A Great Story To Tell
"The IFP Good Apple"

Anna Lorck
Kelloggs
November 17 2003

Acknowledgements

Thanks to the enthusiastic students of Hastings Intermediate who have eagerly taken up the challenge of becoming apple growers so that they can help tell other New Zealanders about the amazing transformation that has gone on in pipfruit orchards.
Without their help, I would not have gathered such a huge amount of valuable information about household consumers.
Thanks also to group of New Zealand media who took time out of their busy schedules to participate in my research. They have added constructive and interesting feedback giving their perspective as key influences of New Zealand consumers
I would also like to acknowledged the vision of Paul Browne, General Manager of PGNZI, who has willingly supported me, both in funding and senior guideance of the implementation of the IFP pilot school programme, to which this research is integrally linked.
The only way ideas become reality is if someone is takes up the challenge and runs with them.

Table of Contents

Executive Summary

Background

Consumer research has been identified as one of the key recommendations that Pipfruit Growers of New Zealand (PGNZI) undertakes as part of a three-tier public awareness strategy on Integrated Fruit Production (IFP).

The research will help provide insight into what motivates the shopper to buy apples or pears, and identify levers to influence the various target groups. It will also help test the generic value brand in IFP and what it means.

Objectives

- Provide PGNZI with an insight into what motivates consumers to buy apple and pears
- Provide PGNZI with an insight into consumers awareness of how pipfruit are grown in New Zealand
- Identify the level of consumer's awareness about
    - Sustainable and Safe fruit qualities
    - Integrated Fruit Production
- Identify the best levers to inform and influence consumers
- Identify if "IFP" has enough in a term to stand alone as a generic brand

Research Highlights Summary

<u>Household</u>

- Nearly three quarters of New Zealanders are eating apples as a regular part of their diet, but a quarter are not eating apples at all.

- From a young age children tell us they have a direct influence in what goes into the shopping basket, and what they choose to eat.

- Consumers still have a strong perception that they must wipe and wash pipfruit before eating it. Some have linked this to wanting to clean the fruit of residues/sprays/toxins.

- Consumers believe that the best thing about an apple is that it looks good, followed by taste and texture.

- Consumers knowledge of how apples are grown in New Zealand is limited, regardless of age.

Media

- Media outside the industry sector have no understanding of IFP, and the level of IFP knowledge among industry media was limited. Because of this they can not influence until they have more knowledge.

- Media identified point of sale information as a key information tool to promote IFP and safe sustainable fruit to consumers.

- Media still believe apple growers are heavy users of chemicals and pesticides

- The number one food/health safety issue for Media is the level of chemicals and sprays used on fruit.

- Overall media perceive the general consumer has little interest in an apple beyond price and its physical attributes.

- Media identified Five+ a Day as a successful marketing campaign to target consumers, which IFP could piggyback. It raised awareness of healthy eating.

- Media believed IFP, as a name on its own, needed to be more consumer friendly with a simple, effective explanation/term.

Recommendations

- Add value to the already existing 75% consumer base by:

    - Educating media on IFP so that they can become positive influencers.
    - Educate consumers through marketing at point of sale, so they too become positive influencers.

- Investigate a joint promotion, beyond the $10,000 sponsorship that PGNZI already gives, to 5+aday.
- Further research and discussions are required with other industry stakeholders (exporters, marketers, all who have developed their own brand) to look at a generic quality trademark that can easily be associated to IFP and their each apple brand.

Introduction

Integrated Pipfruit Production

Integrated Pipfruit Production (IFP) is New Zealand Pipfruit Growers' commitment to produce safe apple and pears from a nurtured and sustainable environment. This brings together careful management of soil, water, pests and diseases to grow healthy trees and fruit.

In less than half a decade New Zealand's pipfruit production has undergone an amazing transformation from depending on agrochemicals to one that is highly in tune with environmental best practice and sound science.

This fundamental shift in production philosophy ensures that nature's own solutions are applied before resorting to synthetic and man-made applications.

In its simplest sense, IFP outlines an integrated approach to pest and disease management which: encourages monitoring to determine pest and disease thresholds have been exceeded before spraying; gives preference to non-chemical controls wherever possible; and when chemical controls are needed, gives preference to the use of 'targeted' sprays such as the insect growth regulator chemicals and Bacillus thuringiensis (B+) sprays which are less toxic and are more specific to particular pests, thereby allowing pest predators and parasites to be effective.

This contrasts with the previous approach of calendar schedules of broad-spectrum pesticides, as approach designed to maintain a toxic environment to prevent any pest establish, which produced orchard systems devoid off beneficial fauna and so totally dependent on continued pesticide intervention fro pest and disease control. (ENZA 1996; McKenna and Campbell 1999).

It is a dynamic system that is continually evolving. NZ Pipfruit Ltd is committed to on-going research, development and introduction of new or improved IFP practices. This research is often hand in hand with development of organic systems as the two processes are closely related especially in the realm of IPM.

Orchards – once baron of any signs of insect life - are now home to many of nature's little creatures.

IFP is a production-based programme that ensures our production practices are sustainable and as safe as possible for the environment and human health. NZ Pipfruit IFP bestows on our industry an ability to ensure our markets that our production system has environmental integrity.

The Integrated Pest Management (IPM) component is based on on-orchard monitoring programmes resulting in a required and auditable, justifiable use of a limited range of 'soft' chemicals. These chemicals are also benign to beneficial organisms such as predators and parasites.

All materials applied to an orchard, even nutrients, is recorded on a diary that is part of the audit system.

How it came about:

While the New Zealand pipfruit industry has been recognised throughout its history as a producer of high quality fruit, there has been increasing pressure from both consumers and trade regulators to formalise production practices that are ‘safe’ and guarantee minimum consumer risk through unacceptable chemical residues. (McKenna and Campbell 1999).

These trade and consumer pressures are not unique to the pipfruit industry. Since the completion of the GATT Uruguay Round in 1995, certain key markets for New Zealand produce – particularly Europe and Japan – have quickly moved to replace tariff barriers with a new form of trade protection.

Consequently, a number of prominent exporting organisations, particularly in horticulture, have initiated moves to reconfigure their production systems in order to meet these emerging regulatory, distribution and consumer demands.

IFP represents an intermediary step toward industry ‘greening’ as it impels conventional growers to adopt a number of less chemically-intensive management technique’s without adopting the entire rational of organic production.

The New Zealand Pipfruit Integrated Fruit Production Programme for pipfruit (NZP IFP-P) was developed by ENZA New Zealand (International) in conjunction with HortResearch and other specialists. It started in, 1996, undertaking a pilot programme with approximately 60 pipfruit growers from around the country. (Helen Percy Hort Fact 1996).

Many of New Zealand’s offshore and local consumers are increasingly demanding fruit which has been produced with consideration for the environment. It is this market demand, as well as other reasons for cutting down on pesticides (health, cost and the environment), which motivated orchardists to adopt the NZ IFP-P programme. One day, orchardists may not have a choice. Pest and disease resistance to pesticides is a reality. In addition, many markets are seeking NZ IFP-P as requirement rather than a preferred option.

IFP – an untold story

Today, November 2003, New Zealand pipfruit growers have reduced the use of organophospate number of sprays used on orchards by 95 percent, since the introduction of IFP in the 1997 season.

New Zealand consumers have some of the safest apples in the world – but New Zealand consumers don't appear to know about it.

Another challenge is that the organic movement is perceived to have far greater support and kudos among New Zealand consumers. In contrast, the hard work and major advances and progress IFP growers have made in the last five to six years have gone relatively unnoticed.

To investigate the best ways to help tell the IFP story Pipfruit Growers of New Zealand actioned the development of a strategy to build public awareness and understanding of IFP.

The overall aim of the strategy is to increase the Value of the IFP apple – "I am a good IFP apple – in tune with today's thinking and values."

To achieve this goal PGNZI would need to:

- Motivate Growers
- Excite Consumers
- Inform Regulators, Investors, Commercial Interests
- Influence Politicians and Government

Target Audiences – three critical paths were identified to hit the target audiences:

Point of Sale – **Hit the Customer/Consumer**
Direct – Motivate - Inform
The Big Idea – **Hit the Consumer**
Educate – Confirm - Endorse
Profile and Publicity – **Hit the Market**
Influence - Involve

Consumer Research fits within Point of Sale as the first tier of this strategy.

The "big idea" second tier has been built around the concept of developing an education resource, which fits within the exiting school curriculum. It looks to encourage children, as a key household ~~consumer~~, so they learn about and begin to understand IFP principles through direct linkages to growers and the orchard.

The third tier is <u>publicity and profile</u> raising, which aims to increase consumer awareness about IFP through telling a range of stories developed from Point of Sale, and the school pilot programme tiers.

Each of these tiers, are running separately but simultaneously along side each other – so that they bounce, feed and reinforce at every opportunity.

2 Methodology

Hit the Consumer at point of sale

Media and Children activity based.

The two Consumer Research components identified are households (as consumers) and media (as key influencers).

The research findings will help pave the way for identifying and developing consumer driven activities at point of sale.

2.1

CONSUMER research
Household – children based

The school pilot Grow Your Own Apple Programme is as an excellent opportunity for the students, as household consumers, to help with the consumer research.

Reaching the Growing Minds of Children

- IFP school pilot programme

PGNZI has embarked on an exciting school pilot programme which encourages children to learn, interact and understand the basic principles about Integrated Fruit Production.

The PGNZI initiative aims to captivate the growing minds of children through direct linkages with growers and their orchards, as well as the other industry sectors.

During the fourth term of 2003 about 100 children from Hastings Intermediate have been following the monitoring quarter of the IFP year as “owners” in a block of Fuji trees.

From creating pheromone traps and counting bugs, through to helping make decisions about if and when to spray, the students are taking a hands-on role.

They are being encouraged to think for themselves, participating in real and relevant orcharding decisions – and in doing so will drive the learning process.

The key to the pilot's success is clearly linked to its ability to fit within the existing school curriculum of ICT (Information, Communication and Technology production and process). It is also includes activity-based projects and outside the classroom learning.

The overall aim of the pilot is to determine its capability as a teaching resource at a national, and potentially international, level.

In doing so it will play an integral part in PGNZI's strategy towards building New Zealand consumer awareness about IFP and its safe, sustainable messages.

In undertaking the research the students, would also gain a greater understanding of the market they are dealing with, and changes, they "as growers" faced in helping increase the value of the IFP good apple.

Classroom Research Concept

Students carry out a survey into what their family, friends and neighbours (as household consumers) think about New Zealand apples and how they are grown. The information they gain will:

- Give them a better understanding of the challenge they "as growers of their own apples" face in telling IFP story

- Provide them with information to help them find ways so they can help other New Zealand growers tell the IFP story.

Pilot Students

The pilot programme involves 70 students, aged 10 and 11, and is run in three class groups. The first group is ten students who have been "hand-picked" to test out each lesson and there are two larger classes (30 students). The No 1 group is running a week ahead of the general classes. This allows for lesson to be tested and improved.

Methodology

An hour lesson on undertaking research and conducting a survey. The students developed and then used the same five questions for their survey. They used computers to format their own questioner.

They asked their questions by face-to-face interviews and using email.
All students were given a week to collect their data.
The data has been collated and the results will be reported back to the groups.

Lesson Activity

- General Classroom discussion – to trigger thought process
- What is a survey, why do we need research
- Defining target audience
- Developing Questions
- Coming up with ways to undertake research
- Set out questioner- using computers

Group one undertook individual research and the larger classrooms were broken into groups of five.

<u>Sampling</u>

The students undertook a random survey of 183 respondents:

The respondents represented an excellent and fair cross section of the community.
The respondents were broken down into gender, 10- year age brackets and ethnic groups.

The highest overall number of respondents surveyed were female New Zealanders, aged 10-20 years. The highest group of males were in the same ethnic and age bracket.

Just under half of the survey respondents were children (under the age of 20). Based on the intermediate school age of those who conducted the survey it would be fair to expect most of the respondents interviewed to be between 8 and 12 years.

However, an even number of adults were also interviewed.

Children (under the age of 20) represented:	90 respondents (49%)
Adults (over the age of 20) represented:	93 respondents (51%)

Maori represented 36% of the respondents.

The highest number of Maori respondents surveyed were males in the 10-20 year bracket, followed by females in the same age group.

The lowest overall respondents surveyed were females under the age of ten from other ethnic backgroups outside New Zealander/Pakeha and Maori, followed by males in the same group.

Gender Representation: Females 104 (57%) Males 79 (43%).

Ethnic Representation: NZ/Pakeha 96 (52%)

	Maori	67 (36%)
	Other	20 (11%)

Age Representation:	Under 10 years	27 (15%)
	10-20 years	63 (34%)
	20-30 years	24 (13%)
	30-40 years	37 (20%)
	40+	32 (17%)

Age/Ethnic Representation:

Female – 90 respondents

Age bracket	Total	NZ/Paheka	Maori	Other	%
Under 10 years	**14**	7	6	1	13%
10 -20 years	**35**	19	14	2	34%
20-30 years	**10**	3	5	2	10%
30-40 years	**25**	15	8	1	24%
Over 40 years	**20**	14	4	2	19%
Total	**104**	**58**	**37**	**8**	
%		56%	36%	8%	

Male

Age bracket	Total	NZ/Paheka	Maori	Other	%
Under 10 years	13	7	6	1	16%
10 -20 years	28	11	13	4	35%
20-30 years	14	7	4	3	18%
30-40 years	12	8	2	2	15%
Over 40 years	**12**	5	5	2	15%
Total	**79**	**38**	**30**	**12**	
%		48%	38%	15%	

Male/female

Age bracket	Total	NZ/Paheka	Maori	Other	%
Under 10 years	27	14	12	2	15%
10 -20 years	63	30	27	6	34%
20-30 years	24	10	9	5	13%

30-40 years	37	23	10	3	20%
Over 40 years	32	19	9	4	17%
Total	**183**	**96**	**67**	**20**	
%		52%	36%	11%	

Lesson plan appendix:
Survey format appendix

MEDIA research

Rational
To help us better understand consumer perceptions, seek feedback from food, consumer and industry media, as key influences.

Sampling Method

Thirty media including food writers, and consumer, health and trade journalists were asked to take part in an email survey.

The survey questions were developed in consultation with PGNZI

~~The~~ questions were directly emailed to journalists. A total of 11 out of 30 responde~~nts~~d .

While a respondent rate of just under half third might be considered an average result, it is important to consider:
- Media are a difficult target market because they busy and often under pressure
- IFP is not a hot news topic.

Based on the information received respondents took between five and 30 minutes to complete the questioner

The respondents represented a good equal cross section of specialist media across agri-business, consumer/food, general news, television, radio and print. Five were from the Auckland region and four from Wellington, and one from Hawke's Bay, and one from Christchurch.

Nine respondents were happy to have their names included in the list of media who took part in the providing research information. They were:

Belinda Allen (Research writer Consumer Magazine)
Kent Atkinson (New Zealand Press Association Agribusiness journalist)
Rose Harding (Hawke's Bay Today agricultural journalist)
Kevin Iken (Radio New Zealand agribusiness journalist)
Jon Morgan (Dominion Post agribusiness journalist)
Liz Parker (Editor NEXT magazine)

Ruth Pretty (Dominion Post food writer)
Jo Seager (national television personality and food writer)
Hugh Stringleman (*NBR, Country-Wide/Farmers Weekly*, *Food New Zealand* magazine, UK *Farmers Weekly*, Japan's Agricultural Daily and others.Researcher Grassroots Business,TVNZ)

3 Findings

3.1 Consumer/Householder Hastings Intermediate School Survey

3.1.1 Apple Consumption

- 73% of respondents eat apples regularly. Just over half of them are eating up to four apples a week, the rest are eating at least five a week.
- 27% of respondents are not eating apples.
- Overall, females are eating more apples than males.
- The highest group of individual consumers are females in the 10-20 age group. Based on the accurate cross-section representation of ethnic groups, we can assume that this group are New Zealand/Pakeha. However, adult women over the age 20 are eating more apples than those under the age of 20.
- In the male groups, again those between the age of 10 and 20 are the highest consumers, however more than half the adult men have apples as part of their diet.
- The lowest group of consumers are men and women over the age of 40.

<u>Numbers of Apples Eaten A Week</u>

Females	totals	0	<5	>5	%
Under 10 years	14	4	5	5	13%
10-20 years	35	7	17	11	34%
20-30 years	10	2	2	6	10%
30-40 years	25	8	8	9	24%
40+ years	20	2	7	11	10.5%
totals	**104**	**23**	**39**	**42**	
%		22%	37.5%	40%	

Males	totals	0	<5	>5	%
Under 10 years	13	4	8	1	16%
10-20 years	28	9	13	6	27%
20-30 years	14	4	6	4	18%
30-40 years	12	5	6	1	15%
40+ years	12	4	4	4	15%
totals	79	26	37	16	

		33%	47%	20%	
Males/Females	totals	0	<5	>5	%
Under 10 years	27	8	13	6	16%
10-20 years	63	16	30	17	27%
20-30 years	24	6	8	10	18%
30-40 years	37	13	14	10	15%
40+ years	32	6	11	15	15%
totals	**183**	**49**	**76**	**58**	
%		27%	41%	32%	

3.1.2 Who gets a say in what goes into the shopping basket

- Children from a very young age are influencing what goes into the shopping basket.
- Of those children, 77% said they were having a direct say by asking or telling their parents or caregivers what they wanted them to buy. Of the 23% who were not having a say, only a fifth were under the age of 10.
- From this we can assume, that children over the age of 10 are deciding for themselves what food they will eat. This group also identified the "shopping list" as a key tool to helping them get their choice across.
- In the adult bracket, 20 years and over, only 26% of men are making shopping choices on their own, compared with 53% of women.
- Women, as partners, caregivers, mothers, grandmothers and wives still do most of the supermarket shopping.

3.1.3 What are the three best things about an apple.

- Regardless of age, overall consumers regard the **look** of an apple (colour and shape) as its best attribute, followed by **taste** and then **texture** (crispiness and crunch). Other positive attribute identifies by more than 20% of respondents included juiciness and price.
- By the age of 10, consumers are identifying that price is an important factor in buying an apple.
- Respondents under the age of 20 did not identify health as a benefit. Adults also scored health at a low 8%.

3.1.4 What do you do to an apple before eating it.

- More than half (55%) of respondents wash their apples before eating them. The use of sprays was identified as a reason for washing apples.

- Quarter of the respondents likes to wipe and polish their apples – this also related to making the apple feel good factor, where consumers linked looks as the most appealing apple attribute.

- Fewer than 17% of respondents felt happy about just biting into an apple, without washing or wiping it first.

- Checking the apple for bruises, and peeling the skin were also identified as things to do before eating the fruit.

3.1.5 What do consumers know about how apples are grown in NZ

- About 36% of respondents said they knew nothing, or very little about how apples were grown.

- Of those who did, the level of understanding was generally poor with 21% relating this to "apples growing on trees".

- Children under the age of 10 could identify that apples grew on trees and that Hawke's Bay was an apple growing region. The story of Snow White came through, along with possums enjoying the odd apple or two.

- By the age of 10, respondents could associate apples with growing in orchards in Hawke's Bay and involved work, that apples were seasonal, there were many varieties and that they were exported.

- From the age of 20, there were about 10% of respondents who identified themselves as working the apple industry.

4.1 Media Research

4.1.1 Sustainability

- Respondents recognised sustainability as: retaining freshness, where fruit was free of disease, blemishes and properly handled and looked after.

- Fresh fruit was linked sustainability but also to protecting, caring for and being responsible for the environment.

- Genetic Engineering and organic were identified as attribute traits.

4.1.2 Food Safety

- All respondents associated food safety to chemical residues and sprays.

- Respondents also identified food hygiene, food free of disease, contamination and non GE as attributes of food safety.

- There was a high level of concern about what sprays are being applied to food.

"We are always conscious about washing fruit before we serve it, but once again, the imported fruit always worries me, particularly the Californian fruit. You do wonder how sprayed that is."

"You worry about what has been sprayed on it and I wish they'd tell you on the label."

4.1.3 New Zealand apple and pears and sustainability and food safety.

- Overall respondents recognised New Zealand apples and pears as sustainable and safe to eat.

- All favour eating locally/New Zealand grown fruit over imported fruit.

- The level of sprays used on orchards was a major concern for more than half the respondents

- Varying quality (sustainability) of apples on the supermarket shelf was highlighted as a concern.

- Media linked sustainability to commercial aspects rather than the environment

- There is concern that deregulation could lead to fragmentation and weaker controls for food safety.

"I would always choose New Zealand apples and pears over any others".

"Good, responsibly produced fruit, on environmentally sound principles, in plantation-style orchards".

"My feeling is that New Zealand apples and pears are grown reasonably sustainably but probably have lots of spray and pesticide on them. (except those that are organic)."

"High regard of the quality of NZ apples and pears, inrelation to sustainability and food safety".

"I often suspect many of the supermarket apples have been kept too long in storage"

"My "impression" is that under the new industry structure there will be less enforcement (exporters not wanting to antagonize potential suppliers by insisting that they comply with complex audit requirements etc) and a fragmentation of approaches to meeting increasingly complex demands of retail customers."

"I think they (pipfruit growers) are growing in order that their businesses are sustainable (instead of in a particularly "green" way) and I think they ensure food safety by ensuring the fruit is free of disease and pestilence".

4.1.4 Media perception of consumers' understanding and expectation of sustainability and food safety

- All respondents believed consumers could identify with safe food but apart from the "educated" foodie that's where the level of understanding stopped.
- Nine of the respondents believed general household consumers tended to be apathetic and generally unaware of sustainable attributes.
- Ten respondents firmly believed general supermarket consumers were more interested in price, and then quality.
- Media regarded the general level of expectation among consumers as either poor or blaze

"I don't think that most consumers think about I (organic/non-organic)t. When asked questions for a survey they will express opinions – and know what the "right" or politically correct answers to sustainability questions – but I don't think they have very sophisticated expectations when they get to the supermarket."

"Most consumers at local supermarket level care little beyond price and whether or not they can peel the "plu" stickers off the fruit. The main exception to this is mothers who are cautions if they believe a particularly product line may be heavily sprayed. Apart from that, the primary concern seem to be, after price, the initial and keeping quality of the fruit, eg if the apples are soft and meal".

"I don't think people worry too much about it".

"Food safety is more of an issue than sustainability, and there's probably a general assumption that if it's fresh, it's good for you".

4.1.5 Opinion between relative qualities of non-organic and organic growing conditions

- Respondents were equally mixed in their support towards non-organic and organic growing conditions.

- City media confirmed there was a growing awareness and preference for organics – it is seen as trendy.
- Consumer organic support tended to be supported by perception rather than fact.
- Eight of the respondents held non-organic in very high regard

"From a point of view of me as a consumer, I can't see the difference. I think the difference is an ideological one – you're either into organics or your not. Most of the relative differences are perceived rather than actual. Is organic production rally more sustainable? Who knows but people who buy organics will have a very firm view, not backed up with fact at all, just perception and a "belief" system that tells them they are right".

<u>Organic viewpoints:</u>

"There seems to be a growing awareness and preference for organic in a city like Auckland. The women in our office are increasingly prepared to pay more for organic produce in the supermarket and frequent organic shops".

"It creates a feeling of non-factory grown food, as if it were produced in the consumers own garden".

"Lower yields, marked fruit, little difference in taste, except where they have been ripened on the tree, in contrast ot other fruit picked too early, little consistency, but often grown by people I know or know of".

"Growers are keen to reduce use of sprays and chemicals, generally where practical but they also have to meet export statndsards relating to size, appearance etc. I wonder if there is a clash sometimes" .

"I am aware that some of the sprays used by organic growers have long since been discarded by conventional growers because they are too dangerous. I am also aware organic growers use more composts and soil conditioners to enhance the overall health of their soils. A healthy soil is supposed to mean healthier trees more able to fight off pest and disease".

"Good, but no better than non-organic".

<u>Non-organic viewpoints</u>

"I think most non-organic growers have a really positive attitude".

"I'm sure non-organic is of a high standard".

"Probably have been grown with quite a bit of spray involved".

"They are treated with chemicals, and grown by companies likely to embrace GE technology".

"Divides into two groups, those that spray everything in sight and those that take an IPM approach. They produce similar product, but I suspect there is a much greater need to wash the sprayed fruit, and there is a strong suspicion that some fo the sprays/chemicals are systemic and so can't be washed off".

4.1.6. Understanding of non-organic growers' attitudes towards sustainability and food safety

- There remains a perception that non-organic growers use a high level of sprays on fruit
- While media identified non-organic growers had a positive attitude there was a degree of caution about how this was defined.
- Four media felt growers would be "forced" rather than voluntarily move towards sustainable and safe growing practices
- The level of awareness varied between the different media sectors

"I think they are growing in order that their businesses are sustainable (instead of in a particularly "green" way) and I think they ensure food safety by ensuring the fruit is free of disease and pestilence".

"Organo=phosphate sprays are no longer used and growers now spray according to need rather than by the calendar".

"I think that they are getting more sophisticated – particularly the larger growers – but that they will fill a whole spectrum from the "I've always done it this way, buggar the greenies" to people who have embraced these issues and are working very hard to address them. In general I think if you have a continuum from "traditional" farming to organic farming, the bulk of growers have moved way closer to the organic end of the spectrum than they were, say, 10 years ago".

"They (journalists) still believed that they were a highly-sprayed fruit".

"That care is taken not to compromise the safety of the customer but there is much pressure to produce a reasonable return for investors".

4.1.7 Media Understanding of Integrated Pipfruit Production

- Eight of the respondents had "no idea" what IFP was or meant

- Of those who did know about it, their knowledge was very limited, apart from specialist media

"Limited awareness – not a very descriptive or precise term".

"I'm aware of the IFP initiative and understand the most significant change in this regard to be in scouting and monitoring / thresholds before spraying ie still comes down to agrichemical issues".

"IFP is working with the life already present on an orchard to control pests and diseases rather than wiping everything - good and bad – out".

"Monitoring for pests and diseases, using pheromone traps and other methods so that the grower only sprays when pest levels require it, not as a matter of routine".

4.1.8 How they have gained their understanding of IFP

- Those respondents who knew about IFP were basically going on what they had heard, or been able to find out
- This identifies a need for media to know more
- Media understanding of IFP is poor

"From reading Orchardist magazine".

"So I have been told when I have asked".

"I don't have a big understanding of integrated fruit production but I know it is how we try and operate our garden here. We use as few sprays and chemicals as possible. We try to companion plant. When we spray we try to spray with non-chemical sprays. We do need to keep the ground clear of weeds, so we do use toxic spray for big weed control. We are very careful though to do it on a still day, and whoever sprays wears a mask and protective gear. We buy insects to control some of the pests on things like tomatoes. We move crops around and don't overwork the soil".

"Our understanding is that IFP is more a production orientated programme rather than a holistic one – does not cover many areas that overseas, particularly UK based supermarket, customers are looking for".

"Information sourced on the Internet".

4.1.9 What could pipfruit growers do to ensure consumers have a better understanding of safe, sustainable fruit?

- All media identified point of sale information as critical to informing consumers
- Half the respondents identified introducing a quality market/brand at point of sale
- Point of sale information needs to be integrated across all marketing/promotion
- Media called for growers to be more proactive
- Media identified generic value in the word/term "whole" "wholesome".

"Point of sale information, a fruit quality mark linked to production practices, which is highlighted in promotion, advertising and press releases".

"Keep publicising their protocols and achievements".

"Be more proactive in letting NZ consumers know what has changed on orchards in the last 10 years".

"I think if New Zealand apple and pear growers approached food writers or journalists generally and explained their systems to them, then it might filter through to consumers. Perhaps they need to educate people in supermarkets also".

"This is a branding exercise – need a brand and to follow traditional brand development strategies. "Integrated Pipfruit Production" is not it – sounds are to industrialized to for the kinder, gentler, greener image they are trying to create. Something like "Whole Fruit" with a strict audit requirement across all aspects of the farm and production/sustainability issues would be required".

"Advertise and tell people and put stickers on their fruit".

"Support programmes in schools which show a middle ground between chemical use and certified organic".

"Communicate with consumers at point of sale and using other media channels, like print and television".

4.1.10 Motivation behind people buying pipfruit

- Respondents identified that consumers enjoy eating pipfruit

- Respondents determined motivation, beyond price, was linked to the good features of the apple – taste, looks, texture

- The homegrown aspect of apples also appeals to consumers, as well as availability
- The feel good factor about fruit is a key driver, and some respondents linked this to the success of the 5+ a day marketing campaign

"It's a regular part of the diet".

Taste, country of origin (New Zealand fresh produced is perceived as high quality), seasonality, familiarity with the ENZA brand, nutrition (Five+ A Day campaign)".

"The basics first – looks and taste and texture, albeit that the latter two are a result of trial. Then emotive things like New Zealand's image. In a crowded market the size that ENZA grew to before deregulation was also a help as it created visibility. Now that there are lots of NZ brands it may be difficult to maintain the values that ENZA fruit built up".

The feeling that the fruit is "home grown"

4.1.11 Encouraging more people to by New Zealand pipfruit

- Respondents identified better presentation at the consumer market end as a key driver to buying fruit.
- Respondent believed consumers needed to be better informed about the food they eat
- By the end of the survey respondents were starting to assume that pipfruit growers had an interesting story to tell
- They identified a wide range of marketing initiatives from supporting health programmes, piggybacking the Five+a day campaign, through to better displays in supermarkets

"Talking consumers about reduced chemical use might work but price, appearance and eating quality will continue to be important".

"Better presentation in supermarkets here and overseas. Too much fruit is simple poured into display bins and is bruised and damaged in the process".

"Giving the impression that the market is interested in pursuing a safe and wholesome product".

"Marketing and promotion at point of sale, build on the knowledge aobut Five+a day to ensure apples and pears are part of a healthy diet".

"Health endorsements – build on the apples/teeth imagery. Piggyback the Five+ a day campaign".

5 Summary and concluding comments

Developing a generic value brand

Before undertaking the research, we do not know whether "IFP" held enough in its name and meaning to build a generic value brand. Will target audiences grasp what IFP stands for, Is it sexy? or will one of its Safe, Sustainable, Smart values become the brand themselves?

This research did not seek to make recommendations one way or the other but in roll out has identified that IFP has potential to add value at point of sale, therefore increasing sales value both domestically, and internationally.

It has provided recommendation so that PGNZI is in a better position to make an informed decision about looking at branding.

Further research and discussions are now required with other industry stakeholders (exporters, marketers, all who have developed their own brand) to look at a generic quality trademark that can easily be associated to IFP and their each apple brand.

APPENDIX

Consumer Research

Hastings Intermediate
Research Lesson Plan

Consumer Household Research

There has been an amazing change on the orchard!
New Zealand Pipfruit (apple and pear) growers are now producing the safest to eat, brightest and best apples by working with nature to fight pest and disease instead of relying on toxic sprays and chemicals.

For example insects that hurt the apple are now being stopped by predatory insects. Ladybird kills the aphid.

Fly Spray example – what do we do to kill flies – we use fly spray – which also kills the friendly spider (who doesn't hurt us) – a natural predator. But if we were happy to live with spiders they could do the job for us.

Spiders now happily live on orchards (five years ago they didn't because they died along with all the bad insects when growers sprayed). Letting them live as part of the orchard is part of IFP – Integrated Fruit Production. Other parts of IFP include looking after the soil, water and environment.

But hardly anyone knows about it. We need to help tell the story and find the best ways to do this.

Our Challenge

Outcome: We want to know more about why people do or don't buy apple and pears so we can come up with ways of encouraging them to buy even more.

- Who are we going to ask? – family/friends/neighbours – a good mix of age/gender/occupation
- How many questions? – about five – don't want to take up too much of people's time
- Format – we are looking for comment/feedback our research is qualitative rather than quantitative (number/percentages)
- How will we ask them? – in person/over the phone/give people a questioner?
- What type of questions? – open ended - positive
- What will the questions be?

Disclosure: give reason for doing the survey. Ask if they are happy to have their name on their survey or remain anonymous

Once we get the information – how we process it – report?
Then look at what the results and look at how to help tell the story.

Students Questions developed from the lesson:

1. How many apples/pears do you eat a week?
2. How do you get a say in choosing the fruit you eat?
3. What are the best three things about an apple and a pear that makes you want to buy/eat it.
4. What do you do before eating or biting into an apple/pear (wash/wipe/nothing?) and why?
5. What is important to you about how apples are grown in New Zealand?

Media Research

Questioner for Media

Integrated Pipfruit Production – Research project

Questions:

- When considering fresh fruit and sustainability what qualities/attributes come to mind?
- When considering fresh fruit and food safety what qualities/attributes come to mind?
- In regard to sustainability and food safety, how does this reflect on your impression of New Zealand apples and pears?
- What is your perception of consumer's understanding and expectations in regard to sustainability and food safety?
- What is your opinion on the relative qualities associated with

    - NZ apples and pears grown under Organic conditions?
    - NZ apples and pears grown under non-Organic conditions?

- What is your understanding of non-Organic growers' attitude to sustainability and food safety?

- Are you aware of any significant changes to production/growing systems for apples and pears in regard to sustainability and food safety?

- What is your understanding, if any, of Integrated Fruit Production?

- Why do you have this understanding?

- What do you consider NZ apple and pear growers could do to ensure consumers have a sound understanding of the principles of growing safe, sustainable fruit?

- Apart from price, what do you believe motivates people to buy fresh NZ apples and pears?

- What do you believe would help encourage people to buy more NZ apples and pears?

Further comments

I am happy for my name to be included in the list of people who took part in this research: YES/NO

Background: I have been a rural journalist in Hawke's Bay for more than 10 years and have specialised in horticulture and agriculture. For the past four years I have been a pubic relations consultant, focusing on the primary sector.

I will present my project to PGNZI, and the fellow 28 scholars on my course, as well as sharing the results with those of you who take part in the research. My long-term goal is that my project will be used to help educate New Zealand, and potentially overseas consumers about IFP.

Disclosure: I currently work as a consultant with Pipfruit Growers of New Zealand. This research project is totally voluntary and undertaken in my own time. I am not receiving any financial payment for the project.

Anna Lorck