CONSUMER PRIORITIES FOR SUSTAINABLE DEVELOPMENT

10 June 2008

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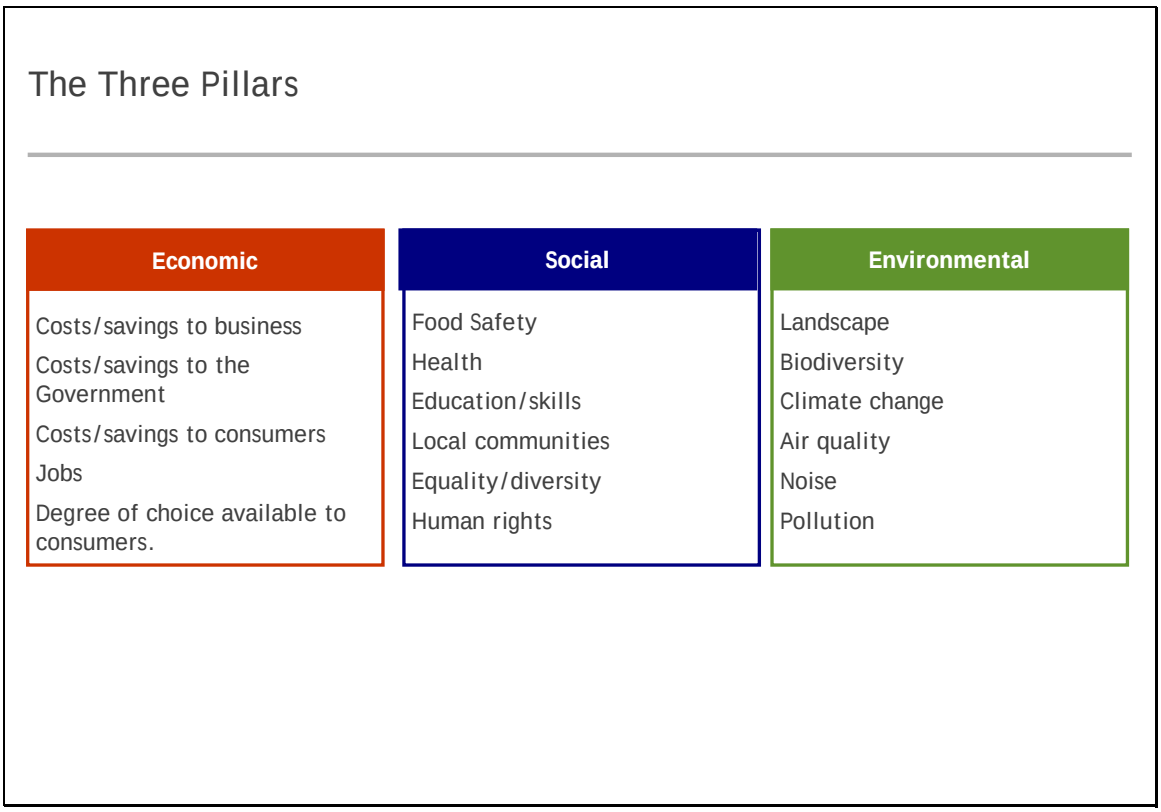
1 Background and Objectives

a) Background

The goal of *sustainable development is to enable all people throughout the world to satisfy their basic needs and to enjoy a better quality of life, without compromising the quality of life of future generations. It is about achieving economic, social and environmental objectives at the same time. These are known as the three "pillars" of sustainable development. Chart 1.1 below shows the three pillars of sustainable development and some of the aspects related to them.

Chart 1.1 - The Three Pillars



** Throughout this report, the term sustainable development covers the full range of issues outlined in the table above.*

The Agency is carrying out an in-depth analysis of its approach to sustainable development. This process is designed to help the Agency reach a view on what sustainable development looks like for the Food Standards Agency and what it means, in practice, for Agency policy making.

The FSA, Defra, WRAP, Ipsos Mori and other organisations have already conducted several pieces of research that help to give some understanding of consumer interest in relation to certain sustainability issues around food. Whilst this research does not address all the information requirements of the Agency, it provides some useful background. Therefore, further research was required to explore both current and possible future consumer sustainability concerns, and to feed into the Agency review of sustainable development in policy making by helping to inform the debate on how far down the sustainability route the Agency goes. This further research was required to feed into the debate around how pro-active the Agency should be in promoting the principles of sustainable development in policy making and how far, if at all, elements such as food safety, health, quality, consumer information and other interests could be traded-off against other aspects of sustainability such as environmental protection and use of natural resources etc.

b) Research objectives

The objectives of the research were to:

- Understand consumer priorities in relation to sustainable food policy (economy vs. society vs. environment) , as outlined in the three pillars
- Within this, assess the extent to which consumers would be willing to trade off aspects of food safety / choice / nutrition against other sustainability issues
- Explore whether consumers would be prepared to pay more for food in order to protect / improve the specific aspects of the economy, society or environment
- Explore consumer interest in the sustainability of food policy and any information requirements in this area.

2 Methodology

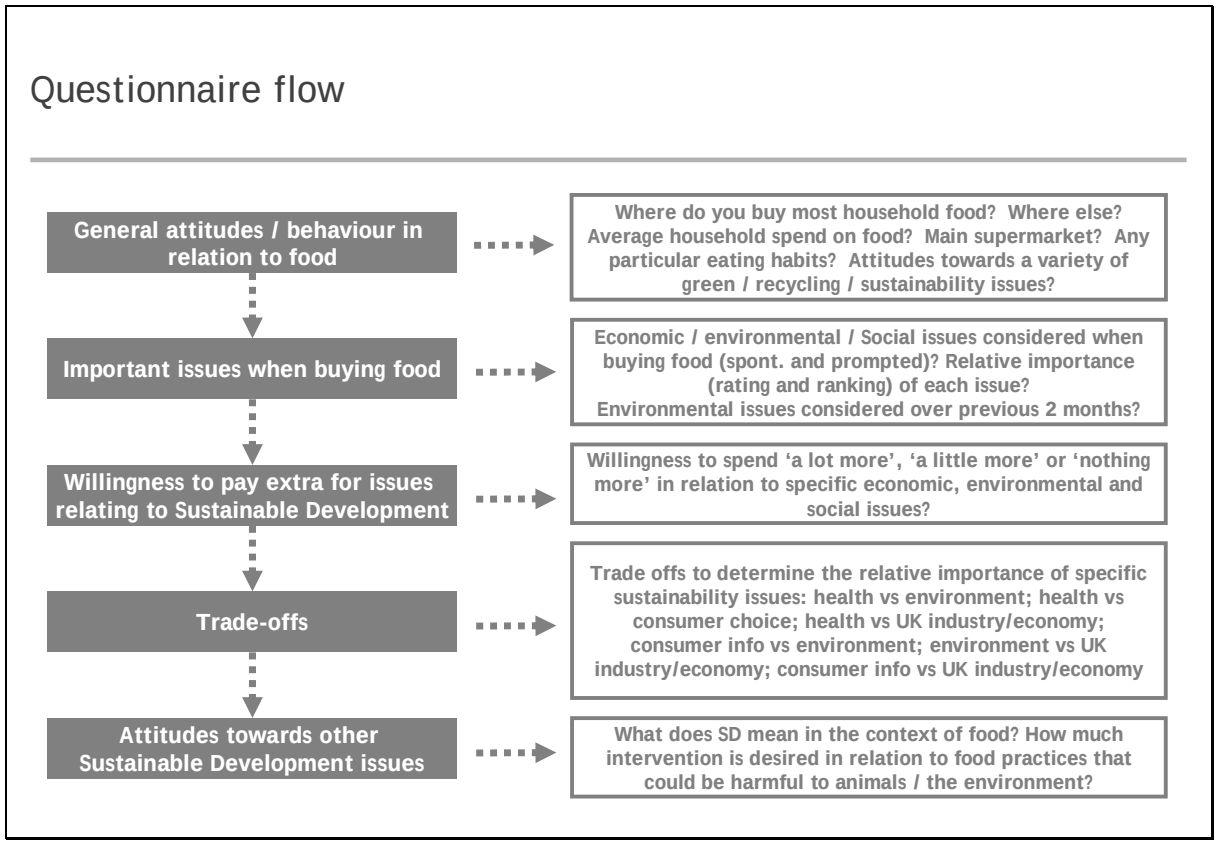
The research was conducted through face-to-face CAPI (Computer Aided Personal Interviewing) interviews with a representative sample of the UK population. Interviews were conducted using the TNS face-to-face omnibus survey. More information on this approach can be found in the Appendix.

An initial pilot study was conducted in February 2008 to ensure the questionnaire content was appropriate and easily understood.

The main stage of the survey was then conducted between 7th and 11th March 2008. A total of 2,068 interviews were conducted and, within this sample, 1418 respondents were principal shoppers (those personally responsible for selecting half or more of the items bought from supermarkets and food shops).

The survey took, on average, just over 20-minutes to complete. A copy of the questionnaire can be found in the appendix but the general flow of the questions can be seen in chart 2.1 below.

Chart 2.1 – Questionnaire flow



3 Summary and Conclusions

When buying food and groceries, consumers are most likely to consider economic issues, followed by social issues. Environmental issues are less likely to be taken into account. However, even so, over a half of shoppers (53%) consider at least one environmental issue when shopping for food/groceries.

A similar pattern emerges when consumers were asked to rank the factors that are most important to them when buying food/groceries with economic issues dominating, followed by social issues and then environmental issues. Two-thirds of shoppers (66%) rank an economic factor as most important, while 23% rank a social issue as most important and 10% rank an environmental issue as most important. When considering the individual issues when buying food and groceries, quality of food (29%), price (21%) and the healthiness of food (11%) were considered to be most important.

This is backed up by claimed behaviour. Most say they have carried out at least one 'food related environmental activity' in the last two months. However, not many are carrying out a number of distinct activities i.e. not many are doing all or even most of the following*: buying free range eggs, buying locally farmed meat, choosing fair trade products, buying organic meat/poultry, choosing food based on air miles or choosing fish based on stock levels. In total, only 1.5% of shoppers have conducted all six of these different food related environmental activities in the last 2 months, while 5% have conducted five or more and 13% have conducted four or more of these activities in the last 2 months.

** The reader should note that these terms were chosen as they are activities which are perceived to be environmental behaviours by consumers.*

The sub-groups most likely to have carried out food related environmental activities in the past or who consider or rank environmental issues highly are older shoppers (35+), those from social grade AB, women and those living in rural areas.

Consumer understanding of sustainable development is mixed, with two-fifths unable to provide a definition. Many did mention aspects related to sustainable development (esp. sustainability of food source/stocks/not wasting food), however many also talked about issues (although related) not directly linked to sustainable development e.g. eating healthier food.

When asked to trade-off different options in order to understand whether consumers would be willing to trade off aspects of food safety / choice / nutrition against other sustainability issues, opinions were polarised. Not one of the six trade-offs generated a majority preference of 51%. This general lack of agreement among consumers highlights the difficulty the Food Standards Agency will face in communicating these messages to the general public.

The largest gap was only 8%, where 49% chose detailed country of origin labelling even though this would lead to increased costs for industry. Interestingly there is evidence to suggest that choice is important to people (even if this to the detriment of other aspects of sustainability) with a large number of respondents happy to admit that they would prefer a choice of fruit/vegetables all year round even though this would mean more air

transportation (45% v 47%) or admit they would like to choose from a wide variety of fish regardless of stock levels (47% v 41%).

There appears to be a strong willingness among consumers to pay more for food in order to protect/improve aspects of the economy, society and environment. A majority of consumers (around 70%) claim they would be willing to spend more to ensure certain sustainability criteria are met (results are similar across the economic, social and the environmental pillars i.e. around 70% willing to spend more for each of these issues). However, the majority of those likely to spend more would only spend 'a little more' rather than 'a lot more'. This group tended to be younger (25-54 yrs), female, higher grocery spends (£100+ a week per household), those from social grade ABC1, those living in rural areas and those who shop at M&S or Waitrose.

4 Main Findings

a) Consumer priorities in relation to food policy

Respondents were asked a number of questions about their food/grocery shopping. In particular the questions aimed to understand **what issues consumers considered when buying food and groceries** and the **relative importance** of these issues. Respondents were therefore asked:

- What issues do you consider when choosing one food product over another?
- How do these issues rank in terms of importance?

By asking these questions, we were able to understand the relative importance of all issues for each respondent when buying food/groceries.

For the consideration question, respondents were first asked to name the issues important to them without any help or prompting from the interviewer i.e. the respondent had to spontaneously say what issues they considered when buying food/groceries. This was then followed up by a prompted question i.e. respondents were shown a list of issues and asked to pick the ones they considered when buying food/groceries.

As can be seen in chart 4.1, it tends to be economic issues that receive the most consideration when buying food, followed by social issues. Environmental issues* are less likely to be considered, although even these receive a fairly large number of mentions.

**The following issues were chosen as consumers perceive them to be 'environmental behaviours': buying free range eggs, buying locally farmed meat, choosing fair trade products, buying organic meat/poultry, choosing food based on air miles or choosing fish based on stock levels.*

In terms of **economic** issues, quality of food (71%) and price (70%) were the issues that received the most consideration when buying food. Price was the most common spontaneous mention with half of shoppers identifying it as an important issue (51%). Just over a half of shoppers mentioned special offers as something that is considered when buying food/groceries.

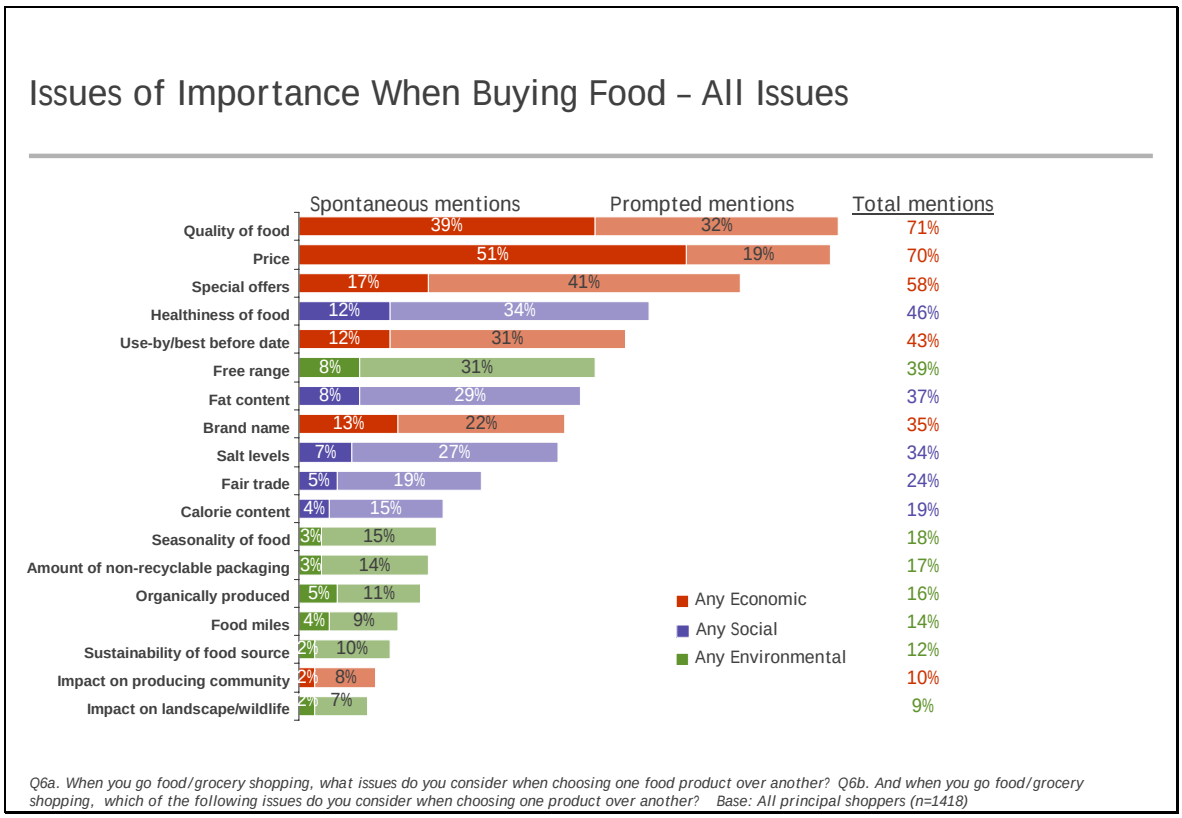
Healthiness of food was the most commonly considered **social** issue with almost half of shoppers considering it important when buying food (46%). Approximately one in three mentioned fat content and a similar proportion felt salt levels was something they thought about when shopping. A quarter said fair trade was something they considered, while one in five shoppers think about calorie content when buying food/groceries. NB. Fair Trade has been classified as 'social' although it can also been viewed as an environmental issue.

Environmental issues were the least likely to be considered when food/grocery shopping, but even so, over a third of shoppers (39%) considered whether the food/groceries were free range when shopping. It's worth pointing out that there was a lot of media coverage around free range chickens when the interviews were conducted (perhaps artificially

raising this as an issue in people's minds). This media coverage took the form of a series of television programmes hosted by Hugh Fearnley-Whittingstall and Jamie Oliver. These programmes tackled the question of intensively farmed chicken and launched the *Chicken Out!* campaign aimed at persuading the nation to eat more free-range chickens. All other environmental issues received mentions from less than one in five shoppers.

When looking at all seven environmental issues combined, a total of 53% of shoppers mentioned at least one of these issues as something they considered when buying food/groceries. These combined figures were higher for both Economic (94%) and Social (67%) issues.

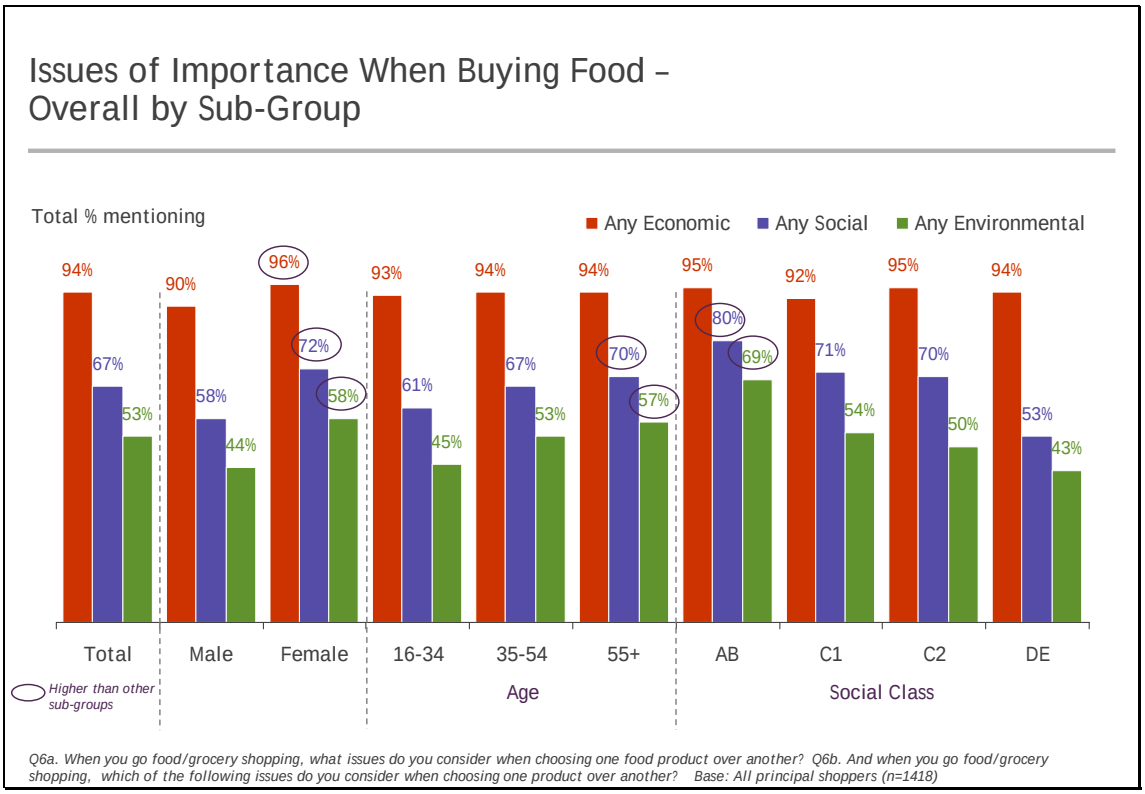
Chart 4.1 – Issues of Importance when buying food/groceries

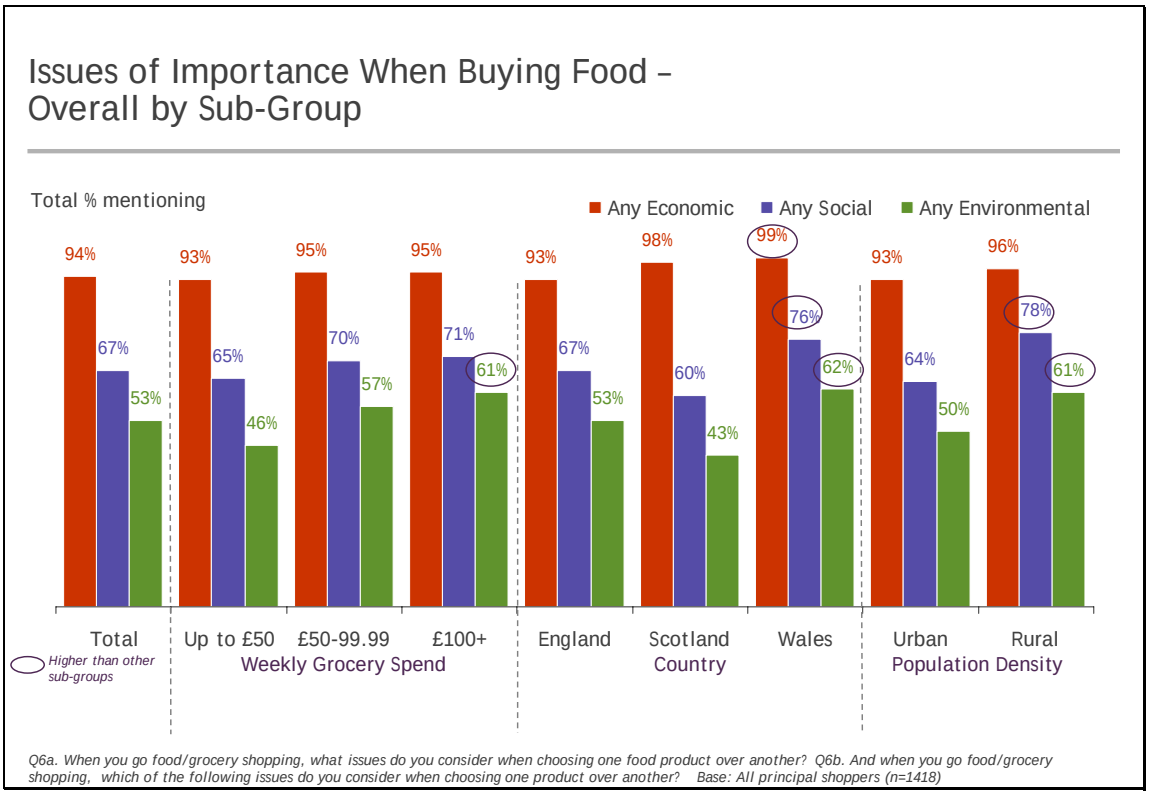


In order to identify any sub-group differences, the overall categories (economic, social and environmental) were analysed by key sub-groups. As can be seen in charts 4.2 and 4.3, women and those based in Wales are more likely (than other consumers) to consider economic issues when buying food/groceries. For social issues, it tends to be women, older shoppers (aged 55 or over), those from social grade AB, those based in Wales and those living in rural areas who tend to consider these issues more than average. Environmental issues are more likely to be considered by women, older shoppers (aged 55 or over), high food/grocery spenders (£100+ a week per household), those from social grade AB, those based in Wales and those living in rural areas.

One important point to mention is that (as can be seen above) women were more likely to mention all issues (than men) i.e. they were more likely to mention economic, social and environmental issues than men were. This implies that women are more engaged with issues related to shopping behaviour than men.

Chart 4.2 and 4.3 – Issues of Importance when buying food/groceries (by sub-group)





When looking at total mentions for the specific issues within each category, the story is similar with economic issues receiving the most mentions followed by social issues and environmental issues* (chart 4.4).

**The following issues were chosen as consumers perceive them to be 'environmental behaviours': buying free range eggs, buying locally farmed meat, choosing fair trade products, buying organic meat/poultry, choosing food based on air miles or choosing fish based on stock levels.*

In terms of **economic** issues, over a half of shoppers (56%) ranked quality of food as their first, second or third most important issues when shopping for food/groceries, while 44% ranked price as one of their top 3 issues when shopping (with 21% rating it the most important issue). Just under a quarter of shoppers rated the use-by/best before date and special offers as one of their top 3 issues when shopping.

Again healthiness of food was the **social** issue most likely to be considered important by shoppers with 29% rating this as a top 3 issue when shopping. Fat content was rated as a top 3 issue by 17%, while 16% rated salt levels as a top 3 issue.

Environmental issues were least likely to be considered important when food/grocery shopping. Free range was rated the most important environmental issue with 17% rating this as a top 3 issue. All other environmental issues were rated as a top 3 issue by fewer than 5% of shoppers.

When focussing on environmental issues (or those popularly perceived to be), it tends to be women, older shoppers (aged 55 or over) and those from social grades AB who are more likely to consider these issues when shopping.

Sex: Women are more likely to consider environmental issues when shopping than men. The biggest difference is when looking at fair trade, where 43% of women consider this issue compared with 32% of men.

Age: Those aged 55 or older are more likely than those aged 16-34 to consider the following issues when shopping:

- Seasonality of food (considered by 23% of those aged 55+ compared with 12% of those aged 16-34)
- Free range (considered by 42% of those aged 55+ compared with 32% of those aged 16-34)
- Amount of non-recyclable packaging (considered by 20% of those aged 55+ compared with 10% of those aged 16-34)
- Fair trade (considered by 27% of those aged 55+ compared with 17% of those aged 16-34)

Social grade: Shoppers in higher social grades are more likely to consider environmental issues when shopping than those in lower social grades. The biggest differences are evident in relation to:

- Free range (considered by 51% of ABs compared with 31% of DEs)
- Fair trade (considered by 40% of ABs compared with 16% of DEs)
- Seasonality of food (considered by 30% of ABs compared with 11% of DEs)
- Food miles (considered by 27% of ABs compared with 10% of DEs)

Food/Grocery spend: Environmental issues (or those popularly perceived to be) are more likely to be considered by high food/grocery spenders (£100+ a week per household). Once again, the biggest difference is when looking at fair trade. 49% of high spenders consider this issue when shopping compared with only 32% of low spenders (£50 or less a week per household). Another way of measuring spend is to look at average spend per person per week (rather than total household spend). Again there were some interesting differences with households spending £20 or more per person per week more likely to consider environmental factors than those spending less than £20 per person per week. In fact the differences were more pronounced than when measuring total household spend (suggesting spend per person is a more accurate predictor of behaviour than spend per household).

Country: Shoppers from Wales are more likely to consider environmental issues when shopping than those from Scotland. The biggest differences are evident in relation to:

- Free range (mentioned by 47% of Welsh shoppers compared with 34% of Scottish shoppers)
- Fair trade (mentioned by 31% of Welsh shoppers compared with 19% of Scottish shoppers)
- Seasonality of food (mentioned by 23% of Welsh shoppers compared with 11% of Scottish shoppers)

Rural/Urban: Those living in rural areas are more likely to consider environmental issues than those in urban areas. This tended to be across the board and no one issue stood out more than another.

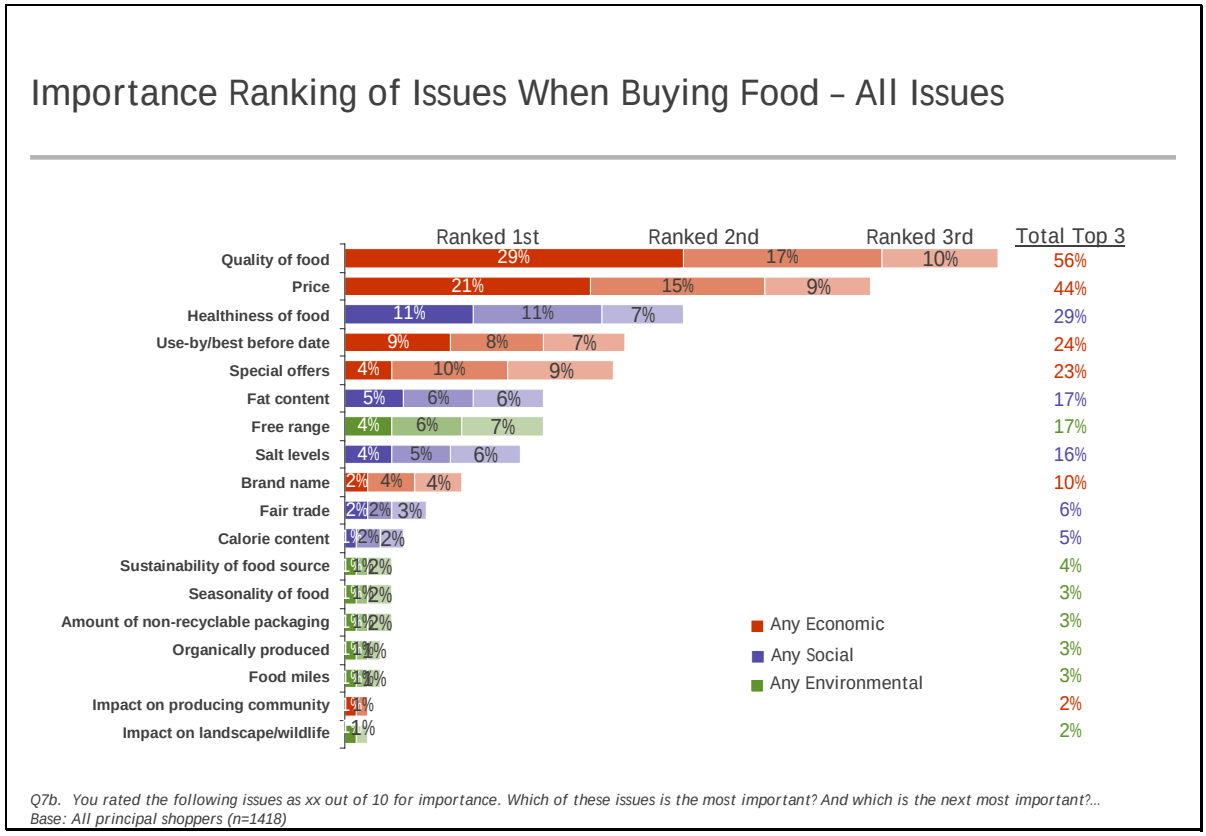
Vegetarians: Those who are fully or partly vegetarian are more likely to consider environmental issues than other consumers. This tended to be true for all issues, but especially for seasonality of food and sustainability of food source amongst those claiming to be partly vegetarian.

As well as being asked which issues are considered by shoppers when food/grocery shopping, respondents were also asked to rank the issues in rank order to understand the relative importance of each issue. Chart 4.4 below, demonstrates the proportion of respondents ranking each issue in their top 3 factors.

The actual hierarchy of issues is not too dissimilar to the overall consideration chart (chart 4.1). Once again, quality of food and price are identified as the most important issues and environmental issues tend to be rated less important than economic issues and social issues. Two-thirds of shoppers (66%) ranked an economic factor as most important,

while 23% ranked a social issue as most important and 10% ranked an environmental issue as most important (for 4%, this was whether the food was free range or not).

Chart 4.4 – Importance ranking of issues when buying food/groceries



Q7b. You rated the following issues as xx out of 10 for importance. Which of these issues is the most important? And which is the next most important?...
Base: All principal shoppers (n=1418)

b) Trading off different food aspects against other aspects of sustainability

Each respondent was asked to trade off six different scenarios by indicating, on a scale of 1-6, which option they preferred. Each trade off consisted of 2 options. If they preferred the first option, they were to give a score of 1, 2 or 3 and if they preferred the second option they were to give a score of 4, 5 or 6. The stronger they preferred one of the options; the more they needed to select the number further to the left or right. So, for example, if they strongly preferred the first option they would give a score of 1 (rather than 2 or 3) and if they strongly preferred the second option they would give a score of 6 (rather than 4 or 5). If they only marginally preferred one option over the other they would give a score of 3 or 4. A full detail of how the trade off was run is included in the questionnaire (Q9) in the appendix.

The full detail of the six trade-offs is set out below:

1. Health vs. Environment

Eating two portions of fish, including a portion of oily fish (e.g. salmon, mackerel etc) a week helps to keep us healthy. However, numbers of many types of fish are under threat and could be destroyed completely if fishing continues at the rate it is. Which number would you choose?

Option to eat wide variety of fish but fish stocks continue to diminish	*VS*	*Protect fish stocks but less fish varieties available to eat*

1	*2*	*3*		*4*	*5*	*6*

Strongly prefer *Strongly prefer*

2. Health vs. Consumer choice

One of your favourite sweet products has been found to be a possible choking hazard for small children and the manufacturers therefore need to decide on an appropriate course of action to take. Which number would you choose?

Sweet product to be kept on shelves but with warning notice on label	*VS*	*Product removed from shelves completely*

1	*2*	*3*		*4*	*5*	*6*

Strongly prefer *Strongly prefer*

3. Health vs. UK Industry/economy

Eating too much salt in our diet is bad for us as it can raise our blood pressure and increase the chance of developing heart disease. Three-quarters of the salt we eat is in the food we buy so it is hard to be sure whether we are eating too much. Reducing levels of salt in food is expensive and could result in high costs to UK Industry and subsequently effect profitability and jobs. Which number would you choose?

Reducing salt levels but increasing costs (risking profitability and jobs)	*VS*	*Keep current salt levels as they are*

1	*2*	*3*		*4*	*5*	*6*
Strongly prefer					*Strongly prefer*

4. Consumer Information/Choice vs. Environment

Consumers today enjoy a wide variety of choice of fresh fruit and vegetables, some of which are flown in from distant parts of the world e.g. strawberries or green beans in the winter. However, air transport produces a lot more greenhouse gas emissions compared to other forms of transport and so contributes to global warming and climate change. Which number would you choose?

Less choice of fruit and vegetables at certain times of the year but reduced air transportation	*VS*	*Lots of choice of fruit and vegetables all year round but with existing levels of air transportation*

1	*2*	*3*		*4*	*5*	*6*
Strongly prefer					*Strongly prefer*

5. Environment v UK Industry & Economy

Palm oil is widely used in the UK food industry (found in products such as chocolate, biscuits and crisps) but its production is damaging to endangered species in rain forests. Unfortunately, alternatives to palm oil would cost the food industry a lot more money and so make it less profitable and cause potential job losses. Which number would you choose?

Reduced use of Palm Oil to alleviate plight of endangered species in rain forests but increasing cost (risking profitability and jobs)	*VS*	*Continued use of Palm Oil at current levels with no increases in costs*

1	2	3		4	5	6
Strongly prefer						*Strongly prefer*

6. Consumer information & Choice v UK Industry & Economy

Providing information to consumers about the country of origin of food they buy is fairly straightforward for single ingredient products such as a tomato. However, it's much more difficult and expensive to provide this information for products made from a variety of ingredients such as tomato ketchup where the label would have to change whenever the recipe changed or ingredients where sources were from a different country. Which number would you choose?

Detailed country of origin labelling on multi-ingredient products but increasing costs (risking profitability and jobs)	*VS*	*No detailed country of origin labelling on multi-ingredient products*

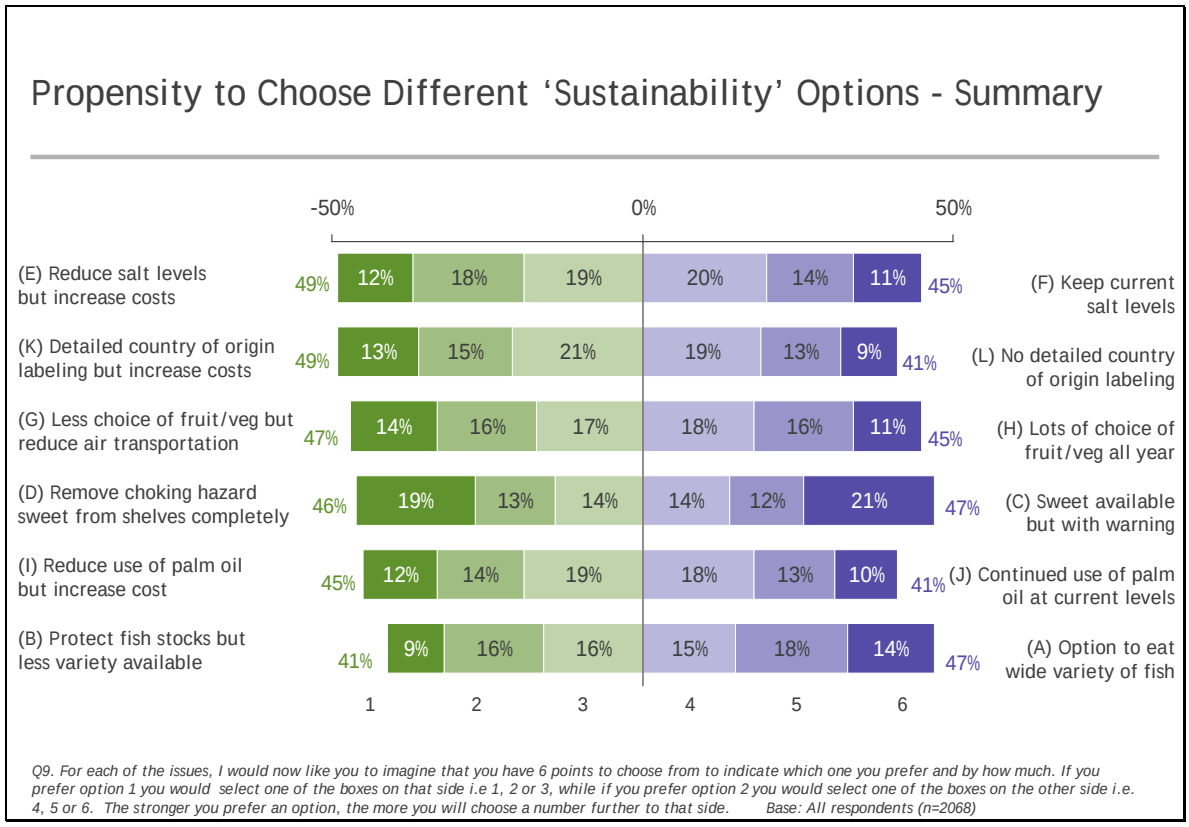
1	2	3		4	5	6
Strongly prefer						*Strongly prefer*

Chart 4.5 below summarises the results from these trade-off exercises. The letter in brackets before each summary description relates to the letters used on the detailed trade-offs earlier in this section.

Views were polarised with not one of the six trade-offs generating a majority preference of 51%. The largest gap was only 8%, where 49% chose detailed country of origin labelling even though this would lead to increased costs for industry.

Interestingly, a large number of respondents are happy to admit that they would prefer a choice of fruit/vegetables all year round (45%) or a wide variety of fish regardless of stock levels (47%). Relatively few respondents answered 'don't know' or 'not able to answer'.

Chart 4.5 – Propensity to choose different 'Sustainability' options - Summary



When looking at each of the trade-offs in isolation, there were very few sub-group differences. The only differences identified were as follows:

- **Country**: Those from Northern Ireland tend to pick options enabling more choice. They are more likely to choose detailed country of origin labelling but increase costs and have sweets available but with a warning than respondents from other countries.
- **Food/Grocery spend**: low food/grocery spenders (less than £25 spent on food per week per household) also tend to pick options enabling more consumer choice,

especially favoring a choice of fruit/vegetables all year (when compared to higher spenders).

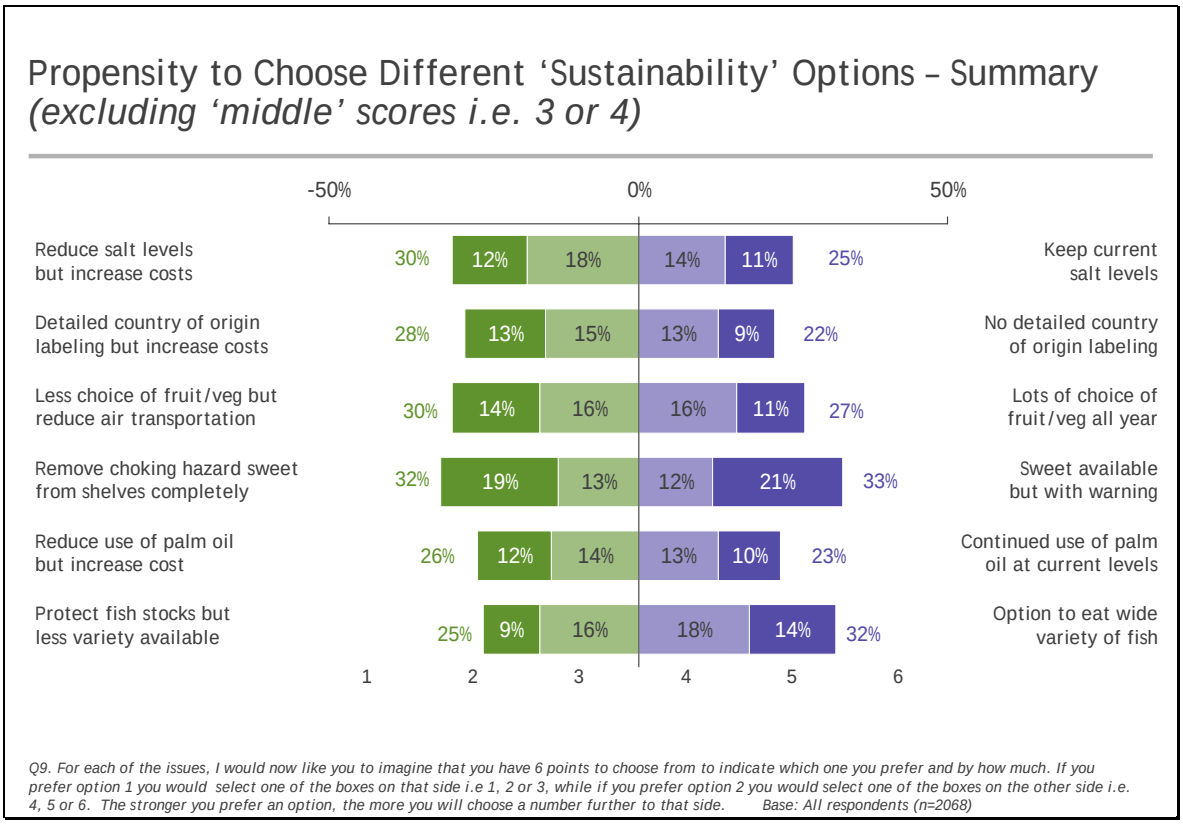
- **Age**: Those aged 25 or older were more likely to prefer a choice of fish than those aged under 25.

To further understand differences between different sub-groups, we looked at the differences between those who consider at least one (of seven) environmental issues when buying food/groceries (53% of the total sample of shoppers – mentioned just before chart 4.1) and those who don't consider any environmental issues when buying food/groceries (47% of shoppers). Again, there were very few differences, although those considering environmental issues were more likely to give an answer (and not say 'don't know'). They were also more likely to favour a choice of fruit and vegetables all year round and to want less detailed labeling on multi-country packaging.

In order to see whether any additional insights could be uncovered, the middle scores (i.e. 3 and 4) were removed to see if any differences would become more pronounced. The thinking behind this was that by removing those people who feel less strongly about each issue we might identify some bigger gaps in preference.

As can be seen in chart 4.5 below, this did not have a significant impact on the scores, with the largest gap now at 7% (rather than 8% when the middle scores were included).

Chart 4.5 – Propensity to choose different 'Sustainability' options (excl. middle scores)



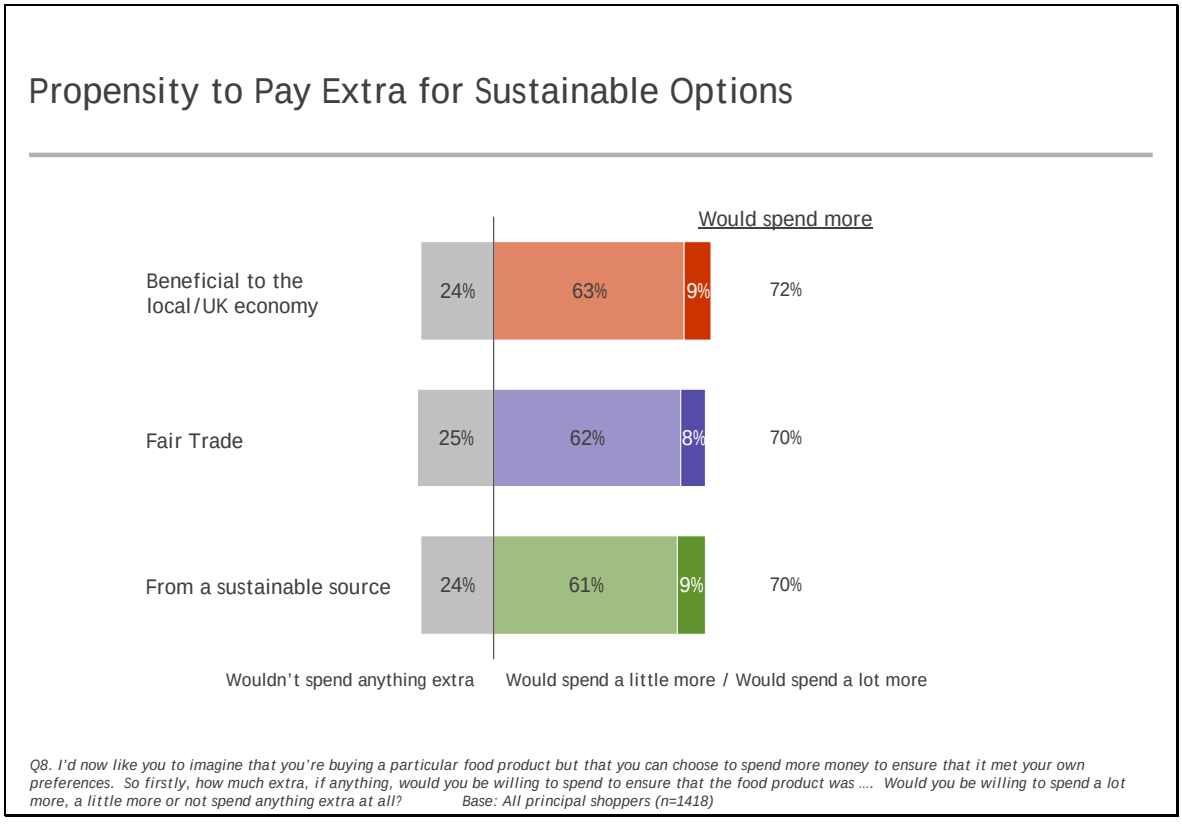
As part of the analysis, we also looked at sub-groups who generally scored more trade-offs at 5 or 6 or 1 and 2, rather than 3 or 4. We can assume that these respondents are more engaged with the issues generally because they have given more 'extreme' scores. The only sub-groups consistently more likely to award 'extreme' scores was those aged 25 or older i.e. those aged under 25 were more disengaged with the issues; and those respondents who (in a later question) would like all food giving less consideration to animals/the environment to be removed from the shelves completely. The only other difference was that women felt more strongly about removing choking hazard sweets than men.

c) Willingness to pay more to ensure sustainable criteria is met

Shoppers were asked whether they would be willing to pay more to ensure that certain sustainable issues were met. There were three criteria: beneficial to the local or UK economy, fair trade and from a sustainable source.

As demonstrated in chart 4.6 below, most shoppers claim they are willing to spend more although only one in ten are willing to 'spend a lot more'. Approximately one in four say they wouldn't spend any more to ensure that certain sustainable issues were met, while just under two-thirds would spend a little more and one in ten would spend a lot more.

Chart 4.6 – Propensity to pay extra for sustainable options



The following sub-groups are more likely to spend more across all issues:

- ABC1s
- Aged 25-54
- Females
- Those living in rural areas
- High grocery spenders
- Those shopping at M&S/Waitrose
- Part/full vegetarians

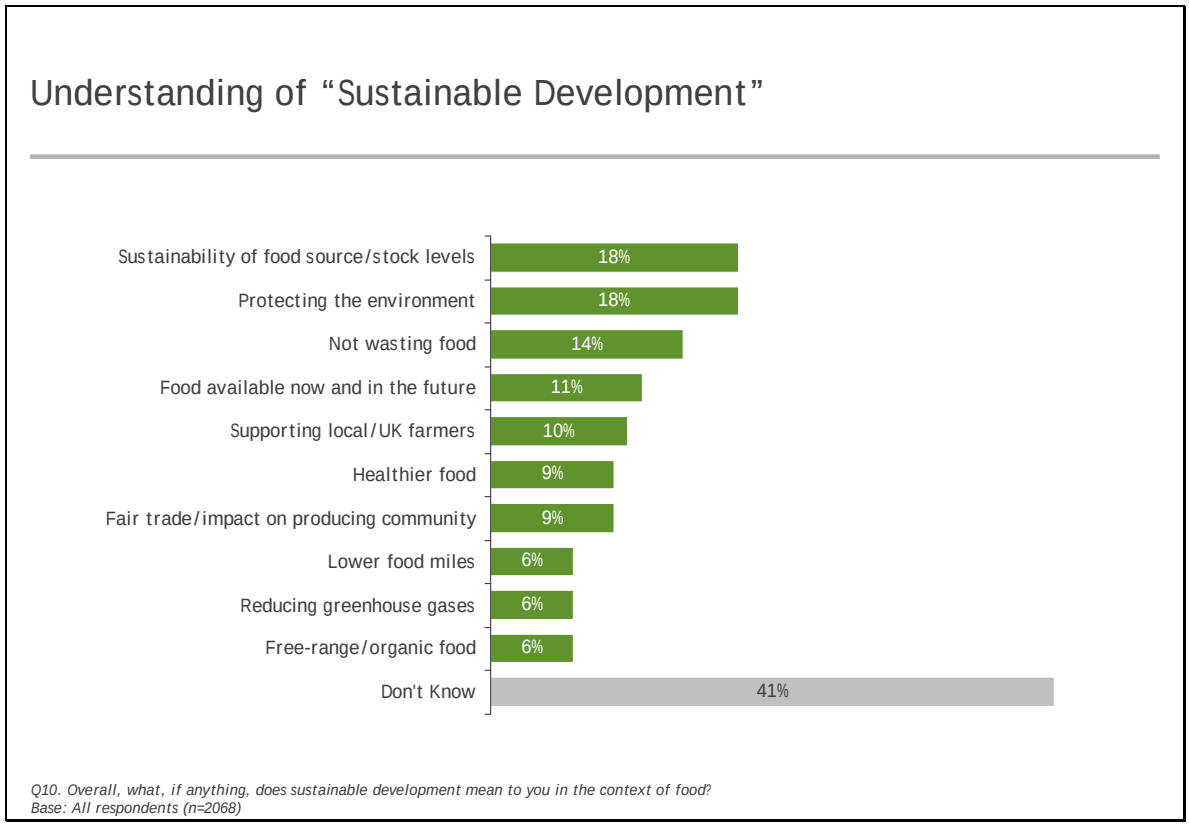
d) Consumer interest in sustainability of food policy

All respondents were asked what they thought sustainable development meant to them in the context of food. It's important to note that this question was asked near the end of the interview when we had already discussed a number of related issues and therefore the respondents may have become 'educated' during the interview process.

As can be seen from the chart 4.7, consumer understanding is mixed. Many consumers mentioned aspects relating directly to sustainable development, although two-fifths (41%) weren't able to give an answer.

Just under one in five respondents mentioned sustainability of food source/stock levels and the same proportion talked about protecting the environment. Just over one in ten respondents mentioned not wasting food (14%) and food available now and in the future (11%).

Chart 4.7 – Understanding of "Sustainable Development"



In order to gauge environmental behaviour*, respondents were asked:

- What environmental activities they had carried out in the last 2 months (from a list)?
- What environmental activities they carry out whenever they can (from a list)?

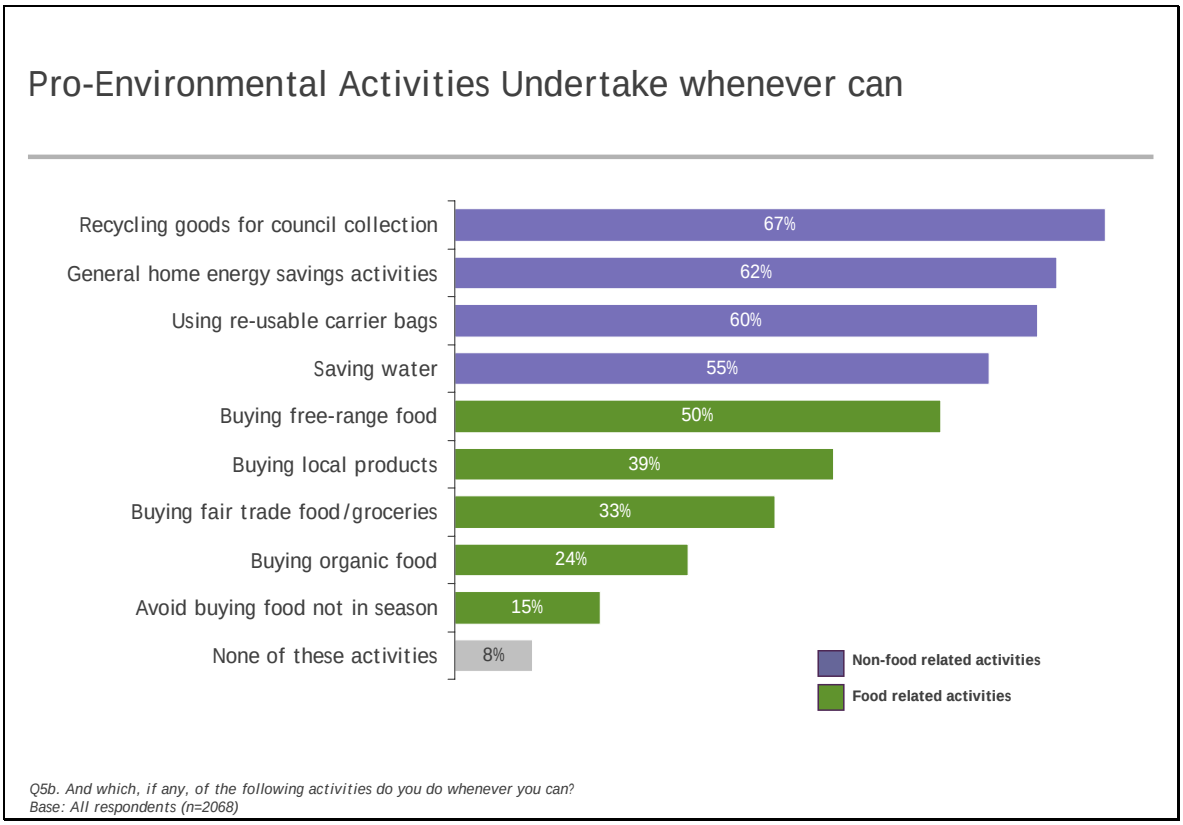
** The reader should note that the food related environmental activities are those that are popularly perceived to be environmentally sustainable activities by consumers.*

As can be seen in chart 4.8, people tend to carry out non-food environmental activities more often than food related ones.

The most popular environmentally friendly activity was recycling goods for council collection mentioned by two-thirds of consumers. Other environmental activities carried out by over half of consumers related to recycling carrier bags and energy/water saving.

Of the food related environmental activities, buying free-range food is the most popular with exactly a half of consumers mentioning carrying out this activity. A third of consumers also mentioned buying local products and fair trade food/groceries. Avoiding buying food not in season was the least popular food environmental activity carried out by fewer than one in five consumers (15%).

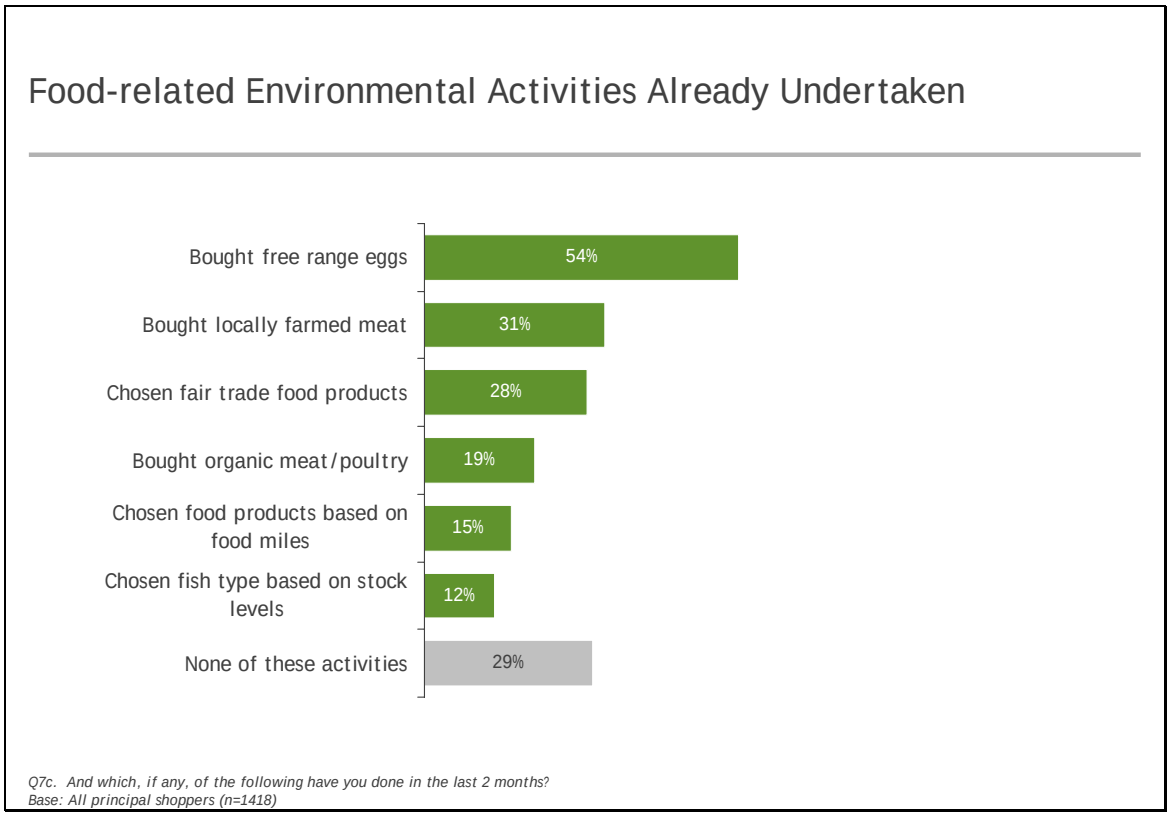
*Chart 4.8 – * Pro-environmental activities undertaken whenever can*



** Although not all of these activities are strictly always the more environmentally friendly options, consumers tend to think they are. For this reason, we have classified all as pro-environmental activities.*

Chart 4.9 demonstrates that the number of people carrying out environmentally related activities is mixed, with a slight majority (54%) having bought free range eggs in the last two months, while about one in three have bought locally farmed meat (31%) and chosen fair trade food products (28%). In this instance we have classified fair trade as an environmental activity (even though earlier in the report it is classified as a social issue). Less than one in five have bought organic meat/poultry (19%), chosen food products based on food miles (15%) and chosen fish types based on stock levels (12%).

*Chart 4.9 – * Food-related environmental activities undertaken in last 2 months*



** Although not all of these activities are strictly always the more environmentally friendly options, consumers tend to think they are. For this reason, we have classified all as pro-environmental activities.*

Further analysis shows that most people carry out at least one food related environmental activity (out of the six shown in chart 4.9) with less than a third of shoppers (29%) not carrying out any. However, not many are carrying out a number of different activities. In total, only 1.5% of shoppers have conducted all six of the activities listed in chart 4.9 in the last 2 months, while 5% have conducted five or more

and only 13% have conducted four or more of food related environmental activities in the last 2 months.

The following sub-groups were found to be more likely to undertake each activity:

- ABC1s
- Aged 35+
- Females
- High grocery spenders (£100+ a week per household)
- Those shopping at M&S/Waitrose
- Those respondents currently considering at least one (of seven) environmental issues when buying food/groceries

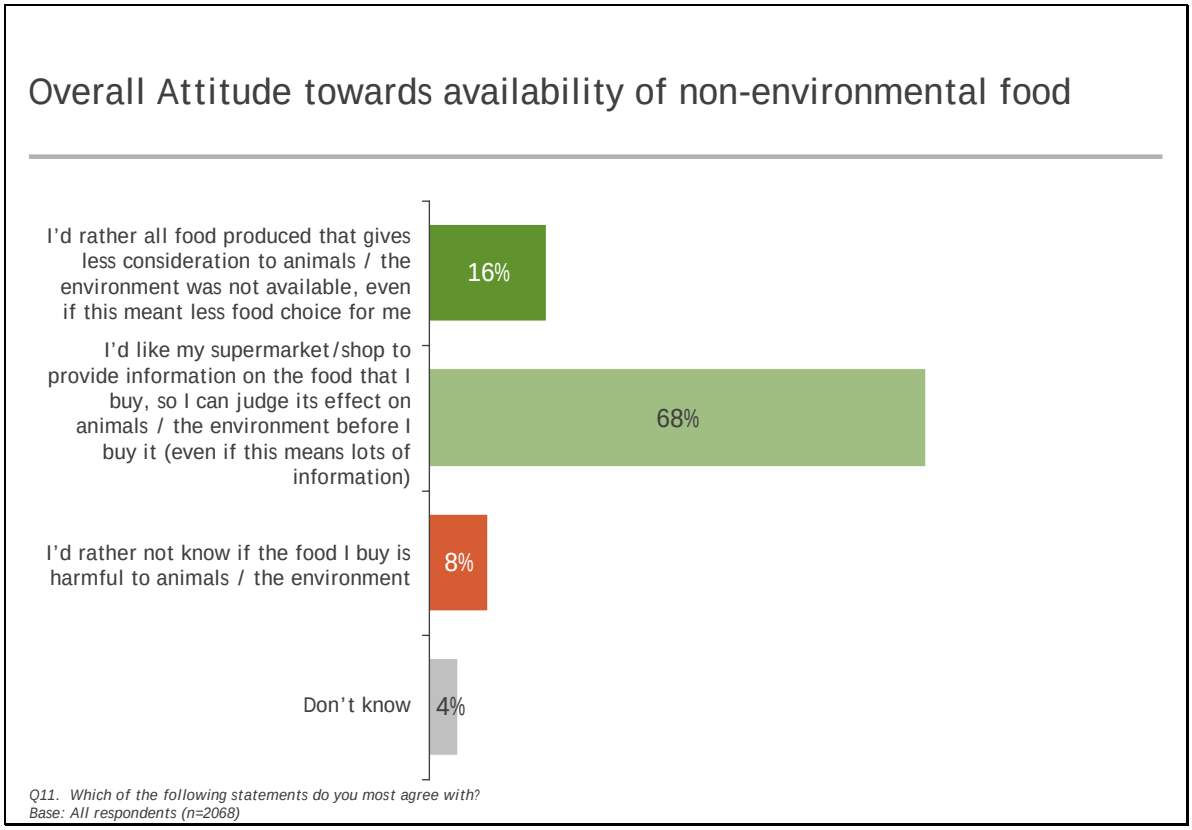
e) Choice

When offered the choice of a ban, information or no information at all, two-thirds of consumers would prefer access to information on the food they buy so they can make a choice about non-environmental foods (chart 4.10). Fewer than one in ten consumers would rather not know if the food they bought was harmful to animals/the environment. One in six consumers (16%) were likely to want a ban on non-environmental food, even if this meant less choice. The following sub-groups were more likely to want a ban:

- ABC1s
- Those living in rural areas
- Those living in Wales
- Those shopping at Waitrose

C2DEs were more likely to rather not know.

Chart 4.10 – Overall attitude towards availability of non-environmental food



f) Identifying those with high food environmental behaviour

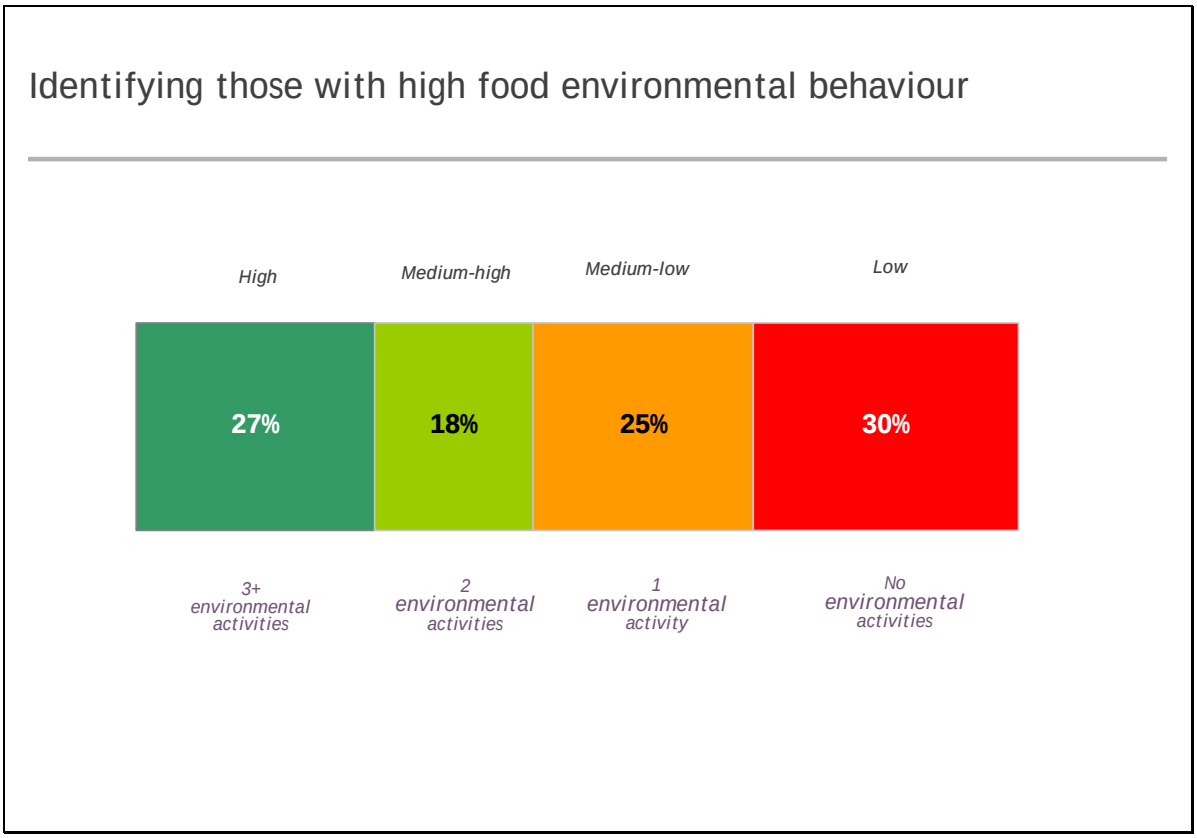
Through analysis, we identified four distinct groups based on their existing food environmental behaviour.

Consumers were assigned to these groups based on whether they carry out up to five different food environmental (and related) activities whenever they can (those listed in chart 4.8 – green bars). The activities were: buy organic food, buy free-range goods, buy fair trade food, buy local products and buy seasonal food.

Chart 4.11 shows how these 4 groups were defined and the number of respondents within each.

- High – carry out at least 3 out of 5 different food environmental (and related) activities
- Medium-High – carry out 2 different food environmental (and related) activities
- Medium-Low – carry out 1 different food environmental (and related) activity
- Low – carry out no food environmental (and related) activities

Chart 4.11 – Identifying those with high food environmental behaviour



As can be seen from the table below (4.12), the 'high environmental' group are more likely than the 'low environmental' group to be female, aged 35+, from social grade ABC1, be married/living with a partner, live in the South East, in rural areas, spend £50 or more on groceries a week and want a ban on non-environmental foods.

When shown the environmental food option trade-offs, the 'high environmental' group were no more likely to pick one option over the other (compared with consumers as a whole). However, they were more likely to give 'extreme' scores i.e. scores of 1, 2 or 5, 6 (rather than 3 or 4). This demonstrates that this group feels more strongly about the issues and is more engaged with food environmental issues generally.

Table 4.12 – Profiling those with high and low food environmental behaviour

	All respondents	'High environmental' Group	'Low environmental' Group
Be female	52%	58%	46%
Be aged 35+	68%	76%	61%
Come from social grades ABC1	21%	33%	11%
Be married/living with partner	57%	69%	48%
Live in the South East	14%	20%	12%
Live in rural areas	22%	28%	20%
Spend £50+ on groceries a week	59%	68%	50%
Want non-environmental foods removed from shelves	16%	23%	11%

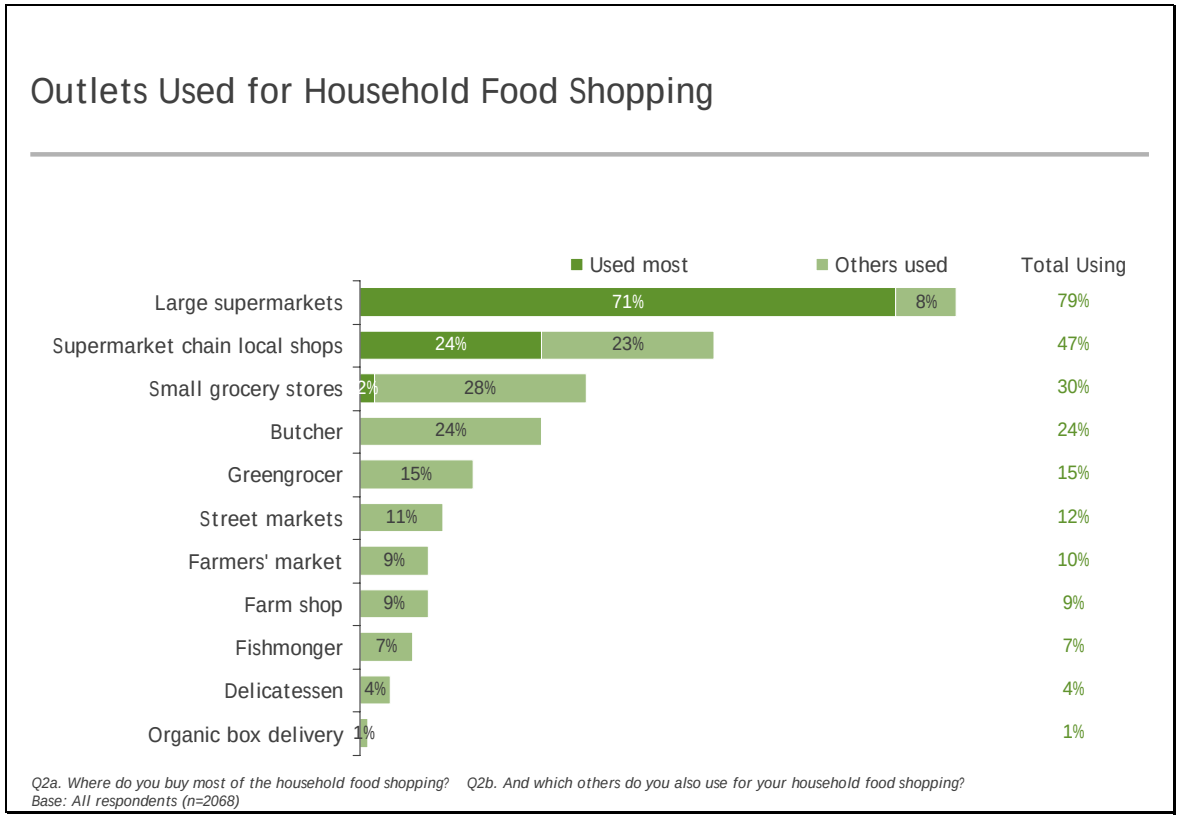
Appendix 1 – Current food purchasing behaviour

Current food purchasing behaviour

A number of questions were asked to assess respondents' current food purchasing habits for cross analysis purposes, the findings from these questions are shown below.

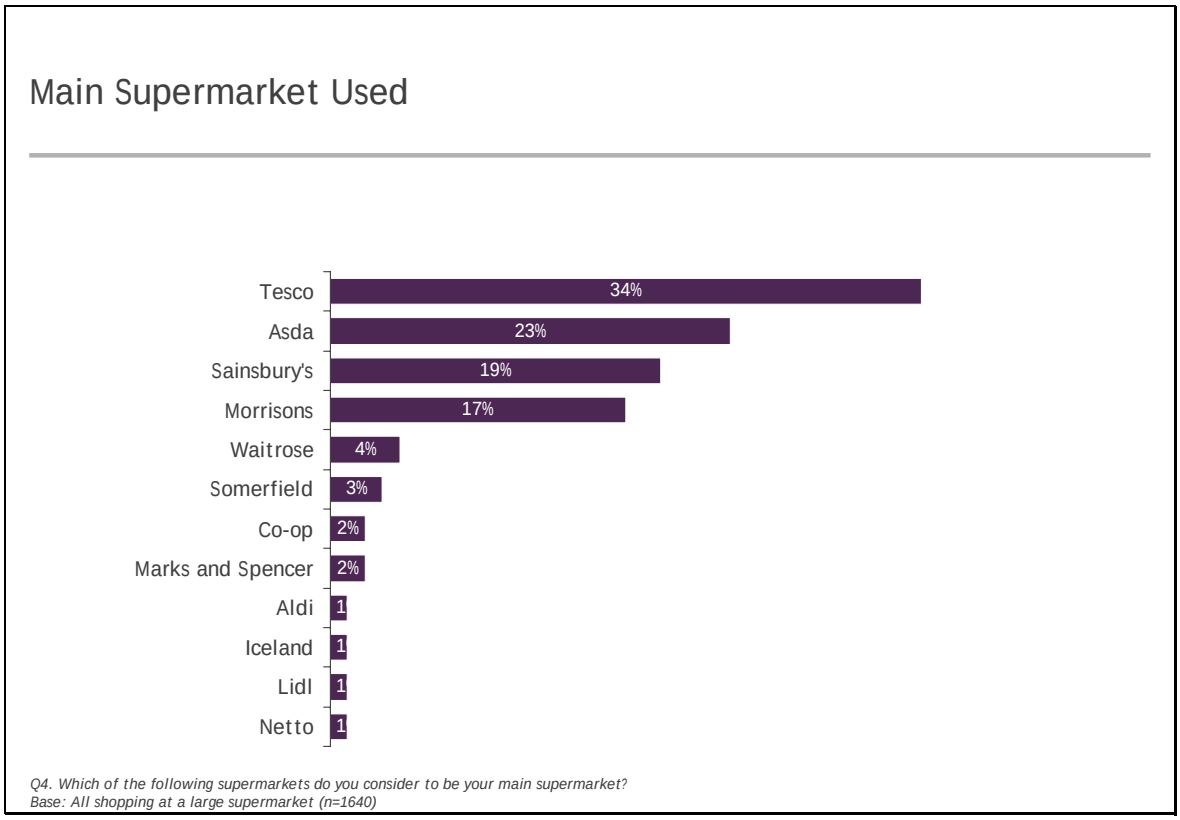
As shown in chart 4.13 below, the vast majority of consumers do their shopping in large supermarkets or supermarket local shops. 95% do most of their shopping in these outlets. However, a number of respondents do use other outlet types from time to time.

Chart 4.13 – Outlets used for household food shopping



Those who ever shop at large supermarkets were asked which supermarket they considered to be their main supermarket. Tesco is the most popular supermarket with a third of shoppers (using supermarkets) considering it to be their main supermarket. Asda (23%), Sainsbury's (19%) and Morrisons (17%) are also popular. All other supermarkets are considered to the main supermarket for fewer than 5% of shoppers.

Chart 4.14 – Main supermarket used



One in three shoppers spend less than £50 per week on food and groceries (chart 4.15), while over half (55%) spend between £25 and £75. 16% spend between £75 and £99 and 14% spend £100 or more. 8% didn't know. The average weekly spend on grocery shopping is £67.

Chart 4.15 – Average weekly spend on food/grocery shopping

Q3. Typically, what is your approximate total household spend in an average week on food and grocery shopping i.e. excluding spend on non-food goods?
Base: All respondents (n=2068)

When looking at spend by the number of people in the household, we can roughly calculate spend per person. The figures are as follows:

- Under £20 per person per week: 34%
- £20-£34 per person per week: 34%
- £35 or more per person per week: 25%
- Don't know: 8%

The conclusions for this report can be found in section 2 (p6).

Appendix 2 – Questionnaire

FSA SUSTAINABLE DEVELOPMENT RESEARCH

MAIN STAGE QUESTIONNAIRE FINAL

99502

IF NOT PRINCIPAL SHOPPER, THEN ASK Qs 2a/b, 3, 4, 5a, 5b, 9, 10 and 11 (BUT DO NOT ASK Qs 6, 7, 8)

A. GENERAL ATTITUDES / BEHAVIOUR

Q2a. Where do you (INCLUDE FOLLOWING TEXT IF NOT PRINCIPAL SHOPPER:, or whoever does the shopping in your household) buy most of the household food shopping? **- SHOW SCREEN - CODE BELOW**

Q2b. And which others do you also use for your household food shopping? **- SHOW SCREEN - MULTI CODE BELOW**

Large supermarkets	1	1
Supermarket chain local shops (Tesco Metro, Sainsbury Local)	2	2
Small grocery stores or corner shops	3	3
Greengrocer	4	4
Fishmonger	5	5
Butcher	6	6
Delicatessen	7	7
Farmers' market	8	8
Farm shop	9	9
Street markets	10	10
Organic fruit/vegetable box delivery	11	11
None of the above	12	12

Q3. Typically, what is your approximate total household spend in an average week on food and grocery shopping i.e. excluding spend on non-food goods?

INTERVIEWER NOTE – IF RESPONDENTS FIND THIS DIFFICULT TO ANSWER THEN STRESS THAT WE ONLY NEED AN APPROXIMATION

SHOW SCREEN

Less than £10 1
£11 - £25 2
£26 - £50 3
£51 - £75 4
£76 - £100 5
£101 - £150 6
£151 - £200 7
Over £200 8
Don't know 9

IF SHOP AT SUPERMARKETS AT Q2a/b (CODE 1), THEN ASK Q4 – OTHERS SKIP TO Q5

Q4. Which of the following supermarkets do you consider to be your main supermarket?

SHOW SCREEN – ALLOW MUTLICODE IF RESPONDENT HAS 2 MAIN SUPERMARKETS

Aldi 1
Asda 2
Booths 3
Budgens 4
Co-op 5
Costco 6
Iceland 7
Lidl 8
Marks and Spencer 9
Morrisons 10
Netto 11
Sainsbury's 12
Somerfield 13
Tesco 14
Waitrose 15
Other (specify) 16
No main supermarket 17

ASK ALL

Q5ai. Which, if any, of the following applies to you?

SHOW SCREEN

I am completely vegetarian 1
I am partly vegetarian 2
I am a vegan 3
None of the above 4

Q5aii. Which, if any, of these applies to you?

SHOW SCREEN

I am allergic to certain food 1
I am on a diet trying to lose weight 2
I avoid certain food for religious reasons 3
I avoid certain food for medical reasons 4
None of the above 5

Q5b. And which, if any, of the following activities do you do **whenever you can**?

ROTATE ORDER - SHOW SCREEN

Recycle goods for council collection i.e. collected from your home address or by taking them to recycling points 1
Use re-usable carrier bags when food/grocery shopping 4
Buy organic food 5
Buy free-range food e.g. meat, eggs etc 6
General home energy savings activities e.g. not leaving the TV on standby, not leaving lights on in rooms, use energy saving light bulbs etc 9
Saving water e.g. only filling the kettle with as much water as you need, turning the tap off when cleaning your teeth 10
Buy fair trade food/groceries – i.e. ensures a fair deal for producers in developing countries 11
Buy local products 12
Avoid buying food that is not in season 13
None of the above 14

B. IMPORTANT ISSUES WHEN BUYING FOOD

Read out: I'd now like you to think about all the food and groceries you might buy when doing your shopping. This includes all types of food e.g. meat and poultry, fish, fruit and vegetables, dairy products, bread, tinned food, tea and coffee, crisps and confectionery etc.

Q6a. When you go food/grocery shopping, what issues do you consider when choosing one food product over another?
DO NOT PROMPT – MULTI CODE BELOW –
PROBE AFTER EACH ANSWER 'ANY THING ELSE?' UNTIL RESPONDENT SAYS THERE ARE NO OTHER ISSUES CONSIDERED

Q6b. And when you go food/grocery shopping, which of the following issues do you consider when choosing one product over another? **SHOW SCREEN – ROTATE ORDER - MULTI CODE BELOW**

RESPONDENTS WOULD NOT SEE THE TERMS: ECONOMIC, ENVIRONMENTAL OR SOCIAL FOR ANY OF THE FOLLOW UP QUESTIONS (FOR INTERNAL VIEW)

	Q6a	Q6b
Economic		
Price	1	1
Special offers	2	2
Quality of food	3	3
Brand name	4	4
Use-by date / best before date	5	5
Impact on the community where food comes from e.g. benefit to local community / creation of jobs	7	7
Environmental		
Organically produced	8	8
Free range	9	9
Seasonality of food	10	10
Food miles i.e. distance food has travelled	11	11
Sustainability of food source e.g. numbers of fish diminishing	12	12
Impact on the landscape/wildlife where the food was produced e.g. impact on endangered species	13	13
Amount of non-recyclable packaging used	14	14
Social		
Fair trade – i.e. ensures a fair deal for producers in developing countries	16	16
Healthiness of the food	17	17
Salt levels	18	18
Fat content	19	19
Calorie content	20	20
Other (please specify)	22	22

Q7a. I'd now like you to rate each issue on a scale of 1 to 10, where 10 means that issue is extremely important when choosing one food product over another and 1 means it's not at all important

SHOW SCREEN
ONLY SHOW FACTORS SELECTED AT Q6a OR Q6b

Economic

Price ..... [ ]
Special offers ..... [ ]
Quality of food ..... [ ]
Brand name ..... [ ]
Use-by date / best before date ..... [ ]
Impact on the community where food comes from
e.g. benefit to local community / creation of jobs ..... [ ]

Environmental

Organically produced ..... [ ]
Free range ..... [ ]
Seasonality of food ..... [ ]
Food miles i.e. air transportation ..... [ ]
Sustainability of food source e.g. numbers of fish diminishing ..... [ ]
Impact on the landscape/wildlife where the food
was produced e.g. impact on endangered species ..... [ ]
Amount of non-recyclable packaging used ..... [ ]

Social

Fair trade – i.e. ensures a fair deal for producers in developing countries .... [ ]
Healthiness of the food ..... [ ]
Salt levels ..... [ ]
Fat content ..... [ ]
Calorie content ..... [ ]

RANK EVERY FACTOR AT Q7a BY BREAKING EACH EXERCISE DOWN INTO DIFFERENT RATING GROUPS – IF ONLY ONE FACTOR GETS A SPECIFIC RATING THEN AUTIMATICALLY RANK THAT FACTOR NEXT IN RANK

Q7b. You rated the following issues as 10 out of 10 for importance. Which of these issues is the most important? And which is the next most important?... continue until all issues ranked.
SHOW SCREEN

You rated the following issues as 9 out of 10 for importance. Which of these issues is the most important? And which is the next most important?... continue until all issues ranked. **SHOW SCREEN**

REPEAT FOR ALL RATINGS UNTIL HAVE FULLY RANKED LIST

Economic
Price ..... [ ]
Special offers ..... [ ]
Quality of food ..... [ ]
Brand name ..... [ ]
Use-by date / best before date ..... [ ]
Impact on the community where food comes from
e.g. benefit to local community / creation of jobs ..... [ ]

Environmental
Organically produced ..... [ ]
Free range ..... [ ]
Seasonality of food ..... [ ]
Food miles i.e. air transportation ..... [ ]
Sustainability of food source e.g. numbers of fish diminishing ..... [ ]
Impact on the landscape/wildlife where the food
was produced e.g. impact on endangered species ..... [ ]
Amount of non-recyclable packaging used ..... [ ]

Social
Fair trade– i.e. ensures a fair deal for producers in developing countries ..... [ ]
Salt levels ..... [ ]
Fat content ..... [ ]
Calorie content ..... [ ]

Q7c. And which, if any, of the following have you done **in the last 2 months**?

ROTATE ORDER - SHOW SCREEN

Chosen one type of fish over another because its stock levels were under less threat 1
Bought free range eggs in preference to non-free range eggs 2
Bought organic meat/poultry in preference to non-organic meat/poultry..... 3
Chosen one food product over another because it had less food miles i.e. distance food has travelled..... 4
Chosen one food product over another because it was fair trade – i.e. ensures a fair deal for producers in developing countries 5
Bought meat that you knew was farmed locally..... 6
None of the above 7

C. WILLINGNESS TO PAY EXTRA FOR ISSUES RELATED TO SUSTAINABLE DEVELOPMENT

Q8. I'd now like you to imagine that you're buying a particular food product but that you can choose to spend more money to ensure that it met your own preferences.

So firstly, how much extra, **IF ANYTHING**, would you be willing to spend to ensure that the food product was (READ OUT FIRST STATEMENT). Would you be willing to spend a lot more, a little more or not spend anything extra at all?

ROTATE STATEMENTS

RESPONDENT TO FILL IN SELF-COMPLETION ON SCREEN

For subsequent statements ask:
And how much extra, **IF ANYTHING**, would you be willing to spend to ensure that the food product was…(READ OUT STATEMENT). Would you be willing to spend a lot more, a little more or not spend anything extra at all?

Economic
Beneficial to the local / UK economy .....[ ]

Environmental
From a sustainable source e.g. a type of fish that wasn't declining in numbers[ ]

Social
Fair Trade i.e. ensures a fair deal for producers in developing countries.....[ ]

D. TRADE-OFFS

Q9 I'm now going to ask you to read about some different issues. For each of the issues, I would now like you to imagine that you have 6 points to choose from to indicate which one you prefer and by how much.

INTERVIEWER NOW SHOW EXAMPLE ON SCREEN:

If you prefer option 1 you would select one of the boxes on that side i.e 1, 2 or 3, while if you prefer option 2 you would select one of the boxes on the other side i.e. 4, 5 or 6. The stronger you prefer an option, the more you will choose a number further to that side i.e. if you strongly favoured option 1 you would choose 1, whereas if you only slightly favoured option 1 you might choose 3.

OPTION 1	VS	OPTION 2

1	2	3		4	5	6

FOR ALL EXERCISES ALLOW BUT DO NOT SHOW 'DON'T KNOW' ANSWER

OPTIONS A AND B WILL BE ROTATED ACROSS INTERVIEWS

1. Health vs. Environment

Eating two portions of fish, including a portion of oily fish (e.g. salmon, mackerel etc) a week helps to keep us healthy. However, numbers of many types of fish are under threat and could be destroyed completely if fishing continues at the rate it is. Which number would you choose?

A. Option to eat wide variety of fish but fish stocks continue to diminish	VS	B. Protect fish stocks but less fish varieties available to eat

1	2	3		4	5	6

2. Health vs. Consumer choice

One of your favourite sweet products has been found to be a possible choking hazard for small children and the manufacturers therefore need to decide on an appropriate course of action to take. Which number would you choose?

C. Sweet product to be kept on shelves but with warning notice on label	VS	D. Product removed from shelves completely

1	**2**	**3**		**4**	**5**	**6**

3. Health vs. UK Industry/economy

Eating too much salt in our diet is bad for us as it can raise our blood pressure and increase the chance of developing heart disease. Three-quarters of the salt we eat is in the food we buy so it is hard to be sure whether we are eating too much. Reducing levels of salt in food is expensive and could result in high costs to UK Industry and subsequently effect profitability and jobs. Which number would you choose?

E. Reducing salt levels but increasing costs (risking profitability and jobs)	VS	F. Keep current salt levels as they are

1	**2**	**3**		**4**	**5**	**6**

4. Consumer Information/Choice vs. Environment

Consumers today enjoy a wide variety of choice of fresh fruit and vegetables, some of which are flown in from distant parts of the world e.g. strawberries or green beans in the winter. However, air transport produces a lot more greenhouse gas emissions compared to other forms of transport and so contributes to global warming and climate change. Which number would you choose?

G. Less choice of fruit and vegetables at certain times of the year but reduced air transportation	VS	H. Lots of choice of fruit and vegetables all year round but with existing levels of air transportation

1	**2**	**3**		**4**	**5**	**6**

5. Environment v UK Industry & Economy

Palm oil is widely used in the UK food industry (found in products such as chocolate, biscuits and crisps) but its production is damaging to endangered species in rain forests. Unfortunately, alternatives to palm oil would cost the food industry a lot more money and so make it less profitable and cause potential job losses. Which number would you choose?

I. Reduced use of Palm Oil to alleviate plight of endangered species in rain forests but increasing cost (risking profitability and jobs)	VS	J. Continued use of Palm Oil at current levels with no increases in costs

1	**2**	**3**		**4**	**5**	**6**

6. Consumer information & Choice v UK Industry & Economy

Providing information to consumers about the country of origin of food they buy is fairly straightforward for single ingredient products such as a tomato. However, it's much more difficult and expensive to provide this information for products made from a variety of ingredients such as tomato ketchup where the label would have to change whenever the recipe changed or ingredients where sources were from a different country. Which number would you choose?

K. Detailed country of origin labelling on multi-ingredient products but increasing costs (risking profitability and jobs)	VS	L. No detailed country of origin labelling on multi-ingredient products

1	**2**	**3**		**4**	**5**	**6**

OTHER SD ISSUES

Q10. Overall, what, **IF ANYTHING,** does sustainable development mean to you in the context of food? **PROBE FULLY – DO NOT PROMPT AND CODE BELOW ROTATE LIST**

Not wasting food 1
Reducing greenhouse gases 2
Protecting the environment 3
Lower food miles / air transportation 9
Sustainability of food source/stock levels e.g. numbers of fish diminishing 11
Fair trade / impact on the community where food comes from 12
Amount/type of packaging used 14
Healthier food 17
Free-range / organic food 19
Seasonality of food 20
Supporting the local /UK farmers 21
Food available now and in the future

Other (please specify) 22

Q11. Which of the following statements do you most agree with?

SHOW SCREEN

FLIP SCALE SO HALF SAMPLE SHOWN 1-3 IN THAT ORDER AND THE OTHER HALF 3-1 IN THAT ORDER

I'd rather all food produced that gives less consideration to animals / the environment was not available, even if this meant less food choice for me 1

I'd like my **supermarket/shop to provide information** on the food that I buy, so I can judge its effect on animals / the environment before I buy it (even if this means lots of information) 2

I'd **rather not know** if the food I buy is harmful to animals / the environment . 3

Other (specify) 4

Don't know 5

TNS Omnimas – Demographics

Gender:	Male	Female
Age:	16-24, 25-34, 35-44, 45-54, 55-64, 65+ Exact age is recorded so any other grouping can be provided	
Social Grade:	A B C1 C2 D E	
Status:	Chief Income Earner Principal Shopper	Other Male Other Female
Marital Status:	Married/Living as married Single	Widowed/Divorced/Separated
Working Status (of respondent):	Full time (30 hrs +) Part time (8-29 hrs) Part time (below 8 hours) Retired	Still at school In full time higher education Looking for work Not looking for work (not student/retired)
Household Size & Composition:	Total people in household up to 5+ Total adults in household up to 5+ Total children 0-15 in household Child in household, no child in household Child aged 0-2, 3-5, 6-9, 10-15 Exact age and gender of each child is recorded, so other groupings can be provided	
Region:	ITV Regions (overlap or non-overlap) Government Regions North/Midlands/South Urban/rural	
Tenure:	Own outright Buying on mortgage Other	Rent from local authority Rent privately
Telephone:	Has telephone	No telephone
Internet:	Access at home Access elsewhere	Access at work No internet access
Cable/Satellite/ Digital TV:	Any Cable or Satellite Other Multi-channel	Any Digital None
Ethnicity:	White British, White Irish, Any other white background, White and Black Caribbean, White and Black African, White and Asian, Any other mixed background, Indian, Pakistani, Bangladeshi, Any other Asian background, Caribbean, African, Any other Black background, Chinese, Any other, Refused	

Appendix 3 – Omnibus methodology

TNS OMNIBUSES RANDOM LOCATION SAMPLING METHODOLOGY

The TNS Omnibuses employ a random location methodology each week. A varying number of sampling points are issued depending upon the length of the questionnaire. The number of Great Britain sampling points issued can be 143, 126 or 112 and corresponding sampling points in Northern Ireland are 4, 4 or 3. The points used are sub samples of those determined in a sampling system developed by TNS for its internal use.

i. Sampling Frame

2001 Census small area statistics and the Postcode Address File (PAF) were used to define sample points. These are areas of similar population sizes formed by the combination of wards with the constraint that each point must be contained within a single Government Office Region [GOR]. In addition, geographic systems were employed to minimise the drive time required to cover each area as optimally as possible.

600 points were defined south of the Caledonian Canal in Great Britain [GB]. Another 25 were defined in a similar fashion in Northern Ireland. Finally 5 points were defined north of the Caledonian Canal. These latter differ in size from the other points and each other to meet the need to separately cover the different parts of the Highlands and Islands.

ii. Stratification and Sample Point Selection

285 points were selected south of the Caledonian Canal for use by the Omnibuses after stratification by Government Office Region and Social Grade. They were also checked to ensure they are representative by an urban and rural classification. Those points are divided into two replicates. One set are used in one week. The other set are used in the next week. One of the points north of the Caledonian Canal is also used. 16 of the points in Northern Ireland are selected and divided into four replicates. Those replicates are used in rotation to give a wide spread across the Province over time. Similarly the statistical accuracy of the GB sampling is maximised by issuing sequential waves of fieldwork systematically across the sampling frame to provide maximum geographical dispersion. This ensures that the sample point selection remains representative for any specific fieldwork wave.

iii. Selection of Clusters within Sampling Points

All the sample points in the sampling frame have been divided into two geographically distinct segments each containing, as far as possible, equal populations. The segments comprise aggregations of complete wards. For the Omnibuses alternate A and B halves are worked each wave of fieldwork. Each week different wards are selected in each required half and Census Output Areas selected within those wards. Then, groups of OAs containing a minimum of 125 addresses are sampled in those areas from the PAF.

iv. Interviewing

The addresses, selected as above, are issued to achieve an adult sample of 15, 17 or 19 interviews in provincial areas and 13, 15 or 17 in London depending upon the questionnaire length. Assignments are conducted over two days of fieldwork and are carried out weekday 2pm-8pm and at the weekend. Quotas are set by gender/housewife. Within female housewife presence of children and working status is set, within men working status is set to ensure a balanced sample of adults within effective contacted addresses. All interviewers must leave 3 doors between each successful interview.

v. Respondent distribution (key subgroups only)

	Unweighted base (# of respondents)	Weighted base (000's of adults)
England	**1756**	**40618**
Scotland	155	4100
Wales	97	2407
N Ireland	60	1099
Urban	1572	36650
Rural	436	10475
AB	375	9997
C1	491	13364
C2	441	9535
DE	761	15327
Married	1186	27376
Single	510	13110
Divorced	372	7738
Working	913	23505
Not working	1155	24720
Children in household	616	15107
No children in household	1452	33118
1 person household	441	9372
2 people in household	750	16749
3 people in household	352	8839
4 + people in household	525	13264
Principal shopper	1418	31816
HH food spend per week:		
Less than £25	164	3490
£25-£49.99	572	12769
£50-£74.99	607	13974
£75-£99.99	312	7716
Over £100	267	6645