



**D&G'S CONSULTANCY**  
AGRICULTURAL CONSULTANTS

**Management Consultancy Project**

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**Raising and Developing the Profile of Highland Cattle**

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## Executive Summary

The Highland Cattle Society (HCS) enlisted the assistance of D and G's Agricultural Consultants, to conduct research and provide recommendations on how the HCS could improve breed awareness, in order to increase Highland Cattle numbers, sales and meat sales throughout the UK.

This document firstly outlines the current situation within the beef industry, the breed and the HCS, in order to evaluate the existing business, allowing for developmental suggestions to be formed. The research discovered that beef consumption is rising, and more importantly for the HCS premium cuts of meat such as steak are becoming more fashionable as disposable income rises.

A survey was distributed to current members, which allowed feedback to be formed on what they demand from their membership and how they feel the society can be improved, these responses can be found within the appendices.

The social media platforms were analysed, which indicated that they are not being utilised to their potential, which incidentally, the improvement around this area became one of the development points that the consultants felt would be important.

Suggestions such as a taste grading system (currently used in Australia) and a co-operative to aid the sale of Highlands into premium outlets were discussed, as the consultants thought this would provide a niche for the society whilst benefiting them in the future. Due to small numbers of Highlands being reared in comparison to commercial animals, specific outlets for the lower conformed animals are minimal. A new grading system and co-operative could work together to see the premium for Highland be accepted, alongside Highlands being a more common breed within high end restaurants.

Overall, the variety of ideas suggested should assist the society in achieving their aim of increasing sales of Highland cattle in order to increase the number of pedigree breeding stock and therefore the sales of Highland meat into the supply chain.

## 1.0- Introduction

The primary aim of this report is to investigate ways in which the sales of Highland cattle can be increased, in order to increase the pedigree breeding stock of Highland cattle, therefore increasing the sales of Highland meat into the supply chain.

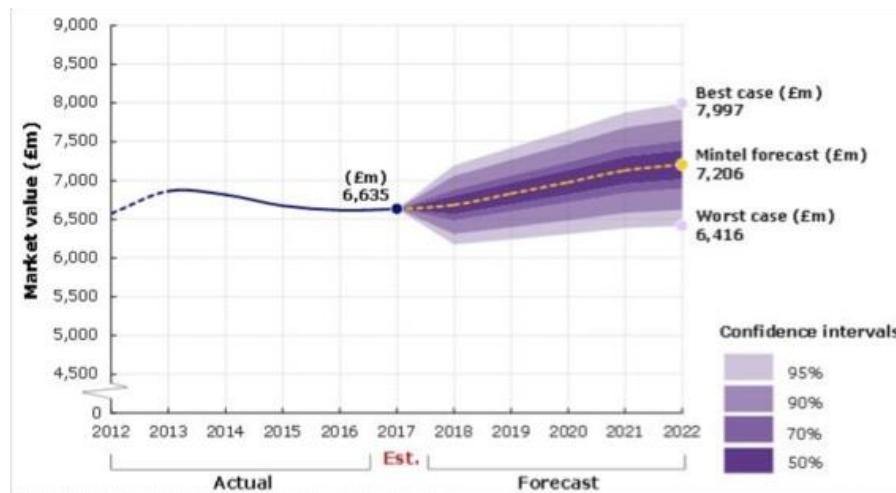
The current state of the business will initially be examined, in order to assess the future trends in meat consumption, alongside looking at what other societies provide to their members. The current market of the breed, website and social media platforms will then be analysed in order to test usability, alongside investigating what the current members think about these aspects of the society.

Recommendations will then be developed in order to review possible future paths for the society and breed. This will look at ways in which the consumer and farmer can benefit from these animals, provoking thoughts on what can be done. Finally, the main themes, which are deemed to be the most successful and relevant ideas will be discussed further, detailing time scales for the project and potential costs to implement. This will then allow the Highland Cattle Society (HCS) to implement ideas suggested, which should aid the success of the objective.

## 2.0- The Current State of the Business

### 2.1- The UK Beef Market at present and a future outlook

The UK red meat market is currently worth £6,635 million (Mintel, 2018) and in (2015) AHDB reported 59,341 beef holdings in the UK.



(Source: Mintel, 2018)

Figure 1: Forecast of the red meat sector in the UK

Estimations show that the red meat market will increase to £7,206 million, however this could be higher or lower than expected. Unlike lamb, the popularity amongst consumers of beef has grown by 7% from 2012- 2017 and this increase is expected to continue rising by 5% from 2017-2022.



(Source: AHDB, 2017)

Figure 2: Change in retail volume and popularity of different cuts



Trends show that meat consumption rises with consumer's income level and this pattern is most visible with the more expensive cuts of meat, such as steak and the fillet. Over the last year general household income has risen by 2.3% (ONS, 2018) and this could explain the rise in popularity of beef.

Although this indicates a currently strong position for the red meat sector with an increasing future demand for more beef products, it should be considered that many people in the UK are cutting back red meat consumption due to health concerns. Mintel (2017) reports that 28% of British people had reduced their meat consumption in six months and over 49% of people in the UK would consider cutting their meat intake. The suggested daily amount of red meat is 70g (NHS, 2018). Another consideration is the increase in popularity of white meat such as chicken and pork within the UK. Both of these factors could mean a decrease in the popularity and consumption of beef in the future, potentially negatively impacting the market sales and instead of meeting the market forecast it could meet the worst case in figure 1. The current market environment for Highland Cattle is explored in more detail throughout the PEST in appendix 1.

## 2.2- Beef cattle societies in the UK

When assessing the current beef market, it is important to consider other native beef breed societies. The National Beef Association website lists various beef societies, native breeds are shown and analysed in appendix 2. The table evaluates other UK native cattle societies, looking particularly at membership prices. This allowed a comparison between the HCS and these other societies, showing that HCS membership prices are considerably higher at £92 for annual membership. This is supported by a respondent of the questionnaire (appendix 3) whom states *"I think the fees are exceptionally high in comparison to the other societies"*. This could be a drawback to the society and could result in farmers or smallholders that keep Highland Cattle not registering with the society. Another frequent difference is the greater amount of workshops that other societies run on finishing abilities that could be used to help the HCS members, especially supporting new members, which was mentioned throughout the survey numerous times with one annoyed respondent saying *"acknowledge that we exist"*. A full set of questionnaire results can be found in appendix 4.

## 2.3- SWOT Analysis for the Highland cattle society

A full SWOT Analysis of the HCS has been conducted and can be found in appendix 5. Aside from the strengths of the society shown below, there are also numerous benefits of the breed, these can be found in appendix 6.

### 2.3-1. Strengths of the existing society

Throughout this project, it has been clear how passionate the society members and council are about the breed and the society. This has been shown through their willingness to be involved in the project and is a vital strength that the society can utilise in the future, as both members and the council would like to work towards similar goals, alongside the council having their own ideas on how the awareness of the breed could be increased. Other important strengths are the sales and fold visits being very well advertised to all members, and the networking opportunities both internally and externally for the society are widespread. Aside from this the current website is very clear and easy to use for members to register cattle in minimal time. It was commented throughout the questionnaire data that many members thought the society did very well despite the materials currently available to them.

### 2.3-2. Weaknesses

The council struggles to implement ideas due to the nature of the members. The council needs to be able to focus on both smallholder and commercial members in order to provide support and relevant information effectively. The differences occur due to commercial farmers desiring to finish the cattle before the 30 month deadline, therefore using more cross breeds and concentrates. Smallholders are more interested in letting the animal graze rough pasture whilst enjoying experiencing animal husbandry. The smallholder's cattle are mainly for showing or just as pets because they have an iconic appearance. The members' questionnaire also supports many of the themes discussed.

Many members do not have a secure end market for their cattle resulting in them either selling it privately as boxed meat, this is generally the method used for smallholders who are able to sell a selection of joints in a box to friends or family. Alternatively, they go to a slaughter house, this is reiterating Blakey (2018. Pers comm. Mr M Blakey is a senior buyer for Dovecote Park Farm) point that he only actively procures Highland Cattle seasonally. Additionally, many abattoirs prefer not to kill Highland Cattle as the handling systems are not made for large horns, again, supported by Pickstocks, see appendix 9.2.

Unlike other native breeds, there are no schemes available Highland beef, this may deter new entrants as mentioned within the survey results by a lot of current members. These schemes are in place for Hereford cattle within Dovecote Park, Co-operative Food, Sainsburys and Dunbia all year round (Hereford Cattle Society, 2018). It was also mentioned that many of the new members don't feel supported enough by the society and would like more opportunities to express their opinions.

Additionally, the ten-year plan which was made by the society and inputs from the members has not been followed. This has not helped the society when trying to improve their service to the members.

Appendix 7 is a visual aid that has been created in order to summarise the main points that members of the society feel that they would like completed in the future. The main themes are shown below:

- More events, sales and support further south in order to meet the needs of English members
- Greater help and support for new, novice and young members
- Lower membership costs
- Greater promotion of the quality of the meat and positive attributes of the animals

## 2.4- Why do some consumers choose highland beef in preference to other breeds and are potential markets remaining untapped?

Highland cattle are known to produce some of the nicest meat in the UK. The beef is known to be full of natural flavours and tender (Jones, 2012; Cridland, 2011), with a main reason for this being the marbling within the meat (Aguonie, 2017). However, as the Highland takes so long to finish and can be the wrong classification for many markets meaning the demand for highland beef is not high alongside this the price of Highland beef can be that of a premium product, limiting the market further. (My supermarket, 2018). With this in mind the majority of Highland cattle are sold to farm shops or privately around England and Wales for a higher price. However, in Scotland there is not the large market share of premium customers, this means the consumer has to pay more for the product.

Furthermore, the current consumer is looking for more traceable food which has a point of origin. The Highland breed meets these targets as the breed is a great portrait of Scotland and is easily traceable because of the small herd size within the United Kingdom (Fresh food express, 2017). Likewise, Highland beef is proven by Bruce (2011) to have a lower level of fats and cholesterol, as well as higher protein and iron levels when compared to more commercial breeds.

The price of Highland beef is more expensive than most other breeds. Out of the top five supermarkets in the UK the only one that sells Highland beef is Waitrose (My supermarket, 2018), however, within Waitrose, only a roasting joint is sold. This is marketed at high end customers that shop within Waitrose and are willing to pay a premium. The Highland beef joint is £7 per Kg more expensive than the Hereford joint also sold at Waitrose. Moreover, all the other supermarkets which sell the same joints but don't specify a breed are £13 per Kg cheaper than the Highland joint (My supermarket, 2018). An example of Highland Beef in Waitrose seasonal range can be seen in appendix 8.

### 3.0- Research the current market of the breed

When looking into the current market of the breed it is important to include views from processors in the industry alongside the thoughts and views of the Highland cattle society members. In order to do this, three industry specialists were interviewed: Katie James from Pickstocks Telford, a family processor focussing on traceability, supplying Sainsbury's and Macdonalds (Pickstocks, 2018). Mark Blakey from Dovecote Park, the sole supplier of Waitrose throughout the UK (Dovecote Park, 2018) and Robert Phillip a society member who finishes and sells Highland cattle for other people ensuring a worthy volume goes to the abattoir whilst simultaneously killing twenty animals a year for his own outlet "Hellifield Highland Beef". They answered some questions about the breed, the full information can be found in appendix 9. Also, a section within the questionnaire was developed in order to see where the society members were sending their finished products.

Pickstocks indicated that they only buy around 100 Highland Cattle a year, making up 1% of their annual kill and this is due to the lack of availability in the area as well as them not actively procuring them. The most important factors when procuring cattle for Pickstocks are that they are farm assured and the confirmation of the animal hence tending to prefer Aberdeen Angus and Hereford Cattle, which they pay a premium for. They also have a market for over thirty month animals and stated that horned animals can also be an issue in abattoirs and during transport.

Dovecote Park process considerably more Highland Cattle than Pickstocks, taking around 500 annually, mainly for the Christmas and New Year ranges, examples of these products can be seen in appendix 8, clarifying that it is very seasonal procurement. They also procure a lot more Hereford and Aberdeen Angus cattle for Waitrose and comments that Highland Cattle are around 0.4% of their annual supply. Interestingly, Dovecote Park rank welfare standards and farm assured as the highest factor when procuring cattle. Mark Blakey also comments that eating quality is very important to them, which is an advantage to Highland Cattle, and added that to make Highland Cattle more saleable farmers could dehorn and castrate males. This is where Robert Phillip also sells on the cattle that he has finished for other people.

By talking to relevant people in the supply chain of Highland Cattle, it is clear to see that the current end market for the beef is relatively small within these two large processing companies, and this could be due to a number of reasons. Many respondents to the questionnaire indicated that they sold their finished carcasses privately, and whilst this can lead to higher prices, it does tend to prevent any extended awareness of the breed, which could be very beneficial to the society. It could also be due to the lack of supply of the breed, as many of the breeders have quite small herds, meaning that only two or three animals are killed each year.

## 4.0- The current Society use of Social Media and Website

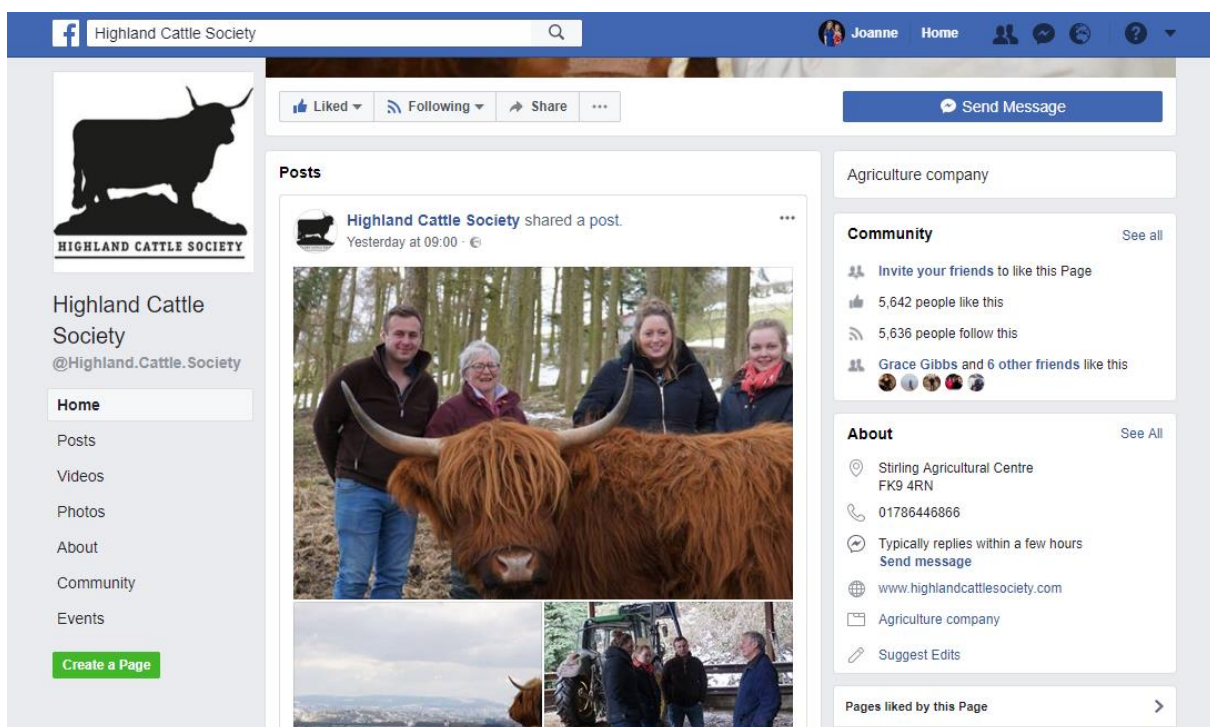
The HCS has a number of established social media platforms, however, these are not fully utilised. An important point to consider is that each platform (Facebook, Instagram and Website) use a different logo. Although these logos are similar, they do differ, as shown below in table 1. In order to improve this, and to maintain consistency, only one version of the logo should be used.

Table 1: Different use of logos

		
Facebook	Instagram	Website

(Source: Facebook, 2018; Instagram 2018; Highland Cattle Society, 2018)

### 4.1- Facebook



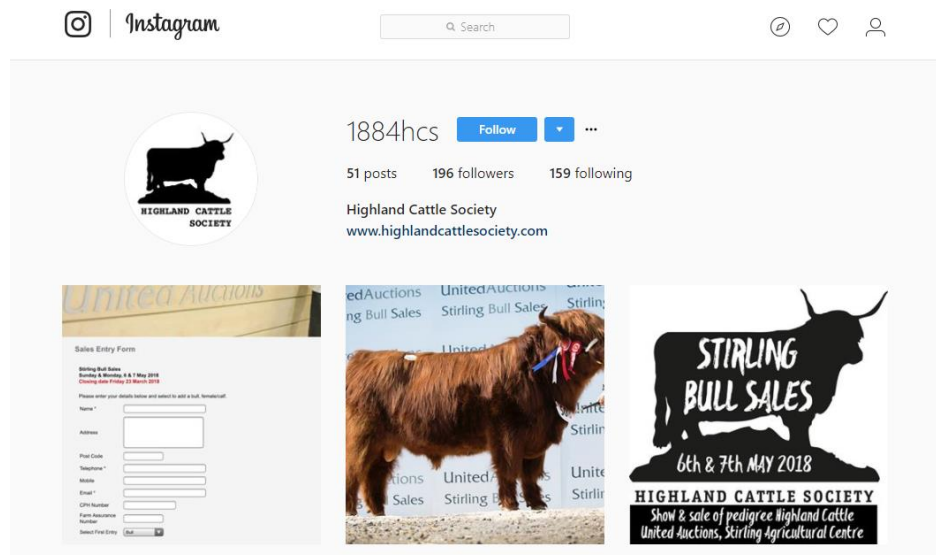
(Source: Facebook: Highland Cattle Society, 2018)

Figure 3: Highland Cattle Society Facebook

The HCS Facebook page is liked by 5,612 people and is followed by 5,602 people. The page is used on average once a week, providing members and breeders with information regarding the latest news. This page could be utilised further by more regular posts in order to improve the perception of the breed for those who are not directly involved.

Overall, the Facebook is very much member/ breeder orientated, and therefore does not look towards encouraging the consumer. However, this can be understood as members would not want a lot of information on how to cook, and the benefits of the breed, but perhaps a sister Facebook could be created for the use of the consumers.

#### 4.2- Instagram



(Source: Instagram, 2018)

Figure 4: Highland Cattle Society Instagram Page

The HCS have an official Instagram account, however this is not utilised, with only a few posts that relate only to the Oban bull sales. Having an Instagram account can allow for substantial followings, and #HighlandCattle results in over 58,000 posts/tags of images of 'iconic' cattle. If the society were to use this account for meal inspirations and tartan products, they could increase the awareness of the breed and encourage consumers to buy highland meat in promotion of the benefits.

The handle is @1884hcs which is not a representative handle for an Instagram account, users could be confused as to whether this is the official HCS account or an external party. The official website is linked to the page, which could provide assurance that the user is on the correct site. The profile also lacks a biography, which could be used to explain the society and advertise key events.

#### 4.3- Website

The website is mainly directed at HCS Members and provides all of the basic information required, however there is the option to purchase merchandise. Appendix 10 and 11 show an analysis of the HCS website, alongside the Limousin Society website. Although the Limousin society is a very different breed

in comparison to the Highland, the websites will still be used for similar purposes, therefore making this a reliable and valid procedure.

The concept of the photo gallery is a positive feature as it allows both members and non-members to visualise show results. The website considers the background of the breed, which allows potential keepers to gain background information on the breed, however this is not extensive and could be made more detailed.

The site has a naming page, which is useful to breeders. It allows breeders to choose names and maintain the Gaelic language, which ensures maintenance of the traditions and origins of Highland Cattle, this is already easy to use and therefore requires no further change.

It could be argued that this website sale page is outdated with adverts not being frequently changed. The articles are posted for three months, however some users could see this as a long time and also contemplate whether paying for a 3 month advert is worth the cost.

The pedigree registration section of the site allows quick and easy access for the members via a username and password. The fulfilment of registering a pedigree is a simple process which is a benefit of the site. It is self-explanatory and takes only a matter of minutes to complete, there is no requirement to progress through pages, and it is all one step. Members are also able to trace back families for as far as records go, which allows for progeny to be searched effectively, and other breeders to be found. However, as new data protection laws come in, this feature could be removed due to data sharing legislation.

## **5.0- Suggestions that could be developed in the future**

### **6.1- Improving the Social Media and Technology Following**

The HCS should look to improve the use of the social media platforms significantly. Estimations show that there is a projected 25% annual growth in social media over the next 5 years, making it a pinnacle industry to invest into (Growth Gurus, 2018). With the growth, comes an increased number of users, currently 1.55 billion users per month. The HCS could improve the use of the Facebook page by tailoring it more towards the general public and non-Highland Cattle farmers, in order to encourage them to purchase Highland Cattle and the meat. Evidently, there is a requirement to post information that is relevant to the current breeders, in order to ensure that they are aware of the annual shows and sales etc. however, a more balanced variety could easily be achieved.

The website again could be improved in order to allow a section aimed specifically at the consumer, alongside encouraging farmers who may be potentially interested in gaining an insight into the benefits of the breed such as the environmental factors and low cost rearing aspect.

## 6.2- Marketing to Consumers

One suggestion that could aid the increase of sales of Highland Cattle would be to market the benefits of the breed to the consumer purchasing the meat. Highland meat is a premium product, therefore the middle-upper class demographic should be targeted. The meat is currently sold during the Christmas period in Waitrose. To push consumer perception, the HCS could firstly look at moving into collaboration with, for example Waitrose or independent farm shops in order to develop a selection of recipe cards. If the consumer can see an image of an appetising meal, which specifically references the benefits and taste of HC meat, they may be more inclined to purchase a more expensive cut of meat, in order to replicate the meal.

Many smallholders also process their cattle to the consumer as 'boxed meat'. This could benefit all parties as it provides convenience for the consumer as they can purchase a variety of cuts at one time, but it also benefits the breeder as they are able to get rid of the less desirable cuts, such as mince. Mince is a low cost product, which consumers may not see any benefit from purchasing for a premium due to it usually being used within a lasagne, chilli etc. By marketing a 'meat box' more appropriately, producers are able to incorporate the mince into the box, without having to price it as a separate premium.

## 6.3- Gross Margins

The cost of production for animals is a large consideration for potential breeders, therefore, two comparative gross margins have been created in order to compare keeping a Highland in comparison to a commercial breed such as a Limousin. The relative gross margins for the differing breeds are shown in table 1 and 2.



Table 2: Gross Margin for Intensive Commercial Beef Cattle

<b>Gross margin for Intensive Beef System</b>		<b>£/head</b>
<b>Sales</b>		
Commercial Beef cattle sold deadweight @ 358kg @ £3.32/kg/dwt	£	1,341
<hr/>		
<b>Output</b>	<b>£</b>	<b>1,341</b>
<b>Purchase Costs</b>		
Commercial beef cattle bought liveweight @ 450kg	£	850
Mortality rate @ 0.9%	£	85
<hr/>		
<b>Total Purchase Costs</b>	<b>£</b>	<b>935</b>
<hr/>		
<b>TOTAL OUTPUT</b>	<b>£</b>	<b>406</b>
<b>Variable Costs</b>		
Feed	£	97
Vet and Medicines	£	10
Bedding costs	£	17
<hr/>		
<b>TOTAL VARIABLE COSTS</b>	<b>£</b>	<b>124</b>
<hr/>		
<b>GROSS MARGIN</b>	<b>£</b>	<b>282</b>

(Source: Adapted from: AHDB, 2016; AHDB Beef and Lamb, 2018; Farmers Weekly, 2018)

Table 2 illustrates the gross margin for a commercial cross animal that is averaging a grade of U3 (AHDB Beef and Lamb, 2018). In order to successfully finish commercial cattle, there are significant requirements for inputs to ensure the fastest turnaround of the animal. Products such as straw for bedding and feeding, alongside concentrates, are required within commercial finishing units. However, Highland Cattle, in most situations do not require indoor housing and are able to successfully finish on grass, hay or silage. However, this process takes a considerably longer period of time, resulting in the Highland cattle, in most situations, taking longer to finish, which causes additional costs during the slaughter process due to the requirements for over 30 month tests being conducted.

Table 3: Gross Margin to finish Highland Cattle – bought as yearlings and finished over 30 months

<b>Gross margin for Intensive Beef System</b>		£/head
<b>Sales</b>		
Highland cattle sold deadweight @ 240kg @ £3.29/kg/dwt	£	791
<hr/>		
<b>Output</b>	<b>£</b>	<b>791</b>
<hr/>		
<b>Purchase Costs</b>		
Highland cattle bought liveweight @ 275kg	£	375
Mortality rate @ 0.9%	£	38
<hr/>		
<b>Total Purchase Costs</b>	<b>£</b>	<b>413</b>
<hr/>		
<b>TOTAL OUTPUT</b>	<b>£</b>	<b>378</b>
<hr/>		
<b>Variable Costs</b>		
Feed	£	65
Vet and Medicines	£	5
Brain Stem for OTM	£	30
<hr/>		
<b>TOTAL VARIABLE COSTS</b>	<b>£</b>	<b>100</b>
<hr/>		
<b>GROSS MARGIN</b>		<b>£278</b>

(Source: Adapted from: AHDB, 2016; AHDB Beef and Lamb, 2018; Farmers Weekly, 2018; Dingwall Mart 2017)

As shown above, the gross margin for Highland cattle is in fact slightly higher than commercial finishing units, with the baseline price paid deadweight being based upon the animal grading at O4L (AHDB Beef and Lamb, 2018). Due to Highland cattle regularly finishing over 30 months, they are required to undergo a brain stem test in order to ensure that age related diseases are not present, incurring an additional cost. Highlands do not require the high levels of concentrates and feed that commercial animals do. Although it is a longer overall process, the feeding of silage, hay or straw can result in lower feed costs dependent on the cost of raw materials.

This gross margin also does not consider the aspect that Highland meat is a very healthy meat, and so therefore in some situations can be sold for a premium price to the consumer. The price shown on this margin relates to a figure taken from AHDB Beef and Lamb (2018) in April 2018, that is an average for all cattle, and not a premium.

Figures such as the ones above, should be publicised more openly to farmers in order to encourage them to utilise Highland cattle, particularly in situations where roughage is present, as Highland's are not only low cost and input, they are also a suggested breed for environmental stewardship schemes.

Evidently, all gross margins could differ depending upon the farm due to factors such as nutritional value of the forage, the genetical breeding of the animal or the seasonal effects of the weather, however, it can be concluded that these animals can be profitable even with the lengthened finishing period.

#### 6.4- Australian taste awareness grading system

In 1996 Meat Standards Australia created a taste awareness scheme changing their old fashioned grading system to a modern, consumer orientated, eating quality scheme. The grades are set from the analysis of consumer test results, and are collected from the tenderness, juiciness, flavour and overall liking of the product as shown in Figure 5 (MLA, 2011). The system was established so that farmers in Australia would sell better quality meat, rather than produce that they have to sell due to its age or other factors (Australian Butchers Guild, 2014).

**Score sheet**

**Tenderness**  
Not tender ————— Very tender

**Juiciness**  
Not juicy ————— Very juicy

**Liking of flavour**  
Dislike extremely ————— Like extremely

**Overall liking**  
Dislike extremely ————— Like extremely

Please tick one of the following to rate the quality of the beef sample you have just eaten.

Choose **one** only (you must make a choice).

- Unsatisfactory
- Good everyday quality
- Better than everyday quality
- Premium quality

(MLA, 2011)

Figure 5: Australian Taste Grading System Scorecard

Table 4 indicates what the carcass is measured on before the consumer eating quality system is used.

Table 4: Measures taken pre consumer eating quality system analysis

Factor the carcass is graded on	Explanation
Tropical Breed Content	This can have some effect on the meat and therefore needs to be measured carefully.
Ossification	Measured to determine the carcasses maturity
Marbling	Using the Meat Standards Authority grading system
Rib Fat	A minimum of 3mm is required, to ensure the carcass has adequate fat cover to protect the carcass throughout chilling
The colour of the meat	The colour of the rib eye muscle is compared to that of nationally approved standard.
Handling and transport	Animals must be handled and transported in a way which reduces stress, as stress is one of the main contributors to dark, tough meat.
pH	The pH is the measure of lactic acid in the meat, it is a key indicator of the eating quality and is measured by using a probe in the rib eye muscle.

(Source: Adapted from MLA, 2011)

Aside from this, any beef or lamb that is graded by Meat Standards Australia will have the logo shown below in Figure 6 on it, and the packaging will instruct consumers how to cook and enjoy the cut of meat, as it is believed that consumers need to be educated in order to enjoy the beef to the full potential. This is thought to increase beef sales throughout Australia, and encourage more consumers to buy better quality meat (Smith *et al*, 2011).



(Source: MLA, 2011)

Figure 6: Meat Standards Australia Taste Graded Approved Stamp

As shown in appendix 12 the current EUROP scheme used by processors in the UK does not suit Highland Cattle, and according to Pickstocks grade system, appendix 13, on the 16<sup>th</sup> of April, Highland

Cattle would be susceptible to reductions of 20p on the base price. By using this taste grading system in collaboration with a co-operative the HCS could help to stop their members incurring such reductions, and allow them a premium price for the cattle as with Herefords and Aberdeen Angus at Pickstocks UK, this would be a more equal system that would please many members who responded to the questionnaire stating that they demand a more secure market where the cattle are accepted for the breed traits.

### 6.5- Co-operative

Looking at the data from the survey the majority of members are small holders (70%) owning less than ten cattle and a large proportion of these farmers sell the meat privately to friends and family, with some selling to the local butcher. However, these sales have limited promotions and advertisement for new customers which could be considered as a factor which holds back the marketing of Highland Cattle commercially, as consumers do not often see these products for sale. Research has taken place and restaurants nationwide that have shown an interest in Highland beef, however most comment that there is not constant supply available and therefore this is a somewhat limiting factor when considering the sole use of the breed. For examples of restaurants using Highland Beef or with a Scottish theme see appendix 14.

This suggests that it would be beneficial for the HCS to appoint an in house buyer and form a co-operative that works upon a taste grading scheme, rather than the current EUROP scheme, as shown appendix 12, which causes deductions for Highland Cattle due to their conformation. If fifty small holders around the United Kingdom sold two or three animals a year to the cooperative, this would produce a more constant supply to market. This could be then sold within the United Kingdom or exported depending on the market availability and new Brexit laws. This would mean a larger number of cattle are being sold through the society and it would establish a secure, attractive, and more profitable market for the breeders, at the same time as linking the breed to large restaurants which could enhance the marketing in a non-expensive way.

Furthermore, when producing a Co-operative the supermarket or wholesaler will be able to promote Highland beef more thoroughly as they will be purchasing on a regular basis. Likewise, this will also help the society as the buyer will be doing a lot of the marketing of the breed to the consumer.

The idea of the co-operative, starts at home with the breeder/ society members, they will transport the cattle to a local slaughterhouse that is currently being used for the boxed meat, and then the carcasses transported to the larger cities where the demand is. This will make transport easier, safer and cheaper compared to transporting live animals, which will continue to add to the environmental impacts. This

could be done to reduce the damage that may be caused by the horns in transport as mentioned by Pickstocks (appendix 9.2) and less weight regulations when transporting live animals.

The cooperative will be beneficial to the farmers or smallholders that supply their beef as they will receive a premium price in comparison to selling at local auctions where prices can fluctuate. The farmer will also incur less stress of selling their beef privately and securing a market for the produce. All the transport will be covered by the cooperative so the farmer only has to concentrate on the animal which will then be sold to the cooperative per kg live weight. By using the Australian taste testing regulations it will allow for less deductions due to the confirmation of the animal, and it will help consumers, as well as the market understand the breed better, increasing the sales, and overall the awareness for both the farmers and the society.

To create the co-operative, two members of staff will be required, one is a buyer of the Highland Cattle, who ensures that the communication with the society members is strong, they are supported, and happy to keep supplying meat, as this is one of the most frequent complaints mentioned throughout the survey that the opportunities are not frequent or accessible for all of the members. This member of staff would also be in charge of transport, ensuring there is a constant supply of the meat to meet the demand of the customers and using/developing a similar Australian taste scheme. The other member of staff would be on the sales side, based around the south of England, but able to travel nationwide, this member would be in charge of securing contracts with restaurants, wholesalers and other customers. They would also be in charge of marketing of the products, ensuring that if a company is using the beef then they are advertising that they are doing so. Both of these members would need to communicate and could get a lot of marketing ideas off other breeds like the Hereford as they have advertisement at supermarkets on why to buy Hereford beef.

Furthermore, the profits made from the cooperative can be rolled back into the society and used for training the farmers to increase efficiency or finished their cattle to meet the market requirements at the same time as lowering the price of membership as many mentioned. Also to try and increase their herd numbers and margin. Likewise, the money can be used to improve the breed and genetics with the view to doing more measurements of cattle and the cooperative can help with this. When this scheme is set up, marketed, and operating efficiently it has the strong potential to attract new entrants to the breed as it is secure, suited to the breed of cattle and relatively simple, aside from this, it may have the ability to encourage farmers in the UK that currently have Highland Cattle but are not members of the society to join, as it will indicate that there is a full range of benefits. The expenses can be found in appendix 15.

## 6.6- Finance and time required to implement methods

The traffic light system below indicates a brief outline of the expected cost and timescale of the methods discussed, more detail can be found in appendix 16.

Table 5: Traffic light timescale and financial investment of implementing the discussed methods

Method	Timescale	Financial/ capital investment required	Key
Improve social media awareness	Green	Green	Green – Short term and low investment
Marketing to consumers	Amber	Amber and Red	Amber- Medium term and investment
Marketing of gross margins	Green	Green	
Australain Taste grading	Red	Red	Red- Long term and high investment
Co-operative	Amber and Red	Amber	

(Source: Authors Own, 2018)

## 6.0- Conclusion

In conclusion, there are a variety of methods that the HCS could use in order to meet the objective to increase the sales of Highland Cattle considerably throughout the Co-operative and therefore increase the breeding stock as more farmers will recognise the breed. By completing these objectives the third target of increasing the sales into the supply chain will be increased too. The methods discussed above are the ones that are believed to be the most successful and appropriate options that simultaneously satisfy a large proportion of the needs of the members too.

The suggested methods will utilise a varying amount of capital investment and time, with these proposals being highlighted in a traffic light colour coding. The easiest method that can be used, that can be an instant yet on going fix is an improvement on the social media and website aspect. The financials involved with this is the cost of admin completing more regular updates.

The co-operative again does not need to be finance heavy, it revolves around the appointment of a buyer who can form a market for a larger proportion of animals, this buyer could be paid on a commission scheme.

The taste grading scheme will however incur high initial financial aspects, and also a longer time frame due to the nature of developing the scheme, training tasters and enrolling the method out to abattoirs. However, this is a method that could improve the premium of Highlands as they will be graded for their highlighting factors, and not against other continentals which essentially lowers the price.

Overall, the HCS should seek to improve their social media and develop a pool of cattle which are graded using a taste awareness scheme in order to sell larger amounts of the animals to premium restaurants who require them.



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## Appendices

### Appendix 1: PESTLE for Highland Beef

#### *Political*

- The threat of subsidies and government support such as countryside stewardship could mean that the payments for Highland Cattle grazing less favourable areas and sites of scientific interest could be lost or at the very least reduced.
- Brexit could mean exports have increased tariffs applied to them.
- Current support for Highland Cattle on certain sites by the government is good.

#### *Environmental*

- Utilises the natural area well
- Low input animal therefore there is less food miles as no need to import concentrates to the folds.
- No need for inside housing therefore less visual pollution and electricity needed
- Less ground compaction
- Good foraging ability
- Currently most of the animals are slaughtered and sold locally therefore there isn't a lot of food miles involved.

#### *Social*

- Highland Cattle are well known across the world for originating from Scotland
- Sometimes the 'cute' image can harm the animals commercial aspects as consumers only see them as looking nice within the field rather than for consumption.

#### *Technological*

- Straight forward website in place however there is room for improvements there, for it to base for both consumers perhaps educating them into how they can cook the meat, and for society members.
- More data should be collected on live weight gains, dead weight gains, and annual turnover of folds for this to be advertised to new potential farmers.

## Appendix 2- A table comparing different native societies in the UK

Society Name	Interesting notes	Membership Prices
<b>Aberdeen Angus Society (2018)</b>	The society runs with a council overseeing a 17 regional clubs throughout the UK. The breed benefits are highlighted upon the website so potential farmers can see them. Also the letter of the year is highlighted so is easy to see and the stock needed for exports is very prominent.	Life subscription: £750 Annual subscription: £30 Junior Annual Membership: £15 Registering of animal prices are reduced by 5% when a herd is over 30.
<b>Beef Shorthorn (2018)</b>	The beef shorthorn society has a council of members from all over Britain to ensure views collected fairly. It also ensures that all of the members are familiar with beef outlets for the breed, and indicates the commercial attributes as well as the breed benefits very clearly, both in paper format and online.	Annual Membership: £30 Associate member: £15 Herd Prefix registration: £30
<b>British White Society (2018)</b>	This society focuses on showing farmers how to receive large profits from the cattle whether they are finished for breeding stock, beef, or live market trading.	Adult Member: £40 Junior Member: £20 Associate members: £20 Herd Prefix: £10
<b>Hereford Society (2018)</b>	As with other societies the breed attributes are discussed, however they are done so in a way that could be relatable to the consumer. They also list the Hereford Beef Branded Schemes for the farmers to see and	Entrance to membership: £45 Annual subscription: £65 Herd name: £30

advertise a breed plan strictly for their members.

**Belted Galloway (2018)**

The belted Galloway breed also advertises where to buy/sell meat, however this seems to mainly be through meat boxes and on-farm/ specialist butchers rather than any specialist outputs. How to become a member isn't very well advertised.

Annual Membership: £36  
Associate: £24

**Luig (2018)**

The main focus is the benefits of the breed by gender, such as their fast finishing time, and the strong confirmations. They also promote clearly their breed developments, outlets, and keep the website fairly updated.

Annual membership: £50



## Research into the Highland Cattle Society

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### Page 1: Introduction

Hello,

We are a group of six final year Agri-Business students from Harper Adams University; during our last year we have chosen to take a module called Management Consultancy Project, which this year is based on the Highland Cattle Society. To enable us to complete this project for the society we need to do a certain amount of primary research and for this we would appreciate your help. This project is in association with the Highland Cattle Society Council, with whom we are working closely.

This is a short survey that will take no longer than 5 minutes to complete and all the results will be strictly confidential. Should you wish to exit the survey at anytime you are able to do so.



## Page 2: Questionnaire

1. In order to gain a geographical understanding of where Highland Cattle are bred/reared, please provide the county for which the majority in which holding lies in. \* *Required*

2. How many years have you been a member of the Highland Cattle Society? \* *Required*

3. What type of member are you? \* *Required*

Lifetime  
 Annual  
 Associate  
 Non Member

4. How many Highland Cattle and Highland Cattle Crossbreds do you have?

	Insert number of <b>Highland Cattle</b>	Insert number of <b>Crossbred</b> Highland Cattle
Cows	<input type="text"/>	<input type="text"/>
Replacement Heifers	<input type="text"/>	<input type="text"/>
Bulls	<input type="text"/>	<input type="text"/>
Store Cattle	<input type="text"/>	<input type="text"/>
Finishing Cattle	<input type="text"/>	<input type="text"/>

5. Please rate the importance of the below features of being a member of the Highland Cattle Society

Please don't select more than 1 answer(s) per row.

	1 - Least Important	2	3	4	5 - Most Important
Ability to register pedigree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Showing opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networking with members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing of the breed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Breed improvement opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourage foreign buyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity to enter breed specific shows	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Farm Visits and advice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Source of credible/reliable breeding stock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Are you satisfied with what the society gives you as a member?

Please don't select more than 1 answer(s) per row.

	1	2	3	4	5	
Very Dissatisfied	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Very Satisfied

7. From your experience and knowledge, what would you like to see the society do for you?

8. What sort of Highland Cattle breeder would you class yourself as? select all that apply

Commercial suckler herd

Pedigree suckler herd

- Smallholder/ Crofter
- Pedigree finisher
- Non pedigree finisher

8.a. Other

9. Would you be willing to submit data on the following?

	Yes	No
Live weight gains	<input type="radio"/>	<input type="radio"/>
Killing out percentage	<input type="radio"/>	<input type="radio"/>
Dead weight	<input type="radio"/>	<input type="radio"/>

10. What is the future commercial potential for the breed?

Please don't select more than 1 answer(s) per row.

	No potential	Not much potential	Not sure	Some potential	Strong future potential
Value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. How do you see the commercial value of the breed being improved?

12. Rate how important the following Unique Selling Points are in the Highland Cattle:

Please don't select more than 1 answer(s) per row.

	Not important	Not very important	Neither important or unimportant	Very important	Essential
Environmental Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Healthy Meat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Iconic Breed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Low Input	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grass Based System	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. Are there any other benefits of Highland Cattle?

14. How important do you feel the following are for the future of the breed?

Please don't select more than 1 answer(s) per row.

	1 - Not important at all	2	3	4	5 - Very important
Exports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Breed improvement program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Niche, high value product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Benefit of the Highlander as a suckler cow for X bred cattle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. Would you benefit from marketing the Highland Cattle Meat with a Traditional Speciality Guarantee (TSG) to achieve a premium price? A TSG is a recognised quality assurance mark that emphasises that a product is produced in a traditional way ,e.g. grass reared. This is similar to a PGI (Protected Geographical Interest) for Melton Mowbray Pork Pies, however there is no location requirements for TSG's

Yes

No

16. What is the end market for your Highland Cattle?

- Private buyer
- Pedigree sales
- Direct to the consumer
- Finishing unit
- Direct to processor
- Own Farm Shop
- Not considered

17. We are interested in your views on crossbred Highland cattle and would like your views on attending sales with a view to buying or selling these cattle.

	Central England		Scotland	
	Heifer Crosses	Steer Crosses	Heifer Crosses	Steer Crosses
Attendance with a view to buy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Selling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Appendix 4- Questionnaire Results

## Appendix 5- SWOT Analysis of the HCS

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Have a ten year strategic plan that covers different objectives</li> <li>• Website good for breeders to be able to see events and learn about news</li> <li>• Members area of the website is very simple and easy to use.</li> <li>• Maintaining membership numbers</li> <li>• Following up leaving members to see why they haven't re-joined the society</li> <li>• Members are very passionate about the breed and this shown throughout the welfare of the animals</li> <li>• Sales and fold visits are very well advertised throughout the members and lot of these enjoy this opportunity to show their cattle and network with other members.</li> <li>• A good range of resources is available on the Internet for members.</li> </ul>	<ul style="list-style-type: none"> <li>• Commercial and small holding brings conflicting views which means that the council struggle to please all of the members</li> <li>• If consumers view the website they will have difficulty understanding it as it is aimed at the breeders.</li> <li>• Logo is not consistent across all the social media, and the social media isn't regular enough.</li> <li>• People leave the society each year.</li> <li>• Ten-year plan isn't followed meaning that it is very confusing for members and the council to see how to move forward with the society.</li> <li>• New members do not feel as supported as they would like too.</li> <li>• Current members do not have an outlet for beef; therefore it will be off putting to any farmers thinking of starting in the breed.</li> <li>• Large horns can restrict the market and abattoirs used</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Social media and the website could be used a lot more efficiently for both members and consumers, this is free marketing and needs to be utilized more.</li> <li>• Breed improvement plan could help to ensure the same high quality throughout all the animals registered with the Highland Cattle Society</li> <li>• Data collection on the live weight gain, and dead weights</li> </ul>	<ul style="list-style-type: none"> <li>• The meetings, sales and support aren't wide spread enough to support all of the members, this could mean that members in England are lost due to them feeling neglected.</li> <li>• The finances of the society that the teams have seen are very confused and unreliable, these need to be improved rapidly to avoid any monetary problems.</li> </ul>

- Stronger marketing could be created in order to increase the number of farmers that breed Highland Cattle
- Taste grading system as done in Australia as part of a co-operative idea
- Co-operative as numerous responses from the survey suggested that they have outlets for their beef when it is finished such as restaurants in London, but they do not have enough supply
- Health associate with the meat could be exploited more in the market, as consumers are becoming very health aware.
- Find what members want from the society and act on what they say, as the society is providing them a service.
- Establish the trademark to ensure all finished beef is the same when marked
- Sister website for consumer could be an option to teach the consumers about the breed, this may make people want to buy Highland Beef over other more common breeds.
- Cross bred potential to make a more commercial animal
- Find a outlet for the beef, perhaps when acting as a co-operative, the cattle could be collected together and sold through one person or outlet to a secured market.

- The marketing of both the breed to farmers, and the beef to consumers is not strong enough. This needs to be acted upon to ensure that the small amount of demand that is currently there isn't lost.
- The membership fees are considerably higher than other native breeds, without any more benefits; this could potentially put members off joining the society.



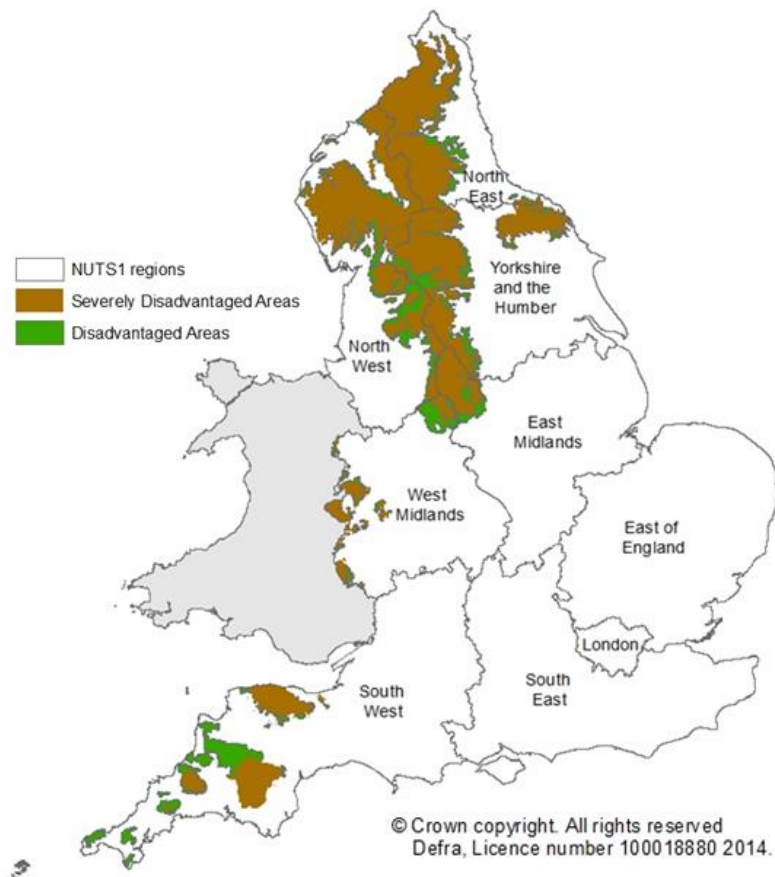
## Appendix 6- The Benefits of the Breed

Analysing the data recovered from the survey the members of the society have highlighted some key areas in which they think the breed has potential. The three main groups mentioned in this are section; Inputs, Highland Cattle attributes and conservation techniques.

Highlands are a low input breed which have a good food conversion rate as mentioned by the society members in the survey. The majority of the members discussed the good foraging ability of the Highland Breed, stating that they are able to successfully finish on poor land. However, a lot of the members have mentioned low feed inputs, indicating that the cattle do not need to be finished on high levels of concentrates.

Highland cattle have some good breeding qualities, which are very favourable when coming to cross breeding and animal selection. Some of the best attributes of the Highland cow is the good mothering ability and easy calving that can save farmers money in both veterinary costs and time. (AHDB, 2010) Therefore due to the nature of the HCS members, with many being smallholders/crofters, it is a good breed for those who have a shortage of space and less experience with agriculture. Likewise, the Highland is a very hardy and docile breed which helps in the harsh winter conditions. All these traits are beneficial and should be promoted frequently to farmers which may cross them with another breed to get hybrid vigour.

Conservation grazing in the United Kingdom is a sustainable way of managing less favourable areas. Defra published a map of areas with poor soil and vegetation, see figure 5 below, which illustrates these areas within the UK, where native breed grazing is encouraged (Farming Statistics DEFRA, 2017).



(Source: Farming Statistics, Department for Environment, Food and Rural Affairs, 2017)

*Figure 7: Severely Disadvantaged Areas and Less Favourable Areas within the UK where native breeds are recommended for grazing*

The majority of these areas are grazed by farmers to help manage the land. For example, the natural England may have some conservation land that needed to maintain. Natural England (2013) conservational grazing can only be done with native breeds. However, they prefer Highlands to graze these areas. The main reason for this is the foraging ability and less impact on the surrounding areas through grazing. This has helped highland cattle to become more prominent in certain areas around the United Kingdom and there is still large areas that Highland breeders or the society could target to increase their numbers.

Appendix 7- Word Cloud illustrating what current members want from the society



Appendix 8- Example of highland beef in Waitrose

The screenshot shows a product page for 'Highland beef sirloin (1.3kg-1.9kg)'. The product is priced at £55.08 each, with a unit price of £28.99/kg. A message indicates that the item is not available. The page includes a description of the beef, stating that it is renowned for its tenderness and is specially sourced for Christmas. The page also features several icons: 'Requires cooking', 'Suitable for freezing', 'Seasonal', and 'Waitrose own label'. There is also an 'Add to favourites' button and a 'Be the first to review' prompt.

## Appendix 9- Questions and responses from people working within the beef supply chain

### Appendix 9.1- Response from Katie James at Pickstocks Telford



**1. How many highland cattle do you buy annually?**

We do not buy more than 100 of these cattle annually.

**2. Is this due to market demand or the availability of the animal?**

The animals are not readily available to us in this area, most travel from further afield e.g. from Scotland. We don't actively procure them, as we have no reason to specifically look for these cattle, we do not pay any premiums on these cattle, as there is no market demand for these with any of our customers.

**3. What do Highland cattle grade like?**

Highland cattle grade in terms of conformation: -O's to R's, with a majority being O+'s. In terms of fat class, if they are fed well, they usually have a good covering of fat on them so 3/4L and richer.

**4. Do you buy any other native breeds?**

We do buy other native breeds, particularly Aberdeen Angus and Hereford, which we have demand for and are able to pay a premium on these cattle.

**5. What is your percentage of highland cattle compared to these native breeds?**

Highland cattle make up 1% of our total native kill, at most.

**6. Would you say that the percentage of Highland cows that you are killing is growing?**

The number of highland cattle we kill is not growing.

**7. What do you look for when buying beef cattle? Please rank in order, 1 being most important and 5 least important.**

Factor	Rank order
Confirmation	2 (more important for the market)
Breed	5 (we have different markets for different breeds and effectively a job for everything, so plainer cattle have a different job to the continental cattle, so breed isn't such an issue to us)
Farm Assured	1 (Price deductions are implemented for any cattle that aren't farm assured)
Welfare standards	3 (welfare of cattle is usually high when farmers are assured)
Age	4 (because a large proportion of our cattle are over 30 months, we have a job for OTM and UTM, so age isn't such an issue for us)

**9. What could the highland breed do to be more commercially competitive?**

The reasoning behind our small numbers of intake of Highland cattle is:

- The difficulties in the cattle fitting in our race due to the size of the horns
- The long distances that the cattle have to travel, again this is made more difficult by the horns
- There not commercially produced on any large scale to ensure consistent production numbers
- The thick coats are more suited to outside more harsh environments, and therefore these cattle struggle with health issues such as pneumonia when kept indoors and commercially finished.
- Continental cattle have higher meat yielding potential.
- The figures I have quoted will be 95% cows (over 30 months of age) not prime beef.
- The nature of the breed means that they are not as well suited to commercial production, and therefore I am not sure that there is a simple solution to the breed becoming more commercially competitive at this moment in time.

Appendix 9.2- Response from Mark Blakey at Dovecote Park Farm



**1. How many highland cattle do you buy annually?**

Less than 500 Highland Cattle

**2. Is this due to market demand or the availability of the animal?**

We only buy what we need and currently we only use Highland Cattle in the Christmas/ New Year ranges, therefore we only buy what we need for our market.

**3. What do Highland cattle grade like?**

75% O grade and 25% R grade

**4. Do you buy any other native breeds?**

Yes, Hereford and Angus in large amounts but they are totally different cattle to the highland.

**5. What is your percentage of highland cattle compared to these native breeds?**

0.4% is our annual output from Highland Cattle

**6. Would you say that the percentage of Highland cows that you are killing is growing?**

No it is a static requirement.

**7. Is the highland meat used for a premium product? (e.g. Waitrose Christmas range) If so, what cuts?**

We do not stick to particular cuts; we use the whole carcass, the hind and forequarters.

**8. What do you look for when buying beef cattle? Please rank in order, 1 being most important and 5 least important.**

Our producers have to comply with all the facts you have listed-all equally important you cannot supply us if not adhered to. Eating quality is also very important to us.

Factor	Rank order
Confirmation	5
Breed	4
Farm Assured	1
Welfare standards	1
Age	3

**9. What could the highland breed do to be more commercially competitive?**

The breed is unique in hardiness and will survive extreme conditions. E.g. outwintering, low cost system, it may also be advantageous to consider EBV's for growth etc. De-horning and castration of males would help make a more saleable article for selling as finishing cattle.

### Appendix 9.3- Case study of Robert Phillip- Hellifield Highland Beef

Robert finishes and sells Highland Cattle for other people that have one or two animals and then he sells them onto the abattoir. He supplies Dovecote Park, and sent 119 last year throughout the Christmas period. He then sent 19 more animals three weeks after New Year as part of their normal beef scheme. After this he indicates that there won't be a supply throughout Waitrose, and it is an easier option to sell them to Dovecote Park as they buy the entire animal, unlike through his own outlet when people buy the more favourable cuts.

For his own outlet he kills twenty animals a year, but it is difficult to sell the whole animal, this is due to people being able to buy items such as mince anywhere. This is harder work, but obtains a higher price than Waitrose.

He claimed that the way to increase a minority breed is to kill it and increase the supply and demand because if 80% of highland cattle dropped dead tomorrow it wouldn't affect anyone drastically in terms of finance due to it not being their main money earner.

He is going to write a piece for the HCS newsletter about de horning. He de horns all of his at a young age and then they're easier to handle and more valuable due to horns weighing up to 100KG. Robert also seemed frustrated at people within the society not knowing how to look after them and then moaning at the price they pay for them. Perhaps suggesting education could be useful.

He has had people ask him what he does with his highlands; people do not have the link between highlands and meat so he agrees that the general public need educating through marketing. He's also had people come into his own shop and think that pictures of highlands are Angus's. Even with the meat right in front of them, beside a picture of a highland cow, they still can't make the link.



## Appendix 10- Website analysis of the Highland Cattle Society Webpage

Good use of logo – easily recognisable however it could be quite 'clumsy'

Very general information, maybe not the most helpful either – 'Beef' What is this?

Very simplistic webpage header, however it is functional

Easy member access from homepage for members to complete registrations

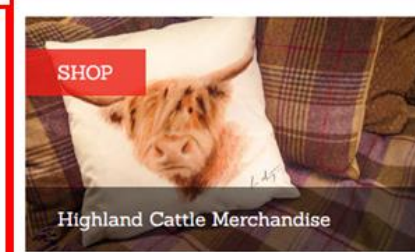


Would this area of the homepage be better utilised for sale information/ breed information etc.?



White back drop allows images and information to stand out, however could consider an image or pattern or colour

Colour use is consistent – good branding



Illustrates social media presence, however these platforms are not utilised as effectively as they could be

Automatically drawn to 'shop' – is this really a priority for the homepage?



Allows user to search for cattle easily – good for breeders

(Source: HCS, 2018; Authors Own, 2018)

Appendix 11- Website analysis of the Limousin Society website as a competitive comparison

Clean and crisp use of colours, matches branding

Each section that a user may need is clearly identified

Specific section for young breeders – helping the future generation

Easy access to semen website for those looking for new bulls

Very crisp use of logo – easily recognisable and compact

Search button – convenience for users – do not have to link through the entire site

Attractive edge of page with 'Limousin' font - branding

Attractive background even if not much is visible

'Trending Now' – shows the current most searched/ demanded by users

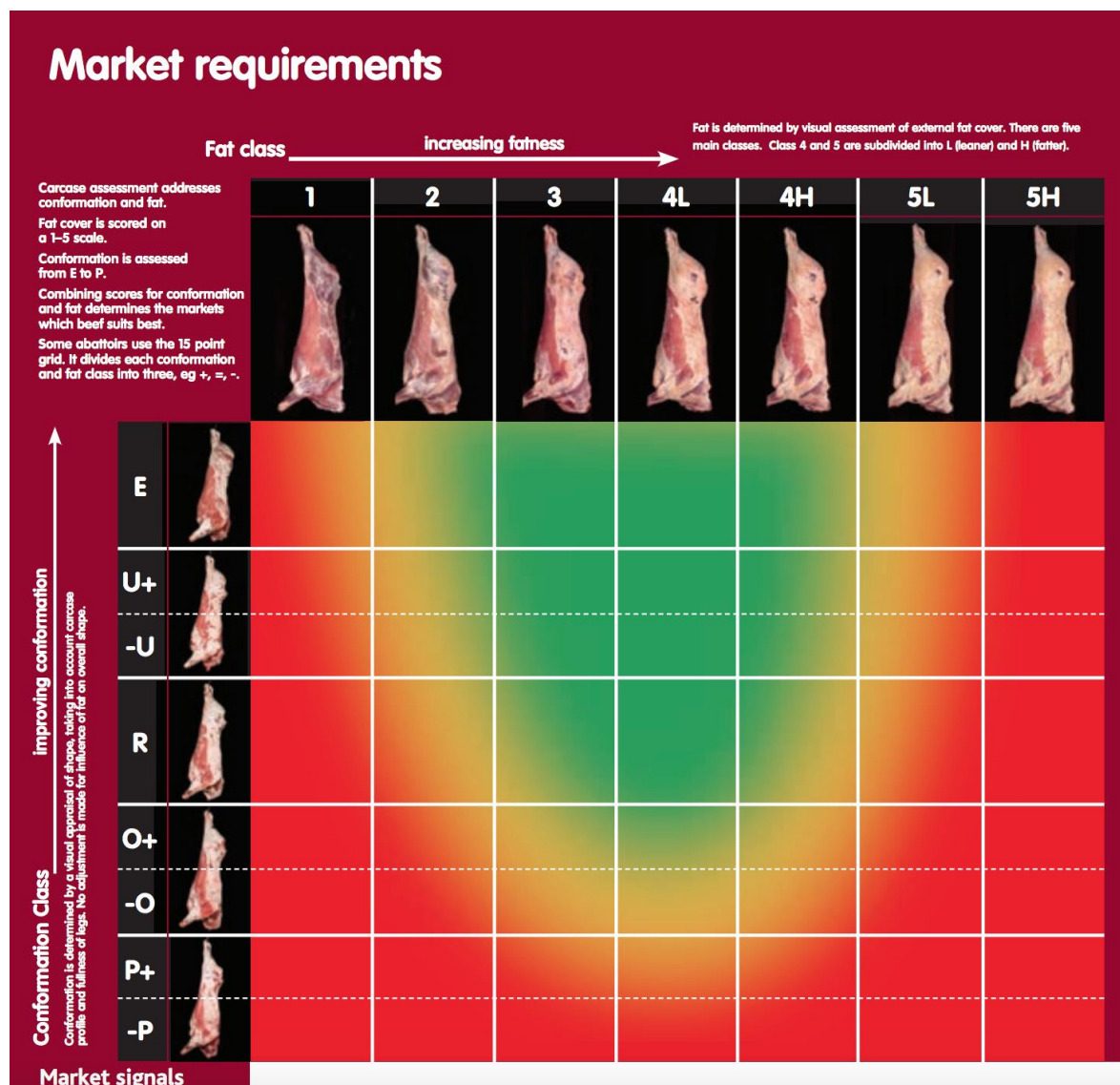
Good use of homepage for key information about sales, top cattle etc.

Regular updates of the site

The screenshot shows the website header with the date 'Saturday, April 21, 2018' and navigation links: 'Media & News', 'Shop', 'Contact', 'Links', and 'Staff Login'. The main logo features a bull and the word 'LIMOUSIN'. To the right is a banner for 'semenstore.co.uk' with the tagline 'quality semen on-line' and a sub-header 'Practical one-stop Limousin semen shop' with the URL 'www.semenstore.co.uk'. Below the header is a yellow navigation bar with links: 'HOME', 'NEWS', 'SOCIETY', 'BREED', 'BREED IMPROVEMENT', 'PROJECTS & INITIATIVES', 'SALES, SHOWS & EVENTS', and a search icon. A 'YOUNG BREEDERS' dropdown menu is also visible. The main content area features a 'TRENDING NOW' section with the text 'Catalogue now available for Newark Sale 21st April 2018'. Below this are two large images: one of a brown Limousin bull and another of a black Limousin bull being led by a person, with the text '2018 ANOTHER RECORD SMASHING DAY FOR LIMOUSIN' overlaid on the second image.

(Source: Limousin Society, 2018; Authors own, 2018)

## Appendix 12- EUROP Scheme used within many abattoirs



(AHDB Better Returns Programme, 2015)

Shown above is the general classification system for the UK, this indicates that E, U, and R are the best classification at 3, 4L, and 4H, this is where some breeds meat, such as Hereford and Aberdeen Angus, however the Highland frequently struggle to meet this classification before 30 months of age.

Dovecote Park and Pickstocks indicated that the majority of Highland Cattle reach O+ but generally have a good fat covering of 3, showing that the grade is in the amber light rather than the grade, and this is one of the reasons that Australian Taste Grading system has been mentioned.

## Appendix 13- Pickstock Telford LTD Price sheet for Prime Cattle based upon EUROP

**270 to 420 UTM Grid**

	2	3	4L	4H	5L
<b>E</b>	-0.20	+0.20*	+0.20*	+0.10*	-0.20
<b>U+</b>	-0.20	+0.15*	+0.15*	+0.05*	-0.20
<b>U-</b>	-0.25	+0.10*	+0.10*	BASE*	-0.25
<b>R</b>	-0.25	BASE*		-0.05*	-0.25
<b>O+</b>	-0.40	-0.10*	-0.10*	-0.15*	-0.40
<b>O</b>	-0.60	-0.35	-0.35	-0.45	-0.60
<b>P+</b>	-115.00	-90.00	-90.00	-90.00	-115.00



Katie James  
 Prime Cattle Procurement  
 Tel: 01352 605900  
 Mobile: 07946 155231  
 Email: katiej@pickstocktelford.co.uk  
 Web: www.pickstocktelford.com

KG			
<b>240</b>	to	259.9	-0.50
<b>260</b>	to	269.9	-0.15
<b>270</b>	to	419.9	Base
<b>420</b>	to	439.9	-0.25
<b>440</b>	to	459.9	-0.50
<b>460+</b>			-0.70

CATEGORY	AGE	GRID
Steers & Heifers	Under 30 Month	Base
Steers	Over 30 under 36 month	-0.10
Young Bull	Under 16 Months	-0.15
Aberdeen Angus*	Under 30 Month	0.25
Hereford*	Under 30 Month	0.15

60 Days on last Holding

4 Holdings 3 movements (excluding market movements)

\* Indicates breed premium paid only on these grades and must be accompanied by relevant declaration form

(Pers Comm. James, 2018. Miss K. James is a cattle buyer for Pickstocks, Telford)

The base price for the week commencing on the 16<sup>th</sup> of April was 360p, therefore as shown with the grades above predicted by Dovecote Park and Pickstocks, most highland cattle are likely to be deducted 10p for the confirmation of the animal, and 10p for the age of the animal, indicating that a taste grade system throughout their own cooperative would help the HCS members achieve better prices. This also indicates a premium of +25p for Aberdeen Angus, and of +15p for Hereford Cattle.

Appendix 14- Examples of high class restaurants focusing on Highland Cattle or Scottish produce.

Restaurant	Location	Information
<b>Highland Steakhouse (2018)</b>	Broxbourne, Hertfordshire	Finest steaks from Highland Cattle in the heart of Scotland.
<b>Highland Angus Steakhouse</b>	Southgate, North London	As given away in the name, they use both Highland and Angus steaks, when asked why they commented that there isn't a large enough supply of Highlander to keep up with demand.
<b>The Torridon (2018)</b>	Wester Ross, Scotland	Rear their own Highland Cattle for their hotel and restaurant, indicating that there is a demand for AA Rosette restaurant.
<b>Belle House Restaurant (2018)</b>	Worcestershire	The beef gives us high quality, assurance and full traceability.
<b>Mac &amp; Wild (2018)</b>	Two restaurants in London	Their catchphrase is 'showcasing the best of Scotland's produce' including game, and beef. Could be used as a starting point.
<b>Irvin Bar Grill</b>	London	Uses all Scottish beef for their Scottish themed business.
<b>Dram &amp; Smoke</b>	London (Pop-up restaurant)	Serves seasonal Scottish produce.

(Source: Authors own, 2018)

## Appendix 15 – Co-operative Margin

### Appendix 15.1 - Purchasing cattle under 30 months

All weights based on an average across 100 cows

	<b><u>Under 30 months</u></b>	
	Per cow	100 cows
<b><i>Income</i></b>		
<i>Carcase sales</i>	£1944	£194400
<i>Skin sales</i>		£ 0
		£ 0
<b><i>Total</i></b>	<b>£1944</b>	<b>£194400</b>
<b><i>Expenditure</i></b>		
<i>Staff</i>	£600	£60000
<i>Haulage</i>	£140	£14000
<i>Live cow</i>	£810	£81000
<i>Slaughter</i>	£100	£10000
<i>Advertisement</i>	£50	£5000
<i>Staff travel cost</i>	£100	£10000
<i>Packaging</i>	£30	£3000
<b><i>Total</i></b>	<b>£1830</b>	<b>£183000</b>
<b><i>Margin</i></b>	<b>£114</b>	<b>£11400</b>

(Source: Authors Own, 2018)

## Appendix 15.2 – Purchasing Cattle Over 30 Months

All weights based on an average across 100 cows

<i>Over 30 months</i>		
	<i>Per cow</i>	<i>100 cows</i>
<b><i>Income</i></b>		
<i>Carcass sales</i>	£2112	£211200
<i>Skin sales</i>		0
<b><i>Total</i></b>	<b>£2112</b>	<b>£211200</b>
<b><i>Expenditure</i></b>		
<i>Staff</i>	£600	£60000
<i>Haulage</i>	£140	£14000
<i>Live cow</i>	£900	£90000
<i>Slaughter</i>	£140	£14000
<i>Advertisement</i>	£50	£5000
<i>Staff travel cost</i>	£100	£10000
<i>Packaging</i>	£30	£3000
<b><i>Total</i></b>	<b>£1960</b>	<b>£196000</b>
<b><i>Margin</i></b>	<b>£152</b>	<b>£15200</b>

(Source: Authors own, 2018)

## Appendix 16- Expenses and timescale of proposed ideas

<i>Idea</i>	<i>Cost</i>	<i>Timescale</i>
<b><i>Social media enhancement</i></b>	<b>Low cost activity:</b> Sponsored Facebook Posts cost around £4 a week. (Facebook Business, 2018) Marketing officer already in place just needs more directing and perhaps a training course in affect use of social media for marketing could be useful. £49 including VAT. (Reed, 2018)	<b>Short term:</b> Can be done within 4-6 weeks, with the correct line of focus.
<b><i>Marketing to the consumer</i></b>	<b>Low/ Medium cost:</b> Recipe cards- £25.66 for 1000 units but would need designing by the marketing officer and approving by the council. (Vista Print, 2018)	<b>Medium term:</b> Designing can take time but two months max before they are published.
<b><i>Australian Taste Grade System</i></b>	<b>High Cost:</b> Initial set up costs will be high, and once scheme is implemented it will be a low cost. Training required for graders and taste groups required for consumers, costs currently unknown. Budget: £5000.	<b>Long term:</b> Could take time to train and run focus groups as well as perfecting the scheme. 1 year.
<b><i>Co-operative</i></b>	<b>Medium cost:</b> Appointment of two new staff members but these could be established on a commission based purpose, due to the amount of sales received. See appendix 15 for the full breakdown.	<b>Medium term:</b> Finding the right employees could take time, and also finding the clients could.



## Appendix 17- Milestone Emails

### Appendix 17.1- Conference call round up

From: Joanne Gregory

Sent: 19 January 2018 14:30

To: Jacky Harrison

Subject: RE: Tonights Meeting

Good afternoon Jacky,

We are planning to compile a summary of what was discussed last night at the beginning of next week. Once this has been completed, we will send it over to you.

We would all just like to thank you and the others for giving up your time to speak to us, it has provided us with the initial information that we need to start our project, and it is greatly appreciated.

Thank you again,

Kind regards,

Joanne

From: Jacky Harrison <jackyharrison51@hotmail.com>

Sent: Thursday, January 18, 2018 10:15:41 PM

To: Tom Thomson; Craig Finnie; Hugh Hoather; bruce@culfoichfarm.com; chazz125@hotmail.com; David Hyland

Subject: Tonights Meeting

Hi All

Thanks for your attendance and input this evening. Sorry for the delayed start. I should have checked that all was OK beforehand so sincere apologies for the delayed start.

I hope it was useful to the Harper Adams team.

I will forward the job descriptions to the team. Tony and teams – please feel free to contact me whenever you feel it is necessary.

Jacky

Appendix 17.2- Idea proposal

**From:** Joanne Gregory [<mailto:14042600@live.harper.ac.uk>]

**Sent:** 12 March 2018 15:31

**To:** Jacky Harrison <[jackyharrison51@hotmail.com](mailto:jackyharrison51@hotmail.com)>

**Subject:** MCP Update

Hi Jacky,

I trust that you are well.

I thought that I would just give you a quick update regarding how my team (Grace, James and myself) are getting on.

As you know, the survey is collecting responses successfully and we are currently at 61 responses, which we believe is a fantastic achievement for the short space of time that it has been launched. We have emailed Gavin Hill this morning at SAC and also QMS, however we are waiting to hear back from these.

We have now fully emerged ourselves into the questions and points that we are required to answer, and have started market research and investigations into the markets etc. From this investigation, I have a quick question regarding the website and social media platforms. I was wondering what the Instagram account name is/ if there is an official Instagram page for the society. I was also wondering whether there would be any chance of us gaining access to the members area of the website, are you able to give us a temporary username and password in order for us to look at the user experience for members/ what that access provides?

I hope that you are able to aid our team with the couple of queries that we have.

Kind regards

Joanne

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**From:** Jacky Harrison <[jackyharrison51@hotmail.com](mailto:jackyharrison51@hotmail.com)>

**Date:** Monday, 12 March 2018 at 17:04

**To:** Joanne Gregory <[14042600@live.harper.ac.uk](mailto:14042600@live.harper.ac.uk)>, "[Craig@Finnie4x4.Com](mailto:Craig@Finnie4x4.Com)" <[Craig@finnie4x4.com](mailto:Craig@finnie4x4.com)>

**Subject:** RE: MCP Update

Craig – can you answer Joanne about instagram account – I didn't think we had one. Also I wasn't aware there was a members only area on the website apart from registering cows on the database. Please enlighten us!

And both – the survey should be going out tomorrow via mail chimp to the whole of HCS (David needed Janet to help him.)

Lets hope this gives a big boost.

J

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**From:** Craig Finnie <[Craig@finnie4x4.com](mailto:Craig@finnie4x4.com)>

**Sent:** Monday, March 12, 2018 6:24:06 PM

**To:** Jacky Harrison; Joanne Gregory  
**Subject:** Re: MCP Update

Hi Joanne,

Yes I started an Instagram account @1884hcs and asked the previous secretary to use it...she ignored it. I did use it for the promo of Oban sales and other bits since and see it as a valuable tool.

Members area, I assume you mean within the database for registering cattle etc? I will ask tomorrow about a password for you to have a look. I would love to hear your feedback on the website in general, there is a lot of work to be done there!

Best Regards

Craig

---

**From:** Joanne Gregory <14042600@live.harper.ac.uk>  
**Sent:** 14 March 2018 12:17  
**To:** Craig Finnie <Craig@finnie4x4.com>; Jacky Harrison <jackyharrison51@hotmail.com>  
**Subject:** RE: MCP Update

Hi Both,

Thank you for your reply, I had discovered the Instagram page and wanted to ensure that it was the official one, so thank you for the clarification on that. If we are able to get a password at all that would be fantastic, would increase our ability to evaluate the user experience and ease of the cattle registration.

We have considered the brief set and looked at some market research, as well as the survey responses so far (111 at present) and we feel that building upon the marketing of the breed as well as looking at accreditation of the animals and also perhaps looking into the possibility of an Australian based taste grading scheme for the beef within the supply chain. We feel this will lead to increased promotion and knowledge of the breed within the consumers, and from that increased demand for supply of highland cattle and therefore membership numbers.

The information provided by the members has been incredibly detailed and given us ideas of how the society could make it better for them, as well as some detail of what they feel would boost the breed. We felt that it would be helpful to touch base with you regarding this plan to steer our project towards the marketing path including social media, and the current website, whilst looking at the other factors mentioned above. Could you confirm whether this is something you feel would be an interested in us investigating?

If you could provide some feedback on your views of our plans, that would provide us with confidence that we are not heading in the wrong directions and therefore not meeting your understanding of what you want from this report.

We look forwards to hearing from you soon,

Kind regards,

Joanne

---

Jacky Harrison <jackyharrison51@hotmail.com>

Wed 14/03, 13:46

Hi Joanne (and all)

I think what you are thinking about is definitely in the right direction and particularly boosting the profile of the breed. Is this just your teams thoughts or both teams?

I have copied in Tom (who you met) former president, Gordon (current president) and Jim (vice president) for their comments, and the new Breed Promotions Officer. - Charlie

111 responses is great, I am really pleased. I think even having the survey has boosted the credibility of the society in the eyes of the members. Well I hope so! Lets hope a few more will come in after the mail chimp yesterday and the newsletter 'advert'. All comments all welcome negative and positive, especially if they come up with how we can improve. I will let you know when the newsletter has been published.

I will see if there is anybody relatively local who can show you how calves are registered, unfortunately we have just registered ours, one cow left to calve, if all else fails I can come up and at least show you the screens.

Don't forget if you want to come and visit us we are an hours drive away. (Well unless it snows again and then we are cut off).

Jacky

01588 630666

Joanne Gregory

Wed 14/03, 14:00

Hi **Jacky**,

This is just our teams thought, apart from the survey we are now working completely separately in order to complete this project.

Any feedback from Tom, Gordon and Jim would be greatly appreciated as inevitably we are working in order to benefit you and the society, so we are keen to ensure that what we create is the correct thing.

That would be great if we could at least have a look. I imagine it will be a similar process to other breed society registration sites, however we are keen to look at the usability aspect of it if possible.

We have just spoken and we do feel that as a team it would be beneficial to come and see you if that would be possible? We leave Harper for Easter next Friday for a month, and then the deadline is straight after we come back so would you have any time for us to maybe pop down next week?

Thank you for the feedback and assurance that we are working along the correct lines

Kind regards,

Joanne, Grace and James  
Sent from [Mail](#) for Windows 10