Improving the market development for Asian vegetables

Dr Jenny Ekman
Rural Industries R&D Corporation (RIRDC)

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Improving Market Access for Asian Vegetables

by Jenny Ekman

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Foreword

The Asian vegetable industry has grown significantly in recent years and continues to expand. Increased consumption has mostly been driven by those ethnic groups already familiar with the products; while the majority of Australians still purchase Asian vegetables rarely. Previous research identified two main barriers to increased purchases - confusion caused by different names for the same vegetables and little knowledge of how to prepare and cook the vegetables.

The first part of this report describes the development of a standardised naming system for Asian vegetables. The project achieved consensus between the major retailers, wholesalers and growers on names for the 14 most important Asian vegetable crops. These names have been subsequently promoted and used by the industry, reducing the confusion among supply chain members.

The second part of the report examines the current retail profile of Asian vegetables and the consumer attitudes to these products. Understanding consumer needs has enabled the development of a marketing strategy which could be used to promote Asian vegetables to the wider community.

There are major opportunities to increase sales of Asian vegetables by linking quality products with accurate and targeted information. Expanding the market for these products would help increase returns to growers and create opportunities for investment in the future of this industry.

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Peter O'Brien
Managing Director
Rural Industries Research and Development Corporation

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This project would not have been possible without the considerable input and backing of members of the Asian vegetable industry and associated supply chain members. These have included:

Alison Anderson	NSW Farmers / Horticulture Australia
Allan Bugg	Barden Produce
Andrew Drummond	Barden Produce
Billy Lee	Chinese Growers Association
Carol Selva Rajah	Gourmet Asian Cuisine
Colin Hudgson	Woolworths
Craig Charles	Coles
David Chung	Chinese Growers Association
Harriet Harris	Harris Farm Markets
Hua Su	Vietnamese Growers Association
John Drummond	Barden Produce
Kris Gosper	Coles
Kwok Hing Choy	Grower
Luke Harris	Harris Farm Markets
Lyndey Milan	Australian Woman's Weekly
Martin Clarke	Australian Chamber of Fruit & Veg Indust.
Minnie Choy	Grower
Nino Caltabiano	Barden Produce
Richard Mo	A. Clouet (Australia)
Sue Dodd	Sydney Markets
Tristan Kitchener	Coles

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Executive Summary

What the report is about

The Asian vegetable industry is estimated to be expanding at 15% annually (Lee, 2007). Much of the increase has been driven by the growing Asian–Australian population, which has almost doubled since 1996 (ABS, 2007). Other consumers still purchase Asian vegetables rarely. They may be uncertain about what they are called, how to prepare and cook them and what they taste like.

Low demand outside ethnic communities already familiar with these products is one reason returns to growers are very low. This has been a barrier to improvements in infrastructure, production, handling and packaging. Finding ways to increase consumption of Asian vegetables by marketing them to a wider audience could lift returns to growers and improve industry competitiveness.

Who this report is targeted at

This report targets all members of the Asian vegetable supply chain including growers, wholesalers, retailers, food service providores, the food media and even consumers. There is strong interest in Asian vegetables among supply chain members who recognise the category's potential for growth.

Background

The Hassall report (2002) identified that two of the major barriers to increased consumption of Asian vegetables were that (a) people were confused by differences in names and that (b) they did not know what to do with them.

Many in the industry recognised the difficulties caused by inconsistent naming of these products. However, agreement required mediation by a central party to achieve consensus on the names and spellings to be used.

The second issue was more difficult to solve. There was little information on the current status of Asian vegetables at retail or what consumers thought of the products. The industry needed to understand their market better to find ways of overcoming barriers to purchase and encouraging more people to buy Asian vegetables.

Aims

This project aimed to improve the accessibility of Asian vegetables in the Australian domestic market. It had two main objectives:

1. To develop a standardised nomenclature for a range of Asian vegetables and encourage use of these by the industry as a whole.
2. To examine the current retail situation for Asian vegetables and investigate ways they could be marketed more effectively to consumers unfamiliar with these products.

Methods

The first stage of the project – developing a systematic nomenclature – was determined largely by a reference committee of key supply chain members. These included growers, wholesalers, retailers and members of the food media. Results from a national survey were combined with commercial considerations to create a system which was agreed to by the major retailers and other participants.

To develop a marketing strategy in the second stage of the project we evaluated:

- The current status of Asian vegetables in retail stores – quantity, quality, types, price, availability, etc
- How much retail store managers knew about the Asian vegetables
- The drivers for impulse purchases or purchase of unfamiliar vegetables
- The sources of information people use when preparing a new dish or meal
- What consumers thought were the positive and negative attributes of Asian vegetables and why they did / did not buy them.

We also examined the effectiveness of different types of promotion – featuring Asian vegetables at the Royal Easter Show in Sydney and conducting a series of in-store cooking demonstrations.

Results and Key Points

A consistent nomenclature

The committee reached agreement on names for 14 of the most commercially important Asian vegetable lines. These were launched at a media event which generated significant press in newspapers, magazines and radio. This had been followed up with continued promotion through industry publications and production of A1 and A4 size posters distributed to supply chain members. While change takes time, there has been a noticeable improvement in consistency of names given to Asian vegetables, particularly between the two major retailers (who account for approximately 60% of fresh produce sales). The names launch also demonstrated that it was possible to raise the profile of the category at minimal cost.

Asian vegetables at retail

Pak choy and wombok are the biggest selling Asian vegetables with products such as choy sum and gai lan also growing in popularity. Asian vegetable sales represent approximately 2% by value of all vegetable sales at most retail stores. At Harris Farm Market stores, which have a strong emphasis on these products, this rises to over 2.6%, suggesting that the right quality can increase sales.

Asian vegetables are generally cheaper than similar 'European' alternatives such as English spinach and Broccolini. Demand for most products is stable throughout the year and little affected by price. There is little link between retail price and quality, which sends a mixed message to consumers. Sales data suggests that stores could charge more for good quality product without significantly impacting demand.

Store managers generally knew little about Asian vegetables and many would not be able to answer consumers questions accurately. The level of product knowledge was similar at independent retailers and supermarkets. Quality and range varied greatly between stores but was often best in supermarkets located close to the city. Nearly half the store managers surveyed suggested that recipe cards would be the best way to increase Asian vegetable sales. Point of sale materials and in-store cooking demonstrations were also popular options.

Promoting Asian vegetables

Featuring Asian vegetables at a food / agriculture related event (Sydney Royal Easter show) was a practical way of providing a large number of consumers with information about these products. Visitors are likely to be interested in food, an appropriate target market for programs aimed at increasing Asian vegetable consumption.

In-store cooking demonstrations were also generally well received, especially in stores in less conservative, middle class areas. Consumers liked the idea of "doing something for the farmers", were interested in the information provided and reacted very positively when told the products were grown locally to Sydney. It is possible this helped them feel a connection with the products. However, cooking demonstrations involve time, labour and expense. They are most likely to be effective if the demonstrator is very familiar with the products, has a friendly, outgoing personality and is able to set up the display in a suitably prominent position in the store.

Asian vegetables and consumers

With some exceptions, food shopping is still largely the household responsibility of women. Although most (60%) shop in supermarkets for reasons of convenience, there is a strong preference for independent grocers. Independents (especially Harris Farm Markets), were perceived as having a wider range, better quality and cheaper prices than the major retailers.

Food choices are strongly motivated by what other family members will eat. Meat is another important driver – vegetables are chosen to go with meat, seldom the other way around. People are most likely to buy a new or unusual vegetable if they are entertaining, bored with their usual meals or have had a recommendation from friend or family. New recipes are sourced from cookbooks and magazines with the internet an increasingly popular source of information. Enticing displays, specials, and point of sale materials can generate impulse sales in the store; 74% of consumers make at least some of their decisions once they reach the shop.

Only 16% of the internet survey respondents said they purchased Asian vegetables weekly, the remainder being monthly (33%) rarely (26%) or never (25%). While this is probably an overestimation of purchases, it is considerably less than the 57% of face to face survey respondents who said they purchased the products weekly. This overestimation reflects the strong positive image Asian vegetables have as healthy, fresh, local and cheap.

On the negative side, many consumers don't know how to prepare and cook them or what they will taste like. Consumers worry they will create a culinary 'flop' or that their family won't like them. Some feel that these vegetables are for "Asian people", not for them. There are also a significant number who have just never thought about it (31%).

An effective marketing campaign needs to overcome these barriers to purchase. Providing simple recipes, explaining what the vegetables taste like, making sure displays are fresh and attractive and ensuring that store staff can answer basic questions could encourage more consumers to try unfamiliar Asian vegetables.

Implications for stakeholders

There is no doubt that consumers are open to knowing more about Asian vegetables, particularly in the middle and upper middle class demographic groups. Information on flavour, texture and nutritional value as well as how to prepare and cook the vegetables would help break down consumer reluctance to try unfamiliar products. However, success requires cooperation from all those involved in the Asian vegetable supply chain, from grower to retailer, in order to ensure that both good quality products and accurate information are available.

Recommendations

- That industry and government agencies involved with Asian vegetables continue to use low cost methods such as the internet, agriculture related events, media articles and press releases to provide consumers with information on Asian vegetables and promote use of the standardised naming system.
- That members of the Asian vegetable supply chain, in conjunction with the Australian vegetable industry as a whole, investigate ways of funding a well targeted marketing program for Asian vegetables.
- That further research examines the positive and negative implications of the term "Asian" and tests consumer responses to different types of product presentation. Future research should also investigate adding value to Asian vegetables using different types of packaging, presentation or partial processing.
- That the industry reaches agreement on names for those vegetables not covered during this project.

1. Introduction

1.1 Asian vegetables in Australia

Asian vegetables have been grown in Australia since the early-to-mid 1800s, when 40,000 Chinese immigrants flocked to Australia to seek their fortune on the gold fields (www.cultureandrecreation.gov.au). They brought seeds from their home country and grew their own vegetables wherever they were camped. As a result, the Chinese were often healthier than other miners with diets based on bread and meat (Yiu, 199?).

Some of the Chinese immigrants started businesses as market gardeners or became cooks on outback stations. Chinese gardeners have even been credited with saving the population of North Queensland from scurvy during the early days of settlement as it was they who cultivated green vegetables (SBS TV, 2007).

By the late 1800s 75% of the vegetables consumed in Victoria and NSW were supplied by the Chinese. In some areas they still do supply the vegetables; Chinese market gardeners are known to have been growing vegetables continuously in the Rockdale area in Sydney since the 1850s (Planning NSW, 2002). Most grew vegetables familiar to Europeans (Fig 1.0), although there is little doubt they would have cultivated their traditional crops as well. Chinese fruit merchants replaced storekeepers and grocers as the new merchant elite within the Chinese community (Couchman, 2005). They continued to dominate fruit and vegetable growing in Australia until the 1930s (Yiu, 199?).

Figure 1.0 - Chinese fruit and vegetable hawker, circa 1895. Photograph from the National library of Australia. Vegetables appear to include carrots, turnips, beans and cauliflowers.

In a few cases, the vegetables the Chinese grew took on Western names. The shallot is an example. The Chinese – unfamiliar with the small brown bulb from Europe now sometimes called a 'French shallot' translated their green bunching onions into English as 'shallots'. Perhaps this is the first example of confusion regarding Asian vegetable names.

1.2 The Asian vegetable industry

Much has been written about the tremendous potential of the Asian vegetable industry and there is no doubt it has grown significantly in recent years. The Hassall report (2003) estimated that the value of the industry increased from $50 million in 1993/94 to $136 million in 2000/01 while at the same time grower numbers rose from 679 to 1,675. Domestic consumption has certainly increased and it is now estimated that the industry is growing at 15% per annum (Lee, 2007).

Much of this growth in the domestic market for Asian vegetables has been driven by increases in the Australian / Asian population. The number of Australians with Asian ancestry has doubled since 1996 (ABS, 2007). Much of this increase is due to Chinese immigration which may explain why so many of the products now grown in Australia are intrinsic to Chinese cuisine. Vegetables are the most important fresh food item to many people of Asian origin, who are likely to shop at least twice as many times a week as the average consumer (Coca Cola, 2005).

Changing dietary habits among European-Australians are apparently having less effect on total demand for Asian vegetables. The majority of consumers purchase these products rarely, if at all. Two of the main reasons previously identified for lack of penetration of Asian vegetables into the mainstream market are that:

- People are confused by differences in names
- People don't know what to do with them.

This is likely to be one of the reasons that Asian vegetables still represent only 1-2% of all vegetable sales by value. The category remains relatively small even though these products are often cheaper than similar, European vegetables in the marketplace. Members of the Asian vegetable industry see the low returns on these products as a major issue – low profitability results in little investment in infrastructure and loss of growers from the industry.

1.3 Selling more vegetables

The increasing sales of Asian vegetables does not necessarily mean reducing demand for other vegetables. Asian vegetables have features which could help expand the market as a whole – they are quick and easy to cook, inexpensive and nutritious. This makes them suitable for modern, time-poor lifestyles. Asian vegetables could add to total fresh vegetable consumption by;

- Making it fast and easy to cook vegetables at home
- Replacing frozen vegetables in stir fries and other dishes
- Being a quick addition to instant meals eg 2 minute noodles

Asian style diets contain more vegetables than many European style diets. For example, a study by the Produce Marketing Association in the USA found that white Americans spend an average of $192 annually on vegetables whereas Asian Americans spend $359 annually. As a result, expenditure on fresh produce represented 6.5% and 10% of the total food budget for whites and Asians respectively (PMA, 2006). Americans are likely to eat less fruit and vegetables than Australians on average;

- Approximately 77% of Americans eat less than 5 servings of fruits and vegetables daily (PMA, 2007) representing less than 3 cups of vegetables
- Nearly 70% of Australians eat less than 4 servings of vegetables a day, (National Health Survey, 2001).

However, most Australians also eat less than the recommended 5 daily servings of vegetables. This illustrates the potential benefits of 'Asian-isation' of the Australian diet and, of course, eating more Asian vegetables.

1.4 Objectives of this project

The objective of this project was to examine the main barriers to purchase and find ways in which these barriers could be overcome. One of these barriers was considered to be the confusion over Asian vegetable names, so developing a standardised names system was an important first step.

The next stage required understanding the current retail situation and consumer attitudes to Asian vegetables as well as testing some methods of promoting Asian vegetables. This could help the industry develop strategies to meet the needs of retailers and consumers. An effective marketing campaign could increase the total customer base, lift returns to growers and improve industry sustainability. It would also introduce more consumers to the wonderful flavours and textures of some of Australia's exotic and diverse Asian vegetables.

2. Standardising Asian Vegetable Names

2.1 Aim

Talk to anyone involved in the Asian vegetable industry and they are likely to mention the problems associated with differences in names. Asian vegetable names can differ between states, vary between retailers and be spelled in all sorts of ways. The end result is confusion among growers, wholesalers, retailers and consumers.

For example, the large, white stemmed bunching vegetable with dark green leaves commonly called buk choy is also known as Chinese cabbage to some suppliers. Larger growers have had to keep two or even three different labels for their product in stock and use them according to the state and retail outlet it is being delivered to. For example, one product line might be labelled pak choy, baby buk choy or shanghai buk choy depending on where it is sold.

The confusion also affects consumers. A shopper looking for buk choy doesn't always know if they can substitute pak choy, or if what they really need is a wombok. This reduces willingness to try new products, even with a recipe in hand. national magazines such as the Woman's Weekly may be reluctant to include recipes with Asian vegetables for this reason – after all, what do they call the vegetable?

Consumer concerns over country of origin labelling have added an extra uncertainty. It is not unusual for the question to come up – "*if it is Chinese broccoli, does that mean it comes from China?*". Such doubt is another factor reducing the willingness of consumers to try something new and unfamiliar.

No marketing strategy could be developed without clear resolution of what the vegetables were going to be called. For this reason the first part of the project aimed to gain national agreement on the names of the Asian vegetable lines most likely to gain wider consumer acceptance.

2.2 Method

The first step was to form a steering committee. The committee included representatives from:

- Coles
- Woolworths
- Barden Produce
- Harris Farm Markets
- Sydney Markets Ltd.
- Australian Chinese Growers Association
- AUSVEG
- RIRDC
- NSW Department of Primary Industries

The group had its inaugural meeting in August 2004. Two of the outcomes from this meeting were;

- People in the supply chain should be surveyed to find out what they know about Asian vegetables and what they should be called
- Asian language names were preferred over English names as they helped create an 'exotic' image. As Cantonese is the language spoken by most Asian vegetable growers, this was likely to dominate.

Accordingly, a series of photographs of 13 of the commoner lines of Asian vegetables were printed individually and as a group onto A4 sheets as shown in Fig 2.1. Supply chain members were asked to nominate what they thought each of the vegetables was called as well as what they thought it should be called.

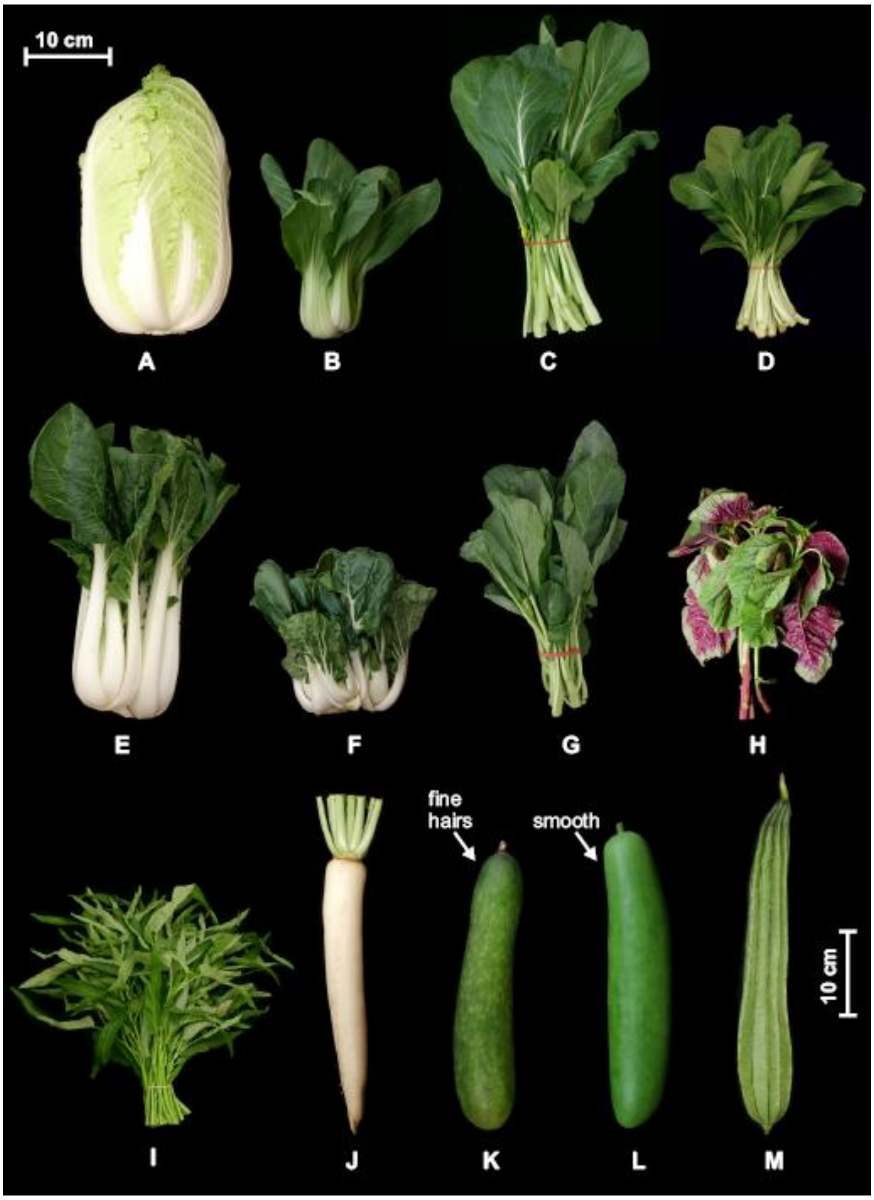


Figure 2.1 - A4 survey form showing 13 popular Asian vegetable lines. Participants were asked what they called each vegetable.

Participation in the survey was encouraged by;

- Direct approach to retail store managers in Sydney, the Central Coast and Newcastle (shown each vegetable as an A4 sized flash card)
- Including the survey in the Asian Foods newsletter, mailed out to over 800 people involved in the Asian food industry
- Publicising the survey through press releases. Articles were published in various regional newspapers (Bega NSW, Waikerie SA, Bairnsdale VIC, Kempsey NSW, Gawler SA, Bathurst NSW, Central Coast NSW) as well as the Weekly Times (VIC), Agriculture Today (NSW), and the Food Media club newsletter.

- Placing an interactive quiz on the NSW DPI external website
- Emailing an interactive form to Asian food supply chain members
- Direct approach to Asian vegetable growers at field days

2.3 Results

A total of 110 forms were received from growers, wholesalers, retailers, food media writers, seed companies and government organisations.

The results were collated and presented to the steering committee in August 2005. At that meeting and over the following weeks, agreement was reached between the major retailers (Coles, Woolworths) and members of the steering committee on 14 names.

The decision process relating to each name is as follows:

2.3.1 "BUK" and "CHOY"

Buk and choy are both used in several names. They mean simply "white" and "vegetable" respectively. Spelling options included "buk" "bok" or "buc" and "choy" or "choi".

A quick search of the International literature indicated that "bok" was a more common spelling than "buk". However, a majority of the survey respondents (43%) spelled "buk" compared to "bok" (34%), with smaller numbers for other spellings. Discussions with Cantonese speakers indicated that "buk" was closer to the actual sound of the word. In addition, 'buk' is currently the more common spelling in Australian retail stores and was strongly preferred by the retail representatives on the committee.

Similar results were gained for "choy" / "choi", the majority of respondents nominating the former spelling. As a result the group agreed on "BUK" and "CHOY".

2.3.2 Vegetable "A"

There was considerable discussion on the name of this vegetable. The majority of respondents referred to this item as a "Chinese cabbage". Moreover, it was suggested that calling a vegetable by an "English" name may help make consumers more comfortable with the product and give them ideas about how to use it.

However, two points against this name were;

- the potential confusion over country of origin labelling – consumers may think "Chinese cabbage" is from China
- the committee previously agreed to go with 'exotic' names where possible as these could have marketing advantages

The next option for naming this was "Wongbuk" or "Wombok". While it was recognised that an ending of "uk" was more consistent with the previously agreed "buk", both of the major supermarkets and Harris Farm Markets preferred the spelling "Wombok". Therefore the decision was for WOMBOK.

2.3.3 Vegetable "B"

Vegetable "B", as the most popular Asian vegetable line, was the most problematic of all. The three main options were:

1. Shanghai buk choy
2. Baby buk choy
3. Pak choy

Option 1. was judged to be unfeasible as the committee had agreed to avoid regional references within the names.

The main argument against option 2 was that vegetable "B" did not really look like a small version of buk choy unlike, for example, vegetable "F".

This left only option 3 – "pak choy", initially the least popular choice. In Cantonese, "pak choy" has the same meaning as "buk choy" (ie. white vegetable); only the spelling is different. Understandably, this raised objections from the Chinese growers – why were two vegetables being called the same thing?

Coles were very much in favour of "pak choy", having recently changed their National system to this spelling (previously it varied between states). They felt that this differentiated the product from white stemmed buk choy, which has different flavour, texture and appearance. After some discussion, Woolworths also agreed to this position.

As a result the committee agreed (extremely reluctantly in some cases) to change to PAK CHOY.

2.3.4 Vegetable "C"

It was unanimously agreed that this was CHOY SUM

2.3.5 Vegetable "D"

Once again, there were three options for this product:

1. Hong Kong choy sum
2. Baby choy sum
3. Flowering choy sum

Once again, option 1 was rejected as being a regional name. It was agreed that, in general, this product should be referred to as BABY CHOY SUM.

Specifications for this product with the major retailers require it to have no flowers. However, some Asian customers feel that the flowering type has better flavour and quality than non-flowering types. This means that there may be an advantage in referring to flowering stems as "flowering choy sum" in some markets. The group agreed that this would also be acceptable in specific situations.

2.3.6 Vegetable "E"

It was unanimously agreed that this was "BUK CHOY"

2.3.7 Vegetable "F"

This vegetable has been successfully marketed in NSW by Harris Farm Markets as "moon buk". While it was recognised that this name had considerable appeal, there was concern with regard to other states (particularly Victoria), where it is already relatively well known as "baby buk choy".

It is also occasionally called "Kantong buk choy" or "Gongmoon buk choy". Both were disallowed as regional references.

In the end it was agreed (although not unanimously) that this small variety would be known as BABY BUK CHOY.

2.3.8 Vegetable "G"

By far the most popular name for this vegetable was "Chinese broccoli". Both of the major retailers currently referred to the product by this name, as did the store managers and approximately half of the other survey respondents. However, this raised the issues of regional names and consistency with the other vegetables for which decisions had already been made.

Other options proposed included kalian, gai lum and gai lan. In the end, it was agreed to move gradually away from Chinese broccoli and replace this with the most popular Cantonese option - GAI LAN. As an interim measure, the product could be referred to as "Gai Lan (Chinese broccoli)".

2.3.9 Vegetable "H"

The three main options for this vegetable were:

1. Amaranth (53%)
2. En choy (or similar) (33%)
3. Chinese spinach (14%)

The committee had previously decided to focus on using 'exotic' names. Amaranth, as the botanical name of the product, was considered to be less 'marketable' than the Cantonese name "en choy". In addition, cultivation of this product is dominated by Cantonese speaking Chinese Australians, who refer to it as en choy. The committee therefore agreed on EN CHOY.

2.3.10 Vegetable "I"

For this product, the three most popular options were:

1. Kang kong (42%)
2. Water spinach / water convolvulus (33%)
3. Ong choy / hung choy (25%)

This product is used throughout South East Asia and especially associated with Vietnamese cuisine. In Vietnam it is known as "Rau Muong". However, the name nominated by the Vietnamese Growers Association, as well as many survey respondents, was "kang kong". Various spellings and pronunciations of "kang kong" are commonly used in the Phillippines, Malaysia, Indonesia, Singapore and Sri Lanka. A quick search using Google indicated this is also the most common name used internationally. It was therefore agreed to call this product KANG KONG.

2.3.11 Vegetable "J"

Once again, this product generated a great deal of discussion of the names (and continues to do so!). The options suggested by the non-retail managers surveyed were:

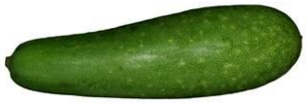
1. White radish (43%)
2. Daikon (36%)
3. Lo bok (or similar) (14%)
4. Chinese radish (7%)

Of the retail store managers, 95% called this product a "white radish". This reflects how it is currently sold in most retail outlets, including Coles, Woolworths and Harris Farm Market.

There is a strong preference among people involved in the food media to call this product a 'daikon'. However, 'daikon' often refers specifically to Japanese varieties, which can be quite different to those grown in China and other parts of Asia. For example, it could be misleading to refer to green shouldered varieties as 'daikons'.

The committee decided that it was not necessary to distinguish between different varieties at this stage given the relatively low penetration of this product into the non-Asian speaking population. The difficulties in persuading a clear majority of retailers to change what they called this product combined with a majority of the popular vote lead to a unanimous decision to call this product WHITE RADISH.

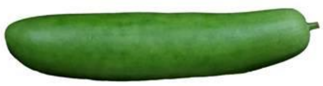
2.3.12 Vegetable "K"



This vegetable sparked a lengthy debate on the suitability of the term 'melon' to refer to Chinese gourds. While this group of products are commonly referred to as melons, this could be confusing for consumers who expect melons to be sweet. The alternatives were gourd, squash, or the Cantonese term for melon "qua" or "gua". Of these, "qua" was judged to be more appealing as well as a more accurate translation from Cantonese.

The majority of survey respondents called this product a "hairy melon". However, this name has negative connotations; Australian consumers are unlikely to be interested in trying "hairy melon"! It was agreed to refer to the vegetable by its Cantonese name, CHI QUA.

2.3.13 Vegetable "L"



Most commonly referred to as "long melon", this it appears that this vegetable is uncommon in China and lacks a name in Cantonese. As this is a hairless, slightly differently shaped variety of 'chi qua', we agreed that it should be named similarly. Suggested were the derivations "cheang qua" (long melon) and tseng qua (green melon). The latter was simplified slightly and the group agreed on SENG QUA.

2.3.14 Vegetable "M"

More than half of the survey respondents called this product a "ridged luffa". Luffa is the botanical name and it is a derivation of this – loofah – which refers to the dried out vascular system of this species used as a backscrubber in the bath.

Once again, the committee felt that "luffa" was not an appealing name from a marketing perspective and that the name should be consistent with the other Chinese gourds. The Cantonese name for this product is "sin qua", meaning "silk gourd". It was agreed to call the vegetable a SIN QUA.

2.3.15 Vegetable "N"

This product was left off the original survey but is commercially significant and could become more so. It is commonly known as "Chinese mustard" or "gai choy". The group agreed on the latter name ; GAI CHOY. Smaller varieties (potentially used in salads) could be called BABY GAI CHOY.

2.4 Implementing the name changes

2.4.1 Launching the Names

Having reached National agreement on 14 names for the commoner Asian vegetables we decided the system should be officially "launched" in an event particularly targeting the food and news media. This was not only an opportunity to publicise the names, but also to raise the profile of Asian vegetables as a category.

The launch occurred on November 7th, 2005 (Fig 2.2). With the assistance of food writer and chef Carol Selva Rajah, over 100 media, government representatives and industry members were invited to the November 7th launch. The day comprised of;

- Food media representatives collected in a bus from Central Station
- A visit to the Harris Farm vegetable farm at Kemps Creek, featuring talks on different Asian vegetables by Minnie Cai (grower) and Harriet Harris (Harris Farm Market)
- The official launch by the NSW Minister for Primary Industries, The Hon. Mr Ian MacDonald, followed by a short speech by Charmaine Solomon. This was conducted in the Mall in Cabramatta
- A guided walkabout around the Cabramatta shops conducted by Carol Selva Rajah and Dr Vong Nguyen.
- Lunch and speeches at a local Vietnamese restaurant (including a speech by Lyndey Milan, Food Editor for Australian Consolidated press and presenter of "Fresh" TV show on Channel 9). The lunch featured a variety of Asian vegetable dishes such as kang kong with garlic and chilli.
- Presentation of gift bags to all participants. These contained fresh Asian vegetables and herbs, noodles, Ayam brand sauces, water chestnuts and an "information pack".

The information packs were sent to people unable to attend as well as those present at the launch. They contained a range of information and resources including:

- A4 sheet with pictures of the vegetables and their new names (Fig 2.2)
- Six A4 "Fact sheets" on different Asian vegetables, with background information, alternative names, description of where and how they are grown, preparation and cooking instructions and some nutritional information
- An A4 "Fact sheet" on peri-urban agriculture in the Sydney Basin
- A CD with useful photos of Asian vegetables
- Recipes for two Asian vegetable dishes featuring pictures of the vegetables

The event attracted considerable media attention with over 30 known and significant media 'hits' on outlets as diverse as 'Fresh' TV show, Womens Weekly magazine, Radio National and the Sydney Morning Herald.

It was concluded that the cost of staging the launch was more than compensated for by the publicity it generated. Moreover, it proved an effective way of reaching some of Australia's "opinion leaders" – the food media – and encouraging them to use the standardised name system when writing about these products.

(a)

(b)

(c)

Figure 2.2 - Launching the names of Asian vegetables. (a) – Minnie Cai (L) and Harriet Harris giving a talk on different vegetables at the farm, (b) – Gerard McEvilly, program manager from Horticulture Australia, (c) – Minister for Primary industries the Hon. Mr Ian MacDonald and author Charmaine Solomon at the official ceremony at Cabramatta, (d) – Ms Lyndey Milan (ACP) speaking about Asian vegetables during lunch in Cabramatta

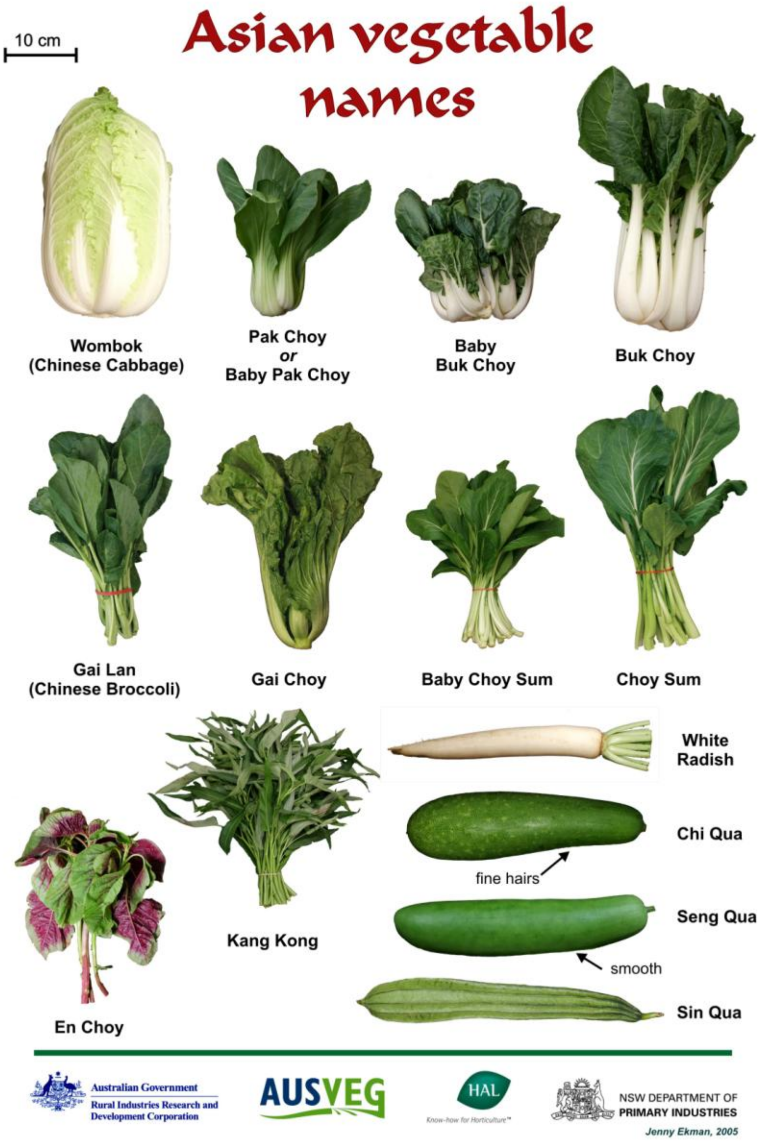


Figure 2.2 - A4 sheet with pictures of Asian vegetables and their agreed on names, distributed at and following the launch of the National naming system for Asian vegetables.

2.4.2 Follow up actions

It was never expected that the names used for Asian vegetables were going to change overnight. Initial resistance from some supply chain members combined with packers wanting to use pre-printed labelling has meant that some of the changes have occurred slowly if at all. However, Coles and Woolworths now label most – if not all – Asian vegetables consistently. Certainly the major product lines are far more uniform between states and stores than previously. It is hoped that this will eventually encourage other organisations to follow suit.

In addition, the Australian Chamber of Fruit and Vegetable industries – the peak body for the fresh produce wholesale markets around Australia – now uses the standard names on its 'FreshSpecs'. These product specifications are intended to be used by the whole fresh produce industry. Product that does not comply with these specifications may be rejected. One such criteria is the name on the label; product which is not labelled according to our standardised system could, in theory at least, be rejected by wholesalers.

To further encourage use of the standard names, an A1 poster was produced featuring pictures and basic information on 19 Asian vegetables. The poster is waterproof and UV resistant and designed to be used in packing sheds as well as retail stores.

Coles are distributing a copy of the poster to each of their stores around Australia (approx 720). It will be mounted in the setup / cold store area at the back of each store to help educate their staff about Asian vegetables.

The poster has been distributed widely to wholesalers in Sydney and Brisbane as well as retail outlets and seed companies around Australia. So far it has proven very popular. It is hoped that this will further encourage use of the standardised naming system.

2.5 Key Messages

- Coles, Woolworths and other Asian vegetable supply chain members have agreed on names for some of the commoner Asian vegetable lines.
- These names have been promoted in the media, initially as part of a "launch" and subsequently by use in industry related publications and specifications
- A1 size posters with pictures of the vegetables, their names and basic information are available for all those involved in the Asian vegetable supply chain
- The project has made some significant improvements in consistency of nomenclature for Asian vegetables. However, it may take several years for these changes to be fully implemented.

3. Asian Vegetables at Retail – the current situation

3.1 Aim

One of the pieces of information necessary before formulating a marketing strategy was to understand the current situation as regards retail of Asian vegetables. This was one of the issues identified by the steering committee, referred to in Chapter 2 of this report.

We wanted to know how much retail store managers knew about Asian vegetables, what the quality and availability was like in stores and how this category compared to other vegetables in terms of size and value.

3.2 Method

Seventy fresh produce store managers located in Sydney, the Central coast and Newcastle were surveyed about Asian vegetables. Supermarkets and independent retailers were selected to reflect their approximate numbers Nationally. That is, approximately 50-60% of fresh produce is sold through the two major retailers, of which Woolworths has a slightly larger market share than Coles. In our survey the numbers of stores studied were:

Woolworths – 19
Coles – 17
Independent – 33

Stores were also chosen from a range of different demographics, ranging from country stores to those in the inner city, and from up-market stores in wealthy areas to blue-collar suburban stores.

As well as being asked what they called a range of relatively common Asian vegetables (see Chapter 2), each store manager was asked a series of questions aimed at finding out how much they knew about the products. They were additionally questioned with respect to volume, freshness, and ways of promoting these products.

Following the interview, the assessor evaluated the range, quality and price of Asian vegetables available in the store. Twelve products were used as ‘indicators’; buk choy, pak choy, wombok, gai lan, choy sum, kang kong, sin qua, fu qua, chi qua, seng qua, snake beans and white radish. Quality was graded from 0 (very poor) to 4 (excellent, fresh).

To support data gained from looking at Asian vegetables in retail stores, we were fortunate to be provided with sales data for vegetables by Harris Farm Markets (HFM). This data indicates sales volume for these products for each of the various HFM stores around Sydney and Newcastle. Weekly sales figures for the period from July 2004 to mid January 2005 are included. This data was analysed to gain an insight into the value of this product category.

It is acknowledged that this study was limited by the relatively small number of stores examined in only 3 regions of one State. Also, although both the examiners who conducted store interviews were trained to evaluate Asian vegetables, grading was subjective and constrained by being conducted in the store itself. Nevertheless, the results highlight some key considerations for future marketing of Asian vegetables.

3.3 Results

3.3.1 How do you think most of your customers use Asian vegetables?

By far the most popular answer to this question was "stir fry" (88%). A few managers (7%) also mentioned steaming. This answer possibly indicates how the managers themselves might use the vegetables rather than real understanding of customer needs.

Many store managers did not seem to know about the many varied uses of Asian vegetables. In fact, at one point the assessor heard a customer asking whether buk choy could be added to vegetable soup. The customer was told:

"No, it's not for soup, you normally stir fry buk choy."

Consumers with an Asian background often nominate "adding to soup" as an important way of using these products. They might also use them in salads, steamed, added to curry, stuffed with savoury filling and baked or, in addition, stir fried with meat or fish.

3.3.2 What are your top selling Asian vegetables?

In almost all cases, pak choy was said to be the top seller, followed by Wombok. Pak choy alone was said to account for anywhere from ⅓ to ½ of all Asian vegetables. Pak choy and Wombok together made up 50-90% of Asian vegetable sales. Although these two vegetables are still the biggest selling lines overall, more recent discussions have indicated that this may be changing as products such as choy sum and gai lan become more popular.

The whole Asian vegetable category still represents a very minor grouping for most stores, being only 1-2% (by $ value) of all vegetable sales. Nearly two-thirds of the store managers who nominated the quantity of pak choy they sold said they required 3 cartons or less per week.

It is interesting to compare this result with actual sales data from HFM. Even in this chain of stores, which has an active interest in Asian vegetables, the category still represents only 2.6% (by $ value) of all vegetable sales. To put this into perspective, this means that the pak choy sales are slightly more than one third of the value of celery as a product line. Sales of all Asian vegetables combined are worth less than sales of French beans and half that of mushrooms!

To some extent this is a consequence of the low value of these vegetables. Most leafy lines sold for 33c – 99c per bunch. Pak choy was consistently 66c per bunch. In general, average prices of Asian vegetables were much lower than similar Western style vegetables (Table 3.1). As a result, although the $ value of pak choy was only 76% that of English spinach, 33% greater volume was sold.

Table 3.1 - Average prices of different vegetables at HFM stores between July 2004 – January 2005. Prices calculated from total $ returns combined with number of units sold.

Asian vegetable		**Western vegetable**	
Product	*$ value at retail*	*Product*	*$ value at retail*
Choy sum	$0.57 / bunch	English spinach	$1.34 / bunch
Buk choy	$0.55 / bunch	Silverbeet	$1.13 / bunch
Gai lan	$0.95 / bunch	Broccolini	$2.48 / bunch
Baby gai choy	$0.88 / bunch	Watercress	$1.12 / bunch
Wombok	$2.28 each	Cabbage	$2.93 each
Chi qua	$3.66 / kg	Choko	$3.40 / kg
Sin qua	$17.94 / carton	Zucchini	$33.72 / carton
White radish	$19.45 / carton	Red radish	$51.16 / carton

As for retail stores in general, pak choy is the biggest seller at HFM, followed by Wombok (Fig 3.1). However, the wider range of Asian vegetables generally stocked in HFM stores is reflected in the data. Choy sum, gai lan, buk choy and even kang kong sell in relatively significant quantities. Total choy sum sales are not far behind those of pak choy.

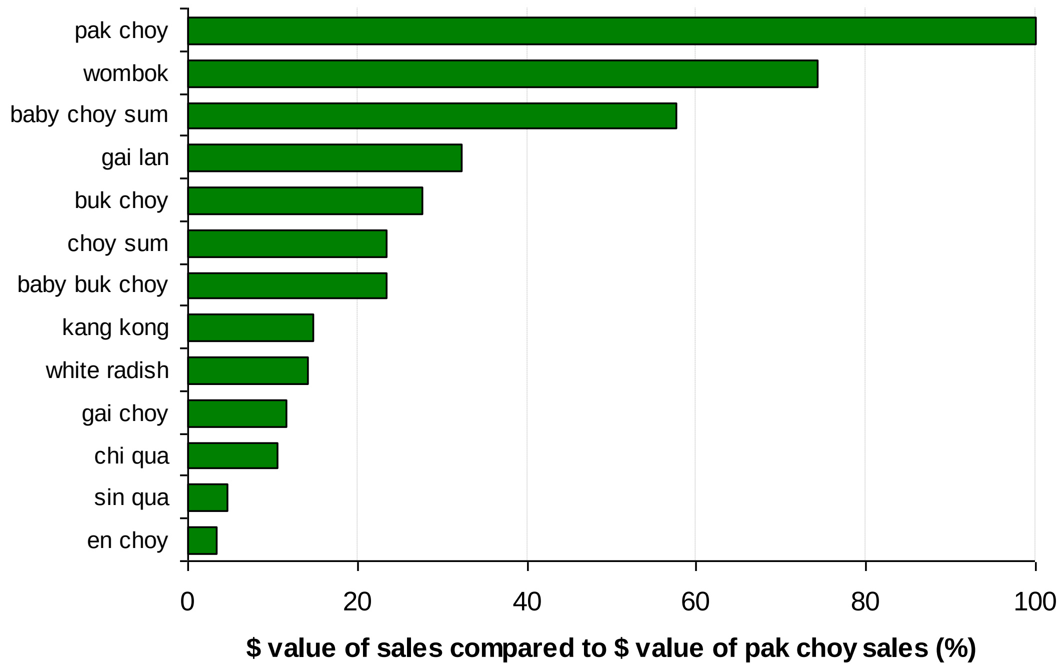


Figure 3.1 - Harris Farm Market retail stores sales of various Asian vegetable product lines relative to sales of pak choy.

It is interesting to note that a study reported by the Produce Marketing Association (PMA) in the USA (2005) reports quite different top selling Asian vegetable lines. In order, these were;

- baby buk choy (pak choy?)
- fu qua (bitter melon)
- buk choy,
- daikon (Japanese white radish)
- enoki mushrooms
- gai lan
- galangal
- ginger
- Japanese cucumber
- lemongrass
- lo bok (Chinese white radish)
- snake beans
- wombok.

Unfortunately, fu qua sales were not included in the HFM data and the importance of this product line in Australia is unclear. Nevertheless, the differences between Australia and the USA are significant. The USA appears to have less variety and lower importance of leafy vegetables, wombok is far less important overall while spices and exotic mushrooms make up a larger proportion of the total.

One reason for this may be that referring to people as having an "Asian" background fails to consider the many different cultures and backgrounds within this large group. Asians make up approximately3% of the American population, of whom 23% are from China. The next largest groups are Filipinos, Indians and Vietnamese being 18%, 17% and 12% respectively.

In comparison, 11.7% of the Australian population has Asian ancestry and nearly 40% of this group identified as Chinese (ABS, 2007). Approximately 10% of Australians have Vietnamese ancestry. The dominance of the Chinese heritage among Australian - Asians is also reflected amongst growers of Asian vegetables; Chinese – Australian growers are the largest ethnic group nationally, followed by growers with Vietnamese heritage. Perhaps as a result, vegetables which are used extensively in Chinese cuisine dominate the Asian vegetable category in Australia.

Demand for Asian vegetables not only has a strong consumer base in Australia but is relatively constant during the year. Analysis of the data provided by HFM indicates that sales of Asian vegetables fluctuate very little. In contrast, sales volumes of vegetables such as broccoli and cherry tomatoes vary seasonally (Fig 3.2).

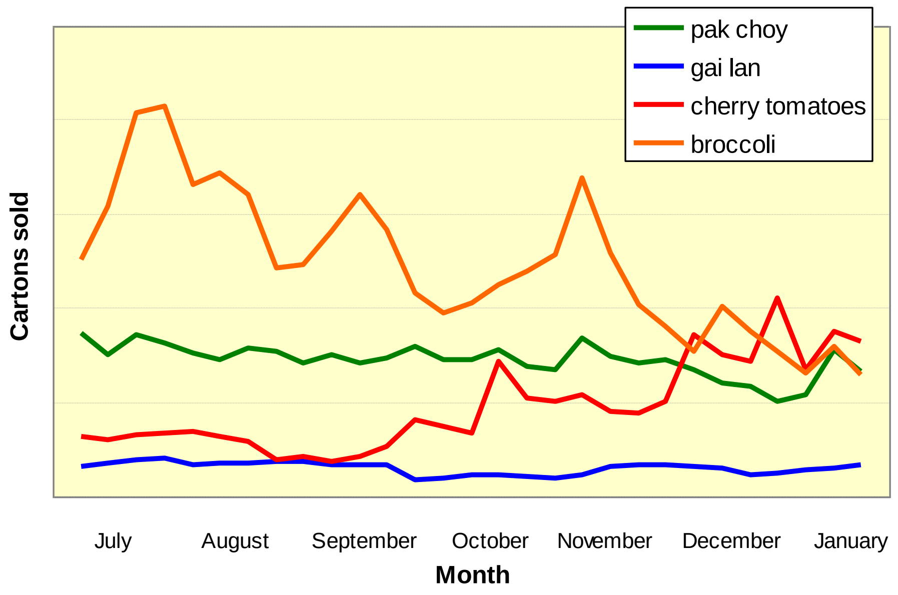


Figure 3.2 - Retail sales (cartons or bunches) of various vegetables by Harris Farm Markets over a 7 month period. Lines indicate combined totals from 16 stores.

Part of the seasonal variation in sales is likely to be due to changes in price; the average price of broccoli increased from $1.69/kg in July to $5.14/kg in January. However, it is likely that a significant portion of the demand for vegetables is price – inelastic. For example, sales of cherry tomatoes nearly tripled between July and the end of December. However, the price per punnet remained around $2.48.

Prices paid for leafy Asian vegetable lines also did not vary significantly during the period examined. This suggests that buyers consider these regular purchases rather than products associated with specific seasons. One exception is chi qua, which sold in larger quantities during winter (Fig 3.3). However, as with cherry tomatoes, demand appears to be relatively independent from price. This suggests that there is low price elasticity for this product, so a moderate increase in price would be unlikely to significantly reduce demand.

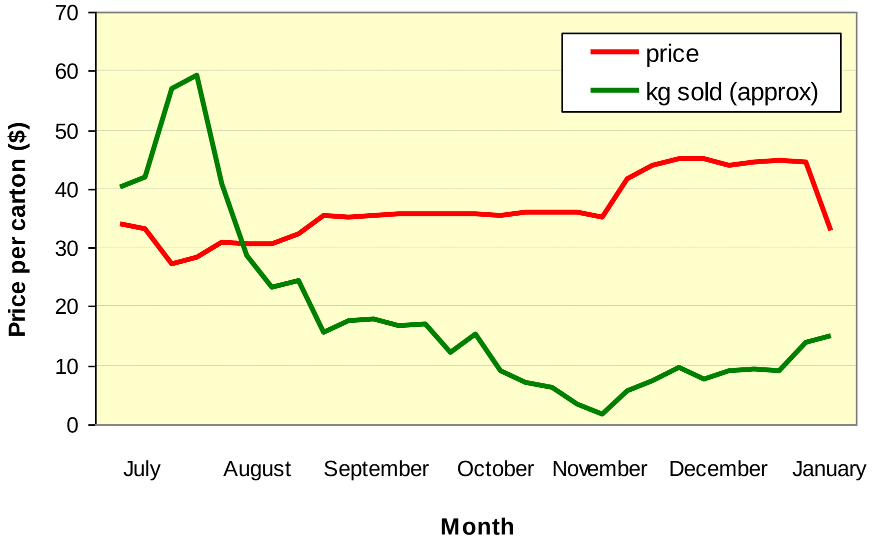


Figure 3.3 - Changes in estimated volume of chi qua sold and price at retail by Harris Farm Markets over a 7 month period. Lines indicate combined totals from 12 Sydney stores

3.3.3 Do your customers often ask about Asian vegetables?

Most retail store managers (77%) said they were asked about Asian vegetables only rarely. Only 13% said they might be asked about them several times during a normal week, the remainder being even less often.

This result seems surprising given that our other experiences during the project indicated that consumers were keen to know more about these products and responded extremely positively when information was provided. Possibly it would have been useful to also ask store managers how often they are asked questions about produce in general!

3.3.4 How often do you get fresh deliveries of Asian vegetables?

Most retail stores have daily deliveries of vegetables, and this was reflected in the answers given:

Daily	62%
Two / three times weekly	13%
Weekly	20%

This probably overestimates the frequency of delivery of Asian vegetables – after all, they make up an extremely small percentage of sales. If a retailer only requires 2-3 cartons of pak choy (the most popular line) per week, it would be reasonable to expect that the product is delivered 2/3 times per week at the most. If this is correct then many Asian vegetables will have been stored for several days before being placed on display – which is likely to reduce quality overall.

Harris Farm Markets, which has a larger turnover of these lines, does have daily or only slightly less frequent deliveries of Asian vegetables. For at least some locations, Asian vegetables are picked early in the morning in western Sydney and delivered directly to the store by around 10:00a.m. Such products are likely to look much fresher and more attractive than those stored for several days under less than ideal conditions.

3.3.5 What would help you to increase sales of Asian vegetables?

This question aimed to discover store managers perceptions of what was needed to better promote Asian vegetables. In some cases, managers made more than one suggestion. Their comments may be summarised as follows:

	Percentage nominating
Provide recipes	46
In-store demonstrations	23
Improved displays / better packaging	13
Improve quality	12
Point of sale information	10
Cheaper prices / special offers	10

Providing recipes was clearly the method of increasing sales preferred by store managers and/or believed by them to have the most chance of success. There was also strong interest in in-store cooking demonstrations and taste testing. This is not surprising, given that tastings can provide an added attraction to the store in general! While tastings such may be effective, they are relatively expensive.

More than a third of the respondents felt that using packaging which provides information or retains quality, putting up point of sale materials (such as posters) and improving the display overall could also be effective. This suggests that they feel the category currently doesn't look as it good as it could. The interest in point of sale materials also adds weight to the already strong 'vote' for more information including recipes.

It is interesting to note that 10% of the managers suggested that reducing prices would increase sales. This seems surprising, given that Asian vegetables are already some of the cheapest products available. In addition, as already discussed, the available data suggests that demand for many products is likely to be relatively unaffected by price.

However, 'Special Offers' such as packaging with 30% extra at no cost, 3 bunches for the price of 2 and so on could potentially generate additional sales by attracting attention to products consumers may not usually buy. Offering such 'special deals' has the added benefit of helping to maintain a constant price during periods of excess production. This is one of the methods of increasing total sales favoured by the larger retail chains.

3.3.6 Evaluation of Range, Quality and Price at retail

As well as surveying the knowledge of the store manager, the assessor conducted a quick evaluation of the range, quality and price of Asian vegetables available in the store from a list of 12 products. None of the stores had all 12 items available, although a number had 10 or 11. Availability of various products in the 68 stores surveyed is as follows:

Product	*# stores with stock*
Pak choy	67
Wombok	52
Buk choy	48
Choy sum	45
Gai lan	25
White radish	20
Snake beans	12
Fu qua	8
Chi qua	8
Sin qua	7
Seng qua	6
Kang kong	4

There was a correlation (r=0.69) between the number of products available in each store and the number of Asian vegetables which each store manager had been able to name from the flash cards (Chapter 2).

In general, more Asian vegetable lines were available in Sydney stores than in stores on the Central Coast or Newcastle. There were also differences according to the type of store. While some independent grocers had excellent ranges and product quality, on average they stocked fewer products and had poorer quality than the major retail chains.

There was no relationship between price and quality for any of the products examined (Fig 3.4). A consumer could pay the same for a product which was graded 1 (poor) as for product graded 4 (excellent, fresh). This gives a mixed message to consumers, who may be willing to pay more for good quality product but are certain to be put off by poor quality product at a relatively high price. This is especially likely if they have previously seen good quality product available at a low price.

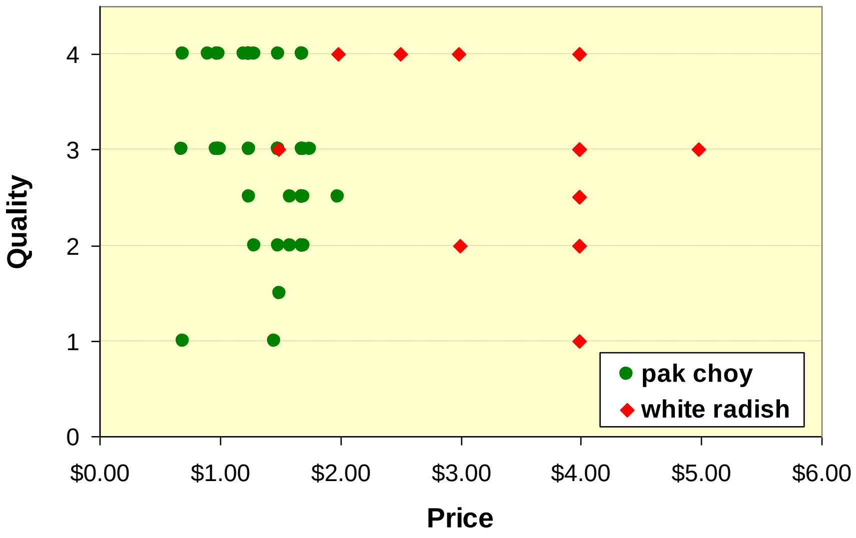


Figure 3.4 - Price and quality of pak choy and white radish surveyed at retail stores in Sydney, Newcastle and the Central Coast. Prices are per bunch (pak choy) or per kg (white radish). Quality graded from 0 (very poor) to 4 (excellent, fresh).

Prices were often lowest and quality best in locations known to have a large Asian population. Stores which were further from Sydney and had little local Asian population tended to have fewer product lines, smaller quantities available, higher prices and lower quality. This was particularly noted with independent stores, which may have greater difficulty sourcing product as well as a smaller market for Asian vegetables.

3.4 Discussion

The 'visibility' of Asian vegetables makes it easy to forget that they are still an extremely small category within the vegetable industry. However, the sales data from Harris Farm Markets suggests that offering a good range of freshly picked, good quality product at an inexpensive price <u>can</u> increase sales. Moreover, it seems likely that moderate increases in prices would not reduce sales – especially if good quality product is offered.

The lack of connection between price and quality at retail is not a situation unique to Asian vegetables. Every year early season fruit attract lower prices than their mid-season counterparts, even though the latter is often superior in appearance and flavour. However, whereas fruit prices are likely to be determined (in part) by supply and demand, this relationship is less clearly defined for Asian vegetables. Although supply is likely to vary seasonally, retail prices seem to vary more between stores than they do over time.

While price is unlikely to be the most important driver affecting Asian vegetable purchases, consumers who have seen fresh, excellent quality pak choy for 65c / bunch will feel they are being 'ripped off' if offered a lower standard for $2.50. This could act as a significant deterrent to sales. Improving the consistency of product at retail could benefit the industry in the longer term.

3.5 Key Messages

- Most store managers had limited familiarity with Asian vegetables and would probably be unable to answer customers questions about these products correctly
- Nearly half of store managers surveyed suggested providing recipes as a way to increase demand for Asian vegetables
- Asian vegetable sales are dominated by pak choy and Wombok, although this may be changing as products such as choy sum become more popular
- Asian vegetables as a category are usually less than 2% of vegetable sales by value. This is partly due to the low prices paid for the products, which are generally much cheaper than more familiar vegetables
- Available sales data suggests that demand for most Asian vegetable lines is stable throughout the year and relatively unaffected by price.
- Low turnover at most stores means that many products are likely to be stored for a day or more before sale, which could negatively affect quality
- Price at retail was unrelated to quality of the products on display
- Product range and quality at independent retailers was highly variable and, on average, lower than at the major retailers

4. Promoting Asian Vegetables

4.1 Aim

One promotional method used by other food producers is to take advantage of the many food and wine fairs, restaurant expos, agricultural shows and other events where there are opportunities to show and talk about the product to people already interested in what we eat.

During the project, an opportunity arose to put up a display on Asian vegetables as part of the NSW DPI stand at the Sydney Royal Easter Show. To reserve space at the Show would normally cost several thousand dollars. This was therefore an ideal opportunity to not only test one method of promoting the products with minimal expense but also survey people visiting the display on their knowledge of and attitudes to Asian vegetables.

Another promotional tactic that was tested was conducting in-store taste testing. When combined with providing recipe cards, this was the method of increasing Asian vegetable consumption favoured by store managers. As at the show, this was not only an opportunity to test a promotional method, but also to talk to consumers and gain valuable insights into what they thought about these products.

4.2 Method

4.2.1 Easter Show setup

A range of leafy Asian vegetables were grown from seed and seedling in the greenhouses at Gosford Horticultural Institute. A number of other, more robust vegetables were purchased immediately before the event. Plant tags were prepared with basic information on each vegetable, as the examples shown in Fig. 4.1.

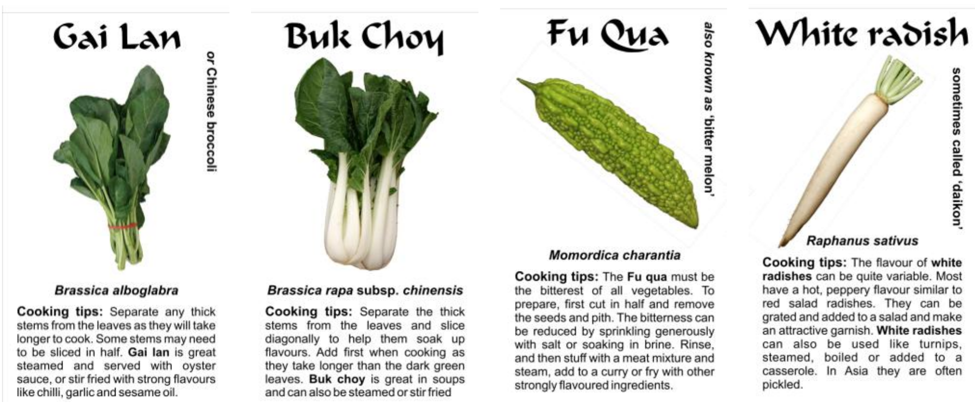


Figure 4.1 - Plant tags for Asian vegetables

A short video was made showing how to cook 3 extremely simple Asian vegetable dishes – kang kong stir fried with garlic and chilli, gai lan in oyster sauce and char grilled chi qua. The video was filmed at home using a Sony PD170 video camera with NSW DPI technical officer (and ex-chef) David Daniels as "Guest chef". The edited 5 minute video was programmed to loop continuously.

A questionnaire was prepared along with a number of laminated A4 sheets with pictures of the 14 Asian vegetables with standardised names. Basic demographic information was requested from each respondent which included name, age group, gender and language spoken at home. Participants were asked how many of the vegetables on the laminated sheet they recognised, as well as questioned on their Asian vegetable purchasing habits and sources of information used for new recipes. A copy of the questionnaire is included as Appendix 1.

Finally, a simple handout was printed with some basic information on Asian vegetables.

Once at the show, the leafy vegetables were planted into a mini "garden" filled with potting mix and topped with bagasse mulch. The remaining hard vegetables were arranged on shorter display boxes around the 'garden', with information tags attached. A computer monitor was installed behind the garden which continuously played the cooking video. Signs were displayed offering people a chance to win a copy of Carol Selva Rajah's book on Asian cuisine if they completed a survey form. The complete display is pictured in Fig 4.2.

Figure 4.2 - Easter show Asian vegetable display

4.2.2   In-store taste testing.

For this part of the project we arranged to work with A. Clouet Pty. Ltd., trading as Ayam. The company specialises in Asian style sauces, noodles, pastes and other Asian ingredients. As Asian sauces are an essential part of many Asian vegetable dishes, this seemed to be a natural fusion. Moreover, this reduced the cost and meant that we could use Ayam's equipment and experienced demonstrators.

Our first step was to develop a series of four recipe cards featuring selected Asian vegetables and Ayam products. The aim was to make the recipes as simple as possible. The cards were designed to be bright and colourful with a little information about the vegetable as well as the recipe. We also pictured the ingredients instead of just listing them to make it easy to see what was needed to make each dish (Fig 4.3).

Figure 4.3 - Recipe cards prepared featuring Asian vegetables and Ayam sauces. The back of the card for Kang kong with BBQ prawns is included to show how ingredients were pictured, making it easy for shoppers to see the ingredients required.

A series of 14 cooking demonstrations / taste testing sessions were held in Harris Farm Market stores, IGA supermarkets and one independent grocer around Sydney and on the NSW Central Coast. They were held on Thursday evenings and Saturday during the middle of the day (peak shopping times).

With the exception of the Central Coast store the dishes were prepared in a wok by Ayam's experienced demonstrators, all of whom were of Asian origin. The demonstration at Erina on the Central Coast was contracted to a company specialising in this field. On this occasion an electric frypan was used and the demonstrator was a lady of Anglo-saxon appearance.

At the cooking demonstrations shoppers could see how to make one of the four recipes, taste a sample and take away recipe cards with the instructions for each of the four dishes. This also provided an opportunity to chat with shoppers and observe how they reacted to the different vegetables.

Sales data for the days of the demonstration as well as the same day in the previous week were requested. Unfortunately only sales data from the day itself was provided. As the usual sales of these products of these products at the demonstration times were unknown we were unable to quantify the effect on sales. As a result the demonstrations were discontinued.

In addition, the original experimental plan was to compare the effectiveness of an in-store demonstrator with that of installing a screen playing cooking videos. This technique is used in the USA, whereby a short video showing how to prepare and cook a particular item is shown on a continuous loop next to where the food is being sold. We therefore developed a short video showing preparation of the four sample recipes. This was filmed and edited professionally and made into a DVD (Fig 4.4).

Figure 4.4 - Filming an Asian vegetable cooking video showing how to make the four simple recipes featured on recipe cards.

However, we encountered significant difficulties with installing the video in stores – issues with power supply, presence of water, security and space all made this difficult to negotiate with individual store managers. This part of the research was therefore discontinued.

4.3 Results

4.3.1 Easter Show display and questionnaire

The results of this activity were quite extraordinary. An estimated 40-50,000 people visited the NSW DPI stand and most looked at the Asian vegetable display.

A number of factors were effective at encouraging people to look at the display;

- Having the video running caught the eyes and ears of people walking by who would otherwise not have stopped. The recipes were short enough that they could watch one or two before becoming distracted and moving on.
- The living, growing plants looked colourful and attractive, standing out in a hall area which mainly contained manufactured foods.
- The book– although not an expensive prize - was a significant lure for some, who were keen to enter the competition

A total of 851 visitors took the time to fill in the survey. Naturally, this survey does not represent a random sample of the population being primarily;

- Sydney residents
- People interested in food (as the stand was located inside the "Fresh Food Dome")
- People interested enough in Asian vegetables and/or gardening to stop and look at the display
- People keen to win a prize!

The results are also likely to have been affected by participants tending to answer what they thought we wanted to hear – positive comments about Asian vegetables!

Nonetheless, the survey yielded some interesting results. Of the 851 participants, 92 identified as having some Asian language skills / heritage. Perhaps unsurprisingly, this group was much more familiar with the vegetables. On average, non-Asian Australians said they recognised 7 of the 14 vegetables pictured, compared to 13 out of 14 for the Asian language speakers. Perhaps more significantly, the most frequent response was only 5 vegetables for non-Asian background participants compared to all 14 for the Asian language speakers (Fig 4.5).

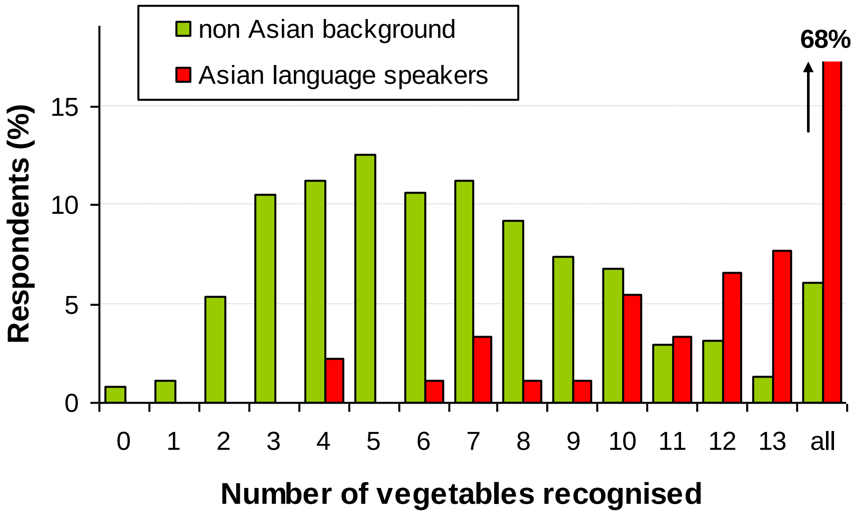


Figure 4.5 - Number of Asian vegetables recognised from a card showing 14 types. The height of the bar indicates the percentage or respondents from Asian speaking or non-Asian speaking backgrounds who recognised that many vegetables.

Nearly all of the Asian language speakers said they purchased Asian vegetables weekly, while 52% of the remainder also said they bought the products that frequently (Fig 4.6). Only 5% of survey participants said that they never purchased Asian vegetables. Given the known sales data for Asian vegetables these figures are extremely high. This suggests bias in the sample population as well as significant overstatement of purchases by the participants.

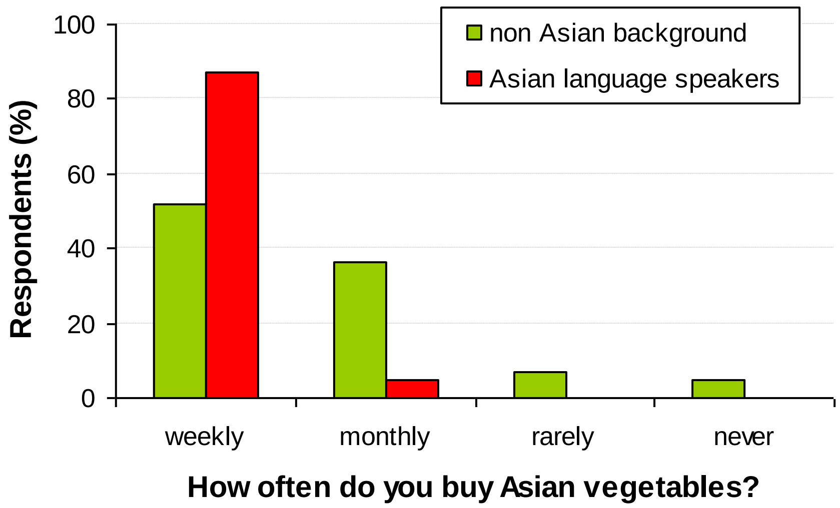


Figure 4.6 - Stated frequency of purchase of Asian vegetables.

Participants were then asked to think about the last time they purchased an Asian vegetable and what made them decide to buy it. Most people nominated several reasons. What stands out in this result is the strong emphasis on healthiness – it was the most popular reason given among non-Asian participants and second only to "regular purchase" among Asian language speakers (Table 4.1). This suggests that Asian vegetables have a very strongly positive image as being "Healthy".

Table 4.1 - Responses to the question – "What made you decide to buy one of these vegetables? (Participants could choose multiple answers.)

	Respondents nominating each reason (%)	
	Non-Asian background	*Asian language speakers*
Regular purchase	35	77
Healthy	47	62
Cheap / good value	27	38
Need for specific recipe	39	17
Impulse buy	14	10
Saw on TV / in magazine	4	1
Try something different	13	1

Not many people volunteered that they were influenced to buy Asian vegetables by the media. However, many said they purchased the vegetables in order to make a particular recipe or prepare a specific meal.

This result is consistent with results for the last two questions, which sought to find out what sources of information people used when cooking new dishes. The answers indicated that people were more likely to make a recipe from one of their own cook books than from something they had seen on TV or read in a magazine (Table 4.2). In addition, slightly more than half of the respondents had bought something after taste testing it in a shop. For these questions, the responses of Asian language speakers were similar to those of the wider group.

Table 4.2 - Answers to the questions "In the last year, have you made a particular dish after seeing the recipe on TV or reading about it in a magazine?" and "In the last year, have you used recipes from cooking books you have at home?".

	Respondents nominating frequency or otherwise (%)	
	Made a recipe from TV or a magazine?	*Made a recipe from a cook book?*
Yes, weekly / regularly	21	42
Yes, occasionally	35	33
A couple of times	21	14
Never / maybe once	18	8
Not sure	5	3

Participants were asked what type of Asian vegetable they bought the last time they did so. Unfortunately, some interpreted this as asking what types they bought in general and nominated a large number of different items. However, others nominated only one vegetable, skewing the data.

Sales data indicates that the most popular Asian vegetable lines are wombok and pak choy closely followed by choy sum. For example, Harris Farm Markets sells 2 bunches of pak choy for every bunch of buk choy or baby buk choy (discussed further in chapter 4). However, survey respondents most frequently nominated that they purchased buk choy (Fig 4.7).

One reason for this result may be people referring to several different types of Asian vegetables as "buk choy". Another reason may be that this is simply the first type of Asian vegetable that comes to mind when people are asked to name one.

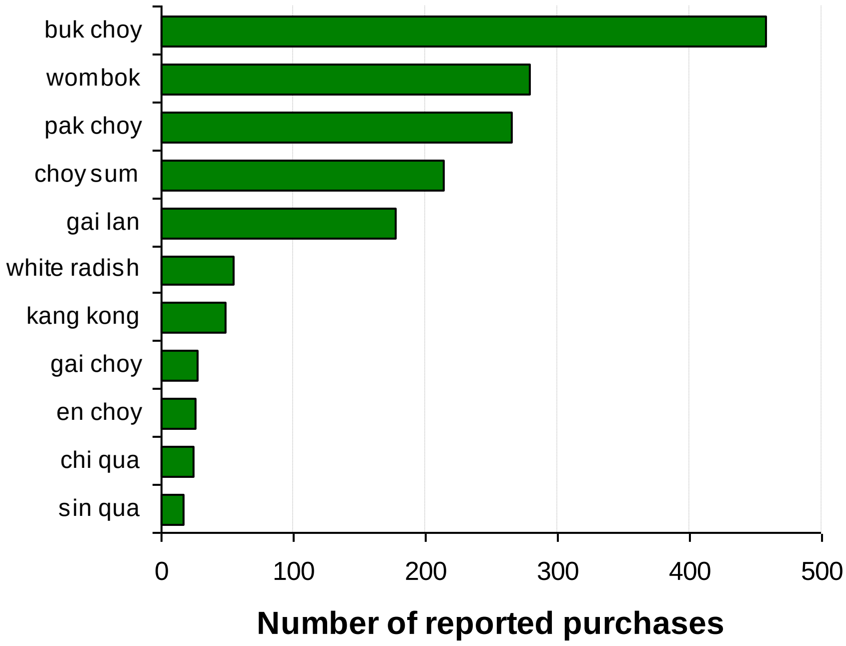


Figure 4.7 - Responses to the question "last time you purchased an Asian vegetable, what sort did you buy?". Length of each bar indicates the frequency of the response.

4.3.2 In-store cooking demonstrations and taste testing

In most cases, there was a very strong level of interest from shoppers in the Asian vegetables being prepared. During cooking the aroma of garlic, soy and sesame wafted around the shop and was a major enticement.

Many consumers were very attracted by seeing the products cooked. That they were able to not only taste the dish but take away the instructions to make it themselves triggered a very positive response. It is unfortunate that the effects on sales are not known, although one store did sell out of the vegetables being demonstrated on the day. Shoppers commented that;

"I always wondered what to do with that…"

"I never knew they were so easy to cook!

That's really tasty!

The level of interest varied between stores, although some of this effect may have been simply due to the location where the demonstrator could set up – next to the vegetables or in an out of the way corner. The most interest appeared to be in stores in more affluent areas which had a diverse, less conservative clientele.

For example, according to the manager at Harris Farm Bondi Junction the store has a significant Jewish customer base. Combined with a cramped setting for the demonstration, this may account for the lower level of interest in trying Asian vegetables experienced at that location.

In contrast, shoppers at the Harris Farm store at Penrith showed a very high level of interest. People were queuing to try the dishes and happily carrying away vegetables and recipe cards. In fact, at the request of the store manager, we repeated this demonstration some weeks later.

Another store, in Parramatta, the reaction was intermediate between these examples. In this case many of the shoppers were of Asian origin. They had little interest in trying the dishes as they already purchased the vegetables anyway.

The Ayam demonstrators were extremely good at encouraging people to taste the products. They were friendly, approachable and chatty and could add information about the products from their own experience and familiarity with them (Fig 4.8).

Figure 4.8 - Pictures from the in-store cooking demonstrations. These show the cramped position Rosi was allocated in the Bondi Junction store (a) compared to the ideal position Lee was given in front of the vegetables at Harris Farm Penrith (b, c).

As noted in the methods, the cooking demonstration at Erina fair on the Central Coast was conducted by a middle aged, Anglo-Saxon lady. She had not cooked Asian vegetables before and arrived with an electric frying pan rather than a wok. Unfamiliar with the products and hesitant in her cooking style, she was unable to generate the level of shopper interest shown at most other stores. The lack of an "authentic" or perhaps "exotic" feel to the demonstration also may have had a strong negative effect.

One of the messages that came through strongly and was commented on by the demonstrators themselves was the strong positive reaction people had when told this was a vegetable industry / government initiative:

> "When we do our normal (Ayam) shows we never get this good a reaction. People love finding out how to cook the vegetables"

There was a clear positive emotional response to “doing something to help the farmers”. People see growers as part of a community they want to support, as opposed to a commercial business simply there to make money. The response was enhanced when they were told they were locally grown, right there in the Sydney Basin. This information gave them a feeling of connection with where their food came from – it was no longer a completely unknown product but something linked (however tenuously) with their own life.

Lot’s of people volunteered how much they liked eating vegetables, that they knew they were good for them, and that they wanted to eat more. Presenting them with dishes which could be cooked quickly and easily, tasted good, and only resulted in washing up a wok was very positively recieved.

4.4 Discussion

4.4.1 The Easter Show

Using the Sydney Royal Easter Show as a venue to promote Asian vegetables appeared to be an effective method of reaching a large number of consumers. Moreover, people visiting the display were likely to have an existing interest in food, cooking and fresh produce, so could perhaps be persuaded to try new products – arguably an ideal target market for the Asian vegetable industry.

There are many similar events which could also be useful venues for such promotional activities. These include not only agricultural shows in major regional centres but also food expo’s such as Restaurant 07 and Fine Food Australia (targeted at the food service industry) and the Good Food and Wine Show.

Although the data from survey are somewhat dubious, this in itself is a result. Previous research has shown that people consistently over-report consumption and liking of products associated with desirable behaviour, especially if they are perceived as healthy (Koster, 2003). One study found that when people were asked about their purchases of a snack marketed as ‘Healthy’, they estimated twice as many purchases as they actually made. However, when the same product was marketed simply as ‘New’, people reported their purchases quite accurately (Koster et al, 1987).

It seems likely that any survey of consumers about Asian vegetables will greatly overestimate actual purchases and consumption. Eating vegetables in general is seen as socially desirable, and many people will over-report their consumption. For example, a survey of people known to have low consumption of vegetables found that 45% of them felt that they actually consumed more than an average person (Cox *et al*., 1996).

In this survey participants reported extremely high rates of consumption of Asian vegetables. However, sales data supplied by Harris Farm Markets suggests that Asian vegetables represent around 2% of total vegetable sales by value - even though they are a retail group which places a priority on quality and range of these products!

The “healthy” image of Asian vegetables is certainly something that can be used to advantage in any marketing strategy. It is also evident that ‘buk choy’ is the most instantly recognisable of these products, or at least the first Asian vegetable that comes to mind when consumers are asked to name one. It may be possible to capitalise on these features in any future marketing strategy.

4.4.2 In-store demonstrations

The second part of this research, the in-store demonstrations, appeared to be effective at reaching consumers and positively influencing them towards Asian vegetables. However, this research highlighted a number of considerations. Running such demonstrations is relatively expensive so a number of measures should be taken to ensure effectiveness;

- Demonstrators must be familiar with the vegetables and able to talk a little about them
- Demonstrators need to have friendly, outgoing personalities
- It is essential to find a suitable location in the store, preferably close to the vegetables
- All of the products (vegetables and sauces) should be readily available close by the demonstration
- Stores should be selected which have appropriate demographics

In addition to the direct costs, there was a considerable amount of work in simply organising the demonstrations – arranging the event with store managers, setting it up, making sure products were in stock and the demonstrator knew where to go, etc. Then we encountered difficulty in getting the sales data which would show whether the demonstrations had been effective or not. As previously noted, the second part of this experiment – where we had planned to set up a video playing a cooking demonstration in the store – was abandoned due to issues such as these.

Although consumers certainly seemed to enjoy the cooking demonstrations, the cost effectiveness of this activity within any future marketing program would need to be carefully monitored and considered.

4.5 Key Messages

- Asian vegetables are consistently seen as 'healthy'. While this is likely to lead to over-reporting of purchases and consumption by consumers, it also provides a ready tool for marketing and promotion.
- There is a high recognition of "buk choy" compared to other Asian vegetables.
- Consumers may be more likely to make something new using a cookbook than TV or magazines.
- Events which are food / agriculture related can be used to provide information on Asian vegetables to large numbers of consumers.
- Such events may be especially cost effective as they attract consumers already interested in food – a promising target market for unfamiliar Asian vegetables.
- In-store cooking demonstrations were generally well received by shoppers especially in less conservative, middle class / upper middle class areas.
- Consumers liked the idea of "doing something for the farmers" and reacted positively when told the vegetables were locally produced.
- Cooking demonstrations were most effective when the demonstrator was familiar with the products, confident and outgoing and where there was space to set up the demonstration in a suitable location.
- In-store demonstrations are labour and time intensive, so their cost effectiveness should be carefully monitored in any future marketing campaign.

5. Qualitative Consumer Research

This part of the project focussed on finding accurate information on consumer attitudes to Asian vegetables. This involved both qualitative research using focus groups and quantitative data collection using an online survey company (Chapter 6). The consumer research was co-ordinated by Mr Richard deVos, who has specific expertise and experience in this field.

5.1 Aim

It was evident that, in order to develop an effective marketing strategy for Asian vegetables, we needed to understand consumer knowledge, attitudes and practices. These related to vegetables in general as well as the specific category of Asian vegetables.

5.2 Method

Six focus group discussions were conducted in two dedicated research facilities in Sydney. One facility was located on the North Shore – a reasonably expensive area with a high proportion of professionals and retirees – and the other was at Parramatta in Sydney's western suburbs – a less expensive area whose residents are predominantly office and factory workers and tradespeople. Around 8-10 participants were recruited for each session, none of whom appeared to be from an Asian background.

Discussion by the groups was professionally facilitated by Mr Richard deVos and the proceedings recorded.

Each group comprised women who had nominated that they were the main shopper for their household with regular responsibility for preparing meals. The groups were structured as follows;

- Lower-middle class; married or living with a partner; under 30 years.
  No children.
- Lower-middle class; married or living with a partner; 30-55 years.
  No children.
- Lower-middle class; with 2 or more school-age children under 15 years.
- Upper-middle class; married or living with a partner; under 30 years.
  No children.
- Upper-middle class; married or living with a partner; 30-55 years.
  No children.
- Upper-middle class; with 2 or more school-age children under 15 years.

Group participants were not told beforehand what the discussion would be about. Richard led each group through a structured discussion which initially focussed on shopping habits and food preparation in general, leading into fruit and vegetable shopping specifically, and finally raising the issue of Asian vegetables. At this point they were given pictures of Asian vegetables to look at. They were then provided with samples of the products to touch, feel, cut and smell and finally given a number of recipe cards to examine and discuss. The sequence of questioning is shown in Appendix 2.

5.3 Results

5.3.1 Who shops and how often?

Virtually all the participants said they were the main fruit and vegetable purchaser in their household. However, most of those in the two 'upper-middle class' qualitative groups without children (i.e. under 30 and 30-55) spoke of their partner's involvement in food shopping.

This was much less the case among any of the groups in the 'lower-middle class' groups. Several complained of their partner's refusal to help with shopping.

Most participants in the groups said that they tried to do one weekly shop for fruit and vegetables. Many also said they usually had to top-up their weekly shop and/or purchase particular things for certain planned (say entertaining) meals.

5.3.2 Who prepares the meals?

Meal preparation can be a role, responsibility, pleasure or burden.

> "I have to do it. I'm the one"
>
> "If I left it to him, we'd just have take-away every night"
>
> "I don't mind it, if I have the time"

All respondents in the focus groups where participants had children said that the primary role of meal decision and preparation was theirs alone. It feels a burden sometimes and is always a responsibility (to make sure there's a meal on the table and to ensure the children are eating healthily). They did talk about it occasionally being a pleasure and that they occasionally enjoyed the creativity of it, but only occasionally.

For the group of lower-middle class younger women without children, the situation was the same. All were the meal planner and preparer, with the exception of two who said their partners cooked the meat (one sometimes and the other, always). They too saw it as a chore and drew little satisfaction from it.

> "My partner hates shopping and he never cooks either"

The upper-middle class younger women (no children) were different. Each spoke of their partners' involvement in meal planning and preparation (to a greater or lesser extent) and the concept of sharing the task was well established.

> "We both work. Sometimes he's home first or I'm more tired, so he'll do dinner. It's shared"

Group members were particularly asked about what they liked about meal preparation:

- Feeling of nurturing and caring for their family
- Creativity (occasionally).
- Pride, particularly when creating a special meal (which is appreciated) for the family or when entertaining

When asked what they most disliked about cooking/meal preparation, many mentioned the cleaning up afterwards. Some, although not all, said that at least was a chore they shared with their partner.

5.3.3 What influences what you cook?

Time, time, time!

For virtually all, except those who were not working, time (or the lack of it) is a huge factor.

"With all the kids' activities, I just don't have the time to do much. It has to be fast and easy".

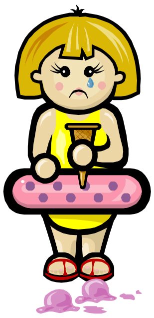
"We both work. We both get home late. It's just what we can do in the time"

"Sometimes it just has to be whatever I can find in the fridge"

"I always cook extra so I can put meals in the freezer"

Children & partner

The other big influence is what the family will eat.



"I'm not going to do something if the kids might not like it and I have to throw it out"

"We are on a tight budget. We just can't afford to do something different and then maybe throw it out"

"My kids are so picky about vegetables. I have to disguise them in the meal"

"I'll only cook what he likes"

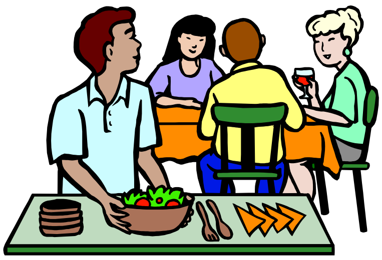
"I have to practically hide the vegetables under the meat to get him to eat them"

Mealtimes with many children seems fraught and getting them to eat vegetables even more so. Mothers are just not keen to risk the wastage and having to prepare a second, (more acceptable) meal.

There were a few occasions where children's influence worked in a positive sense though.

"Sometimes they come home from a friends place and say they had such-and-such a dish and liked it – and I try to do that again. It's something new I know they will like"

Occasion



Entertaining is an influence.

"My friends all know about my strawberry gateau and they always ask for it when they come to dinner".

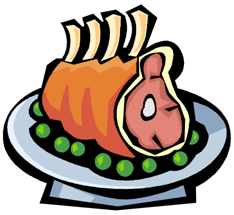
Many people are much more likely to make the effort to make something new and challenging when having guests for dinner.

Meat

Meat is a key driver

> "I just look in the freezer and see what's there and then decide what veggies to have with it"
>
> "For us, the meat is important. Then what veggies go with it"

Respondents in the groups were virtually unanimous in the view that the decision about what vegetables to have with a meal is dictated primarily by what meat is to be served. It is never the other way round. This is the case for normal family dining as well as special meals/entertaining. Vegetables are the accompaniment. The only exception may be when doing a stir-fry – and even then most talked about it being a stir fry of meat and veggies (and generally "normal" vegetables like carrot, onion and broccoli at that.



This has interesting implications for the Vegetable industry's marketing strategy of positioning vegetables 'centre of the plate' (and seeking to move emphasis away from meat as the meal foundation). More research is warranted here as, from this limited study, such a strategy would be pushing against strongly-held perceptions and endeavouring to change well-established consumer behaviour.

5.3.4 How often do you shop for fruit and vegetables?

Most participants said they shopped once a week, with occasional top-ups between times. However, there were a significant number of women who shopped more often, particularly in the upper-middle demographic group. To these people quality and freshness was a priority, so they would shop several times during the week. One lady, who also volunteered that she loved cooking, said she purchased fruit and vegetables almost every day and shopped around for the best quality.

5.3.5 Why do you shop for fruit and vegetables where you do?

Convenience:

The convenience aspect was the most important driver for many participants, especially those with children.

> "It's just such a rush with the kids and our activities. It's easy to be able to park the car and do the whole thing, so long as you're prepared to wait in the (checkout) line"
>
> "It's just me and my partner and we both work. So I try to do it all at once at the supermarket"
>
> "I have to buy my vegies at the supermarket – unfortunately"

Being able to compare produce:

Some members talked of the importance of comparing what was available from their regular supermarket with what is on offer at the fruit and vegetable store. They highlighted price and quality as the primary factor. However it is clear that this process of comparison is only possible when it is practical. That is, when the preferred fruit and vegetable outlet is close to the supermarket or otherwise accessible.

"I always have a look that the fruiterer downstairs under the supermarket first. Then I can compare with the supermarket while I am in there. If it's better downstairs I go there on the way back to the car"

"There's a Harris Farm close to where I work and that's great for topping up and to compare with the supermarket"

Quality, or lack of it:

The quality of produce available was also extremely important, especially if needs for convenience are met. Poor quality produce to them equals:

- Wasted money, through product thrown out.
- Difficulty encouraging their children to eat and enjoy fruit and vegetables
- Wasted time, in having to go back and purchase again
- Loss of face/pride, when a meal is not as they had planned/hoped

Many said they were willing to pay more for good quality product – if only they could find it. There's a close emotional connection to shopping for fruit and vegetables. It can be a sensory, enjoyable and creative experience. If matched with a satisfactory eating experience or cooking outcome, personal pride and the emotional attachment are enhanced. However, all that is destroyed (and is hard to rebuild) when the quality of the produce is poor. It has a profound impact on the shoppers' perception of the particular produce and the retail outlet concerned.

Virtually every person in the qualitative groups spoke of dissatisfaction with the quality of fruit and vegetables purchased from supermarkets. This was a strongly held view and many had specific examples they were keen to tell.

They talked of:

- Produce not lasting long enough.
- Disappointing experiences with pre-packed produce such as Mushrooms, Strawberries, Lettuce and Tomatoes.
- Produce sometimes not looking fresh and appetising

"It just never lasts"

"There's always one or two rotten in the container.

"I bought a Rockmelon and then had to throw it out the day after"

"I bought that lettuce in the bag and the leaves were brown at the edges. It was more expensive and a waste. I had to throw it out"

By contrast, members of the groups said they considered the produce available from fruit and vegetable stores to be better quality and a much less risk of disappointment. In the groups, specific positive mention was made by some (and agreed by others) of the quality and range available through Harris Farm Markets.

"When I have time, I much prefer to shop at Harris Farm – it's better quality and cheaper"

This perception of poor quality fruit and vegetables being made available through supermarkets, the dominant supply channel, is a very significant issue and deserves more research and analysis at a national vegetable industry level.

In an effort to better understand what the group members meant by quality we asked them to try to describe it. They used terms like:

"Bright", "Fresh", "Perky", "Green", "Crisp"

They talked animatedly about the importance of appearance, smell and feel.

Conversely, when asked to discuss what poor quality was to them, they talked of:

"Limp", "Browning", "Smells off", "Fruit flies", "A dirty/messy shop",
"Too ripe", "No smell", "Messy display"

Range

Group participants were similarly of the view that independent fruiterers carried a wider range of produce. They said that if preparing a particular, different dish (say for a dinner party) that required a vegetable or fruit they do not normally purchase, they would go to a fruit and vegetable shop. This was both because they felt the outlet more likely to carry unusual items, but also because they could be more assured of the quality (as mentioned above).

> "They always seem to have a better range. If I'm cooking something special, I'll go there to get it"

This is interesting in view of the previous survey of retail stores which found that, in general and with notable exceptions, both quality and range of Asian vegetables was ***lower*** in the independent stores than in the major retailers.

Advice

Of less importance, but still mentioned unprompted in each group, was the feeling that shoppers could get better advice and assistance from an independent fruit and vegetable outlet.

"You just can't ask someone in the supermarket. They're all teenagers"

Again, the survey of retail store managers had indicated that customers rarely asked them questions about Asian vegetables. Perhaps consumers like to feel they *could* ask for help, even if they rarely act on this.

Price

Interestingly (given the ongoing publicity about fruit and vegetable prices), price did not appear to be a particular issue in relation to fruit and vegetable shopping. It was true that all group members said they had a 'barrier' beyond which they would not purchase certain produce, but by and large, there was no strong complaint about current prices. Fruit and vegetables are considered to be important and valuable purchases. Price is therefore not a major issue, at least up to a point. This sentiment appeared to be the case across all groups, but perhaps a little less so among the younger, lower-middle class group who tended to purchase to a stricter budget.

Shoppers said they are pragmatic about purchases, taking advantages of specials and making substitutions where necessary.

An important finding from the qualitative groups, that warrants more research and quantification, was the widely held view that supermarket produce prices are higher than fruit and vegetable stores. This was independently raised in each group and generally agreed.

> "I know I'm paying more there (at the supermarket) but it's the convenience"

5.3.6 How do you choose what to buy?

Group participants said they were prompted to buy a familiar vegetable as an unplanned purchase by factors such as specials, seasonality, appearance and tasting in store:

> "Its good value and I know the kids will like it"
>
> "I see it there and remember and think that would be tasty"
>
> "It's there and I'm hungry and it looks delicious"
>
> "At my store they chase you round with samples and I can't resist"

Something new tonight?

Increasing the consumption of Asian vegetables depends mainly on attracting new consumers. The groups were asked to talk about the things which stimulate them to purchase a new fruit or vegetable, planned or unplanned.

Sometimes simply the cooks' own boredom with the usual will influence a change in the normal menu pattern.

> "I get so sick of the same things; I have to try something new"

The recommendation of friends or family was another strong factor.

> "If we're out to dinner and we have something different that's nice I'll always ask for the recipe"
>
> "There's this girl at work and she brings the most delicious things in for lunch. If I like the smell she gives me the recipe".

The point here is that a significant element of risk (of failure or disappointment or wastage) is removed.

Some group members talked about seeing a dish on a TV program (such as 'Ready, Steady Cook', 'Fresh', the Foxtel cooking channel or 'Jamie Oliver'); or recipes in magazines, as being a driver to try something new. Many linked this with the accompanying driver of entertaining family or friends (see below).

Like the media influences, recipe cards were highlighted as a driver of new meal preparation. Most respondents reported having cooked something new from a recipe card picked up at a retailer (primarily fruit and vegetable store or butcher). They like the temptation of the picture and the ability to be able to (generally) buy what they need, or the key ingredient, then and there. Several group members said they have a collection of their tried and favourite recipe cards.

Entertaining doesn't just affect what people choose to cook, it is a major factor stimulating them to make something different. Having family or friends around often seemed to be the 'excuse' to try something different or new.

> "When you have people over you don't want to do the same normal things. You want to do something different. Something they'll like"

However many talked of minimising any risk by having a test-run beforehand to be sure they liked it and the result turned-out as hoped.

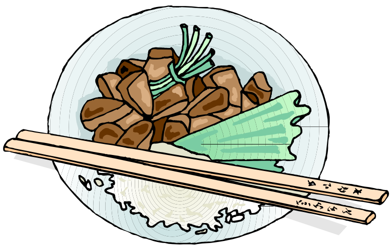
Despite this, it is important to remember that any new vegetable purchase is a risk (and could have social/family implications) so a fair degree of confidence-building and reassurance is required. Multiple drivers will have best effect.

5.3.7 Asian vegetables – What are they?

After generally covering food shopping and meal preparation, the discussion was turned to the topic of Asian Vegetables.

Groups were asked what they thought was meant by the description '*Asian Vegetables*'. There was an almost universal lack of detailed awareness. In each group all participants were aware of "Buk Choy" and some said they had purchased it. Other vegetables they considered to be in the Asian Vegetables group were:

- Wombok (virtually always described as "Chinese Cabbage")
- Baby/Mini Corn
- Shiitake Mushrooms
- Ginger
- Sugar Snap Peas



"Bok Choy, that's the only one I know"

"Stir-fries, Asian vegetables are whatever you put in stir-fries"

"Chinese Cabbage. You know, the one you use to make that crunchy noodle salad"

Each group was then shown the NSW DPI-produced Asian Vegetables A4 sheet with pictures and the name of each product. This stimulated some limited further recognition.

"Gee, they're strange. I've not seen most of these. Maybe some at the top of the page, but certainly not the ones at the bottom".

"I've seen this wombok, the buk choy and choy sum, but never any of these other ones"

"I've seen this 'sin qua' thing before but had no idea what it was. Is it a fruit? Do you peel it?"

In short, at this stage in the discussion there was a considerable lack of awareness, little engagement and some degree of rejection due to unfamiliarity. There was very little interest or enthusiasm, particularly among the lower socio-demographic group.

5.3.8 Who eats Asian vegetables?

Discussion turned to who would be purchasing them and the common view was;

> "Asian people".

> "Asians. They know what they are and what to do with them"

Asked if they thought dishes they might purchase from an Asian/Chinese restaurant would contain these vegetables, there was a mix of views:

> "Yes, probably some of these, but I don't know what I'm eating there. You couldn't pick them out"

> "No, they just have lots of carrot and onion and snow peas and things like that"

Another view expressed by a few in the (with children) groups was that Asian vegetables would appeal to those not trying to please a family palate. An interesting and perhaps astute marketing insight.

> "It's young couples without kids that would buy them"

But the overwhelming sentiment from all the groups (at this stage in the discussion) was one of hesitation and 'not for me'.

> "I'd just have no idea what to do with them"

> "How would I cook them?"

> "What would it taste like?"

> "I wouldn't buy them. I don't know how to cook them and I don't know if the family would like them"

5.3.9 Where can you buy these vegetables?

Supermarkets were not seen as the logical place for purchase (see later note under Characteristics/Qualities). Rather, independent fruit and vegetable stores are considered a more likely outlet and, even more appropriate are those catering particularly to Asian customers or located in areas of high Asian population.

> "You see some of these in the supermarket, but not all of them"

> "Oh yes, I've seen some of these in my fruit and vegetable shop, but I wouldn't know what to do with them"

> "They have all these in Harris Farm Markets"

> "There's an Asian shop near my work and they have all of these"

5.3.10 Who has tried Asian vegetables?

Probably about half of the group participants said that they had purchased Buk Choy at some time in the past. The only cooking method mentioned was stir-frying. Many said that they had purchased Chinese Cabbage (Wombok), mainly for a popular crunchy noodle salad recipe. A few had bought Baby Corn which they self-classified as an Asian Vegetable, though it was not clear if this was canned or fresh.

5.3.11 Where have you seen them for sale?

Respondents were asked about retailing of Asian Vegetables. After discussion, a fairly common feeling in the groups was that supermarkets were not the best places to purchase Asian Vegetables.

- Group members talked about the chains' inability to properly care for fruit and vegetables (as highlighted in the earlier quality discussion).
- They also expressed concern about the time taken to transport fruit and vegetables through the supermarkets distribution system and the impact this may have on the freshness and appearance of Asian Vegetables

Conversely, fruit and vegetable shops were considered a better and more trusted outlet for Asian Vegetables. There was a feeling that they would be fresher (closer to production or shorter distribution chain perhaps); and that the fruiterer would know more about and better care for Asian Vegetables.

Group members thought the most appropriate outlet for Asian Vegetables would be the specialist Asian food and vegetable outlets, though only one person in the 6 groups said that they occasionally purchased from such an outlet. Others either had no easy access to such stores or felt they were 'unfamiliar territory'.

5.3.12 What were they like?

Group members were asked what they thought about the Asian Vegetables they had seen for sale.

Green & Healthy

There were very positive comments about their 'greenness' and therefore health/nutrition.

> "They're all so green. They must be good for you"

All of the groups commented, without prompting, that Asian vegetables were very healthy. They saw them as sources of important vitamins, part of a good diet. This is consistent with the results of the previous survey, for which health was often stated to be a primary driver for purchase.

Freshness and Presentation

As with all fruit and vegetables, good presentation at retail is important. The discussion indicated that this was particularly the case for Asian Vegetables.

> "They can look really nice, if they're all fresh and green "

The freshness of their appearance at retail level can be a strong plus. A few people mentioned that there seemed to be a high turnover of Asian Vegetables (in Harris Farm stores), suggesting that fresh product came in every-day. This is seen as a strong advantage.

> "They always look so nice in the shop:"

Local

In one group, there was quite some discussion about where Asian Vegetables are grown. It was agreed that they must be grown closer to the city (than other vegetables, like carrots) as they seemed to always look fresh and were perceived to have a shorter 'shelf life'. This too was seen as an advantage.

Cheap

Every group talked about the relative cheapness of Asian Vegetables and highlighted this as a plus.

> "They're so cheap; I'd buy them if I knew what to do with them"
>
> "You see three bunches for a few dollars. That's really good"

Overall, perceptions of the qualities of Asian Vegetables were moderately to very positive. Other than their unfamiliarity, no negative characteristics were mentioned.

Still, a familiarity barrier

While respondents said they saw Asian Vegetables where they shop, the almost universal feeling was that they are for someone else.

> "I see them there, but I don't buy them. They're for the people who know what they are; how to cook them".

5.3.13 What about <u>these</u> Asian vegetables?

In the last part of the group discussion, a selection of fresh Asian Vegetables were placed on the table for participants to touch, feel, cut and taste.

The reactions of the different groups were truly revealing. In all groups but one, there was some degree of initial hesitation, with the participants needing to be encouraged to take the vegetables out of the shopping bags and pass them around.

Initial reactions

Two groups, the 'lower-middle class younger women without children' and the 'lower-middle class women with school-age children' were hesitant and remained so during the session.

> "Well I recognise that one; it's Buk Choy, but not any of the others"
>
> "Ergh! This one's got hairs on it!"
>
> "This looks like grass"
>
> "We don't have to eat them do we?"

In contrast, one group, the 'upper-middle class younger women without children' were immediately excited, animated and inquiring.

> "Wow"
>
> "Oh my gosh"
>
> "They're so fresh . . . look great"

They passed them round, smelled them, called for a knife and board to cut them open and even tasted a few, raw. They were engaged. At the end of the session they were told they could take the vegetables and some recipe cards home and were keen to do so. There was even a small dispute over who should get what.

Freshness

We had tried hard to provide the groups with fresh, good-looking produce and it was obviously appreciated.

> "They look so fresh"
>
> "They're lovely and green"
>
> "Smell fresh. Look clean"

Yet with one evening group, the vegetables were not as fresh (they had been purchased in the morning and left unrefrigerated all day, and it was obvious).

> "These are dry and yellowy. I wouldn't buy that"
>
> "They're limp and not fresh looking"

Remaining questions

While looking at the vegetables, feeling them and passing them around, many of the group were asking each other questions. There was an obvious desire to find out more information – just looking at the samples was not enough to break down existing barriers.

> "What do you do? Do you peel it?
>
> "Is it like a cucumber or a squash?"
>
> "What meat would it go with?"
>
> "What would you do with this big thing?"
>
> "I need a recipe…."
>
> "I still can't imagine what it tastes like"
>
> "I'd want to taste it cooked before I bought one"

5.3.14 Marketing ideas – Recipe cards

Group discussion finally dealt with a number of possible marketing ideas and strategies.

Group participants were handed samples of recipe cards produced by both Sydney Markets and NSW DPI. Immediately, their resistance to purchasing Asian Vegetables began to dissolve. They could see the vegetables in a real dish; see what was required to make the dish and read how to do it. The recipe cards made cooking with an Asian Vegetable much more attractive and possible.

The NSW DPI recipe cards had a number of features the group members liked

- Explaining what the (unfamiliar) vegetable tasted like was considered a real plus and assists in stimulating the purchase.
- Including pictures of the sauces and other ingredients required, rather than just a list.

  "This makes it really easy to see what else I have to get, even without my reading glasses"
- Nutritional information, as provided for Gai Lan. This reinforced their own perceptions of the 'healthy' nature of Asian Vegetables. Group members asked why this information was not provided for the other featured vegetables.
- Saying how the dish could be served and/or with what type of meat answered an earlier expressed hesitation.

On the negative side, the NSW DPI cards were felt to be a bit flimsy and would not stand up well to multiple use. Paper stock that was more card-like and coated is preferred.

The Sydney Markets cards were felt by some to be a bit complicated and difficult, especially given that they were unfamiliar with the key vegetable itself. A number of participants commented that they felt these were aimed more at skilled cooks than at everyday meal preparers such as themselves. There was definitely a strong preference for simple recipes over more complex ones.

5.3.15 Marketing ideas – In store

Any marketing program must have a strong in-store component. It is here that interest can be really stimulated (look, smell, taste) and the final decision will be made. The group participants discussed the factors that will ensure maximum retail impact.

Quality/Fresh

There was strong agreement that the vegetables must be fresh, inviting and 'perky'. Produce presentation is critical!

Location

A number of group participants felt that Asian Vegetables are sometimes a bit out-of-the-way in the store. They suggested that, if a special push is to be undertaken, the store could be asked to move them (or the ones featured) to a more prominent location.

Recipe Cards and Point of Sale

Recipe cards, related directly to the vegetables featured were the most popular marketing idea. It was felt that they should be displayed right alongside the vegetable, rather than somewhere else in the store.

Make it Easy

A number of women commented that the absolutely ideal situation would be to have the sauces required available for sale right alongside the vegetables.

> "Have the sauces right there with them. If I have to go off looking for the sauce somewhere else in the store, or in another store, I probably won't do it"

Let me try

Taste-testing is a tried and true marketing tactic. If the featured dish can be taste-tested (maybe at peak trade times) it will go a long way to stimulating purchase. Group members were asked if they have ever bought a food (including fruit and vegetable), unplanned, but after an in-store tasting. Almost all said they had.

> "Yes, it works for me. It's good to know what it tastes like"

> "Yes, particularly if it smells nice – and I'm hungry"

Many of the groups said that they would be much more likely to try the vegetables if they could taste them first. Taste testing would overcome one of the major barriers to purchase.

5.3.16 Marketing ideas - Media

Groups were asked about the power and influence of media coverage and media/cooking personalities. They could talk quite knowledgeably about different programs (e.g. Fresh, Better Home and Gardens, Ready Steady Cook, The Cook and the Chef); and personalities (such as Jamie Oliver, Huey and Kylie Kwong).

They did not strongly feel that utilising these TV programs is an essential part of getting more people eating Asian Vegetables, though they did feel that it may help stimulate interest. When asked to specifically suggest a personality that would be a good ambassador, there was agreement on Kylie Kwong. She is seen to be young, innovative, aspirational and not doing dishes that are too complicated. Her Asian heritage was seen as a real plus, giving her recommendations added credibility.

5.4 Discussion

The focus groups highlighted some widely diverging views about Asian vegetables. Some of the participants were very negative about the products – they had no interest in trying them or finding out more about them. In contrast, others were interested, curious, had already tried some products and were keen to experiment with others. Although in some cases a 'group think' seemed to develop whereby participants tended to align with the views of others in the group, their responses appeared to be mostly genuine. In this they differed from previous face to face discussions, where consumers may have said what they thought the interviewer wanted to hear.

One of the most surprising things to come out of the focus group discussions was the depth of negative feelings about supermarkets. While most of the participants said they shopped at supermarkets because they offered greater convenience, many commented that they would avoid going there if they had the time. Conversely, independent fruit and vegetable shops were seen as having better quality as well as cheaper prices. Many expressed the view that they are where you go when you want to buy something 'different', need advice or are looking for extra good quality.

This is particularly interesting given the results detailed in the previous chapters of this report. They have shown that independent retailers are not more likely to be able to offer good advice on Asian vegetables than store managers in the major chains. Supermarkets usually stock a larger range of Asian vegetables and often have better quality than the independents – yet consumer perception is the opposite.

As a result, although supermarkets represent the major shopping destination for fruit and vegetables, they may not be the most appropriate outlets for a concerted marketing drive to stimulate trial of Asian vegetables by new purchasers. Working with independent retailers could appear more 'credible' in the eyes of consumers, especially given that it is in the independent stores that they would expect to buy these products.

Stimulating the purchase of a new product is not easy. It will require a well thought out marketing strategy and probably multiple stimuli to be effective. Unfamiliarity with Asian vegetables is the most significant barrier to purchase. However, in most other respects Asian vegetables are viewed very positively by consumers. They see them as fresh and healthy, attributes which could be used in a marketing campaign. Many consumers are eager to know more about these products and are likely to respond positively to information provided in a suitable format, particularly those in certain demographic groups.

While there are opportunities to tap into the positive emotional attributes related to meal choice and preparation, it is important to avoid triggering the negatives – such as time limitation, risk of dissatisfaction and children's dislike. It is very important to have clear, easily understood information available to avert these issues. Educating the retail store's staff so that they are ready to answer questions and become enthusiastic promoters of these products is essential to achieving this objective.

One factor which may be either a positive or negative is calling the category "Asian vegetables". On one hand this makes them appear special and exotic. On the other this can lead to a perception that they are only for "Asian people", not for the general population. It may be more effective to market these products as "exotic vegetables" to overcome this barrier to increased consumption. However further research is needed to determine this.

5.5 Key Messages

- Shopping for food is still usually the role, responsibility and often burden of the woman of the household.
- Most people said they shopped at supermarkets, primarily because they were convenient.
- However, many participants expressed a strong preference for independent grocers (especially Harris Farm Markets), who were perceived as having a wider range, better quality and cheaper prices than supermarkets.
- The primary drivers for a planned purchase of a new or different (to normal) vegetable are:
    - Entertaining and the preparation of a special dish or meal.
    - Recipe recommendation from a friend/family (perhaps after trying).
    - A desire to give the family/their partner something new for a change.
    - Bored themselves with the 'same-old'.
- Drivers for an unplanned vegetable purchase include:
    - Enticing display
    - Taste test in store
    - New recipe/recipe card
    - Serving suggestion on pack
    - Cooking show on TV/Recipe in magazine
- Food choices are strongly affected by what others in the family will eat or might eat. This is especially the case with children but also male partners who are reluctant to eat vegetables.
- Meat is a strong driver – vegetables are chosen to go with the meat, not the other way round
- Asked to name an Asian vegetable most people nominated "buk choy"

- The main reasons people don’t purchase Asian vegetables are:
  - Not knowing how to cook them
  - Not knowing what they taste like
  - Concern that their children or partner won’t like them and the food will be wasted
  - Fear of a culinary flop and ‘loss of face’
- Positive attributes of Asian vegetables were thought to be:
  - Healthy
  - Fresh
  - Local
  - Cheap
- Speciality Asian stores were seen as the most appropriate place to purchase Asian vegetables, followed by independent retailers.
- Recipe cards can be an effective way of overcoming some of the barriers to purchasing Asian vegetables so long as the recipe is quick to make and simple with relatively few ingredients (say approximately5). The main photo of the dish must make it look very appetising while adding photos of the individual ingredients is preferred.
- In-store taste testing and good presentation in stores can also help overcome barriers to purchase.

6. Quantitative Consumer Research

6.1 Aim

The purpose of the quantitative survey was to examine whether the information generated by the focus groups was characteristic of the wider population and also to collect some more objective data on Asian vegetable purchasing.

6.2 Method

The quantitative survey research was conducted using an on-line national panel. There is some evidence that on-line surveys assess consumer behaviour more accurately than face to face surveys by reducing the temptation for participants to respond according to what they think will be most positively received – there are no social kudos to be gained by fibbing to a computer!

The survey involved 1015 participants from all around Australia, all of whom had nominated that they were the main grocery buyer for their household. The survey cannot be said to be a random sample, participation being affected by;

- Willingness to complete the survey
- Access to, and familiarity with, a computer

Despite this, the demographics of the participants were generally consistent with those in the Australian population;

Age ranges	Similar to the population
Male / female ratio	77% of the survey participants were female compared to 51% of the general population. This reflects the dominant role women still have in purchasing groceries for the household. However, the fact that 23% of survey participants were male demonstrates that male preferences should not be ignored.
Education	Tertiary and secondary education levels generally reflected those of the community with the exception of the number of participants who had not finished school; 18% of respondents had not finished school compared to 39% in the population. This bias is likely to be the result of the survey being online, so respondents needed computer skills.
Marital status	There was a slight bias towards married and away from single people within the survey group, also reflected in a lower number of single person households.
Children	Similar to the population
Working	Similar to the population
Occupation	There was a bias towards sales and clerical workers and away from trades and unskilled, again possibly reflecting the online nature of the survey
Salary	17% of the participants stated they earned less than $25K annually compared to 23% of the population. Other income brackets were similar.
Location	Distribution of participants between rural, regional and metropolitan areas and between the major cities and states was consistent with the population as a whole.

Graphs showing the differences between the survey group and what might be expected in a totally random sample of the population are shown in Appendix 3

6.3 Results

6.3.1 Where do you shop for most of your fruit and vegetables?

The results for this question were extremely consistent across all demographic groups. Factors such as age, education and presence or absence of children had little effect. There was a slight trend to less use of supermarkets in the highest and lowest income brackets, but the relatively low figures in these categories make any conclusions uncertain.

The results are consistent with the generally held figures that 50-60% of fruit and vegetables are retailed through the major supermarket chains (Fig 6.1).

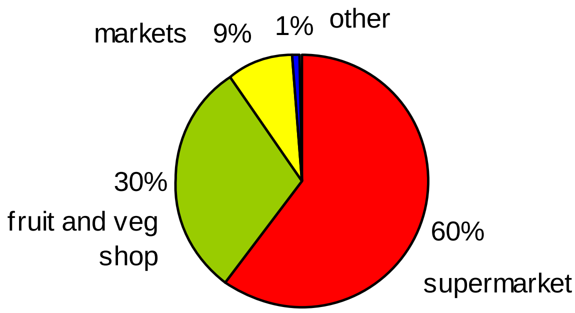


Figure 6.1 – Where people shop for most of their fruit and vegetables.

6.3.2 How do you usually decide which vegetables to buy?

In answer to this question, participants were offered the choices of;

- Same basic purchases each week
- Have a list / buy to suit planned meals
- Know beforehand + some impulse buys
- Buy what's on special + some planned purchases
- Buy what looks fresh + some planned purchases
- Decide when I get to the shop
- Other

Essentially this range of responses was designed to reflect increasing spontaneity in purchase patterns.

Perhaps surprisingly, income did not appear to affect the extent to which people planned their purchases before going to the shops. Participants earning more than $75K were just as likely to focus on specials as those in much lower income brackets. Similarly, 10-12% of respondents said they bought the same basic purchases each week, regardless of income.

A minority of the survey participants knew all the things they were going to buy before going to the shops. It is much more common to have a few planned purchases which are supplemented by impulse buys (Fig 6.2).

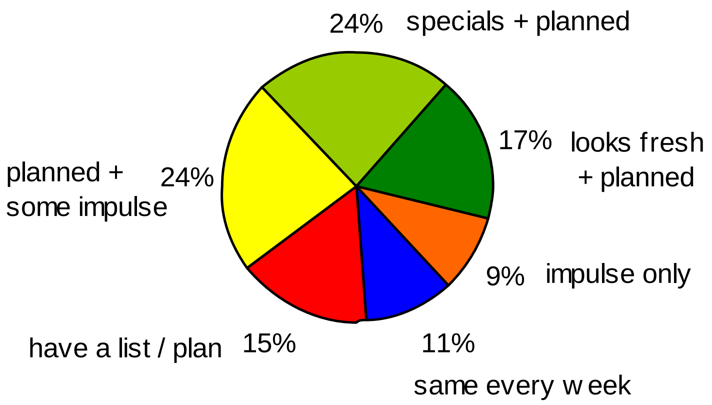


Figure 6.2 – How shoppers decide what vegetables to buy each week

However, purchase patterns were affected by age. The results suggest that older shoppers are more likely to buy on impulse than younger shoppers, the latter being focussed on pre-planned purchases (Fig 6.3). This may reflect tighter budgets among young people as well as lack of experience and confidence in cooking new foods.

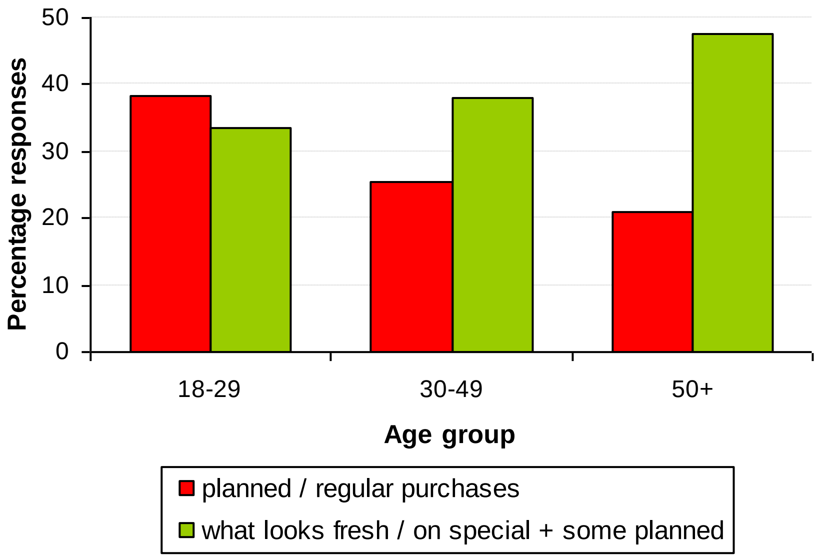


Figure 6.3 – Differences in spontaneity of purchasing between different age groups

Possibly for budgetary reasons, households of 5 or more persons were slightly more likely than people with smaller households to either know what they wanted to purchase beforehand + a few impulse buys (28%) or to buy what's on special + some planned purchases (25%).

6.3.3 Last time you cooked something new, where did you get the recipe?

The most common reported source of information on new recipes was a cookbook (25%) closely followed by magazines (24%), the internet (17%) and friends or relatives (16%) with the balance from other sources.

Although the focus groups indicated that consumers are very keen to use recipe cards, only 3% of respondents nominated this as their most recent source of information. It seems possible that although recipe cards may stimulate purchase, shoppers don't use the recipes they contain. This might also reflect issues with some available recipe cards, which may seem too complicated or have extra ingredients not available in the fruit and vegetable store.

Use of the internet among the younger age group is perhaps unsurprising. However, even among the over 50's, 15% were using the internet to access new recipes (Fig 6.4). Such a strong response may be an artefact of the nature of this survey as an online exercise. However, this is to some extent backed up by previous surveys and comments during the focus groups. It is clear that the internet is a significant source of information for many people.

It is also noticeable that older shoppers are more likely to make recipes from magazines. Presumably this group is more likely to buy the 'Womens Weekly' (which contains recipes) instead of 'Who' magazine or 'Famous and Hot'! (which usually don't).

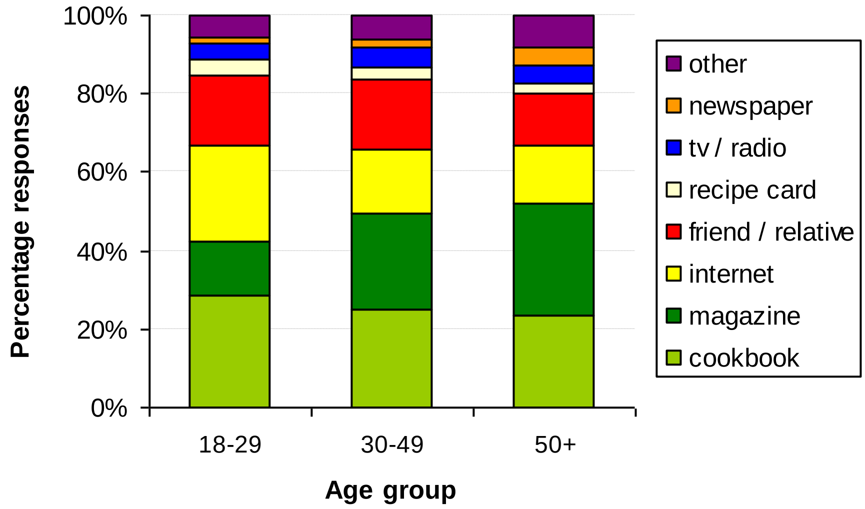


Figure 6.4 – The most recently used source of a new recipe by different age groups

Magazines were a popular source of information among clerical and sales staff. In contrast, those in unskilled jobs were less likely to use written information (Fig 6.5). Instead, they were likely to make recipes provided by friends or relatives, or seen on TV.

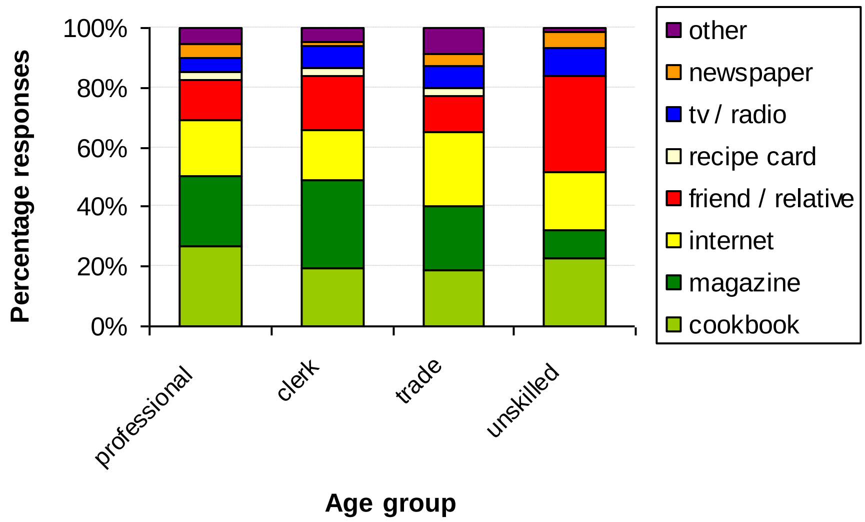


Figure 6.5 – The most recently used source of a new recipe by occupation

6.3.4 Do you ever buy packaged salads or other semi-prepared fresh vegetables?

Respondents who worked full time or lived in larger households with children tended to be more likely to buy pre-packs than those without children. However, the difference was not as great as one might have expected for relatively high cost products designed for convenience. Around 72% or those in full time work reported buying these products compared to 65% of those not working. Likewise purchases increased from 64-65% in 1-2 person households to 75% of households with 5 or more members.

Purchases were highest among sales / clerical workers and fell markedly among unskilled workers (Fig 6.6). They were also higher among the more educated respondents (data not shown). No general trend was observed by income or location.

Fig 6.6 - Percentage of respondents who reported buying pre-packed salads or other semi-prepared fresh vegetables by occupation.

6.3.5 I'm now going to ask you some questions about fresh 'Asian Vegetables'.

By this I mean vegetables like Buk Choy, Chinese Cabbage and Choy Sum. Are vegetables like these available where you shop?

From this question, it seems that availability of Asian vegetables is usually not a problem. A high **76%** of respondents said that these products were available where they shopped while a further **14%** said they were sometimes available. Only 3% said they were not available with the remainder being unsure.

There was also a difference in availability between rural and metropolitan areas (Table 6.1).

Table 6.1 – Availability of Asian vegetables in different areas

	Total	Regional		Metropolitan	
		Rural %	*Town %*	*Small city %*	*Large city %*
Yes	76	62	64	78	80
No	3	3	3	5	2
Sometimes	14	24	27	10	10
Don't know	7	11	6	7	8

6.3.6 Have you ever purchased any Asian vegetables to cook at home?

A total of 75% of respondents said they had purchased Asian vegetables. The likelihood that respondents had purchased these vegetables increased with income (Fig 6.7). This suggests that those who are budget conscious are less likely to try something unfamiliar or new, even though Asian vegetables are relatively inexpensive.

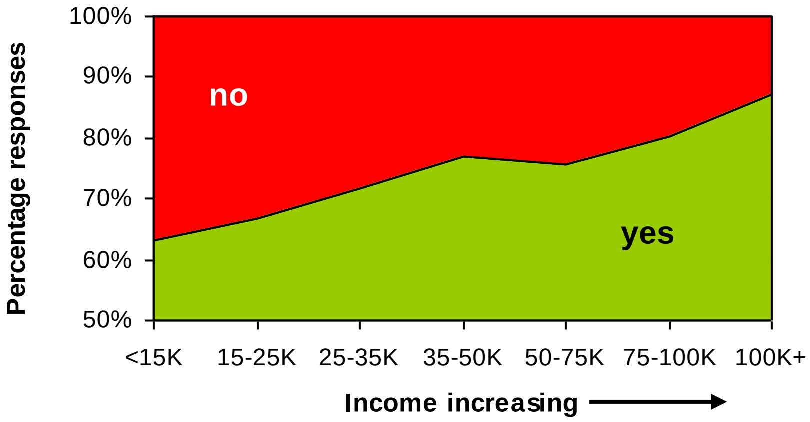


Figure 6.7 – Percentage of people who have (yes) or have not (no) bought Asian vegetables to cook at home according to income bracket.

Professionals and those with vocational or tertiary education were the most likely to have purchased Asian vegetables to cook at home.

Although households without children were more likely to have purchased Asian vegetables than those which had children, in general the likelihood of purchase rose as household numbers increased. This suggests that Asian vegetables are more likely to be purchased by those cooking larger amounts of food as well as the adventurous.

In some cases, those who hadn't purchased these products may have been unable to do so due to unavailability. This is particularly the case for Tasmanians in either rural or metropolitan areas (Fig 6.8).

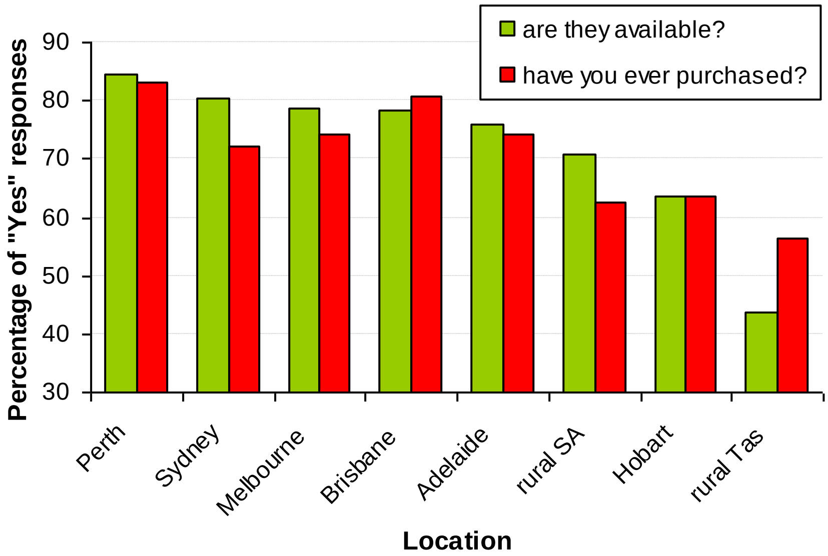


Figure 6.8 – Number of respondents who said that Asian vegetables were available where they shop and that they have purchased these vegetables by location (rural areas of WA, NSW, Vic and Qld similar to metro results).

Of course, these results may also have been affected by what is defined as an 'Asian vegetable', despite the initial prompt given in Q5. The focus groups indicated that products such as shiitake mushrooms, snow peas and baby corn are all considered Asian vegetables although they are outside the scope of this project.

6.3.7 How often would you purchase one or more of these vegetables?

The majority of those who purchased Asian vegetables did so every 2-4 weeks, effectively monthly (45%). Only 21% bought the vegetables on a weekly basis, the others purchasing every few months (25%) or even less often (8%).

It is interesting to compare these results to those obtained in the face to face survey conducted at the Royal Easter show (Fig 6.9). In that survey more than half of the respondents said they purchased the vegetables weekly. Only 4% of participants said they never bought Asian vegetables compared to 25% in the on-line survey.

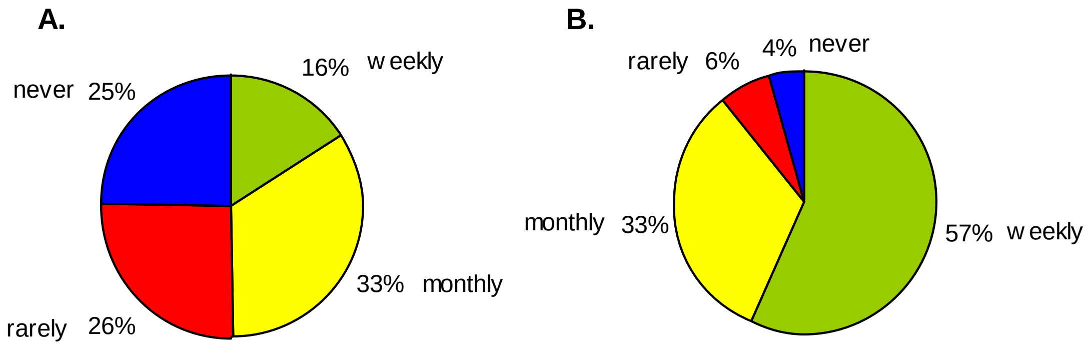


Figure 6.9 – Percentage of survey participants who said they purchased Asian vegetables weekly, monthly (every 2-4 weeks), rarely (every few months or less often) or never in A. the online survey and B. the face to face survey conducted at the Royal Easter Show.

In general, frequency of purchase was highest among those with tertiary qualifications and increased slightly as income rose (Fig 6.10).

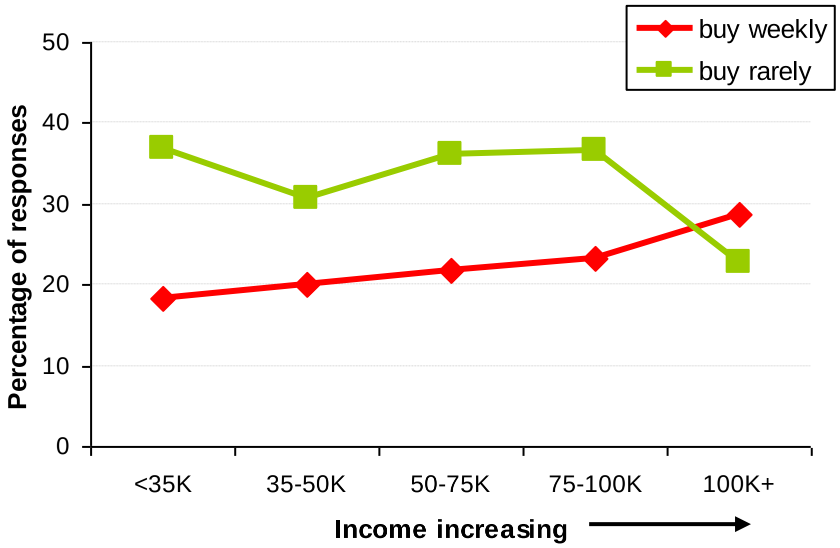


Figure 6.10 - Effect of income on stated frequency of purchase for Asian vegetables

6.3.8 Can you tell me *why* you have never purchased them?

Perhaps unsurprisingly, the commonest response to our last question was that people don't know how to use the vegetables (Fig 6.11). The next commonest response was that they had simply never thought about trying them or just hadn't got around to it, followed by uncertainty about whether they / their family would like the vegetables. Only 1 of all the trial participants hadn't bought Asian vegetables because the quality in the stores was too poor while 2 people said that they simply weren't available.

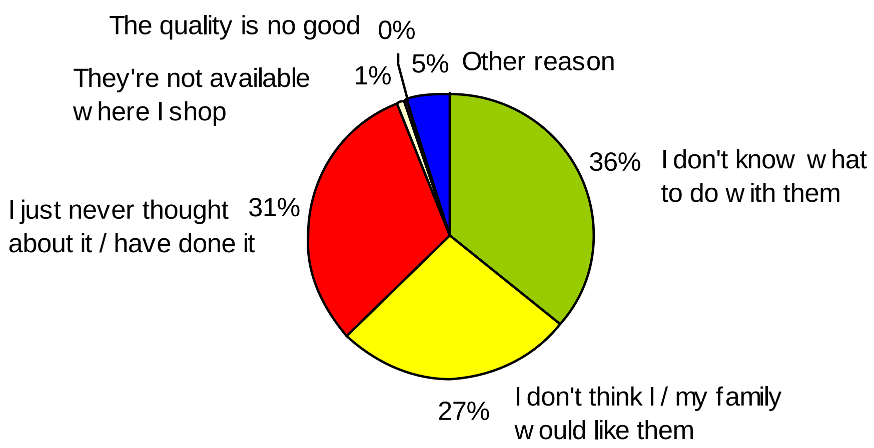


Figure 6.11 – Reasons given by the survey participants as to why they had not purchased Asian vegetables (n=251)

6.4 Discussion

Conducting a survey using the internet proved to be an effective and economical way of gathering data on shopping habits. Although this method obviously skewed the sample towards the computer literate, the demographics were mostly similar to those in the general population. Also, people may be more honest doing a survey anonymously than if they are doing the interview face to face with another person. As a result, using the internet may have reduced overall bias in the answers

The results showed that, when deciding what vegetables to buy, 74% of people make at least some of their decisions while in the store. Purchases may be triggered by what looks particularly fresh or attractive as well as specials and impulse purchases. Only 26% of respondents said they only bought planned items. This suggests that nearly ¾ of consumers can be influenced to buy something (perhaps using an eye-catching display, point of sale materials or special offers) while they are in the store!

It was interesting that over 60% of respondents said that they purchased pre-packed salads or other semi-processed fresh products. This reflects a high level of acceptance of such products among modern Australian consumers. Had the same question been asked some years ago it seems likely that the response would have been quite different.

In our study education increased the likelihood of purchase of pre-packed fresh products but income did not. A Belgian study of purchases of minimally purchased vegetables also found that better educated consumers and those with children were more likely to buy minimally processed vegetables (Ragaert et al., 2004). However, this work further suggested that purchase was more likely among higher income groups, a result supported by British research showing that low income groups were less likely to purchase high value products such as leafy salads, beans and broccoli (Leather, 1995). Such differences may be because fresh produce remains relatively cheap in Australia compared to Europe as well as differences in eating habits generally.

Although purchases of pre-packs did not increase as income with increasing income, purchases of Asian vegetables did. This appears to be the opposite of what one might logically expect – that higher income groups would buy expensive products while those on lower incomes would tend to purchase cheaper products – like Asian vegetables. That this did not occur further reinforces the previous supposition that the price of vegetables is not a major factor in whether or not they are purchased. Consumers are looking for attributes like flavour, texture, freshness, variety, healthiness and utility. Price is likely to be a lower consideration.

The results indicated that 75% of consumers had purchased Asian vegetables with nearly half of these saying they did so every 2-4 weeks. This was much lower than the results from the previous Easter Show survey (Chapter 4). However, it is likely that this is still a significant overstatement of purchases given what we know about sales volumes. Other studies of consumers have shown that people will tend to overstate purchases of products which are perceived as healthy and which therefore have a positive social status. This overstatement may be as much as double actual purchases (Koster, 2003).

Of the people who said they hadn't ever purchased Asian vegetables, there were nearly as many who had just never thought about it as those who said they did not know what to do with them. Both of these categories (67% of the negative responses) could be potentially be persuaded to purchase by providing information and other stimuli. This again points to the potential effectiveness of point of sale materials in the store.

The third most frequent reason given for non-purchase – that they were unsure whether they or their family would like the vegetables – may be overcome through in-store taste testing or campaigns which focus on the flavour and texture of these products.

The results reinforce the conclusions from the focus groups; that a targeted and well structured marketing campaign could significantly increase sales of Asian vegetables.

6.5 Key messages

- Over 1,000 grocery buyers were surveyed using a national online questionnaire. Although the survey was unavoidably biased towards the computer literate, participants generally reflected the national demographics in terms of location, profession etc.
- Conducting a questionnaire online avoided the bias which can occur during face to face interviews if subjects provide the answers they think the questioner wants to hear
- 60% of participants shopped for most of the fruit and vegetables at supermarkets, regardless of demographic group.
- 74% of shoppers make at least some of their purchase decisions once they are in the store. Older shoppers were more likely to make spontaneous decisions than younger people. Most consumers could potentially be influenced by specials, enticing displays, point of sale materials etc.
- Cookbooks and magazines were the main sources of information when looking for new recipes. However, the internet was also an important source of information for many.
- 69% of participants said that they sometimes purchased packaged salads or other semi-prepared fresh vegetables. Purchases were more likely as education level and work skills increased but were not related to income.
- Asian vegetables were less likely to be available in rural areas than in Metropolitan centres and were least commonly available in Tasmania.
- 75% of respondents said they had purchased Asian vegetables to cook at home, of which around half said they purchased them once every 2-4 weeks. Sales data suggests that this is likely to be a significant overstatement or purchases, reflecting the positive image of ‘healthy’, ‘fresh’, and ‘green’ Asian vegetables.
- The main reasons for non-purchase were that they did not know what to do with the vegetables (36%), they just never thought about it (31%) or that they were afraid that they / their family wouldn’t like them (27%). An effective marketing campaign could potentially overcome these barriers with point of sale information and in-store taste testing.

7. A Marketing Strategy for Asian Vegetables

Much of this marketing strategy was developed and authored by Mr Richard deVos, as part of his consumer research into Asian vegetables.

7.1 Enticing and Exciting new consumers

Stimulus + Knowledge + Reassurance + Ease = New Purchase

We have seen that the primary barriers to new purchase of Asian Vegetables are:

- Lack of awareness about them and how to prepare (including taste, preparation, cooking, what they go with etc)
- Concern that they/their family/their partner may not like them

Preparedness to try increases markedly if information is provided, particularly for some demographic groups. So in marketing terms the keys to success will be:

- Stimulate the fruit and vegetable shopper's (meal preparer) interest in something new. Give them a reason to have a go. Make it enticing.
- Give them the information that they need, to help decide (i.e. what it tastes like, what it goes with, it's nutritional benefits).
- Reassure them that it won't be too difficult to prepare and that their family/partner/guests will love it.
- Make it easy to buy the ingredients and follow the recipe.

7.2 Who to Target?

A critical early question is who to target. It makes no sense to say that all fruit and vegetable purchasers should be targeted equally; a focussed approach is much preferred. This would be aimed directly at those fruit and vegetable purchasers/preparers that are the most likely prospects. They are known as 'Early Adopters' and often in markets lead the way in trial of new products or new practices. Their positive experience is an example to the others who may be more hesitant. In a sense, they set the trend.

From this research it is clear that the early adopters (i.e. Primary Target Market) in new (and then regular) purchase of Asian Vegetables are:

- Young women (and to a lesser extent men), aged 25–40 years, living with a partner but with no children.
- In the upper-middle and upper socio-economic brackets.

Targeting these early adopters does not mean that others fall by the wayside. If properly crafted, the marketing messages and strategies will have a flow-on and probably aspirational impact on other secondary demographics.

It is always useful to define a secondary target market. This is a group for which the messages and strategies will appeal and who can be more directly targeted when funds permit. In this case, the Secondary target market would be defined as:

- Women (and to a lesser extent men), with school-aged children.
- In the upper-middle and upper socio-economic brackets.

7.3 Key Considerations

7.3.1 What's in a Name?

'Asian Vegetables' has served this project well as a working description of the product, but it is not a marketing-oriented description or brand. It's a group description such as 'pulses', '4 wheel drives' or 'snack food' – but even the latter two carry some degree of purpose description.

Furthermore, Asian Vegetables means many different things to different people. It's not a clear, universally accepted produce group description.

On the other hand, using the tag "Asian" does offer opportunities to link in with events, foods, travel and other Asia themed activities.

While it may be appropriate to continue using 'Asian Vegetables' within the industry as a vegetable grouping, it may be best to promote the individual types and marry that with a more consumer-oriented marketing theme. For example, they could be referred to as 'Exotic vegetables'. Further research could test the effect of branding as 'exotic' compared to 'Asian' on the primary target markets.

7.3.2 Essential Alliances

Marketing produce, particularly fruits and vegetables, requires the coordinated effort and commitment of various people and groups (or stakeholders) if it s to be successful. Everyone involved must be informed and on-board.

For a program to promote Asian Vegetables, some of the alliances that may be needed are:

- Growers and wholesalers – to ensure the product is available and the quality is excellent
- Retailers – to actively participate and promote in their outlets.
- Trade media – to talk-up the promotion and publicise it within the industry.
- Sauce manufacturer/distributor – to participate in in-store activities
- Cookware manufacturers – to participate in cross promotional activities
- Food Media – primed and ready to run the stories provided.

7.3.3 A Multi-faceted Approach

No one marketing strategy will be sufficient to drive interest and new purchase. To ensure maximum impact consumers will need to see the message in a number of different ways from a number of different directions.

7.3.4 Test it First

Before embarking on a national program it would be wise to carefully test all the elements within a particular test market. This allows an opportunity for review and adjustment before the major campaign (and major expenditure) is rolled-out.

7.4 The Mechanics of a Campaign

7.4.1 Theme / Image / Message

The marketing campaign must have an engaging and interesting theme which will be used throughout all strategies and materials. To capture the imaginations of consumers, the theme should be creative but also fit with their current beliefs. Development of the theme is a task for creative communication specialists, but as an example one that could work well would be:

"Asian Discovery"

- Fits with the idea that most consumers can really discover something new; the taste, enjoyment and ease of preparation of Asian Vegetables.
- Is what is called, 'campaignable', so that it can be used and extended in a number of ways:
    - Marketing messages built around "Take your family/partner/self on an Asian Discovery"; "Discover a world of new taste with . . ."; "Discover how easy . . ."; "Discover the health benefits of . . ."
    - A consumer promotion with an Asian Discovery holiday as a prize.
    - A Media event based around discovering hidden or new or different Asian dishes.
- Has a neat double entendre with the travel industry usage.

7.4.2 Timing

Scheduling of the marketing activity is critical. While it is understood that Asian vegetables are not essentially 'seasonal' consideration should be given to:

- Avoiding times when other vegetables may be doing a concerted push and therefore have media attention (e.g. during Perfection Fresh's Mediterranean vegetables promotion)
- Climatically, when it is best to be preparing Asian Vegetables. When would it 'feel' right for consumers (e.g. presumably not mid-winter or mid-summer)?
- Choose a time when related topics may be in the news (e.g. the Beijing Olympics, Chinese New Year).
- Choosing a time when retailers are more likely to be willing to participate and not pressed for time (e.g. avoid Christmas, Easter etc).

Two other factors to bear in mind in relation to timing are:

- Ensuring that all activity is scheduled to happen at around the same time (say an 8 week campaign) so that consumer exposure to the campaign messages is maximised.
- Bear in mind the long lead-times of some media (up to 12 weeks in the case of magazines and more for some TV programs)

7.5 Strategies

Three core strategies are recommended:

7.5.1 Media / Public Relations

Promotion and publicity through the food media should ideally cover all channels – Radio, TV, Magazines and the internet. For example, depending upon the message it may be possible to get coverage on "Sunrise", or in the business press. This is not to suggest that the aim should just be to get coverage wherever possible. The task is to ensure coverage in the media and programs that best reach the target market(s).

The power of a well planned and innovative media event cannot be underestimated. It can do much to put the products (and industry) forefront in the minds of the media.

7.5.2 In-store Activity

This is where the campaign must really work as it's where the purchase decision will be made. It is strongly recommended that in-store activity be well planned and managed, preferably by specialists who do this well. It could involve:

- Working with selected retailers located in areas of high concentration of the target market(s).
- Special in-store presentation in a high visibility location in the store.
- Recipe cards prominently displayed right alongside the featured produce.
- Additional point-of-sale promotional material (e.g. posters).
- In-store sampling at peak sales times.
- Special information/training for store staff.
- Some involvement/engagement of store staff (e.g. caps, t-shirts, badges)

7.5.3 Within Industry Promotion

This is aimed to engage and excite those along the supply chain. This could take the form of:

- Special newsletter
- Presentations or briefing for agents at the central markets
- Coverage in trade media
- A formal 'launch' involving a personality, or politician. This can link well with the public media activity.

7.5.4 Tools

Each Strategy will require a number of tools and these will be determined as the marketing plan is developed. However, as a guide, some which may be appropriate are:

Media/PR

- Recipes/Recipe development
- Media Packs, Photos, Fact Sheets and Releases
- Recipe Cards

In-store Activity

- Recipes/Recipe development
- Recipe Cards
- Other point of sale materials
- Taste-testing notes and background information

Within-industry promotion

- Media releases and fact sheets
- Campaign 'presenter' flyer or brochure
- Presentation (e.g. PowerPoint) and handouts for presentations.

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9. Appendix

Appendix 1

WIN!
"Authentic Asian Ingredients"
by Carol Selva Rajah

What Asian veggie is that?

Name : ______________________ Phone number : ______________________

Lives at (suburb or town or country) : ______________________

Age group : <18 ☐ 18–30 ☐ 31–50 ☐ >50 ☐

Gender : Male ☐ Female ☐

Language spoken at home : English ☐ Other : ______________________

1. Look at the sheet of pictures of Asian vegetables. How many do you recognise? __________
2. How often would you buy one or more of these vegetables?

   Regularly / weekly ☐ Occasionally / monthly ☐

   Rarely / every few months ☐ Never / <3 times ever ☐ (*Go to question 5*)
3. Think about the last time you bought one of these vegetables. What made you decide to buy it? (*OK to tick more than one*)

   Regular purchase (habit) ☐ Cheap / good value ☐ Healthy ☐

   Looked good – impulse buy ☐ Need for recipe or to go with a specific meal ☐

   Saw on TV / in magazine ☐ Try something different ☐

   Other : ______________________
4. What sort / sorts did you buy? ______________________
5. In the last year, have you made a particular dish after seeing the recipe on TV or reading about it in a magazine?

   Yes, regularly / weekly ☐ Yes, occasionally / monthly ☐

   Yes, a couple of times ☐ Never or maybe once ☐

   Not sure ☐
6. In the last year, have you used recipes from cooking books you have at home?

   Yes, regularly / weekly ☐ Yes, occasionally / monthly ☐

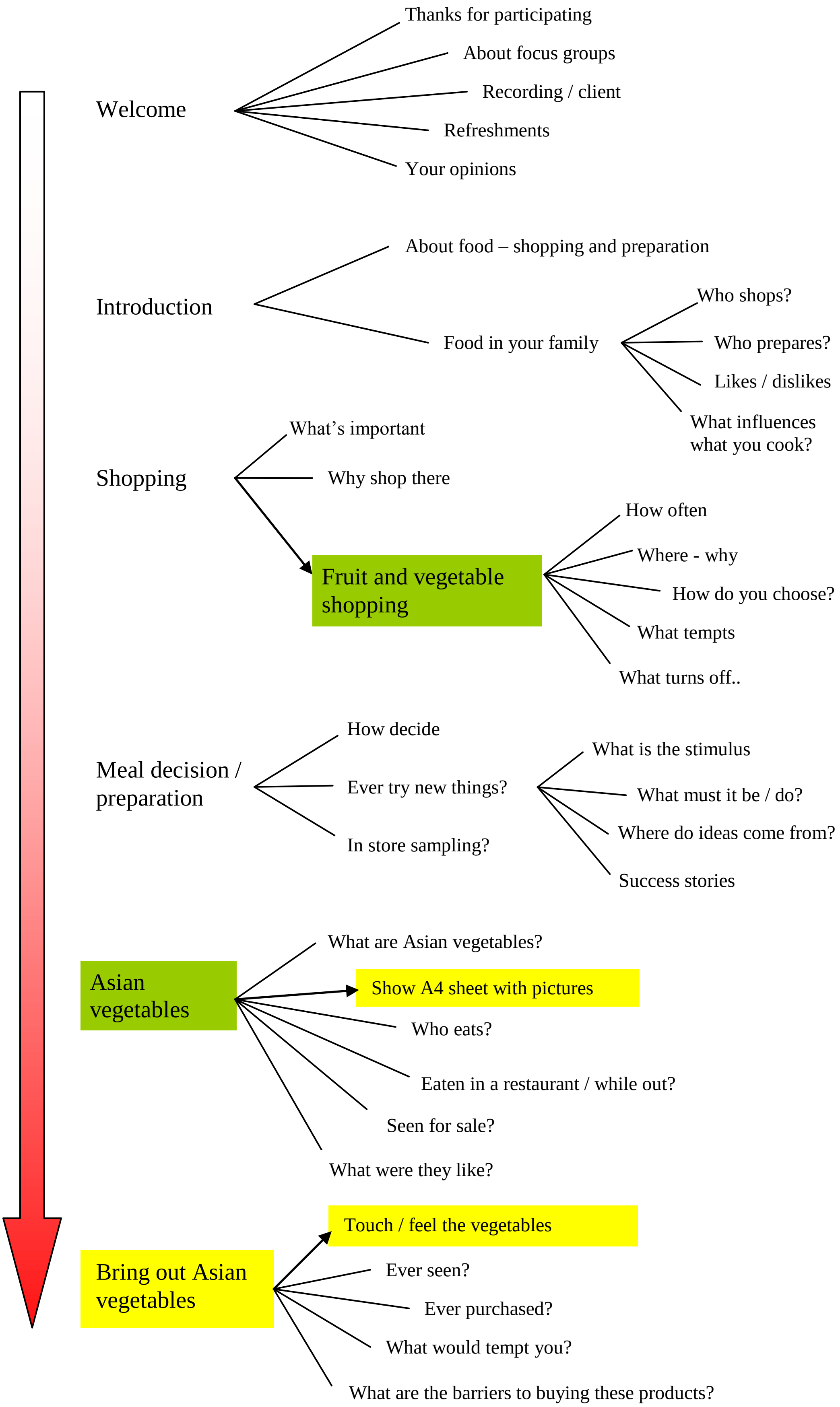
   Yes, a couple of times ☐ Never or maybe once ☐

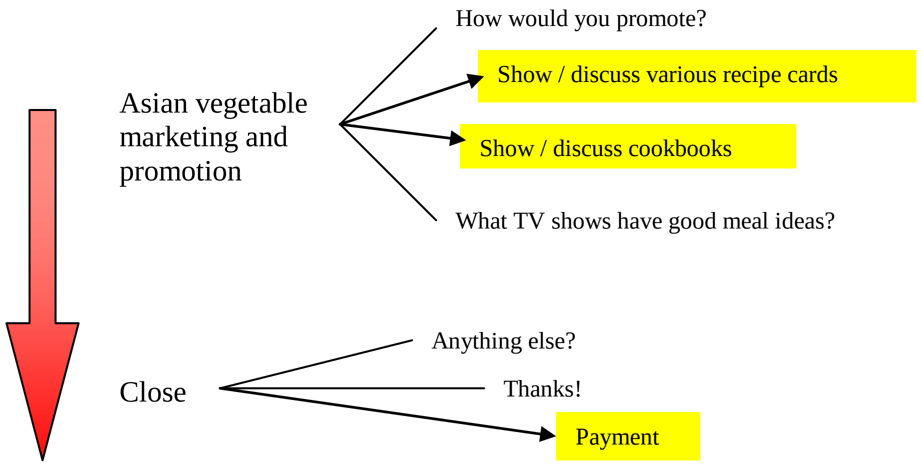
   Not sure ☐
7. In the last year, have you purchased a product after taste testing it in a shop?

   Yes ☐ No ☐ Not sure ☐
8. Any other comments? ______________________

Thankyou for your time ☺

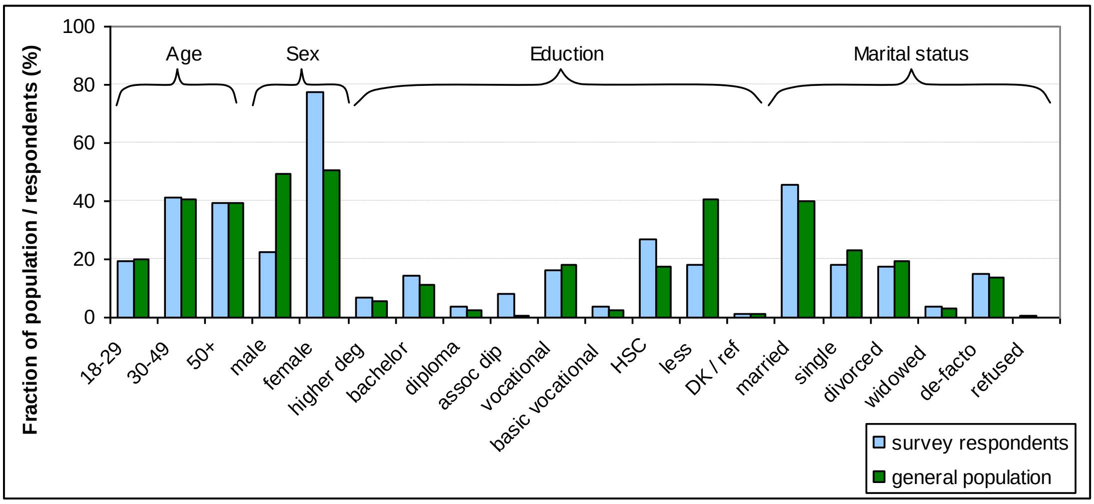
Appendix 2

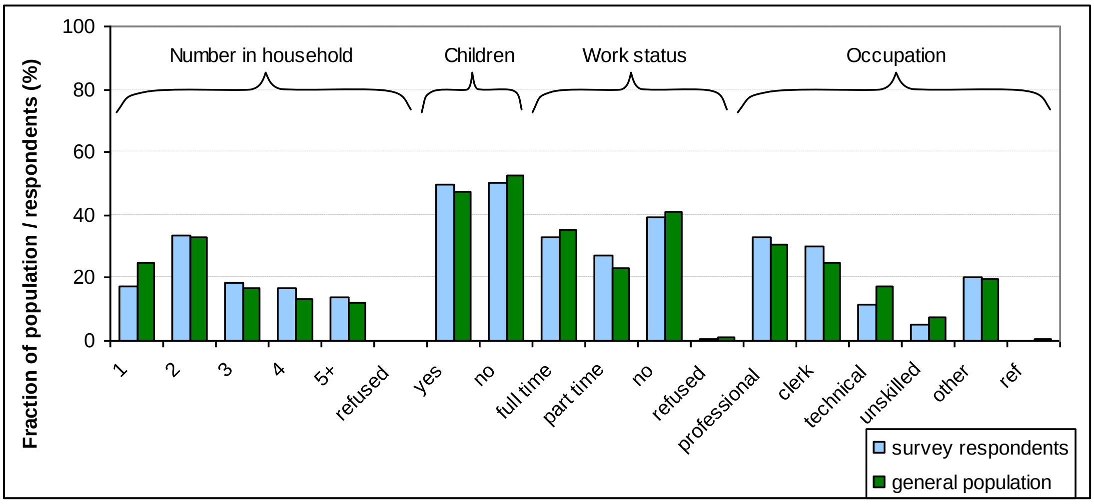

Welcome
Thanks for participating
About focus groups
Recording / client
Refreshments
Your opinions
Introduction
About food – shopping and preparation
Food in your family
Who shops?
Who prepares?
Likes / dislikes
What influences what you cook?
Shopping
What's important
Why shop there
Fruit and vegetable shopping
How often
Where - why
How do you choose?
What tempts
What turns off..
Meal decision / preparation
How decide
Ever try new things?
In store sampling?
What is the stimulus
What must it be / do?
Where do ideas come from?
Success stories
Asian vegetables
What are Asian vegetables?
Show A4 sheet with pictures
Who eats?
Eaten in a restaurant / while out?
Seen for sale?
What were they like?
Bring out Asian vegetables
Touch / feel the vegetables
Ever seen?
Ever purchased?
What would tempt you?
What are the barriers to buying these products?

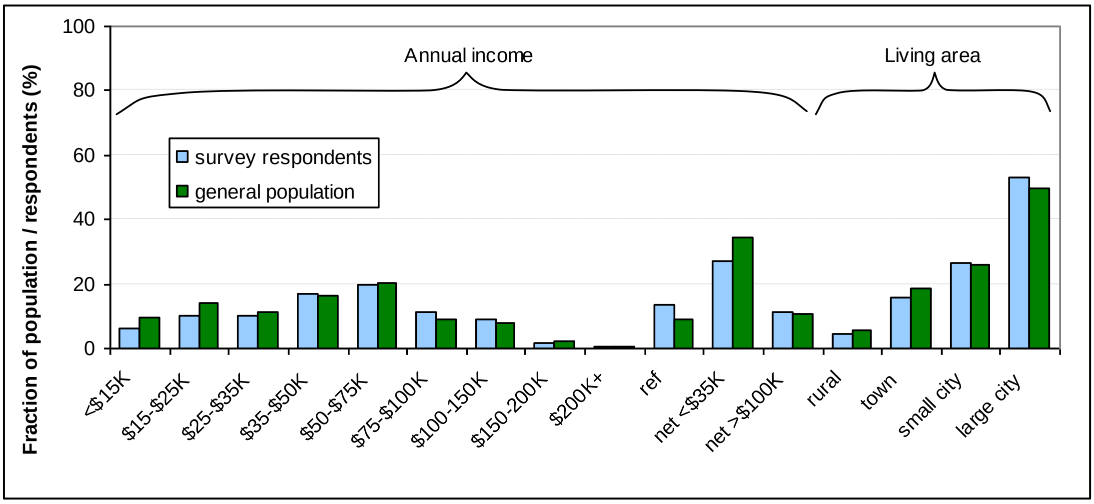

Asian vegetable marketing and promotion
How would you promote?
Show / discuss various recipe cards
Show / discuss cookbooks
What TV shows have good meal ideas?
Close
Anything else?
Thanks!
Payment

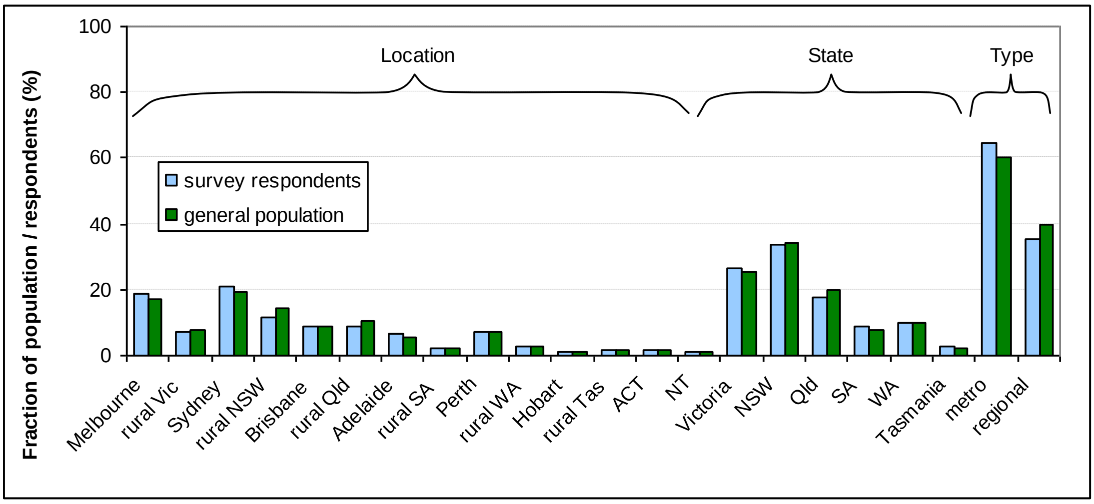
Appendix 3

Correlation in demographics between respondents to the quantitative survey and that which would be expected in a random sample of the population








Fraction of population / respondents (%)
100
80
60
40
20
0
Location
State
Type
survey respondents
general population
Melbourne
rural Vic
Sydney
rural NSW
Brisbane
rural Qld
Adelaide
rural SA
Perth
rural WA
Hobart
rural Tas
ACT
NT
Victoria
NSW
Qld
SA
WA
Tasmania
metro
regional