



PARLIAMENT OF AUSTRALIA
HOUSE OF REPRESENTATIVES

TONY WINDSOR MP
INDEPENDENT
FEDERAL MEMBER FOR NEW ENGLAND

Shop 5
259 Peel Street
TAMWORTH NSW 2340

All Mail: PO Box 963
TAMWORTH NSW 2340

Ph: (02) 6761 3080
Toll Free: 1300 301 839
Fax: (02) 6761 3380
e-mail: Tony.Windsor.MP@aph.gov.au
Web Page: www.tonywindsor.com.au

Media Release

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Beef Industry Survey Results Released

82% of New England Producers want better consumer education program
60% support \$5 levy continuing

New England Beef Producers want the industry to introduce a compulsory consumer oriented beef grading system and to better educate the consumer about the beef grading system.

They also have indicated that they believe the current levy totalling \$5 per head is reasonable and should stay the same.

These are two of the findings of a survey of New England cattle producers conducted by the Independent Member for New England, Tony Windsor.

“The cattle industry is a significant contributor to our regional economy and more broadly to our national economy for both domestic and export markets.

“The biggest agreement among New England Cattle Producers was that 82% believe that there needs to be more education and promotion to engage consumers with the Compulsory Beef Grading System.

“61% of producers believed there was a need for accuracy and honesty in labelling and want a universal consistent system.

“Responses indicate that the majority of producers are not satisfied with the current control measures for beef grading and want to see a compulsory grading system introduced into the industry with 1 in 2 New England producers saying a compulsory system is ‘Very Important’.

“Producer satisfaction with the current education for the Meat Standards Australia (MSA) and Budget Retail Agreement to explain beef quality to consumers is low and 77% want a new public education program introduced to market and explain the MSA Grading system to consumers.

“With regard to the current \$5 per head levy, 60% of producers believe that it is reasonable and support it staying the same.

“This response should be welcomed by the Meat and Livestock Association (MLA) as the industry prepares to vote on the continuation of the levy at \$5 past 2011.

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For further information contact Tony Windsor, Ph (02) 6761 3080 or 0427 66 8868

“Responses to the MLA’s performance shows there is room for improvement with some dissatisfaction in the way the organisation represents and promotes the industry and the way its Board is selected and its voting arrangements,” Mr Windsor said.

Mr Windsor was very pleased with the response by small and large producers to the survey.

“431 cattle producers ranging in herd size from less than 100 head to over 1,000 head kindly participated in the survey to let me know their views of their industry.

I thank those who took the opportunity to provide me with their thoughts,” Mr Windsor said.

Mr Windsor will now pass the survey results on to the Minister for Agriculture Fisheries and Forestry, Tony Burke and it will also be available on his website www.tonywindsor.com.au.

Survey Results Below

New England Cattle Industry Study

August 2009

Quantitative research conducted via post



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Includes:

- Survey Methodology
- Tables of Key Findings
- Appendix

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METHODOLOGY

Rural Press Marketing Services is pleased to deliver the results of the *New England Cattle Industry Study, August 2009*.

The Cattle Industry Study was conducted via postal interviews to 2,862 Cattle producers, utilising the Rural Press Marketing Services farmers database.

437 Cattle Producers returned postal interview sheets by fax and / or post. From this, 6 interviews were removed due to duplication, as each cattle producer could only present one interview.

The final sample of 431 Cattle Producers who accepted to complete the survey, supplied this study with the following industry size breakdown - >

	<100	87
		20%
	101 - 250	95
		22%
	251 - 500	112
		26%
Herd Size:	501 - 1000	59
		14%
	1001+	49
		11%
	No Response	29
		7%
		431
	Total	100%

All the information available within the 'Tables of Key Findings' area of this report has been strategically aligned using this demographic profile. A rounding error of $\pm 1\%$ may be evident in the data within the 'Tables of Key Findings'

HOW BENEFICIAL IS THE GOVERNMENTS ROLE IN THE BEEF INDUSTRY?

Less than one in four New England Producers in the industry rated the benefits of the government higher than neutral.

Almost 2 in every 5 New England Producers rated the Governments role as giving little benefit. While less than 5% rated that they're 'Very Beneficial'.

The smaller producers were the only group with a mean rating higher than 4 out of a possible 10, higher than the average rating of 3.85.

These trends are represented across all of the producer herd sizes, indicating that there is a general consensus that the Governments role in the Beef industry gives little benefit to many New England Producers or the Beef Industry itself.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Not Beneficial at all	119 28%	21 24%	30 32%	32 29%	17 29%	12 24%	7 24%
2	42 10%	6 7%	10 11%	11 10%	6 10%	5 10%	4 14%
3	34 8%	4 5%	5 5%	11 10%	3 5%	6 12%	5 17%
4	35 8%	5 6%	10 11%	8 7%	5 8%	6 12%	1 3%
Neutral	104 24%	31 36%	21 22%	25 22%	12 20%	9 18%	6 21%
6	25 6%	6 7%	7 7%	6 5%	2 3%	1 2%	3 10%
7	23 5%	7 8%	2 2%	6 5%	6 10%	2 4%	- -
8	20 5%	3 3%	4 4%	4 4%	3 5%	5 10%	1 3%
9	- -	- -	- -	- -	- -	- -	- -
Very Beneficial	18 4%	3 3%	5 5%	6 5%	3 5%	1 2%	- -
No Response	11 3%	1 1%	1 1%	3 3%	2 3%	2 4%	2 7%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	3.85	4.17	3.70	3.80	3.96	3.81	3.33

HOW SIGNIFICANT ARE THE GOVERNMENT INFLUENCED COSTS & CHARGES ON YOUR BUSINESS OPERATIONS?

Interestingly, it was the smaller producers that had the highest rating for the benefits of the government, yet more than a third find the 'Government Influenced costs & charges' to be 'Very Significant' on their business operations.

It is the largest producers that found the costs and charges the least significant with a mean rating of 7.31 out of 10.

Generally, New England Producers identified that they felt the costs and charges were highly significant in regards to their business operation, with an average rating of 7.60 from a possible 10.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
Not Significant at all	13	1	3	2	3	2	2
	3%	1%	3%	2%	5%	4%	7%
2	4	1	1	1	1	-	-
	1%	1%	1%	1%	2%	-	-
3	12	1	3	2	2	4	-
	3%	1%	3%	2%	3%	8%	-
4	12	5	-	2	1	3	1
	3%	6%	-	2%	2%	6%	3%
Neutral	58	20	10	16	6	2	4
	13%	23%	11%	14%	10%	4%	14%
6	25	6	8	2	4	5	-
	6%	7%	8%	2%	7%	10%	-
7	51	6	14	14	6	6	5
	12%	7%	15%	13%	10%	12%	17%
8	68	11	14	15	14	8	6
	16%	13%	15%	13%	24%	16%	21%
9	33	4	7	9	6	4	3
	8%	5%	7%	8%	10%	8%	10%
Very Significant	148	31	35	45	16	15	6
	34%	36%	37%	40%	27%	31%	21%
No Response	7	1	-	4	-	-	2
	2%	1%	-	4%	-	-	7%
Total	431	87	95	112	59	49	29
	100%	100%	100%	100%	100%	100%	100%
MEAN	7.60	7.42	7.74	7.95	7.41	7.31	7.26

HOW SATISFIED DO YOU FEEL WITH THE CURRENT CONTROL MEASURES FOR THE MARKETING OF BEEF QUALITY IN AUSTRALIA?

Both the smallest and largest producers rated the highest satisfaction with the current control measures for beef grading with a mean rating of 4.47 and 4.00 respectively. However, this rating confirms that producers are not satisfied with the current measures in place.

With less than 1 in 4 farmers rating above neutral there is little satisfaction amongst the New England Producers for what measures are currently being undertaken. This is heavily supported by more than 1 in 4 producers that indicated they were 'Not satisfied at all'.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Not Satisfied at all	120 28%	21 24%	27 28%	40 36%	13 22%	12 24%	7 24%
2	30 7%	4 5%	7 7%	5 4%	6 10%	4 8%	4 14%
3	50 12%	8 9%	10 11%	13 12%	8 14%	7 14%	4 14%
4	31 7%	5 6%	11 12%	7 6%	5 8%	2 4%	1 3%
Neutral	98 23%	26 30%	23 24%	23 21%	13 22%	9 18%	4 14%
6	29 7%	5 6%	6 6%	5 4%	5 8%	8 16%	- -
7	24 6%	5 6%	5 5%	5 4%	4 7%	2 4%	3 10%
8	17 4%	4 5%	2 2%	5 4%	2 3%	2 4%	2 7%
9	5 1%	1 1%	- -	2 2%	1 2%	- -	1 3%
Very Satisfied	21 5%	8 9%	3 3%	7 6%	- -	2 4%	1 3%
No Response	6 1%	- -	1 1%	- -	2 3%	1 2%	2 7%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	3.95	4.47	3.69	3.79	3.81	4.00	3.96

HOW IMPORTANT DO YOU FEEL THE INTRODUCTION OF A COMPULSORY CONSUMER ORIENTED BEEF GRADING SYSTEM IS FOR THE INDUSTRY?

There is clearly support for a compulsory grading system to be introduced into the industry with nearly 1 in 2 farmers seeing that as a 'Very Important' introduction.

Significantly, almost 60% of the largest producers rate it highest, with a mean of 8.54. There is a clear trend from the previous question regarding the dissatisfaction with the current system with less than 1 in 10 of the producers indicating that a new compulsory system is 'Not Important at all'. Overall, approximately 1 in 2 New England Producers indicated that they felt a compulsory system is 'Very Important'.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
Not Important at all	31 7%	8 9%	3 3%	12 11%	5 8%	2 4%	1 3%
2	3 1%	1 1%	1 1%	- -	- -	1 2%	- -
3	4 1%	1 1%	1 1%	1 1%	- -	- -	1 3%
4	3 1%	1 1%	1 1%	- -	- -	- -	1 3%
Neutral	60 14%	13 15%	14 15%	18 16%	5 8%	3 6%	7 24%
6	14 3%	2 2%	2 2%	3 3%	4 7%	2 4%	1 3%
7	24 6%	5 6%	7 7%	4 4%	6 10%	2 4%	- -
8	50 12%	11 13%	11 12%	12 11%	6 10%	6 12%	4 14%
9	34 8%	7 8%	8 8%	11 10%	4 7%	3 6%	1 3%
Very Important	204 47%	37 43%	47 49%	50 45%	29 49%	29 59%	12 41%
No Response	4 1%	1 1%	- -	1 1%	- -	1 2%	1 3%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	7.86	7.53	8.14	7.62	7.97	8.54	7.50

HOW IMPORTANT DO YOU FEEL THE INTRODUCTION OF A COMPULSORY CONSUMER ORIENTED BEEF GRADING SYSTEM IS FOR THE INDUSTRY?

Why do you feel this way?

There is a visible trend with almost a third of the New England Producers indicating that they expect Accuracy and Honesty in labelling in a new system.

Similarly, approximately 3 in every 10 believe that there is a need for a universal consistent system in place.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
Need Accuracy and Honesty in Labelling	138 32%	30 34%	35 37%	37 33%	18 31%	14 29%	4 14%
Need a Universal Consistent System in Place	127 29%	27 31%	28 29%	30 27%	16 27%	19 39%	7 24%
There are no High Quality Benefits for Producers	37 9%	6 7%	10 11%	10 9%	4 7%	3 6%	4 14%
Consumers have lost confidence through bad experiences	33 8%	8 9%	6 6%	12 11%	3 5%	2 4%	2 7%
Unhappy with MLA/ Government Run Systems	26 6%	4 5%	3 3%	4 4%	8 14%	5 10%	2 7%
Beef must be competitive with the other Meat Industries & Internationally	25 6%	4 5%	5 5%	7 6%	4 7%	5 10%	- -
Price overrides quality for many consumers	13 3%	5 6%	4 4%	1 1%	2 3%	- -	1 3%
Large Companies such as Coles & Woolworths need to support the MSA for the scheme to be successful	13 3%	3 3%	1 1%	4 4%	2 3%	1 2%	2 7%
Happy with MSA Scheme	13 3%	1 1%	1 1%	3 3%	4 7%	2 4%	2 7%
Consumer Support/ Education is most important	7 2%	- -	3 3%	2 2%	1 2%	1 2%	- -
Other	4 1%	1 1%	1 1%	2 2%	- -	- -	- -
No Response/ Not Specified	47 11%	9 10%	11 12%	11 10%	5 8%	5 10%	6 21%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

Full responses can be found within appendix a, pg's 24 - 30

AS A WHOLE DO YOU BELIEVE THE GENERAL LEVEL OF BEEF CONSUMPTION BY AUSTRALIANS HAS INCREASED, STAYED THE SAME OR DECREASED?

There is a trend amongst New England Producers that indicates that there has been no growth seen in the Industry as a whole. This is identified by more than a third; however, approximately 1 in 2 indicated that it has actually decreased.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
Increased	56 13%	13 15%	11 12%	14 13%	8 14%	6 12%	4 14%
Stayed the Same	151 35%	37 43%	37 39%	36 32%	17 29%	13 27%	11 38%
Decreased	207 48%	36 41%	46 48%	56 50%	31 53%	27 55%	11 38%
Don't Know	17 4%	1 1%	1 1%	6 5%	3 5%	3 6%	3 10%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

AS A WHOLE DO YOU BELIEVE THE GENERAL LEVEL OF BEEF CONSUMPTION BY AUSTRALIANS HAS INCREASED, STAYED THE SAME OR DECREASED?

Why do you feel this way?

There is a general consensus of 1 in 5 New England Producers across the herd sizes, who believe it is 'Competition with other Meat Industries' that is impacting Beef consumption in Australia the most visibly.

Similarly 16% believe that many households are cutting back on beef due to financial issues, where beef is seen as more of a luxury item due to its price.

1 in 10 of the producers indicated that they were concerned that the decrease was due to consumers having bad experiences with poor quality meat, and called for a more consistent quality grading system.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
Competition with other Meat Industries	87 20%	16 18%	18 19%	28 25%	10 17%	9 18%	6 21%
Consumption levels affected by Economic Climate/ Too Expensive for Many households	67 16%	21 24%	14 15%	12 11%	9 15%	6 12%	5 17%
Beef needs to have more Consistency & Honesty in its quality	49 11%	12 14%	5 5%	15 13%	8 14%	7 14%	2 7%
Statistics show a drop in Beef consumption per capita	46 11%	4 5%	12 13%	8 7%	11 19%	8 16%	3 10%
MLA have not successfully controlled or promoted the Industry	46 11%	7 8%	12 13%	9 8%	11 19%	4 8%	3 10%
Negative Media Portrayal of Beef	43 10%	9 10%	7 7%	15 13%	5 8%	3 6%	4 14%
Higher Cost for Consumer Contradicts low Price for Producers	31 7%	10 11%	5 5%	11 10%	1 2%	2 4%	2 7%
Loss of confidence in Beef industry due to poor experiences	26 6%	6 7%	5 5%	4 4%	4 7%	7 14%	- -
No Significant Change in Consumption Levels	23 5%	6 7%	7 7%	3 3%	6 10%	1 2%	- -
Beef Industry is Well Organised & Produces Good Products	13 3%	3 3%	1 1%	8 7%	1 2%	- -	- -
Other	3 1%	- -	3 3%	- -	- -	- -	- -
No Response/ Not Specified	84 19%	14 16%	21 22%	22 20%	9 15%	9 18%	9 31%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

Full responses can be found within appendix b, pg's 31 - 36

HOW SATISFIED DO YOU FEEL THE MSA AND BUDGET RETAIL AGREEMENT EXPLAIN BEEF QUALITY TO THE CONSUMERS?

Producer satisfaction with the current education for consumers is clearly low. This is explained through an average mean of 3.65 and each producer group mean ratings remaining below neutral. In the same way more than 1 in 4 New England Producers rated that they were 'Not Satisfied at all'.

With fairly similar ratings seen across herd size and previous questions it is evident that the New England Producers are not satisfied with the current system, especially with how it was marketed and promoted to the consumer.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Not Satisfied at all	118 27%	21 24%	30 32%	33 29%	15 25%	12 24%	7 24%
2	43 10%	9 10%	8 8%	14 13%	4 7%	6 12%	2 7%
3	37 9%	7 8%	8 8%	10 9%	6 10%	3 6%	3 10%
4	33 8%	3 3%	10 11%	8 7%	5 8%	6 12%	1 3%
Neutral	107 25%	27 31%	28 29%	25 22%	10 17%	9 18%	8 28%
6	15 3%	3 3%	3 3%	5 4%	2 3%	1 2%	1 3%
7	17 4%	3 3%	2 2%	2 2%	3 5%	4 8%	3 10%
8	15 3%	4 5%	- -	4 4%	4 7%	3 6%	- -
9	6 1%	- -	1 1%	- -	4 7%	1 2%	- -
Very Satisfied	10 2%	2 2%	2 2%	4 4%	1 2%	1 2%	- -
No Response	30 7%	8 9%	3 3%	7 6%	5 8%	3 6%	4 14%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	3.65	3.77	3.38	3.47	4.11	3.89	3.64

DO YOU BELIEVE THAT A PUBLIC EDUCATION PROGRAM SHOULD BE UNDERTAKEN TO EXPLAIN... THE MSA GRADING SYSTEM?

With the support of more than 3 in every 4 New England Producers, a new public education program should be introduced to market and explain the MSA Grading system to consumers.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Yes	330 77%	59 68%	78 82%	88 79%	42 71%	41 84%	22 76%
No	58 13%	15 17%	10 11%	17 15%	10 17%	3 6%	3 10%
Don't Know	43 10%	13 15%	7 7%	7 6%	7 12%	5 10%	4 14%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

DO YOU BELIEVE THAT A PUBLIC EDUCATION PROGRAM SHOULD BE UNDERTAKEN TO EXPLAIN... VOLUNTARY BUDGET RETAIL AGREEMENT?

Significant backing across the herd sizes, more than six in every 10 New England Producers, confirms the need for a new public education program to promote the Voluntary Budget Retail Agreement.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Yes	261 61%	49 56%	61 64%	72 64%	34 58%	31 63%	14 48%
No	91 21%	21 24%	19 20%	24 21%	11 19%	10 20%	6 21%
Don't Know	79 18%	17 20%	15 16%	16 14%	14 24%	8 16%	9 31%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

DO YOU BELIEVE THAT A PUBLIC EDUCATION PROGRAM SHOULD BE UNDERTAKEN TO EXPLAIN... COMPULSORY BEEF GRADING SYSTEM?

Most significantly, 8 in every 10 New England Producers agree that there needs to be more education and promotion to engage consumers with the Compulsory Beef Grading System.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Yes	355 82%	73 84%	85 89%	90 80%	49 83%	42 86%	16 55%
No	45 10%	8 9%	7 7%	16 14%	6 10%	3 6%	5 17%
Don't Know	31 7%	6 7%	3 3%	6 5%	4 7%	4 8%	8 28%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

HOW WELL DO YOU FEEL THE MLA... SUPPORT THE BEEF INDUSTRY?

Overall the rating of support for the beef industry by the MLA is perceived as fairly neutral, with approximately a quarter of New England Producers indicating that felt the MLA supports the industry neither positively or negatively.

This is evident across the herd sizes with each of the mean ratings remaining around 5, and a total average of 5.23 from a possible 10.

However, while this appears fairly non-aligned, it is important to note that less than 5% of New England Producers felt that the MLA supports the industry 'Very Well'. Further to this, 15% of the Producers rated the support as poor.

Interestingly, it was in the group of largest producers that 1 in 10 felt that the support was 'Poor', whilst another 1 in 10 identified the complete opposite; that the MLA supports the industry 'Very Well'.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
Poorly	64 15%	16 18%	13 14%	21 19%	7 12%	5 10%	2 7%
2	17 4%	1 1%	5 5%	7 6%	1 2%	3 6%	- -
3	21 5%	- -	5 5%	3 3%	3 5%	5 10%	5 17%
4	26 6%	3 3%	3 3%	6 5%	6 10%	4 8%	4 14%
Neutral	104 24%	22 25%	28 29%	29 26%	11 19%	11 22%	3 10%
6	34 8%	4 5%	13 14%	5 4%	7 12%	4 8%	1 3%
7	53 12%	11 13%	13 14%	16 14%	6 10%	2 4%	5 17%
8	56 13%	15 17%	6 6%	15 13%	13 22%	5 10%	2 7%
9	17 4%	6 7%	1 1%	3 3%	2 3%	3 6%	2 7%
Very Well	19 4%	5 6%	6 6%	1 1%	1 2%	5 10%	1 3%
No Response	20 5%	4 5%	2 2%	6 5%	2 3%	2 4%	4 14%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	5.23	5.60	5.12	4.83	5.49	5.36	5.32

HOW WELL DO YOU FEEL THE MLA... SUCCESSFULLY MARKETS THE BEEF INDUSTRY?

There is an evident trend represented by the New England Producers that the MLA has not successfully supported and marketed the Beef Industry. Only 2% of producers indicating they felt that the Beef industry was marketed 'Very Well' whilst 15% felt it was marketed 'Poorly'.

The mean ratings across the herd sizes remain neutral, ranging from 4.56 to 5.41, with an average of 4.93 from a possible 10.

	Total	Cattle Herd Size					
		< 100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Poorly	65 15%	14 16%	13 14%	20 18%	8 14%	6 12%	4 14%
2	28 6%	1 1%	6 6%	12 11%	3 5%	6 12%	- -
3	19 4%	1 1%	4 4%	5 4%	2 3%	3 6%	4 14%
4	26 6%	6 7%	8 8%	6 5%	4 7%	- -	2 7%
Neutral	96 22%	22 25%	24 25%	24 21%	10 17%	12 24%	4 14%
6	50 12%	8 9%	18 19%	9 8%	10 17%	4 8%	1 3%
7	59 14%	11 13%	13 14%	15 13%	8 14%	6 12%	6 21%
8	46 11%	12 14%	6 6%	11 10%	9 15%	5 10%	3 10%
9	10 2%	5 6%	- -	1 1%	1 2%	2 4%	1 3%
Very Well	7 2%	3 3%	- -	2 2%	- -	2 4%	- -
No Response	25 6%	4 5%	3 3%	7 6%	4 7%	3 6%	4 14%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	4.93	5.41	4.74	4.56	5.15	5.02	5.00

HOW WELL DO YOU FEEL THE MLA... REGULATES THE BEEF INDUSTRY?

Only 3% of New England Producers felt that the MLA regulates the Beef Industry 'Very Well' whilst 16% felt that the job is done 'Poorly'. Whilst almost 1 in 3 remained neutral on the topic.

Once again, the mean ratings by each of the herd size remained below 'Neutral' with an average of 4.49 from the possible 10.

The lack of regulation was identified by more than 6 in every 10 of the producers.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Poorly	70 16%	14 16%	17 18%	20 18%	8 14%	9 18%	2 7%
2	38 9%	7 8%	5 5%	12 11%	4 7%	5 10%	5 17%
3	17 4%	3 3%	6 6%	2 2%	- -	4 8%	2 7%
4	32 7%	3 3%	10 11%	6 5%	10 17%	- -	3 10%
Neutral	123 29%	27 31%	30 32%	30 27%	13 22%	16 33%	7 24%
6	26 6%	6 7%	9 9%	5 4%	3 5%	1 2%	2 7%
7	42 10%	7 8%	7 7%	13 12%	10 17%	4 8%	1 3%
8	27 6%	6 7%	4 4%	8 7%	4 7%	2 4%	3 10%
9	4 1%	1 1%	1 1%	1 1%	1 2%	- -	- -
Very Well	11 3%	4 5%	1 1%	3 3%	1 2%	2 4%	- -
No Response	41 10%	9 10%	5 5%	12 11%	5 8%	6 12%	4 14%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	4.49	4.69	4.32	4.48	4.81	4.21	4.32

DO YOU PAY THE MLA LEVY?

These figures identify that the majority of the New England Producers are aware of the MLA levy and what their requirements are in regards to the payments.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Yes	406 94%	79 91%	91 96%	107 96%	57 97%	48 98%	24 83%
No	11 3%	5 6%	- -	1 1%	2 3%	1 2%	2 7%
Unsure	14 3%	3 3%	4 4%	4 4%	- -	- -	3 10%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

DO YOU PAY THE MLA LEVY?

Why / Why Not?

Understandably, more than a third of New England Producers indicated that they were aware of the 'Compulsory Levy payment' and for some it was 'taken before receiving their payment from sales'.

Whilst 1 in 10 of the producers identified that they were 'Unhappy with the current services on the MLA' and felt that the 'Levy is an unnecessary cost'.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
It is a Compulsory Payment	134 31%	16 18%	34 36%	39 35%	22 37%	15 31%	8 28%
Not Happy with Current Services of the MLA/ Could be Improved	37 9%	8 9%	6 6%	11 10%	6 10%	4 8%	2 7%
To Finance Marketing and Promotion of the Beef Industry	35 8%	9 10%	4 4%	9 8%	3 5%	9 18%	1 3%
Levy payment Made before receiving payment from Sale	25 6%	6 7%	6 6%	5 4%	- -	6 12%	2 7%
MLA Support the Beef Industry, Producers Should Support it in Return	13 3%	4 5%	2 2%	4 4%	2 3%	- -	1 3%
Feel the Levy is an unnecessary cost/ Too Expensive	4 1%	- -	2 2%	1 1%	- -	- -	1 3%
Other	5 1%	1 1%	- -	- -	2 3%	1 2%	1 3%
No Response/ Not Specified	187 43%	43 49%	45 47%	45 40%	25 42%	16 33%	13 45%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

Full responses can be found within appendix c, pg's 37 - 38

DO YOU BELIEVE THE CURRENT LEVY IS TOO CHEAP, REASONABLE OR TOO EXPENSIVE?

With almost 6 from every 10 New England Producers confirming that the current levy is a reasonable price. It is important to note that this is supported most significantly by both the smallest and largest herd sizes, with the lowest ratings for 'Too Expensive'.

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Too Cheap	6 1%	1 1%	- -	4 4%	1 2%	- -	- -
Reasonable	248 58%	60 69%	52 55%	62 55%	32 54%	30 61%	12 41%
Too Expensive	167 39%	26 30%	40 42%	45 40%	26 44%	17 35%	13 45%
Don't Know	10 2%	- -	3 3%	1 1%	- -	2 4%	4 14%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

THE CURRENT LEVY IS \$5 A HEAD UNTIL 2011; DO YOU BELIEVE THE LEVY SHOULD THEN INCREASE, STAY THE SAME OR DECREASE?

Clearly the majority of New England Producers, almost 6 in every 10, support the Levy remaining at the current rate. However, approximately a third feels that it should be lowered in the future.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
Increase	28 6%	7 8%	4 4%	5 4%	7 12%	4 8%	1 3%
Stayed the Same	252 58%	60 69%	55 58%	67 60%	30 51%	28 57%	12 41%
Decrease	137 32%	18 21%	33 35%	37 33%	21 36%	16 33%	12 41%
Don't Know	14 3%	2 2%	3 3%	3 3%	1 2%	1 2%	4 14%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%

HOW SATISFIED ARE YOU WITH THE CURRENT... PROCESS OF SELECTION FOR THE MLA BOARD OF DIRECTORS?

Most notable is the neutral rating for the selection process, with 4 in every 10 New England Producers indicating that they feel neither positively or negatively towards the process. However, this may indicate that many of the producers are in fact not sufficiently aware of the process to reasonably rate their satisfaction.

There is clearly a lack of satisfaction, with only 16% of the producers indicating that they were in anyway satisfied with the selection process, whilst almost 1 in 4 are 'Not Satisfied at all'. This is supported by an average rating of 4.21 out of 10.

	Total	Cattle Herd Size					Not Specified
		<100	101 - 250	251 - 500	501 - 1000	1001+	
Not Satisfied at all	99 23%	21 24%	21 22%	29 26%	11 19%	13 27%	4 14%
2	24 6%	2 2%	10 11%	7 6%	2 3%	1 2%	2 7%
3	13 3%	1 1%	4 4%	2 2%	2 3%	3 6%	1 3%
4	16 4%	2 2%	3 3%	5 4%	3 5%	1 2%	2 7%
Neutral	173 40%	38 44%	40 42%	42 38%	24 41%	19 39%	10 34%
6	11 3%	4 5%	2 2%	2 2%	1 2%	- -	2 7%
7	19 4%	2 2%	5 5%	7 6%	3 5%	2 4%	- -
8	20 5%	9 10%	3 3%	2 2%	4 7%	2 4%	- -
9	4 1%	2 2%	- -	- -	- -	1 2%	1 3%
Very Satisfied	15 3%	3 3%	1 1%	4 4%	3 5%	4 8%	- -
No Response	37 9%	3 3%	6 6%	12 11%	6 10%	3 6%	7 24%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	4.21	4.57	3.89	3.96	4.57	4.39	4.09

HOW SATISFIED ARE YOU WITH THE CURRENT... MLA VOTING ARRANGEMENTS?

With 1 in 5 New England Producers indicating that they are 'Not Satisfied at all' with the current MLA voting arrangements, there is noticeably a lack of support for the current process. Additionally another 2 in every 5 producers gave a neutral rating. This negative rating, supported by an average of 4.47 from a possible 10, shows a visible trend away from satisfaction with the current MLA arrangements.

	Total	Cattle Herd Size					
		< 100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
Not Satisfied at all	86 20%	18 21%	17 18%	27 24%	10 17%	10 20%	4 14%
2	22 5%	1 1%	8 8%	5 4%	2 3%	3 6%	3 10%
3	15 3%	- -	4 4%	2 2%	3 5%	2 4%	4 14%
4	10 2%	2 2%	2 2%	5 4%	1 2%	- -	- -
Neutral	159 37%	36 41%	38 40%	43 38%	20 34%	16 33%	6 21%
6	13 3%	2 2%	2 2%	4 4%	3 5%	- -	2 7%
7	16 4%	3 3%	6 6%	3 3%	- -	3 6%	1 3%
8	32 7%	9 10%	4 4%	7 6%	8 14%	3 6%	1 3%
9	6 1%	2 2%	1 1%	1 1%	1 2%	1 2%	- -
Very Satisfied	17 4%	6 7%	1 1%	2 2%	3 5%	4 8%	1 3%
No Response	55 13%	8 9%	12 13%	13 12%	8 14%	7 14%	7 24%
Total	431 100%	87 100%	95 100%	112 100%	59 100%	49 100%	29 100%
MEAN	4.47	4.95	4.19	4.12	4.86	4.67	4.05

OTHER COMMENTS

All comments have been categorised using this table, and appear separately within appendix d

	Total	Cattle Herd Size					
		<100	101 - 250	251 - 500	501 - 1000	1001+	Not Specified
MLA	86	12	12	28	16	9	9
	20%	14%	13%	25%	27%	18%	31%
Sales Processes/ Returns to Producers	61	7	15	18	10	7	4
	14%	8%	16%	16%	17%	14%	14%
Beef Quality & Price	51	3	13	9	14	9	3
	12%	3%	14%	8%	24%	18%	10%
MSA Grading Scheme	47	6	8	20	7	5	1
	11%	7%	8%	18%	12%	10%	3%
Marketing & Promotion of the Industry	45	11	8	12	6	6	2
	10%	13%	8%	11%	10%	12%	7%
Government Regulations/ Influence	38	11	7	11	3	5	1
	9%	13%	7%	10%	5%	10%	3%
International Matters	20	2	5	6	5	2	-
	5%	2%	5%	5%	8%	4%	-
Levy	20	4	7	4	2	1	2
	5%	5%	7%	4%	3%	2%	7%
Company Market Dominance: Coles & Woolworths	8	1	1	3	2	1	-
	2%	1%	1%	3%	3%	2%	-
Other	4	1	1	1	-	-	1
	1%	1%	1%	1%	-	-	3%
No Response/ Not Specified	134	35	34	27	10	17	11
	31%	40%	36%	24%	17%	35%	38%
Total	431	87	95	112	59	49	29
	100%	100%	100%	100%	100%	100%	100%

Full responses can be found within appendix d, pg's 39 - 51