CONSUMER CONCERNS ABOUT FOOD

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INTRODUCTION

The formulation of a national food policy is a matter of national priority. It should be reached through a consultative process, taking into account the needs and interests of all parties that will be affected. The study described in this report was designed to serve as a contribution to that process.

The Food Policy Group, Consumer and Corporate Affairs Canada, commissioned this study in November 1977 to investigate the concerns that consumers have about food and the food industry, since an understanding of the concerns of the final food user is an essential input in the formulation and implementation of national food policy. The major objectives of the study were:

a) to identify the range of general concerns about public issues that consumers have and to identify in particular their concerns about food and the food industry; and

b) to establish an order of priority among these concerns.

The findings of this study, presented to the Food Policy Group in March 1978, have been valuable to Consumer and Corporate Affairs Canada and other government departments and agencies concerned with national food policy. For example, the main findings of the study were reported to the National Food Strategy Conference in February 1978 by the Minister of Consumer and Corporate Affairs, and the results have been used by the Food Policy Group to help develop its priorities and work plans. This report is intended to make available to a wider audience a brief summary of the most significant findings of the study.

Part I describes the first phase of the study, which was directed to eliciting a range of general consumer concerns with respect to Canada today, food in particular, and the relationship between, and relative importance of, specific issues within these areas of concern. This was accomplished through setting up two focus group discussions and analyzing the matters upon which the participants focussed during the discussions.

One focus group consisted of urban dwellers, the other of rural dwellers. There were twelve participants in each group, all of them women between 25 and 60 years of age. The groups were equally divided between women who did and did not work outside the home. the urban group was equally divided between women with white-collar and blue-collar backgrounds, while the rural group represented farm, blue-collar and white-collar backgrounds. Each discussion lasted about two and one-half hours.

Part II deals with the design of the second phase of the study, which was intended to provide quantitative estimates of the range and depth of consumer concerns across Canada. Content analysis of responses obtained during the two focus group discussions provided an information base from which a questionnaire was constructed to investigate concerns about general public issues and about food and the food industry. the questionnaire was administered to 1523 respondents across the ten provinces. Respondents were women 18 years of age and over who were the main food shoppers for their households. Interviewing was done from a central battery of telephones in twenty-three field offices across the country. The average time for conducting an interview was twenty minutes.

Participation in both group discussions and the questionnaire sample was limited to women. The basis for this decision was that previous research had indicated that, for most families, with or without children, women have by far the greater resposibility for purchasing food and for determining the form and type of food consumed by the family.

The questionnaire first asked respondents to identify the public issues they were most concerned about and to score according to level of concern 17 public issues drawn from content analysis of the focus group discussions. Respondents were then asked about their concerns regarding food and related issues and asked to score according to level of concern a list of twenty food-related issues, again drawn from the focus group discussions.

Respondents were questioned in greater detail about their major food concerns. They were asked to identify their greatest food concerns and to explain the reasons for their concern. They were also asked to identify the participants in the food industry, from farmers to food retailers, whose actions and activities were of most concern to them.

The questionnaire contained a number of questions about shopping behaviour, asking whether respondents were familiar with the Universal Product Code, whether they shopped for food mostly in one store or went from store to store, whether they had encountered bad experiences while shopping for food and what action they has taken. Finally, respondents were asked what they felt the government should do about their food concerns.

For purposes of the analysis of these consumer concerns, information was also collected about household size, ages and occupations of family members, level of education, occupation, income, and languages spoken. These data and regional information provided eleven classification variables which, when cross-tabulated with the thirty-three question components concerning general and food-related issues, yielded 363 tables for quantitative analysis.

Part III summarizes the findings of the survey and presents a set of summary tables dealing with concerns for the sample as a whole and some of the most significant variations by region or household type.

Both the group discussions and responses to the questionnaire confirmed that concern about food and the food industry per se was not right at the top of most consumers' hierarchy of concerns. However, the perceived high and rising price of food, in association with such general concerns as inflation, high and rising prices generally, and the high cost of living, serves to create an aggregated concern, largely focussed on price issues,that was the major composite concern of most consumers.

In addition, both spontaneous and elicited responses of consumers revealed a clear credibility gap between the consumer and the processing, distribution and retailing sectors of the food industry. These sectors are perceived by many younger consumers to operate in a foggy, mysterious jungle. Probably reflecting the fact that these are the sectors with which they have the closest and most direct contact, consumers often laid the blame for rising and fluctuating prices firmly at the door of these sectors. Clearly, there is a role for both government and the food industry to play in clearing this jungle by providing consumers with the type of information they can use both to understand better the operations of the food industry and to assist them in making food purchase decisions. Examples of the government's response to this need include information programs such as Agriculture Canada's Food Price Dialogue Kit and Consumer and Corporate Affairs' Food Talk Program and Food Basics Kit.

PART I

GROUP DISCUSSIONS ON CONSUMER CONCERNS

The initial, qualitative phase of the study consisted of two group discussions intended to delineate the range of concerns held by consumers about public issues generally and about food in particular.

1. Research Methodology

Two group discussions were conducted, one in Toronto with urban dwellers, the other in Kitchener with a rural emphasis. In both groups, respondents were women aged between 25 and 60 years. There were 12 women in each group, of whom half worked outside the home. No respondent had attended a group discussion in the last year and none worked for or had a close relative working for an advertising agency, marketing or advertising research company. None knew more than one other member of the group.

In the Toronto group there was equal representation of blue and white-collar respondents. In the Kitchener group, four respondents were living on farms, one was from a white-collar background and the remainder were in the blue-collar category.

As noted already, only women were selected for the discussions because previous research indicated that in the family unit, whether or not there are children, women have by far the major responsibility for purchasing food and determining the form and type of food consumed by the family. This does not preclude male interest in food policy. It merely reflects the reality of the marketplace.

The discussion format was identical for both groups: a discussion, moderated by a discussion leader provided by the contractor, about consumer concerns in general followed by a detailed discussion about food in particular. Group sessions ran for about two and one-half hours and respondents were enthusiastic throughout. There was little evidence of respondent fatigue.

2. Concerns about Food Relative to other Issues

Consumers both in Toronto and Kitchener seemed far more concerned about issues such as health care, education, housing, waste and pollution, the economy generally, unemployment, today's youth and their future, than about food. However, the general concern about rising prices incorporated the acknowledgement that high and rising food prices were of concern to most group participants.

3. Concerns about Food

3.1 Food Additives

On an unprompted basis, the most worrisome concern about food was food additives. Food additives were disliked primarily because consumers did not understand what they were (i.e., the chemical or technical jargon was confusing) or what their purpose is in today's food products. Some respondents felt that food products containing additives were somehow deficient in nutrition. Others were concerned about the long-term effects on health. A few cited "red dye" as particularly harmful to children with hyperactive tendencies.

Only one respondent indicated any concern about herbicides or other chemical treatment of food products before harvest. Although consumers admitted that they would prefer ideally that no sprays or even chemical fertilizers were used (many were growing their own vegetables for seasonal use), they were realistic in evaluating the situation and stated that without sprays to control plant diseases and pests, there would be sparse crops and possible food shortages. Herbicides, therefore, were considered the lesser of the two evils. In this area, consumers wished to see more stringent controls on additives and artificial or "nutrition empty" food products or, at the very least, some simplification of terms which would enable the consumer to understand the nature and purpose of additives.

3.2 Packaging and Product Sizes

One very common concern raised was the lack of standardization in package sizes. Respondents claimed that there were too many sizes and no commonality of sizes across product classes. To add to the confusion, some products were expressed in metric sizes whose necessarily large numbers (e.g., 157 ml.) were confusing to the homemaker accustomed to ounces. Furthermore, these numbers were usually irregular (157 ml.) rather than rounded off units (150 ml.).

Only one respondent claimed she would like additional bulk or institutional sized containers.

Packaging was another area of concern. Many homemakers found some packaging deceiving ("too large a box for its contents") or too elaborate, contributing to additional cost of products. Fresh meat and vegetable packaging was particularly critized as being unnecessary. Consumers would rather chose their own amounts.

3.3 Food Prices

Surprisingly, food prices were not a major issue with many group respondents. While all respondents agreed that food costs had increased drastically over the past few years, most did not feel that increases were out of proportion to salary increases over the same period of time. However, with respect to price increases, most consumers felt that although they were paying more, they were getting inferior quality products. For the most part, respondents agreed that much of the increase in food costs came from buying largely "convenience foods" and that if one was prepared to spend more time in the kitchen working with basics, "we are still pretty well off".

Although most respondents were aware of unit pricing tags provided by most major retailers, few used them because thy were "never up to date" or not located close to the product at the display. Some women indicated that they took a hand calculator with them while shopping to determine the best buy.

A bigger concern for consumers was week-by-week variations in prices within the same store, particularly significant price increases. Respondents were particularly annoyed when retailers changed prices on what the shoppers recognized as being old stock.

3.4 Retail Food Stores

Respondents recognized differences between retailers and most had their own favourite stores. Competition between chains was considered satisfactory. Indeed, a few women in Toronto claimed that there was too much competition, so that one had to be an "organizer" to keep all the "best buys" sorted out among the advertised specials.

3.5 Advertising

Advertising was not a major issue. Most complaints about advertising were directed toward child-related products.

3.6 Universal Products Code (UPC)

Most respondents appeared to have little awareness about the UPC or its purpose. Those who were aware did not generally approve. They wanted to see prices on the products at the checkout and to be able to double-check their bills. The only perceived advantage was faster checkout time, which most urban respondents cited.

3.7 Food Policy and Government Involvement in the Food Industry

Respondents had little awareness about current food policies and expressed little interest in them. Those in the Kitchener group expressed more concern than those in Toronto about government involvement in food policy. They stated that government only confused issues for them. "They never complete what they start and they only add to costs by making too many restrictions, which cause processors and grocers additional expenses" which are merely passed along to the consumer. Several respondents cited bilingual labels as an example where "printing costs would be double".

The only area in which group respondents wanted more government involvement was in the area of food additives, if not reducing the number of allowed additives, at least elaborating on their purpose. They also felt that there should be more control on ingredient lists to prevent processors from using "and/or" statements. Consumers wanted to know, for example, whether a product contains corn oil or palm oil.

3.8 Future Food Supply

The consumers in the two groups did not consciously think about future food supply, particularly not on a worldwide scale. they were more concerned about the quality than the quantity of future food supplies.

PART II

QUANTITATIVE SURVEY OF CONSUMER CONCERNS: DESIGN

Consumer concerns in general and specific concerns about food and the food industry were monitored in the quantitative survey. Construction of the survey questionnaire was based on the results of a content analysis of the group responses in the two discussion groups described in Part II. This questionnaire was administered to 1523 respondents across the ten provinces. Qualified respondents for the survey were women 18 years of age and over who were the main food shoppers within the household. The interviewing was done in late November and early December 1977, from a central battery of telephones in 23 field offices across Canada. Average time for conducting an interview was 20 minutes. All fieldwork was supervised and a minimum of 10 per cent of all interviews were monitored to ensure that accuracy, consistency and quality were maintained.

1. Composition of the Sample

The sample was drawn randomly by computer from a continually updated national listing of over 200,000 telephone numbers. Four names were selected to yield one completion. The sample included both urban and rural potential respondents. Regional distribution of the final sample was:

Region	Number of Respondents
Maritimes	305
Quebec	324
Ontario	303
Prairies	313
British Columbia	278
Total	1,523

Prior to analysis, the data representing the consumer responses to questions posed in the questionnaire were weighted to approximate the regional distribution of households in Canada, as follows:

Region	Weight Used
Maritimes	0.46
Quebec	1.23
Ontario	1.82
Prairies	0.92
British Columbia	0.54

All responses were cross-tabulated by 11 classification variables: region, city size, age of respondent, educational level, occupation of head of household, whether or not the respondent was working outside the home, family income, family size, number and ages of children, and whether English, French or both were spoken by the respondent.

The sample size (approximately 1500) was selected to ensure that an acceptable degree of statistical confidence could be attached to the results at both the total sample and subsample level. For example, using the usual formula for an attribute, the largest error for the whole sample of 1500 at the 95 per cent level would be $\pm$ 2.53 per cent. This means that an answer in which 50 per cent said yes and 50 per cent said no would actually be expected to fall within the range 47.5 to 52.5 per cent 19 times out of 20. When analyzing the data on a regional basis (300 respondents), the statistical error would be $\pm$ 6 per cent or less at the 50 per cent level. Thus, the sample is of sufficient size that consumer concerns can be cross-tabulated with any one of the classification variables. For example, consumer concerns can be analyzed by region or, say, by age group, with full statistical confidence but cannot be analyzed by both -- that it, consumer concerns by region by age group. In the latter case, the relatively small size of individual analysis cells (for example, respondents 25 to 34 years of age in British Columbia) would generate such large standard errors in the results as to be of little statistical value.

2. Construction of the Questionnaire

The questionnaire used as the vehicle to measure consumer concerns is presented in full in the appendix. Essentially, there were four major sections to the questionnaire:

a) An initial set of questions designed to elicit unpromted responses on consumer concerns in general, supported by a list of general concerns derived from the group discussions. Respondents were asked to rank the prompted concerns as to whether they considered each issue of major or minor concern. To avoid a response bias, issues were rotated in order of presentation.

b) A battery of questions designed to elicit unprompted responses on consumer concerns about food, supported by a list of specific food concerns, again derived from content analysis of the group discussions and rotated in order of presentation, which respondents were asked to rank according to degree of concern.

c) A section that focussed on consumer shopping behaviour and food shopping experiences, and elicited opinions on what the government should do about food-related concerns.

d) A series of questions designed to elicit relevant demographic and other information for classification purposes.

There were thrity-three question components in all in sections a, b, and c. Responses to these questions were cross-tabulated by the eleven classification variables contained in section d, yielding 363 separate tables containing information on consumer concerns about food and general public issues.

PART III

QUANTITATIVE SURVEY OF CONSUMER CONCERNS: RESULTS

This section summarizes the most significant findings of the study. In most cases, the summary focusses on findings for the complete sample -- i.e., those concerns which appear to be held by most consumers in all age groups, all levels of income, all provinces, etc. Where significant differences were apparent in the response patterns of different groups, these variations are noted. Information is provided on consumer concerns about general issues (both unpromted and prompted responses) and their more specific concerns about food, again on an unprompted and prompted basis.

1. General Issues -- Unprompted Responses

Respondents were asked to specify the subjects or issues that most concerned them in Canada today. On average, two "concerns" were identified per respondent. Summary results are presented in Tables 1 and 2.

(Table 1)

Table 1 lists the eleven issues mentioned by at least 4.9 per cent of the sample and the percentage which mentioned it. Over one-quarter of all respondents said that "unemployment in Canada" was a major concern. National unity and/or Quebec separatism was mentioned by 14 per cent. The issues of inflation and the high cost of living each were mentioned by 12 per cent of all respondents. Additional inflation-related concerns were high prices/rising prices and the high price of food, which were mentioned by 6 and 5 per cent of all respondents respectively. Aspects of education, the economy generally, the government, young people, and politics and specific political personnel were identified as being of concern to 10, 9, 6, 6, and 5 per cent of respondents, respectively. Five per cent of the sample indicated no subjects or issues with which they were currently concerned.

(Table 2)

Table 2 relates some of these general issues to the classification variables identifying different consumer groups. These data show that unemployment was most frequently mentioned as a concern in British Columbia and least in Quebec. National unity

Table 1 Issues Perceived by Consumers as Being of Major Concern

Issue	% of Sample Mentioning
Unemployment	26.8
National Unity/Quebec Separatism	13.7
High Cost of Living	11.8
Inflation	11.8
Education	9.8
The Economy	9.2
High Prices/Rising Prices	6.4
Young People	6.0
Government	5.9
Politics	5.3
No Concerns	5.2
High Price of Food	4.9

Table 2 Issues Perceived by Consumers as Being of Major Concern Cross-Tabulated by Selected Classification Variables

Issue	Classification Variable Region						Percentage of Total Sample
	Maritimes	Quebec	Ontario	Prairies	British Columbia		All Categories
Unemployment	29.8	21.5	28.5	24.5	36.1		26.8
	Income						
National Unity/ Quebec Separatism	$10,000	$10,000-14,999	$15,000-19,999	$20,000-plus			Total Canada
	8.4	10.5	12.9	24.9			13.7
	Age						
	18-24	25-34	35-44	45-54	55-64	65 plus	Total Canada
High Price of Food	3.1	4.2	5.2	4.0	7.3	7.6	4.9

and/or Quebec separatism was of particular concern to respondents in the higher income brackets. The high price of food was noted particularly by older respondents.

2. Level of Concern about General Issues -- Prompted Responses

Respondents were read a list of subjects that had been identified in the earlier focus group discussions as being important or of concern to consumers. They were asked to score these on a scale from 10 (very concerned) to 1 (not very concerned). Items on the list were:

health and health care	crime
inflation	government spending
waste	pollution
food	energy
status of women	national unity
housing	discrimination
senior citizens	taxes
unemployment	today's children
education	

Table 3 summarizes consumers' levels of concern about these issues. The mean score for each issue is shown in column 1. Column 2 shows the percentage of respondents scoring an issue at 10, column 3 shows those scoring it at 8 or more, and column 4 the percentage scoring the issue at 7 or less. The separation of scores into these three categories is somewhat arbitrary, but such categorization does provide a simple proxy measure of the degree and range of concern for selected issues.

(Table 3)

The subject "inflation" and the highest mean score (8.5). That is, an average, respondents expressed most concern about this subject relative to all other pre-selected issues. Only three other subjects had an average score of 8 or more. These were crime (8.1), unemployment (8.1), and education (8.0). However, concern about food received a relatively high mean score of 7.9. On average, only three of the listed subjects were scored at below 7, status of women (5.8), housing (6.2), and discrimination (6.8).

Table 3 Level of Concern of Consumers About Pre-Selected Issues

Issue	Mean Score	Percentage of Respondents Scoring* Issue At: 10	8 or More	7 or Less
Inflation	8.5	41.6	76.1	23.5
Crime	8.1	39.4	70.3	29.2
Education	8.0	34.9	69.0	29.4
Unemployment	8.1	35.2	67.6	31.5
Today's Children	7.9	39.1	66.9	30.7
Food	7.9	30.9	66.1	32.5
Health & Health Care	7.5	25.7	61.2	37.6
Government Spending	7.8	33.7	61.2	35.4
Taxes	7.5	28.5	58.1	40.4
Pollution	7.5	26.9	57.9	40.9
Energy	7.6	23.9	57.6	40.4
Senior Citizens	7.5	23.9	56.9	40.8
Waste	7.2	21.6	53.0	45.2
National Unity	7.1	25.1	50.3	45.3
Discrimination	6.8	18.2	42.4	54.1
Housing	6.2	15.0	38.3	57.9
Status of Women	5.8	11.9	29.7	63.5

* Score 10 = very concerned; Score 1 = not very concerned

Table 4 Level of Concern About Food Cross-Tabulated by Family Size Category

Issue	Classification Variable: Family Size (No. of Persons) 1	2	3	4	5-6	7-8	All Categories
Food (Mean Score)	7.6	7.7	7.7	8.1	7.9	8.5	7.9

More than three-quarters of all respondents score inflation at 8 or more, indicating a very high degree of concern for this issue. In rank order, crime, education, unemployment, today's children and food were issues that were rated at 8 or more by less than three-quarters but more than two-thirds of respondents. Almost two-thirds of the sample (66.1 per cent) scored food at 8 or more on the concern scale, and of these about half scored food at the highest level of concern.

Table 4 relates mean score on level of concern about food to size of family, showing that families with four or more members indicated a higher level of concern about food than smaller families.

(Table 4)

3. Reasons for Concern about Health and Health Care, Inflation, Waste and Food

Each respondent who had scored health and health care, inflation, waste, and food at 9 or 10 was asked to specify, on an unpromted basis, the major reasons for their concern about these issues. Specific information on health, inflation, and waste was sought as the content analysis of the group discussion material indicated that these three issues, typically, provide unprompted discussion of food-related issues. As a result, a greater in-depth look at these subjects, as well as examination of the views of respondents specifically indicating concern about food, seemed justifiable. Each respondent was given an opportunity to provide more than one response. Thus, the percentage figures in Tables 5 through 10 in some cases total over 100 per cent.

3.1 Health and Health Care

A little over one-third of all respondents scored this subject at 9 or 10. The major reasons given for their concern are listed in Table 5. The one food-related reasons indicated for concern was "more nutritional information needed", mentioned by 6 per cent of this group. Table 6 shows the cross-tabulation for age, education and life-cycle (number and ages of children), indicating that younger respondents, those with above average education and those with young children were more concerned than other groups about the need for additional information about nutrition.

(Tables 5 and 6)

3.2 Inflation

Almost 60 per cent of all respondents scored the issue "inflation" at either 9 or 10. Major reasons cited are presented in Table 7.

(Table 7)

The major reasons given as to why inflation was of major concern were: a) high cost of living and rising prices; and b) that wages were low or were not rising to compensate for this. However, almost 20 per cent of respondents in this group gave as the reason the high cost of food.

Table 8 presents the cross-tabulation by region for respondents who scored inflation at 9 or 10, showing the percentage specifically identifying the high cost of food as a reason for their concern. On a regional basis, the high cost of food was of greater concern to respondents in Quebec and the Maritimes relative to those in Ontario, the Prairies and British Columbia.

(Table 8)

3.3 Waste

About one-third of all respondents scored the issue "waste" at either 9 or 10. Major reasons for their high degree of concern are shown in Table 9. "Too much waste of food" received the second highest percentage of responses, being noted by 23 per cent of the subsample. Cross tabulation, not presented here in tabular form, indicated that older respondents typically were more concerned about food waste than were other groups. Food waste was specified by 30 per cent of all respondents in this subgroup who were age 65 and over, and by 16 per cent of those under age 35.

(Table 9)

Table 5 Reasons given Why Health and Health Care was of Major Concern

Reason	Percentage of Responses
Simply need better health care	20
Lack of doctors or poor availability of doctors	10
Lack of hospitals or limited availability of hospital space	8
Need better hospital care	8
High cost of health care	7
Poor doctors	7
More research needed	6
More nutritional information required	6

Table 6 Respondents Calling for More Nutritional Information Cross-Tabulated by Age, Education and Family Life Cycle Categories

Response	Percentage of Variable Category						Percentage of Total Sample
	Age						
	18-24	25-34	35-44	45-54	55-64	65+	All Categories
More Nutritional Information Required	8.1	7.7	4.1	4.5	3.4	---	5.5

	Education					
	Public School Some	Public School Completed	High School Some	High School Completed	Univeristy Some	Univeristy Completed
More Nutritional Information Required	2.3	0.8	7.6	6.5	5.6	5.0

	Life-Cycle		
	Married, Under 45 years old, with children under 6	Married, Under 45 years old, with children over 6	Average of All Other Categories
More Nutritional Information Required	9.7	7.6	2.7

Table 7 Reasons Given Why Inflation was of Major Concern

Reason	Percentage of Responses
High cost of living/rising prices	55
Difficult if on fixed incomes/wages too low/wages not rising	24
High cost of food	18
High cost of clothing	6
High cost of utilities/fuel	5
High cost of housing	4

Table 8 Respondents Stipulating the High Cost of Food as the Reason For Their Concern About Inflation Cross-Tabulated by Region

	Percentage of Each Variable Category					
	Region					
Reason	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
High Cost of Food	21.0	25.5	13.7	15.0	11.6	17.7

Table 9 Reasons Given Why Waste was of Major Concern

Reason	Percentage of Responses
Too much waste in general	37
Too much waste of food	23
Not enough recycling	10
Energy and natural resources wasted	10
Too much waste/spending by government	8
Cause pollution	7
Wasteful packaging	6
Causes garbage and littering	6

3.4 Food

Almost half of all respondents scored the issue "food" at either 9 or 10. These respondents were asked to specify, on an unpromted basis, the reasons for the concern about food. Table 10 lists the major reasons and percentage of the subsample giving these reasons. Almost two-thirds identified too high or rising food prices as the reasons for their concern about food. Food quality, additives and food processing generally were each mentioned by 15 per cent; nutritional value and too many convenience foods were also identified by a significant percentage of respondents.

(Table 10)

Table 11 provides regional cross-tabulations for those respondents specifying high or rising prices, food quality and additives in food as the major reasons for their high concern about food, as well as cross-tabulations by age for those concerned about food quality, and by income for those concerned about additives. Three-quarters of respondents in the Maritimes who had rated concern about food at 9 or 10 specified high or rising prices as the major reason for their concern, while less than half of Quebec respondents did so. Concern about food quality was highest among Quebec respondents and lowest in the Prairie and Maritime regions. Younger respondents and women working outside the home (not indicated in the table) expressed more concern than others about food quality. Food additives and food processing were of much greater concern in British Columbia and Quebec than in the Maritimes, and of greater concern to higher than to lower income groups. Another significant difference, not shown in the summary tables, was that concern about convenience foods and the nutritional value of all foods was more strongly held by respondents having post-high school education.

(Table 11)

Respondents who scored the subject "food" at 8 or less (a little over 50 per cent of the total sample) were also asked to specify their major concerns about food. Their responses have been differentiated from those above because of their lower overall level of concern about this subject. Major reasons provided by respondents from this "lower food concern group" were essentially the same as those identified in the "higher food concern group". That is, the reasons for concern in order of frequency of mention, were: prices too high/rising, additives

Table 10 Reasons Given Why Food was of Major Concern

Reason	Percentage of Responses
Prices are too high/are rising	64
Food quality	15
Additives in food and food processing generally	15
Nutritional value	8
Too many convenience foods	6

Table 11 Reasons Stipulated for Food Being of Major Concern Cross-Tabulated with Selected Classification Variables

	Percentage of Each Variable Category — Classification Variable					Percentage of Total Sample
	Region					
Reason	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
Prices are too high/rising	74.5	44.3	69.2	71.8	59.4	63.7
Food Quality	9.9	27.9	11.6	9.2	12.5	14.7

	Age						
	18-24	25-34	35-44	45-54	55-65	65+	All Categories
Food Quality	20.0	19.8	15.2	7.5	13.1	7.8	14.7

	Region					
	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
Additives in Food	4.3	18.0	13.7	13.7	21.9	14.5

	Income				
	$10,000	$10,000-14,999	$15,000-19,999	$20,000 +	All Categories
Additives in Food	10.9	12.6	20.2	19.3	14.5

in food and food processing generally, food quality, nutritional value, packaging, lack of fresh produce/freshness. Not surprisingly, a higher percentage of respondents in this group indicated that they had no current concerns about food.

Respondents in this group again reinforced the importance to consumers of both the absolute level of food prices generally and unexpected movements in specific food prices. Concerns about additives and the nutritional value of foods corroborated the importance of these issues to consumers that had been manifested in the focus group discussions.

4. Level of Concern about Food Issues - Prompted Responses

All respondents were read a list of phrases representing concerns about food and the food industry that had been identified as important to consumers in the two focus group discussions. Respondents were asked to score each issue from 10 (very concerned) to 1 (not very concerned). The results are presented in summary form in Table 12.

(Table 12)

Once again, it is acknowledged that the distribution of the scores into a specific number of categories is somewhat arbitrary. However, such categorization does provide a simple and extremely useful proxy measure of the degree and range of concerns that consumers have for selected issues on food and the food industry.

Tne food issues were scored at 8 or above (indicating a relatively very high level of concern) by more than 40 per cent of all respondents. Price-related issues dominated these concerns. The price-related issues were: the absolute price level (scored at 8 or more by 84 per cent of respondents), week-to-week variations in price (73 per cent), and interstore variations in price (58 per cent). Almost three-quarters of all respondents rated the nutritional value of food as being relatively of very high concern.

5. The Top Three Consumer Concerns about Food and the Food Industry

After completion of the "level of concern" scales described in the previous section, respondents were asked to delineate their

Table 12 Level of Concern of Consumers About Pre-Selected Food Issues

Issue	Mean Score	Percentage of Respondents Scoring Issues At: 10	8 or More	Between 7 and 4	Less than 3	1
1. The Price of Food	8.9	58.3	84.2	12.9	2.1	1.1
2. Nutritional Value of Food	8.2	39.7	73.8	19.8	5.0	2.2
3. Variation in the Price of Food From Week-to-Week	8.2	43.5	73.0	20.5	4.9	1.8
4. The Dating of Food Products	8.0	41.3	68.8	21.8	8.2	3.6
5. Additives in our Food	7.9	40.6	67.8	21.7	8.6	3.4
6. Information on the Labels	7.5	33.3	60.9	27.1	10.4	4.4
7. Variations in the Price of Food From Store-to-Store	7.5	30.8	57.9	27.5	10.7	4.1
8. Food Processors	6.9	20.2	44.7	36.3	11.6	5.5
9. Metric Measurements	6.2	26.3	44.3	27.7	25.4	12.6
10. Retailers Treatment of Consumers	6.7	19.8	43.9	37.8	14.7	5.6
11. Weekly Specials	6.3	16.7	39.2	40.0	18.3	6.7
12. The Packaging of Food	6.1	14.9	37.2	39.2	20.7	8.1
13. Convenience of Shopping	6.0	14.4	35.4	40.9	21.0	8.9
14. Supermarket Line-ups	6.0	18.8	35.4	36.9	24.9	9.7
15. Bilingual Labelling	5.5	18.4	33.8	29.7	33.4	14.7
16. The Advertising of Food	5.9	14.9	33.7	42.2	21.5	8.0
17. The Sizes the Food Products Come In	5.5	9.9	28.8	40.5	27.3	10.1
18. Convenience Foods	5.3	12.1	28.8	35.9	30.8	14.1
19. Money off Coupons	5.3	13.4	28.3	37.1	31.4	15.1
20. Competition Between Supermarkets	5.6	11.6	27.9	41.1	26.8	11.3

first, second and third greatest concern about food, and to provide reasons for their concern. It should be noted that this stage of the interview followed not only inquiries into respondents concerns about food on an unprompted basis, but also scoring of their concern about 20 pre-selected food issues. Therefore. responses to this question must be considered as prompted to some degree.

Table 13 lists the five issues identified as being of greatest concern by more than 5 per cent of the total sample. Differences in emphasis of concern for selected classification variables are presented in Tables 14, 15, and 16.

(Tables 13 and 14)

Three of the most frequently mentioned "greatest concerns" about food related to some aspect of price. Maritime respondents were particularly concerned about food prices either being too high or rising too quickly, while Quebec respondents were relatively less concerned than others. This issue was also of greater concern to respondents aged 45 and above, those in families where the head of the household was not employed in a "professional" capacity, and respondents either living alone or in families of five or more. The latter reflects the greater concern about rising food prices of respondents either on fixed incomes or with an above average number of children in the family.

(Tables 15 and 16)

Concern about additives in foods was at a relatively high level in British Columbia and a relatively low level in the Maritimes and Quebec. Typically, respondents with higher incomes and/or greater educational background were the most concerned about the issues of food additives and the need for more nutritional value in food. Concern about poor food quality was particularly marked in Quebec but much less of a concern in the Prairies. Finally, week-to-week price variations for food products was less of an issue in British Columbia than in other provinces and regions.

Summation of the responses to questions requesting information on the first, second and third greatest concerns about food is presented in in Table 17. To a very large extent, as would be expected, these responses reflect the ordering of concerns shown in Table 13.

(Table 17)

Table 13 Greatest Concern About Food and the Food Industry

Issue	Percentage of Respondents Expressing Greatest Concern About an Issue*
Prices are too high and/or are rising too quickly	33.1
Too many harmful additives in food/food chemicals are dangerous	13.1
Need more nutritional value in foods/need healthy products	12.9
Poor food quality	6.7
Too many price increases from week to week	5.5

* Based on respondents who have concerns about food, that is, 99 + per cent of all respondents.

Table 14 Concern About Prices Rising Too Quickly/Prices Being Too High Cross-Tabulated with Selected Classification Variables

Percentage of each variable category

Issue	Classification Variable: Region — Maritimes	Quebec	Ontario	Prairies	British Columbia	Percentage of Total Sample: All Categories
Prices too high/rising too quickly	47.5	24.8	35.4	32.6	34.0	33.1

Age	18-24	25-34	35-44	45-54	55-64	65 +
	28.9	32.4	29.7	36.9	37.8	35.8

Occupation of Head of Household	Professional/ Executive	Teacher/ Other Prof.	Middle Management	Clerical	All Other
	23.4	28.1	34.4	30.8	35.5

Family Size	1	2	3	4	5-6	7-8
	41.2	34.0	27.7	27.4	40.6	42.0

Table 15 Concern About Additives in Food Products Cross-Tabulated with Selected Classification Variables

Percentage of each variuable category

	Classification Variable					Percentage of Total Sample
	Region					
	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
Concern About Food Additives	6.9	9.9	13.6	14.8	21.8	13.1

	Income			
	$10,000	$10,000-14,999	$15,000-19,999	$20,000 +
	8.9	13.3	15.1	16.7

Table 16 Concern About Food Quality and Week-To-Week Price Variations Cross-Tabulated with Region

Percentage of each variable category

	Classification Variable					
	Region					
	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
Food Quality	6.2	11.8	5.6	3.0	4.6	6.7
Week-to-week Price Variations	6.2	5.3	6.6	5.6	1.1	5.5

Table 17 Summation of Three Greatest Concerns About Food and the Food Industry

Issue	Percentage of Respondents Expressing Concerns*
Prices are too high and/or are rising too quickly	52.6
Too many harmful additives in food/food chemicals are dangerous	28.6
Need more nutritional value in foods/need health products	24.7
Poor food quality	14.3
Food freshness/food is not fresh	11.1
Too many price increases from week to week	9.9
Dating of food products ensures freshness	8.4
Wasteful packaging	6.9
Too many price variations from store to store	6.7
Need more information on labels	6.4
Don't understand metric measurement	4.9
Packaging doesn't protect food/ doesn't keep it fresh	4.8

* Based on respondents who have concerns about food, that is, 99 + per cent of all respondents.

The critical words that express many consumers' greatest concerns about food would seem to be:

- prices (absolute level, week-to-week and store-to-store variations)
- nutritional value
- food additives
- food quality
- food freshness
- packaging
- metric measurement

6. Consumer Concerns about Participants in the Food Production and Marketing Chain

Respondents were asked to indicate which members of the food chain they were most concerned about and to specify why. A list was read to them identifying farmers' marketing boards, food manufacturers and processors, food wholesalers and food retailers as the major participants. The summary results are presented in Tables 18 to 22.

(Tables 18 to 22)

British Columbia respondents were more concerned about marketing boards than respondents in other provinces and regions. Middle-age respondents expressed a similar high degree of concern. Farmers were a concern to respondents living in rural areas. In Quebec, the emphasis was on the food wholesaler. Typically, relatively younger respondents and those with a higher family income and/or more education were more concerned about food processors and retailers than other respondent groups.

The reasons given for being concerned about farmers were generally positive. For example, responses included:

- Farmers are not paid enough.
- They don't get a fair deal.
- Farmers have to work hard.
- Farmers produce the food.
- Farmers need help to survive.

Table 18 Participants in the Food Chain which Generated Greatest Degree of Concern

Food Chain Participant	Percentage of Sample Most Concerned About Specific Participant
Farmers	25.4
Food Retailers	20.4
Food Manufacturers and Processors	19.2
Marketing Boards	9.5
Food Wholesalers	7.4
Don't Know	17.6

Table 19 Respondents Concerned About Farmers Cross-Tabulated with Population of Area Surveyed

	Percentage of each variable category		
	Classification Variable		Percentage of Total Sample
	Population of Area Surveyed		
Issue	Under 1,000	1,000 or more	All Categories
Farmers	32.4	25.2	25.4

Table 20 Respondents Concerned About Marketing Boards Cross-Tabulated with Region and Age

	Percentage of each variable category					
	Classification Variable					Percentage of Total Sample
Issue	Region					
	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
Marketing Boards	10.5	6.5	7.9	12.1	15.4	9.5

	Age						
	18-24	25-34	35-44	45-54	55-65	65 +	All Categories
	5.4	7.2	11.7	13.3	13.4	4.0	9.5

Table 21 Respondents Concern About Food Wholesalers Cross-Tabulated with Region

Percentage of each variable category

	Classification Variable: Region					Percentage of Total Sample
	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
Food Wholesalers	5.9	10.8	7.3	4.6	5.3	7.4

Table 22 Respondents Concern About Food Processors and Food Retailers Cross-Tabulated with Age and Income

Percentage of each variable category

Issue	Classification Variable: Age						Percentage of Total Sample
	18-24	25-34	35-44	45-54	55-64	65 +	All Categories
Food Processors	23.9	22.2	20.9	17.9	13.7	7.4	19.2
Food Retailers	23.4	22.6	17.0	18.7	23.5	16.2	20.4

	Income				
	$10,000	$10,000-14,999	$15,000-19,000	$20,000 +	All Categories
Food Processors	16.3	19.0	22.7	23.7	19.2
Food Retailers	20.3	20.7	19.1	25.1	20.4

Typically and not surprisingly, this positive support came from respondents in rural areas and from older respondents.

Marketing boards were a concern to some respondents because:

They have too much control.

They are responsible for high prices.

and, conversely:

They are unfair to farmers.

Concerns about food manufacturers and processors generally were negative and included such comments as:

They control the quality of foods.

They use too many additives.

They are not clean/sanitary.

They make the most profit.

They determine the prices.

They need more inspection.

They spend too much on packaging.

The majority of respondents who identified wholesalers as being of greatest concern did so because:

Wholesalers control the prices.

Wholesalers make too much profit.

Similar comments to those about wholesalers were made about retailers.

In summary, participants in the food chain beyond the farm gate had a negative image with many of the respondents. Farmers, on the other hand, provoked positive concerns although this was largely explained by the rural community supporting its own. The negative image of the processing, distribution and retailing sectors was most clearly and strongly expressed by younger, more affluent consumers.

7. Food Shopping Behaviour and Experiences

Respondents were asked where they did their main grocery shopping. About 60 per cent patronized one store only, 23 per cent switched from store to store, and the remainder were loyal to one store on occasion and shopped around on other occasions. British Columbia respondents seemed to exhibit the least degree of one-store loyalty relative to other provinces and regions.

(Table 23)

The most popular reason given to in explaining a respondents shopping behaviour was convenience (40 per cent of all respondents), followed by price-related features -- good prices, low prices and the best specials.

(Table 24)

About 20 per cent of all respondents had encountered a bad experience while shopping at their regular supermarket. Relative frequency of such occurences was almost twice as high in Quebec as in the Maritimes. Younger respondents in particular indicated a relatively high incidence of bad shopping experiences compared to other demographic groups.

(Table 25)

The most frequently mentioned circumstances of a bad experience were stale or damaged food, rude stafff and slow service or long line-ups. Action taken in response to such bad experiences, typically, were one of the following: didn't do anything, walked out, returned the item and/or got money back, spoke to the manager and/or staff.

In order to monitor consumer reaction and/or acceptance of a computer assisted check-out system, respondents were asked to indicate if they were familiar with the Universal Product Code (UPC). In this study, only 15 per cent indicated any familiarity with the UPC.

8. What Should Government Do About Consumer Food Concerns?

Almost 30 per cent of respondents thought that government should "control inflation and/or lower prices," while 11 per cent thought that nothing could be, will be or should be done. In relative terms, Maritime respondents were more convinced than those in other regions that the government should control inflation/lower food prices. Quebec respondents called for more food inspectors and closer inspection for quality and freshness. In the Prairies and in British Columbia, respondents were relatively more enthusiastic in favoring government control over participants in the food chain (that is, the middlemen). However, almost 30 per cent of all respondents could not provide a response to the question, "What can government do?"

Table 23 Consumer Shopping Behaviour Cross-Tabulated with Region

	Percentage of each variable category					
	Classification Variable					Percentage of Total Sample
	Region					
	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
Change from store-to-store	27.2	19.4	24.2	20.6	24.6	22.6
One store only	62.6	64.6	57.9	64.7	55.1	61.1
It varies	10.2	15.1	17.9	13.7	19.6	15.8

Table 24 Reasons Given to Explain Shopping Behaviour

Reason	Percentage of Total Respondents Giving Specific Reason
For convenience/saves time and mileage	40.4
Good prices	11.6
For the lowest prices	10.3
For the specials	10.2
Satisfied/good store	7.6
Know the layout of the store	6.1
Good Service	5.8
Only store in the area	4.5

Table 25 Incidence of Encountering a Bad Experience in the Supermarket Cross-Tabulated with Region and Age

Issue	Percentage of each variable category					Percentage of Total Sample
	Region					
	Maritimes	Quebec	Ontario	Prairies	British Columbia	All Categories
Bad Experience in a Supermarket	12.8	23.4	20.5	20.9	16.5	20.2
	Age					
	18-24	25-34	35-44	45-54	55-64	65 +
	27.4	24.6	18.5	18.4	14.5	11.4

Table 26 Responses to the Question "What Should Government Do About Consumer Food Concerns?"

Category of Response	Percentage of Total Sample
Control inflation/lower the prices	28.6
More inspectors/closer inspection for quality, freshness	11.5
Nothing can be/will be/should be done	10.9
More control/research on food processing, additives and nutrition	8.2
Should improve the situation/do something	6.6
More control of participants/middlemen	4.3
More consumer information/Education/Awareness	2.9
Don't Know	28.2

PART IV

CONCLUSIONS

This study was aimed at exploring the range and depth of consumer concerns about food. The findings suggest some of the areas that the food industry and governments should examine in considering future business practices and food policies.

One clear conclusion is that concern about food and the food industry is not right at the top of most consumers' hierarchy of concerns. In the group discussions, consumers seemed far more concerned about issues such as health care, education, housing, waste and pollution, the economy generally, unemployment, today's youth and their future, than about food. In administering the questionnaire, when respondents were asked to specify, without prompting, the subjects or issues that concerned them most in Canada today, those which predominated were: unemployment, national unity, inflation, the high cost of living, education, the economy generally. When respondents were asked to rate a series of pre-selected issues, the concerns which rated highest were inflation, unemployment and education.

It was clear, however, that the perceived high and rising price of food, in association with such general concerns as inflation, high and rising prices generally, and the high cost of living, serves to create an aggregated concern, largely focussed on price issues, that is the major composite concern of most consumers. The two issues of absolute level of food prices and fluctuations in specific food prices were the major specific food-related concerns noted in the survey, although many consumers also expressed strong concern about food additives and the nutritional value of food.

Consumer attitudes towards participants in the food production and marketing chain beyond the farm gate were clearly negative. Food processors, distributors and retailers shoudl address themselves seriously to this problem if they are to improve their credibility with respect to their business motives and activities.

It should be noted that younger and more affluent consumers were generally more concerned about food issues. Food retailers may also note that it was the younger shoppers who reported a relatively higher incidence of bad food shopping experiences.

Lack of consumer awareness of the Universal Product Code is another important finding for retailers. The potential for improving control of stock loss, reordering, shelf layout and employee scheduling are sound reasons for implementing a scanning system. But retail chains must build awareness of the advantages the system holds for the consumer, who is most concerned about its implications in terms of food prices. The UPC could be a crucial component for improving retailer credibility with the consumer.

It is evident that a large credibility gap exists between the consumer and the processing, distribution and retailing sectors of the food industry. These sectors are perceived by many consumers, particularly younger ones, as operating in a foggy, mysterious jungle. Often, consumers lay the blame for rising and fluctuating food prices firmly at the door of these sectors. Clearly, there is a role for both government and the food industry to play in clearing this jungle by providing consumers with the type of information they can use both to gain better understanding of the workings of the food industry and to make better food purchase decisions.

APPENDIX

CONSUMER SURVEY QUESTIONNAIRE

St. J., NFLD. 01	Hal. 11	St. J., N.B. 21	Mtl. 31	Q.C. 32	T.R. 33	Chic. 34	Tor. 41
Ott. 42	King. 43	Ham. 44	Lon. 45	Kit/Wat. 46	N.Bay 47	T.Bay 48	Sud. 51	Wpg. 61
Reg. 71	Sask. 72	Cal. 81	Edm. 82	Van. 91	Vic. 92			

STUDY #7106

	DATE	M A E	INT. #	O/S BUSY	N/A BUSY	N.Q. R.A.	REF.	
1				1	2	3	4	11
2				1	2	3	4	12
1				1	2	3	4	13
2				1	2	3	4	14
1				1	2	3	4	15
2				1	2	3	4	16
1				1	2	3	4	17
2				1	2	3	4	18

Good_____. I'm Ms._______________of Adcom Research Limited and we are doing a survey on the major concerns homemakers have in Canada today and would like to have your opinion.

(ASK TO SPEAK TO FEMALE HEAD OF HOUSEHOLD 18 YEARS OF AGE AND OVER)

Would you be so kind as to answer some questions for me?

A. *Since I have a quota to fill, please tell me what age group I could check you in?*

(READ LIST)

Under 18	(TERMINATE)		
18 - 24	(CONTINUE)	*1	19
25 - 34	(CONTINUE)	*2	
35 - 44	(CONTINUE)	*3	
45 - 54	(CONTINUE)	4	
55 - 64	(CONTINUE)	5	
65 and over	(CONTINUE)	6	

1. *In Canada today, there are a number of subjects that the public are very concerned about. Please tell me the subjects or issues that you yourself are concerned about.* (PROBE) *Are there any other subjects or issues that concern you?*

____ 20

____ 21

____ 22

Y # 7106

I am going to read you a list of subjects that some housewives have told us about and even though you may have mentioned them I would like you to tell me how concerned you are about each one using the scale from 1 to 10. The more concerned you are about the subject the higher the score you would give it, the less concerned about the subject the lower the score you would give it.
(ROTATE SUBJECT AND "X" FIRST ASKED)

How concerned are you about (READ SUBJECT)?

	VERY CONCERNED						NOT VERY CONCERNED				DK/Rf	
Health and Health Care	*10	*9	8	7	6	5	4	3	2	1	Y	23
Inflation	*10	*9	8	7	6	5	4	3	2	1	Y	24
Waste	*10	*9	8	7	6	5	4	3	2	1	Y	25
Food	*10	*9	8	7	6	5	4	3	2	1	Y	26
Status of Women	10	9	8	7	6	5	4	3	2	1	Y	27
Housing	10	9	8	7	6	5	4	3	2	1	Y	28
Senior Citizens	10	9	8	7	6	5	4	3	2	1	Y	29
Unemployment	10	9	8	7	6	5	4	3	2	1	Y	30
Education	10	9	8	7	6	5	4	3	2	1	Y	31
Crime	10	9	8	7	6	5	4	3	2	1	Y	32
Government Spending	10	9	8	7	6	5	4	3	2	1	Y	33
Pollution	10	9	8	7	6	5	4	3	2	1	Y	34
Energy	10	9	8	7	6	5	4	3	2	1	Y	35
National Unity	10	9	8	7	6	5	4	3	2	1	Y	36
Discrimination	10	9	8	7	6	5	4	3	2	1	Y	37
Taxes	10	9	8	7	6	5	4	3	2	1	Y	38
Today's children	10	9	8	7	6	5	4	3	2	1	Y	39

(PLEASE GO TO NEXT PAGE AND CONTINUE)

STUDY # 7106

3. (FOR EACH UNDERLINED SUBJECT THAT RESPONDENT GAVE A "9" OR 10*" TO AT Q.2, ASK:)
(OTHERWISE, SKIP TO Q.4)

What is the major problem or concern you have with (ANSWER IN Q.2)? (PROBE) *Anything else ?*

Health and Health Care 40 41

Inflation 42 43

Waste 44 45

Food 46 47

(IF A "9" OR 10*" TO FOOD AT Q.2, SKIP TO Q.5) (OTHERWISE, ASK:)

4. *Now, I would like to concentrate on your concerns about food. What are your overall concerns regarding food ?* (PROBE) *Anything else?*

(PLEASE TURN PAGE AND CONTINUE)

STUDY # 7105

5. *I am going to read you another list now about food concerns and even though you may have mentioned some of them, I would like you to tell me how concerned you are about each one, using the same scale from 1 to 10. The more concerned you are about it, the higher the score you would give it, the less concerned you are about it, the lower the score you would give it.*

(ROTATE CONCERNS AND "X" FIRST ASKED)

How concerned are you about (READ CONCERN)?

	Concern	Very Concerned									Not Very Concerned	DK/Ref	
☐	*Competition between supermarkets*	10	9	8	7	6	5	4	3	2	1	Y	50
☐	*The sizes the food products come in*	10	9	8	7	6	5	4	3	2	1	Y	51
☐	*Metric measurements*	10	9	8	7	6	5	4	3	2	1	Y	52
☐	*The packaging of food*	10	9	8	7	6	5	4	3	2	1	Y	53
☐	*Bilingual labelling*	10	9	8	7	6	5	4	3	2	1	Y	54
☐	*Nutritional value of food*	10	9	8	7	6	5	4	3	2	1	Y	55
☐	*Information on the labels*	10	9	8	7	6	5	4	3	2	1	Y	56
☐	*Additives in our food*	10	9	8	7	6	5	4	3	2	1	Y	57
☐	*The price of food*	10	9	8	7	6	5	4	3	2	1	Y	58
☐	*Variations in the price of food from week to week*	10	9	8	7	6	5	4	3	2	1	Y	59
☐	*Variations in the price of food from store to store*	10	9	8	7	6	5	4	3	2	1	Y	60
☐	*Supermarket line-ups*	10	9	8	7	6	5	4	3	2	1	Y	61
☐	*The advertising of food*	10	9	8	7	6	5	4	3	2	1	Y	62
☐	*Weekly specials*	10	9	8	7	6	5	4	3	2	1	Y	63
☐	*Money off coupons*	10	9	8	7	6	5	4	3	2	1	Y	64
☐	*The dating of food products*	10	9	8	7	6	5	4	3	2	1	Y	65
☐	*Food processors*	10	9	8	7	6	5	4	3	2	1	Y	66
☐	*Retailers treatment of consumers*	10	9	8	7	6	5	4	3	2	1	Y	67
☐	*Convenience of shopping*	10	9	8	7	6	5	4	3	2	1	Y	68
☐	*Convenience foods*	10	9	8	7	6	5	4	3	2	1	Y	69

(IF "DK" TO ALL AT Q.5, SKIP TO Q.9a) (OTHERWISE, ASK:)

6a. *Among your concerns about food, which one would you say concerns you the* most?
(ONE MENTION ONLY)

______________________________ 70

______________________________ 71

(IF "NONE/DK" AT Q.6a, SKIP TO Q.9a) (OTHERWISE, ASK:)

6b. *Why are you concerned about* (ANSWER IN Q. 6a)? (PROBE) *Anything else?*

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(PLEASE GO TO NEXT PAGE AND CONTINUE)

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Among your concerns about food, which one concerns you second ? (ONE MENTION ONLY) 11 12

(IF "NONE/DK" AT Q.7a, SKIP TO Q.9a) (OTHERWISE, ASK:)
. Why are you concerned about (ANSWER IN Q. 7a)? (PROBE) Anything else? 13 14

.. Among your concerns about food, which one concerns you third ? (ONE MENTION ONLY) 15 16

(IF "NONE/DK" AT Q.8a, SKIP TO Q.9a) (OTHERWISE, ASK:)
. Why are you concerned about (ANSWER IN Q. 8a)? (PROBE) Anything else? 17 18

9a. There are a number of participants involved to make food available to you. Which one of the following participants actions or activities concerns you most?	(READ LIST)		19
	Farmers	1	
	Marketing Boards	2	
	Food Manufacturers and Processors	3	
	Food Wholesalers	4	
	Food Retailers	5	
	(DK)	9	

9b. (IF "DK" AT Q. 9a, SKIP TO Q. 10)
(OTHERWISE, CONTINUE)
What is it that concerns you about the (ANSWER IN Q. 9a)? (PROBE)
Anything else? 20 21

10. Are you familiar at all with the universal product code?	Yes	1	22
	No	2	
	DK	9	
11a. When you do your main grocery shopping, do you usually go from store to store, or do you shop at one store only?	Store to store (CONTINUE)	1	23
	One store only (CONTINUE)	2	
	It varies (SKIP TO Q.12a)	3	
	DK	9	

11b. Why do you go from/shop at (ANSWER IN Q.11a) when you do your main grocery shopping? 24 25

(... TURN PAGE AND CONTINUE)

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12a. *Have you ever encountered a bad experience while shopping at your regular supermarket?*	Yes (CONTINUE)	1	25
	No (SKIP TO Q. 13)	2	

12b. *What were the circumstances*

______________________________ 27

______________________________ 28

12c. *What action did you take?*

______________________________ 29

______________________________ 30

13. *In your opinion, what do you think the government should do about these food concerns?* (PROBE) *Anything else?*

______________________________ 31

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14. (IF RESPONDENT IS UNDER 45*YEARS OF AGE AT Q.A, CONTINUE)
(OTHERWISE, SKIP TO Q.14b)

14a. *We are interested in obtaining a description of the basic characteristics or makeup of your family. I am going to read out to you some statements and I would like you to tell me which statement best describes your household.*

(ONE MENTION ONLY)

(READ LIST) — 34

- *Are you married with no children 18 years of age or younger living at home*	(SKIP TO Q.15)	1
- *Are you married with the youngest child under 6 years of age*	(SKIP TO Q.15)	2
- *Are you married with the youngest child 6 years of age or over*	(SKIP TO Q.15)	3
- *None of the above*	(SKIP TO Q.15)	4
- (Refused)	(SKIP TO Q.15)	9

14b. *We are interested in obtaining a description of the basic characteristics or makeup of your family. I am going to read out to you some statements and I would like you to tell me which statement best describes your household.*

(ONE MENTION ONLY)

(READ LIST) — 35

- *Are you married, with no children living at home with the head of household still working*	1
- *Are you married with no children living at home with the head of household retired*	2
- *Are you married with children living at home with the head of household still working*	3
- *Are you married with children living at home with the head of household retired*	4
- *None of the above*	5
- (Refused)	9

(PLEASE GO TO NEXT PAGE AND CONTINUE)

STUDY 7106

15. *What is the name of the community or area in which you live ?*	(WRITE IN) ______________________ ( )	36 37
16. *Which of the following would best describe your level of education?*	(READ LIST) *Some public school* 1 *Completed public school* 2 *Some high school* 3 *Completed high school* 4 *Some university* 5 *Completed university* 6 (Other) (SPECIFY) ______ ( ) (Refused) 9	38
17a. *Do you work outside the home at all?*	Yes (CONTINUE) 1 No (SKIP TO Q.17d) 2 Refused (SKIP TO Q.17d) 9	39
17b. *Would that be part-time or full-time?*	Part-time 1 Full-time 2 Refused 9	40
17c. *What is your occupation? And type of company?* *What was your previous occupation? And type of company?*	Occupation ______________________ ( ) Type of company ______ Refused 99	41 42
17d. (IF RESPONDENT IS HEAD OF HOUSEHOLD, "X" THE BOX) (IF NOT, ASK:) *What is the occupation of the head of household? And type of company?* (IF RETIRED OR UNEMPLOYED, "X" THE BOX AND ASK:) *What was their previous occupation? And type of company?*	Respondent is head of household ☐ Occupation ______________________ ( ) Retired ☐ Unemployed ☐ Type of company ______ Refused 99	43 44

18. *How many people, including yourself, are there in your home in the following age brackets?*

(READ LIST)

Under 6	0	1	2	3	4	5	6+	45
6 - 12	0	1	2	3	4	5	6+	46
13 - 19	0	1	2	3	4	5	6+	47
20 and over including yourself	0	1	2	3	4	5	6+	48
(Refused)							9	

19a. *Do you speak both French and English?*	Yes 1 No 2 Refused 9	49
9b. *Are you:*	(READ LIST) *Single* 1 *Married* 2 *Divorced/Seperated* 3 *Widowed* 4 (Refused) 9	50

STUDY # 7106

20a. *Finally, into which of the following income groups does your family's total annual income fall? Is it:*	(READ LIST)		
	Under $10,000	(CONFIRM NAME, ETC.)	1
	$10.000 or over	(CONTINUE)	☐
	(Refused)	(CONFIRM NAME, ETC)	9
20b. *Is it under $15,000?*	Yes	(CONFIRM NAME, ETC.)	2
	No	(CONTINUE)	☐
	Refused	(CONFIRM NAME, ETC.)	9
20c. *Is it under $20,000?*	Yes	(CONFIRM NAME, ETC.)	3
	No	(CONFIRM NAME, ETC.)	4
	Refused	(CONFIRM NAME, ETC.)	9

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(PLEASE RETURN TO TOP OF FIRST PAGE AND CONFIRM NAME, PHONE #, ETC.)