

Attitudes and Behaviours around Sustainable Food Purchasing - EXECUTIVE SUMMARY

Report (SERP 1011/10)

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EXECUTIVE SUMMARY

Defra published its Business plan in November 2010. The first of the Structural Reform Priorities outlined in the plan is to support and develop British farming and encourage sustainable food production. Defra is therefore aiming to re-engage consumers with their food and to increase their confidence in it and its supply chain.

Understanding the link between attitude and behaviour towards sustainable food is likely to be a critical part of understanding how to strive for a sustainable food system. Understanding what drives the purchasing behaviour of consumers, and how it is influenced by consumer attitude, will be a step towards formulating policy aimed at securing a sustainable food system.

There is evidence on consumer attitudes towards sustainable food and also evidence on consumer purchasing patterns. Using new data on attitudes and behaviours from a single source, this project aims to draw direct comparisons between the two, investigating how attitudes translate into behaviours.

The project has two main aims:

1. To inform the indicators which track progress towards the goals set out in the Food Strategy(Defra, January 2010).
2. To inform Government policy on where the gaps are between attitude and behaviour towards sustainable food, and shed light on barriers and drivers and how these may differ between demographic groups.

Six themes were selected for the project to cover the full range of issues related to sustainable food: animal welfare, British seasonal production, ethical production, healthy balanced diet, sustainably sourced fish and environmental sustainability. The themes were chosen using the following criteria:

- If it is an issue that consumers could chose to support through their purchases
- If it is an issue raised in 'Setting the Table' (Sustainable Development Commission, December 2009)
- If the theme was within the Food Strategy (Defra, January 2010) as an area where consumers can make a difference

Defra purchased data on 3000 households for the project from Kantar which can be defined in four parts:

1. Demographic data about each household.
2. Attitude data from a Defra designed on-line questionnaire.
3. Purchases data covering a year from barcode scanned food shopping.
4. Energy and nutrient data derived from the purchases data.

The project provides real evidence of the link between attitudes and actual purchasing behaviours. It contains a wealth of statistics that can be used by policy makers. For animal welfare, it tentatively places groups of people on an engagement scale but has stopped short of suggesting an indicator of engagement. Many possibilities for further analysis within the data underlying the project are discussed.

Attitudes

Key to the project is to link attitudes and behaviours together and find out the extent to which attitude is translated into purchasing behaviour. We get an insight into this by focusing on three aspects:

- how important the issue is to the consumer
- does the consumer actively seek the more sustainable produce
- the percentage of purchases that are of products identified as being more sustainable.

The gap we target is that between motivation and actual purchasing behaviour. We do not attempt to estimate the gap between stated behaviour and actual behaviour. This would be perhaps impossible or at least very difficult to do in practice, given that respondents to the attitudinal questions were fully aware that all their purchases had been recorded.

The percentage of households who rated each of the issues as important are shown with the percentage claiming to actively seek to buy specific products related to the issue.

Theme	Important issue ¹	actively seeking
	% of households	
Animal welfare: eggs	76	65
Animal welfare: chicken		50
British seasonal	67	72
Ethical production	65	29
Healthy balanced diet	81	82
Sustainably sourced fish	70	30

¹ 'quite important' or 'very important'

All of the themes are rated as important by high levels of households but there are differences. Healthy balanced diet is rated the highest with 81% classing it as important while ethical production and British seasonal produce are rated the lowest.

Many households claim to actively seek to buy healthy foods, 82%; and British seasonal produce, 72%. Free range eggs come next with 65% actively seeking. Only 30% claim to actively seek sustainably sourced fish, and only 29% claim to actively seek fairtrade coffee and tea.

For attitude to environmental sustainability respondents were asked 17 golden questions and using the Defra pro-environment segmentation model on this data suggests that the numbers of "concerned consumers" is 26% of the population and that the numbers of "honestly disengaged" is 28%.

Purchasing Behaviour

Comparing these criteria with actual purchasing behaviour is where the project provides its real value. Actual behaviour is summarised in the table below covering the themes of animal welfare, British seasonal, ethical production and healthiness.

Purchasing Levels and Importance of Issue

	importance of issue	
	higher	lower
eggs (%free range)	50	22
chicken (%free range)	8	2
strawberries in season (%British)	72	72
apples in season (%British)	20	12
tea and coffee (%fairtrade)	7	4
5 A DAY (portions per day)	2.4	1.7
sodium (grams per person per day)	2.37	2.32
sat fat (% of energy intake)	14.6	15.0

Rating an issue as important or very important is associated with more purchases of sustainable produce.

- 0.7 portions of 5 A DAY more for those rating healthy balanced diet important.
- Over twice the proportion of free range eggs for those rating animal welfare important.
- Over 3 times the proportion of free range chicken for those rating animal welfare important (but still only 8%).
- Strawberry purchases unaffected by importance attached to the British seasonal issue.
- More sodium if you rate healthy balanced diet as important.

Purchasing Levels and Actively Seeking

	Higher importance		Lower importance	
	actively seeking		actively seeking	
	Yes	No	Yes	No
Animal welfare				
eggs (%free range)	58	15	51	12
chicken ¹ (%free range)	11	3	3	2
British Seasonal				
strawberries (%British)	72	71	72	72
apples (%British)	21	16	13	12
Ethical production				
ethical (%fairtrade)	12	5	11	3
Healthy balanced diet				
5 A DAY (portions per day)	2.5	1.9	2	1.6
sodium (grams per person per day)	2.37	2.38	2.31	2.33
Saturated fatty acids (% of energy intake)	14.6	14.6	15	15

Respondents were asked if they actively seek to buy particular types of product related to the issues. The actively seek question was specific to the product monitored in the purchases data apart from chicken, apples and strawberries. For chicken the actively seek question was for free range or freedom food chicken while the purchases data identified only free range chicken. For apples and strawberries the actively seek question was about all in-season British fruit and vegetables.

¹ Respondents were asked whether they actively seek to buy free range chicken or freedom food chicken

Claiming to actively seek is the best determinant of behaviour for some items:

- Four times the proportion of free range eggs.
- Two to three times the proportion of fairtrade tea and coffee.

Importance given to the issue is the key determinant of behaviour for some items:

- Importance given to a healthy balanced diet is associated with lower levels of saturated fatty acids.
- Sodium content of purchases was actually higher for those citing healthy balanced diet as important – a key determinant but in the wrong direction.

Actively seeking and giving importance to the issue is the key determinant of behaviour for some items:

- The proportion of apples bought in the British season that that are British is highest among those who both rate British seasonal fruit and vegetables as important and claim to actively seek to buy.
- The highest number of 5 A DAY portions is by those who rate a healthy balanced diet as important and claim to actively seek a healthy balanced diet.
- The proportion of chicken that is free range is far higher among those rating animal welfare as important and claiming to actively seek to buy.

Neither importance nor claiming to actively seek helps for some items:

- The purchasing rate of British strawberries is not improved by rating British seasonal produce as important or by claiming to actively seek to buy British fruit and vegetables.

This has not yet been done for the fish theme where further work compiling lists of bar codes of MSC products is required (Marine Stewardship Council).

Barriers and Drivers

Respondents were asked to select potential barriers and drivers from a list provided on the questionnaire. Most frequently mentioned were that products were too expensive, or simply not chosen out of habit, while taste was often mentioned as a driver.

The main drivers for animal welfare were, 'wanting to be humane to animals' and taste, with taste being cited by 49%. Taste is also a driver for purchasing British seasonal produce, but not for purchasing fairtrade tea and coffee. The largest barrier for buying British in season produce is, 'wanting a wide choice'; 38% of those not actively seeking cited this as a barrier. When it comes to a healthy balanced diet, 30% of those not actively seeking healthy food thought healthy food was too expensive while 46% of those seeking healthy foods were motivated by healthy foods not being too expensive. For sustainable fish 37% had not heard of MSC.

Segmentation of the animal welfare theme

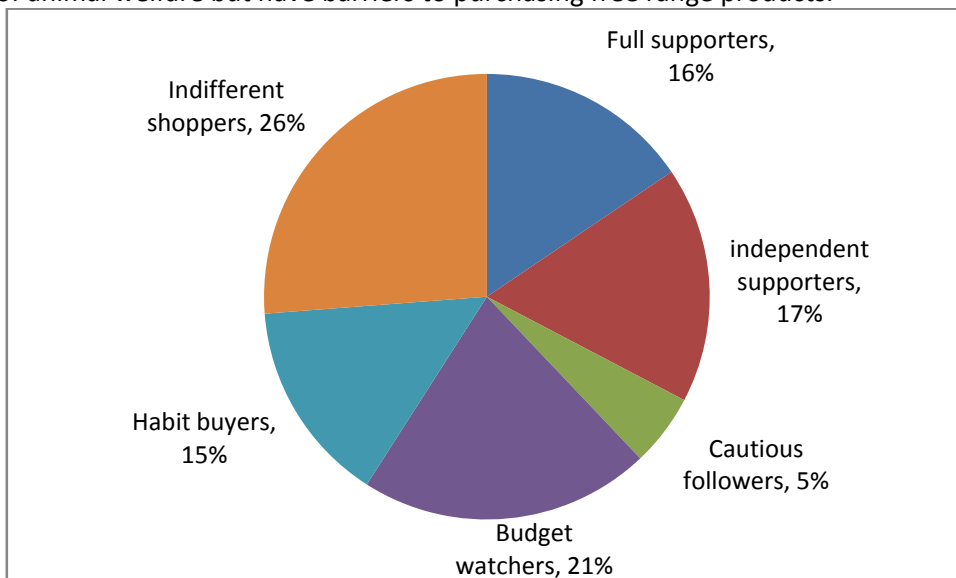
The animal welfare segmentation analysis split the respondents in to 6 separate segments:

1. **Full supporters:** Buys free range, good understanding, rates issue important
2. **Independent supporters:** Similar to 'Full supporters' but don't feel as strongly or purchase as much.
3. **Cautious followers:** Buys some free range but unsure about the ethics
4. **Budget watchers:** Animal welfare is important but can't afford to buy free range

5. **Habit buyers:** Can afford to buy free range but not in the habit of doing so
6. **Indifferent shoppers:** Is not concerned about animal welfare and buys little free range

Segmentation analysis was chosen as a means of distilling down the large volume of data to form groups of the population that are defined by their attitude, behaviour and demographics. We used multivariate statistical techniques to examine all of the attitudinal questions and some of the key behavioural information simultaneously. The aim was to find groups or clusters of households that exhibit similar patterns.

The six identified segments were placed on the engagement scale. Full Supporters and Independent Supporters could be viewed as being engaged with the issues giving an estimated 33% of the population as engaged. At the other end are Indifferent Shoppers, an estimated 25% of the population, are not engaged with the issues of animal welfare. Cautious Followers, only 5% of the population, are near the bottom of the scale because of a lack of understanding of the issues, although they are driven by taste to purchase some free range products. Budget Watchers and Habit Buyers, making 36% of the population, have good awareness and understanding of the issues of animal welfare but have barriers to purchasing free range products.



The segmentation analysis provides estimates of the extent to which each segment responded positively to each of the attitude questions and how they performed in terms of purchases. Details are shown in the main report to reveal the key aspects that distinguish each of the segments.

The animal welfare segmentation can be cross linked with the Defra pro-environmental segmentation. To a large extent those who were classed as cautious followers and indifferent shoppers in terms of animal welfare tend to be honestly disengaged in terms of the Defra pro-environmental segmentation. Demographic characteristics of the animal welfare segments are also analysed in the main report.