BORD BIA
IRISH FOOD BOARD

Attitudes towards Organic Food

September 2020

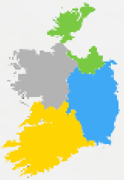
Prepared by
Luke Reaper

J.202252

B&A RESEARCH & INSIGHT

BORD BIA Thinking House

Introduction



The survey was administered to a nationally representative sample of 1,006 respondents initially.

Interviewing is conducted online.

A quantitative online survey of 985 grocery shoppers aged 16+ harnessed.

The sample is quota controlled by gender, age, socio-economic status, and geographical region.

The fieldwork for this study was conducted 17th - 30th September 2020.

Significant differences (95% level) vs. the total sample are noted by red (lower) and green (higher) shading throughout.

Findings

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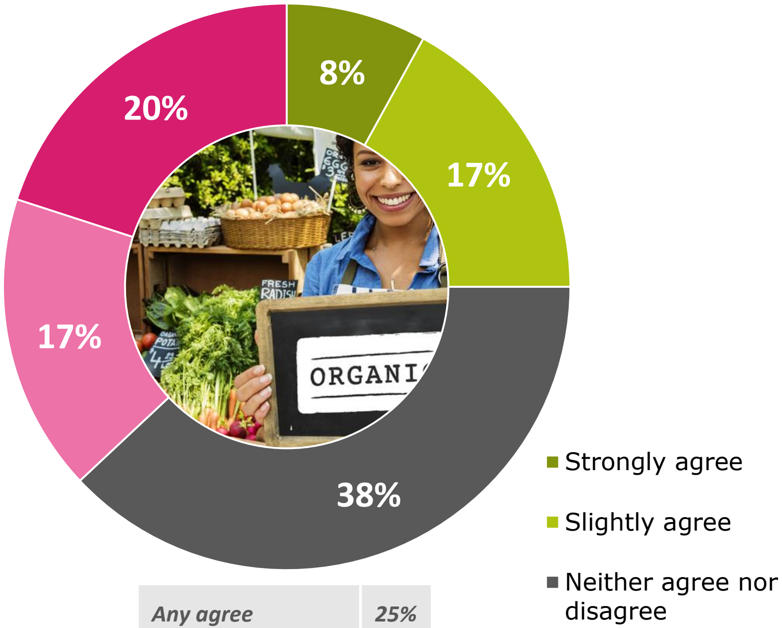
Attitudes to organic and locally produced foods

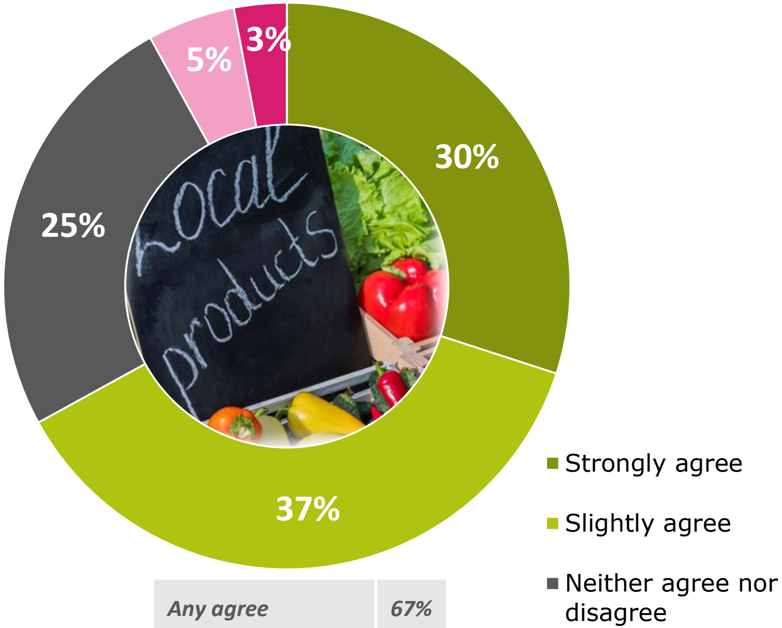
Base: All Grocery Shoppers - 985

I have purchased more organic food since Covid 19



Any agree	*25%*
Any disagree	*37%*

I would choose locally produced Irish food over organic food



Any agree	*67%*
Any disagree	*8%*

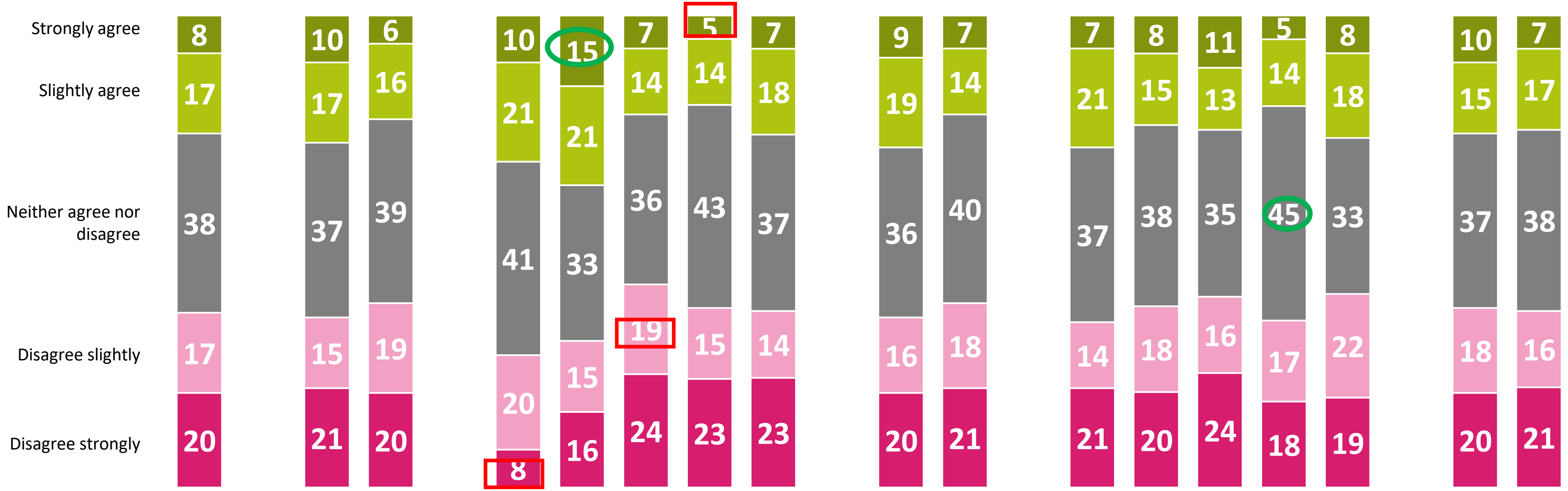
Organic has benefited to some extent with one quarter buying more since Covid. However local trumps organic for 2 in 3 shoppers.

Q.2 To what extent do you agree or disagree ...

Level of agreement: I have purchased more organic food since Covid 19 x demographics

Base: All Grocery Shoppers - 985

Significant @ 95% vs total
Higher
Lower



	Total	Gender		Age					Social Class		Region					Kids in HHold	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Lein-ster	Mun-ster	Conn/Ulster	Yes	No
UNWTD	*985*	*453*	*532*	*72*	*176*	*308*	*266*	*163*	*493*	*492*	*290*	*695*	*245*	*273*	*177*	*308*	*668*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
- ANY Agree	25	27	23	31	35	20	19	25	28	21	28	23	25	19	27	25	25
- ANY Disagree	37	37	38	28	31	44	38	37	36	39	35	38	40	35	40	39	37
Mean	2.75	2.78	2.71	3.04	3.02	2.59	2.62	2.73	2.82	2.68	2.80	2.73	2.72	2.71	2.76	2.75	2.74

Increased organic purchasing emanates from under 35.

Q.2 To what extent do you agree or disagree ...

Level of agreement of: I would choose locally produced Irish food over organic food x demographics

Base: All grocery shoppers – 985

Significant @ 95% vs total
Higher Lower

- ANY Agree	67		68	65		72	68	59	68	73		69	64		68	66	69	61	69		65	68
- ANY Disagree	8		8	8		8	8	11	6	6		6	10		4	10	10	9	9		9	7
Mean	3.85		3.88	3.83		3.84	3.85	3.72	3.91	4.01		3.90	3.80		3.93	3.82	3.84	3.73	3.93		3.84	3.87

Locally produced food preference strong across the demographics.

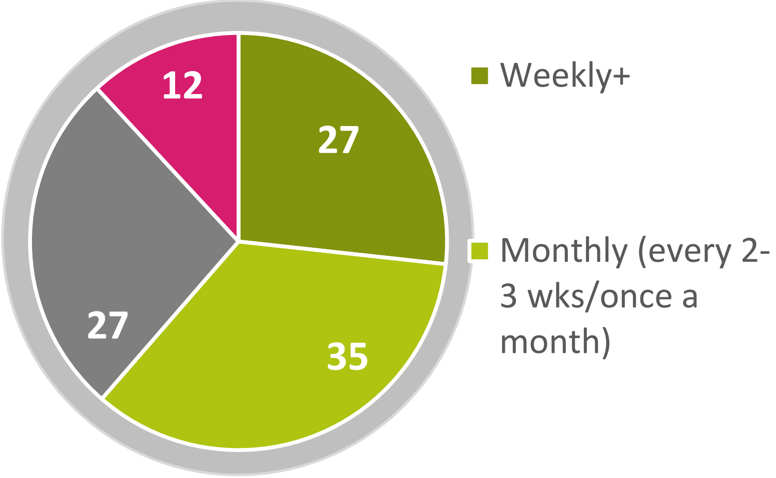
Q.2 To what extent do you agree or disagree ...

Frequency of buying organic food

Base: All Grocery Shoppers - 985

Total

%



Ever	*88%*
Never	*12%*

Strong incidence of every buying organic foods, but weekly+ purchasing stands at 27%.

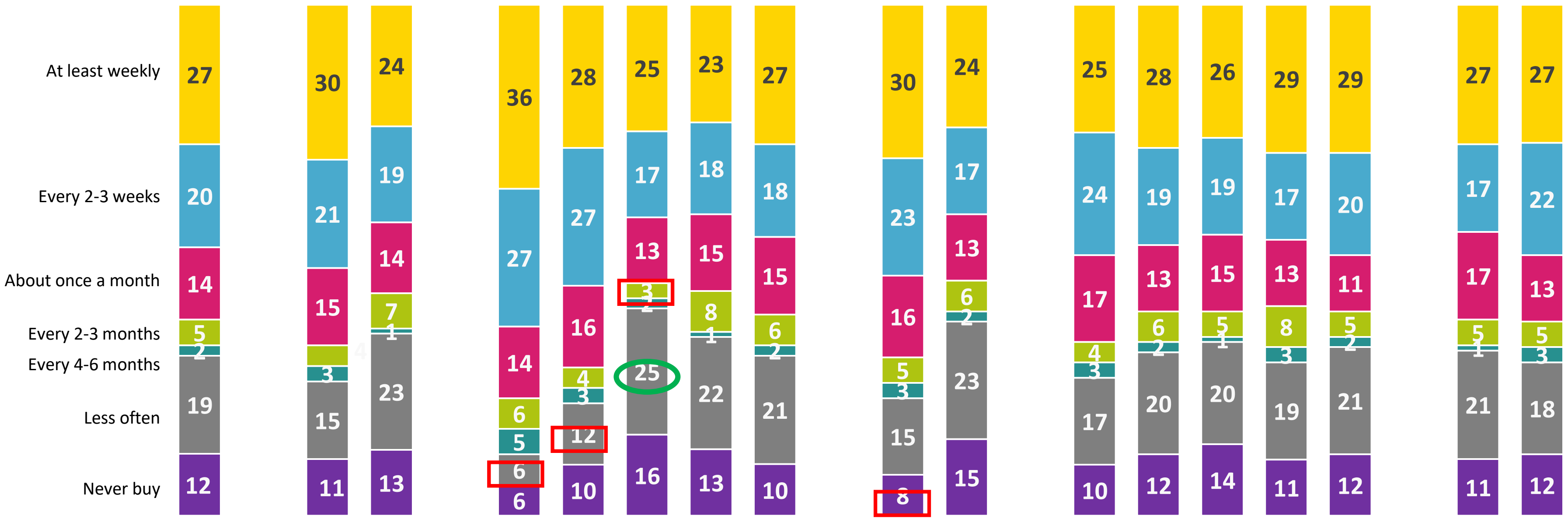
Q.3 How often, if at all, do you buy any organic food nowadays?

Frequency of buying organic food x demographics

Base: All Grocery Shoppers - 985

Significant @ 95% vs total
Higher Lower

	Total	Male	Female	16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/Ulster	Yes	No
		Gender		Age					Social Class		Region					Kids in HHold	
UNWTD	985	453	532	72	176	308	266	163	493	492	290	695	245	273	177	308	668
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%



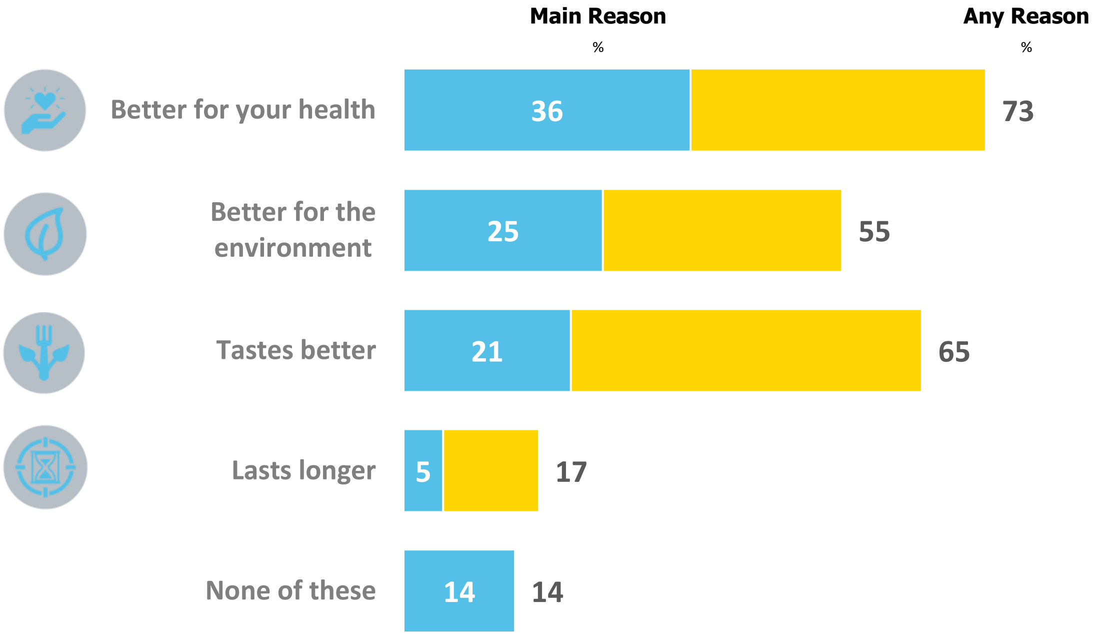
	Total	Male	Female	16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/Ulster	Yes	No
EVER	88	89	87	94	90	84	87	90	92	85	90	88	86	89	88	89	88
NEVER	12	11	13	6	10	16	13	10	8	15	10	12	14	11	12	11	12

Stronger monthly+ organic food purchasing amongst middle class and under 35 year old shoppers.

Q.3 How often, if at all, do you buy any organic food nowadays?

Reasons for buying organic food

Base: All grocery shoppers that ever buy organic food - 869



Health is the main reason to buy organic food followed by 'better for the environment' and 'taste'. Note taste edges environment at the total level as a reason but health still No.1.

Q.4 Which of the following is the main reason for buying organic food?Q.5b And can you rank the top three factors that guide you most? ...

Main Reason for buying organic food

Base: All grocery shoppers that ever buy organic food - 869

Significant @ 95% vs total
Higher Lower

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	Total	Gender		Age					Social Class		Region					Kids in HHold		Area	
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Mun-ster	Conn/ Ulster	Yes	No	Urban	Rural
UNWTD	*869*	*403*	*466*	*68*	*160*	*264*	*231*	*146*	*452*	*417*	*259*	*610*	*211*	*242*	*157*	*273*	*587*	*645*	*224*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Better for your health	36	38	35	42	34	37	34	36	36	37	34	37	32	39	42	35	37	36	36
Better for the environment	25	26	23	22	26	21	27	28	25	24	28	23	25	26	16	24	25	25	24
Tastes better	21	19	23	18	20	21	24	21	22	20	18	22	26	18	21	20	21	19	24
Lasts longer	5	4	5	6	8	3	4	4	5	4	4	5	4	5	5	5	4	5	3
None of these	14	13	14	12	12	18	12	12	13	15	15	13	12	12	17	17	13	14	13

Q.4 Which of the following is the main reason for buying organic food?Q.5b And can you rank the top three factors that guide you most? ...

Top 3 Reasons for buying organic food

Base: All grocery shoppers that ever buy organic food - 869

Significant @ 95% vs total
Higher Lower

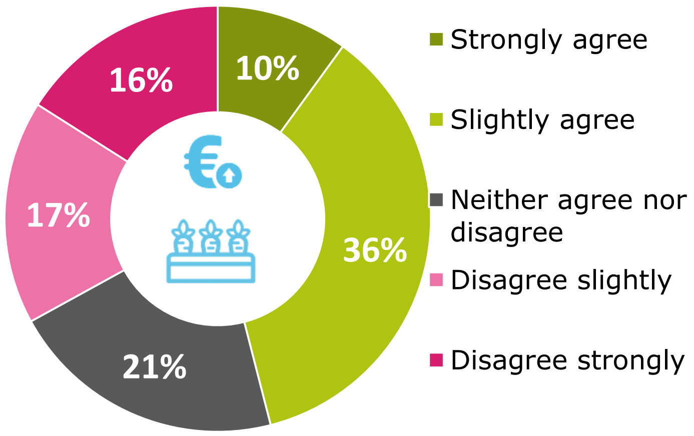
	Total	Gender		Age					Social Class		Region					Kids in HHold	
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Lein-ster	Mun-ster	Conn/ Ulster	Yes	No
UNWTD	*869*	*403*	*466*	*68*	*160*	*264*	*231*	*146*	*452*	*417*	*259*	*610*	*211*	*242*	*157*	*273*	*587*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Better for your health	73	73	72	73	72	70	74	76	73	72	71	73	67	80	72	67	75
Tastes better	65	64	65	66	66	57	66	72	64	65	60	66	69	65	65	57	68
Better for the environment	55	56	54	55	62	52	55	51	56	54	56	55	56	55	52	57	54
Lasts longer	17	15	20	15	23	15	17	16	16	19	16	18	18	18	17	19	16
None of these	14	13	14	12	12	18	12	12	13	15	15	13	12	12	17	17	13

Q.4 Which of the following is the main reason for buying organic food?Q.5b And can you rank the top three factors that guide you most? ...

Attitudes to purchasing organic food

Base: All Grocery Shoppers - 985

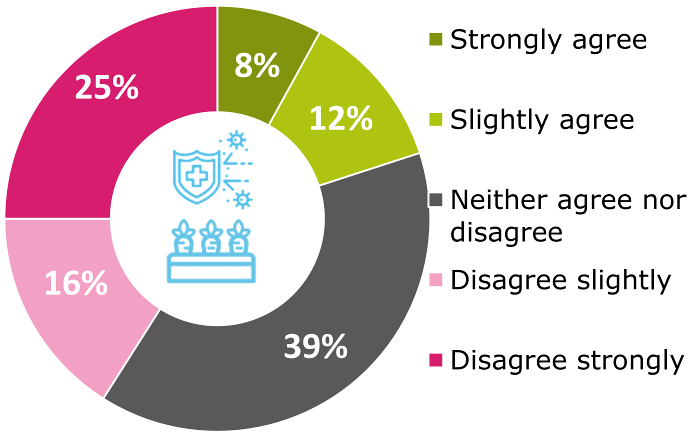
I am willing to pay more for organic food



Any agree	*47%*
Any disagree	*33%*

Just under half are willing to pay more for organic food.

I think that organic food helps in the health defence against Covid



Any agree	*20%*
Any disagree	*41%*

Although health is the No.1 reason for buying organic, only 1 in 5 agree that organic food helps in the health defence against Covid.

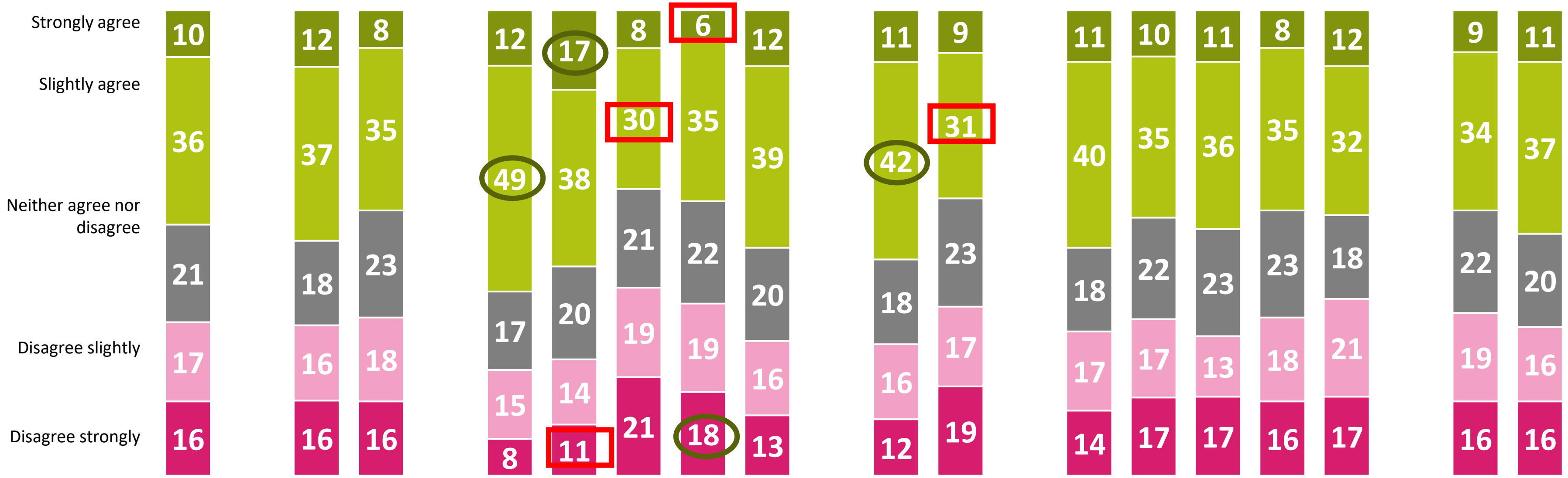
Q.5 To what extent do you agree or disagree ...

Level of agreement: I am willing to pay more for organic food x demographics

Base: All Grocery Shoppers - 985

Significant @ 95% vs total
Higher Lower

	Total	Gender		Age					Social Class		Region					Kids in HHold	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Lein-ster	Mun-ster	Conn/Ulster	Yes	No
UNWTD	*985*	*453*	*532*	*72*	*176*	*308*	*266*	*163*	*493*	*492*	*290*	*695*	*245*	*273*	*177*	*308*	*668*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
- ANY Agree	47	50	44	60	55	38	41	51	53	40	51	45	47	43	45	43	48
- ANY Disagree	33	32	34	23	25	40	37	29	29	37	31	34	30	34	38	34	32
Mean	3.08	3.13	3.03	3.40	3.36	2.85	2.92	3.20	3.23	2.94	3.17	3.05	3.10	3.01	3.02	3.02	3.11



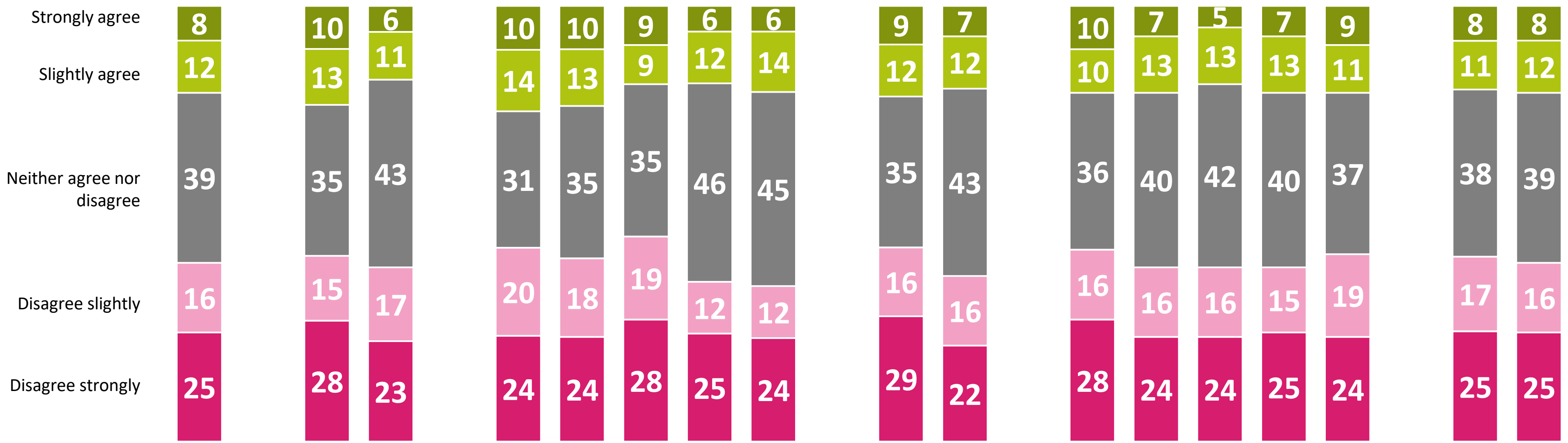
Those aged under 35 and those from the middle class cohort are more likely to pay more for organic food.

Q.5 To what extent do you agree or disagree ...

Level of agreement: I think that organic food helps in the health defence against Covid x demographics

Base: All Grocery Shoppers - 985

	Total	Gender: Male	Gender: Female	Age: -24	Age: 25-34	Age: 35-49	Age: 50-64	Age: 65+	Social Class: ABC1F	Social Class: C2DE	Region: Dublin	Region: Outside Dublin	Region: Lein-ster	Region: Mun-ster	Region: Conn/Ulster	Kids in HHold: Yes	Kids in HHold: No
UNWTD	***985***	***453***	***532***	***72***	***176***	***308***	***266***	***163***	***493***	***492***	***290***	***695***	***245***	***273***	***177***	***308***	***668***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%



	Total	Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/Ulster	Yes	No
- ANY Agree	20	22	17	25	23	17	18	19	20	19	21	19	18	20	20	20	20
- ANY Disagree	41	43	40	44	42	48	36	36	45	38	44	41	40	40	43	42	41
Mean	2.61	2.61	2.60	2.67	2.68	2.50	2.62	2.66	2.55	2.66	2.60	2.61	2.58	2.63	2.63	2.60	2.61

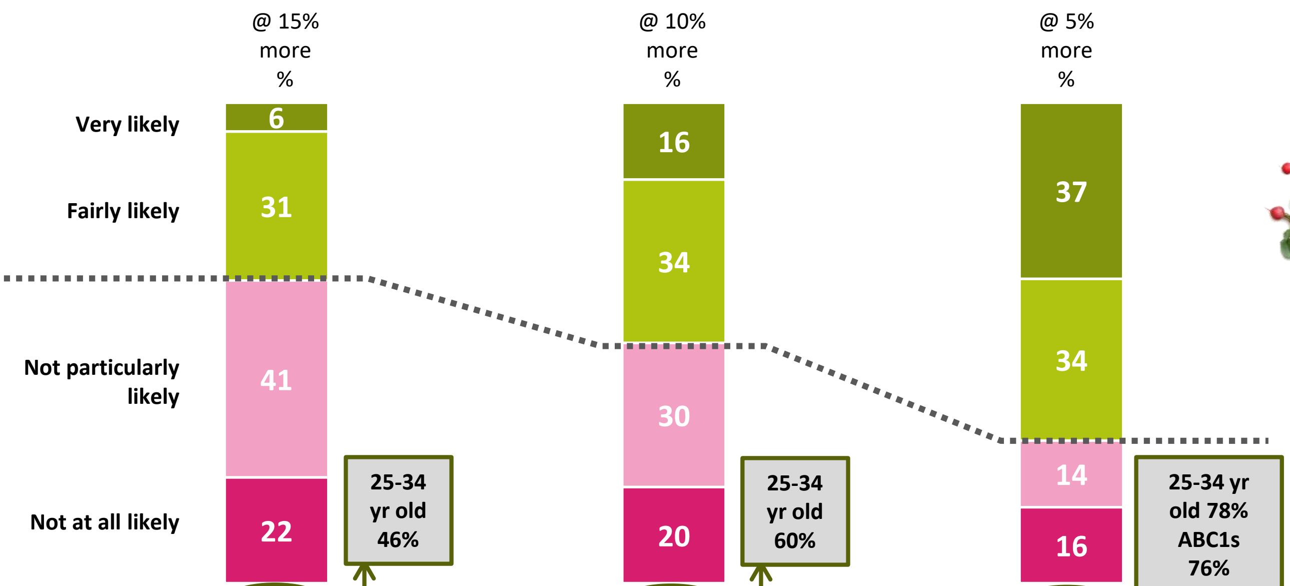
Only weekly organic buyers have a higher level of agreement that organic food helps in the health defence against Covid (34% vs 20% all grocery shoppers).

Q.5 To what extent do you agree or disagree ...

Likelihood of spending more to buy organic instead of non-organic food

Base: All Grocery Shoppers - 985

Likelihood of buying organic food at ….



	@ 15% more	@ 10% more	@ 5% more
LIKELY	37%	50%	70%
NOT LIKELY	63%	50%	30%

Analysing just the very likely figure 37% would be very likely to spend 5% more on organic, but only 16% would spend 16% more, while 6% would spend 15% more. Thus a 10% premium is probably the max price premium.

Q.6a How likely are you to spend 15% more to buy organic food instead of non-organic food (ie such as fruit and vegetables, meat, etc)?
Q.6b How likely are you to spend 10% more to buy organic food instead of non-organic food (ie such as fruit and vegetables, meat, etc)?
Q.6c How likely are you to spend 5% more to buy organic food instead of non-organic food (ie such as fruit and vegetables, meat, etc)?

Likelihood of spending 15% more to buy organic instead of non-organic food

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Base: All Grocery Shoppers - 985

	Total	Gender		Age					Social Class		Region					Kids in HHold	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Lein-ster	Mun-ster	Conn/Uls ter	Yes	No
UNWTD	***985***	***453***	***532***	***72***	***176***	***308***	***266***	***163***	***493***	***492***	***290***	***695***	***245***	***273***	***177***	***308***	***668***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Very likely	6	7	6	7	10	5	4	7	5	7	6	6	6	6	6	5	7
Fairly Likely	31	31	31	40	36	27	27	31	34	27	33	30	29	29	32	29	32
Not particularly likely	41	40	41	40	40	37	47	40	42	40	41	40	40	42	40	42	40
Not at all likely	22	23	22	13	14	31	22	22	19	26	20	23	25	23	22	24	22
- ANY Likely	**37**	**37**	**37**	**47**	**46**	**32**	**31**	**38**	**40**	**34**	**39**	**36**	**35**	**36**	**38**	**34**	**38**
- ANY Not Likely	**63**	**63**	**63**	**53**	**54**	**68**	**69**	**62**	**60**	**66**	**61**	**64**	**65**	**64**	**62**	**66**	**62**
Mean	**2.21**	**2.21**	**2.20**	**2.40**	**2.42**	**2.06**	**2.13**	**2.23**	**2.27**	**2.15**	**2.25**	**2.19**	**2.17**	**2.20**	**2.21**	**2.16**	**2.23**

Q.6a How likely are you to spend 15% more to buy organic food instead of non-organic food (ie such as fruit and vegetables, meat, etc)?

Likelihood of spending 10% more to buy organic instead of non-organic food

Base: All Grocery Shoppers - 985

Base : Shopper @ Q1	Total	Gender		Age					Social Class		Region					Kids in HHold	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Lein-ster	Mun-ster	Conn/Uls ter	Yes	No
UNWTD	*985*	*453*	*532*	*72*	*176*	*308*	*266*	*163*	*493*	*492*	*290*	*695*	*245*	*273*	*177*	*308*	*668*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Very likely	16	16	16	20	22	14	11	16	17	15	17	15	14	16	16	14	17
Fairly Likely	34	34	33	36	38	28	34	37	36	32	34	34	35	32	35	30	35
Not particularly likely	30	29	31	33	27	30	34	27	31	29	30	30	29	33	29	35	28
Not at all likely	20	21	20	12	12	28	20	20	16	24	19	21	23	20	19	21	20
- ANY Likely	**50**	**50**	**49**	**55**	**60**	**42**	**46**	**53**	**53**	**47**	**51**	**49**	**48**	**47**	**51**	**44**	**52**
- ANY Not Likely	**50**	**50**	**51**	**45**	**40**	**58**	**54**	**47**	**47**	**53**	**49**	**51**	**52**	**53**	**49**	**56**	**48**
Mean	**2.45**	**2.45**	**2.44**	**2.63**	**2.70**	**2.27**	**2.37**	**2.49**	**2.53**	**2.37**	**2.50**	**2.43**	**2.39**	**2.43**	**2.49**	**2.37**	**2.48**

Q.6b How likely are you to spend 10% more to buy organic food instead of non-organic food (ie such as fruit and vegetables, meat, etc)?

Likelihood of spending 5% more to buy organic instead of non-organic food

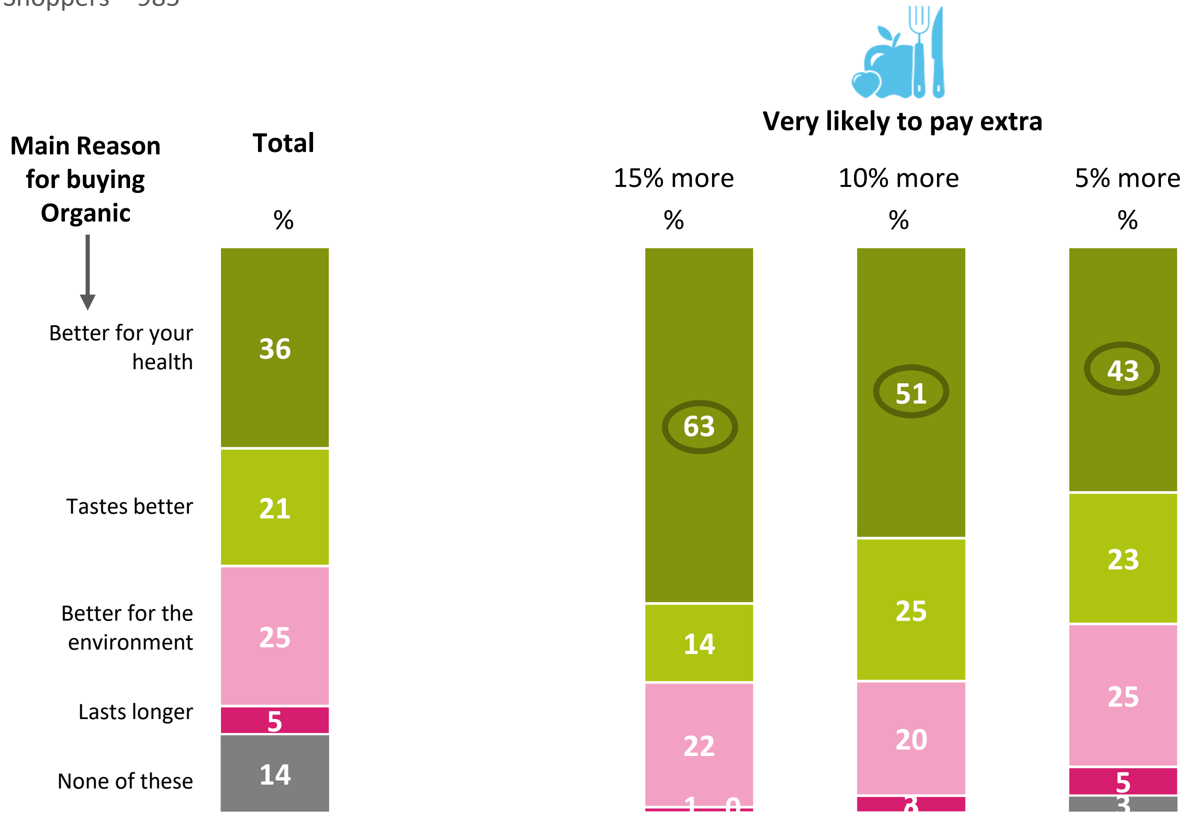
Base: All Grocery Shoppers - 985

	Total	Gender		Age					Social Class		Region					Kids in HHold	
		Male	Female	-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/ Ulster	Yes	No
UNWTD	*985*	*453*	*532*	*72*	*176*	*308*	*266*	*163*	*493*	*492*	*290*	*695*	*245*	*273*	*177*	*308*	*668*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Very likely	37	39	35	42	48	30	32	40	40	33	42	34	33	34	38	33	39
Fairly Likely	34	35	32	37	30	32	37	33	36	32	31	35	34	38	31	35	33
Not particularly likely	14	11	17	14	12	16	14	10	13	15	13	14	15	12	16	18	12
Not at all likely	16	15	17	7	10	21	17	17	12	20	14	17	18	16	15	14	17
- ANY Likely	**70**	**74**	**67**	**79**	**78**	**62**	**69**	**73**	**76**	**65**	**73**	**69**	**67**	**72**	**69**	**68**	**71**
- ANY Not Likely	**30**	**26**	**33**	**21**	**22**	**38**	**31**	**27**	**24**	**35**	**27**	**31**	**33**	**28**	**31**	**32**	**29**
Mean	**2.91**	**2.97**	**2.85**	**3.14**	**3.15**	**2.71**	**2.83**	**2.96**	**3.04**	**2.79**	**3.01**	**2.87**	**2.82**	**2.89**	**2.92**	**2.86**	**2.93**

Q.6c How likely are you to spend 5% more to buy organic food instead of non-organic food (ie such as fruit and vegetables, meat, etc)?

Those who indicated they will pay the most extra for organics cite ‘Health’ as the main reason for buying

Base: All Grocery Shoppers - 985



Q.4 Which of the following is the main reason for buying organic food?

Key findings

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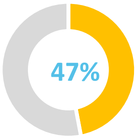
Key Finding

BORD BIA Thinking House

B&A

Organic has benefited to some extent with one quarter buying more since Covid. However **locally produced** trumps organic for **2 in 3 groups.**

Health is the main reason to buy organic food followed by '**better for the environment**' and '**taste**'. Note taste edges environment at the total level as a reason but ***health still No.1.***



Just under half are willing to **pay more** for organic food.

Although health is the No.1 reason for buying organic, only ***1 in 5 agree that organic food helps in the health defence against Covid.***

Only weekly **organic buyers** have a higher level of agreement that organic food helps in the **health defence against Covid** (34% vs 20% all grocery shoppers).

Those aged **under 35** and those from the **middle class** cohort are more likely to ***pay more for organic food.***

10% premium

Analysing just the very likely figure, 37% would be very likely to spend 5% more on organic, but only 16% would spend 16% more, while 6% would spend 15% more. Thus a **10% premium is probably the max price premium.**

Those who indicated they will pay the most extra for organics cite ***'Health'*** as the main reason for buying.

Thank you.

RESEARCH
& INSIGHT

BORD BIA
Thinking House

Milltown House
Mount Saint Annes
Milltown, Dublin 6 - D06 Y822
+353 1 205 7500 | www.banda.ie

Delve Deeper