

Presented to WWF Thailand



# The Research Study on Understanding Consumers' Perception and Behavior towards

## **“Sustainable Consumption and Production” (SCP)**

Conducted by CSN Research Ltd.

Date: 21<sup>st</sup> March, 2018

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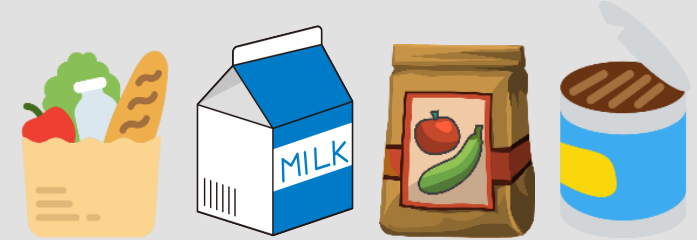
# Research Objectives and Methodology



# Research Background

## Main Objective

To gain understanding of consumer perception and behavior towards Sustainable Consumption and Production (SCP) in order to promote SCP program in Thailand



## Study area

To learn about consumer's awareness and knowledge on Sustainable Consumption and Production (SCP)

## Study area

To explore into current behaviors related with Sustainable Consumption and Production (SCP); utilizing survey results to design communication plan/campaigns for the promotion of SCP programs.

## The Initiatives

This study is driven due to facts that the majority of Thai are not aware of the environmentally-friendly products to consume



## Research Methodology

Qualitative and Quantitative researches were conducted to learn more of the issue.

- **Qualitative Study** – to gain better consumer's understandings, regarding sustainable consumption and food production system, and their current behaviors
- **Quantitative Study** – to measure interested topics and further use the results as a benchmark for future projects



# Research Methodology

## 1 Qualitative study

We conducted  
focus groups discussion

2 FGDs

G1: High Involvement  
G2: Low Involvement



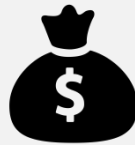
Survey Location:  
Bangkok

Fieldwork date  
11-12 Jan 2018



*Thai Male/Female aged 18-45 years old*

Socioeconomic Status: ABC+ (35,000THB)



Those who purchase food/fruit/vegetable from  
Supermarket/Hypermarket/Food market **at least**  
**2 times per week**

Main decision maker of household  
food/fruit/vegetable



## 2 Quantitative study

We conducted  
exit interviews among Tops  
shoppers

(Central Fashion Island, Central Rama II,  
Central Ladprao)

Sample size (n) = 240



Survey Location:  
Bangkok

Fieldwork date  
8-11 Feb 2018



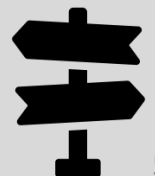
*Thai Male/Female aged 18-50 years old*

Socioeconomic Status: ABC+ (35,000THB)



Those who purchase food/fruit/vegetable from  
Supermarket/Hypermarket/Food market **at least**  
**2 times per week**

Main decision maker of household  
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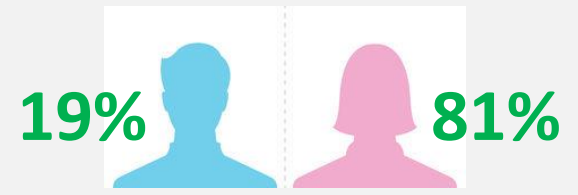
# Section 1: Getting to Know Your Consumers and General Shopping Behavior



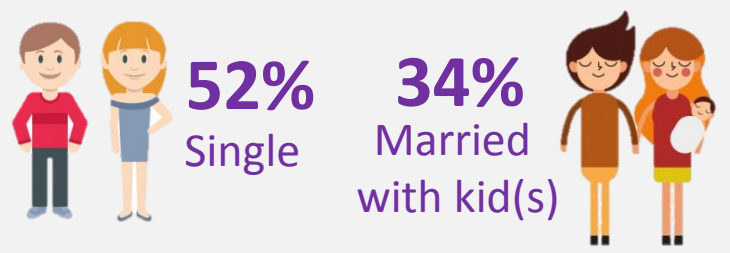
# Shoppers Profile



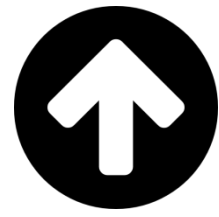
18-50 years old



Cover all occupations and education levels



Upper Mass Social Status



HIGH Involvement shoppers

## Value & Lifestyle

- Opened-mind and trying new things
- Healthier lifestyle (i.e. playing sports, exercise on a regular basis, etc.)
- Love to be seen as a good-looking person
- Put more importance on work-life balance in order to maintain good health

## Attitude towards Food Selection

- “Health conscious” when selecting food
- Need evidence to ensure food quality (i.e. focused on “Standard label and Cleanliness of food”), consider food source/traceability
- More concerned over how to eat healthy and save the planet

“My dad has problems with cholesterol and high blood pressure. Then, our family started to eat clean since then.”

LOW Involvement shoppers



## Value & Lifestyle

- More laid back personality and lifestyle
- More comfortable to stay in their “comfort zone”
- Satisfied with current routine lifestyle
- Not active and do not have many activities in daily routine

## Attitude towards Food Selection

- Food selection based on their indulgence
- Focus on “Price and taste” first in their mind
- Don’t’ care much about food source and health when purchasing food
- Less concerned over environmental issues

“Eating is one way to connect with friends and clients. Buffet is my favorite as I can eat as much<sup>7</sup> as I can.”

# Growing Health & Beauty Lifestyle

## Factors contributing to "Health Concern"

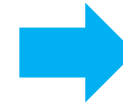


**Social media =**  
Easy to access Health and Beauty information. Many consumers are adopting healthier lifestyles, either through their choice of food or through exercise.



### "Fear"

learned through personal and others' health experiences



**Illness in family** = Increase awareness and concern over health and become more interested in choosing chemical-free food

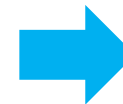


*"It is very easy to find someone with cancer nowadays."*



### "Lifestage"

'30-somethings' or Motherhood (only Females)



**Turning 30** marks the definitive end of youth. Consumers become more conscious about health: "Prevention is better than cure"



**After having a baby**, women worry more about overall health and beauty

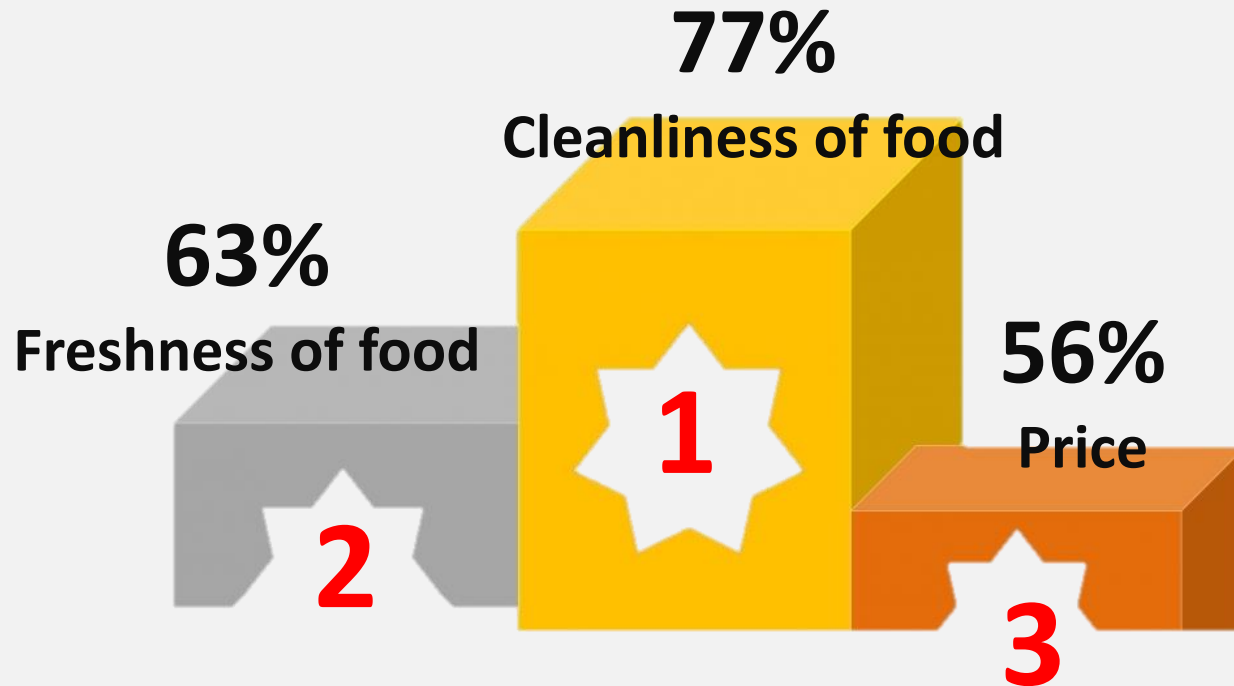


# Consumer Behavior

General Shopping Habit for  
food, vegetable, fruit, meat



## Top 3 Factors



## Other Factors

34% Label



28% Food Traceability

*"Real organic product needs to show its source."*



19% Food Process

*"Proper manufacturing facility gives us more confidence on food safety. It will be more beneficial for the manufacturer in the long run."*





## **Section 2: Perception, Attitude and Behavior towards Sustainable Consumption and Production (SCP)**

# Awareness and Definition of Sustainable Consumption and Production (SCP)

**36%** Aware  
about SCP

## Sources of awareness

**Online 55%**

**f** 20%  Website (13%)

**Offline 45%**  Free TV (38%)

## Brand Awareness of Sustainable Products



Most consumers are aware of these brands of organic food or chemical-free food. They place trust in these brands.

## Definition of SCP

(Spontaneous)



**19%** Food process that is chemical-free / organic



**13%** Healthy consumption



**11%** Food process that is clean and safe for consumers



**10%** Manufacturer with good quality or has been established in the market for a long time



**10%** Food process that does not cause deterioration of the environment.

*"Organic vegetable relies more on nature without chemicals involved in its cultivation. It means no toxic gases being produced."*

*"A product that is good for the environment must also be good for our lives."*

## Definition of SCP

(Aided)

**56%**

**Sustainable Consumption**  
= Food selection that put emphasis on the ecology, chemical-free, and effective resource utilization.

## Sustainable Production

**30%**

Farming without toxic chemicals



**27%**

Environmentally-friendly Farm / concern over ecology / biodiversity



**24%**

Food production that is environmentally-friendly



# Perception and Attitude towards Food Traceability and Process

Most consumers show interest to know more about source of food and its processing. It is important to know this information as it helps to build more confidence on cleanliness and safety of purchased food.

## Food Traceability



85%

**Show interest** to know about food traceability when purchasing food.

*"I would like to know about the source of food. I seek information about where it is produced or grown from which province. Also I want to know about the quality of soil, water, etc. , related to its cultivation."*

89%

**Admits** that food traceability has impact on their decision-making process

**Food traceability gives more assurance on...**

- 47% Cleanliness and safety
- 22% Food source
- 19% Credibility of food source
- 18% Food standard
- 16% Chemical-free product

## Food Process



83%

**Show interest** to know about food process when purchasing food

*"Chemical-free food production will definitely help our environment. It makes us want to buy that product."*

88%

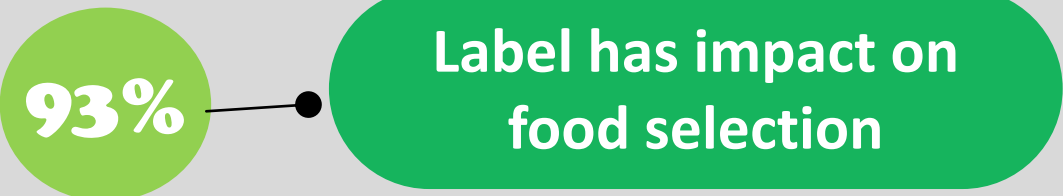
**Admits** that food process has impact on their decision-making process

**Food process gives more assurance on...**

- 62% Cleanliness and safety
- 24% Chemical-free
- 18% Good quality and standard
- 15% Credibility



# The Role of Label



- 98% Expiry date
- 90% Manufactured date
- 74% Price
- 69% Standard label for chemical-free

## Familiar Label

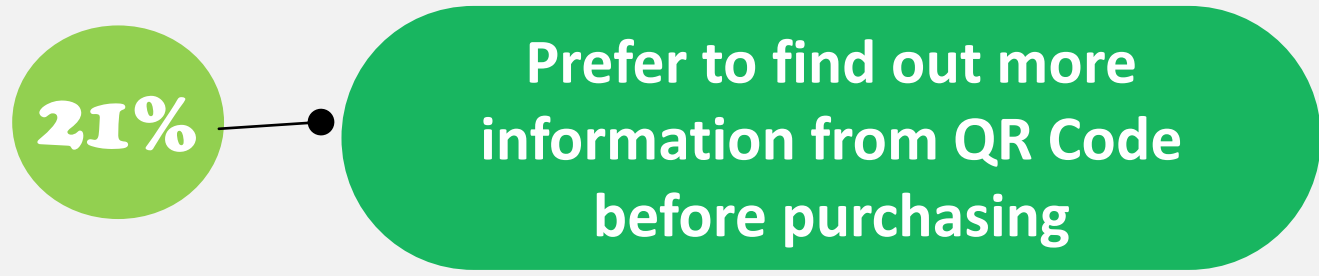


Chemical-Free Vegetable and Fruit -National Bureau of Agricultural Commodity and Food Standards – ACFS  
**61%**



National Bureau of Agricultural Commodity and Food Standards – ACFS  
**55%**

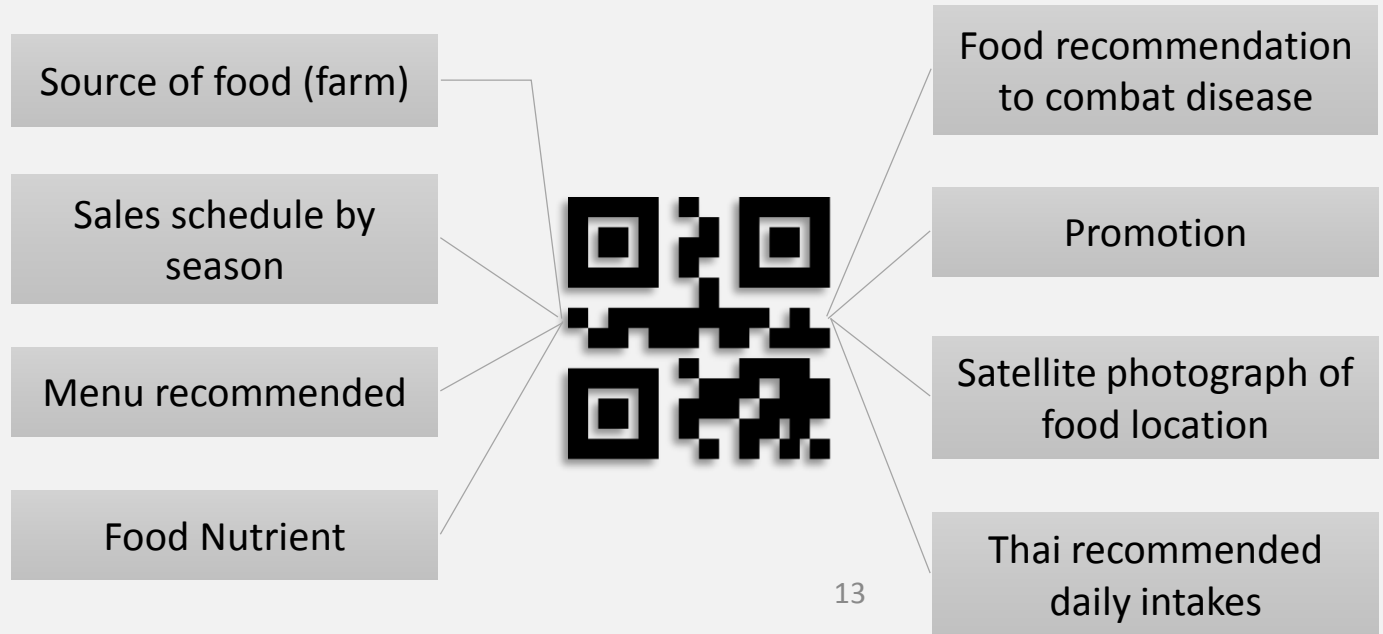
Good Agricultural Practice - GAP  
**58%**



Among those who not prefer QR code

- 55%** Too complicated (prefer to look at label directly) / easier and quicker
- 22%** Prefer to touch and see real products

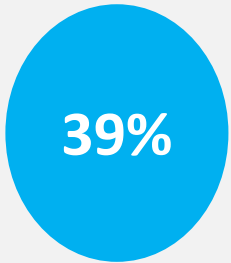
## Preferred information through QR Code on label



# High Cooperation from Consumers for SCP program



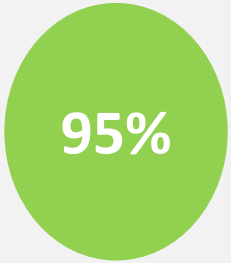
**Will not support** company without ethical environment policies



**Put more effort** to find SCP products / spend more time to find products



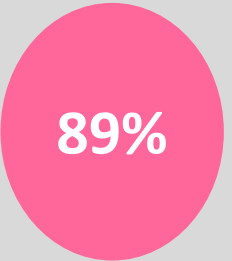
**Show willingness** to pay more for SCP products  
**approx. 20% higher price**



**Show willingness** to recommend others about SCP



# High Participation/Responsibility from Consumers for SCP program



**Show willingness** to participate and be responsible for SCP in the future



- 42%** Take care of their own and family's health by buying chemical-free products
- 40%** Support manufacturer who uses no chemical in the production process
- 13%** Reduce chemical usage in daily life/ use cloth bag / reduce styrofoam usage

# Impact on the Environment

**78%** | **Realize** that production and consumption have impact on climate

**28%** | **Aware** that food source is linked with de-forestation  
**67%** Manufacturer are involved with forest invasion  
**30%** Sell products from the forest

R E D U C I N G  
**F O O D**  
W A S T E

## Current Behavior on Food Waste

**76%**



Use up of raw materials; low to no disposition

**44%**



Garbage sorted by categories



# Perceived Barriers of Sustainable Consumption and Production

**92%**

## Lack of knowledge and realization of the importance of SCP

Thais lack knowledge on SCP, and they do not give an importance to it as well.



**81%**

## Less types of products

Chemical-free food is not available in all types of products.



**88%**

## Lack of proper public relation and expensive

Chemical-free food is expensive and, in Thailand, we still lack proper public relation, including information about SCP.



**78%**

## Unsupported by Government

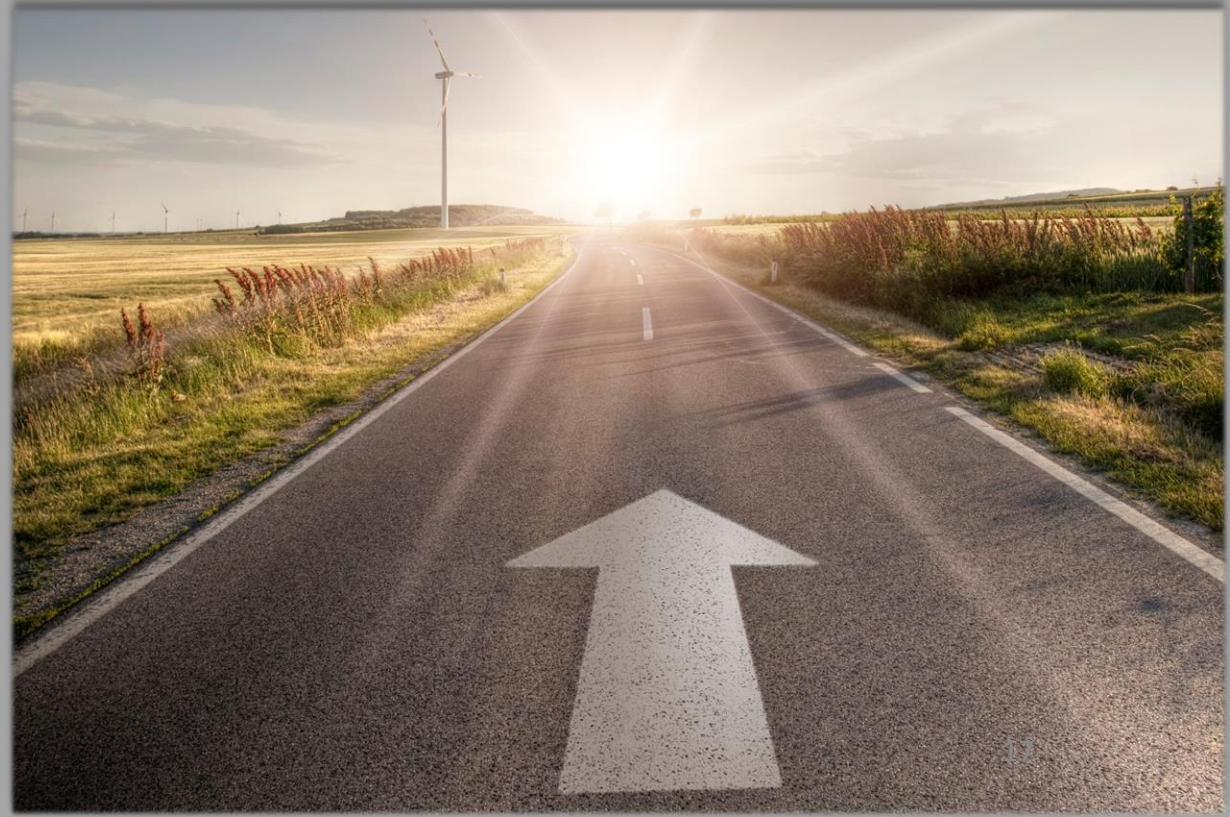
Thai Government does not support and gives importance to SCP.



*\*SCP abbreviated from Sustainable Consumption and Production*



# The Way Forward...



1

# Increase Awareness towards the Concept of SCP

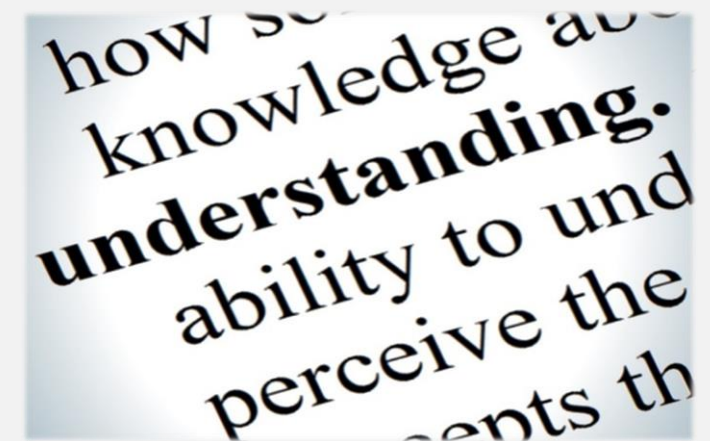


## Grow online presence and employ offline where is needed

**Online media** consumption has shown tremendous growth over the past few years among Thai consumers. It is recommended to use more social media i.e. Facebook, etc. to increase SCP's visibility. Offline media is another approach to be employed, especially to drive up the credibility of the organization or campaign.

## Provide correct understanding towards SCP

Currently consumers seem to have limited knowledge about the real meaning of SCP. Most consumers seem to put more emphasis on their own benefit, i.e. "Allowing me to have a healthier lifestyle through clean and safe products". The wider definition of SCP, such as the caring for the environment and consideration for the impacts on climate change, should be communicated more.



## 2

# Increase Preference towards SCP concepts and products



## Bring SCP closer to consumers' life

SCP is possibly seen as “same old story”. To draw more attention from consumers, new way of communication should be created, such as adding more fun elements into the message, rather being academic in tone. Additionally, the message communicated should be relevant to the consumers, relatable to them and their families.

## Show them how their contribution can make a difference

It is more difficult for consumers to realize how their separate contributions can make a difference. It would be great if WWF can show them the actual success stories in order to make them believe! The recent toxic haze situation in Bangkok is a good starting point to illustrate to them what causes it and what its effects are, such that they can be energized to prevent it from happening in the future.



# 3

## Convert Preference to Real Action



### Label is the key to communicate and motivate

Label is highly influential on how consumers choose SCP products. The necessary information, such as expiration date, manufactured date, and standard label of chemical-free, are needed to be clearly shown on the packaging.

### Increase convenience to purchase

Due to heavy traffic in Bangkok, consumers put a priority on convenience. The wider availability of SCP products which “can be purchased at my regular store” is preferred.



### Make price affordable

Given economic situation, price is one of the key considerations in a purchase decision. Consumers are not willing to accept more than 20% price premium on SCP products.





### Do it together with partners to speed up the process – to build bridge between SCP and consumers

It is difficult for WWF (Thailand) to make this change alone. It is a good idea to have joint cooperation from other companies to strengthen what it lacks. Certainly, it is great to extend distribution channels by working with major food retailers to promote and sell SCP products in Thailand.

# Appendix



# Interview in Tops Supermarket (3 branches)



**Thank you...**