Misreading between the lines[1]

Consumer confusion over organic food labelling

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ABSTRACT: *Organic products are now available in most supermarkets, consequently providing consumers with an alternative to conventionally grown food. The empirical research presented in this paper demonstrates that existing marketing communications are leading to significant confusion for consumers of organic products. A major contribution to this confusion is the fact that consumers are presented with numerous different labels that indicate that the product is certified organic. The recent release of a certification standard for Australian produced and consumed products has the potential to reduce this confusion, particularly if it is supported by a sustained marketing communication campaign that creates a high level of consumer awareness for a single new national label.*

Introduction

Globally, the sales of organic products continue to increase and are estimated to be almost $60 billion (Willer, 2010), while the most recent Australian market figures are almost $950 million (Mitchell et al., 2010).

Consumers in Australia have embraced organic food. Around 60% have purchased at least one product in the last year (Mitchell et al., 2010),

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an increase from previous studies that found that around 40% of people purchase organic food at least occasionally (Lockie et al., 2002; Pearson, Henryks, & Moffitt, 2007). This compares favourably with other countries in the developed world, such as in England, where 50% buy organic (Zanoli, 2004) and United States 69% (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.

Organic food preference is no longer the domain of the alternative few. It is now a mainstream consumer force. Whereas consumers once needed to seek out organic food in specialty health food shops because distribution was very limited, it can now be found on the shelves of most major supermarkets throughout the developed world (Willer & Kilcher, 2010). 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. Using 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[2], 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[3]. Although fresh fruit and vegetables and non-alcoholic beverages are the most frequently purchased categories in the organic market, non-food organic products, such as clothing, textiles, and personal care products also have organic versions.

Products that are 'certified organic' are differentiated from those that are simply 'organic', in that they meet specified certification standards. These standards vary from category to category, but in each case provide a strict set of requirements that producers and processors must follow if they are to obtain 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[4]. In Australia, there are seven certification bodies that are responsible for administering these standards.

Recent changes in Australia (2009) have seen Standards Australia, in consultation with the organic industry, develop a national set of certification standards. The new standard is not law, but may aid Australian regulatory authorities, such as the Australian Competition and Consumers' Commission, in applying existing laws, such as the Trade Practices Act, to ensure that products sold as 'organic' or 'biodynamic' are indeed legitimate. To date, there have been no prosecutions under this new regime and industry players are watching the market to see the severity with which the new standards will be enforced.

The organic certification bodies provide guarantees of authenticity through labels that are attached to certified organic products. There is a plethora of labels in Australia and each of the seven certification bodies in Australia has their own label (Figure 1). Consumers are confronted with even more labels when imported organic products are considered. A recent Newspoll study (2008) revealed that only 31% of respondents claimed to have seen the certification label when shown an example of each. Given that this has prompted awareness, it is likely that in a purchase situation the number of consumers who can identify certification labels is even less. Not surprisingly, this same survey found that 72% of respondents indicated that they would prefer to have a single certification label (Newspoll, 2008).

Figure 1. Labels from the seven organisations that certify organic products in Australia

The USA and European Union both have a one-label requirement. The Organic Federation of Australia is currently liaising with industry stakeholders working to develop one, although these discussions have been going on for over fifteen years (Starr, 1995). This prospective label has the potential to reduce consumer confusion about the status of organic products.

A more detailed investigation of the market for organic food shows that around 1% of food consumers are heavy users (Lockie et al., 2002) and around are 60% occasional users (Mitchell et al., 2010). These occasional users 'switch' between buying organic and conventional food. This can occur within the same food category (for example, organic tomatoes may be purchased one week and conventional the next) or it may occur across categories (where consumers buy only organic milk but not other organic products). 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, the consumer confusion that exists around the organic status of products.

Methodology

As little is known about the organic food switcher group, I used a grounded theory approach. This 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 be switchers. This was defined as buying at least three, but not all, organic items each week. The sample consisted of 21 participants in two cities, Canberra and Armidale (NSW), and covered a range of household demographics. Semi-structured, in-depth interviews were conducted, as they permitted flexibility during the interview. With this semi-structured approach, a probe list of topics was prepared (Minichiello, Aroni, & Hays, 2008). This flexibility allowed me to follow the direction of each participant's conversation and thus permit issues and perspectives to arise that may not have been previously considered. 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 only to thoughts that I had about the research topics.

This paper reports on cases where some form of confusion was identified: either by the participant or by the researcher. 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 retail outlets described by the participants. This was then compared with what participants had said in the interviews. This 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. Participants were assigned pseudonyms to protect their privacy.

Consumer confusion: Perception versus reality

The majority of participants had some area of confusion when it came to organic food. This confusion centred on assuming that food was certified organic when it was not. That is, participants assumed that they were buying organic food when they were actually buying conventional food (or possibly 'chemical-free' food). This confusion existed at both the product level and at the retail outlet level.

How do consumers tell if it's organic?

Participants were asked 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 product's 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 tend to be less perfect than their conventional counterparts. 'I can only make assumptions about which ones are and which ones aren't and ... usually ... whether they've got something written up there or the way the food looks ... 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] ...'. Signs of imperfections could include bug holes or produce of an irregular shape.

One participant, Mary, volunteered that she could not recall the actual logo, even though she knew one existed: '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…'.

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 transpired 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 that 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.*

Product level confusion: Chicken and eggs

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 was identified by the researcher as being 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 to be organic. Gabrielle's and Oliva's 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 by me[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, which includes a picture of a luscious green paddock. Interestingly, there are no actual chickens pictured on the label.

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. This logo is unable to be reproduced and can be viewed at http://www.frepa.com.au. It shows a black chicken on a map of Australia and includes the words 'Free Range Egg and Poultry Australia Limited (FREPA)'.

Eggs were another product category where participant and researcher identified confusion existed. Some participants were not clear whether they were buying organic, 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', 'Omega-3', to name a few. These terms are not interchangeable although in Australia certified organic eggs require that the chickens are free range as well. Thus, certified organic eggs are both free range and organic. Given the range of options it is hardly surprising that participants were confused. Olivia 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…

Retail outlet level confusion: It's all organic

Another key area of confusion occurred at the retail outlet level. Some participants made assumptions about the attributes of products stocked at retail outlets that differed 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. 'We need to get it from the health food shop which means we can get it organic there'. While this store stocks some organic products, the range of bulk certified organic dry goods is extremely limited to around 3-5 product lines out of over one hundred stocked. I identified that confusion exists due to the mismatch between Betty's perception of what she buys and what she actually buys.

This is in 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. 'I'm assuming at the organic shop everything's organic otherwise it will say … usually there's a sign saying it's 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.

Farmers' markets comprise a retail outlet where some participants made assumptions about the organic status 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 farmers' 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 was not something they had previously thought about in any detail, having assumed that it was all organic.

> *…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*

Tanya, however, 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.

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

Discussion

The organic food category creates a substantial amount of confusion among occasional users. This confusion is not new and has been a feature of the organic market for a long period of time (Aarset et al., 2004; Shaw Hughner et al., 2007). Confusion over labelling was mentioned as a factor over a decade ago (Hutchins & Greenhalgh, 1997), and at first glance, little appears to have changed, despite the market growth. However, the contribution of this paper is to demonstrate specific areas of confusion and how they manifest in the buying behaviour of consumers who switch between organic and conventional food. Specifically, confusion was found to exist both at a product level (in relation to eggs and poultry) and at a retail level (in relation to farmers' markets and health food shops). If a large number of consumers are unwittingly purchasing conventional food while believing it to be organic, this could be a major concern for the organic industry.

Confusion pertaining to eggs has been written about in the mainstream media (see, for example, Australian Consumers Association, 2008) and it has also been briefly mentioned in the academic literature (Aarset et al., 2004; Chryssochoidis, 2000). The egg category is one where choice abounds and it is not surprising that consumers are not clear on the various options. Confusion can also be related to consumers not trusting the labelling (Lockie et al., 2002) or with not having labelling clarity (Chang, 2004; Chang et al., 2005). Kapferer (1995) suggests that some brands aim to create a 'halo of resemblance' and it is possible that this is the case with some of the egg and poultry brands in the Australian marketplace. The recent changes to the organic standard in Australia have yet to have an impact and may not do so for some time; thus it is important to consider the implications of existing confusion.

Interestingly, the organic sector is not the only industry besieged by issues of confusion; similar labelling issues are being raised in 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 three weeks and raised indoors: hardly free range. Given the complexity of issues surrounding labelling, it is not surprising that consumers are confused. At a retail outlet level, consumer confusion has been previously identified in other countries. Radman (2005) found that consumers in Croatia assumed that they were buying organic food when in fact there was no organic food sold at the market in question. This mismatch between perception and actual consumption can potentially result in several challenges for organic food marketers and retailers. At a farmers' market it may advantage some stallholders selling conventional products, as they benefit from the halo effect where some consumers assume that it is organic. However, it poses challenges for those selling certified organic produce at these markets. How do these producers differentiate their produce form their conventional counterparts if consumers assume that all produce is organic? To date, face-to-face selling at the market and clear labelling are the two main options available to stallholders; however, neither are necessarily efficient forms of communication.

Consistent labelling, such as one national label, 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 many consumers are not 'paying attention' to labelling in the first place, its impact will be minimal. Grunert (2007, 167) suggests that with the exception of 'food freaks, gourmet magazines, cooking clubs and the like' consumers rarely make an effort to get information about new food products. Hence there is significant inertia for altering current perceptions when existing brand schemas incorrectly identify conventional products as organic.

This confusion adds weight to the case for one certification label. 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% of Danish consumers recognised the Danish organic label compared with a Newspoll 2008 study, which found that only 31% of Australian consumers could recognise any of the certified organic symbols. Alarm bells should be ringing for the industry when its brands have such low level of awareness as measured by aided recall. Increasing the level of education that communicates information about the new standards offers one area of development. The assorted Australian organic industry bodies have limited resources to use for educating consumers. Other countries such as Denmark, Germany, and the United Kingdom have significant government support for consumer education programs (Defra, 2004). Given the noted environmental benefits of organic food production (see, for example, Pimentel et al., 2005), the Australian organic industry would appear to have a good case for greater government support.

And finally, does all this confusion matter? Foxman et al. (1992) argue that, in regards to brands, the confusion must involve errors of which the consumer is unaware, because if a consumer is aware that their beliefs about a product are wrong, they will reject that belief. We would argue that it does matter in as much as incorrect assumptions have the potential to devalue the organic 'brand' in the longer term. For example, how will consumers feel when they learn that the organic food that they thought they were buying is actually conventional? How will this influence their buying behaviour? Will they, as Foxman et al. (1992) point out, reject their incorrect beliefs and stop buying organic products altogether? These questions require serious consideration if the organic industry is to continue to value its image and protect its brand equity.

Conclusion and further research

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

As this research has investigated only the confusion that exists among 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 for the communication of nutritional information (see, for example, 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 identified.

Notes

1. With thanks to Dr Paul Lieber for the title.
2. 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.
3. That is being derived or developed from an organism that has been modified by gene technology (Food Standards Australia and New Zealand 2002).
4. The National Standard for Organic and Bio-Dynamic Produce details requirements for farmers and processors (Standards Australia 2009).
5. The major supermarkets in both Canberra and Armidale were monitored for organic food for three months either side of the research interviews.
6. For further information on the two farmers' markets in Canberra please see the following websites: http://www.capitalregionfarmersmarket.com.au/ and http://www.southsidefarmersmarket.com.au/.

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