TITLE

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ABSTRACT

This paper reviews the state of the Pick Your Own sector in Britain, and strategies used by farmers to cope with the changing socio economic environment.
Causes for decline of the PYO suggest a misunderstanding of their market by the farmers. Evidence suggests that customers consider a trip to a PYO as a leisure experience, and hence should be served as 'tourists', whilst many farmers consider it a product-based sale, and fail to satisfy the augmented product needs of the visitors or to recoup their costs.
The study is multimethod based on three data sources: an emailed survey of all PYO farms listed in the PickYourOwnFarms.org.uk website, which covers the whole of the United Kingdom; an on-site customer feedback survey from a large Pick Your Own (PYO) on a diversified farm in Gloucestershire; and three structured face to face interviews with selected PYO farmers, to obtain rich qualitative data on the strategies used to combat the challenges, and their perceived outcomes.
Surviving PYO farmers are applying a range of solutions to the challenges they face, these are identified.

KEY WORDS: Pick Your Own, rural entrepreneurship, diversification, rural tourism.

Introduction

Pick Your Own (PYO) farms hold nostalgic memories for many of us. In the 1980's there were thousands of them in the UK, but now there are only a few hundred (Sukhadwala 2014). This paper will seek to explain the reasons behind the decline in PYO numbers, and discover what strategies remaining farms are using to survive.

Literature review

Leffew and Ernst (2014) define PYO as "a farm where customers may go to pick, cut or choose their own product out of the field." In America they are called U pick, cut-your-own or choose-your-own.

On the other hand Ernst and Woods 2014 decided that PYO "occurs when farmers invite the public onto the farm to harvest their own food".

Sukhadwala **(**2014) defines them as ''these working farms, where you pick fresh fruit and veg and then pay at the farm shop.''

PYO farms are a farm diversifications that do not fall into a discrete Defra category, see below:

Table 1. Defra classification of farm diversifications

	No. of farms	% of farms	Total farm income for these farms (£m)	Income of diversified enterprise (£m)	Average enterprise income (£/farm)
Farm Business income (incl. diversification)	58,400		2,520		
Farms which engage in:					
Diversified enterprises (all kinds)	33,800	58%	1,800	490	14,500
Letting buildings for non-farming use	22,800	39%	1,270	350	15,500
Processing/retailing of farm produce	5,800	10%	170	60	9,900
Sport and recreation	7,300	13%	320	30	3,700
Tourist accommodation and catering	3,400	6%	180	10	4,400
Other diversified activities	11,700	20%	870	40	3,200

(Source: Farm Business Survey 2013-14 Defra)

Hence it is impossible to find out about the numbers or performance of these businesses using data provided by Defra. Also using the Standard Industrial classifications used by the government for tourism related industries we would have to put PYO into the very broad group of ''Food and beverage … '' or possibly "Sports activities … and recreation activities", depending on our views on the core product of PYO.

What exactly are PYO customers buying? Is the fruit the core product, or is it the experience of picking? If we believe that PYO's are providing a recreational activity, they can be included within the rural tourism classification. Rural tourism has grown more quickly than the rest of the economy from 2008 -2010. The recession resulted in the growth of Staycations, as British residents decided to take holidays in the UK rather than going overseas. ONS 2015.

Aims of this study

An exploration of the reasons for the fall in the numbers of PYO farms since the 1980's
To review the core product of PYO: fruit retailing or family day out?
To identify the mitigation strategies taken by surviving PYO farms.

The decline

Lefort (2015) reported that the numbers of these farms has declined markedly since the 1980's from more than 4000, to around 600 in 2015.
Jemima Lewis of the Telegraph writes:
''The closest I ever got to nature during my London childhood was harvesting fruit for my mother's jam. Those memories – …. the smell of warm earth and straw, and the startling sweetness of contraband berries whipped straight from plant to mouth – still linger on the palate. …... ''.
This quote, in praise of the PYO farm also contains the seeds of their decline, as eating and not paying for fruit is shown to be a major threat to their financial sustaionability.
In their guide to PYO farmers in America, Leffew and Ernst 2014 put forwards several challenges facing PYO farmers, which if not addressed could result in the closure of the PYO business - factors like weather, liability and risk assessment, pricing, promotion, waste and theft.

Diversification

Under the new Common Agricultural Policy, there is still encouragement for farmers to develop multi-functionality of their land, and hence multi-income streams. Commercial pressures caused by economic structural changes, changes in consumer spending habits, international competition, weather uncertainty, specialisation, price pressures and market instability all act as push factors to diversify incomes.
Many writers attribute the growth of 'agritourism' to the need for alternative income streams, a secondary business on the farm and based on agricultural activities. (Busby & Rendle, 2000; Roberts & Hall, 2001; Nilsson, 2002; Sharpley & Vass, 2006; Philips et al., 2009; Tew & Barbieri, 2012). PYO is such a diversification – on farm but non-farm and involving the

welcoming of 'visitors' onto the farm, for a retail or a recreational activity. As agritourism has grown, the agritourist has had a greater choice of activities, and the nature of agritourists has developed over time, in line with changes in mainstream tourists. Their age, cultural, educational and occupational profiles have not remained static. (Torkildsen 2010). As income from farming has varied and in some sectors is not profitable without subsidies, (Defra 2014), agritourism is more often an alternative activity than a complementary activity to agriculture (Forbord et al, 2012) as it contributes more to the farming household income than mainstream agricultural activity. (NFU 2016)

Threats

Due to the lack of any PYO category in Defra's diversification groupings there is a lack of literature relating to PYO's in Britain, however in America there is more written on the subject. Reviewing the works of Ernst and Woods (2014) and Leffew and Ernst (2014), several threats to PYO farms emerge.

Waste. Leffew (2014) quotes Bill Forgie of Forgie's Fruit Farm, Lewisburg, fora person that is easily stressed with customers in the orchard, pick-your own probably wouldn't be a good option. Customers may not treat your trees with the same care you would, and they waste much more product.''

They also state that there is increased wastage of fruit, due to careless picking and children playing amongst the fruit. Lefort (2014) quotes a PYO farmer bemoaning the fact that pickers sometime leave half full baskets of fruit in the field after eating their fill. Additionally visitors will be deterred by the weather and fruit ready for picking will become over ripe if poor weather puts off pickers, who are looking for a day trip out and are unlikely to venture out in poor weather. In the UK a series of poor summers and increasingly unpredictable weather patterns has had this effect.

Theft. When Lewis (2014) wrote of ''the startling sweetness of contraband berries whipped straight from plant to mouth – still linger on the palate'', she did not consider the losses to PYO of pickers eating the fruit. There is a dissonance between the views of the pickers and the farm owners on this issue. In 2010 Lefort wrote that PYO farms are experiencing an increase in thefts, and this has caused some farms to go out of business, and others to go to the expense of paying for security personnel to deter pickers eating the fruit before paying. She writes of pickers enjoying a ''free buffet'' and cherry rustlers sneaking through fences and throwing fruit over the hedge to avoid paying. One PYO farmer comments that the situation seems to be worsening, and there is a greater lack of understanding of the concept of PYO. This certainly seems to be a major threat to the future survival of PYO farms, not only from the point of view of business profits, but also from the irritation and frustration it causes the farm owners. This can be linked to Doxey's irridex (1975), as the views expressed in Lefort's article demonstrate that some PYO owners are in the annoyance stage, and those who have left the industry could have done so because they had entered the antagonism stage.

Mark Spight, the manager of Hacker's Fruit Farm in Dry Drayton, Cambridgeshire, closed his PYO business in 2015 after losing around £10,000 to "greedy gorgers". He claimed last year to have seen a family turn up with a bowl of cream to eat with strawberries that had not been paid for.

Public liability. The price of public liability insurance can be high and some PYO farms find it prohibitive. Lewis (2009) quotes Boddingtons berries which has closed for this reason. Following an accident on their premises and having to pay compensation, their insurance premiums rose significantly and they were required to install expensive safety measures. As litigation increases (Dept of Work and Pensions 2015) all PYO's are gambling that they will not have a similar experience.

Weather. Wall and Badke (1994) indicated that 81% of tourism organisations identified weather as a major determinant of tourism. Due to the reliance on weather for sales, few fruit and vegetable producers rely solely on PYO operations to sell their produce (Benivia, 2015).

Location. Bosworth (2012) noted that rural businesses are particularly vulnerable to exogenous challenges. The more rural their location, the greater this is. The population in surrounding areas for customers, and as a pool of labour, together with ease of access are all important factors related to location of a PYO operation. Although Carpio et al (2008) found that PYO customers travelled 20-25 miles to reach the farm, so the local population does not seem to be the core customer base in the USA for PYO.

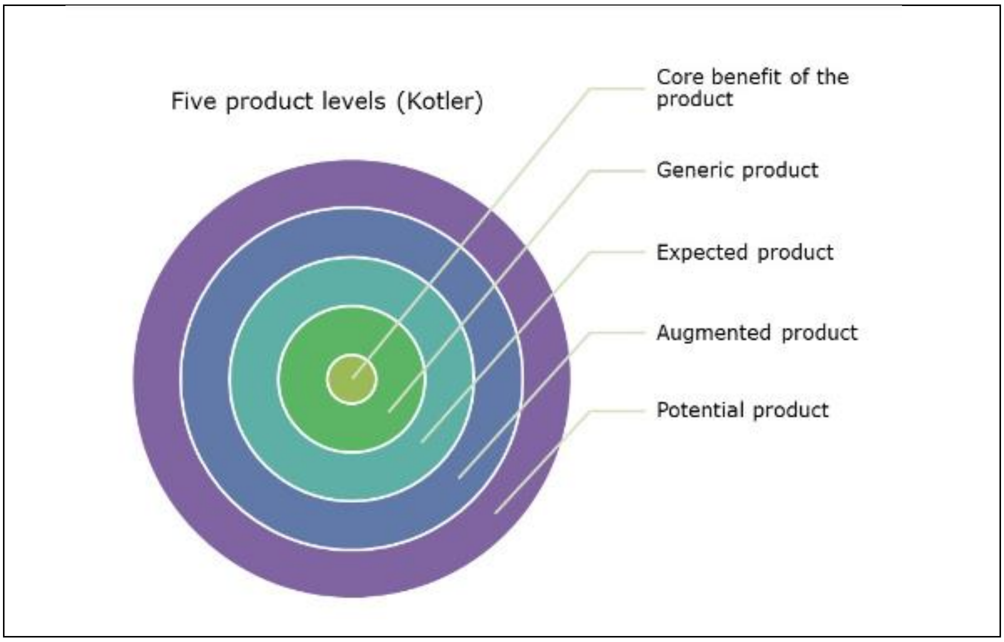
Food quality. As more consumers live in cities, Sukhadwala 2014, observed that ''the modern Londoner.. likes to know where their food comes from'', and is concerned about food miles. These consumers seek out local, seasonal produce believing it to be ''packed with higher nutritional value''. She considers that PYO gives the consumer a sense of connection with their food. Customers are searching for interaction with nature, and welcome the seasonality of PYO (Halfacree 2009)

Understanding the market. Are customers visiting the PYO farm to buy fruit or to have a rural experience connecting them to their food and nature? Slee (2005) suggests that the British countryside is less of a countryside of production now, and that consumers desire to consume the experience of being in the countryside instead. This, he asserts, has swung the creation of employment and wealth towards diversified farms and multifunctional economic activity in rural economies.

Slee (2005) also points to the change in the social structure of rural economies, due to the influx of new entrants escaping the cities to live or holiday, which could impact on the local demand for PYO fruit, due to the gentrification of the countryside. There are more residents who have moved to the countryside seeking the idyllic rural life style making them likely to engage in PYO.

A 2008 study of PYO visitors in the USA found that they are motivated by freshness, quality, price and the experience of visiting the farm; they are above average earners and have education levels higher than the population average. They typically average around 50 years in age and visit the farm in groups of two or more, frequently bringing children (Carpio 2008).

Chart 1. Source Kotler 2013



If farmers are to be successful in their PYO ventures they need to understand what it is that the consumers view as the core benefit of their trip to the farm. Is it the fruit or is it a recreational day out with the family? The marketing and product portfolio will have to alter to reflect the core exchange.

PYO does not appear in the list of rural tourism products in the DCMS Strategic Action Plan for Tourism 2010-20, but taking the answers of the USA PYO visitors it would seem that the generic product is not only fresh fruit, but 'visiting the farm' too. The views of the visitors will shape the offering of PYO farmers.

A review of websites listed in the PYO website (www.pickyourownfarms.org.uk) showed that many farms offer several recreational activities alongside fruit picking, such as maize mazes, playgrounds for children, Easter egg hunts, feeding lambs, garden centres, scenic walks, farm trails, picnic areas, tea rooms, easy access for disabled, toilets, disabled facilities, caravan and campsites, fishing lakes, nature trails….. all of which suggest that some farm owners have recognised that their customers are visiting for a day out, not just to buy fruit. If we then consider the PYO visitor as a tourist rather than a shopper we can apply some of the better known tourist typologies to them.

Referring to Plog's 1974 typologies, tourists can be Allocentric or Psychocentric. Allocentrics wish to blend into the new surroundings and be accepted by the host population, whereas Psychocentric's prefer to travel in their own 'environmental bubble' in bigger groups. These visitors are happier in familiar surroundings and do not seek to learn about their host population or local codes of behaviour or conduct. They are the same as Cohen (1979) described in his Mass Tourism typology, they have little or no contact with the locals. If the visitors to PYO farms tend towards psychocentric mass tourists described by Plog and Cohen in their ground breaking theories, this will have an impact on the farmers hosting the PYO. They may experience the stages described in Doxeys irridex, even experiencing ''Annoyance'' or ' Antagonism'' should the behaviour of the visitors become difficult for them to cope with, or the profits from the venture are seen to no longer compensate for the frustrating trading environment.

A further potential cause of friction between hosts and guests could be the clash of cultures. Zhang et al 2006 wrote of the community attitudes towards urban visitors, where the host population was rural in nature. Hosts were categorised as 'haters', 'lovers' or somewhere in between, where 'haters' outnumbered 'lovers', tourists were treated in an unfriendly way. Zhang attempted to review the effect of ethnicity, rural-urban and personality on host attitudes to tourists. Other variables such as age, gender, ethnicity, proximity to resort, length of residency and more were also considered. It is also possible to turn this theory around and suggest that the different characteristics of the tourists will have an impact on their conduct whilst on site – at the PYO farm.

As Kotler (2013) indicated when extending the 4Ps to the 7Ps for hospitality and tourism industries,– the personnel involved in a tourism experience are critical to the tourists enjoyment. Hence we have to consider the role of the farmer as a host to the PYO pickers, when they arrive on the farm. McElwee has written extensively about the skills and aptitudes of the farming population as entrepreneurs. He explains that the contexts of conventional farming and business diversification call for clearly different entrepreneurial skills, some of which are more amenable to teaching than others.

In studies done to better understand the economic, social and cultural factors hindering or stimulating the development of entrepreneurial skills of farmers, McElwee found that ''The entrepreneurial skills of the farmer will vary according to the particular personal, social and political interests of the respondents and how they perceived the realities of farming.''

Methodology:

This study is a multi-method piece of research using primary and secondary data. An inductive strategy was adopted using survey results to observe the reasons behind the falling numbers of PYO farms and strategies used by surviving farmers, hence, enabling generalisations to be drawn on the subject.

Four pieces of research were undertaken:

1. A Survey of PYO owners was completed, which involved sending a questionnaire to all the PYO farms listed on the website who had given an e mail address, this was 166 of the 257 on the website for PYO farms. 53 responded (n =53). This represents a response rate of 32%. If the figures from Lefort in 2010 are accurate then the entire PYO population of the UK is now less than 600.
2. Owners of large PYO's in Herefordshire (farm A) , Gloucestershire (farm B) and Oxfordshire (farm C) were interviewed using semi-structured interview techniques to give greater depth to the findings, and to explore more fully the survival strategies being used and problems encountered. See appendix 1.
3. In order to provide triangulation, and a better understanding of the motivations of PYO visitors, a questionnaire was circulated to customers at the researchers PYO farm in Herefordshire in the summer of 2015, when visitor numbers were at their highest.
4. The websites of ten PYO farms were analysed, chosen by random sampling from the PYO website, in order to evaluate their marketing and product portfolio.

The findings

Reasons for the decline?

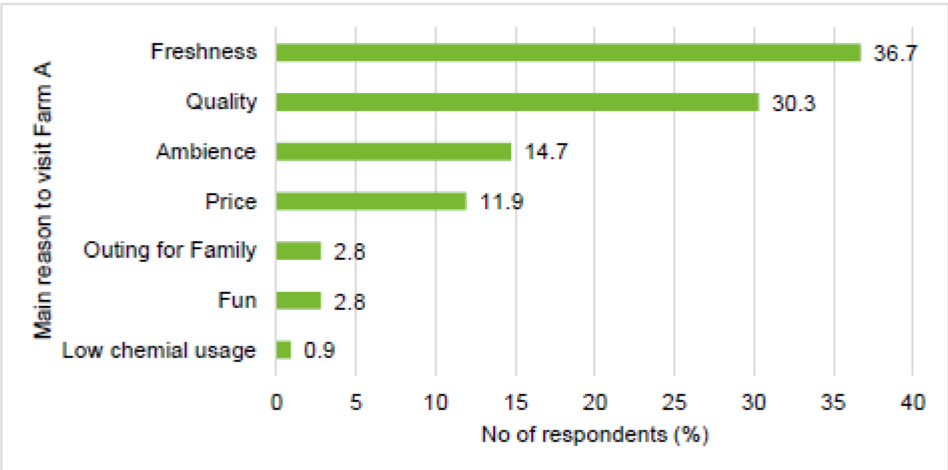
Responses from three PYO's still on the PYO website who had ceased doing PYO, indicated that supermarket were responsible for reducing the numbers of customers to unsustainable levels. Firstly by stocking seasonal soft fruit and vegetables all year round, by sourcing from overseas. And secondly by charging lower prices. These three farms had not been able, or maybe willing, to transform into a 'farm experience', so had stopped offering PYO.

One of these respondents wrote: ''there was a change in requirement – families were looking for 'entertainment' as part of their visit – an animal petting area/coffee shop/children's area.'' Another of the farms that had closed, wrote that they were ''not situated close enough to a large population to go down the family day out route'' and that the customers had changed to families who picked small quantities and wasted more than other picker groups.
Hence it seems that the PYO market changed over time, and those that adapted to the new trading conditions have continued, and have coped with other supply side challenges too.

What is the core product?

PYO farmers were asked what they thought the core product was that they were selling. 30% said they believed it to be the whole farm experience, while 50% believed it to be the fruit/vegetables and their freshness and traceability, and 20% thought visitors came to the farm for the shop and cafe. PYO owners have different views of their market, and it does seem that the survivors are the ones who have augmented the core fruit product with activities and recreational offerings, especially for children.
A review of 10 individual websites, selected from the PYO website, showed that all 10 were offering a range of augmentations to the core product. Activities such as children's playgrounds, cafes, farm shops, farm tours, campsites, glamping, fishing, and all sorts of seasonal activities are advertised on the websites.
Confusingly the survey of 53 PYO visitors to farm A found that 50% came for the fruit and only 37% for a whole farm experience. 67% of them came to the PYO for **freshness** and **quality** produce. This reveals a conflict with the views of the owners. Could it be that there are two market segments using PYO's now?

Chart 2: Results from Survey 1, the main reason for visiting the PYO.



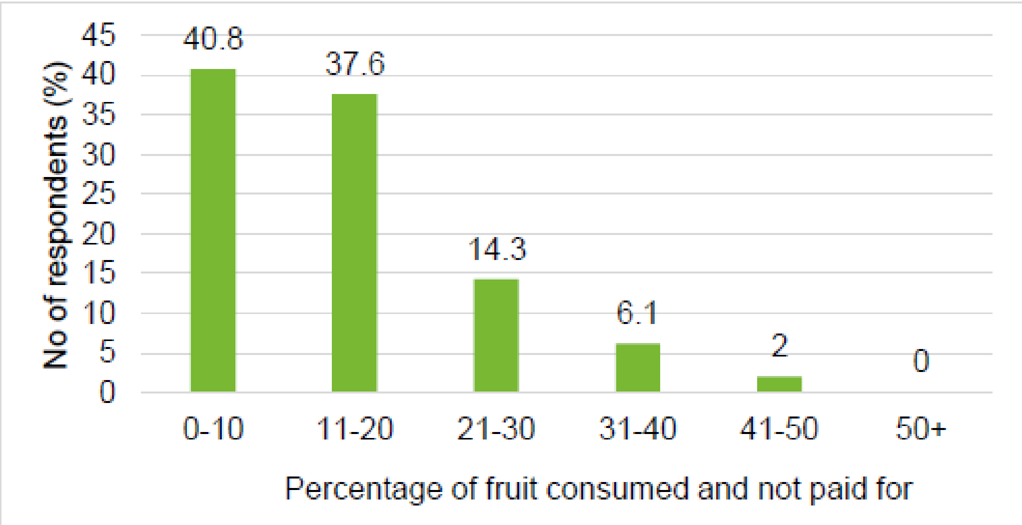
(Source: Authors own, 2016)

Threats

On the subject of threats to PYO farms, the survey yielded the following results;

Eating without paying/theft, emerged as a major problem in the soft fruit PYO's. See estimated results below.

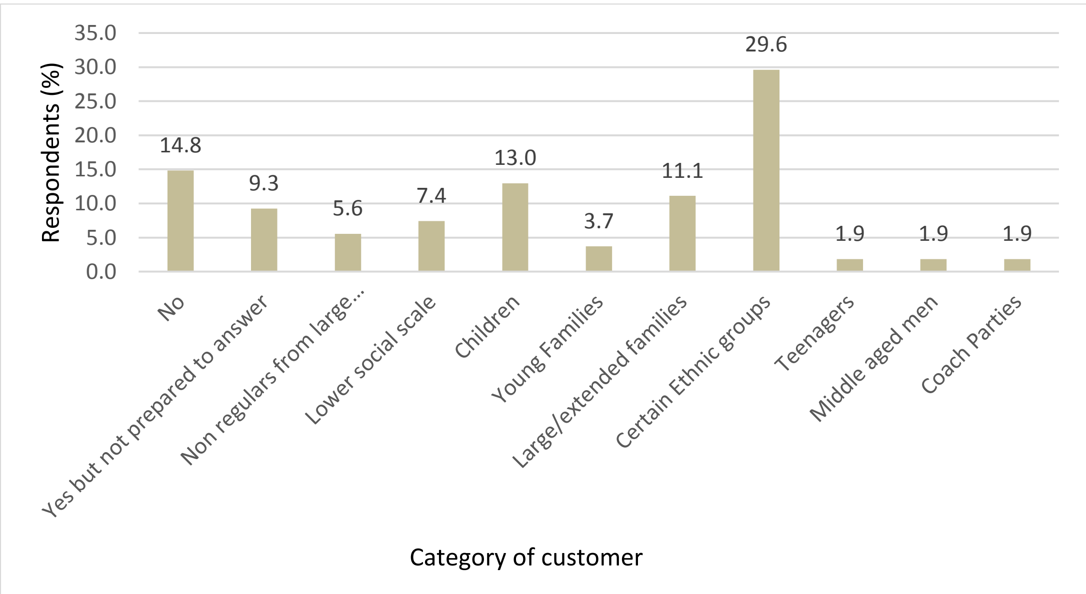
Chart3.



(Source: Authors own, 2016)

Respondents were asked which customer group posed particular problems, and results showed that there do seem to be groups who eat more than others. This could show a level of cultural naivety in these groups, who aren't familiar with the PYO business model.

Chart 4: Which groups caused the most problems. Source: Authors own 2016



Waste. Leffew and Ernst (2014) indicate that waste caused by improper harvesting and damage to crops is a disadvantage of running a PYO enterprise. This is because the customers do not take the same care as the farmer would when harvesting the crop, wasting a lot more of the produce.

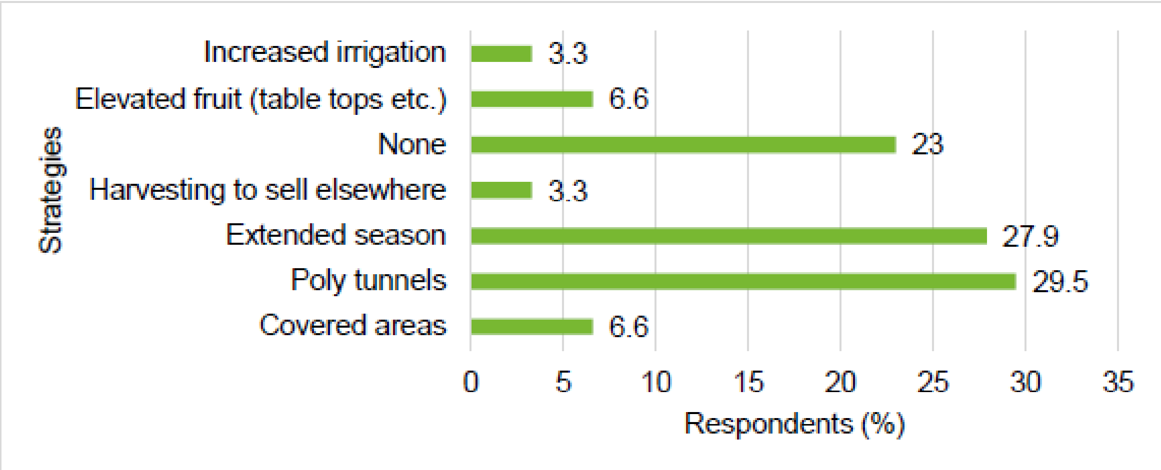
Location. Ernst and Woods (2014) indicated that location is an important factor affecting the PYO enterprise, and that operations that are easy to get to will have an obvious advantage. 28.9% of the questionnaire respondents indicated that location was the lowest threat to their PYO enterprises.

Weather. Extremes of weather significantly effects numbers visiting PYO's(Arney2013) The majority of PYO proprietors stated that weather is the biggest threat. Firstly, good conditions are needed for the growing and protection of the crop and secondly, customers would not visit in poor weather conditions.

So what strategies have surviving farmers used?

To deal with the problem of more unpredictable weather PYO's have adopted the following strategies:

Chart 5. Strategies used to overcome impacts of poor weather.



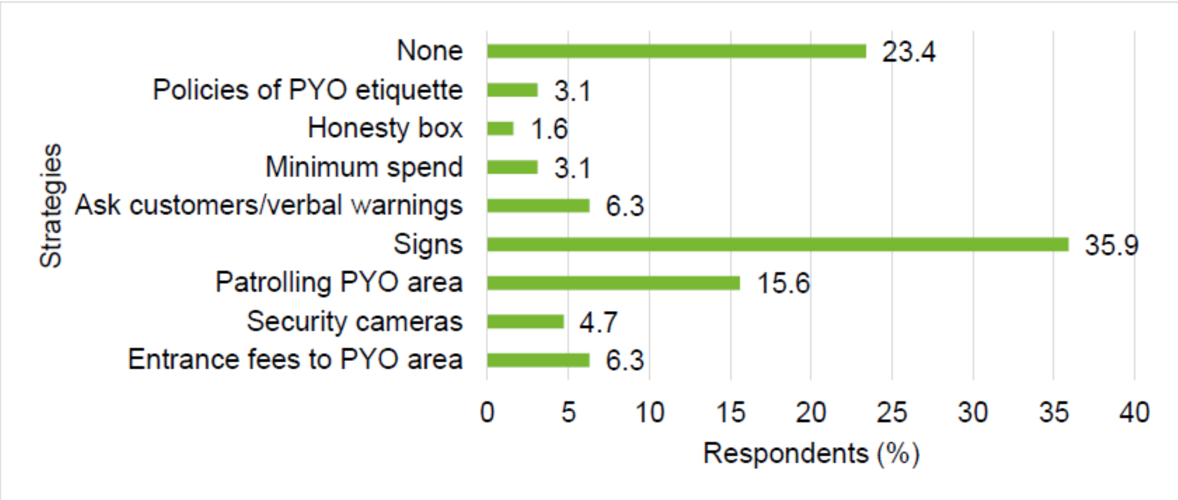
(Source: Authors own, 2016)

It is worth recalling the words of one of the farms no longer doing PYO,

Theft (eating without paying)

Chart 6 identifies strategies PYO proprietors use to reduce the impact of people consuming the fruit and vegetables without paying. 23.4% of the respondents stated that they do not use any form of strategy to mitigate the impact of theft and visitors consuming without paying for the produce, but most use one or more of those listed.

Chart 6



(Source: Authors own, 2016)

Signage

Of the respondents, 35.9% used signage to deter visitors from consuming without paying. Farm A uses signs, trying to apeal to the better nature of the visitors and Farm B use signs saying ‘we would like you to try our fruit but please do not abuse our trust and take advantage’.

Security

A further 15.6% of PYO proprietors have people patrolling the PYO area and exit. All three Farms ensured staff walk around the farm and speak to any visitors who are considered to be taking advantage of the system. Farm C stated that they do not want the visitors to feel like they are being watched or monitored, so they prefer to explain the rules to customers before they enter the PYO areas.

Entrance Fees

In addition, 6.3% of respondents indicated that they charge entrance fees to the PYO areas. Farm A stated that in terms of controlling people, charging an entrance fee would be the best strategy for bettering returns, but after attempting to implement this strategy, had decided it was difficult to operate due to poor customer attitudes.

Pricing

Findings indicate that 83.6% of PYO proprietors base produce prices on competitor prices. When asked if prices are changed seasonally 28.6% stated yes, 49% stated sometimes and

22.4% stated no. Farm A and C indicate that prices increase year on year as costs and inflation rise. Farm B add that prices should be slightly cheaper than supermarkets. This suggests that PYO's take a competitive approach to pricing, supporting the findings of Dibb *et al*. (2012).

The majority (75.5%) of proprietors do not take into account the 'PYO experience' in the prices and the majority (59.2%) do not charge higher prices to take into account the produce eaten, supporting the findings of Norman (1914).

Only 11.9% of visitors to Farm A said that price was the main reason for visiting, contradicting the findings of DEFRA (2014a) who stated that price is the most important factor. As mentioned before, some PYO's have implemented strategies such as entrance fees or minimum charge to generate income and combat financial issues caused by PYO threats.

Location

Farm A stated location was the lowest threat to the PYO as although the PYO is in a very rural location, visitors treat it as a visit to the country and increased use of advertising (in particular online) can be used to promote the enterprise to a large customer base. Farms B and C state that they are both happy with location and that it is not considered a threat. This supports the findings of Chase and Grubinger (2014) and Thistlethwaite (2012) in that the success of a PYO is only partly dependent on a farms location and that PYO's do not need to be close to major population centres to be successful. This is supported by website comparison which revealed that 9 out of 10 PYO's have a website. However, only 20% were rated a sophistication level of 4-5 which requires an advanced interaction, attractive layout and extras such as enlisting subscriptions and online newsletters.

In conclusion, proprietors indicated that the customer profile of PYO visitors has changed over the years. The most common visitor is now aged 31-40, travelling over 50+ miles and only visiting once a year, with their whole family. Large groups, however, do not often spend the most money and would appear to just enjoy the day out. This could lead to increased theft, damage and public liability claims, and appears to be a contributor as to why some PYO's are now struggling.

There is a mismatch of perception on what the core PYO product is. Visitors stated that they visit for the fresh, high quality PYO produce, whereas, the proprietors think that they visit for the PYO experience and offer ancillary services such as a café and play/picnic area. This would indicate, that proprietors have focussed on the experience at the expense of the produce. Proprietors would therefore need to take this into consideration when they market their PYO enterprises.

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Appendix 1

Comparison of PYO Farm A, Farm B and Farm C

	PYO Farm A	PYO Farm B	PYO Farm D
Location	Herefordshire	Gloucestershire	Oxfordshire
PYO enterprise started	1983	1970	2003
Land used as PYO	Just over 50 acres	About 15 acres	15-18 acres
Average number of visitors weekly during peak season (approximately)	1000	Cannot predict	1000
Opening season for PYO	End of April until end of October	End of May until October	Middle of April to end of October
Opening hours	9.30 – 5.30 Monday- Sunday. At the start of the season close at 4.	June to September Mon – Sat 9am – 6pm Sun 10am – 5pm (June & July Sun 9am – 6pm) October to May (inclusive) Mon – Sat 9am – 5pm Sun 10am – 4pm	Mon – Fri 9 – 6, weekends 9 – 5 Bank Holiday Monday closing at 4.
Number of crops for PYO	40 (a mixture of fruit and vegetables)	15 (mostly fruit with the addition of sweetcorn, French beans and Runner beans)	12 (Just fruit)
Most popular PYO product	Strawberries, Raspberries and Cherries	Strawberries	Cherries