

Value of Welshness

Shopper Desire for Welsh Produce



Bwyd a Diod Cymru
Food & Drink Wales



Summary of Findings

Welsh shoppers think that food and drink from Wales is Great Quality (85%) and Great Tasting (80%).

8 out of 10 shoppers (78%) would always buy Welsh if the price was right and 44% would pay more for Welsh.

Shoppers outside of Wales also believe that Wales is known for good quality food and drink and would like to support Welsh food and drink. 29% would like to see more Welsh food and drink in their shops.

Wales is more associated with naturalness than GB.

The scope for growth in Welsh products is substantial and there is strong shopper support for food and drink from Wales. The evidence suggests that Welsh branding sits well with, and enhances GB branding.

The Value of Welshness

The Context

The Welsh Food and Drink priority sector has an ambitious target to increase turnover by **30%** to £7bn by 2020. Key to meeting this target are growing, successful Welsh food and drink businesses.

Whilst the Welsh industry is making strong progress towards the target, it also faces a highly competitive retail market. The rise of the discounters over recent years has had a dramatic impact on the dynamics of the retail sector.

The Opportunity

There are around 3,700 Welsh products currently available in Wales at retail level. With a single retailer listing between 20-30,000 products, the scope for growth is substantial.

Many thriving Welsh businesses use strong Welsh provenance in their branding, such as Puffin Produce, Blas Y Tir, Edwards of Conway and Village Bakery to name but a few. In addition, the recent launch of Welsh Lamb within Aldi has delivered substantial incremental growth.

A key question for the Welsh food and drink sector is what value do shoppers in Wales and the rest of GB place on Welshness?



The Research

Category-Insight was commissioned to conduct robust research to answer this question.

An online survey of over 1,000 GB shoppers was undertaken, with a further 331 Welsh responses to boost Welsh results and a street canvass of 318 shoppers in three Welsh locations.

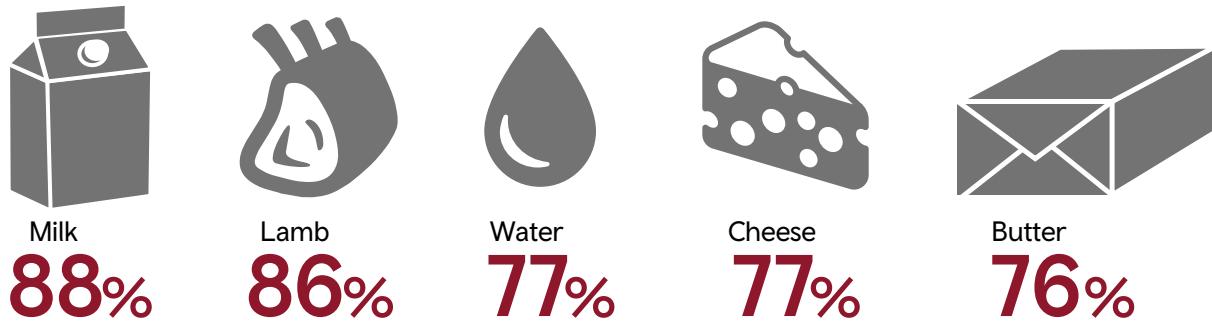
The results provide a robust insight into the views of shoppers (95% confidence level, and confidence interval of +/-3% at GB level, and +/-5% for Wales). The results are set out overleaf.

What do shoppers in Wales think?

Strong preference for Welsh Products

78% of shoppers in Wales say that they would always buy Welsh if the price is right, and nearly **90%** of those asked in the street canvass say they would always choose Welsh if there was no difference in price.

More than 8 out of 10 Welsh shoppers would prefer to buy Welsh Milk and Welsh Lamb and more than 7 out of 10 shoppers preferred to buy Welsh Water, Cheese and Butter. In addition, more than half would prefer to buy Welsh Cauliflower, Chicken and Pies.



The overriding result shows that Welsh shoppers would like, at least, a choice of Welsh products in Welsh stores. This result is likely to hold true across other categories given that 78% of shoppers said they would always buy Welsh at the right price.

Supporting the local economy

There is a strong association between buying Welsh and supporting the local economy:

- **84%** of Welsh shoppers in the on-line survey like to support Welsh food and drink producers
- **78%** of street survey respondents say that buying Welsh helps the local economy.

It is the combined impact of strong quality attributes, together with supporting the local economy, that drives 74% of Welsh shoppers to want more Welsh food and drink in their shops.

Freshness, Quality and Price

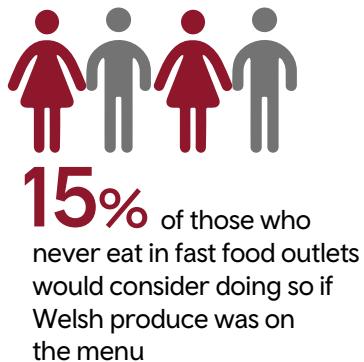
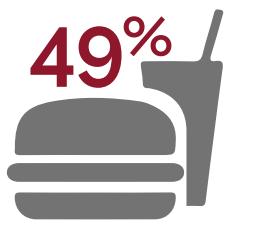
In shoppers' hierarchy, freshness, quality and price are the most important factors in informing the decision to buy.



Welsh shoppers have a higher regard for Welsh food and drink, than the GB shopper have of either GB or Welsh food and drink.

Eating Out

When eating out



What do shoppers outside of Wales think?

Wales is associated with Naturalness

Welsh shoppers see food and drink from Wales as great quality, fresh and natural. However, across GB overall, more people associate Wales with natural food and drink (**42%**) than GB (**33%**). With health and freshness being macro trends in food and drink, this positive association between Welsh and naturalness is a valuable attribute of Welsh produce.



GB shoppers support Welsh food and drink

GB shoppers (outside Wales) are supportive of Welsh food and drink with over half agreeing that Wales is known for producing good quality food and drink, and a quarter wanting to support Welsh food and drink producers. Nearly 15% want to see more Welsh food and drink brands in the shops.

PGI Welsh Lamb is well recognised

For GB shoppers outside Wales

- **44%** select PGI Welsh Lamb above any other lamb.
- **40%** naturally associate lamb with Wales.
- When asked why they choose Welsh lamb, the most popular reasons given are to do with quality.



For shoppers within Wales

- **86%** select PGI Welsh Lamb above any other lamb.
- **78%** naturally associate lamb with Wales.

These are positive findings for PGI Welsh Lamb, demonstrating strong consumer preference across GB. The evidence is supported by actual retail sales. Aldi saw sales of lamb increase by **25%** when it switched to Welsh branded.

Other Welsh products also have recognition

The survey also found that nearly 1 in 5 of GB shoppers would choose Welsh Butter (22%), Welsh Cheese (18%) and Welsh Water (17%) when given a choice.

What does Welsh mean to all shoppers (Wales and GB)?

The survey found that where food and drink is produced is as important as appearance and brand.

Beyond freshness, quality and price, all shoppers (Wales and GB) share the same views on the top 3 attributes of Welsh brands that they know – these being great quality, fantastic tasting and 'I like that it's produced in Wales'.

Great Quality

Like that it's produced in Wales

Fantastic tasting product

When buying Welsh products, the majority of shoppers expect the product to be '**Made in Wales'** and have the '**Main ingredients from Wales'**.

Are Welsh Products available?

78% of Welsh shoppers regularly buy Welsh produced food, with the key category mentioned being milk. **67%** of the Welsh population claim to buy Welsh milk regularly.

Only a third of Welsh shoppers buy other key categories regularly such as lamb, vegetables, cheese and eggs. Availability is a major constraint:

- **20%** of Welsh shoppers in the street survey say that the products they want to buy are not available. Key categories unavailable are vegetables, fruit, meat, milk, lamb and cheese.
- In the online survey, **74%** want to see more Welsh food and drink brands in their shops even though many say they can easily find Welsh food and drink products.
- Outside Wales, shoppers say that they cannot find Welsh food and drink in stores and **29%** want to see more Welsh brands in their shops.

Conclusion

Welsh shoppers would like to buy more Welsh products, but availability is limited for many.

A large section of Welsh consumers believe that restaurants and fast food outlets should have menus that make more of using Welsh ingredients.

Outside of Wales, Welsh lamb is well recognised and seen as quality. For some shoppers, Welsh products are preferred across a range of categories, showing that a choice of Welsh would appeal.

Welsh is seen as more natural by shoppers, and the Welsh brand sits well alongside GB branding.

Most shoppers believe that Welsh means made in Wales with ingredients from Wales. Top Welsh brands that shoppers know stand for 'great quality' and are seen as 'fantastic tasting'. Consumers 'like that they are produced in Wales'.

The research provides evidence to show that Welsh brands can use "Welshness" to enhance their proposition inside and outside of Wales.