ORGANIC – What consumers think

ICOAS
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Content

• Why do we think about, what consumers think about organic? → ORGANIC 3.0
• How consumers see organic
• Motives an limitations for organic consumption
• Organic certificates & brands
• Conclusion
Growth or stagnation?

The growth of organic 2.0 can largely be attributed to marketing (entry of supermarkets and positioning as a premium product).

→ What is needed for the next step?
Organic 3.0
Background

Bio 1.0 / Organic 1.0
Eine Idee wird geboren

Bio 2.0 / Organic 2.0
Aus der Idee entsteht ein weltweiter Standard

Bio 3.0 / Organic 3.0
Garant für eine nachhaltige Landwirtschaft und Ernährung jenseits der Nische

Quelle: Niggli et al., 2015

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Campaign:
Organic 3.0 – New ways to increase organic
work package 3: Consumer- and image survey:
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Purpose and problem of the survey

State of knowledge of the consumers, their behavior, their important decisions / values, experiences and their motives
What is the mindsetting of (organic / non organic) consumers?
• Understanding of organic, orientation in the diversity of information
• Lifestyle, use / use & uetttings from / to organic
• Needs & (future) wishes with regard to organic

Motives for organic consumption
• Motives and barriers / organic users vs. “organic non users”
• Organic labels and brands / organic users vs. “organic non users”

Development of future scenarios for a further development of "Bio"
• How can growth be generated for bio?
• What are incentives, triggers, promoters (triggers)?
• What are limitations (barriers)?
organic 3.0 – consumer survey 2016-2017 study design

- **Extensive desktop research** on the state of research
- **24 qualitativ group discussions (GD)**
- à 2 h with je 8 participants
  - 16 GD in urban space (Vienna)
  - 6 GD in rural space (Lower Austria, Upper Austria, Burgenland)
- **2 GD with organic-non-user (Vienna)**
- **18 expert talks** à 45-90 min
  - political framework
  - information and education
  - New distribution channels and platforms

**Sample group discussions organic user**
- over all N=179 participants
- 1/4 heavy-user [HGU]: more than 70 % of the total shopping are organic products
- 1/2 regular-user [RGu]: 30-70 % of the total shopping are organic products
- 1/4 Casual organic buyer [Gu]: up to 30 % of the total shopping are organic products

About the definition of the shopping-types
- The division into three different types of users took place on the one hand by frequency of purchase (query in the screener to the household organic products in the refrigerator and storage cabinet), on the other hand after the indication of personal shopping in the group discussions instead. This resulted in a necessary further differentiation in regular users and occasional users.

**Sample group discussions organic-non-user**
- Overall N=17 participants
- Buy no or very rarely organic products
Conceptual field Organic
How consumers see organic

produce → shopping → consume

PRODUCTION

PRODUCT

CONSUMPTION

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Knowledge, concepts and discourses dominate the view of the core of organic farming.
The plant is more present than soil and animal welfare.
Environment and climate surprisingly do not play a major role.
Only little mention of climate change in contrast to its media presence.
Conceptual field organic | Product (food)

For the product, control appears as the most important topic (safety, trust in organic). This correlates with the great importance attributed to the topic of marketing (= imaging ≠ information).

→ ‘Organic dilemma': one's own claim is at the same time the systemic weak spot and the biggest hurdle for organic consumption and organic growth.

• Great importance is given to marketing.

• Transport appears as the third most important topic in the product area.

• Quality, distribution and processing are of secondary importance for organic consumers.

→ 'Label confusion and competing concepts': the regional / seasonal risks outweigh the opportunities for organic. The gap between knowledge and marketing seems big on this topic. A problematization in the communication would be necessary, but appears neither desired nor successful.
Conceptual filed organic | Consumption

Health, healthy food & nutritional styles as well as enjoyment and taste are arguments for Bio Top of Mind.

Values & lifestyles are clearly at the center of consumer habits.
Motives around participation are surprisingly small.
The issue of the higher price of organic products as a barrier to the growth of organic.
How far is organic?

What organic guarantees cognitive interest

• How does the perception of consumers differ from what is organic about the legal regulations?
• What is central and where are the limits of the consumer's "subjective organic-concept"?
• What does that mean for production, market and politics? What are the consequences of this?

* Nach EU-Verordnung und ÖPUL

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How far is organic?

What consumers want

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Motives for organic consumption

Cognitive interest

• What are the most important reasons for organic consumers to use organic products?
• Which concepts are behind this and where do they reach their limits?
• How important is consumption compared to environmental or social motives?
Buying motives for organic consumers

**Health**

„Organic foods are healthier, there is less water in them and there is no residue from anything.“

„Health without organic does not work.“

**Enjoyment**

„Quality is important to me, if it's not organic, it just does not taste so good.“

„The taste is important to me, organic is just genuine. The vegetables taste different.“

**Holistic & Sustainability**

„Consciously deal with resources.“

„Preserved diversity“

„Fair to people, animals & environment.“

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Buying motives for non-organic consumers

For the non-users, the benefits of organic can not outweigh those of conventional.

- The higher price represents the biggest barrier.
- The EU-wide legal regulations and controls for production are unknown. Organic is therefore generally questioned. It is believed that it is not organic in there, where organic is on it. Organic from abroad seems even more doubtful.

- Due to the general doubts about the organic quality of organic products, the additional price has no justification for non-users, which is also a social barrier for many.
Motives for Organic Consumption: The Conclusions

• The idea that **organic is healthier and tastier** is widespread, but not as a matter of fact, it contains less pollutants.

• Above all, organic helps consumers consume more **consciously**.

• The **consumption of organic products** and the **change in eating habits** (less meat, more unprocessed LM) produces important sustainable and global effects.
Limitations for the purchase of organic

„In everyday life, organic products are already a luxury item for me, where I say: well, I allow myself that now.“

„Organic is not affordable for everyone.“

„Organic chocolate is really super-expensive.“

„It was believed with organic everything is great, […], as you pay more for it.. Then you realize, that's not all that great.“
'Pictures', 'Framing' & Trends? The Conclusions

- Organic has the image (and price) of a **premium product**. Many consumers, however, want organic to become the norm.

- The **certified organic label** is an additional argument in the sale, which is therefore additionally charged by all brands with their own meanings. This creates some confusion and reduces confidence in the system.

- Industry-serviced **trends** ("regional", "vegan") lead partly to renounce the purchase of organic products.

- Social media is fueling **the health & food trend industry**, which shifts the focus from the field (soil, plant) to one's own body (health, enjoyment, social status).
Organic certificates & brands
Cognitive interest

• What do consumers know and what do consumers think about certificates, organic brands and the standards of branded companies?
• Who do you trust, who do not you trust? Are you getting along or do you want something different?
• Which are the most famous organic brands, which are the lesser known ones?
Awareness – organic labeling and brands (queried by purchasers of organic food)

Little known

Well known

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Awareness — organic labeling and brands (queried by consumers who refuse organic)

Well known

Little known

unknown

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Organic classification – organic labeling and brands (queried by purchasers of organic food)
Organic classification – organic labeling and brands (queried by consumers who refuse organic)
Organic labeling & brands

Conclusion / 1

• Over-burdened organic consumers experience the search for legal or promotional organic signs as a major complication of their shopping.

• The EU organic label/seal, which is not always and fully known, is by no means at the center of "navigation". The importance of the additional standards of individual associations and brands vis-à-vis the legal foundations of the EU regulations is greatly overestimated.

• The consequence is that conjectures and attributions circulating that call into question the uniqueness of the labeling.
Organic labeling & brands

Conclusion / 2

• **Organic non-users** are the EU organic labeling as well as the legal regulations for completely *unknown*.

• In the jungle of the various brands, seals and their respective requirements, they find *neither orientation nor information*.

• This results in a **general mistrust of organic**, but in principle they advocate the claim to *sustainable agriculture* and the same consumption options.

• Non-users request **information** about the EU organic criteria and the **application** of the EU organic label.
Organic, as simple as possible...

- **Mandatory EU organic label on product front page**
- **Reliability of legal regulations** = 2 EU organic regulations
- **Reliability of Annual inspections** of each farm and sanctions for violations
- **EU-organic** is guaranteed *beneficial* – organic plus is a bonus

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Excerpt from: