



Federal Ministry for the  
Environment, Nature Conservation,  
Building and Nuclear Safety

## **Corporate Social Responsibility-Communication at the Point of Sale**

- Summary of results -

# **1. Background and project structure**

## **2. Summary of results**

## **3. Progress in Germany**

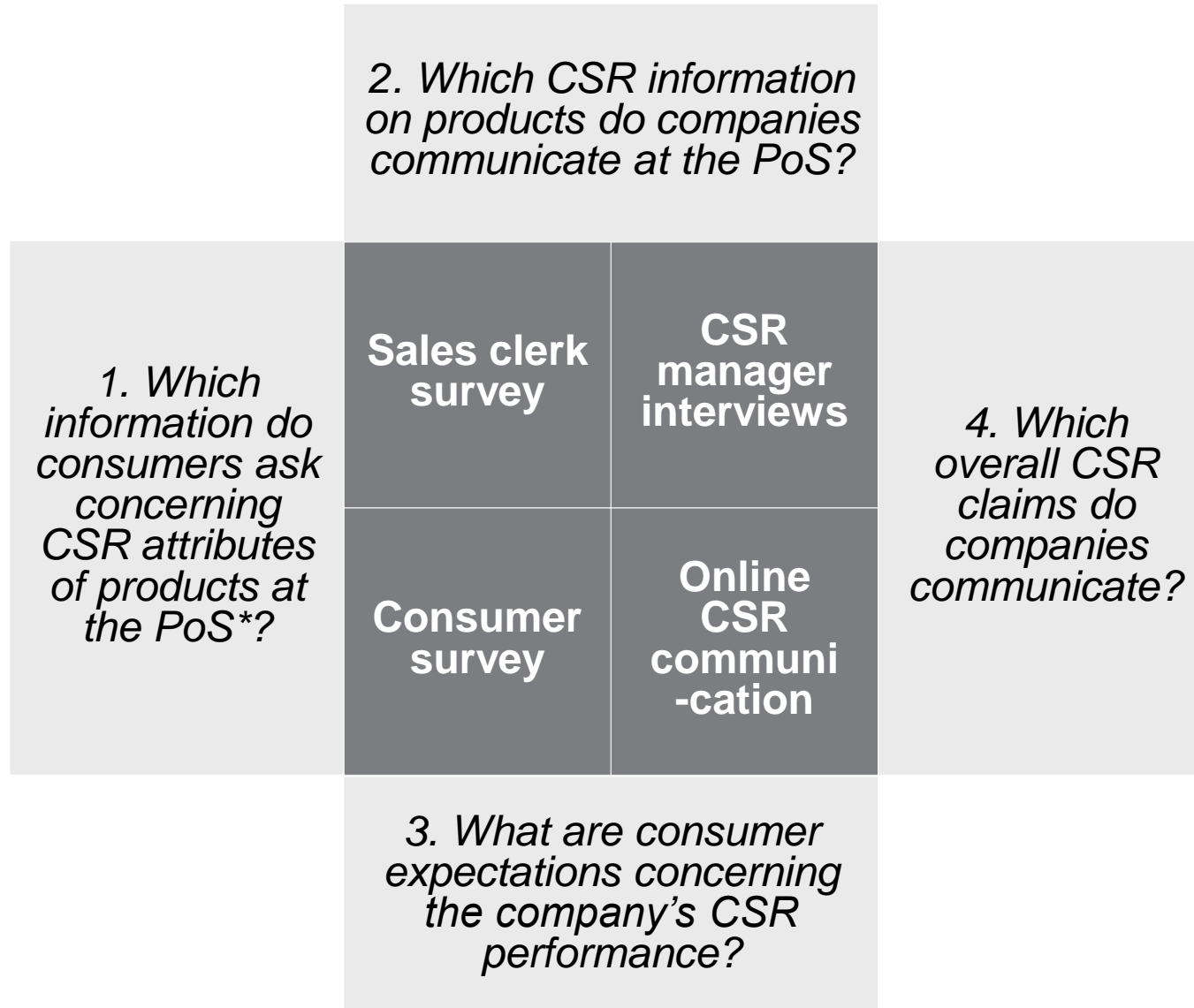
## **4. Consumer perspective**

# Background information

## CSR-Communication at Point of Sale (PoS)

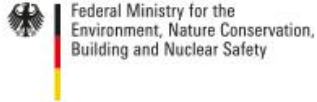
- Aim of the study, which was sponsored by the Federal Ministry for the Environment, Nature Conservation, Building and Nuclear Safety was to analyze the **status quo of CSR-communication** at the PoS and to **develop recommendations for improvement**:
  - to improve sales clerks' ability to provide information at the PoS, as well as
  - to raise customers' awareness for CSR issues.
- The results have been discussed at a **Multi-Stakeholder Workshop** in Berlin and will be summarized in a **manual**. The manual will also include best practice examples and recommendations for action.
- This year's study resumed and expanded on those studies conducted in 2010 and 2011 in Germany. It took into account the **fast food** (burger/sandwich), **food retail** (beef), and **textile** (jeans) retailers/ industries in **Germany, Poland, Portugal, Sweden** and the **UK**.
- During the study **customers'** and **sales clerks** have been interviewed at the PoS. Furthermore, **CSR-managers** have been interviewed via phone and the **CSR-communication at corporate level** has been analyzed as well.

# The study analyzed 4 perspectives



\*Point of sale

# Project management



## Federal Ministry for the Environment, Nature Conservation, Building and Nuclear Safety

*Sponsor*



## Schlange & Co. GmbH

- *Organization and analysis of customer and sales clerk surveys*
- *Analysis of CSR-communication at corporate level*
- *Conduction and analysis of CSR-manager interviews*
- *Development of recommendations*
- *Organization of a Multi-Stakeholder Workshops*
- *Development of a manual*
- *Project management*

### Germany



*Conduction of the survey*

### Great Britain



*Conduction of the survey*

### Poland



*Conduction of the survey*

### Portugal

One person

*Conduction of the survey*

### Sweden



*Conduction of the survey*

# Analyzed industries and companies in 2009/ 10 and 2011

## PoS I in 2009/ 10 in Germany

	Coffee shops	Food retailing industry	Fast food restaurants
Analyzed companies	   	  	  

## PoS II in 2011 in Germany

	Jewelry	Telecommunication	Textile industry
Analyzed companies	   	  	   

# Analyzed industries and companies in 2013/ 14

PoS III in 2013/ 14 in Germany, Great Britain, Poland, Portugal, and Sweden

	Textile industry	Food retailing industry	Fast food restaurants
Germany		 	
Sweden		 	
UK		 	
Poland		 	
Portugal		 	

# Survey in Germany

Partner: sneep



- **Number of interviews**

Customers:	384
Sales clerks:	192
Total:	576

- **Fast food:** McDonald's = 1.440 (2%)  
Subway = 591 (6%)

- **Beef:** real = 310 (9%)  
Rewe = 1.170 (3%)

- **Jeans:** H&M = 418 (6%)  
Zara = 71 (17%)



# Survey in Great Britain

Partner: Change Agents UK



## ▪ Number of interviews

Customers: 156  
Sales clerks: 78  
Total: 234

- **Fast food:** McDonald's = 1.208 (1%)  
Subway = 1.612 (1%)
- **Beef:** Sainsbury = 1.006 (1%)  
Tesco = 3.146 (<1%)
- **Jeans:** H&M = 245 (7%)  
Zara = 65 (12%)

# Survey in Poland

Partner: oikos Warsaw



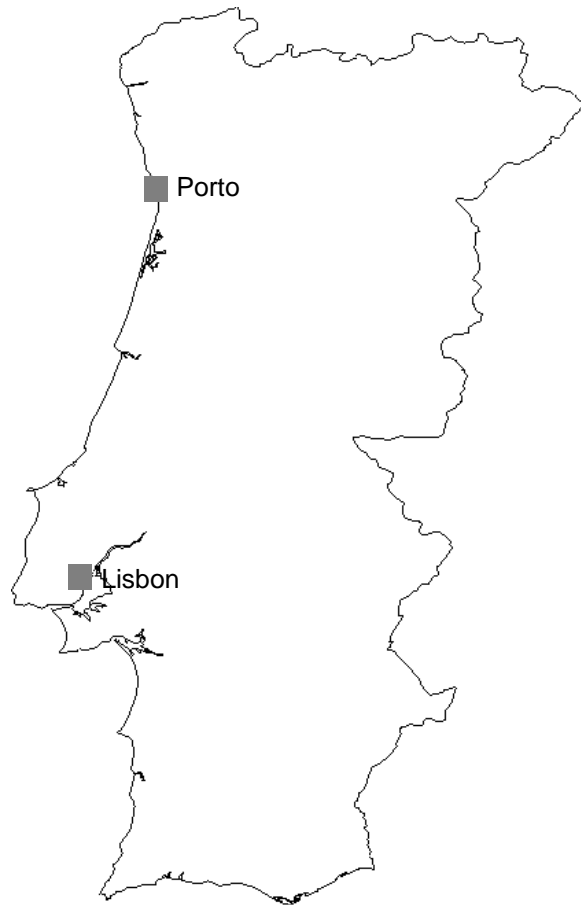
## ▪ Number of interviews

Customers: 108  
Sales clerks: 54  
Total: 162

- **Fast food:**
  - McDonald's = 301 (3%)
  - Subway = 83 (11%)
- **Beef:**
  - Carrefour = 542 (2%)
  - Tesco = 446 (2%)
- **Jeans:**
  - H&M = 122 (7%)
  - Zara = 44 (20%)

# Survey in Portugal

Partner: Single person



## ▪ Number of interviews

Customers: 108  
Sales clerks: 54  
Total: 162

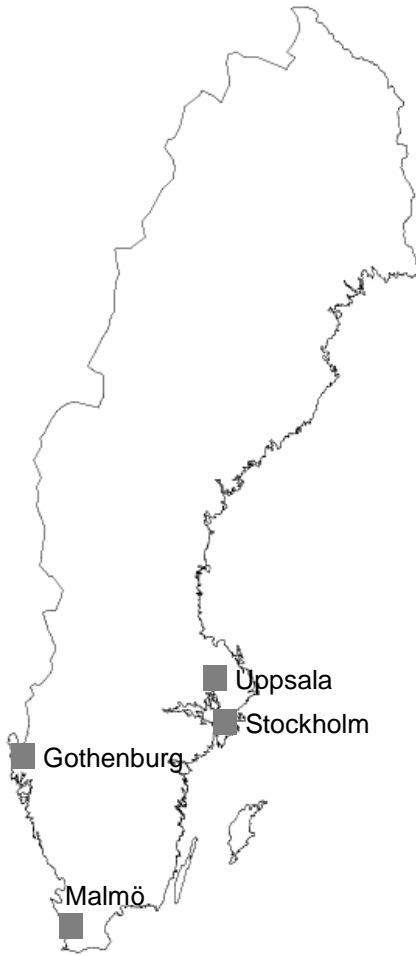
▪ **Fast food:** McDonald's = 138 (12%)  
Subway = 16 (31%)

▪ **Beef:** J. Martins = 371 (3%)  
Auchan = 32 (28%)

▪ **Jeans:** H&M = 27 (0%)  
Zara = 61 (21%)

# Survey in Sweden

Partner: Sustainergies



## ▪ Number of interviews

Customers: 108  
Sales clerks: 54  
Total: 162

- **Fast food:** McDonald's = 227 (3%)  
Subway = 131 (7%)
- **Beef:** ICA = 1.321 (1%)  
Coop = 702 (1%)
- **Jeans:** H&M = 177 (1%)  
Zara = 10 (10%)

## **1. Background and project structure**

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# Current status of CSR-Communication at Point of Sale

## Key findings (1/3)

### Companies (1/2)

1. The **participation rate** of sales clerks was above 50% although the survey was conducted during Christmas sale. Only one quarter of the sales clerks from the textile industry participated.
2. The CSR-communication of all companies was rated in the middle range
  - The **fast food restaurants** have similar results on corporate level. However, their results differ strongly at PoS.
  - The results on corporate level from the **food retailers** are not as good as the results from the other industries. However, their results are better at PoS.
  - The results from the **textile companies** on corporate level are very good. However, they received the worst results at PoS.

# Current status of CSR-Communication at Point of Sale

## Key findings (2/3)

### Companies (2/2)

3. The quality of responses for certain **topics** varies strongly between the analyzed companies. For some topics, the quality of responses is high or low for all companies.
4. The quality of responses does not differ considerably between the analyzed **countries**.
5. The companies sustainability aspiration on its own **sustainability performance** is higher than perceived by sales clerks internally and customers externally.
6. Not all sales clerks feel sufficiently informed about sustainability. Sales clerks who feel informed, have received **trainings** and information from the **internal CSR-communication**.

# Current status of CSR-Communication at Point of Sale

## Key findings (3/3)

### Customers

1. Customers **rarely** inform themselves about the sustainability of the products they buy.
2. Customers inform themselves only about some topics, e.g. **Labeling & Certification** (all industries), **Nutritional Value** (fast food), and **Origin of Meat** (food retailing).
3. Customer's interest in sustainability **varies slightly** between the analyzed countries.
4. Customers ask sales clerks **rarely** about the sustainability of the products<sup>^</sup>.
5. Customers prefer **sustainability information on packaging, at PoS/shelf or via media.**



# Issues addressed in PoS I - III

## Fresh meat (food retail)

<b>Origin of meat</b>	<b>Animal welfare</b>	<b>Environmental standards</b>	<b>Human rights</b>	<b>Hygiene in transport and processing</b>	<b>Antibiotics and hormones in feed</b>	<b>Use of certificates</b>
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## Hamburger/ sandwiches (fast-food)

<b>Origin of meat</b>	<b>Animal welfare</b>	<b>Environmental standards</b>	<b>Human rights</b>	<b>Hygiene in transport and processing</b>	<b>Antibiotics and hormones in feed</b>	<b>Waste reduction</b>	<b>Nutritional value</b>	<b>Use of certificates</b>
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## Jeans (textiles)

<b>Production site</b>	<b>Origin of cotton</b>	<b>Environmental effects of cotton growing</b>	<b>Chemicals in the production process</b>	<b>Environmental standards</b>	<b>Human rights</b>	<b>Harmful substances in the product</b>	<b>Use of certificates</b>
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# Approach for evaluating the quality of answers at the PoS

## Example fresh meat (food retail)

	Origin of meat	Animal welfare	Environmental standards	Human rights	Hygiene in transport and processing	Antibiotics and hormones in feed	Use of certificates
Response rate (in %) *	+	--	++	+	++	--	++
	82.9	45.7	88.6	80.0	88.6	45.7	91.4
Consistency of responses (in %) **	++	++	++	++	++	++	+
	(100.0)	(100.0)	100.0	100.0	96.8	93.8	84.4
Quality of responses							

### \* Evaluation of response rate at the PoS

- ++ = 100 – 88,5% response rate
- + = 88% – 75,5% response rate
- = 75 – 63% response rate
- = 62,5 – 0% response rate

### \*\* Evaluation of consistency of responses at the PoS

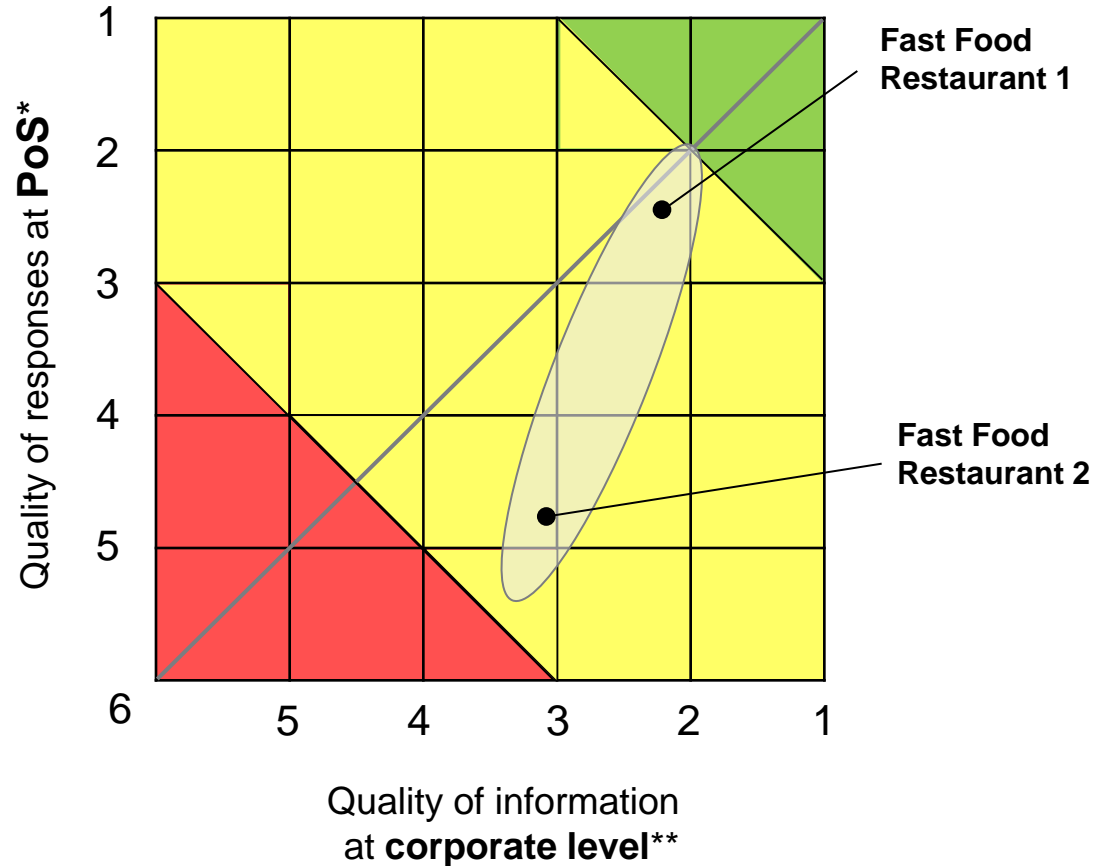
- ++ = 100 – 88,5% of answers are identical
- + = 88% – 75,5% of answers are identical
- = 75 – 63% of answers are identical
- = 62,5 – 0% of answers are identical

### \*\*\* Evaluation of communication at the PoS

- = Ability to respond is unsatisfactory (Note 6)
- = Ability to respond less satisfactory (grade 3)
- = Ability to respond satisfactory (grade 1)

# CSR-Communication: PoS vs. Corporate Level

## The fast food industry – all countries



\*Quality of responses at PoS:

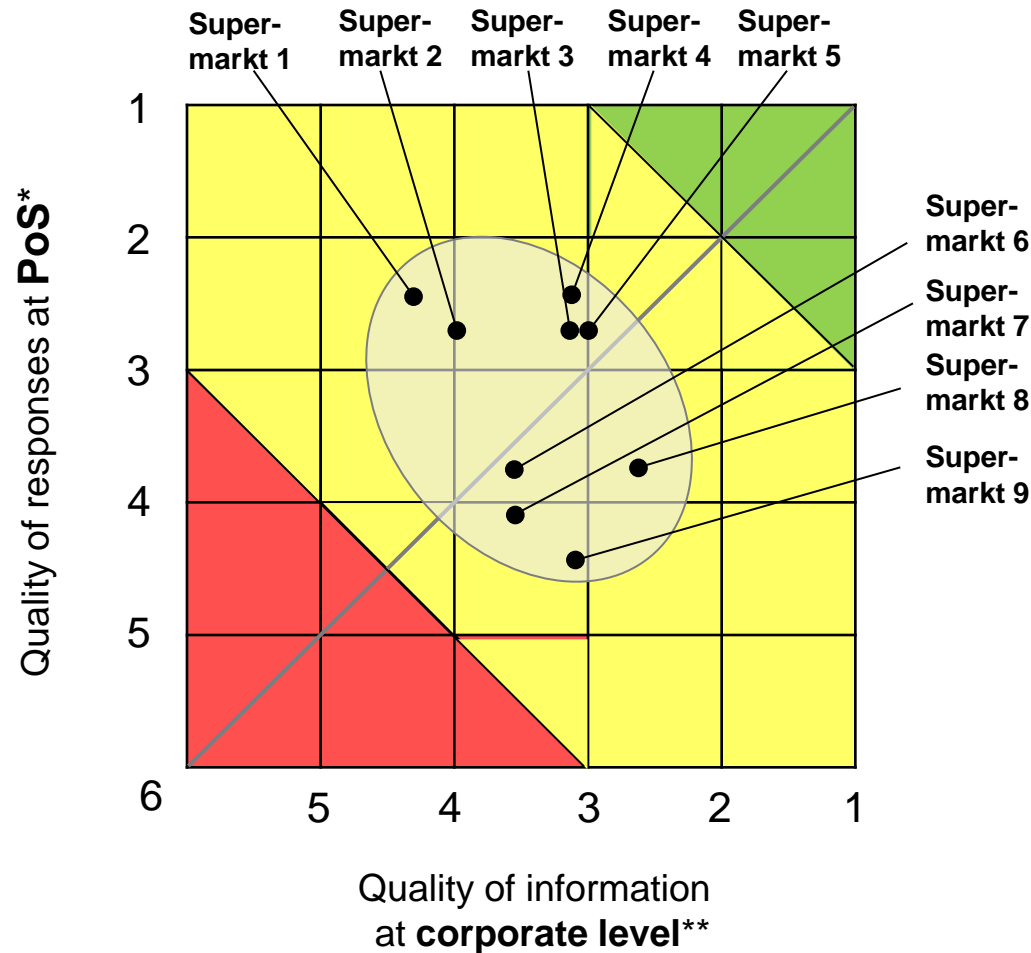
- 1 = Very high
- 2 = High
- 3 = Satisfactory
- 4 = Sufficient
- 5 = Deficient
- 6 = Very low

\*\*Quality of information at corporate level:

- 1 = Very high
- 2 = High
- 3 = Satisfactory
- 4 = Sufficient
- 5 = Deficient
- 6 = Very low

# CSR-Communication: PoS vs. Corporate Level

## The food retailing industry – all countries



\*Quality of responses at PoS:

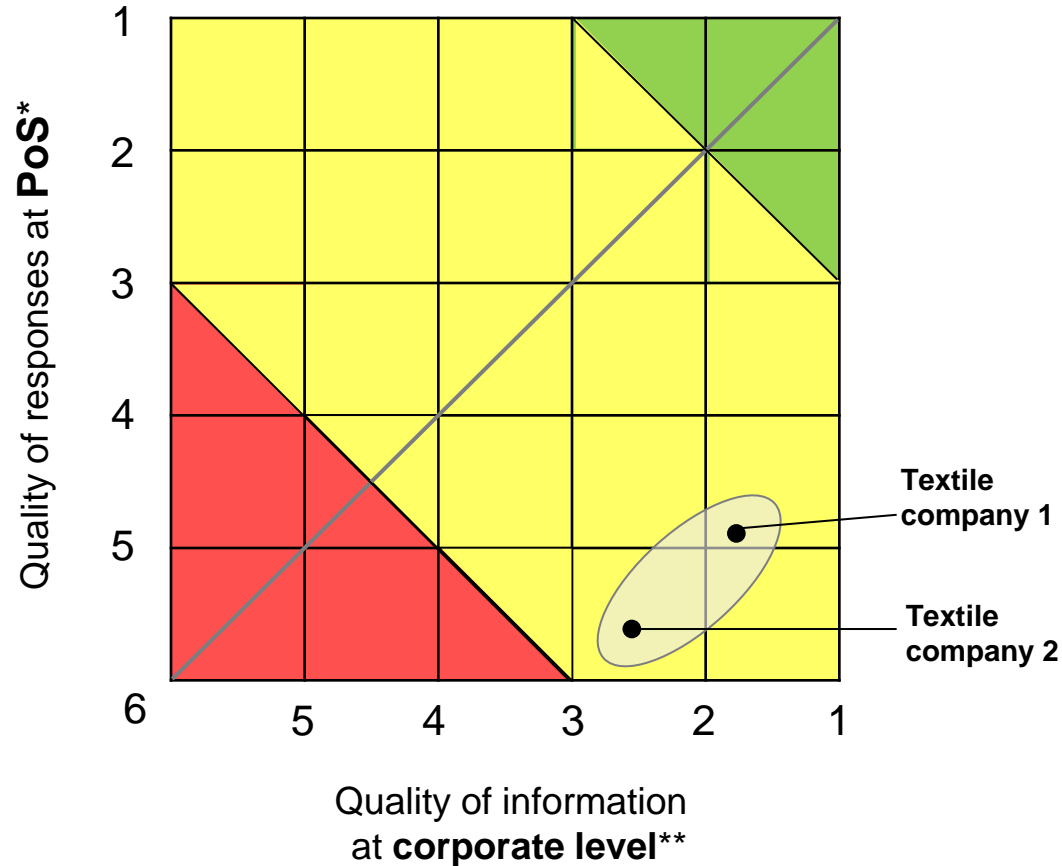
- 1 = Very high
- 2 = High
- 3 = Satisfactory
- 4 = Sufficient
- 5 = Deficient
- 6 = Very low

\*\*Quality of information at corporate level:

- 1 = Very high
- 2 = High
- 3 = Satisfactory
- 4 = Sufficient
- 5 = Deficient
- 6 = Very low

# CSR-Communication: PoS vs. Corporate Level

## The textile industry – all countries



\*Quality of responses at PoS:

- 1 = Very high
- 2 = High
- 3 = Satisfactory
- 4 = Sufficient
- 5 = Deficient
- 6 = Very low

\*\*Quality of information at corporate level:

- 1 = Very high
- 2 = High
- 3 = Satisfactory
- 4 = Sufficient
- 5 = Deficient
- 6 = Very low

# Quality of information provided at PoS level

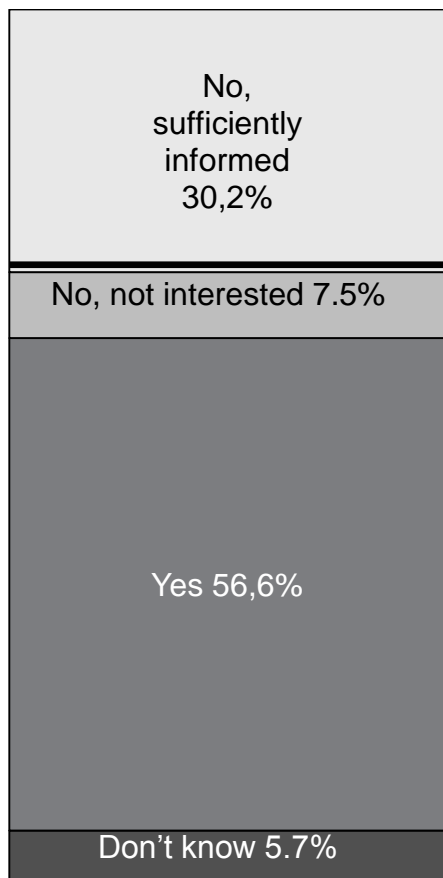
Issue	Food retail									Fast-food		Textil	
	Food retail 1	Food retail 2	Food retail 3	Food retail 4	Food retail 5	Food retail 6	Food retail 7	Food retail 8	Food retail 9	Fast-food 1	Fast-food 2	Textil 1	Textil 2
Origin of meat	High	High	High	High	High	High	High	High	High	Medium	Low	Diagonal	Diagonal
Animal welfare	Low	Low	Low	Medium	Low	Low	Low	Low	Low	High	Medium	Diagonal	Diagonal
Production site	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Medium	Low
Origin of cotton	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Low	Low
Environmental effects of cotton growing	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Low	Low
Chemicals in the production process	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Low	Low
Environmental standards	Medium	Medium	High	Medium	Low	High	High	Medium	Medium	Medium	Low	Medium	Low
Human rights	High	High	High	Low	Medium	Medium	Low	Medium	Medium	Medium	Low	Medium	Medium
Hygiene in transport and processing	High	High	High	Low	Low	High	High	Low	Low	High	Medium	Diagonal	Diagonal
Antibiotics and hormones in feed	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Diagonal	Diagonal
Waste reduction	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	High	Medium	Diagonal	Diagonal
Nutritional value	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	High	Medium	Diagonal	Diagonal
Harmful substances in the product	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Diagonal	Low	Medium
Use of certificates	High	High	High	High	Medium	High	High	High	High	Medium	Low	Low	Medium

■ low   
 ■ medium   
 ■ high

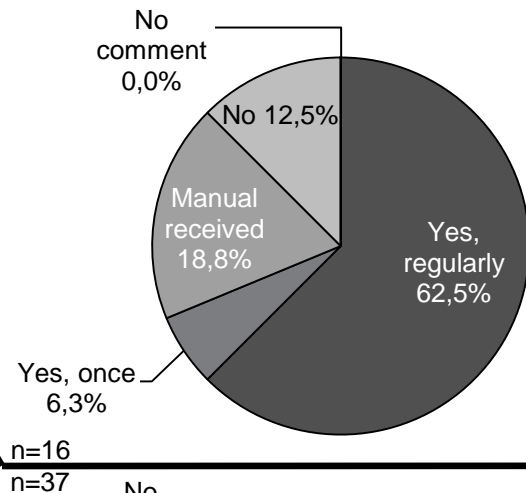
Source: Schlange & Co.

# Sufficiently informed sales clerks have received trainings (Example)

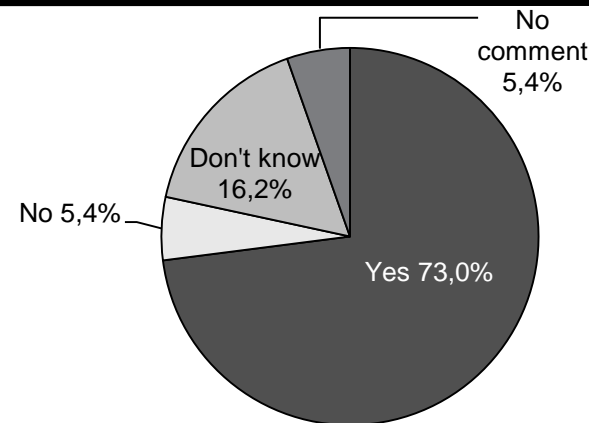
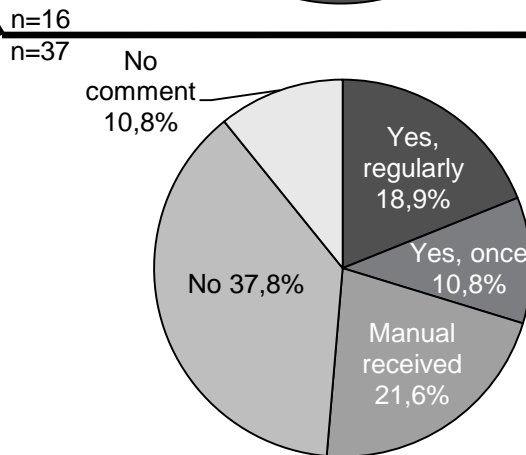
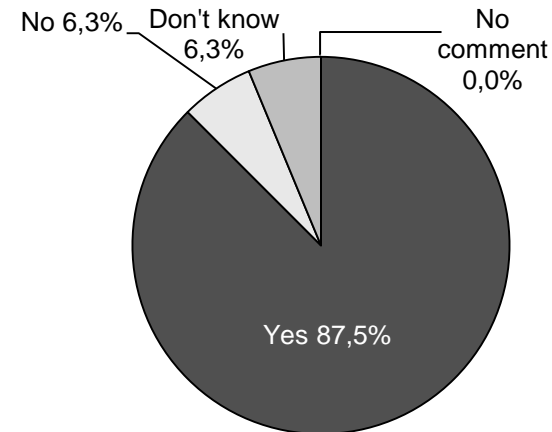
Additional information on sustainability appreciated  
(n=53\*)



Trainings received




Internal CSR communication perceived



\*Excluding "no comment"

# Quality of information provided at company level

Issue	 Food retail 1   Food retail 2   Food retail 3   Food retail 4   Food retail 5   Food retail 6   Food retail 7   Food retail 8   Food retail 9									 Fast-food 1   Fast-food 2		 Textile 1   Textile 2	
	Origin of meat	Low	High	High	Medium	Low	High	Low	Low	High	High	Medium	Medium
Animal welfare	High	Low	Medium	Medium	Medium	Low	Low	High	Medium	Medium	Medium	Medium	Medium
Production site	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Origin of cotton	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Low
Environmental effects of cotton growing	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	Medium
Chemicals in the production process	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High
Environmental standards	High	Medium	Medium	High	Medium	High	Medium	Medium	Medium	Medium	Medium	High	Medium
Human rights	High	Medium	Medium	High	High	High	Medium	Medium	Medium	High	High	High	High
Hygiene in transport and processing	Medium	Medium	Medium	Medium	Medium	High	Medium	Medium	Low	Medium	Medium	Medium	Medium
Antibiotics and hormones in feed	Medium	Low	Low	High	Medium	Low	Medium	Medium	Medium	High	High	Medium	Medium
Waste reduction	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium
Nutritional value	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	Medium	Medium
Harmful substances in the product	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High
Use of certificates	Low	Low	Medium	Low	Medium	Low	Low	Low	Low	Low	Low	Medium	Medium

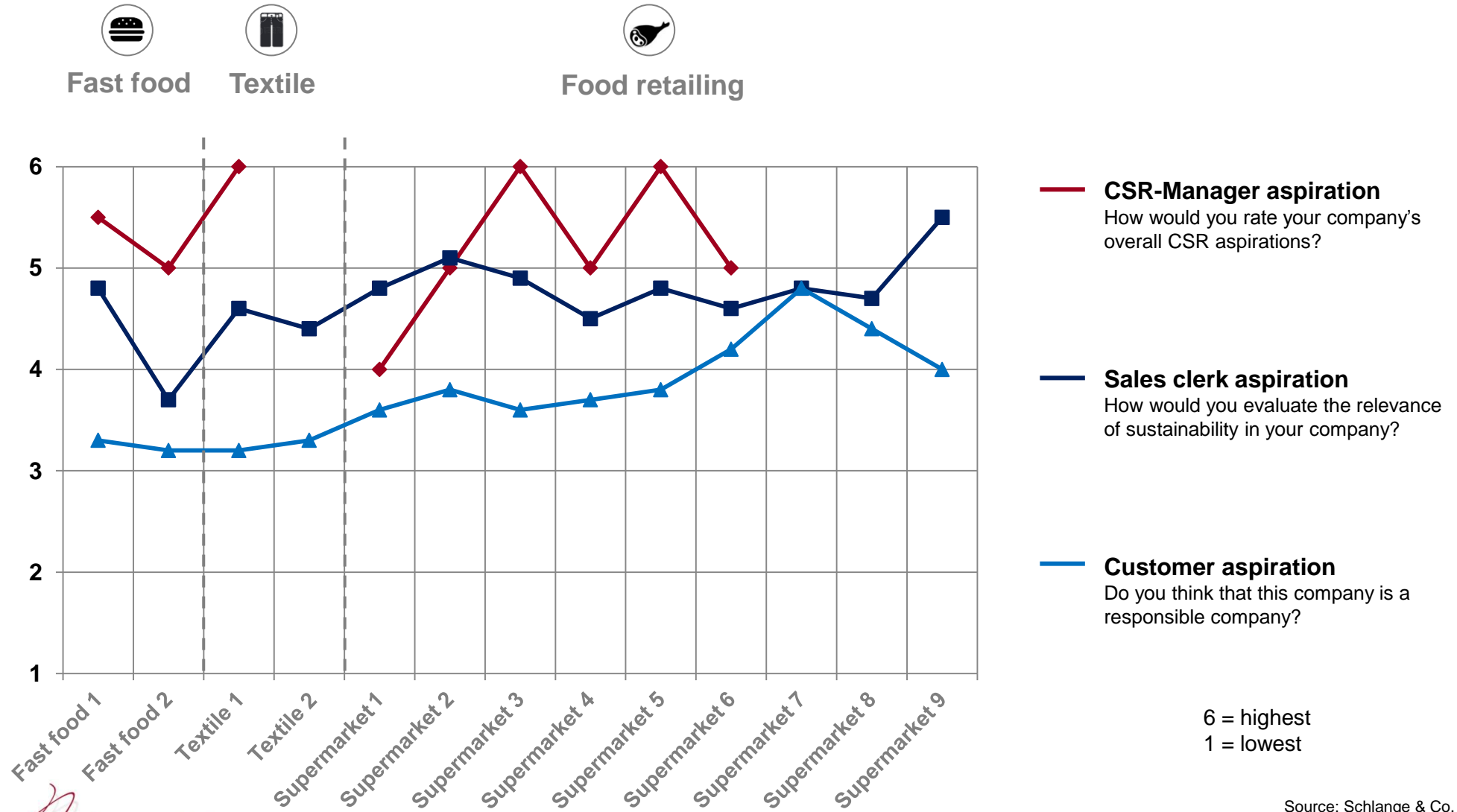
■ low  
 ■ medium  
 ■ high

Source: Schlange & Co.



# Comparison of sustainability aspiration

## CSR-Manager, sales clerk and customer



**1. Background and project structure**

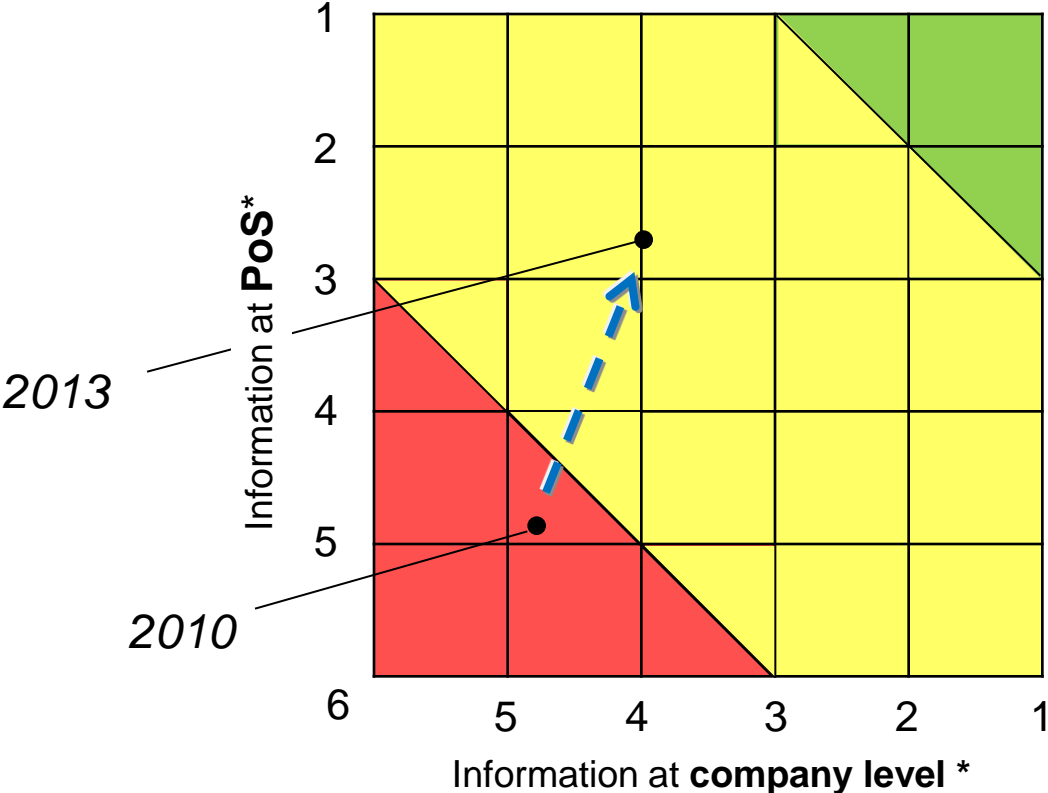
**2. Summary of results**

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# CSR communication: Development over time in Germany

Fresh meat – retailer 1

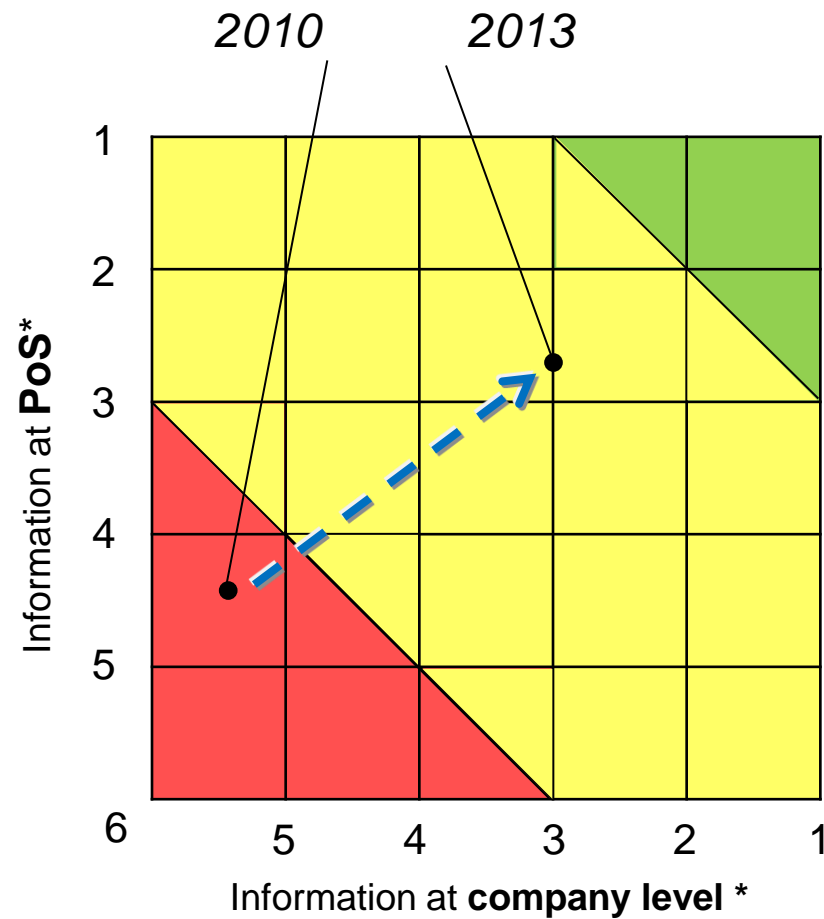


\* scale

- 1 = very good
- 2 = good
- 3 = satisfactory
- 4 = sufficient
- 5 = poor
- 6 = insufficient

# CSR communication: Development over time in Germany

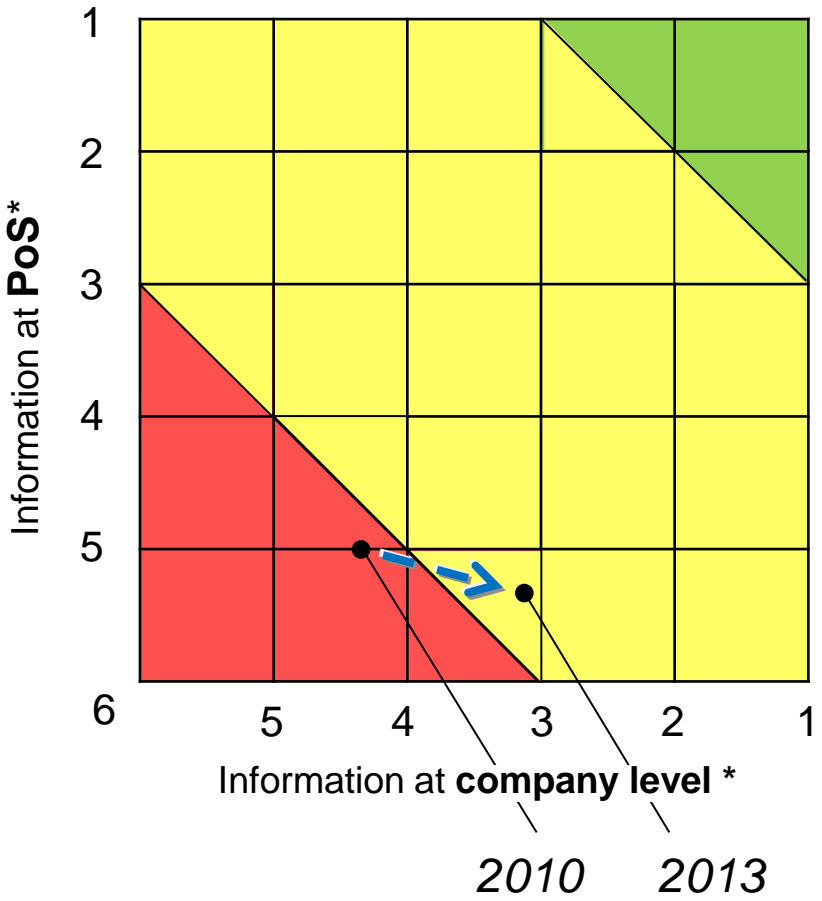
## Fresh meat – retailer 2



\* scale

- 1 = very good
- 2 = good
- 3 = satisfactory
- 4 = sufficient
- 5 = poor
- 6 = insufficient

# CSR communication: Development over time in Germany

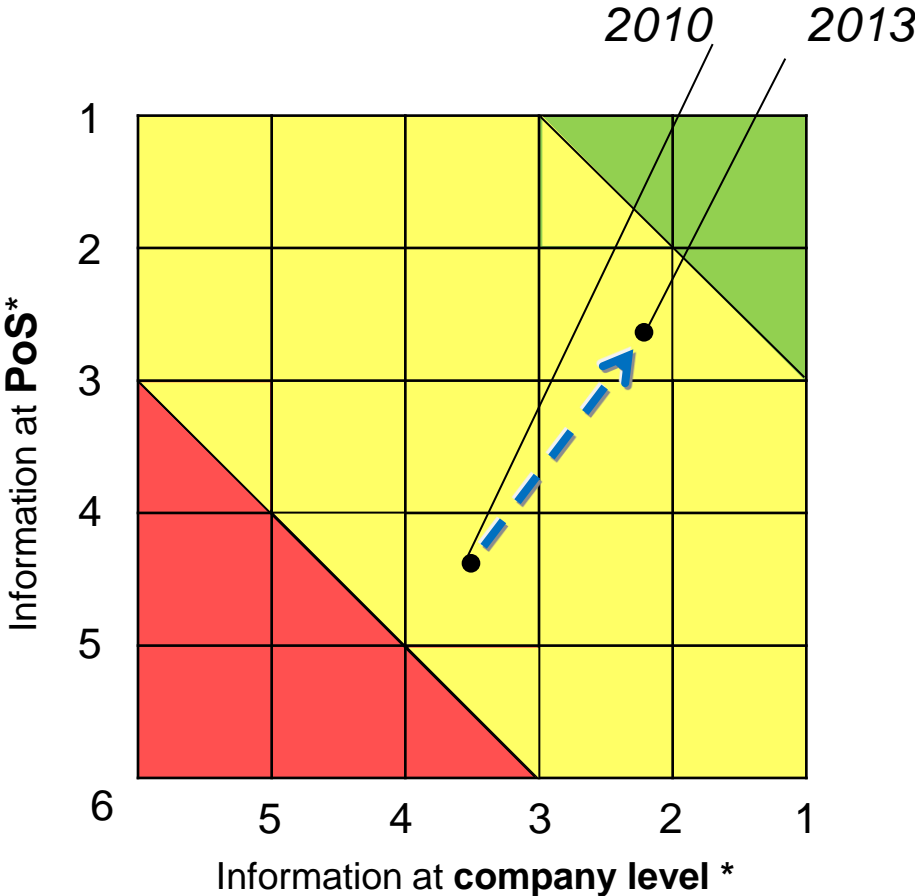


\* scale  
 1 = very good  
 2 = good  
 3 = satisfactory  
 4 = sufficient  
 5 = poor  
 6 = insufficient

**Fast-food 1**

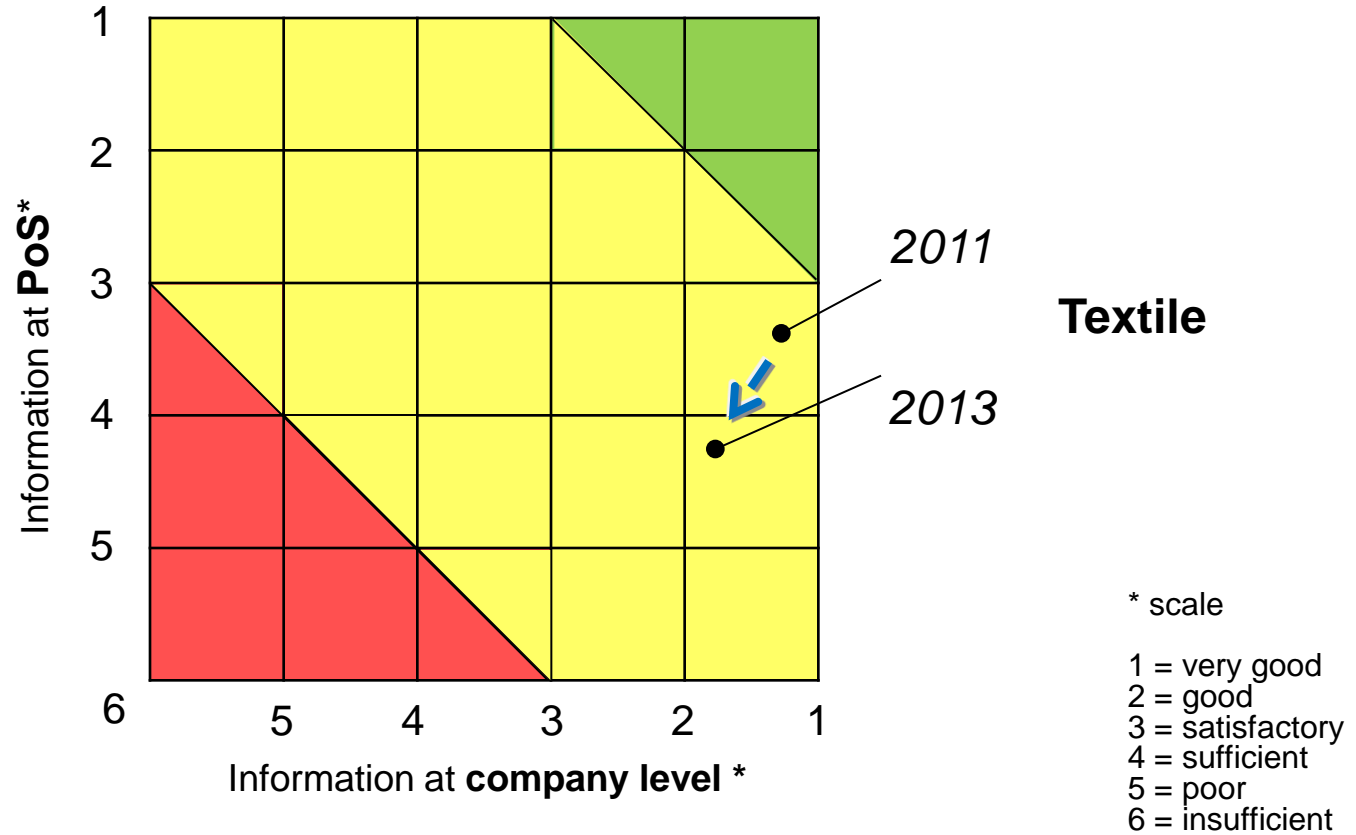
# CSR communication: Development over time in Germany

## Fast-food 2



\* scale  
 1 = very good  
 2 = good  
 3 = satisfactory  
 4 = sufficient  
 5 = poor  
 6 = insufficient

# CSR communication: Development over time in Germany



**1. Background and project structure**

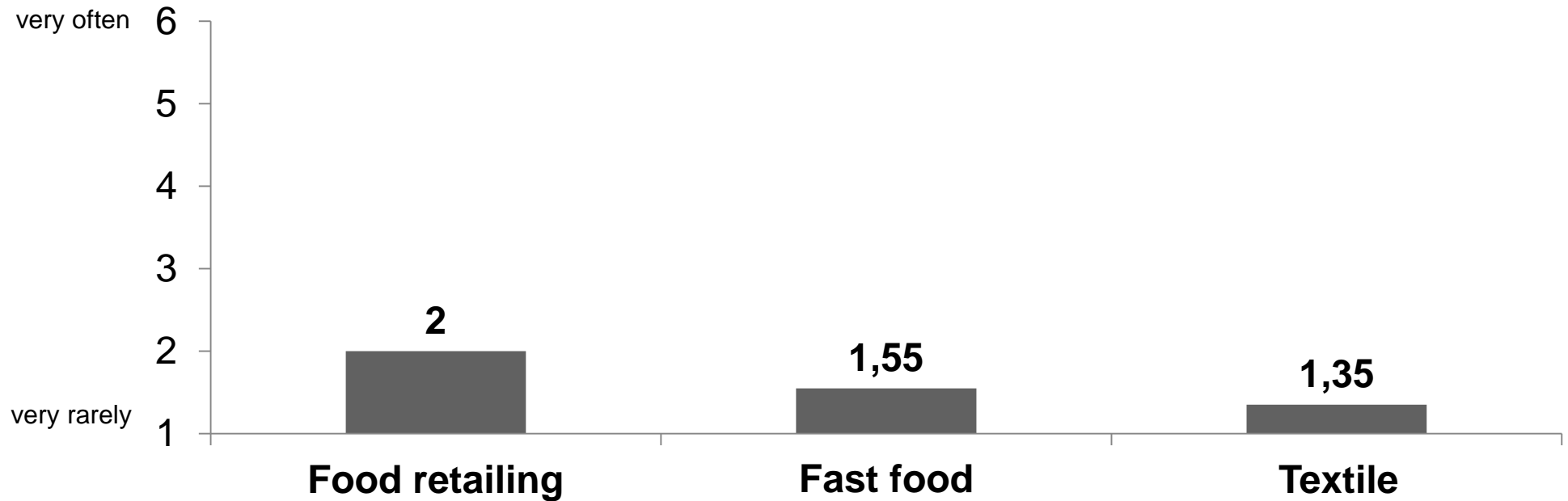
**2. Summary of results**

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# Customers rarely ask sales clerks about sustainability topics




„Die Käufer interessiert es einfach nicht. Wir wissen Bescheid und können die Käufer informieren.“

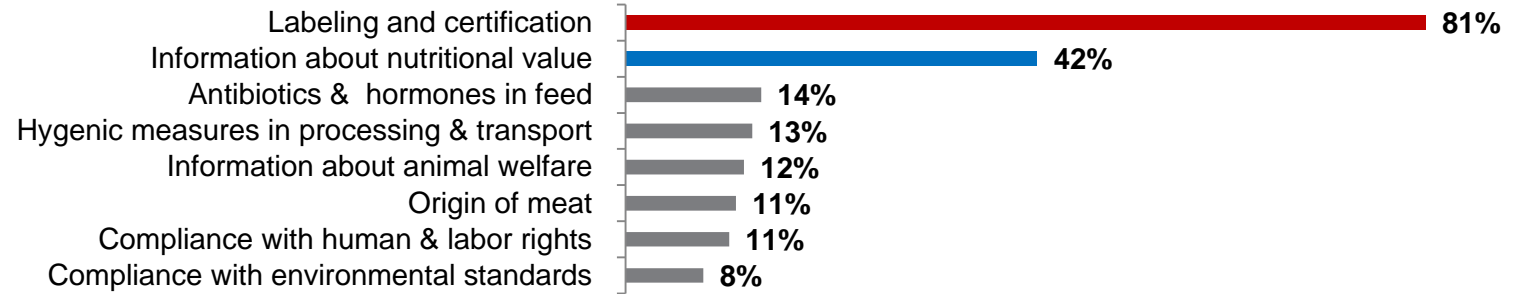



„Man kann das nie wissen, es bringt auch nichts, die Verkäufer zu fragen, die wissen es auch nicht oder wollen es nicht sagen.“

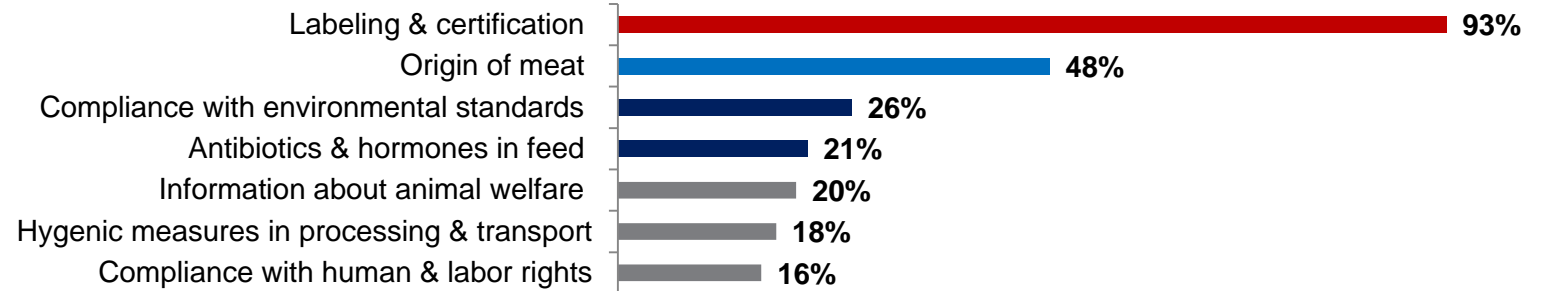



# Customers first look for labels/ certificates and only thereafter, if at all, for particular product and process information

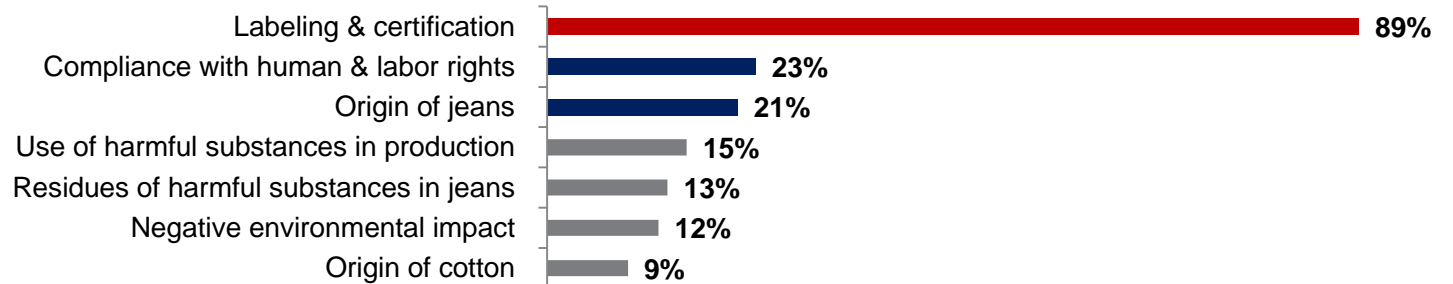
  
Fast food  
Hamburger/  
Sandwiches



  
Food  
retailing  
Beef



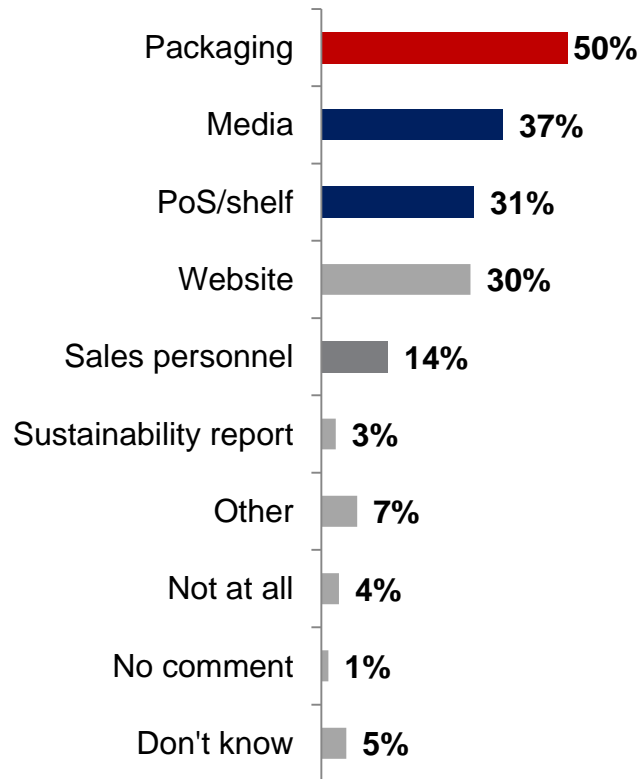
  
Textile  
Jeans



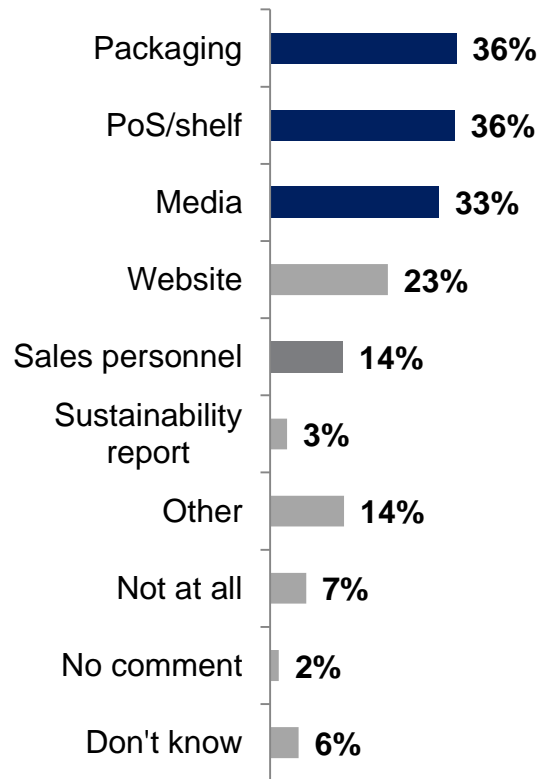
# Customers prefer product related CSR information via packaging, PoS/ shelf and media



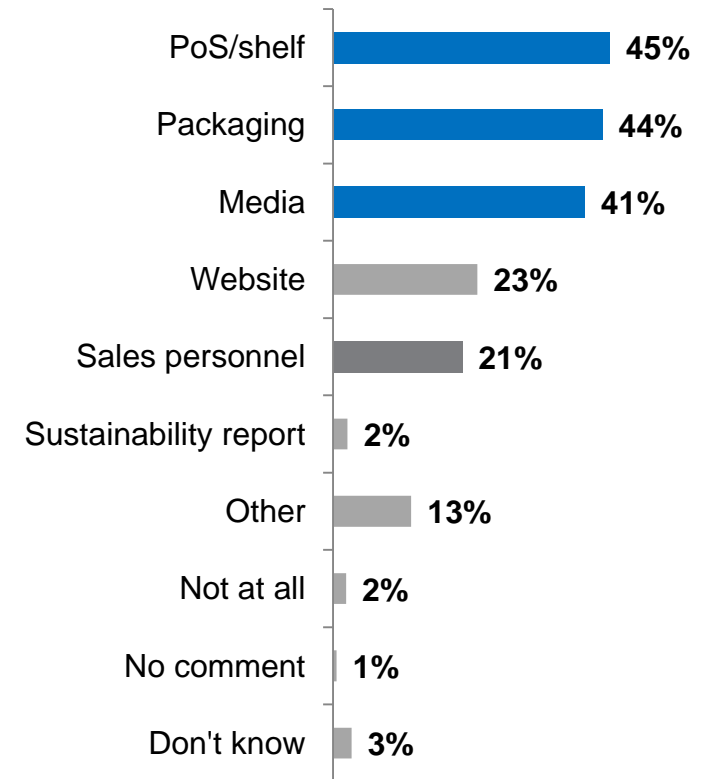
## Textile




## Fast food





## Food retailing





# Customer quotes: Interest in sustainability


„Solange das Fleisch gut schmeckt, ist mir das egal.“ 


„Wer kümmert sich schon um Menschenrechte beim Kauf von Fleisch? Wenn man sich bei jedem Produkt, das man kauft, alle Informationen zusammensammeln muss, geht das nicht.“ 


„Die Einhaltung von Menschen- und Arbeitsrechten und Umweltstandards bei der Jeansproduktion interessiert mich ehrlich gesagt nicht. Wenn die Jeans ein Zertifikat hätten, würde man vielleicht bewusster auf solche Themen achten.“ 

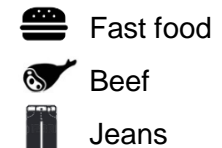
„Die Käufer interessiert es einfach nicht. Wir wissen Bescheid und können die Käufer informieren.“  
Verkäufer 

„Zertifizierungen bringen  doch eh nichts.“

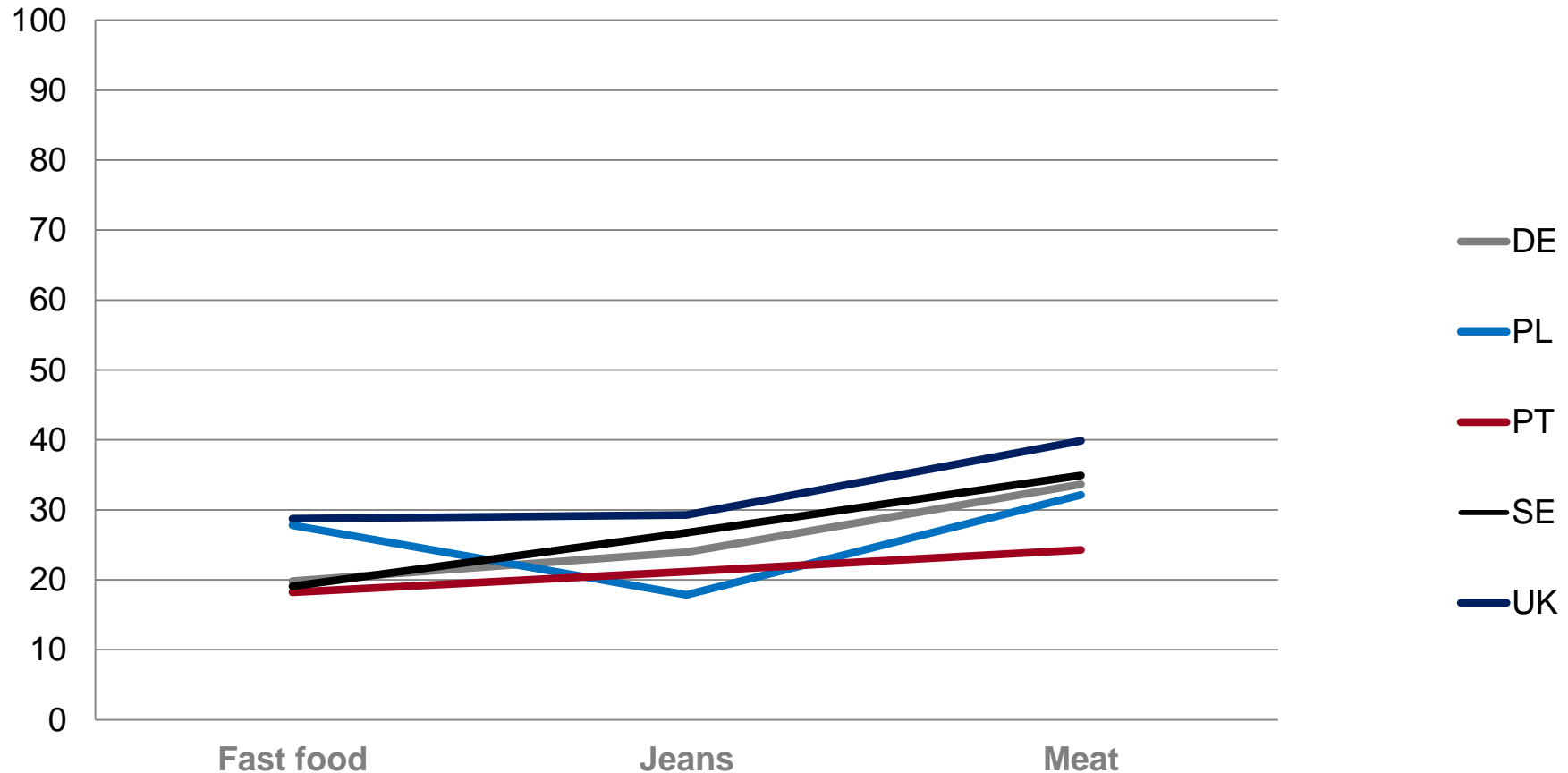
„Es ist mir nicht egal wo meine Jeans herkommt, aber manchmal brauche ich einfach nur eine Jeans und denke nicht an Nachhaltigkeit.“ 

„I would like to have more info but don't look for it or think about it myself.“ 

„Labels informing about differences to other fast food companies would be very helpful.“ 



# Customer interest varies slightly between the analyzed countries



Customers could reach 100 points if they indicated interest in all analyzed sustainability topics.

Joachim Schlange

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