CONSUMER RESEARCH

Investigating consumers, their attitudes, behaviours and understanding of organic
Identifying barriers, challenges and opportunities

Key findings

In collaboration with

With the contribution of

Consumer Survey Results – first release

An in-depth investigation of the organic consumer and prospective organic markets

ORGANIC RESEARCH CENTRE

UK ORGANIC

organicresearchcentre.com

Review findings 2022-23

"**Lack of cooking skills** for transforming fresh organic produce into meals, little availability of organic ready-made meals"

"Right messaging around the organic brand for climate-conscious shoppers – **environmental consciousness is seen as a stronger indicator than income**"

"Organic stands out as an **affordable, transparent option** when people have low confidence in the food and drink sector"

"Organic leads in the willingness to pay rankings, followed by other labels associated with social and ecological benefits (e.g. fairtrade)"

"Uncertain how well the principles of organic production are understood by broader British population – **difficult to justify price premium**"

"Increasing **greenwashing** in the food industry is creating confusion"

"A **fear of new food** (or forgotten food) that shoppers are less familiar with can be a barrier"

"**Positive health associations** with organic brand is present and people are willing to pay for it"

Survey background and objectives

Aims:

- A more in-depth understanding of how shoppers are engaging with organic
- To support organic retailers and advocacy groups with marketing and messaging decisions
- To build on existing research

Specifically:

- Looking at the differences between organic actives and organic considerer
- Identify which messaging appeals to which subgroups and on which platforms
- Identify key fringe markets to bring into regular organic shopping

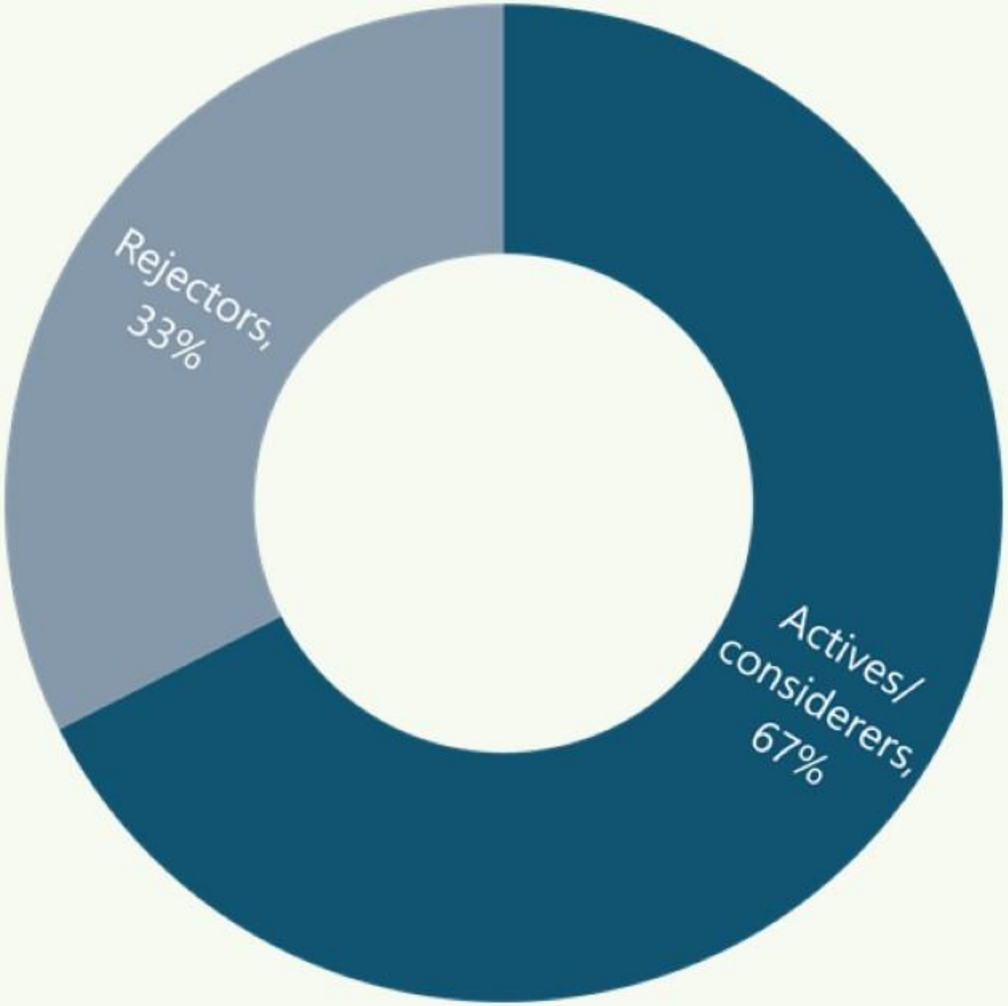
Survey approach

Structure:

- Quantitative survey, N=2000 - respondents over the age of 18.
- Results gathered in the last 2 weeks of January 2024.
- Utilising Statista panel of approx. 70,000 UK respondents.

Questions:

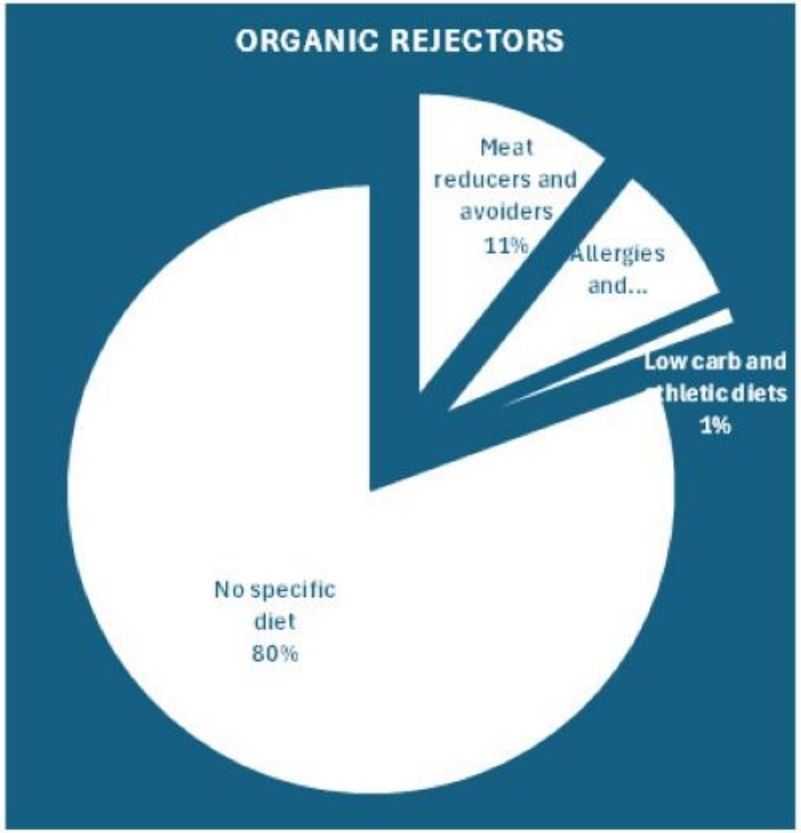
- Aim for UK representation according to income, gender, ethnicity, region, and employment status.
- 6 questions targeting shopping behaviour.
- 2 pivotal questions about engagement with organic products.
- 2 questions covering motivations and barriers when buying organic.
- 2 questions covering general shopping preferences and sources of information.

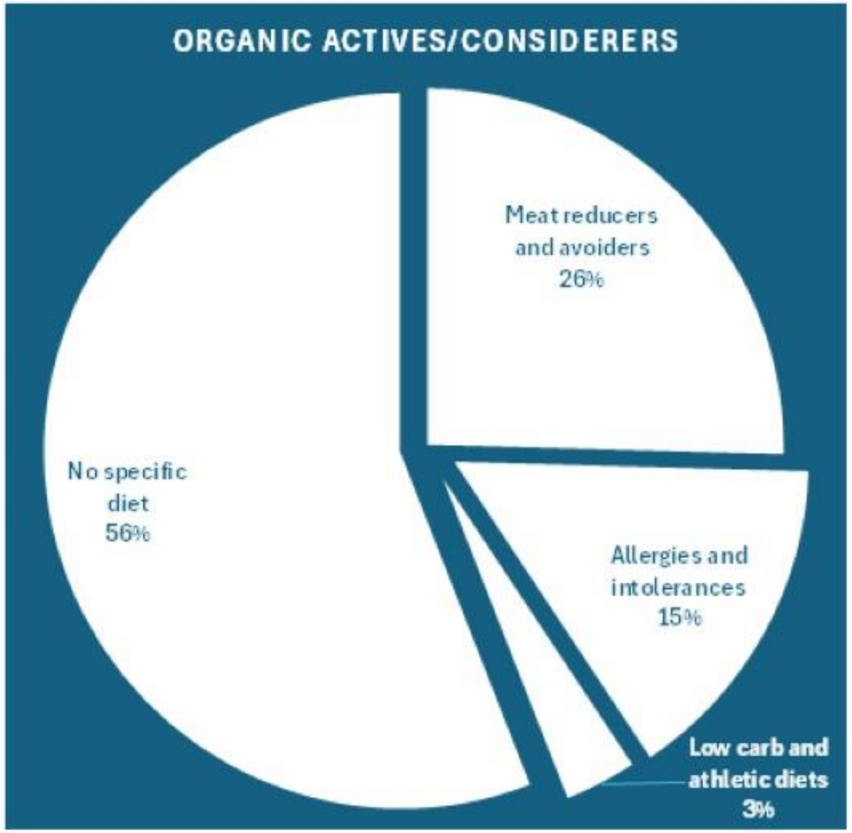

Rejectors, 33%
Actives/ considerers, 67%

The organic market drivers - variety

- More active online market
- Consistently shop in a variety of locations:
  - 1 in 5 organic shoppers use refill stores
  - Over half of organic shoppers also shop with independents
  - About a third of organic shoppers go to street markets, farmers markets and farm shops

The organic market drivers - diet





The organic market drivers - engagement

- 52% of rejectors rarely look to learn more about food (e.g., less than once a month)
    - Compared to 21% of organic actives and considers

- 40% of rejectors were not interested in finding out more about organic products
    - While 46% of organic actives and considers felt they understood what organic products, and a further 31% of buyers were looking to learn more about organic products

- Organic actives and considerers were twice as likely as rejectors to have a passion for cooking and prioritise top quality ingredients.

The organic market drivers - engagement

Motivations for buying organic

- Organic production excludes the use of synthetic pesticides and other harmful chemicals, 73%
- Organic means higher production standards (e.g., around animal welfare) are used, 69%
- Organic foods have more nutrients and are healthier for me and my family, 68%
- Organic products are better quality, 67%
- Organic products are less polluting to the environment, 66%
- Organic farming prohibits the routine use of antibiotics, 65%
- Organic farms have healthier soils which store more carbon, 63%
- Organic products taste better, 61%

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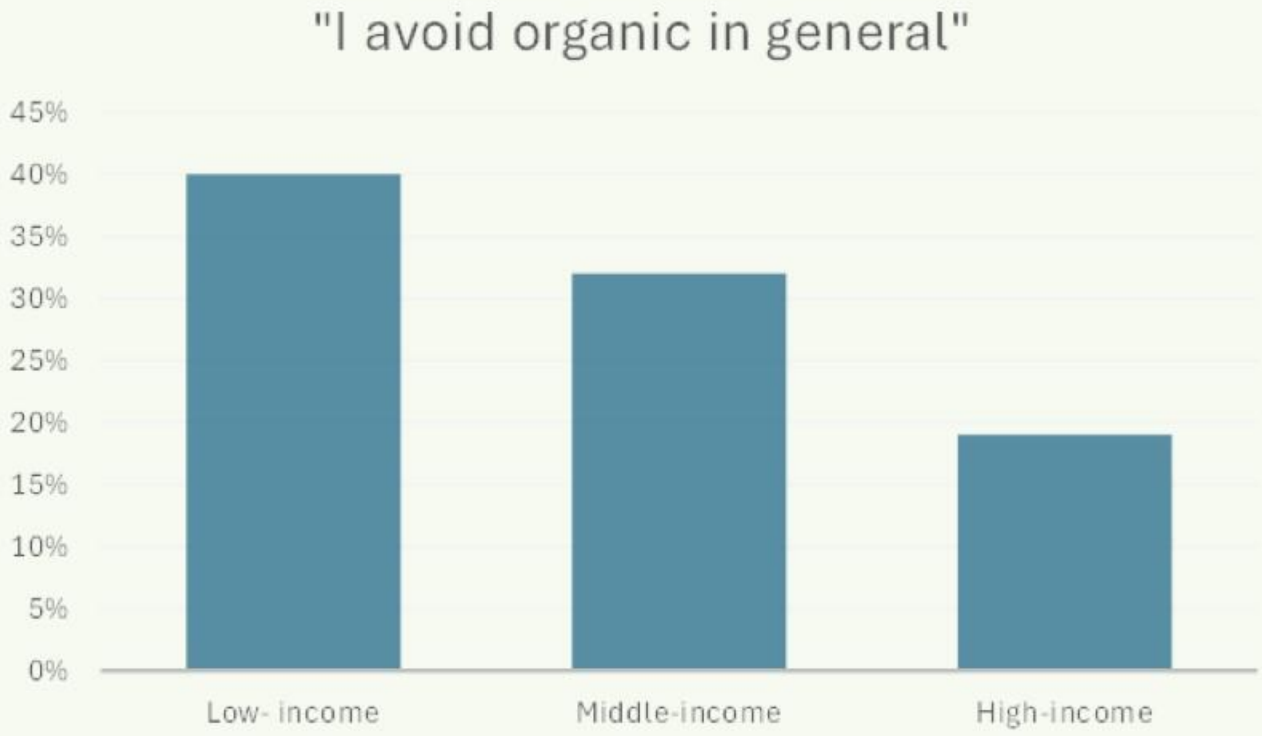
By product

Top performers – most active shoppers	Opportunities – most considers	Challenges – most reducers (in the last 2 years)
Vegetables Fruit Dairy Red Meat White Meat	Supplements and wellbeing products Skincare and toiletries Chocolate and confectionary Pre/part cooked or prepared goods (ready meals, pre-seasoned, pre-sliced)	Soft drinks Clothing Textiles

Income is still a significant factor



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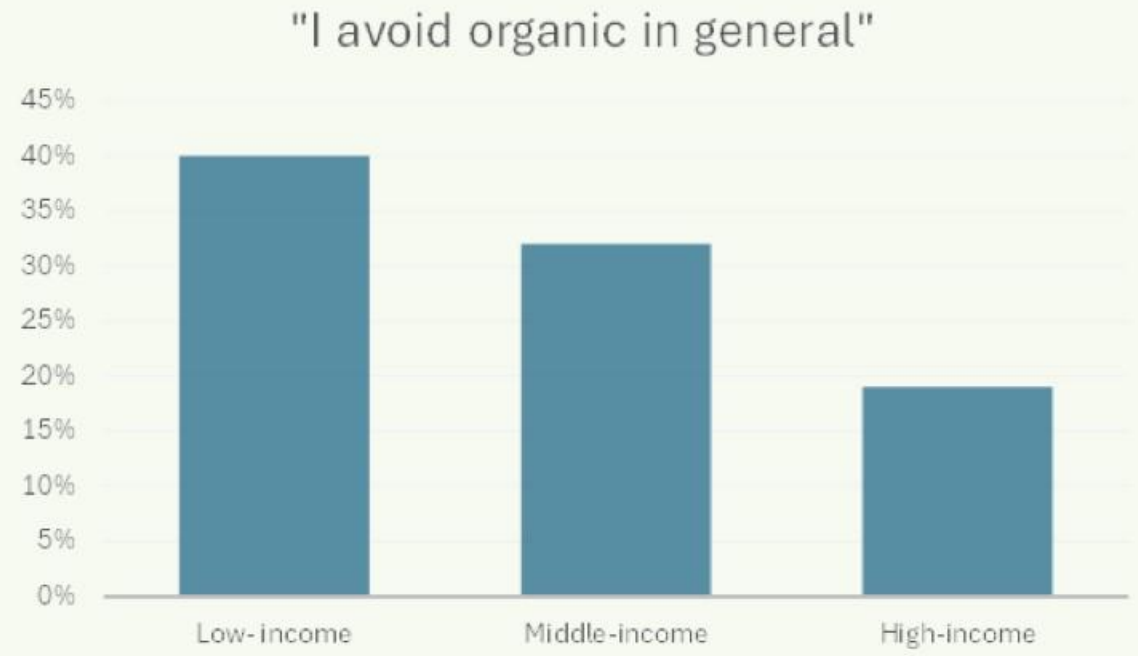


But...

Building on previous research:

Organic actives:

Organic "enthusiasts" – Always buy organic across at least 4 product categories

Organic "regulars" – Not a high volume bought but at least "always buy as organic" in at least two categories

Organic considers:

Organic "occasionals" – Tendency to buy organic on occasion (e.g., as a treat)

Organic "deal seekers" – Greatest tendency to buy organic when on offer or similarly priced as non-organic

Organic "reducers" – Engaged with the organic market but less so in the last two years

Organic “enthusiasts”

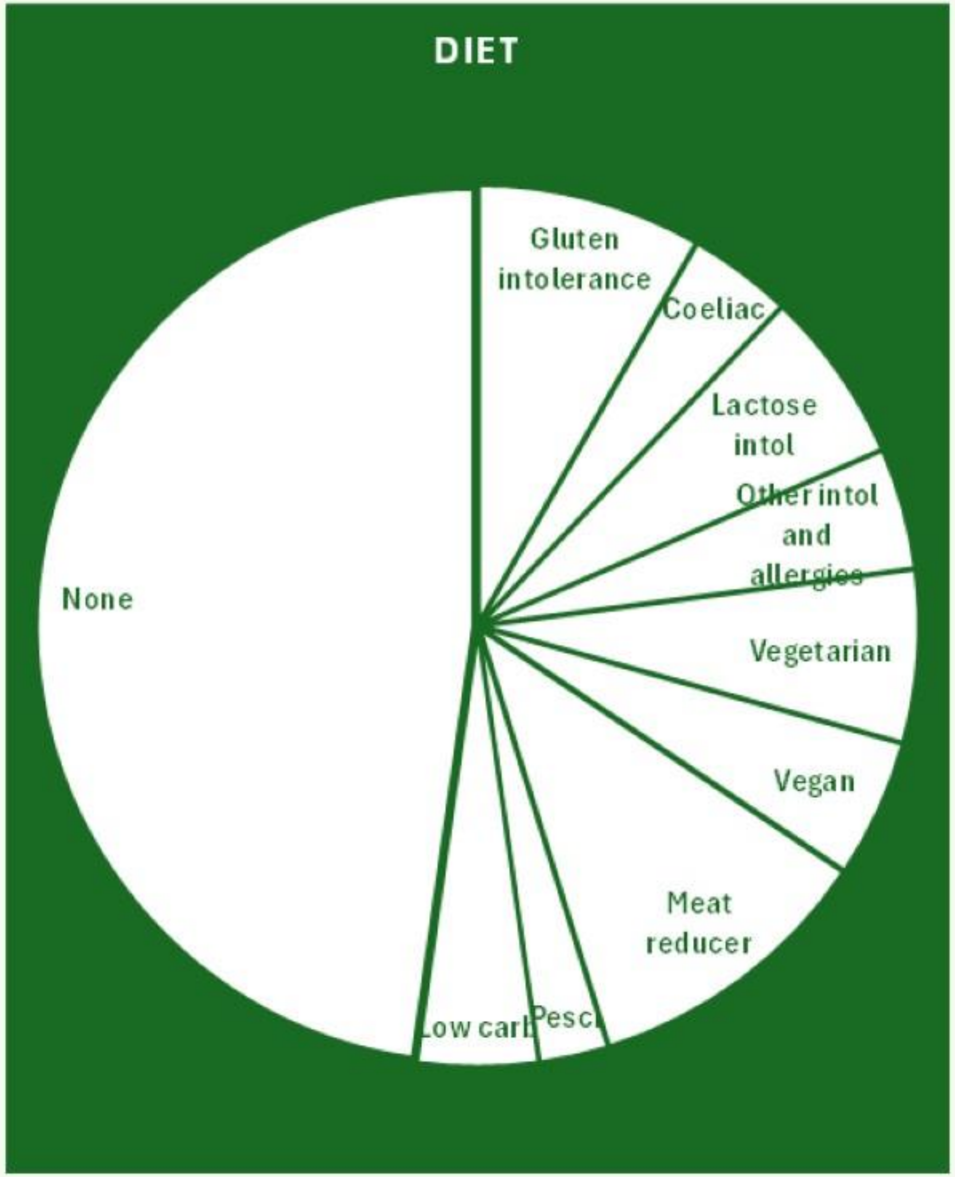
Characteristics

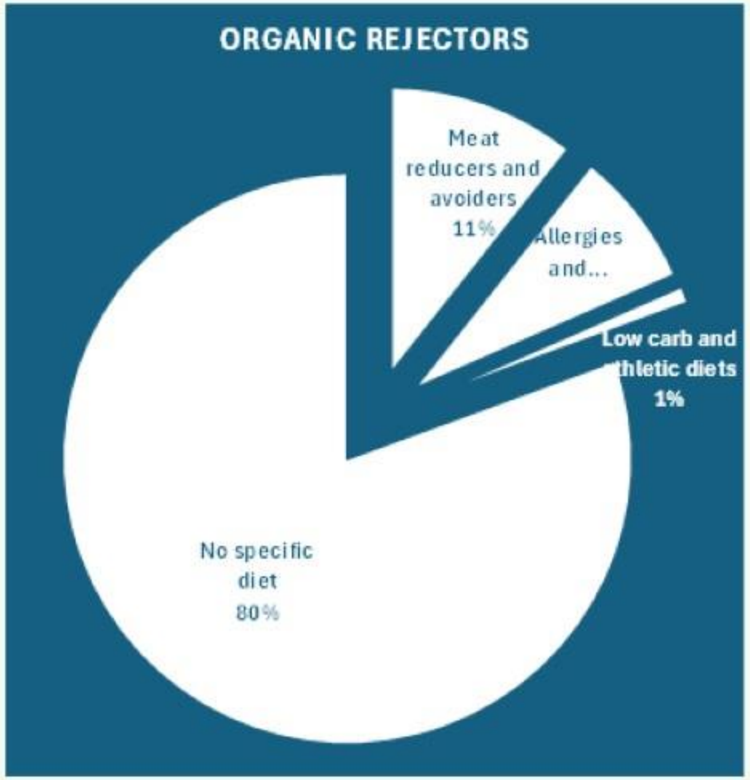
- More female than male
- Younger overall
- Predominantly lower-middle- and lower-income households
- 32% employed, 26% not in employment, and 22% part time/freelance
- More than half renting/in social housing
- 51% had children – majority of family types were new families (baby/infant) and young families (primary school)

Motivations/preferences

- Positive health benefits
- Nutrition
- High trust in certification

Organic “enthusiasts”

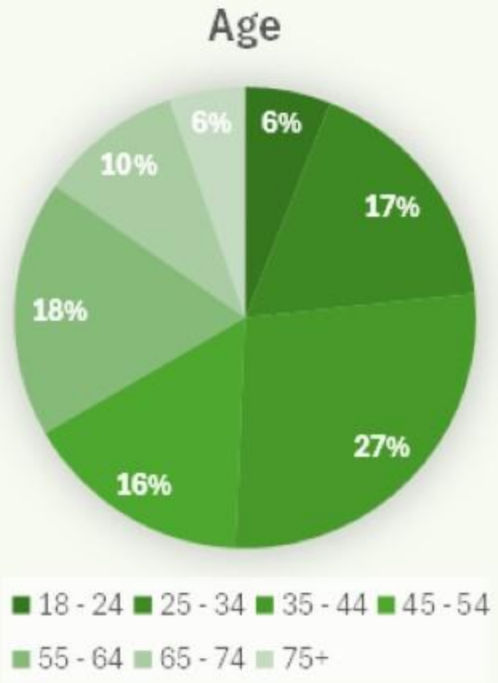


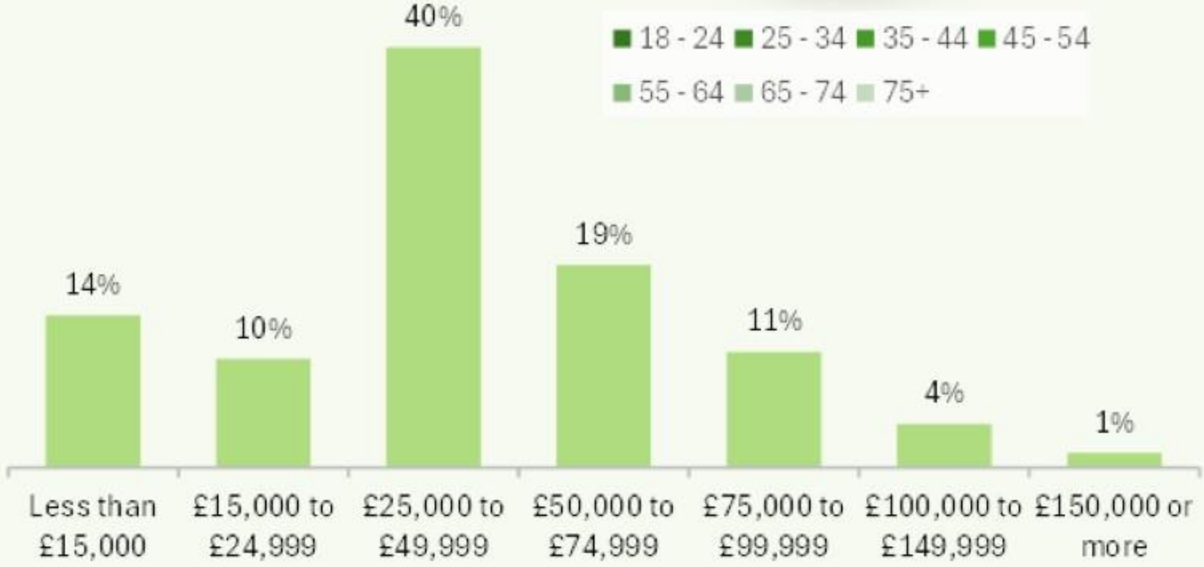


Organic "regulars"

Characteristics

- Older than the enthusiasts on average
- Greatest tendency to buy just 2-3 organic items all the time but not much engagement beyond those categories
- Health a priority – but also prefer to read product labels, watch the budget whilst shopping, and look for quality and durability in products

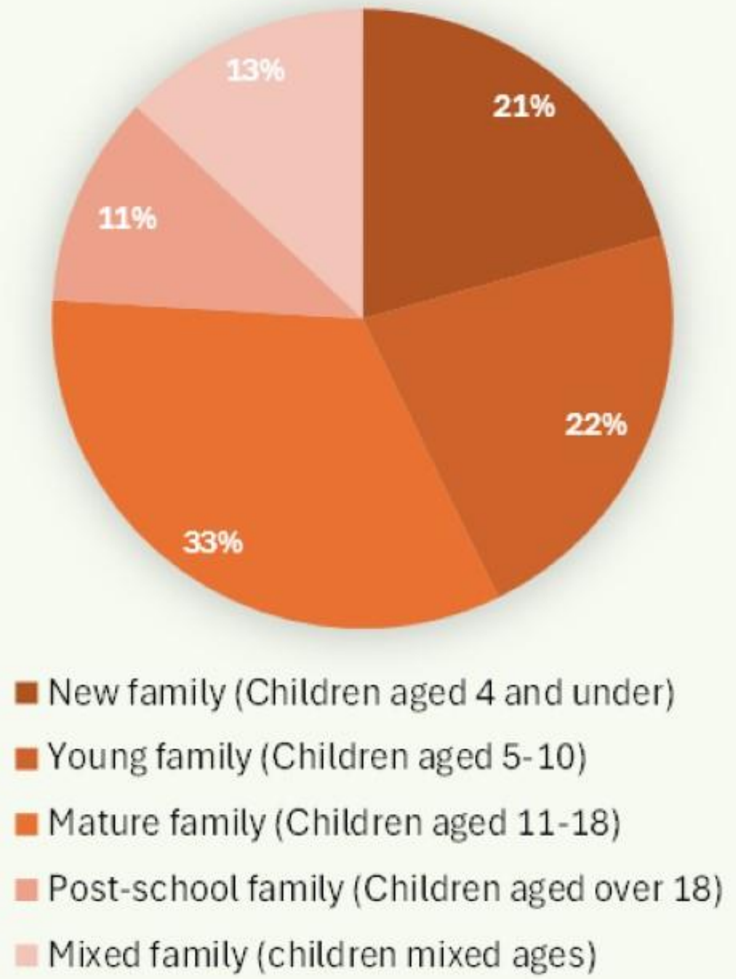




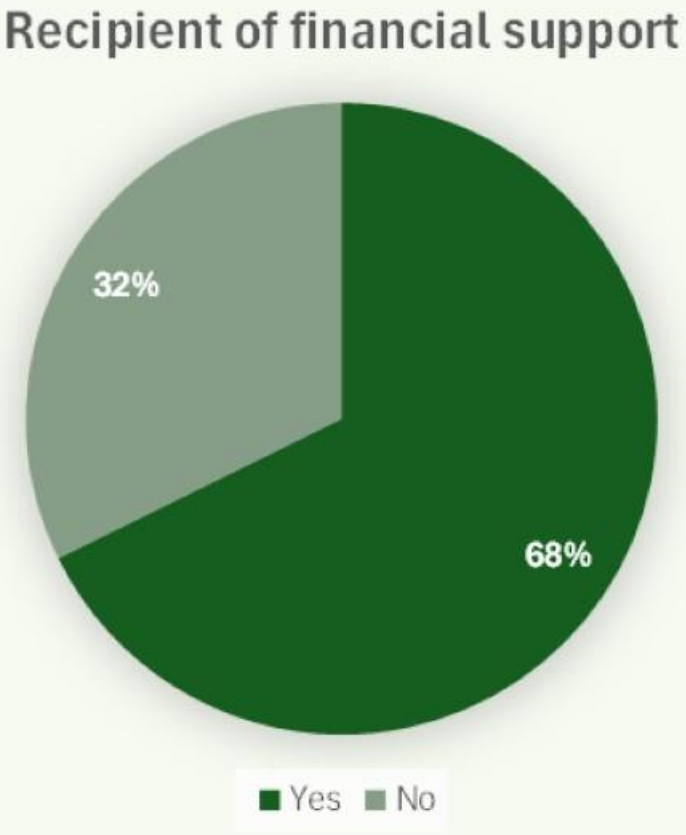
Organic "occasionals"

Characteristics

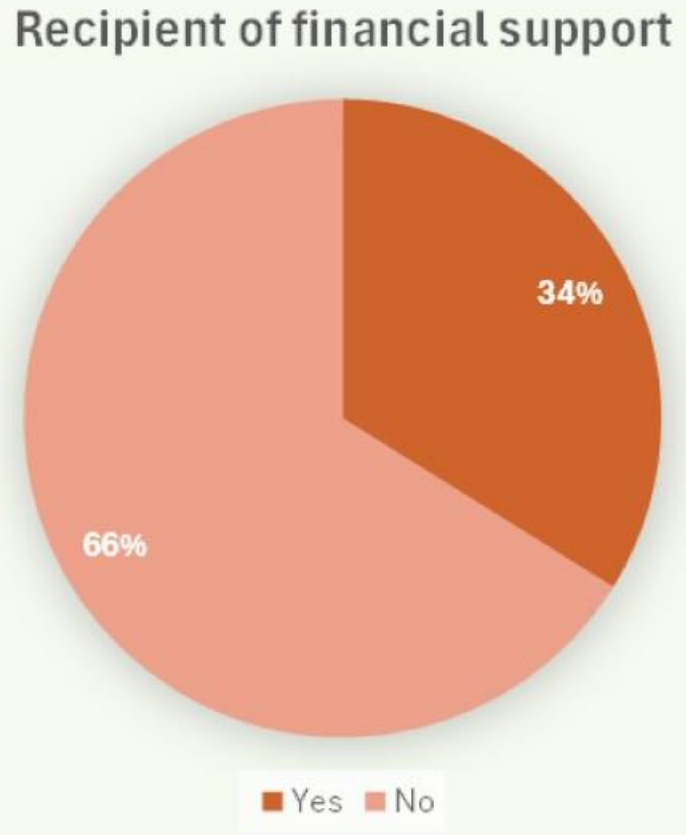
- 62% in employment or self-employed (more closely aligned with population figures)
- More mature families (secondary school) and "post-school" (children living at home) families
- Greater proportion are private homeowners
- Fit more in that lower-income to middle income category



Enthusiasts:



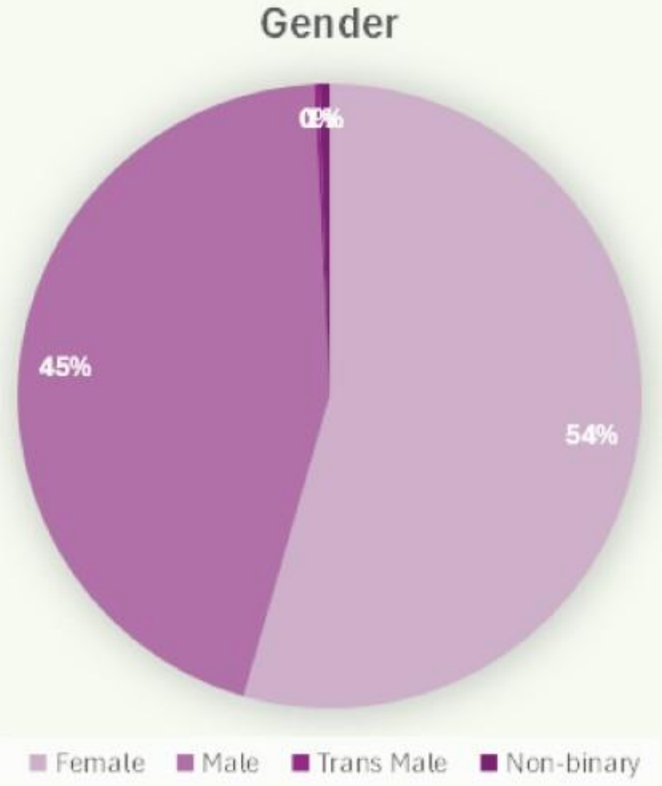
Occasionals:



Organic "deal seekers"

Characteristics

- More likely to shop in higher end chains (M&S and Waitrose)
- Cook the most from scratch (of all subgroups analysed)
- Upper-middle income
- Less likely to have children in the house
- Least likely than other organic buyers to receive financial support
- Highest proportion of homeowners
- More female than male



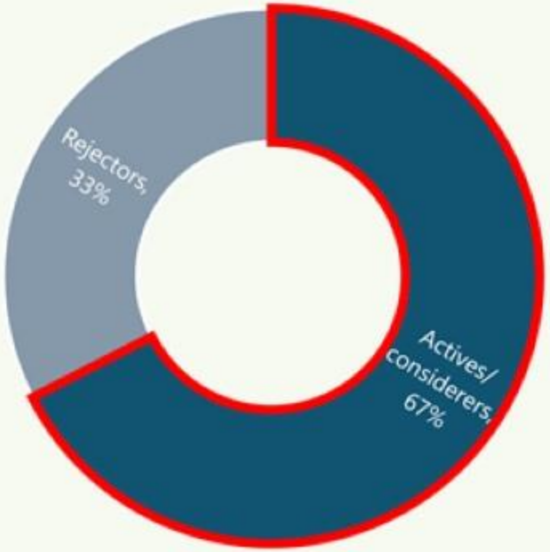
Organic "reducers"

Characteristics

- Greater proportion homeowners
- More mature and mixed age families
- Least diversity in terms of diets

Motivations/preferences

- *"I actively look after the budget and tend to buy products on offer"*
- *"The rising cost of living in the UK has made it harder for me to buy organic products"*
- *"Organic products are too expensive for me"*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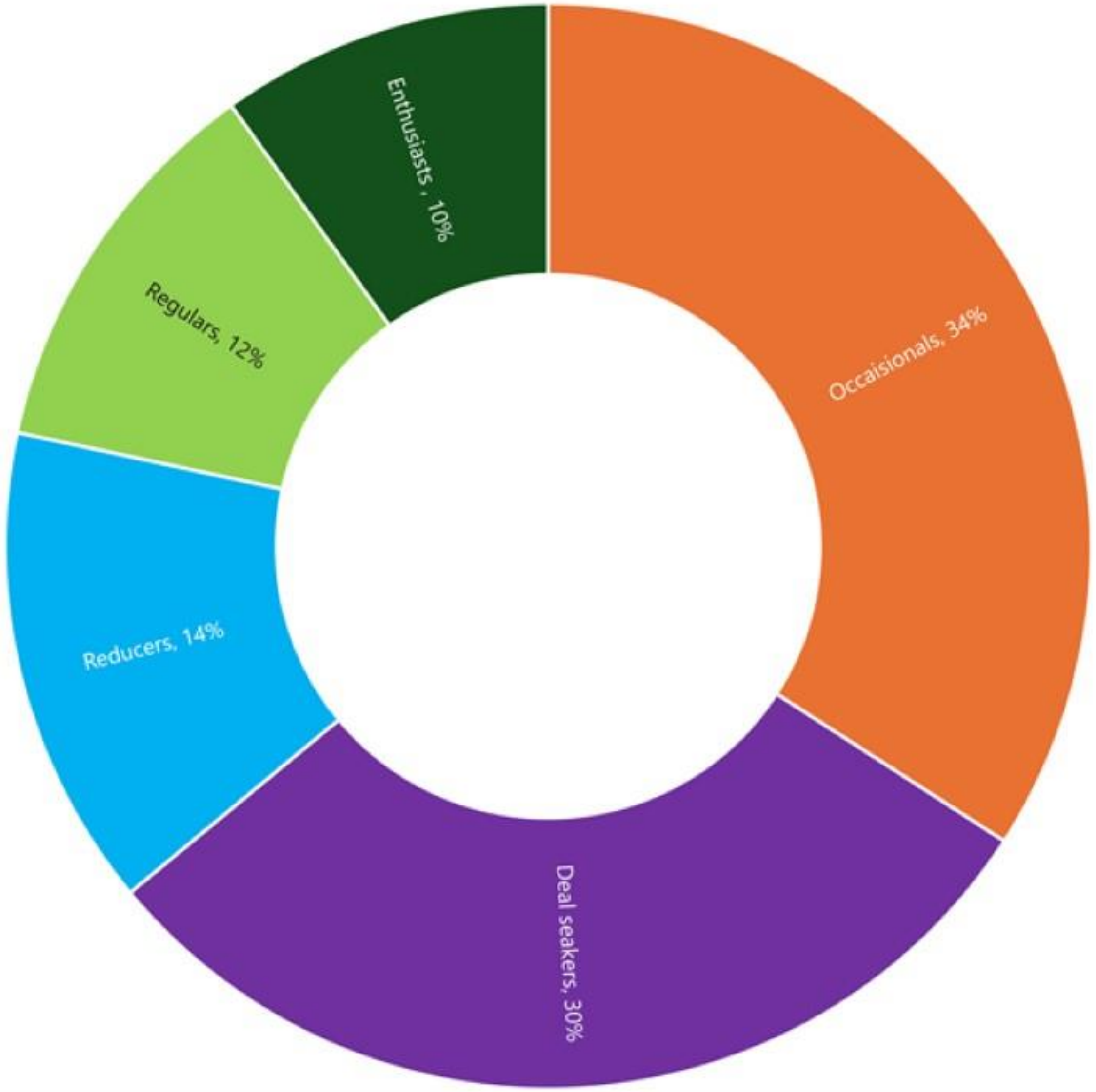
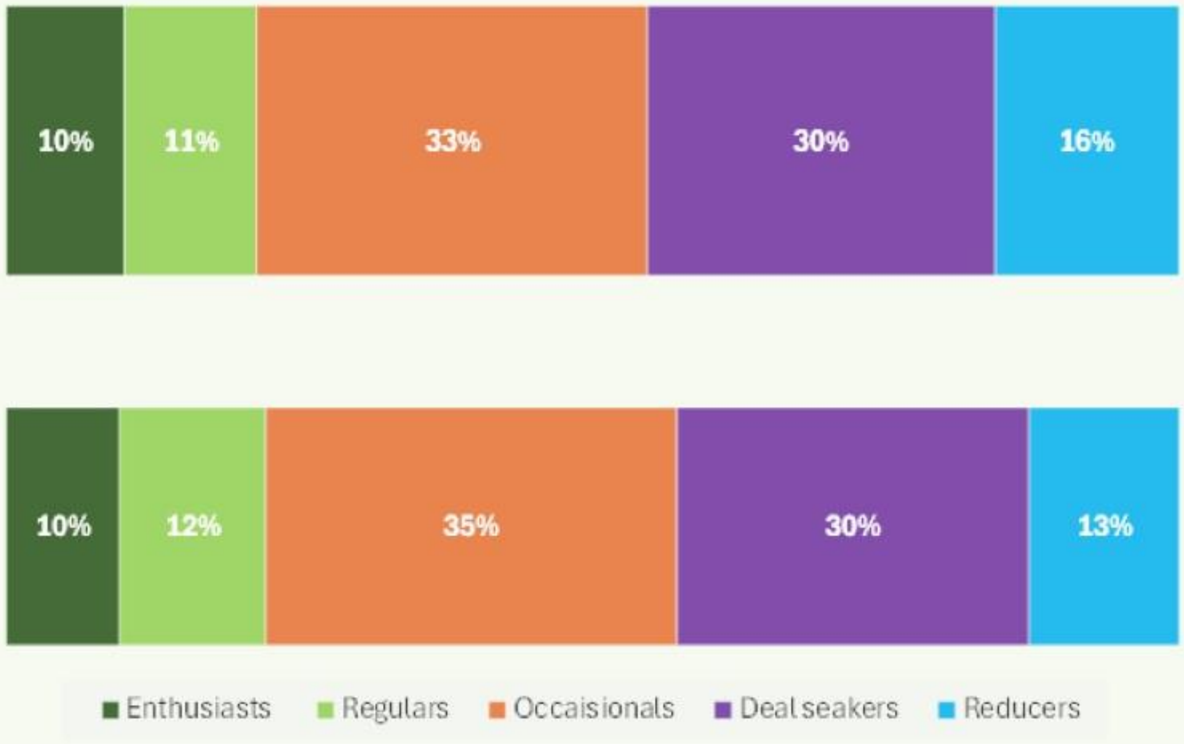
Actives/ considerers, 67%


Enthusiasts , 10%
Occaisionals, 34%
Regulars, 12%
Reducers, 14%
Deal seakers, 30%

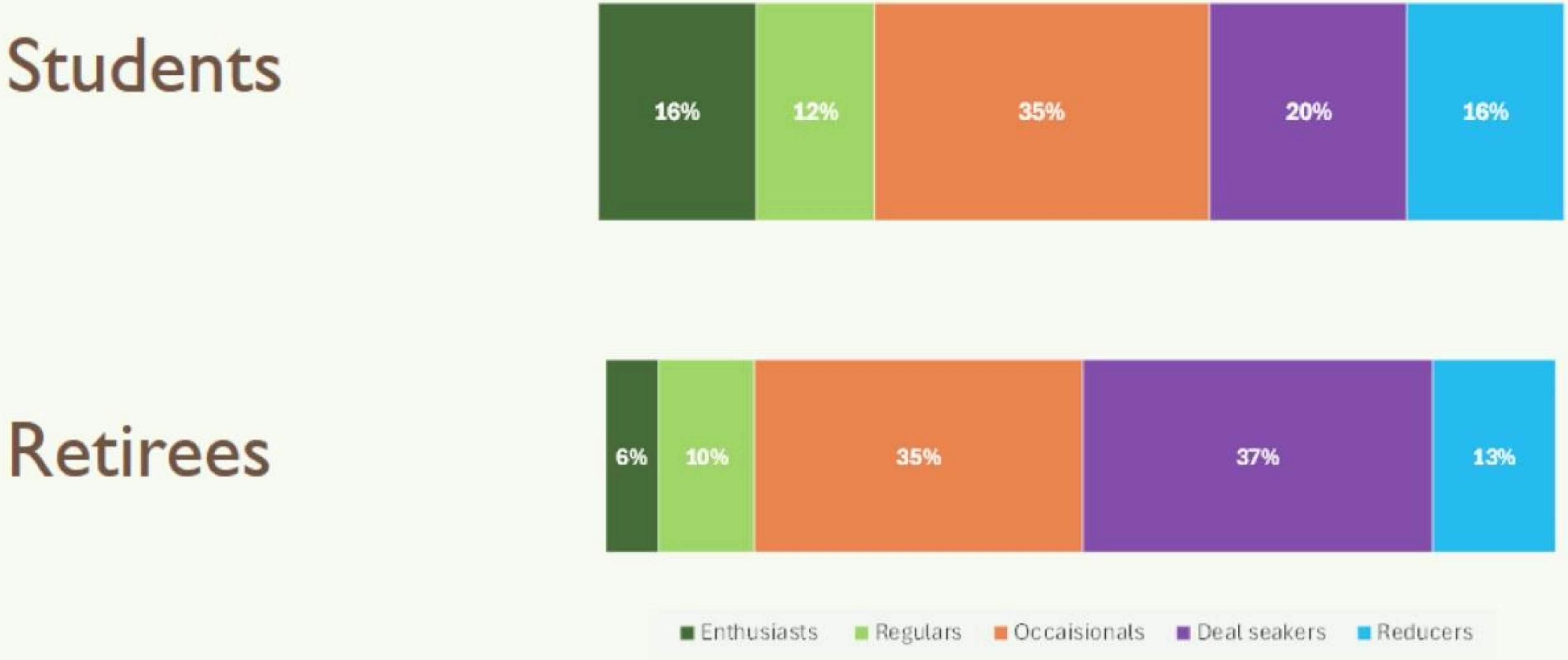
By gender…

Female organic shoppers

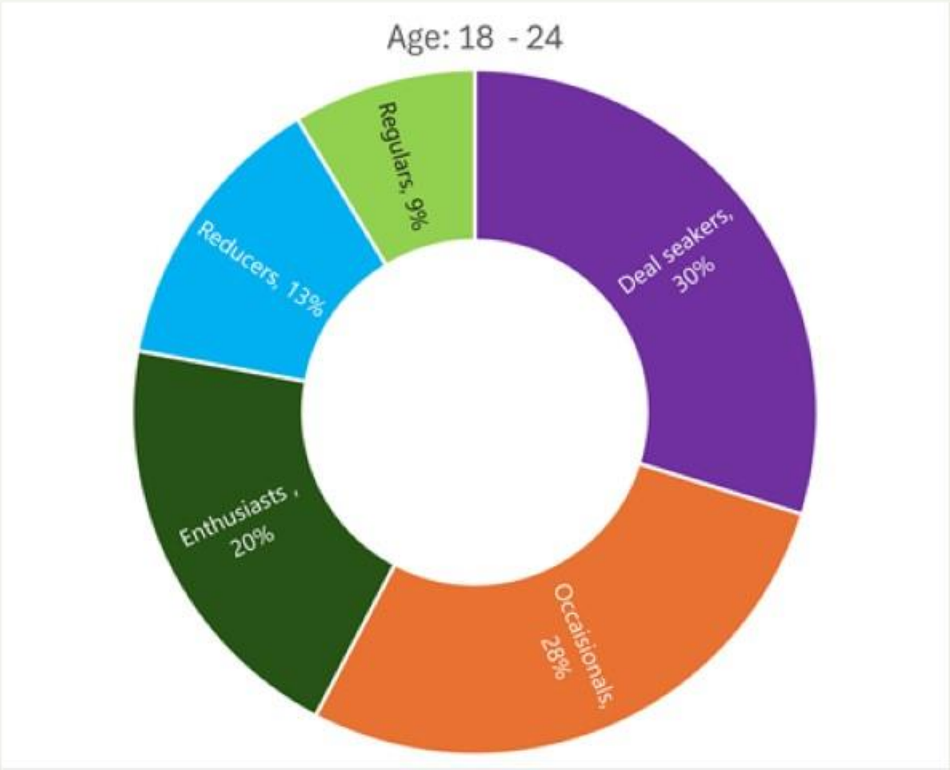
Male organic shoppers

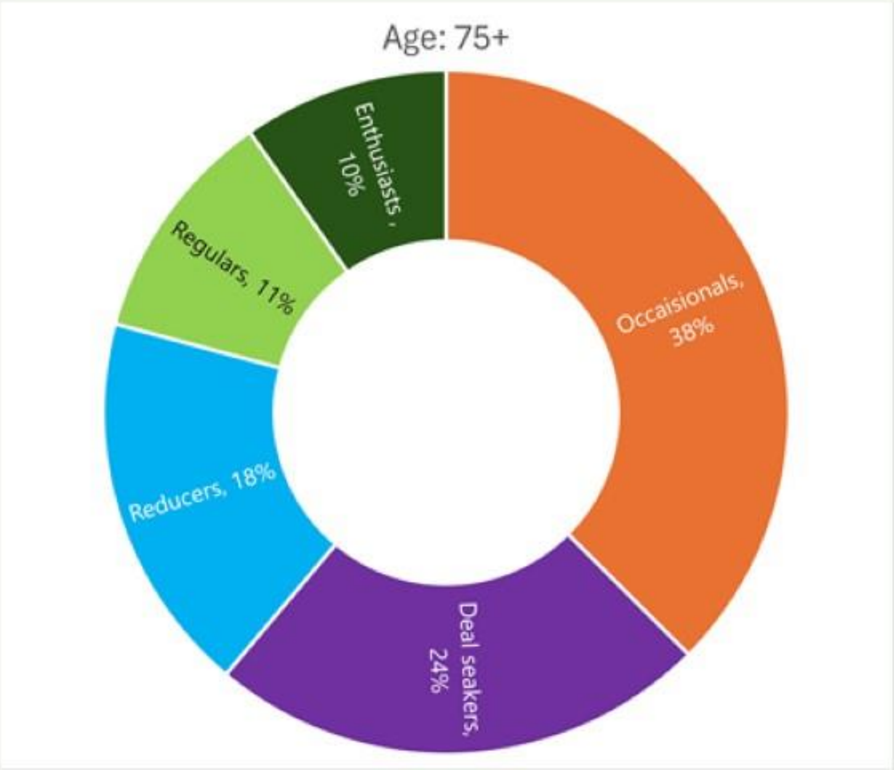


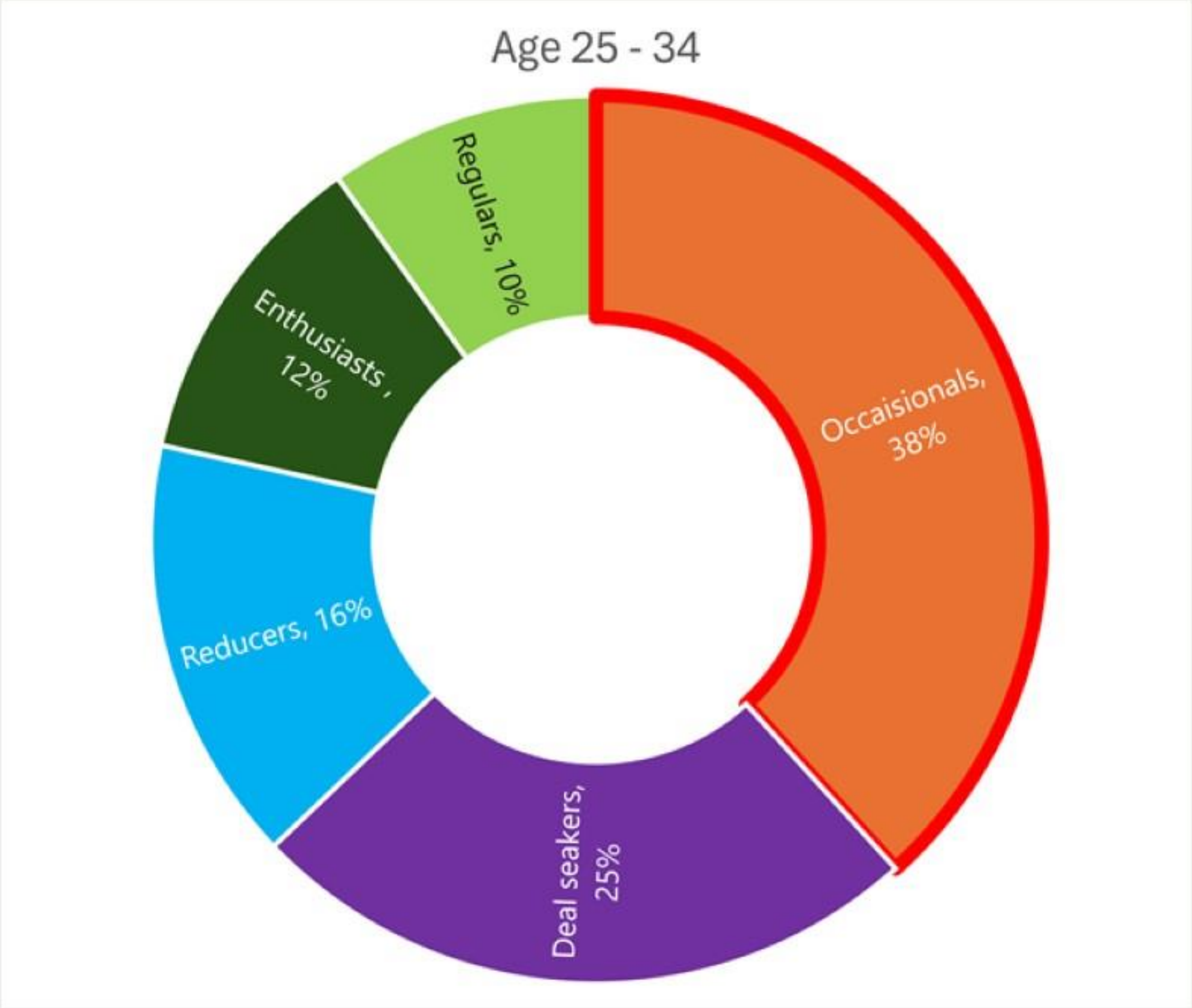
By occupation…



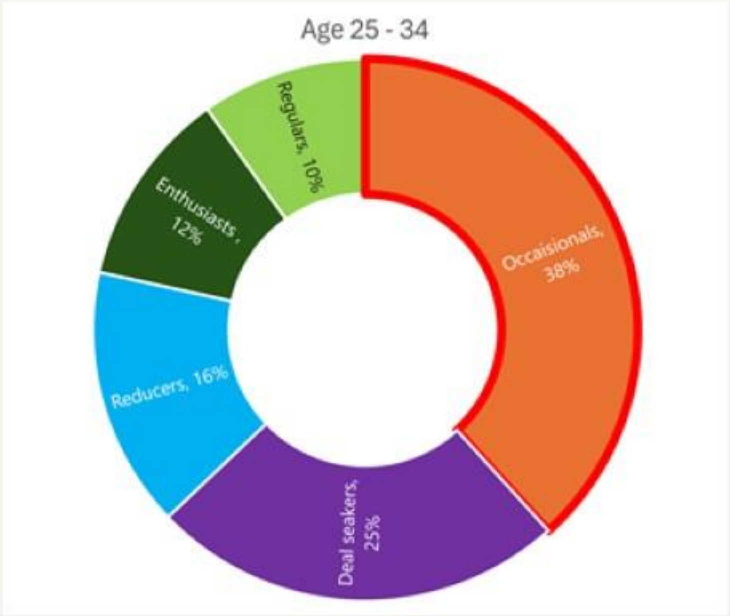
Across age brackets…






Age 25 - 34
Regulars, 10%
Enthusiasts, 12%
Reducers, 16%
Deal seakers, 25%
Occaisionals, 38%

25 – 34-year-olds - *"I buy this product as organic from time to time (e.g., for a special occasion)"*

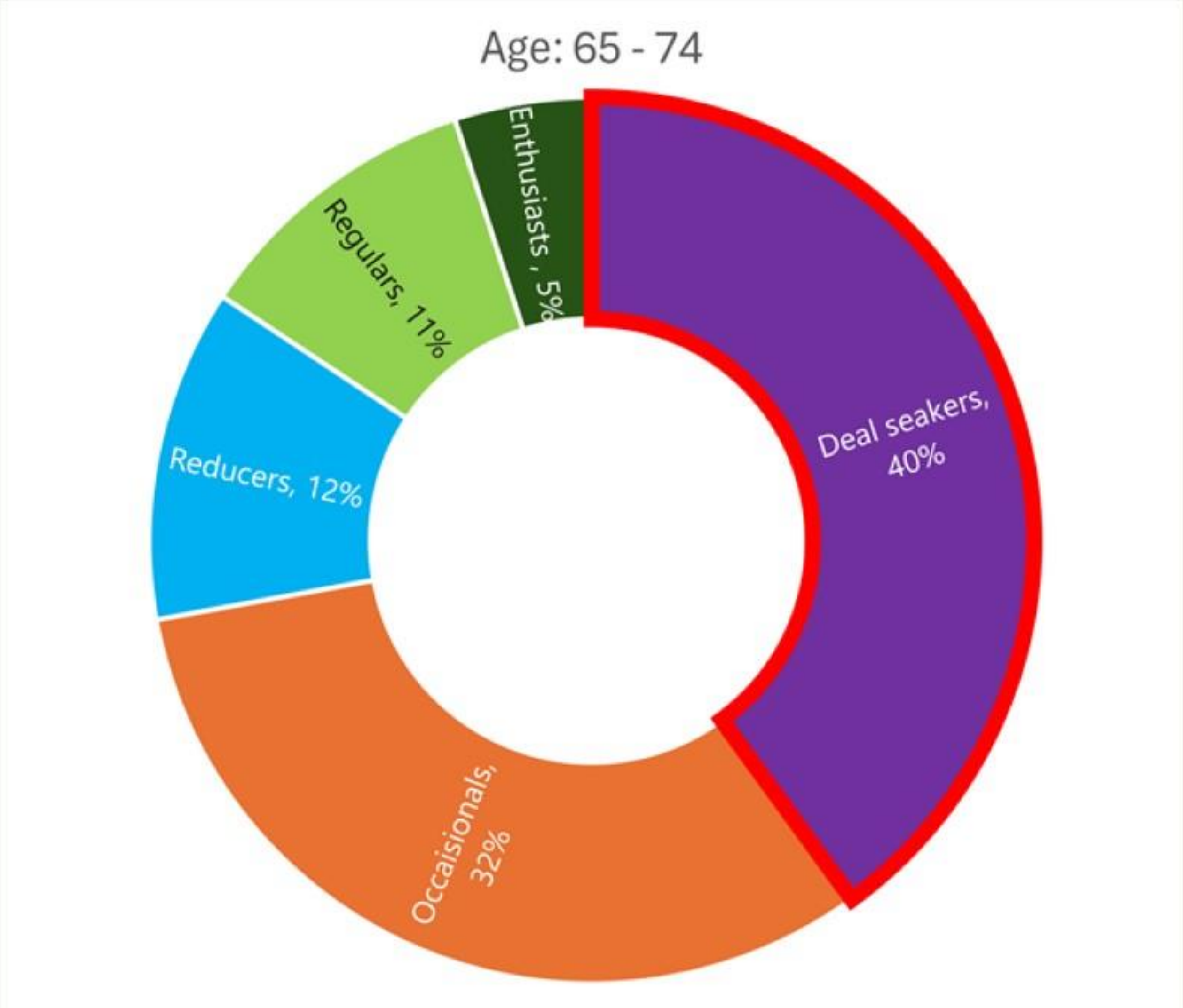


Preferred platforms: Instagram, Facebook, Online articles, TV/Streaming, Tik Tok, Billboards, Twitter, Pinterest

Motivations:

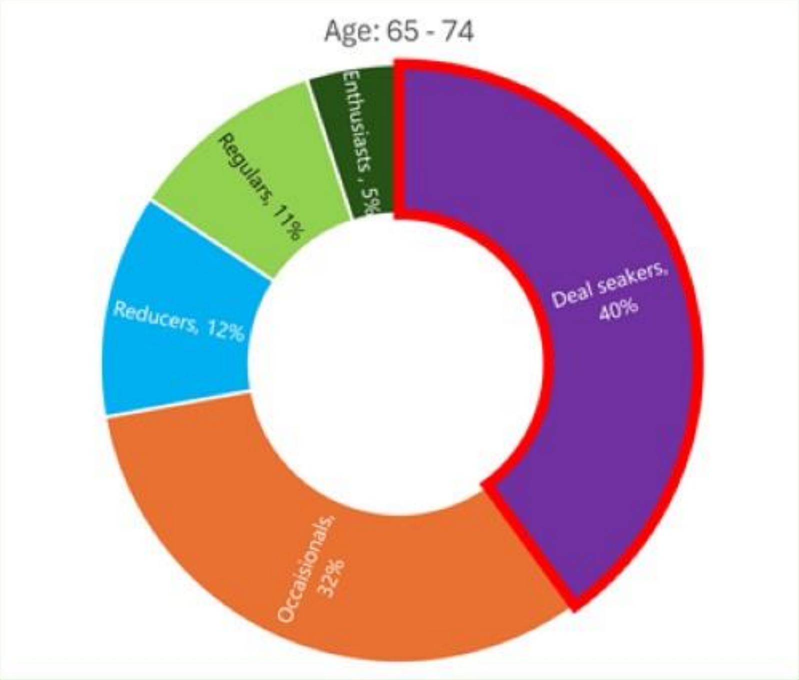
- "Organic foods have more nutrients and are healthier for me and my family"
- "Organic products are better quality"
- "Organic production excludes the use of synthetic pesticides and other harmful chemicals"
- "Organic products taste better"
- "Organic means a better deal for farmers"

Preferred shopping locations: Supermarkets, Local/independent , Street Market, Farm Shop, Farmers Market, Direct brand shop, Refill store, E-Com



Age: 65 - 74
Enthusiasts , 5%
Deal seakers, 40%
Occaisionals, 32%
Reducers, 12%
Regulars, 11%

65 – 74-year-olds *"I buy this product organic if it's on sale or priced similarly to non-organic"*



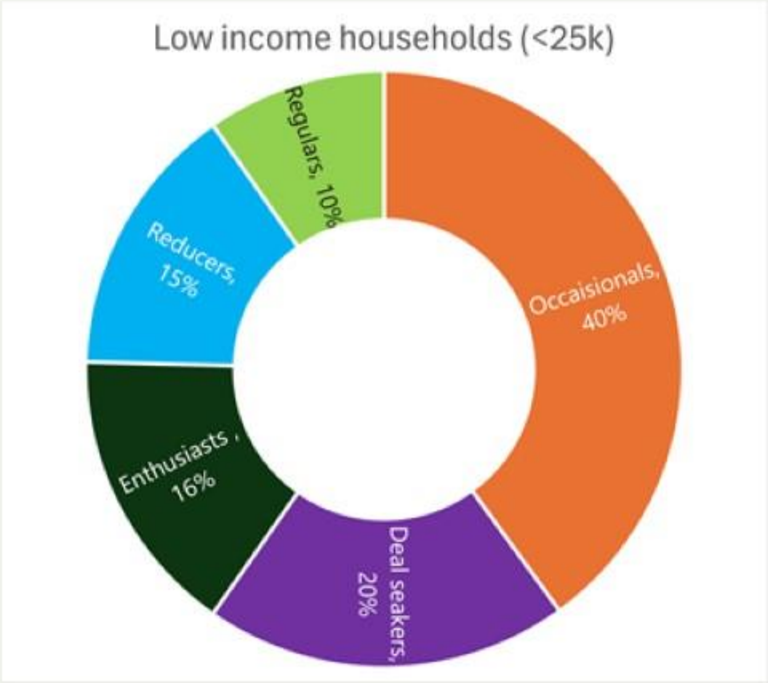
Preferred platforms: Online articles, TV/Streaming, Newspapers, Hardcopy magazines, Radio, Facebook, Podcasts

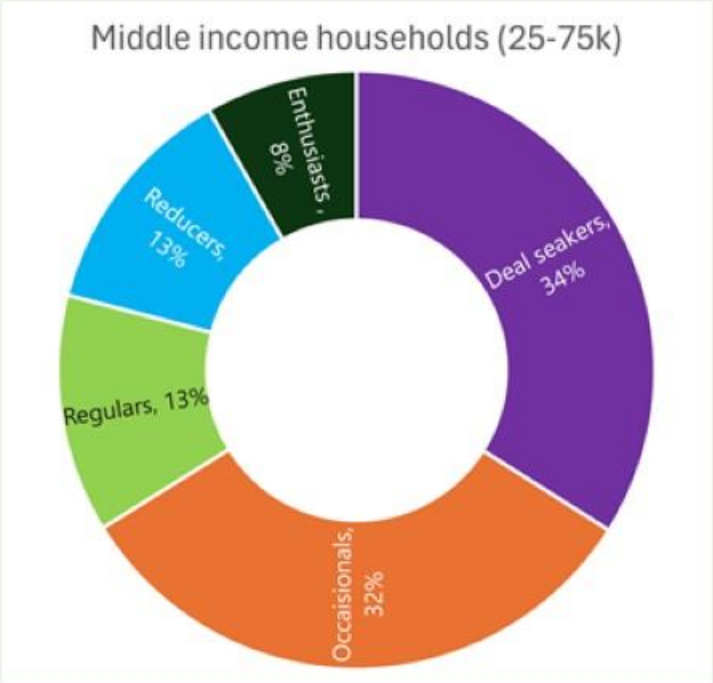
Motivations:

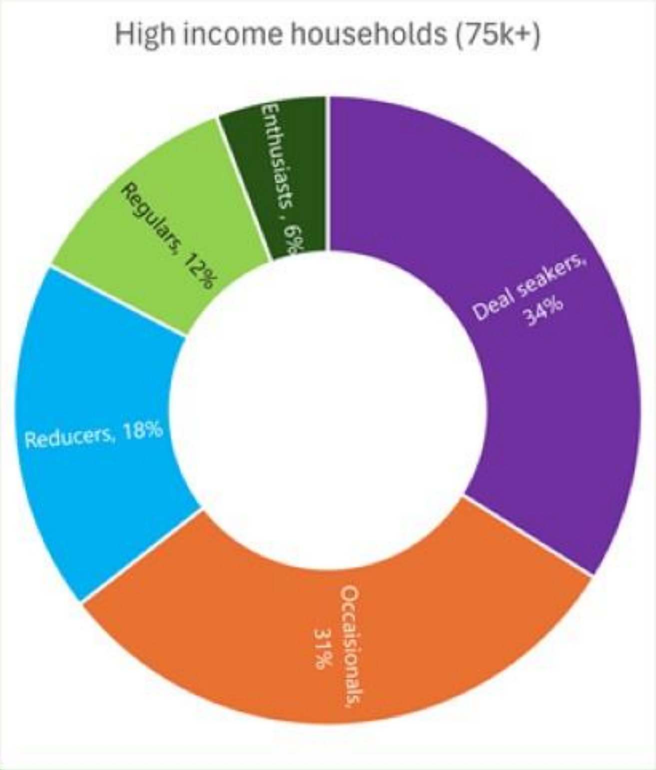
- "Organic production excludes the use of synthetic pesticides and other harmful chemicals"
- "Organic means higher production standards (e.g., around animal welfare) are used"
- "Organic farms have healthier soils which store more carbon"
- "Organic products are less polluting to the environment"

Preferred shopping locations: Supermarkets, Local/independent , Street Market, Farm Shop, Farmers Market, Refill store, Direct brand shop, Direct brand website

By income...


Low income households (<25k)
Occaisionals, 40%
Deal seakers, 20%
Enthusiasts , 16%
Reducers, 15%
Regulars, 10%


Middle income households (25-75k)
Deal seakers, 34%
Occaisionals, 32%
Regulars, 13%
Reducers, 13%
Enthusiasts , 8%


High income households (75k+)
Deal seakers, 34%
Occaisionals, 31%
Reducers, 18%
Regulars, 12%
Enthusiasts , 6%

High income Occasionals and low income Occasionals

Barriers for high-income occasional organic shoppers:

- The rising cost of living in the UK has made it harder for me to buy organic products (55%)
- I prefer to buy non-organic local food over imported organic food (43%)
- Organic products are too expensive for me (41%)
- I can't find all the products that I need in my regular shop if I buy organic (39%)
- There are too many labels on products and I don't know which is the best to choose (32%)
- I have to change my daily routines too much if I only used organic products (30%)

Barriers for low-income occasional organic shoppers:

- Organic products are too expensive for me (71%)
- The rising cost of living in the UK has made it harder for me to buy organic products (63%)
- I can't find all the products that I need in my regular shop if I buy organic (46%)
- The range of organic products is too small (41%)
- I have to change my daily routines too much if I only used organic products (37%)
- It is not clear what the benefit of buying organic is over non-organic (37%)

In summary…

- Within the organic market itself, income is not the sole driving factor
    - The *most* active organic shoppers are on middle- and low-income levels
    - Emerging trends around health and quality are driving high engagement with the organic brand
    - Diet is also a significant factor
- The dataset is rich, and can be looked at from a variety of angles
    - Possible to cover a range of research questions and objectives
    - Open to further collaboration and new lines of enquiry

- The groundwork has been laid for more in-depth qualitative research

CONSUMER RESEARCH

Full report available in a few weeks!

In collaboration with

With the contribution of

THANK YOU

hello@organictradeboard.co.uk