



# A concept mapping study on organic food consumers in Shanghai, China



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## ABSTRACT

Despite some similarities with developed countries, the growth of organic market in China seems to follow a different path. Thus, important questions are how Chinese urban consumers perceive organic food, and what are the main concepts associated to the organic attribute.

We aimed at representing in graphic form the network of mental associations with the organic concept. We used an adapted version of the “Brand concept mapping” method to acquire, process, and draw individual concept networks perceived by 50 organic food consumers in Shanghai. We then analyzed the data using network and cluster analysis to create aggregated maps for two distinct groups of consumers.

Similarly to their peers in developed countries, Chinese consumers perceive organic food as healthy, safe and expensive. However, organic is not necessarily synonymous with natural produce in China, also due to a translation of the term that conveys the idea of a “technology advanced” product. Organic overlaps with the green food label in terms of image and positioning in the market, since they are easily associated and often confused. The two groups we identified show clear differences in the way the organic concept is associated to other concepts and features.

The study provides useful information for practitioners: marketers of organic products in China should invest in communication to emphasize the differences with Green Food products and they should consider the possibility of segmenting organic consumers; Chinese policy makers should consider implementing information campaigns aimed at achieving a better understanding of the features of these quality labels among consumers. For researchers, the study confirms that the BCM method is effective and its integration with network and cluster analysis improves the interpretation of individual and aggregated maps.

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## 1. Introduction

The development of the organic market in China is in its early phase. The implementation of the national standard supported organic farming growth, and currently China is the country with the fourth largest area of certified organic land in the world, although the share (0.37%) of agricultural land under organic farming is still very small (Willer & Lernoud, 2016). However,

despite organic farming in China having increased dramatically, it is largely an export-oriented industry (Taylor, 2008).

Chinese culture differs significantly from western and other Asian cultures, so consumers have different values and a different perception of product attributes (Del Giudice, Caracciolo, Cicia, Grunert, & Krystallis, 2012; Hasimu, Marchesini, & Canavari, 2008); for this reason, similar purchasing behaviors may underline different motivations from those that might be expected by western observers. Studying directly the issue of organic perception in China is also important due to the unique situation of the market. Although growing fast, the organic market in China is still a niche, and it has not reached a mature identity (the domestic market share of organic food was less than 0.4% in 2007, and reached an estimated 1% share in 2012). Moreover, its shape is still

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affected by the continuous food crises and scandals that strike the country (not to mention the problem of fraud, which remains an ever-present concern in China, with companies falsely advertising pesticide-treated produce as organic), hence the changes it is undergoing in the minds of consumers are worth monitoring. These matters of fact erode enforcement capacity and consumer confidence towards local productions, both of which are essential for a functional organic certification system. Food safety is therefore an ever-present concern for a large share of consumers in China (Wang, De Steur, Gellynck, & Verbeke, 2014; Wu, Wang, Zhu, Hu, & Wang, 2016; Wu, Yin, Xu, & Zhu, 2014; Wu, Zhong, Shan, & Qin, 2013). Finally, the value-added and quality food market in China is also characterized by the presence of certifications that are present only in this country, and that “compete” with organic in terms of market positioning and image (i.e., the Chinese Green Food label). Perrea et al. (2014) analyzed Green food in China using a hierarchical values-attitudes model and they show that Green food is actually perceived by consumers as safer to consume, and that a positive perception of both food safety and environmental friendliness is linked to technology. Other “safe food” labels and their interaction with organic food have been studied by Liu, Pieniak, and Verbeke (2013), who highlighted consumers’ limited knowledge and low recognition of the relevant labels.

Therefore, the growth of the organic food market in China’s emerging economy seems to follow a different path of development compared to countries where the organic industry is now well established. In the latter countries, organic farming and organic food were initially popular among consumers mainly motivated by ethical and environment-related concerns, which later became more and more popular among mainstream consumers. In this situation, it is reasonable to assume that motivations, beliefs and attitudes of Chinese consumers may differ from those of consumers in developed countries. Thus, it is important to explore how Chinese urban consumers perceive the organic attribute for food and what are the main concepts associated with purchasing and consuming these products.

While a large number and variety of studies on organic consumers in Europe, USA and Australia and extensive reviews are available (Aertsens, Verbeke, Mondelaers, & Van Huylenbroeck, 2009; Aschemann-Witzel & Zielke, 2015; Dimitri & Dettmann, 2012; Hemmerling, Hamm, & Spiller, 2015; Schleenbecker & Hamm, 2013; Yiridoe, Bonti-Ankomah, & Martin, 2005), comparatively little is known about consumers’ perception of organic foods in Asia (Bayaah & Juhdi, 2010; Canavari & Wongprawmas, 2012; Darby, Batte, Ernst, & Roe, 2008; Lombardi et al., 2010, pp. 127–140; Moen, 1997; Nelson, 1991; Roitner-Schobesberger, Darnhofer, Somsok, & Vogl, 2008), and not much information is also available for China from the existing literature.

Some of the available papers summarize the stages of development of the Chinese organic and green food industry in China, describing production bases, market conditions, international trade, and certification systems (Lu, 2002; Marchesini, Hasimu, & Spadoni, 2010, pp. 155–172; Sheng, Shen, Qiao, Yu, & Fan, 2009; Xie, Li, & Yi, 2011). These authors largely agree that the growth of organic food consumption is due to the growing affluence of Chinese consumers, a rapid development of living standards, an expanding community of foreigners, and increasing concern on food safety.

Other works focus on organic farming, considering mainly issues related to production and rural development (Giovannucci, 2005; Oelofse et al., 2010; Thiers, 2002).

Some previous works use quantitative methods based on consumer surveys to analyze consumers’ attitudes and expectations (Loebnitz & Aschemann-Witzel, 2016; Zhou & Chen, 2007), purchase intentions (Chen, Lobo, & Rajendran, 2014; Chen & Lobo,

2012; McCarthy, Liu, & Chen, 2015; Thøgersen, de Barcellos, Perin, & Zhou, 2015; Thøgersen, Zhou, & Huang, 2015; Thøgersen & Zhou, 2012; Xie, Wang, Yang, Wang, & Zhang, 2015; Yin, Wu, Du, & Chen, 2010; Zhou, Thøgersen, Ruan, & Huang, 2013), and willingness to pay (Wu et al., 2014). Results show a positive attitude towards, organic food, but findings regarding the relevant factors affecting consumer interest for organic food are mixed. Many papers agree that health and food safety concern plays a relevant role (McCarthy et al., 2015; Xie et al., 2015; Yin et al., 2010), and price is the most important factor hindering purchase (Loebnitz & Aschemann-Witzel, 2016; Xie et al., 2015; Yin et al., 2010). Intentions are found to be influenced also by income and other socio-demographic characteristics of consumers (Chen et al., 2014; Xie et al., 2015; Yin et al., 2010), and some papers find evidence of relevance of other aspects, such as environmental and ethical concern (McCarthy et al., 2015), certification and regulation, product quality, consumer lifestyles and values (Chen & Lobo, 2012; Zhou et al., 2013), trust (Thøgersen, de Barcellos et al., 2015; Thøgersen, Zhou, et al., 2015; Thøgersen & Zhou, 2012; Yin et al., 2010; Zhou et al., 2013), knowledge and availability (Xie et al., 2015). Wu et al. (2014) discover that foreign certifications are preferred to the national ones.

We found only one qualitative paper by Sirieix, Kledal, and Sulitang (2011) that contrast local and imported organic foods asking for opinions from 23 consumers in Shanghai, using open-ended questions together with projective techniques. They find that local products are preferred to imported ones (in contrast with Wu et al. (2014)) and they confirm that health concern is the primary reason for consuming organic products, while high price is the main barrier preventing purchase of organic products. Differently from what is commonly found analyzing motives of organic consumers in western countries, little relevance is assigned to altruistic motives and ethical aspects such as environment protection.

At the best of our knowledge, a study aimed at offering an in-depth exploration of Chinese consumers’ perceptions of organic food is still missing, and with this research we aim to fill this gap.

Organic food products are highly-symbolic, and perceived mainly on the basis of credence attributes (Grolleau & Caswell, 2006; Wirth, Stanton, & Wiley, 2011). Extrinsic indicators (e. g. certification, labeling) and cues (e.g. brand name, packaging, price) convey search information. However, these information sources consumers depend on are external, since there is no ability to evaluate the quality through consumption, and purchase is driven by consumers’ belief systems, that are a set of mutually supportive beliefs (Minton & Khale, 2014). Such belief systems encompass product knowledge, as well as fundamental existential values, emotions, and ethics. According to Anderson (1983), these associations are organized in a network manner that is consistent with associative network models of memory. As psychological models, networks entail the assumption that concepts as well as their relations can be represented by a structure consisting of nodes (concepts) and links (relations). Strengths of relations are reflected by link weights, and the meaning of a concept is determined by its connections to other concepts (Schvaneveldt, Durso, & Dearholt, 1989). Networks can be used to represent heterogeneous sets of relations on concepts, which in this case we assume that the links have a semantic interpretation such as those found in semantic networks (Collins & Loftus, 1975; Meyer & Schvaneveldt, 1976; Quillian, 1969). Networks of concepts can be graphically represented using concept maps, which are graphical tools for organizing and representing knowledge (Novak & Cañas, 2008). These graphical representations offer the potential for identifying the structure of relationships among concepts, helping to reveal patterns in data that may lead to fruitful interpretations (Schvaneveldt

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