

# Consumer attitudes and Ethics

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## A report of work from the Better Organic Business Links (BOBL) project

**January 2011**

Organic Centre Wales



Canolfan Organig Cymru  
Organic Centre Wales

# Aim: Strategic development of the organic sector in Wales

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- Organic businesses met and agreed priorities:
  - To improve the performance of the supply chain – to better meet consumer expectations
  - To communicate and educate



# Five main areas of activity

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1. Innovation
2. Consumer information and image development
3. Developing markets
4. Infrastructure for improvement
5. Structural issues



# 1. Innovation

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- 1.1 Environmental performance analysis
- 1.4 Fair/ethical/co-operative models

# 4. Infrastructure for improvement

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- 4.4 Understanding consumer demands
  - Look at existing information
  - Kantar worldpanel data on purchasing behaviours
  - Examine results, agree on areas needing investigation



# The survey.....

- 10 minute telephone survey
- Representative sample of those responsible for grocery shopping in household
- 700 in Wales, 700 England /Scotland
- Collecting information on attitudes towards organic produce, purchasing patterns and motivations and barriers



# Purchasing patterns

## Sectors

- Fresh fruit and veg
- Eggs
- Milk and other dairy products
- Pork / chicken / bacon
- Flour, cereals and bakery products
- Chilled convenience foods
- Alcoholic drinks
- Soft drinks
- Food products for children 3+
- Beef
- Lamb
- Clothes and others textiles
- Beauty and personal care products

## Purchasing frequency

- **Always / mostly** buy organic
- **Occasionally** buy organic
- **Never** buy organic
- Do **not** buy in category

# Key Finding 1: Purchasing Behaviour

## 1. It's not a case of 'THEM' and 'US'

Buy organic AT ALL  
(ANY sector)



# Key Finding 1: Purchasing Behaviour

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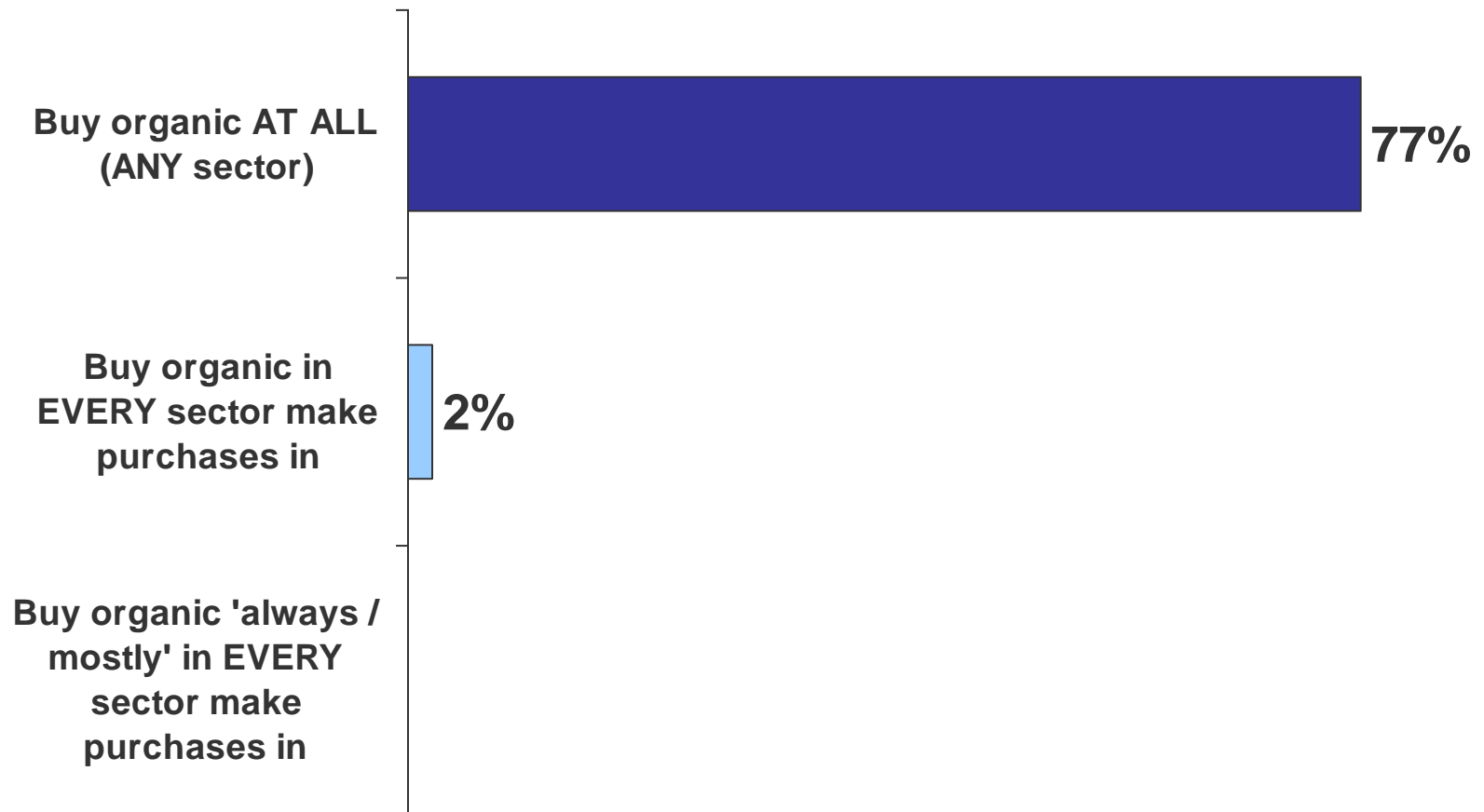
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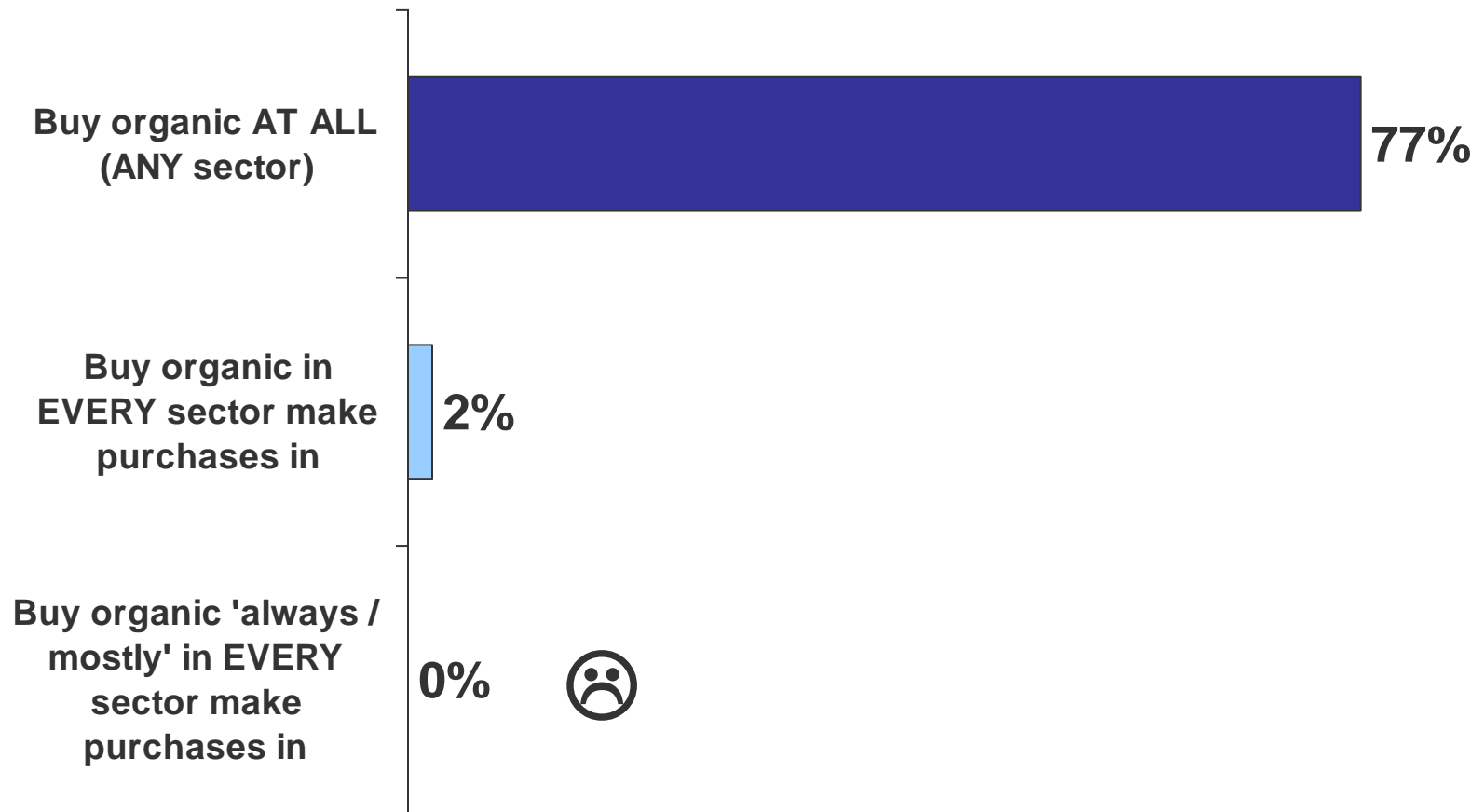
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# Key Finding 2: Spontaneous Associations

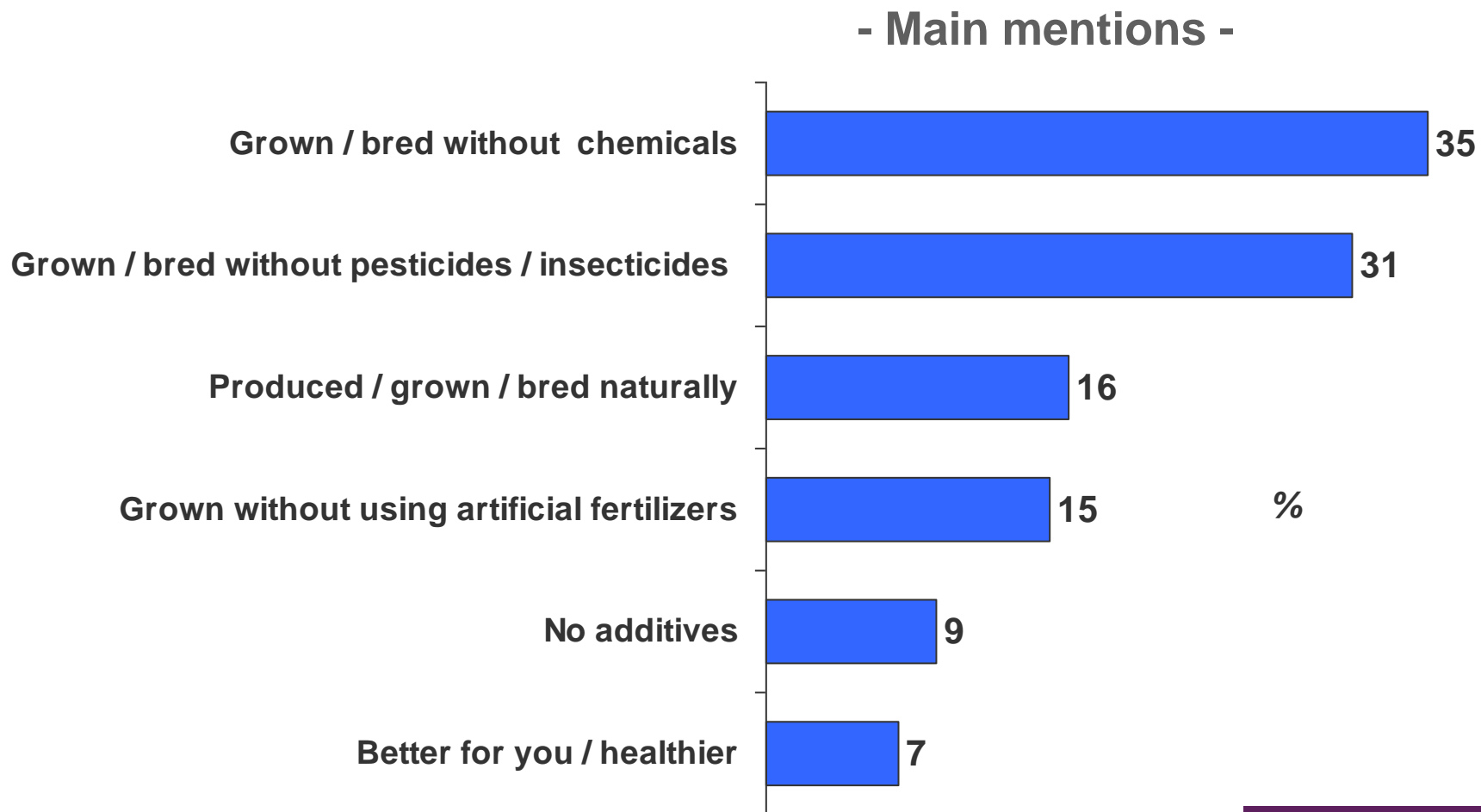
## 2. 'Free from' is key spontaneous association

*Base: All grocery shoppers (Wales – 704)*

*Question: When a product is organic, can you tell me what you think organic means or represents?*

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Base: All grocery shoppers (Wales – 704)

Question: When a product is organic, can you tell me what you think organic means or represents?

# Key Finding 3: Motivations

## 3. Motivations to purchase are varied

%

*Base: All who ever buy organic produce (Wales – 551)*

*Question: What are the main reasons that you choose to buy organic products?*

# Key Finding 3: Motivations

## 3. Motivations to purchase are varied

- Main mentions -



%

Base: All who ever buy organic produce (Wales – 551)

Question: What are the main reasons that you choose to buy organic products?



# Key Finding 4: Barriers

## 4. Stated barriers to purchase / increased purchase revolve around PRICE

Main reasons NOT buy in future	
▪ Expensive / overpriced	56%
▪ Never thought about it	8%
▪ Would buy if cheaper	7%
▪ Stick to what I know	6%
▪ Can't tell difference	5%
▪ No better for you than non-organic	4%

Main reasons to buy SAME AMOUNT in future	
▪ Expensive / overpriced	23%
▪ Stick to what I know	14%
▪ Will buy if on offer / right price	12%
▪ Depends on what available	6%
▪ Would buy more if cheaper	5%
▪ Already buy enough	4%

Base: All non organic buyers who are unlikely to buy in future (Wales -133)

Base: All organic buyers who say they will buy same amount of organic produce in future (Wales -133)

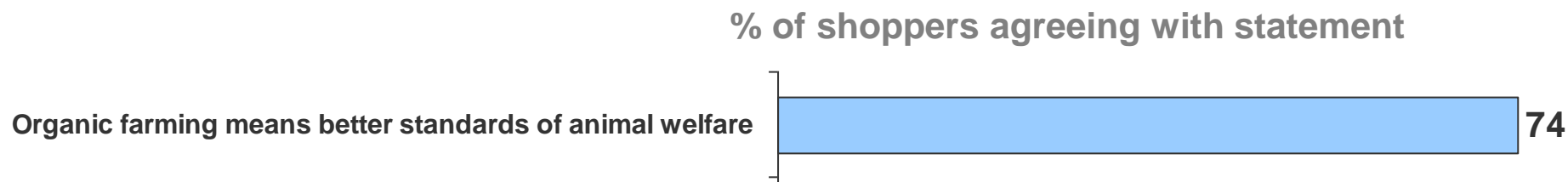
## Key Finding 5: Attitudes to benefits

**5. A majority of all shoppers are accepting of some benefits.....**

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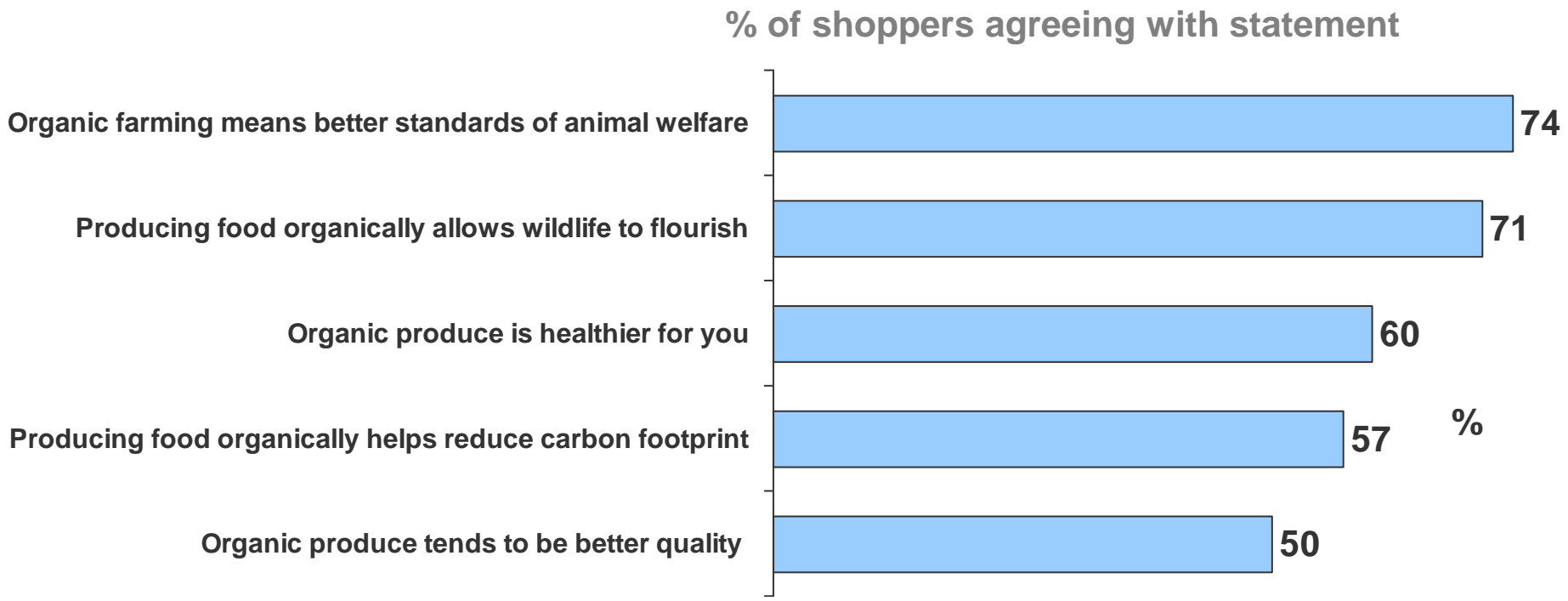
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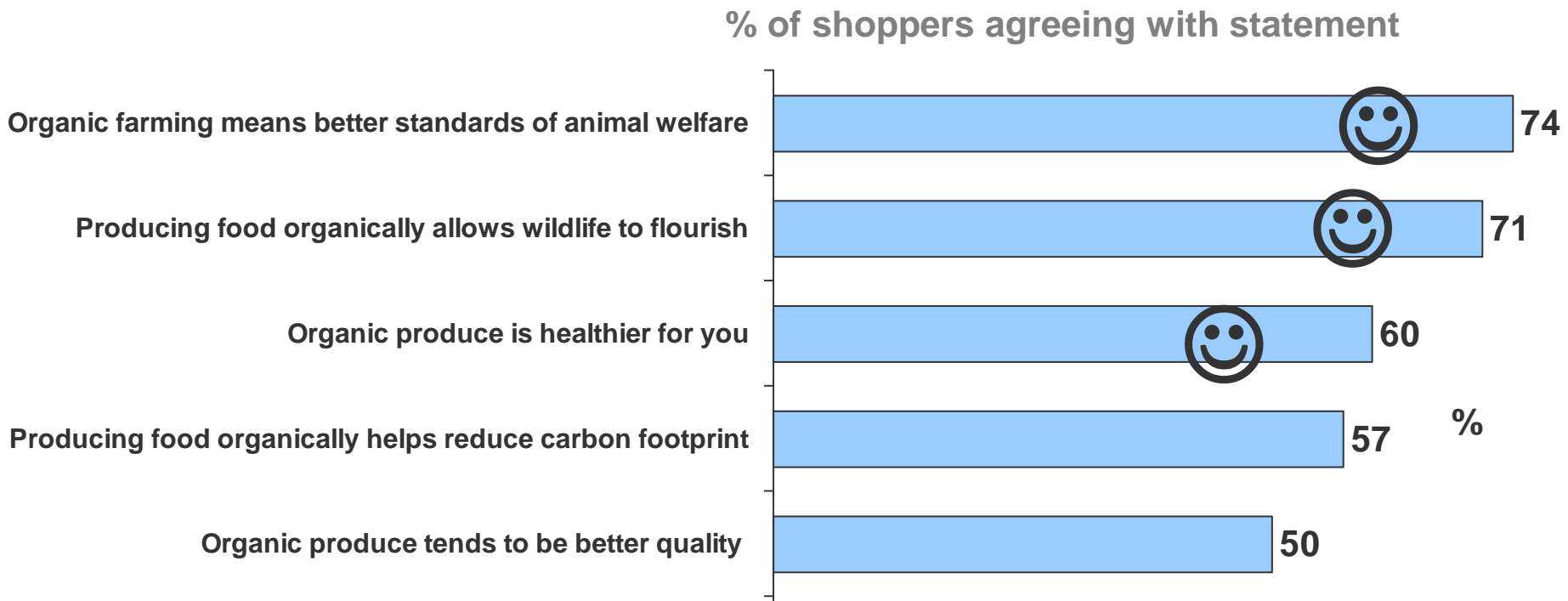
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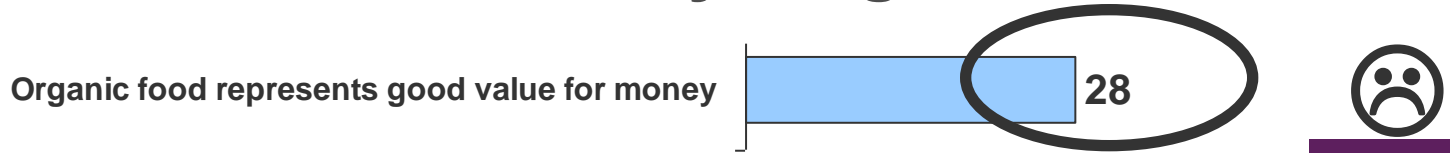
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Question: I would like you to tell me how much you agree or disagree with each statement?

# Key Finding 5: Attitudes to benefits

## 5. A majority of all shoppers are accepting of some benefits.....



.....but doesn't always = good value



Base: All principal grocery shoppers (Wales – 704)  
Question: I would like you to tell me how much you agree or disagree with each statement?

## Key Finding 6: Provenance

### 6. Provenance / country of origin is important to consumers

*Base: All principal grocery shoppers (Wales – 704)*

*Question: If you were choosing between two similar products and one was organic and the other was locally produced, which would you choose or would it make no difference?*

# Key Finding 6: Provenance

## 6. Provenance / country of origin is important to consumers

I much more interested in where produce has come from than whether its organic or not

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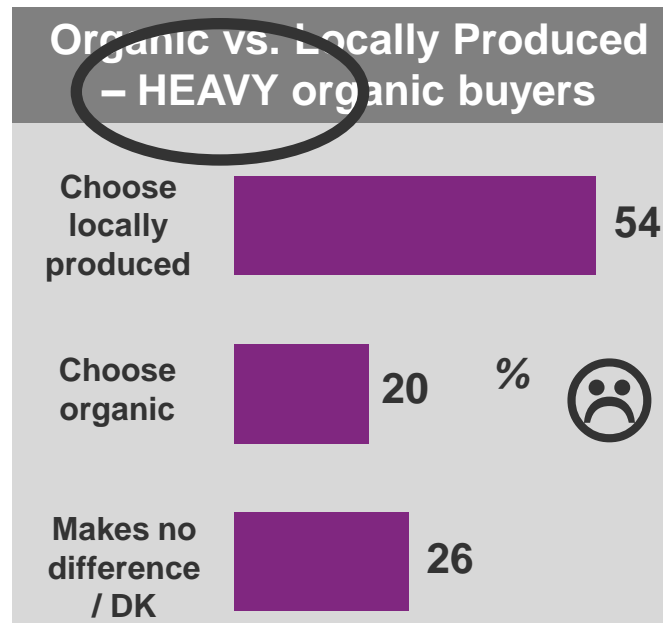
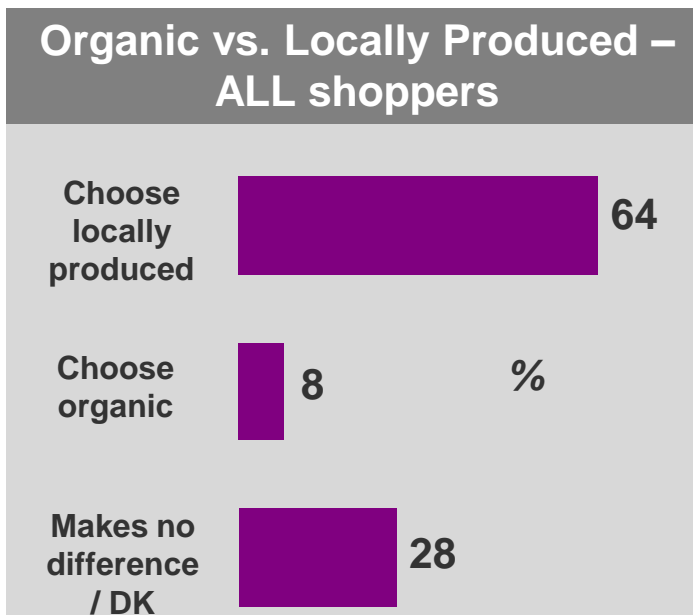


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# Attitudes towards Organic Produce

## Environmental benefits

- Producing food organically **helps reduce our carbon footprint**
- Producing food organically **helps wildlife** to flourish

## Other benefits

- Organic produce is **healthier** for you
- Organic farming means better standards of **animal welfare**
- Organic produce tends to be **better quality**
- I just **don't see any benefits** to organic produce
- I **don't really know enough** about organic produce to justify paying for it
- For British **beef and lamb** I **don't see much difference between organic and non-organic**

## Cooking

- I regularly cook meals from scratch

## Price

- Organic food represents **good value for money**
- I **regularly compare the price** of organic and non-organic produce
- Putting an organic label on is **just an excuse to charge more**

## Provenance

- I'm much **more interested in where something has come from** than whether its organic or not
- I'd be **more likely to buy organic** if I knew it came from **Wales**
- I'd be **more likely to buy organic** if I knew it came from **Britain**

## Food Production

- I'm **not** really that **concerned** about **pesticides/fertilisers** used by farmers
- I **don't** particularly **try to avoid GM** products
- It **doesn't bother me** if the food I eat contains **additives and e-numbers**

# Support for Ethical business

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- Working with the Food Ethics Council
- Workshops for businesses in Wales
  - Five myths about business ethics
  - Playing the choice card
  - The transparency test
  - Know your stakeholders
  - Making decisions ethically

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# Support for Ethical businesses

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- Bilingual ethical trading handbook
- Focus on business benefits, provide support for analysis
- Opportunities for 10 businesses to have one to one mentoring

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# Why *not* certification?

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- We are focusing on win-wins
- Bureaucracy is a disincentive
- We will inform businesses about certification options
- The process of analysis is useful, which may lead to improved business decisions and behaviour - demonstrating this and gaining market recognition are separate issues



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# Acknowledgement:

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Rural Areas



Llywodraeth Cynulliad Cymru  
Welsh Assembly Government



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