



**CENSUSWIDE**

THE SURVEY CONSULTANTS

**CW8218 EXECUTIVE**

**SUMMARY**

**SOIL ASSOCIATION**

**13.07.2021 - 16.07.2021**

## CW8218 EXECUTIVE SUMMARY

PREPARED FOR: SOIL ASSOCIATION

Censuswide surveyed 1,000 respondents who are open to purchasing organic food and shop at supermarkets excluding 'deep greens' between 13.07.2021 - 16.07.2021.

### QUESTION 1

**When shopping for organic fruit, vegetables and salad, how much of an influence are the following factors when it comes to buying, if at all?**

- The factors that greatly influence respondents when buying organic fruit, vegetables and salad are:
  1. Freshness (54%)
  2. Price (46%)
  3. British sourcing (30%)
  4. The health benefits of organic fruit and veg (24%)
  5. The environmental benefits of organic fruit and veg (21%)
  6. Packaging (16%) and
  7. The brand name (9%)
- Over 3 in 5 (62%) respondents aged 25-34 said the packaging has an influence\* when it comes to buying organic fruit, vegetables and salad, compared to less than half (49%) of respondents aged 55+ who said the same
- Respondents in the South West were the most likely (59%) to say the packaging has an influence\* when it comes to buying organic fruit, vegetables and salad, while respondents in the North East were the least likely to say this (44%)
- Almost two thirds (65%) of respondents who regularly buy organic fruit, vegetables and salad said packaging has an influence\* when it comes to buying, compared to 52% of respondents who occasionally buy organic fruit, vegetables and salad and 36% who are open to I am open to buying but don't currently buy organic fruit, vegetables and salad

\*Combines 'a great influence' and 'somewhat of an influence'

### QUESTION 2

**What, if anything, should organic fruit, vegetable and salad packaging mainly achieve? (Tick up to three)**

- The top three things that respondents think organic fruit, vegetable and salad packaging should mainly achieve are:
  1. Keep the food fresh (63%)
  2. Have a low or no environmental impact (55%)
  3. Increase food safety (e.g., reduce transmission of viruses/disease) (33%)
- A quarter (25%) of respondents think organic fruit, vegetable and salad packaging should mainly look appealing, while just over 1 in 7 (15%) think it should mainly make products easier to handle. 1 in 7 (14%) think organic fruit, vegetable and salad packaging should mainly give instructions/ideas on how to use the product
- More female respondents think organic fruit, vegetable and salad packaging should mainly have a low or no environmental impact than male respondents (57% versus 52% respectively)
- Over 3 in 5 (63%) respondents aged 55+ said organic fruit, vegetable and salad packaging should mainly have a low or no environmental impact, compared to less than half (47%) respondents aged 35-44
- Almost 3 in 10 (29%) respondents aged 45-54 think organic fruit, vegetable and salad packaging should mainly look appealing, compared to a fifth (20%) of respondents aged 55+
- Two thirds (66%) respondents who live in the East Midlands said organic fruit, vegetable and salad packaging should mainly have a low or no environmental impact, compared to 42% respondents who live in the West Midlands
- Respondents who occasionally buy organic fruit, vegetable and salad were the most likely to say organic fruit, vegetable and salad packaging should mainly have a low or no environmental impact (58%), followed by those who are open to, but haven't bought organic fruit, vegetable and salad (52%) and finally those who regularly buy organic fruit, vegetable and salad packaging (50%)



### QUESTION 3

#### How concerned or unconcerned are you about packaging when purchasing organic fruit, vegetables and salad?

- Over half (56%) of respondents are concerned\* about packaging when purchasing organic fruit, vegetables and salad
- 3 in 5 (60%) female respondents are concerned\* about packaging when purchasing organic fruit, vegetables and salad, compared to 52% of male respondents
- Over 3 in 5 (62%) respondents aged 35-44 are concerned\* about packaging when purchasing organic fruit, vegetables and salad, compared to 51% of 45-54 year old respondents
- Over two thirds (68%) of respondents in Scotland are concerned\* about packaging when purchasing organic fruit, vegetables and salad, compared to less than half (49%) of respondents in the North West
- Over two thirds (68%) respondents who regularly buy organic fruit, vegetables and salad are concerned\* about packaging when purchasing organic fruit, vegetables and salad, compared to 55% who occasionally buy organic fruit, vegetables and salad and 41% of those who have never but would be open to buying organic fruit, vegetables and salad

\*Combines 'very concerned' and 'somewhat concerned'

### QUESTION 4

#### What, if any, are your key concerns associated with packaging on organic fruit, vegetables and salad? (tick up to three)

- The three key concerns associated with packaging on organic fruit, vegetables and salad are:
  1. Packaging that can't be recycled (48%)
  2. Excess packaging (43%)
  3. Plastic packaging (37%)
- Over a third (37%) of respondents said a key concern for them in regard to packaging on organic fruit, vegetables and salad is packaging that can't be composted or doesn't biodegrade
- Over a quarter (27%) of respondents said a key concern for them in regard to packaging on organic fruit, vegetables and salad is how safe it keeps food
- More female than male respondents said a key concern for them in regard to packaging on organic fruit, vegetables and salad is packaging that can't be composted or doesn't biodegrade (40% versus 33%)
- Almost 3 in 5 (58%) respondents aged 55+ said a key concern for them in regard to packaging on organic fruit, vegetables and salad is packaging that can't be recycled, compared to less than a third (32%) of respondents aged 16-24
- Over 3 in 5 (62%) respondents in the East Midlands said a key concern for them in regard to packaging on organic fruit, vegetables and salad is packaging that can't be recycled, compared to less than 3 in 10 (29%) of respondents in Greater London
- The top concern associated with packaging on organic fruit, vegetables and salad for those that regularly buy them is excess packaging (43%) while for those that occasionally buy (53%) or are open to but don't buy (46%) the top concern is packaging that can't be recycled

### QUESTION 5

#### How informed, if at all, do you feel you are in regard to the impact on the environment for the following types of packaging?

- 68% respondents feel completely or somewhat informed about the impact on the environment for loose packaging, compared to 32% who feel not very or not at all informed





- 70% respondents feel completely or somewhat informed about the impact on the environment for non-recyclable plastic packaging, compared to 30% who feel not very or not at all informed
- 78% respondents feel completely or somewhat informed about the impact on the environment for recyclable plastic packaging, compared to 22% who feel not very or not at all informed
- 72% respondents feel completely or somewhat informed about the impact on the environment for compostable or biodegradable material packaging, compared to 28% who feel not very or not at all informed
- 80% respondents feel completely or somewhat informed about the impact on the environment cardboard or paper-based packaging, compared to 20% who feel not very or not at all informed
- Over a quarter (28%) of respondents aged 55+ admit they are not very informed about the impact non-recyclable plastic has on the environment, compared to just over 1 in 7 (15%) respondents aged 16-24
- Respondents in the West Midlands were the most likely to state they are 'not very' or 'not at all' informed about the impact recyclable plastic has on the environment, compared to respondents in Scotland who were the least likely (29% versus 15%)
- Just over 3 in 10 (31%) respondents who regularly buy organic fruit, vegetables or salad said they are completely informed about the impact compostable or biodegradable material packaging has on the environment, compared to less than 1 in 7 (13%) of respondents who are open to, but don't buy, organic fruit, vegetables or salad

## QUESTION 6

**When buying, or considering buying, organic fruit, vegetables and salad, what is your preferred packaging for the product to be in, if anything? (Tick one)**

- The top three types of packaging that respondents prefer for organic fruit, vegetables and salad are:
  1. Loose (27%)
  2. Cardboard or paper-based packaging (22%)
  3. Compostable or biodegradable materials (16%)
- In comparison, just over 1 in 7 (15%) prefer recyclable plastic, 1 in 11 (9%) prefer whatever material keeps the product freshest and just 1% prefer non-recyclable plastic
- Respondents aged 16-24 (20%) and 25-34 (22%) mainly prefer organic fruit, vegetables and salad to be in recyclable plastic while respondents aged 35-44 (29%) and 55+ (32%) mainly prefer loose packaging and respondents aged 45-54 (26%) mainly prefer cardboard or paper-based packaging
- 2 in 5 (40%) respondents based in Yorkshire and the Humber mainly prefer organic fruit, vegetables and salad to be in loose packaging, compared to just over a fifth (21%) of respondents in the East of England

## QUESTION 7

**What types of packaging, if any, would put you off purchasing organic fruit, veg and salad? (Tick all that apply)**

- Half (50%) of respondents said non-recyclable plastic packaging would put them off purchasing organic fruit, veg and salad
- Less than 1 in 7 (13%) respondents said loose (no packaging) would put them off purchasing organic fruit, veg and salad
- 1 in 8 (12%) respondents said cardboard or paper packaging would put them off purchasing organic fruit, veg and salad and the same percentage (12%) said recyclable plastic would put them off
- 1 in 12 (8%) respondents said compostable or bio-degradable materials packaging would put them off purchasing organic fruit, veg and salad
- Over 3 in 5 (63%) respondents aged 55+ said non-recyclable plastic packaging would put them off purchasing organic fruit, veg and salad, compared to a third (33%) of respondents aged 16-24 who said the same
- Almost 3 in 5 (58%) respondents who live in the East of England said non-recyclable plastic packaging would put them off purchasing organic fruit, veg and salad, compared to less than 2 in 5 (36%) of respondents who live in Greater London who said the same



- Almost a fifth (18%) of respondents who regularly buy organic fruit, veg and salad said recyclable plastic packaging would put them off purchasing organic fruit, veg and salad, compared to 1 in 14 (7%) respondents who are open to, but don't buy organic fruit, veg and salad, who said the same

## QUESTION 8

### Do you have higher, lower or the same expectations for organic fruit, veg and salad to be in environmentally friendly packaging than non-organic?

- Well over 2 in 5 (45%) respondents said they have higher expectations for organic fruit, veg and salad to be in environmentally friendly packaging than non-organic
- Over half (53%) respondents said they have the same expectations for organic fruit, veg and salad to be in environmentally friendly packaging than non-organic
- Just 1% of respondents said they have lower expectations for organic fruit, veg and salad to be in environmentally friendly packaging than non-organic
- Half (50%) of female respondents said they have higher expectations for organic fruit, veg and salad to be in environmentally friendly packaging than non-organic, compared to just over 2 in 5 (41%) male respondents
- Over half (55%) of respondents based in Scotland said they have higher expectations for organic fruit, veg and salad to be in environmentally friendly packaging than non-organic, compared to just over 2 in 5 (41%) respondents in the North West
- Almost half (48%) of respondents who regularly buy organic fruit, veg and salad said they have higher expectations for organic fruit, veg and salad to be in environmentally friendly packaging than non-organic, compared to 2 in 5 (40%) respondents who are open to, but don't buy, organic fruit, veg and salad, who said the same

## QUESTION 9

### With COVID-19 restrictions easing, how comfortable or uncomfortable would you be buying organic fruit, vegetables and salad in the following way?

- With COVID-19 restrictions easing, over 3 in 5 (64%) respondents said they feel comfortable\* buying organic fruit, vegetables and salad with no packaging, compared to 1 in 7 (14%) respondents who said they feel uncomfortable\*\* with this
- With COVID-19 restrictions easing, over 2 in 5 (41%) respondents said they feel comfortable\* buying organic fruit, vegetables and salad with plastic packaging, compared over a quarter (27%) of respondents who said they feel uncomfortable\*\* with this
- Almost three quarters (74%) of respondents said they feel comfortable\* buying organic fruit, vegetables and salad with cardboard packaging, compared to 1 in 20 (5%) respondents who said they feel uncomfortable\*\* with this
- Over three quarters (77%) of respondents said they feel comfortable\* buying organic fruit, vegetables and salad with biodegradable packaging, compared to 2% of respondents who said they feel uncomfortable\*\* with this
- Almost 4 in 5 (79%) respondents who regularly buy organic fruit, veg and salad said they feel comfortable\* buying organic fruit, vegetables and salad with biodegradable packaging, compared to 7 in 10 (70%) respondents who are open to, but don't buy, organic fruit, veg and salad, who said the same

\*Combines 'very comfortable' and 'somewhat comfortable'

\*\*Combines 'somewhat uncomfortable' and 'very uncomfortable'

## QUESTION 10

### What labelling, if any, would you like to see to help inform you on sustainable packaging when shopping? (Tick all that apply)

- Over half (53%) of respondents would like to see clearer labelling and guidance on recycling information (e.g., knowing exactly what the recycling symbols mean) to help inform them on sustainable packaging when shopping



- Almost half (47%) of respondents would like to see labelling that shows whether the type of packaging can actually be recycled in their area/council to help inform them on sustainable packaging when shopping
- 2 in 5 (40%) respondents would like to see clearer labelling on the packaging materials used to help inform them on sustainable packaging when shopping
- Just under a third (32%) of respondents would like to see clearer information on how types of packaging impacts on the environment to help inform them on sustainable packaging when shopping
- Just under a quarter (24%) of respondents would like labelling to show what the brand is doing to help be more sustainable to help inform them on sustainable packaging when shopping
- 1 in 8 (12%) respondents said there are no additional labelling that they would like to see regarding sustainable packaging
- Over half (53%) of female respondents would like to see labelling that shows whether the type of packaging can actually be recycled in their area/council to help inform them on sustainable packaging when shopping, compared to 2 in 5 (40%) male respondents who said the same
- Almost 3 in 5 (57%) respondents aged 55+ would like to see clearer labelling and guidance on recycling information (e.g., knowing exactly what the recycling symbols mean) to help inform them on sustainable packaging when shopping, compared to less than 2 in 5 (38%) respondents aged 35-44 who said the same
- Over half (54%) respondents based in the East Midlands would like to see labelling that shows whether the type of packaging can actually be recycled in their area/council to help inform them on sustainable packaging when shopping, compared to less than 2 in 5 (37%) respondents based in Greater London



# CENSUSWIDE

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CENSUSWIDE SPECIALISES IN ROBUST, HIGH QUALITY MARKET RESEARCH FOR THE GLOBAL COMMUNICATIONS INDUSTRY. OFFERING BOTH QUANTITATIVE AND QUALITATIVE METHODOLOGY OUR QUICK TURNAROUND SURVEYS DELIVER ACCURATE RESULTS IN LINE WITH OUR CLIENTS BRAND MESSAGE AND TRUSTED BY MEDIA.

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