

2003 BC Organic Food Survey: Key Findings

Source: Synovate Research, 2003.

How much are shoppers buying?

Organic foods have penetrated the BC grocery market such that more than 50% of grocery shoppers have purchased at least a small amount of organic food during their grocery shopping over the last year. Further, most shoppers predict they will continue to buy as much or more organic foods in the future.

- **In BC, just over one-half (53%) of all grocery shoppers have purchased some type of organic food in the past year, with organic food accounting for an average of 11% of all food purchases.**
- In terms of a percentage of total food purchases, BC shoppers estimate that on average, **one year from now, 17% of their food purchases will be organic** compared to their current estimated organic purchases of 11%.
- Although four or five in ten light, medium and heavy organic purchasers plan to buy more organic food next year, **the biggest estimated jump in organic purchases is forecasted by medium and heavy purchasers: 10% more.** Light purchasers predict a more moderate increase in their organic purchases.
- **Organic food purchasers typically buy their organics at their primary grocery stores, mainly Save-On-Foods, Safeway, the Real Canadian Superstore, and on Vancouver Island, Thrifty Foods.** Heavy organic purchasers tend to also frequent farm markets for their organic produce.
- The survey results are, interestingly, virtually duplicated in a recent poll of American grocery shoppers (54% of Americans have bought organic food in the past year). The survey was commissioned by Whole Foods, results at: http://www.wholefoodsmarket.com/company/pr_10-14-03.html

Why are people buying organic?

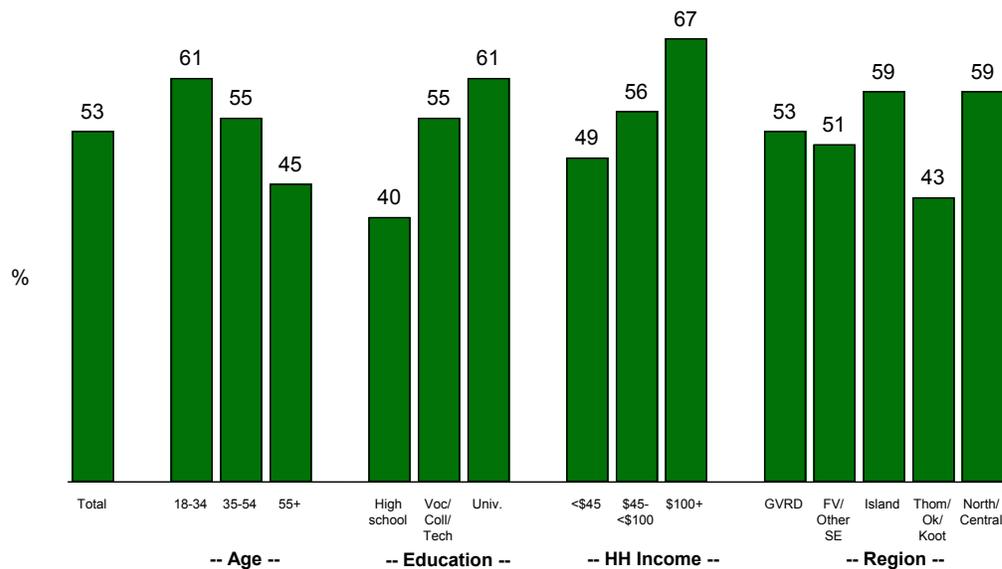
- **For organic food purchasers, the primary motivators for buying organics are health and nutritional reasons (e.g. the absence of chemicals) and taste. Taste is particularly relevant to those who buy organic meat, poultry, dairy or eggs.** Interestingly, light organic purchasers are motivated by taste more so than medium to heavy purchasers, the latter being more focused on the health and nutritional reasons for buying organics. **Sixty one per cent of both current and prospective organic food purchasers tend to agree that organic food is much healthier.** Fifty one per cent of those polled expect it to taste better than non-organic food.
- **When it comes to what “certified organic” means to current and prospective organic purchasers, the majority say that, to them, it means the food has been grown, raised or made without chemicals, pesticides, chemical fertilizers, preservatives or hormones.** A smaller number (one in five) believe “certified organic” means that the food has been inspected or guaranteed to be organic. Generally, current and prospective organic food purchasers trust that if food is labeled “organic” then they trust it is made/grown without chemicals or pesticides.

Who is buying organics?

- **Organic food buyers can best be characterized by their age (they tend to skew younger), their education (they are more apt to have some type of post-secondary schooling) and their household income (they tend to earn more than average).** Regionally, they have a particularly strong presence on Vancouver Island and a particularly low presence in the Thompson/Okanagan/Kootenay region.

In the past 12 months, have you purchased any organic food, such as fruit and vegetables, meat, poultry, dairy, eggs, grains or cereal products, or packaged grocery items?

- % Yes -



- **In terms of organic purchasing,** the BC market can be broken down as follows:
 - 17% are light organic purchasers
 - 19% are medium organic purchasers
 - 16% are heavy organic purchasers
 - 47% are non-organic purchasers (of which 5% are “prospective” purchasers)

What organics are people buying?

- Among the various types of organic food products purchased, fruits and vegetables tend to be the most common. Out of the last five shopping trips taken by BC grocery shoppers, an average of 1.4 trips included purchasing organic fruits and vegetables.

Further, among heavy organic purchasers, four out of their last five shopping trips included buying organic fruits and vegetables.

- Comparatively, the next most common organic categories, dairy/eggs and grains/cereal products, are each only purchased an average of less than once out of five shopping trips.
- Organic meats/poultry and packaged foods/prepared meals are relatively less commonly purchased. Both of these organic food types being bought much less often than once out of the last five shopping trips.
- As one would expect, heavy organic food purchasers are most apt to be buying all types of organic foods, with the level and volume of purchases declining consistently across the medium and light groups.

Out of your last five shopping trips, how many times, if any, did you purchase organic...

| | <u>Current Organic Purchasing</u> | | | |
|----------------------------------|-----------------------------------------------|--------------|---------------|--------------|
| | <u>Total</u> | <u>Light</u> | <u>Medium</u> | <u>Heavy</u> |
| Base | 852 | 140 | 158 | 136 |
| | <u>Average # Of Times Out Of Last 5 Trips</u> | | | |
| Fruits & vegetables | 2.6 | 1.3 | 2.6 | 4.1 |
| Dairy or eggs | 1.5 | 1.0 | 1.4 | 2.3 |
| Grains or cereal products | 1.1 | 0.5 | 0.8 | 1.9 |
| Meat or poultry | 0.7 | 0.2 | 0.3 | 1.6 |
| Packaged foods or prepared meals | 0.6 | 0.2 | 0.4 | 1.2 |

Methodology

In total, 852 telephone interviews were conducted with BC adult grocery shoppers, aged 18 or older. The sample was stratified by region to ensure a population proportionate sample. As with all sample surveys, the results are subject to margins of error. The total results, with a sample size of 852 are accurate to +/- 3% at the 95% level of confidence. When analyzing results from various sub-groups, such as by organic food purchasing groups, the margins of error increase as the sub-samples are smaller.

The organic food purchasing segment definitions are as follows:

- Non-organic food purchasers - have not purchased any organic food in the past 12 months.
- Light organic food purchasers – have purchased organic food in the past 12 months and estimate that between 1% and 9% of their food purchases are organic.
- Medium organic food purchasers – have purchased organic food in the past 12 months and estimate that between 10% and 24% of their food purchases are organic.
- Heavy organic food purchasers – have purchased organic food in the past 12 months and estimate that 25% or more of their food purchases are organic.

About the COABC

COABC (Certified Organic Associations of British Columbia) is an umbrella organization representing provincial organic certifying agencies and is designated under the Food Choice and Disclosure Act to implement the British Columbia Certified Organic Program.

Organic describes a process of food production that avoids the use of synthetic inputs such as chemical fertilizers, chemical pesticides, chemical growth regulators/hormones and antibiotics.

Organic Production is based on a system of farming that uses production methods that minimize the impact on the environment. The primary focus is to maintain a healthy soil and develop a balanced farm ecosystem that is environmentally sustainable.

British Columbia Certified Organic means that a product identified by this phrase and/or symbol was produced according to guidelines and standards established by the Certified Organic Associations of British Columbia, in collaboration with the Ministry of Agriculture, Fisheries and Food. These government-approved standards and system of farm inspections form the basis of the British Columbia Certified Organic Program.

Campaign Sponsors

The marketing research conducted by Synovate is a component of COABC's province wide marketing planning initiative. The overall goals of this marketing initiative are to create consumer awareness for organic food leading to increased sales of organics in BC. This 18 month project is funded by the Agrifood Futures Trust Fund (a joint initiative of the federal and provincial governments) and the following BC companies: Avalon Dairy, Bradner Farms, Capers Community Markets, Choices Markets, Fountainview Farm, Fraserland Organics, Happy Planet Foods, Nature's Fare Natural Foods, Nature's Path Foods, Pro Organics Marketing, Saltspring Roasting Coffee, Small Potatoes Urban Delivery, Thrifty Foods, VanCity/Ecotrust, and Wild West Organic Harvest.