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# Bridging the Gap Between Public Opinion Research and Consumer Marketing Research: Insights into U.S. Shoppers of Organic Foods

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### ABSTRACT

*The primary goal of this study embraces Hughner and team's (2007) directive to focus new research on the growing segment of occasional consumers of organic and natural foods, rather than limit the search for consumer insights to the small, elitist groups of deeply committed consumers. Research questions address the demographics, attitudinal, and behavioral characteristics that identify organic foods as a premium product. Primary recommendations for marketing practitioners include focusing on higher income consumers, especially married individuals, who live in highly populated areas; creating a pleasant shopping experience; promoting non-food related organic items, and investing in brand presence and salience.*

### INTRODUCTION

The beginning of the organic farming movement in the U.S. is typically associated with mid-twentieth century and J.I. Rodale, who founded the Rodale Research Institute and published the Organic Farming and Gardening magazine as a way to advocate for the use of non-chemical farming methods (SARE). The grassroots, decentralized approach to organic farming slowly made its way into the Organic Foods Production Act (OFPA, 1990), and the law regarding national standards for production and labeling of organic products was activated in April, 2001 (National Organic Program).

Some key concepts have been confirmed through the past twenty years of research regarding consumer attitudes, beliefs, and behaviors regarding organic food. However, there are some major arguments that still need to be negotiated and agreed upon in terms of labeling, policy-making, and supporting the organic food industry at the level of governments, corporations, consumers, and consumer organizations (Zander et al., 2015). The U.S. Department of Agriculture (USDA) emphasizes the "use of renewable resources, and the conservation of soil and water to enhance environmental quality for future generations" (USDA, 2007). Organic food producers are most concerned about labeling fraud and unfair competition; major retailers and associations in the organic food industry build on the concepts of premium quality and premium pricing; and consumers tend to prioritize arguments related to social and environmental responsibility (Aertsens, 2009; Schifferstein and Ophuis, 1998).

Where food is a means to address basic hunger, consumers tend to gravitate toward the lowest cost that justifies the goals and means. With organic food, however, hunger itself is elevated along the lines of careful awareness of the farm-to-table journey and all the ways, explicit or implied, in which consuming certain foods needs to be considered within the integral framework of health, taste, environment (Obach, 2015; Urban et al., 2012; Zhou et al., 2013). Given the

intense competition for consumers' time, attention, and shopping baskets, it is important to question the degree to which the organic food industry can continue to focus on the typical loyal consumer, and instead find ways to integrate organic foods with the perceptions and behaviors of a much broader audience (Hughner et al., 2007).

After Amazon, the largest U.S. online retailer, acquired Whole Foods Market, the largest U.S. retailer of organic and natural products, in 2017, it became imperative to explore organic and natural foods as a category serving a much broader demographic target, as well as the connections between demographics, food, and self-concept. Such insights would benefit marketing strategy for not only the largest retailers, but also smaller or emerging growers, and specialized retailers of organic and natural products.

This study is structured around the following two research questions:

*RQ1. What are the demographics, attitudinal, and behavioral characteristics that identify organic foods as a premium product?*

*RQ2: What are the implications for marketing practitioners?*

**Organic Market Summary**

The U.S. organic market grew almost thousand-fold, from US$78 million in 1980 (Miller, 1996) to almost US$50 billion in 2017 (OTA, 2017). The global organic market quadrupled from US$ 20 billion in 2002 (Fitzpatrick, 2002) to over US$80 billion in 2017 (FIBL, 2017). Today there almost 60 million hectares of organic agricultural land, with 45 percent of it located in Australia and Oceania. Lichtenstein, one of the smallest countries in the European Union, has the highest percentage of organic agricultural land in the world, at 37.7%. Of the 2.4 million producers of organic food in the world, one-quarter are located in India, Ethiopia, and Mexico. In terms of sales of organic products, the U.S. alone is responsible for almost half of the worldwide sales, followed by the European Union and China (FIBL, 2017).

U.S. sales of organic products amounted to about $49.4 billion in 2017, of which 91.5% represented organic food products, and the remaining 8.5% consisted of organic non-food categories such as cotton, cosmetics, household, and gardening products (Organic Trade Association 2017 annual survey). While the food segment of the organic industry has grown, so has the competition from 'humane' practices companies offering 'natural' products (McNeil, 2018). The top-three categories within the organic food market consist of fresh produce (as much as 90% of all sales), followed by dairy (eggs and milk) and organic beverages. Within the US food market, organic food accounts for 5.5% of all food sold in retail channels (McNeil, 2018).

According to a Nielsen on-demand syndicated panel on Category Shopping Fundamentals (Nielsen, 2017), consumers increasingly purchase their organic food products across the spectrum of supermarkets, conventional grocery stores, warehouse clubs, premier outlets for natural and fresh food, as well as discount grocery and mass supermarkets. The fast-moving

consumer goods (FMCG) category includes a broad array of organic foods, from fresh to frozen and processed juices, ice cream, sauces, baby food, produce, meat, and diary.

**Consumers of Organic Foods**

Much of the previous research stated that women are the primary shoppers of organic foods (Berlin et al., 2009; de Magistris and Gracia, 2008; Hughner et al., 2007; Pearson et al., 2010; Urban et al., 2012; Zander et al., 2014). A recent study from the Pew Research Center (2016) estimated that about 55% of consumers believe organic produce is better for health than conventionally grown produce; and about 40% of US consumers report that some or most of the foods they eat are organic (34% and 6%, respectively). Regarding shopping behavior, one-quarter of respondents had purchased organic food (including fruits, vegetables, meat, fish, grains, or packaged foods) about once in the past 30 days (24.5%), and almost half the respondents had done so so several times (45.3%). There was a slightly higher percentage of consumers reporting food purchasing that aligns with the 'buy local' consumption of fruits and vegetables (53.5%, several times). The study also explored connections between food and health. Three out of four respondents (74.2%) thought that healthy eating habits are very important for preventing a person from getting serious diseases such as cancer or heart disease--almost the same amount of people who said they have a somewhat healthy lifestyle (57.3%). Compared with twenty years prior, about 60% of the respondents thought people in the U.S. today pay more attention to eating healthy foods. While healthy eating habits was considered very important to improving a person's chances of a long and healthy life (72.8%), respondents were quick to admit that the food they ate was not healthy enough (67.6%) and that most days they should probably be eating healthier (50.4%).

**Willingness to Pay for Organic Foods**

Consumer psychographics for habitual shoppers of organic products indicate strong alignment between food and spiritual needs, as well as vegetarianism, veganism, and other deeply-seated food-related lifestyles. In studies exploring organic food from the perspective of planned behavior theories (Ajzen, 1991; Aertsens et al., 2009), the concept of 'willingness to pay' (Millock, 2002; Soler et al., 2002) typically associates in the mind of organic food consumers with concerns about human health, the environment, and food quality.

However, the concept of 'health' builds on various combinations of self-centered attitudes, as well as meaning-making within the discourse centered on 'organic and natural' foods, direct and indirect effects of food production and food ingredients on the human body, and assumed differences in nutrition levels between organic and conventional food products (see comprehensive literature meta-analysis by Hughner et al., 2007). Other reasons consumers mention frequently for their purchasing organic food products include superiority in terms of taste than conventional food, protection of environment and animal welfare, food safety, supporting local economy, and embracing a fashionable trend (Aertsens et al., 2009; Hughner et al., 2007; Pearson et al., 2010). Perceptions of superior taste, healthiness and environmental friendliness have been found to heavily influence consumers' interest in purchasing organic food in developing markets (see Thorgersen et al., 2015 for organic food attitudes in China and Brazil; Zhou et al. for Chinese consumers; and Ansari and Talan, 2017, Kumar and Chaurasia, 2016, and Pandey and Khare, 2015 for Indian consumers). Similar conclusions were reached in studies

exploring consumer perceptions in established markets in the European Union and North America (see Aertsens et al., 2009, Diaz Donate et al., 2012, Kesse-Guyot et al., 2013).

Similarly, the concept of 'environmental concerns' is culture-bound to the time and place where people live, and people have always cared about the environment, only the definition of their care has constantly changed (Smith, 2010). Today, consumers' preconceived ideas and selective attention tie in with the complex issues connecting environment, food production sustainability, and food consumption. In a recent study focused on Millennial students, Cavaliere and Ventura (2018) found that consumers in this generation cohort are rather resistant to the new technologies focused on extending shelf life--one of the leading causes of food wastage across the retail sectors. Environmental friendliness, they found, was a characteristic Millennials prefer to claim independently of their knowledge and understanding of new developments in the science and technology of food production. Key words such as 'eco-friendly,' 'recycled,' and 'green,' as well as the recycling symbol on a package, denote that a product is environmentally friendly (Smith, 2010). Millennial women, Smith (2010) found, were more likely than their male counterparts to be influenced by green marketing tactics such as product packaging and advertising--and promote such messages to their friends.

A relatively new focus on what consumers consider 'food quality' can be found in the concept of 'foodies.' The 2017 annual survey conducted by the International Food Information Council Foundation found that 'foodies' tend to be affluent, older, and female. Healthy food, according to them, should be free from artificial ingredients or additives, high in healthy components, and minimally processed. Foodies can also connect desired health benefits with particular foods or nutrients. According to the FHS study, then, Baby Boomers should be the primary target for organic and natural foods, since the organic food sector strongly promotes each of the three features.

**Barriers to Purchase of Organic Foods**

In countries where consumers tend to be satisfied with the quality of the currently available or conventional food, there is less of an impetus to buy organic products in order to satisfy the need to ensure their food has superior taste or is entirely safe (Zander et al., 2015). Similarly, consumers who have access to direct farm-to-table food products tend to be skeptical of the 'organic' labels and premium price (Thorgersen 2009). In Denmark, Finland, Norway, and Sweden, sustainable food consumption strongly correlated with buying local food, healthy eating patterns, interest in cooking, and supporting environmental policy measures (Niva et al, 2010).

In countries beleaguered by scandals and distrust in government bodies, consumers are less inclined to believe that marketers using organic labels provide genuinely superior food products and consequently expressed less interest in purchasing organic foods (Basha et al., 2015, Mueller and Gaus, 2015). For these consumers, the higher price tag for organic food becomes the main reason for rejecting organic foods and opting instead for acceptable alternatives, such as sustainably or humanely produced food--as confirmed in the Pew study (2016), where approximately 70% of the respondents said that the higher cost of organic foods, compared to conventionally-grown food, is an important reason in whether or not to buy organic food. Consumers who cannot afford the price tag of branded organic products have the option of

private-label (store brands) organic products, or natural products (humane practices and carefully selected or avoided ingredients).

**Consumer Profiles**

Previous research has generally determined that the organic product consumers tend to be moms (Berlin et al., 2009; de Magistris and Gracia, 2008; Hughner et al., 2007; Pearson et al., 2010, Urban et al., 2012). In research about consumers of organic food products, claims about the superior quality of organic and natural foods have significantly impacted the way consumers think about food products in general. From human health to humane agricultural practices, and from environmental sustainability to food aesthetics, consumers are now expressing their preference and identity by making food purchasing choices along the storyline of organic food. However, most of the research on organic food consumer behavior has so far been limited to small samples, in many different countries, though nowhere near achieving national representativeness (Al-Swidi et al., 2013,Thorgersen et al., 2015, Urban et al., 2012).

Where Germany, the Netherlands, Greece, and Spain seem to prefer the specialty shop method, in countries such as Austria, Finland, and the United Kingdom prefer a more salient method of organic food sales, such as in ordinary supermarkets (Tarkiainen, Sundqvist, 2005). In Northern European countries, vegetarianism is completely dissociated from the concept of sustainable food consumption; instead, consumers prefer to buy local food and support environmental policy measures (Niva, 2014). Furthermore, organic food markets in countries outside the United States and the European Union are both relatively new and differently (or not at all) regulated in terms of organic food labeling. In a study conducted by Thorgersen et al. in 2015, consumer surveys of attitudes regarding organic food were conducted in Guangzhou, China and Porto Alegre, Brazil. Both samples reported a slight overrepresentation of female participants, due to the fact that "women do most of the grocery shopping in these countries" (p. 396). Because of access and knowledge limitations, surveys were conducted in front of high-end supermarkets and farmers' markets--and consequently represented only a small portion of the general population. Other studies surveyed college students (Al-Swidi et al., 2013) at a university in Pakistan, leading to an overrepresentation of male respondents in a geographic area where men are unlikely to participate in grocery shopping.

From a marketing perspective, then, it is imperative to explore consumer demographics, attitudes, and behaviors in a broader context (Bartels & Hoogendam, 2011). Demographic information should include details relative to consumers' age, gender, race or ethnicity, education level, individual and household income, household componence, employment and occupational profile, as well as where they are located within the U.S. A second level of information should summarize data from consumer attitudes about what is important in their life, shopping experience, health and environmental concerns, food and lifestyle, as well as their interaction with various media (internet, traditional media, social media, and social interaction). Finally, shopping behaviors will be explored through their connection with consumption of organic foods.

## STUDY METHODOLOGY

This study uses data previously collected for the Simmons OneView Research NHCS surveys between 10/27/2014-06/03/2015, with a nationally representative sample of 14,369 U.S. adults. Answers are considered representative for the entire U.S. adult population, with estimated (weighted) universe of 234,786,000 US adults (age 18 or older at time of study). Consumer syndicated research aggregates responses in ways marketers can use to inform their brand, category, and market strategies. Filters and item hierarchy help secondary research studies like this to garner insights regarding consumer demographics, attitudes, and behaviors based on crosstab analysis of aggregated data. After selecting the set of variables from the database mainframe, researchers run a crosstab analysis that reports metrics such as vertical percentage, horizontal percentage, sample size, weighted size (in population universe), and index value. Sometimes the population sample size is very small, in which case marketers know to treat analysis with care. For example, research questions focused on Generation Z (born 1997 or later) must acknowledge the limitation of a very small percentage of its target is currently underage, making it ineligible for regular survey research.

Because the NHCS survey was conducted independent of any academic research, the next step would identify the best survey questions to address the research focus. One survey item is asking respondents how they think about the statement 'when shopping for food, I especially look for organic or natural foods' (answer options: strongly agree, agree, neither agree nor disagree, disagree, strongly disagree; or combined any agree or any disagree). The benefit of this question is that it asks respondents about their own attitude or behavior; the drawback is that it combines organic and natural foods, which makes the statement too broad for the focus of this research. Another survey question asked respondents whether their household uses organic foods (yes, no, or don't know). On the one hand, this is very specifically asking about organic foods; on the other hand, it is not asking if the respondents actually purchase organic foods themselves, but there are other questions that address shopping behavior directly.

### Variable Set

At the highest level, gender and whether or not the household uses organic food products served as independent variables. About 4,241 participants indicated their household does use organic foods, of which 1,830 were men and 2,411 were women. The weighted 'Total population' corresponding to this subset consists of 67.064 million adults (31.142 million men and 35.921 million women), representing 28.6% of the US adult population. The set of dependent variables selected aggregated answers for about 440 questions regarding:

- Demographic information: generation cohort, marital status, employment status, spouse employed full-time or part-time, household income, individual income, parent/guardian of children, presence of children by age, number of people in the household, number of adults in the household, number of employed adults in the household, value of residence, US Census county size, marketing region, if household is Hispanic, and race
- Attitudes and beliefs about food, health, and environment. Values included: any agree (agree somewhat, or agree a lot)

- Behavioral information: shopping behavior. Values included: any agree (agree somewhat, or agree a lot)

The NHCS study is a massive set of surveys aggregated by commonly defined variables. Consequently, while the frequency distribution of responses for each item is important and reported as such, a marketer is more likely to be interested in its relevance when compared to the preponderance of the group/answer within the higher-level set, hence the importance of using index values. In database research where individual answers are not accessible, crosstab analysis aggregates answers and various metrics (size of sample/universe, horizontal/horizontal percentage, and index) help interpret findings.

**Variable Metrics: Index**

The metric called 'index' is best explained in context. For the 'Total population' the index value is 100. When breaking down the dataset to specific questions, the index value helps us interpret how an answer compares one subset relative to a larger group, or the entire population: under-represented (99 or less), equivalent to (100), or over-represented (101 or more). For the subset reflecting part-time employment status among consumers of organic foods, Table 1 indicates that 15.4% of all adults are part-time employed women whose households consume organic foods; within the general population, however, the percentages of all part-time employed *adults*, and part-time employed *women* are substantially lower (11.2% and 12.7%, respectively). The variable indexed at values over 138 (relative to all adults) and 121 (relative to all women), indicating over-representation, or a characteristic that is very likely to be shared among typical female consumers of organic foods.

**TABLE 1**
**Employed Part-time (<30 hours)--Explanation of Index Value**

| | ***General Population*** | | | ***Household Uses Organic Foods*** | | |
|---|---|---|---|---|---|---|
| ***Total*** | ***All*** | ***Male*** | ***Female*** | ***All*** | ***Male*** | ***Female*** |
| Sample (N) | 14,369 | 6,375 | 7,994 | 4,241 | 1,830 | 2,411 |
| Weighted (000) | 234,786 | 113,314 | 121,471 | 67,064 | 31,142 | 35,921 |
| % Total | 100.0% | 48.3% | 51.7% | 28.6% | 13.3% | 15.3% |
| ***Employed PT (<30+ hrs/wk)*** | ***All*** | ***Male*** | ***Female*** | ***All*** | ***Male*** | ***Female*** |
| Sample (N) | 1,814 | 635 | 1,179 | 576 | 186 | 390 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Weighted (000) | 26,217 | 10,762 | 15,454 | 8,536 | 3,016 | 5,520 |
| % of Total Weighted (000) | 11.2% | 9.5% | 12.7% | 12.7% | 9.7% | 15.4% |
| % of Employed PT | 100.0% | 41.1% | 58.9% | 32.6% | 11.5% | 21.1% |
| % Total Weighted (000) who are Employed PT | 11.2% | 4.6% | 6.6% | 3.6% | 1.3% | 2.4% |
| Index | 100 | 85 | 114 | 114 | 87 | 138 |

Interpretation of index values for part-time employment status must consider broader considerations such as the difference between household and family; single-gender, two-adults households; and alternate career options in the top-20 cities in the United States (freelance, consulting, etc.). The Findings section of this study presents detailed interpretation when data substantiates such observations in differences between demographic categories.

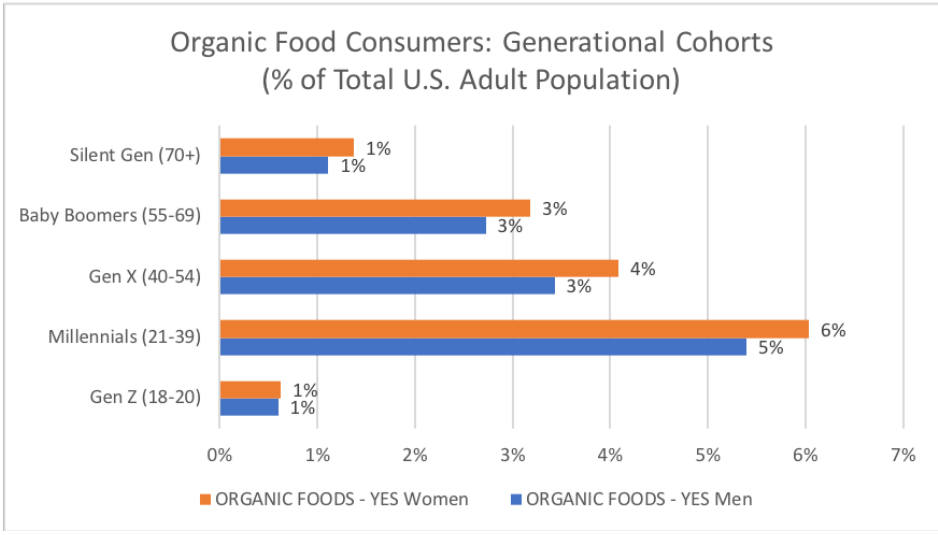
**FINDINGS**

The large sample selected from the original survey made it possible for this study to identify various characteristics that position consumers of organic foods along the following coordinates: demographics, attitudes and beliefs about the environment, health, and food in general; and shopping attitudes and behavior. Furthermore, the relevant findings often allow for differentiation between men and women, making these observations particularly useful for marketing practitioners focused on the food retail sector.

**Demographics**

In the Simmons Research, 2015 Spring Study (NHCS), about 29% of respondents, or an estimated 67 million adults, confirmed their households consume organic products (See Figure 1 below). In terms of generational cohorts for consumers of organic foods, Millennials account for 11% of the total population (almost 27 million adults), followed by Generation X (7% or 17.64 million adults), Baby Boomers (6% or 13.9 million adults), Silent Generation (2% or 5.84 million adults), and Generation Z (1% or almost 2.9 million adults). Of the five generational cohorts, Generation Z (born 1997-2010) is the only group expected to grow organically, as they age into the legal adult age bracket. For the other generational groups, growth of representation for consumers of organic foods is only possible through strategic targeting geared toward increasing market penetration.

**FIGURE 1**
**U.S. Adult Consumers, Household Uses Organic Products**




**Demographic Characteristics**

Overall, households who consume organic foods are 40%-100% more likely than the general population to share at least one of the following four demographic characteristics: Asian race, annual household income of $250,000 or more, individual employment income of $100,000 or more, and residence value of $750,000 or more (See Table 2, Demographics). As far as geographic location, they tend to favor metropolitan areas such as Greater Los Angeles area, or New York area. In terms of generational cohorts, Millennials are about 20% more likely to be consumers of organic foods than any other generation, for both men and women.

Compared to the general population, women whose households consume organic foods are much more likely to be Millennial homemakers with their spouse employed full time or part time, or separated/divorced; to identify as Asian, Hispanic, or 'not White or Black'; and have children age five or younger. When compared to the female population overall, all these characteristics remain prominent, with the very important addition of individual annual income at $75,000 or more. For men whose households consume organic foods, the same demographic characteristics (Asian, high income, high property value) show high incidence relative to the general population. They are almost three times as likely as the general population to have individual annual employment income of $150,000 or more; and twice as likely to report annual household income of $500,000 or more, or live in residences valued at $1,000,000 or more, or claim Asian race. At the other end of the spectrum, the least likely characteristics to be encountered for consumers of organic foods include economically disadvantaged populations (low income, living on disability, retirees), or consumers living in rural areas throughout the Midwest and Central U.S.

**TABLE 2**
**Demographic Characteristics Over-Represented for Consumers of Organic Foods**

| Demographic Index: Highest Likelihood | Gen. Pop. Male | Gen. Pop. Women | Org. Foods HH All | Org. Foods HH Men | Org. Foods HH Women |
|---|---|---|---|---|---|
| EMPLOYMENT STATUS: HOMEMAKER | 6 | 187 | 123 | 5 | 224 |
| HOUSEHOLD INCOME: $250,000 OR MORE | 112 | 89 | 159 | 190 | 132 |
| VALUE OF RESIDENCE: $500,000 - $749,999 | 100 | 100 | 135 | 127 | 143 |
| VALUE OF RESIDENCE: $750,000 - $999,999 | 109 | 91 | 185 | 188 | 183 |
| VALUE OF RESIDENCE: $1,000,000 OR MORE | 104 | 96 | 149 | 203 | 103 |
| MARKETING (NIELSEN) REGION: GREATER LOS ANGELES | 101 | 99 | 135 | 122 | 147 |
| INDIVIDUAL EMPLOYMENT INCOME: $75,000 OR MORE | 147 | 56 | 138 | 210 | 76 |
| INDIVIDUAL EMPLOYMENT INCOME: $100,000 OR MORE | 150 | 53 | 163 | 256 | 81 |
| INDIVIDUAL EMPLOYMENT INCOME: $150,000 OR MORE | 156 | 48 | 173 | 282 | 79 |
| INDIVIDUAL EMPLOYMENT INCOME: $250,000 OR MORE | 161 | 43 | 128 | 204 | 61 |
| HOUSEHOLD INCOME: $150,000 OR MORE | 110 | 91 | 144 | 167 | 124 |

| | | | | | |
|---|---|---|---|---|---|
| HOUSEHOLD INCOME: $500,000 OR MORE | 114 | 87 | 186 | 211 | 164 |
| RACE: ASIAN | 96 | 103 | 193 | 191 | 195 |
| RACE: SOME OTHER RACE | 108 | 92 | 117 | 101 | 131 |
| RACE: NOT WHITE OR BLACK | 104 | 96 | 146 | 135 | 156 |
| Baby Boomers (55-69) | 98 | 102 | 89 | 89 | 90 |
| Gen X (40-54) | 104 | 96 | 101 | 99 | 103 |
| Gen Z (18-20) | 102 | 98 | 93 | 98 | 89 |
| Millennials (21-39) | 102 | 99 | 120 | 122 | 118 |
| Silent Gen (70+) | 90 | 109 | 68 | 65 | 70 |

**Defining Environmental Concerns**

While the concept of 'environmental concerns' shows up frequently in research regarding consumer perceptions about organic vs. regular foods, previous studies rarely provided working definitions for environmental concerns. In the survey used for this study, there are several items that provide actionable items for retailers. For example, women and men who consume organic foods tend to be much more likely than the general population to use methods of transportation that are friendlier to the environment (see Table 3, Environmental concerns). In addition, women consumers of organic foods are very likely to purchase products from companies that are environmentally friendly, and to believe that people have a duty to recycle. They also strongly believe that eco-friendly products are higher quality.

**TABLE 3**
**Attitudes About the Environment**

| Consumer attitudes | Gen. Pop. Male | Gen. Pop. Women | Org. Foods HH All | Org. Foods HH Men | Org. Foods HH Women |
|---|---|---|---|---|---|
| Eco-friendly products are higher quality products | 92 | 108 | 129 | 114 | 142 |
| I often choose methods of transportation that are friendlier to the environment | 98 | 102 | 129 | 127 | 130 |
| I actively tell companies to stop sending me catalogs via the mail to protect the environment | 92 | 107 | 117 | 108 | 125 |
| I am more likely to purchase a product or service from a company that is environmentally friendly | 92 | 107 | 117 | 107 | 125 |
| People have a duty to recycle | 95 | 105 | 111 | 100 | 120 |

**Food and Health**

Consumers of organic foods easily meet the criteria defined for foodies (see IFIC study, 2017): both men and women try to eat gourmet food whenever possible and they are more likely to be vegetarian than the general population (see Table 4, Food and Health). They prefer food that is presented as an art form and does not include artificial additives. In addition, women are quick to try new nutritional products or health foods, prefer to snack on healthy foods, and believe that nutritional value is the most important factor in what foods they eat. They like to know as much as possible about ingredients in the food products they buy, and dispense advice about health and nutrition to their friends.

**TABLE 4**
**Attitudes About Food and Health**

| Consumer attitudes | Gen. Pop. Male | Gen. Pop. Women | Org. Foods HH All | Org. Foods HH Men | Org. Foods HH Women |
|---|---|---|---|---|---|
| I'm usually the first to try a new health food | 86 | 113 | 133 | 113 | 149 |
| I am a vegetarian | 94 | 105 | 141 | 133 | 147 |
| I like to know as much as possible about ingredients before I buy food products | 88 | 112 | 132 | 115 | 146 |
| My friends often ask my advice about health and nutrition | 89 | 110 | 129 | 111 | 144 |
| I prefer food that is presented as an art form | 93 | 107 | 137 | 123 | 149 |
| Usually I am quick to try a new nutritional product | 79 | 119 | 120 | 87 | 149 |
| I prefer to eat foods without artificial additives | 89 | 110 | 132 | 122 | 140 |
| Nutritional value is the most important factor in what foods I eat | 83 | 116 | 127 | 113 | 140 |
| I make an extra effort to buy locally grown food when grocery shopping | 86 | 113 | 124 | 110 | 135 |
| I usually look for the freshest ingredients when I cook | 87 | 112 | 121 | 104 | 135 |

| | | | | | |
|---|---|---|---|---|---|
| I try to eat gourmet food whenever I can | 96 | 104 | 127 | 121 | 131 |

**Shopping Attitudes and Behavior**

Overall, shopping behaviors for consumers of organic foods index the highest on items related to environmental concerns and connections with the immediate community (See Table 5, Shopping Attitudes and Behavior). Men and women who consume organic foods state they would be prepared to pay more for environmentally-friendly products, and they also like to buy products used by celebrities. Several behaviors separate women from men, among organic food shoppers: women are much more likely to try to keep abreast of changes in styles and fashions; to read the information on product labels; buy products that are recycled, or use recycled paper in their packaging; and support the idea that all products that pollute the environment should be banned. Furthermore, women are also more likely than men to sometimes buy an item on the spur of the moment, to enjoy shopping with their children, as well as to allow children to have an impact on the brands they choose.

Regarding their connection with the immediate community, women prefer to buy things their friends or neighbors would approve of, and buy products from companies which sell their products directly to consumers through distributors or representatives who work from their home. They are also more likely to buy products from companies that donate to charities, and make an extra effort to buy locally grown food and the freshest ingredients.

From a retail marketing perspective the most important observations the shopping attitudes of women who consume organic foods relate to their tendency to spend long periods of time in a store browsing. They like to shop often, they are willing to go out of their way to find new stores, and they enjoy shopping even when they do not purchase something--they really enjoy any kind of shopping, particularly when they do so with their friends. Furthermore, women usually head right for the clearance rack when they enter a store, are willing to travel up to an hour or more to shop at their favorite stores, and spend a lot of money on toiletries and cosmetics for personal use.

Men who consume organic foods, on the other hand, are more likely than women to say that other people come to them for advice before buying new things. They are also are less likely to buy unknown brands merely to save money, or to shop around to take advantage of special offers or bargains, or to change brands for the sake of variety and novelty. One of the interesting observations regarding their attitudes about shopping is the fact that men who consume organic products say they rarely go shopping; when they do, they just get what they need and leave; and they especially enjoy shopping with someone of the opposite sex.

**TABLE 5**
**Shopping Attitudes and Behavior**

| Consumer Attitudes | Gen. Pop. Male | Gen. Pop. Women | Org. Foods HH All | Org. Foods HH Men | Org. Foods HH Women |
|---|---|---|---|---|---|
| When I shop for health and beauty care products, I look for organic/ natural items | 71 | 127 | 179 | 127 | 223 |
| When shopping for household cleaning products, I especially look for organic or natural products. | 79 | 120 | 172 | 137 | 202 |
| I prefer food that is presented as an art form | 93 | 107 | 137 | 123 | 149 |
| I'm usually the first to try a new health food | 86 | 113 | 133 | 113 | 149 |
| Usually I am quick to try a new nutritional product | 79 | 119 | 120 | 87 | 149 |
| I am a vegetarian | 94 | 105 | 141 | 133 | 147 |
| I normally count the calories of the foods I eat | 74 | 124 | 120 | 88 | 147 |
| I tend to spend long periods of time in a store browsing | 72 | 126 | 117 | 84 | 147 |
| I like to know as much as possible about ingredients before I buy food products | 88 | 112 | 132 | 115 | 146 |

| | | | | | |
|---|---|---|---|---|---|
| I usually only snack on healthy foods | 83 | 116 | 130 | 112 | 145 |
| My friends often ask my advice about health and nutrition | 89 | 110 | 129 | 111 | 144 |
| Eco-friendly products are higher quality products | 92 | 108 | 129 | 114 | 142 |
| I often go out of my way to find new stores to shop at | 91 | 108 | 125 | 105 | 142 |
| I go shopping frequently | 69 | 129 | 108 | 69 | 142 |
| I prefer to eat foods without artificial additives | 89 | 110 | 132 | 122 | 140 |
| Nutritional value is the most important factor in what foods i eat | 83 | 116 | 127 | 113 | 140 |
| I prefer shopping at specialty stores because they tend to carry the best brands | 116 | 85 | 126 | 142 | 111 |
| I prefer shopping at specialty stores because they tend to carry more brands | 115 | 86 | 128 | 152 | 107 |
| I prefer shopping at specialty stores because the employees are knowledgeable of the products | 113 | 88 | 120 | 135 | 107 |

**Implications for Marketers**

In terms of opportunities for growth, it seems like organic foods become a consideration for families of married Millennials with young children, living in the top-20 Demographic Marketing Areas, individual income of $50,000 or more, and residence value of $300,000 or more. Higher income and higher residence value consistently lead to progressively stronger

likelihood of consumption of organic foods. When consumers can afford it, marriage in general tends to be strongly associated with consumption of organic foods. Although adults who are single or engaged to be married are not very likely to consumer organic foods, the habit continues even after divorce or separation, for both men and women--as long as the household consists of two or more people. As long as organic products continue to be priced substantially above the price of regularly produced foods, it is unlikely that the category will capture substantial consumer loyalty within the general population.

The fact that adults who consume organic foods are also very interested in organic or natural options for health and beauty care products, as well as for household cleaning products, indicates there is a potential for more brands and more products to enter the market. However, marketers must be careful to cultivate brand awareness and pursue distribution in specialty stores, where employees are knowledgeable of the products they carry. Women in particular are likely to be enticed to shopping a new store, a new brand, or a new product through the novelty of the experience, or some sort of a special offer (sales, coupons, shopping with friends, or appealing to spur of the moment decisions). Men, on the other hand, are unlikely to wait for a sale or to shop around looking for a better price.

Since convenience of location is less important than the perception of a specialty store, retailers of organic foods would likely benefit from designing shopping as an experience to be shared and enjoyed socially, either with friends or with friendly and knowledgeable staff. Men in particular appreciate having more brands to choose from, especially if the brands have a reputation for quality. Furthermore, men and women say they use the internet to help plan their shopping trips, so investing in brand presence and salience within the product category is very important for promoting consumption of organic products.

**Future Research**

One of the unexpected findings of this study points at the fact that, while adults who identify as White do comprise the majority of the consumers of organic foods, they are not overrepresented relative to the general population. Instead, it is other racial groups (Black or African American, Asian, or Hispanic) who, when they can afford to consume organic foods, do so wholeheartedly and in large numbers. Furthermore, the Baby Boomers appear not to be well represented among consumers of organic foods, though as a generation they would be in the best position to support and partake into the organic food industry (more disposable income, more health issues, more power to impact environmental policy and concerns). Future research should add more levels of stratification both in terms of demographics, in order to produce more detailed recommendations for retailers targeting consumers by their generation, race/ethnicity, and geography/county size. In addition, follow-up analysis of the data from this study should interpret information about marketing communication, assessing how consumers of organic foods think about traditional and social media.

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