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XX. 'Advisor for healthy life': Supermarkets as new food authorities

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INTRODUCTION

Consumers everywhere are familiar with news stories reporting 'David and Goliath' struggles between small, owner-operator, small-scale, local food shops and the major supermarket chains. In Australia, the most recent take-over target is the suburban chemist shop, with supermarket chains lobbying governments to be permitted to establish stand-alone and in-store pharmacies. The slogan included in the title to this chapter – 'Advisor for healthy life' – was adopted by a supermarket near Osaka, Japan, and encapsulates a trend among supermarkets worldwide to position themselves as much more than food traders. The desire by supermarkets to add pharmaceuticals to their current portfolio of groceries, fruit and vegetables, home meals, fresh baked goods, meats and fish, and alcoholic beverages is at one level unremarkable. However, rather than the relatively effortless absorption of the operations of skilled providores such as butchers, bakers, grocers and wine merchants, the supermarkets are being met with the active resistance of a reputable professional body, the Pharmacy Guild of Australia. Recently the Guild and the Australian federal government signed an agreement protecting pharmacies from supermarket owned chemist shops for the next five years (West 2005).

These latest expansionary designs highlight the transition by supermarkets from single enterprise corporations to conglomerates whose business is no longer confined to food retailing. Supermarket chains often own and manage farms and logistics centres, produce food items either in their own kitchens or under contract to outside suppliers; they also manage food laboratories and serve as quality assurance agencies (Delforce et al. 2005). They are emerging as major players in petrol distribution and the supply of entertainment needs including books, film, music and computers (Harris 2005). Additionally, they offer dry-cleaning and photographic services, sell office supplies, clothing and footwear items, beauty products, gardening and home wares, and pet care products.

In Australia, the market control and cultural influence of supermarkets is not related simply to the size and extent of their operations, but also to the concentrated nature of the industry. In a government review of the key issues confronting Australia's food industry, the lack of competition was noted, particularly in the provision of retail and wholesale services. Concern was also expressed about 'rapid industry rationalisation and integration across the supply chain and the impact that these developments might have on small producers and processors' (Delforce et al. 2005). In Australia, as elsewhere, supermarkets dominate the food retailing sector, accounting for 62 percent of food and liquor sales in 2003-04. However, while such relative dominance is common place, the levels of industry concentration in the 50 to 70 percent range is generally reached in other OECD countries by aggregating the sales of the five largest retailers. In Australia, the 70 percent level is reached by just two supermarket chains, Woolworths and Coles (Delforce et al. 2005; USDA 2004).

Despite a critical press and regular government enquiries into market concentration, supermarkets in Australia continues to increase their market share, and it is tempting to ask how one institution could become so dominant in the everyday lives of so many groups in society, ranging from primary producers, manufacturers, small retailers, distributors, technology manufacturers and suppliers – as well as all who shop. A few years ago, I argued that the power of supermarkets over producers and consumers was due to their transformation in status from commercial company to food and lifestyle authority (Dixon 2003). The supermarket-versus-pharmacy-guild episode, noted earlier, supports the central argument: that well-established, traditional authorities (government, professional bodies, the church) are being displaced by a new type of market authority, based in charisma and claims to expert authority, often gained through third party association. Using examples of supermarket partnerships with bodies such as the Dietitians Association of Australia, I explained how supermarkets were positioning themselves as legitimate health promotion authorities. Clearly, associations with the pharmacy profession would serve a similar function. The presence of in-store clinically robed chemists aligns the commercial enterprise with the moral economy of the health care sector, and consolidates the credibility of the supermarket as a health authority. Ironically, part of the guild's objection to supermarket involvement in their industry stems from the negative symbolism of being allied 'with a company whose top selling products include cigarettes' (Anonymous 2005 p. X?).

By appropriating the mantle of health authority, supermarkets position themselves as trustworthy. From this platform they can work to shape the context in which consumers make other decisions about consumption practices. Not only do supermarkets strike formal (although not necessarily written) contracts with producers, they enter into informal 'accords' with consumers. These latter agreements take the form of lifestyle conventions, whereby supermarkets – proactively but subtly – advise households and individuals on a host of qualities including convenience, cleanliness, thrift and family nutrition. By guiding consumers towards an idea of 'how to live the good life', they shape individual lifestyles and consumer cultures as surely as the mass media, the education system and the church.

The relationships/partnerships being forged between supermarkets and suppliers receive attention in Chapters XX and XX. Those authors provide ample evidence of the extent to which retailers work to shape the regulatory framework by establishing and policing standards of food production. This chapter, by contrast, focuses upon the strategies used by supermarkets to shape the standards and conventions adopted by consumers to regulate their food consumption behaviours, including how and when they shop, how they view 'value-for-money', what qualities matter to them, and how they feel about life more generally.

This chapter begins by synthesising the argument which suggests that supermarkets have entered the twenty first century as significant authority figures. It proceeds to describe the mechanisms supermarkets use to forge 'relationships' with consumers, focusing on two strategies. The first of these aims to establish a loyal following of repeat consumers willing to spend more than they otherwise would, and the second seeks to culturally mark the supermarket institution as a guide and guardian. Extending Bourdieu's (xxxx) theory of capital accumulation and conversion from individuals to institutions, the chapter concludes with a discussion of the capital switching activities of supermarkets, focusing on the way in which they accrue and convert their own cultural, symbolic, social and economic capital.

SUPERMARKETS AS AUTHORITY FIGURES

Over many decades, supermarkets have emerged as an institutional authority, a status achieved through a strategic layering of multiple, well-established, forms of authority: traditional, bureaucratic and charismatic (Dixon 2003). To these representations, they have added 'local'. Not only does the product range on offer in stores differ according to the locality, being aligned with consumer socio-economic status, but also store managers have come to be very receptive to requests for support of community events and functions. In this way, they augment (and in some instances, possibly displace) the bureaucratic local government body which usually provides services to local communities. Table 1 describes the types of attributes supermarkets project and the practices they adopt, which together deliver market-based authority status.

Table 1: The bases for supermarket authority

Traditional Authority	*Attributes:* They have a history (at least eight decades old); a dominant presence (large, multi-site edifices); an indispensable presence (supply food and other everyday goods/services); a trustworthy reputation. *Practices:* They form partnerships with third parties, which already have some form of traditional authority (health authorities; professional groups; government); they offer 'free' advice (recipes, food safety tips, nutritional information); they promote thrift through value-for-money promotions.
Bureaucratic Authority	*Attributes:* They are large institutions with Codes of Practice and avenues for complaint; accountable to shareholders and consumer watchdogs. *Practices:* They devise and police food production standards; they implement the regulations set by producer groups or farm associations.
Charismatic Authority	*Attributes:* They project a personality through use of symbols and public communications; are bright, colourful and loud. *Practices:* They use product portfolios, store amenity and style of operation (service versus price focus) to confer status upon shoppers; they form partnerships with other charismatic figures, such as celebrity chefs; they drive innovation in product lines, store layout, services.
Local Authority	*Attributes:* Store location and car park size, plus employment of local people, mean domination of the physical and social landscape. *Practices:* They tailor product portfolios to local circumstances, hire local employees and provide practical support to local groups and 'good causes'.

By virtue of their authority status and market dominance, supermarkets exercise considerable cultural economy power in the agri-food system, as well as a growing array of other commodity systems. However, the acquisition and use of this cultural economy power does not come easily. In Australia, the UK, and elsewhere, this power is under constant scrutiny from consumer associations, producer groups, small retailer associations, and government regulators. In Australia, there is anecdotal evidence that suggests that consumers are returning to small food retailers in their quest to obtain fresh food (Warner 2005). In the UK, the organic sector, in particular, has benefited from consumer disappointment at supermarket offerings and the conscious pursuit of health through food. Although, in recent years, the supermarkets themselves have become the main suppliers of organic products, an analysis of the UK organics market by the Soil Association showed that British consumers identified supermarket organics with unwanted food miles, packaging, and provenance, due often to their imported nature. As a consequence, supermarket sales were falling, while sales through box schemes, farm shops, and farmers' markets were increasing (Lawrence 2005). In Australia, organics superstores are emerging with rooms for naturopaths and nutritionists (Lawson 2005). Clearly, any trend to buy 'health' in the form of organics from sources other than the supermarkets undermines supermarket positioning as a health authority, and will be an obvious target for supermarket effort in the coming years.

Resistance to supermarkets also arises periodically from communities unhappy at the ways in which the large edifices swamp the social and physical landscape (Dunckely 2005; Needham 2003; Simms 2003). This resistance surfaces as opposition to the 'Wal-Mart effect', which arises from shared perceptions that one institution should not be able to dictate consumer choices, the working lives of suppliers and employees, and those of competitor businesses. Indeed, supermarkets are beginning to be accused of contributing to all manner of social and environmental problems, as illustrated by an opinion piece in a leading Australian newspaper. In dismissing Wal-mart's decision to reduce its carbon emissions by 20 percent, this writer observed:

> …the point is supermarkets are over. We cannot have such long supply lines between us and our food. Not any more. The very model of the supermarket is unsustainable, what with the packaging, transport distances and destruction of national farming sectors. Small, independent suppliers, processors and retailers or community-owned shops selling locally produced food provide a social glue and reduce carbon emissions (Newman 2006, p. 11).

While it seems a little premature to signal the end of the supermarket model, nevertheless such antipathy needs to be countered by the supermarkets if they are to maintain their position within the modern agri-food system. Supermarkets currently face a triple challenge to their authority. The first relates to consumer loyalty to their favourite store and chain; the second concerns loyalty to the industrial food system; and the third relates to community loyalty to the institution of the supermarket. The following section focuses on three mechanisms used to enter 'relationships' with consumers, with the aim of fostering loyalty in the three domains.

RETAILER-CONSUMER RELATIONSHIP STRATEGIES

A prerequisite for being a retail trader which is successful over the long-term is the ability to forge and maintain relationships with customers. One of the major assets of small, family-owned and neighbourhood-oriented retailers was their capacity to *know* their consumers, their likes and dislikes, their willingness to pay and their propensity to complain (Evans 1999; Humphery 1998; Kingston 1994). It was on the basis of familiarity with their customers that these stores were willing to offer valued services, including home delivery and store credit (Oi 2004). With the advent of modern self-service and mass retail formats, retailers had fewer opportunities to communicate directly with individual shoppers because service was provided on an anonymous basis by an army of staff on rotating shifts. In the present era, it seems that this reduced personal contact may suit most consumers who no longer have the time, inclination or confidence to exchange pleasantries over the counter (Dixon et al. 2005).

However, with the modern retail form giving way to virtual retailing and with increased retail competition, supermarkets are faced with an even greater problem in forging relationships between themselves and their existing and potential customer base.

> The development of customer loyalty and retention is an inimitable resource for the organisation as retail loyalty is becoming increasingly harder to attain due to higher customer switching activities (Dixon et al. 2005, p. 351).

With the advent of Internet shopping, where customers no longer have to be present at the time of the transaction, a revolution in food retailing is taking place.

> [P]rogressive shifts towards self-service – pick and carry your own, pack your own and even scan your own…(are disappearing)…With HomeShopping, this understanding of the grocery business, and individual roles within it, has been upturned. Now it is the retailer that does all the work of picking, packing and carrying for the consumer (Murphy 2002, p. 58).

As the nature of retailing is being transformed, the retailer has to continue to invest in securing the relationship between itself and the customer. Thus it is no surprise that contemporary supermarket discourse includes a theme which emphasises ‘relationships’. Humphery (1995, p. 34) describes relationship marketing as ‘selling by forging a ‘human’ rather than simply [a] commercial link between retailer and individual customer’. Forging such links takes considerable market intelligence and a multi-pronged strategy. What follows is a description of three major relationship marketing tools currently being deployed by Australian supermarkets as they seek to establish themselves as authoritative voices amongst the consuming public.

Loyalty Schemes: Building Loyalty to a Chain or Store

Consumers in the 1950s and 1960s were extremely loyal, insofar as they tended to be repeat customers who spent a large proportion of their money in the one store. With the 1970s mantra of choice, ironically the by-product of supermarket marketing, consumers became empowered to ‘shop around’. So much so that for the last decade, supermarkets and other industry groups, such as petrol retailers and airlines, have spawned ‘the science of customer loyalty’. This is a science that uses data about consumers to encourage their retention and commitment to the store in the face of stiff competition. As the author of *The Customer Loyalty Report* noted: ‘A loyalty programme helps segment and reshape the profile of the customer base, an essential task if marketing spend is to be directed mainly at the best customers’ (Clark 1997, p. 146).

Loyalty schemes not only provide supermarkets with a wealth of data, they also have the added function of promoting a psycho-social bond with the consumer. They embed the firm within the social life of the consumer while symbolising the virtue of reciprocity: of rewards for those who tie their allegiance to the one store or chain. The knowledge gained through loyalty programs is integral to the overall retail positioning approach adopted by the retailer, and to its capacity to set itself apart from competitors through distinctive retail formats and product portfolios. The literature addressing ‘retail positioning’ describes it as a four-part activity: merchandise decisions (branding, core–peripheral merchandise); store format/environment decisions (design, ambience, location profile); customer service decisions (number of facilities, personnel services); and customer communication decisions (advertising, public relations, promotions and visual merchandising) (Devlin et al. 2003).

Analyses of modern markets emphasise that positioning activities must ‘fit’ the retail experience with consumer expectations. Working from a consumer behaviour perspective, Devlin and colleagues examined the underlying motivational reasons behind British consumer’s choice of supermarket chain, encouraging respondents to consider the links they make between store attributes and desired end-states (Devlin et al. 2003). The study’s respondents selected a store on a mix of concrete factors (relating to store layout, services and offerings) and abstract values (including the most important attribute ‘value for money’, ‘good quality products’, and ‘good reputation’). When asked to consider the most important ‘end-values’ associated with food shopping, respondents most often recorded ‘happiness’ and ‘quality of life’, followed by ‘financial security’ and ‘high self-esteem’. The researchers concluded that ‘food retail positioning strategies should be focused on emphasising the fact that the retail offer can act as a vehicle for the attainment of personally relevant end states of existence for consumers’ (Devlin et al. 2003, p. 668).

The business motivation to encourage loyalty in consumers is two-pronged. First, it is to extract as much share-of-wallet as possible: a supermarket’s ‘most loyal customers’ have been estimated to be ‘around 1000 times more profitable than its least loyal’ (Clark 1997, p. 146). Second, it is to continue to refine the chain’s position relative to its consumers. Investing in loyalty schemes has a range of purposes – customer acquisition, customer retention, increased basket size, willingness to pay premium prices, and enrolling new customers through referral (Clark 1997). The rewards offered in the programs take many forms: discounts, prizes, saving schemes (whereby points accrue and are redeemed on goods and services in-house or from another company), to higher levels of service as with frequent-flyer programs.

In Australia, the two sectors that have led the design and application of loyalty programs are supermarkets and petrol retailers. Together, they have established a retail partnership offering another loyalty device, the shopper docket scheme or retail bundling. In Australia, the bundling of petrol and groceries extends across three of the major supermarket chains and two of the four major petrol companies, although there are some variations in arrangements. Coles is allied with Shell company, while Woolworths is allied with Caltex and Woolworths’ own petrol brand outlets, Petrol Plus. In each instance, customers who purchase more than $30 worth of groceries receive a discount of four cents a litre on petrol purchases made at an allied petrol station.

Such brand-specific bundling is thought to have the same effects – both positive and negative – as big name loyalty programs. This type of operation precludes smaller operators – in this case independent petrol retailers and grocery outlets – from benefiting. In addition, the benefits to consumers who have to travel long distances to cash in their dockets or who do not avail themselves of the discounted petrol are negligible. Gans and King (2004), who have studied multi-vending schemes in the Australian context, also argue that consumers who do make use of the deal are potentially captive to price rises by either or both of the businesses being bundled. They note that firms become very sensitive to price rises by the partner firms, because a price rise in either business can send customers into the arms of an alternative bundling partnership. For these reasons, Gans and King (2004, p. 312) conclude that 'as this practice spreads, such bundling may result in considerable loss of consumer welfare and a long-term erosion of competitive pressures in the relevant industries'.

In effect, the lack of capacity by new entrants to the bundling exercise acts as a barrier to competition. To compete, existing unallied firms have to lower their prices and margins (Gans and King 2004; Leenheer et al. 2002). The initial R&D investments in loyalty programs are substantial and, as a result, the already highly concentrated supermarket and petrol industries are expected to become even more concentrated as existing players who cannot offer bundling suffer a decline in profits, and exit. In this regard, the Service Station Association has complained to an Australian Parliamentary review of petrol pricing, that independent petrol retailers will be unable to compete with the petrol outlets allied with a supermarket, and that petrol prices will rise as a result (Roarty and Barber 2004).

While the relationship between programs and profit margins is contested, loyalty schemes of this type appear to be worthwhile for the largest firms (Gans and King 2004; Leenheer et al. 2002). But short-term profiteering may incur longer-term pain. Despite the sophistication of today's loyalty programs, program members can be highly 'disloyal'; they shop opportunistically, have numerous loyalty memberships and may be cynical about the program (Bellizzi and Bristol 2004). This last factor in particular undermines the trust that the loyalty programs are designed to build. Factors militating against one-store loyalty are based largely in socio-economic privilege, with the more mobile and cashed-up consumers prepared to exploit numerous channels to meet their status and other requirements that accompany the shopping experience.

Hitherto, loyalty programs have been less influential than supermarkets had hoped, in building and maintaining loyalty. As they evolve, their impact on the bottom line will be closely monitored. Ironically, the widespread emphasis on buying loyalty through discounting and coupons makes it harder for companies to use price as a tactical weapon. It also engenders 'promiscuity in loyal customers who go through brand loyalty switches: changing brand partners to whoever offers the most enticing bribe' (Evans 1999, pp. 3-4). Despite evidence of a degree of cynicism among the consuming public, practitioners of the 'science' of loyalty believe that 'it is possible to make customers more loyal' (Clark 1997, p. 146). Using the large quantities of information that are available on each individual program member, it is possible to target individual consumers, for example by tailoring discounts to match past buying patterns of any particular individual. Customers are assigned to a cluster of attributes – convenience shoppers, reasoned shoppers, casual price shoppers and dedicated price shoppers – for the purposes of communication, the aim of which is to move them into the most profitable category, in this case reasoned shoppers who care about qualities other than price. Importantly, this is the market niche that all chains aspire to serve.

Installing trust: building loyalty to the industrial food supply

'Promiscuous' attitudes towards product brands, loyalty programs and supermarkets are constantly being countered by a range of established and new techniques to build trust in a brand and a supply chain. To illustrate how trust can 'be installed' between sellers and buyers using relationship marketing, Lindgren and Hingley (2003) undertook a case study of the Danish-British bacon supply chain after the UK's experience of a number of major food scares, including 'Mad Cow Disease'. Based on a scheme that identified four types of trust, he documented the steps taken within this particular supply chain to allay consumer concern about animal welfare and product safety.

Lindgren found that the companies under study strategically mobilised different forms of trust – generalised trust, system trust, process-based trust and personality-based trust – as circumstances dictated. First, they used mass advertising to extol the virtues of their brand, and they combined this with on-pack rewards to regular customers. Second, they strengthened their supply chain arrangements to more fully reflect best practice in food safety, and communicated this to consumers. In this way, they made use of 'system trust', or the codes of practice and other regulations enshrined in legislation. At this point they instituted a help-line to respond to consumer complaints and queries. Third, they turned to a personality-based trust approach, offering consumers competitions, free in-store samples and recipes to inspire consumers. The companies spoke of their intention to move to direct mail communications with customers to reinforce the importance of the personal relationship between the consumer and the company, thereby operating a form of personality-based trust. Put together, these 'trust installing' activities performed additional functions; they promoted the image of the company, educated consumers, and built relationships and networks with different markets (Lindgren and Hingley 2003, p. 323).

What was notable about the Danish case study was the symbiotic relationship between the regulatory machinery governing the actions of producers and processors, and the standards and conventions binding consumers to supermarkets. To operate trustworthy supply chains, supermarkets must use their finely-honed relationships with producers and consumers to control the qualities of what is produced and what is consumed. However, according to the research team which studied the basis for Australian consumers' future store choices in relation to hardware supplies, trust is a multi-faceted quality containing the seeds of its own destruction. Based on their survey results and a synthesis of related findings, they noted that trust does, indeed, influence consumer commitment to shop in one store rather than another; but, as in personal relationships, commitment entails vulnerability (Dixon et al. 2005). Once the trust is lost, the vulnerable party will take some convincing to trust again. This is the conundrum for the supermarket sector; if it is perceived not to be dependable, competent, or to value consumers more highly than profits (the planks of a trust in retailing, according to Dixon et al. 2005), then customers will gravitate to other retail forms.

Guide and Guardian: Building Loyalty to the Supermarket Institution

A few years ago, the author of the Loyalty Paradox Report (Evans 1999, p. 4) criticised existing loyalty programs for being 'mechanical, hard sell promotions', which overlooked the reasons for repeat customers – 'emotion and trust', 'habit and inertia' and 'communications and service'. There is the danger that customers will become loyal to the program itself rather than to the program sponsor.

It is clearly not sufficient to be an effective promoter of the economic benefits of loyalty program participation. There is a need to offer consumers socio-cultural benefits; to provide the ‘feel good’ factor that is missing from the shopping experience of other retailers. I would argue that this is the main reason why supermarkets are so keen to be perceived as a health promoting agency, a family friendly firm, and as a household problem solver. As the manager of a Safeway (UK) store explained some years ago; ‘Our success can be put down to our regard for our moral as well as our legal responsibilities’ (Cumming 1994, p. 5).

For this reason, analysing the subtle mobilisation of consumer loyalty towards supermarkets as an institution is as important as understanding the ‘hard sell’ of loyalty program activities and the negotiated supply chain partnerships. It is as both guide and guardian that supermarkets actively promote and regulate the social practices that underpin food consumption behaviours. For all of their history, supermarkets have been proactive in providing narratives of the ideal shopping experience, and have always sought to elevate food shopping from the mundane and tedious labour that it is, to an activity that brings additional psycho-social and economic rewards. Not only have major food retail chains painted a picture of social and economic progress, based on shopping and consumption, they have promoted particular conventions and expectations to apply to everyday life, such as convenience in shopping, meal patterns, meal types, personal relationships, and more. Retail historians point out how cleverly supermarkets have made a virtue of: dispensing with full counter service in favour of self-service; asking consumers to travel long distances for the weekly or fortnightly shop at the one store rather than opportunistic daily purchases; offering convenience products towards the back of the store in the freezer section; and providing extended shopping hours promoted as family-friendly, when that retail format robs large numbers of families of time together as teenagers and mothers join the army of casual retail labour (Gardner and Sheppard 1989; Humphery 1998; Kingston 1994). Whether the consumer trend towards ‘healthier and more lifestyle-compatible meals’ (Delforce et al. 2005, p. 382) originates with consumers, is foisted upon them, or fostered in them, is debatable.

For much of the twentieth century, citizens learned how to run a household and be a parent and a provider, through ‘hand-me-down’ advice from mothers and other family members, and from home economists, social workers, and medical and allied health practitioners. All the while supermarkets were subtly influencing the craft of being a ‘good’ mother, household organiser, wife and budget manager. Since the 1980s, they have added the art of being a ‘good’ consumer and even better, a healthy consumer. They have adopted the role of guide and guardian, or as Flynn et al. (2003, p. 42) have put it:

> …while continuing to develop their economic power as the main representatives of progress, the corporate retailers are also regarded as the main custodians of quality in the eyes of both consumers and government.

Just as supermarkets had to work assiduously over many years to convince shoppers that theirs was the superior retail format so, too, they have been working systematically on their image as a social custodian. This has taken place, in part, through the associations they have forged with valued institutions, practices, people, product and service portfolios. They have been particularly astute in offering services and products that they align with convenience and problem solving, inspiration and advice. This following cases provides good examples of some principal associations promulgated by supermarkets in Australia and the UK.

SUPERMARKETS AND ASSOCIATIONS

Valued Institutions

Among those bodies most highly esteemed in modern times, two stand out; scientists and health professionals. Any alliance forged with a health body or with medical science is extremely valuable (Dixon and Banwell 2004). Supermarket 'partnerships' with these particular sectors provide highly visible signs of supermarket duty of care, whether through the show of symbols on products (such as the Australian National Heart Foundation's tick of approval, or an organics certification), or through health promotions such as the 'Seven A Day' campaign jointly sponsored by the Dietitians Association of Australia and Coles supermarkets, designed to encourage the increased consumption of fruit and vegetables. The anticipated incorporation of chemists under the supermarket umbrella will complement such initiatives.

There are also instances of mutual advantage being sought from such alliances. While 'the Church' has had its authority undermined in the last two decades due to a host of scandals, organised religion is still widely revered. Thus the sight of befrocked chaplains and Buddhist nuns working supermarket aisles as they offer pastoral care confers as much benefit on their institutions as it does on their more secular host. Indeed, the Asda supermarket chain in Britain is receiving general approval for running

Britain's largest workplace chaplaincy scheme, with 160 chaplains employed in half of Asda's 300 stores (Smith 2005).

Valued Practices

Community concerns for a food system that respects animal welfare offers considerable commercial potential. A few years ago, Tesco's UK supermarkets banned the sale of kangaroo meat in their stores. The company explained that it had been persuaded by animal welfare groups that the methods used to cull the animals were cruel. It used the ban to signify that it was at the forefront of developing animal welfare and meat safety systems. Among the numerous supply chain welfare-related practices that Tesco has spearheaded are: communication with suppliers about animal treatment; research on the holding and transport of animals; and the incorporation of animal, feeds and medicines policies within its Codes of Practice. Not only do fresh beef suppliers have to comply with the Government's Code of Recommendation for Cattle Welfare, they also have to contend with inspections by Tesco personnel who audit compliance with the company's Practice Code. All of these initiatives become visible to customers through programs such as the 'Best Beef Scheme', which provides 'a completely traceable, welfare driven beef chain' (Lindgren and Hingley 2003, p. 339). Tesco is a partner in the scheme alongside calf rearers, processors and caterers.

Freidberg (2003) has outlined a similar trust-embedding strategy involving UK supermarkets which have joined the Ethical Trading Initiative in order to demonstrate their concern for the social welfare standards and environmental practices adopted by their suppliers, and particularly those in the less developed countries. She highlights some of the contradictions that flow from applying ethical trade standards that appease the conscience of Northern consumers, but do nor necessarily benefit the suppliers in former African colonies and elsewhere (see also Hughes, this volume).

Other researchers have expressed reservations about supermarket commitment to ethical principles and environmental sustainability. High hopes were held for the project known as *The Race to the Top* (RTTT), a partnership established in 2000 between UK supermarket chains and some leading civil society organisations, to benchmark the social, environmental and ethical policies and performances of supermarkets. However, the project did not get beyond the pilot phase, due largely to lack of sustained involvement by supermarkets (Fox and Vorley 2004).

Valued People

While the authority of many previously-respected agents – mothers as food authorities, for example - has waned, new groups have emerged to fill the void. In the case of food, ‘the celebrity chef’ is a case in point, and celebrity endorsement, using a publicly recognised individual to advertise or endorse a product or service, provides food companies with a vehicle which enables them to convey the impression that they are both knowledgeable about food as well as successful entrepreneurs. A study of the campaign undertaken by the UK supermarket Sainsbury at the end of the 1990s, which featured the well-known TV celebrity chef Jamie Oliver, provides strong evidence of the extent to which association with a celebrity, who embodies the values with which the sponsor wants to become aligned, can bring major benefits (Byrne and Whitehead 2003). In order to reposition itself *vis-a-vis* Tesco and the US-owned Asda chain, Sainsbury decided against attempting to compete on price, but to distinguish itself in the market as a provider of quality. To this end, it allocated £25 million to a campaign based around celebrity endorsement from Jamie Oliver, best known at the time for his television program, *The Naked Chef.* The agency responsible for the campaign explained that:

> Celebrities can build, refresh and add new dimensions. What celebrities stand for enhances brands and they save valuable time in terms of creating the credibility a company has to create in order to build in brands by transferring their values to the brand. When consumers see a credible celebrity endorsing a product they think the company must be okay (Byrne and Whitehead 2003, p. 289).

According to the director of brand marketing at Sainsbury, Jamie Oliver was chosen because he ‘stands for great food’. In the view of the study authors, he could ‘imbue the brand with a personality and values’ (Byrne and Whitehead 2003, p. 290). The campaign consisted of images of Jamie shopping in Sainsbury stores, of Jamie and family members doing their Christmas shopping at Sainsbury, and back at home cooking with ingredients purchased in the stores. Using a model of meaning transference, the authors argued that the campaign appropriated Jamie’s values, especially his valuing of quality, applied it to the Sainsbury brand, and then transferred that value to those who emulated Jamie’s approach to shopping at the store. The campaign’s success, combined with Jamie’s international recognition, led the New Zealand Foodstuffs chain to adopt a similar advertising strategy.

Valued Product Portfolios

Elsewhere I have written about the ways in which UK and Australian supermarket chains contributed to the enormous popularity of chicken meat from the 1980s onwards (Dixon 2002). Between 1970 to 1990, Australia's chicken meat complex was considered to be Australia's most successful agri-food sector. This was a result of four factors: the rapid fall in the retail price of chicken relative to other meats, due to technological advances in chicken breeding and processing plants; the bad press that red meat received as a result of the research linking cholesterol to heart disease; the capacity to distribute fresh chicken meat across the country as a consequence of supermarket cool chain systems; and women's labour force participation which led to a demand for easy-to-cook meals. Supermarkets were particularly important in terms of the last two factors, and emerged as the major purveyors of chicken meat, in spite of the rise of fast food chicken meat chains like KFC.

This research (Dixon 2002) revealed how appreciative housewives and mothers were of the range of chicken meat offerings available in supermarkets: ready-to-eat rotisseried birds, chicken nuggets for children, chicken and apricots as a dinner party treat, and chicken pieces for quick stir-fries. They marvelled at the different forms the bird took, its ease of cooking, and the fact that chicken was healthier than other meat alternatives. In those decades, chicken could have been described as 'the housewife's friend', and importantly it was associated with the supermarket rather than the butcher. This favourable symbiosis was reinforced when supermarkets elected to make the highly esteemed chicken fillet a 'loss leader' item.

It is unclear whether supermarket chicken continues to have such attraction, given the extensive publicity relating to avian 'flu, the debates around the health effects of antibiotics and hormones in chicken feed, and the images of factory farming and battery raised egg layers. Indeed, according to the US Department of Agriculture, demand for organic chicken has risen faster than any other organic food line in Australia (USDA Foreign Agricultural Service 2004). Nevertheless, it remains the case that supermarkets are very adept at allying themselves with the next big food trend because they play a leading role in creating the major antecedent socio-cultural and economic trends.

Valued Service Portfolios

Before they became hypermarkets on the edge of towns and in the heart of traffic-clogged suburbs, supermarkets successfully projected an image as the most convenient retail form because they offered ‘one-stop’ shopping. Their supersized state and increasing urban traffic congestion, combined with women’s workforce routines, mean that the claim to convenience is less and less appropriate. As a result, supermarkets are beginning to deploy kiosks located at petrol stations, to introduce small-scale versions of their larger outlets (usually located in the high street or at some point of convenience such as a commuter railway station), and to undertake home delivery and on-line shopping services. However, in the context of the role that supermarkets play in shaping ‘the mouth of the community’, this diversity-in-outlet initiative is not the most significant new direction in their service orientation.

In terms of influencing food consumption patterns, developments such as the provision of advice to parents about parenting practices and healthy food choices seem worthy of attention (Banwell et al. 2005). Tesco, once again leading the way, is utilising its online retailing capability to reach into the realm of child development, to build networks among pregnant mothers, and to provide fundamentally important public health information. Rowley has described the *You and Your Child* homepage, access via tesco.com, in the following terms:

> [It] offers a mixture of products, advice and chat. Information is provided on pre-conception, pregnancy, baby and toddler… ‘iVillage’ offers chat and other facilities such as baby name finder, pregnancy due date calendar, immunisation chart and family health directory. Chatrooms in iVillage are an arena for customer-to-customer communication, which has its parallel in the social interchange element of the bricks-and-mortar shopping experience (Rowley 2003, p. 277).

This must surely be the apotheosis of guardianship which, when symbolically linked to the retailer’s moves into financial and insurance services, imbues the corporation with huge influence in the lives of all who visit its stores, go to its website and use its ancillary services. The authority of traditional public health providers, found in government and in the professions, is being matched – and possibly superseded – by a giant market authority. This point is made by Lang and Rayner (2004, p. 74) who, citing the fact that petrol pumps in the UK carry nutritional advice to consume ‘five a day’ (i.e. five serves of fruit and vegetables), argue that health promotion is becoming privatised as it moves from the province of government to the domain of the market.

SUPERMARKETS AS CAPITAL CONVERTERS

Modern markets have been described as cultural markets or cultural economies. That is, they produce and distribute goods, services, ideas and lifestyle aspirations (Amin and Thrift 2004; Du Gay and Pryke 2002). Others have called these economies of passion, because they operate most smoothly when consumers experience an emotional attachment to the brand or to the service provider (Lury 2004). While academics debate the nomenclature, corporations are busy producing and distributing orders of worth, regimes of value, and conventions about which hierarchy of values is desirable, what constitutes 'good' and 'bad', how social practices should be conceived, and when and where they should be undertaken. As resources are expended to make commodities and practices 'good to think', the economy is enculturated. Or, put more critically, market-driven value adding results in the industrialisation of culture (Canclini 2001).

Nevertheless, the flow of ideas, values and regulated behaviours is not one-way, and ultimately the values and ideas that are adopted in society result from complex interactions between producers and consumers and senders and receivers. However, the process of persuasion which sees the acceptance of one set of ideals and not another, is an organic process; it takes time and commitment, and some groups are more accepting than others. In addition, learning new consumption patterns requires education, practice, role models, constant encouragement and financial resources.

Underpinning the processes of adding value to goods, services and brands, educating consumers and acting as role models, is an army of cultural intermediaries, including financial, marketing, advertising and communications professionals. However, professional groups are not the only form of participant in the cultural economy. Supermarkets are the archetypal cultural intermediary – continuously mobilising, and converting between – cultural and economic capital. One of the earliest proponents of the cultural economy perspective in sociology, Pierre Bourdieu, argued that there are four fundamental dimensions of capital: economic capital (wealth, income, material possessions); cultural capital (information, tastes, abilities); social capital (resources based on social networks and group membership); and symbolic capital ('the form the different types of capital take once they are perceived and recognised as legitimate') (Bourdieu 1987, p. 4).

Bourdieu proposed that socially positioned individuals have 'packages of capital', accumulating and investing in all forms of capital (Silva et al. 2004, p. 3). But he also said that 'agents' are distributed in social space according to 'the global volume of capital they possess' and 'the composition of their capital' and 'to the evolution in time of the volume and composition of their capital, that is, according to their trajectory in social space' (Bourdieu 1987, p. 4). Put more simply, he argued that people have different capacities to convert one form of capital into another, and it is this unequal distribution of resources for capital conversion that reproduces class relations.

Bourdieu also suggested that the task for sociologists is to discover 'the powers or forms of capital which are or can become efficient [in the struggle for scarce resources], like aces in a game of cards' (Bourdieu 1987, p. 4). Everything that I have described about supermarket operations resonates with the Bourdieu's theory of capital, which suggests that it is possible to extend his theory from the individual agent and socially positioned group, to the operation of institutions, such as supermarkets. Supermarkets mobilise their vast volume of economic capital not only to eliminate any competition, but to invest in cultural capital building in the form of influence over consumer knowledge, preferences and behavioural dispositions. Their combined cultural economic power establishes their pivotal role in their partnerships and networks with both suppliers and consumers, thereby accruing social capital. They enact their combined economic, social and cultural capital within the agri-food system, through setting standards upstream and encouraging conventions downstream. In this way, supermarkets operate a pincer-like strategy constantly aligning consumer cultures with producer offerings and vice versa.

As a result of their capital accumulation switching strategy, supermarkets are well positioned to acquire the symbolic capital of an authoritative actor. This last form of capital is particularly welcome at times of state regulatory oversight, such as parliamentary enquiries into market concentration or unfair trading practices. Their ability to project strength and moral authority is equally valuable at times of heightened anxiety about food safety risks.

Obviously more work needs to be done to elaborate a theory of capital that applies to institutions, but supermarkets would be a good place to begin. Just as pawnbrokers, who appropriate cultural objects in exchange for cash, adopt the by-line of 'cash converters', supermarkets could adopt the by-line 'capital converters' as they accept cash for culturally-coded goods and services and resource-rich social networks, and acquire stocks of symbolic power. An institutional map of the social fields of commerce, politics and everyday life is likely to reveal supermarkets to be in a dominant position in each of the fields.

CONCLUSION

This chapter has focused on the emergence of downstream partnerships between supermarkets and consumers, and concrete examples have been provided of the ways in which these fluid, non-contractual but emotional bonds evolve and are maintained. Not surprisingly, popular and academic reflections on supermarket operations concentrate on their direct dealings with consumers, and much space recently has been devoted to the efficacy or otherwise of supermarket loyalty schemes, posing the question ‘can loyalty be bought’? I argue that the more significant strategies are anything but direct, and involve trust building through forging associations with valued institutions, practices, people, and portfolios of products and services. Communicating strategies based on these associational bonds goes hand-in-hand with supermarket control over the supply chain, and it is in this way that producers are captive to consumers. In other words, supply chain control is not solely about cost efficiencies, but is pivotal to the supermarket’s ability to perform its role as a guardian of household and family life. Fulfilling this role is highly significant for reproducing supermarket authority, where the spiral of corporate power and cultural influence increases in velocity.

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