

SUMMARY OF RESPONSES

Section 1: Your Farm and Your Market Outlets

[68 returns from 173 distributed, with 4 returns providing unusable responses]

Please complete the following statements

Responses shown as: totals or as mean (± s.d), as appropriate

1.1 I am the owner and/or the manager of this farm business (*please tick appropriate boxes*) [
Owner of the farm business **Manager of the farm business**
 {3 nil responses}

1.2 I have held managerial responsibility for **23 (±14.1)** years

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 **No**
 {4 nil responses}

If **Yes**, Please specify the type of concern(s) and the type of interest

Shareholder or director in auctionmart 7; Marketing Coop shareholder 1;

Processing company shareholder 1.

1.4 I hold positions of responsibility (for example, chairman, secretary or director) with:

Tick any or all that apply. [Number of responses from 68 returns]

marketing co-operative?	<input type="text" value="1"/>	farmer organisation?	<input type="text" value="7"/>
marketing company (auction mart etc.)?	<input type="text"/>	farm transport concern?	<input type="text"/>
non-farm/food business?	<input type="text" value="1"/>	processing or retailing concern?	<input type="text"/>
charitable organisation	<input type="text" value="3"/>	public body or authority	<input type="text"/>

1.5 I live approximately **9 (±6.7)** miles from my nearest auction mart.

1.6 Within 20 miles of my home farm there are (no. of marts - tick appropriate box):

	less than 3	3 to 6	7 to 10	more than 10
% of responses:	40	51	3	7

1.7 I used **2 (±1.4)** (number of) different **market outlets and/or auction marts** to sell **sheep** (*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 (±3.6)** times and **6 (±6.4)** times per month.

1.10 On average (over all visits during the year), I spend about **42 (±93)** hrs. at the mart, and I take between **2 (± 4.6)** hrs. and **3 (±6.4)** hrs. getting there and back.

Appendix 1: Survey of Livestock Marketing Channels & Marketing Practices, 1998/9

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

Please tick one box only.

Yes **56%** 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.

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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 Stock	Breeding Cattle	Breeding Sheep	Store Cattle	Store Sheep	Finished Cattle	Finished Sheep	Other (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)					

Appendix 1: Survey of Livestock Marketing Channels & Marketing Practices, 1998/9

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	Finished			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±1.1
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: <-----Timing 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.

Enter 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: <-----Timing 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					

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

Strongly Agree	2	Neither Agree nor disagree	4	Strongly Disagree			
1		3					
Marketing statements	<i>Print a number between 1 and 5 in every box.</i>					Response Rate %	Mean Score \pm sd
I have stable sales arrangements that I know are best suited to me and my business					94	2 \pm 1.1	
My production requires specialist knowledge/skill that other farmers do not have					96	3 \pm 1.3	
I calculate the specific costs and returns associated with each potential marketing outlet					93	3 \pm 1.3	
I continually monitor market information, <u>other than price</u> , to plan my sales decisions					90	3 \pm 1.3	
I maintain good relationships by dealing with a small number of agents or market outlets					93	2 \pm 1.2	
Selling what I produce best is more important than producing for specific outlets					94	2 \pm 1.2	
My marketing practices involve a high degree of trust with my buyers and agents					91	2 \pm 1.2	
My reputation as a stock manager is important in marketing my stock					96	2 \pm 1.0	
My business viability depends on my regular review of marketing opportunities					90	2 \pm 1.2	
I would prefer to sell privately and directly from my farm (to users or agents), if I could					90	4 \pm 1.6	
I deliberately choose market outlets where the quality of my stock will be best appreciated					94	2 \pm 1.0	
I try to produce stock which best meets long term market requirements					93	2 \pm 1.0	
I pick my market outlets more by intuition & judgement than by research and experiment					91	3 \pm 1.4	
I switch the marketing channels I use when the price is higher at one outlet than another					91	3 \pm 1.5	
I see no real advantage in joining farm assured schemes					91	3 \pm 1.6	
I need to be farm assured to sell through some of the marketing channels I use					91	3 \pm 1.7	
I use a mix of marketing outlets to spread risk					87	3 \pm 1.6	
I use a mix of marketing outlets because my preferred outlet cannot take all I produce					90	4 \pm 1.7	
I use a single market outlet (per product type) to minimise costs and/or effort					90	3 \pm 1.5	
I continually monitor market prices to determine the timing and outlets for sales					90	2 \pm 1.3	
I use specific techniques to gain the highest possible quality premiums for my products					87	2 \pm 1.4	
I try to differentiate my produce from that produced by other farmers					88	3 \pm 1.4	
I continually try to meet market requirements by changing my stock grades & specifications					90	3 \pm 1.4	
My main competitors are a small number of other specialised producers					87	3 \pm 1.6	
I actively search for new market outlets and new ways of satisfying my buyers					87	4 \pm 1.6	
The reputation of the markets I use are important in maintaining my returns					93	2 \pm 1.0	
I have no influence over the price I receive for my products					91	3 \pm 1.5	
It is important to me to know who is buying my stock and how satisfied they are					96	2 \pm 1.0	
I use different market outlets to sell low and high quality stock					90	3 \pm 1.6	
If my stock do not receive their reserve price, I will take them home					93	2 \pm 1.2	
I continually search for new production systems and products to meet market demands					88	3 \pm 1.5	

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% response rate for this question]**

Store Cattle 4 ±2.4% ; Store Sheep 4 ±2.2% ; Finished cattle 5 ±2.5%
 Finished Sheep 5 ±2.7% ; Breeding stock 5 ±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.

Please tick one box only. [**no. & % responses**]:

Yes 26 (38%) No 33 (49%)

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.

5.4 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: **15%: 7±2.7 %** Store Sheep **12%: 5 ±1.8%** Finished cattle **16%: 5 ±2.2 %**

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

5.5 **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 pre-fixed 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 (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 markets	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 (lw)	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).

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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)

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

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.