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Meat & Livestock Australia Awareness & Adoption KPI 2006 Survey

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Executive Summary

A previous evaluation of the performance of the LPI communication programs was undertaken in 2005 using a comprehensive sampling approach and detailed questionnaire. The **KPI 2006 Survey** is based on a revised methodology that concentrates on the assessment of LPI's Adoption & Capacity KPI's.

This involves quantifying the level of **awareness** that exists amongst livestock producers of MLA courses and programs, as well as the rate of **adoption** by producers of the innovations and management practices being promoted within MLA courses and programs.

MLA's On-Farm Adoption & Capacity KPI's for 2005-2006 were to:

1. Increase awareness of MLA's tools & information by **5%** of targeted producers.
2. Increase the rate of trial of, or participation in, MLA's tools & information by **5%** of targeted producers.
3. Encourage increased adoption of at least one key management practice by **5%** of targeted producers.

This survey stratifies responses from a sample of MLA's main producer segments of **Northern Beef Producers**, **Southern Beef Producers** and **Southern Sheep or Lamb Producers** to a 90% confidence interval for each segment based on an overall sample of **n=553**. This was split into two segments to address the KPI's:

Tier 1 was constructed to evaluate **program awareness** amongst the general livestock producer population, it included **n=204** producers randomly selected from a database of over 80,000 livestock producers across Australia.

Tier 2 provided a measure of the **level of adoption** of new management practices, it involved a sample of **n=349**, including producers who participated in extension programs since the last survey undertaken in July 2005 (these include 3,080 attendees of Edge, More Beef from Pastures, PIRDS, Cost Of Production workshops and Prime Time courses). Tier 2 also included a sample of the 5,041 producers who participated in MLA programs prior to July 2005.

This aggregated sample provides a cumulative picture¹ of management practice adoption amongst known course participants dating back to when MLA courses and programs commenced.

The contents of this report deals with the overall cumulative sample results represented in the two data files:

- ❑ **Tier 1 MLA_Awareness_06V2.doc**
- ❑ **Tier 2 Weighted MLA_All_Courses_06V2.doc**

The Tier 1 sample evaluated the level of course and program awareness amongst the wider producer population and the Tier 2 sample concentrated on evaluating the effectiveness of the course and programs in creating management change amongst actual course participants.

Where possible results from the KPI 2006 Survey have been compared with the 2005 LPI Survey and/or the 2005 EDGE & More Beef from Pastures Survey.

¹ The cumulative data has been weighted to the known population of course attendees based on the contacts available, other course participants not known have been excluded from the population and subsequent sampling calculations.

Awareness (Tier 1 $n=204$)

Awareness of MLA extension programs has risen overall by **14%** since the 2005 LPI Survey, this increase in overall course awareness is apparent in each of the producer segments.

The figures below represent the aided & unaided awareness of MLA extension programs as well as the overall aggregated awareness.

- ❑ **28%** of livestock producers surveyed indicated an unprompted or unaided awareness of MLA Program(s), this represent an increase of **5%** from the 2005 figure of **23%**.
- ❑ **84%** of livestock producers surveyed, when prompted, recalled one or more of the MLA courses or program(s) mentioned, this also represents an increase of **21%** from **63%** in 2005.
- ❑ Overall, **87%** of all livestock producers surveyed recalled one or more of the MLA courses or program(s) mentioned, this represents a total increase of **14%** from **73%** in 2005.
- ❑ **13%** of respondents were unaware of any MLA courses or program(s). This appears to be significantly fewer than the levels in 2005 which were as high as 31% for Northern Beef, 27% for Southern Beef and 19% for Southern Sheep.
- ❑ Of further interest is **79%** of those respondents interviewed in the Tier 1 sample ($n=204$) indicated they were MLA Members.
- ❑ **90%** of members were aware of one or more MLA extension program(s), this appears to represent an **increase of 10%** since the 2005 survey, indicating member communication is having an impact.

In gathering this data, the survey's questionnaire² specifically mentioned Meat & Livestock Australia, informing the respondent that MLA organises and runs a range of programs for beef, sheep, lamb and goat producers. The question then asks 'Which MLA programs' is the respondent aware of, probing for any additional courses or programs.

Unaided or unprompted course awareness whilst still low has increased from the 2005 survey. Once prompted, producers recognise the individual program brands. This level of unaided awareness indicates an improvement in association with MLA and those courses/programs compared with the 2005 survey, however there is clearly scope to improve further.

(refer to appended survey data tables Tier 1 MLA_Awareness_06V2.doc)

² Refer to appendix for questionnaire details.

Adoption or Management Change (Tier 2 $n=349$)

The participant lists which were provided by MLA included 3,080 producers who had attended one or more of the MLA courses/programs since July 2005. (The 2005 EDGE/More Beef from Pastures survey sample was drawn from a database of 5,341 producer participants of those programs.).

The KPI 2006 Survey specifically addresses the cumulative level of adoption of management practices or change in management practices as a result of producers attending an MLA extension program. The Tier 2 sample includes only producers known to have attended MLA extension programs.

Based on a weighted sample of $n=349$, of all those livestock producers surveyed who have ever attended an MLA extension program, **67%** have been motivated to adopt new (or change) management practices as a result of attending or participating in the course or program (refer to Tier 2 Weighted MLA_All_Courses_06V2 data tables representing course participants from the past 6 years). This finding represents a similar level of adoption to the 65% of participants identified in the 2005 LPI Survey. Of those producers surveyed who recently attended an MLA extension program (in the 12 months leading up to the 2006 survey), **50%** indicated they had implemented a change in management practices as a result of participating in an MLA course or program.

- ❑ **69%** of all EDGE workshop attendees to date have been motivated to change management practices as a result of attending, this represents a fall of **9%** from the **78%** adoption level recorded in the 2005 EDGE survey. (**47%** of producers participating in an **EDGE** course or program in the 12 months leading up to the 2006 survey changed management practices).
- ❑ **44%** of More Beef from Pastures event attendees have changed management practices as a result of attending, this represents a increase of **7%** from the **37%** in the 2005 More Beef from Pastures survey. (**35%** of producers participating in the **More Beef from Pastures** program in the 12 months leading up to the 2006 survey have implemented change).
- ❑ Other courses not previously evaluated in the 2005 survey have also been responsible for the instigation of management change, since July 2005 **PIRD's** has motivated **72%** of participants to change management practices, **Prime Time 47%** and **Cost of Production workshops 30%**.

The KPI 2006 survey has identified a trend indicating the level of adoption of the management practices being promoted is being maintained (a cumulative result of **67%** in 2006 compared with **65%** in 2005).

The adoption trend between the participants of the last 12 months and the cumulative six year participants indicates that while many participants change practices within the first year of participation, the rate of adoption increases over longer periods. This longer time interval appears to be necessary for many to implement change.

As MLA increases its penetration amongst later adopters, then it may see adoption rates slow.

The **cumulative evaluation** of specific course participants from the 2005 Edge & More Beef from Pastures Survey ($n=300$) and the KPI 2006 Survey ($n=553$) provides an alternative perspective:

- ❑ To date **69%** of **EDGE** course participants indicated they changed management practices. This represents a fall of **9%** on the 2005 level of adoption.
- ❑ In addition, **44%** of **More Beef from Pastures** manual recipients, course & workshop participants, indicated they had adopted management practices as a result of course or program attendance or participation. This is an increase of **7%** from the 2005 level (note: the 2005 evaluation was undertaken when More Beef from Pastures had been in place for only 12 months).

(refer to appended survey data tables Tier 2 Weighted MLA_All_Courses_06V2.doc)

Summary

It is clear from this latest survey that the LPI communication strategies aimed at reaching producers has had a significant impact on **increasing the level of awareness** of at least one MLA extension program amongst the target producer segments by 14% to **87%**.

Improving on this level of overall awareness will be difficult, as it is likely to be close to saturation point. However work can still be done to raise the level of aided and unaided awareness of individual programs, so that producers can confidently recall course and program names as well as make the association with MLA without prompting.

The result of course attendance has remained constant with **67%** of course participants choosing to **adopt** new management practices (or make changes to management practices) as a result of participating in an MLA extension program.

The survey in 2005 discussed improving course content and embracing alternative communication channels to create a repeat impact for the messages MLA is communicating to producers.

These strategies appear to be working and should remain, however it is apparent from undertaking the KPI 2006 Survey that the time taken for producers to adopt management change varies by segment and course, this has a significant impact on the KPI evaluation process when recently introduced courses are included in the sample frame.

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1 Background

Meat & Livestock Australia (MLA) is responsible for the communication and extension of its on-farm R&D results to improve the profitability and sustainability of the Australian red meat industry.

A previous evaluation of the performance of the LPI communication programs was undertaken in 2005 using a similar sample and questionnaire. The KPI 2006 Survey aims to undertake a revision of the top line findings using an efficient survey sample to assess progress of the level of **awareness** of MLA programs, **participation** in them as well as the rate of **adoption** of the innovations and management practices being promoted within established development programs.

MLA's KPI's for 2005-2006 were to:

1. Increase awareness of MLA's tools & information by 5% of targeted producers.
2. Increase the rate of trial of, or participation in, MLA's tools & information by 5% of targeted producers.
3. Encourage increased adoption of at least one key management practice by 5% of targeted producers.

MLA invited Axiom Research (Axiom) to undertake market research approach to measure progress against these objectives. These objectives apply across each of the industry segments which include, **Northern Beef**, **Southern Beef** and **Southern Sheep/Lamb** producers.

Axiom's research in the rural sector is underpinned by FARMbase[®], Axiom's own well segmented database of Australia's primary industry participants.

Axiom conducted a **telephone survey** with **n=553** targeted producers, using a 2 tiered sample approach to satisfy overall industry **awareness** as well as the rate of participant **adoption** or change of management practices.

MLA specified that the statistical validity of the survey and its findings must satisfy a 90% confidence interval. Axiom stratified the sample to provide statistically significant data for each of the three targeted producer segments, for the overall sample of producers as well as those who have actually participated in courses and programs.

The survey's Tier 1 sample has been drawn randomly from FARMbase[®], to represent the overall livestock industry's awareness of the MLA courses and programs

The survey's Tier 2 sample has been made up entirely of previous participants from each extension program, these contacts were provided by MLA from a number of sources and compiled into one database for interviewing. A total of 3,080 participants in various workshops/programs from July 2005 to June 2006, and 5,361³ EDGE/More Beef from Pastures participants prior to July 2005.

³ These figures are based on the sum of the available course participant lists and do not represent all participants.

2 Project Objectives

The KPI 2006 Survey has been undertaken with a brief to provide the current level of course awareness and level of management change or adoption information using an efficient survey methodology.

The project specifically aimed to:

- ❑ Determine the overall level of awareness of MLA programs and courses being promoted by LPI;
- ❑ Determine the level of adoption or subsequent uptake and implementation of the programs and courses as a ratio of the producers who have participated in MLA courses;
- ❑ Evaluate these findings using regional and demographic segmentation including a psychographic profile where producers are categorised from innovators to Laggards. Other segmentation includes age, decision-making capacity and MLA membership status.

The underlying objective of the KPI Survey is to evaluate the impact of the extension programs on producer management change, and the effectiveness of the communication processes employed by LPI to achieve this change.

3 Methodology and Sample

Axiom has followed the sampling protocols established for the LPI 2005 survey to construct a segmented sample of targeted livestock producers, the survey has been undertaken from two separate perspectives or data sources. The methodology addressed the collection of the required information from these two sources:

1. Tier One Sample (**n=204**): Evaluate **Awareness** of MLA course/program(s) using a random sample of the **targeted** population of **producers** segmented by their region and enterprise into Northern beef, Southern beef and Southern Sheep/Lamb. (*FARMbase random sample, target producers n=205*)
2. Tier Two Sample (**n=349**): Evaluate **Adoption** of management practices amongst a sample of **n=236** producers, from MLA's own databases, **known participants** from all 5 MLA program or course groups from July 2005 to June 2006 (N=3,080), as well as an additional sample of **n=113** of course and program participants from prior to July 2005. This sample of pre July 2005 participating producers includes Edge & More Beef from Pastures course participants and was based on the pre 2005 MLA course participant lists compiled from all MLA course participants lists provided in 2005 (N=5,361). (*MLA course participant sample, target producers n=370*)

Based on this approach the project had two critical elements, the first is the detailed sample construction that mirror the 2005 survey and satisfy the validity issues required. Secondly is the design of the questionnaire and implementation of the survey using telephone interviewing.

The survey instrument was designed using a master questionnaire and code-frame response mechanism that directed specific questions at each of the target segments. The actual survey was managed using CATI (Computer Assisted Telephone Interviewing) methodology, telephone interviewing (field-work) was undertaken by Interviewing Australia. Axiom's DP partner D & M Research undertook all data processing.

- ❑ Screeners were also employed to ensure respondents qualified for the survey in terms of enterprise mix and type. Where respondents had less than 100 hectares we terminated the interview (refer to the questionnaire contained in the appendix).
- ❑ Those respondents who are course participants only completed those sections of the survey applicable to them.

The detailed data tables generated have been collated to represent the findings by producer segment, age, decision-making capacity, psychographic segments, state, and for course participants by courses/programs attended.

Segmentation of the sample and the resulting data has been a key driver in the design of the survey, aspects of the industry that influenced the sample included:

- ❑ Producer segments – Northern Beef, Southern Beef and Southern Sheep

Included in the random sample quota were producer locations - High Rainfall, Wheat/Sheep, & Pastoral zones) representing the same production regions as the 2005 LPI Awareness & Adoption survey

- ❑ MLA membership

Psychographic profile including, Innovator, Early Adopter, Early Majority, Late Majority and Laggards (Rogers, E.M. (2003), *Diffusion of Innovations*, Free Press, NY)

Applying the psychographic profile to the sample of producers involved the evaluation of producer's responses to Q9.3 through to Q9.5. Respondents were asked to identify their sources of information, adoption of new technology, level of participation in research programs as well as their level of involvement in the decision making process.

To determine which segment each respondent fell into, a response matrix was developed based on predicted responses (source: Australian Venture Consultants) – see below. Note where the respondent's answers did not exactly match the matrix, they were subjectively allocated to a segment that most closely matched the majority of that person's responses.

Table 1: Matrix of Predicted Response by Psychographic Segment

	Innovator	Early Adopter	Early Majority	Late Majority	Laggard
Q9.3 Have you ever participated in collaborative research programs with Universities, State DPI, MLA, AWI, GRDC, or some other research body?	Yes	No	No	No	No
Q9.4 On average, approximately how many new technologies have you adopted or management practices have you changed per year across your business over the last 5-10 years? (eg 0-1, 1-2, 2-5, >5 NB not sure if this is an appropriate range)	top 25% tier	25%-50% tier	50-75% tier	75-100% tier	None
Q9.4 From what source do you generally first hear about most new technologies or management practices? (eg rural newspapers, farm magazines, ABC radio, DPI, stock & station agent, rural merchant, state farmer organization, MLA, AWI, family member, producer network or group, other individual producers, workshops or seminars, internet, other)	Technical farm publications Conferences	Colleagues Farmer organisation Producer network or group Workshops	Workshops or seminars MLA, AWI etc	Stock Station Agent or DPI, AWI, MLA	Where not elsewhere allocated
Q9.5 Who or what do you generally rely on when you need advice about how to use or apply most new technologies or management practices? (eg family member, DPI, stock & station agent, rural merchant, farm consultant, accountant, bank, state farmer organization, MLA, AWI, family member, producer network or group, other individual producers, workshops or seminars, internet, other)	Technical professionals (MLA or AWI)	Technical Professionals (MLA/AWI) Producer network or group	Workshop or seminars Farm consultant	Farm consultant Other	Where not elsewhere allocated

3.1 Sample Overview

3.1.1 Sample Profile and Demographics

MLA defines the market into three distinct property categories that encompass the targeted primary industries of beef, sheep and goats.

Table 2: Definition of Targeted Industry/Producer Segments

Northern Beef producers	All beef cattle producers in Queensland, Northern Territory, and the Kimberley/Pilbara regions of Western Australia
Southern Beef producers	All beef cattle producers in New South Wales, Victoria, South Australia, southern Western Australia and Tasmania
Southern Sheep & Lamb meat producers	All sheep producers in New South Wales, Victoria, South Australia, southern Western Australia and Tasmania that are producing sheep or lambs for the red meat industry.
Goat producers⁴	All goat producers in New South Wales, Victoria, South Australia, southern Western Australia and Tasmania that are producing goats for the red meat industry.

The previous sample for the 2005 survey was drawn from only these producer segments, this approach has been repeated for the KPI 2006 Survey to ensure the findings reflect the changes for each producer segment directly.

Axiom has constructed an overall sample of targeted producers from our own database of livestock producers known as FARMbase[®], using as a base the available contacts detailed below.

Table 3: FARMbase[®] Sample Profile (Available Contact Counts July 2006)

State:	MLA Region	Grain Sheep & Beef	Sheep & Beef	Sheep	Beef	Livestock n.e.c.	TOTAL:
NSW/ACT	Southern	8,941	3,449	4,277	8,277	852	25,796
NT	Northern	16	2		249	9	276
QLD	Northern	2,740	1,273	672	9,719	586	14,990
SA	Southern	4,285	574	1,187	939	330	7,315
TAS	Southern	176	208	348	694	66	1,492
VIC	Southern	4,605	1,116	2,868	6,866	404	15,859
WA North	Northern	35	91	21	69	33	249
WA South	Southern	2,705	1,182	651	9,650	553	14,741
TOTALS		23,503	7,895	10,024	36,463	2,833	80,718

This producer profile from FARMbase is based on ABS industry definitions. In order to qualify for one of the three MLA industry segments respondents were screened on the basis of the significance of their key enterprise to their overall income. In the case of livestock operations the dominant enterprise is easily identified, however in mixed cereal farming situations respondents were segmented on the basis of respondents own ranking of their dominant livestock enterprise⁵.

⁴ A very small sample of goat producers was obtained, they appear in the Southern Sheep data and in the tables as a separate enterprise type.

⁵ Refer to the questionnaire Section 1: Q1.

The table below represents details of the producer segments and *targeted* sample sizes to statistically evaluate variations within segments. The actual sample sizes obtained are also included in bold.

Table 4: Sample Profile by Target Industry Segment

	Tier 1: FARMbase Contacts		Tier 2: MLA Course Contacts	
Producer Segment:	Awareness		Adoption/Management Change	
Northern Beef	<i>n=50</i>	<i>n=50</i>	<i>n=15</i>	<i>n=78</i>
Southern Beef	<i>n=70</i>	<i>n=73</i>	<i>n=130</i>	<i>n=126</i>
Southern Sheep/Lamb	<i>n=70</i>	<i>n=78</i>	<i>n=120</i>	<i>n=145</i>
Goats	<i>n=15</i>	<i>n=13</i>	<i>n=15</i>	<i>n=3</i>
	<i>n=205</i>	<i>n=204</i>	<i>n=370</i>	<i>n=349</i>

The **Tier 1** (Awareness) sample target of *n=205* and **Tier 2** (Adoption) sample target of *n=370* has been determined using a minimum sample requirement of *n=50* within each industry segment (this sample base has also been applied to each course segment within the overall quota construct), this is a minimum sample size that will satisfy a 90% confidence interval where response mean distribution (margin of error) is likely to be relatively small or narrow (within 10%).

Note that in Tier 1 some producers were also running goats, these respondents have been counted once in the total but have been included under Goats and their other livestock enterprise.

The Tier 2 sample aimed to include a representative sample of producers who have participated in PIRDS *n=50*, EDGE *n=50*, More Beef from Pastures *n=50*, Prime Time *n=50*, and Cost of Production workshops *n=50*. Note these minimum target sample bases were subject to availability from contact lists, in most cases these targets have been exceeded however with PIRD's and Cost Of Production workshops a small sample frame has meant a lower sample was obtained.

Table 5: Available Course Participant Contacts (Source MLA)

MLA classifications:	Course/Program	Course Participants List Pre July 2005 (N=5,361)	Course Participants List Post July 2005 (N=3,080)	Total Course Participants List (N=8,441)	% of Known Participants
	More Beef from Pastures	N=1,259	N=819	N=2,078	25%
	Prime Time		N=665	N=665	8%
	PIRD's		N=109	N=109	1%
	EDGE	N=4,102	N=1,447	N=5,549	66%
	Cost Of Production		N=40	N=40	-

Note: It is apparent that the aggregation of course participation lists for the purpose of undertaking the survey has not included all participants from all courses (refer to recommendations for comments on this situation).

n=553 livestock producers participated in the **KPI 2006 Survey**, these respondents make up the 2 sample tiers to accurately represent awareness and adoption representing the key sample segments shown below.

Table 6: Actual Sample Segmentation

		NSW/ ACT	VIC	QLD	SA/ NT	WA	TAS	North Beef	South Beef	South Sheep	Goats
Total Sample:	<i>n=553</i>	105	110	111	102	76	49	128	199	223	16
Tier 1 (Awareness)	<i>n=204</i>	46	20	40	38	40	20	50	73	78	13
Tier 2 (Adoption)	<i>n=349</i>	59	90	71	64	36	29	78	126	145	3

The Tier 2 sample needed to be larger to adequately represent the various program groups and sub groups of interest. Sample segments below *n=30* should be treated with caution, tables will identify statistical significance by allocating an alpha character below the data point.

As the survey process involved collecting a separate sample from the pre July 2005 and post July 2005 course participants, data has been weighted to each of the known sample frame groups before being combined and included in the tables. This means that any variation in sample size does not bias the final results.

4 KPI 2006 Survey Results

4.1 MLA Program Awareness (Tier 1 Sample $n=204$)

This aspect of the KPI project follows on closely from previous LPI surveys designed to determine producers unaided and aided awareness of the MLA programs as a means of evaluating the effectiveness of the overall communication strategy by LPI.

The KPI 2006 Survey evaluated course awareness from an independent random sample of $n=204$ livestock producers, where producers with all levels of exposure to MLA had an equal chance of participation.

- ❑ Overall, **87%** of all respondents recalled one or more of the MLA Courses or Program(s) mentioned, this represents a total increase of **14%** from **73%** in 2005.
- ❑ **28%** of respondents indicated an unprompted or unaided awareness of MLA Program(s), this represent an increase of **5%** from the 2005 figure of **23%**.
- ❑ **84%** of respondents, when prompted, recalled one or more of the MLA Courses or Program(s) mentioned, this also represents an increase of **21%** from **63%** in 2005.
- ❑ **13%** of respondents were unaware of any MLA Courses or Program(s), this appears to be significantly fewer than the levels in 2005 which were as high as 31% for Northern Beef, 27% for Southern Beef and 19% for Southern Sheep.

The percentages represented below will not add to overall awareness, as nett prompted responses will include producers recognising other programs not previously mentioned.

Note: The Total Awareness analysis counts each producer only once no matter how many programs they recall either aided or unaided

Table 7: Course/Program Awareness by Target Industry Segment (Survey 2005 and Survey 2006)

	2005 Awareness ($n=907$)			2006 Awareness ($n=204$)		
	Unaided	Aided	Total	Unaided	Aided	Total
Northern Beef Producers (2005 $n=297$, 2006 $n=50$)	19%	62%	67%	22%	74%	78%
Southern Beef Producers (2005 $n=321$, 2006 $n=73$)	26%	60%	73%	29%	85%	86%
Southern Sheep/Lamb Producers (2005 $n=279$, 2006 $n=78$)	26%	64%	80%	28%	90%	92%
Total:	23%	62%	73%	28%	84%	87%

The overall nett effect, is that **87%** of livestock producers surveyed are aware of one or more MLA program(s), buoyed by the high recognition of programs amongst Southern Sheep Producers. Awareness has risen significantly across all segments both aided and unaided.

The high recall after interviewer prompting continues to indicate that the language 'MLA programs' used in the question is either not a top of mind phrase, or that a level of confusion exists as to which organisation is responsible for the program names they are familiar with.

Overall awareness by course/program is as follows (NB expressed as a percentage of all producers, not just those for which each program is targeted).

Table 8: Unaided and Aided Course/Program Awareness Overall

MLA classifications:	Course/Program	Unaided Awareness	Aided Awareness	Total Awareness
	More Beef from Pastures	6%	46%	54%
	Prime Time (or Making More from Merino's)	3%	36%	38%
	PIRD's (or Producer Research Support)	2%	36%	38%
	EDGE (any EDGE or EDGE network course)	8%	60%	62%
	Cost of Production workshops	1%	36%	37%
	Non MLA Events (Courses conducted by organisations other than MLA where MLA contributed either course content or sponsorship)	1%	27%	28%
	Total:	28%	84%	87%

(Tier 1 Sample Base **n=204**)

Total awareness of each program by target industry segment is as follows (NB expressed as a percentage of those producers for which each program is targeted).

Table 9: Course/Program Awareness by Target Industry Segment

MLA classifications:	Course/Program	Northern Beef (n=50)	Southern Beef (n=73)	Sheep/Lamb (n=78)
	More Beef from Pastures	44%	60%	54%
	Prime Time (or Making More from Merino's)	8%	26%	68%
	PIRD's (or Producer Research Support)	38%	32%	43%
	EDGE (any EDGE or EDGE network course)	56%	58%	72%
	Cost of Production workshops	42%	29%	42%
	Non MLA Events (Courses conducted by organisations other than MLA where MLA contributed either course content or sponsorship)	14%	32%	33%
	Total:	78%	86%	92%

(Tier 1 Sample Base **n=204**)

Table 10: Course/Program Awareness by Target Industry Segment (Survey 2005 and Survey 2006)

MLA Course/Program classifications:	Northern Beef		Southern Beef		Sheep/Lamb		Total (n=907)	Total (n=204)
	2005	2006	2005	2006	2005	2006	2005	2006
More Beef from Pastures	-	44%	61%	60%	39%	54%	-	54%
Prime Time (or Making More from Merino's)	-	8%	21%	26%	65%	68%	-	38%
PIRD's (or Producer Research Support)	31%	32%	32%	32%	41%	43%	35%	38%
EDGE (any EDGE or EDGE network course)	49%	56%	26%	58%	31%	72%	36%	62%
Cost of Production workshops	-	42%	-	29%	-	42%	-	37%
Non MLA Events (Courses conducted by organisations other than MLA where MLA contributed either course content or sponsorship)	-	14%	-	32%	-	33%	-	28%
Total:	69%	78%	73%	86%	81%	92%	73%	87%

(refer data tables 9-10)

4.1.1 MLA Program Awareness by Psychographic Profile

Those producers in the Early Majority segment make up **33%** of the sample, these coupled with the Innovators and Early Adopters are more aware of the MLA courses and program(s) being promoted than the Late Majority and Laggard segment.

- ❑ **72%** of the Early Majority segment are aware of Edge courses, high awareness of Edge is consistent in each psychographic segment except the Laggards where awareness is lower overall.

Table 11: Course/Program Awareness by Psychographic Segment

MLA Course/Program classifications:	Total 100%	Innovators 15%	Early Adopters 8%	Early Majority 33%	Late Majority 32%	Laggards 12%
More Beef from Pastures	54% <i>n=110</i>	71% 20%	50% 7%	55% 34%	54% 32%	32% 7%
Prime Time (or Making More from Merino's)	38% <i>n=78</i>	42% 17%	56% 12%	37% 32%	37% 31%	28% 9%
PIRD's (or Producer Research Support)	38% <i>n=77</i>	53% 22%	63% 13%	37% 33%	31% 26%	20% 7%
EDGE (any EDGE or EDGE network course)	62% <i>n=127</i>	71% 17%	75% 9%	72% 38%	62% 32%	20% 4%
Cost of Production workshops	37% <i>n=75</i>	45% 19%	31% 7%	42% 37%	28% 24%	40% 13%
Non MLA Events (Courses conducted by organisations other than MLA where MLA contributed either course content or sponsorship)	28% <i>n=57</i>	39% 21%	13% 4%	31% 37%	29% 33%	12% 5%
Total:	87%	93%	94%	91%	86%	64%

(Tier 1 Sample Base *n=204*)

(refer data table 10)

It is apparent from this analysis that communication strategies are reaching each of the profiles with mainly the Laggard producers unaware of some of MLA's key course and program streams.

Table 12: Course/Program Awareness by Psychographic Segment in Northern Beef Producers

MLA Course/Program classifications:	Total 100%	Innovators 20%	Early Adopters 8%	Early Majority 32%	Late Majority 30%	Laggards 10%
More Beef from Pastures	44% <i>n=22</i>	70% 32%	25% 5%	44% 32%	47% 32%	-
PIRD's/Producer Research Support	38% <i>n=19*</i>	60% 32%	50% 11%	38% 32%	33% 26%	-
EDGE (any EDGE or EDGE network course)	56% <i>n=28</i>	70% 25%	75% 11%	63% 36%	47% 29%	-
Cost of Production	42%	60%	50%	44%	33%	20%

workshops	n=21	29%	10%	33%	24%	5%
Total:	78%	90%	100%	75%	87%	20%

(Tier 1 Northern Beef Sample Base n=50)
 *Low sample base.

Table 13: Course/Program Awareness by Psychographic Segment in Southern Beef Producers

MLA Course/Program classifications:	Total 100%	Innovators 12%	Early Adopters 3%	Early Majority 33%	Late Majority 34%	Laggards 18%
More Beef from Pastures	60% n=44	89% 18%	50% 2%	67% 36%	52% 30%	46% 14%
Prime Time /Making More from Merinos	26% n=19*	33% 16%	50% 5%	29% 37%	24% 32%	15% 11%
PIRD's/Producer Research Support	32% n=23	56% 22%	100% 9%	29% 30%	28% 30%	15% 9%
EDGE (any EDGE or EDGE network course)	58% n=42	56% 12%	100% 5%	75% 43%	60% 36%	15% 5%
Cost of Production workshops	29% n=21	33% 14%	50% 5%	38% 43%	12% 14%	39% 24%
Non MLA Events	32% n=23	56% 22%	-	38% 39%	28% 30%	15% 9%
Total:	86%	100%	100%	96%	76%	77%

(Tier 1 Southern Beef Sample Base n=73)

*Low sample base.

Table 14: Course/Program Awareness by Psychographic Segment in Southern Sheep/Lamb Producers

MLA Course/Program classifications:	Total 100%	Innovators 15%	Early Adopters 12%	Early Majority 33%	Late Majority 31%	Laggards 9%
More Beef from Pastures	54% n=42	58% 17%	56% 12%	62% 30%	58% 33%	29% 5%
Prime Time /Making More from Merinos	68% n=53	67% 15%	78% 13%	62% 30%	71% 32%	71% 9%
PIRD's/Producer Research Support	43% n=33	50% 18%	56% 15%	46% 36%	29% 21%	43% 9%
EDGE (any EDGE or EDGE network course)	72% n=56	83% 18%	67% 11%	77% 36%	71% 30%	43% 5%

Cost of Production workshops	42% <i>n=33</i>	42% 15%	22% 6%	46% 36%	42% 30%	57% 12%
Non MLA Events	33% <i>n=26</i>	58% 27%	-	31% 31%	42% 39%	14% 4%
Total:	92%	92%	89%	96%	96%	71%

(Tier 1 Southern Sheep/Lamb Sample Base ***n=78***)

(refer data tables 11-13)

MLA Program Awareness by Producer Segment

Previous MLA surveys have tracked the changing level of awareness for its various courses and programs by target industry segment. However, variations in each of the surveys objectives, methodology and course focus has meant that not all courses conducted by MLA can be tracked longitudinally (denoted by *na* in the following tables).

- ❑ In 2006, **78%** of Northern Beef Producers are **aware** of MLA programs and courses, this represents an increase of **11%** from 67% in 2005.
- ❑ This level of awareness is largely due to the Edge program activities which achieved 56% awareness amongst Northern Beef Producers.

The Edge course awareness is the result of obtaining a nett Edge awareness from a random sample of producers. In 2005 the questionnaire prompted respondents to identify levels of awareness for specific Edge courses in the target regions, this process was repeated in 2006 and supports the validity of the nett Edge results comparison.

Table 15: Northern Beef Producers

Awareness - Northern Beef Producers	2005 survey (n=297)	2006 survey (n=50)
Total Awareness:	69%	78%
PIRDS	31%	38%
<i>BeefPlan</i>	46%	<i>na</i>
Nett EDGE:	49%	56%
<i>Edge Network</i>	21%	14%
<i>Breeding Edge</i>	19%	<i>na</i>
<i>Nutrition Edge// Northern Nutrition</i>	31%	48%
<i>Grazing Land Management</i>	26%	42%
<i>Selling Edge</i>	14%	<i>na</i>
<i>Marketing Edge</i>	26%	<i>na</i>
Non MLA Events	<i>na</i>	14%
None (No Awareness of Programs at all)	31%	22%

- In 2006, **86%** of Southern Beef producers are aware of MLA programs, this represents an increase of **13%** from 73% in 2005 for all programs promoted to this target segment.

Table 16: Southern Beef Producers

Awareness - Southern Beef Producers	2005 survey	2006 survey
	Southern Beef (n=321)	Southern Beef (n=73)
Total Awareness:	73%	86%
PIRDS	32%	32%
Prime Time or Making More from Merinos	27%	26%
More Beef from Pastures	61%	60%
Nett EDGE:	26%	58%
Edge Network	25%	32%
Prograze	na	40%
Effective Breeding	na	na
Bizcheck for Meat	na	na
Enterprise Health Check	na	na
Beef Cheque	na	18%
Lamb Cheque	na	8%
Cost of Production	na	29%
Non MLA Events	na	32%
None (No Awareness of Programs at all)	27%	14%

In 2006, **92%** of Sheep/Lamb producers are aware of MLA programs and courses, a significant increase of **12%** from 80% in 2005.

Table 17: Sheep/Lamb Producers

Awareness - Sheep/Lamb Producers	2005 survey (n=279)	2006 survey (n=78)
Total Awareness:	80%	92%
PIRDS	41%	42%
Prime Time or Making More from Merinos	65%	68%
Nett EDGE:	31%	72%
Edge Network	30%	33%
Prograze	na	49%
Effective Breeding	na	na
Lamb Cheque	na	17%
Wean More Lambs	na	54%
Cost of Production	na	43%
Non MLA Events	na	33%
None (No Awareness of Programs at all)	19%	8%

4.1.2 Overall Awareness by MLA Membership Status

The KPI 2006 Survey did not set out to gather a representative sample of members versus non-members, however it did record the membership status of the sample.

- ❑ **79%** of those respondents interviewed in the Tier 1 sample ($n=204$) indicated they were MLA Members, this figure is regarded as overstating the actual level of membership and represents producers perception of their membership status.
- ❑ **90%** of members were aware of one or more MLA courses or program(s), this appears to represent an **increase of 10%** since the 2005 survey.
- ❑ **67%** of members are aware of the **EDGE** courses and **61%** are aware of **More Beef from Pastures**, these courses are the most widely recognised by members.
- ❑ Awareness amongst non-members has also increased with **59%** of non-members indicating awareness of one or more MLA courses, this also represents an **increase of 10%** since the 2005 survey.
- ❑ **33%** of non-members are aware of **EDGE**.

Table 18: Course/Program Awareness by Membership Status

	2005 ($n=907$) Awareness		2006 ($n=204$) Awareness	
	Member	Non Member	Member	Non Member
Aware of MLA Programs	80%	49%	90%	59%
None (No Awareness of Programs at all)	19%	49%	10%	41%

(refer to appended survey data tables Tier 1 MLA_Awareness_06V2.doc)

4.2 Change in Management Practices (Tier 2 Sample $n=349$)

4.2.1 Management Changes Overall

Adoption of MLA practices either through the tools and procedures of the More Beef from Pastures manual or like recommendations in other courses is referred to in the KPI brief as a **change in management practice**.

The KPI 2006 Survey sampled $n=349$ course attendees to determine if course participation directly influenced a change in management or adoption of new management practices.

- **67%** of all course participants surveyed (cumulative sample of participants drawn from 6 yrs of participant data⁶) indicated they have changed management practices as a direct result of attending one or more of the MLA course or programs nominated.

(By comparison, the 2005 LPI Awareness & Adoption survey indicated that of those who had attended an MLA program ($n=208$), **65%** initiated a change in management practice as a result of attending that course).

Table 18: Management Practice Change by Target Industry Segment

Producer Segments:	2005 Survey		2006 Survey	
	Changed	Did Not Change	Changed	Did Not Change
Northern Beef Producers	64%	36%	57%	43%
Southern Beef Producers	64%	36%	65%	35%
Southern Sheep Producers	66%	34%	74%	26%
Total :	65%	35%	67%	33%

(2005 LPI Sample Base $n=208$, KPI 2006 Tier 2 Sample Base $n=349$)

Note - The 2005 results for management change was a general question and was not directly linked to the courses respondents had participated in, whereas the KPI 2006 Survey specifically addressed this question.

(refer data tables 3&4)

⁶ Sample frame has been constructed from course attendance files provided by MLA in July 2005 and again in June 2006.

4.2.2 Management Changes by Course/Program

- ❑ **49%** of all course participants were influenced by **EDGE** program(s) to change management practices (this equates to 69% of all EDGE course attendees); this was highest amongst the **Southern Sheep/Lamb** segment where **74%** of producers were influenced to change management practices as a result of attending an EDGE course.
- ❑ The sample drawn from the cumulative participant database of the Edge program has meant that Edge accounts for the largest number of producers from the sample (66% of known course participants), in terms of influencing practice change.

Table 19: Management Practice Change by Course/Program & Target Industry Segment

MLA classifications:	Course/Program	Northern Beef (n=78, 22%)	Southern Beef (n=126, 36%)	Sheep/Lamb (n=145, 42%)	Total: (n=349)
More Beef from Pastures		7%	21%	5%	13%
Prime Time/Making More from Merinos		-	1%	13%	5%
PIRD's/Producer Research Support		1%	-	2%	1%
EDGE/EDGENetwork workshops		49%	45%	55%	49%
Cost of Production		-	-	-	-
Non MLA Events		-	1%	2%	1%
Changed:		57%	65%	74%	67%
Did Not Change		43%	35%	26%	33%
Total:		100%	100%	100%	100%

(Tier 2 Sample Base **n=349**)

(refer data tables 3-10)

4.2.3 Management Changes as a Result of Course Attendance

The KPI 2006 Survey asked producers if they had changed any of their management practices as a **direct** result of participating in the specific course or program(s) they indicated they had attended. This approach aimed to **link change** directly with specific **course attendance**.

- ❑ **PIRD's** and EDGENetwork appear to have the most influence on change with **72%** and 69% respectively of participants indicating that the program motivated them to adopt new management practices and/or implement changes to existing practices.

Table 20: Management Practice Change by Course/Program

MLA classifications:	Course/Program	Course Participants (n=349)	% of Course Participants who Changed Management Practices
	More Beef from Pastures	n=85	44%
	Prime Time/Making More from Merinos	n=70	47%
	PIRD's/Producer Research Support	n=32	72%
	EDGE/EDGENetwork workshops	n=205	69%
	Cost of Production	n=11	30%

(Tier 2 Sample Base **n=349**)

(*Note: The participants represented who did not change management practices as a result of attending the specified program, did also not change as a result of attending any other course or program. Some specified course participants changed management practices as a result of also attending other courses, refer to tables for details).

These figures represent only a minor shift in the overall level of management practice change from the 2005 survey, increasing only **2%** from **65%** in 2005 to **67%** in 2006.

(refer data tables 3-10)

4.2.4 Management Changes Compared with 2005 EDGE/More Beef from Pastures Survey

Table 21: Management Change 2005 V's 2006

MLA classifications:	Course/Program	2005 EDGE & More Beef from Pastures Outcomes	2006 Course/Program Outcomes
		Changed Management Practices	Changed Management Practices
	More Beef from Pastures	37%	44%
	EDGE	78%	69%

(2005 EDGE & More Beef from Pastures Sample Base **n=300**, 2006 Tier 2 Sample Base **n=349**)

4.2.5 Management Changes of Extension Program Attendees by Producer Segment

Table 22: Management Change by Northern Beef Producers

		Northern Beef Producers (<i>n</i>=78)	
MLA classifications:	Course/Program	Course Participants	Course Participants Who Changed Management Practices
	PIRD's	<i>n</i> =8*	75%
	EDGE/EDGENetwork workshops	<i>n</i> =69	54%

Table 23: Management Change by Southern Beef Producers

		Southern Beef Producers (<i>n</i>=126)	
MLA classifications:	Course/Program	Course Participants	Course Participants Who Changed Management Practices
	More Beef from Pastures	<i>n</i> =76	39%
	PIRD's	<i>n</i> =6*	67%
	EDGE/EDGENetwork workshops	<i>n</i> =60	74%
	Cost of Production	<i>n</i> =4*	47%

Table 24: Management Change by Southern Sheep/Lamb Producers

		Sheep/Lamb Producers (<i>n</i>=145)	
MLA classifications:	Course/Program	Course Participants	Course Participants Who Changed Management Practices
	Prime Time	<i>n</i> =67	45%
	PIRD's	<i>n</i> =18	72%
	EDGE	<i>n</i> =76	75%
	Cost of Production	<i>n</i> =7*	14%

(refer data tables 3-10)

4.2.6 Management Changes by Psychographic Profile

The proportion of each segment which changed management practices or adopted new management practices as a result of participating in MLA courses/programs was as follows:

- ❑ **69% of Innovators** (15% of the sample)
 - ❑ **70% of Early Adopters** (14% of the sample)
 - ❑ **69% of Early Majority** (41% of the sample)
 - ❑ **63% of Late Majority** (26% of the sample)
 - ❑ **44% of Laggards** (4% of sample)
- ❑ Evaluating the level of change or adoption using the psychographic profile highlights the profile of course participants and the need to recognise the time required to implement change.
- ❑ A total of **69%** of Innovators implemented management change and 40% of Innovators implemented management change as a result of attending an EDGE workshop. Conversely of all respondents attending EDGE courses, 69% have implemented a management change, of these 11% are Innovators.

Table 25: Management Change by Psychographic Segment

MLA Course/Program classifications:	Sample Segments					
	Total Sample (n=349, 100%)	Innovators (n=52, 15%)	Early Adopters (n=50, 14%)	Early Majority (n=144, 41%)	Late Majority (n=89, 26%)	Laggards (n=14, 4%)
More Beef from Pastures	44% 100%	22% 23%	18% 21%	14% 42%	6% 13%	5% 1%
Prime Time/Making More from Merinos	47% 100%	6% 19%	3% 9%	6% 48%	2% 14%	14% 10%
PIRD's/producer Research Support	72% 100%	1% 17%	1% 17%	1% 35%	1% 30%	-
EDGE/EDGENetwork workshops	69% 100%	40% 11%	51% 16%	52% 43%	52% 30%	10% -
Cost Of Production	30%	-	-	-	-	-
Change:	67%	69%	70%	69%	63%	44%
No Change:	33%	31%	30%	31%	37%	66%
Total:	100%	100%	100%	100%	100%	100%

(Tier 2 Sample Base n=349)

(refer data table 4).

4.2.7 Types of Management Practice Changes after Attending MLA Courses or Programs

Table 26: 2006 Survey % of Course Attendees who Changed Management Practices

Management Practice:	PIRD's	EDGE nfi	Prime Time	More Beef from Pastures	Cost of Production	Wean More Lambs	Pro graze	Beef Cheque	Grazing Land Management	Nutrition Edge	Total:
Grazing Management	22%	8%	16%	45%	-	18%	63%	67%	50%	14%	31%
Reproductive Management	9%	9%	5%	-	-	11%	11%	9%	-	3%	4%
Supplementary feeding and Nutrition	30%	33%	24%	17%	-	33%	14%	-	-	64%	14%
Calving, lambing or weaning times	9%	-	25%	8%	-	39%	14%	24%	-	3%	11%
Management or preparation of sires	9%	9%	-	-	-	7%	-	5%	-	-	2%
Genetic Selection	4%	23%	3%	9%	-	-	-	5%	-	-	3%
Natural Resource Management	-	9%	5%	1%	-	-	-	5%	25%	-	1%
Animal Health Practices	-	17%	8%	10%	-	11%	-	9%	-	3%	5%
Pasture Management	-	17%	7%	40%	-	8%	47%	20%	25%	22%	18%
Marketing & Finance	4%	18%	5%	-	50%	7%	5%	17%	-	3%	8%
Chemical & Fertiliser	-	13%	-	1%	-	7%	4%	14%	-	-	3%

As the 2005 survey also showed, Grazing management, Supplementary feeding & Nutrition practices and Pasture management were the main management practices where producers have made changes.

4.2.8 More Beef from Pastures Course Influence

In the KPI 2006 Survey the More Beef from Pastures awareness and management practice change has been followed with a question aimed at identifying which element of the program most influenced producers to change their management practices.

- **Of the 44% of More Beef from Pastures** course participants who made changes to management practices, **64%** of producers indicated the **course workshop** had the most influence on them changing management practices.

Table 27: Influence of MBfP Course Components

More Beef from Pastures Course Components:	2006 More Beef from Pastures Course Attendees who made changes
Workshop	64%
Manual (CD Rom)	20%
Other	37%

Other influences on **More Beef from Pastures** course participants who instigated change included:

"factors relative to profitability"

"discussions with others that attended and discussions with the stall holders".

"hearing from successful farmers"

"course reaffirmed my practices"

"the guest speaker"

"did the course recently, difficult to say"

"the other producers showed that it worked"

"can't say, have made so many changes at present, trying to upgrade. Honestly couldn't say what influenced my change"

"the matching pasture to beef section of the course"

"combination of everything, nothing in particular. Was already going down that track and they just gave me that extra push"

"talking with people, real producers"

"we have not really changed anything"

"reaffirmed what they were doing also"

"The pasture Utilisation"

"the program that shows how to work out profit and loss and how to achieve that"

"nothing from the courses that made me change my practices, I know my grasses and am an expert myself. We are keeping on as we are" (**refer to appended survey data tables Tier 2**

Weighted

MLA_All_Courses_06V2.doc)

Conclusions and Recommendations

4.3 Conclusions

The objective of the KPI Survey is to evaluate the performance of the LPI Unit and the level of awareness of courses being promoted, and the adoption of the changes being advocated within these programs. LPI also strives to increase the level of participation within these courses, a function of awareness and course content.

The LPI communication strategies aimed at reaching producers have had a significant impact on increasing the level of awareness amongst the target producer segments.

Awareness of MLA courses has risen overall by **14%** since the 2005 LPI Survey, this increase in overall course awareness is apparent in each of the producer segments.

- ❑ Overall, **87%** of all livestock producers surveyed recalled one or more of the MLA Courses or Program(s) mentioned, this represents a total **increase of 14%** from **73%** in 2005.
- ❑ **13%** of respondents were unaware of any MLA Courses or Program(s). This appears to be significantly fewer than the levels in 2005 which were as high as 31% for Northern Beef, 27% for Southern Beef and 19% for Southern Sheep.
- ❑ **79%** of those respondents interviewed in the Tier 1 sample ($n=204$) indicated they were MLA Members, **90%** of these members were aware of one or more MLA courses or program(s), this appears to represent an **increase of 10%** since the 2005 survey.

Improving on this overall level of awareness will be difficult as it is likely to be close to saturation point. Communication work can still be done to raise the level of aided and unaided awareness of individual programs so that producers are able to confidently recall course and program names as well as make the association with MLA without prompting.

Adoption rates have risen slightly overall, **67%** of livestock producers surveyed in 2006 indicated they had implemented management practice changes as a result of participating in an MLA course or program. This is consistent with 65% of producers identified in the 2005 LPI Survey.

- ❑ Attendance at an **EDGE network** workshop in the 12 months leading up to the 2006 survey motivated **69%** of participants to change management practices
- ❑ **44%** of **More Beef from Pastures** program participants from the 2006 survey have implemented change
- ❑ Other courses not previously evaluated have instigated management change since the 2005 survey, **PIRD's** has motivated **72%** of participants to change management practices, **Prime Time 47%** and **Cost of Production 30%**.
- ❑ **25%** of program participants made changes to **Grazing management** practices, **23%** to **Supplementary feeding & Nutrition** practices and **20%** to **Pasture management**.

The process of conducting this survey highlighted the variation in adoption rates between recent course participants and those who have had time to implement change. This perspective is critical when we look at the profile of course participants, some of whom had participated in courses up to 6 years prior to the 2005 survey. This highlights the fact that the growing number of recent course participants, when surveyed, may retard the rate of adoption findings as a percentage of course participants overall.

Anecdotal evidence suggests that some livestock producers make changes to their enterprises periodically and then sit back and enjoy the fruits of their labour, rather than changing on a continuous basis. External factors such as drought also have been shown to interrupt the adoption process due to the necessary change of focus to higher priorities.

Clearly producers need time to implement change. Understanding how long it takes producers to implement change following participation in extension programs may play a role in the strategic management of such programs.

- ❑ A significant proportion of course attendees fall into the Early Majority **41%**, Late Majority **26%** and Laggard **4%** profile. It is apparent that this element of course participants are likely to be slower when implementing change, possibly retarding the rate of adoption as courses mature.

4.4 Recommendations

The survey in 2005 discussed improving course content and embracing alternative communication channels to create a repeat impact for the messages MLA is communicating to producers.

Producer awareness levels of MLA courses and programs indicate that these strategies appear to be working and should remain.

It is apparent from undertaking the KPI 2006 Survey that the time taken for producers to adopt management change will have a significant impact on the ongoing KPI evaluation process.

- ❑ This change interval needs to be more clearly understood.
- ❑ It is also clear that the time taken by producers to implement change will impact on the overall level of adoption when evaluated as a percentage of course attendees.

This anomaly can be addressed a number of ways when measuring adoption or management change. It could be measured:

- ❑ As a % of all course attendees (aggregated sample) and graphed over time.
- ❑ As a rolling 12 month % (sample of attendees segmented by year of attendance and repeated). Graphed annually this will identify the rate of adoption over time.
- ❑ Possibly the simplest method will be as a % of all producers (subject to definition) and graphed over time. This can be done as a weighted analysis of course participants relative to the overall producer population.

To achieve a continuing increase in management change amongst course attendees MLA must continue to focus on:

- ❑ Course content quality and the **impact of the messages** contained in the courses being offered. Producers indicated they respond to credible experts presenting the information and are particularly impressed when real producers with experience are there to support the presented material
- ❑ In order to maintain and improve the level of adoption, LPI should look for ways of encouraging producers to accept change.
- ❑ 52% of surveyed producers have attended more than one MLA course/program. MLA must harness this to ensure these potential course participants are continually updated with new course information in a bid to continue exposing them to the new management practices being promoted within each course. Clearly the membership drive and recruitment initiatives support the effectiveness of ongoing producer communication which is at least as important as going after bona fide members to improve course participation.
- ❑ **Promotion of courses/programs to non-members** is also likely to continue to attract reasonable levels of support. It is evident from the survey that a large proportion of livestock producers already believe they are MLA Members, this figure of 78% is regarded as grossly overstating actual membership levels, however it does highlight the perception of producers who believe they are members and appear to behave as members. If these **quasi** members were to receive more course information it is likely they could be converted to actual members

and benefit from that status and the communication afforded them. Whilst focussing on these initiatives has delivered results, many of the challenges presented above can be addressed internally through the careful management and analysis of a program participants database.

- ❑ A database initiative is under way. The files merged by Axiom to generate the 2005 sample and the 2006 sample will be included in a suitable database format. This initiative should encompass **all** MLA programs if their impact is to be evaluated using a sampling technique in the future.
- ❑ The format of this database is also critical to the ongoing viability of maintaining it. Axiom recommends that the database records an incidence of each person's participation in various extension programs to help avoid tedious contact maintenance and allowing most of the input work to focus on adding new participant records.
- ❑ Follow up surveys or communication can be used to track change and with the inclusion of incident dates, timelines can be determined for those changes recorded. **With an easy-to-access database of** known course participants it may also be possible to implement a more efficient method of tracking management change. Randomly constructed web based surveys or self-completion surveys undertaken to collect details of management changes can be more accurately extrapolated when total participant population data is available. With this approach, the risk of introducing unknown response bias may be able to be mitigated by determining quotas for certain types of producers to ensure adequate responses by spontaneous follow-up techniques where required.

This database initiative will add another analytical dimension to LPI's activities that can be used to provide much of the ongoing analysis MLA will need to promote courses and programs and measure their impact. For example:

- ❑ MLA will know at any given time the proportion of producers the course activity is reaching, with regular contact or follow up surveys of participants feeding the database a longitudinal tracking process will be able to measure course participation and plot the time it takes to implement change.
- ❑ This type of information will also assist in determining and managing the lifecycle of individual MLA courses.

The evaluation of LPI through KPI evaluation can continue to be undertaken using survey techniques as required, however the level of accuracy and the segmentation options for survey results will be improved if population information is provided in greater detail. Not only will a more comprehensive database of course participants improve the basis for sample design, it will also reduce the impact of survey fatigue that small populations suffer from.

- ❑ The methodology for future surveys is likely to remain with a telephone interview platform until such time as a suitable sample of email contacts can be established to move to the more efficient method of online self-completion surveying. This technique will work best in association with an established contact database that can be used to pre populate questions.

5 Appendices

The following appendices are attached in *Axiom_KPI_2006_SURVEY_Report&DataTablesV2.zip*

5.1 Appendix 1 Main data file(s)

Word files containing SurveyCraft tables of the survey dataset. Various analysis perspectives have been required and due to the volume and complexity of the data several different data processing initiatives have been undertaken.

These have been included in the attached files.

- ☐ Tier 1 MLA_Awareness_06V2
- ☐ Tier 2 Weighted MLA_All_Courses_06V2

Note: Data tables include filtered and cross tabulated information, if additional cross tabs or filters are required please contact Axiom Research.

5.2 Appendix 2 Questionnaire

The original questionnaire designed in consultation with MLA and incorporating much of the same profiling and segmentation protocols used in the 2005 LPI surveys to ensure continuity of data and population representation.

MLA TARGET PRODUCER 2006 KPI AWARENESS & ADOPTION RESEARCH QUESTIONNAIRE V.7

INTRODUCTION

Good evening, my name is _____ from Axiom Research in Sydney.

I am calling on behalf of **Meat and Livestock Australia** to ask you some questions regarding your awareness of programs that MLA conduct to assist producers in their operations. Your input will help ensure that the right programs are being developed to meet both yours and the industry's needs.

IF FIRST NAME LISTED ASK:

INTRO Q#1. Am I speaking with (*insert contact name*)? **IF YES** GO TO INTRO #2, **IF NO** ASK May I speak with (*insert contact name*)? **IF YES** reintroduce to main contact and follow from INTRO#1, **if NO** GO TO INTRO #2

IF NO FIRST NAME LISTED ASK:

INTRO Q#2. Are you able to answer questions about livestock production on the property?
if NO ARRANGE CALL BACK.

REINTRODUCE AS NECESSARY

All responses are held in the strictest of confidence and are used for statistical purposes only.

INTRO Q#3. Are you able to help us by participating in our survey this evening?

YES	01	CONTINUE 'Thanks for your help, your time is appreciated'.
NO	02	ASK IF ANOTHER TIME IS MORE SUITABLE. ARRANGE CALL BACK OTHERWISE THANK & CLOSE

SC.Q1. Interviewer to insert postcode / regional location of the property from contact list?

(DP to link with master region code frame to manage location quota)

POSTCODE	Nth Beef	Sth Beef	Sth Sheep	State Tag:

(DP note: check postcode with regional definitions and rainfall zones for quota management. livestock type will also need to be included in quota).

SC.Q2. FIRSTLY CAN I PLEASE ASK SOME PROFILING QUESTIONS, WHAT IS THE **TOTAL AREA** OF YOUR PROPERTY, INCLUDING ALL LEASED LAND AND ANY UNUSED LAND?

(Interviewer note: check whether the answer is acres or hectares)

250 Acres = 100 Hectares / 1 Hectare = 2.5 Acres / 100 Acres = 40 Hectares

ACRES		IF LESS THAN 250 ACRES, THANK AND CLOSE
	OR	
HECTARES		IF LESS THAN 100 HECTARES, THANK AND CLOSE

SC.Q3. HAVE YOU **REGISTERED** AS A **MEMBER** OF MEAT AND LIVESTOCK AUSTRALIA?

RECORD RESPONSE BELOW

Yes (Member)	1
No (Non Member)	2
Don't know	99

Q.SC4. *Interviewer note: check contact database source to determine question stream*

FARMbase (Random sample of pop.)	1	ASK Section 1,2 & 4	n=205
EDGE/MBfP/PIRDS/PRIME TIME/COST OF PRODUCTION	2	ASK Section 1,3 & 4	n=370

(DP Note: Course attendees will be segmented by course to provide a base for evaluation by course of management practice change – quotas of n=50 apply to each course. This quota does not include other course mentions not specified above).

INDUSTRY SEGMENTATION (SAME METHOD AS LPI 2005, except for goats)**SECTION 1: ASK ALL**

Q1.1 IN THE LAST FINANCIAL YEAR, ROUGHLY WHAT PERCENTAGE OF YOUR TOTAL GROSS FARM INCOME, THAT IS, ONLY INCOME FROM YOUR FARM, CAME FROM THE FOLLOWING ACTIVITIES?

READ OUT & RECORD

Beef cattle	%	IF 10% OR MORE, CLASSIFY AS "BEEF".
Wool	%	IF ADD TO 10% OR MORE, CLASSIFY AS "SHEEP".
Lambs	%	
Mutton	%	
Farmed goats	%	IF ANY INCOME, CLASSIFY AS "GOAT".
Feral goats	%	
Dairy	%	IF THESE ADD TO 95% OR MORE OF INCOME, THANK AND CLOSE
Winter cereal crops (Wheat, Barley, Oats, Triticale)	%	
Other crops (SPECIFY)	%	
TOTAL	100%	

(Interviewer & DP note: This filter will determine how the respondent is classified, i.e. as a beef producer or as a sheep producer. The survey will also attempt to capture a sample of goat producers as the Axiom database has increased its contact numbers for goat breeders)

AWARENESS OF MLA PROGRAMS

SECTION 2: ASK TIER 1 SAMPLE ONLY (*RANDOM SAMPLE OF TARGETED PRODUCERS n=205*)

Q2.1 MEAT & LIVESTOCK AUSTRALIA (MLA) ORGANISES AND RUNS A RANGE OF PROGRAMS FOR BEEF, SHEEP, LAMB AND GOAT PRODUCERS. COULD YOU PLEASE TELL ME WHICH MLA PROGRAMS YOU ARE **AWARE** OF?

(INTERVIEWER: CHECK ACTUAL COURSE NAME TO CONFIRM COURSE CODE FROM ATTACHED LIST OF MLA COURSES AND PROGRAMS – DO NOT RECORD ACTUAL COURSE OR PROGRAM ONLY CORRESPONDING COURSE CODE.

RECORD FIRST MENTIONED UNDER Q2.1

AND ALL OTHER MENTIONS UNDER Q2.2 DO NOT READ OUT OR PROMPT AT THIS STAGE.

Q2.2 ... ANY OTHERS?

(If not in MLA course and programs list Please Specify)

Q2.3 I AM GOING TO READ OUT SOME OTHER MLA COURSES & PROGRAMS TO YOU. HAVE YOU HEARD OF...

(INTERVIEWER: READ OUT FULL COURSE CODE DESCRIPTION (IN BRACKETS), FROM TABLE BELOW. READ OUT ONLY THOSE MLA COURSE CODES NOT ALREADY RECALLED IN Q2.1 and Q2.2)?

OR

PROMPT FOR ALL SAMPLE: (read out)

WHAT ABOUT 'PRIME TIME' or 'MAKING MORE FROM MERINO'S FORUM'; 'MORE BEEF from PASTURES'; 'PIRD'S or DEMONSTRATION TRIAL'S', 'PRODUCER RESEARCH SUPPORT'; 'EDGE' or 'EDGE Network' and 'COST OF PRODUCTION WORKSHOPS'.

AND

Also read out these specific EDGE or EDGE Network courses (code 02) if respondent is from state identified:

PROMPT, IF Southern WA or TAS: (read out)

WHAT ABOUT 'WEAN MORE LAMBS' & 'PROGRAZE'.

PROMPT, IF VIC or SA: (read out)

WHAT ABOUT 'WEAN MORE LAMBS', 'PROGRAZE', 'BEEF CHEQUE' & 'LAMB CHEQUE'.

PROMPT, IF QLD, NT, or Northern WA: (read out)

WHAT ABOUT 'GRAZING LAND MANAGEMENT or GLM' & 'NUTRITION EDGE'.

Awareness:			Unaided		Aided
MLA	Course	Code	Q2.1 First Mention	Q2.2 Other Mentions	Q2.3 Prompted
PIRDS	(PIRDS or Producer Research Support)		01	01	01
EDGE Network	(any EDGE or EDGE Network course)		02	02	02
PRIME TIME	(Prime Time or Making More from Merino's)		03	03	03
MBfP	(More Beef from Pastures Manuals and Forums)		04	04	04
COST OF PRODUCTION	(NEW – COST OF		05	05	05

PRODUCTION or Cost of Production Workshops)			
Non MLA Events (Courses conducted by organisations other than MLA where MLA contributed either course content or sponsorship)	06	06	06
OTHERS (Please Specify)	99	99	99

(DP Note: Identify for tables those respondents with first, second and nett unaided mentions then prompted, then nett total aided & unaided awareness).

(Interviewer Note: TIER 1 Respondents Go to Q9.1)

ADOPTION

SECTION 3: TIER 2 - PARTICIPANTS OF PIRDS/EDGE/MBfP/PRIME TIME/COST OF PRODUCTION PROGRAMS AND CHANGE OF MGT PRACTICES: ASK ALL MLA COURSE CONTACTS ONLY (MLA SAMPLE *n=370*)

Q3.1 MEAT & LIVESTOCK AUSTRALIA (MLA) ORGANISES AND RUNS A NETWORK OF PROGRAMS AND COURSES FOR BEEF, SHEEP AND LAMB PRODUCERS. CAN YOU CONFIRM YOU HAVE PARTICIPATED IN... (*PRE POPULATE Q3.1 WITH COURSE CODE FROM CONTACT LIST*)?

Q3.2 CAN YOU RECALL ANY OTHER MLA COURSES THAT YOU HAVE ATTENDED OR PARTICIPATED IN?
(REFER TO COURSE CODE FRAME THEN RECORD ALL OTHER COURSES MENTIONED UNDER Q3.2.
ANY OTHERS NOT INCLUDED PLEASE SPECIFY.

Q3.3 HAVE YOU CHANGED ANY OF YOUR MANAGEMENT PRACTICES OR ADOPTED ANY NEW MANAGEMENT PRACTICES AS A RESULT OF PARTICIPATING IN THE (*INSERT COURSE CODE FROM Q3.1 & THEN Q3. 2*) COURSE YOU MENTIONED?

ASK ONLY FOR THOSE PROGRAMS MENTIONED (*ask in succession for each program*)

MLA Course Codesee code frame	DP - COURSE CODE	Q3.1 Attended	Q3.2 Other Attended	Q3.3 Changed Yes No
PIRDS (PIRDS or Producer Research Support)	01	01	01	01 02
EDGE Network (any EDGE or EDGE Network course)	02	02	02	01 02
PRIME TIME (Prime Time or Making More from Merino's)	03	03	03	01 02
MBfP (More Beef from Pastures Manuals and Forums)	04	04	04	01 02
COST OF PRODUCTION (NEW - COST OF PRODUCTION or Cost of Production workshops)	05	05	05	01 02
Non MLA Events (Courses conducted by organisations other than MLA where MLA contributed either course content or sponsorship)	06	06	06	01 02
OTHERS (Please specify		99	99	01 02

(DP Note: for Q3.3 Identify for tables those respondents who made 1 change and those who made more than 1, then create a nett change field).

ASK ONLY FOR THOSE RESPONDENTS WHO ANSWERED YES (01) to Q3.3

Q3.4 WHICH PARTICULAR MANAGEMENT PRACTICES HAVE YOU CHANGED AS A RESULT OF ATTENDING THE (INSERT PROGRAM NAME FROM Q3.1 & THEN Q3.2) COURSE?

Management Practice Changes.....prompt only to clarify answer.	Q3.1 Course Name	Q3.2 Course Name
GRAZING MANAGEMENT	01	01
REPRODUCTIVE MANAGEMENT	02	02
SUPPLEMENTARY & NUTRITION PRACTICES	03	03
CALVING, LAMBING OR WEANING TIMES	04	04
MANAGEMENT OR PREPARATION OF SIRES	05	05
GENETIC SELECTION	06	06
NATURAL RESOURCE MANAGEMENT	07	07
ANIMAL HEALTH PRACTICES	08	08
PASTURE MANAGEMENT	09	09
MARKETING AND FINANCE	10	10
CHEMICAL & FERTILISER	11	11
OTHER (Please Specify)		

IF MBfP Course participant ASK Q3.5

Q3.5 AS A RESULT OF ATTENDING OR PARTICIPATING IN THE MBfP COURSE, WHICH ELEMENT OF THE MBfP COURSE MOST INFLUENCED YOU TO CHANGE MANAGEMENT PRACTICES?
Read out: THE CD MANUAL or the WORKSHOP?
Prompt with: ANY OTHERS?

Course Components:	Q3.5
MANUAL (CD Manual)	01
WORKSHOP	02
MANUAL & WORKSHOP	03
OTHER (Specify)	04

(DP to code Other).

INTERVIEWER REFERENCE MATERIAL – Where specific course names are mentioned please ensure they are recorded under their MLA Course Code, i.e. 02 EDGE Network or 01 PIRDS.

THE LIST BELOW ARE ALL MLA COURSES and PROGRAMS
INTERVIEWER CHECK LIST Q3.1 – Q3.2

PIRD's = 01	PIRD's (Producer Initiated Research & Development) or demonstration trials.
	PRS or Producer Research Support
EDGE Network = 02	Conflict resolution and negotiation
	Leadership
	Working in Groups® (WIGs)
	Farm Business Meetings
	Time Control
	BizCheck® for Meat.
	Developing the strategy
	Generating Profit and Wealth
	Working Records
	Enterprise Health Check
	Effective Pricing
	Making Business Decisions
	Grazing Land Management or GLM (<i>Nth Producers only</i>)
	Healthy Soils, Healthy Profits (<i>Towards Sustainable Grazing Workshops</i>)
	Profit from Saline Lands (<i>Towards Sustainable Grazing Workshops</i>)
	Managing Living Systems (<i>Towards Sustainable Grazing Workshops</i>)
	Weed Removers, Pasture Improvers (<i>Towards Sustainable Grazing Workshops</i>)
	Grazing Land Management (<i>Nth Producers only</i>)
	PROGRAZE® Update
	Lamb Cheque®
	Better Grazing Decisions®
	PROGRAZE®
	Beef Cheque®
	5.2.1 The Breeding EDGE (Nth Producers only)
	5.2.2 Effective Breeding (lambs)
	5.2.3 Wean More Lambs
	5.2.4 The Nutrition EDGE (Nth Producers only)
	5.2.5 Effective Breeding (beef)
	5.2.6 Money Making Mums (sheep)
	NLIS in Your Business
	The Marketing EDGE (<i>Nth Producers only</i>)
	Lean Meat Yield (prime lambs)

	Markets and Customer Needs
	Marketing Performance
	Negotiating the Sale
	Understanding Marketing
	Meat Standards Australia (MSA)
	The Selling Edge (<i>Nth Producers only</i>)
	Making the Most of Mutton
	Market Intelligence
	Marketing Strategy and Plan
	Selling Options
	BeefNet Product Knowledge
PRIME TIME = 03	Prime Time or Making More from Merino's
MBfP = 04	More Beef From Pastures (CD Manual or Forum)
COST OF PRODUCTION = 05	Cost of Production Workshops
Non MLA Events = 06 (Courses conducted by organisations other than MLA where MLA contributed either course content or sponsorship)	Sheep updates – WA
	Merino Forums – SA
	Sheepvention seminars – Vic
	Bestwool / Bestlamb groups – Vic
OTHERS = 99	

DEMOGRAPHICS**SECTION 4: TIER 1 & 2 - ASK ALL**

And finally, just a couple of demographic questions to make sure we have interviewed a representative sample of producers.

Q9.1 COULD YOU TELL ME INTO WHICH OF THE FOLLOWING AGE GROUPS YOU FALL?

READ OUT

Less than 20 years	1
21 – 30 years	2
31 – 40 years	3
41 – 50 years	4
51 – 60 years	5
Over 60 years	6
REFUSED (DO NOT READ OUT)	0

Q9.2 WHAT PERCENTAGE OF YOUR FARM DECISION MAKING WOULD YOU SAY YOU ARE RESPONSIBLE FOR, OR INVOLVED IN?

DO NOT READ OUT

Less than 10%	1
10% – 20%	2
21% – 50%	3
51% – 80%	4
81% – 100%	5
REFUSED (DO NOT READ OUT)	0

DP Note: Q9.2 TO BE CROSSTABBED WITH Q9.7 TO DETERMINE WOMENS ROLE IN THE DECISION PROCESS.

Q9.3 HAVE YOU EVER PARTICIPATED IN COLLABORATIVE RESEARCH PROGRAMS WITH UNIVERSITIES, STATE DPI, MLA, AWI, GRDC, OR SOME OTHER RESEARCH BODY?

READ OUT

Universities	1
State DPI (Dept of Agriculture)	2
MLA	3
AWI	4
GRDC	5
Other (Specify)	6
Don't know	99

Q9.4 ON AVERAGE, APPROXIMATELY HOW MANY **NEW TECHNOLOGIES** HAVE YOU **ADOPTED** OR **MANAGEMENT PRACTICES** HAVE YOU **CHANGED**, PER YEAR ACROSS YOUR BUSINESS OVER THE LAST **5-10** YEARS?

DO NOT READ OUT

None	1
1	2
2	3
3	4
4	5
>5	6
Don't know	99

Q9.5 THINKING ABOUT INFORMATION, FROM **WHAT SOURCE** DO YOU GENERALLY FIRST HEAR ABOUT MOST **NEW TECHNOLOGIES** OR **MANAGEMENT PRACTICES**? (eg. RURAL NEWSPAPERS, FARM MAGAZINES, ABC RADIO, DPI, STOCK & STATION AGENT, RURAL MERCHANT, STATE FARMER ORGANIZATION, MLA, AWI, FAMILY MEMBER, PRODUCER NETWORK OR GROUP, OTHER INDIVIDUAL PRODUCERS, WORKSHOPS OR SEMINARS, INTERNET, OTHER)?

DO NOT READ OUT

Rural Newspapers	1
Farm Magazines	2
Radio (ABC)	3
DPI	4
Livestock Agent	5
Rural Merchandise Store	6
Farmer Organisations (eg. NSWFA)	7
MLA	8
AWI	9
Family member	10
Producer Network or Group	11
Farm Consultant or Agronomist	12
Field Days or Seminars	13
Other Producers	14
Don't know	99

Q9.6 WHO OR WHAT DO YOU GENERALLY RELY ON WHEN **YOU NEED ADVICE** ABOUT HOW TO USE OR APPLY MOST NEW TECHNOLOGIES OR MANAGEMENT PRACTICES? (eg. RURAL NEWSPAPERS, FARM MAGAZINES, ABC RADIO, DPI, STOCK & STATION AGENT, RURAL MERCHANT, STATE FARMER ORGANIZATION, MLA, AWI, FAMILY MEMBER, PRODUCER NETWORK OR GROUP, OTHER INDIVIDUAL PRODUCERS, WORKSHOPS OR SEMINARS, INTERNET, OTHER)?

DO NOT READ OUT

Rural Newspapers	1
Farm Magazines	2
Radio (ABC)	3
DPI	4
Livestock Agent	5
Rural Merchandise Store	6
Farmer Organisations (eg. NSWFA)	7
MLA	8
AWI	9
Family member	10
Producer Network or Group	11
Farm Consultant or Agronomist	12
Field Days or Seminars	13
Other Producers	14
Don't know	99

Q9.7 RECORD GENDER OF RESPONDENT

DO NOT READ OUT

Male	1
Female	2

CLOSE:

THANK YOU FOR YOUR HELP. GOODBYE