Market Research on Customers' Awareness, Opinion and Understanding of Ethical Labels in South Africa
Results

Specially prepared for:

BTC TRADE FOR DEVELOPMENT

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Smart Data for Smarter Decisions™

Discussion points

- Introduction and Background
- Research Objectives
- Profiling South African Green Consumers
- Research Methodology
- Empirical Results
- Key Takeouts

Introduction and Background

BTC TRADE FOR DEVELOPMENT

The Trade for Development Centre

The Trade for Development Centre (TDC – www.befair.be) of the Belgian Development Agency (BTC) promotes fair and sustainable trade.

In developing countries, TDC aims to economically and socially empower MSMEs (micro, small and medium-sized enterprises/organisations) **by enhancing their business and marketing knowledge and improving their access to markets**. This is done by conducting market researches allowing these MSMEs to better understand and capture market opportunities, be it nationally or internationally. These market studies are either used directly by MSMEs or by partner organisations (business support organisations, certification bodies, producer networks, etc.) in their day-to-day work to strengthen these MSMEs. Additionally, with its producer support programme, TDC provides financial and marketing assistance to MSMEs.

Lastly, TDC closely observes the evolution of sustainable markets to inform authorities, civil society, consumers and other economic actors as objectively as possible on the relevance and potential of sustainable trade in Europe and in the South.

The changing ethical consumer landscape in South Africa

Green consumerism, which is the notion of **sustainable consumer behaviour, is on the increase globally, but not equally in all countries and regions.** Green consumerism refers to ethical consumption which is the purchasing of products which uphold certain ethical standards, such as fair labour conditions; human rights; environmental protection; animal protection; etc..

Ethical consumption therefore encompasses various dimensions as this may benefit the environment or people or both:

- Environmental protection:
  Environmentally friendly products, legally logged wood, animal well-being etc..
- People (employee) protection:
  Fair labour practices, no child labour, safe working environments etc..
- People (consumption) protection:
  Organic products which are environmentally friendly to produce and safer to consume.
- Country of origin concerns:
  Supporting local communities and trade to uplift disadvantaged communities.

(Carrington; Neville, Whitwell, 2009; Pelsmacker; Driesen; Rayp, 2005)

BTC TRADE FOR DEVELOPMENT

The changing ethical consumer landscape in South Africa

An increasing number of studies indicate that South African consumers have high levels of ethical purchasing intention, however, there seems to be a **discrepancy between this intention and the actual purchasing behaviour within the marketplace**.

This discrepancy may be due to an **idealistic view of the world which does not align with the realistic living/ working/ marketplace conditions of a developing country** as well as socially desirable values distorting actual purchases.

- **Brands and loyalty:** South African consumers demand change and relevance from brands and loyalty is no longer assured. Consumers demand **authentic relationships**, dialogue, experiences and a **commitment to sustainability and governance**. South Africans have high expectations for 'operational responsibilities', which means that, in addition to companies showing they have **invested in the community**; consumers want to know more about the local context and impact of production.
- **Macro-economic and social trends:** A unique social and political environment in South Africa, in the context of continuing global economic pressures creates a unique challenge for brands. The **balance between affordability and brand loyalty or relevance** creates opportunities for producers in the ethical branding landscape.

The changing ethical consumer landscape in South Africa

Before better understanding the **ethical consumption behaviour** of South African consumers, one must better understand their **purchasing decision behaviour,** of which **labels** play an integral, extrinsic part.

There are three broad categories of decision-making, namely routine-; limited-; and extensive decision-making, which is **influenced by how important, expensive and technically complex a product is**, as well as the experience a consumer has had with the product category.

To assist them in the decision-making process, consumers will actively **search for information** to **simplify** this process and make a satisfactory purchase decision, especially in the **cluttered market** environment of local and foreign brands. Within the **information search stage**, consumers will refer to **labels** as an external information source.

Product labels must therefore portray **relevant** and **accurate** information in order to assist consumers in their purchasing decisions. Consumers must be able to **easily read**, **understand** and **interpret** all of the label information in order to appropriately react to it.

Labuschagne et al., 2012; Omotosho, 2011
Schiffman & Kanuk, 2010:481; D'Souza, Taghian & Lamb, 2006

Introduction and Background

The changing ethical consumer landscape in South Africa

To better understand the ethical consumer landscape within South Africa, it is important to understand the South African consumer landscape in general:

SA population:

55.91 million people

51% Female

Regions (largest populated):
- Gauteng: 13.5 million
- KZN: 11.1 million
- Eastern Cape: 7 million

Race
- Black: 80.7%
- Coloured: 8.8%
- Indian/ Asian: 2.5%
- White: 8.1%

STATS SA: Mid-year population estimates, 2016

Employment:

9 690 000 employed
(based on December 2016 figures)

STATS SA: Quarterly employment statistics, Q4 2016

Tourism industry:

Tourism is a key contributor to South Africa's GDP

711 746 South Africans are employed in the tourism industry.

1 in 22 employed individuals work in the tourism industry (4.5% of total workforce).

Tourism employs more workers than the mining industry.

Tourism jobs are mainly in:
- Road transport (29%)
- Food and Beverages (20%)
- Accommodation (19%)
- Retail (16%)

STATS SA: Tourism Satellite Account for South Africa, 2015
(Tourism: Jobs, the economy and spending)

South African's living conditions:

Living in formal dwellings: 78.1%
Access to piped water: 89.4%
Electricity: 85.5%
Sanitation: 80%

Inadequate access to food: 22.6%
Unemployment rate: 26.5%

STATS SA: General household survey, 2015

Agricultural households

(households producing any kind of food or agricultural products)

2.3 million
- KZN: 23%
- Eastern Cape: 21.3%
- Limpopo: 16.6%

STATS SA: Community Survey 2016, Agricultural households, (PJ Lehohla)

Research Objectives

The primary aim of the study is to promote Fairtrade and ethical consumption in South Africa. The study's objectives therefore include:

- Unpack the current market trends and dynamics within the South African market. Market trends illustrate what the current trends are and what consumers are spending their money on.
- Profile consumers in the different categories. This would help to identify the kind of individual who would normally purchase Fairtrade, ethical and/or sustainable products as well as the complete funnel from awareness to trial to different usage profiles. This would also entail a quantification of the barriers in the transition to each stage.
- Understand purchase and usage dynamics. This would give an understanding into consumers' buying behaviour including their normal usage / retailing experiences as it relates to the category.
- Understand the interaction between the different decision-makers and influencers for Fairtrade branded and non-branded products.
- The barriers and drivers of purchase behaviour and differences between consumer profiles and the relative contribution of these variables to identify the most valuable actions for organisations promoting ethical products in SA.

Profiling South African Green Consumers

Summary

When looking at the section of the population who would **choose to buy Fairtrade products when they are available** – they are more likely to be **females**, **older than 50 years** of age, **Coloured** and live in the **Western Cape or Northern Cape**.

The **majority of the South African population**, as well as the main shoppers (shoppers who personally select 50% or more of what is bought) are neutral greens. They are **aware of environmental issues and will buy into green initiatives, but only if they offer functional benefits too.**

Focussing on consumers who are the **most passionate green consumers, who will go out of their way to help tackle climate change and pay a premium for eco-friendly products** (Engaged Greens) as well as those who **care about the environment and would like to adopt more sustainable habits, but won't make big sacrifices in terms of price, comfort or convenience** (Green Supporters) – a greater proportion are **LSM 8 – 10**; reside in **Cape Town, Mangaung and Tshwane**; and tend to be **Coloured or White**.

Profiling South African Green Consumers

Summary

46% of the South African population state they **will never buy toiletries and cosmetics that have been tested on animals**. When looking at the section of the population who would mostly make this statement, they are **LSM 8 – 10**, **Coloured** or **White**, living in **Mangaung,** irrespective of age and gender.

A smaller percentage of the general South African population stated that they **regularly buy organic products** – organic meats (20%); organic dairy (22%); organic fruit and vegetables (26%).

- South Africans who will purchase **organic meat more often** are **LSM 10**, between **25 – 49 years of age**, **White**, living in the **City of Tshwane**, irrespective of gender.
- South Africans who will purchase **organic dairy products more often** are **LSM 10**, **White**, living in **Mangaung**, irrespective of age and gender.
- South Africans who will purchase **organic fruit and vegetables more often** are **LSM 10**, between **35 – 65 years of age**, **Indian/ Asian** or **White**, living in **Mangaung**, **Ethekwini** or **Ekurhuleni**, irrespective of age and gender.

21% of the South African population state they **regularly buy Free Range.** When looking at the section of the population who would mostly make this statement, they are **LSM 10**, **25 – 65 years of age**, **White**, **Black**; **Indian/ Asian**, living in **Mangaung,** irrespective of gender.

Profiling South African Green Consumers

Summary

The proportion of consumers who believe **South African goods** are usually of **high quality** (48%) is **slightly higher** than those who believe the **quality is usually not good enough** (44%).

When focussing on consumers who say agree to **"prefer to buy South African but the quality of South African goods is usually not good enough"** – they are likely to be **LSM 10**, **50 – 65 years** of age, **male**, **Indian/ Asian** or **White**, living in **Ethekwini**.

A wider range of consumers tend to think the **quality of South African goods are high**, with them also being mostly **LSM 10**, aged **35 – 65 years**, **White** or **Coloured**, living in **Mangaung** irrespective of gender.

PROUDLY MADE IN SA

48% of the South African population state they **buy goods produced by their own country whenever they can**. When looking at the section of the population who would mostly make this statement, they are **LSM 10**, **35 – 65 years**, **Indian/ Asian**, living in **Mangaung,** irrespective of gender.

54% of the South African population state they **like to support companies that display the Proudly South Africa Branding**. Consumers who will mostly support these companies are **LSM 8**, **50 – 65 years**, **Coloured**, living in **Mangaung**, irrespective of gender.

TGI Methodology

The global gold standard for integrated brand and media measurement

Syndicated large scale single source consumer survey, illustrating a full week in the life of your consumer

Methodology:

- 15,000 annual sample
- Enumerator Area (EA) sampling in communities 8 000+, adults aged 15+
- Weighted to STASTSA 2016C data used for the purpose of this analysis

Single Source database linking all aspects of a consumer:

- 19 product sectors
- 570+ product categories
- 8,000+ brands
- 600+ attitude statements
- 8 media types (incl. outdoor & Internet)
- Detailed demographics
- Pre-defined segmentation models (Incl. SEL)

What does TGI measure

19 Product Sectors, 570+ Product Categories

Food	Confectionery & Snacks	Holidays & Travel
Household Products	Tobacco Products	Financial Services
Pets & Pet Foods	Motoring	Communication & Internet
Pharmaceutical & Chemist	Shopping, Retail & Clothing	Appliances & Durables
Toiletries & Cosmetics	Sports & Leisure	Personal items & Electronics
Non-Alcoholic Drinks	DIY & Gardening	Government
Alcoholic Drinks		

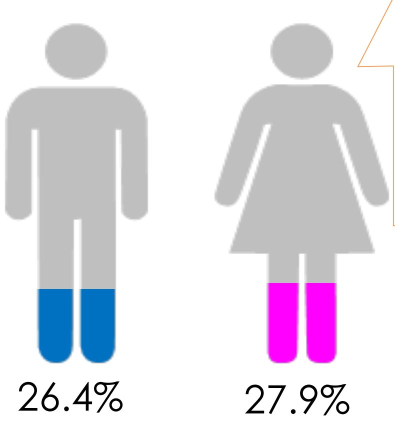
Profiles of South Africans who buy fair trade Based on TGI data

BTC TRADE FOR DEVELOPMENT

27.2% of the South African population buy fair trade products when available

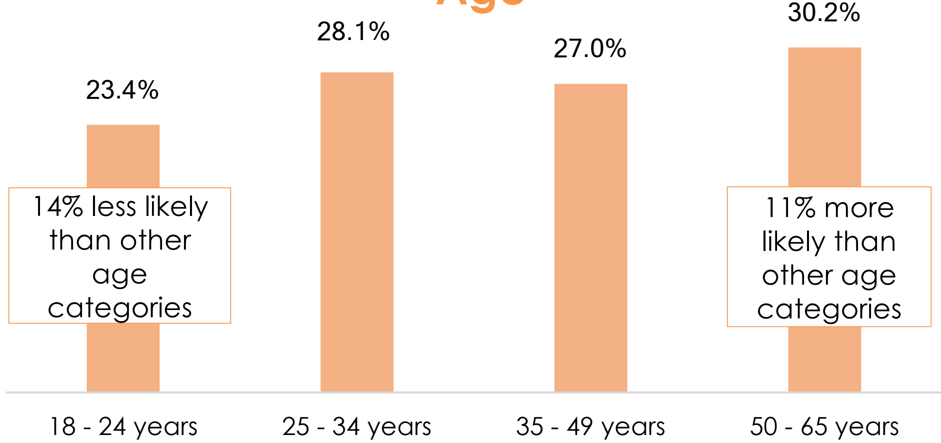
n = 4033 (respondents)
N = 6547 000 (weighted to population)

Gender



3% more likely than males to buy fair trade

Age

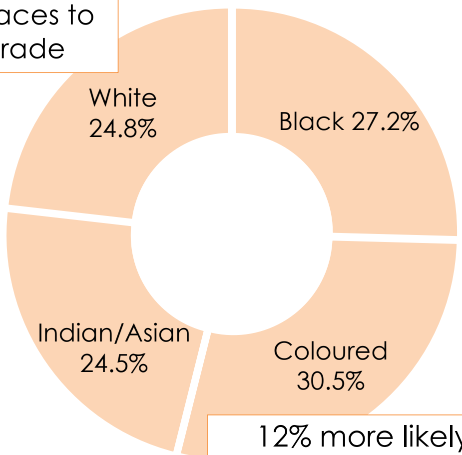


14% less likely than other age categories

11% more likely than other age categories

Race

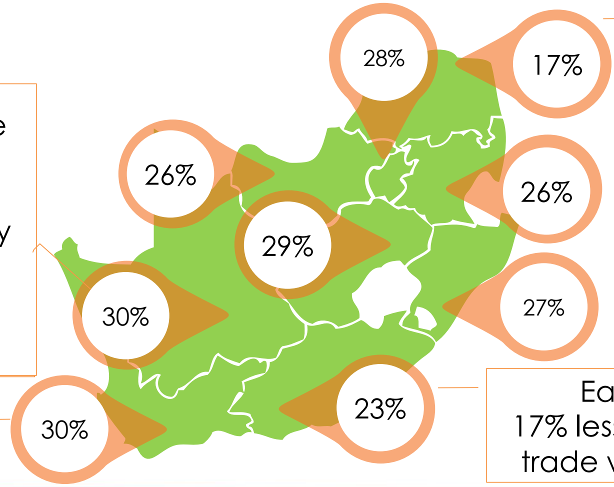
9% less likely than the other races to buy fair trade



12% more likely to buy fair trade than other race groups

Province

Western Cape and Northern Cape: 11% more likely to buy fair trade within these regions



Limpopo: 36% less likely to buy fair trade within this region

Eastern Cape: 17% less likely to buy fair trade within this region

Profiling environmentally friendly consumers
Based on TGI data

BTC TRADE FOR DEVELOPMENT

Green Values

Engaged Greens

The most passionate green consumers, who will go out of their way to help tackle climate change and pay a premium for eco-friendly products.

Green Supporters

Care about the environment and would like to adopt more sustainable habits, but won't make big sacrifices in terms of price, comfort or convenience.

Neutral Greens

Aware of environmental issues and will buy into green initiatives, but only if they offer functional benefits too.

Green Cynics

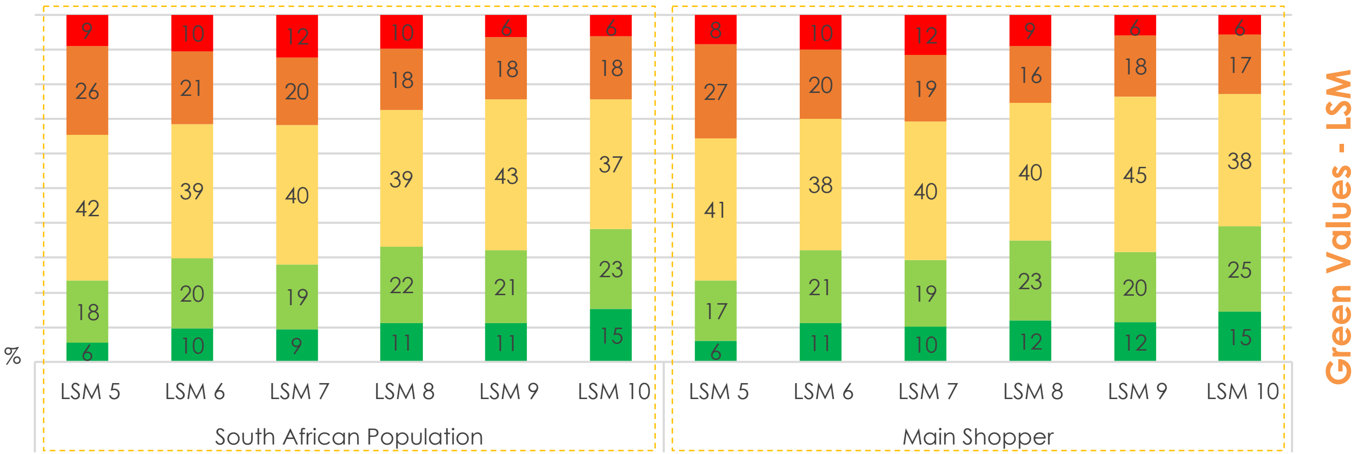
Doubtful about the value of environmental initiatives, and unlikely to choose green alternatives.

Green Rejectors

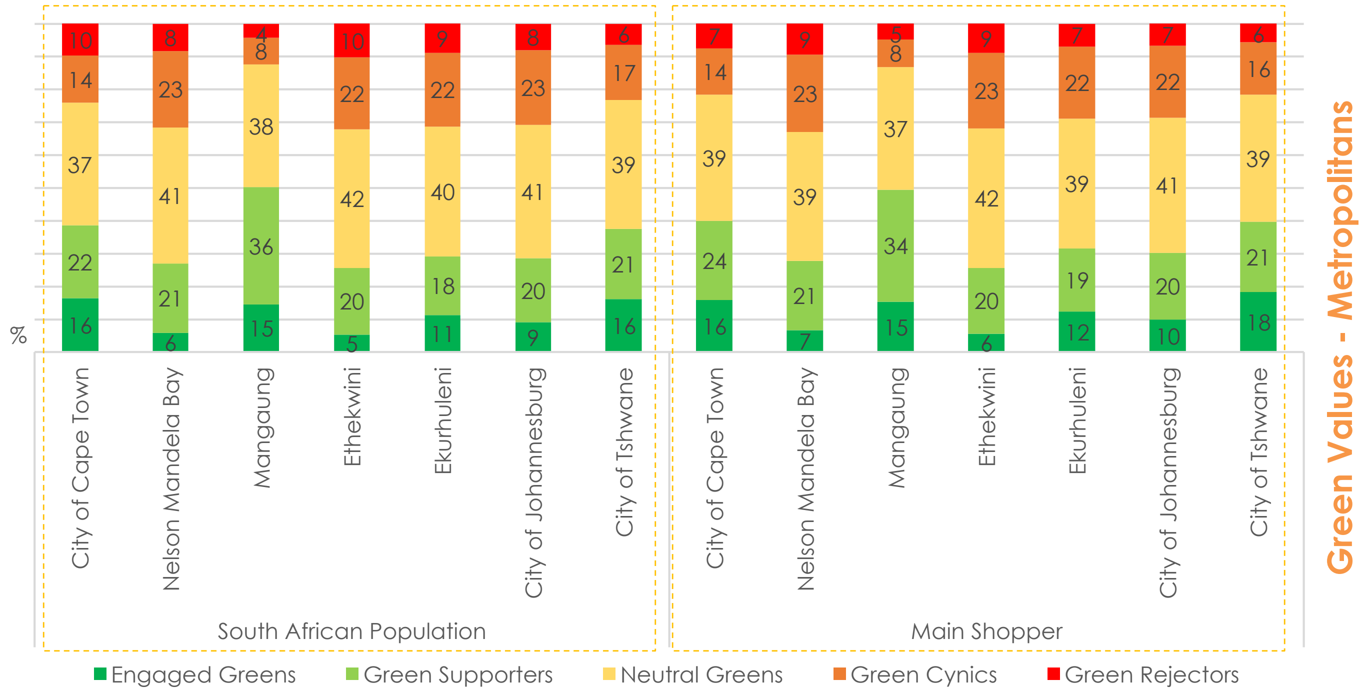
Disengaged and most likely to rebuff all green concepts.

TGI 2015B/2016A

Profiling environmentally friendly consumers Based on TGI data



The majority of the South African population, as well as the main shoppers within this population are **neutral greens**. It is further a positive indication that there is a solid proportion of Engaged Greens and Green Supporters. The main focus on LSM for retailers should be LSM 8 – 10.



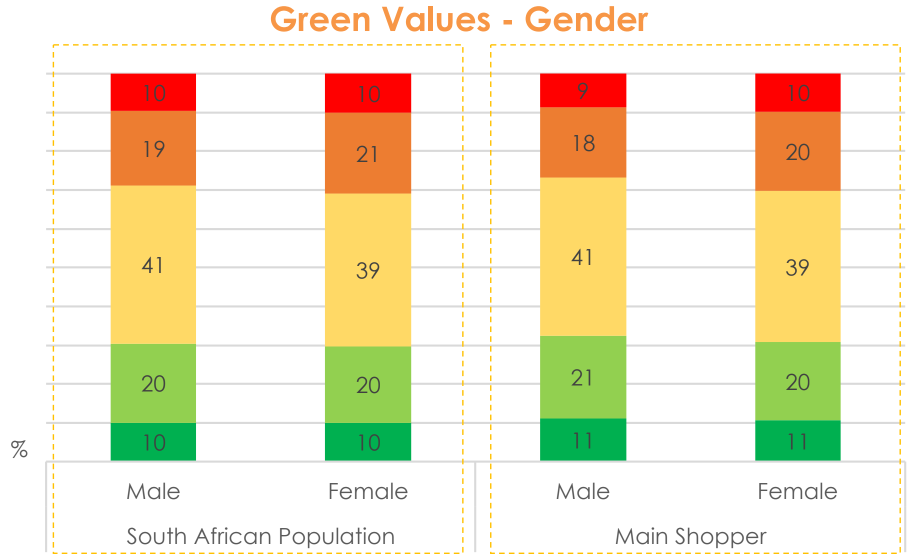
It would be beneficial to target retailers and manufacturers who cater to the **Cape Town, Mangaung and Tshwane market**, because even though shoppers within this region are mostly Neutral Greens, there is a great proportion of them who are Engaged Greens and green Supporters, especially in **Mangaung**.

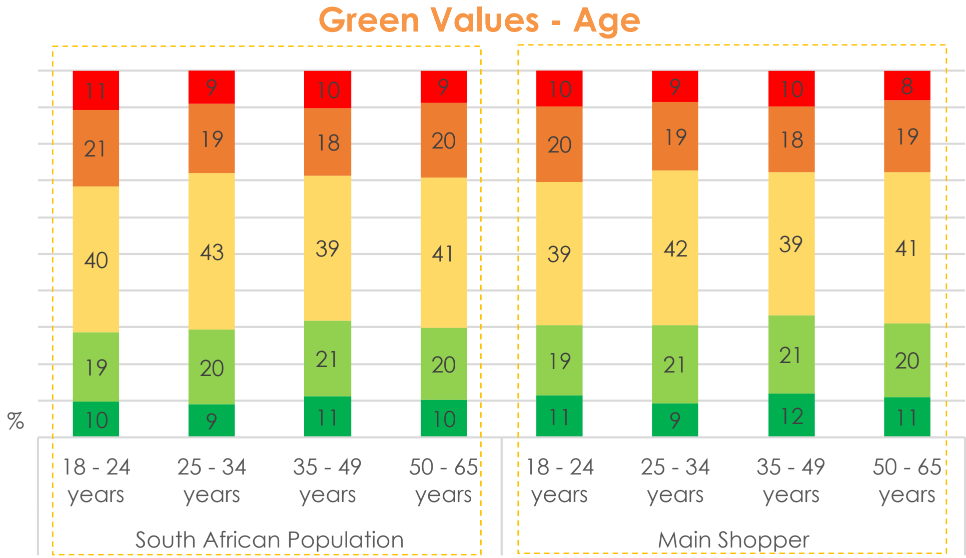
Source: TGI 2015B/2016A

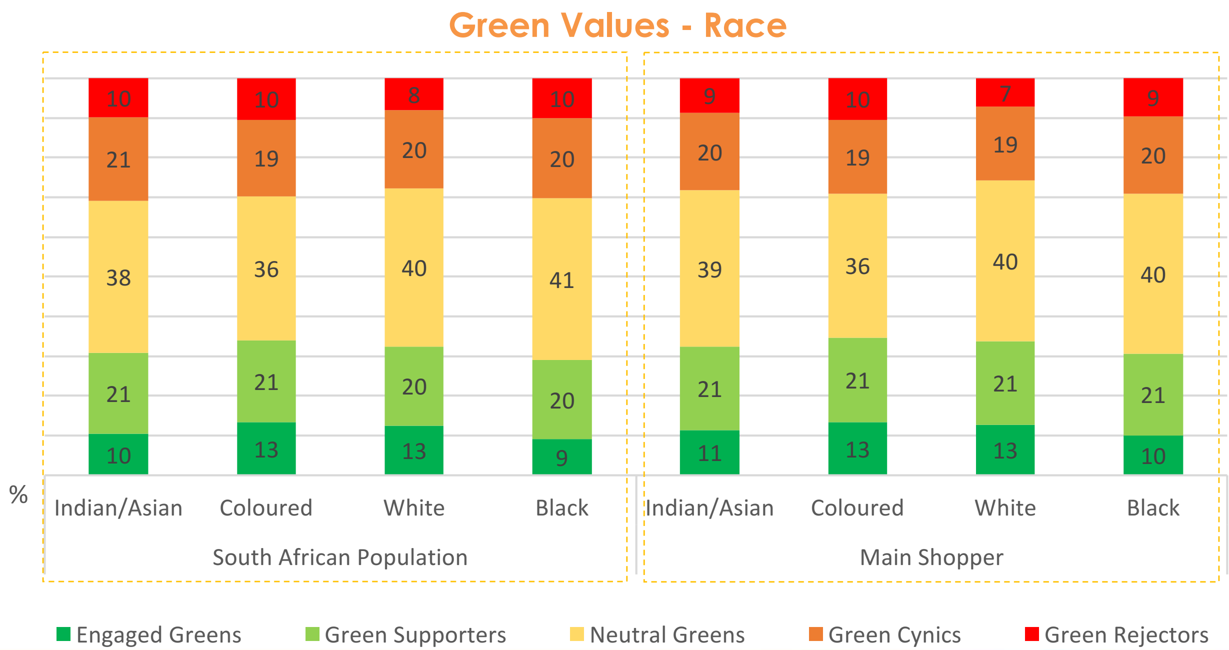
Main Shopper = Personally selects 50% or more of what is bought

Profiling environmentally friendly consumers Based on TGI data

BTC TRADE FOR DEVELOPMENT







Being an Engaged Green consumer or Green Supporter is not specifically dependent on gender or age. It is, however, apparent that **Coloured and White consumers** tend towards being more Engaged Greens.

Source:TGI 2015B/2016A

Main Shopper = Personally selects 50% or more of what is bought

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Profiling environmentally friendly consumers Based on TGI data

BTC TRADE FOR DEVELOPMENT

Green Values – Significant Testing for overall South African Population

	Engaged Greens		Green Cynics		Green Rejecters	
	SA Population	Main Shoppers	SA Population	Main Shoppers	SA Population	Main Shoppers
More likely to comprise of these demographics:	LSM 10 - 52% Coloured – 32% White – 25% Mangaung – 78% Cape Town – 62% Tshwane – 61%	LSM 10 - 34% Coloured – 23% White – 18% Mangaung – 41% Cape Town – 47% Tshwane – 67%	LSM 5 - 28% Female – 4% Mandela Bay – 16% Ekurhuleni – 12% Johannesburg – 13%	LSM 5 - 40% Female 6% Mandela Bay – 21% Ekurhuleni – 14% Johannesburg – 14%	LSM 7 - 23%	LSM 7 - 24% Female 6%
Less Likely to comprise of these demographics:	LSM 5 – 45% Black – 10% 25-34 years – 11% Ethekwini – 47% Mandela Bay – 41% Johannesburg – 11%	LSM 5 – 56% Black – 7% 25-34 years – 14% Ethekwini – 49% Mandela Bay – 38%	LSM 9 – 10% LSM 8 – 12% 35-49 years – 8% Mangaung – 60% Cape Town – 28% Tshwane – 15%	LSM 8 – 15% 35-49 years – 7% Ethekwini – 19% Mangaung – 56% Cape Town – 28% Tshwane – 18%	LSM 10 – 38% LSM 9 – 36% 25-34 years – 10% 50-65 years – 12% White – 8% Mangaung – 57% Tshwane – 37%	LSM 10 – 40% LSM 9 – 37% 50-65 years – 12% White – 22% Mangaung – 49% Cape Town – 20% Tshwane – 40%

	Green Supporters		Neutral Greens	
	SA Population	Main Shoppers	SA Population	Main Shoppers
More likely to comprise of these demographics:	LSM 10 - 15% Mangaung – 78% Cape Town – 11%	LSM 10 - 19% Mangaung – 65% Cape Town – 16%	LSM 9 - 9% 25-34 years – 7%	LSM 9 - 13% 25-34 years – 5%
Less Likely to comprise of these demographics:	Ekurhuleni – 11%	LSM 5 – 16%	Cape Town – 6%	Coloured – 9%

Source: TGI 2015B/2016A

Main Shopper = Personally selects 50% or more of what is bought

Profiling environmentally friendly consumers Based on TGI data

BTC TRADE FOR DEVELOPMENT

	I would never buy toiletries and cosmetics that have been tested on animals	I regularly buy Organic Meat	I regularly buy Organic Dairy Products	I regularly buy Organic Fruit & Vegetables	I regularly buy Free Range
SA Population	46% ●	20%	22%	26%	21%
LSM 5	39%	16%	16%	19%	18%
LSM 6	44%	19%	22%	25%	22%
LSM 7	45%	20%	20%	26%	21%
LSM 8	49%	19%	20%	25%	18%
LSM 9	49%	24%	24%	29%	20%
LSM 10	51% ●	29% ●	31% ●	36% ●	26% ●
18 - 24 years	47% ●	18%	21%	25%	19%
25 - 34 years	45%	22%	21%	25%	22%
35 - 49 years	46%	22%	22%	27%	23%
50 - 65 years	46%	20%	22%	28%	22%
Male	46% ●	20%	21%	26%	20%
Female	46%	20%	22%	27%	22%
Black	45%	20%	21%	27%	22%
White	49%	25% ●	26%	30% ●	23%
Coloured	50% ●	16%	23%	18%	17%
Indian/Asian	47%	19%	24%	31%	22%
City of Cape Town	53% ●	23%	27%	23%	21%
Nelson Mandela Bay	42%	12%	13%	19%	16%
Mangaung	59% ●	25%	38% ●	35% ●	49% ●
Ethekwini	48%	20%	26%	32%	21%
Ekurhuleni	40%	28%	22%	34%	19%
City of Johannesburg	40%	22%	20%	27%	18%
City of Tshwane	53% ●	30% ●	27%	34%	33%

% definitely agree and agree

● Highest percentages in specific demographic group

Profiling environmentally friendly consumers Based on TGI data

BTC TRADE FOR DEVELOPMENT

	I would prefer to buy South African but the quality of South African goods is usually not good enough	South African goods are usually of high quality	I buy goods produced by my own country (South Africa) whenever I can	I like to support companies that display the Proudly South Africa Branding
SA Population	44%	48%	48%	54% ●
LSM 5	34%	46%	39%	49%
LSM 6	44%	46%	47%	54%
LSM 7	41%	46%	46%	54%
LSM 8	47%	48%	50%	56% ●
LSM 9	47%	52%	50%	53%
LSM 10	52% ●	56% ●	55% ●	54%
18 - 24 years	42%	46%	47%	53%
25 - 34 years	44%	46%	47%	54%
35 - 49 years	45%	50%	49%	54%
50 - 65 years	47%	50%	50%	56%
Male	45%	48%	48%	53%
Female	43%	48%	47%	54%
Black	43%	47%	47%	54%
White	47%	51%	51%	51%
Coloured	45%	51%	49%	56% ●
Indian/Asian	48%	49%	53% ●	50%
City of Cape Town	49%	53%	50%	55%
Nelson Mandela Bay	34%	45%	39%	48%
Mangaung	49%	71% ●	67% ●	71% ●
Ethekwini	53%	45%	53%	50%
Ekurhuleni	30%	45%	43%	53%
City of Johannesburg	44%	47%	47%	56%
City of Tshwane	47%	52%	53%	57%

% definitely agree and agree

● Highest percentages in specific demographic group

BTC TRADE FOR DEVELOPMENT

ASK AFRIKA
DARE TO KNOW

Research Methodology

Research Methodology

Research Design

A quantitative research design was used to address the objectives of this study.

In order to determine South African consumers' awareness, opinions and understanding of ethical labels, 40 Minute CAPI interviews were conducted with the general South African population from 13 February - 28 February 2017.

The following was measured:

- Awareness of ethical labels
- Understanding of ethical labels
- Shopping habits of South African consumers

Sample

- 1773 completed interviews
- General South Africans
- Age: 18 years+
- Social economic class LSM 5 – 10
- Natural fallout of ethical label awareness

95% Confidence level

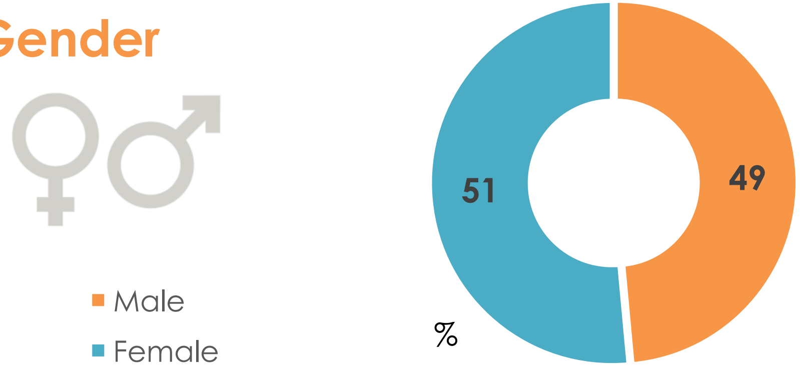
2% Maximum margin of error on an overall level

- Equal sample split across 7 metropolitans
  - City of Cape Town
  - City of Johannesburg
  - City of Tshwane
  - Mangaung
  - Ethekwini
  - Ekurhuleni
  - Nelson Mandela Bay

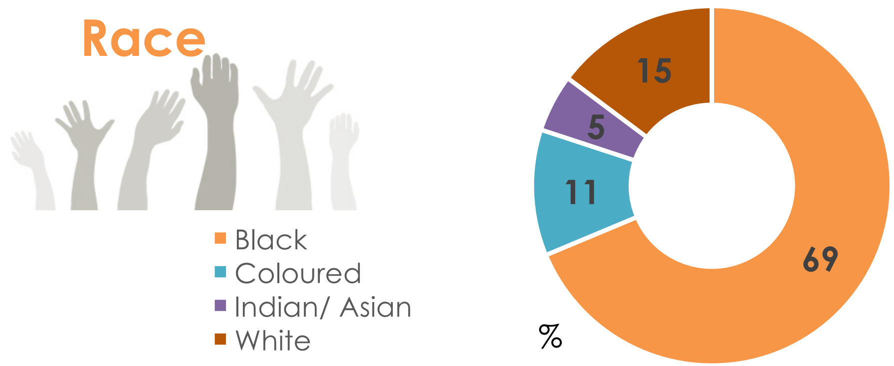
Sample

Who did we speak to?

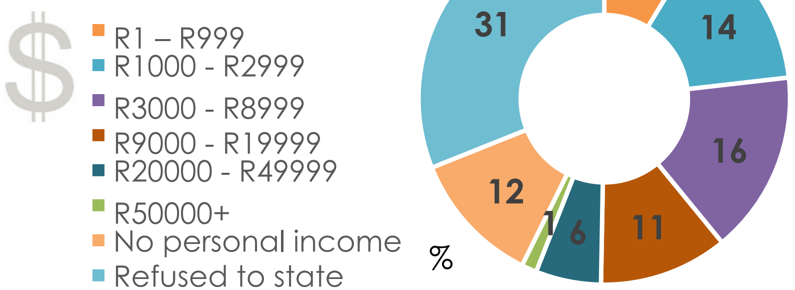
Gender



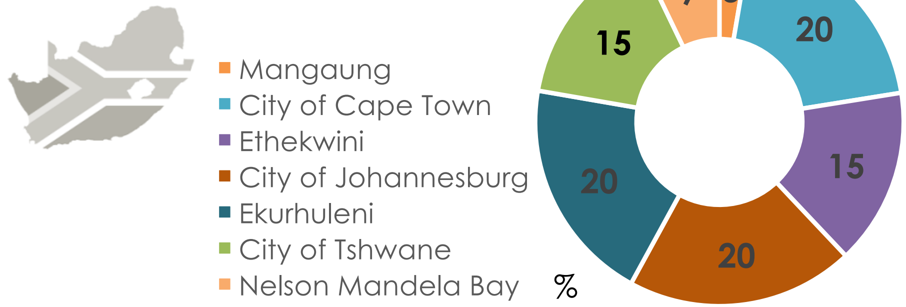
Race



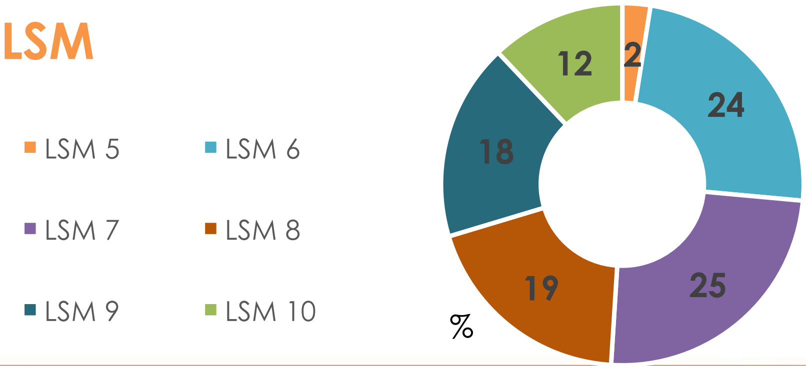
Income group
(monthly personal income)



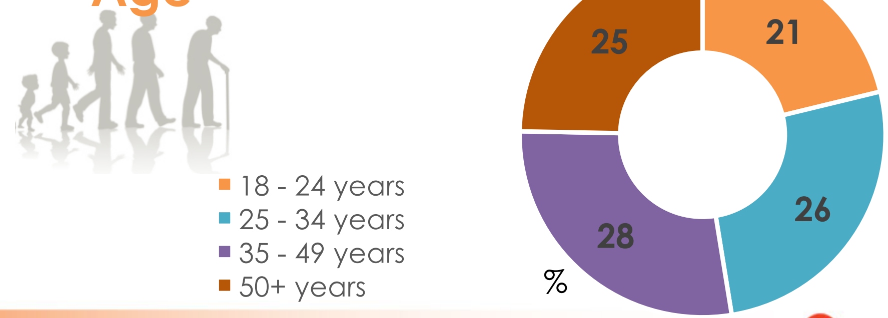
Region



LSM



Age



** Refusal to answer monthly income question is high in SA studies, exp. approx.. 40% in the TGI study*

Empirical Results
Awareness and Associations: Terms

Summary - Terms

SUSTAINABILITY (Overall awareness of term: 31%)

Awareness of the term "sustainability" is **on par with awareness levels of 2013**. Awareness remains highest among the **White population** and is equal for both genders. They mostly get their information about sustainability and sustainably certified products from the **TV**.

ENVIRONMENTALLY FRIENDLY (Overall awareness of term: 50%)

An **equal proportion of people are aware of the term environmentally friendly as those who are not aware**. Awareness of the term "environmentally friendly" is highest among the **White population and Females** as well as **higher incomed** individuals.

EMPOWERMENT (Overall awareness of term: 43%)

Awareness of the term "empowerment" is highest among the **White population** as well as people with a **higher monthly income**.

Summary - Terms

HONEST BUSINESS PRACTICES (Overall awareness of term: 39%)

"Honest business practices" is more familiar for the **Indian and White population**, as well as people with a **higher monthly income**.

ORGANIC PRODUCTS (Overall awareness of term: 50%)

Overall awareness of organic products has declined since 2013. It remains slightly higher among **Females, and the White population**. Organic products are associated with being **Healthy, Natural and Fresh.**

FAIRTRADE (Overall awareness of term: 15%)

There is an increase (from 7% in 2013) in the proportion of people who report to have heard of Fairtrade, with 10% thinking a product is a **fair/reasonably priced product** when it is Fairtrade compliant.

BTC TRADE FOR DEVELOPMENT

Summary - Terms

FAIRTRADE TOURISM (Overall awareness of term: 4%)

Overall awareness of Fairtrade Tourism has **declined since 2013**. Awareness is highest among the **White population**. The understanding of Fairtrade Tourism is that it **benefits local communities**/ the communities in the **areas where you go on holiday benefit**.

MARINE STEWARDSHIP COUNCIL (Overall awareness of term: 3%)

Fewer than three in ten people report to have heard of the Marine Stewardship Council, with 18% thinking it means the **product is from the sea/ ocean.**

FOREST STEWARDSHIP COUNCIL (Overall awareness of term: 2%)

Fewer than two in ten people report to have heard of the Forest Stewardship Council, with 26% thinking Forest Stewardship Council is a **company producing products from trees.**

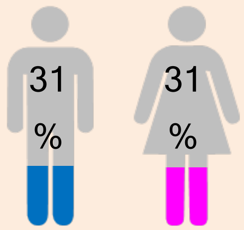
Awareness
Terms

Base: n=1773

Q1. Using a scale from 1 to 5, where 1 indicates not familiar at all and 5 indicates very familiar, please indicate how familiar you are with the following concepts (Sustainability)?

Sustainability (2017)
Aware: 31% Unaware: 69%

Demos for aware



Race: White (41%)
Coloured (34%)

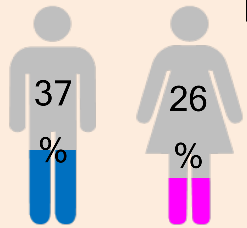
Age: 25 – 34 years (33%)
35 – 49 years (32%)

Income:
R9000 - R19999 (37%)
R20000 – R49999 (37%)

Province:
Gauteng (36%) Free State (33%)
Western Cape (33%)

Sustainability (2013)
Aware: 32% Unaware: 68%

Demos for aware



Race: White (50%)
Indian/Asian (42%)

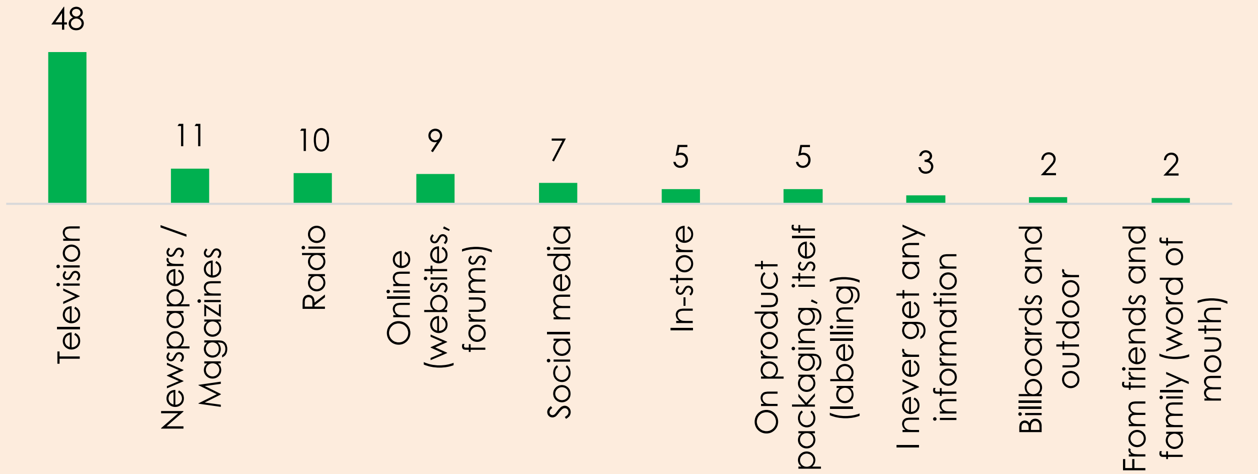
Age: 35 – 49 years (36%)
18 – 24 years (36%)

Income: R50000+ (61%)
R20000 – R49999 (48%)
R9000 - R19999 (40%)

Province:
Free State (42%) Kwazulu-Natal (38%)
Western Cape (37%)

Q2. How would you describe sustainability within a South African context? (open-ended question)	% Mention
Sustainability is poor in South Africa	**10.0**
It is for the well-being of the environment	8.3
Sustainability is good in South Africa	7.9
Sustainability is improving in South Africa	4.3
Living conditions	4.2
Sustainability is maintained in South Africa	3.5
Local businesses	2.6
Responsible use of resources	2.0
Stable economy/ Economic health	1.9
Job creation	1.9

Q14. Where do you tend to get most of your information about sustainability and sustainably certified products?



Awareness

Terms

Base: n=1773

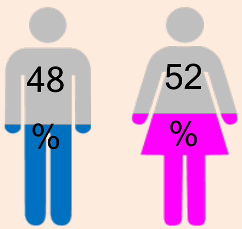
Q1. Using a scale from 1 to 5, where 1 indicates not familiar at all and 5 indicates very familiar, please indicate how familiar you are with the following concepts (Empowerment; Honest business practices; Environmentally friendly)?

Only data for 2017

Environmentally friendly

Aware: 50% Unaware: 50%

Demos for aware



Race:
White (61%)
Coloured (53%)
Indian/ Asian (53%)

Income:
R9000 - R19999 (63%)
R20000 – R49999 (59%)

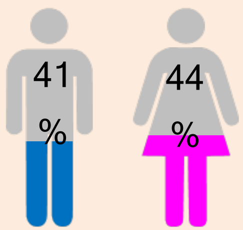
Age:
35 – 49 years (52%)
18 – 24 years (51%)
50+ years (50%)

Province: Gauteng (56%)
Free State (52%) Western Cape (49%)

Empowerment

Aware: 43% Unaware: 57%

Demos for aware



Race: White (52%)
Coloured (45%)

Income:
R9000 - R19999 (59%)
R20000 – R49999 (51%)

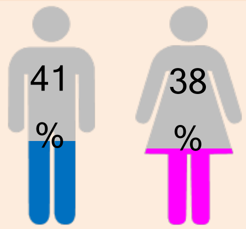
Age:
35 – 49 years (45%)
50+ years (44%)
25 – 34 years (43%)

Province:
Western Cape (48%)
Gauteng (43%) Free State (41%)

Honest business practices

Aware: 39% Unaware: 61%

Demos for aware



Race:
Indian/ Asian (66%)
White (50%)

Age:
25 – 34 years (41%)
50+ years (40%)
35 – 49 years (39%)

Income:
R20000 – R49999 (55%)
R9000 - R19999 (50%)
R50000+ (50%)

Province: Gauteng (42%)
Western Cape (41%)

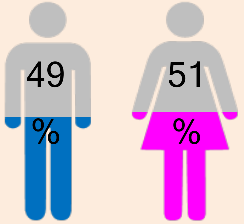
Awareness
Terms

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Organic products (2017)
Aware: 50% Unaware: 50%

Demos for aware



Race: White (71%)
Coloured (71%)

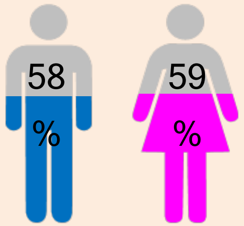
Age: 50+ years (51%)
35 – 49 years (51%)
25 – 34 years (50%)

Income:
R50000+ (88%)
R20000 – R49999 (76%)

Province:
Western Cape (56%) Free State (55%)

Organic products (2013)
Aware: 58% Unaware: 42%

Demos for aware



Race: White (85%)
Indian/Asian (83%)

Age: 50+ years (67%)
35 – 49 years (63%)

Income: R50000+ (96%)
R20000 – R49999 (70%)
R9000 - R19999 (68%)

Province: Western Cape (73%)
Kwazulu-Natal (71%) Free State (70%)

Q15. Have you ever heard of organic products?

Q15a What does organic products mean? (open-ended question)	% Mention
Healthy products	**22.4**
Natural products	**17.2**
Fresh products	**10.4**
Chemical free	9.9
No fertilizers used while farming	2.8
Pure products - No mixing of ingredients	2.7
Preservative free products	1.9
Animals and produce raised/ grown using natural energy and resources	1.9
Pesticide free products	1.8
Products directly from the soil	1.7
Original products	1.5
Animal products that do not contain any growth hormones	1.1
Environmentally friendly products	1.1
Green products	1.1
Safe products	1.0
Locally grown products	1.0

Awareness
Terms

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q16. Have you ever heard of Fairtrade?

Fairtrade (2017)
Aware: 15% Unaware: 85%

Demos for aware

17 % 13 %

Race:
White (18%)
Coloured (16%)

Income:
R50000+ (25%)
R1 – R999 (23%)

Age:
35 – 49 years (16%)
50+ years (15%)
18 – 24 years (15%)

Province:
Free State (20%)
Gauteng (19%)

Fairtrade (2013)
Aware: 7% Unaware: 93%

Demos for aware

7 % 7 %

Race:
Coloured (19%)
White (10%)

Province:
Western Cape (17%)
Eastern Cape (9%)

Income:
R50000+ (12%)
R3000 – R8999 (8%)
R9000 - R19999 (8%)

Age:
50+ years (8%)
18 – 24 years (8%)

Q16a. What does it mean when a product is Fairtrade compliant? (open-ended question)	% Mention
Fair/ Reasonably priced product	**10.2**
Products that are traded fairly	**9.1**
Cheap products	7.1
Beneficial trade between seller and buyer	6.7
Good quality products	5.9
Complies to standards	4.5
Products produced by small scale farmers	3.3
Value for money	3.2
More sustainable	2.9
Easily obtainable products	2.8
Fair products	2.8
Products are certified	2.6
Products produced in good working conditions	2.6
Products that were checked before selling	2.4
Benefits consumers	2.4
Healthy products	2.1
Environmentally friendly processes/ production/ manufacturing	2.0
Products allowed to be sold	1.8

Awareness

Terms

Base: n=1773

Q32. Have you ever heard of Fairtrade Tourism?

Fairtrade tourism (2017)

Aware: 4% Unaware: 96%

Demos for aware

5% 3%

Race: White (9%)

Income:
R50000+ (9%)
R20000 - R49999 (8%)

Age: 25 – 34 years (5%)
50+ years (5%)

Province:
Free State (7%)
Western Cape (5%) Gauteng (5%)

Fairtrade tourism (2013)

Aware: 12% Unaware: 88%

Demos for aware

13 % 10 %

Race: Coloured (18%)

Income: R50000+ (27%)
R20000 – R49999 (15%)
R9000 - R19999 (13%)

Age: 35 – 49 years (13%)
18 – 24 years (12%)
50+ years (12%)

Province: Western Cape (14%)
Free State (11%) Kwazulu-Natal (11%)

Q33a. What does Fairtrade Tourism mean? (open-ended question)	% Mention
Tourism benefits local communities/ The communities in the areas where you go on holiday benefit	**16.6**
Importing and exporting products	8.7
Support small communities to grow their tourism	7.7
Promote sustainable trade	6.3
Tours	5.6
Creating jobs through tourism	5.5
Employees are paid fairly	5.3
Nothing	4.0
International travel	2.8
Fair to tourists	2.7
Tourism must comply to ethics	1.9
Getting value for money for services	1.9
Transport	1.4
Tourism organisations	0.3

Awareness

Terms

Only data for 2017

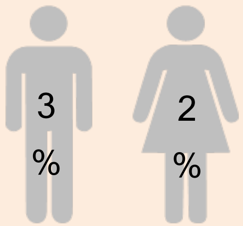
Base: n=1773

Q17. Have you ever heard of the Marine Stewardship Council?

MSC (2017)

Aware: 3% Unaware: 97%

Demo's for aware



Race: Coloured (6%)
White (5%)

Income:
R20000 - R49999 (13%)

Age: 50+ years (3%)
18 – 24 years (3%)

Province:
Western Cape (4%)
Kwazulu-Natal (4%)

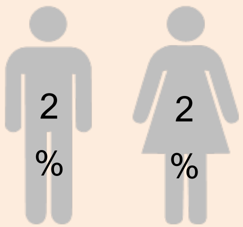
Q17a. What does it mean when a product is labelled as Marine Stewardship Council (MSC)? (open-ended question)	% Mention
The product is from the sea/ ocean	**18.1**
Imported products	9.6
The product was shipped	9.0
Fisheries are self sustained	8.9
Fisheries comply to the laws of the MSC	8.3
The product has been certified by the marine stewardship council	8.1
The sea food was inspected	4.7
Nothing	3.0
Sea food council	2.3
International fisheries who does not comply to sustainable fishing	2.3

Q18. Have you ever heard of the Forest Stewardship Council?

FSC (2017)

Aware: 2% Unaware: 98%

Demo's for aware



Race: White (6%)

Age: 50+ years (2%)
35 – 49 years (2%)
25 – 34 years (2%)

Income:
R50000+ (9%)
R20000 - R49999 (5%)

Province:
Western Cape (3%)
Kwazulu-Natal (2%)

Q18a. What does it mean when a product is labelled Forest Stewardship Council (FSC)? (open-ended question)	% Mention
Company producing products from trees	**25.7**
Product supports the protection of forests	**16.4**
Product produced from well managed forests	10.3
Product supports the protection of the environment	10.3
It's about fishing	8.7
Nothing	8.6
Product is locally manufactured	3.4
Product supports human rights	3.4
Product is tested and processed by the forest council	3.4

BTC TRADE FOR DEVELOPMENT

ASK AFRIKA™
DARE TO KNOW

Empirical Results
Awareness and Associations: Logos

Awareness and Associations Summary - Logos

BTC TRADE FOR DEVELOPMENT

FAIRTRADE (Overall awareness of logo: 7%)

The proportion of people who recognise the Fairtrade logo has **increased slightly since 2013**, however, the levels are **still relatively low.** Higher levels of awareness and purchase are noticed among **Females**, as well as the **Black and White** population. Awareness of the Fairtrade **logo is significantly lower than the recognition of the term.** The Fairtrade logo is more likely to be associated with being **believable**, and **consistent with their values.** 60% of the people who are aware of the Fairtrade logo prefer to purchase products with this label.

FAIRTRADE TOURISM (Overall awareness of logo: 5%)

Awareness levels of the term and logo are on par for Fairtrade Tourism, showing a slight increase in awareness of the logo since 2013. Higher levels of awareness and purchase of products with the Fairtrade Tourism logo are noticed among **Males**, and the **Black and White** population. The Indian population show an increased likelihood to purchase products with the Fairtrade tourism logo. The Fairtrade Tourism logo is more likely to be **trusted**, and to be **believable**. 59% of the people who are aware of the Fairtrade Tourism logo prefer to purchase products with this label.

MSC (Overall awareness of logo: 3%)

A larger proportion of **Males** as well as **White** people recognise and purchase the MSC logo. **Awareness of the term and logo is equal** for Marine Stewardship Council. The MSC logo is more likely to be to be **trusted,** and to be **believable**. It is also associated with **doing good work** and **personally identifiable with their values**. 56% of the people who are aware of the MSC logo prefer to purchase products with this label.

FSC (Overall awareness of logo: 6%)

Awareness of the Forest Stewardship Council **logo is significantly higher than the recognition of the term**; awareness levels are higher among the **Black and White population**. The Coloured population show an increased likelihood to be aware of products with the FSC logo. The FSC logo is associated with all the tested statements. 65% of the people who are aware of the FSC logo prefer to purchase products with this label.

Awareness and Associations Summary - Logos

SASSI (Overall awareness of logo: 5%)

Recognition of the SASSI logo has **declined slightly** since 2013. Awareness levels are higher among **Females** as well as the **White** population. The **Indian** population show an increased likelihood to purchase products with the SASSI logo. The SASSI logo is more likely to be to be **trusted,** and to be **believable** as well as to be **consistent with their values.** SASSI is recognised as being **widely available** and **doing good work.** 64% of the people who are aware of the SASSI logo prefer to purchase products with this label.

PROUDLY SA (Overall awareness of logo: 86%)

Levels of logo recognition are significantly higher for the Proudly South African logo, furthermore it has **increased slightly since 2013.** Recognition and purchase of the logo is highest among the **Black** population. The Proudly SA logo is highly associated with all the tested statements. 80% of the people who are aware of the Proudly SA logo prefer to purchase products with this label.

WWF (Overall awareness of logo: 15%)

There is a **noticeable decline in awareness** of the WWF logo since 2013. Awareness levels are higher among the **Black** population. Despite a higher level of awareness when compared to the other logos; the WWF logo is not highly associated with the tested statements. 52% of the people who are aware of the WWF logo prefer to purchase products with this label.

NOT TESTED ON ANIMALS (Overall awareness of logo: 6%)

Awareness of the Not tested on Animals logo has shown **a noticeable increase since 2013**. Awareness levels are higher among **Females** as well as the **Black** and **White** population. This logo is associated with all the statements that were measured. 77% of the people who are aware of the Not Tested on Animals logo prefer to purchase products with this label.

USDA ORGANIC (Overall awareness of logo: 4%)

Purchase of products with the USDA Organic logo is higher among **Females,** as well as the **Indian** population. Despite a lower level of awareness, the USDA Organic logo is highly associated with the statements measured. 81% of the people who are aware of the USDA Organic logo prefer to purchase products with this label.

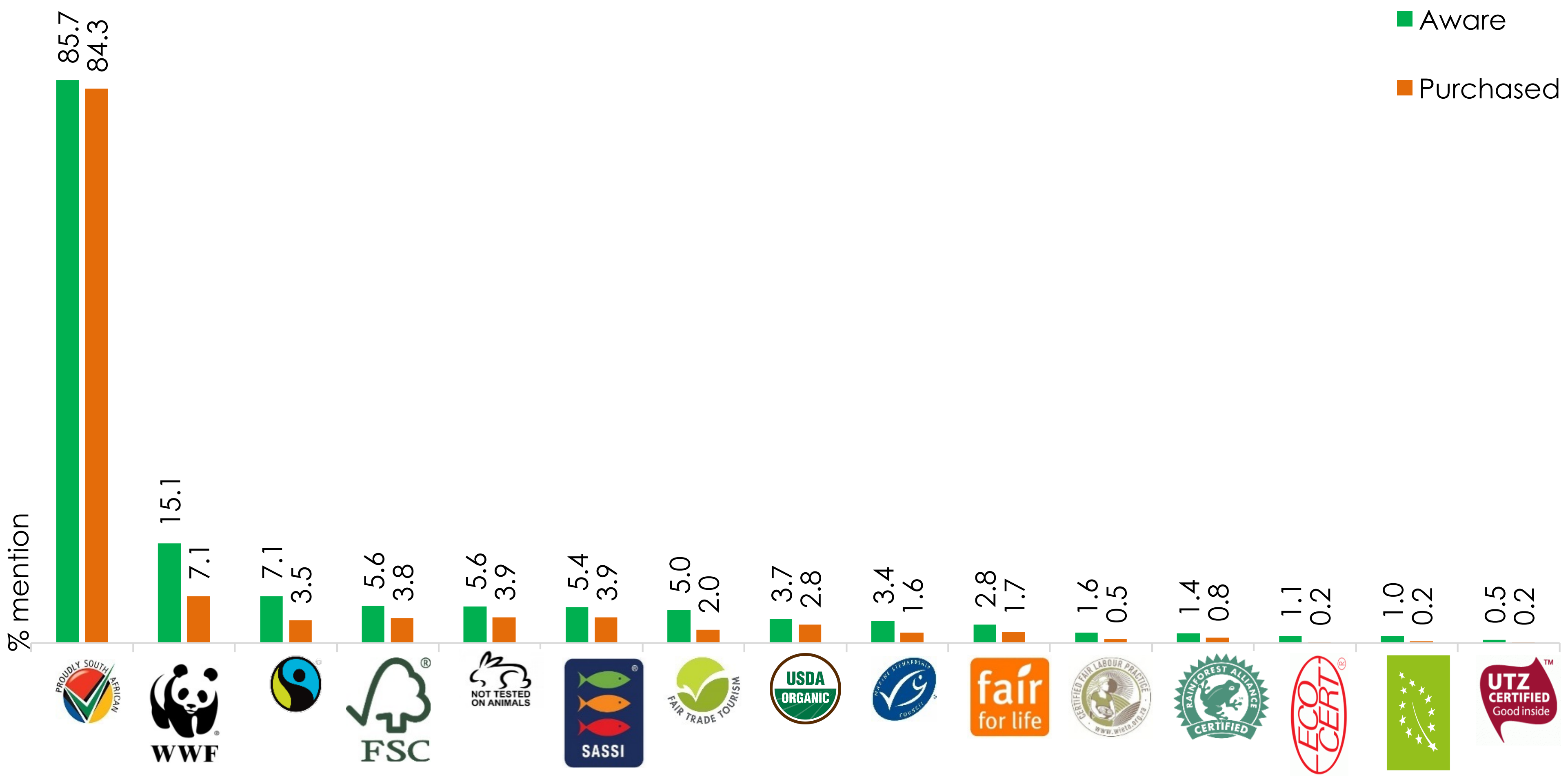
Awareness

Logos

Base: n=1773

Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of? | Q19a. Have you ever purchased any product with this label?

Awareness and purchase of "Proudly South African" is overwhelmingly greater than the other logos. If consumers are not actively aware of the logo on products, they would not be able to recall purchasing them either.



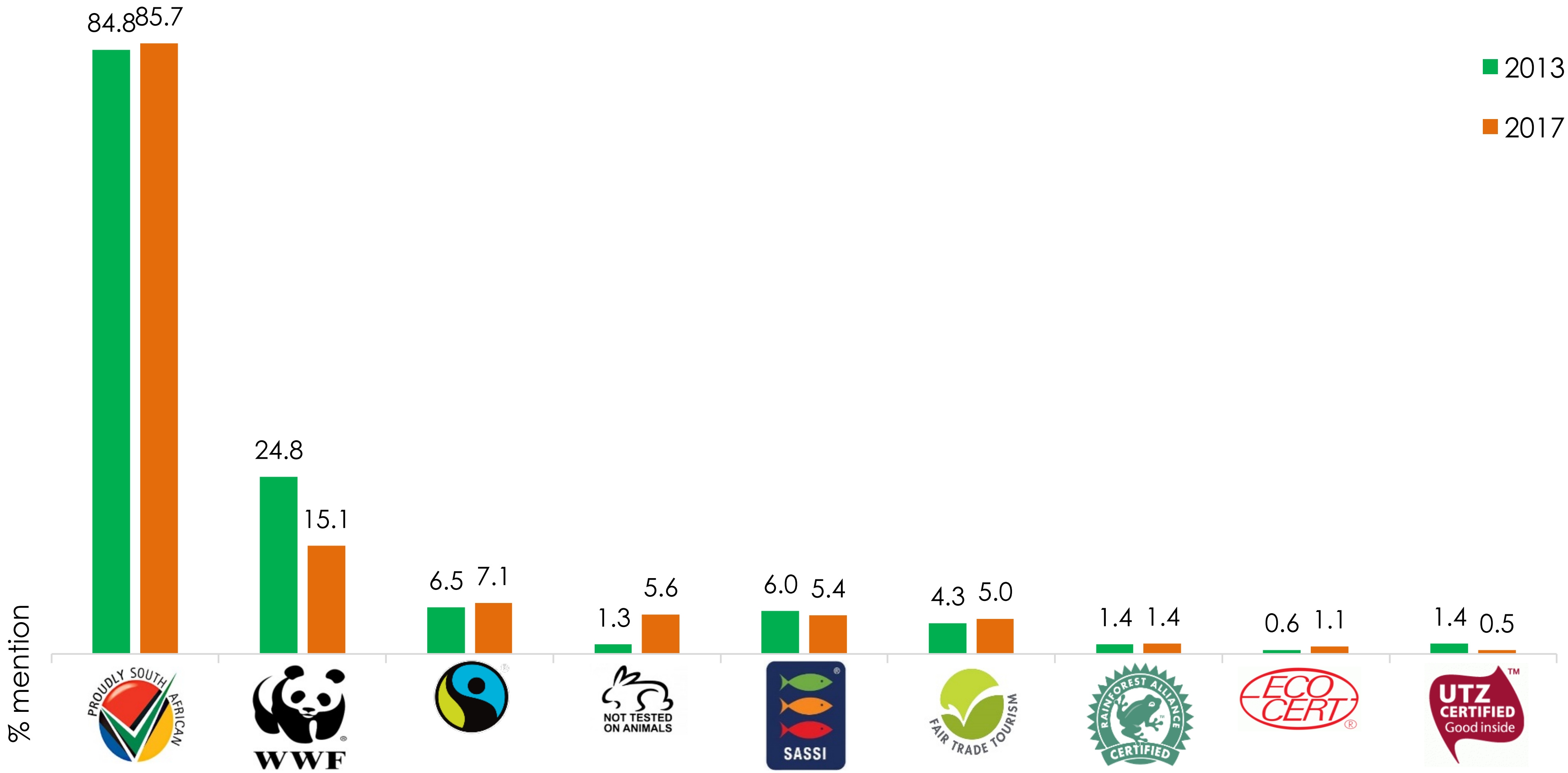
Ranked based on 2017 'Aware'

Awareness
Logos

Base: n=1773

Which of these logos, if any, do you recognise or have you ever seen/ heard of?
2017 and 2013 Comparison

Awareness of Proudly South African, Fairtrade, Not tested on Animals, Fairtrade Tourism and Ecocert logos have all increased since 2013 – the largest increase noticed for Not tested on Animals. There is a noticeable decline in awareness of the WWF since 2013.



Ranked based on 2017 'Aware'

Awareness

Logos

Base: n=1773

Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of? | Have you ever purchased any product with this label?

Fairtrade — Aware: 7% (n=115)

44 % | 56 %

Race: Black (76%)
White (21%)

Income:
R1 – R999 (26%)
R1000 – R1999 (25%)

Age: 35 – 49 years (32%)
25 – 34 years (29%)

Province:
Gauteng (26%) Western Cape (11%)

Fairtrade tourism — Aware: 5% (n=87)

55 % | 45 %

Race: Black (62%)
White (23%)

Income:
R3000 – R8999 (27%)
R9000 – R19999 (20%)

Age: 35 – 49 years (29%)
25 – 49 years (25%)

Province:
Gauteng (21%) Western Cape (19%)

MSC — Aware: 3% (n=55)

64 % | 36 %

Income:
R3000 – R8999 (33%)
R9000 – R19999 (25%)
R20000 – R49999 (24%)

Age: 35 – 49 years (38%)
50+ years (27%)

Race: Black (41%); White (35%); Coloured (18%)

Province: Western Cape (27%)
Kwazulu-Natal (18%)

Fairtrade — Purchased: 4% (n=46)

47 % | 53 %

Race: Black (80%)

Income:
R1000 – R2999 (38%)
R1 – R999 (26%)

Age: 25 – 34 years (34%)
35 – 49 years (32%)

Province: Gauteng (29%)

Fairtrade tourism — Purchased: 2% (n=32)

58 % | 42 %

Race: Black (45%)
White (31%); Indian (14%)

Age:
50+ years (27%)
18 – 24 years (25%)
25 – 34 years (25%)

Income:
R20000 – R49999 (28%)
R1000 – R2999 (21%)

Province:
Kwazulu-Natal (31%) Gauteng (18%)

MSC — Purchased: 2% (*n=26)

75 % | 25 %

Race: White (42%)
Black (37%)

Income:
R20000 – R49999 (40%)
R3000 – R8999 (26%)

Age: 35 – 49 years (39%)
50+ years (29%)

Province:
Kwazulu-Natal (25%) Gauteng (17%)

* Small base size, interpret with caution

Awareness
Logos

Base: n=1773

Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of? | Q19a. Have you ever purchased any product with this label?

FSC
Aware: 6% (n=102)

Race: Black (64%); Coloured (17%); White (17%)

Male 54 % | Female 46 %

Income:
R3000 – R8999 (24%)
R9000 – R19999 (22%)
R1 – R999 (21%)

Age: 25 – 34 years (29%)
35 – 49 years (29%)
18 – 24 years (27%)

Province: Gauteng (21%) Western Cape (19%)

Fair for life
Aware: 3% (n=45)

Male 50 % | Female 50 %

Race: Black (64%)
White (25%)

Income:
R3000 – R8999 (32%)
R20000 – R49999 (25%)

Age: 35 – 49 years (35%)
25 – 34 years (26%)
18 – 24 years (25%)

Province: Gauteng (21%) Western Cape (19%)

SASSI
Aware: 5% (n=95)

Male 40 % | Female 60 %

Race: White (41%)
Black (37%)
Indian (12%)

Income: R20000 – R49999 (31%)

Age: 50+ years (33%)
35 – 49 years (33%)

Province: Kwazulu-Natal (20%) Western Cape (19%) Gauteng (18%)

FSC
Purchased: 4% (n=57)

Male 52 % | Female 48 %

Race: Black (67%)

Income:
R1 – R999 (27%)
R3000 – R8999 (26%)
R1000 – R2999 (20%)

Age: 35 – 49 years (34%)
25 – 34 years (31%)

Province: Gauteng (23%)

Fair for life
Purchased: 2% (*n=23)

Male 51 % | Female 49 %

Race: Black (52%)
White (27%)

Income:
R20000 – R49999 (35%)
R1000 – R2999 (30%)
R3000 – R8999 (26%)

Age: 35 – 49 years (37%)
18 – 24 years (25%)

Province: Kwazulu-Natal (21%) Gauteng (20%)

SASSI
Purchased: 4% (n=57)

Male 50 % | Female 50 %

Race: White (41%)
Black (36%) Indian (19%)

Income:
R20000 – R49999 (34%)
R9000 – R19999 (20%)

Age: 50+ years (39%)
35 – 49 years (32%)

Province: Kwazulu-Natal (28%) Gauteng (20%)

* Small base size, interpret with caution

Awareness

Logos

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of? | Q19a. Have you ever purchased any product with this label?

Proudly SA
Aware: 86% (n=1535)

Male: 49 % | Female: 51 %

Race: Black (72%)
White (14%)

Income:
R3000 – R8999 (28%)
R1000 – R3999 (26%)

Age: 35 – 49 years (29%)
25 – 34 years (27%)

Province:
Gauteng (19%) Western Cape (19%)

WWF
Aware: 15% (n=275)

Male: 52 % | Female: 48 %

Race: Black (57%)
White (25%)

Income:
R1000 – R3999 (24%)
R3000 – R8999 (23%)
R9000 – R19999 (22%)

Age: 25 – 34 years (30%)
35 – 49 years (31%)

Province:
Gauteng (21%) Western Cape (20%)

Not tested on animals
Aware: 6% (n=110)

NOT TESTED ON ANIMALS

Male: 43 % | Female: 57 %

Race: Black (42%)
White (34%)

Income:
R3000 – R8999 (23%)
R9000 – R19999 (22%)

Age: 50+ years (33%)
35 – 49 years (29%)

Province:
Kwazulu-Natal (19%) Gauteng (19%)

Proudly SA
Purchase: 84% (n=1346)

Male: 52 % | Female: 48 %

Age: 35 – 49 years (28%)
25 – 34 years (27%)

Income:
R3000 – R8999 (27%)
R1000 – R2999 (26%)

Race: Black (72%)

Province:
Gauteng (19%) Western Cape (19%)

WWF
Purchase: 7% (n=119)

Male: 52 % | Female: 48 %

Age: 25 – 34 years (33%)
35 – 49 years (31%)

Income:
R9000 – R19999 (26%)
R3000 – R8999 (20%)
R1000 – R2999 (19%)

Race: Black (50%) White (31%)

Province:
Gauteng (22%) Western Cape (17%)

Not tested on animals
Purchase: 4% (n=72)

NOT TESTED ON ANIMALS

Male: 47 % | Female: 53 %

Age: 35 – 49 years (34%)
25 – 34 years (30%)

Income:
R3000 – R8999 (24%)
R20000 – R49999 (21%)
R1000 – R2999 (19%)

Race: Black (37%) White (36%)
Indian (12%)

Province: Kwazulu-Natal (23%)
Gauteng (17%) Eastern Cape (18%)

Awareness

Logos

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of? | Q19a. Have you ever purchased any product with this label?

Ecocert
Aware: 1% (*n=20)

44% | 56%

Race: Black (66%), White (31%)

Income: R9000 – R19999 (32%), R1000 – R2999 (26%)

Age: 25 – 34 years (32%), 18 – 24 years (29%), 35 – 49 years (28%)

Province: Gauteng (30%), Free State (5%), Eastern Cape (5%)

EU-Green Leaf
Aware: 1% (*n=19)

41% | 59%

Race: Black (70%), White (17%)

Income: R20000 – R49999 (28%), R9000 – R19999 (25%)

Age: 35 – 49 years (48%), 50+ years (24%), 25 – 34 years (23%)

Province: Gauteng (25%), Western Cape (8%)

USDA Organic
Aware: 4% (n=65)

46% | 54%

Race: Black (36%), Indian (29%), White (26%)

Income: R20000 – R49999 (28%), R50000+ (22%)

Age: 50+ years (44%), 35 – 49 years (30%)

Province: Kwazulu-Natal (45%), Gauteng (12%)

Ecocert
Purchased: 0.2% (*n=4)

13% | 87%

Race: White (56%), Black (44%)

Income: R1000 – R2999 (85%), R1 – R999 (15%)

Age: 35 – 49 years (50%), 25 – 34 years (37%)

Province: Gauteng (29%), Free State (14%)

EU-Green Leaf
Purchased: 0.2% (*n=3)

31% | 69%

Race: Black (100%)

Income: R1 – R999 (58%), R1000 – R2999 (42%)

Age: 25 – 34 years (100%)

Province: Kwazulu-Natal (31%), Gauteng (23%)

USDA Organic
Purchased: 3% (n=45)

41% | 59%

Race: Indian (42%), White (30%), Black (25%)

Income: R20000 – R49999 (39%), R50000+ (30%)

Age: 50+ years (45%), 35 – 49 years (28%)

Province: Kwazulu-Natal (66%)

* Small base size, interpret with caution

Awareness

Logos

Base: n=1773

Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of? | Q19a. Have you ever purchased any product with this label?

Rainforest Alliance — Aware: 1% (*n=25)

44 % | 56 %

Race: Black (52%), White (31%)

Income: R20000 – R49999 (36%)

Age: 25 – 34 years (37%), 18 – 24 years (26%)

Province: Gauteng (23%) Western Cape (21%)

UTZ — Aware: 1% (*n=8)

29 % | 71 %

Race: Black (58%), White (27%)

Income: R9000 – R19999 (51%), R1000 – R2999 (35%)

Age: 50+ years (41%), 18 – 24 years (31%)

Province: Gauteng (28%) Western Cape (15%)

WIETA — Aware: 2% (*n=26)

62 % | 38 %

Race: Black (68%), White (25%)

Income: R9000 – R19999 (24%), R3000 – R8999 (21%)

Age: 25 – 34 years (31%), 50+ years (29%), 35 – 49 years (27%)

Province: Gauteng (32%) Eastern Cape (3%)

Rainforest Alliance — Purchased: 1% (*n=11)

46 % | 54 %

Race: Black (42%), Coloured (32%), White (26%)

Income: R9000 – R19999 (45%), R1000 – R2999 (27%)

Age: 25 – 34 years (43%), 18 – 24 years (27%)

Province: Western Cape (32%) Gauteng (22%)

UTZ — Purchased: 0.2% (*n=2)

0 % | 10...

Race: Black (100%)

Income: R1000 – R2999 (100%)

Age: 25 – 34 years (43%), 18 – 24 years (57%)

Province: Gauteng (33%)

WIETA — Purchased: 1% (*n=7)

55 % | 45 %

Race: White (52%), Black (29%), Coloured (19%)

Income: R20000 – R49999 (34%), R3000 – R8999 (26%), R1 – R999 (23%)

Age: 18 – 24 years (40%), 50+ years (31%), 25 – 34 years (29%)

Province: Gauteng (33%)

Awareness

Current users vs Potential users

Base: n=1773

Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of?

Among the current users – Fairtrade, WWF and Fairtrade Tourism are the most recognised logos. Proudly SA is the logo most recognised among the potential users.

Ordered by % most mentioned by segment

Current Users of Fairtrade products

- **Fairtrade**
- **WWF**
- **Fairtrade Tourism**
- Forest Stewardship Council
- SASSI
- Marine Stewardship Council
- Against animal testing
- Fair for Life
- EU-Green Leaf
- Wieta
- Rainforest Alliance
- UTZ

Potential Users of Fairtrade products

- **Proudly South African**
- USDA Organic
- Ecocert

Awareness congruency

Terms vs. Logos

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q16. Have you ever heard of Fairtrade? | Q32. Have you ever heard of Fairtrade tourism? | Q17. Have you ever heard of the Marine Stewardship Council (MSC)? | Q18. Have you ever heard of the Forest Stewardship Council?

Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of?

Awareness of the term and logo is on par for Fairtrade Tourism and Marine Stewardship Council. Awareness of the Fairtrade logo is significantly lower than the recognition of the term, while awareness of the Forest Stewardship Council logo is significantly higher than the recognition of the term.

% Aware of		% Recognise
Term		Logo
15%	Fairtrade	7% Awareness of the Fairtrade logo is significantly lower than the recognition of the term.
4%	Fairtrade Tourism	5%
3%	Marine Stewardship Council	3%
2%	Forest Stewardship Council	6% Awareness of the Forest Stewardship Council logo is significantly higher than the recognition of the term.

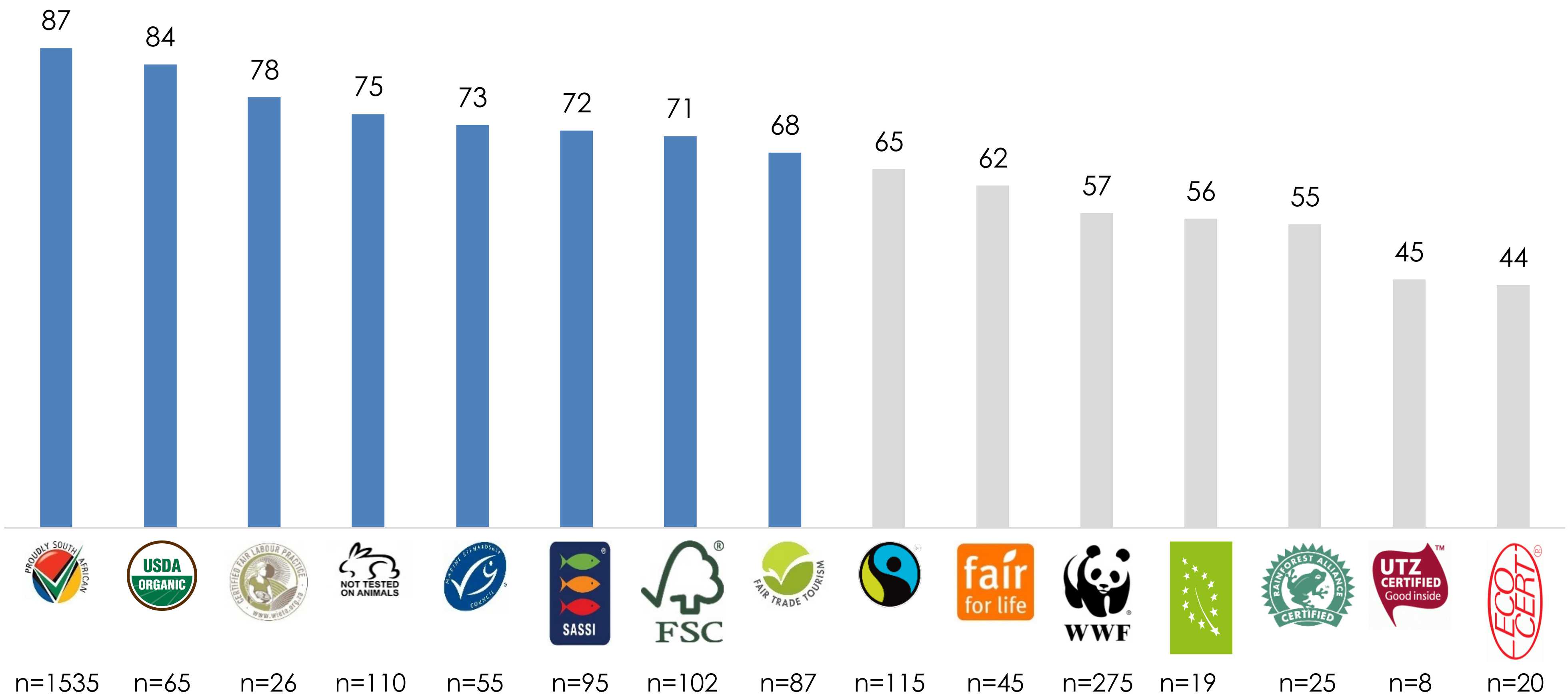
Label associations

Logos

Base: n=1773

Q20. With regard to each of the following labels, using a scale from 1 to 5, where 1 means strongly disagree and 5 means strongly agree, to what extent do you agree these statements apply.

I trust this label/logo



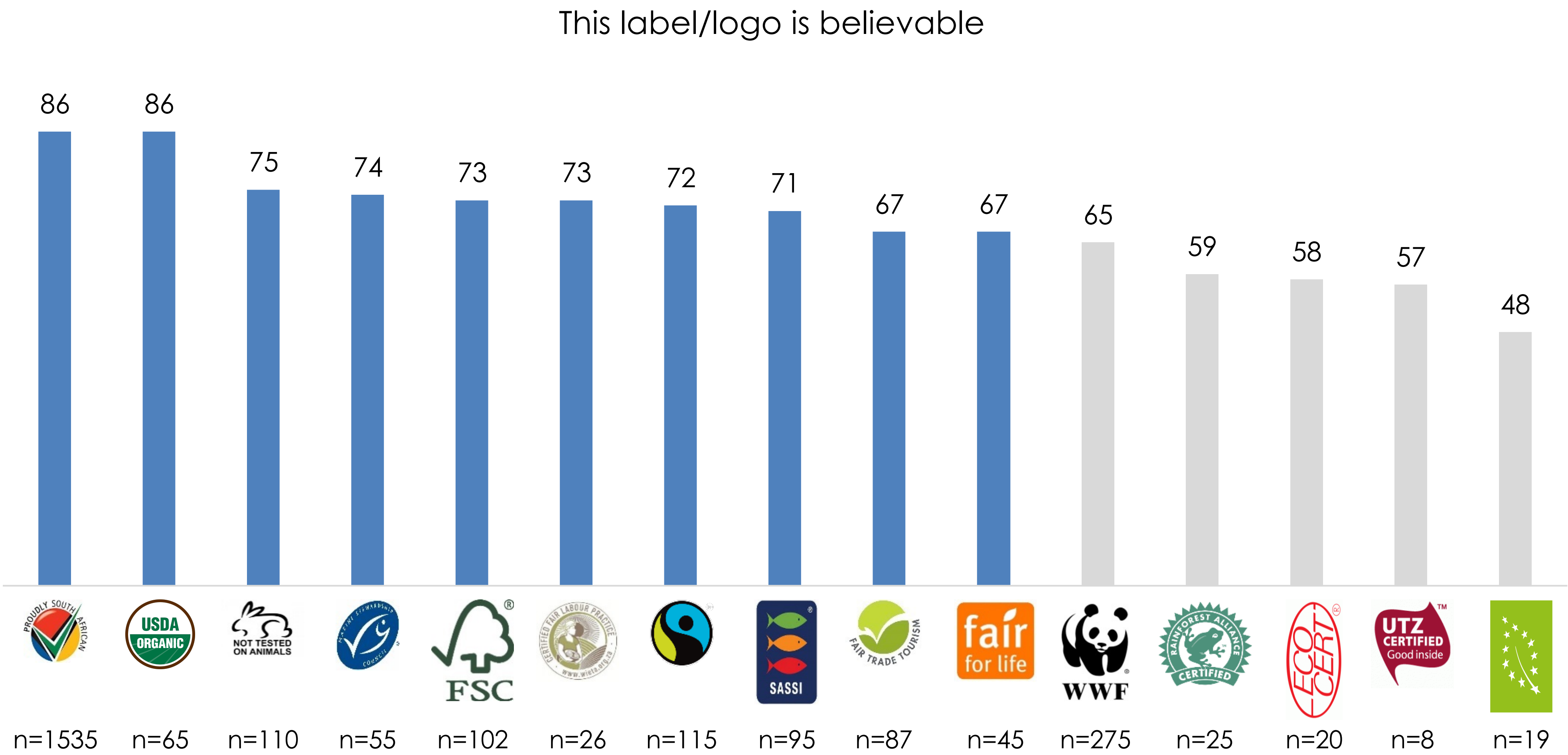
Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

Label associations

Logos

Base: n=1773

Q20. With regard to each of the following labels, using a scale from 1 to 5, where 1 means strongly disagree and 5 means strongly agree, to what extent do you agree these statements apply.

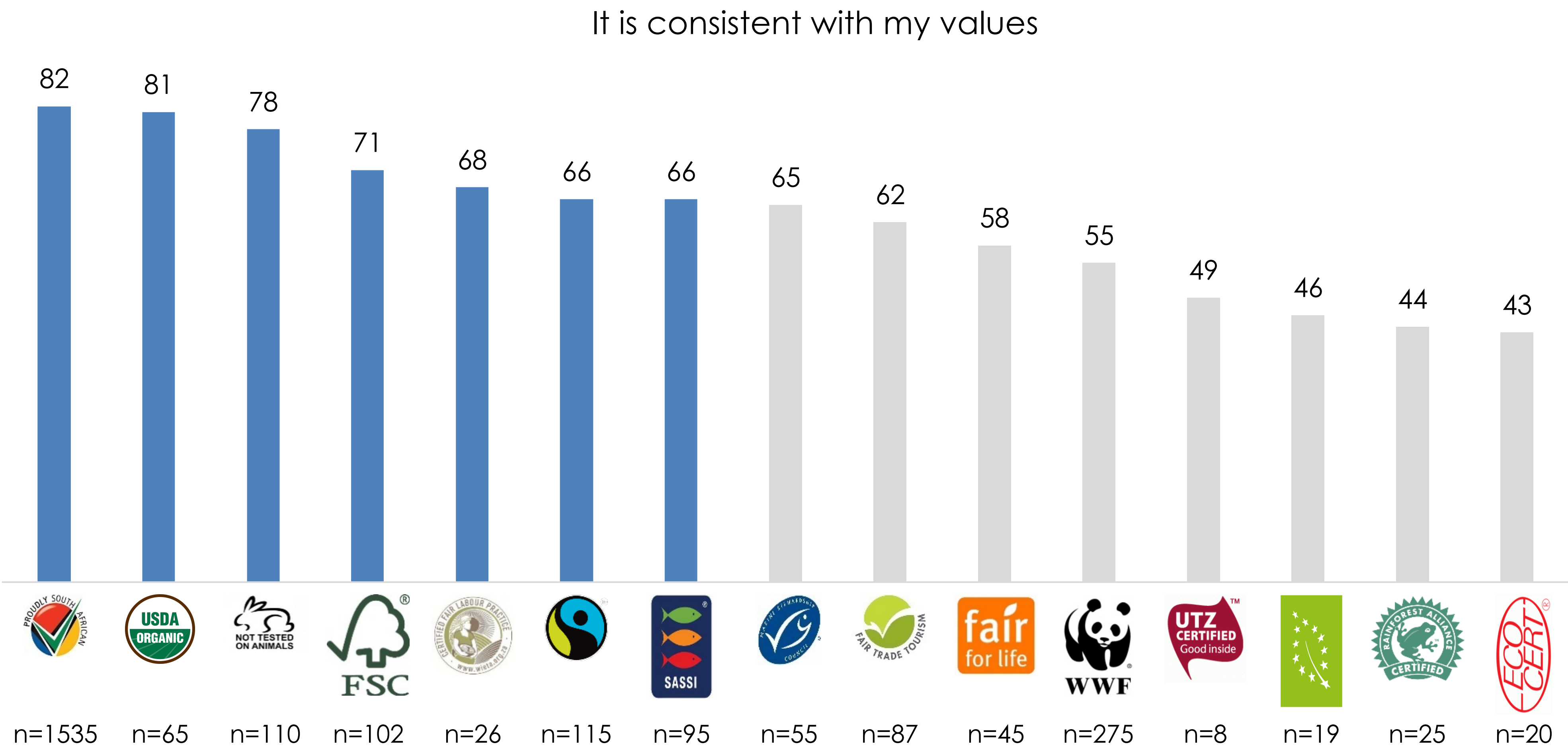


Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

Label associations
Logos

Base: n=1773

Q20. With regard to each of the following labels, using a scale from 1 to 5, where 1 means strongly disagree and 5 means strongly agree, to what extent do you agree these statements apply.

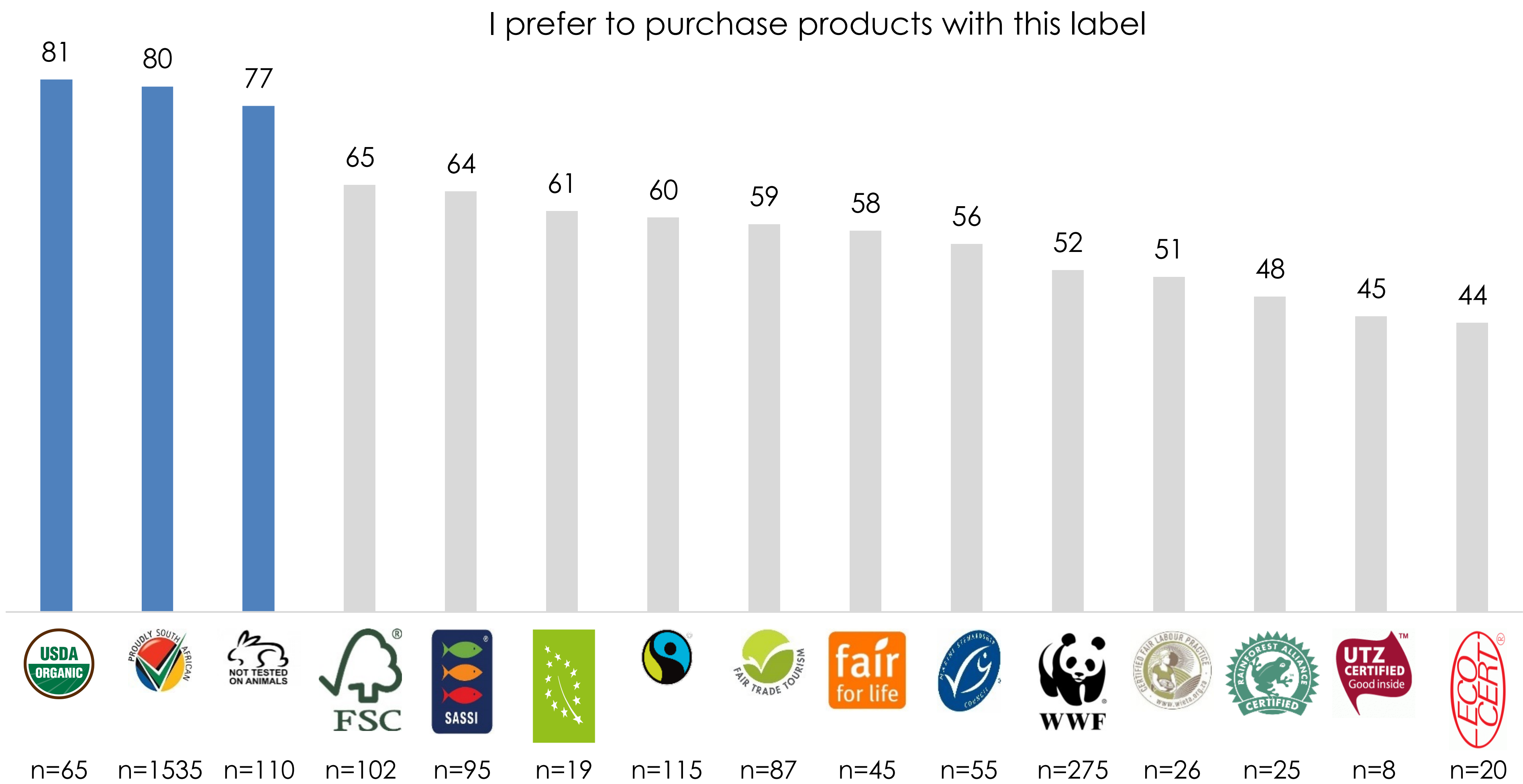


Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

Label associations
Logos

Base: n=1773

Q20. With regard to each of the following labels, using a scale from 1 to 5, where 1 means strongly disagree and 5 means strongly agree, to what extent do you agree these statements apply.



Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

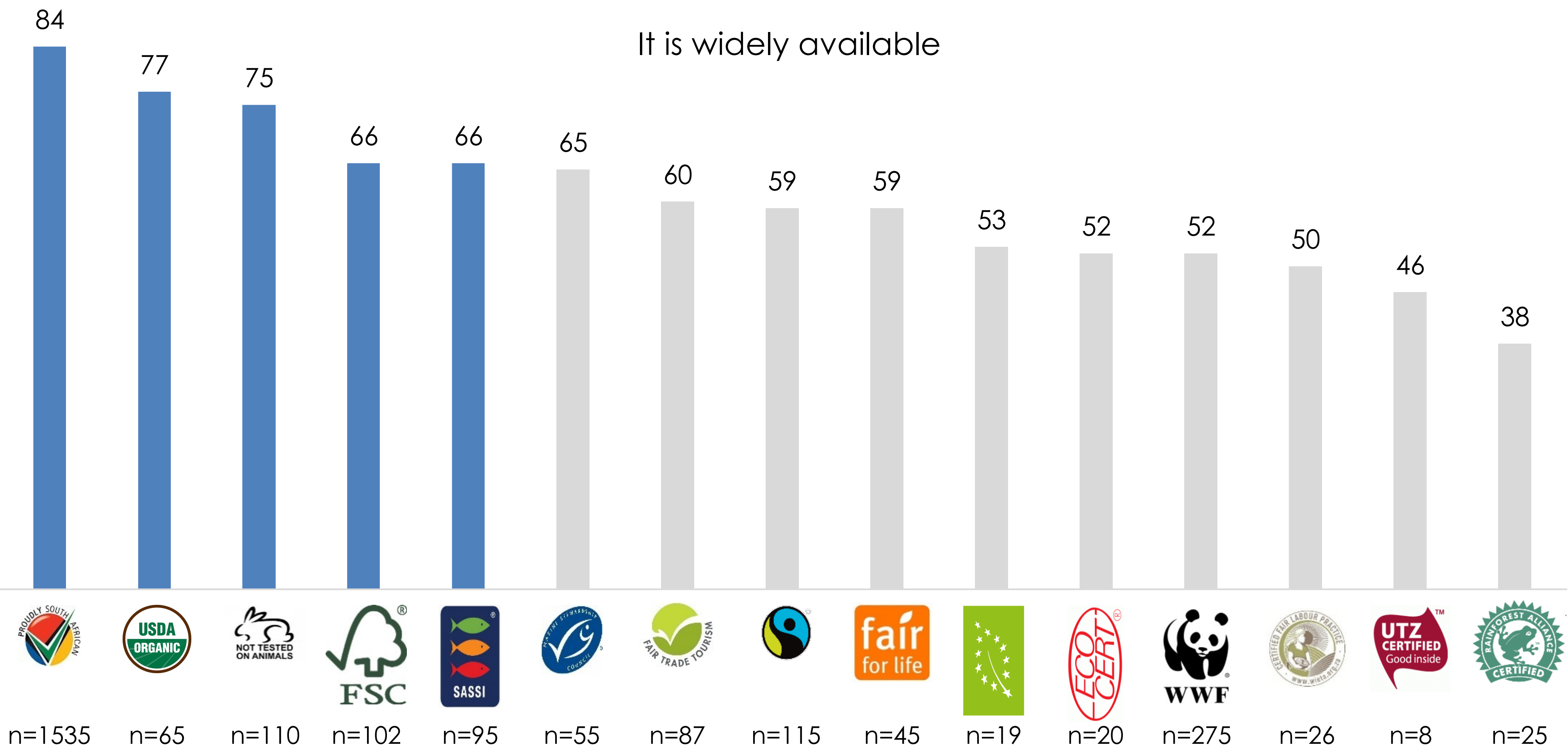
Label associations

Logos

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q20. With regard to each of the following labels, using a scale from 1 to 5, where 1 means strongly disagree and 5 means strongly agree, to what extent do you agree these statements apply.



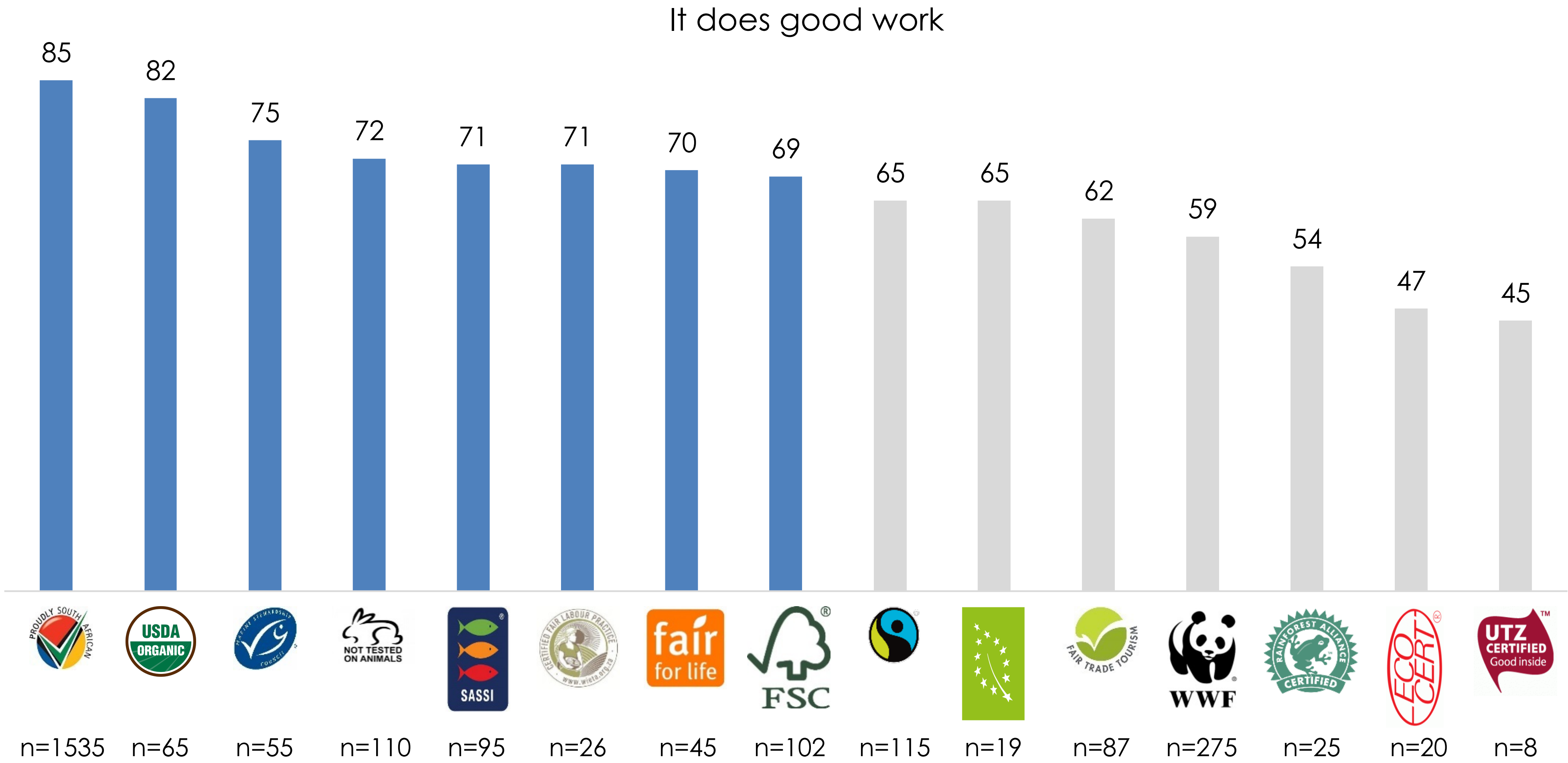
Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

Label associations

Logos

Base: n=1773

Q20. With regard to each of the following labels, using a scale from 1 to 5, where 1 means strongly disagree and 5 means strongly agree, to what extent do you agree these statements apply.

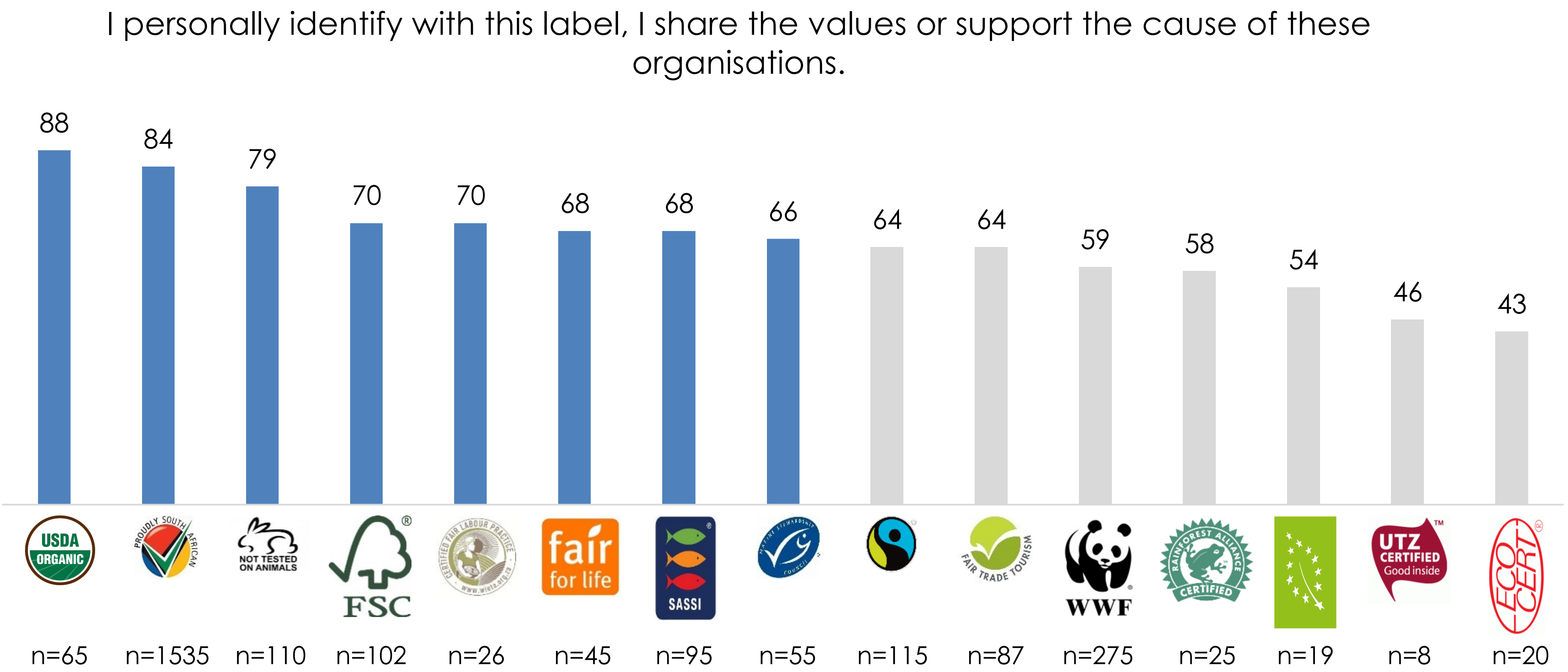


Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

Label associations
Logos

Base: n=1773

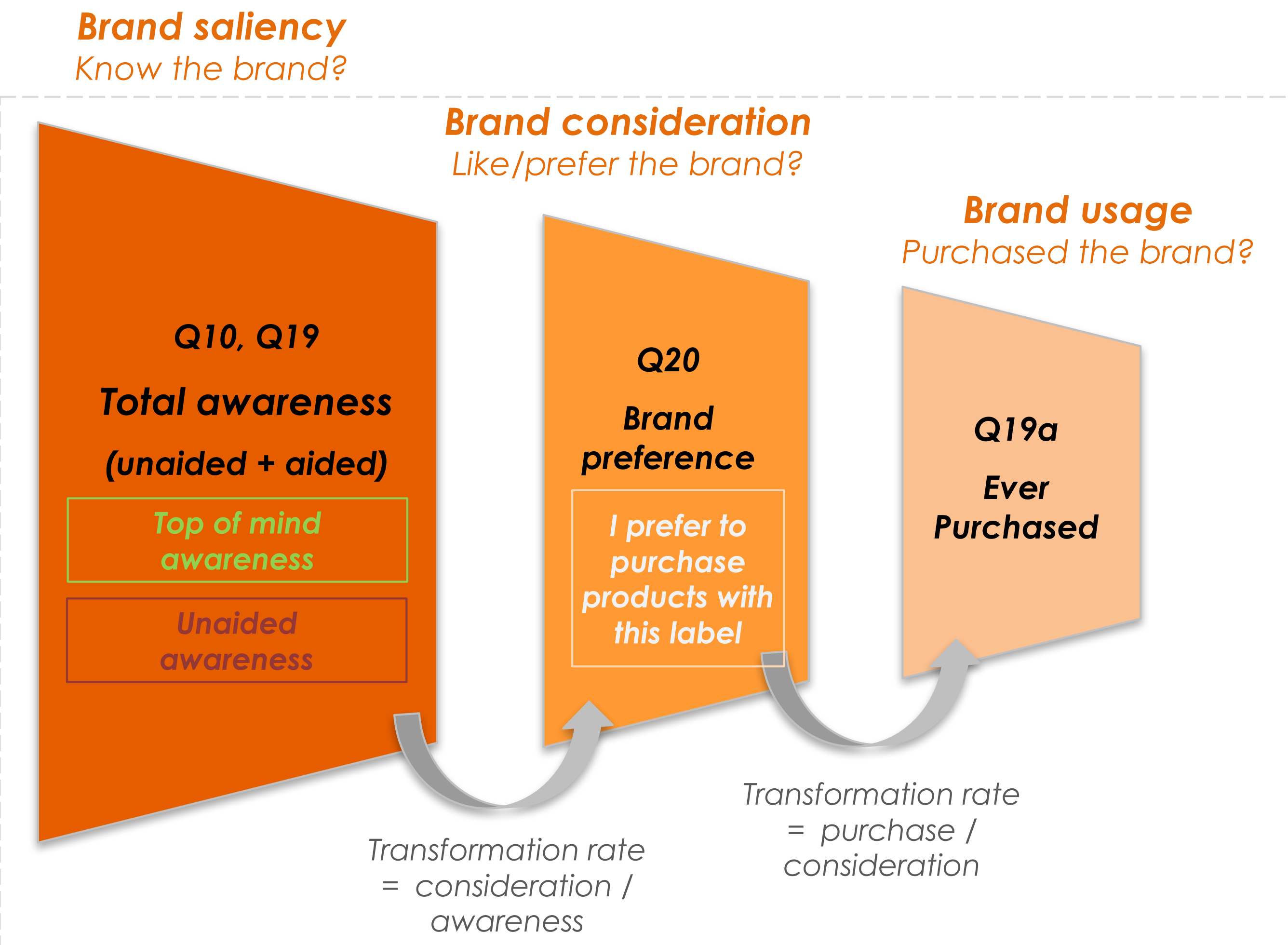
Q20. With regard to each of the following labels, using a scale from 1 to 5, where 1 means strongly disagree and 5 means strongly agree, to what extent do you agree these statements apply.



Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

Ethical logo purchase funnel

Q10. Please can you tell me what labels, endorsements or certifications dedicated to sustainability you are aware of?
Q19. Which of these logos, if any, do you recognise or have you ever seen/ heard of?
Q19a. Have you ever purchased any product with this label?
Q20. I prefer to purchase products with this label.



Note: this is not a traditional brand funnel, but is based on awareness, PREFERENCE for a label and then stated purchase behaviour. E.g. more people could purchase a label if the barriers are low (price, accessibility) than preferred to use.

Ethical logo purchase funnel

Fairtrade (Base: 115)

Total awareness, 8%

Unaided [1%] | Aided [7%]

57%

I prefer to purchase products with this label, 4.44%

78%

Have ever purchased products with this logo, 3.46%

FSC (Base: 102)

Total awareness, 6%

Unaided [1%] | Aided [4%]

60%

I prefer to purchase products with this label, 3.79%

100%

Have ever purchased products with this logo, 3.81%

Marine Stewardship Council (Base: 55)

Total awareness, 4%

Unaided [1%] | Aided [2%]

49%

I prefer to purchase products with this label, 1.98%

83%

Have ever purchased products with this logo, 1.64%

Aided awareness (First Mention)

Unaided awareness

Ethical logo purchase funnel

BTC TRADE FOR DEVELOPMENT

Proudly South African

Base: 1535

Total awareness, 90%

Unaided [5%] | Aided [64%]

79%

I prefer to purchase products with this label, 71.03%

119%

Have ever purchased products with this logo, 84.32%

WWF

Base: 275

Total awareness, 15%

Unaided [0.2%] | Aided [0.3%]

54%

I prefer to purchase products with this label, 8.25%

86%

Have ever purchased products with this logo, 7.06%

Not Tested on Animals

Base: 110

Awareness, 6%

Unaided [0.1%] | Aided [0.2%]

78%

I prefer to purchase products with this label, 4.43%

89%

Have ever purchased products with this logo, 3.93%

Aided awareness (First Mention)

Unaided awareness

Empirical Results
Fairtrade

Summary - Fairtrade

COMMUNICATION

Television is the channel most identified as the first source of information about Fairtrade. **Newspapers/ Magazines and Radio** are other popular sources of information about Fairtrade.

Overall, **six out of ten people would like to find out more about Fairtrade** and when given the definition, only **three in ten report that it was in line with what they already knew** about Fairtrade. After hearing the definition of Fairtrade, half of the people reportedly felt motivated to purchase products that are Fairtrade certified and four in ten said it aligned with their personal values.

FAIRTRADE PRODUCTS

There is a **noticeable decline** since 2013 (85% to 51%), in the proportion who rate the Fairtrade logo and Fairtrade products as **trustworthy.** Coupled with this is a **decline in the proportion of people who would consider a product or brand that is Fairtrade certified to be different** from products or brands that aren't certified, as well as a **decline in the perception of the quality of Fairtrade certified products.**

More than half of those interviewed feel that **Fairtrade certified products cost the same** as products that are not certified.

Summary - Fairtrade

PURCHASE BEHAVIOURS

Just over half reported to be **more likely to purchase a product if they see the Fairtrade logo** – a **decline since 2013**. Together with this, there is a noticeable **decline in the proportion of people who consciously look for products carrying the Fairtrade logo.** When they are **consciously looking for Fairtrade certified products**, it is **mainly for food products**, specifically coffee and tea or chocolates.

There is an **increase** in the proportion of people who report to be **willing to purchase Fairtrade products regardless of the cost or even if it is the most expensive** brand. Seemingly, **price is not the major influencing factor** reported by those measured.

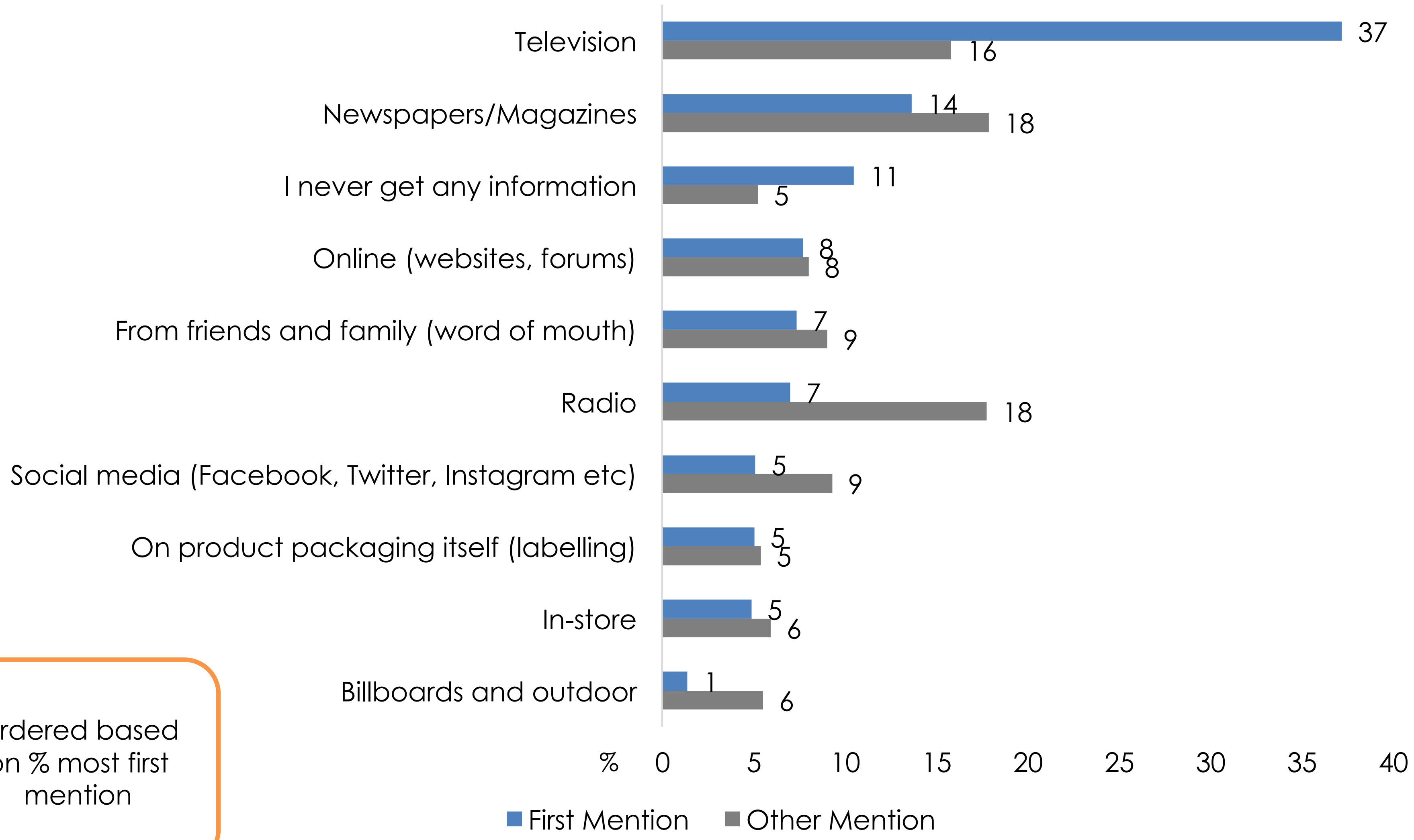
Fewer people than seen in 2013, would be **likely to buy Fairtrade certified products in the next year**.

Fairtrade: Appropriate channel communication

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q21. From where did you first come to know about Fairtrade?



Ordered based on % most first mention

Fairtrade: Focusing your marketing efforts

BTC TRADE FOR DEVELOPMENT

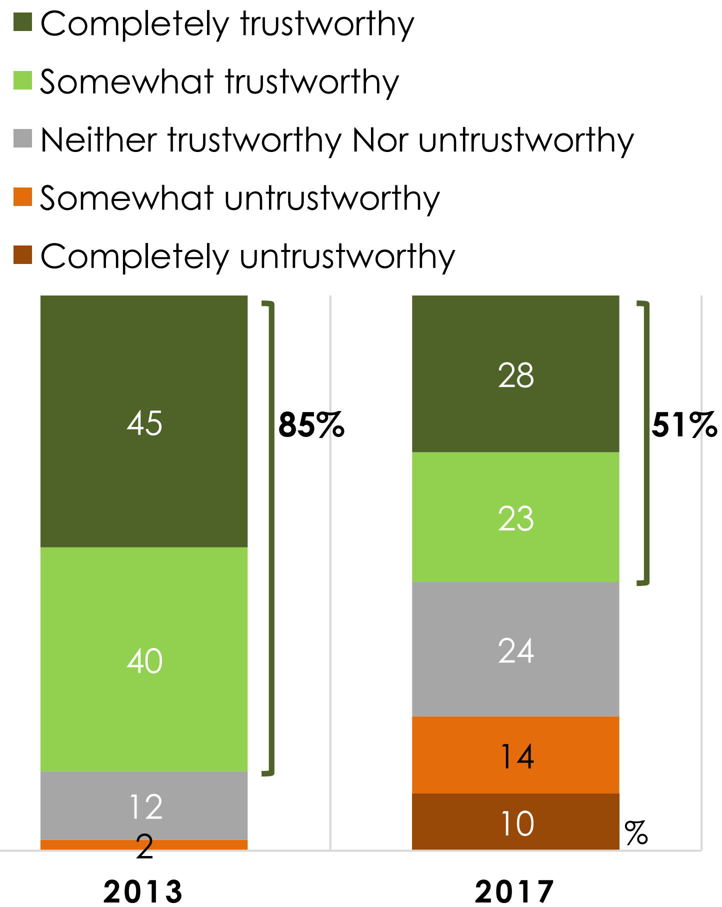
Base: n=1773

Q22. Thinking about the definition I have just given you, please rate each statement on a scale from 1 to 5, where 1 is strongly disagree and 5 is strongly agree, in terms of the extent these statements apply to ethically/ sustainably certified products.

Statement	Overall	Current Users of Fairtrade products	Potential Users of Fairtrade products	Rejecters of Fairtrade products
I would like to find out more about Fairtrade	62%	86%	67%	53%
This definition motivates me to purchase products that are Fairtrade certified	50%	79%	58%	38%
My personal values align with Fairtrade principles as described here	42%	67%	50%	29%
This is in line with what I've always known about Fairtrade	29%	50%	32%	22%

Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

Q27. Which statement best describes how you feel about Fairtrade and what their logo or products represent? Please use a 5 point scale where 1 means I do not find the Fairtrade logo or products trustworthy at all and 5 means you find the Fairtrade logo or products completely trustworthy



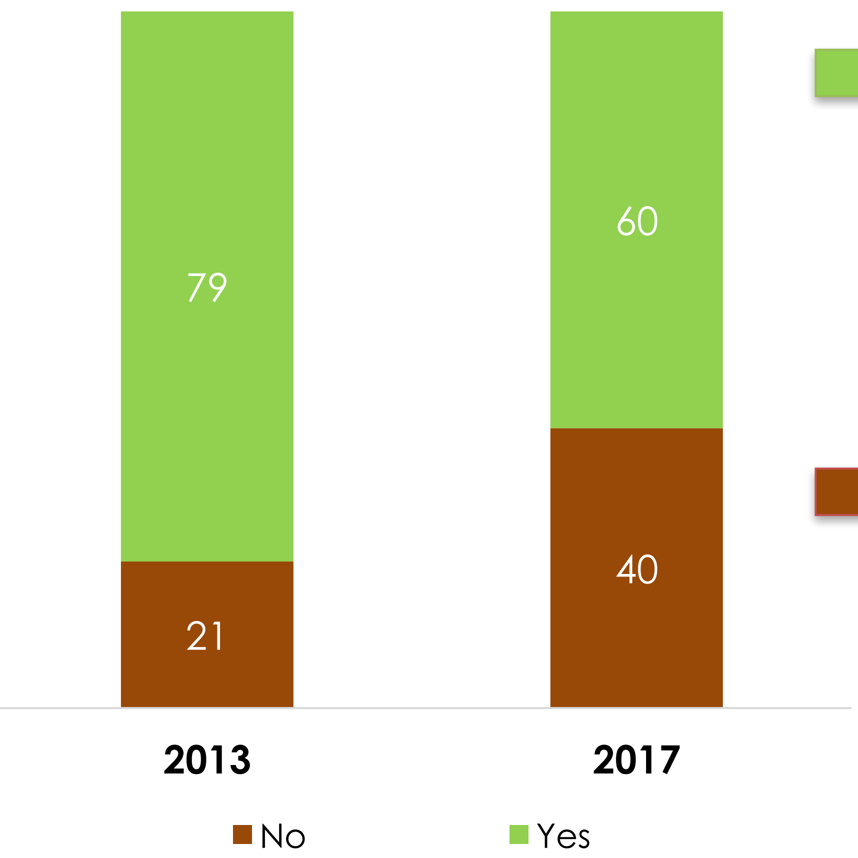
Fairtrade: Focusing your marketing efforts

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q23a. Would you consider a product or brand that is Fairtrade certified to be different from products or brands that aren't certified?

Difference of Fairtrade products



Q23b. In what way is the Fairtrade certified product different? (answer if yes in Q23a)

Reasons for being different (open-ended question)	% Mention
Better quality	**14.6**
It is certified	9.0
Helps disadvantaged communities	5.5
Has a Fairtrade logo on it	5.5
Good product	4.3
Natural product	3.4
More sustainable	3.0
Environmentally friendly	3.0

Q23c. Why do you say that? (answer if no in Q23a)

Reasons for not being different (open-ended question)	% Mention
I don't know/ recognise the logo	53.5
Basically the same, just different names	**13.2**
I trust the brands I usually use	5.6
I have never heard of it	3.1
Not well known	1.7
Have no preference	1.6
All products are certified	1.5
Do not offer anything new	1.4
More sustainable	1.2

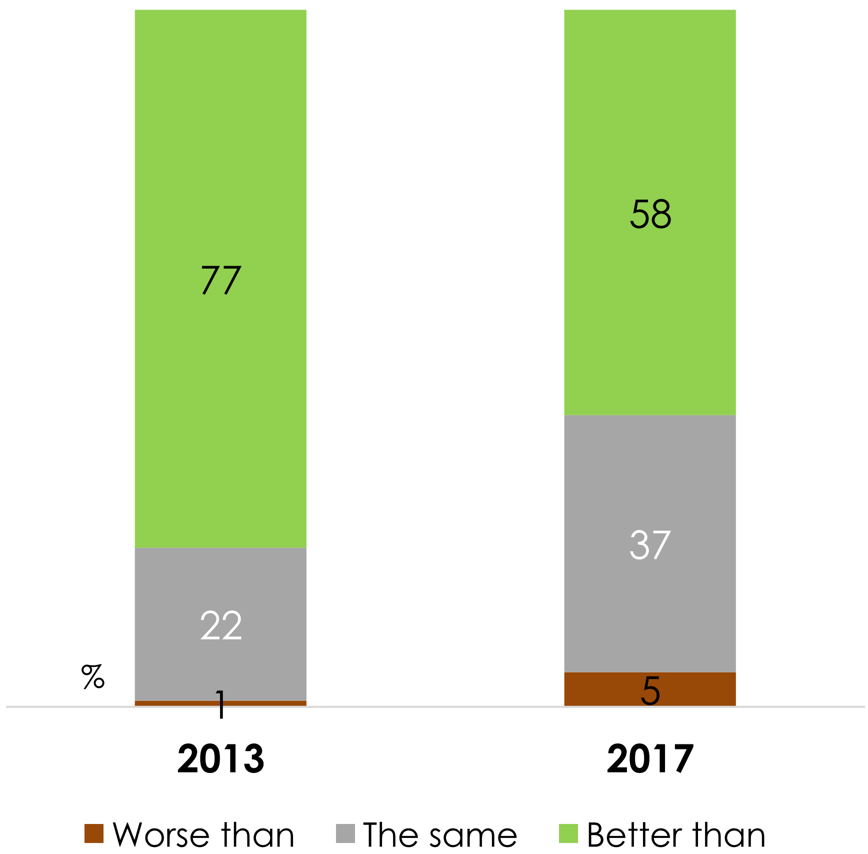
Fairtrade: Focusing your marketing efforts

BTC TRADE FOR DEVELOPMENT

Base: n=1773

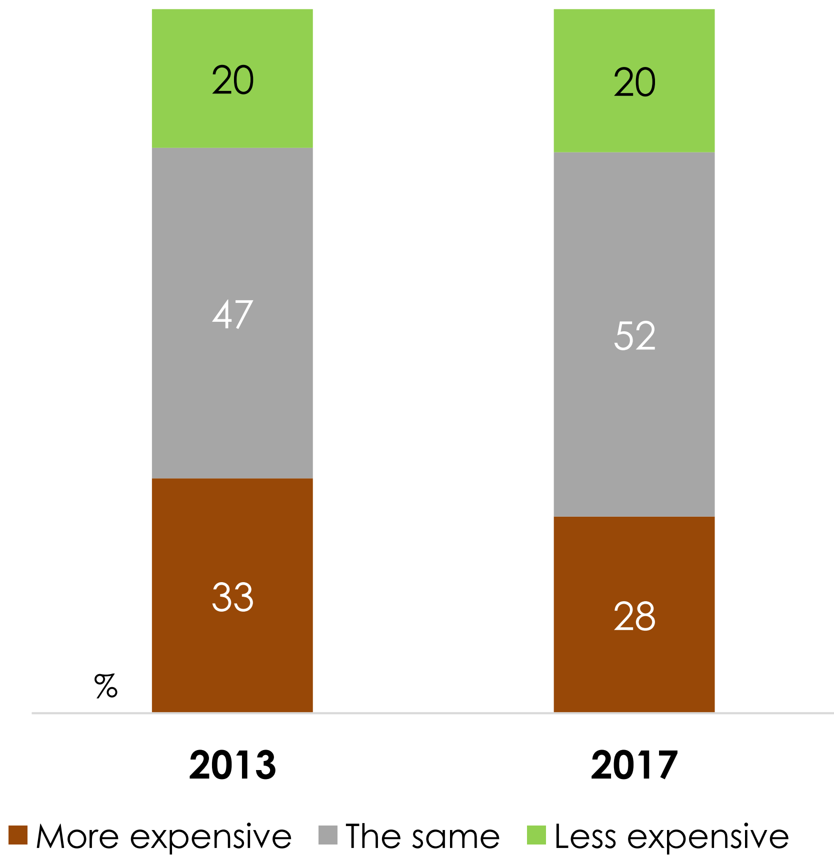
Q24a. When thinking about the quality of products, do you expect Fairtrade certified products to be better quality, the same quality, or worse quality than other products or brands that are not Fairtrade certified?

Quality of Fairtrade products



Q24b. When thinking about the price of products, do you expect Fairtrade certified products to be more expensive, have the same cost, or less expensive than products or brands that are not Fairtrade certified

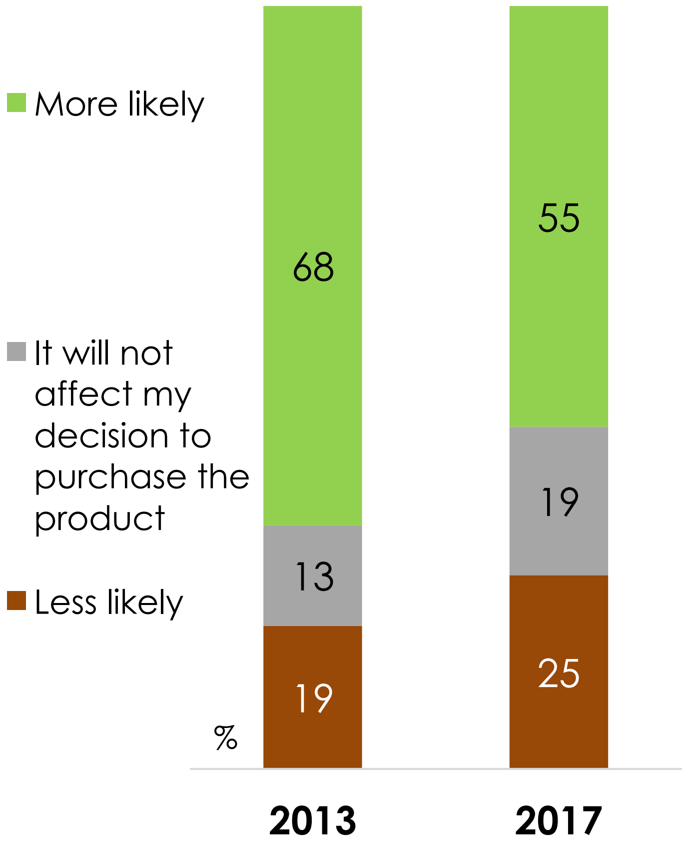
Price of Fairtrade products



Fairtrade: Focusing your marketing efforts

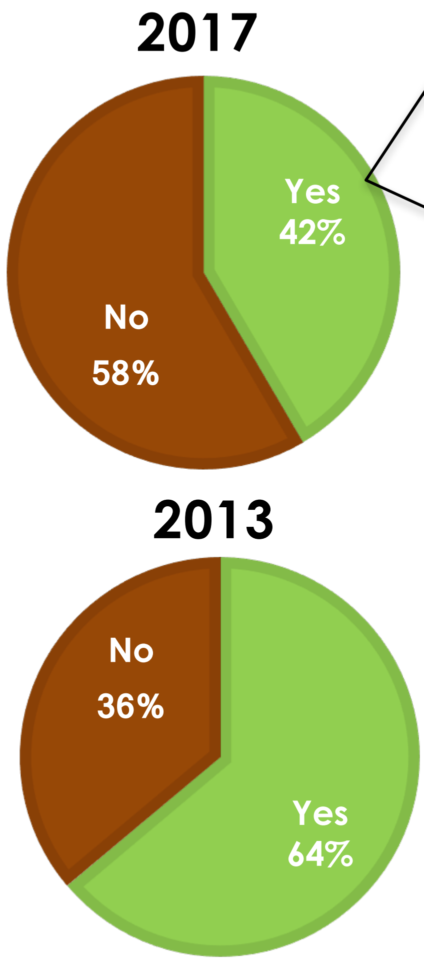
BTC TRADE FOR DEVELOPMENT

Q25. How likely are you to purchase a product if you see the Fairtrade logo?



Base: n=1773

Q26. Do you consciously purchase any products carrying the Fairtrade logo?



Q27a. Which products carrying the Fairtrade logo, do you purchase? (open-ended question – ask if yes in Q26)	% Mention
Clothing	10.9
Coffee and tea	**7.9**
Dairy products	**6.0**
Cadbury chocolates	**5.7**
Ingram camphor cream	4.5
I&J	**4.4**
Food products	**3.8**
Fruit	**3.8**
Cereals	**3.3**
Toiletries	2.6
Crystal valley	2.6
Tinned beans	**2.6**
Poultry	**2.6**
Clover	**2.5**
Chicken	**2.3**
Rama Margarine	**2.0**
Chocolates	**1.9**

When combining the separate food products with the overall food product category, food and beverages up first (45%)

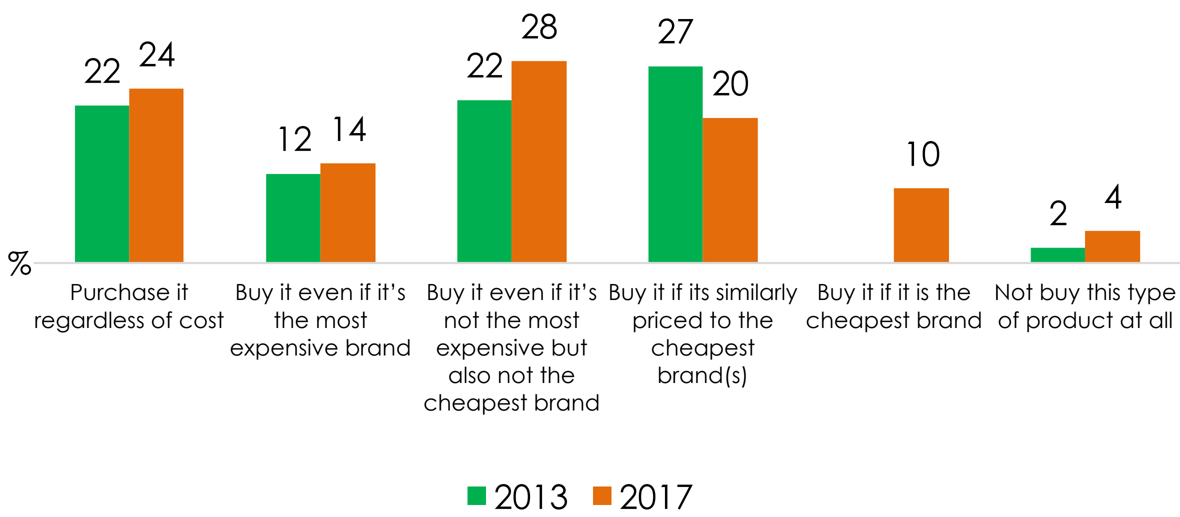
Base: n=115

Fairtrade: Focusing your marketing efforts

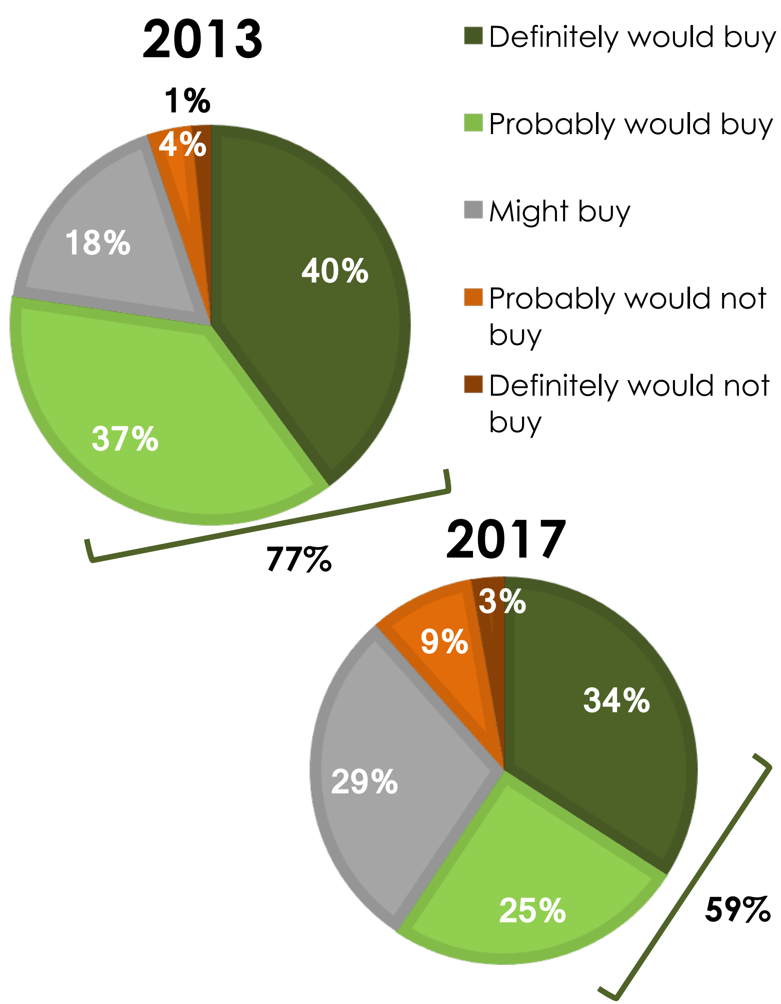
BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q29. Assuming Fairtrade products were available where you shop, how much would you be willing to pay for such brands? Would you…



Q28. Assuming that a Fairtrade certified product was available in the store where you regularly shop, which phrase best describes how likely you would be to buy this product in the next 12 months?



Empirical Results
Path to being a user

Path to being a user

BTC TRADE FOR DEVELOPMENT

Summary

CURRENT USERS

Typical **current users** of Fairtrade certified products are **Black or White**, more likely to be **Male**, and living in **Gauteng** or the **Western Cape.** The proportion of people who make up this segment has **decreased since 2013** (6% to 3%).

POTENTIAL USER SEGMENT

The proportion of potential users has also **declined since 2013** (72% to 57%)**.** A typical potential user of Fairtrade certified products is more likely to be **Female**; **Black, White or Coloured**; representing a **spread of ages** and living in **Gauteng, the Western Cape or the Eastern Cape.**

REJECTORS

The proportion of people who are **unlikely to purchase Fairtrade certified products has almost doubled since 2013** (22% to 40%)**.** This group is more likely to be **Female**; **Black, White or Coloured**; and living in **Gauteng, the Western Cape, the Eastern Cape or KZN.**

Path to being a user

Summary

DISCRIMINATING ATTITUDES BETWEEN SEGMENTS

When looking at the specific **attitudes which are more likely to determine whether or not a person <u>will be a user</u>** (current or potential) of Fairtrade certified products; their willingness to **pay more for quality products, familiarity with the concept “environmentally friendly”** as well as their habit of **reading the labels and statements on the product packaging** have the greatest impact.

Attitudes which discriminate **<u>a current user</u> of Fairtrade certified products** are identified as being their **familiarity with Fairtrade Tourism** as well as being **willing to go out of their way to find sustainable products/ sustainably produced products** in store.

Sample profile

BTC TRADE FOR DEVELOPMENT

Current User of Fairtrade products

3% [6%]

Typical current users are:

52 %

48 %

Race: Black and White

Age: 35 – 49 years
25 – 34 years

LSM: 7,6 and 9

Employment Status:
Full-time, Part-time and Unemployed - looking for work

Province:
Gauteng and Western Cape

Type of household shopper: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

Top 5 retailers where purchased product type
Shoprite, Pick 'n Pay Supermarket, Checkers, Spar, Woolworths

Potential User of Fairtrade products

57% [72%]

A typical potential user is:

49 %

51 %

Race: Black, White and Coloured

Age: 35 – 49 years
50+ years, 25 – 34 years and 18 – 24 years

LSM: 7,6 and 8

Employment Status:
Full-time, Part-time, Student/learner and Unemployed - looking for work

Province:
Gauteng, Western Cape and Eastern Cape

Type of household shopper: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

Top 5 retailers where purchased product type
Shoprite, Checkers, Pick 'n Pay Supermarket, Spar, Woolworths

Rejector of Fairtrade products

40% [22%]

A typical rejector is:

47 %

53 %

Race: Black, White and Coloured

Age: 25 – 34 years
35 – 49 years
50+ years

LSM: 7 and 6

Employment Status:
Full-time, Part-time and Unemployed - looking for work

Province:
Gauteng, Western Cape, Eastern Cape and Kwazulu-Natal

Type of household shopper: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

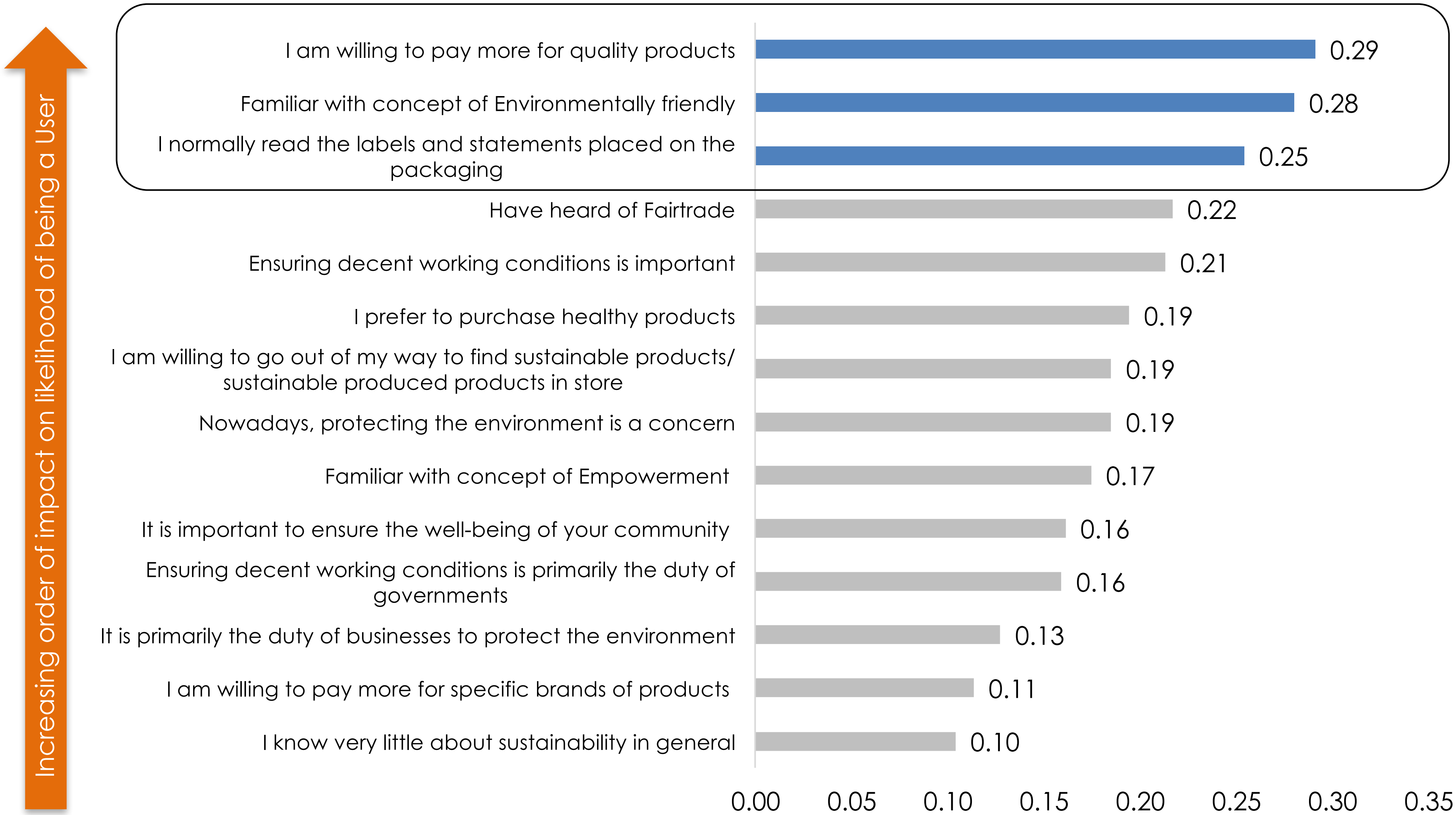
Top 5 retailers where purchased product type
Shoprite, Checkers, Pick 'n Pay Supermarket, Spar, Clicks

Path to being a user

BTC TRADE FOR DEVELOPMENT

Discriminating attitudes between current and potential users, and rejecters: Discriminant analysis

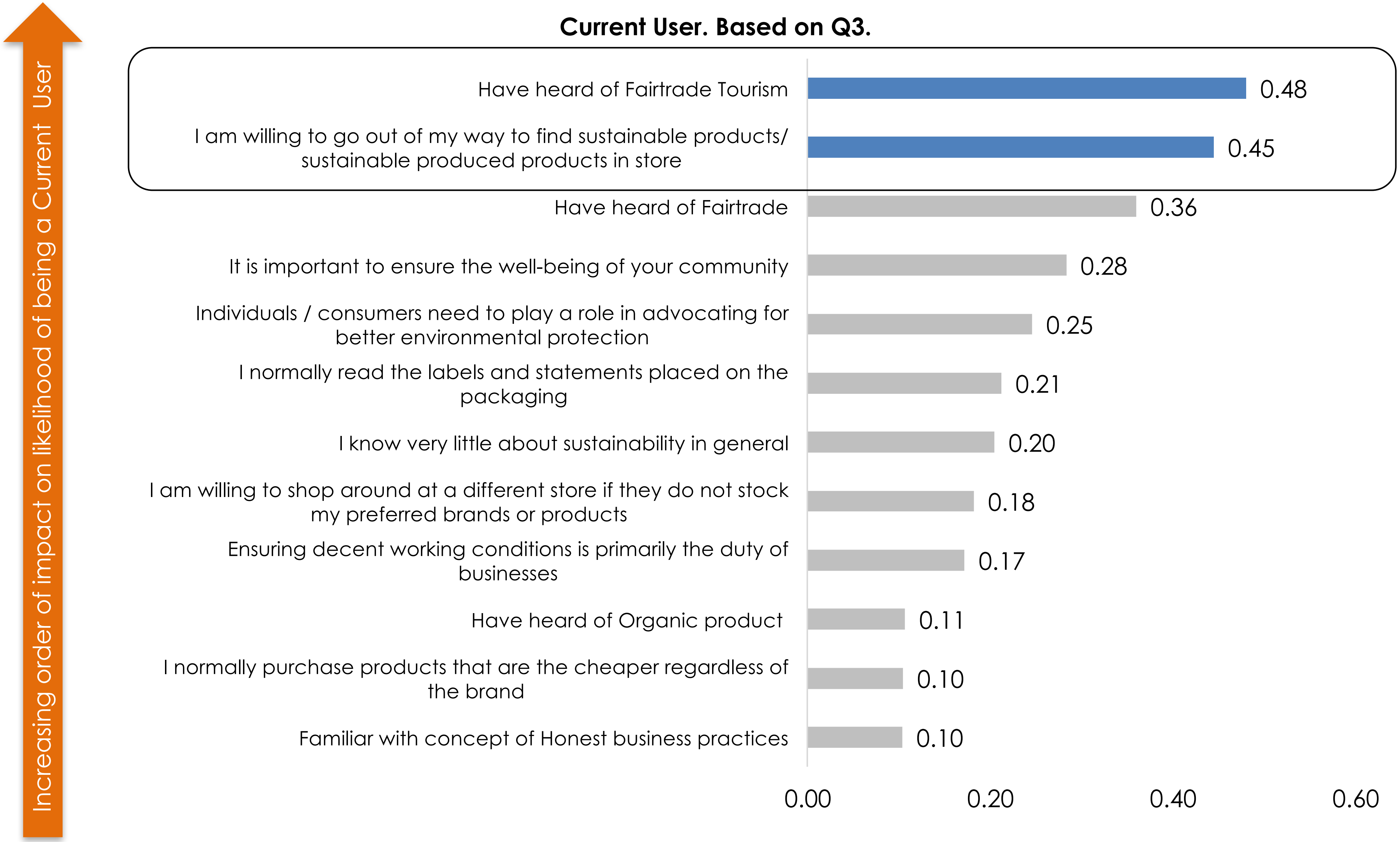
Current & Potential Users Combined. (Based on Q3)



Path to being a current user

Discriminating attitudes between current users and non-current users: Discriminant analysis

Current User. Based on Q3.



BTC TRADE FOR DEVELOPMENT

ASK AFRIKA™
DARE TO KNOW

Empirical Results
Ethical Consumers and Businesses

Summary

VALUES

When it comes to rating the **values related to the importance of and responsibility for the sustainability behaviours**; overall, **consumers agree more with the values from their own perspective** than they agree **that business would align with those values.**

The **order of the values which are rated more highly by the consumers**, however, are the **same when it relates to consumers as when it relates to businesses.** The values identified as top priority for both consumers and businesses include, ensuring the **well-being of the community**; ensuring **decent working conditions** as well as acknowledging the **importance of economic and social equality.**

RETAILER BEHAVIOUR

Fewer consumers are holding retailers accountable for promoting sustainability. Consumers' perception that the **retailers should focus on sustainable products** by clearly displaying and making it easier to identify sustainably certified products in store, informing consumers about sustainability, and giving preference to and stocking more sustainable products **has declined since 2013,but still remains high** (76% - 80%).

Summary

CONSUMER BEHAVIOUR

When deciding on which products to purchase, consumers are mostly concerned with **healthy** options, the **quality** of the products as well as the **value for money**. Labels and statements placed on packaging, as well as sustainable/ sustainably produced products are reportedly not as important.

Among the **current user segment**, the **labels and statements on the packaging**, as well as the **sustainability** of the product are more important. For **potential users,** the **labels and statements** on the packaging is slightly more important. **Rejecters** are driven by price - rating **value for money** and being the **cheapest product** as more important.

CERTIFIED PRODUCT PERCEPTION

The perception of **ethically/ sustainably certified products** is that they are **safer,** are products that **can be trusted** and **provide consumers with peace of mind.** This is a positive movement and shift in perception since 2013.

The perception that ethically/ sustainably certified products are **more expensive, difficult to find or not available** where they shop have **declined significantly since 2013.**

Ethical Consumers and Businesses: Values

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q3. I am going to read out some statements that people have made about sustainability in general. For each please tell me to what extent you agree or disagree with that statement. There are no right or wrong answers - we just want to know your opinion. Now, to what extent do you agree or disagree that...?

Q4. I am going to read out some more statements that people have made about sustainability in general. For each please tell me to what extent South African businesses align with these statements.

	Regarding Businesses (Q4)	Regarding Consumers (Q3)			
	Overall	Overall	Among Current Users n = 51	Among Potential Users n = 1045	Among Rejecters n = 677
It is important to ensure the well-being of your community/ the community you operate in	**78%**	**83%**	95%	87%	76%
Ensuring decent working conditions is important	**76%**	**83%**	84%	87%	83%
Economic and social equality is important	**76%**	**82%**	89%	86%	76%
The current generation should take care of resources for the future	**73%**	**82%**	83%	85%	77%
It is important to support products made in South Africa using local materials and ingredients	**71%**	**82%**	81%	85%	77%
Individuals / consumers need to play a role in advocating for better environmental protection	**71%**	**79%**	90%	83%	73%
Individuals / consumers need to play a role in advocating for decent working conditions	**70%**	**77%**	72%	81%	71%

Showing top 2 scores % (4 = Agree and 5 = Strongly Agree)

Ranked from high to low based on the 'Businesses overall' column

Ethical Consumers and Businesses: Values

Base: n=1773

Q3. I am going to read out some statements that people have made about sustainability in general. For each please tell me to what extent you agree or disagree with that statement. There are no right or wrong answers - we just want to know your opinion. Now, to what extent do you agree or disagree that...?

Q4. I am going to read out some more statements that people have made about sustainability in general. For each please tell me to what extent South African businesses align with these statements.

	Regarding Businesses (Q4)	Regarding Consumers (Q3)			
	Overall	Overall	Current Users n = 51	Potential Users n = 1045	Rejecters n = 677
Ensuring decent working conditions is primarily the duty of businesses	**70%**	**74%**	82%	77%	68%
Nowadays, protecting the environment is a concern	**69%**	**79%**	76%	84%	72%
It is primarily the duty of businesses to protect the environment	**67%**	**66%**	68%	71%	60%
It is primarily the duty of governments to protect the environment	**65%**	**67%**	70%	70%	62%
Ensuring decent working conditions is primarily the duty of governments	**64%**	**67%**	58%	73%	60%
I/ businesses know very little about sustainability in general	**47%**	**60%**	67%	62%	57%
Sustainability is not a priority for me/ businesses at this time	**42%**	**42%**	42%	42%	42%

Showing top 2 scores % (4 = Agree and 5 = Strongly Agree)
Ranked from high to low based on the 'Businesses overall' column

SA retailer behaviour

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q5. I am going to read out some phrases that could be used to describe the general behaviour of South African retailers. Please state the extent to which you agree or disagree with each statement.

South African retailers should…	2013 Overall	2017 Overall	2017 Current Users n = 51	2017 Potential Users n = 1045	2017 Rejecters n = 677
…make it easier to identify the sustainable products in store	87%	80% ↓	90%	83%	75%
…do more to inform consumers about sustainability	86%	80% ↓	80%	84%	75%
…clearly display and advertise sustainably certified products within the store	86%	79% ↓	83%	82%	73%
…stock more sustainably certified products	84%	78% ↓	81%	82%	78%
… provide incentives for consumers to buy sustainable products, i.e. shopper/ loyalty points	-	77%	75%	80%	77%
… give preference to sustainable products in store	81%	76% ↓	83%	79%	71%

Ranked from high to low based on 2017 Overall
Showing top 2 scores % (4 = Agree and 5 = Strongly Agree)

SA consumer behaviour

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q8. Now we would like to understand what you look for in products when you shop. I am going to read out some statements about how people shop - for each please tell me to what extent that statement applies to you - does it completely apply, partly apply, or not apply at all?

Showing top scores (5 = Completely applies)

Product attributes	Statements used
Health options	**I prefer to purchase healthy products**
Quality	**I am willing to pay more for quality products**
Value for money	**I usually look out for the best value for money purchases**
Brand	I am willing to shop around at a different store if they do not stock my preferred brands or products I am willing to pay more for specific brands of products
Packaging	I normally read the labels and statements placed on the packaging
Sustainability	I put effort into purchasing sustainable products / or sustainably produced products I am willing to go out of my way to find sustainable products/ sustainable produced products in store
Cheapest	I normally purchase products that are the cheaper regardless of the brand

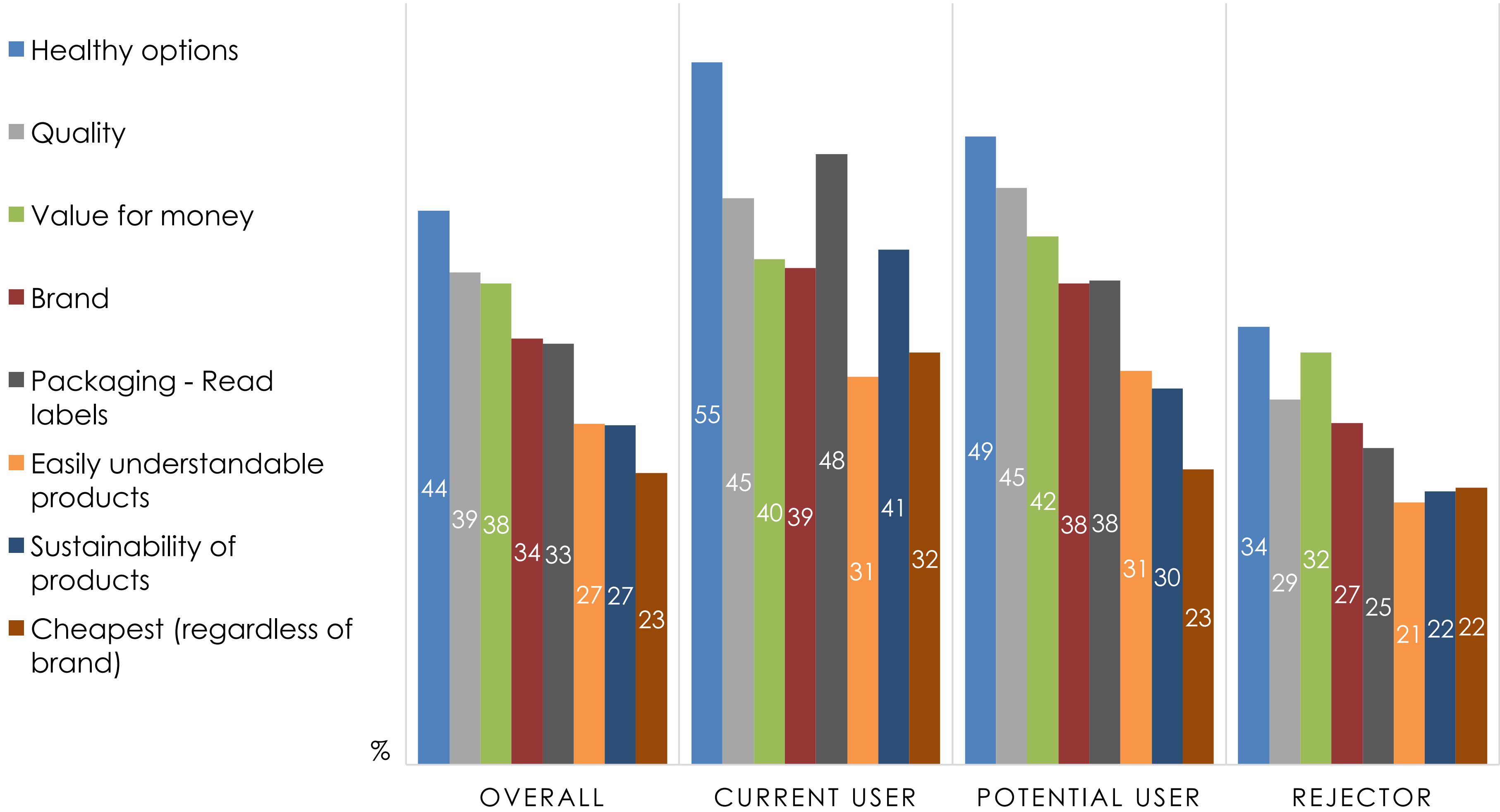
27% of respondents agree that it is easy to understand which products are sustainably produced or manufactured

SA consumer behaviour

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q8. Now we would like to understand what you look for in products when you shop. I am going to read out some statements about how people shop - for each please tell me to what extent that statement applies to you - does it completely apply, partly apply, or not apply at all?



Showing top scores (5 = Completely applies)

Perception of certified and uncertified products

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q12. I am going to read out a list of statements that people have made about manufacturers, products and brands. For each statement please tell me on a scale from 1 to 5, where one is strongly disagree and 5 is strongly agree, the extent these statements apply to ethically/ sustainably certified products.

Compared to uncertified products, ethically/ sustainably certified products are…?	2013	2017
Safer for me and my family	**79%**	**83%** ↑
Products I trust	**-**	**82%**
Products that provide me with peace of mind	**-**	**79%**
Of higher quality	75%	78% ↑
Better value for money	71%	77% ↑
Beneficial to the local community where it was produced	78%	77%
Produced in an environment that respects and protects the environment	76%	77%
Produced in an environment that respects and protects the rights of workers	75%	76%
Easy to identify on shelf	59%	72% ↑
Made using sustainable and ethical production methods	72%	72%
Products I aspire to	72%	72%
Supportive to small-scale farmers	79%	70% ↓
Worth paying more for	63%	66% ↑
More expensive	51%	46% ↓
Difficult to find	50%	34% ↓
Not available where I shop	41%	30% ↓

***Showing top 2 scores (4 = Agree and 5 = Strongly Agree)**

↑ Significant increase ↓ Significant decrease

Perception of certified and uncertified products

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q12. Compared to uncertified products, ethically/ sustainably certified products are…?

Current Users	Potential Users	Rejecters
Safer for me and my family, 95%	Safer for me and my family, 87%	Safer for me and my family, 77%
Products I trust, 92%	Products I trust, 86%	Products I trust, 75%
Easy to identify on shelf, 91%	Products that provide me with peace of mind, 84%	Beneficial to the local community where it was produced, 73%
Products that provide me with peace of mind, 89%	Better value for money, 82%	Of higher quality, 73%
Of higher quality, 81%	Produced in an environment that respects and protects the environment, 81%	Produced in an environment that respects and protects the rights of workers, 72%
Produced in an environment that respects and protects the environment, 80%	Of higher quality, 81%	Products that provide me with peace of mind, 71%

*Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

Empirical Results
Sustainable Retailers, Brands and Product Categories

Sustainable Retailers, Brands and Product Categories

Summary

RETAILERS

Most of the retailers are perceived as stocking sustainable products in store. **OK Megasave, Woolworths and Pick 'n Pay Supermarket** are ranked the top 3. Spaza shops are not identified as stocking sustainable products.

BRANDS

Nike, Koo, Coca-Cola, Woolworths and Adidas are top of mind brands when consumers think of sustainability.

PRODUCTS

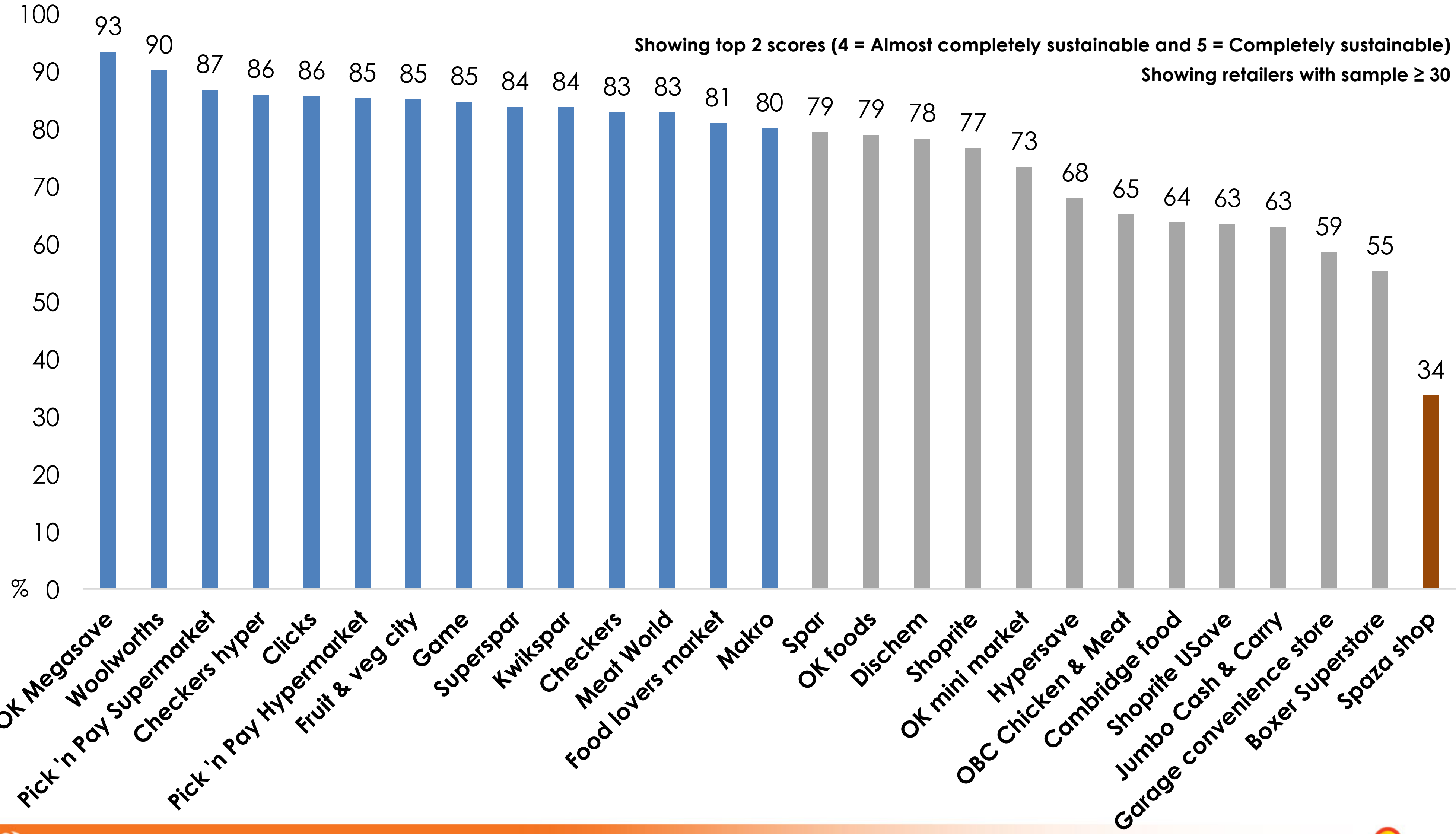
Fresh Produce remains the product category consumers most **expect and would like to be ethical/ sustainable**. Across all product categories, there is an **increase in consumers reporting that they do currently purchase products in those categories that are sustainable**. The largest being **Fresh Produce, Dairy Products** and **Meat and Poultry**.

Overall, **sustainable fresh produce and dairy products** are most likely to be bought from **Spar** (Superspar and Kwikspar) and **Food Lover's Market.** Sustainable **meat and poultry** is mostly bought from **Spar.**

SA retailers sustainability

Base: n=1773

Q7. How would you rate the following retailers on a scale from 1 to 5, where 1 means not sustainable and 5 means completely sustainable, with regards to the products they stock in store?



Brand sustainability

Base: n=1773

Q9. Can you tell me which brands come to your mind when you think of sustainability? (open-ended question)

First Mention	%	Other Mention	%
KOO	**4.7**	**Coca-Cola**	**4.1**
Coca-Cola	**4.5**	**KOO**	**3.6**
Tiger Brands	4.4	Shoprite house brand (Rite Brand)	2.5
Woolworths	3.5	Clover	2.5
Shoprite house brand (Rite Brand)	2.8	Unilever	2.3
Pick n pay no name	2.2	Pick n pay no name	2.0
Clover	2.1	Tiger Brands	1.8
Albany	1.5	Woolworths	1.8
Nike	1.2	Albany	1.6
Tastic	1.2	None	1.6
Kellogg's	1.2	Kellogg's	1.4
Unilever	1.2	Nike	1.3
Adidas	1.1	Samsung	1.2
Sasko bread	1.0	Sasko bread	1.1
Samsung	0.9	All Gold	1.1
Parmalat	0.9	Tastic	0.9

Q10. Please can you tell me what labels, endorsements or certifications dedicated to sustainability you are aware of? (open-ended question)

First Mention	%	Other Mention	%
Nike	**5.4**	**None**	**7.2**
None	**3.2**	**Adidas**	**6.6**
Adidas	**2.9**	**Nike**	**3.9**
Proudly made in South Africa/ Proudly SA	2.9	Puma	2.9
Woolworths	2.3	Levis	2.0
SABS	1.5	Woolworths	1.8
Coca-Cola	1.5	Proudly made in South Africa/ Proudly SA	1.8
KOO	1.4	Pick n Pay No Name	1.3
Levis	1.3	Coca-Cola	1.2
Pick n Pay No Name	0.9	Shoprite house brand (Rite brand)	1.2
Clover	0.7	Checkers Hyper	1.0
Puma	0.7	Fresh fruit and vegetables	1.0
Shoprite house brand (Rite brand)	0.7	KOO	1.0
Fairtrade	0.6	Reebok	1.0
Guess	0.6	Guess	0.8
Uzzi	0.6	Defy	0.8

Product category sustainability

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Product category	Q11a. What kind of products, if any, would you currently expect to be sustainable or ethical? Expect to be sustainable 2017	2013	Q11b.What kind of products would you like to be ethical/ sustainable? Like to be sustainable 2017	2013
Fresh produce	14.4%	15.8%	13.0%	14.9%
Meat and poultry	13.6%	10.2%	12.8%	10.3%
Dairy products	12.9%	14.9%	12.1%	14.3%
Clothing and footwear	11.2%	8.0%	10.4%	8.9%
Packaged grocery products	10.2%	11.3%	10.7%	10.7%
Personal care (incl. toiletries and makeup)	10.0%	9.8%	9.4%	9.7%
Coffee and tea	8.4%	9.7%	9.2%	9.1%
Household cleaning products	8.2%	15.8%	8.8%	10.2%
Wine and spirits	5.2%	4.9%	6.3%	5.8%
Chocolate	5.0%	5.4%	6.4%	6.1%

*Excluding "None of these"

Product category sustainability

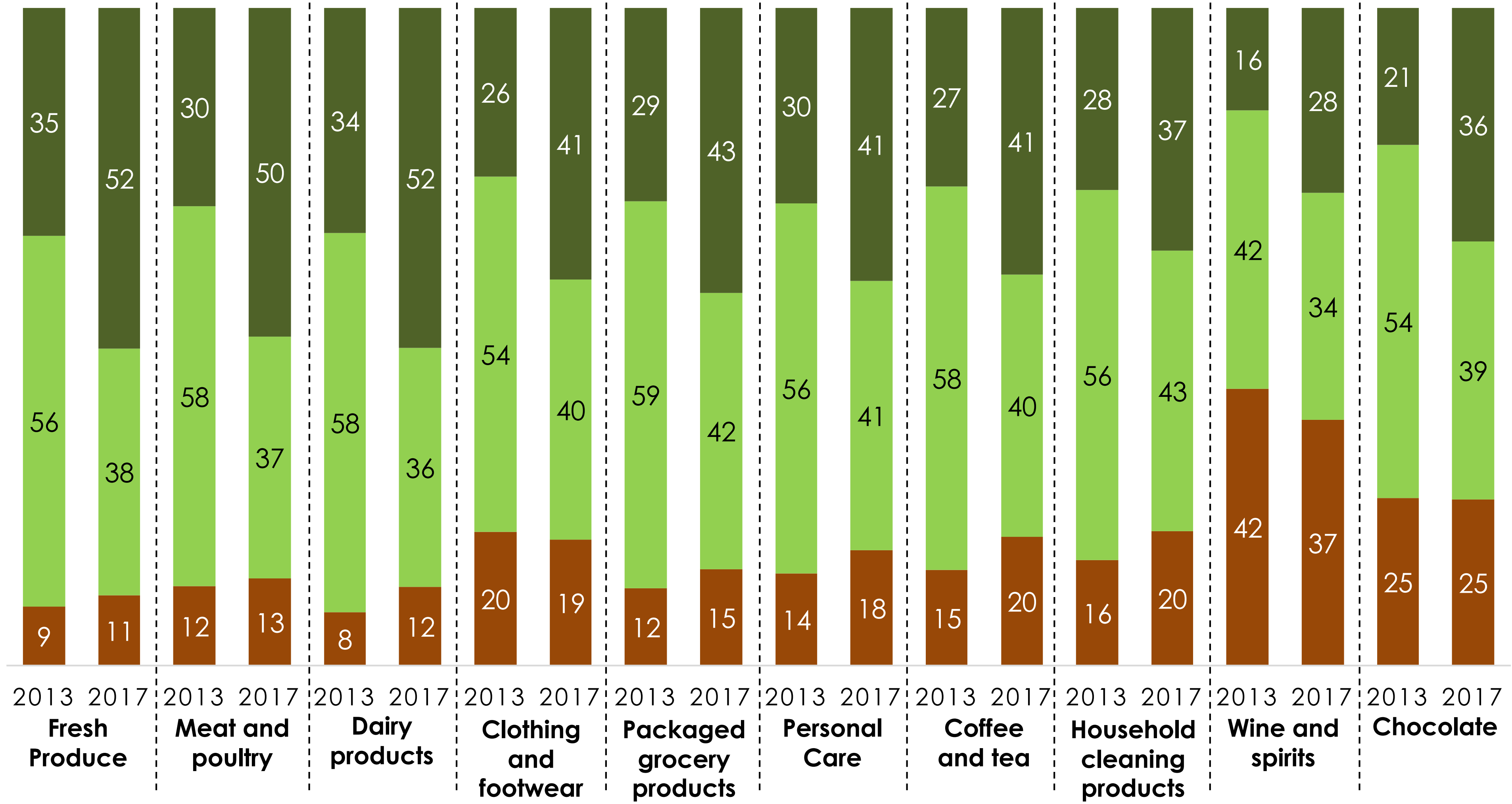
BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q13. Which of these statements best describes your intentions regarding…

Ranked based on expected to be sustainable (2017).

- I purchase products in this category that are sustainable
- I would like to purchase products in this category that are sustainable
- I do not care to buy products in this category that are sustainable



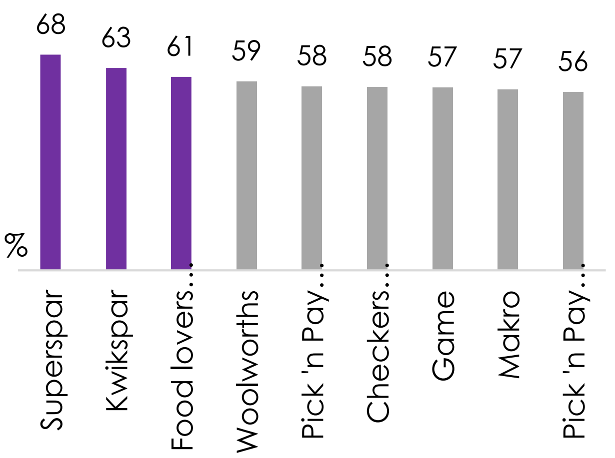
Product category sustainability

Overall: Retailers bought from per category

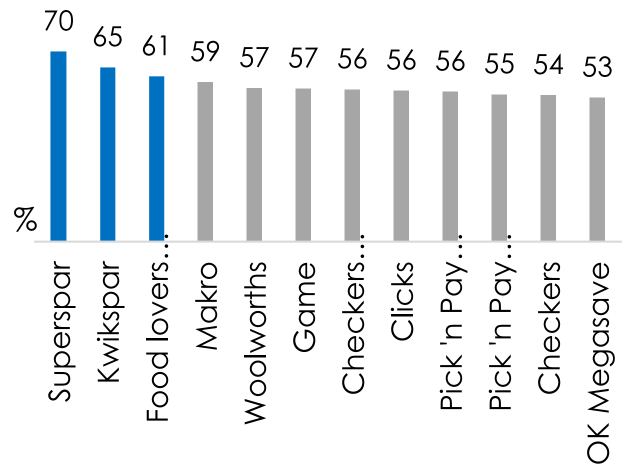
Base: n=1773

Ordered by most sustainable product category; Retailers ordered by % of sustainable products bought from. Only included those retailers where "I purchase products in this category that are sustainable" > 50% Only showed top 14 sustainable retailers where necessary.

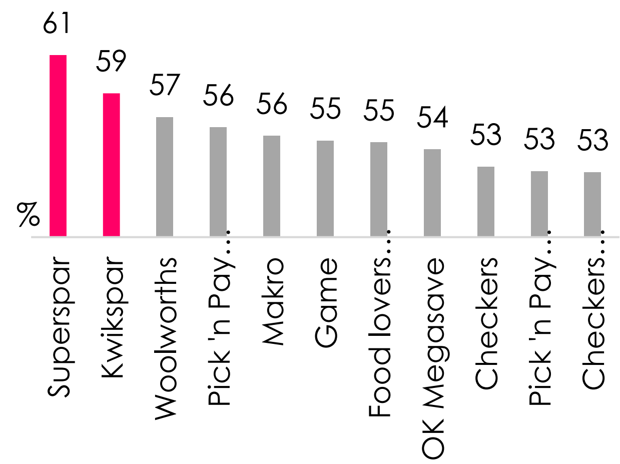
1. Fresh Produce (52%)



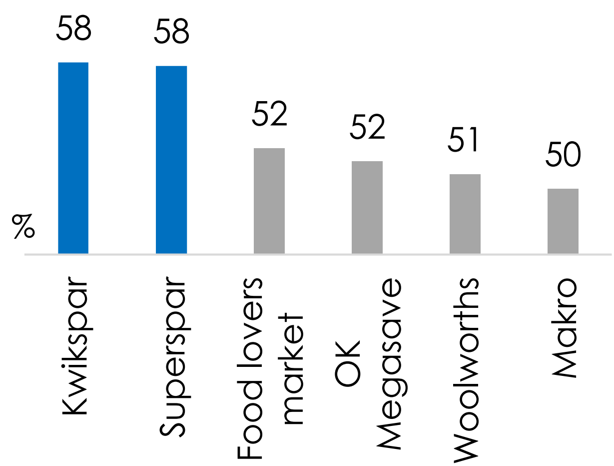
2. Dairy products (52%)



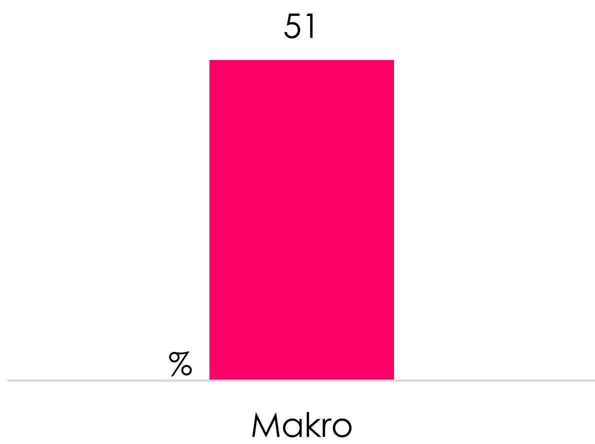
3. Meat and poultry (50%)



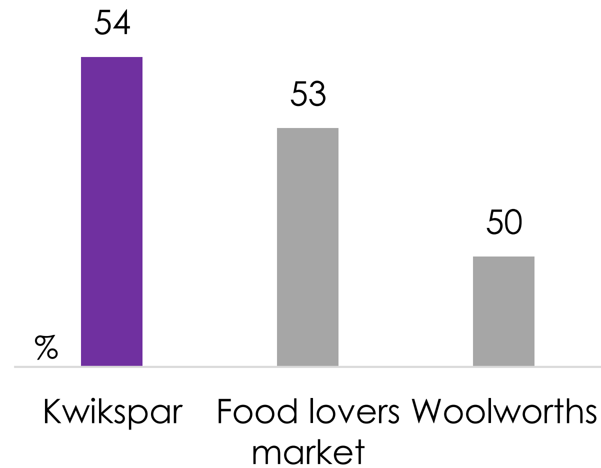
4. Packaged grocery products (43%)



5. Clothing and footwear (41%)



6. Coffee and tea (41%)



***Showing % of "I purchase products in this category that are sustainable" from Q13.**

Product category sustainability

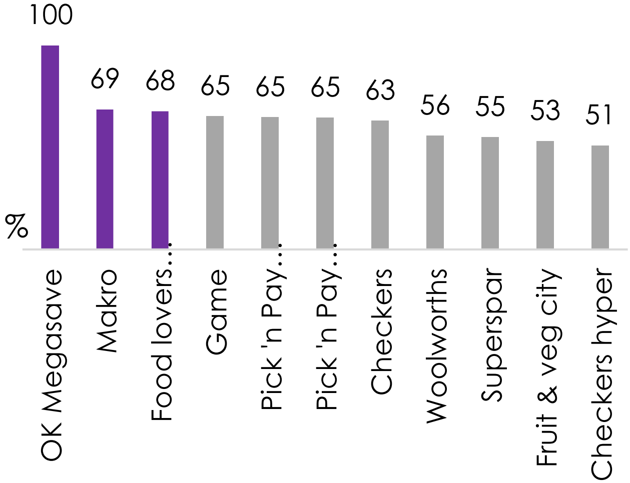
Current Users: Retailers bought from per category

BTC TRADE FOR DEVELOPMENT

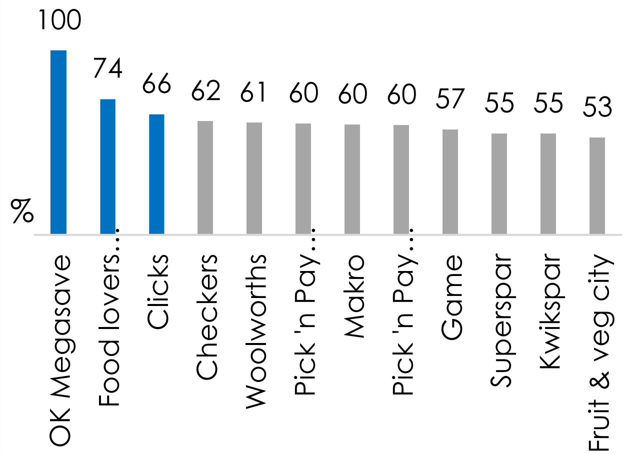
Base: n=51

Ordered by most sustainable product category; Retailers ordered by % of sustainable products bought from. Only included those retailers where "I purchase products in this category that are sustainable" > 50% Only showed top 14 sustainable retailers where necessary.

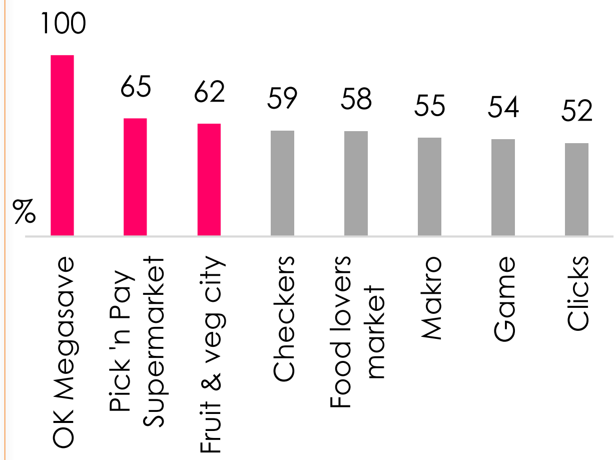
1. Fresh Produce (61%)



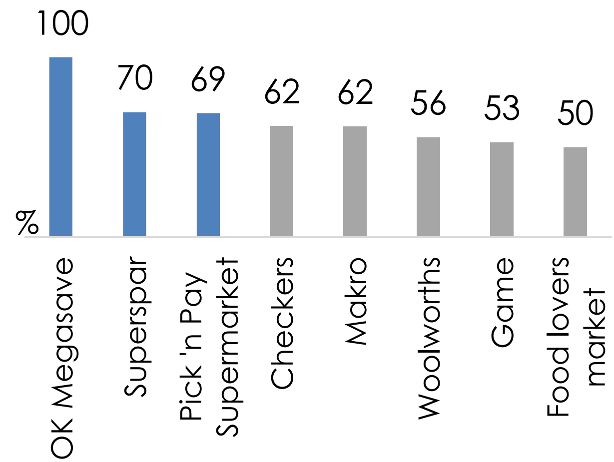
2. Packaged grocery products (60%)



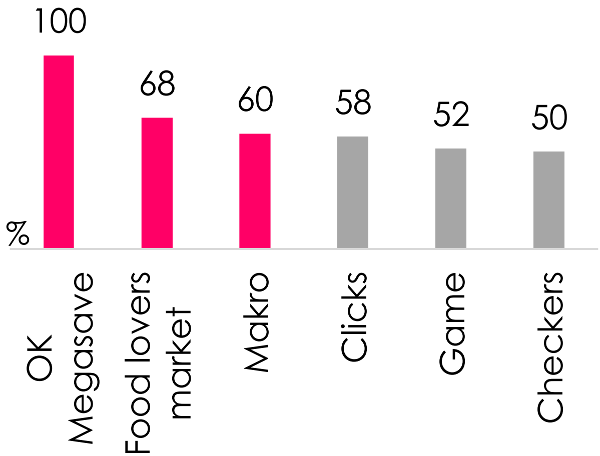
3. Dairy products (58%)



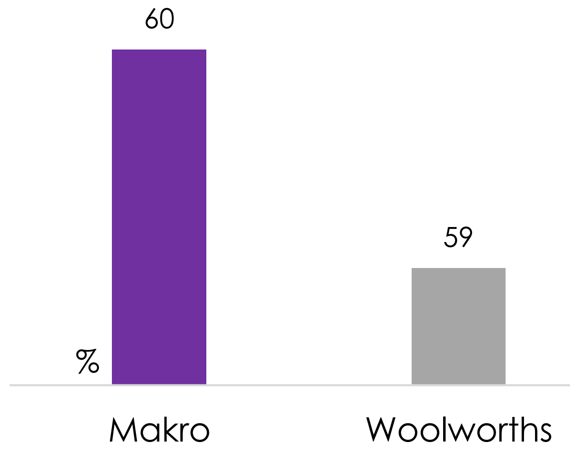
4. Meat and poultry (58%)



5. Coffee and tea (49%)



6. Clothing and footwear (44%)



***Showing % of "I purchase products in this category that are sustainable" from Q13.**

Product category sustainability

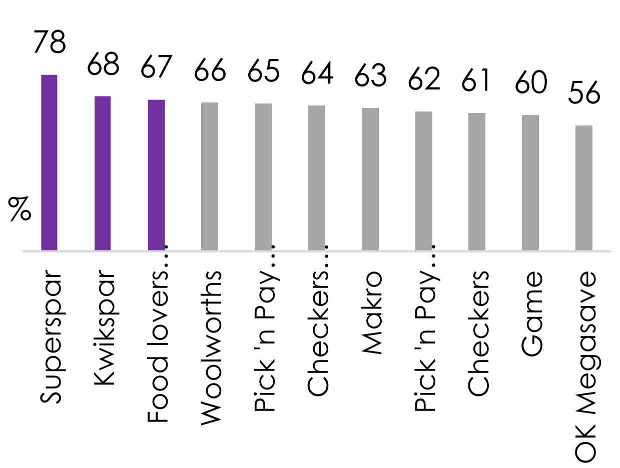
Potential Users: Retailers bought from per category

BTC TRADE FOR DEVELOPMENT

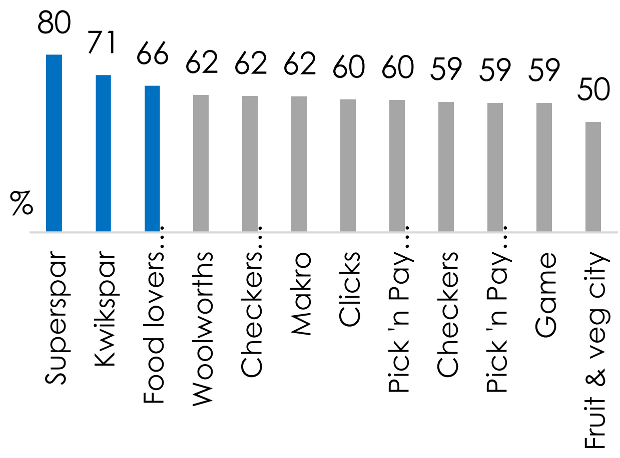
Base: n=1045

Ordered by most sustainable product category; Retailers ordered by % of sustainable products bought from. Only included those retailers where "I purchase products in this category that are sustainable" > 50% Only showed top 14 sustainable retailers where necessary.

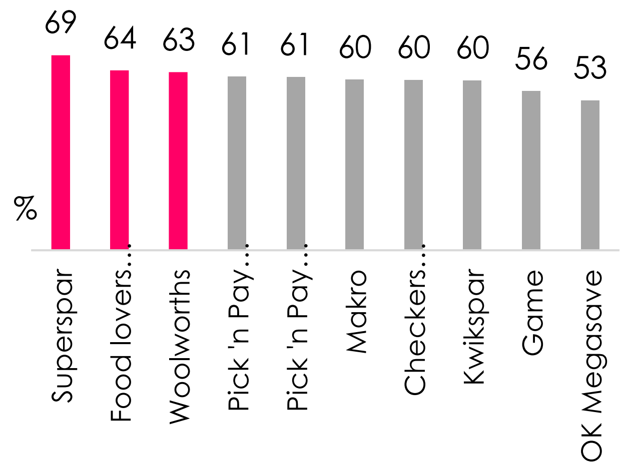
1. Fresh Produce (56%)



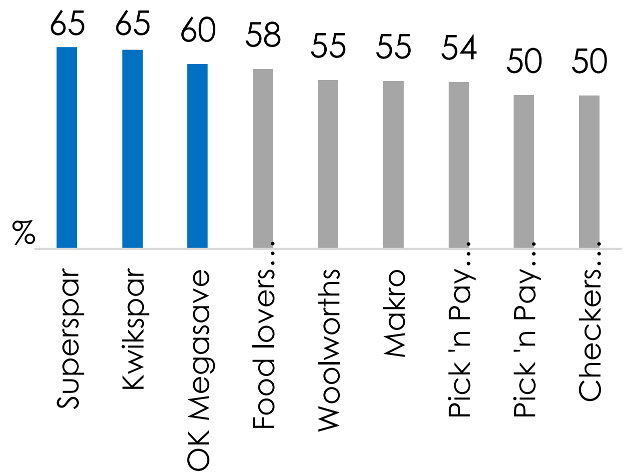
2. Dairy products (56%)



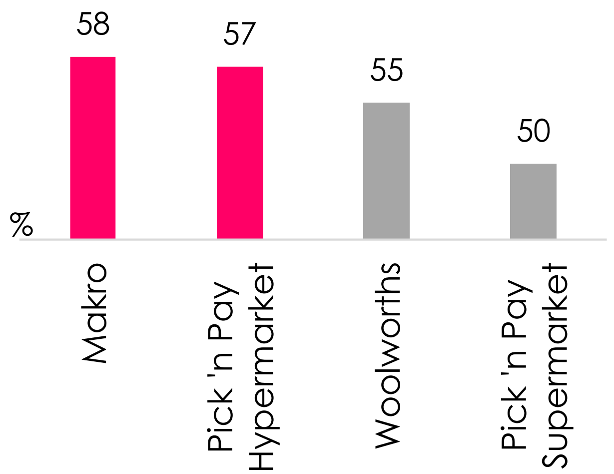
3. Meat and poultry (54%)



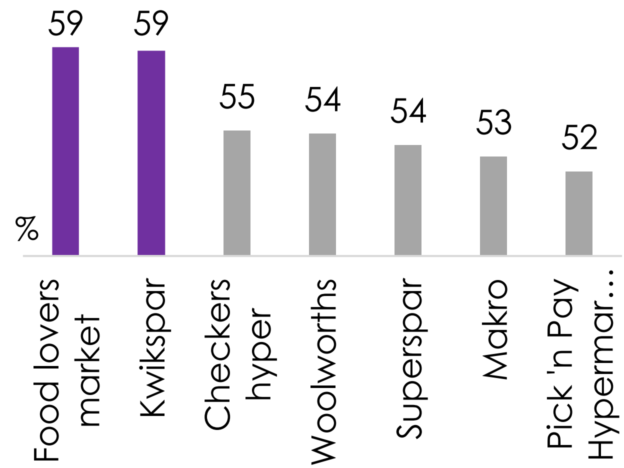
4. Packaged grocery products (47%)



5. Clothing and footwear (45%)



6. Coffee and tea (45%)



***Showing top 6 % of "I purchase products in this category that are sustainable" from Q13.**

Product category sustainability

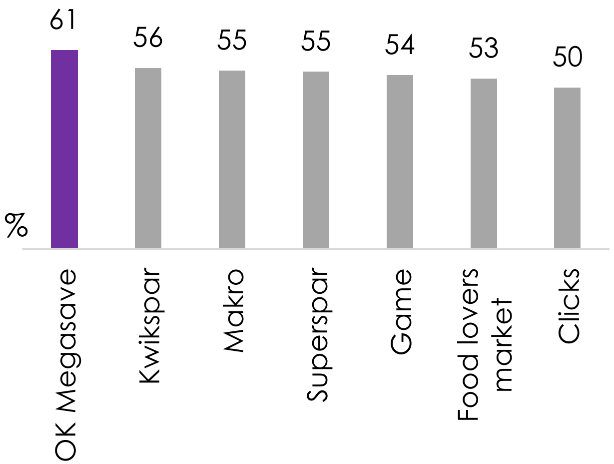
Rejecters: Retailers bought from per category

BTC TRADE FOR DEVELOPMENT

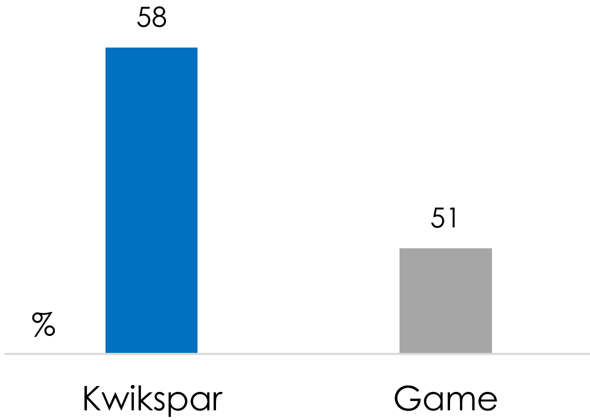
Base: n=677

Ordered by most sustainable product category; Retailers ordered by % of sustainable products bought from. Only included those retailers where "I purchase products in this category that are sustainable" > 50% Only showed top 14 sustainable retailers where necessary.

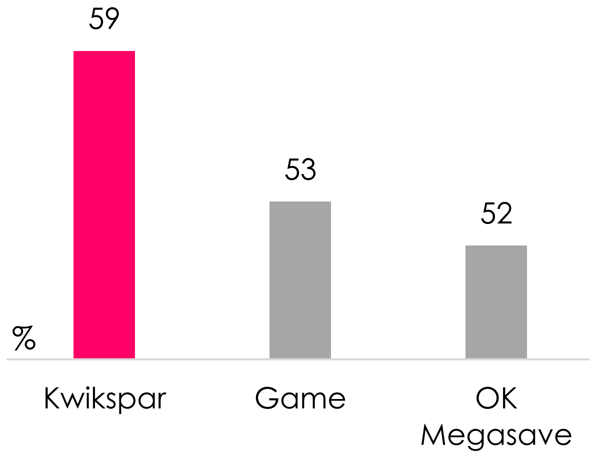
1. Dairy products (45%)



2. Fresh Produce (44%)



3. Meat and poultry (43%)



***Showing % of "I purchase products in this category that are sustainable" from Q13.**

Empirical Results South African Consumers' Shopping Habits

South African Consumers' Shopping Habits
Summary

Predominately purchased: Once a Month

Mainly purchased by: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

Tea (Excl. Rooibos)

2013	2017*
Quality	**Price**
Price	**Quality**
Brand	Taste
Taste	Brand

Top 5 retailers where product type was purchased: OK mini market, OK foods, Kwikspar, Superspar, Food lovers market

Predominately purchased: Once a Month

Mainly purchased by: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

Rooibos

2013	2017*
Quality	**Price**
Price	**Quality**
Brand	Taste
Taste	Brand

Top 5 retailers where product type was purchased: Makro, Woolworths, Food lovers market, Superspar, Game

Mainly purchased by: Person who frequently buys food, grocery and personal care items for the household, or often actively participate in deciding what should be bought (*not the person who most often does the household shopping*)

Coffee

Predominately purchased: Once a Month

2013	2017*
Quality	**Quality**
Price	**Price**
Brand	Taste
Taste	Brand

Top 5 retailers where product type was purchased: Hypersave, OK foods, Food lovers market, OK Megasave, Makro

***Showing top 4 of most mentioned from Q39.**

Mainly purchased by: Person who frequently buys food, grocery and personal care items for the household, or often actively participate in deciding what should be bought (*not the person who most often does the household shopping*)

Wine

Predominately purchased:
Once a Month
Once a Week

2013	2017*
Quality	**Price**
Price	**Quality**
Brand	Brand
Taste	Taste

Top 5 retailers where product type was purchased: Makro, Food lovers market, Pick 'n Pay Hypermarket, Checkers, Kwikspar

South African Consumers' Shopping Habits
Summary

BTC TRADE FOR DEVELOPMENT

Chocolate

Mainly purchased by: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

Predominately purchased: Once a Month and Once a Week

Food lovers market, Kwikspar, OK Megasave, Woolworths, Makro

2013	2017*
Quality	**Taste**
Price	**Price**
Brand	Quality
Taste	Brand

Sugar

Mainly purchased by: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

OK Megasave, Jumbo Cash & Carry, OK foods, Cambridge food, Game

Predominately purchased: Once a Month

2013	2017*
Quality	**Price**
Price	**Quality**
Brand	Brand
Taste	Taste

Meat

Predominately purchased: Once a Month

2017*
Quality
Price
Taste
Brand

OK foods, Meat World, OK Megasave, Pick 'n Pay Hypermarket, Checkers hyper

Mainly purchased by: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

Clothing

Predominately purchased: Once a Month and Every 2-3 Months

Woolworths, Pick 'n Pay Supermarket, Game, Pick 'n Pay Hypermarket, Makro

Mainly purchased by: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

2017*
Quality
Price
Brand
Value-for-money

Make-up

Predominately purchased: Once a Month and Every 2-3 Months

2017*
Quality
Brand
Price
Trust in the brand

Mainly purchased by: Person who is mostly responsible for most of the food, grocery and personal care shopping for the household

Dischem, Clicks, Woolworths, Makro, Pick 'n Pay Hypermarket

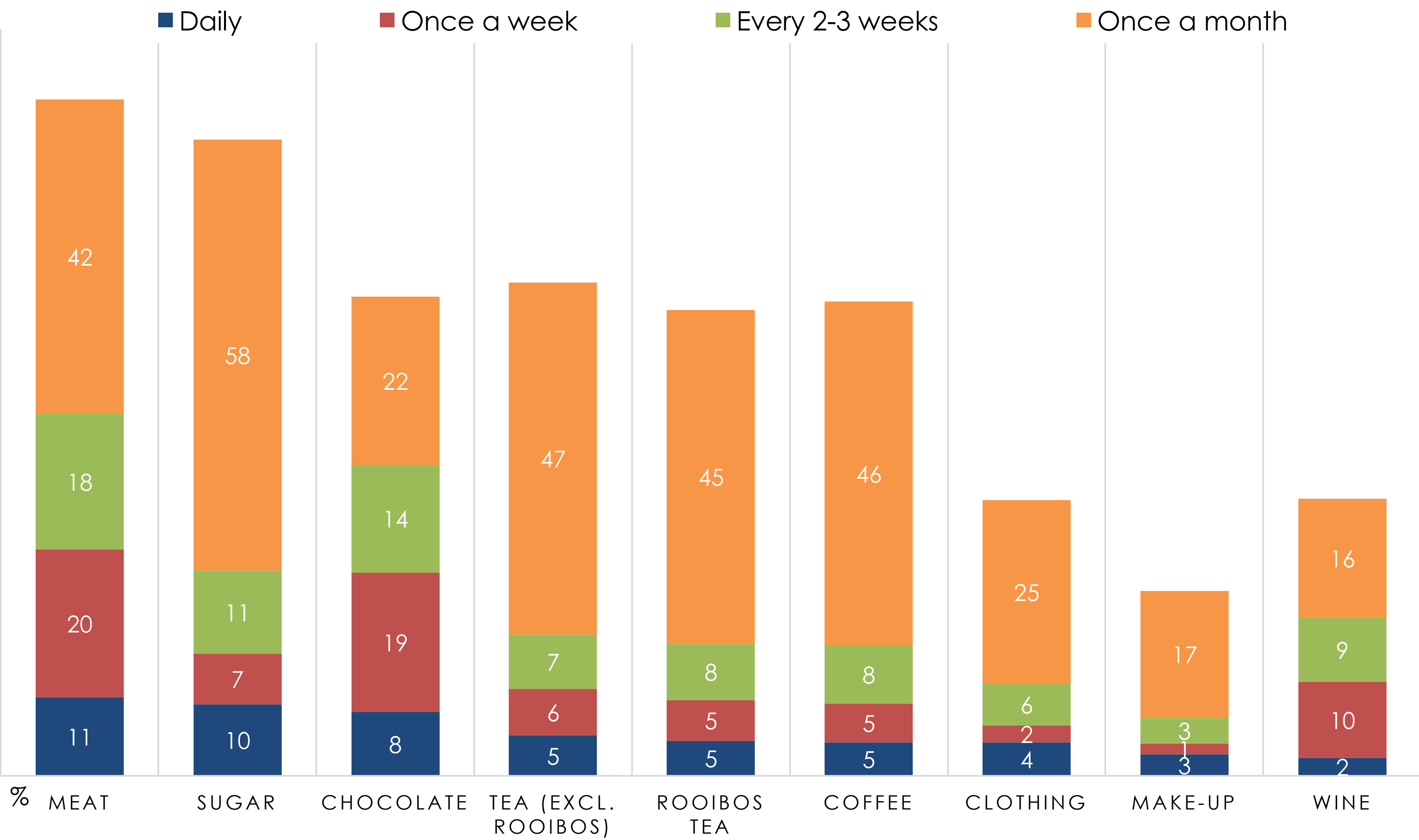
***Showing top 4 of most mentioned from Q39.**

Shopping habits

Base: n=1773

Q38. I am going to read out a list of types of products or service. For each please tell me how frequently, if at all, you purchase each type of product or service for yourself or your family

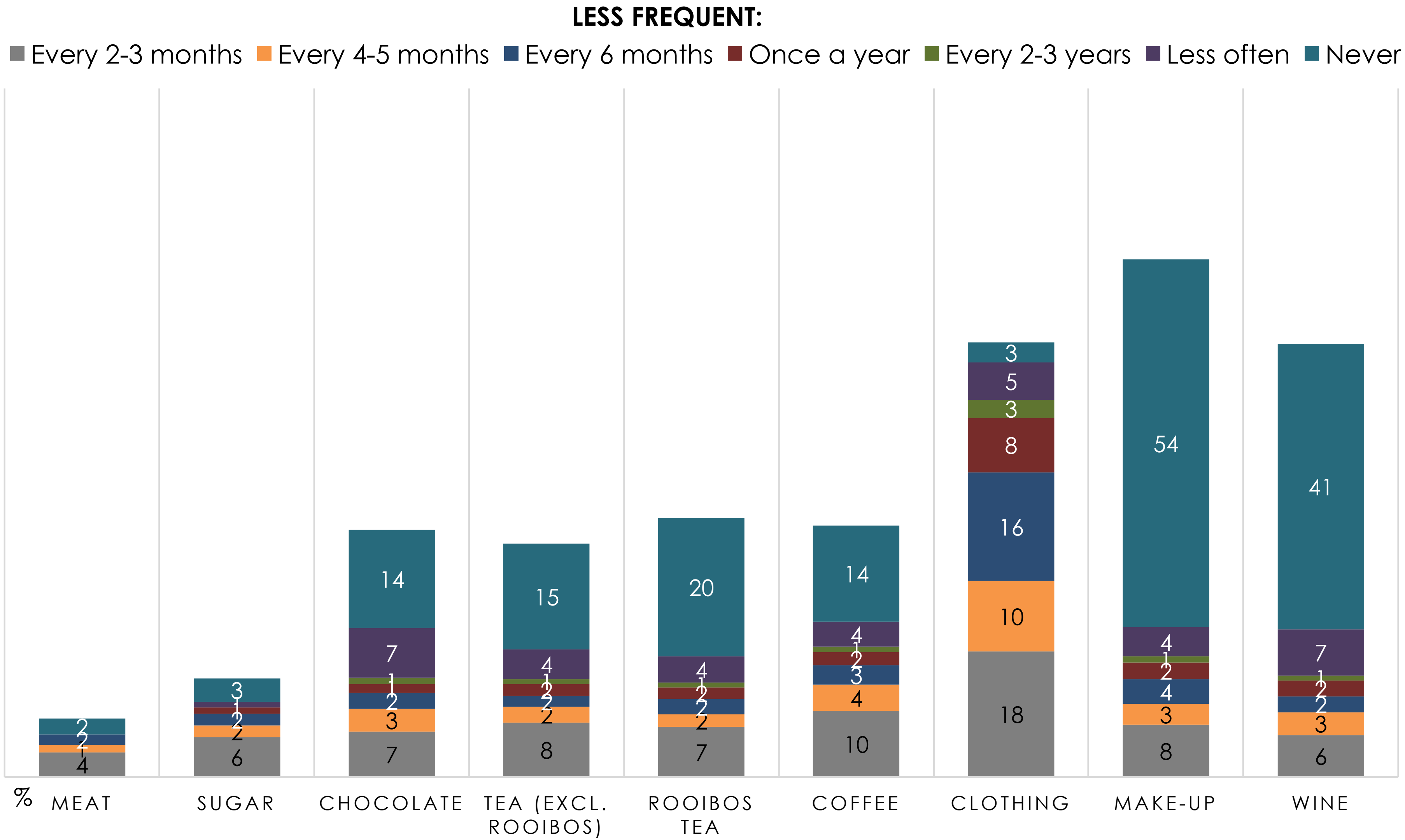
MOST FREQUENT:



Shopping habits

Base: n=1773

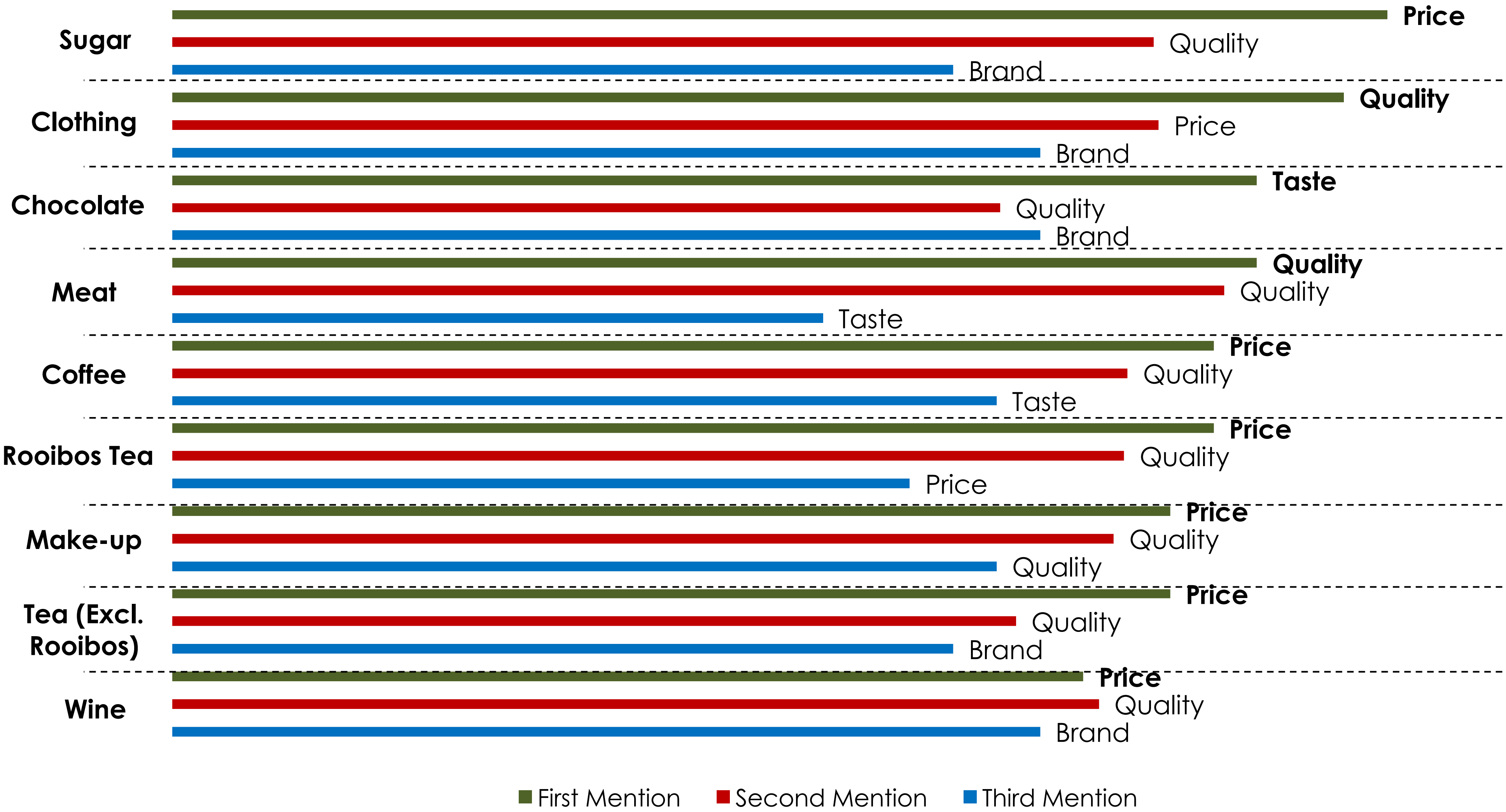
Q38. I am going to read out a list of types of products or service. For each please tell me how frequently, if at all, you purchase each type of product or service for yourself or your family



Shopping habits

Base: n=1773

Q39. How important are each of these elements to you when deciding on a brand or provider of PRODUCT CATEGORY? Please rank each element by its importance in your decision.



*Showing most mentioned for each mention, therefore a variable can come up twice per product

Empirical Results
Appropriate communication channels

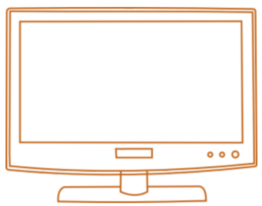
Appropriate channel communication

Summary

CHANNEL FOR INFORMATION

Overall, consumers **mostly get their information** about sustainability and sustainably certified products **from the TV**. The **current users** segment is more likely than the other segments to get their information **online**, from **social media**, and **in-store**. **Potential users** are more likely than the other segments to get their information from **newspapers/ magazines**; while **Rejecters mostly report to never get any information.**

Overall



Current Users

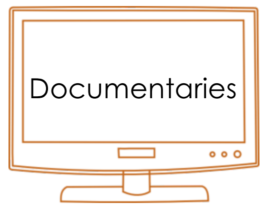
Potential Users

Rejecters

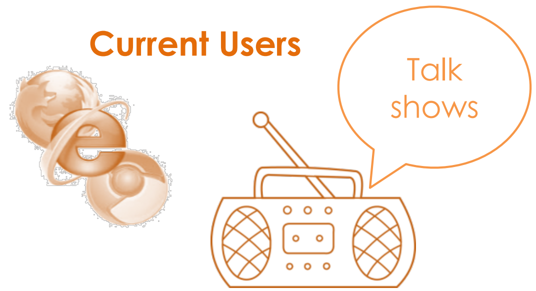
BEST WAY TO COMMUNICATE

Overall, consumers identified **information television, such as documentaries** as the **best way to communicate** issues surrounding sustainability. The **current users** segment are more likely than the other segments to feel **social media** or **radio talk shows** are the best way to communicate, **potential users** prefer **in-store advertising** and **rejecters** feel it is **not necessary to receive more information.**

Overall



Current Users



Potential Users

Rejecters

Appropriate channel communication

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q14. Where do you tend to get most of your information about sustainability and sustainably certified products?

Ordered by overall most mentioned

Most effective channel per segment	Overall	Current User	Potential User	Rejector
Television	48.9%	47.0%	52.1%	44.3%
Newspaper/Magazines	9.8%	4.6%	10.6%	9.0%
Radio	8.0%	5.5%	7.5%	8.8%
Online (websites, forums)	6.1%	14.1%	5.7%	6.0%
Social media (Facebook, Twitter, Instagram etc.)	5.4%	7.8%	4.9%	5.9%
On product packaging, itself (labelling)	5.0%	5.5%	5.1%	4.9%
In-store	4.2%	12.7%	3.9%	4.1%
From friends and family (word of mouth)	2.1%	2,8%	1.6%	2.7%
Billboards and outdoor	1.5%	0.0%	1.1%	2.1%
I never get any information	9.1%	0.0%	7.5%	12.0%

Appropriate channel communication

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q40. Considering all the information you received during this survey, what would the best way be to communicate issues surrounding sustainability to consumers like yourself?

Ordered by overall most mentioned

Most effective channel per segment	Overall	Current User	Potential User	Rejector
Information television (such as documentaries)	32.1%	29.7%	32.8%	31.2%
IN-Store advertising and information	19.9%	14.2%	20.3%	19.8%
Social media	19.0%	25.7%	18.7%	18.8%
Radio talk shows and information programmes	17.5%	20.0%	17.2%	17.8%
Suggestions and information by the store assistant / owner	8.2%	6.5%	8.3%	8.2%
It is not necessary to get more information	2.7%	1.4%	2.0%	3.9%

BTC TRADE FOR DEVELOPMENT

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Empirical Results
Fairtrade Tourism

Fairtrade Tourism

Summary

HOLIDAY PLANNING

When planning a holiday, **more than half of the consumers report looking for value for money** as the biggest factor. **Two in ten** consumers look into **whether or not it is sustainable**, and **one in ten** select it according to **whether or not it supports local communities.**

There is an **increase** in the proportion of consumers who consider whether their **destination, place of stay and way of travel** engages in **fair and responsible tourism** and **benefits the local communities and economies**.

PERCEPTIONS OF FAIRTRADE TOURISM

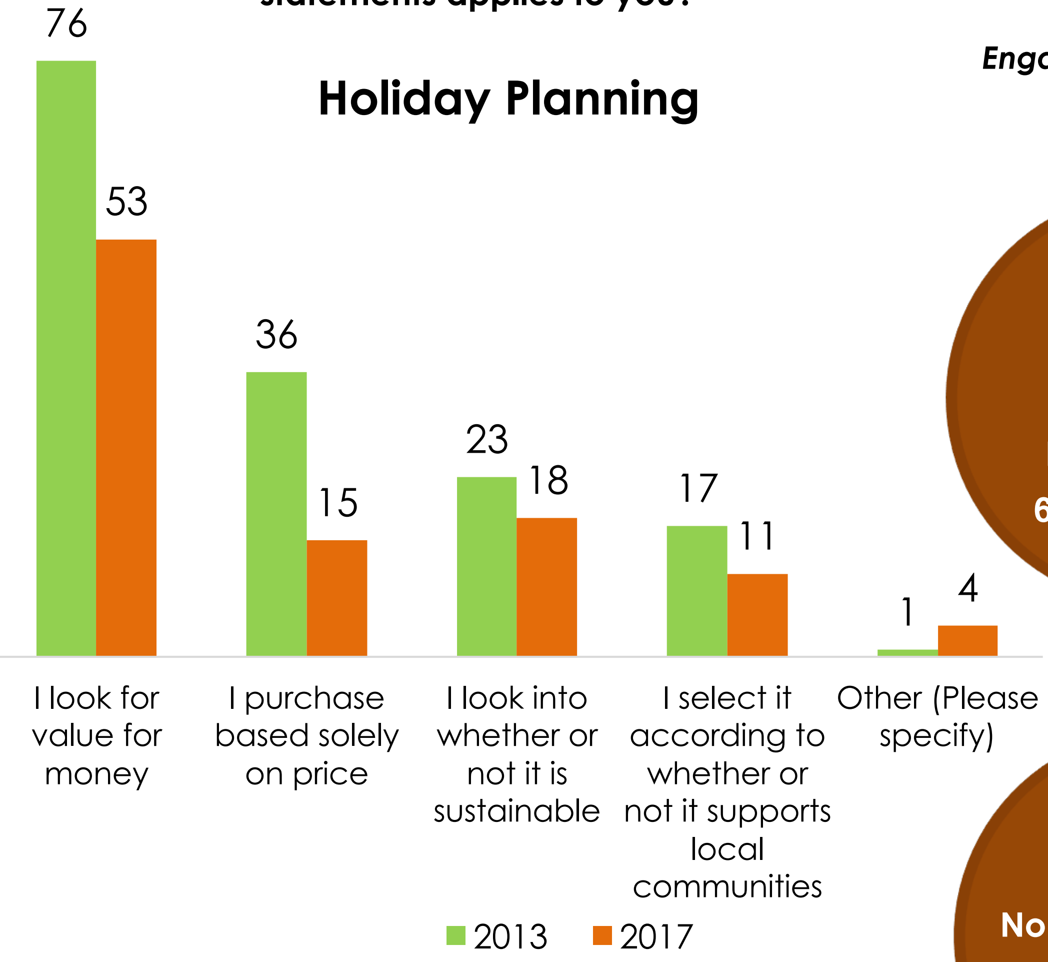
Seven in ten people agree that Fairtrade Tourism would **benefit the environment, the economy, local communities, as well as the employees.** They also feel it will **be a fun holiday experience**. Among the consumer segments – fewer rejecters agree with these sentiments than current and potential users.

Fairtrade Tourism

BTC TRADE FOR DEVELOPMENT

Q35 Base: n=1773

Q34. When planning your holiday, which of these statements applies to you?

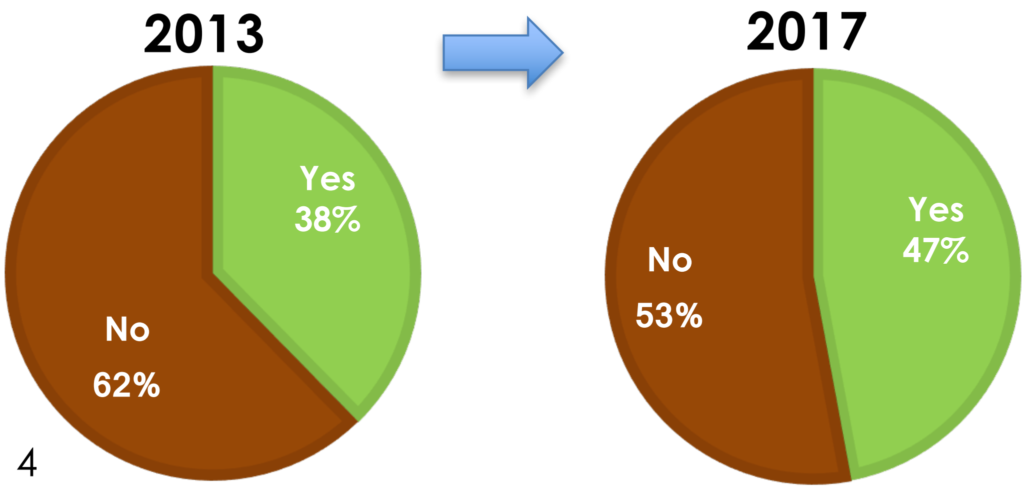


Q34 Base: Those who have gone on holiday in the past year: n = 438 *(n = 290)*

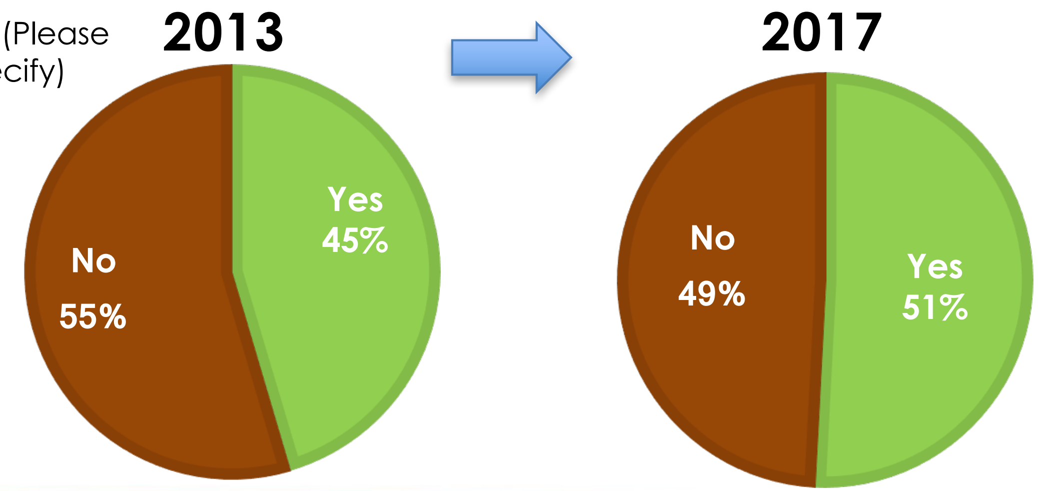
Changed from a multiple mention question in 2013 to a single mention in 2017

Q35. When selecting a holiday, do you look into whether or not your destination, place of stay and way of traveling?

Engages in fair and responsible tourism which includes fair working conditions and fair wages for their employees?



Benefits local communities and economies?



Fairtrade Tourism

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q36. I am going to read out a list of statements about Fairtrade tourism in South Africa. For each statement I read out please tell me on a scale from 1 to 5, one being strongly disagree and 5 is strongly agree, the extent in which you agree or disagree.

Ordered by overall top 2 scores

Statement	Overall	Current Users	Potential Users	Rejecters
Will be a fun holiday experience for me and my family	74.6%	87.1%	80.6%	64.9%
Will benefit the environment	74.4%	83.8%	80.8%	64.5%
Is worth more for the economy and country as a whole	73.5%	74.1%	80.6%	63.3%
Will benefit the local communities	73.3%	84.5%	78.9%	64.4%
Deciding to choose a Fairtrade holiday destination will benefit the employees	70.0%	76.4%	76.0%	60.7%

Showing top 2 scores (4 = Agree and 5 = Strongly Agree)

BTC TRADE FOR DEVELOPMENT

ASK AFRIKA™
DARE TO KNOW

Empirical Results
Small Scale Farming

BTC TRADE FOR DEVELOPMENT

Summary

SUPPORTING SMALL SCALE FARMERS

Overall, the **majority of consumers** reported to be willing to **pay R5 more for a bottle of wine** if they knew the money would be used by the farm workers **to uplift their community** or **R5 extra for a bag of coffee beans** if they knew they were **supporting small scale farmers in Africa.**

More than half of the consumers were unsure of which products they would **expect to see produced by small-scale farmers**, however, when they do have an idea; **Fruit and Vegetables** are the most mentioned products expected to be produced by small-scale farmers.

PERCEPTIONS OF SMALL SCALE FARMING

Eight in ten consumers feel that **government, manufacturers** and **retailers should support small scale farmers**. It is positive to note that **six in ten** consumers **prefer to buy produce originating from small-scale farmers** as much as they can, and feel that **products from small-scale farmers are the same quality** as products from large commercial farms.

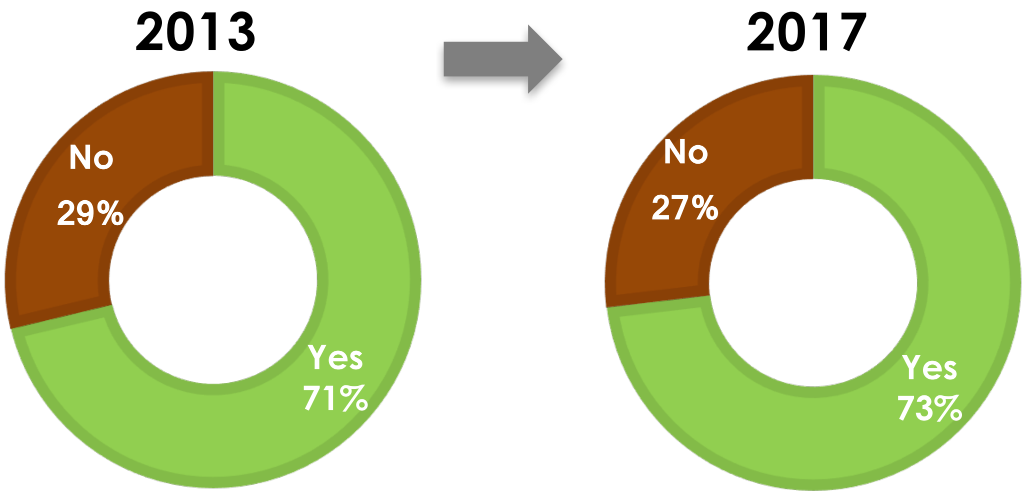
Small Scale Farming

BTC TRADE FOR DEVELOPMENT

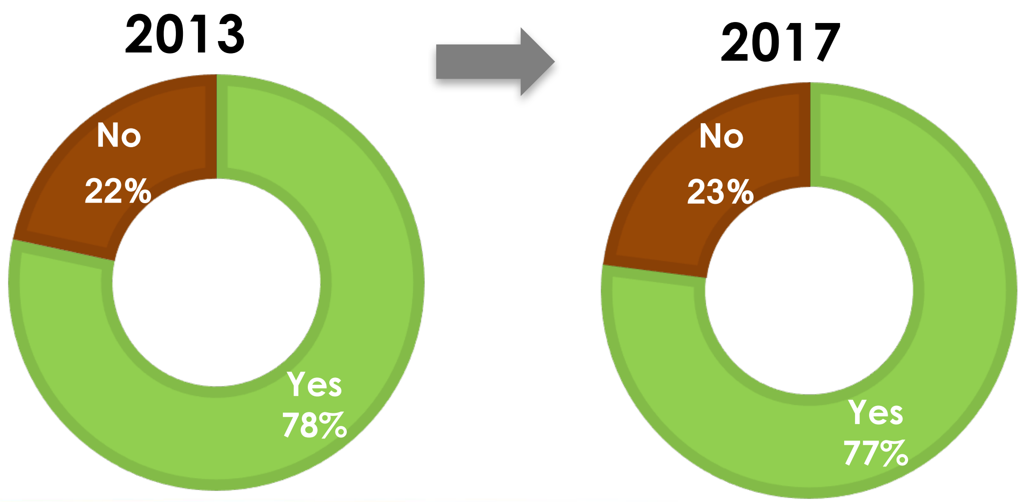
Base: n=1773

Q37a. Which kinds of products, if any, would you expect to see produced by small-scale farming communities (open-ended question)	% Mention
Don't know	59.6
Vegetables	**7.5**
Fruit	**5.8**
Maize	3.5
Dairy	2.4
Meat	2.0
Spinach	**1.2**
Cabbage	**1.2**
Chicken meat	1.1
Tomatoes	**1.0**
Beans	0.9
Coffee	0.8
Local products	0.8
Poultry	0.7
Potatoes	**0.7**
Eggs	0.5
Fresh produce	0.5
Wine	0.5

Q30. Willing to pay an additional R5 for a bottle of South African wine if known that working and living conditions on the farm are good and that this money is used by the farm workers to uplift their community



Q31. Willing to spend an additional R5 on a bag of coffee beans if known that you were supporting small-scale farmers in Africa



Small Scale Farming

BTC TRADE FOR DEVELOPMENT

Base: n=1773

Q37b. For each statement I read out please tell me on a scale from 1 to 5, 1 meaning strongly disagree and 5 meaning strongly agree, the extent in which you agree or disagree with each statement. There are no right or wrong answers – we just want to know what you think.

Ordered by overall top 2 scores

Statement	Overall	Current Users	Potential Users	Rejecters
Government should do more to support small-scale farmers	81.7%	89.1%	86.3%	74.5%
It is important for manufacturers and retailers to support small-scale farmers	78.7%	90.3%	82.9%	71.9%
Small-scale farmers are treated unfairly by larger businesses and retailers	63.5%	67.8%	67.5%	57.5%
Small scale farming are more beneficial to farmworkers than large scale farming enterprises	61.3%	65.4%	65.2%	55.5%
I prefer to buy produce originating from small-scale farmers as much as I can	60.7%	61.6%	66.0%	53.1%
Products from small-scale farmers are the same quality as products from large commercial farms	58.1%	57.0%	60.3%	55.0%
I don't know where to buy products produced by small-scale farmers	49.8%	66.2%	50.4%	47.7%
Small-scale farming is out-dated and should be replaced by large commercial farms.	37.9%	35.5%	39.5%	35.9%

Showing top 2 scores % (4 = Agree and 5 = Strongly Agree)

Empirical Results
Key Takeouts

Key Takeouts

According to TGI: Majority of South Africans are aware of environmental issues and **will buy into green initiatives**, but **only if they offer functional benefits too**.
This may point to consumers experiencing budget constraints and placing value on a multitude of product attributes, in order to maximize their budget.

The segment of consumers who are **most likely to buy Fairtrade products** (categorised as Users) are **Females**, **50+ years old**, **Coloured**, Living in the **Western Cape**. While the most **passionate green consumers** are **higher LSM (8-10)**, living in Cape Town, Mangaung or Tshwane, and from the White or Coloured population.

Mirroring this – it was found in the survey that **awareness of terms and logos related to ethical or sustainable concepts** are generally **higher** among the **White population**, **Females**, and people with a **higher income**.

Specific logos that were **identified more by Males** than Females include **Fairtrade Tourism, MSC, FSC, WWF** and **WIETA**.

The **Indian population** is **more likely to recognise** the term '**honest business practice**' and the logos for **USDA Organic** and **SASSI**.

The **MSC** and **FSC** logos are **more likely to be recognised** by the **Coloured** population.

Awareness of the Fairtrade logo is **more likely to be recognised** by the **Black** population and overall awareness of the logo is significantly lower than the recognition of the term.

Key Takeouts

There is an increase of people who recognise the Fairtrade logo from 2013 (6.5%) to 2017 (7.1%) as well as the term (from 7% to 15%). There is, however, a **noticeable decline** since 2013, in the proportion of people **who feel the Fairtrade logo** and **Fairtrade products** are **trustworthy** (85% to 51%), and different from products or brands that aren't certified (79% to 60%). The **perception of the quality of Fairtrade certified products has also declined**.

Just over half reported to be **more likely to purchase a product if they see the Fairtrade logo** – a **decline since 2013** (68% to 55%). Together with this, there is a noticeable **decline in the proportion of people who consciously look for products carrying the Fairtrade logo** (64% to 42%).
Although cost and value for money will always be a top consideration among consumers, seemingly, **price is not the major influencing factor for this decline** since there is an **increase** in the proportion of people who report to be **willing to purchase Fairtrade products regardless of the cost** (22% to 24%)or even if it is the most expensive brand.

This gives a good indication that suppliers and retailers should make the brand more visible in the shopping environment in order to make it top-of-mind for consumers. Together with this initiative, the logos should also be positioned in such a way to **resonate more with the consumer**. This entails exposing the consumer to **how Fairtrade (or any ethical label) has a positive outcome on their immediate environment**, because then it will become **more relevant to the consumer** within their daily lives.

This can be seen for the Proudly SA label, as its logo recognition has increased since 2013 and consumers are more likely to purchase a product that showcases this label, across the various demographic segments. This logo therefore **resonates with all South Africans**, as they feel closer to it.

Key Takeouts

BTC TRADE FOR DEVELOPMENT

Attitudes which discriminate a current user of Fairtrade certified products are identified as being their **familiarity** with Fairtrade Tourism as well as being **willing to go out of their way** to find sustainable products/ sustainably produced products in store.

There is a need to **improve awareness** of the term and logo (specifically the logo). The identified mediums to do this through is **TV documentaries** or in **store advertising**.

Overall, consumers acknowledge and agree with the values of sustainability to be upheld by themselves as well as business.

Even the **rejector segment rate these relatively highly** (except for statements regarding small-scale farming). They **know why** you must support sustainable practices, they **understand the value** of supporting it, and **acknowledge everyone's responsibility** to support sustainability – but still choose not to buy Fairtrade.

The **awareness of the logos**, of the **terms**, and **information** regarding sustainability in general is **low**; and the rejector segment reportedly **do not get information** and also **do not feel they need** more information regarding sustainability.

Where to go from here?

Increase trust for labels

It is widely known that "the mislabelling of various products is common in South Africa and not only violates food regulations but also poses a number of economic, ethical as well as health challenge" Dr. Rob Davies (Minister of Trade and Industry). With this being common practice in South Africa and becoming more widely known, this might have **lead to consumer trust in labels declining** and therefore consumers pay less attention and are less aware of certain labels. For consumers to become more aware and perceptive of labels, it is crucial for them to firstly read them. Consumers will be more inclined to read them and find out more about them **if their accurate information is widely and easily attainable and understandable.**

Cadbury which was well known for carrying the Fairtrade logo, pulled out of Fairtrade chocolate in 2016, which yielded some criticism for Cadbury and Fairtrade alike. This might have led to confusion amongst consumers, as to which labels represents the 'best' ethical standards and therefore which to trust.

Where to go from here?

Increase resonance of labels with consumers – bring it closer to home

Marketing campaigns should emphasise **how Fairtrade and other ethical labels are making a difference in peoples lives** and show this to consumers to make it more relevant to them in order for it to resonate with them.

Videos and radio talk shows are an effective medium to use and for people to share their stories.

People do not tend to read more than necessary when looking at labels, therefore something like a quote as to 'how Fairtrade has changed my life' could be more beneficial, than four or more sentences explaining what the label means.

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Smart Data for Smarter Decisions™

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