KELLOGG
RURAL LEADERSHIP
PROGRAMME

A proposed plan of action for meeting the immediate requirements and future expectations of the New Zealand Honey Industry.

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1. Acknowledgments

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2. Executive Summary

New Zealand relies on bees to pollinate crops and pasture worth at least $5 billion annually to its economy. In 2019/20, honey export value reached $425 million. In July 2020, the Government released its *Fit for a better world* vision. While it did not separate the impact on the New Zealand honey industry individually, the numbers infer the industry is being tasked to add $65 million in export earnings cumulatively over the next 10 years. This task falls to the 935 export registered beekeepers (about 10% of total registered beekeepers) to supply Mānuka and/or non-Mānuka honey for export. So, how well is the industry set up to accomplish this task?

Industry members were asked via survey, what was working and not working in the industry across the six areas below. These areas were selected by applying a human psychology lens to understand the motivation behind the behaviour within the industry. Of the 57 respondents, over half indicated they wanted change across five of the six areas.

1. **Sustainable livelihood:** 54.4% said the industry was not providing them with a sustainable livelihood, primarily because non-Mānuka honey prices have dropped below cost of production. They also voiced concerns about the oversupply of honey, the overstocking of bees, and the low demand for products like beeswax and propolis. Haar et al. (2017) explains income predicts work-life balance and job satisfaction, and concerningly, Stats NZ (2020) found average 2020 weekly wage and salary earnings in the industry was $1,090 per week, $259 per week less than average 2019 weekly expenditure. Respondents who were getting a sustainable livelihood from the industry credited Mānuka's high prices and profitability, and their business acumen.
2. **Industry structure:** 72.2% said having a more united industry would be an advantage. They believe "we are stronger together" and becoming more unified would mean more collaboration and agreed priorities, better influence over Government and regulators, and greater ability to enforce rules and stop the rogues and cowboys. Respondents happy with the industry structure cited having multiple organisations kept the others honest, ensured all voices are heard and allowed for personal autonomy. However, Coulet (2019) warns there should only be one industry body to represent the 'voice' of the industry as Government and regulators find it easier to talk to an industry body vs. every organisation active in the industry, and industry body board members must serve the interest of the whole industry (Boleat, 2001).
3. **Effective communication:** 57.9% said the industry did not communicate effectively with them. They cited lack of an accessible national database, lack of communication, lack of one voice, lack of allowing their input, and lack of belief of information communicated were pressing issues. Laundry (2019) explains ineffective communication means important information can be misinterpreted, causing relationships to suffer, and ultimately create barriers that hinder progress. Respondents happy with the industry communication said it was because they were a member of ApiNZ and/or had built up personal networks which kept them informed.
4. **Good leadership:** 61.4% said the industry leaders were not doing a good job. They cited lack of leadership courage, lack of listening, putting personal agendas first, lack of a unified voice, lack of communication and lack of leader visibility as the reasons. Sinek (2006) advises leadership is not about being in charge but about taking care of those in your charge and Hogan et al. (2005) asserts leadership

should be viewed by the ability to build and maintain a group, and evaluated by the performance of the group over time. Respondents happy with the industry leadership said advocacy at Government level and communication with the industry is done well, they are producing results with limited resources, and they are doing their best.

5. **Clear vision:** 84.2% said the industry did not have a clear vision. They felt no vision existed as the industry is too fragmented to have a united vision. Sinek (2018) explains a vision is the starting point, the basic building block. A vision provides a sense of purpose and direction and when everyone is pulling toward the same goal, people start trusting each other. Mollenhauer (2015) warns without a vision the industry is going nowhere, because members are inspired by seeing a clear vision forward and can align their energies and resources to achieving progress. Respondents happy with the industry vision cited ApiNZ's vision of "a thriving long-term future for New Zealand honey and bee products" and universal visions of 'bee aware' and making good quality honey and caring about the bees.
6. **Self-fulfilment:** 80.7% said their work in the industry fulfilled them. They love the bees, the lifestyle and being outdoors in nature, producing something natural, the sense of achievement from solving problems and supporting others. Respondents who did not feel fulfilled said they were worried about survival of their business and the industry. Concerningly, their feelings of fulfilment are lower than New Zealanders feeling of fulfilment as Stats NZ (Mar 2021 quarter) found 86% of their respondents reported high life satisfaction.

This research shows respondents are calling out for better returns, a unified industry, effective communication, strong leadership, clear vision and greater self-fulfilment. So, is it possible for the industry to create these outcomes? Yes it is, and this report supported by literature recommends a two-phase plan of action to accomplish it:

Phase 1: What does the industry need to change? This is about finding all industry members and capturing their voice for change following a three-step process, which looks like this:

1. Developing a national database.
2. Creating a national communication campaign.
3. Sending out a national survey.

Phase 2: How does the industry change? This is about listening to all industry members responses and guiding them through change by following Kotter's (2012) proven eight-step process of leading change, which looks like this:

1. Creating a sense of urgency.
2. Forming a powerful coalition.
3. Developing the change vision.
4. Communicating the vision.
5. Empowering industry members to act.
6. Creating quick wins.
7. Building on the change.
8. Anchoring the change into industry culture.

Can this two-phase plan of action work? According to Moore's (1991) adaptation of the *Law of Diffusion of Innovations* it can work if 15%-18% of industry members commit to creating change in the industry.

3. Introduction

3.1 Industry worth

The Minister of Primary Industries, Hon. Damien O’Connor says the Apiculture industry is very important to New Zealand because we rely on bees to pollinate crops worth at least $5 billion annually to our economy (O’Connor, 2019). This falls across both agriculture and horticulture and includes pollinating pastoral clover, seed crops, vegetables, berries and stone fruit.

3.2 How many beehives are there?

In 2020 there were 869,056 registered beehives, down 5% from 2019 (the first recorded decline in 15 years). and up 92% from 2013 (MPI, 2020). Note: anecdotally it is said the industry has a seven-year cycle which is why 2013 stats have been included for contrast.

3.3 Who is keeping the bees?

In 2020 there were 9,585 registered beekeeping enterprises, up 3% from 2019, and up 124% from 2013. 87% were hobbyists with 1-50 hives, 9.5% were beekeepers with 51-500 hives and 3.5% were commercial beekeepers with over 501 hives (MPI, 2020).

3.4 What are these beekeepers tasked to do?

The Government's *Fit for a better world* vision is to add $44 billion in primary sector export earnings cumulatively over the next 10 years (MPI, Dec 2020). Of the $44 billion, $500 million is targeted for arable and ‘processed food and other products’ which includes honey (MPI, Jul 2020).

Of the arable and ‘processed food and other products’ industries, the New Zealand honey industry contributes 13% of current export earnings. Calculation of 13%: $425 million (2020 honey exports (MPI, 2020)) / $3,293 million (2020 total arable and ‘processed food and other products’ export revenue (MPI, Dec 2020)).

This infers the Government's *Fit for a better world* vision is tasking the New Zealand honey industry to add $65 million (calculation: 13% of $500 million) in export earnings cumulatively over the next 10 years. This task falls to the 935 export registered beekeepers (approximately 10% of all registered beekeepers identified earlier) to supply Mānuka and/or non-Mānuka honey for export (MPI, Jun 2021).

3.5 Export honey value and volume

For the rest of this report, I applied the 80/20 Principle which states 80% of results come from 20% of causes (Koch, 1997), and focused on honey as it makes up most of the industry’s exports.

In 2019/20, honey export value reached $425 million, up 20% from 2019 (and up 193% from 2013). $290 million (68%) was monofloral Mānuka, $85 million (20%) was multifloral Mānuka, $48 million (11%) was non-Mānuka and $2 million (1%) was comb honey and honey dew (MPI, 2020).

Honey export volume reached 10,288 tonnes, up 28% from 2019 (and up 28% from 2013). 5,245 tonnes (51%) was monofloral Mānuka, 2,609 tonnes (25%) was multifloral Mānuka, 2,113 tonnes (21%) was non- Mānuka and 321 tonnes (3%) was comb honey and honey dew (MPI, 2020).

3.6 Export honey prices

The average export prices in 2019/20 are shown in Table 1.

	2019/20 ($ per kg)
Non-Mānuka	$22.50
Multifloral Mānuka	$32.44
Monofloral Mānuka	$55.36

Table 1: 2019/20 average export prices. Source MPI 2020 Apiculture Monitoring Report

3.7 Prices to beekeepers

In 2019/20, average prices paid to beekeepers for non-Mānuka honeys dropped by 30% to 50%, and prices for monofloral Mānuka trended toward the lower end of the price range (MPI, 2020). Non-Mānuka honeys prices have also fallen significantly from prices averaged over the last six years, and Mānuka was not immune to falling prices at the lower price range (see Table 2).

	Average of last 6 yrs ($ per kg)	**2019/20 ($ per kg)**
Light (clover type)	$7.60 - $11.20	$2.50 - $5.50
Light amber	$6.50 - $10.15	$2.50 - $4.50
Dark, including honeydew	$6.17 - $11.25	$2.50 - $4.00
Mānuka	$9.55 - $122.75	$4.50 - $130.00

Table 2: average of 2014-2019 prices paid to beekeepers vs. 2019/20 prices paid to beekeepers. Source MPI Apiculture Monitoring Reports from June 2014 to June 2020

3.8 Mānuka is the king of honeys

Mānuka especially monofloral Mānuka is the king of honeys, in terms of export prices and prices paid to beekeepers. So, if *Fit for a better world's* vision is tasking the New Zealand Honey Industry to add $65 million, the 80/20 Principle implies most will be coming from Mānuka.

3.9 Factors potentially affecting Mānuka export earnings

1. **Confusion around active Mānuka honey quality standards**. Active Mānuka honey is sold under multiple quality standards like UMF, MGO, MGS and OMA. In 1981 Biochemist Peter Molan took a once worthless honey and made it king by identifying Mānuka honey had significant non-peroxide antimicrobial activity, meaning it kills antibiotic-resistant bacteria commonly found in chronic wounds, bed sores and leg ulcers (Van Eaten, 2004). This characteristic is quantifiable and active Mānuka honey is currently sold under multiple quality standards like UMF, MGO, MGS and OMA which potentially damages Mānuka's morality and confuses consumers.
2. **Mānuka honey failing or passing the Ministry for Primary Industries** (**MPI) authenticity test.** According to Blignaut (2020), Mānuka underwent a massive

change in December 2017 with the new definition for Mānuka honey released by the MPI in response to the growing concerns of fraudulent honey being sold as Mānuka honey and damaging the brand's integrity. The change in definition caused many Northland beekeepers' Mānuka honey to fail the test. According to industry member Peter Bray, the change in definition also meant some Mānuka honey can be blended with as much as 66% clover honey and still pass the test (Phare, 2021).

3. **Honey fraud.** According to Olmsted (2016) honey is the third most faked food in the world behind olive oil and milk. Common practices include mislabelling honey or blending it down using cane sugar, corn syrup or beet sugar. A report issued by the World Congress of Beekeepers showed the economic damage of honey fraud to beekeepers who produce authentic honey is approximately $1 billion, as they are now competing with sellers of low-priced fraudulent honey (Phipps, 2021).
4. **The word Mānuka.** New Zealand does not have exclusive rights to the word Mānuka which could cause revenue and demand to fall due to commodification of Mānuka honey in major markets like the EU, UK, USA and China. The Mānuka Honey Appellation Society Incorporated has been fighting for years to trademark the word Mānuka, arguing it is a Māori name inextricably tied to New Zealand, like the term champagne is to a region in France. According to Rawcliffe (2019) an additional $2.2 billion of value could be created by 2033 if the term and IP of Mānuka honey is protected. Protection validates Mānuka honey by demonstrating it meets the definition of Mānuka, it is from New Zealand, it is unadulterated and it is produced from Leptospermum scoparium only.
5. **Glyphosate testing.** Honey exports to Japan last year totalled almost $68 million, but Japan warns it will stop importing our honey if 5% of honey tested at the border exceeds its glyphosate limit (Dreaver, 2021) of 0.01mg per kilogram, which is one tenth of New Zealand's standard of 0.1mg per kilogram (Rennie, 2021). Will other countries follow suit? And how will beekeepers keep bees away from glyphosate, as bees forage at least 3km from the hive and beekeepers don't have any control over land users in that area (Dreaver, 2021).
6. **COVID-19.** It created an explosion of exports last year as consumers stocked up on health and wellbeing products, but demand has returned to pre COVID-19 levels due to more product being stored in-market (Edmonds, 2021). COVID-19 may also continue to cause: movement and border controls impacting operational efficiency and access to air and sea freight (MPI, 2000), contractions in the Mānuka honey market due to difficulty in supply chains issues (Proudfoot et al. 2020), increases in online demand, particularly for the higher UMF grades, due to the perception that Mānuka honey is good for general wellbeing and the immune system (Gray, 2020), heightened interest among consumers for natural food products (Edmonds, 2021), decreases in the daigou honey trade in New Zealand due to border closures and increases in daigou customers in China buying locally through New Zealand exporters online and store networks due to freight disruptions (Morrison, 2021), rising costs of air freight due to less capacity and frequency which could be passed onto consumers (Harris, 2020), and falling household incomes making consumers less inclined to spend (Jones, 2020).

3.10 The big opportunity

Proudfoot et al. (2020) advises now is the time to connect a food product to a health benefit in a scientifically valid way. So, is additional research on honey health benefits (including non-Mānuka) the key to increasing export earnings, and keeping non-Mānuka producers afloat?

3.11 Who will fund the research?

Who has the money and is willing to pay for the research? As honey prices keep dropping, beekeepers are urgently looking at opportunities to increase revenue and reduce costs. Non-Mānuka honey producers are struggling to cover costs of production. Some Mānuka honey producers returns are sliding lower. And all the while export honey producers are paying to store their honey while they wait for returns to improve!

3.12 Can we sell our honey domestically?

Domestic honey consumption does not mirror export demand (Edmonds, 2021) because an estimated 5,000 tonnes was consumed locally in 2020 (Phare, 2021). Edmonds (2021) warns New Zealand honey consumption per person per year is dropping. In 2018 it was 0.45kg per year whereas in 2015 it was 0.57kg per year.

3.13 Can we sell our honey surplus?

New Zealand is potentially producing almost as much in honey surplus annually as it exports. Phare (2021) says in 2019, 9,640 tonnes of honey was exported leaving a surplus of more than 8,300 tonnes, which added to the New Zealand stockpile of around 35,000 tonnes (Edmonds, 2021).

3.14 Can we use a levy?

On 1 March 2019, commercial beekeepers voted down the ApiNZ Commodity levy. 76% voted no, 24% voted yes, and only 61% of eligible voters voted. The levy proposed to fund issues like research, biosecurity, and industry sustainability. Beekeepers with 26 or more hives who produced over 750 kg of honey per annum were to be levied at $0.10 per kg of harvested honey for the first year, raising approximately $2 million per annum (ApiNZ, 2019).

How about including the 87% hobbyists? It could mean a lower levy but more in the kitty? Some might argue hobbyists are not selling honey so why should they? Others might argue the levy also funds biosecurity which impacts every beekeeper regardless of how many hives they have or if they sell their honey? The industry is vulnerable to biosecurity threats and any outbreak could have catastrophic consequences on the entire industry, not just the beekeepers selling honey. John F Kennedy said “a rising tide lifts all boats”, and in this case, a biosecurity breach impacts all beekeepers. Case in point, AFB and varroa.

3.15 Can we call upon Government?

Interestingly, some 2021 anecdotal comments were: if the industry was half as organised as the bees they’d be great, Government thinks we are a bunch of muppets for not coming together as an industry, and how can we ask Government to help us when we can’t even show them we’re prepared to help ourselves?

The Minister of Primary Industries, Hon. Damien O’Connor said he was committed to protecting the industry’s value and increasing it but there is only one way to do that – and that is for everyone to work together to protect the long-term viability of the sector and get more from what we do now. Commercial beekeepers need to start seeing themselves as an increasingly important contributor to our primary sector. When the primary sectors do well, New Zealand does well (O’Connor, 2019).

In other words, we are all in this together.

4. Aim

The aim of this report is to capture voices of the New Zealand honey industry, to provide an insight into what is working and not working in the industry, and to provide a proposed plan of action for meeting immediate requirements and future expectations of the industry. It is not within the scope of this report or the writer's expertise to find and 'force' solutions onto the industry. Instead, this report aims to discuss the process for the industry to find the solutions (as its members hold the answers) and implement them.

5. Methodology

The methodology used in this report is a mix of casual conversations to capture dialogue themes, semi-structured interviews, thematic analysis to compare the different themes captured in the survey, quantitative analysis of survey responses, and a literature review.

5.1 Dialogue themes

Firstly, casual conversations were undertaken to understand what industry members thought was working and not working in the industry. I spoke with 22 members, sometimes more than once, with conversations varying from 30 mins to over two hours to capture dialogue themes.

5.2 Human psychology lens

Secondly, it became evident from the casual conversations that applying a human psychology lens was the key to understanding the motivation behind the behaviour within the industry. The lens was focused first by applying *Maslow's hierarchy of needs* (see Figure 1) as it states humans are motivated to fulfil their needs hierarchically, beginning with their basic physical needs (of air, water, food, rest and health), before moving up to security needs (of safety, shelter and stability), then social needs (of being loved, belonging and inclusion), then esteem needs (of self-esteem, respect, recognition and power), and finally the ultimate need of self-actualisation (self-fulfilment and reaching full potential). In short, the bottom tiers focus on what humans need to survive and the top tiers focus on what humans need to thrive.

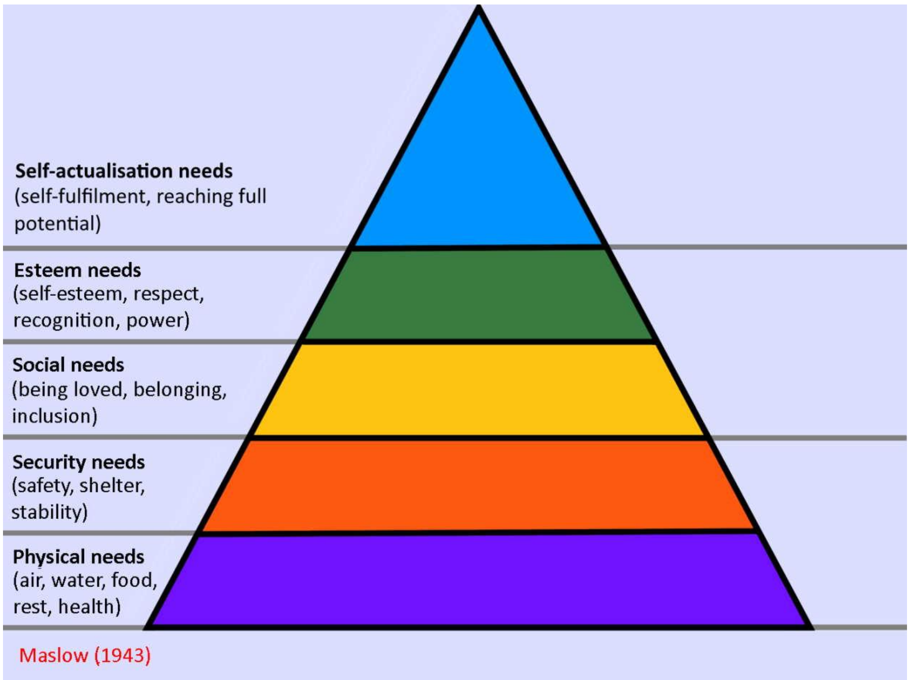

Figure 1. Maslow's hierarchy of needs. Source Abraham Maslow's 'A theory of human motivation'

The lens was focused further by applying *Hogan's socioanalytic theory* (see Figure 2) as it states humans have three goals in life, the first goal is to get ahead, the second goal is to get along and the third goal is to find meaning.

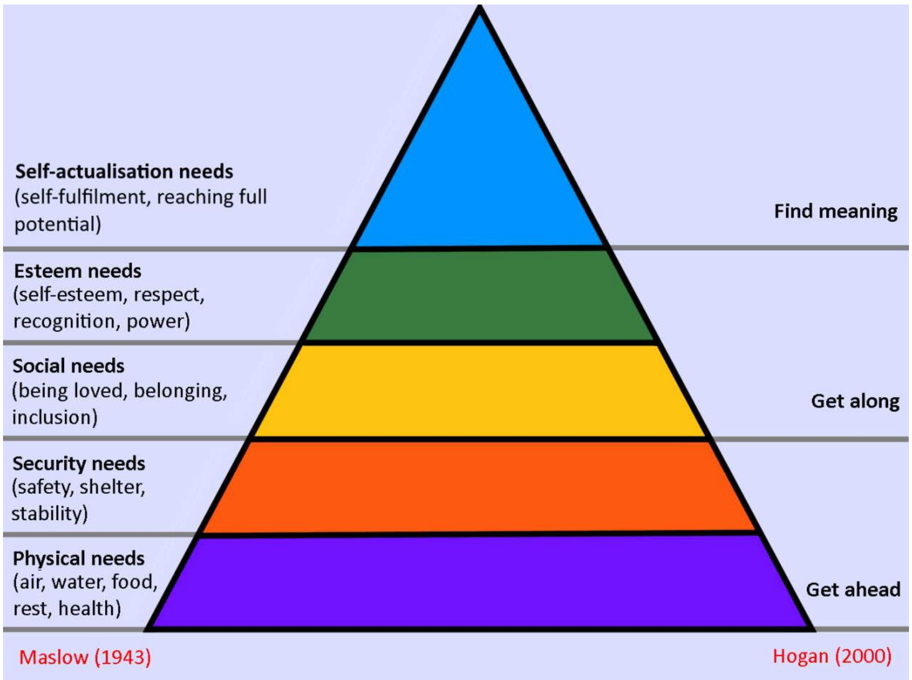

Figure 2. Hogan's socioanalytic theory. Source Robert Hogan et al. 'Personality Theory and The Nature of Human Nature'

The lens was fully focused by overlaying the dialogue themes with Maslow's hierarchical order of human needs and Hogan's hierarchical order of human goals (see Figure 3), which identified these six areas of discussion:

1. Sustainable livelihood
2. Industry structure
3. Effective communication
4. Good leadership
5. Clear vision
6. Self-fulfilment

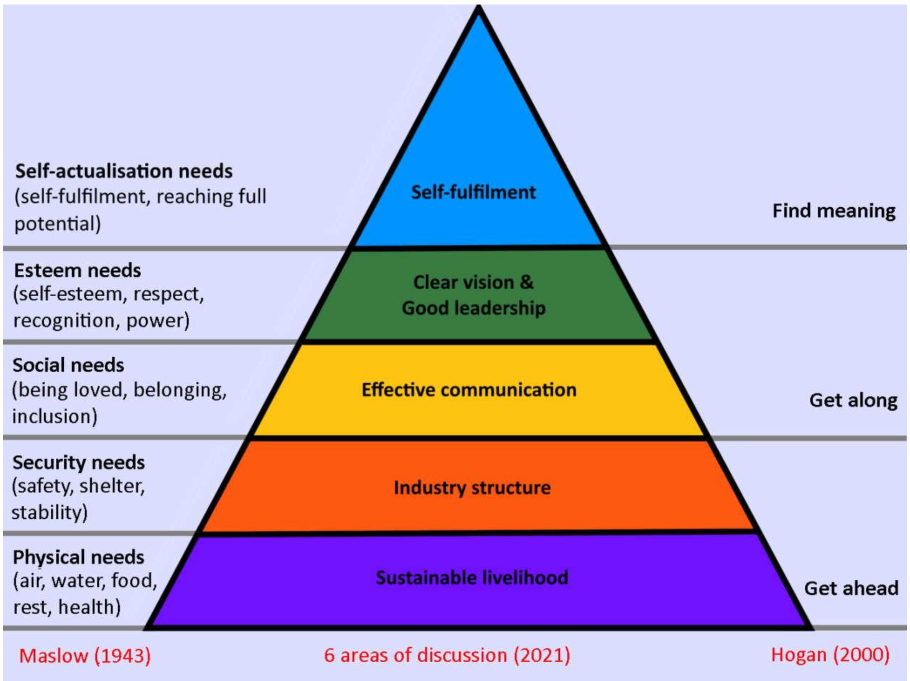

Figure 3. The 6 areas of discussion

The six areas of discussion covered each tier of the human needs/goals hierarchy. In short, they created the key to understanding if the industry was meeting member needs/goals, and the reasons behind member views and behaviour.

5.3 Terminology distinctions

Thirdly, most literature reviewed, and some respondents use terms like 'company', 'organisation' and 'business'. For this report these terms are interchangeable with the term 'industry'. This is because the human psychology aspect, which is the lens applied in this research, remains constant regardless of the term. Think of it like industry is the family, and company, organisation and business are the family members.

5.4 Respondent recruitment

Industry members were approached by phone prior to emailing the survey link if they were known to me or someone in my personal network. If they were not known, the survey link was emailed via ApiNZ's (who offered to email it out) and Franklin Beekeepers database or via NZ Beekeepers+ forum. Recruitment captured a full mix (see Table 3) of years involved in the industry (with 47.4% majority being 20+ years), of roles within the industry (with 47.4% majority producing/supplying honey), of geographic locations (with

24.6% majority being Northland/Auckland/Hauraki Plains) and of product worked with (with 38.6% majority being Honey: Non-Mānuka).

Years in the industry	1 year or less 2-4 years 5-9 years 10-14 years 15-19 years 20+ years* (this was the majority at 47.4%)
Role in the industry	Hobbyist Produce/Supply Honey* (this was the majority at 47.4%) Extract/Process Honey Pack/Process Honey Trade Honey Market Honey Queen Breeder Bee Trader Pollination Beekeeping supplies Industry Body
Geographical location	Northland/Auckland/Hauraki Plains* (this was the majority at 26.4%) Waikato/King Country/Taupo Coromandel/Bay of Plenty/Rotorua/Poverty Bay Hawke's Bay/Wairarapa/Manawatu/Taranaki/Wellington Marlborough/Nelson/West Coast Canterbury/Kaikoura Otago/Southland
Product they work with	Honey: Non-Mānuka* (this was the majority at 38.6%) Honey: Mānuka Honey: Multifloral Bees: Breeding Bees: Propolis, pollen, royal jelly, wax People: Beekeepers, farmers/growers, packing plants

Table 3. Respondent demographics

5.5 Data collection

The data was collected online via a Google form. To allow respondents to speak freely the data was collected anonymously. The survey questions were constructed around the six areas of discussion and linked back into the research question of what is currently working and not working in the industry. The survey captured 57 industry member voices and the survey questions are included in Appendix 1.

5.6 Data analysis

Parts of the data collected was analysed quantitatively using pie charts or qualitatively using thematic analysis to identify the main themes of the six areas of discussion. Then a literature review was undertaken to compare what different sources of information said about the six areas of discussion.

6. Literature Review

This section reviews previous literature across the six areas of discussion, to gain an understanding of existing definitions, observations and research relevant to each area.

6.1 Sustainable Livelihood

6.1.1 Definition

Chambers et al. (1992) defines a livelihood as comprising of people, their capabilities and their means of living, including food, income and assets, while a sustainable livelihood copes with and recovers from stress and shocks and provides for future generations.

6.1.2 Observation

According to Carr et al. (2017) a decent wage is important to job satisfaction and influences mental and physical well-being. Haar et al. (2018) echoes this by finding strong support for income predicting work-life balance and job satisfaction.

6.1.3 Research

Stats NZ (2019) states the average weekly expenditure for New Zealand households was $1,349 and top weekly expenditure included housing, food, transport, recreation and culture, health, clothing and footwear. Average weekly wage and salary earnings in 2020 in the Agriculture, Forestry and Fishing industry was $1,090 per week, which is $259 less than average 2019 weekly expenditure. The industry also earned $119 less per week than the 'all industry groups' average of $1,209 per week (Stats NZ, 2020). Comparing hourly rates, the industry average is $26.78 per hour, $4.68 above the living wage of $22.10 per hour (Living Wage, 2021) and $6.78 above the minimum wage of $20 per hour (MBIE, 2020).

6.2 Industry Structure

6.2.1 Definition

According to Thompson et al. (1995) most industries are populated by hundreds, even thousands, of small and medium-sized companies, many privately held and none with a substantial share of total industry sales. Porter (1980) defines a fragmented industry as one with a large number of small or medium size firms where no firm has a significant market share or strong influence on the industry. He states the main causes of industry fragmentation include low overall entry barriers, the absence of economies of scale, high transportation costs, high inventory costs or erratic sales, no advantages of size when dealing with buyers or suppliers and local regulation.

6.2.2 Observation

Coriolis (2012) observed the New Zealand honey industry was relatively fragmented, citing reasons like lack of industry cohesion, infighting and multiple Mānuka quality standards including UMF, MGO, MGS and OMA, and they suggested industry consolidation as the way forward.

6.2.3 Research

O.C. Tanner Institute (2019) found people want to connect, connections promote a sense of belonging, connections create a feeling of making a difference, and employees who feel a sense of belonging within their company are 5.3 times more likely to feel empowered to perform their best work. Their 2020 study revealed when employees feel connected to their teams, there is a 55% increase in engagement and an 83% increase in the incidence of great work. The study also identified two traits of thriving teams: first, a strong sense of autonomy because when people work together with strong bonds, there is 42% greater odds they feel they have high autonomy, and second, a strong sense of psychological safety because when people feel emotionally safe, they take risks, innovate and share ideas without fear of negative consequences (O.C. Tanner Institute, 2020). In addition, Smithson et al. (2009) found a collective voice can emerge as a result of collaborative arguing (defined as reasoning together rather than against one another), and Brennan et al. (2015) found team performance exceeded the efficiency of two individuals working independently, proving two heads are better than one. Finally, Estlund (2003) explored how workplace bonds strengthen a diverse democracy. She argues when working together, co-workers learn about each other's lives and develop feelings of affection, empathy, sympathy and loyalty for each other. They also experience friction and conflict but with everything at stake, they often find ways to work through or around conflicts and to get the job done in spite of personal differences. So, who consolidates this diverse democracy? Coulet (2019) says it's the role of the industry body to consolidate the industry viewpoint, acting as the main point of contact and speaking on behalf of their members to Government and regulators, who find it easier talking to an industry body rather than every group active in the industry. So, who makes up the industry body? Boleat (2001) states the industry body board should be representative of the industry membership. This means board members often represent companies that compete, so they have a schizophrenic role in that they are responsible for governing the industry while at the same time representing the interests of their companies. But he warns board members must serve the interests of the whole industry, not just their own.

6.3 Effective Communication

6.3.1 Definition

Covey (1989) defines effective communication as doing all four types of communication well (reading, writing, speaking and listening). He credits communication as being the most important skill in life and believes the key to effective communication is first seek to understand, then to be understood. Sinek (2009) agrees by saying communicating is not about speaking, it is about listening. He adds communication is not about speaking what we think, it is about ensuring others hear what we mean (Sinek, 2019).

6.3.2 Observation

Sinek (2009) states people are drawn to leaders who are good at communicating, and Landry (2019) believes effective communication is vital to gain trust, align efforts in the pursuit of goals, and inspire positive change. She found when communication is lacking, important information can be misinterpreted, causing relationships to suffer and, ultimately, creating barriers that hinder progress.

6.3.3 Research

Baldoni (2010) found companies that communicate effectively had a 47% higher return to shareholders over a five-year period, and effective internal communications keeps employees engaged in the business. Furthermore, Patterson et al. (2011) found what made people great communicators was their ability to stay focused on the purpose of the communication and listen to the other person's opinions. Curtin (2019) found when an employee felt heard, they are 4.6 times more likely to feel empowered to perform to the best of their abilities. Finally, Plumberg (2018) found miscommunication had a tremendous impact on the workplace. His study showed 44% said miscommunication caused a delay or failure to complete projects, 31% said it caused low morale, 25% said it caused missed performance goals and 18% said it caused lost sales.

6.4 Good Leadership

6.4.1 Definition

According to Sinek (2014) good leaders always work for the people and put their own interests aside to protect the people and to pull them into the future. He believes leadership is not about being in charge, it is about taking care of those in your charge (Sinek, 2016). He also believes the goal of leadership is to set a culture (which he defines as values + behaviour) free of danger from each other. The way to do that he explains is by giving people a sense of belonging, by offering them a strong culture based on a clear set of human values and beliefs, by giving them the power to make decisions, by offering trust and empathy, and by creating a ‘Circle of Safety’ around them to reduce the threats they feel inside the group. He says the more we trust that the people to the left and to the right of us have our backs, the better equipped we are to face the constant threats from the outside together, pull together as a unified team, and be better able to survive and thrive regardless of the conditions outside. He concludes every member of the group plays a role in maintaining the Circle of Safety, and it is the role of leaders to ensure that they do, because without a ‘Circle of Safety’ people are forced to spend too much time and energy protecting themselves from each other (Sinek, 2014).

6.4.2 Observation

In support, Hogan et al. (2005) believes leadership should be viewed by the ability to build and maintain a group and evaluated by the performance of the group over time. He believes bad leadership almost always creates disengaged members, individual chicanery, and eventually industry failure. People who rise to the tops of large organisations he believes are distinguished by hard work, brains, ambition, political skill, and luck, but not necessarily by talent for leadership. According to Collin (2001) the thing that sets top leaders apart is they understand the importance of putting people first and strategy second. Giles (2021) echoes this by saying leaders’ number one job is providing safety for others and then creating connection. She found when people feel safe and connected, they can unleash their innate genius for radical innovation, permanent change and transformational learning. She also found the five most important leadership competencies are centred around soft skills and emotional intelligence (Giles, 2016). In addition, Kouzes et al. (2002) found exemplary leadership always 1) models the way, 2) inspires a vision, 3) challenges the process, 4) enables others to act, and 5) encourages the heart. Furthermore, Kotter (2001) reflects what leaders really do is prepare organisations for change and help them cope as they struggle through it. He believes most organisations are over-managed and under-led because leadership is about behaviour, vision, people buying in, taking an organisation into the future, and producing useful change (Kotter, 2013). Finally, Lorigan (2021) agrees by saying it is leadership, not management, that has the most profound influence on organisational success.

6.4.3 Research

Studies prove that under competent leadership, people and companies prosper. Joyce et al. (2003) found CEOs account for about 14% of the variance in firm performance, and Barrick et al. (1991) found high performers add an additional $25 million in value to an organisation during their tenure. O.C. Tanner Institute (2020) discovered great leaders connect employees to three things: purpose, accomplishment, and one another. They found when leaders connect their people to purpose, employees are 373% more likely to have a strong sense of purpose, 747% more likely to be highly engaged, and 49% less likely to burn out. They also found when leaders connect their people to accomplishment, there is a 259% increase in odds an employee will have a strong sense of opportunity, 247% increase in odds an employee will do great work, and they will be 46% less likely to burn out. Finally, they found when leaders connect their people to one another, there is a 156% increase in odds that an employee will have a strong sense of wellbeing, a 374% increase in odds that an employee will feel appreciated, and the employee will be 47% less likely to burn out.

6.5 Clear Vision

6.5.1 Definition

Ireland et. al. (2009) defines vision as a big picture about desired future status of the organisation. If the vision is simple, then people can directly identify what they have to do in the organisation to achieve its goals and objectives. In agreement, Sinek (2018) says a vision is the starting point, the basic building block. It feeds people's soul and makes them feel like their life has value and their work has meaning. When there is a vision, everyone is pulling toward the same goal and they start trusting each other.

6.5.2 Observation

According to Sinek (2017) a vision paints a clear picture of what the world could look like if everything goes perfectly. It is an ideal and it is to inspire people to act. He observes there are two ways to influence human behaviour, you can either manipulate it or inspire it (Sinek, 2016) so a vision inspires us and gives us a reason to go to work (Sinek, 2014). Vision he believes is about a cause so just people would willingly sacrifice their time, money or bandwidth to help advance this cause (Sinek, 2020), and with a vision people know what they stand against and stand for (Sinek, 2009). In addition, Mollenhauer (2015) stresses without a vision your company is going nowhere because employees are inspired by seeing a clear direction forward and can align their energies and resources to achieving progress. Wictor et al. (2011) adds the vision is like an umbrella and affects many important parts of the company such as communication and culture. Finally, Thompson et al. (2010) found that five steps must be followed when implementing corporate vision namely, 1) developing a strategic vision, 2) setting objectives, 3) crafting a strategy to achieve the objectives and vision, 4) implementing and executing the strategy, and 5) monitoring developments, evaluating performance and making corrective adjustments.

6.5.3 Research

Carton et al. (2018) studies found the more concrete a vision statement is, the more effectively it can inspire employees. In addition, Sherman (2017) researched LEGO, Starbucks and Apple and found they were examples of companies who achieved success, then foundered after straying from their core purpose, then were rescued by a CEO who recommitted the company to its vision. He explains LEGO weakened its core value proposition by adding excessive product line complexity and pursuing brand-diluting diversifications including children's wear, watches and theme parks (in response to the video game and Internet eras). CEO Jørgen Knudstorp entered and restored LEGO's core values by thinking "what's the really compelling reason why we exist as a company?" Starbucks CEO Howard Schultz returned to the troubled company in 2008 after an eight-year absence and doubled down on Starbucks' brand promise "to inspire and nurture the human spirit - one person, one cup and one neighbourhood at a time." Apple was in deep financial trouble and the first thing Steve Jobs did when he returned as CEO in 1997 was to refocus the company on its founding mission and pronounce Apple's intent to "do a few things extraordinarily well, rather than doing lots of mediocre things".

6.6 Self-Fulfilment

6.6.1 Definition

Gewirth (2009) defines self-fulfilment as carrying to fruition one's deepest desires or one's worthiest capacities, and Kerr (2009) reasons self-fulfilment is the attainment of a satisfying and worthwhile life well lived.

6.6.2 Observation

According to Baumeister et al. (2002) human beings are hardwired to seek meaning. Aftab et al. (2014) found those who had meaning in life were happier and healthier than those who were still looking for it, while Sparks (2018) found self-awareness was critical for reaching our highest personal effectiveness and potential.

6.6.3 Research

A 2021 New Zealand survey found 42.6% of respondents reported low job satisfaction, which mirrored their 2020 and 2019 survey results (New Zealand Council of Trade Unions, 2021). In contrast, a 2021 New Zealand wellbeing survey showed 86% of respondents reported high life satisfaction (Stats NZ, Mar 2021 quarter), which was the same as the Dec 2020 quarter (Stats NZ, Dec 2020 quarter). Similarly, a 2018 New Zealand working life survey showed that 88% of respondents in paid employment were either satisfied or very satisfied with their main job (Stats NZ, Dec 2018 quarter). Interestingly, in stark contrast only 13.9% of Americans are passionate about their jobs (Deloitte Insights, 2020) and 85% of American's are not engaged in the workplace (Zenefits, 2019).

6.7 Change Management

This subsection is included to provide existing literature relevant to change management, if the New Zealand honey industry indicates that change is required.

6.7.1 Definition

Moran et al. (2000) defines change management as the process of continually renewing an organisation's direction, structure, and capabilities to serve the ever-changing needs of external and internal customers.

6.7.2 Observation

Kotter (2012) found eight-steps must be followed for leading organisational change successfully namely, 1) create a sense of urgency, 2) form a powerful coalition, 3) develop the change vision, 4) communicate the vision, 5) empower people to act, 6) create quick wins, 7) build on the change, and 8) anchor the change into the culture. In addition, Rogers (1962) *Law of Diffusion of Innovations* states all populations, always, conform to a normal distribution. It works on the bell curve principle and asserts you can split people in any population into five groups based on what mindset they have (see Figure 4). Finally, an adaptation of the *Law of Diffusion of Innovations* identifies 'the chasm' which states you need to achieve 15%-18% market penetration to create change (Moore, 1991). This is the tipping point and once the idea of change reaches the tipping point, its viral effect becomes unstoppable (Gladwell, 2000).

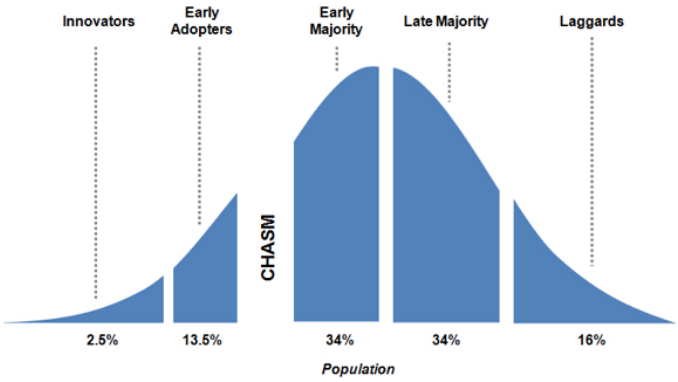

Figure 4. Law of Diffusion of Innovations. Source Geoffrey Moore's 'Crossing the Chasm'

6.7.3 Research

Murphy (2016) found 38% of survey participants like to leave their comfort zone, while the other 62% either do not like to leave their comfort zone or do so only occasionally. Additionally, Deloitte (2013) found 94% of survey participants agree that change can and should be managed, 88% believe that the level of involvement in change implementation directly depends on the level of leadership commitment to support it, 71% consider personal interactions to be the most important communication channel for change, 74% believe that the impact of change is assessed and controlled by leadership, and 78% feel that the intensity of change resistance depends on the culture.

7. Findings and Discussion

Survey respondents answered questions about six areas of the industry as outlined in Figure 5.

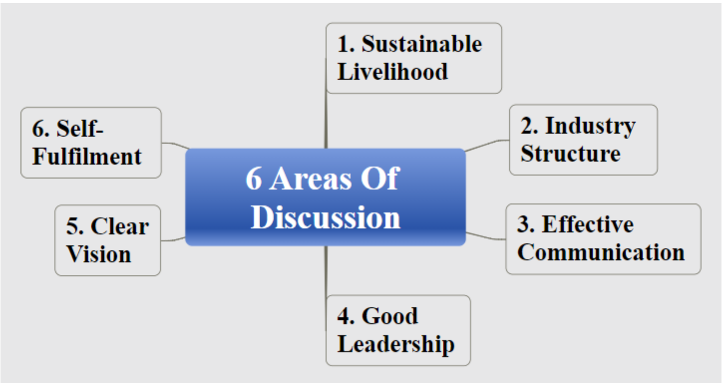

Figure 5. The survey's six areas of discussion

Commentary against each of the six areas is detailed in sections 7.1 to 7.6.

7.1 Sustainable Livelihood

When considering the area of 'sustainable livelihood' 54.4% of survey respondents said the industry did not provide them with a sustainable livelihood (see Figure 6).

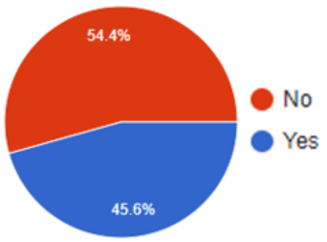

Figure 6. Survey response to the question "Do you think the New Zealand Honey Industry provides you with a sustainable livelihood?

Respondents cited decreased prices, increased costs, and the Mānuka bubble as key themes (see Figure 7).

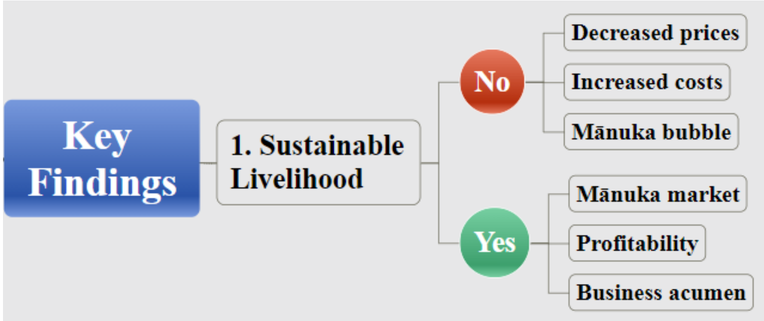

Figure 7. Themes identified by respondents with respect to the presence or lack of a sustainable livelihood from the industry

7.1.1 Decreased prices

Key points respondents made around decreased prices were *"the price of non-Mānuka honey is too low and dropped below the cost of production, producers have gone out of business due to not producing Mānuka honey, there's an oversupply of honey, overstocking of bees is causing low production, propolis is being imported and has little value, and beeswax is no longer in demand"*.

7.1.2 Increased costs

Key points respondents made around increased costs were *"costs are greater than income, levies are increasing and the cost of compliance is increasing with more product testing for residues like glyphosate and tutin"*.

7.1.3 Mānuka bubble

One respondent said *"the Mānuka bubble has destroyed the sustainable livelihood"*.

Conversely, 45.6% of survey respondents said the industry did provide them with a sustainable livelihood (see Figure 6) and cited the Mānuka market, profitability and their business acumen as key themes (see Figure 7).

7.1.4 Mānuka market

Key points respondents made around the Mānuka market were about *"the high pricing of Mānuka"*.

7.1.5 Profitability

Key points respondents made around profitability were *"provides me with a comfortable living for over 40 years, and earning 6 or 7 figure incomes"*.

7.1.6 Business acumen

Key points respondents made around business acumen were *"building up a capital base and the skills needed, having an appropriate and sensible business model, and hard work and attention to detail"*.

7.1.7 Discussion

Literature supports the 'sustainable livelihood' findings by explaining income predicts work-life balance and job satisfaction. But concerningly, literature found average 2020 weekly wage and salary earnings in the industry was $1,090 per week, $259 per week less than average 2019 weekly expenditure.

7.2 Industry Structure

When considering the area of 'industry structure' 72.2% of survey respondents said a more united industry would be an advantage (see Figure 8).

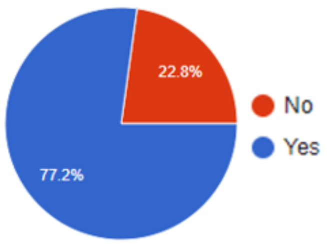

Figure 8. Survey response to the question "Do you think there would be an advantage in having a less fragmented New Zealand Honey Industry?

Respondents who said yes cited 'we're stronger together', influencing Government and regulators, and enforcing rules as key themes (see Figure 9).

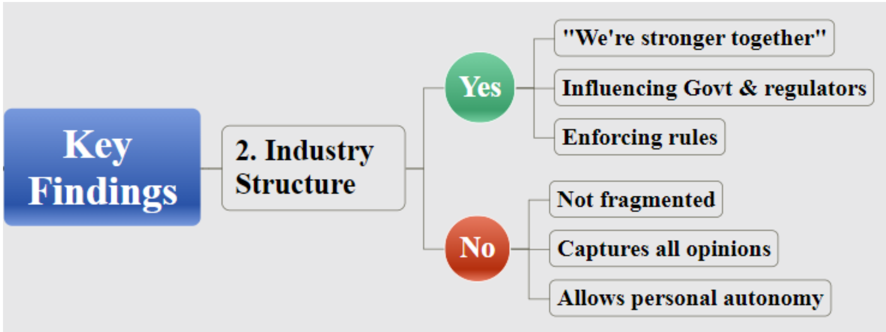

Figure 9. Themes identified by respondents with respect to the presence or lack of fragmentation within the industry

7.2.1 "We're stronger together"

Key points respondents made around 'we're stronger together' were *"current fragmentation inhibits growth, research and stability of the industry, we need to shift to unification as the potential of the industry will never be met with the current* *fragmental model, we're a rudderless ship and with less fragmentation we could steer ourselves, we need to carry the weight of all our producers to be globally competitive, we need a united front to present New Zealand honey when we sell it overseas, we need to achieve better outcomes at all levels of the industry especially pricing, Government assistance, research and development, we need one representative body that is recognised so we can work together and speak with one unified voice, we need more collaboration and agreed priorities leading to a greater willingness to self-fund the industry, and working together creates more opportunities".*

7.2.2 Influencing Government and regulators

Key points respondents made around influencing Government and regulators were *"we'd offer a united message to Government, we'd be more effective at lobbying to the benefit of the industry, we'd offer a sustainable voice, we'd engage with Government and MPI better with a fully represented one voice, and it'd give us trading power and cohesion in terms of sway with Government".*

7.2.3 Enforcing rules

Key points respondents made around enforcing rules were *"we need a controlling body with the power to enforce realistic and fair parameters around issues like our export reputation with low grade honey marketed as Mānuka, too many cowboys especially with the Mānuka honey rush, who have no compunction in riding roughshod over long-term beekeepers, bee colony numbers, dishonest and disreputable competition over hive sites, price fixing, profiteering, rogue beekeepers not doing varroa, AFB and treating bees poorly, individual vendettas, disloyalty, backstabbers, and everyone fending for themselves".*

Conversely, 22.8% of survey respondents said a more united industry would not be an advantage (see Figure 8) and cited the industry was not fragmented, it captures all opinions and allows personal autonomy as key themes (see Figure 9).

7.2.4 Not fragmented

Key points respondents made around not being fragmented were *"the industry is competitive not fragmented and having more than one organisation keeps the other honest".*

7.2.5 Captures all opinions

Key points respondents made around captures all opinions were "*it ensures all opinions are heard".*

7.2.6 Allows personal autonomy

Key points respondents made around personal autonomy were *"it allows for autonomy of your own business".*

7.2.7 Discussion

Most literature supports the 'industry structure' findings by saying the industry is relatively fragmented citing reasons like lack of industry cohesion, infighting and multiple Mānuka quality standards including UMF, MGO, MGS and OMA. It says the most common approach to overcoming industry fragmentation is by consolidation and it is the role of the industry body to consolidate the industry viewpoint. But literature does not support the findings of wanting more than one organisation in the industry. It believes an industry has only one industry body acting as the main point of contact and speaking on behalf of their members to Government and regulators, who find it easier talking to an industry body rather than every group active in the industry. It also states industry body board members must serve the interests of the whole industry, not just their own.

7.3 Effective Communication

When considering the area of 'effective communication' 57.9% of survey respondents said the industry does not communicate effectively with them (see Figure 10).

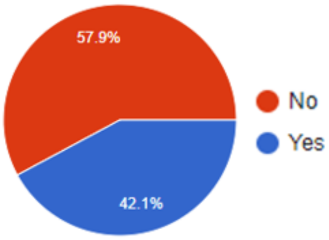

Figure 10. Survey response to the question "Do you think the New Zealand Honey Industry communicates effectively with you?

Respondents cited lack of a national database, lack of communication, lack of one voice, lack of input and lack of belief as key themes (see Figure 11).

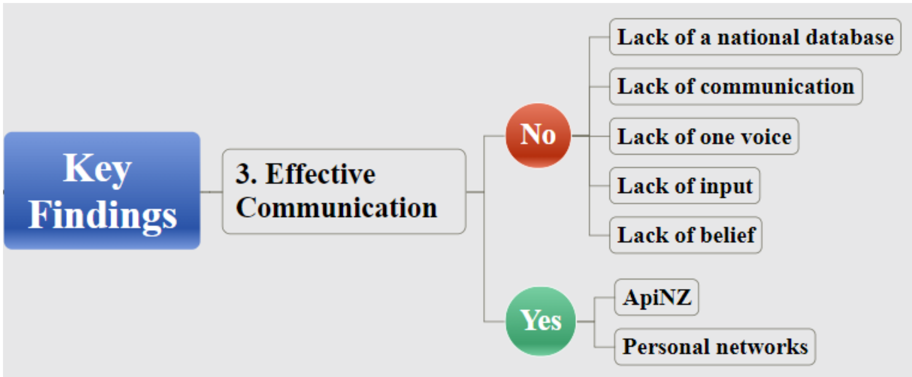

Figure 11. Themes identified by respondents with respect to the presence or lack of effective communication within the industry

7.3.1 Lack of an accessible national database

Key points respondents made around lack of an accessible national database were all around *"the inability to communicate to everyone via a national database"*.

7.3.2 Lack of communication

Key points respondents made around lack of communication were *"if you're not a member of ApiNZ there's practically no communication, there's no communication until someone wants money, the only communication is via a twice-yearly magazine funded mostly through advertising, not much communication apart from the AFB agency, having to find everything out myself, and only hearing about industry happenings through other beekeepers"*.

7.3.3 Lack of one voice

Key points respondents made around lack of one voice were *"there's no body speaking for all beekeepers that's endorsed and resourced by the industry"*.

7.3.4 Lack of input

Key points respondents made around lack of input were *"getting advised of changes with no chance of input, having no say, and advice being totally ignored"*.

7.3.5 Lack of belief

Key points respondents made around lack of belief were *"confusion about facts, unsure who to believe and having little confidence in regulatory aptitude"*.

Conversely, 42.1% of survey respondents said the industry did communicate effectively with them (see Figure 10) and cited ApiNZ and personal networks as key themes (see Figure 11).

7.3.6 ApiNZ

Key points respondents made around ApiNZ were *"offers excellent communications with weekly emails, special updates, website, annual conference, Beekeeper Journal and emailing members if required"*.

7.3.7 Personal networks

Key points respondents made around personal networks were *"staying informed by seeking information out, developing contacts and information sources, using social media, joining groups and online forums"*.

7.3.8 Discussion

Literature supports the 'effective communication' findings by explaining effective communication is vital to gain trust, align efforts in the pursuit of goals, and inspire positive change while miscommunication causes delays or failure to complete projects, low morale, missed goals and lost sales.

7.4 Good Leadership

When considering the area of 'good leadership' 61.4% of survey respondents said industry leaders were not doing a good job (see Figure 12).

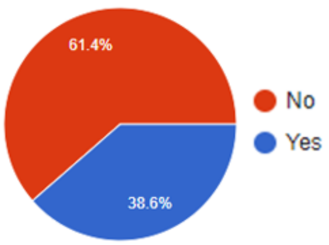

Figure 12. Survey response to the question "Do you think the leaders of the New Zealand Honey Industry are doing a good job generally"?

Respondents cited lack of courage, lack of listening, putting personal agendas first, lack of unified voice, lack of clear communication, and lack of leader visibility as key themes (see Figure 13).

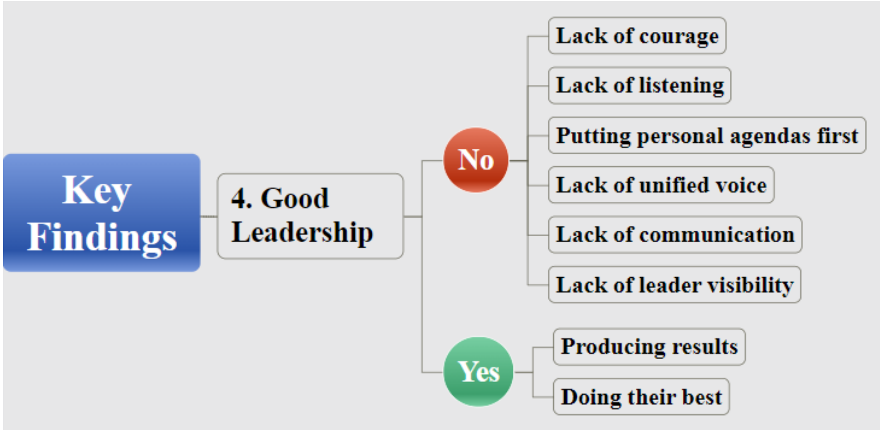

Figure 13. Themes identified by respondents with respect to the presence or lack of leadership within the industry

7.4.1 Lack of courage

Key points respondents made around lack of courage were *"they're weak in their opposition to Government about MPI's Mānuka honey definition, they're in the habit of fence sitting, they're not holding MPI to task, they accept what happens and don't make any changes to better New Zealand beekeepers, they're subject to Government and large beekeeping companies, they get hamstrung by vested interests and noisy non-compliers, they've a poor appreciation of the present state of the industry, they need some training in true leadership skills and life skills on how to be brave and be agents for change, they need to bring 50% of the industry together and the rest would need to tow the line, and they've a reluctance to force a change for the better"*.

7.4.2 Lack of listening

Key points respondents made around lack of listening were *"they don't listen, they don't communicate enough with beekeepers to find out what beekeepers need, and if they want to understand they need to go and talk to the people"*.

7.4.3 Putting personal agendas first

Key points respondents made around putting personal agendas first were *"they look more like individuals with their own personal agenda, they're making decisions that benefit their own specific agenda not the whole industry, and they focus too much on feathering their own nest"*.

7.4.4 Lack of unified voice

Key points respondents made around lack of unified voice were *"we need one united voice from a compulsory singular organisation, they don't represent more than 10% of commercial beekeepers, partly because they only have about that as members, our leadership can't be effective when there are several industry organisations, and there is too much conflicts of interest"*.

7.4.5 Lack of communication

Key points respondents made around lack of communication were *"we need more communication, information especially market data isn't circulated, the power distance is too long and leaders aren't communicating with the majority, the division between the various factions all pushing their own agendas means few are getting adequate* *information, and the conduit on the honey council with MPI don't share or report anymore".*

7.4.6 Lack of leader visibility

Key points survey respondents made around lack of leader visibility were *"they need to be more prominent, who are they, where do we see them and how do we know who they are"?*

Conversely, 38.6% of survey respondents said industry leaders were doing a good job (see Figure 12) and cited producing results and doing their best as key themes (see Figure 13).

7.4.7 Producing results

Key points survey respondents made around producing results were "*advocacy at Government level and communication with the industry are done extremely well. Increase funding to provide more resource".*

7.4.8 Doing their best

Key points survey respondents made around doing their best were "*they're doing what they can with limited resources they have, and give them the resources to be a serious industry body".*

7.4.9 Discussion

Literature supports the 'good leadership' findings by explaining leadership puts people first, strategy second and sets the environment for the culture (defined as values + behaviour). Leadership should be viewed by the ability to build and maintain a group and evaluated by the performance of the group over time, and bad leadership creates disengaged members, individual chicanery, and eventually industry failure.

7.5 Clear Vision

When considering the area of 'clear vision' 84.2% of survey respondents said the industry did not have a clear vision (see Figure 14).

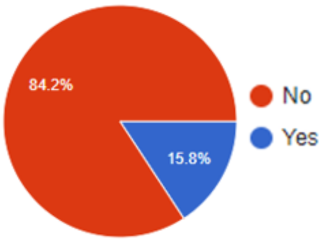

Figure 14. Survey response to the question "Do you think the New Zealand Honey Industry has a clear vision of the future which inspires and unites the industry?"

Respondents cited lack of a vision as the overwhelming key theme (see Figure 15).

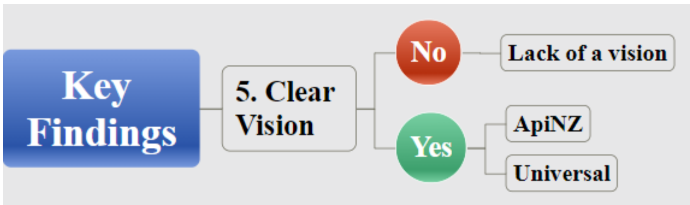

Figure 15. Themes identified by respondents with respect to the presence or lack of a vision within the industry

7.5.1 Lack of a vision

Key points respondents made around lack of a vision were *"the industry is too fragmented to have a united vision, no vision exists, there's no clear vision, it's impossible to have a clear vision if only 13% of the players are affiliated, and no united industry means no unity of purpose means no vision"*.

Conversely, 15.8% of survey respondents said the industry did have a vision (see Figure 14) and cited ApiNZ and universal visions as key themes (see Figure 15).

7.5.2 ApiNZ

Key points respondents made around ApiNZ were *"ApiNZ's vision is clear [a thriving long-term future for New Zealand honey and bee products] and presented at every opportunity"*.

7.5.3 Universal

Key points respondents made around universal visions were *"there is only a vision of 'bee aware', and the vision always includes making good quality honey and caring about the bees"*.

7.5.4 Discussion

Literature supports the 'clear vision' findings by explaining a vision is the starting point, the basic building block. The more concrete a vision is the more effective it is to inspire members. Having a vision makes people feel their life has value and their work has meaning. It provides a sense of purpose, direction and trust when everyone are pulling toward the same goal. Not having a vision means the industry is going nowhere as members are inspired by seeing a clear direction forward and can align their energies and resources to achieving progress.

7.6 Self-Fulfilment

When considering the area of 'self-fulfilment' 80.7% of survey respondents said their work in the industry fulfilled them (see Figure 16).

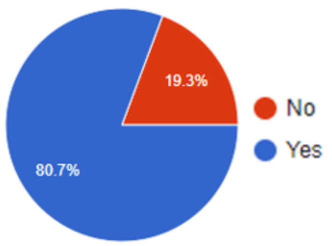

Figure 16. Survey response to the question "Does your work within the New Zealand Honey Industry fulfil you and give you a sense of purpose?"

Respondents cited bees, lifestyle, outdoors in nature, producing something natural, sense of achievement and supporting others as key themes (see Figure 17).

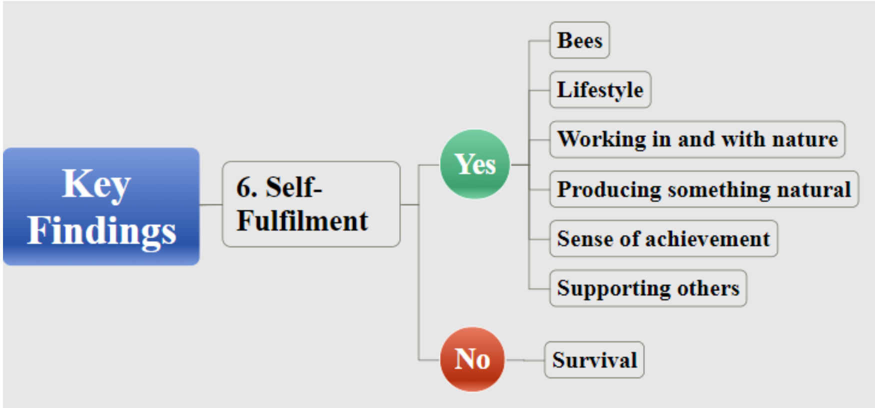

Figure 17. Themes identified by respondents with respect to the presence or lack of self-fulfilment working in the industry

7.6.1 Bees

Key points respondents made around bees were *"a love of beekeeping, a passion for bees, an enjoyment for harvesting honey, feeling fulfilled from working with fabulously clever animals, seeing fruit produced from pollination and seeing healthy happy hives"*.

7.6.2 Lifestyle

Key points respondents made around lifestyle were *"a love for the way of life, the lifestyle, of being self-employed and the varied nature of beekeeping with no two days the same"*.

7.6.3 Working in and with nature

Key points respondents made around working in and with nature were *"the enjoyment from working outdoors, working with nature, being on the land, working in a wonderful environment and doing work that represents the life of the planet"*.

7.6.4 Producing something natural

Key points respondents made around producing something natural were *"liking the low environment impact, enjoying producing natural and healthy products, and feeling great from supplying a beneficial and useful product and service to the whole world"*.

7.6.5 Sense of achievement

Key points respondents made around a sense of achievement were *"feelings of fulfilment from overcoming challenges and solving problems"*.

7.6.6 Supporting others

Key points survey respondents made around a supporting others were *"feelings of fulfilment from helping beekeepers not be overburdened by bureaucracy and delivering value to its members"*.

Conversely, 19.3% of survey respondents said their work in the industry did not fulfil them (see Figure 16) and cited survival as the overwhelming key point (see Figure 17).

7.6.7 Survival

Key points survey respondents made around survival were "*I'm working my ass off and still unsure if I'll go bankrupt even though I'm getting good production, I'm concerned* *about the survival of the industry and our company, every year costs go up, income goes down, crops get smaller and compliance gets tougher".*

7.6.8 Discussion

Most literature supports the 'self-fulfilment' findings by explaining those who had meaning in life are happier and healthier than those who were still looking for it. But, concerningly, literature found that 86% of New Zealanders reported high life satisfaction which is higher than the 80.7% of industry respondents who felt fulfilled in the industry. Curiously, Maslow's Hierarchy of Needs showed an anomaly with the 'self-fulfilment' findings as it suggests people are motivated to fulfil their lower tier needs before progressing to their highest tier need of self-fulfilment, yet respondents felt fulfilled despite feeling their lower tier needs (like livelihood, industry stability, feelings of belonging and inclusion) were being unmet by the industry.

7.7 Main Findings and Discussion Points

Respondents are calling out for better returns, a unified industry, effective communication, strong leadership, clear vision and greater self-fulfilment.

Planned change management is crucial to ensuring change can be made and effectively implemented in the industry.

8. Conclusions

The New Zealand honey industry needs to change. Of the 57 industry members surveyed about what is working and not working in the industry, over half indicated they wanted change across five of these six areas.

1. **Sustainable livelihood:** 54.4% want industry change to provide them with a sustainable living comparable with other New Zealanders.
2. **Industry structure:** 77.2% want industry change to better serve them by uniting them and giving them one voice to influence regulators and enforce rules.
3. **Effective communication:** 57.9% want industry change to help them be informed, gain trust and feel engaged in the industry.
4. **Good leadership:** 61.4% want industry change to set a culture, protect its people and pull them into the future.
5. **Clear vision:** 84.2% want industry change to provide a sense of purpose and direction for the industry, help define short and long-term goals, and guide decisions along the way.
6. **Self-fulfilment:** 19.3% want industry change to satisfy their feelings of fulfilment equal with other New Zealanders.

This research shows respondents are calling out for better returns, a unified industry, effective communication, strong leadership, clear vision and greater self-fulfilment. So, is it possible for the industry to create these outcomes?

9. Recommendations

Yes, it is possible for the industry to create these outcomes, and this report supported by literature recommends a two-phase plan of action to accomplish it:

Phase 1: What does the industry need to change? This is about finding all industry members and capturing their voice for change following a three-step process, which looks like this:

Step 1: Develop a national database (as no accessible one exists). Find all industry members, using every existing network possible, to enable contact with them.

Step 2: Create a national multi-touchpoint communication campaign. Communicate the purpose of the national database to all industry members, using every medium possible, to inspire them to join.

Step 3: Send out a national 'state of the industry' survey. Capture industry members' voices about how the industry can better serve them, using a survey sent via a national database.

Phase 2: How does the industry change? This is about listening to all industry members and guiding them through change by following Kotter's (2012) proven eight-step process of leading change, which looks like this:

Step 1: Create a sense of urgency. Examine industry crises, potential crises and major opportunities identified in survey responses and reiterate back to industry members that change is needed now.

Step 2: Form a powerful coalition. Develop a team of leaders that represent the entire industry who have the expertise and influence necessary to bring credibility to the change (in terms of titles, information and expertise, reputations, and relationships).

Step 3: Develop the change vision. Create a vision to direct the change effort, that inspires the action of industry members.

Step 4: Communicate the vision. Communicate the new vision constantly to industry members, in a way that is easy to understand, using every way possible, including a national database.

Step 5: Empower industry members to act. Remove obstacles like industry structure, skillsets, individual resistance to change, and encourage industry members to conceive innovative ideas and actions to fit the new vision.

Step 6: Create quick wins. Plan and create quick wins, then visibly recognise and reward industry members who made the wins possible, to build momentum and overcome resistance.

Step 7: Build on the change. Continue to move the change forward by keeping the urgency high, empowering industry members and maintaining focus on the vision.

Step 8: Anchor the change into industry culture. New members see the change as part of the culture, existing members see it as a benefit over the old way, and leadership succession keeps the culture alive.

Can this two-phase plan of action work? According to Moore's (1991) adaptation of the *Law of Diffusion of Innovations* it can work if 15%-18% of industry members commit to creating change in the industry.

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11. Appendices

The 2021 New Zealand Honey Industry Survey questions

Q1: Within the New Zealand Honey Industry, how many years have you been involved?

- ☐ 1 year or less
- ☐ 2-4 years
- ☐ 5-9 years
- ☐ 10-14 years
- ☐ 15-19 years
- ☐ 20+ years

Q2: Within the New Zealand Honey Industry, what do you primarily do?

- ☐ Produce/Supply Honey
- ☐ Extract/Process Honey
- ☐ Pack/Process Honey
- ☐ Trade Honey
- ☐ Market Honey
- ☐ Queen Breeder
- ☐ Bee Trader
- ☐ Pollination
- ☐ Beekeeping Supplies
- ☐ Industry Body
- ☐ Other

Q3: Within the New Zealand Honey Industry, what do you primarily work with?

- ☐ Honey: Non-Mānuka
- ☐ Honey: Mānuka
- ☐ Bees: Breeding
- ☐ Bees: Propolis, pollen, royal jelly or wax
- ☐ People: Beekeepers, farmers/growers for pollination
- ☐ Other

Q4: Within the New Zealand Honey Industry, where are you primarily based?

- ☐ Northland/Auckland/Hauraki Plains
- ☐ Waikato/King Country/Taupo
- ☐ Coromandel/Bay of Plenty/Rotorua/
- ☐ Poverty Bay
- ☐ Hawke's Bay/Wairarapa/Manawatu/
- ☐ Taranaki/Wellington
- ☐ Marlborough/Nelson/West Coast
- ☐ Canterbury/Kaikoura
- ☐ Otago/Southland

Q5: Do you think the New Zealand Honey Industry provides you with a sustainable livelihood?

Q6: Why do you think that?

Q7: What is ONE thing you would change about the livelihood the New Zealand Honey Industry provides you? Why?

Q8: What is ONE thing you would NOT change about the livelihood the New Zealand Honey Industry provides you? Why?

Q9: Do you think there would be an advantage in having a less fragmented New Zealand Honey Industry?

Q10: Why do you think that?
Q11: What is ONE thing you would change about the New Zealand Honey Industry's structure? Why?
Q12: What is ONE thing you would NOT change about the New Zealand Honey Industry's structure? Why?
Q13: Do you think the New Zealand Honey Industry communicates effectively with you?
Q14: Why do you think that?
Q15: What is ONE thing you would change about the New Zealand Honey Industry's communication? Why?
Q16: What is ONE thing you would NOT change about the New Zealand Honey Industry's communication? Why?
Q17: Do you think the leaders of the New Zealand Honey Industry are doing a good job generally?
Q18: Why do you think that?
Q19: What is ONE thing you would change about the New Zealand Honey Industry's leadership? Why?
Q20: What is ONE thing you would NOT change about the New Zealand Honey Industry's leadership? Why?
Q21: Do you think the New Zealand Honey Industry has a clear vision of the future which inspires and unites the industry?
Q22: Why do you think that?
Q23: What is ONE thing you would change about the New Zealand Honey Industry's vision? Why?
Q24: What is ONE thing you would NOT change about the New Zealand Honey Industry's vision? Why?
Q25: Does your work within the New Zealand Honey Industry fulfil you and give you a sense of purpose?
Q26: Why do you think that?
Q27: What is ONE thing you would change about your feeling of fulfilment from working within the New Zealand Honey Industry? Why?
Q28: What is ONE thing you would NOT change about your feeling of fulfilment from working within the New Zealand Honey Industry? Why?
Q29: Is there anything else you would like to add?