

The Ethical Consumerism Report 2005



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Foreword

Once again, we can report that ethical spending has increased its share of the UK shopping basket. In 2004, the sales of ethical products and services increased by over 15 per cent to total £25.8 billion.

This is welcome news; however, this Report is intended not just to inform on the growth in ethical consumerism, but to identify opportunities to promote the sustainable consumption and production of products and services. A significant finding from this year's Report is that consumers are increasingly taking it upon themselves to tackle climate change, spending £3.4 billion in the process. On average, this equates to some £140 per household. The Report also reveals many areas of accelerating growth such as Fairtrade and free-range eggs. What were previously thought by some as somewhat curious or niche marketing exercises, are now becoming mainstream.

Simon Williams
The Co-operative Bank

This year's Report proves beyond doubt that ethical consumerism is here to stay. Ethical consumption continues to grow rapidly and is far more than just a passing fad. There have been fundamental changes in the way we shop and think about what we buy.

For **nef**, one of the most exciting developments this year is the emergence of a market for micro-generation. While politicians debate targets, consumers are taking matters into their own hands and responding actively to global climate change. We believe that this demonstrates the case for investment in ethical businesses and the active promotion of ethical consumerism as core strategies for tackling the urgent threats to our environment and well-being.

John Taylor
nef (the new economics foundation)

These findings confirm another year of growth in the value of ethically motivated shopping and behaviour, despite toughening economic conditions and a brake on consumer spending. It is interesting to see that consumers are increasingly choosing to withdraw their custom as a means of communicating their concerns with the practices of certain companies, as well as making more positive purchasing choices.



The results suggest that the pursuit of individualism, so rife in the 1980s and 1990s, is now increasingly tempered with the desire to help others, both at home and abroad, and that consumption has become a means by which people's non-material views about the nature of society and the future of the environment can be manifested in a tangible and measurable way. The results should serve as a clarion call to business and government to take this trend very seriously in planning for the future.

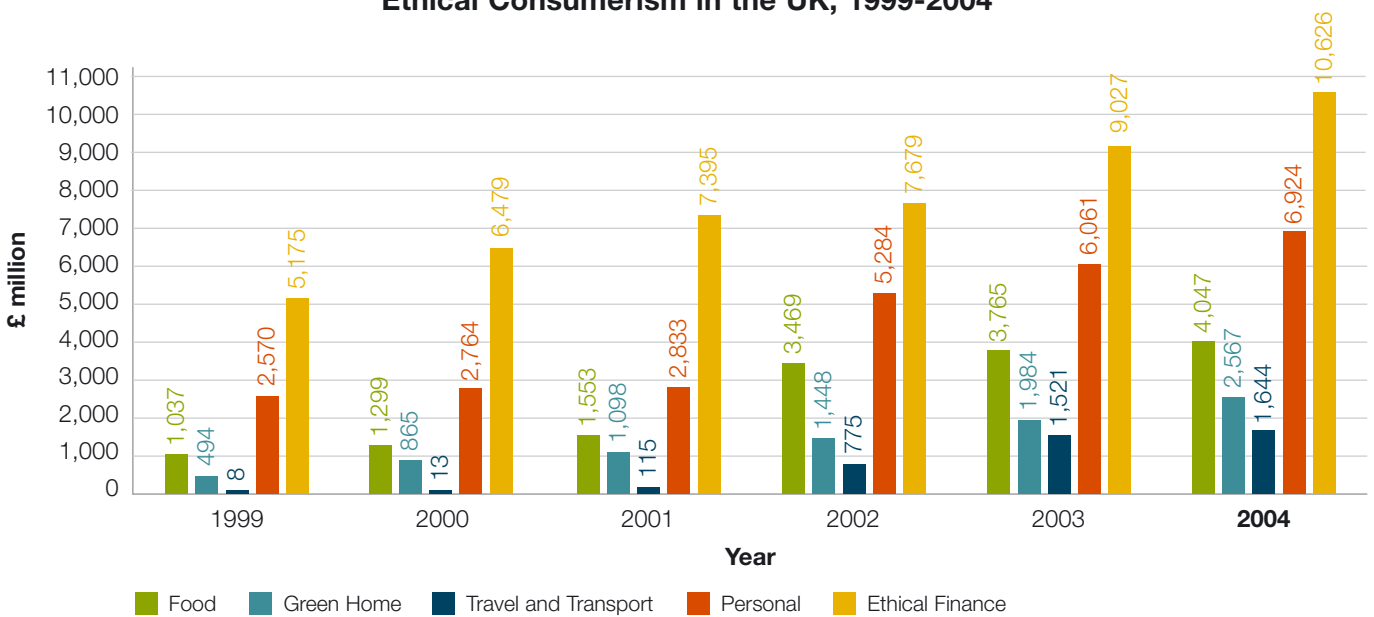
Melanie Howard
The Future Foundation

Results Summary

This year's Ethical Consumerism Report shows that ethical consumption in the UK has grown for the sixth consecutive year. The total value increased 15 per cent, to stand at £25.8 billion in 2004. The Report reveals that:

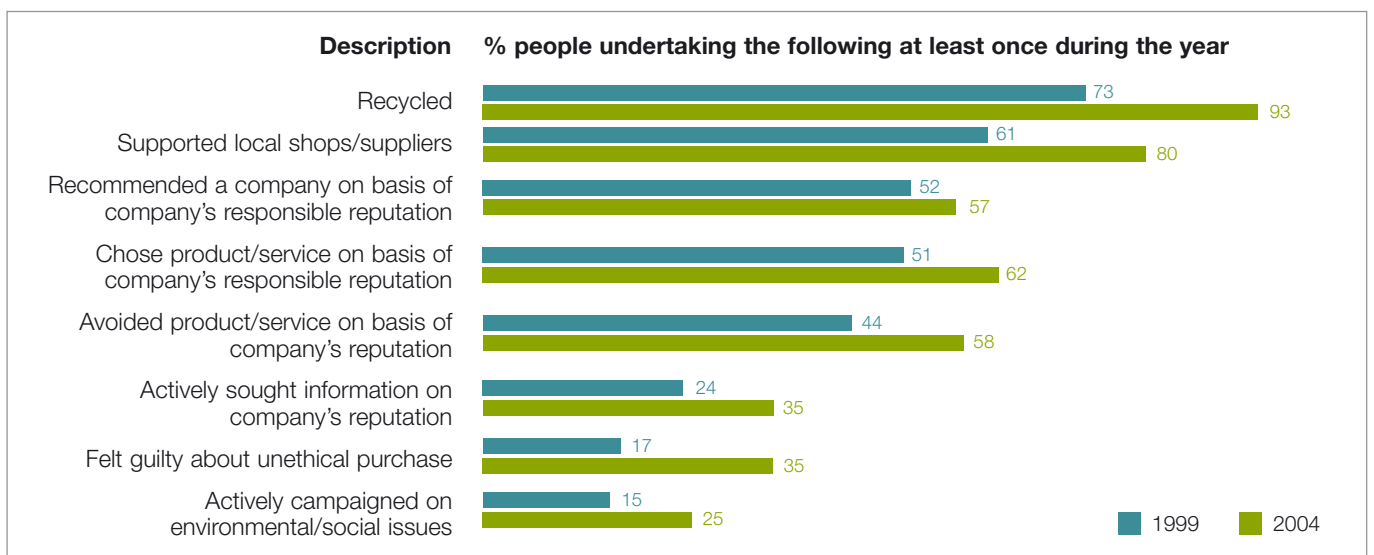
- Money invested ethically broke through the £10 billion barrier for the first time, to stand at £10.6 billion;
- Consumer spend to offset climate change totalled £3.4 billion;
- Spend on food, including Fairtrade and organics, topped £4 billion for the first time;
- Spend on ethical fashion, reported on for the first time, stood at £680 million; and
- Market share for ethical products has increased by 22 per cent over the last six years.

Ethical Consumerism in the UK, 1999-2004



The results of the last six years point to steady growth in ethical consumerism. This is consistent with trends seen in consumer behaviour, (as detailed in the chart below), which show an increase in the awareness and willingness of people to engage with a broad ethical agenda in their purchasing considerations, since 1999.

Consumer behaviour trends



Ethical Consumerism in the UK, 2003-2004

	Spend (2003)	Spend (2004)	% growth (2003-2004)	Page
Food				
Organic	£1,015m	£1,119m	10.2%	8
Fairtrade	£92m	£140m	52.2%	8
Free range eggs	£188m	£215m	14.4%	9
Vegetarian products and meat alternatives	£613m	£626m	2.1%	9
Ethical boycotts – grocery and food outlets	£1,857m	£1,947m	4.8%	9
Sub-total	£3,765m	£4,047m	7.5%	
Green Home				
Energy efficient electrical appliances	£1,102m	£1,361m	23.5%	9
Micro-generation	£5m	£23m	360.0%	10
Green mortgage repayments	£162m	£357m	120.4%	10
Eco-cleaning products	£11m	£13m	18.2%	10
Sustainable timber	£704m	£728m	3.4%	11
Ethical boycotts – other	–	£85m	–	–
Sub-total	£1,984m	£2,567m	29.4%	
Travel and Transport				
Environmentally friendly transport	£22m	£20m	(9.1%)	11
Public transport	£348m	£380m	9.2%	12
Responsible tour operators	£92m	£112m	21.7%	12
Environmental tourist attractions	£19m	£20m	5.3%	12
Ethical boycotts – travel	£1,040m	£1,112m	6.9%	12
Sub-total	£1,521m	£1,644m	8.1%	
Personal				
Ethical clothing	£33m	£43m	30.3%	13
Ethical boycotts – clothing	£273m	£296m	8.4%	13
Buying for re-use	£1,443m	£1,570m	8.8%	13
Humane cosmetics	£186m	£173m	(7.0%)	14
Charitable donations	£2,132m	£2,340m	9.8%	14
Charity shops	£270m	£383m	41.9%	14
Local shopping	£1,724m	£2,119m	22.9%	14
Sub-total	£6,061m	£6,924m	14.2%	
Ethical Finance				
Ethical banking	£4,447m	£4,715m	6.0%	6
Ethical investment	£4,214m	£5,517m	30.9%	6
Credit Unions	£366m	£394m	7.7%	6
Sub-total	£9,027m	£10,626m	17.7%	
Grand Total	£22,358m	£25,808m	15.4%	

Consumer attitudes

Over the last five years, people have become more confident of their influence as consumers. 54 per cent of people in 2004 agreed with the statement, 'As a consumer, I can make a difference to how responsibly a company behaves' (1999: 51 per cent). Just 17 per cent disagreed with this statement (1999: 26 per cent).



2004 Commentary

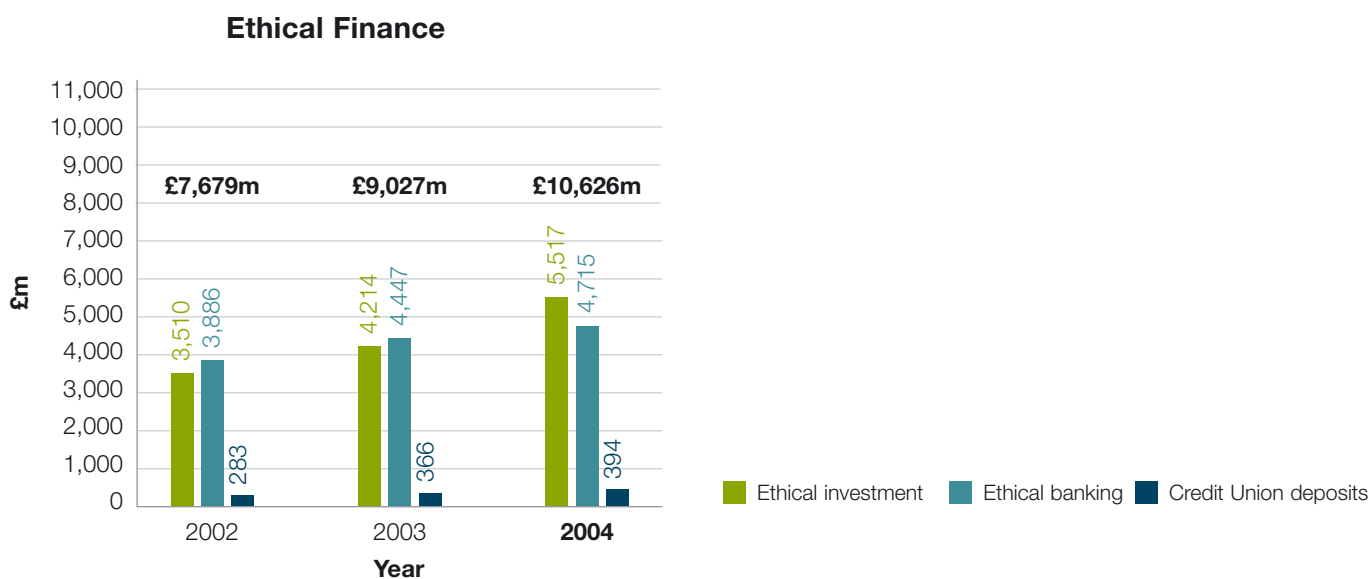
Since 1999, we have reported consistent growth in the value of ethical consumerism. At the same time, whilst total market share for ethical products and services over this period has increased 22 per cent, in total, it remains at under two per cent of sales. In effect, the role of the ethical consumer is to support and pioneer the early development of ethical products and services. Subsequently, with the help of Government intervention, they can make the next step. Typically, the 'goods' are incentivised (such as lead-free petrol), and ultimately 'bads' restricted/banned (leaded petrol). At this point, datasets 'fall out' of the Ethical Consumerism Report as they have become the market norm.

Ethical Finance

In 2004, the amount of money invested ethically in the UK passed the £10 billion barrier for the first time. The total value of £10.6 billion represents an increase of 18 per cent on the 2003 value of £9.0 billion.¹ This is a significant achievement considering it took 15 years for the market to reach the £5 billion mark, but just a further five years for it to double to over £10 billion.¹

The most significant growth is evident within ethical investment, which rose 31 per cent in 2004, to stand at £5.5 billion.

This growth has been driven, in part, by the increased availability of ethical investment products (such as ISA's and unit trusts), and the comparative performance of such investments.



Climate Change

Some 98 per cent of the UK general public claim to have heard the terms 'climate change' or 'global warming', and over 80 per cent agree that climate change is happening now.²

Public understanding of the exact causes and manifestations of climate change is far lower, but despite this, people appear to be increasingly sensitive to the issue and are increasingly willing to alter their behaviour and purchasing patterns accordingly. Of the £25.8 billion of ethical spend in 2004, £3.4 billion, or 13 per cent, can be attributed to actions directed to address climate change impacts.³

¹ www.co-operativebankpressoffice.co.uk

² Futerra Sustainability Communications Ltd, Appendix one, February 2005, see: www.defra.gov.uk/environment/climatechange/pdf/cc-app1.pdf

³ www.co-operativebankpressoffice.co.uk

Spend to address climate change

	2002	2003	2004
Green mortgage repayments	£18m	£162m	£357m
Micro-generation	–	£5m	£23m
Energy efficient electrical appliances	£829m	£1,102m	£1,361m
Environmentally friendly transport	£21m	£22m	£20m
Responsible tour operators	£102m	£92m	£112m
Use of public transport for environmental reasons	£174m	£348m	£380m
Boycotts – travel	£454m	£1,040m	£1,112m
Total	£1,598m	£2,771m	£3,365m

Ethical Fashion

The clothing, textile and footwear industries have probably suffered as much negative publicity on ethical issues as any other. In particular, over the last decade, there has been an almost constant criticism of labour standards in developing country factories. However, even among committed ethical consumers, a lack of availability and information has inhibited purchasing behaviour.⁴ As such, ethical choices in the fashion industry have tended to be expressed via boycotts of clothing companies or via purchases of second hand clothing.

However, the emergence of a number of new ‘ethical’ retailers is reflected in consumer spend on ethical clothing, which in 2004 was £43 million. In addition, consumers were motivated by ethical concerns to spend £341 million on second hand clothing and £296 million resulted from boycotts of clothing and footwear brands.

Ethical fashion

Description	2004
Ethical clothing sales	£43m
Second hand clothing sales	£341m
Boycotts of clothing/footwear brands	£296m
Total	£680m

The development of clear ‘ethical’ labelling will be an important determinant for how rapidly this sector grows. The emergence of a FAIRTRADE Mark for cotton may act as a catalyst for this.

Ethical Labelling

It is notable that one in two people in the UK are now aware of the FAIRTRADE Mark⁵ and that food products bearing this label are experiencing sustained growth in sales. It is, however, concerning that sales of ‘not tested on animals’ cosmetics are not showing a similar level of growth. Cosmetics labelled with the Humane Cosmetics Standard (HCS), only have a market share of less than two per cent, despite the fact that over 80 per cent of the population are opposed to the practice of testing cosmetics on animals. This is down to the variety of labels and standards used by different businesses to signify that a product is not tested on animals. Perhaps it is time that the universal HCS mark was adopted by business to provide the necessary assurance and consistency for customers.

Defining Ethical Consumerism

Within this Report, Ethical Consumerism is defined as personal consumption where choice has been informed by a particular ethical issue – be it human rights, social justice, the environment or animal welfare.

⁴ ‘Fashion Victim?: The impact of sweatshop concerns on clothing choice’, Shaw D., Shui E., Hogg G., Wilson G., Hassan L., 2004

⁵ www.fairtrade.org.uk/about_consumer_research.htm

Food

A wide range of ethical issues are pertinent to the production and supply of food: environmental impact, labour standards and the treatment of animals being just three. In response, a range of alternative standards have emerged such as organics, Fairtrade and free range.

In total, ethical food purchases comprise 16 per cent of the spend on ethical products and services reported for 2004.

Organic

The Soil Association claims that three in four households in the UK bought at least one organic food product during 2004⁶ and there are signs that appeal is growing amongst the less affluent.

Sales of organic food have continued to grow, although at a reduced rate. In 2004, sales stood at £1.1 billion, up 10 per cent. Supermarkets continued to sell the vast majority of organic food, but 2004 saw a decrease in this proportion (to 75 per cent total sales), with sales direct from the producer and local shops increasing by 43 per cent and 33 per cent respectively.⁷

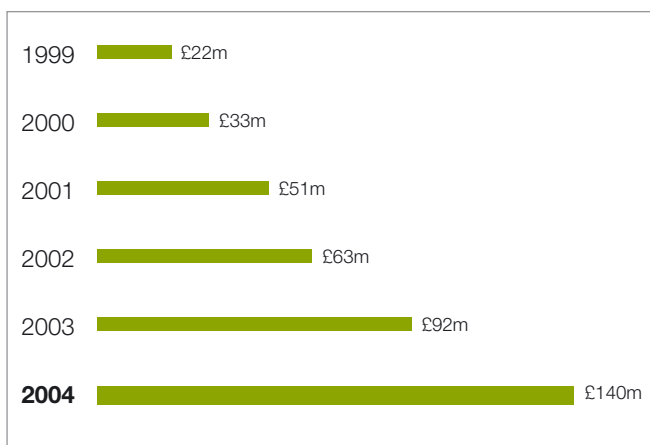
Sales of organic baby food continue to be noteworthy. More than half of all baby food sales in 2004 were organic.⁷

Fairtrade

Sales of products bearing the FAIRTRADE Mark have continued to increase and there are now over one thousand FAIRTRADE Mark products available in the UK.⁸ Fairtrade tea and coffee purchases increased to £62.2 million in 2004, from £43.8 million in 2003 (a rise of 42 per cent). Their share of the market increased from 3.7 per cent to 5.4 per cent in 2004.

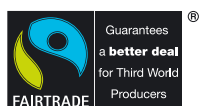
Purchases of 'other'⁹ Fairtrade food products grew to £77.8 million in 2004 from £48.5 million in 2003 – a rise of 60 per cent. Within this category, Fairtrade banana purchases grew by 26 per cent to £30.6 million in 2004, and accounted for over 5 per cent market share. Fairtrade chocolate grew by 51 per cent to £16.5 million.

FAIRTRADE Mark food sales



Organic food

Year	Spend	Share of total food market
1999	£390m	0.7%
2000	£605m	1.0%
2001	£805m	1.3%
2002	£920m	1.5%
2003	£1,015m	1.6%
2004	£1,119m	1.7%



Choose products with this Mark
www.fairtrade.org.uk

www.soilassociation.org



⁶ www.soilassociation.org/web/sa/saweb.nsf/living/index.html

⁷ Organic Market Report (OMR), 14th November 2005 (ISBN 1 904665071). See: www.soilassociation.org/web/sa/saweb.nsf/media/index.html

⁸ www.fairtrade.org.uk/about_sales.htm

⁹ Category 'other' includes chocolate; honey; bananas; other fruits; dried fruit; fruit juice; sugar; wine and flowers.

Free range eggs and vegetarian products and meat alternatives

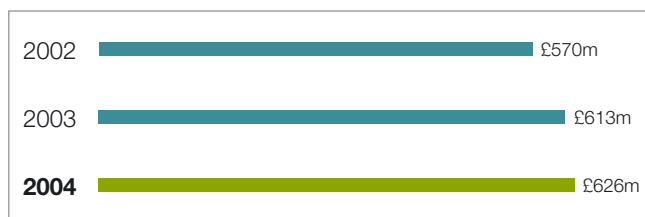
87 per cent of people now oppose the use of caged egg production. Increasingly, this is influencing the supply side, with an increasing number of retailers committed to stocking free range eggs.

Free range eggs accounted for over 40 per cent of the total egg market in the UK in 2004.

Free range eggs

Year	Spend	Share of total egg market
2002	£169m	32.5%
2003	£188m	36.1%
2004	£215m	41.4%

Vegetarian products and meat alternatives



Ethical boycotts – grocery goods and food outlets

28 per cent of consumers boycotted at least one product for ethical reasons during 2004.

Boycotts, once intended as short term signals to business to improve performance, are proving to have increasingly long term repercussions. Even when businesses respond, consumers are slow to revert to previous suppliers of goods and services.

This year's Report indicates that boycotts of grocery goods increased 8.2 per cent to £989 million in 2004 and covered a wide range of produce, including: fruit (labour standards at large scale plantations); meats (intensive farming practices); coffee and chocolate (workers rights); toiletries (animal testing); and breakfast cereals (irresponsible marketing practices).¹⁰

Inevitably, boycotts of food outlets centred around a small number of high street brands. In the main, issues of concern tended to be focussed on the supply chain, including: animal welfare; environmental impact (of production, transportation and waste); and labour standards. Certain individuals also expressed concern about worker rights at retail outlets and advertising practices.

Ethical boycotts – grocery goods and food outlets

	2002	2003	2004	% growth (2003-2004)
• Grocery goods	£787m	£914m	£989m	8.2%
• Food outlets	£942m	£943m	£958m	1.6%

Green Home

Energy efficient electrical appliances

Since 2000, it has been a legal requirement in the UK for new white goods (including washing machines, dishwashers, fridges etc.) to display the European Community Energy Label.¹¹ Sales of higher rated energy efficient electrical appliances (A and above) increased 24 per cent between 2003 and 2004 and account for more than half of the total market.

In the light of this, the time may be appropriate for the Government to introduce a bolder legislative agenda on climate change. For example, restrictions could be placed on the sale of all household appliances with energy efficiency ratings of 'C' and below.

¹⁰ It is worth noting that where a consumer boycotted a product in favour of Fairtrade or organic produce this is not included in the total boycott value. Instead, such purchases are considered positive purchases and captured within the Fairtrade or organic sales data, as appropriate.

¹¹ www.defra.gov.uk/environment/consumerprod/energylabels/energylabel.pdf

Micro-generation

The use of micro-generation – that is, the generation of energy on site – has been included for individual households in this year’s Report for the first time. Sometimes referred to as ‘micro-renewables’, this involves the installation of items such as solar panels, wind turbines, small scale hydro-turbines and ground source heat pumps as alternatives to standard grid-electricity.

The up-take of micro-generation is being assisted by government support through a range of grants to support the costs of capital outlay. Spend on micro-generation in 2004, at £23 million, totalled more than four times the spend of 2003.

Energy efficient electrical appliances¹²

Year	Spend	Share of total market
1999	£136m	7.8%
2000	£229m	13.2%
2001	£515m	31.6%
2002	£829m	41.3%
2003	£1,102m	51.9%
2004	£1,361m	59.4%

Micro-generation



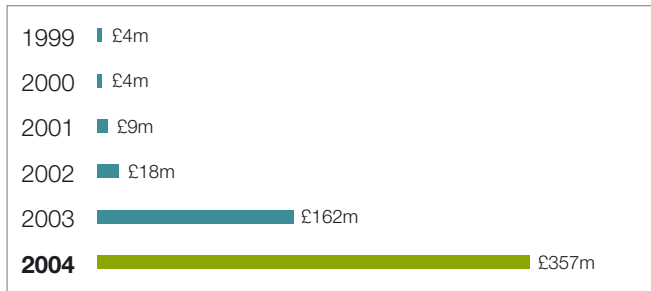
www.est.org.uk
www.clear-skies.org

Green mortgage repayments

Amongst other features, green mortgages usually include an element of carbon offset, whereby the mortgage provider will agree to offset a certain proportion of the carbon dioxide produced by the property during the life of the mortgage.

Repayments connected with such mortgages totalled £357 million in 2004, up from £162 million in 2003, an increase of 120 per cent.

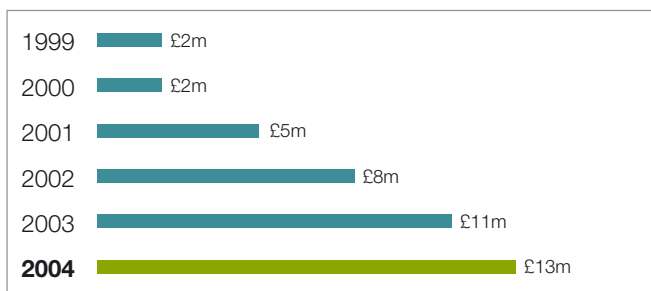
Green mortgage repayments



Eco-cleaning products

Eco-cleaning products use ingredients that, in the main, are non-petroleum based, such as in the surfactants. Sales of these products have continued to grow, and in 2004 stood at £13 million (an annual increase of 18 per cent).

Eco-cleaning products

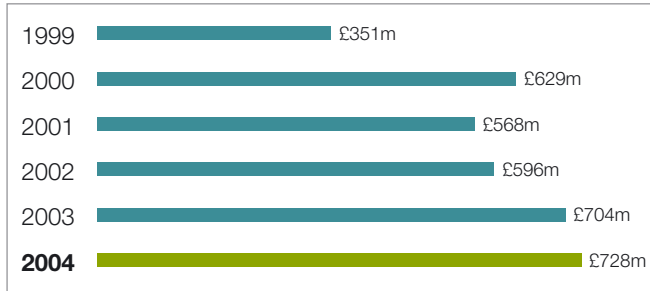


¹² Data provided by GfK Marketing Services

Sustainable timber

Sales of wood, timber and paper from sustainable sources and certified under the Forest Stewardship Council (FSC) scheme are covered in this Report. Alternative labelling schemes do exist, and would increase the total sales for sustainable timber in the UK if included. However, the FSC standard is considered to be the most robust scheme as it includes independent certification and is applicable across the supply chain. In 2004, sales of FSC products increased three per cent to £728 million. However, this is practically static after sales grew 18 per cent between 2002 and 2003.

Sustainable timber: FSC-certified wood



www.fsc-uk.info

FSC Trademarks© 1996 Forest Stewardship Council A.C.

Travel and Transport

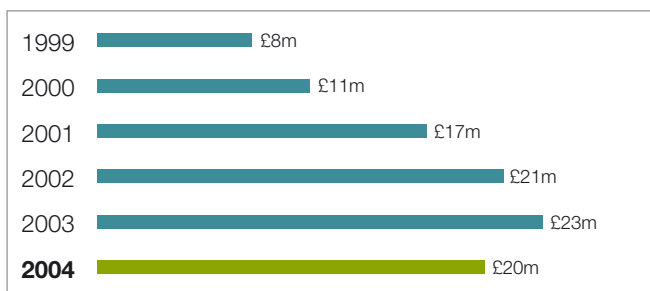
Environmentally friendly transport

This Report only captures a small element of consumer behaviour motivated to reduce the environmental impact of travel. For example, reduced car usage or the purchase of lower emission vehicles cannot be captured.

Worryingly, in 2004, spend was down; however, a number of positive trends are emerging. For example, the number of hybrid electric vehicles sold in the UK in 2004 rose to 1,569, a figure more than four times greater than 2003.¹³ Additionally, the number of people signed up to UK car sharing schemes is rising, offering people the chance to reduce their environmental impact whilst saving money.

Going forward, a new EU car energy labelling scheme, whereby cars will be graded A-G to indicate CO₂ emissions and fuel economy, could further drive consumer choice and expenditure on green transport. Within this Report, we monitor spend on vehicle conversions to reduce emissions as a further activity. This totalled £19.9 million in 2004, representing a decrease of 12 per cent from the 2003 figure of £22.5 million.

Environmentally friendly transport

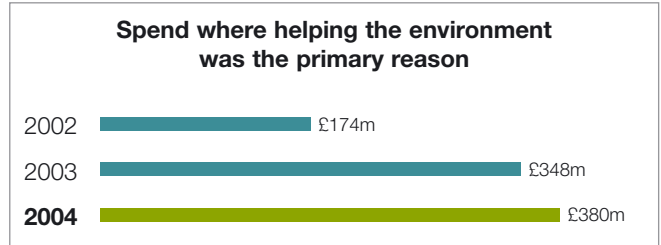
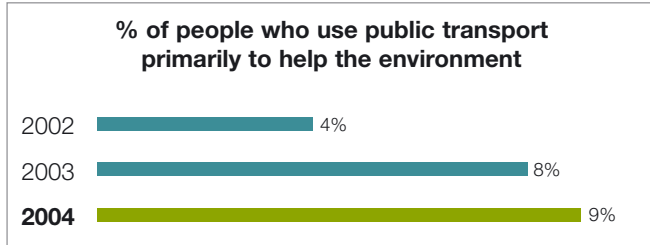


¹³ www.parliament.the-stationeryoffice.co.uk/pa/cm200506/cmhansrd.cm051121/text/51121w06.htm

Public transport

Convenience remains the main reason that individuals choose to use public transport, with 40 per cent of people citing this reason in 2004. For 17 per cent of people, using public transport was motivated by the wish to reduce their environmental impact, and for nine per cent of individuals this was the primary motivation. Total spend by such consumers increased by nine per cent to £380 million, in 2004.

Public transport



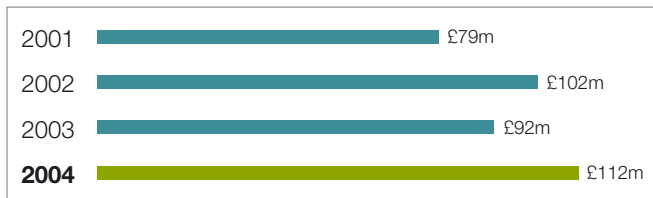
Responsible tour operators and environmental tourist attractions

Responsible tourism can include a diverse range of activities, but this Report encompasses those holidays designed to consider the impact of travel on local people and the environment.

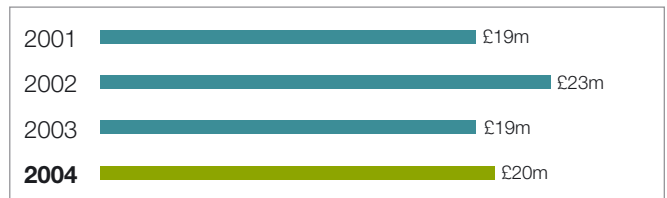
Some 90 per cent of the UK public believe tour operators have a responsibility to preserve the local environment and to benefit local people, and 80 per cent claim they would be more likely to book a holiday with a company that delivers these things.¹⁴

Spend with responsible tour operators increased in 2004 by 22 per cent to £112 million. Whilst spend on visits to environmental tourist attractions was static at £20 million (2003: £19 million).

Responsible tour operators



Environmental tourist attractions



www.responsibletravel.com

Ethical boycotts – travel

This year's Report indicates that boycotts relating to travel expenditure increased 6.9 per cent to £1,112 million, in 2004.

The most frequently cited boycotts related to petrol retailers and the company most frequently named was Esso, cited by some 50 per cent of those engaged in a boycott of a petrol retailer. The most cited reason was the company's attitude to climate change and the perception that it has sought to 'undermine Kyoto'.

Ethical boycotts – travel

	2002	2003	2004	% growth (2003-2004)
• Travel	£454m	£1,040m	£1,112m	6.9%

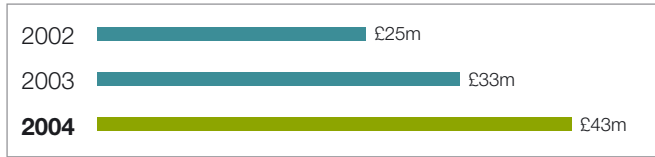
¹⁴ www.responsibletravel.com/Copy/Copy101848.htm

Personal

Ethical clothing

Ethical clothing sales comprise sales of organic cotton, labels that commit to minimum labour standards and clothing made from re-cycled material. In 2004, total sales of these items increased 30 per cent to £43 million.

Ethical clothing sales



Ethical boycotts – clothing

This year’s Report indicates that boycotts of clothing and footwear increased 8.4 per cent to £296 million, in 2004. Boycotts were concentrated on sportswear manufacturers and a small number of High Street clothing retailers. In the main, sweatshop labour concerns dominated reasons for boycotts. In addition, a number of animal welfare concerns, including use of kangaroo skin for football boots, were cited.

Ethical boycotts – clothing

	2002	2003	2004	% growth (2003-2004)
• Clothing	£232m	£273m	£296m	8.4%

Buying for re-use

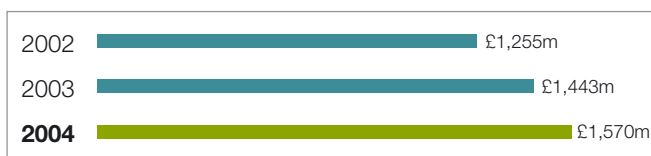
Some 72 per cent of people in the UK claim to have bought second hand goods at least once in 2004. Shopping in charity or second hand shops and purchases through classified ads were the most common channels, followed by second hand furniture outlets, book or record shops, and buying from car boot or jumble sales.

This Report attempts to evaluate the proportion of consumers for whom buying second hand is ‘ethically motivated’. That is to say, motivated by environmental and social concerns.

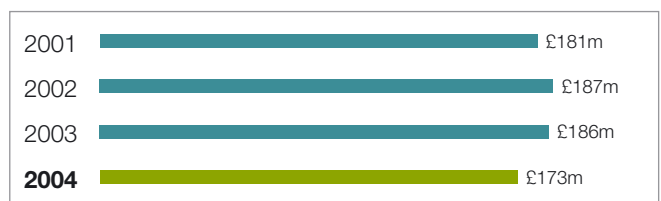
In the development of the Report, consumers were asked to nominate all reasons for purchasing from second hand outlets and then to state the most important reason. Inevitably, cost tended to be the prime driver for most purchases, but other reasons included fashion, convenience and availability.

In 2004, ten per cent of consumers cited environmental concerns as the prime motivation for shopping at second hand outlets and 19 per cent cited social concerns. In total, some £1,570 million spend resulted from these activities, an increase of nine per cent on 2003.

Buying for re-use



Humane cosmetics: Cosmetics and toiletries not tested on animals



Humane cosmetics

More than 8 out of 10 consumers are opposed to the testing of cosmetic products or ingredients on animals. Furthermore, no licences have been granted for cosmetic testing in the UK since 1998 and in 2013 the testing of animals for cosmetics is due to be banned across the EU.

This Report records only sales of cosmetics and toiletries not tested on animals and approved under the Humane Cosmetics Standard (HCS). To be approved, a company must no longer conduct or commission animal testing and must apply a verifiable fixed cut-off date – an unmoveable date after which none of the products or ingredients have been animal tested. It is the only scheme that requires each company to be open to an independent audit throughout the supply chain, to ensure adherence to animal testing policies and the Standard's strict criteria.

Sales of HCS labelled cosmetics and toiletries were £173 million in 2004 down from £186 million in 2003, against a background of flat sales across the cosmetics industry.

Charitable donations and charity shops

Approximately 65 per cent of people in the UK give money to charity. For those donating, this constitutes an average of 1.1 per cent of their income.¹⁵

Charitable donations are included in the Report on the basis that a significant proportion of monies donated relate directly to issues that fall within the definition of ethical consumerism: human rights, social justice, the environment and animal welfare. The most popular issue for donations in 2004 was humanitarian causes.¹⁵

The data reported excludes corporate donations and grants from trusts and foundations. The decrease evident in 2001 and 2002 is thought to be explained by the 'Millenium Effect', whereby significantly more donations were made by people around the turn of the century, skewing the more gentle rate of increase evident in prior years.

Charitable donations and subscriptions

Year	Spend
1999	£2,570m
2000	£2,764m
2001	£2,392m
2002	£1,768m
2003	£2,132m
2004	£2,340m

Charity shops

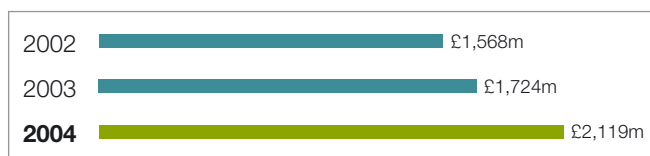
Year	Spend
2001	£261m
2002	£249m
2003	£270m
2004	£383m

Local shopping

According to **nef**, between 1997 and 2002, specialised stores including butchers, bakers, fishmongers and newsagents closed at the rate of 50 per week and general stores have been closing at the rate of one per day. Furthermore, the average person now travels 893 miles a year to shop for food.¹⁶

This Report attempts to evaluate the proportion of consumers who actively seek to support their local community, whilst reducing their environmental impact, by purchasing from local outlets.

Local shopping



In 2004, 43 per cent of people in the UK shopped, at least once, in their local community. Of these individuals, 17 per cent were motivated to do so primarily to support the community, equating to an annual spend, in 2004, of £2,119 million – an increase of 23 per cent on 2003.

¹⁵ www.cafonline.org/conference/speech03_ainger.cfm

¹⁶ www.neweconomics.org/gen/z_sys_publicationdetail.aspx?pid=168

Futher Information

Previous Ethical Consumerism Reports are available at www.co-operativebank.co.uk/epi

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