CONSUMERS' PERCEPTIONS OF ORGANIC FOOD QUALITY

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"Raindrops on roses and whiskers on kittens"

Let me begin by acknowledging the co-author of the presentation, Angelika Meier-Ploeger. She is responsible for the serious bits. The vitriol and bile is all mine.

The word *"quality"* can be used as a noun - to mean an attribute or character. It is also used in the descriptive sense. When it is, it is taken to mean something good - a grade of excellence. Have you noticed it is never accompanied by the words *garbage or shit*? Especially when it is used by advertising people, sales people of all types (even farmers and their representatives), lobbyists, campaigners, political movements, all of them use *"quality"* to conjure images of the things that are generally thought desirable.

The image world of *"quality"* is a magical place; full of thoughts and wishes that bring smiles to the face, lumps in the throat, delightful knots in the stomach - *"Raindrops on roses, whiskers on kittens, bright copper kettles and warm woollen mittens, brown paper packages tied up with string, ...". Or in other words, "our favourite things",* which all go towards conjuring a sense of *"quality"*. There are plenty more - blue skies and white clouds, for example; motherhood; virginity; apple pie and cream; the corn as high *"as an elephants eye"*. I could almost burst into song as I buy my car, dishwasher, chocolate bar, designer drink or even organic breakfast muesli.

Even as we fall for the sting we know that the term *"quality"* has become an extremely potent marketing tool and can make the unacceptable marketable, give the commonplace a veneer of speciality and the average an aura of excellence.

This is especially so in the marketing of food because it is - to use the jargon - *"a mature market*". In other words, there is little scope for growing the market for basic foodstuffs. To keep expanding the market, processors and retailers have to come up with new products or new marketing slants on old products. Simple with cars but not so easy, one might think, with carrots. One would be wrong.

Carrots, in Europe at least, have been recreated and marketed in numerous ways. They have been selected, graded, washed, put into plastic bags, picked young and bunched - both washed and unwashed. They have been chopped, sliced, frozen and canned, grated, juiced; put into soups, pre-packed salads, ready to cook meals and, sometimes, they are sold simply as carrots.

This all has the aim of adding retail value and generally with the salespitch of enhancing *"quality"*. Some carrots, like a number of other foodstuffs, might now be approaching the zenith of being marketed with *"organic quality"*.

Organic quality?

What do those who aspire to that lofty term *"organic quality"* mean. The authors of this paper, who have been part of the international organic movement for a combined total of over thirty years, have no idea!

One assumes that it probably has something to do with certification, legislation and guaranteeing the provenance of organic produce. This is a fine and essential thing to do but associating that with the term *"quality"* is beyond our experience. The association is so devoid of real meaning that it is hard to know whether to dismiss it as completely vacuous or hail it as a stroke of marketing genius.

The phrase brings together two of the decades most favoured *"lifestyle magazine"* buzzwords without committing itself to any intelligible meaning, thereby inviting us to fill the resulting space with any image that happens to be hanging around or takes our fancy.

But, of course, because the phrase uses the word *"quality"* and the word *"organic"* that image is likely to be something *"good and desirable",* even though for most sensible people the process of certification, accreditation and legislation is boring beyond belief and so riven with grey areas, compromises and half-truths that it is extremely undesirable to know anything about it all.

Not to mention the fact that there exists a fair amount of certified organic produce whose sensoric characteristics leave much to be desired; some of which is over-packaged and overpriced; a good deal that has travelled too many, environmentally-costly miles and an uncertain amount where the social aspects of production do not bear too much scrutiny. Even so, if it is certified organic and the word quality is gratuitously attached, the process of certified production gains, by implication, a reputation of excellence that may not be deserved.

Food quality

There is an interesting, if disturbing, twist here.

A long-standing concern of a significant sector of the organic movement has been to ensure that *"food quality"* is accepted as meaning more than an assessment of the readily accessible characteristics of food. This was directed firstly against the conventional market's obsession with cosmetic characteristics and secondly against the simplistic view that organic food could be defined by the absence or otherwise of pesticide residues.

Questioning whether it was legitimate to call something a *"quality food"* simply because it looks good or tastes good if, for example, the production process damages the environment, was the direct consequence of this concern. As was the considerable effort to promote the idea that any description of food quality should include an assessment of the production methods through such approaches as life cycle analysis.

It will be ironic if we now find ourselves in the situation where compositional components of food are being ignored as a parameter of *"quality"* or, disastrously, if the wider dimensions are being limited to a consideration of whether or not a product is *"certified organic"* according to the standards and legislation currently in existence - a body of statutes which, even in IFOAM with its *"fair trade"* guidelines, is worryingly limited in scope and aspiration with regard to environmental and socio-political criteria.

Of course, within IFOAM there are many labelling schemes operating above the base level set by governments and the EU. Some are seeking to achieve high aspirations in areas of environment and socio-political issues but few operate within a comprehensive and coherent framework.

In 1989, a number of people who had been involved in various facets of considering food quality and organic production came together in a colloquium to discuss the concept of food quality and the methodologies for evaluating it. Most of these people had long associations with organic food production, research and policy. There were also some participants from the conventional sector.

A consensus was reached which agreed that any assessment of food quality or any claim of "quality" should rest on scoring highly against all of six criteria. These were :

- authenticity (which was thought would be important with the advent of genetic engineering),
- functional,
- biological,
- nutritional,
- sensual
- and ethical (which included environmental considerations).

Since then there has been some evolution of this concept which has highlighted the importance of relationships between farmers, processors and traders in the context of regional development.

It seems to us that the fundamental framework is robust and more pertinent than ever. Especially with the invidious encroachment of genetic engineering in areas where the integrity of the organic system is particularly vulnerable; food processing (enzymes, vitamins); animal feed (yeast, vitamins, soy beans, maize etc.) and seeds.

We believed then, and still do, that if organic food makes any claim to *"quality"* that implies excellence, it should be based on this conceptual framework. Indeed, if the phrase *"organic quality"* is to mean anything honourable and to be more than a cynical marketing ploy then all foods, processes or systems claiming it must fully comply with that concept.

We, the authors believe this and we are sure that a reasonable number of people within the international organic community also do. But do the consumers of organic foods? What do they perceive *"quality"* to be? Who are the consumers anyway?

The abstract consumer

Although we are all consumers, participants in discussions like this tend to count themselves out and treat the term as an *"abstract"*. In the same way that the term *"voters"* is used. Creating this distance allows us to refer to consumers in anyway we wish; as an amorphous mass; as a discriminating jury; as a sophisticated arbiter of taste; as a lump of wet clay to be moulded and shaped. We can honour and revere the abstract consumer. We can use and abuse her - for it is likely to be her unless we are dealing with cars or weapons.

Popular culture has many examples of this ambivalent approach. For example, from Nixon Waterman;

" The grocer sells me addled eggs; the tailor sells me shoddy.
I'm only a consumer and I'm not anybody.
The cobbler pegs me paper soles; the dairyman short-weights me,
I'm only a consumer and most everybody hates me."

Whereas for Noel Coward the consumer as a customer

"...'s always right, my boys.
The customer's always right.
The son-of-a-bitch, is probably rich,
so smile with all your might."

It's no good going into self-righteous denial about this.

The abstract consumer is subject to reverence, vilification and all degrees in between. Even worse, the abstract consumer is used by all interest groups, *"goodies and badies"* alike, in a tactic that is pure Machiavelli;- to provide a worthy justification for our actions.

You will recognise the type of thing - consumers would never expect ….; consumers like to see; consumers won't....., consumers will...... - always stated in an authoritative way and increasingly backed up by favourably packaged survey results from an independently sounding polling company.

This tactic is only possible because we have created and accepted the notion of the abstract consumer.

However, if we think for a moment of our own behaviour and aspirations as individual consumers, we can see that there can be significant contradictions. For example, we may want fresh food but we also want convenience; we may want healthy and wholefoods but sometimes most of us welcome a touch of champagne and canapés; we may support our local economies but hold onto aspirations and tastes that make us global shoppers.

If we recognise this and try to place ourselves within the consumer body, we instantly recognise that it is anything but an amorphous mass. It is more like a swirling, ever-changing mist of contradiction and conflict. Where certainty gives way to uncertainty, rational response become irrational and illogicality emerges as the mist is disturbed by even the simplest question.

Which is why one is tempted to say that the honest answer to questions which begin *"what is the consumers perception of "* is *"how can anyone know?"*.

However, whilst there are many differences, confusions and even conflicts that prevent us from giving a single and simple answer, there are a number of indications and recurring themes that are notable and seem to appear in all countries where a market for organic food is developing. For reasons of space and time we will concentrate on information from Germany, representing the most developed end of the market, and the UK, which until recently has been relatively undeveloped.

OK, there now follows a procession of figures which I'll go through as fast as I can. If you miss them you can catch the proceedings

Consumer choices

We should note first of all that, given ready availability at the usual shopping point and no price difference, almost everyone would be prepared to buy organic food. In a UK survey, only 4% said they would not, with 37% being "strongly in favour". Of course, this circumstance hardly ever occurs and with the general price and opportunity constraints it is hardly surprising to find the most usual buyers of organic food are from the middle and professional classes - 38% in the UK. They also tend to be active or have a strong interest in environmental, socio-political or consumer causes - around 50% of organic consumers in the UK survey.

The indications are similar in Germany where surveys show that around half of the professional and middle classes have a developed environmental consciousness and over 50% of all German consumers say they would pay more than the average conventional price for organically grown fresh produce.

It is interesting to see which types of food German consumers are willing to pay an above average price for. All the main types of organic foods come out highly; 52% for fruit and vegetables, 34% for animal products, and 39% for grain products. 35% of all consumers are willing to pay extra for products that are certified organic.

It is notable how willing German consumers say they are to pay extra to buy close to the source of production - 48% from the farm, 45% from the slaughterhouse/butcher and 33% from the local greengrocer.

However, health is, by a long way, the primary reason German consumers give for buying organic food - around 70% - while environmental concern is given as the primary reason by only between 10 and 30% of people.

In the UK, health was cited by 46% of people and *"no chemicals/pesticides"* - which can relate to both health and environment - by 41%.

Taste comes out highly in both countries - 40% in the UK and between 13 and 24% in Germany.

The strength of feeling behind some of the other reasons given seems to reflect national interests; for example animal welfare was cited as a reason by 26% of UK organic consumers; providing support for farmers was given as a significant reason by some German consumers - 17% in one study.

Vegetables are the most commonly bought type of organic product in both the UK and Germany - around 40% and 65% respectively. Fruit also scores highly in both countries - 54% in Germany and around 20% in the UK. Milk and milk products (other than cheese) are around 30% in both countries.

Otherwise, purchases seem to reflect national tastes and market development; for example nearly 50% of German organic consumers buy organic bread compared with only 15% in the UK; whilst 20% of UK organic consumers buy organic poultry products and 15% buy red meat, only around 10% of German organic consumers buy meat at all, although another 7.4% buy sausage.

I know this is getting boring but it is what the talk is meant to be about.

To help you stay awake let me revisit an anecdote which clearly demonstrates the difficulties the surround the relationship between taste, quality and consumers. A British Prime Minister,- Harold Wilson - is reputed to have said: "If I had the choice between smoked salmon and tinned salmon. I'd have it tinned. With vinegar."

OK. Back to the %. Ready?

Currently less than 3% of German organic consumers buy organically produced convenience foods (and the indications are similar for the UK). However over 60% said that they would welcome more of this type of product.

Does any of this provide evidence that the organic consumer is interested in the extended components of *"quality"* outlined earlier - the components that might justify use of the description "organic quality"?

Is the organic consumer what might be called a *"conclusive consumer"* who expects what has been described as a *"conclusive product"*? That is where the product integrity is protected by certification; where it has high nutritional value; it is produced, processed and packaged by methods that do not damage the environment; and where the impact of social and ethical dimensions of production and distribution are taken into account.

The answer seems to be *probably not*.

Whilst the UK surveys do not clearly ask about the primary reason for purchasing organic products, it does seem that, in both Germany and the UK, self-centred factors such as health and taste are more important to more organic consumers than altruistic factors such as environment, animal welfare and social considerations.

A setback for the *"organic consumer is conclusive"* case is the indication that a significant number of organic consumers would welcome *"organic convenience food"*. This - despite the increase in processing, use of additives, packaging, centralisation and food miles involved in producing such foods. And the likelihood that most processing will destroy many of the quality characteristics that the organic farming system gave to the food.

There is evidence that regular buyers of organic foods might be more discerning, thoughtful or, possibly, better educated than the *"average consumer"* and consequently more aware of environmental and socio-political issues.

Clearly some people are relating these concerns and buying choice but the majority of organic consumers seem to be primarily risk averse. The belief that organic is *"food you can trust"* and *"you can't really trust conventional food"* seems to be the dominant factor that drives the purchase of organic food.

These conclusions are given credence by the strategy followed by many companies in the organic industry of seeking to produce and sell products that look and taste as closely as possible to the conventional norm.

The problem with that strategy is that it leads directly to the need to use aids and additives that most consumers simply would not expect to find in organic systems or food and directly conflicts with their aim of avoiding a perceived risk.

It is likely that this strategy is only viable because consumers know next to nothing about the detail of organic standards and are willing to trust that a product that is certified organic conforms to a basic *"no chemicals or additives"* perception.

We would give odds that most consumers would not expect to find that over 30 additives or aids are allowed in organic food processing; even money, that they would not expect 20% of the diet of some organic animals to come from conventional sources; and a shade of odds against, that they would be surprised to find that organic poultry products can be produced on a unit with no connection to the land that supplies the hens' food as happens in the UK.

After years of involvement with standards, we know there are reasons for all of these allowances. We even believe that some of them are good. But we cannot believe that the consumer expects to find them in the organic system.

There is also a danger that allowances are too easily made and too readily given.

With the *"organic industry"* pursuing a strategy of copying the conventional, that danger is increasing the whole time. We might suddenly find we have a complete *"certified organic"* food system that organic consumers do not expect and instinctively do not trust.

Hopefully that will not happen but the possibility raises the question of where is the organic industry heading? And what relationship should it have with the organic movement?

The organic industry?

There is little doubt that a significant and possibly the most potent factor currently operating in the organic food market is the effort to mimic the type and range of mainstream foodstuffs. A necessary

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part of this is engagement in the mainstream market system with its globalisation, centralisation, packaging, promotion and purchasing practices.

The argument used to justify this effort is that this is what the consumer wants, as long as the food is certified organic. In this sense it is consumer driven but it does not reach beyond the basic level of "no chemicals/no additives" even if it is promoted with the legend of *"organic quality"*.

It does not reach out to the principles the organic movement aspires to and, therefore, in our view, does not justify the claim to the term *"organic quality"*. Unfortunately, the *"conclusive consumer"*, who would respond to efforts to give those principles shape and form, seems not, at present, to be a major player in the organic marketplace.

Also worrying is the concern that despite the fact many young people have a well developed environmental consciousness, they have not in general become organic consumers.

Surely it is not enough for the organic movement to leave it at that and accept that the organic market is going to be consumer-led by a constituency which is at the most basic and self-focused level of consciousness?

Surely the organic movement should be a route to changing consumer perceptions? And should not that part of the *"organic industry"* that sees and claims itself as part of the organic movement be the most effective vehicle on that route?

IFOAM and its members - including its corporate members needs to urgently address this and other questions that at the moment we are dancing around.

We need to climb from under the comfort blanket of the burgeoning organic market and face up to the conflict between the value of local production and consumption and the needs of some countries to export; we need to recognise the sense of limiting the range of products we certify in order to prevent the encroachment of genetic engineering and increase the environmental benefits the organic approach has to offer; we need to honestly address how the market for organic food can really bring about equitable development in all countries.

IFOAM and its members - including its corporate members - needs to develop a coherent programme for all of this and crucially an action plan for changing consumer perceptions so that when someone buys organic food they know they are buying into - joining into the organic movements principles and goals.

Ensuring that the term *"organic quality"* corresponds to the highest aspirations of the organic movement, and nothing else, is essential to bringing this about.

We must remember that the organic movement is not really in the certification business, is not really in the accreditation business, is not in the facilitating the organic trade business. These things are important but they are only tools to help us in the business that we are really in -the changing the world business.

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