ORGANIC – What consumers think

ICOAS
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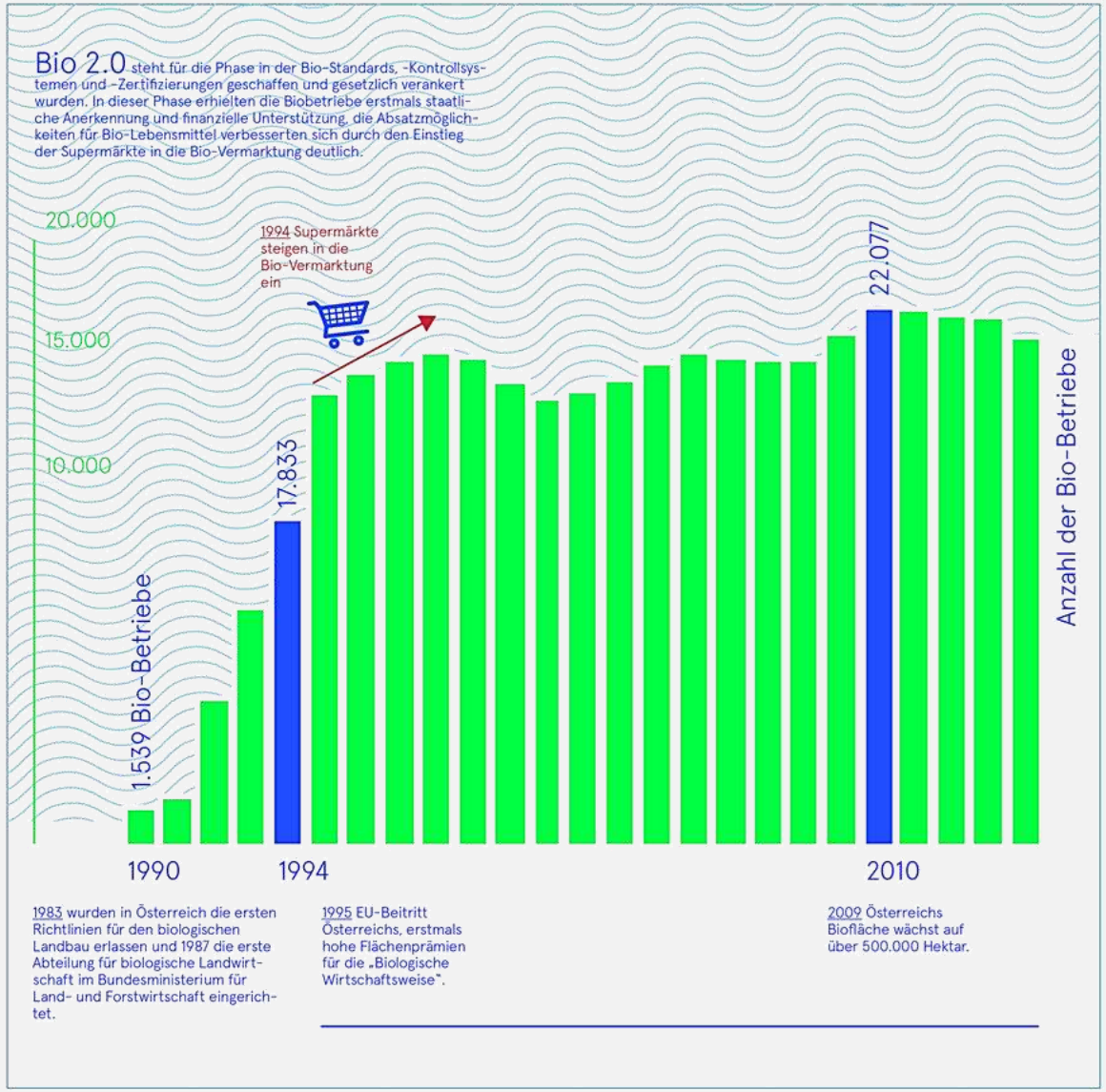
Content

- 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

Fazit: Grenzen des Bio-Wachstums / 2



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

Quelle: Niggli et al., 2015

Campaign:
Organic 3.0 – New ways to increase organic

work package 3: Consumer- and image survey:

Franke-Petsch. F., Martos, A. (2017): Bio 3.0-Konsument*innen-und -Imagestudie Phase 1 2016-2017, Freiland Verband.

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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 & uettings 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 [HU]: more than 70 % of the total shopping are organic products
- 1/2 regular-user [RU]: 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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Conceptual field organic | Production

produce

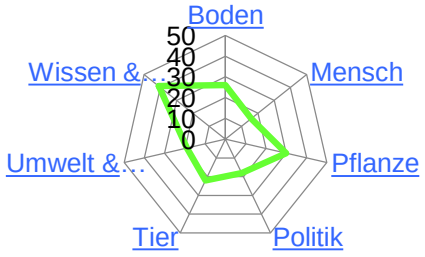
Knowledge, concepts and discourses dominate the view of the core of organic farming.

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.

Produktion



Conceptual field organic| Product (food)

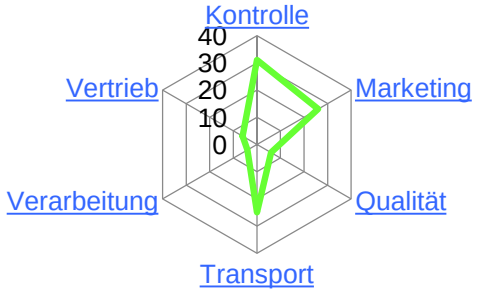
shopping

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.

Produkt



Cenceptual filed organic | Consumption

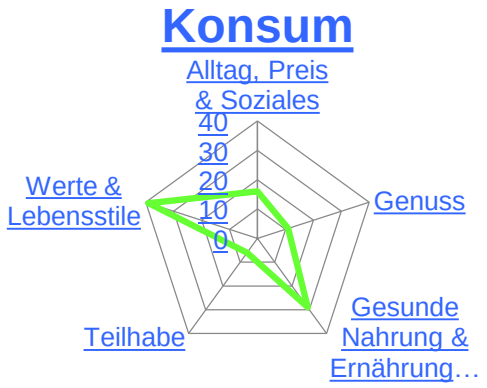
consume

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.

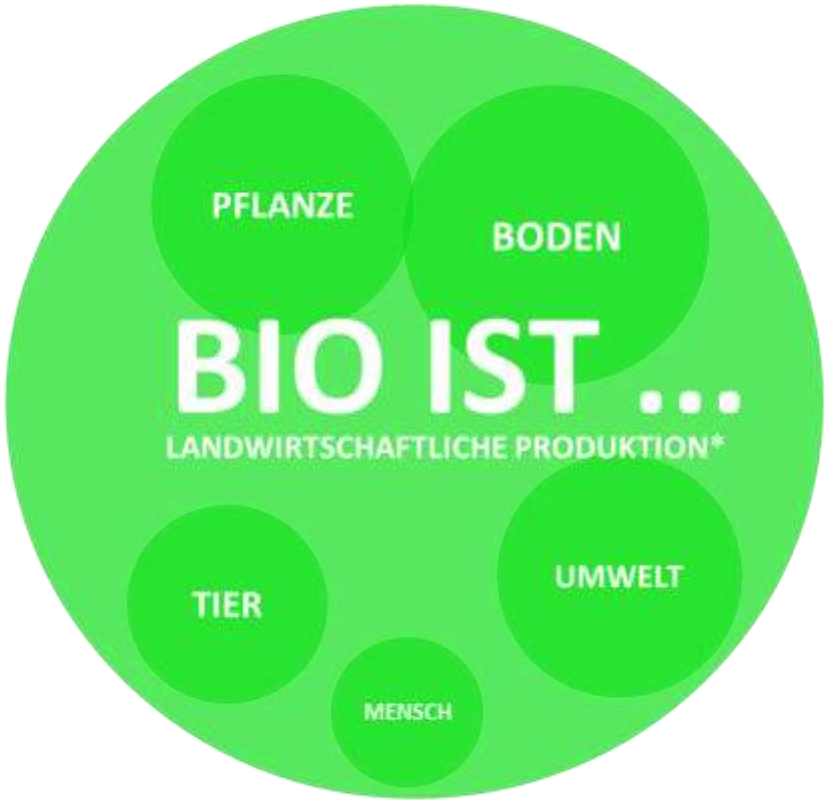


How far is organic?

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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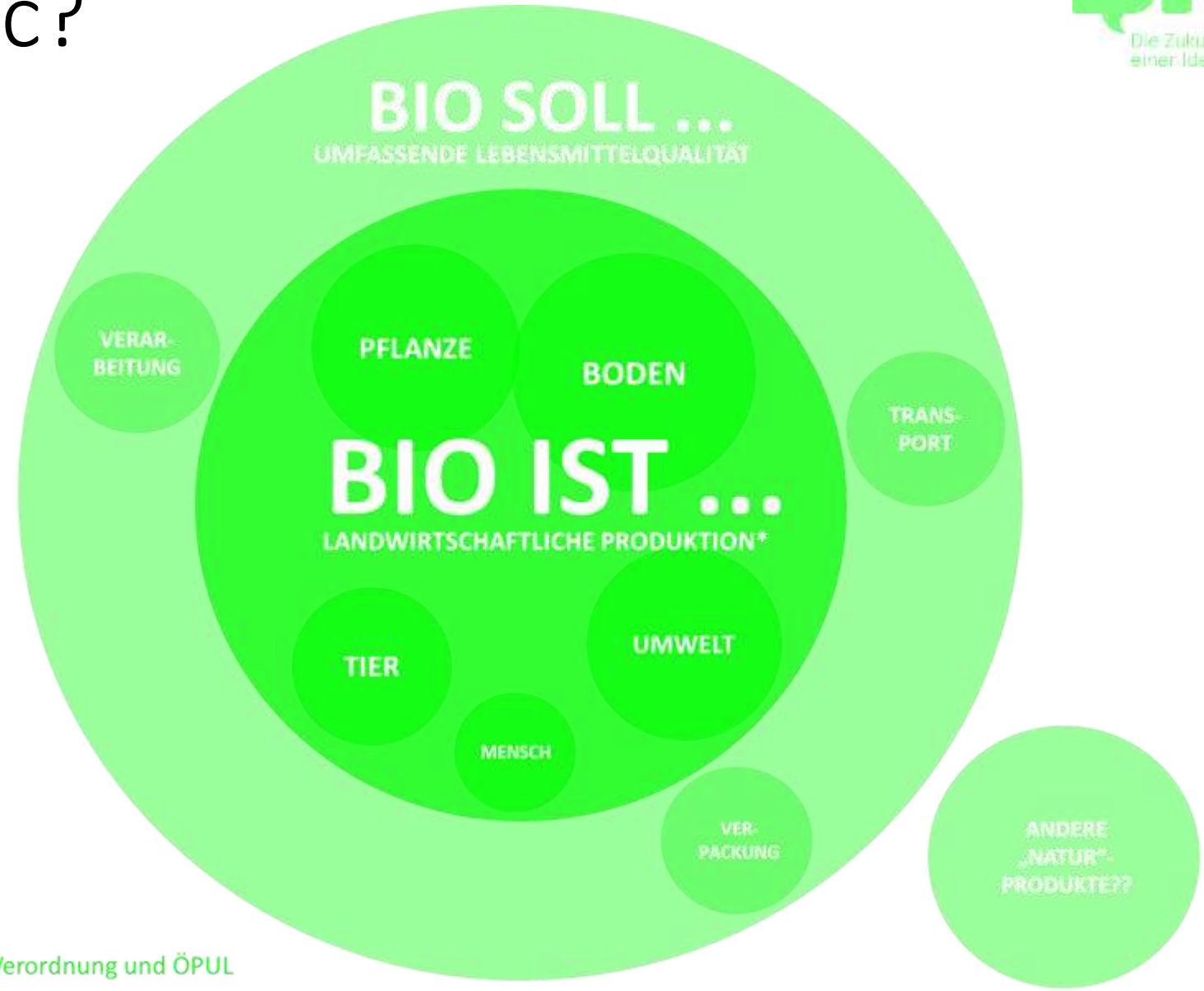
How far is organic?

What consumers want



* Nach EU-Verordnung und ÖPUL

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

*„ **Health** without organic does not work.“*

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

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

*„ **Fair** to people, animals & environment.“*

*„ Consciously deal with **resources**.“*

*„ Preserved **diversity**“*

Buying motives for non-organic consumers

conventional

- ***price!***
- *appearance*
- *(brand) trust*
- *selection*
- *region*
- *taste*
- *shelf life*

organic

- ***healthier!***
- *free of chemicals*
- *tastes better*
- *„rural“*
- *region*
- *taste*
- *shelf life*

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.

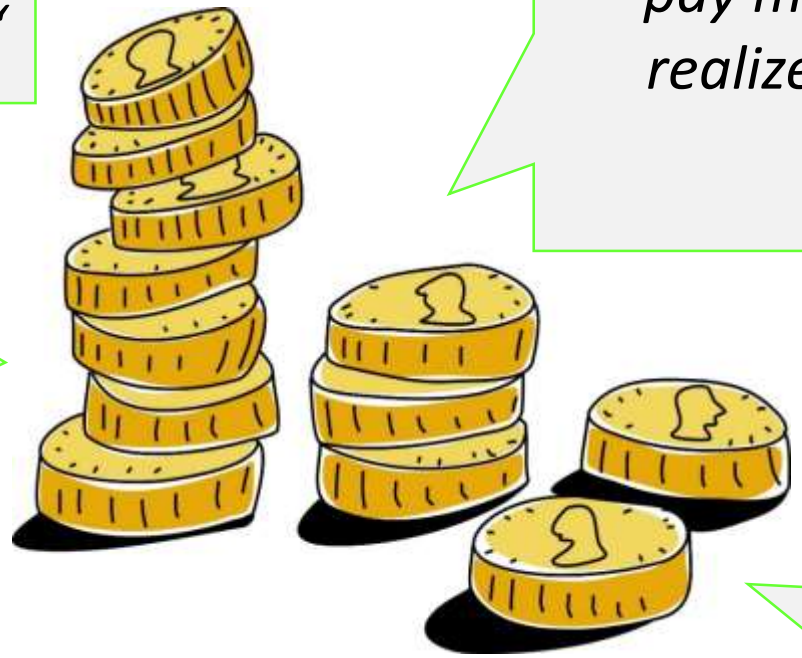
Motives for Organic Consumption: The Conclusions

- 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

*„ 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**.“*



*„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.“*

'Pictures', 'Framing' & Trends? The Conclusions

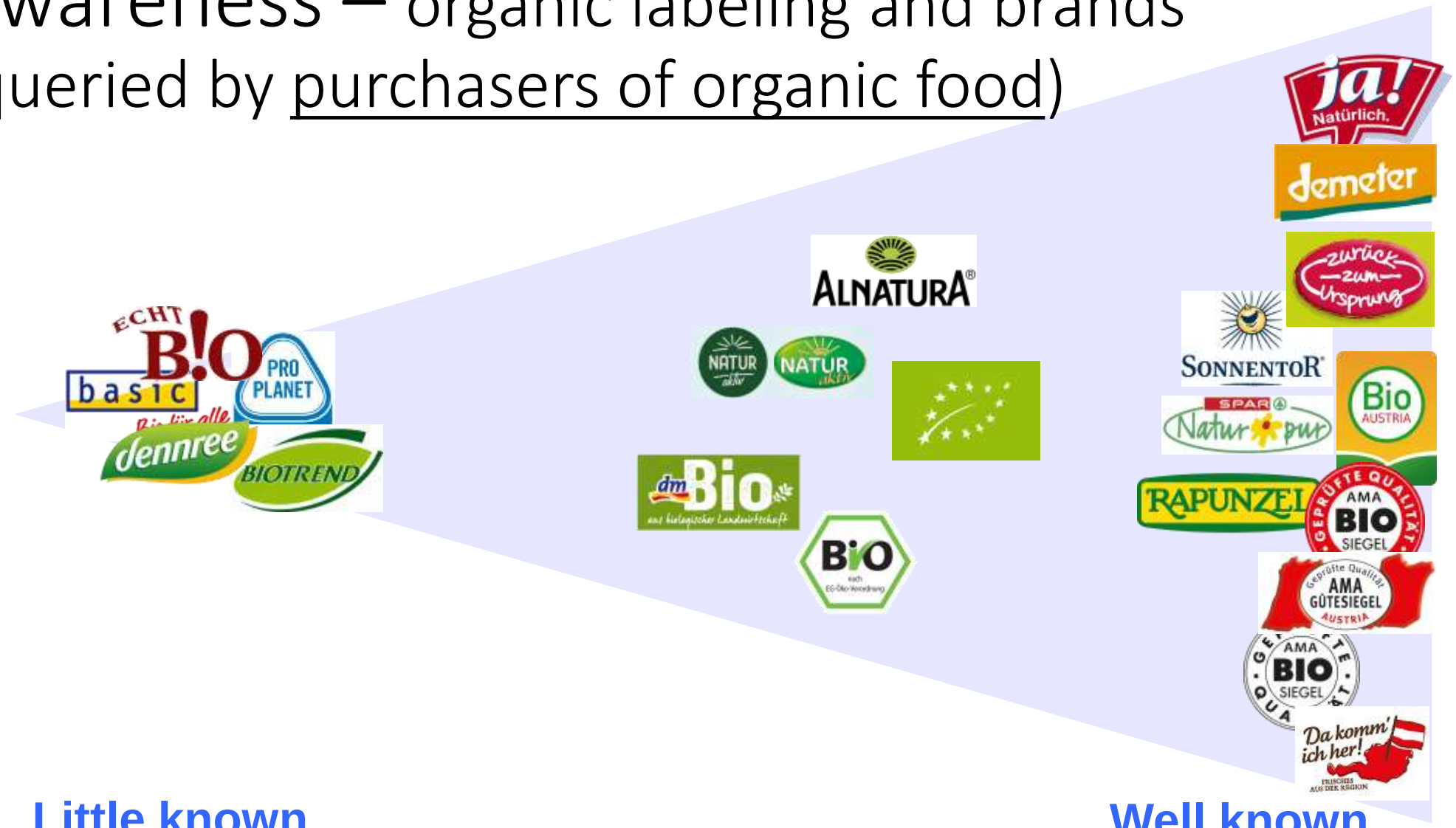
- Organic has the image (and price) of a **premium product**. Many consumers, however, want organic to become the norm.
- The **certified oganic label** is an additional argument in the sale, which is therefore additionally charged by all brands with their own meanings. This creates some confusion and 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?

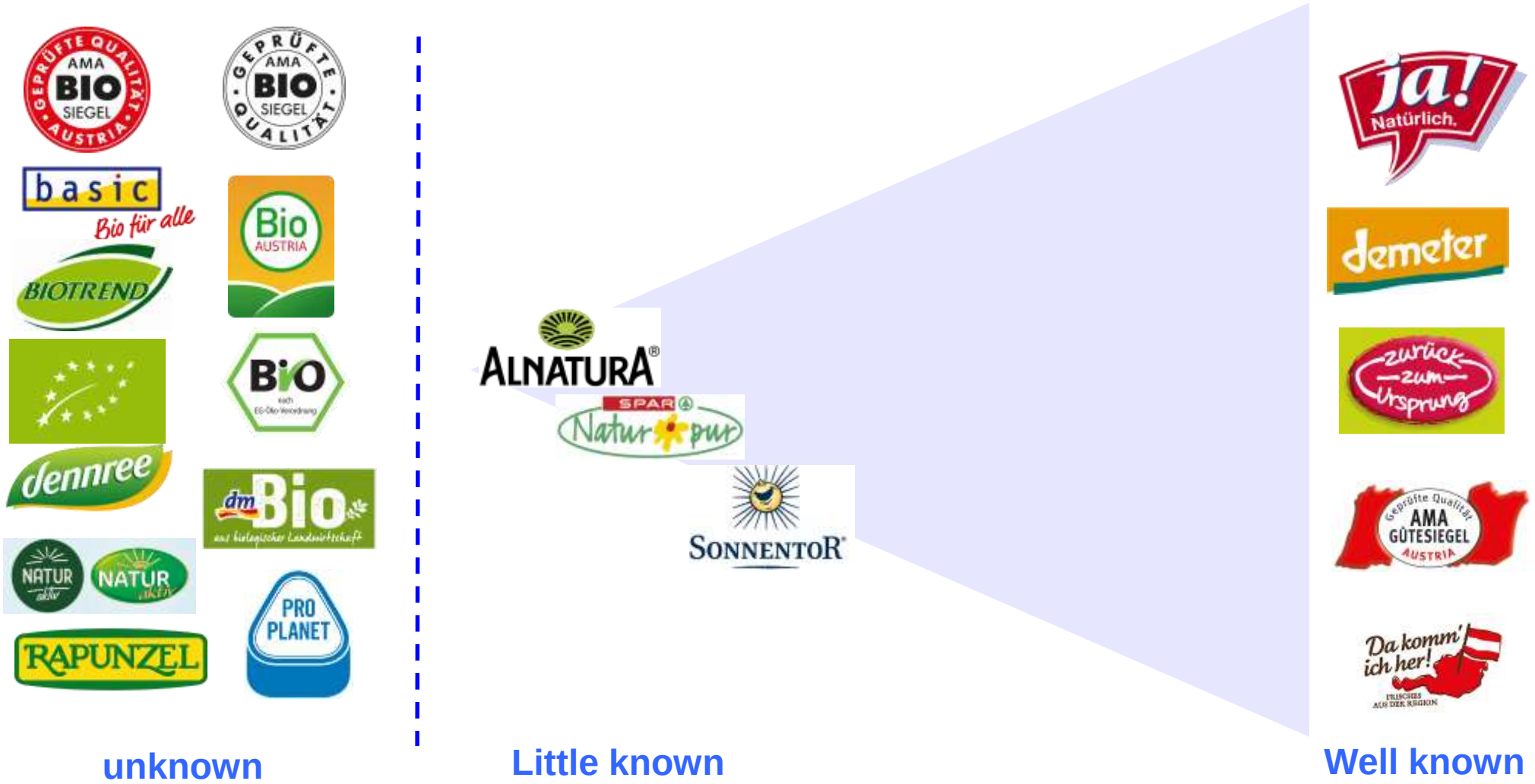
Awareness – organic labeling and brands (queried by purchasers of organic food)



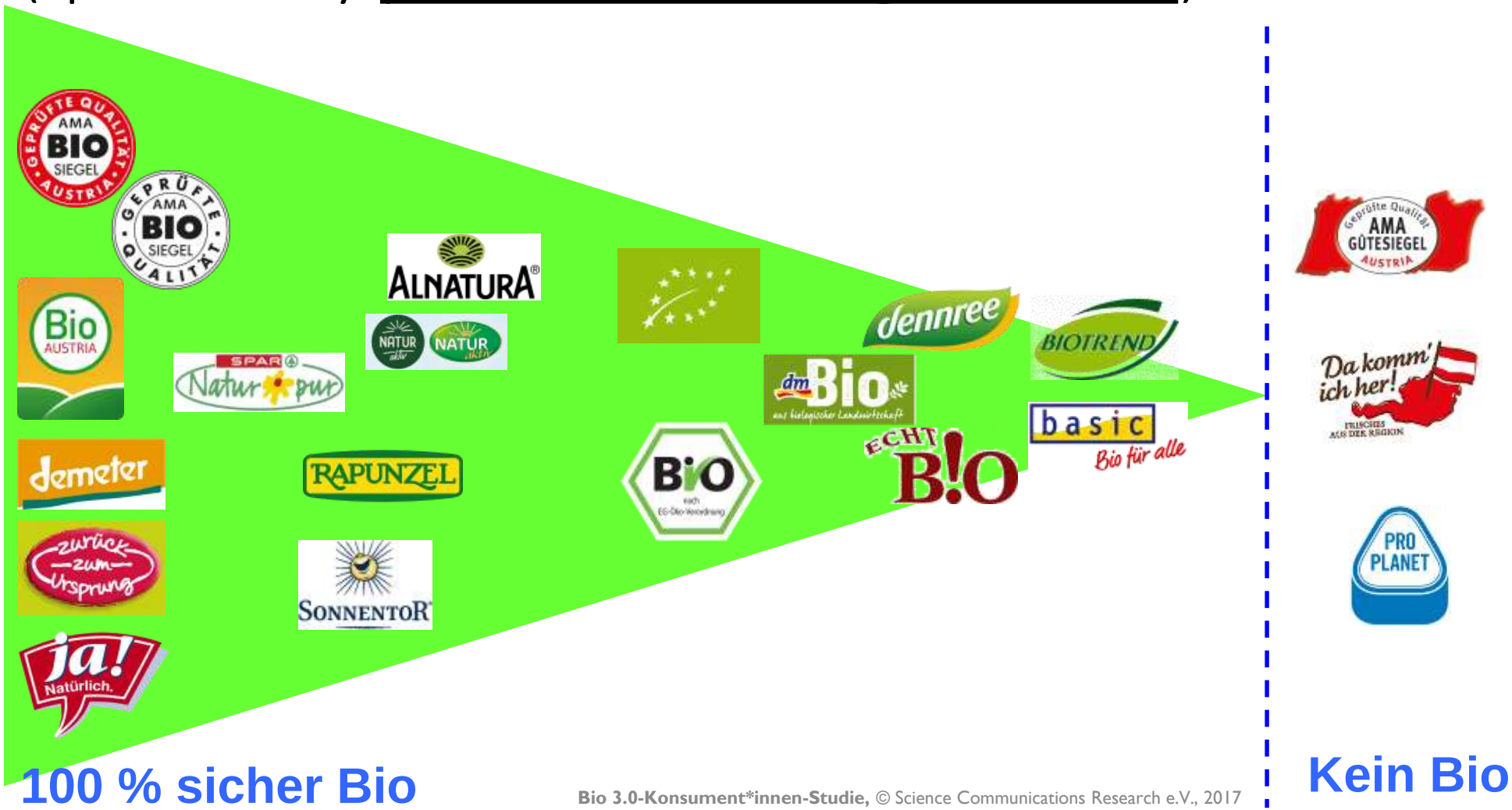
Little known

Well known

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



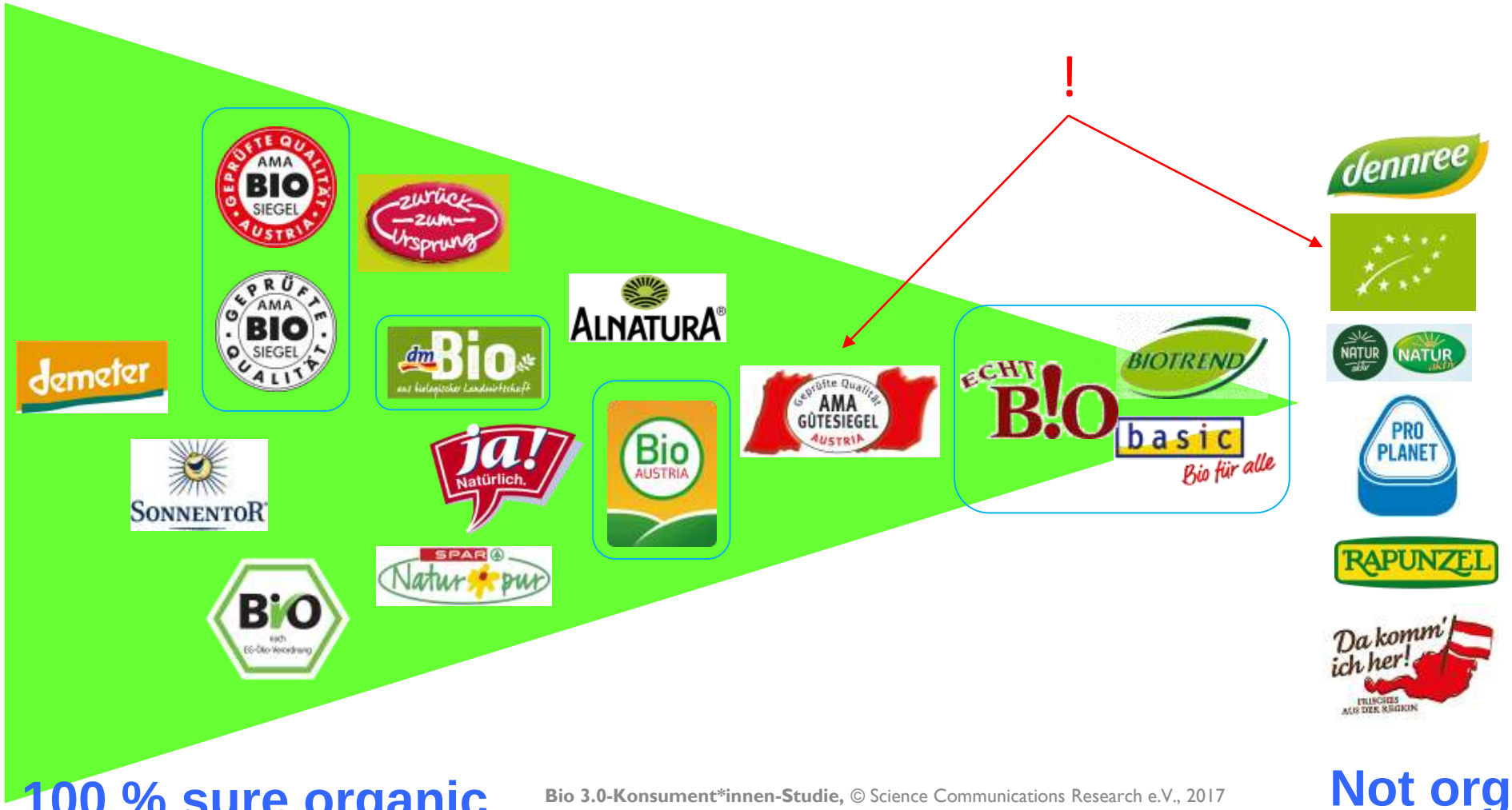
Organic classification – organic labeling and brands (queried by purchasers of organic food)



100 % sicher Bio

Kein Bio

Organic classification – organic labeling and brands (queried by consumers who refuse organic)



Frame = unknown, Classification because of seal or brand is named „organic“

100 % sure organic

Not 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**
- ✓ Relaiability of **legal regulations = 2 EU organic regulations**
- ✓ Relaiability of **Annual inspections** of each farm and sanctions for violations
- ✓ **EU-organic** is guaranteed **benificial** – organic plus is a bonus

Campaign Bio 3.0 – www.biodreinull.at

Excerpt from:

Franke-Petsch. F., Martos, A. (2017): Bio 3.0-Konsument*innen-und -Imagestudie Phase 1 2016-2017, Freiland Verband.