The committed organic consumer

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***Abstract* - UK committed organic consumers are reported to be about 23 per cent of consumers and account for 84 per cent of organic sales. This paper compares the committed organic consumer who is also a member of the UK's national charity for organic growing (HDRA), to committed organic consumers in the wider UK population. Broad parallels were found between these two groups of consumers although there were differences in purchasing drivers as environmental issues were relatively more important to HDRA members than other committed organic consumers. There was also a higher prevalence of vegetarianism and gardening in the HDRA sample. Yet consumer preferences are dynamic and there is perhaps no single, stereotypical, organic consumer.[1]**

INTRODUCTION

The UK organic market has grown rapidly in recent years to become one of the biggest in the world, with annual sales in excess of £1bn. For this growth to continue it is important to understand who buys organic food, and why. It is generally well accepted that the majority of UK organic purchases are made by a core of committed organic consumers (Padel and Foster, 2005; TNS, 2003; Williamson and Cleeton, 2005) and 84 per cent of organic sales are purchased by 23 per cent of consumers (DEFRA, 2004). Zanoli (2004) identified the distinction between committed and occasional organic consumers in most European countries. Hence the market relies on the purchases of a committed minority.

This paper compares characteristics of committed organic consumers in the general UK population to committed organic consumers who are members of HDRA, the national charity for organic growing. HDRA is an UK organic gardening charity with about 31,000 members. An HDRA survey found responding members to be middle aged or older (58 per cent over 56 years), pragmatic organic gardeners who were concerned about environmental issues. They were keen to promote organic principles, interested in recycling and in developing their own organic gardening skills (most respondents had been gardening for more than 10 years). When considering fruit and vegetables 72 per cent professed to grow some and buy some, organic if possible.

During 2004 over 300 self-selecting HDRA members completed a further questionnaire on their behaviour as organic vegetable consumers. This is compared to research on organic consumers in the wider population.

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METHODS

HDRA participating members completed a questionnaire on background information about the participant and their household. They answered precise questions about their behaviour as organic consumers – focusing on organic vegetables. Questions included weekly spend on vegetables, percentage of organic vegetables bought, factors to encourage purchasing and where and how regularly they bought organic vegetables. This information was analysed and combined with a brief literature review of research into committed organic consumers in the wider UK population.

COMMITTED ORGANIC CONSUMERS

Committed buyers tended to be older and more affluent than the UK population average, over two thirds were in social classes A, B or C1, compared to under 50 per cent in the population at large and most lived in London and the South East (TNS, 2003; Padel and Foster, 2005). The majority of committed organic consumers spend was from the two groups of empty nesters whose children have left home and families with children under 5 years (TNS, 2003). TNS (2003) found fruit and vegetables were the main entry point to organic purchasing as 55 per cent tried them before any other category.

Padel and Foster, (2005) identified that committed organic consumers took on a greater number of issues and motives, which varied depending on the product category. The two most important motivations were taste and health. TNS (2003) reported there was a "direct correlation between the extent to which consumers believe in the health and taste benefits of organic food and the number of categories they buy into". Padel and Foster (2005) found personal health was a particularly strong driver among UK consumers and related it to an absence of residues and food safety although Zanoli (2004) identifies that across Europe health seemed to be the central motive for buying organic produce. Environment and animal welfare were growing in importance as drivers (Padel and Foster, 2005). Food origin was particularly important as 60 per cent of organic consumers were more likely to buy organic food if it originated from the UK compared to 38 per cent for whom it didn't really matter (TNS, 2003).

Price was often found as a barrier to purchasing although committed buyers had a higher willingness to pay (TNS, 2003). This is common across Europe (Zanoli, 2004). Organic consumers bought organic food an average of 12.8 times a year and average spend per shopping trip was £2.53 (TNS, 2003). Committed buyers spend more on average and buy more frequently than less committed buyers. The majority bought organic produce in Tesco, Sainsbury's and Waitrose.

HDRA MEMBERS AND COMMITTED ORGANIC CONSUMERS

Respondents to the HDRA survey were assumed to be committed organic consumers as they were a member of an organic charity and volunteered for a consumer survey. Their profile had parallels to committed organic consumers in that average household sizes were small (2.05 person per household) and 80 per cent of respondents were over 40 years (one third were over 60) (Geen and Firth, 2005). Perhaps surprisingly, for committed organic consumers, only 40 per cent bought 80 per cent or more organic vegetables and only eight per cent bought 100 per cent organic vegetables. However this is supported by SQW Limited and ADAS Consulting Limited (2005) who indicate that committed organic consumers commit only 13.4 per cent of their food and drink spend to organic food. The majority of organic vegetable purchases (65 per cent) were from supermarkets. This may be lower than general committed organic consumers, reflecting a higher concern about imports and environmental issues. A higher willingness to pay among committed organic consumers was supported by environmental issues being ranked as more important than price.

Several factors marked HDRA committed organic consumers as slightly diverse to the 'typical' committed organic consumer.

89 per cent of respondents *grew their own vegetables* even if they only grew a few staples (Geen and Firth, 2005). Other studies have not examined a link between organic consumption and gardening but the nature of HDRA suggests the sample would have a high proportion of gardeners. However there could be a link between an interest in organic food and an interest in gardening. Likewise spend on organic vegetables, unsurprisingly, varied if participants grew their own vegetables or not (Figure 1).

A higher prevalence of *vegetarianism* was found among HDRA committed organic consumers than general committed organic consumers (Geen and Firth, 2005). Similarly TNS (2003) found a higher prevalence of vegetarians among organic consumers than in the general population.

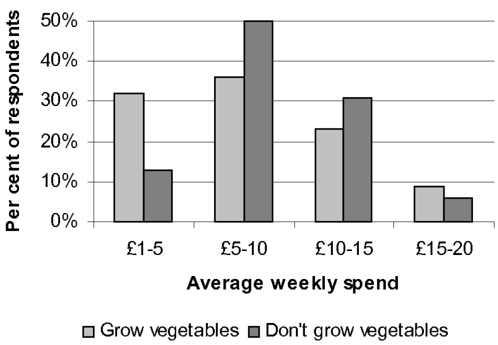

Figure 1. Average weekly spend on organic vegetables of HDRA members

Environmental issues, although high in importance to general committed organic consumers, were of key importance to HDRA committed organic consumers. Concern about imports, food miles and recyclable or biodegradable packaging were cited as influential reasons for buying organic food.

VARIETY AND DYNAMIC

The committed organic consumer is a group that has been repeatedly identified, however every consumer within this group is likely to be different with only averages reported. As SQW Limited and ADAS Consulting Limited (2005) identify "there are as many motivations as there are consumers". Additionally surveys often examine stated behaviour rather than actual purchasing behaviour. Padel and Foster (2005) highlight the discrepancy between consumer willingness to buy and actual purchasing behaviour.

Additionally new experiences and knowledge, such as food scares, are likely to lead to consumers constantly reanalysing their demands and decisions.

CONCLUSIONS

HDRA members largely reflect the profile of committed organic consumers. However several factors such as increased environmental concerns and higher prevalence of gardening and vegetarianism differentiate HDRA members.

ACKNOWLEDGEMENTS

Thanks to all HDRA members who participated in the Supermarket Watch survey. Also to Bruno Madec for his help in analysing the data.

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