

final report

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Executive Summary

Livestock Production Innovation's (LPI) Key Performance Indicator (KPI) Survey's are based on a research methodology that concentrates on the assessment of communication & research adoption performance indicators with a focus on key program streams including EDGEnetwork, Producer Demonstration Sites (PDS)/PIRDS, More Beef from Pasture (MBfP), Making More From Sheep (MMfS), Beef Up Forums, Evergraze and Cost of Production (COP) amongst the targeted producer groups of Northern Beef, Southern Beef and Sheep / Lamb.

This annual survey involves quantifying the level of **MLA activity awareness** that exists amongst a random sample of livestock producers of MLA activities (courses and programs), as well as an estimated rate of **management practice change** by producers using innovations and alternative management practices being promoted within the MLA communication and adoption programs.

In **2011** the **primary KPI's** aim to achieve:

1. At least **80%** of targeted producers* are **aware of at least one** MLA On-farm R&D communication / extension program (awareness), and that MLA members **rate their value** as at least 2 out of 3.
2. At least **10%** of targeted producers* (representing at least 15% of the production base) have engaged and **learned something of value** to their business from at least one MLA On-farm R&D communication / extension learning activity or related information.
3. At least **50%** of those producers (representing at least 7.5% of the production base) who have engaged with MLA On-farm R&D communication / extension learning activities or related information, **change management practices** as a result of their engagement (adoption).

**Producer population is defined by the % of total Northern Beef, Southern Beef and Sheep / Lamb meat producers respectively with Estimated Value of Agricultural Output (EVAO) >\$5000 (source: ABS). The KPI survey sample includes only producers with an EVAO >\$20,000 (Changed from >\$40,000 in 2009 to include smaller producers).*

The **2011 KPI survey** has been undertaken amongst a sample of MLA's targeted producer segments to a 90% confidence interval for each segment based on an overall sample of **n=577**.

The sample is split into **2 sample tiers** to address the KPI's:

Tier 1 has been constructed to evaluate **program awareness** amongst the general or **overall livestock producer population**, it included **n=305** producers randomly selected from FARMbase[®], a database of over 80,000 targeted livestock producers across Australia.

Tier 2 provides an estimate of the **level of practice change** around the use of key management practices amongst MLA's **communication and research adoption program participants**, the **2011** survey achieved a sample of **n=272** producers. This includes only producers who participated in programs since the last survey undertaken in July 2010, including attendees of EDGEnetwork (including GLM), MBfP, PDS/PIRDS, COP, MMfS, Beef Up Forums, Evergraze, Grain and Graze as well as other courses.

Note: Some of the Evergraze respondents have been drawn from participants lists from courses dating back to July 2009.

Both sample tiers include scale of production profiles for each producer segment based on industry population data provided by MLA. Based on the random sampling by enterprise size, each segment samples proportional representation reflects the population distribution for that segment. In most cases the scale of operation appears not to reflect awareness or change in management practice, however it does show that proportionally, more of the larger enterprises do tend to participate in MLA activities.

The contents of this report outline the findings of the 2011 survey as well as findings from previous KPI surveys undertaken from 2006-2010.

The empirical findings from 2011 are represented in detail in the appended data files. Please note that the cross tabs used have generated considerable material, using the reference table notations throughout the report will assist in finding additional data. The tables are in word and excel and include:

- q **MLA KPI 2011 Tables Tier 1**
- q **MLA KPI 2011 Tables Tier 2**
- q **MLA KPI 2011 Tables Combined Tier 1 & Tier 2**

Awareness - 2011 (Tier 1 n=305)

In **2011** the awareness of MLA communication and research adoption programs continues to remain high at **90%**. This is consistent with 92% recorded in 2010 and 2009. This outcome **exceeds** the **80% KPI** set by MLA.

The figures below represent the **tier 1 aided & unaided awareness** of MLA program activities as well as **aggregated awareness**.

- q **53%** of respondents indicated an unprompted or **unaided awareness** of MLA programs. This is up from 51% in 2010 and 46% in 2009 and is well above the 29% reported in 2008. This unaided awareness result is a significant measure of producers top of mind awareness of MLA activities, the 2011 outcome is a significant improvement since the poor result in 2008 and continues to trend upwards.
- q **90%** of respondents have a **prompted awareness** of one or more of the MLA programs mentioned and is consistent with 92% in 2010 and 90% in 2009. This outcome represents a significant improvement from 80% in 2008 and 78% in 2007.

Total Tier 1 Awareness: In total **90%** of targeted producers again recall one or more of the MLA programs mentioned (92% in 2010 and 2009, 85% in 2008, 84% in 2007 & 87% in 2006).

- q This sustained awareness level of **90%** continues to satisfy the **2010 KPI of 80% awareness** and is consistent with the level of awareness from previous surveys. In 2010 and 2009 92% could recall an MLA program, 2008 85% and in 2007, 84%. This increase when measured longer term represents an increase of 17% from 73% awareness recorded in 2005. The 2010 result remains at **10% higher** than the **KPI objective of 80%**.
- q **10%** of respondents were again **unaware** of any MLA programs, this is consistent with 8% in 2010 and 2009 and is significantly fewer than 15% recorded in 2008. This outcome again confirms the improvement in levels of awareness of MLA activities and programs.

MLA Membership: In 2011 **68%** of **tier 1** survey participants indicated they are MLA members, down from 77% in 2010 and 71% in 2009. In 2008 this was as high as 85%. Membership has been determined by measuring the receipt of the **Feedback** publication.

- q **97%** of **MLA members** were aware of one or more MLA activities or programs, this is consistent with 95% in 2010 and 2009 and is up on 87% in 2008. This result reflects previous findings of 93% in 2007 and 90% in the 2006 survey. This outcome highlights the advantages of membership, however it also reinforces the effectiveness of LPI communication across the non-member population.
- q **29%** of **members** indicated they had attended an MLA program, down from 37% in 2010 and 36% in 2009. This outcome is well below the 51% reported in 2008 and may reflect the fact that many members have already attended MLA activities and programs and are unlikely to participate again.

Attendance amongst targeted producers: **23%** of the **90%** of targeted producers surveyed who are **aware** of MLA programs indicated they had **attended or participated** in an MLA program. This result is well below the 33% reported in 2010 and 31% in 2009 and remains lower than the 48% reported in 2008. Overall, this equates to **21%** of all targeted tier 1 producers surveyed, and represents a fall from 31% in 2010 and 28% in 2009. This outcome is well below the 40% reported 2008.

The **value of MLA programs** to targeted producers is an evaluation introduced to the survey in 2008. This measure determines the value producers place on the communication and research adoption programs they have experience with using a simple rating out of 3, where a **rating of 0 = no value** at all and a **rating of 3 = high value** or the top rating possible.

- q Program rating results have been consistently above the 1.55 reported in 2008 and continue to **exceed the 2010 KPI of 2 out of 3**.
- q In Tier 1, **88%** of targeted producers surveyed who attended programs (23%), indicated they rated the program as **good (2) or high value (3)**, up from 85% in 2010 and still below 90% in 2009. This equates to a mean rating of **2.11** (above the KPI of 2 out of 3). This is down from 2.12 in 2010.
- q This result is comprised of **23%** of targeted producers who rated the programs they had experience with as **high value** (down from 31% in 2010 and 36% in 2009). A further **65%** as **good value** (up from 54% in 2010 and 2009), followed by **12%** as **little value** (consistent with 12% in 2010 and 8% in 2009).

In gathering this awareness data, the survey's questionnaire¹ specifically mentions Meat & Livestock Australia, and the range of activities for beef, sheep, lamb and goat producers. The questionnaire asks 'Which MLA activity' is the respondent aware of, and then probes for any additional courses.

(refer MLA KPI 2011 Tables Tier 1)

¹ Refer to appendix for questionnaire details.

Management Change - 2011 Participants (Tier 2 $n=272$)

In **2011**, **70%** of course participants implemented **management practice change** as a result of participating in any of the MLA activities or programs. This outcome is an improvement on 59% attained in 2010 and 2009 and is **20% higher** than the **2011 KPI target of 50%**.

The participant lists provided by MLA for the 2011 KPI survey included contact details for **4,310** producers who had participated in one or more of the MLA programs since July 2010. In the previous 2010 survey, 3,294 producers made up the tier 2 sample base and in the 2009 survey, 5,407 producers. Axiom note that these participant numbers only include those program participants with documented contact details including telephone numbers and postcodes.

At the conclusion of the **2011** survey interval there is now **6** years of longitudinal survey data, each year's data representing the most recent 12 months of LPI activity. The findings have been represented using 12 month data only, where trend analysis is required a rolling 12 month average² analysis should be used.

The **2011 tier 2** survey obtained a sample of $n=272$, all respondents are livestock producers who have attended an MLA activity or program within the last 12 months.

Looking at the **2011 tier 2** findings for the **12 months** of programs leading up to the 2011 survey:

- q This **practice change** result of **70%** is up from 59% in 2010 and 2009 and 61% in 2008. This jump appears to reflect the longer-term impact of the MLA activities and key practice change messages being promoted. Axiom note there are **35%** of tier 2 producers not implementing change who cite the reason for not changing practices is because they are already doing them.
 - o The highest change proportionally has been amongst participants of **PDS/PIRD's**, **70%** of participants changed management practices, up from 67% in 2010 and a significant improvement on 53% in 2009, 52% in 2008 and 51% in 2007.
 - o **68%** of producers participating in the **More Beef from Pastures** program implemented change, up from 53% in 2010 and 50% in 2009. This result represents a continual improvement from 35% reported in the 2006 survey.
 - o **Making More from Sheep** now has **68%** of participants making changes, up from 39% in 2010 and comparable with 57% in 2009 and 42% in 2008.
 - o **39%** of **Beef Up Forum** participants changed management practices, consistent with 33% in 2010 and the 2008 result of 36%. In 2009 a relatively small sample base reported a 17% change, clearly out of step with the trend amongst participants in this program.
 - o **68%** of **Evergraze** participants changed practices, up from 62% in 2010.
 - o **EDGEnetwork** activities again had fewer participants in 2011, with **69%** making changes. Low participant bases make this data unreliable however this and the previous surveys result of 87% is indicative of the significant impact EDGEnetwork has on changing in management practices.
 - o **Each of the targeted producer segments** recorded consistent rates of management change in the 2011 survey, **northern beef** recorded **54%** (up from 43% in 2010 and 2009), **southern beef** recorded **75%** (up from 70% in 2010 and 60% in 2009, a significant improvement on 52% in 2007) and **sheep / lamb** recorded **77%** (up from 59% in 2010 and 65% in 2009).
- q The overall management change outcome has again been influenced by the **northern beef producer** segment, however this years survey reported **54%** of participants making change. This now **exceeds the KPI of 50%**. Management practice change in the **southern beef** and **sheep / lamb** segments also exceeds the 2011 KPI.

The **2011 tier 2** respondents were again asked to **rate the value** of the programs they attended during 2011.

- q In tier 2, **94%** of overall targeted producers surveyed indicated they rated the courses as **good (2)** or **high value (3)**, up from 92% in 2010 and 2009, still below 98% in 2008.
- q This equates to a mean rating of **2.30** consistent with 2010 and **exceeding the KPI target of 2 out of 3**.

Of the 2011 tier 2 program participants who had changed management practices (70%), **95%** reported that the changed management practices they undertook had some **positive impact**, this is an increase from 92% in 2010 and 90% in 2009 is a considerable improvement on 71% reported in 2008.

Of these, the main **positive impacts** mentioned include:

Profitability increase, mentioned by **29%** of participants is the main positive outcome, this is up from 18% in 2010 and 25% in 2009 and is a substantial increase from 9% reported in 2008.

² Refer to PowerPoint summary included in report package.

20% identified **better herd management** as the main positive outcome, up from 6% in 2010 and driven within MMfS and MBfP.

19% said **increased productivity**, now up from 6% in 2010 and 11% in 2009 it is on par with 17% reported in 2008. This improvement has been driven within PIRD's and MBfP.

The 2011 survey also identified a range of **issues preventing management change** amongst **30%** of program participants, these include:

- q A significant contributing factor includes **33%** who indicated they felt they were '**already doing**' the management practices described. This is down from 35% in 2010 and 44% in 2009 and 2008. This result highlights the uptake of the key messages and management practices being promoted to producers.
- q **6%** said they were **still thinking about it**, fewer than 12% in 2010, 9% in 2009 and 11% in 2008.
- q **12%** indicated they were **doing OK** without the help of MLA, this was significant in **northern and southern beef** where **15%** felt they were doing OK without MLA.
- q **Drought conditions** no longer appear to be a preventative excuse with as few as **1%** indicating drought was preventing them from implementing change, this is far fewer than 6% in 2010 and 7% in 2009 and 2008. However this does represent a dramatic decrease from 16% in 2007 when drought was covering large areas of the country.

(refer MLA KPI 2011 Tables Tier 2)

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1 Background

Meat & Livestock Australia (MLA) is responsible for communication and research adoption programs designed to improve the profitability and sustainability of the Australian red meat industry.

Previous evaluations of the performance of the LPI communication and research adoption programs have been undertaken using a quantitative sample design and telephone questionnaire. The **KPI 2011** survey provides 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 **practice change** that recognises the innovations and management practices being promoted within established communication and research adoption programs.

MLA has contracted Axiom Research (Axiom) since 2005 to undertake market research to measure progress against these primary objectives. These objectives have been translated into specific **Key Performance Indicators (KPI's)** and apply across each of the targeted producer segments including, **Northern Beef, Southern Beef and Southern Sheep/Lamb** producers.

Axiom's research and survey activity in the rural sector is underpinned by FARMbase[®] (a database containing over 80,000 livestock producers across Australia). This is Axiom's own well segmented database of Australia's primary industry participants.

In **2011** Axiom conducted a **telephone survey** amongst a sample of **n=577** targeted producers, using a **2 tiered** sample approach to satisfy overall industry **awareness** as well as the rate of participant **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 2 producer tiers, also including northern and southern beef producer and southern sheep and/or lamb producer segments. The sample aims to represent all MLA targeted livestock producers as well as those producers who have actually participated in MLA programs.

- q **Tier 1** was constructed to evaluate **program awareness** amongst the **general** or overall **livestock producer population**, it included **n=305** producers randomly selected from FARMbase[®], to represent the overall livestock industry's awareness of the MLA communication and research adoption programs.
- q **Tier 2** provides a measure of the **level of adoption** of management practices amongst MLA's **program participants**. For **2011** the survey obtained a sample of **n=272** producers. This includes only producers who participated in programs since the last survey undertaken in July 2010, including attendees of EDGenetwork (MSA Beefing up business/performance, Beef Cheque, Prograze & GLM), More Beef from Pastures, PDS/PIRDS, Making More from Sheep, Beef Up Forums, Evergraze, COP and others from July 2010 to June 2011.

2 Project Objectives

Since 2006 the KPI surveys have been undertaken with a brief to provide the current level of program awareness and level of management change or adoption of knowledge and practices using an efficient survey methodology.

The project specifically aimed to measure Livestock Production Innovation's achievements towards the annual Key Performance Indicators (KPI's).

In **2011** the MLA's annual On-Farm Communication and Research Adoption (CPA) KPI's were to ensure that:

1. At least **80%** of targeted producers are aware of at least one MLA On-farm R&D communication / extension program, and MLA members rate their value as at least 2 out of 3 (Tier 1 Sample).
2. At least **10%** of targeted producers (representing at least 15% of the production base) have engaged and learned something of value to their business from at least one MLA On-farm R&D communication / extension learning activity or related information (Tier 1 Sample).
3. At least **50%** of those producers (representing at least 7.5% of the production base) who have engaged with MLA On-farm R&D communication / extension learning activities or related information, **change practices** as a result of their engagement (Tier 2 Sample).

The underlying objective of the KPI survey is to longitudinally evaluate the impact of MLA CRA investment on maintaining producer awareness, ensuring the programs delivery value, and are motivating producer management change.

3 Methodology and Sample

Axiom has consistently followed the sampling protocols established in previous KPI survey's to construct a segmented sample of targeted livestock producers. The survey has been undertaken using 2 sample tiers and measures the KPI's relevant to producer segments within each sample tier.

1. **Tier 1 Sample (n=305):** Evaluates **awareness** of MLA 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 sample n=305*)
2. **Tier 2 Sample (n=272):** Evaluates short-term **management practice changes** amongst a sample of producers who are participants from one or more of the MLA programs since July 2010. These contacts were drawn from MLA's own databases of **program participants** from all MLA program or course groups undertaken from July 2010 to June 2011.
(*MLA participant sample - target sample n=280*)

Based on this approach the project had two critical elements, the first is the detailed sample construction that represents the wider producer population and program participants as well as 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 Computer Assisted Telephone Interviewing (CATI) methodology, telephone interviewing (field-work) was undertaken by Ekas/Interviewing Australia (Axiom's preferred supplier of telephone field-work) with their senior analysts also undertaking 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.

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:

- q Producer segments – northern beef, southern beef and southern sheep / lamb
 - o Included in the random sample quota were producer locations (High Rainfall, Wheat/Sheep, & Pastoral zones) representing the same production regions as in previous KPI surveys. This regional sample dimension ensures that producers are not inadvertently drawn from one region and avoiding any sample bias that may also result.
- q MLA membership
- q Farm size (hectares)
- q EVAO of greater than \$20,000 (value of agricultural output or revenue). Changed from \$40,000 in 2009 to prevent the exclusion of smaller livestock producers.

The detailed data tables generated (appended to the report) were collated to represent the findings by producer segment, age, farm size, scale, membership status and for activity participants by MLA activities attended.

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 1: 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
Sheep & Lamb 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 producers³	All goat producers in New South Wales, Victoria, South Australia, southern Western Australia and Tasmania that are producing goats for the red meat industry.

In previous KPI survey's the tier 1 sample has been drawn from only these producer segments, this approach has been repeated for the **KPI 2011 survey** to ensure the findings directly reflect the changes for each targeted producer segment.

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

Table 2: FARMbase[®] Sample Profile (Available Contact Counts July 2011)

ANZIC Type:	Grain Sheep & Beef	Sheep & Beef	Sheep	Beef	TOTAL:
TOTALS:	21,820	8,949	10,406	33,018	74,193

This producer profile from FARMbase is based on ABS industry definitions. This profile excludes those livestock contacts that do not comply with MLA target producer specifications.

In order to qualify for one of the three MLA producer 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 enterprise⁴.

Table 3: Sample Profile by Target Industry Segment

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**.

Producer Segment:	Tier 1: FARMbase Contacts		Tier 2: MLA Course Contacts	
	Awareness		Adoption/Management Change	
Northern Beef	<i>n=90</i>	<i>n=91</i>	<i>n=90</i>	<i>n=72</i>
Southern Beef	<i>n=100</i>	<i>n=100</i>	<i>n=112</i>	<i>n=102</i>
Sheep/Lamb	<i>n=100</i>	<i>n=113</i>	<i>n=78</i>	<i>n=98</i>
Goats	<i>n=0</i>	<i>n=5</i>	<i>n=18</i>	<i>n=6</i>
	<i>n=305</i>	<i>n=305</i>	<i>n=280</i>	<i>n=272</i>

The **Tier 1** (Awareness) sample target of *n=305* and **Tier 2** (Management practice change short-term) sample target of *n=280* has been determined using a minimum sample requirement of *n=50* for each industry segment (this sample base has, where possible, also been applied to each course segment within the overall quota construct), this is a minimum

³ A very small sample of goat producers was obtained, they appear in the tables as a separate enterprise type.

⁴ Refer to the questionnaire Section 1: Q1.

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 the overall sample $n=16$ producers were also running goats, these respondents have been included in their primary segment as well as responding to goat questions. In tier 1 in 2011 $n=10$ respondents are involved in goat production ($n=5$ exclusively), with a mean herd size of 1,006 animals (up considerably from 463 animals in 2010).

Table 4: Sample Profile by Livestock Numbers – Tier 1 & Tier 2

	Northern Beef			
Breeding Cow Segments: <i>(Note northern beef scale different from southern beef)</i>	Total Producer Base (ABS 2009) N=10,687	Total Sample n=163	Tier 1 n=90	Tier 2 n=72
Very Small (<100)	N=2,628 (25%)	n=14 (9%)	n=6 (7%)	n=8 (11%)
Small (100-400)	N=3,443 (32%)	n=40 (24%)	n=21 (23%)	n=19 (26%)
Medium (400-1600)	N=2,823 (26%)	n=62 (38%)	n=33 (36%)	n=25 (35%)
Large (1600-5400)	N=1,395 (13%)	n=27 (17%)	n=16 (18%)	n=11 (15%)
Very Large (>5400)	N=398 (4%)	n=20 (12%)	n=15 (16%)	n=5 (7%)
Mean Herd Size (all animals)	1,380	4,045	4,506	3,462
Total Herd Size (all animals)	14,750,000	659,285	410,030	249,255

The northern beef sample equals 1.53% of producers and represents 4.47% of the ABS estimate of total herd size for the region, the sample distribution by herd size represents larger producers. This is largely based on the revised min EVAO screener filter of \$20,000.

	Southern Beef			
Breeding Cow Segments: <i>(Note southern beef scale different from northern beef)</i>	⁵ Total Producer Base (ABS 2009) N=30,534	Total Sample n=202	Tier 1 n=100	Tier 2 n=102
Very Small (<100)	N=10,166 (33%)	n=58 (29%)	n=44 (44%)	n=14 (14%)
Small (100-200)	N=13,699 (44%)	n=44 (22%)	n=19 (19%)	n=25 (24%)
Medium (200-400)		n=52 (26%)	n=19 (19%)	n=33 (32%)
Large (400-800)	N=4,594 (15%)	n=27 (13%)	n=11 (11%)	n=16 (15%)
Very Large (>800)	N=2,075 (8%)	n=21 (10%)	n=7 (7%)	n=14 (14%)
Mean Herd Size (all animals)	430	645	482	805
Total Herd Size (all animals)	13,156,000	130,319	48,209	82,110

The southern beef sample of 0.66% of producers represents 0.99% of the ABS estimate of total herd size for the region, this sample predominantly represents the medium sized producers.

⁵ Profiles will be adjusted when the ABS 2010 data becomes available, expected before the 2012 KPI survey.

	Sheep/Lamb			
Turn Off Segments: <i>(Note code frame based on lambs for slaughter)</i>	⁶ Total Producer Base (ABS 2009) N=23,039	Total Sample n=211	Tier 1 n=113	Tier 2 n=98
Very Small (<200)	N=5,553 (24%)	n=38 (18%)	n=29 (26%)	n=9 (9%)
Small (200-500)	N=6,516 (28%)	n=38 (18%)	n=22 (19%)	n=16 (16%)
Medium (500-1000)	N=6,161 (27%)	n=40 (19%)	n=22 (19%)	n=18 (18%)
Large (1000-2000)	N=3,293 (14%)	n=47 (22%)	n=20 (18%)	n=27 (27%)
Very Large (>2000)	N=1,516 (7%)	n=48 (23%)	n=20 (18%)	n=28 (28%)
Mean lamb turn-off numbers	352	1,371	1192 lambs	1,577 lambs
Sample lamb turn-off numbers	81,200,000	289,246	134,676 lambs	154,570 lambs

Note: Sheep population comparison is based on MLA/ABS lamb and mutton turn-off numbers.

The southern sheep/lamb sample of 0.92% of producers represents 0.35% of the ABS estimate of total lamb production for this region, the sample also represents larger producers based on the revised min EVAO screener filter of \$20,000.

The sample distribution for both sample tiers by producer population for herd and flock size is remarkably consistent proportionally with MLA’s industry profile data with the exception of larger producers who are proportionally over represented in the sample. This confirms that analysis of the survey findings by segment scale will reflect actual population distribution with a skew towards larger producers.

In Tier 2 this is a direct result of larger producers attending MLA activities, in Tier 1 it is a function of the FARMbase database (does not contain as many smaller producers) and sample response rates.

Mean herd and flock sizes in each producer segment provide confidence in the data’s representation of management change amongst a representative proportion of the total beef producing herd and lamb producing flock.

Table 5: Available Program Participant Contacts (Source MLA)

MLA Course/Program classifications:	Course Participants List July 2008 – June 2009 (N=5,407)	2009 Weighted Sample as % of Course Participants	Course Participants List July 2009 – June 2010 (N=3,294)	2010 Weighted Sample as % of Course Participants	Course Participants List July 2010 – June 2011 (N=4,310)	2010 Weighted Sample as % of Course Participants
More Beef from Pastures	N=724	13%	N=241	7%	N=811	19%
PDS/PIRD’s	N=1,190	22%	N=209	6%	N=315	7%
EDGEnetwork	N=1,791	33%	N=117	4%	N=175	4%
Beef Up Forums	N=336	6%	N=607	18%	N=306	7%
Making More from Sheep	N=1,546	29%	N=649	20%	N=1,265	29%
Evergraze	N=336	6%	N=1,439	44%	N=1,438	33%

The percentage distribution shown here is based on weighted program participants, the actual sample of course participants has been structured to provide a representative sample by course. This means that where participant numbers are low a valid sample has been obtained from which the findings have been calculated (i.e. in 2008 whilst EDGEnetwork participants represent 14% of all MLA course participants overall, the sample obtained was n=57, this equated to 19% of the total 2008 tier 2 sample).

Note: The aggregation of course participation lists for the purpose of undertaking the survey may not have included all participants from all courses. In some instances participant details were not sufficient to enable contact by telephone, as such they have been omitted from the sample.

⁶ Profiles will be adjusted when the ABS 2010 data becomes available, expected before the 2012 KPI survey.

Table 6: Actual Sample Segmentation

		NSW/ ACT	VIC	QLD	SA/NT	WA	TAS	Northern Beef	Southern Beef	Sheep/ Lamb	Goats
Tier 1 (Awareness)	n=305	64	40	70	55	56	20*	89	101	100	5*
Tier 2 (Adoption)	n=272	76	81	70	20	14*	11*	72	102	98	6*

**Low Sample Base*

The tier 2 sample size was increased in previous years to $n=280$ to adequately represent the growing number of programs being undertaken by MLA. However, obtaining sample for this tier is more a function of known course participants than the number of courses, the weak cells shown here represent low survey participant numbers in those regions or segments.

Some segments have fewer respondents than our target sample of $n=50$ and minimum base of $n=30$. This has resulted from fewer program and course contacts being provided, possibly the result of less participation or lack of compliance with recording participant details. Those producer segments with samples below $n=30$ should be viewed with caution.

4 KPI 2011 Survey Results

4.1 MLA Program Awareness (2011 Tier 1 Sample n=305)

The Tier 1 element of the KPI survey has been designed to determine targeted producers unaided and aided awareness of the MLA programs as a means of evaluating the effectiveness of the overall communication strategy by LPI. The **tier 1** sample is a **random sample** representative of the wider population of targeted producers.

The KPI 2011 survey has again evaluated program awareness from an independent random sample of **n=305** livestock producers, where producers with all levels of exposure to MLA had an equal chance of participation.

- q **Overall** a total of **90%** of all **tier 1** respondents are **aware** of one or more of the MLA programs mentioned. This is consistent with 92% in 2010 and 2009 and is up from 85% in 2008 and 84% in 2007, and maintains the elevated level of awareness from 73% in 2005.
- q **53%** of respondents indicated an unprompted or **unaided awareness** of MLA programs, this is consistent with 51% in 2010 and is an increase from 46% in 2009. These most recent results are well up from earlier survey results, 29% in 2008, 38% in 2007 and 28% in 2006. It is this key measurement that LPI aims to improve with communication strategies.
- q **90%** of respondents have a **prompted awareness** of one or more of the MLA programs mentioned, this is consistent with 92% in 2010 and 90% in 2009. This result is well up from earlier survey results, 80% in 2008, 78% in 2007, and 84% in 2006.
- q **10%** of tier 1 respondents were **unaware** of any MLA programs at all, this is consistent with 8% in 2010 and 2009. These results are an improvement on 15% in 2008, 16% in 2007 and 13% in 2006.

With the changing dynamic of producer populations, these positive awareness results reflect the level of program activity and communication initiatives required to maintain them. With succession, acquisition and attrition constantly effecting the primary producer segment maintaining awareness at the 90% level appears achievable.

The percentages represented below will not add to overall awareness, as nett⁷ prompted or aided 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: Unaided and Aided Activity Awareness by Target Producer Segment

	2009 Tier 1 (n=300)			2010 Tier 1 (n=290)			2011 Tier 1 (n=305)		
	Unaided	Aided	Total	Unaided	Aided	Total	Unaided	Aided	Total
Northern Beef Producers (2009 n=90, 2010 n=89, 2011 n=91)	37%	86%	89%	53%	89%	88%	49%	93%	88%
Southern Beef Producers (2009 n=98, 2010 n=101, 2011 n=100)	47%	89%	90%	55%	92%	93%	52%	84%	87%
Sheep/Lamb Producers (2009 n=102, 2010 n=100, 2011 n=113)	52%	96%	97%	46%	95%	94%	58%	91%	94%
Total:	46%	90%	92%	51%	92%	92%	53%	90%	90%

The overall nett effect in the 2011 survey, is that **90%** of livestock producers surveyed are aware of one or more MLA programs, this appears to be consistent with previous results across all segments.

The use of the language 'MLA programs' has been used in the questionnaire since 2007, in 2009 this was updated to 'MLA Activities' to reflect the wider range of producer interaction that MLA undertakes. Both 'program' and 'activity' appear to be widely recognised or associated with MLA and is resulting in consistent data.

Specific program or activity names continue to cause some confusion as the high aided or prompted results show.

⁷ Where courses recalled are from the same course group, eg EDGENetwork, the nett result will remain the same however recall for those specific courses will increase or decrease.

Table 8: Unaided and Aided Program Awareness Overall

Overall awareness by program (activity) is as follows:

(Note: expressed as a **percentage of all targeted livestock producers**, not just those segments for which each program is targeted).

MLA Activity classifications:	Unaided Awareness			Aided Awareness			Total Awareness		
	2009	2010	2011	2009	2010	2011	2009	2010	2011
More Beef from Pastures	6%	6%	7%	21%	28%	29%	27%	33%	35%
Prime Time (or Making More from Merino's)	2%	3%	-	37%	17%	22%	37%	20%	22%
PIRD's (or Producer Demonstration Sites)	2%	3%	2%	23%	19%	30%	25%	27%	31%
EDGEnetwork (any EDGE or EDGEnetwork course)	12%	11%	12%	80%	73%	68%	81%	75%	71%
COP (Cost of Production workshops)	1%	4%	1%	23%	37%	32%	24%	41%	33%
Non MLA Events (Courses conducted by organisations other than MLA with MLA support)	2%	1%	2%	-	-	-	2%	1%	2%
Beef Up Forums	3%	6%	5%	11%	13%	12%	15%	19%	17%
Grain and Graze	1%	3%	1%	31%	24%	28%	32%	28%	29%
Making More from Sheep	2%	5%	3%	37%	35%	35%	39%	39%	38%
Evergraze	2%	3%	1%	22%	24%	21%	24%	27%	22%
Total:	46%	51%	53%	2009	92%	90%	92%	92%	90%

KPI Tier 1 Sample Base 2009 n=300, 2010 n=290, 2011 n=305.

Overall EDGEnetwork program awareness continues to be high at **71%** (down from 81% in 2009), particularly when prompted. These include **Prograze** with 44% awareness, **EDGEnetwork NFI**⁸ with 29%, GLM with 19%. Also included were Lamb Cheque 10%, Beef Cheque 10%, Nutrition Edge 13% and Breeding Edge 10%.

Note: A number of EDGEnetwork programs were recalled exclusively by northern beef producers, bolstering overall awareness for EDGEnetwork programs. These included northern beef awareness for GLM (63%), Nutrition Edge (43%) and Breeding Edge (34%).

⁸ NFI = No Further Information provided by respondent.

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

Table 9: Program Awareness by Target Producer Segment and Overall

MLA Activity classifications:	Northern Beef			Southern Beef			Sheep/Lamb			Total (n=300)	Total (n=290)	Total (n=305)
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
More Beef from Pastures	-	-	2%	52%	63%	62%	27%	33%	39%	27%	33%	35%
Prime Time (or Making More from Merino's)	20%	11%	12%	31%	16%	23%	59%	33%	29%	37%	20%	22%
PIRD's (or Producer Demonstration Sites)	21%	29%	35%	28%	25%	34%	26%	26%	25%	25%	27%	31%
EDGEnetwork (any EDGE or EDGEnetwork course)	81%	72%	73%	76%	75%	61%	87%	77%	79%	81%	75%	71%
Cost of Production workshops	-	35%	30%	34%	47%	37%	34%	41%	34%	24%	41%	33%
Non MLA Events (Courses conducted by organisations other than MLA with MLA support)	1%	1%	-	2%	1%	1%	3%	1%	4%	2%	1%	2%
Beef Up Forums	44%	55%	54%	3%	7%	3%	1%	-	-	15%	19%	17%
Grain and Graze	14%	15%	19%	29%	22%	21%	48%	45%	44%	32%	28%	29%
Making More from Sheep	12%	7%	12%	30%	29%	24%	71%	79%	70%	39%	39%	38%
Evergraze	14%	11%	10%	27%	29%	28%	31%	39%	26%	24%	27%	22%
Total:	89%	88%	88%	90%	93%	87%	97%	94%	94%	92%	92%	90%

KPI Tier 1 Sample Base 2009 n=300, 2010 n=290, 2011 n=305.

(refer MLA KPI 2011 Tables Tier 1 - Tables 34-38)

4.1.1 MLA Program Awareness within Target Producer Segment

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

Table 10: Northern Beef Producers

Awareness - Northern Beef Producers	2006 (n=50)	2007 (n=49)	2008 (n=54)	2009 (n=90)	2010 (n=89)	2011 (n=89)
Total Awareness:	78%	84%	72%	89%	88%	88%
PIRDS/Producer Demonstration Sites	38%	33%	20%	21%	29%	35%
Nett EDGE:	56%	53%	46%	81%	72%	73%
<i>EDGEnetwork</i>	14%	29%	22%	42%	39%	40%
<i>Breeding EDGE</i>	<i>na</i>	22%	-	43%	37%	34%
<i>Nutrition EDGE// Northern Nutrition</i>	48%	27%	2%	47%	47%	43%
<i>Grazing Land Management</i>	42%	35%	2%	74%	60%	63%
Cost of Production	<i>na</i>	29%	44%	<i>na</i>	35%	30%
Non MLA Events	14%	16%	11%	1%	1%	na
Beef Up Forum	<i>na</i>	37%	44%	44%	55%	54%
Grain and Graze	<i>na</i>	<i>na</i>	37%	14%	15%	19%
Making More from Sheep	<i>na</i>	<i>na</i>	11%	12%	7%	12%
Evergraze	<i>na</i>	<i>na</i>	19%	14%	11%	10%
None (No Awareness of activities at all)	22%	16%	28%	11%	12%	12%

- q In **2011**, **88%** of Northern Beef Producers are **aware** of MLA programs, the same as 88% in 2010 and consistent with 89% in 2009. These recent results are up from 72% in 2008, 84% in 2007 and 78% in 2006, and is a considerable improvement from 67% in 2005.
- q This **level of awareness** continues to be achieved due to Beef Up Forum, PIRDS and continuing EDGEnetwork programs, including GLM.
- q Very few producers fall into the **non-aware** category, reinforcing that MLA is reaching targeted producers with at least one program offering.

The EDGEnetwork program awareness is the result of obtaining a nett EDGEnetwork awareness from a random sample of producers. The questionnaire prompts respondents to identify levels of awareness for specific EDGEnetwork programs in the target regions, this process aggregates this result to create the nett EDGEnetwork result.

In **2011** the main **EDGEnetwork** programs that **northern beef producers** are aware of included, EDGEnetwork nei⁹ 40% (n=36), GLM 63% (n=57), Nutrition Edge 43% (n=39) and Breeding Edge 34% (n=31), MSA 2% (n=2). No other Edge programs registered with any significance in this segment.

(refer MLA KPI 2011 Tables Tier 1- Tables 34-38)

⁹ nei – not elsewhere included.

Table 11: Southern Beef Producers

Awareness - Southern Beef Producers	2006 (n=73)	2007 (n=79)	2008 (n=71)	2009 (n=98)	2010 (n=101)	2011 (n=100)
Total Awareness:	86%	82%	86%	90%	93%	87%
PIRDS/Producer Demonstration Sites	32%	37%	32%	28%	25%	34%
Prime Time or Making More from Merinos	26%	32%	18%	31%	16%	23%
More Beef from Pastures	60%	65%	63%	52%	63%	62%
Nett EDGE:	58%	51%	72%	76%	75%	61%
<i>EDGEnetwork</i>	32%	25%	28%	33%	32%	21%
<i>Prograze</i>	40%	32%	61%	58%	67%	52%
<i>Sire Selection</i>	<i>na</i>	<i>na</i>	24%	22%	<i>na</i>	<i>na</i>
<i>Beef Cheque</i>	18%	4%	<i>na</i>	22%	15%	18%
<i>Lamb Cheque</i>	8%	1%	1%	24%	9%	13%
Cost of Production	29%	42%	38%	34%	47%	37%
Non MLA Events	32%	18%	21%	2%	1%	1%
Beef Up Forums	-	25%	4%	4%	7%	3%
Grain and Graze	<i>na</i>	<i>na</i>	23%	29%	22%	21%
Making More from Sheep	<i>na</i>	<i>na</i>	25%	30%	29%	24%
Best Wool/Best Lamb	<i>na</i>	<i>na</i>	10%	12%	15%	12%
Evergraze	<i>na</i>	<i>na</i>	18%	27%	29%	28%
None (No Awareness of activities at all)	14%	18%	14%	10%	7%	13%

q **87%** of southern beef producers are **aware** of MLA programs in **2011**, this represents a fall from 93% in 2010 and 90% in 2009. This result is similar to 86% in 2008, 82% in 2007, and 86% in 2006. This outcome whilst down on previous results represents a consistently high level of MLA program awareness amongst southern beef producers.

This result represents a long-term increase in awareness from 73% in 2005 for MLA programs promoted to this target producer segment. Specific beef programs remain prominent with 62% of producers aware of MBFP programs and 52% aware of Prograze (slightly down on the previous year). The level of awareness of other off-target activities is significant amongst the mixed enterprise nature of the southern segments.

(refer MLA KPI 2011 Tables Tier 1 - Tables 34 - 38)

Table 12: Sheep / Lamb Producers

Awareness – Sheep / Lamb Producers	2006 (n=78)	2007 (n=76)	2008 (n=86)	2009 (n=102)	2010 (n=100)	2011 (n=113)
Total Awareness:	92%	86%	92%	97%	94%	94%
PIRDS/Producer Demonstration Sites	42%	29%	29%	26%	26%	25%
Prime Time or Making More from Merinos	68%	55%	60%	59%	33%	29%
Nett EDGE:	72%	49%	81%	87%	77%	79%
<i>EDGEnetwork</i>	33%	30%	26%	35%	27%	26%
<i>Prograze</i>	49%	26%	62%	72%	71%	73%
<i>Sire Selection</i>	na	na	34%	39%	na	na
<i>Lamb Cheque</i>	17%	4%	1%	20%	19%	16%
Cost of Production	43%	43%	35%	34%	41%	34%
Non MLA Events	33%	21%	12%	3%	1%	4%
Grain and Graze	na	na	45%	48%	45%	44%
Making More from Sheep	na	na	64%	71%	79%	70%
Best Wool/Best Lamb	na	na	5%	24%	52%	32%
Evergraze	na	na	17%	31%	39%	26%
None (No Awareness of Programs at all)	8%	16%	8%	3%	6%	6%

- q **94%** of sheep / lamb producers are aware of MLA programs in **2011**, the same result as in 2010 and consistent with 97% in 2009. This is up from 92% in 2008 and 86% in 2007. The 2011 result represents a 12% increase on 80% in 2005.
- q **MMfS** has fallen slightly but at **70%** awareness it is a widely recognised program amongst this segment. Interestingly **39%** of this segment are also aware of **MBfP**.
- q **Edge Network** continues to be a strong course ‘brand’ for MLA with **79%** awareness in the sheep / lamb segment.
- q **Grain and Graze** and **Evergraze** are examples of MLA programs gaining awareness amongst sheep / lamb producers, increasing from 17% in 2008 to 39% in 2010.

(refer MLA KPI 2011 Tables Tier 1 - Tables 34 - 38)

4.1.2 Overall Program Awareness by MLA Membership Status

The KPI surveys have not set out to gather a representative sample of members versus non-members. However, the survey has recorded the membership status of the sample so we are able to reflect on the program awareness levels amongst members and non-members as separate population bases.

Of the targeted producers interviewed in the **2011 tier 1 sample** (n=305), **68%** indicated they were **MLA Members** (received Feedback magazine). This is down on the 2010 result of 77% and 71% in 2009. This trend is well below the 85% achieved in 2008, however this outcome appears more consistent with 2007 where 71% of respondents indicated they were MLA Members.

- q **97%** of **members** are aware of one or more MLA programs, a slight improvement on 95% in 2010 and 2009. This result represents an increase from 87% in 2008 and is consistent with awareness levels similar to 93% in 2007. This result represents a long-term increase of **17%** from 80% in the 2005 survey.
- q **81%** of **members** are aware of the **EDGEnetwork** activities, up from 80% in 2010 and still below 86% in 2009. Awareness of **More Beef from Pastures** has increased to **41%**, up from 38% in 2010 and 33% in 2009. Again as few as **4%** of members were unable to recall any MLA programs, less than the 5% in 2010 and far fewer than the 13% recorded in 2008.
- q Overall activity awareness amongst non-members of **74%** is markedly down from 83% in 2010 and 84% in 2009. This outcome amongst non-members still represents a substantial improvement from 59% in 2006 and 49% reported in the 2005 survey.
- q **26%** of non-members are aware of **MBfP**, up from 20% in 2010 and 12% in 2009, showing a return to previous awareness levels of 25% in 2008.
- q **49%** of non-members are aware of **EDGEnetwork**, down from 57% in 2010 and 70% in 2009.

Table 13: Program Awareness by Membership Status

	2007 Awareness (n=201)*		2008 Awareness (n=204)*		2009 Awareness (n=300)		2010 Awareness (n=290)		2011 Awareness (n=305)	
	Member (n=147)	Non Member (n=54)	Member (n=180)	Non Member (n=24)	Member (n=212)	Non Member (n=73)	Member (n=224)	Non Member (n=54)	Member (n=207)	Non Member (n=90)
Membership Status	71%	29%	85%	15%	71%	24%	77%	19%	68%	30%
Aware of MLA Programs	93%	63%	87%	83%	95%	84%	95%	83%	97%	74%
None (No Awareness of Programs at all)	7%	37%	13%	17%	5%	16%	5%	17%	4%	26%

*In the 2007 Tier 1 sample, 2% or n=5 producers did not know if they were MLA members, In 2008 4% or n=9 producers, in 2009 5% or n=15 producers in 2010 4% or n=12 producers and in 2011 3% or n=8 producers did not know if they were MLA members.

(refer MLA KPI 2011 Tables Tier 1 - Table 38)

4.1.3 MLA Programs Attended - Tier 1 only

The KPI survey aims to determine what proportion of targeted producers overall had attended or participated in an MLA program, and if not what reason did they give for choosing not to participate in MLA programs (2011 tier 1 aware sample n=284*).

- q **23%** of the **90%** of targeted producers surveyed in **2011** who are **aware** of MLA programs (n=284) indicated they had attended or participated in an MLA program, down from 33% in 2010 and 31% in 2009. This result is well below 48% achieved in 2008.
- q This equates to **21%** of overall targeted producers (n=305), down from 31% in 2010 and 28% in 2009. This is well below 40% recorded in 2008. This result is the same as 21% reported in 2007. **36%** of producers who had attended or participated in an MLA program, had done so within the last 12 months and **64%** had attended a program more than 12 months ago.
- q **81%** of the **90%** of targeted producers surveyed in **2010** who are **aware** of MLA programs indicated they had **never** attended or participated in an MLA program, this does not include the 10% of producers who are unaware of MLA programs at all. This is much higher than 67% in 2010 and 69% in 2009 and well up from 52% in 2008, representing a significant fall in participation. This fall appears to be the result of lack of activity amongst the southern beef segment.
- q **29%** of **members** indicated they had attended an MLA program, down from 37% in 2010 and 36% in 2009, well down on 51% in 2008.

Table 14: Attended MLA Programs

Survey Year:	Total Sample:			Northern Beef			Southern Beef			Sheep / Lamb		
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
Nett attendance	31%	33%	23%	33%	28%	30%	24%	36%	21%	35%	35%	19%
Yes (1 program in the last 12 months)	16%	10%	8%	19%	12%	11%	12%	8%	9%	16%	11%	6%
Yes (1 program prior to last 12 months)	15%	23%	15%	14%	16%	18%	12%	28%	12%	19%	24%	13%
No (Never attended)	69%	67%	77%	68%	72%	70%	76%	64%	79%	65%	65%	81%

*Tier 1 sample 2009 n=278 (92% Aware of courses), 2010 n=274 (92% Aware of courses), **2011 n=284** (90% Aware of courses).

The KPI survey seeks to understand why producers chose not to participate in MLA programs. Some producers provided more than one reason for not being able to attend.

Of the **77%** of respondents who did not attend:

- q **45%** of those respondents interviewed who did not attend any MLA programs indicated that **'they had no time'**. This is consistent with 44% in 2010, 40% in 2009, 41% in 2008 and 39% in 2007.
- q **26%** indicated the programs **were too far away**, consistent with 2010.
- q **29%** of non-attendees indicated they **'did not know about'** the programs, up from 21% in 2010, 16% in 2009 and 15% in 2008 and 19% in 2007. This reflects on the importance of the communication strategy for program promotion.
- q **5%** indicated the **'topics were of no interest'** to them, fewer than the 8% in 2010.
- q Only 2% of non-attendees cited **drought** as the reason preventing them from attending any MLA program. There were none in 2010 and 2% in 2009, 3% in 2008, however this is well down on the 6% recorded in the 2007 survey and reflects the recent return to seasonal pasture growth.
- q **1%** indicated programs were too expensive, **1%** said they were too old and **1%** did not want to be told what to do!

(refer MLA KPI 2011 tables Tier 1 - Table 39-40)

4.1.4 Rating of MLA Programs

The program rating question aims to determine the **value of MLA activities** to producers by asking them to rate the value of the program that they had experience with. This question has been answered by each of the sample tiers relative to their level of awareness or participation in any MLA program.

In order to represent the distribution of results a value has been assigned to the response range to generate a mean rating out of 3. The question asks producers to indicate if they placed a high or low value on the activities they have experienced. The analysis model then applies a simple numeric rating out of 3 to the responses, where a **rating of 0 = no value** at all and a **rating of 3 = high value** or the top rating possible.

- q In tier 1, **88%** of targeted producers surveyed who attended programs (23%), indicated they rated those programs as **good or high value**, up from 85% in 2010. This remains below 90% recorded in 2009 and is up from 62% in 2008. This equates to a **mean rating of 2.11** (above the KPI of 2 out of 3). This is down from 2.12 in 2010 and 2.26 in 2009, all these results have been consistently above the 1.55 reported in 2008.
- q This includes **23%** of targeted producers who rated the programs they had experience with as **high value** (down from 31% in 2010 and 36% in 2009 and up from 15% in 2008), and **65%** as **good value** (up from 54% reported in 2010 and 2009 and 47% in 2008), followed by **12%** as **little value** (consistent with 12% in 2010 up from 8% in 2009 and down from 14% in 2008). No participants stated the programs had **no value at all**.
- q In 2011, **sheep / lamb producers again** recorded the **highest value** ratings with an aggregated **90%** of producers rating the MLA programs as **good or high value**, 1% up on the 2010 result. In 2009 this was highest amongst northern beef producers with 97%.
- q **88%** of the tier 1 program participants were **MLA members**, **87%** of these members indicated they rated the programs as **good or high value**, this resulted in a mean rating of **2.07** (also above the KPI of 2).

Table 15: Rating or Value of MLA Programs Tier 1 Producers have Experience with

Survey Year:	Total Sample:			Northern Beef			Southern Beef			Sheep/Lamb		
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
High Value (3)	36%	31%	23%	35%	30%	23%	41%	31%	16%	34%	30%	30%
Good Value (2)	54%	54%	65%	62%	43%	65%	50%	54%	74%	51%	61%	60%
Little Value (1)	8%	12%	12%	4%	22%	12%	9%	9%	11%	11%	9%	10%
No Value at all (0)	1%	3%	-	-	4%	-	-	6%	-	3	-	-
Mean Value:	2.26	2.12	2.11	2.31	2.00	2.12	2.32	2.11	2.05	2.17	2.21	2.20

Tier 1 Sample 2009 n=85, 2010 n=91, 2011 n=66.

(refer MLA KPI 2011 Tables Tier 1 - Table 41, course value means table)

4.1.5 General Awareness of MLA Procedures & Tools

The random sample of $n=290$ targeted producers were also asked to identify any of the MLA procedures and tools that MLA programs promote:

- q **63%** indicated they are aware of **Feedback magazine**, down from 73% in 2010 and 69% in 2009.
- q **36%** are aware of **Prograzier**, consistent with 40% in 2010 and 2009.
- q **27%** are aware of **Cost of Production (COP) calculators**, down from 39% in 2010 and 37% in 2009.
- q **23%** are aware of **Pasture Ruler**, down from 32% in 2010 and 31% in 2009.
- q **25%** are aware of **Stocking Rate Calculator**, down from 36% in 2010 and 31% in 2009.
- q **15%** are aware of **Feed Demand Calculator**, down from 24% in 2010 and 2009.
- q **13%** are aware of **Rainfall to Pasture growth outlook tool**, down from 23% in 2010 and 21% in 2009.
- q **13%** are aware of **Frontier magazine**, down from 16% in 2010 and 17% in 2009. Also, **6%** of producers are aware of **Beefspecs tool**, down from 10% in 2010 and 8% in 2009.
- q **7%** of producers mentioned **other tools** not included in the codeframe.

(refer MLA KPI 2011 Tables Tier 1 - Table 42-44)

4.1.6 Management Practices Currently Undertaken

Again in **2011** tier 1 producers were asked what management practices they currently undertook, allowing comparison with management practices changed as a result of program participation amongst the tier 2 producer sample.

- q In 2011 as in 2010, **all** of the tier 1 producers interviewed ($n=305$) indicated they are currently **undertaking at least 1** of the management practices listed.
- q **43%** of producers undertake between **2-11** of the management practices listed, down on 52% from 2010.
- q **42%** undertake between **12-16** management practices, up from 29% in 2010, **15%** undertake **more than 16**.
- q **Mean** number of practices currently undertaken is **12.15**, up from 11.49 in 2010.

Note: This data can be compared with tier 2 findings from Q3.8, however the tier 2 data refers to the specific changes made as a result of program participation in the last 12 months.

Table 16: Percentage of Tier 1 Respondents who currently undertake Management Practices

Management Practices:	Total Sample:			Northern Beef			Southern Beef			Sheep/ Lamb		
	2009	2010	2011	2009	2010	2011	2009	2010	2011	2009	2010	2011
Fat score or condition score stock at joining	27%	23%	21%	17%	8%	11%	27%	26%	23%	37%	34%	27%
Fat score or condition score stock at selling	62%	51%	51%	54%	37%	34%	58%	56%	56%	74%	59%	59%
Fat score or condition score stock at lambing	14%	11%	9%	1%	1%	3%	15%	6%	3%	25%	25%	18%
Track for a particular Market for livestock based on average age at sale time	55%	51%	58%	64%	64%	62%	64%	58%	64%	40%	31%	51%
Calculate the Cost of Production (COP)	76%	67%	73%	77%	69%	73%	78%	69%	68%	74%	62%	77%
Routinely weigh livestock to monitor growth / Weight gain	44%	37%	38%	33%	34%	45%	52%	45%	34%	49%	33%	37%
Measure Weaning %	64%	60%	63%	69%	58%	67%	50%	48%	52%	73%	73%	68%

Management Practices:	Total Sample:			Northern Beef			Southern Beef			Sheep/ Lamb		
Measure Mortality %	61%	57%	58%	66%	60%	51%	69%	63%	69%	49%	47%	53%
Use EBV's in sire selection	41%	43%	39%	31%	33%	25%	45%	52%	44%	45%	42%	46%
Change stocking rates / Measure and adjust stocking rates	72%	64%	73%	78%	75%	78%	70%	55%	69%	66%	63%	73%
Set grazing targets to determine stock movement using rotation length	45%	42%	45%	37%	38%	42%	48%	54%	53%	48%	34%	40%
Set grazing targets to determine stock movement using pasture residues	48%	43%	58%	52%	42%	55%	50%	52%	55%	42%	36%	64%
Set grazing targets to determine stock movement using pasture availability	77%	71%	75%	78%	70%	73%	80%	78%	76%	74%	64%	75%
Set grazing targets to determine stock movement using animal requirements	63%	60%	63%	56%	61%	54%	68%	62%	65%	66%	56%	67%
Routinely assess pasture quality eg. dry matter	55%	56%	60%	73%	62%	69%	47%	56%	60%	48%	51%	53%
Calculate a forage or pasture budget	23%	18%	21%	23%	13%	15%	24%	23%	27%	21%	18%	19%
Pregnancy test cows routinely	40%	38%	39%	53%	45%	55%	53%	50%	44%	19%	18%	22%
First calf heifers managed separately from main herd	51%	51%	56%	58%	55%	68%	78%	74%	74%	22%	23%	32%
Monitor worm egg counts	25%	18%	16%	4%	-	1%	17%	9%	4%	47%	44%	39%
Vaccinate to prevent clostridial diseases	54%	58%	64%	30%	22%	41%	61%	65%	65%	71%	81%	81%
Rotationally graze (regularly move same mob)	60%	60%	63%	44%	43%	44%	67%	75%	81%	65%	60%	63%
Increase the % of land sown to perennial pastures	29%	28%	29%	21%	18%	13%	34%	33%	34%	29%	33%	35%
Have a written formal farm management plan including a weed management plan	23%	22%	24%	27%	21%	25%	20%	23%	29%	24%	21%	19%
Develop a formal succession plan	32%	30%	29%	26%	34%	36%	34%	29%	22%	37%	29%	29%

KPI Tier 1 Sample Base 2009 n=300, 2010 n=290, 2011 n=305.

Many of the management practices represented here show varying degrees of current use between surveys, however it appears that overall producers are implementing more management practices and change as a result of program participation.

- q **Setting grazing targets** appear to be more popular each year, as does **Assessing pasture quality**.
- q Few practices have become less popular, **Worm egg counts** and **Formal succession planning** appear to be examples of practices implemented by fewer program participants.
- q **Calculating COP** continues to be a popular management practice amongst participants, **73%** in **2011** from 67% in 2010 and 76% in 2009.

(refer MLA KPI 2011 Tables Tier 1 - Table 45)

4.2 Change in Management Practices (2011 Tier 2 Sample n=272)

4.2.1 Management Changes Overall

The KPI survey specifically asks producers if they have changed their management practices as a **direct** result of participating in specific MLA programs. This approach **links management change** directly with specific **program attendance**.

The KPI **2011** Survey has sampled **n=272** program attendees from the **most recent 12 months** to determine if program participation directly influenced a change in management or adoption of new management practices. The 2011 sample includes **82%** who indicated they were **MLA members**, down from 87% in 2010 and consistent with 83% in 2009. Enterprise segments include **n=72** (26%) Northern Beef, **n=102** (38%) Southern Beef, **n=98** 36% Sheep / Lamb and **n=6** (2%) who were also Goat producers.

Over the past 12 months, **38%** of program participants interviewed attended 1 program (down from 44% in 2010 and 51% in 2009), **51%** had attended 2 programs (up from 45% in 2010 and 41% in 2009) and **8%** had attended 3 programs (consistent with 7% in 2010 and 6% in 2009).

- q **70%** of program participants indicated they have **changed management practices** as a direct result of attending one or more MLA programs in the **last 12 months**. This is 20% above the KPI of 50% and represents a marked increase from 59% in 2010 and 2009.
- q The overall management change outcome is influenced by the **northern beef producer** segment where this years survey reported **54%** of participants making change. This is an increase from 43% in 2010 and exceeds the KPI of 50%.
- q Management practice change in the **southern beef** is **75%**, up from 70% in 2010 and 60% in 2009. This is well above the 50% KPI.
- q **Sheep / lamb** is **77%**, well up from 59% in 2010 and 65% in 2009. Apart from 2010 this segment has consistently embraced the management practices promoted by MLA, the 2011 result reflects this and easily exceeds the 50% KPI.

Table 17: Management Practice Change – Year on Year change by Target Producer Segment

	2006	2007	2008	2009	2010	2011
Producer Segments:	<i>n=236</i>	<i>n=287</i>	<i>n=280</i>	<i>n=200</i>	<i>n=294</i>	<i>n=272</i>
Northern Beef Producers	49%	65%	57%	43%	43%	54%
Southern Beef Producers	45%	52%	62%	60%	70%	75%
Sheep/Lamb Producers	55%	68%	64%	65%	59%	77%
Total :	50%	58%	61%	59%	59%	70%

KPI Tier 2 sample base, 2006 n=236, 2007 n=287, 2008 n=295, 2009 n=200, 2010 n=294, **2011 n=272**.

The key programs represented¹⁰ amongst the tier 2 sample include Beef Up Forums, PDS/PIRD's, MBfP, MMfS and Evergraze.

- q **EDGE** is more significant in 2011 and represents **21%** of the tier 2 sample or **n=58** (up from 15% in 2010), the aggregated EDGE result is made up of Prograze 3%, **n=8** (5%, **n=14** in 2010), Beef Cheque 5%, **n=13** (4%, **n=12** in 2010), GLM 2%, **n=5** (3%, **n=10** in 2010), EDGENetwork 11%, **n=30** (2%, **n=7** in 2010), Nutrition Edge 1%, **n=2** (1%, **n=4** in 2010) and MSA 2%, **n=5**.
- q Other courses represented in 2011 include, **Evergraze 19%**, **n=51** (33%, **n=98** in 2010), **MBfP 25%**, **n=68** (19%, **n=55** in 2010), **MMfS 24%**, **n=66** (18%, **n=53** in 2010), **PIRD's 16%**, **n=43** (9%, **n=26** in 2010), **Beef Up Forums 17%**, **n=45** (24%, **n=72** in 2010), **Bestwool / Bestlamb 5%**, **n=14** (5%, **n=15** in 2010), and **COP 1%**, **n=2** (2%, **n=5** in 2010).

(refer MLA KPI 2011 Tables Tier 2 -Table 38-40)

¹⁰ Readers note that some of the course identification and attendance was collected directly from respondents using information provided by MLA, other courses attended is based solely on the recollection of the respondent and may be subject to a margin of error in the recall of the specific course they actually attended. This is not a representation of the courses attended by targeted producers but a profile of the sample based on quotas established using MLA attendance data.

4.2.2 Management Change Year on Year by MLA Activity

Management change when represented **year on year** provides an evaluation of the effectiveness MLA programs each KPI survey year as the programs evolve. The numbers below represent the percentage of MLA program participants who changed management practices as a direct result of attending a particular MLA program.

- q During **2011**, **70%** of all program attendees were influenced to change management practices, this is an improvement on 59% in 2010 and 2009 and is still up on 61% reported in 2008.
- q Most key courses demonstrate improved rates of management change, the highest is amongst participants of **PIRDS** activities with **70%** indicating change, however the most significant improvement is amongst **MMfS** participants, increasing from 39% to **68%** by 29%. (Evergraze also performs well however the sample has had longer to make change).

Table 18: Management Change - Year on Year by Program Participants

MLA Activities:	2006 (n=236)	2007 (n=287)	2008 (n=295)	2009 (n=200)	2010 (n=294)	2011 (n=272)
More Beef from Pastures	35%	53%	51%	50%	53%	68%
Prime Time/Making More from Merinos	44%	85%	-	-	-	-
PIRD's/Producer Demonstration Sites	72%	51%	52%	53%	67%	70%
EDGE/EDGEnetwork workshops	47%	60%	58%	66%	87%*	69%*
Cost of Production	36%	48%	48%	-	-	-
Beef Up Forum	-	46%	36%	17%*	33%	39%
Making More from Sheep	-	-	42%	57%	39%	68%
Evergraze	-	-	-	29%*	62%	68%
Total Changed:	50%	58%	61%	59%	59%	70%

Tier 2 sample 2006 n=236, 2007 n=287, 2008 n=295, 2009 n=200, 2010 n=294, **2011 n=272**.
* Low Sample base.

4.2.3 Management Change Year on Year by Producer Segment

Table 19: Management Change - Northern Beef Producers

MLA Activities:	Northern Beef - Activity Participants (Sample base)					Activity Participants who Changed Management Practices				
	2007 (n=96)	2008 (n=96)	2009 (n=44)	2010 (n=84)	2011 (n=72)	2007	2008	2009	2010	2011
PIRD's/Producer Demonstration Sites	n=7*	-	n=5*	n=6*	n=6*	71%	-	75%*	33%*	67%*
EDGE/EDGEnetwork workshops	n=53	n=46	n=19	n=6*	n=16*	69%	52%	61%	67%*	50%*
Beef Up Forums	n=35	n=47	n=22	n=66	n=38	46%	36%	18%	33%	39%

*Low Sample base

- q Overall, **54%** of northern beef producers have changed management practices as a result of program participation during the 2010 - 2011 survey interval. This is an improvement on 43% in 2010 and 2009 and down from 57% in 2008. Beef Up Forums were again well attended and this solid sample indicates the level of management practice change is improving.

Table 20: Management Change - Southern Beef Producers

MLA Activities:	Southern Beef - Activity Participants (Sample base)					Activity Participants who Changed Management Practices				
	2007 (n=81)	2008 (n=90)	2009 (n=81)	2010 (n=112)	2011 (n=102)	2007	2008	2009	2010	2011
More Beef from Pastures	n=51	n=57	n=38	n=40	n=33	50%	51%	55%	53%	67%
PIRD's/Producer Demonstration Sites	n=14*	n=16*	n=14*	n=8	n=17*	29%	38%	64%	75%*	74%*
EDGE/EDGEnetwork workshops	n=14*	n=6*	n=40	n=9	n=10*	34%	67%	62%	100%*	100%*
Evergraze	-	-	n=5*	n=55	n=20	-	-	20%*	64%	50%

*Low sample base

- q **75%** of southern beef producers have changed management practices as a result of participating in an MLA program during the 2010 - 2011 survey interval, up from 70% in 2010, 60% in 2009 and 62% in 2008.
- q This is still largely been driven by **MBfP** where 67% of participants made changes. **However this overall result is skewed by high change rates amongst low sample base courses.**

Table 21: Management Change – Sheep / Lamb Producers

MLA Activities:	Sheep/Lamb - Activity Participants (Sample base)					Activity Participants who Changed Management Practices				
	2007 (n=109)	2008 (n=91)	2009 (n=72)	2010 (n=98)	2011 (n=98)	2007	2008	2009	2010	2011
PIRD's/Producer Demonstration Sites	n=26	n=14*	n=16*	n=10*	n=14*	58%	64%*	38%*	80%*	71%*
EDGE/EDGEnetwork workshops	n=27	n=5*	n=16*	-	-	69%	100%	100%	-	-
Cost of Production	n=24	n=22	n=2*	-	-	46%	55%	-	-	-
Making More from Sheep	-	n=50	n=38	n=46	n=60	-	42%	60%	39%	67%
Evergraze	-	-	n=2*	n=42	n=24	-	-	50%*	60%	83%

*Low sample base

- q **77%** of sheep / lamb producers have changed management practices as a result of participating in an MLA program during the 2010 - 2011 survey interval, up from 59% in 2010, 65% in 2009 and 64% in 2008.
- q Sheep / Lamb producers are influenced by **MMfS** with **67%** of participating producers now making management changes as a result of attending, this is up significantly from 39% in 2010 and closer to 60% reported in 2009. **Evergraze** has substantially improved amongst southern producers, it is having a significant impact on participants with 83% indicating management change as a result of participation, up from 60% in 2010. Remember some of these participants are from 2009 courses and have had more time to implement change.
- q **96%** of those respondents who indicated they made changes to management practices (70%) **continue to use those practices**, only 4% stopped using them.

(refer MLA KPI 2011 Tables Tier 2 - Tables 40 - 45)

4.2.4 Management Practice Change after Attending MLA Programs

Previous KPI survey's have identified grazing management, pasture management, supplementary feeding and nutrition practices as the main areas of management where producers have made changes.

Since 2009 this management change question was expanded to include specific current practices as well as providing further insight into the significance of those changes that have been made. Where direct comparisons are possible previous years figures have been included.

- q **16%** of those **70%** of program participants who made changes, made grazing management changes through **rotational grazing** (equivalent of 11% of all program participants). This is down from 22% in 2010, 20% in 2009 and 27% in 2008.
- q **Setting grazing targets to determine rotation length** appears to be gaining traction with **19%** of practice changers nominating this.

Table 22: Percentage of Program Participants who Changed Specific Management Practices

Management Practices:		Total:	PIRD's	MMTs	Beef Up Forums	More Beef from Pastures	EDGE	Evergraze
Rotationally Graze / Regularly move livestock	2011	16%	13%	5%	6%	30%	15%	14%
	2010	22%	21%	9%	8%	36%	15%	30%
	2009	20%	10%	11%	-	29%	29%	-
	2008	27%	37%	12%	17%	36%	24%	-
Set grazing targets to determine stock movement / rotation length	2011	19%	33%	9%	22%	17%	15%	17%
	2010	19%	37%	5%	4%	41%	38%	13%
	2009	16%	29%	4%	20%	25%	14%	-
Set grazing targets to determine stock movement / pasture residues	2011	14%	20%	7%	17%	13%	10%	14%
	2010	8%	11%	5%	4%	9%	23%	6%
	2009	9%	24%	4%	-	8%	9%	-
Set grazing targets to determine stock movement / pasture availability	2011	16%	20%	5%	17%	17%	20%	17%
	2010	11%	26%	5%	8%	14%	15%	9%
	2009	10%	19%	4%	-	13%	11%	-
Feeding Practices / Supplements / Supplementary Feeding	2011	7%	3%	9%	6%	4%	5%	3%
	2010	11%	11%	18%	12%	9%	8%	10%
	2009	19%	19%	33%	20%	17%	9%	-
	2008	20%	26%	12%	22%	6%	36%	-
Other Mating / Birthing Weaning Practices / Scanning etc	2011	9%	9%	18%	6%	6%	10%	3%
	2010	9%	5%	18%	4%	14%	8%	7%
	2009	18%	19%	33%	-	17%	6%	-
Calculate the Cost of Production (COP)	2011	2%	-	2%	-	2%	2%	-
	2010	7%	26%	5%	8%	9%	8%	1%
	2009	8%	19%	-	20%	8%	6%	-
	2008	13%	11%	8%	13%	6%	9%	-
Routinely weigh livestock to monitor growth / Weight gain	2011	4%	7%	-	11%	-	2%	-
	2010	3%	5%	-	4%	-	-	4%
	2009	6%	5%	7%	-	4%	9%	-
	2008	7%	4%	12%	4%	12%	6%	-
Measure Weaning %	2011	4%	10%	7%	-	4%	5%	-
	2010	4%	11%	9%	8%	-	-	-
	2009	5%	-	4%	20%	8%	6%	-

Management Practices:		Total:	PIRD's	MMFS	Beef Up Forums	More Beef from Pastures	EDGE	Evergraze
Use EBV's in sire selection	2011	2%	-	2%	-	-	-	-
	2010	2%	5%	5%	-	5%	-	-
	2009	8%	29%	-	-	-	9%	-
Change stocking rates / Measure and adjust stocking rates	2011	6%	10%	9%	11%	4%	2%	8%
	2010	11%	11%	5%	16%	9%	8%	12%
	2009	11%	14%	11%	-	4%	17%	-
	2008	6%	7%	12%	13%	-	3%	-

Tier 2 Sample base, 2008 n=295, 2009 n=200, 2010 n=294, 2011 n=272.

70% of MLA program participants have changed management practices. **Note** that the **percentages above represent** the proportion of specific MLA program participants surveyed who have changed particular management practices as a result of attending those programs, **not** the proportion of overall attendees.

- q **70%** (n=190) of the n=272 tier 2 producers interviewed indicated they have made changes using **at least 1** of the management practices listed.
- q **49%** of these producers participated in **only 1 program**, 21% participated in 2 programs, 11% participated in 3 programs and 9% participated in 4 programs. 2 producers surveyed (1%) indicated they had participated in 10 separate MLA programs.
- q On average producers made **2.25** significant management changes as a result of program attendance, up slightly from 2.04 in 2010 and down from 2.53 in 2009. The best performing program is **Edge** where, on average **2.74** management changes have been made.
- q **Retention is high, 96%** of those **70%** of program participants who made changes are still using the new or changed management practice, this is consistent with 99% recorded in 2010 and 2009.

(refer to MLA KPI 2011 Tables Tier 2 - Tables 76 - 78 – Includes primary and all other program attendees)

4.2.5 Management Practice Change by Producer Segment

Tier 2 producers were asked what management practices they changed as a result of participating in an MLA program, these results allow some segment comparison with management practices currently undertaken amongst the tier 1 producer sample (refer table 16). However this data measures recent change only and is not a measure of overall practice in tier 2, tier 1 data is more representative of overall behaviour.

- q Of those **70%** (*n*=190) of the *n*=272 tier 2 producers interviewed who indicated they have made management practice changes, many are implementing **grazing management practices** with other previously popular tools being overlooked (or already in practice).

Table 23: Percentage of Tier 2 Respondents who Changed Management Practices

Management Practices:	Sample of management changers:		Northern Beef		Southern Beef		Sheep/ Lamb	
	Survey Year: 2010 59% (<i>n</i> =170)	2011 70% (<i>n</i> =190)	2010 43% (<i>n</i> =34)	2011 54% (<i>n</i> =39)	2010 70% (<i>n</i> =78)	2011 75% (<i>n</i> =76)	2010 59% (<i>n</i> =58)	2011 77% (<i>n</i> =75)
Fat score or condition score stock at joining	5%	3%	-	-	3%	5%	10%	3%
Fat score or condition score stock selling	1%	2%	-	-	-	3%	3%	1%
Fat score or condition score stock at lambing	6%	2%	-	-	3%	1%	14%	4%
Track for a particular Market for livestock based on average age at sale time	3%	1%	9%	-	1%	1%	2%	-
Calculate the Cost of Production (COP)	7%	2%	6%	8%	6%	-	9%	1%
Routinely weigh livestock to monitor growth / Weight gain	3%	4%	3%	8%	3%	3%	3%	3%
Measure Weaning %	4%	4%	6%	-	1%	4%	5%	7%
Measure Mortality %	1%	-	-	-	1%	-	-	-
Use EBV's in sire selection	2%	2%	-	-	3%	-	2%	4%
Change stocking rates / Measure and adjust stocking rates	11%	6%	12%	-	9%	5%	12%	11%
Set grazing targets to determine stock movement using rotation length	19%	19%	9%	15%	28%	25%	12%	16%
Set grazing targets to determine stock movement using pasture residues	8%	14%	6%	18%	10%	16%	5%	11%
Set grazing targets to determine stock movement using pasture availability	11%	16%	9%	18%	15%	21%	7%	11%
Set grazing targets to determine stock movement using animal requirements	3%	13%	-	13%	5%	17%	2%	8%
Routinely assess pasture quality eg. dry matter	5%	7%	-	15%	8%	4%	5%	7%
Calculate a forage or pasture budget	4%	3%	12%	5%	3%	3%	2%	1%
Pregnancy test cows routinely	3%	2%	3%	5%	4%	-	2%	3%
First calf heifers managed separately from main herd	2%	2%	6%	5%	1%	3%	-	-
Monitor worm egg counts	1%	3%	-	-	1%	1%	2%	5%
Vaccinate to prevent clostridial diseases	1%	1%	-	-	3%	-	-	1%
Rotationally graze (regularly move same mob)	22%	16%	9%	10%	27%	30%	24%	5%

Management Practices:	Sample of management changers:		Northern Beef		Southern Beef		Sheep/ Lamb	
Increase the % of land sown to perennial pastures	8%	7%	-	-	12%	9%	7%	8%
Have a written formal farm management plan including a weed management plan	2%	1%	3%	-	1%	1%	3%	1%
Develop a formal succession plan	1%	-	-	-	-	-	2%	-
Feeding practices – feed lotting / supplementary feeding	11%	7%	9%	5%	8%	9%	17%	7%

KPI Tier 2 Sample Base 2009 n=118, 2010 n=170, 2011 n=190.

(refer to MLA KPI 2011 Tables Tier 2 - Table 71 - 114)

4.2.6 Why did the MLA program not influence management practice change?

Respondents who had not made any changes to management practices as a result of attending an MLA program were asked why not?

In 2011, 30% of program participants did not make any changes, an improvement on 41% in 2010 and 2009, 39% in 2008 and 36% in 2007. These respondents were asked to indicate why they had not made changes.

Many respondents provided more than one reason for not implementing change, the main responses have been coded and represented below:

- q 33% indicated they felt they were ‘**already doing**’ the management practices being represented in the activity content. This is down from 35% in 2010, 44% in 2009 and 44% in 2008 and is an increase on 27% in 2007. This lower percentage result continues to highlight the successful uptake amongst targeted producers of the key messages and management practices being promoted.
- q 6% said they were **still thinking about it**, down on 12% in 2010, 9% in 2009 and 11% in 2008.
- q 12% indicated they were **doing OK** without the help of MLA, this was significant in **northern and southern beef** where 15% felt they were doing OK without MLA. This represents a slight increase from 11% in 2010.
- q **Drought** appears not to be an issue in 2011 with only 1% indicating **drought conditions** were preventing them from implementing change, this is consistent with recent climate conditions and is down on 6% in 2010, 7% in 2009 and 7% in 2008. This highlights the dramatic decrease from 16% in 2007 when drought was covering large areas of the country.
- q As few as 2% indicated that they felt they had received **no new information** to implement change, a good result and well down on 10% in 2010.
- q 16% felt the management practices being promoted did **not suit** their existing enterprise structure or operation, this is an increase from 10% in 2010, 13% in 2009 and is on par with 16% in 2008 and 18% in 2007.
- q 5% again indicated they did not have the **financial resources** to effect change, this is consistent with 5% in 2010 and is a drop from 7% in 2009 and 15% in 2008. This indicates fewer producers blame their financial situation when failing to effect change.
- q 5% indicated they had **time constraints** or had only **recently completed the course**, similar to previous surveys.
- q As few as 1% indicated that changes were being made **despite** MLA involvement and more as the inevitable result of the current climate. This is fewer than 6% in 2010 and 5% in 2009. This result indicates that there are very few cynics now participating in management practice change.

(refer MLA KPI 2011 Tables Tier 2 - Table 88)

4.2.7 Impact of Management Change

In **2011** the KPI Survey continued to measure the **impact** that management change has had on targeted producers. Those 70% (n=190) of the program participants from the most recent 12 months were asked to nominate the level of impact the adoption of change has had on their farm business.

- q **95%** reported a **positive outcome**. In the recent 12 months, **95%** of all program participants reporting change indicated that the changed management practices they undertook as a result of attending an MLA program had some **positive impact**, this is an increase from 92% in 2010 and 90% in 2009, significantly up on the 2008 result of 71%.
- q Alternatively **3%** of program participants felt the management changes they had implemented had **No Impact**, this is consistent with 4% in 2010 and 3% in 2009 and is significantly less than 26% recorded in 2008.

Table 24: Impact of Management Practice Change by Target Industry Segment

		Total Sample:	Northern Beef	Southern Beef	Sheep / Lamb
Very Positive Impact	2011	37%	51%	34%	33%
	2010	38%	38%	36%	41%
	2009	32%	32%	39%	28%
	2008	19%	23%	21%	13%
Some Positive Impact	2011	58%	46%	59%	63%
	2010	54%	41%	56%	59%
	2009	58%	47%	55%	66%
	2008	52%	46%	59%	54%
No Impact at all	2011	3%	3%	4%	1%
	2010	4%	15%	3%	-
	2009	3%	5%	4%	-
	2008	26%	28%	18%	33%
Negative Impact	2011	-	-	-	-
	2010	-	-	-	-
	2009	1%	5%	-	-
	2008	-	2%	-	-

Tier 2 Sample base 2008 n=295, 2009 n=200, 2010 n=294, 2011 n=272.

The MLA programs that appear to have the most positive impact include:

- q **MBfP** where **91%** of participants said the program had a positive or very positive impact, down from 100% in 2010 and consistent with 90% in 2009.
- q **96%** of **MMfS** participants indicated the program had a positive impact, down from 100% in 2010.
- q **PIRD's** where **97%** of participants indicated the program had a positive or very positive impact, down from 100% in 2010 and up from 90% in 2009.
- q **EDGEnetwork** where **95%** of participants said the program had a positive impact, up from 92% from previous surveys.
- q **97%** of **Evergraze** participants indicated the program had a positive impact, up from 93% in 2010.
- q In 2011 100% of **Beef Up Forum** participants provided **positive** feedback, up from 76% in 2010.

(refer MLA KPI 2011 Tables Tier 2 - Table 85)

4.2.8 MLA Program attendance outcomes

The survey also explored (using an open ended question) what the **positive and negative outcomes** were as a result of participating in any of the MLA programs.

Positives - of those **95%** (*n=181*) of program participants who saw positive outcomes (up from 92% in 2010, 90% in 2009 and 71% in 2008):

- q **29%** indicated the main positive outcome was an increase in **profitability**, this is well up from 18% in 2010 and consistent with 25% reported in 2009. As few as 9% rated profitability as a positive in 2008. This outcome was most significant amongst **PIRD's** participants with **41%** nominating profitability as the most positive outcome.
- q **20%** identified **better herd management** as the main positive outcome, up from 6% in 2010 and driven within MMfS and MBfP.
- q **19%** said **increased productivity**, now up from 6% in 2010 and 11% in 2009 it is on par with 17% reported in 2008. This improvement has been driven within PIRD's and MBfP.

Other positive outcomes mentioned by participants include **management skills 13%**, **pasture utilisation 8%**, **improved stock health 7%** and **improved feed management 9%**.

Negatives – As in previous surveys **No** respondents indicated any negative outcome or nominated anything specific.

Table 25: Positive Outcome by Program Attendees

Areas of impact:		Total:	PIRD's	MMfS	Beef Up Forums	MBfP	EDGE	Evergraze
Management Skills / Business (Increase)	2011 2010 2009 2008	13% 2% 10% 27%	24% - 11% 25%	11% - 8% 14%	19% 5% 33% 32%	5% - 5% 29%	17% - 13% 23%	10% 3% 33%* -
Better herd management / Better stocking rates	2011 2010 2009	20% 6% 18%	15% - 5%	27% - 4%	- - -	26% 8% 27%	28% - 34%	13% 12% -
Pasture Utilisation (Increase)	2011 2010 2009 2008	8% 6% 12% 26%	12% 5% 5% 26%	- - 21% 29%	6% 5% - 11%	15% 17% 9% 40%	- 8% 16% 27%	10% 5% - -
Productivity (Increase)	2011 2010 2009 2008	19% 6% 11% 17%	26% 10% 21% 17%	16% 5% 8% 18%	- 5% 33% 14%	23% 13% 18% 20%	17% - 3% 9%	23% 5% - -
Improved Stock health	2011 2010 2009 2008	7% 11% 11% 11%	- - - 13%	18% 18% 17% 18%	6% 5% - 11%	3% 17% 9% 11%	- 17% 9% 16%	7% 12% - -
Improved feed management	2011 2010 2009 2008	9% 3% 10% 10%	15% 5% 16% 17%	2% - 8% 7%	6% - - 7%	8% 4% 14% 9%	11% - 9% 18%	13% 5% - -
Profitability (Increase)	2011 2010 2009 2008	29% 18% 25% 9%	41% 20% 47% 4%	18% 27% 17% 4%	31% 10% - -	26% 8% 32% 9%	28% 17% 13% 11%	33% 22% 33%* -

Tier 2 Sample base 2008 *n=211*, 2009 *n=106*, 2010 *n=166*, **2011 *n=181*** (includes only respondents who mention positive outcomes)
*low sample base

(refer MLA KPI 2011 Tables Tier 2 - Table 86)

4.2.9 Rating of MLA Programs

As reported in the Tier 1 summary a question has been introduced into the KPI survey which aims to determine the **value of MLA communication and research adoption programs** to producers by asking them to rate the value of the program that they have participated in.

In order to represent the distribution of results a value has been assigned to the response range to generate a mean rating out of 3, respondents were given this value rating when the question was asked. In developing the rating model a 0 value has been included to allow respondents to answer with no value at all.

This rating measure asks producers to indicate if they placed a high or low value on the program being offered. The analysis model then applies a simple numeric rating out of 3 to the responses, where a **rating of 0 = no value** at all and a **rating of 3 = high value** or the top rating possible.

- q In tier 2 overall, **94%** of producers surveyed again indicated they rated the programs as **good or high value**, consistent with 92% in 2010 and 2009 and down slightly from 98% in 2008. This equates to a mean program value rating of **2.30**, consistent with 2010 and up on 2.27 in 2009. The result is slightly below 2.43 recorded in 2008.
- q This result is comprised of 38% of program participants who rated the programs they had experience with as high value and 56% as good value followed by 7% as little value. No tier 2 respondents rated programs as having no value at all (except 1 in southern beef). These program value results have improved since 2009 and reflect the effectiveness of MBfP, Beef Up Forums, MMfS and Evergraze participants in the 2011 tier 2 sample.

Table 26: Rating or Value of Programs Participated in during the last 12 months

		Total Sample:	Northern Beef	Southern Beef	Sheep / Lamb
High Value (3)	2011	38%	40%	35%	38%
	2010	40%	37%	44%	38%
	2009	37%	27%	43%	33%
	2008	46%	54%	48%	33%
Good Value (2)	2011	56%	53%	55%	58%
	2010	52%	56%	49%	51%
	2009	55%	61%	49%	58%
	2008	52%	45%	50%	62%
Little Value (1)	2011	7%	7%	9%	4%
	2010	7%	6%	6%	9%
	2009	8%	11%	7%	7%
	2008	2%	1%	1%	5%
No Value at all (0)	2011	-	-	1%	-
	2010	1%	1%	1%	2%
	2009	1%	-	-	1%
	2008	-	-	1%	-
Mean Value:	2011	2.30	2.33	2.25	2.34
	2010	2.30	2.29	2.36	2.24
	2009	2.27	2.16	2.36	2.24
	2008	2.43	2.54	2.44	2.27

Tier 2 sample 2008 n=295, 2009 n=200, 2010 n=295, 2011 n=272.

- q **94%** of program participants indicated they **would participate in a similar program again**, consistent with 93% in 2010 and 92% in 2009

(refer MLA KPI 2011 Tables Tier 2 - Table 46)

4.2.10 MLA Program element (Tools) most influential

Tier 2 survey respondents were specifically asked which element or **tools** of the MLA programs had the **most influence** on them.

- q **52%** of the **n=272** program participants indicated the **workshops** were most influential. This is down from 54% in 2010, 62% in 2009 and 70% in 2008.
- q **17%** of program participants indicated the **manual (CD Rom)** was the most influential element of the program they participated in (these will be MBfP and MMfS participants), up from 10% in 2010 and 25% in 2009. A further **25%** nominated the combination of the **workshop and manual**, up from 10% in 2010 and 11% in 2009.
- q **34% again** nominated the **Pasture Ruler**, similar to previous result of 34% in 2010 and 31% in 2009.
- q **40%** nominated **Feed Demand Calculator**, up from 31% in 2010 and 30% in 2009.
- q **44%** nominated **Feedback Magazine** down from 48% in 2010 and on par with 39% in 2009. **35%** said **Prograzier**, down from 38% in 2010 and on par with 34% in 2009.
- q **36%** nominated the **Stocking Rate Calculator**, up from 29% in 2010 and 25% in 2009.
- q **47%** nominated **COP Workshops**, up from 36% in 2010 and 32% in 2009.
- q **20%** nominated the **Rainfall to Pasture Growth Outlook Tool**, consistent with 21% in 2010 and 16% in 2009.

These initiatives are mostly undertaken **annually** or **monthly** a small percentage use them **weekly** where necessary.

Table 27: Influence of MLA Program Components

Program Components:	Survey Year	Most Influential element:	Monthly	Annually	Weekly
Workshop	2011	52%	13%	44%	-
	2010	54%	22%	50%	-
	2009	62%	16%	68%	1%
Manual (CD Rom)	2011	17%	33%	32%	3%
	2010	10%	35%	42%	2%
	2009	25%	39%	49%	3%
Pasture ruler	2011	34%	41%	12%	16%
	2010	34%	41%	26%	17%
	2009	31%	45%	32%	19%
Feedback Magazine	2011	44%	70%	4%	2%
	2010	48%	87%	6%	1%
	2009	39%	86%	5%	4%
Prograzier	2011	35%	51%	18%	2%
	2010	38%	67%	16%	2%
	2009	34%	64%	16%	6%
PIRD's/PDS	2011	-	-	-	-
	2010	36%	22%	56%	2%
	2009	32%	14%	70%	2%
Cost of Production (COP) Workshops	2011	47%	21%	43%	3%
	2010	36%	6%	45%	1%
	2009	32%	6%	68%	-
Stocking Rate Calculator	2011	36%	29%	27%	4%
	2010	29%	46%	38%	6%
	2009	25%	34%	56%	6%
Feed Demand Calculator	2011	40%	28%	25%	6%
	2010	31%	43%	29%	8%
	2009	30%	42%	31%	14%
MBfP Expos	2011	-	-	-	-
	2010	28%	5%	52%	-
	2009	24%	2%	81%	-
Rainfall to pasture growth outlook tool	2011	20%	22%	25%	11%
	2010	21%	33%	37%	5%
	2009	16%	34%	44%	6%

Tier 2 Sample 2009 n=200, 2010 n=294, 2011 n=272.

(refer MLA KPI 2011 Tables Tier 2- Tables 89-91)

4.3 Other Business insights - (2011 Tier 1 & Tier 2 Sample n=577)

4.3.1 Farm Business Priorities (Introduced in 2009)

All 2011 KPI survey participants were asked to rank their top 3 business priorities for the farm.

- q **Expansion and increasing the scale of production** is the top ranking business priority with **27%** of producers nominating it this as a priority, down from 34% in 2010 and 30% in 2009.
- q **27%** of all 2010 program participants surveyed indicate that **increasing efficiency** was a top business priorities, up from 26% in 2010 and in line with 27% in 2009.
- q **Profitability / Making Money** was nominated by **15%** of respondents as a priority, up from 13% in 2010 and 2009.

Table 28: Business Priorities

Farm Business Priorities:	% of Survey Participants ranking Priorities		
	2009 (n=500)	2010 (n=584)	2011 (n=577)
Expansion and increasing scale of production	30%	34%	27%
Increasing Efficiency	27%	26%	27%
Profitability / Making Money	13%	13%	15%
Maintain a holding pattern on the current level of production	26%	19%	15%
Planning for retirement	5%	9%	7%
Survive / The drought / Cyclone etc	10%	8%	6%
Succession Planning	5%	6%	4%
Sustainability / Environment management	4%	5%	4%
Pasture Improvement / management / regeneration	5%	5%	8%
Building skills and knowledge to better manage our business	6%	4%	7%
Improving quality of meat / stock	3%	4%	7%

Total Sample 2009 n=500, 2010 n=584, 2011 n=577.

Like other management changes these business priorities appear to be equally important within each of the MLA sample segments.

- q Tables 29 to 32 below outline each of the key producer segments response to business priorities, **increasing efficiency** and **expansion** continue to be the business priorities of livestock producers.
- q Some producers appear to favour a **holding pattern** as they cope with climatic/environmental and economic circumstances.

Table 29: Business Priorities by State

Farm Business Priorities:	% of Total KPI Survey Participants							
	2010 (n=584)	2011 (n=577)	NSW/ ACT	VIC	QLD	SA/ NT	WA	TAS
Increasing Efficiency	26%	27%	25%	34%	26%	25%	21%	26%
Expansion and increasing scale of production	34%	27%	23%	34%	28%	29%	21%	29%
Profitability / Making Money	13%	15%	12%	15%	14%	11%	20%	26%
Maintain a holding pattern on the current level of production	19%	15%	15%	12%	9%	21%	19%	26%
Planning for retirement	9%	7%	6%	5%	11%	7%	3%	13%
Survive / The drought / Cyclone etc	8%	6%	7%	2%	9%	3%	9%	3%
Succession Planning	6%	4%	2%	5%	4%	7%	4%	3%
Sustainability / Environment management	5%	4%	5%	4%	3%	1%	4%	6%
Pasture Improvement / management / regeneration	5%	8%	10%	10%	7%	5%	4%	6%
Building skills and knowledge to better manage our business	4%	7%	7%	8%	8%	8%	3%	13%
Improving quality of meat / stock	4%	7%	5%	9%	10%	5%	3%	3%

Total Sample 2010 n=584, 2011 n=577.

Table 30: Business Priorities by Northern Beef Producers

Farm Business Priorities:	% of Northern Beef Producer Survey Participants Property Scale – Based on Breeding Cow Numbers						
	2010 (n=173)	2011 (n=163)	Very Small <100	Small 100-399	Medium 400- 1,599	Large 1,600- 5,399	Very Large >5,400
Increasing Efficiency	32%	24%	29%	30%	24%	7%	30%
Expansion and increasing scale of production	39%	28%	14%	25%	37%	15%	35%
Profitability / Making Money	10%	12%	7%	10%	11%	26%	5%
Maintain a holding pattern on the current level of production	16%	11%	14%	10%	10%	11%	15%
Planning for retirement	9%	10%	29%	18%	8%	-	-
Survive / The drought / Cyclone etc	7%	9%	-	8%	11%	19%	-
Succession Planning	6%	4%	-	13%	2%	-	-
Sustainability / Environment management	3%	3%	7%	3%	3%	4%	-
Pasture Improvement / management / regeneration	3%	6%	14%	8%	8%	-	-
Building skills and knowledge to better manage our business	6%	7%	7%	3%	10%	7%	5%
Improving quality of meat / stock	3%	9%	7%	10%	11%	11%	-

Total Sample 2010 n=173, 2011 n=163.

Table 31: Business Priorities by Southern Beef Producers

Farm Business Priorities:	% of Southern Beef Producer Survey Participants Property Scale – Based on Breeding Cow Numbers						
	2010 (n=213)	2011 (n=202)	Very Small <100	Small 100-199	Medium 200-399	Large 400-799	Very Large >800
Increasing Efficiency	22%	25%	17%	32%	29%	22%	29%
Expansion and increasing scale of production	32%	24%	17%	27%	27%	19%	33%
Profitability / Making Money	12%	16%	17%	20%	13%	11%	14%
Maintain a holding pattern on the current level of production	20%	15%	17%	18%	15%	11%	5%
Planning for retirement	9%	7%	14%	5%	6%	7%	-
Survive / The drought / Cyclone etc	8%	4%	2%	5%	8%	4%	-
Succession Planning	5%	4%	3%	-	4%	11%	10%
Sustainability / Environment management	7%	5%	5%	7%	2%	11%	5%
Pasture Improvement / management / regeneration	7%	9%	10%	14%	12%	4%	-
Building skills and knowledge to better manage our business	3%	6%	5%	7%	8%	4%	10%
Improving quality of meat / stock	5%	8%	7%	7%	8%	7%	14%

Total Sample 2010 n=213, 2011 n=202.

Table 32: Business Priorities by Sheep / Lamb Producers

Farm Business Priorities:	% of Sheep / Lamb Producer Survey Participants Property Scale – Based on Lambs for Slaughter Numbers						
	2010 (n=198)	2011 (n=211)	Very Small <200	Small 200-499	Medium 500-999	Large 1,000-1,999	Very Large >2,000
Increasing Efficiency	26%	30%	29%	32%	35%	28%	29%
Expansion and increasing scale of production	32%	30%	29%	24%	25%	36%	35%
Profitability / Making Money	16%	16%	16%	16%	15%	17%	15%
Maintain a holding pattern on the current level of production	19%	17%	24%	16%	10%	17%	19%
Planning for retirement	10%	5%	5%	8%	5%	4%	2%
Survive / The drought / Cyclone etc	8%	5%	3%	5%	10%	6%	2%
Succession Planning	6%	4%	5%	3%	5%	2%	6%
Sustainability / Environment management	5%	3%	3%	-	-	6%	4%
Pasture Improvement / management / regeneration	6%	8%	5%	5%	10%	6%	10%
Building skills and knowledge to better manage our business	4%	9%	13%	16%	10%	2%	6%
Improving quality of meat / stock	4%	4%	3%	11%	-	6%	-

Total Sample 2010 n=198, 2011 n=211.

(refer MLA KPI 2011 Tables Combined Tier 1 & Tier 2 - Table 34)

4.3.2 Internal and External threats (introduced in 2009)

All KPI survey participants were asked to identify the **internal** and **external** threats facing their farm businesses.

77% of producer respondents again nominated **internal** threats, consistent with 77% in 2010 and 76% in 2009. **96%** nominated **external** threats, up from 93% in 2010 and 2009 and further highlighting the consistent polarisation of opinion being collected by the surveys sample structure.

Internal:

- q **27%** nominated **cost of production**, consistent with 31% in 2010 and 32% in 2009.
- q **17%** nominated the **disease / animal health concerns**, up from 14% in 2010 and 10% in 2009.
- q **11%** nominated **cash flow**, consistent with 11% in 2010 and down from 13% in 2009.
- q **8%** nominated **family issues (health, age etc)**, similar to 7% in 2010.
- q **7%** again nominated **labour efficiency**, consistent with 7% in 2010 and down from 12 % in 2009.

External:

- q **32%** nominated **government taxes**, up from 20% in 2010 and 2009.
- q **25%** nominated **price received**, down from 36% in 2010 and 29% in 2009.
- q **24%** nominated **drought**, down from 33% in 2010 and 30% in 2009 (reflects improved conditions).
- q **19%** nominated **markets / diminishing returns**, significant increase on 9% in 2010.
- q **15%** nominated **climate change / weather**, down from 18% in 2010 and 29% in 2009.
- q **13%** nominated **the loss of the live export market to Indonesia**.

Interestingly, 5% of respondents nominated a **carbon tax** or **offset trading scheme** compared with none in 2010 and 13% in 2009.

(refer MLA KPI 2011 Tables Combined Tier 1 & Tier 2 - Table 35)

4.3.3 Confidence in Red Meat Industry (introduced in 2009)

KPI survey participants were also asked to indicate the level of **confidence** they had with the future of the red meat industry.

- q **69%** of participants indicated they had some **positive confidence** in red meat industry representing a consistent trend from 70% in 2010 and 69% in 2009.
 - o **33% extremely confident**, down from 35% in 2010 and up from 27% in 2009.
 - o **36% some confidence**, up from 35% in 2010 and down from 42% in 2009.
- q **21%** indicated they were **unsure** about the level of confidence they had, an increase on 18% in 2010 and down from 25% in 2009.
- q **10%** of participants indicated they were **not confident** in red meat industry, down from 11% in 2010 and up from 6% in 2009.
 - o **6% not confident**, down from 8% in 2010 and up from 5% in 2009.
 - o **3% not at all confident**, down from 4% in 2010 and up from 1% in 2009.

This created a mean confidence level of **3.89**, slightly down on 3.91 in 2010.

(refer MLA KPI 2011 Tables Combined Tier 1 & Tier 2 - Table 36)

4.3.4 Information sources for advice on New technologies or practices

All 2011 KPI survey participants were asked **who** they **relied on** for advice or information relating to applying or using new technologies or management practices for the farm. The results show **consistent trends** and an increase in certain channels.

- q **77%** of all 2011 course participants surveyed now say that **other graziers** are their main source of advice, up from 74% in 2010.
- q **60%** still rely on the **DPI** for information and advice, consistent with 58% in 2010.
- q **Feedback Magazine** and **MLA** are both sources of advice and information for a significant % of the producer population, **50%** and **48%** respectively.

Table 33: Preferred Sources of Advice on New Technology by State

Information Sources:	% of Total KPI Survey Participants							
	2010 (n=584)	2011 (n=577)	NSW/ ACT	VIC	QLD	SA/ NT	WA	TAS
Other Graziers	74%	77%	71%	85%	74%	71%	83%	84%
DPI	58%	60%	68%	52%	63%	52%	63%	58%
Rural Merchandise Outlets	58%	59%	51%	61%	61%	65%	59%	68%
Newspapers	55%	60%	59%	68%	53%	55%	57%	84%
Feedback Magazine	53%	50%	50%	51%	44%	52%	51%	71%
Meat & Livestock Australia	52%	48%	49%	57%	41%	48%	44%	52%
ABC Radio	48%	57%	51%	53%	54%	63%	64%	74%
Internet	47%	54%	61%	50%	41%	67%	60%	48%
Producer Meetings	47%	53%	51%	61%	50%	53%	49%	42%
Family Members	45%	51%	45%	52%	54%	44%	59%	68%
Vets	8%	6%	6%	8%	4%	7%	1%	10%
Private Consulting Agronomist	7%	9%	13%	11%	2%	11%	11%	-
Field Days	6%	3%	5%	5%	1%	3%	3%	3%
Training Courses	5%	2%	4%	3%	-	1%	-	-
Private Farm Consultants	3%	6%	9%	6%	2%	5%	7%	-

Total Sample, 2010 n=584, 2011 n=577.

This data outlines the continuing breadth of available channels for MLA to communicate with targeted producer segments, LPI's ability to use these channels will impact on the KPI's being measured by this survey.

The **internet** is becoming more widely used as **54%** of producers now choose to get information from the various sources available on-line.

Producers still appear to rely on many sources of information for advice, this question was multi response and most nominated up to **5 preferred sources**.

Table 34: Preferred Sources of Advice on New Technology by Northern Beef Producers

Information Sources:	% of Northern Beef Producer Survey Participants Property Scale – Based on Breeding Cow Numbers						
	2010 (n=173)	2011 (n=163)	Very Small <100	Small 100-399	Medium 400-1,599	Large 1,600-5,399	Very Large >5400
Other Graziers	78%	75%	64%	73%	77%	63%	95%
DPI	59%	55%	43%	55%	53%	48%	75%
Rural Merchandise Outlets	51%	61%	64%	60%	60%	63%	60%
Newspapers	53%	51%	57%	48%	56%	48%	40%
Feedback Magazine	59%	42%	29%	43%	44%	48%	40%
Meat & Livestock Australia	51%	40%	36%	35%	42%	37%	55%
ABC Radio	51%	55%	57%	50%	58%	56%	55%
Internet	46%	46%	29%	40%	50%	44%	60%
Producer Meetings	54%	51%	50%	45%	52%	56%	55%
Family Members	51%	54%	36%	50%	56%	59%	60%
Vets	6%	4%	14%	3%	-	7%	5%
Private Consulting Agronomist	3%	2%	-	5%	3%	-	-
Field Days	8%	1%	7%	-	-	-	-
Training Courses	6%	-	-	-	-	-	-
Private Farm Consultants	2%	2%	-	5%	2%	-	-

Total Sample, 2010 n=173, 2011 n=163.

The fall in reliance on **field days** and **training courses** is of some concern but may reflect recent activity rather than general satisfaction with these activities.

Table 35: Preferred Sources of Advice on New Technology by Southern Beef Producers

Information Sources:	% of Southern Beef Producer Survey Participants Property Scale – Based on Breeding Cow Numbers						
	2010 (n=213)	2011 (n=202)	Very Small <100	Small 100-199	Medium 200-399	Large 400-799	Very Large >800
Other Graziers	71%	76%	62%	77%	81%	85%	86%
DPI	57%	61%	50%	59%	67%	59%	52%
Rural Merchandise Outlets	55%	55%	48%	59%	56%	48%	71%
Newspapers	57%	58%	52%	57%	67%	59%	57%
Feedback Magazine	50%	52%	41%	50%	67%	56%	48%
Meat & Livestock Australia	52%	47%	38%	41%	50%	52%	67%
ABC Radio	45%	55%	57%	59%	56%	33%	67%
Internet	44%	50%	36%	41%	62%	52%	81%
Producer Meetings	46%	49%	34%	50%	58%	52%	62%
Family Members	40%	47%	50%	39%	46%	52%	52%
Vets	11%	7%	2%	9%	10%	7%	10%
Private Consulting Agronomist	10%	12%	10%	7%	12%	11%	29%
Field Days	8%	4%	3%	5%	6%	4%	-
Training Courses	8%	2%	3%	2%	4%	-	-
Private Farm Consultants	3%	7%	9%	5%	4%	7%	19%

Total Sample 2010 n=213, 2011 n=202.

Table 36: Preferred Sources of Advice on New Technology by Southern Sheep / Lamb Producers

Information Sources:	% of Sheep / Lamb Producer Survey Participants Property Scale – Based on Lambs for Slaughter Numbers						
	2010 (n=198)	2011 (n=211)	Very Small <200	Small 200-499	Medium 500-999	Large 1,000- 1,999	Very Large >2,000
Other Graziers	74%	80%	66%	79%	85%	83%	83%
DPI	59%	63%	53%	66%	68%	64%	65%
Rural Merchandise Outlets	67%	63%	61%	71%	70%	62%	52%
Newspapers	55%	68%	53%	74%	70%	68%	75%
Feedback Magazine	52%	55%	39%	47%	65%	55%	63%
Meat & Livestock Australia	52%	56%	50%	50%	63%	53%	65%
ABC Radio	51%	60%	45%	63%	70%	60%	60%
Internet	51%	64%	66%	68%	58%	66%	60%
Producer Meetings	40%	57%	39%	58%	55%	66%	65%
Family Members	45%	54%	47%	61%	48%	55%	56%
Vets	5%	6%	8%	8%	5%	9%	2%
Private Consulting Agronomist	6%	10%	11%	11%	13%	11%	8%
Field Days	2%	5%	5%	5%	3%	6%	4%
Training Courses	1%	2%	3%	3%	3%	2%	2%
Private Farm Consultants	5%	7%	8%	5%	3%	15%	2%

Total Sample, 2010 n=198, 2011 n=211.

(refer MLA KPI 2011 Tables Combined Tier 1 & Tier 2 - Table 37)

5 Conclusions and Recommendations

5.1 Conclusions

The objective of the KPI Survey is to evaluate the performance of the LPI communication and extension programs or activities by measuring the level of awareness achieved amongst the general producer population, and the adoption by activity participants of the management practices and knowledge being advocated within these programs.

Overall **Awareness** of MLA courses has risen significantly from 74% in 2005 to **90% in 2011**, in 2010 it reached 92%. This 90%+ level of awareness has been consistently reported for several survey intervals and is reflected in overall activity awareness in each of the producer segments.

Overall, **90%** of targeted livestock producers recall one or more of the MLA activities, representing a **sustained** level of awareness amongst targeted producers. Recent KPI surveys has shown this figure to be the upper limit of awareness with limited opportunity for improvement. However, unaided awareness which reflects top of mind awareness, can be improved on, currently improving at **53%**, up from 51% on last year with scope to increase further.

Again as few as **10%** of respondents were unaware of any MLA activities, this is an improvement on **15%** from the 2008 survey, however it does reinforce the message that there will always be some producers who don't engage with progress and innovation.

Membership status is an obvious **advantage** for communication with almost all data tables showing better than average performance amongst this segment. In 2011, **68%** of targeted livestock producers indicated they were MLA Members (received Feedback magazine), this figure is down from 77% reported in 2010 and 71% in 2009 and well below 85% reported in 2008. This is **concerning** as previous surveys suggested a return to the 2008 situation where membership levels were quite high.

Improving on this relatively high level of awareness will be difficult as barriers to awareness will always exist amongst a minority proportion of producers. However, there are signs that improvement in MLA e-newsletter services and other communication initiatives will serve to provide producers with every opportunity to become aware of improved management practices.

Implementation of management practice changes as a result of participation in MLA activities has been falling consistently from 67% in 2006 to 64% in 2007 and 2008. In 2011 management practice change amongst activity participants is at **70%** representing a significant improvement in program efficacy, previous surveys in 2010 and 2009 reported 59%.

The process of changing management practices appears to be increasing as more favourable seasons allow producers to implement change. A significant improvement in the lamb and wool market is also reflected in producers adoption of changes and practices that impact on productivity and profitability, much of this using pasture management strategies.

As mentioned in previous summary's the significant number of management practices being monitored and the subtle differences in many do result in confusion. To limit this confusion the survey must endeavor to provide clear definitions of each management practice and measure producer implementation. To achieve this the survey must ensure management practices are consistent with what is being measured.

Many respondents continue to identify their neighbours as the primary source of advice for new technology, this will continue to ensure that adoption of MLA promoted practices will eventually find their way into most livestock enterprises.

In the **longer term** producers expressed increased confidence in the red meat industry, they are continue to be concerned with internal factors including **cost of production, disease** and **cash flow**, and regard external influences such as **government taxes** and the **price received** for commodities as just as concerning.

5.2 Recommendations

For previous surveys these recommendations discussed the marketing and promotion of activities to targeted producers as a primary mechanism to meet awareness and participation targets. Following the 2011 survey these initiatives should continue, as the survey shows reaching a high level of awareness means that a change in practice or a poorly thought out campaign can only result in a downward trend. Maintaining a 90% awareness does become challenging.

However there is an opportunity to keep this high level of awareness going by aiming to increase the level of unaided awareness amongst for core activity streams. With so many programs being promoted there is confusion surrounding activity names, recent surveys have identified some emerging brands or easily recognised programs such as MBfP, COP, MMfS and PDS/PIRD's. Then there is of course Edge, a very successful brand that continues to have a high awareness level despite less on the ground activity across it's many program components.

Variations on existing course names should be avoided if clear recognition and awareness is to be an ongoing KPI for LPI.

The significant increase in the adoption of management change from 59% to 70% is a function of MLA programs and activities as well as the environmental constraints producers must operate in. As was mentioned in last years summary the receding drought conditions opened the way for improved adoption, this has clearly happened despite some other local issues such as flooding and other weather events.

Many producers surveyed believe that they have already adopted the obvious management changes, to this end the tier 1 measurement of management practices across industry will become ever more significant element of the KPI survey? Also the introduction of more innovation will assist in keeping change at the forefront of the industry and synonymous with MLA programs.

To achieve a **continuing increase in management change** amongst activity participants Axiom believe MLA must:

- q Continue to encourage program attendance at a local level and promote relevance for local producers. The continued focus should be on efficiency, productivity and most importantly **profit**.
- q Program and activity names are the **brands** of this enterprise and as such need **continuity**. Repeating recognised courses with new content will achieve more in terms of achieving KPI's than launching new course names and initiatives.
- q Encouraging producers to participate in more than one program will help reinforce management practices and their effective implementation. **Restructure** the learning processes so that **follow up participation** and attendance is an attractive option for producers seeking to improve performance.
- q Membership continues to provide a marginally better result, both in achieving awareness and management change. Encouraging producers to take up membership will improve MLA outcomes, if only by guaranteeing a communication channel directly associated with innovation and improved management.

Axiom has long been championing the improvement of the MLA database of course participants, clearly progress has been made within MLA on this front. However, some course co-ordinators continue to provide incomplete information on participants or no information at all. Any information gaps severely limits the effectiveness of database driven initiatives and undoubtedly misrepresents the overall effectiveness of the programs and activities that MLA is engaged in.

Axiom envisage that future Tier 2 surveys can be undertaken using direct communication with all program participants providing a virtual audit of annual activities. Web based survey mechanisms are now widely used and are especially effective with contacts where a relationship already exists. This approach may still be a few years away but it will be a more cost effective mechanism with which to measure the performance of programs and courses.

6 Appendices

The following appendices have been attached to this report and include further data from the 2011 KPI survey.

6.1 Appendix 1 Main data file(s) details

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:

- q **MLA KPI 2011 Tables Tier 1**
- q **MLA KPI 2011 Tables Tier 2**
- q **MLA KPI 2011 Tables Combined Tier 1 & Tier 2**

This report can be referenced using file name: MLA Awareness & Adoption KPI Evaluation 2011

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

6.2 Appendix 2 – 2011 Questionnaire

The **2011** survey incorporates many enhancements from previous surveys however it retains the core KPI evaluation questions as well as the same profiling and segmentation protocols to ensure continuity of data and population representation. Minor changes include a broader course profile and the business threats section.

MLA TARGET PRODUCER 2011 KPI AWARENESS & ADOPTION SURVEY

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. You are free to not answer certain questions if you deem the question inappropriate.

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

INTRO Q#4. IF YOU HAVE RECENTLY PARTICIPATED IN AN MLA SURVEY, WOULD YOU LIKE TO CONTINUE?

YES	01	CONTINUE 'Thanks for your help, your time is appreciated'.
NO	02	TERMINATE 'Thanks for your help, your time is appreciated'. (exclude from quota)

Screeners:

SC.Q1. IS YOUR TOTAL FARM INCOME FROM AGRICULTURAL OPERATIONS MORE THAN **20,000** DOLLARS?

YES	01	CONTINUE
NO	02	TERMINATE IF LESS THAN \$20K - THANK & CLOSE

SC.Q1.1 WHICH OF THESE **FARM INCOME BRACKETS** DO YOU NORMALLY FIT INTO?

DO NOT READ OUT

20K – 50K	01
51K – 100K	02
101K – 150K	03
150K – 200K	04
> 200K	05
Don't Know TERMINATE	99

MAY I PLEASE ASK SOME PROFILING QUESTIONS ABOUT YOUR PROPERTY.

SC.Q2. AS AT JULY 2011 WHAT IS THE TOTAL AREA OF YOUR PROPERTY, INCLUDING ANY LEASED LAND? THIS INCLUDES ALL GRAZING, CROPPING AND 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

DP Note: SC.Q2. TO BE CODED IN HECTARE RANGES AS PREVIOUS 2009 & 2010 SURVEY.

SC.Q3 OF YOUR (INSERT SC.Q2 AREA) WHAT AREA OF YOUR PROPERTY WAS.....

<i>Read out</i>	ACRES	HECTARES
Under crop or fallow about to be sown		
Under perennial pasture		
Under annual pasture		
Under native pasture		

DP Note: SC.Q3. TO BE ENTERED INTO TABLES AS HECTARES.

SC.Q4. DO YOU RECEIVE A COPY OF 'FEEDBACK' MAGAZINE FROM MEAT AND LIVESTOCK AUSTRALIA? RECORD RESPONSE BELOW

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

SC.Q5. Interviewer note: check contact database source to determine question stream

Origin of Contact:	TIER		
FARMbase (Random sample of pop.)	1	ASK Section 1, 2	n=305
EDGE/MBfP/PIRDS/PRIME TIME/COST OF PRODUCTION (COP)/BEEF UP/MAKING MORE from Sheep (MLA Course Participant Sample)	2	ASK Section 1, 3	n=280

(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).

SC.Q6. 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	Sheep	State:

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

INDUSTRY SEGMENTATION

SECTION 1: ASK ALL RESPONDENTS (TIER 1 & TIER 2)

Q1.1 IN THE LAST FINANCIAL YEAR (2010 – 2011), 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". These can also be included in another category.
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 10% minimum refers to respondents largest farm enterprise, i.e. where no other **livestock** enterprise contributes greater than 10% to gross farm income then that enterprise is how the respondent is classified for the purpose of this survey. Respondents do not qualify for the survey if Dairy, winter cereal or other crops add to more than 95% of farm income).*

IF Q1.1=BEEF Ask Q1.2 and Q1.3, **IF Q1.1=SHEEP** Go to Q1.4, **IF Q1.1 = GOATS** Go to Q1.6

Q1.2 WHAT WAS THE MOST NUMBER OF **BEEF CATTLE**, INCLUDING MARKED CALVES, THAT YOU CARRIED ON YOUR PROPERTY DURING **2010-2011**?

Q1.3 AND, HOW MANY OF THOSE WERE BREEDING COWS?
(includes all cows and heifers)

WRITE IN NUMBER OF BEEF CATTLE AND CIRCLE RESPONSE

	Q1.2 Beef Cattle	Q1.3 Breeding Cows
< 100	01	01
100 – 200	02	02
201 – 400	03	03
401 – 800	04	04
801 – 1600	05	05
1601 – 5400	06	06
> 5400	07	07

(DP note: Create banner based on Property Scale below for Northern & Southern producers – use Q1.3 codes to create banners).

(N=total population – based on breeding cows)

Property Scale	Northern	Q1.3 Codeframe	Southern	Q1.3 Codeframe
Very small	<100 (N=2628)	01	<100 (N=10166)	01
Small	100 – 400 (N=3443)	02, 03	100 – 200 (N=13699)	02
Medium	400 – 1600 (N=2843)	04,05	200 – 400 (incl above)	03
Large	1600 – 5400 (N=1395)	06	400 – 800 (N=4594)	04
Very Large	>5400 (N=398)	07	>800 (N=2075)	05, 06, 07

Q1.4 DURING 2010-2011, CAN YOU TELL ME WHAT WAS THE MOST NUMBER OF SHEEP, INCLUDING MARKED LAMBS, YOU CARRIED ON THE PROPERTY?

Q1.5 AND FROM THAT TOTAL, HOW MANY LAMBS FOR SLAUGHTER (FOR MEAT PURPOSES) WERE ON THE PROPERTY?

ENTER NUMBER IN APPROPRIATE CELL AND CIRCLE RESPONSE

WRITE IN NOS & CIRCLE CODE	Q1.4		Q1.5	
	TOTAL SHEEP Nos		LAMBS for SLAUGHTER Nos	
< 200		01		01
201 – 500		02		02
501 – 1,000		03		03
1,001 – 2,000		04		04
2,001 – 5,000		05		05
5,001 – 10,000		06		06
> 10,000		07		07

(DP note: Create banner based on Property Scale below – use Q1.5 codes to create banners).

(N=total population – based on lambs for slaughter, Southern only)

Property Scale	Lambs for slaughter	Q1.5 Codeframe
Very small scale farms	<200 (n=5553)	01
Small scale farms	200 – 500 slaughter lambs (n=6516)	02
Medium scale farms	500 – 1000 slaughter lambs (n=6161)	03
Large scale farms	1000 – 2000 slaughter lambs (n=3293)	04
Very large scale farms	More than 2000 slaughter lambs (n=1516)	05, 06, 07

Q1.6 HOW MANY MEAT GOATS WERE ON THE PROPERTY DURING 2009-2010?

ENTER NUMBER IN APPROPRIATE CELL AND CIRCLE RESPONSE

WRITE IN NOS & CIRCLE CODE	TOTAL Goat Nos	
< 30		00
30 – 499		01
500 – 999		02
1,000 – 1,999		03
2,000 – 4,999		04
5,000 – 9,999		05
10,000 – 20,000		06
> 20,000		07

(DP Note: TIER 2 Respondents Skip to Q3.1. TIER 1 Respondents Continue with Q2.1)

AWARENESS OF MLA PROGRAMS

SECTION 2: ASK TIER 1 SAMPLE ONLY (FARMBASE PRODUCERS n=305)

Q2.1 MEAT & LIVESTOCK AUSTRALIA (MLA) DEVELOPS AND IN SOME CASES RUNS A RANGE OF ACTIVITIES FOR BEEF, SHEEP, LAMB AND GOAT PRODUCERS. COULD YOU PLEASE TELL ME WHICH MLA ACTIVITIES 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 ACTIVITIES, COURSES & PROGRAMS TO YOU, WHICH MLA FUNDS. HAVE YOU HEARD OF...

FOR ALL SAMPLE: (read out)

WHAT ABOUT ‘PIRD’S or PRODUCER DEMONSTRATION SITES’, ‘PRODUCER RESEARCH SUPPORT’, ‘EDGE’ or ‘EDGE Network’?

AND

IF NSW, Southern WA, Vic, SA or TAS: (read out)

WHAT ABOUT MAKING MORE FROM SHEEP’, ‘MORE BEEF from PASTURES’ or ‘PROGRAZE’, EVERGRAZE and GRAIN & GRAZE?.

IF VIC or SA: (read out)

WHAT ABOUT, ‘PROGRAZE’, ‘BEEF CHEQUE’ & ‘LAMB CHEQUE’?

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

WHAT ABOUT BEEF UP FORUMS , ‘GRAZING LAND MANAGEMENT or GLM’ and ‘NUTRITION EDGE’ or ‘BREEDING EDGE’ and MAKING MORE FROM SHEEP (southern Qld only for the north)

Awareness:	Unaided		Aided
	Q2.1 First Mention	Q2.2 Other Mentions	Q2.3 Prompted
MLA Course Code			
PIRDS/PDS (PIRDS or Producer Research Support (ALL producers) and PDS or Producer Demonstration Sites North only)	01	01	01
EDGE Network (any EDGE or EDGE Network course) (ALL producers)	02	02	02
Prime Time	03	03	03
More Beef from Pastures (More Beef from Pastures Manuals and Forums, field days)- Southern Beef producers only	04	04	04
Cost of Production (COP)	05	05	05
Beef -Up forums (Northern beef only)	06	06	06
MAKING MORE from SHEEP (Separate sheep program – joint MLA/AWI funded).	07	07	07
Grain and Graze	08	08	08
Evergraze	09	09	09
Bestwool/Bestlamb	10	10	10
	11	11	11
	12	12	12
OTHERS (Please Specify) to be coded	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. Key piece of information required is to represent % of Tier 1 sample who are aware of at least 1 MLA program).

ASK Q2.4 to Q2.6 ONLY IF Q2.1, Q2.2 or Q2.3 is not null, If Q2.1, Q2.2 or Q2.3 is null Go To Section 5, Q5.1

Q2.4 HAVE YOU ATTENDED ANY OF THESE MLA ACTIVITIES IN THE LAST 12 MONTHS, OR PRIOR TO THE LAST 12 MONTHS?

DO NOT READ OUT

Yes (participated in at least 1 course or program in last 12 months)	01
Yes (attended at least 1 program prior to the last 12 months)	02
No (Never attended)	03

(DP Note: Also show Nett Yes results for Q2.4 in tables)

IF Q2.4=03 Ask Q2.5, if Q2.4 = 01 or 01 got to Q2.6.

Q2.5 IF YOU DID NOT ATTEND ANY OF THESE MLA ACTIVITIES, WHAT WERE YOUR REASONS FOR NOT PARTICIPATING?

DO NOT READ OUT

Do not like group activities	01
Did not know about them	02
No time	03
Too expensive	04
Drought	05
Topics of no interest	06
Other (Please Specify)	07
Don't know	99

Q2.6 HOW DO YOU RATE THE VALUE OF THE INDIVIDUAL MLA SUPPORTED ACTIVITIES, THAT YOU HAVE HAD EXPERIENCE WITH? ON A SCALE OF 0 to 3 WHERE 0 EQUALS NO VALUE AT ALL AND 3 EQUALS HIGH VALUE.

DO NOT READ OUT

High Value	03
Good Value	02
Little Value	01
No Value at all	00

(Int note: value refers to whether or not the event met respondents expectations and was worth the time/cost to them attending)

Q2.7 MLA PROGRAMS AND COURSES PROMOTE TOOLS TO ASSIST WITH IMPROVING PRODUCTION, WHICH KEY MLA TOOLS ARE YOU AWARE OF? (UNPROMPTED)

Q2.8 ARE YOU AWARE OF (PROMPTED - READ OUT REMAINING TOOLS NOT ALREADY MENTIONED)?

MLA TOOLS	Q2.7 Unprompted Awareness		Q2.8 Prompted Awareness	
	Yes	No	Yes	No
MBfP &/or MMFS MANUAL (CD Manual)	01	02	01	02
BEEFSPECS CALCULATOR	01	02	01	02
HEALTH COST BENEFIT CALCULATOR	01	02	01	02
CALVING HISTOGRAM CALCULATOR	01	02	01	02
COST OF PRODUCTION (COP) CALCULATORS (SHEEP/BEEF)	01	02	01	02
FEED DEMAND CALCULATOR	01	02	01	02
STOCKING RATE CALCULATOR	01	02	01	02
FEED BUDGET AND ROTATION PLANNER (FROM EVERGRAZE PROGRAM)	01	02	01	02
PASTURE IMPROVEMENT CALCULATOR (ALSO FROM EVERGRAZE PROGRAM)	01	02	01	02
PASTURE PICKER TOOL	01	02	01	02
PASTURE RULER	01	02	01	02
RAINFALL TO PASTURE GROWTH OUTLOOK TOOL	01	02	01	02
PHOSPHORUS TOOL	01	02	01	02
FEEDBACK MAGAZINE	01	02	01	02
FRONTIER MAGAZINE (NORTHERN ONLY)	01	02	01	02
PROGRAZIER (SOUTHERN ONLY)	01	02	01	02
OTHER (Specify)	01	02	01	02

TIER 1: ASK ONLY Q2.9 FOR ALL TIER 1 RESPONDENTS

Q2.9 WHICH OF THE FOLLOWING MANAGEMENT PRACTICES DO YOU CURRENTLY UNDERTAKE ON YOUR PROPERTY?

Management Practice Changes.....prompt only to clarify answer.	Q2.9	Q2.9.1 Evidence Add on Questions.
CALCULATE COST OF PRODUCTION (COP) \$/head, \$/kg or \$/hectare	01	Q. WHAT IS YOUR CURRENT COP? (enter as \$/head, \$/kg or \$/hectare)
Measure weaning %	02	Q. WHAT WAS YOUR LATEST RESULT? (%) Q. WHAT WAS YOUR PREVIOUS RESULT? (%)
Measure mortality % (rates)	03	Q. WHAT WAS YOUR LATEST RESULT? (%) Q. WHAT WAS YOUR PREVIOUS RESULT? (%)
Track for a particular market for livestock based on average age at sale time	04	Q. WHAT IS THE AVERAGE AGE AT SALE OF STOCK? (Yrs/Months)
Measure and adjust stocking rate	05	Q. WHAT IS YOUR CURRENT STOCKING RATE? (Lsu/Dse?)
USE EBV'S or ASBV's OR INDEX VALUES IN SIRE SELECTION OR PURCHASE	07	Q. WHAT EBV / or ASBV IS MOST IMPORTANT TO YOU?
ROUTINELY WEIGH LIVESTOCK TO MONITOR GROWTH/WEIGHT GAIN	08	Q. HOW OFTEN? (..... # TIMES PER YEAR)
FAT SCORE OR CONDITION SCORE STOCK AT JOINING	09	
FAT SCORE OR CONDITION SCORE STOCK AT LAMBING	10	
FAT SCORE OR CONDITION SCORE STOCK AT CALVING	11	
FAT SCORE OR CONDITION SCORE STOCK AT SELLING	12	
USE A FORMAL MEASUREMENT TECHNIQUE TO ASSESS PASTURE AVAILABLE TO ANIMALS AT LAMBING / CALVING	13	Q. DO YOU USE A VISUAL ASSESSMENT, PASTURE RULER OR PLATE METRE?
SET GRAZING TARGETS TO DETERMINE STOCK MOVEMENT USING ROTATION LENGTH	14	Q. DO YOU USE A VISUAL ASSESSMENT OR SOME SORT OF SPREADSHEET OR CALCULATOR?
SET GRAZING TARGETS TO DETERMINE STOCK MOVEMENT USING PASTURE RESIDUES (GROUND COVER)	15	Q. DO YOU USE A VISUAL ASSESSMENT OR SOME SORT OF SPREADSHEET OR CALCULATOR?
SET GRAZING TARGETS TO DETERMINE STOCK MOVEMENT USING PASTURE AVAILABILITY	16	Q. DO YOU USE A VISUAL ASSESSMENT OR SOME SORT OF SPREADSHEET OR CALCULATOR?
SET GRAZING TARGETS TO DETERMINE STOCK MOVEMENT USING ANIMAL REQUIREMENTS	17	Q. DO YOU USE A VISUAL ASSESSMENT OR SOME SORT OF SPREADSHEET OR CALCULATOR?

Management Practice Changes..... <i>prompt only to clarify answer.</i>	Q2.9	Q2.9.1 Evidence Add on Questions.
ROUTINELY ASSESS PASTURE QUALITY E.G. DRY MATTER DIGESTIBILITY	18	Q. DO YOU USE VISUAL ASSESSMENT?
CALCULATE A FORAGE OR PASTURE BUDGET	19	Q. DO YOU DO THIS WEEKLY, FORTNIGHTLY, MONTHLY, ANNUALLY?
PREGNANCY TEST COWS ROUTINELY	20	Q. IN THE LAST YEAR, WHEN?
FIRST CALF HEIFERS MANAGED SEPARATELY TO THE MAIN BREEDER HERD	21	
CONDUCT A DRENCH RESISTANCE TEST IN THE LAST 5 YEARS (only ask sheep producers)	22	
MONITOR WORM EGG COUNTS TO PROVIDE A BASIS WHEN TO DRENCH SHEEP	23	Q. DO YOU TEST YOURSELF OR USE LAB SERVICES?
VACCINATE TO PREVENT THREE DAY SICKNESS (NORTH ONLY)	24	
VACCINATE TO PREVENT CLOSTRIDIAL DISEASES	25	
ROTATIONALLY GRAZE (ie REGULARLY MOVE THE SAME MOB)	26	Q. DO YOU DO THIS WEEKLY, FORTNIGHTLY, MONTHLY, ANNUALLY?
HAVE A WRITTEN/FORMAL FARM MANAGEMENT PLAN INCLUDING A WEED MANAGEMENT PLAN	27	Q. WHEN WAS IT COMPLETED/ REVISED? (date)
INCREASED THE % OF LAND SOWN TO PERENNIAL PASTURES	28	Q. WHAT % IN THE LAST 12 MONTHS? (% of Total Farm Area)
ASSESS LAND CONDITION USING THE ABCD FRAMEWORK (NORTH ONLY)	29	Q. WHEN WAS THE LAST TIME? (date) Q. FOR WHAT PURPOSE?
WET SEASON SPELL PADDOCKS ON A ROTATIONAL BASIS (NORTH ONLY)	30	
BURN REGULARLY TO CONTROL WOODY WEEDS AND NATIVES (NORTH ONLY)	31	Q. HOW REGULARLY? Q. WHEN WAS THE LAST TIME? (date)
DEVELOP A FORMAL SUCCESSION PLAN	32	Q. DID YOU DEVELOP THIS WITH AN EXTERNAL CONSULTANT? Q. IS THIS A WRITTEN PLAN?
OTHER (PLEASE SPECIFY)	99	

Q2.10 FOR HOW LONG HAVE YOU BEEN CARRYING OUT THESE MANAGEMENT PRACTICES?
(refer to those mentioned in Q2.9)

DO NOT READ OUT

1 Month	01
2 Months	02
2 – 6 Months	03
6 Months to 1 Year	04
1 – 2 Years	05
2 – 6 Years	06
More than 6 Years	07
Don't know	99

(DP Note: TIER 1 Respondents Skip to Q5.1, TIER 2 Respondents continue with Q3.1)

ADOPTION

SECTION 3: TIER 2 - PARTICIPANTS OF PIRDS/EDGE/MBfP/_/BEEF UP, MAKING MORE from SHEEP PROGRAMS AND CHANGE OF MGT PRACTICES: ASK ALL MLA COURSE CONTACTS ONLY (MLA SAMPLE n=280)

Q3.1 MEAT & LIVESTOCK AUSTRALIA (MLA) DEVELOPS AND IN SOME CASES 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 NAME FROM CONTACT LIST)?
 (DP Note: If Q3.1 is Null, TERMINATE and replace in sample)

Q3.1.1 WAS THERE ANYTHING IN PARTICULAR THAT YOU LEARNED FROM THIS MLA PROGRAM OR COURSE?

Int Note E.g. knowledge on better grazing and pasture management, using EBVs, etc – try to get what the key message was from the activity

(DP Note: code Q3.1.1 at conclusion of survey - Axiom)

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

Q3.2.1 WAS THERE ANYTHING IN PARTICULAR THAT YOU LEARNED FROM THESE MLA ACTIVITIES?

(DP Note: code Q3.2.1 at conclusion of survey - Axiom)

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

ASK ONLY FOR THOSE PROGRAMS MENTIONED IN Q3.1 & Q3.2 (ask in succession for each program)

MLA Course Codesee code frame	COURSE CODE	Q3.1 Attended	Q3.2 Other Attended	Q3.3 Changed	
				Yes	No
PIRDS (PIRDS or Producer Research Support and PDS or Producer Demonstration Sites North only)	01	01	01	01	02
EDGE Network (any EDGE or EDGE Network course)	02	02	02	01	02
Prime Time					
MORE BEEF from PASTURES (More Beef from Pastures Manuals and Forums, Tools for the time challenged expos)	04	04	04	01	02
Cost of Production Workshops					
Beef -Up forums	06	06	06	01	02
MAKING MORE from SHEEP (Separate sheep program – joint MLA/AWI funded).	07	07	07	01	02
Grain and Graze	08	08	08	01	02

Evergraze	09	09	09	01 02
Bestwool/Bestlamb	10	10	10	01 02
Bestprac	11	11	11	01 02
	12	12	12	01 02
OTHERS (Please specify		99	99	01 02

(DP Note: for Q3.3 Identify for tables those respondents who made any changes by ACTIVITY mentioned, ie create a nett change field)

ASK Q3.4 ONLY IF Q3.3 = 01, If Q3.3 = 02 Skip to Q3.5

Q3.4 DO YOU STILL USE THE NEW OR CHANGED PRACTICE OR TECHNOLOGY IN YOUR FARMS MANAGEMENT?

DO NOT READ OUT

Yes	01
No	02
Don't Know / Unsure	03

Q3.5 HOW DO YOU RATE THE VALUE OF THE MLA SUPPORTED ACTIVITIES, THAT YOU HAVE HAD EXPERIENCE WITH? ON A SCALE OF 0 to 3, WHERE 0 EQUALS NO VALUE AND 3 EQUALS HIGH VALUE.

DO NOT READ OUT

High Value	03
Good Value	02
Little Value	01
No Value at all	00

Q3.6 WOULD YOU PARTICIPATE AGAIN IN A SIMILAR ACTIVITY?

DO NOT READ OUT

Yes	01
No	02
Don't Know / Unsure	03

MANAGEMENT PRACTICE CHANGE

TIER 2: ASK ONLY FOR THOSE RESPONDENTS WHO ANSWERED YES (01) to Q3.3

Q3.8 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.	Insert Q3.1 Course Name	Insert Q3.2 Course Name
CALCULATE COST OF PRODUCTION (COP) \$/head, \$/kg or \$/hectare	01	01
Measure weaning %	02	02
Measure mortality % (rates)	03	03
Track for a particular market for livestock based on average age at sale time	04	04
Measure and adjust stocking rate	05	05
PAY FOR THE SERVICES OF A SPECIALIST ADVISOR (OTHER THAN ACCOUNTANT) AT LEAST ONCE PER YEAR	06	06
USE EBV'S OR INDEX VALUES IN SIRE SELECTION OR PURCHASE	07	07
ROUTINELY WEIGH LIVESTOCK TO MONITOR GROWTH/WEIGHT GAIN	08	08
FAT SCORE OR CONDITION SCORE STOCK AT JOINING	09	09
FAT SCORE OR CONDITION SCORE STOCK AT LAMBING	10	10
FAT SCORE OR CONDITION SCORE STOCK AT CALVING	11	11
FAT SCORE OR CONDITION SCORE STOCK AT SELLING	12	12
USE A FORMAL MEASUREMENT TECHNIQUE TO ASSESS PASTURE AVAILABLE TO ANIMALS AT LAMBING / CALVING	13	13
SET GRAZING TARGETS TO DETERMINE STOCK MOVEMENT USING ROTATION LENGTH	14	14
SET GRAZING TARGETS TO DETERMINE STOCK MOVEMENT USING PASTURE RESIDUES (GROUND COVER)	15	15
SET GRAZING TARGETS TO DETERMINE STOCK MOVEMENT USING PASTURE AVAILABILITY	16	16
SET GRAZING TARGETS TO DETERMINE STOCK MOVEMENT USING ANIMAL REQUIREMENTS	17	17

Management Practice Changes..... <i>prompt only to clarify answer.</i>	Insert Q3.1 Course Name	Insert Q3.2 Course Name
ROUTINELY ASSESS PASTURE QUALITY E.G. DRY MATTER DIGESTIBILITY	18	18
CALCULATE A FORAGE OR PASTURE BUDGET	19	19
PREGNANCY TEST COWS ROUTINELY	20	20
FIRST CALF HEIFERS MANAGED SEPARATELY TO THE MAIN BREEDER HERD	21	21
CONDUCT A DRENCH RESISTANCE TEST IN THE LAST 5 YEARS (only ask sheep producers)	22	22
MONITOR WORM EGG COUNTS TO PROVIDE A BASIS WHEN TO DRENCH SHEEP	23	23
VACCINATE TO PREVENT THREE DAY SICKNESS (NORTH ONLY)	24	24
VACCINATE TO PREVENT CLOSTRIDIAL DISEASES	25	25
ROTATIONALLY GRAZE (ie REGULARLY MOVE THE SAME MOB/)	26	26
HAVE A WRITTEN/FORMAL FARM MANAGEMENT PLAN INCLUDING A WEED MANAGEMENT PLAN	27	27
INCREASED THE % OF LAND SOWN TO PERENNIAL PASTURES	28	28
ASSESS LAND CONDITION USING THE ABCD FRAMEWORK (NORTH ONLY)	29	29
WET SEASON SPELL PADDOCKS ON A ROTATIONAL BASIS (NORTH ONLY)	30	30
BURN REGULARLY TO CONTROL WOODY WEEDS AND NATIVES (NORTH ONLY)	31	31
DEVELOP A FORMAL SUCCESSION PLAN	32	32
OTHER (PLEASE SPECIFY)	99	99

Q3.9 FOR HOW LONG HAVE YOU BEEN CARRYING OUT THESE MANAGEMENT PRACTICES?
(refer to those mentioned in Q3.9)

DO NOT READ OUT

1 Month	01
2 Months	02
2 – 6 Months	03
6 Months to 1 Year	04
1 – 2 Years	05
2 – 6 Years	06
More than 6 Years	07
Don't know	99

Q3.10 AS A RESULT OF IMPLEMENTING (ADOPTING) SOME OF THE RECOMMENDATIONS (MANAGEMENT PRACTICES) THAT MLA HAS BEEN PROMOTING IN THE PROGRAM YOU RECENTLY ATTENDED, HAVE THEY HAD A POSITIVE OR NEGATIVE IMPACT ON YOUR FARM BUSINESS? DO NOT READ OUT

A Very Negative Impact	01
Some Negative Impact	02
No Impact at all (Status Quo)	03
Some Positive Impact	04
A Very Positive Impact	05
Don't know	99

IF Q3.10=04 or 05 Ask Q3.11, IF Q3.10=01 to 02 Go to Q3.12, IF Q3.10=03 or 99 Go to Q3.13

Q3.11 WHAT WERE THE POSITIVE OUTCOMES FOR YOUR BUSINESS THAT RESULTED FROM ATTENDING THE COURSE OR USING THE INFORMATION?

Q3.12 WHAT WERE THE NEGATIVE OUTCOMES FOR YOUR BUSINESS THAT RESULTED FROM ATTENDING THE COURSE OR USING THE INFORMATION?

DP Note: Q3.10 Q3.11 Code frame

Positive (+ve) or Increase		Negative (-ve) or Decrease	
Profitability (increase)	01	Profitability (decrease)	11
Environment impact (positive)	02	Environment impact (negative)	12
Cost of Production (decrease)	03	Cost of Production (increase)	13
Pasture utilisation (increase)	04	Pasture utilisation (increase/decrease)	14
Lifestyle (improvement)	05	Lifestyle (decline)	15
Labour saving (efficiency)	06	Labour saving (inefficiency)	16
Productivity (increase, gain)	07	Productivity (decrease, decline)	17
Meeting market specs (efficiency)	08	Meeting market specs (inefficiency)	18
Weaning rates (increase)	09	Weaning rates (decrease)	19
Mortality rates (increase)	10	Mortality rates (decrease)	20
Other (Please Specify)	99	Other (Please Specify)	99

ASK Q3.13 ONLY FOR THOSE RESPONDENTS WHO ANSWERED No (02) to Q3.3

Q.3.13 WHY HAVE YOU NOT CHANGED PRACTICES AS A RESULT OF YOUR PARTICIPATION IN THIS ACTIVITY?

Still thinking about it	01
Need to talk to someone for further information/advice (if so who - neighbour, consultant, DPI, Stock agent, family other producers, other)	02
Does not suit existing operations	03
Lack of finance to make changes	04
Workload or labour issues	05
Uncertainty regarding outcomes or benefits	06
Drought/poor season	
Lifestyle choice	07
Other	99

SECTION 4: Tier 2 MLA TOOLS SECTION

Q4.1 to Q4.5 deleted.

(DP note: No need to ask specific MBfP & MMfS questions for 2010/2011 so we have deleted Q4.1 to 4.5)

ASK ALL TIER 2

Q4.6 AS A RESULT OF ATTENDING OR PARTICIPATING IN AN MLA PROGRAM, WHICH ELEMENTS OF THE PROGRAM MOST INFLUENCED YOU TO CHANGE MANAGEMENT PRACTICES?

Prompt with: ANY OTHERS? (read out remaining options)

MANUALS	01
WORKSHOPS	02
MANUAL & WORKSHOP (Combination)	03
BEEFSPECS CALCULATOR	04
HEALTH COST BENEFIT CALCULATOR	05
CALVING HISTOGRAM CALCULATOR	06
COST OF PRODUCTION (COP) CALCULATORS (SHEEP/BEEF)	07
FEED DEMAND CALCULATOR	08
STOCKING RATE CALCULATOR	09
FEED BUDGET AND ROTATION PLANNER (FROM EVERGRAZE PROGRAM)	10
PASTURE IMPROVEMENT CALCULATOR (ALSO FROM EVERGRAZE PROGRAM)	11
PASTURE PICKER TOOL	12
PASTURE RULER	13
RAINFALL TO PASTURE GROWTH OUTLOOK TOOL	11
PHOSPHORUS TOOL	12
	13
FEEDBACK MAGAZINE	14
FRONTIER MAGAZINE (NORTHERN ONLY)	15
PROGRAZIER (SOUTHERN ONLY)	16
OTHER (Specify)	99

DP: Loop Question 4.6 with Q4.7? (Banner to show results by course ie PIRDS, Edge, MBfP etc)

Q4.7 HOW OFTEN DO YOU USE (INSERT 4.6)?

(read out)

Weekly	01
Monthly	02
Annually	03
Don't Know	04

DEMOGRAPHICS

SECTION 5: ASK ALL (TIER 1 AND TIER 2)

Q5.1 WHAT ARE YOUR CURRENT BUSINESS PRIORITIES OR GOALS?

(Int: Record ONLY the Top 3 mentioned)

Expansion and increasing scale of production	01
Increasing efficiency	02
Building skills and knowledge to better manage our business	03
Maintain a 'holding pattern' on the current level of production	04
Decrease production/reduce scale	05
Planning for retirement	06
Succession planning	07
Getting out of farming totally	08
Don't Know	09
Other (Please Specify)	99

Q5.2 WHAT DO YOU PERCEIVE AS THE BIGGEST INTERNAL AND EXTERNAL THREATS TO YOUR BUSINESS?

(Int: Record ONLY those mentioned, enter others for possible inclusion into codeframe)

Internal		External	
Cash flow	01	Drought	11
Limited or no succession planning	02	Climate Change	12
Capital	03	Price Received	13
Scale	04		14
Labour efficiency	05		15
Costs of production	06		16
Animal production efficiency/performance (e.g.weaning rates)	07		17
Limited skills to capitalise on technology and manage climate variability	08		18
	09		19
	10		20
Other (Please Specify)	99	Other (Please Specify)	99

Q5.3 HOW CONFIDENT ARE YOU THAT THERE IS A FUTURE IN BEING A PRODUCER WITHIN THE RED MEAT INDUSTRY OF AUSTRALIA? ON A SCALE OF 1 to 5 (WHERE 1 IS NO CONFIDENCE AND 5 IS EXTREMELY CONFIDENT).

DO NOT READ OUT- MATCH RESPONSE WITH CODEFRAME

Not at all Confident	01
Not Confident	02
Unsure	03
Some Confidence	04
Extremely Confident	05
Don't know	99

Q5.4 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. **Prompt with...** MLA PUBLICATIONS SUCH AS FEEDBACK, PROGRAZIER, FRONTIER MAGAZINE, TIPS AND TOOLS, 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

Meat and Livestock Australia (MLA)	1
Department of Agriculture or Primary Industries	2
Private Consulting Agronomist	3
Private Consulting Nutritionist	4
Private Farm Consultant	5
Field Days	6
Producer Meetings	7
Training Courses	8
Rural Merchandise Outlets	9
Rural Reseller Nutritionist	10
Rural Reseller Agronomist	11
Consultant attached to a Rural Reseller	12
Vets	13
Bank / Finance Provider	14
Accountant	15
Family Members	16
Other Graziers	17
ABC radio	18
ABC TV	19
Commercial radio	20
Commercial TV	21
Newspapers	22
Feedback magazine	23
Industry organization newsletters	24
Information mailed directly to you	25
The Internet / websites	26
Other	99

ASK ALL

AND FINALLY, JUST A COUPLE OF QUESTIONS TO MAKE SURE WE HAVE INTERVIEWED A REPRESENTATIVE SAMPLE OF PRODUCERS.

Q5.5 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

Q5.6 RECORD GENDER OF RESPONDENT

DO NOT READ OUT

Male	1
Female	2

CLOSE:

THANK YOU FOR YOUR HELP. GOODBYE

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 FOR Q3.1 – Q3.2**

PIRD's = 01	PIRD's (Producer Initiated Research & Development) or demonstration trials.
	PRS or Producer Research Support
	PDS or Producer Demonstration Sites
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®
	The Breeding EDGE (<i>Nth Producers only</i>)
	Terminal Sire Selection or Effective Breeding (lambs)
	Wean More Lambs
	The Nutrition EDGE (<i>Nth Producers only</i>)
	Effective Breeding (beef)
	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)
	MSA Beefing Up Business/Performance
	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, BounceBack from Drought
MBfP = 04	More Beef From Pastures (CD Manual or Forum)
	Cost of production (COP)
	Feed demand calculator
	Rainfall to pasture growth outlook tool
	Tools for time challenged expos
	Stocking rate calculator
COP = 05	Cost of Production Workshops
Beef Up Forums = 06	
Making More from Sheep = 07	MMfS (Separate sheep program – joint MLA/AWI funded). 'It's Ewe Time' (part of the MMfS program)
GRAIN AND GRAZE = 08	
EVERGRAZE = 09	
Bestwool/Bestlamb = 10	(Victoria only)
Bestprac = 11	(pastoral zone only)
Non MLA Events = 12 (Courses conducted by organisations other than MLA where MLA contributed either course content or sponsorship, eg. North West Goat Breeders association Field Day)	Sheep updates - WA
	Merino Forums - SA
	Sheepvention seminars - Vic
	Bestwool / Bestlamb groups - Vic
MLA Publications = 13	Any other MLA publications not elsewhere included
Going Into Goats = 14	The Goat manual and associated introductory field days and workshops
Beef Plan = 15	Not part of Edge courses
futureBeef = 16	FutureBeef - (was Future of Beef in the North) also a DEEDI program which is OK to include. (<i>Nth Producers only</i>)
OTHERS = 99	