



METAMORPHOSIS

Final Report: NSW South Coast Calf-pathways

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Pollinate



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1

Executive Summary

Executive Summary

The project successfully:

- Identified multiple pathways for surplus calves on the South Coast
- Formed relationships resulting in project development
- Developed a roadmap for how to effectively engage dairy farmers in co-creation with multi-stakeholders
- Identified insights from consumers and supply chain that enabled a reframe and shift in mindset for both farmers and consumers
- Proved that it's possible to build trust across different stakeholder groups using a co-design approach

Report Overview

The South Coast Surplus Calf Project ran from October 2020 to October 2022. This timeline was extended by almost 12 months due to a combination of factors including COVID and repeated flooding on the South Coast.

This report provides an overview of the project approach, results and learnings.

The report then provides a high-level summary of each phase of the project. The full reports from each stage of engagement can be accessed via the below links.

- Regional Group 1
- Consumer Group
- Regional Group 2
- Stakeholder engagement
- Regional Group 3
- Regional Group 4

Key farmer insights

Economics dominates

See a power imbalance with processors / retailers having all the power

Sharing consumer perspective with farmers broke down the 'us' vs. 'them' mentality, motivating them to listen and align with consumers

Not in the right headspace to feel motivated

Solutions felt to have high input of time and capital, when they already feel constrained by time

A lack of 'proof' further fuels hesitancy

Sense they're risking more than what they will gain

BUT They want to be involved in finding a viable solution!





Key consumer insights

Generally unaware, but not surprised

Don't see farmers as the bad guys

View farmers as victims of the food system

Consumer guilt, not animal welfare is the real issue...



Key supply chain insights

Universal acceptance of significant risk

Farmers need to understand what the market wants

Gap is closing to address the issue

Circular economy opportunity to create value out of a current 'waste product'

Prejudice to dairy changing at processor/retailer but challenges remain

Ultimately, farmers need “sideways support” – build capability nor dependency.

Most farmers lack the capacity to easily invest in change. Their time is short, every day is busy, money is tight, innovation exposed knowledge and skills gaps. **The rest of the supply chain needs to invest/build capacity.**

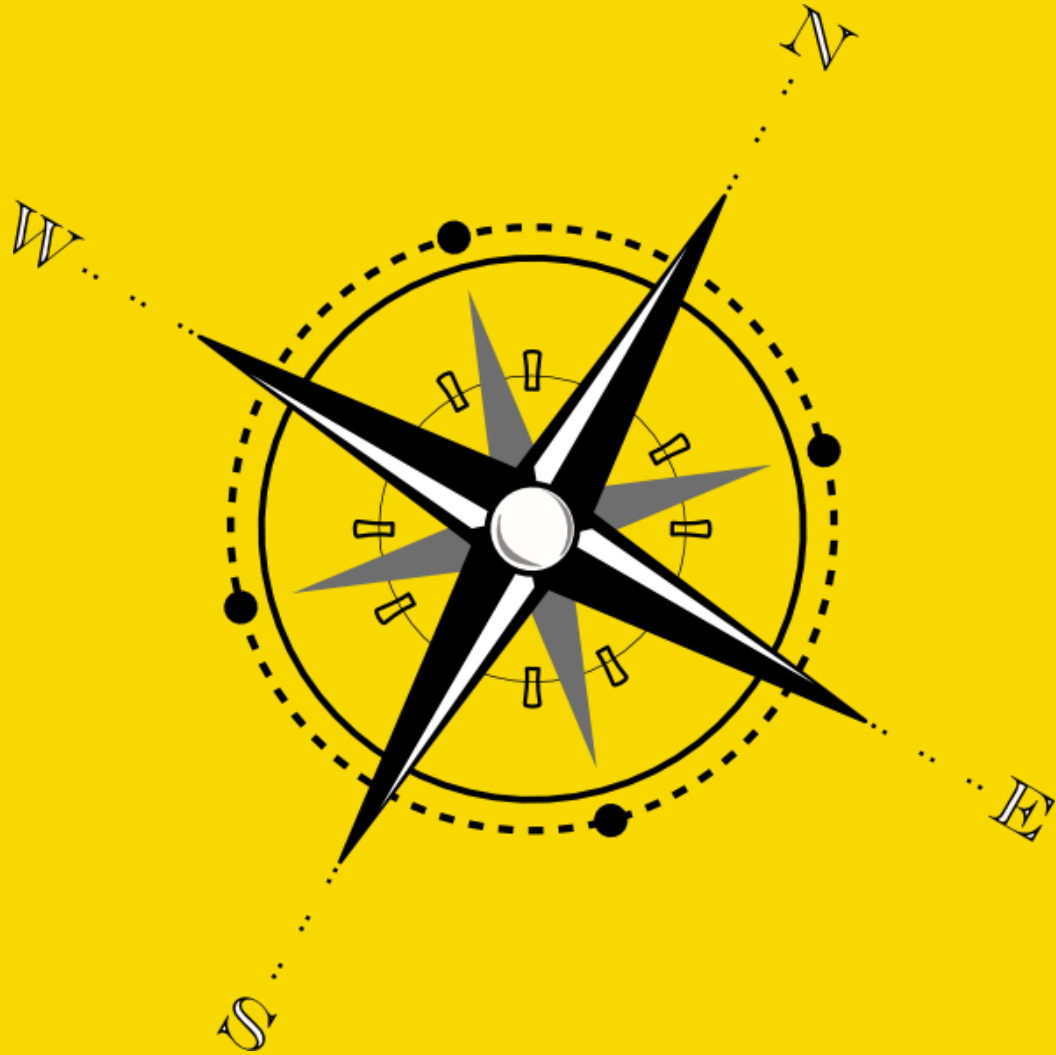
There is no guarantee of support, reward or return. So, why would farmers take the risk? Even if they had ‘spare’ capacity, there is no certainty which makes it impossible to calculate the risk. **Farmers needed support/certainty to invest in becoming better farmers.**

In conclusion

Farmers needed “sideways support” to kick start solutions/s and help make farmers even better at what they do.

1

Project Approach



Project Purpose

Socially and economically sustainable pathways for surplus calves

Solutions that:

- Are tailored to the local region
- Can address multiple challenges simultaneously (profitability, welfare, environment, labour etc.)
- Speak directly to change in the commercial environment

Project Objectives

- To support the exchange of local information, unpack the complexity of the non replacement dairy calf (NRDC) challenge at a local level, identify knowledge gaps and develop local projects (e.g. supply chains) that aim to reduce bobby calf processing and at birth euthanasia
- To provide a mechanism for guiding the delivery of NRDC-related research & extension based on local needs
- To facilitate co-ownership of the approach to NRDC management between the beef and dairy sectors
- To reconcile values misalignment between industry and community by designing and refining through inclusion of the community voice in the process to arrive at a stated goal/vision for NRDC that is supported by society

Untangling a wicked or complex problem

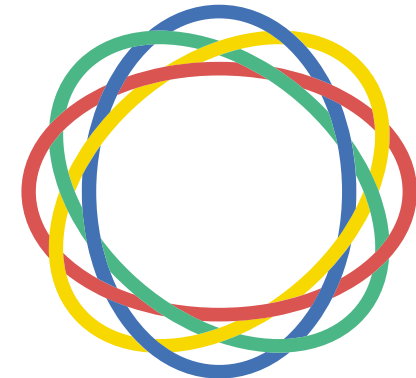
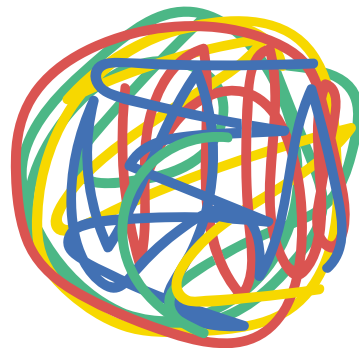
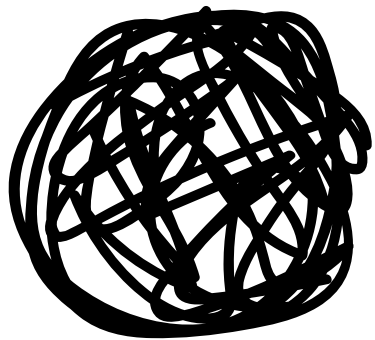
Many stakeholders

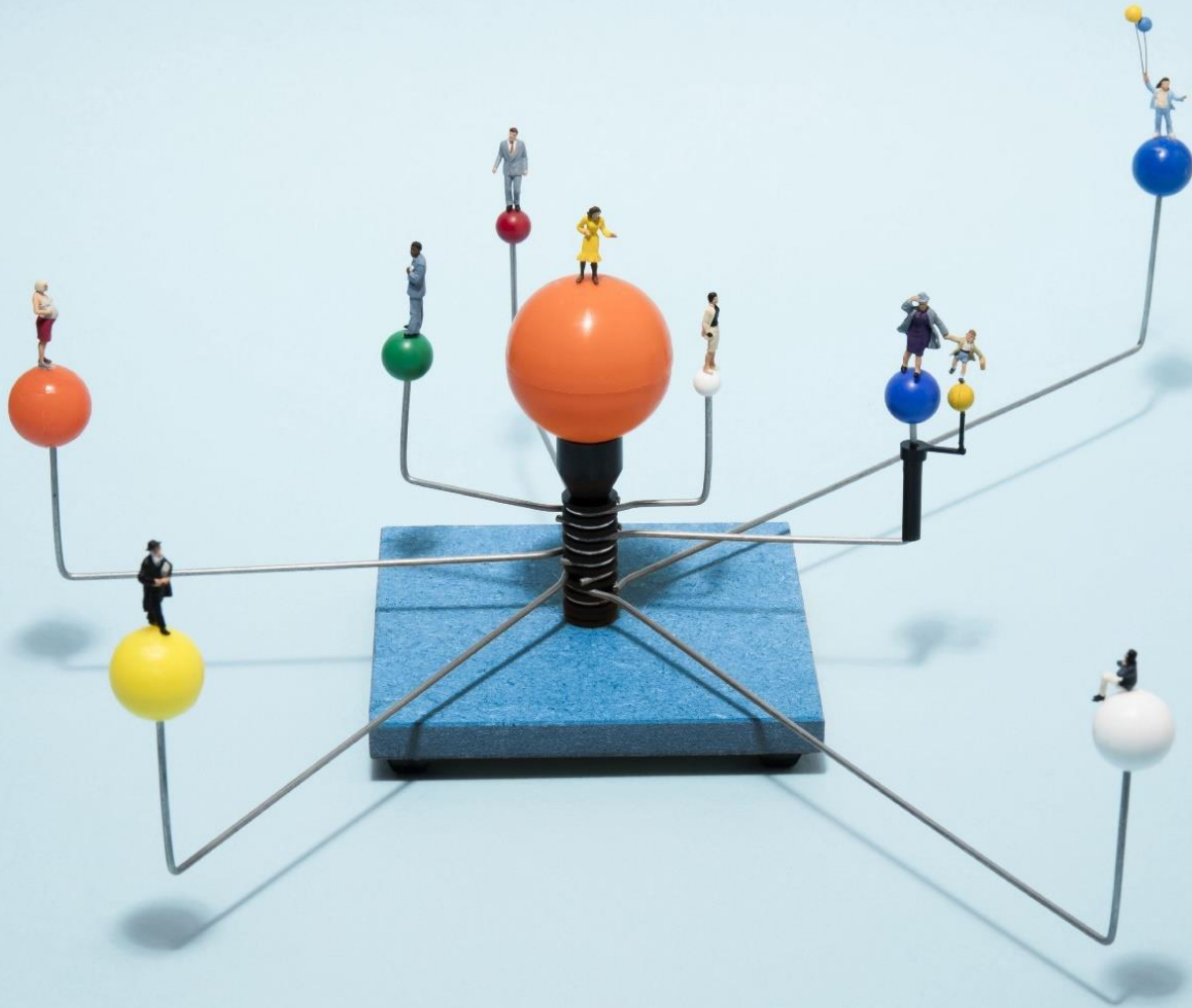
Often multi-causal with
evolving driving forces

Involve behavior change

Socially complex

Science and evidence alone
won't solve it





Project designed following deliberative democracy principles

The idea that democratic legitimacy depends on the ability of those subject to (or affected by) collective decisions to participate (or be represented in) consequential deliberation about those decisions

*Paraphrased from Dryzek
2010*

Where deliberation enables,

“Debate and discussion aimed at producing reasonable, well-informed opinions in which participants are willing to revise preferences in light of discussion, new information, and claims made by fellow participants”

Chambers 2003

To ensure success, principals of communication in complex dynamic systems were employed

- 1** Work with communications specialists & social scientists
- 2** Use plain language
- 3** Apply anchors, framing, analogies, simulations

Paraphrased from Sterman 2008

The overall set of guiding principals employed throughout the project:

Within the system

It was important to define the boundaries of the system

Cognitive science

Employed a full range of cognitive science, policy and strategic tools

Able to participate

Inclusion and education was key to success

Open-mindedness

Participants has to be willing to empathise with conflicting views (and willing to listen)

Also, included of creative thinkers

Methodology, sample and facilitation followed these guidelines for success

Importantly all voices were included in the process

Regional groups

12 dairy farmers – range of farm sizes and current calf management practices

12 pre-farm gate advisors

- RSPCA
- DPI NSW
- Meat & Livestock Australia (welfare and MSA)
- Dairy consultants
- Veterinarian
- Academics

Consumer groups

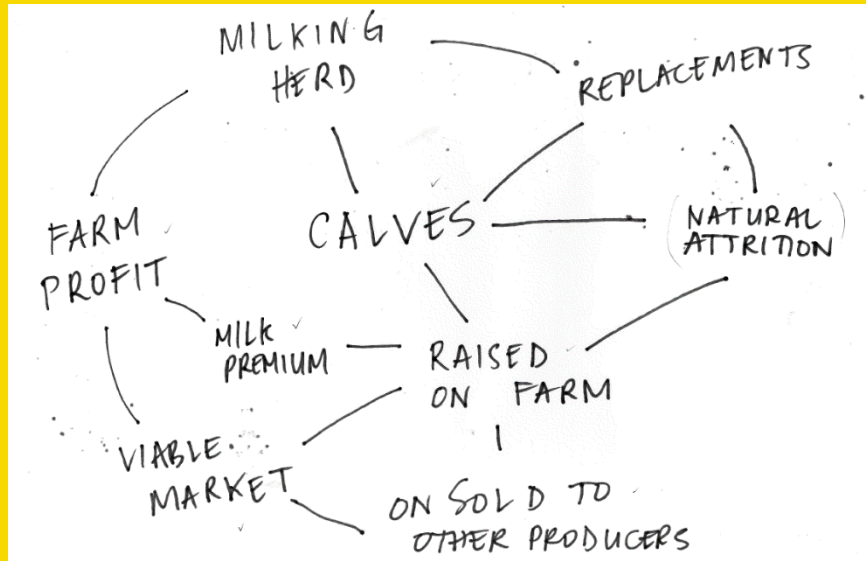
24 consumers from Wollongong (closest regional city to the South Coast)

- Mix of demographics: Life stage, income and age
- Mix of attitudes towards dairy, environment, social and economic issues
- Mix of frequency of eating dairy spread across groups
- 4 x vegan
- 3 x vegetarian
- 3 x connected to world of dairy
- All open to or reducing dairy consumption

Supply chain

In-depth interviews with post-farm gate supply chain members:

- Retailers
- Meat processors
- Dairy processors
- Genetics companies



A range of tools were employed

Systems mapping

Group workshops

Small group activities

1:1 interviews

Online workshops

Online polls

Consumer focus groups

Creative stimulus



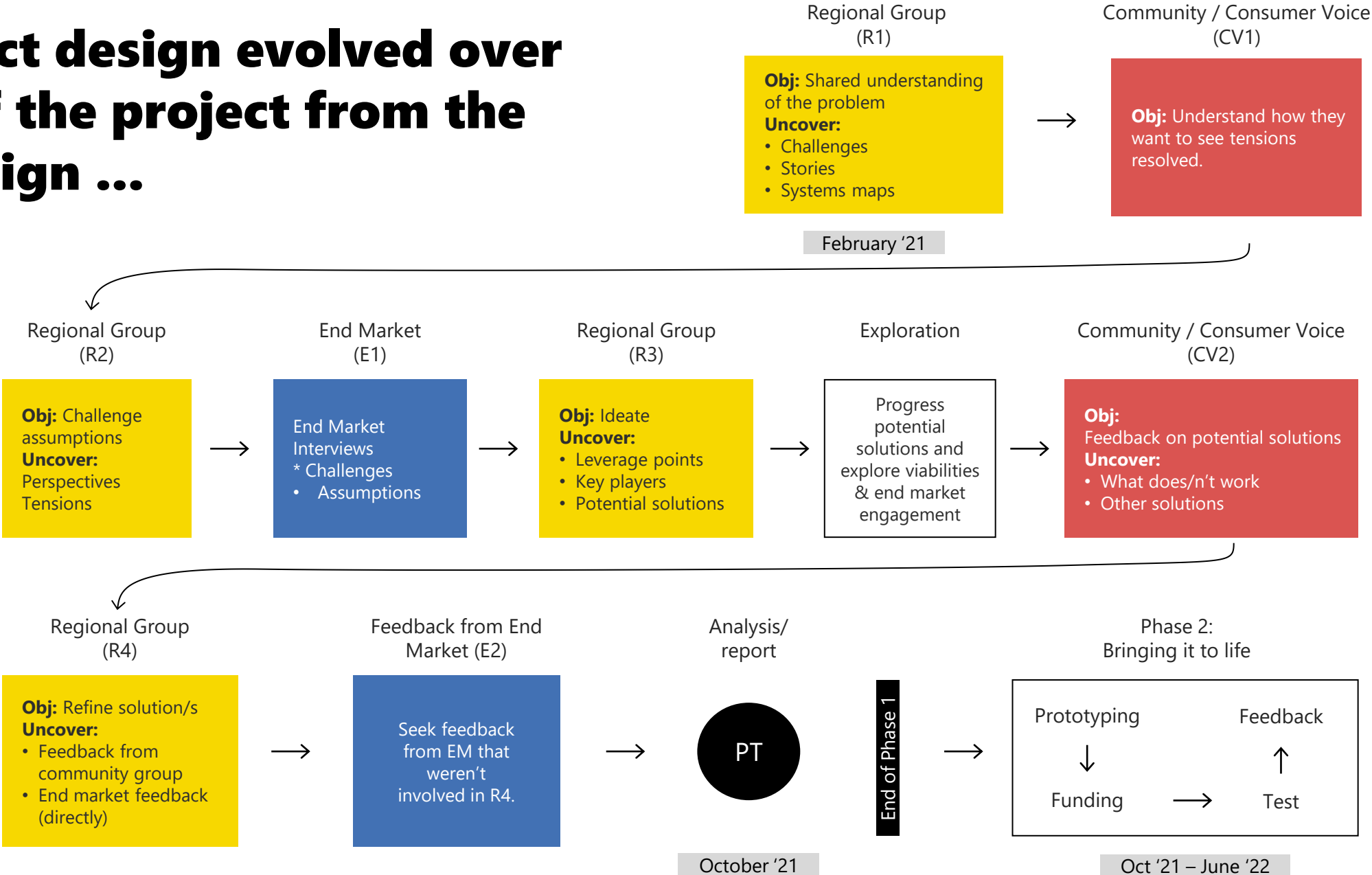
2.1

Evolution of the Process

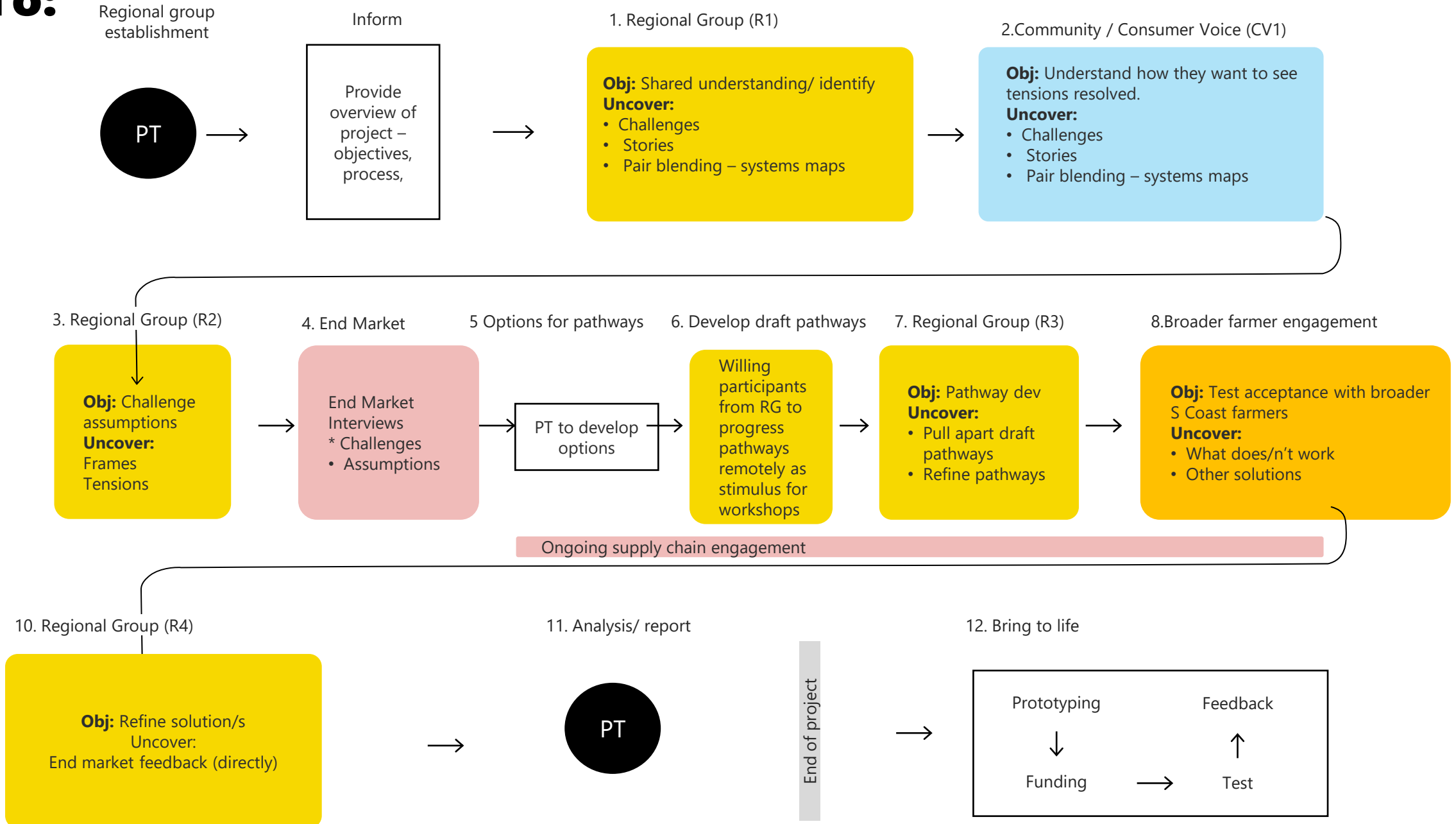
The project design evolved over the life of the project from the initial design ...

Key

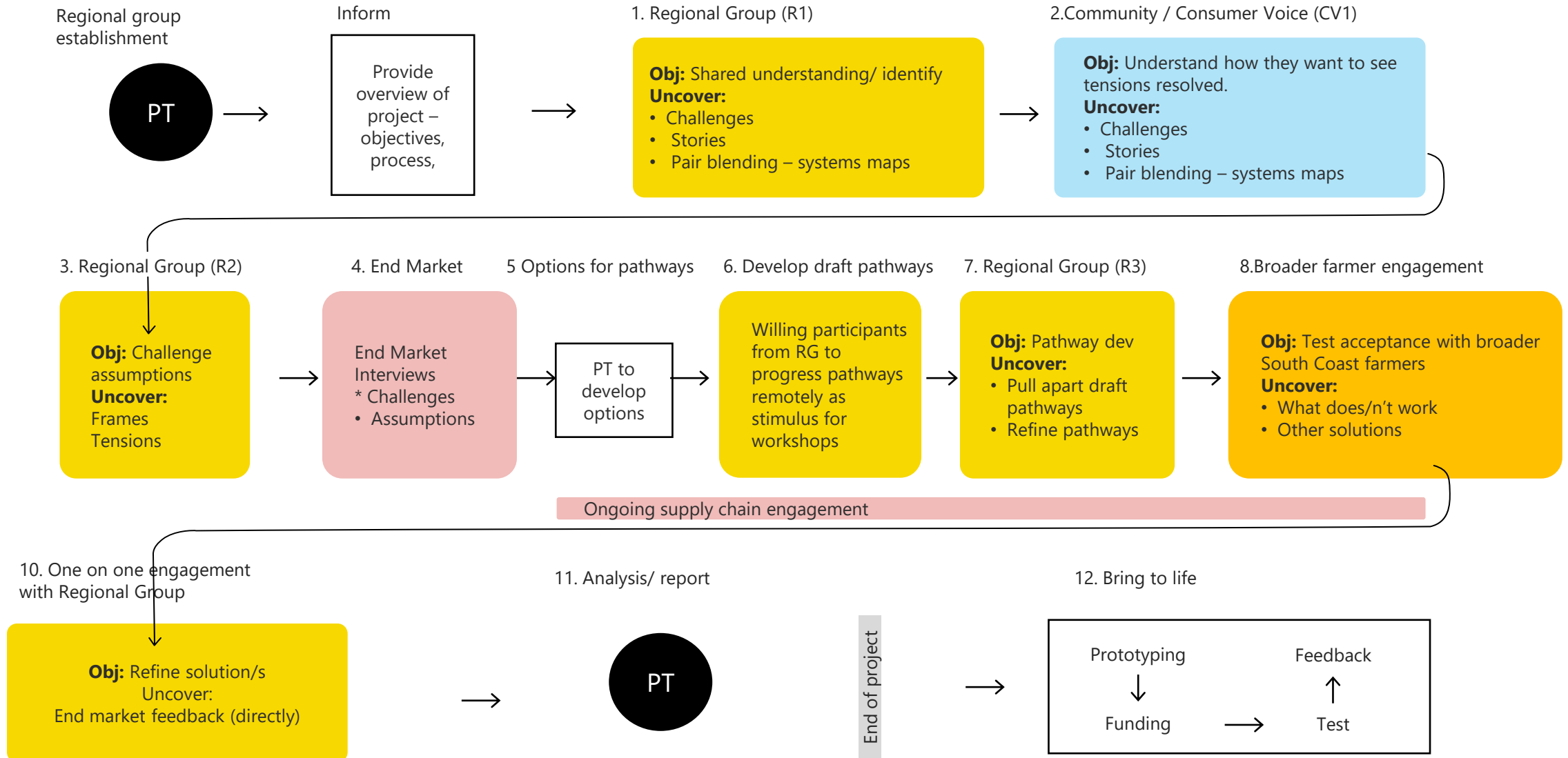
- Regional group session
- Community group session
- End Market Session



To:



And finally



What worked well with the process

Flexibility to change the approach as circumstances changed to deliver the project results

Establishing a strong relationship with the group at an initial face to face meeting

Engaging all parts of the supply chain through the process

Expanding project build to consider other regions similarities/ differences

Facilitating opportunities for new partnerships/ relationships to form

What we learnt through the process

Challenge

Attracting farmers to multiple all day face to face meetings is difficult.

(Dairy farmers are always on 24/7)

Not all farmers are willing to 'actively' participate in multi-stakeholder groups and work better as a farmer group

(Farmers listen to other farmers)

Farmers are unlikely to participate in Zoom/ online sessions

(On-line sessions do not easily fit with the dynamic demands faced by dairy farmers in their daily lives)

Suggested approach in future

Face to face at the start and potentially end, with direct 1:1 engagement through the project

Farmer only discussions when exploring challenges/ barriers. There is still the need to have the voice of the farmer in multi-stakeholder dialogue and would work well with willing farmer members of the group participating in the multi-stakeholder forums.

Phone calls to the farmer participants were the most effective and while more labour intensive are much more effective. Zoom/ online worked well for other stakeholders.

1.2

Summary of Project Results

In the final stage of engagement three potential projects were put to the regional group

A

Producer demonstration site



B

Economic impact assessment



C

Engaging behaviour change



***Order rotated across each interviews to ensure no research bias (A:B, A:C, B:A, B:C, C:A, C:B)

Overall, the economic impact assessment was the preferred option

B

Economic Impact Assessment

There has been substantial research undertaken to understand the management of surplus calves, however to date there isn't a strong understanding of the financial implications of addressing surplus calves through different interventions on farm.

Working with farm business management experts, a detailed case study or set of case studies could be undertaken to understand the financial implications at the farm level for different interventions such as varying calf breed, rearing method, diet, age of sale and markets accessed in varying seasonal and commodity price environments.

Project Outcomes



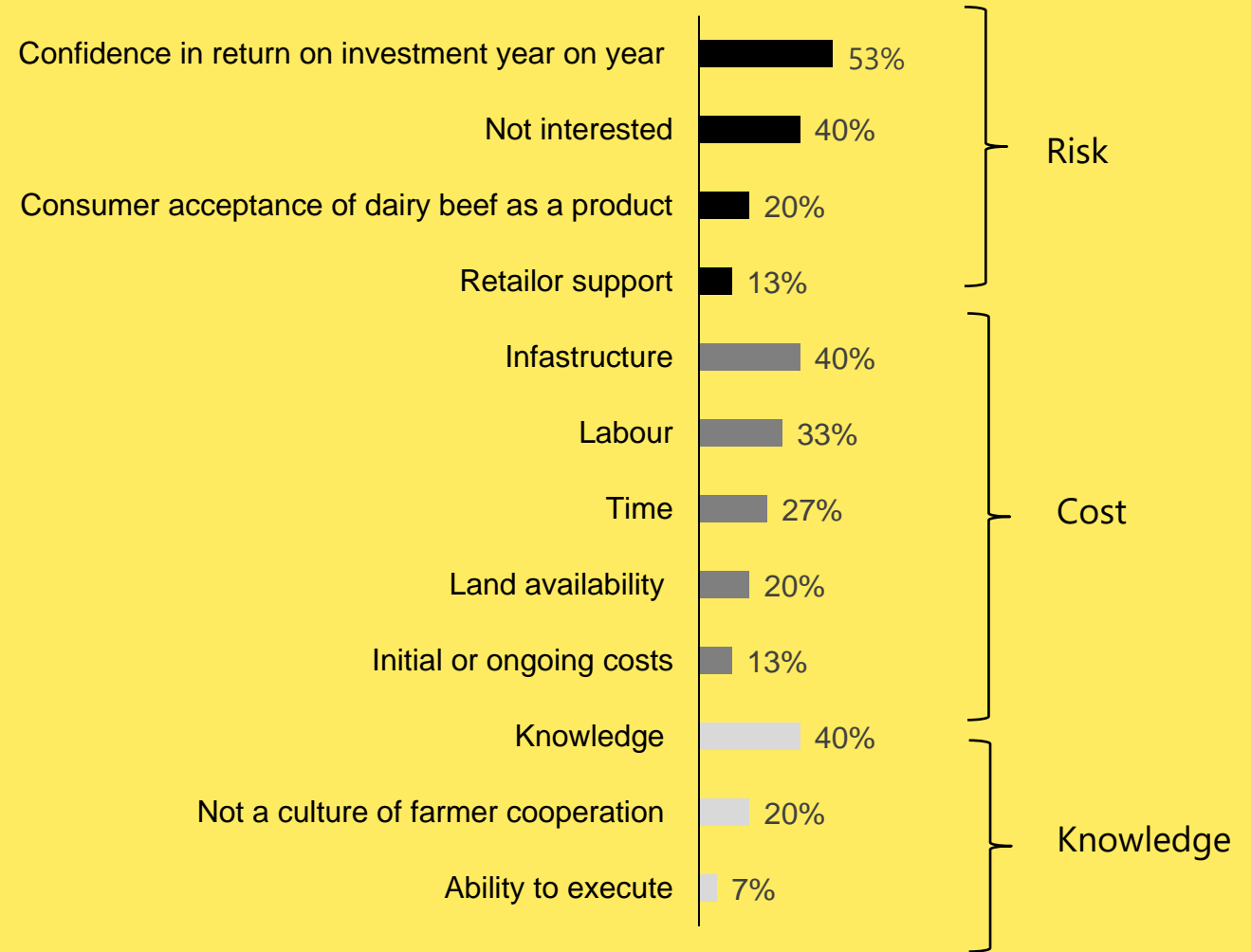
Project identified for the region



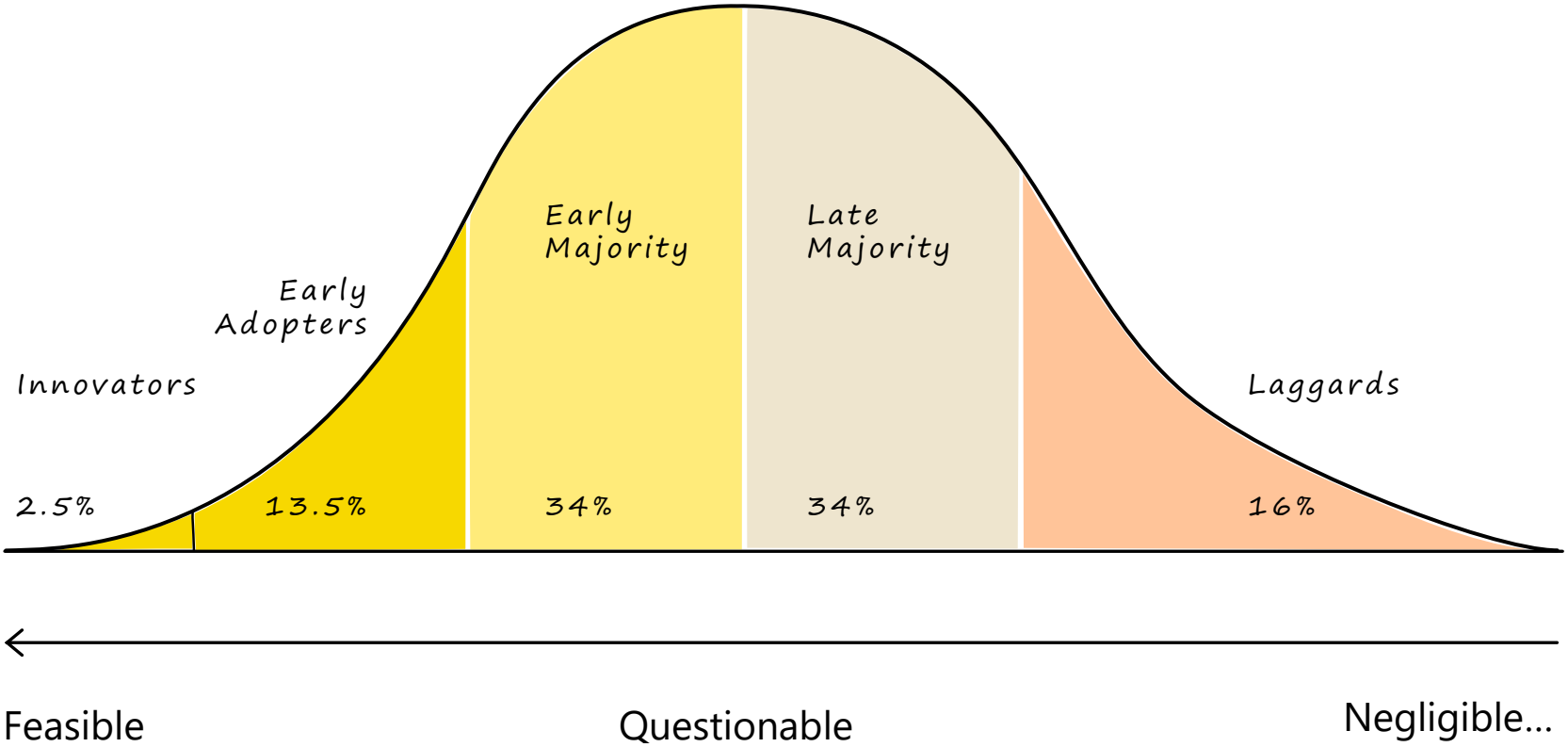
Enabled further collaboration with the formation of networks and a cross RDC project



Mindset shift from seeing consumer perspectives



The pathways explored are all carrots. A stick is likely required to shift laggards



3

Findings: Regional Group 1

Objective

Regional Group 1 was about building rapport among the group and understanding different perspectives

The below process was undertaken with Regional Group 1

1

Built rapport and dialogue

Shared stories to help form the group, encourage understanding, open dialogue and introduce possibility of multi-perspectivity.

2

Defined success

Defined and explained what success looks like for Dairy Australia.

Defined what success looks like for 'me' individually.

Defines what success looks like for the South Coast Region.

3

Systems mapping

Developed a systems thinking mindset to consider the complexity of the issue and the multiple perspectives at play.

Identified a unified map of the system and highlighted key tensions and opportunities to work on

Summary of key observations from Regional Group 1

Dairy Farmers are always on

The daily cycle of life for dairy farmers is both busy and relentless: it's hard for them to even 'pop their heads up.'

This creates a short-term horizon in terms of thought and ability to action change.

Any adaptation pathways or specific changes in behaviour must be easy to implement and support.

Economics dominates

Across the group, the dominant frame was their 'livelihoods,' which primarily spoke to an economic frame.

Whilst bobby calf slaughter was recognised as a threat, animal welfare was not a significant driver of success for this project in contrast to the economic success imperatives or the view of consumers.

An implication of this economic frame is that consumers see farming as a fungible employer; in the consumer's world, "Could a farmer just get another job?"

Animal welfare paradox

Farmers were dismissive of consumers views of dairy as a 'boxed commodity.'

However, ironically farmers referred to bobby calves under a swathe of commodity euphemisms and labels such as 'worth nothing,' 'excess' or 'landfill.'

There was clear disconnect across all stakeholders regarding the different values of animals and a range of animal welfare concerns.

Summary of key observations from Regional Group 1

Animosity towards retailers/processors

There is a genuine grievance that retailers and processors have all the power and that all the value in dairy is concentrated in these few large industrial players.

Farmers have little influence over consumers but feel they are expected to earn 'social license,' even though the price they're paid for their product demeans the effort/work required to produce it.

Consumers as economic buyers

Conversation around 'consumers' were dehumanising.

Consumers were seen as rational choice makers, disconnected from the reality of farming and food production.

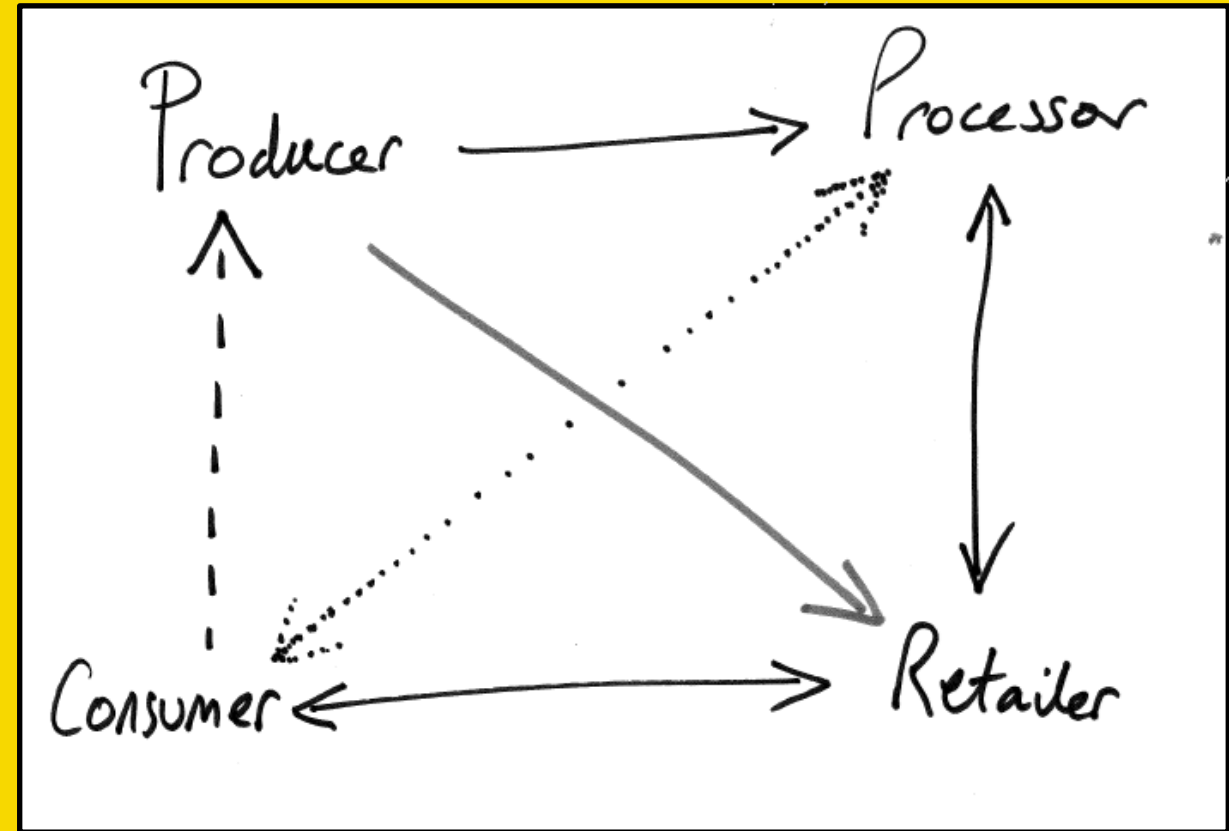
Isolated Farmers

There was a tendency to refer to consumers and bobby calves in unemotional language. This combined with animosity towards processors and retailers suggests that dairy farmers are increasingly isolated from key stakeholders.

This isolation risks limiting the scope for transformational change.

Regional Group 1 demonstrated how farmers are isolated and disempowered.

This insight supports the need to work with farmers, align producers with consumers, retailers and processors behind a common cause.



Farmers and advisors were asked to map the dairy system to see all components, parts and players in the industry

The purpose of this exercise was to understand how they see their world and identify points of tension in the system

Key insights observed from the mapping exercise

The dairy farm system includes various sub-systems

People 'bounded' the system differently from 'personal' to local, dairy to food.

- 1 The farm itself
- 2 The local dairy sector
- 3 The dairy food production process
- 4 The holistic production-processing-retailing-consumption system

Perceived power imbalance in the dairy sector

Many of the systems maps were linear. There was a discernable flow from farms through a commodity chain.

There were few feedback loops back to farm and they were generally not positive i.e. social license.

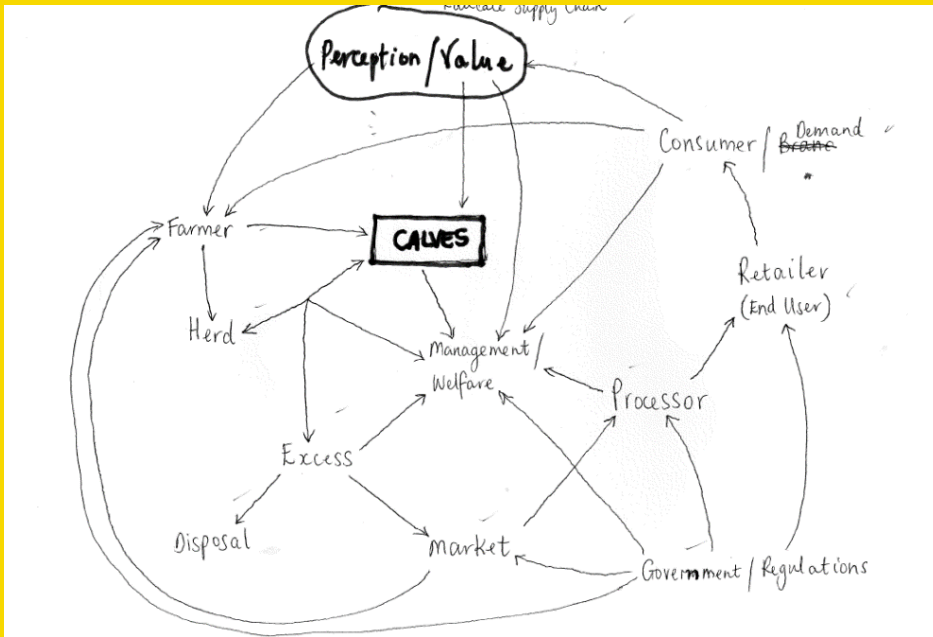
Dairy farming is anchored in the 'here and now'

The system was often defined at two distinct levels, either:

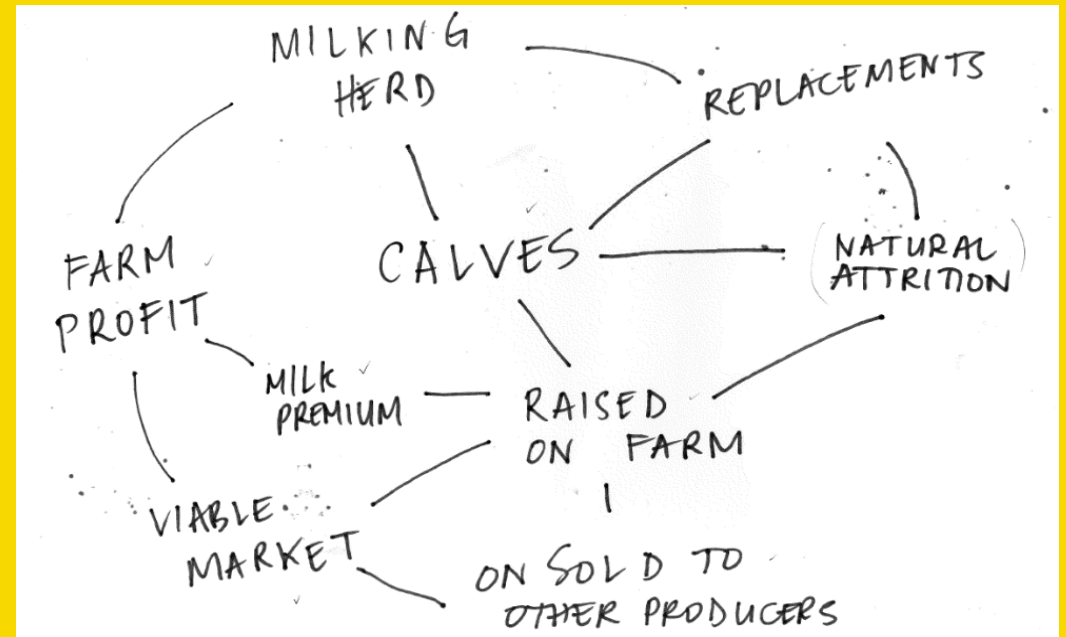
- 1 The farm level (local) or;
- 2 The commodity/value chain (holistic)

...But rarely both.

Examples of holistic vs. local boundaries



Example of a system map where boundaries are **holistic**: from the farm to government and elements of the value chain



Example of a system map containing only farm factors and direct local farm interactions: the boundary is **local**.

Key tensions identified from the mapping exercise

Tensions in the dairy farm system

Revenue The farm system is shown as an economic balancing loop: revenue dictates time / benefit trade-offs

Hectic Dairy farms operate on relentless short timelines, with many things to do; it's hectic (which is why they can't seem to see beyond or fix it on their own)

Opportunity

- 1 Reduce births of NRDC's (ideally only produce RDC's)
- 2 All calves drive revenue to the farm

The holistic (consumer) system

Price The price to farmers does not allow for changes in practices demanded by consumers

Low Price The low price to consumers has driven retailer/processor brand loyalty (power) but disempowered production (farmers)

Perception A perception of natural /unnaturalness dominates consumer choice and distorts reality of production/ processing

Opportunity

- 1 Dairy beef as an input to meat processing
- 2 Dairy beef as a consumer choice
- 3 Premium price for 'ethical' milk i.e. all dairy calves are raised on farm

Towards a systems dynamics diagnosis

Removal Can births be avoided?

Delay Can their slaughter be delayed or can they be reared on farm?

Divert Can they be reared elsewhere or collectively?

Commodity value Can they be of value in the supply chain?

Consumer value Can they be of value to consumers?

Implications of systems maps findings

1

Dairy farming is anchored in the 'here and now.' Consequently, any adaptation must be easy to implement (i.e. incremental) or supported to ensure it can be implemented.

2

The concentration of wealth/power to retailers and processors must be recognised either as a barrier to adaptation or as a lever to help drive transformative change.

3

Any NRDC strategy needs to be successful at two levels: the on-farm revenue system and the consumer-opinion led value-chain.

4

There is a need to reconcile/shift/reframe the different views of farming as a livelihood (cows as a commodity, efficiency and wastage, economic) and farming as a 'way of life'

4

Findings: Consumer Groups

Objective

Test perceptions of bobby calves and potential solutions to understand what is socially acceptable

The below process was undertaken with consumers

1

Gathered general attitudes

Gathered general attitudes to derive the values they link to sustainability and animal welfare.

Unpicked attitudes towards and understanding of the dairy industry and identified assumptions.

2

Exposed bobby calf issue

Exposed the bobby calf issue to consumers to understand community responses towards the key issues and determine potential threat to the industry.

Gained understanding of community attitudes towards specific issues that are core to the bobby calf problem and queried by the industry.

Gauged community response to language specifically to provide guidance for future language.

3

Feedback on solution areas

Sought initial feedback on solution areas that informed the next industry discussion.

Reinforced the point that the industry is taking positive action to gain a steer for the next discussion

Summary of key findings from the Consumer Groups

Consumer guilt, not animal welfare is the issue

The bobby calf issue was new but unsurprising.

Consumer response was guilt fatigue – they're tired of feeling guilty about the food system and cognitive dissonance being their only defense against guilt.

Consumers weren't blaming dairy farmers for their practices; it was about them wanting to do the right thing, not farmers doing the wrong thing. Consumer guilt, not animal welfare is the issue.

It's not 'a vocal minority': it's a journey everyone's on

For many, consuming dairy was no longer a care-free act; it's ridden with internal conflict with arguments against drinking dairy stacking up on top of each other.

Consumers are making more sustainable and ethical choice – some just need it to be easier than others

Consumers 'do' ethical and sustainable consumption by making choices and there was felt to be little choice to consumer dairy ethically

'Consumers' see the dairy world similarly to farmers

Like industry, consumer acknowledge that consumer considerations are incomplete and that retailers play an inequitable role in the dairy system

Consumers saw the 'industrial' system as the 'bad guys' who shirk responsibility and dairy farmers who are the 'fall guy'

Consumers had empathy for how hard dairy farmers work everyday, for little reward. It's not 'us vs. them'

Opportunity to reframe the challenge and side with the consumers...

From:

How do we 'solve the bobby calf issue?'

To:

How do we allow Australians to stop feeling guilty about buying milk?



Opportunity to provide a service to Australians... 'guilt free dairy'

A small decision in their food life that's not tinged with guilt

Can we provide them with a meaningful choice so they can feel good about themselves?

5

Findings: Regional Group 2

Objective

To get the regional group back together to review consumer input and identify tension points in the system to ideate novel solutions

At the start of the workshop attendees were read a series of love/ break-up letters from the consumer groups.

Unsurprisingly, this created a heightened sense of anxiety, anger and antagonism.



Dear Dairy,

For 20 whole years, I loved everything dairy had to offer me. Consuming dairy meant that I could eat basically whatever I wanted...But then I was eating it five times a day, in some shape or form, and my skin was not thanking me for it.

So the first way I say goodbye to dairy was by changing to alternative milk and yoghurt wherever I could – coffee, breakfast, baking, cooking. I think this is generally the first way most people go. The only time I ate dairy after that would be when I was eating out and didn't want to be a pain, either to my friends and family or to the chefs. If cheese or dairy was in something I would just eat it. And at that point I loved ice cream WAY too much to even fathom giving that up.

But at that point, I could see a difference in my skin and feel a difference in my general wellbeing when I was eating lots of dairy as opposed to when I was largely abstaining from it – with the latter situation being much more optimal for my skin and health. It also felt easier to eat healthy without dairy in my life - no cheese added to things, no unnecessary calories from milk or cream as non-dairy alternatives are almost always lower in calories.]

And then on the day before I gave up dairy, I watched a documentary about how terrible the dairy industry is, not only for the poor animals involved, but for the planet. And since then, I haven't knowingly touched dairy. And no, I'm not calcium or protein deficient.

However, presenting the consumer research results broke down the 'us vs. them' mentality



Mindset before seeing the research

Defensive
Discomfort
Anger
Pessimism

Mindset after seeing the research

Open
Optimistic
Motivated

Sharing consumer research provoked openness to the mindset of 'working with' consumers and a realisation of an opportunity ahead

As a result of sharing consumer research, the regional group moved from antagonism to open-mindedness

- 1** Sharing the consumer perspective broke down the 'us' vs. 'them' mentality:
- Realisation that they (farmers) are not seen by consumers as the bad guys
 - Recognise the need to listen to, and align with, consumer concerns and desires
-

- 2** Farmers feel burdened by the need to solve the problem themselves
- Relief that the bad guy is seen as the 'system'
 - Desire to see processors and retailers take responsibility/be accountable
-

- 3** The opportunity ahead is realised
- Motivated to listen and align with consumers
 - Importance of working with community mindset is realised

To ideate solutions, attendees were presented with 4 novel solutions and asked to ideate all potential tensions

1

Brainstormed

Workshop attendees brainstormed all potential issues and barriers that may be faced including what might have to change, what needs to stop happening and what new things might need to start happening.

This took the form of a long list of issues, which was then laddered to deeper issues related to the challenges as a way to move towards the deeper, structural causes of the challenges.

2

Sweated

Attendees were asked to 'sweat' the issues and think deeply to consider the deeper challenges and structural barriers.

Specific structures included:

- Any 'rules,' either legal or entrenched habits
- Any 'values,' such as widely accepted social norms or changing societal expectations
- Any 'knowledge,' education or other gaps in knowledge

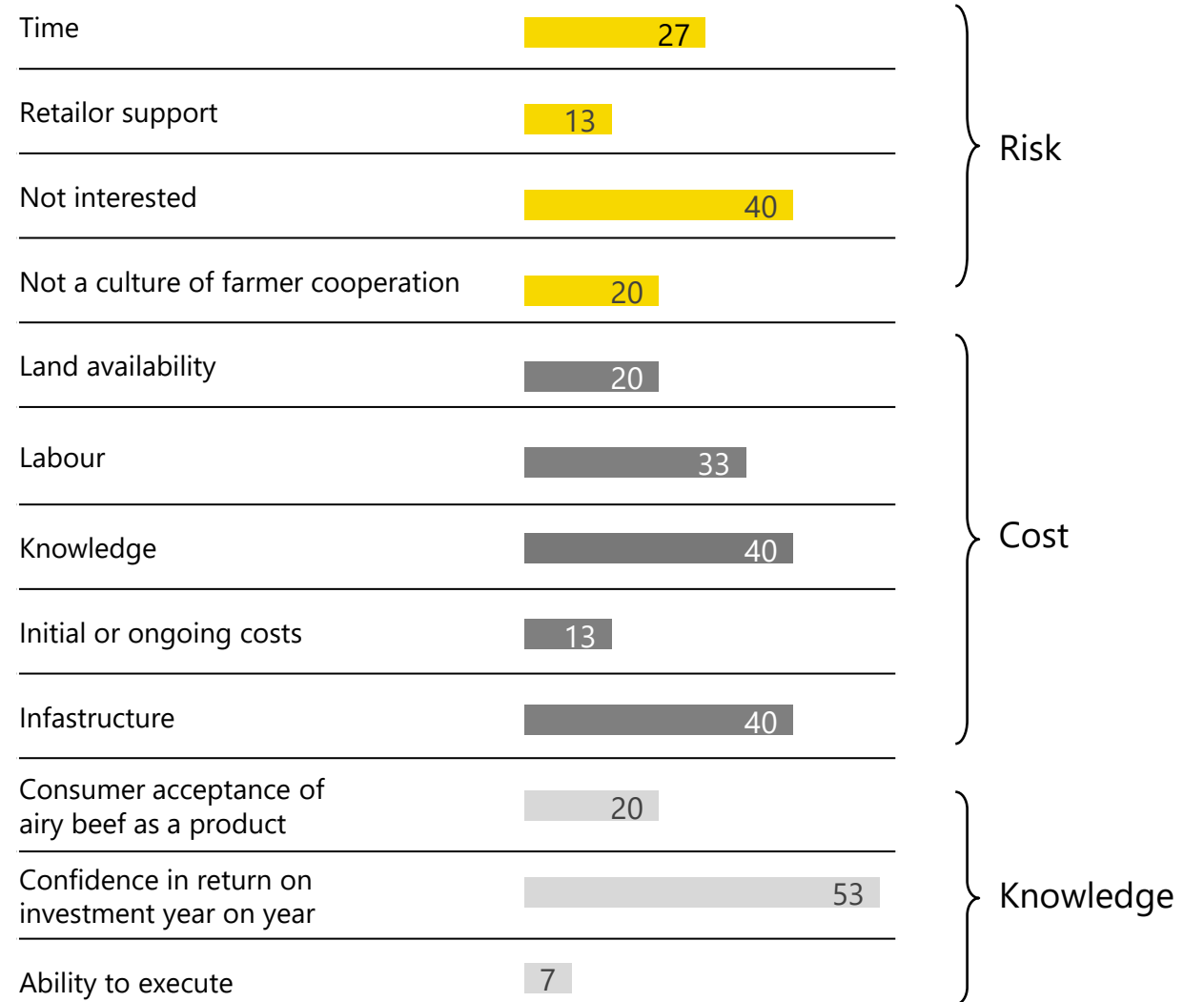
3

Polled

Polling of synthesised barriers to identify and prioritise potential roadblocks post workshop using a simple online survey.

This allowed individuals to make their own selection in a more considered way and also prevented peer or group influence.

Risk, cost and knowledge are the three biggest tensions in the system that farmers need to overcome when ideating potential markets, uses and novel solutions



6

Findings: Supply Chain Interviews

Objective

Interview supply chain partners to understand their perspectives and explore viability, feasibility and economic / end market needs for potential solutions

Summary of key findings from Supply Chain Interviews

1

Gap is closing to address the issue

There was universal acceptance that the bobby calf challenge is a 'huge sleeping giant' that poses significant risk to the industry.

While participants saw NRDC's as a shared issue, it was considered one that should be led by the dairy industry.

Critically, stakeholders noted the solution must commercially be able to stand on its own

2

Harness circular economy principles

Most stakeholders identified that a waste-product (in dairy) should be transformed into a valued product (in beef)

3

A need to understand the market

Supply Chain participants note that farmers need to provide calves that can supply beef markets.

Most supply chain participants don't expect farmers to raise animals to maturity, but do expect them to consider genetics required to meet market expectations.

4

No silver bullet

Most supply chain participants identified that solutions would differ by and between regions.

Ideally, there would be variants on solutions within regions to fit different farming models and preferences.

5

Backgrounding facilities are missing

Sexed semen and use of genetics can reduce surplus calves and create calves that have multiple purposes.

...but, many articulated the missing piece in the puzzle as backgrounding facilities as the next step of the chain.

There is a window of opportunity to act now

Supply Chain participants identified the opportunity to act now:

- Cattle prices are higher
- Cattle supply is tight

There is a window to use the income from non-optimised genetics to invest in optimised genetics for when the beef supply returns so that dairy beef is supplying an animal that the market will want.



7

Findings: Regional Group 3

Objective

Further refine solutions by understanding preferences and barriers to pathways and identifying support requirements

The below process was undertaken across Nowra, Bega and Smithton

1

Recap of research

Provided a recap on the project to date.

Shared results from stakeholder engagement

Update and facilitate engagement in project

2

Overview of emerging pathways

Presented an overview of available or soon to be available pathway options

Ensure understanding of pathway options available

3

Feedback on pathways

Explored, critiqued and got feedback on three key pathways

Understand how pathways could work and impact in their world

Fine tune pathways

Summary of key observations: A farmer's farm is their business

- 1** ...and from their perspective, they don't 'owe' the industry anything

- 2** ...and like all other businesspeople, they need to feel in control of their business

- 3** ...and like all other business owners, they don't want to align their business to pre-determined rules

- 4** ...and like all other business owners, they want to protect it

- 5** ...so, for change to occur, it needs to happen their way, on their terms and through their own initiative

- 6** So change will come about when they experience conditions that result in a need for change...or unless it was already in their existing plans to do so

In a nutshell

It's not about adopting a solution; it's about getting them to want to find a solution

Shifting priority from

Finding a solution for them to adopt

To

Facilitating conditions to change
Supporting those already trying to change

The Group was presented with 4 pathway options to assess and fine tune

<u>Criteria</u>	<u>Greenhams</u>	<u>Elite</u>	<u>Calf Link</u>	<u>Open Market</u>
Calves collected at	3 options: <ul style="list-style-type: none"> • Weaned from 100kg • Backgrounders approx. 300kg, • Finished cattle 500-600kg. 	Collect from farm at 5 days	7-10 days	Variable
Dietary requirements	• Preference is for calves fed on a grain-free, antibiotic-free diet	Colostrum above 22	Day of travel electrolyte feed only	None
Genetic requirements	Balance of desired traits for both the dairy and beef enterprises	Holsteins anything with beefy frame	As market demands – black hided angus	None
Price paid	Currently market drive. Seeking to set up pricing arrangements for forward contracts	\$80-85 (\$20 above market)	\$50 head ex-farm	Variable (inline with ECYI)
Other Requirements		Dry cow vaccination	Calf needs to be in a good state Follow industry guidelines	None

Open Market caused the least disruption for farmers

While only formally presented in Bega and Smithton, both groups preferred keeping options open

Adaptable

The Open Market allows for a solution that works for their farm, their system and their way

An open market might or might not incorporate other solutions presented.

Provokes positive outlook

Farmers used significantly different language when talking about the open market

Positive outlook

"A lot of opportunity"
"Building resilience"
"Our way"
"Revenue streams"
"Increased profit"
"Find a solution"
"Greater choice"
"Access to research, education & advice"

"I can"

VS

Negative outlook

"Risk"
"No guarantee"
"Restricted"
"Loss of market opportunities"
"Loss of income"
"Need to change my system"
"Restricted"
"Require training & education"

I need to"

Fewer complaints

When assessing the open market, there were fewer (or no) mentions about....

Increasing costs
Increasing time
Increasing labour
Changing their system
Investing in infrastructure
Investing in new systems
Risk



The biggest issue with the 3 commercial pathways compared to the open market was that they locked farmers into specific management practices.



Farmers were more open to investing time and money when they felt they had the freedom to do it their way.

Summary of key tensions moving forward

While only formally presented in Bega and Smithton, both groups preferred keeping options open

Perceived benefit

Farmers saw more benefit to the industry and for community acceptance than for their business, family and farm.

They aren't motivated to change their business 'for the sake of the industry,' so, this needs to be flipped to motivate change.

No clear winner

There was no clear winner and there was little, if any, consistency in responses.

While there is a solution for every farm, they will need to want to find it.

A desire to optimise

Every farmer wanted to optimise solutions for their farm.

Farmers need to understand their options, but also have flexibility to customise based on their systems, breeds, motivations, and values.

To create conditions to change there is need to...

- 1** Normalise finding a purpose for every calf
- 2** Provide a range of options that can be assessed by each farm
- 3** Facilitate a farmer-to-farmer information and learning system



8

Findings Regional Group 4

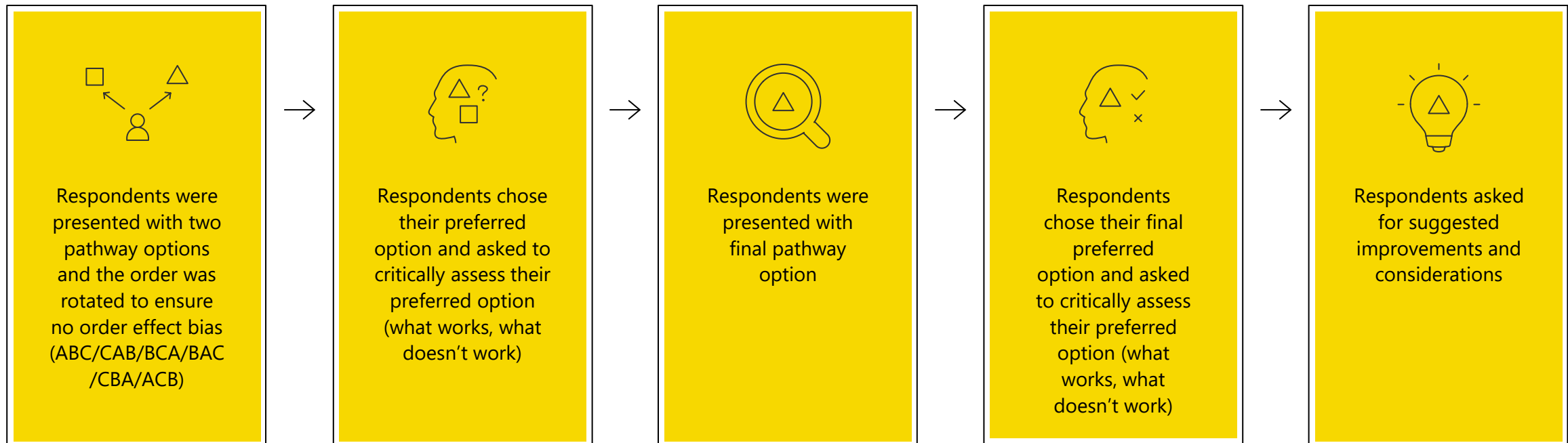
Objective

Identify a preferred pathway for funding with suggested improvements

What we did

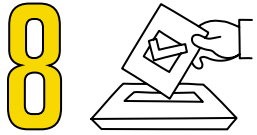
Farmers and stakeholders were presented with three pathway options for addressing the Surplus Calf challenge on the South Coast.

A preferred pathway was chosen by eliminating an option and critically assessing their preferred option. Several participants also suggested improvements to the projects.



The economic impact assessment option was the preferred option

1st preference



Economic impact assessment

Addresses information need and knowledge gap of costs for managing surplus calves

Leads with the language of business and gives farmers confidence of the impact on farm

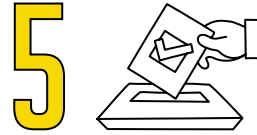
Potential for broader scope of multiple farm systems

Less vulnerable to external influences

Relevance beyond Nowra

A natural first step in the larger solutions framework

2nd preference



Producer demonstration site

'Show' don't 'tell' approach appeals to farmers

Potential to normalise addressing the issue

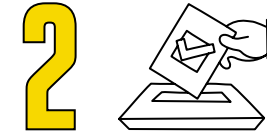
Lacks incentive to motivate laggards

Limited scope – only works within the South Coast Region and across one farm

Forming farmer groups in Nowra is challenging

Complimentary step to economic impact assessment

3rd preference



Engaging behaviour change

In principle, it's ideal but in practice, way more needs to be done

Time consuming – expect to see results in 10+ years

Less pressing than other pathways

Pathway not limited to only addressing surplus calves

A separate and broader industry-wide pathway

Leading with the economic impact assessment was seen as a natural first step

What works

Addresses significant knowledge gap about on-farm cost implications

Business-based reason on top of ethical/ reputational risk increases farmer confidence

Less vulnerable to on-ground pressures that may delay/hinder project

Can be implemented immediately

Potential to cover wide and diverse range of farm systems

High appeal amongst younger farmers

Relevance beyond Nowra

What doesn't work

Report format is not engaging or motivating for all farmers

Access to accurate numbers from farmers

Need addressed

Lack of information and understanding of input vs. output costs of addressing the issue

Evidence to provide structure and framework for decision making

Improvements

Include case studies to incorporate diverse and wide range of different farm systems

Include case studies to incorporate wide range of market preferences

Include case studies spanning geographies

Avoid focusing only on operational costs

Communicate findings in multiple engaging formats

Allow for diversifying and changing markets

Model assessment from ground up

The economic impact assessment is the missing piece of the puzzle

Addresses lack of understanding of input and output costs of managing issue

Provides evidence base for decision making

Finance-based evidence gives confidence to consider options

Relatively easy to undertake economic impact assessment



Considerations for project design

Allow for diversifying and changing markets

"They need to allow for changing markets and look at options around diversifying"
Supply chain participant

Include risk in the model

"They need to look at it from an extreme market risk point of view. There is a need to look at the biosecurity risk and FMD too, which is a bigger risk to beef than dairy"
Supply chain participant

Include a wide range of business systems

"It needs to include a range of systems...some surplus land, good calf facilities, some overcrowded / understaffed... If they're going to do an economic analysis, it needs to be done from the ground up"
Farm consultant

"Every business is so different at a regional and individual level. For example, labor, bedding, housing structure between regions is different"
Farmer

Avoid focusing only on operational costs

"They should do a situation and facilities analysis and then superimpose on the economic analysis for CAPEX, not just operational costs – i.e. 500k for calf sheds – then to look at what their return will be"
Farm consultant

"Model from ground up, otherwise just operations only not CAPEX investment and opportunity costs"
Farm consultant

A producer demonstration site was felt to be a natural, complimentary next step to the economic impact assessment

...but a focus on only one farm limited appeal and relevance to participants with different farming systems



"To be of value, it would need to show us our options for more than just one farm system and various rearing preferences...such as ages of getting calves off the farm and different kinds of farms" **Farmer**

Summary of producer demonstration site

What works

Complimentary to economic impact assessment

Peer-to-peer communications is a trusted way to change behaviour and normalise addressing the bobby calf issue

'Show' don't 'tell' approach to education appeals to farmers

Trusted way to change behaviour

What doesn't work

A focus on only one farm limits appeal and relevance for many

Lacks enough incentive to 'pull in' resistant farmers against perceived risks

Vulnerable to market and on-the-ground risks

Focus on South Coast locale restricts relevance within and outside of region

Reliance on engagement from farming community that is disengaged, un-cohesive and lacks strong networks

No guaranteed market

Need addressed

Provides the 'how' to the 'why' of the economic impact assessment

Show options for practical application on-the-ground

Potential to socialise addressing the bobby calf issue

Improvements

Desire for more 'hard' business data evident when many respondents suggested this worked better alongside or after an economic impact assessment

A need for multiple demonstration sites to incorporate varying farm systems and rearing preferences

Ensure transparency and accuracy of reporting time, effort and investment required

Thank you



Pollinate

Compliance @ Pollinate

Pollinate is ISO 20252 certified, the international quality operating standard for market research agencies. We are members of The Research Society, abiding by the Professional Standards as outlined on www.researchsociety.com.au including the "Code of Professional Behaviour". We also adhere to all state and federal legislation regarding privacy protection & data management when it comes to managing our projects

Now we have debriefed your project, there are a couple of things we'd like to let you know...

Third parties involved

If applicable, Pollinate engaged with third parties to deliver sample for this project e.g for either the Quantitative or Qualitative component...

Qualitative

Supplier: Internal – Dairy Australia

Sample size: n=64

M/Y of fieldwork: Feb 21 - August 22

If you have any questions regarding how the third parties are managed, please let us know

What you should have

As part of the project, you will have on file the final version of the following documents...

1. Our proposal, outlining our approach, sample size and costings
2. The Discussion Guide outlining the discussion flow of the research (if applicable)
3. The Questionnaire (Quantitative) or Recruitment Schedule & Screener (Qualitative), with the questions used to qualify participants and if relevant, a schedule with incentive amounts, research dates and times of the fieldwork
4. Our debrief, the final presentation with our findings from this project

If there's anything you don't have, or would like to make sure you've got the most recent version of, please let us know and we'll get this to you ASAP

Other info upon request

This varies project to project, and not all is applicable to this one, however if required we can provide other info on how fieldwork was managed...

Quantitative

- The fieldwork method (e.g. in-person, door-to-door, CAPI, CATI etc)
- Sampling details
- Number of fieldworkers
- Fieldwork validation methods
- Questionnaires and other visual exhibits or data collection documents
- Weighing procedures
- Estimating and imputation methods
- Number of cases used in subgroup analysis
- Reliability of the findings

Qualitative

- The fieldwork method (e.g. in-person, telephone or online, individual or group interviews etc)
- Recruitment method or methods
- Number of fieldworkers or moderators
- Fieldworker or moderator validation methods
- Documents, materials or products used in the research
- Interview or discussion guide
- A statement that the results of qualitative research cannot be projected onto the overall population

Closing your project

As the project is now complete, we'll start our process of closing it, which involves the following...

1. De-identifying all respondent information and if applicable deleting any lists/sample sent to us by you or one of your partners
2. Collating all project materials, keeping only those we deem relevant and archiving for a period of 12 months
3. If applicable, we will retain video output related to this project for a period of 2 years from the date of this debrief. After this time, we will delete any project related video that's not included as part of the final debrief document
4. Please let us know within 4 weeks of the debrief date if you would like any project materials or video retained longer than outlined above