SUMMARY OF RESPONSES

Section 1: Your Farm and Your Market Outlets

[0	68 retu	rns from 173	distributed, w	ith 4 returns	providing un	usable resp	onses]	
Please	complet	e the following s Responses sh	tatements own as: total	s or as mean	(± s.d), as ap	ppropriate		
1.1	I am the owner and/or the manager of this farm business (please tick appropriate boxes) [Owner of the farm business 62 Manager of the farm business 3 {3 nil responses}							
1.2	I have h	neld managerial ı						
1.3	I own or manage, or have a direct commercial interest (including shareholdings) in non-farm processing or marketing concerns (e.g. auction mart, abattoir, shop etc.): Tick one box only. Yes 9 No 57 {4 nil responses}							
	If Yes,	Please specify the	he type of conce	ern(s) and the ty	pe of interest			
	Shareho	older or director	in auctionmart	7; Marketing C	Coop shareholde	r 1;		
	Process	sing company sh	areholder 1.					
1.4	I hold p	oositions of respo	onsibility (for ex	ample, chairma	n, secretary or d	irector) with:	•••••	
ma noi	rketing on-farm/f	Tick any or all co-operative? company (auctio ood business? organisation	that apply. [Nu n mart etc.)?	1 far far 1 pro	onses from 68 mer organisation m transport conductions or retail blic body or authors.	n? cern? ing concern?	7	
1.5	I live ap	proximately 9	(±6.7) miles fr	om my nearest a	auction mart.			
1.6								
		less than 3	3 to 6	7 to 10	more than 10			
% of re	esponses	: 40	51	3	7			

- I used 2 (± 1.4) (number of) different market outlets and/or auction marts to sell sheep 1.7 (of any type) last year.
- 1.8 I used 2 (± 0.9) (number of) different market outlets and/or auction marts to sell cattle (of any type) last year.
- 1.9 During the year, I visit an auction mart between $3 (\pm 3.6)$ times and $6 (\pm 6.4)$ times per month.
- On average (over all visits during the year), I spend about 42 (± 93) hrs. at the mart, 1.10 and I take between $2 (\pm 4.6)$ hrs. and $3 (\pm 6.4)$ hrs. getting there and back.

1.11 Have you joined a Quality Assurance Scheme (QAS)/Farm Assured Scheme for your cattle or sheep?

Yes 56% Please tick one box only.
No 34% Membership refused 0%

If YES, which one(s)? (of the 45 'yes' responses:

39 in FABBL; 2 in FAS; 1 in each of: Northern Counties Products; Nestle UK administration; Northern Counties Meats; SQBLA.

- 1.12 For what proportion of qualifying finished cattle do you receive the second premium? (74 ± 40) % (24 responses 35% of sample)
- **1.13** The grazing livestock enterprises which contribute most to my farm profits, under normal circumstances, are:

Please tick one or more box or specify other. (% responses:

All	Breeding	Breeding	Store	Store	Finished	Finished	Other
Stock	Cattle	Sheep	Cattle	Sheep	Cattle	Sheep	(specify)
12	26	40	28	21	29	46	9 (dairy)

1.14 The grazing livestock enterprise(s) from which I get most personal satisfaction are:

Please tick one or more box or specify other. (% responses:

All Stock	Breeding Cattle	Breeding Sheep	Store Cattle	Store Sheep	Finished Cattle	Finished Sheep	Other (specify)
22	29	35	12	3	21	26	3 (dairy)

1.15 Approximately how many hours do you and your farm staff spend per year (e.g. per sale times number of sales per year) in selling all types of livestock (both cattle and sheep), according to the following marketing channels that you use?

Enter the number of hours per year in each relevant box. Leave boxes with no hours blank.

Marketing Channel Response	Rate:	Preparation of stock for sale (inc. preparation of records etc.)	Assembly and Loading	Transport of stock to sale	Travel to market & Selling time
Regular Auction Marts	68%	66 (±64)	21 (±26)	24 (±19)	61 (±57)
Specialist/Breed auction marts	29%	58 (±54)	6 (±4.5)	10 (±5.8)	39 (±38)
Electronic Auction	10%	53 (±26)	13 (±6.5)		104 (±12.6)
Abattoir	4%	40 (±12)	14 (±3.4)		
Direct to Butcher	3%	15 (±3)	7 (±1.6)	8 (±1.6)	8 (±1.6)
Co-operative/Marketing Group					
Other (please specify)					

1.16 Please indicate the **approximate number** of each type of **cattle** you sold through each of the following marketing channels in the last financial year.

Enter the number of cattle in each relevant box. Leave boxes with no cattle blank.

Marketing Channel		Finishe	d	Store		Calves	Breeding Animals	Cull Animals	
	Heifer	Steer	Bull	Heifer	Steer	Bull			
Nearest auction mart	31 ± 22	27 ± 14	43±18	19±12	21±13	1±1	4 ± 0.7	7 ± 2.6	11±11
Othcal auction marts	21±11	36 ± 28	33±13	29 ± 15	28 ± 15	8 ± 1	4 ± 0.8	4±1	12±5
Specialist/Breed marts				7 ± 1	7 ± 1		32 ± 15	33 ± 6.3	
Electronic Auction	58±11	12±2					20 ± 2		
Abattoir	20 ± 4	52±13							17±5
Direct to Butcher	19±6	1							
Co-operative/Marketing Group			45±5						14±1.7
Dealer							66±8		6±1.6
Private Sale (lw)				16±1				13 ± 3.7	
Other (please specify) (Private dw):	109±2	25±5							
Approx. Response Rate		25%			34%		16%	7%	35%
Are these sales typically:			<	Т	iming of	Sales	>		
Evenly spread throughout year? Please tick if appropriate									
Concentrated in months: (Jan = 1, Dec = 12)? Please print a number/s to indicate month/s									

1.17 Please indicate the **approximate number** of each type of **sheep** you sold through each marketing channel in the last financial year.

Eenter the number of sheep in each relevant box. Leave boxes with no sheep blank.

Marketing Channel	Finished lambs	Store lambs	Shearlings & ewe lambs	Draft Breed'g Ewes	Cull Animals
Nearest auction mart	393±383	210±117	204+147	117±73	57±75
Other local auction marts	387 ± 233	289±112	52±19	73±26	43±23
Specialist/Breed auction marts		500±60	166±65	104±32	5±0.6
Electronic Auction	666±265				
Abattoir	152±44				
Direct to Butcher	220±27				11±1.3
Co-operative/Marketing Group	350±60	120±14			
Dealer					50±10
Private Sale (lw)		249±61	2028±679		128±15
Other (please specify)	275±33 ("BLE")		(inc. 1 large sale of 5590)		
Approx. Response rate:	57%	19%	24%	25%	54%
Are these sales typically:	<	Timiı	ng of Sales	>	
Evenly spread throughout year?					
Please tick if appropriate					
Concentrated in months: (Jan =1,					
Dec =12)? Please print a					
number/s to indicate month/s					

Section 2: Your Marketing Decisions and Preferences:

FOR ALL OF THE FOLLOWING QUESTIONS PLEASE ONLY COMPLETE THE SHADED COLUMNS WHEN THE RANKING OR SCORE IS DIFFERENT FROM THE "ALL STOCK" COLUMN

2.1 How important are the following factors in determining the **timing** of your livestock sales?

Most

Important

Important

Importance

1

2

3

4

Print a number between 1 and 5 in each relevant box. Leave irrelevant boxes blank.

Considerations in TIMING of sales	All	Breeding	Store	Store	Finished	Finished
% response for All Stock	Stock	Stock	Cattle	Sheep	Cattle	Sheep
Cash flow or financial considerations 46%	3 ±1.8					
Stock weight and/or age 46%	2 ±0.9				2 ±0.7	2 ±1.0
Stock quality and finish 49%	1 ±0.7				1 ±0.7	2 ±1.1
Headage or subsidy payment compliance 44%	2 ±1.5				2 ±0.8	
Expected market prices 44%	2 ±1.3				2 ±0.7	2 ±1.0
Co-op or marketing group requirements 22%	5 ±2.0					
Buyers' requirements 37%	2 ±1.4					2 ±0.8
Tradition or habit 41%	3 ±1.9					3 ±1.2
Expected strength of market (e.g. no. of potential	2 ±1.4					2 ±0.9
buyers) 43%						
Seasonality of available sales or specialist markets	3 ±1.7					
34%						
Other factors (please specify)						
Note: livestock type responses only recorded for cells with >10% response rate						

2.2 What are your **favourite market outlets**? Please rank the following types of outlet according to your preferences for each type of stock. **Leave irrelevant boxes blank**.

Best 2nd. best Acceptable Poor Worst 1 2 3 4 5

Market Outlet % response rate (All	Stock):	All Stock	Breeding stock	Store Cattle	Store Sheep	Finished Cattle	Finished Sheep
Regular Live auction	71%	1 ±0.7					
Specialist or Breed specific auction	15%	2 ±0.7					
Electronic Auction	16%	3 ±1.3					
Deadweight sale to abattoir	18%	3 ±1.1					
Sale through coop or marketing group	9%	3 ±0.9					
Forward Contract to buying agency or larg concern	ge 7%	4 ±1.0					
Direct sale (e.g. to local butcher or known or user)	finisher 9%	2 ±0.6					
Other (Please Specify) (private sales)	1						

2.3 How good is the performance of your actual and potential market outlets?

Please **Score the performance** of up to four market outlets which you either currently use or with which you have some experience or which you have seriously considered using.

If you do not consider <u>auction marts</u> or <u>electronic auctions</u> applicable to you, please strike these out and specify other outlets more relevant to your business.

Very Good Fair Very Poor 1 2 3 4 5

Print a performance score of between 1 and 5 for each statement. Leave blank if not applicable.

Prini a performance score of between 1 and 5	V	Auction Mart	Electronic	Preferred Outlet:
	response rate	or specify:	Auction	(Specify)
	(% response to	or specify.	or specify:	(Speedy)
Market Outlet Performance on:	Auction Mart	Mean Score	<20%	(see Below)
	Column)	± sd	response	
			rate	+
Reliability of returns relative to alternatives	82	2 +1.1	2 ±1.0	
The opportunity to meet other farmers	85	2 ±1.0	5 ±1.7	
Complementary to other business activities	66	3 ±1.5	3 ±1.2	
Complementary to personal/leisure activities	60	3 ±1.9	4 ±1.5	
Convenience in scarce time and effort	66	3 ±1.8	2 +0.6	
Reliability of stock specification and grading	63	2 ±1.3	3 ±1.1	
Provision of good marketing service	78	2 ±1.1	2 ±0.7	
Time spent travelling and selling	75	3 ±1.5	1 ± 0.4	
Lack of Penalties	66	2 ±1.2	2 ± 1.1	
Better Animal Welfare	69	2 ±1.2	2 ± 1.0	
Support the local community	76	2 ±1.1	4 ± 1.4	
Competitive Commissions and selling charges	76	3 ±1.4	2 ± 0.8	
Lower Transport costs	66	2 +1.4	2 ± 0.9	
Commitment and trustworthiness of buyers	69	2 ±1.5	2 ± 0.9	
Limited risk of default	78	2 ±1.0	2 ± 0.9	
Meeting and knowing buyers	85	2 ±1.0	4 ± 1.6	
Quick settlement of accounts owing	88	1 ±0.6	2 ± 1.0	
Signals good/reliable quality to buyers	68	2 ±1.2	2 ± 0.7	
Others (please specify) no response				

Note: Only 9 responses specified a preferred outlet to either Auction or Electronic: 1 specified a specific named mart; 3 prefer deadweight sales via abattoir; 2 prefer marketing coops; 1 prefers direct sales to farmers (breeding stock), 1 prefers sales to private butcher; 1 prefers specialist auctions.

Section 3: Your Management and Marketing Characteristics

3.1 Please indicate the extent to which you **agree or disagree** with the following statements as they apply to the management of your farm business:

Strongly
Agree
nor disagree
Disagree
1 2 3 4 5

Management statements Print a number between 1 and 5 in every	Response	Mean
box.	Rate (%)	Score (±sd)
Maximising farm profits is my most important farming goal	93	2 ±0.9
My principle long term goal is to increase the size of my business	93	3 ±1.8
The size of my business is less important than becoming better at what I do	91	2 ±1.3
Passing on my farm in a healthy state to my successors is a vital business goal	94	2 ±1.3
I get satisfaction from farming which outweighs some loss in income and returns	94	2 ±1.4
Long term survival of my business is more important than short-term profits	97	2 ±0.9
Personal relationships with my suppliers and buyers are very important to me	97	2 ±0.9
General public perceptions about my farm and business are important to its success	91	3 ±1.3
If an enterprise doesn't make money as part of the farm business, it is not worth doing	91	2 ±1.3
I am running my business so that I can afford to retire as soon and as well as possible	91	3 ±1.5
My business will not be worth doing if I cannot afford to keep livestock	96	2 ±1.3
I think production and sales decisions are inseparable - they have to be taken together.	88	2 ±1.1
I go on farming because the way of life is important to me and my family	96	2 ±1.0
Producing high quality stock, regardless of the market, is important to me	96	2 ±1.0
Ideally, I would like to change farms so that I can reduce my dependence on livestock	90	4 +1.6
I spend time and money improving the appearance and attractiveness of my farm	93	2 ±1.0
What my non-farming neighbours think about my business is important to me	88	3 ±1.6
I rely a lot on other farmers experiences in making my farming decisions	91	3 ±1.4
I think of my farm partly as a public asset, to be preserved and enhanced for the general good	91	3 ±1.4
I like to plan my business by working out problems in my head before trying them in practice	93	2 ±0.9
I rely heavily on instinct and judgement rather than careful research and analysis	93	2 ±1.3
I see myself as farming leader and entrepreneur in the way I manage my farm	90	3 ±1.4
My farm-business success depends on understanding the needs of the final consumers	90	2 ±1.1
I frequently go to markets even when I have nothing to buy or sell	91	4 ±1.6
Practical farming is more important to me than office and book work	91	2 ±1.4
If I wanted to be rich, I would do something else than farm	94	2 ±1.2

3.2 Do you agree or disagree with the following statements about marketing?

Strongly		Neither		Strongly
Agree		Agree nor		Disagree
		disagree		
1	2	3	4	5

Marketing statements <i>Print a number between 1 and 5 in every box.</i>	Response Rate %	Mean Score ±sd
I have stable sales arrangements that I know are best suited to me and my business	94	2 ±1.1
My production requires specialist knowledge/skill that other farmers do not have	96	3 ±1.3
I calculate the specific costs and returns associated with each potential marketing outlet	93	3 ±1.3
I continually monitor market information, other than price, to plan my sales decisions	90	3 ±1.3
I maintain good relationships by dealing with a small number of agents or market outlets	93	2 ±1.2
Selling what I produce best is more important than producing for specific outlets	94	2 ±1.2
My marketing practices involve a high degree of trust with my buyers and agents	91	2 ±1.2
My reputation as a stock manager is important in marketing my stock	96	2 ±1.0
My business viability depends on my regular review of marketing opportunities	90	2 ±1.2
I would prefer to sell privately and directly from my farm (to users or agents), if I could	90	4 ±1.6
I deliberately choose market outlets where the quality of my stock will be best appreciated	94	2 ±1.0
I try to produce stock which best meets long term market requirements	93	2 ±1.0
I pick my market outlets more by intuition & judgement than by research and experiment	91	3 ±1.4
I switch the marketing channels I use when the price is higher at one outlet than another	91	3 ±1.5
I see no real advantage in joining farm assured schemes	91	3 ±1.6
I need to be farm assured to sell through some of the marketing channels I use	91	3 ±1.7
I use a mix of marketing outlets to spread risk	87	3 ±1.6
I use a mix of marketing outlets because my preferred outlet cannot take all I produce	90	4 ±1.7
I use a single market outlet (per product type) to minimise costs and/or effort	90	3 ±1.5
I continually monitor market prices to determine the timing and outlets for sales	90	2 ±1.3
I use specific techniques to gain the highest possible quality premiums for my products	87	2 ±1.4
I try to differentiate my produce from that produced by other farmers	88	3 ±1.4
I continually try to meet market requirements by changing my stock grades & specifications	90	3 ±1.4
My main competitors are a small number of other specialised producers	87	3 ±1.6
I actively search for new market outlets and new ways of satisfying my buyers	87	4 ±1.6
The reputation of the markets I use are important in maintaining my returns	93	2 ±1.0
I have no influence over the price I receive for my products	91	3 ±1.5
It is important to me to know who is buying my stock and how satisfied they are	96	2 ±1.0
I use different market outlets to sell low and high quality stock	90	3 ±1.6
If my stock do not receive their reserve price, I will take them home	93	2 ±1.2
I continually search for new production systems and products to meet market demands	88	3 ±1.5

Section 4. Information Sources, Needs and Requirements:

4.1 Please indicate the relative importance of the **information sources** you use to make decisions about your market outlets and the timing of sales?

Most		Moderately		No
Important		Important		Importance
1	2	3	4	5

Print a number between 1 and 5 in each relevant box. Leave blank if not applicable.

Professional farm advisor	53%	4 ±2.3	Other farmers	78%	3 ±1.5
Telex or Teletext	65%	4 ±2.0	Television programs	56%	4 ±2.2
Auction market sales	88%	2 ±1.0	Bank manager	59%	4 ±2.2
Agents (abbatoirs, electronic mart)	56%	4 ±2.1	Family members & Business partners	69%	2 ±1.6
Auctioneer	78%	2 ±1.3	My Farm & Business Records	69%	2 ±1.6
Farm Press & Magazines	84%	2 ±1.3	Farmer group meetings	65%	4 ±2.0
Radio	57%	3 ±1.0	My accountant	65%	4 ±2.0
NFU	69%	4 ±2.0	National Newspapers/Magazines	62%	3 ±2.0
Marketing Group or Coop	51%	4 ±2.3	MLC	60%	4 ±2.2
Other (please specify)			Other (please specify)	_	

4.2 How **important** are the following factors to your **marketing decisions**?

	1	6		
Most		Moderately		No
Important		Important		Importance
1	2	3	4	5

Please print a number between 1 and 5 in each relevant box. Specify any other missing factors in the spaces provided. Leave blank if not applicable.

~	f	r	F				
1	Production costs	79%	2 ±1.4	11	Quality discounts and premiums	60%	3 ±1.7
2	Market prices & returns	85%	1 ± 1.0	12	Consumer purchasing patterns	53%	3 ± 1.8
3	Subsidy levels	81%	2 ± 1.3	13	Total supplies to my markets	53%	3 ±1.6
4	Feed prices	82%	2 ± 1.3	14	My Business Financial position	65%	2 ±1.6
5	Alternative market opportunities	57%	3 ± 1.8	15	Marketing costs and commissions	69%	2 ± 1.5
6	Market trends and forecasts	66%	2 ± 1.5	16	Buyer confidence and commitments	62%	2 ± 1.4
7	Links with retailers & consumers	51%	3 ± 2.0	17	Reputation of market outlet	72%	2 ± 1.3
8	Reputation of product or stock	69%	2 ± 1.5	18	Traceability of products and stock	62%	2 ±1.6
9	Reliability of payment	88%	2 ± 1.1	19	Lack of comebacks or penalties	56%	3 ±1.6
10	Other (specify)			20	Other (specify)		

4.3 How good or bad is your **information** for the factors which you think are important?

Please write the numbers of up to five factors from question 4.2 in the following boxes, according to your judgement about the quality of your information: Most common factor (# responses)

My information on the following factors is **good or very good**: 2 (34) 3 (27) 4 (23) 1 (21) 9 (16)

My information on the following factors is **poor or very poor**: 7 (24) 5 (19) 12 (19) 13 (12) 16 (12)

Section 5: Marketing Costs & Returns (Please note that we only need approximate answers in this section)

5.1 I reckon that the **direct costs** (commissions, haulage, lairage, MLC levies etc.) I incur in selling my stock amount to **approximately** the following percentages of the normal selling price: (indicate the range of costs if you use more than one outlet with different costs for the same type of stock): [54% to 32% respnse rate for this question]

Store Cattle $4 \pm 2.4\%$; Store Sheep $4 \pm 2.2\%$; Finished cattle_5 $\pm 2.5\%$

Finished Sheep $_5 \pm 2.7\%$; Breeding stock $_5 \pm 3.6\%$

5.2 Compared with these direct costs, I reckon that **indirect costs** of marketing my livestock (labour and management time and effort etc.) are: (% **responses in each cell**)

Please tick one box, or enter your estimate of indirect costs as a proportion of direct costs.

	much lower (<50%)	lower (50 - 90%)	the same (90 - 110%)	higher (110 - 180%)	much higher (>180%)
Cattle	24	13	10	3	3
Sheep	22	12	13	3	4

5.3 I think I get better than average market returns for my stock because of the way I market them.

If Yes, what **specific marketing practices** do you use to improve your returns?: **classification and no. of responses:** .

Presentation of stock: 5; Timliness & Outlet choice: 6; Quality & Presentation: 6; Match product to buyer: 4; Quality & Outlet choice: 1; nil response: 4.

.....

I reckon that my marketing practices **add** about the following **approximate** percentages of the selling prices of my stock compared with the market averages for this class of stock (*show ranges if this is appropriate*): **Response rate** (%); **mean response**; ±sd.

Store Cattle: $\underline{15\%: 7\pm2.7\%}$ Store Sheep $\underline{12\%: 5\pm1.8\%}$ Finished cattle $\underline{16\%: 5\pm2.2\%}$

Finished Sheep 15%: 6 ±3.0% Breeding stock: 13%: 11±4.4%

8.5 Response rate (%); mean response; ±sd.
I currently sell 3%: 35±6.2% of my sheep and 1% 25±0% of my cattle through forward contracts. (genuine & solid commitments to supply at some future date(s), with or without prefixed price)

Section 6: Future Marketing Expectations

6.1	If you or your successors do NOT expect to be farming in 5 yrs. please tick here:	6
	and go to question 6.2	(9%)

How do you expect you will be using the following marketing outlets in five years time, given that what you might like to do will be dependent on the outlets being actually available to you by then?

Please tick the appropriate box(s) for each marketing channel.

(% responses in each cell:

Marketing Outlets	I would like to use More often	I will be able to use More often	The Same as now	I will have to use Less often	I would like to use Less often
Closest auction market	9		59	4	6
Other local auction markets	1	3	57	1	1
Specialist or breed auction mark	cets 6	3	31	1	
Electronic Auction	3	6	10	1	1
Abattoir	4	3	10		4
Direct to Butcher	9		6		4
Co-operative/ Marketing Group	1	6	10		3
Dealer			13	1	4
Private Sale direct from farm (ly	w) 7	4	6	4	1
Other (please specify)					
					

6.2 If you produce specialist or niche stock or further process or add value to your produce, please give brief details:

Pedigree Breeding stock or Specialist Breeds (5 of 68 responses).

6.3 Do you or your successors anticipate extending your business in the next five years to include specialist or niche marketing of your stock, or towards further processing and added-value? Please tick one box only.

Yes 7 (10%)

No 49 (72%)

If **yes**, can you indicate briefly what these possibilities include?

Direct sales to retail (2); Improve Pedigree (1); Organic/env. freindly (1); change farms (1); nil response (2)

What levels of education do you have? *Please tick all boxes which apply to you.* 6.4

			11 2	
Degree	OND/HND/NDA	City & Guilds/NVQ	A levels	Secondary School
9%	21%	22%	16%	56%

THANK YOU VERY MUCH INDEED FOR SPENDING TIME COMPLETING THIS **QUESTIONNAIRE - WE HOPE YOU HAVE FOUND IT INTERESTING.** WE WILL CERTAINLY FIND IT USEFUL.