CONDOR

Consumer Decision Making on Organic Products




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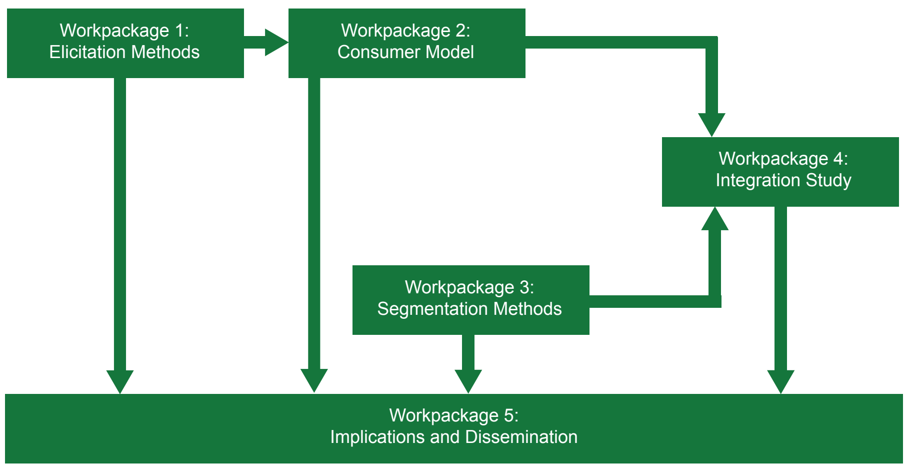
Project Number: QLK1-2002-02446

PROJECT AIMS AND STRUCTURE

THE CONDOR PROJECT

The market for organically produced foods in Europe, while increasing in recent years still remains relatively small. This project makes a systematic and scientific examination of consumer decision-making processes involved in the choices between organic and non-organic, fresh and processed foods. It brings together a multidisciplinary team from eight EU member states (Denmark, Italy, Finland, Germany, Greece, Spain, Sweden, and the UK) in a three year project, completed at the end of 2005.

Methods for the elicitation of salient beliefs, including affective (emotional) associations and moral concerns, were developed, as was a theoretically based consumer decision-making model and methods for the segmentation of consumers based upon values. This gave information on the role played by values and beliefs, feeding into the marketing of organic foods.



Project Structure

MAIN OBJECTIVES

- To provide a basic understanding of the processes involved in consumer decision-making on the purchase and consumption of processed and fresh organic foods

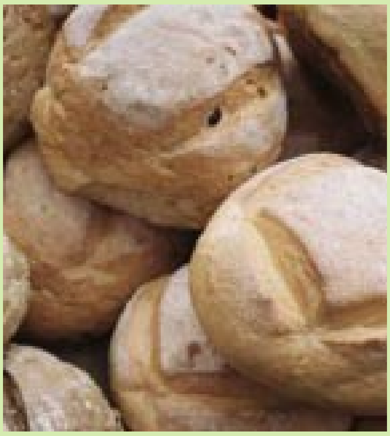
- To model consumer choice of organic foods based on attitudes, values, and beliefs, including affective and moral concerns

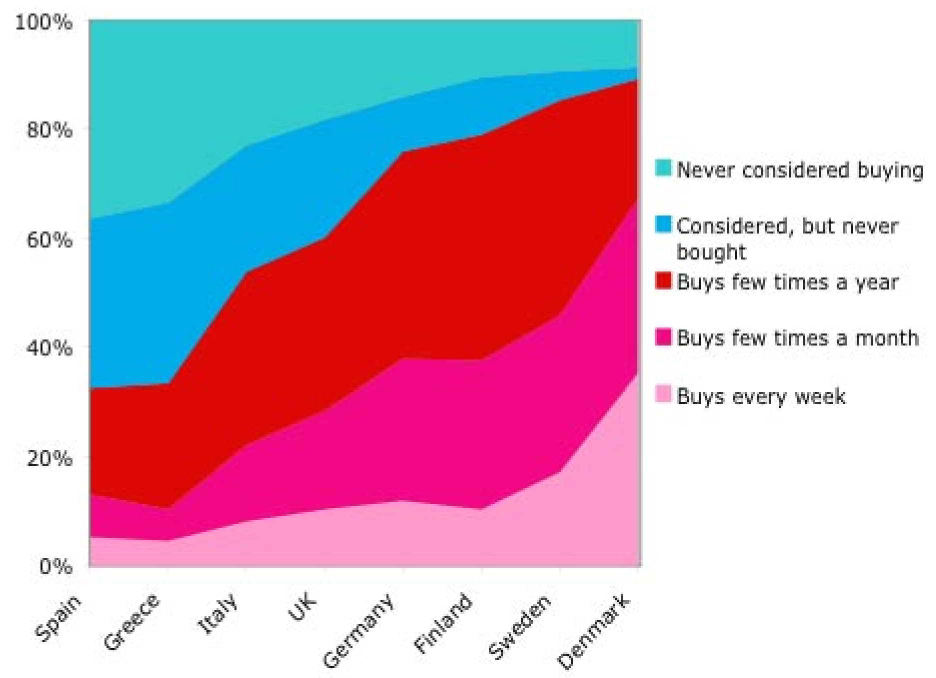
The five integrated workpackages cover the development of common methods of collecting consumers' views, creating a model of consumer choice, segmentation analysis, cross-country comparative study, and the dissemination of results to industry, NGOs, policy makers and the general public.

For further information and more detailed results visit:-
www.condor-organic.org/

RESULTS

Organic consumption across Europe has now entered the mainstream, no longer is it restricted to specific kinds of consumers. Whilst the organic market is less than 10% of total food spend, it is significant and in many EU countries is set to grow.





Comparison of purchasing patterns for organic food

What consumers told us about their shopping habits in 8 EU countries

Evidence from mature organic markets, such as Denmark, demonstrates that once a good variety of organic products become available in a number of outlets, consumers do purchase and convert to organic foods.

Our results indicate that to ensure growth in the organic market – in both the fresh and processed foods sectors – priority one should be getting the supply chain right, making the foods more widely available. The next step is understanding (organic as well as non-organic) consumers, identifying their belief structures regarding organic foods, and using this insight to overcome mistrust and uncertainty through labelling and other types of information, thereby encouraging initial use.

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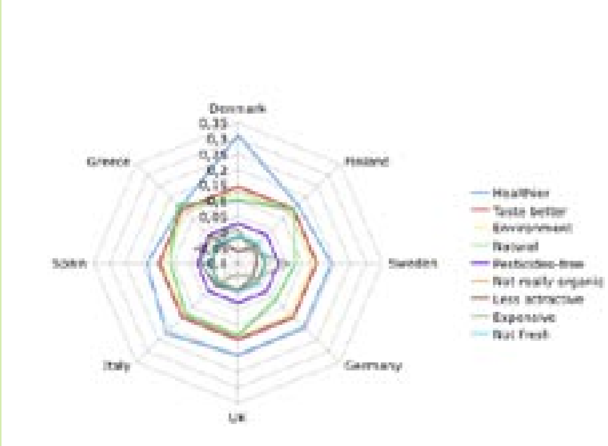
ORGANIC CONSUMERS' BELIEFS

CONDOR research with over 8400 consumers across Europe found that the reasons why consumers buy, and the reasoning behind their purchases, are very similar across countries as different as Greece and Germany, Spain and Denmark.

What sets organic consumers apart from non-organic consumers, right across the eight countries studied, is not so much age, gender, education or income, rather what they think and feel about organic foods, be they fresh or processed, and the belief in the benefits that these foods provide.

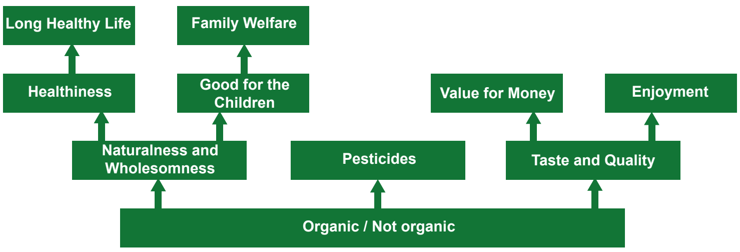
Users of organic foods have more positive beliefs than non-users. For example, improved taste, being more 'natural', making a contribution to a longer healthier life, creating beneficial outcomes for the environment and society as a whole, are seen as the key benefits. However, users and non-users were unanimous about possible negative aspects of organic foods, such as higher price and lower shelf-life. Further, whether consumers trusted in organic food or not was independent of the use of organic foods. Additionally, organic consumers believe that by following their organic purchasing habits they are doing the right thing, and are seen to be doing so by friends, family and neighbours.



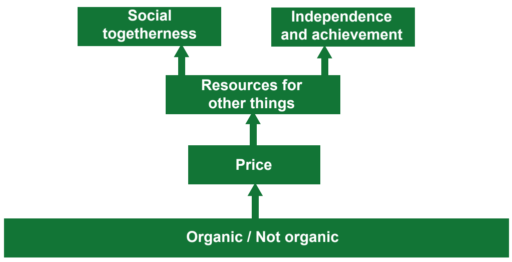
Consumers' beliefs about organic foods
The bigger the web the greater the influence on choice

The more people thought that organic was healthier, was better for the environment and tasted better – the more positive they felt about buying it. Negative beliefs towards buying organic food, overall, were insignificant

Regular consumers of organic foods have more complicated belief structures, attitudes and values than non-organic consumers. Attitudes towards fresh as well as processed organic foods were mostly positive.



Belief structures for British organic consumers



Belief structures for British non-organic consumers

For further information and more detailed results visit:- www.condor-organic.org/

OVERALL CONCLUSIONS: WHAT DO CONSUMERS THINK?

CONSUMERS' ATTITUDES TO ORGANIC FOOD

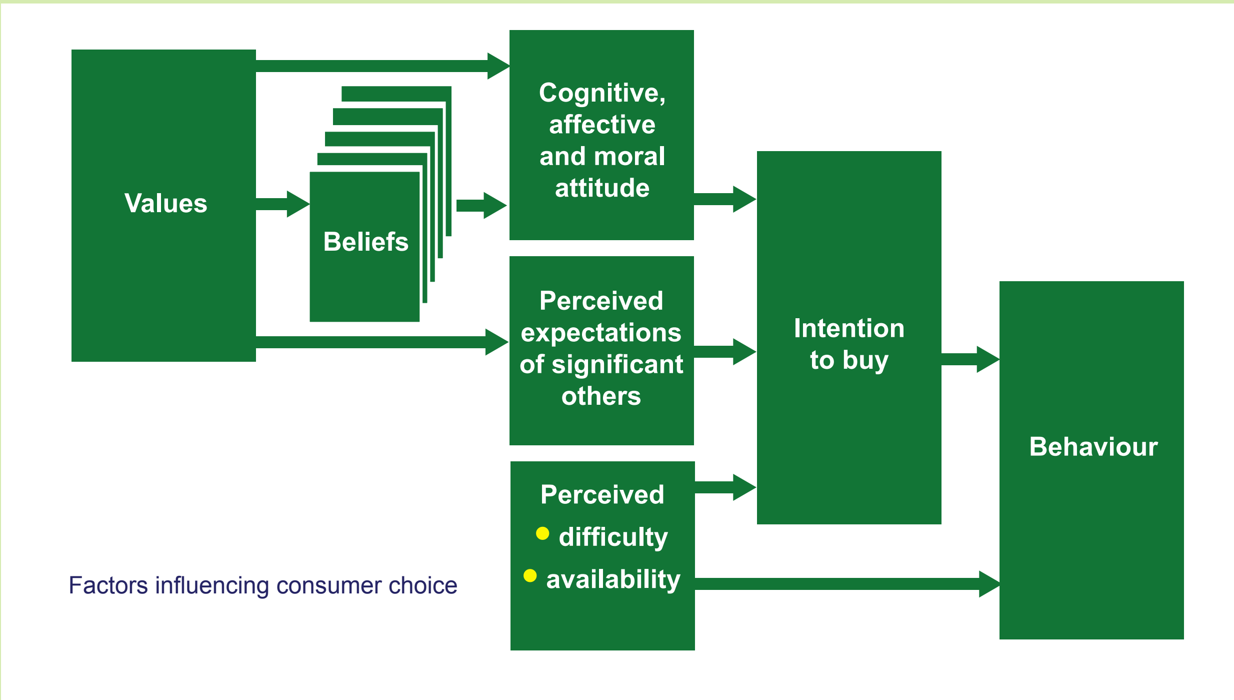
Irrespective of whether consumers buy organic foods or not, overall in all 8 countries, they have many positive and fewer negative associations to organic foods. This leads to the conclusion that the main marketing messages could be the same for all consumers based on their positive belief structures.

MARKETING MESSAGES

Health and taste are important factors when buying all foods. However, when buying organic foods, in addition to health and taste, a positive consequence for the environment and associated positive moral values are important attributes that differentiate organic foods in the market place.

PRICE AND AVAILABILITY

If a consumer believes in the benefits of organic foods, price is not necessarily a barrier to purchase, whereas availability often is. The more organic food is available the more consumers buy, signalling that the more organic foods retailers provide, the more they will sell as consumer familiarity and confidence grows.



Factors influencing consumer choice

COMMUNICATING ORGANIC MESSAGES

Consumers need more and better information that they trust, to be sure that they are buying organics. Better labelling to validate organic credibility is essential, especially where levels of trust in organics are lower in Southern EU countries.

OVERALL

Getting inside the heads of non-organic consumers, using the belief structures identified, overcoming mistrust and uncertainty, and encouraging initial use, coupled with getting the supply chain right, will ensure growth in the organic market – in both fresh and processed foods sectors.

Our research identified that common belief structures exist across the EU: the clear message is that what has worked before in some markets will work again in others. This is a strong message for both pan-European and home market producers, manufacturers and retailers of organic foods.

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Project Website
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