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Exploring the decision-making process of Canadian organic food consumers: Motivations and trust issues

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Abstract

Purpose – Although consumption of organic food (OF) shows promising trends in Canada, there is no clear understanding of the barriers that still prevent a larger demand for OF. The main objectives of this paper are to understand what, how, where, and why Canadian consumers buy OF by exploring consumers' motivations and decision-making process, and digging into consumers' trust orientations with regards to OF.

Design/methodology/approach – In-depth interviews are conducted and data collected are analyzed using content analysis.

Findings – Results indicate that Canadian typical organic product consumers have a defined purchase scheme in terms of retail stores selection and price, as well as values and trust orientations. They identify health, the environment, and support for local farmers as their primary motivators for organic consumption. In particular, health motivation is mainly based on avoidance from chemical residues, antibiotics, hormones, genetically modified organisms, and diseases. Results also show that distribution, certification, country of origin, and labeling are all related to consumers' level of trust when consuming OF.

Research limitations/implications – Data collection was conducted in only one Canadian city and should be extended to other cities across the country.

Originality/value – This paper entails an exploration of consumer's decision-making process and their underlying motivations and trust orientations but also an investigation of the marketing mix related to OF.

Keywords Consumer behaviour, Organic foods, Motivation (psychology), Trust, Decision making, Canada

Paper type Research paper

Introduction

Organic food (OF) products have become popular in the last few years throughout the world, as the organic farming "industry" eliminates a number of concerns that consumers hold towards conventional food production. Recent research on the Canadian OF market shows relatively new promising trends regarding market acceptance, i.e. through consumers' shifts in their food consumption. However, in Canada, the OF industry and the farming industry are not yet as advanced as those in the USA and several European nations (MacRae *et al.*, 2002). It is clear that the Canadian market is different from these markets in terms of certification process, product's

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distribution structure (Sirieix *et al.*, 2004) and market life cycle (Tutunjian, 2004). As the Canadian OF market has moved from niche market to the mainstream, several strategic issues need to be addressed (Tutunjian, 2008).

On the consumer side, findings from previous research underline the need to uncover the differing mindset of consumers in countries where organic consumption is promising and enjoying rapid growth, but is likely not driven by the same values. Very little is known about Canadian OF consumers' beliefs, motivations, and values driving their decision-making process compared to their European counterparts, as cultural differences lead to different determinant values driving OF consumption. Moreover, there is a new association in consumers' mind between OF and locally produced food (Hamzaoui and Zahaf, 2008) that should be explored in depth.

Furthermore, considering the risks associated with food consumption, several risk reduction strategies can be used by consumers, all linked to information search (Mitchell and McGolrick, 1996; Brunel, 2003; Onyango *et al.*, 2007): brand loyalty, store image or label references are all means to built trust in the product. Since there are many perceived benefits but also quality issues associated to OF consumption, it is of significant interest to uncover consumers' motivations and trust orientations with regard to OF. This research aims to contribute to the OF research field by digging into those breaches. Therefore, the main objectives of this study are to understand what, how, where and especially why Canadian consumers buy OF by:

- exploring consumers' perceptions, motivations and decision-making process; and
- uncovering consumers' trust orientations with regards to OF.

Literature review

Profiling OF consumers

The issue of profiling OF consumers is rather a mature field in Europe with a well-established literature. Several studies have indeed segmented OF consumers on the basis of: attitudes toward OF and purchase intentions, demographic factors, food-related lifestyles, and frequency of purchase (Brunso and Grunert, 1998; Brunso *et al.*, 2004; Cunningham, 2001; Davis *et al.*, 1995; Fotopoulos and Krystallis, 2002; Roddy *et al.*, 1994). Based on these segmentations, scholars have profiled organic buyers to describe who they are and what their purchase intentions are (Davis *et al.*, 1995; Fotopoulos and Krystallis, 2002; Roddy *et al.*, 1994). Further, based on his observation of the OF industry, Tutunjian (2004) noticed that OF consumers share attitudes and values rather than demographics.

Whereas the majority of these studies was conducted in European countries and assessed the main factors underlying OF consumption, very little is known about Canadian consumers' knowledge, beliefs, motivations and decision-making process for OF purchase. Cunningham (2001) characterized the Canadian organic consumer profile. She reported that a total of 71 percent of Canadians have at least tried OFs. Among those people who have tried organics, 18 percent are frequent buyers, 22 percent are infrequent buyers and 31 percent are occasional buyers. However, Cunningham's findings provide just a general description of OF consumer's profile without digging into the "why" and "how" they make their purchase decisions. Further, a study conducted in Ontario shows that Ontarian are more and more looking for locally produced and home grown food products (Anonymous, 2008). There is an increasing shift in the market trends as consumers associate organic to local.

OF consumers motivations and trust

A review of the existing literature on OF consumption shows that consumers purchase OF mainly for the following reasons: OF is seen as healthier and more nutritious, no chemicals are used, tastes better than conventional food, and organic farming is kinder to the environment (Fotopoulos and Kryskallis, 2002; Larue *et al.*, 2004; Wier and Calverley, 2002; Grankvist *et al.*, 2007). Hence, to have a better knowledge of consumers' cognitive structures and their impact on purchase decision, a few studies investigated the underlying values driving OF choice behaviour for German, Italian and English consumers, using means-end theory (Baker *et al.*, 2004; Makatouni, 2002; Zanoli and Naspetti, 2002). These studies highlighted life values that fall into three main broad categories: values centered on the human being, on the environment, and on animals' well being. Although similarities emerged with respect to main values between the three studies, the dominant perceptual orientations of UK, German, and Italian OF consumers differ widely (Baker *et al.*, 2004; Makatouni, 2002; Zanoli and Naspetti, 2002). Verdurme *et al.* (2002) enforce these results by showing that cultural differences will cause consumers in different countries to have various perceptions and motivations with regard to OF.

Brunso and Grunert (1998) also developed a concept OF-related lifestyle. Food-related lifestyles include the dimensions of: ways of shopping, quality aspects, consumption situations, purchasing motives, and cooking methods. They argue that consumers, who have different food-related lifestyles, will pay attention to different product characteristics even if they share the same values. Last, the development stage of an OF market is stated by Lampkin (1992) as possibly influencing the ranking of motives to buy OF. This factor adds to the cultural differences influencing the main set of values underlying purchase decisions (Baker *et al.*, 2004). It is thus imperative to uncover which values/motivations influence behaviours of Canadian OF consumers.

Risk reduction strategies

The main reasons preventing consumers from buying OF are: too expensive, not widely available, unsatisfactory quality, satisfied with current purchases, lack of trust, limited choice, and lack of perceived value (Fotopoulos and Kryskallis, 2002; Larue *et al.*, 2004; Verdurme *et al.*, 2002; Wier and Calverly, 2002). However, this is a general trend; consumer opinions and views are still vague depending on the segment. Moreover, considering the risks associated to product consumption in general, several risk reduction strategies are used by consumers, all linked to information search (Mitchell and McGolrick, 1996; Brunel, 2003). Among these strategies, brand loyalty, store image and service, label references, and producers are all means to built trust in the product and to reduce the perceived risk linked to OF consumption.

In general, many studies showed that trust in the brand does affect trust in the product (Gurviez, 1999; Gurviez and Korchia, 2002). This also appears in some specific cases in Sirieix's study with regard to OF consumption on the French and the German markets where some OF brands are well established. But as the Canadian market is still not as developed as European organic markets, it would be interesting to identify on what consumers base their trust when buying OF. Hence, to have a more complete understanding of the OF market, it is not only crucial to explore the Canadian consumer but also to investigate the structure of the Canadian market and OF industry. This will help us understand the difference between the Canadian market and other mature markets.

The Canadian OF industry

Broadly speaking, market share of total retail food sales for OF in Canada is in the 1-2 percent range, with estimated sales at $800 million Canadian dollars in 2002. Since the mid-1990s, Canadian OF retail sales in dollar value have been growing at a rate of 20 percent per annum. It is now a billion-dollar industry that has moved from niche markets, e.g. small specialty shops, to mainstream markets, e.g. large supermarket chains (Tutunjian, 2008). At the same time, conventional food retail sales have only grown at a 3-4 percent annual rate (MacRae *et al.*, 2002). Given such an increasing demand for OFs, it is in the best interest of all producers to increase their production level to fulfill this demand. For instance, the total certified acreage in Canada increased from 840,000 acres in 2000 to 966,482 acres in 2003.

Nowadays, according to Macey (2003), organic sales of superstores represent 45-50 percent of total OF sales in the market (whereas ten years ago 95 percent of OF sales were made in specialty stores). For a long period of time, grocery retailers have experienced a vicious spiral in selling OFs. Higher prices have resulted in a limited consumer demand for OFs leading to a small sales volume (Chang *et al.*, 2005). Small sales volumes inhibited grocery retailers from splitting out the distribution cost of organic products. As a result, not only the price stayed high relative to conventional grocery products but also OF products were allocated less shelf space than conventional products. Gradually, grocery retailers have tried to respond to this issue by placing more effort on educating customers and promoting OFs. To make OFs stand out more to consumers, grocery retailers have tried either to place OFs side by side with conventional foods, or have set up a separate organic section in the store. Loblaws has also tried to promote a line of OF products under its President's Choice brand name (Rostoks, 2002; Tutunjian, 2004). Further, according to Jones *et al.* (2001) and (Tutunjian, 2008), organic retailing has moved from a niche market position to a mainstream position. Indeed, there was a clear shift from specialty stores to a more visible presence namely retail chains.

Objectives

Although consumption of organic products is becoming significant in Canada, there is no clear understanding of the barriers that still prevent a larger demand for OF on this market. In particular, a deeper knowledge about:

- consumers' perceptions, motivations and values; and
- consumers' trust orientations, will help marketers to define a more specific positioning, communication, and distribution of OF within the food chain, and develop activities capitalizing on the strength of the linkages between OF attributes and relevant personal and psychographic characteristics.

However, no study has attempted to understand in depth the behavioral process of Canadian consumers with respect to OF, or investigated the underlying causes driving their food choice. Therefore, the main objectives of this study are to:

- explore OF consumers' perceptions, motivations and values;
- explore OF consumers' trust orientations; and
- investigate the main distribution variables influencing OF consumers decision-making process.

The remainder of the paper is organized as follows: in the next sections we describe the research methodology and present research results. This is followed by a discussion of results and some concluding remarks are made.

Methodology

Research procedure

For the purpose of this study, in-depth interviews were conducted. Before commencing the in-depth interviews, care was taken to create a relaxed environment. More specifically, in-depth interviews attempted to explore issues like motivations for buying and consuming organic products, values related to OF, perceived advantages and disadvantages of OF, willingness to pay (WTP) a "premium" price, selection of organic products, ease in identifying organic products, availability of organic products, and trust of OF offered on the market, and perception of labeling and certification of OF.

Participants also were asked to give their opinion regarding the different types of OF products available in the market and to express their concern with regard to these products. This gave an insight on how they adapted their food habits and changed their food choice behaviour. Participants' perceptions of OF helped shaping the overall image they have of these products. To conclude, participants were asked to express what they considered the most important characteristics in OF, what improvements in OF they would like to see, and finally, they where invited to share any comments or suggestions about the discussion.

Sample

Our sample was composed of 21 subjects who took part in one-hour in-depth interviews (see Table I for more details). The selection of the participants was based on a screening questionnaire to ensure that all participants met the defined criteria of this research. OF knowledge was a prerequisite for participants' selection as well as being in charge of household grocery/food purchases. Participants had to be regular, occasional, or irregular and had to consume at least two out of six named OF products in the screening questionnaire including products such as fruits, vegetables, meat, dairy, breads, and prepared food. Half of the respondents were recruited from organic specialized stores and half from conventional grocery stores carrying OFs based in Ottawa. Participants were offered a cash incentive to participate. Age and gender were not criteria of selection.

It is readily seen in Table I that the majority of these respondents belong to the 20-35 age bracket with an even representation of males and females. The bulk of the respondents are regular users (13), three are irregular users, and finally, five are occasional users. Further, all irregular users are students, and all regular users have somewhat a "green" lifestyle.

Analysis

Results were obtained by the analysis of verbatim transcripts of the audio-taped interviews. All in-depth interviews were indeed recorded and transcribed to capture,

Consumers	Gender	Age	Occupation	Purchase location
Regular	Male	25/30	Part time worker at the Wheatberry	Specialty stores
	Fem.	70/75	Consumer – retired	Specialty stores/open markets
	Fem.	20/25	Student	Specialty stores
	Male	20/25	Part time worker at The Green Door	Specialty stores
	Fem.	25/30	Works at specialty store (Orleans)	Specialty stores/open markets
	Fem.	25/30	Not available	Open markets
	Male	25/30	Works at The Green Door	Specialty stores
	Fem.	25/30	Nutritionist	Specialty stores/open markets
	Male	40/45	Biologist	Specialty stores/open markets
	Fem.	30/35	Professor	Specialty stores/open markets
	Male	30/35	Massage therapist	Specialty stores
	Male	20/25	Works at Wheatberry	Specialty stores
	Male	530/55	Government employee	Superstores/spec. stores
Occasional	Male	30/35	Part time worker at The Green Door	Specialty stores
	Male	25/30	Student	Superstores
	Male	25/30	Student	Superstores
	Male	25/30	Cinema	Superstores
	Fem.	45/50	Government employee	Superstores/spec. stores
Irregular	Male	25/30	Student	Superstores
	Fem.	20/25	Student	Superstores
	Fem.	20/25	Student	Superstores

Table I.
Sample characteristics

with minimal bias, the perceptions, motivations, values, and trust orientations underlying decision-making process with regard to OF. Data collected were analyzed using content analysis. Data were organized around particular themes, on a judgmental basis, that were coded and categorized in order to facilitate their interpretation. Content analysis and coding of the data was performed according to the relevant literature (Kassarjian, 1977). Two separate judges coded the data. The interrater reliability between the coders was 92 percent, which is above the satisfactory level of 85 percent agreement (Kassarjian, 1977).

A list of 14 themes was determined and all 14 themes were grouped into five main categories measuring the what, where, how to recognize, why, and trust with regard to OF (Table II). Themes and sub-themes have been chosen using a simple algorithm:

- sub-themes are exclusive to the theme they belong to meaning that a sub-theme cannot be part of two different themes; and
- all themes are a by-product of the research objectives and clearly mirror the spirit of the interviews.

Results

Results of our content analysis are presented here following the five main themes categories measuring:

- what and where consumers buy OF, and how they recognize OF;
- why they buy OF; and
- consumers' trust orientations.

Theme	Sub-themes	Record[a]	Definition
What to buy?			
Food	Food content, food production method, nutrition, quality, taste, natural, safety, no pesticides, no fertilizers, no chemicals, flavor, no GMO, not uniform shape, certified, not mass produced	92	OF product most important attributes
Food categories	Fruits, vegetables, meat, dairy, breads, prepared food, and other	22	Main OF categories consumed by the respondents
Improvements	Availability, convenience, and variety	15	Main improvements proposed by respondents
Where to buy and how much to pay?			
Distribution	Supermarkets, OF stores, health stores, and market place	21	Main store categories where OF product are usually sold
Pricing	Budget/constraints, benefit/price, faire trade issues, conventional/organic	18	Main factors influencing price perception and the purchase of OF
How to recognize?			
Certification	Certifying bodies, certifying manufacturers	10	Knowledge with regards to certificating bodies
Labeling	Information about the product, brand name, certifying bodies	11	Importance of the information on the packaging
Why to buy?			
Environment	Soil preservation, animal welfare, and living organism preservation	19	Main environmental issues related to OF consumption
Health	Disease avoidance, physical well being	19	Main health reasons related to OF consumption
Lifestyle	Vegetarian, spiritualism, naturalism, peaceful, and social status	18	Type of lifestyle corresponding the OF consumers
Benefits	Energy, emotional side, and happiness	7	Main benefits of consuming OF

Note: [a]Number of times the sub-themes have been mentioned by respondents during in-depth interviews

Table II. Themes classification

Based on our coding scheme and on the findings from in-depth interviews, we started to define a first profile of the OF consumer. Combining consumers' categories used in the screening process, i.e. regular, occasional, and irregular, to our findings allows us to consider two main types of consumers. We shall from now on refer to regular OF consumer as typical organic products consumers, namely typical organic product consumer (TOPC), while occasional and irregular buyers will be referred to as non-TOPC.

What to buy?

This category is composed of three main themes, namely characteristics of OF products, food categories, and improvement proposed by respondents. Further, these themes are regrouping 25 sub-themes covering all aspects of OF products' attributes, most consumed OF categories, and proposed changes by respondents to improve the quality of OF products.

OF product attributes and food categories. First of all, consumers have indeed said that, compared to regular products, that OF products are more nutritious, tasty, look better, are fresher, and do not have a uniform shape. Moreover, TOPC position OF products as "pesticides free," "hormone free," "no chemicals," "no pollutants," "no antibiotics," "no genetically modified organisms," and thus are "natural." Basically, these consumers support all "non-mass marketed" products.

Characteristically, TOPC consumers are more geared toward vegetables and dairy products. Some of them are non-food products consumers, e.g. organic clothes or organic toys. Meat is not a major purchase because most of TOPC have a vegetarian lifestyle. Fruits and vegetables were listed as a major purchase, although their prices tend to vary and be quite high compared to conventional fruits and vegetables. TOPC also limit their purchases to fresh products and tend to prepare their meals, considering it is the healthiest way to eat. Non-TOPC seem more interested by prepared food and snacks, which might be a first step in their conversion from conventional to OF.

Improvements proposed by respondents. Having said that, it is worth noticing that because of their knowledge about these products, TOPC proposed a set of improvements: variety, availability, price reduction, and more education. These are the most important concerns. Basically, we have three main marketing mix issues, namely distribution, promotion and price. Consumers want "bigger stores and sections" with more product lines, and more education with respect to OF products from superstores such as Loblaws and the media. There is a general belief that more education will lead to better knowledge and greater consumption, and a higher demand will ultimately lead to a greater supply, which will consequently lower prices for the end-consumer. Finally, some respondents even spoke about "bio-dynamics," a new concept that is meant to replace organic agriculture. Conversely, non-TOPCs are located at a different stage of their learning curve. They have a basic knowledge about organic products; they have tried these products but do not seem to be fully committed to steady purchases. Basically, it is a "preference." Some non-TOPCs have a hybrid purchase profile. They buy certain categories of products and not others. For instance, they might choose fruits over meat because of price differentials.

Where to buy?

After analyzing what consumers buy, we looked at where they buy (distribution channels), and how much they are ready to pay for OF. Both dimensions were composed of eight sub-themes measuring where consumers buy their OF products and how they perceive the OF price-purchase combination.

Distribution channels. Consumers mentioned three main types of distribution channels they shop from: open markets, specialty stores, and superstores like Loblaws (Table III).

A fourth alternative was mentioned and is used by a minority of TOPC, which is "Co-ops" or weekly baskets delivered directly from farmers to consumers' home, or greenhouses. Buying from open markets or directly from farms is supported by "for sure that's top quality," "supporting local farmers," "ensures that the coop has a guaranteed income," and being able to talk to the farmers about the products. Through these statements, consumers showed that they perceive consumption and production as linked, which also explains the importance of products' sourcing as well as the

Table III. Food distribution by store categories in Ottawa

	Vegetables	Fruits	Prepared food	Dairy	Meat
	Number of products carried by food category				
Specialty stores					
The Wheatberry	36	13	60	15	0
Natural food pantry	3	7	19	17	7
Pantry plus foods	12	11	9	14	16
Superstores					
Loblaws Ogilvie	19	8	42	62	1
Loblaws Rideau	17	18	3	23	1
Loblaws Baseline	18	14	42	56	0
Average price					
Example of product	Onions (kg)	Apples (kg)	Vegetarian pizza	Milk 1%/1l	Chicken legs (kg)
Organic[a] ($)	4.21	4.21	8.79	2.78	11.59
Conventional ($)	2.18	2.50	5.99	1.45	6.37

Note: [a]Based on the price in each store for the selected product

benefits for the producers. Further, this gives an idea about TOPC's trust and motivation structure.

On the other hand, non-TOPC buy from superstores mainly for convenience reasons (proximity, opening hours, etc.). In superstore, consumers find a growing organic section carrying the products they usually buy like fruits and vegetables. Conversely, TOPC rarely shop at superstores since these stores "don't have assigned staff for organic information for their customers." Consumers do not like the fact that in superstores "it's all packaged in little plastic bags and plastic is not very good." Specialty stores are then positively perceived because of their "more knowledgeable staff." This confirms Sirieix and Schaer (2005) results, i.e. TOPC are looking more for quality, competence, sharing of similar values than for attractive prices. Availability and variety also seem to satisfy consumers in this type of stores.

WTP for OF. Consumers generally agree that OF is more expensive than conventional food, but the price difference varies with the product categories, e.g. "bananas might only be 20 cents more expensive" while "for ginger root, you'll pay at least three times the amount." TOPC choose to "spend on organic in order to put the healthiest food possible in my body," and do reallocate their budget in order to meet their diet objective. This is in accordance with the results presented by Laroche *et al.* (2001). Quality of products, and trust in the certification seem to influence their higher WTP for OF. These factors are also highlighted by Krystallis and Chryssohoidis (2005). But results of their study show that trust in brand name influences consumer's WTP, which did not appear in our study. This might be explained by the more mature European market having established brands that are trusted by OF consumers.

Non-TOPC prefer shopping at Loblaws mainly for cheaper prices, the cost being definitely a barrier especially for students or average income persons. Furthermore, non-TOPC tend to be more "regular" consumers during the summer when less expensive products are available with a wider variety than during winter. They expect that both competition and a higher supply of OF will have an impact on prices, and therefore making these products more affordable. Presently, these consumers have to make a trade-off between price and product information when deciding whether to shop at a superstore or a specialty store.

How to recognize?

Beside some organic product characteristics mentioned previously, all consumers look for the certification and the label when buying OF. These two themes were sub-categorized into five sub-themes capturing the type of certification and the certifying body, and also all the information provided in the OF labels.

Labeling. Interviewees are divided in two groups as to how they read labels and tend to recognize OF. TOPC do know the labels and recognize the different ones available on the market. Some of these consumers highlight the difference that exists between organically grown and organically processed. They tend to read the labels to know the ingredients of prepared OF. Non-TOPC just tend to trust the labels, but do not pay attention to ingredients as they are not knowledgeable about it.

Certification. In terms of certification, most consumers do not know the exact process farmers have to go through to get their products certified. TOPC also cite with high regards the European example for their labeling and certification processes, and regulations that control the OF industry. Trusting the certification process is more important for consumers as they note the rapid growth of big distribution channels in the organic market.

Why to buy?

In the previous section we have described the ideal OF product for TOPC, where OF consumers buy and how they recognize OF products. Now, we have to investigate the motives behind organic products purchase. This has been captured by five main themes, namely environmental reasons, health reasons, lifestyle, benefits of OF, and other general reasons.

Lifestyle. As mentioned above, the majority of the interviewed TOPC appeared to be vegetarian. This lifestyle encompasses a variety of motivational elements. For instance, ethical considerations, spiritualism, and naturalism are some of the most important ones. TOPC are indeed looking for a harmonious life and also for equilibrium with the environment. Others picture this equilibrium in a "vegan lifestyle." In fact, consuming OF products provides them with happiness, joy, and energy. It seems also that the organic lifestyle is based on trust between consumers and producers/farmers. Since these farmers are not profit driven then they won't mass produce. "Supporting local farmers" represents indeed an important reason to purchase an OF product.

Environmental reasons. Some of these consumers are also concerned with the ecological side of organic farming. They see in this practice a more sustainable production mode than standard agriculture practices. TOPC are also concerned with micro-environmental issues such as animal welfare and living organism preservation. Nevertheless, environmental motives were important but not crucial. Further, TOPC think that once profit is the ultimate objective, the rationale behind producing quality food products vanishes. The production process will indeed lead to the use of more cost effective methods of production. "The principal goal of organic production is to develop enterprises that are sustainable and harmonious with the environment" (Canadian Organic Growers). This argument will be reinforced when we will speak about trust.

Health and OF benefits. When asked to rank the main reasons to buy OF, respondents have clearly categorized health as a major reason. In fact, many respondent mentioned "health consciousness;" one respondent statement summarizes clearly this idea, "I'm eating healthy because I'm eating organic." Some respondents "switched" to OF consumption because of health problems. Basically, it was more of an obligation than a choice. Conversely, others made the choice of consuming organic because of relatives or friends influence. But interestingly, fear from genetically modified organism (GMOs), chemical residues from pesticides, pollutants, diseases, etc. seems to lead consumers' health motivation. They are consuming organic in order to avoid specific elements more than they are consuming OF in order to approach some direct perceived benefits.

Main general reasons. In comparison, studies conducted in Europe showed that German's dominant perceptual orientation are health and enjoyment, belief in nature, and animal welfare whereas UK consumers express values related to health, to animals, and to the environment in the sense that by protecting the environment, interviewed parents believe they can protect their families' well being (Makatouni, 2002). Interestingly, these beliefs correspond to what Browne *et al.* (2000) identified in their study as concerns of ethical consumers (own and families' health, environment, animal welfare, and helping people). Conversely, health, environment, and supporting local farmers appear to be the main consumers' motivations for OF consumption in this study.

Consumers' trust orientations

Two main themes will be studied here:

(1) trust related to the points of sale and source or production; and

(2) trusted sources of information.

Trust. First, the issues on distribution and price are linked to how much consumers trust the products available on the market and the sources of production, "it depends who is making it, and where it's being sold," "the organic industry is still an industry so they want people to buy their products, they want to make money." In terms of distribution, the highest degree of trust is towards local farmers, as consumers can get more information about the products. This gives a clear indication to TOPC about who they are dealing with, i.e. "see their lifestyles" or "I like their morals," which is directly linked to sharing several ethical values. Superstores are not the best rated in trust terms but people shopping there say that "you just have to trust the label." Specialty stores are positioned in between as "smaller stores have more committed customers, they seem to be more trustworthy" and "in smaller stores they do order organic products, and they don't want to be sued." Nevertheless, the main positive aspect consumers see in superstores offering OF is that it is still the best way to expose people to organic products, "consumers could get more willing to experiment," and make them more aware of the quality of what they are eating and how it can affect their body.

But as the trend is growing, TOPC mainly do not trust large producers and large distributors, "large companies have jumped on the organic bandwagon, I can't really trust them" and "now even Wal-Mart is looking to go organic." They do not believe that big companies can do ethical trade by providing OF and still make profits at the same time. They also expressed a lack of trust in organic companies shipping their products from outside Canada, mainly because products are then exposed to plastic, fuel emissions, etc. reducing the product's quality. Generally speaking, TOPC think that "people are too trusting of the food that is being sold to us, people need to be more aware." Second, the level of trust for non-TOPC is quite high for what is offered on the market as they are trying to consume organic. In fact, they do not have the time to investigate whether it is organic or not and learn more about it.

Sources of information. TOPC like chatting with other consumers, subscribing to newsletters, considering that the most authoritative sources are doctors, and take the time through readings and internet searches, to research information related to OF. But the best way to be informed is certainly education, which they believe is a way to keep the manufacturers in check. Finally, as mentioned in the section on "How to recognize," consumers also show some degree of trust in the certification label (and indirectly with the country of origin of some imported certified organic products). This becomes an issue for the TOPC with imported products, but also with the increasing importance of big distribution channels in the organic market.

Decision-making process model

The abovementioned results are summarized in the following proposition of decision-making process model. It integrates all trust and motivation dimensions as well as the marketing mix dimension, i.e. the product (what to buy), the place and the price (where to buy), and promotion (how to recognize) (Figure 1).

Basically, consumers are driven by several cues and motives to buy OF products. These motivations are translated into product choice in terms of product preferences, labeling, and certification of the product. This makes the basis of consumers' trust orientation. Once this preliminary search-analyses-choice phase is finished, consumers are ready to choose not only what they are going to buy but also where they are going to buy that product.

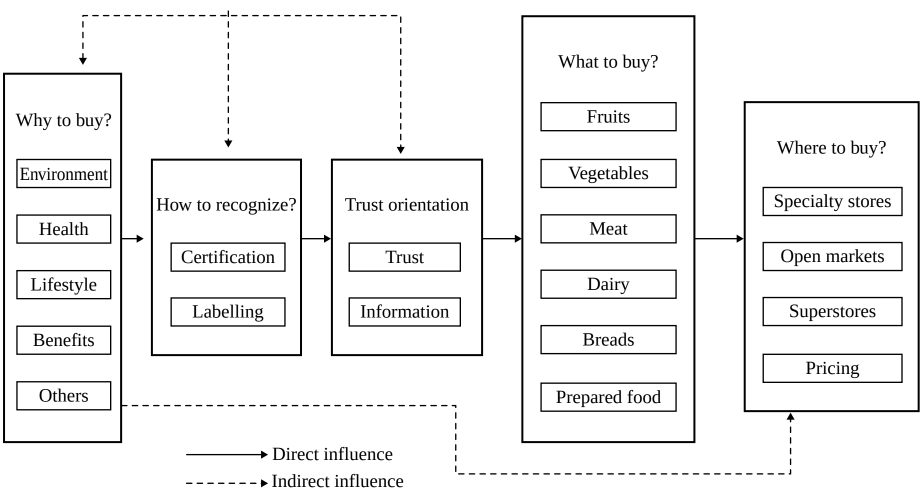

Figure 1.
Conceptual model of Canadian OF buyers

Discussion

Analyzing the in-depth interviews allowed us to highlight interesting aspects of OF consumption, mainly how OF is defined, what the main consumers' motivations and trust orientations are, and what factors affect their decision-making process.

The main motivator for purchasing OF is clearly health followed by environmental motives (and animal welfare for those consuming meat). These major reasons for consuming OF are common to several studies (Baker *et al.*, 2004; Zanoli and Naspetti, 2002), although their respective degree of importance varies from one country to another. Interestingly, support for local farmers is a social responsible behaviour that motivates consumers; previous research works on OF consumption does not sustain this among the most important reasons for consuming OF. This is mainly based on the consumer-farmer trust relationship. Further, supporting local farmers is somehow linked to the product-distribution issue. Consumers are indeed looking for shorter distribution channels, as they are more and more concerned about the issue of food mileage. Being able to buy local or national products ensures not only high quality products, but also fresh and nutritious products.

Generally speaking, OF consumption is here associated more with chemicals avoidance than nutritional benefits. Health motivation is thus more an avoidance motivation than an approach motivation like "to support local farmers" motivation. The key associations to health are naturalness, more safety, and healthiness. All of them help:

- attaining a healthy life;
- enhancing life quality; and
- enforcing social values, such as responsibility for family, nature and animal welfare.

The results reveal also that there was only a minority of TOPC who valued other perceived benefits of OF, namely its nutritional value. These beliefs are mainly driven by consumers' respective personal knowledge, the type and source of information consumers are actively obtaining or being exposed to. Conversely, non-TOPC took a more individualistic approach to OF consumption, as they were primarily and mainly motivated by a general health concern.

Distribution, price, certification and labeling are all linked to consumers' level of trust when consuming OFs. This is mainly related to the level of skepticism that is currently embedded in the Canadian organic industry. Interestingly, TOPC expressed a greater level of trust for local farmers, and a preference for distribution through open markets, like their German and French counterparts (Sirieix and Schaer, 2005). Another common attitudinal factor is "quality standards." Consumers emphasize the importance of high standards of production, even though they still do not know to what degree the Canadian certification process is controlled, and would like to have more information about it. Organic consumers in general want to learn more about the source of their products and the production practices it is produced under. TOPC are developing a greater level of trust and confidence for specific organic certifications. Actually, they were not only able to name some of these organic certifications but they also express some preferences for. Non-TOPC, being at an early stage of their learning curve, just relied on what is labeled as being organic. The issue of quality standards also arises when considering imports of organic products, and is consistent with Padel and Foster (2005) results. Other countries are indeed perceived as not meeting the same organic certification requirements as Canada. Consumers expect Canadian organizations to exert some degree of certification control on these products before distributing them on the market. This represents clearly a way to increase the level of trust towards OF products, distribution channels and distributors' organic brands.

Finally, in this study, TOPC are somehow vegetarian, care about the environment, are health conscious, buy OF to support local farmers, do not trust big corporations, and are willing to pay a premium price to purchase OF products.

Conclusion

Our in-depth interviews allowed us to reach several conclusions with respect to organic consumers, their attitudes towards the OF industry and the products it offers. The following conclusions were reached.

It is clear that the OF sector has drastically evolved during the last decade. However, discussions clearly indicate that some barriers limiting a larger consumption of OF are:

- consumers' lack of knowledge and trust with regards to OF products;
- high prices making these products less attractive; and
- a weak distribution system not allowing for availability of all OF on stores shelves and providing a limited OF variety of product lines carried by grocery stores.

This is also embedded in the existence of these main OF consumption paths, consuming for health reasons, preserving the environment, supporting local farmers, and consuming as a trend. Most motivations for buying organic highlight that OF consumers tend to be more or less ethical consumers.

It is also obvious that there is a need to develop clear and consistent industry standards and certification process that can be initiated by consumer pressure. Hence, a trust relationship should be set in the marketplace allowing marketers of OF to develop a consistent message to consumers so they will be offered a reliable product and reinforce their perceptions and attitudes toward OF. A consistency among OF suppliers in Canada will give consumers a greater level of expectations when buying/consuming OF. Trust towards the retailers and the certification process (and indirectly the country of origin of the product) are important determinants of OF consumption. Increased confidence should result in greater industry sales as consumers will be more confident with their decision to pay a higher price for what would be formally known as a higher quality product.

Implications for managers and policy makers

For marketers, as well as for OF producers and retailers, there are here:

- an explanation of major barriers that continue to limit the demand for OF in the Canadian market; and
- a description of the structure of the Canadian OF market.

This will have direct implications at the provincial and federal levels, i.e. clarifies the actual situation in the Canadian OF market and pinpoints potential means to develop sustainable strategies that help farmers and producers competing in the actual market. In particular, a deeper understanding of perceptions, motivations, and trust orientations of the different types of OF consumers will guide managers to focus on specific trust builders such as certification, labelling, branding, as well as product origin and define more specific strategies in terms of positioning and communicating their offer of OF products. It will also help them develop activities based on the strength of the linkages between OF attributes and relevant personal and psychographic characteristics.

Limitations and future research

Lastly, this research has one major limit. The interviews have been conducted in Ottawa (Ontario), hence, not taking into account the situation in other provinces. Further, our small sample was not very heterogeneous in terms of age and ethnic groups. It would be interesting to consider different major urban city centers located in different provinces to picture the trends at the country level. This research is exploratory and highlights the need to carry out qualitative and conclusive studies in order to generate not only concepts clarifications but also hypothesis and answers regarding Canadian organic consumers using quantitative approaches. This will in turn help to address implications of the consumer food consumption behaviour for management and public policies.

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