



Know-how for Horticulture™

**Potato industry
communications
review and strategy
development**

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Socom Pty Ltd

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Horticulture Australia Limited

Potato Industry Communication Plan

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Potato Processing Association Australia



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1.0 Situation analysis

The potato industry needs to remain competitive on a price and quality basis. Growers are encouraged to farm 'smarter' by using best practice to combat disease, water and land shortages and to decrease their overhead costs.

Grower levies have funded a range of research and development (R&D) initiatives aimed at strengthening the industry through knowledge and best practice farming.

However, research undertaken as part of this project has revealed that most growers are unaware of the R&D projects their levies fund and what these important research projects mean to them at a practical level.

Of equal concern is the fact that very few growers surveyed acknowledged implementing levy-funded R&D programs on their properties.

At a macro level, the industry is facing global economic pressures, a tightening of regulatory systems and a more competitive retail market place.

This is all set against the backdrop of a fragmented potato industry sector that currently lacks a strong and centrally located advocacy voice.

This communication plan is based on the outcomes of the:

- Consultation with individual members of the fresh and process potatoes Industry Advisory Councils (IAC);
- Discussions with service sector/agents, including agronomists, horticulturists and agents;
- Telephone research conducted with process and fresh growers throughout Australia;
- Internal publication audits; and
- External benchmarking audits.

The plan provides communications objectives, strategic communications recommendations, tools and tactics and resource analysis.

This plan also acknowledges the inherent differences between the needs of process and fresh market growers. Generally speaking, process growers are less interested in consumer and marketing insights as they tend to have a secure market through established relationships with major processing companies. Fresh growers on the other hand operate in an environment in which their markets are less secure and subject to change and fluctuation.

Tools and tactics have been developed to complement and support the implementation of:

- The processed potatoes R&D program; and
- The generic marketing program under development for the fresh potato market.

2.0 Communication objectives

The following communication objectives are based on those initially developed in consultation with the IACs. Further refinement has occurred following analysis of the grower telephone research and additional consultation with individual IAC members.

2.1 All growers

- Increase profitability by encouraging the adoption of best practice.
- Increase awareness of the linkages between the potato levy and R&D investment.
- Increase awareness that the potato levy is being invested to meet grower needs.

2.2 Process growers

- Increase communication between researchers.
- Attract more young/graduate researchers to the sector by raise awareness of research opportunities.

2.3 Fresh growers

- Ensure that communication supports generic marketing activities targeting end-consumers.
- Improve wholesaler and retailer understanding of varietal and season opportunities.
- Provide a voice for the sector on significant policy and regulatory issues.

3.0 Target Audiences

Target audiences have been split into primary and secondary audiences. Primary audiences include those stakeholders who should be provided full access to the tools and tactics described within this strategy, while secondary audiences will receive selected information.

3.1 Primary audiences

- Potato growers for the fresh markets
- Potato growers for the process markets
- Processing companies
- Industry researchers & academics
- Service industry (chemical, seed & fertiliser agronomists etc)
- Wholesalers
- Retailers
- End-consumers

3.2 Secondary audiences

- State and Federal regulators and policy makers
- Members of State and Federal parliament
- Other industry publications (eg Pro-Farmer Australia)
- Mainstream and metropolitan media

4.0 Strategic Recommendations

4.1 Structure & resources

Work within AUSVEG structure

Currently, the Australian Potato Industry communication plan is implemented as part of the Australian Potato Industry Technology Transfer Project. The initiating body for this project, the Australian Potato Industry Council (APIC), no longer exists and officers responsible for implementation have limited resources, support systems and infrastructure.

AUSVEG has an established communications team with experience in managing media relations and campaigns, production of professional publications and websites and other grower orientated communications. This team can provide the necessary specialist support to implement this plan.

Also, industry research and consultation indicates a desire among primary audiences to broaden the scope of the communication activities to encompass industry advocacy. This outcome could be more readily achieved for the potato sector if its communication function was undertaken by AUSVEG.

Build and control existing data bases

Grower and industry data-bases must be available to the organisation or individuals responsible for implementing this program.

Currently a variety of state bodies control grower data bases. This situation will make full and effective implementation of many of the tools and tactics described within this strategy difficult or unnecessarily complicated.

4.2 Communication timing & frequency

Simplify content and layer communication outputs

Growers currently receive too much information, not only from the potato sector, but also from other agriculture sectors. To improve uptake of R&D initiatives, the potato sector needs to simplify its current and future communication tools. This can be achieved by providing simple, bite-sized information in the first instance and supporting with mechanisms that will enable access to more detailed information.

Introduce change gradually

To minimise adverse reaction and/or negative criticism it is recommended that new communication activities or adjustments to existing activities be introduced gradually over the two year life of this plan.

Align communications to mirror seasonal activities

There are opportunities to tie existing and proposed communication activities to seasonal cycles (i.e. seed planting, cropping, spraying etc). This approach will make communications more responsive to grower needs and help improve chances of R&D uptake.

Given the different cycles between states, this approach will not be practical for the more detailed and infrequent publications such as Potatoes Australia. SMS alerts and the provision of fact sheets may be more readily tailored to suit seasonal variations between states.

4.3 Tools, tactics & content

Increase the mix of mediums (including new technologies)

The current communication plan focuses primarily on publications and email/extranet services that target internal audiences (particularly growers and researchers). This plan recommends an increased mix of communication tools to reflect the usage patterns of primary stakeholder audiences.

Increasing the mix of mediums should also encompass leveraging opportunities available from external mediums. The current potato sector communications approach does not include either a responsive or proactive media function. Given there is no single potato sector spokesperson, several media opportunities have been missed. Having this function is important in creating a sense of identify for the sector and may support advocacy work.

Proactive and responsive media functions may be provided within existing AUSVEG structures.

Increase the level of face-to-face communications

There is strong support across all primary stakeholders for increased face-to-face communications. With the decline in the number of dedicated extension officer functions around the country, it is proposed that alternative existing networks be engaged to facilitate this function. These would include service agents, horticulturalists and agronomists attached to service and processing companies and State government agencies.

Increase feedback mechanisms

Industry communication needs to employ more active feedback mechanisms across most tools and tactics proposed within this plan. This will enable on-going evaluation of the relevancy and impact of communication activities on grower and research behaviour.

4.4 Branding & positioning

Establish new brand identify for potato sector communication

Existing publications carry a number of logos and brands. In the absence of APIC and in view of the fact that these publications should emanate from the offices of AUSVEG, it is important that a new and distinctive brand presence be created for potato sector communication. This will help distinguish these tools from other agricultural industry publications and from existing AUSVEG publications.

Increase the level of consumer education mechanisms

Research and industry consultation has revealed significant demand for increased consumer education to support potential potato marketing efforts. It is recommended that this information be provided within an expanded potato sector website and reflected within the content of the existing publications.

Enhance non-grower forums

The continuing involvement of researchers in this field is critical to ensuring a competitive and viable potato industry. This point was particularly emphasised by IAC members. In view of their importance, researchers need to be provided with their own dedicated communication tools and forums.

Similarly approaches will be required with service agents, agronomists and horticulturalists to enable them to deliver messages directly to growers.

Use the media to support advocacy and position the sector

Proactive and reactive media relations can play an important role in supporting the sector's advocacy agenda as well as providing opportunities to increase consumer awareness.

This function does not exist within the current structure.

5.0 Tools & Tactics

5.1 Publications and alerts

While the research revealed reasonable levels of awareness of existing publications and high levels of satisfaction towards technical and detail levels, the fact remains that neither is having significant impact on R&D uptake levels. The following improvements to existing output and new outputs are recommended to improve this situation.

The tools and tactics described below will assist in achieving the following objectives:

- Increase profitability by encouraging the adoption of best practice.
- Increase awareness of the linkages between the potato levy and R&D investment. Increase awareness that the potato levy is being invested to meet grower needs.
- Ensure that communication supports generic marketing activities targeting end-consumers.
- Improve wholesaler and retailer understanding of varietal and season opportunities.

Potatoes Australia

As an annual publication, Potatoes Australia has limited capacity to provide timely and responsive R&D information to growers. As such, it is strongly recommended that it be recast more in the style of an annual report. This can be achieved by undertaking minor changes to internal layout and enhancing editorial content by increasing the number stories on sector regulation, pricing trends and wholesale and consumer market developments and opportunities in addition to R&D coverage. Where possible, R&D coverage should take a case study approach.

Eyes on Potatoes

The changes recommended for Eyes on Potatoes are more significant. With three issues a year and occasionally running to over 26 pages, it is difficult to distinguish what separated this publication from Potatoes Australia.

Eyes on Potatoes should be published at least 6 times a year, be timed to mirror significant on-farm activities and be significantly reduced in size. The majority of stories should focus on R&D developments and updates, be much smaller and punchier in size and style and provide readers with access to further information should they require it. The publication should also include stories on market developments, new market channels, marketing trials and supply chain developments that might assist fresh growers increase sales.

Pocket guides

While current and proposed research publications may be a helpful resource for some growers requiring additional, in-depth information, research revealed limited recall grower recall. Other sectors, notably grains, develop a series of pocket guides to major diseases affecting crops and remedies that may be employed to counteract them. A similar series is proposed for the potato sector that focuses on the top four diseases/insect infestations common to most potato crops around the country. These should be simple, small and robust publications that can be carried in farm vehicles and provide access to further information held within the archives should it be required.

Fact sheets/practice notes

All completed research projects funded by the sector should be summarised into a simple 1-2 page fact sheet or practice note. These should also include details of recommended treatments/actions that might be employed by growers to remedy the specific impacts on their crops.

These fact sheets should be made available within the extranet component of the potato industry website, related to any seasonal or crop cycle occurrence and be included as part of the email and SMS alert function. Over time, growers may build a compendium of fact sheets (either in hard copy or electronically), for future reference and application.

SMS alert service

The proposed email update service that will function off the extranet service may easily include an SMS update or alert function. By nominating to receive SMS updates or alerts, growers may receive immediate notification in the field, rather than have to wait for emails or tradition mail-outs. Notification should be used only to alert growers to disease or insect infestation and/or remind them of seasonal occurrences that may impact on crops. Growers may reply to request fact sheets/practice notes. To ensure credibility, alerts should be used sparingly and only when there is a relevant update or imminent crop threat.

Researchers' news bulletin

To ensure the continued participation of the research community and to facilitate communication between researchers working on potato specific projects, a special researcher bulletin is recommended.

Ideally, this would operate as an email service and be made available within the relevant section of the extranet site (see 5.2 for further details). It would provide short updates on the progress of current research projects, new proposals and opportunities and information-sharing requests from researchers.

Quarterly publication is recommended.

5.2 Online services

The potato industry extranet service is due to go 'live' by the end of 2005. The site does propose several useful services that should be progressed; however, its back-end functionality is cumbersome and relies on dated technology. The proposed site does not allow for public access.

These tools and tactics described below will assist in achieving the following objectives:

- Increase profitability by encouraging the adoption of best practice.
- Increase awareness of the linkages between the potato levy and R&D investment.
- Increase awareness that the potato levy is being invested to meet grower needs.
- Ensure that communication supports generic marketing activities targeting end-consumers.
- Improve wholesaler and retailer understanding of varietal and season opportunities.
- Provide a voice for the sector on significant policy and regulatory issues.
- Increase communication between researchers.
- Attract more young/graduate researchers to the sector by raise awareness of research opportunities.

Extranet

There are a number of aspects to the proposed site which can be enhanced/added. These include:

- Adding SMS alert functionality to the existing email service request form;
- Adding a user's feedback form, separate to existing email service request form;
- Offering advertising space within site; and
- Adding information on pricing, market trends and regulator issues.

With these additions, site content will be strong; however, the site will also require professional redesign to improve appearance and functionality.

Access to this site should also be extended to selected service agents, agronomists and horticulturalists. Bulletins aimed at these groups should be made available on this site.

Internet

As part of the redesign of the extranet site, consideration should be given to making aspects of the site available to the public via an internet function. This enhancement will be particularly important in supporting planned generic marketing efforts for fresh potatoes.

This can be achieved by clearly identifying the 'for consumer' section on the home page. Grower and researcher sections can retain their extranet functionality through password protection.

Content for the consumer section of the site may include:

- Nutrition and diet;
- Recipes;
- Seasonal and variety information;
- Down loadable publications;
- Information for educators to support nutritional information;
- and
- Media release section.

5.3 Face-to-face

Research and consultation has revealed that there is strong support for an increase in face-to-face communication to support the sharing of R&D information. Resources may prohibit the engagement of dedicated extension officers, but existing third party networks are recognised as the best conduits for the dissemination of information. The following tools are designed specifically to improve awareness and enhance the capacity for these stakeholders to lead face-to-face communication in the field.

The tools and tactics described below will assist in achieving the following objectives:

- Increase profitability by encouraging the adoption of best practice.

Service agents and agronomists briefing/conference

While some service agents may receive information on R&D trends and outcomes from the sector, there are further opportunities to improve the level of information provided. An annual, dedicated briefing or conference should be conducted with service agents. Presentation should be provided by levy-funded researchers, to update these agents on outcomes, progress and trends.

Service agents and agronomists update bulletins

The new service agents' and agronomists' network should be supported by a quarterly update bulletin. Content for these bulletins could be drawn from existing publications and the proposed researcher's bulletin. For cost-efficiency, this bulletin should be circulated via email and also be stored within the extranet site.

Content should, where possible, provide information on the latest research and link to their area of activity, so as to provide incentives for the agents or agronomists to share this information with growers whilst in the field.

5.4 Other

The tools and tactics described below will assist in achieving the following objectives:

- Attract more young/graduate researchers to the sector by raise awareness of research opportunities.
- Provide a voice for the sector on significant policy and regulatory issues.

Editorial and content advisory panel

A new editorial and communication content advisory panel should be established to provide input into the development of content for all publications and on-line activities. The composition of this panel should reflect the recommended shift in overall content for each of the communication tools proposed.

Ideally, the panel should include the following representatives:

- A grower from the fresh IAC;
- A grower from the process IAC;
- A member of the existing PPR&D program group;
- A generic marketing specialist or an appointed marketing officer; and
- A representative from AUSVEG.

Media relations program

The potato sector needs to appoint a media spokesperson or liaison officer who can action incoming media requests and drive proactive media opportunities.

Currently, members of the AUSVEG communication team are not responsible for fielding media inquiries and the current potato sector communication function only has responsibilities for technology transfer to growers and communication with researchers.

The sector wishes to broaden market opportunities for their products (possibly through a generic marketing program) and have a greater voice on regulatory and policy issues. To do this it will need to undertake more proactive, campaign-based media activities.

Ideally, this type of media activity could be undertaken by AUSVEG and this strategy recommends that a minimum of at least 6 media releases be issued each year.

Feedback

Each edition of Potatoes Australia and Eyes on Potatoes should carry a short reader survey form. The survey should seek to ascertain:

- If the reader has implemented any of the R&D initiatives carried in these publications;
- If the reader finds the editorial coverage useful to his/her operations;
- Other sources of information on the sector;

- Communication preferences (web, print etc); and
- What changes, if any, the reader might like to see occur with the publications.

Feedback evaluation will enable the manager of the potato sector communications plan to monitor the program's effectiveness in achieving the key objectives.

This approach may be extended to on-line communication tools.

6.0 Resources

The following tables provide estimates of hourly staff resources required to prepare and implement tools and tactics during the first and second years of this program. Resource requirements spike in the first year to accommodate set-up and transitional processes, but taper off considerably in the second year.

The tables do not include time estimates for external suppliers such as graphic designers, freelance journalists or production specialists. However, the table does account for time and resources required to manage outside suppliers.

6.1 Staffing levels and experience

All tools and tactics described here may be implemented by a mid level communications co-ordinator/executive. A person at this level would ideally have an undergraduate degree in communications/public relations or related discipline and 2-3 years work experience gained either in a consultancy or in-house environment. Their work experience and training would equip them with project management skills, strong written and verbal communications skills and a solid understanding of print, design and web development processes.

This role should report to, and receive direction from, a management function, ideally a communication manager. It would be expected that this person would provide direction on significant projects including the website development and major publications. It is anticipated that a manager would require no more than 20% of total allocated hours to perform this role.

TACTIC/TOOL (Year 1)	HOURS	ANNUAL TOTAL
<p>1. Potatoes Australia (annual)</p> <ul style="list-style-type: none"> • Project management of template design • Copy coordination and management • Layout, print production and distribution management <p>NOTE: Copy, design and printing to be outsourced</p>	<p>20</p> <p>90</p> <p>40</p>	<p>150</p>
<p>2. Eyes on Potatoes (6 times per annum)</p> <ul style="list-style-type: none"> • Project management of template redesign • Copy coordination and management • Layout, print production and distribution management <p>NOTE: Copy, design and printing to be outsourced</p>	<p>10</p> <p>120</p> <p>60</p>	<p>190</p>
<p>3. Brand identity</p> <ul style="list-style-type: none"> • Project management and coordination of designer 	<p>20</p>	<p>20</p>
<p>4. Feedback form</p> <ul style="list-style-type: none"> • Form design • Collation of responses 	<p>5</p> <p>20</p>	<p>25</p>
<p>5. Internet/extranet</p> <ul style="list-style-type: none"> • Project management of redesign • Copy coordination and management • Site updates • Data base management <p>NOTE: Copy and design to be outsourced</p>	<p>30</p> <p>25</p> <p>40</p> <p>15</p>	<p>110</p>

TACTIC/TOOL (Year 1)	HOURS	ANNUAL TOTAL
6. Grower email bulletin (quarterly) <ul style="list-style-type: none"> • Copy preparation • Distribution 	50 10	60
7. Researcher email bulletin (quarterly) <ul style="list-style-type: none"> • Copy preparation • Distribution 	50 10	60
8. SMS alerts (assumes monthly) <ul style="list-style-type: none"> • Copy preparation • Distribution and response actioning NOTE: It may be necessary to invest in specialised software to facilitate SMS distribution	10 20	30
9. Pocket guide series (assumes 4) <ul style="list-style-type: none"> • Copy coordination and management • Project management of design and printing • Distribution NOTE: Copy, design and printing to be outsourced	60 40 15	115
10. Fact sheets / practice notes (assumes 10) <ul style="list-style-type: none"> • Copy preparation • Project management of design and printing • Distribution NOTE: Design and printing to be outsourced	200 20 10	230

TACTIC/TOOL (Year 1)	HOURS	ANNUAL TOTAL
11. Annual service agents and grower conference / briefing <ul style="list-style-type: none"> • Agenda and event concept development • Coordination of papers and presentations • Venue management, attendance and follow-up NOTE: Venue and catering costs not addressed.	20 40 40	100
12. Service agents network email bulletin (quarterly) <ul style="list-style-type: none"> • Copy preparation • Distribution 	50 10	60
13. Media relations program <ul style="list-style-type: none"> • Responding to incoming media inquiries • Research, prepare and distribute issue or campaign-specific media releases. 	3 X 12 5 X 6	66
TOTAL ANNUAL HOURS – YEAR 1		1,216

Note 1: On average, one full-time employee works productively for 30 hours each week for 44 weeks of the year (taking into account leave and training). Therefore the average worker has the capacity for 1320 hours per year. This means that the preparation and implementation of tools and tactics recommended within this plan will require approximately 0.90 full time staff in the first year.

Note 2: The implementation of the tasks described above by a specialist communications consultancy would cost approximately \$158,000. This is based on hourly rates for consultant and senior consultant level, with tasks split on an 80/20% basis.

TACTIC/TOOL (Year 2)	HOURS	ANNUAL TOTAL
<p>1. Potatoes Australia (annual)</p> <ul style="list-style-type: none"> • Project management of template redesign • Copy coordination and management • Layout, print production and distribution management <p>NOTE: Copy, design and printing to be outsourced</p>	<p>N/A</p> <p>90</p> <p>40</p>	<p>130</p>
<p>2. Eyes on Potatoes (6 times per annum)</p> <ul style="list-style-type: none"> • Project management of template redesign • Copy coordination and management • Layout, print production and distribution management <p>NOTE: Copy, design and printing to be outsourced</p>	<p>N/A</p> <p>120</p> <p>60</p>	<p>180</p>
<p>3. Brand identity</p> <ul style="list-style-type: none"> • Project management and coordination of designer 	<p>N/A</p>	<p>N/A</p>
<p>4. Feedback form</p> <ul style="list-style-type: none"> • Form design • Collation of responses 	<p>N/A</p> <p>20</p>	<p>20</p>
<p>5. Internet/extranet</p> <ul style="list-style-type: none"> • Project management of redesign • Copy coordination and management • Site updates • Data base management <p>NOTE: Copy and design is to be outsourced</p>	<p>N/A</p> <p>N/A</p> <p>40</p> <p>15</p>	<p>55</p>

TACTIC/TOOL (Year 2)	HOURS	ANNUAL TOTAL
6. Grower email bulletin (quarterly)		
• Copy preparation	50	
• Distribution	10	60
7. Researcher email bulletin (quarterly)		
• Copy preparation	50	
• Distribution	10	60
8. SMS alerts (assumes monthly)		
• Copy preparation	10	
• Distribution and response actioning	20	30
9. Pocket guide series (assumes updates to 2 each year)		
• Copy coordination and management	30	
• Project management of design and printing	20	
• Distribution	7	57
NOTE: Copy, design and printing to be outsourced		
10. Fact sheets / practice notes (assumes updates to 2 each year)		
• Copy preparation	40	
• Project management of design and printing	5	47
• Distribution	2	
NOTE: Design and printing to be outsourced		
11. Annual service agents and grower conference / briefing		
• Agenda and event concept development	20	
• Coordination of papers and presentations	40	100
• Venue management, attendance and follow-up	40	
NOTE: Venue and catering costs not addressed.		

TACTIC/TOOL (Year 2)	HOURS	ANNUAL TOTAL
12. Service agents network email bulletin (quarterly)		
<ul style="list-style-type: none"> • Copy preparation • Distribution 	50	
	10	60
13. Media relations program		
<ul style="list-style-type: none"> • Responding to incoming media inquiries • Research, prepare and distribute issue or campaign specific media releases. 	3 X 12	
	5 X 6	66
TOTAL ANNUAL HOURS – YEAR 2		865

Note 1: Preparation and implementation of tools and tactics recommended within this plan will require approximately 0.65 full time staff during the second and each subsequent year.

Note 2: The implementation of the tasks described above by a specialist communications consultancy would cost approximately \$112,000. This is based on hourly rates for consultant and senior consultant level, with tasks split on an 80/20% basis.

7.0 Appendices

Appendix 7.1

Potato Growers - Telephone survey

Executive Summary

A snapshot of potato farming

A survey of potato growers across six states indicates the population of growers have mainly been in the industry for many years, and are thus likely to be middle aged or older.

About two thirds of growers undertake other agricultural activities, the proportions being about the same among 'process' growers and 'fresh' growers. The dominant activities tend to be horticulture in most states, though grain growing is prevalent in NSW and Victoria.

For two thirds of growers potatoes represent about the same proportion of their business as in the past few years, but for those who have changed, far more have decreased potatoes as a proportion than have increased.

Recall, reading levels and response to publications

Less than 40% of the growers recalled Potatoes Australia and only a third recalled Eyes on Potatoes, however awareness of this publication was much higher among 'process' growers than among the 'fresh' group.

However of those who do recall the publications about two thirds say they read most of them. 'Process' growers show higher reading levels than 'fresh'.

Both these publications are rated highly on 'usefulness' 'technical level' and 'level of detail'; and both technical level and level of detail are overwhelmingly judged to be 'about right'.

However, despite very positive ratings only about one in ten farmers has made any changes to growing practices in the past 12 months as a result of information in the publications.

Those growers who receive information about other agricultural activities overwhelmingly rate them as 'about the same' as potato industry communications.

Other methods of receiving information

Field days, printed publications in the mail and fertiliser or equipment agents are the most favoured communications channels for receiving information about the industry.

Other areas of information that might be provided

Of nine other nominated areas of information that could be supplied, all receive strong support, with updates on regulations and laws, wholesale markets and grower price trends being most favoured.

Potato industry information to other parties?

Growers strongly support the notion of existing publications or other industry communications being distributed to bodies such as government, processing companies, researchers and feed/ fertiliser suppliers.

Awareness of Horticulture Australia as the body that manages production levies

Growers show very low awareness of this role, with less than one in ten being aware of it.

Awareness of the use of the levies

Only about 20% of growers are aware of the use of the levies.

Introduction

A telephone survey of potato growers was conducted for Horticulture Australia [HA] in six states to ascertain growers' awareness of and response to various industry communications. The survey also explored other channels of information to keep growers up to date with research and development in their industry, as well as the possibility of distributing industry publications to various parties outside the industry. To provide a better understanding of the growers and their situation, some basic facts about the individual grower were also collected in the survey. A copy of the survey questionnaire is attached at Appendix 1.

Contacts for the survey were provided by industry bodies.

Characteristics of the sample

Number of interviews

The samples were determined by HA and were divided into two basic groups – growers who provide potatoes principally to the processing market and growers who principally supply the fresh vegetable market. The numbers and their break-up are shown in the following table.

	Process	Fresh
NSW	10	10
SA	5	20
WA	5	15
VIC	20	5
TAS	20	0
QLD	0	10
TOTAL	60	60

Results

The final sample collected matched the sample plan. In the results tables that follow, all show percentages, unless otherwise indicated.

Years in the Industry

	Process	Fresh	Total
Less than 2 years	0.0	0.0	0.0
2-5 years	0.0	3.4	1.7
6-10 years	1.7	3.4	2.5
11-15 years	5.0	3.4	4.2
16-20 years	8.3	11.9	10.1
More than 20 years	85.0	78.0	81.5

It is clear that while there are more ‘fresh’ growers who have been in the industry for less time than the ‘process’ group, the overwhelming picture that emerges is of people who have been growing potatoes for many years. While we did not collect information about the age of respondents, it is clear that many or most will be middle aged or older. **This could well have implications for communications, their style, content and channels used.**

Undertake other agricultural activities?

	Process	Fresh	Total
YES	61.7	65.0	63.3
NO	38.3	35.0	36.7

Only a little more than one in three farmers are solely potato growers, with the ‘fresh’ growers showing slightly higher levels of other activities.

Nature of other agriculture activities

When considering what other agricultural activities the farmers undertake, we have presented the results by state as there are some differences that reflect the state situation. As the question about this topic was an ‘open-ended’ one, we reproduce all results, grouped where appropriate and with the number of responses shown, rather than percentages. However it is clear that the great majority of growers are involved with other horticulture, principally vegetables, though there are some state differences. These results are shown on the next page.

Nature of other activities

OTHER AGRICULTURAL ACTIVITIES	State	No.
Cereal/ wheat, barley, oats/ rice, wheat	NSW	4
Vegetables/cabbage	NSW	2
Grain, peas, canola	NSW	1
Peanuts, corn, wheat, oranges	NSW	1
Pumpkin, maize, watermelon	NSW	1
Beef cattle	NSW	1
Apples	NSW	1
Other vegetables/carrots and onions/carrots/onions	WA	7
Grapes and beef	WA	1
Apples	WA	1
Onions, carrots, cattle, hay, sheep	WA	1
Onions, apples	WA	1
Vegetables/pumpkin/onions, pumpkin/14 different vegetables/lettuce, broccoli, pumpkin	QLD	6
Lucerne, pumpkin	QLD	1
Grapes	QLD	1
Bananas	QLD	1
Grain/oats/barley/cereal/wheat/wheat, lucerne	VIC	6
Cattle	VIC	2
Onions	VIC	2
Dairy	VIC	1
Lucerne	VIC	1
Assorted vegetables/Cabbage, onions, lettuce/onions/carrots	SA	7
Cherries/orchard	SA	2
Cereal/cereal, lucerne	SA	2
Wine grapes and grain	SA	1
Sheep	SA	1
Vegetables and poppies/onions and poppies/ peas and poppies/peas, carrots and poppies/beans, peas and poppies/onions, beans, peas and poppies/ peas, beans, broccoli, cauliflower and poppies	TAS	11
Other vegetables	TAS	2
Peas, carrots, cereal, poppies	TAS	1
Poppies, peas, beans, beef	TAS	1
Cereals and poppies	TAS	1
Poppies	TAS	1

While other horticultural pursuits dominate, it is notable that more farmers in both Victoria and NSW are involved in cropping activities, in various grains. It is also notable that 15 of the 20 Tasmanian farmers are active in the poppy market, a specialised industry in Tasmania.

Has potato growing as a proportion of total activities changed in the past few years?

	Process	Fresh	Total
NO	66.7	68.6	67.6
Potato growing decreased	27.8	31.4	29.6
Potato growing increased	5.6	0.0	2.8

Two-thirds of growers have maintained their proportion of potatoes over the past few years, but it is notable that the great majority who have changed have decreased the proportion of potatoes in their total activities.

Proportion of business in potato growing

	Process	Fresh	Total
Less than 50%	63.9	61.1	62.5
Between 50% and 75%	25.0	22.2	23.6
More than 75%	11.1	16.7	13.9

For about two-thirds of the sample, potato growing is less than half their business. **This is a finding that has implications for interest in and response to potato industry communications, since for most of our sample it is not their major activity.**

[Note there is an apparent inconsistency in these results when compared with the question about undertaking other agricultural activities. In that case about a third of the sample indicated that they do not undertake any other agricultural activities, whereas only about 14% of the sample say that potato growing is more than 75% of their business. However this may relate to the wording of the questions, where the item under current consideration asks about potato growing as a proportion of total business, not of agricultural activities; perhaps some farmers have other business interests.]

Recall of any potato industry communications in the past 12 months

	Process	Fresh	Total
YES	76.7	62.7	69.7
Possibly, not sure	11.7	16.9	14.3
NO	11.7	20.3	16.0

Three-quarters of the process growers have spontaneous recall of some industry communications over the past 12 months, compared with a little under two-thirds of the fresh growers. It might be noted that two-thirds of the process growers in the sample are based in Victoria or Tasmania. It is also of interest that about one in five of the fresh growers has no recall of any communications.

Unprompted recall of publications

The unprompted recall questions were only asked of those people who said they did recall seeing some industry communications in the past 12 months. However the percentages in the following table are of the total sample as this is a more realistic presentation of these results.

	Process	Fresh	Total
Potatoes Australia	41.7	36.7	39.2
Eyes on Potatoes	45.0	21.7	33.3
Other	13.3	23.3	18.3

Of the total sample of growers about 40% spontaneously named Potatoes Australia and 33% recalled Eyes on Potatoes. It is of interest that the 'process' growers show higher recall of Eyes on Potatoes.

The table below shows the numbers of growers mentioning other publications.

OTHER POTATO INDUSTRY COMMUNICATIONS MENTIONED	No.
Potato Grower	15
Farmers' magazine – Market Industry News	1
Monthly WA Newsletter	1
Chips	1
Grower	1
Idaho Potato Grower	1
Simplot	1
TSUA Focus	1

Note that at a frequency of 15, Potato Grower is recalled by more than one in ten of the total sample.

Prompted recall of publications

Percentages in the following table are of those who did **not** answer YES to the awareness of publications.

	Process	Fresh	Total
Potatoes Australia	0.0	0.0	0.0
Eyes on Potatoes	0.0	0.0	0.0

People who did not have unprompted recall showed no recall of the publications when prompted.

Amount read of each publication

Potatoes Australia	Process	Fresh	Total
Most	72.0	63.6	68.1
Some	28.0	31.8	29.8
None	0.0	4.5	2.1

Eyes on Potatoes	Process	Fresh	Total
Most	74.1	53.8	67.5
Some	25.9	30.8	27.5
None	0.0	15.4	5.0

Of those who recalled the publications, a little more than two-thirds say they read ‘most’ of the publications. It appears from the difference in the level of reading of Eyes on Potatoes that it has more to offer to ‘process’ growers, as fewer ‘fresh’ growers say they read most of the publication and a moderate proportion say they read none of it. [Note: These results should be treated with some caution, particularly the contrasts between ‘process’ and ‘fresh’ growers, as the numbers answering these questions in the sub-groups is small – in the case of Eyes on Potatoes, only 13 ‘fresh’ growers gave a rating for this question.]

Other publications	Process	Fresh	Total
Most	87.5	78.6	81.8
Some	12.5	21.4	18.2
None	0.0	0.0	0.0

It is of note that people who recalled other publications are reading more of them than either Potatoes Australia or Eyes on Potatoes. Not surprisingly the proportion of farmers who say they read none of ‘other publications recalled’ is zero. Again the sub-group numbers are quite small, so these results should also be treated with some caution.

For people who do not read industry publications we asked them the question posed in the first row of the table below.

IS THERE ANYTHING YOU CAN THINK OF THAT WOULD LEAD YOU TO READ AT LEAST SOME OF THE POTATO INDUSTRY COMMUNICATIONS?	No.
When I get time, one day I will read all of them/ no time yet	2
Only if relevant to sweet potatoes	1

Note also that the numbers of people being asked this question are small.

Response to the different publications

Mean scores [averages] on 9 point Very Good to Very Poor scale

Very Poor	<u>1</u> 2 3 4 5 6 7 8 9	Very Good
------------------	--	------------------

Potatoes Australia	Process	Fresh	Total
Usefulness	7.28	7.38	7.33
Technical level	6.48	6.86	6.65
Level of Detail	6.52	6.86	6.67

Eyes on Potatoes	Process	Fresh	Total
Usefulness	7.26	7.36	7.29
Technical level	6.59	6.91	6.68
Level of Detail	6.63	6.82	6.68

Other publications	Process	Fresh	Total
Usefulness	7.14	6.50	6.71
Technical level	6.86	6.36	6.52
Level of Detail	6.86	6.36	6.52

Those people who do read the different publications obviously like and approve of them, with ratings of all publications at high levels for the total sample and for both groups. However, Eyes on Potatoes shows somewhat lower ratings by members of the ‘fresh’ group than among the ‘process’ readers. Interestingly, this corresponds to the lower level of people who say they read most of the publication among the ‘fresh’ group, though it should still be stressed that mean scores above six on a nine point scale are still quite strongly positive.

Attitudes to Technical level

Potatoes Australia	Process	Fresh	Total
Too Low	0.0	0.0	0.0
Too High	8.0	0.0	4.3
About Right	92.0	100.0	95.7

Eyes on Potatoes	Process	Fresh	Total
Too Low	0.0	0.0	0.0
Too High	3.7	0.0	2.6
About Right	96.3	100.0	97.4

Other publications	Process	Fresh	Total
Too Low	0.0	7.1	4.8
Too High	14.3	7.1	9.5
About Right	85.7	85.7	85.7

Clearly most readers feel that all the publications they read have about the right level of technical information [above] and the level of detail [below].

Attitudes to Level of Detail

Potatoes Australia	Process	Fresh	Total
Too Low	0.0	0.0	0.0
Too High	0.0	0.0	0.0
About Right	100.0	100.0	100.0

Eyes on Potatoes	Process	Fresh	Total
Too Low	0.0	0.0	0.0
Too High	0.0	0.0	0.0
About Right	100.0	100.0	100.0

Other publications	Process	Fresh	Total
Too Low	0.0	7.1	4.8
Too High	14.3	7.1	9.5
About Right	85.7	85.7	85.7

Any changes made in growing practices, in the past 12 months as a result of communications in the publications?

	Process	Fresh	Total
YES	10.0	12.1	11.0
NO	90.0	87.9	89.0

While 'process' growers might have somewhat higher levels of reading the publications, they appear to have only about the same level of changes in growing practices as a result of the communications. Overall only about one in ten growers has made changes as a result of communications in the publications.

Which publication provided the information for changes you have made?

	Process	Fresh	Total
Potatoes Australia	3.3	5.0	4.2
Eyes on Potatoes	1.7	0.0	0.8
Other	0.0	1.7	0.8

Note: The percentages in the table above are proportions of the total sample, not proportions of those who have made changes.

Both the main publications are bringing about very little change to growing practices at present; indeed almost none in the case of Eyes on Potatoes. The following tabulation shows the details of changes made.

CHANGES TO YOUR GROWING PRACTICES AS A RESULT OF INFORMATION IN COMMUNICATIONS.	No.
Use of sprays [info from Potato Grower]	2
Unsure	1
Chemical use [info from Potatoes Australia]	1
Zinc – dilution of [fertiliser] [info from Eyes on Potatoes]	1
Irrigation procedures [info from Potatoes Australia]	1
Become more careful in looking after the ground [info from Potatoes Australia]	1

Comparisons with other publications

Do growers receive information on other agricultural activities?

For this question, we reproduce the percentages of growers who undertake other agricultural activities, followed by the percentages who say they receive information.

	Process	Fresh	Total
Undertake other agriculture - % TOTAL	61.7	65.0	63.3
Receive information- % YES, ABOVE	44.4	33.3	38.9

It is interesting to note that while about two-thirds of growers undertake other agricultural activities, far fewer say they receive information related to their other activities. Note also that the 'receive information' question was only asked of those who undertake other activities. These results are also interesting in light of the fact that for about two-thirds of growers, potatoes represent less than 50% of their business.

How other information compares with potato industry information

	Process	Fresh	Total
Superior	6.7	8.3	7.4
About the same	80.0	75.0	77.8
Inferior	13.3	8.3	11.1
Don't know	0.0	8.3	3.7

Most growers who receive information about other agricultural activities judge the information to be 'about the same' as information about the potato industry, with a slightly higher proportion among the 'process' growers feeling that way.

Interest in receiving information by different means

% YES	Process	Fresh	Total
Industry development officers	33.3	37.3	35.3
Extension officers	31.7	27.1	29.4
At field days or conferences	96.7	88.1	92.4
Agents (fertiliser or equipment agents)	85.0	74.6	79.8
Printed publications mailed to you	98.3	84.7	91.6
Internet websites	43.3	32.2	37.8
E-mail	33.3	23.7	28.6
SMS – text messages	0.0	0.0	0.0

The means by which different grower groups would like to receive information are essentially similar, with printed publications and field days/conference being the most popular, followed by 'agents'. The following tables show the proportion of people who answered 'no' or 'don't know' to these questions. It is evident that SMS is not favoured by virtually any growers and the even e-mail is not popular among two-thirds of the growers [see the 'No' responses below]. Similarly, while something around a 30%-40% of growers say they would be interested in information via a website, about half the sample respond negatively to this option.

% NO	Process	Fresh	Total
Industry development officers	43.3	47.5	45.4
Extension officers	43.3	45.8	44.5
At field days or conferences	1.7	8.5	5.0
Agents (fertiliser or equipment agents)	11.7	18.6	15.1
Printed publications mailed to you	1.7	11.9	6.7
Internet websites	45.0	54.2	49.6
E-mail	60.0	64.4	62.2
SMS – text messages	100.0	98.3	99.2

% DON'T KNOW	Process	Fresh	Total
Industry development officers	23.3	15.3	19.3
Extension officers	25.0	27.1	26.1
At field days or conferences	1.7	3.4	2.5
Agents (fertiliser or equipment agents)	3.3	6.8	5.0
Printed publications mailed to you	0.0	3.4	1.7
Internet websites	11.7	13.6	12.6
E-mail	6.7	11.9	9.2
SMS – text messages	0.0	1.7	0.8

Interest in other areas of information

% YES	Process	Fresh	Total
Wholesale markets	78.3	70.0	74.2
Retail markets	70.0	63.3	66.7
Supply chain information	70.0	58.3	64.2
Updates on relevant changes to regulations and laws	86.7	88.3	87.5
Grower price trends	81.7	73.3	77.5
Retail price trends	75.0	60.0	67.5
Benchmarking	70.0	63.3	66.7
Research on consumer markets	68.3	61.7	65.0
Competitor analysis	68.3	63.3	65.8

'Process' growers tend to show higher levels of interest in other areas of information than the 'fresh' group, although as can be seen, there are quite high levels of interest in all the topics offered. The greatest areas of interest appear to be wholesale markets, updates on regulations and laws and grower price trends. The 'No' and 'Don't know' responses are shown the next two tables simply for the sake of completeness,

% NO	Process	Fresh	Total
Wholesale markets	16.7	25.0	20.8
Retail markets	20.0	28.3	24.2
Supply chain information	21.7	33.3	27.5
Updates on relevant changes to regulations and laws	8.3	10.0	9.2
Grower price trends	15.0	21.7	18.3
Retail price trends	18.3	31.7	25.0
Benchmarking	20.0	26.7	23.3
Research on consumer markets	18.3	28.3	23.3
Competitor analysis	20.0	26.7	23.3

% DON'T KNOW	Process	Fresh	Total
Wholesale markets	5.0	5.0	5.0
Retail markets	10.0	8.3	9.2
Supply chain information	8.3	8.3	8.3
Updates on relevant changes to regulations and laws	5.0	1.7	3.3
Grower price trends	3.3	5.0	4.2
Retail price trends	6.7	8.3	7.5
Benchmarking	10.0	10.0	10.0
Research on consumer markets	13.3	10.0	11.7
Competitor analysis	11.7	10.0	10.8

Is there is value in the industry distributing existing publications or other communications to other groups?

% YES	Process	Fresh	Total
Federal government	66.7	58.3	62.5
State government	68.3	58.3	63.3
Processing companies	75.0	70.0	72.5
Researchers	73.3	65.0	69.2
Seed and fertiliser suppliers	76.7	68.3	72.5

'Process' growers see more value in communications going to other groups, particularly government, but a majority of growers support communications to all the groups nominated. It is nonetheless interesting to note [below] that about one in four growers would be against such initiatives.

% NO	Process	Fresh	Total
Federal government	21.7	31.7	26.7
State government	21.7	31.7	26.7
Processing companies	16.7	21.7	19.2
Researchers	16.7	25.0	20.8
Seed and fertiliser suppliers	15.0	21.7	18.3

% DON'T KNOW	Process	Fresh	Total
Federal government	10.0	10.0	10.0
State government	10.0	10.0	10.0
Processing companies	8.3	8.3	8.3
Researchers	10.0	10.0	10.0
Seed and fertiliser suppliers	8.3	10.0	9.2

Awareness of the name of the organisation that manages the levies on potato production

	Process	Fresh	Total
Horticulture Australia	8.3	5.0	6.7
Other Name	76.7	68.3	72.5
NO, Don't know	15.0	26.7	20.8

There is very low awareness of the role of Horticulture Australia [above], with most people offering other names. There is also quite low awareness of what happens to the levies [below]. Note that the 'fresh' producers have higher levels of 'don't know' in relation to the name of the organisation.

Awareness of what happens to these levies

	Process	Fresh	Total
Pays for R&D, Comms materials	23.3	18.3	20.8
Other	20.0	28.3	24.2
NO, Don't know	56.7	53.3	55.0

Receive information on other agricultural activities?

For this question, we reproduce the percentages of growers who undertake other agricultural activities, followed by the percentages who say they receive information.

	Process	Fresh	Total
Undertake other agriculture - % TOTAL	61.7	65.0	63.3
Receive information- % YES, ABOVE	44.4	33.3	38.9

It is interesting to note that while about two-thirds of growers undertake other agricultural activities, far fewer say they receive information related to their other activities. Note also that the 'receive information' question was only asked of those who undertake other activities. These results are also interesting in light of the fact that for about two-thirds of growers, potatoes represent less than 50% of their business.

How other information compares with potato industry information

	Process	Fresh	Total
Superior	6.7	8.3	7.4
About the same	80.0	75.0	77.8
Inferior	13.3	8.3	11.1
Don't know	0.0	8.3	3.7

Most growers who receive information about other agricultural activities judge the information to be 'about the same' as information about the potato industry, with a slightly higher proportion among the 'process' growers feeling that way.

Appendix 1: Survey Questionnaire

Good afternoon/evening, my name is _____ and I'm calling on behalf of Roger James & Associates, a research company. We're conducting research with potato growers on behalf of Horticulture Australia Limited about the information growers receive on research and development initiatives. The information gathered as part of this research will be used improved communications with growers around Australia.

We are contacting growers with assistance from the relevant State Associations. Names and contact details have been supplied directly to us and have not passed through other third parties.

Details are treated as strictly confidential, and no records of this information will be retained after this research is complete.

I'd just like to ask you a few questions which will take about eight minutes. The survey is completely anonymous, your personal details will not be recorded and responses will be grouped for analysis.
[OBTAIN CONSENT AND PROCEED]

Could you tell me whether you supply potatoes for processing or to the fresh market? [IF BOTH, ASK WHICH IS THE GREATEST PROPORTION AND RECORD ACCORDINGLY]

Process	1
Fresh	2

Could you also tell me your postcode and how many years you have been in the industry?

--	--	--	--

Less than 2 years	1
2-5 years	2
6-10 years	3
11-15 years	4
16-20 years	5
More than 20 years	6

1. Do you recall seeing any potato industry communications in the past 12 months?

YES	1
Possibly, not sure	2
NO	3

2. [IF YES] Can you name any potato industry communications you have seen in the past 12 months?

3. [IF UNSURE OR NO RECALL, PROMPT, ALSO PROMPT IF NOT RECALLED IN Q2.] Do you recall seeing?

	Q2	Q3
Potatoes Australia	1	1
Eyes on Potatoes	2	2
Other [specify] _____	3	

[IF NO RECALL OF ANY COMMUNICATIONS GO TO Q13.]

4. [FOR EACH COMMUNICATION RECALLED] Thinking about [INSERT NAME OF COMMUNICATION] would you say you read most of the information in it, some of the information in it, or none of the information in it? [CIRCLE ONE NUMBER]

	Most	Some	None
Potatoes Australia	1	2	3
Eyes on Potatoes	1	2	3
Other [specify] _____	3	3	3

5. [IF 'NONE' TO ANY COMMUNICATION IN Q4] In relation to [INSERT NAME OF COMMUNICATION], is there anything you can think of that would lead you to read at least some of it?
-
-

I'd like to ask how you feel about aspects of the different communications. For each aspect I'd like you to give me a number from 1 to 9 where 9 means VERY GOOD, 1 means VERY POOR and 5 means NEITHER GOOD NOR POOR. If you are unsure or don't know I will record a zero.

6. [ASK Q6-10 FOR EACH COMMUNICATION RECALLED] Thinking about [INSERT NAME OF COMMUNICATION] how would you rate it on the usefulness of the information you obtained from it? On the 1 to 9 very poor to very good scale, what number would you give it for usefulness?
7. Now how would you rate it on its technical level, where 9 means very good and 1 means very poor? [WRITE IN SCORE]
8. And what about the level of detail, on the same very good to very poor scale? [WRITE IN SCORE]
9. Do you think the technical level is too low, too high or about right? [CIRCLE NUMBER]
10. And the level of detail, is that too low, too high or about right? [CIRCLE NUMBER]

Potatoes Australia	Rating	Too Low	Too High	About Right
Usefulness				
Technical level		1	2	3
Level of Detail		1	2	3

Eyes on Potatoes	Rating	Too Low	Too High	About Right
Usefulness				
Technical level		1	2	3
Level of Detail		1	2	3

Other	Rating	Too Low	Too High	About Right
Usefulness				
Technical level		1	2	3
Level of Detail		1	2	3

11. In the past 12 months, have you made any changes to your growing practices as a result of information in any of these communications?

YES	1
NO	2

12. [IF YES] Can you briefly tell me what changes you have made and where you found the information? [WRITE IN CHANGES, CIRCLE ONE OR MORE NUMBERS IN THE TABLE BELOW HEADED 'WHERE']

	WHERE
Potatoes Australia	1
Eyes on Potatoes	1
Other [specify] _____	1

13. Thinking about research and development information about the industry, there are a number of ways you might receive this. Of the following list could you please tell me if you are interested in obtaining information by each means? [READ OUT, CIRCLE ONE NUMBER FOR EACH]

	YES	NO	Don't Know
Industry development officers	1	2	3
Extension officers	1	2	3
At field days or conferences	1	2	3
Agents (such as fertiliser or equipment agents)	1	2	3
Printed publications mailed to you	1	2	3
Internet websites	1	2	3
E-mail	1	2	3
SMS – text messages	1	2	3

14. In relation to communications about the industry, apart from research and development information, are there any other areas you would be interested to find out about. For example would you like to see information about [READ OUT LIST, CIRCLE ONE NUMBER FOR EACH]

	YES	NO	Don't Know
Wholesale markets	1	2	3
Retail markets	1	2	3
Supply chain information	1	2	3
Updates on relevant changes to regulations and laws	1	2	3
Grower price trends	1	2	3
Retail price trends	1	2	3
Benchmarking	1	2	3
Research on consumer markets	1	2	3
Competitor analysis	1	2	3

15. Do you think there is value in the industry distributing existing publications or other communications to other groups such as? [READ OUT CHOICES]

	YES	NO	Don't Know
Federal government	1	2	3
State government	1	2	3
Processing companies	1	2	3
Researchers	1	2	3
Seed and fertiliser suppliers	1	2	3

16. Can you tell me the name of the organisation that manages the levies you pay on potato production?

Horticulture Australia	1
Other Name	2
NO, Don't know	3

17. Do you know what happens to these levies?

Pays for R&D, Communication materials	1
Other	2
NO, Don't know	3

18. Do you undertake any other agricultural activities as a business and if so could you tell me what you do?

YES	1
NO	2

IF NO, THANK AND CONCLUDE

WRITE IN OTHER AGRICULTURAL ACTIVITIES HERE

19. [IF YES] Do you receive industry information in relation to this? [IF MORE THAN ONE ACTIVITY, ASK IN RELATION TO THE NEXT MOST IMPORTANT ACTIVITY]

YES	1
NO	2

20. [IF YES] How would you say it compares with information from the potato industry? Would you say it is:

Superior	1
About the same	2
Inferior	3
Don't know	4

21. Can you tell me in percentage terms how much of your business is potato growing?

Less than 50%	1
Between 50% and 75%	2
More than 75%	3

22. And has this changed in the past few years?

NO	1
Potato growing decreased	2
Potato growing increased	3

Thank you very much for your help.

Appendix 7.2

Content analysis – *Eyes on Potatoes*

This review is based on the December 2004 issue of *Eyes on Potatoes* and comments assume it is representative of the “style” of the publication generally, with variations depending upon available content for each issue.

Background

Eyes on Potatoes is published three times a year and circulated to growers and a range of industry participants and stakeholders including government, merchants and wholesalers, rural suppliers and chemical companies. Total distribution is 2538.

Look

Overall, the design and look of the newsletter is fairly standard two column grid, although the extensive use of colour in headings and as background screens and reverse-outs on stories creates a colourful but confused look. The heavy use of colour in the editorial is quite distracting to the reader’s eye, and in some instances, makes it difficult to distinguish between articles and advertisements, the latter all being full colour.

While there appears to be a style for main headings on stories, there are contradictory examples of a reverse heading and the use of different colours in headings. These techniques are used to break up and brighten up the pages, but there are limitations as to what can be done with the two column format. In the eye of this reviewer, the colour in the articles detracts from the newsletter’s readability.

There is confusion in formatting, with Page 1 and part of Page 3 in four column grids, and the rest of the publication two columns.

Where stories flow over several pages the bridging mechanisms are not strong and some pages appear to “hang” with no sense of connection to the previous or the following pages. While the content should draw the reader from one page to the next in long articles, visual connections are important and would overcome this problem.

Generally, the two column format and layout gives the publication the look of an information brochure rather than a newsletter.

Establishing a heading style, creating logos and a look for regular sections (eg AUSVEG Briefs, APIC Briefs) and limiting the use of colour in the headings and in background screens on articles would create a consistent and less-confusing look.

Content

Is it relevant?

Overall the information in the articles appears to be relevant to the potato industry and therefore should be of interest to the targeted readership and generally in line with the content aims set down in the publication guidelines. The edition reviewed carried information on:

- Industry issues (eg. the role of biosecurity, an update on genetic engineering as it affects potatoes);
- Reports from industry body events and meetings;
- A business profile;
- Reports on R&D programs; and
- Round-ups from the states.

(See attachment for detailed listing)

The range of topics covered – including R&D projects, industry issues and industry news - suggests *Eyes on Potatoes* has something of interest to its readers whether they are large or small growers, in the fresh or processor sectors, or are members of the various other groups on the distribution list (eg. government, merchants, and rural suppliers).

Does it promote the R&D message?

Apart from the specific feature on the processing R&D program and the listing of latest R&D reports, there is no overt pushing of the R&D message.

Is it easy-to-read?

Without the benefit of reader feedback, it is difficult to determine whether readers find the articles easy-to-read and easy-to-understand. However, as an observer, the articles do not appear to be written in technical or bureaucratic language and are generally easy-to-read, even for a non-industry reader.

The fact that many of the stories are prepared by, and attributed to, government officers gives the newsletter a sense that it is a departmental communication. While there are reports and items from potato industry officers there is only one article from, or about, growers or processors themselves.

There is probably a fair balance between news and feature articles, though it can be expected the industry readers are time-poor and may prefer more, short, relevant and newsy articles, perhaps with directions on where to more detailed information.

Reader engagement

There appears to be a low level of direct involvement of readers (there is only one story directly about a grower, plus the competition inviting readers to enter, in this issue). This gives the impression of little participation by, or engagement of members in compiling the publication, particularly growers and processors.

During a meeting with Cathy Sage, who edits *Eyes on Potatoes*, it was indicated that the main conduit for reader feedback was through Leigh Walters during his direct contact with industry members. The other guide to the successful "cut-through" was the fact that advertisers continue to advertise. There appears to have been no readers' surveys and there are no facilities for on-line surveys as the website has not yet been commissioned.

Other observations

While advertisers seek the positioning on the right hand pages of publications it is surprising to see pages 7 and 9 carrying full page advertisements rather than editorial in a publication of this size.

While between this publication and *Potato Australia*, industry members are communicated with quarterly, they realistically only receive *Eyes on Potatoes* three times a year, with a large gap between the June and December editions. This must make it difficult to create reader expectation and loyalty. Regular, frequent information flow is the best way to achieve these.

The "Chips" stapled insert has not been assessed in the same way as the newsletter itself, however, it is noted it carries a large number of mostly brief items on a wide range of disease, production and industry issues drawn from a variety of sources.

Eyes on Potatoes story list (Dec 04 edition)

P1

Biosecurity – general information about planning to protect the agriculture industry, particularly potatoes.
Field guide to potato crop problems.

P2 - Full page advertisement

P3

Biosecurity story cont'd – refers to the role potato growers can play.
Overview of role of Plant Health Australia.

P4

Editorial plus listing of contributors.

P5

Story about Mondello Farms – potato producer – shows highly sophisticated farmer.

P6

Genetic engineering story focusing on potatoes.

P7 – Full page advertisement

P8

APIC Briefs – A series of briefs from the Australian Potato Industry Council meeting with AUSVEG, included reference to annual general meeting, election of councillors an item saying that AUSVEG had indicated it intended to withdraw from APIC. (This seems low level coverage of a national industry event)

P9 – Full page advertisement

P10, 11, 12 & 13

Story on “Most ambitious research program ever embarked on by the Australian processing potato industry”. With snapshots of what the program will be made up of. Ran over four pages with little sense of flow.

P14 – Full page advertisement

“Chips” stapled insert

P15, 16 & 17

AUSVEG Briefs

P18 & 19

A series of stories on people and state matters – each story presented with a different coloured headline but virtually the same font size, so no sense of priority.

P20

The story behind Potato 2005 – about the national conference.

P21

Potatoes and Penguins – more about the national conference but no sense of connection to the previous page.

PCN Update.

P22

Potato 2005 Emmeloord international exhibition and trade fair.

Listing of “Latest R&D Reports”.

Levy payers’ meeting.

P23

Communication Update – a series of briefs about communications over the year.

P24

Story of potatoes book.

Seed Potato Advisory Group meeting report briefs.

P25

Potato IAC Update report from Sydney meeting.

P26 & 27

State round-up with reports on weather and crop influences etc plus issues facing the industry in each state.

P28 – Full page advertisement

Content analysis – *Potato Australia*

This review is based on the September 2004 issue of *Potato Australia* and comments assume it represents the established style and content of the publication generally.

Background

Potato Australia is published once-a-year and is circulated to growers and a range of industry participants and stakeholders including government, merchants and wholesalers, rural suppliers and chemical companies. Total distribution is 2538.

Look

Potato Australia has the distinct feel of an annual report. It has a clean and uncomplicated look, with a consistent style for headings and picture size.

Colour is used in headings but in a constrained way and there is limited use of coloured screens and backgrounds to highlight stories and tables.

Content

Is it relevant?

Generally, the information appears to be relevant to the potato industry and therefore should be of interest to the targeted readership.

In keeping with the “annual report” style, the publication is segmented into:

- News;
- HAL information (including R&D levy and voluntary contribution projects); and
- Technical information (on issues such as crop management, pest, disease and weed management and seed development - this section is colour-coded and “tabulated” for ease of use).

Does it promote the R&D message?

There is a considerable amount of space dedicated to R&D programs and logos relating to the grower levy and the voluntary contributions are displayed on relevant articles to reinforce the underlying messages about the R&D programs funded by these sources. These are used subtly but effectively throughout.

Is it easy-to-read?

There is a mix of language used in the publication, with the “news” typically presented in an easy-to-read style and the “technical” material containing appropriate detailed language. The mix of information means it can be read for news or retained for future reference.

There is a wide range of contributors from both government agricultural agencies and the industry, so there is a range views and degree of

technicality in the articles, which have been edited to ensure there is an overall, consistent style to the information.

Reader engagement

Apart from feedback provided to Leigh Walters during his direct contact with industry members and by the fact that advertisers continue to advertise, there are no other guides as to reader satisfaction with this publication. While the introduction of the proposed website would provide an avenue for feedback, other alternatives would be to provide a feedback sheet in the publication for faxing or posting back to the publisher, or to establish a telephone feedback line.

Appendix 7.3

Telephone Interviews

Potato IAC members in Australia – Processed and Fresh. General Findings

Interviewees

4 Growers from Fresh Potato Industry
4 Growers from Processed Potato Industry
Representative from Arnotts
Chair of Western Potatoes – fresh and potato grower.

Key Points

- Growers are bombarded with publications from many sources including government, HAL, AUSVEG, and other industry groups and tend not to read them because they are time poor and problem focused.
- Growers are very unsatisfied with the R and D, believe up to 90% of the information is irrelevant to them, and some do not know what their levies are being spent on.
- Two-way communications with the growers through a central communications structure should resolve many of the issues of over-information and give HAL a significant presence among growers, allowing growers to 'have their say' and lead to higher satisfaction levels.
- The internet could be a rich source of information for growers to 'search' for information but it is currently disorganised and many growers are computer illiterate
- There needs to be more information about the market and the retail sector to empower growers with the market knowledge that will help them to plan for trends and achieve greater returns.
- The communications problem is two fold. Growers feel unsatisfied with the information they receive and don't feel like they can find what they are looking for. They stop being interested in the material and become disengaged with the industry associations. The fragmented structure of the industry, each with separate information to get across to the grower, adds to this disenchantment and doesn't allow growers to have their say on what they want to see.

Findings

Face to Face Communications

Almost all of the interviewees thought that face to face communication was the best way of reaching farmers on the ground. However, there was a difference in opinion as to how often farmers should be communicated with face to face and in what format. The following suggestions were made:

- Face to face contact at least every 4 weeks
- Regular information nights and meetings
- Regional meetings once or twice a year.

However some were of the view that face to face meetings were not relevant to an industry as big as the potato industry. They felt that farmers are too busy for information nights and they are too expensive to facilitate.

Publications

Again, there was more conflict over whether publications were effective. Most of the interviewees mentioned that growers get bombarded with information and don't end up reading it because there is too much.

Growers tend to be time poor and therefore cannot afford to wade through this information to find the parts that are relevant to them. They don't seem to be good at filing the information and therefore can't find it later when they need it.

A select group felt that publications were good because it gives people a physical thing to read and on their own time. Many of the interviewees believe that growers who don't read the publications are doing themselves a disservice. Those who seek out the information are going to be around in the longer term, while the others who rely on the things they get and don't pay attention to it will suffer.

Some suggested that publications should be short, sharp and to the point. They should summarise the information that is available rather than providing large volumes of knowledge. Growers tend to seek this out if they need it and some suggest that an online library accompanied by an annual index would be best for this.

Technology – Internet and Email

The use of internet and email received a mixed response from interviewees. Most could see the benefits of online catalogues to find relevant information instantaneously and believe that if growers had better access to computers and weren't as computer illiterate, this could be a valuable way forward. There also needs to be a solid co-ordination of this information. Younger farmers will really benefit from online materials.

However, many thought that email was a poor way to communicate with growers as only a limited audience receives email. Regular mail was mostly preferred.

The interviewee from Arnott's believed that fax was a good method of communication because most growers have a fax machine and like receiving a hard copy of important information.

Research and Development

Interviewees reported that growers were unsatisfied with the R and D being undertaken. Some of the reasons for this were:

- 90% of the projects are not relevant to them either regionally or by sector.
- They don't feel like they have any say in the R and D projects being undertaken.
- Some of the projects are seasonal, becoming irrelevant by the time they are completed.

Some of the growers are saying that R and D should be scrapped, according to one Victorian interviewee, and that they don't see any value for their money because for all of its costs, R and D isn't really getting growers anywhere.

Most of the growers don't actually know what their levy is spent on.

On the flip side – some interviewees mentioned that the growers need to become less dismissive of the current information and start reading; otherwise they are at risk of losing their businesses.

Content of Information

There is a strong sense from the IAC members that there is a gap in the information that potato growers received compared to other industries.

They think that there should be more information on the retail sector and the market. This includes average pricing, current trends, information about the relationship to the market and oversupply.

All interviewees think that growers need to understand market trends in order to run their businesses better.

Communications structures.

Nationally, the industry needs a more structured communications network. Things need to come out of a central place and some suggested that there should be representatives in zones that manage the information. Currently, are sub groups that look after certain regions or groups and the central messages can get lost. The interviewees suggest that this might be a reason for HAL's the lack of presence among growers.

Many of the interviewees told us that growers really wanted to be heard and voice their opinions on the R and D that should be done.

Two-way communication with growers is essential and a proper communications structure with strategic and targeted meetings and publications should manage this.

Other comments

Growers need a political arm – they need to have protection and representation so that they get a decent price for their product and a healthy return.

The WA interviewee suggested that to increase the presence of HAL among growers they could:

- Do more through AusVeg
- HAL to finance a communications network
- Create zones that have representatives

Appendix 7.4

Industry advisory council consultation

In September 2005, Socom facilitated two workshops with members of the process and fresh potato growers' industry advisory councils (IAC).

Each group was asked to identify what they felt should be the objectives of a new potato industry communications plan. Following identification of these objectives, the groups was split up and asked to identify for each objective:

- Target stakeholders;
- Existing communications activities to retain;
- Existing communications activities to changes; and
- New idea which might assist achieve the objective.

This paper summaries the result of both sessions.

Process grower summary

Objective 1: Ensure communications increase profitability by encouraging the adoption of best management practices.

Original: "Apply / Adopt best management practices"

Stakeholders:

- Growers
- Processors
- Consultants
- Suppliers
- Researchers
- General Public

Activities to keep:

- Eyes – Publications – x2 +1
- Extension staff
- "Chips" (NZ)
- Reference material for all – to hard copies

Activities to change:

- Get internet up and running

Ideas:

- Use 'AGFEST' as tech transfer
- Link our outcomes with GLOSSAL Potato News

Objective 2/3:

Improve awareness of the linkages between potato levy and R&D investment

Improve confidence in potato levy investment, to ensure continuation R&D program.

Original: "Linkage from Levy to R&D outcomes Connected/confidence in the R&D program to further develop it (More \$)."

Stakeholders:

- Growers
- Researchers
- Processor field staff
- Government

Activities to keep:

- Using existing forums for tech transfer

Activities to change:

- Make more connections/recognition of levy to R&D outcomes
- Re-enforce source of funding at company forums eg variety trials

Ideas:

- Use on-farm demonstrations

Objective 4:

Improve the overall quality and timeliness of information material.

Stakeholders:

- Editor
- Growers
- Service industries
- Sub-program leaders

Activities to keep:

- Proof reading

Activities to change:

- Reduce volume of info
- Bigger print

Objective 5: Create and maintain an accessible and comprehensive information archive.

Original: "Information is available when needed (Accessible - to be easy > time - to stakeholders. Relevance to today's problem)"

Stakeholders:

- Growers (& managers)
- Processors
- Service providers (consultants)
- Research org.

Activities to keep:

- Publications
- Internet
- Reference books
- Growers talk with consultants or see providers > access to consultant

Activities to change:

- More use of internet with reference capacity
- Management strategy – synopsis > kept up to date

Ideas:

- Improve access to consultants
- Keep management strategy/synopsis up to date

Objective 6: Increase communications between researchers and raise awareness of research opportunities in this sector.

Original: "Internal communication of researchers – one team one goal (Internal communications strategy – 7 & 8)"

Stakeholders:

- Researchers direct
- Researchers outside
- PPIAC

Activities to keep:

- Leigh's work – internal communication list, email update (chat board), tech planning meetings, planning meetings, program coordinator

Activities to change:

- Recognise loyalty to PPIAC rather than organisation
- Agency > agency openness between groups

Ideas:

- Co-dependence between groups recognised and upheld (carrot? stick?)

Objective 7: Retain and attract young/graduate researchers to the sector

Original: "Research capability – building & maintaining"

Stakeholders:

- Growers
- Processors
- Research org.

Activities to keep:

- Put some money into it
- Having them as part of 'the team'

Activities to change:

- Plan to bring them through to leaders
- Exchange program with o/s links

Ideas:

- Plan to retain best minds working in the industry

Fresh grower summary

Objective 1: Ensure communications increase profitability by encouraging the adoption of best management practices.

Original: "Achieve better practices to ensure profitability / sustainability / survival"

Stakeholders:

- Growers
- Consumer
- Financiers
- Advisors – accountants, independent financial advisors
- Service providers – consultants
- Governments
- Researchers
- Industry bodies – allied retailers/wholesalers

Activities to keep:

- Potato Australia
- EOD
- Website
- Conference
- CD's
- Meetings

Activities to change:

- Specific tools (above) to broader audience
- Specific measures for growers and others

Ideas:

- Field days
- Indexing/search
- Industry category management
- Specific info for specific targets

Objective 2: Ensure that research program is responsive to grower needs.

Original: “Make research responsive to growers needs”

Stakeholders:

- Growers
- Researchers
- Retailers/wholesalers
- R&D decision makers – IAC, HAL, PIBs, IDOIs

Activities to keep:

- Magazine
- Personal contact
- IAC – growers input into R&D decision making

Activities to change:

- Improve R&D decision making at state level

Ideas:

- Increase face to face focus on National Potato Industry
- Link retailers input into R&D

Objective 3:

Improve awareness of the linkages between potato levy and R&D investment

Improve confidence in potato levy investment, to ensure continuation R&D program.

Original: "Demonstrate ROI – re: levy to ensure construction and improvement of R&D"

Stakeholders:

- HAL
- Ausveg
- Growers
- Government
- Researchers
- Retailers

Activities to keep:

- HAL ROI document
- National publications
- Advisory committees

Activities to change:

- ROI R&D analysis results
- More detailed economic analysis

Ideas:

- Two-way communication – R&D providers & growers
- Need tools to demonstrate ROI
- Analysis of R&D economic
- Contribution of Potato Industry to economy

Objective 4: Improve customer understanding of the problems facing the sector and steps employed to address.

Original: "Educate customers about problems facing sector to ensure increased profitability (across producer > customers > retailer)"

Stakeholders:

- Wholesalers

Activities to keep:

- *Not completed*

Activities to change:

- *Not completed*

Ideas:

- Product issues
- Both ways
- Forecasting supply
- Quantity vs quality
- IDO / Go National

Objective 5: Improve customer understanding of the problems facing the sector and steps employed to address.

Original: "Educate consumers (as Objective 4) – adoption – re: original problem"

Stakeholders:

- Everyday people

Activities to keep:

- Labelling
- 5 & 2 veg advertising
- Private ad/promo work
- AusVeg assurance

Activities to change:

- Labelling
- AusVeg involvement (political)

Ideas:

- Marketing (levy)
- Health programs involvement
- IDO/EO National

Objective 6: Provide a voice on significant policy and regulatory issues impacting sector.

Original: "Impact on significant government policy/reg. (ie OH&S, Worksafe etc, transport, Awards)"

Stakeholders:

- Government department
- Regulators

Activities to keep:

- NFF
- State organisation eg. DPI, SAFF

Activities to change:

- National Veggie input

Ideas:

- Voice ideas on decisions made by government
- A body to take on issues
- IDO/EO National