What Does Sustainability Mean To The Consumer?

Primary Qualitative Research 2013

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Background and aims

- To ensure our Members stay in touch with the consumer perspective, the Strategic Insight Team devised a forum project based on a programme of market research to consumers' attitudes and behaviours to sustainability.
- The term 'sustainability' is a complex term that is not easily understood by the consumer. Understanding ranges from the conventional – "*replaceable", "food security"* and "*matching demand"*, to satiety related – "*fuller for longer"*, "*nutrient dense"* and "*filling"/"sustain you 'til lunch",* and "*belief in yourself"* or "*being successful".* The topic of sustainability had to be tackled in a subtle and indirect way to ensure the consumer fully understood what was meant by sustainability and to minimise 'right' response answers.

Methodology

- Two 90-minute focus groups were conducted at Leatherhead and recruited using Leatherhead's Sensereach™ database.
- One group of older respondents (45-65 years), included a mix of empty nesters, plus those whose adult offspring had either not left home or had returned after university.
- One group of younger respondents (20-44 years); included a mix of young families, those living at home and in shared accommodation.
- All respondents were recruited based on their interest in a range of environmental issues (the meaning of 'interest' was left to the respondents' individual interpretation).
- Only those who showed at least some interest, but not extreme interest in environmental issues, were invited to attend the group (i.e. when questioned, they rated between 3 and 8 on a scale of 1-10 where 1= not at all interested and 10 = extremely interested)

NB: all text in speech marks are direct quotes from the consumers

Results

Associations with the term sustainability

Each individual's personal understanding and unbiased interpretation of the term sustainability was captured before the creative discussion:
The majority of consumers were "*positive*". The older group also cited "*intrigued*" or "*anxious*" whilst the younger group claimed to be "*excited"* or "*anxious"*



MOST 1st associations *"The future, long term"* *"Long lasting"* *"Resources left and kept for the future"*

OLDER group *"Old-style farming"* *"Organic farming"*

YOUNGER group *"Belief in yourself"* *"Being successful"*

Figure 1: Consumers' spontaneous associations with the term sustainability

Reactions to definition of sustainability

Initial reactions were encouraging, with 'murmurs' of approval. Then with consideration, reactions conveyed scepticism about being aspirational or idealistic. Finally, some cited "*contradictions*" if the definition of sustainability was truly fulfilled.

Initial reaction: *"I was quite impressed"* *"All encompassing and positive"* *"Ticks all the boxes"* *"Spot on"*

Considered reaction: *"It's a feel-good factor really"* *"More aspirational, not realistic … but it would be great if it could"*

Deliberated reaction: *"Sustainability is often used against GM, which might be the solution"* *"Local production can use more resources and energy than importing"*

Figure 2: Reactions to a definition of sustainability

Older respondents thought "*a fair price"* and "*animal welfare"* were missing from the definition, whilst younger respondents' concerns lay with who would take responsibility for achieving this.

Consumers views of a company's sustainability centred on packaging

Consumers question companies' and governments' commitment to sustainability. Older and younger respondents showed cynicism regarding the actions and motives of companies and supermarkets – "*Is it just to charge us more or do they genuinely want to source locally?… They destroy our local shops and give local back at a premium price".*

High quality products are typically perceived as a mark of sustainability

Consumers recognised that a company's sustainability differentiator was actually perceived quality. Many large household brands were considered less likely to embody sustainability, seen as motivated to behave sustainably only to further profits and the nature of the brand's main products would influence/skew their sustainability credentials.

Consumers aren't prepared to pay for sustainable products, and sustainability logos rarely drive consumer purchase decisions

Sustainability appears to be a passive subject area – the concept is certainly liked and accepted, but just not actioned by most. It does not compare favourably with other consumer food concerns – "*It's not up there at the front of your mind like salt, price, quality because it's confusing".* Moreover the personal cost of adopting sustainable practices is seen as a big prohibitive factor – "*It's like organic, it's lovely as long as you've got lots of money!"*

Both groups *"Very recognisable … lots of TV programmes about it … I like the ethics … some products really don't taste good … taste is the bottom line"*

YOUNGER group *"On timber, paper and toilet roll … it's on most things … wouldn't encourage me to buy it"*

OLDER group *"I'm not sure what the tractor means – it's UK meat I think?"*

Figure 3: Logos spontaneously recalled relating to sustainability



KEY MESSAGE: Educate through positive future vision not shock tactics and activate interest through consumer-friendly terms, trust and belief

Positive information would motivate consumers' own sustainable efforts
"Shock tactics only work momentarily and to marginal effect …
In contrast Fairtrade has a positive outlook and has gained momentum over time"
Consumers want simplicity and also need to know what is in it for them
"We need a legitimate, certified overarching logo … The problem has to touch you personally"

