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## Organic Food

Prepared for  
Andre Leu  
Chair  
ORGANIC FEDERATION OF AUSTRALIA  
PO Box 800  
MOSSMAN QLD 4873

Level 5  
Newspoll House  
407 Elizabeth Street  
Surry Hills NSW 2010  
Tel (02) 9921 1000  
Fax (02) 9212 5880  
[newspoll@newspoll.com.au](mailto:newspoll@newspoll.com.au)

Level 3  
126 Wellington Parade  
East Melbourne VIC 3002  
Tel (03) 9416 4100  
Fax (03) 9417 1800  
[newspoll.melb@newspoll.com.au](mailto:newspoll.melb@newspoll.com.au)

27 Torrens Street  
Braddon ACT 2612  
Tel (02) 6249 8706  
Fax (02) 6247 4359  
[newspoll.canb@newspoll.com.au](mailto:newspoll.canb@newspoll.com.au)



# Table of contents

1.	Background and objectives	3
2.	Methodology	4
3.	Summary of main findings	5
4.	Summary charts	
	- Frequency buy organic foods	11
	- Symbols seen on food packaging	12
	- Number of symbols seen on food packaging	13
	- Awareness of symbol meaning	14
	- Awareness of independent testing of organic foods	16
	- Preferred certification system	17
	- Reasons prefer to change to one, new certification symbol for all testing organisations	18
	- Reasons prefer to continue with the different certification symbols for each testing organisation	19
	- Rating of current certification system	20
5.	Questionnaire	21

# 1. Background and objectives

- In Australia, a food producer who markets organic foods can pay a fee to have their foods checked by one of eight independent testing organisations to verify that their foods are genuinely organic. Each of these eight independent testing organisations has its own certification symbol, which is shown on the label or package of foods they have verified as being genuinely organic.
  
- The objectives of this research were to investigate consumer opinion about the current certification system for organic foods, specifically:
  - consumer awareness and understanding of the different certification logos / symbols used by each testing organisation;
  - consumer preference for retaining the current eight-symbol system vs moving to a new system of one certification symbol to be used by *all* testing organisations; and,
  - whether consumers find the current system of multiple logos / symbols for certified organic foods confusing.

## 2. Methodology

### ***Sample***

- Conducted nationally among 966 main grocery buyers aged 18 years and over.
- Respondents were drawn from the online consumer panel managed by Lightspeed Research, Newspoll's online partner. Sample quotas were set for each state, city and regional area, by sex and age, and respondents were invited to participate in the survey, subject to a pre-screening process.

### ***Interviewing***

- Conducted over the period 16-19 October 2008.

### ***Weighting***

- To help reflect the overall population distribution, results were post-weighted to Australian Bureau of Statistics data on age, highest level of schooling completed, sex and area.

### 3. Summary of main findings

#### **Overview of key results**

There is low consumer awareness and understanding of the current certification symbols for organic foods. On average, regular organic food buyers recognise only 1.1 of the nine symbols – and half these buyers do not recognise any.

Even for the most widely recognised symbol, NASAA, which includes the words “Certified Organic”, only a minority of regular buyers (28%) recall seeing it on food packaging *and* claim to have known it means “Certified Organic”. For the other eight symbols tested, very few regular buyers (less than 5%) recognise these symbols and associate them with “Certified Organic” goods. This points to the simple learning that a symbol actually “saying” what it means can be helpful for shoppers and for improving consumer understanding of a symbol’s meaning.

In the marketplace, too few regular organic food buyers recognise and understand the current symbols to be feeling burdened with a sense of “confusion”. However, when the current system and symbols *are explained to them*, the vast majority (72%) do say they would prefer to *change* to *one, new* certification symbol used by all testing organisations - and when asked for their reasons, most say (unprompted) that this option is easier, clearer, less confusing. Few (14%) would prefer to *continue* with *different* certification symbols depending on the testing organisation.

Similarly, when asked to rate the current system of eight different certification symbols on a scale from 0 to 10 - where 0 is “very *confusing* and *hard* to identify organic foods” and 10 is “very *clear* and *simple* to identify organic foods” – on average, regular organic food buyers rate it more toward being confusing/hard, at only 3.1 out of 10.

### 3. Summary of main findings (*....cont*)

#### *Frequency buy organic foods*

- Six in ten (61%) Australian grocery buyers claim to ever buy some type of organic food. Around one in three (35%) claim to buy **at least once a month**, and 13% at least **once a week**. Most of these organic shoppers say they buy **packaged** organic foods at least sometimes – 56% ever buy, 28% at least once a month and 7% at least once a week. (Fig 1)

#### *Awareness of organic certification symbols*












- Around 30% of grocery buyers claim to have seen at least one of the above nine certification symbols on food packaging. Among regular organic food buyers (i.e. those who buy at least once a month), 50% recognise at least one of the symbols. (Fig 2)
- By far, the most widely known is the **National Association for Sustainable Agriculture (NASAA)** symbol – recognised by 21% of grocery buyers and 36% of regular organic food buyers. This is followed by:
  - the **National Certifying Mark for Australian Organic Goods**, recognised by 11% of grocery buyers and 19% of regular organic food buyers; and,
  - the **Australian Certified Organic (ACO)** and **AUS-QUAL** symbols, recognised by 8%, 7% of grocery buyers and 15%, 11% of regular organic food buyers, respectively.
- Beyond that, even among regular organic food buyers, recognition of the remaining five symbols is very low, ranging between only 4% and 7%. (Fig 2)
- All of this can be summarised with the simple statistic that the average grocery buyer recognises only 0.6 out of the nine symbols – and even the average regular buyer of packaged organic food recognises only 1.3 of the nine symbols. (Fig 3)

### 3. Summary of main findings (....cont)

**Understanding of what the symbols mean**

- To test understanding of what each symbol represents, survey respondents were asked, for each symbol they recognised, which one of the following best described what the symbol means:
  - Certified Australian produce
  - Certified Organic
  - Certified 100% Natural
  - Certified Bio-dynamic
  - Some other meaning
  - Can't say
  
- About three-quarters of those who recognise the **NASAA** symbol, correctly believe it represents “Certified Organic”. However this translates into only 16% of all grocery buyers (and 28% of regular organic food buyers), who **both** (i) recognise the symbol **and** (ii) know what it means. (Fig 4a/b)
  
- For each of the remaining symbols, only a very small percentage, even among regular organic food buyers, recognise the symbol *and* believe it refers to either “Certified Organic” or “Certified Bio-dynamic”. (Fig 4b)

*% Regular organic food buyers recognise symbol and believe it means “Certified Organic” / “Certified Bio-dynamic”*

									
Certified Organic	28%	1%	4%	1%	1%	2%	1%	1%	1%
Certified Bio-dynamic	1%	-	2%	1%	1%	2%	-	1%	1%

### 3. Summary of main findings (*....cont*)

#### *Awareness of independent testing of organic foods*

- Around half (48%) of regular organic food buyers claim to be aware there are accredited organisations that do independent testing of organic foods to verify they are genuinely organic. Awareness is higher among regular buyers of packaged organic foods (54%) and those who have seen any of the certification symbols on food packaging (64%). (Fig 5)
- However, given the aforementioned results, it's clear this awareness of independent testing is not always based on awareness and understanding of the certification symbols themselves.

#### *Preferred certification system*

- Having had the symbols and their meaning explained to them, a vast majority (72%) of regular organic food buyers say they would prefer to **change** the system to have **one, new** certification symbol used by **all** testing organisations, compared with only 14% who prefer to **continue** to show **different** certification symbols depending on which of the eight independent organisations does the testing. Preference for change is also at seven in ten among regular buyers of *packaged* organic foods (70%) and those who have seen any of the certification symbols on food packaging (74%). (Fig 6a)
- The (unprompted) reasons shoppers cite for their preferences are:
  - *For changing to a single symbol:* Changing to one, new certification symbol for all testing organisations is generally viewed as easier, clearer and less confusing. Having one symbol is also viewed as being easier to recognise and remember, and as having a clearer and stronger meaning. Some also see it as providing confirmation of uniformity in testing procedures across the testing organisations. (Fig 6b)
  - *For staying with the current system:* Being able to identify the particular organisation responsible for the testing is a reason some would prefer to continue with the current system. Some believe this would make testing organisations more accountable, for example, in the event of a problem or questions about a particular certified product. There is also a belief that different testers may currently have different procedures and standards. (Fig 6c)

### 3. Summary of main findings (*....cont*)

#### *Rating the current system – clear and simple, or confusing?*

- Having given their preference for changing the system vs maintaining the status quo, regular organic food buyers were asked to rate the current system of having eight different certification symbols as a way of helping people to identify genuine organic foods – on a scale from 0 to 10, where 0 is “very **confusing** and **hard** to identify organic foods” and 10 is “very **clear** and **simple** to identify organic foods”. Their average rating was only 3.1 out of 10. Average ratings were at a similar level for regular buyers of packaged organic foods (3.2) and those who have seen any of the certification symbols on food packaging (3.5). (Fig 7)

#### *Conclusions*

- Although for every one of the certification symbols, there are shoppers who recognise it and understand its meaning, the fact is that it is only a small number of organic food buyers who do so. Even for the most widely recognised NASAA symbol, it is only a significant minority of regular organic buyers (28%) who know and understand the symbol.
- It’s entirely conceivable that even this number is inflated. This is because the symbol includes the words “Certified Organic”, making it somewhat easier for survey respondents to guess the symbol’s meaning (even though they were asked to nominate the meaning “based on what you know”, rather than by guessing). Still, even if the result is inflated because of this, it points to the simple learning that a symbol actually “saying” what it means is extremely helpful for shoppers, and also for improving understanding of a symbol’s meaning among consumers.
- It’s clear that *in the marketplace*, most organic shoppers cannot be feeling burdened with a sense “confusion” with the current system – too few recognise the symbols, let alone understand what they represent. Consequently if OFA decides to continue with the current multi-symbol system, there is a good deal of work to be done in raising awareness and understanding of the current symbols, if the system is to be useful to a significant number of organic food buyers and to the manufacturers who pay a testing fee.
- It’s also clear that, once the current system and symbols are explained to shoppers, and they are asked their preference to either retain the current system or move to a single-symbol system, the vast majority would prefer to *make the change*. Obviously, again, this would involve taking steps to educate consumers about the new symbol and its meaning. Incorporating the words “Certified Organic” as part of the symbol would be a simple, obvious start.

## 4. Summary charts

# Frequency buy organic foods

"Thinking about **organic food**. How often, if ever, do you **buy** each of the following?"

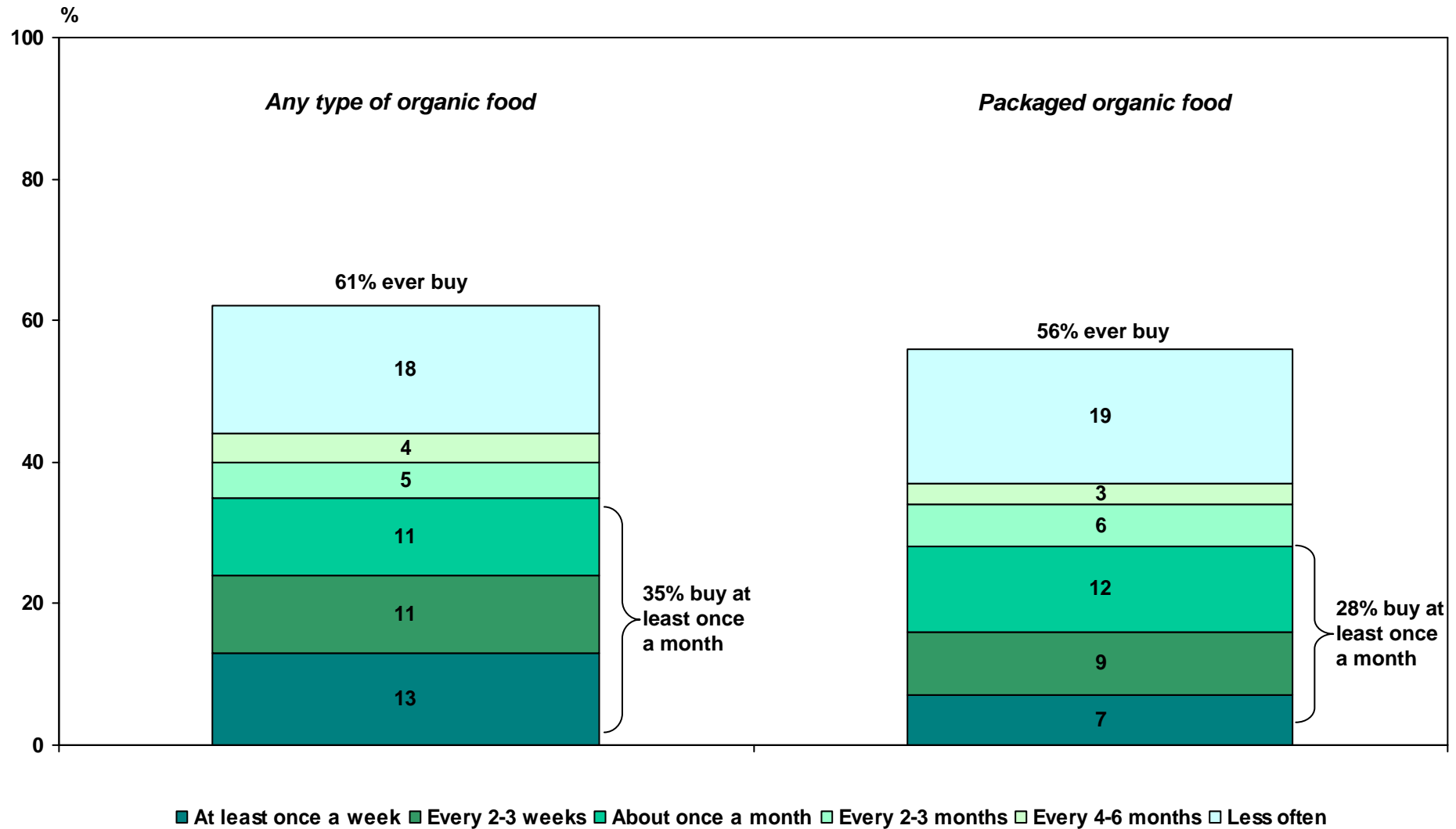


FIGURE 1

BASE: MAIN GROCERY BUYERS AGED 18+ NATIONALLY (n=966)

# Symbols seen on food packaging

“Thinking now about **food labelling**. Below are some **symbols** which appear on the **packaging** of certain foods.  
Which of these symbols have you **seen** before on food packaging?”

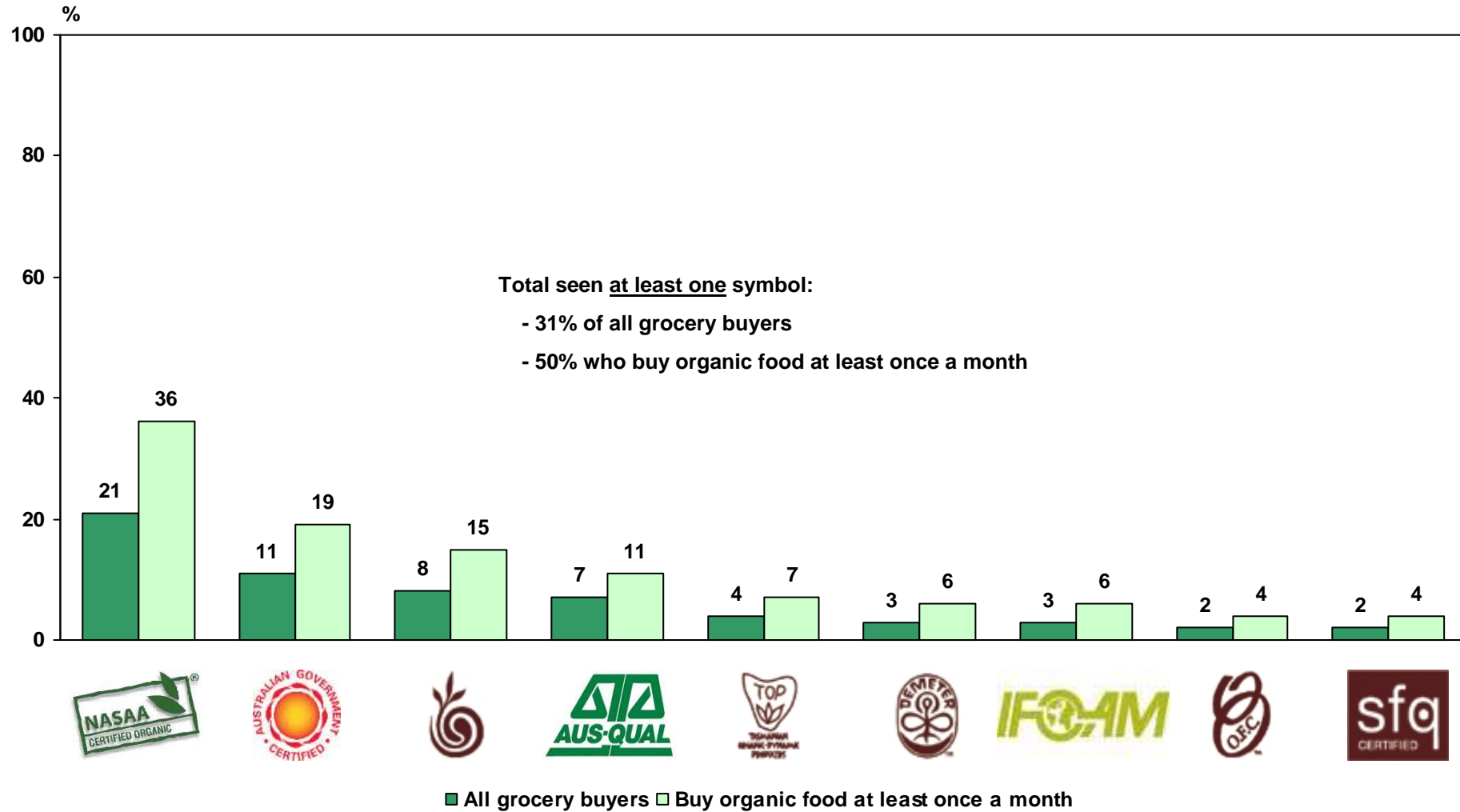
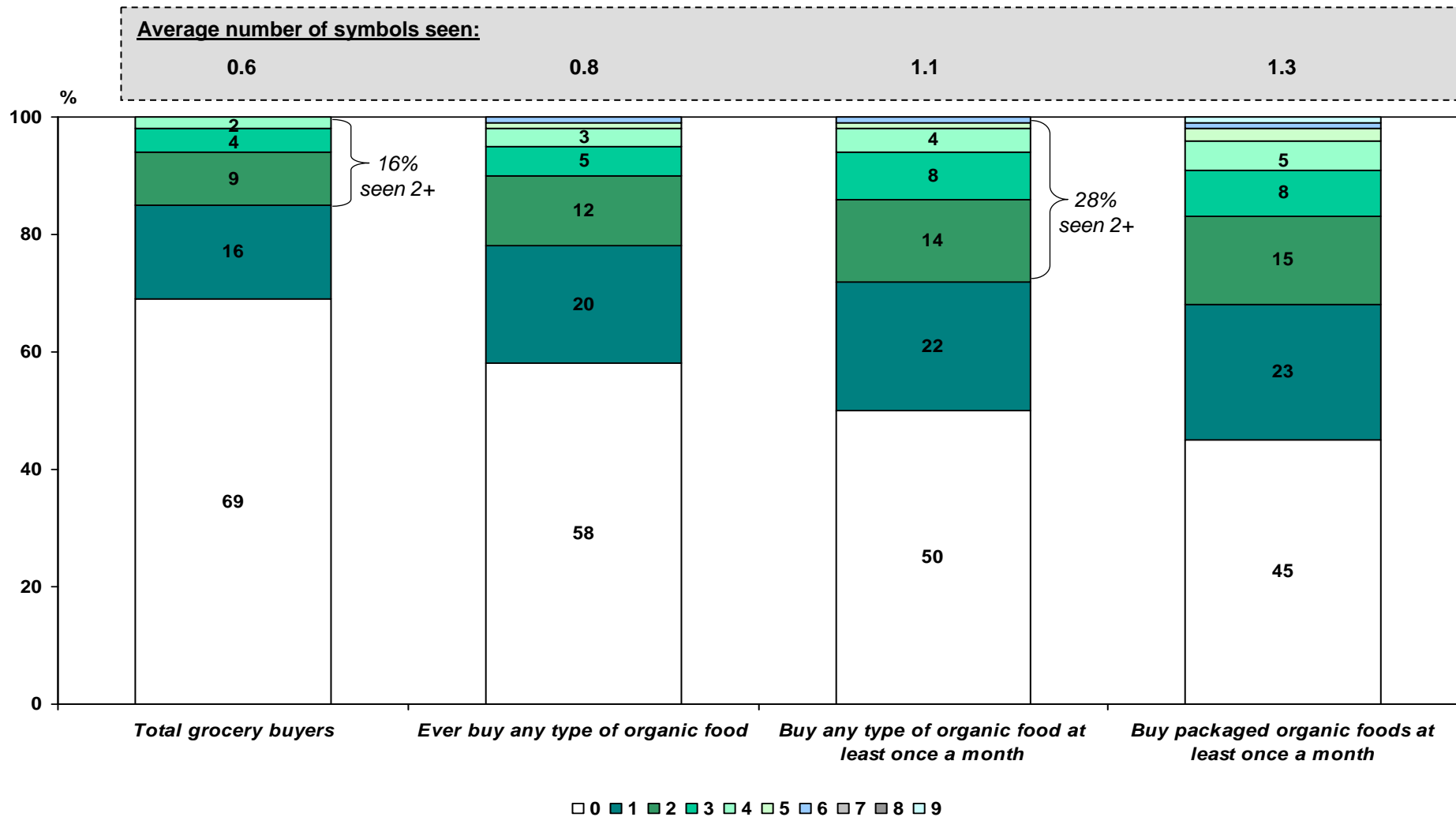


FIGURE 2

BASE: MAIN GROCERY BUYERS AGED 18+ NATIONALLY (n=966)  
BUY ANY TYPE OF ORGANIC FOOD AT LEAST ONCE A MONTH (n=414)

# Number of symbols seen on food packaging

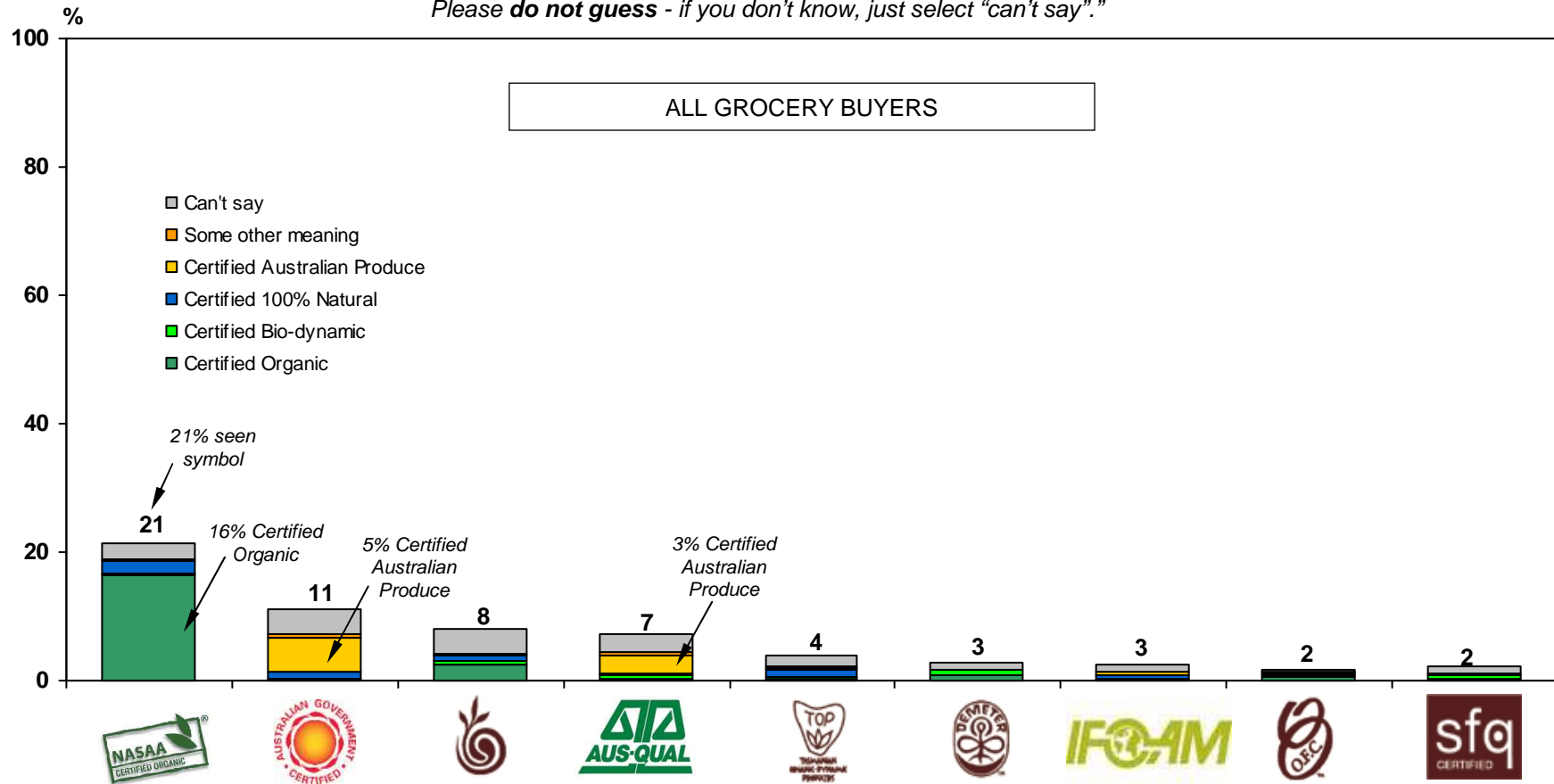


**FIGURE 3**

BASE: MAIN GROCERY BUYERS AGED 18+ NATIONALLY (n=966); EVER BUY ANY TYPE OF ORGANIC FOOD (n=600); BUY ANY TYPE OF ORGANIC FOOD AT LEAST ONCE A MONTH (n=414); BUY PACKAGED ORGANIC FOODS AT LEAST ONCE A MONTH (n=265)

# Awareness of symbol meaning

“Based on what you **know**, which one of these terms best describes the **meaning** of each symbol?  
Please **do not guess** - if you don't know, just select “can't say”.”



% Grocery buyers recognise symbol and believe it means “Certified Organic” / “Certified Bio-dynamic”

Certified Organic	16%	0.3%	2%	0.3%	0.3%	1%	0.4%	1%	0.4%
Certified Bio-dynamic	0.4%	0.1%	1%	1%	0.3%	1%	-	0.2%	0.3%

FIGURE 4a

BASE: MAIN GROCERY BUYERS AGED 18+ NATIONALLY (n=966)

# Awareness of symbol meaning

AMONG THOSE BUY ORGANIC FOOD AT LEAST ONCE A MONTH



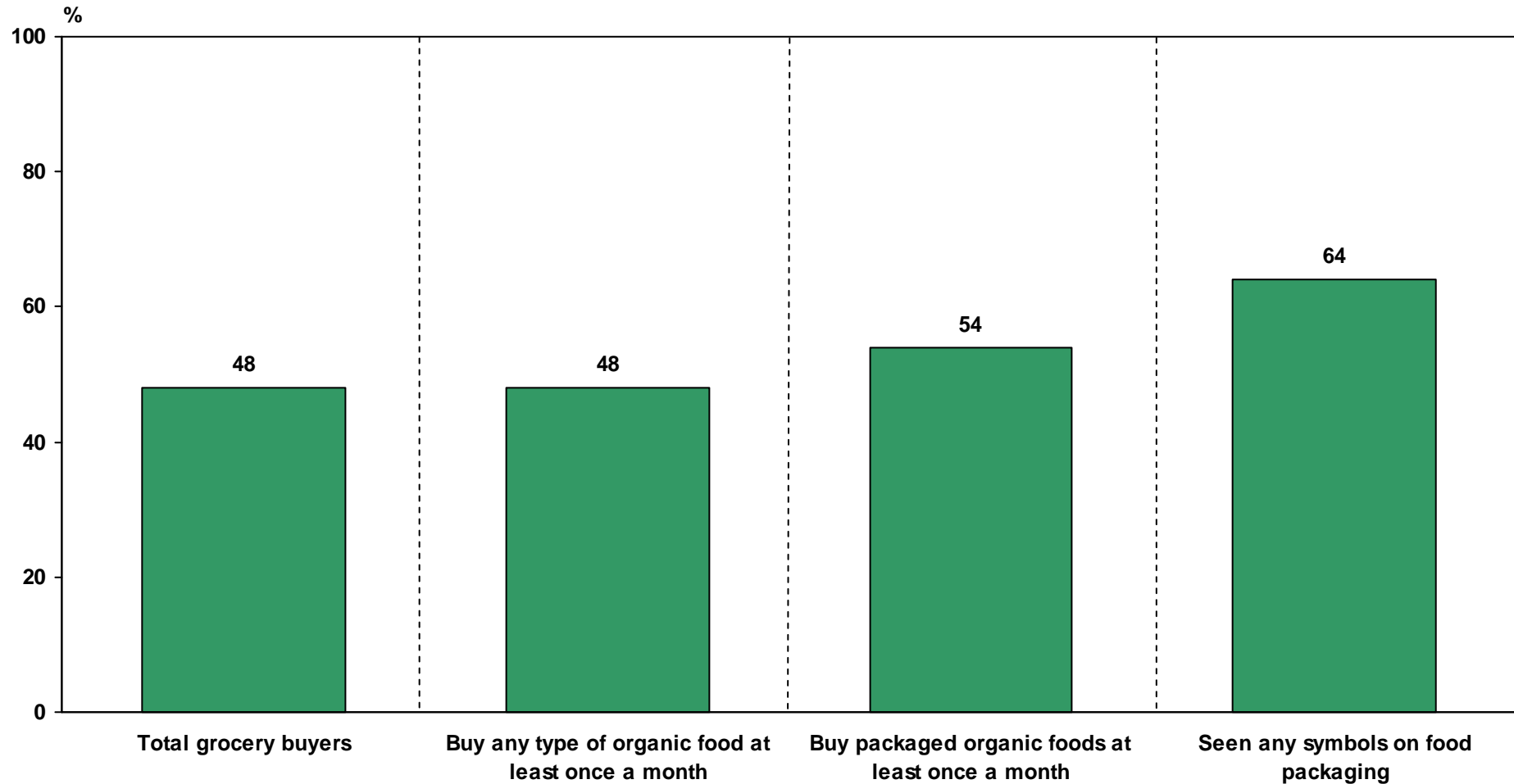
<b><u>Total seen symbol</u></b>	<b>36%</b>	<b>19%</b>	<b>15%</b>	<b>11%</b>	<b>7%</b>	<b>6%</b>	<b>6%</b>	<b>4%</b>	<b>4%</b>
<b><u>Seen symbol and believe means:</u></b>									
<b>Certified Organic</b>	<b>28%</b>	<b>1%</b>	<b>4%</b>	<b>1%</b>	<b>1%</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>1%</b>
<b>Certified Biodynamic</b>	<b>1%</b>	<b>-</b>	<b>2%</b>	<b>1%</b>	<b>1%</b>	<b>2%</b>	<b>-</b>	<b>1%</b>	<b>1%</b>

**FIGURE 4b**

BASE: BUY ANY TYPE OF ORGANIC FOOD AT LEAST ONCE A MONTH (n=414)

# Awareness of independent testing of organic foods

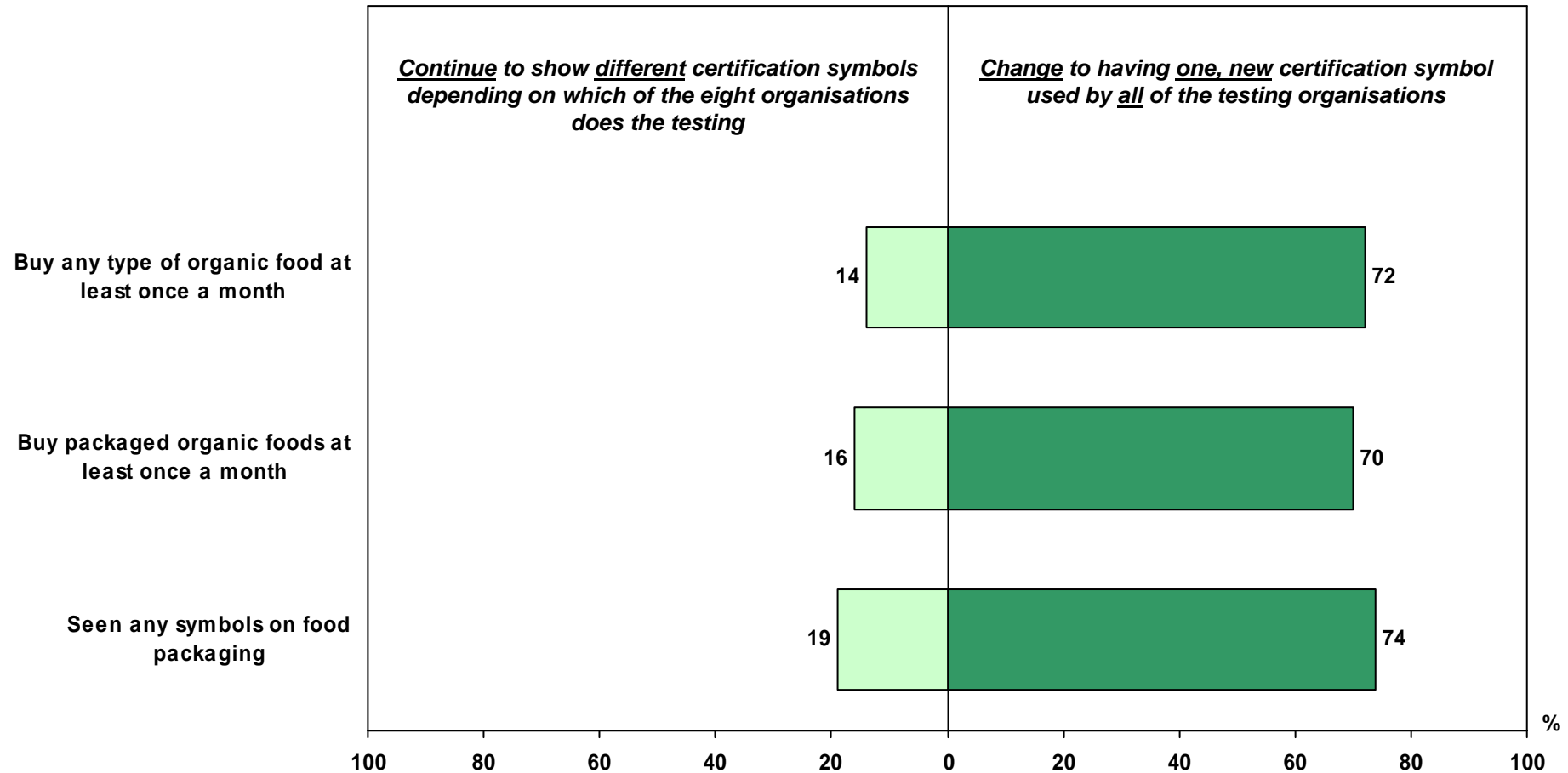
*“In Australia, a food producer who markets **organic** foods can pay a fee to have their foods checked by one of eight **independent** testing organisations to verify that their foods are **genuinely organic**. Before today, were you **aware** there are accredited organisations that do independent testing of organic foods?”*



**FIGURE 5** BASE: MAIN GROCERY BUYERS AGED 18+ NATIONALLY (n=966); BUY ANY TYPE OF ORGANIC FOOD AT LEAST ONCE A MONTH (n=414); BUY PACKAGED ORGANIC FOODS AT LEAST ONCE A MONTH (n=265); SEEN ANY SYMBOLS ON FOOD PACKAGING (n=204)

# Preferred certification system

“Each of the eight independent testing organisations has its own **certification** symbol (shown above), which is shown on the **label or package** of foods they have verified as being genuinely organic. It’s been suggested that **only one**, completely **new** certification symbol should be used on labels or packages for organic foods, regardless of which organisation does the testing. Which of these is your preference?”



**FIGURE 6a** BASE: BUY ANY TYPE OF ORGANIC FOOD AT LEAST ONCE A MONTH (n=414); BUY PACKAGED ORGANIC FOODS AT LEAST ONCE A MONTH (n=265); SEEN ANY SYMBOLS ON FOOD PACKAGING (n=204)

# Reasons prefer to change to one, new certification symbol for all testing organisations

“For what reasons would you **prefer to change to one, new certification symbol for all testing organisations for organic foods?**”

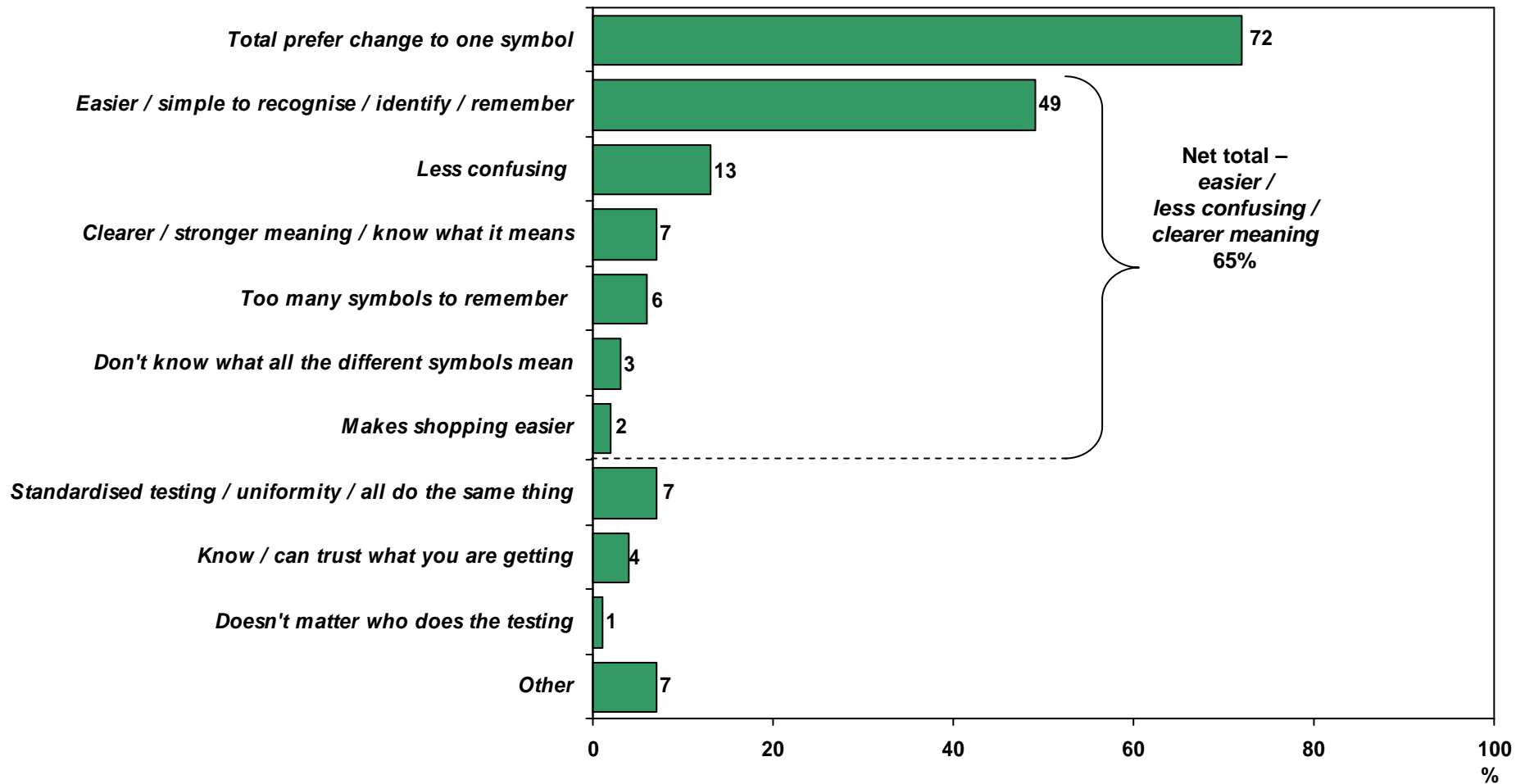


FIGURE 6b

BASE: BUY ANY TYPE OF ORGANIC FOOD AT LEAST ONCE A MONTH (n=414)

# Reasons prefer to continue with different certification symbols for each testing organisation



“For what reasons would you **prefer** to **continue** with the **different** certification symbols for each testing organisation for organic foods?”

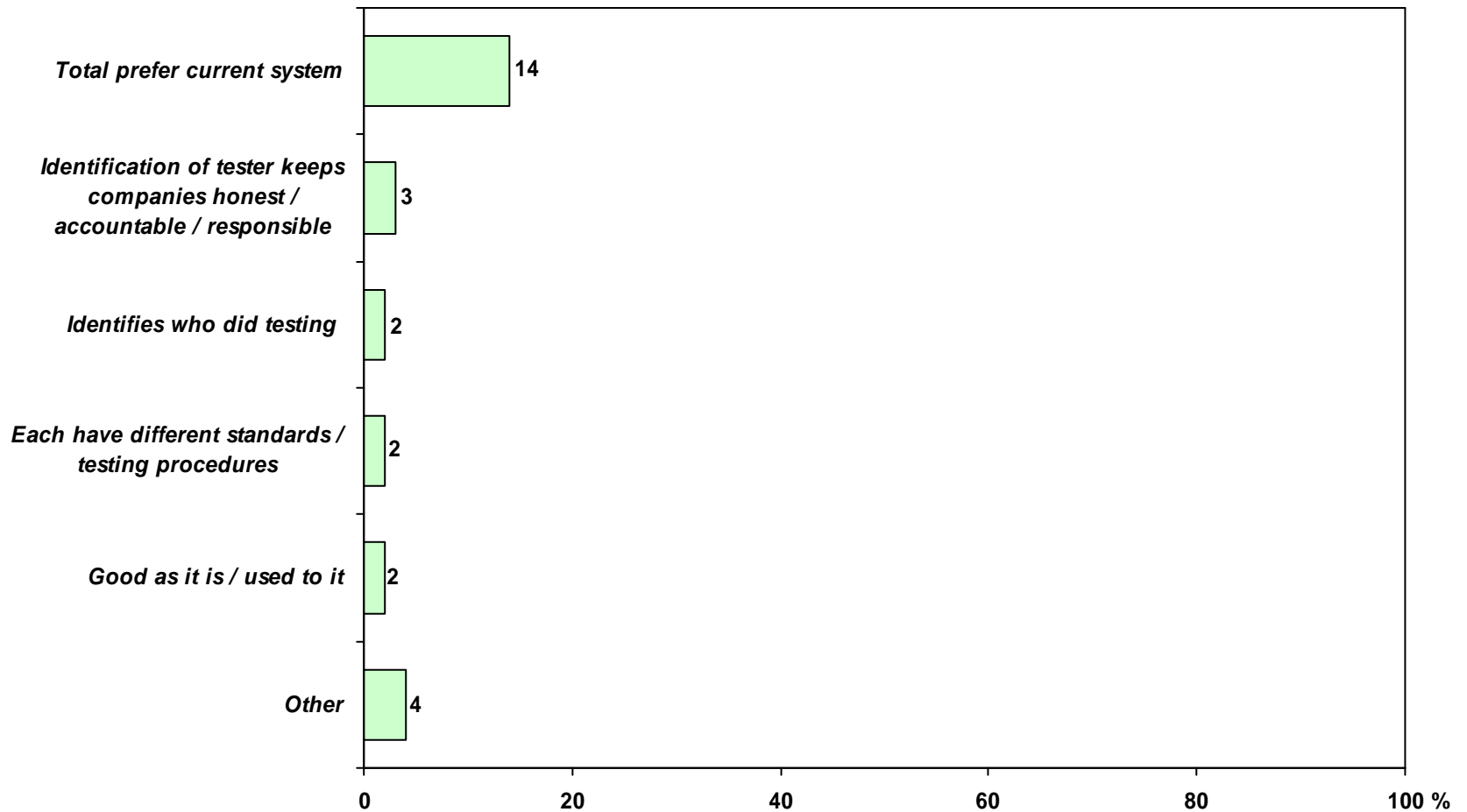
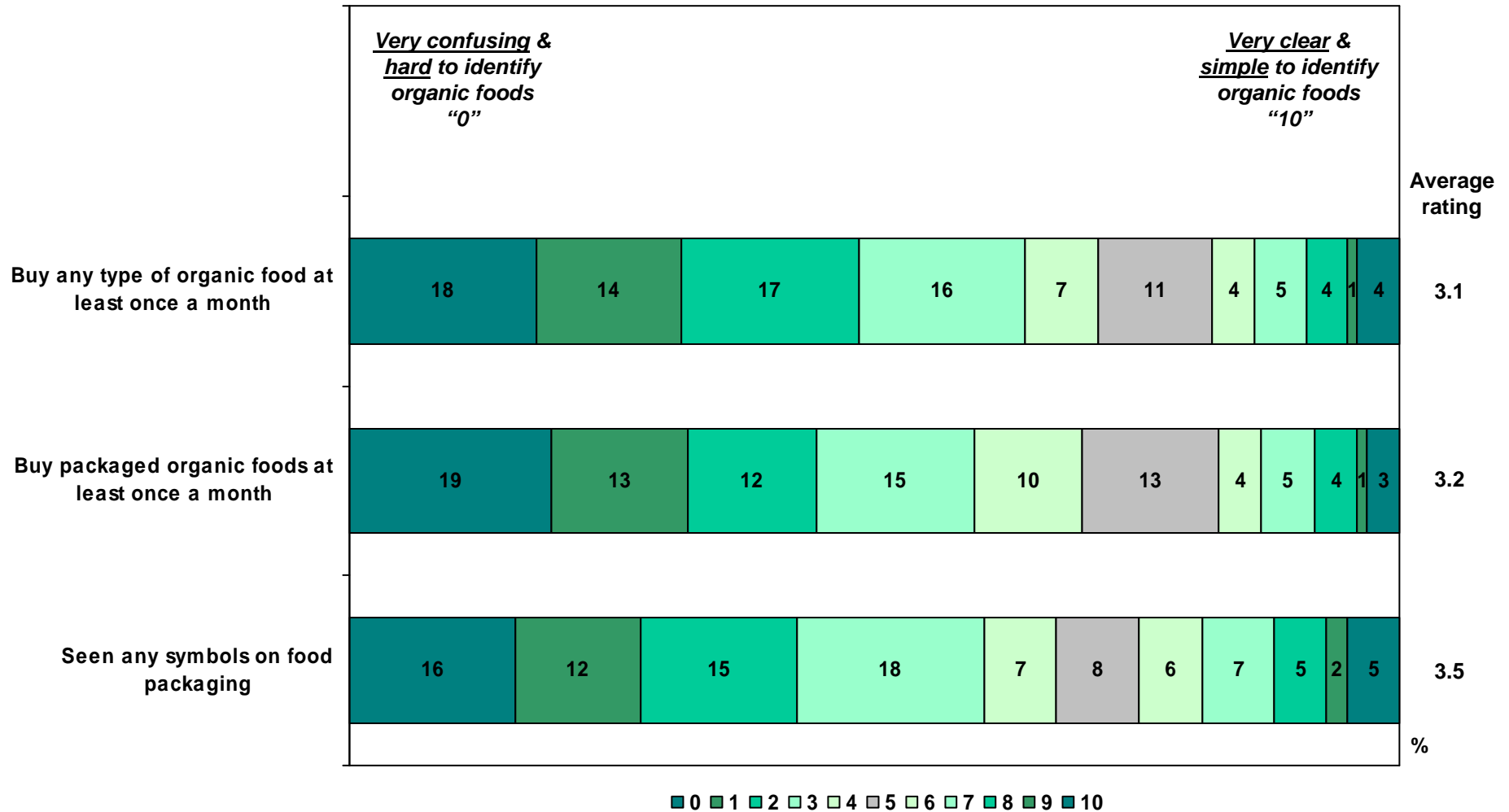


FIGURE 6c

BASE: BUY ANY TYPE OF ORGANIC FOOD AT LEAST ONCE A MONTH (n=414)

# Rating of current system of eight symbols

“Thinking about the **current system** of having eight different certification symbols. How would you rate this eight-symbol system as a way of helping people to identify genuine organic foods?”



**FIGURE 7** BASE: BUY ANY TYPE OF ORGANIC FOOD AT LEAST ONCE A MONTH (n=414); BUY PACKAGED ORGANIC FOODS AT LEAST ONCE A MONTH (n=265); SEEN ANY SYMBOLS ON FOOD PACKAGING (n=204)

# 5. Questionnaire

**SECTION F- PROG NOTE: ASK MAIN GROCERY BUYERS ONLY IE CODE 1 IN Q4 (DEMS). CODE 2 IN Q4 (DEMS) GO TO NEXT SECT**

F1 Thinking now about **food labelling**. Below are some **symbols** which appear on the **packaging** of certain foods. Which of these symbols have you **seen** before on food packaging? (*Select one answer per row*)

**PROG NOTE:**  
 - SINGLE RESPONSE REQUIRED FOR EACH ROW  
 - RANDOMISE ORDER OF A-I  
 - IF ANY CODE 1 GO TO F2  
 - IF ALL CODE 2-3 GO TO F3

		Yes \ seen on food packaging	No \ never seen	Can't say
A	SHOW ACO.jpg	1	2	3
B	SHOW AUSQUAL.jpg	1	2	3
C	SHOW BDRI.jpg	1	2	3
D	SHOW IFOAM.jpg	1	2	3
E	SHOW NASAA.jpg	1	2	3
F	SHOW OFC.jpg	1	2	3
G	SHOW SFQ.jpg	1	2	3
H	SHOW TOP.jpg	1	2	3
I	SHOW AGC.jpg	1	2	3

**PROG NOTE: ASK IF SEEN ANY SYMBOL IE ANY CODE 1 IN F1A-I. IF ALL CODE 2-3 IN F1A-I GO TO F3**

F2 Based on what you **know**, which one of these terms best describes the **meaning** of each symbol? Please **do not guess** - if you don't know, just select "can't say". (*Select one answer per row*)

**PROG NOTE:**  
 - SINGLE RESPONSE REQUIRED FOR EACH ROW  
 - ONLY SHOW A-I SEEN IN F1  
 - MAINTAIN ORDER OF A-I AS PER F1  
 - RANDOMISE ORDER OF 1-4 THEN 5-6 LAST

		Certified Australian produce	Certified Organic	Certified 100% Natural	Certified Bio-dynamic	Some other meaning	Can't say
A	SHOW ACO.jpg	1	2	3	4	5	6
B	SHOW AUSQUAL.jpg	1	2	3	4	5	6
C	SHOW BDRI.jpg	1	2	3	4	5	6
D	SHOW IFOAM.jpg	1	2	3	4	5	6
E	SHOW NASAA.jpg	1	2	3	4	5	6
F	SHOW OFC.jpg	1	2	3	4	5	6
G	SHOW SFQ.jpg	1	2	3	4	5	6
H	SHOW TOP.jpg	1	2	3	4	5	6
I	SHOW AGC.jpg	1	2	3	4	5	6

**PROG NOTE: ASK ALL MAIN GROCERY BUYERS IE CODE 1 IN Q4 (DEMS)**

F3 Thinking about **organic food**. How often, if ever, do you **buy** each of the following? (*Select one answer per row*)

**PROG NOTE:**  
 - SINGLE RESPONSE REQUIRED FOR EACH ROW  
 - IF ANY CODE 1-3 GO TO F4  
 - IF ALL CODE 4-8 GO TO NEXT SECT

		At least once a week	Every 2 to 3 weeks	About once a month	Every 2 to 3 months	Every 4 to 6 months	Less often	Never	Can't say
A	Any type of organic food	1	2	3	4	5	6	7	8
B	Packaged organic foods	1	2	3	4	5	6	7	8
C	Fresh organic foods (e.g. vegetables \ meat) <b>not</b> shrink-wrapped in plastic	1	2	3	4	5	6	7	8
D	Fresh organic foods (e.g. vegetables \ meat) <b>shrink-wrapped in plastic</b>	1	2	3	4	5	6	7	8

**PROG NOTE: ASK IF BUY ORGANIC FOOD AT LEAST ONCE A MONTH IE ANY CODE 1-3 IN F3A-D. IF ALL CODE 4-8 IN F3A-D GO TO NEXT SECT**

F4 In Australia, a food producer who markets **organic** foods can pay a fee to have their foods checked by one of eight **independent** testing organisations to verify that their foods are **genuinely organic**. Before today, were you **aware** there are accredited organisations that do independent testing of organic foods? (*Select one answer*)

**PROG NOTE:**  
 - SINGLE RESPONSE

1	Yes \ aware
2	No \ not

F5 Each of the eight independent testing organisations has its own **certification** symbol (*shown above*), which is shown on the **label or package** of foods they have verified as being genuinely organic. It's been suggested that **only one**, completely **new** certification symbol should be used on labels or packages for organic foods, regardless of which organisation does the testing. Which of these is your preference? (*Select one answer*)

**PROG NOTE:**  
 - SINGLE RESPONSE  
 - SHOW Section\_F\_Symbols.jpg ON TOP HALF OF SCREEN  
 - SHOW QUESTION F5 ON BOTTOM HALF OF SCREEN  
 - RANDOMISE ORDER OF 1-2 THEN 3 LAST  
 - IF CODE 1-2 GO TO F6  
 - IF CODE 3 GO TO F7

1	Continue to show <b>different</b> certification symbols depending on which of the eight organisations does the testing
2	Change to having <b>one, new</b> certification symbol used by <b>all</b> of the testing organisations
3	No preference \ can't say

**PROG NOTE: ASK IF HAVE PREFERENCE IE CODE 1-2 IN F5. CODE 3 GO TO F7**

F6 For what reasons would you **prefer** to (**PROG NOTE: IF CODE 1 IN F5 INSERT TEXT: "continue with the different certification symbols for each testing organisation" ELSE INSERT TEXT "change to one, new certification symbol for all testing organisations"**) for organic foods? (*Please type response in box - a maximum of 500 characters*)

**PROG NOTE:**  
 - OPEN TEXT FIELD  
 - MAXIMUM OF 500 CHARACTERS. IF MORE THAN 500 CHARACTERS IS ENTERED PLEASE SHOW MESSAGE (*Maximum of 500 characters allowed*)  
 - IF NO TEXT IS ENTERED AND THE RESPONDENT TRIES TO CLICK FORWARD PLEASE SHOW MESSAGE (*if you have no comment to make, please type in "can't say"*)

**PROG NOTE: ASK ALL BUY ORGANIC FOOD AT LEAST ONCE A MONTH IE ANY CODE 1-3 IN F3A-D**

F7 Thinking about the **current system** of having eight different certification symbols. How would you rate this eight-symbol system as a way of helping people to identify genuine organic foods? (*Select one answer*)

**PROG NOTE:**  
 - SINGLE RESPONSE

Very confusing and hard to identify organic foods											Very clear and simple to identify organic foods
0	1	2	3	4	5	6	7	8	9	10	
0	1	2	3	4	5	6	7	8	9	10	