



Incidence

360° Market Research Solutions

2020 barometer on fair trade Summary

Carried out by





Reminder of the methodology

We conducted an online survey of 1,212 people aged 16 to 80 living in Belgium. The data are strictly representative of the Belgian population. The sample was weighted based on gender, age and province so that the sample would be a perfect representation of the reference population.

The maximum margin of error for this sample is 2.8%. As a reminder: the maximum margin of error is the maximum difference between the observed frequency in the sample and the frequency that would be measured for the entire population. This margin of error is maximum for an observed frequency of 50%.

Key results

There is no clear association between **responsible consumption** and fair trade (the link is only there for 16% of Belgians). For Belgians, responsible consumption is clearly linked to ecology and to local consumption, where the preference is short supply chains. The Walloons link responsible consumption more to the purchase of local products; those living in Brussels to the purchase of organic products; and the Flemish to the purchase of durable products.

We see that price is the most important selection criterion for all product types investigated. In addition, when it comes to food and cosmetics, people pay particular attention to how healthy the product is. **As far as textiles are concerned, manufacturing with respect for human rights is the second most important selection criterion**, followed by the lifespan and quality of the product. For 23% of Belgians, respect for human rights is one of the key criteria when purchasing clothing or textiles; this trend is even more pronounced in the over-55s (29%). Nevertheless, there is a clear difference between this trend and the awareness of fair trade products, where it is mainly food products that are mentioned. Clothing is only in 8th place.



Shifts in selection criteria during the crisis, followed by good intentions.

The COVID-19 crisis has had an impact on the purchasing selection criteria for more than half of Belgians (52%); and especially when it comes to purchasing food products. The biggest shift is seen among the inhabitants of Brussels (21% say they have significantly changed their selection criteria).

During the health crisis, Belgians paid more attention to the price, how locally the product was produced, and how healthy the products they bought were. Overall, Belgians are more likely to keep these new selection criteria in the future (20% are very certain and 60% very likely to keep their new selection criteria). However, these results must be interpreted with caution, as the facts seem to paint a different picture. Since the lockdown was lifted, we see a significant drop in sales within the short supply chain.

Awareness about fair trade is good (86%).

This is better for Dutch-speakers than for French-speakers and increases with the level of education. Supermarkets and labels are the two main sources of fair trade awareness. However, without being prompted, Belgians can only recall two names: Oxfam and Fairtrade; moreover, both are increasingly familiar to the Flemish than to the Walloons.

Belgians have a good understanding of what fair trade is and the definition presented to them in the context of the survey is fairly consistent with the image people had of fair trade (82%). It is the most educated who have the best perception of the notion of fair trade.

On average, Belgians can name 5.6 different fair trade products. It is the youngest (6 different products) and the most educated (6.4) who can name the highest number of different products. Coffee, chocolate and bananas remain the three best-known fair trade products. It is mainly the older age group who equate fair trade with coffee (it is very clearly the best-known product).

Awareness of the Fair Trade Week has decreased significantly among all Belgians.



The general appeal of fair trade is good.

35% of Belgians have an excellent impression of it. It is the Belgians with a high level of education (41%), Walloons (39%), Belgians who live in the city (39%) and women (39%) who have the best impression of it.

Without being prompted, Belgians associate fair trade with **respect for producers** and with respect for the environment (especially the youngest). Belgians are particularly aware of the importance of fair trade for producers from the South and for the ecological and social transition; moreover, they feel they are doing a good deed when they buy fair trade products. Fair products are not seen by Belgians as something that is too alternative or as a marketing product. 39% of Belgians think that the presence of a label on a product triggers its purchase. This last trend is even more pronounced among the youngest (47%) and the higher-educated Belgians (47%).

Communication about fair trade can be improved.

57% of Belgians think that they receive too little information about this. It is those living in Brussels, the Walloons and the least-educated Belgians who think that they really do not receive enough information about fair trade. A list of the labels, the actual wages of the producers and the shops where the products can be found are the things that are requested most often; however the demand is not that pronounced (no one piece of information really stands out). Information about the actual wages of producers is mainly requested by the most educated respondents, while the less educated are more likely to want to know in which shops these products can be found.

The most legitimate sources of information are the fair trade organisations (mainly for the women and the oldest group); they are at the top, followed by the supermarket chains and the government (especially for the Flemish) or by the traditional media for those living in Brussels and Wallonia.

Belgians are very aware of the role they play in developing fairer trade. Yet they do not feel that they are the only ones responsible for this. The Dutch speakers believe that the government in particular has a role to play; French speakers meanwhile primarily point to the consumer. For the least educated, it is mainly the manufacturers who are responsible for the development of fair trade.



Belgians more or less agree that **fair trade should not be limited to producers from the South** (73%). Especially in Wallonia, among the highly educated and in rural areas, it is felt that fair trade should also concern Belgian and European farmers.

We see that 15% of Belgians do not know whether they buy fair trade products or not. On average, Belgians buy 2.5 different fair trade products per year. The three products that are most often bought are: chocolate, bananas and coffee (for more than one in three respondents), far ahead of the other products presented (tea, soft drinks, cereal products or other). Fair products are mainly bought in supermarkets (59%); it is the Flemish who buy fair trade products in specialist fair trade shops most often. Fair products are mainly recognised as such by their labels and certifications.

The price is both the main inhibitor and trigger for the purchase of fair trade products. There are big differences depending on the purchase frequency of fair trade products among the respondents:

- **Those who do not know whether or not they buy fair trade** do not know which products are fair trade and do not give it a lot of thought. They are in favour of a recognised label.
- **Those who never buy fair trade products** think they are too expensive, have never tried fair trade and are less interested in it (it is worth noting that 22% believe that there is nothing that could encourage them to buy fair trade products).
- **Those who rarely buy fair trade products** think that the selection is too limited.
- **Those who already regularly buy fair trade products** want a guarantee that the purchase of these products really has an impact.

We conducted analysis that revealed two profiles of non-buyers of fair trade products:

- A profile consisting mainly of young people, with a rather low level of education, who are in employment. This profile buys very few fair trade products. They see this as a hype or a selling point. They don't pay special attention to the labels and think there are too many of them. This profile corresponds to 6% of the population.
- A profile consisting of Dutch-speaking men from urban areas who live alone. They do not really give a lot of thought to fair trade, are not convinced by it, and believe that in any case the quality is lower than with normal trade. This profile corresponds to 5% of the population.



When it comes to the profile of those who buy more fair trade products, it is mostly women aged between 35 and 54 who are not responsible for the purchase and who have children at home all the time. People who fit this profile are convinced that their actions are important, have a real impact and make a difference. They also believe they need to adjust their lifestyle for the sake of future generations. They really feel they are doing a good deed by buying fair trade products. This profile corresponds to 25% of the population.

Among the respondents who buy fair trade products, product satisfaction is excellent with 65% satisfied consumers; the satisfaction score is also very high.

Most Belgians are willing to pay a little more for a fair trade product. However, this should not be more than 10% of the normal price.

Preference for local products

65% of the respondents think it is quite important to be able to buy fair trade products, especially the older respondents (69%) and respondents with a high level of education (72%)... But this is not the most important aspect for the respondents. When asked to rank 5 product types (fair trade, local, organic, ecological and ethical) according to the importance they attach to them, **local products are clearly the most important according to all groups** (40% of the respondents versus 21% for fair trade products). The type of product ranked second strongly depends on the profile of the respondent: the youngest particularly favour ecological products (22%), the inhabitants of Brussels organic products (27%), the Flemish and the oldest group fair trade products (29% and 24%).