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Clean and Green: A Review of Organic Food and Its Marketing in Australia

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Abstract: Over the last 50 years certified organic food has developed into the most visible global brand for a healthier and more environmentally sustainable food choice for consumers. This paper investigates why consumers in Australia are buying organic food and presents information that is accessible to industry practitioners. The main marketing challenge — which is shared with many other niche markets in the food industry including those selling other "clean and green" products — is the requirement to convince consumers in a cost effective manner of the superior "value" of their products relative to substitute products. For organic food it is that its unique features of superior health and environmental credibility are worth the extra cost. There is also the more general need to improve the visibility and credibility of the 'organic brand' amongst consumers. There are a number of methodological limitations associated with existing research that emerge from a reliance on consumer self-reporting (rather than actual behaviour) and demographic variables for consumer segmentation (which do not identify significant differences).

Key words: food marketing; organic products; consumer choice; Australia
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1. Introduction

Emerging concerns with global population growth, food security and environmental degradation have highlighted potential challenges for some aspects of the existing food system. As the negative impacts of industrial agriculture on human health and natural ecosystems has become evident, the organic food movement has emerged over the last 50 years and it is now recognized as a viable alternative food provisioning model (Pearson, Henryks & Jones, 2011). Rather than focusing on high short-term productivity, which has led to the use of significant chemical and energy inputs, organic food production places value on human well-being and the long-term viability of ecological systems.

The marketing of organic food has been the subject of numerous investigations in Australia (Lockie et al., 2004; Oates et al., 2012; Pearson et al., 2011) and internationally (e.g., Janssen & Hamm, 2012; Paul & Rana, 2012; Rödiger & Hamm, 2015). This paper adds to the discussion by contributing a review of research on one aspect of the connection between farmers and consumers, this being those issues that are captured within the marketing of organic foods, with a focus on Australia. It commences with consideration of retail outlets selling

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organic food and the availability of individual products in them. It then provides an overview of what is known about those consumers who buy organic products and why they do so. This analysis highlights a number of marketing challenges and notes limitations arising from the methods used in this market research. It is important to note that other aspects of the organic food movement continue to be the subject of academic investigations that are beyond the scope of this paper. These include areas such as political consumerism (Kjærnes, 2006), trust in modern food systems (Bildtgård, 2008; Dubuisson-Quellier, Lamine & Le Velly, 2011), and erosion of ideals in the organic food movement as is has become more "main stream" (Buck et al., 1997; Lockie et al., 2000).

2. Literature Review and Discussion

2.1 Requirements for Food to Be Labelled "Organic"

The following definition of organic agriculture was developed by the International Federation of Organic Agriculture Movements:

- Organic agriculture is a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with adverse effects.
- Organic agriculture combines tradition, innovation and science to benefit the shared environment and promotes fair relationships and a good quality of life for all involved. This is manifest in four principles namely Health, Equality, Fairness, and Care (IFOAM, 2014a).

According to the first principle of health, IFOAM goes on to state that organic agriculture should "sustain and enhance the health of soil, plant, animal, human and planet as one and indivisible". In this context health is considered to be the wholeness and integrity of living systems. Hence it is not simply the absence of illness, but the maintenance of physical, mental, social and ecological well-being. Thus organic agriculture aims to produce high quality, nutritious food that contributes to wellbeing as a form of preventive healthcare. This is achieved by minimizing the use of fertilizers, pesticides, animal drugs and food additives that may have adverse health effects.

The principle of ecology states that organic agriculture "should be based on living ecological systems and cycles". Thus organic agriculture, pastoral and wild harvest systems should fit the cycles and ecological balances in relation to the culture and scale in the natural local environment. Inputs should be reduced by reuse, re-cycling, and efficient management of materials and energy. Organic agriculture should also aim to protect and benefit the common environment including biodiversity as well as variety of habitats and landscapes.

The principle of fairness states that organic agriculture should "build on relationships that ensure fairness with regard to the common environment and life opportunities". This is amongst people, and with other living beings. Individuals should have a good quality of life, hence organic agriculture aims to contribute to food self-sufficiency and the reduction of poverty. Further, animals should be provided with the conditions that accord with their natural behaviour.

The fourth and final principle, that of care, states that organic agriculture should "be managed in a precautionary and responsible manner to protect the health and well-being of current and future generations and the environment". This incorporates a blending of scientific developments with traditional wisdom. Thus organic agriculture aims to prevent significant risks by adopting appropriate technologies and rejecting unpredictable ones, such as genetic engineering.

Based on these principles IFOAM has developed standards and associated certification systems for organic

products (IFOAM, 2014b). Organic standards are used to create an agreement about what an “organic” claim on a product means, and in many cases it is communicated to consumers through a certification symbol or logo. Groups of organic farmers and their supporters, often in one geographic region, began developing organic standards back in the 1940’s. Today there are hundreds of these private organic standards around the world. In addition there are those developed by more than 60 national governments which involve certification by an independent third-party and aim to regulate any kind of an “organic” claim on a food product label.

IFOAM provides a minimum set of requirements for organic food that covers production and processing (IFOAM, 2014b). This substantial document (126 pages) provides details for production (crops, animals, aquaculture), processing, handling, labelling and social justice. Both private standards and government regulations are eligible for consideration for official endorsement through a process referred to as equivalence with these IFOAM baseline requirements. For example the Australian based Australian Certified Organic has built upon the IFOAM baseline to develop its own standards for certification of organic products (ACO, 2014).

It is important to emphasize that the requirements for organic agriculture extend beyond farming practices to encompassing the whole supply chain. In this way, the organic food movement advocates a food system in which all activity associated with production, distribution, retailing and consumption is underpinned by a concern for human and environmental health.

2.2 Size of Organic Food Market

Continuing support for the organic food movement is found throughout the world. As an indication of its attractiveness to consumers, global sales of organic products have been increasing at around 10% per annum over recent decades and are now over $US60 Billion. Interestingly fruits and vegetables, with their natural affinity in a healthy diet, are the largest segment, accounting for around one third of total sales (Willer & Lernoud, 2014). It is anticipated that consumer demand will continue to drive growth although it is constantly under threat from conventionally grown products, and to a lesser extent other complementary systems such as local food (Pearson et al., 2011).

However, despite the claimed benefits of organic products, they still only account for 1% of all food sold in Australia, or just over $A1 billion per annum (Monk et al., 2012). If the market share of organic products is to increase further, it will be crucial to identify consumer defined barriers currently preventing expansion of the market and effective ways of marketing to overcome them (Lockie, Halpin & Pearson, 2006).

2.3 Retail Outlets Selling Organic Products

In the early period of the organic movement, consumers only had access to a minimal variety of fresh seasonal fruits and vegetables, often sourced directly from the farmer. This has been expanded to include many other complementary retail outlets, such as farmer’s markets, health food stores, food co-operatives, and home delivery box schemes (Pearson & Bailey, 2012).

Further it is interesting to note that a potentially significant source of organic food is not purchased. This includes harvesting from the wild and that which is grown for personal consumption in and around where people live, such as backyard and community gardens. The most recent estimate for the amount of home-grown fruits and vegetables indicates that it is around 5% (ABS, 1992). However it is unlikely that all of this would meet the requirements of organic certification. Interestingly guidelines for using organic methods do exist for small scale growing. These are within the IFOAM principles of organic agriculture as previously discussed (COGS, 2014; GO, 2014). However, they are not sufficiently robust or with a mechanism for enforcement to allow such products to be labelled certified organic food.

Today in most parts of Australia it is possible to purchase most food products in an organic form throughout the year. This has been achieved with improved production knowledge and the development of sophisticated organic supply chains. For example, many supermarkets include organic options in all the major fresh fruit and vegetable lines; meats — beef, lamb, chicken, pork and even some processed meats such as sausages; dry goods — flour, sugar and semi prepared products such as pancake mix; bottled and tinned goods — apple juice, baked beans, baby foods, tomato sauce and the like; dairy — milk, cheese, yoghurt; bakery — bread, cakes; and confectionary — chocolates, sweets and biscuits (Pearson, Henryks & Jones, 2011).

In addition, organic products are available in some non-food categories, such as personal cosmetics and clothing, which are experiencing rapid growth (Monk et al., 2012). However, organic does not currently have a presence in many other areas such cleaning agents or paper products.

2.4 Who Buys Organic Food?

Research results have consistently indicated that consumers who buy organic products are demographically the same as those who do not, that is, they are the same as those who buy conventional products (Lockie et al., 2004; Pearson, Henryks & Moffitt, 2007; Pearson et al., 2013).

Furthermore, most consumers who purchase organic products do not purchase them exclusively, as they switch between conventional and organic products. It has been suggested that a very small number of consumers (probably less than one in a thousand) buy a large quantity of organic products on a regular basis, consequently most only buy small amounts on an irregular basis (Oates, Cohen & Braun, 2012). This observation is supported by evidence where the percentage of organic product sales is less than the percentage of consumers who purchase them. For example, in Australia, it has been estimated that around 60% of consumers purchase organic food products, although organic sales are less than 1% of total sales (Henryks & Pearson, 2010). It is therefore suggested that increasing sales to existing organic consumers may be one of the easiest growth paths for the industry.

Given the amount of research undertaken in Australia, and overseas, over the last 20 years it is somewhat surprising that there are still notable gaps in knowledge of organic food consumers. One reason for this is that the literature concerned with identifying the characteristics of these consumers has primarily focused on demographics as a segmentation variable. Aside from inconsistent results that suggest, in particular circumstances, organic consumers are more likely to have higher levels of education, be more affluent, be women, have young children, and grow their own vegetables, there are few trends specific to demographic segments.

In order to overcome the limits posed by focusing on demographics, some studies have used multiple segmentation parameters. These include combinations of attitude and behaviour, which generated segments based on level of “green” purchasing behaviour (Pearson, 2001; Pearson, Henryks & Moffitt, 2007). Other examples of behavioural segmentations include those based on level of awareness, level of commitment, or purchase frequency (Pearson et al., 2013).

There are further methodological issues that have limited the usefulness of segmentation research. The sample of consumers used in this research, and the retail outlet available to them, presents an important issue in developing an understanding of organic consumers. The choice of organic products is limited first by the retail outlet selected, and then the availability of specific products within that outlet. Food consumers often use more than one retail outlet, and the products available may differ between outlets. For example within a particular week, a consumer may go to a farmer’s market and then purchase remaining items at a supermarket. In pursuit of more illuminating consumer segmentations two new variables, who the consumer is buying for and whether they are

shopping alone, have been identified as potentially influential factors that may alter whether organic food is purchase on different shopping trips (Henryks & Pearson, 2012). Consumer purchases are therefore influenced by issues pertaining to retail outlet selection, product availability within that outlet, and the nature of the particular shopping trip.

Another methodological issue that is presently hindering the creation of a sophisticated organic consumer profile is the reliance of research on consumer's self-reporting. Rather than accurately recording purchases, a lot of research collects data on what consumers think they purchased, or their intentions in relation to future purchases, both of which may be misleading. Research consistently suggests that there is a gap between positive attitudes towards organic food and actual purchases (Pearson et al., 2013). Research investigating the reasons why consumers do and do not purchase organic food contributes to understanding this gap and is reviewed in the following section.

2.5 Why Do People Buy Organic Food?

There is a general consensus in research on why people buy organic food. Despite slight differences related to cultural and demographic factors, the priorities enticing people to purchase organic products include, in order: personal health; product "quality"; and concern about environmental degradation (Pearson, 2002; Pearson & Henryks, 2008).

Although the scientific evidence to support a superior health claim is inconclusive — due in part to questions about the ability of currents scientific methods to measure a holistic concept such as health (Smith-Spangler et al., 2012; Dangour et al., 2009; Forman & Silverstein, 2012) consumers are motivated by the perceived health benefits of organic food. These can be subdivided into those consumers who are proactive about seeking good health (health maintenance) and those who are reactive to a negative situation (health restoration). Proactive consumers believe that organic food will have a positive impact upon their wellbeing because it is healthier. Conversely, reactive consumers purchase organic food in response to an adverse health situation. For example, someone who is ill and believes organic food may assist with their recovery.

Quality has been identified as another motivator for purchasing organic food. Research shows the quality attributes consumers generally associate with organic food include superior taste and freshness. This is particularly the case for purchases of fresh fruit and vegetables (Pearson & Rowe, 2014). However, product quality is an unreliable determinant of food choices as it can vary according to individual expectations and it often relates to a specific product, purchased under certain conditions, for a particular reason. Moreover, there is often only a tenuous link between the form of production system, organic or otherwise, and product quality.

Concern for environmental sustainability is another reason consumer's purchase organic food. Some consumers have reported they purchase organic food to support a food production system that is more sustainable in terms of having a lower negative impact on the natural environment (Lea & Worsley, 2005; Pearson, 2012 Pearson, Friel & Lawrence, 2014).

2.6 Why People Choose Not to Buy Organic Food?

Research has also identified key reasons limiting purchases of organic products. These are that they are not available where consumers do their shopping; and, in situations where they are available, they are often more expensive and/or consumers lack confidence in the organic brand (Pearson, Henryks & Jones, 2011).

2.6.1 Limited Availability

Although organic food is now available in most retail outlets in Australia, as is the case in most developed countries throughout the world, it is still not available in all. Moreover, the products available in a supermarket

tend to differ from those in a food co-operative, farmers market or similar types of retail outlets. As such, the accessibility of these different outlets will influence consumer's options.

The availability and layout of products in stores then presents a secondary range of variables that influence whether or not organic products are chosen over conventional ones. For example, a farmers market or cooperative may have a greater range of organic products relative to conventional ones, whereas supermarkets may only provide limited product lines that are organic. Moreover, the way that the organic products are laid out within the store can have an effect on decision making (Henryks & Pearson, 2012). For instance, if there is an organic product next to its conventional equivalent there may be a different consumer outcome than when all of the organic products are grouped together in one section of the retail outlet. For example, the former situation allows for easy recognition of the organic brand that may increase sales, whilst conversely the ease of price comparisons may reduce sales.

2.6.2 Price

In general, organic products sell at a higher price than conventionally produced equivalents. However, despite the general tendency for more expensive products to be purchased less, an investigation of the role that price plays in consumer purchases illustrates a number of exceptions to this generalization.

Research suggests that higher prices may not act as a deterrent to the increased consumption of certain organic product categories. The size of the premium on organic products varies; on occasions they may be available at the same price as conventional ones whilst on others it may exceed 100% (Pearson & Rowe, 2014). The reasons for these premiums are often associated with the additional costs involved at all stages in the organic supply chain.

The amount purchased relative to the price premium is determined by the nature of the specific product. For instance, many consumers tend to be more insensitive to price premiums for relatively low priced items purchased in small quantities, such as organic baby food. Conversely, consumers are more sensitive to price changes with higher value products purchased in large amounts (Pearson, 2005).

Importantly there are also somewhat unexpected cases in which the amount purchased actually increases with higher prices. For some consumers, in some situations, price is used as an indicator of product quality. For these consumers whose purchases are motivated by product quality and think that organic falls within this luxury, or high quality category, an increase in product prices may actually lead to an increase in the amount purchased.

The purchase context for many organic products also leads to a deviation from the usual trade-off relationship between higher product prices and lower amount purchased. In situations where a large number of relatively low value purchases are made on a regular basis, the price of individual products is not very important. This is the case where the majority of grocery products are purchased in supermarkets. The habits and routines that this shopping experience fosters mean consumers tend to focus more on the total cost of the overall basket of purchases rather than on that of individual products. Therefore, price premiums for some organic products may not be a substantial impediment to increasing sales.

This analysis of price suggests that the "value" consumers place on organic products is a key issue. That is, the reasons people choose conventional over organic is not always unaffordability, but because they are not valuing organic at its higher price. A marketing challenge is therefore be to demonstrate that the benefits to be obtained from purchasing organic products are worth its higher price.

2.6.3 Product Information and Labelling

The certification and branding of organic products have also been identified in the literature as important

determinants of product choices (Pearson et al., 2013). Most consumers do not have the capacity to investigate food production systems. Rather, they generally rely on reputation of retail outlet selling the product, or a label indicating organic certification. The existence and credibility of organic certification is therefore of vital importance.

The labelling of organic products also has implications for the establishment of an organic "brand" in the consumers' mind. Certification labels play a vital role in providing consumers with a degree of confidence that the organic product is genuine. In Australia there are seven independent organizations, and others for imported products, with their own logos placed on products to indicate its certified organic status. Thus consumers in Australia see different certification brands on different organic products. This is in contrast to one consistent brand on all certified organic products, which has been the case in USA for some time and has recently been implemented in the European Union (OFA, 2014).

The lack of a single brand is a limitation in achieving higher sales in Australia, as successful promotion of organic products requires clear communication of their benefits, particularly identification of them with a prominent brand. Organic foods are provided by a wide range of independent organizations, all of whom operate in competitive environments where there survival is based on being able to attract consumers in a profitable manner. In situations such as this it is challenging to co-ordinate the individual organizations and to gather sufficient funding from them to invest in a single brand. Hence it is usually achieved through government leadership, such as the international examples previously mentioned.

Investigations into why some consumers purchase organic food has also revealed consumer confusion over organic food labelling (Henryks & Pearson, 2010; Tobler et al., 2011). This confusion is evident at both a product level, and in terms of retail outlets. For example, at the product level, some people assumed that a particular brand of chicken was organic when in fact it was free range. While at the retail outlet level, some consumers assumed that all products sold at a farmers' market were organic when they were not. Additional confusion emerges when features of the organic product are in conflict with values that are important to the consumer, such as a certified organic vegetable that is not environmentally friendly as is has been airfreighted from overseas (Gifford & Bernard, 2011).

In addition, the use of the word "organic" on products that are not certified organic further diminishes the power of the organic brand, and compromises consumer's trust in it. Legislation stipulating the use of the word "organic" in the context of consumer products does not exist in most countries. However the term "certified organic" is defined in food labelling law in most developed countries. Whilst it only occurred in Australia relatively recently (2010) this development is likely to improve consumer credibility in organic as a brand.

These research findings further reinforce the importance of clear labelling. Such activities are likely to increase the amount purchased by existing organic consumers and may even contribute to enticing some conventional food consumers try organic products.

3. Conclusion

Despite continued growth in sales, and its increasing integration in to more mainstream retailing outlets, organic remains a niche in the Australian food market. Whilst progress has been made in achieving more widespread distribution of organic food products, their higher price and confusing variety of labels continues to limit increases in sales.

This review has identified evidence suggesting marketing strategies should focus on increasing the amount purchased by existing organic food consumers, who come from all demographic segments. Communications associated with these marketing strategies are likely to be most effective if they emphasize the value of organic products to justify their higher price.

Further, there are methodological issues, being a reliance on consumer self-reporting and demographic segmentation, associated with this body of research that are limiting its relevance to commercial organizations, and hence diminishing their ability to accurately target marketing efforts.

And finally continuing to build and maintain integrity of the organic brand with consumers will be necessary to fend off challenges from conventional as well as other complementary food systems such as the "local food movement". Whilst it is also relevant to state the self-evident fact that organic products will only be available for purchase whilst the organic food movement offers attractive opportunities to individuals and business at all stages in supply chain. This requires continuation of successful management of diverse stakeholders ranging from global corporates through to local production and consumption networks. Retaining credibility with government will also ensure ongoing policy support which will facilitate achieving these strategies.

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