Marketing communications create confusion: Perception versus reality for Australian organic food consumers

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Abstract

The empirical research presented in this paper shows that existing marketing communications are leading to significant confusion for consumers of organic products. Organic products are now available in most supermarkets and, consequently, they provide consumers with an alternative to conventionally grown food. Further, the organic market continues to be one of the fastest growing product categories in Australia food industry.

The discrepancy between consumer perception and reality was identified during a qualitative investigation into the reasons for some buyers purchasing organic food. This confusion was evident at a product level, such as assuming a particular brand of chicken was organic when in fact it was only free range, and at a retail outlet level, such as assuming that all products sold at a farmers' market were organic when they were not. Interestingly some consumers expressed their confusion during discussions with the researcher, whilst for others the errors were identified by the researcher.

A major contribution to this confusion is the fact that consumers are presented with numerous different certification labels. This includes those provide by the seven independent Australian based organisations. The recent changes in Australia with the release of a certification standard for domestically produced and consumed products have the potential to reduce this confusion, particularly if the changes are supported by a new label. However, the new label and standard will need to be supported by a sustained marketing communication campaign to create consumer awareness if this is to be achieved.

Introduction

Consumers in Australia have embraced organic food, with around 40 per cent purchasing it at least occasionally (Lockie et al., 2002; Pearson, Henryks & Moffitt, 2007). This compares favourably with other countries in the developed world; in the

United Kingdom, 50 per cent buy organic (Zanoli, 2004) and 69 per cent in the United States (Demeritt, 2009). One of the challenges that marketers and retailers of organic food face is consumer confusion around what is organic food. As this paper will document, there is a difference between consumer perception of what is organic food and the reality of the product itself. It is this difference that poses a marketing communication challenge.

Literature review

Organic food preference has grown from a fringe movement to a mainstream consumer force. Whereas once consumers needed to seek out organic food in specialty health food shops and distribution was very limited, it can now be found on the shelves of most major supermarkets throughout the developed world and growth is forecast to continue. Before commencing an examination of the consumer perceptions that exist in the organic food market, it is important to provide a context and to define what is meant by "organic".

The term "organic" is open to many interpretations. The Macquarie Dictionary (2008) defines organic as anything that relates to a living organism. Utilising this definition, one could argue that all food is organic: both "conventional" and "certified organic". However, this paper examines the term from the point of view of the organic movement[1], which uses it to refer to food and other products that are grown and processed without the use of artificial pesticides or chemicals and which are not genetically modified[2]. This includes processed food and fresh produce but also extends to products that may not be traditionally considered to have organic options, such as clothing, textiles and personal care products.

Products that are "certified organic" are differentiated from those that are simply "organic" in that they are defined by certification standards. These standards vary from category to category but in each case provide a strict set of guidelines that producers and processors must follow if they are to attain and maintain certification. Records need to be kept and audits are carried out annually. Auditors trace the certified food from seed to sale (or, in the case of animals, from birth to sale) to ensure that organic principles and practices are maintained[3]. In Australia, the certification bodies are responsible for maintaining these standards.

The Biological Farms of Australia (BFA), the largest certification body in Australia, defines certified organic on their webpage as follows:

> Certified Organic products are grown and processed without the use of synthetic chemicals, fertilisers, or GMOs [genetically modified organisms] . . . Organics is not just chemical free by testing. It is about the way your food is grown and handled. The whole system is linked. Soil. Plants. Animals. Food. People. Environment. (Biological Farmers of Australia, n.d.)

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[1] For the purposes of this paper the organic movement is defined as the groups, businesses and individuals that work to further the cause of the production, supply, marketing and consumption of certified organic food.

[2] That is being derived or developed from an organism which has been modified by gene technology (Food Standards Australia and New Zealand, 2002).

[3] The National Standard for Organic and Bio-Dynamic Produce details requirements for farmers and processors (Standards Australia, 2009).

Recent changes in Australia (2009) have seen Standards Australia, along with the organic industry, develop a national set of certification standards. Consequently, it will be interesting to watch the market place for any prosecutions of the unlawful use of the word "organic" in marketing communications as currently it is possible to find a range of hair care products labelled "organic" in major supermarkets. Despite the brand name "Organics", the ingredients of this hair care range would not be permitted under organic certification standards. Not surprisingly, this lack of labelling clarity leads to confusion for some consumers (Chang, 2004; Chang, Zepeda & Griffith, 2005).

The organic certification bodies provide guarantees of authenticity through certification labels, which are attached to certified organic products. There is a plethora of labels in Australia and each of the 7 certification bodies in Australia has their own label (see Figure 1). There are even more labels when imported organic products are considered. A recent Newspoll study (2008) showed that only 31 per cent of respondents claimed to have seen the certification label when shown an example of each. Given this was prompted awareness, it is likely that, in reality, the number of consumers who can identify certification labels is even less. Not surprisingly, this same survey found that 72 per cent of respondents preferred to have a single certification label (Newspoll, 2008).

Figure 1: Labels from the 7 organisations that certify organic products in Australia

As a result of the recently released Australian Standard for Organic and Biodynamic products (Standards Australia, 2009) and the consumer confusion that exists with the existing labels, discussions have commenced with industry stakeholders about the creation of one label which would be used for all certified organic products in Australia. This prospective label has the potential to reduce consumer confusion about the status of organic products but appears to be some way off.

Globally, the sales of organic products continue to increase and are estimated to be in excess of $50 billion (Sahota, 2008), whilst the market in Australia is estimated to be over $600 million (Kristiansen, Smithson & Henryks 2008). This equates to just below $30 per person per year and is comparable to the situation in both North America and Europe (see Table 1).

Table 1: Per capita spend on organic products in selected countries

Country	Market size ($A million)	Population (million)	Annual per capita spend ($A)
Australia	623	22	28
North America	5 500	270	21
Europe	22 000	730	29

(Derived from Sahota (2008))

A more detailed investigation of the market for organic food shows that around 1 per cent of food consumers are heavy users (Lockie et al., 2002) and around 40 per cent occasional users (Pearson et al., 2007). These occasional users "switch" between buying organic and conventional food. This can occur within the same food category (e.g. organic tomatoes may be purchased one week and then conventional the next) or it may occur across categories (where consumers only buy organic milk but not other organic products). Whilst much research has examined motivations and barriers to the purchase of organic food, little exists that addresses this group of "switchers". Given that this group is already positively pre-disposed to buying organic food (as compared with 60% of consumers that are non-purchasers of organic food), it is envisaged that gaining greater insight into the switching behaviour could provide valuable information to the organic industry, which would assist their marketing communications. These "switchers" (or occasional users) were the focus of a recent major study (Henryks, 2009) and this paper develops one area from this study—namely, that of consumer confusion for organic food switchers.

Methodology

As very little research had been conducted into the switchers market segment, a grounded theoretical approach was chosen. Grounded theory focuses on building theory from the data (Glaser, 1998) and thus is an inductive approach. Further, this approach is suitable to "the study of any behaviour that has an interactional element to it" (Goulding, 2005, p. 296).

Research participants were selected based on two criteria: they needed to be the primary shopper for the household; and they needed to buy at least three organic items per week but not buy the majority of their food as organic. The sample consisted of 21 participants in Canberra and Armidale covering a range of household demographics.

Semi-structured, in-depth interviews were conducted as they permitted flexibility during the interview. With the semi-structured approach, a list of topics is prepared with no fixed ordering of either words or questions (Minichiello, Aroni & Hays, 2008). This flexibility allowed the researcher to follow the direction of the participant's conversation and thus permit issues and perspectives to arise which may not have been previously considered. It was deemed a more suitable approach than using a structured questionnaire, which would have provided a clear structure of questions to be covered but would have restricted the researcher's ability to follow the participant's story. Using the probe list was a useful way of ensuring that all areas previously identified as important were touched upon, but that the overall interview was not limited by any thoughts the researcher had about the research topics.

The component of the main research study that is reported in this paper is an analysis of cases where some form of confusion was identified—either by the participant or by the researcher. Cases were examined for participant-identified confusion and these were coded using the qualitative data software program NVivo7 (QSR International, 2006). Triangulation was also used in the form of the researcher gathering data on actual products available in the supermarkets and other retail outlets (such as farmers' markets) described by the participants. This was then compared with what participants had said in the interviews. Triangulation is in line with a grounded theoretical approach (Länsisalmi, Peiró & Kivimäkial, 2004) and provided an opportunity to identify gaps that existed between participant perception and the actuality of the retail environment, this being defined as researcher-identified confusion.

Findings: perception versus reality

A majority of participants had at least some area of either self-identified or researcher-identified confusion when it came to organic food. This confusion centred predominantly around assuming food was certified organic when it was not. That is, participants assumed they were buying and consuming organic food when they were actually consuming conventional food (or possibly "chemical-free" food). This confusion existed at both the product level and at the retail outlet level. As previously mentioned, there were two types of confusion which have been labelled as either researcher-identified or as participant-identified.

Product level confusion

A key area of researcher-identified confusion occurred with particular products. Fresh chicken meat was the most commonly identified product category where there existed a mismatch between consumer perception and marketplace reality. One brand of fresh chicken was thought by several participants to be organic when, in fact, it is free range, not certified organic. The brand in question was Lilydale chicken and, although it does not make any claims to be an organic product, either on its packaging or on their website (http://www.freerangechicken.com.au), some participants assumed it be organic. Gabrielle and Oliva's[4] comments exemplify this mismatch.

> Now chicken, I like to buy the Lily Farm . . . which is organic chicken. (Gabrielle, Armidale)
>
> I buy organic chicken . . . I just trust the label . . . yes . . . and often it's got some rolling green hill attached to it (laughing) love that marketing . . . all of a sudden you can picture the chicken grazing on some hill somewhere . . . (laughing) (Olivia, Canberra)

Store visits in Canberra and Armidale[5], found that Lilydale Farms was the main non-conventional brand in supermarkets. That is, apart from conventionally-farmed chicken, Lilydale was the only brand that offered an alternative to conventionally-produced chicken. Participants assumed this to be organic, possibly due to the imagery on the labelling. Labels are various shades of green and include a picture of a luscious green paddock. Interestingly, there are no actual chickens pictured on the label.

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[4] Participants have been given hypothetical names to protect their identity.

[5] The major supermarkets in both Canberra and Armidale were monitored for organic food for 3 months either side of the research interviews.

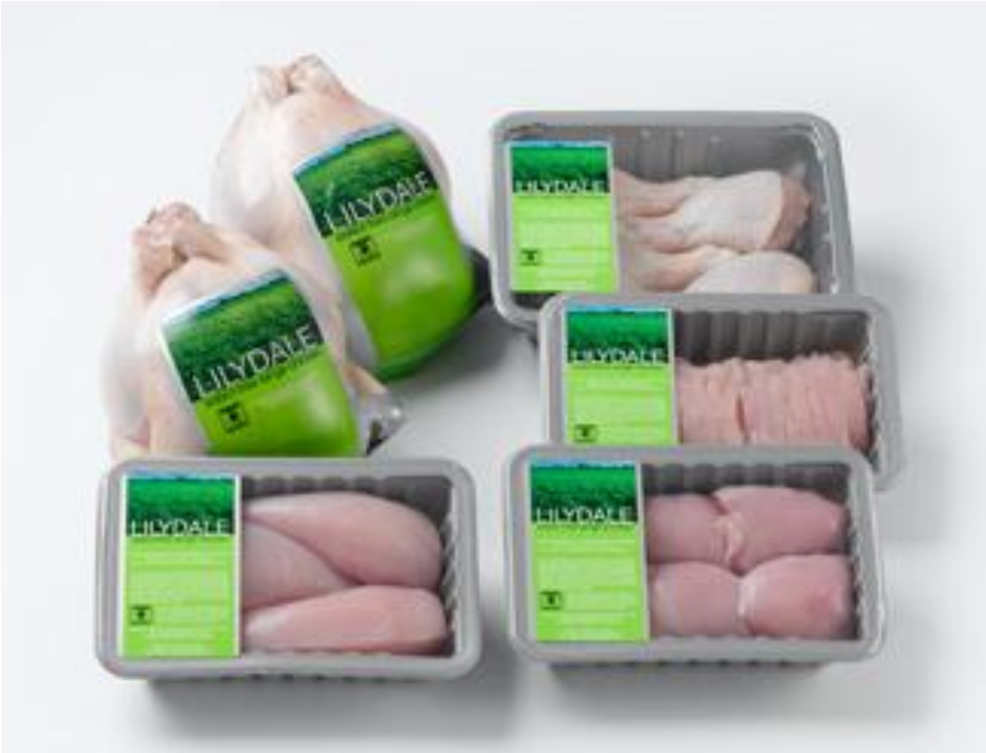

Figure 2 Image of Lilydale packaging

The Lilydale Free Range Chicken label also carries a logo stating that their farms are maintained to the standards set, and are accredited, by Free Range Egg and Poultry Australia. (For further information, see http://www.frepa.com.au/main.html.)

Figure 3 Free Range Egg and Poultry Australia logo

Eggs were another product category where confusion existed. Some participants were not clear whether they were buying organic or free-range, or what the difference is. In Australia, there are many product offerings in the eggs category. Examples include "barn-laid", "free-range", certified organic and Omega-3 to name a few. These terms are not interchangeabl; although in Australia certified organic eggs require that the chickens free range as well, certified organic eggs are both free-range and organic. Given the range of options, it is hardly surprising that participants were confused. Olivia is one participant who used the words organic and free-range interchangeably:

> . . . and the same with eggs too . . . and I don't often check it says organic next to it I often assume that but they say free range with the proper authorisation thing is it like a tick . . . (Olivia, Canberra)

Retail outlet level confusion

Another key area of researcher-identified confusion occurred at the retail outlet level. Some participants made assumptions about the attributes of products stocked at retail outlets, which could differ from the reality of the situation. Betty purchased the majority of her dry goods from a local health food store and assumed that they were organic. Whilst this store does stock some organic products, the range of bulk certified organic dry goods is extremely limited to around 3–5 product lines out of over 100 stocked. There is a mismatch between Betty's perception of what she buys and what she actually buys:

> It's probably because we're forced into—we need to get it from the health food shop which means we can get it organic there. (Betty, Armidale)

This is contrast to Natalie who correctly identified a retail outlet as organic and made the assumption that all goods were certified organic but qualified her statement by saying that they are marked as organic. Visits to this retail outlet showed a mix of organic and conventional products for sale. Although certified organic products are clearly labelled in this outlet, the labels require reading to determine organic status.

> I'm assuming at the organic shop everything's organic otherwise it will say . . . usually there's a sign saying it's organic . . . (Natalie, Canberra)

Researcher- and participant-identified confusion: Farmers' markets

Farmers' markets are a retail outlet where assumptions are made about the organic nature of products stocked. Again, researcher-identified confusion was evident and stemmed from participant assumptions that food at the farmers' market was organic. Queenie and Penny both considered that food at the local farmers' market was organic. This is not the case. The two main farmers' markets in Canberra encourage local produce but not necessarily organic[6].

> You don't know if anything is organic if you buy fruit and veggies from anywhere else, but if you go down to the markets or the vegetable shop, you know that the stuff is local and organic. (Queenie, Canberra)

> I buy a lot of fresh nuts and things or not fresh nuts but raw nuts and I just sort of assume they're organic and that what I'm getting at farmer's markets and things is organic. (Penny, Canberra)

Participant-identified confusion also existed in the case of the farmers' markets. Upon reflection during the interview, Ursula and Rose both realised that the food sold at the farmers' market may not be organic. This is not something they had previously thought about in any detail, having assumed it was organic. Tanya enjoyed shopping at the weekly farmers' market in Canberra and told herself it was predominantly organic. However, upon reflection during the interview she also realised that this may not be the case.

> . . . thinking about it now I realise that the farmers' market might not always be organic even though it's locally produced and that sort of thing it will depend on which stalls you choose from which ones are organic and which are not. (Ursula, Canberra)

> No probably not, when I think of it I just assumed it was all organic but I hadn't looked to be honest to see if it was labelled organic or not. (Rose, Canberra)

> Umm well I like to believe, I tell myself the bulk of it is. (Tanya, Canberra)

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6 For further information on the two farmers' markets in Canberra, see the following websites: http://www.capitalregionfarmersmarket.com.au/ & http://www.southsidefarmersmarket.com.au/.

How do consumers tell if it's organic?

One of the questions that participants were asked is how they could tell if something was organic. Information came from two main areas: labelling and appearance. Not surprisingly, labelling provided a major source of product information pertaining to organic status. Anna, Betty, Conrad and Lexi all used labels to inform themselves of a products organic status.

> I look for the little symbol some sort of certification symbol . . . (Anna, Armidale)

> Just in the labelling. (Betty, Armidale)

> Well often I make the assumption and if I'm told it is organic I will [in the co-op]. Sometimes I am a little bit wary, however, I read labels—I'm pretty keen to read labels [in the supermarket]. (Conrad, Armidale)

> . . . there is an Australian certified organic product label so I tend to just look out for that . . . (Lexi, Canberra)

However, when it came to fresh fruit and vegetables, appearance could also provide clues. Ursula felt that organic fresh fruit and vegetables tended to be less perfect than their conventional counterparts. Signs of imperfections could include bug holes or irregular shaped produce.

> Well I can only make assumptions about which ones are and which ones aren't and it'll usually go toward whether they've got something written up there or the way the food looks. Like you can tell the ones that look nice and polished and perfect they're probably not going to be organic than the ones that have got spots and whatever and look slightly smaller or things like that and that aren't being sold in bulk so that makes me think that they're probably [organic] . . . (Ursula, Canberra)

One participant did volunteer that she could not recall the actual logo even though she knew one existed. The specific issue of logo recognition and/or recall was not the focus of this study, so it is possible that others were also unable to recognise it. It is mentioned here because the participant raised it and it is shown as an example of participant-identified confusion.

> Just that it's organically grown and I think there's a certification logo as well which I usually look out for . . . I can't recall what it is though . . . (Mary, Canberra)

Some participants were unclear as to the organic status of some of the food they consumed on a regular basis. Packaged dry goods typified this participant-identified confusion. Elizabeth and Penny were unclear as to whether some of the packaged products they consumed were organic or conventional. It turned out that Elizabeth's brand of tea was organic but Penny went and checked in her cupboard at the conclusion of the interview and discovered that the tinned tomatoes she had purchased were not organic (despite assuming they were).

> I'm not sure of the brand of tea that we drink. The Nerada one; that's an organic one or if it's just a low caffeine; I don't remember. I'd have to have a look on it. (Elizabeth, Armidale)

> But I'm pretty sure I've got the organic beans and organic tomatoes and stuff. Probably because the first time I looked at it I went "oh yes organic, that would be better tasting and better quality" so yeah . . . it's sort of assumed what I'm getting is organic I guess. (Penny, Canberra)

Discussion

One of the interesting issues that arises in the organic marketplace is the amount of confusion that organic food engenders. Confusion exists in the organic food marketplace and has done so for a while (Aarset et al., 2004; Shaw Hughner et al., 2007). What this paper demonstrates is specific areas of confusion and how they manifest in the buying behaviour of consumers that switch between organic and conventional food.

Confusion pertaining to eggs has been written about in the mainstream media (e.g. see Australian Consumers Association, 2008) and it has also been briefly mentioned in the academic literature (Chryssochoidis, 2000; Aarset et al., 2004). Confusion can be to do with consumers not trusting the labelling (Lockie et al., 2002) or with not having labelling clarity (Chang, 2004; Chang et al., 2005). Until recently[7], the use of the word organic was not legislated in Australia and, as previously mentioned, one could go into major supermarkets and find hair-care products legally labelled as "organic". As the standard is so new, it is will be interesting to watch the marketplace response to the legislative changes that have recently occurred.

Similar labelling issues are being discussed for other product categories. A recent article in the *Weekend Australian* (Woods, 2010) discussed the issues pertaining to the labelling of free-range pigs. It warned consumers not to be misled by a label "Bred Free Range", which in reality meant that piglets are taken off their mothers at around 3 weeks and raised indoors—hardly free range. Given the complexity of issues surrounding labelling, it is not surprising that consumers are confused.

The mismatch between what consumers assume they are buying (i.e. organic food) and what they are actually buying has been previously identified in research examining organic food purchasing in Croatia (Radman, 2005). In this study, consumers assumed they were buying organic food when in fact there was no organic food sold at the market. A similar situation occurred in this present study when some consumers attending the farmers' market in Canberra assumed that they were buying organic food when only a very few stalls sell certified organic food[8].

This mismatch between perception and actual consumption can potentially result in several challenges for organic food marketers and retailers. It may advantage some stallholders selling conventional food as they benefit from the halo effect of the term "farmers' market". However, it poses challenges for those selling certified organic as they face the communication challenge of assisting some consumers to differentiate organic from conventional when they already assume they are buying organic?

Labelling is one part of the solution and, with the recent changes to the organic certification standards in Australia, this may lead to greater clarity for the consumer; however, if consumers are not paying attention to labelling in the first place, this step may well not be of assistance. Greater industry-led education communicating the new law offers one area. The various industry bodies do what they can to educate consumers with their limited resources. Other countries, such as Denmark, Germany and the United Kingdom, have had greater government support for consumer education programs (Defra, 2004). It is possible that the Australian organic industry would benefit from

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7 A national organic standard was introduced in 2009 by Standards Australia.

8 Some stall holders label their produce as "chemical free" but are not permitted by the market administration to label it as organic unless they are "certified organic".

greater government support, given the noted environmental benefits of organic food production.

This confusion also suggests that there may be a case for standardising the certification logos and decreasing their number. As illustrated in Figure 2, in Australia there are 7 certifying bodies and 8 logos (the extra logo being the Australian Government logo). In Denmark, where there is one main logo, the recognition and trust of that logo is higher than in Australia where there are many logos. Wier et al. (2005) found that 93 per cent of Danish consumers recognised the Danish organic label compared with a Newspoll 2008 study, which found that 69 per cent of Australian consumers could not recognise any of the certified organic symbols.

And finally, consumers are happily buying products either unaware of their organic status or are mistakenly buying conventional instead of organic—does it matter? We would argue that it matters in as much as incorrect assumptions have the potential to devalue the organic "brand" in the longer term. For example, how would consumers feel when they learn that the organic food they thought they were buying is actually conventional? How will this influence their organic buying behaviour? These questions require serious consideration if the industry is to continue to value its image.

Conclusion

This research has identified some challenges in the organic food industry that arise when existing marketing communications create confusion for consumers, such as when their perception is not consistent with the reality. In some cases consumers were aware of this confusion, whilst in others they were oblivious to it, these being the self-identified and the researcher-identified confusions. The most commonly identified confusion at a product level was with chicken meat, whilst at a retail outlet level it was with farmers' markets. The recent release of certification standards for organic products sold in Australia has the potential to reduce this confusion, particularly if a new label is developed and marketed. However, unless it is supported by a sustained marketing campaign to create consumer awareness, this confusing is likely to continue.

As this research has only investigated the confusion that exists amongst occasional consumers of organic food, further research would be useful to quantify the extent of this confusion, including investigation for both product categories and individually branded products. Research has been conducted into trying to ascertain optimum labelling so as to communicate nutritional information (e.g. Wansink, Sonka & Hasler, 2004) and it would be useful to have a similar level of understanding for organic food labelling. Once more is known about the specific nature of the confusion, marketers will be able to develop communication strategies to address the particular issues.

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