



Fresh perspective

Consumers are rewriting the definition of quality—but theirs might not match yours.

By Harvey Hartman

You don't need to read tea leaves to see it. Through subtle shifts in behavior, consumers are showing us that their perceptions of what "quality" means will significantly reshape the food marketplace in 2008. One of the most outward signs of this macro-trend is the movement toward "all things fresh." But that's not as simple to grasp—or merchandise to—as it sounds.

Developments falling loosely under the rubric of "fresh" are already fundamentally transforming the food business, with center store under permanent siege by perimeter departments, the traditional domain of fresh. But the industry's understanding and consumers' perception of what fresh means are on divergent courses. In our ongoing dialogue with marketers, product managers, and retailers, we're continuously surprised to discover that many maintain a literal, commonsense interpretation of the word "fresh," referring to an objective status or distinction, with a definition that goes something like this:

Fresh foods are those in their most natural state, without any processing or preservatives and minimal, if any, packaging.

According to this perspective, case-ready meats are fresh, while packaged salami isn't so fresh. Hot soup available to go in the deli is fresh, while packaged soup in a refrigerated cooler isn't so fresh. And finally, an ear of corn in the produce section is fresh, while frozen corn is most certainly not (so fresh).

In short, fresh appears to be a fundamental, product-level distinction resistant to further nuance. With this trend toward "all things fresh" then, how best can one market to this phenomenon?

One of the most consistent, compelling findings to emerge from our years of consumer research regarding food, eating habits, and shopping behavior suggests that—at least for consumers—the word "fresh" is actually a complex indicator of broader lifestyle orientations toward food quality, rather than an objective food distinction.

The quality continuum

Hartman says the meaning of 'quality' passes from one group to the next.

	CORE	MIDLEVEL	PERIPHERY
PAST	ORGANIC	NATURAL	LEGACY
PRESENT	LOCAL	FRESH	ORGANIC NATURAL
FUTURE	?	LOCAL	FRESH ORGANIC

How consumers define it changes over time and with their level of commitment to the food world.

But to better understand the critical role fresh plays for today's consumer, it's important to first understand the historical trajectory of such interest—a history that can best be characterized by shifts in evolving understandings of food quality.

What's in a word?

For those at the core of the food world in the late 1980s and early 1990s, organic was one of the primary drivers of food quality perceptions. As we move away from the core, and toward the larger number of consumers occupying the midlevel of the food world, we find that consumers during this era understood quality more as an expression of "natural."

Not surprisingly, as this orientation became common knowledge to food marketers and product managers in the 1990s, we witnessed an attendant explosion of "natural" products.

But if we fast-forward to our current epoch, we find that things have changed quite dramatically. The "organic" distinction, once at the pinnacle of food quality, has now come down a few steps, at least with mainstream consumers. Now, "fresh" and "local" are among the key words replacing "organic" as indicative of the highest-quality food experience.

So what does "fresh" mean? Currently, there's no single dimension in food that triggers "fresh" perceptions in all consumers. Instead there exists a multiplicity of underlying dimensions. Each is capable of triggering this perception on its own,

but they also have a pronounced additive effect. Some of these dimensions include:

- Appearance of minimal processing,
- Cues of naturally sourced ingredients,
- Location in perishables departments and perimeter food categories,
- Use of natural color palettes and natural packaging materials, and
- Product narratives emphasizing people, places, and traditions.

The bottom line here is that almost any food, given the right dimensions feeding shopper perceptions, can be reimagined to tap the current consumer desire for "all things fresh." What determines success won't be the abject freshness of the product but, rather, the marketer's/retailer's ability to persuade shoppers that the product in question is of the highest quality possible.

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Grocery list

28% of Americans are reading labels much more frequently.

60% "always" look for expiration dates.

50% of consumers "always" check nutrition facts.

Source: HartBeat, The Hartman Group's FREE online newsletter

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