Who Is the Natural Shopper in 2024?

Signs point to a more holistic paradigm of sustainability, integrity and health in our food system

A RESEARCH REPORT FROM THE NON-GMO PROJECT

The Non-GMO Project

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EXECUTIVE SUMMARY

Who is the natural shopper in 2024? The Non-GMO Project has conducted a regular survey of adults in the U.S. and Canada since 2019. Our most recent research brings into focus how shoppers are evolving in their awareness and their preference for certain attributes that transcend brand and product affinities.

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Introduction

The natural food trend has been in place since the beginning of the modern "health food" movement in the 1970s, which promoted unbranded local fresh produce and bulk commodities such as organic oats, barley and rice. However, the emergence of the modern natural products industry, established by cornerstone regional, national and international natural brands (e.g., Nature's Path, Bob's Red Mill, Annie's, Dr. Bronner's, Stonyfield, Applegate, etc.) has helped diversify, expand and distribute natural products. The universe of "better-for-you" products is available not just at health food stores and community cooperatives but in virtually every retail store in the U.S. and Canada. With this diversity, breadth and availability of natural products, shoppers have countless choices. One of the most useful tools for decision-making in the grocery store is the attribute, whatever it might be, that distinguishes a natural product from a conventional one. Organic, non-GMO, fair trade and cruelty-free are examples of "natural" attributes – part of an ever-growing list that today includes attributes such as gluten-free, biodynamic, upcycled, regenerative, and more.

The expanding universe of natural attributes corresponds with the increasingly expansive preferences of shoppers who want premium, value-added products that align more closely with their desire to eat better and do better. At the same time, many shoppers have become increasingly aware that conventional food production that prioritizes low cost has also resulted, in many cases, in low quality and poor environmental and social outcomes.

Fifty years into the modern natural products industry, it is now possible not only to define the natural shopper with some accuracy, but to closely monitor how their tastes and preferences are evolving year by year.

Our research found that the natural shopper continues to be strongly committed to the two core attributes of natural products: organic and non-GMO groceries and produce. This is true even as the next generation of shoppers, Gen Z, reaches an age where they are making independent decisions about what groceries to buy. At the same time, younger people are beginning to shop with a more expansive view of what is natural, and the industry continues to innovate in the area of attributes.

A common thread throughout the last thirty years has been the steadily increasing value of third-party certifications. The need for validated attributes has increased while marketers have recognized the value of amplifying natural attributes. As savvy shoppers are increasingly skeptical of marketing hype in the form of "greenwashing," they have recognized the value of independent third-party certifiers, driven in large part by the success of the USDA's National Organic Program, which established a meaningful objective standard and legal requirements for any product sold as organic after 2000.

Our research looks closely at today's natural shopper, what attributes they are aware of and seeking out, why they have those preferences, and how these are expressed in their engagement with "clean label" certifications.

What is “natural”?

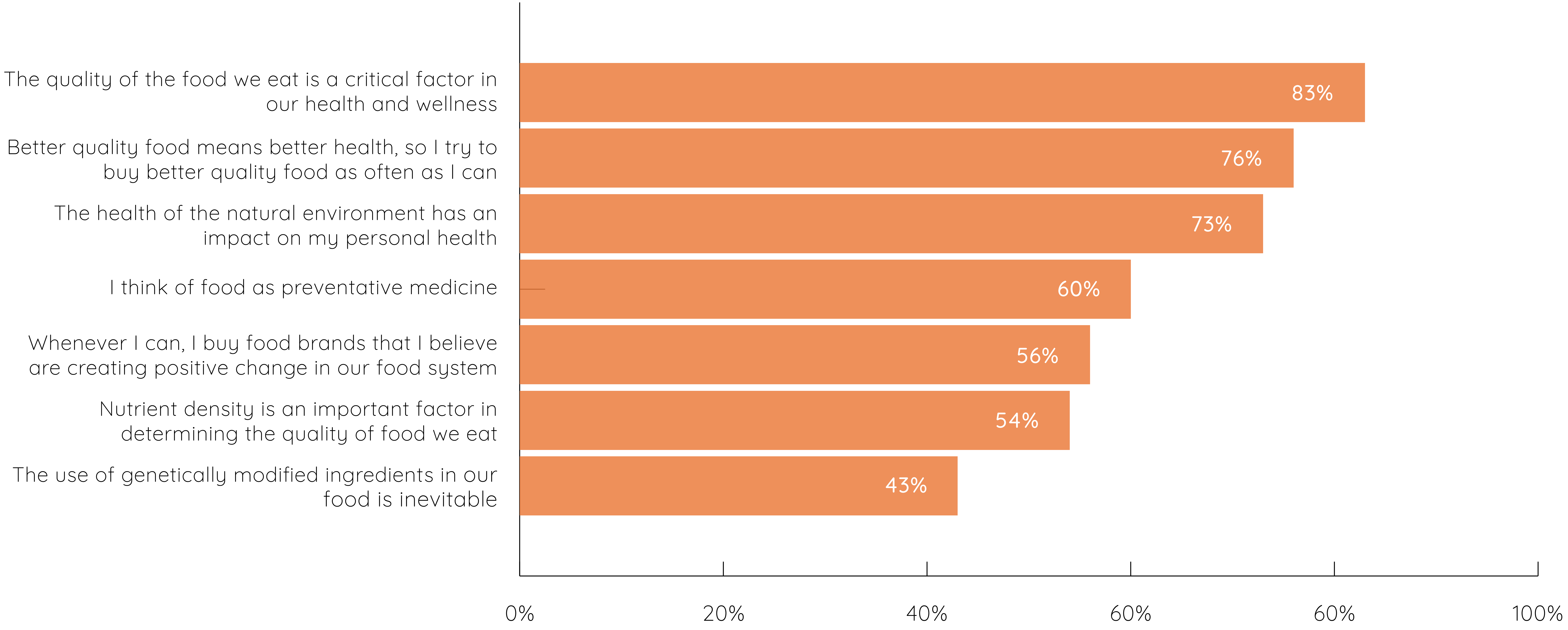
A definition derived from the perceptions, associations, attitudes and preferences of certain shopper segments

Yesterday’s “health food nuts” are today’s “natural shoppers.” So how did we get here? Aside from the mainstreaming of many regional and national organic brands, a whole apparatus of education, marketing, promotion and outreach has developed around this industry to serve what we believe is “the natural intuition” – that people are innately aware that food comes from nature, and the more “direct” the pathway of production and distribution, the better it is for the body. More than 83% of all adults in the U.S. and Canada agree with the statement, “The quality of the food we eat is a critical factor in our health and wellness.” (See Table 1). This association between quality, health, food and the environment is strong, and it translates into preference in the grocery store for nearly half of all shoppers in our survey. At the same time, most shoppers are aware that the decisions they make at the grocery store can have a positive – or a negative – effect on not only their own personal health but the health of the soil, the environment and even the planet (Table 2).

People are innately aware that food comes from nature, and the more “direct” the pathway of production and distribution, the better it is for the body.

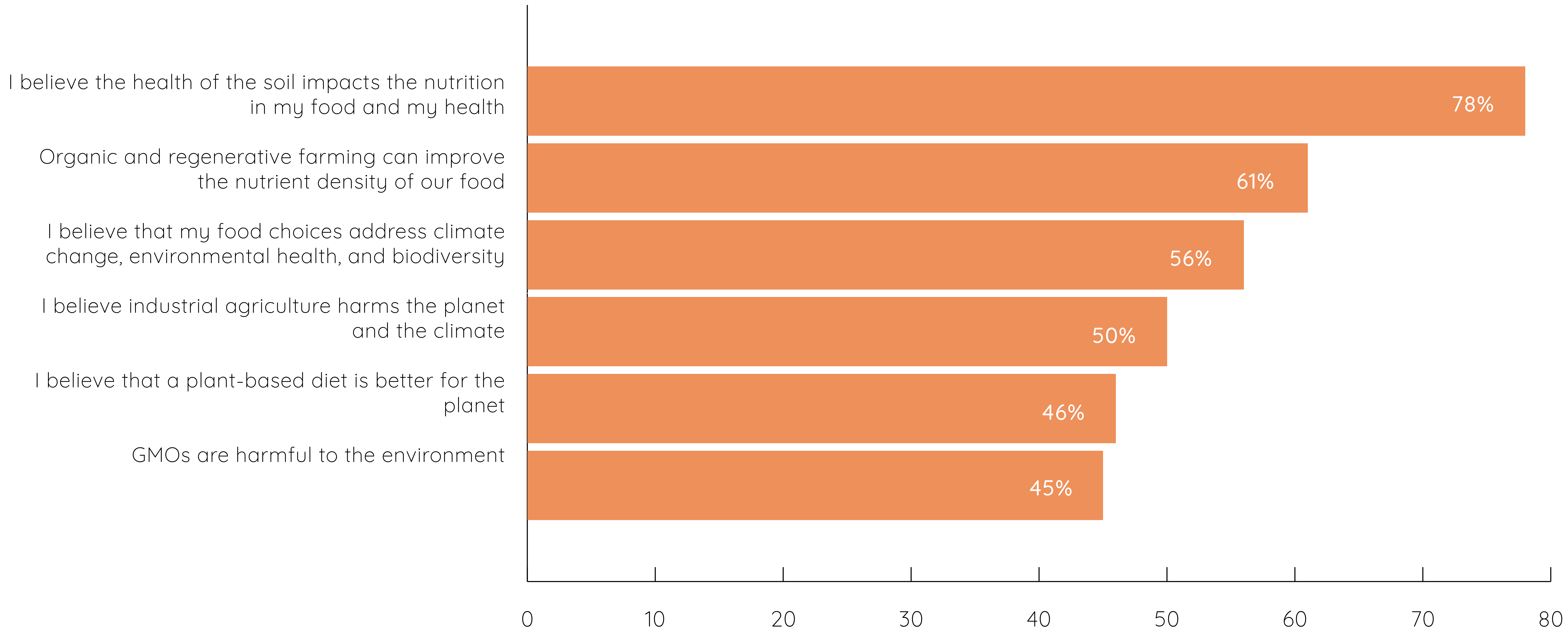
Attitudes About Health, Wellness and Food

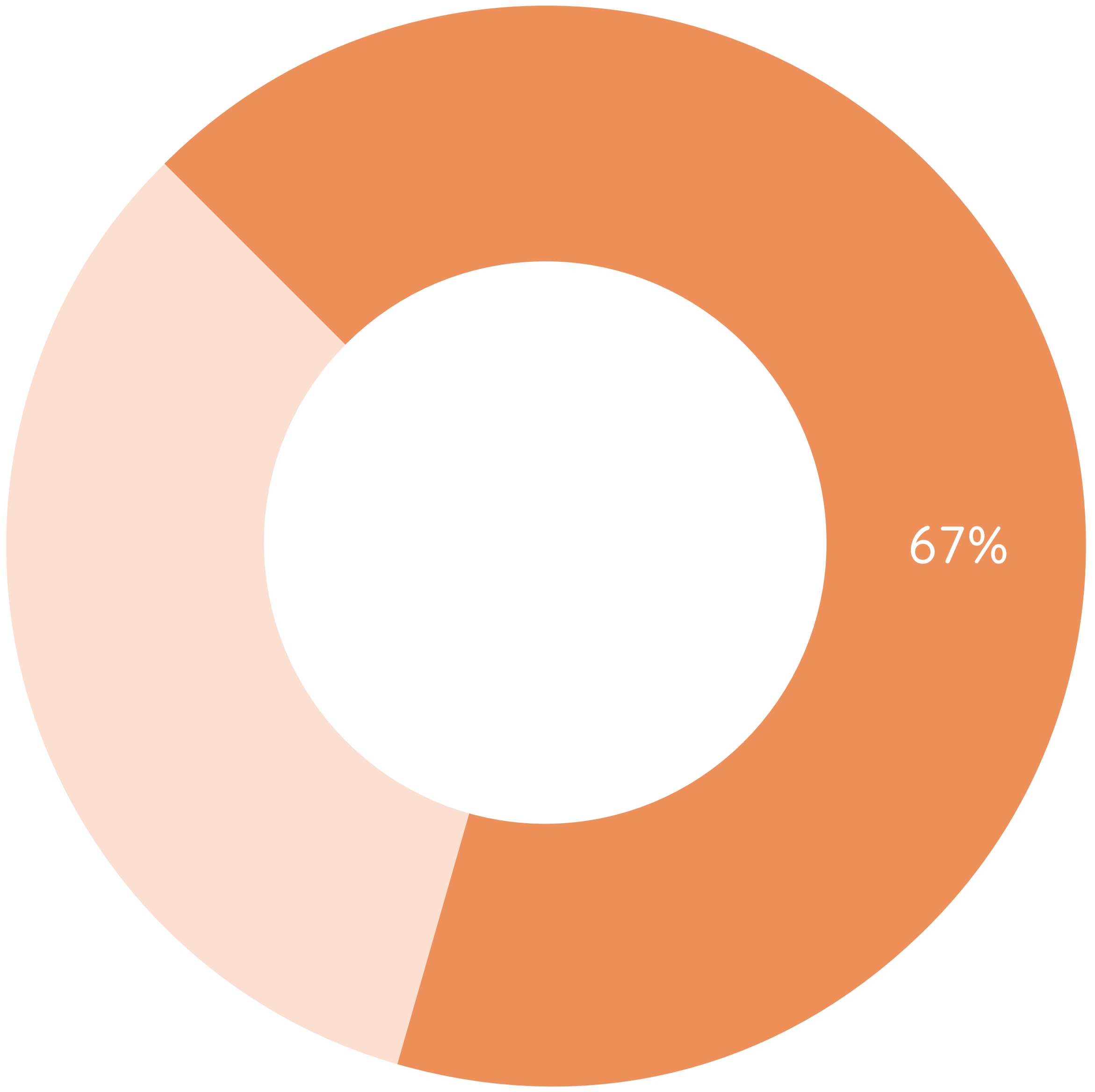
Table 1. How much do you agree/disagree with the following statements about health, wellness and food?
Top 2-box selected. SCALE IS: strongly agree, somewhat agree, neither, somewhat disagree, strongly disagree. N=600



Attitudes About Food Production, Health, Environment and Climate Change

Table 2. How much do you agree/disagree with the following statements about climate change and farming practices? Top 2-box selected. SCALE IS: strongly agree, somewhat agree, neither, somewhat disagree, strongly disagree. N=600



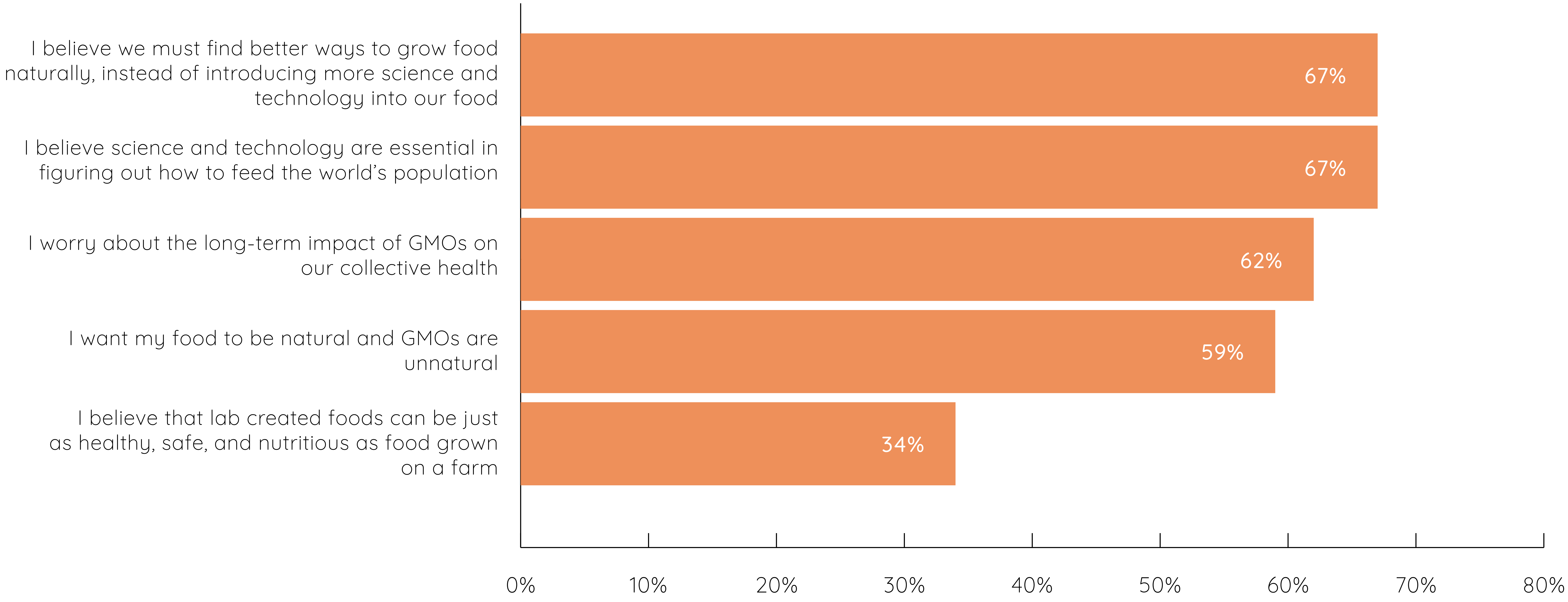


Today, more than two-thirds (67%) of all adult shoppers agree that “we must find better ways to grow food naturally, instead of introducing more science and technology into our food” (Table 3).

At the same time, there is also recognition that “science and technology” have a role to play in addressing population growth globally. This tension — a generally positive but cautious attitude toward food technologies — will be explored further below, but it is most apparent in continuing skepticism of the need for GMOs in the food system, as well as less agreement on the desirability of creating foods in laboratories. We believe such caution is another expression of “the natural intuition” that co-exists with optimism about science and technology more generally outside of the food system.

Attitudes About Food Science and Technology

Table 3. How much do you agree/disagree with the following statements about science & technology? Top 2-box selected. SCALE IS: strongly agree, somewhat agree, neither, somewhat disagree, strongly disagree. N=600.



The results of our survey on adult attitudes to food, the environment, science and technology allow us to group together those who self-report a strong preference for food that is holistically "better" than conventional food – better for their health, for the environment, for soil, for biodiversity and even for climate change. Additional and emergent preferences include a desire for products that are more humane to animals, more ethical and equitable for farmers and farmworkers, and interest in more plant-based foods and less waste. It is also possible to include dietary affinities such as gluten-free, artificial-ingredient-free, etc., among the attribute set of the natural shopper segments. We can see in more detail all of the most important "natural" attributes in the "Attributes and Certifications" section below.

The natural shopper in focus

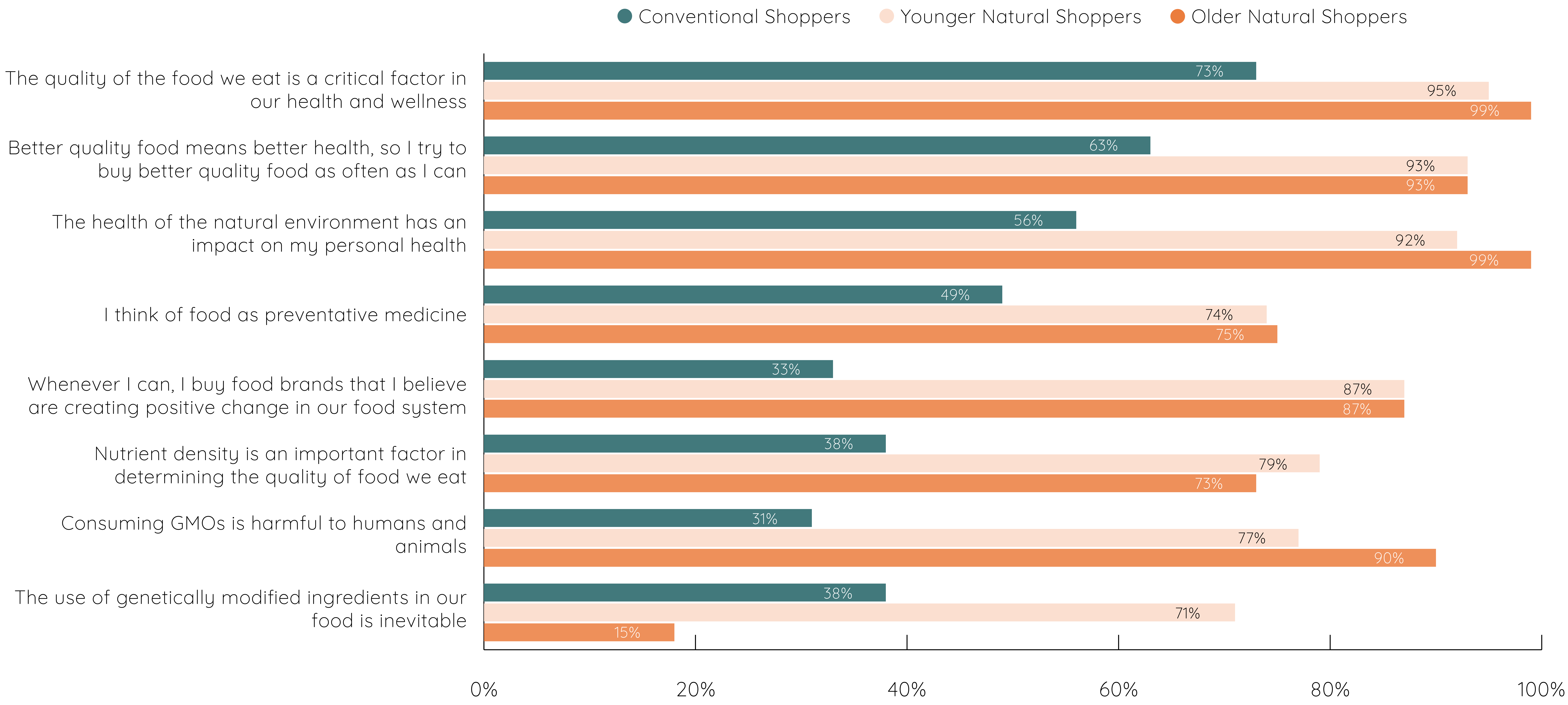
When we factor out the general population, the natural shoppers' attitudes come into clear focus. Natural shoppers overwhelmingly (90+%) say they associate quality food with health and wellness, and this association extends to the natural environment where food is grown (Table 4). When it comes to the connections between healthy environments, healthy food and a healthy planet, natural segments also index around 90% agreement that healthy soils make more nutritious food, and the right food choices can help address climate change, environmental sustainability and loss of biodiversity (Table 5). Most natural shoppers do not see a place for GMOs in the food system (Table 6). Of the total population in the U.S. and Canada, 40% are natural shoppers, or 2 in 5 shoppers, or about 117 million adults.

While natural shopper attitudes have shown remarkable stability since we began our surveys in 2019, three trends are emerging in 2024. First, all shoppers, including those who prefer natural attributes, are feeling financial pressure that is negatively impacting their ability to exercise their preferences. Second, emerging attributes such as upcycled, regenerative and nutrient density garner positive reception, and shoppers' desire for ethical standards like animal welfare and fair trade continue to grow. Third, and perhaps being a catalyst for the second, the next generation of shoppers (Gen Z) is now revealing its preferences and is on track to be the "greenest" shopper yet.

Most natural shoppers do not see a place for GMOs in the food system.

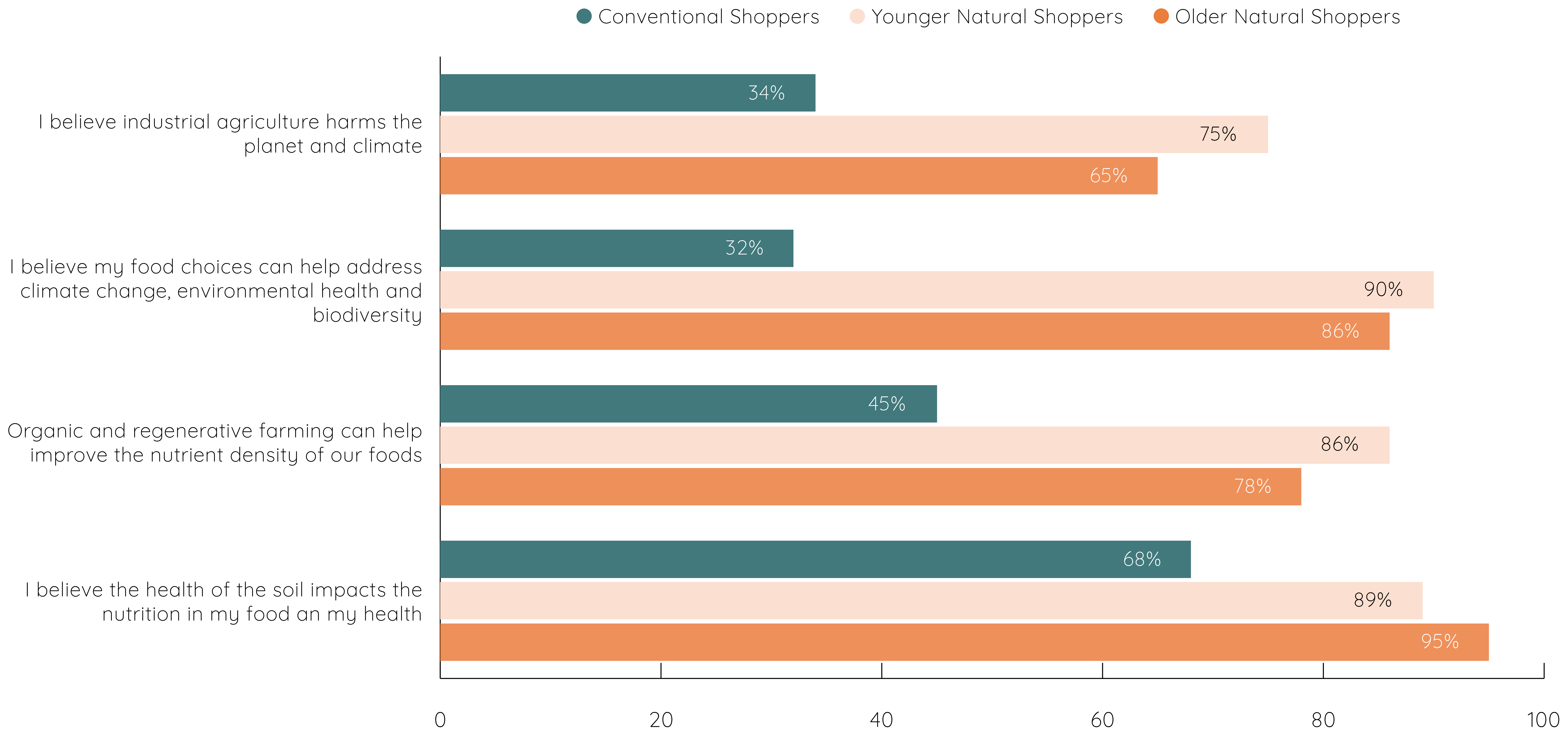
Natural vs. Conventional Shopper Attitudes on Food and Health

Table 4. How much do you agree/disagree with the following statements about health, wellness and food? Selected “strongly” or “somewhat” agreed.



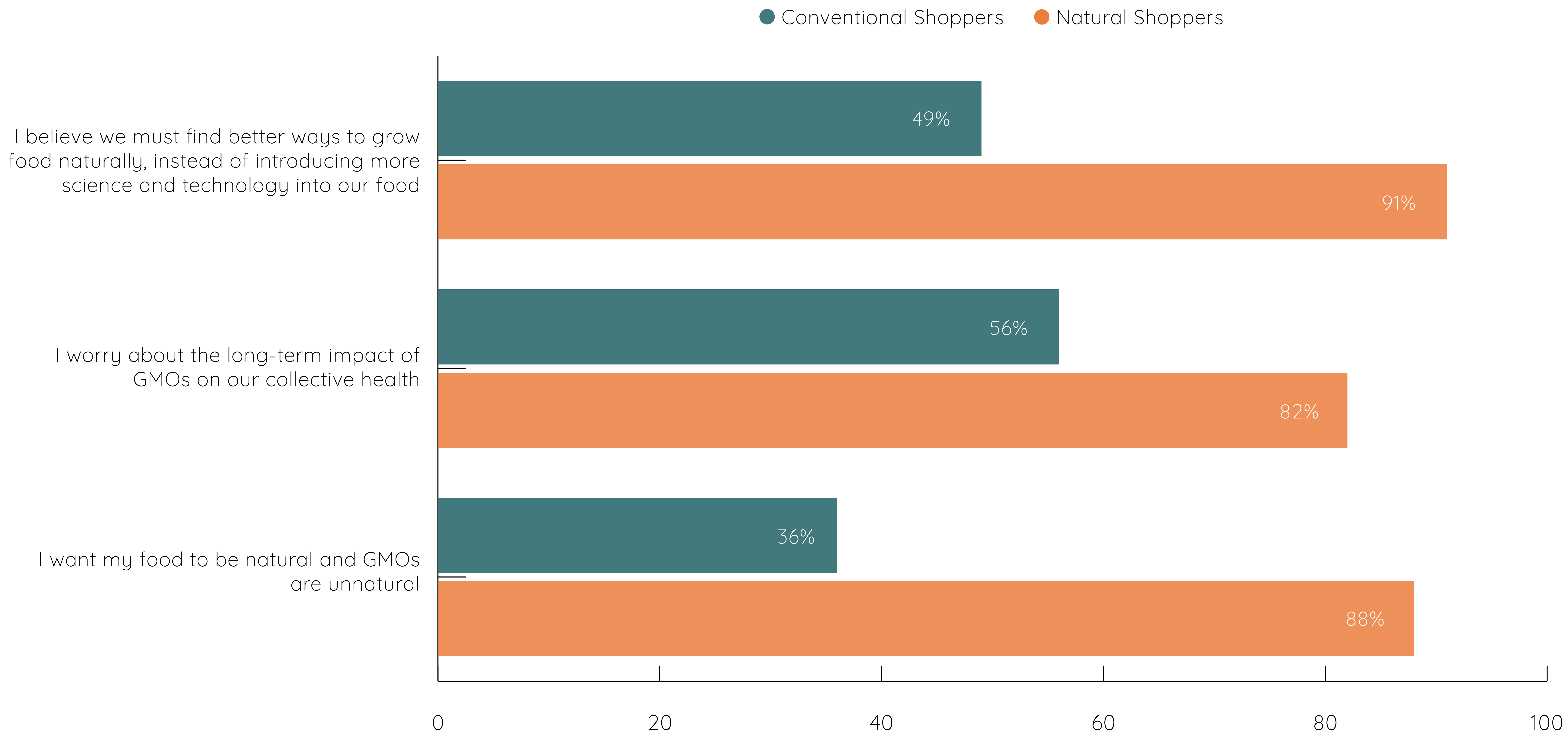
Natural vs. Conventional Shoppers on Food, Health and Climate Change

Table 5. How much do you agree/disagree with the following statements about climate change and farming practices? Selected "strongly" or "somewhat" agreed.



Natural vs. Conventional Shoppers on GMOs and Food Technology

Table 6. How much do you agree/disagree with the following statements about science & technology? Selected "strongly" or "somewhat" agreed.



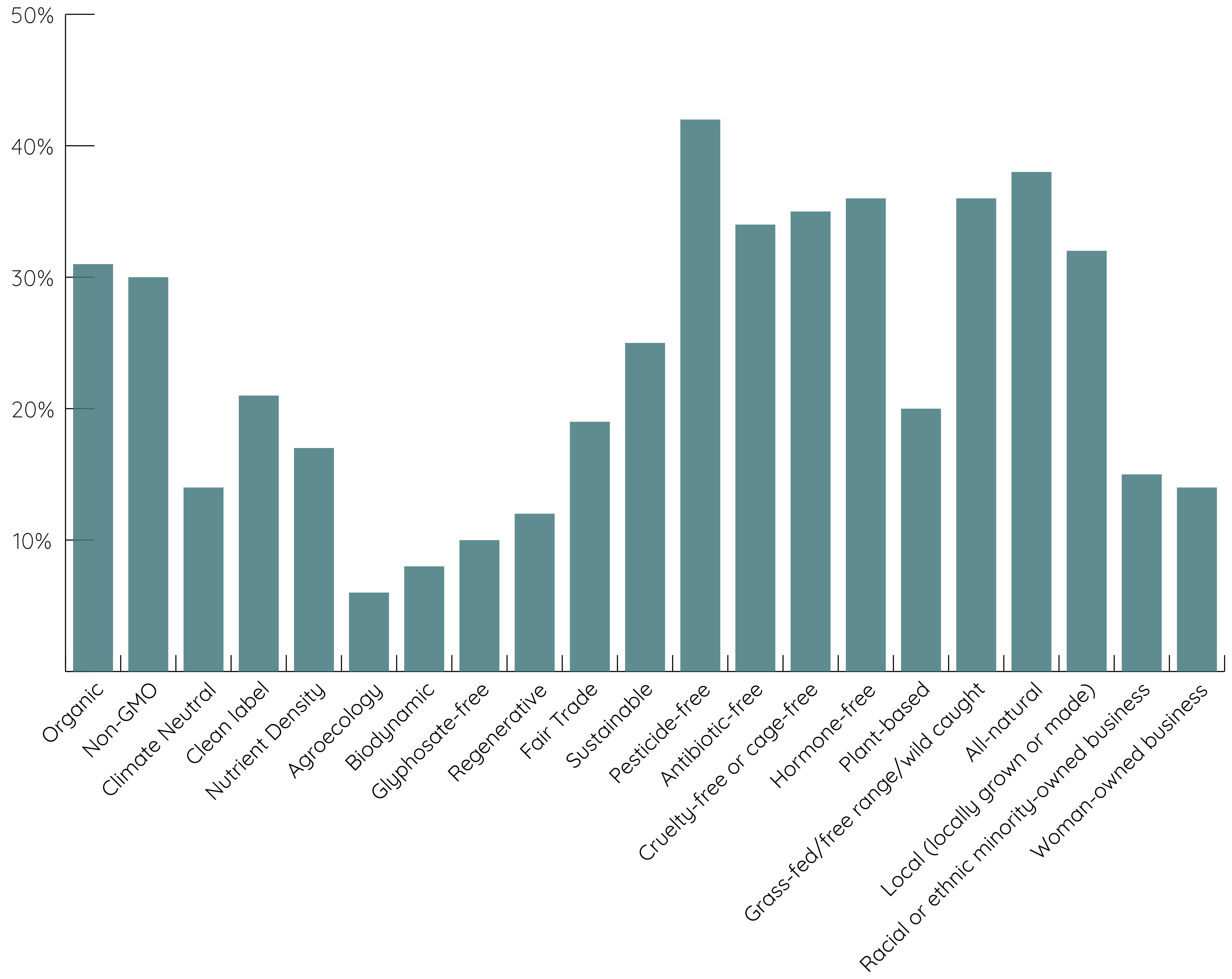
Mapping natural attributes to certifications

It is possible to map “the natural intuition” by understanding which attributes a shopper is aware of, which they seek out and to what degree (Table 7). Since we began our survey in 2019, the list of natural attributes has grown in part because there have been innovations in both production and in marketing, as well as increased media coverage (e.g., the emergence of “regenerative” as a term applying to certain kinds of food production). Because shoppers today are sensitive to marketing hype and skeptical of greenwashing, it’s important to distinguish between attributes that present simply as marketing descriptions or label promotions and those attributes that are certified by third parties. Among all certified attributes, USDA certified organic and Non-GMO Project Verified are foundational and continue to outpace other certified attributes by a significant factor when considering both the recognition (Table 8) and the self-reported importance of the certification when shopping. USDA certified organic and Non-GMO Project Verified are the only two certifications that grew in net importance from 2019 to 2023. Though many other certified attributes saw a bump during the COVID-19 pandemic, all others have fallen back to pre-pandemic levels. Organic and Non-GMO Project Verified are on par with each other, at 29% net importance each – more than 20% greater than the next-most valued certification (Certified Gluten-Free), when factoring out Canada Organic (which is, of course, exclusive to Canada and was only shown to Canadian survey participants). “Net importance” refers to the percentage of all shoppers who recognize the mark and consider it important.

USDA certified organic and Non-GMO Project Verified are the only two certifications that grew in net importance from 2019 to 2023.

NATURAL ATTRIBUTES CONSIDERED IMPORTANT AMONG ALL SHOPPERS BY PERCENTAGE

Table 7. When you are deciding what foods to buy for yourself or your family, how important is each characteristic below? QUESTION IS A GRID WHERE: 1 = Not at all important AND 10 = Extremely important.



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CERTIFICATION RECOGNITION AMONG ALL SHOPPERS 2019-2023

Table 8. Which of the following certifications are you aware of and at least somewhat familiar with when it comes to food? When you are deciding what foods to buy for yourself or your family, how important is each certification below? QUESTION IS A GRID WHERE: 1 = Not at all important AND 10 = Extremely important.

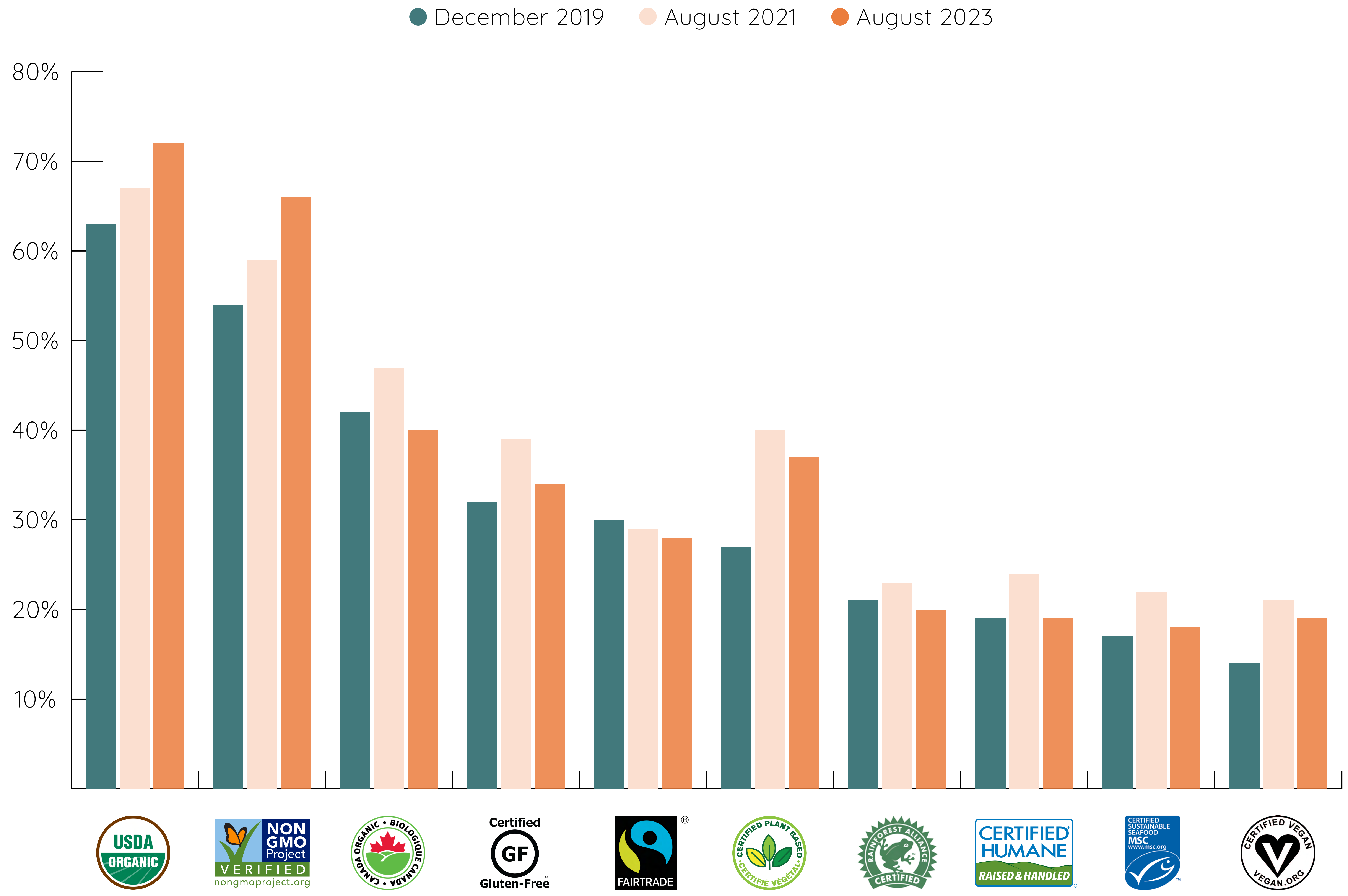

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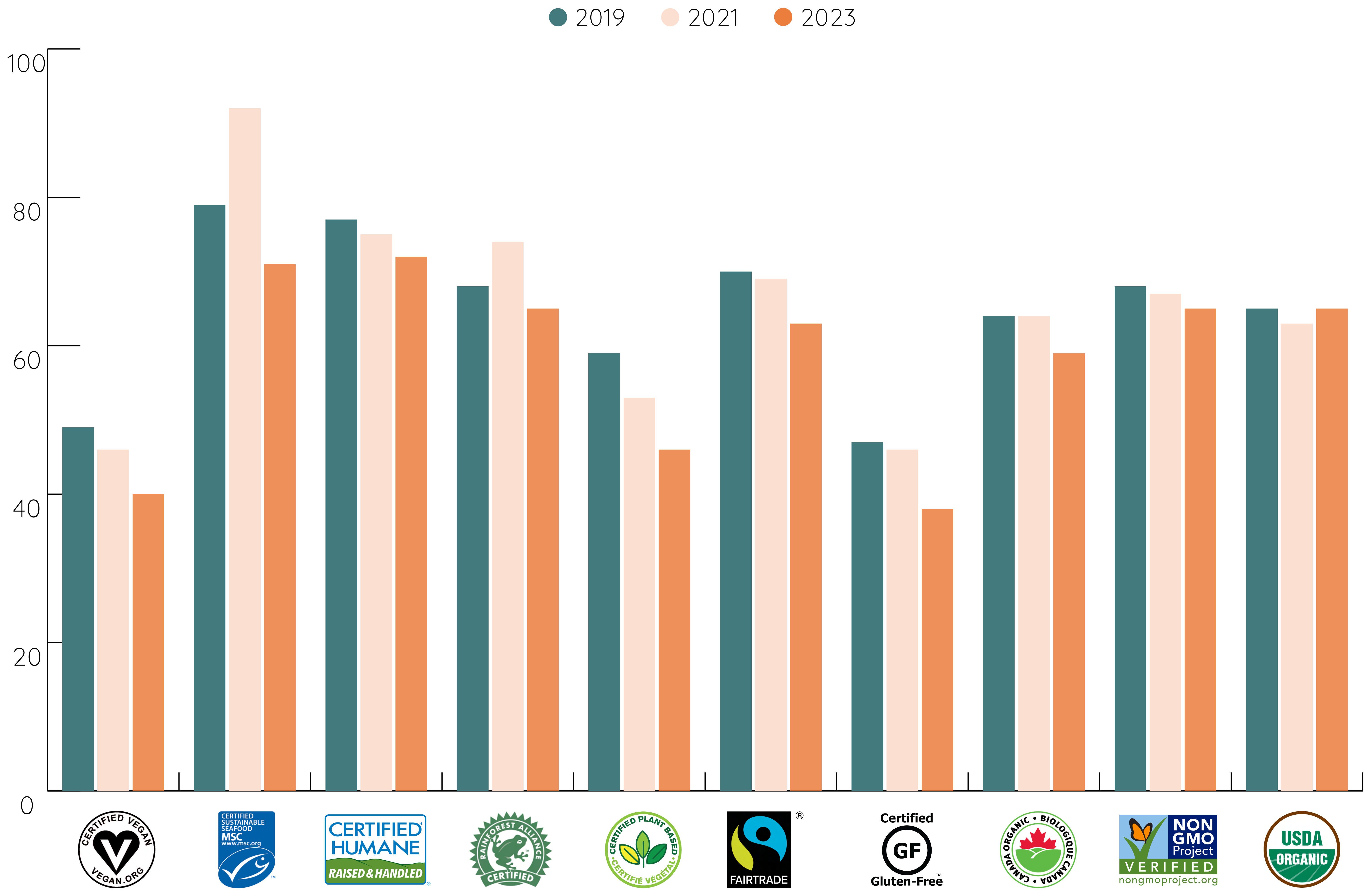
Table 8.1 Certification marks shown to survey participants. Top 10 are shown in Tables 8 and 9.

In a separate survey question, we asked shoppers if the presence of a third-party certification influenced their decision to purchase a product, setting aside the question of whether they considered a certified attribute "important" but whether it nevertheless positively drove purchase. Here, it became apparent that where awareness is established, other less common certifications highly influence purchasing decisions, such as Certified Humane, Fair Trade Certified and Rainforest Alliance (Table 9). Just so, two-thirds (65%) of all shoppers self-report that they are more likely to buy a product if it is certified USDA certified organic or Non-GMO Project Verified.



When Recognized, Certifications Drive Purchase Preference

Table 9. When you see the certifications below on food packaging, how does it impact your likelihood of buying the item? Selected “much more likely” or “somewhat more likely.”

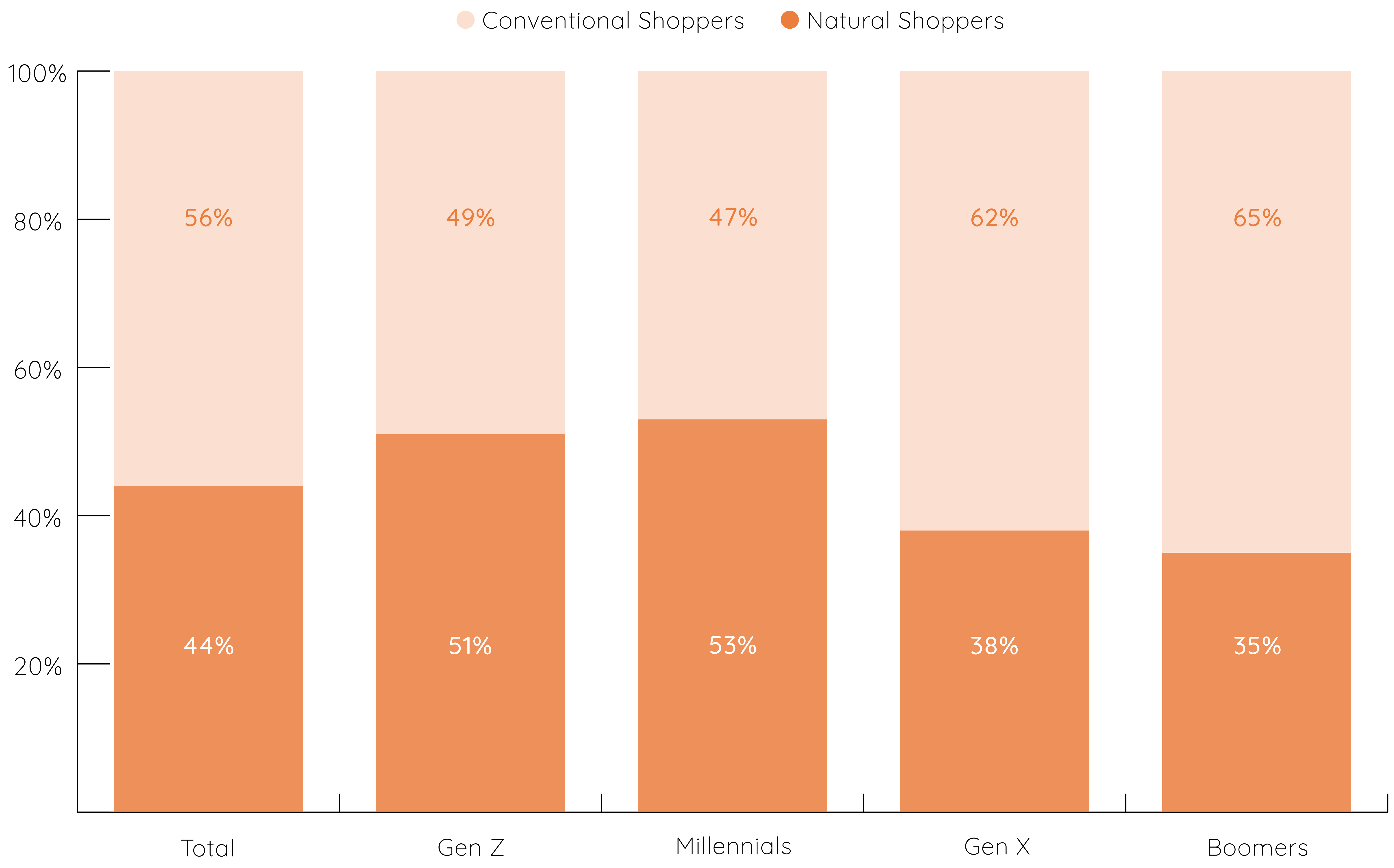
TWO-THIRDS (65%) OF ALL SHOPPERS SELF-REPORT THAT THEY ARE MORE LIKELY TO BUY A PRODUCT IF IT IS CERTIFIED USDA CERTIFIED ORGANIC OR NON-GMO PROJECT VERIFIED.

Generational Shifts

For the first time in our annual survey, we created a cohort of Gen Z shoppers to understand to what degree this generation could be expected to align with established shopping preferences of previous generations. We found that a majority of adult Gen Zs who are now regularly shopping for themselves or their households align with natural shopper attitudes as previously discussed (35%) and tend to share similar attitudes and preferences as millennials (See Tables 10, 11).

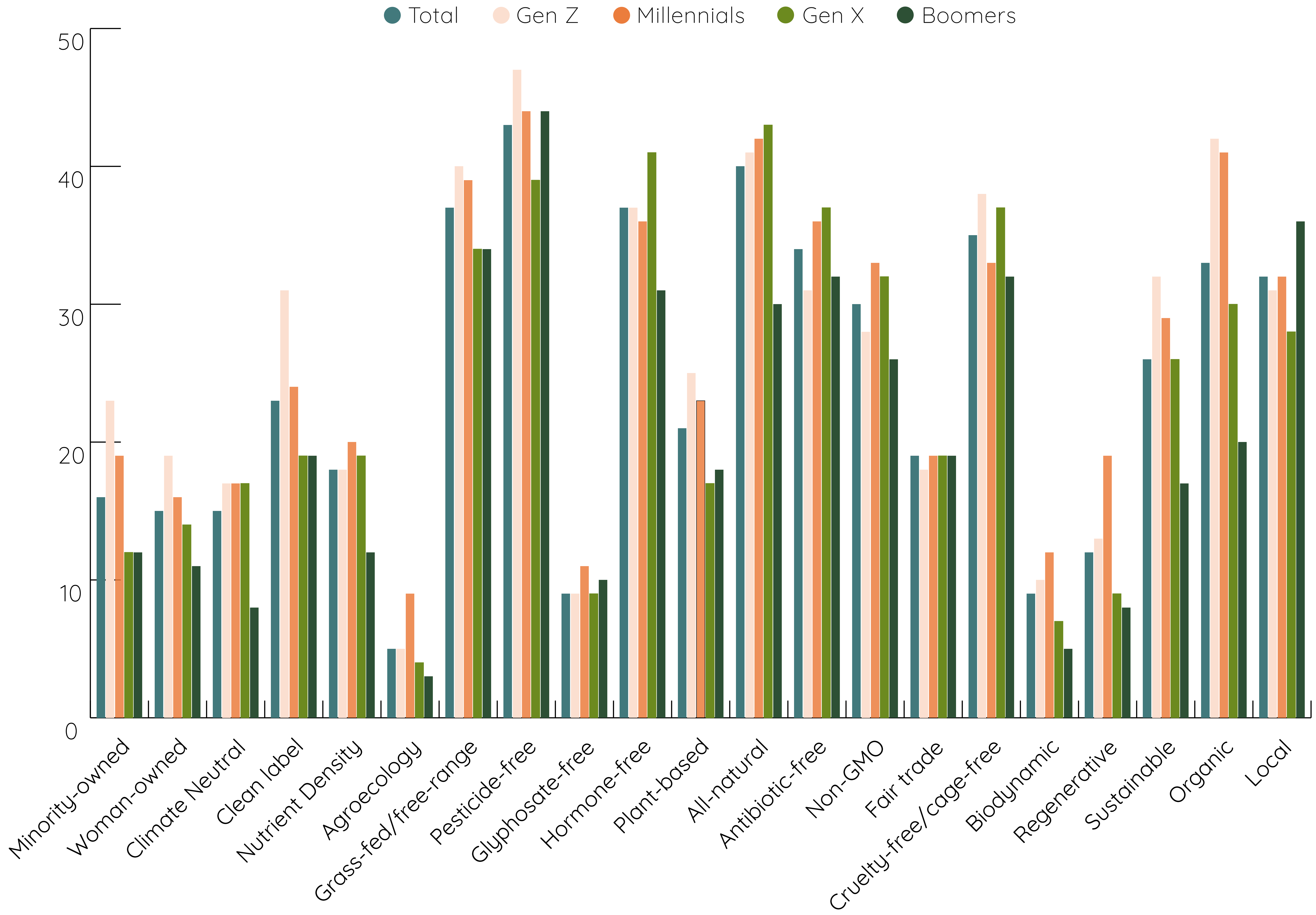
Natural vs. Conventional Shoppers by Generation

Table 10. Percent of all adults falling into two natural shopper segments vs. those falling into conventional shopper segments. Gen Z survey limited to adults age 18-24 (N=103).



GEN Z TRACKS TO PREVIOUS GENERATIONS ON NATURAL ATTRIBUTES

Table 11. Percent of all adults saying the attribute is important, by generation. (RATED 8/9/10 OUT OF 10) When you are deciding what foods to buy for yourself or your family, how important is each characteristic below? QUESTION IS A GRID WHERE: 1 = Not at all important AND 10 = Extremely important.



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At the same time, our survey documented two important shifts among millennial shoppers, leading some (about 6%) to shift away from natural products. We speculate that on the one hand, they are feeling financial pressures from post-pandemic student loan repayment while not yet reaching their peak professional income, while also starting young families. On the other hand, their status as tech-native and pro-science may make them more open to biotech solutions in food systems. This small shift manifests in a slight decrease in the number of millennial natural shoppers who are willing to pay a higher premium for natural products, including USDA certified organic and Non-GMO Project Verified.

However, this shift may be offset by Gen Z. It appears that many Gen Z natural shoppers take a more cautious and holistic view of the value of natural products for personal, environmental and social well-being, and it's showing in their shopping preferences. This may be because they report a higher level of concern for their emotional and mental health, citing concerns like anxiety, stress and depression (Table 12). Like millennials, they are likely to eventually feel financial pressures with higher food prices coupled with steep student debt in the future. For now, though, they are deeply interested in natural products that are organic, local and non-GMO. Gen Z index higher than any other generation in terms of being strongly influenced to purchase products carrying either USDA certified organic or Non-GMO Project verification (79% and 71%, respectively, Table 13). And more than any other generation, they are interested in products that are created by women and racial or ethnic minorities (Table 11).

Health Issues Reported by Generation

Table 12. How would you rate your overall health? Which, if any, of the following health conditions are you managing? Highlighted cells indicate where Gen Z over indexes all other generations. (n=457)

	Total	Gen Z (18-24)	Millennials (25-39)	Gen X (40-59)	Boomers (60-74)
Healthfulness					
Excellent/very good	46%	57%	49%	44%	32%
Excellent	11%	17%	15%	7%	7%
Health Conditions (self-reported)					
Overweight	28%	25%	22%	29%	36%
Anxiety/Stress	41%	61%	46%	38%	19%
Headaches	26%	39%	31%	23%	14%
High blood pressure	27%	12%	14%	35%	44%
Chronic join pain	17%	9%	10%	22%	27%
Environmental allergies	19%	28%	20%	15%	14%
Depression	26%	32%	28%	28%	15%
Frequent heartburn/reflux	12%	7%	14%	14%	12%
Diabetes	7%	4%	5%	8%	13%
Osteoporosis	4%	1%	0%	2%	14%
ADHD/hyperactivity	10%	22%	5%	11%	2%

Impact of Certification on Purchase by Generation

Table 13. Gen Z over indexes other generations on certifications' influence to purchase. : When you see the certifications below on food packaging, how does it impact your likelihood of buying the item? QUESTION IS A GRID WHERE COLUMNS ARE: makes me much more likely to buy, somewhat more likely to buy, no impact, somewhat less likely to buy, much less likely to buy. How much of a premium, if any, would you be willing to pay for products with the Non-GMO Project certification? How much of a premium, if any, would you be willing to pay for products that are labeled with the word "non-GMO".

	Total	Gen Z (18-24)	Millennials (25-39)	Gen X (40-59)	Boomers (60-74)
Impact of Certification on Purchase					
USDA Organic	67%	79%	68%	68%	53%
Non-GMO Project	66%	71%	67%	67%	66%
Willingness to Pay a Premium for Non-GMO					
Non-GMO Project Verified	58%	69%	71%	71%	39%
Self-made non-GMO claim	51%	63%	66%	66%	35%

In summary, we believe once the entire Gen Z cohort is of shopping age (many are still under 18), it will likely be the "greenest" shopper yet, in part because of a more expansive view of natural attributes and their connection to broad sustainability issues from climate change to racial equity to animal welfare. They also show deep interest in the nutritional quality of natural foods and are helping drive an emergent attribute that may be the most important "connective tissue" in showing one outcome of the "virtuous cycle" of natural food systems: the nutrient density of fully regenerative food systems, *(i.e., food that nourishes all life)*.

Emerging attribute: Nutrient density and "the natural intuition"

The increasingly holistic approach to understanding health as both personal and planetary has led to a refinement of an idea that has always been core to natural products. This idea, driven by the natural intuition, is that good food is healthy and makes you feel better. For more than 50 years, the "health food store" serviced this intuition, and today, there is an upswing in research showing the scientific evidence that confirms it. Regenerative, organic, non-GMO and even humane animal treatment have proven that holistic natural systems can not only produce food that is better due to the absence of things like toxic chemical residues and antibiotics but that these production methods tend to create a virtuous cycle of rebuilding resources like soil health and on-farm biodiversity as well as more wholesome foods.

One of the emerging insights of this virtuous cycle is food that may be more nutrient dense — that is, calorie for calorie, creating ingredients that carry more nutrient quality and fewer "empty" calories. Other factors of production also play a part, such as the use or avoidance of ultra processing, highly refined oils or sugars, and so on. Broadly speaking, it is possible for whole foods produced in optimal natural conditions to be more dense with nutrients, and our research shows that shoppers are interested in learning more. Coupled with what we identified earlier as financial pressures on all shoppers, natural segments may look at the opportunity to buy more nutrient-dense foods as getting more "bang for their buck" when grocery shopping – not just in nutrient density but in the area of positive and preventative health outcomes at the personal level. An added bonus is the positive outcomes for social and even planetary sustainability.

Nutrition vs. nutrient density

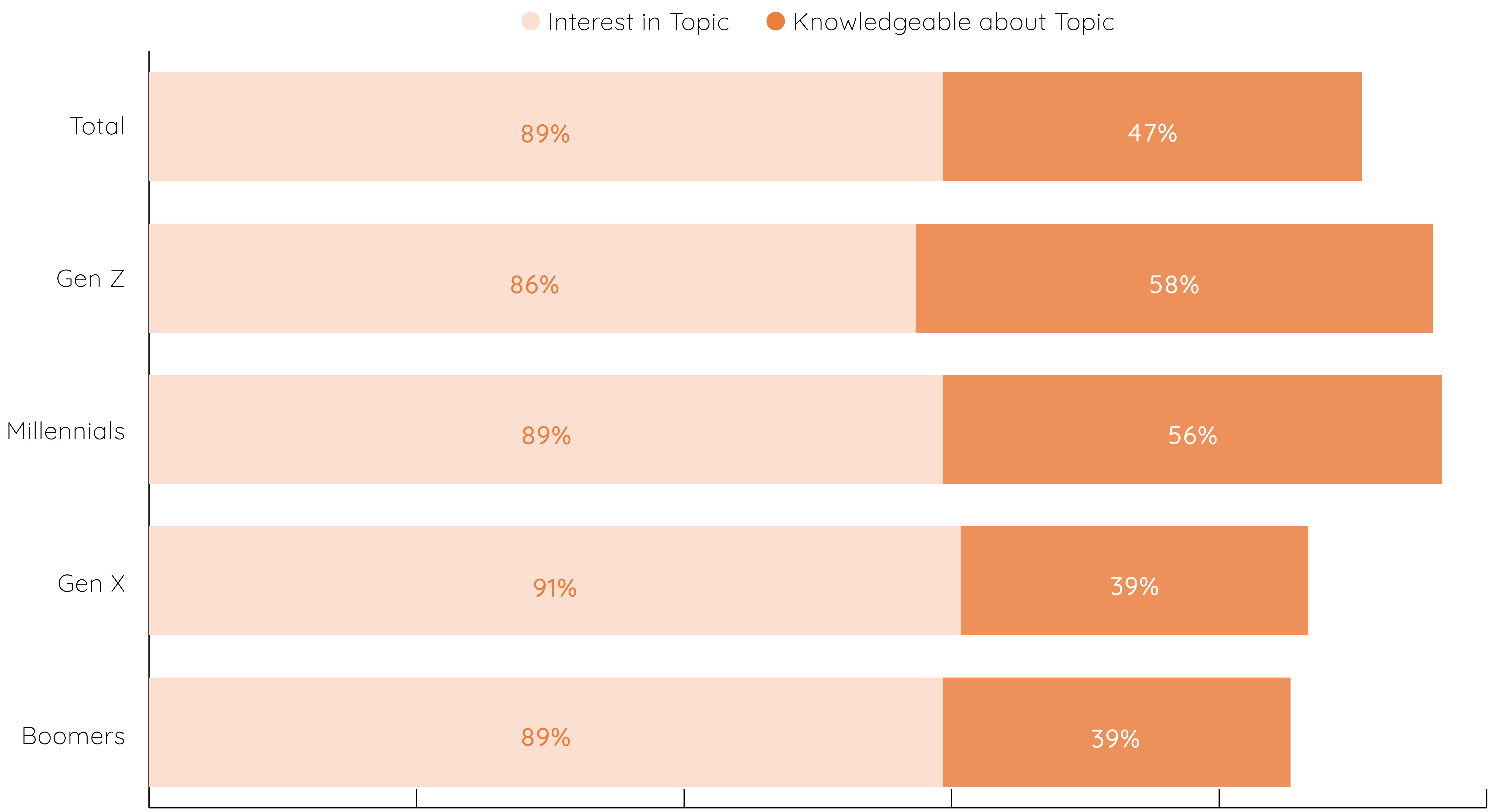
It is interesting to note that shoppers across all generations, regardless of whether they fall within a natural shopper segment, rate nutrition as a topic in which they are most interested – with nine out of ten saying they are very or somewhat interested in nutrition (Table 14). About 50% consider themselves knowledgeable about it. However, there is less familiarity with the more specialized, emerging topic of nutrient density (Table 15), defined roughly as the ratio of nutrients to calories, but potentially including millions of previously unfamiliar micronutrients. Nutrient density can occur in different levels for different types of food. Our research found that less than 20% of shoppers consider themselves knowledgeable and yet nearly three-quarters (73%) are interested in nutrient density. This suggests a tremendous opportunity to 1.) learn more about nutrient density, 2.) offer accessible education to shoppers, 3.) formulate more nutrient dense foods, and 4) promote nutrient density as a meaningful new attribute that the natural products industry is well positioned to grow. As previously noted, Gen Z over indexes compared to other generations for awareness of, interest in, and eagerness to learn more about nutrient density.

To reiterate, we believe interest in nutrient density is primarily intuitive: Shoppers simply “feel” that nutrient density is a good thing, but they don’t presently have a lot of knowledge about it. Indeed, nutritionists are only beginning to uncover many of the mysteries of micronutrients and phytonutrients, the negative impacts of ultra-processed foods, and the connections between soil biomes, gut biomes, mental health, and so on.

People are innately aware that food comes from nature, and the more “direct” the pathway of production and distribution, the better it is for the body.

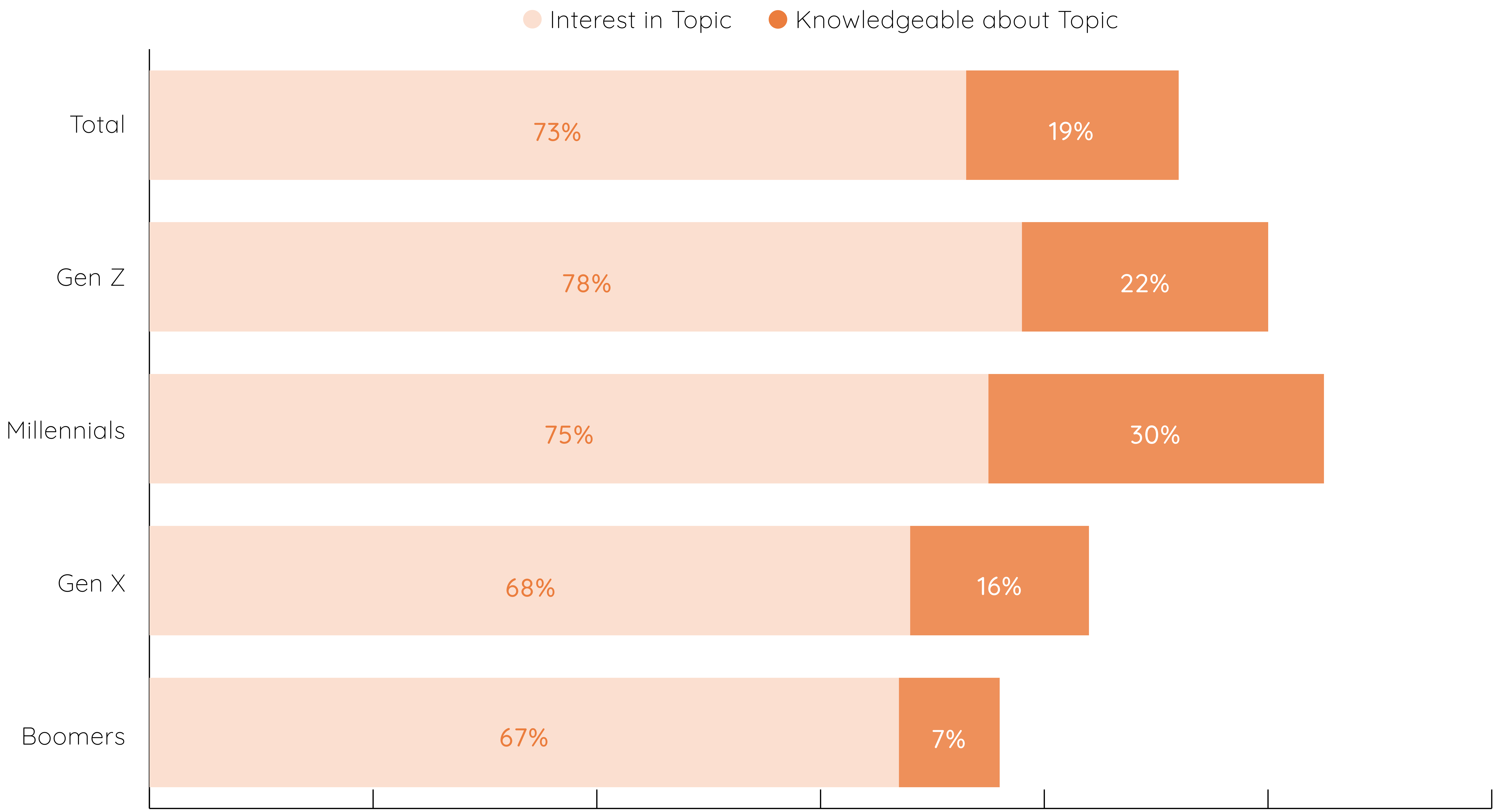
“Nutrition” Interest vs. Knowledge

Table 14. How would you rate your knowledge of the topics below? SCALE IS: extremely knowledgeable, very knowledgeable, somewhat knowledgeable, not knowledgeable at all. How would you rate your interest/curiosity in the topics below? SCALE IS: very interested / curious, somewhat interested / curious, not interested / curious.



“Nutrient Density” Interest vs. Knowledge

Table 15. How would you rate your knowledge of the topics below? SCALE IS: extremely knowledgeable, very knowledgeable, somewhat knowledgeable, not knowledgeable at all. How would you rate your interest/curiosity in the topics below? SCALE IS: very interested / curious, somewhat interested / curious, not interested / curious.



Key insight: holistic innovation

The natural shopper is growing younger and more expansive in their preferences for attributes that serve sustainability in every conceivable way – nutritionally, ethically and environmentally. The natural products industry is uniquely positioned to provide the natural shopper with innovative product formulations and regenerative ingredient sourcing. This maps directly to both established and emergent natural attributes.

There is foreseeably a point of convergence where a truly holistic, regenerative, organic and non-GMO food system produces the "virtuous cycle" with an optimum number of positive outcomes for all life on Earth, from the microbiome and rhizosphere of living soil to the health of human bodies and communities, all flora and fauna, and even the planetary ecosystem that faces the existential crises of climate change and loss of biodiversity. Food is at the center of all of these systems. Shoppers will increasingly have the opportunity to support that system led by the innovations of the natural products industry.