



The Committed Organic Consumer

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May 06

Outline



Organic market background



HDRA and Supermarket Watch

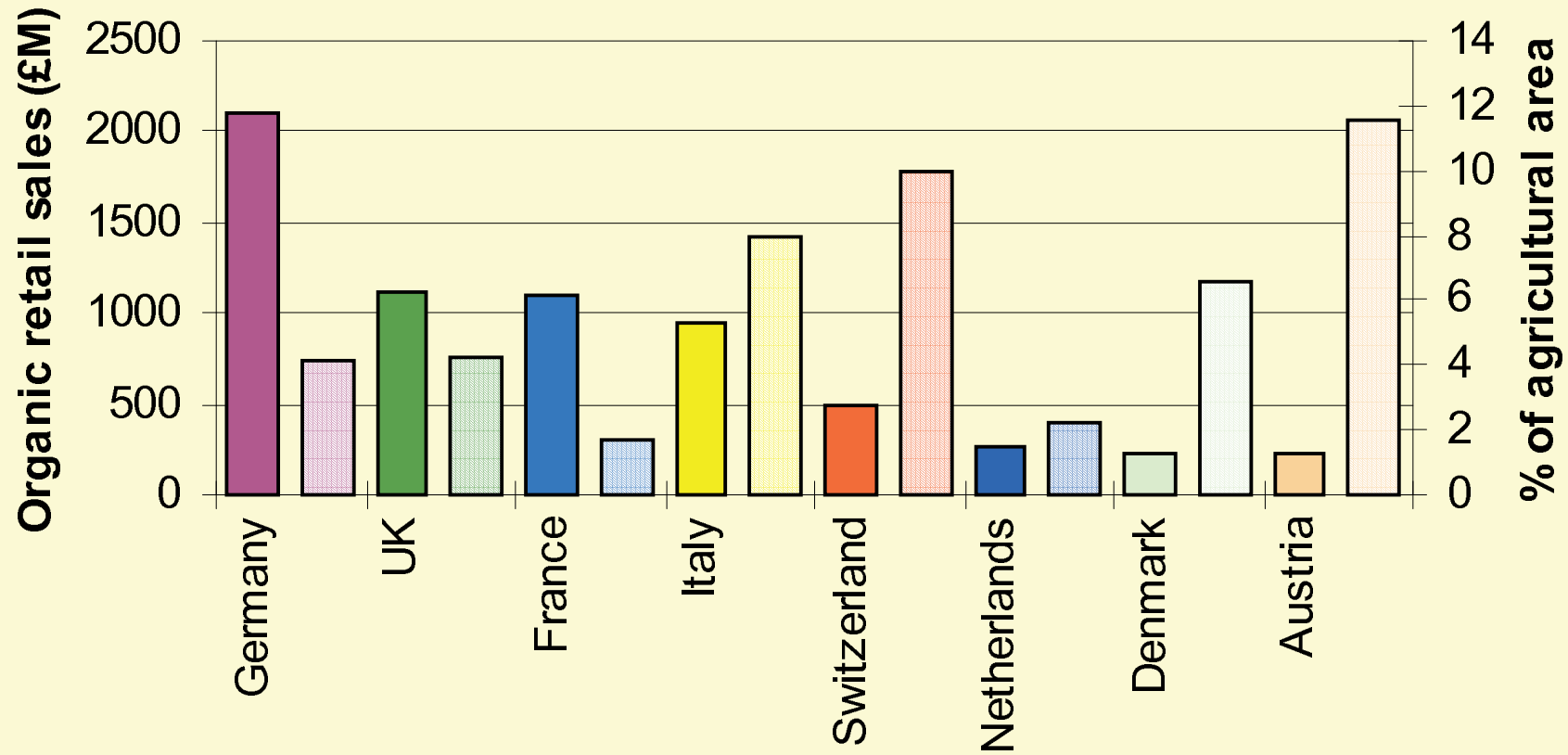


Committed organic consumerss



HDRA members as committed organic consumerss

European organic market

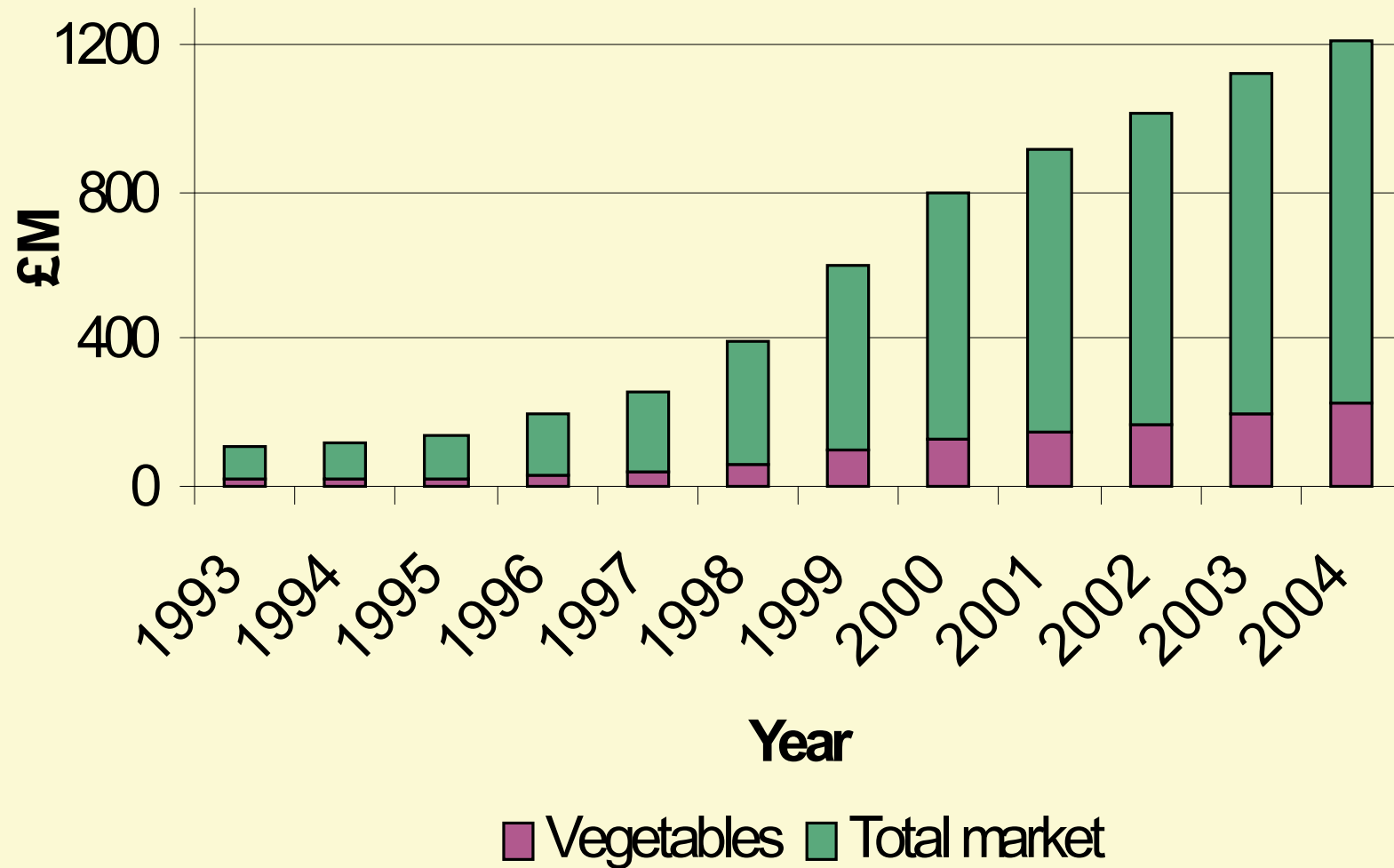


Source: Soil Association, 2004



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UK organic market value



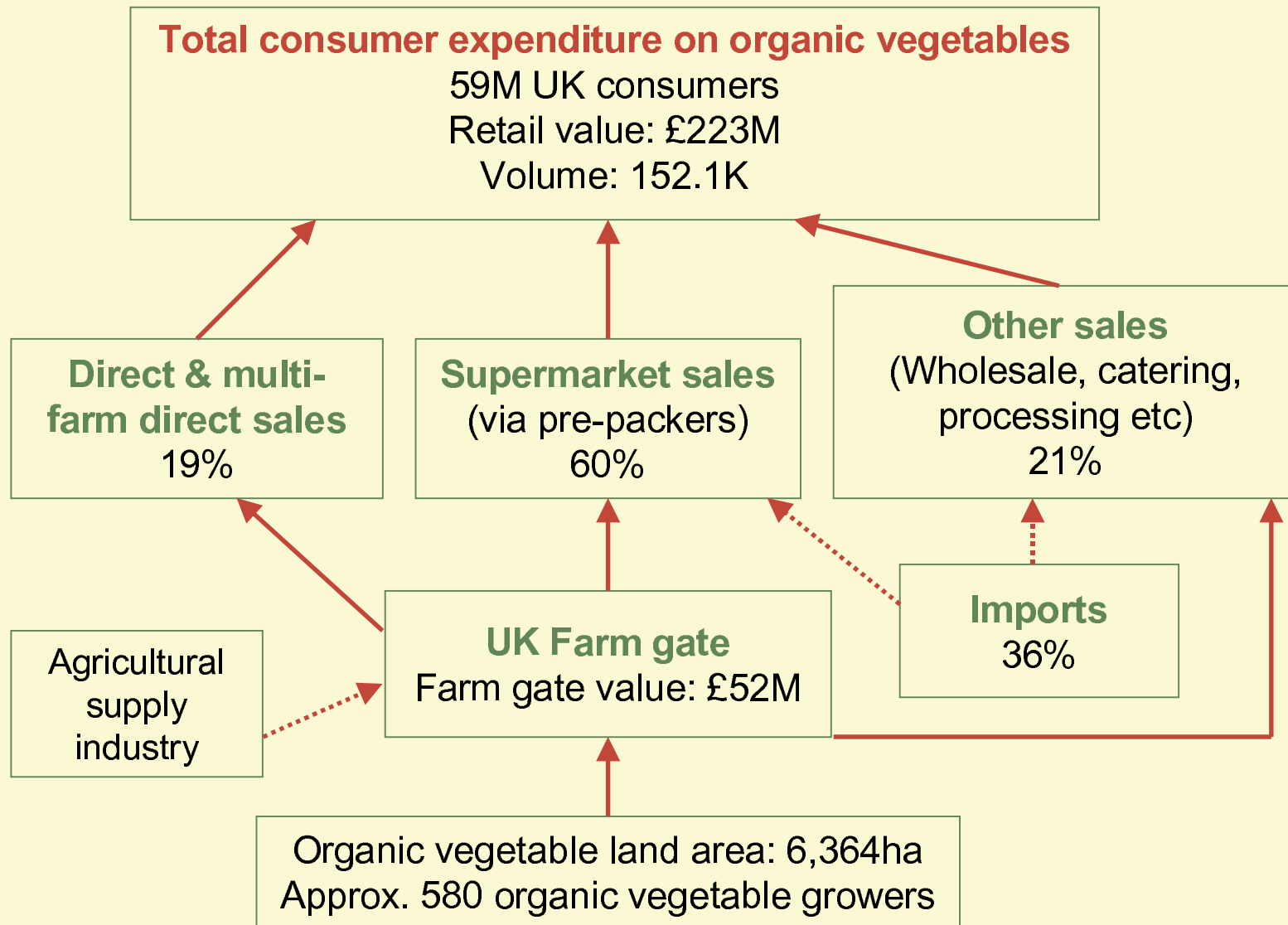
Source: HDRA, 2006



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UK organic vegetable market (2004-05)

Distribution involved in all parts of the supply chain



* Number of organic growers based on Soil Association certified vegetable growers and their share of the total UK certified and in-conversion farmers.

HDRA

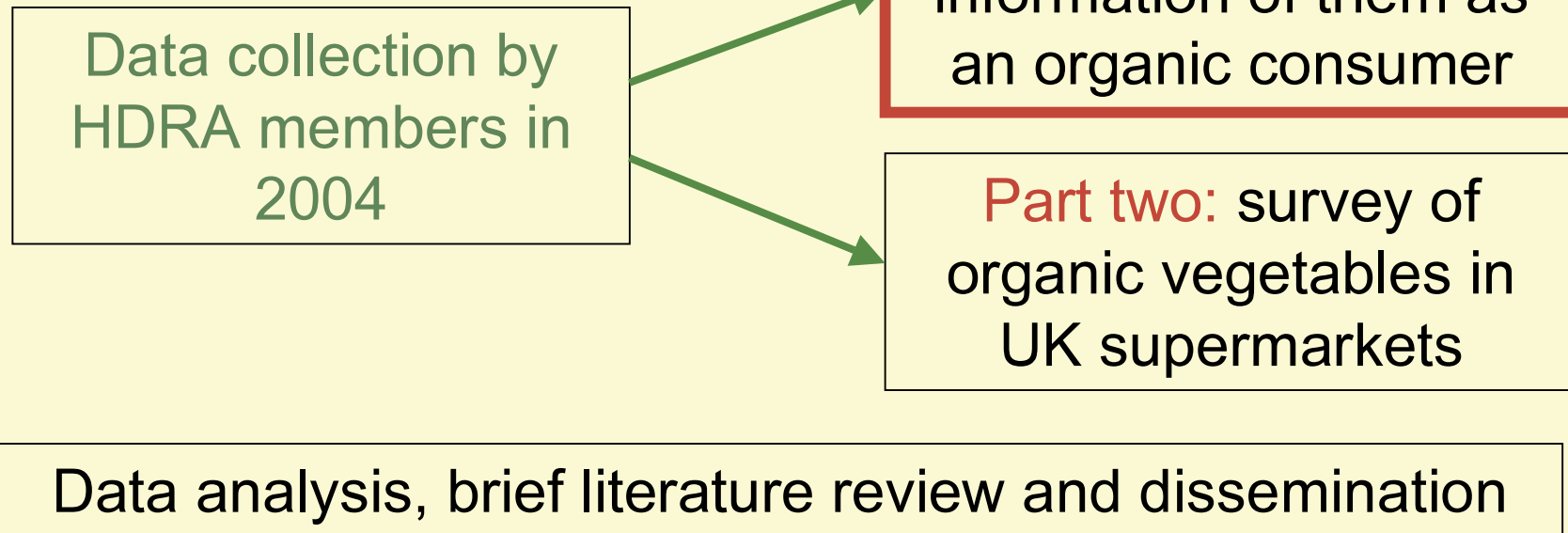
- Founded in 1958
- One of Europe's largest organic membership organisations
- Researches, collates and disseminates information about organic growing and food, focusing on horticultural land management



Supermarket Watch

Aim: To improve understanding of why and where HDRA members bought organic vegetables and to determine the origin and price of organic vegetables in UK supermarkets throughout 2004

Approaches:



Supermarket Watch

Questionnaire on:

- Weekly spend on organic vegetables
- Percentage of organic vegetables bought
- Factors to encourage purchasing
- Where and how regularly organic vegetables were bought

Who are committed organic consumers?

Families with children under 5 yrs
Empty nesters



(TNS, 2003)

High number of issues and motives

(Padel and Foster, 2005)

High willingness to pay

(Zanoli, 2004)

Social classes A, B or C1 / educated / affluent

(TNS, 2003)

Buy in supermarkets

(Geen and Firth, 2005)

Characteristics of UK committed organic consumers



Live in
London and
the South
East

(Padel and Foster, 2005)

84 per cent of organic
sales purchased by 23 per
cent of consumers

(DEFRA, 2004)

Fruit and
Vegetables a key
entry point

(TNS, 2003)

Motivations

(Padel and Foster, 2005)

HDRA members

32,000
members

Middle-aged
or older



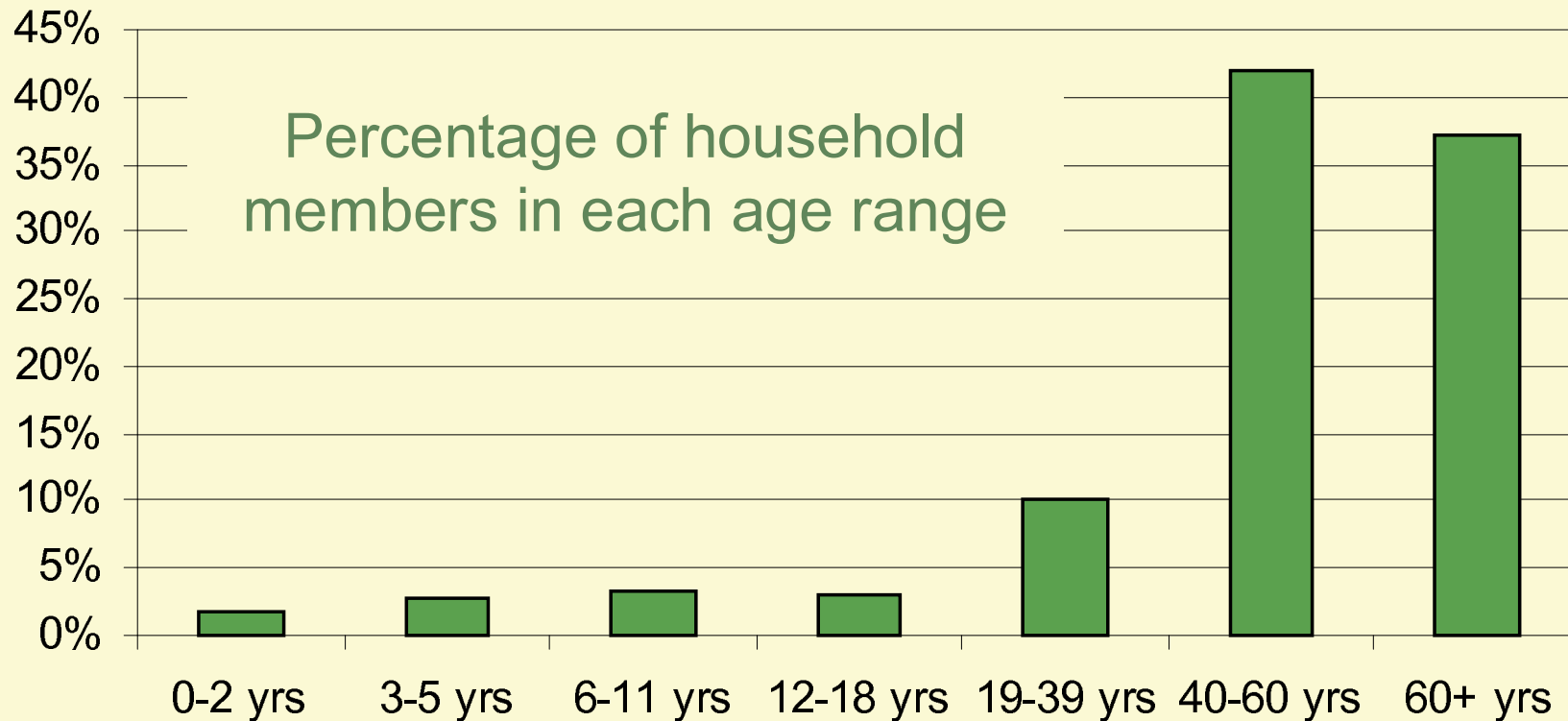
Organic
gardening
charity

Pragmatic
organic
gardeners

Interested in
organic principles
and recycling

Households

Aging (80 per cent over 40 yrs)
Small (average 2.05 persons)

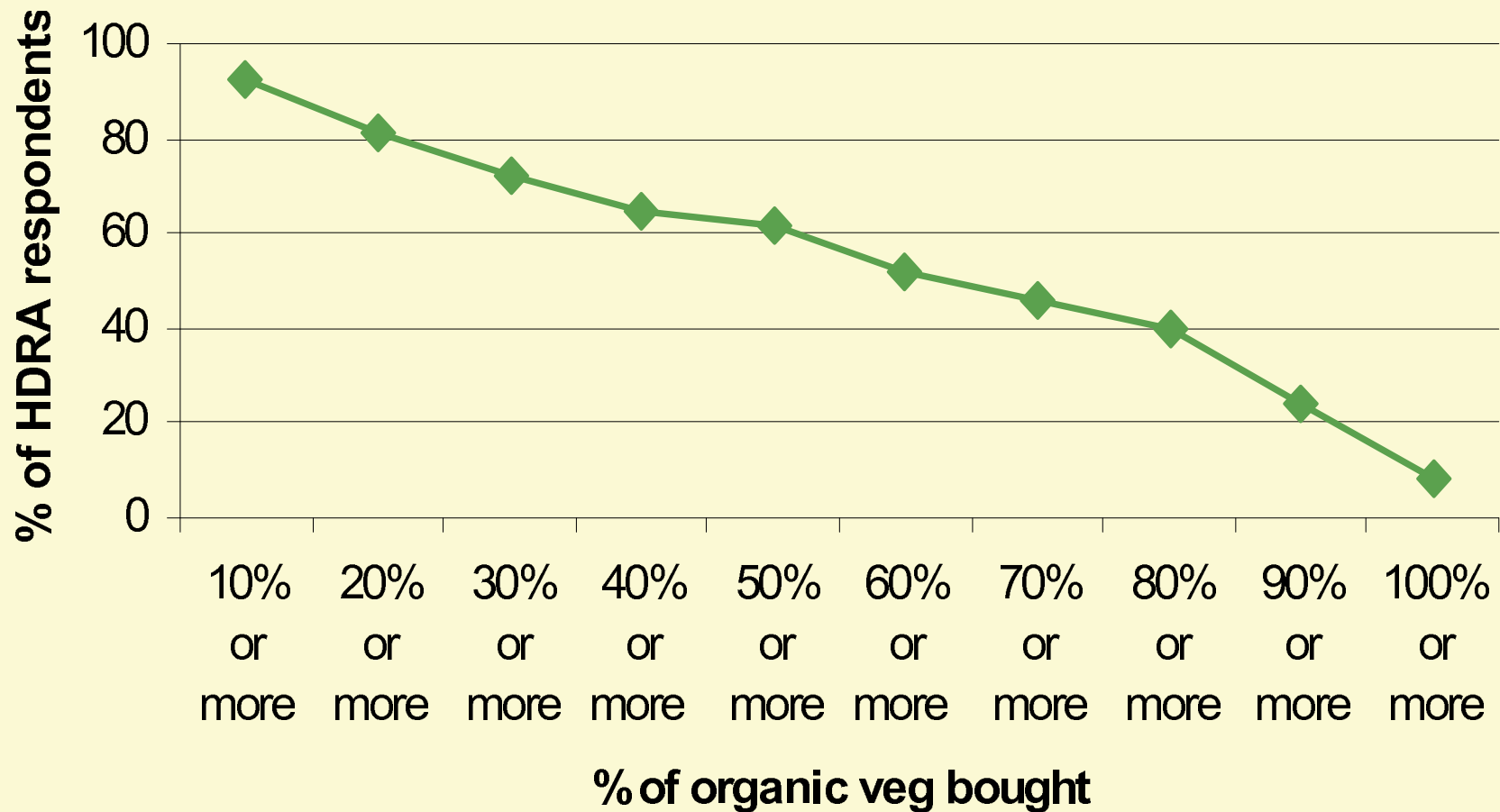


Data from HDRA Supermarket Watch, 2005



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Purchasing level



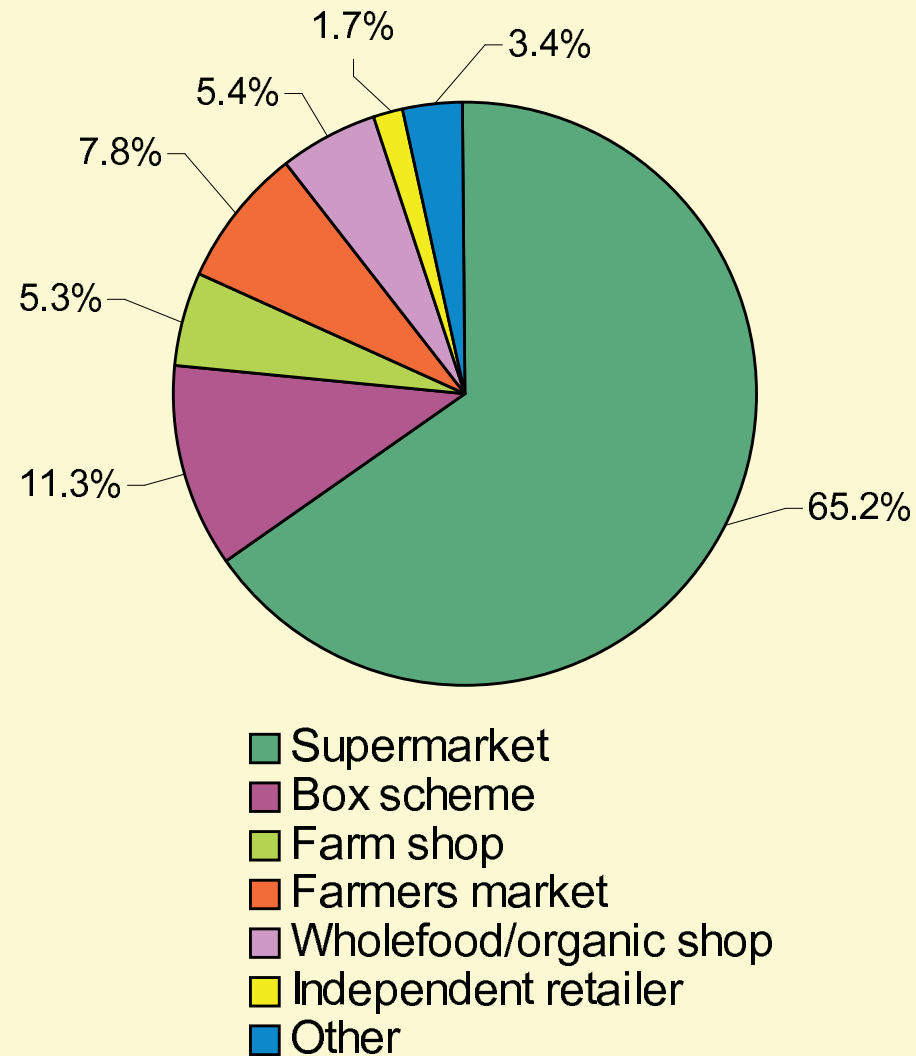
Data from HDRA Supermarket Watch, 2005

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Purchasing outlet

On average HDRA members bought two thirds of organic vegetables in supermarkets



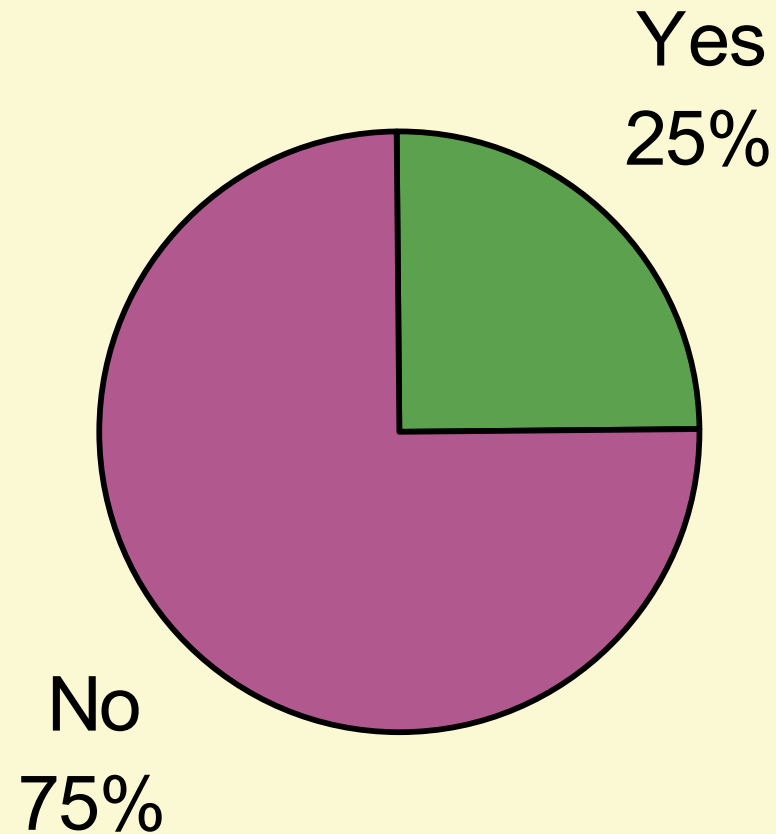
Data from HDRA Supermarket Watch, 2005

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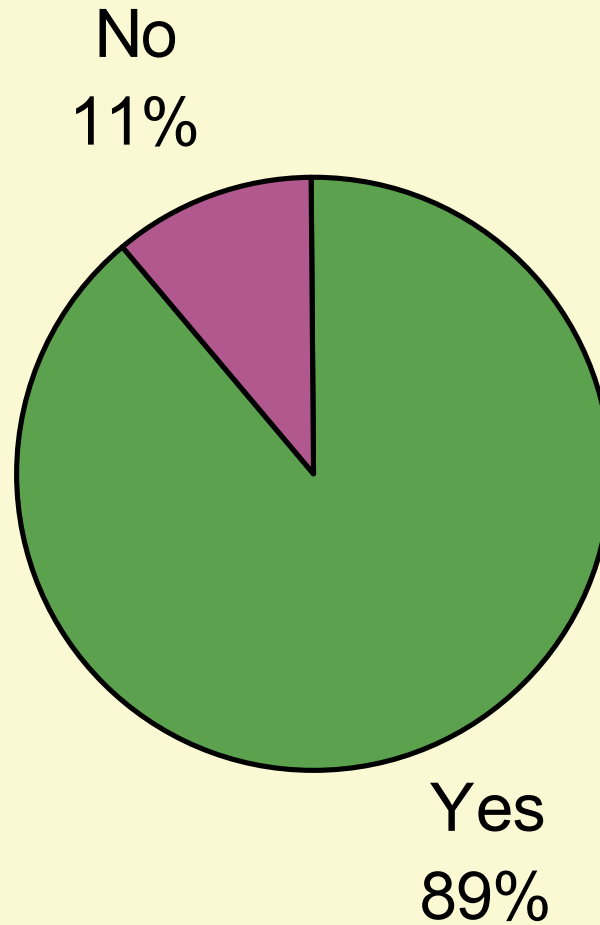
Vegetarianism

Are HDRA organic consumers vegetarians?



Vegetable growing

Do HDRA organic consumers grow their own vegetables?



Data from HDRA Supermarket Watch, 2005



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Motivations

Environmental
issues

Packaging
Issues



Sourcing
issues

Summary

Similarities	Differences
Empty nesters	High vegetarianism
Relatively high purchasing level	High vegetable growing
Purchase from supermarkets	Strong environmental motives
???	???

Varied and dynamic

□ Horrified at proportions of vegetables coming from abroad. I didn't realize quite how much until I started recording it □

HDRA Member

□ I am worried about the amount of packaging of organic vegetables, a lot of which seems not to be recyclable. □

HDRA Member



More information

Questions?

Reports

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