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Fred A. Yamoah
Kent Business School

Andrew Fearne
Kent Business School

Rachel Duffy
Kent Business School

Dan Petrovici
Kent Business School

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EXPLORING SUPERMARKET LOYALTY CARD ANALYSIS TO IDENTIFY WHO BUYS FAIRTRADE

Fred A. Yamoah, Andrew Fearne, Rachel Duffy & Dan Petrovici
Kent Business School, Centre for Value Chain Research, University of Kent, Canterbury, UK.

ABSTRACT

The aim of this paper is to show how supermarket loyalty card data from a panel of over 1.7 million shoppers can be analysed to provide behavioural segmentation insights to profile the fairtrade shopper in order to enhance making targeted marketing decisions. The paper demonstrates the huge marketing potential that loyalty card based shopper segmentation can bring to objectively describe who buys fairtrade products, compared to profiling shoppers with claimed/reported behaviour dataset. A paired-samples t-test is used to test the degree of appeal of fairtrade tea, coffee, chocolate, drinking chocolates, banana and sugar categories in Tesco to life-stage and lifestyle shopper segments in terms of their retail sales values over 104 weeks. The results show that analysing loyalty cards based on actual behaviour provides a more detailed picture of how specific fairtrade food product categories appeal to the various life-stage and lifestyle shopper segments.

INTRODUCTION

The fairtrade success story has featured prominently the fairtrade shopper as the key factor driving the exponential growth in retail sales (Nicholls and Opal, 2008 and Bowes, 2011). Massive increase in the variety of fairtrade products on the market within the past two decades has been reported (Davies, 2007, Fairtrade Foundation UK Reports, 2006 - 2010). However, there is limited understanding on the profile of the fairtrade shopper (Nicholls and Opal, 2008). On the basis of existing fairtrade statistics (see Fairtrade Foundation Annual Reports 2006 - 2010), the outstanding performance of the fairtrade market and the increased recognition of the fairtrade mark (awareness) could be granted.

But the research evidence around the area of fairtrade shopper attributes and segmentation (Golding and Peattite, 2005, Moore, 2004, Fairtrade Foundation/MORI 2004, Wright and Heaton 2006 and Nicholls and Opal, 2008) rather reported contrasting characteristics of the fairtrade shopper in the UK. The evidence based on the existing literature does not show that fairtrade appeals considerably to any particular shopper segment.

The introduction of fairtrade into supermarkets (mainstreaming) has been accompanied with many people buying fairtrade products (Davies, 2007, TNS World Panel, 2006, Nicholls and Opal, 2008, TNS CAPI, 2009 and Globescan, 2009), and it is very likely that the attributes of the traditional fairtrade shopper have changed. Therefore, applying descriptors of the traditional fairtrade shopper segment prior to the introduction of fairtrade into supermarkets to develop any form of marketing strategy or social policy could be misleading and ineffective. Despite the fact that the fairtrade shopper has been a major stakeholder driving retail sales, the characteristics of a typical fairtrade shopper is not well defined. Therefore, it is important to find out who actually buys fairtrade products in order to attain current, objective and comprehensive profile of the fairtrade shopper to ensure that they are appropriately targeted for sustained growth.

This paper reports the use of loyalty card data from Tesco, a leading grocery retailer to profile the fairtrade shopper in the UK. The aim of the paper is to bridge the prevailing knowledge gap on the profile of the fairtrade shopper driving the over 1 billion fairtrade industry in the UK. The paper also demonstrates how behaviour data can provide a more comprehensive and reliable profile of the fairtrade shopper for effective target marketing, as opposed to using claimed/reported behaviour to profile shoppers. The paper aims at contributing to the existing fairtrade literature as it espouses a novel approach to profile the fairtrade shopper post mainstreaming on the basis actual behaviour data.

The paper is structured into four sections. The next section covers the background to the research, including an overview of the extant literature on fairtrade market segmentation and profile. Theoretical framework and the research hypotheses are then presented. This is followed by the

research methodology, data description and discussion, and statement of findings. Conclusions drawn are presented, followed by research limitations and areas for further research.

FAIRTRADE

Fairtrade concept is about ensuring trading arrangement that empowers all stakeholders with a range of benefits that the conventional international trade model does guarantee (Nicholls and Opal, 2008). It is described as a consumer-driven phenomenon, underpinned by growth of 'ethical' consumption that translates into 'better prices, decent working conditions, local sustainability, and fair terms of trade for farmers and farm workers' in the developing world (Fairtrade Foundation, 2009, Barratt Brown, 1993, Strong, 1996, Nicholls, 2002 and Jones et al. 2008).

The fairtrade market has seen significant growth across Europe, North America and Japan over the past decade (Nicholls and Opal 2008 and Fairtrade Foundation UK, 2006-2010). Global retail sales of fairtrade certified products exceeded 2.3 billion Euros (£1.6 billion) in 2007 (Fairtrade Foundation, 2008). The growth is accounted for by both increased market size and the introduction of new fairtrade products into existing and new markets (FLO, 2008). The UK fairtrade market has grown significantly in terms of retail sales value and the variety of fairtrade products on the market within the past two decades (Davies, 2007).

Over a decade, fairtrade retail sales in the UK increased from £16.7million in 1998 to over £800 million in 2009 (Fairtrade Foundation, 2010 and Bowes, 2011). From the very few fairtrade products on the market in the mid 1980s, there were over 300,000 fairtrade certified products on the UK market by October 2009 (Fairtrade Foundation, 2009). TNS Worldpanel (2006) shows that Tesco had 26.7% share of the fairtrade market in the UK, followed by Sainsbury (22.6%), The Co-operatives (19.1%), Asda (10.9%), Waitrose (9.1%), Morrisons (6.5%) and Somerfield (3.0%). Despite the positive contributions of all stakeholders including fairtrade authorities, non-commercial supporters such as religious groups, campaigners, fundraisers, fairtrade cities and towns, universities and colleges, producers, importers/suppliers, manufacturers and retailers (Tallontire, 2000, Davies, 2007, Doherty

and Trachell, 2007, FLO, 2009 and Fairtrade Foundation, 2009), the fairtrade shopper has been described as key stakeholder driving retail sales (Bowes, 2011).

THE FAIRTRADE SHOPPER

An overview of the extant literature shows that empirical research on the fairtrade shopper has not kept pace with the dramatic growth in retail sales and increased public awareness and recognition of the fairtrade mark. Academic research in this area is scanty and findings on the few existing studies report contrasting profiles of the fairtrade shopper. Whereas Moore (2004) and Fairtrade Foundation/MORI (2004) indicate the typical fairtrade shoppers belongs to the AB1 demographic segment in the UK, Nicholls and Opal (2008) points to an emerging fairtrade shopper segment among younger age groups. In the niche marketing era prior to mainstreaming, it was very easy to find out who actually buys fairtrade products because they were churchgoers, which on the average will be an older person.

Despite adopting mass marketing approach, the fairtrade industry seems to assume that it is the same people who used to buy at church that are buying at supermarkets. But it could be that placing fairtrade products in supermarkets has resulted in the introduction of new demographic segments that are not being treated any differently, because of the assumption that they are buying fairtrade products for the same reason as the people who bought at church. Notwithstanding the significant role of the fairtrade shopper in driving retail sales, research understanding on the attributes of the supermarket fairtrade shopper is limited.

FAIRTRADE SHOPPER SEGMENTATION

Market segmentation as a strategic marketing tool matches a target market with a distinctive marketing strategy (Boote, 1981, Bennett, 1995 and Dibb and Simkin, 2001), and this important principle underpins market segmentation studies. Reviewing the existing literature shows that the bases employed in segmentation studies towards profiling the fairtrade shopper include:

- Shoppers' ethical stands and level of activism (Bird and Hughes,1997, Newholm, 1999, Cowe and Williams, 2000, Nicholls and Opal, 2008 and Globescan, 2009);
- Importance consumers attach to fairtrade (Fairtrade Foundation, 2003, TNS CAPI OmniBus, 2009 and Context Marketing, 2010);
- Shoppers' willingness to pay fairtrade premiums (De Peslmacker et al., 2005) and
- Socio-demographic factors (Cowe and Williams, 2000, Fairtrade Foundation, 2003, TNS CAPI OmniBus, 2009, Globescan, 2009 and Context Marketing, 2010).

Demographic factors, purchasing frequency, sales value and volume of purchases, and other product-related features such as price and taste are common shopper attributes covered in literature (Cowe and Williams, 2000, Fairtrade Foundation, 2003, TNS CAPI OmniBus, 2009, Globescan, 2009 and Context Marketing, 2010). Three key shopper segments identified across the existing strand of fairtrade segmentation studies are: 1) A group of people who buy fairtrade products always, 2) A segment that sometimes buy fairtrade products and 3) A segment that do not buy fairtrade products at all. Key demographic factors highlighted across the segmentation strand of literature include income, gender, age and level of education. However, age (Bird and Hughes, 1997, Nicholls and Opal, 2008, Context Marketing, 2010) and income (De Peslmacker, et al., 2005 and TNS CAPI, 2009) were the most common factors found to influence shopper preference and attitudes towards fairtrade products.

It is worth noting that the review of the extant literature did not find a common descriptor for a typical fairtrade shopper. Another key observation from the literature is that new segments apart from the traditional AB1 demographic group of well educated individuals between the ages of 35 and 55 (Moore, 2004 and Fairtrade Foundation/MORI, 2004), have emerged (Wright and Henson, 2006 and Nicholls and Opal, 2008). Some of the later surveys commissioned by the fairtrade industry indicate that fairtrade has attracted a broad section of shoppers cutting across all age and socio-demographic groups (TNS CAPI, 2009 and Globescan, 2009) and there is little differentiation from UK averages. These findings suggest that due to increased awareness fairtrade mark among the general public in the UK, fairtrade appeals equally to all age groups and socio-demographic classes (Fairtrade Foundation Report, 2011 and Globescan, 2009).

Despite the insight gained through the limited literature on fairtrade shopper segmentation, all findings are based on arguably methodologically weak foundations. Whilst most studies in the area of fairtrade shopper segmentation used claimed/reported behaviour to identify fairtrade shopper segments (see for example, Cowe and Williams, 2000), research commissioned by fairtrade authorities utilized routine surveys and in some cases complemented them with focus group interviews (Fairtrade Foundation, 2003, TNS CAPI OmniBus, 2009, Globescan, 2009). Generally, pre-defined researcher imposed descriptors were used to describe opinions, perceptions, and attitudes of relatively small scale panel of shoppers. Such methodology leads to questioning the integrity of the data collected on the basis of claimed behaviour (Doran, 2009). This presents a major weakness in this area of research because an ethical issue like fairtrade is hugely influenced by social desirability effects (Chatzidakis et al. 2007 and Doran, 2009). Meanwhile, behavioural segmentation is yet to be explored in the segmentation strand of literature.

The fairtrade shopper has been the driving force behind the significant retail sales growth, but such remarkable progress has occurred with limited research understanding of who the fairtrade shopper is. The existing academic literature has also drawn conclusions based on weak methodological foundations. Therefore, it is our contention that fairtrade retail sales value may after all be growing without any careful targeted marketing. Hence, more work need to be done to find out who actually buys fairtrade food products by using actual behaviour data.

THEORETICAL FRAMEWORK

The literature review showed appreciable gap in the existing fairtrade shopper segmentation and profile literature which can be bridged through behavioural segmentation by analysing loyalty card datasets. Particularly, it is not obvious from the literature review that the growth being experienced by fairtrade is as result of increased knowledge about the fairtrade shopper, and may after all be growing without any careful targeted marketing. Segmenting the fairtrade market based on actual behaviour data does not only give currency to academic literature in this area but it is also a unique means of providing a comprehensive and objective profile of the supermarket fairtrade shopper.

Behind this background we theorise that there is a potential marketing insights to be gained for developing targeted marketing strategy by using objective market segmentation procedure to profile the fairtrade shopper. This implies that such marketing insights could facilitate the development of a customer/shopper orientated marketing strategy by precisely working out who buys fairtrade products through behavioural segmentation. Life-stage and lifestyle behavioural segmentation among others, have served as an effective market differentiation tool for leading retailers such as Tesco (dunnhumby, 2011).

Previous studies have used various forms and combinations of life-stage and geo-demographic factors as distinguishing features for fairtrade shopper segmentation (Bird and Hughes, 1997, Moore, 2004 and Fairtrade Foundation/MORI, 2004, Nicholls and Opal, 2008, TNS CAPI, 2009 and Globescan, 2009). Actual shopper data (loyalty card) used for this research covers both life-stage and lifestyle segmentations. The above theoretical framework is tested by measuring the degree of appeal of fairtrade to the various life-stage and lifestyle shopper segments in terms of comparing the means of retail sales accruing to these shopper segments over two-year period.

Based on the above theoretical underpinnings, the following hypotheses are stated:

H1: Fairtrade food products do not appeal equally to all life-stage segments.

H2: Fairtrade food products do not appeal equally to all lifestyle segments.

In order to test the hypotheses, the degree of appeal of fairtrade products will be measured using sales values accrued to life-stage and lifestyle segments from the loyalty card dataset of Tesco over o years. The same analysis was carried on the conventional alternatives to the selected fairtrade food products to crosscheck whether the trends observed within the fairtrade categories are a unique case or similar to trends within conventional products. The proceeding section presents in detail the research methodology and data used to test the stated hypotheses.

METHOD

A paired-samples t-test was used to test the degree of appeal of fairtrade tea, coffee, and chocolate, drinking chocolates, banana and sugar categories as well as the conventional alternatives to these fairtrade products in Tesco to life-stage and lifestyle shopper segments in terms of sales value over 104 weeks. These fairtrade products were selected because they are known as traditional fairtrade products and constitute about two-thirds of the fairtrade food retail sales (Fairtrade Foundation UK, 2010). Paired-samples t-test is deemed most appropriate statistic to use because the loyalty card data samples come from different shopper segments that have been matched on retail sales value, which in the case of this research is the a variable of interest.

Data

Using loyalty card data for comparing means of fairtrade retail sales with the paired-sample t-test among shopper segments has the advantage of being looked at from both aggregated and disaggregated levels. The main advantage of the loyalty card data used for this research was that it was collected on comparatively large scale (Tesco, UK – 1.7million shoppers), over a relatively long period (104 weeks). Because the loyalty data can be disaggregated down to sales trends for different shopper groups at all regional levels, it lends itself to behavioural segmentation that highlights purchasing trends beneath the headline figures.

The loyalty dataset for this research covers weekly retail sales for fairtrade banana, tea, coffee, and chocolate, drinking chocolate and sugar for 104 weeks (9th November 2009 – 24th October 2011). Tesco was selected for its market leadership position in the UK food retail industry, as it has 30.7 percent market share of the total grocery retailing market in the UK (Kantar Worldpanel, 2010).

The data for paired-samples t-test is sourced from dunnhumby Ltd. This database consists of retail sales data from a panel of 17 million UK supermarket shoppers. The dataset captures weekly purchasing data from all Tesco supermarkets in the UK. Tesco is among the top three grocery supermarkets chains in the world and the grocery market leader in the UK. This important dataset is obtained through the Clubcard loyalty scheme. The loyalty scheme covers about 80% of total sales in

Tesco stores across the UK. At the data collection stage for this research, the sample size employed in the database was 10% of the total population of loyalty card holders which was equivalent to 1.7 million shoppers. Dunnhumby (2010) cited the Citigroup's independent research that indicates that, as Tesco operates across all store formats; appeals to all shopper demographics; and reaches 40% of UK households; its loyalty card dataset is representative of the UK shopper.

Apart from the Tesco loyalty card data being representative of the UK shopper, it captures aggregated as well as disaggregated level data which makes it possible to analyse single products or a group of products created by the researcher. In a similar vein, individual fairtrade products categories were analysed for this research. Loyalty card (Clubcard) application form is the source of data for the dunnhumby database. Clubcard applicants provide details about themselves. Typical personal details provided are name, sex, address, telephone and email contact details, household details such as the number of people in the household, the date of birth of the applicant, ages of other household members and dietary needs. The shopper details gathered through the Clubcard application form is used to segment the market on the bases of lifestage, lifestyle, region and geo-demography.

Tesco employs market segmentation strategy to serve targeted segments from the lower income bracket with value products, through the middle with own label/brand, to the upper income bracket segment with finest products. The data provides insight into shopper behaviour based on actual purchasers by answering the following questions regarding the over 265,000 product items in their stores around UK: 1) What is bought 2) What it is bought alongside 3) When it is bought 4) Who it is bought by, and 5) Where it is bought. Felgate (2010) used the dunnhumby dataset to assess the effectiveness of beef promotions across shoppers groups in the UK. Garcia (2011) also used dunnhumby loyalty card data to profile fairtrade shoppers as a means to defining the attributes of buyer sample employed to assess information search and involvement in purchase decision process.

The database allows for the analysis of weekly data on key sales measures for all products sold in Tesco for a period of up to two years. For the purpose of this research the sales measure used was the retail sales value accruing to life-stage and lifestyle shopper segments for fairtrade banana, tea, coffee,

chocolate, drinking chocolate and sugar, and their respective conventional counterparts. The fairtrade retail sales data for the six fairtrade food categories and the conventional alternatives were arranged by sales accruing to shopper life-stage and lifestyle segments.

Dunnhumby provides for five (5) life-stage and three (3) lifestyle shopper segments respectively. Therefore, thirty (30) and eighteen (18) panel dataset for life-stage and lifestyle shopper segments for the six fairtrade products (banana, tea, and coffee, drinking chocolate, chocolate and sugar) were created for the research data analysis. Equal numbers of datasets were created for life-stage and lifestyle shopper segments for conventional alternatives of the chosen fairtrade products as well. The five (5) distinctive life-stage segments are young adults (aged 20-39 years), young families (all children under 10 years), older families (at least one child over 10 years), older adults (aged 40-59 years) and pensioners (adults over 60 years with no children).

Lifestyle shopper segments are: 1) less affluent (price conscious shoppers likely to be on a lower income, shopping for value); 2) mid-market (mainstream shoppers, typically purchasing mid-price brands), and 3) up-market (affluent shoppers who enjoy luxury products and premium brands). The paired-samples t-test is carried out on all the panel dataset for the six selected fairtrade product categories and the conventional alternatives. The objective behind comparing fairtrade and conventional products' trends is to find out whether fairtrade results produced by comparing mean retail sales of the selected shopper segments is a unique case or similar to trends within conventional alternatives to fairtrade. Results from the two sets of analysis (life-stage and lifestyle) for both fairtrade products and the conventional counterparts, and the conclusions drawn on the findings are presented in the next section.

RESULTS AND DISCUSSION

The results of the research are presented in three sets of tables showing the differences in means for aggregated fairtrade products retail sales results (tables 1 and 2); disaggregated fairtrade products categories retail sales (tables 3 and 4), and disaggregated conventional alternatives retail sales (tables

5 and 6) of fairtrade banana, chocolate, drinking chocolate, coffee, sugar and tea. Only results that are significant at least at five percent significance level are reported in the tables 1,2,3 4,5 and 6.

Aggregated Results – Fairtrade Products

Overall, the results for comparing aggregated retail sales means of fairtrade food products accruing to life-stage and lifestyle shopper segments show that all the t-statistic are significant at one percent significance level. Table 1 reveals that the differences in means of fairtrade retail sales among young adults including students, young families, older families, older adults and pensioners are statistically significant. Therefore, fairtrade does not appeal equally to all life-stage shopper segments.

Table 1: Paired-sampled t-test results for comparing the means of aggregated retail sales

Life-stage shopper segments (Group 1 and Group 2)	Weekly Mean Sales Value (£) (Group 1)	Weekly Mean Sales Value (£) (Group 2)	T-value	Significance
Fairtrade Sales Young Adults including Students - Fairtrade Sales Young Families	126053	216721	-36.8**	0.00
Fairtrade Sales Young Adults including Students - Fairtrade Sales Older Families	126053	208133	-29.9**	0.00
Fairtrade Sales Young Adults including Students - Fairtrade Sales Older Adults	126053	137866	-10.0**	0.00
Fairtrade Sales Young Adults including Students - Fairtrade Sales Pensioners	126053	169448	-22.6**	0.00
Fairtrade Sales Young Families - Fairtrade Sales Older Families	216721	208133	11.5**	0.00
Fairtrade Sales Young Families - Fairtrade Sales Older Adults	216721	137866	39.7**	0.00
Fairtrade Sales Young Families - Fairtrade Sales Pensioners	216721	169448	24.0**	0.00
Fairtrade Sales Older Families - Fairtrade Sales Older Adults	208133	137866	33.4**	0.00
Fairtrade Sales Older Families - Fairtrade Sales Pensioners	208133	169448	19.5**	0.00
Fairtrade Sales Older Adults - Fairtrade Sales Pensioners	137866	169448	-35.1**	0.00

Group 1 and 2 refer to the paired samples compared (Significance level **p<0.01 *p>0.05)

The results presented in table 1 further show that whilst some shopper segments reflect high appeal (young and older families), others exhibit a low level of appeal (pensioners and young adults). The differences in the retail sales means of young families in comparison to the other four (4) shopper segments are positive and also significant. Older families also show similar trends in the means comparison with older adults, pensioners and young adults, and the only exception is the comparison with young families. The mean differences between older adults and pensioner shopper segments are positive and significant, but its means comparison with young and older families rather shows a negative but significant effects.

On a spectrum spanning high to low appeal, the results in table 1 reveals fairtrade most appeal to young families, followed by older families, then older adults, pensioners, and young adults including student segment has the least appeal. Thus, three (3) distinctive categories of appeal to fairtrade are evident from the results (see figure 1). Young and older families are in the high appeal category, older adults in the medium appeal group and pensioners and young adults including students in the low appeal category.

Figure 1: Decreasing order of appeal of fairtrade products to life-stage shopper segments

The trend captured in figure 1 is an indication that price could be a key determinant of fairtrade purchasing behaviour.

Table 2 shows that there is a significant difference between the fairtrade retail sales means among lifestyle shopper segments (less affluent, mid market and up market).

Table 2: Paired-sample t-test results for comparing the means of aggregated retail sales

Life-stage shopper segments (Group 1 and Group 2)	**Weekly Mean Sales Value (£) (Group 1)**	**Weekly Mean Sales Value (£) (Group 2)**	**T-value**	**Significance**
Fairtrade Sales Less Affluent - Fairtrade Sales Mid Market	202103	322545	-48.7**	0.00
Fairtrade Sales Less Affluent - Fairtrade Sales Up Market	202103	332670	-69.4**	0.00
Fairtrade Sales Mid Market - Fairtrade Sales Up Market	322545	332670	-5.62**	0.00

Group 1 and 2 refer to the paired samples compared (Significance **p<0.01 *p>0.05)

The magnitude of the t-values in table 2 shows an increasing trend as the affluence gap between the paired-samples increases from (5.629) to (48.797) to (69.438). The results show that fairtrade appeals most to affluent shopper segments than less affluent counterparts, and therefore does not appeal equally to all lifestyle shopper (less affluent, mid market and up market) segments. Therefore, level of affluence is a key determinant of fairtrade food product appeal.

Disaggregated Results – Fairtrade Products

Table 3: Paired-samples t-test results for comparing the means of disaggregated retail sales

	Weekly mean sales (£) for Paired-Samples (Group 1 and 2) and T-value					
Life-Stage Shopper Segments (Group 1 and Group 2)	**Banana**	**Chocolate**	**Drinking Chocolate**	**Coffee**	**Sugar**	**Tea**
Young Adults including Students - Young Families	(22959:37912) **-34.1****	(669:1364) **-25.1****	(28705:55673) **-27.1****	(7642:10414) **-14.8****	(2292:3035) **-13.1****	(3578:4469) **-17.7****
Young Adults including Students - Older Families	(22959:33743) **-30.4****	(669:1494) **-27.9****	(28705:54099) **-24.2****	(7642:11312) **-15.8****	(2292:2931) **-11.2****	(3578:2931) **3.3****
Young Adults including Students - Older Adults	(22959:23921) **-4.7****	(669:881) **-11.0****			(2292:2505) **-6.1****	(3578:4920) **-23.5****
Young Adults including Students – Pensioners	(22959:27845) **-12.1****	(669:1290) **-27.5****	(28705:40519) **-30.3****	(7642:10091) **-11.0****	(2292:2980) **-15.2****	(3578:5398) **-32.6****
Young Families - Older Families	(37912:33743) **27.3****	(1364:1494) **-5.4****	(55673:54099) **6.3****	(10414:11312) **-8.3****	(3035:2931) **3.8****	(4469:2931) **7.6****
Young Families - Older Adults	(37912:23921) **33.9****	(1364:881) **18.7****	(55673:29237) **25.6****	(10414:10217) **2.0***	(3035:2505) **11.4****	(4469:4920) **-8.1****
Young Families – Pensioners	(37912:27845) **25.3****	(1364:1290) **2.9****	(55673:40519) **14.9****	(10414:10091) **2.5***		(4469:5398) **-14.3****
Older Families - Older Adults	(33743:23921) **30.7****	(1494:881) **22.5****	(54099:29237) **23.7****	(11312:10217) **9.1****	(2931:2505) **9.2****	(2931:4920) **-10.3****
Older Families – Pensioners	(33743:27845) **17.4****	(1494:1290) **7.2****	(54099:40519) **13.2****	(11312:10091) **10.8****		(2931:5398) **-13.0****
Older Adults – Pensioners	(23921:27845) **-16.0****	(881:1290) **-16.8****	(29237:40519) **-54.4****		(2505:2980) **-13.5****	(4920:5398) **-8.8****

(Weekly mean sales for the paired samples compared are in brackets and t-values are in bold, Significance **p<0.01 *p>0.05 and only significant results were reported)

Table 4: Paired-samples t-test results for comparing the means of disaggregated retail sales

	Weekly mean sales (£) for Paired-Samples (Group 1 and 2) and T-value					
Lifestyle Shopper Segments	**Banana**	**Chocolate**	**Drinking Chocolate**	**Coffee**	**Sugar**	**Tea**
Less Affluent - Mid-Market	(31350:53171) **-56.4****	(1506:2896) **-35.0****	(52666:90961) **-29.1****	(10383:12285) **-15.6****		
Less Affluent - Up-Market	(31350:61784) **-51.4****	(1506:1297) **8.2****	(52666:64333) **-26.6****	(10383:26929) **-38.3****	(3672:6213) **-22.1****	(5755:11591) **-34.2****
Mid-Market - Up-Market	(53171:61784) **-17.4****	(2896:1297) **37.1****	(90961:64333) **24.6****	(12285:26929) **-39.1****	(3822:6213) **-31.8****	(5783:11591) **-38.3****

(Weekly mean sales for the paired samples compared are in brackets and t-values are in bold, significance **p<0.01 *p>0.05 and only significant results were reported)

The results presented in tables 3 and 4 show that the aggregated datasets like the once presented in tables 1 and 2, do not always reflect the trends beneath the headline figures. Tables 3 shows that unlike the clear-cut trends shown at the aggregated level for the differences in means across life-stage shopper segments, there are significant exemptions to the general trend that fairtrade appeals to most young and older families, and lesser extent to older adults, pensioners and young adults including students. The disaggregated results in table 4 also confirm minor differences in trends for lifestyle shopper segments (less affluent, mid-market and up-market).

Details presented in table 3 shows that five out of the six fairtrade products (banana, chocolate, drinking chocolate and sugar) appeal considerably higher to young and older families and to a lesser extent to older adults, pensioners and young adults including students. On the other hand, fairtrade tea appeals most to pensioners and older adults but appeals to a lesser extent to young and older families and young adults. It is common knowledge that older adults and pensioners have a higher consumption rate for tea compared to young and older families and young adults. If this suggestion should offer a useful explanation for the fairtrade tea results, then fairtrade coffee should have also shown a similar degree of appeal, which per the results in table 3, is not the case.

A cursory observation at average price per unit for tea and coffee show that average prices ranges over the 104 weeks period of the analysis were: 1) £1.33 - £2.11 for fairtrade tea and £2.20 - £3.46 for fairtrade coffee, and £2.07 – £2.93 for conventional tea, and conventional coffee £2.11 - £3.04 (dunnhumby, 2011). Perhaps price differential offers a more plausible explanation for the pensioner shopper segment's preference for fairtrade tea and not coffee, bearing in mind that older adults and pensioners are price sensitive shopper segments.

The aggregated results discussed earlier showed a categorical trend that fairtrade appeals most to the affluent shopper segments than the less affluent shopper segments. However, in the case of the disaggregated data results shown in table 4, only fairtrade banana, coffee, sugar and tea appeals more to the up-market shopper segment. Fairtrade chocolate and drinking chocolate did not show a higher appeal to affluent shopper segment. These two fairtrade chocolate products categories rather appeal

most to the mid-market shopper segment than up-market segment. This is another piece of evidence supporting the need to go beyond headline figures that is evident from analysing aggregated dataset, to investigate the trends behind them with disaggregated dataset. Contrary to the trends from aggregated results, there is no significant difference between the retail sales means of mid-market and less affluent shopper segment in terms of fairtrade sugar and tea appeal (see table 4).

Disaggregated Results – Conventional Alternatives Fairtrade Products

To confirm whether the findings from the analysis of the retail sales means among fairtrade life-stage and lifestyle shopper segments was exclusive to fairtrade product category or not, further analysis was undertaken to compare differences in retail sales means of shopper segments for conventional alternatives to the six fairtrade food products analysed. Comparing the results presented in table 5 to that of table 3, and table 6 to table 4 reveal there is a considerable variability in appeal of fairtrade products and their respective conventional counterparts to life-stage and lifestyle shopper segments. Differences in the retail sales means of the paired-samples occurs not just in terms of varying magnitudes of the t-values but also in the directions of appeal.

Notable pairs that are different in terms of directions of appeal according to tables 5 and 3 are: 1) the appeal of fairtrade and conventional banana to young adults-older adults segments; 2) fairtrade and conventional chocolate to young adults-older adults, young adults-pensioners, young families-older families, and older adults-pensioners; 3) fairtrade and conventional drinking chocolate to young adults-older adults, young adults-pensioners, young families-older families, and young families-older adults; 4) fairtrade and conventional coffee appeal to older adults-pensioners; 5) fairtrade and conventional sugar appeal to older families-pensioners; and 6) fairtrade and conventional tea appeal to young adults-older families, young families-older adults, and older families-older adults.

Table 5: Paired-samples t-tests results for comparing the means of disaggregated retail sales

	Weekly mean sales (£) for Paired Samples (Group 1 and 2) and T-value					
Life-Stage Shopper Segments	**Banana**	**Chocolate**	**Drinking Chocolate**	**Coffee**	**Sugar**	**Tea**
Young Adults including Students - Young Families	(404709:678896) **-44.8****	(1157:4138) **-62.6****	(33320:58199) **-37.8****	(626892:986675) **-56.8****	(224426:392430) **-78.7****	(176445:287137) **-43.9****
Young Adults including Students - Older Families	(404709:583776) **-30.1****	(1157:4111) **-49.9****	(33320:63022) **-33.9****	(626892:1003179) **-55.5****	(224426:379620) **-61.5****	(176445:279838) **-40.8****
Young Adults including Students - Older Adults	(404709:384271) **5.6****	(1157:673) **19.7****	(33320:29404) **11.3****	(626892:798211) **-35.1****	(224426:243815) **-11.2****	(176445:220475) **-28.8****
Young Adults including Students – Pensioners	(404709:463204) **-10.2****	(1157:603) **17.9****		(626892:904173) **-38.3****	(224426:329833) **-37.6****	(176445:292393) **-41.4****
Young Families - Older Families	(678896:583776) **124.2****	(4138:4111) **0.5****	(58199:63022) **-16.3****	(986675:1003179) **-9.1****	(392430:379620) **16.7****	(287137:279838) **13.5****
Young Families - Older Adults	(678896:384271) **72.3****	(4138:673) **68.4****	(58199:29404) **36.1****	(986675:798211) **48.2****	(392430:243815) **84.0****	(287137:220475) **39.3****
Young Families – Pensioners	(678896:462204) **56.5****	(4138:603) **63.8****	(58199:32982) **27.4****	(986675:904173) **14.4****	(392430:329833) **22.4****	(287137:292393) **-2.3****
Older Families - Older Adults	(583776:384271) **52.1****	(4111:673) **58.0****	(63022:29404) **34.3****	(1003179:798211) **54.1****	(379620:243815) **75.1****	(279838:220475) **34.4****
Older Families – Pensioners	(583776:462204) **33.1****	(4111:603) **54.9****	(63022:32982) **27.4****	(1003179:904173) **18.5****	(379620:329833) **18.5****	(279838:292393) **-5.6****
Older Adults – Pensioners	(384271:462204) **-35.4****	(673:603) **3.8****	(29404:32982) **-19.3****	(798211:904173) **-33.1****	(234815:329833) **-54.3****	(220475:292393) **-44.0****

Weekly mean sales for paired samples compared are in brackets and t-values are in bold (Significance **p<0.01 *p>0.05 and only significant results were reported)

Comparing tables 6 and 4 show more pronounced differences in the retail sales means of the lifestyle shopper segments for fairtrade and conventional alternatives in terms of both magnitude and directions. Fourteen (12) out of eighteen (18) parings representing approximately 67 percent of the paired lifestyle shopper samples show an opposite degree of appeal in terms direction. Specifically, less affluent and mid market shopper segments' retail sale means comparisons show significant

differences in the opposite direction of appeal to fairtrade and conventional chocolate, sugar and tea product categories. For example, whereas fairtrade chocolate appeals most mid-market segment, conventional chocolate appeal most to less affluent shopper segment.

Whilst fairtrade banana appeals considerably to the up-market segment, its conventional alternative appeals most to less affluent shopper segment. In addition, the comparison of results in table 6 to 4 show that fairtrade and conventional banana, drinking chocolate, coffee, sugar and tea appeal less to affluent shopper segment relative to the up-market shopper segment. However, conventional banana, drinking chocolate, coffee, sugar and tea appeal rather considerably to less affluent shopper segment relative to up-market shopper segment. Comparing tables 6 and 4 further show opposite direction of appeal of mid-market and up-market paired lifestyle shopper segments to fairtrade as well as conventional banana, coffee, sugar and tea.

Table 6: Paired-samples t-test results for comparing the means of disaggregated retail sales

	Weekly mean sales (£) for Paired-Samples (Group 1 and 2) and T-value					
Life-stage shopper segments	**Banana**	**Chocolate**	**Drinking Chocolate**	**Coffee**	**Sugar**	**Tea**
Less Affluent - Mid-Market	(757669:1101022) **-62.4****	(10705:5753) **61.3****	(74207:86264) **-16.5****	(1316971:1722643) **-79.2****	(584910:604667) **-10.8****	(379050:529085) **-53.6****
Less Affluent - Up-Market	(757669:651983) **42.6****	(10705:3223) **64.5****	(74207:56136) **47.6****	(1316971:1274375) **9.3****	(584910:378511) **96.5****	(379050:347024) **11.9****
Mid-Market - Up-Market	(1101022:651983) **78.4****	(5753:3223) **44.8****	(86264:56136) **37.0****	(1722643:1274375) **70.5****	(604667:378511) **92.4****	(529085:347024) **43.4****

(Weekly mean sales for paired samples compared are in brackets and t-values are in bold, Significance **p<0.01 *p>0.05)

The findings emanating from these set of comparisons are a clear indication that both fairtrade and conventional products alternatives appeal differently to life-stage and lifestyle shopper segments. Hence, fairtrade and conventional food shoppers exhibit distinct shopping behaviours and are

therefore different groups of shoppers and by extension would have different characteristics and profiles, and ought to be treated differently.

CONCLUSIONS

The main purpose of this paper was to demonstrate how supermarket loyalty card data can be analysed to generate unique empirical behavioural segmentation insights to profile the fairtrade shopper in order to enhance making targeted marketing decisions. Attempts in academic research to profile the fairtrade shoppers have relied on claimed/reported behaviour mainly based on smaller data sample over relatively shorter period. Through analysing loyalty card dataset at the aggregated level for fairtrade on one hand, and disaggregated level for fairtrade and conventional alternatives on the other, this paper has demonstrated that behavioural segmentation insight based on loyalty card data leads to objective profiling of the typical fairtrade shopper. The aggregated fairtrade food products' dataset produced statistically significant differences in retail sales means representing their appeal to of life-stage and lifestyle shopper segments. Noting the fact that the loyalty dataset is based on actual shopper purchasing behaviour, the aggregated results represents an objective understanding of fairtrade food shopper characteristics.

Unlike the aggregated dataset results on fairtrade retail sales means differences that was categorical that fairtrade appeals most to affluent young and older families, the disaggregated loyalty card dataset results has provided us with a detailed more insight into the degree of appeal across life-stage and lifestyle shopper segments among specific fairtrade products. The disaggregated results have given a more comprehensive insight into fairtrade appeal trends beneath the headline figures. It has shown that there are significant exemptions to the general trends of appeal reported on the aggregated results that fairtrade appeals most to wealthy young and older families. The findings of this paper further supports the need to go beyond the headline figures to investigate the trends behind them by demonstrating that contrary to aggregated results trends, fairtrade tea appeals most to pensioners and older adults, and fairtrade chocolate and drinking chocolate appeals considerably to mid-market

shoppers. In addition, this paper enables us to see the differences between shopper segments in terms of how they respectively appeal to fairtrade products and their conventional alternatives.

One of the key findings of this paper is that there is considerable variability in the appeal of fairtrade food products to life-stage and lifestyle shopper segments. By looking at the lack of differentiation among UK averages reported by various surveys commissioned by the fairtrade industry (Globescan, 2009, TNS CAPI OmniBus, 2009), this is a significant finding. The significance of this finding is premised on the fact that it demonstrates the potential of market segmentation technique to facilitate effective targeted marketing. Furthermore, it is an important finding because it is based on actual behaviour data which is free from the biases associated with insights produced from analysing claimed/reported data such as social desirability bias (see Doran, 2009).

Another key finding of this paper is that despite the insight gained by analysing the aggregated fairtrade products retail sales loyalty data, disaggregated data provides a more profound understanding of how different shopper groups respond to specific fairtrade food categories. This illustrates the point that aggregated level dataset at best points to a narrow overview of the phenomenon being studied and disaggregated level data provides profound insight into trends beneath the headline figure, and this could be crucial for formulating targeted marketing strategy. The results that led to this finding also suggests the possibility that different results may be observed from aggregated and disaggregated data, but the later is more useful for marketing strategy.

The research has also demonstrated considerable variability in the appeal of fairtrade products compared to the appeal of their conventional alternatives to life-stage and lifestyle shopper segments. Such contrasting appeal of fairtrade versus conventional product portfolios is an indication that fairtrade appeals to a different constituency of shoppers across the life-stage and lifestyle shoppers segments, which are not the same as those with considerable preference for conventional alternatives. This finding brings into sharp focus the argument given by the fairtrade industry to support mainstreaming strategy that since about three-quarters of the general public in the UK are aware of the fairtrade mark, everyone can buy fairtrade products. It is therefore prudent to continue the

implementation of mass marketing strategy (mainstreaming). On the basis of the above findings, would it not be a better option for the fairtrade movement to try and find out those shopper segments that fairtrade appeals to most, who are willing and can afford to pay for what they care about, rather than continuing mainstreaming and selling to everybody by adding to the market as many fairtrade products as possible.

The findings of this paper also contribute to fairtrade literature on fairtrade market segmentation. Existing literature has not found common descriptors for the typical fairtrade shopper (see e.g. Moore, 2004, Fairtrade Foundation/MORI, 2004, Wright and Heaton, 2006 and Nicholls and Opal, 2008). Also, surveys commissioned by the fairtrade industry have suggested little or no differentiation from the typical supermarket shopper (see, TNS CAPI, 2009 and Globescan, 2009). This research found significant differences in fairtrade appeal between affluent young and older families and the other shopper segments. Thus, on the basis of life-stage and lifestyle segmentations the typical fairtrade shopper is best described as the affluent young and older families.

The paper also makes methodological contribution to market segmentation research. The findings of this paper make an important contribution to our understanding of the characteristics of the supermarket fairtrade food shopper through analysing the differences in the means of retail sales accruing to life-stage and lifestyle shopper segments using actual behaviour dataset, which has not been used previously for this objective. The results have shown that there is a unique shopper segment for fairtrade food products, but there are exceptional cases, and the fairtrade movement need to understand these trends in order to implement targeted marketing strategy.

The fairtrade market in the UK has recorded over £1billion in retail sales value by the close of 2011 and it is clear from this paper that much of the sales are attributable to the sales accruing to affluent young and older families' shopper segments without any targeted marketing strategy. These findings are made possible through analysing actual shopper data which are available to leading fairtrade supermarket retailers in the UK. It is imperative for the fairtrade movement to begin to appreciable the fact that the argument for following a mass marketing strategy is fundamentally weak, especially

in the light of these findings. There is the need for the movement to explore the enormous opportunities inherent in objectively working out who buys fairtrade through analysing actual behaviour data – loyalty card panel data is a good example. As the aggregated retail sales continue to grow, the current mass marketing strategy would seem to be working. However, targeted marketing yields the best results for a particular product category, and fairtrade would not be an exception. Implementing a targeted marketing strategy through effective fairtrade shopper segmentation based on actual behaviour data will not only offer fairtrade retail sales reward but provide invaluable understanding of marketing issues surrounding the fairtrade shopper that is critical for long term marketing strategy.

LIMITATIONS AND AREAS FOR FURTHER RESEARCH

The research presented in this paper has limitations. The analysis examines only the six major fairtrade food categories within one retail supermarket. The market segmentation was done on the bases of two demographic factors, life-stage and lifestyle. Other demographic factors such as level of education, geo-demographic factor like regional distribution, and product-related attribute like price, are all possible bases to further segment the fairtrade market. These variables could provide meaningful insights into effective target marketing. Further research can be undertaken to examine the appeal of other fairtrade food apart from banana, tea, coffee, and chocolate, drinking chocolate and sugar as well as non food categories. Such a study will enable us to ascertain whether the typical fairtrade food shopper is the same across all other fairtrade categories, and also likely to reinforce the advantages of disaggregated data over aggregated and claimed datasets. Researching to understand why fairtrade food products appeal significantly to affluent families can also be insightful. Having answers to such a ‘why question’ could prove very useful for any marketing communication strategy aimed at building shopper loyalty and/or behaviour change.

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University of Kent