

***Brand Aotearoa? Deep Origin Marketing  
of Functional Foods and Other Natural Products of New Zealand Origin***

**by Eliot Masters**

**DISSERTATION**

**Submitted to**

**The University of Liverpool**

**in partial fulfilment of the requirements**

**for the degree of**

**MASTER OF BUSINESS ADMINISTRATION (MARKETING)**

**2010**

**A Dissertation**

**entitled**

***Brand Aotearoa? Deep Origin Marketing  
of Functional Foods and Other Natural Products of New Zealand Origin***

**by Eliot Masters**

We hereby certify that this Dissertation submitted by Eliot Masters conforms to acceptable standards, and as such is fully adequate in scope and quality. It is therefore approved as the fulfilment of the Dissertation requirements for the degree of Master of Business Administration.

**Approved:**

**Dissertation Advisor**

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**The University of Liverpool**

**2010**

**CERTIFICATION STATEMENT**

I hereby certify that this paper constitutes my own product, that where the language of others is set forth, quotation marks so indicate, and that appropriate credit is given where I have used the language, ideas, expressions or writings of another.

**Signed**

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## **Abstract**

The purpose of this study is to provide an initial situation assessment on the state of the 'clean and green' brand as it relates to functional foods and other natural products of New Zealand origin, in answer to the question, 'What product values and attributes should be embedded in a global brand offering of functional foods and other natural products of New Zealand origin?'.

Data collected reflects the limited number of detailed voluntary responses received (n = 10) following extensive circulation (total population 220) of a simple open-ended questionnaire based around a mere five questions. The resulting case studies are assessed in terms of their relative sense of ownership of the 'clean and green' national brand, and conclusions drawn from the sum total of responses received, which were disassociated from the case studies (individual respondent enterprises) in order to respect confidentiality of respondents as per the ethical checklist prepared as part of the proposal for this dissertation.

The research indicates a well-defined continuum of values ranging from 'deniers' of any validity to the 'clean and green' place myth, to 'denialists' who deny any dent in its sheen, some of which have been seen to do what they can to stifle all discussion of the issues at stake. In between are those who acknowledge passive benefit by association with the 'clean and green' brand, and those who believe their green credentials are far beyond the norm.

At their most developed, committed 'owners' of the brand may be seen to add substantial value to the brand as a whole at the global level, as well as prospects for the long-term

sustainability of the brand, by providing particularly good examples – in product and practice (perhaps certified), and also in terms of green story-telling and generation of lush, high-value imagery which reinforces the ‘clean and green’ image of New Zealand by direct association in the mind and imagination of the global consumer.

Fortunately, there is a developing national dialogue emerging, both at governmental levels and within the private sector, which seeks to revalidate and re-legitimise the purity and long-term credibility of the ‘clean and green’ national brand – a task necessarily demanding of voluntary cohesion and collective action sustained over time by a wide diversity of stakeholders.

It is hoped that this dissertation will make a small contribution toward this important and challenging process of revalidation, renewal and revivification, and may be considered as a reference useful in the process of revalidation of the ‘clean and green’ national brand, with attention to attributes such as green thinking and transparency of origin which effectively ‘upgrade’ the ‘clean and green’ national brand for the 21<sup>st</sup> Century – call it Brand Aotearoa.

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Image: NASA [http://visibleearth.nasa.gov/view\\_set.php?categoryId=2234&p=2](http://visibleearth.nasa.gov/view_set.php?categoryId=2234&p=2)

### **introduction: out on our own**

Isolation is a strong theme of New Zealand's biological and cultural histories. Evolution through a long period of isolation created unique flora and fauna. After splitting off from other continents 80 million years ago, the New Zealand landmass became the stage for the evolution of plants and animals so distinctive that it has been described as the closest scientists will get to studying life on another planet. The long isolation and slow evolution meant these plants and animals were especially vulnerable to new changes. New Zealand was one of the last large land areas on earth to be settled by humans. The settlers, and the exotic species they brought with them, had a dramatic impact on our indigenous biodiversity.

Isolation has also benefited New Zealanders. Coupled with our low population density, it has spared us the worst effects of pollution and helped us to maintain a relatively clean, green and healthy environment. The challenge facing us now is to sustain the benefits that are provided by our natural environment, and to halt the decline of our indigenous biodiversity...

Sustaining New Zealand's biodiversity will benefit the whole community, through the clean air and water and biological productivity that come from healthy ecosystems, the pride and profit we get from New Zealand's distinctive biological and green branding, and the enjoyment and sense of identity we derive from our natural world'.

*from: A Strategy for New Zealand's Biodiversity (Government of New Zealand 2000)*

## Chapter 1

### Aims of the Dissertation

*Imagine that you live in Asia, or Britain or perhaps the US. You have driven home through the smog to your cramped apartment, and as you eat your dinner you see on TV images of snow-capped mountains reflected in crystal-clear unpolluted lakes. Cows graze in lush green pastures, native birds sing in the forests, waves thunder onto deserted beaches, and happy healthy people are having fun. It is New Zealand, and it looks like paradise.*

*So you think to yourself, I want to eat food that comes from there. I want to go there on my holiday.*

- Ministry for the Environment 2001a, *Valuing New Zealand's clean green image*

### 1.1 Introduction

As a relatively tiny and under-populated pair of islands in the remote southern Pacific, New Zealand looms large in the global popular imagination, punching well above its weight as a Place – both a location (as seen in some recent big-budget ‘blockbuster’ popular films) and as an origin of rather peculiar species – the kiwi is not just a unique and somewhat strange looking (if highly charismatic) flightless bird, and also an identifier of a person or thing native of New Zealand, but it is also a piquant and somewhat peculiar fruit, bursting with fresh green pulp, sassily sour yet satisfyingly sweet. Where else<sup>1</sup> could such a uniquely ‘special’ fruit come from, but New Zealand?

In short, the New Zealand brand represents a synthesis the indigenous and the expropriated transplants of late-colonial global culture, its isolation correlated with ‘purity’ and the complementary twin attributes (or brand values) ‘clean and green’.

After several decades of great success and advancement of the brand since its inception, in tandem with the ‘100% Pure New Zealand’ co-brand, focusing on the country as a nature-

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<sup>1</sup> In fact, from China. The kiwi’s somewhat distant origins as ‘Chinese gooseberry’ need not be mentioned here, inconvenient as they may be to modern branding.



centered destination, declining environmental performance of the country on the global scale has been matched by a developing domestic sense of increasing flimsiness of the 'clean and green' place myth, which at its most overstretched has become an increasingly worn cliché dependent upon wilful ignorance or even pretence.

*'Picture a pair of islands where the water, sky and land have never been polluted [sic] and the nearest neighbor is more than 1,000 miles away. Imagine they have rolling green hills nourished by year-round rains, moderate temperatures and abundant sunshine. Sheep outnumber humans 10-to-1, and the humans who live there are fiercely protective of this land's natural resources. What sounds like a dream is actually New Zealand, a country ready to break onto the natural products scene in a big way'. (see 'A Postcard from New Zealand,' Appendix 3).*

While some pander to an overly simplistic 'clean and green' narrative aimed at the naïve global consumer, many concerned kiwis express scepticism at such stretches of credibility, noting the common use of agricultural chemicals banned in most other parts of the world, declining water quality in rivers, lakes and offshore areas downstream from ranch and dairy operations, and increasing concern over a perceived threat of genetically modified organisms (GMO). Contrast the promotional puff-piece reproduced above (from the 'Natural Products New Zealand' website) with this rejoinder, posted in response (before its subsequent abrupt removal):

*'While it's true that New Zealand foods are tastier and safer than USA foods, the author has probably never been to New Zealand or he/she would know that virtually all our rivers are polluted, we have major land pollution problems from pesticides, herbicides, over use of fertilizers, and particularly urine and fecal matter from dairy cattle. As a result, we grow very little organic food, proportionally. Furthermore, even though we don't grow GM food, we experiment a lot with GM foods, animals and trees and over 30% of our processed food in supermarkets contains GM ingredients'*  
[Posted By: Charles Drace on June 02, 2010 ].

Meanwhile, outside observers in the global media – e.g. the Economist, the Guardian and the New Zealand Herald<sup>2</sup> (all 2010) – have recently regaled their readers with exposés

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<sup>2</sup> Cumming (2010), 'New Zealand: 100% Pure Hype'.

calling attention to the disconnect between commercial mythology and increasing domestic concerns over unsustainable agriculture, land-use and natural resource management. How long before the 'clean and green' New Zealand brand is sullied beyond redemption?

Let it be understood that the research undertaken in pursuit of this objective is intended to address topics which may be uncomfortable to consider for some, who may perhaps fear diminution of the value of their products and competitive advantage if the 'clean and green' place myth is openly and critically assessed. It is the position of this study that such an open and honest appraisal is fully required as a necessary step toward the revalidation of the brand, and is thus in the long-term interest of the brand itself, as well as its individual stakeholders – among which is included the New Zealand economy as a whole.

This thesis examines the implications of the grandly ambitious yet distinctly fragile construction which is the New Zealand 'Clean [and] Green' national brand, particularly as a country of origin.

## 1.2 Product Categories under Consideration

The scope of this study will address branding of edible natural products and functional foods of New Zealand origin, including fruit juices and blended beverages, healthy snacks, and will include seafood and other marine products, given the high environmental risk-factors affecting that value chain.

From an agronomic perspective, the (very significant) abundance of export-oriented horticultural fruit crops is characterised by an inevitable margin of sub-export product – small cosmetic blemishes or irregular shape or size make for an abundance of inexpensive fruit. In the case of the study location, horticultural production is matched by processing

infrastructure. 'Given New Zealand's strong background in agricultural and horticultural research and the recent emphasis by local funding agencies on innovative foods (Foundation for Research Science & Technology, 2003), New Zealand is ideally positioned to be at the forefront of functional food development' (Ferguson et al. 2003).

A 'clean and green' New Zealand is in a position of strength to serve discerning global consumers, and may be best positioned to serve the Japanese market in particular, not only in terms of proximity but also given an implicit recognition that the New Zealand 'brand' itself connotes nature and beauty – the 'land of the long white cloud' seen as so impossibly green and robust that it serves as a background to fairy stories writ large as Hollywood blockbusters.

On other aspects of functional foods and natural products, Henson, Masakure and Cranfield (2008) studied male respondents documenting their 'protective actions in the form of behavioural change against a health threat' according to the 'protection motivation theory (PMT)' which consists of a threat appraisal followed by a coping appraisal. The study finds that men consciously at risk of prostate cancer used lycopene dietary (tomato-based) to offset their respective risk.

The other side of this relationship between apparent virtue and its perception is a recently documented tendency for green consumers to 'compensate (or over-compensate) their perceived virtuous choices with reactive selfish behaviours (New Scientist 2010). Perhaps there is a cynical side to complacency in reinforcing stakeholder identification with brand values, particularly in such a tautly connected web as that described by Hackwell as quoted in Cumming (2010).

However, there is a tangible economic advantage in the fact that global consumers may specifically opt for a product of New Zealand origin as a means of off-setting other, more clearly harmful lifestyle choices and conditions. An urban consumer may opt for a New Zealand apple in appreciation of the 'clean and green' meme – imagining as she consumers it the distant green jewel of the island and its clean soils from which it grew.

Krystallis Maglaras and Mamalis (2008) cover (in considerable specificity of detail) the demographic diversification of demand for functional foods and other natural products, including the roles played by gender, age and level of education. This information provides a valuable framework in consumer behaviour from which functional food brands may be developed and targeted to specific consumer and market segments. Heasman (2004) provides a broad market analysis of functional foods and the changing characteristics of their marketing, but he focuses more on product than brand, and does not address COOL or any other aspects of origin labelling.

The concept of a 'clean and green' New Zealand was born in the in the early days of white settlement during the Victorian era, as described by Brendon (2008).

Some of the earliest settlers saw themselves as the inhabitants of an unsullied Elysium in starting contrast to the gritty gray streets of industrial England which they had left behind, and which seemed to obsolescence and decay even as their new world rose in glory (Brendon 2008).

From these early days, the concept of a 'clean and green' New Zealand as national brand was occasionally reinforced actively (as in the nuclear ban of 1987), but has more often been a passive consequence of the geographic isolation and intense natural beauty of the place, as seen in popular films.

However - properly termed a 'myth' by Menzies (1999) - the 'clean and green' concept had already been negated long before, during the earliest days of human settlement on the islands, as waves of anthropically- driven extinctions wiped out flora and fauna unique to the islands (King 2007).

This basic contradiction between facts and mythology continues to the present day. As noted by multiple sources, the 'clean and green' image of New Zealand wears thin in many respects – and is in some cases utterly belied - as one examines the facts on the ground. For instance, agricultural and land-use policy is inconsistent and often unsupportive of conservation measures which could truly be considered green. Agricultural chemicals long banned many other parts of the world are still in common use legally New Zealand.

### **Aims of the Dissertation**

The Dissertation itself aims to answer the following question:

**'What product values and attributes should be embedded in a global brand offering of functional foods and other natural products of New Zealand origin?'**

Country branding has been defined by the marketing group FutureBrand in a series of annual global opinion polls – Country Brand Index or CBI – which ranks countries according to their 'brand'. It should be noted that the CBI in this case addresses both the country of New Zealand somewhat vaguely as a travel destination and as an origin of products, but commonly lapses into a default definition of the brand to the tourist and travel sector - a conflation which may be problematic given that the relationship between the two factors is

more complex than may be readily apparent, and must be carefully defined through situation analyses.

Perception of New Zealand as product origin - 'Brand Aotearoa' – is seen as being green in more ways than one, with a perceptual bias of ecological integrity and supposed attention to social and environmental sustainability and conservation values, which might be termed **green thinking**. However, initial informants indicate that this 'green' image may be entirely prejudicial in nature, resulting from a 'halo effect' (affect heuristic) and not based on actual fact – this is cause for concern in a media-savvy world in which examples of Darwinian 'self-selection' for brand catastrophe (such as the recent child poisoning images of Brand Shenzhen) do not fade, but are kept alive on myriad electronic sites likely to endure over decades to come.

In order to disaggregate brand characteristics, 'Brand New Zealand' will refer to a **destination** focused travel and outdoors markets, while 'Brand Aotearoa' will refer to product **origin**, called 'Country of Origin Image' (COI) in the literature (Maheswaran 1994, among others). The term **deep origin** refers to the concept of **traceability** to a specific place of origin, at the highest resolution (farm or watershed), taking into account the specific geographic and cultural aspects of its production (*e.g. terroir*).

Drawing from a series of relevant case studies derived from semi-structured interviews, the author will define 'Deep Origin' brand positioning – which may be characterized by a complex or profound relationship between the product (or service) and its origin, or by the characteristics of the 'brand story' upon which the values of such a brand are based.

Finally, the author will describe define 'Deep Origin' brand positioning as it relates to New Zealand origin or provenance, based on the COI of 'Brand Aotearoa', using specific case

studies relevant to the study.

A second problem to be addressed concerns an apparently inherent difficulty in branding natural products as opposed to synthetic products. It has been suggested by Montague-Jones (2009) that functional foods based on fresh fruit and other local horticultural products may be more challenging to brand than synthetic soft drinks : 'Juice is one category where private label products have made great strides as brands have struggled to differentiate themselves in terms of taste. It is a lot more generic as a product type than carbonated drinks that are often tied to a specific recipe and brand history' (2009).

Juice is a functional food, and as such enjoys a hugely favourable market niche which has grown along with (and directly in spite of) what may be called the synthetic foods lifestyle. Functional foods have been identified as a means of displacing perceived risk, as illustrated by the case of lycopene by Henson et al. (2008). "Functional foods offer the solution of modifying the nutritive properties of foods that people already consume" (Ferguson and Philpott 2003).

A notable 'success story' is that of the innovative Dutch company Hoogesteger, a producer of fresh juices under private label to the Albert Heijn supermarket chain ubiquitous in the Netherlands, where it is renowned for its quality and value. In recent years – most evidently in the current profusion of Albert Heijn 'mini marts' – the central altar of the shop has become a person-height, well-lit panel of hundreds of bright (naturally-colored) clear glass bottles of pure juice, stacked several rows deep – elegant glass cylinders topped by a small bright band label including (on a flap underside) a schematic representation of the specific numbers of each fruit contained in the bottle. In brief, the shop display is nothing less than an art installation – a thing of great sensorial beauty, and content – both in terms of product

and sustainability of (recyclable glass) packaging. These notions of elegance, quality at value and sustainability of packaging may be seen in new products emerging on the New Zealand market and, one imagines, emerging from New Zealand to the global marketplace.

From an agronomic perspective, the (very significant) abundance of export-oriented horticultural fruit crops is characterised by an inevitable margin of sub-export product – small cosmetic blemishes or irregular shape or size make for an abundance of inexpensive fruit. In the case of the study location, horticultural production is matched by processing infrastructure. ‘Given New Zealand’s strong background in agricultural and horticultural research and the recent emphasis by local funding agencies on innovative foods (Foundation for Research Science & Technology, 2003), New Zealand is ideally positioned to be at the forefront of functional food development’ (Ferguson and Philpott 2003).

Geographically and economically, New Zealand is in a position of strength to serve the Japanese market in particular, not only in terms of proximity but also given an implicit recognition that the New Zealand ‘brand’ itself connotes nature and beauty – the ‘land of the long white cloud’ seen as so impossibly green and robust that it serves as a background to fairy stories writ large as Hollywood blockbusters.

*‘By taking the best natural resources from our clean, pure environment and improving them, New Zealand is recognised around the world for its world-leading produce. New Zealand is today fusing leading technologies and research to create premium specialty goods - all the while installing systems to protect the environment and sustain resources for longevity’ (New Zealand Trade and Enterprise 2010).*

The form of the dissertation is determined as a question rather than a thesis, as the definition of an effective product and brand offering is a broad and complex undertaking, drawing from multiple sources, perspectives and disciplines, which cannot be guessed at prior to intensive and focused study.



#### 1.4 Objectives of the Study

The objectives of the study, in order of their execution, are to:

1. Prepare a desk study describing a draft situation analysis on branding of functional foods and other natural products of New Zealand origin with potential for global trade, including definition of a set of product classes and specific products relevant to the study;
2. Document attributes of origin and production which would add value both to the individual brand and to the 'deep origin' (or origins) of New Zealand
3. Propose a set of recommendations regarding the above products and their attributes as they relate to branding at the level of the product itself, its producer, and its origin, feeding these back to the study respondents; and
4. Synthesize the above into a reference document for distribution to key stakeholders in order to fully address the research question, 'what product values and attributes should be embedded in a global brand offering based marketing of functional foods of New Zealand origin?'

## Chapter 2

### Literature Review

#### 2.1 Context of Existing Published Work

This chapter consists of a comprehensive review of the construction and history of the 'clean and green' New Zealand image and the present-day reality behind what has come to be considered 'a powerful cultural myth' (Menzies 1999) or even outright 'greenwash' (multiple sources including Futerra 2008), with attention to relevant recent initiatives which seek to address this discrepancy between myth and reality for the long-term credibility and sustainability of this important concept.

First, the general concept of branding, then branding by origin or place is briefly considered, including national brand identity and branding by place of origin – either of which would be sufficient scope for a dissertation in and of themselves. The subject of the 'clean and green' image of New Zealand as national brand is introduced, including the early history of the concept, followed by more recent developments in its evolution, and its specific relevance to functional foods and other natural products. Finally, recent years of seemingly increasing flimsiness of the brand are reviewed, with some potential scope for renewed confidence in the 'clean and green' national brand.

#### 2.2 The Concept of 'Brand'

The term 'brand' comes to us from the Old English, signifying the "'identifying mark made by a hot iron" (1550s) [and] broadened [by] 1827 to [refer to] "a particular make of goods"' (Harper 2010). Pike (2004) provides an historic overview of the concept of 'branding,' referring to the creation of the brand identity we recognise today, which made its first 'first

appearance in the marketing literature during the 1950s (citing Banks 1950; Gardner and Levy 1955), while the majority of studies on branding theory and practice date from the early 1990s (citing Aaker, 1991; McEnally and de Chernatony, 1999).

The concept of 'green branding' has grown out of the literature on 'green marketing' which was developed in the 1970s (Hartmann et al. 2005). Whereas green marketing focuses on aspects of environmental sustainability of specific products or services, green branding refers to the creation of a 'green' brand identity reflecting on the core values of an enterprise or other entity. According to Hartmann et al., a 'green brand identity is defined by a specific set of brand attributes and benefits related to the reduced environmental impact of the brand and its perception as being environmentally sound' (2005).

### 2.3 The Power of Place : From Genius Loci to the Ecological Unconscious

The sense of place (or spirit of place, the genius loci of the classical Romans) is a concept which comes to us from antiquity, linked both directly and by analogy to the concept of genius through inspiration by an environmental (or otherwise external) influence. The perceived values of a particular place describe its character to us based on mere perception or interpretation of available data, both experiential and secondary in nature.

Growing from a context of cultural geography, a new (mid-20<sup>th</sup>- Century) concept of psychogeography was defined by Debord (1955) as 'study of the precise laws and specific effects of the geographical environment, consciously organized or not, on the emotions and behaviour of individuals'. The 'ecological unconscious' of Roszak (1993) scales up the concept to Jungian dimensions with a posited direct relationship between the individual and the environment which transcends individual heritage and experience; a fundamental

equation of setting and collective engagement in a given landscape (or ‘foodshed’ as it has recently been called in the development literature).

This interface between the tangible and intangible - the psychological, emotional and metaphysical – underlies the complex nature of such inspiration by a numinous landscape – actually and/or perceived as sentient, or nearly so. According to some philosophical or metaphysical lines of reasoning, a given place is imbued with a ‘sense’ or sentience and a spirit, just as a human is imbued with a mind, a ‘heart’ and a soul – the relationships between these aspects are complex, and mutually related.

#### 2.4 Branding Place: A Context

Place branding as a concept has been attributed to Simon Anholt, a specialist also credited with the concepts of ‘nation branding’ and ‘city branding’ – taking over from previous concepts of ‘place marketing’ addressed by Philip Kotler (*e.g.* Kotler and Gertner 2002), Seppo Rainisto (*e.g.* 2003), and others.

Branding place is predicated on the understanding that some places are inherently more ‘valuable’ – or rather, may be said to add more value - than others, as reflecting unique (though possibly intangible) attributes of product value. In other words, origin holds a unique position in any roster of brand values – a position both irreplaceable (and in some cases unique and effectively incomparable) and fragile to maintain, open as it is to compromise - or even to near total annihilation - with sufficient negative media attention. One particularly painful recent example is that provided by China, which has distinguished itself in recent years as an origin of toxic products regularly blamed in poisonings both in that country and globally.

### *Branding Country of Origin*

Branding Country of Origin (COO) is another field of inquiry with adequate content to fill out numerous theoretical dissertations, as surveyed by Al-Sulati and Baker (1998). According to Assarut, COO images may further be differentiated into General Product Country Images (GPCs) and Specific Product Country Images (SPCIs), of which the former was found to be 'constructed from' the latter (2006).

Fletcher looks further into 'country of origin' branding, which he considers 'refers to the ways in which a buyer perceives doing business with an overseas market in terms of its attractiveness as a source of supply' as distinct from consideration of 'psychic distance,' which he defines as the 'ways in which a seller perceives the overseas market in terms of its [own] attractiveness as a place with which to do business' – noting that 'both are perceptual constructs' (2005).

Country of origin (COO) studies recognise a bifurcation between what is called the 'halo effect' – defined roughly as the associative values ascribed to a given origin based on patchy and indirect information (in other words largely on uninformed 'prejudice,') and the summary construct model, which 'proposes that consumers infer information about product attributes based on coded abstract sets of information that are stored and readily recalled from long-term memory' (Han 1989, as cited in Knight et al. 2005).

### *Branding Place as Origin*

The more mainstream commercial attributes of origin are most extensively documented in the denomination of (mainly European) *terroir* or certification of *appellation d'origine contrôlée* (AOC) as administered by the French national *Institut National des Appellations d'Origine* (INAO), which focus on micro-geographic distinctions of soil and its geomorphology, water and aspect of a particular source, most notably for higher-value products such as wines, olive oils and cheeses, in which the coincidence of geographic factors results in a regionally specific product of unique provenance and specific value. INAO certification under the AOC system is based on product and/or process certification according to set certification criteria. In the case of a national origin, the integrity of the brand is the aggregate result of thousands of decisions along hundreds of localised domains, products and industries, well beyond the agro-industrial – and, perhaps most important, the **perceptions** of global consumers based on a finite set of clues or cultural triggers collected over years of experience, perceptions and impressions (whether fully justified in fact or not). In her study on *terroir*, Barham (2003) 'considers the current importance of labels of origin for agro-food products as part of a biopolitics of food that relinks the local and global through an emphasis on place... a label of origin connects it with a specific place, and opens the possibility that producers, as well as consumers, can be held accountable for their actions in that place'. However, critics of the AOC system note that it is fully reliant on the physiochemical elements of origin (or *terroir*) rather than the quality of a given product, or the care taken in its production (Jancou 2010) – a criticism based on a certain hollowness of concept, as it were, which foreshadows comparable issues discussed below.

Noting that the concept of Country of Origin Labeling (CoOL) dates back to 1965, Josiassen (2009) provides a helpful overview of the evolution of this and related concept, but only up to '1980s onwards' – which includes (we surmise) studies as recent as Laroche, Papadopoulos, Heslop and Murali (2005). Along the way, Josiassen pauses to make special mention of the 'first literature review' by Bilkey and Nes (1982), and singles out Min Han (1989) on 'the interaction between products and origin images' (Josiassen 2009). Carter, Krissoff and Zwane (2007) consider country of origin labelling (CoOL) in the US, and discuss voluntary versus mandatory designation of geographic origin; Though this chapters consider the relative benefits of certified origin to certain brands, the article is more focused on product marketing rather than branding *per se*. A similar discussion in the context of New Zealand is undertaken by Insch (2007), with reference to the political context of CoOL (voluntary *versus* compulsory) as addressed by the Green Party of Aotearoa New Zealand (2009).

One of the foremost theorists of nation branding, Keith Dinnie of temple University (Japan Campus) offers a theoretical construct situating nation branding in a more or less universal context – without, however, addressing the singularly relevant case of New Zealand at all – this in the context of examining branding of 28 specific places. Dinnie rightly and relevantly recommends that aspiring nation-brands 'prevent nation-brand degenerating into a superficial amalgam of outdated clichés' – and rightly asks, concerning 'Nation-brand values: Who has the right to decide upon these?' (2002). It appears, however, that Dinnie's observations and theoretical constructs may not be entirely relevant to the case of New Zealand, particularly in his preoccupation with a balance between rural and urban imagery and brand values, e.g. reconciliation between the 'old-fashioned rural imagery used by

tourist boards with the reality of a sophisticated modern nation’ – whereas the ‘clean and green’ image of New Zealand, discussed in further detail below, lies distinctly (albeit not exclusively) toward the idyllic and bucolic countryside as purity of origin, and origin of purity (Dinnie 2002).

## 2.5 A ‘Clean and Green’ Brand Aotearoa ?

Branding New Zealand may be considered through two apparently complementary, yet possibly conflicting brand identities, i.e. ‘100% Pure’ (circa 1999) and ‘clean and green’ – which, according to Coyle and Fairweather (2007) dates back to the sinking by French intelligence agents of the Greenpeace protest ship *Rainbow Warrior* at the Port of Auckland in 1985 - an event which may itself be seen as an early foreshadowing of the ‘clean and green’ concept, as it may have led, in part, to the banning of nuclear weapons from New Zealand soil – a ‘clean and green’ act if ever there was one (Government of New Zealand 1987).

Drawing from a range of theoretical perspectives yet more conceptual than that provided by Dinnie (2004), Menzies posits that the ‘clean and green’ brand value may be considered as ‘a powerful cultural myth – meaning that it embodies a powerful cultural truth’ (1999), following ‘social constructions of nature’ similar to those explored by Adams and McShane (1992). A respondent commenting on the recent Economist (2010) article puts it best, that ‘our "100% pure" or "clean green" image was always a myth, the sort of myth that most countries make up about themselves’.



This dissertation will address aspects of origin and place as a basis for branding of functional foods and other natural products of New Zealand origin. As such, this chapter first consider the literature relevant to branding based on deeper aspects of product origin and place.

In order to disaggregate brand characteristics, 'Brand New Zealand' will refer to a **destination** focused travel and outdoors markets (typified by the '100% Pure' brand, which implies yet does not ultimately sanction 'clean and green',<sup>3</sup> while 'Brand Aotearoa'<sup>3</sup> will refer to product **origin**, called 'Country of Origin Image' (COI) in the literature (Maheswaran 1994, among others), which is based squarely on 'clean and green' yet accentuated and informed by '100% pure' as an (albeit mythical) characterisation of place as origin.

As recently noted by various sources including Everitt (2010), recent years have seen some distance between these two pillars of the New Zealand brand, as the department of has Tourism countered domestic criticism of the flimsiness or even hypocrisy of the 'clean and green' brand by defensively denying that '100% pure' branding of the New Zealand landscape in general has anything to do with 'cleanliness' or 'greenness' of the environment *per se*.

Recent appraisals and valuations of these disparate yet seemingly (or potentially and logically) complementary brand concepts or identities demonstrates a distinct, if hopefully bridgeable, discrepancy between brand perception versus reality – in favour of 'the experience' rather than 'the environment,' according to the Ministry of Tourism (Cumming 2010), and therefore holds itself to the subjective and interpretive (fertile ground for the 'halo' effect) *versus* the objectively verifiable (*i.e.* more related to summary construct).

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<sup>3</sup> from the commonly understood Māori word for New Zealand, popularly translated as 'Land of the Long White Cloud'- though various sources point out that it was originally used in reference to North Island, and that its use as a synonym for the country of New Zealand is a comparatively recent convention.

## 2.6 Product and Origin Branding

Beyond COO, product-country images recognise the elements of COO which relate to specific products or product classes; Knight et al. Work around a dichotomy of product values defined by basic classifications of 'hedonic' and 'utilitarian,' in which foods (certainly including functional foods) and other natural products would be emphatically considered 'hedonic' (2005).

Roth and Romeo (1992) found that consumer willingness to purchase a product from a given country is increased when the image of the country of origin is specifically linked to the relevant product category, indicating that the relevance of COO depends upon consonance between product an origin, with reference to 'what underlies consumers' attitudes towards products from a particular country' (Roth & Romeo, 1992, p.493, quoted in Knight et al. 2005). Building on this, in their precisely relevant study, Knight et al. assess whether 'halo' associated with the "clean and green' brand' image 'will enhance perceptions of New Zealand products and lead to increased demand and premium prices in key markets' (2005).

In respect to the product categories addressed by this study, *i.e.* functional foods and other natural products, Knight et al. consider how the 'clean and green' halo 'may influence ratings of specific tangible attributes of products,' providing the hypothetical example of consumer 'perceptions that New Zealand is "clean and green' ", and/or that The Lord of the Rings movies filmed in New Zealand portray a beautiful landscape, leading to the "inferential belief" (Verlegh & van Ittersum, 2001) that New Zealand apples will taste better and have lower agricultural spray residues than competitors' (2005).

On branding and marketing aspects of functional foods and natural products as a general product category, Henson, Masakure and Cranfield (2008) study male respondents documenting their 'protective actions in the form of behavioural change against a health threat' according to the 'protection motivation theory (PMT)' which consists of a threat appraisal followed by a coping appraisal. The study finds that men consciously at risk of prostate cancer used lycopene dietary (tomato-based) to off-set their respective risk.

The other side of this relationship between apparent virtue and its perception is a recently documented tendency for green consumers to 'compensate (or over-compensate) their perceived virtuous choices with reactive selfish behaviours (New Scientist 2010). Perhaps there is a cynical side to complacency in reinforcing stakeholder identification with brand values, particularly in such a tautly connected web as that described by Hackwell as quoted in in Cumming (2010).

Krystallis Maglaras and Mamalis (2008) cover (in considerable specificity of detail) the demographic diversification of demand for functional foods and other natural products, including the roles played by gender, age and level of education. This information provides a valuable framework in consumer behaviour from which functional food brands may be developed and targeted to specific consumer and market segments. Heasman (2004) provides a broad market analysis of functional foods and the changing characteristics of their marketing, but he focuses more on product than brand, and does not address COOL or any other aspects of origin labelling.

## 2.7 'Clean and Green' – What Does It Mean?

While the phrase may date from the mid-1980s (Knight et al. 2005), the concept of a 'clean and green' New Zealand had its deeper origins in the in the early days of white settlement during the Victorian era, as described by Brendon (2008). Some of the earliest settlers saw themselves as the inhabitants of an unsullied Elysium in starting contrast to the gritty gray streets of industrial England which they had left behind, and which seemed to obsolescence and decay even as their new world rose in glory (*ibid*).

From these early days, the concept of a 'clean and green' New Zealand as national brand was occasionally reinforced actively (as in the nuclear ban of 1987), but has more often been a passive consequence of the geographic isolation and intense natural beauty of the place, as seen in popular films.

However - properly termed a 'myth' by Menzies (1999) - the 'clean and green' concept had already been negated long before, during the earliest days of human settlement on the islands, as waves of anthropically- driven extinctions wiped out flora and fauna unique to the islands (King 2007).

This basic contradiction between facts and mythology continues to the present day. As noted by multiple sources, the 'clean and green' image of New Zealand wears thin in many respects – and is in some cases utterly belied - as one examines the facts on the ground. For instance, agricultural and land-use policy is inconsistent and often unsupportive of conservation measures which could truly be considered green, and agricultural chemicals long banned many other parts of the world in still use legally New Zealand (Cumming 2010).

In her thesis on graphic representation of food origins, Birt (2006) examines the embodiment of 'green values' in brand identification and marketing, noting trends of rapidly increasing global demand for natural products including functional foods. The Albert Heijn juice line is singled out for appreciation of the brand values of purity and transparency which the juice line embodies (2006); further discussion of the attributes of the brand (disaggregated by producer, retailer and consumer) are provided by Verplaetse, van Egmond and Daggelders (2005) – though it should be noted that this document was found on the Internet as 'grey literature' and was not intended for publication, nor public access – revealing as it does a private labelling relationship of great value to the current study. Finally, Orth and de Marchi (2007) describe (in great – one might even say excessive - detail) the derivation and meaning of brand values or 'brand beliefs' as a ratio or equation describing the relationship 'between functional, symbolic, and experiential benefits'. What can be ascertained with relative certainty is a decline in the 'green-ness' or 'purity' of New Zealand's environmental sustainability standards, as the country slips down through the ranks to 15th place in the global order of precedence (Emerson 2010). It may be observed that while the global consumer still considers New Zealand to be a high-quality origin, many New Zealanders have come to see such an image as increasingly hollow – a sentiment borne out by this decline in the national position in respect to recent environmental indices (*ibid*). In fact, several respondents (and more casual informants) readily use the term 'greenwash' to describe both the 'clean and green' and '100% Pure New Zealand' campaigns, while the New Zealand Business Council for Sustainable Development website presents a reference guide to the subject for ease of reference, and presumably constructive action in its mitigation (Futerra 2008).

Coyle and Fairweather examine the 'place image, place myth' of a 'clean and green' New Zealand in great and informative detail, through the use of focus group discussions. Drawing from previous studies (*i.e.* Gendall et al. 2003), the authors note that 'just under half' [of respondents surveyed in one such study considered the notion a myth, and proceed to question the 'sustainability of this 'clean and green' place myth' (2005), With its evocations of an earthly Arcadia as the 'lifeworld that kiwis call home' , the 'emotional salve of "clean green" countryside that is strongly embedded into [*sic*] the national consciousness' (Bell 1996, quoted in Coyle and Fairweather 2005).

In fact, consistent with the opinions expressed by several respondents are the comments submitted online in response to the recent article in the Economist (2010): 'The criticisms to our environmental record surfaced years ago, immediately in response to the slogan. Actually I think our environmental record is conscientious but unspectacular; what you might expect from a sparsely populated little place on the far end of the world. It's good that we're at least *self critical and open*' [*italics added*].

It is worth noting that such a bluff and candid approach to national self-evaluation might truly be said to reflect an element of the national character, not given to self-delusion nor empty self-aggrandisement. For this reason, there may be scope for ultimate resolution of the 'bifurcation point' identified by Coyle and Fairweather (2005) between kind fictions and harsher realities, in order to consolidate what reality may still remain behind the 'clean and green' myth - without recourse to the total re-branding or conscious and total abandonment of the 'clean and green' national image, as seemingly recommended by a clearly unsympathetic Economist (2010).

As observed by Fleming, quoted by Coyle and Fairweather (2005), there is clearly a ‘need to resolve the conflict [or ‘gap’ between myth and reality, if only] to protect economic interests inherent in the brand’ (2002).

*‘The size of the contribution the [New Zealand] environmental image is making to some of our major and emerging export industries, coupled with the degradation in environmental quality in some key areas, suggests that New Zealand runs some risk of losing the value created by its current environmental image... **In the long term, one can expect environmental image and environmental quality to track one another. Acceptance of this position would imply a risk averse approach to environmental management**’ (Ministry for the Environment 2001a, emphasis added).*

According to Knight et al., ‘perceptions of product-country image related more to specific issues of confidence and trust in integrity of production, certification and regulatory systems than to country image stereotypes’ (2005). Clearly, the economic value of the ‘clean and green’ brand as product origin rests squarely upon tangible, objectively verifiable (and to some extent quantifiable) values and attributes, rather than a warm fuzzy feeling generated by perception and open to subjective or emotional bias.

### ...and what is it worth?

For over a decade, New Zealand has branded itself ‘Clean [and] Green’ – as a destination and as a source of dairy, fruit and other agricultural products, apparently with huge commercial success, with a 50% increase in visitors during this time, to an annual value of NZ\$21 billion – and expansion of global markets for organic produce, fruit in particular (Cumming 2010, and Ministry of the Environment 2001). However, all respondents report a common awareness that in actuality there are significant caveats to the structural integrity of the ‘clean and green’ national brand, including inconsistencies in farm policy such as the use of pesticides and herbicides banned in many developed countries.

In the theoretical background to the case study on 'clean and green' relevance to the dairy industry, Menzies introduces the concept of reflexivity, which she defines (drawing from Garfinkel 1967, as quoted in Kuper and Kuper 1996) as 'the interdependence between surface appearance and the associated underlying reality' (1999) – which might be paraphrased in colloquial terms as 'walking the talk'.

It seems clear that fundamental and possibly growing contradiction may underlie (and may eventually seriously compromise) the Clean Green image like a semi-dormant tectonic fault of eventual import, sooner or later. According to the Ministry for the Environment report *Valuing New Zealand's Clean Green Image*. (2001), 'export sectors recognise the need to promote New Zealand's image as a producer of food in a natural environment' – a country 'heavily dependent on its export industries, including agriculture as 'the single largest earner, regularly contributing over \$20 billion to the Gross National Product' - while noting prevalent use of 'traditional agricultural techniques that put stresses on the environment and cause pollutants to enter the food chain'... to the extent that some critics imply the Clean Green New Zealand image to be 'just... a marketing ploy' (Ministry for the Environment 2001).

In fact, for many kiwis, mention of the 'clean and green' or '100% pure' image is sufficient to elicit an immediate knee-jerk reaction indicative of a fallacy and hype – which, to put it mildly, are quite antithetical indeed to the national character.

As observed nearly a decade ago by the Ministry for Environment:

*'There are environmental problems that are sufficient to raise questions about the sustainability of the value of New Zealand's exports attributable to its environmental image...There is a risk that New Zealand will lose value that is created by the current environmental image if we are not vigilant in dealing with the problems that could threaten the image' (2001).*

*'if New Zealand were to lose its clean green image, it would have an enormous effect on the New Zealand economy. For one thing, we could lose an edge in many of the prime markets where*



*consumers are careful about what they eat. And, although the surveys covered only dairy products and organic foods, a lot of other products that New Zealand exports in fact get eaten, so the effects of a tarnished environmental image could extend to all of these sectors. Taking these sectors into account, our clean green image is likely to be worth hundreds of millions, and possibly billions of dollars per year'. (Ministry for the Environment 2001).*

According to Aholt (2009):

*'The idea of "brand equity" sums up the idea that if a place, product or service acquires a positive, powerful and solid reputation, this becomes an asset of enormous value – probably more valuable, in fact, than all its tangible assets, because it represents the ability of the place or organization to continue to trade at a healthy margin for as long as its brand image stays intact. Brand equity also represents the 'permission' given by a loyal consumer base for the company or country to continue producing and developing its product range, innovating, communicating and selling to them' (Aholt 2009).*

Fortunately, there are indications that some thinkers and practitioners are bringing new standards of conduct and self-scrutiny to monitoring the New Zealand brand. One good example is the Green Brand New Zealand weblog (or 'blog'), which defines itself as a 'strategy to boost New Zealand's earnings through global leadership in environmentally friendly consumer consciousness':

*'Clearly, 'clean and green' is only a passive strategy in New Zealand. It has just grown organically as some businesses and sectors independently have discovered its value to them... So why do we tolerate this confused and disorganised state of affairs for our single most valuable asset for national development – our brand? We have the opportunity to take on Green Brand New Zealand as a conscious and proactive strategy for national development. We can make 'clean and green' much bigger through a coordinated, synergetic approach... Interestingly, the Green Brand New Zealand strategy doesn't require money. It's about better coordination of existing efforts between multiple organisations and sectors around a single-minded purpose. It also requires some bold policy and PR platforms such as going GM Free, and perhaps setting more aggressive net emissions reductions targets. The money already exists. The strategy is about making better use of existing resources... Success is about passion and commitment to reaching the goal... (Everitt 2010).*

Further, Everitt quotes Rob Fenwick (former Chairman of the New Zealand Business Council for Sustainable Development, a leader in re-validating the 'clean and green' national brand): 'This clean, green thing has been a useful tool to help us understand how the world thinks of us. But it's a very passive expression. There's no call to action in just being 'clean and

green''. Proactivity and a timely call to collective action lie at the heart of the Green Brand New Zealand initiative, focused on the 'debate about the legitimacy of New Zealand's 'clean and green' image, and if legitimate, how to make the most of it' (2010).

## 2.8 Standards of 'Clean and Green' Reality – and Its Sustainability

If we accept the inherent risk and responsibilities inherent in a '100% Pure,' 'Clean [and] Green' national brand – and the responsibility of its stakeholders to strive to a set of minimum standards in this regard, in defence of brand equity and integrity, then to what extent is this feasible under current regulatory regimes? To what extent should enforcement be considered?

In light of the limited feasibility of legal sanction or the significant costs imposed by certification systems, voluntary adherence to any proposed set of 'Clean Green' operating procedures and criteria would seem preferable to a formally mandated or proprietary certification system.

## 2.9 Conclusion

By all accounts, New Zealand has (either cleverly, 'passively' or more likely by some combination of the two) gained an almost ludicrously effective national brand reputation as a 'green land' distant and (not coincidentally) untrammelled by more pedestrian forces of urban sprawl and the environmental impacts of historically haphazard industrialisation, from which other 'New World' locations (*e.g.* the New England states of the US) have only recently and by degree come to emerge, according to such indicators as tree cover and water quality.

However, due in part to somewhat antiquated regulatory frameworks regarding land use (e.g. the environmental impacts of dairy operations, and downstream effects on freshwater resources, estuarine and marine fisheries) and agricultural chemicals in particular, a discrepancy has grown in recent years between the great success of the 'clean and green' national brand and known realities on the ground, leading to increasing cynicism (at least internally) as regards the legitimacy – and possibly the future credibility and relevance – of the brand. This gap between 'brand hype' and basis in fact is rather neatly (if sadly) exemplified by the rise in global rank to 4th position based on the perceived value of the '100% Pure' national brand (FutureBrand 2009), while at the same the global rank of the country has distinctly fallen (to 15th place) in terms of actual environmental performance (Emerson et al. 2010).

Drawing on questions of brand equity addressed above, we should also consider the recent work of Hartmann et al. on 'functional versus emotional positioning strategies' in green branding, combining 'functional attributes with emotional benefits' (2005). Hartmann et al. define positioning strategies as either 'functional or emotional,' in which emotive positioning is better placed to imply hedonic reward from consumption of 'green' products, while functional positioning appeals more to virtuous aspects of ecological sustainability (2005). Given the choice of what may seem in retrospect to be a false dichotomy, it should not be surprising that the authors conclude that the most effective approach includes both emotive and rational, hedonic and virtuous positioning.

## **Chapter 3.**

### **Methodology**

The methodology developed for the study is largely qualitative, encompassing a set of 10 case studies drawn from semi-structured interviews and action research - with triangulation of findings by analysis of quantitative data where appropriate and available.

#### 3.1 Participants and Sites

Respondents were identified by self-selection from among initial contacts identified during two visits to the project area (Auckland, Wellington, Nelson and Golden Bay areas) were undertaken in January and March 2010, during which key stakeholders of the 'clean and green' brand New Zealand ('clean and green' brand New Zealand ) were identified, introductions made, and initial (semi-structured) interviews conducted. In four specific cases, respondents expressed varying degrees of concern over ethical concerns including the legitimacy of the research from the point of view of its academic sanction, two of whom apparently expected a formal written communication from the University of Liverpool; none of the three was apparently satisfied enough by the conditions of distance learning and all opted out of the research. A fourth respondent had concerns over confidentiality given the specifics of their business, which were addressed by an extensive telephone interview in lieu of the semi-structured interview format. Though the specifics of that interview have been omitted from the dissertation, the facts as communicated did inform the case study of that respondent, as well as the discussion and conclusions.

### 3.2 Role of the Researcher

The researcher adopted a role of clinical interviewer, with an aspect of participant-observer in that the researcher first visited the study area some 25 years previously, and spent the subsequent quarter-century as a practitioner and producer of natural products in Africa, including product development, branding and marketing according to principles of green branding and product sustainability (economic, social and environmental).

While a question of bias might arguably arise, the relevant professional experience of the researcher in the field of international development – and extensive representation at natural products trade shows around the world – has instilled a strong sense of objectivity and a preference for clarity, transparency and verification according to formally defined criteria, benchmarks and indicators. It is likely that this background has afforded a higher degree of scrutiny and objective appraisal than might have otherwise been the case, thus reinforcing the objectivity and validity of the research.

### 3.3 Research Sources (Data Gathering Techniques)

Research methods were suited to the ‘long distance’ nature of the research, as the researcher was not based in the country of study.

In addition to initial interviews undertaken with stakeholders known to the researcher, and those identified in the course of two successive research visits, other sources of information were incorporated into the study, including online sources which could not be included in the literature review, but which afforded valuable insight into the current discourse and

actors implicated in the 'clean and green' national brand and its recent and ongoing re-appraisal.

Following extensive research and recommendations, a list of approximately 220 relevant stakeholders was assembled, to which was sent (along with the initial contacts mentioned above) a simple 5 question open-ended format questionnaire (see Appendix 2).

Subsequent correspondence was carried out, along with a confidential telephone interview to one respondent, resulting in a total of 10 case studies drawn from survey responses and subsequent communications.

### 3.4 Data Analysis

Interview formats were completed by 10 relevant and appropriate respondents. The results of each interview informed a 'case study' of each respondent enterprise, and were then aggregated by each of the five survey questions in order to obtain a generalised range of responses to each question which would respect concerns over confidentiality, yet allow for a rounded and balanced assessment of the sum total of responses.

A SWOT analysis was then undertaken to amalgamate some common aspects of respondent data into a clear summary and useful overview.

Based upon this combination of respondent-specific and generalised analyses, a coherent qualitative assessment of stakeholder ownership of, and investment in, the 'clean and green' national brand of New Zealand was obtained, specific branding values and attributes were defined, and key issues for discussion and follow-up were identified.

### 3.5 Validity and Reliability

The findings of the study are qualitative, and are thus open to individual interpretation to a far greater extent than a more quantitative assessment – particularly given the limited sample size of ‘self-selecting’ voluntary respondents. However, results were internally consistent with few exceptions, and they are considered to provide a valid insight into the perspectives of a representative range of stakeholders with varying degrees of ownership of, and investment in, the ‘clean and green’ national brand of New Zealand.

At minimum, the results should provide a useful basis for further discussion and, it is hoped, concerted voluntary action in support of a priceless global brand and its future – with considerable (quantifiable) import for the national economy of New Zealand, and its beneficiaries and other stakeholders.

**Table 1: Data Sources**

**3.2.1 Semi-Structured Interviews**

Initial (semi-structured) Interviews were conducted during January and March 2010, with :

1. Terry Knight, owner and proprietor, Schnapp Dragon distillery and Wild Foods (at Takaka)
2. Eleanor Bauarschi, owner and proprietor, Waiheke Blue (at Waiheke)
3. Karen and Mark Farley, owners and proprietors, Karen Farley Skincare (at Auckland)
4. Laurie Witham, General Manager, New Zealand Trade Centre (NZTC), Auckland
5. Gigi Crawford, Deputy General Manager, Zealong Tea– (at Natural Marketplace / Tea Expo 2010, Las Vegas USA)

**3.2.2 Seminar, 16 March 2010**

1. Plant & Food Research 6th Annual Seafood Workshop
1. Bob Fleming, Commercial Seafood Processing – Adelaide

**3.2.3 Correspondence**

7 correspondents, 3 of whom had declined to participate in the survey for various reasons.

**3.2.4 Electronic surveys**

220 survey formats circulated to selected potential respondents by direct email, following extensive research in New Zealand and online; 10 useful responses form the basis for the following detailed case studies (green enterprise profiles).

**3.2.5 Green Enterprise Profiles [Structured Formats]**

Aroha Drinks Ltd, Christchurch (Canterbury Plains)  
Aroha Organic Goat Cheese, Te Aroha  
Biopaints, Nelson  
Carina, Rotorua Lakes  
Goodbye Sandfly, Karamea ( West Coast, South Island)  
Living Nature, Kerikeri  
Naturally by Tricia, Auckland  
Pacific Resources, USA (Importer)  
Karen Farley Cosmetics, Auckland  
Zealong Tea, Hamilton



## **Chapter 4. Results**

### **4.0 Data and Synthesis**

The data collected reflects the limited number of detailed voluntary responses received (n = 10) following extensive circulation (total population 220) of a simple open-ended questionnaire based around a mere five questions. The enterprises profiled as case studies are first assessed individually in terms of their relative sense of ownership of the 'clean and green' national brand (Section 4.1, Respondent Case Studies (Brand Assessments), then considered together in order to synthesise commonalities in their diversity of approaches to 'clean and green' branding (Section 4.2, Respondent Descriptors Summary) .

Conclusions are then drawn from the sum total of responses received (Section 4.3, Data Synthesis), which were disassociated from the case studies (individual respondent enterprises) in order to respect confidentiality of respondents as per the ethical checklist prepared as part of the preliminary research proposal for this dissertation, and as per subsequent assurances to respondents.

It is important to note that while a range of responses were received and a diversity of identities noted, the case studies summarised below are intended to be considered as a whole and not on an individual basis, in order to synthesise commonalities into generalisations on 'clean and green' brand positioning of New Zealand enterprises.

#### 4.1 Respondent Case Studies (Brand Assessments)

This section includes qualitative assessments of the 10 respondents used as case studies in terms of their brand values in relation to the 'clean and green' national brand.

##### ***Aroha Drinks, Christchurch***

The company has strong green credentials and positioning: *'I am currently re planting wet lands on the Canterbury plains in Native[ plant]s. It is in the best interests of my business to promote New Zealand as best I can to the world as 100% pure at trade shows and devising marketing campaigns in export markets'*. Branded as rustic and rural, versus 'clean and green,' Aroha Drinks nonetheless articulates locally-specific green values, trading as they do on specific area of origin, from wilding elderberry in the river-valleys of Canterbury.

Interestingly, this case study shows that even companies and products which might be seen as consummately 'clean and green' may not be effective – nor even fully comfortable – in exploiting the value of association with the national brand to their product line. However, like several respondents, Aroha Drinks is not yet exporting, though they have clear plans to begin export in the near future, and anticipate explicit use of the brand identity – having already appropriated the paraphrased '100% Pure New Zealand Goodness'.

##### ***Aroha Goat Cheese, Te Aroha***

As a 'a very small' company which serves the local market, Aroha Goat Cheese does not have occasion to exploit the 'clean and green' national brand. However, it may be argued that the company represents the substance behind the myth, though its products never

reach beyond the local. Green positioning and local marketing make the company an example of a truly 'clean and green' brand uncompromised by the exigencies of export trade.

***BioPaints Ltd., Nelson***

BioPaints is very strong on content. Presenting values of honesty and transparency, the company is eminently poised to draw full advantage from the 'clean and green' brand of NZ origin. Due to the exclusivity and innovation of its product range (one of only a handful of natural paint manufacturers around the world), there is strong potential – even a likelihood – of the company 'feeding back' to positively reinforce the green credentials of a brand Aotearoa.

***Goodbye Sandfly, Karamea***

Strong local identification to the West Coast of South Island, specifically including the native sandfly, not overly concerned with external markets, but playing an analogous role at the national level as a remote and 'unspoiled' landscape in the New Zealand context. Strong personal articulation of green issues, a non-boastful 'green integrity' inclusive, very little brand definition is attempted. There is a sense that the company is artisanal and locally focused, with sufficient local market and little promotional outreach.

### ***Living Nature, Kerikeri***

Well-defined in its provision of objectively verifiable indicators, *i.e.* a detailed list of substances of which the product line is pointedly free, which may be seen as, and used as a reference in support of, clearly defined criteria and objectively verifiable indicators of adherence to 'clean and green' values for skin care and cosmetic products. Promotional materials are elegant and clean, with lush colour plant images on a crisp field, supported by a simple sans-serif font. Content is sound and well-stated, without resort to subjective claims. Emphasis on indigenous plants seems unique and well-presented. Brand embodies simplicity and purity, with clear connotations of product quality. Recommended as a 'best practice' practitioner in its tastefully understated, content-rich green branding.

### **Naturally by Tricia, Auckland**

A personally-identified enterprise, Naturally by Tricia projects simplicity, an earthy and floral line drawing from locally-produced plants and herbs. The product line, sold in the Auckland artisanal batch production aimed primarily at the national market. The company represents an artisanal model of natural skin care products sold locally or nationally, which may nonetheless contribute to the 'clean and green' national brand through its articulation of values. Any future exports should make identification of New Zealand origin (loud and) clear.

### **Pacific Resources, USA (Importer)**

Based in California, the company sells New Zealand origin foodstuffs, including honey and sea-salt, under a banner of (implied) purity and 'clean' values. The owner sees the example of certified organic sea-salt is seen as emblematic of New Zealand purity – where else on earth, he asks, can sea-salt be certified organic (and therefore 'pure')? company trades on the 'clean and green' national brand of New Zealand, and by the nature of its positioning, probably 'feeds back' on some level in promotion of the nation and its brand as origin.

### **Karen Farley Skin Care, Auckland**

The company caters to a specific customer base drawn from the readership of several national-circulation women's magazines. Using clean monochrome boxed packaging, holding simple and 'clean' formulations based on 'natural' (as opposed to synthetic) ingredients, lightly and tastefully scented. The company is not yet represented abroad, but is preparing to initiate export to Australia in the near future, at which point it expects to draw significantly from the 'clean and green' global brand.

Simplicity and clean are two predominant attributes, though the 'New Zealand-ness' of this cleanliness is implied rather than made explicit, though the respondent acknowledges that in her experience, global consumers *assume* that skin care products of New Zealand origin must *prima facie* be 'natural'. The company should work on fleshing out and making more explicit its New Zealand origin as it enters global markets.

## **Zealong Tea, Hamilton**

The company represents supreme purity, and a product introduced from the finest varieties of oolong tea, sited on a former New Zealand dairy operation transformed by some alchemy of landscape and intensive perennial crop management into an evergreen landscape.

Investment in packaging and presentation is extreme, at with content (tea) comprising roughly 50% by weight and 25% by volume of the package, but this seems a straightforward investment given packaging standards in lead consumer nations, such as Japan, who are easily satisfied as to the ‘purity’ of a New Zealand origin tea as compared to a standard Chinese origin.

Brand Assessment: Exclusivity drives a very high price according to international standards, but the company is adept at presenting their product through the use of lush and tasteful promotional materials, doubtless at very great cost of investment. Zealong has made themselves a ‘clean and green’ brand leader, or brand ‘owner’. The potential for Zealong ‘feeding back’ and positively impacting the global profile of the ‘clean and green’ brand New Zealand and its overall credibility.

### 4.2 Respondent Descriptors (Summary)

The following tables represent a compilation and representative (if superficial) synthesis of verbal signifiers of ‘clean and green’ branding attributes, where noted, as put forward in narrative form by the enterprises studied in their promotional and marketing materials.

Together with the visual cues which are examined further in Appendix 5, these verbal signifiers represent ‘clean and green’ brand positioning by the enterprises studied – with some noted gaps as indicated in the tables below.

**Table 2. Case Study Products and Brand Values**

Product(s)	Brand Values (brand proposition)	Description
Beverages	100% Pure New Zealand Goodness Rustic and Rural (Domestic Market)	Elderflower is handpicked wild from riverbeds, valleys and fields surrounding the mighty Southern Alps. These are then combined with artesian spring water from deep within the heart of the Canterbury plains.
Natural Food (Goat Cheese)	We are living it - commitment to principles	[none given]
Natural Paints (eco paints ; organic paints)	Environmentally friendly, non-toxic	We use chalk, china clay, plant oils and tree resins that are healthier for you, your family and your painter
Skin-Care Ingredients algae-based biofuels	I do not believe we are clean and green, other than perhaps the green eutrophication of water due to dairy effluent.	[none given]
Natural Insect Repellent	education and availability of real, functional, beautiful products	[none given]
Skin Care Products	100% Natural, Uniquely New Zealand	100% Natural Preservatives, Fragrance and Ingredients
Skin Care Products	[none stated]	healing balms are gentle and naturally effective
High-Value Export Foodstuffs	[none stated]	[none given]
Cosmetics	[none stated]	[none given]
Organic Leaf Tea	premium oolong tea with a purity you can taste and trust the Worlds Purest Oolong Tea Grown in New Zealand	finest tea plants, [planted] in the pure clean, fertile environment

**Table 3. Case Study Summary: Green Branding Attributes of Respondents**

	<b>Nouns (attributes)</b>	<b>Adjective(s)</b>	<b>Compound</b>
1	health, lifestyle, and naturalness	[none noted]	[none noted]
2	small, honest, simple	[none noted]	[none noted]
3	natural, non-toxic plant-based paints and finishes	[none noted]	natural, non-toxic plant-based paints and finishes
4	eutrophication of water due to dairy effluent	[none noted]	[none noted]
5	garden'	simple and honest	respecting the entire process of creating and using a product
6	isolation and purity	natural, clean, green, chemical-free	our brand stands totally for natural, clean, green, chemical-free 100% natural, uniquely New Zealand
			It is the potent properties of New Zealand's precious native ingredients that make Living Nature products so effective
7	[none noted]	[none noted]	[none noted]
8	From New Zealand	[none noted]	[none noted]
9	Cosmetics	vital	[none noted]
10	Single Source Purity Quality Air, Water, Sunshine and Soil	Pristine NZ Finest	Processed and Packaged from a Single Source in Pristine New Zealand
			There are No Compromises in Producing the Worlds Purest Tea



### 4.3 Data Synthesis

The following section comprises synthesis of all responses to each of the five survey questions, with inclusion of particularly notable responses of relevance to the discussion, conclusions and recommendations.

#### **4.3.1 Question 1: How has your product offering and/or company brand benefited from the ‘clean and green’ image of Aotearoa New Zealand – which some would call a ‘stereotype’ or, more unkindly, even a ‘myth’?**

SUMMARY: All respondents recognised the ‘clean and green’ national brand, and a majority of respondents (6/10) recognised benefit through perceptions of purity conferred by association with the national brand. Attributes of the national brand were described as ‘health, lifestyle, and naturalness,’ ‘clean / green/ unpolluted,’ and ‘natural, organic’.

##### Respondent 9:

*‘when we go overseas, when people show interest in our product, it is obvious from what they say that **they take for granted that the product is particularly pure and natural because it is made in NZ***’ [emphasis added].

##### Respondent 10:

*‘We find there's a general perception around the tea world (at least in Germany, USA and China, where we've been actively marketing to date) that NZ IS ‘clean and green’ . **This perception adds credibility to our brand proposition***’ [emphasis added].

#### **4.3.2 Question 2: To what extent are you and/or your company concerned with presenting a ‘clean and green’ image to the global marketplace?**

SUMMARY: Concern was high among nearly all respondents, though several respondents were hesitant to use - or respect the casual popular use of – overtly ‘clean and green’

(‘clean and green’ ) New Zealand branding out of concern to distinguish themselves from

‘free riders’ on the ‘clean and green’ NZ brand. Less constructive categories of brand stakeholders include the complacent and the despairing.

Respondent 6:

*‘It’s absolutely critical to us. We are competing in a multi-billion dollar industry worldwide, and our target consumers are extremely eco-conscious’.*

Respondent 7:

*‘My brand is quietly marketed as ‘clean and green’.*

Respondent 8:

*‘Clean is the only thing that separates NZ from the rest of the world and we push that at all costs’.*

Respondent 9:

*‘A clean green image is vital to our product’.*

Respondent 10:

*‘It is a central element of [our] identity’.*

**4.3.3 Question 3: Please provide examples (with as much detail as possible) of how your company or its product offering has distinguished itself through ‘green branding’ and/or attention to sustainability criteria.**

**SUMMARY:** This question was apparently not clear or compelling to respondents, and only two clear and detailed responses were received of the 10 respondents surveyed in the case studies.

Respondent 6:

*‘Our company brochure which lays this out pretty clearly- our 3 platforms are 100% natural, world-class science, and sustainability. Sustainability is a ‘checklist’ throughout our complete supply chain, and relevant in all our partnering and purchase decisions. In our competitive space, you literally aren’t even a contender if you haven’t got the basic ‘green’ credentials ticked off – and then it becomes far more about the depth of those credentials. Our customers want to ensure that we’re not just paying ‘lip service’ to sustainability’.*

*'Our industry is so competitive, and 'natural' is the fastest growing sector of personal care – every company worldwide is jumping on the bandwagon and in most cases blatantly 'greenwashing' their products to fool the consumer. At the top end where we're competing, to even be listed in a retail group like Whole Foods in the USA, we have to provide certifications of every single claim we make about our brand, products, ingredients, claims etc.'*

Respondent 9:

*'It is vital to our company that we source only the purest natural ingredients, and ensure that all ingredients are sustainably harvested, e.g. it is vital that for example if any ingredients are derived from palm oil that the palm oil is sustainably grown and does not endanger species such as the orangutan. Our customers are also concerned about minimising the amount of chemicals that they subject their body to, and this is vital to our formulations'.*

**4.3.4 Question 4: how do you feel your company can contribute to a re-validation and renewal of the 'clean and green' national brand of Aotearoa New Zealand, against recent media and other trends which have denounced this pervasive brand image as an increasingly hollow 'myth'?**

**SUMMARY:** While there is some diversity of input submitted by respondents, a very clear idea of the importance of serving as exemplars of best practices even if completely unconnected by horizontal integration with like-minded enterprises. Respondents underlined the importance of consumer awareness as a means of building demand, and political advocacy as a means of national-level support to green businesses.

Respondent 2:

*'Just by living it and shining our light - this will eventually sort the hypocrites from the "Real Greenies" we believe.(hope) The so called "green image" NZ is portraying is only dollar related and eventually true green and organic orientated potential businesses will catch on to the fact that portraying it and living it are not always the same things.*

- *offering an experience and not just a product,*
- *respecting the entire process of creating and using a product, and*
- *thanking the people who buy [our product] as they allow us to keep doing what we're doing.*

*It is simple and honest. Maybe that will contribute to a sense of NZ as a genuine provider of ethical product[s]’.*

Respondent 6:

- *‘Reinforcing that companies like [ours] are competing on the world stage creating some of the best 100% natural products globally.*
- *Reminding lawmakers, politicians and regulators how vital the image and the ‘green brand’ of New Zealand is for differentiating our products worldwide.*
- *We are so remote, have such high costs of getting finished goods out globally, and have high labour costs, companies like Living Nature that continue to manufacture in New Zealand need the points of difference reinforced.*
- ***Maybe we actually need an agreed and consistent view of just what “‘clean and green’ ” actually means** [emphasis added] – for some people it’s just that we have a pretty landscape, for others it’s nuclear free, but to many it’s much more – it’s about the chemicals we have in our environment, the regulation of pollutions, sustainability practices etc’*

Respondent 7:

*‘In one way It is a bit of a myth, but there are also so many smaller business's and ordinary people who are making a commitment in their own lives to be ‘clean and green’. Maybe promoting peoples stories or small businesses like mine’*

Respondent 9:

*‘In all honesty I do think and know that the image is to a certain extent a myth as the local councils spray extensively, there are toxins used here that are banned overseas. The best we can do is advocate and support groups advocating changes to how NZ authorities, businesses and individuals approach in particular conservation, horticulture and agriculture here to a more organically oriented country, thus instating a truly clean green image that should be completely attainable’.*

Respondent 10:

*‘Our brand is all about honesty and transparency, and we aim to set the world's highest purity and safety standards. All of our activities have received ISO22000 HACCP certification through Swiss company SGS. This is unique in the world of tea. We don't use chemical sprays or fertilisers ('normal' practices in the rest of the world). One quarter of the estate is already organic certified through Biogro, and we hope to certify the remainder by 2013. Our message to the world is simple: we grow and produce the world's purest tea in NZ’.*

*'There's another angle to this: [our] [location] estate used to be an ex-dairy farm. Now, as a tea plantation, it produces no nitrate run-off or greenhouse gases - key elements in achieving sustainable land use'.*

#### **4.3.5 Question 5: What other forms of external (e.g. policy) support or other intervention do you feel will be necessary to facilitate this process, at the national and global levels?**

SUMMARY: Respondents are uniformly sceptical as regards the motivations and priorities of the current national government, of which expectations of support to the 'clean and green' brand New Zealand are exceedingly modest to outright pessimistic. Clearly more responsibility is internalised and offered as a commitment of the individual business rather than any ministerial intervention.

##### Respondent 1:

*'I believe it is up to New Zealand governance to focus the direction of brand New Zealand and offer support for initiatives that help to propel our national image in a cohesive manner in accordance with the strategy they set out. I believe that strategy should primarily focus high visibility trigger issues. 1080, GE are two I have mentioned.*

*'The better this image is projected in terms of legislation, diplomacy and policy the more we can [theoretically] charge. A fairly standard marketing concept. This is why I do not agree with New Zealand being so early on the band wagon to adopt GE. Also why I do not support 1080 use, and why I think it is essential dairy farmers ensure they do not pollute water ways. Not because I'm a single minded zealot, which I am not, but because it makes sense in terms of the product positioning of brand New Zealand'.*

##### Respondent 2:

*'A government that would truly support and understand true green organic principles and would open their minds and eyes to see that NZ has really all the potential to be the first true green country in the whole world if acted upon'.*

##### Respondent 5:

*'At this point I do not think that as a group we have the consciousness required to be able to facilitate a process of really becoming what we say we are (or would like to be). This will have to be faced person by person and then business by business. Our government wants to allow GE in this country, and my perception is that it wants to*

*regulate "natural products" to their detriment and the benefit of the pharmaceutical industry. It is not ready yet to advocate for a true process of recovering what we are losing a bit more of each day'.*

Respondent 6:

*'Actually evaluate the true value of the 'green brand Aotearoa' to New Zealand exporters – no one will change policy or improve regulation until we can truly prove the monetary value'.*

*'In our industry, we want to actively lobby for improved certification, labeling laws and regulation, so you can't claim 'NZ made' or 'NZ ingredients' or 'natural' or 'organic' unless certain criteria are met'.*

Respondent 7:

*'I am sorry but I have given up being a political person. When the GMO thing was happening here a friend of mine and myself hit the streets and malls for weeks and got so many signatures to keep it in the lab. For every 10 people that walked past us , nine wanted GMO kept in the lab. The Govt of the day knew that and passed the legislation anyway. I suppose I just keep on battling on by example and also being an information sharer. When anyone emails me for advice or help or information, I will always respond. There are unlimited ways that government/s could develop this concept of NZ and make it a reality. However as far as I can see that is not their kaupapa, or agenda'.*

Respondent 8:

*'Trade NZ and the companies need to work closely together to expand this image relying on info from the agents that represent their products in the US and other countries. NZ Has a unique position in that it is a western culture [sic] with standards that can produce high quality products that no other nation can produce'.*

## Chapter 5.

### Analysis

#### 5.1 SWOT Analysis

From the above responses, it is possible to construct a SWOT matrix of Strengths, Weaknesses, Opportunities and Threats to the 'clean and green' branding of natural products of New Zealand origin. The SWOT matrix is a standard assessment and management tool for projects and other forms of concerted intervention, feeding into a logical framework model of planned action, monitoring and evaluation of specific activities and impacts.

**Table 4. SWOT Analysis**

##### **5.1.1 Strengths**

1. Uniquely coherent and consistent and priceless brand ('clean and green' brand New Zealand ) with high profile and high-penetration, high-uptake, high credibility and global recognition
2. Relative validity of brand values embodied in the 'clean and green' brand New Zealand .

##### **5.1.2 Weaknesses**

1. Brand drift to over-reach and 'greenwash' – risks blowback to brand integrity.
2. Internal contradictions 'on the ground' – unsustainable and anti-green practices (e.g. aerial spraying of 1080, eutrophication and pollution of downstream water by dairy effluent; risks of government favour of genetically modified organisms [GMO])
3. Inconsistent policy support / commitment

##### **5.1.3 Opportunities**

1. High domestic awareness of green branding inconsistencies
2. Low tolerance for 'BS' in the kiwi national character
3. Awareness of implicit risks of dissonance between brand perception *versus* reality
4. Pre-emptive self-assessment by stakeholders is well advanced
5. Niche or Bifurcated Branding: Local and National *versus* Global [

##### **5.1.4 Threats**

1. Short Term: Global scandal involving high-profile contamination of a New Zealand origin product compromises integrity of the 'clean and green' brand New Zealand (e.g. examples from China)
2. Long Term: The main existential threat facing the 'clean and green' brand New Zealand is **stakeholder complacency**, which may derive from denial that there is any threat facing integrity of the brand ( 1a Denial > Complacency) or despair at the environmental issues facing the brand, with the sentiment that its decline or unmasking is not only merited, but inevitable (1b Despair > Complacency).

## 5.2 Discussion

The 'clean and green' brand is nearly globally ubiquitous, recognised as a non-negligible source of prestige for products of NZ origin. However, there is recognition and concern at increasing compromise of the conditions necessary for sustainable use of the 'clean and green' brand New Zealand, due in part to a perception of insufficient policy commitment. The case studies compiled from structured interviews provide a range of responses to the question of whether and how the 'clean and green' NZ brand may be sustained and revalidated by a new generation of globally engaged producers and marketers of natural products of Aotearoa New Zealand origin, with some measure of complementarity to the country as place or destination.

### *Green Branding: Practices and Pitfalls*

According to the New Zealand Commerce Commission *Guidelines for Green Marketing*, 'branding products as 'green' is 'very vague, and conveys little information to the consumer other than the message that your product is in some way less damaging to the environment than others. This term invites consumers to give a wide range of meanings to the claim, which risks misleading them' (2008).

The problem of 'Greenwash' and its dilution of brand values by association with cheap statements without merit or justification has been noted in the literature review, Chapter 2. Companies which express in specific and tangible terms their objectively verifiable indicators of sustainability – economic, social and environmental – of a product line will be



better positioned to assert and defend their 'clean and green' credentials, and thus add tangible value to the national brand as a whole.

Companies which indulge in mythological blowing of smoke not only cheapen the discourse of green branding, but result in an inflation of credibility which may tarnish an industry by association. This problem has become particularly acute with the advent of internet marketing, a rather murky field where 'all cats are grey' and it is difficult to assess social and environmental claims of sustainability. Under such conditions, there is a clear premium for demonstrable and documented integrity of green credentials and 'best practices' of sustainability.

#### *What Standards of Sustainability?*

If we accept the inherent risk and responsibilities inherent in a '100% Pure,' 'Clean [and] Green' national brand — and the responsibility of its stakeholders to strive to a set of minimum standards in this regard, in defence of brand equity and integrity, then to what extent is this feasible under current regulatory regimes? To what extent should enforcement be considered?

In light of the limited feasibility of legal sanction or the significant costs imposed by certification systems, voluntary adherence to any proposed set of 'Clean Green' operating procedures and criteria would seem preferable to a formally mandated or proprietary certification system.

In effect, it may be necessary to re-invent or re-visit the concept of 'clean and green' as it relates to specific products and product classes of New Zealand origin. It is an assumption of this chapter borne out in available literature that New Zealand origin connotes superior

value to many if not most other origins, based in part on popular global acceptance of the New Zealand '100% Pure' and 'Clean [and] Green' brand identifications.

#### 4.3 Research Findings

The research indicates a well-defined continuum of values ranging from 'deniers' of any validity to the 'clean and green' place myth, to 'denialists' who deny any merit in its sheen, some of which have been seen to do what they can to stifle all discussion of the issues at stake. In between are those who acknowledge passive benefit by association with the 'clean and green' brand, and those who believe their green credentials are far beyond the norm.

At their most developed, committed 'owners' of the brand may be seen to add substantial value to the brand as a whole at the global level, as well as prospects for the long-term sustainability of the brand, by providing particularly good examples – in product and practice (perhaps certified), and also in terms of green story-telling and generation of lush, high-value imagery which reinforces the 'clean and green' image of New Zealand by association.

As explored by the recent work on green brand positioning by Hartmann et al., it has been proposed that a combination of 'emotional' and 'functional' content provides the most effective approach to green brand positioning, allowing for a balanced brand identity incorporating both virtuous and hedonic values implicit in the green product or brand, as exemplified by the dual attributes of nature itself in modern societies (2005).

‘In societies in which nature experiences are becoming scarce while life becomes increasingly “virtual” – which we guess is where almost all our readers live – the consumption of green products may serve as a substitute for real contact with nature’ (Hartmann et al. 2006). From the case studies, it appears that as imagery conveys emotion more effectively than words, while verbal content conveys information on function more readily than most images, a balance of visual and verbal content may effectively communicate green brand positioning of New Zealand natural products.

On the global marketplace, however, brand perceptions may be perverse in light of actual practices – the image may overpower the written word to the detriment of truth. In selecting New Zealand milk in an Asian supermarket, the consumer may conceivably be supporting some of the most significantly detrimental and ‘anti-green’ environmental practices, such as the pollution of the Rotorua lakes with algal bloom from dairy runoff, and other downstream effects (such as run-off of herbicides) at the watershed and landscape levels, and as far affecting the health of coastal fisheries.

Further consideration of this issue begs the question of whether and to what extent specific companies or industries which are ‘free riders’ on the ‘clean and green’ brand New Zealand (‘clean and green’ brand New Zealand ) may or should be sanctioned for the antithetical impacts of poor practice which ultimately degrade the integrity of the greater (collective) brand. This tension was noted in the articulated refusal to participate in the survey by respondents who make some of the more egregious and obfuscatory smoke-blowings (see: ‘A postcard from New Zealand’ and its online rejoinder). Some clearly see a conflict of interest in the honest appraisal of the brand which is a necessary precursor of support to the credibility - and long-term survival - of the brand itself.

Taken together with supplementary data from correspondence and from informal interviews and other sources (*e.g.* the Plant & Food Research Seafood symposium), four main patterns of reaction may be noted:

1. Positive Complacency ('denial'): Some stakeholders continue to spew out shallow and often downright fallacious 'mythology' which continues to paint a stereotypical picture of an Arcadian New Zealand, remote and unspoiled, which increased long-running risks to the credibility of the brand in the eyes of New Zealanders as well as a global *cognoscenti*. While a 'lite' version of this complacent approach was expressed by an otherwise proactive brand-leader (Respondent 10), one more extreme example of this attitude (or perhaps, platitude) is included as the 'postcard from New Zealand' (Appendix 3).

2. Negative Complacency ('despair'): Other stakeholders see the 'clean and green' brand New Zealand – and even the notion of 'branding' itself – as necessarily false and misleading; one respondent indicated the only thing 'green' about his New Zealand was possibly the algal blooms in the eutrophically polluted lakes of dairy country. Example: Respondent 4.

3. Low-Engagement Participation ('free riders'): Passive beneficiaries of the 'clean and green' brand New Zealand. Recognise marketing advantages conferred by the brand, but consider their own enterprise as being 'above the fray' and of little or no importance to the bigger picture. Examples: Respondents 2 and 5.

#### 4. High-Engagement Participation (brand leadership):

Recognises the 'clean and green' brand New Zealand as a possible pulpit from which to leverage higher brand value through exceptional proactivity, establishing ambitious sustainability targets as a means of besting the competition, if any. Examples: Respondents 6 and 10.

## Chapter 6.

### Conclusions and Recommendations

#### 5.1 Conclusions

The 'clean and green' national brand of New Zealand is a beautiful thing, priceless in its irreplaceability - and fragile. If some of its alluring curves are mere fluff, there is still enough substance remaining to lend heft to a substantial kernel of reality-based justification.

While other countries project relatively 'green' values (e.g. Norway, Iceland and the Netherlands), there is a very particular opalescent sheen to the New Zealand 'place myth' which provides a unique and somewhat priceless vision of what the last portion of paradise remaining on earth.

That such a glowing vision should prove at least partly illusory should come as little surprise given the globalised context of the 21<sup>st</sup> Century, but what seems most remarkable is the relative justification for such a fantastical green mythology.

The fact remains that, despite some significant 'warts' – 1080, dairy effluent and its resulting eutrophication, pollution of rivers and coastal seabed – many products of New Zealand origin do indeed represent a commitment to a 'clean and green' ethos which justifies a positive 'aura' on the global context, according to their origin and a notable prevalence of best practices represented thereby.

Simply put, the inspirational (and aspirational) attributes of the 'clean and green' national brand of New Zealand might arguably be seen in terms of world heritage significance – as a 'global good' representing simplicity, purity and sustainability.

The main threats to the integrity of the 'clean and green' national brand are its over-use without objective justification, which may be considered analogous to complacency - and its opposite, nihilistic despair over the known compromises (*e.g.* heavy national use of the highly toxic herbicide 1080, dairy effluent leading to massive eutrophication and decline in river water quality, risks of GMOs).

The policy challenge is clear, consisting of recognition of linkage between 'clean and green' (product origin) and '100% pure' (landscape and destination brand). As official recognition of the obvious linkage between the two might imply demanding policy obligations, such a linkage has been denied at the highest levels (Cumming 2010), with the result that each of the two brand aspects is reduced in credibility and value. A unified '100% pure clean and green' New Zealand, by contrast, would require New Zealand to embrace a set of core environmental values as intrinsic to the identity of the country, on a permanent basis protected from partisan table-turning.

While many would oppose such a stated objective on basis of profit or macroeconomic principle, it should be remembered that 'politics is the art of the possible,' and consensus is negotiable on basis of dialogue. The most obvious champions of green values might reasonably be sought in the Green Party of Aotearoa New Zealand, who (David Clendon<sup>4</sup> in particular ) have been most distinctly vocal in support of protection of the '100% Pure' and 'clean and green'. Fortunately there are counterpart activists on the other benches, including the 'Blue Greens' of the National Party which leads the current coalition government – under whom the spectre of mining concessions in national parks and other

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<sup>4</sup> For the transcript of a recent parliamentary debate on the subject, see: [http://www.parliament.nz/en-NZ/PB/Debates/Debates/6/c/e/49HansD\\_20091118\\_00000011-Questions-for-Oral-Answer-Questions-to-Ministers.htm](http://www.parliament.nz/en-NZ/PB/Debates/Debates/6/c/e/49HansD_20091118_00000011-Questions-for-Oral-Answer-Questions-to-Ministers.htm)

protected conservation areas caused a great deal of national anxiety during the first month of their rule, particularly among those concerned with the national brand.

*'Clean and green is how New Zealand markets itself to the world - with images of native forests, pristine lakes and rivers, unspoilt coastline and unusual wildlife. These natural assets underpin the "100 per cent Pure New Zealand" tourism brand, which is credited with leading a 50 per cent increase in visitor numbers in 10 years (though our tourism agency claims 100 per cent Pure is about the experience rather than the environment). Our clean, green image is vital not just to a tourism industry which now earns \$21 billion but to the produce exports vital to our economy'* (Cumming 2010, emphasis added).

Though it has been kicked around a bit as a political football, the question of whether there is (or should be) a direct relationship between 'clean and green' and the '100% Pure New Zealand destination brand (Everitt 2010). As a global consumer, the link is obvious – the immediate and primal association of New Zealand origin is likely to include images generally lush, green and evocative of unspoiled open spaces at the edge of the world. However, the question of to what extent such an image is sustained by scrutiny of environmental indicators, by which has emerged a recent internal contradiction. Time would seem to be of essence in negotiating risk of brand degradation through a collective national endorsement of a fundamental revalidation and unified commitment to a real greening of the New Zealand brand.

In order to reach a greater quorum, it should be emphasized that the national brand is not an abstraction, nor a fake<sup>5</sup> - but is a real, tangible and quantifiable<sup>6</sup> national asset.

In this, the bar has recently been set by New Zealand Trade and Enterprise:

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<sup>5</sup> From the author's observation, many kiwis –including those involved in green products and their marketing - find the term 'brand' to be knee-jerk abhorrent, equating branding with hype *prima facie*.

<sup>6</sup> Though the tantalizingly titled study (*Our clean green image: What's it worth?*) from the NZ Ministry for the Environment (2001a) would only provide an estimate of 'hundreds of millions, and possibly billions of dollars per year [of c. 2000 NZ Dollars], one suspects the actual current value to be much higher, particularly when the 'clean and green' origin brand is seen as a long-term national asset rather than a mere marketing gimmick.



*'By taking the best natural resources from our clean, pure environment and improving them, New Zealand is recognised around the world for its world-leading produce. New Zealand is today fusing leading technologies and research to create premium specialty goods - all the while installing systems to protect the environment and sustain resources for longevity' (2010).*

It is therefore necessary to critically examine the question of the 'clean and green' national brand, and the relative depth and existential reality of its values in the 21<sup>st</sup> century, some 30 years since it made its debut as a global meme.

Beyond the 'cash value' of such a global commodity, it should be further noted that as a *green idea*, the brand connotes high prestige to the country – and by extension and presumption (as we have learned) to its products and their producers.

Therefore, without 'letting down the side' through a candid, transparent and fully detailed assessment of the threats and opportunities facing the 'clean and green' national brand as a banner in standard of surety and sustainability. While there will always be some who opt out of involvement in the brand, there are others ready to take ownership. However – particularly in an age of Internet marketing – the dictum 'talk is cheap' has never been so timely and so tawdrily true.

It remains for the actual brand leaders and proud stakeholders of 'clean and green' to come together as a community of practice in order to affirm a set of common values, and define a set of corresponding principles for ensuring the practice and long-term sustainability of these values, which needs must include policy-makers as well as the private sector.

What is needed is multi-partisan policy support to green values across all line ministries at the highest levels of policy, for the sake of the future of New Zealand, and the sustainability of its macro-lucrative national brand and potential global role as a long-term leader trading on green values.

Further, recent efforts by individuals concerned with 'clean and green' brand values have shown that the task of re-validation and renewal of the brand is both coherent and tangible. Everitt (2010) has clearly articulated his vision for a Green Brand New Zealand strategy, which would address environmental performance, policy support to green business, and investment in a concerted global public relations initiative loudly and clearly defining New Zealand as a green leader. While Everitt enters the arena from the destination brand perspective, his vision clearly comprises a unified national brand – a 'clean and green' national landscape as both destination and as origin for products and services, building on the natural complementarity of a 'clean and green' *and* '100% Pure' New Zealand.

There is scope for collective re-validation of the brand, through concerted or convergent action based on definition and extension of commonly recognised standards of best practice.

Despite the lack of any clear advocacy body representing the interests of all self-identified stakeholders of the 'clean and green' national brand, respondents were uniformly optimistic of maintaining the credibility of the brand through cumulative publicity generated by a myriad of individual examples of various degrees of modesty or scale.

Among the most prescient and specific ideas and recommendations received from respondents was that of working together - albeit on an individual and voluntary basis, as an informal 'community of practice' - toward a clear formal definition of 'clean and green' and the criteria and indicators which define it, as the concept (or brand) relates to actual specifics of product, production and processing.

Specifically related to product category, these criteria may include assessment of sustainability of production and other aspects which add value to both product and brand,

such as greater transparency on the part of those innovative companies who invest in best practices or certification of compliance to voluntary standards.

Other such brand values may include:

- Products derived from systems of sustainable agriculture, fisheries, forestry and wild harvest
- Services and logistical aspects work toward reduced carbon footprint (efficiency of resource use, energy efficiency; and
- Social aspects of resource ownership and equity

**Specific recommendations on brand values, attributes and verification criteria are provided in summary form in Appendix 4 (Sustainability Criteria).**

## 6.2 Recommendations

### *6.2.1 Define Indicators of Sustainability*

Although respondents are suspicious of the very concept of branding, and yet more disinclined to casual use of words such as ‘green’ in its qualification (perhaps with some degree of justification), it is reasonable to assess compliance to voluntary performance standards, and it is possible to measure and monitor the ‘sustainability’ of a given production model according to specific criteria, for instance on the sustainability of a biofuel feedstock operation in respect to food security within the ‘foodshed’ of a global range of production models<sup>7</sup>.

### *6.2.2 Inventory of Best Practices (Codes of Practice)*

From a global standpoint, it often makes sense to undertake an inventory of ‘best practices’ (Codes of Practice) by product and product category in order to compile and assess the relative strengths of current and historical methods and methodologies. It should be noted that while best practices may often be innovative, some ‘classical’ artisanal methods cannot be surpassed for the extraction and processing of certain plant extracts and animal products (*e.g.* production of cold-crushed edible grade vegetable oils, and artisanal production of the highest quality flower oils and essences, and the finest wines and cheeses).

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<sup>7</sup> Masters, E., R. Rose, B. Watkins (2009). *Guidelines and Toolkit for Assessment and Mitigation of Food Security Impacts of Biofuels*. To Kimerica International for the Roundtable on Sustainable Biofuels (RSB): Lausanne. 63 pp.

### *6.2.2 Define Voluntary Standards, by (Verifiable) Internal Control System*

Aside from the basic processes of craft and chemical transformation which determine the quality of the final product, other aspects of production yield verifiable indicators of social, economic and environmental sustainability – a powerful statement of brand orientation based on transparency of operations and clearly defined principles and indicators of compliance and sustainability.

Within the geographically cohort of respondents, there were some notably positive examples of such brand ownership as brand management by Respondent 6 and Respondent 10, both of whom furnish excellent reference material in terms of its imagery and content, as well as an eminently proactive brand position based on full transparency of source and content.

### 6.2.3 Adopt 'Deep Origin' Green Branding Attributes by Product Category

Deep origin branding implies attention to micro-source, via systems of traceability and quality assurance, at the specific locality or landscape level.

Green branding of products of NZ origin takes in a historical context of phenomenal success at brand recognition and coherence, but one that is truly 'larger than life' in that it has surpassed the messy details and limitations in the land of Aotearoa and its management, underpinning the brand and its credibility.

Though terms such as 'clean' and 'green' have little or no intrinsic (objective) significance, they describe brand attributes based on criteria which are largely verifiable and in some cases readily quantifiable. The author posits that respondents are largely culturally

dismissive of the boastful or empty cliché, preferring contentment with the contribution of a brand which lives up to its stated values with honesty, humility, and simplicity.

While from a policy standpoint, there is little or no institutional framework to serve as a structure from which the brand may be revalidated, or the claims of individual enterprises assessed for validity by impartial audit according to objectively verifiable criteria.

However, there is an emerging – and increasingly coherent – trend toward confluence between enterprises separated by geography and product type, who are effectively establishing the informal codes of best practice and standards of quality and conduct (*e.g.* sustainable harvest and sourcing arrangements) which may form the basis of a restoration of the credibility of the national brand, in favourable contrast to a recently documented decline in environmental indicators <sup>8</sup>

One respondent, Zealong Tea, discounted the risk of diminution of the brand, while representing a huge investment in green-identified marketing which may be said to derive maximum value from its ‘clean and green’ positioning, including attention to the transformative effects of conversion of dairy to organic tea estate at the landscape level. So effective is the presentation, its symbology and sheer aesthetic content, that in turn it may be said to sustain – or even advance – the global position of the ‘clean and green’ brand New Zealand .

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<sup>8</sup> OECD (2007). OECD Environmental Performance Review of New Zealand. Organisation for Economic Co-operation and Development (OECD). 10 pp. Online at: <http://www.oecd.org/dataoecd/6/6/37915514.pdf>

### *Packaging Content: 'Best Practice' Branding*

The case studies provide a range of approaches to green branding of functional foods and other natural products of New Zealand origin, ranging from essentially minimal content and presentation, to sophisticated and even excessively rich promotional presence. At its apotheosis, such branding 'feeds back' to the greater brand - adding value to the national brand itself through their adept (and remunerative) use of its idiom. This may be considered brand leadership, and brand Aotearoa New Zealand needs such brand leaders to preserve its integrity and long-term value.

There are some commonalities to the finest examples of 'clean and green' New Zealand branding, which may feature high-resolution plant imagery on monochrome (black or white) background. Tree fern predominates, but other plants represent sources of natural products unique to New Zealand, such as Manuka and Horopito. Lush landscapes are used to deliver a sense of scale and majesty of the New Zealand origin.

Connection to landscape may be balanced with connection to the geo-cultural landscape of Aotearoa New Zealand, beginning with its isolation from the primordial supercontinent Gondwanaland, not long following the age of the dinosaurs, to the unique indigenous flora and the traditional uses of plants by the Maori *Iwi* over the centuries.

Just as Maori design carries the curvilinear attributes of nature – as in the graceful fern, as in the tail of the breaching whale - effectively fixing the beauty of the landscape in its very specific geographic context, so do the visual attributes of Brand Aotearoa inspire a coherent vision of purity, simplicity and grace.

It seems clear that, whatever path is negotiated by its stakeholders, it will be important for to establish a common understanding of the core attributes of the 'clean and green' national brand, which might include and comprise a core definition of the term.

Whereas 'clean' may be taken as a simple statement of purity (as a secondary descriptive or qualifier of the core value), the word also connotes transparency and relative purity from ethical (or other) corruption; closely related is the concept of purity, as embodied in the slogan '100% Pure New Zealand'. Defining 'green' is more daunting – but more readily verifiable according to indicators of sustainability, including economic, social and environmental. There would seem to be a logical connection between environmental sustainability and core environmental values such as sustainable land-use at the farm and landscape levels, and protection of downstream freshwater resources and the marine environment.

Multi-partisan political support for national legislation favoring long-term conservation values, including referenda where necessary on such questions as the use of internationally proscribed agricultural chemicals, tolerance for water pollution and eutrophication through industrial runoff, and use of genetically modified organisms (GMOs).

Unfortunately, the environment has become a strongly partisan issue, the efforts of the 'Blue Greens' (itself not a bad concept) notwithstanding.

At the same time, it would be foolish to suggest that government carry the heaviest load as regards to protecting the 'clean and green' brand, though line ministries including Agriculture, Commerce and Industry and Environment will have their inputs, in support of the national brand. Individual companies and enterprises need to be seen in the forefront of



green innovation, including the largest as well as the smallest, who seem to enjoy an advantage in terms of perceived integrity and commitment to green values despite their meagre resources and their limited focus on locally-specific markets.

#### 6.2.4 Limitations and Future Research

The primary limitations on this study were those of scale, time and distance. The author was resident in Africa during most of the study, and was thus dependent on long-distance communications with which to conduct the case studies, having conducted initial interviews during two visits of several weeks during January and March of 2010. As a result, response to the case study survey was sub-optimal to say the least, with only 10 full and relevant responses from a population of 220 targeted potential respondents. Future research should involve a far greater number of respondents, and should ideally include a sampled population of global consumers of various degrees of geographic and cultural distance from New Zealand, with attention to varying degrees of awareness of the environmental realities of the country. Finally, the relationship between the '100% Pure' and 'Clean and Green' national brands should be included more explicitly in future research, as well as the concomitant relationship between destination and origin branding.

The easiest recommendation to make on basis of this study is that committed individuals - including those embedded in specific enterprises and institutions – take advantage of electronic and all other media to maintain an open exchange, in order to develop a harmonized dialogue and discourse focused on best practices reinforcing 'pure green' brand values.

The distinction should be made between public relations, in which true stories are told in support of a product or enterprise, and advertising, which can be based on all manner of

manipulation – from selective presentation to downright fiction. In all manners green, transparency must be seen as a core value; all claims, from product-specific to grandiose<sup>9</sup> should be assessed for content – rational, verbal – to balance and ground more visual and emotive attributes, effectively selling consumption of ‘clean and green’ products as a hedonic value proposition, as proposed by Hartmann et al (2005).

In conclusion, it is hoped that this assessment may be considered as an initial reference useful in the process of revalidation of the ‘clean and green’ national brand, with attention to attributes such as green thinking and transparency of origin which effectively ‘upgrade’ the ‘clean and green’ national brand for the 21<sup>st</sup> Century – call it Brand Aotearoa.

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<sup>9</sup> viz ‘a pair of islands which never been polluted’ (see Appendix 3)

## **Appendix 1: Contacts and Relevant Links**

### **New Zealand Business Council for Sustainable Development (NZBCSD)**

PO Box 1665  
Shortland Street  
Auckland  
Phone: +64 9 525 9727  
Fax: +64 9 580 1071  
Email: [office@nzbcSD.org.nz](mailto:office@nzbcSD.org.nz)  
Website: <http://www.nzbcSD.org.nz/contact.asp>

### **Sustainability Council of NZ**

P.O. Box 24304  
Wellington  
Tel 04-9133655  
Fax 04-9133760  
Email: [council@sustainabilitynz.org](mailto:council@sustainabilitynz.org)  
Website: <http://www.sustainabilitynz.org/>

### **Sustainable Business Network**

L1/3067 Great North Rd, New Lynn  
PO Box 15677  
New Lynn, Waitakere, 0600  
Phone: 09 826 0394  
Fax: 09 826 5648  
Rachel Brown, Chief Executive Officer  
Phone: 09 826 0952  
Mobile: 021 686 158  
Email: [rachel@sustainable.org.nz](mailto:rachel@sustainable.org.nz)  
Sarah Munro, Programme Coordinator  
Phone: 09 826 0735  
Mobile: 021 686 619  
Email: [sarah@sustainable.org.nz](mailto:sarah@sustainable.org.nz)  
<http://www.sustainable.org.nz/>

### **Sustainable Aotearoa New Zealand Inc (Phase 2)**

PO Box 11421, Ellerslie 1542  
Auckland, New Zealand  
Email: [sanzATphase2.org](mailto:sanzATphase2.org)  
(Replace AT with @)  
Executive Director: Wendy Reid, Auckland  
<http://sites.google.com/site/strongsustainability/about-sanz>

### **Made From New Zealand**

<http://www.madefromnewzealand.com/>

**Ministry for the Environment**

Environment House  
23 Kate Sheppard Place,  
Thorndon  
Wellington  
New Zealand  
PO Box 10362  
Wellington 6143

New Zealand  
Freephone: 0800 499 700  
Phone: +64 4 439 7400  
Fax: +64 4 439 7700

Email: [information@mfe.govt.nz](mailto:information@mfe.govt.nz)

Website: <http://www.mfe.govt.nz/>

Ministry of Agriculture and Forestry

Pastoral House  
25 The Terrace

PO Box 2526  
Wellington 6140  
New Zealand

By Email

All MAF general enquiries [info@maf.govt.nz](mailto:info@maf.govt.nz)

Website: [www.maf.govt.nz/](http://www.maf.govt.nz/)

By Phone (within New Zealand)

All general enquiries 0800 00 83 33

By Phone (calling from overseas)

All enquiries +64 4 894 0100

By Fax

All enquiries +64 4 894 0720

**Ministry of Economic Development**

33 Bowen Street  
PO Box 1473  
Wellington, New Zealand

Tel.: +64-4-472 0030

Fax: +64-4-473 4638

Queries on the Ministry: [info@med.govt.nz](mailto:info@med.govt.nz)

<http://www.med.govt.nz/>

<http://www.sustainability.govt.nz/>

**Ministry of Foreign Affairs & Trade**

195 Lambton Quay  
Private Bag 18 901  
Wellington, New Zealand

Tel. +64 4 439 8000

Fax +64 4 439 8505

Email: [enquiries@mfat.govt.nz](mailto:enquiries@mfat.govt.nz)

## **Appendix 2: Survey Questionnaire**

**Question 1:** How has your product offering and/or company brand benefited from the 'clean and green' image of Aotearoa New Zealand – which some would call a 'stereotype' or, more unkindly, even a 'myth'?

**Question 2:** To what extent are you and/or your company concerned with presenting a 'clean and green' image to the global marketplace?

**Question 3:** Please provide examples (with as much detail as possible) of how your company or its product offering has distinguished itself through 'green branding' and/or attention to sustainability criteria.

**Question 4:** How do you feel your company can contribute to a re-validation and renewal of the 'clean and green' national brand of Aotearoa New Zealand, against recent media and other trends which have denounced this pervasive brand image as an increasingly hollow 'myth'?

**Question 5:** What other forms of external (e.g. policy) support or other intervention do you feel will be necessary to facilitate this process, at the national and global levels?

### Appendix 3: 'Postcard from New Zealand'

<http://www.naturalproductsnz.org/7-reasons-to-pay-attention-to-new-zealand-now/#comments>

***Picture a pair of islands where the water, sky and land have never been polluted [sic] and the nearest neighbor is more than 1,000 miles away. Imagine they have rolling green hills nourished by year-round rains, moderate temperatures and abundant sunshine. Sheep outnumber humans 10-to-1, and the humans who live there are fiercely protective of this land's natural resources. What sounds like a dream is actually New Zealand, a country ready to break onto the natural products scene in a big way.***

"The vast majority of products from New Zealand are natural because there's so little intervention in their production," says Kelly Duffy, New Zealand Trade and Enterprise's sector lead in Los Angeles for foods and beverages. "By and large, New Zealand is free of genetically modified organisms. There certainly is no use of [recombinant bovine growth hormones like] rBST. Antibiotics are only used on an as-needed basis. Because the animals are out wandering around, breathing fresh air and not in factory farms, they don't spread disease."

Those views may explain why New Zealand exports to the U.S. from January to June 2009 totaled more than \$1.7 billion, according to Statistics New Zealand. SNZ reports the top food export categories to the U.S. in 2009 were meat, dairy, eggs, honey, beverages, fish and seafood, fruits and nuts. Here, we take a look at some of the foods in these categories and the reasons for their popularity.

#### Dairy

From butter, cheese and ice cream to powdered milk proteins, dairy is New Zealand's biggest international export. What's the appeal? "It comes back to the quality of the grass and the water" used to feed the dairy animals, says Kathryn MacDonnell, sales and marketing manager for Blue River Dairy in Invercargill, New Zealand, which makes cheese and ice cream from sheep's milk. "The milk is slightly sweeter, the color is creamier." These characteristics carry through to its popular soft and hard cheeses. "We developed our pecorino as a table cheese," MacDonnell says. "A lot of Pecorino Romano from Italy is grated and used in cooking [to add a salty flavor]. We don't use as much salt. That comes from the New Zealand palate—we don't use a lot of cheese in cooking; we like to eat it as it comes."

#### Lamb

For some, New Zealand lamb just tastes better. That may be because virtually every lamb is free range and grass fed on the island. "It's the most cost-effective way to raise the livestock. The rain comes, the grass grows, the lambs go eat it," says Andrew Atkins, president of Atkins Ranch, a Fremont, Calif.-based cooperative comprising hundreds of New Zealand sheep ranchers. In the U.S., he says, "some livestock might be free range for a portion of their lives, but [typically] the last period is an intensive feedlot situation. We don't feedlot in New Zealand." And that makes a difference in the flavor profile as well. The lambs stay leaner, giving them what New Zealand Trade and Enterprises' Duffy calls a more robust flavor. "You can actually taste clover in New Zealand lamb," she says.

### Manuka honey

Honey has been used topically to heal wounds since the days of Aristotle. Manuka honey—a darker, less sweet syrup derived from the manuka trees that dot New Zealand’s coastline—has very high levels of antimicrobial activity, outperforming other honeys 2-to-1 in fighting E. coli and other bacteria, according to researchers at the University of Waikato in Hamilton, New Zealand. “It can work at high temperatures and still retain its enzyme activity,” says David Noll, owner of Pacific Resources, a Carpinteria, Calif., importer of New Zealand products. Other honeys start to lose their effectiveness at 62 degrees or higher. “People are looking to treat themselves instead of going to the doctor for every little thing,” says Noll, who adds that sales of his manuka honey have more than doubled for the past three years.

### Wine

New Zealand’s cool climate allows for extended ripening of grapes—and flavor—on the vine, says Michael Wentworth, marketing manager for Yealands Estate wines in Blenheim, New Zealand. “This typically results in the production of intense, fruit-driven wines,” with a unique terroir reflecting their favorable growing conditions, he says. “While the wines have prominent fruit, the ‘finish’ is typically dry.” That combination has proved popular in the U.S., where in a year’s time the company has achieved distribution in 30 states.

### Fruit

Sure, the Kiwis send us kiwis. But what you may not know is they also export apples. The hybrid known as Jazz was cultivated to offer the crunch of Braeburns and the sweetness of Galas while also withstanding the rigors of shipping. “New Zealand apples are sold in North America during the spring and summer months, when domestic apples have been in cold storage since the previous autumn. Savvy consumers know the difference and select the fresh crop fruit,” says Karin Gardner, spokeswoman for The Oppenheimer Group, the North American marketer of ENZA apples and pears. Plus, she says, “A New Zealand apple sold during its spring/summer season could have a much smaller greenhouse gas contribution than a domestic apple that had been in storage for six months by that time.”

### Specialty products

PCC Natural Markets in Washington and New York-based specialty food retailer Dean & DeLuca are among U.S. stores that have signed on to carry fruit pastes from Rutherford & Meyer. “Americans are starting to understand more about what to do with fruit paste,” says Jan Meyer, co-owner of the Wellington, New Zealand-based gourmet food producer. This versatile, tangy paste is most commonly served with cheese and crackers, but Americans’ puzzlement is understandable. “No one in the United States is doing the type of product that we’ve done; no one is doing it with the number of flavors that we do it with,” Meyer says. “Ours is a far more sliceable product. We cook ours a lot less. We wanted to give it a more full, fresh-fruit flavor.”

## Avocado oil

This oil, with its bright green color and nutty flavor, is something few Americans have tasted —yet. “We’re in the early stages of distribution in the United States,” says Bruce Lahood, spokesman for Grove Avocado Oil. “But we’re ready to pounce at any point.” High in monounsaturated fats, low in saturated fats, and rich in cholesterol-fighting sterols, as well as vitamins A, D, and E, some experts believe avocado oil is even healthier than olive oil. And with a smoke point above 500 degrees and infused flavors like lime and garlic, it can be used for cooking as well as for dipping.

## Local considerations

The high quality of New Zealand products helps most U.S. consumers overlook the long distance that such foods travel to arrive in the store. According to a 2009 report that New Zealand Trade and Enterprise commissioned from Bellevue, Wash.-based market research firm The Hartman Group, “Concerns about food miles and/or carbon footprint typically [do] little to exlude a purchase, assuming quality criteria have been met.” And Karin Gardner, spokeswoman for The Oppenheimer Group, the North American marketer of ENZA apples and pears, says distance is just one component of carbon footprint. “Experts estimate that transportation contributes 2 percent to 10 percent of a food’s impact on the environment. We need to look at the entire supply chain, and consider the impact of everything from water use to fertilizer to packaging to storage and, ultimately, marketing.”

*Laurie Budgar is a Longmont, Colo.[USA]-based freelance writer and editor who thinks a glass of New Zealand pinot noir sounds like the perfect end to a long day.*

## **READER COMMENTS :**

***While it's true that New Zealand foods are tastier and safer than USA foods, the author has probably never been to New Zealand or he/she would know that virtually all our rivers are polluted, we have major land pollution problems from pesticides, herbicides, over use of fertilizers, and particularly urine and fecal matter from dairy cattle. As a result, we grow very little organic food, proportionally. Furthermore, even though we don't grow GM food, we experiment a lot with GM foods, animals and trees and over 30% of our processed food in supermarkets contains GM ingredients.***

**Posted By: Charles Drace on June 02, 2010**

<http://naturalfoodsmerchandiser.com/DesktopModules/EngagePublish/printerfriendly.aspx?itemId=4671&PortalId=0&TabId=104>



## **Appendix 4. Sustainability Criteria**

### **5.2.1 Product Categories**

Product categories covered by the study range include:

1. Edible products and naturally-derived drinks ,
2. Various plant, marine and bee product extracts
3. Skin-care and body-care products,
4. Natural household cleaning products
5. Natural paints and finishes
6. Plant-derived biofuels

Draft Recommendations by product category:

#### **1. Edible products and naturally-derived drinks**

Keep concepts 'simple and honest'

Differentiate micro-origins (watershed level) and production methods

Local and regional markets most stable and consistent

#### **2. Various plant, marine and bee product extracts [and]**

#### **3. Skin-care and body-care products**

Project understated purity and simplicity

'Cool value' of remoteness (the 'edge of the world')

Resource sustainability and equity are key issues

Differentiate micro-origins (watershed level) and production methods

#### **6. Plant-derived biofuels**

Relationship of Stewardship to land

Degree of eutrophication or its mitigation

On-farm

Downstream

#### **All Product Categories**

**Keep use of words meaningful – 100% natural?? –**

**Design: clean, understated, textural – predominant vegetation and earth-tones**

Clean and Simple – line design, e.g. Maori line design in logos

Use of non-seraphed fonts

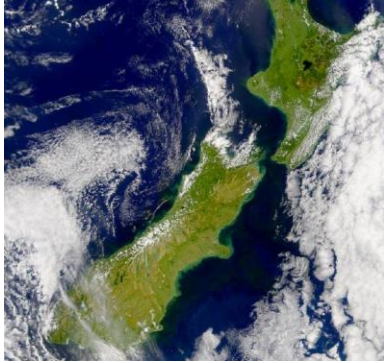
#### **Place Branding: Location-specific origin or venue**

Geographic Denomination

## Appendix 5. 'Clean and Green' Iconic Imagery: A Visual Tour of Brand Aotearoa

### What are the visual (and emotive) attributes of Brand Aotearoa values ?

#### 1. Green on Blue – in a farthest corner of the globe, the 'Land of the Long White Cloud'

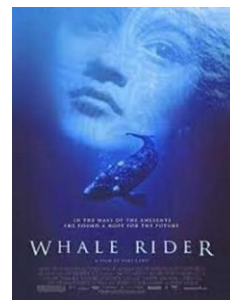


**Aotearoa : 'Land of the Long White Cloud'** – a manufactured word? Itself a construct of the settler era, perhaps invented as an after-the-fact anachronism, once the coastal great forests had fallen to the axe and saw, most of its unique fauna (e.g. the two-meter Moa bird and other wonders). Just as might be said of the concept of New Zealand – a most remote outpost of the 'New World' – the concept of Aotearoa becomes not so much primordial in its connection to the landscape, but rather inclusive of the impacts and orientations of human history, by which it is seen to be a hybrid, a synthesis of attributes neither wholly pure in all respects, nor anywhere near as trodden and deracinated as other regions of the globe.

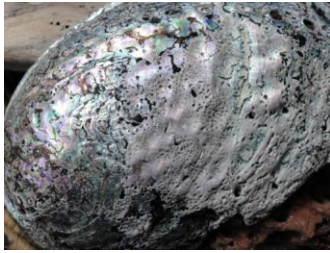
#### 2. Kiwi [walking through quiet forest of tree-fern]



#### 3. Whale [Whale Rider]



#### 4. Kaua shell



Mother of pearl, collected from wild populations according to the Maori custom of communal feasts; polychrome rainbow palette; other marine foods are iconic and globally significant, such as green mussel, which also lends vivid colour to a healthful indigenous seafood.

#### 5. Maori line art



Unique linear constructions evocative of a stylized symmetry, with curlicue and angular detail; symbolic of natural form including elements of tree-fern; fern-curls are ubiquitous as an art deco detail from the natural world.

#### Greenstone and its shapes



#### Wood-carving (and Marae)



## Natural Products Brand Images (from case studies)

### Uniquely New Zealand

It is the potent properties of New Zealand's precious native ingredients that make Living Nature products so effective:

-  **Active Manuka Honey**  
Healing, rejuvenating and moisturising
-  **Harakeke**  
Extra-hydrating and soothing, an alternative to petrochemical derived gels
-  **Totara**  
Super anti-oxidant
-  **Manuka**  
Potent anti-microbial
-  **Kumerahou**  
Cleansing and lathering, an alternative to harsh detergents
-  **Haloysite Clay**  
Exfoliating and deeply cleansing
-  **Kelp**  
Nutrient-rich and nourishing





## Living Nature – 100% natural, uniquely New Zealand.

Living Nature is proudly 100% natural, setting some of the world's highest natural skincare standards. We have harnessed the power of New Zealand's unique native botanicals with their incredible purifying, healing and nourishing properties.

We invite you to try the Living Nature range, and discover the benefits of New Zealand's unique native botanicals for yourself.  
Like to know more?  
Visit [www.livingnature.com](http://www.livingnature.com)

Kerikeri, New Zealand  
Leicestershire, England

  
**LIVING NATURE**  
100% Natural. Uniquely New Zealand.

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## 100% natural

When it comes to skincare, what you leave out is as important as what you put in.

So we take great care to ensure we never include any potentially harmful substances in our skin and personal care products. They are certified 100% free from:

- Synthetic preservatives, such as parabens or phenoxyethanol
- Harsh surfactants, such as sodium, ammonium and lauryl/laureth sulphates
- Petrochemicals, including PEGs, paraffin and other glycols
- Silicones
- Mineral oils
- Genetically modified or irradiated ingredients
- Artificial fragrances
- Grain alcohols
- Chemical sun protection filters.

## Nature's wisdom, world-class science

We have researched and developed our own formulations to harness the powerful purifying, healing and nourishing properties of New Zealand's native plants. Every Living Nature product undergoes rigorous testing for purity and safety. Our skincare ingredients and products are independently tested for effectiveness.

- Independently proven to be safe and effective
- **Certified Natural by BDIH Germany**, a world-leading independent auditor of natural skincare and cosmetics. This means that our products have satisfied BDIH's stringent standards of purity and natural origin.



## We care for you and the environment

We refuse to compromise on the sustainability of our environment, or the welfare of our customers.

To make our core products we use only carbon-neutral hydro and wind energy, and pure, filtered rainwater – free from chlorine and fluoride.

Our simple, fully recyclable packaging:

- Meets the highest EU environmental standards
- Minimises product contact with air and other contaminants

- Is 100% free of phthalates

Our paper and cartons:

- Come from renewable, managed forests
- Are dioxin and elemental chlorine free, as are the inks we use.

Our products are free from animal-derived ingredients except for humanely-obtained beeswax, honey and lactose. We do not test on animals, nor do we support companies that undertake animal testing.



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