# Final report

## Genetics Campaign Market Research


Project code: L.GAP.2001

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# Abstract

Although the link between livestock genetics and profitability is well established, uptake of genetics within the Australian commercial livestock industry is sub-optimal. Research conducted by MLA in 2016 (L.SBP.1501) identified the main barriers to the use of breeding values. A genetics communication campaign was launched in 2019 to address these barriers and improve awareness and uptake of genetics. Quantitative research involving a telephone survey of 301 beef producers and 300 sheep producers was undertaken in 2020 to assess the success of the campaign and inform any future campaign and follow up activities. The research identified that the campaign was successful in informing many producers of the benefits of breeding values, encouraged them to seek information and advice on genetics to help their sire purchase decision and to use, or consider using, breeding values in their operation. Recommendations on how to improve future campaigns were developed in areas such as message content, message delivery and targeted segmentation strategy. The industry will benefit from the research as it demonstrates that a communication campaign to target producers with specific messages to promote on farm practice change can be successful and achieve a return on investment.

# Executive summary

## Background

The primary aim of the research project was to measure the impact of MLA's 2019 genetics marketing campaign to assess if it:

- Meets the needs of beef and sheep producer target audiences; and
- Addresses the barriers for breeding value uptake such as lack of value proposition, lack of education resources around genetics, and language being too complex to understand.

The results of the research will be used to establish whether a communications campaign can be used to successfully generate awareness of messages around genetics and encourage adoption of on farm genetics practices. Results will also be used to guide future campaign strategies including preferred message content and delivery.

## Objectives

The main objectives of the research project were to:

1. Measure the extent to which producers have been exposed to the campaign messages and campaign collateral;
2. Measure the extent to which producers, upon being exposed to the campaign messages, understand what actions to take next and then to what extent they contemplate or actively take those steps; and
3. Inform the future campaign and follow up activities

The objectives were achieved with clear measurements established for awareness of campaign mediums and collateral; recall and recognition of messages, action taken and planned to be taken and recommendations developed for refinement of campaign strategy.

## Methodology

The methodology for this project involved a 17 minute Computer Assisted Telephone Interview (CATI) with 301 beef producers and 300 sheep producers conducted in May and June 2020. Producer contact details were sourced from MLA's member database and supplemented by an external producer database to include non members. The samples were stratified by state and herd and flock size categories based on 2019 data from the Australian Bureau of Statistics (ABS) for representativeness.

## Results/key findings

MLA's genetics campaign has been successful in creating awareness of on farm genetics messages regarding the benefits of breeding values including better progeny, performance, productivity and profitability. Over one third of commercial beef (36%) and sheep producers (39%) could recall information from MLA on breeding values. When prompted 80% of beef and sheep producers recalled at least one element of the campaign. The campaign has also encouraged many producers to take, or plan to take, action such as adopting breeding values and using a range of resources to assist in ram and bull purchasing decisions. Of the producers that were aware of the campaign, 90% plan to take or have taken action as a result of the information provided. The research also identified

how any future campaign can be refined through further explanation of benefits, specific trait, breed and trial information, simple terminology and a focus on short, practical learning.

## Benefits to industry

The benefits to industry of this research are that it has demonstrated the success of the campaign in:

- Helping many producers to understand the benefits of breeding values;
- Providing valuable education material on genetics; and
- Encouraging producers to find out more about breeding values, use breeding values to inform their sire purchasing decisions and think about seeking further learning.

The industry will also benefit as any future genetics campaigns can be further refined to better meet the information needs and learning preferences of producers.

## Future research and recommendations

Seven recommendations have been made from this research:

1. Explain and promote the benefits of breeding values, particularly on the financial side;
2. Develop more targeted, producer specific information to increase relevance;
3. Engage local sources to improve campaign reach;
4. Focus on short and practical learning;
5. Target communication with segmentation strategy;
6. Continue to employ an on farm genetics communication strategy; and
7. Benchmark and track change.

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# 1. Background

## 1.1 Estimated Breeding Values

Genetics is one of the key drivers in productivity and profitability for sheep and beef producers. Estimated Breeding Values (EBV's) and Australian Sheep Breeding Values (ASBVs) allow producers to evaluate an animal's genetic potential for a range of traits that directly impact profitability and productivity such as growth, weight, carcass and eating quality, fertility / reproduction performance, health, welfare and wool quantity and quality.

Despite the demonstrated and proven benefits, some producers have chosen not to utilise breeding values in their enterprises. Benchmark research conducted by MLA in 2016 (L.SBP.1501) identified a number of barriers to adoption including a lack of value proposition, lack of education resources around genetics, and language that is too complex to understand.

To address this, MLA launched a communications campaign in mid 2019 to target the producers seeking information and provide a new suite of resources to drive further uptake of breeding values across the industry.

The campaign included material such as how to videos, case studies, feature articles in MLA's Feedback and Friday Feedback, testimonials, strip ads and booklets. The call to action of all the materials lead producers to a purpose built microsite creating a learning journey with material, specifically targeting non users with jargon free and easy to understand text.

## 1.2 The Need for Research

The launch of a communications campaign is only the first step. Just as critical is a review of campaign effectiveness and then refinement to better influence understanding, behaviour and uptake. Only then can a return on investment from the industry's dollars be measured and improved. A post launch review of MLA's Genetics campaign is therefore critical and MLA commissioned Kynetec in March 2020 to conduct this review.

# 2. Objectives

The objectives of the research were to:

1. Measure the extent to which producers have been exposed to the campaign messages and campaign collateral including Pick the performer videos, producer case studies, how-to videos, shopping for a high-performing sire videos, Feedback and Friday Feedback feature articles
    - how producers heard about the campaign
    - what they remember most about the campaign
    - for those that are not aware of the campaign, identify what channels they seek the majority of their information from.

2. Measure the extent to which producers, upon being exposed to the campaign messages, understand what actions to take next and then to what extent they contemplate or actively take those steps. This includes:
    - measuring the extent to which producers feel confident in using sire buying decisions
    - identifying why follow-up actions were not taken and what they perceive as their main barriers to adopting breeding values
    - Did producers use their new-found knowledge to assist in buying a sire this year? Do they intend to use it when buying a sire next year?
    - Did they:
        - visit the Sheep Genetics/BreedPlan websites
        - use the EBVs in the stud catalogue to make an informed decision
        - ask their stud questions about potential sires
        - did they develop a breeding objective
        - if not, why
        - have they been involved or want to attend BWFW, Breeding EDGE and PGS?

3. Inform the future campaign and follow up activities:
    - Recommendations for how the campaign can be enhanced
    - Understand the preference for producers to participate in 12 month courses or 1 day to 3 day workshops. What is it that they want to learn the most?

# 3. Methodology

## 3.1 Questionnaire

A fully structured questionnaire to address the research objectives and issues was developed in conjunction with MLA. Where relevant, questions from a previous genetics survey (L.SBP.1501) were included to maximise tracking of any demographic, behavioural or attitudinal change. Ample opportunity to explore producers' qualitative responses was provided through a number of open ended questions and 'other specify' options.

## 3.2 Sample design

A sample of 300 beef producers and 300 sheep producers was chosen for this study. This was designed to achieve national results for each species with a 90% confidence level and +/- 4.7% margin of error. Sample sizes were also consistent with the 2016 genetics research study.

The beef and sheep samples were stratified by state and herd and flock size based on the number of producers from the latest data from the Australian Bureau of Statistics (2019). Quotas in each strata were set to ensure that final results were representative of the beef and sheep producer populations.

A further quota of 10% of total sample size was placed on seedstock / stud producers to ensure that this group were not over-represented compared to commercial producers in the results.

The final sample achieved was 301 beef producers and 300 sheep producers.

## 3.3 Databases

MLA provided Kynetec with a random extract of their member data base as a sample frame. To ensure that the views and behaviours of non members of MLA were also captured, an external database of commercial beef and sheep producers was used to supplement the MLA database. A similar database approach was used in the 2016 survey.

## 3.4 Data collection

Data was collected via Computer Assisted Telephone Interview (CATI). A pilot survey with around 20 respondents was first conducted to check interview length, logic and respondent understanding. The questionnaire was subsequently modified to reduce interview length with the final survey averaging 17 minutes.

Fieldwork was conducted from 7 May to 23 June 2020.

## 3.5 Interpretation of results

It should be noted that the results presented in this study are derived from a survey (as opposed to a census when all members of a population are captured). Survey results are used to make inferences about the total population.

As all surveys are subject to errors, a survey result should not be treated as a single value but rather as the midpoint of the likely range that the true population result would lie within. The range around the survey result is the "margin of error".

For example, a survey result of 50% may have a margin of error of plus or minus 5 percentage points ie 45% - 55%. The margin of error depends on the sample size (smaller sample sizes have larger errors) and the actual sample result (a result closer to 50% has a larger percentage error). Due to a high margin of error associated with a small sample, results based on a small sample in the report should be treated with caution. Care should be taken with any results from a sample of less than 30.

# 4. Results

For detailed results, please refer to the L.GAP.2001 Results in appendix 1.

# 5. Key findings

## 5.1 Breeding values

Use of defined breeding objectives and breeding values was widespread

- The majority of commercial producers had a defined breeding objective (Beef 62%, Sheep 79%), with breeding values (including BREEDPLAN, LAMBPLAN and MERINOSELECT) being adopted by nearly half of producers (Beef 48%, Sheep 44%)
- While most of these have been using breeding values for 6 years or longer, more recent adoption is evident with 10% of beef and 23% of sheep producers using them for between 1 – 5 years.

Producers were generally very confident in making sire buying decisions, regardless of their EBV status

- Nearly 80% of commercial producers were either moderately confident or extremely confident in their sire buying decisions (Beef 77%, Sheep 79%)
- While confidence was highest among EBV users (Beef 88%, Sheep 86%), many non EBV users were also moderately or extremely confident (Beef 66%, Sheep 72%). A large gap in confidence among non users and corresponding need for adopting EBVs for this reason was therefore not obvious.

Better understanding of the benefits of EBVs, particularly financial benefits, will be important

- The main top of mind barriers to using breeding values included a small operation, lack of need, not enough information and a reliance on breeders and other selection methods
- An important barrier was also a lack of understanding of benefits. While over 85% of EBV users understood the benefits, this was significantly lower for non users (Beef 35%, Sheep 53%). In addition, 43% on non users of EBVs and 60% of non users of ASBVs indicated they would use breeding values if they could be shown a clear financial benefit
- EBVs being too complicated or sophisticated was not identified as a significant barrier.

## 5.2 Campaign awareness

Early signs of MLA's campaign is clearly evident

- Over one third of all commercial beef (36%) and sheep producers (39%) could recall information from MLA in the last 12 months which promoted using breeding values and other farm genetic practices
- Initial campaign recall was higher among users of breeding values (Beef 46%, Sheep 49%) but importantly non users, who were a key target for the campaign, were also exposed (Beef 28%, Sheep 32%).

There was significant recall of MLA's information in print and to a lesser extent, digital media

- Feedback magazine was largest single source of campaign information cited unprompted by a third of all commercial producers (Beef 30%, Sheep 32%). Rural newspapers also featured prominently for beef producers (19%) but less for sheep (10%)
- Of all digital media sources, MLA's media had the highest unprompted recall. This included Friday Feedback (Beef 15%, Sheep 13%) and MLA's website (Beef 9%, Sheep 7%)
- Other digital sources such as social media, the Genetics Hub, YouTube and webinars were generally only recalled after prompting and were therefore not front of mind.

Feature articles, case studies, and advertisements were the main collateral recalled from the campaign

- Feature articles explaining breeding values achieved the highest level of unprompted recall (22% for both Beef and Sheep), followed by advertisements (10% and 9% respectively) and producer case studies (8% and 6% respectively)
- Awareness of most other collateral was only evident following prompting with the Pocket Guide achieving the highest recall of the remaining collateral.

After all sources and collateral of the campaign were prompted, a total of 83% of commercial beef producers and 81% of commercial sheep producers could recall at least one element indicating strong total awareness of the campaign.

Note that significant time has elapsed since the end of the campaign in October 2019 and the campaign evaluation in May and June 2020. This may explain the disparity between unaided and aided awareness. However, this approach has meant that the research has been able to track actions taken versus only proposed action had the evaluation been conducted immediately after campaign completion.

## 5.3 Message recall and recognition

While many could not recall any messages top of mind, for other producers, recall of breeding values, selection of sires and specific traits was evident

- Around 80% of commercial beef and sheep producers had some awareness of the campaign following prompting for the various sources and media used in the campaign
- A significant proportion of this group however (Beef 52%, Sheep 38%) were unable to recall a specific message (unaided). Some key topics and themes though were recalled by other producers including breeding values (Beef 16%, Sheep 30%), information on selecting, deciding and understanding genetics (13%, 14%) and specific traits (9%, 7%).

The most recognised messages were "Better breeding values, better progeny, better performance" and "Accelerate your productivity with genetics"

- Of producers aware of the campaign, 45% of beef and 67% of sheep producers recognised the "Better" message while 39% of beef and 45% of sheep producers recognised the "Accelerate" message
- Around one third also recognised "Pursuing genetics is profitable"

- Message recognition was higher among sheep producers (78% could recognise at least one message) than beef producers (66%).

## 5.4 Campaign diagnostics

The campaign material was generally well regarded for its clarity and explanation of benefits and encouraged action

- 56% of beef and 63% of sheep producers aware of the campaign agreed that the material was clear and easy to understand. The majority also agreed that the information helped them understand the benefits of breeding values (Beef 52%, Sheep 59%) and provided valuable education material on genetics (Beef 44%, Sheep 57%)
- The campaign's ability to drive action on breeding values was also evident with 42% of beef and 43% of sheep producers encouraged to use breeding values to inform sire purchasing decisions. Non users of breeding values also felt encouraged (Beef 21%, Sheep 23%).

MLA's importance as a source of genetic information has increased over the last 12 months

- Around 80% of all commercial beef and sheep producers consider that the importance they place on MLA as a source of genetic information has been stable over the last 12 months
- However 17% of beef and 14% of sheep producers consider the importance of MLA has actually increased. With only 4% noting a decrease, there has effectively been a 'net gain' in MLA's importance of 13% for beef and 10% for sheep
- The net gain was higher for those aware of the campaign (Beef 16%, Sheep 12%) than those unaware of the campaign (Beef -2%, Sheep 4%) (directionally different, not statistically different).

A continued focus on using simple terms combined with more specific breed, trait and trial information is requested

- Suggestions to improve the campaign were somewhat limited with over half of commercial producers who were aware of the campaign having no suggestions
- While some producers highlighted a need for simple and easy to use terms (Beef 8%, Sheep 7%), more targeted or specific information was also requested which would increase the relevance of information to individual producers. This could include more case studies / trial data (Beef 7%, Sheep 5%), more information on traits (Beef 6%, Sheep 5%) and more region / producer type specific information (Beef 6%, Sheep 7%).

## 5.5 Call to action

Producers have taken definitive action as a result of the campaign

- The top four actions by producers aware of the campaign were speaking with other producers about EBVs (Beef 74%, Sheep 71%), developed a breeding objective (62%, 68%), used EBVs (55%, 49%) and asked their studs questions about existing or potential sires (52%, 54%). Action for these items by users of breeding values was even higher
- Action has been taken by non users of breeding values including speaking with other producers about EBVs (Beef 60%, Sheep 63%), developed a breeding objective (45%, 53%), asked their studs questions about existing or potential sires (30%, 38%) and used EBVs (17%, 18%).

While there is lower uptake of some calls to actions, uptake of these is higher among users of breeding values

Users of breeding values were also responsive to the campaign's other calls to action:

- Visited the BreedPlan website (16% overall, 26% EBV users)
- Visited the Sheep Genetics website (28% overall, 59% ASBV users)
- Contacted Sheep Genetics (10% overall for sheep producers, 19% for ASBV users).

With such a high level of action, there was limited reasons given for inaction

- In total, around 90% of commercial beef and sheep producers who were aware of the campaign have taken or will take some action as a result of the information provided
- Inaction was generally driven by a lack of interest / no perceived benefits, a reliance on other sources such as studs or a lack of time.

## 5.6 Communication

The campaign was strongly aligned with producers' media preferences with the exception of field days

- Producers' top four media sources for genetics information was print and online newspapers and magazines (around half), websites (around a third) and e-newsletters (around 20%) with other digital mediums well down the list. This is broadly in line with sources nominated for campaign
- Field days however were also identified as a significant medium for both beef and sheep producers (around 30%) which most likely meets the more practical, external, face to face learning preference
- asked their studs questions about existing or potential sires (30%, 38%) and used EBVs (17%, 18%).

While producers rely on a diverse range of people and organisations to inform their genetics decisions, local is key

- Visited the BreedPlan website (16% overall, 26% EBV users)

- Local sources such as livestock agents, local producer groups, other producers and family members were widely used by many beef and sheep producers for genetic decision making
- There was also a strong reliance on studs, breed societies, MLA and consultants and advisors
- Sheep producers relied more on MLA (22%) than AWI (12%).

A strong preference exists for ‘short’ and ’practical’ learning

- The majority of producers preferred shorter 1 day workshops for learning about on-farm genetics from MLA (Beef 59%, Sheep 68%). Learning over longer timeframes such as 3 days or 12 months less preferred, most likely reflecting that many producers are time poor
- A practical preference was also evident with on farm trials considered appealing by over 40% of producers
- Online learning courses had significantly less appeal (Beef 24%, Sheep 29%) than 1 day workshops and on farm trials.

# 6. Conclusion and recommendations

## 6.1 Conclusion

The conclusion from the research is that a communication strategy that targets beef and sheep producers with specific messages can lead to on farm practice change. This change can take many forms including producers asking, seeking, learning and adopting. As was evident in this campaign, message delivery should align with producers' preferred mediums and the people and organisations used for the information. A further conclusion is that campaigns should be reviewed post launch to identify not only their success, but also how future campaigns can be enhanced to maximise impacts and outcomes.

## 6.2 Recommendations

### 6.2.1 The benefits of breeding values

*Explain and promote the benefits of breeding values, particularly on the financial side*

Non users of breeding values are often very confident in their sire purchase decisions and do not necessarily see the need, relevance or benefits of breeding values to their operation. Many non users have indicated though that if they could be shown financial benefits in particular, adoption will follow. Future campaigns should therefore focus on (or continue to focus on) explaining the benefits to build the value proposition for producers.

### 6.2.2 Producer specific information

*Develop more targeted, producer specific information to increase relevance*

Producers have expressed a desire for more case studies and trial data, more information on traits and information targeted to specific regions or producer types. Kynetec understands that MLA's overarching campaign strategy includes incorporating traits into its 2020 campaign which is due to launch in August. The revised campaign will therefore directly address some of the needs expressed by producers in this research.

### 6.2.3 Local sources

*Engage local sources to improve campaign reach*

Producers have flagged the importance of local sources of genetic information such as livestock agents, producer groups, other producers, family and advisors / consultants. These sources are often seen as more relevant to "my operation" and are therefore able to have significant influence. Continued efforts by MLA to engage these local sources, in sync with the studs and breed societies, would be valuable.

### 6.2.4 Learning

*Focus on short and practical learning*

One day courses and on farm trials are producers' preferred methods of learning as well as other more practical methods such as field days. Offering more of these short, practical methods of learning could therefore be considered. This is not to say though that other methods such as 3 day

workshop, online learning or 12 month courses can be excluded. These methods definitely fulfill a need and have their place in the mix however it is more a question of getting the right balance.

### 6.2.5 Segmentation strategy

*Target communication with segmentation strategy*

The research has highlighted that some producer segments such as Driving Growth and Living the Life are higher adopters of breeding initiatives and open to learning about genetic improvement. Other segments such as Winding Down are lower adopters. If MLA members are profiled in the CRM and allocated to a segment, it becomes possible to target communication to individual producers in the CRM. In addition, message content and delivery of future genetic campaigns could be designed to meet the unique needs of, and value propositions for, each segment. While segmenting MLA members within the CRM has not yet commenced, the research indicates that it may be advantageous to do so.

### 6.2.6 Measuring change

*Benchmark and track change*

This research has been conducted post campaign launch and has identified valuable insights into the impact of the campaign and how it could be improved. Ideally however, any research would be two stage, involving a pre-launch phase to establish the behavioural, attitudinal and perceptual benchmarks and then a post-launch phase to better measure change and impact. Any future campaign could consider this two phase research approach.

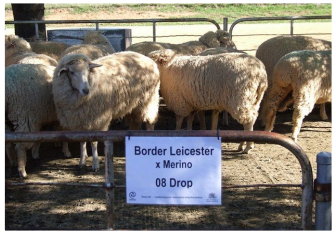
### 6.2.7 Communication strategy

*Continue to employ an on farm genetics communication strategy*

It is clear from the research that the genetics campaign has been a useful and successful strategy. Many producers are aware of the messages and have, or will take, further action, a finding evident across both users and non users of breeding values. Kynetec therefore recommends that MLA continue to employ the current strategy, with refinement, to successfully drive on-farm practice change.

# 7. Appendix

## 7.1 PowerPoint presentation of results




# L.GAP.2001 Genetics Campaign Market Research

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# Outline

# Executive summary

# Strong campaign awareness

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# Good message recognition

While many could not recall any messages top of mind, for other producers, recall of breeding values, selection of sires and specific traits was evident

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# Positive campaign diagnostics

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- While some producers highlighted a need for simple and easy to use terms (Beef 8%, Sheep 7%), more targeted or specific information was also requested which would increase the relevance of information to individual producers. This could include more case studies / trial data (Beef 7%, Sheep 5%), more information on traits (Beef 6%, Sheep 5%) and more region / producer type specific information (Beef 6%, Sheep 7%)

# Calls to action taken

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**With such a high level of action, there was limited reasons given for inaction**

- In total, around 90% of commercial beef and sheep producers who were aware of the campaign have taken or will take some action as a result of the information provided
- Inaction was generally driven by a lack of interest / no perceived benefits, a reliance on other sources such as studs or a lack of time

# Communication alignment and refinement

**The campaign was strongly aligned with producers' media preferences with the exception of field days**

- Producers' top four media sources for genetics information was print and online newspapers and magazines (around half), websites (around a third) and e-newsletters (around 20%) with other digital mediums well down the list. This is broadly in line with sources nominated for campaign
- Field days however were also identified as a significant medium for both beef and sheep producers (around 30%) which most likely meets the more practical, external, face to face learning preference

**While producers rely on a diverse range of people and organisations to inform their genetics decisions, local is key**

- Local sources such as livestock agents, local producer groups, other producers and family members were widely used by many beef and sheep producers for genetic decision making
- There was also a strong reliance on studs, breed societies, MLA and consultants and advisors
- Sheep producers relied more on MLA (22%) than AWI (12%)

**A strong preference exists for 'short' and 'practical' learning**

- The majority of producers preferred shorter 1 day workshops for learning about on-farm genetics from MLA (Beef 59%, Sheep 68%). Learning over longer timeframes such as 3 days or 12 months less preferred, most likely reflecting that many producers are time poor
- A practical preference was also evident with with on farm trials considered appealing by over 40% of producers
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# Breeding value barriers identified

**Use of defined breeding objectives and breeding values was widespread**

- The majority of commercial producers had a defined breeding objective (Beef 62%, Sheep 79%), with breeding values (including BreedPlan, LambPlan and MerinoSelect) being adopted by nearly half of producers (Beef 48%, Sheep 44%)
- While most of these have been using breeding values for 6 years or longer, more recent adoption is evident with 10% of beef and 23% of sheep producers using them for between 1 – 5 years

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- While confidence was highest among EBV users (Beef 88%, Sheep 86%), many non EBV users were also moderately or extremely confident (Beef 66%, Sheep 72%). A large gap in confidence among non users and corresponding need for adopting EBVs for this reason was therefore not obvious

**Better understanding of the benefits of EBVs, particularly financial benefits, will be important**

- The main top of mind barriers to using breeding values included a small operation, lack of need, not enough information and a reliance on breeders and other selection methods
- An important barrier was also a lack of understanding of benefits. While over 85% of EBV users understood the benefits, this was significantly lower for non users (Beef 35%, Sheep 53%). In addition, 43% on non users of EBVs and 60% of non users of ASBVs indicated they would use breeding values if they could be shown a clear financial benefit
- EBVs being too complicated or sophisticated was not identified as a significant barrier

# Recommendations

## Explain and promote the benefits of breeding values, particularly on the financial side

Non users of breeding values are often very confident in their sire purchase decisions and don't necessarily see the need, relevance or benefits of breeding values to their operation. Many non users have indicated though that if they could be shown financial benefits in particular, adoption will follow. Future campaigns should therefore focus on (or continue to focus on) explaining the benefits to build the value proposition for producers

## Develop more targeted, producer specific information to increase relevance

Producers have expressed a desire for more case studies and trial data, more information on traits and information targeted to specific regions or producer types. Kynetec understands that MLA's overarching campaign strategy includes incorporating traits into its 2020 campaign which is due to launch in August. The revised campaign will therefore directly address some of the needs expressed by producers in this research

## Engage local sources to improve campaign reach

Producers have flagged the importance of local sources of genetic information such as livestock agents, producer groups, other producers, family and advisors / consultants. These sources are often seen as more relevant to "my operation" are therefore able to have significant influence. Continued efforts by MLA to engage these local sources, in sync with the studs and breed societies, would be valuable

## Focus on short and practical learning

One day courses and on farm trials are producers' preferred methods of learning as well as other more practical methods such as field days. Offering more of these short, practical methods of learning could therefore be considered. This is not to say though that other methods such as 3 day workshop, online learning or 12 month courses can be excluded. These methods definitely fulfill a need and have their place in the mix however it is more a question of getting the right balance

# Recommendations

## Target communication with segmentation strategy

The research has highlighted that some producer segments such as Driving Growth and Living the Life are higher adoptors of breeding initiatives and open to learning about genetic improvement. Other segments such as Winding Down are lower adoptors. If MLA members are profiled in the CRM and allocated to a segment, it becomes possible to target communication to individual producers in the CRM. In addition, message content and delivery of future genetic campaigns could be designed to meet the unique needs of, and value propositions for, each segment.

While segmenting MLA members within the CRM has not yet commenced, the research indicates that it may be advantageous to do so

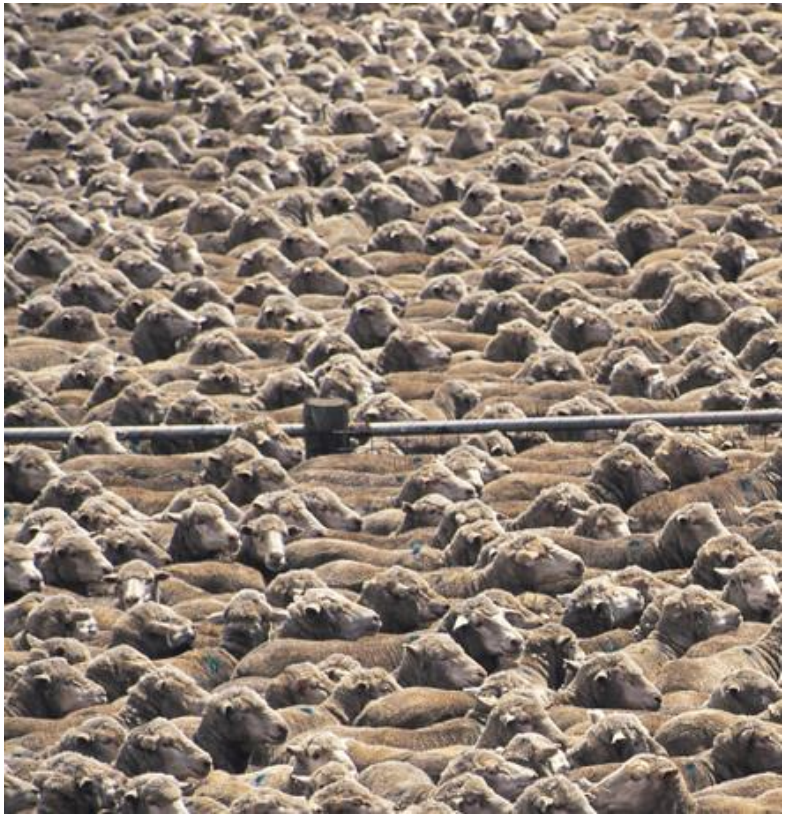
## Continue to employ an on farm genetics communication strategy

It is clear from the research that the genetics campaign has been a useful and successful strategy. Many producers are aware of the messages and have, or will take, further action, a finding evident across both users and non users of breeding values. Kynetec therefore recommends that MLA continue to employ the current strategy, with refinement, to successfully drive on-farm practice change

## Benchmark and track change

This research has been conducted post campaign launch and has identified valuable insights into the impact of the campaign and how it could be improved. Ideally however, any research would be two stage, involving a pre-launch phase to establish the behavioural, attitudinal and perceptual benchmarks and then a post-launch phase to better measure change and impact. Any future campaign could consider this two phase research approach

# Introduction



## Research background and objectives

Research set up and respondent profile

# Background

## Estimated Breeding Values

- ✓ Genetics is one of the key drivers in productivity and profitability for sheep and beef producers. Estimated Breeding Values (EBV's) and Australian Sheep Breeding Values (ASBVs) allow producers to evaluate an animal's genetic potential for a range of traits that directly impact profitability such as growth, weight, carcass and eating quality, fertility / reproduction performance, health and wool quantity and quality
- ✓ Despite the demonstrated and proven benefits, some producers have chosen not to utilise breeding values in their enterprises. Benchmark research conducted by MLA in 2016 (L.SBP.1501) identified a number of barriers to adoption including a lack of value proposition, lack of education resources around genetics, and language that is too complex to understand
- ✓ To address this, MLA launched a communications campaign in mid 2019 to target the producers seeking information and provide a new suite of resources to drive further uptake of breeding values across the industry

## The Need for Research

- ✓ The campaign included material such as how to videos, case studies, feature articles in MLA's Feedback and Friday Feedback, testimonials, strip ads and booklets. The call to action of all the materials lead producers to a purpose built microsite creating a learning journey with material specifically targeting non users with jargon free and easy to understand text
- ✓ The launch of a communications campaign is only the first step. Just as critical is a review of campaign effectiveness and then refinement to better influence understanding, behaviour and uptake. Only then can a return on investment from the industry's dollars be measured and improved. A post launch review of MLA's Genetics campaign is therefore critical and MLA commissioned Kynetec in March 2020 to conduct this review

# Research objectives

CURRENT MEASURES AND IMPLEMENTATION

Measure specific practices including:

- EBV adoption and attitudes
- Indexes
- Artificial insemination
- Embryo transfer
- Confidence in making sire buying decisions

CAMPAIGN AWARENESS, UNDERSTANDING AND ACTION

Establish:

- Awareness of information sources used from the campaign
- Awareness of the campaign, specific elements (eg videos, case studies, websites, etc) and messages
- Subsequent action taken and intentions
- Barriers to action

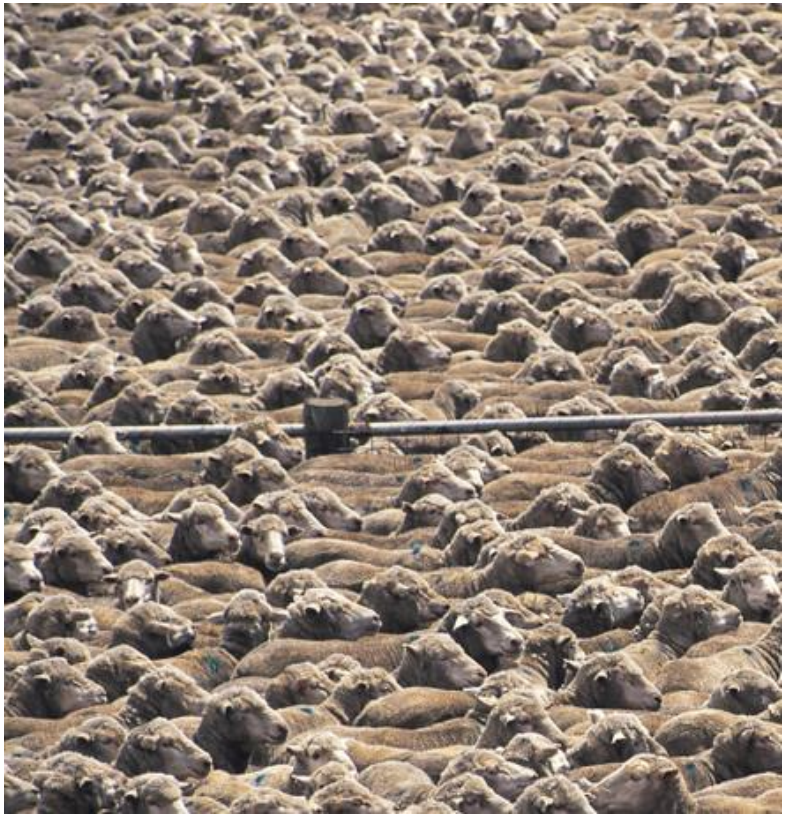
REFINEMENT

Establish:

- Barriers to EBV uptake
- Preferred communication methods and frequency
- Options to enhance campaign

The KEY OBJECTIVE of the project is to

**Measure the awareness and impact of the MLA Genetics campaign to assess if it is overcoming the barriers to adoption by non users such as value proposition and education**



Research background and objectives

Research set up and respondent profile

# Project coverage

Methodology: Computer Aided Telephone Interviews (CATI)

Duration: 17 minutes

Sample : 301 Beef producers (commercial breeding and stud/seedstock) and 300 Sheep producers (commercial breeding and stud/seedstock)

MLA member database supplemented with an external database

Fieldwork was conducted from 7 May – 23 June 2020

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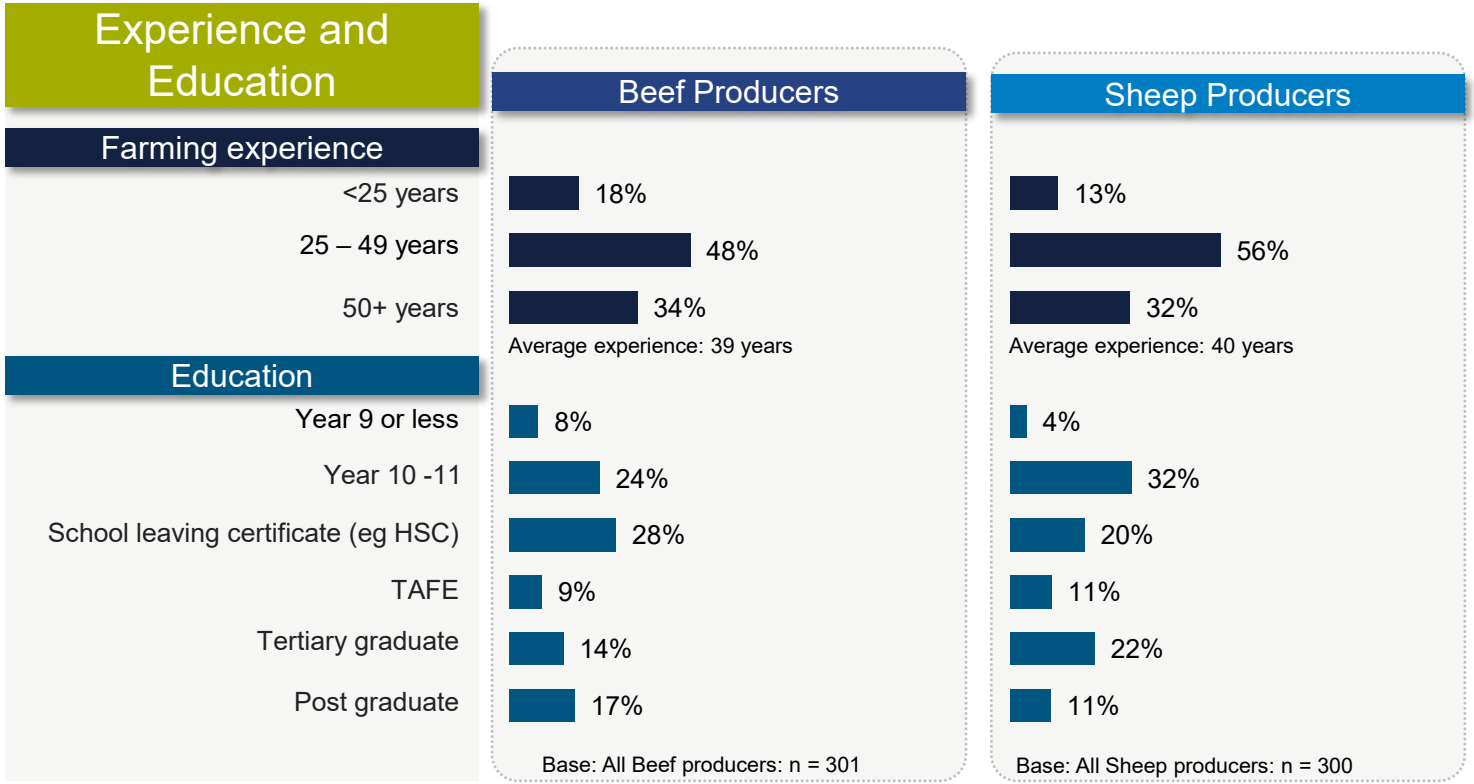
# Sample distribution and respondent profile summary

| Beef Producer Samples | | Region | | | | | |
|---|---|---|---|---|---|---|---|
| (Base) | TOTAL | NSW | VIC | QLD | SA | WA | TAS |
| **Beef Sample Distribution** | **301** | **107** | **62** | **85** | **19** | **19** | **9** |
| Temperate Breeds | 74% | 89% | 98% | 29% | 95% | 89% | 89% |
| Tropical Breeds | 14% | 5% | 2% | 41% | 0% | 5% | 11% |
| Both Breeds | 11% | 7% | 0% | 29% | 5% | 5% | 0% |
| **Age** | | | | | | | |
| < 35 years old | 2% | 2% | 3% | 1% | 0% | 0% | 0% |
| 35 – 54 years old | 24% | 31% | 13% | 21% | 26% | 32% | 11% |
| 55 – 64 years old | 30% | 32% | 29% | 29% | 32% | 16% | 56% |
| 65 + years old | 43% | 35% | 53% | 47% | 42% | 53% | 22% |
| Refused | 1% | 1% | 2% | 1% | 0% | 0% | 11% |
| **Gender** | | | | | | | |
| Male | 79% | 72% | 85% | 84% | 74% | 95% | 67% |
| Female | 21% | 28% | 15% | 16% | 26% | 5% | 33% |

| Sheep Producer Samples | | Region | | | | | |
|---|---|---|---|---|---|---|---|
| (Base) | TOTAL | NSW | VIC | QLD | SA | WA | TAS |
| **Sheep Sample Distribution** | **300** | **112** | **73** | **11** | **51** | **43** | **10** |
| Wool production | 38% | 29% | 37% | 73% | 45% | 47% | 20% |
| Meat Production | 43% | 54% | 41% | 27% | 35% | 30% | 60% |
| Both | 19% | 17% | 22% | 0% | 20% | 23% | 20% |
| **Age** | | | | | | | |
| < 35 years old | 2% | 2% | 1% | 9% | 0% | 2% | 0% |
| 35 – 54 years old | 27% | 29% | 21% | 27% | 25% | 28% | 50% |
| 55 – 64 years old | 33% | 28% | 36% | 0% | 49% | 33% | 30% |
| 65 + years old | 38% | 41% | 42% | 64% | 25% | 37% | 20% |
| Refused | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| **Gender** | | | | | | | |
| Male | 88% | 84% | 89% | 82% | 96% | 91% | 80% |
| Female | 12% | 16% | 11% | 18% | 4% | 9% | 20% |

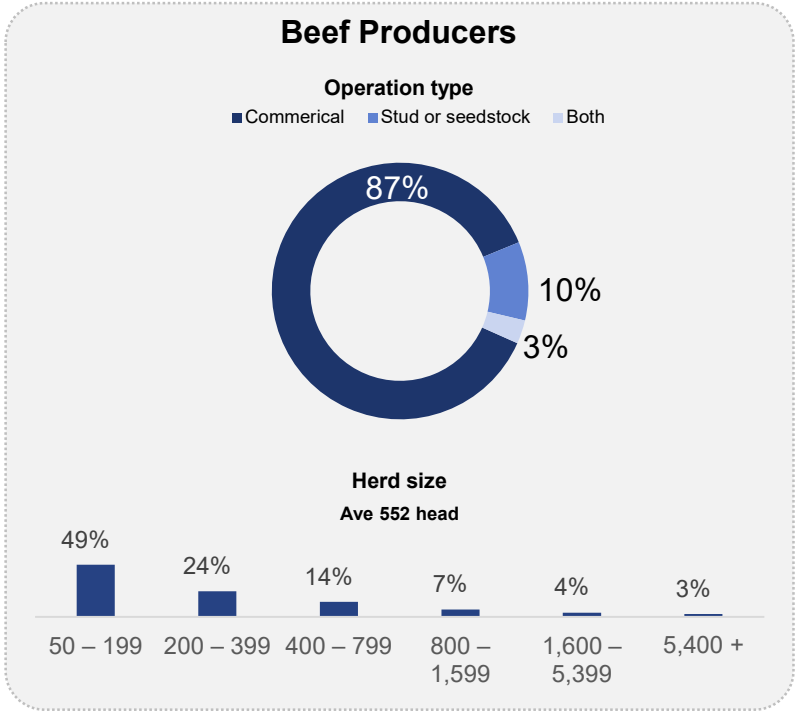
S9: Breeds temperate, tropical or both
S15: In a typical year, what percent of your sheep flock is for…?
Q5.3: Age
Q5.4: Gender

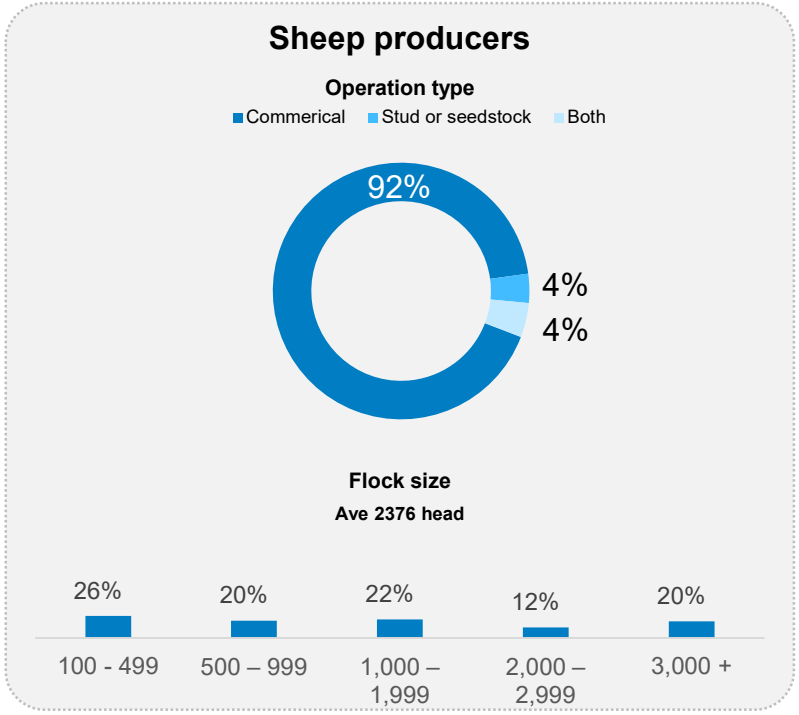
# Farming experience and education




Q5.1: Number of years involved in farming
Q5.2: Education

# Beef and sheep operation type



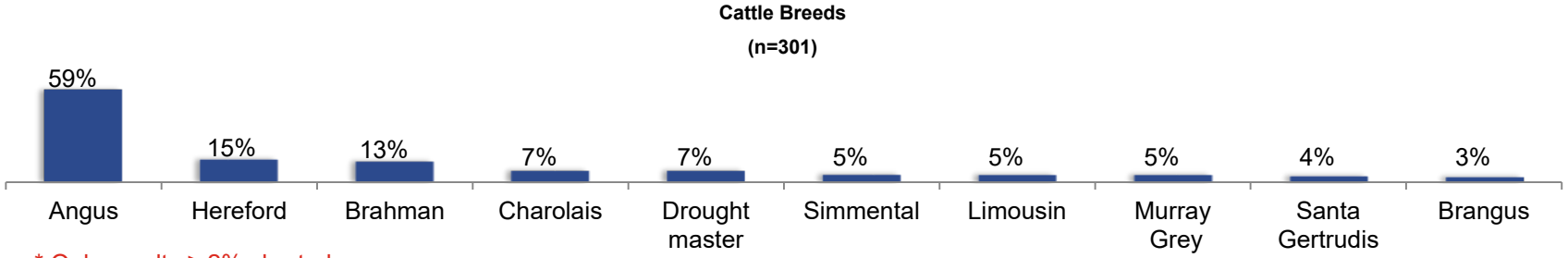




Base: Beef producers: n = 301

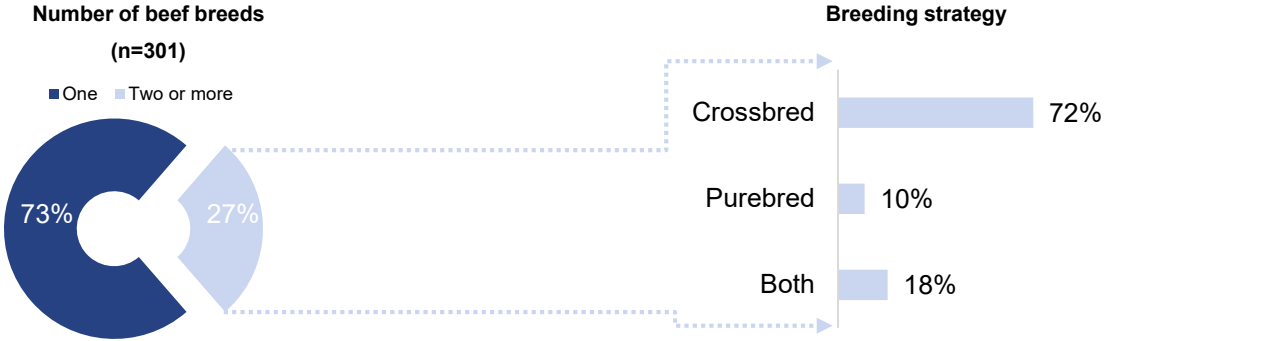
Base: Sheep producers: n = 300

QS6: Which of the following describes the main business purpose of your beef operation?
QS7: On average, over the last three years, how many beef cattle did you have in your herd, including breeding and dry cows and calves?
QS11: Which of the following describes the main business purpose of your sheep operation?
QS12: On average, over the last three years, approximately how many sheep were in your flock, including breeding and dry ewes and lambs?

# Beef breeds and strategy



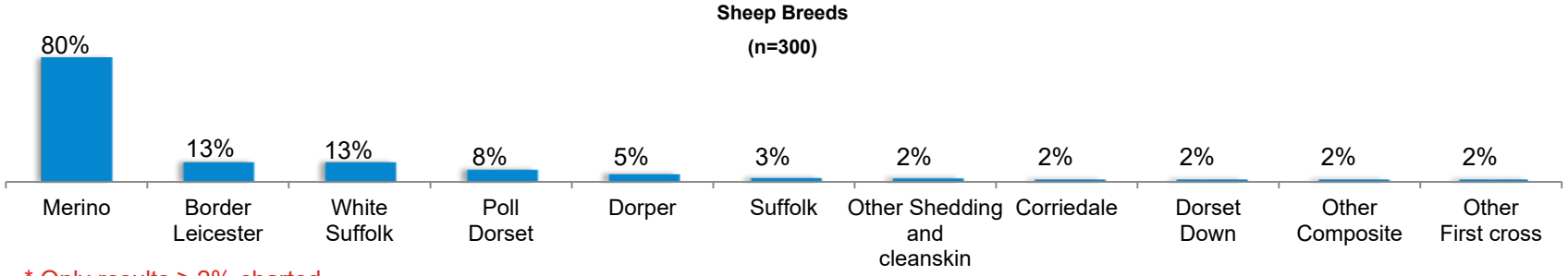

* Only results ≥ 2% charted



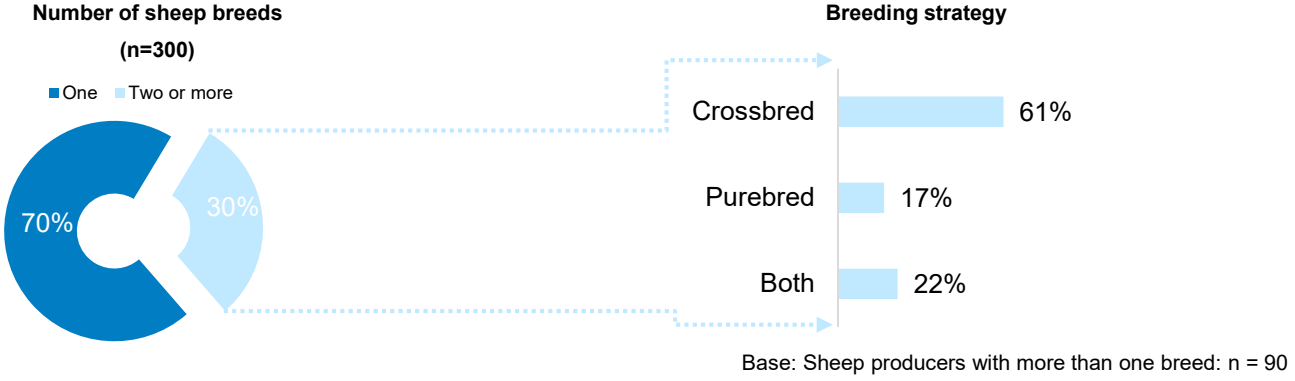

Base: Beef producers with more than one breed: n = 82

QS8: What are your main cattle breeds, the ones that are dominant in your herd
QS10: You've said you have more than one breed on your farm – are these being kept for cross-breeding or are you keeping the breeds separate?

# Sheep breeds and strategy



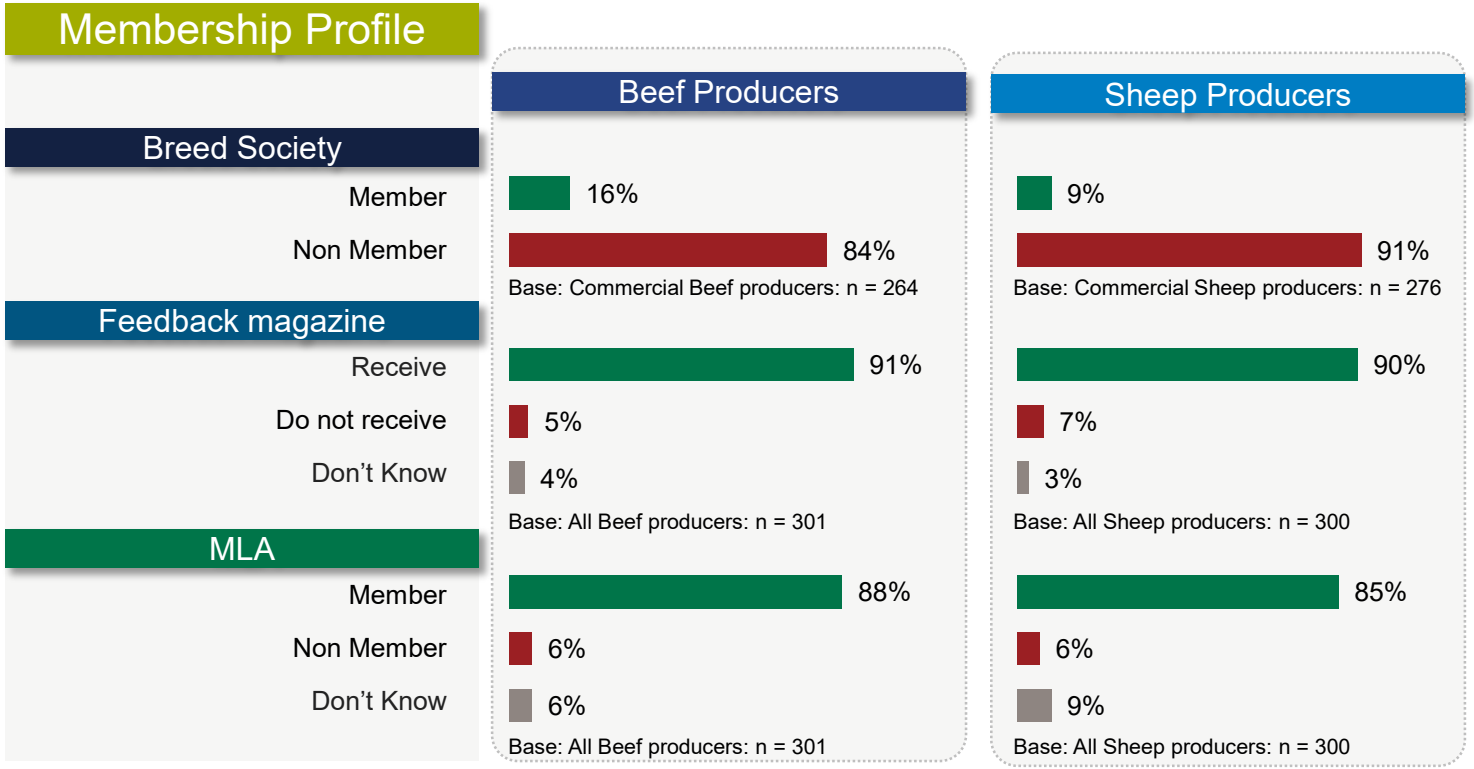

* Only results ≥ 2% charted




Base: Sheep producers with more than one breed: n = 90

QS13: What are your main sheep breeds, the ones that are the most dominant in your flock?
QS14: You've said you have more than one breed on your farm – are these being kept for cross-breeding or are you keeping the breeds separate?

# Membership details




QS16: Are you a member of a breed society?
QS17: Do you receive a copy of MLA's Feedback magazine?
QS18: Are you a member of MLA?

# Detailed report

Genetics Practices

Genetics Campaign Assessment

Communication

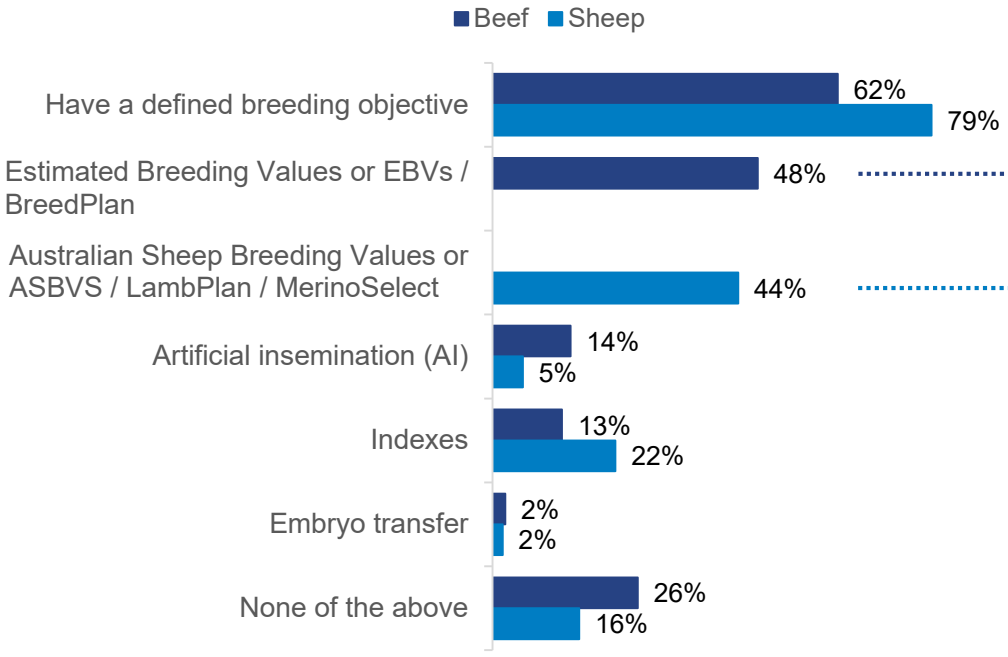
Genetics Practices

Genetics Campaign Assessment

Communication

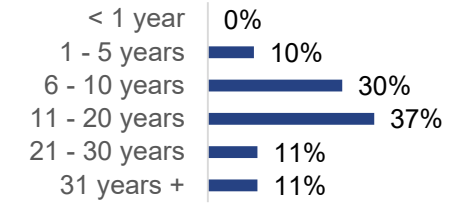
# While the majority of producers had a defined breeding objective, less than half were using breeding values. Indexes were also used however this was by breeding value users

## Use of Genetic improvement programs



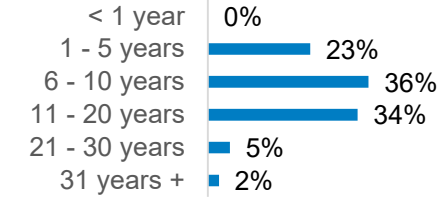

Base: All Beef producers: n = 301
All Sheep producers: n = 300

**Beef producers use of EBV's / BreedPlan**
**Ave 17.4 years**




Base: Beef producers using EBVs / BreedPlan: n = 126

**Sheep producers use of ASBV's / LambPlan / MerinoSelect**
**Ave 11.8 years**



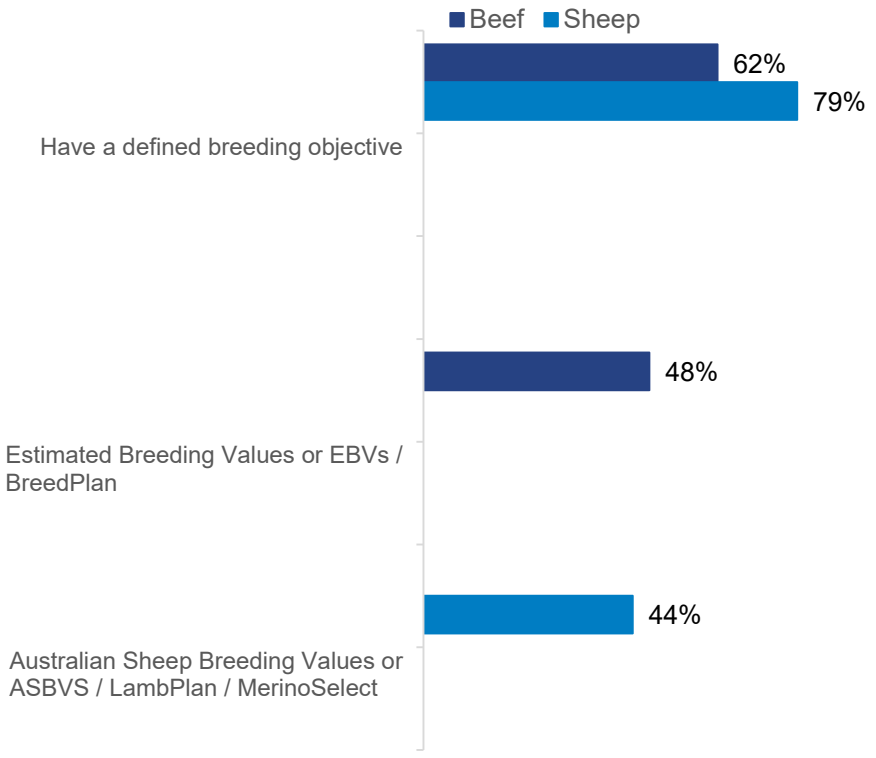

Base: Sheep producers using ASBV's / LambPlan / MerinoSelect: n = 122

Q1.1: Do you use any of the following methods for genetic improvement in your (SAY HERD OR FLOCK)?
Q1.2: How long have you been using …(SAY METHOD)?

Defined breeding objective:
Temperate beef 63%, Tropical beef 51%
EBVs / BreedPlan:
Temperate beef 48%, Tropical beef 37%

# The use of breeding values and objectives varied significantly by producer type with larger, multi-breed, growth oriented and tertiary educated producers often being higher adopters

## Use of Genetic improvement programs




### Defined breeding objective

**Beef:**

- Producers with **two or more breeds** and **800+ cattle** were more likely to have a defined breeding objective at 75% and 80% respectively
- **Breed society** members and **EBV's users** were also more likely to have a defined breeding objective at 79% and 77% respectively
- Temperate: 63%, Tropical: 51%

**Sheep:**

- **ASBV's users** were more likely to have a defined breeding objective 89%

### EBV's

**Beef:**

- **Tertiary** graduates were more likely to use EBV's at 89%
- Producer segmentation highlighted the **Living the Life** and **Driving Growth** segments as more likely to use EBV's at 61% while the **Winding Down** segment were less likely to use at 18%
- Temperate: 48%, Tropical: 37%

### ASBV's / LambPlan / MerinoSelect

**Sheep:**

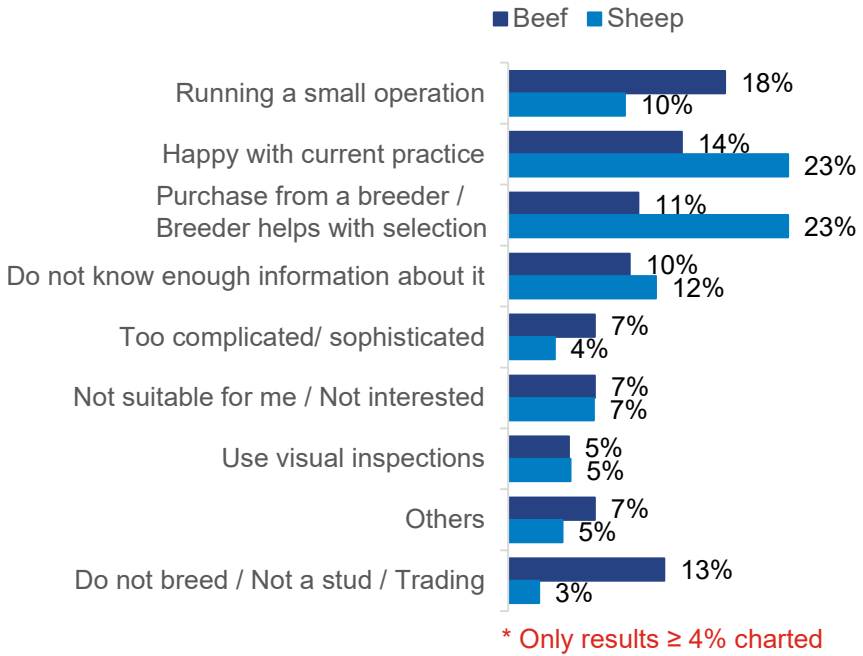
- Producers with **2,000+ sheep** in their flock and producers in the **Driving Growth** segment were more likely to use at 57% and 59% respectively

Q1.1: Do you use any of the following methods for genetic improvement in your (SAY HERD OR FLOCK)?

Base: All Beef producers: n = 301
All Sheep producers: n = 300

# A small operation, lack of need and information and a reliance on breeders and other selection methods were the main barriers to using breeding values

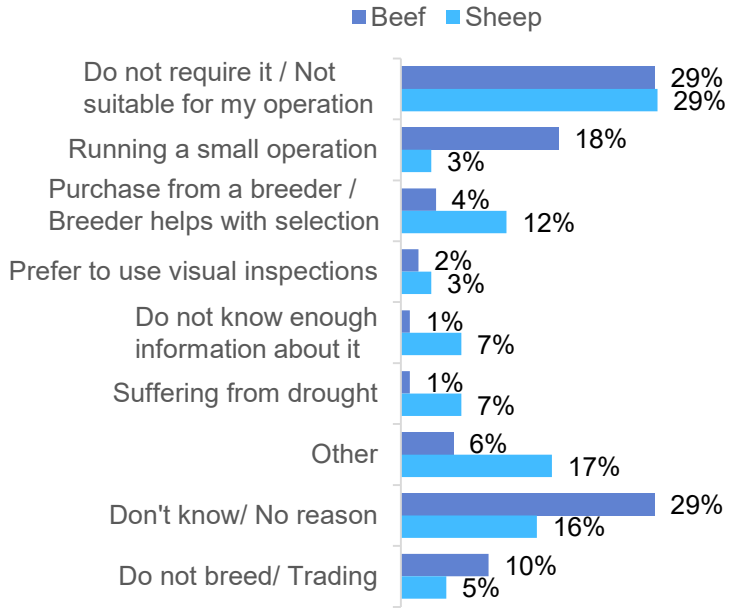
## Reasons for not utilising of breeding values




* Only results ≥ 4% charted

Base: Beef producers not using breeding values: n = 138
Sheep producers not using breeding values: n = 154

## Reasons for not having a defined breeding objective




Base: Beef producers without a defined breeding objective: n = 100
Sheep producers without a defined breeding objective: n = 154

Q1.3: Why don't you use breeding values for genetic improvement in your (SAY HERD OR FLOCK)?
Q1.4: Why don't you have a defined breeding objective for genetic improvement in your (SAY HERD OR FLOCK)?

# Verbatims for not adopting breeding values or objectives

## Reasons for not utilising of breeding values

*"EBVs are better used by studs"*

**Tropical beef producer**

*"We are a smaller operation"*

**Temperate beef producer**

*"Stud owner selects for me"*

**Wool producer**

*"Do our own thing"*

**Sheep meat producer**

Base: Beef producers not using breeding values: n = 138
Sheep producers not using breeding values: n = 154

## Reasons for not having a defined breeding objective

*"Not enough staff and do not have the time or money"*

**Tropical beef producer**

*"This is handled through the owners of the stud not us directly"*

**Temperate beef producer**

*"Have an objective but not defined"*

**Wool producer**

*"Continual droughts make this unfeasible"*

**Sheep meat producer**

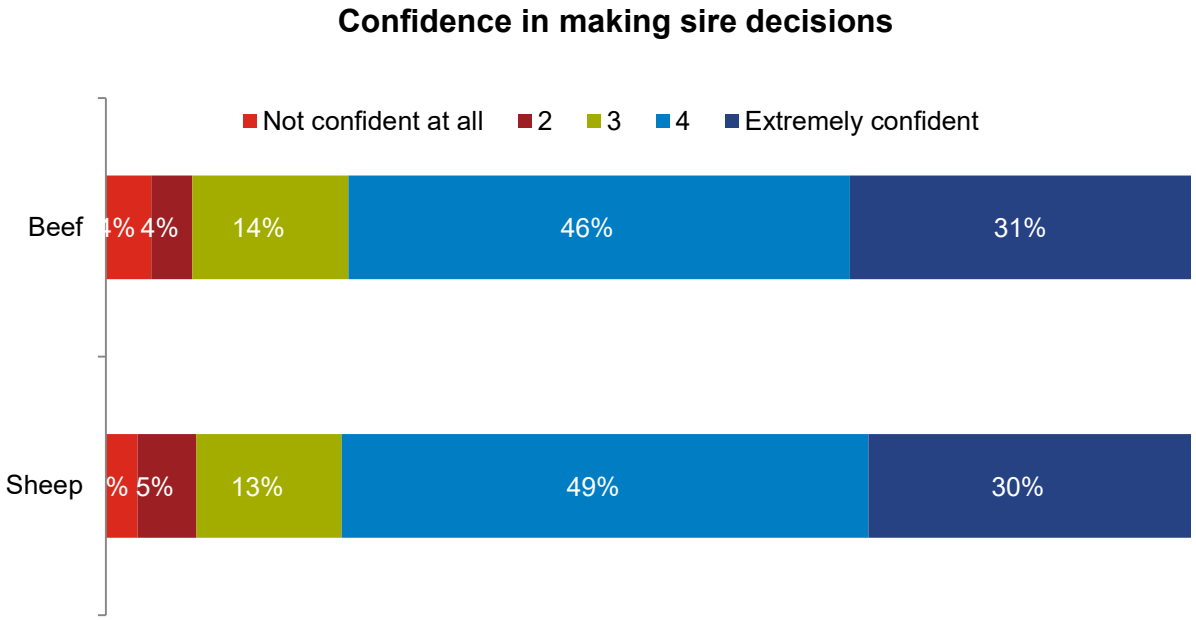
Base: Beef producers without a defined breeding objective: n = 100
Sheep producers without a defined breeding objective: n = 154

Q1.3: Why don't you use breeding values for genetic improvement in your (SAY HERD OR FLOCK)?
Q1.4: Why don't you have a defined breeding objective for genetic improvement in your (SAY HERD OR FLOCK)?



INCORPORATING NEIL CLARK

# Beef and sheep producers were on average very confident in making sire decisions, with confidence slightly higher among breeding value users than non users




| | Mean Score |
|---|---|
| Beef | 4.0 |
| Sheep | 4.0 |

**Confidence**

**Beef:**

- 88% of **EBV's users** were moderately to extremely confident in making sire decisions compared to 66% of non EBV's users
- Temperate: 78%; Tropical: 71%

**Sheep:**

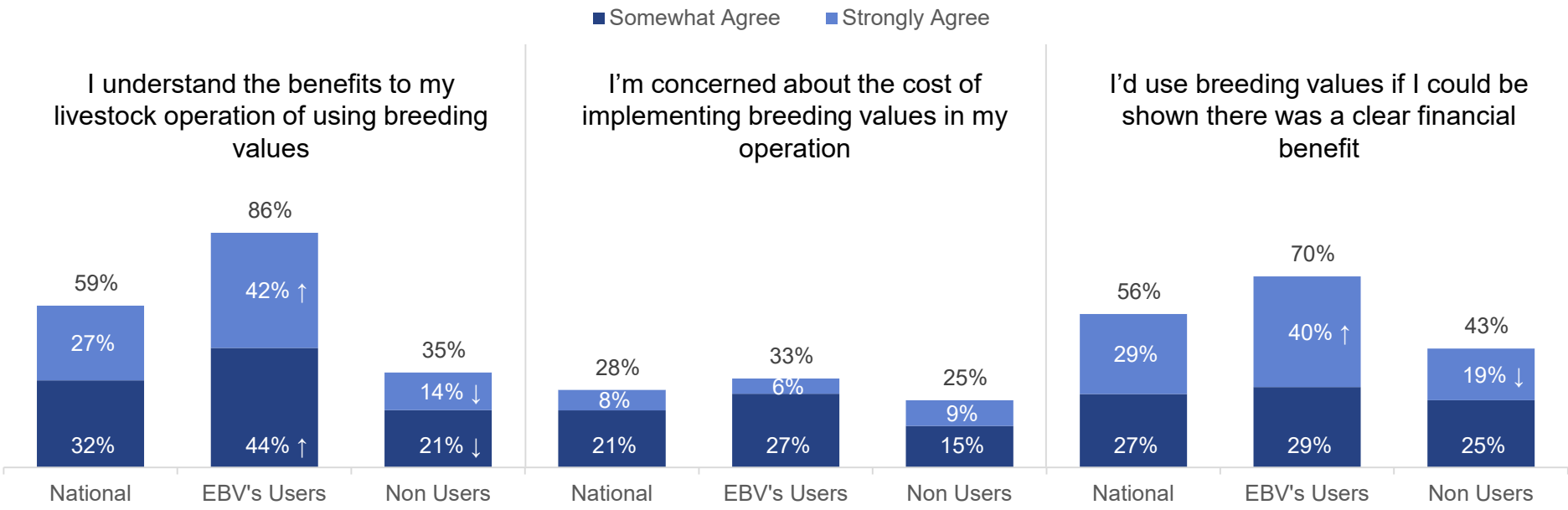
- 86% of **ASBV's users** were moderately to extremely confident in making sire decisions compared to 72% of non ASBV's users

Q1.5: How confident are you in making sire buying decisions? Would you say you were …?

Base: Commercial Beef producers: n = 264
Commercial Sheep producers: n = 276

# Many non users of EBVs lack a clear understanding of the benefits of breeding values. Showing a clear financial benefit would also help adoption however the actual cost of implementing EBVs does not appear to be a major differentiating concern

**Beef producers attitudes towards breeding values**




Total agreement was higher among Driving Growth at 78% and lower among Holding Steady at 41%

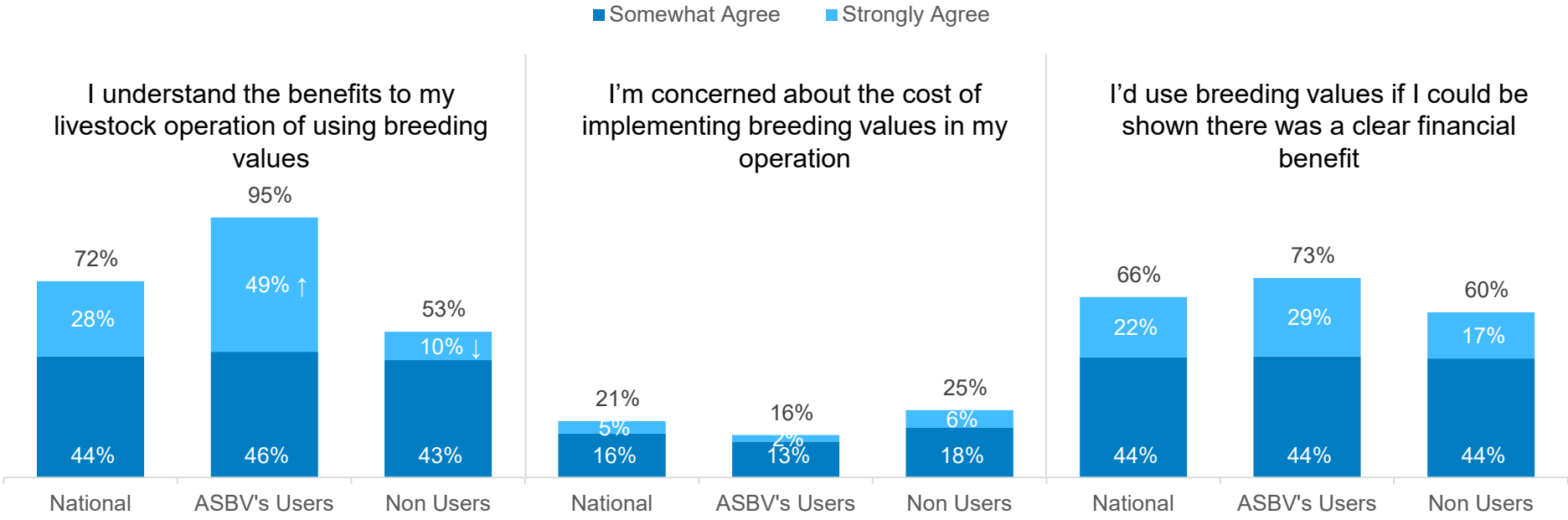
Total agreement was higher among Driving Growth at 71% and lower among Holding Steady at 42%

Q4: Using a scale of 1 to 5 where 1 is Strongly Disagree, 2 is Somewhat Disagree, 3 is Neither Agree nor Disagree, 4 is Somewhat Agree and 5 is Strongly Agree, please indicate how strongly you agree or disagree with each of the following statements

Base: All Beef producers: n = 301

# Non users of ASBVs, like their beef counterparts, have flagged a lack of understanding of the benefits of breeding values and a desire for a demonstrable financial benefit to encourage adoption

**Sheep producers attitudes towards breeding values**




Total agreement was higher among Driving Growth at 78% and lower among Holding Steady at 55% and Winding Down at 58%

Total agreement was lower among Winding Down at 42%

Q4: Using a scale of 1 to 5 where 1 is Strongly Disagree, 2 is Somewhat Disagree, 3 is Neither Agree nor Disagree, 4 is Somewhat Agree and 5 is Strongly Agree, please indicate how strongly you agree or disagree with each of the following statements

Base: All Sheep producers: n = 300

Genetics Practices

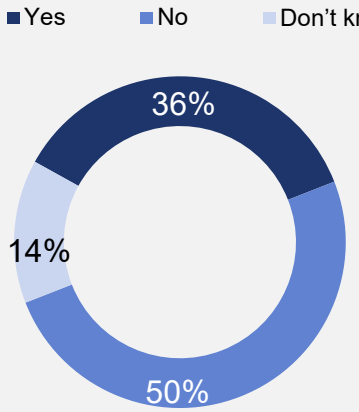
Genetics Campaign Assessment

Communication

# The campaign can claim some initial success with over a third of commercial producers recalling information from MLA promoting breeding values and genetic practices

**Initial recollection of MLA's genetics information**

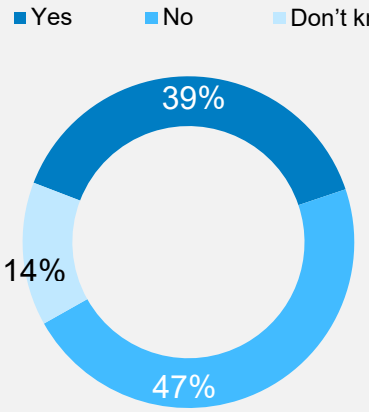
**Beef Producers**




Yes: Temperate beef 35%, Tropical beef 41%

Base: Commercial Beef producers: n = 264

**Sheep producers**

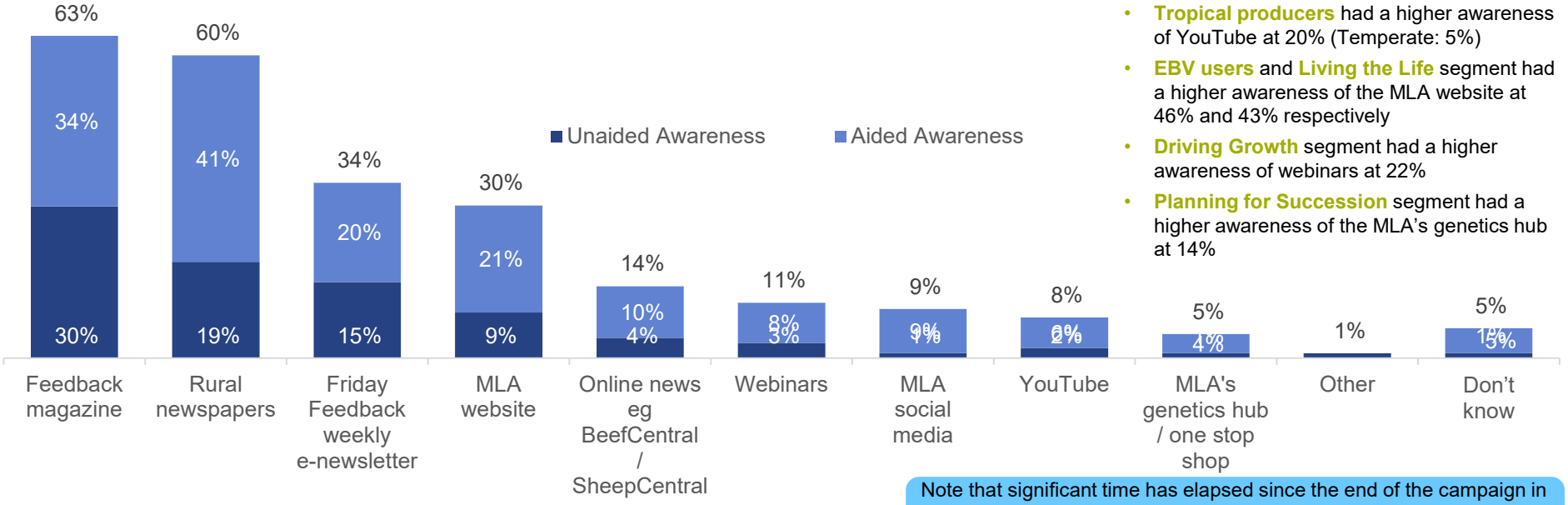



Base: Commercial Sheep producers: n = 276

Q2.1: In the last 12 months, do you recall any information from MLA which promoted using breeding values and other farm genetic practices?

# The highest awareness of MLA's information among beef producers was from traditional print sources such as Feedback magazine and rural newspapers although digital mediums also featured

## Beef producers source of MLA genetic information




### Differences by group

**Total awareness:**

- **Tropical producers** had a higher awareness of YouTube at 20% (Temperate: 5%)
- **EBV users** and **Living the Life** segment had a higher awareness of the MLA website at 46% and 43% respectively
- **Driving Growth** segment had a higher awareness of webinars at 22%
- **Planning for Succession** segment had a higher awareness of the MLA's genetics hub at 14%

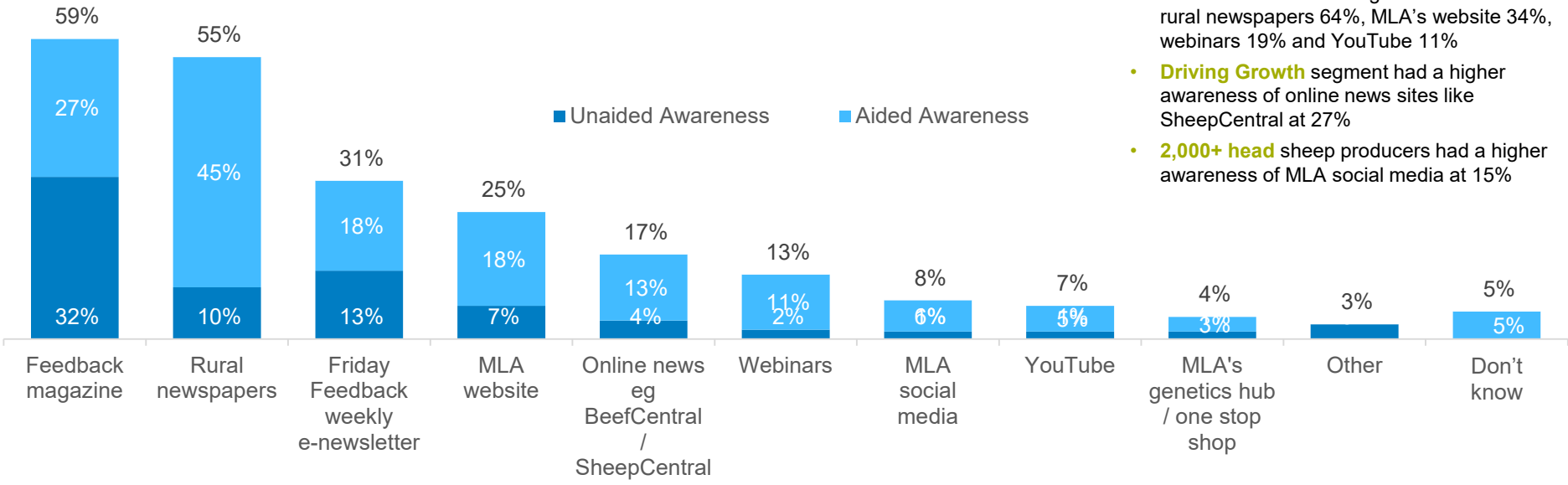
Note that significant time has elapsed since the end of the campaign in October 2019 and the campaign evaluation in May and June 2020. This may explain the disparity between unaided and aided awareness

Q2.2: Where did you see or hear this information regarding breeding values and on-farm genetic practices?
Q2.3: Have you seen or heard anything regarding on-farm genetic practices from the following sources?

Base: Commercial Beef producers: n = 264

# Feedback magazine and rural newspapers were also the most prominently mentioned sources of genetics information by sheep producers

## Sheep producers source of MLA genetic information




### Differences by group

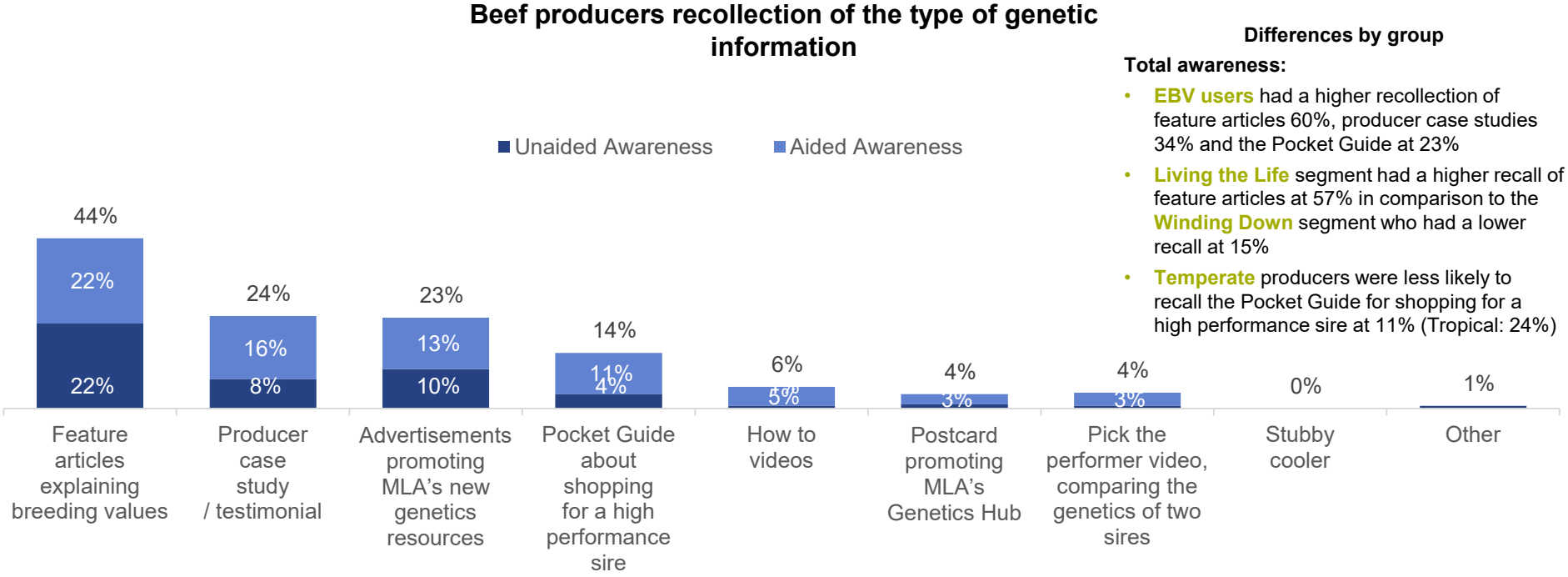
**Total awareness:**

- **ASBV's users** had a higher awareness of rural newspapers 64%, MLA's website 34%, webinars 19% and YouTube 11%
- **Driving Growth** segment had a higher awareness of online news sites like SheepCentral at 27%
- **2,000+ head** sheep producers had a higher awareness of MLA social media at 15%

Q2.2: Where did you see or hear this information regarding breeding values and on-farm genetic practices?
Q2.3: Have you seen or heard anything regarding on-farm genetic practices from the following sources?

Base: Commercial Sheep producers: n = 276

# Beef producers recalled feature articles, case studies and advertisements as the most prevalent type of MLA's genetics information




**Differences by group**

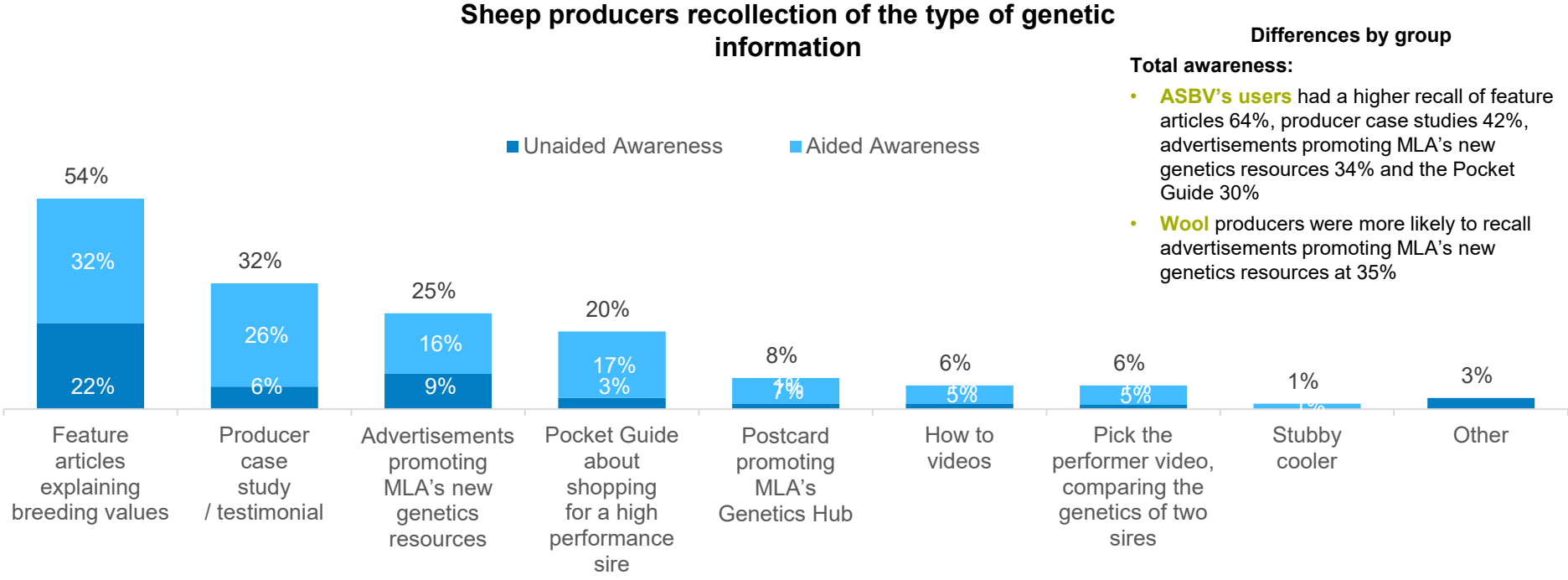
**Total awareness:**

- **EBV users** had a higher recollection of feature articles 60%, producer case studies 34% and the Pocket Guide at 23%
- **Living the Life** segment had a higher recall of feature articles at 57% in comparison to the **Winding Down** segment who had a lower recall at 15%
- **Temperate** producers were less likely to recall the Pocket Guide for shopping for a high performance sire at 11% (Tropical: 24%)

Q2.4: **What** specifically did you see, hear or read about from MLA about using breeding values and other on-farm genetic practices?
Q2.5: Have you seen, heard or read anything regarding on-farm genetic practices in the following formats?

Base: Commercial Beef producers: n = 264

# Sheep producers had a stronger recollection of MLA's feature articles, producer case studies and advertisements than other types of information




**Differences by group**

**Total awareness:**

- **ASBV's users** had a higher recall of feature articles 64%, producer case studies 42%, advertisements promoting MLA's new genetics resources 34% and the Pocket Guide 30%
- **Wool** producers were more likely to recall advertisements promoting MLA's new genetics resources at 35%

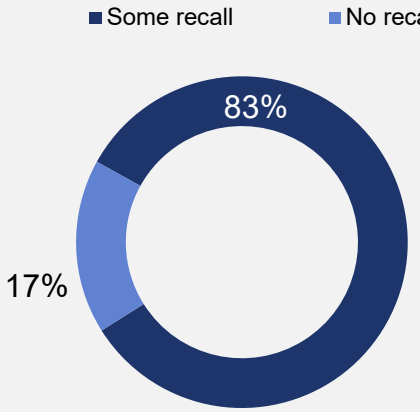
Q2.4: **What** specifically did you see, hear or read about from MLA about using breeding values and other on-farm genetic practices?
Q2.5: Have you seen, heard or read anything regarding on-farm genetic practices in the following formats?

Base: Commercial Sheep producers: n = 276

# Total recollection of the campaign was strong with 8 of 10 commercial beef and sheep producers recalling at least one source or collateral item from the campaign following prompting

**Total recollection of MLA's genetics information**

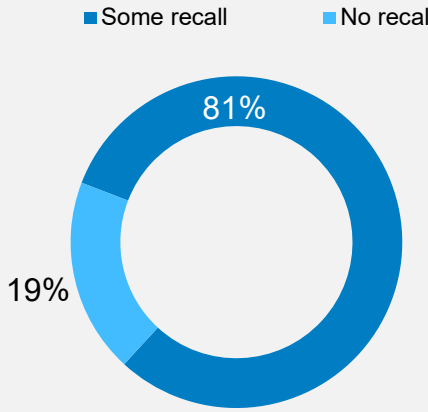
**Beef Producers**




Yes: Temperate beef 85%, Tropical beef 73%

Base: Commercial Beef producers: n = 264

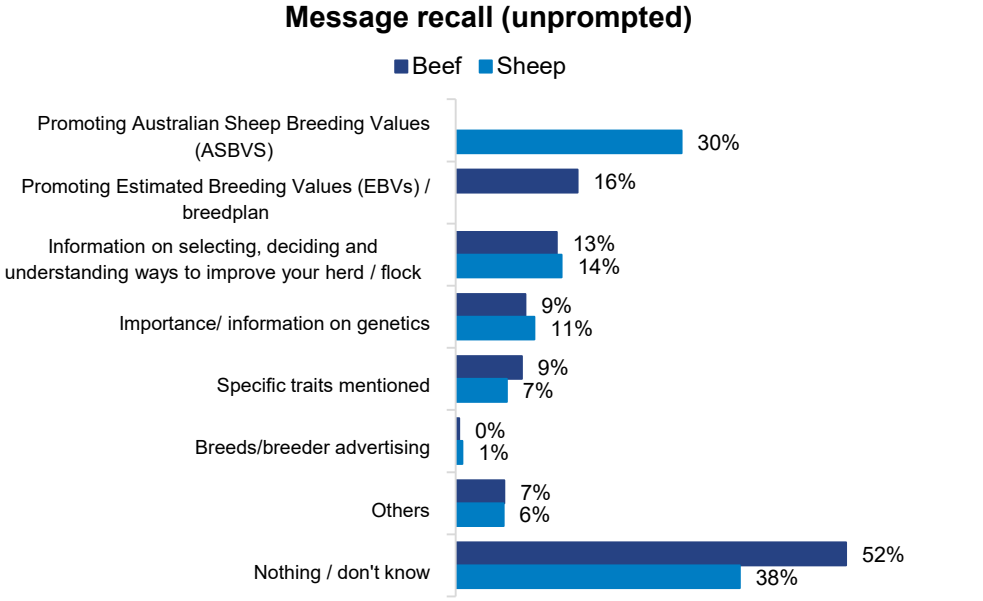
**Sheep producers**




Base: Commercial Sheep producers: n = 276

INCORPORATING

# Message recall from MLA's information was varied but general themes included breeding values, the selection of sires and specific traits such as weight gain and growth rates




Base: Beef producers with some campaign awareness: n = 215
Sheep producers with some campaign awareness: n = 219

*"Kept track of 'them' gives you the best growth rates and best breeds of cattle"*

**Tropical beef producer**

*"Sire values, good angus, low birth rates and good weight gain"*

**Temperate beef producer**

*"Picking sires to fix deficiency in flock eg microns, weaning weights ,eye muscle"*

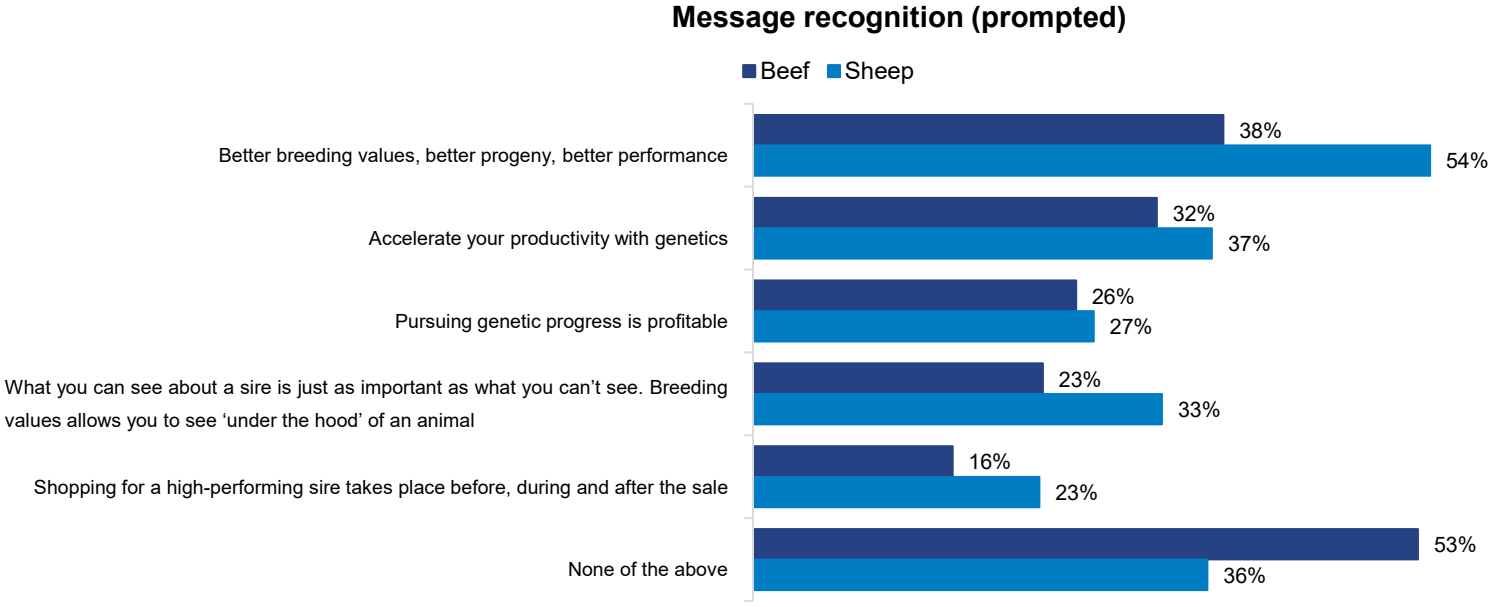
**Wool producer**

*"Standard practice about combining EBVs and breeding data and balance the fiscal attributes of the animal"*

**Sheep meat producer**

Q2.9: Based on the material that you saw, heard or read, what was the information trying to tell you?

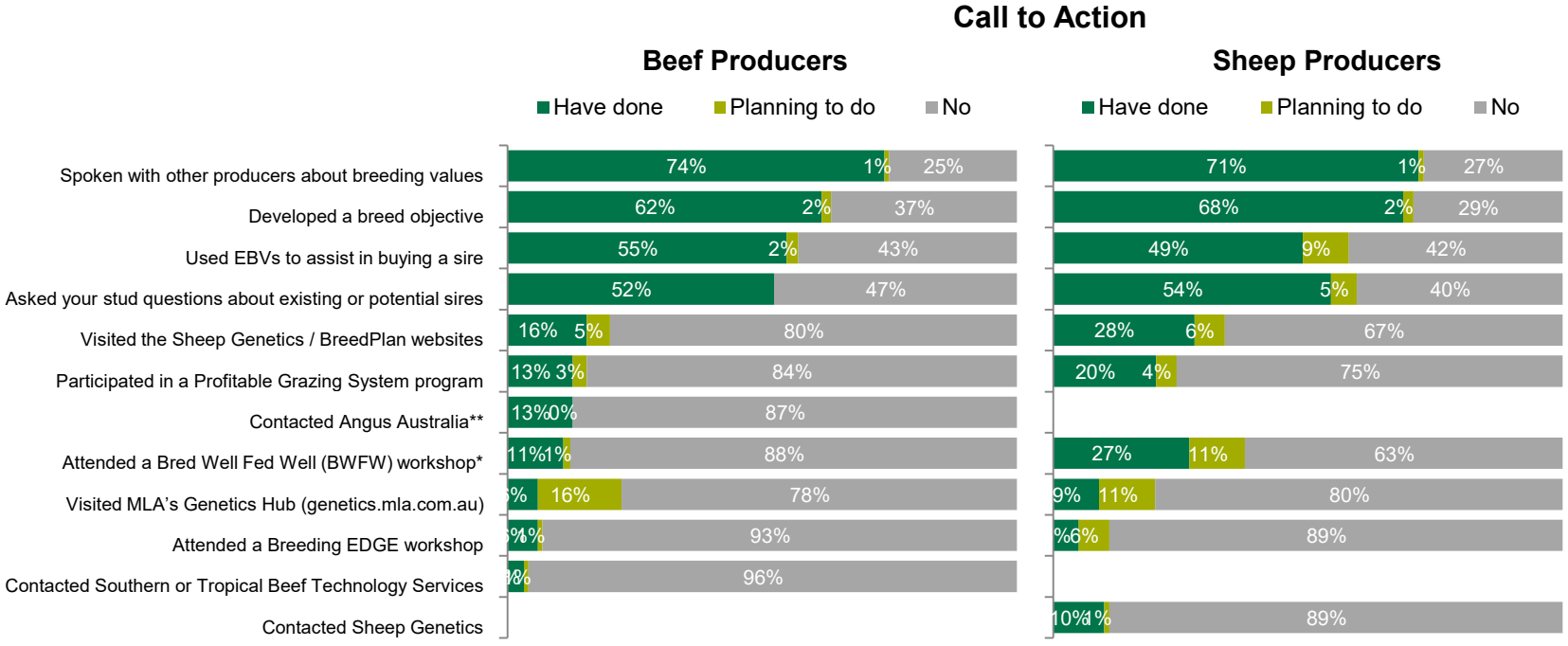
# “Better breeding values, better progeny, better performance” was the most recognised message from the campaign followed by “Accelerate your productivity with genetics”




Q2.10: Do you recall any of the following messages from the information?

Base: Commercial Beef producers: n = 264
Commercial Sheep producers: n = 276

# The success of the campaign is evident by the widespread action taken by many producers including engaging with studs and other producers and developing breeding objectives and using breeding values




Overall, 89% of beef producers and 91% of sheep producers aware of the campaign have or will take some action as a result of the information from MLA

The higher proportion of 'have done' versus 'planning to do' could reflect that the campaign started 12 months ago which has allowed sufficient time for producers to take action

Base: Beef producers with some campaign awareness: n = 219 Sheep producers with some campaign awareness: n = 224

** Temperate beef 16%, Tropical beef 7%

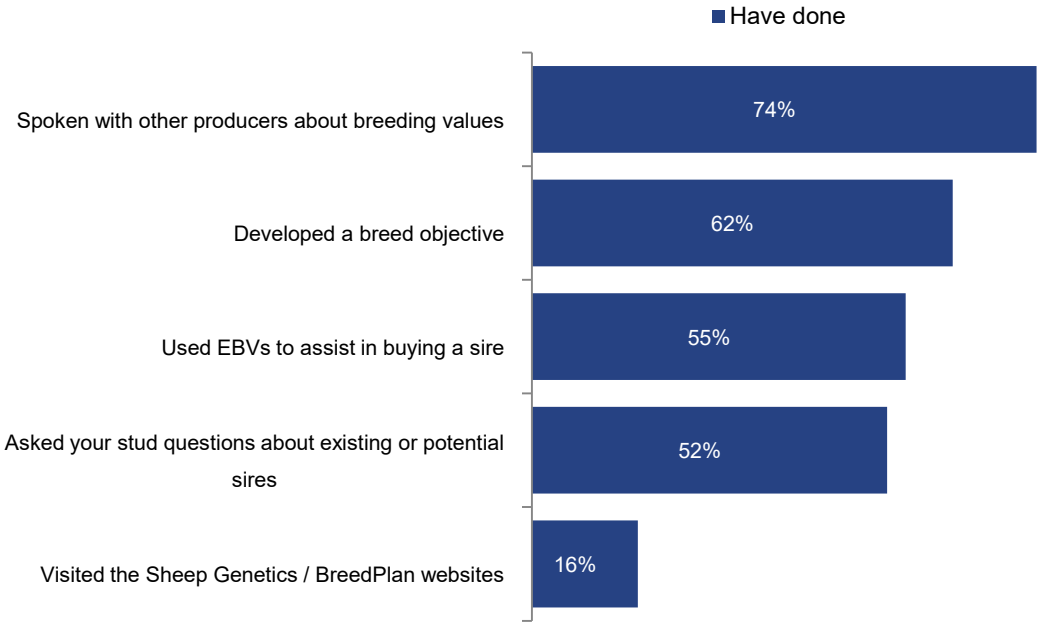
* BWFW data should be treated with caution as the attendance numbers attributed to the campaign are significantly higher than the workshops run over the period. It is possible that some respondents are referring to workshops before the campaign

Q2.11: As a result of the information from MLA, have you done, or are you planning to do, any of the following?

# Over half of all beef producers have either spoken or asked about breeding values, developed a breeding objective or used breeding values when buying a sire

## Call to Action

### Beef Producers




Base: Beef producers with some campaign awareness: n = 219

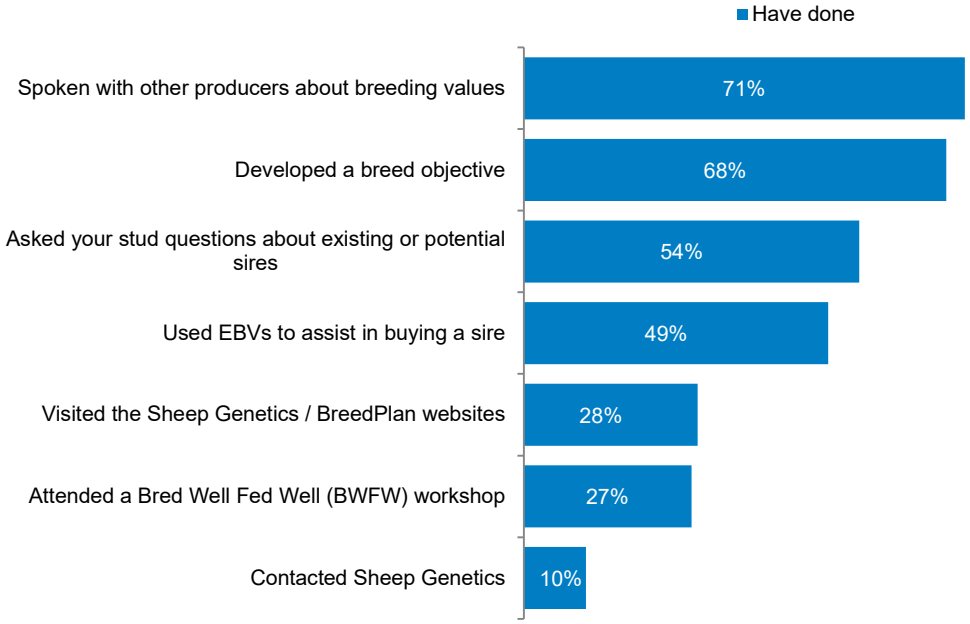
Q2.11: As a result of the information from MLA, have you done, or are you planning to do, any of the following?

### Differences by group

- **EBV users** were more likely to have:
  - Spoken to other producers about EBV's 86%
  - Developed a breeding objective 76%
  - Asked their stud questions about sires 71%
  - Visited the BreedPlan website 26%
- **Non EBV users** have also taken action but to a lesser extent:
  - Spoken to other producers about EBV's 60%
  - Developed a breeding objective 45%
  - Asked their stud question about sires 30%
  - Used EBV's to assist in buying a sire 17%
- **Segmentation:**
  - **Living the Life** producers were more likely to have used EBV's to assist in buying a sire while in contrast the **Holding Steady** and **Winding Down** segments were less likely to use at 36% and 25% respectively
  - **Winding Down** were less likely to ask their stud questions about sires at 25%

# Many sheep producers have developed a breeding objective and either asked or used breeding values with respect to sires

## Sheep Producers




Sheep producers with some campaign awareness: n = 224

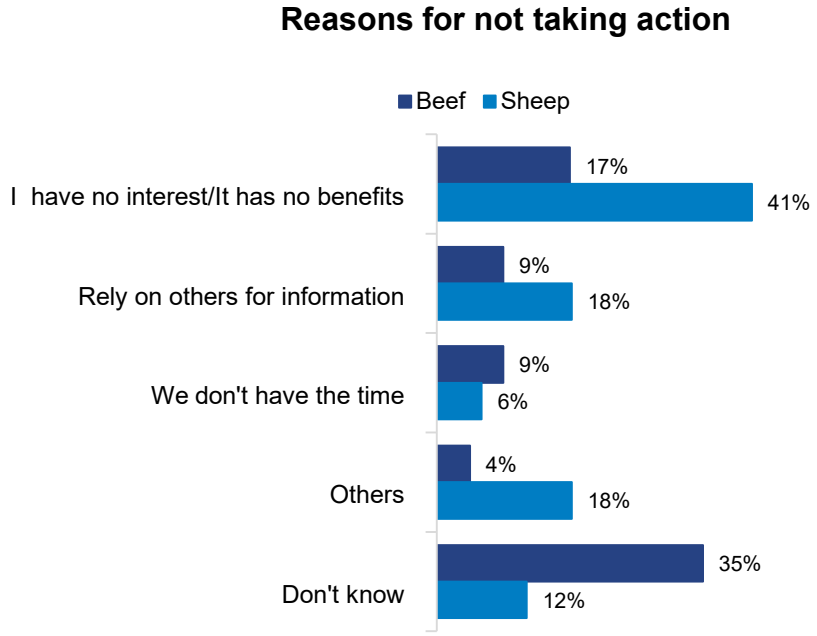
Q2.11: As a result of the information from MLA, have you done, or are you planning to do, any of the following?

## Call to Action

**Differences by group**

- **ASBV users** were more likely to have:
  - Developed a breeding objective 84%
  - Asked their stud question about sires 72%
  - Used EBV's to assist in buying a sire 82%
  - Visited the Sheep Genetics website 59%
  - Attended a Bred Well Fed Well workshop 42%
  - Contacted Sheep Genetics 19%
- **Non ASBV users** have taken action but to a smaller degree:
  - Spoken to other producers about EBV's 63%
  - Developed a breeding objective 53%
  - Asked their stud questions about sires 38%
  - Used EBV's to assist in buying a sire 18%
  - Attended a Bred Well Fed Well workshop 13%
- **Segmentation:**
  - **Driving Growth** producers 41% were more likely to have attended a Bred Well Fed Well workshop in contrast to the **Winding Down** segment at 6%

# There was very few producers who took no action from the campaign. A lack of interest and benefits and use of alternative sources were the main causes of inaction




*"Haven't actually needed any information as yet as the brother in law has got it"*

**Tropical beef producer**

*"I know what I'm doing"*

**Temperate beef producer**

*"No benefit to myself"*

**Wool producer**

*"I don't feel like it's produced for people like me, it's done by city people"*

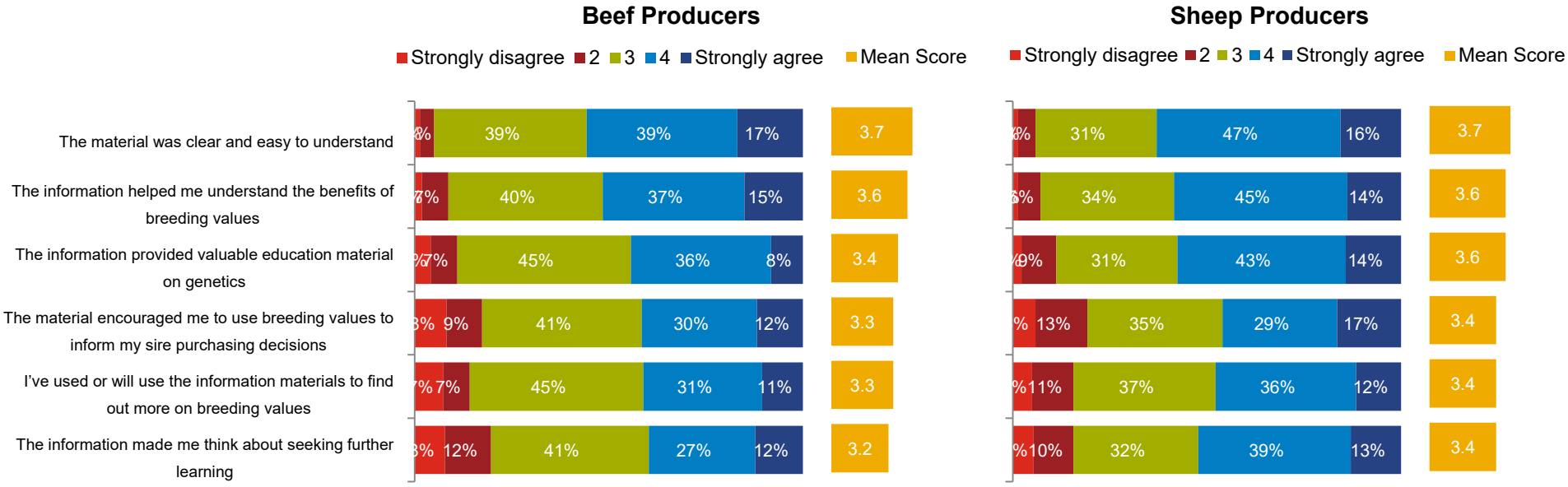
**Sheep meat producer**

Base: Beef producers not utilising or planning to utilised tools and programs mentioned at Q2.11: n = 23
Sheep producers not utilising or planning to utilised tools and programs mentioned at Q2.11: n = 17

Q2.12: Why haven't you taken and don't plan to take any action as a result of the MLA information on genetics?

# The majority of producers agreed that the campaign material was easy to understand and explained the benefits of breeding values. The material was also a catalyst for action for many producers

## Opinions regarding breeding values



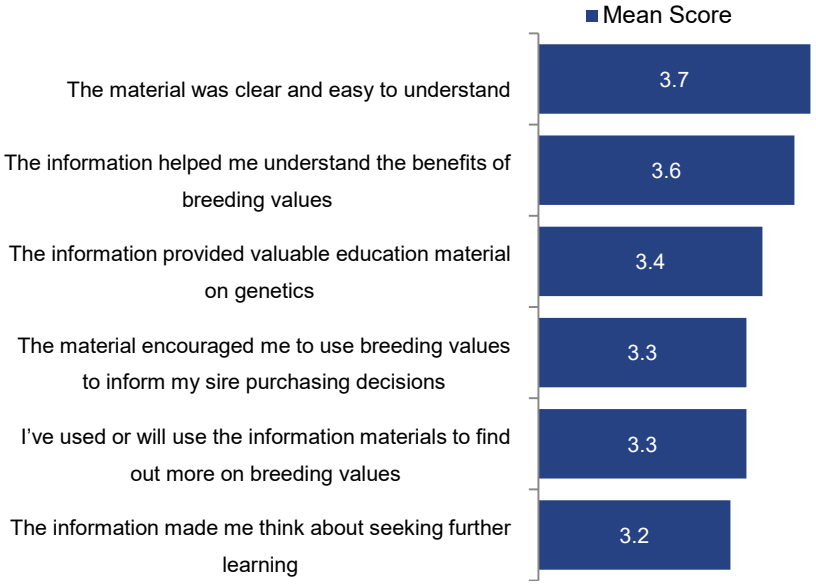

Base: Beef producers with some campaign awareness: n = 219
Sheep producers with some campaign awareness: n = 224

Q2.13: Based on what you've seen, heard or read from the MLA information about using breeding values, how would you rate the information against the following statements on a scale of 1 to 5 where 1 is Strongly disagree, 2 is Disagree, 3 is Neither Agree nor Disagree, 4 is Agree and 5 is Strongly agree?

# Beef producers using EBV's rated the performance of the campaign higher than non EBV users however a positive impact on non users was still clearly evident particularly for ease, clarity and understanding of benefits

## Opinions regarding breeding values

### Beef Producers




### Differences by group

**EBV's users** more likely to agree:

- That the information presented was clear and easy to understand 3.8 (Non EBV users 3.5)
- That the information presented helped them better understand the benefits od breeding values 3.8 (Non EBV users 3.3)
- That the information provided valuable education material on genetics 3.6 (Non EBV users 3.1)
- That the material encouraged them to use breeding values for purchasing decisions 3.7 (Non EBV users 2.8)
- That will likely use or will use the material seek out more information on breeding values 3.6 (Non EBV users 2.9)
- That they will likely seek further learning about breeding values 3.5 (Non EBV users 2.9)

**Segmentation:**

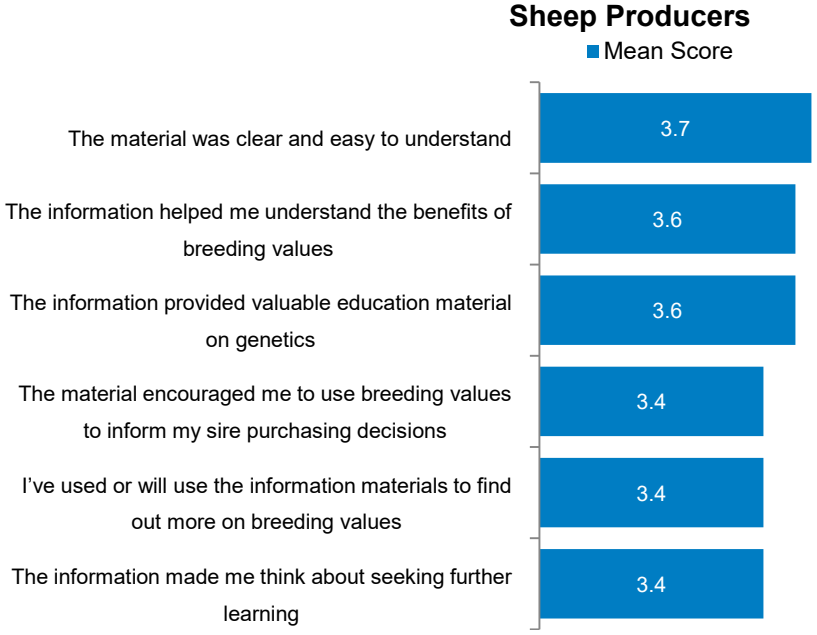
- **Living the Life** producers were more likely to agree that the material encouraged them to use breeding values for purchasing decisions at 3.6 in contrast to **Winding Down** segment where producers were less likely to do so at 2.5

Q2.13: Based on what you've seen, heard or read from the MLA information about using breeding values, how would you rate the information against the following statements on a scale of 1 to 5 where 1 is Strongly disagree, 2 is Disagree, 3 is Neither Agree nor Disagree, 4 is Agree and 5 is Strongly agree?

Base: Beef producers with some campaign awareness: n = 219

# Sheep producers using EBV's scored the campaign higher than non EBV users however non users were still quite positive for aspects such as ease, clarity, understanding of benefits and educational content

## Opinions regarding breeding values




**Differences by group**

**ASBV's users** more likely to agree:

- That the information presented was clear and easy to understand 3.9 (Non ASBV users 3.5)
- That the information presented helped them better understand the benefits of breeding values 4.0 (Non ASBV users 3.3)
- That the information provided valuable education material on genetics 3.9 (Non ASBV users 3.3)
- That the material encouraged them to use breeding values for purchasing decisions 4.0 (Non ASBV users 2.8)
- That they have or will use the material to seek out more information on breeding values 3.8 (Non ASBV users 3.0)
- That they will likely seek further learning about breeding values 3.8 (Non ASBV users 3.1)

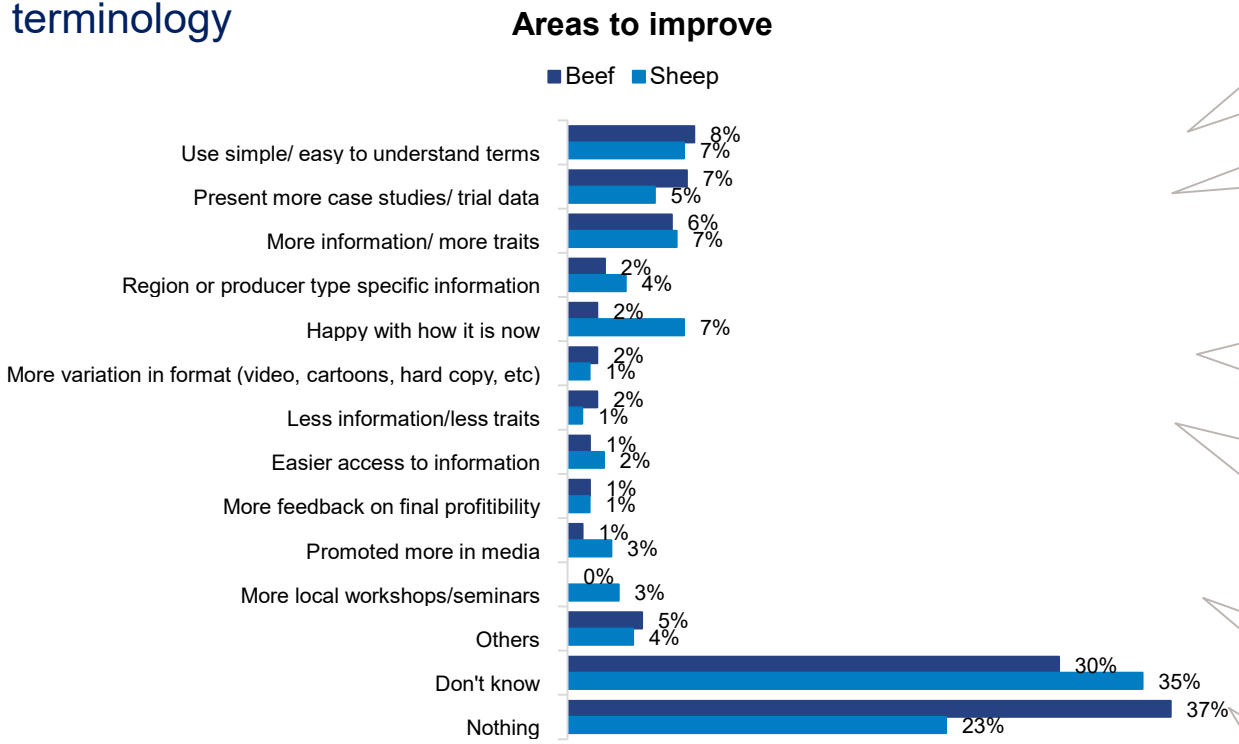
**Segmentation:**

- **Living the Life** and **Driving Growth** producers were more likely to agree that the information provided valuable education material on genetics 3.8 respectively. In contrast, **Holding Steady** 3.3 and **Winding Down** 3.0 were more likely to disagree
- **Driving Growth** producers were more likely to agree that the material encouraged them to use breeding values for purchasing decision at 3.7. The opposite sentiment was more likely to be the case for the **Holding Steady** segment 3.0 and **Winding Down** segment at 2.8

Q2.13: Based on what you've seen, heard or read from the MLA information about using breeding values, how would you rate the information against the following statements on a scale of 1 to 5 where 1 is Strongly disagree, 2 is Disagree, 3 is Neither Agree nor Disagree, 4 is Agree and 5 is Strongly agree?

Sheep producers with some campaign awareness: n = 224

# Providing more specific information on breed, traits and trial data including case studies were common themes to help lift the appeal of genetic information along with a continual focus on simple, easy to understand terminology




Base: Beef producers with some campaign awareness: n = 219
Sheep producers with some campaign awareness: n = 224

*"More commercial data, to see how the MSA grading compared between breeds"*
**Temperate beef producer**

*"More specific to individual breeds"*
**Tropical beef producer**

*"More hands on approach to those stuck in their ways to show other ways of doing things"*
**Wool producer**

*"More research into it and on the accuracy of the numbers and the flow on effects from the numbers"*
**Sheep meat producer**

*"Clearer explanation of terminology"*
**Sheep meat producer**

*"Simplify the wording; keep it concise"*
**Temperate beef producer**

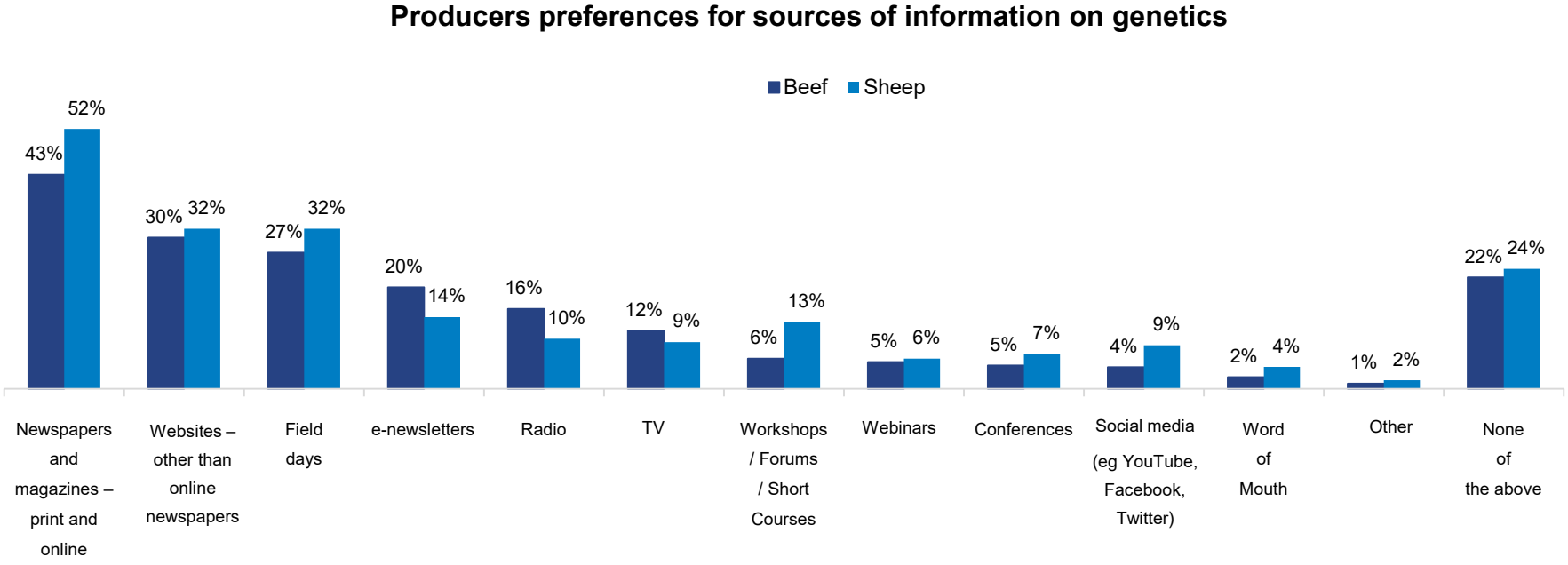
Q2.14: How do you think the genetics information could be improved to make it more appealing to you as a producer? What would you like to see changed or added?

Genetics Practices

Genetics Campaign Assessment

Communication

# Newspapers (both print and online), websites and field days were mentioned by most respondents as their preferred medium for genetic information. Multiple preferences are evident which supports the multi-media strategy used in the campaign

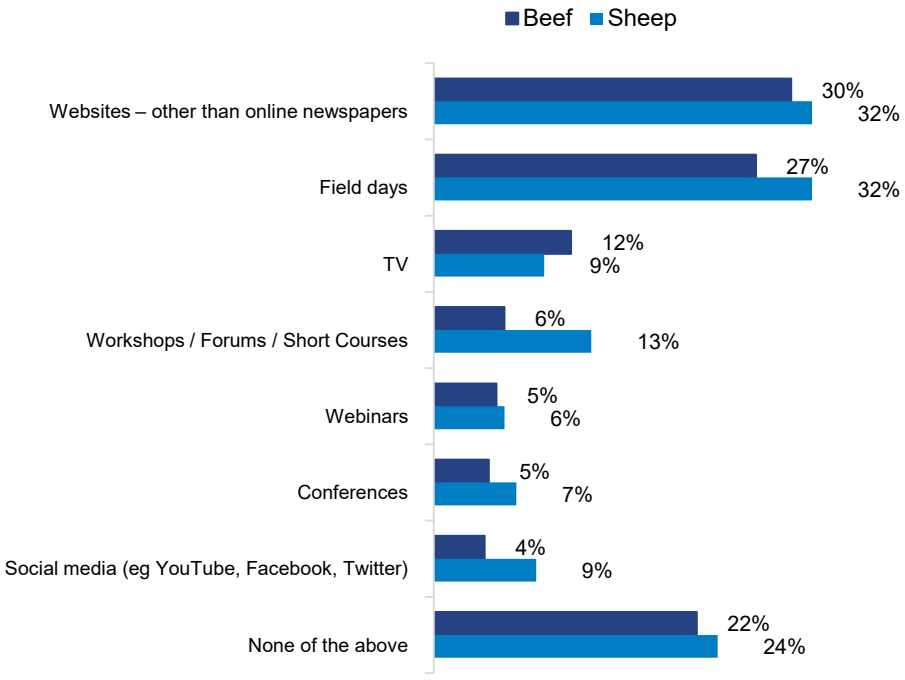



Q3.1: Which mediums do you use to obtain information **on genetics** for your (S5) operation?

Base: All Beef producers: n = 301
All Sheep producers: n = 300

# Although different types of producers were generally consistent in their preferences for media, some preferences emerged based on breeding value use, attitudinal segment and herd size

## Producers preferences for genetics media




### Differences by group

**Beef:**

- **EBV's users** and **Living the Life** segment were more likely to use websites other than online newspapers at 43% and 42% respectively
- **800+ head** of cattle producers were more likely to use Workshops / Forums / Short Courses 22%, Webinars 17%, Conferences 20% and Social Media 15%
- **EBV's users** were less likely to say they had no preference (none of the above) at 10% compared to **non users** at 31%
- No mediums used: Temperate beef 21%, Tropical beef 30%

**Sheep:**

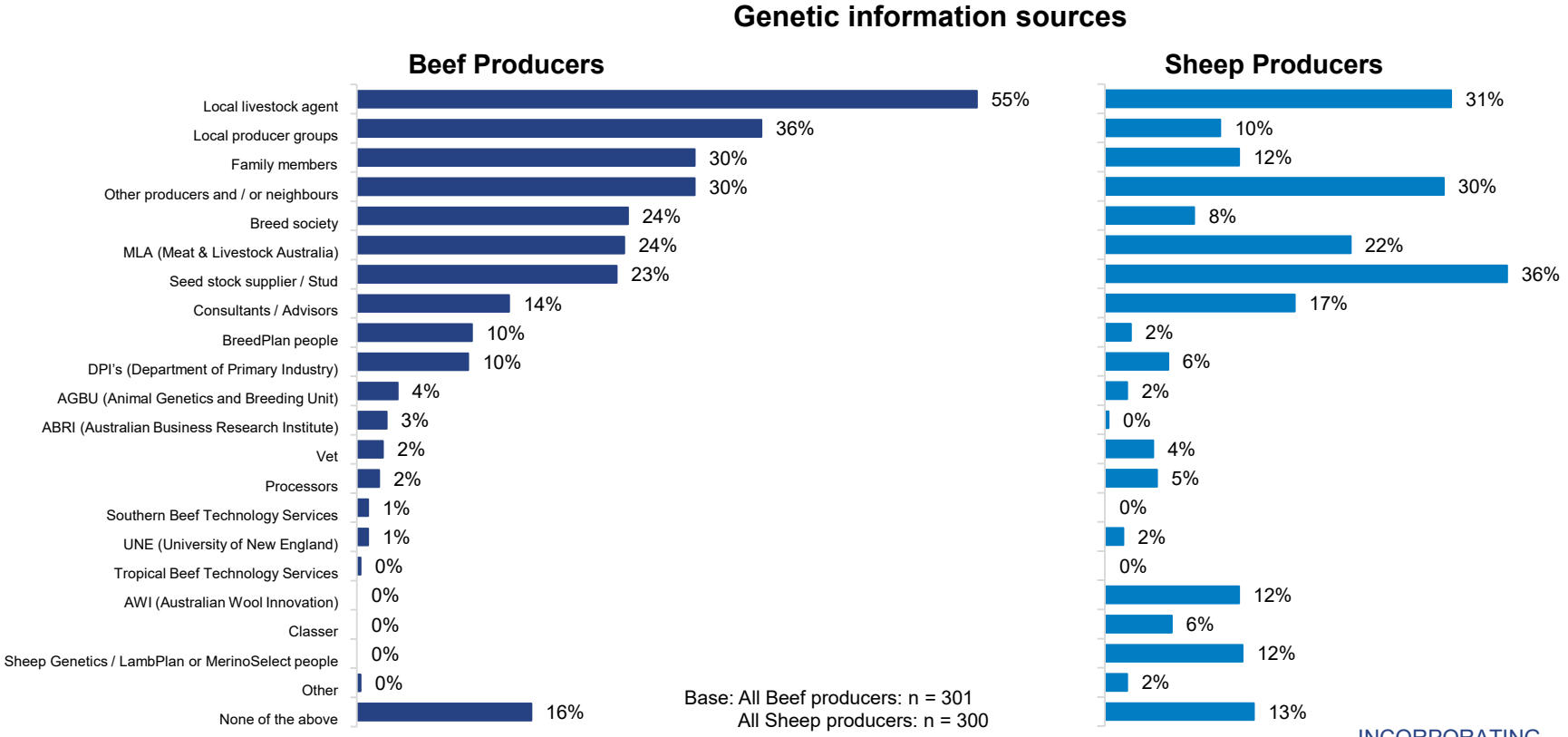
- **ASBV's users** were more likely to use websites other than online newspapers 44%, Field Days 44%, Workshops / Forums / Short Courses 21% and Webinars 11%
- The **Living the Life** segment was more likely to use TV at 21%
- **ASBV's users** were less likely to say they had no preference (none of the above) at 11% compared to **non users** at 65%

Non users have a lower propensity to consume genetics information. 1 in 3 non users say they don't use any medium for genetics information or breeding values compared to only 1 in 10 users. This makes communicating with non users more difficult

Q3.1: Which mediums do you use to obtain information **on genetics** for your (S5) operation?

Base: All Beef producers: n = 301
All Sheep producers: n = 300

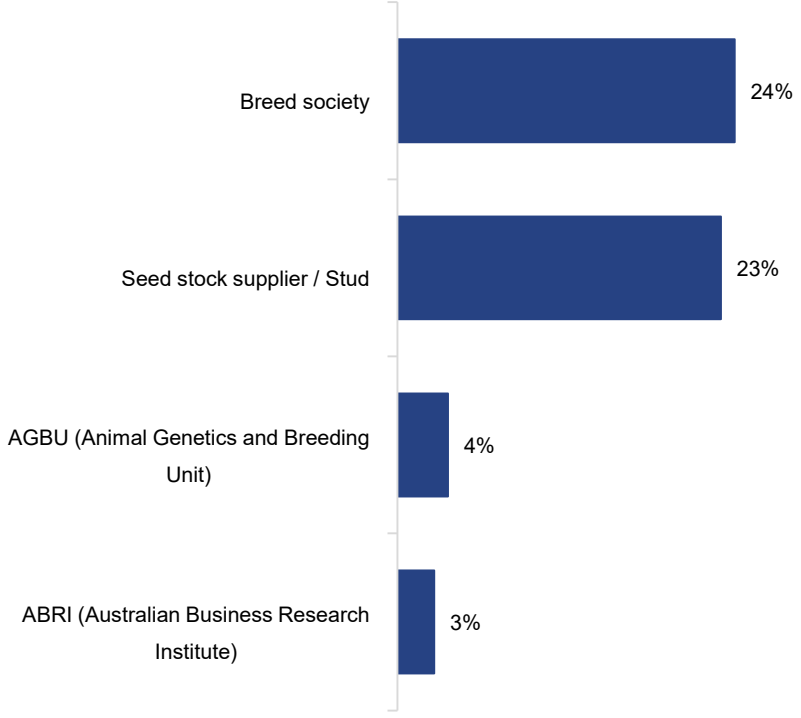
# Local livestock stock agents, studs, other producers and breed societies were the main sources of genetic information. MLA's role was also evident with the organisation making it into the top 5 mentions




Q3.2: Which people or organisations do you use to obtain information on genetics for your (SAY BEEF OR SHEEP) operation?

# The use of breed societies, studs, AGBU and ABRI for information varied somewhat depending on the type of producer

## Beef information sources




### Differences by group

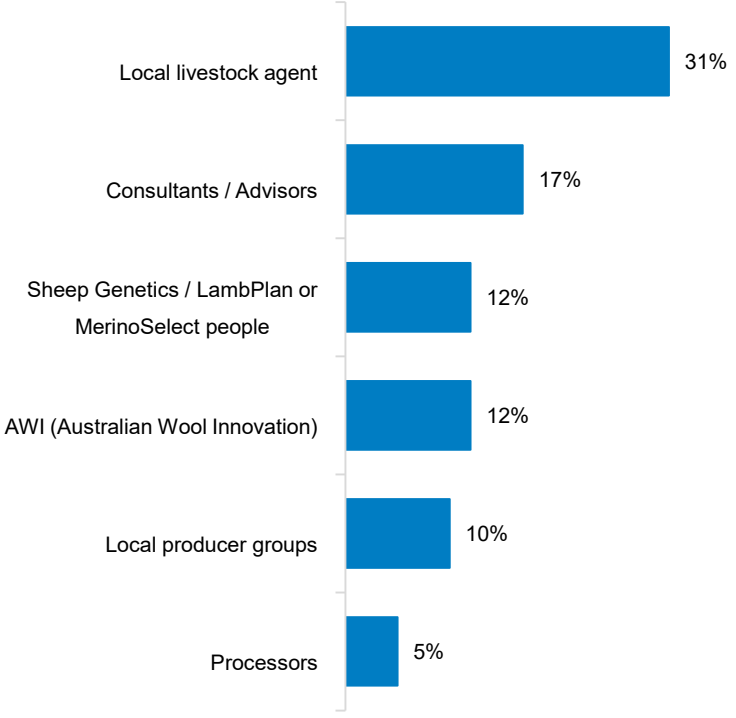
- **Living the Life** segment 35% was more likely to use the breed society as a source of information while **Commercial producers** are less likely to use at 20%
- **EBV's users** 37% were more likely to use a Seed stock supplier / Stud as a source of information
- **800+ head** cattle producers were more likely to use AGBU and ABRI as a source of information at 15% and 12% respectively
- **Tropical beef producers** appeared more independent with 33% not using any people or organisations compared to only 14% of Temperate beef producers

Q3.2: Which people or organisations do you use to obtain information on genetics for your (SAY BEEF OR SHEEP) operation?

Base: All Beef producers: n = 301

# The use of people and organisations was reasonably consistent across the sheep industry although some variation was apparent for different types of producers

## Sheep information sources




### Differences by group

- Producers with **two or more breeds** were more likely to use local livestock agents as a source of information 47%
- **ASBV's users** more likely to use:
  - Consultants / Advisors at 28%
  - Sheep Genetics / LambPlan / Merino Select people at 20%
  - Local producer groups at 17%
- **Wool producers** were more likely to use AWI as a source on information at 21
- **Living the Life** segment were more likely to use Processors as a source of information at 11%

Q3.2: Which people or organisations do you use to obtain information on genetics for your (SAY BEEF OR SHEEP) operation?

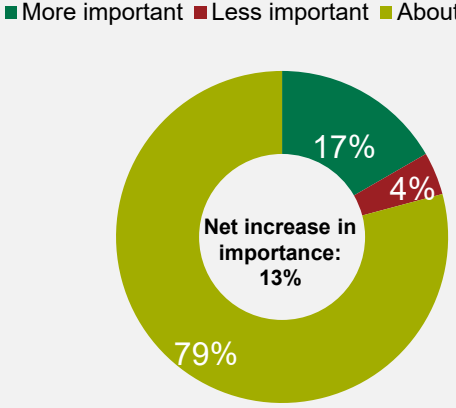
Base: All Beef producers: n = 301

# Although most beef and sheep producers rated MLA's importance as a source of genetic information as being steady over the last 12 months, overall there has been a net increase in the importance placed on MLA during and following the campaign

## Importance of MLA's as a source of genetics information

### Beef Producers

**Operation type**

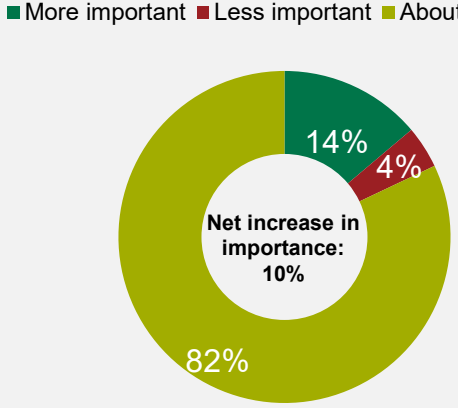



Net increase in MLA importance:
Temperate beef 11%, Tropical beef 24%

No significant differences in responses were found within the beef producer groups

### Sheep producers

**Operation type**



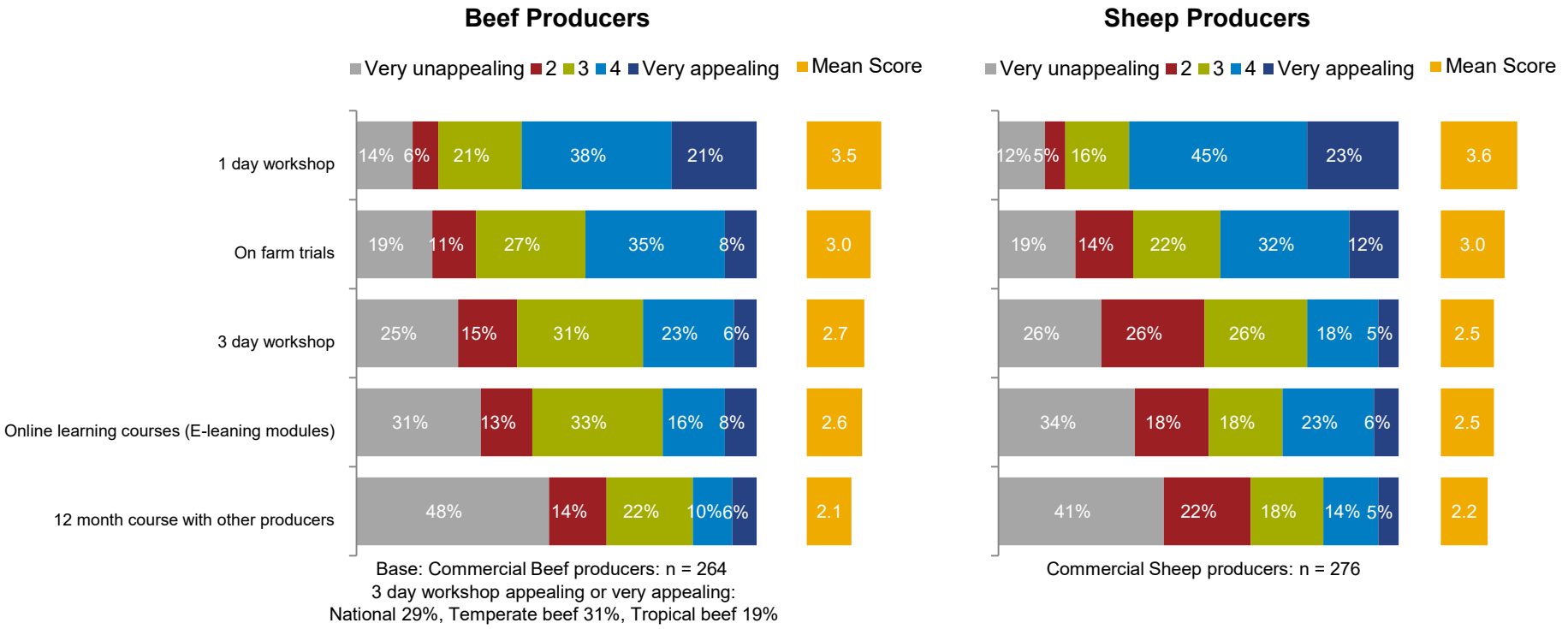

No significant differences in responses were found within the sheep producer groups

Q3.3: How has the importance you place on MLA as a source of genetic information changed over the last 12 months? Would you say MLA has become …

Base: Commercial Beef producers: n = 264
Commercial Sheep producers: n = 276

# Both beef and sheep producers clearly favoured 1 day training and on farm trials over other delivery methods

## Preferred methods of learning about on farm genetics

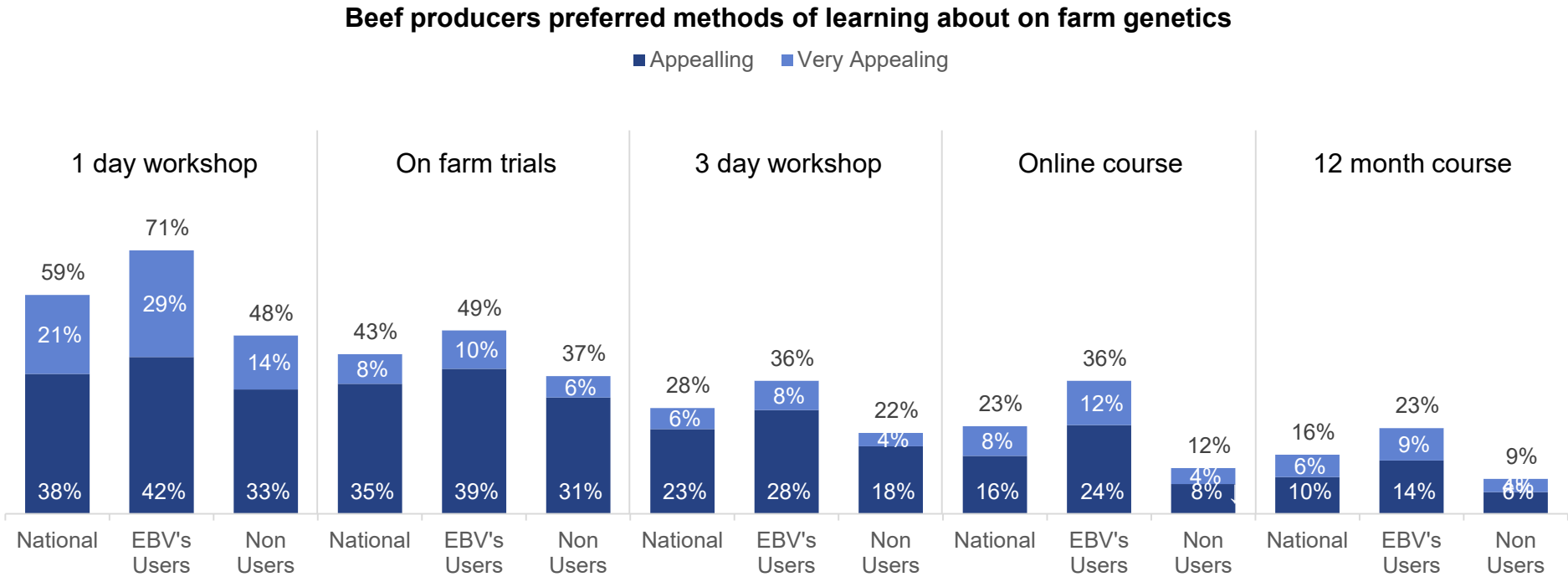



Base: Commercial Beef producers: n = 264
3 day workshop appealing or very appealing:
National 29%, Temperate beef 31%, Tropical beef 19%

Commercial Sheep producers: n = 276

Q3.4: MLA offers a number of methods through which producers can learn about **on-farm genetics**. How appealing are each of the following to you on a scale of 1 to 5 where 1 is Very unappealing, 2 is Unappealing, 3 is Neutral, 4 is Appealing and 5 is Very appealing?

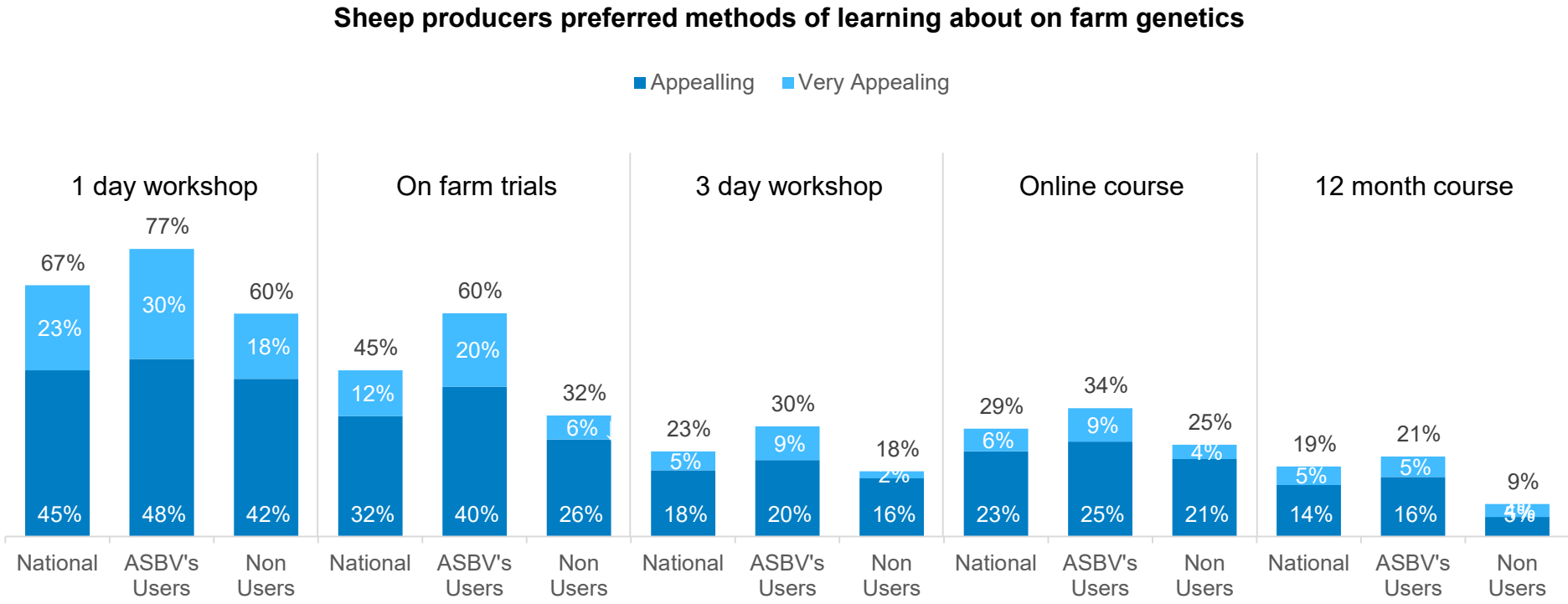
# Beef producers who do not use EBVs had a similar order of preference for different learning methods as EBV users however their willingness to learn was lower




Q3.4: MLA offers a number of methods through which producers can learn about **on-farm genetics**. How appealing are each of the following to you on a scale of 1 to 5 where 1 is Very unappealing, 2 is Unappealing, 3 is Neutral, 4 is Appealing and 5 is Very appealing?

Base: Commercial Beef producers: n = 264

# Sheep producers not using EBVs had a similar preference order for learning methods as EBV users however they were less willing to learn




Q3.4: MLA offers a number of methods through which producers can learn about **on-farm genetics**. How appealing are each of the following to you on a scale of 1 to 5 where 1 is Very unappealing, 2 is Unappealing, 3 is Neutral, 4 is Appealing and 5 is Very appealing?

Commercial Sheep producers: n = 276

# Please Contact

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