

QUANTUM

MARKET RESEARCH

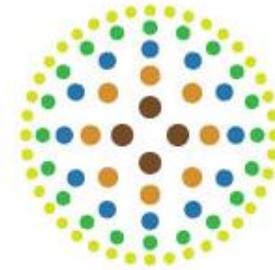
Consumer perceptions of Australian wool and cotton farming

August 2018

Experience with Agriculture



Horticulture
Innovation
Australia



RURAL INDUSTRIES
Research & Development Corporation



Department of
Primary Industries

AUSTRALIAN EGG
CORPORATION LIMITED



Dairy Food Safety
Victoria



Nufarm

Grow a better tomorrow

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Purpose of research

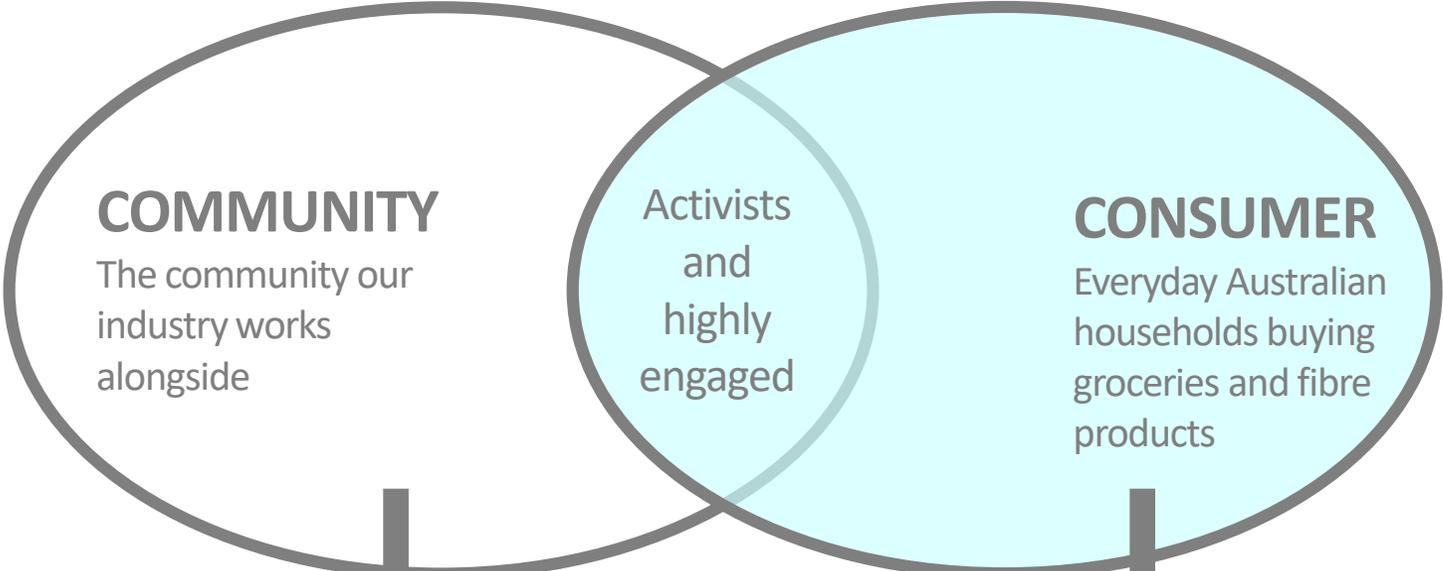
NSW Farmers is currently undergoing a...

Community & Consumer Engagement Project

What is the purpose:

- Undertaken against a commitment between the Government (DPI) and NSW Farmers' Association
- Investigate and address community and consumer trust in primary industries
- Seeking a national, whole of industry approach to ensure long term, effective consumer and community engagement by Australian primary industries and its stakeholders

Community vs. consumer



Noise level and influences

Consumer sentiment tracker



TRUST INDEX

Future-proof as a result

Both Reactive and Proactive

Today: Reactive

Reactive to issues

Provide diagnostics & deep dives
to respond individually

Bring a market facing perspective
to the self-regulation agenda

Tomorrow: Proactive

Proactively manage reputation &
risk as a whole industry

Start to build strategies and action
at whole industry level to drive
market value

Benchmark study | Methodology & survey design



- n = 3,007
- Nationally representative
- Main grocery buyers or household shoppers

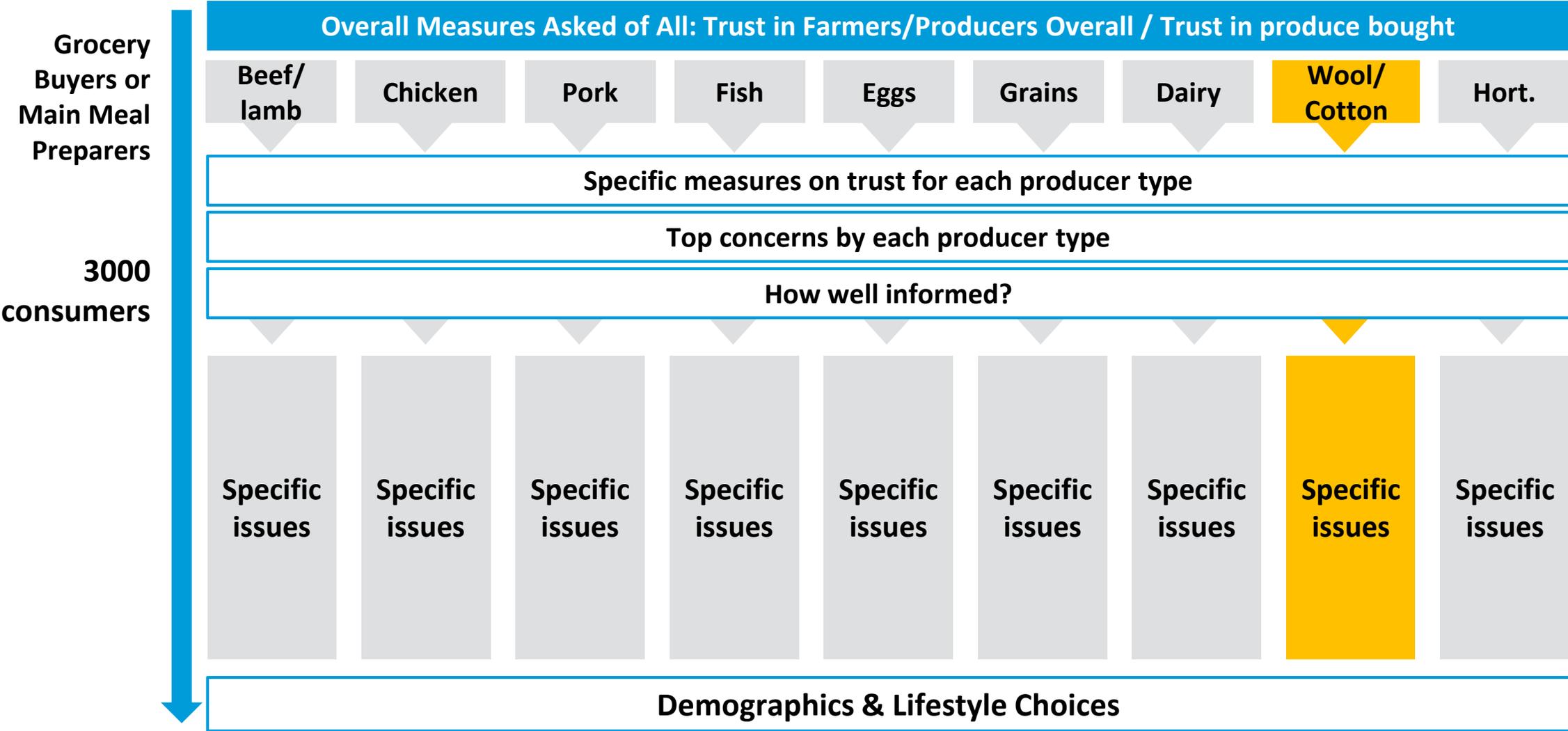


- Fieldwork dates: 7th – 12th Feb 2018
- Length of interview: 15 minutes



- Online data collection
- Core set of questions asked of all respondents. Each respondent asked two modules of questions by sector (i.e. red meat, fish, eggs etc.)

Benchmark study | Survey design



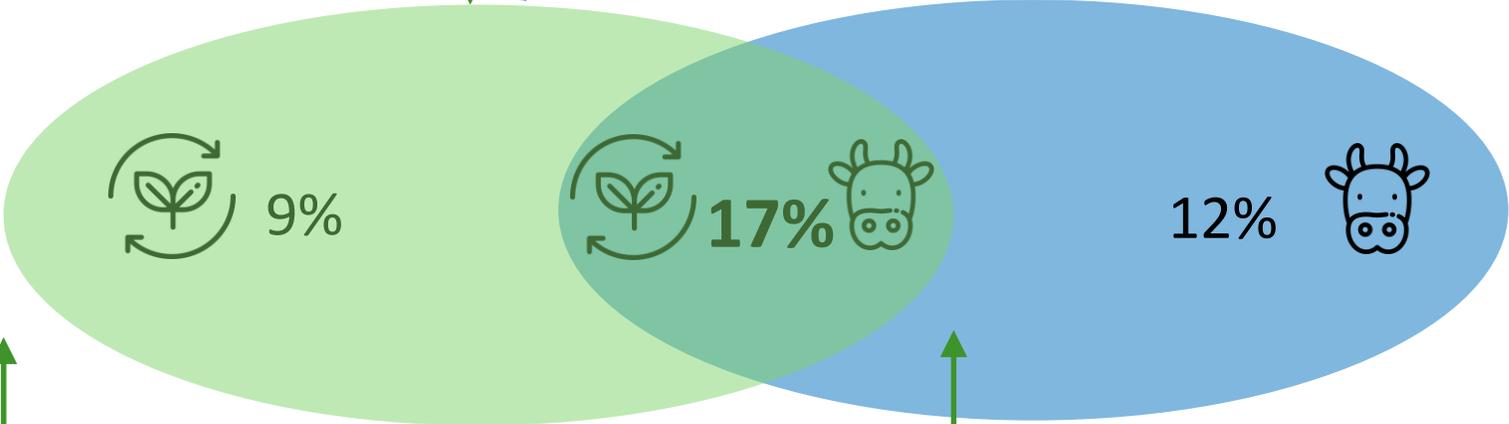
**Are the tree huggers and the
animal activists the same
people?**

17% can be classified as 'Engaged Consumers' - underpinned by their strong feelings towards the environment AND animal welfare issues

Of Australian consumers...

38% felt strongly about either environmental OR animal issues

Felt very strongly about the environment

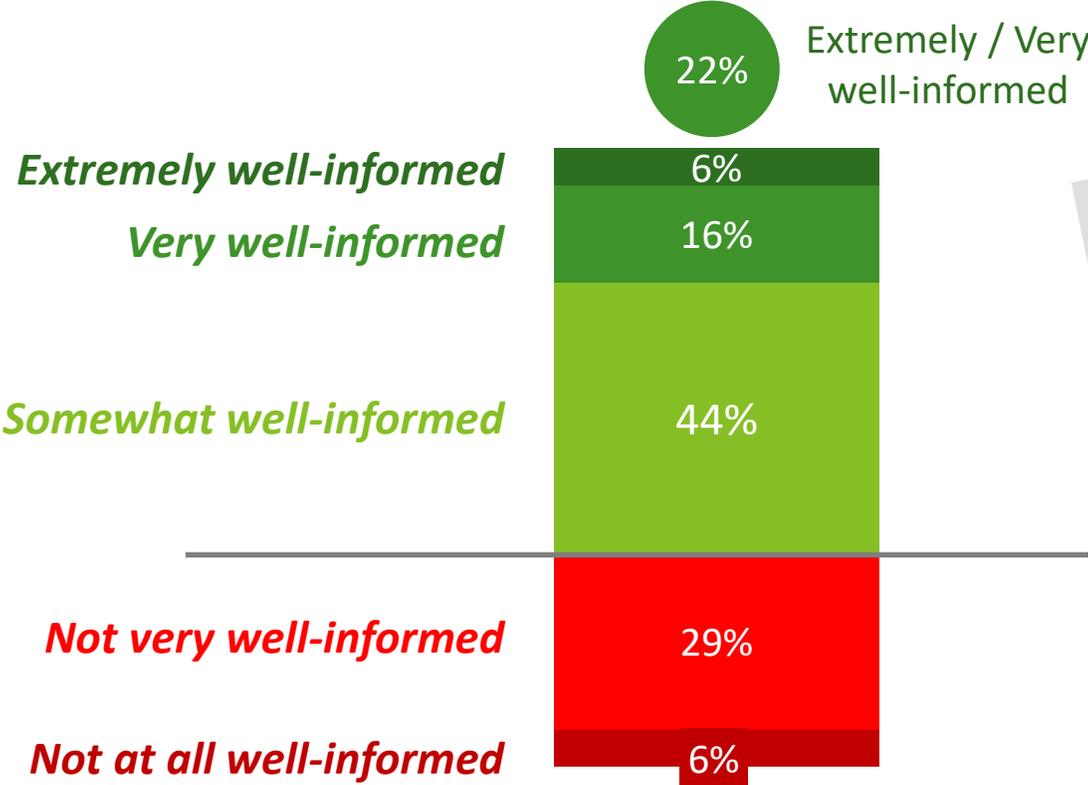


Felt very strongly about animal welfare

26% feel strongly about the environment

Most consumers were not aware of the real issues in farming and what it means for their food or fibre

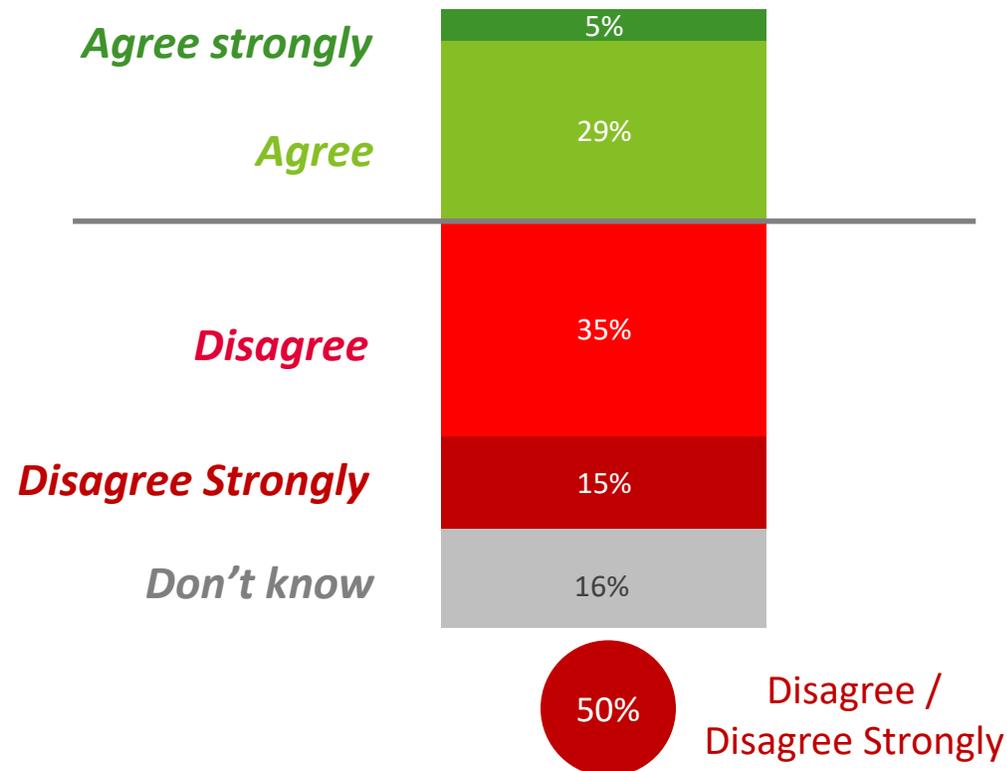
Most consumers were not well informed about farming practices in Australia



Just under one in four of consumers were very well informed about farming practices in Australia.

Half of consumers agreed there were some major concerns in Australian farming

Agree that... "Australian farming has no major concerns that I'm aware of at the moment"

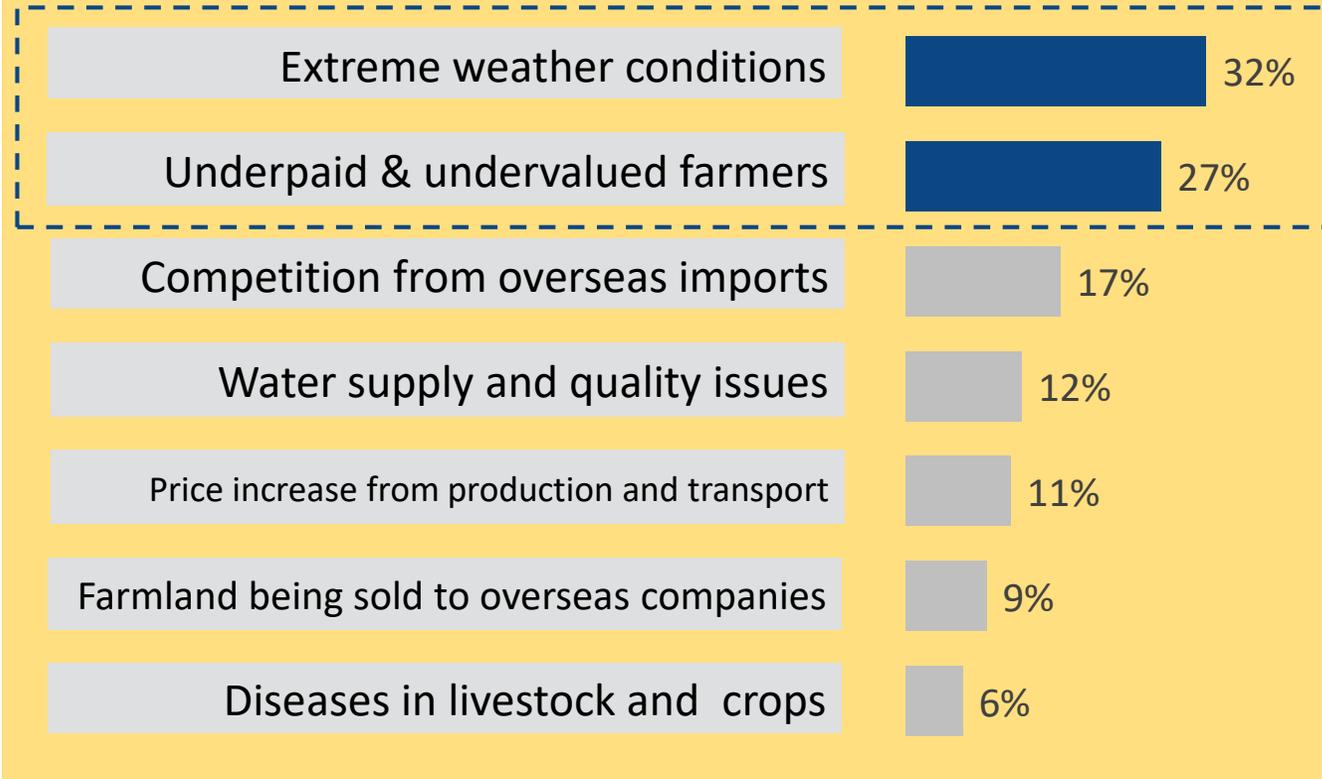


This demonstrates that half of consumers were aware of a major concern with Australian farmers.

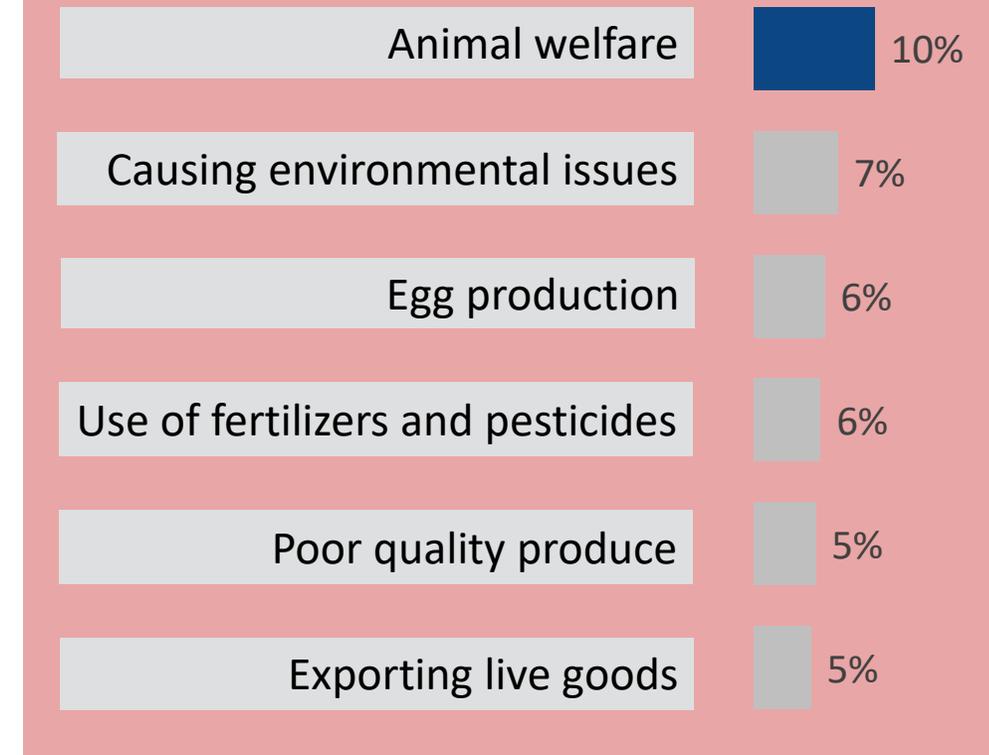
What were the major issues in Australian farming? Typically consumers support farmers BUT there is concern about animals & environment

Awareness of major issues with Australian farming

Issues which impact farmers



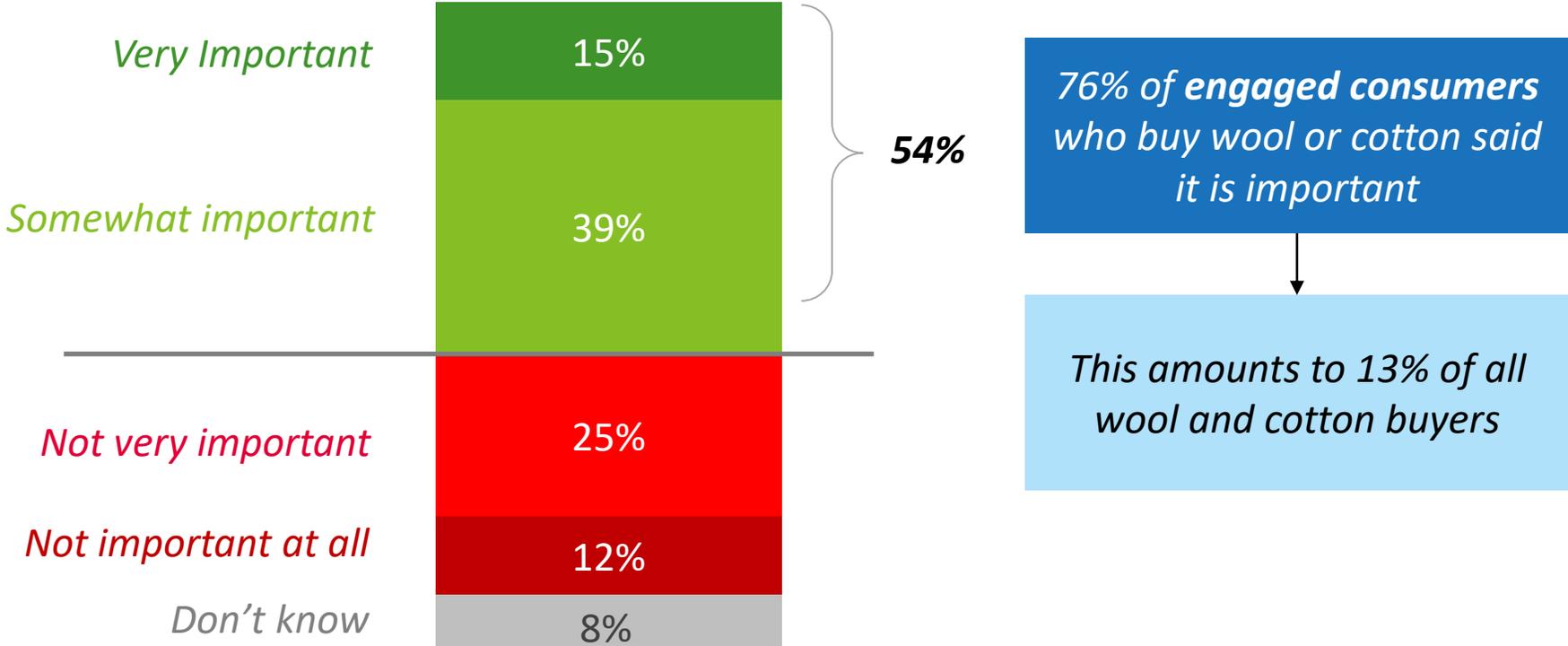
Issues which impact consumers





54% of consumers said it was important to have Australian grown wool & cotton

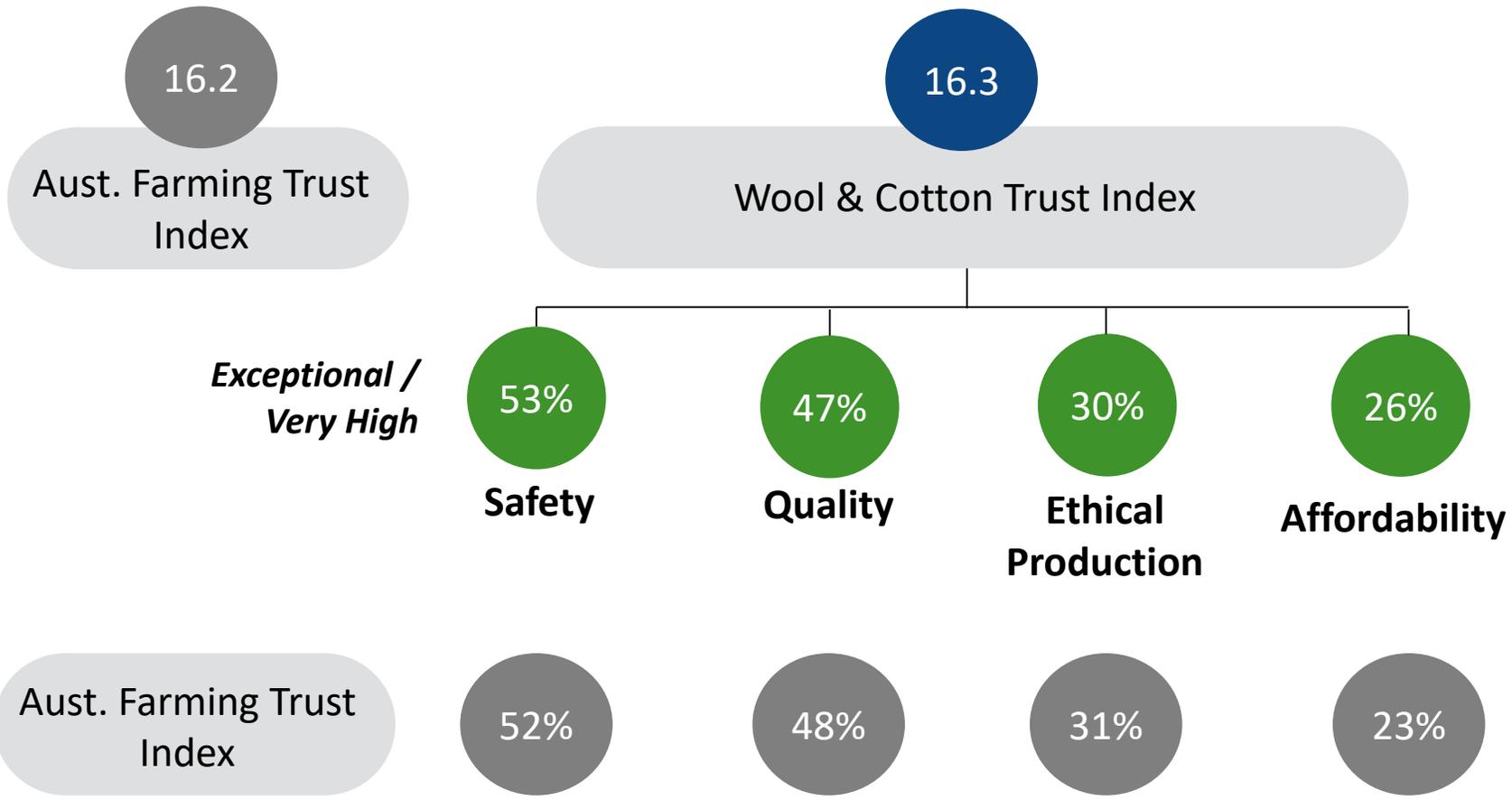
Importance of Australian grown wool or cotton



Point of sale drivers of influence



Trust in Australian wool & cotton

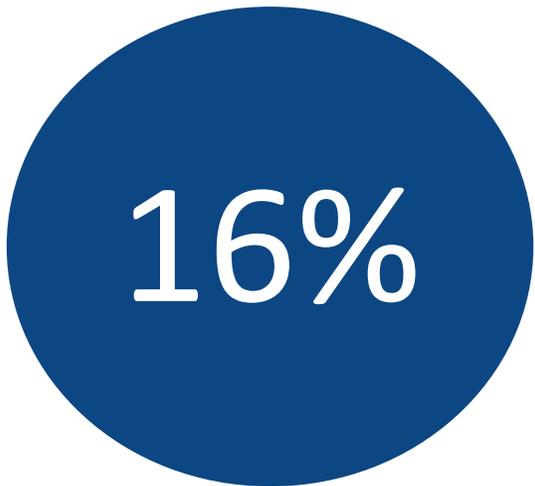


Level of Trust	
Exceptional	21-24
Very High	17-20
High	13-16
Average	9-12
Poor	5-8
Very poor	0-4

The Trust Index sums up four 'trust' related statements that consumers rated and provides a score out of 24.

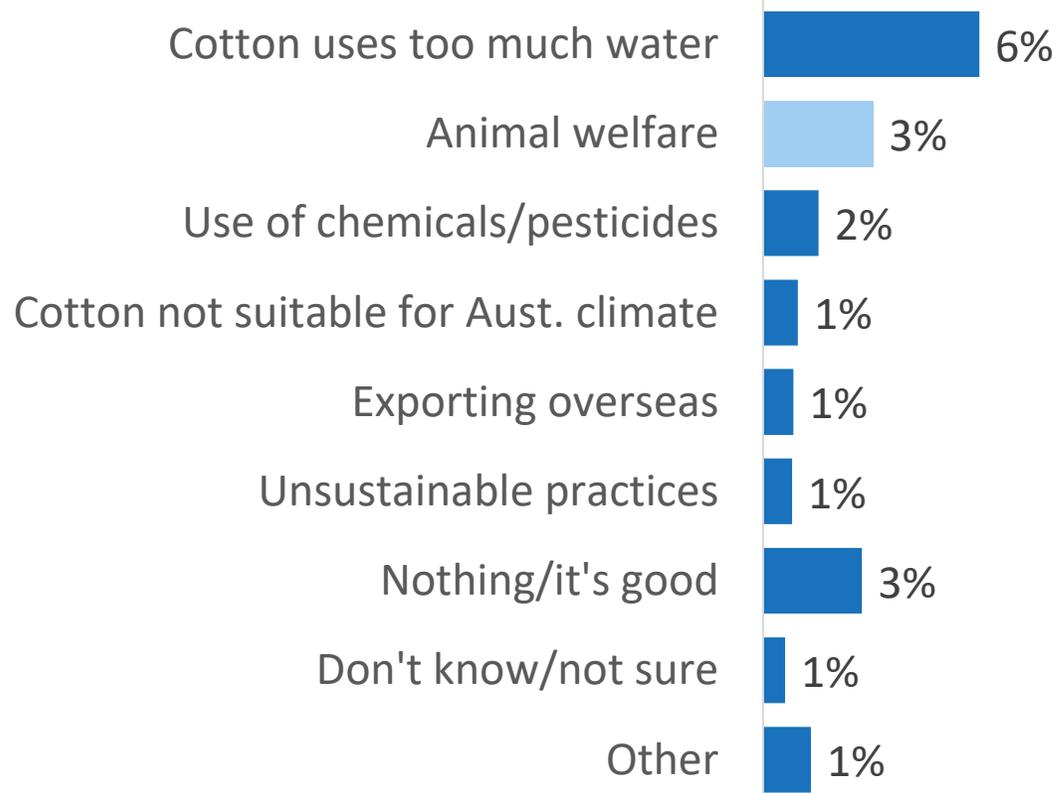


Spontaneous concerns about wool or cotton farming are low



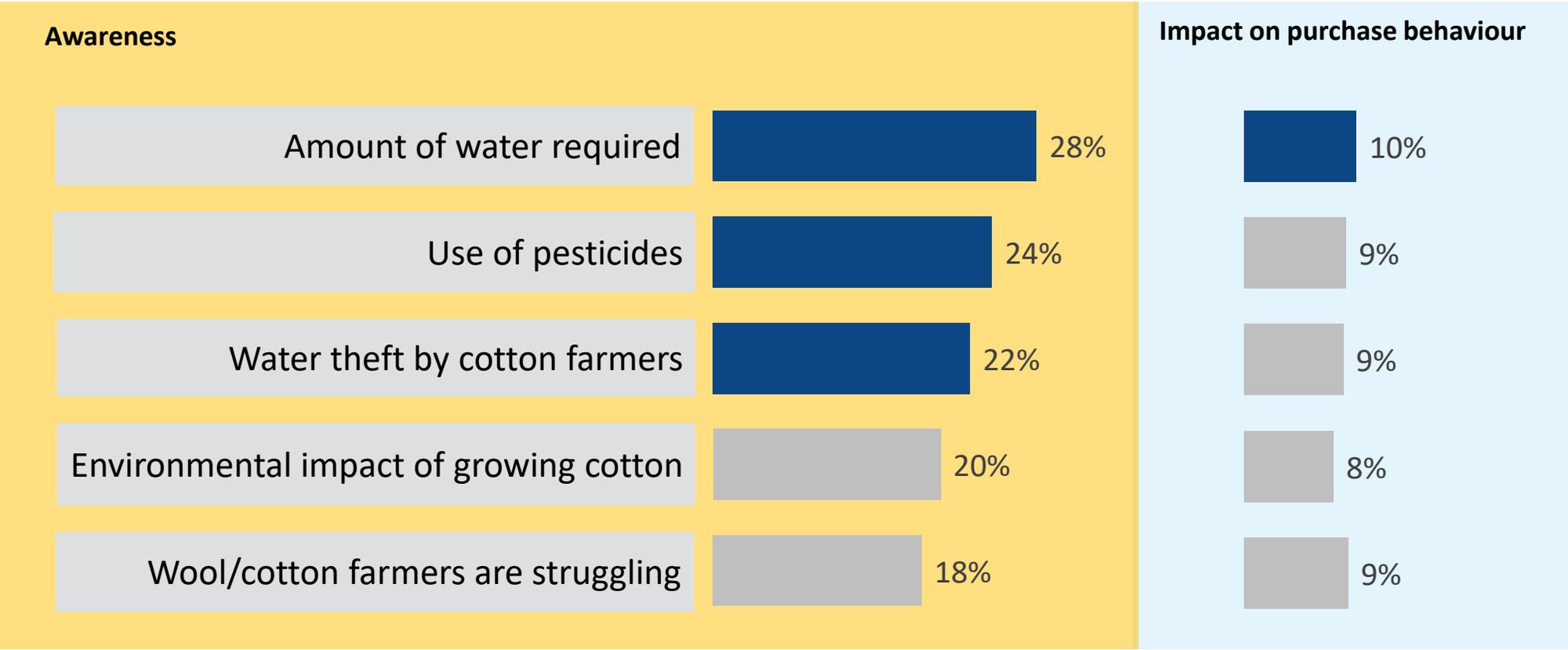
Have concerns about wool or cotton farming

28% of Engaged Consumers said yes they had concerns





Prompted awareness of issues with wool / cotton farming



The logo for Quantum Market Research is centered on a background of overlapping, semi-transparent blue circles in various shades. The word "QUANTUM" is written in a large, bold, white, sans-serif font. Below it, the words "MARKET RESEARCH" are written in a smaller, white, sans-serif font, with each word separated by a wide space.

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