Report: NZKGI Performance Review Survey (2020)

Contents

1. Background

With the NZKGI levy consultation to commence in 2023, it was decided at the 4 November 2020 Executive Committee meeting to collate Grower opinion on NZKGI to ensure that the organisation is accountable and placing the right level of focus on topics to maximise value to growers. The aim of the survey was to gain an insight into the following:

- Identify NZKGI's KPIs in the eyes of growers and further investigate:
  - How is NZKGI serving growers: Are there areas growers find important which are not being addressed?
  - How is NZKGI's performance: Are there areas for improvement?
- Is there a need for increased operations by NZKGI and could this impact on the levy rate?
- Are the organisations priorities correct?
- How effective are governance, Forum representation and operational aspects of the organisation in the eyes of growers?

In order to answer these questions, the Communications Manager recommended a short survey in order to gain representative results over the coming years. It was stated that a representative sample is needed to draw conclusions.

2. Survey Representativeness

The total grower population is 2,792 which means that a sample size of 338 responses were required to obtain a sample significance with a 5% margin of error and a 95% confidence level. Taking into account that NZKGI has an email distribution list of 2,082 growers, a sample size of 325 responses would be required to obtain a sample significance with a 5% margin of error and a 95% confidence level.

It should also be noted that the commentary in the results below are not representative of the response population, but they are a narrative(s) from a group within the response population.

3. Survey collection

Total responses

Responses were collected between 13 November 2020 and 17 December 2020. Growers were encouraged to participate in the survey via the Weekly Update newsletter and Forum members were asked to contact their growers to encourage them to participate.

A total of 400 responses were received, of which 273 were fully completed, and 127 were partially completed surveys. Of the 273 fully completed surveys, 21 were not growers and so were directed to end the survey meaning that 252 respondents completed the survey.

The survey question with the highest response received 273 answers and the least received 60 answers resulting in a margin of error of between 6 – 13% with a 95% confidence level.

Responses by region

Answered: 252, Skipped: 21

For all regions, the response rate based on the number of email addresses per region fell below the sample number required for the 95% level of confidence with a 5% margin of error.

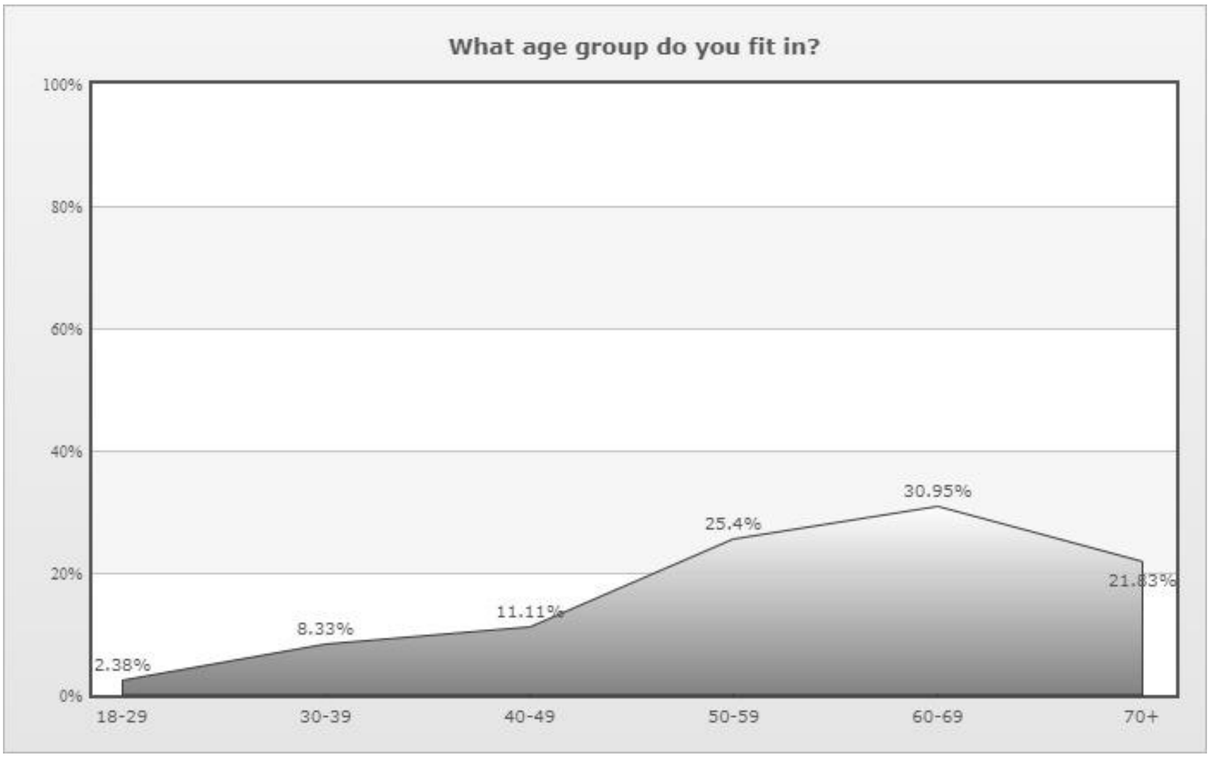
Region	**Response as % of total survey respondents**	**Number of respondents**	**Email addresses available**	**Response rate as % of available email addresses**	**Number of email addresses required to be significant**
Northland	12	30	100	30	80
Auckland	9	22	109	20	86
Waikato	7	18	97	19	78
Waihi/ Coromandel	4	10	51	20	46
Katikati	12	29	255	11	154
Tauranga	15	37	490	8	216
Te Puke	20	51	605	8	236
Whakatane	9	23	94	24	76
Opotiki	12	30	104	29	83
Poverty Bay	6	15	44	34	40
Hawkes Bay/Lower North Island	3	8	70	11	60
South Island	6	15	63	24	55
TOTAL		**288***	**2,082**		

**252 responders answered this question and multiple answers were allowed.*

Responses by age

Answered: 252, Skipped: 21

The ages of survey respondents could be representative of the grower population. 53% of growers are thought to be 60+ and 53% of survey respondents are 60+.



Response by variety grown

Answered: 252, Skipped: 21

Variety	Response %	Response total	Response total as %
Green	76	192	46
Gold	81	204	49
Red	12	20	5

If seen by volume, the green/gold split between respondents was similarly representative to the industry.

Responses by orchard size

Answered: 252, Skipped: 21

Respondents stated they had the following orchard sizes

Size (ha)	Response %	Response total	Industry average	Difference
0-2	14	36	23	-9
3-5	28	70	48	-20
6-10	19	48	22	-3
10+	39	98	7	+32

There was a large discrepancy between the industry orchard sizes and respondents. The survey was dominated by responses from growers of large orchards and not enough responses from growers of smaller orchards to be representative of the grower population. However as growers of larger orchards pay more levies, these responses by orchard size would be more aligned to the votes that NZKGI receives in a levy year (more hectares, more votes).

4. Results: Executive Summary

NZKGI's KPIs in the eyes of growers

Generally there is a positive resonance about NZKGI's performance (Q11). Responses show that NZKGI's portfolio areas are important (Q2) and that NZKGI are working well in these portfolios (Q3).

- 77% think NZKGI has performed well or reasonably well over the last 5-years
- Over 92% stated NZKGI's portfolio areas are very important or somewhat important.
- Over 84% strongly agree or somewhat agree that NZKGI is working well in its portfolios.

How is NZKGI serving growers: Are there areas growers find important which are not being addressed?

Themes mentioned by respondents included NZKGI's independence from Zespri (i.e. not being located in the Zespri building, holding 'Zespri to account' etc.) as well as to be able to monitor the industry for growers (Q2).

How is NZKGI's performance: Are there areas for improvement?

62% of growers felt that there is room for more work to be undertaken with central government (Q4).

Due to 51% of respondents having never attended the NZKGI AGM and/or read the NZKGI annual report, the value of the cost of these two areas could be reconsidered.

Is there a need for increased operations by NZKGI and could this impact on the levy rate?

Growers generally feel that the current levy rate provides value for money (Q9) and should stay at this rate (Q10). Several respondents stated that an increase in trays will cover increased activities (Q10). However this could be considered misleading and requires further discussion beyond this report.

- 70% think the current levy gives them value for money
- 68% think the levy should remain the same

Are the organisations priorities correct?

Survey responses show that NZKGI's current portfolio areas are all considered important (Q2). Four respondents suggested that NZKGI place a higher priority on its independence from Zespri as well as to be able to monitor the industry for growers (Q2).

How effective are governance, Forum representation and operational aspects of the organisation in the eyes of growers?

NZKGI is seen to be working well in its portfolios (Q3). The communication received from NZKGI is sufficient (growers don't receive too little, nor too much communication) (Q6). Growers also generally felt that they are represented by their representatives (Q8).

- Over 84% strongly agree or somewhat agree that NZKGI is working well in its portfolios.
- 86% find the information they receive from NZKGI is sufficient
- 65% strongly or somewhat agree their representative can present their views at Forum.

Raw results

Question One: Are you a Grower?

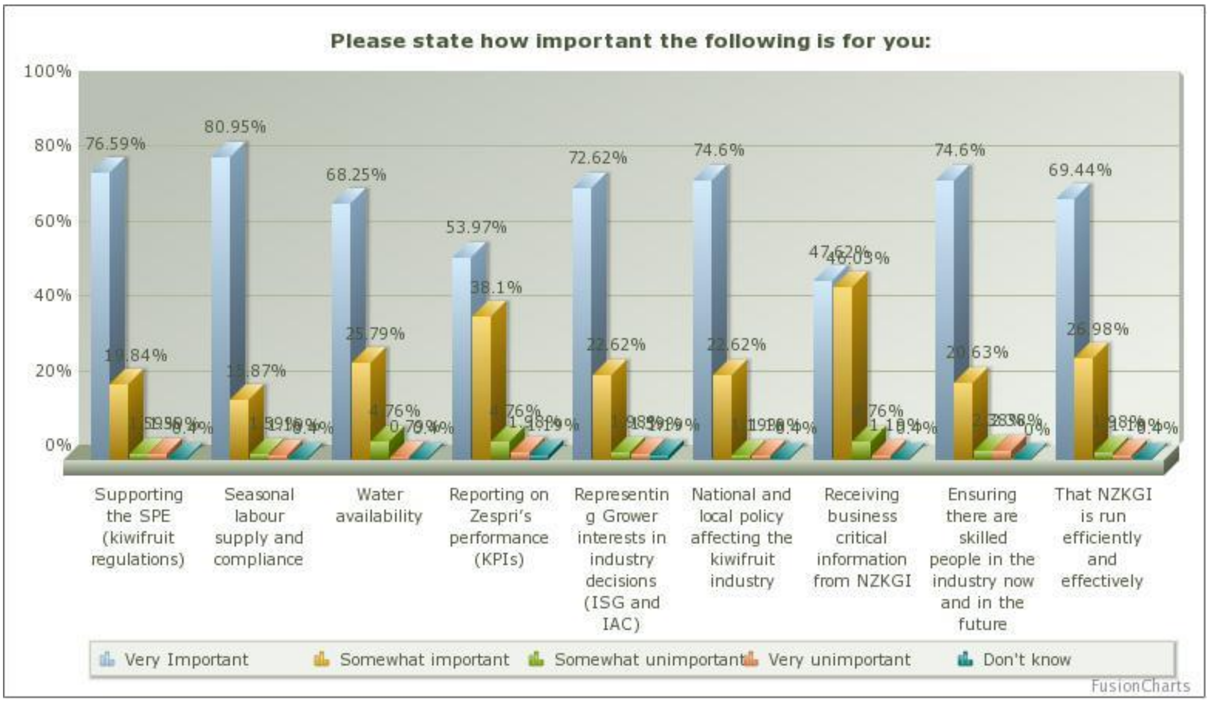
Answered: 273, Skipped: 0

The survey was designed to filter out those who didn't belong to the target group. The 8% who answered 'no' to question one could not answer further questions.

Question Two: How important are NZKGI's work areas?

Answered: 252, Skipped: 21

Question two outlines the major areas of NZKGI's work from each of the portfolios.



The responses show a high proportion of importance is placed on each area, indicating the areas NZKGI works in are seen as important by respondents.

While receiving business critical information is seen as very important by 47% of respondents and somewhat important by 46%, 86% state that the information they currently receive from NZKGI is sufficient.

Reporting on Zespri's performance is seen as very important by 54% of respondents and somewhat important by 38% of respondents. This was further reinforced by commentary in the feedback mentioned the continued need for monitoring of Zespri.

Commentary (39 responses): Major themes include the need for NZKGI to be independent from Zespri and represent all Growers, with emphasis placed upon varieties and orchard sizes. There were also multiple comments about NZKGI needing to monitor Zespri (e.g. overseeing policies and operations) and post-harvest, suppliers and contractors (e.g. benchmarking). There were a wide range of additional comments about areas that growers find important, such as pastoral care. However, NZKGI already works in these areas to a greater or lesser extent.

Recommendations:

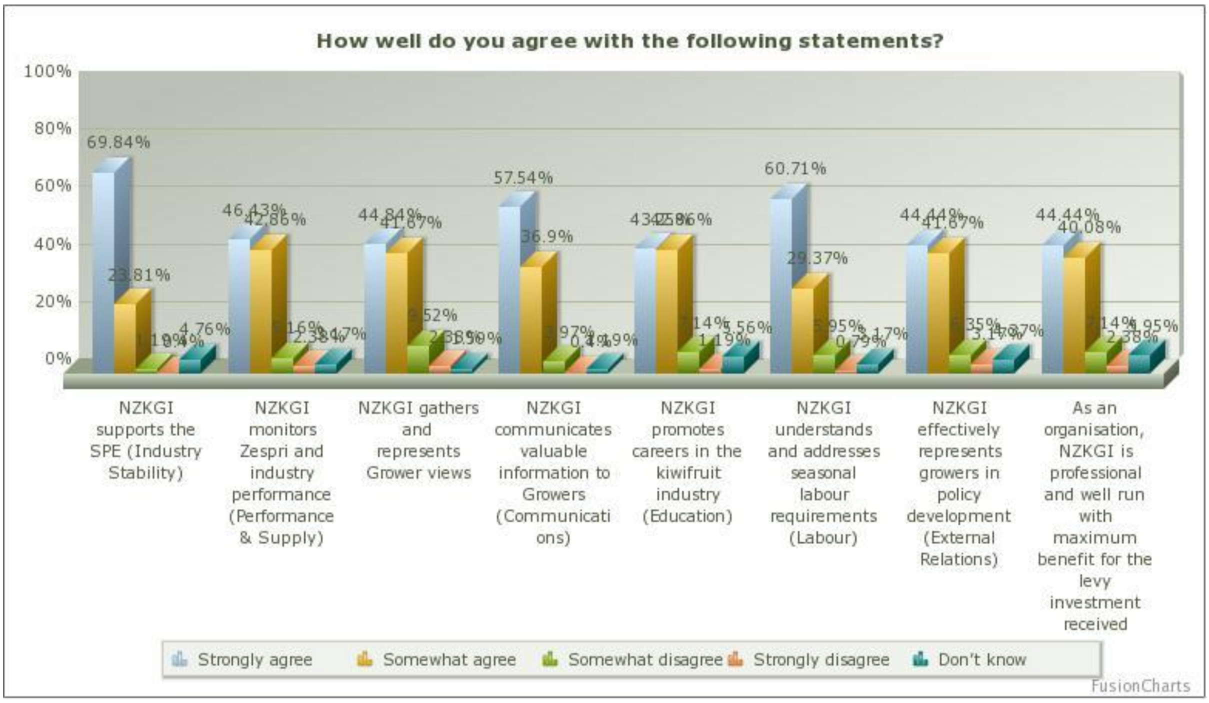
The results indicate that NZKGI is working in areas seen as important by growers. However the results do not rule out that there are additional areas which require more emphasis. Further investigation in these areas could be conducted by adding further questions to the 2021 NZKGI Performance Surevy.

An additional question could be asked to growers ‘what areas does NZKGI need to work on more which may require an increase to the levy?’ This would provide direct support for a levy increase.

Question Three: Portfolio performance

Answered: 252, Skipped: 21

Question three carries on from question two to investigate how well each of NZKGI’s portfolios are working in the eyes of the respondents. An additional section ‘NZKGI gathers and represents Grower views’ was incorporated to ascertain how well Forum members are working on growers behalf.



The results for all of the portfolios lean heavily towards the positive side for each of the portfolios. Over 84% strongly agree or somewhat agree that NZKGI is working well in its portfolios with support for the SPE being particularly high. The positive result for the section on ‘NZKGI gathers and represents Grower views’ could also indicate that respondents are generally comfortable how they are represented. However, the results could be biased as growers received the invitation to participate in the survey from their Forum members.

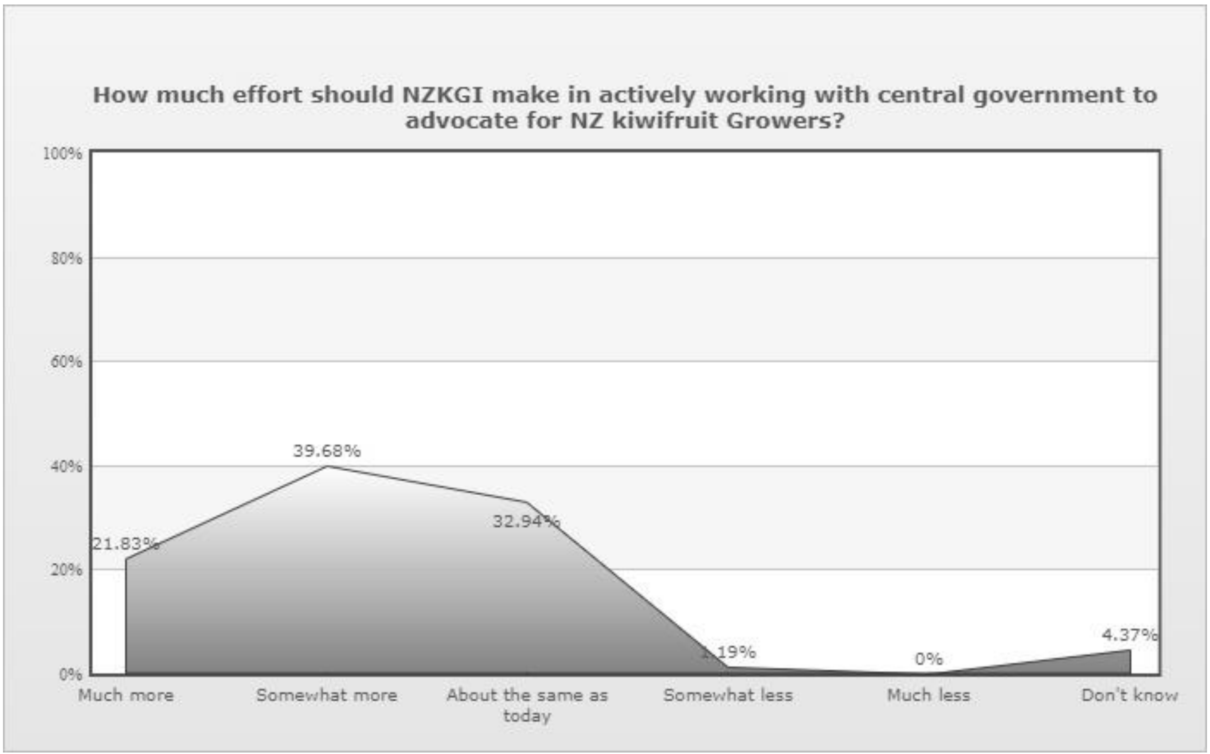
Commentary (37 comments): A large proportion of the commentary critiqued the closeness of NZKGI and Zespri and NZKGI’s ability to monitor Zespri. Another major theme was that NZKGI has lost its focus on representing growers.

Recommendations: n.a.

Question Four: NZKGI work with central government

Answered: 252, Skipped: 21

Question four tests the view that NZKGI needs to work more with central government and asks respondents how much effort should NZKGI make in actively working with central government to advocate for NZ kiwifruit growers.



Respondents heavily agreed with this perspective which provides a (unrepresentative) mandate for NZKGI to expand their activities to work more with central Government.

Commentary (39 comments): Commentary is generally supportive of NZKGI working further with central Government but also recognises that HortNZ is also working in this area. Talks with Government on the topic of labour shortages was mentioned several times as being important.

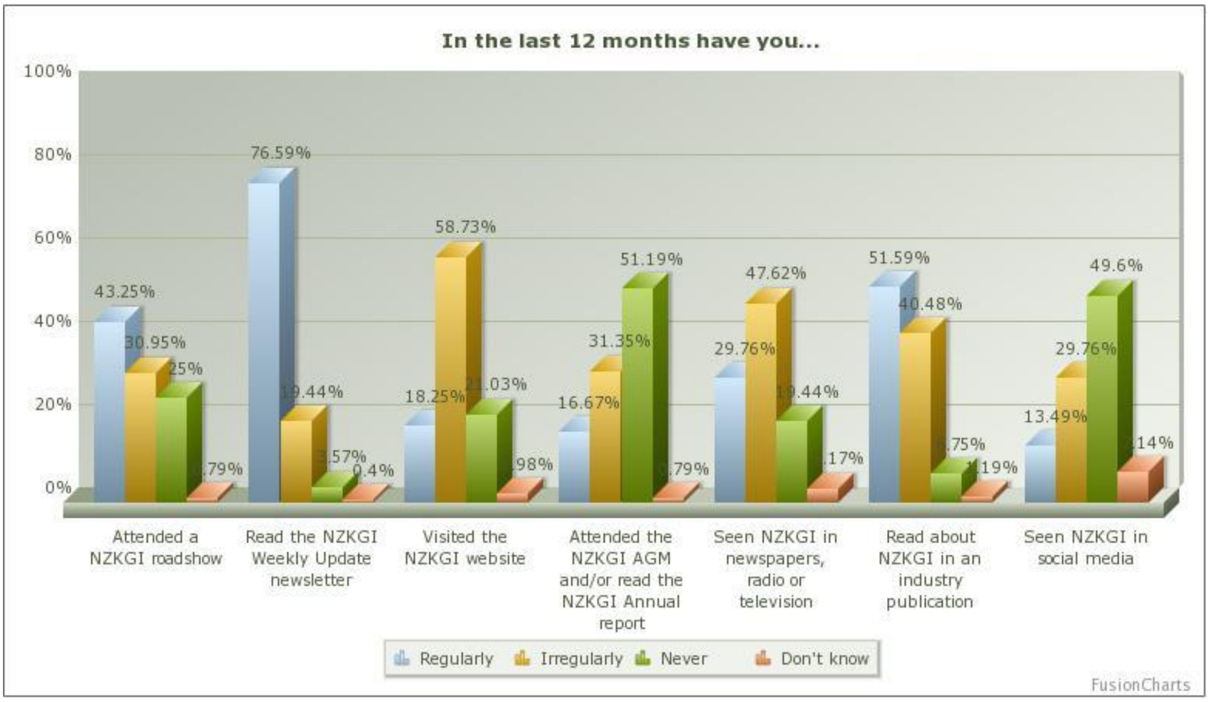
Recommendations:

These (unrepresentative) results could be used in discussions to support a mandate for NZKGI to work more with central government.

Question Five: Communications from NZKGI

Answered: 252, Skipped: 21

This question examines which communications respondents receive from NZKGI allowing the potential for more emphasis to be placed on particular mediums. A bias must be recognized that the survey was advertised in the Weekly Update which may result in a higher number of responses for this medium.



The response shows that the Weekly Update newsletter is a key source of information from NZKGI, followed by industry publications and roadshows. The least sourced information is from the NZKGI AGM and annual report as well as social media.

Almost half of responders stated they hadn't attended the NZKGI AGM and/or read the NZKGI Annual report. The 2020 AGM was held online and was a good test to see if the traditionally physical meeting was restrictive to people who would have to travel to attend. 49 growers were present at the 2020 online AGM while 74 growers were physically present at the 2019 AGM. Further, the NZKGI annual report is the one piece of collateral sent via post to all growers. Due to the cost of the preparation and postage of the report, the results that up to half of responders have not read it should be discussed further.

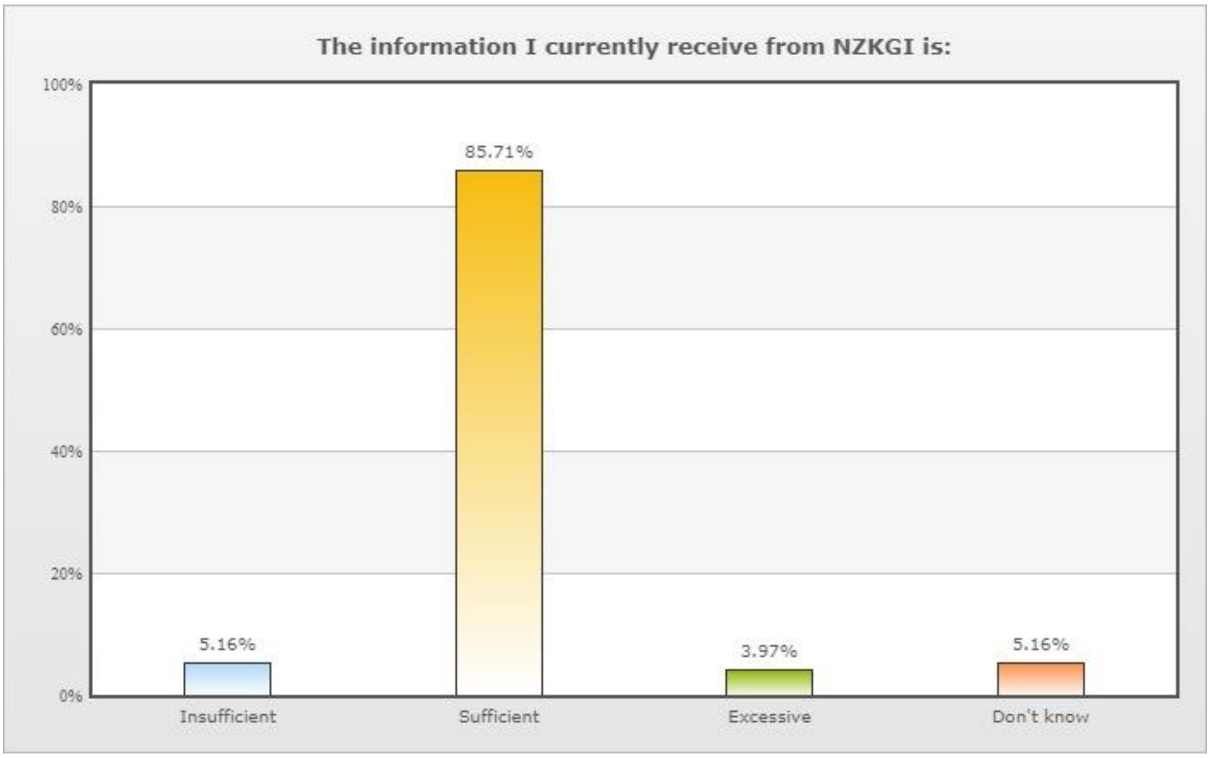
Commentary (24 comments): One theme in the commentary from some of the responders was that they don't use social media, which is probably reflective of the grower demographic.

Recommendations: If the results are to be taken as representative and at face-value, the Weekly Update should continue to remain a key communication mechanism for NZKGI as a source coming directly from NZKGI and unedited by journalists of other publications. It is also pleasing that a number of respondents have read about NZKGI via industry publications or attended roadshows. The upcoming refresh to the NZKGI website will allow the opportunity for more traffic. Also, as mentioned above, a reassessment of the cost benefit of the annual report could be made and, due to grower demographics, the level of focus placed in NZKGI social media should be retained.

Question Six: Sufficiency of information received from NZKGI

Answered: 252, Skipped: 21

Continuing the theme of communications, question six aims to reveal if the level of communication is sufficient for respondents.



The results are pleasing as growers should not be overwhelmed with excessive communications, nor too little information from NZKGI.

Commentary (14 comments): Most feedback surrounded the Weekly Update being a useful resource. There was some commentary questioning if the newsletter should be weekly or less.

Recommendations:

A question for a future survey could ask if the communication growers receive directly from their representative is sufficient.

Question Seven: Respondents regional/supply entity Forum member

Answered: 252, Skipped: 21

This question questions the engagement and grower interaction with representatives.

72% of respondents stated that they know who their regional or supply entity Forum member is and how to contact them.

A bias must be recognized that some respondents completed the survey at the request of Forum members, so the results may be significantly different if this was not the case.

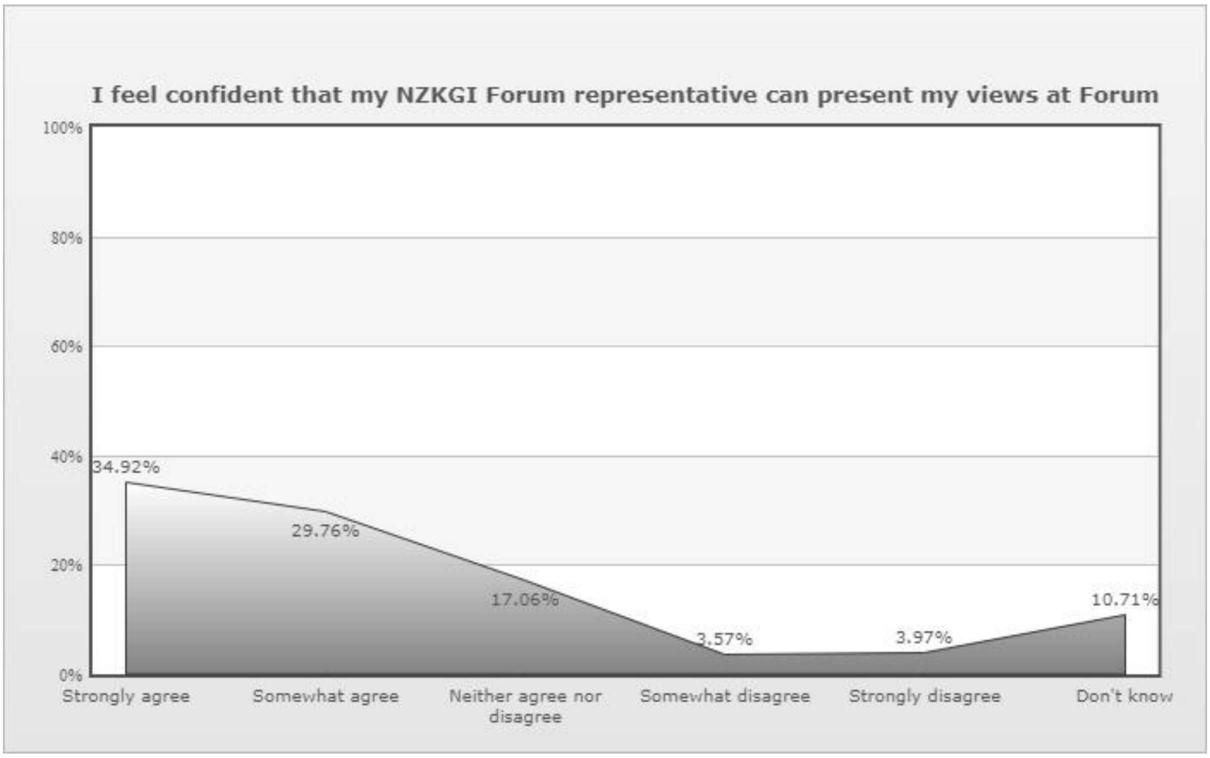
Commentary (15 comments): Some respondents stated they knew who their representative/s are, while others did not.

Recommendations: Discussion should be held as to if the results above are satisfactory (also taking the aforementioned bias into account).

Question Eight: Representative presentation of grower views

Answered: 252, Skipped: 21

Previously in Forum meetings there has been discussion of if representative views presented are the views of their constituency or the personal view of the representative. The aim of question eight is to ascertain from the grower if they think their view is presented in forum meetings.



Results show a tendency for respondents to state that their views are presented at Forum. Again, bias must be examined as some respondents completed the survey at the request of forum members, so the results may be significantly different if this was not the case.

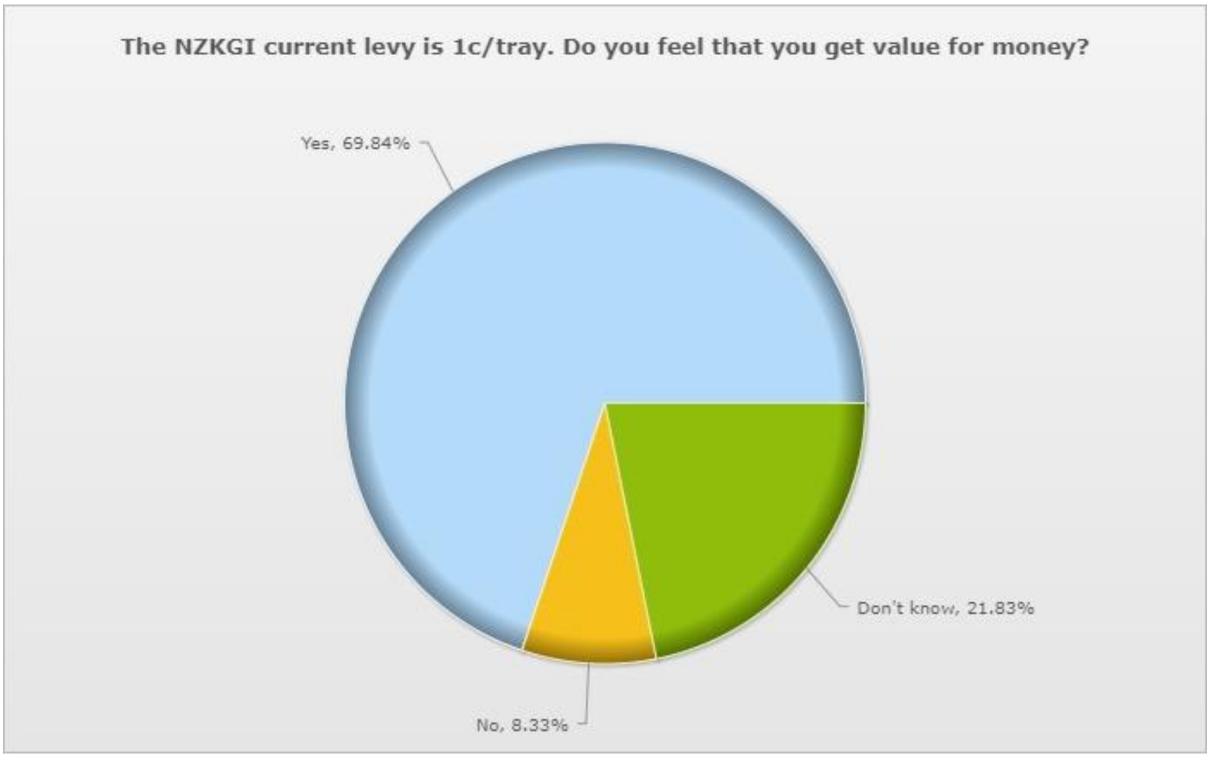
Commentary (13 comments): Commentary was diverse and no common narrative could be found.

Recommendations: Further analysis to remove the bias and create a statistically significant result would provide further clarity as to how representative this result is.

Question Nine: Does the current levy provide value?

Answered: 252, Skipped: 21

This question was designed to investigate if there is appetite to change the current levy.



The results show that the majority of respondents think that the current levy gives value for money.

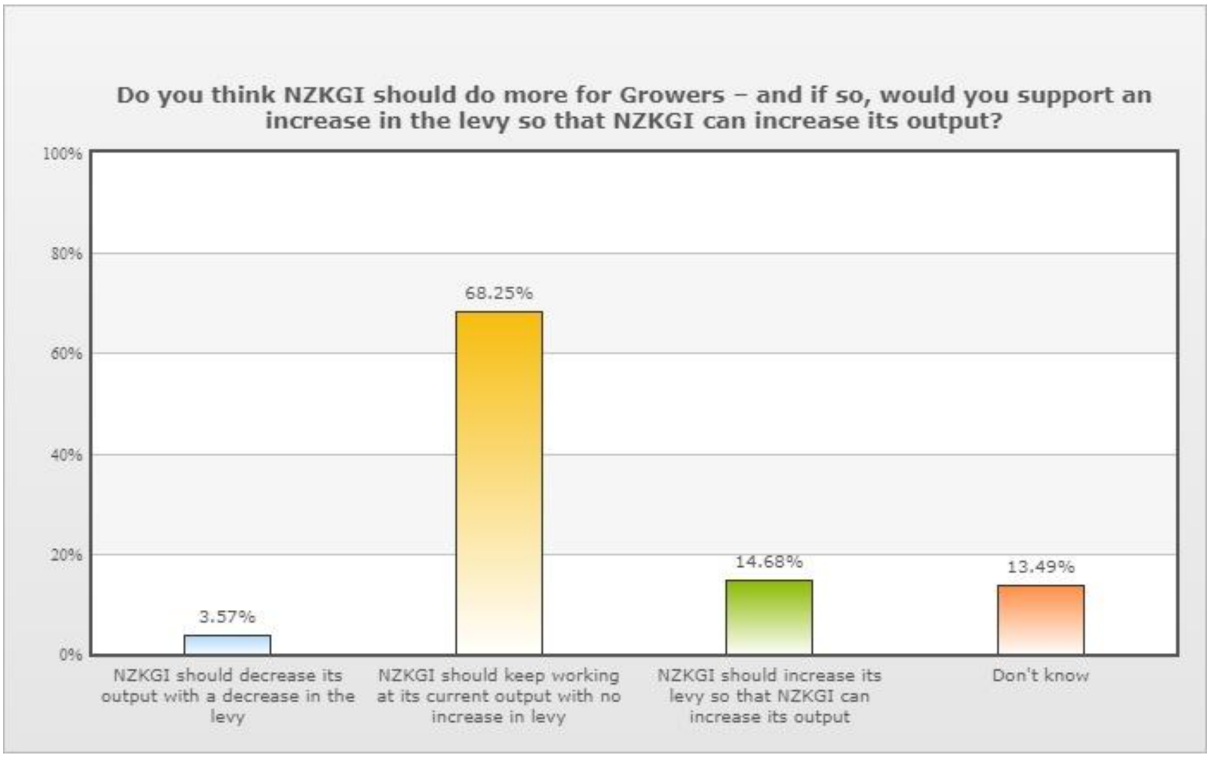
Commentary (13 comments): Commentary was diverse and no common narrative could be found.

Recommendations: Further investigation could be conducted to understand the drivers behind why respondents answered with the above. This insight could lead to discussion of if and how NZKGI can get more value from the levy.

Question 10: Support for an increase in the levy

Answered: 252, Skipped: 21

Continuing from question nine, this question was designed to investigate if there is appetite to change the current levy.



A clear majority of respondents have answered that the levy should stay at its current rate.

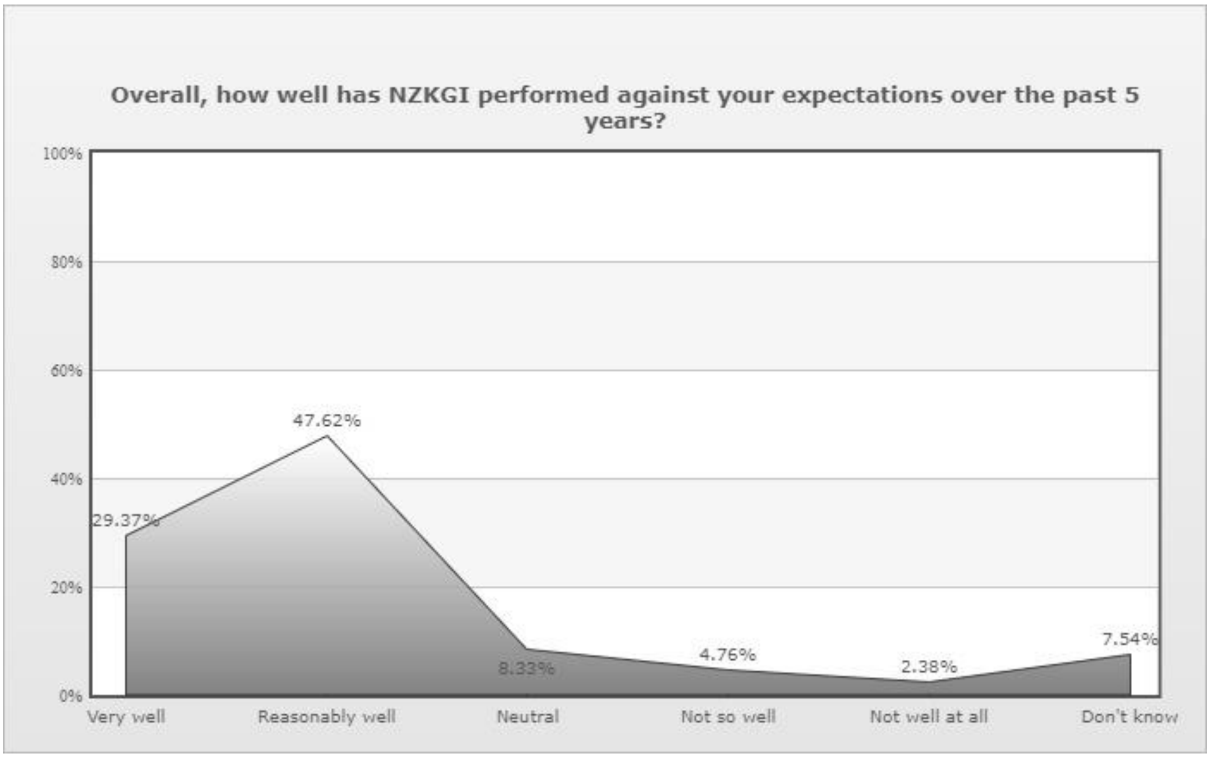
Commentary (35 comments): There was a common misunderstanding that an increase in NZKGI's activities would be covered by an increase in the volume of trays. There was also a request for information on what areas NZKGI would increase its output in order to require an increase in the levy.

Recommendations: It could be communicated to growers that that the increase in levy income from increased trays sold is minor and insufficient to cover increasing or even maintaining NZKGI's activities. A proposal describing the areas in which NZKGI would increase its output to justify a levy increase could also result in clearer feedback from respondents.

Question 11: NZKGI performance overall

Answered: 252, Skipped: 21

The aim of this question was to ascertain respondents overall perception about NZKGI's performance.



77% of respondents stated that NZKGI has performed very well or reasonably well against their expectations over the past 5 years.

Commentary (18 comments): Commentary was diverse and no common narrative could be found.

Recommendations: This is a key question to ask over coming years to ascertain if there is a shift in perspective, and if so, why.

Questions 12 - 15

The results to these questions have been stated in the chapter *Survey Collection*.

Question 16: Changes from the performance review

Answered: 116, Skipped: 157

This question asks growers is the most important change they would like to see as a result of this performance review.

Commentary (116 comments): Commentary was very diverse with the only common narrative from 17% of respondents that no changes are necessary for NZKGI from its current work.

Question 17: Further comments

Answered: 60, Skipped: 213

This question was designed to get general feedback from respondents about NZKGI's performance that may have otherwise been missed in the set survey responses available.

Commentary (60 comments): Commentary touched on NZKGI remaining independent from Zespri and that NZKGI is doing a good job.