



Organic Centre Wales focus group research for MGBPR

October 2011

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Introduction

MGBPR have been commissioned by Organic Centre Wales to produce PR messages for organic products. Following on from previous quantitative market research carried out by Beaufort research, MGBPR developed a number of positioning statements and benefit statements for organic produce. Trilein were commissioned to conduct a small scale additional qualitative piece of research to assess the reaction of potential consumers.

This report provides an overview of the commission and outlines the key findings of the research.

Statements

We were provided with a series of statements by MGBPR as follows:

Positioning statements

Welsh organic: buy a little, get a lot

Focus on the purchasing decision. Implies that small steps deliver big benefits.

Welsh organic: the natural choice

Focus on 'natural' and potential associations with health and the absence of chemicals and pesticides. Implies that the benefits are obvious and real.

Welsh organic: locally produced, definitely different.

A clear focus on provenance with a strong suggestion of the benefits over non-organic produce.

Welsh organic: naturally produced, definitely different

A clear focus on natural production and associated health and chemical and pesticides benefits, with a strong suggestion of the benefits over non-organic produce.

Welsh organic: locally produced, naturally different

Blends provenance with the benefits of 'natural'.

Benefit statements

Chemicals/Pesticides

Know what's in your food

Food you can trust

Family friendly food
Fewer pesticides
Fewer additives
Fewer pesticides & additives

Natural food

The natural choice
More natural choice
More natural food
Great natural food
Naturally tasty food
Lovely and natural
Healthy, natural food

Taste

Leaves a good taste
Lovely and tasty
Great tasting food
Naturally tasty food
Natural, tasty food

Environment

Better for the environment
In tune with the environment
Protecting the environment
Easy on the environment
A vote for the environment
Caring for our land

Animal welfare

High animal welfare
A vote for good animal welfare
A vote for high animal welfare

Local

Good for Wales
Healthy for Wales
Local and lovely
Lovely and local

Wildlife

A vote for wildlife
Supporting wildlife
Protecting wildlife

Purpose and scope of research

The overall objective of the research was to find out which of the positioning and benefit statements outlined above is/are most compelling when it comes to convincing consumers to buy organic.

The research aimed to determine:

- 1) Which statements work best to convey the benefits of organic (or go further and enhance it)?
- 2) Which elements of the messages work well and why?
- 3) Is there a rank order that messages can be fitted into?
- 4) What are the links (if any) between statements e.g. "natural" and "chemicals/pesticides" and "health"?

Approach

Given the existing quantitative research from Beaufort and also the available resources, we were asked to conduct a small number of focus groups to explore a small number of questions in greater detail.

Prior to conducting the work we reviewed the Beaufort research and the consumer messaging document produced by MGBPR.

We devised a short topic guide for the focus groups and piloted it – the format worked well and did not require any revisions. A copy of the guide is attached as Appendix 1.

We scheduled 5 focus groups. We targeted respondents that fitted the principal audiences for the messages devised by MGBPR; these were identified in the Beaufort research as:

- 🐾 Organic environmentalists – being generally positive about organic produce but with a strong emphasis on the environmental benefits and also a concern for food

provenance. The Beaufort research notes that this group tended to have a higher representation of ABC1 'social class' categories within it, and tended to attend food festivals and

- ▶ Price and origin conscious – price being a major barrier to organic consumption and provenance also being important to them. The Beaufort research indicated that this group tended to be slightly older, with more C2DE 'social class' category representation

The focus groups were held across South Wales in larger urban areas and smaller towns and villages. The timescale required a swift turnaround and so participants were recruited through organisations and networks in the various areas, including lifelong learning groups, social networks and environmental organisations. The targets were the organic environmentalists and, to a lesser extent, the price and origin conscious categories identified by the Beaufort research.

Incentives for participation of £15 per head were provided.

28 people participated, with each group containing a minimum of 5 participants. Focus groups lasted between an hour and an hour and a half each and were held in:

- ▶ Abergavenny
- ▶ Cardiff
- ▶ Nantgaredig (Carmarthenshire)
- ▶ Pontardawe
- ▶ Swansea

The focus groups were all conducted between 12th and 21st October 2011.

Findings

This section provides a summary of the findings of the focus groups, providing discussion of the perceived relative merits and drawbacks of the positioning statements and benefits statements, as well as some consideration of specific terms.

Positioning statements

Ranking

Respondents were initially asked to review the five positioning statements and asked to give an initial reaction, prior to discussion, of which ones worked. In all but one of the focus groups a ranking of the statements was quickly arrived at. The two most popular statements (equal in ranking) were:

- ▶ “Welsh organic: locally produced, naturally different”, and
- ▶ “Welsh organic: the natural choice”

The next most popular were:

- ▶ “Welsh organic: naturally produced, definitely different”, followed by
- ▶ “Welsh organic: locally produced, definitely different”

The least popular positioning statement (in all focus groups) was:

- ▶ “Welsh organic: buy a little, get a lot”

Following this initial ranking, respondents were asked to consider the statements in further detail.

Welsh organic: buy a little, get a lot

There was some discussion about the importance of making reference to cost (a key determinant in purchasing decisions). Generally, as currently phrased, this statement generated negative feelings – in many cases it provoked an immediate association with ‘cheap’ advertising/branding (e.g. ‘buy one get one free’). The association with quality (the ‘get a lot’) element did not translate effectively, and many respondents felt that this was too close to existing supermarket marketing messages, which in many cases further underlined their initial impressions of it sounding ‘cheap’ or ‘low value’. Further, many also felt this was too ‘bland’ as a positioning statement.

However, making some reference to price was considered useful – most respondents had the perception that organic produce was expensive. However, this particular positioning statement did not work in allaying those concerns whilst also promoting the benefits of organic. There may be merit in exploring alternative statements that play on the price element. One group suggested the replacement of the word ‘get’ with ‘save’, which they felt would give the phrase a stronger meaning.

Nevertheless, even after more detailed discussion, this statement remained the least popular positioning statement for all groups.

Welsh organic: the natural choice

There was an initially strong positive reaction to this, and there were positive reactions to its conciseness. But on further discussion most groups concluded that it was relatively bland in comparison to other statements and sounded too similar to other positioning statements they had heard for other products/brands. Some felt it was a phrase that was 'over-used'.

The words 'natural' and 'choice' were well received and had positive connotations. 'Natural' suggested to people that what they would be buying would be good; that it is healthy and fresh. But the play on words in this instance was felt to be too obvious leading some to describe it as 'false sounding' even though they liked the individual words.

The concise nature that won favour with many respondents initially was also the main negative element that reduced this in people's rankings following further discussion.

Welsh organic: locally produced, definitely different

The phrase 'locally' meant different things to different people, and it was felt to be a little too indistinct by many, albeit provenance was important to all groups and 'local' is an important issue. Several felt that to make sense, the word 'local' needed some further context. What was not picked up through this and other positioning/benefits statements, was that many respondents were interested in a 'local' origin for produce because it suggests minimisation of food miles. This was a very important factor for many respondents; respondents were generally quite environmentally aware and this played a strong role in their decision-making.

Many respondents did not like the term 'definitely', with some feeling it suggested an elitist element to the phrase. It also provoked a question of 'different to what?' Most realised its actual intent (i.e. different to non-organic) but this was not an immediate reaction to the phrase.

The phrasing also struck several respondents as being too absolute – it did not have the gentler play on words that other phrases had.

Welsh organic: naturally produced, definitely different

This was felt to be clear, and positive. 'Naturally produced' was preferred by many to 'locally produced' in terms of immediately conveying the benefits of organic food. Again, many asked 'different to what?'. Some were unsure that they wanted their organic food to be that 'different' or argued that many people, themselves included, generally did not want to be 'different'.

Some felt that this statement had a less 'commercial' sound (this was a positive reaction).

Welsh organic: locally produced, naturally different

'Naturally different' was felt to be stronger than 'definitely different' as a phrase, though the word 'different' remained a sticking point for several respondents.

One suggestion was the replacement of the term 'different' with the term 'better' and another group suggested 'locally produced – naturally!' as an alternative that they felt would work better.

Overall, this was the favourite from the choices provided, rising above 'the natural choice' after some discussion, although there is scope for some further revision, notably to address the dislike of the word 'different'.

Healthy food/natural food

Before moving onto the benefits statements, respondents were asked what the terms 'healthy food' and 'natural food' meant to them.

Much of the discussion and initial responses from people were focused on what healthy and natural food was not; in other words focusing on the production/processing of the food. Respondents clearly and strongly linked 'healthy food' with the lack of pesticides/chemicals/additives and degree of processing of the food, relating this to direct health benefits.

There were several benefits of organic food (see next section on benefit statements and the relative importance of the various benefit factors). But in terms of health, the production and processing of food (and particularly chemicals/pesticides/additives) were the key issue. The absence of these was what constituted 'natural food' for many respondents. As such, many respondents used the phrases 'healthy food' and 'natural food' interchangeably during the discussions in this section. 'Natural' did have other connotations (notably environmental) when discussed in earlier and subsequent sections, but in this discussion it was strongly linked to health.

In most cases the phrases and terms provided were positive, though there were some negative connotations also (these were in the minority).

The following are the key words/phrases that were raised in relation to what 'healthy food' meant to people. They are grouped for convenience under sub-headings but they are not provided in any particular order.

Key words respondents associated with 'healthy food'

Types of food

- 👉 Fruit and veg/5 a day
- 👉 Vitamins and minerals
- 👉 Grains
- 👉 Bird seed
- 👉 Pulses, lentils
- 👉 Granola
- 👉 Cereal bars
- 👉 Herbal tea
- 👉 Protein – tuna, fish, walnuts

Perceptions of producing/processing

- 👉 Unprocessed
- 👉 Free from chemical contamination/chemical free
- 👉 No pesticides
- 👉 Not reassembled

- Not fast food
- Not ready meals
- Care in handling/keeping
- No GM
- Hygienic but not sanitised
- Safer product
- Home grown
- Homemade
- Land not destroyed
- Wellbeing of animals

Direct relation to benefits to the body

- Not harmful to you
- Good for you/do you good
- Good for your body
- Not likely to make me ill
- Energy/energising
- Good for waist line
- Fitness
- Macrobiotics
- Nutritional/nutritious

Qualities of the food

- Raw
- Fresh
- Balanced
- Wholesome
- Tasty/flavour
- Low fat/good fat

Negative connotations to the term 'healthy food'

- More expensive
- Possibly shorter shelf life
- Yoga types

Benefit statements

Prior to discussing the benefit statements, respondents were asked to rate the importance of a series of benefit factors as follows:

Local

Natural food

Taste

Chemicals/pesticides

Environment

Animal welfare

Wildlife

Most found it difficult to differentiate between the relative importance of the different factors. Benefits to wildlife were slightly less important, as was 'natural food', but not greatly so. There were variations between groups, but there was no one element that stood out overall as more important than the others, with the remainder largely scoring equally overall.

Respondents were then provided with a series of benefit statements in each benefit area, one benefit area at a time, and asked which worked best to convey the benefits of organic for that particular benefit factor, and why.

Local

The benefit statements for this benefit factor were:

- Good for Wales
- Healthy for Wales
- Local and lovely
- Lovely and local

Respondents did not favour any of these as a means of conveying the 'local' element. The 'Welsh organic' element of the earlier positioning statements conveyed the provenance factor, whereas respondents tended to consider 'local' as a much more restricted geographical locality (this varied in distance but was regional or sub-regional, often quite a short distance from people's homes of perhaps under 10 miles). 'Local' was an important factor in terms of reducing 'food miles' and reduction of environmental impact by minimising distance between the point of production, through processing (where relevant) to point of sale. None of the above benefit statements was felt to adequately convey this.

The use of the word 'lovely' in both contexts was felt by many to be patronising, drawing on a negative (to them) Welsh stereotype. It drew strong negative comments across all the focus groups – neither of the latter two

phrases containing the word found favour amongst respondents and should not be used. The former two were considered better, but relatively weak.

The benefit statements in this area need some further work. 'Buy local' was one suggested alternative; another was 'Love to be local'.

Natural food

The benefit statements for this benefit factor were:

- 🐾 The natural choice
- 🐾 More natural food
- 🐾 Naturally tasty food
- 🐾 Lovely and natural
- 🐾 Healthy, natural food

'The natural choice', as with the positioning statements, was felt to be an overused phrase and too bland. A suggested alternative to this was 'the healthy choice'.

Similarly, 'more natural food' was also felt to be too bland.

'Naturally tasty food' was second choice in many groups to the more popular final statement – the shortened 'naturally tasty' was preferred by some respondents.

Again, the word 'lovely' was not well received for the same reasons as before, and it should be avoided. The phrase 'lovely and natural' was unpopular amongst all respondents.

'Healthy, natural food' found most favour of these phrases, combining the health and nature messages. Another suggested alternative was 'Food that's natural'.

Taste

The benefit statements for this benefit factor were:

- 🐾 Leaves a good taste
- 🐾 Lovely and tasty
- 🐾 Great tasting food
- 🐾 Naturally tasty food
- 🐾 Natural, tasty food

'Leaves a good taste' was disliked by all of the groups, and made some think of toothpaste commercials or actually provoked thoughts of 'bad taste'.

Again, the word 'lovely' did not find favour with any respondents and the statement 'lovely and tasty' should be avoided.

'Great tasting food' was felt to be bland and overused – it was felt by many to be too close to other statements associated with food (e.g. recipe books or

restaurants). It did not provoke strong negative reaction, but neither did it find strong favour.

There was little to choose between the 'Naturally tasty food' and 'Natural, tasty food' statements – both were well received by all groups. Some preferred the way in which the former flowed, others liked the spacing of the second.

Chemicals/pesticides

The benefit statements for this benefit factor were:

- 🐾 Know what's in your food
- 🐾 Food you can trust
- 🐾 Family friendly food
- 🐾 Fewer chemicals and pesticides
- 🐾 Fewer pesticides and additives

'Know what's in your food' had a mixed reaction – it was generally positively received, but several thought it a little bland, whilst others thought it related more to knowing what was not in their food. One group did find this the most positive statement as it reinforced that the consumer was making an informed choice.

'Food you can trust' reminded some people of M&S but found favour amongst most respondents and was the most popular of the chemicals/pesticides benefit statements.

'Family friendly food' was felt to be too bland by most respondents and suggested that organic was something targeted at families whereas respondents felt that the message should be wider than that. None of the groups strongly favoured this statement.

The word 'fewer' was felt to be weak in the latter two statements, not least because for many it suggested that whilst there was less, the use of the term fewer suggested there were still some chemicals/pesticides in the food. Neither of these two phrases found strong favour with respondents and in most cases drew a negative reaction.

Environment

The benefit statements for this benefit factor were:

- 🐾 In tune with the environment
- 🐾 Protecting the environment
- 🐾 A vote for the environment
- 🐾 Caring for our land

Many respondents liked the first statement, though some felt it too long. A suggested amendment was to replace 'the environment' with 'nature' to

reduce its length but largely retain its meaning. One group felt it conveyed a 'hippy' consumer group association, which was a strong negative association for them.

'Protecting the environment' drew positive comments from most groups, though one group felt that they did not believe it. Another group felt that the word 'protecting' was overused.

A vote for the environment drew largely negative reaction to the word 'vote', though one group did like this statement (though not as strongly as the 'in tune with the environment' statement). People often found it difficult to articulate why, but there was a sense of being patronised by this term. The use of the term 'vote' should therefore be avoided.

'Caring for our land' was felt to be bland and was described as 'twee', though the word 'caring' was positively received. The word 'our' was felt to be quite strong, and might be used in some of the other phrases in place of 'the'. A possible alternative for this statement could be 'caring for our environment'.

Animal welfare

The benefit statements for this benefit factor were:

- ▶ High animal welfare
- ▶ A vote for good animal welfare
- ▶ A vote for high animal welfare

None of these phrases adequately conveyed the necessary messages to respondents and these drew strong negative reactions. This may be an area where the term 'caring' or a similar word would be useful to include. The word 'vote' again drew negative reactions.

These statements require some further work. Alternatives suggested were:

- ▶ Promoting animal welfare
- ▶ Ensuring animal welfare
- ▶ Enhancing animal welfare
- ▶ Raising animal welfare
- ▶ A fair deal for animals
- ▶ Kinder to animals
- ▶ Animal friendly

Another suggestion was to use the word 'better' in place of 'high' in the first statement.

Wildlife

The benefit statements for this benefit factor were:

- ▶ A vote for wildlife

Supporting wildlife

Protecting wildlife

There were no phrases that drew a strong positive reaction in this section, though the last statement was generally felt to be better.

Again, the term 'vote' was poorly received amongst respondents with no support for the first statement.

'Supporting wildlife' was better, though the word 'supporting' was not felt to have a strong enough meaning by most.

'Protecting wildlife' was the best received, though it did not generate a strong positive reaction, and one group (which was the only group that preferred the second statement overall) felt that the term 'protecting' was difficult to back up in this context.

Use of the word 'caring' was again suggested for this section. These statements may also require some further work.

Other comments

Comparisons were made with the success of the fairtrade brand, but also some respondents stated that sometimes their only choice of an organic product might come from some distance away, conflicting with their environmental values to minimise 'food miles' (the 'local' in this respect was important but it was questioned how often it was really local). Some respondents also commented that they had at times had to make a choice between an organic and a fairtrade product.

The success of the fairtrade brand in sales by 'telling a story' was reflected on by one group, and this might be worthy of further exploration as this had clearly been effective as a means of getting them to buy fairtrade products.

Appendix 1 – focus group topic guide

Purpose of research

The information generated from these groups will be provided to MGB, who deliver marketing consultancy to Organic Centre Wales.

The purpose of the research is to understand attitudes to and preferences for various organic messages. These messages may be used in various marketing activities.

We will make a note of your names but we will not quote you and we do not require any contact information from you. Any comments that you make cannot be identified through the research and you will not receive any contact from MGB PR, Organic Centre Wales or Organic producers as a result of this research.

There are no 'right or wrong' answers and all opinions are valid. We want a conversation, but please try not to talk over one another so that we can make notes.

The session should take no longer than an hour and a half to complete.

At certain points there may be some interesting discussion but we will need to move things on and may have to stop discussion. If we do and you feel strongly that you have not made your point, please make a note of it (paper and pens provided) and we can discuss it with you at the end.

Are there any questions?

Is everyone happy to proceed?

Before starting

Before starting, ask people to introduce themselves and to say how often they buy organic and how many different products they buy organic for. This will give a sense of the type of people in the room.

A. Positioning statements

Which of the statements below best conveys the benefits of Welsh organic food? Pick favourite and least favourite.

Welsh organic: buy a little, get a lot

Welsh organic: the natural choice

Welsh organic: locally produced, definitely different

Welsh organic: naturally produced, definitely different

Welsh organic: locally produced, naturally different

What are the good points and bad points for each of the positioning statements? What thoughts does each bring to mind? Further detail on what each is trying to convey is provided below, along with prompting questions.

Welsh organic: buy a little, get a lot

This one is intended to focus on the purchasing decision. It implies that small steps deliver big benefits.

PROMPTS: Does the focus on 'buying' work? Is the sentiment one that works? What do they think are the 'value for money' elements that can justify spending more on an organic item than a non-organic item? Is raising the issue of price a good or bad idea?

Welsh organic: the natural choice

This one focuses on the 'natural' element of organic, and potential associations with health and the absence of chemicals and pesticides. It implies that the benefits are obvious and real.

PROMPTS: What does the term 'natural mean' to people? Does it instil a particularly strong positive (or negative) response? Do they associate 'natural' with chemicals/pesticides? Are the 'health' benefits strong related to the term natural? In what ways?

Welsh organic: locally produced, naturally different

Blends provenance with the benefits of 'natural'.

PROMPTS: What does 'naturally different' mean to them? How important is local? How do they think of 'local'? Do the local and natural work well together? Which of the two is the more important or are they of equal importance? Does the absence of something relating to price/value matter?

Welsh organic: locally produced, definitely different

This one places a clear focus on provenance with a strong suggestion of the benefits over non-organic produce.

PROMPTS: Does the 'local' speak to people? Is this a strong motivating factor for them? Why? What do people think it means when it says 'definitely different'?

Welsh organic: naturally produced, definitely different

A clear focus on natural production and associated health and chemical and pesticides benefits, with a strong suggestion of the benefits over non-organic produce.

PROMPTS: Does the focus on 'natural' need to be emphasised as being 'different'? Do they think of organic food as being very different? How/in what ways?

Having looked at them in more detail, is the ‘best’ one originally chosen still the most powerful? Rank the statements above in terms of which one works best to convey the benefits of organic. Does the overall ranking feel about right? Would the one that has come out top work for most people in the room? If not, which is next best?

What does “healthy food” mean to you?

What’s the difference between healthy food and normal food?

PROMPTS: Does it have more of something in it or less of something in it? Is healthy food the same thing as natural food?

B. Benefit statements

When you think of organic food, how important are the following issues? Are there any that are not at all important in your purchasing decisions? Explore why.

	Low importance				High importance
Local	1	2	3	4	5
Natural food	1	2	3	4	5
Taste	1	2	3	4	5
Chemicals/Pesticides	1	2	3	4	5
Environment	1	2	3	4	5
Animal welfare	1	2	3	4	5
Wildlife	1	2	3	4	5

I am going to give you a set of statements on these subjects, and I want to discuss these and agree the statement that best reflects what you feel about that topic. Which of the statements best conveys the benefits of organic food in that area? What are the good points/bad points for each? Are there any that work particularly well or any that really do not work? Why?

Local

Good for Wales
 Healthy for Wales
 Local and lovely
 Lovely and local

Natural food

The natural choice
 More natural food
 Naturally tasty food
 Lovely and natural
 Healthy, natural food

Taste

Leaves a good taste
 Lovely and tasty
 Great tasting food
 Naturally tasty food

Natural, tasty food

Chemicals/Pesticides

Know what's in your food

Food you can trust

Family friendly food

Fewer chemicals & pesticides

Fewer pesticides & additives

Environment

In tune with the environment

Protecting the environment

A vote for the environment

Caring for our land

Animal welfare

High animal welfare

A vote for good animal welfare

A vote for high animal welfare

Wildlife

A vote for wildlife

Supporting wildlife

Protecting wildlife

Thank respondents for their time, provide incentives, and end session.

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