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Organic Trade Association

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SINCE 1985
Organic
trade association



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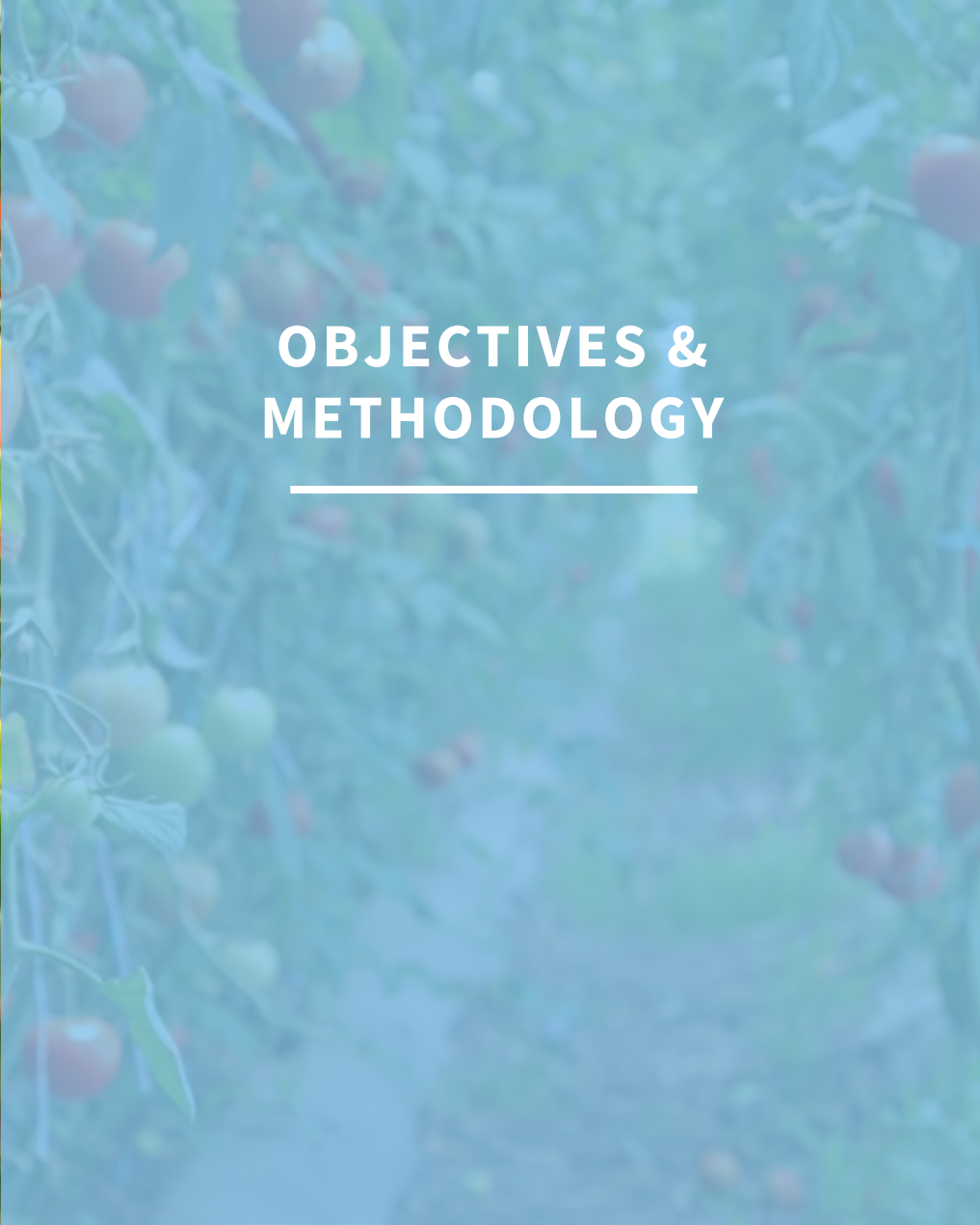
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OBJECTIVES & METHODOLOGY



RESEARCH OBJECTIVES



Identify potential risks to Trust in organics and understand how Trust in organic and challenges to organic integrity are perceived across diverse audiences



Identify the value that organic provides to the lives of a wide range of consumer audiences



Understand what sources of information key stakeholders use to gather information about organic products



Discover what expectations consumers have for organic products—and how these expectations differ from conventional products

METHODOLOGY

Edelman DXI fielded a 20-minute online survey from September to October, 2021 for a total of n=7,500 respondents* across 6 markets:

AUDIENCES	MARKETS	SAMPLE SIZE	MARGIN OF ERROR
Gen Pop	U.S	N=2,000	+/- 2.19%
	U.K.	N=500	+/- 4.38%
	France	N=500	+/- 4.38%
	Germany	N=500	+/- 4.38%
	Japan	N=1,000	+/- 3.1%
	UAE	N=500	+/- 4.38%
Food Forward	U.S.	N=1,000	+/- 3.1%
US Ethnicity Oversamples	U.S. Asian Americans	N=500	+/- 4.38%
	U.S. African-American	N=500	+/- 4.38%
	U.S. Hispanic	N=500	+/- 4.38%

The survey was conducted for 10 audiences across 6 markets with the following definitions:

Gen Pop: Adults, age 18+

Purpose: To uncover perceptions on the Organics industry as well as examine the factors that influence trust and buying habits.

US Food Forward: Adults, age 18+, *‘Food Forward’ consumers are defined as those who take action regarding news about the food and beverage industry and agreed with certain statements relating to their habits and beliefs.

Purpose: To provide insight into those more influential and attuned to news and information related to food production, nutrition and trends

US Oversamples: Ethnicity oversamples for US Asian Americans, African-American, and Hispanics audiences.

Purpose: To gain insight into target populations

Who Are the Food Forwards?

FOOD FORWARD DEFINITION

Enjoy Food and Share Their Knowledge

Respondents must indicate they ‘Strongly Agree’ with at least 3 statements from a set of answer options:

1. I enjoy trying different types of foods
2. People often ask my advice when it comes to food
3. I pay attention to the latest food trends
4. I consider myself a “foodie”
5. When I find a food product I like, I typically recommend it to people I know
6. I often share food information with my friends/family on social media or in-person

Take Action

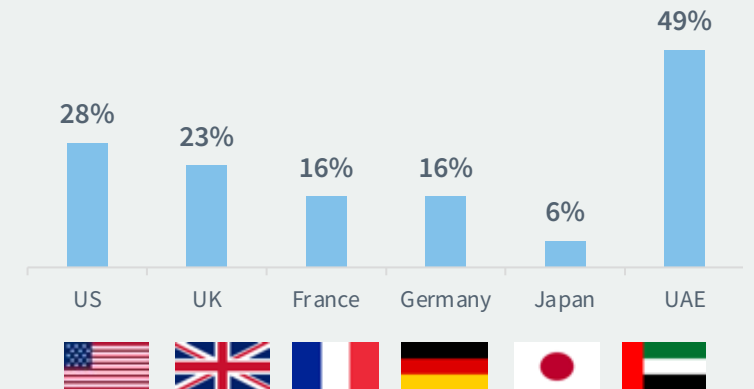
They must also indicate that they would take at least one of the following actions if they heard impactful news about a food and beverage brand:

1. Boycott/Stop buying the product
2. Support the company/buy more products
3. Talk about the news with family and friends
4. Post about the news on social media
5. Contact the company for more information
6. Write a letter to the editor of the newspaper
7. Sign a petition



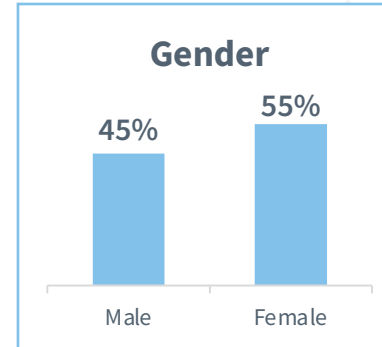
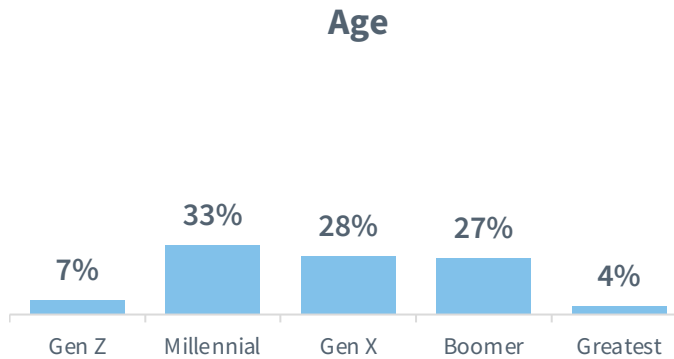
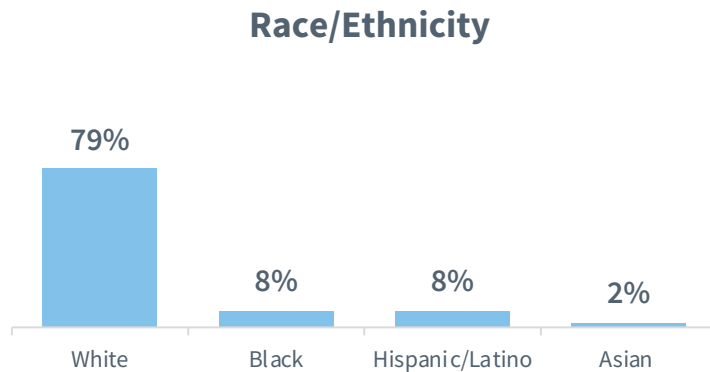
Roughly 1 in 4 (28%) respondents in the US are Food Forwards

% Food Forwards by Market

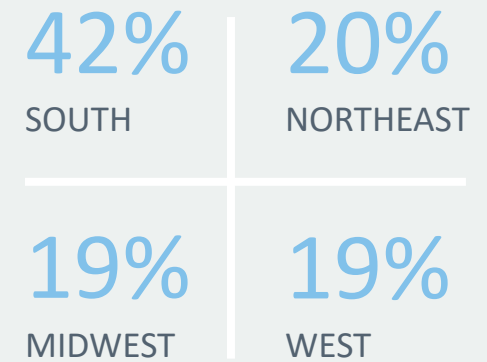


Who Are the Food Forwards?

In the United States, Food Forwards tend to be White, identify as female, live in the South and be in the Millennial to Boomer age range



US REGION

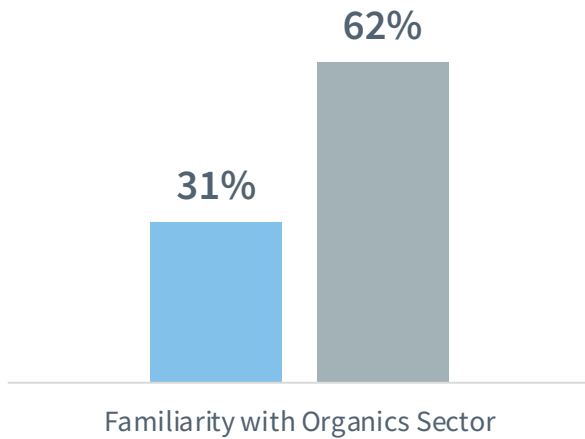


Why Are Food Forwards Important?

They Are More Familiar with Organics

Familiarity with Organics

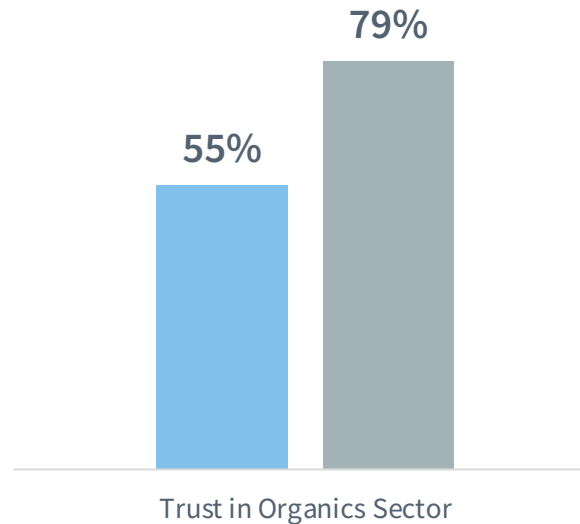
(Shown: % Top 2 Familiar)



They Are More Trusting of Organics

Trust in Organics

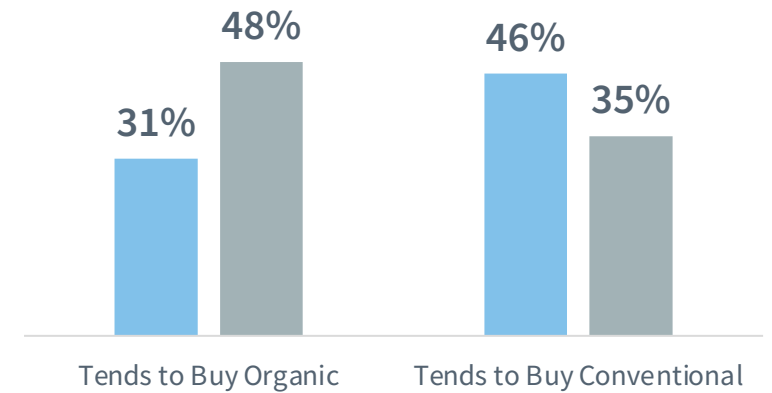
(Shown: % Top 3 Trust)



They Are More Likely to Purchase Organics

Purchases Organic or Conventional Products

(Shown: % Top 2 Buys Organic, Top 2 Buys Conventional)



■ US Gen Pop ■ US Food Forwards



EXECUTIVE SUMMARY



CORE NARRATIVE

1

There is widespread confusion about what it means to be organic.

2

The things people say they care about coincide with many of the elements of the organic standards.

3

Americans cite purchasing organic for reasons related to their health and the environment.

4

Trust in Organics is being held back by a lack of familiarity—Producers of raw materials are more trusted than manufacturers.

5

Consumers are using labels to make purchases—even when they are not verified in any way.

6

People are searching for a go to source—and they don't think it exists.

7

Consumers expect organic standards to keep pace with evolving knowledge about human and planetary health.

KEY FINDINGS

There is widespread confusion about what it means to be organic

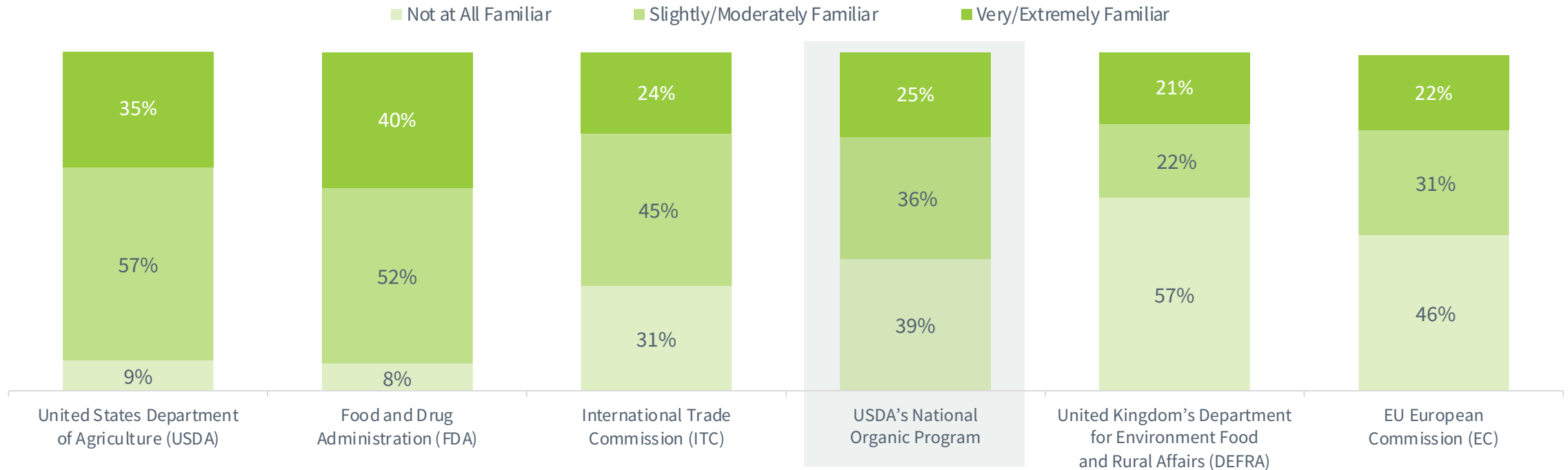
1



Americans Are Not Very Familiar with the USDA or the National Organic Program

Familiarity with Regulatory Bodies—US Gen Pop

(Shown: % Top 2 Familiar)

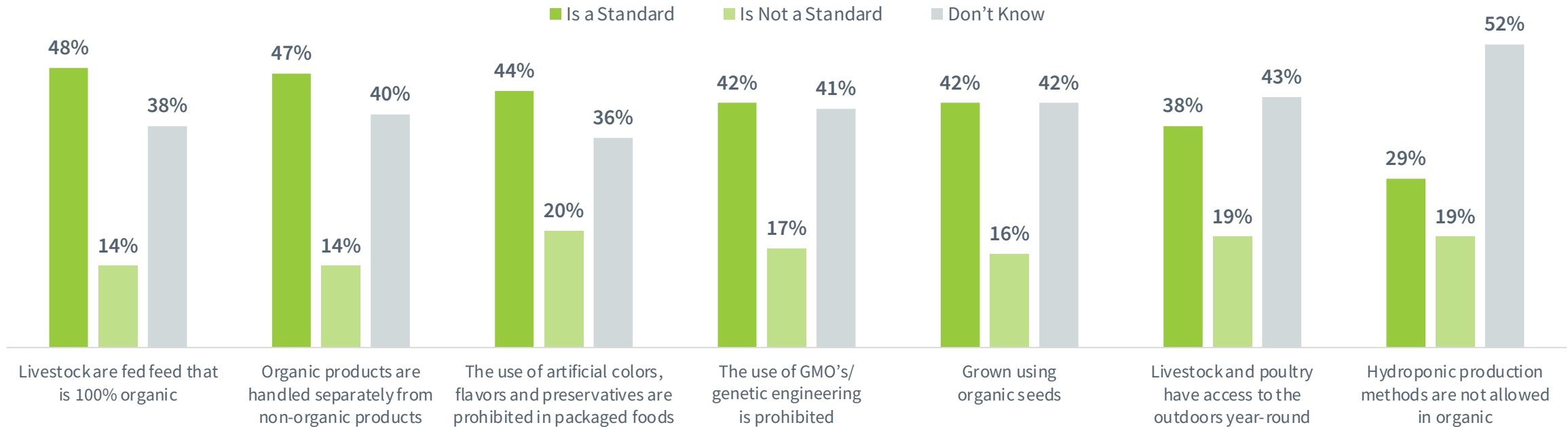


Q16: How familiar are you with the following organizations or regulatory bodies?
Base sizes: US Gen Pop n=2000

And Many Are Not Knowledgeable About Specific USDA Organic Standards

Knowledge About USDA Organic Standards—US Gen Pop

(Shown: % Selected Response)



Q27: To the best of your knowledge, which of the following are standards for a product to receive the USDA organic label?

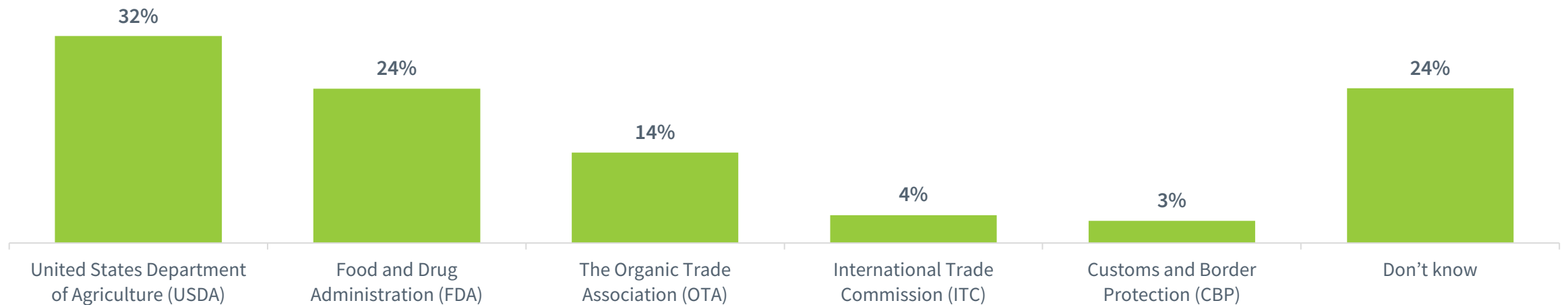
Base sizes: US Gen Pop n=2000



1 in 4 Don't Know Who is Responsible for Enforcing Organics—and Only a Third Cite the USDA

Regulatory Bodies Responsible for Enforcement—US Gen Pop

(Shown: % Selected Response)



Q19: Which of the following government or non-profit organizations do you believe is responsible for creating and enforcing organic standards in the United States?
Base sizes: US Gen Pop n=2000

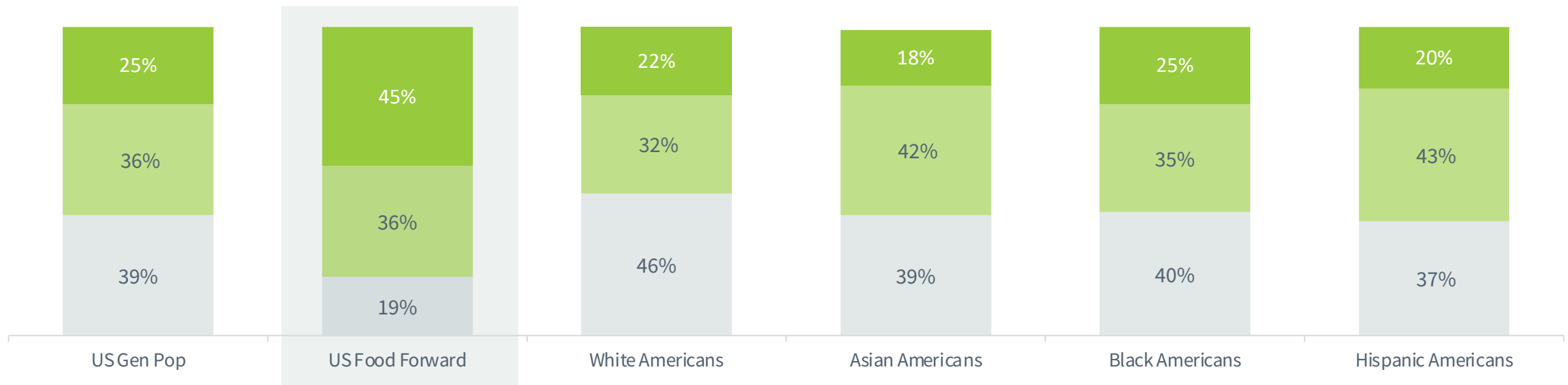
Familiarity the USDA's NOP is Equally Low Within Different Ethnic/Racial Groups

A majority of US Food Forwards are familiar with the program

Familiarity with the USDA's National Organic Program—US Audiences

(Shown: % Top 2 Familiar)

Very/Extremely Familiar Somewhat/Moderately Familiar Not at All Familiar



Q16: How familiar are you with the following organizations or regulatory bodies?

Base sizes: US Gen Pop n=2000, US Food Forward n=1001, Asian American n=500, Black Americans n=505, Hispanic Americans n=510



KEY FINDINGS

The things people care about most coincide with many of the elements of the organic standards

2



Americans Have Many of the Same Concerns That Are Core Values Addressed by the NOP

Concerns about the Food & Beverage Industry—US Gen Pop

(Shown: % Selected Response)

■ Somewhat Concerned ■ Very Concerned



Q4: Please rate how concerned you are about the following as it relates to the food & beverage industry.
Base sizes: US Gen Pop n=2000

Most Americans Believe Organic Products are Healthier, Have Less Pesticides, and Less GMOs Than Conventional Products

Perceptions About Organic Products—US Gen Pop

(Shown: % Top 2 Agree)



Q14: How much do you agree or disagree with the following statements about organic products?
Base sizes: US Gen Pop n=2000

Americans Think That Organic Practices Are Better for Farmers and Livestock

Perceptions About Organic Products—US Gen Pop

(Shown: % Top 2 Agree)



Q14: How much do you agree or disagree with the following statements about organic products?
Base sizes: US Gen Pop n=2000

KEY FINDINGS

Americans cite purchasing organic for reasons related to their health and the environment

3



Gaps Exist in Purchase Decisions of Organic and Conventional Products

Larger gaps exist for non-food products

Buys Organic or Conventional—US Gen Pop

(Shown: % Sometimes + Usually Buy Organics, Sometimes + Usually Buy Conventional)

■ Organic ■ Conventional



Q9: When considering purchasing the following products, do you tend to buy organic or conventional (i.e., not organic)?
Base sizes: US Gen Pop n=2000



Across International Markets, Consumers Say Environmental Impact is a Main Reason They Buy Organic Non-Food Items

Top Reasons for Buying Organic Fiber

(Shown: Top Ranked Reasons)



HEALTH
(25%)



ENVIRONMENTAL
IMPACT
(21%)



ENVIRONMENTAL
IMPACT
(38%)



ENVIRONMENTAL
IMPACT
(38%)



QUALITY
(31%)



ENVIRONMENTAL
IMPACT
(20%)

Q12: Which of the following is your primary reason for buying the selected organic products?
Base sizes: differ based on product

KEY FINDINGS

Trust is being held back by a lack of familiarity—producers of raw materials are more trusted than manufacturers

4

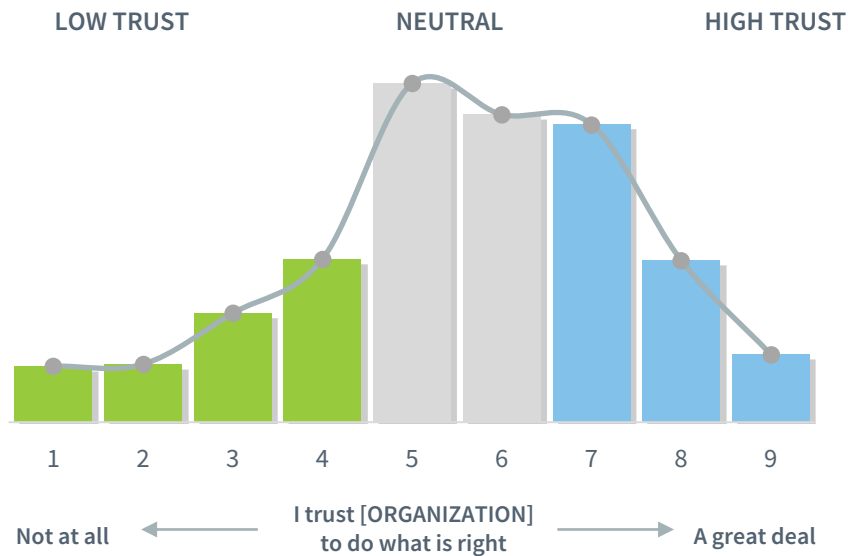


Understanding Edelman Net Trust Score (ENTS)

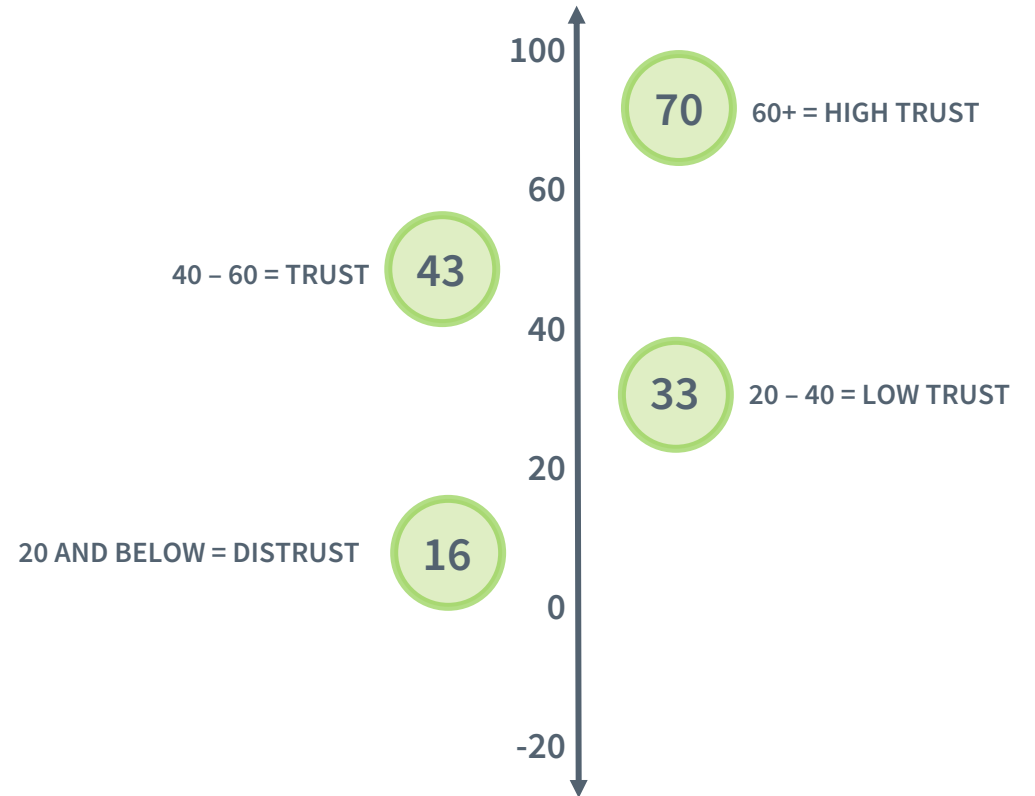
DEFINING ENTS

ENTS = High Trust – Low Trust

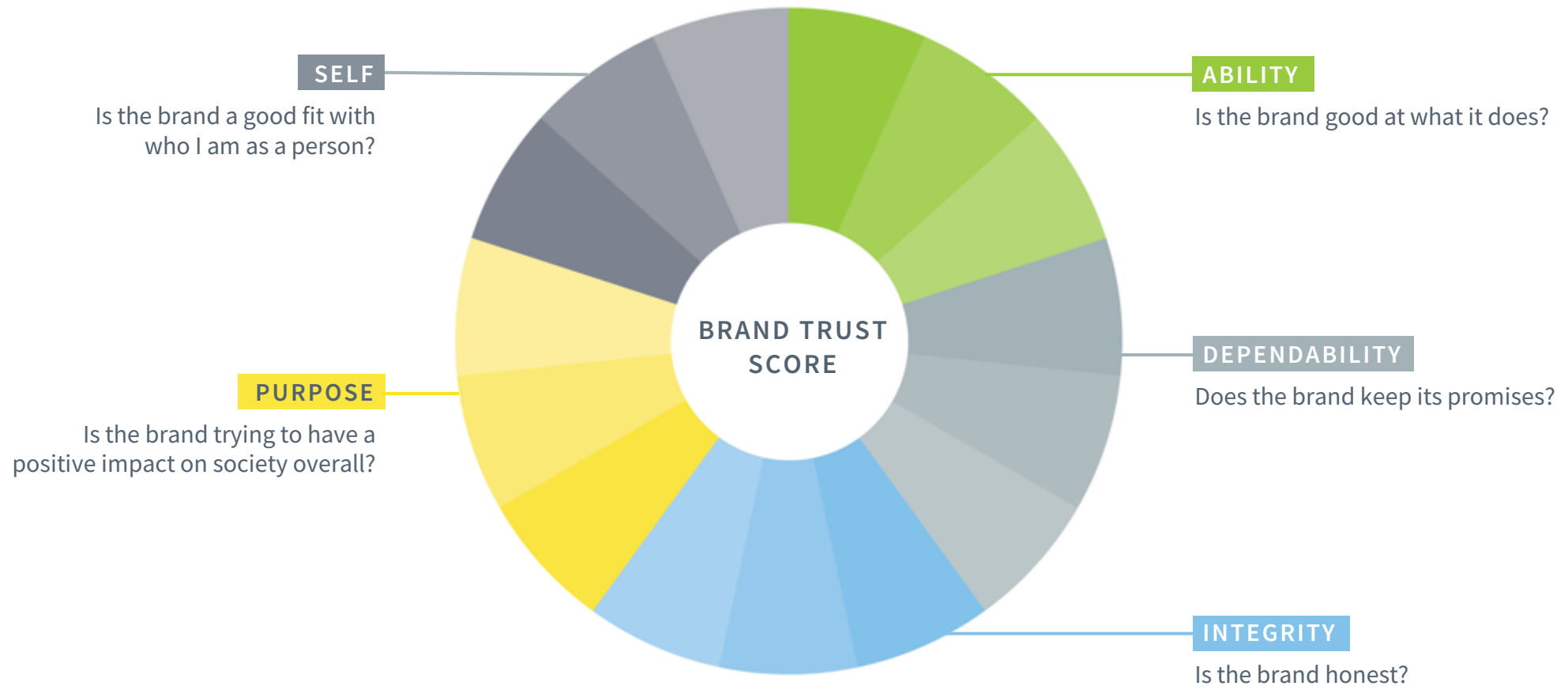
Based on overall trust:
“How much do you trust [ORGANIZATION] to do what is right?”



ENTS Score in Context – High + Low Scores*



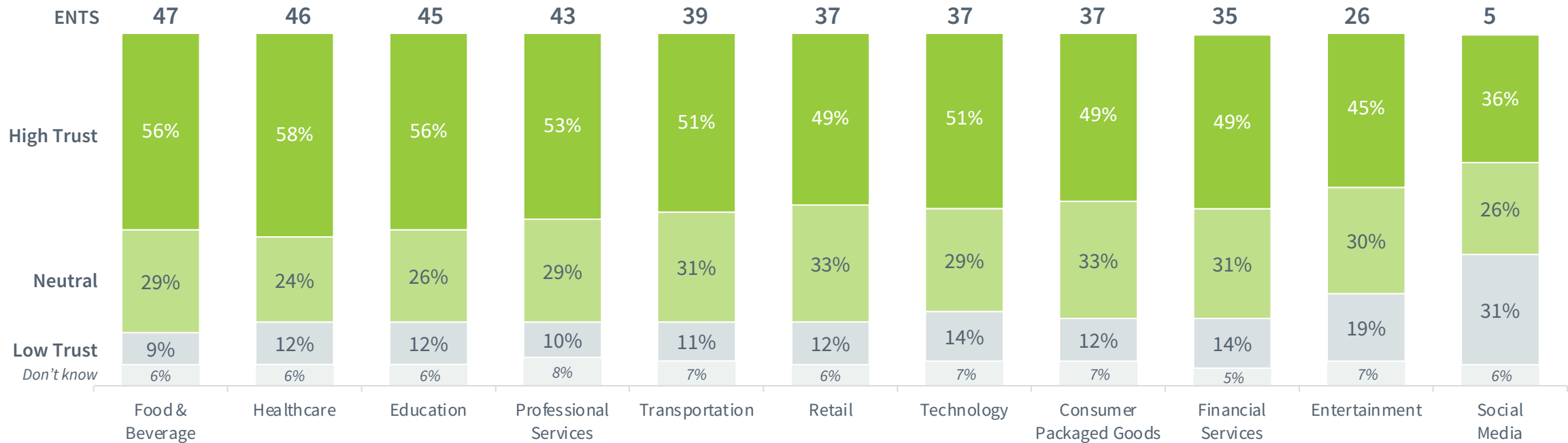
Trust Capital is Composed of Four Overarching Dimensions, Which Were Tested for USDA Organic Certification Program



Food and Beverages is Among the Most Trusted Industries in the United States

Trust in Industries—US Gen Pop

(Shown: % Selected)



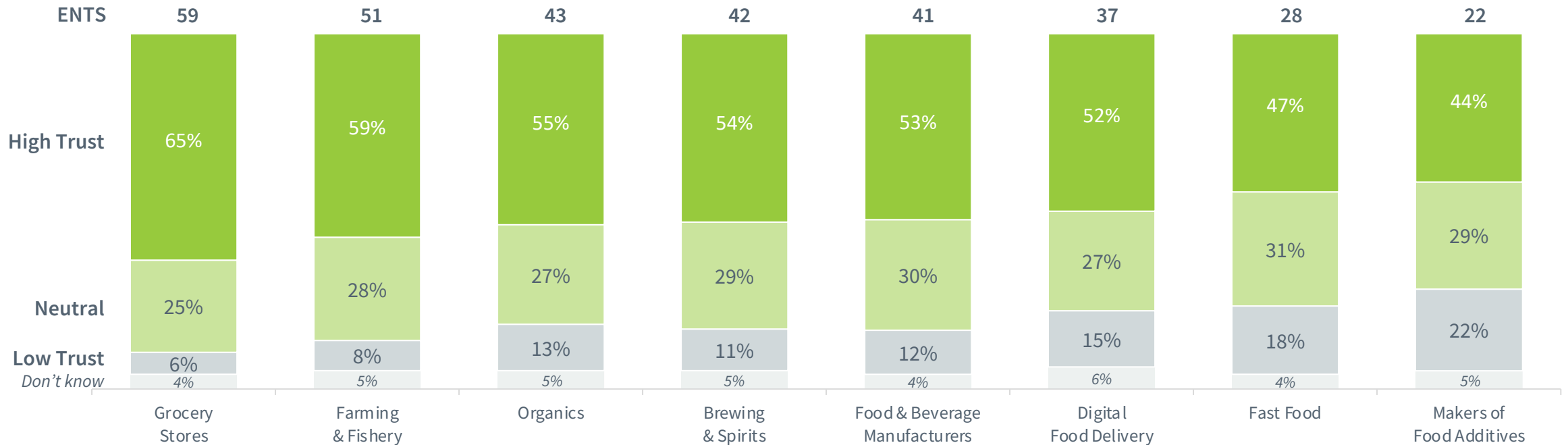
Q2: Please indicate how much you trust each of the following industries to do what is right. Please use a 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.

Base sizes: Varies by familiarity in industries and across audiences

Organics are Trusted But Not the Most Trusted Part of the Food and Beverages Industry

Trust in Food Sectors—US Gen Pop

(Shown: % Selected)



Q3: Thinking about these specific sectors within the food & beverage industry, please indicate how much you trust businesses in each of the following sectors to do what is right. Please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.

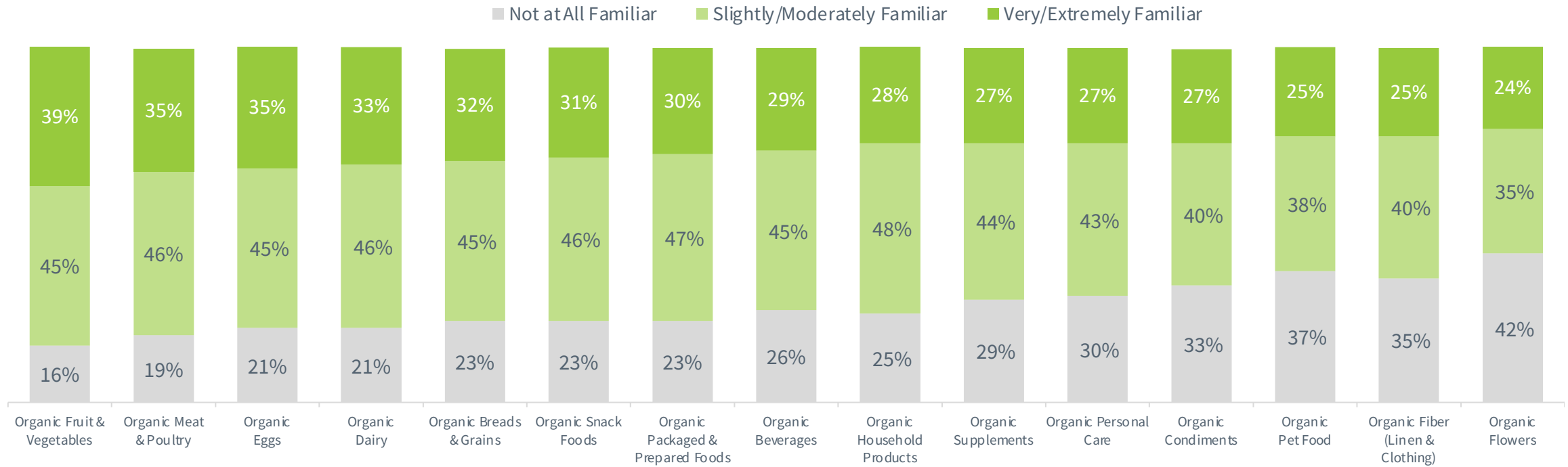
Base sizes: Varies by familiarity in product and across audiences



Americans Are Generally More Familiar with Organic Whole Foods Than Processed Products

Familiarity with Organic Products—US Gen Pop

(Shown: % Selected)



Q6: How familiar are you with the following organic products?

Base sizes: US Gen Pop n=2000



Food Forwards Are Significantly More Familiar with All Organic Products Compared to Gen Pop

Familiarity with Organic Products—US Audiences

(Shown: % Top 2 Very & Extremely Familiar)

	US GEN POP		US FOOD FORWARDS
Organic Fruit & Vegetables	39%	(+32)	71%
Organic Meat & Poultry	35%	(+29)	64%
Organic Eggs	35%	(+30)	65%
Organic Dairy	33%	(+30)	63%
Organic Breads & Grains	32%	(+31)	63%
Organic Snack Foods	31%	(+28)	59%
Organic Household Products	28%	(+29)	57%
Organic Supplements	27%	(+29)	56%

Q6: How familiar are you with the following organic products?
Base sizes: US Gen Pop n=2000, Food Forwards n=1001



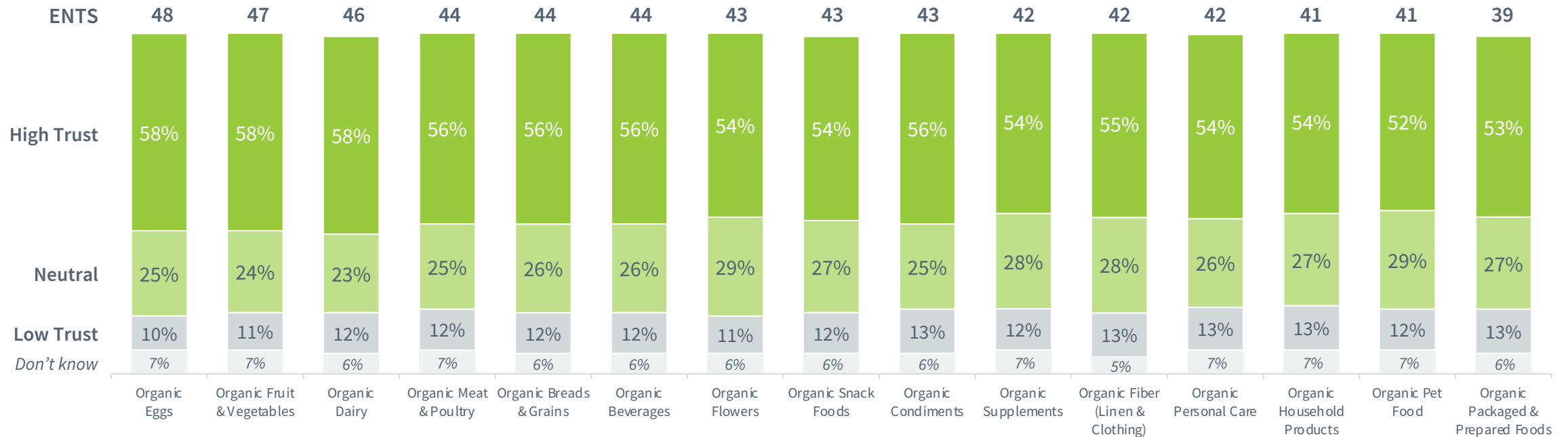
Produced by Edelman exclusively for Organic Trade Association, 2022

Organic Products Are Trusted, But a Quarter of the Us Population is Neutral About Them

Packaged and prepared foods are the least trusted of the organic products

Trust in Organic Products—US Gen Pop

(Shown: % Selected)



Q7. How much do you trust the following organic products? Please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.
Base sizes: Varies by familiarity in product

Black Americans Are Less Trusting of Certain Organic Products Than Gen Pop

Trust in Organic Products—US Audiences

(Shown: ENTS Score (High Trust—Low Trust))

	US GEN POP		BLACK AMERICANS
Organic Eggs	48	(-12)	36
Organic Dairy	46	(-8)	38
Organic Snack Foods	43	(-9)	34
Organic Condiments	43	(-10)	33
Organic Household Products	41	(-8)	33
Organic Pet Food	41	(-10)	31

Q7. How much do you trust the following organic products? Please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.

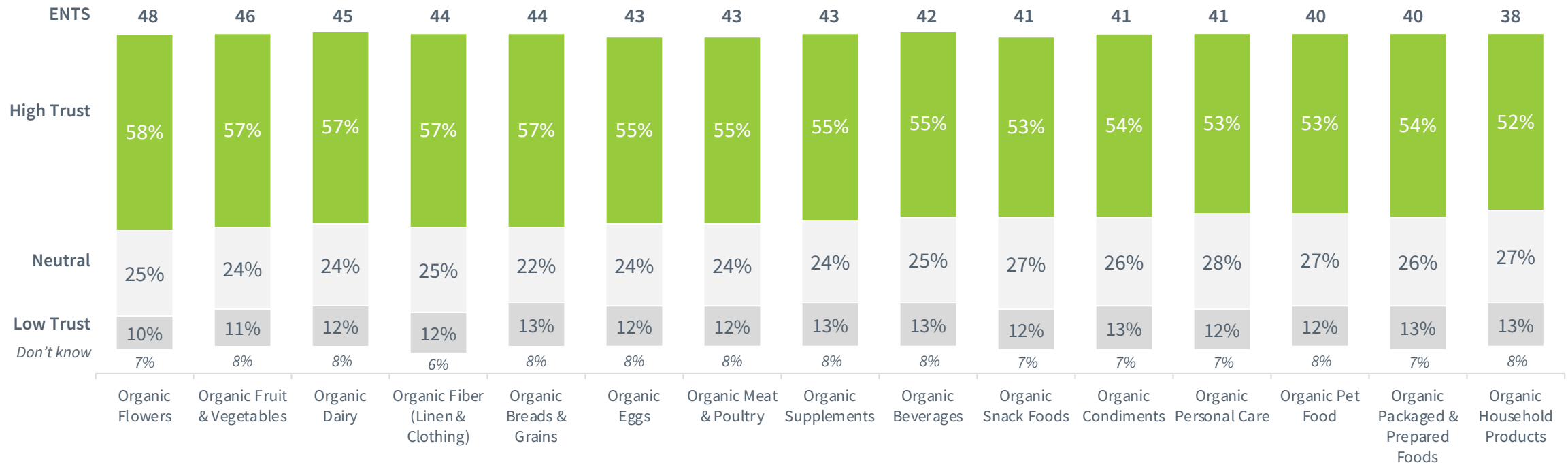
Base sizes: Varies by familiarity in product

Americans are More Trusting of Whole/Less-Processed Products

There is an opportunity for OTA to focus on converting people who feels neutrally

Trust in Organic Producers—US Gen Pop

(Shown: % Selected)



Q8: How much do you trust the producers of the following organic products to do what is right? Please use the same 9-point scale where one means that you “do not trust them at all” and nine means that you “trust them a great deal”.

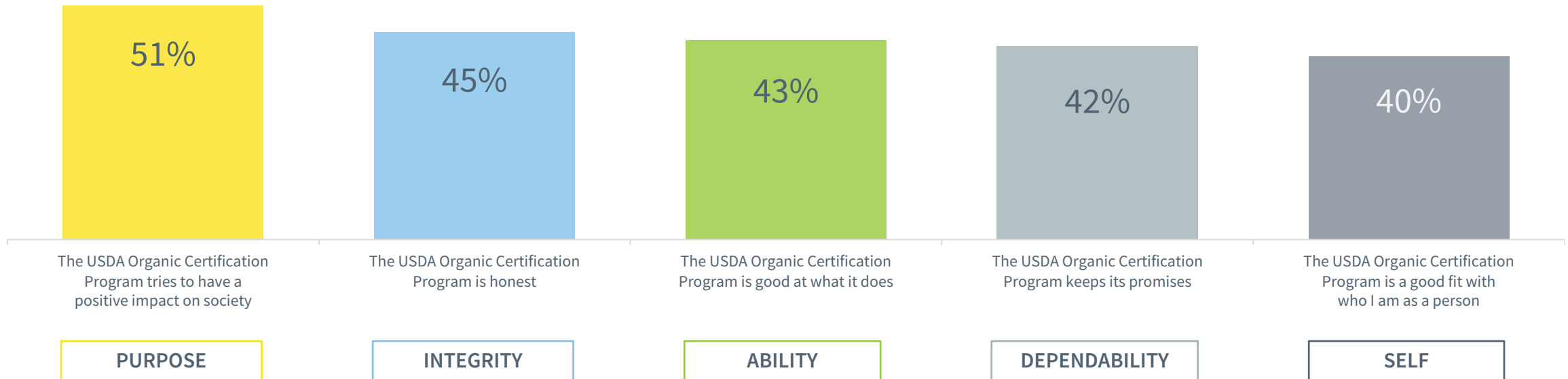
Base sizes: Varies by familiarity in product



There is Room for the USDA NOP to Improve on Core Trust Dimensions

Dimensions of Trust—US Gen Pop

(Shown: % Top 3 Agree)

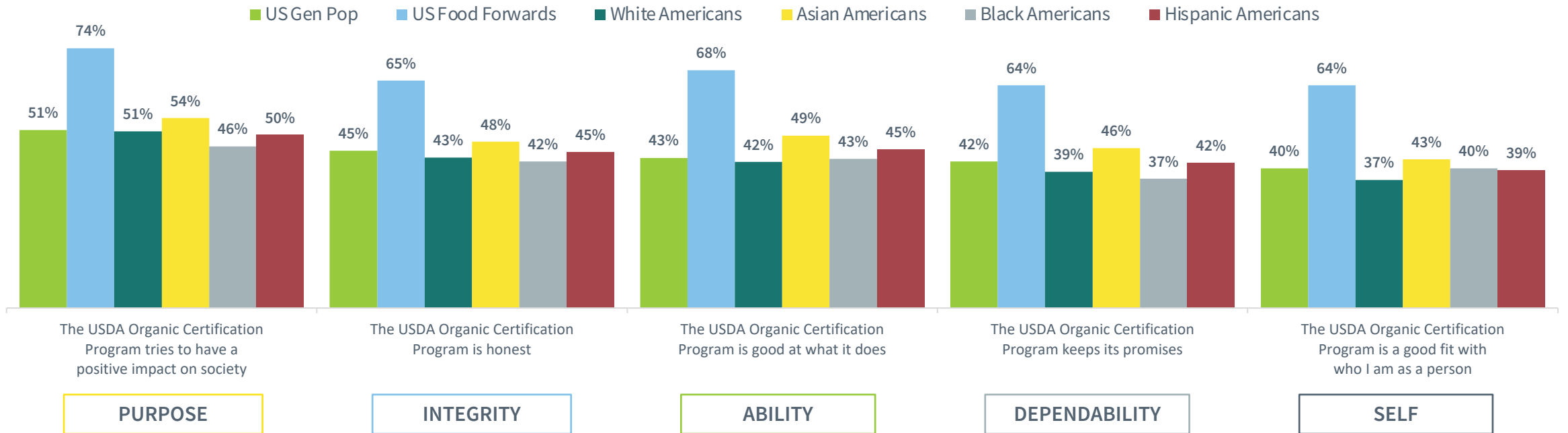


Q22: To what extent do you agree or disagree with the following statements?
Base sizes: US Gen Pop n=2000

Food Forwards Rate the USDA NOP Highly on All Dimensions

Dimensions of Trust—US Audiences

(% Top 3 Agree)



Q22: To what extent do you agree or disagree with the following statements?

Base sizes: US Gen Pop n=2000, US Food Forward n=1001, White Americans n= 1200, Asian Americans n=500, Black Americans n=505 Hispanic Americans n=510



KEY FINDINGS

Consumers are using labels to make purchases—even when they are not verified

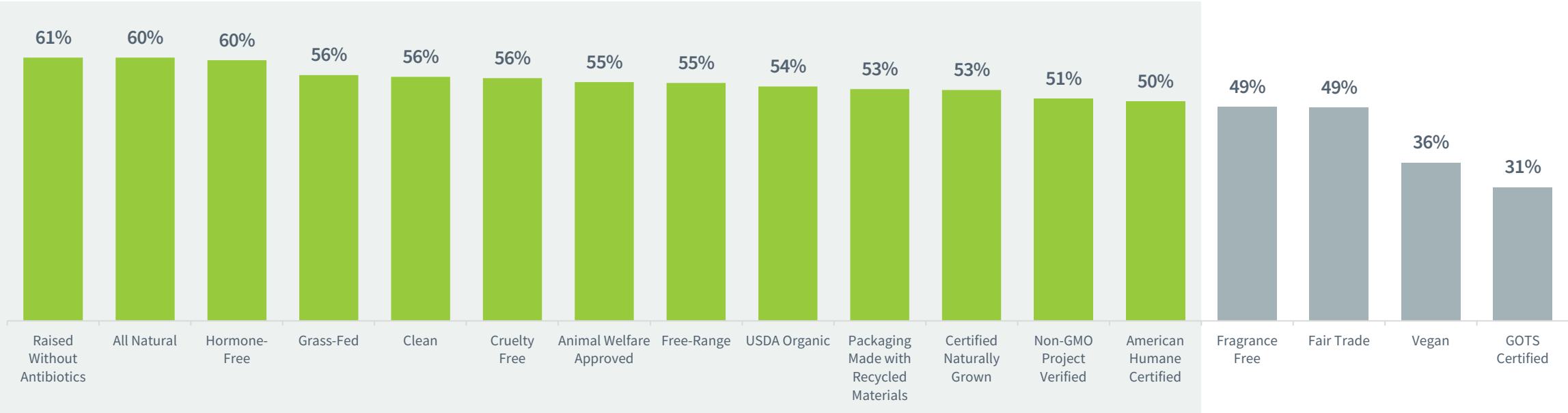
5



Labels Have an Impact on Purchase Decisions—and Most Americans Lack a Fundamental Understanding of What the USDA Organic Standard Means

Impact on Purchase Likelihood—US Gen Pop

(Shown: % Top 2 More Likely To Purchase)



Q23: Are you generally more or less likely to purchase products that have the following labels?
 Base sizes: US Gen Pop n=2000



Labels Have the Strongest Impact on Food Forwards

Impact on Purchase Likelihood—US Audiences

(Shown: % Top 2 More Likely To Purchase)

	US GEN POP		FOOD FORWARDS
Raised Without Antibiotics	61%	(+19)	80%
All Natural	60%	(+22)	82%
Clean	56%	(+20)	76%
Cruelty Free	56%	(+24)	80%
Animal Welfare Approved	55%	(+22)	77%
Free-Range	55%	(+24)	79%
USDA Organic	54%	(+23)	77%
Non-GMO Project Verified	51%	(+24)	75%

Q23: Are you generally more or less likely to purchase products that have the following labels?

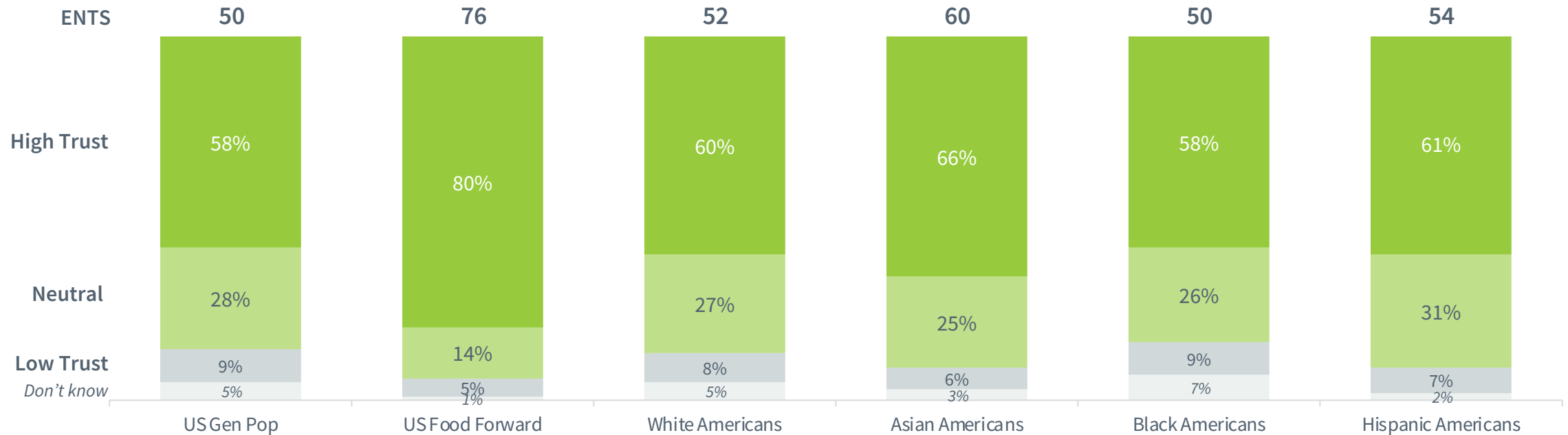
Base sizes: US Gen Pop n=2000, US Food Forward n=1001



Food Forwards Are Also Significantly More Trusting of the USDA Organic Label



Trust in USDA Organic Label—US Audiences
(Shown: % Selected)



Q25: How much do you trust the USDA Organic Label?

Base sizes: Familiar USDA Organic Label US Gen Pop n=1602, US Food Forward n=943, Asian Americans n=424, Black Americans n=424, Hispanic Americans n=438



KEY FINDINGS

People are searching for a go to source—and they don't think it exists

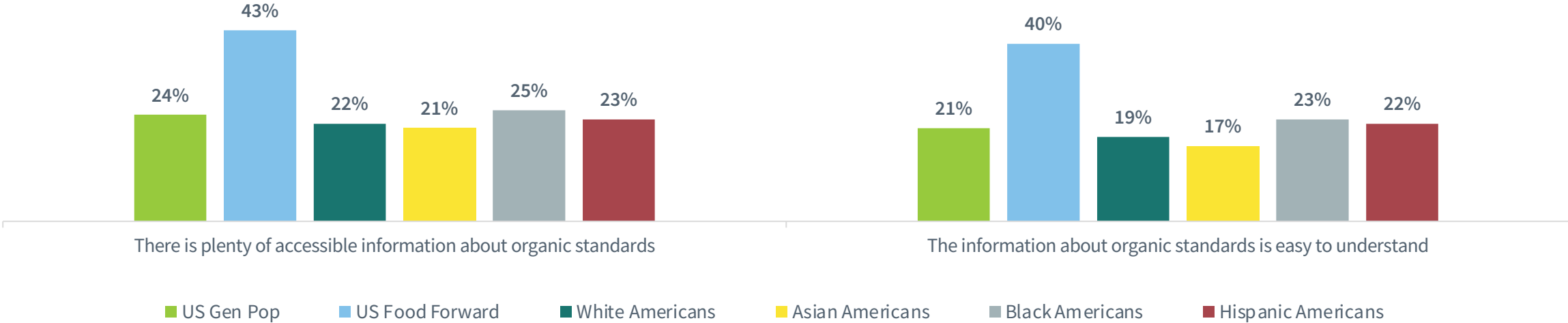
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Only a Quarter of Americans Strongly Believe There is Enough Accessible, Easy to Understand Information About Organics Out There

Perceptions of Organic Products and Standards—US Audiences

(Shown: % Top 1 Strongly Agree)

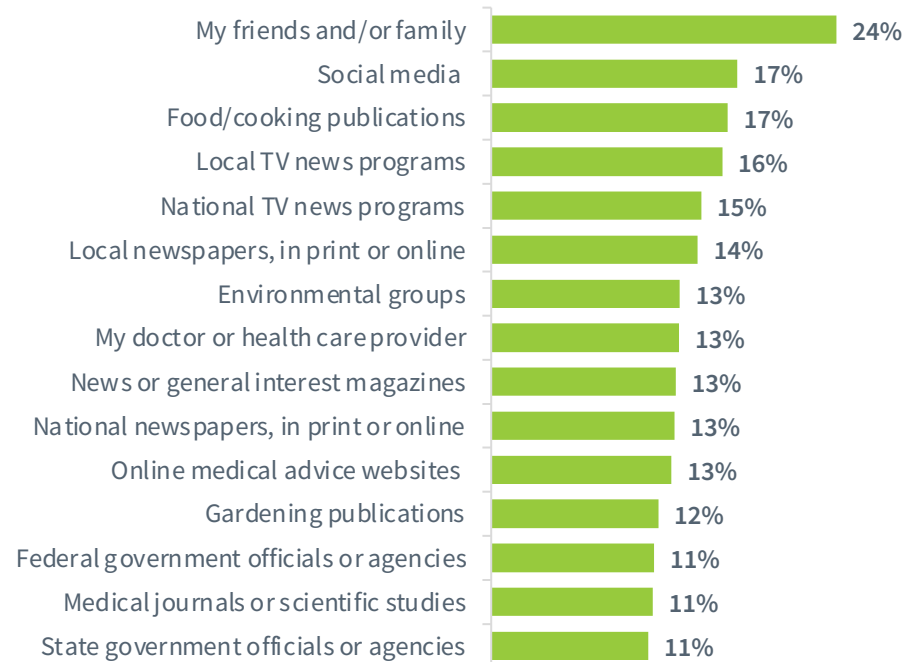


Q30: To what extent do you agree or disagree with the following statements about organics?
 Base sizes: US Gen Pop n=2000, US Food Forward n=1001, White Americans n=1200, Asian Americans n=500, Black Americans n=505 Hispanic Americans n=510

There is Not One Dominant Source of Information About Organic Products for Americans to Turn to

Sources of Information About Organic Products—US Gen Pop

(Shown: % Selected Response—Shown Top 15)



Q31: Which of the following sources do you use to get information about organic products?

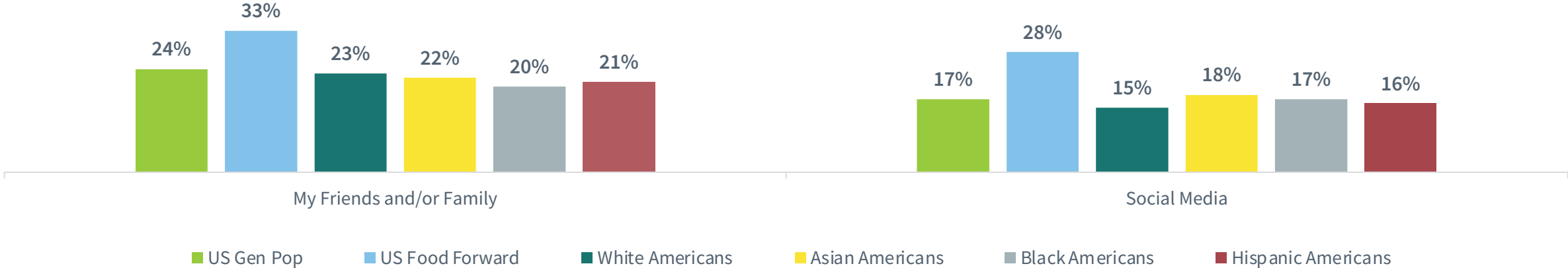
Base sizes: US Gen Pop n=2000



Food Forwards Are More Likely to Turn to Friends and Family for Information About Organic Products

Sources of Information About Organic Products—US Audiences

(Shown: % Selected Response—Shown Top 15)



Q31: Which of the following sources do you use to get information about organic products?
 Base sizes: US Gen Pop n=2000, US Food Forward n=1001, US White Americans n= 1200, Asian Americans n=500, Black Americans n=505, Hispanic Americans n=510



KEY FINDINGS

Consumers expect organic standards to keep pace with evolving knowledge about human and planetary health.

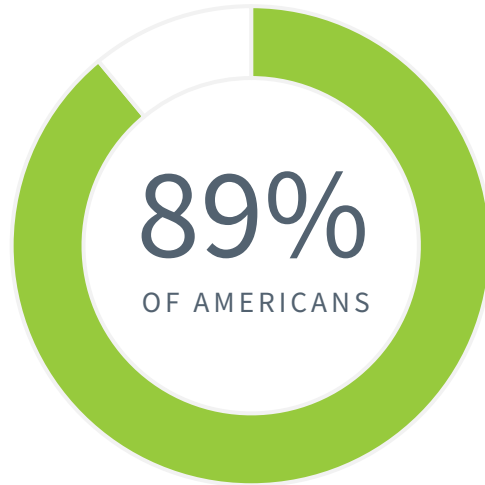
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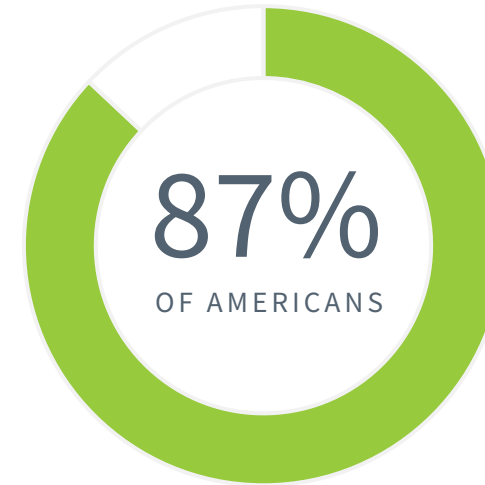
Americans' Expectation is That the Organic Standards are Regularly Updated to Reflect Evolving Knowledge About Human and Planetary Health

Perceptions of Government Oversight of Organics Industry—US Gen Pop

(Shown: % Top 2 Agree)



Say that the USDA should review and **update the organic standards** periodically



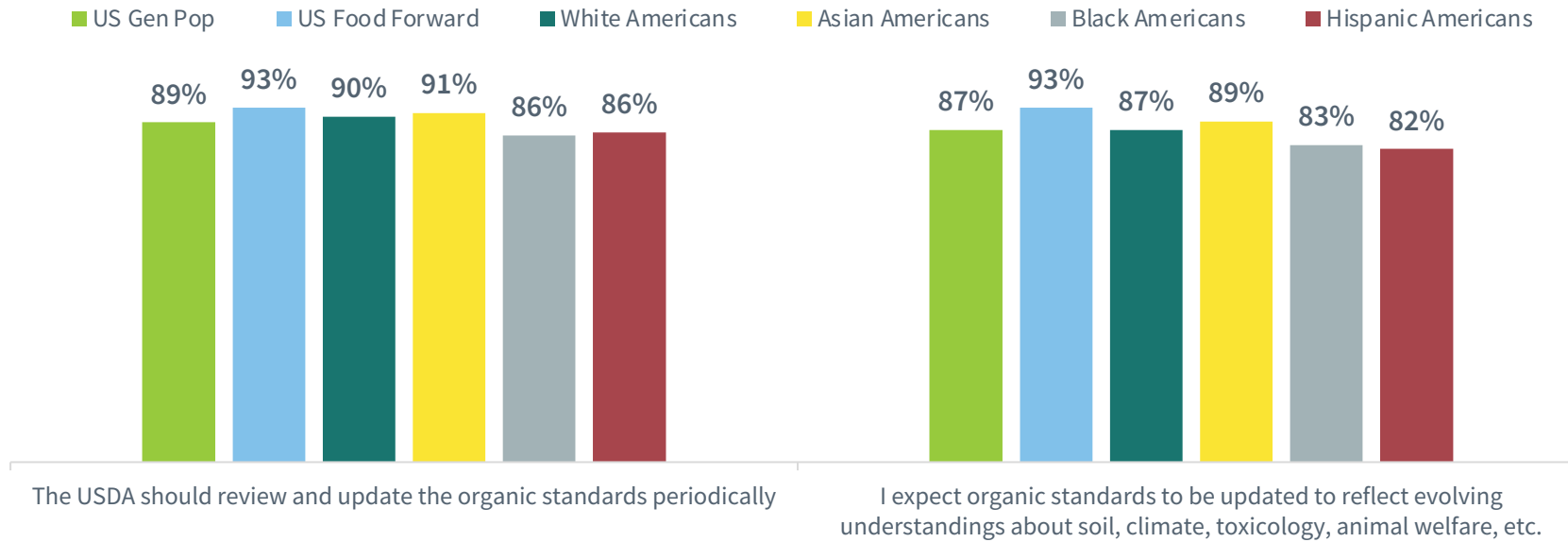
Expect organic standards to be updated to **reflect evolving understandings** about soil, climate, toxicology, animal welfare, etc.

Q15: To what extent do you agree or disagree with the following statements regarding government oversight of the organics industry?
Base sizes: US Gen Pop n=2000

This Sentiment is Shared Across Our US Audiences

Perceptions of Government Oversight of Organics Industry—US Audiences

(Shown: % Top 2 Agree)



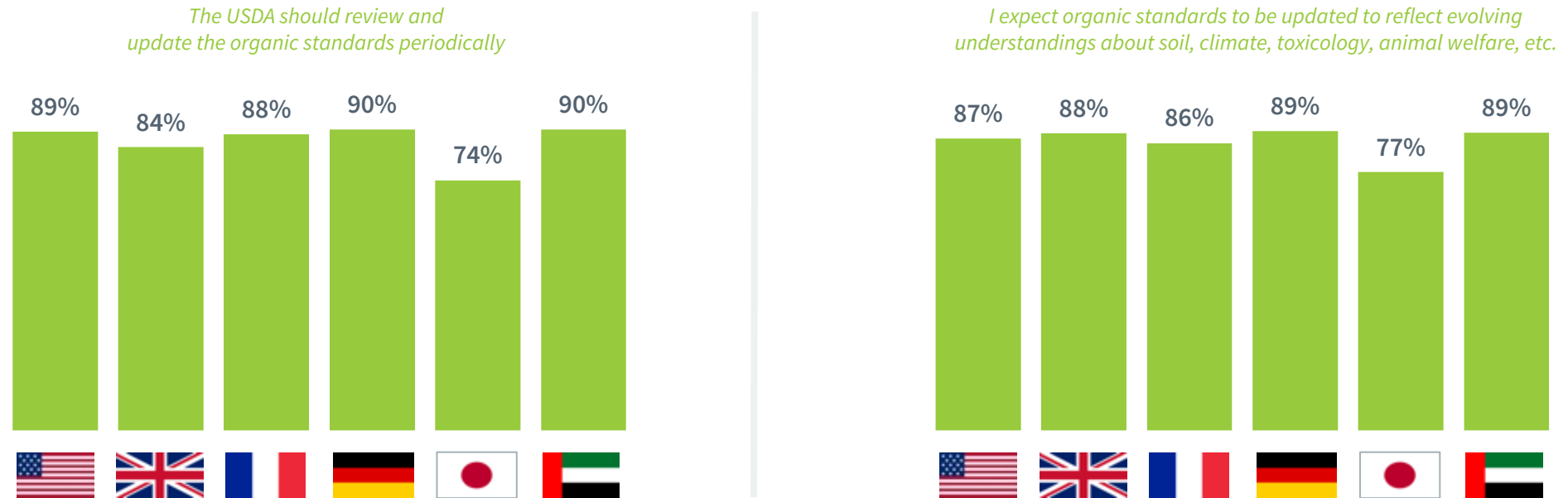
Q15: To what extent do you agree or disagree with the following statements regarding government oversight of the organics industry?

Base sizes: US Gen Pop n=2000, US Food Forward n=1001, US White Americans n= 1200, Asian Americans n=500, Black Americans n=505, Hispanic Americans n=510

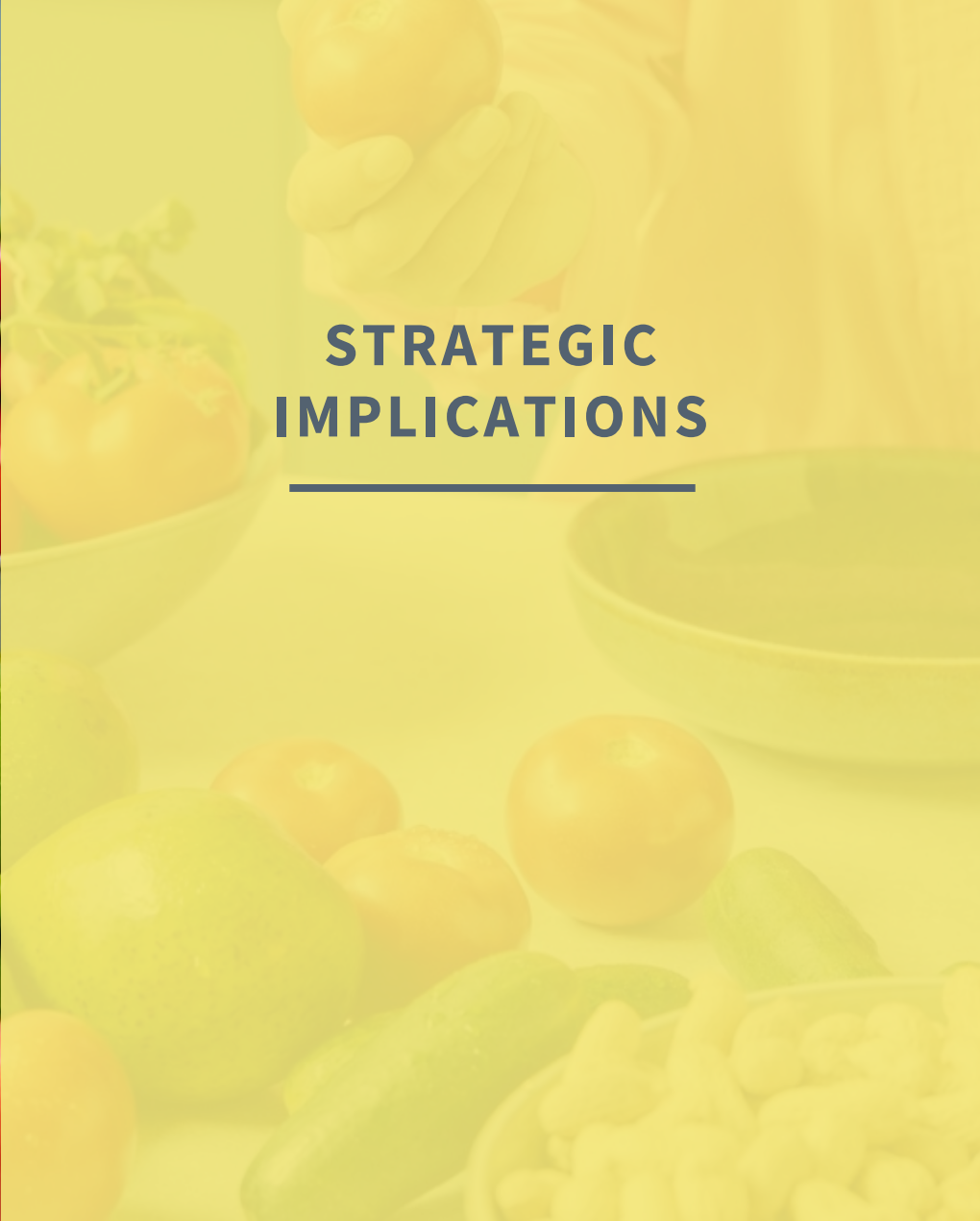
And International Markets

Perceptions of Government Oversight of Organics Industry—International Markets

(Shown: % Top 2 Agree)



Q15: To what extent do you agree or disagree with the following statements regarding government oversight of the organics industry?
Base sizes: US Pop n=2000, UK n=500, France n=500, Germany n=500, Japan n=1000, UAE n=500



STRATEGIC IMPLICATIONS



There is work to do for the USDA Organic Label to become the label people look for



As science tells us more about nutrition, practices, and climate, organics will need to continue to evolve



As new labels like regenerative surge, organic needs to make it known that it is at the foundation



There is an opportunity for the industry to establish a go-to source for information.



Produced exclusively for Organic Trade Association.

Organic Trade Association (OTA) members include growers, processors, certifiers, farmers associations, distributors, importers, exporters, consultants, retailers, and others involved in organic sector.

OTA members work together through networking, advocacy, and other initiatives to encourage and protect organic farming practices, and to share messages about the positive environmental and nutritional attributes of organic products with consumers, the media, and policymakers.

Questions about membership?

Visit ota.com/membership to learn more.