Executive Summary

Consumer survey for the Forum Fairer Handel 2018

More and more people are purchasing fair trade products according to a consumer survey commissioned by the Forum Fairer Handel.

Since 2007, the Forum Fairer Handel has repeatedly commissioned representative surveys of the public on fair trade. The consumer survey for 2018 was conducted through computer-based personal interviews by Ipsos Operations GmbH in the course of an omnibus survey. 2,063 persons over 14 years of age were surveyed from April 16 to May 30, 2018. Respondents were chosen in a representative, stratified random sample selection from the full population for this survey (the German-speaking population in Germany in private homes aged fourteen years and older).

Respondents were asked about the following areas:

- Basic understanding of fair trade
- Consumer behavior: frequency of fair trade purchases
- Motivation: reasons to purchase fair trade products
- Obstacles: reasons not to purchase fair trade products
- Point of purchase of fair trade products
- Importance of the political claims of Fair Trade
- Importance of fair trade in the Global North

The data was mainly analyzed through descriptive statistics. For certain questions, differences in the responses of particular groups of respondents were analyzed. With regards to questions for which data from previous years were available, developments and trends over time were also analyzed.

The analysis of the data shows that respondents have a relatively good **basic understanding of fair trade** and that they strongly associate several of its basic elements with fair trade. The prohibition on child labor, support for fair wages and working conditions in developing countries, and payment of fair prices to producers are particularly strongly associated with fair trade. Other aspects that are essential parts of the fair trade concept were less strongly associated with fair trade. Examples of this are awareness raising of consumers on production conditions in developing countries as well as long-term trade relationships between producers in developing countries and their trade partners in Germany.

With regard to **consumer behavior**, the survey showed that two-thirds of respondents identify themselves as consumers of fair trade products. Although only 5.6% of respondents said they purchase fair products very frequently (several times a month), almost one-fifth of all respondents (18%) report buying fairly traded products regularly, i.e. at least once per month. In comparison to previous survey years, the share of consumers of fair traded products has reached a new high. The percentage of such consumers increased by more than 50% between 2009 (44%) and 2018 (69%). The share of regular consumers grew particularly strongly, more than doubling in the same period. At the same time, the proportion of respondents who claim not to purchase fair trade goods decreased between 2009 and 2018 by more than 40% and now stands at only 28.6%. The number of “absolute” non-consumers, that is, those who do not purchase and say that they would not purchase fair trade products, is less than half what it was (18.8% in 2009, 8.9% in 2018).

The survey also investigated the **motivation for the purchase of fair trade products.** As in previous years, avoiding child labor was by far the most important reason for buying fair traded products, although in comparison to other factors it was not quite the priority it had been previously. In 2018, more than 70% of those who buy fair trade products or at least support the purchase of such goods found avoiding child labor to be very important. This was followed by the quality of the products, fair prices for producers, and the guarantee that money will be used properly – reasons that were seen as very important by more than half of all respondents. Notably, over time environmentally-friendly production and organic quality was named as a very important reason by a growing group of consumers, which indicates that environmental aspects have become more significant for fair trade.

The question about **reasons not to purchase fair trade products** indicated that high prices and loyalty to conventional brands, in particular, demonstrate obstacles for buying fair trade products. This was true for non-purchasers as well as purchasers. Next, questions about information and credibility were named as a very important obstacle by approximately one-quarter of respondents. Non-availability of products was not considered to be an important argument against purchasing by a small majority. Although lack of availability is still considered a factor, the results generally indicate good availability of fair products.

Regarding the question about **places where fair trade products are purchased**, supermarkets (72.8%) and discount stores (63.5%) were named most frequently. In both cases an increase from previous years was witnessed, which has to be considered against the backdrop of an increase in the availability of these products in supermarkets and discount stores over the past years. Drug stores (25.5%) and organic food stores (24.2%), which followed as the most named points of purchase, do already represent less important purchase points for fair trade products, as do world shops (8.1%). World shops were named proportionately to their share of total sales in fair trade goods; their relatively low importance as sales points for fair trade goods (in terms of numbers) also in part reflects the difficult position of retail specialty stores generally.

The **political claims of Fair Trade** were agreed to by a significant number of respondents. Four out of five respondents agreed with all five demands for more climate justice, limitations to the market power of large retail corporations, legislation to ensure human and labor rights in production, fair public procurement, and tax discounts for fair products.

The majority of respondents also found **fair trade in Europe** to be important, with more than half even regarding it as very important. The proportion of respondents who consider fair trade in the Global North to be very important grew by 9 percentage points in comparison to 2016, the first time this issue was brought up in a survey by the Forum Fairer Handel.

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