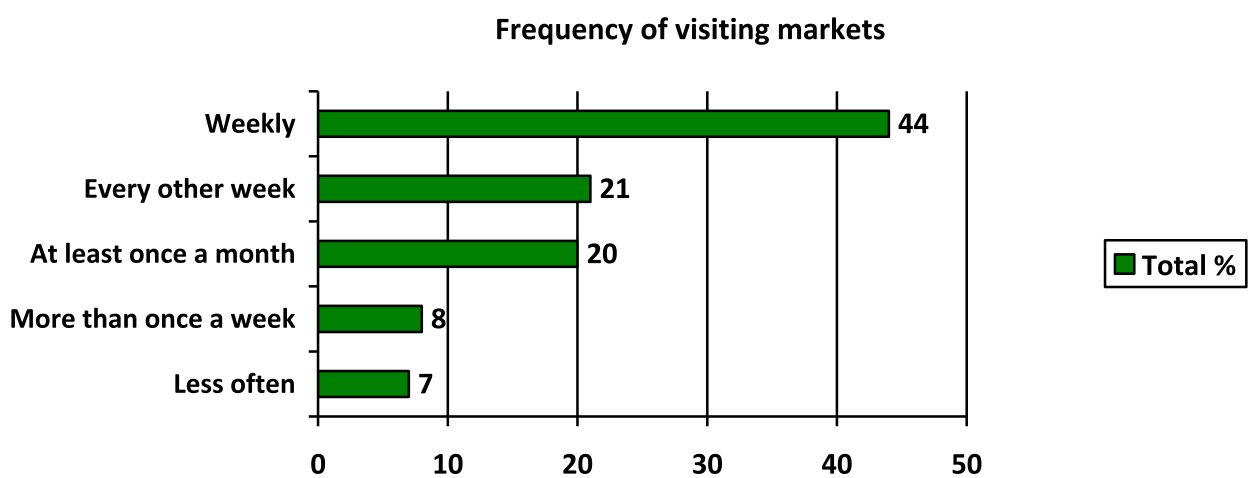
3a. Now thinking overall about the amount of money you tended to spend on each visit to a market in 2011 – which statement is more accurate?



3b. As far as you can recall, how much money did you usually spend on each visit to a market in 2011? Please select from the ranges below.

Shopping Frequency

Farmers' market shoppers are in the habit of frequent trips to the market – on average 2.9 times per month. Almost three quarters (73%) visit their local farmers' market at least every two weeks, and 52% shop there at least once a week. Only 20% say they try to get to the market at least once a month, and a few admit that they are infrequent shoppers.

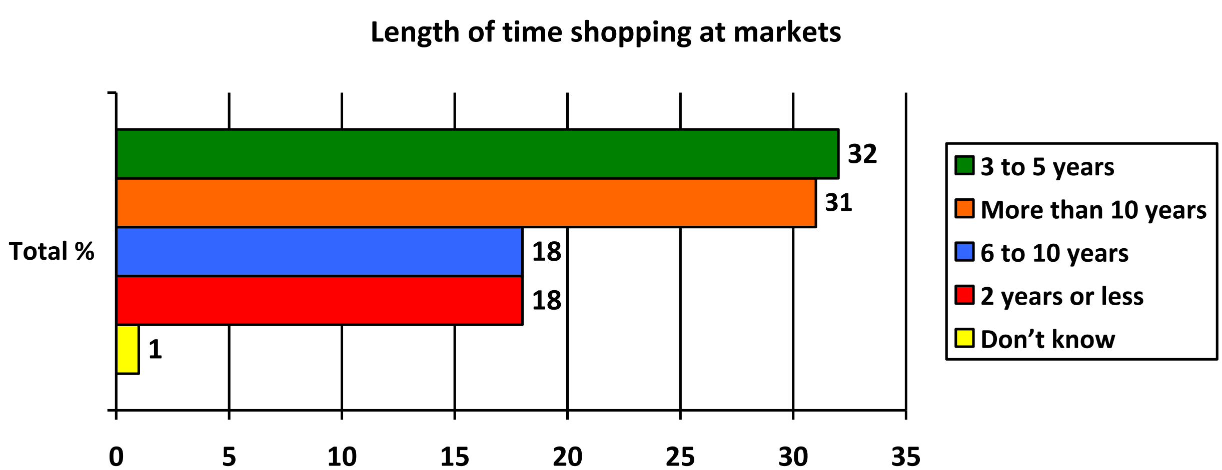


4a. Thinking back over the 2011 farmers' market season, about how often did you usually visit a market?

History of Shopping at Farmers' Markets

The number of farmers' markets in and around the Greenbelt has expanded rapidly in recent years. Now the market options include relatively new sites and those that have been long established. This combination of old and new is evident in the length of time that study participants have shopped at a market. Half of shoppers came aboard within the last five years, and the other half have been in the market habit for six or more years.

Overall, on average, shoppers have been turning to markets for local food for 7.7 years. This figure fluctuates depending on where people live; there is a longer term penetration of markets beyond Toronto. These shoppers report that they have had the market habit for an average of 8.3 years while Toronto residents have shopped for 6.4 years on average. It is noteworthy that those who are shaping their diets to eat seasonally have a longer history of shopping at farmers' markets than those who pay less attention to this factor.



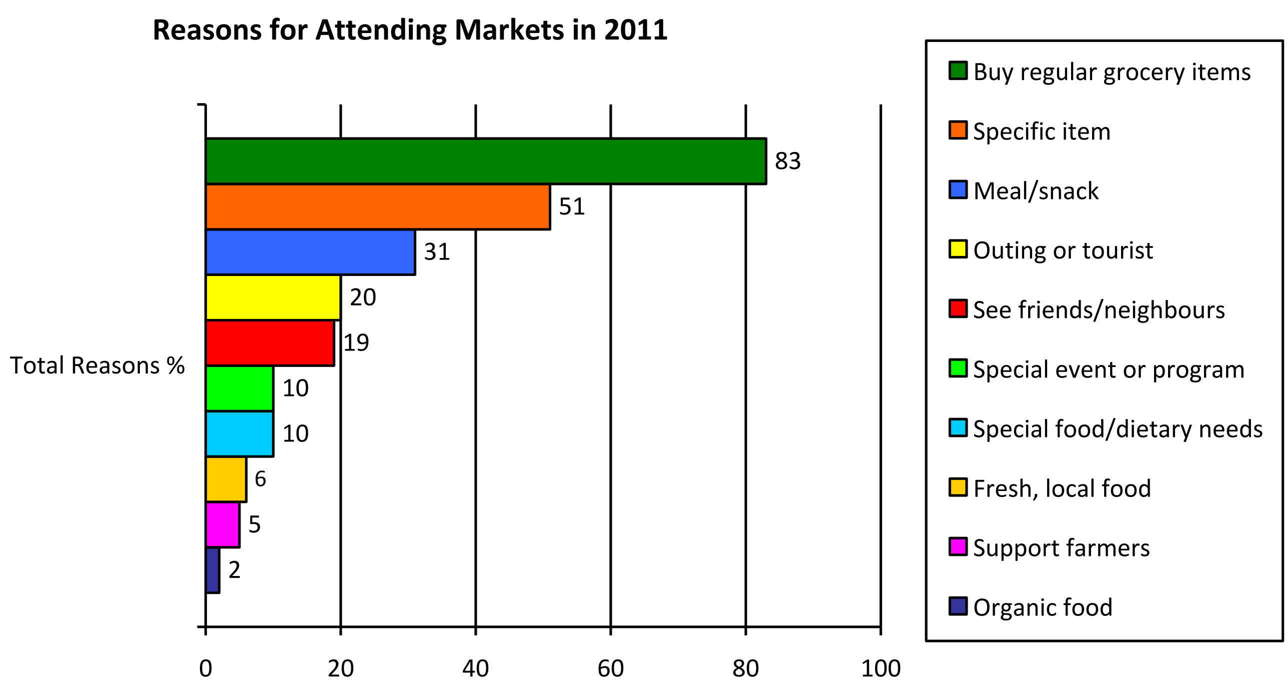
4b. About how long have you been shopping at farmers' markets?

Farmers' Markets – Reason for Visiting

Famers' markets continue to attract shoppers because they satisfy a variety of practical and social needs:

- Restocking the larder is first and foremost – over four out of five (83%) shoppers indicate that markets are about buying food for the household. Younger shoppers (under 41 years) tend to go for regular grocery items, while their older counterparts appear to seek out a more limited array of specific items.

- Markets sell very special items, often hard to access elsewhere, according to half (51%) of shoppers. In addition, a small segment (10%) finds that they can source special dietary items.
- Markets provide immediate gratification (ready to eat snacks) and home meal replacements (HMR) or prepared items ready to serve at home. One in three shoppers (31%), especially those who have children and who shop for three or more people, are more inclined to go for this category.
- The celebratory, community market atmosphere is part of the pull of markets. Four in ten (39%) list this as one of the main reasons for attending their market. The 'meet and greet' of markets is particularly strong for Toronto residents. And added to the 'invitation' to attend are the special community based events – one in ten mentioned them.



6a.Thinking back over the 2011 farmers' market season, what was your main reason for visiting?

Farmers' Market Experience – Likes and Dislikes

Likes/Strengths…

The appeal of markets is a complex array of factors starting with fresh, local, tasty, healthy food. It provides access to organic food (49% of shoppers note this) and/or non-mainstream items sought out by 37% of shoppers.

But markets are so much more than just the food. They provide a unique shopping experience, with farmers bringing local food straight to eaters – direct from 'field to table.' Shoppers know that this short supply chain benefits growers; they have the satisfaction of knowing their food dollars are going back to the people who produce the food (88% mention it). This exchange is enriched by the experience of meeting the people who produce the food (49% mention it) and, if interested, shoppers can learn about how food is grown (29% mention it).

This exchange happens in a relaxed and friendly milieu (60% mention it). It is further enriched by being anchored in the local community. The market venue is a hub for food, friends, events (art, music, nonprofit organizations, etc.) and fun.

The farmers' market totality is rich but can differ depending on where people live. Toronto shoppers are much more interested in organic food, are slightly more likely to mention that the food is healthy, are warmed by the markets' community atmosphere, and place value in learning how food is grown, whereas shoppers in Central Ontario areas are more likely to mention that the prices are reasonable – 48% versus 33% for Toronto shoppers.

5a. Now thinking overall about your experiences at markets in 2011, what did you like about shopping at farmers' markets? Please select all that apply.

	First Mention %	Total Mentions %
Fresh, local food	53	89
Support for local farmers	23	88
Quality, tasty foods	7	77
Healthy food	3	71
Friendly, relaxed atmosphere	1	60
Buy organic food	5	49
Ability to meet local farmers	3	49
Reasonably Priced	1	43
Foods I can't easily find elsewhere	1	37
NET Community - events, support, art, meet friends	2	33
Learn about how things are grown		29
Fun events	1	21
All of the above	2	2
Other	3	2
None of the above	1	1

Dislikes/Weaknesses…

Markets are not perfect and do have weaknesses, according to the majority (86%) of shoppers:

- Farmers' markets pose constraints on shoppers, particularly the limited hours, short season and infrequent scheduling. This is the single most concentrated area of criticism.
- Market food prices are an issue of concern for one third (33%) of Toronto shoppers and one quarter (25%) of shoppers in Central Ontario locations. This point stood out among those who spend less than $30 on average per visit.
- Limited array of vendors and options, which are likely tied together, leads to some dissatisfaction.

- Access to ready cash or debit machines poses a problem for a minority (20%) of shoppers, particularly those who shop at markets in Central Ontario regions.

- Parking within close proximity can be a barrier for about one in five of shoppers (18%), especially those who are shopping for larger households (three or more members) and people living beyond Toronto.

On the plus side, almost one in six (14%) had no complaints whatsoever. This opinion was most strongly expressed by older people and high frequency shoppers.

5b. And looking back, what did you dislike about shopping at farmers' markets in 2011?

	First Mention %	Total Mentions %
Limited hours	20	**44**
Short season (summer only)	17	**35**
Cost/price of food	11	**26**
Infrequent (only once a week)	5	**26**
Not enough vendors/booths	6	**25**
No ATM or debit machine	4	**20**
Parking problems/insufficient parking	8	**18**
Not enough choice	2	**15**
Hard to get to	5	**13**
Crowded/busy	1	**1**
Lack of variety/not enough specific food (organic)	1	**1**
Some poor quality/inconsistency in vendors	1	**1**
Other	1	**1**
None of the above	14	**14**

Farmers' Market Purchasing – Item and Frequency

Market managers and vendors are working hard to provide shoppers with a wide range of basic fresh, local, seasonal food staples plus complementary/ value-added items. Shoppers purchase from Individual food categories with differing frequency rates, depending on their window of freshness and serving frequency. Based on this view, here are three broad categories of items based on purchase frequency:

HIGH/ MUST HAVES:	**67 to 90% always buy** **Perishable essentials**	**Vegetables and fruit in season** **Best when super fresh**
OTHER STAPLES	**21 to 32% always buy** **More of an occasional purchase** **1 in 3 never buy**	**Eggs, bread/baking, herbs and cheese**
OTHER/EXTRAS	**19% or less always buy**	**Snacks, honey, coffee/tea, plants/ seeds, chicken, ready made meals, cut flowers, maple syrup, specialty meat, olive oil, tofu, chocolate, jams**

More detailed observations:

- Shopping selection patterns vary considerably. The main grocery shopper for the household who visits markets frequently and spends at or above the weekly average amount ($35.40) tends to shop across more categories on each visit, whereas those who share the shopping task or spend less tend to be more narrow in their range of selections. However, the one category that pulls all shoppers is fresh vegetables – almost everyone buys them on each market visit.

- Shoppers with smaller size households (one or two people) tend to be more likely to occasionally buy more of the Other Staples or Other/Extra items – herbs, specialty meat, specialty foods (olive oil, tofu, chocolate, honey, etc.). Larger households tend to concentrate on a narrow array.

- People who are adapting to eating seasonally (by canning/freezing or buying local in winter) are high frequency fresh vegetable and fruit buyers, more so than those who are not trying to adjust to eating seasonally. This former group also tends to buy a wider array of food categories on a regular rather than occasional basis. Thus the commitment to eat local and seasonally results in buying more types of market offerings.

- While some categories such as meat, chicken, eggs in particular are not on shoppers 'must buy today' list, this may be because they're not available at their market of choice.

- While crafts have limited appeal, one in four shoppers (23%) buy them occasionally; this is more prevalent among shoppers in Central Ontario locations. It should be noted however that availability of crafts is limited and some markets do not sell them.

7. Thinking back over the last year and the things you bought at farmers' markets. For each item below did you buy it Regularly, Occasionally or Never at a market in 2011?

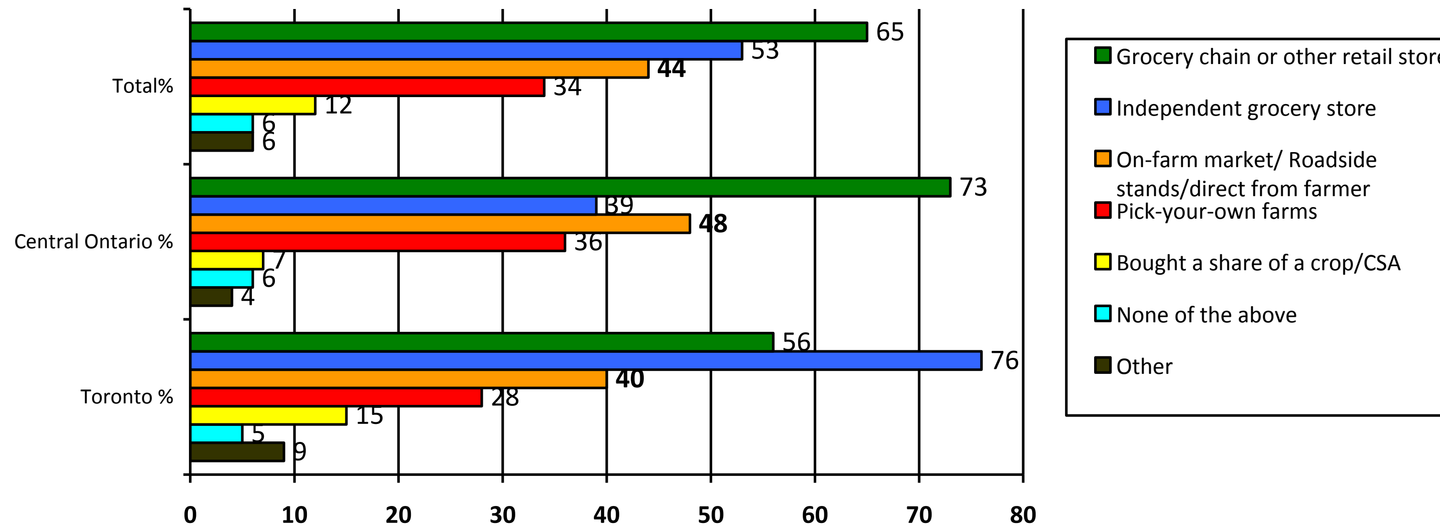
	Regularly (When In season/Available) %	Occasionally %	Never %	Can't Recall %
Vegetables	90	10	-	-
Tender fruits (: e.g.: peaches, plums)	69	26	5	-
Apples and pears	69	25	7	-
Berries (e.g.: strawberries, blueberries, blackberries)	67	29	4	-
Eggs	32	31	36	1
Bread, baking	32	50	17	1
Herbs	24	48	28	1
Cheese	22	52	26	1
Meat (e.g.: beef, lamb, pork)	21	41	38	1
Snacks/Prepared food to eat at market	19	57	22	2
Honey	19	44	37	1
Coffee or tea	16	26	57	1
Plants/seeds	11	49	38	2
Chicken	10	28	59	3
Prepared food to take home	10	47	41	2
Cut Flowers	9	44	45	2
Maple Syrup	9	43	46	2
Specialty meat (e.g.: elk, boar, goat)	7	31	59	4
Specialty foods (e.g.: Tofu, chocolate, olive oil)	7	44	46	3
Jams, Jellies, Preserves	5	48	45	2
Crafts	1	23	72	4

Other Retail Sources for Produce Purchases – 12 Month Shopping Patterns

Food sourcing options beyond farmers' markets vary depending on where market shoppers reside. Toronto and Central Ontario residents have different options for local food:

- Ever-present national supermarkets blanket the populated areas with stores in large malls and power centres and are more likely to draw in Central Ontario residents than those living in Toronto.
- Toronto residents have a rich and increasingly expanding array of food distribution channels for sourcing locally grown food, especially independent grocery stores or 'green grocers' which are ubiquitous in some parts of the City. Three in four Toronto shoppers (76%) and about half (39%) of Central Ontario shoppers go to them for their locally grown food.
- Direct from farmer, roadside stands and on-farm markets are the second most popular way for Central Ontario residents to access locally grown food. A surprising 40% of Toronto residents also mention using them.
- Pick-your-own options appeal to one in three market shoppers (34%), especially those who are preserving the harvest for winter consumption. The resurgence of this traditional practice of storing food for winter is particularly popular among shoppers with larger households, those that have children, and people under 40 years old.
- Buying a share of the crop/CSA share is becoming more prevalent for those who want to eat locally and seasonally. It is more popular with Toronto residents than those living in Central Ontario, despite living at some distance from where the food is being grown. On the other hand, Central Ontario residents are more inclined to go to on-farm locations and take advantage of U-pick opportunities.

Other Local Food Sources



5c. In the past 12 months have you bought locally grown food in other ways? See the list below and check all that apply.

Food Shopping Outlets During the 2012 Winter Months

As we learned, about six in ten study participants can access a farmers' market during the winter months even if their regular market has closed for the season. Also, most farm share/CSAs and on-farm markets are not open. This means shoppers have to turn to other retail locations to access a full range of food during less productive months.

- The relative popularity of various retail sources identified by shoppers varies based on where they live. Overall, Central Ontario residents are much more reliant on national grocery chains and to a lesser extent on small, independent specialty stores (butchers and bakeries). In addition, about one in three shoppers (31%) turn to giant discount retailers such as Wal-Mart or Costco for food supplies.

- Toronto residents, depending on where they live, can readily access a lively and growing network of small, independent grocery stores/green grocers, butcher shops, bakeries, cheese shops and culturally specific stores catering to the City's diverse population.

- A small number of Toronto shoppers (one in ten) are still staying loyal to market shopping owing to the availability of a small number of vibrant and popular year round venues, including St.Lawrence Market, Dufferin Grove Market and Evergreen's Brickworks Market.

- Food co-ops also are helping a minority (12%) of Toronto shoppers to source their food needs, and 5% are subscribing to home food delivery or food box programs.

9a. Where do you regularly shop for food now that most markets are closed for the season? Please select all that apply from the list.

	Postal Code M (Toronto) %	Postal Code L (Central Ontario) %	Total %
Grocery chain/supermarket chain	64	92	81
Independent grocery store	71	32	48
Independent butcher/meat store	42	33	35
Independent bakery	46	24	31
Wal-Mart/Costco	4	31	22
Independent cheese shop	35	12	19
Other specialty stores	15	7	10
Year round markets/farmers' markets	10	4	7
Year round CSA/farm share	8	5	6
On-farm market	1	9	6
Food co-op	12	1	4
Food box/ delivery	5	1	2
Other	1	1	1

Farmers' Market Impact on Eating

Farmers' markets practice a vision of food that focuses on local, fresh, healthy options which is in stark contrast to the mainstream food retail system. Hence, it makes sense to explore how the market model has affected shoppers and their food consumption habits. Here are the details:

Markets Reconnect Eaters with Growers – Eight in ten shoppers (81%) have been sensitized to the origin of their food. This impact is even more strongly seen among those with children, longer term shoppers (five years or more) and younger (under 40) people.

Market Food is Real – Most market shoppers (80%) are choosing to buy basic food rather than the widely available processed options. High frequency shoppers and those who are allocating more of their total food budget to market items are even more inclined to reject processed products.

Practicing 5 to 10 a Day – Farmers' markets are instrumental in reshaping diets as three in four shoppers claim that they are now eating both more servings of fresh fruit and vegetables and a wider variety of them. Market exposure to fresh, local produce is pivotal in reshaping eating patterns.

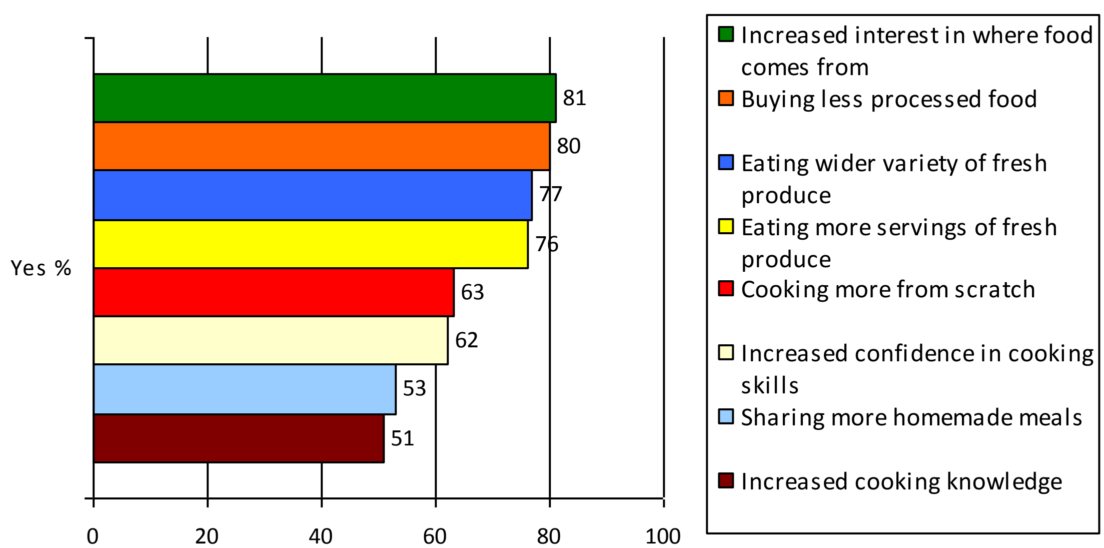
Markets Inspire Action…in the kitchen. Shoppers become involved with the food preparation process when they buy fresh market food. Buying these ingredients is the first step in cooking 'from scratch', according to almost two in three shoppers (63%). There is a direct, positive correlation between the incidence of making homemade items and the frequency of shopping and amount of money spent at markets.

Positive Feedback Loops – The ability to make healthy, tasty food increases with practice. At least six in ten (62%) of shoppers say that their confidence in the kitchen is increasing.

Sharing the Abundance – Half (53%) of shoppers report that they are now sharing more meals with friends and loved ones. This pattern is particularly prevalent among younger shoppers (under 40).

Markets Join the Food Network…and the dense array of 'go-to' places for tips on food storage and preparation. Half (51%) of shoppers say that they are learning about cooking at markets. This benefit is particularly notable among younger shoppers and those who visit Toronto markets.

Impact of Markets on cooking, recipes and sharing

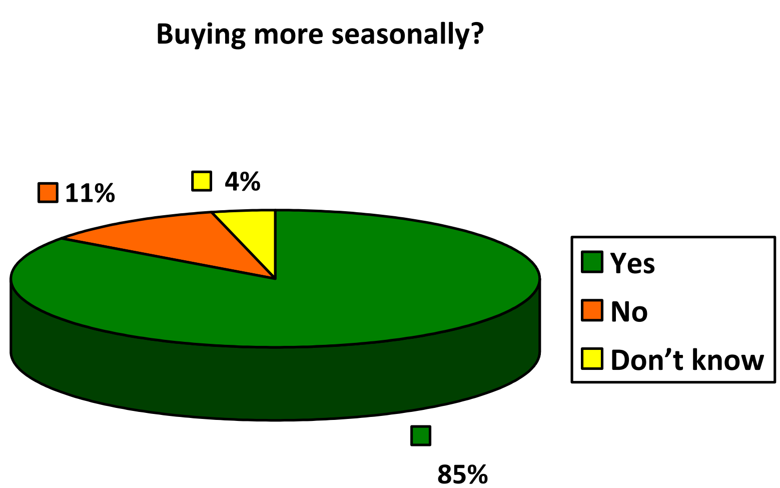


8. As far as you can tell, has shopping at farmers' markets resulted in any ongoing changes? For each item below please indicate if as a result of shopping at farmers markets you are…

Eating Seasonally

Farmers' markets provide a strong lesson on what is and is not available both seasonally and locally in contrast to the supermarket norm of 'always in, always available'. Market shoppers learn that produce is seasonal and that the length of season can be quite short for some items such as beloved strawberries and asparagus and longer for others including onions and sweet potatoes. Eating seasonally presents a whole new model which has had considerable impact on people who choose to buy some of their food at farmers' markets.

- The majority (85%) of shoppers claim that they are now trying to follow the seasons when they buy produce.
- The practice of eating seasonally is even more prevalent among those who claim that their health status is Excellent/Very Good and those who are extending the season by preserving, canning or freezing crops when they are at their peak.
- Toronto market shoppers are more likely to eat more with the natural growing cycle than those from the Central Ontario area.



10c. Do you find that as a result of shopping at farmers' markets, you are trying to buy more seasonally?

Eating seasonally means shifting purchasing, preparation and cooking habits. It is a departure from the mainstream norm that assumes that all fresh ingredients are available year round. While some market shoppers are trying to adapt to the seasons in some ways, a majority (59%) indicate that they are accustomed to getting what they want, when they want it regardless of the season. This is particularly prevalent in households with children and those with three or more people to feed. Central Ontario shoppers are more inclined to follow the conventional year-round supply model than those from Toronto, which could be linked to their strong off season reliance on supermarket chains and discount retailers.

Here are the adjustments that some market shoppers are making to eat more locally and seasonally:

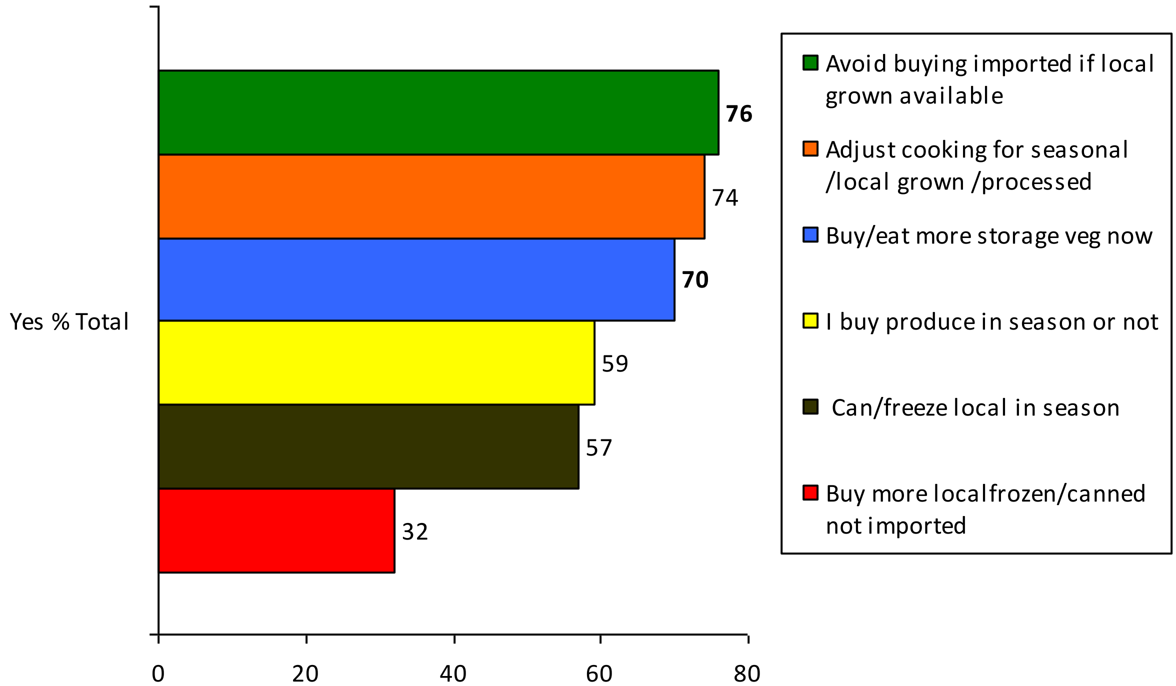
High Frequency Patterns 70% or More

- Buying locally grown when it is available avoiding imported
- Alter cooking/recipe to eat seasonal or local processed
- Buy/use more local, ‘storage’ vegetables

Lower Frequency Patterns - 32% To 57%

- Preserve or freeze local food when it is in season.
- Buy locally grown frozen or canned seasonal not imported fresh ones.

Seasonal Adaptation in the Winter



10d. Here is a list of different ways of eating seasonally in winter. For each please indicate Yes I Do This, No I Don't Do This or Don't Know

COMPARING FARMERS' MARKETS AND SUPERMARKETS

Farmers' markets have played a major role in connecting producers with eaters. Eaters come to markets for food and in the process become part of a new way of selecting and perceiving food. The markets anchor them in local food – its appearance, taste, seasonal availability, true value and origin.

Comparison on Produce Availability and Quality

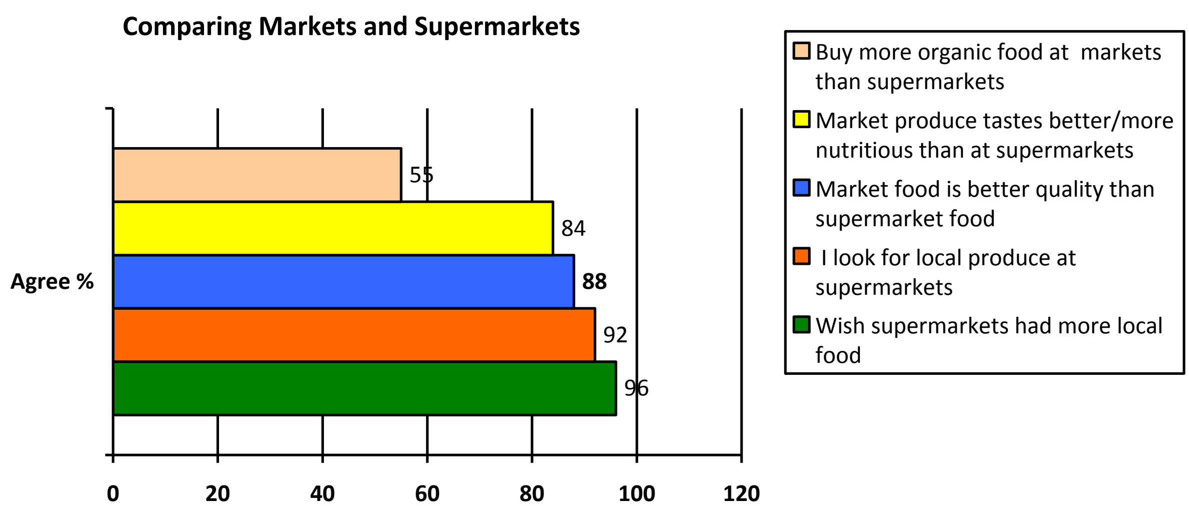
Shoppers Want Local – There is near universal demand (96%) for locally grown at all retail outlets. Supermarkets are not providing shoppers with local options despite the demand.

Shoppers Will Buy Local – They prefer to buy seasonal and local rather than imported if available. The proviso is that the local option should deliver quality and fair value; a large price difference will prompt budget-constrained shoppers to buy the cheapest.

Shoppers Link Local with Quality – Most market shoppers (88%) agreed that produce from markets is superior in quality to the equivalent available in supermarkets.

Shoppers Link Quality with Taste and Nutritious Value – Market produce not only looks good but delivers taste, and by inference is seen to be more nutritiously beneficial according to most shoppers (84%).

Markets Leads to More Organic Sales – Over half (55%) of shoppers agree that they buy more organic food from markets than from supermarkets. This pattern was even more prevalent among younger people and those living in Toronto.



9b. Here is a list of statements about shopping at grocery stores and shopping at farmers' markets. For each do you Agree or Disagree?

Comparing Produce

Again, the study explored produce sold at markets and supermarkets: How did these two different supply sources vary on a number of factors – better, the same or not as good?

Two thirds or more of shoppers find that produce sold at markets is, listed in order of significance:

- Contributing to the local economy – money spent at markets stays in the community.
- Fresher, delivers better overall quality, tastes better and is visually more appealing. This net impact is that market produce is perceived to be more healthy and nutritious.
- More 'environmentally friendly', likely attributable to the widely held perception that even conventional local growers use fewer pesticides than imported options, regardless of country of origin.
- Somewhat weaker on 'good value for money'. Half (53%) of shoppers agree that markets are superior, while one in three (32%) think markets are equivalent to supermarkets. Only one in ten (12%) find that markets are not as good in delivering value for money spent. It must be noted that all shoppers, regardless of where they are living in and around the GTA, agree on this value proposition.

11b. Here is a list of factors for comparing fresh produce you buy at farmers' markets and fresh produce you buy at supermarkets. Do you think that the produce you buy at the market/markets is Better, The same or Not as good as in terms of … than what you buy at supermarkets? Please provide an answer for each below:

Comparing produce at farmers' markets & supermarkets	Better %	The same %	Not as good as %	Don't Know %
Keeping more money in the local economy	94	4	2	1
Freshness	92	6	2	-
Overall quality	89	9	1	1
Taste/Flavour	88	11	1	-
Environmental friendliness	88	6	1	4
Health/Nutrition	75	22	1	3
Visual appeal	68	23	8	2
Good value for money	53	32	12	3
Long lasting/keeping well in my fridge	44	39	12	4

INFORMA

Comparison on Other Factors

Shoppers see farmers' markets as being superior to supermarkets in terms of economic, environmental, social and educational impacts, and perceive supermarkets as either equivalent to or outperforming markets only in the areas of prices and availability of convenience/ready to serve food.

Economic Benefits — Most shoppers (94%) believe that markets are better for the local economy than supermarkets because of the direct exchange between growers and eaters: shoppers know where their money is going. Tied to this, shoppers appreciate that they are supporting local farmers – nine out of ten (92%) conclude that this exchange contributes to a sustainable food system.

Environmental Benefits – Shoppers agree (88%) that markets are more environmentally friendly than supermarkets. Further in the report are findings related to food waste and packaging.

Eating Benefits – Three in four shoppers (78%) find markets inspire and model healthy eating. Only a minority (19%) find that supermarkets function in this way.

Educational Benefits – Three in four shoppers (76%) find that they learn about food production at markets. Few (15%) experience this benefit from supermarkets. Also, despite the efforts of some supermarket chains to inspire shoppers to try new recipes, markets are far superior in this regard. Markets outperform supermarkets when it comes to teaching people how to use new ingredients.

Social Benefits – Shoppers experience a friendly atmosphere at markets that is absent at supermarkets according to most respondents (83%). Markets provide a venue for shoppers to meet friends and interact with their community (two thirds find this is unparalleled in supermarkets). And more than half (56%) find that markets welcome diversity while supermarkets can be socially stratified.

Pricing/Value Comparison – Overall, market shoppers are divided on this issue. One in four (24%) say that markets are better, and about an equal number (28%) find that markets are not as good as supermarkets in 'providing prices that I can afford'. Most of the remainder (45%) find that prices at markets and supermarkets are the same.

It is noteworthy that significant differences on 'prices that I can afford' exist between Toronto residents and shoppers in Central Ontario locations. Toronto shoppers were more critical of market prices – almost half (46%) find that prices do not match those at supermarkets. In comparison, Central Ontario area shoppers were much more likely to find market prices were either better than supermarket prices or on par. This price disparity related to location begs investigation.

Convenience Food Advantage – Supermarkets are far superior in delivering convenient, ready to serve food than markets according to half (53%) of shoppers. This is the only measure where markets are bested by supermarkets.

Comparing Farmers’ markets & supermarket shopping	Better %	The same %	Not as Good %	Don’t Know %
Being good for the local economy	94	4	1	2
Helping me understand the importance of supporting local farmers	92	5	-	3
Environmentally friendly way of getting our food	88	6	-	6
A friendly, relaxed atmosphere	83	14	1	2
Encouraging healthy eating	78	19	-	3
Providing facts about how our food is produced	76	15	2	8
A place to meet the community/friends	67	22	1	10
Inspiring me to prepare new things	65	26	3	6
Providing facts on how to store produce	56	28	4	12
Welcoming all kinds of people/everyone	56	36	3	5
Providing facts on how to prepare new items	50	30	9	11
Prices that I can afford	24	45	28	3
A good selection of ready to serve convenience foods	19	17	53	11

11a. In comparing shopping at farmers’ markets and shopping at supermarkets, are farmers’ markets Better, The same or Not as Good as supermarkets in terms of ….. Please provide an answer for each item below.

Market Impact on Food Preparation and Consumption

Food Experimentation – Markets are much more likely to stimulate purchase and preparation of new ingredients than supermarkets. Seven in ten (71%) agree that the friendly, information-sharing market atmosphere leads to new cooking adventures. Markets inspire many shoppers (69%) to try out new recipes and to work with new ingredients.

Healthier Meals – Given that most market shoppers believe that the produce is far superior to that sold in supermarkets, most (70%) believe that consequently they are eating healthier meals.

Combining Shopping and Education – Markets go beyond basic economic exchange by providing more education about eating healthy than do supermarket environments, according to two thirds (67%) of shoppers. This makes sense given that markets sell simple ingredients and healthy food, while supermarkets predominantly stock processed, packaged, branded items.

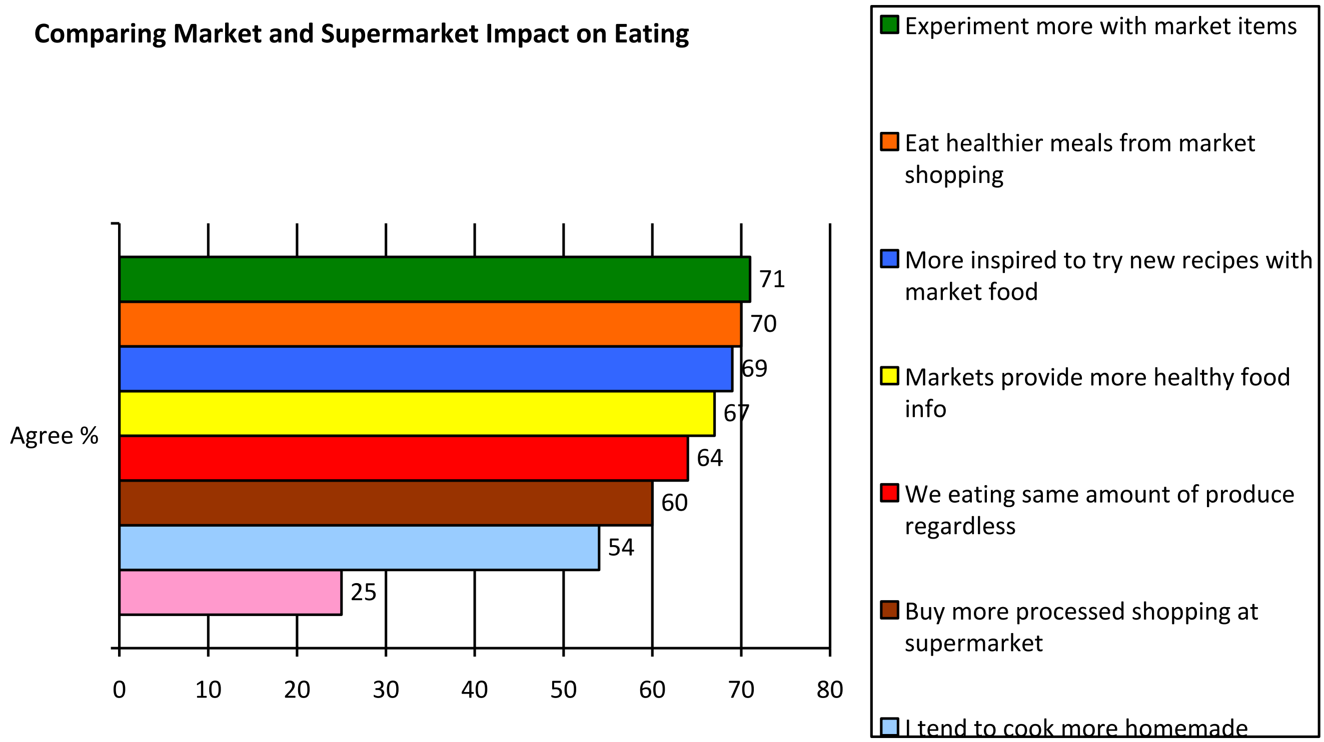
Source Unrelated to Produce Consumption – Almost two thirds (64%) of shoppers claim that their family/household eats the same amount of fresh fruit and vegetables regardless of where they shop. Only one in four (23%) disagree with this proposition.

Supermarkets and Processed Food – Six in ten (60%) agree that they buy more processed and potentially less healthy food when they shop at supermarkets. Only one in four (28%) disagree that this is the case.

More Homemade Meals – Home cooking is an outcome of market shopping according to half (54%) of shoppers. Given that markets mainly sell fresh, raw ingredients, this means that these households do more 'cooking from scratch'.

Shared Meals – One in four (25%) report that market shopping and the cooking that ensues means that household members make the time to sit down to eat together. This incidence increases among high frequency and high spending shoppers.

	Strongly & Somewhat Agree %	Neither Agree Nor Disagree %	Somewhat & Strongly Disagree %
I think that I experiment more with new things when I shop at farmers' markets.	71	18	11
Overall, I eat healthier meals when I am shopping at farmers' markets compared to shopping at supermarkets.	70	21	9
When I shop at farmers' markets I am more inspired to try cooking/making new things than when I am shopping at grocery stores.	69	20	11
Overall, farmers' markets provide me with more education about healthy eating than the supermarkets I shop at.	67	26	7
Our family/household is eating the same amount of fresh fruit and vegetables no matter where I/ we shop.	64	13	23
I tend to buy more processed and ready-made items that may not be as healthy when I am shopping at the supermarket.	60	12	28
I tend to cook more homemade meals when I shop at farmers' markets than when I am shopping at supermarkets.	54	25	21
Our family eats more meals together when I shop at farmers' markets.	25	50	25



11c. Here are a list of statements that shoppers have made about farmers' markets. For each would you please indicate: Strongly Agree, Somewhat Agree, Somewhat Disagree, Strongly Disagree

In the Words of Shoppers…the Impact on Eating and Cooking

Over half (57%) of participants took the opportunity to describe the impacts that markets have had on their eating and cooking habits.

- Shoppers are Eating Better (22%) – This includes taking positive actions such as eating healthier meals and turning towards more fresh and seasonal produce. It also results in consuming less 'empty' calories. Plus, a small number of shoppers observed that market meat looks better. As one shopper described it, supermarket food "seems sub-par". People who spend more on average at markets are most likely to note that their diet has improved.

- Improved Shopping and Cooking Habits (14%) – The market experience has sensitized some shoppers to new behaviour patterns: eating more produce, preserving the harvest, cooking from scratch, menu planning and better quality meals.

- 12% notes they're learning about local food and the merits of choosing it. They are now more connected with local seasonal availability and the range of local food that is available, which suggests that import replacement is occurring.

- Shoppers who are turning to local farmers for more of their food have come to appreciate the benefits of having a local, sustainable agricultural sector that deserves to be supported.

- Markets are positive contributors to quality of life. They not only benefit shoppers and their community, but they have a positive impact on the planet – act locally, think globally.
- Shoppers prize markets as an enjoyable experience where they can interact with farmers/ friendly vendors and others. A small number mentioned that it has inspired them to start a garden.
- A handful of shoppers registered complaints about “fake farmers”, limited variety and expensive prices.

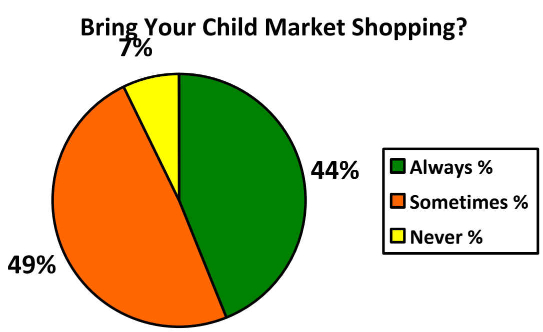
11d. Is there anything you would like to add about the impacts, if any, shopping at farmers’ markets has had on your eating and cooking habits?

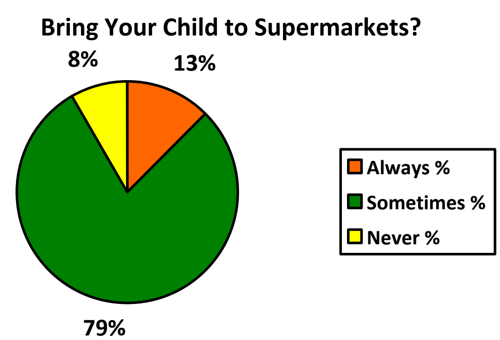
Impacts Markets have had on eating/cooking habits:	**Total %**
NET: Eating Better – eating healthier meals, eating fresh produce, eating foods that are in season , eat less sweets, meats look/are better, good quality food/supermarkets seem sub-par	**22**
NET: Change in Cooking/Shopping Habits – eat more specific things (vegetables, fruit, eggs), do more preserving, cooking from scratch , prepare new meals, other positive shopping habits, better meal planning	**14**
NET: Awareness/Education – buy/eat more local food, more aware of local food availability, became more educated about food, know where food comes from, educate my children	**12**
Supporting farmers/local economy/appreciating farmers	**8**
Positive market feelings (grateful, community feeling, benefits entire family, positive quality of life, helping the planet, etc.)	**6**
NET: Farmers’ Market Experience – good experience/enjoyable day, like interacting with farmers, friendly vendors	**5**
Positive result of Farmers’ Market experience (started own garden, structure week around market trip, share stories, exchange recipes, etc.)	**5**
NET: Enjoyment/taste, food tastes better/adding less so food tastes better, eating more enjoyable	**5**
NET: Selection – find specific food types (organic, free range, ethnic special needs, allergies) better selection/more produce	**4**
NET: Negative mentions (ban fake farmers, need more variety, need to advertise more) sometimes too expensive	**3**
Other positive	**4**

Impact on Children and Eating

Questions were included to capture information about the impact of farmers' markets on children. Only 31% of survey participants had one or more children living at home under the age of 18. The incidence of children was higher in Central Ontario communities than among those living in Toronto – 35% versus 23%.

- Overall, shoppers with children were much more likely to 'always' take them along for the market experience than for a trip to the supermarket. Only 12% always brought their child/children to the grocery store – this incidence is much lower in Toronto (6%) compared to 14% in Central Ontario households.
- Parent shoppers are more likely to bring their children along to the grocery store on occasion – 76% do 'sometimes' whereas this pattern is much lower for markets.



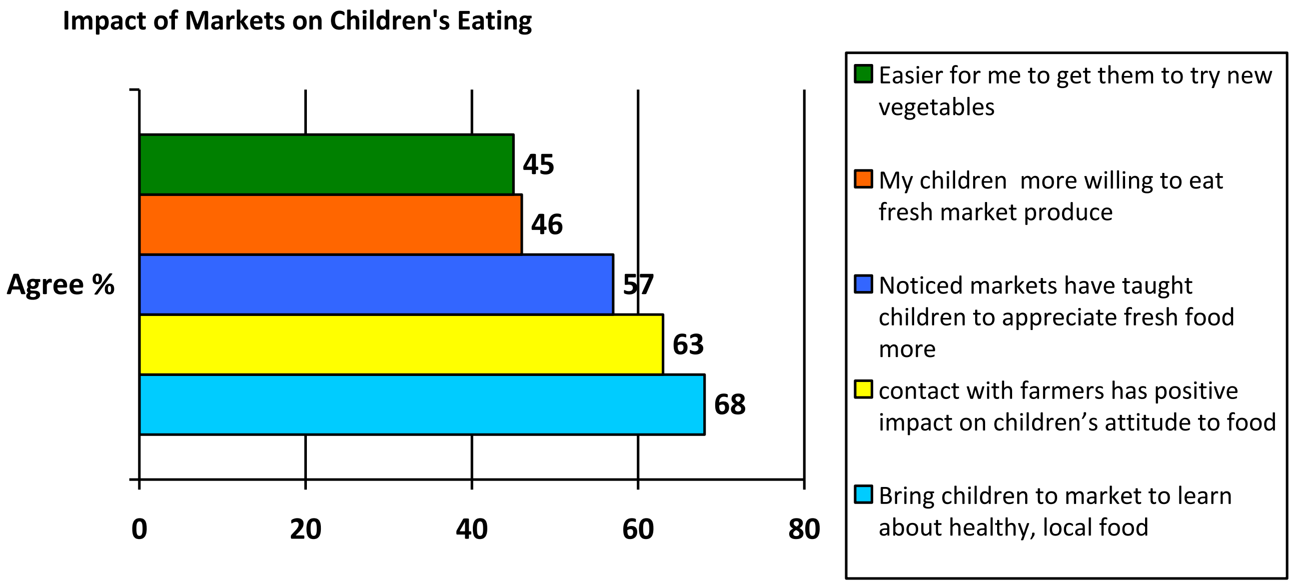


12a.Do you tend to take your child/children when you shop at...? Please answer below:

Parents are more likely to bring their children to the market than a supermarket because it is a different type of food exposure experience, as follows:

- Two thirds (68%) of parents are motivated to bring their children to the market because they believe that markets are a learning environment. They want their children to be exposed to healthy, local food.
- Over six in ten parents (63%) report that the contact with growers has helped shape positive attitudes towards healthy, locally grown food. The interaction has significance.
- Many parents (57%) believe that this experience has resulted in children having more appreciation for healthy food.

- About half (46%) of parents report that this exposure had has positive outcomes resulting in their children eating more fresh produce from the market. It also means that children are more willing to try new food items in half of cases.



12b. Here are some statements parents have made about shopping at farmers' markets. For each do you Agree, Disagree or Don't know

FOOD WASTE

Food waste, much of it still eatable, is a major component of household solid waste. What impact, if any, does shopping at farmers' markets have on the volume of good food that is being thrown in the garbage?

Overall, shopping at farmers' markets can have a positive impact on reducing food waste for several reasons. The very strong positive feelings about the quality and integrity of this locally grown, source identified food means that shoppers try really hard to use it all up. Plus, freshly harvested market produce can mean that it has a longer lifespan, depending on how perishable the item is.

Vendors can play a role in reducing food waste by allowing shoppers to buy only what they need. This is particularly helpful for those who live alone or have few household members.

Surprisingly, buying ready to eat, processed food does not reduce food waste. However, some shoppers find that markets can make a difference by providing tips on how to store and prepare foods.

Most shoppers claim they are aware of the amount of food they waste, contrary to data from municipal waste composition studies. However, some shoppers do admit they waste money and food when they buy bargain supermarket produce.

Less Packaging Waste – Most shoppers (92%) agreed that market shopping results in less packaging waste, given that market items tend to have as little packaging as possible.

Buy the Amount you Need – Many (83%) find that food waste is reduced if vendors permit them to purchase only the volume that they require. Female shoppers were more likely to agree than men.

High Value Leads to Less Waste – Given the strong positive perceptions about the quality and nutritional merit of fresh market food, almost three in four (72%) agree that they try harder to consume it rather than throw it away.

Fresher Mean Less Waste – Over six in ten (63%) believe that the extra freshness of market produce results in less waste. Just-picked produce can mean that it lasts longer than imported produce. Interestingly there is a significant difference between Toronto and Central Ontario shoppers on this issue. The latter segment is much more likely to notice the extra freshness of market food, possibly a function of their higher reliance on supermarkets for produce than Toronto shoppers who have a wider array of food retail options.

Buy More Waste More – Shoppers are split on the issue of food waste and supermarket bargain produce. Four in ten (39%) agree that low prices can lead to overbuying and result in food waste, while 45% disagree that this happens.

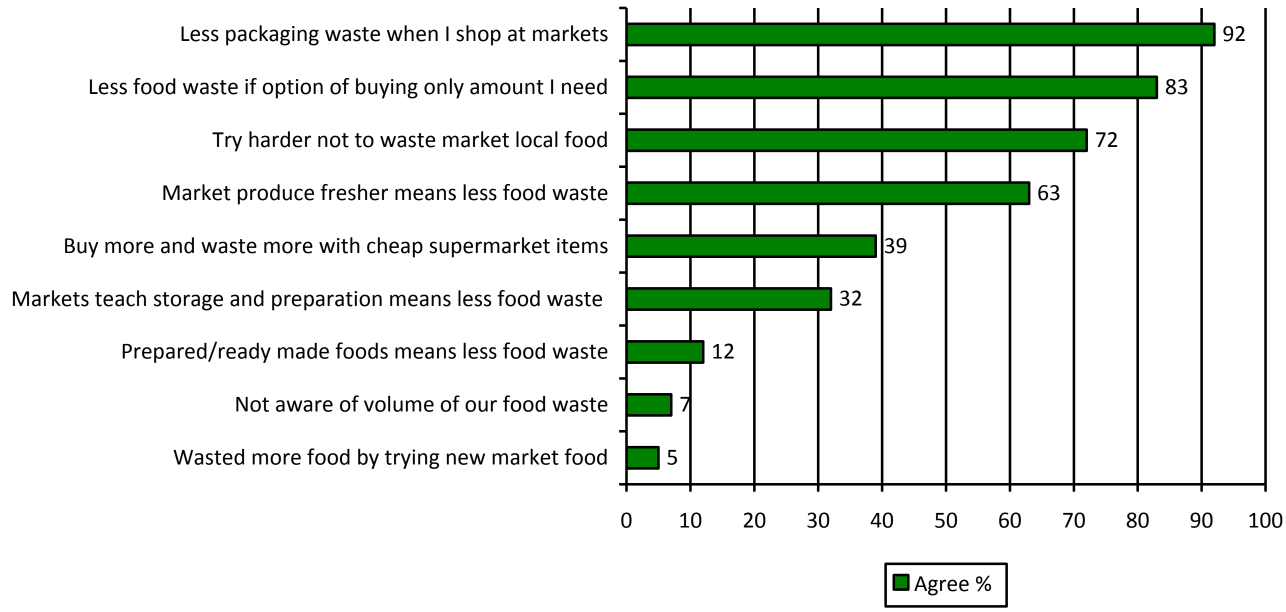
Market Learning Means Less Waste – Again, shoppers were somewhat divided on this issue. One in three shoppers (32%) agree that learning about cooking and storage at the market means less waste, while 39% disagreed. A large minority (28%) were unable to answer this question.

Prepared Food Doesn't Mean Less Waste – Most shoppers (71%) find that there is food waste when they buy prepared food. This is not a way to reduce the amount of eatable food that is being thrown out.

High Awareness of Food Waste – Very few shoppers (only 7%) say that they are unaware of the amount of food waste that their household is generating.

Experimenting is Efficient – Most shoppers (84%) rejected the notion that market-inspired new cooking ventures lead to more wasted food. Only 5% found that this was the case in their household.

Impact of Markets on Food Waste



	Agree %	Disagree %	Don't Know %
I think that I have less packaging waste when I shop at farmers' markets.	92	6	2
I have less food waste when vendors give me the option of buying only as much as I need.	83	9	8
I think that buying locally grown food at farmers' markets means that we try harder not to waste it.	72	20	8
I find that there is less food waste with produce that I buy at farmers' markets because it is fresher.	63	25	12
I find that I buy more and waste more with bargain supermarket items.	39	45	16
I think that there is less food waste with things from the farmers' markets because they teach how to store and prepare it.	32	39	28
I think there is less food waste when I buy prepared/ready made foods.	12	71	17
Generally, I am not really aware of how much food goes into the garbage at my house.	7	91	2
I think we wasted more food when I tried new things out from farmers' markets.	5	84	11

Looking ahead to Farmers' Markets in Spring 2012

Shopping Intentions

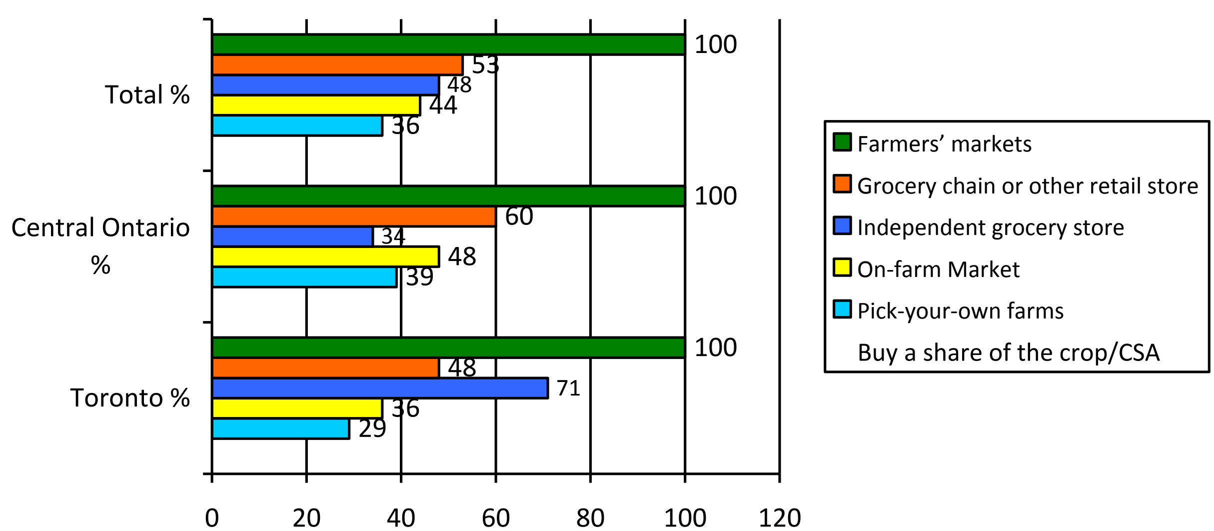
All of the study participants indicated that they would return or continue to make farmers' markets one of their sources of locally grown food in spring 2012. Clearly only those committed to shopping at markets chose to participate in this study.

The question was broad, asking shoppers where they would buy locally grown food when it is available this spring-summer. In addition to farmers' markets, shoppers will source from grocery stores and independents. When they open for the season, shoppers will return to on-farm markets and pick your own operations, and a minority (15%) will invest in a share of the crop.

As noted previously, other preferred sources vary depending largely on their accessibility. Central Ontario shoppers' patterns differ from Toronto residents, with a heavier reliance on national grocery chains. On the other hand, Toronto residents have a stronger propensity to purchase local food from independent retailers/green grocers; supermarkets are less popular.

While direct at the farm, on-farm markets and pick your own are a secondary source, they will continue to attract more Central Ontario shoppers than those living in the City of Toronto. A surprising 21% of Toronto market shoppers are planning to buy a share of the crop – 10% for Central Ontario residents.

2012 Season shopping intentions



14a. Looking ahead to spring-summer 2012 where do you think you will buy locally grown food? Please *check all that apply*.

Comparing Past, Current Habits and Future Shopping Intentions

For comparison purposes, the table below summarizes where market shoppers sourced/will source locally grown food at three different points: winter 2011-12, market season 2011, and spring/summer 2012. It reveals a consistent pattern:

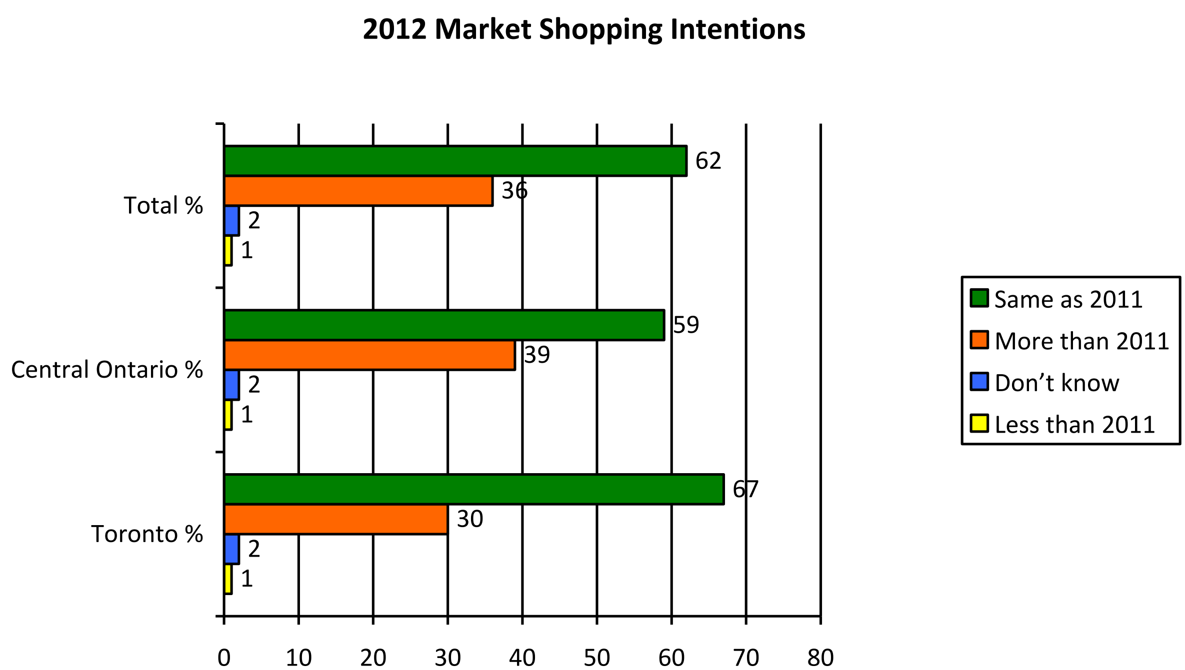
- National chain share of sales for locally grown food ebbs and flows depending on the season. It peaks during the winter when many markets are closed and the range of offerings is low but during the local growing season a significant share of shoppers turn to other types of outlets. Sales pick up at independent grocery stores, on-farm markets and pick your own.
- Clearly market shoppers migrate depending on the season – local, independently owned and farm related operations gain at the expense of the supermarket chains.

Comparing Shopping Non Farmers' Markets Sources for Local Food: Winter 2011-12, Market Season 2011 and Intentions for 2012 Season	TOTAL Winter Season %	TOTAL Other Past/2011 %	Total 2012 Intentions %
Grocery chain or other retail store	81	65	53
Independent grocery store	48	53	48
On-farm Market	6	44	44
Pick-your-own farms	-	34	36
Buy a share of the crop/CSA	6	12	15
Other – grow our own, Food box/ FoodShare/delivery service, Share with family/friends/neighbours, food co-op	7	6	N/A
Specialty stores (butcher/meat store, bakery, cheese shop, other specialty)	95	N/A	N/A

Frequency Intentions for 2012

Intended market shopping frequency indicates that one in three shoppers have an even stronger commitment to buy fresh, local food at their local farmers' market, even more so in Central Ontario than in Toronto.

This commitment is particularly strong among those who manage to go to their local market every other week, those who were more recently introduced to the market shopping experience, and younger shoppers (under 41 years).



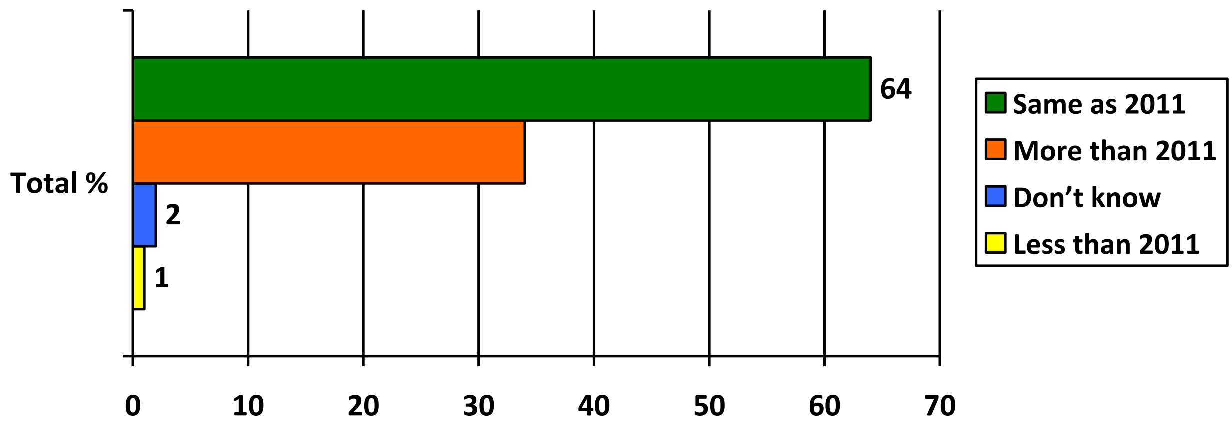
14b. Thinking about buying food at farmers' markets, how often do you think you will shop at farmers' markets:

Spending Intentions for 2012

About two thirds (64%) of market shoppers predict that they will spend about the same amount of their food budget this year as they did last year. Their circumstances have not changed – the household size and food budget are the same as they were last year.

An encouraging one in three shoppers guesstimate that they will likely direct more of their food dollars to markets, either because they want to support the local economy, they're opting more for organic food, or their circumstances have changed, such as the family size is shrinking or expanding. A minority noted that this yen for fresh local is a result of learning and adjusting their eating patterns in a positive direction.

2012 Market Spending Intentions



14c. Looking ahead to the amount of your food shopping budget you are likely to spend at farmers' markets in 2012, which of the following is most accurate:

Reasons for intention to spend more at markets:	**Total %**
NET: Plan to attend more/spend more/situational changes/use grocery store less	50
NET: Buying local, support the local economy, locally grown food, local organic	23
NET: Closer, easier to get to, moved closer	13
Better education/learned more/more knowledgeable	12
Eating better/healthier diet/more non-processed foods	8
Price increases/rising costs/more expensive	5
Enjoy it, love it	3
Fresher food, fresher longer	2
NET: Qualifying Answers – if it had longer hours, if more markets, if closer	2
Other: for buying special items, convenience, use what I grow	8
NET: No change in situation, go there regularly	2
Don't know	5

Reasons for intention to spend the same	Total %
NET: No Change In Situation - go there regularly already, needs are the same	40
NET: No Change In Money - have a food budget, same income, only buy what I eat	28
Only buy what I can eat/before next market day	9
NET: Qualifying Answers – If more markets, better selection and only if prices stay the same	7
Habit/routine	6
Have less/limited money/can't afford more/tighter budget	4
Fresher food/fresher longer	2
For buying specific items	2
NET Buying local/locally grown produce/support local economy	2
Other including: convenience, price increases, enjoy it/love it, eating better/healthier diet, use what I grown myself, learned more	13
Don't know	11

Making Markets Even Better

Most of the study participants weighed in with one or more suggestions for improving markets And they commented on a wide range of variables: operational issues, vendor origin and type, product choices, outreach/market promotion and prices.

- One quarter (24%) of shoppers would love to have increased access made possible by altering market scheduling: more/longer hours, more days/evenings, year-round etc. This plea crossed all demographic categories but was stronger among those shopping for adult only households.

- One in five (21%) focused comments on vendors including increasing the number at their markets (more specialties) and concerns/complaints about authenticity. They shop at markets to source local food direct from growers; vendors who are not growers and/or who accessing supply from the Ontario Food Terminal should be identified. Shoppers want to be assured that the food they are buying is locally grown. This concern was most strongly expressed by higher spending shoppers.

- One in six (16%) look forward to finding a wider array of local food at their farmers' market. This included a broad desire for more choice and specific references such as ethnic food, dairy, meat, homemade items, baked goods, organic food, preserves, etc. This call was particularly strong among households with children and three or more members. Clearly, they would like to source more of their buying needs from the market.

- Market shoppers would like awareness to spread; they vote for local with their food dollars and believe that others should too. It is a matter of education through promoting the markets and expanding awareness about the importance of buying local.

- One in ten shoppers (10%) focused on market prices as a limiting factor. They would like to see reduced prices that would make market items competitive and more affordable. This factor was particularly prevalent among people shopping for larger households and lower frequency shoppers.

- Other factors that could be changed/improved included: increasing the number of markets (Toronto particularly)/better locations, more/better parking, more events/entertainment, bigger/more spacious market area, more education (recipes, preserving, etc.).

15. What could be done to improve farmers' markets as a place to buy local food?

Suggested Improvements:	**Total %**
NET: Change in Hours/Opening – longer hours/extended hours, more days of the week, open year round, open evenings, other opening hours	24
NET: Vendors – More vendors, distinguish between local vendors/produce and those that are not/need to know where produce is from, ban Ontario Food Terminal from selling food/get rid of non-local vendors, consistency of vendors, more farmers, specialty vendors (meat, fish, more variety of vendors)	21
NET: Products – more variety/choice/selection, more specific items (ethnic, dairy, meat, homemade, baked goods , organic), more locally grown food, other specific foods available (more organic, preserves), only food from Ontario/Canadian foods	16
NET: Advertising/Awareness – more/better advertising exposure, awareness/public awareness, advertise to let public know value of supporting local	12
Lower prices, more competitive pricing, bring costs down, more affordable	10
NET: Location – more locations/more of t hem, better location/easier access, other locations (closer to home, downtown, lower income community, decentralized), closer to bus/terminal	8
NET: Parking – better/more parking, other parking (free, enclosed, easier to park)	4
More events/music/entertainment/workshops	4
Recipes/how to prepare food/certain foods/preserving workshops	3
More diverse/appeal to more diverse crows (not just whites)/First Nation represented	
Cleanliness/appearance/clean up stands/area	2
Better take-out options/prepared food	2
Other mentions of sellers (allow neighbours to sell for farmer/allow farmer assistants to sell/make it easier for farmers to sell)	2
Other: Sitting area/places to hang out, covered indoors (to extend season), more ATMs/better access to cash, allow debit cards/VISA/alternative payment method, publish prices	11
Nothing/none/no improvement necessary	10

COMPARING MARKET SHOPPERS – 2010 and 2012

INTRODUCTION: The fall 2010 survey focused on the overall experiences of shoppers with a focus on the last shopping trip for some factors (amount spent, items purchased), while the winter 2012 survey was more general, asking participants to recall the previous market season. The two timeframes are very different and could account for some of the differences in reported behaviour between fall 2010 and winter 2012.

The sample sizes are 339 in 2010 and 386 in 2012.

Shopper role

The prime household food buyer continues to dominate the mix of market shoppers – at least six in ten people are either solely responsible for purchasing or might be assisted on occasion by other household members.

	2010 - Total Mentions %	2012 - Total Mentions %
I am the main grocery shoppers	64	60
Grocery shopping is a shared task	34	38
Other	2	2

Average Expenditure

In 2010 shoppers reported spending an average of $40.10 on their last trip to the market; this figure declined to a guesstimate of $35.40 in 2012. While the 2012 average amount spent is lower, this should be viewed with some caution given that shoppers' memories could be somewhat inaccurate. Also, even though some of the respondents are going to year-round markets in the winter and may be thinking about a recent experience, it is quite possible that they are buying less due to the limited range of produce – the major purchase category.

Base: Respondents who spent about the same amount each visit	2010 - Total Mentions %	2012 - Total Mentions %
Under $19.99	14	18
$20 - $29.99	26	29
$30 - $39.99	18	22
$40 - $49.99	20	14
$50 - $59.99	10	7
$60 or more	13	10
Average Amount Spent:	40.10	35.40

History of Shopping At Markets

Answers are consistent from 2010 to 2012: about half of shoppers discovered farmers' markets in the last five years when the number of markets in and around the Greenbelt rapidly expanded. The remaining half has been exposed to markets for many more years.

About how long have you been shopping at farmers' markets?

	2010 - Total Mentions %	2012 - Total Mentions %
2 years or less	26	18
3 to 5 years	24	32
6 to 10 years	18	18
More than 10 years	33	31
Average No. of Years	7.6	7.7

Frequency of Shopping at Markets

The attendance frequency appears to have shifted towards lower frequency or 'at least once a month'. However it should be noted that the frequency options were adjusted in the 2012 questionnaire, adding 'every other week' – which applied to 21% of shoppers.

	2010 - Total Mentions %	2012 - Total Mentions %
More than once a week	8	8
Weekly	59	44
At least once a month	26	41
Less often	8	7

Reasons for Shopping At Markets

The 2010 survey asked respondents for the main reason, followed by all other reasons, for the last time they went to a market. In 2012, the question was more general: Why do they visit markets?

Shoppers consistently report that they are drawn to the market for a number of reasons, led by the priority of buying regular grocery items, but they also consistently indicate that markets are about much more than just stocking the larder. The market pull includes a chance to snack, see friends, enjoy a novel grocery shopping experience, etc.

All Reasons:	2010 - Total Mentions %	2012 - Total Mentions %
I want to buy regular grocery items	82	83
I went for a specific item	62	51
I went to buy a meal or snack to eat at the market	28	31
I went for an outing or as a tourist	26	20
I went to see friends/neighbours	32	19
NEW: I went because I have special food/dietary needs	-	10
I went for a special event or program	6	10
Fresh food/local food/buy local food	4	6
Support farmers/support local agriculture	3	5
Organic food	2	2
Am vendor/producer/farmer/volunteer	-	1
Other	10	3
None/no reason	-	1

Market Likes and Dislikes

Overall, shoppers are quite consistent on the factors that they like. A visit to the market is a satisfying, pleasurable experience. It combines the practical task of shopping with a friendly, ‘meet and greet’ environment and the knowledge that they are directly aiding local farmers/the local economy. In return for quality, tasty food that may not be easily available elsewhere, they are entertained and enlightened.

	2010 - Total Mentions %	2012 - Total Mentions %
Fresh, local food	97	89
Support for local farmers	91	88
Quality, tasty foods	81	77
NEW: Healthy food	-	71
Friendly, relaxed atmosphere	72	60
Buy organic food	55	49
Ability to meet local farmers	55	49
Reasonably Priced	29	43
Foods I can't easily find elsewhere	35	37
NET Community – events, support, art, meet friends	32	33
Learn about how things are grown	25	29
Fun events	10	21
Other	3	2
None of the above		1

Dislikes/Weaknesses…

Again, there are consistent factors that force market shoppers to compromise. The limited frequency and hours and the seasonal nature run contrary to the mainstream, 24/7, 'we never close' marketplace parameters. This poses an inconvenience for some shoppers. Standard supermarket amenities such as debit, credit and ample parking are not available either, but they are of secondary concern. One in four shoppers noted price differential, given the habit of buying cheap food, and criticized lack of choice, which could be particularly significant in smaller markets. Possibly, some shoppers are frustrated in their goal to buy a wider array of local food items, including the lower market penetration of meat, cheese/dairy and eggs.

	2010 - Total Mentions %	2012 - Total Mentions %
Limited hours	29	44
Short season (summer only)	45	35
Cost/price of food	28	26
Infrequent (only once a week)	29	26
Not enough vendors/booths	11	25
No ATM or debit machine	10	20
Parking problems/insufficient parking	10	18
Not enough choice	7	15
Hard to get to	4	13
Crowded/busy	-	1
Lack of variety/not enough specific food (organic)	-	1
Some poor quality/inconsistency in vendors	-	1
Other	5	1
None of the above	17	14

Items Bought Last Visit/Regularly

The items that people usually purchase at markets tend to coalesce around fluctuations of seasonal fresh produce. Other food essentials (eggs, cheese, herbs, bread, meat, etc.) have secondary appeal and possibly are bought less frequently. This comparison provides an overview of what comes first to mind, especially for the 2012 respondents, but could be a more accurate tally of what shoppers actually bought in 2010. In many cases the figures are very similar.

	2010 – Bought on Last Visit %	2012 - Regularly (When Available) %
Vegetables	91	90
Tender fruits (: e.g.: peaches, plums)	22	69
Apples and pears	55	69
Berries (e.g.: strawberries, blueberries, blackberries)	25	67
Eggs	21	32
Bread, baking	59	32
Herbs	19	24
Cheese	29	22
Meat (e.g.: beef, lamb, pork)	30	21
Snacks/Prepared food to eat at market	26	19
Honey	20	19
Coffee or tea	15	16
Plants/seeds	7	11
Chicken	9	10
Prepared food to take home	23	10
Cut Flowers	20	9
Maple Syrup	9	9
Specialty meat (e.g.: elk, boar, goat)	6	7
Specialty foods (e.g.: Tofu, chocolate, olive oil)	4	7
Jams, Jellies, Preserves	3	5
Crafts	3	1

Other Sources of Local Food

Market shoppers consistently buy foodstuffs at the same types of locations. Supermarkets lead but are closely followed by independent grocery stores. However, the significance of large format stores/supermarket chains and the independently owned and operated small food stores is dramatically different based on where people live. As this study reveals, Toronto shoppers are primarily flocking to these smaller format and specialty stores (meat/butcher, cheese, bakeries, etc.) while those in Central Ontario are much more likely to turn to the national chains.

In their quest to access fresh, local food, market shoppers also source it from the farmer (farmgate, pick-your-own and farm shares). Markets appear to play an integral role in the expanding 'field to table' distribution system.

5c. In the past 12 months have you bought locally grown food in other ways? See the list below and check all that apply.

	2010 - Total Mentions %	2012 - Total Mentions %
Grocery chain or other retail store	67	65
Independent grocery store	53	53
On-farm market/ Roadside stands/direct from farmer	40	44
Pick-your-own farms	29	34
Bought a share of a crop/CSA	11	12
Grow our food	-	2
Food box/FoodShare/delivery service	-	1
Share with family/friends/neighbours		1
Other	-	2
None of the above	7	6

Impacts of Shopping At Markets

While the two surveys explored the same types of behaviour change factors, the actual wording changed between 2010 and 2012. Overall, markets are having a positive impact on shopping, cooking and healthy eating patterns.

2012 As far as you can tell, has shopping at farmers' markets resulted in any ongoing changes? For each item below please indicate if as a result of shopping at farmers markets you are…	**Yes %**
Increasing your interest in where our food comes from.	81
Buying less processed food.	80
Eating a wider variety of fresh fruit and vegetables.	77
Eating more servings of fresh fruit and vegetables.	76
Cooking more from scratch.	63
Increasing your confidence that you can make healthy, tasty food.	62
Sharing more homemade meals with family and friends.	53
Increasing your cooking knowledge.	51

2010 *Based on your experience buying food at farmers' markets, have you:*	**Yes %**
Added more local food to the range of foods you/your family eat.	**92**
Increased my interest in buying fresh, healthy food.	**90**
Improved the overall menu of things you/your family eats.	**81**
Learned more about when various Ontario foods are in season.	**79**
Tried cooking new foods.	**75**
Learned more about local agricultural issues.	**55**
Increased the number of meals my family eats together.	**19**

Appendices

Appendix 1 – Survey Invitation

Possibility grows here.

Dear Friends of Farmers' Markets: The Greenbelt Farmers' Market Network wants to hear from you!

We need your feedback to help strengthen our farmers' markets.

It's easy – visit our website to fill out this online survey: www.canview.com/survey#XXX.

Everyone who completes our short online questionnaire has a chance to win $100 worth of farmers' market dollars to be spent at your favourite farmers' market.

If you have any questions you can call us at 416-536-9103 or email anne.freeman@sympatico.ca

The Greenbelt Farmers' Market Network project is an initiative funded by the Friends of the Greenbelt Foundation. Ontario's Greenbelt is over 1.8 million acres of green space, farmland, vibrant communities, forests, wetlands, and watersheds – all permanently protected by world-leading legislation. In return, the Greenbelt gives back much to Ontario, providing $5.4 billion to Ontario's economy through farming and food production, and $2.6 billion in ecosystem services annually.

The Friends of the Greenbelt Foundation is working to help farmers in the Greenbelt be more successful; to protect and enhance natural features; and to strengthen local economies. To learn more about the Friends of the Greenbelt Foundation, please visit www.greenbelt.ca

Survey Introduction:

Thank you for agreeing to take part in this survey. Your answers will be treated in confidence and will be pooled with others. Your feedback will be very helpful in assisting farmers' markets in planning to better serve the needs of shoppers.

When you have completed this survey, you will be eligible to take part in a draw for $100 market dollars that can be spent at your favourite farmers' market. The rules and entry form for the draw are at the end of the survey.

Appendix 2 – Questionnaire

GBFMN Final Questionnaire – 2012 Shopper Survey

Introductory Statement…..

1a.Thinking about who does the grocery shopping in your household – which statement is applicable?

I am the main grocery shopper	1
Grocery shopping is a shared task	2
Other (Please specify)	3

1b.How many people including you that live in your household are you shopping for? __________

One	*1*
Two	*2*
Three	*3*
Four	*4*
Five or more	*5*

1c.How many adults over the age of 18 including you would that be? __________

1d. How many children under 18 years would that be?_________

One	*1*
Two	*2*
Three	*3*
Four	*4*
Five or more	5

2a.Did the farmers' market that you usually <u>shopped at</u> in 2011 close for the winter season?

Yes	ASK 2b
No	SKIP TO Q3
Don't Know	SKIP TO Q3
I didn't shop at a farmers' market in 2011	TERMINATE

2b. Is there another year round conveniently located farmers' market that you are now shopping at?

Yes	1
No	2
Don't Know	3

3a.Now thinking overall about the amount of money you tended to spend on each visit to a market in 2011 – which statement is more accurate?

a. I usually spent about the same amount each visit.	ASK Q 3b
b. The amount I spent varied a lot.	SKIP TO Q4
c. Don't know/Can't recall	SKIP TO Q4

3b. As far as you can recall, how much money did you <u>usually</u> spend on each visit to a market in 2011? Please select from the ranges below.

Under $10	1
$10 – 19.99	2
$20 - $29.99	3
$30 - $39.99	4
$40 - $49.99	5
$50 - $59.99	6
$60 - $69.99	7
$70 or more	8
Don't Know/Can't Recall	9

4a. Thinking back over the 2011 farmers' market season, about how often did you usually visit a farmers' market?

More than once a week	1
Weekly	2
Every other week	3
At least once a month	3
Less often	4

4b. About how long have you been shopping at farmers' markets?

Less than 1 year	1
1 to 2 years	2
3 to 5 years	3
6 to 10 years	4
More than 10 years	5
Don't know	6

5a. Now thinking overall about your experiences at markets in 2011, what did you <u>like</u> about shopping at farmers' markets? Please select all that apply. PROGRAM FIRST SELECTION AND THEN OTHERS

Fresh, local food	1
Healthy food .	2
Support for local farmers	3
Ability to meet local farmers	4
Friendly, relaxed atmosphere	5
I learn about how things are grown	6
Community events, meet friends	7
Buy organic food	8

Reasonably priced food	9
Quality, tasty food	10
Foods I can't easily find elsewhere	11
Fun events	12
Other (Please specify)________________________	
None of the above	13

5b. And looking back, what did you dislike about shopping at farmers' markets in 2011?

Infrequent (only once per week)	1
Short season (summer only)	2
Limited hours	3
Cost/prices of food	4
Not enough choice	5
Parking problems/insufficient parking	6
Not enough vendors/booths	7
No ATM or debit machines	8
Sell out quickly of items I want	9
Hard to get to	10
Other (please specify) ___________	11
None of the above	12

5c. In the past 12 months have you bought locally grown food in other ways? See the list below and check all that apply.

Pick-your-own farms	1
On-farm market	2
Bought a share of the crop/CSA	3
Independent grocery store	5
Grocery chain or other retail store	6
Other (Please specify) ___________________	

6a.Thinking back over the 2011 farmers' market season, what was your **main reason** for visiting?

I went to buy regular grocery items	1
I went for a specific item	2
I went to buy a meal or snack to eat at the market	3
I went to see friends/neighbours	4
I went because I have special food/dietary needs	5
I went for an outing or as a tourist	6
I went for a special event or program	7

Other (Please specify)………… 8
None/no other reason 9 SKIP TO Q. 76b.

6b. Were there any other reasons why you usually visited a market in 2011? MORE THAN ONE PERMITTED

I went to buy regular grocery items 1
I went for a specific item 2
I went to buy a meal or snack to eat at the market 3
I went to see friends/neighbours 4
I went because I have special food/dietary needs 5
I went for an outing or as a tourist 6
I went for a special event or program 7
Other (Please specify)………… 8
None/no other reason 9

MARKET PURCHASING – ITEM AND FREQUENCY

7. Thinking back over the last year and the things you bought at farmers' markets, for each item below, did you buy it **Regularly, Occasionally or Never** at a market in 2011?

	Regularly (When In season/Available)	**Occasionally**	**Never**	**Can't Recall**
Vegetables				
Berries (e.g.: strawberries, blueberries, blackberries)				
Tender fruits (: e.g.: peaches, plums)				
Apples and pears				
Herbs				
Meat (e.g.: beef, lamb, pork)				
Chicken				
Specialty meat (e.g.: elk, boar, goat)				
Eggs				
Cheese				
Bread, baking				
Crafts				
Cut Flowers				
Plants/seeds				
Prepared food **to take home**				
Snacks/Prepared food to eat at market				
Specialty foods (e.g.: Tofu, chocolate, olive oil)				
Coffee or tea				
Maple Syrup				
Honey				

Jams, Jellies, Preserves				
Nothing/No purchases OTHER (Please Specify) _______________________________				

8. As far as you can tell, has shopping at farmers' markets resulted in any ongoing changes? For each item below please indicate if as a result of shopping at farmers markets you are …..**Yes, No or Don't Know**

	Yes	No	Don't Know
Eating more servings of fresh fruit and vegetables.			
Eating a wider variety of fresh fruit and vegetables.			
Cooking more from scratch.			
Buying less processed food.			
Increasing your cooking knowledge.			
Sharing more home made meals with family and friends.			
Increasing your confidence that you can make healthy, tasty food.			
Increasing your interest in where our food comes from.			

9a. Where do you regularly shop for food now that most markets are closed for the season? Please select all that apply from the list.

Grocery chain/supermarket chain	1
Walmart/Costco	2
Independent grocery store	3
Independent butcher/meat store	5
Independent bakery	4
Independent cheese shop	5
On-farm market	6
Food co-op	7
Year round CSA/farm share	8
Other specialty stores	9

Other: Please specify ______________________

9b. Here is a list of statements about <u>shopping</u> at grocery stores and shopping at farmers' markets. For each do you **Agree or Disagree**?

	Agree	**Disagree**	**Don't Know**
When I shop at supermarkets I look for and try to buy locally grown produce if it is available.			
I wish that the supermarkets I shopped at had more locally grown or locally produced items.			
Overall, I feel that the produce I buy at markets tastes better and is more nutritious than the produce I buy at supermarkets.			
Generally speaking I think that the items/produce that I buy at the market is better quality than what is available in the supermarkets.			
I buy more organic food at farmers' markets than at supermarkets.			

10c. Do you find that as a result of shopping at farmers' markets, you are trying to buy more seasonally?

Yes 1
No 2
Don't Know 3

10d. Here is a list of different ways of eating seasonally in winter. For each please indicate **Yes I do This, No I don't do This** or **Don't Know**

	Yes, I do this	No, I don't do this	Don't Know
I buy and eat more storage vegetables e.g. carrots, beets, turnips, squash, etc. than we did in previous years.			
I avoid buying imported fruit that can be locally grown.			
I can or freeze locally grown fruit and vegetables when they are in season here.			
I buy more locally grown frozen or canned seasonal fruit or vegetables (instead of buying the fresh, imported ones).			
I change what I cook so that I now use more seasonally grown or processed local items.			
I buy produce regardless of whether the item is in season here or not.			

Comparing Farmers' Markets and Supermarkets

11a. In comparing shopping at farmers' markets and shopping at supermarkets, are farmers' markets **Better, The same** or **Not as Good as** supermarkets in terms of …..Please provide an answer for each item below.

	Better	The same	Not as Good	Don't Know
A friendly, relaxed atmosphere				
A place to meet the community/friends				
Providing facts on how to prepare new items				
Encouraging healthy eating				
Providing facts on how to store produce				
Being good for the local economy				
Prices that I can afford				
Providing facts about how our food is produced				
Inspiring me to prepare new things				
A good selection of ready to serve convenience foods				
Environmentally friendly way of getting our food				
Helping me understand the importance of supporting local farmers				
Welcoming all kinds of people/everyone				

11b. Here is a list of factors for comparing fresh produce you buy at farmers' markets and fresh produce you buy at supermarkets. Do you think that the produce you buy at the market/markets is **Better, The same** or **Not as good as** in terms of …. than what you buy at supermarkets? Please provide an answer for each below:

	Better	The same	Not as good as	Don't Know
Freshness				
Taste/Flavour				
Health/Nutrition				
Overall quality				
Environmental friendliness				
Keeping more money in the local economy				
Long lasting/keeping well in my fridge				
Visual appeal				
Good value for money				

11c. Here is a list of statements that shoppers have made about farmers' markets. For each would you please indicate: Strongly Agree, Somewhat Agree, Somewhat Disagree, Strongly Disagree.

	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
When I shop at farmers' markets I am more inspired to try cooking/making new things than when I am shopping at grocery stores.				
Overall, farmers' markets provide me with more education about healthy eating than the supermarkets I shop at.				
Our family/household is eating the same amount of fresh fruit and vegetables no matter where I/we shop.				
I think that I experiment more with new things when I shop at farmers' markets.				
I tend to cook more homemade meals when I shop at farmers' markets than when I am shopping at supermarkets.				
I tend to buy more processed and ready-made items that may not be as healthy when I am shopping at the supermarket.				
Overall, I eat healthier meals when I am shopping at farmers' markets compared to shopping at supermarkets.				
Our family eats more meals together when I shop at farmers' markets.				

11d. What changes, if any, has shopping at farmers' markets had on the food that you are eating and preparing? **OPEN ENDED**

CHILDREN AND EATING (12A AND 12B ONLY FOR HOUSEHOLDS WITH CHILDREN UNDER 18 YEARS)

12a.Do you tend to take your child/children when you shop at: Please answer below:

	Always	Sometimes	Never	Not Applicable
Farmers' markets				
Supermarkets				

12b. Here are some statements parents have made about shopping at farmers' markets. For each do you Agree, Disagree or Don't know?

	Agree	Disagree	Not Applicable	Don't Know
I have noticed that farmers' markets have taught my child/children to appreciate fresh, healthy food more.				

My child/children are more willing to eat fresh fruit and vegetables when we buy them at a farmers' market.				
The contact with farmers at the market has had a positive impact on my child/children's attitude towards eating locally grown food.				
Taking them to farmers' markets makes it easier for me to get them to try new vegetables.				
I bring my child/children to the farmers' market because I want them to learn about healthy, local food.				

FOOD WASTE

13. Here is a series of statements about food waste (purchased food that ends up in the garbage or the green bin for composting). For each, do you Agree or Disagree?

	Agree	Disagree	Don't Know
I find that there is less food waste with produce that I buy at farmers' markets because it is fresher.			
Generally, I am not really aware of how much food goes into the garbage at my house.			
I think that buying locally grown food at farmers' markets means that we try harder not to waste it.			
I think we wasted more food when I tried new things out from farmers' markets.			
I think that there is less food waste with things from the farmers' markets because they teach how to store and prepare it.			
I find that I buy more and waste more with bargain supermarket items.			
I think there is less food waste when I buy prepared/ready made foods.			
I have less food waste when vendors gave me the option of buying only as much as I need.			
I think that I have less packaging waste when I shop at farmers' markets.			

14a. Looking ahead to spring-summer 2012 where do you think you will buy locally grown food? Please check all that apply.

Farmers' market	1
Pick-your-own farms	2
On-farm market	3
Buy a share of the crop/CSA	4

Independent grocery store	5
Grocery chain or other retail store	6

14b. Thinking about buying food at farmers' markets, how often do you think you will shop at farmers' markets:

About the same as I did in 2012	1
More than in 2012	2
Less than in 2012	3
Don't know	4

14c. Looking ahead to the amount of your food shopping budget you are likely to spend at farmers' markets in 2011, which of the following is most accurate:

About the same as I did in 2011	1	
More than in 2011	2	
Less than in 2011	3	
Don't Know	4	SKIP TO Q. 15

14d. Why is that? Please explain. ____

13. What could be done to improve farmers' markets as a place to buy local food?

BASIC DATA

Now, before closing, please help classify our information.

In general, would you say your health is:

Excellent	1
Very good	2
Good	3
Fair	4
Poor	5
Don't know	6

A. GENDER

Female	1
Male	2

B. Would you please indicate in which age group you belong?

Under 21	1

21 - 30	2		
31 - 40	3		
41 - 50	4		
51 - 60	5		
61 - 70	6		
71 and over	7	Prefer not to answer	8

C. What is the highest level of education that you have completed?

Public school	1
Some high school	2
Graduated high school	3
Community college or University	4

D. How would you classify your occupation?

Professional	1
Manager/business owner	2
Sales/clerical	3
Skilled/trades	4
Unskilled	5
Farmer	6
Homemaker	7
Retired	8
Student	9
Unemployed	10
Other	11

E. Were you born in Canada?

Yes	1
No	2 ASK Q.F

F. In what country were you born? ________________________

g. Please provide the first three digits of your postal code. _______________

Thank you for taking part in the survey.

If you would like a chance to win $100 worth of shopping dollars that can be spent at your favourite farmers' market, please provide your name and a phone number where we can reach you. We promise that we will not use this information to contact you in the future or sell your contact information.

Name___________________________________

Phone No. ______________________________

Favourite Farmers' Market ____________________

☐I would like to receive future communications related to farmers' markets.

Contest Rules:

☐ I have read and agree to the rules below. (MUST COMPLETE)

Official Contest Rules

CONTESTANT ELIGIBILITY

Contest is open to all legal residents of Ontario. Notwithstanding the above, the contest is not open to individuals who are directly associated with the Greenbelt Foundation, including:

Employees of the Friends of the Greenbelt Foundation or Greenbelt Farmers' Market Network or Informa Market Research,

The agents or representatives of the Foundation (including their respective divisions, subsidiaries, affiliates and advertising or promotional agencies) and suppliers in connection with this contest. (collectively, the "Excluded Individuals"). This Contest is not open to the immediate family members of the Excluded Individuals, and all other persons with whom the Excluded Individuals reside, or

Employees, managers and vendors at participating farmers' markets.

Prospective winners must answer a skill-testing question to qualify.

HOW TO ENTER

No purchase is required to enter. Odds of winning will be dependent on the number of eligible entries received prior to the contest closing date, November 12, 2010. Entries will not be eligible if sent by any method not specified above or if not submitted within the duration of the contest period. One entry per person.

PRIZE AND PROCESS

One prize will be awarded. Winner will be selected at random from the list of all eligible contestants, by an independent third party, and will be contacted by telephone. Approximate retail value of each prize is $100.00 CDN. There is no cash prize. Market Dollars may be redeemed ONLY at the market stated on the winners' entry form. In the event that the selected market has closed for the season, contest organizers will give the winner the choice of receiving vouchers to spend in 2011, or vouchers to spend at a selected year-round market.

In order to be declared a winner, a potential winner must be in compliance with these Official Contest Rules and, in particular, the following:

Contest organizers must be able to reach the potential winner, by telephone, on or before November 30, 2010.

The potential winner must complete, sign and return a standard declaration and release form prepared by the Greenbelt Farmers' Market Network within seven (7) business days from the date on which the form is sent to the potential winner.

If a potential or declared winner is not in compliance with these Official Contest Rules, the Foundation reserves the right to disqualify such entrant from the Contest.

Entrants will not be individually contacted, except for selected entrant or declared winner, who will be contacted by telephone.

GENERAL

All entries become the sole property of, and are subject to verification. Any entry that is illegible, incomplete, altered, or contains false information is invalid.

The Friends of the Greenbelt Foundation, Greenbelt Farmers' Market Network and Informa Market Research assume no responsibility for entries lost, stolen, delayed, damaged or misdirected, or for the failure, interruption or delay of any communication to be received, for any reason.

Prize is non-transferable, must be accepted as awarded, and cannot be exchanged by a declared winner for cash or other substitutes.

The Greenbelt Farmers' Market Network reserves the right, at their sole discretion and without prior notice, to amend, cancel, close, suspend or reinstate this Contest at any time and for any reason whatsoever.

By entering the Contest, each entrant agrees to abide by these Official Contest Rules, which are subject to change without notice to Contest entrants individually, and each entrant releases the Foundation, the Greenbelt Farmers' Market Network, and their respective parents, affiliates, subsidiaries, directors, officers, employees, representatives, agents and advertising and promotional agencies from any damage, loss or liability suffered as a result of or arising from the entrant's participation in the Contest.

The Contest is void where prohibited by law and is subject to all applicable federal, provincial and municipal laws and regulations.

The Contest and the these Official Contest Rules shall be exclusively governed by and construed in accordance with the laws of the province of Ontario. Any dispute shall be adjudicated in the courts sitting in Toronto, Ontario.