



# Organic Market Research Study

New Brunswick and Nova Scotia

PREPARED FOR:



Atlantic Canadian Organic Regional Network

September–October, 2017

 **NOVA INSIGHTS**



### Overarching Objective

To gather consumer data to inform the development of organic farms and food businesses in the region, as well as consumer education efforts.

### How do we achieve this?

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- ❖ Understand the attitudes and priorities of consumers when purchasing food and other items, and organic ones specifically.
- ❖ Determine the level of understanding and perception of what it means to be organic, the benefits of consuming organic foods, purchasing locally produced organic items, and what organic products may or may not be available locally.
- ❖ Learning from these lines of questioning can be used to inform educational priorities for ACORN and sector insiders.

## Primary Sample

- Primary grocery shoppers randomly invited to participate from an online research panel
- Balanced by region and age



Nova Scotia n=278



New Brunswick n=222



Female 65%  
Male 35%



Urban 21%  
Suburban 33%  
Rural 46%

## Secondary Sample

Connected to ACORN's or a partner's network—"Organic Engaged"

Nova Scotia n=82  
New Brunswick n=72  
Other N=42

A close-up photograph of a person's hand holding a large, green, ribbed tomato. The hand is positioned in the lower-left foreground. In the background, there is a pile of fresh vegetables, including a purple eggplant, several yellow carrots, and green leafy herbs. The entire image is overlaid with a dark green semi-transparent filter. A bright yellow curved line separates the vegetable image from a solid green area at the bottom. The text 'Executive Summary' is written in white, with the first letter 'E' being larger and underlined.

# Executive Summary

## Shopping Behaviour

- ❖ Just over half of grocery shoppers purchase locally grown or produced foods at least most of the time and one-in-five buy organic this often.

*Those who prioritize quality and health buy local and organic much more frequently than others.*

- ❖ One-in-five overall say they are purchasing more organic foods than a year ago.
- ❖ Only 15% of grocery shoppers say they are shopping at direct farm outlets (e.g. markets, CSAs, farm stands) at least weekly. Five times as many shop at grocery chains.

## Shopping Priorities

- ❖ In shopping for groceries, nutrition tops the priorities, but being easy to find where they usually shop and tasting better than other similar products also rank highly.

## Understanding Organic

- ❖ Organic is believed by nearly two-thirds to be pesticide- and spray-free.

*This is also the case for those who shop organic and say they understand what it means to be organic.*

- ❖ “Local” conveys nutritious somewhat more strongly than “organic.”
- ❖ Slightly more than half understand “organic” is regulated, but nearly as many believe the same for “all natural” and “local.”

- ❖ More than half feel organic foods cost more than they're worth and nearly as many say it is more marketing than reality.
- ❖ “Local” foods are much more likely to be perceived as tasting better than organic.

## Certification

- ❖ A third say they are familiar with the certification requirements for a food product to be labeled as organic.

*This nearly doubles among those who say they buy organic often.*

- ❖ After seeing a description of organic certification standards, half say they would be more likely to purchase organic, and a quarter of those who do not currently shop organic are more likely to do so.

- ❖ Understanding the process requirements of certification (e.g. how livestock is housed, etc) is most appealing to those who say they'd be more likely to buy organic.

- ❖ A vast majority believe it is important for certification to be visible on organic products. However, fewer than half feel it is "very" important.



## Shopping for Organic

- ❖ Those who regularly buy organic spend two-fifths of their grocery budget on these foods.
- ❖ Three-fifths are willing to pay a premium for organic, and among these, they would pay an average of 14% more.
- ❖ The products that most commonly elude organic shoppers are meats, some vegetables, and dairy products.
- ❖ Even among currently organic shoppers, price and value for money top the list of influencers in choosing brands. Knowing the farm or farmer, or having a trusted recommendation are also very influential for organic shoppers.
- ❖ Those who do not buy organic very often are, by far, most likely to say it is because the price is too high.



## Local

- ❖ “Organic” and “Local” are seen as separate concepts.

*Fewer than half feel it is very important for organic to be grown locally.*

*A quarter feel it is important for local foods to be organic.*

*Slightly more than half would think to look in a local farmer direct outlet if shopping for organic.*

- ❖ Those who do not shop in local farmer direct outlets are most likely to say it is because they are more expensive.

*Convenience also plays an important role, and many do not perceive the benefit.*



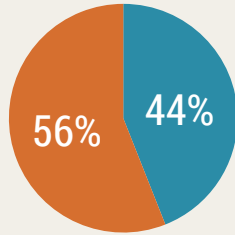
# Classifications

## Classifications

Respondents are grouped in various ways to better understand how behaviours, opinions, and attitudes are affected.

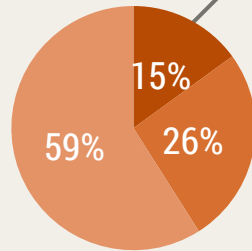
### Province

- New Brunswick
- Nova Scotia



### Shop Local

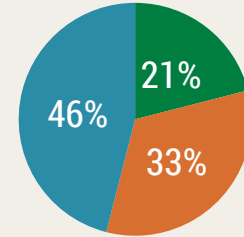
- Weekly
- Less than weekly
- Less than monthly



ORGANIC  
ENGAGED  
52%

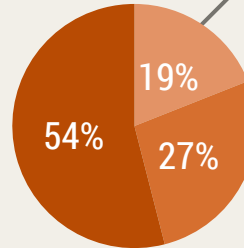
### Community Type

- Urban
- Suburban
- Rural



### Buy Organic

- Always/Most of the time
- Once in a while
- Rarely/Never



ORGANIC  
ENGAGED  
76%

In some questions, we asked them to use a slider to indicate their position in relation to two opposing alternatives.

*The slider captures their rating for each question on a 7-point scale*

### When I grocery shop, I usually...

Don't worry about spending money



Stick to a strict budget

Cut back on quality to save money



Buy the best regardless of price

Buy any products that appeal to me

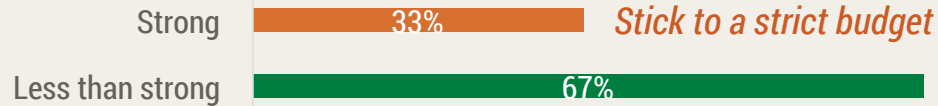


Avoid products that aren't healthy

Defining “strong” as the top two ratings of each scale, we can classify respondents to see how they differ.



### Price Sensitivity



### Health Conscious






### Quality Conscious



## Classifications

Price sensitive shoppers spend less on groceries and quality conscious ones spend more. However, health conscious shoppers spend the same as those who are less likely to avoid unhealthy foods.

## Median Weekly Spending

	Strong	Less than Strong
 Price Sensitivity	\$100	\$120
 Health Conscious	\$120	\$120
 Quality Conscious	\$125	\$100





Not surprisingly, price sensitivity is affected most heavily by household income **under \$30,000**.

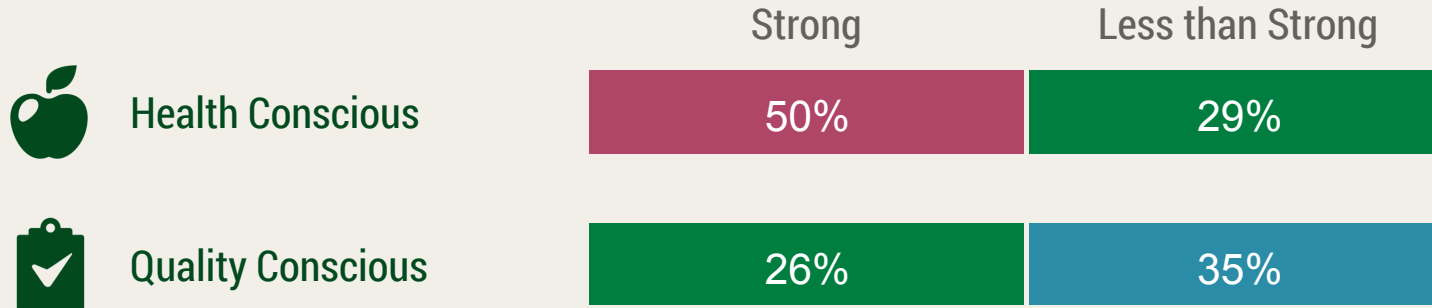
Household Income	Median Weekly Spending	Strong Price Sensitivity
Less than \$30,000	\$100	55%
\$30,000–\$49,999	\$100	34%
\$50,000–\$74,999	\$120	34%
\$75,000+	\$150	24%



Health conscious shoppers are more likely to also be price sensitive. However, those concerned more with quality are less likely to be price sensitive.

### Strongly Price Sensitive

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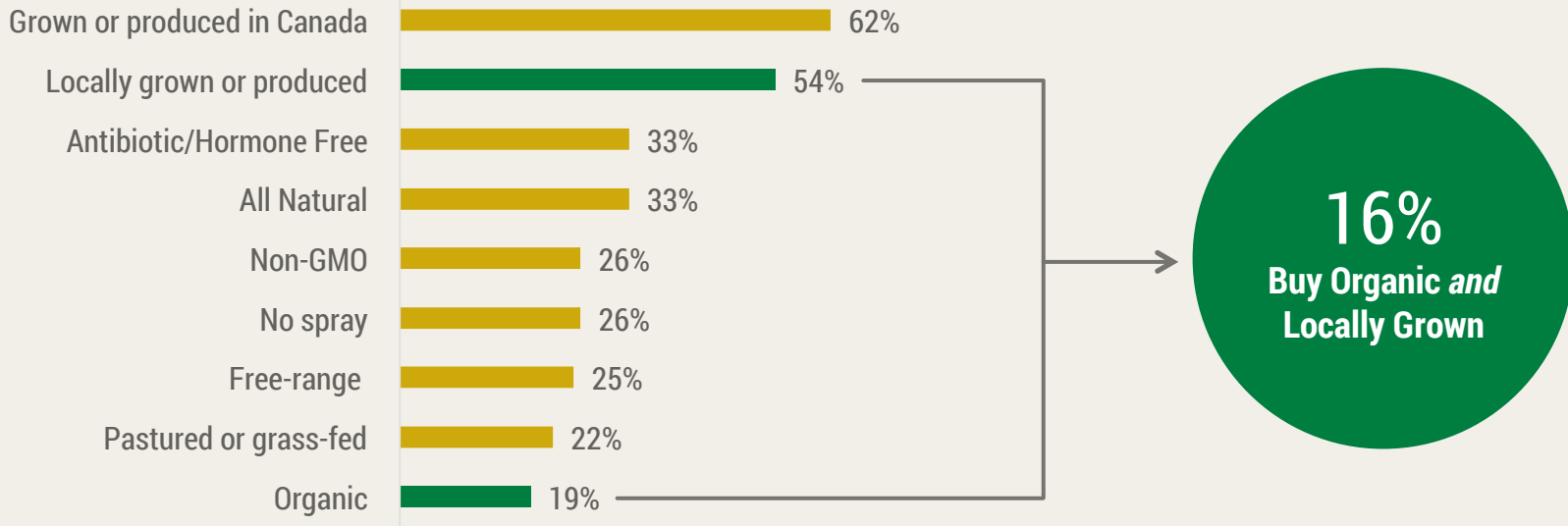


# Shopping Behaviour

A close-up photograph of a person's hands. The left hand, adorned with a colorful patterned scrunchie, holds the top of a brown paper shopping bag. The right hand, wearing a blue and brown braided bracelet, holds a green apple that has been partially eaten, showing its white core. The background is slightly blurred, suggesting an outdoor or market setting. A large, curved graphic overlay in shades of green and yellow dominates the bottom right corner of the image.

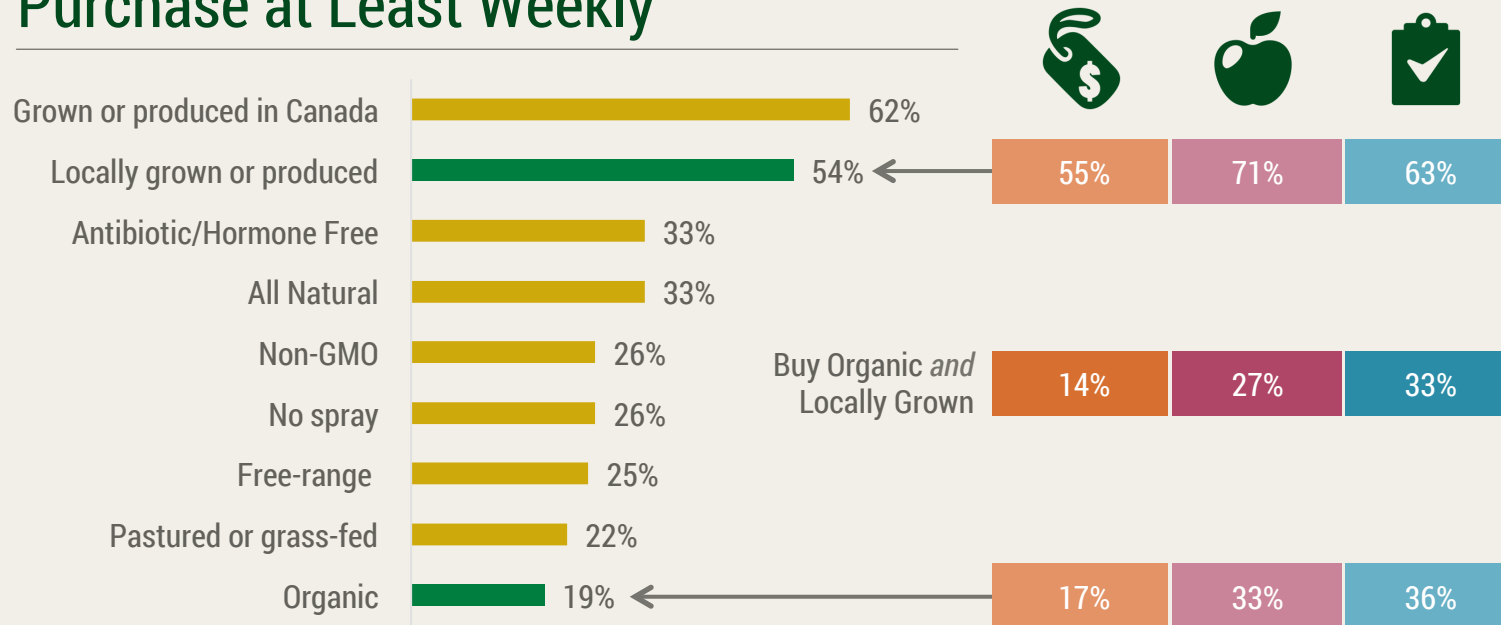
Over half purchase locally grown food at least weekly, and one-in-five purchase organic (however that is defined to them). Only one-in-six say they purchase both.

### Always + Most of the Time



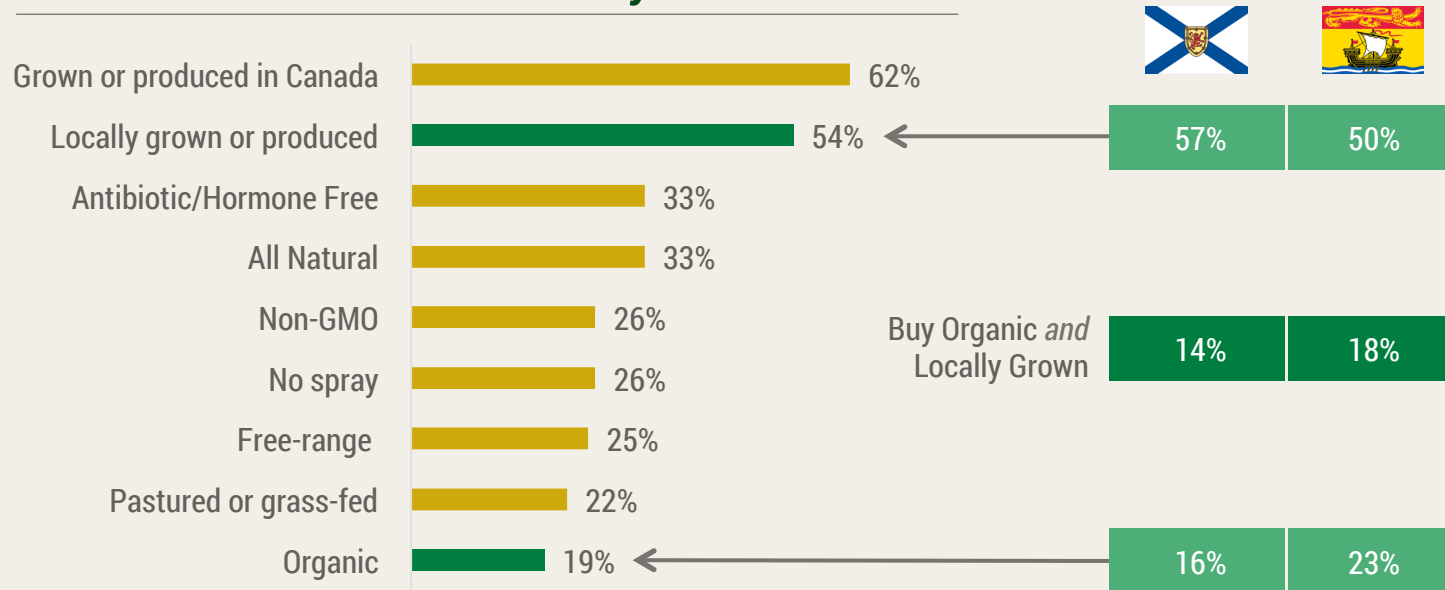
Quality and health conscious shoppers are much more likely to purchase local and organic foods at least weekly.

## Purchase at Least Weekly



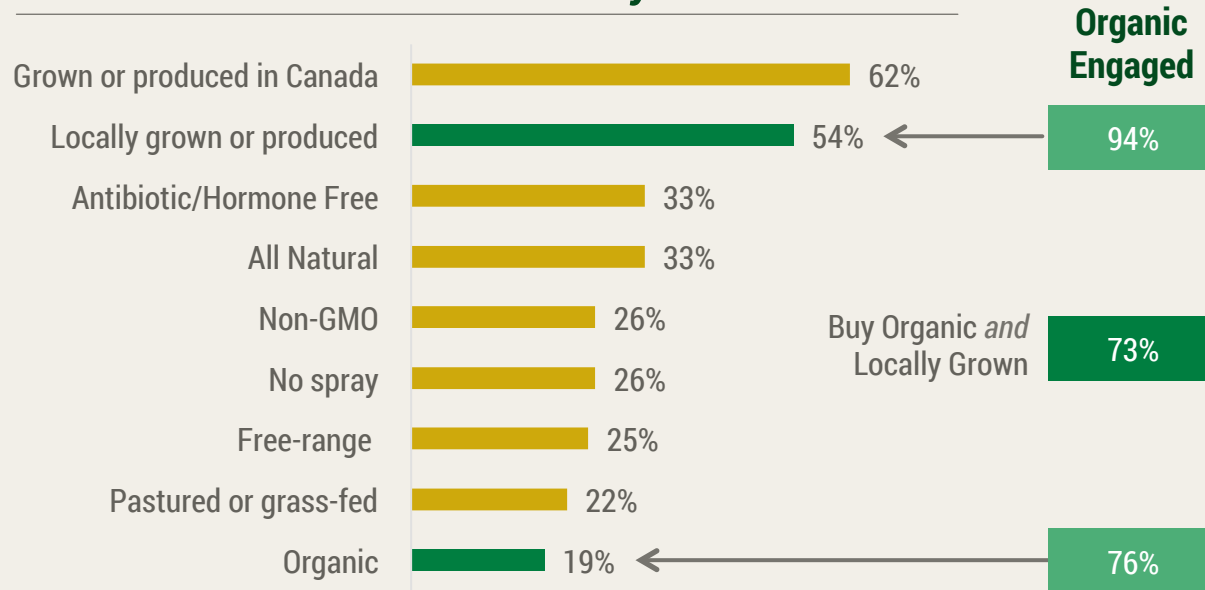
Nova Scotia shoppers are somewhat more likely to purchase locally grown, but New Brunswickers are somewhat more likely to buy organic.

## Purchase at Least Weekly



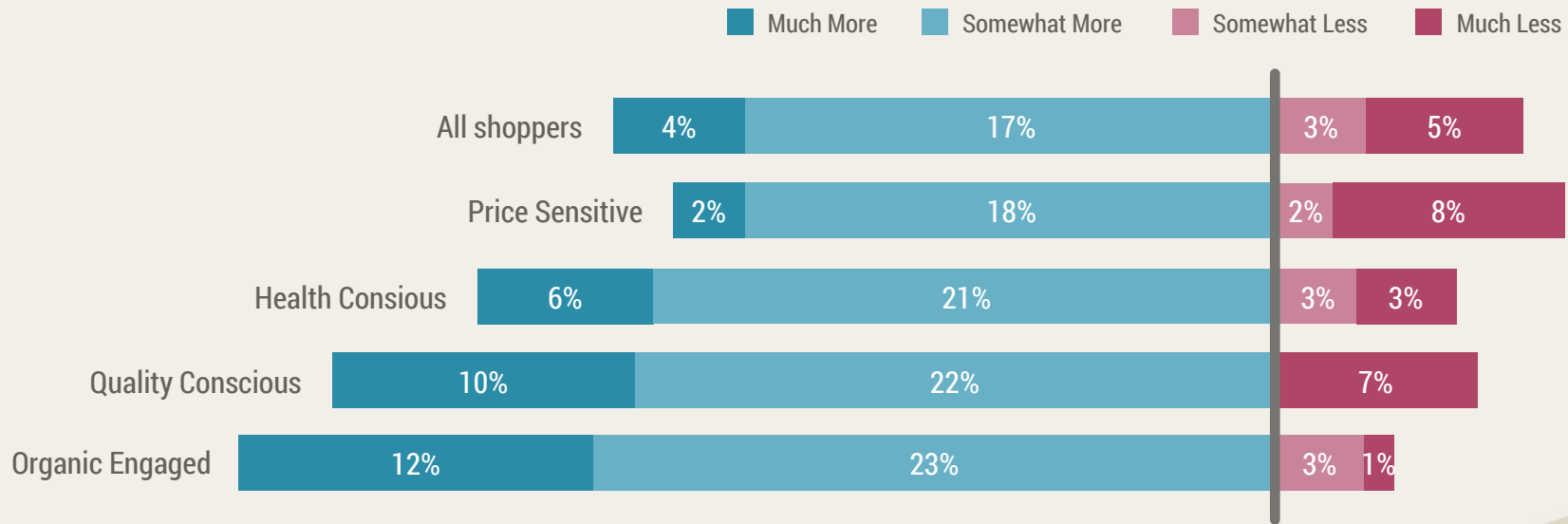
Three-quarters of “Organic Engaged” shoppers purchase local and organic at least weekly.

## Purchase at Least Weekly



Quality and health conscious shoppers are increasing their purchases of organic to a much greater extent than average shoppers or price sensitive ones.

### Purchase of Organic Compared to 12 Months Ago

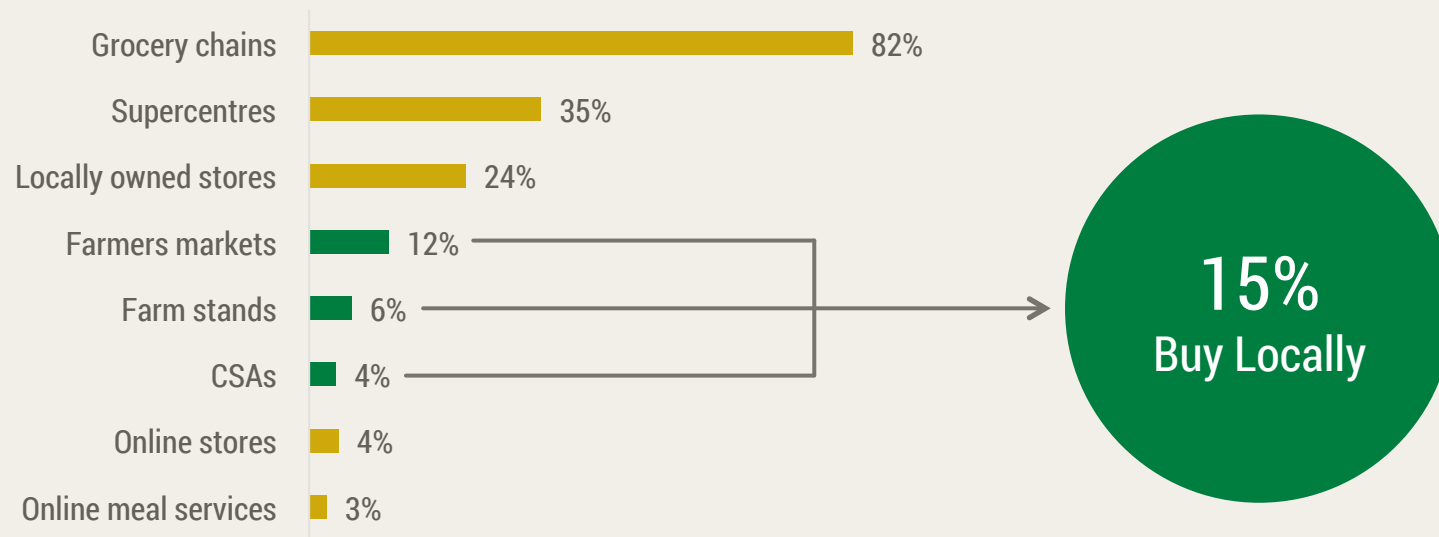


E8: Compared to 12 months ago, are your purchases of organic foods generally?



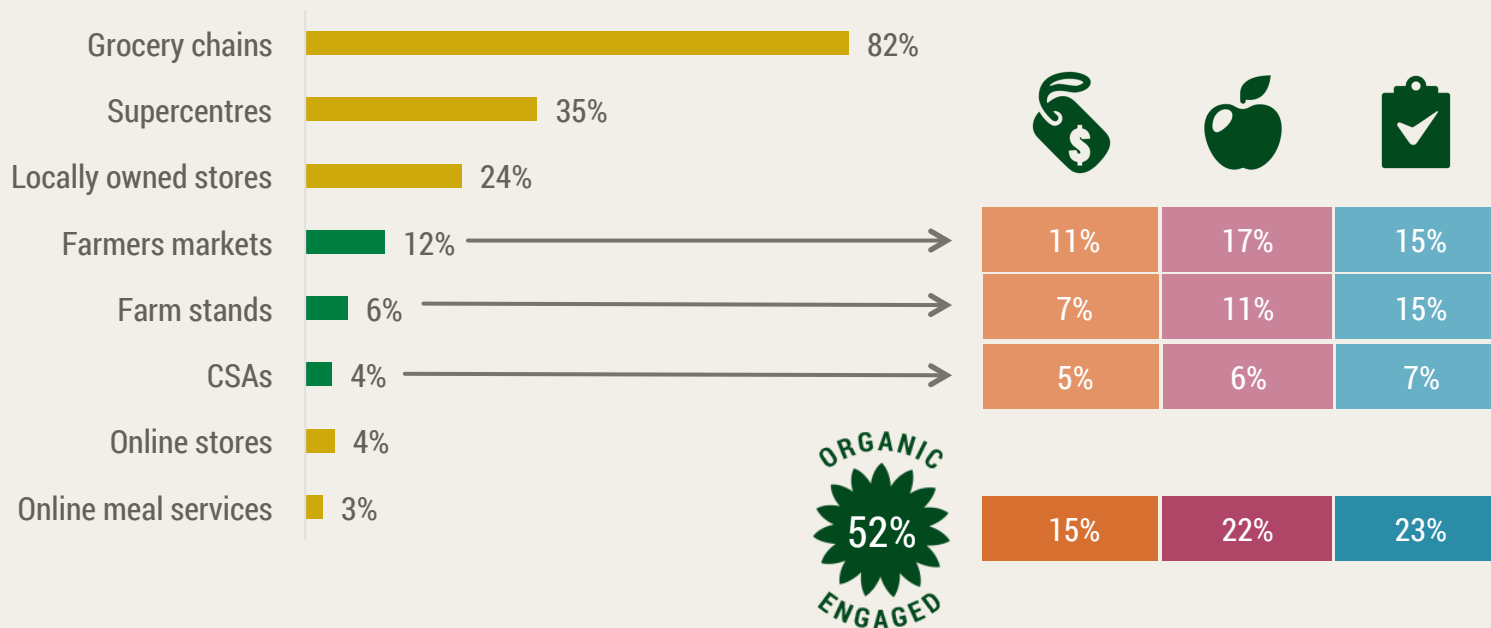
Among all shoppers, 15% shop at least one of the three local farm direct outlets weekly.

### Shop at Least Weekly



Health and quality conscious shoppers are somewhat more likely to shop at local direct outlets. Half of the Organic Engaged shoppers say they shop there at least weekly.

## Shop at Least Weekly



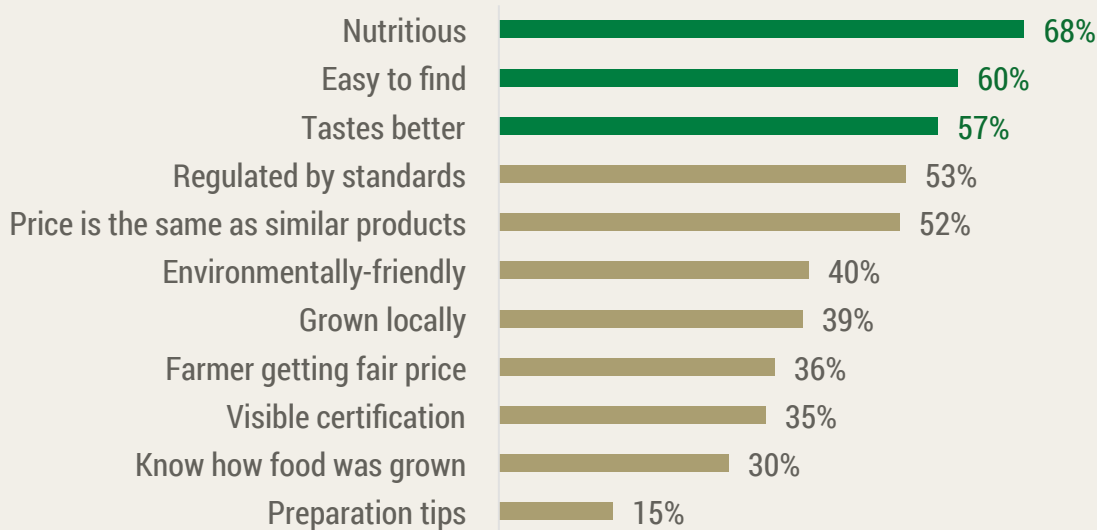
A4: How often do you get groceries from the following ... ?

# Shopping Priorities



Nutrition is chosen as a very important characteristic by the highest proportion of shoppers. Not far behind are ease of finding the item and taste.

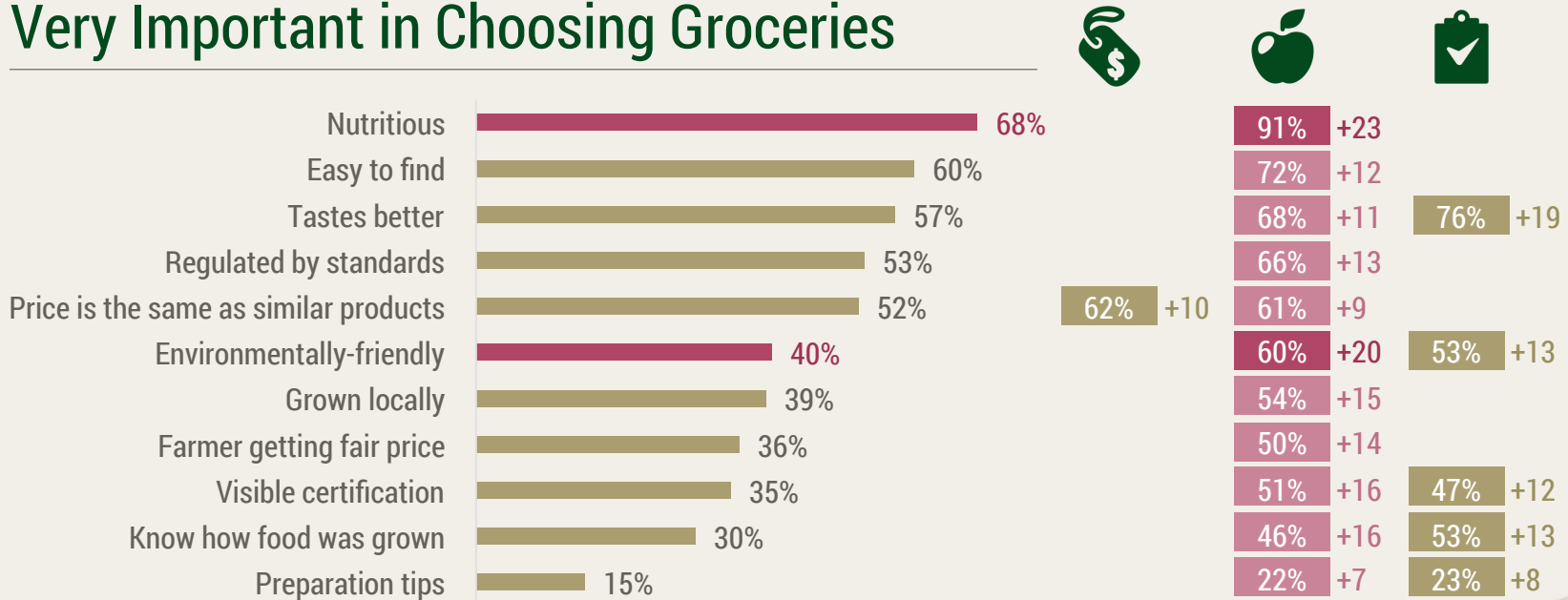
### Very Important in Choosing Groceries



# Shopping Priorities

Health conscious shoppers are more discerning across all characteristics, but particularly on nutrition, and being environmentally friendly.

## Very Important in Choosing Groceries

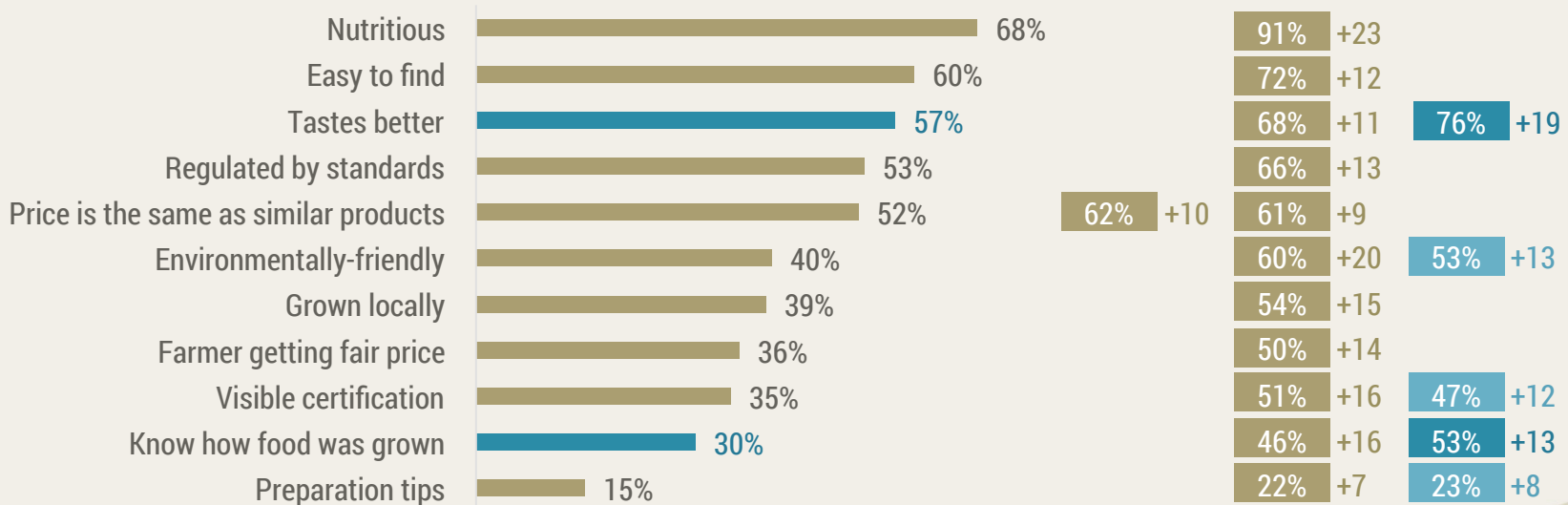


B1: When you purchase groceries, how important are each of the following characteristics in choosing what to buy?

# Shopping Priorities

Quality conscious shoppers place a higher priority than others on knowing where the food was grown and taste.

## Very Important in Choosing Groceries

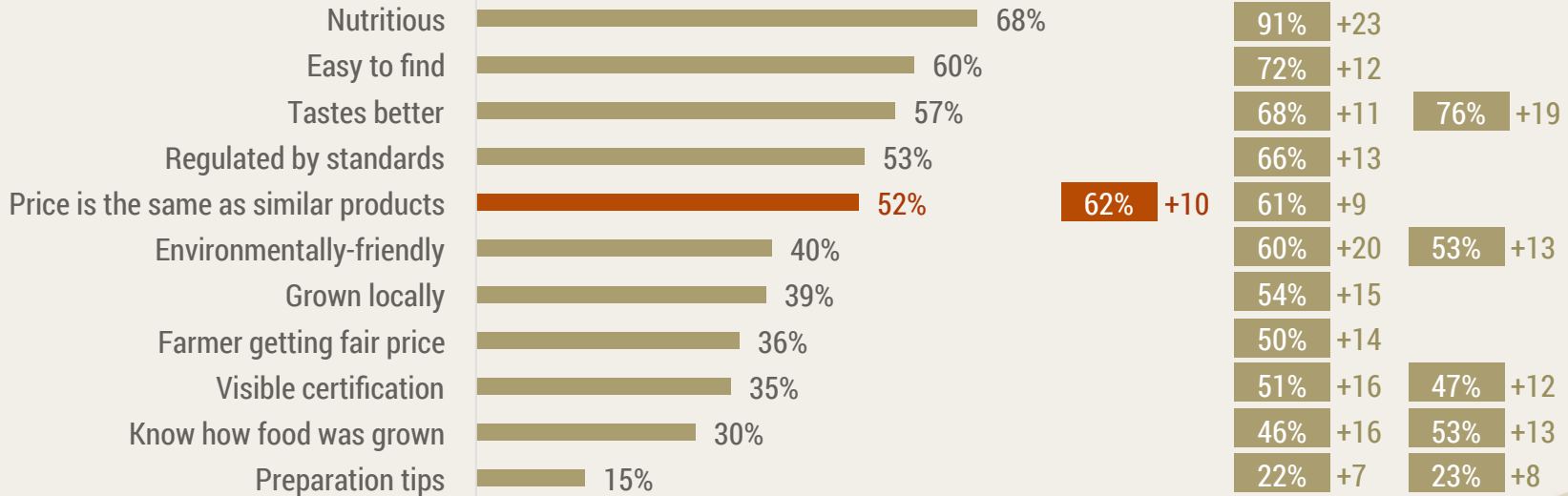


B1: When you purchase groceries, how important are each of the following characteristics in choosing what to buy?

## Shopping Priorities

Not surprisingly, price conscious shoppers over-index on price as a characteristic. All other characteristics are similar to the average shopper.

### Very Important in Choosing Groceries



B1: When you purchase groceries, how important are each of the following characteristics in choosing what to buy?



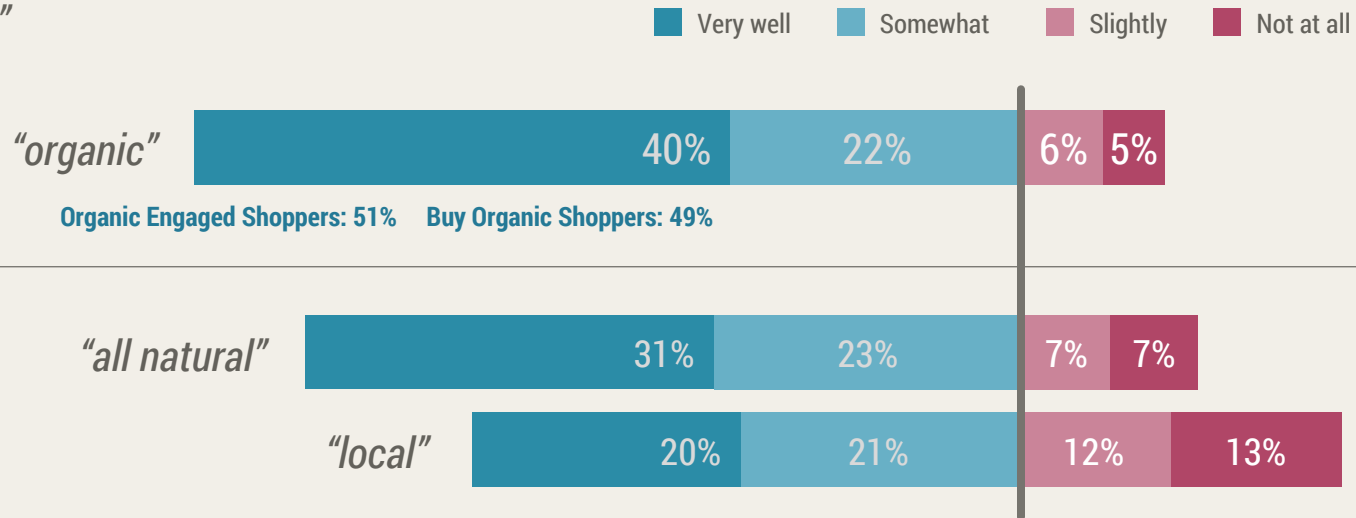
# Understanding Organic

A close-up photograph of a person's hands holding a large, green, ribbed tomato. The background is filled with various fresh organic vegetables, including a purple and white striped eggplant, a bunch of yellow carrots with green tops, and leafy greens. The image is partially covered by a dark green curved overlay on the right side, which contains the title text.

A strong majority believe “*organic*” foods use no pesticides nor sprays. This is a somewhat less prevalent belief for “*all natural*.”

### No Pesticides or Sprays

“Describes...”



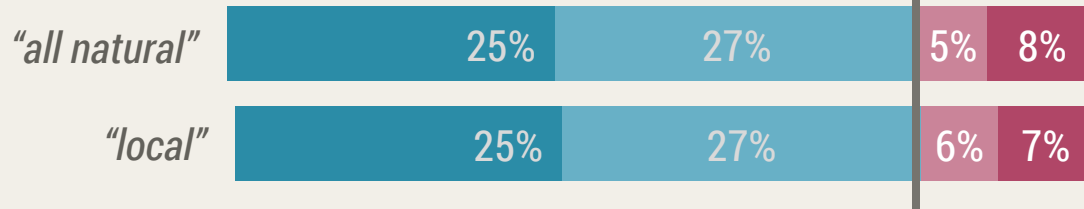
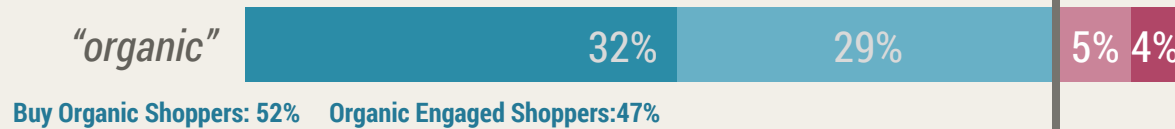
C1: We’re now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

*“Organic”* is also perceived as more environmentally friendly than the *“all natural”* label.

## Environmentally Friendly

*“Describes...”*

Very well   Somewhat   Slightly   Not at all

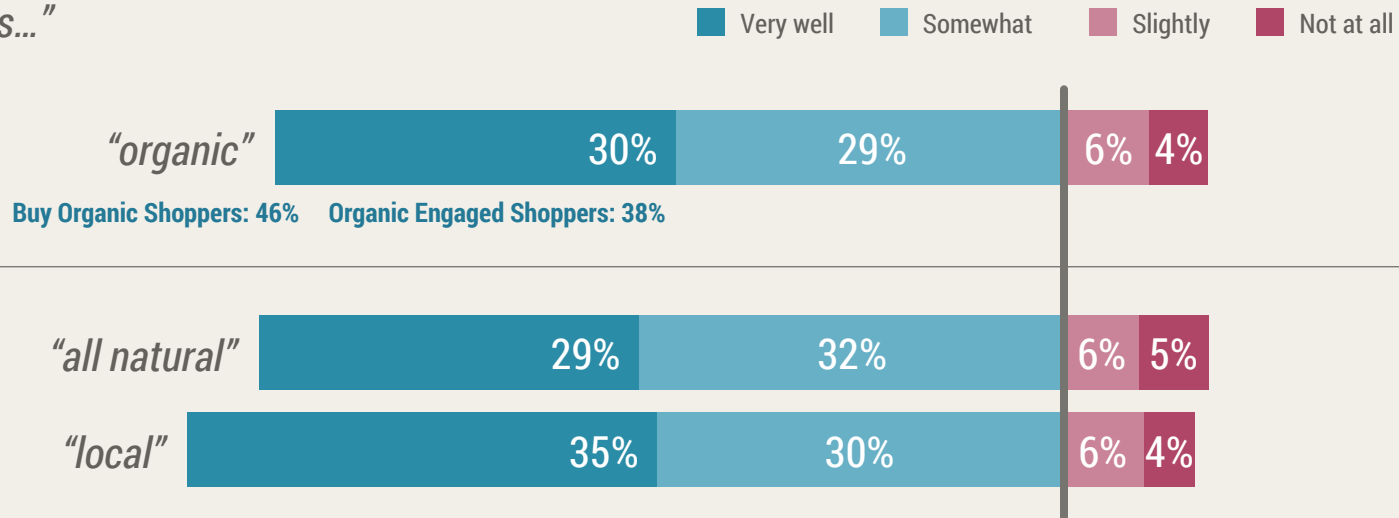


C1: We're now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

There is little perceived difference on nutrition between “*organic*” and “*all natural*,” but “*local*” food is somewhat more likely to be seen as nutritious.

### Nutritious

“Describes...”

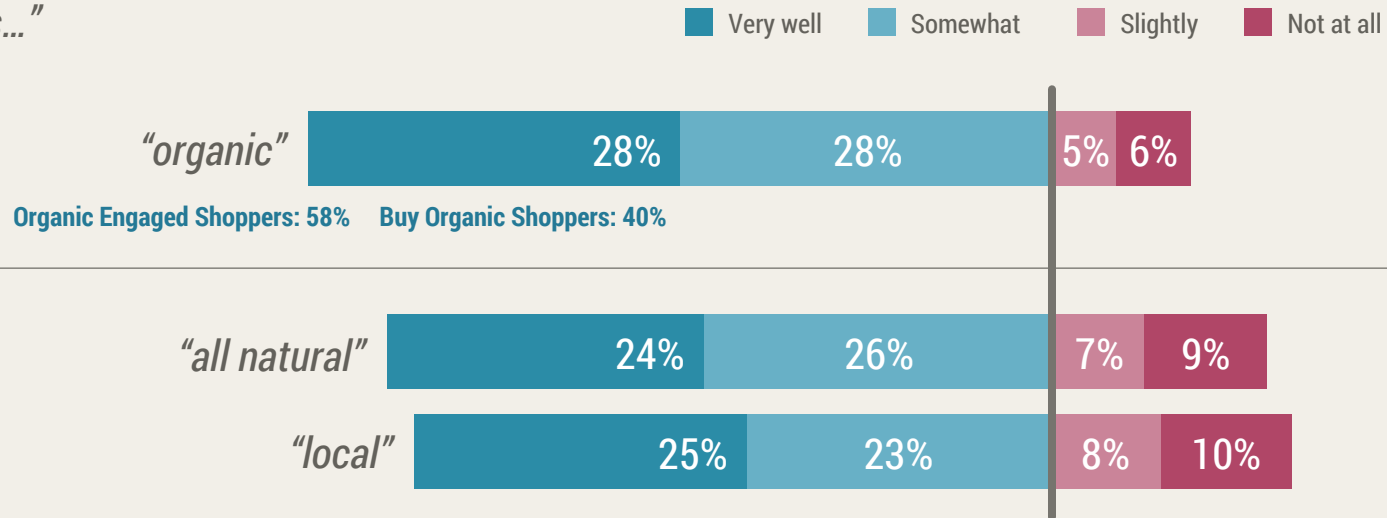


C1: We’re now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

*"Organic"* stands out somewhat as being regulated by standards, but still many are not confident in this nor distinguish from *"all natural"* or *"local."*

### Regulated by Standards

*"Describes..."*

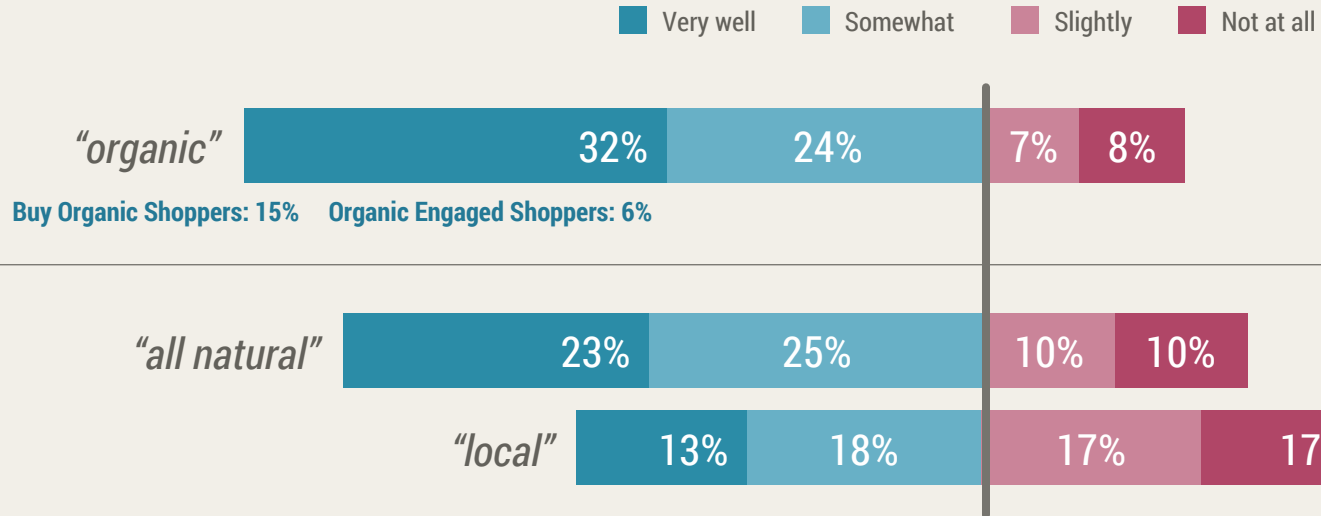


C1: We're now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

*“Organic”* is perceived to cost more than it is worth to a greater extent than the other labels.

### Costs More Than It's Worth

*“Describes...”*

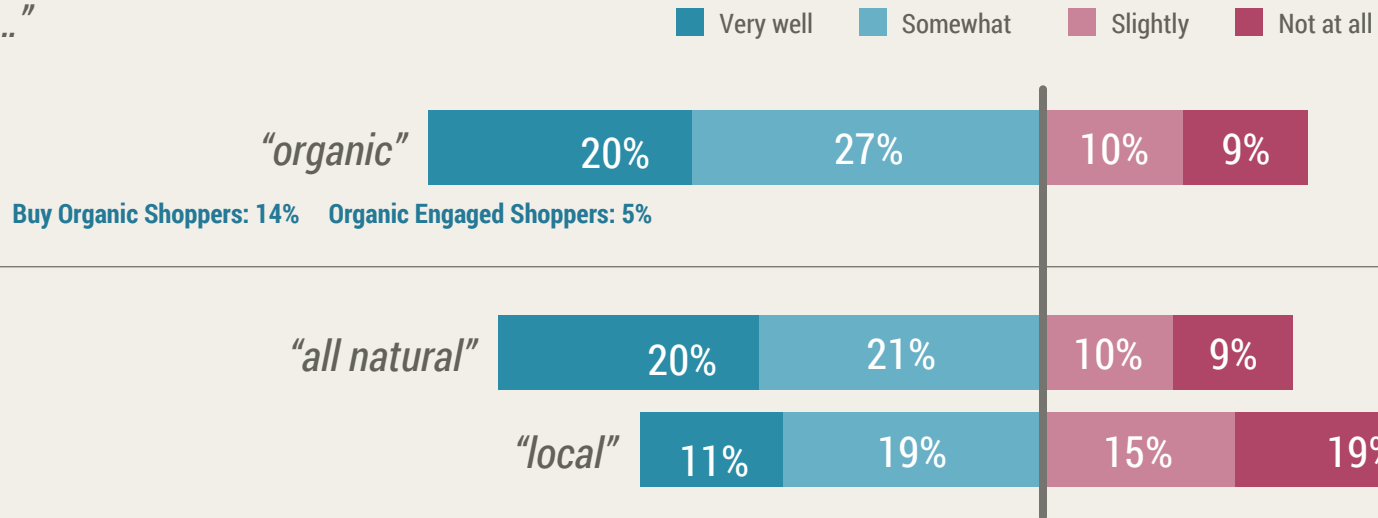


C1: We're now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

Nearly half believe “*organic*” is more marketing than reality, much higher than the “*local*” label.

### More Marketing Than Reality

“Describes...”

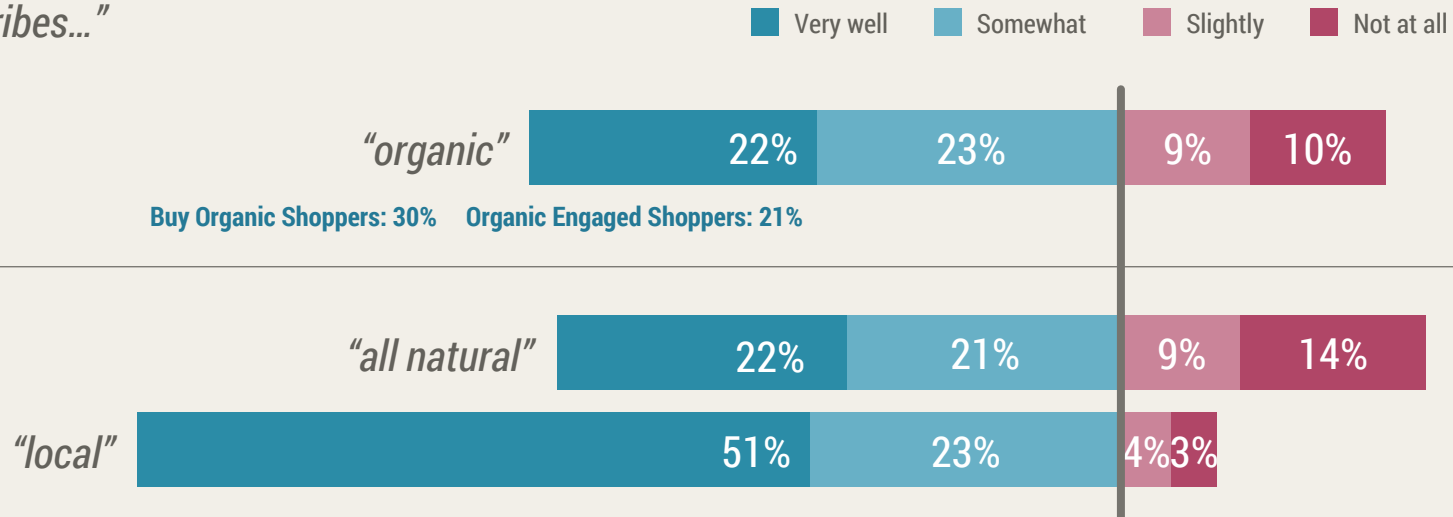


C1: We’re now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

Shoppers understand the job creation benefit of local food shopping.

## Creates Employment in the Maritimes

*"Describes..."*



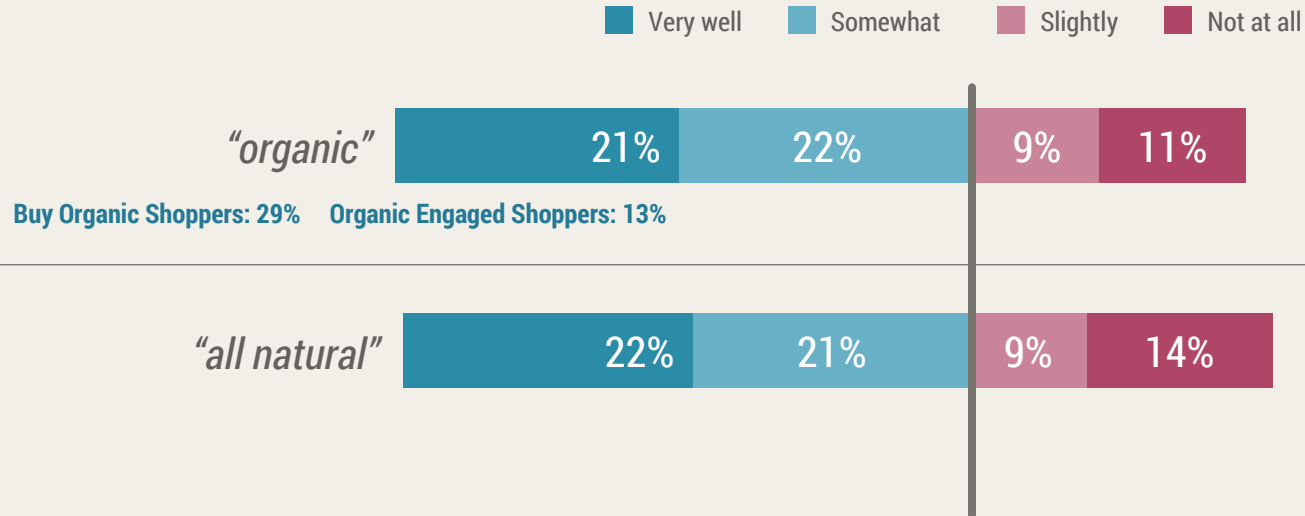
C1: We're now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.



Fewer than half see “*organic*” as being grown locally, and the perception is no more prevalent than for “*all natural*.”

### Grown Locally

“Describes...”

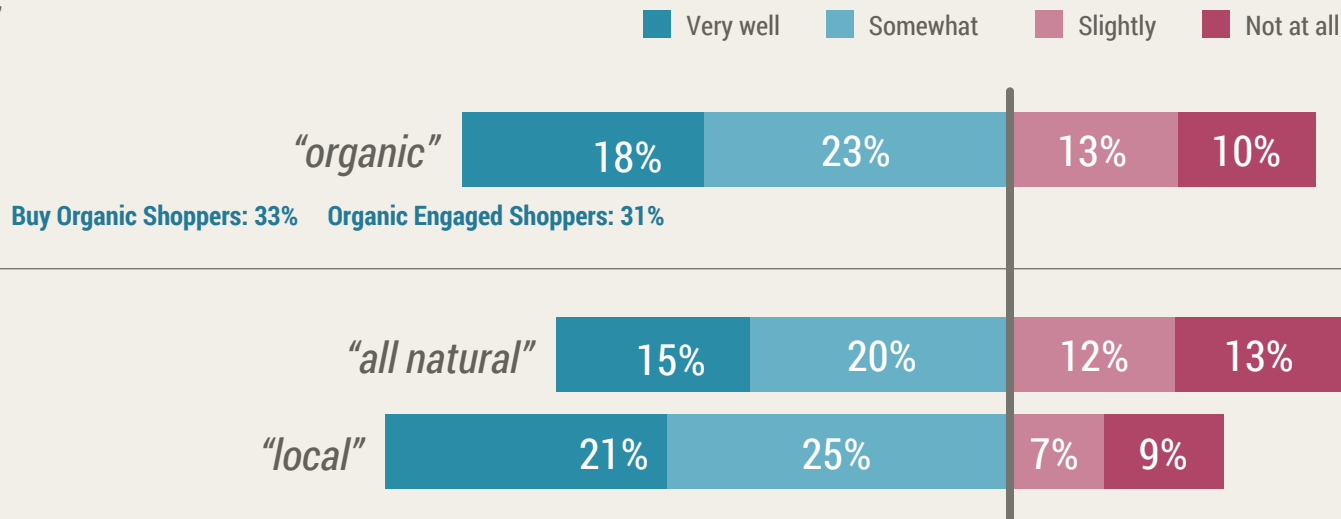


C1: We’re now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

*“Local”* is seen as somewhat more transparent than *“organic.”*

## Transparent About What it Means

*“Describes...”*



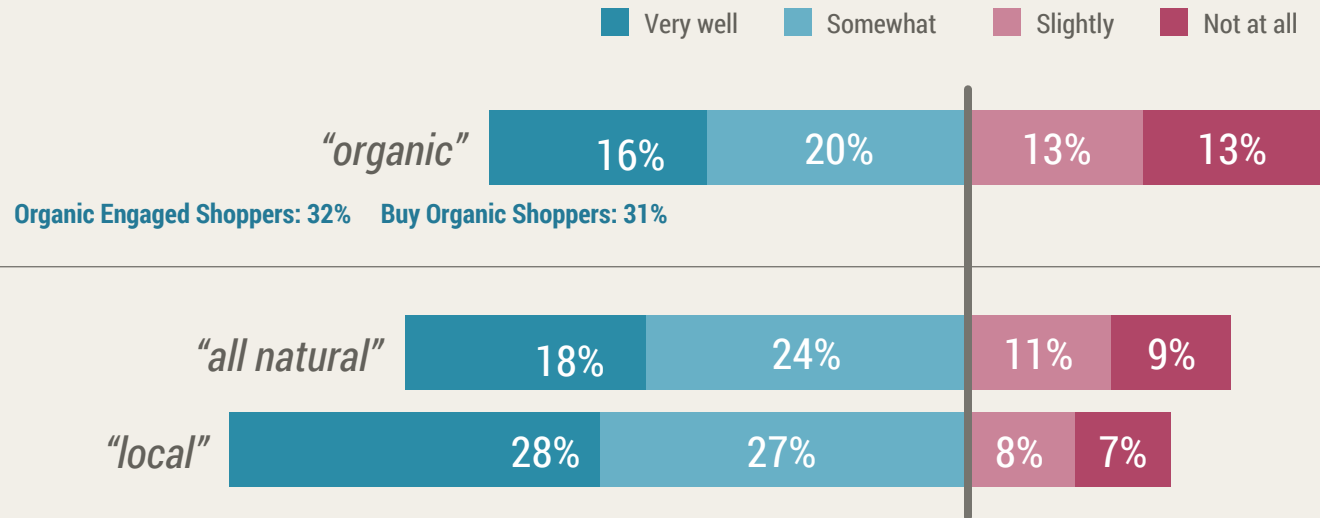
C1: We're now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

## Understanding Organic

Only a third feel “*organic*” will taste better. More believe this for “*all natural*,” and the “*local*” label carries an even better perception of taste.

### Tastes Better

“Describes...”



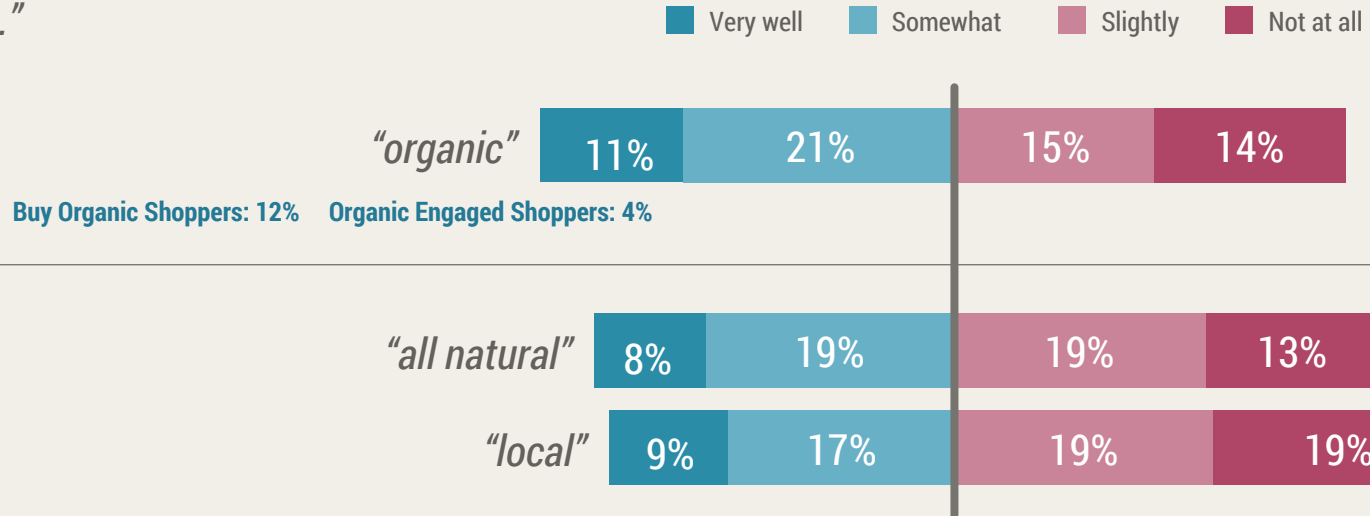
C1: We’re now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

## Understanding Organic

There are not strong feelings, generally, about the convenience in finding or purchasing any of these product labels. However, “*organic*” is seen as the most inconvenient.

### Too Inconvenient to Find and Purchase

*“Describes...”*



C1: We’re now going to show you three terms related to food along with some possible descriptions. For each, please tell us, to the best of your knowledge, the degree to which each describes the terms.

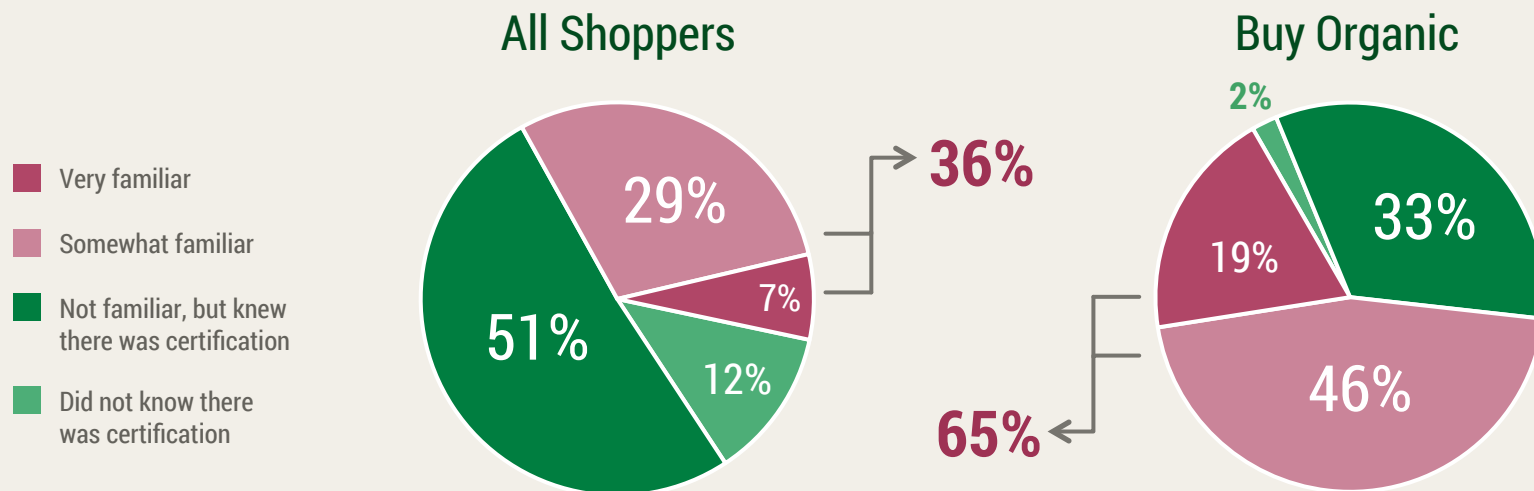
# Certification

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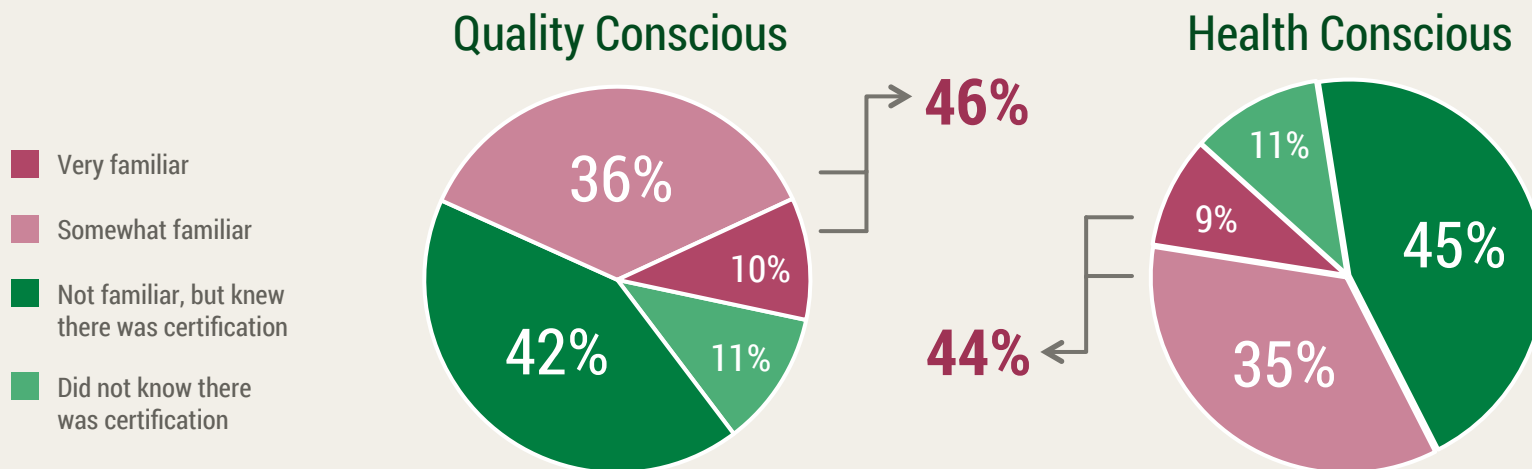
Overall, slightly more than a third believe they are at least somewhat familiar with organic certification. Nearly two-thirds of those who say they buy organic, say they are familiar.

### Familiarity with Organic Certification



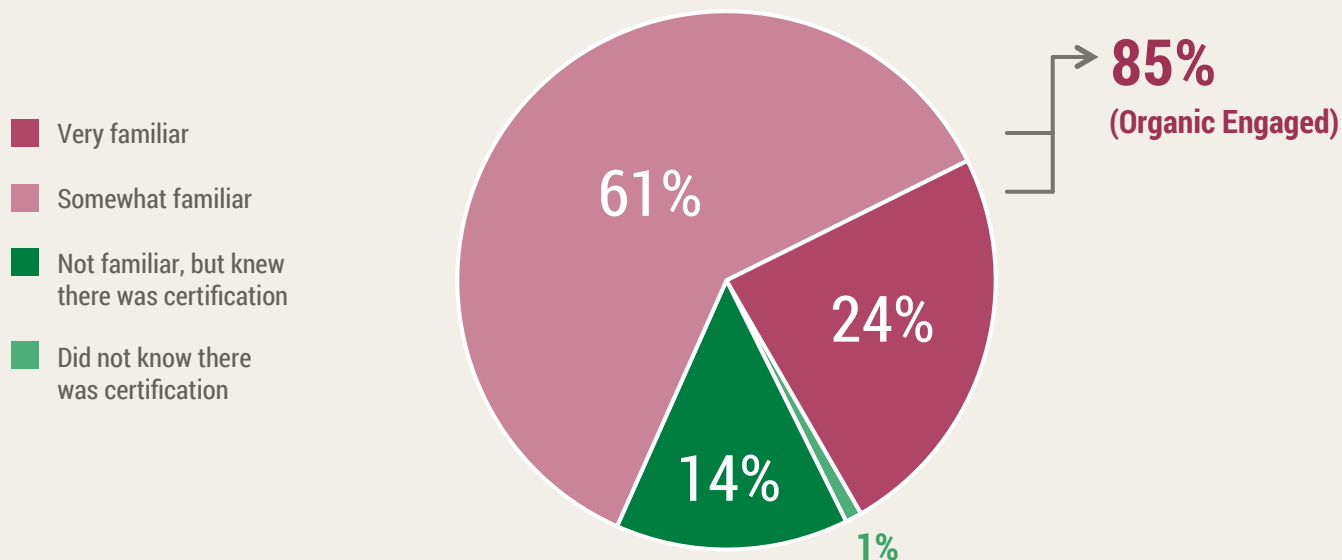
Quality and Health conscious shoppers are somewhat more likely than average to say they are familiar with certification, but not to the extent of those who report buying organic.

### Familiarity with Organic Certification



**Organic Engaged** shoppers are nearly twice as likely to say they are familiar with organic certification.

### Familiarity with Organic Certification





# The following definition of organic was presented to respondents...

Use of the term "organic" (or "organically grown" etc.) in the marketing of any agricultural product (including food for human consumption, livestock feed and seeds) can only be applied to those products that have been certified to the Canada Organic Standards. The Canadian Food Inspection Agency (CFIA) oversees certification bodies who verify through third-party inspection that a product has been produced in accordance to these standards.

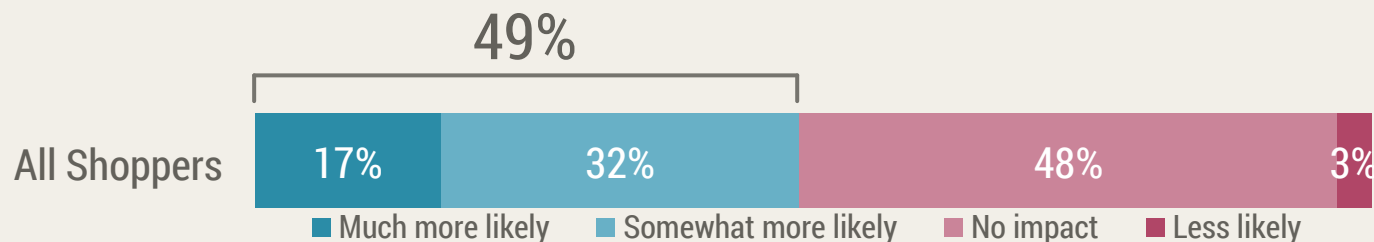
The standards are guided overall by four main principles of health, ecology, fairness, and care, and lay out the specifics of organic production, including:

- How livestock must be housed, fed, transported and slaughtered
- How specific crops and produce are to be grown, extracted, processed and stored
- How pests and diseases are to be treated
- Which substances, methods and ingredients may not be used
- What environmental factors must be taken into consideration

Only products with at least 95 per cent organic content may be labelled as "organic" or bear the "organic" logo. These products must be certified and the name of the certification body must appear on the label.

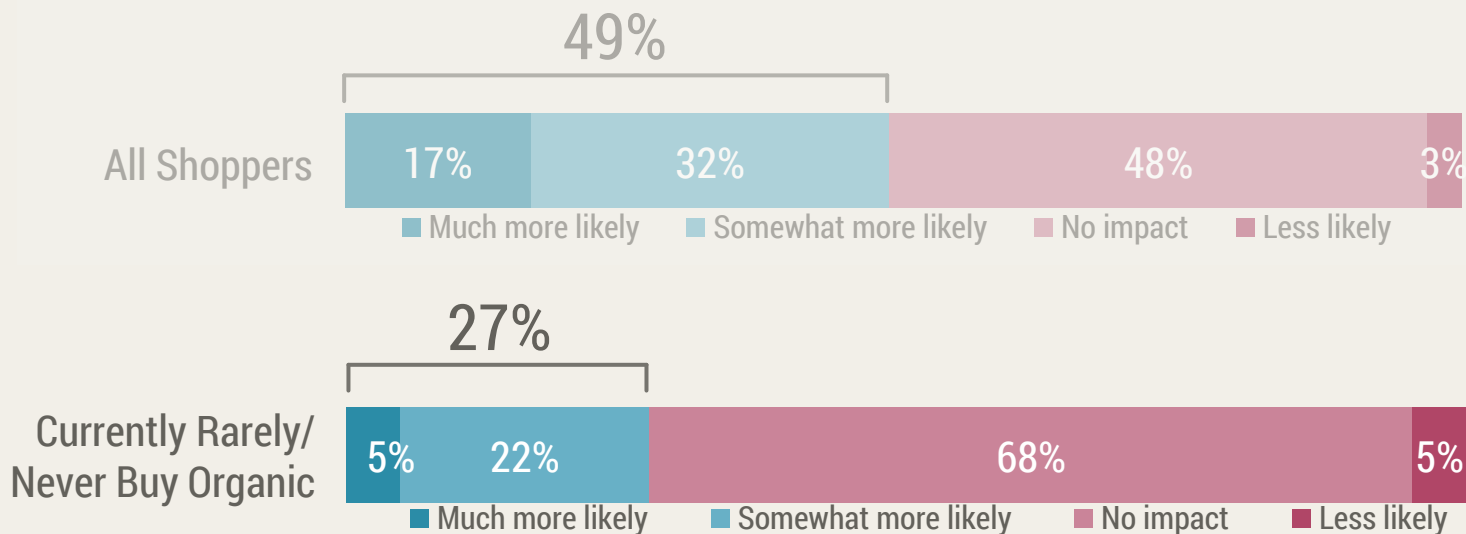
About half would be at least somewhat more likely to buy organic based on the description.

### Post description, Likelihood to Buy Organic



More than a quarter of those who do not already buy organic may be moved to start by the knowledge contained in the description.

### Post description, Likelihood to Buy Organic



Knowledge of the process is of greater influence than certification, but effective certification could make the connection with these processes in the minds of consumers.

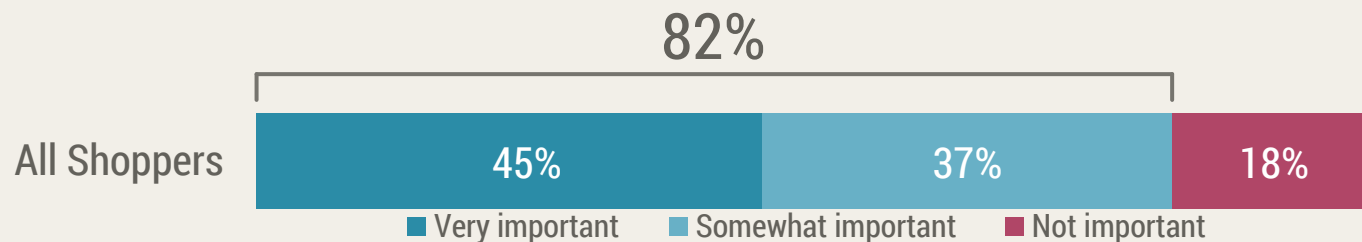
### Aspects of Description that Makes More Likely to Buy

*(among those more likely to buy)*

How livestock must be housed, fed, transported and slaughtered	34%
How pests and diseases are to be treated	21%
Which substances, methods and ingredients may not be used	18%
Certification through third party inspection	7%

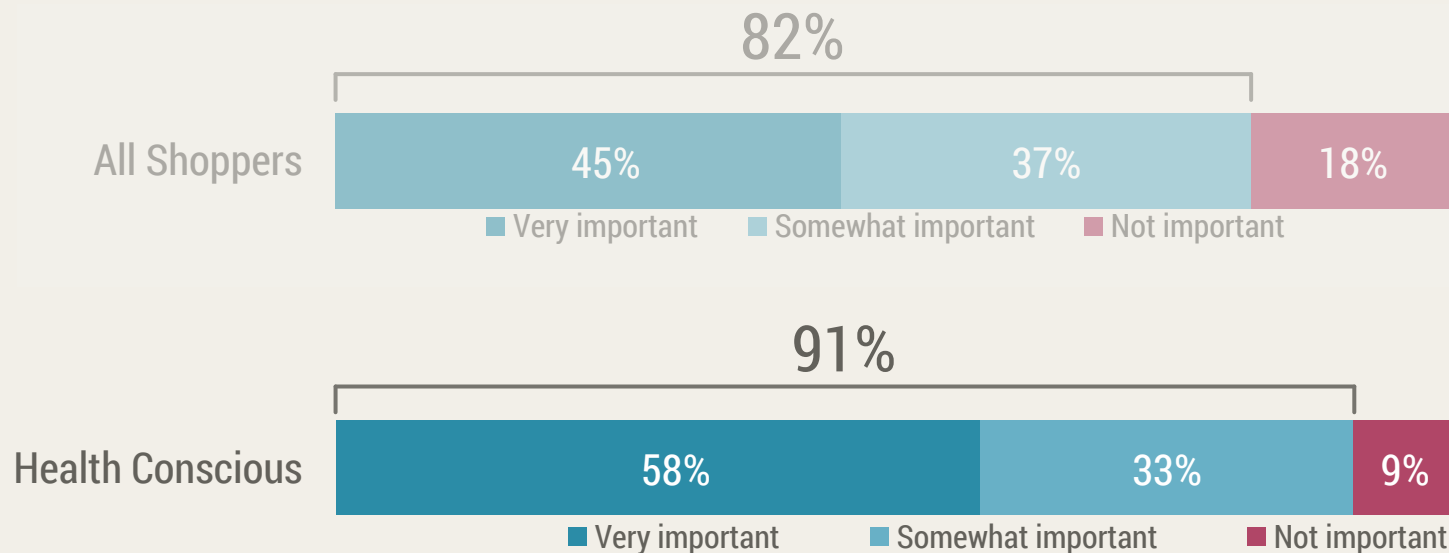
There is a strong preference for having a visible certification on organic products.

### Importance of Visible Certification



Those who are health conscious are even more likely to feel a visible certification on the packaging is important.

### Importance of Visible Certification



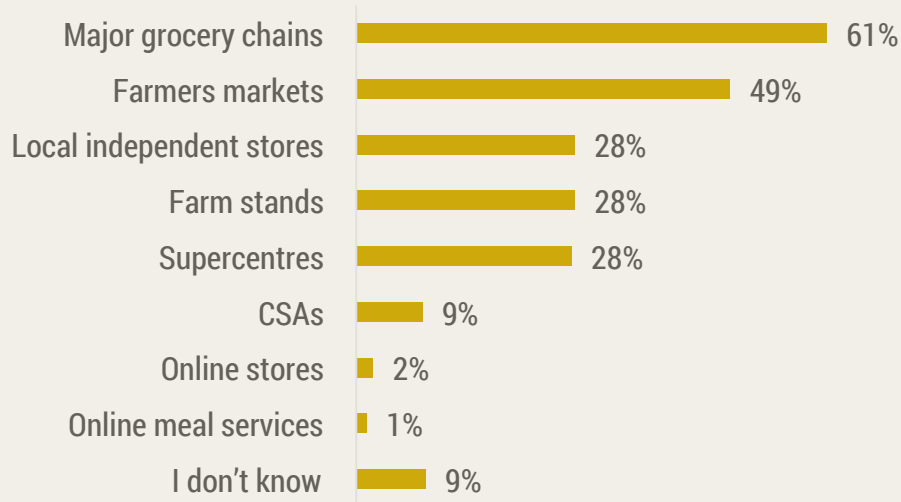
A close-up photograph of a hand reaching into a basket filled with ripe, red tomatoes. The hand is positioned in the center, with fingers slightly spread, touching one of the tomatoes. The tomatoes are vibrant red with some green at the stems. The background is a dark green gradient with a yellow curved line separating it from the tomato image.

# Shopping for Organic

## Shopping for Organic

A strong majority would look for organic foods at major grocery chains. A near majority would also think to look at farmer's markets. All other outlets fall far behind in mindshare.

### Would look for organic in...



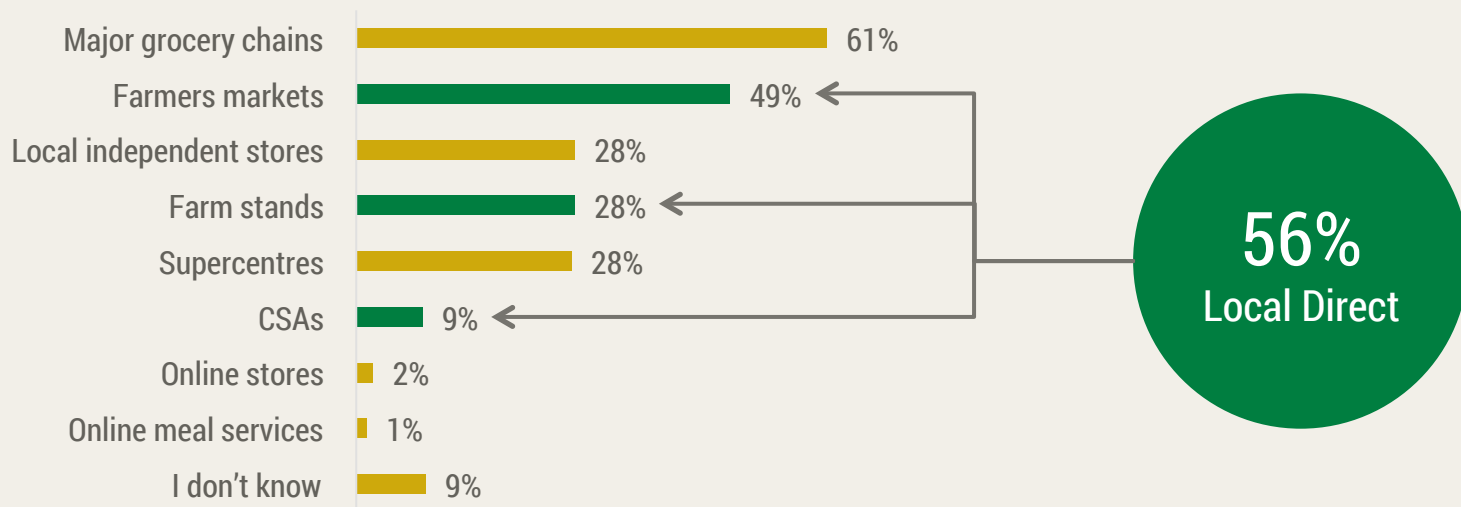
E1: If you wanted to buy organic foods today, where would you go to purchase them?



## Shopping for Organic

Just over half cite one of the local direct outlets to buy organic food, but this also means that nearly half did not think of these as places to look.

### Would look for organic in...

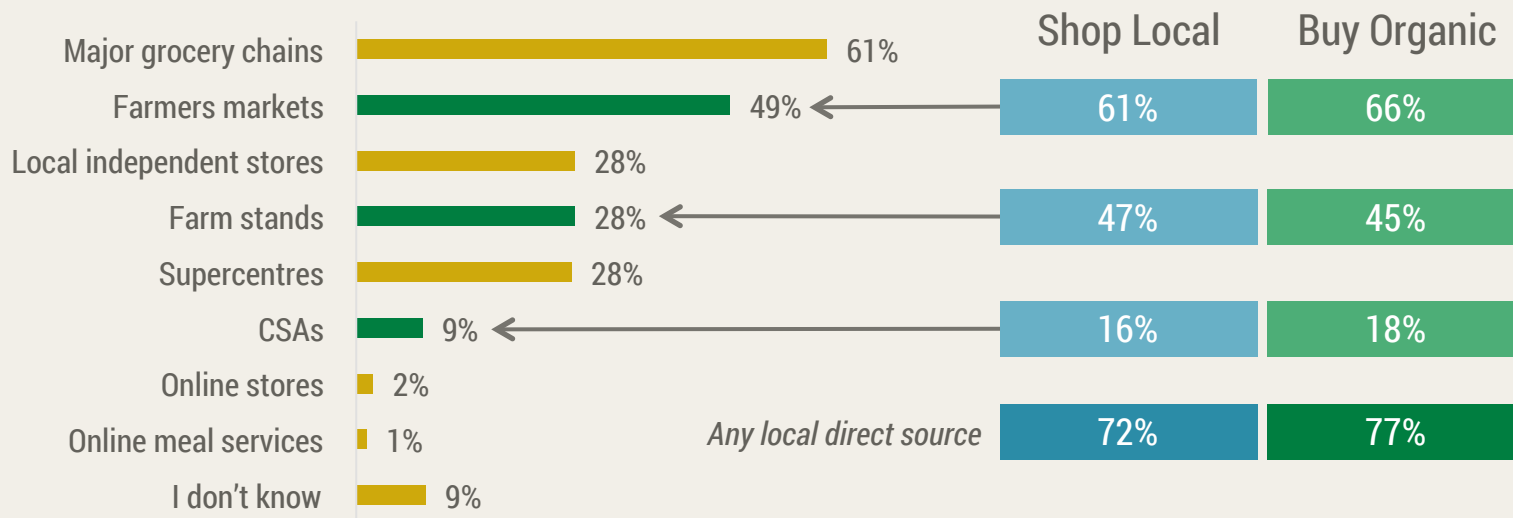


E1: If you wanted to buy organic foods today, where would you go to purchase them?

## Shopping for Organic

Those who already shop at local direct outlets, or already buy organic, are much more likely to cite the local direct sources for buying organic foods.

### Would look for organic in...



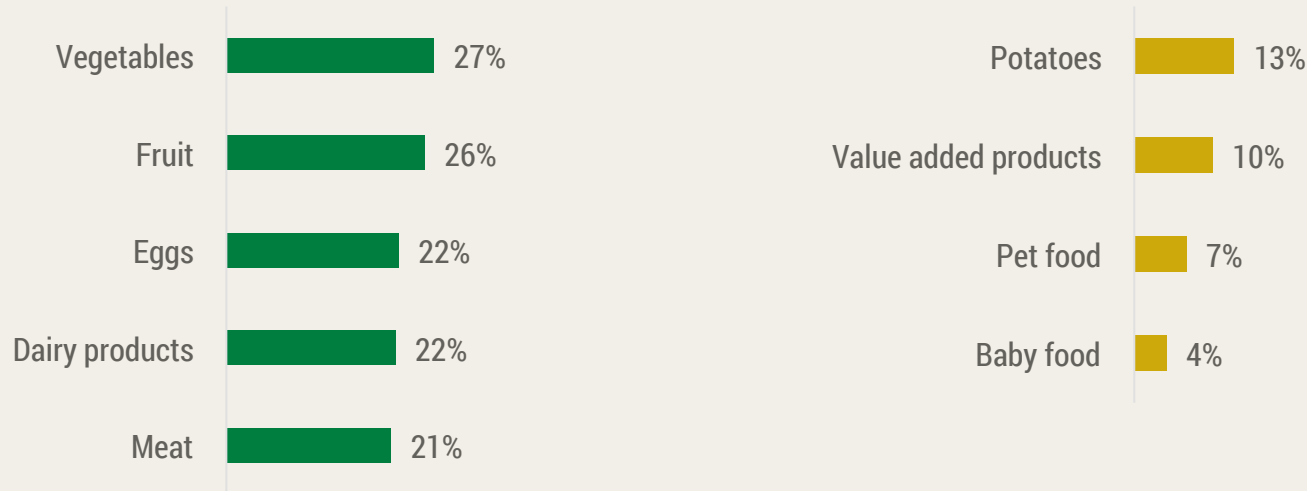
E1: If you wanted to buy organic foods today, where would you go to purchase them?

## Shopping for Organic

Vegetables and fruits are the most commonly purchased foods in organic form, followed closely by eggs, dairy products, and meat.

### Specific products purchased at least weekly

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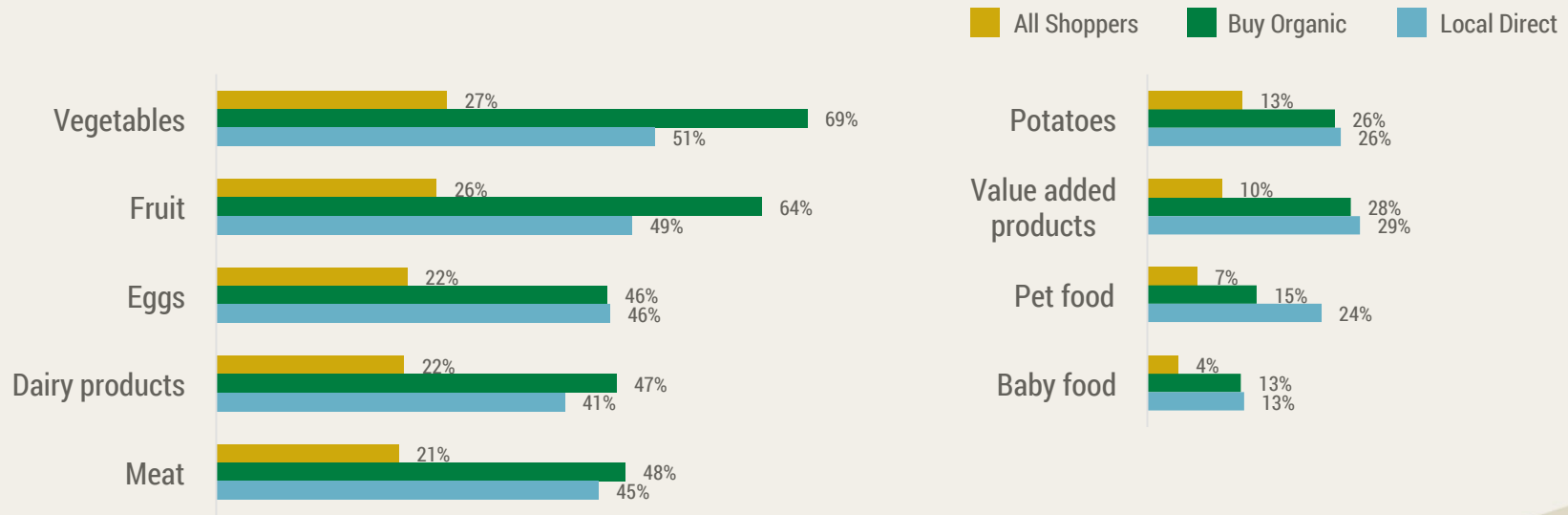


*E2: How frequently do you purchase each the following products as organic?*

## Shopping for Organic

Among those who regularly buy organic and those who shop at local direct outlets, organic product priorities are similar, but with much greater frequency.

### Specific products purchased at least weekly



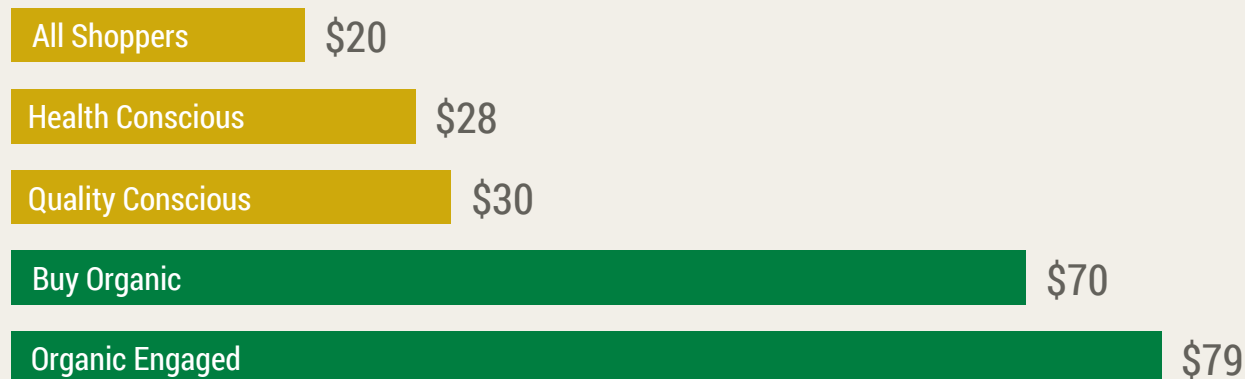
E2: How frequently do you purchase each the following products as organic?

## Shopping for Organic

Those who say they always or mostly shop for organic products report spending \$70 on these foods weekly. This is more than triple that of the average shopper.

### Average Organic Weekly Budget

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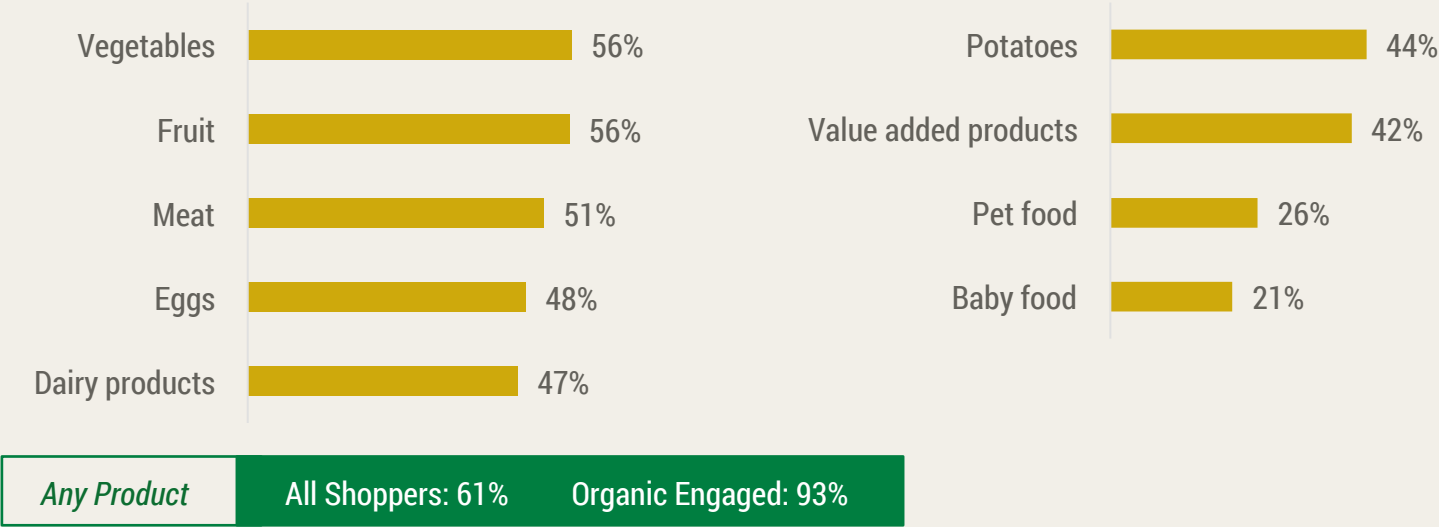


*E3: And what percent of your weekly grocery budget is usually organic items - that includes organic fruits and vegetables, organic breads and grains, organic snack foods, organic packaged foods, organic meat or poultry, organic dairy products (e.g., milk, cheese, butter), or other organic food and beverages.*

# Shopping for Organic

More than half of shoppers are willing to pay a premium for organic vegetables, fruits, and meats. Overall, 61% are willing to pay some kind of premium for at least one type of organic food.

## Willing to Pay Premium for Organic



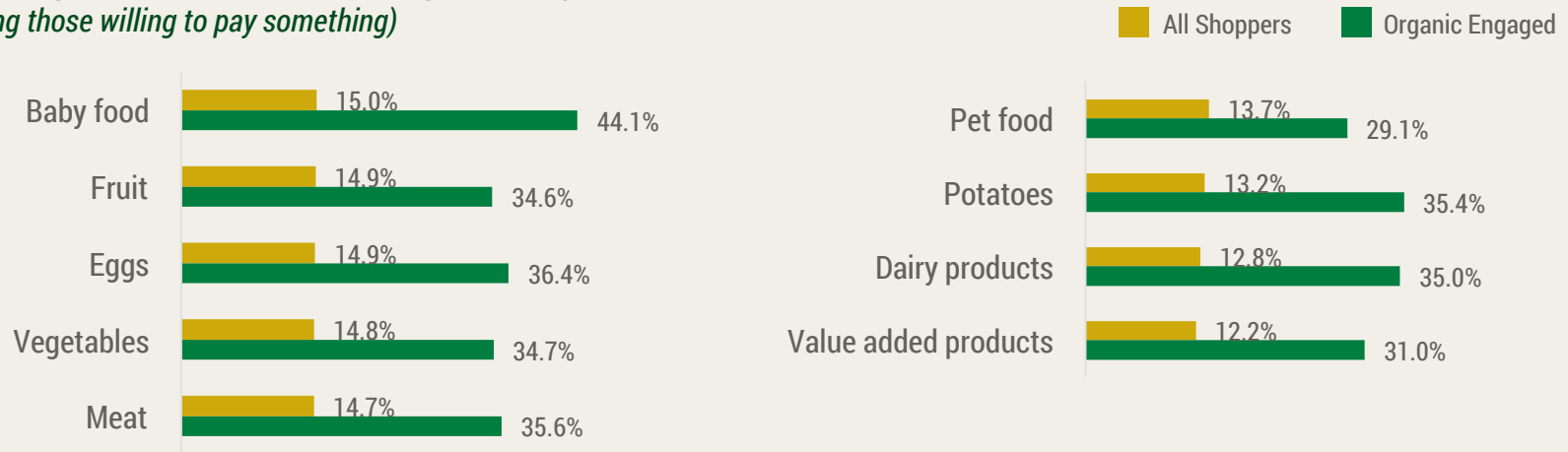
E4: Now knowing what it means for a product to be labeled as organic, how much extra are you willing to pay for each of the following?

## Shopping for Organic

Among those willing to pay a premium for each type of organic food, the premiums are highest for baby food, fruit, eggs, vegetables, and meat. However, there is not a wide spread across the various categories of food.

### Average Premium Willing to Pay

*(among those willing to pay something)*



*Average Among Products*

All Shoppers: 14%

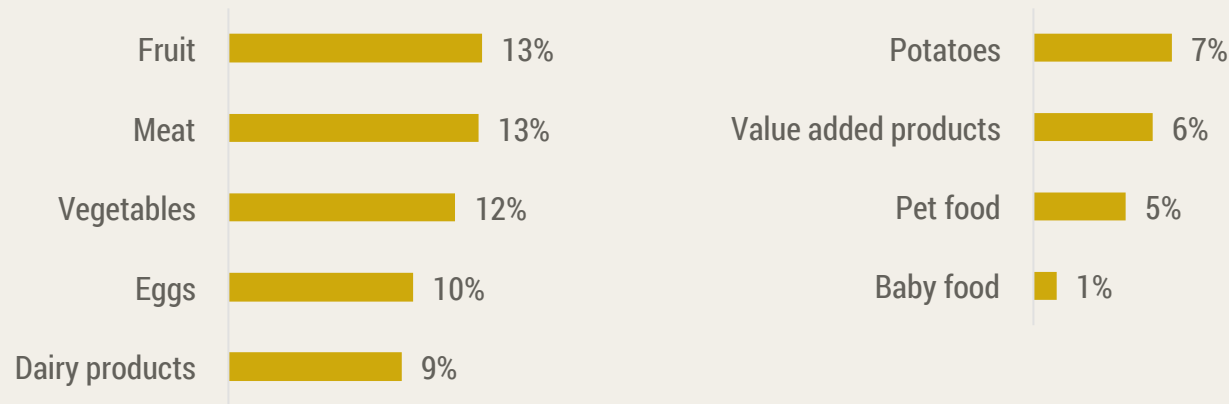
Organic Engaged: 35%

E4: Now knowing what it means for a product to be labeled as organic, how much extra are you willing to pay for each of the following?

## Shopping for Organic

There is not a predominant organic food category perceived as difficult to find, but fruit, meat, and vegetables rank highest among those shoppers are willing to buy.

### Willing to Purchase, But Not Able to Find



E5: Are there any products you would like to purchase more frequently as organic, but haven't been able to find where you most often shop?

None

71%

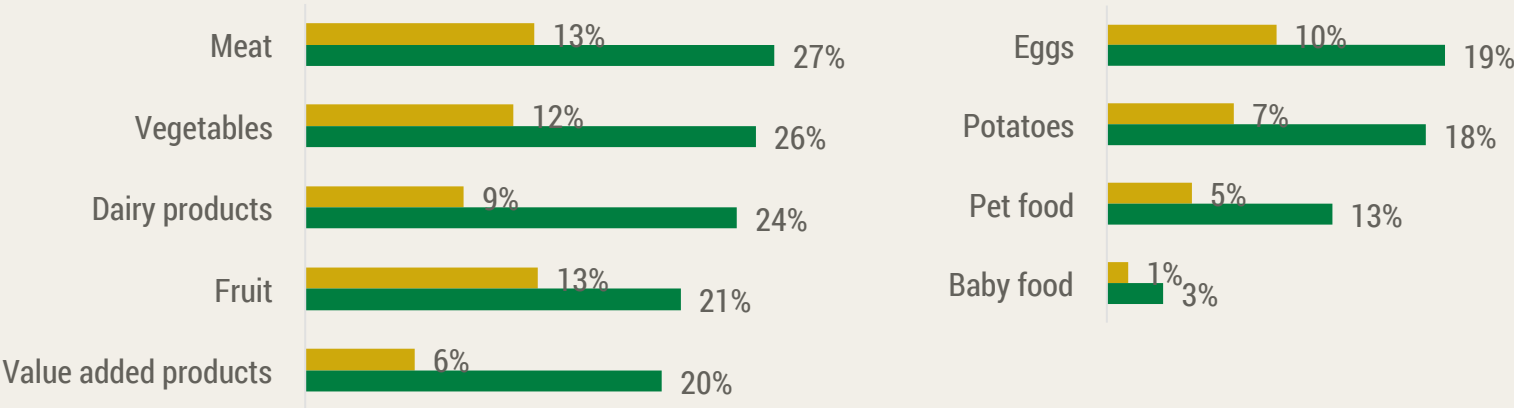


# Shopping for Organic

Those who already buy organic are much more likely to say there are other organic foods they'd like to purchase but cannot find. Meat, vegetables, and dairy top their list.

## Willing to Purchase, But Not Able to Find

All Shoppers Buy Organic



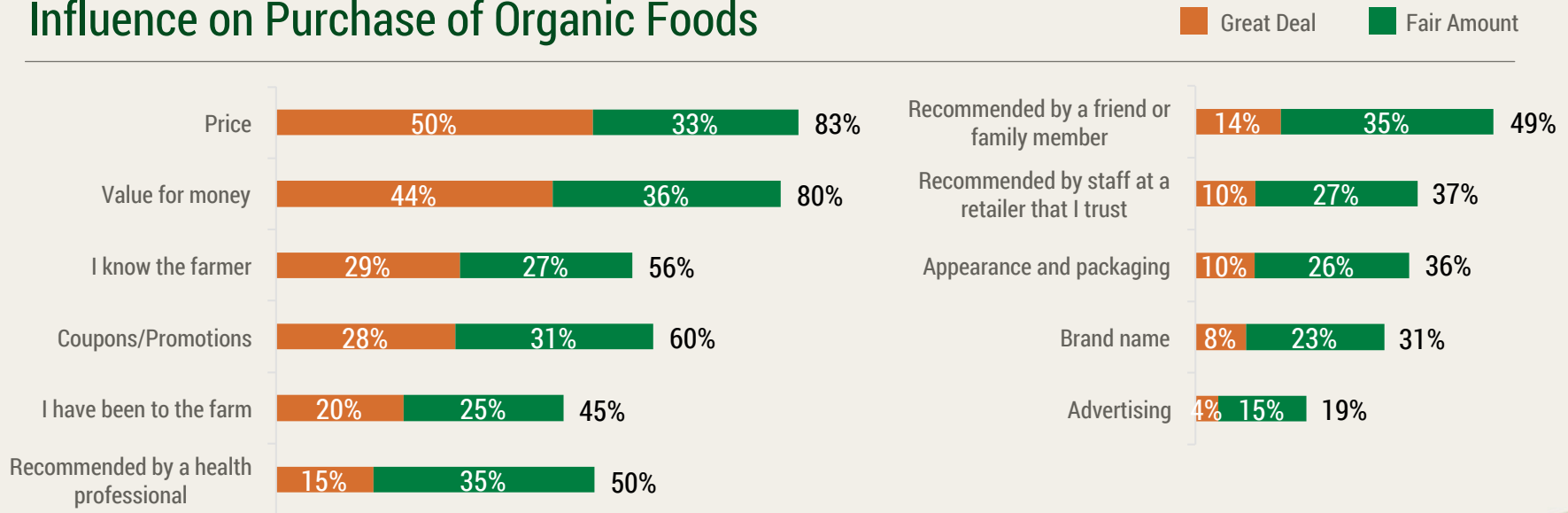
E5: Are there any products you would like to purchase more frequently as organic, but haven't been able to find where you most often shop?



## Shopping for Organic

Price and value for money top the list of influencers for shoppers if they were looking for organic foods. Coupons (relating to price), knowing the farmer, and familiarity with the farm are in a secondary category of influencers.

### Influence on Purchase of Organic Foods

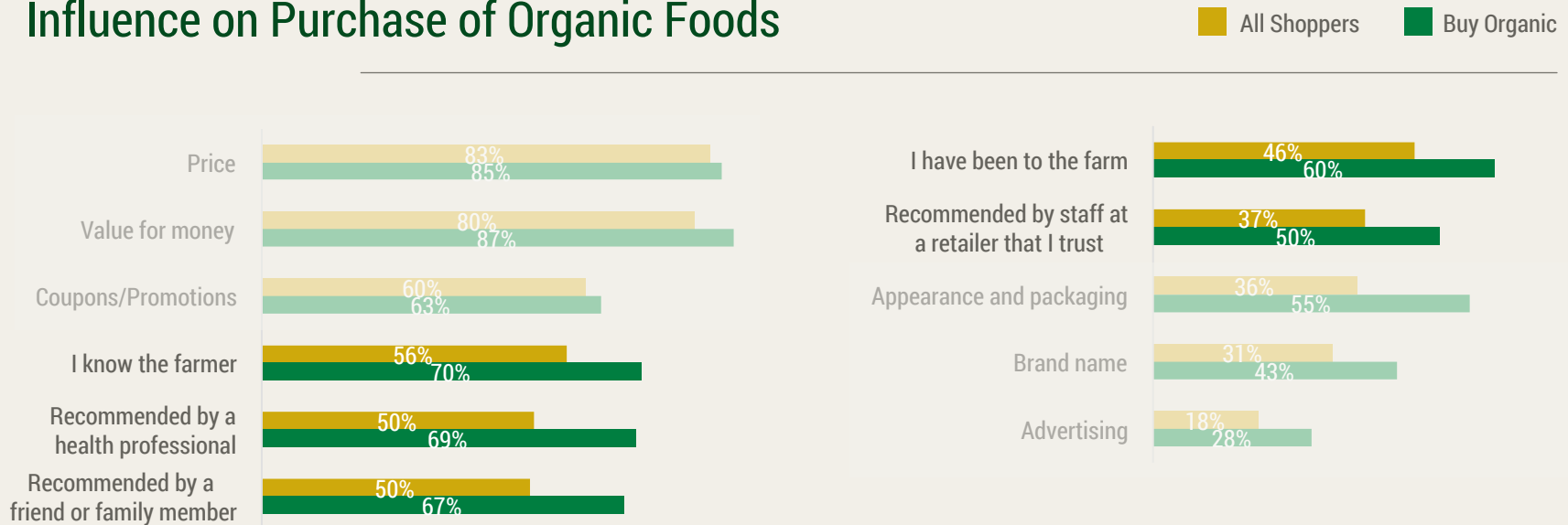


E6: If you were to shop for organic food products in the future, how much influence would the following play in what products or specific brands you buy?

## Shopping for Organic

Those who currently purchase organic tend to be more influenced by recommendations and familiarity with the farm or farmer than the average shopper. However, aspects relating to price and value still top their list.

### Influence on Purchase of Organic Foods



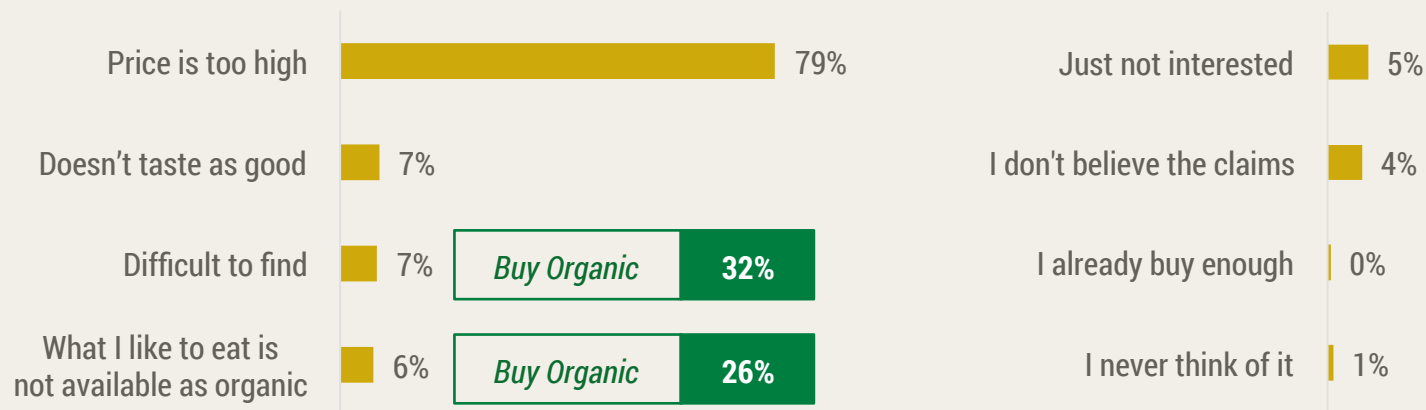
*E6: If you were to shop for organic food products in the future, how much influence would the following play in what products or specific brands you buy?*

## Shopping for Organic

Those who rarely or never buy organic foods overwhelmingly say it is because of price. Among those who already buy organic frequently, many say they don't buy more because what they want is not available or difficult to find.

### Reason for Not Purchasing Organic More Frequently

*(Among Those Buying Organic Rarely or Never)*



E7: Why do you not purchase organic products more frequently?



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Local direct outlets were described to respondents to find out why they do not shop there more frequently.

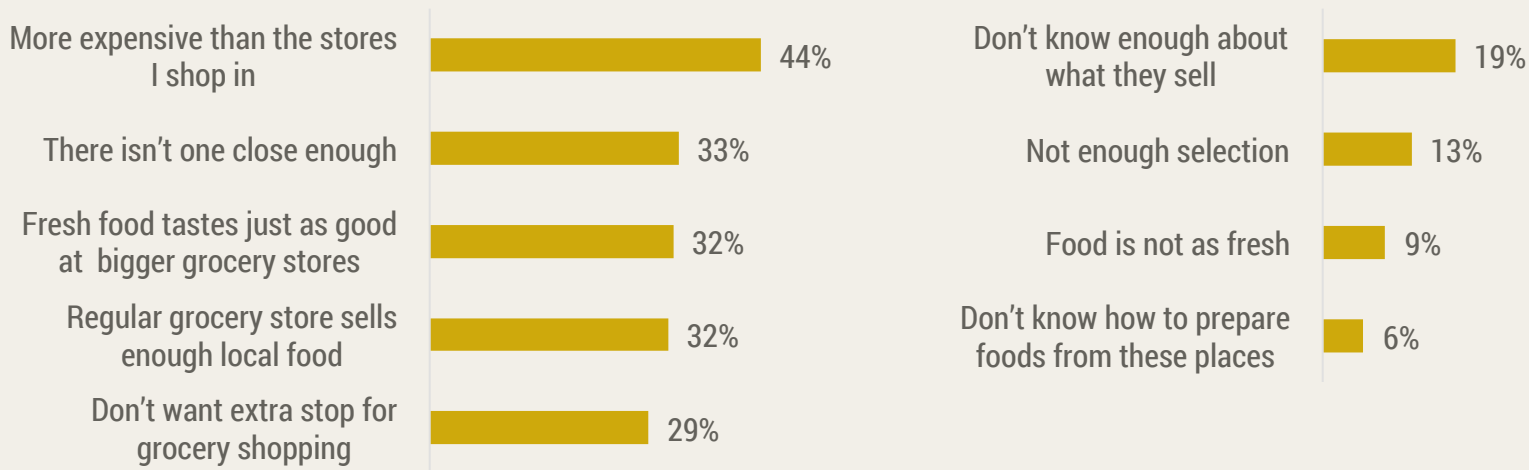
For many types of foods, there are ways to purchase them directly from the farmer, either at a farmers market, an on-farm store/veggie stand, through a farm's website, or a Community Supported Agriculture (CSA) program.

*Below are some reasons that may or may not be why you do not shop for food at these places more frequently. For each, please indicate whether it is a major reason, a minor reason, or not a reason at all.*

Those not shopping weekly at local direct outlets predominantly say it is because of cost. Proximity is a distant second, however nearly as many feel local and fresh food can be found just as easily at regular grocery stores.

## Major Reason for Not Shopping at Local Direct Outlets

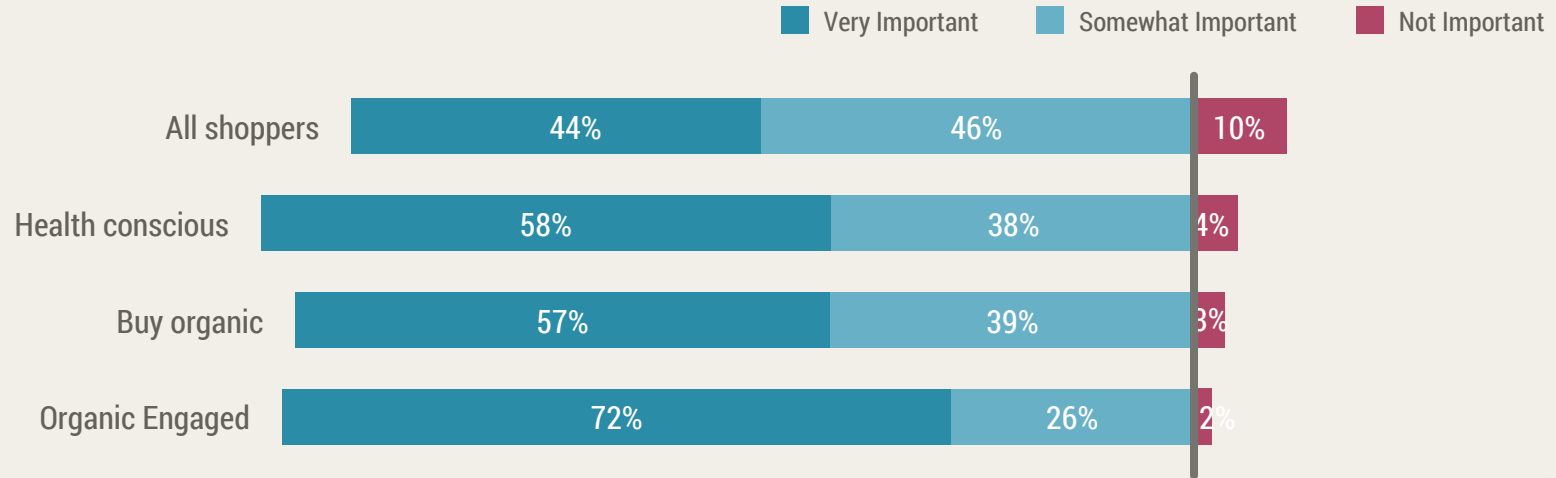
*(Among Those not Shopping Local Direct at Least Weekly)*



F1: For each, please indicate whether it is a major reason, a minor reason, or not a reason at all.

Fewer than half overall feel it is very important that organic foods be grown locally. However, it is more important to those who already shop locally or buy organic.

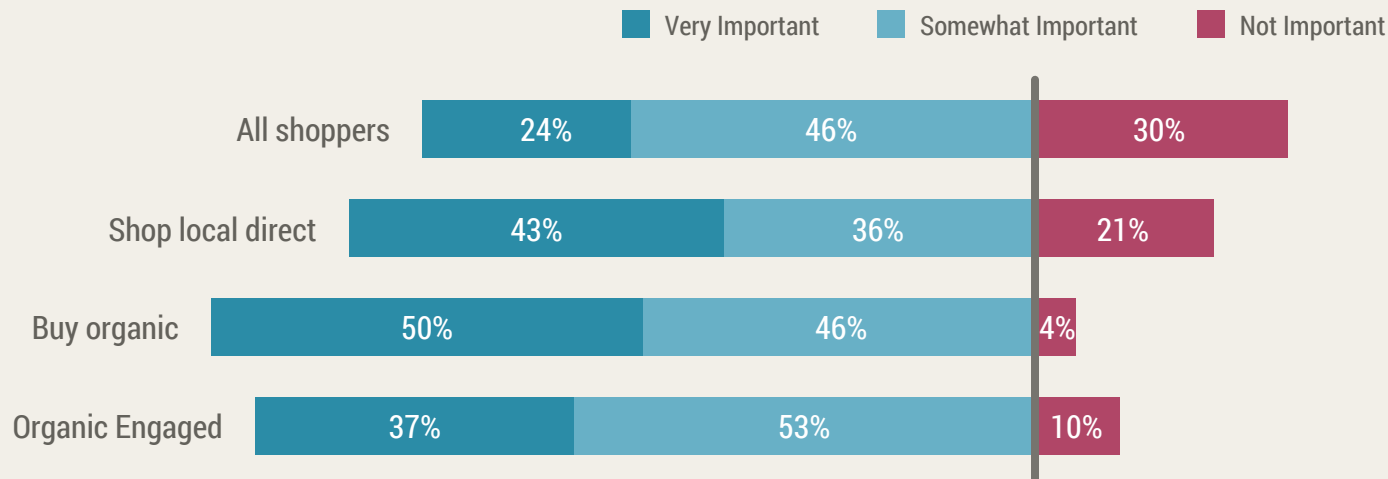
### Importance of organic foods being locally grown or produced





It is much less important to shoppers that locally grown foods be certified organic. Two-in-five who buy local direct feel this is very important, and nearly four-in-five feel it is at least somewhat important.

## Importance of Local Foods Being Certified Organic



# Conclusions



# Brand

Keeping a simple definition of “brand” in mind can help provide context for where organic exists in the marketplace, and how to effectively move forward toward better positioning.

### *is an Identity*

- What does it mean to be organic?
- How is “organic” unique?
- How do I trust something labeled as organic?

### *that Invites*

- What are the key messages?
- How do messages reach consumers?
- What brings consumers to the products?  
What resonates?

### *a Relationship*

- How do consumers feel about organic?
- What behaviour is prompted by feelings about organic?
- To what extent do consumers become promoters or detractors of the brand?

# Identity

Organic is suffering from brand confusion.

## What does it mean to be organic?

- Majorities have a *basic* understanding of what is meant by organic. But significant proportions believe some of the claims of organic are hype.
- Few are familiar with organic certification.

## How is “organic” unique?

- Many of the attributes of organic are also attributed to other labels in consumers’ minds.

## How do I trust something labeled as organic?

- There are many claims in the marketplace that have little real, consistent meaning: *All Natural, Grass Fed, Cage-Free, Free Range, Non-GMO, No artificial additives*

# Invites

Marketing and education need to be clear, concise, and targeted.

## What are the key messages?

- Messaging needs to be clear, concise, and distinguish the label in consumers' minds.

## How do messages reach consumers?

- There are various modes and channels for marketing. They need to be selected based on who you want to reach and the type of information being communicated.
- "Organic" has a layered definition. It may be best communicated in stages through targeted marketing.
- A logo can grow to communicate a nurtured image.

## What brings consumers to the products? What resonates?

- Treatment of livestock and how pests and diseases are handled resonated most clearly from the definition.
- These are among the easiest to understand statements around the process.
- It is important to also clearly address benefits to the consumer for choosing organic.

# Relationship

Changing attitudes and behaviours can be a long process that requires deliberate campaigns with consistent messages.

## How do consumers feel about organic?

- Feelings about organic need to be developed over time. It is more than education and facts—marketing needs to communicate deeper benefits to the consumer that resonate strongly enough to cause action.

## What behaviour is prompted by feelings about organic?

- Behaviours start with expressions of interest, noticing the brand/logo, learning what it means, and eventually choosing to purchase more frequently.

## To what extent do consumers become promoters or detractors of the brand?

- If preferences develop into loyalty, consumers can become strong promoters of the brand.
- If the brand is unclear, or messaging is seen as “hype,” consumers can be detractors of the brand.

# Brand

**Local** means different things to different people.

## *is an Identity*

- Canadian, your province, your county, 50 km, your community?
- Product is locally grown, retailer is locally owned, direct with no wholesaler.

## *that Invites*

- Competing with large retailer marketing is a challenge for “local” outlets, but they don’t need to attract the masses (yet).
- Unique benefits are important to communicate, but they need to be believed and positive, or they will not resonate.

## *a Relationship*

- “Local” has the unique opportunity to develop a relationship between the consumer and the producer.
- Supporting each other, helping create a stronger and healthier community.

If “**Organic**” and “**Local**” are developed and nurtured individually as brands, they can become a powerful pair that strengthen each other.





# Recommendations

## Recommendations

1. **Have a marketing plan that is understood and consistently implemented and supported among key stakeholders**—Producers, Retailers, and ACORN. If this can be integrated with a national plan, it could be even more effective.
  - Beyond development of the plan and messaging, this requires buy-in from all.
2. **Target your marketing.** Do not expect to reach and engage a mass market (at least not at first).
  - The greatest interest in local direct and organic is among those who prioritize quality (18% of market) and health conscious shoppers (24% of the market).
  - As you educate and create loyalty from these consumers, they may become ambassadors among their networks.
3. **Use a consistent mark for Organic** that will become associated with the messaging over time. Shoppers must know where to find local organic, and recognize it when they see it. Ideally, this will incorporate the Canada Organic logo for consistency, recognition, and leverage of other marketing efforts.
  - "Easy-to-find" is a top priority for all shoppers, but especially health conscious ones.
  - Many find organic too inconvenient to find and purchase.

## Recommendations

4. **The mark should indicate that standards have been met** within its design or through messaging.
  - A vast majority of all shoppers say it is important that certification be visible.
  - There is currently only low-level knowledge of certification and some believe it isn't real.
5. **Communications on certification should focus on the “how,”** to develop trust in the “what.” It is not enough to just refer to health, ecology, fairness, and care.
  - Consumers are more drawn to how livestock is housed, fed, transported, and slaughtered, and how pests and diseases are treated. These are closer to concrete and more credible in a time when there is marketing skepticism.
6. **Focus messaging on what makes organic unique and appealing to the target markets.**
  - The quality and health conscious targets particularly value nutrition, environmentally-friendly, taste, and knowing how the food was grown.

## Recommendations

7. **Subtly correct misnomers about organic in messaging**, by communicating phrases such as "Naturally treated" and "Inspected and approved."
  - Many believe no sprays nor pesticides are used. This may leave an impression of lower quality or inferior taste for some.
  - Some believe organic may be just a marketing term
8. **Use consistent and expanded messaging at farm stands and markets.**
  - Target markets are more likely than general shoppers to look for organic at these locations.
9. **Charge a premium of 12%-15% above non-organic** to signal superior quality and health benefits that will be reinforced by messaging.
  - Value for money is effectively as important as price in shopping for organic foods, so if the value can be effectively communicated, the price can be supported.

A row of yellow shopping carts is parked in a store aisle. The background is blurred, showing shelves with various products. A large green and yellow curved graphic overlay is on the right side of the image.

# National Comparisons

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### Buy Organic (at Least) Weekly



*New Brunswick  
& Nova Scotia*

**19%**

- 33% health conscious
- 36% quality conscious



*Canada*

**66%**

#### Caveats

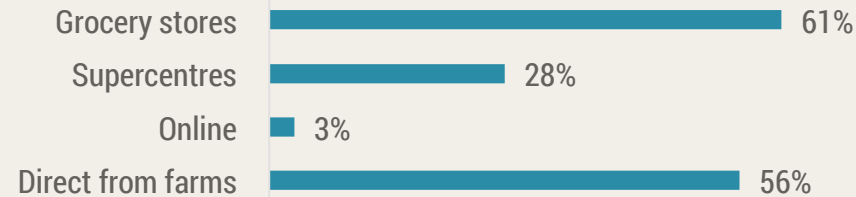
Question wording and approach differs:

- NS/NB: Specifically look to purchase organic when grocery shopping (among list of nine food types) on a five point frequency scale
  - Buyers=Always/Most of the time
- National: Proportion organic represents of weekly budget
  - Buyers=1%+ of weekly budget

# Where Organic Groceries are Purchased



### Where *Would* Purchase Organic



### Where *Currently* Purchase Organic

