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Empirical Study

New Target Groups in the Organic Food Market (Bio+Pro)

The German market for organic food products has expanded considerably over the last few years. Yet, so far the market share of organic food products still hovers around the three percent mark. However, consumer surveys have indicated a growing interest on the part of the consumers, which points to a significant potential for organic food products. Strategies to increase sales of organic food products will only be successful, if wishes and preferences of consumers are met appropriately. Since consumption of organic food is no longer a matter of idealistic eco-activists, it is necessary to develop a more profound understanding of different consumers' preferences.

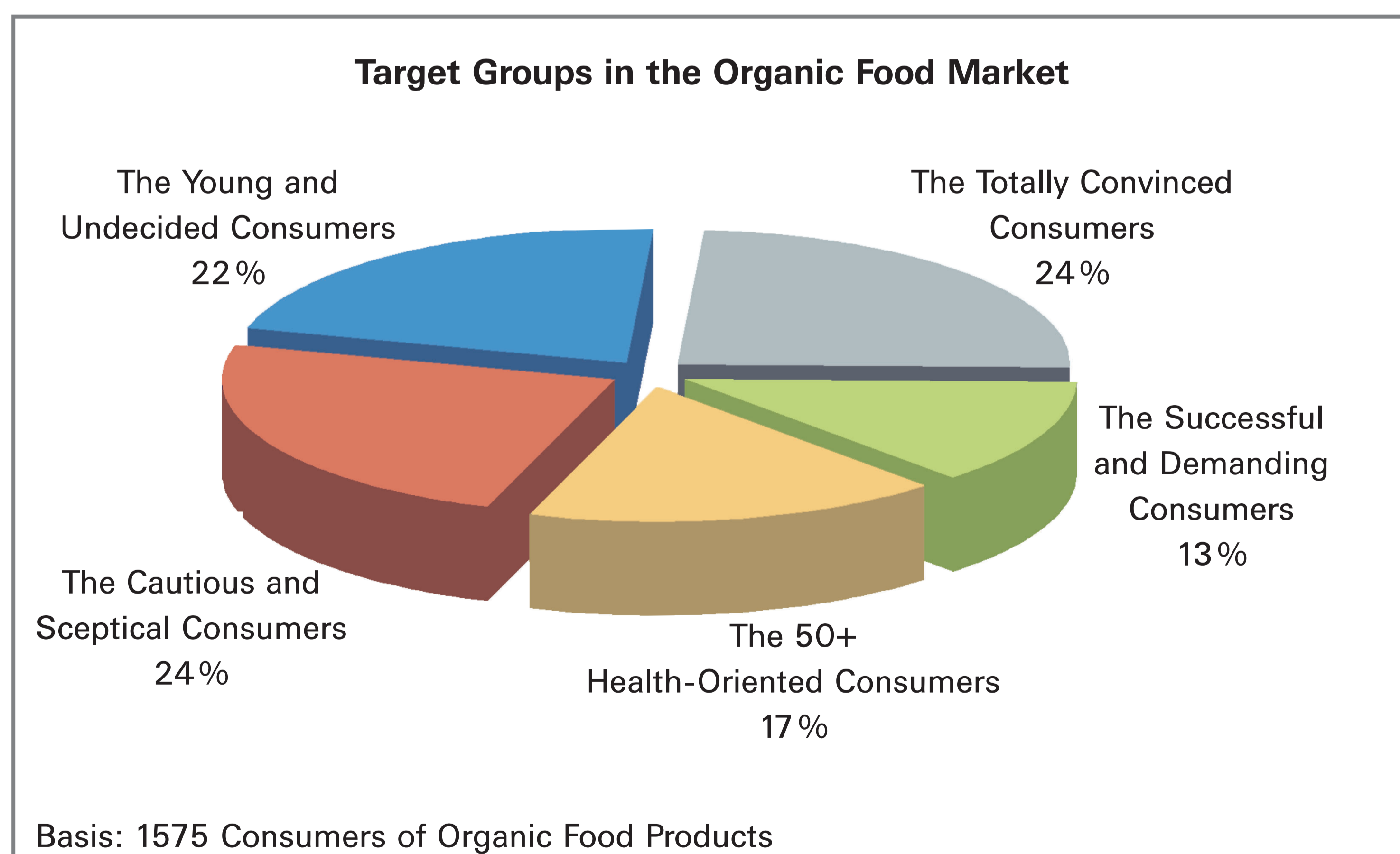
Starting with the assumption that preferences for organic food products vary considerably among different consumer groups, the identification of target groups focuses particularly on lifestyles and attitudes, but also takes the social situation, life phase and household organisation into account.

Approach

The study is based on social-ecological lifestyle analysis, drawing on qualitative and quantitative methodologies. The survey focuses exclusively on organic food consumers. Within a representative sample of 2.920 adult purchasers of food in Germany 1.575 organic food users (54%) were identified and selected for further investigation of their attitudes, motives, preferences as well as their buying habits, preferred organic product groups and their shopping preferences related to organic food. Segmentation of target groups was carried out by analysis of attitude and motivation variables with multivariate methods.

Research Results

Women constitute the majority of organic food product consumers. Organic food is particularly popular among middle aged and older consumer groups, the 40-60 year olds. Figures are clearly lower for those under 30. Besides environmental and ethical considerations, health, wellness, food product safety issues (absence of genetic modified organisms and synthetic fertilizers etc.) or compassion for animals turned out to be strong motives for the preference of organic food. Yet, the representative survey made clear that a typical consumer of organic products does not exist. Rather, it was possible to identify five target groups among organic food product consumers:



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Target Groups

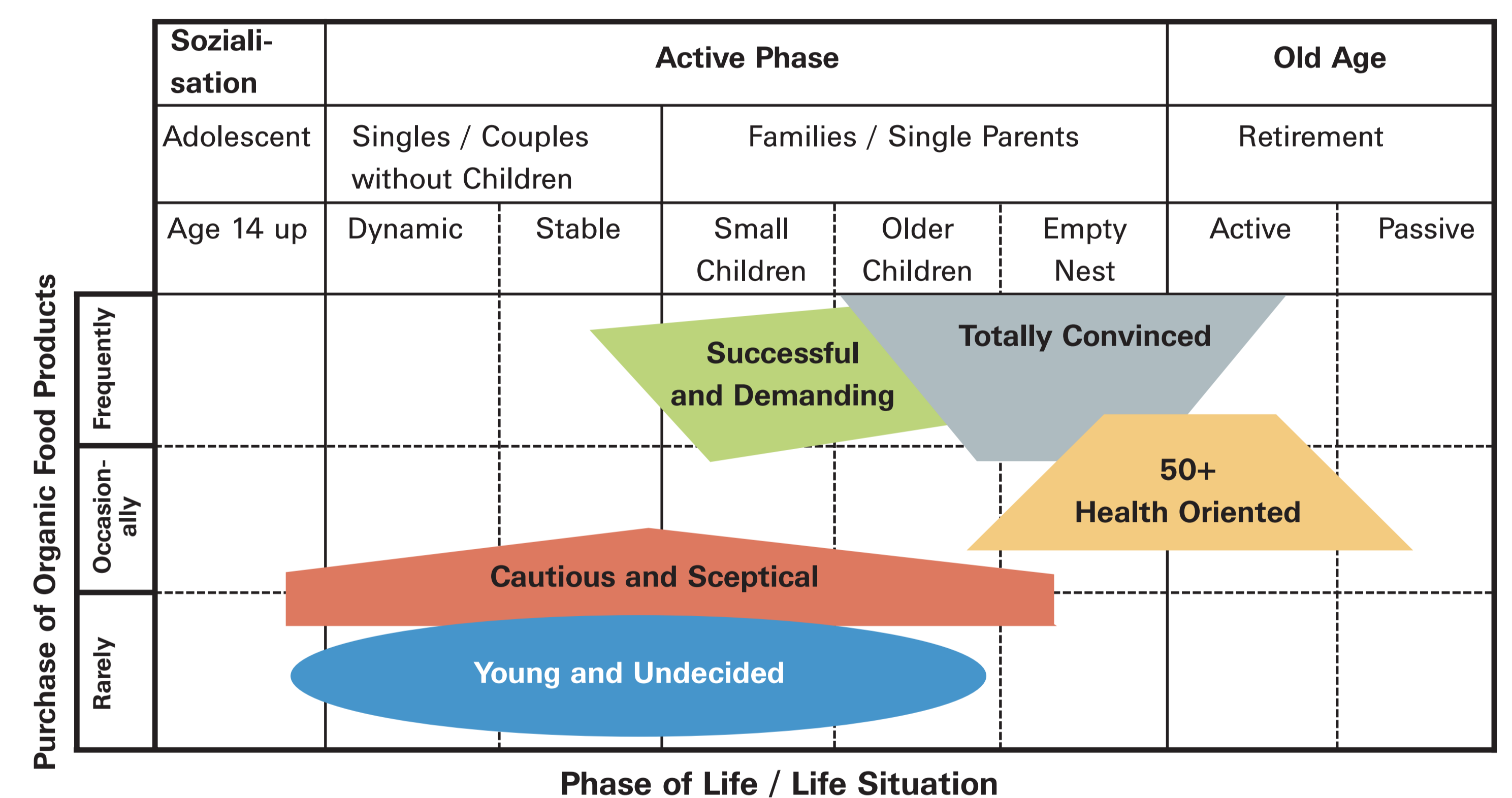
Totally Convinced Consumers

For the Totally Convinced Consumers (»Ganzheitlich Überzeugte«) ethical considerations and epicurean enjoyment are the basis of sustainable eating habits which also include organic food products. Among this group, middle-aged families with older children, couples and empty nesters are predominant. Representing 25% of organic food consumers, the totally convinced consumers account for about 40% of the sales on the organic food market.

Successful and Demanding Consumers

The Successful and Demanding Consumers (»Arriviert Anspruchsvolle«) also represent a large market potential, which has not yet been fully tapped. Among this group, young and middle-aged women are clearly over-represented. The well-being of a child or children is a central motive for buying organic food products. This group sets particularly high value on marketing and presentation of the product. With 13% of all organic food consumers, this group accounts for 23% of the sales.

ISOE Model of Social Positioning: Crucial Focal Points of Target Groups



50+ Health Oriented Consumers

Due to their advanced age, the 50+ Health Oriented Consumers (»50+ Gesundheitsorientierte«) rely on organic food products for health reasons. These consumers appreciate qualified information and advice. Many of these consumers are frequent buyers, but often have only a low income. This group accounts for 17% of the consumers and an equal share of sales in the organic food market.

Cautious and Sceptical Consumers

The Cautious and Sceptical Consumers (»Distanziert Skeptische«) is the only group where men are the majority. This group contains primarily spontaneous and occasional buyers. Simple preparation (convenience) plays a crucial role. This group accounts for only 13% of organic food turnover. Due to its share of 20% among the organic food purchasers and its relatively high income, the group has a considerable potential.

Young and Undecided Consumers

The Young and Undecided Consumers (»Junge Unentschiedene«) are strongly price-oriented and buy organic food products only spontaneously and sporadically. They considerably doubt the personal usefulness of organic food products. With a share of 20% of organic purchasers, the group only accounts for 5% of the sales.

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