'Future of Chocolate' Survey
11th to 22nd September 2015

Opinion Leader Research for Divine Chocolate Ltd

Question by Question Report
by Andrew Darnton at AD Research & Analysis

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Methodology

This report presents the results from a nationally representative survey of 1,003 members of the UK public, undertaken by Opinion Leader Research using their online panel, between 11th and 22nd September 2015. The survey was co-ordinated by Andrew Darnton, fieldwork and analysis was managed by Jane Buswell for Opinion Leader Research, and the questionnaire was drafted by them both in collaboration with Charlotte Green, Charlotte Borger and Sophi Tranchell at Divine Chocolate.

Objectives

The survey was designed to gather data from the UK public concerning their knowledge and understanding about chocolate, their awareness of a possible 'cocoa crisis', and their willingness to take action to avert that crisis (including potentially buying Divine).

The survey findings were required to feed into Divine's PR activity around Chocolate Week (12th to 18th October 2015). Further analysis could then support PR around Fairtrade Fortnight (22nd February to 7th March 2016). Other uses for the data were also envisaged, such as in negotiations with retailers, and in strategic planning; for this reason, questions profiling the public by their chocolate purchasing preferences, and their supermarket/shopping habits, were also included.

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Summary of Findings

Sources of Information

TV was dominant among respondents' news sources, used by 80%, nearly twice as many as the next most used source, radio (among 46%). Newspapers were the third most used source, interestingly equally popular in hardcopy (used by 41%) and electronically (also among 41%). Facebook notably comes in fifth among all news sources, used by one third of respondents (33%); Twitter is used as a news source by roughly half that number (16%).

In terms of regular use of written news sources, BBC News was the most popular, read regularly by 41% of respondents (presumably all electronically). Of the newspapers, the Daily Mail/Mail on Sunday was most popular (31%), ahead of local papers (25%), and the Sun (19%) – again it is not clear what proportion of this use was online.

Shopping Habits

Supermarket shopping – in store – still dominates regular food shopping patterns: 91% report shopping at a supermarket each week. By contrast only a quarter (25%) of respondents do their food shopping from a supermarket online each week. 46% of weekly food shopping occurs in local shops, with 28% shopping at local chains, and 18% at local independent shops. Just over a tenth (12%) report using markets including farmers' markets for their weekly food shopping.

By both measures – 'any' use and 'most often' use – Tesco is the number one supermarket among respondents, used for food shopping any time by nearly two thirds (63%) of respondents, and as the 'most often' used supermarket by nearly one third (31%). Meanwhile ASDA is the next most popular supermarket 'most often' used for food shopping, among 18% of respondents, and pipping Sainsbury's (although the latter comes third in terms of 'any' use). It is striking that the 'Big 4' supermarkets remain the top 4 in this sample, and on both measures. The discounters come fifth and sixth, and are neck and neck in terms of use, with Aldi used by 29% anytime, and being the 'most often' used among 7%, ahead of Lidl (on 27% anytime, and 5% 'most often'). In terms of the 'most often' used supermarket for food shopping, Waitrose comes seventh, cited by 3% - although in terms of 'any use' it is tenth, pipped by Iceland M&S and the Co-op. In terms of 'most often' used supermarkets, there are notably few significant variations by subgroup in this sample.

Looking at the relative importance of factors influencing food purchasing choices, taste, quality, and price are the three most important for this sample. There is then a cluster of factors broadly relating to health, ahead of a cluster relating to ethical issues (including seasonal, local, environmental and fairtrade). Two further consumer-facing attributes, convenience and brand, are interspersed between these health and ethical factors.

Food Attitudes

Respondents were presented with seven attitude statements about different aspects of the food system, and their role as consumers. On balance, respondents agreed with all seven, even though some were 'positive' and some 'negative' in tone. The one exceptional statement was that on eating meat being bad for the environment, which was the only one on balance disagreed with by the sample: 50% of whom disagreed overall ('strongly' or 'somewhat') while only 20%

agreed overall (27% answered neither/nor). The next least agreed statement – 'I typically don't worry about where my food is grown or raised' – was overall agreed with by 38% and disagreed with by 35%. There are also hints of contradictions in these responses, with 35% agreeing overall that they 'can influence the types of food available where I shop' (and 30% overall disagreeing), while 47% agree overall that 'consumers have little influence over how food is produced' (with 23% overall disagreeing) – although these answers also reflect respondents' sense that it is easier to influence retailers than producers.

Respondents were then presented with a list of foods and drinks – including chocolate – and asked to rank them in terms of how hard they would be to live without. Overall, men and women ranked the foods and drinks similarly; in terms of specific differences between the genders, more men are attached to potatoes, beef, sugar and beer than women. Meanwhile more women are attached to cheese, chocolate, pasta and wine. Across the whole sample, chocolate appears as the seventh most-commonly identified food as hard to live without, after bread and milk, tea and coffee, potatoes and cheese (and beef, for men).

Fairtrade

42% agreed overall it was worth paying more for fairtrade, which is higher than the 34% who agreed it was worth paying more for local or organic food. Looking at the 'fairtrade' question in terms of variation by subgroup, it is notable that under 35s and those in AB socio-economic grades were more likely than average to agree with this statement overall (49% and 48% respectively, vs. 42% overall).

It is notable that respondents in DE SEGs were much less likely than average to rate fairtrade as 'most important' as a purchasing criterion (9%, against 16% of C1C2s), while households with children were much more likely to rate it 'most important' than those without children (19% vs. 12%) – this seems a key variable, even more so than simply age (eg. over 55s also rate fairtrade 'most important' at slightly above average levels: 15% saying so).

Chocolate Eating

49% of respondents reported eating chocolate very frequently (ie. at least once a week), 39% frequently (at least once a month), and 10% infrequently (ie. less than once a month). There were few significant variations by gender, with equal proportions of men and women reporting 'very frequent' chocolate eating (49% saying so), although men were slightly more likely to report 'infrequent' chocolate eating (13% vs. 8% of women). In terms of age profile, people aged 45 and above were also more likely to report infrequent eating; 14% of 55 to 64s did so, against eg. 2% of 18 to 25s and 3% of 25 to 34s. 25 to 34s were also the most likely age group to report eating chocolate 'very frequently', 61% saying so, against 49% for the whole sample. Households with children were also nearly as likely to report 'very frequent' chocolate eating (59% vs. 45% of households without children).

Interestingly home dominates over work as a usual place to eat chocolate (80% vs. 14%), and watching TV is the most reported activity to be undertaken whilst eating chocolate (among 8%). However, this was in response to an open-ended question; if the survey had prompted respondents with these options we would expect far higher levels of agreement.

While 49% of respondents (n = 491) 'love' or 'really love' chocolate, only 11 (1%) 'don't like' or 'hate' it, and only a further 10% are neutral about it. Strong positive relationships are most common among younger respondents. Thus 41% of 18 to 24s say they 'really love it', against 25% of the whole sample, and 'loving' or 'really loving' chocolate declines steadily with age from 71% of 18 to 24s to 41% of 55 to 64s. Likewise, those in households with children are much more likely than those without to say they love/really love chocolate (59% vs. 45%). Women are also considerably more likely than men to say they love/really love it: 56% vs. 42%.

When asked unprompted what things they love about chocolate, the most numerous answers mentioned taste (among 78% of respondents to this question), while some mentioned texture (14%). Emotions appeared explicitly in 8% of respondents' answers, although other emotional effects such as feeling amazing, comforting or self-indulgent were also numerous. Many verbatims attest to the emotional and totally sensory (even sensual) experience of eating chocolate [see p20 for a longer selection]:

I love the taste. Couldn't live without it.
The texture, the taste and the fact that it gives you a feeling that you are in love.
I love to savour the taste and appreciate the effort that has gone into making it. Chocolate is something that is special and is a treat to enjoy.
It is sweet and creamy, melts in your mouth and coats your mouth in a sticky and sweet substance that makes you feel happy.

Chocolate Purchasing

In terms of the factors influencing respondents' chocolate purchasing choices, taste was overwhelmingly the most important criterion. However, the responses also resemble the earlier question (Q5) about factors in food purchasing decisions generally – hence taste, quality and price dominate. In terms of variation by subgroup, women were more likely to mention brand and flavour than men. Note that fairtrade was a relatively minor factor in chocolate choice, ranking 9th out of 11 options, although 18 to 25s and those in AB SEG were significantly more likely to mention fairtrade as a factor in their choices (though it still ranked 9th for these subgroups). It is also notable that organic was last of the 11 factors (though this raises the question of the salience of organic chocolate).

When asked to pick out from a list the countries which produce the most cocoa, it is notable that Brazil was selected by the biggest number of respondents as a 'Top 3' producer country (by 51%), whereas in fact it does not appear in the official (ICCO) Top 5 (in 2012-13 it ranked seventh). Meanwhile Ivory Coast only appeared as the fifth most selected country, whereas it is the biggest producer by far (nearly double the volume of cocoa of the next biggest producer, Ghana). Indonesia, which is in fact the third biggest producer, was only the tenth most selected country by the survey respondents – and selected by as many respondents (9%) as chose Belgium (a deliberately erroneous option). Looking at the responses by subgroup it is notable that those educated to degree level were significantly more likely – correctly - to identify each of Ghana, Ivory Coast and Indonesia in the Top 3 (38%, 27%, and 12%), although more of them – wrongly – still named Brazil and Ecuador in their top 3 (48% and 38% respectively). Looking at the survey responses overall, it appears respondents are much more likely to think South American countries produce more cocoa than African countries.

Cocoa Crisis

Only a fifth of respondents said they were already aware that cocoa could begin to run out in 2020. Interestingly this proportion was no higher among those educated to degree level, although younger respondents were much more likely to say they had heard this than older respondents were (eg. 34% of 18 to 24s, against 18% of 45 to 54s).

The most common answers to an open-ended question about 'how you would feel if chocolate ran out' related to people's emotional reactions (in line with the question wording about people's feelings), with one quarter feeling sad, and a further sixth feeling worse than that (eg. 'gutted'). Some respondents provided more practical responses – including how they would adapt to the absence of chocolate – while a minority were much more phlegmatic than the 'gutted' group, including some who would simply get on with life, or might even feel healthier as a result. There were also a number of sceptical respondents who questioned the whole proposition. A long list of verbatims appears under Q19 below, including some of these examples:

Gutted
DEPRESSED
I'll be lost without chocolate
CATASTROPHE
I would miss it and so would the rest of the world.
Devastated, what would pick me up after a hard day, what would i replace it with?
All those people without an income would be awful, plus it's a pleasure to eat
SAD FOR MY WIFE
Disappointed. Sorry for future generations. Would not bother me as I don't eat that much
I could live without it
I'd feel very sad - I'd cope without chocolate but it would ultimately be the farmers at the base level who would suffer…
Duck & run - it will be far worse for the world's men than banning smoking
It's not going to run out, it won't suddenly disappear out of existence, supply will be short and this will push up prices, so people will just have to eat less each to afford it.
This is nonsense to increase the price of cocoa
I WOULD EAT SOMETHING ELSE HOWEVER I SUSPECT THIS IS A LIE PUT ABOUT TO INCREASE THE PRICE. IT WILL ONLY RUN OUT IF PEOPLE STOP GROWING COCOA IT'S NOT A FOSSIL FUEL FOR GOODNESS SAKE!!!!!!!!!!!!!!1
I would eat fruit instead
No real feelings either way, it is a nice to have but would not really affect me if I couldn't have it except that I may lose a bit of weight
I'd be disappointed but we'd all be slimmer so it's a bonus really
indifferent and more healthy

Respondents were divided on the extent to which they agreed that they 'couldn't live without chocolate', with the smallest group (13%) agreeing strongly, and responses fairly evenly distributed across the other 4 categories. On balance, more respondents disagreed (43% 'strongly' or 'somewhat') than agreed (35%), and this is reflected in the mean score which is marginally on the negative side of neutral (2.8). The spread of responses suggests this question is good at dividing opinion, though it is notable that the single biggest group of respondents disagreed strongly (24%): from their perspective, the question overstates the issue (the second biggest group agreeing somewhat). Women are much more likely than men to agree strongly

(17% vs. 9%) and younger respondents are much more likely to agree strongly than are older ones (eg. 20% of 18 to 24s vs. 9% of 55 to 64s).

When offered a choice between living without chocolate or 11 other alternatives, respondents chose to keep chocolate in 8 out of 11 cases. The biggest margins for keeping chocolate came in relation to facebook, crisps, biscuits and alcohol. However, TV, smartphones, and sex were all deemed less expendable than chocolate for more respondents than felt the other way, although only TV produced a clear margin against chocolate (13 percentage points) – the relative support for 'my smartphone' (3 points) and sex (2 points) were much narrower (and not statistically significant). It is interesting that there is relatively little subgroup variation for many of these choices, including TV and sex; one exception is 'my smartphone', which was more preferred by women (51% chose it, vs. 45% of men), and younger respondents (eg. 66% of 18 to 24s, vs. 40% of 55 to 64s).

When asked directly to signal their agreement with a statement about their potential to influence the future supply of chocolate, it is striking that only 11% of respondents felt they could personally do anything to stop chocolate running out; the majority of respondents (56%) felt there was nothing they could do. This response is considerably more pessimistic than that given earlier in the survey, in the context of consumer influence on food production generally (rather than chocolate specifically). In that question (Q6.6) 34% of respondents agreed overall that they could 'influence the type of food available where I shop', while 30% overall disagreed.

The majority of respondents having reported that there is nothing they can do to guarantee a continuing supply of chocolate, they were then asked a question offering a number of suggestions for effective things they could in fact do. Nearly as many respondents as said they could do nothing went on to indicate that they would be prepared to take most of the steps suggested in this question. Cutting down how much chocolate they eat, and switching to certified brands, are both acceptable to 40% or more of respondents, while a third say they would even be prepared to pay more. Looking at variation by subgroup, the main difference in responses is by gender: women are more prepared than men to switch to certified brands (46% vs. 34%), to pay more (35% vs. 28%), and buy smaller bars (33% vs. 24%). However it is notable that women are slightly less prepared to cut down how often they eat chocolate than men are (41% vs. 44%).

Respondents responded positively to a list of possible actions for retailers and producers set out in the next question: four of the options were endorsed by the majority of respondents. These majority options all related to direct measures by producers and retailers to support cocoa farmers, the most popular being to pay them more for their cocoa: supported by two thirds of respondents (67%; including 72% of women, and 75% of those in DE SEGs). Less popular measures include charging consumers more – supported only by one third of respondents (33%; but rising to 40% among 18 to 24 year olds) – but also changes to ownership models, giving farmers a greater share of profits, and a voice in governance. It is not clear why these options around ownership should only appeal to a minority of respondents: we may speculate that it is because most respondents do not appreciate the potential significance of such changes, or their potential impact on farmers' livelihoods.

In keeping with responses to the previous questions, the most popular attribute of a chocolate company among respondents was that it should pay a fair wage to cocoa farmers. The second most popular attribute was that it should invest in a sustainable cocoa system. As in Q25 above,

ownership options were less prioritised, including fairtrade certification, although this was more popular among younger respondents (eg. a mean score of 3.43 among 18 to 24 year olds, for whom it was the second most popular attribute, vs. 2.79 among 45 to 54s). The least chosen option by a considerable margin was that chocolate companies should be owned by global corporations.

Chocolate Brands

In terms of both awareness and regular consumption, Cadbury's Dairy Milk, Galaxy and KitKat were the top three chocolate brands among these respondents – although the awareness and regular consumption rankings varied. In terms of awareness, the top 5 brands enjoyed near total awareness (above 90%), while the sixth and seventh (Green & Black's and Milka) were still familiar to over two thirds of respondents. There was then a big gap to Divine, of which a quarter of respondents (24%) were aware. In terms of regular consumption, CDM was far ahead of the rest, regularly eaten by over a half of respondents (58%); Galaxy and KitKat were the next most eaten, both by over a third (39%). There was then a gap to Lindt (21%), Toblerone (16%) and Green & Black's (14%). Milka (8%) then came ahead of Divine on 3% - one quarter of the proportion regularly eating Green & Black's. In terms of variation by subgroup, almost all brands were significantly more likely to be eaten regularly by those in households with children than those without. Similarly, all brands were more likely to be eaten regularly by those in AB SEGs, except for the top 3 brands where there was no significant variation by SEG – hence it can be said that Cadbury's Dairy Milk, Galaxy and KitKat are truly mainstream brands.

Only minorities of respondents could identify any of the listed brands as fairtrade – although they were on balance correct in the top 4 which they identified as fairtrade (these were the only fairtrade brands listed). Interestingly Green & Black's was the most commonly identified as fairtrade (by 42% of respondents), ahead of Cadbury's Dairy Milk (by 23%), despite CDM being by far the most widely eaten of these brands: although 58% of respondents eat it regularly, only 23% know it is fairtrade certified. KitKat includes fairly traded cocoa although it is not certified by the Fairtrade Foundation; nonetheless 13% of respondents identified it as fairtrade certified. Finally, Divine was identified as fairtrade certified by 12% of respondents – although it is only regularly eaten by 3%. Women and respondents in AB SEGs were far more likely than others to identify Divine as fairtrade (17% of women vs. 6% of men; 16% of ABs vs. 7% of DEs).

When asked about the ownership of the listed chocolate brands, respondents were again broadly correct in that the most identified brands were those which are owned by multinationals. They were also correct in that Divine, Montezuma's, and Seed and Bean were the three least identified as owned by multinationals, and none of these are. However, it was only the three most eaten brands which were identified by a majority of respondents as owned by multinationals: KitKat, Galaxy and Cadbury's Dairy Milk. Toblerone and Milka were less readily identified – by 47% and 24% respectively – and may still be more associated with Suchard (then amalgamated into Kraft Jacobs Suchard, then KGF, now named Mondelez). Lindt is in fact independently owned, although 23% (nearly as many as Milka) thought it was owned by a multinational. Green & Black's was the most incorrectly identified brand, with only 12% identifying it as owned by a multinational (it was bought by Cadbury's in 2005, which in turn was bought by KGF now Mondelez). Male respondents, and those in AB SEGs, were marginally more likely than average correctly to identify Green & Black's as owned by a multinational (both among 15%, vs. 12% of all).

Trying Divine in future

When those respondents who had answered that they were not previously aware of Divine (at Q29A) were presented with a statement explaining the fairtrade status, ownership model, ingredients and product range of Divine chocolate, two thirds said that they would be likely to try Divine in future (27% 'very likely' and 38% 'quite likely'). Only 7% said they would be on balance unlikely to try Divine. Women said they were slightly more likely to try it than were men (68% vs. 61%), and likelihood to try Divine decreased steadily with rising age (eg. from 72% of 18 to 24s to 56% of 55 to 64s).

Question by Question Results

S1 Gender

Base	1004
Male	490
	49%
Female	514
	51%

S2 Age

Base	1004
Less than 18	0
	0%
18-24 (21)	122
	12%
25-34 (30)	164
	16%
35-44 (40)	173
	17%
45-54 (50)	181
	18%
55-64 (60)	152
	15%
65 and over (70)	212
	21%
Mean	46.89

S3 Region

Base	1004
North East	53
	5%
North West	109
	11%
Yorkshire and The Humber	89
	9%
East Midlands	77
	8%
West Midlands	86
	9%
East	44
	4%
London	128
	13%

South East	178
	18%
South West	91
	9%
Wales	49
	5%
Scotland	88
	9%
Northern Ireland	11
	1%
Don't know	1
	*%

The distribution of respondents was in line with UK population patterns; 85% of respondents lived in England [vs 84%, in ONS Population Statistics, November 2015].

S4 Current occupation

Base	1003
Higher Management / Professional / Administrative eg. Established Doctor, Solicitor, Board Director In A Large Organisation (200 Plus Employees), Top Level Civil Servant, Public Service Employee, Headmaster / Mistress etc.	47
	5%
Intermediate managerial / Professional / Administrative eg. Newly Qualified Doctor (Under 3 Years), Solicitor, Board Director in a small organisation, middle manager in a large organisation, principal officer in civil service, local government etc.	222
	22%
Supervisor or clerical / junior managerial / Professional Administrator eg. Office worker, Student Doctor, Foreman with 25+ employees, Sales Person, Student Teacher etc.	293
	29%
Skilled Manual Worker eg. Brick Layer, Carpenter, Plumber, Painter, Bus / Ambulance Driver, HGV Driver, Unqualified Assistant Teacher, AA Patrol Man etc.	198
	20%
Semi or Unskilled Manual Worker eg. Have no special training or qualification: Apprentice, Caretaker, Cleaner, Nursery School Assistant, non-HGV Driver, Shop Assistant etc.	142
	14%
Unemployed (over 6 months) or Not working Due To Long Term Sickness	26
	3%
Full Time Student	44
	4%
Retired and Living on a State Pension	31
	3%

Respondents' reported occupations were coded into socio-economic grades, as below. ABC1s were slightly over-represented in the sample (56%), relative to national proportions (50%).

SEG - Occupation segment

Base	1003
A	47

	5%
B	222
	22%
C1	293
	29%
C2	198
	20%
D	142
	14%
E	101
	10%

Q1 Ways to find out the latest news

Base	1003
TV	800
	80%
Radio	464
	46%
Hard copy newspapers	412
	41%
Online newspapers	411
	41%
Facebook	334
	33%
Magazines / Publications	161
	16%
Twitter	157
	16%
Online forums	108
	11%
Podcasts	32
	3%
Other	66
	7%
None of these	25
	2%

TV dominated among respondents' news sources, used by 80%, nearly twice as many as the next most used source, radio (among 46%). Newspapers were the third most used source, interestingly equally popular in hardcopy (used by 41%) and electronically (also among 41%): the overlap between these two categories is not known. Facebook notably comes in fifth among all news sources, used by one third of respondents (33%); Twitter is used as a news source by roughly half that number (16%).

Q2 Which of these do you read regularly, either online or as a hard copy?

Base	1003
BBC News	408
	41%
Daily Mail / Mail on Sunday	307
	31%
Local Newspaper	255
	25%
The Sun	195
	19%
The Times / The Sunday Times	133
	13%
The Telegraph / The Sunday Telegraph	124
	12%
The Guardian	123
	12%
The Mirror / Sunday Mirror	122
	12%
Daily Express	87
	9%
The Independent / The Independent on Sunday	79
	8%
The Observer	54
	5%
Financial Times	54
	5%
Daily Star	42
	4%
Other	89
	9%
None of these	173
	17%

In terms of regular use of written news sources, BBC News was the most popular, read regularly by 41% of respondents (presumably all electronically). Of the newspapers, the Daily Mail/Mail on Sunday was most popular (31%), ahead of local papers (25%), and the Sun (19%) – again it is not clear what proportion of this use was online.

Q3 In an average week which of the following places do you go to for your food shopping?

Base	1003
Supermarket - In store	911
	91%
Local convenience store - part of a chain eg. (Spar)	282
	28%
Supermarket - Online	250
	25%
Local convenience store - independent	179
	18%
Market eg. farmers market	124
	12%
Health / delicatessen / Farm shops	92
	9%
Other	17
	2%
None of these	16
	2%

It is notable that supermarket shopping – in store – still dominates regular food shopping patterns: 91% shop at a supermarket each week. By contrast only a quarter (25%) of respondents do their food shopping from a supermarket online each week. 46% of weekly food shopping occurs in local shops, with 28% shopping at local chains, and 18% at local independent shops. Just over a tenth (12%) report using markets including farmers' markets for their weekly food shopping.

In terms of variation by subgroup, it is notable that younger respondents tended to report shopping online from supermarkets more commonly than older ones (eg. 42% of 25 to 34s, vs. 17% of 55 to 64s) and also to use local convenience stores, especially independent ones (eg. 25% of 25 to 34s, vs. 17% of 55 to 64s). Use of markets including farmers markets showed a class gradient, decreasing from 15% of ABs to 9% of DEs.

Q4A Which supermarkets do you typically use to do your food shopping; this could be either online or in store?

Q4B And which one of these do you use most often [pick one only]

Q4A - Base	1003	Q4B - Base	1003
Tesco	628	Tesco	311
	63%		31%
Sainsbury's	459	Asda	179
	46%		18%
Asda	411	Sainsbury's	149
	41%		15%
Morrisons	330	Morrisons	131
	33%		13%
Aldi	291	Aldi	75
	29%		7%
Lidl	275	Lidl	48

	27%		5%
Iceland	251	Waitrose	32
	25%		3%
Marks & Spencer	211	Co-operative	32
	21%		3%
Co-operative	209	Iceland	16
	21%		2%
Waitrose	121	Marks & Spencer	15
	12%		1%
Ocado	33	Ocado	9
	3%		1%
Booths	22	Booths	1
	2%		*%
Budgens	15	Budgens	0
	1%		0%
Other	24	Other	1
	2%		*%
None of these	4	None of these	4
	*%		*%

By both measures – 'any' use and 'most often' use – Tesco was the number one supermarket among respondents, used for food shopping any time by nearly two thirds (63%) of respondents, and as the 'most often' used supermarket by nearly one third (31%). Meanwhile ASDA was the next most popular supermarket 'most often' used for food shopping, among 18% of respondents, and pipping Sainsbury's (although the latter comes third in terms of 'any' use). It is striking that the 'Big 4' supermarkets remain the top 4 in this sample, and on both measures. The discounters come fifth and sixth, and are neck and neck in terms of use, with Aldi used by 29% anytime, and being the 'most often' used among 7%, ahead of Lidl (on 27% anytime, and 5% 'most often'). In terms of the 'most often' used supermarket for food shopping, Waitrose comes seventh, cited by 3% - although in terms of 'any use' it is tenth, pipped by Iceland M&S and the Co-op.

In terms of 'most often' used supermarkets, there are notably few significant variations by subgroup in this sample, although Tesco appears to be chosen at above average rates by 45 to 54 year olds (37% vs. 31% of all) and DEs (35% vs. 31%). Choosing ASDA as the main food supermarket declines with age, from 28% of 18 to 24s to 13% of 45 to 54s; those with children are far more likely to do so (24%) than those without (15%). Meanwhile choosing Waitrose appears not to vary with age, although those in AB SEG are twice as likely to do so as those in C or DE SEGs (6%, vs 2% and 3% respectively).

Q5 - Top 5 most important factors when food shopping

Thinking about the individual grocery products that you buy; from the list below please rate the importance of the following factors when shopping for food, where 1 is the least important and 5 is the most important.

Q5.1 Importance of factors when food shopping – Taste
Q5.2 Importance of factors when food shopping – Quality
Q5.3 Importance of factors when food shopping – Price
Q5.4 Importance of factors when food shopping - Food safety
Q5.5 Importance of factors when food shopping - Ingredients /Food Allergies
Q5.6 Importance of factors when food shopping - Health /Nutrition content
Q5.7 Importance of factors when food shopping – Convenience
Q5.8 Importance of factors when food shopping - Animal Welfare
Q5.9 Importance of factors when food shopping - Locally produced
Q5.10 Importance of factors when food shopping - Buying foods in season
Q5.11 Importance of factors when food shopping – Fairtrade
Q5.12 Importance of factors when food shopping - Environmental impact
Q5.13 Importance of factors when food shopping – Brand

Q5 Importance of factors when food shopping - Summary Table

	Taste	Quality	Price	Food safety	Ingredients /Food Allergies	Health /Nutrition content	Convenience	Animal Welfare	Locally produced	Buying foods in season	Fairtrade	Environmental impact	Brand
Base	1003	1003	1003	1003	1003	1003	1003	1003	1003	1003	1003	1003	1003
5 - Most important (5)	545	560	449	424	194	252	180	207	149	173	140	155	127
	54%	56%	45%	42%	19%	25%	18%	21%	15%	17%	14%	15%	13%
4 (4)	345	311	326	285	236	307	236	208	191	210	184	178	180
	34%	31%	33%	28%	24%	31%	24%	21%	19%	21%	18%	18%	18%
3 (3)	92	105	160	176	209	230	251	199	237	217	212	218	229
	9%	10%	16%	18%	21%	23%	25%	20%	24%	22%	21%	22%	23%
2 (2)	16	19	46	71	154	117	148	172	191	185	199	212	187
	2%	2%	5%	7%	15%	12%	15%	17%	19%	18%	20%	21%	19%
1 - Least important (1)	3	5	19	33	184	82	163	177	200	187	223	198	230
	*%	*%	2%	3%	18%	8%	16%	18%	20%	19%	22%	20%	23%
Don't know	2	3	3	14	26	15	25	40	35	31	45	42	50
	*%	*%	*%	1%	3%	1%	2%	4%	3%	3%	4%	4%	5%
NET important	890	871	775	709	430	559	416	415	340	383	324	333	307
	89%	87%	77%	71%	43%	56%	41%	41%	34%	38%	32%	33%	31%
NET unimportant	19	24	65	104	338	199	311	349	391	372	422	410	417
	2%	2%	6%	10%	34%	20%	31%	35%	39%	37%	42%	41%	42%
Mean score	4.41	4.4	4.14	4.01	3.1	3.54	3.12	3.1	2.89	3	2.81	2.88	2.78

Q5 Importance of factors when food shopping – Summary of Mean Scores
(where 5 = Most Important)

1.	Taste	4.41
2.	Quality	4.40
3.	Price	4.14
4.	Food Safety	4.01
5.	Health /Nutrition content	3.54
6.	Convenience	3.12
7.	Ingredients /Food Allergies	3.10
8.	Animal Welfare	3.10
9.	Buying foods in season	3.00
10.	Locally produced	2.89
11.	Environmental impact	2.88
12.	Fairtrade	2.81
13.	Brand	2.78

Looking at the relative importance of factors influencing food purchasing choices, taste quality and price are the three most important for this sample. There is then a cluster of factors broadly relating to health, ahead of a cluster relating to ethical issues (including seasonal, local, environmental and fairtrade). Two further consumer-facing attributes, convenience and brand, are interspersed between these health and ethical factors. It is notable that brand is the lowest ranked factor, when it is often considered an indicator of quality (which itself was ranked second); it may be the respondents in this sample sought to emphasise that they do not buy 'blindly' on brand, regardless of the quality and other attributes of the food product in question.

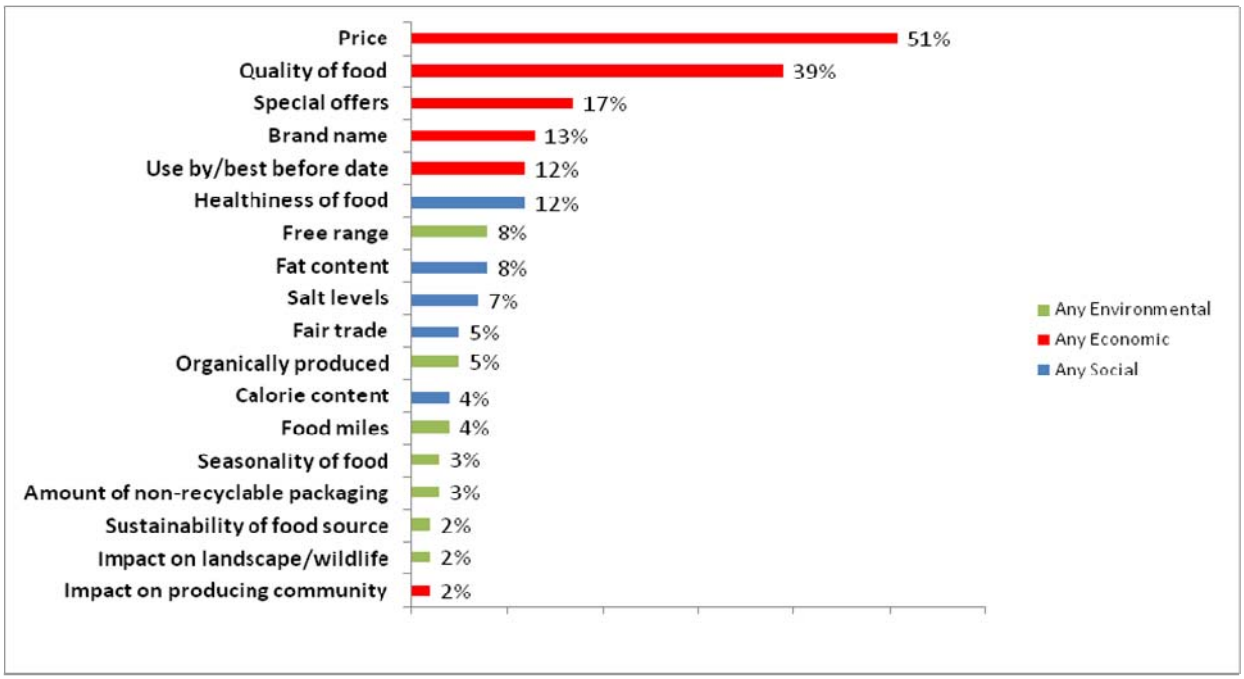
This general ranking is in line with the results to comparable questions in other surveys. For example, a 2013 survey commissioned by the retail consultancy IGD provided respondents with a pre-coded list of factors influencing their shopping choices, and similarly found that price and quality outstripped health concerns, with ethical considerations coming at the bottom of shoppers' priorities (see table below, from IGD 2013: '*Sustainable Diets - Helping Shoppers. IGD Shopper Vista*').

Q. Rank your five most important considerations when shopping. Please think about the individual food and grocery products that you buy.

Price	91%
Promotions	68%
Quality or performance	63%
Taste or smell	53%
Healthy option	49%
Use by or sell by date	47%
Familiarity	46%
Brand	35%
Ease of use	20%
Ethical or eco-friendly	19%

Similarly a quantitative survey undertaken for the Food Standards Agency in 2008 found that the top three factors in food choice spontaneously reported by the public were price, quality, and special offers (see figure below, from TNS 2008: '*Consumer priorities for sustainable development*').

When you go food/grocery shopping, what issues do you consider when choosing one food product over another? [spontaneous]



Source: TNS Omnibus 7th- 11th March 2008 Base: All principal shoppers (n = 1,418)

Returning briefly to our 'Future of Chocolate' survey, in terms of variation in responses by subgroup, women were far more likely than men to rate as 'most important' taste (60% vs. 49% of men), quality (60% vs. 52% of men), and health/nutritional attributes (30% vs. 20% of men). Unsurprisingly, price was rated 'most important' by those in the lowest SEGs, with 51% of DEs saying so, against 36% of ABs – who were also keener on buying food in season (21% of ABs rated this 'most important', against 14% of DEs). Finally it is notable that DEs were much less likely than average to rate fairtrade as 'most important' (9%, against 16% of C1C2s), while households with children were much more likely to rate it 'most important' than those without children (19% vs. 12%) – this seems a key variable, even more so than simply age (eg. over 55s also rate fairtrade most important at slightly above average levels: 15% saying so).

Q6 - Statement ratings

On a scale of 1 to 5, where 1 is "strongly disagree" and 5 is "strongly agree", to what extent, do you agree with the following statements?

Q6.1 Statement ratings - It is worth paying more for food that is fairly traded
Q6.2 Statement ratings - It is very important to know how my food is produced
Q6.3 Statement ratings - I typically don't worry about where my food is grown or raised
Q6.4 Statement ratings - I feel well-informed about the quality safety and origin of the food I eat
Q6.5 Statement ratings - Eating meat is bad for the environment
Q6.6 Statement ratings - As a consumer I can influence the types of food available where I shop
Q6.7 Statement ratings - Consumers have little influence over how food is produced

Q6 Statement ratings - Summary Table

	It is worth paying more for food that is fairly traded	It is very important to know how my food is produced	I typically don't worry about where my food is grown or raised	I feel well-informed about the quality safety and origin of the food I eat	Eating meat is bad for the environment	As a consumer I can influence the types of food available where I shop	Consumers have little influence over how food is produced
Base	1003	1003	1003	1003	1003	1003	1003
5 - Strongly agree (5)	122	163	129	105	69	104	144
	12%	16%	13%	10%	7%	10%	14%
4 - Somewhat agree (4)	295	340	251	315	132	243	325
	29%	34%	25%	31%	13%	24%	32%
3 - Neither agree nor disagree (3)	332	300	261	318	272	327	276
	33%	30%	26%	32%	27%	33%	28%
2 - Somewhat disagree (2)	124	119	200	187	216	193	153
	12%	12%	20%	19%	22%	19%	15%
1 - Strongly disagree (1)	115	66	152	69	282	112	76
	11%	7%	15%	7%	28%	11%	8%
Don't know	15	15	10	9	32	24	29
	1%	1%	1%	1%	3%	2%	3%
Mean	3.19	3.42	3.01	3.2	2.47	3.03	3.32

Q6 Statement Ratings – Summary of Mean Scores
(where 5 = Strongly Agree)

1.	It is very important to know how my food is produced	3.42
2.	Consumers have little influence over how food is produced	3.32
3.	I feel well-informed about the quality safety and origin of the food I eat	3.20
4.	It is worth paying more for food that is fairly traded	3.19
5.	As a consumer I can influence the types of food available where I shop	3.03
6.	I typically don't worry about where my food is grown or raised	3.01
7.	Eating meat is bad for the environment	2.47

In terms of mean agreement it is notable that, for these respondents, they on balance agree with all 7 statements asked here, even though some are 'positive' and some 'negative' in tone. The one exceptional statement is that on eating meat being bad for the environment, which is the only one on balance disagreed with by the sample: 50% of whom disagreed overall ('strongly' or 'somewhat') while only 20% agreed overall (27% answered neither/nor). The next least agreed statement – 'I typically don't worry about where my food is grown or raised' – was overall agreed with by 38% and disagreed with by 35%. There are also hints of contradictions in these responses, with 35% agreeing overall that they 'can influence the types of food available where I shop' (and 30% overall disagreeing), while 47% agree overall that 'consumers have little influence over how food is produced' (with 23% overall disagreeing) – although these responses also reflect respondents' sense that it is easier to influence retailers than producers.

All these statements were taken from a comparable battery of questions asked in a 2014 global survey of consumer food attitudes and behaviours, asked by GlobeScan (National Geographic / GlobeScan (2014): '*Greendex Consumer Choice and the Environment Survey- Focus on Food and Behaviour Change'*). Topline responses for all respondents in Great Britain are presented below, in terms of overall agreement scores (not mean scores, as quoted in the table above).

1.	Consumers Have Little Influence over How Food Is Produced	45%
2.	It Is Very Important to Know How My Food Is Produced	43%
3.	It is Worth Paying More for Locally or Organically Produced Foods	34%
4.	As a Consumer, I Can Influence the Types of Food Available Where I Shop	34%
5.	I Typically Don't Worry about Where My Food Is Grown or Raised	32%
6.	I Feel Well-Informed about the Quality, Safety, and Origin of Food I Eat	32%
7.	Eating Meat is Bad for the Environment	21%

Aside from a small change in the ordering of the top two statements, the one big variation is in the relative agreement with the statement 'I feel well-informed about the quality safety and origin of the food I eat': in the 'Future of Chocolate' survey this ranked third among the seven statements, though in the GlobeScan survey it was sixth. The 2015 respondents appear more confident about their knowledge of the food they eat, with 42% overall agreeing they felt well-informed, against only 32% of the GlobeScan sample.

Finally, note that the GlobeScan question on paying more for local or organic food was modified in the Future of Chocolate Survey to address fairtrade foods only. In the latter survey, 42% agreed overall it was worth paying more for fairtrade, which is higher than the 34% who agreed it was worth paying more for local or organic food – but this may reflect a greater sense of empowerment in the 'Future of Chocolate' sample, as we have seen, more than fairtrade being more attractive than local/organic per se. Looking at the 'fairtrade' question in terms of variation by subgroup, it is notable that under 35s and ABs were more likely than average to agree with this statement overall (49% and 48% respectively, vs. 42% overall)

Q7 Please rank which 3 of these foods and drinks you would find the hardest to live without?
Mean Scores (where highest = hardest to live without)

	Base	[all = 1004]	[men = 490]	[women = 514]
1.	Bread	0.87	0.97	0.77
2.	Milk	0.79	0.86	0.73
3.	Tea	0.65	0.60	0.69
4.	Coffee	0.61	0.55	0.66
5.	Potatoes	0.57	0.62	0.53
6.	Cheese	0.49	0.40	0.57
7.	Chocolate	0.41	0.34	0.48
8.	Pasta	0.35	0.22	0.47
9.	Beef	0.32	0.42	0.23
10.	Bananas	0.20	0.18	0.22
11.	Sugar	0.20	0.23	0.16
12.	Wine	0.17	0.16	0.18
13.	Beer	0.14	0.23	0.06
14.	Other	0.11	0.07	0.15

	Base	[men = 490]
1.	Bread	0.97
2.	Milk	0.86
3.	Potatoes	0.62
4.	Tea	0.60
5.	Coffee	0.55
6.	Beef	0.42
7.	Cheese	0.40
8.	Chocolate	0.34
9.	Sugar	0.23
10.	Beer	0.23
11.	Pasta	0.22
12.	Bananas	0.18
13.	Wine	0.16
14.	Other	0.07

	Base	[women = 514]
1.	Bread	0.77
2.	Milk	0.73
3.	Tea	0.69
4.	Coffee	0.66
5.	Cheese	0.57
6.	Potatoes	0.53
7.	Chocolate	0.48
8.	Pasta	0.47
9.	Beef	0.23
10.	Bananas	0.22
11.	Wine	0.18
12.	Sugar	0.16
13.	Other	0.15
14.	Beer	0.06

While both men and women rank the foods and drinks which they would find hardest to live without similarly, it is notable that men show more consistency in their answers (hence generate higher index scores – it is not the case that they would find comparable items harder to give up than would women). In terms of differences between the genders, more men are attached to potatoes, beef, sugar and beer than women. Meanwhile more women are attached to cheese, chocolate, pasta and wine. Overall, chocolate appears as the seventh most-commonly identified food as hard to live without, after bread and milk, tea and coffee, potatoes and cheese (and beef, for men).

Q8 How often do you eat chocolate

Base	1003
Several times a day	51
	5%
Once a day	169
	17%
Several times a week	274
	27%
Once a week	177
	18%
Several times a month	135
	13%
Once a month	77
	8%
A few times a year	79
	8%
Once a year	6
	1%
Less than once a year	17
	2%
Never	18
	2%

In terms of overall frequencies, 49% of respondents reported eating chocolate very frequently (ie. at least once a week), 39% frequently (at least once a month), and 10% infrequently (ie. less than once a month). There were few significant variations by gender, with both men and women reporting 'very frequent' chocolate eating at the same level (49% saying so), although men were slightly more likely to report 'infrequent' chocolate eating (13% vs. 8% of women). In terms of age profile, people aged 45 and above were also more likely to report infrequent eating; 14% of 55 to 64s did so, against eg. 2% of 18 to 25s and 3% of 25 to 34s. 25 to 34s were also the most likely age group to report eating chocolate 'very frequently', 61% saying so, against 49% for the whole sample. Households with children were also nearly as likely to report 'very frequent' chocolate eating (59% vs. 45% of households without children).

Q9 Where do you tend to eat chocolate?

Base	949
At home / in the house	758
	80%
At work	133
	14%
Watching TV	78
	8%
When travelling	55
	6%
Anywhere / anytime	51
	5%
At friends / relatives house	20

	2%
In the car	14
	1%
In Bed	10
	1%
Restaurant / coffee shop	9
	1%
In the Cinema	9
	1%
Walking	6
	1%
At computer	6
	1%
On the sofa	6
	1%
Whilst reading	5
	1%
At School	4
	*%
When shopping	4
	*%
On holiday	2
	*%
Nothing in particular	4
	*%
Don't know	3
	*%

The wide range of responses attests to this question being asked unprompted (the answers being coded together afterwards). Interestingly home dominates over work as a usual place to eat chocolate (80% vs. 14%), and watching TV is the most reported activity to be undertaken whilst eating chocolate (among 8%, though if the survey had prompted respondents with this option we would expect far higher levels of agreement).

A sense of consistency with the wider evidence on chocolate habits is provided by a press release issued by Cadbury's following a survey they undertook in 1998. That survey reported that "*one of Great Britain's top pleasures is putting our feet up and relaxing with a bar of chocolate*", while 48% said their favourite place to eat chocolate is in front of the TV.

Q10 And which one of the following statements best describes your relationship with chocolate

Base	1003
I really love it	252
	25%
I love it	239
	24%
I like it a lot	273
	27%
I quite like it	128
	13%
I don't have strong feelings either way	100
	10%
I don't like it	7
	1%
I hate it	4
	*%

While 49% of respondents (n = 491) 'love' or 'really love' chocolate, only 11 (1%) 'don't like' or 'hate' it, and only a further 10% are neutral about it. Strong positive relationships are most common among younger respondents. Thus 41% of 18 to 24s say they 'really love it', against 25% of the whole sample, and 'loving' or 'really loving' chocolate declines steadily with age from 71% of 18 to 24s to 41% of 55 to 64s. Likewise, those in households with children are much more likely than those without to say they love/really love chocolate (59% vs. 45%). Women are also considerably more likely than men to say they love/really love it: 56% vs. 42%.

Q11 And what is it that you love about chocolate?

Base (all who 'really love'/'love' chocolate)	483
The taste	379
	78%
The texture	66
	14%
Emotional impact	40
	8%
Melts in your mouth	35
	7%
Sweetness	31
	6%
Nice / lovely / delicious / amazing	27
	6%
Self indulgent	27
	6%
Everything	22
	5%
Creaminess / milky	19
	4%

Comforting	19
	4%
Different varieties / flavours	17
	4%
Addictive	13
	3%
Smoothness	11
	2%
Aroma / smell	11
	2%
Dark chocolate	8
	2%
Energy boost	7
	1%
Milk Chocolate	5
	1%
Versatility	5
	1%
Do not eat chocolate	5
	1%
Bitterness	3
	1%
Easy / quick to eat	3
	1%
Nothing in particular	2
	*%
Don't know	3
	1%
Other Answers	17
	4%

Again, this was an unprompted question (like Q9 above) hence generated a wide range of responses, which were post-coded. The most numerous answers mentioned taste (from 78% of respondents to this question), while some mentioned texture (14%). Emotions appeared explicitly in 8% of respondent's answers, although other emotional effects such as feeling amazing, comforting or self-indulgent were also numerous. Many verbatims attest to the emotional and totally sensory (even sensual) experience of eating chocolate; for example:

The sweet velvety texture in my mouth
The taste of milk chocolate and the rush you get from it.
What is there not to love??? I love everything about chocolate.
It tastes divine and makes you feel great
I love the way that chocolate melts in my mouth, and the sweet delicate taste of it especially Galaxy chocolate.I also love the fact that there is such a range of flavours and levels of richness of it .
ITS A REAL TREAT.DONT EAT THAT MUCH BUT I ENJOY IT WHEN I DO
I just love the taste, and the feeling as I eat it
I love the taste. Couldn't live without it
The texture, the taste and the fact that it gives you a feeling that you are in love
Love the happiness i get from eating it
The way it melts in the mouth, the aftertaste. Feels like it's doing me good!!
The sweet taste of chocolate. It makes me happy and refreshed
The taste and the fact it goes with many other things, I'm eating a Picnic as I'm doing this survey.

It's a comfort food, it cheers you up, it is addictive, it's lovely
The feeling of smooth love in my mouth
I love to savour the taste and appreciate the effort that has gone into making it. Chocolate is something that is special and is a treat to enjoy.
It makes you feel good... The Milkyness
Everything. The taste, the texture and the way it melts in the mouth. I like quality chocolates. I prefer a small amount of quality chocolate that I can savour rather than a lot of the cheap stuff.
It's naughty but so nice. I love how it melts in your mouth
The smooth taste and the bitter taste all together
I just love the taste of Cadbury's chocolate, I especially crave it sometimes.
I go through stages, sometimes I fancy something sweet. I love the taste, the texture and the fact that it is my freedom of choice, knowing that it is bad for me but it is my choice to eat it with the money I work hard to pay for it.
SEXY
It is sweet and creamy, melts in your mouth and coats your mouth in a sticky and sweet substance that makes you feel happy.
Everything, the flavour the texture and of course the chemical effects on the brain that choc creates, my number one comfort food and go to place for a treat I can afford anytime.
The slightly bitter taste of dark chocolate, and the smoothness of milk chocolate.
Creamy texture and taste, convenience, provides fast energy especially in cold weather when I'm out and about.

Q12 Please rank your top 5 factors when choosing chocolate for yourself

[Mean Scores: higher = higher ranking]

Base	992
Taste	3.19
Type	2.52
Quality	2.22
Price	1.93
Flavour	1.38
Brand	1.35
Size	0.64
Promotion	0.61
Fairtrade	0.37
Nutritional content	0.26
Organic	0.18

This question was open to all respondents, and asked them to rank their top 5 factors from a pre-coded list of options; in this way it provides quantitative data to complement the open-ended question above. As in the open-ended question, taste was overwhelmingly the most liked attribute. However, the responses also resemble the earlier question (Q5) about factors in food purchasing decisions generally – hence taste, quality and price dominate. It is notable that much of the emotional and sensory content which patterned respondents' open-ended answers are missing from this question, lending a more colourless feel to the data. In terms of variation by subgroup women were more likely to mention brand and flavour than men. Finally, note that fairtrade was a relatively minor factor in chocolate choice, ranking 9th out of 11 options, although 18 to 25s and those in AB SEG were significantly more likely to mention fairtrade as a factor in their choices (though it still ranked 9th for these subgroups). It is also notable that organic was last of the 11 factors (though this raises the question of the salience of organic chocolate).

Q13 Can you name any of the ingredients that go into making chocolate?

Base	1001
Cocoa	626
	63%
Milk	545
	54%
Sugar	423
	42%
Cocoa beans	128
	13%
Cocoa butter	71
	7%
Fats	61
	6%
Cocoa powder	49
	5%
Nuts	31
	3%
Cocoa solids	19
	2%
Flavouring / Natural flavouring	18
	2%
Salt	16
	2%
Chocolate	14
	1%
Cream	14
	1%
Emulsifier	12
	1%
Vanilla	12
	1%
Caramel	8
	1%
Whey powder	6
	1%
Mint / Peppermint	5
	*%
Palm oil	4
	*%
Vegetable oil	3
	*%
Nothing in particular	47
	5%
Don't know	8
	1%
Other Answers	25

	2%

This was effectively a question to test respondents' knowledge of chocolate; it was asked unprompted, hence the wide range of responses given. The majority of responses, correctly, related to cocoa (both solids and butter, and sometimes discriminated between the two) – although it is notable that only two thirds of respondents (63%) named cocoa per se (a further 13% identifying beans, and 7% butter – although there is some overlap between these respondents).

Q14 If you wanted to buy the best quality chocolate, which of the following would you look for?

Base	1003
Known brand	553
	55%
Percentage of cocoa it contains	548
	55%
Where it is made	192
	19%
It's Fairtrade	182
	18%
Origin of ingredients	179
	18%
It's organic	138
	14%
Premium packaging	134
	13%
Farmer-owned	41
	4%
Other	15
	1%
None of these	75
	7%

Again, this question was testing respondents' knowledge and it is notable that the joint top answer (among 55%) was 'percentage of cocoa' (probably the most 'correct' answer) along with 'known brand' (which could be a helpful rule of thumb – but could also mask differences in quality across a brand's range). Fairtrade was ranked fourth of the eight factors given, suggesting that the mark is associated with quality (as well as production and ownership standards). We might also infer that quality is not the main criterion respondents use when choosing which chocolate to buy – or else fairtrade would have appeared higher in the list in Q12 above (indeed, quality may be over-claimed as a criterion by some respondents to that question). Notably, older respondents were more likely than average to identify the percentage of cocoa (eg. 63% of 55 to 64s, against 55% of all), while younger respondents were more likely to identify fairtrade (eg. 28% of 18 to 24s, against 18% of all). Those educated to degree level were slightly more likely than average to indicate both (59% and 21% respectively) as might be expected in response to a knowledge-testing question.

Q15 Which three countries from this list do you think grow the most cocoa?

Base	1003
Brazil	509
	51%
Ecuador	393
	39%
Ghana	325
	32%
Venezuela	253
	25%
Ivory Coast	216
	22%
Madagascar	205
	20%
South Africa	166
	17%
Uganda	132
	13%
Belgium	93
	9%
Indonesia	91
	9%
Switzerland	74
	7%
USA	65
	6%
China	22
	2%
None of these	3
	*%

Again, this was a knowledge-testing question, using thirteen prompted options. The Top 5 countries selected by respondents appear below, next to the actual Top 5 in 2012 (the most recent year of full published data) and the Forecast Top 5 for 2014/15 [numbers taken from the ICCO Quarterly Bulletin of Cocoa Statistics].

[2015 Survey]	(Top 3)	[2012-13 Actual]	(Tonnes, 000s)	[2014-15 Forecast]	(Tonnes, 000s)
Brazil	51%	Ivory Coast	1449	Ivory Coast	1740
Ecuador	39%	Ghana	835	Ghana	696
Ghana	32%	Indonesia	410	Indonesia	370
Venezuela	25%	Nigeria	238	Ecuador	250
Ivory Coast	22%	Cameroon	225	Nigeria	235

It is notable that Brazil was selected by the majority of respondents as a 'top 3' producer country, whereas in fact it does not appear in the Top 5 (in 2012-13 it ranked seventh). Meanwhile Ivory Coast only appeared as the fifth most selected country, whereas it is the biggest producer by far (nearly double the volume of cocoa of the next biggest producer, Ghana). Indonesia, which is in fact the third biggest producer, was only the tenth most selected country by the survey respondents – and selected

by as many respondents (9%) as chose Belgium (a deliberately erroneous option). Looking at the responses by subgroup it is notable that those educated to degree level were significantly more likely – correctly - to identify each of Ghana, Ivory Coast and Indonesia in the top 3 (38%, 27%, and 12%), although more of them – wrongly – still named Brazil and Ecuador in their top 3 (48% and 38% respectively). Looking at the survey responses overall, it appears respondents are much more likely to think South American countries produce more cocoa than African countries.

Q16 Statements 'True or False' - Summary Table

	Most of the world's cocoa is grown in West Africa	Most of the world's cocoa is grown by small-scale farmers rather than large plantations	Cocoa grows in the ground	Farmers set the price for the cocoa they grow	Over 70% of chocolate sold in the UK is produced by three multi-national companies
Total	1003	1003	1003	1003	1003
True	628	655	361	218	891
	63%	65%	36%	22%	89%
False	375	348	642	785	112
	37%	35%	64%	78%	11%

Continuing the knowledge testing questions, respondents were asked five 'True or False' questions in succession. On each of the questions, the majority of respondents answered correctly: the question with the highest proportion of correct answers was about the ownership of chocolate sold on the UK market (70% from three companies) – selected by 89%. The least correctly answered statement was that on where cocoa is grown: here, nearly two thirds of respondents answered correctly that West Africa is the leading region of production, but as we have seen in the previous question (Q15) there is more than a little uncertainty here, which may be masked by the 'True of False' question format. A certain amount of guesswork is also implied by the lack of variation across subgroups: for instance, those educated to degree level tended to answer in the same way as less educated respondents, with the slight exception of the 'region of production' question, where 67% answered correctly (against 63% of the whole sample).

Q17 Which of the following do you think cocoa farmers should be able to afford from their cocoa income?

Base	1003
To feed their families	887
	88%
To send their kids to school	779
	78%
To buy medicine when they or a member of their family is sick	767
	76%
To buy farming equipment for their farms	718
	72%
To train on farming methods	553
	55%
To contribute to their community	524

	52%
Other	23
	2%

Across these prompted options, the statements about food, education, health, and working equipment were all prioritised by three quarters of respondents or more. Around a half also prioritised training for work, and providing wider community benefits. The ordering of responses thus conforms to a Maslowian view of the world, with 'basic' needs (eg. sustenance) being prioritised over less 'essential' ones (eg. learning): though it is notable that formal education is rated fractionally higher than treatment for ill health.

A few respondents provided additional comments, including:

All of the above
They should be able to afford them all but I don't think they actually can afford them
To stay in their country of origin
To reinvest in their production techniques
To have good income from their produce so they can have a good standard of living
Everything that other people can afford
To have a decent home, to have easy access to clean water and to have hygienic sanitation.
To be able to sustain cocoa production
To enjoy an independent and comfortable future

Q18 Experts have said that chocolate could start to run out from 2020, because of a predicted shortage of cocoa. Have you heard about this?

Base	1003
Yes	201
	20%
No	763
	76%
Can't remember	39
	4%

Only a fifth of respondents said they were already aware that cocoa could begin to run out in 2020. Interestingly this proportion was no higher among those educated to degree level, although younger respondents were much more likely to say they had heard this than older respondents were (eg. 34% of 18 to 24s, against 18% of 45 to 54s).

Q19 How you would feel if chocolate ran out?

Base	990
Sad / unhappy / depressed	251
	25%
Devastated / gutted / upset	164
	17%
Not bothered	161
	16%
I would survive / be okay / not the end of the world / can live without it	89
	9%
Bad	76
	8%
Disappointed	66
	7%
I would miss it	37
	4%
Okay	35
	4%
Bad for the farmers	33
	3%
I would move on to other treats	33
	3%
Manufacturer / scientists will come up with an alternative	30
	3%
Healthier	27
	3%
Worried	20
	2%
It would be a shame	18
	2%
Annoyed / angry	16

	2%
Fatalistic	15
	2%
Happy / good	13
	1%
Nothing in particular	16
	2%
Don't know	25
	3%
Other Answers	28
	3%

Again, this question was asked open-ended, hence the wide variety of responses, which were then post-coded in categories. The most common answers related to people's emotional reactions (in line with the question wording about people's feelings), with one quarter feeling sad, and a further sixth feeling worse than that (eg. 'gutted'). Some respondents provided more practical responses – including how they would adapt to the absence of chocolate – while a minority were much more phlegmatic than the 'gutted' group, including some who would simply get on with life, or might even feel healthier as a result. There were also a number of sceptical respondents who questioned the whole proposition.

Notable verbatim responses, on a range from the most negative reactions to the most positive, include:

[negative]

Disaster
I'd have to die
Gutted
DEPRESSED
I'll be lost without chocolate
CATASTROPHE
I would not be very pleased
sad frustrated baffled
Really bad we need to find alternative solutions
I would be upset because it is a simple pleasure
I would miss it and so would the rest of the world.
Devastated, what would pick me up after a hard day, what would i replace it with?
Devastated for us all not just me. It would be hard not to cook with it
I would be really pig sick - I would miss it and make sure I stock up
I would be very upset chocolate has always been around
All those people without an income would be awful, plus it's a pleasure to eat
SAD FOR MY WIFE
I'd hate it and always be depressed
Would be very sad on an environmental level
WOULD FEEL SOMETHING IS MISSING
A loss of many beneficial effects from cocoa e.g. Source of magnesium, antioxidants or poly phenols. But of course also their taste!
Terrible news.
I can take it or leave it although I would miss my cocoa drink at night time
VERY INSECURE THAT THE WORLD (AND ITS PEOPLE) HAVE LOST A GREAT ASSET
Pretty disappointed. Why are we running out of cocoa?
Disappointed. Sorry for future generations.
Distraught, it's a snack we as humans will crave because we've had a taste already, generations after 2020 will not be able to experience that
Honestly, it will be terrible for us for chocolate to run out :(

It be hell

[neutral/other]

indifferent
no problem
Wouldn't be too concerned.
Would not bother me as I don't eat that much
I could live without it
I'd feel very sad - I'd cope without chocolate but it would ultimately be the farmers at the base level who would suffer…
Duck & run - it will be far worse for the world's men than banning smoking
Manufacturers will find an alternative as it is so popular
when it's gone it's gone
I'd get over it
Ok
It would have to become more of a treat than it is now as the price will increase but this can only be a good thing for farmers.
bad for a while but I suppose I would get used to it
would be a sad day but would live without it
neutral i would find something else
It would be hard to give up chocolate when the price becomes prohibitive
It would be dreadful, however the way of the world is that someone or something will crop up to simulate the choc we know in the planting and manufacture ...at least that's my hope.....
It's not going to run out, it won't suddenly disappear out of existence, supply will be short and this will push up prices, so people will just have to eat less each to afford it.
It isn't necessary for me to eat chocolate to survive so I'd be indifferent
Not an essential, but something I would miss. As an industry with a great deal of subsistence farmers relying on it, this is a far more serious problem. I am curious to know if there are likely employment/income substitutes for those producers.
I am not sure I am confident that research would come up with an alternative taste without using cocoa
Do not think it would matter to me but it is used a lot in food production it would matter to them
I would plant my own and I feel it's bad for farmers and their families, big loss to the world's economy don't think it will
be a shame, would try to prevent if possible
im not bothered to be honest, i can live with out it- and anyway im originally from philippines and we (my family) still grown cocoa- i just go back home and spoiled myself with chocolate, it might not be as good at cadbury or galaxy tho. lol
Not too bothered about me, but effect on the farmers in these countries would be devastating if this is the only crop they can grow.
Sorry for the cocoa farmers
Probably, I will buy more white chocolate or alternative sweets. Make more cookies at home.
Disappointed but would get my sugar fix from something else.
There are plenty of "sweets" chocolate is just one
This is nonsense to increase the price of cocoa
I WOULD EAT SOMETHING ELSE HOWEVER I SUSPECT THIS IS A LIE PUT ABOUT TO INCREASE THE PRICE. IT WILL ONLY RUN OUT IF PEOPLE STOP GROWING COCOA IT'S NOT A FOSSIL FUEL FOR GOODNESS SAKE!!!!!!!!!!!!!!1

[positive]

Could not care less
WOULD MISS IT A BIT BUT WOULD MAKE DO WITH OTHER THINGS INSTEAD
I wouldn't mind too much. I could live quite happily without it
I would eat fruit instead

No real feelings either way, it is a nice to have but would not really affect me if I couldn't have it except that I may lose a bit of weight
Healthier! sad for the producers who rely on the income
Healthier and thinner!
Absolutely delighted as it is a big factor in the obesity problem
I'd be disappointed but we'd all be slimmer so it's a bonus really
indifferent and more healthy
Eat more cheese and not worry about it
Could stop the NHS spending tax payers' money on gastric bands for people that eat too much

Q20 On a scale of 1 to 5, please indicate to what extent you agree with the statement: 'I couldn't live without chocolate'

Base	1003
5 Strongly agree (5)	130
	13%
4 Somewhat agree (4)	221
	22%
3 Neither agree nor disagree (3)	211
	21%
2 Somewhat disagree (2)	190
	19%
1 Strongly disagree (1)	243
	24%
Don't know	8
	1%
Answered	995
Mean	2.8

Respondents were divided on the extent to which they agreed that they 'couldn't live without chocolate', with the smallest group (13%) agreeing strongly, and responses fairly evenly distributed across the other 4 categories. On balance, more respondents disagreed (43% 'strongly' or 'somewhat') than agreed (35%), and this is reflected in the mean score which is marginally on the negative side of neutral (2.8). The spread of responses suggests this question is good at dividing opinion, though it is notable that the single biggest group of respondents disagreed strongly (24%): from their perspective, the question overstates the issue (the second biggest group agreeing somewhat).

Among the quarter of respondents who strongly disagree, men are over-represented (28%, vs. 20 of women), as are those of AB SEG (32%, vs. 22% of C1C2s). Strong disagreement also increases steadily with age, rising from 12% of 18 to 24s to 31% of 55 to 64s. Patterns among those who strongly agree with the statement are approximately inverse: women are much more likely than men to agree strongly (17% vs. 9%) and young respondents are much more likely to agree strongly than are older ones (eg. 20% of 18 to 24s vs. 9% of 55 to 64s).

Q21 Choice between living without chocolate or… - Summary Table

'If you had the choice between living without chocolate and living without 'x' which would you choose?
Please select the item you would KEEP in each of the following choices

[Base for all items = 985]

Chocolate	Chocolate	Chocolate	Chocolate	Chocolate	Chocolate
49%	51%	57%	53%	41%	50%
42%	40%	38%	41%	54%	46%
Cake	Crisps	Facebook	Alcohol	TV	Tea

Chocolate	Chocolate	Chocolate	Chocolate	Chocolate
52%	44%	48%	50%	45%
42%	46%	46%	41%	48%
Coffee	Sex	Exercise	Biscuits	My Smartphone

Of a choice between living without chocolate or 11 other alternatives, respondents chose to keep chocolate in 8 out of 11 cases. The biggest margins for keeping chocolate came in relation to facebook, crisps, biscuits and alcohol. However, TV, smartphones, and sex were all deemed less expendable than chocolate for more respondents than felt the other way, although only TV produced a clear margin against chocolate (13 percentage points) – the relative support for 'my smartphone' (3 points) and sex (2 points) were much narrower (and not statistically significant). It is interesting that there is relatively little subgroup variation for many of these choices, including TV and sex; one exception is 'my smartphone', which was more preferred by women (51% chose it, vs. 45% of men), and younger respondents (eg. 66% of 18 to 24s, vs. 40% of 55 to 64s).

Q22 Do you think there is anything you can personally do to stop chocolate running out?

Total	1003
Yes	111
	11%
No	560
	56%
Don't know	332
	33%

It is striking that only 11% of respondents feel they can personally do anything to stop chocolate running out; the majority of respondents (56%) felt there was nothing they could do. This response is considerably more pessimistic than that given earlier in the survey, in the context of consumer influence on food production generally (rather than chocolate specifically). In that question (Q6.6) 34% of respondents agreed overall that they could 'influence the type of food available where I shop', while 30% overall disagreed. Returning to this question about chocolate running out, it is notable that there is little variation across subgroups: the majority consistently feel there is little they can do (although households with children are slightly more likely to feel they can do something: 15% said so, against 9% of those in households without children).

Q23 Which of the following would you be prepared to do to guarantee a continued supply of chocolate in future?

Base	1003
Cut down how frequently you eat chocolate	427
	43%
Switch to brands that are certified, e.g. Fairtrade	405
	40%
Pay more for the chocolate you eat	319
	32%
Buy smaller bars of chocolate	289
	29%
Eat chocolate with new recipes containing less cocoa	281
	28%
Other	26
	3%
None of these	173
	17%

The majority of respondents having reported in the previous question that there is nothing they can do to guarantee a continuing supply of chocolate, nearly as many indicate that they would be prepared to take most of the steps suggested in this question. Cutting down how much chocolate they eat, and switching to certified brands, are both acceptable to 40% or more of respondents, while a third say they would even be prepared to pay more. Looking at variation by subgroup, the main difference in responses is by gender: women are more prepared than men to switch to certified brands (46% vs. 34%), to pay more (35% vs. 28%), and buy smaller bars (33% vs. 24%). However it is notable that women are slightly less prepared to cut down how often they eat chocolate than men are (41% vs. 44%).

Q24 Likeliness to pay additional amount

If a chocolate bar costs £1 how much more would you be prepared to pay if it guaranteed that farmers would be paid enough money to keep producing cocoa?

Base	1003
1-2p	42
	4%
3-5p	78
	8%
6-10p	210
	21%
11-15p	88
	9%
16-20p	167
	17%
More than 20p	211
	21%
Would not be prepared to pay more	125
	12%
Don't know	82
	8%

In the previous question, only 32% of respondents said they would be willing to pay more for the chocolate they eat, whereas in response to this direct question only 20% said they would not be prepared to pay more or didn't know – meaning 80% say they would pay more. The most popular ranges of price increase that respondents would be prepared pay are between 6p and 10p – acceptable to one fifth (21%) – and more than 20p, also acceptable to one fifth (21%). Interestingly, willingness to pay more than 20p does not vary by socio-economic grade – although it is higher among women (26%, vs. 16% of men), and declines with increasing age (eg. 32% of 18 to 24s, vs. 20% of 55 to 64s).

Q25 Which of the following do you think companies and retailers should do to tackle potential shortages of chocolate in future?

Base	1003
Pay cocoa farmers more for their cocoa	676
	67%
Provide research and training to farmers to help increase cocoa yields	604
	60%
Incentivise the next generation to keep farming cocoa	549
	55%
Fund projects to improve living and working conditions in farming communities	540
	54%
Enable cocoa farmers to have shares in companies that sell chocolate	417
	42%
Charge UK consumers more for chocolate	333
	33%
Give cocoa farmers representation on company boards	333
	33%
Other	15
	1%
None of these	71
	7%

Respondents responded positively to the possible actions for retailers and producers set out in this question: four of the options were endorsed by the majority of respondents. These majority options all related to direct measures by producers and retailers to support cocoa farmers, the most popular being to pay them more for their cocoa: supported by two thirds of respondents (67%; including 72% of women, and 75% of those in DE SEGs). Less popular measures include charging consumers more – supported only by one third of respondents (33%; but rising to 40% among 18 to 24 year olds) – but also changes to ownership models, giving farmers a greater share of profits, and a voice in governance. It is not clear why these options around ownership should only appeal to a minority of respondents: we may speculate that it is because most respondents do not appreciate the potential significance of such changes, or their potential impact on farmers' livelihoods (which judging from this and earlier questions, such as Q19, is something which UK consumers do value). It is notable that female respondents were slightly more likely to support these ownership options than were make respondents (eg. 46% of women supported giving shares to farmers, vs. 37%) but this pattern is consistent across all the options suggested. Interestingly those educated to degree level are not more likely than the average to support these ownership measures.

Q26 Top 3 future challenges for world's supply of cocoa

Base	1003
Low income	536
	53%
Next generation choosing not to become cocoa farmers	497
	50%
Climate change	457
	46%
Crop disease	367
	37%
Hard working conditions	300
	30%
Ageing cocoa farmers	283
	28%
Ageing trees	202
	20%
Other	10
	1%
None of these	47
	5%

Respondents were asked to pick the top 3 reasons why they thought cocoa supplies may be under threat, from a list of 7 pre-set options. It is notable that the top two options, chosen by the majority of respondents, relate to farmers' livelihoods – factors which are addressed by fairtrade certification.

In actual fact, all the above reasons play a part in potential future cocoa shortages. According to press articles (eg. 'Chocolate shortage overstated in the extreme', *Confectionery News* 24/11/14), the principal grounds for fears of a shortfall in cocoa production include: pests and diseases, low incomes, an ageing farmer population, and sub-optimal farming practices. Ageing trees are also known to reduce volumes produced. Climate change is not generally listed as a key challenge, though it ranks third in responses to this survey.

Q27 Which of the following food issues have you heard of?

Total	1003
Price of milk	754
	75%
Decline in bee and pollinator numbers	687
	68%
E-coli	669
	67%
Horsemeat contamination	636
	63%
Campillobacter in chickens	397
	40%
Poor labour standards in UK food picking and packing (eg. fruit)	281
	28%
Shortages of cocoa	258

	26%
Shortage of prosecco	125
	12%
Shortages of bananas	114
	11%
None of these	69
	7%

All the food issues which respondents were presented with are current and genuine; it is notable that the three least chosen options are those relating to food security (ie. scarcity) issues, while the most popular options relate to UK farming and food safety issues. It can suggested that the most chosen options are those which have appeared most prominently in the UK press: milk prices, declines in bee numbers, e coli outbreaks, and the horsemeat scandal have all been extensively covered in the media, and all were selected by the majority of respondents (while campillobacter in chickens has been less widely reported). The potential shortage of cocoa was identified by a quarter of respondents (26%), more than twice the number who identified shortages of bananas or prosecco – although it is likely that the proportion saying so includes those made newly aware through completing this survey. It is notable that at Q18, only 20% said they had heard before that cocoa could run out.

Q28 Preferred chocolate setup operations - Mean Scores

Companies that produce chocolate operate in different ways. Please rank the following set-ups in order of which you would prefer to buy from

Total	1003
A company that pays cocoa farmers enough to invest in their farms	3.84
A company that invests in the future of their cocoa supply	3.30
A company owned by farmers	3.27
A company that is 100% Fairtrade	3.06
A company owned by a global corporation	1.53

In keeping with responses to the previous questions, the most popular attribute of a chocolate company among respondents was that it should pay a fair wage to cocoa farmers. The second most popular attribute was that they should invest in a sustainable cocoa system. As in Q25 above, ownership options were less prioritised, including fairtrade certification, although this was more popular among younger respondents (eg. a mean score of 3.43 among 18 to 24 year olds, for whom it was the second most popular attribute, vs. 2.79 among 45 to 54s). The least chosen option by a considerable margin was that chocolate companies should be owned by global corporations.

Q29A Which of the following chocolate brands are you aware of?

Q29B Which of the following chocolate brands do you eat regularly?

	Q29A – Aware of	Base = 1003		Q29B – Eat regularly	Base = 996
1.	Kit Kat	954	1.	Cadbury Dairy Milk	581
		95%			58%
2.	Cadbury Dairy Milk	950	2.	Galaxy	391
		95%			39%
3.	Galaxy	948	3.	Kit Kat	386
		95%			39%
4.	Toblerone	935	4.	Lindt	207
		93%			21%
5.	Lindt	915	5.	Toblerone	161
		91%			16%
6.	Green & Black's	786	6.	Green & Black's	144
		78%			14%
7.	Milka	675	7.	Milka	83
		67%			8%
8.	Divine	237	8.	Divine	34
		24%			3%
9.	Montezuma's	134	9.	Montezuma's	14
		13%			1%
10.	Seed and Bean	47	10.	Seed and Bean	12
		5%			1%
11.	None of these	7	11.	None of these	166
		1%			17%

In terms of both awareness and regular consumption, Cadbury's Dairy Milk, Galaxy and KitKat were the top three chocolate brands among these respondents – although the awareness and regular consumption rankings varied. In terms of awareness, the top 5 brands enjoyed near total awareness (above 90%), while the sixth and seventh (Green & Black's and Milka) were still familiar to over two thirds of respondents. There was then a big gap to Divine, of which a quarter of respondents (24%) were aware. In terms of regular consumption, CDM was far ahead of the rest, regularly eaten by over a half of respondents (58%); Galaxy and KitKat were the next most eaten, both by over a third (39%). There was then a gap to Lindt (21%), Toblerone (16%) and Green & Black's (14%). Milka (8%) then came ahead of Divine on 3% - one quarter of the proportion regularly eating Green & Black's. In terms of variation by subgroup, almost all brands were significantly more likely to be eaten regularly by those in households with children than those without. Similarly, all brands were more likely to be eaten regularly by those in AB SEGs, except for the top 3 brands where there was no significant variation by SEG – hence it can be said that Cadbury's Dairy Milk, Galaxy and KitKat are truly mainstream brands.

Q29C Which of the following brands do you think are Fairtrade (certified)?

Base	996
Green & Black's	414
	42%
Cadbury Dairy Milk	227
	23%
Kit Kat	128
	13%
Divine	116
	12%
Lindt	107
	11%
Galaxy	97
	10%
Milka	66
	7%
Toblerone	55
	6%
Montezuma's	44
	4%
Seed and Bean	26
	3%
None of these	329
	33%

Only minorities of respondents could identify any of the listed brands as fairtrade – although they were on balance correct in the top 4 which they identified as fairtrade (these were the only fairtrade brands listed). Interestingly Green & Black's was the most commonly identified as fairtrade (by 42% of respondents), ahead of Cadbury's Dairy Milk (by 23%), despite CDM being by far the most widely eaten of these brands: although 58% of respondents eat it regularly, only 23% know it is fairtrade certified. KitKat includes fairly traded cocoa although it is not certified by the Fairtrade Foundation; nonetheless 13% of respondents identified it as fairtrade certified. Finally, Divine was identified as fairtrade certified by 12% of respondents – although it is only regularly eaten by 3%. Women and respondents in AB SEGs were far more likely than others to identify Divine as fairtrade (17% of women vs. 6% of men; 16% of ABs vs. 7% of DEs).

Q29D Which of the following brands do you think are owned by one of these three multi-national companies: Nestle, Mars or Mondelez?

Base	996
Kit Kat	776
	78%
Galaxy	659
	66%
Cadbury Dairy Milk	549
	55%
Toblerone	470
	47%
Milka	238
	24%
Lindt	228
	23%
Green & Black's	118
	12%
Divine	38
	4%
Montezuma's	22
	2%
Seed and Bean	7
	1%
None of these	94
	9%

When asked about the ownership of the listed chocolate brands, respondents were again broadly correct in that the most identified brands were those which are owned by multinationals. They were also correct in that Divine, Montezuma's, and Seed and Bean were the three least identified as owned by multinationals, and none of these are. However, it was only the three most eaten brands which were identified by a majority of respondents as owned by multinationals: KitKat, Galaxy and Cadbury's Dairy Milk. Toblerone and Milka were less readily identified – by 47% and 24% respectively – and may still be more associated with Suchard (then amalgamated into Kraft Jacobs Suchard, then KGF, now named Mondelez). Lindt is in fact independently owned, although 23% (nearly as many as Milka) thought it was owned by a multinational. Green& Black's was the most incorrectly identified brand, with only 12% identifying it as owned by a multinational (it was bought by Cadbury's in 2005, which in turn was bought by KGF now Mondelez). Male respondents, and those in AB SEGs were marginally more likely than average correctly to identify Green & Black's as owned by a multinational (both among 15%, vs. 12% of all).

Q30 Likeliness to try Divine chocolate

Divine is the only 100% Fairtrade chocolate company owned by cocoa farmers.
Kuapa Kokoo, a co-operative of smallholder farmers in Ghana owns 44% of the company. They get a share of the profits, two seats on the board and 2% of the company's turnover is invested in producer support.
Divine is made with the finest quality cocoa, traceable from bean to bar. All products are Fairtrade certified, and include as many Fairtrade ingredients as possible. They are also natural, palm oil free and contain no soya.
Divine is available in over a dozen different chocolate flavours in seriously smooth milk chocolate, velvety rich dark chocolate and gloriously creamy white chocolate.
Now that you know more about Divine how likely are you to try chocolate made by Divine?

Base (all those unaware of Divine at Q29A)	767
Very likely (5)	206
	27%
Quite likely (4)	288
	38%
Neither likely nor unlikely (3)	194
	25%
Quite unlikely (2)	7
	1%
Very unlikely (1)	48
	6%
Don't know	24
	3%
NETS Likely	494
	64%
Unlikely	55
	7%
Mean	3.8

When those respondents who answered that they were not previously aware of Divine (at Q29A) were presented with a statement explaining the fairtrade status, ownership model, ingredients and product range of Divine chocolate, two thirds said that they would be likely to try Divine in future (27% 'very likely' and 38% 'quite likely'). Only 7% said they would be on balance unlikely to try Divine. Women said they were slightly more likely to try it than were men (68% vs. 61%), and likelihood to try Divine decreased steadily with rising age (eg. from 72% of 18 to 24s to 56% of 55 to 64s).

Q31 Highest education level completed

Base	1003
Currently studying at school / university	21
	2%
No formal qualifications	52
	5%
GCSEs	209
	21%
A Levels / NV Qualification	360
	36%
Bachelor's university degree	248
	25%
Higher university degree (Masters, doctorate, MBA)	107
	11%
Prefer not to answer	6
	1%

Q32 Any children under 18 living in HH

Base	1003
Yes	299
	30%
No	699
	70%
Prefer not to say	5
	*%

Q33 Age groups of children in HH

Base	299
Under 5 years	99
	33%
5-9 years	114
	38%
10-14 years	127
	42%
15-17 years	95
	32%
Prefer not to say	0
	0%

Appendix: the Questionnaire

WM1926 - OL - DIVINE CHOCOLATE

i29 - Introduction

This survey should take no more than 20 minutes to complete.

To answer the questions please follow the instructions displayed on the screen.

There are no right or wrong answers, we are solely interested in obtaining your views and opinions on a number of topics related to food and grocery shopping.

The information you provide will be treated as confidential and will not be used for any purpose other than research.

The data is being collected by Opinion Leader, an independent research agency, according to the Market Research Society Code of Conduct.

Thank you for taking part in this survey.

Please click '>>' to continue.

S1 - Gender

To ensure we include a cross section of people in our survey please could you answer the following questions.

What is your gender?

Please select one answer only.

- ❍ Male (1)
- ❍ Female (2)
- ❍ Prefer not to say (3)

S2 - Age group

And which of the following age groups apply to you?

Please select one answer only.

- ❍ Less than 18 (1)
- ❍ 18-24 (2)
- ❍ 25-34 (3)
- ❍ 35-44 (4)
- ❍ 45-54 (5)
- ❍ 55-64 (6)
- ❍ 65 and over (7)
- ❍ Prefer not to say (8)

S3 - Region

Which of the following regions do you live in?

Please select one answer only.

- ❍ North East (1)
- ❍ North West (2)
- ❍ Yorkshire and The Humber (3)

❍ East Midlands (4)
❍ West Midlands (5)
❍ East (6)
❍ London (7)
❍ South East (8)
❍ South West (9)
❍ Wales (10)
❍ Scotland (11)
❍ Northern Ireland (12)
❍ Don't know (99)

S4 - Current occupation

And which of these best describes your current occupation?

(If you are retired on a private or company pension please select the option that best describes your occupation prior to retiring.
If you are a part-time student then please select the option that best describes what you do when you are not studying).

Please select one answer only.

❍ Higher Management / Professional / Administrative eg. Established Doctor, Solicitor, Board Director In A Large Organisation (200 Plus Employees), Top Level Civil Servant, Public Service Employee, Headmaster / Mistress etc. (1)
❍ Intermediate managerial / Professional / Administrative eg. Newly Qualified Doctor (Under 3 Years), Solicitor, Board Director in a small organisation, middle manager in a large organisation, principal officer in civil service, local government etc. (2)
❍ Supervisor or clerical / junior managerial / Professional Administrator eg. Office worker, Student Doctor, Foreman with 25+ employees, Sales Person, Student Teacher etc. (3)
❍ Skilled Manual Worker eg. Brick Layer, Carpenter, Plumber, Painter, Bus / Ambulance Driver, HGV Driver, Unqualified Assistant Teacher, AA Patrol Man etc. (4)
❍ Semi or Unskilled Manual Worker eg. Have no special training or qualification: Apprentice, Caretaker, Cleaner, Nursery School Assistant, non-HGV Driver, Shop Assistant etc. (5)
❍ Unemployed (over 6 months) or Not working Due To Long Term Sickness (6)
❍ Full Time Student (7)
❍ Retired and Living on a State Pension (8)
❍ Prefer not to say (9)

Q1 - Ways to find out the latest news

Which of the following do you use to find out the latest news?

Please select all that apply.

❑ Online forums (1)
❑ Twitter (2)
❑ Facebook (3)
❑ Hard copy newspapers (4)
❑ Online newspapers (5)
❑ Magazines / Publications (6)
❑ TV (7)
❑ Radio (8)
❑ Podcasts (9)
❑ Other (please specify) (10)_____
❍ None of these (11)

Q2 - Read regularly

And which of these do you regularly read either online or as a hard copy?

Please select all that apply.

- ❑ The Times / The Sunday Times (1)
- ❑ The Guardian (2)
- ❑ The Telegraph / The Sunday Telegraph (3)
- ❑ Daily Mail / Mail on Sunday (4)
- ❑ Daily Express (5)
- ❑ The Independent / The Independent on Sunday (6)
- ❑ The Sun (7)
- ❑ The Observer (8)
- ❑ The Mirror / Sunday Mirror (9)
- ❑ Daily Star (10)
- ❑ Financial Times (11)
- ❑ BBC News (12)
- ❑ Local Newspaper (13)
- ❑ Other (please specify) (14)_____
- ❍ None of these (15)

Q3 - Places go for food shopping

In an average week which of the following places do you go to for your food shopping?

Please select all that apply.

- ❑ Local convenience store - part of a chain eg. (Spar) (1)
- ❑ Supermarket - In store (2)
- ❑ Supermarket - Online (3)
- ❑ Market eg. farmers market (4)
- ❑ Local convenience store - independent (5)
- ❑ Health / delicatessen / Farm shops (6)
- ❑ Other (please specify) (7)_____
- ❍ None of these (8)

Q4A - Supermarkets use for food shopping

Which supermarkets do you typically use to do your food shopping; this could be either online or in store?

Please select all that apply.

- ❑ Booths (1)
- ❑ Waitrose (2)
- ❑ Ocado (3)
- ❑ Asda (4)
- ❑ Sainsbury's (5)
- ❑ Tesco (6)
- ❑ Morrisons (7)
- ❑ Iceland (8)
- ❑ Marks & Spencer (9)
- ❑ Co-operative (10)
- ❑ Aldi (11)
- ❑ Lidl (12)
- ❑ Budgens (13)
- ❑ Other (please specify) (14)_____

❍ None of these (15)

Q4B - Supermarkets use MO

Which one of these do you use most often?

Please select one answer only.

❍ Booths (1)
❍ Waitrose (2)
❍ Ocado (3)
❍ Asda (4)
❍ Sainsbury's (5)
❍ Tesco (6)
❍ Morrisons (7)
❍ Iceland (8)
❍ Marks & Spencer (9)
❍ Co-operative (10)
❍ Aldi (11)
❍ Lidl (12)
❍ Budgens (13)
❍ other (14)
❍ None of these (15)

Q5 - Top 5 most important factors when food shopping

Thinking about the individual grocery products that you buy; from the list below please rate the importance of the following factors when shopping for food, where 1 is the least important and 5 is the most important.

	Don't know (1)	1 least important (6)	2 (2)	3 (3)	4 (4)	5 most important (5)
Taste (1)	❍	❍	❍	❍	❍	❍
Quality (2)	❍	❍	❍	❍	❍	❍
Price (3)	❍	❍	❍	❍	❍	❍
Food safety (4)	❍	❍	❍	❍	❍	❍
Ingredients / Food Allergies (5)	❍	❍	❍	❍	❍	❍
Health / Nutrition content (6)	❍	❍	❍	❍	❍	❍
Convenience (7)	❍	❍	❍	❍	❍	❍
Animal Welfare (8)	❍	❍	❍	❍	❍	❍
Locally produced (9)	❍	❍	❍	❍	❍	❍
Buying foods in season (10)	❍	❍	❍	❍	❍	❍
Fairtrade (11)	❍	❍	❍	❍	❍	❍
Environmental impact (12)	❍	❍	❍	❍	❍	❍
Brand (13)	❍	❍	❍	❍	❍	❍

Q6 - Statement ratings

On a scale of 1 to 5, where 1 is "strongly disagree" and 5 is "strongly agree", to what extent, do you agree with the following statements?

Please select one answer only for each statement.

	Don't know (99)	1 Strongly disagree (1)	2 Somewhat disagree (2)	3 Neither agree nor disagree (3)	4 Somewhat agree (4)	5 Strongly agree (5)
It is worth paying more for food that is fairly traded (1)	❍	❍	❍	❍	❍	❍
It is very important to know how my food is produced (2)	❍	❍	❍	❍	❍	❍
I typically don't worry about where my food is grown or raised (3)	❍	❍	❍	❍	❍	❍
I feel well-informed about the quality, safety, and origin of the food I eat (4)	❍	❍	❍	❍	❍	❍
Eating meat is bad for the environment (5)	❍	❍	❍	❍	❍	❍
As a consumer, I can influence the types of food available where I shop (6)	❍	❍	❍	❍	❍	❍
Consumers have little influence over how food is produced (7)	❍	❍	❍	❍	❍	❍

Q7 - Three foods find hardest to live without

Please rank which 3 of these foods and drinks you would find the hardest to live without?

Please drag and drop your answers across.

____ Beer (1)
____ Bananas (2)
____ Bread (3)
____ Beef (4)
____ Milk (5)
____ Sugar (6)
____ Wine (7)
____ Cheese (8)
____ Coffee (9)
____ Tea (10)
____ Chocolate (11)
____ Pasta (12)
____ Potatoes (13)
____ Other (96)

Q7none - None of these

❑ None of these (99)

Q8 - Frequency eat chocolate

How often do you eat chocolate?

Please select one answer only.

❍ Several times a day (1)
❍ Once a day (2)

❍ Several times a week (3)
❍ Once a week (4)
❍ Several times a month (5)
❍ Once a month (6)
❍ A few times a year (7)
❍ Once a year (8)
❍ Less than once a year (9)
❍ Never (10)

Q9 - Where you tend to eat chocolate

Where do you tend to eat chocolate?

Please provide as much detail as possible.

Q10 - Relationship with chocolate

And which one of the following statements best describes your relationship with chocolate?

Please select one answer only.

❍ I really love it (1)
❍ I love it (2)
❍ I like it a lot (3)
❍ I quite like it (4)
❍ I don't have strong feelings either way (5)
❍ I don't like it (6)
❍ I hate it (7)

Q11 - What you love about chocolate

And what is it that you love about chocolate?

Please provide as much detail as possible.

Q12 - Top 5 factors when choosing chocolate for yourself

Please rank your top 5 factors in terms of how important they are to you when choosing chocolate for yourself?

Please drag and drop your answers across.

____ Taste (1)
____ Price (2)
____ Quality (3)
____ Brand (4)

____ Type ie. milk / dark / white (5)
____ Fairtrade (6)
____ Organic (7)
____ Promotion (8)
____ Flavour / ingredients i.e. caramel / nuts / mint (9)
____ Size / weight (10)
____ Nutritional content (11)

Q12none - None of these

❑ None of these (99)

Q13 - Ingredients that go into making chocolate

Can you name any of the ingredients that go into making chocolate?

Please mention as many ingredients as you can think of.

Q14 - What you look for in best quality chocolate

If you wanted to buy the best quality chocolate, which of the following would you look for?

Please select all that apply.

❑ Percentage of cocoa it contains (1)
❑ Origin of ingredients (2)
❑ Where it is made (3)
❑ It's Fairtrade (4)
❑ It's organic (5)
❑ Farmer-owned (6)
❑ Premium packaging (7)
❑ Known brand (8)
❑ Other (please specify) (9)_____
❍ None of these (10)

Q15 - Top 3 countries grow the most cocoa

Cocoa is the main ingredient in chocolate.

Which 3 countries do you think grow most cocoa from the list?

Please select the ones you think are the top 3.

❑ Ghana (1)
❑ Ivory Coast (2)
❑ Indonesia (3)
❑ USA (4)
❑ Brazil (5)
❑ Venezuela (6)
❑ China (7)
❑ Switzerland (8)

- ❑ Belgium (9)
- ❑ Madagascar (10)
- ❑ Ecuador (11)
- ❑ South Africa (12)
- ❑ Uganda (13)
- ❍ None of these (97)
- ❍ Don't know (99)

Q16 - Statements true or false

Please indicate whether the following statements are true or false?

Please select one answer only for each statement.

	True (1)	False (2)
Most of the world's cocoa is grown in West Africa (1)	❍	❍
Most of the world's cocoa is grown by small-scale farmers rather than large plantations (2)	❍	❍
Cocoa grows in the ground (3)	❍	❍
Farmers set the price for the cocoa they grow (4)	❍	❍
Over 70% of chocolate sold in the UK is produced by three multi-national companies (5)	❍	❍

Q17 - What cocoa farmers should afford from cocoa income

Which of the following do you think cocoa farmers should be able to afford from their cocoa income?

Please select all that apply.

- ❑ To buy farming equipment for their farms (1)
- ❑ To feed their families (2)
- ❑ To train on farming methods (3)
- ❑ To send their kids to school (4)
- ❑ To contribute to their community (5)
- ❑ To buy medicine when they or a member of their family is sick (6)
- ❑ Other (please specify) (96)_____

Q18 - Heard about chocolate cocoa shortage

Experts have said that chocolate could start to run out from 2020, because of a predicted shortage of cocoa.

Have you heard about this?

Please select one answer only.

- ❍ Yes (1)
- ❍ No (2)
- ❍ Can't remember (3)

Q19 - How you would feel if chocolate ran out

How would you feel if chocolate ran out?

Please provide as much detail as possible.

Q20 - I couldn't live without chocolate

On a scale of 1 to 5, where 1 is "strongly disagree" and 5 is "strongly agree", to what extent do you agree with the following statement?

I couldn't live without chocolate

Please select one answer only.

❍ Don't know (99)	❍ 1 Strongly disagree (1)	❍ 2 Somewhat disagree (2)	❍ 3 Neither agree nor disagree (3)	❍ 4 Somewhat agree (4)	❍ 5 Strongly agree (5)

Q21 - Choice between living with or without chocolate

If you had the choice between living without chocolate and living without ^f('lQ21')^ which would you choose?

Please select the item you would KEEP in each of the following choices.

❍ Cake (1)
❍ Crisps (2)
❍ Facebook (3)
❍ Alcohol (4)
❍ TV (5)
❍ Tea (6)
❍ Coffee (7)
❍ Sex (8)
❍ Exercise (9)
❍ Biscuits (10)
❍ My smartphone (11)
❍ Chocolate (12)
❍ I don't know (99)

Q22 - Anything you can personally do to stop chocolate running out

Do you think there is anything you can personally do to stop chocolate running out?

Please select one answer only.

❍ Yes (1)
❍ No (2)
❍ Don't know (99)

Q23 - Prepared to do to guarantee future chocolate supply

Which of the following would you be prepared to do to guarantee a continued supply of chocolate in the future?

Please select all that apply.

❑ Cut down how frequently you eat chocolate (1)

- ❑ Switch to brands that are certified, e.g. Fairtrade (2)
- ❑ Eat chocolate with new recipes containing less cocoa (3)
- ❑ Pay more for the chocolate you eat (4)
- ❑ Buy smaller bars of chocolate (5)
- ❑ Other (please specify) (6)_____
- ❍ None of these (7)

Q24 - Likeliness to pay additional amount

If a chocolate bar costs £1 how much more would you be prepared to pay if it guaranteed that farmers would be paid enough money to keep producing cocoa?

Please tick one answer

- ❍ 1-2p (1)
- ❍ 3-5p (2)
- ❍ 6-10p (3)
- ❍ 11-15p (4)
- ❍ 16-20p (5)
- ❍ More than 20p (6)
- ❍ Would not be prepared to pay more (7)
- ❍ Don't know (99)

Q25 - Companies should do to tackle future chocolate shortages

Which of the following do you think companies and retailers should do to tackle potential shortages of chocolate in future?

Please select all that apply.

- ❑ Pay cocoa farmers more for their cocoa (1)
- ❑ Charge UK consumers more for chocolate (2)
- ❑ Give cocoa farmers representation on company boards (3)
- ❑ Enable cocoa farmers to have shares in companies that sell chocolate (4)
- ❑ Fund projects to improve living and working conditions in farming communities (5)
- ❑ Incentivise the next generation to keep farming cocoa (6)
- ❑ Provide research and training to farmers to help increase cocoa yields (7)
- ❑ Other (please specify) (8)_____
- ❍ None of these (9)

Q26 - Top 3 future challenges for world's supply of cocoa

What do you think are the top 3 future challenges for the world's supply of cocoa?

Please select up to a maximum of three answers below.

- ❑ Climate change (1)
- ❑ Crop disease (2)
- ❑ Ageing trees (3)
- ❑ Low income (4)
- ❑ Hard working conditions (5)
- ❑ Next generation choosing not to become cocoa farmers (6)
- ❑ Ageing cocoa farmers (7)
- ❑ Other (please specify) (8)_____
- ❍ None of these (9)

Q27 - Food issues heard of

Which of the following food issues have you heard of?

Please select all that apply.

❑ Horsemeat contamination (1)
❑ Decline in bee and pollinator numbers (2)
❑ Shortages of cocoa (3)
❑ Shortages of bananas (4)
❑ Campillobacter in chickens (5)
❑ Price of milk (6)
❑ E-coli (7)
❑ Poor labour standards in UK food picking and packing (eg. fruit) (8)
❑ Shortage of prosecco (9)
❍ None of these (10)

Q28 - Preferred chocolate setup operations

Companies that produce chocolate operate in different ways.

Please rank the following set-ups in order of which you would prefer to buy from.

Please drag and drop your answers across.

____ A company owned by farmers (1)
____ A company owned by a global corporation (2)
____ A company that is 100% Fairtrade (3)
____ A company that invests in the future of their cocoa supply (4)
____ A company that pays cocoa farmers enough to invest in their farms (5)

Q29A - Chocolate brands aware of

Which of the following chocolate brands are you aware of?

Please select all that apply.

❑ Galaxy (1)
❑ Cadbury Dairy Milk (2)
❑ Green & Black's (3)
❑ Divine (4)
❑ Milka (5)
❑ Lindt (6)
❑ Seed and Bean (7)
❑ Montezuma's (8)
❑ Kit Kat (9)
❑ Toblerone (10)
❍ None of these (11)

Q29B - Chocolate brands eat regularly

Which of the following chocolate brands do you eat regularly?

Please select all that apply.

❑ Galaxy (1)
❑ Cadbury Dairy Milk (2)
❑ Green & Black's (3)
❑ Divine (4)

❑ Milka (5)
❑ Lindt (6)
❑ Seed and Bean (7)
❑ Montezuma's (8)
❑ Kit Kat (9)
❑ Toblerone (10)
❍ None of these (11)

Q29C - Chocolate brands Fairtrade (certified)

Which of these brands do you think are Fairtrade (certified)?

Please select all that apply.

❑ Galaxy (1)
❑ Cadbury Dairy Milk (2)
❑ Green & Black's (3)
❑ Divine (4)
❑ Milka (5)
❑ Lindt (6)
❑ Seed and Bean (7)
❑ Montezuma's (8)
❑ Kit Kat (9)
❑ Toblerone (10)
❍ None of these (11)

Q29D - Chocolate brands owned by multi-national companies

Which of these brands do you think are owned by one of these three multi-national companies: Nestlé, Mars or Mondelez?

Please select all that apply.

❑ Galaxy (1)
❑ Cadbury Dairy Milk (2)
❑ Green & Black's (3)
❑ Divine (4)
❑ Milka (5)
❑ Lindt (6)
❑ Seed and Bean (7)
❑ Montezuma's (8)
❑ Kit Kat (9)
❑ Toblerone (10)
❍ None of these (11)

Q30A - Divine company information

Please read the following ...

Divine is the only 100% Fairtrade chocolate company owned by cocoa farmers.
Kuapa Kokoo, a co-operative of smallholder farmers in Ghana owns 44% of the company.

They get a share of the profits, two seats on the board and 2% of the company's turnover is invested in producer support.
Divine is made with the finest quality cocoa, traceable from bean to bar. All products are Fairtrade certified, and

include as many Fairtrade ingredients as possible. They are also natural, palm oil free and contain no soya. Divine is available in over a dozen different chocolate flavours in seriously smooth milk chocolate, velvety rich dark chocolate and gloriously creamy white chocolate.

Please wait for 30 seconds and then click ">>"

Q30B - Likeliness to try Divine chocolate

Now that you know more about Divine how likely are you to try chocolate made by Divine?

Please select one answer only.

❍ Don't know (1) ❍ Very unlikely (6) ❍ Quite unlikely (2) ❍ Neither likely nor unlikely (3) ❍ Quite likely (4) ❍ Very likely (5)

Q31 - Highest education level completed

Finally, just a few more questions about you which will help us with our analysis ...

What is the highest degree or level of education you have completed?

Please select one answer only.

❍ Currently studying at school / university (1)
❍ No formal qualifications (2)
❍ GCSEs (3)
❍ A Levels / NVQ qualification (4)
❍ Bachelor's university degree (5)
❍ Higher university degree (Masters, doctorate, MBA) (6)
❍ Prefer not to answer (7)

Q32 - Any children under 18 living in HH

Do you personally have any children under the age of 18 living in your household?

Please select one answer only.

❍ Yes (1)
❍ No (2)
❍ Prefer not to say (3)

Q33 - Age groups of children in HH

Which of the following age groups apply to your children?

Please select all that apply.

❑ Under 5 years (1)
❑ 5-9 years (2)
❑ 10-14 years (3)
❑ 15–17 years (4)
❍ Prefer not to say (5)

Complete

Thank you for taking the time to complete the survey, your feedback is very valuable to us and it is greatly appreciated.

Please click '>>' to register your answers.

STOP

Complete –

Quota -

Thank you for clicking through to our survey.

We've had an excellent response and unfortunately we have received enough responses for the target group that you are part of.

We look forward to hearing your views in a future survey.

STOP

QuotaFull –

Screen -

Thank you for clicking through to our survey.

We were looking for specific customers, on this occasion the survey would not be relevant to you.

We look forward to hearing your views in a future survey.

STOP

Screened –