



WOMEN'S COFFEE SURVEY RESULTS

APRIL 2016





INTRODUCTION

WE WANTED TO FIND OUT MORE ABOUT THE MARKET OPPORTUNITIES AND CHALLENGES FOR WOMEN'S COFFEE

- With help from Atlas Coffee Importers and using Survey Monkey, we surveyed over 100 industry contacts (between January to April 2016) who are already engaged and committed to ethical supply chains
- 85% of respondents are from the US, 13% from Europe and 2% from the Asia Pacific Region (unless stated otherwise, results shown are from US & Europe)
- The results were used to inform the market section of the Twin report, 'Women's Coffee Bringing Greater Gender Justice'



KEY FINDINGS

FEEDBACK FROM BUYERS

- 95% see quality as the key factor in their decision to buy Women's Coffee
- 85% believe that lack of consumer awareness is the main challenge for Women's Coffee
- 80% want more support to market Women's Coffee through stories, information on gender justice work and impact data



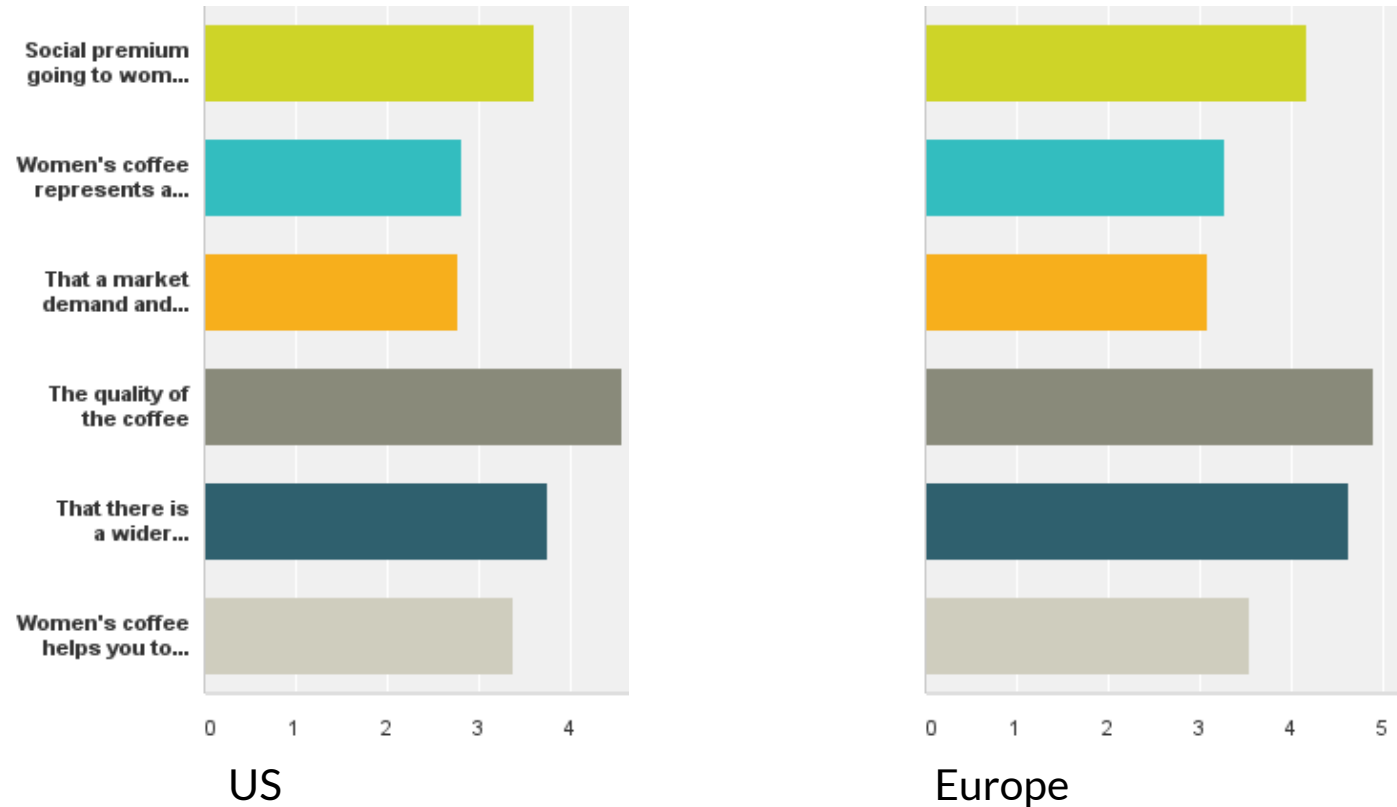
QU.1 - REASONS FOR PURCHASING WOMEN'S COFFEE

HOW IMPORTANT WOULD THE FOLLOWING REASONS BE IN YOUR DECISION TO PURCHASE WOMEN'S COFFEE?

- Social premium going to women (usually 20cts/lb)
- Women's Coffee is a marketing USP opportunity
- That a market demand & interest for Women's Coffee already exists
- The quality of the coffee
- That a wider programme of work exists on gender justice at the producer organisation
- Women's Coffee helps you to demonstrate your ethical commitment and relationship with producers



QU.1 - RESPONSES



Response options = not important at all (1), slightly important (2), moderately important (3), very important (4), extremely important (5)



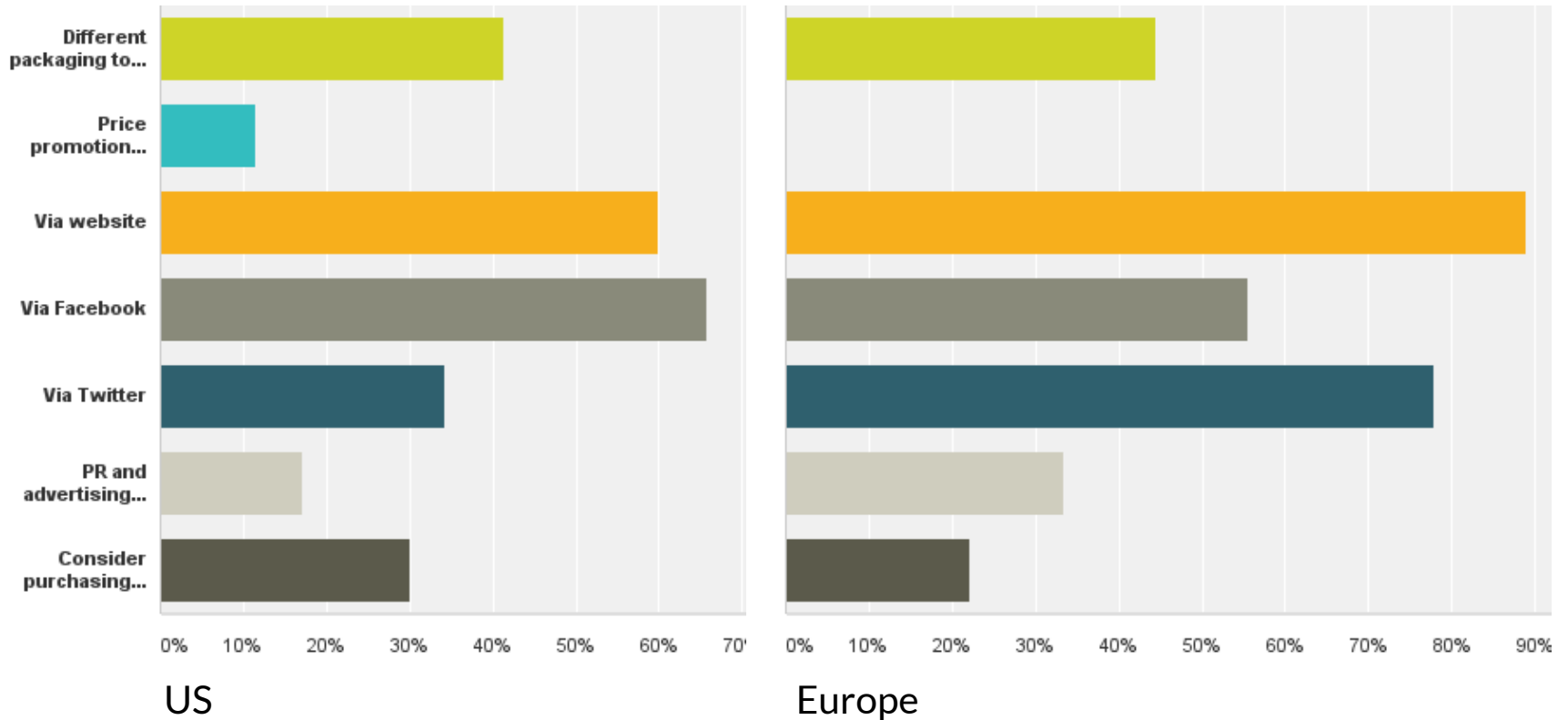
QU.2 - MARKETING WOMEN'S COFFEE

HOW WOULD YOU MARKET WOMEN'S COFFEE - PLEASE TICK AGAINST ALL RELEVANT ASPECTS OF YOUR CAMPAIGN

- Different packaging to the rest of your range
- Price promotion (coupon or in-store)
- Via website
- Via Facebook
- Via Twitter
- PR & advertising campaign (e.g. Magazine articles, radio, Facebook ads)
- Consider purchasing Women's Coffee but not market it as such



QU.2 - RESPONSES



NB. Of 9 US roasters surveyed separately who already purchase Women's Coffee, 50% have not marketed it as such.



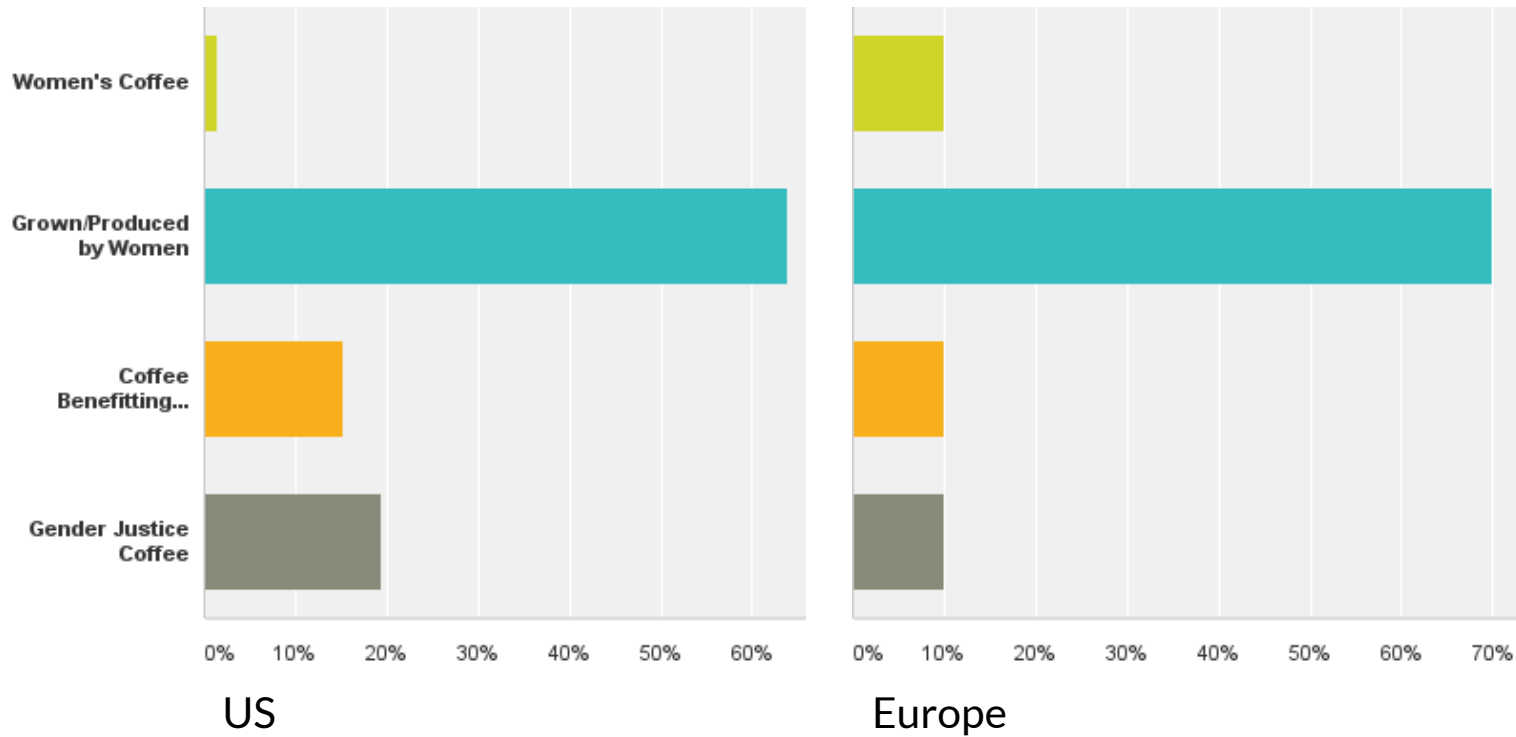
QU.3 - WHICH TERM TO USE FOR WOMEN'S COFFEE

HOW DO YOU THINK WOMEN'S COFFEE WOULD BE MOST EFFECTIVELY PHRASED FOR MARKETING? CHOOSE 1 OPTION

- Women's Coffee
- Grown/Produced by Women
- Coffee Benefitting Women
- Gender Justice Coffee



QU.3 - RESPONSES





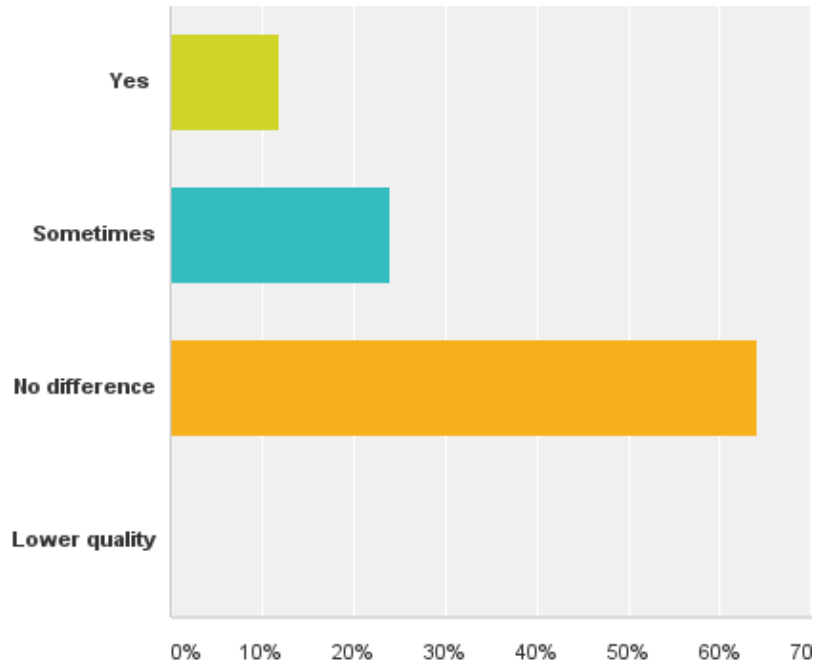
QU.4 - PERCEPTION OF QUALITY OF WOMEN'S COFFEE

**DO YOU HAVE A PERCEPTION THAT WOMEN'S COFFEE IS
GENERALLY HIGHER QUALITY THAN SPECIALTY GRADE?**

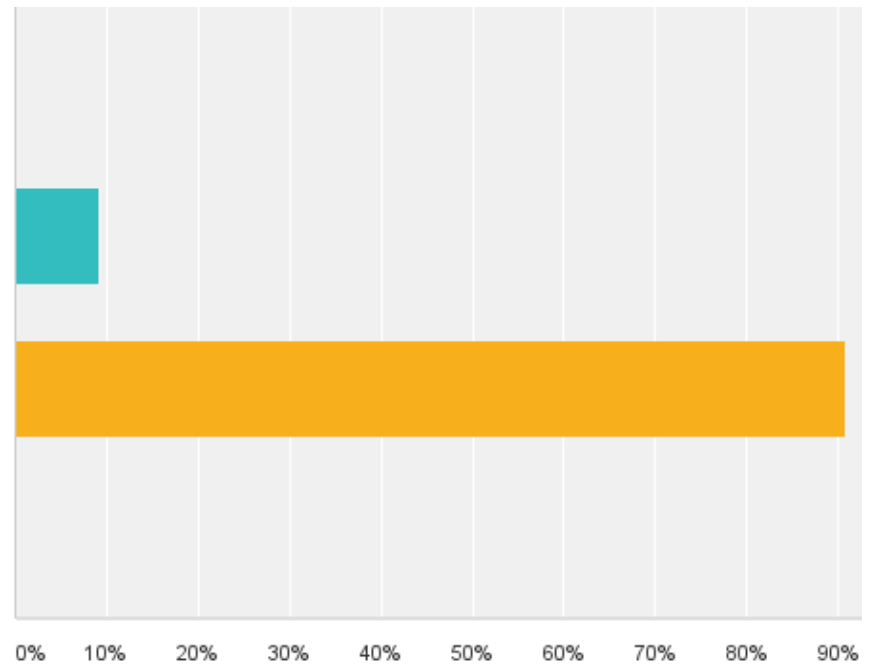
- Yes
- Sometimes
- No difference
- Lower quality



QU.4 - RESPONSES



US



Europe



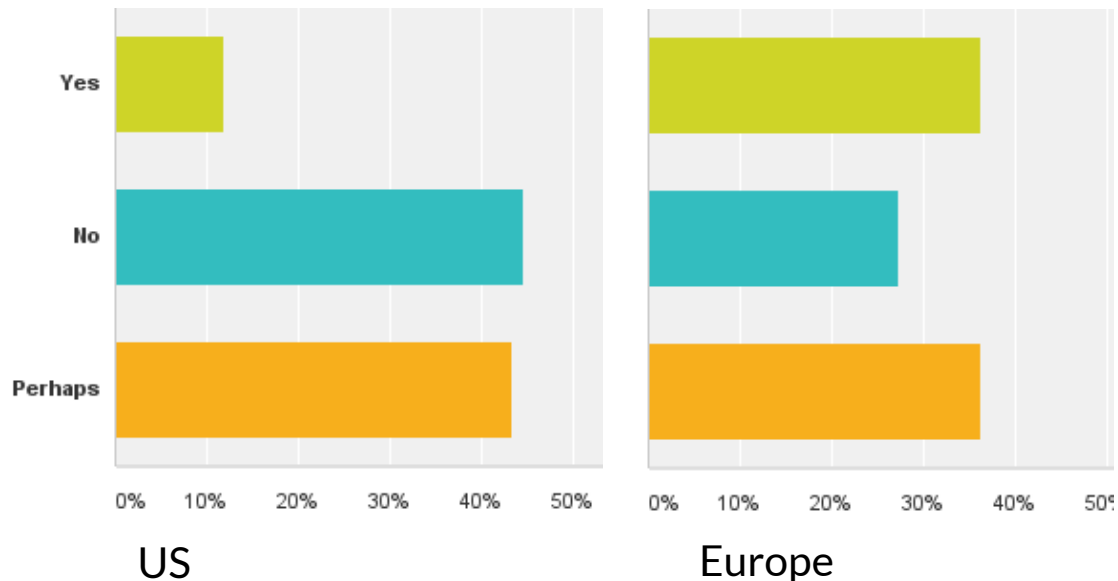
QU.5 - WOMEN'S COFFEE CERTIFICATION?

DO YOU THINK THAT WOMEN'S COFFEE SHOULD HAVE SPECIFIC PARAMETERS THROUGH A 3RD PARTY CERTIFICATION TO BE CLASSIFIED AS SUCH?

- Yes
- No
- Perhaps



QU.5 - RESPONSES



This question attracted a lot of comments, many of them raising concern that certification would increase cost and bureaucracy. Traceability was identified as crucial.

Additional responses: from Asia Pacific region, and those already buying Women's Coffee in Europe = 100% didn't want certification.



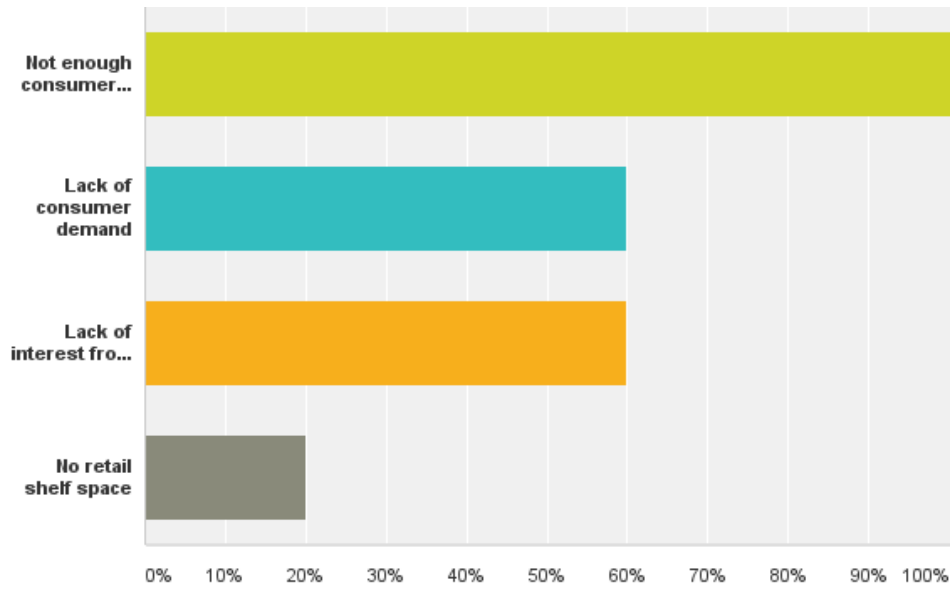
QU.6 - MAIN CHALLENGES IN THE MARKET

WHAT DO YOU THINK ARE THE BIGGEST HINDRANCES/CHALLENGES TO WOMEN'S COFFEE IN THE MARKETPLACE? PLEASE SELECT AS MANY ANSWERS AS RELEVANT

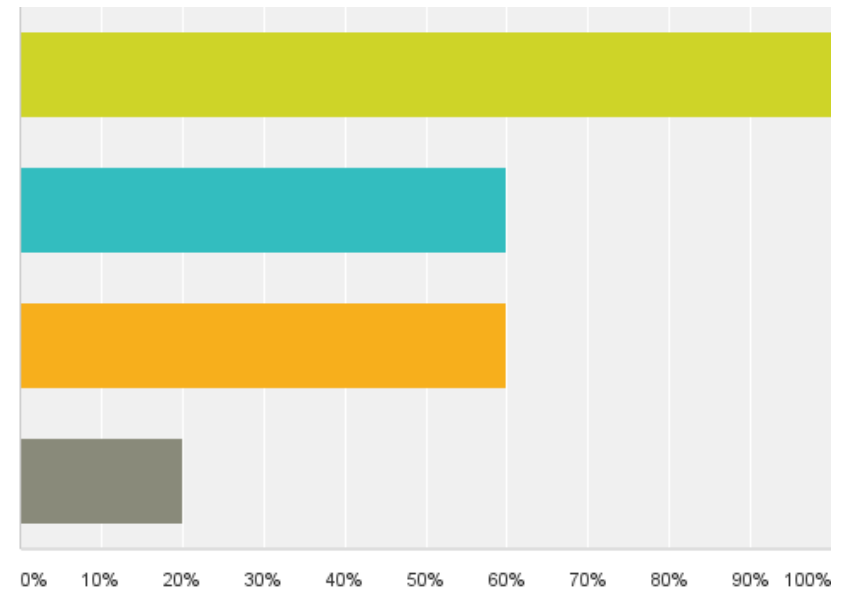
- Not enough consumer awareness
- Lack of consumer demand
- Lack of interest from our customers e.g. retailers, brands, roasters
- No retail shelf space



QU.6 - RESPONSES



US



Europe



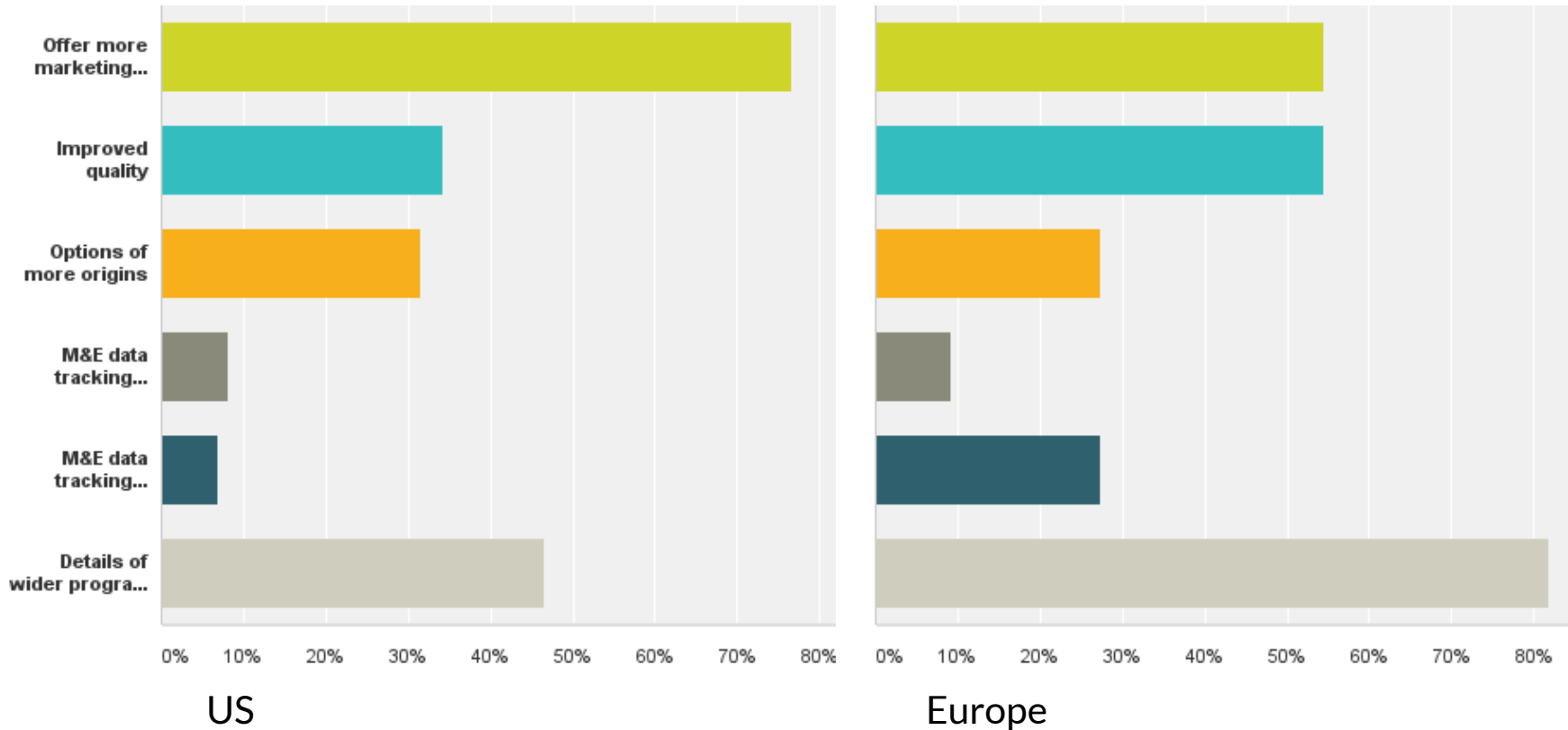
QU.7 - HELPING BUYERS TO PROMOTE WOMEN'S COFFEE

WHAT COULD BE DONE TO INCREASE YOUR INTEREST IN/HELP YOU TO PROMOTE WOMEN'S COFFEE?

- Offer more marketing materials to increase awareness e.g. Photos & stories of the women; benefits of premium
- Improved quality
- Options of more origins
- M&E data tracking productivity
- M&E data tracking household income
- Details of wider programme of work on gender justice



QU.7 RESPONSES



Of additional respondents who are already buying Women's Coffee both in the US and Europe, over 90% wanted additional marketing materials.