

Australian Persimmon Industry

2009/10 Marketing Program

Final Report



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Introduction

The purpose of this report is to provide the Australian Persimmon Industry with an overview and evaluation of the HAL managed promotions campaign in 2009/10 funded from industry marketing levies.

Objectives:

The objective of the Australian Persimmon industry, as outlined in its five-year strategic plan is:

‘To profitably and sustainably produce a quality product, to grow the demand for sweet persimmon for a range of domestic and export markets, and to ensure the product is marketed and promoted to the best advantage for growers’

Objectives from Strategic Plan

Objective 3: Increase demand for product

- Increase domestic consumer awareness / consumption
- Improve value chain relationships
- Export market development

Marketing Objectives

Persimmons Australia recently finalised a new strategic industry plan (2008 – 13)

Mission Statement

‘To profitably and sustainably produce a quality product to meet the demand for sweet persimmons from a range of domestic and export markets, and ensure the product is marketed and promoted to the best advantage of growers.’

Objective 3

- Increase domestic awareness / consumption
- Improve value chain relationships
- Develop export markets

The aim of the 2009 – 2010 Marketing Plan is to:

- Build on previous campaigns
- Leverage NZ co-operative funding if possible
- Seek 20% improvement on results/outcomes in line with budget increase
- Align campaign with strategic plan objectives
- Marketing strategies:
 - Raise consumer awareness
 - Encourage consumer trial
 - Build in-store visibility
 - Demonstrate support to retailers

Target Markets and Tactical Approaches:

The key target markets for the Australian Persimmons promotions campaign in 2009/10 were identified as:

1. Non users, lapsed and occasional users;
 - Younger consumers 20-35 years.
 - Adult, male/female primary grocery buyers 35+ years.
2. Frequent users;
 - Primary grocery buyers predominantly females aged 35+
3. Stakeholders;
 - Retailers such as independents, Woolworths, Coles buyers and Persimmon growers.

To reach these groups and achieve the above campaign objectives the following components were chosen:

1. Public Relations
 - a. Orchard Tour and Lunch
 - b. Season Announcement HTML
 - c. Media Coverage
2. Point of Sale – development and distribution
3. In-store demonstrations
4. Merchandising
5. Retail education
 - a. Back room poster
6. Consumer website
7. Research

1. Public Relations

The seven month PR campaign commenced in December 2009, with the objectives being to educate consumers on:

- The difference between non-astringent/sweet and astringent/original varieties;
- Uses, selection, seasonality and storage, and
- Encourage trial
- *Bring the Pure Pleasure to Your Life with Australian Persimmons.*

In order to address these objectives, the PR agency needed to educate journalists (and therefore their readers) about persimmons and their unique taste. This was done via:

- Explaining the difference between non-astringent/sweet and astringent/original (including marrying flavour information with persimmon basics to overcome media confusion)
- Engaging ambassador Warren Turnbull and leveraging his cachet
- Communicating seasonal information early to bring forward media coverage
- Providing inspirational usage and recipe ideas

Following is an overview of the activities conducted during the PR campaign.

a) Orchard Tour and Lunch

To celebrate the start of the season, key food media were invited to a Persimmon Orchard Tour. Hosted by Assiette head chef/owner and persimmon Ambassador Warren Turbull, guests toured Sydney orchard Kathleen Haven to see how persimmons are grown.

On arrival, guests enjoyed a persimmon inspired morning tea of persimmon muffins and pikelets with persimmon jam and crème fraiche.

Following morning tea, guests travelled by bus into the orchard where Kathleen Haven owner Brett Guthrie explained how persimmons were grown, the differences between non astringent / sweet and astringent / original persimmons and the challenges faced by farmers.

Guests then enjoyed a specially created persimmon gourmet lunch on the lawn of the orchard, prepared by Warren Turbull.

The menu included:

- Shashimi of kingfish with Sweet Persimmon granite and jalapeño pepper
- Entrée - Sweet Persimmon and foie gras ravioli with cured duck breast and Sweet Persimmon salsa
- Main - Braised pork cheek with roasted pork fillet, Original Persimmon chutney and a Sweet Persimmon salad
- Dessert - Original Persimmon bavarois with Original Persimmon and mint soup & crème fraiche sorbet

Each dish was served with matched wines.

Orchard Tour invitation:



...to our table.


You are invited to join us for an exclusive afternoon of celebration to welcome in the persimmon season. Be prepared to be romanced by this tropical delight as your host and grower Brett Guthrie unravels the secrets of the persimmon.

When you arrive at Kathleen Haven, you'll take a walk through the orchard, champagne in hand, and then retire to the manicured lawns for a persimmon-rich luncheon prepared by leading Sydney head chef Warren Turnbull of two hatted Assiette in Surry Hills. Following the event, you'll be driven back to Sydney, content and relaxed, heady with renewed passion for the Australian persimmon.

WHEN: TUESDAY, 16TH MARCH 2010 – 12 NOON
ONWARDS (GET DRINKS TO THE CITY AT APPROXIMATELY 6PM,
WHERE: KATHLEEN HAVEN ORCHARD, COBITY.

11.45 COLLECTED FROM IMPACT COMMUNICATIONS
67-80 MURRAY STREET PERSIMMON
1.00 ARRIVE AT KATHLEEN HAVEN
1.10 WELCOME DRINKS/SNACK & WELCOME BY
BRETT GUTHRIE, GROWER & OWNER OF
PERSIMMON ORCHARD KATHLEEN HAVEN
1.20 TOUR OF KATHLEEN HAVEN
2.00 LUNCH IN THE GARDEN OF KATHLEEN HAVEN
3.45 DEPART KATHLEEN HAVEN
5.00ISH ARRIVE IN THE CITY

RSVP: MONDAY, 1ST MARCH 2010 TO
LAURA CARO AT IMPACT COMMUNICATIONS
ON 9519 5411 / 0114 706 852 OR EMAIL
LAURA@IMPACTCOMMUNICATIONS.COM.AU



Following are the list of key food media who attended the orchard tour:

- Robin Powell - *SMH - Good Living*
- Jennene Plummer - *Woman.s Day*
- Sarah Hobbs - *Notebook*
- Tessa Immens - *Woman.s Day*
- Julie Lee - *Australian Good Taste*
- Yasmin Sabir - *Super Food Ideas*
- Paul Urqhart - *Your Garden*
- Laura Jilwan - *Practical Parenting*
- Rachel Hobson - *Healthy Food*
- Kini Hickson - *Better Homes & Gardens*

All media who attended the event, left with a persimmon goody bag including non astringent / sweet and astringent / original persimmons, persimmon jam, dried persimmons and a press kit containing a media release and recipes from the lunch.

The event was well received by media who commented about how enjoyable the day was. There was an overwhelming number of thank you notes including:

Thank you so much for yesterday! It was such a lovely afternoon. Please thank the Guthrie.s, for hosting, and Warren, for creating the amazing lunch. By the way, the persimmons have been a big hit in the office this morning..

Rachel Hanson, Healthy Food magazine

This activity was supported by long lead (magazine) and short lead (newspaper and broadcast media) media outreach to secure editorial coverage of persimmons during the season.

b) Season Announcement HTML

The campaign commenced with a season announcement in January to long lead media, key trade partners and industry. The HTML (email) announcement reported on the persimmon season, varietal differences (sweet versus original), usage suggestions and selection, storage and handling tips.

The HTML was distributed to food media nationally. Long lead media were targeted in January while short and mid lead media were targeted in March.



Cradling a ripe persimmon is like holding a fine purse that feels heavy and liquid in the hand. The fruit is a translucent, glowing red-gold and has a delicate but haunting flavour.

—STEPHANIE ALEXANDER, THE COOK'S COMPANION.

Australian Persimmons

14th century explorer Marco Polo first recorded trade in persimmons and for over 150 years they have been grown in Australia. Australian Persimmons are in season from late February to mid-June.

2010 Crop

Hot and dry weather conditions have been beneficial to this year's crop with growers predicting a strong season. Consumers can expect to enjoy good quality fruit with great brilliant orange colour and a beautiful sweet taste.

Harvesting

Approximately Australian persimmon growers produce 2,100 tonnes, or around 10.5 million persimmons. The persimmon grows on a small to medium size deciduous tree. Fruit grows to about the size of an apple, starting out yellow, then turning a wonderful orange, even turning red, as it starts to ripen.

Persimmons are grown in most states of Australia, with major growing regions in south east and sub-tropical QLD, NSW, Shepparton, Mildura, the SA Riverlands, the Murray Valley and in South West WA. Queensland is the biggest producer of persimmons in Australia. Earlier season fruit (mid February until April) comes from the north while later season fruit (April to the end of June) comes from NSW, SA and WA.

Non-astringent and Astringent Persimmons



Non-astringent Persimmon, also known as the sweet persimmon, is a larger round fruit with a diameter of around 10cm and forms the majority of the Australian crop. It has a slightly flattened top that holds its green stem (calyx) and ranges in colour from pale orange to a deep red-orange. The fruit, including the skin, can be eaten when crisp and crunchy or when soft depending on consumer preference. The main non-astringent persimmon variety is the Fuyu.



Astringent Persimmons are large, heart-shaped fruits, ranging in colour from pale orange to deep red-orange. They need to be harvested once fully mature and are ready for eating when the flesh is soft, jelly-like and very sweet. If the variety is eaten too early, the astringency will make the fruit taste bitter.

Selection

Choose persimmons that are smooth, plump, glossy and well-rounded, and with their leaf still attached. The fruit can range in colour from a pale orange to a deep red-orange, depending upon variety and stage of the season. Fruit with surface blemishes are the to eat as fewer and eating quality is unaffected.

Handling and Storage

After removing the leaves, prepare the persimmon by slicing the fruit or cutting it into quarters.

Persimmon in quarters



Persimmon sliced



Despite being firm to the touch, handle persimmons with care as the thin skin is delicate and bruises easily. Sweet persimmons that have gone soft are perfect for use in cooking – but they must be handled gently.

When ripe, persimmons should be stored in the fridge.

Healthy treat

A persimmon contains a very high level of antioxidants, comparable with strawberries and blueberries[1]. A great snack at your desk or in the office, persimmons are also a good source of vitamin A and C, and high in fibre and flavones[2].

Usage Suggestions

Persimmons are a versatile fruit that can be eaten fresh on their own or with yogurt and ice cream. They can also be used in jams and jellies as well as cookies, breads and cakes. For a great snack try making persimmon pies and muffins. For dessert try a luscious persimmon pudding. Persimmon puree can be added to baked goods or served like apple sauce.

For recipes including an Italian persimmon salad, log onto www.persimmonsaustralia.com.au

Savour the pure pleasures of Australian Persimmons and support Australian Persimmon growers this season.

With thanks,
Gert Andree,
President, Persimmons Australia Inc.

[1] K.T. George, S. Kishore, R. Ashraf and M. Saeed. Genetic diversity of Persimmon fruit (Kakigwa). Department of Forestry, Fisheries and Fisheries
[2] <http://www.whfoods.com/geninfo/geninfo.asp?一品=100&fruit=100014>



c) Media Coverage

A media release was developed to give media an understanding of Australian persimmons. The media release focused on differentiating non astringent / sweet and astringent / original persimmons, discussed how to use complimentary ingredients and flavours and suggested usages.

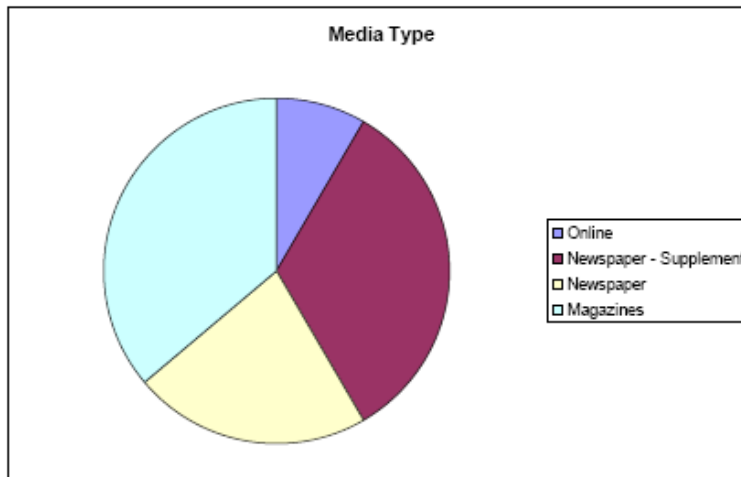
The media release was distributed to long lead media in March 2010 and short lead media in April 2010. Long lead targets included *Donna Hay, Australian Good Taste, Gourmet Traveller, Delicious, BBC Good Food, Woman's Day* and *New Idea*.

Short lead targets included food liftouts *The Daily Telegraph - Taste.com.au, Sydney Morning Herald, Good Living, The Age, Epicure* etc, food columns and online.

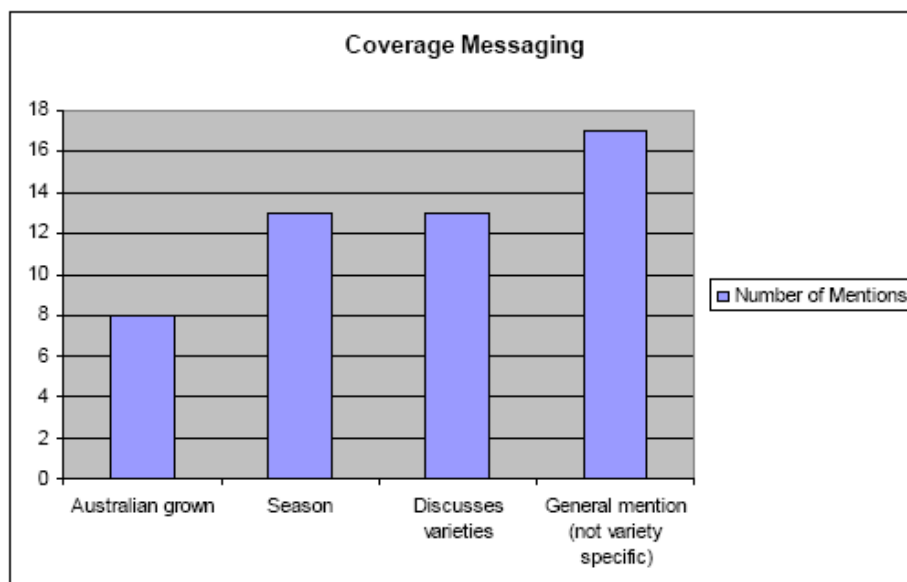
Ongoing liaison with media was conducted to drive coverage and generate interviews with growers and the ambassador, Warren Turnbull. In order to be able to track the coverage during the campaign, media monitoring was used.

(See Attachment A for a copy of the media materials.)

2010 Persimmon Coverage																											
Date	Publication	Circulation	Title	Medium	Plo	Recip e	Star Rating	Key Messages (TBC)										State or National	Variety	Article Type	Source of Voice	Length	AVE				
								Australian Grown	Season	Uses terms 'sweet' and 'original'	Discuss varieties	Mentions in general	Sweet	Original	Both												
27/02/2010	The Age - Epicure	200800	Top 5 ancient fruits	Newspaper - Supplement	no	no	1														State	both	Editorial	none	7 cm / 1 column	\$3,465.00	
16/03/2010	Sydney Morning Herald - Good Living	208210	In Season	Newspaper - Supplement	yes	no	3														State	sweet	Editorial	Robin Powell	7 cm / 1 column	\$593.53	
30/03/2010	The Age - Epicure	202100	Market Watch	Newspaper	no	no	1														State	general	Editorial	none	7cm / 2 column	\$3,465.00	
Apr-10	Attitude magazine	30000	Two fruits worth sucking on	Magazine	yes	yes	4	x	x												State	general	Editorial	none	1 page	\$1,650.00	
Apr-10	Burke's Backyard	55230	Heavenly Persimmons	Magazine	yes	no	5	x	x	sweet	x										National	general	Feature	Don Burke	3 pages	\$28,710.00	
Apr-10	Open House Food Service	20304	Fresh from the orchard	Magazine	yes	yes	2														National	general	Editorial	Warren Turnbull	1/2 page	\$4,651.00	
Apr-10	Attitude magazine	35000	Two fruits worth sucking on	Magazine	yes	yes	5														national	general	Editorial	none	full page	\$1,500.00	
13/04/2010	Daily Telegraph - Taste.com.au	359171	Market Watch	Newspaper	no	no	1														State	general	Editorial	none	5cm / 3 column	\$1,884.50	
16/04/2010	taste.com.au	1913386	Foodie things I've learnt	Online	yes	yes	5	x	x	x	x										National	both	Editorial	none	1 page		
27/04/2010	The Age - Epicure	202100	Market Watch	Newspaper	no	no	1														State	general	Editorial	none	7cm / 2 column	\$3,465.00	
29/04/2010	Adelaide Advertiser	180853	In Season	Magazine	yes	yes	4	x	x												State	general	Editorial	Daniel	20cm / 2cm	\$1,814.50	
May-10	Australian Good Food	80838	Eat it now	Magazine	yes	no	1														National	general	Editorial	none	1/4 page	\$3,132.50	
May-10	Courier Mail	211230	Market Watch	Newspaper	no	no	1				sweet										State	sweet	Editorial	none	5cm / 2 column	\$565.30	
May-10	Notebook	68573	In season	Magazine	no	no	1														National	general	Editorial	none	1/3 page	\$3,940.00	
May-10	Good Health	64216	Best juicy fruit right now	Magazine	yes	no	3														x	National	both	Editorial	none	1/4 Page	\$3,370.00
4/05/2010	Sydney Morning Herald - Good Living	208210	In Season	Newspaper - Supplement	yes	no	3														State	both	Editorial	Robin Powell	7 cm / 1 column	\$593.53	
8/05/2010	Sunday Mail Brisbane	525477	Heaven in each slice	Newspaper	yes	yes	5														x	State	both	Editorial	Matt Moran	15cm / 5 column	\$8,001.75
9/05/2010	Sunday Telegraph	632009	Go soft on this flighty fruit	Newspaper	yes	yes	5														x	State	both	Editorial	Matt Moran	15cm / 5 column	\$9,245.75
10/05/2010	Newcastle Herald	48500	Home Grown	Newspaper - Supplement	no	no	1														x	State	both	Editorial	none	15cm / 1 column	\$1,425.00
12/05/2010	Melbourne Weekly	110027	Persimmon Power	Newspaper - Supplement	yes	yes	4	x	x												State	general	Editorial	none	1/4 page	\$1,626.90	
12/05/2010	Adelaide Advertiser - Taste.com.au	180853	Persimmons	Newspaper - Supplement	Yes	no	3														State	general	Editorial	none	12cm / 1 column	\$484.44	
12/05/2010	Northern Territory News - Taste.com.au	20563	In season - Persimmons	Newspaper - Supplement	yes	no	3														State	general	Editorial	none	12cm / 1 column	\$179.52	
12/05/2010	Herald Sun - Taste.com.au	51400	In season - Persimmons	Newspaper - Supplement	yes	no	3														State	general	Editorial	none	12cm / 1 column	\$1,756.50	
12/05/2010	Daily Telegraph - Taste.com.au	359171	In season - Persimmons	Newspaper - Supplement	yes	no	3														State	general	Editorial	none	12cm / 1 column	\$1,479.48	
12/05/2010	Courier Mail	211230	Persimmons	Newspaper - Supplement	yes	no	3														State	general	Editorial	none	12cm / 1 column	\$678.36	
12/05/2010	Hobart Mercury	45210	Persimmons	Newspaper - Supplement	yes	no	3														State	general	Editorial	none	12cm / 1 column	\$76.80	
12/05/2010	Pitara News	6700	Baked persimmon pudding	Newspaper	no	yes	2				sweet										State	sweet	Editorial	none	7cm / 2 column	\$80.86	
12/05/2010	North West Telegraph	5700	Hot ideas for making brilliance	Newspaper	no	yes	2				sweet										State	sweet	Editorial	none	12cm / 5 column	\$401.40	
17/05/2010	Woman's Day	408508	What's good now	Magazine	yes	no	3														x	National	both	Editorial	none	1/4 page	\$10,072.50
18/05/2010	Heidelberg & Diamond Valley Weekly	74524	Persimmon Power	Newspaper - Supplement	yes	yes	4	x	x	sweet											State	sweet	Editorial	none	10cm / 2 column	\$310.50	
26/05/2010	The Age - Epicure	202100	Victorian Produce In season	Newspaper - Supplement	yes	no	3	x	x												National	general	Editorial	none	10cm / 1 column	\$3,465.00	
Jun-10	Curkiz.com.au	32000	The Golden Fruit is Available from March until June	Online	yes	no	3	x	x	both	x										x	National	both	Editorial	Warren Turnbull and Kierri Andrew	1 page	\$329.00
Jun-10	Curkiz.com.au	32000	Persimmon and Snapper Salad With Lemon Lime Dressing	Online	yes	yes	2				sweet										National	sweet	Editorial	none	1 page	\$329.00	
Jun-10	Notebook	68573	Chef's tip: Cooking with persimmon	Magazine	yes	yes	4														x	National	both	Editorial	Warren Turnbull	1/4 Page	\$2,962.50
Jun-10	Australian Women's Weekly	502441	Quick bites	Magazine	yes	no	3				both	x									x	National	both	Editorial	none	1/3 page	\$19,250.00
1/07/2010	Health Smart	80000	In season	Magazine	no	no	1														National	general	Editorial	none	7 cm / 1 column	\$2,585.00	



Approximately one third of media coverage was secured in magazines. Metro newspaper and newspaper supplement coverage made up the majority of the remaining coverage.



This graph illustrates that while varieties are being mentioned, in the main Persimmons are seen as Persimmons. Therefore more education is required to educate the media about varieties.

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Key Media Results:

Below are the results for the PR campaign against the KPIs set at the beginning of the program.

KPI	RESULT
ORCHARD TOUR AND LUNCH <ul style="list-style-type: none"> Secure fifteen media to attend event 	<ul style="list-style-type: none"> 16 guests RSVP'd to attend however on-day cancellations resulted in 10 guests attending
SEASON ANNOUNCEMENT HTML <ul style="list-style-type: none"> Distribute HTML Achieve minimum open rate of 30% 	<ul style="list-style-type: none"> 61%
MEDIA COVERAGE <ul style="list-style-type: none"> Total number of clips (target 32) Circulation Advertising Value Equivalent (AVE) for editorial The quality of media coverage gained was also analysed as per the guide below <ul style="list-style-type: none"> 5 star – Full page article, television or radio clip or article that includes audience interaction or opportunity 4 star – Mention of Persimmons (editorial), images of Persimmons and Persimmons in recipes 3 star – Mention of Persimmons (editorial) and images of Persimmons 2 star – Inclusion of Persimmons in recipes (no editorial) 1 star – Mention Persimmons 	<ul style="list-style-type: none"> 35 clips secured (29 clips secured in 2009) Circulation - 7,641,197 (6,504,267) AVE – \$144,697 (\$247,116.19) Star ratings <ul style="list-style-type: none"> 5 star - 5 clips 4 star – 5 clips 3 star – 13 clips 2 star – 4 clips 1 star – 9 clips

Return on Investment: \$1:\$7.30 (\$1:\$30.32)

Note: Difference in ROI and circulation is due to coverage on the high viewership on Ch 9's Mornings With Kerri-Anne in 2009

2. Point of Sale (POS)

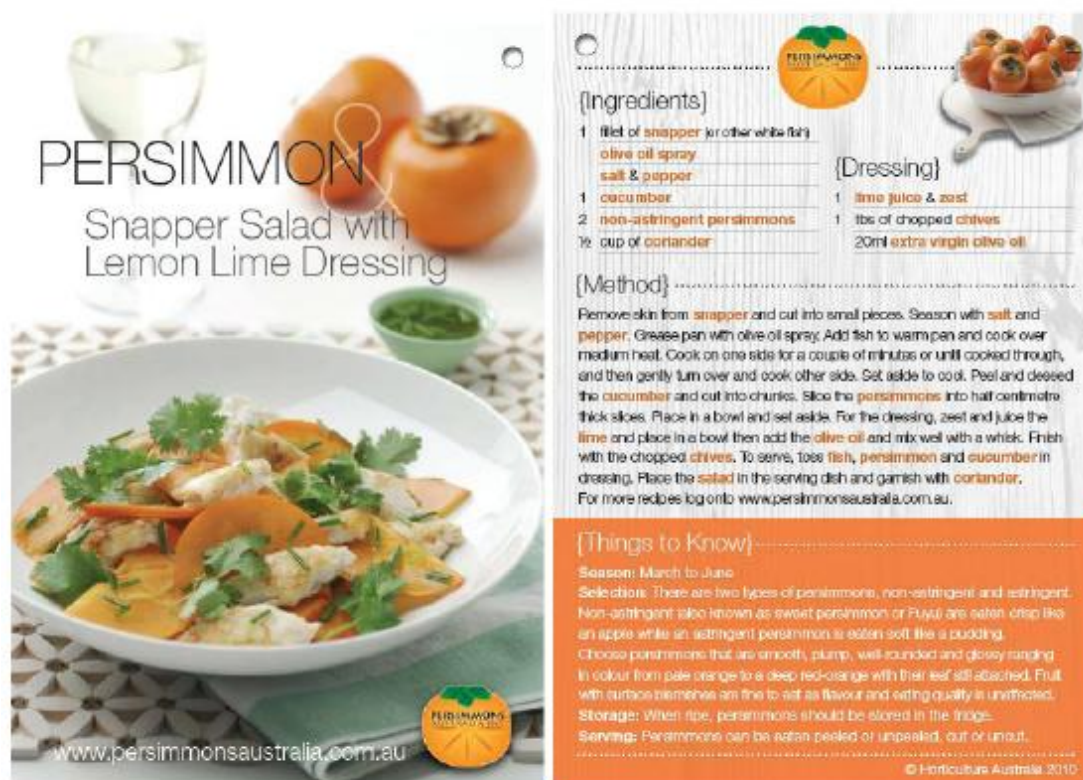
To support trade, a new recipe pad was developed and an existing backroom poster was reprinted

New recipes and photography for the 2010/2011 campaign were created and shot for use in the coming year.

A6 recipe pad

A new A6 recipe pad was developed in 2009/10 using the delicious recipe: *Snapper Salad with Lemon Lime Dressing* developed as part of the 2008/09 program. The recipe pad was double sided featuring the eye-catching recipe image on the front with the method on the back. It also contained information about the seasonality, storage and handling, as well as the Persimmon website in order to increase traffic to the site.

The pad also had a hole drilled in the top left hand corner to make it easier for retailers to display next to the fruit. This format eliminated the need for them to have a specific sized card holder next to the fruit displays.



Distribution

We appointed Australian Produce Group (APG) to distribute the POS material. They have relationships with key independent stores nationally as well as the ability to personally visit the wholesalers at the national markets.

The material was sent to the following 100 key independent stores nationally. Each retailer received the following pack:

- A6 recipe pad – 3 per pack
- Back room poster – 1 per pack

Store	Suburb	State
Simply Fresh Fruit Market	Canberra City	ACT
Simply Fresh Fruit Market	Philip	ACT
Tom's Superfruit	Belconnen	ACT

Wiffens Fruit & Veg	Fyshwick Markets	ACT
Ziggy's Garden Fresh	Belconnen	ACT
Banana Joe's	Marrickville	NSW
Best Fresh Farm MarketsCaringbah	Caringbah	NSW
Campsie Growers Market	Campsie	NSW
Country Garden	Warrawong	NSW
Divine Fruit Centre	Bondi Junction	NSW
Eastgardens Fruit Centre	Eastgardens	NSW
Earlwood Growers Market	Earlwood	NSW
Frenchs Forest Fruitworld	Frenchs Forest	NSW
Filled with fruit	Campbelltown	NSW
Food Lovers Market	Moorebank	NSW
Forestway Fresh	Terrey Hills	NSW
Freshpoint Maroubra	Maroubra	NSW
Freshworld Burwood	Burwood	NSW
Freshworld Castle Hill	Castle Hill	NSW
Freshworld Penrith	Penrith	NSW
Best Fresh Sylvania	Sylvania	NSW
Il Villaggio Fruit	Summer Hill	NSW
Leisure Coast Fruit Markets	Fairy Meadow	NSW
Macarthur Square	Campbelltown	NSW
Maloneys Grocer	Coogee	NSW
Menai Top of the Crop	Menai	NSW
Metro Grocer	Marrickville	NSW
Miles World of Fruit	Bankstown	NSW
Minchinbury Fruit Markets	Minchinbury	NSW
Minto Fruit Orchard	Minto	NSW
Mitchell's Fruit For Less	Warilla	NSW
Mountain Fresh Growers	Winmalee	NSW
Mr Spudley's Vegie Patch	Shellharbour	NSW
Mt Colah Fruitworld	Mt Colah	NSW
New Village Fruit Market	Peakhurst	NSW
North Rocks Fresh	North Rocks	NSW
Northmead Growers Market	Northmead	NSW
Not Just Apples and Oranges	Cessnock	NSW
Ornato's Fruit Market	Bonnyrigg	NSW
Paddock to Pantry	Scone	NSW
Paradise Fruitland	Waitara	NSW
Parisi's of Rose Bay	Rose Bay	NSW
Pymble Garden Fresh	Pymble	NSW
Richmond Fruit Market	Richmond	NSW
So Fresh	Balmain	NSW
St George Fruit Market	Hurstville	NSW
Harbord Growers Market	Harbord	NSW
Dural Fresh	Dural	NSW
The World of Fruit	Campsie	NSW
TJ's Country Fresh	Kincumber	NSW
Town Grocer	Narellan	NSW
Ultra Fresh	Emu Plain	NSW
Waterside Fruit Connection	Pymont	NSW
Wild Oaks Market	Dee Why	NSW
Woonona Fruit Basket	Woonona	NSW
Everton Park Fruit Market	Everton Park	QLD
Fancee Fruit	Carindale	QLD

Feast on Fruit	Morningside	QLD
Frutta Bella	Runaway Bay	QLD
Mango Micks	Capalaba	QLD
Middle Park Fruit Market	Middle Park	QLD
Pacific Fair Fruit Market	Broadbeach	QLD
Rositano's Fresh Fruit and Vegetables	Robina	QLD
Tony's Fruit and Veg	Scarborough	QLD
Wrights Bribie Fruit Market	Bongaree	QLD
Yuen's Fruit	Mermaid Waters	QLD
B-Fresh at Warana Markets	Warana	QLD
Fine Fruit on James	Fortitude Valley	QLD
Milton Fruit Bowl	Milton	QLD
Robina Fruit Market	Caringdale	QLD
Sirianni's Foodstore Ascot	Ascot	QLD
The Greengrocer	Greenacres	SA
Highgate Fruit & Veg shop	Highgate	SA
Main Street Fruit & Veg	Semaphore	SA
Torrensville Plaza Fruit	Mile End	SA
Sunshine Fruit & Veg	Goodwood	SA
Adelaide Fruit & Veg	Kilburn	SA
Adelaide Fresh	Fulham Gardens	SA
Appleana	Kensington Park	SA
Marden Fruit Market	Marden	SA
Banana Palm Fruiterers	Noarlunga Centre	SA
Dublin Fruit & Veg	Dublin	SA
Fruit Corner	Elizabeth	SA
Colonial Fresh Market - Chadstone	Chadstone	VIC
Colonial Fresh Market - Doncaster	Doncaster	VIC
Colonial Fresh Market	Forest Hill	VIC
Handpicked Fruit and Vegetables	Doncaster East	VIC
Manny's Market	Morwell	VIC
Home Growers Fruit & Veg	Westminster	WA
Whatley Fruit & Veg	Bayswater	WA
Combined Gardeners Fruit & Veg	East Victoria Park	WA
Family Fresh Fruit & Veg	Cloverdale	WA
Melville Fruit & Veg	Attadale	WA
Trappers Fruit & Veg	Woodvale	WA
Rockingham Fresh Fruit & Veg	Rockingham	WA
Hub Fruit and Veg	Kwinana	WA
Forest Road Fresh	Armadale	WA
Local Fresh Gourmet Market	Cannington	WA
Lakeside Fresh Harvest	Joondalup	WA
Karinyup Fresh Growers Market and Gourmet Deli	Karinyup	WA

3. In-store Demonstrations

Overview

HAL appointed Let's Launch to conduct the in-store demonstrations for the 2009/10 campaign. The sampling campaign was aimed to drive sales, create awareness and assist sales in independent stores in New South Wales and Victoria.

The activity was executed from week commencing 22nd March 2010 to week commencing 10th of May 2010. The campaign ran for eight (8) consecutive weeks and 22 demonstrations were conducted during that time.

There were branded demonstration tables provided at each demonstration for the Brand Ambassadors to use for cutting the fruit and sampling to consumers. Additionally, a tray was also provided for Brand Ambassadors to roam the store and approach consumers directly.

As an added value, Harris Farm Head office in NSW allowed the Brand Ambassadors to use their cheese stock as a cross promotion in NSW stores only. This allowed Brand Ambassadors to sample the Persimmons with Capel Valley Tasty Cheese and was a great opportunity to showcase a serving suggestion and communicate how versatile Persimmons are.

In addition to the sampling component, each store was merchandised at the end of the assignment to ensure maximum awareness and to assist with sales when Brand Ambassadors left the store.

Objectives

The objectives for this sampling campaign were as follows:

- To engage the target market in this campaign
- Normalising the fruit whilst maintaining its uniqueness
- To educate consumers that Persimmons can be used in various ways

Target Market

The target markets for this campaign were:

- Younger consumers aged 20-35 years
- Adult, male/ female primary grocery buyers for the household aged 35+

Dates / Times

Week 1	w/c 22nd March 2010
Week 2	w/c 29th March 2010
Week 3	w/c 5th April 2010
Week 4	w/c 12th April 2010
Week 5	w/c 19th April 2010
Week 6	w/c 26th April 2010
Week 7	w/c 3rd May 2010
Week 8	w/c 10th May 2010

Assignments were conducted during the above weeks at the following times:
Saturday 10.00am – 1.00pm (3 hours)

Key Performance Indicators (KPI) / Results

	2009 Achieved	2010 Projected	2010 Achieved
Assignments	30 x 3 hours	23 x 3 hours	22 x 3 hours
Samples	2,554	1,971	2,088
Rate of Sampling	1 every 2.1 mins	1 every 2.1 mins	1 every 1.9 mins
Recipe Leaflets Distributed	2,079 (81%)	1,577 (80%)	2,114 (101%)
Incremental Sales (units)	947	789	926
Conversion Rate	37%	41%	44%
Incremental Sales \$'s (based on average sale 1kg @ \$4.99)	\$1,837.00*	\$1,578.00**	\$1,852.00**

* Based on incremental sale being a single unit at an average retail price of \$1.94

** Based on incremental sale being a single unit at an average retail price of \$2.00

Analysis:

The KPIs were set by Let's Launch and Horticulture Australia to increase the previous year's results in a fewer number of assignments.

All campaign targets were exceeded with 2,088 samples distributed, 2,114 recipe leaflets distributed and 926 sales made across NSW and VIC.

Summary

Overall, HAL feels that the in-store activity has been a success in terms of the set objectives and KPIs achieved.

The objectives were met through the following ways.

To engage the target market in this campaign

The target market in this campaign was younger consumers aged 20-35 years and adults male/female primary grocery buyers for the household aged 35+. Of the consumers who were spoken to and sampled to 25% reported to be between the age of 18-34 and 22% reported to be 35-44.

In terms of gender, 61% of consumers were male and 39% were female.

Normalising the fruit whilst maintaining its uniqueness and to educate consumers that Persimmons can be used in various ways.

Through sampling the fruit to consumers Brand Ambassadors broke the barrier of 'fear of the unknown' and unawareness of the fruit. Brand Ambassadors distributed a total of 2,114 recipe cards to consumers, featuring the delicious *Persimmons and Snapper Salad with Lemon Lime Dressing*.

Brand Ambassadors explained the different uses of Persimmons in everyday meal options and the recipe card helped to reinforce that in the minds of the consumers.

Brand Ambassadors educated consumers on uniqueness of the fruit being able to eat it hard or crunchy whilst normalising the fruit through recipe ideas.

(Further analysis of the in-store demonstration campaign can be found in Attachment B.)

4. Merchandising

Overview

An in-store merchandising activity ran alongside the in store demonstrations activity and was also conducted by Let's Launch. The merchandising activity started w/c 22nd March 2010 and ran for three (3) consecutive weeks in independent stores in New South Wales and Victoria.

Objectives

The objectives of the merchandising campaign have been identified as follows:

- Generate excitement
- Increase awareness
- To drive sales
- To complement in-store activity

Dates & Times

Week 1	w/c 22nd March 2010
Week 2	w/c 29th March 2010
Week 3	w/c 5th April 2010

Key Results

Brand Ambassadors recorded what they applied in the stores that they merchandised. The below table indicates the amount of POS applied across the stores in NSW and VIC.

POS Applied In Store			
State	Back of House Poster	Recipe pads	Total POS
NSW	16	68	84
VIC	20	92	112
Total	35	156	196

In the instance that store managers did not allow Brand Ambassadors to apply the POS, the Brand Ambassadors left the POS with the manager and asked them to apply it on the day or within the next couple of days.

POS Left In Store			
State	Back of House Poster	Recipe pads	Total POS
NSW	14	52	66
VIC	6	12	18
Total	20	64	84

(Further analysis from the in-store merchandising campaign can be found in Attachment C.)

5. Retail Education

In order to communicate with the retailers, the back room poster developed in conjunction with Australian Custard Apples was re-printed. The poster was distributed along with the POS material to the 100 national key independent stores and national markets.

australian custard apples the tropical fruit...

...with a soft, sweet difference

<p>Seasonality</p> <ul style="list-style-type: none"> March – October <p>Storage</p> <ul style="list-style-type: none"> Custard Apples ripen at an ideal temperature range of between 18-24 degrees Store at 9-12 degrees for up to 5 days only, longer than this and chill injury occurs Fruit will not ripen below 14 degrees. Fruit stored in temperatures that are too cool can result in blackening of the fruit, which then becomes inedible During winter, store fruits in a warm area Shelf life is quite short <p>Display</p> <ul style="list-style-type: none"> Custard Apples should not be displayed in the cooler display shelves 	<p>Selection</p> <ul style="list-style-type: none"> A Custard Apple is ripe when you gently squeeze it and it gives slightly under your hand, but still green in colour Custard Apples can be bought ready to eat, or still hard to touch, slow to ripen over the next few days after purchase <p>When to eat</p> <ul style="list-style-type: none"> Custard Apples should be eaten soft when the fruit is still green Once ripe, a Custard Apple is at its prime for 2-3 days To eat, simply cut in half and scoop out the white flesh, the Custard Apple should be moist with a pleasant sweet aroma 	<p>African Pride (AP) & Pinks Mammoth (PM)</p> <p>AP - GOOD TO DISPLAY PM - GOOD TO DISPLAY</p> <p>AP - MUST BE SOFT TO EAT OR BECOME BLACK-LIKE THE OTHER</p> <p>PM - MUST BE SOFT TO EAT OR BECOME BLACK-LIKE THE OTHER</p>
<p>Fruit Blackening – Causes of blackening:</p> <ul style="list-style-type: none"> The fruit being picked too early – immature fruit Fruit being cool stored for too long and at too cool a temperature The natural progression of the fruit – once it has ripened it starts to change colour from dull green to black within 3 to 4 days This blackening process will be faster if the fruit is stored in cool conditions for too long 		

australian sweet persimmons

<p>The delicious crunchy tropical fruit</p>		
<p>Seasonality</p> <ul style="list-style-type: none"> Late February – mid June <p>Storage</p> <ul style="list-style-type: none"> Australian Sweet Persimmons are best kept at room temperature. DO NOT REFRIGERATE as this can reduce shelf life Avoid storing next to ethylene producing fruit such as bananas and tomatoes as fruit softens too fast 	<p>Selection</p> <ul style="list-style-type: none"> Sweet Persimmons can be eaten when crisp and crunchy or when soft depending on consumer preference Sweet Persimmon peel is edible The fruit can range in colour from light yellow orange to a deep red-orange, depending upon variety and stage of the season Despite being firm to touch, handle Sweet Persimmons with care as the thin skin is delicate and bruises easily Surface blemishes do not affect the flavour or eating quality For best sales, keep fruit display fresh and well stocked 	<p>WHOLE</p> <p>HALF</p>



For more information on Custard Apples please visit www.custardapple.com.au
© Horticulture Australia 2007



For more information on Australian Sweet Persimmons please visit www.persimmonsaustralia.com.au
© Horticulture Australia 2007

6. Consumer Website

Overview:

Following is a summary of all development completed by Propagate for Persimmons Australia during the 2009/10 program. The main component of this project is the content management system (CMS) which is currently being finalised.

New CMS:

Prior to working with the new CMS, updates to the Persimmons Australia website had been performed by using third party software Adobe Contribute.

Propagate were able to provide a solution for Horticulture Australia whereby they could offer their CMS at a heavily discounted rate provided that the system could be delivered to other websites as well, namely Papaya Australia and the Australian Melon Association. By using the same design templates across the three websites there is now a far superior CMS solution for Persimmons Australia.

The site now has the ability to grow as the industry grows with the ability now to add dynamic pages, create menu systems and image galleries. All aspects of the website, including the homepage feature items, can be easily updated by the administrator, effectively providing a system that can be expanded without the need for a web developer.

The site contains information on storage, selection and handling as well as delicious ways to enjoy Australian Persimmons. There is also a section on the site for media articles and press releases to be stored, this will not only be interesting for consumers but will benefit any media who are keen to learn more about Australian Persimmons.

The current status of the website is at 95% completion, with content being finalised. Once this content has been approved the site will be live.

7. Research

Understanding the perceptions held by consumers, retailers and wholesalers towards persimmons is a vital step in the development of an effective and targeted marketing program for the industry.

During 2009/10, three qualitative research projects were undertaken to uncover these views, their key findings were:

Research Report (Australian Produce Group)

This study of four Melbourne wholesaler agents and five retailers found wholesalers had a strong preference for non-astringent persimmons as they are harder and well coloured, with most referring to the fruit as persimmons.

Among retailers, non-astringent persimmons were the most popular, with both their European and Asian customers preferring softer fruit. Retailers believe sampling is the best way to move the product.

Persimmon Study (Newspoll)

This national study investigated whether Australians are able to correctly identify the different types of persimmons and how often they are consumed.

The results indicate just over one in five Australians eat either non-astringent or astringent persimmons at least once during the local persimmon season. Almost one in ten eat either fruit once a month during the season.

There seems to be confusion between the naming of the two types of persimmons. Respondents are just as likely to use the names sweet persimmon, Fuji fruit and fuyu fruit for both fruits suggesting that there is confusion regarding the names and difference between the two fruits.

Supply Chain Research (HAL)

While it has always been assumed the availability of astringent persimmons was limited and made up less than 10 per cent of the market, however new research has found 12 out of 17 Sydney retailers sell both varieties.

Interviews with the supply chain in Sydney found most retailers agree non-astringent persimmons are more popular with customers of Australian descent but that this group is not the core customer base. It also found that no retailers used the name Sweet Persimmons for the non-astringent variety, they used Fuyu or Fuji fruit.

(Further analysis from the research reports can be found in Attachment D.)

8. Scan Data

Domestic Retail Sales Report Information

Although Persimmons Australia did not contribute to the retail scan data project running through HAL, data was available on Australian Persimmons and has been provided. Following are the scan data slides prepared by Roger Bramble, the previous Industry Analyst at HAL. This report is however a one-off and is not going to be provided in future years unless Persimmons Australia contribute to the multi-industry scan data project.

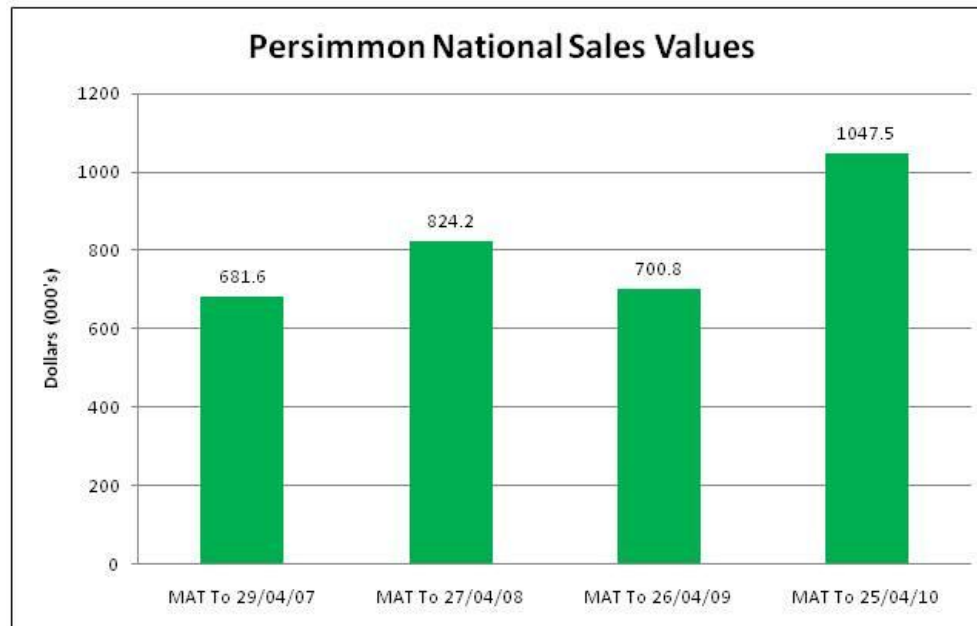
Some key points on retail scan data:

- Scan data was obtained from a major retail grocery chain with outlets in every state/mainland territory.
- Data is from a chain with market share representing approximately 30-35% of retail trade depending on category – not all retail trade.
- Data is collected upon sale only – consumption of products is an assumed outcome of purchase.
- Data is company based and as a result may be manipulated – i.e. no accountability for accuracy.
- Data is subject to standard and systematic sampling and type 1 error.

Persimmon National Sales Values



Know-how for Horticulture™

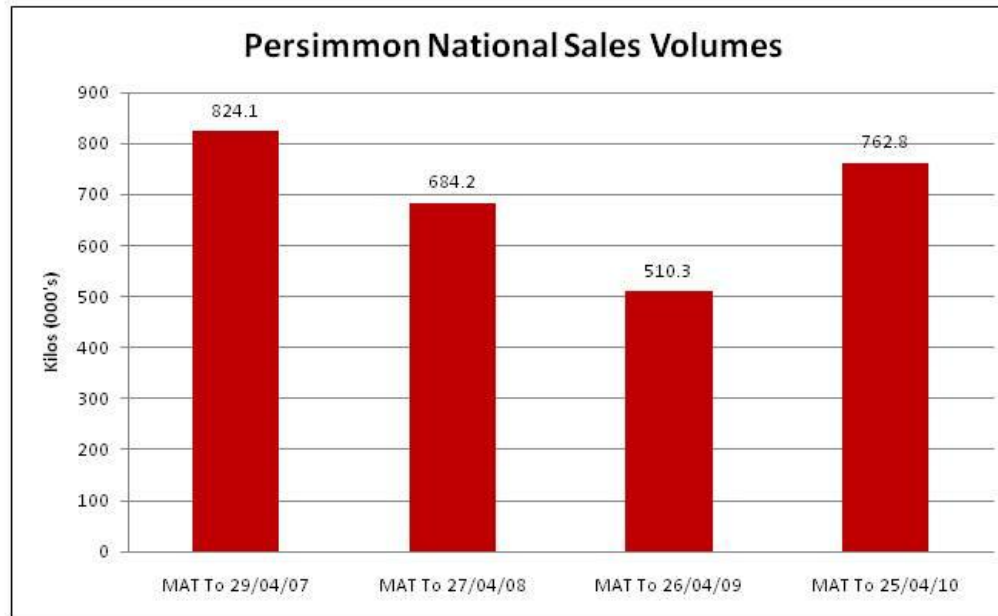


Persimmon National sales values increased by 50% over the prior 12 month period.

Persimmon National Sales Volumes



Know-how for Horticulture™

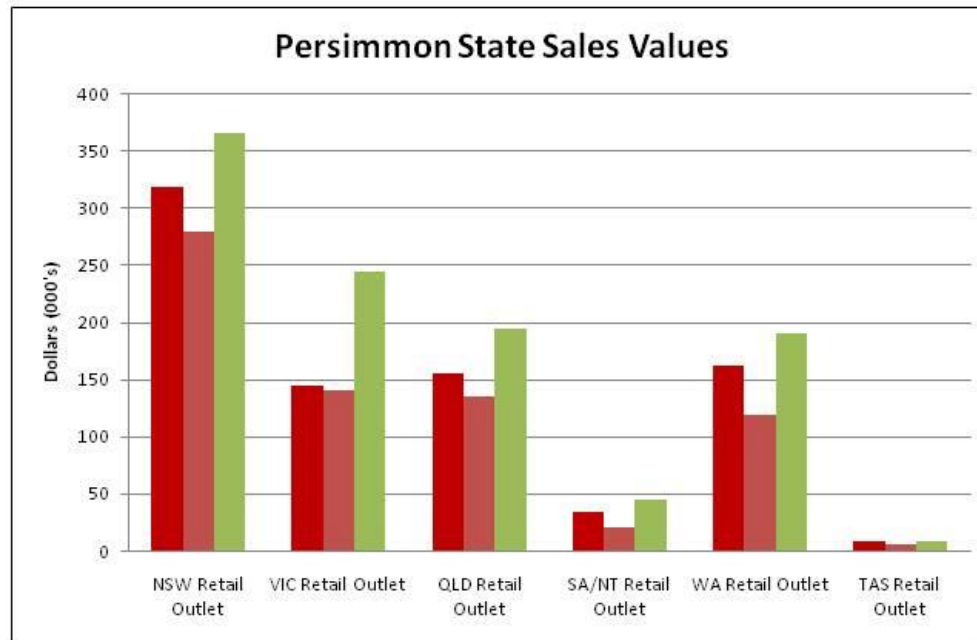


Persimmon National sales volumes increased by 50% over the prior 12 month period which has reversed the recent downward sales volume trend.

Persimmon State Sales Values



Know-how for Horticulture™

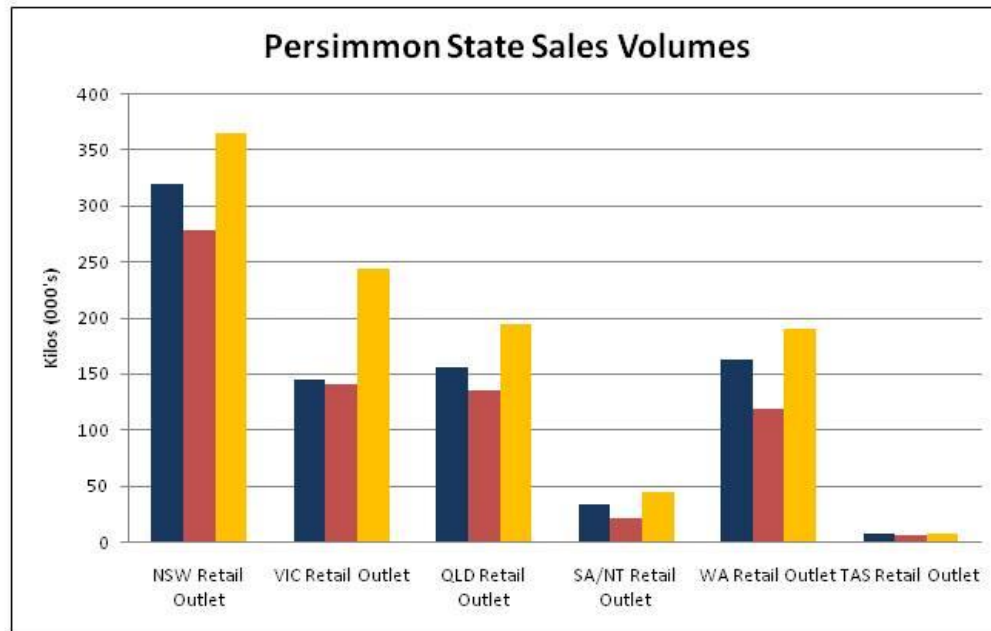


Persimmon state sales values increased across all states in the last 12 months. This indicates a true price and/or volume growth in the national market with all states contributing.

Persimmon State Sales Volumes



Know-how for Horticulture™



Persimmon state sales volumes increase in all states showing a definite market change for persimmons in the last 12 months.

Persimmon Sales Volume & Price Trends



Know-how for Horticulture™



Persimmon sales volume and price trends since 2007 indicate relatively constant patterns in the pricing except for some peak price anomalies. Sales volumes have improved especially during the 2009 season.



7

Key Lessons and Recommendations

Horticulture Australia is really pleased with the outcome of the 2009/10 domestic marketing program.

There were 35 media clips achieved, reaching an audience of over 7.5 million!!

The in-store demonstrations achieved a 44% conversion rate, which meant that 44% of consumers spoken to during the demonstrations actually purchased persimmons as a result.

The research undertaken on the supply chain and consumers (Newspoll) provided interesting results and has helped developed a sound strategy moving forward.

The key learning's and recommendations for each activity are as follows:

Media Relations:

Traditionally, the short season for persimmons has proven problematic for many long lead media; however the distribution of the HTML enabled the PR agency to put persimmons on the media agenda earlier in the year to ensure coverage during the season launch. This activity will be recommended for the 2010/11 program.

Hosting the orchard tour enabled guests to get back-to-basics with persimmons. The exclusive event also reinvigorated the media's romance with the fruit.

Appointing a brand ambassador gave persimmons a clear and consistent voice in the media. Utilising up and coming but highly regarded chef Warren Turnbull as the face of persimmons created additional media engagement.

Retail Education:

The current back-room poster shared with the custard apple industry will be used again in 2010/11. It will be sent out with the in-store POS material to independents nationally and the national wholesalers via the central markets.

Point-of-Sale:

HAL is looking to appoint strategic agency Eleven Communications to develop a new positioning strategy, call to action and the unique selling proposition of persimmons. They will design a new A3 in-store poster which will help to attract consumer's attention when doing their shopping, along with a new A6 recipe pad. More information on this will be provided at the upcoming IAC meeting.

In-store Demonstrations:

Overall, the in-store demonstrations were a success. The recipe leaflets were received well by consumers and served well in presenting the fruit in an everyday way as well as informing consumers on the season, selection, storage and serving.

Targeting stores that were successful in previous demonstrations provided to be successful as the store managers felt on-going support from the industry and were appreciative of this.

The highest selling stores in NSW were Harris Farm stores where the Persimmons were sampled with slices of Capel Valley cheese. This helped to communicate a simple serving suggestion for persimmons and promoted their versatility. It is recommended to use a similar strategy in store during the 2010/11 demonstrations.

Website

Further developing the site to ensure that visitors are receiving new images / information when they re-visit the site. The newly developed media materials, recipes and industry information will also be uploaded onto the site.

HAL is looking forward to implementing a successful marketing program for 2010/11.

Proposed Budget for 2010/11

Project Number	Project Description	Detail	Budget
PR105XX	2010/11 PR	PR campaign to include (not yet developed): Media release Ambassador	\$25,000
PR105XX	In-store Demonstrations	Instore demonstration campaign through Let's Launch again across Eastern Seaboard, in top independent stores.	\$20,000
PR105XX	Creative Strategy	Appoint Eleven Communications to develop a creative strategy for Persimmons Australia. They will look at a new positioning and call to action for the industry as well as the unique selling proposition (USP) for the fruit. New POS material will also be developed.	\$6,000
PR105XX	Website Updates	Allocation to allow for someone in the industry to be trained up on updating the website using the new CMS system.	\$3,000
PR105XX	Contingency		\$1,000
	TOTAL MARKETING		\$55,000



Attachment A – Media Materials

PRESS RELEASE

LET THE PERSIMMON ROMANCE BEGIN THIS AUTUMN

Available now until June

23 February 2010: As the leaves begin to change colour and summer fruits all but disappear, orchards full of Australian persimmons are now ripe and ready for all to savour.

Persimmons, Latin for 'divine food' or fruit of gods, have experienced favourable hot and dry weather conditions over the past year, signaling a strong season. And that's good news for those looking to hold on to the taste of summer!

"With favorable growing conditions producing an abundant crop, consumers can expect to find gorgeous brilliant orange and beautifully sweet tasting fruit in-store from late February," says Kent Andrew, President, Persimmons Australia Inc.

Persimmons can be enjoyed fresh or used in cooking and their sweet, tropical taste compliments either sweet or savory dishes, such as persimmon and custard tarts or crispy duck and persimmon salad.



Persimmon ambassador and two Assiette hatted Head Chef, Warren Turnbull, is passionate about the beauty of the persimmon and believes their natural sweetness of persimmons pairs well with both sweet and savoury dishes.

"Celebrate the persimmon season by savouring their mouth-watering sweetness," says persimmon ambassador Warren Turnbull.

Bite into a sweet persimmons like an apple or add to it to savoury dishes like salsas and salads. Simply combine a sliced persimmon, a handful of spinach and pecans and drizzle with vinegar for a to-die-for salad."

"For desserts, the soft, jam consistency of the astringent persimmon can be devoured with a spoon" Turnbull adds. Avoid confusion and being caught short in the kitchen by knowing how to decipher which persimmon is which."

According to Andrew there are two types of persimmons, sweet and astringent. Sweet persimmons (also known as Fuyu persimmon) are eaten crisp like an apple while an astringent persimmon is eaten soft like a pudding.

"While it's no secret luscious persimmons are a delectable delight, the two varieties, sweet and astringent, are often confused as one but differ in taste, texture and looks," he says.

Most easily distinguished by their shape, the sweet persimmon has a slightly flattened top. The astringent has a pointed top and is heart-shaped.

MORE

Let The Persimmon Romance Begin This Autumn

2

Beyond their visual characteristics, the two persimmon styles differ mostly in their flavour, texture and consistency. The sweet persimmon is a larger, round fruit with a diameter of around 10cm. It ranges in colour from pale orange to a deep red-orange when ripe. The fruit, including the skin, can be eaten when crisp and crunchy.

Astringent persimmons are a smaller, slightly heart-shaped fruit, similar in size to an orange. The pale to burnt-orange coloured fruit is ready for eating and sweetest when the flesh is soft and jelly-like. If this variety is eaten too early, the astringency will make the fruit taste bitter.

“These bountiful beauties contain a very high level of antioxidants, comparable with strawberries and blueberries¹. A great snack at your desk or in the lunchbox, persimmons are also a good source of vitamin A and C, are high in fibre and fat free²,” added Andrew.

Persimmon are grown in most states of Australia, with major growing regions in south east and sub-tropical QLD, NSW, northern Victoria, north west SA and in south west WA. Queensland is the biggest producer of persimmons in Australia. Earlier season fruit (mid February until April) comes from the north while later season fruit (April to the end of June) comes from the southern region.

Annually Australian persimmon growers produce 2,100 tonnes of persimmons or 10.5 million persimmons (approximately).

Selection

Choose persimmons that are smooth, plump, glossy and well-rounded and with their calyx still attached. The fruit can range in colour from a pale orange to a deep red-orange, depending upon variety and stage of the season. Fruit with surface blemishes are fine to eat as flavour and eating quality is unaffected.

Handling and Storage

After removing the leaves, prepare the persimmon by slicing the fruit or cutting it into quarters.

Despite being firm to the touch, handle persimmons with care as the thin skin is delicate and bruises easily. Sweet persimmons that have gone soft are perfect for use in cooking – but they must be handled gently.



When ripe, persimmons should be stored on their own, out of the fridge.

- ENDS -

For further information, images or recipes, contact:

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¹ A.P. George, S.Redpath, *Health and Medicinal Benefits of Persimmon Fruit; A Review*, Department of Primary Industries and Fisheries

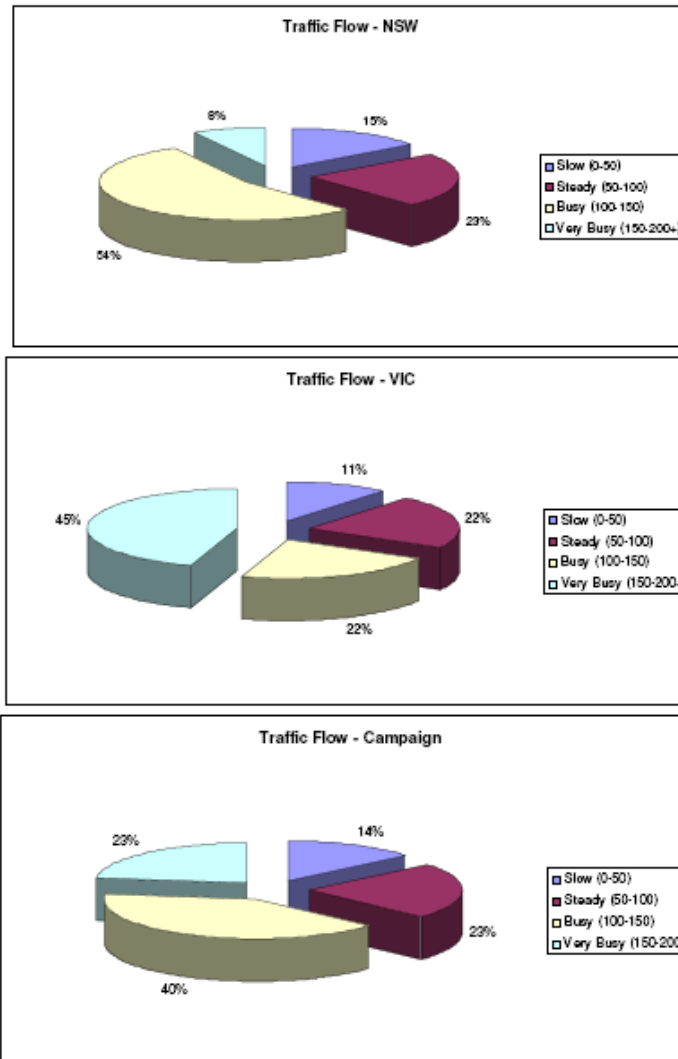
² http://www.webfitnesstools.com/wft/tools?robject=wft_view_food&food_id=2414

Attachment B – In-store Demonstrations – Let’s Launch

Demonstration Results Analysis

Traffic Flow

The following table depicts the Brand Ambassadors description of store traffic flow whilst on assignment:



In New South Wales, 54% of stores recorded a busy traffic flow with between 100-150 consumers passing through the store. Following this, 23% of stores reported a steady traffic flow with 50-100 consumers passing through the store during the time of the promotion.

In Victoria 45% of stores recorded a very busy flow with between 150-200 consumers passing through the store. Following this, 44% of stores reported a traffic flow of 50-150 consumers passing through the store during the time of the promotion.

Nationally 40% of stores recorded a busy traffic flow with between 100-150 consumers passing through the store and 23% of stores reported a very busy traffic flow with 150-200 consumers passing through the store.

Emporio ensured that each assignment was executed at peak store times which was qualified with the store manager.

Consumer Education

The following graph highlights the number of consumers spoken to by Brand Ambassadors while in-store:

Consumer Interaction						
State	0-50 people	51-100 people	101-150 people	151-200 people	200+ people	Total
NSW	4	5	3	1	0	13
VIC	0	4	4	1	0	9
Total	4	9	7	2	0	22
Average	18%	41%	32%	9%	0%	100%

Analysis

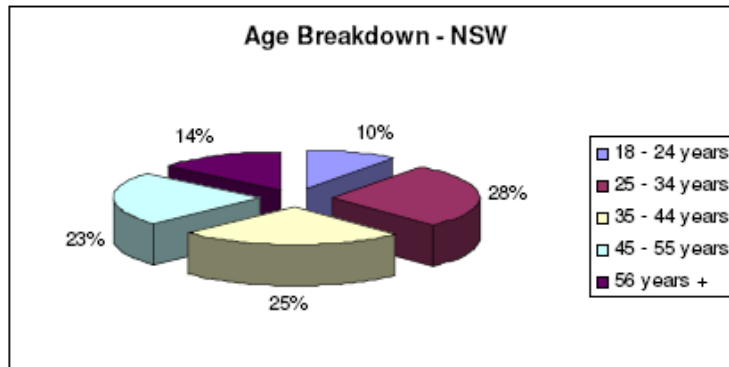
In New South Wales it was reported that in the majority (38%) of assignments, Brand Ambassadors spoke to more 51-100 customers.

In Victoria, Brand Ambassadors also reported that in the majority (45%) of assignments, they spoke to approximately 51-100 customers.

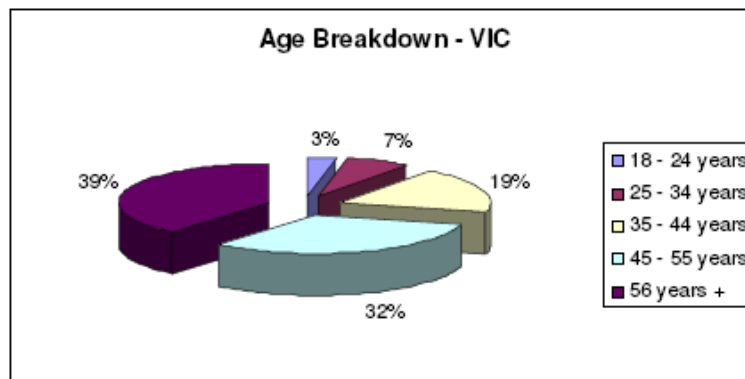
In line with the traffic flow, the above graph shows that Brand Ambassadors were speaking to the majority of people that entered the store during their promotion in both NSW & VIC.

Consumer Demographics - Age

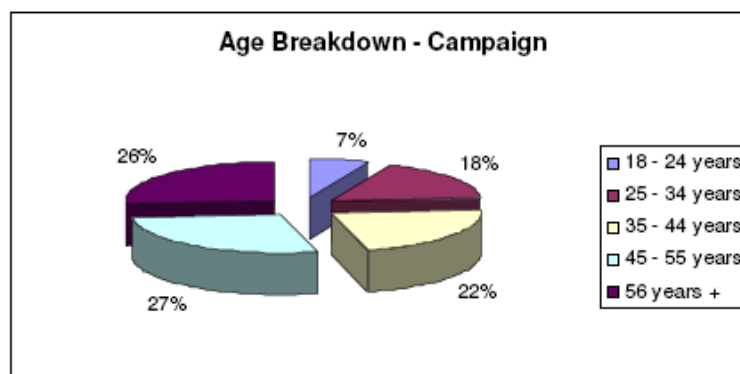
Brand Ambassadors reported on the age categories that consumers fell into whilst in-store during the promotion. These results are presented in the graph below.



In New South Wales, it's reported that 28% of consumers educated fell into the demographic of being 25-34 years old, closely followed by the 35 – 44 year old age bracket with 25%.



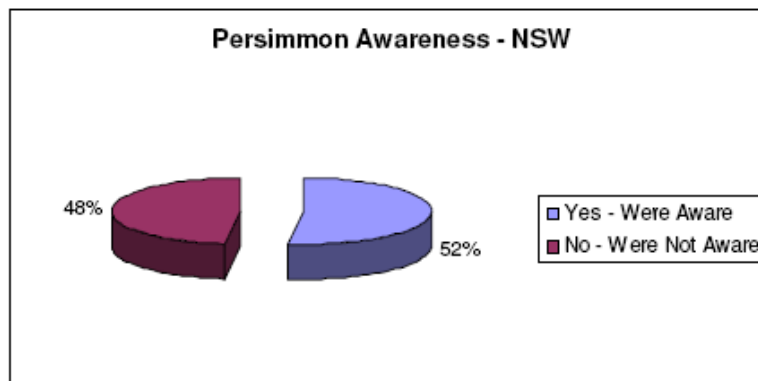
In Victoria, Brand Ambassadors reported that 39% of consumers educated fell into the demographic of being 56 years and older, closely followed by the 45-55 year old age bracket with 32%.



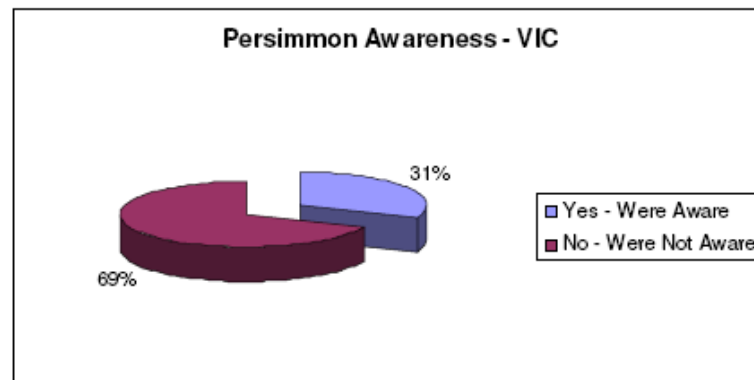
During the campaign, 27% of customers spoken to were aged 45-55 years old, followed by 26% who fell in to the 56 years and above age bracket.

Consumer Awareness

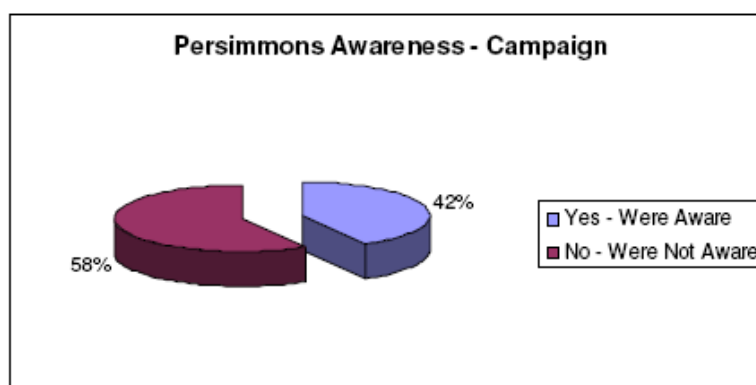
The following table highlights the percentage of consumers in-store who were aware of Persimmons.



In New South Wales it was recorded that only 48% of consumers were aware of Persimmons.



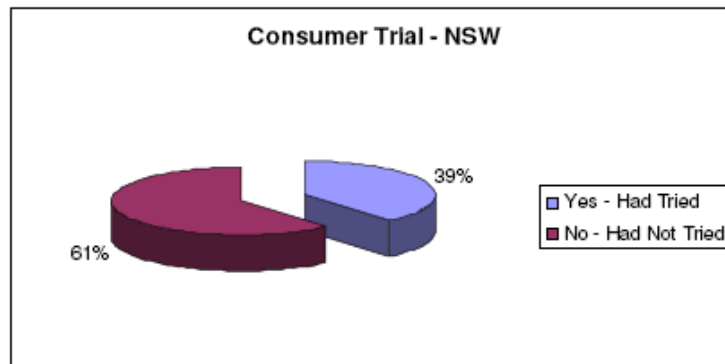
In Victoria it was recorded that 31% of consumers were aware of Sweet Persimmons, which was significantly lower than in NSW.



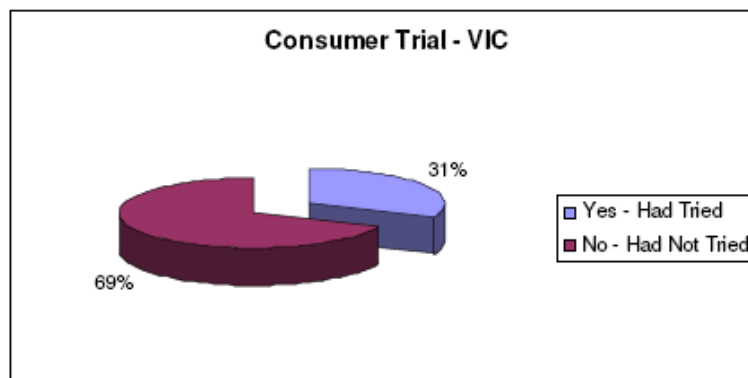
In total 42% of the consumers who were spoken to were aware of Persimmons. Brand Ambassadors were able to introduce 58% of the consumers interacted with to Persimmons and educate them on the key messages.

Consumer Trial

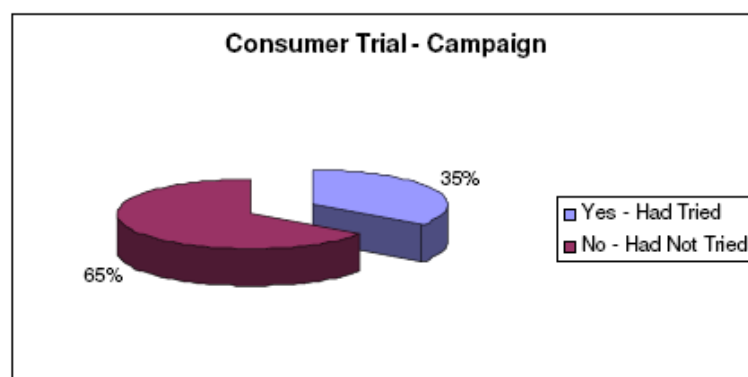
The following table highlights the percentage of consumers in-store who had tasted a Persimmon before:



Of the consumers interacted with in NSW, 39% had tried a Persimmon and 61% said they had not.



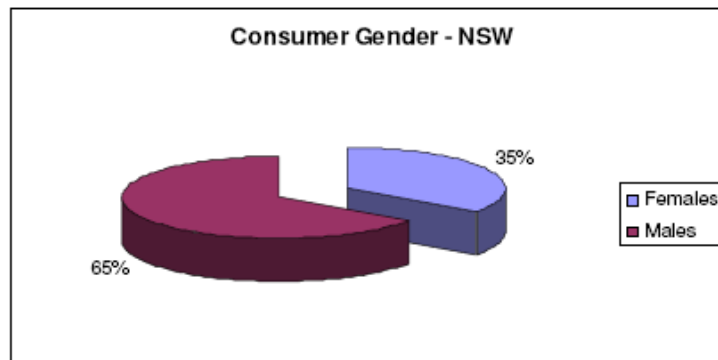
In Victoria of the consumers interacted with 31% had tried a Sweet Persimmon and 69% said they had not.



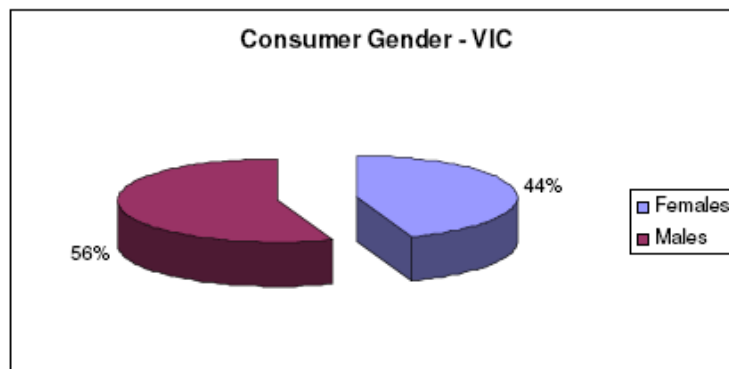
In total, 35% of consumers had tried a Persimmon before, with 65% reporting that they had never tried a Persimmon. In both cases Brand Ambassadors offered a sample to the consumer and educated them on seasonality, storage, selection and when to eat.

Consumer Demographics - Gender

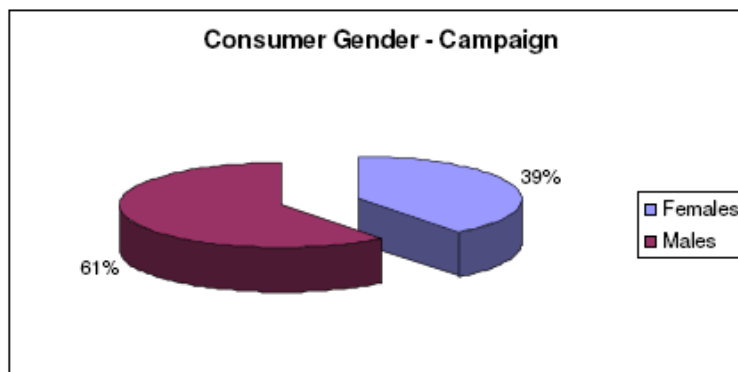
The following graph highlights the percentage of males and females that were in-store at the time of the promotion,



In New South Wales Brand Ambassadors reported that 35% of consumers' in-store was female, in comparison to 65% that were male.



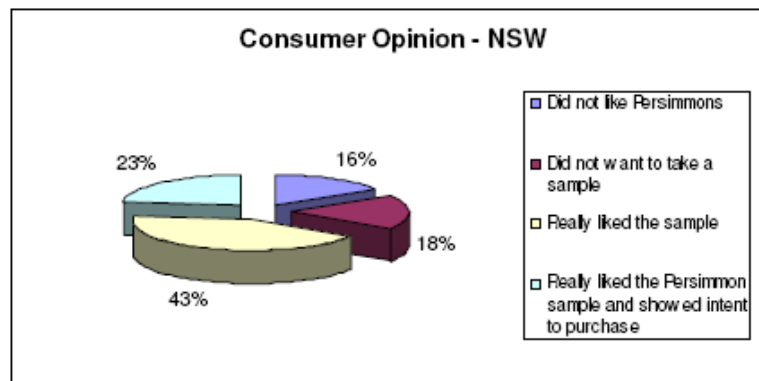
In Victoria, Brand Ambassadors reported that 44% of consumer's in-store was female, in comparison to 56% that were male.



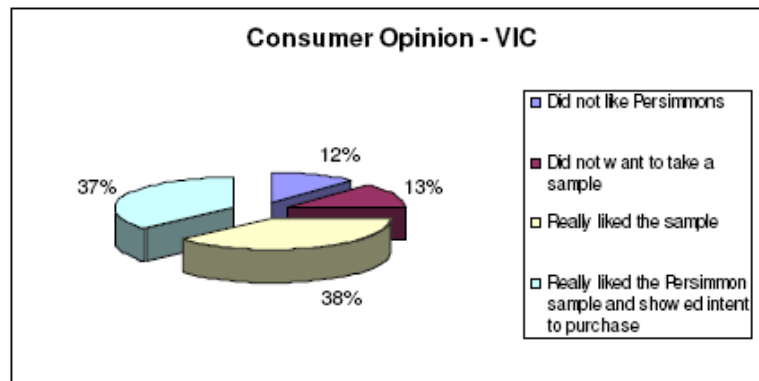
In total, males were recorded as the higher percentage of consumers in-store during the time of the promotion with 61%. Brand Ambassadors were able to speak with both the female and male target markets.

Consumer Opinion

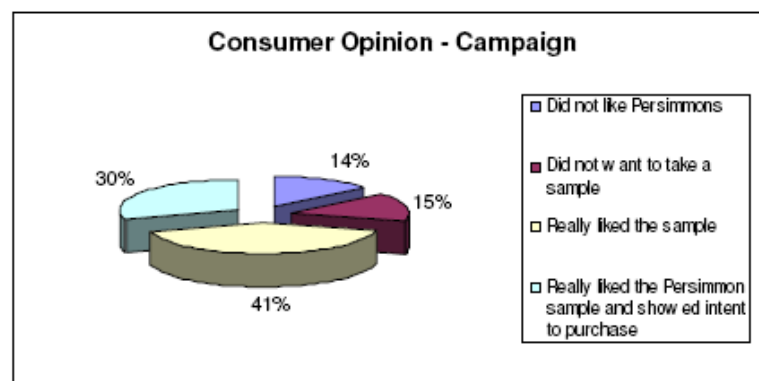
Brand Ambassadors were required to report on the opinion of consumers that tried a Persimmon sample. This is highlighted in the graphs below.



In New South Wales, Brand Ambassador reports indicated that approximately 43% of consumers really liked the Persimmon sample and 23% showed interest in the purchase.



In Victoria, Brand Ambassador reports indicated that approximately 38% of consumers really liked the Sweet Persimmon sample and 37% showed interest in the purchase. This was a great result.



Throughout the whole campaign the graph shows that 41% of consumers really enjoyed the sample and 30% showed interest in purchase due to the sample. This was a great response to the product.

Samples

Brand Ambassadors were required to report on the number of samples that were distributed to consumers. This was recorded in individual portions and the results are illustrated by the following table.

State	Samples Distributed				
	Number of assignments	KPI (Total)	Total samples distributed	KPI (Average)	Average per assignment
NSW	13	1,118	1,323	86	102
VIC	9	774	765	86	85
Total	22	1,892	2,088	86	95

Analysis

As presented in the table above, a total of 2,088 samples were distributed, resulting in an average distribution rate of 95 samples per three hour assignment. The Brand Ambassadors achieved 110% of their target of 86 consumers sampled per assignment.

NSW presented the highest average distribution rate of 102 samples per three hour assignment followed by VIC with 85 samples per assignment. Feedback from stores in Victoria was that Persimmons were not a well known fruit with customers.

Once samples were distributed, Brand Ambassadors took the opportunity to educate consumers on the key messages. Brand Ambassadors also gave out a recipe idea to show consumers that Persimmons can be used in everyday meals, thus normalising the fruit whilst still conveying the uniqueness of the fruit.

Sales

Brand Ambassadors were required to record the number of Persimmons they sold. To gain an accurate reading of sales, Brand Ambassadors took a stock take at the beginning of the assignment and then at the end. The amount was also qualified by the store contact as they signed off on the report form. These results are illustrated by the following table:

State	Sales				
	Number of assignments	KPI (Total)	Total Sales	KPI (Average)	Average sales per assignment
NSW	13	445	532	35	41
VIC	9	315	394	35	44
Total	22	770	926	35	42

Analysis

The table above reports on the total sales achieved by Brand Ambassadors during the campaign period. Throughout the duration of the campaign Brand Ambassadors were advised that sales were a key focus for all activity.

VIC reported the highest sales figure with average sales of 44 Persimmons sold.

The sales target of 35 Persimmons per assignment was exceeded by 120% with the average assignment selling 42 units. The conversion rate was 3% higher than the target of 41%.

The conversion rate is ascertained by dividing sales by samples. We can gain insight into how many consumers purchased the product once receiving a sample. Emporio estimated but did not guarantee a conversion rate of 41% per assignment.

Price Point

Brand Ambassadors were required to report on the price point of Persimmons during their assignment. These results are illustrated by the following table.

Persimmon Price Point			
State	Week	Total Number of assignments	Average price per unit
NSW	1	2	\$1.50
	2	2	\$1.30
	3	2	\$1.66
	4	2	\$2.25
	5	1	\$0.99
	6	1	\$2.99
	7	2	\$1.12
	8	1	\$2.00
VIC	1	1	\$2.00
	2	1	\$2.00
	3	1	\$0.60
	4	2	\$1.49
	5	1	\$1.60
	6	1	\$1.20
	7	1	\$0.40
	8	1	\$0.75

Analysis

As presented in the table above, the average price point for Persimmons was \$1.73 in NSW and \$1.25 in VIC. Week 6 in New South Wales presented the highest price point with an average cost of \$2.99 per unit. The lower than anticipated sales in week 6 in New South Wales can be attributed to the high price point as illustrated above.

Purchase Behaviour

If a sampled consumer did not purchase Brand Ambassadors asked out of taste, price or quality what was their main reasoning. The table below outlines the results:

Reasons for not purchasing Persimmons					
State	Week	No. of assignments	Taste	Price	Quality
NSW	1	2	85%	15%	0%
	2	2	75%	13%	13%
	3	2	78%	18%	5%
	4	2	55%	35%	10%
	5	1	80%	10%	10%
	6	1	20%	60%	20%
	7	2	45%	50%	5%
	8	1	30%	70%	0%
VIC	1	1	25%	25%	50%
	2	1	20%	80%	0%
	3	1	100%	0%	0%
	4	2	55%	35%	10%
	5	1	80%	20%	0%
	6	1	100%	0%	0%
	7	1	100%	0%	0%
	8	1	50%	0%	50%
TOTAL			65%	25%	10%

Analysis

In NSW it was found that taste contributed for 60% of consumers deciding not to purchase with 33% reporting that they felt price was a barrier and 7% attributed it to quality.

In Victoria it was found that 65% of consumers decided not to purchase due to taste and only 20% said it was due to price with the remaining 15% attributing their decline of purchase to the quality of the stock in store at the time of the assignment.

Recipe Leaflet Distribution

The below table outlines the amount of Recipe Leaflets that were distributed during the campaign.

Persimmon Recipe Leaflets Distributed					
State	Week	No. of assignments	KPI	Recipe Leaflets Distributed	Average Per Assignment
NSW	1	2	136	43	22
	2	2	136	720	360
	3	2	136	100	50
	4	2	136	71	36
	5	1	68	25	25
	6	1	68	0	0
	7	2	136	90	45
	8	1	68	120	120
VIC	1	1	68	20	20
	2	1	68	180	180
	3	1	136	180	180
	4	2	136	200	100
	5	1	68	120	210
	6	1	68	5	5
	7	1	68	120	120
	8	1	68	120	120
TOTAL			68	2,114	96

Analysis

A KPI was established that an average of 68 Recipe Leaflets would be distributed per assignment. Brand Ambassadors achieved 141% of this target, distributing an average 96 Recipe Leaflets per assignment. The Recipe Leaflet was a great opportunity to showcase the everyday use of Persimmons and also communicate seasonality, storage and when to eat.

Attachment C – In-store Merchandising – Let’s Launch

Results Analysis

Stock Location - NSW

Brand Ambassadors were asked to record the located shelf space of the stock in the stores that they merchandised. The table below indicates the position of the shelf location at each store

Stock Location - NSW		
State	Store	Persimmons
NSW	Narrabeen Fruit Market	Back of store to the right
	Forest Way Fruit World	Middle of store
	Glenrose Fruit Market	Centre
	Gordon Village Fruit Market	Centre
	Harris Farm, Willoughby	Left centre
	Fruit Ezy, Chatswood	Right centre
	Fruitesh, Chatswood	Right centre
	Antico's Northbridge Fruit Centre	Left entrance
	Cammeray Fruit Market	Left middle
	Best Fruit at Mosman	Entrance
	Arenas Fruit Shop, Mosman	Right centre
	Harris Farm, Spit Junction	Centre entrance
	Losurdos Fresh, North Sydney	Centre
	Freshworld, Maroubra	Back of store to the right
	Galluzzo F J & Sons, Glebe	Left entrance
	Freshworld, Burwood	Entrance
	Borellino, Petersham	Centre of store
	Patricks's on Bellevue	Entrance to the left
	Norton St Grocer, Bondi	Middle of store
	Royal Randwick Fruit Market	Centre
	Eastgardens Fruit Centre	Centre
	Fields of Fruit, Bankstown	Right centre
	Ashfield Fruit World	Entrance to the left
	Adams Apple, Hurstville	Left
	Natures Fresh, Hurstville South	Centre
	Rainbow Fruit Market, Merrylands	Centre
	Country Growers, Parramatta	Entrance to the left
	Harris Farm, Pennant Hills	Centre entrance
	Fresh World, Castle Hill	Entrance
	Delicious Fruits, Carlingford	Front of store

Stock Location - VIC

Brand Ambassadors were asked to record the located shelf space of the stock in the stores that they merchandised. The table below indicates the position of the shelf location at each store

Stock Location - VIC		
State	Store	Persimmons
VIC	Pino's Fine Products, South Yarra	right centre
	Ashburton Fresh Fruit & Vegies	Front right fruit stand
	Fruit Valley, Ashburton	Opposite to counter
	Albert Park Fruit Place	left middle
	Glenhuntly Fruit Supply	entrance
	Colonial Fruit Company, Malvern	right centre
	Colonial Fruit Company, Ringwood	right centre
	Colonial Fruit Company, Forest Hill	Front entrance
	Hand Picked, Doncaster	Front near register
	Signorellis Fresh Choice, Balwyn	Side/Middle
	Balwyn Fruit Supply	Front/Side
	Kandis Balwyn Heights, Fruit Supply	Back of wall
	Sandringham Fruit market	right centre
	Bay Street Fruit Specialist, Brighton	Back of Fruit section
	Fruit Supply, Cheltenham	Middle
	Lammana's Fruit Market, Cheltenham	left middle
	Parkmore Fruit & Veg Market	entrance
	Chester Fruit Market, Oakleigh	right centre
	Basiles Fruit Market, Lalor	Front Middle
	Rosanna fruit Supply, Rosanna	Front Side
	Growers Fresh, Greensborough	Middle
	Cozzella Bros, Preston	Front Right side
	Biviano and Sons, Fairfield	NA
	Chesterville Fruit Supply	Front right
Sciclunas of Mentone	Back middle	
Thomas Dux, Glen Waverley	Front middle aisle	

Shelf Allocation - NSW

Brand Ambassadors were asked to record the allocated shelf space of Persimmons in the stores that they merchandised. The table below indicates how much shelf space was allocated at each store

Shelf Allocation - NSW		
State	Store	Persimmons
NSW	Narrabeen Fruit Market	1
	Forest Way Fruit World	1
	Glenrose Fruit Market	1
	Gordon Village Fruit Market	1
	Harris Farm, Willoughby	2
	Fruit Ezy, Chatswood	2
	Fruitesh, Chatswood	2
	Antico's Northbridge Fruit Centre	1
	Cammeray Fruit Market	1
	Best Fruit at Mosman	1
	Arenas Fruit Shop, Mosman	1
	Harris Farm, Spit Junction	2
	Losurdos Fresh, North Sydney	1
	Freshworld, Maroubra	2
	Galluzzo F J & Sons, Glebe	2
	Freshworld, Burwood	2
	Borellino, Petersham	2
	Patricks's on Bellevue	1
	Norton St Grocer, Bondi	2
	Royal Randwick Fruit Market	2
	Eastgardens Fruit Centre	2
	Fields of Fruit, Bankstown	2
	Ashfield Fruit World	2
	Adams Apple, Hurstville	1
	Natures Fresh, Hurstville South	1
	Rainbow Fruit Market, Merrylands	2
	Country Growers, Parramatta	2
	Harris Farm, Pennant Hills	2
Fresh World, Castle Hill	1	
Delicious Fruits, Carlingford	1	

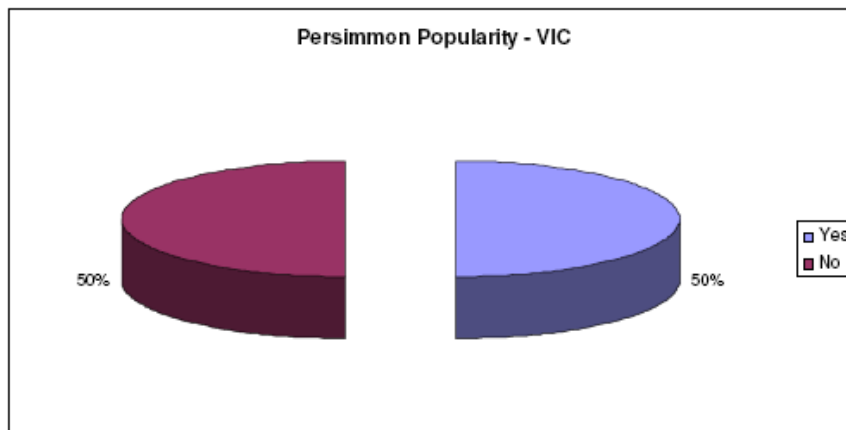
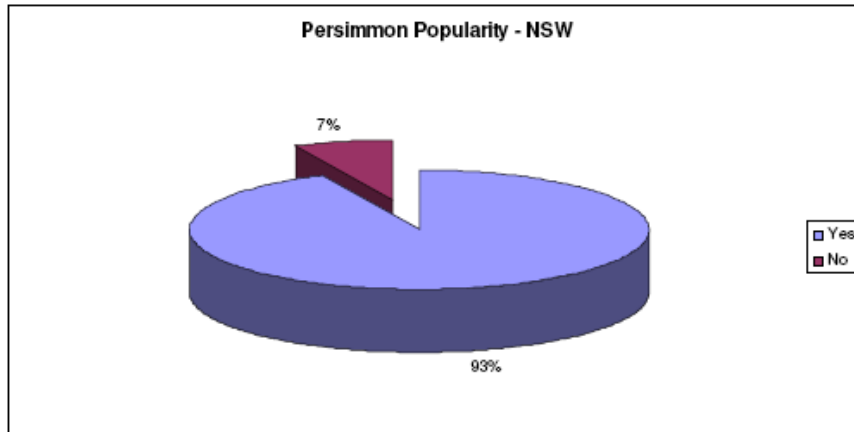
Shelf Allocation - VIC

Brand Ambassadors were asked to record the allocated shelf space of Persimmons in the stores that they merchandised. The table below indicates how much shelf space was allocated at each store

Shelf Allocation - VIC		
State	Store	Persimmons
VIC	Pino's Fine Products, South Yarra	1
	Ashburton Fresh Fruit & Vegies	1.5
	Fruit Valley, Ashburton	1
	Albert Park Fruit Place	1
	Glenhuntly Fruit Supply	1
	Colonial Fruit Company, Malvern	1.5
	Colonial Fruit Company, Ringwood	1
	Colonial Fruit Company, Forest Hill	1
	Hand Picked, Doncaster	1
	Signorellis Fresh Choice, Balwyn	1
	Balwyn Fruit Supply	1
	Kandis Balwyn Heights, Fruit Supply	2
	Sandringham Fruit market	1
	Bay Street Fruit Specialist, Brighton	1
	Fruit Supply, Cheltenham	1
	Lammana's Fruit Market, Cheltenham	2
	Parkmore Fruit & Veg Market	1
	Chester Fruit Market, Oakleigh	2
	Basiles Fruit Market, Lalor	1
	Rosanna fruit Supply, Rosanna	1
	Growers Fresh, Greensborough	2
	Cozzella Bros, Preston	2
	Biviano and Sons, Fairfield	0
	Chesterville Fruit Supply	1
Sciclunas of Mentone	2	
Thomas Dux, Glen Waverley	1	

Staff Opinion

Brand Ambassadors were required to report whether, according to the store employees, Persimmons are a popular choice with their customers. They were required to report either a yes or a no response. This is illustrated in the graphs below.



Analysis

Store managers in NSW reported that Persimmons are a popular choice with consumers with 93% of stores agreeing that the majority of their customers looked favourably upon the product. In VIC however, only 50% of stores deemed Persimmons to be a popular choice with their customers.

Average Weekly Sales - NSW

Brand Ambassadors asked staff members what the volume of sales were in their stores per week, the results of which are illustrated in the below table.

Weekly Sales - NSW		
State	Store	Sales (units)
NSW	Narrabeen Fruit Market	80
	Forest Way Fruit World	10
	Glenrose Fruit Market	40
	Gordon Village Fruit Market	200
	Harris Farm, Willoughby	100
	Fruit Ezy, Chatswood	200
	Fruitesh, Chatswood	96
	Antico's Northbridge Fruit Centre	30
	Cammeray Fruit Market	10
	Best Fruit at Mosman	30
	Arenas Fruit Shop, Mosman	20
	Harris Farm, Spit Junction	250
	Losurdos Fresh, North Sydney	200
	Freshworld, Maroubra	200
	Galluzzo F J & Sons, Glebe	20
	Freshworld, Burwood	180
	Borellino, Petersham	70
	Patricks's on Bellevue	20
	Norton St Grocer, Bondi	400
	Royal Randwick Fruit Market	100
	Eastgardens Fruit Centre	20
	Fields of Fruit, Bankstown	50
	Ashfield Fruit World	48
	Adams Apple, Hurstville	1000
	Natures Fresh, Hurstville South	20
	Rainbow Fruit Market, Merrylands	100
	Country Growers, Parramatta	100
Harris Farm, Pennant Hills	350	
Fresh World, Castle Hill	150	
Delicious Fruits, Carlingford	200	

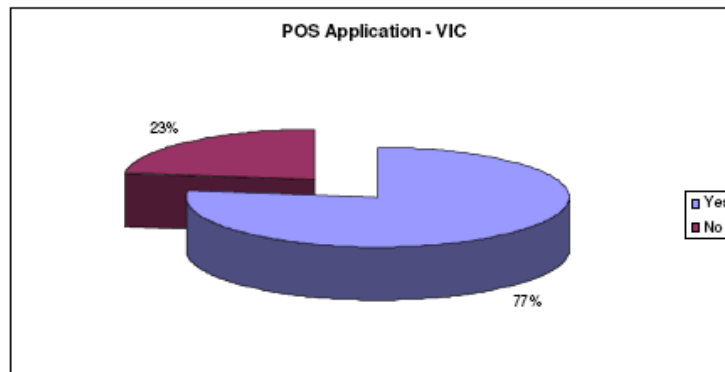
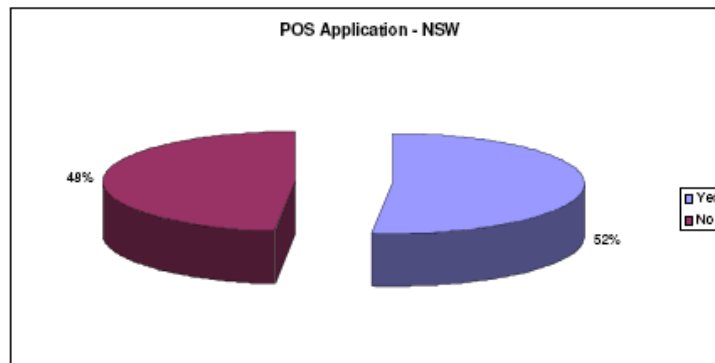
Average Weekly Sales - VIC

Brand Ambassadors asked staff members what the volume of sales were in their stores per week, the results of which are illustrated in the below table.

Weekly Sales - VIC		
State	Store	Sales (units)
VIC	Pino's Fine Products, South Yarra	80
	Ashburton Fresh Fruit & Vegies	36
	Fruit Valley, Ashburton	30
	Albert Park Fruit Place	150
	Glenhuntly Fruit Supply	30
	Colonial Fruit Company, Malvern	20
	Colonial Fruit Company, Ringwood	28
	Colonial Fruit Company, Forest Hill	40
	Hand Picked, Doncaster	120
	Signorellis Fresh Choice, Balwyn	180
	Balwyn Fruit Supply	30
	Kandis Balwyn Heights, Fruit Supply	200
	Sandringham Fruit market	40
	Bay Street Fruit Specialist, Brighton	20
	Fruit Supply, Cheltenham	10
	Lammana's Fruit Market, Cheltenham	200
	Parkmore Fruit & Veg Market	20
	Chester Fruit Market, Oakleigh	50
	Basiles Fruit Market, Lalor	400
	Rosanna fruit Supply, Rosanna	60
	Growers Fresh, Greensborough	400
	Cozzella Bros, Preston	400
	Biviano and Sons, Fairfield	60
	Chesterville Fruit Supply	75
Sciclunas of Mentone	35	
Thomas Dux, Glen Waverley	12	

Application of POS

Brand Ambassadors upon arrival in-store asked store managers if they were allowed to apply the POS for them in their store. They were required to report either a yes or a no response and the below table indicates how many store managers allowed Brand Ambassadors to apply the POS for them.



Analysis

Whilst the majority of store managers in VIC (77%) allowed the Brand Ambassadors to apply the POS themselves in store 48% of stores in NSW did not allow the Brand Ambassadors to apply POS, preferring to do it themselves.

POS Applied in store

Brand Ambassadors recorded what they applied in the stores that they merchandised. The below table indicates the amount of POS applied across the stores in NSW and VIC.

POS Applied In Store			
State	Back of House Poster	Recipe pads	Total POS
NSW	16	68	84
VIC	20	92	112
Total	35	156	196

POS Left In-Store

In the instance that store managers did not allow Brand Ambassadors to apply the POS, the Brand Ambassadors left the POS with the manager and asked them to apply it on the day or within the next couple of days.

POS Left In Store			
State	Back of House Poster	Recipe pads	Total POS
NSW	14	52	66
VIC	6	12	18
Total	20	64	84

In Store Terminology - NSW

Brand Ambassadors reported how the Persimmons were described in store. The below table outlines the various descriptions used.

How are Persimmons described in store?		
State	Store	Description
NSW	Narrabeen Fruit Market	Persimmon
	Forest Way Fruit World	Persimmon - Sweet
	Glenrose Fruit Market	Persimmon
	Gordon Village Fruit Market	Persimmons
	Harris Farm, Willoughby	Persimmons
	Fruit Ezy, Chatswood	Persimmon
	Fruitesh, Chatswood	Fuji Fruit
	Antico's Northbridge Fruit Centre	Persimmon
	Cammeray Fruit Market	Persimmon
	Best Fruit at Mosman	Persimmon
	Arenas Fruit Shop, Mosman	Persimmon
	Harris Farm, Spit Junction	Persimmon
	Losurdos Fresh, North Sydney	Fuji fruit
	Freshworld, Maroubra	Fuji fruit
	Galluzzo F J & Sons, Glebe	Persimmon
	Freshworld, Burwood	Persimmon
	Borellino, Petersham	FujiFruit
	Patricks's on Bellevue	Persimmons
	Norton St Grocer, Bondi	Fuyu Persimmon
	Royal Randwick Fruit Market	Persimmons
	Eastgardens Fruit Centre	Persimmons
	Fields of Fruit, Bankstown	Sweet Persimmon
	Ashfield Fruit World	Fuji Fruit
	Adams Apple, Hurstville	Fuji Fruit
	Natures Fresh, Hurstville South	Persimmons
	Rainbow Fruit Market, Merrylands	Perssimons
	Country Growers, Parramatta	Fuji Fruit
	Harris Farm, Pennant Hills	Fuyu Persimmon
	Fresh World, Castle Hill	Persimmons
	Delicious Fruits, Carlingford	Persimmons

In Store Terminology - VIC

Brand Ambassadors reported how the Persimmons were described in store. The below table outlines the various descriptions used.

How are Persimmons described in store?		
State	Store	Description
VIC	Pino's Fine Products, South Yarra	Persimmon
	Ashburton Fresh Fruit & Vegies	Persimmon
	Fruit Valley, Ashburton	Persimmon
	Albert Park Fruit Place	Fuji Fruit
	Glenhuntly Fruit Supply	Persimmons
	Colonial Fruit Company, Malvern	Persimmon
	Colonial Fruit Company, Ringwood	Queensland New season persimmons
	Colonial Fruit Company, Forest Hill	Persimmon
	Hand Picked, Doncaster	Persimmon
	Signorellis Fresh Choice, Balwyn	Persimmons Product of Australia
	Balwyn Fruit Supply	Persimmons
	Kandis Balwyn Heights, Fruit Supply	Persimmon
	Sandringham Fruit market	Fuji Fruit
	Bay Street Fruit Specialist, Brighton	Persimmon
	Fruit Supply, Cheltenham	Persimmon
	Lammana's Fruit Market, Cheltenham	Persimmon
	Parkmore Fruit & Veg Market	Persimmon
	Chester Fruit Market, Oakleigh	Persimmon
	Basiles Fruit Market, Lalor	*Persimmon*
	Rosanna fruit Supply, Rosanna	No description
	Growers Fresh, Greensborough	*Persimmon Product of Australia*
	Cozzella Bros, Preston	*Persimmon - Taste the difference*
	Biviano and Sons, Fairfield	No description
	Chesterville Fruit Supply	"Just as Persimmon"
Sciclunas of Mentone	Sciclunas Persimmon	
Thomas Dux, Glen Waverley	No description	

Price Point

Brand Ambassadors were required to report on the price point of Persimmons during their assignment. These results are illustrated by the following table.

Persimmons Price Point			
State	Week	Total number of stores visited	Average price per unit
NSW	1	17	\$1.16
	2	13	\$1.53
VIC	1	6	\$1.23
	2	12	\$2.01
	3	8	\$1.53

Attachment D – Research Reports

Sydney Markets Research

Persimmon Supply Chain Research Update 05.06.09

Overview

A recent retailer education campaign identified that there is a potential gap in our knowledge with regards to the availability of astringent persimmons in Australia. It was previously assumed that astringent persimmons made up less than 10% of the market and availability was limited. The campaign found that 12 out of 17 stores in metropolitan Sydney ranged both varieties. This has raised a question around the strategy to rename non-astringent persimmons 'Sweet Persimmons'.

On behalf of Persimmons Australia, HAL has conducted interviews with wholesalers at the Sydney markets and independent retailers in the Sydney metropolitan area to gather additional information to help assess the next steps to be taken. One Sydney grower was also interviewed.

A number of key themes emerged.

- Ranging of the two varieties varies dramatically and it is primarily governed by the ethnicity of the surrounding suburbs. In areas that are characterized as having a high proportion of people of European heritage ranging of astringent persimmons is greater, even up to 100% astringent. In areas with a high Asian population the reverse appears to be true however no stores visited ranged only non-astringent persimmons.
- Most retailers agree that non-astringent persimmons are more popular with those who are of Australian descent however that, in the main, Australians are unfamiliar with the fruit and do not represent the core customer base.
- No retailers used the name Sweet Persimmons for the non-astringent variety; they used Fuyu or Fuji fruit.
- All astringent persimmons were called Persimmons.
- It is rare for the fruit to be ranged side-by-side.
- Many wholesalers and retailers believe the future is in the non-astringent variety and like the ease of handling, good texture and consistency. They feel that the fruit is still relatively unknown and the best promotion is sampling. Quite a number of retailers said that when they sample in-store themselves the fruit is very easy to sell.
- Wholesalers and the one grower interviewed believe that there is almost no distribution of the astringent variety in the major chains except as a specialty line on an ad hoc basis.

Further to this there are a number of other relevant factors:

- It is believed that the majority of astringent Persimmon orchards in Australia are based in and around the Sydney region.
- It's important to remember that the results above are from a metropolitan area.
- Based on Woolworths scan data for the 2008 year the volume split by state was:

NSW 44%
VIC 20%
QLD 16%
SA/NT 2%
WA 17%
TAS 1%

- Woolworths has made the name change is non-astringent are called Persimmons on their website.
- Based on this initial information and other industry data we estimate distribution as follows:

Assumptions

- Woolworths sold 555 units equating to 138,950 kg in 2008
- Coles sold the same number of units over the same period
- Levies were collected on 1,871 MT in 2008
- The major chains only sell the non-astringent variety
- The astringent variety represents 10% total volume

Distribution	Astringent	Non-Astringent
Independent Retailers	187 MT (10%)	1,408 MT (75%)
Major Grocery Chains		276 MT (15%)

Next Steps

- Further consultation with industry and wholesalers/retailers in another market
- Analysis of available data and growth rates – identify trends and opportunity areas for retailers
- Develop a presentation of industry plans for use in talking with major retailers

Considerations & Constraints

Engaging with the major grocery chains, whilst important, needs to be approached carefully. It represents an opportunity to present the Persimmon industry plans and collaborate to drive growth in the exotic/sub-tropical segment. However we need to develop a strong, professional approach that demonstrates the potential of Persimmons to category buyers.

 Persimmons Supply Chain Research Discussion Update 13.05.09

Background

During April 2009 HAL conducted a campaign on behalf of Persimmons Australia to educate produce managers and their staff about Sweet Persimmons. This was executed via brand representatives who communicated key messaging around seasonality, storage, merchandising, selection and when to eat.

Brand representatives also actively encouraged retailers to label the product Sweet Persimmons to help highlight to consumers that this variety is sweet when eaten firm as opposed to the 'old' variety of persimmon which could only be eaten soft.

A key assumption was that there is limited availability of Astringent Persimmons in Australia. Feedback from the campaign showed that Astringent Persimmons are available, at least in the top tier of independent grocers (in Sydney 12 out of 17 stores ranged both varieties). These retailers were reluctant to label non-astringent persimmons 'Sweet Persimmons' because they argue that the astringent variety also becomes very sweet when soft. Where both varieties were ranged, retailers reported that the astringent is more popular because it is the older, better known variety.

In researching the matter, HAL understands that Sweet Persimmons were actively promoted as Fuji Fruit in Australia prior to 2006. In 2006 a research study was commissioned and from this a recommendation was made to promote the non-astringent variety as Sweet Persimmons. The rationale was:

- a) to clearly distinguish the non-astringent variety from the astringent variety and surmount any poor experiences consumers may have had previously with the astringent variety.
- b) To clearly define persimmons as a fruit and overcome any confusion relating to it's similarity in appearance to a tomato
- c) To give Persimmons a more Australian sounding name
- d) To capitalize on 'sweet' as an evocative descriptor

Again an assumption was made that Astringent persimmons accounted for 10% of the market and were declining.

Further to this, the 5 year strategic plan (draft) has highlighted confusion around name (conflicting information to consumer/branding issue) and low consumer awareness of product (particularly newer non-astringent varieties) as key weaknesses for the Persimmon industry.

The above highlights that not only do we have a potential knowledge gap in our understanding of the market but that we need to rectify it before commencing any further planning. In particular it would be unwise to proceed with a consumer research project at this stage.

After discussion with the IAC, we have agreed to execute a series of supply chain interviews to gain clarity around the matter before progressing further.

Suggested Scope

Growers/Industry

Wholesalers, Sydney & Melbourne

Retailers, Sydney & Melbourne

Suggested Format

Collation of any data available

A range of informal and formal interviews depending upon target. Retailer interviews should be conducted with an industry representative.

HAL will conduct preliminary informal interviews with key wholesalers at the Sydney Markets to gain some initial feedback.

Key Questions

Distribution

1. What is the volume split between Astringent vs Non-Astringent Persimmons?
2. Does this differ by channel?

In-store Merchandising

3. How are Astringent and Non-Astringent Persimmons currently labeled?
4. Does this differ by channel?

Stakeholder Beliefs

5. How do stakeholders refer to each type of Persimmon?
6. Which Persimmon is the most popular?
7. Does this differ by consumer type/age/ethnicity?
8. What would you call Persimmons? Why?

Desired Outcomes

An estimate of the market split of astringent versus non-astringent persimmons to aid in strategic and marketing planning.

Next Steps

Item	Resp	Deadline
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Review discussion paper, provide feedback	ALL	11 May
Confirm scope and format	ALL	15 May
Confirm questions	ALL	15 May
Confirm timeline	HAL	15 May
Interviews	ALL	TBC

Interview Results Summary

Wholesalers

	Astringent	Non-Astringent
What do you call Persimmons	Persimmons	Fuyu, Fuji
Distribution of Persimmons	5-10% 5% 60% 20-30% 20% 70% 80% 99% 15%	90-95% 95% 40% 70-80% 80% 30% 20% 1% 85%
Who consumes	Europeans/Continental/Mediterranean Asians, Koreans, Vietnamese, Italian	Asian, Korean, Vietnamese, Chinese
Ranging (Independents)	Depends on ethnicity of suburb	Depends on ethnicity of suburb
Ranging (Majors)	Special line/special buy	YES

Interview Results - Wholesalers

Wholesaler: LR Moss, Sydney Markets

Date: 12.05.09

Interviewee: Darco

Labelling

Called both types Persimmons clarifying that Non-astringent persimmons are Fuyu ie: Persimmons or Persimmons (Fuyu)

Distribution

Astringent: 5-10%

Non-astringent: 90-95%

Storage

Stores in the coolroom at 10-12 degrees Celsius

Consumer

Europeans prefer Astringent variety

Asians prefer Non-astringent variety

Channel

Coles/Woolworths usually only range Non-astringent variety however will range Astringent as a special line/special buy. Astringent only a small line for independent retailers.

Other

Profitability dependent on quality not variety. Retailers rely on wholesaler for information including storage and handling.

Wholesaler: XL Fruit Traders, Sydney Markets
Date: 12.05.09
Interviewee: Tony Tesserero

Labelling

Calls non-astringent persimmons fuyu. Thinks that Fuji causes confusion with apples. Used to call astringent variety date plums.

Distribution

Astringent: 5%

Non-astringent: 95%

Think it varies a great deal and depends on the location of the store and the ethnicity of the surrounding population.

Storage

DNA

Consumer

Continental background prefer Astringent variety

Asians love non-astringent variety

Channel

DNA (don't think he deals with majors)

Other

Non-astringent good variety – much easier to handle than astringent. Astringent time consuming, messy. In Italy, non astringent also called chocolata, vanilla

Believes key is information in store and taste testing to encourage consumers to 'give it a go'.

Loved the recipe leaflets.

Wholesaler: Exotic Fruit Traders, Sydney Markets
Date: 12.05.09
Interviewee: Joe

Labelling

Prefers non-astringent are called Fuji. Fuji means hard, non-astringent

Distribution

Astringent: 10%
Non-astringent: 90%

Storage

Stores in coolroom (did not clarify temp)

Consumer

Mediterranean background prefers Astringent variety

Channel

Coles/Woolworths do not stock astringent variety (EFT is a top up supplier to the majors)

Other

Is very keen to source more stock.

Wholesaler: Apollo Fruit Supply (*NB: only stocks non-astringent, does not sell to major grocery*)
Date: 19.05.09
Interviewee: Glen Howlett

Labelling

Astringent:
Non-astringent: Fuyu/Jiro

Distribution

Independents: DNK
Majors: DNK

Storage

Not in the cold room

Consumer

Astringent: European
Non-astringent: Asians

Channel

Astringent: DNA
Non-astringent: DNA

Other

Wholesaler: Robson O'Brien
Date: 19.05.09
Interviewee: Steve O'Brien

Labelling

Astringent: Nightingale/Hychia
Non-astringent: Fuyu

Distribution

Independents: 60% volume sales are Astringent/40% volume sales are Non-Astringent
Majors: Does not sell to majors

Storage

0 degrees

Consumer

Astringent: Asians, Koreans, Vietnamese, Italian
Non-astringent: Asians, Koreans, Vietnamese

Channel

Astringent:
Non-astringent:

Other

Wholesaler: Asean
Date: 19.05.09
Interviewee: Tom

Labelling

Astringent: Persimmons
Non-astringent: Persimmons, then by variety

Distribution

Independents: Astringent 20-30%/Non-Astringent 70-80%
Majors: Does not sell to majors

Storage

Coolroom/room temperature depending upon ripeness

Consumer

Astringent: DNA
Non-astringent: Asian, Korean, Vietnamese, Chinese

Channel

Astringent:
Non-astringent:

Other

Wholesaler: Fresh Produce Group
Date: 19.05.09
Interviewee: Peter

Labelling

Astringent: Does not sell
Non-astringent: Fuyu/Fuji

Distribution

Independents: 20% Astringent/80% Non-Astringent
Majors: Does not sell to majors

Storage

DNA

Consumer

Astringent:
Non-astringent: Asian

Channel

Astringent:
Non-astringent:

Other

Peter has an Italian background and grew up with Astringent persimmons but thinks that the non-astringent variety are much better, better texture, better flavor (more consistent than apples)

Interview Results - Retailers

Retailer: Ripe Grocer, Mona Vale (small, specialty store, range of organics)
Date: 12.05.09
Interviewee: Scott (owner, has run other retail outlets on the Central Coast, Lindfield)

Labelling

Astringent: Persimmons
Non Astringent: Fuyu or Fiji

Sales

Astringent: 70%
Non-astringent: 30%

Storage

3-5% (I mentioned that this was too cold however the 'warmer' fridge has bananas and mangoes in it so wasn't quite sure where to direct him from there)

Consumer

Astringent: Koreans, Europeans, Jewish, Italians
Non-astringent: Asians

Barriers to purchase

Ignorance, lack of knowledge is preventing sales of Fuyu.

Other

Had a good understanding of Persimmons, knew all the different varieties for both.
Thinks that we need more stories in the press and recipes.
Need tastings.

Retailer: Russo's Mona Value (medium to large sized store, medium quality)
Date: 12.05.09
Interviewee: Vic

Labelling

Astringent: Persimmons
Non Astringent: Fuyu

Sales

Astringent: 80%
Non-astringent: 20%

Storage

Room Temperature

Consumer

Astringent: Europeans
Non-astringent: Asian

Barriers to purchase

Astringent are messy fruit to handle and eat.
Confusion about the two different varieties (means naming must be different)

Other

Eating a persimmon is like eating 3 eggs – they are that good for you – so if a consumer has an egg intolerance they can eat Persimmons

Retailer: Forestway Fresh (large store, super premium quality)
Date: 12.05.09
Interviewee: Tony

Labelling

Astringent: Persimmons
Non Astringent: Fuji

Sales

Astringent: 99%
Non-astringent: Only stock NA as a special line occasionally

Storage

5 degrees when ripe
13 degrees when unripe

Consumer

Astringent: European, Older Women
Non-astringent: Asians

Barriers to purchase

DNA

Other

Need to be promoted more, would like demos, need usage suggestions such as use on top of a fruit salad.
Not many Asians in the area

Interview Results - Growers

Grower: Cobbitty, Camden (grows both types)

Date: 19.05.09

Interviewee: Brett 0425 247 136

Labelling

Astringent: Sells as Hachiya

Non-astringent: Sells as Fuyu (thinks that Fuji, while used, is confusing with apples)

Thinks that retail buyers see Persimmons = soft; Fuyu=different sort of fruit altogether

Distribution

Independents: Astringent are a niche, specialty product mostly ranged in Independent retailers. Non-Astringent are ranged in independent stores

Majors: Imported Astringent are sometimes ranged in WW when Australian persimmons are out of stock. Non-Astringent persimmons are ranged in the niche product area (with fruits such as longosteens).

Consumer

Astringent: Koreans, Italians, Europeans

Non-astringent:

Channel

Astringent: 15%

Non-astringent: 85%

Other

**Persimmon Research Report- Melbourne Markets - Australian Produce Group
Wednesday December 9 2009**

HAL's desired outcome

To estimate of the market split of astringent versus non-astringent persimmons to aid in strategic and marketing planning.

Sample size and location

- ⇒ Four (4) wholesalers and five (5) retailers
- ⇒ Melbourne Wholesale Markets and various suburbs throughout greater Melbourne

Key survey questions provided by HAL:

Distribution

1. What is the volume split between Astringent vs Non-Astringent Persimmons?
2. Does this differ by channel?

In-store Merchandising

3. How are Astringent and Non-Astringent Persimmons currently labelled?
4. Does this differ by channel?

Stakeholder Beliefs

5. How do stakeholders refer to each type of Persimmon?
6. Which Persimmon is the most popular?
7. Does this differ by consumer type/age/ethnicity?
8. What would you call Persimmons? Why?

Wholesaler Survey Response

APG spoke with four Wholesaler Agents from the Melbourne Produce Markets. In summary they were very happy to know their thoughts would be taken into account. Nearly all agents wanted to provide extra comments. Comments were generally in relation to increasing promotional tools they can offer to their customers (the retailer).

Key findings;

- ✓ It was very clear that the type of Persimmon they preferred to sell was Non-Astringent, hard and well coloured.
- ✓ The Asian market pushes the demand for larger-softer product
- ✓ Agents referred to the product as a Persimmon.

Key Questions & Responses:

Distribution

Q.1 What is the volume split between Astringent vs Non-Astringent Persimmons?

- ⇒ 80 Non-Astringent/20 Astringent
- ⇒ Fuyu most popular – 80 Non-Astringent/20 Astringent, retailers see Astringent type as being over ripe and not shelf stable
- ⇒ 100% Non-Astringent
- ⇒ 80-90% Non-Astringent

Q.2 Does this differ by channel? If so how?

- ⇒ No difference
- ⇒ Asian market likes Astringent / Australian market likes firm Non-Astringent
- ⇒ All our sales are for 100% Non-Astringent cultivars so we don't have a variation in the various channels.
- ⇒ Softer fruit – so Astringent is generally popular with Asian buyers

In-store Merchandising

Q.1 How are Astringent and Non-Astringent Persimmons currently labelled?

- ⇒ Retailer are fussy they want stickers on each piece of fruit or there not happy, they call them Persimmons.
- ⇒ They are a given a similar shelf space to the equivalent of what Limes get, ½ metre at an absolute maximum
- ⇒ With an industry PLU and some grower branding e.g. Golden Sweet, Sweet Gold. In store merchandising sometimes refers to them as “Sweet Persimmons”. Supermarket programs require a PLU and are supported by Ticket Toppers in store to describe them and provide product information. We have used pre-packed product for our export program to assist in delivering key messages.
- ⇒ Stickered and labeled, in store they are taken out of the cases and place on shelf. Most stores have price tickets that use small product descriptions for them. They tend to word them as Persimmons.

Q.2 Does this differ by channel?

- ⇒ No
- ⇒ No
- ⇒ We do see some variation in merchandising, independence vs Woolworths
- ⇒ Not for us

Stakeholder Beliefs

Q.1 How do stakeholders refer to each type of Persimmon?

- ⇒ Ask for Fuyu’s by name
- ⇒ Give me the hard Persimmons, I don’t want soft
- ⇒ Varies from; Non-Astringent, Persimmons, Sweet Persimmons, Fuyu, Sharon Fruit
- ⇒ Fuyu or Persimmon

Q.2 Which Persimmon is the most popular?

100% of Wholesale agents said Non-Astringent, they answered the question;

- ⇒ Fuyu, best eating
- ⇒ Fuyu variety
- ⇒ Non-Astringent

⇒ Fuyu as it sells better for my customers, holds better on shelf for longer

Q.3 Does this differ by consumer type/age/ethnicity?

⇒ Asian market in Melbourne determine it

⇒ Asians prefer the larger fruit

⇒ It does vary, mainly hard small fruit is popular with Anglo's and larger softer fruit is popular with Asian market

⇒ A little with Asian buyers, they like a bigger type

Q.4 What would you call Persimmons? Why?

⇒ Persimmons, because I have the knowledge and understand it's a Fuyu

⇒ Persimmons, because it's easier to say than Fuyu

⇒ Sweet Persimmon, I think it helps identify with the sweet firm characteristics of the product.

⇒ Persimmon

Other comments given

⇒ Need to promote the products vanilla flavour and educate people on the health facts, a banner for our wholesale stand would be great

⇒ Maybe one of the Master Chef's could cook with them

⇒ Whatever is done, keep the messages simple

Retailer Survey Response

APG meet and spoke with five independent greengrocers from Melbourne suburbs; Kew, Ashburton, Chadstone, Mentone and Doncaster East. Much like the wholesaler agents all retailers were happy to be included in this research activity.

Key findings;

- ✓ Non-Astringent proved the most popular with all commenting that European/Asian customers like the product softer.
- ✓ Each retailer used their own price ticketing and included either a small amount of information on lesser known fruits such as the Persimmon or prompted interest with key words such as “sweet” or “hard eating”.
- ✓ Customers who ate Persimmons would ask for them as a Persimmon however one retailer commented that younger people just don’t know about the fruit and would never ask for it.
- ✓ Each retailer mentioned sampling of the product was still the best way they moved product, not just Persimmon but any product especially the lesser known.
- ✓ Retailers would welcome any material they could use in store that would educate their customers as long as it was attractive.

Key Questions & Responses:

Distribution

Q.1 What is the volume split between Astringent vs Non-Astringent Persimmons?

- ⇒ Fuyu only
- ⇒ Both varieties 50/50 split
- ⇒ Varies on the time during in the season, early on its more Astringent and later Non-Astringent
- ⇒ Fuyu most popular by far
- ⇒ Fuyu 90% / Astringent 10%

Q.2 Does this differ by channel? If so how?

- ⇒ During the week our customer is older ethnic type and on weekends more Anglo however if they like Persimmons they are happy with the Fuyu we buy
 - ⇒ Asian & European’s like them softer
-

- ⇒ Not much differently, they tend to sell as well as each other for us.
- ⇒ Europeans ask for soft fruit
- ⇒ Not really

In-store Merchandising

Q.1 How are Astringent and Non-Astringent Persimmons currently labelled?

- ⇒ We hang educational/promotional material next to price tickets, our size is A3 frames. If we don't get material, we just create a little product information sheet ourselves and laminate this. We give them a ½ metre space when they are good otherwise two across and up other times. We sit each Persimmon in tissue to give it a premium edge.
- ⇒ We call them Persimmons, we use price tickets with tips on how to enjoy them, we give them a row on our displays mainly because they are not an everyday product.
- ⇒ We label them as Persimmons but say "hard eating" or "soft eating" depending what's on shelf that day.
- ⇒ Price ticketing used to include a little bit of information on them however we like to do this ourselves because we can ensure it fits with our store look and feel. Our ticket sizes range from postcard size to A5.
- ⇒ We refer to them as persimmons using price tickets, it would be nice to have some leaflets we could place in the stacks

Q.2 Does this differ by channel?

- ⇒ No
 - ⇒ Not really, we do have a mixed customer base but our store is in a popular area for Italians to live but that's why we have a variety split.
 - ⇒ No
 - ⇒ We are more boutique store, our customer base is mainly wealthy Anglos they really don't like the soft fruit. We like to tell our customers that they taste like vanilla or custard.
 - ⇒ My market is early 30's/young families/Anglo Saxon so we don't have too many requests for Astringent type
-

Stakeholder Beliefs

Q.1 How do stakeholders refer to each type of Persimmon?

- ⇒ 90% say or ask for Persimmon, the others would ask for Fuyu
- ⇒ No young people ask for them so we need to educate and sampling would help, older people who buy them will just ask for Persimmons.
- ⇒ Persimmon
- ⇒ Persimmon
- ⇒ Sweet Persimmon

Q.2 Which Persimmon is the most popular?

100% of retailers said that Non-Astringent was the most popular of the two varieties, they commented;

- ⇒ Fuyu
- ⇒ The hard variety
- ⇒ Hard eating
- ⇒ Hard eating
- ⇒ Non-Astringent

Q.3 Does this differ by consumer type/age/ethnicity?

- ⇒ Not really in my store
- ⇒ Yes a little, the softer type is bought more by European shoppers
- ⇒ Older customers prefer the soft variety
- ⇒ Probably does but not really relevant in our store
- ⇒ I have heard it does yes, Asians like large fruit

Q.4 What would you call Persimmons? Why?

- ⇒ Persimmon, I've just been brought up to know that is their name
 - ⇒ Persimmon, that's just what I've been trained to call them
 - ⇒ Persimmon
 - ⇒ Fuyu in the UK where I am from but everyone here calls them Persimmon
-

Other comments given

- ⇒ In store tastings will really help this product because for many it's unknown, our best days for sampling is Friday/Monday or Saturday.
- ⇒ Fruit with a stronger colour is preferred as it sells much better than lighter coloured fruit, it would be good to see a bit of media around the product it would help grow the demand. Perhaps recipes or even just how to eat them.
- ⇒ Sampling will help us sell more
- ⇒ It's really important for the product to be in excellent condition and the bright colour is a better seller.

Conclusion

Non-Astringent was strongly the preferred variety by both the retailer and the consumer. There is some level of demand from Europeans and Asians for larger softer fruit and findings would suggest a targeted sales strategy is required to continue growth of the Astringent variety.

Both retailers and wholesalers alike referred to both varieties as Persimmons and deep coloured fruit was preferred.

Retailers and wholesalers would welcome educational material and sampling in store to assist in growing product awareness amongst consumers.

Newspoll Study - Consumers



September 2009

Persimmon Study

Job No: E090901

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1. Background, objectives and methodology

- Horticulture Australia Limited (HAL) was interested in investigating whether Australians are able to correctly identify different types of persimmons, and also see how often Australians are consuming these two different types of persimmons. It was thought there might be some confusion in the marketplace because a variety of different names are used for persimmons.
- This study was conducted among n=1218 adults aged 18-64 nationally on 3 - 6 September, 2009.
- Respondents were drawn from the online consumer panel managed by Lightspeed Research, Newspoll's online partner.
 - sample quotas were set for each state, city and regional area, by sex and age.
 - respondents were invited to participate in the survey, subject to a pre-screening process.
- To help reflect the overall population distribution, results were post-weighted to Australian Bureau of Statistics data on age, highest level of schooling completed, sex and area.

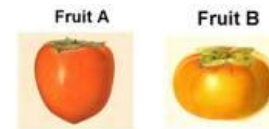
ISO 20252 - Market, Social and Opinion Research

- This study was carried out in compliance with ISO 20252 - Market, Social and Opinion Research.

2. Executive summary



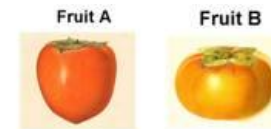
Executive Summary



- The survey reveals very similar results for both fruits on the names associated with them and how often the fruits are eaten.
- The proportion of Australians who call Fruit A a persimmon is slightly higher than the proportion that call Fruit B a persimmon (29% vs 23% respectively).
- The proportion of Australians who call Fruit A a sweet persimmon, Fuji fruit, or Fuyu fruit are similar to the levels found for Fruit B. We understand Fruit A is called a persimmon, while Fruit B is known as persimmon, sweet persimmon, Fuji fruit, or a Fuyu fruit. Given respondents are just as likely to use sweet persimmon, Fuji fruit, and Fuyu fruit for Fruit A as for Fruit B suggests there is some confusion on the names of these fruits.
- Females, older people aged 35-64, people in Western Australia and people with a "persimmon familiar ethnic background"¹, are more likely to say Fruit A is a persimmon, compared to their counterparts.
- While for fruit B, females, people in Western Australia and people with a "persimmon familiar ethnic background"¹, are more likely to say this is a persimmon, compared to their counterparts. Younger people aged 18-24 are just as likely to call Fruit B a sweet persimmon as they are to call it a persimmon. Younger people are also more likely to use the other names for Fruit B, compared to older people.
- Just over one-in-five Australians say they eat either Fruit A or Fruit B at least once during the Australian persimmon season. Almost one-in-ten Australians eat either Fruit A or Fruit B once a month during the season.
- Perhaps the results for the different fruits are so similar because of people's confusion over which fruit is which. Or perhaps people think of these fruits as interchangeable with one another (like how some people use regular tomatoes when roma tomatoes are not available).
- Younger people aged 18-34, people in the five capital cities (Sydney, Melbourne, Brisbane, Adelaide and Perth), and people with a "persimmon familiar ethnic background"¹ are more likely to eat Fruit A or B, compared to their counterparts.

¹"Persimmon familiar ethnic background" - people with a French, Italian, Spanish, Chinese or Japanese ethnic background

Executive Summary (continued)



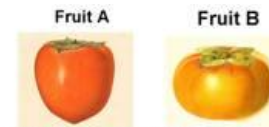
- We understand the two different fruits – Fruit A and B – are quite different in taste, and how long they are ripe for, so it does appear to be important to help consumers differentiate between the two fruits, in order to ensure they are eating the fruit when it is ripe, as this is most likely to help them achieve a positive experience and encourage them to eat the fruit again in the future.
- We understand HAL is attempting to improve awareness of the fruit through a number of different initiatives. The results of the study would suggest those with a "persimmon familiar ethnic background"¹ are the ones most likely to respond to positive messaging of persimmons to reinforce their existing knowledge and understanding. However, it is also important to realise this group reflects only a small percentage of the population, therefore it is also very important to encourage the broader population to try persimmons. The results indicate females, younger people, people in the cities or Western Australia are more likely to be a receptive target of positive messages about persimmons.
- Given many Australians are not familiar with this fruit it would also seem a good idea to try to expose more Australians to the fruit so they can consider it in their future consumption patterns. In particular, your current approach of suggesting how to include persimmons in recipes sounds like a good idea. It may also be worth looking at how those who currently eat persimmons include them in their diet, in case there are any options there that might appeal to the broader public.

¹"Persimmon familiar ethnic background" - people with a French, Italian, Spanish, Chinese or Japanese ethnic background

3. Research findings



3.1 Name associate with each type of fruit

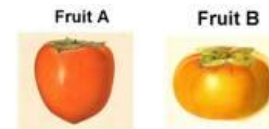


- Figure 1a - Three-in-ten (29%) Australians call Fruit A a persimmon, while the proportion of Australians who call Fruit B a persimmon is slightly lower (23%).
- 12% of Australians call Fruit B a sweet persimmon, 7% call it a Fuji fruit, and 5% call it a Fuyu fruit. A total of 42% of Australians call Fruit B any of the 4 names provided.
- The proportion of Australians who call Fruit A a sweet persimmon, Fuji fruit, or Fuyu fruit are similar to the levels found for Fruit B. We understand Fruit A is called a persimmon, while Fruit B is known as a persimmon, sweet persimmon, Fuji fruit, or a Fuyu fruit. Given respondents are just as likely to use sweet persimmon, Fuji fruit, or Fuyu fruit for Fruit A as for Fruit B suggests there is some confusion on the names of these fruits.

By demographics (Figure 1b-1c)

- Females are more likely than males to call each fruit a persimmon. This is true for both Fruit A (female 34% vs male 24%) and B (female 27% vs male 19%). Perhaps this is not surprising given females are more likely than males to do the grocery shopping or watch cooking shows in which the fruit might be featured.
- Similar proportions of males and females give Fruit A and Fruit B the names sweet persimmon (around 12%), Fuji fruit (around 7%), and Fuyu fruit (around 5%).
- Generally, the pattern by age mirrors the overall pattern for each fruit. However people aged 18-24 appear to be a little more likely to also use the names sweet persimmon, Fuji fruit, Fuyu fruit for both fruits A and B, compared to older people. (However these differences are not statistically significant.)
- Younger people aged 18-24 are just as likely to call Fruit B a sweet persimmon as call it a persimmon, which contrasts directly from the overall pattern.
- Older people aged 35-49 and 50-64 appear to be more likely to call Fruit A a persimmon, compared to younger people. Older people are also more likely to call Fruit A a persimmon than call Fruit B a persimmon. This suggests older people are more familiar with fruits that look like Fruit A being called a persimmon, than ones that look like Fruit B.

3.1 Name associate with each type of fruit



By demographics continued (Figure 1b-1c)

- People in the five capital cities (Sydney, Melbourne, Brisbane, Adelaide and Perth) are just as likely to use each name for each fruit, as people in the remaining areas (X-city). In other words, the patterns reflect the overall total results.
- People in Western Australia (39%) are more likely to call Fruit A a persimmon, compared to people from other states. People from Western Australia (13%) are more likely to call Fruit B a Fuji fruit, compared to people from other states.
- People in Queensland are more likely to call Fruit A a sweet persimmon, compared to NSW and Victoria.
- People in NSW are more likely to call Fruit A a Fuji fruit, compared to Victoria, Queensland and South Australia.
- Overall, people with a French, Italian, Spanish, Chinese or Japanese background (ie a "persimmon familiar ethnic background") are more likely to associate Fruit A or Fruit B with one of the four names, compared to those without this background (Fruit A 70% vs 42% respectively; Fruit B 66% vs 40%). This is also true for each of the names individually (with the exception of Fuyu fruit for Fruit B). In other words, those who are more likely to have been exposed to this fruit, due to their ethnic background, appear to be more likely to associate the fruit with each of the names provided.
- Interestingly, those with the "persimmon familiar ethnic background" are almost just as likely to call Fruit A a sweet persimmon (26%) as a persimmon (35%), which we believe is actually incorrect. In contrast, those with the "persimmon familiar ethnic background" are much more likely to call Fruit B a persimmon (41%) than call it a sweet persimmon (18%). So even among those who appear to be more familiar with the fruit, there is some confusion over which names apply.

Name associate with each type of fruit

Now thinking about **fruit**. In the picture shown, there are **two different varieties** of a particular fruit. Please indicate which names you **personally** associate with each of the fruits shown, or if you are not sure. (Select all that apply per column)

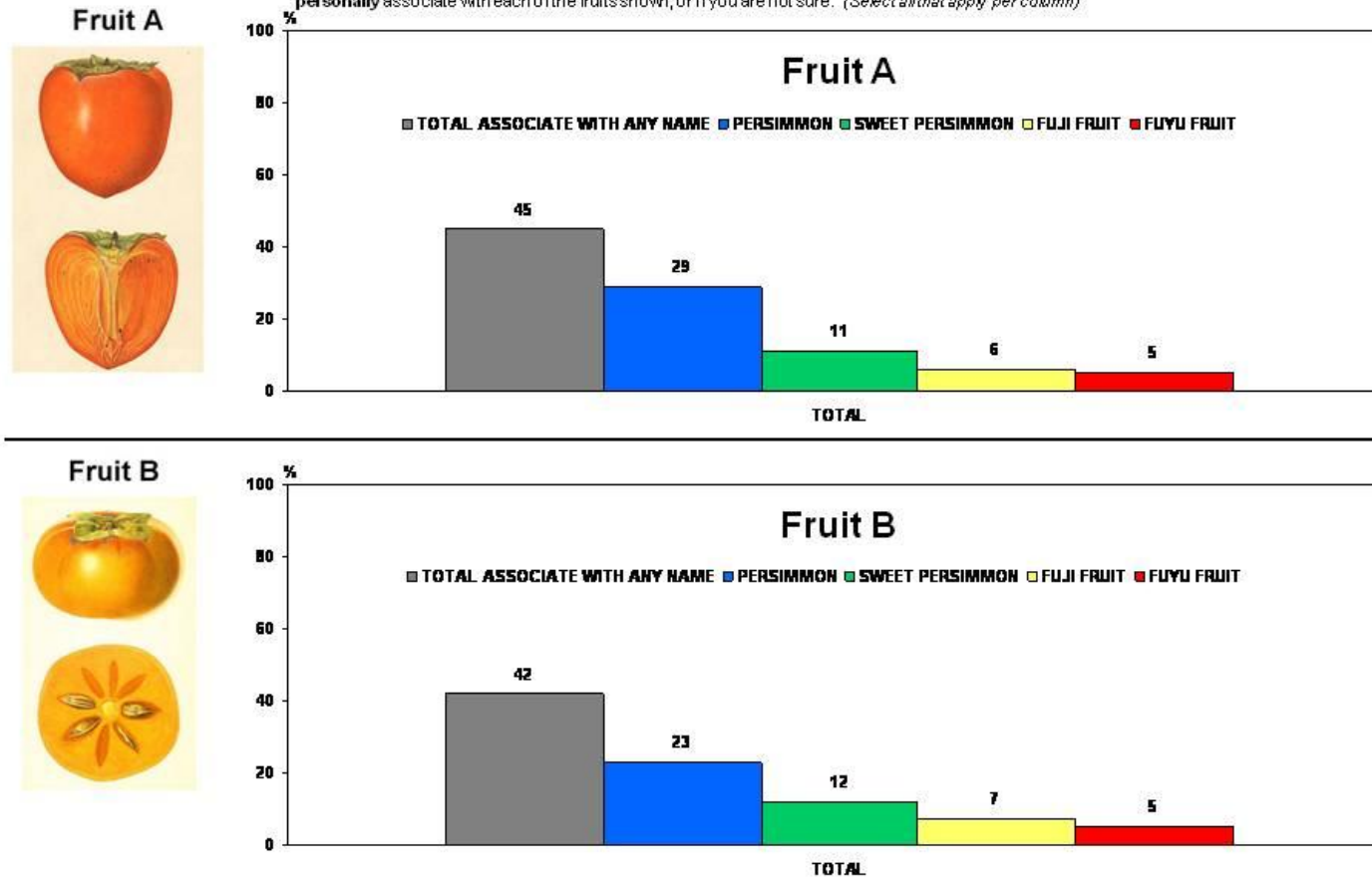


FIGURE 1a

BASE: ADULTS AGED 18-64 NATIONALLY (n=1218)

Name associate with each type of fruit – Fruit A

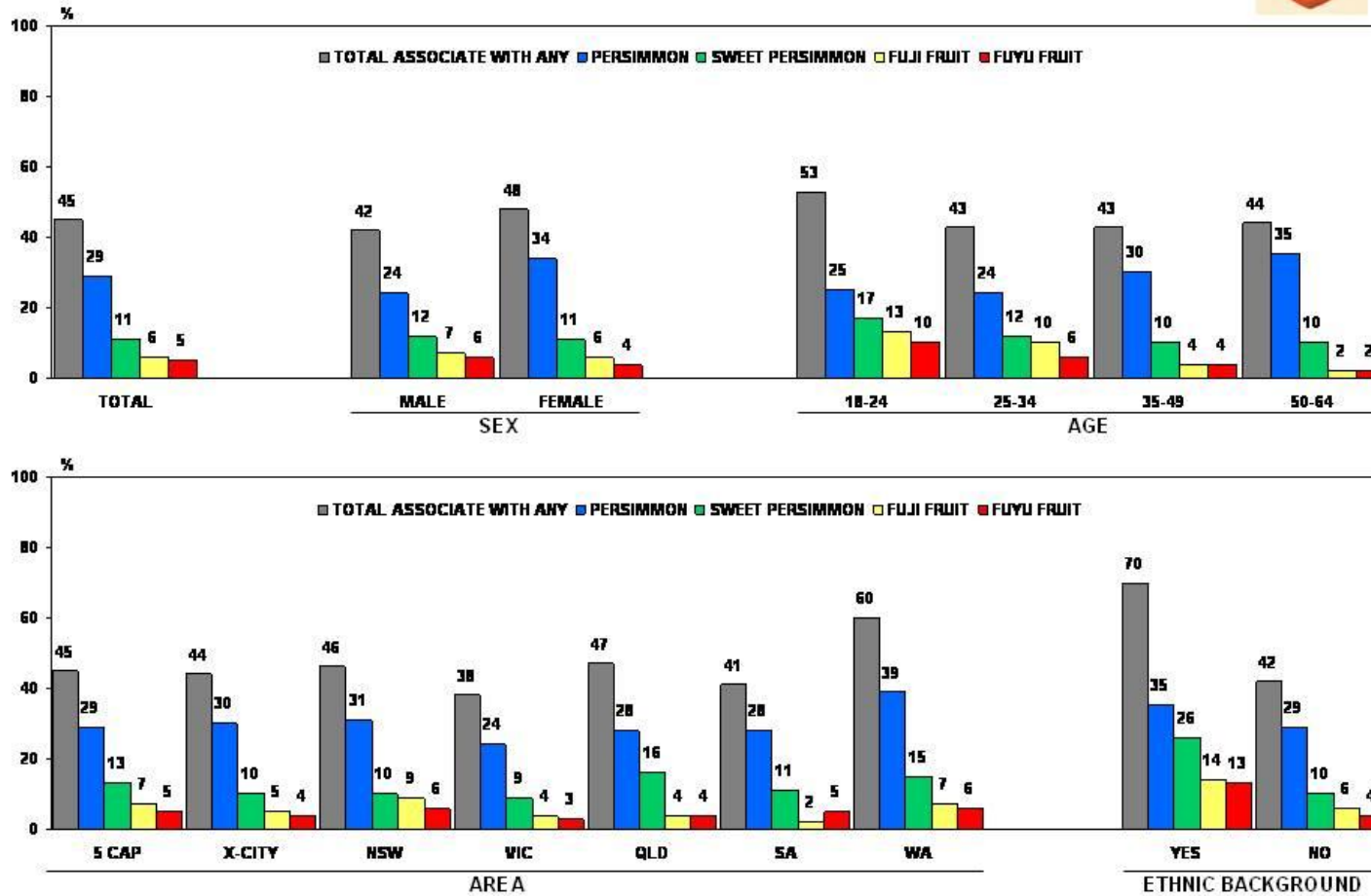
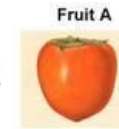


FIGURE 1b BASE: ADULTS AGED 18-64 NATIONALLY (n=1218), MALE (n=606), FEMALE (n=612), 18-24 (n=260), 25-34 (n=275), 35-49 (n=358), 50-64 (n=325), 5 CAP (n=701), X-CITY (n=517), NSW (n=351), VIC (n=300), QLD (n=205), SA (n=150), WA (n=161), YES (n=111), NO (n=1107)

Fruit B



Name associate with each type of fruit – Fruit B

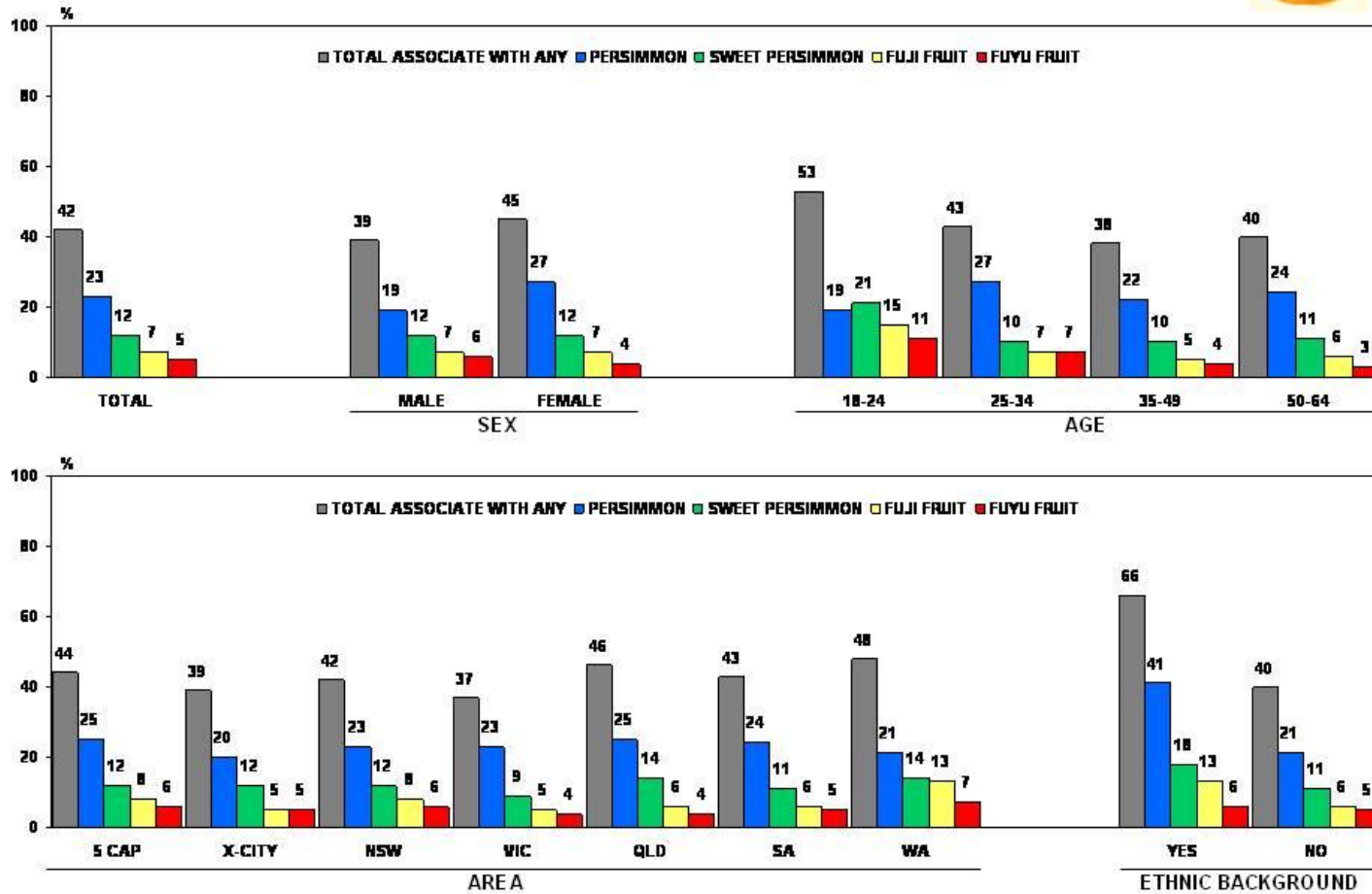
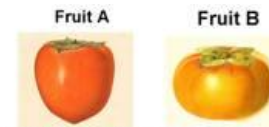


FIGURE 1c

BASE: ADULTS AGED 18-64 NATIONALLY (n=1218), MALE (n=606), FEMALE (n=612), 18-24 (n=260), 25-34 (n=275), 35-49 (n=358), 50-64 (n=325), 5 CAP (n=701), X-CITY (n=517), NSW (n=351), VIC (n=300), QLD (n=205), SA (n=150), WA (n=161), YES (n=111), NO (n=1107)

3.2 Frequency eat each fruit



- Figure 2a - In total 24% of Australians say they eat Fruit A (persimmon) during the Australian persimmon season, including 8% who eat it at least once a month. The results for Fruit B (persimmon, sweet persimmon, Fuji fruit, Fuyu fruit) are very similar – 22% saying they eat Fruit B during the Australian persimmon season, including 8% who eat it at least once a month. Perhaps the results are so similar because of people's confusion over which fruit is which. Or perhaps people think of these fruits as interchangeable with one another (like how some people use regular tomatoes when roma tomatoes are not available).

By demographics (Figure 1b-1c)

- There is no difference in consumption of Fruits A and B by sex.
- Younger people (aged 18-24, 25-34) are more likely to eat Fruits A or B (around 3-in-10), compared to older people (around 2-in-10).
- Similarly, younger people (aged 18-24, 25-34) are more likely to eat Fruits A or B at least once a month (around 13%), compared to older people (around 5%).
- People in the five capital cities (around 30%) are more likely to eat Fruit A or B, compared to people in other areas (around 15%). This is also true at the level of at least once a month (around 11% vs around 5% respectively).
- While the overall consumption of Fruit A and B does not appear to differ by state, the data suggests people in Western Australia are more likely to eat Fruit A or B at least once a month, compared to people in other states.
- Those with a "persimmon familiar ethnic background" are more likely to eat Fruit A or Fruit B (around 55%), compared to those who don't have this background (around 20%).
- Those with a "persimmon familiar ethnic background" are more likely to eat Fruit A or Fruit B (around 25%) at least once a month, compared to those who don't have this background (around 7%).

Frequency eat each fruit

Fruit A is called a persimmon, while Fruit B is called a persimmon, sweet persimmon, Fuji fruit, or Fuyu fruit.
Please indicate how often you personally eat each of these different fruits during the Australian persimmon season (February - June)?

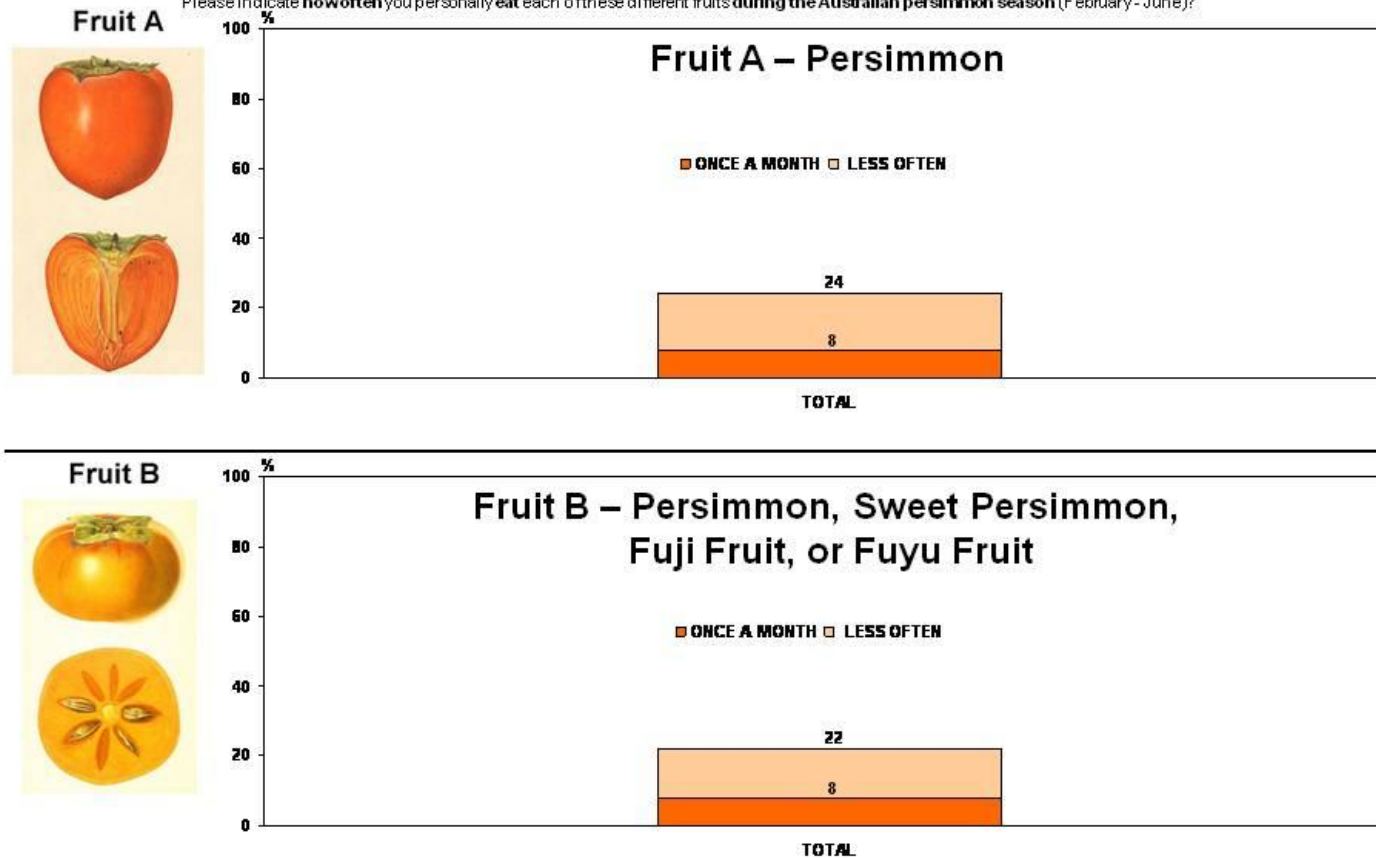


FIGURE 2a

BASE: ADULTS AGED 18-64 NATIONALLY (n=1218)

Frequency eat Fruit A called a Persimmon

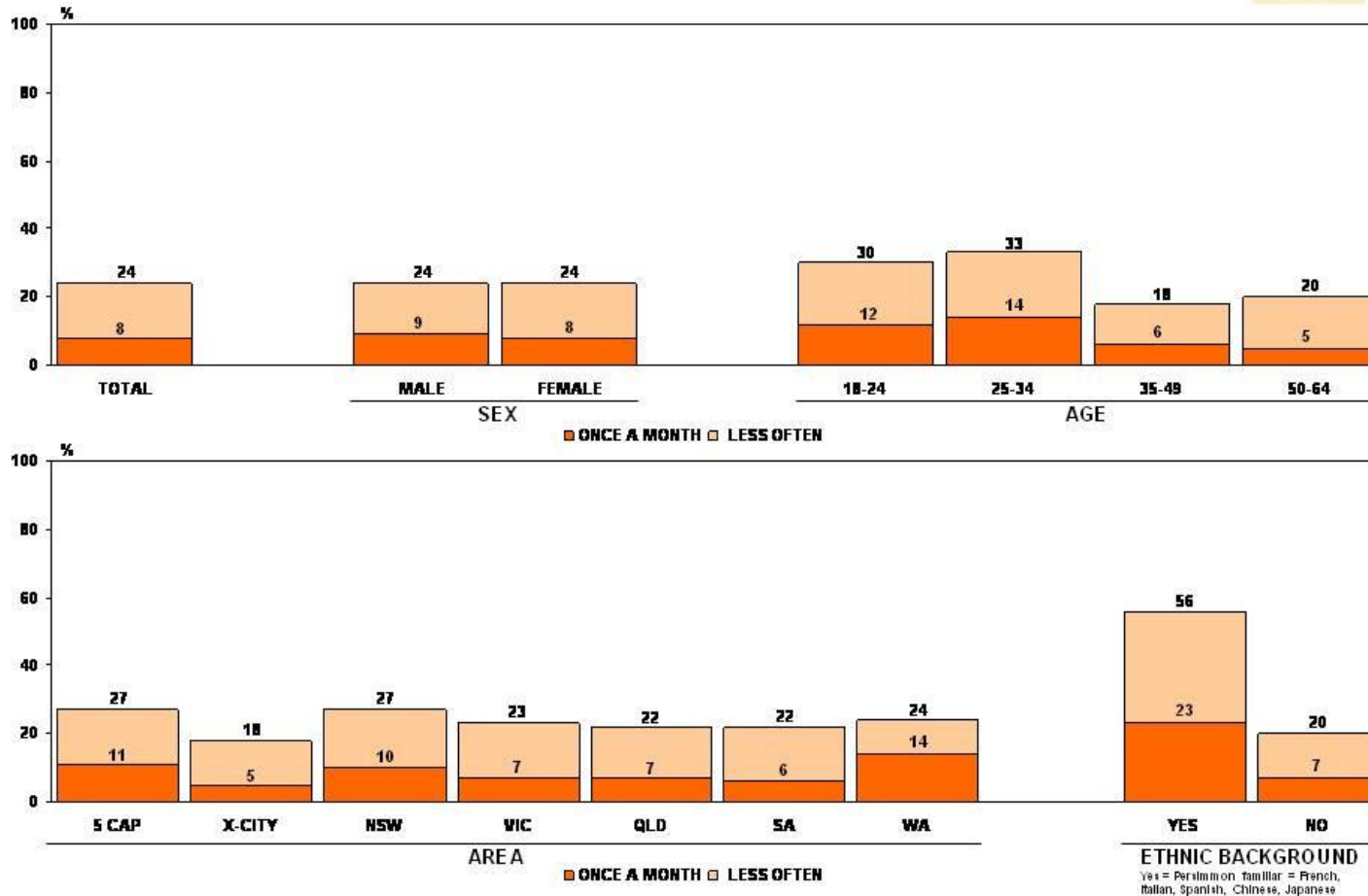


FIGURE 2b BASE: ADULTS AGED 18-64 NATIONALLY (n=1218), MALE (n=606), FEMALE (n=612), 18-24 (n=260), 25-34 (n=275), 35-49 (n=358), 50-64 (n=325), 5 CAP (n=701), X-CITY (n=517), NSW (n=351), VIC (n=300), QLD (n=205), SA (n=150), WA (n=161), YES (n=111), NO (n=1107)

Frequency eat Fruit B called a Persimmon, Sweet Persimmon, Fuji Fruit, or Fuyu Fruit

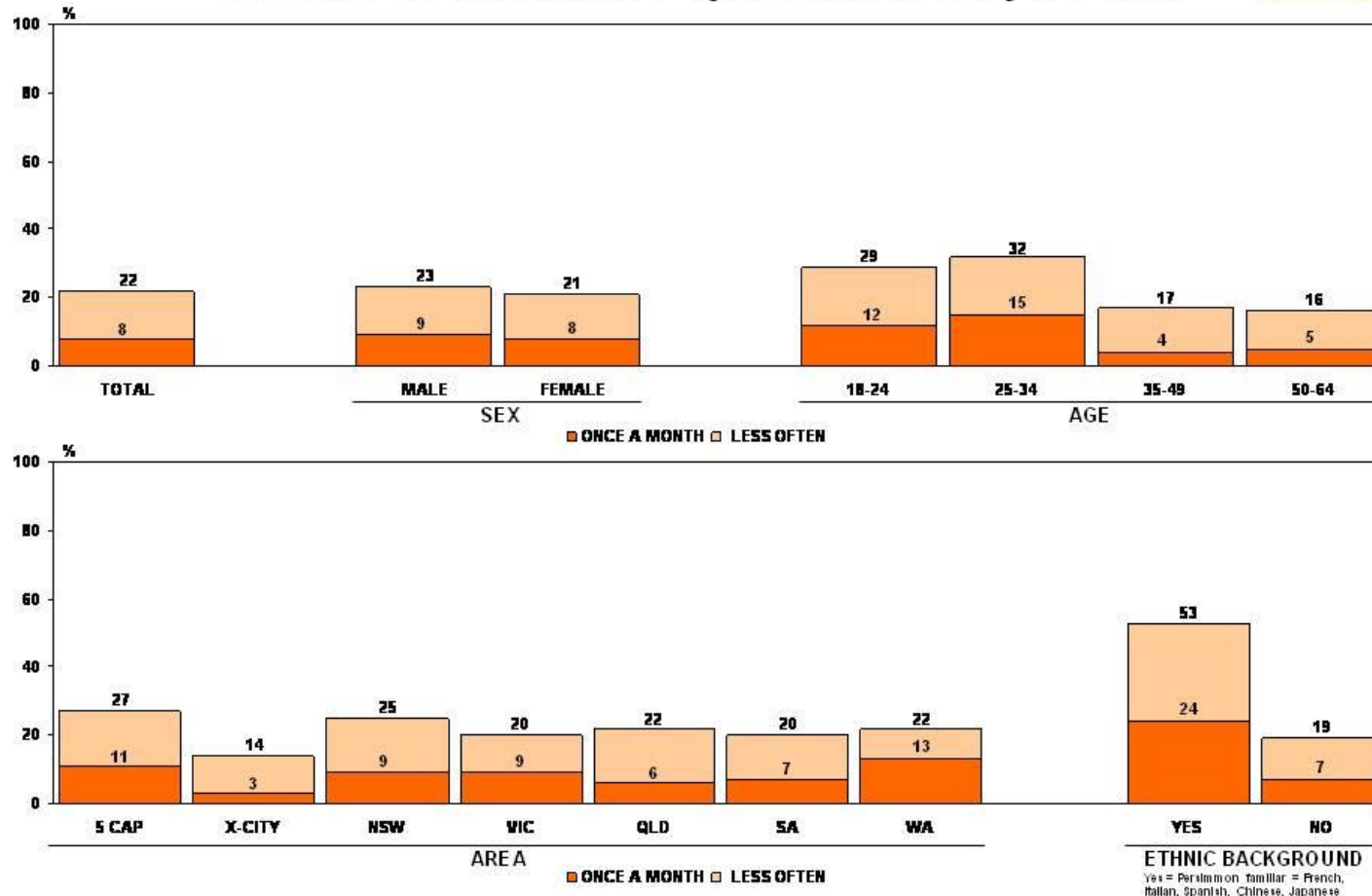


FIGURE 2b BASE: ADULTS AGED 18-64 NATIONALLY (n=1218), MALE (n=606), FEMALE (n=612), 18-24 (n=260), 25-34 (n=275), 35-49 (n=358), 50-64 (n=325), 5 CAP (n=701), X-CITY (n=517), NSW (n=351), VIC (n=300), QLD (n=205), SA (n=150), WA (n=161), YES (n=111), NO (n=1107)

NEWSPOLL TERMS AND CONDITIONS

A) Professional behaviour and Privacy

NEWSPOLL is a member of the Association of Market and Social Research Organisations and is ISO 20252 quality accredited. Newspoll adheres to the Code of Professional Behaviour of the Australian Market and Social Research Society and the Market and Social Research Privacy Principles. The Code of Professional Behaviour includes the following key requirements:

1. Confidentiality

Clients' identities will not be revealed to respondents nor to any third party without the client's consent or unless Newspoll becomes legally obliged to do so. Respondents' identities will not be revealed to clients without the respondent's consent and only in cases where the information is to be used for research purposes and the intended use has been explained to respondents.

2. Ownership of information and retention of records

Results to a research study commissioned by a client become the property of the client. Results to syndicated studies remain the property of NEWSPOLL.

All research proposals, research designs, questionnaires and processing techniques, including systems of weighting, remain the property of NEWSPOLL. All computer table reports provided by NEWSPOLL identify the variables used in the weighting process. Further details, if required, are available at an additional cost. Photocopies of individual questionnaires or a copy of the database, excluding respondents' identities, may be made available to a client at the client's expense.

Unless specified otherwise, any hard copy or electronic material provided by a client for the conduct of a project will be retained by Newspoll and stored in a secure location. Documentation and research results (both hard copy and electronic) associated with projects are kept for a minimum of two years.

3. Publication of results

Clients choosing to release the findings of a NEWSPOLL survey must ensure that the results are represented in an objective and non-misleading fashion.

NEWSPOLL advises that all questions must be objective and not intentionally misleading or attempting to elicit a desired response. NEWSPOLL must be consulted and agree in advance on the form and content of any intended release. NEWSPOLL must be provided with a copy of the proposed release and given 48 hours for its review. Up to two executive hours will be made available for this review process. Additional reviewing time, if required, will be charged at an hourly rate. NEWSPOLL is obliged to take action to correct any misleading statements about the research or its findings. **The NEWSPOLL name may be used only in cases where these conditions have been satisfied.**

B) Conditions of agreement between NEWSPOLL and clients

1. Reporting

Standard reporting comprises computer tables provided in electronic PDF format. For Omnibus studies tables include two standard demographic banners. Optional summary reports if required will be provided electronically in Microsoft Word or PowerPoint. Alternatively two hard copies may be provided for each report produced (A4 sized).

2. Conduct of fieldwork

From time to time Newspoll employs the services of associated companies to assist with fieldwork related services. Newspoll reserves the right to do so when required.

3. Costs and confirmation of costs

Costs for a study can be confirmed only after agreement on questionnaire outline or on sighting a draft client questionnaire. Changes to agreed research specifications and/or questionnaire will result in a cost revision. Unless otherwise specified, all quoted costs refer to Australian dollars and reflect current year's rates, effective for the January - December period. Costs are quoted exclusive of GST. For Australian clients, GST will be shown separately on a tax invoice and must be paid for by the client.

4. Omnibus bookings, approvals and late changes

Space on NEWSPOLL's Omnibuses is strictly limited to ensure high quality response, and early booking is recommended. Final approval of a questionnaire refers to approval, after all agreed changes, to a questionnaire developed or formatted by Newspoll and submitted to a client for review.

Questionnaires approved, or bookings made, after the following deadlines are subject to late surcharges as shown:

	Final Questionnaire Approval Deadline	Late surcharge	
Telephone Omnibus			
Fri - Sun	Tues 11:00am	After 11:00am	15% of study cost, min \$40+GST
Mon - Wed or Mon - Tues	Tues 5:00pm	After 5:00pm	15% of study cost, min \$40+GST
Online Omnibus			
Tues - Sun	Tues 4:00pm	Questionnaires must be finalised and approved by specified deadline, otherwise they cannot be included in the Online Omnibus and cancellation charges apply (see section 5 below)	

5. Cancellation charges

NEWSPOLL reserves the right to charge a fee where a confirmed booking is made and the project is subsequently cancelled. Cancellation fees are based on the amount of work completed and costs incurred. They are subject to a minimum 10 percent charge if questionnaire development has begun, up to the full cost of the project if fieldwork or analysis has commenced.

6. Postponement charges

NEWSPOLL reserves the right to charge a fee where a confirmed booking is made and the project is subsequently postponed. Fees are based on the costs incurred as a result of postponement.

7. Invoicing and payment terms

Omnibus studies are invoiced in full at the time of provision of results or for multi-round studies 50 percent will be invoiced at the commencement of the study and 50 percent on provision of results. Custom studies are invoiced 50 percent upon commissioning and 50 percent upon provision of results.

Full payment of invoices is requested within 7 days of invoice date. Newspoll reserves the right to impose a late payment surcharge of up to \$1,000 per month for invoices unpaid after 30 days. NEWSPOLL also reserves the right to delay the commencement of any study if there are overdue invoices from previous studies.

