Value of Welshness

Workshop
Key Findings

Shoppers would prefer to buy more Welsh products, but are hampered by availability

- 3,702 “Welsh” sku’s are listed in retail. As one major multiple alone can stock 20,000 - 30,000 sku’s. There is significant opportunity for more.

- In many core categories 8/10 Welsh shoppers would prefer to buy Welsh vs GB products.

- Outside of Wales, nearly half of shoppers would prefer to buy Welsh Lamb over British Lamb.
Outline of Today’s Presentation

• Approach to the work
• Key Findings
  – GB and Welsh attitudes towards Food and Drink
  – What do Welsh shoppers want (retail and foodservice)
  – What do GB shoppers outside Wales want
• Brands
• What should Welsh mean?
• Case Studies
• How to Best Disseminate the findings
Value of Welshness

Approach to the work
Delivering Robust Results

On Line Survey of 1,062 GB Shoppers
Confidence Interval+/-3%
95% Confidence Level

Welsh Boost of an Additional 285 Shoppers
Confidence Interval+/-5%
95% Confidence Level

302 Shoppers at Fastfood and Food Retail Outlets

Street Canvass
Cardiff
Aberystwyth
Caernarfon
Value of Welshness
Attitudes towards food and drink
What Matters Most

Firstly
Freshness, Price and Quality
Then ..
Brand, Where produced and Appearance

• It’s unsurprising that Freshness is so important as ....
• 88% believe fresh food tastes better *
• 87% believe fresh food is healthier

Technomic 2018*

Order of importance when selecting food and/or drink products (1 being very important / 6 being not important at all)
Welsh for Naturalness

Very similar views of GB and Welsh offer
However, Welsh food and Drink is seen as more **Natural** than GB.
People in Wales see Welsh Food and Drink as Better Quality, Fresher, and more Natural than GB.

Which of the following words would you associate with food and drink from...
What products are associated with Wales?

Outside of Wales, Lamb is strongly associated with being from Wales. Inside Wales: Lamb, Milk and Eggs score highly.
Value of Welshness
Inside Wales Retail
Welsh shoppers do buy Welsh products

78% of shoppers say they regularly buy Welsh products

- Milk: 67%
- Lamb: 36%
- Cheese: 36%
- Eggs: 34%
- Vegetables: 31%
- Beef: 27%
- Meat: 24%
- Butter: 19%
- Fruit: 11%
- Bread: 10%
- Potatoes: 9%
- Yogurts: 9%
- Sausages: 5%
- Chicken: 5%
- Welsh Cakes: 4%
- Other: 17%

Street survey 318 shoppers

Thinking about both your main shop and your ‘top up’ shopping, do you normally buy items that have been ‘produced’ in Wales?
What Welsh shoppers believe

Almost 9 out of 10 Welsh Shoppers would always buy Welsh products if the price was the same

Wales is known for great tasting food and drink - 80%
Wales is known for good quality food and drink - 85%
I’d always buy Welsh if the price was the same - 87%

We’d like to know just a little about what you think about Welsh food and drink products. I’m going to read a few statements, and could you tell us to what extent do you agree with them? Those who agree or strongly agree.
Given a choice for the right priced products, Welsh shoppers would always choose Welsh, and sometimes pay more.

I'd always buy Welsh food and drink if the price was right

I would pay more for Welsh produced food and drink

To what extent do you agree with the following statements? Net Positive Score
Why buy Welsh?

- Support Welsh producers
- Good quality
- Fresher
- Trust more than GB food and drink

To what extent do you agree with the following statements? Net Positive Score

- Buying Welsh produced food and drink means it's likely to be fresher
- Wales is known for producing good quality food and drink
- I trust Welsh produced food and drink more than general British Food
- I would like to support Welsh food and drink producers
More than 8 out of 10 shoppers think it is important that Welsh products are available to buy.

Why?

78% want to support the Welsh Economy

How important is it to you that you can buy items produced in Wales?

Street survey of 318 shoppers
Limited range/ Unclear labelling is a key reason why shoppers don’t buy more Welsh products.

[IF No] Is there any reason why you do not typically buy items produced in Wales?

- Limited range / Labelling isn’t clear
- More interested in price/ taste/ quality
- Too expensive
- Loyal to certain brands
- I’m not from Wales
- As long as it’s British

Street survey 318 shoppers
Opportunity Gap for Retailers

And it’s the big produce categories that shoppers want most...

Over 20% + of Welsh shoppers say that the Welsh products they want to buy are not available.

- 21% of Main store shoppers
- 25% of Top up shoppers

Are the Welsh products that you would want to buy typically available in your main weekly shop? Your top up shop store?

Street survey 318 shoppers
Opportunity for Welsh Brands

70% of Welsh shoppers would like to see more Welsh brands in shops

I would like to have more Welsh Food and Drink brands in my shops

I can easily find Welsh Food and Drink where I shop

To what extent do you agree with the following statements? Net Positive Score
Clear Preference for Welsh

Given a choice Welsh shoppers would prefer to buy Welsh products

- Over ¾ of shoppers would prefer to buy Welsh in all these key categories

For each of the following which would you prefer to buy in the supermarket? (excluding those reporting 'None')

- Milk: 88%
- Lamb: 86%
- Water: 77%
- Cheese: 77%
- Butter: 76%
Clear Preference for Welsh

• More than ½ of shoppers would prefer to buy Welsh in all these categories

For each of the following which would you prefer to buy in the supermarket? (excluding those reporting 'None')
Given a choice shoppers would prefer to buy Welsh products

- Excluding any form of “brand bias” given a choice, Welsh shoppers would just prefer to buy Welsh products

For each of the following which would you prefer to buy in the supermarket? (excluding those reporting 'None')

- Milk: 88%
- Lamb: 86%
- Bottled water: 77%
- Cheddar cheese: 77%
- Butter: 76%
- Cauliflower: 69%
- Chicken: 59%
- Pies: 53%
Value of Welshness
Inside Wales Foodservice
Demand for Welsh out of home

When eating out, many Welsh consumers believe it is very important to have Welsh produce on the menu.

How important is it that there are Welsh products used in the food and drink you buy from them?

- Restaurants:
  - Very important: 36%
  - Important: 62%
  - Fairly important: 20%

- Fast food outlets:
  - Very important: 49%

Street survey 318 shoppers
Why is this important?

1. Supports the Welsh Economy (79%)
2. Reduces Food Miles
3. Better Quality

How important is it that there are Welsh products used in the food and drink you buy from them?

Street survey 318 shoppers
15% of Welsh consumers **who don’t eat out** say they would be more likely to eat out if there was more Welsh produce on menus.
Value of Welshness
Outside Wales
Views of Welsh and GB food similar…

....but Wales more Natural and GB Trusted

Overall view of GB and Welsh produce

- Traditional: Wales 65%, GB 65%
- Great Quality: Wales 58%, GB 62%
- Fresh: Wales 56%, GB 58%
- Natural: Wales 33%, GB 43%
- Trustworthy: Wales 39%, GB 53%
- Provenance: Wales 19%, GB 19%
- Expensive: Wales 14%, GB 17%
- Specialist: Wales 10%, GB 12%
- Bland: Wales 4%, GB 6%
GB shoppers choosing Welsh Lamb

Nearly half of GB shoppers would choose Welsh over GB lamb

For each of the following which would you prefer to buy in the supermarket? (excluding those reporting 'None')

- British Lamb: 46%
- Welsh Lamb: 47%
- None: 7%
Given a choice a significant proportion of shoppers outside Wales would prefer to buy Welsh products in these categories.

For each of the following which would you prefer to buy in the supermarket? (excluding those reporting 'None')

- Butter
  - 22%

- Cheese
  - 18%

- Water
  - 17%
A smaller proportion of shoppers outside Wales want Welsh products in these categories.

For each of the following which would you prefer to buy in the supermarket? (excluding those reporting 'None')

- Pies: 11%
- Cauliflower: 10%
- Chicken: 8%
- Milk: 7%
Wales Produces Good Food and Drink

Shoppers outside of Wales believe that Wales produces good food and drink and like to support Welsh producers.

- Buying Welsh produced food and drink means it is likely to be fresher
- Wales is known for producing good quality food and drink
- I trust Welsh produced food and drink more than general British Food
- I would like to support Welsh food and drink producers

To what extent do you agree with the following statements? Net Positive Score
People won’t pay more for Welsh

Outside of Wales shoppers would happily buy Welsh products but they won’t in general pay more for them.

To what extent do you agree with the following statements? Net Positive Score
People would like to see more Welsh Brands

Outside of Wales shoppers find it difficult to find Welsh Brands, but they would like access to more.

Outside of Wales - Net Positive Score

I would like to have more Welsh Food and Drink brands in my shops

I can easily find Welsh Food and Drink where I shop

To what extent do you agree with the following statements? Net Positive Score
Value of Welshness

Welsh Brand Research
Value of Welsh Brands

Welsh brands with Welsh names

Welsh Brands with non Welsh names
Value of Welsh Brands

Top 5 reasons shoppers like their chosen/recognised brand for Welsh Shoppers

Welsh brands with Welsh names

- Great quality: 92%
- Like that it’s produced in Wales: 90%
- Fantastic tasting products: 88%
- Like its strong Welsh Image: 85%
- I like that it feels really...: 81%
- Like that it has a Welsh...: 77%
- I trust it more because it...: 71%
- Great value for money: 69%
- Products are fresher: 65%

Welsh Brands with non Welsh names

- Great quality: 93%
- Fantastic tasting products: 91%
- Like that it’s produced in Wales: 88%
- Like its strong Welsh Image: 78%
- Great value for money: 75%
- Products are fresher: 74%
- I like that it feels really...: 74%
- I trust it more because it...: 68%

Which of the following describes your view of X brand – Shoppers who correctly identified the brand
Value of Welsh Brands

Top 5 reasons shoppers like their chosen/recognised brand for Shoppers outside of Wales

Welsh brands with Welsh names

- Great quality: 67%
- Like that its produced in Wales: 65%
- Fantastic tasting products: 56%
- Like that it feels really Welsh: 55%
- I like that it has a Welsh name: 59%
- I trust it more because it is produced in Wales: 19%
- Great value for money: 39%
- Products are fresher: 35%

Welsh Brands with non Welsh names

- Great quality: 73%
- Fantastic tasting products: 71%
- Like that its produced in Wales: 48%
- Like that it feels really Welsh image: 32%
- Great value for money: 37%
- Products are fresher: 38%
- I like that it feels really natural: 58%
- I trust it more because it is produced in Wales: 14%

Which of the following describes your view of X brand – Shoppers who correctly identified the brands
Value of Welshness

Welsh Brand Research
Shoppers, from GB and Wales think Welsh products should be made in Wales with the main ingredients from Wales.

If you buy a Welsh product do you expect it to be...

- Made in Wales
- Main ingredients are from Wales
- Made in Wales and the main ingredients are from Wales
Value of Welshness
Case Studies
Value of Welsh Brands

Fueling Brand growth through provenance

![Retail Sales growth (£M)]

- 25% growth Year on year (2012-2016)
- No.1 Premium Sausage Brand in Wales
- No.1 Premium Burger and Brand in Wales
- Staff numbers grown from 15 to 41 (2012-2016)
Value of Welsh Brands

Delivering Business and Category growth through provenance

- 20% overall Category growth YOY in JS when Welsh grown and packed produce introduced
- Puffin Produce grown from £8M to £20M+ business (2011-2016)
- Staff numbers grown from 55 to 140 (2011-2016)
Value of Welshness

Summary
Key Messages on the Value of Welshness

• Shopper Hierarchy: freshness, price and quality. Brand, provenance and appearance are next equal in importance

• Welshness is important to Welsh shoppers: 8/10 want more, some will pay more.

• Outside Wales, Welshness means more natural

• Half of GB shoppers would choose Welsh Lamb

• GB shoppers happy to buy Welsh, but not to pay more