

Report to  
**MINISTRY FOR THE ENVIRONMENT**

***APPENDIX 3***  
***TO***

**ECONOMIC RISKS AND OPPORTUNITIES  
FROM THE RELEASE OF  
GENETICALLY MODIFIED ORGANISMS  
IN NEW ZEALAND**

***Market Research Report: The effect of GMO  
release on market perceptions of the New Zealand  
Environment***

***Consumer Segment***

**FEBRUARY 2003**



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## **A. OBJECTIVES**

This report forms part of a wider study undertaken by Business and Economic Research Limited (BERL) and the Agribusiness and Economics Research Unit (AERU), Lincoln University. The study, commissioned by the Ministry for the Environment, seeks to identify the key economic opportunities of, and risks from, the release of genetically modified organisms (GMOs) in New Zealand, and the effect of this on our clean green image.

The research undertaken by NRB comprises an international survey of both market buyers (gatekeepers) and consumers.

The objectives of this, the consumer survey, were as follows:

- To gauge overseas consumers' image of the New Zealand environment
- To gauge how this image would change in response to different scenarios in which GMOs are released into the New Zealand environment
- To measure overseas consumers' "willingness to pay", should New Zealand release GMOs into the environment
- To gauge the current likely market perception and reaction if New Zealand refrained from GMO release, while other countries did not.

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## **B. SURVEY SPECIFICATIONS**

### **Sample Size and Stratification**

A net sample of 444 people were interviewed on the basis of one per household. Interviews were conducted in three countries as follows:

Australia	150
United Kingdom	150
United States	144

In order to focus the study on areas where New Zealand produce is thought to be more widely available, the following regions of each country were sampled:

Australia	- all
United Kingdom	- England
United States	- California, Oregon and Washington

### **Sample Source**

Samples of randomly generated telephone numbers for each of the three countries were provided by specialised phone sample suppliers, operating within the market research industry.

### **Respondent Selection**

Quota sampling was used to ensure an even balance of both male and female respondents, and of different age groups, with the samples stratified according to state, city or region to ensure proportional numbers in each. Respondents for interviews were aged 18 years or over.

## **Method**

All interviewing was conducted by telephone, with calls being made on evenings and weekends as per the correct time zone(s) for each country. Calling times were as follows:

Australia	Weekday	6.00pm – 8.00pm, local time
	Weekend	10.00am – 8.00pm, local time
England	Weekend	10.00am – 7.00pm, local time
United States	Weekend	10.00am – 8.00pm, local time

## **Call backs**

Three call backs. i.e. four calls in total, were made to a residence before the number was replaced in the sample. Callbacks were made on a different day and at a different time.

## **Survey Dates**

All interviews were conducted in December 2002 and January 2003.

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## C. EXECUTIVE SUMMARY

### Relative Image of the New Zealand Environment

1. Respondents' image of the New Zealand environment was excellent, with approximately one-third of all respondents rating New Zealand "Very Good, among the best", and a further 48% thinking New Zealand's environment "Good, above the average".
2. New Zealand's environment was rated highly by respondents from all three countries, along with those of Switzerland and Canada.
3. The New Zealand environment was rated highest in the United Kingdom, where 41% of respondents thought it to be "Very Good, among the best".

### Summary Table – Image of the New Zealand Environment

	Australia %	United Kingdom %	United States %	Total %
Very good – among the best	27	41	29	32
Good – above average	58	44	41	48
Average	9	8	9	9
Not good – below average	1	2	1	1
Bad – among the worst	1	-	-	-
No image	5	5	19	10

NB. Percentages may not add to 100 due to rounding.

## Image Change

Approximately one-third of all respondents stated that their image of the New Zealand environment would get worse, should New Zealand use GMOs in pest control or livestock feed.

1. Respondents were more tolerant of the use of GMOs in disease prevention, with only 19% overall stating that their view of the New Zealand environment would worsen under this scenario. Conversely, 39% of all respondents said that New Zealand's environmental image would improve.
2. One-third of the respondents stated that their image of the New Zealand environment would improve under a scenario in which New Zealand did not use GMOs, while over half said that their view would remain unchanged.
3. Respondents in the United Kingdom were most averse to New Zealand's use of GMOs, with 43% stating their image of the environment would worsen under the pest control scenario, and 51% stating this under the livestock feed scenario. However, 41% said their image of New Zealand's environment would improve should it use GMOs to prevent disease.
4. Australian and American respondents were more open to New Zealand's use of GMOs under the different scenarios.

### Summary Table - How Respondents' Image of the New Zealand Environment Would Change Under Different Scenarios

		Pest Control %	Livestock Feed %	Disease Prevention %	No GMOs %
Get Better	Australia	33	31	35	29
	United Kingdom	19	18	41	45
	United States	24	29	40	24
	Total	25	26	39	33
Stay the Same	Australia	30	27	32	59
	United Kingdom	27	23	27	44
	United States	30	37	29	58
	Total	29	29	29	54
Get Worse	Australia	27	34	21	8
	United Kingdom	43	51	17	3
	United States	27	24	18	8
	Total	32	37	19	6
Don't Know	Australia	10	8	12	4
	United Kingdom	11	7	15	8
	United States	19	10	13	10
	Total	14	9	13	7

NB. Percentages may not add to 100 due to rounding.

## Purchase Change

1. When confronted with a scenario in which the respondent was choosing a non-GM product, that came from a country which used genetic modification (GM) in other ways, the majority of respondents said that they would feel no different to before. This accounted for 43% of all respondents in the fruit scenario, and 54% of respondents under the dairy products scenario.
2. Between one-quarter and one-third of respondents said that they would be less inclined to purchase the product under the fruit and dairy scenarios. Of these respondents, the majority stated that they would not buy the product regardless of any discount applied.
3. Respondents appeared more comfortable buying a dairy product from New Zealand should it use GM, than they were purchasing fruit, with fewer respondents less inclined to make such a purchase.
4. When choosing a holiday, respondents were less likely to be affected by New Zealand's GM status, with 72% overall stating that they would feel no different about choosing a New Zealand holiday should New Zealand use GM.
5. Respondents reacted far more favourably to a scenario in which New Zealand did not use GMOs, with approximately 90% feeling no different to before, or feeling more inclined to purchase New Zealand fruit. The majority of respondents were prepared to buy this product with a premium applied.

### Summary Table - How Respondents' Purchasing Behaviour Would Change Under Different Scenarios

		Purchasing Fruit %	Choosing Holiday %	Purchasing Dairy Prod. %	No GMOs %
More inclined	Australia	14	11	13	45
	United Kingdom	6	7	7	55
	United States	16	9	11	40
	Total	12	9	11	47
No Different	Australia	43	73	58	47
	United Kingdom	41	65	47	33
	United States	44	77	57	49
	Total	43	72	54	43
Less Inclined	Australia	36	13	25	2
	United Kingdom	37	13	32	1
	United States	30	11	26	4
	Total	35	12	28	2
Depends on product	Australia	7	4	4	6
	United Kingdom	16	14	13	11
	United States	10	3	6	6
	Total	11	7	8	8

NB. Percentages may not add to 100 due to rounding.

***Cautionary Notes***

1. In generalising from scenarios as presented in a research setting to the real market equivalent, we should be aware that two influences pull strongly toward a fading of the research-measured reaction. The first relates to information at point-of-sale. It is unlikely that consumers would know, or bring-to-mind at point-of-sale, the genetic modification (GM) attributes of New Zealand in other contexts. Secondly, the price-quality characteristics of the product, relative to those from other countries will assume a powerful if not predominant influence in the product choice, including in particular trade-offs of immediate tangibles (cost, appeal) against intangible and more remote perceptions of GMOs.
2. The durability of the above figures will depend on the dissemination of favourable, unfavourable and neutral information about GMOs, and the way this is received by the public. Repeat measures are appropriate in the relatively early phase of public understanding. In particular, it is common for people to be cautious about such innovations until sufficient time has elapsed for them to be proven.

\* \* \* \* \*

## D. FINDINGS IN DETAIL

### 1. Relative Image of the New Zealand Environment

*“I’ll read out the names of some countries. Would you please answer by saying whether your image of their environment was...*

*very good, among the best,*

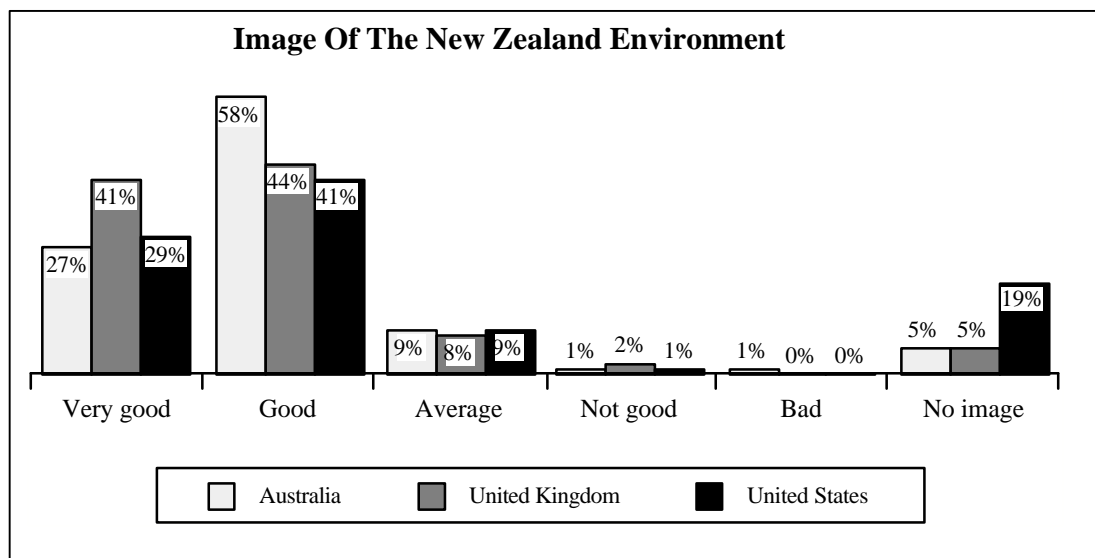
*OR just good, above the average,*

*OR average, say in the middle,*

*OR not very good, below the average,*

*OR relatively bad, among the worst.*

*Of course if no image comes to your mind at all, just say “no image”.*”



NB. Percentages may not add to 100 due to rounding.

- The image of the New Zealand environment was “Good, above the average” amongst the majority of respondents, and across all three countries.
- New Zealand’s image is best in the United Kingdom, where 41% of respondents rated the New Zealand environment “Very Good – Among the Best”, as compared to 29% in the United States and 27% in Australia.
- A large number (19%) of United States respondents had no image of the New Zealand environment.

**Relative Image of the Environment of Selected Countries - Respondents Rating Country “Very Good - Among the Best” or “Good - Above the Average”**

	Australia % (Rank)	United Kingdom % (Rank)	United States % (Rank)
New Zealand	85 (1)	85 (1)	70 (2)
Switzerland	77 (2)	83 (2)	77 (1)
Canada	77 (2)	78 (3)	69 (3)
Australia	63 (4)	67 (4)	55 (4)
Netherlands	49 (5)	55 (5)	47 (5)
Japan	29 (6)	27 (6)	27 (8)
United Kingdom	27 (7)	24 (7)	31 (7)
United States	21 (8)	20 (9)	33 (6)
South Africa	11 (9)	21 (8)	15 (9)
Thailand	11 (9)	10 (11)	11 (11)
China	11 (9)	9 (12)	9 (12)
Argentina	5 (12)	11 (10)	12 (10)
Mexico	5 (12)	7 (13)	4 (13)

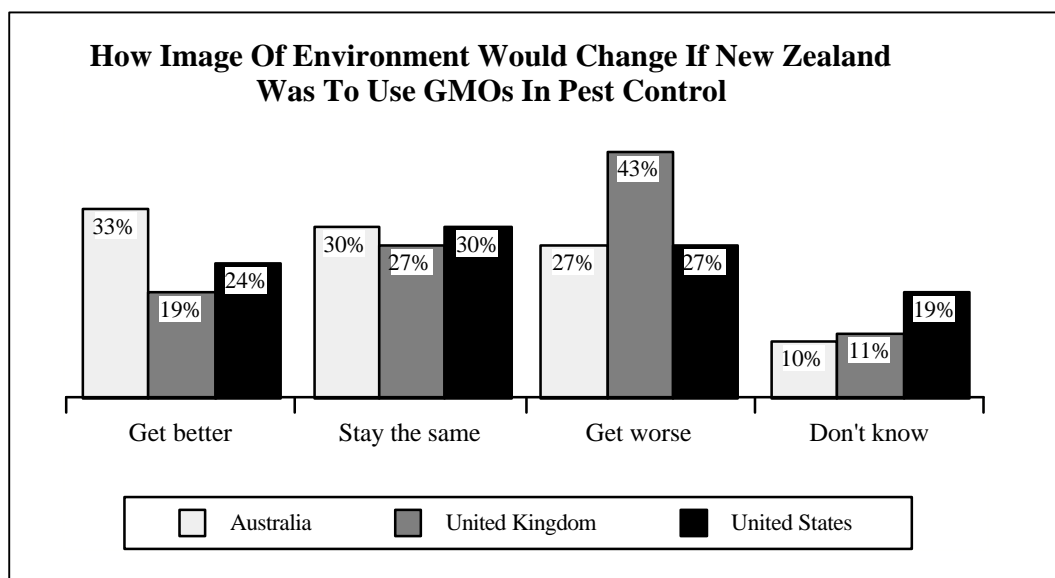
- When compared with a number of other countries, the image of New Zealand’s environment consistently ranked highly, along with Switzerland and Canada, and ahead of Australia.
- Nearly all respondents (85%) in Australia and the United Kingdom felt that the New Zealand environment is “Very Good – Among the Best” or “Good – Above Average”. This number was significantly lower in the United States (70%).
- As a result New Zealand ranked highest of the selected countries, when put to Australian and English respondents. In contrast, more American respondents rated Switzerland’s environment “Good” or “Very Good”, than they did New Zealand’s.

## 2. Image Change – GMOs In Pest Control

*“Suppose New Zealand was one of two or three countries that used genetic technology to control local pests such as rats or wasps. For example, a gene which caused them to breed less often was put into a number of rats or wasps. These are then released to mix with those in the wild so that the gene is passed around.”*

*“Would your image of that country’s environment get better, stay the same, or get worse?”*

If better or worse: *“Can you say why?”*



NB. Percentages may not add to 100 due to rounding.

- Given the pest control scenario, the majority of respondents felt their image of New Zealand would worsen. Those in the United Kingdom were most averse to using GMOs to control pests with 43% stating that their image of New Zealand would get worse. This compares with just over a quarter (27%) of Australian and American respondents.
- Approximately one-quarter of respondents felt that their image of the New Zealand environment would stay the same. This peaked at 30% in Australia and the United States.
- A smaller number said that their image of the environment would get better. Australian respondents were most open to the idea of GMOs for pest control, with 33% saying that New Zealand’s image would improve.
- A relatively large proportion of respondents did not know how their image of New Zealand would change, particularly those respondents from the United States (19%).

### Comments Regarding the Use of GMOs In Pest Control

	Australia %	United Kingdom %	United States %
<b>Positive Comments (Top Five Mentions)</b>			
It would be an improvement	5	7	5
Should be controlled	6	4	6
Eradicate pests	9	4	2
There would be less pests	8	2	5
Helping the environment	7	3	4
<b>Negative Comments (Top Four Mentions)</b>			
Interfering with nature	7	17	10
Could be dangerous/have side effects	8	10	13
Don't know the consequences	7	8	6
Don't approve of GM technology	5	11	4

NB. Multiple Responses. Each respondent was permitted to give more than one answer.

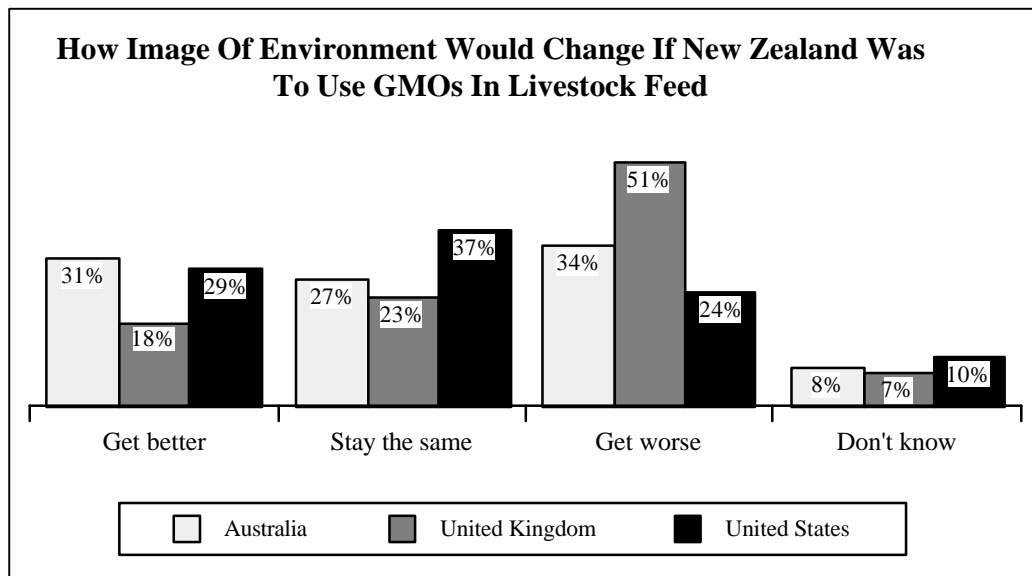
- Positive comments made regarding the use of GMOs in pest control, included that there would be less pests, pests should be controlled, and that it would help the environment.
- A large number of Australian respondents were in favour of the use of GMOs as per this scenario, as such measures would eradicate pests (9%), or there would be less pests (8%).
- The most common negative comments were that the use of GMOs to control pests would interfere with nature and that it could have side effects. Respondents also stated that the consequences of using GMOs were unknown, or that they simply did not approve of GM technology.
- A large number of respondents in the United Kingdom (17%) were concerned that the use of GMOs would interfere with nature.
- Conversely, American respondents (13%) were worried that there may be side effects when using GMOs.

### 3. Image Change - GMOs in Livestock Feed

*“Suppose New Zealand was one of two or three countries to use a strain of rye grass modified by genetic technology. The gene of the grass would be changed to increase its food value. Farmers would plant fields of the modified rye grass to feed their livestock.”*

*“Would your image of that country’s environment get better, stay the same, or get worse?”*

If better or worse: *“Can you say why?”*



NB. Percentages may not add to 100 due to rounding.

- When confronted with a scenario in which rye grass was genetically modified in order to feed livestock, the majority of respondents said that their image of the New Zealand environment would worsen.
- This was particularly the case in the United Kingdom, where over half (51%) of respondents said New Zealand’s environmental image would get worse. In comparison, 34% of Australian, and 24% of American respondents felt this way.
- The majority (37%) of respondents in the United States felt that their image of New Zealand would remain unchanged.
- Around one quarter of all respondents, felt that their image of the environment would improve, ranging from 18% of United Kingdom respondents to 31% of Australians.

### Comments Regarding the Use of GMOs in Livestock Feed

	Australia %	United Kingdom %	United States %
<b>Positive Comments (Top Five Mentions)</b>			
It would be an improvement	7	8	11
Produce more feed for animals	7	5	9
Better quality food for livestock	9	3	6
More animals per paddock	4	2	7
Better grass so better animals	6	1	6
<b>Negative Comments (Top Five Mentions)</b>			
Could be dangerous	7	15	8
Interfering with nature	3	17	8
Don't approve of GM technology	7	14	6
Don't know the consequences	6	13	6
Could get into the food chain	7	8	6

NB. Multiple Responses. Each respondent was permitted to give more than one answer.

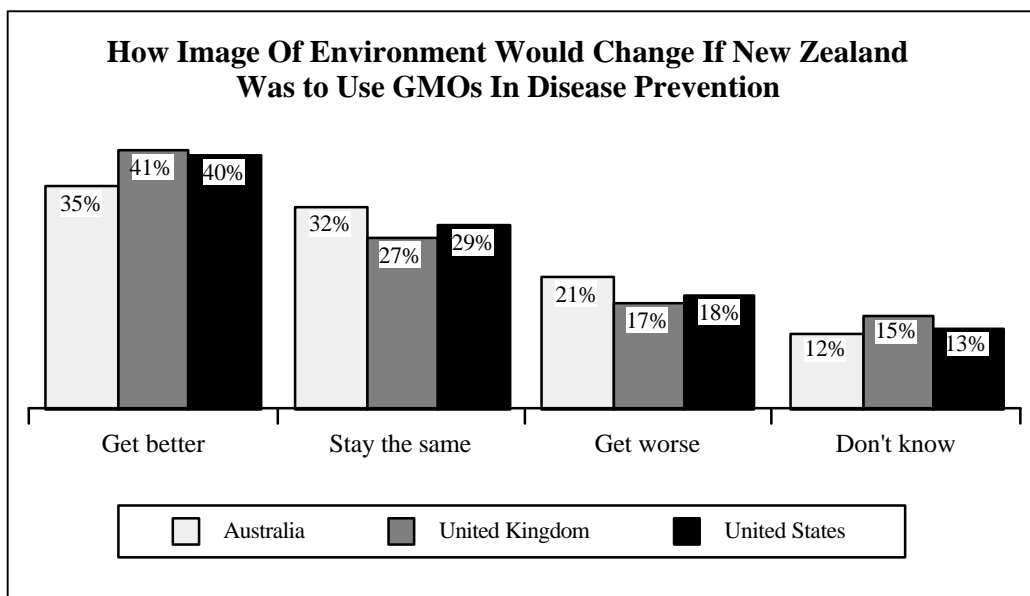
- Negative comments regarding this scenario included that it could be dangerous, it interfered with nature and that the consequences were unknown. Some respondents were also concerned that GMOs could get into the food chain. As in the previous scenario, there were a number of people who did not approve of GM technology.
- As shown in the preceding graph, respondents from the United Kingdom were most concerned about the use of genetically modified rye grass. 17% of respondents stated that this interfered with nature, while 15% said that it could be dangerous.
- Positive comments tended to centre on genetically modified rye grass producing more, or better quality feed, and the knock-on benefits to the quantity and quality of livestock.
- American respondents placed greater importance on the quantity of feed (9%), while 9% of Australians said that better quality feed would result from the use of GMOs.

#### 4. Image Change - GMOs in Disease Prevention

*“Suppose New Zealand was one of two or three countries to use a virus whose genes have been changed in such a way that protects a person against a contagious disease such as Hepatitis or Meningitis. The modified virus, once in the person’s bloodstream, would remain there, attacking the disease virus if or when the person got infected.”*

*“Would your image of that country’s environment get better, stay the same, or get worse?”*

If better or worse: *“Can you say why?”*



NB. Percentages may not add to 100 due to rounding.

- Respondents were, on the whole, more tolerant in a scenario where genetically modified viruses were used to protect against disease. Over one third of all respondents stated that their image of the New Zealand environment would improve under this scenario. Acceptance was highest in the United Kingdom (41%).
- Around 20% of respondents felt their view of the environment would worsen, peaking at 21% in Australia.
- Approximately 30% of respondents said there would be no change in image, ranging from 27% in the United Kingdom to 32% in Australia.

**Comments Regarding the Use of GMOs in Disease Prevention**

	Australia %	United Kingdom %	United States %
<b>Positive Comments (Top Five Mentions)</b>			
Would be good	7	18	13
Good for health reasons	9	11	17
Control diseases	12	9	12
Prevent diseases	3	11	8
Reduce diseases	5	5	4
<b>Negative Comments (Top Four Mentions)</b>			
Is dangerous/too much risk involved	8	9	9
Don't approve of GM technology	5	3	6
No idea of outcome	3	5	4
Nervous about using in humans	3	3	4

NB. Multiple Responses. Each respondent was permitted to give more than one answer.

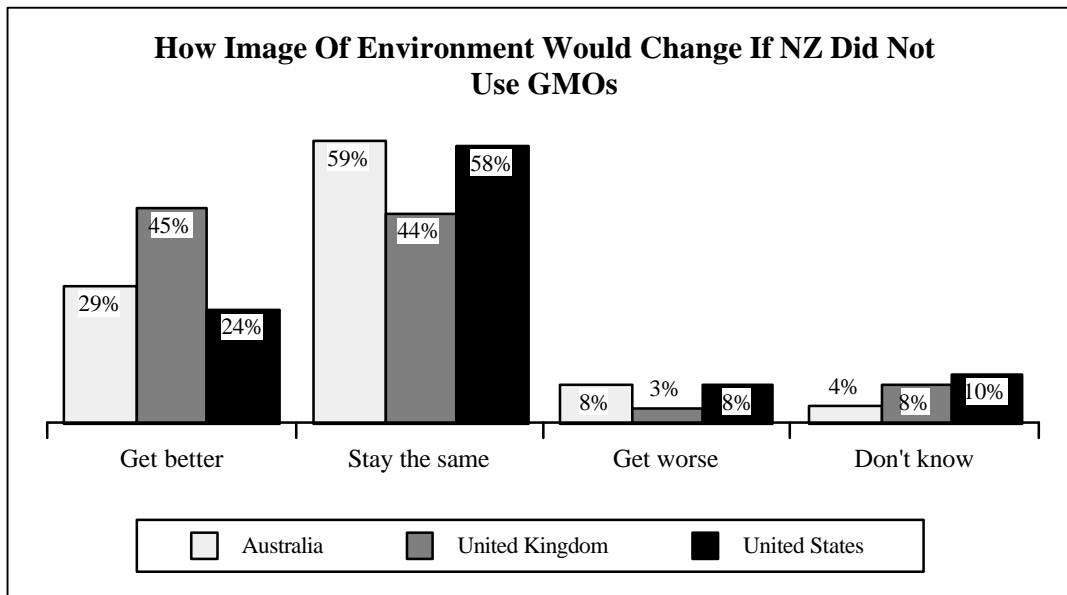
- Positive comments regarding the use of GMOs for disease prevention centred on the reduction, prevention and control of disease. This was especially so in the United States, where 17% of all respondents said their image would improve, as such a use would be good for health reasons.
- The main comment made in opposition to this use of GMOs, was that it was too dangerous. This view was expressed by 8% of Australian, and 9% of English and American respondents.
- Other negative comments included that the outcome was unknown, and that the respondent was nervous about the use of GMOs in humans. Some respondents expressed once again that they did not approve of GM technology.

## 5. Image Change - No Use of GMOs

*“Suppose New Zealand was one of two or three countries **not to use** genetically modified organisms in production, **nor** release GM organisms into the environment.”*

*“Would your image of that country’s environment get better, stay the same or get worse?”*

If better or worse: *“Can you say why?”*



NB. Percentages may not add to 100 due to rounding.

- Respondents were far more positive, when considering that New Zealand not use GMOs.
- Almost half (45%) of United Kingdom respondents said their image of New Zealand’s environment would improve should it not use GMOs.
- The majority of Australian (59%) and American (58%) respondents said that their image of the New Zealand environment would stay the same if GMOs were not used.
- Only a small number said that their view would get worse, peaking at 8% in Australia and the United States.

**Comments Regarding New Zealand not Using GMOs**

	Australia %	United Kingdom %	United States %
<b>Positive Comments (Top Four Mentions)</b>			
Don't approve of GM technology	8	17	8
It is natural	9	12	11
It is healthier/safer without GM	6	10	4
Reinforces positive image of New Zealand	4	6	4
<b>Negative Comments (Top Three Mentions)</b>			
Health reasons	5	1	1
Approve of GM technology	1	2	4
Progressive	2	-	4

NB. Multiple Responses. Each respondent was permitted to give more than one answer.

- One of the primary reasons as to why respondents looked favourably on New Zealand not using GMOs, was that respondents did not approve of GM technology. This was most evident in the United Kingdom, where this was stated by 17% of respondents.
- Respondents also felt that New Zealand being GMO-free was more natural, and healthier.
- A smaller number of respondents felt that New Zealand being free of GMOs would reinforce New Zealand's positive image.
- Negative comments included that GM technology was good for health reasons in terms of disease prevention, the respondent approved of GM technology, and GM was a progressive technology.

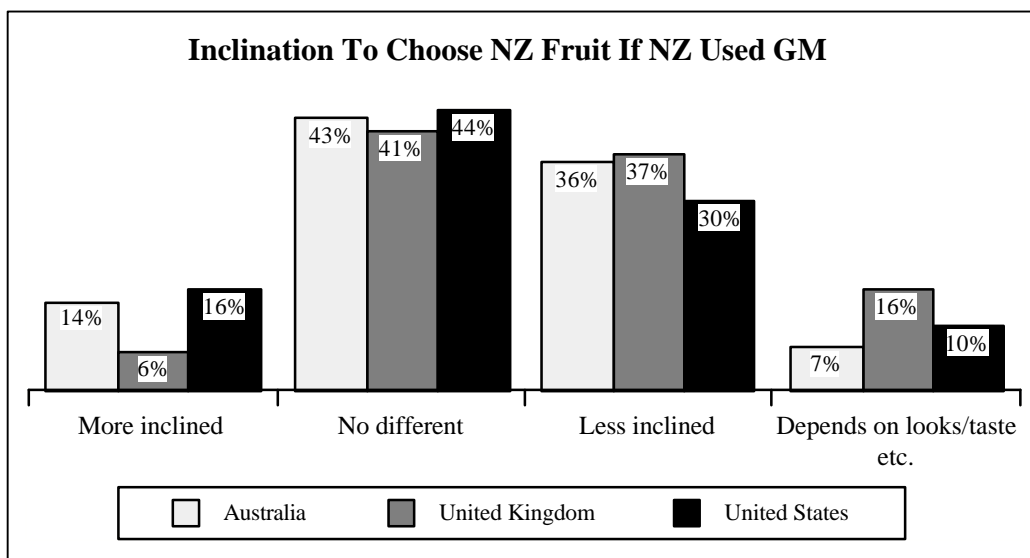
## 6. Purchase Change - Purchasing Fruit

*“Say you were at the shops, buying fruit. Some of the fruit was from New Zealand and some from countries that did not use genetic modification. Knowing that New Zealand used genetic modification technology, although not with the fruit that interested you, would you feel...?”*

*“More inclined to choose New Zealand fruit?”*

*“Less inclined to choose New Zealand fruit?”*

*“Or no different than before?”*



NB. Percentages may not add to 100 due to rounding.

- The majority of respondents (between 41% and 44%) said they would feel no different to before, if New Zealand used GM technology, although not with the fruit that interested them.
- Around one third would be less inclined to purchase New Zealand fruit, should it use GM technology. English (37%) and Australian (36%) respondents were less tolerant to the use of GM in this scenario, as compared with respondents in the United States (30%).

**Inclination to Purchase New Zealand Fruit under GM Scenario**

	Australia	United Kingdom	United States
	%	%	%
<b>More Inclined...</b>	<b>14</b>	<b>6</b>	<b>16</b>
Would buy with no premium	3	1	2
Would buy with 5 cent premium	1	1	1
Would buy with 10 cent premium	6	4	8
Depends on looks/taste etc	4	-	5
<b>Less Inclined, but...</b>	<b>36</b>	<b>37</b>	<b>30</b>
Would buy with 5 cent discount	2	3	3
Would buy with 10 cent discount	1	-	2
Would buy with 10+ cent discount	2	2	1
Wouldn't buy with any discount	27	30	20
Don't know	2	-	1
Depends on looks/taste etc	3	3	3

NB. Percentages may not add to 100 due to rounding

- The overwhelming response from those that would be less inclined to buy New Zealand fruit in the given scenario, was that they wouldn't buy the fruit, even if a discount was given. This was highest in the United Kingdom, where 30% of all respondents said that they would not purchase this fruit at any cost.
- The number of respondents more inclined to buy New Zealand fruit was relatively low, ranging from 6% in the United Kingdom to 16% in the United States.
- Of those stating that they would be more inclined to buy such fruit, many said that they would buy this with a 10 cent premium.

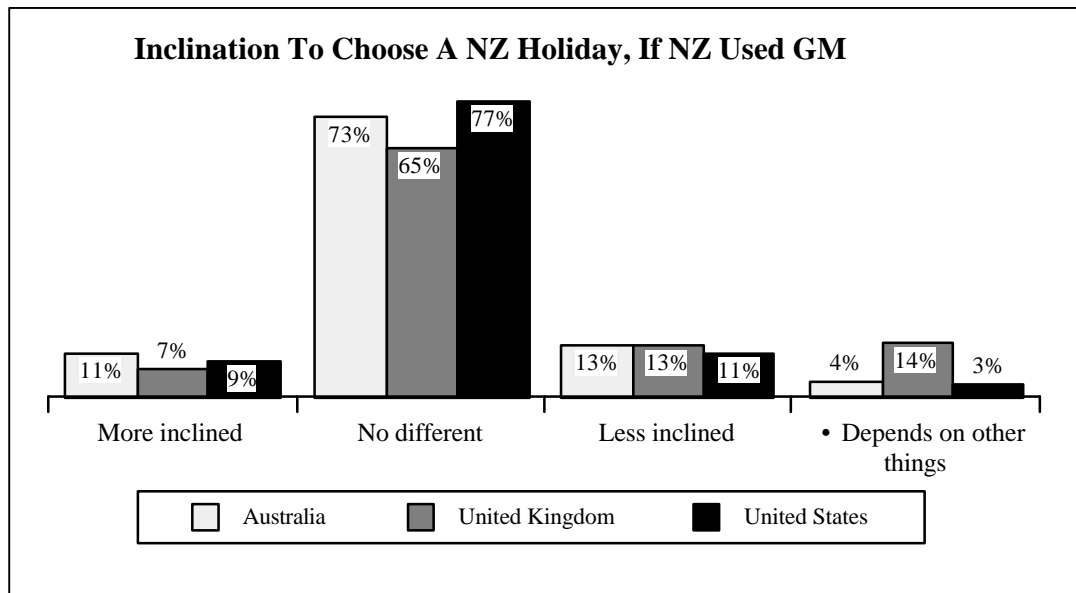
## 7. Purchase Change - Choosing a Holiday

*“Now please think of taking a 10 day holiday in another country, and also that New Zealand was one of several countries that you found equally appealing. On being told that New Zealand used genetic modification technology in the ways we covered, would you feel...?”*

*“More inclined to choose New Zealand for a holiday?”*

*“Less inclined to choose New Zealand for a holiday?”*

*“Or would make no difference to you?”*



NB. Percentages may not add to 100 due to rounding.

- The majority of respondents said they would feel no different about choosing a New Zealand holiday, should New Zealand use GM technology. This ranged from 65% in the United Kingdom to 77% in the United States.
- The number of respondents stating that they would be less inclined to choose a New Zealand holiday, was relatively low, peaking at 13% (Australia and the United Kingdom).
- Similarly, there were only a small number of respondents who felt more inclined to choose New Zealand holiday under the given scenario, peaking at 11% (Australia).

**Inclination to Choose a New Zealand Holiday under GM Scenario**

	Australia %	United Kingdom %	United States %
<b>More Inclined, but would be equally, or more appealing than other countries if...</b>	<b>11</b>	<b>7</b>	<b>9</b>
No premium	1	1	1
5% dearer	1	-	1
10% dearer	5	3	5
Depends on other things	5	3	1
<b>Less Inclined, but would be equally, or more appealing than other countries if...</b>	<b>13</b>	<b>13</b>	<b>11</b>
5% discount	1	2	1
10% discount	1	-	1
10+% cent discount	1	2	2
Wouldn't choose with any discount	9	6	5
Don't know	-	1	-
Depends on other things	2	3	1

NB. Percentages may not add to 100 due to rounding

- Of those less inclined to purchase a New Zealand holiday under the given scenario, the majority stated that they would not choose New Zealand even if a discount were given. This accounted for 9% of all respondents in Australia, 6% of those from the United Kingdom, and 5% of those in the United States.
- Around one in twenty (5%) respondents in Australia and the United States said that New Zealand would be an equally appealing holiday destination, even if it was over 10% dearer than a similar holiday in a country that did not use GM technology.

## 8. Purchase Change - Purchasing Dairy Products

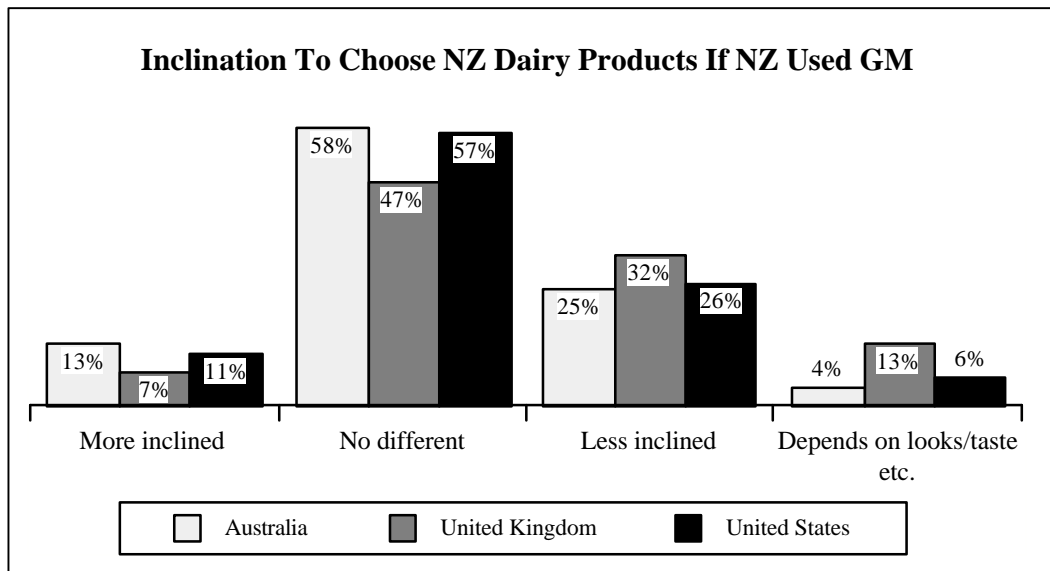
*“Suppose that you were at the shops buying a dairy product like cheese, a milk drink, or butter. The store had dairy products from New Zealand as well as from other countries that did not use genetic modification in the ways we covered earlier.”*

*“Knowing that New Zealand used genetic modification, though not in the dairy product you were buying, would you feel...”*

*“More inclined to buy the New Zealand dairy product?”*

*“Less inclined to buy the New Zealand dairy product?”*

*“Or would make no difference to you?”*



NB. Percentages may not add to 100 due to rounding.

- The majority of respondents were indifferent with regards to purchasing a New Zealand dairy product, which had not been genetically modified itself, but which came from a country that used GM in other ways. This was highest in Australia (58%) and the United States (57%).
- United Kingdom respondents were the least inclined (32%) to buy such a dairy product. This compares to 25% of Australian and 26% of United States respondents, who said they would be less inclined to purchase the product.
- Few respondents were more inclined to purchase the New Zealand dairy product. This ranged from 7% in the United Kingdom to 13% in Australia.

**Inclination to Purchase New Zealand Dairy Products under GM Scenario**

	Australia	United Kingdom	United States
	%	%	%
<b>More Inclined...</b>	<b>13</b>	<b>7</b>	<b>11</b>
Would buy with no premium	1	1	3
Would buy with 5 cent premium	1	1	1
Would buy with 10 cent premium	11	3	7
Depends on looks/taste etc	1	3	1
<b>Less Inclined, but...</b>	<b>25</b>	<b>32</b>	<b>26</b>
Would buy with 5 cent discount	1	1	1
Would buy with 10 cent discount	1	-	2
Would buy with 10+ cent discount	1	1	-
Wouldn't buy with any discount	21	29	21
Don't know	1	-	1
Depends on looks/taste etc	1	1	1

NB. Percentages may not add to 100 due to rounding

- Once again, a very large number of respondents, said that they would not purchase the product even if it came at a discount. This was particularly the case in the United Kingdom, where 29% of all respondents stated that they would not purchase the dairy product at any price. Similarly, 21% of respondents in Australia and the United States said that they would not purchase the product.
- A much smaller number of respondents were more inclined to buy the product, with a number of these prepared to purchase with a 10 cent premium.

## 9. Purchase Change - No Use of GMOs

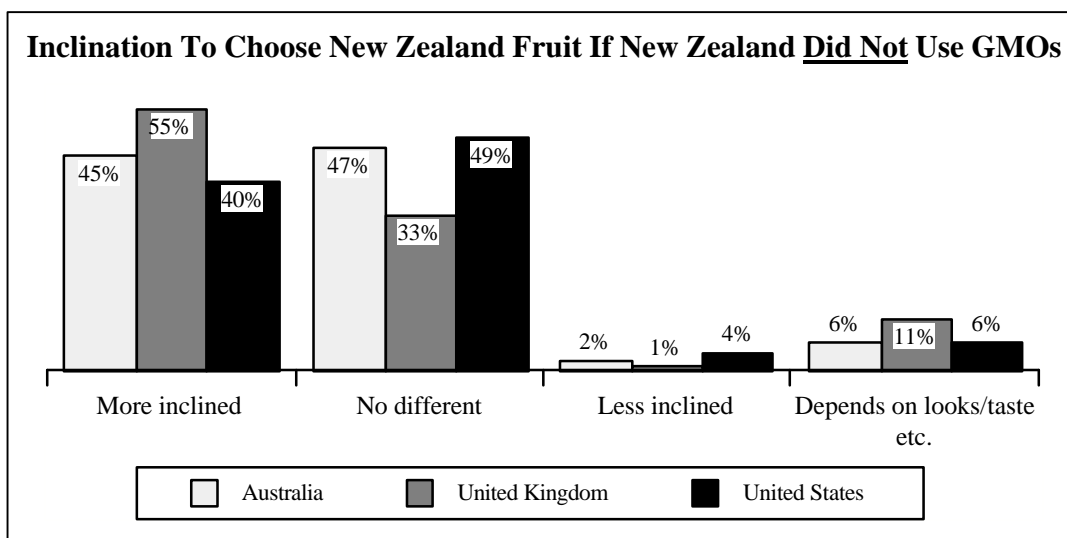
“Now suppose New Zealand were **not to use** genetically modified organisms in production, **nor** release GM organisms into the environment. Please answer the next questions on the basis that New Zealand became one of the two or three countries to **not use** genetic modification.”

“Say you were at the shops, buying fruit – some of the fruit was from New Zealand, and some from countries that did use genetic modification, the fruit itself was not genetically modified. Given that New Zealand did not use genetic modification technology, would you feel...”

“More inclined to choose New Zealand fruit?”

“Less inclined to choose New Zealand fruit?”

“Or no different than before?”



NB. Percentages may not add to 100 due to rounding.

- Under a scenario in which New Zealand did not use GMOs, the majority of respondents were either more inclined to purchase New Zealand fruit, or felt no different than before.
- Not using GMOs had the greatest effect on United Kingdom respondents, with over half (55%) stating that they would be more inclined to buy New Zealand fruit.
- The majority of Australian (47%) and United States (49%) respondents were indifferent, should New Zealand not use GMOs.
- Only a very small number (between 1% and 4%) of respondents said that they would be less inclined to buy the fruit, under the non-GMO scenario.

**Inclination to Purchase New Zealand Fruit With Associated Premiums and Discounts Under Non-GMO Scenario**

	Australia	United Kingdom	United States
	%	%	%
<b>More Inclined...</b>	<b>45</b>	<b>55</b>	<b>40</b>
Would buy with no premium	2	3	4
Would buy with 5 cent premium	3	2	3
Would buy with 10 cent premium	-	-	-
Would buy with 10+ cent premium	29	27	22
Depends on looks/taste etc	3	12	5
Don't know	9	12	8
<b>Less Inclined, but...</b>	<b>2</b>	<b>1</b>	<b>4</b>
Would buy with 5 cent discount	-	1	1
Would buy with 10 cent discount	1	-	-
Wouldn't buy with any discount	1	-	1
Depends on looks/taste etc	-	-	1

NB. Percentages may not add to 100 due to rounding

- The majority of those more inclined, said that should New Zealand not use GMOs, they would be prepared to pay a premium of ten cents or more. This was the case for 29% of respondents in Australia, 27% in the United Kingdom, and 22% in the United States.

\* \* \* \* \*

**APPENDIX**