



Slavery Alert: Consumer Poll, United Kingdom¹

*Findings from research examining how
British consumers would act with regards to
products made with modern slavery.*



**WALK FREE
FOUNDATION**

Executive Summary

- The Global Slavery Index estimates that modern slavery affects some 35.8 million people.² Different forms of modern slavery find their way into the supply chains of many consumer products, whether fresh food, electronics or textiles and clothing.
- Walk Free Foundation undertook a survey of British consumers to understand if they would be willing to act – through switching brands or paying higher prices - to avoid modern slavery in the products they buy.
- The survey was nationally representative so that the results could be extrapolated to all British consumers.
- The survey results confirm that the majority of British consumers would switch brands or pay higher prices to avoid modern slavery in the products they buy.
- 66% of consumers said they would switch products if they learnt their favourite product was made involving modern slavery (20% were not sure, 14% said they would continue buying the product). Of the people who knew how they would act (i.e.: answered clearly they would or would not switch brands), the vast majority (83%) would switch products.
- 53% of consumers said they would pay more for their favourite products in order to ensure they were free from modern slavery (24% were not sure, 23% said they would not pay more). Of the people who knew how they would act (i.e.: answered clearly that they would, or would not pay more), the vast majority (70%) would pay more to ensure their favourite products were not made with modern slavery.
- Of the substantial group of British consumers who are prepared to pay more to ensure their products are free from modern slavery, some 52-58% are prepared to pay up to 10% more for this guarantee, across food, tea and coffee, clothing and even electronics.
- Consumers indicated that a certification mark from an independent body would be more trusted than other sources, to identify and guarantee products are made without modern slavery.
- As the Modern Slavery Bill progresses through the UK Parliament, it is important for politicians and businesses to understand consumer willingness to act, to avoid modern slavery in the products they buy.

Are consumers prepared to push corporates to change their practices, through switching brands or paying more to ensure products are slavery free? The survey results suggest they are.

¹ Survey results are also available for the United States, Brazil and India.

² See further www.globalslaveryindex.org

Introduction

While many people think slavery is a thing of the past, unfortunately research – and recent cases including in the United Kingdom – confirm that modern forms of slavery still occur in 2015. Whether called forced labour, debt bondage, human trafficking, or slavery itself, modern forms of slavery persist in all countries and many industries today, including construction, agriculture, textiles, hospitality, automobiles and electrical goods. Indeed the Global Slavery Index estimates that modern slavery affects some 35.8 million people.³

Within the United Kingdom itself, the 2014 Global Slavery Index estimates that some 8300 people are living in modern slavery (0.013% of UK population). More recently, the UK's own official government estimate, calculated using a different methodology that draws on confidential client records, puts the numbers even higher, at 10,000 - 13,000 people (0.016% of the UK population).⁴ The difference between these two estimates is very small (0.003% when calculated as a percentage of UK population). Both results confirm modern slavery is alive and well in Great Britain.

As a crime, modern slavery is typically well hidden, and perpetrated against individuals who tend to be vulnerable

for a combination of individual and social reasons, whether related to their migration status, disability, gender or caste status. The hidden nature of modern slavery presents serious challenges for law enforcement but also for businesses. Within the supply chains that allow clothing to be manufactured or electronics to be assembled, the use of forced or enslaved labour in supply chains may be many tiers deep.

Just as many consumers do not want to buy products that involve cruelty to animals or environmental harm, it is likely that consumers do not want to buy products built off the back of cruelty to their fellow humans. Walk Free Foundation set out to test this, through running a nationally representative survey in several countries, including the UK, to understand shopping habits and factors impacting on purchasing decisions.

The survey results, described below, are relevant as the UK Parliament considers the Modern Slavery Bill, draft legislation that for the first time, would introduce a focus on corporate action against modern slavery in the United Kingdom. While some responsible corporates already focus on this issue as part of doing business, many do not. Are consumers prepared to push corporates to

change their practices, through switching brands or paying more to ensure products are slavery free? The survey results that follow suggest they are.

Consumer pressure in the United Kingdom has the capacity to potentially impact on the economic sustainability of many atrocities, whether this is forced labour in cotton production in Pakistan, slavery on fishing boats in Thailand or bonded labour in carpet weaving in Nepal. Home to 64 million people, the United Kingdom is a high-income country with a GDP of US\$2.6 trillion and a GDP per capita of US\$41,680.⁵ Towards the end of 2014, household spending grew at its strongest rate in four years.⁶ With a strong economy and increasing household spending, British consumers can be a powerful force for change through their purchasing decisions.



3 See further www.globalslaveryindex.org

4 <https://www.gov.uk/government/publications/modern-slavery-an-application-of-multiple-systems-estimation>. For a write up of the workshop convened by Walk Free Foundation in conjunction with the Home Office, the Royal Statistical Society, the British Academy and Gallup that lead to this estimate, see: <http://www.statslife.org.uk/opinion/1607-measuring-modern-slavery-making-the-invisible-visible>

5 <http://data.worldbank.org/country/united-kingdom>

6 <http://www.telegraph.co.uk/finance/economics/11254884/UK-GDP-growth-powered-by-consumer-spending-as-business-investment-contracts.html>

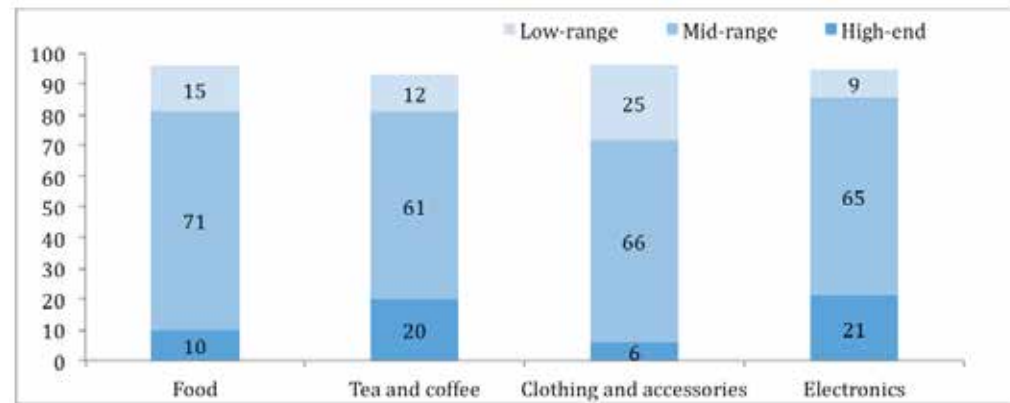
Findings

In December 2014, Walk Free Foundation surveyed 2,067 adults across the UK, using an online survey delivered by YouGov. With a nationally representative sample, the results can be extrapolated across all UK consumers. Consumers were asked a series of questions to understand their shopping habits and purchasing decisions in relation to the freedom of the people who are making the products they buy.

First, information was sought about whether UK consumers usually bought low, medium or high end products in each category. Most respondents usually purchased in the middle range, for most products tested (food, tea and coffee, clothing and accessories, and electronics, see Figure 1). This price point information is useful to compare against information sought later in the survey about purchasing decisions.

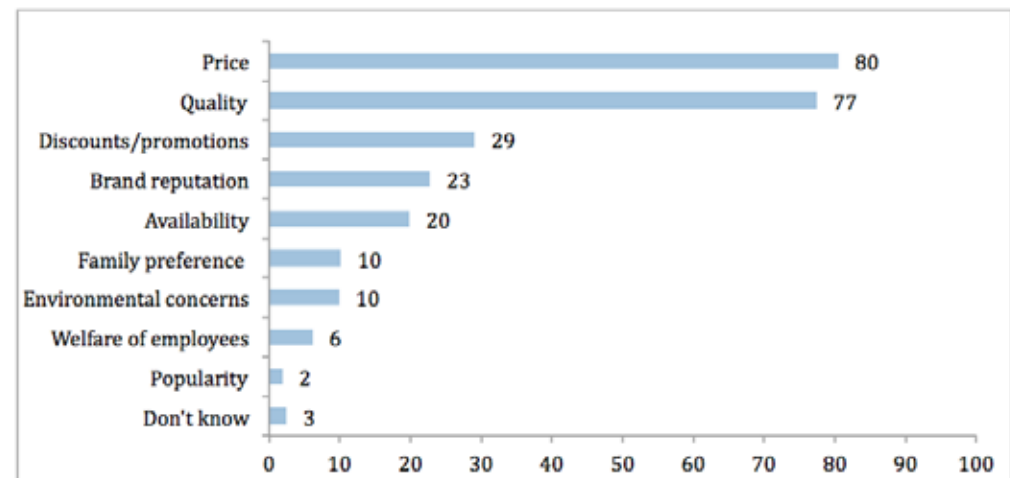


Figure 1: Purchasing break down across product categories (UK)



Information was sought about what factors are important to consumers in purchasing decisions. Of the list provided, price, quality and discounts/promotions were overwhelmingly the three most important factors. The welfare of employees was an important factor for a very small 6% of consumers (see Figure 2).

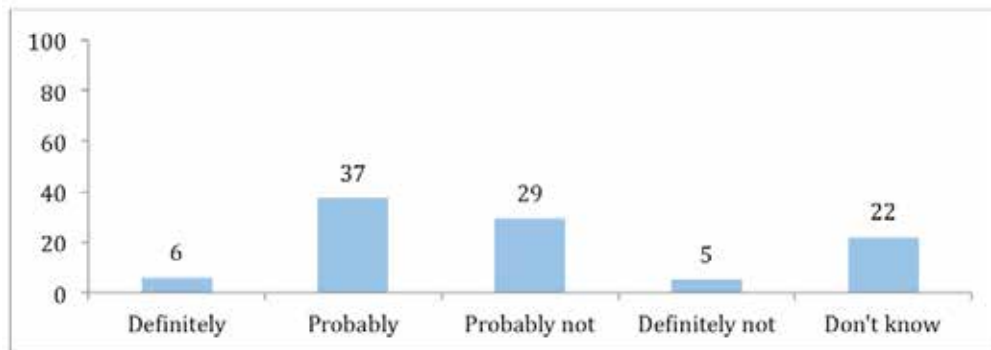
Figure 2: Factors that influence purchasing decisions (UK)



Findings

After these initial questions, respondents were provided with information about the concept of “modern slavery”. It was explained that the term “modern slavery” does not mean low paid workers but instead refers to “forced labour in factories, or farms, where people are forced to work against their will, and they cannot leave”. Following this explanation, information was sought about whether consumers think the products they buy are affected by modern slavery. Some 43% of consumers believe that the products they buy are, or are likely to be, affected by modern slavery. A further 34% did not believe this to be the case, and 22% were not sure if their products were affected by modern slavery (see Figure 3).⁷

Figure 3: Do you think the goods that you buy are affected by modern slavery? (UK)



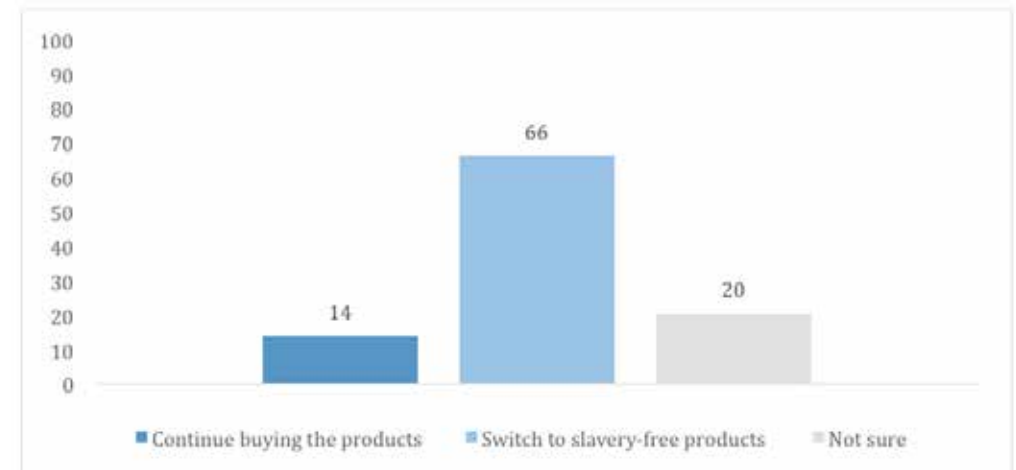
⁷ Because of rounding, not all percentages add up to 100.

Consumers were asked what they would do if they learnt that their favourite product was made involving modern slavery:

- 66% of British consumers said they would switch products if they learnt their favourite product was made involving modern slavery;
- 20% were not sure what they would do;
- 14% said they would continue buying the product (see Figure 4).

Of the people who knew how they would act (i.e.: excluding those who said they were not sure what they would do), the vast majority (83%) would switch products. Within this same group, only 17% thought price and quality were more important than modern slavery considerations when buying a product.

Figure 4: What consumers would do if they found out that their favourite products were made using modern slavery (UK)



Findings

When asked if they would be willing to pay more for their favourite products if this ensured they were produced without the use modern slavery:

- 53% of British consumers said they would pay more to ensure products were produced without modern slavery;
- 24% were not sure;
- 23% said they would not pay more.

Of the people who knew how they would act (i.e.: excluding those who said they were not sure what they would do), the vast majority (70%) would pay more to ensure their favourite products were not made with modern slavery. The remaining 30% said they would not pay more.

Contrary to expectations, price was not a barrier to action, even for those consumers who had nominated price as a key factor in purchasing decisions. Of the 53% of consumers who indicated they would pay more to avoid modern slavery in their purchases, 79% of these had also selected price as one of the three most important factors determining purchasing decisions.

When information about usual price points (low, medium, high end) for products is compared with information about behaviour, it becomes clear that the majority of consumers across all price points, and across all consumer categories tested would take action of some form in response to modern slavery.

Specifically:

- 73% of consumers who buy mainly low-price products would take action involving switching brands or paying more in response to modern slavery;
- 73% of consumers who buy mainly mid-price products would take action involving switching brands or paying more in response to modern slavery;
- 86% of consumers who buy mainly high-priced products would take action involving switching brands or paying more in response to modern slavery.



Findings

Of the group who said they would be willing to pay more, information was sought about *how much more* they would be willing to pay, across food, tea and coffee, clothing and electronics.



Within this group, for food:

- 58% said they would be willing to pay *up to 10% more* to ensure these products were produced without use of modern slavery;
- 31% said they would be willing to pay *over 10% more*;
- 11% didn't know.



For tea and coffee:

- 53% said they would be willing to pay *up to 10% more* to ensure their favourite tea and coffee is produced without use of modern slavery;
- 34% said they would be willing to pay *over 10% more*;
- 13% said they didn't know.



For clothing:

- 52% said they would be willing to pay *up to 10% more* to ensure their favourite clothing was produced without use of modern slavery
- 37% said they would be willing to pay *over 10% more*;
- 11% said they didn't know.



For electronics:

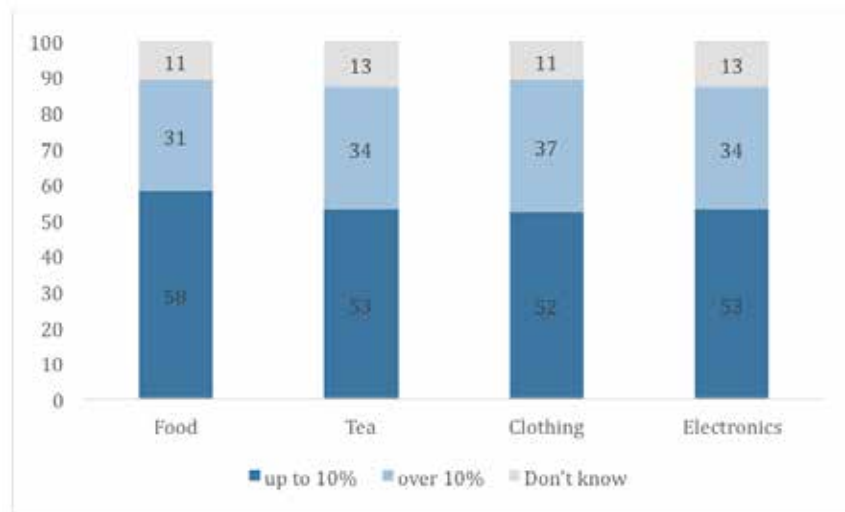
- 53% said they would be willing to pay *up to 10% more* to ensure their favourite electronics were produced without use of modern slavery
- 34% said they would be willing to pay *over 10% more*;
- 13% said they didn't know.

In summary, of the very significant group of British consumers who are prepared to pay more to ensure their products are free from modern slavery, some 52-58% are prepared to pay up to 10% more for this guarantee, across food, tea and coffee, clothing and even electronics. A further 31-37% are willing to pay over 10% more. (See Figure 5 - page 8)



Findings

Figure 5: How much more would consumers be willing to pay to ensure products are made without slavery? (UK)



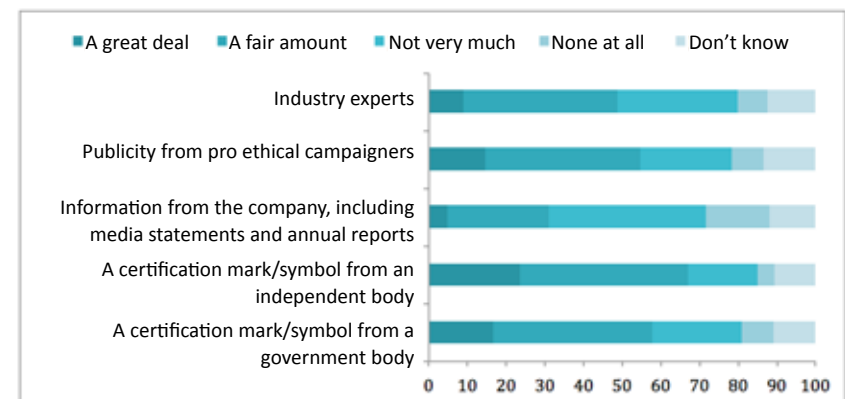
Of the group who would take action, the majority are female (54%) with fewer males (46%). Also within the group that would take action, the largest group was consumers aged over 55 years of age (39%), followed by 35-54 year olds (36%).

Do people who say they will switch products or pay more actually do so in practice? For the purposes of this survey, it was assumed that past behaviour is some indication of likely future behaviour. Accordingly, the survey asked whether consumers had previously stopped buying products after learning they did not meet their ethical expectations. Forty percent of British consumers indicated they had previously stopped buying from a brand/company after learning that the goods did not meet their ethical expectations.

Of this group, 89% also indicated they would act in some way to ensure they did not buy products using modern slavery (6% would not and 5% were not sure). Among the 50% of consumers who had not previously acted on ethical standards, 65% would take some form of action to avoid goods made using modern slavery (24% would not take any action and 11% were unsure).

Consumers were asked about what sources of information they would trust to identify and guarantee products are made without modern slavery. The findings confirm that a certification mark from an independent body would be trusted more than other sources of information (Figure 6).

Figure 6: Which sources of information would consumers trust to identify and guarantee a product was made without modern slavery? (UK)



Implications

Walk Free Foundation's survey results indicate that the majority of British consumers across all price points, and across all consumer categories tested **would take action of some form (either through switching brands and/or paying more) to prevent or in response to concerns about modern slavery. A large proportion of UK consumers are willing to pay up to 10% more to be assured that their purchases are slavery free. Consumers feel that a certification mark from an independent body would be the most trusted source of verification that products are slavery free.**

These findings are particularly relevant as the UK Parliament deliberates the Modern Slavery Bill, a draft law that currently only requires corporates to issue a statement confirming what action (including no action) they have taken to ensure their supply chains are clean from modern slavery. While an important first step,

simply requiring companies to make a report (including a report of zero action) will not provide consumers with the sort of information that will instill confidence that their UK purchases are slavery-free. As political deliberations continue on the *Modern Slavery Bill*, it is important for political representatives to be aware of these high levels of consumer willingness to change purchasing decisions in response to concerns about modern slavery in supply chains, and to not sell British consumers short.

