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Highland Cattle Society Project

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**Harper Adams  
University**



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**Highland Cattle Society**

# The Team – For the Benefit of the Highland Cattle Society

The team that have created this management consultancy project are all final year students studying Agri-Business (Hons) at Harper Adams University; choosing this optional module due to an interest in business management. Overall the team has a diverse range of backgrounds and experience which can be drawn upon to advise the Highland Cattle Society.

## **Rachel Croker (Team Leader) -**

Rachel grew up in Hertfordshire and has some farming experience within the arable industry. On placement at Wilson Wraight Agricultural Consultants there was exposure to livestock. However, the experience was largely farm business management covering; management budgets and reports, legal agreements, subsidy applications and recruitment campaigns. Also draws on experience in sales, agricultural bank management and starting a small enterprise at Harper Adams. After graduating Rachel shall be returning to Wilson Wraight.

## **Jack Davis -**

Jack is originally from Kent from a non-agricultural background. He has experience in the beef, sheep, dairy and arable sectors of UK agriculture and has his own small herd of pedigree British Blonde cattle. On placement he worked at Vexour Farm which runs pedigree Aberdeen Angus, Charolais and Hereford cattle and helped him gain further knowledge of beef production systems including a trip to Scotland to see several farmers including Scotland Beef Farmer of the Year, Robert Parker. After graduating Jack will be joining Bidwells in Cambridge as a Graduate Agribusiness Consultant.

## **Sarah Dean –**

Sarah grew up on an arable and free-range poultry farm in Yorkshire. She has had many seasonal jobs working for companies such as McCain Foods, Frontier Agriculture and Dunns (Long Sutton) Ltd. After graduating from Harper Adams, she hopes to secure a job as a fieldsperson. She recently was awarded the bronze award at the Pinnacle Awards, hosted by The Farmers Club in London. The award consisted of creating a feasibility project for a diversification option of her choice. She has held many roles in Young Farmers, where she has been able to demonstrate skills of organisation, punctuality, delegation and public speaking.

We hope that the Highland Cattle Society find this project beneficial and the recommendations useful to the societies future direction.

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Robert Philip, Hellifield Highland Beef – for taking the time out of his day to share his knowledge and experiences with us.

And to all those who took their time to participate in the initial Skype project discussion.

## Abbreviations

AHDB – Agricultural and Horticultural Development Board

BSE – Bovine Spongiform Encephalopathy

DEFRA – Department for Environment, Food and Rural Affairs

EU – European Union

HCS – Highland Cattle Society

OECD – Organisation for Economic Corporation and Development

PR – Public Relations

QR – Quick Response

RBS – Royal Bank of Scotland

TB – Tuberculosis

TSG – Traditional Speciality Guaranteed

UK – United Kingdom

UKAS – United Kingdom Accreditation Service

# Executive Summary

This report aims to provide the HCS with recommendations on how to increase sales of Highland cattle. Through reviewing the current society, wider macro-environment and supply chain to find a more commercially viable direction for the Highland cattle.

The recommendations to meet the aim, endeavour to be achievable by developing what the society currently does, while building on the member's opinions for the future direction. The overall recommendation is primarily to increase the numbers of cattle of current member's by increasing returns, meaning they will be perceived more economically worthwhile and will gradually increase numbers. Secondly targeting wider cattle sales to farmers with marginal land, who may be looking to replace lost post-Brexit subsidies income.

This is recommended to be done through increased producer education to ensure the animals are meeting their maximum potential and making the most money possible, through finishing and better rearing practise and advising those non-showing farmers to de-horn. As well as increasing education on how to get to market through creating added value enterprises and direct selling to business, to better access the high value niche market achieving premiums. Targeting this market was supported by the consumer survey, which established there is demand and a willingness to pay a premium for the higher quality meat. The second area of recommendations is to educate the consumer on the higher quality of meat and where to purchase it, through social media use and more engagement with consumers at shows.

Overall there is potential for the breed to be commercially successful through gradual improvement. It is also recommended to form action plans for implementing any recommendation, providing direction and ensuring change is actioned.



# Chapter 1 – Introduction to Project

## 1.1 Introduction

The HCS is a charity founded in 1884 which operates internationally and is run by a council of 12. The ten-year strategic plan details the society's fundamental aim is to uphold the heritage of the Highland cattle. The society is currently aiming to increase the numbers of cattle and membership numbers. This Management Consultancy project works with the HCS to help provide them with advice on how to do this and the future direction to increase the numbers. This will be done through analysing the current business and help provide future options for how to increase the sales of Highland cattle and its meat.

## 1.2 Project

The HCS approached Harper Adams University regarding a student project aimed at future of Highland cattle. This was deemed suitable for our Management Consultancy module where students work in teams of three to provide advice to the HCS.

The assignment brief confirmed with the HCS and set out a series of questions the HCS would like to be answered; future of meat market and the impact on the breed, why consumers choose Highland cattle beef, commercial outlook of the breeders, the destination of Highland cattle into the supply chain and why it is not considered by other commercial finishers. However, upon meeting with the council via Skype on the 18<sup>th</sup> January 2018, this brief changed slightly from the initial questions and the overarching aim became;

### **Increase sales of Highland cattle animals and beef**

This report aims to review the current society from an external unbiased perspective, review the market place throughout the supply chain and Highland cattle's place within this. Endeavouring to identify future options to meet the aim of increasing numbers.

## 1.3 Approach

Due to the nature of this research looking at the future of the animals and increasing sales of the animals at the consumer and producer end, therefore ultimately looking at the supply and the demand.

It is important to assess how this could be done through looking at the current member's practises as well as thoughts on how they want to approach the HCS's aim. Members are fundamental to the society so it is important to understand what direction they feel the society should take. This was identified by conducting a survey which received 143 responses.

The consumer end was assessed by conducting a survey outside Aldi, Tesco and Waitrose, giving a range of consumers. Aiming to gain understanding of their views on Highland cattle meat and the animal, to examine if there is demand.

There was contact with people throughout the supply chain to get wider opinions on the challenges faced by the HCS as well as suggestions on the future direction. These included;

- Kate James - Pitstocks Abattoir
- Kim Matthews – AHDB
- Robert Phillip – Hellifield Highland Cattle
- Supermarkets
- Butchers
- Farm Shops
- Restaurants
- HCS Members

Transcripts and/or notes from the conversations had with these individuals can be found in Appendices 1 - 7.

# Chapter 2 – Current Society Review

It is important to review the current position to build upon strengths and minimise any identified weaknesses.

## 2.1 Membership and Registrations

As the society’s main income is from membership fees, it is important to understand the members demographic. There were 967 members in November 2017, the survey received 143 responses therefore representing 14.7% of the members.

The survey found 81% were annual members. The average length of membership is 14.2 years however this ranges from 0-64 years.



**FIGURE 1 - SHOWING THE NUMBER OF YEARS MEMBERSHIP OF RESPONDENTS**

(Source: Authors Own, 2018)

There are 323, 33% members in England accounting for 40% of registrations for January to August 2017. Scotland account for 410 42% of members but 57% of registrations, suggesting larger herds. When using Kruskal Wallis statistical test to see if there is an association between location and total herd size, this showed a tendency towards significance at  $p=0.59$ . Where Scotland have the highest mean rank meaning they have the largest herds, followed by England. Table 1 shows the average herd size across the locations, using the total for all cattle options; cows, replacement heifers, bulls, store cattle and finishing cattle.

**TABLE 1 - TABLE SHOWING THE AVERAGE HERD SIZE ACROSS THE MAIN LOCATIONS**

	Average No. animals		
	Total herd	Highlands	Highland X
England	28	26	2
Scotland	46	37	9
Wales	20	17	2
Other	29	24	5
* Other includes international herds			
* includes all animals			

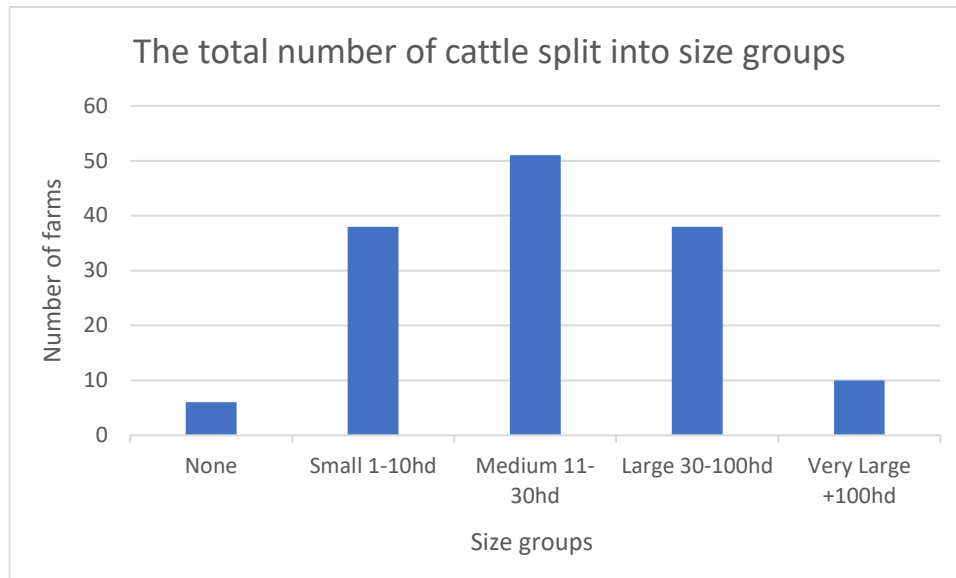
(Source: Authors Own, 2018)

In total, survey members owned 5,080hd and the average herd size is 39hd, larger than expected as in the skype meeting the HCS found the average was 10-20hd. Table 2 outlines the totals.

**TABLE 2 - SHOWING THE MEMBERS TOTAL CATTLE NUMBERS**

Members Cattle Numbers	Total Hd		
	Highland	Highland X	Total
Cows	1980	341	2321
Replacement Hieifers	777	182	959
Bulls	213	10	223
Store Cattle	938	189	1127
Finishing Cattle	390	60	450
	4298	782	5080
Average	32	7	39

(Source: Authors Own, 2018)



**FIGURE 2 - GRAPH SHOWING CATTLE NUMBERS SPLIT INTO SIZED**

(Source: Authors Own, 2018)

The total cattle numbers including all categories are split into size groups in Figure 2, highlighting the range of farmers. Table 3 shows the relationship between size and what producers would class themselves as, they could select multiple options. Overall the highest at 35% of respondents class themselves as small holders/crofters, this is most common in the small herd sizes. In the largest herds pedigree suckler herds are most common. Demonstrating the two groups of members within the society.

**TABLE 3 - MEMBERS OWN FARM TYPE CLASSIFICATION SPLIT BY TOTAL HERD SIZE**

	Number of producers	Farm Type					Total responses
		Commercial Suckler Herd	Pedigree Suckler Herd	Smallholder/crofter	Pedigree finisher	Non Pedigree Finisher	
		% of responses					
Small 1-10hd	38	11	20	59	7	2	44
Medium 11-30hd	51	5	32	45	12	6	66
Large 30-100hd	38	34	40	15	8	4	53
Very Large +100hd	10	32	42	0	21	5	19
<b>Total</b>	<b>137</b>	<b>18</b>	<b>32</b>	<b>35</b>	<b>10</b>	<b>4</b>	<b>182</b>

(Source: Authors Own, 2018)

## 2.2 Member's Benefits

Nine key benefits were drawn out from the US society list, personal knowledge, the council and members rated their importance, see Appendix 8. Table 4 shows the average rating for each key benefit. All the benefits are important scoring over 2.5, the ability to register pedigree and source of credible stock were most important.

**TABLE 4 - SHOWING THE AVERAGE RATINGS FOR KEY MEMBERSHIP BENEFITS**

	Ability to register pedigree	Showing opportunities	Networking	Marketing of breed	Breed improvement	Encourage foreign buyers	Breed specific shows	Farm visits and advice	Source credible stock
Average Rating	4.21	2.69	3.45	3.92	3.71	2.92	2.80	3.39	4.09

(Source: Authors Own, 2018)

It is important to advertise the most significant benefits as it may encourage new members who already have Highland cattle who are looking for these factors.

## 2.3 Overall Society Review

Overall the society's position is currently reasonable stable. It has been seen that there needs to be more unified direction towards common goals without compromising either the small holders or large commercial producers.

**TABLE 5 - SWOT ANALYSIS – HCS**

<p><b><u>Strengths</u></b></p> <ul style="list-style-type: none"> <li>• Shows for members</li> <li>• Helps source credible stock</li> <li>• Supports members</li> <li>• Register pedigree animals</li> <li>• Website good for breeder</li> <li>• Maintaining membership numbers</li> <li>• Following up leaving members</li> </ul>	<p><b><u>Weaknesses</u></b></p> <ul style="list-style-type: none"> <li>• High perceived membership price</li> <li>• Location divide in members and shows</li> <li>• Inactive Instagram account</li> <li>• Commercial and small holding bring conflicting views</li> <li>• Not enough value added by the pedigree mark</li> <li>• Ten-year plan has no actions</li> <li>• Not much consumer-focused marketing</li> <li>• Social media not frequently updated</li> <li>• Logo not consistent across all the social media</li> <li>• People leave the society each year</li> </ul>
<p><b><u>Opportunities</u></b></p> <ul style="list-style-type: none"> <li>• Increased support for current members</li> <li>• Increased support for new members who want to learn how to raise livestock</li> <li>• Breed improvement</li> <li>• More marketing of the breed to consumers</li> <li>• Membership retention plan</li> <li>• Breed improvement plan</li> <li>• Export</li> <li>• Environmentally efficient</li> <li>• Data collection</li> <li>• Potential for a TSG</li> <li>• Health association with the meat</li> <li>• Find what members want from the society</li> <li>• Utilise the trademark</li> </ul>	<p><b><u>Threats</u></b></p> <ul style="list-style-type: none"> <li>• Other breeds will always be a threat – particularly Liung as commercial crossbred versions of the Highland</li> <li>• Losing members through not listening to views</li> <li>• The commercial vs small holder conflict of the breed</li> <li>• Liung is a major threat as it is well established and involves the highland</li> <li>• Small proportion of the beef market</li> <li>• Brexit tariff could mean more imports</li> <li>• Reduction of red meat consumption</li> <li>• Premium cut of beef</li> <li>• Link with an attractive animal that could be viewed as cute</li> </ul>

(Source: Authors Own, 2018)

See Appendix 9 for the financial review of the business and Appendix 10 for the branding, website and social media review. The registrations review features in Appendix 11. Appendix 12 shows the current objectives of the society.

## Chapter 3 – Supply Chain review

### 3.1 Meat Market Trends

For the UK red meat sector, there has been substantial changes in consumer trends, perceptions and purchasing decisions that have affected industry throughout the supply chain from retailers, down to the producers. 15% of adults, in 2017, stated they were avoiding red meat consumption completely in their households, and whilst this a concern, this is in fact an improvement upon 2016, when 18% of adults said the same thing. The improvement is likely to be down to the decline in the media's scrutiny and coverage of the claimed health impacts of red meat consumption (Baker, 2016) and therefore this could suggest a more positive trend and better consumer perception. Nevertheless, 44% of Britons are limiting the amount of red meat they consume and consequently will restrict market growth and potentially reduce demand (Caddy, 2017).

The value of the processed poultry and red meat market fell by 4% in value in 2016 (Duckett, 2017). Despite clearly posing a threat to part of the beef industry, the luxury, higher quality extrinsic value of Highland beef should help it mitigate this threat and therefore the relevance of this is limited although should still be considered. A positive current consumer trend for the HCS and thus Highland Beef is that most consumers do check the origin of the meat as part of their purchasing decision, demonstrating provenance is still considered important by UK consumers. A concern is that price and promotion are more influential and therefore the potential influx of cheap beef products from Ireland, the U.S and South America, because of Brexit negotiations, could have seriously detrimental effects on the industry. However, the HCS and Highland Beef can possibly continue to exploit opportunities. 67% of consumers in the UK do believe product traceability improves trust (Winter, 2017) and this is therefore a trend the HCS could look to develop and act upon, potentially through the introduction of a TSG standard or another similar type of trademark, to provide consumers added assurance.

The Asian middle class is projected to expand rapidly over the coming years, with OECD estimating that two thirds of the world's middle class will be within the Asia-Pacific region by 2030. This will bring about a consequential increase in wealth and disposable income and thus a rise in demand for luxury/higher value goods, including red meat (AHDB, 2016). China accounts for 30% of global luxury goods consumption and is expected to rise by 35% by 2020. The UK does not currently export to China, however Hong Kong not only represents a key export market for British beef, where demand for high quality beef is strong and continuing to grow (Garnier, 2016). Exports of high value and chilled beef to Hong Kong increased by 230% in 2017, helping the UK red meat industry surpass £1.2 billion in red meat export value (AHDB, 2018a), however Garnier (2016) states that strong domestic demand does limit the UK's ability to export sufficient quantities of beef, with exports falling by 12% from 2015 to 2016. The Hong Kong Market also allows for re-export into the Chinese markets (AHDB, 2016). AHDB (2016) also states that the UK is making steady progress towards gaining full access to the Chinese beef market, the 2<sup>nd</sup> largest importer of beef globally. This extensive market is now being complemented and made more attractive to UK exports by the shift in consumer purchasing for cheap, low value cuts and offal, to quality, prime cuts of beef. As well as this, China, and Asia in general, typically encounter environmental limitations and poor efficiency in production systems to ensure sustainable supply of high quality beef and therefore a reliance on imports is likely to



increase further, to satisfy this growing demand (AHDB, 2016). Chinese imports are expected to rise from 400,000 tonnes to 1.8 million tonnes between 2015 and 2020 suggesting demand for beef from global sources will rise substantially. There is evidently a significant, lucrative opportunity for high value, luxury beef in Asia currently, and China is likely to become part of this soon, if the UK can gain full access.

In terms of consumer perceptions of beef products at retail level, there is a low perception of beef being good value for money and only 42% of consumers believe it is easy to cook. Therefore, recipe videos and other informative guides produced by the HCS could increase consumer confidence and satisfaction and encourage beef consumption. There is a strong perception by consumers on the taste and versatility of beef, therefore there is a foundation for the HCS to build upon to encourage consumers to purchase Highland beef (Mintel, 2017).

It is important to assess the overall trends of the UK and global beef sectors as these will impact HCS. There are opportunities for Highland beef to exploit in several markets and it should be marketed as a niche product and promote its positive attributes to gain consumer interest.

See Appendix 13 for more information on the external factors that affect the meat market, in the form of a PESTLE analysis.

## 3.2 Highland Cattle Supply

The Highland cattle supply chain struggles with limited and uneven supply mainly caused by the small herd size, making it difficult to supply a large contract year-round. Robert Phillip HCS member collates Highland cattle from the holdings with small numbers which largely supplies the dovecote park/Waitrose Christmas contract. However, this will then reduce the number of finished cattle in the supply chain for the period after. Pitstocks beef processors supports this stating there is not a consistent supply. A butcher commented that to get Highland cattle meat into the market place, there needs to be continuous supply. Expressing freezing would provide consistency however would damage the premium market price (Andrei, 2017 Cousins butchers Cambridge).

However, there is sufficient animals to supply smaller scale contracts to farm shops, butchers, online. Table 6 outlines all the routes which members are sending animals. Meaning there are 282 responses for 137 producers – this excludes the producers who did not put down any cattle numbers. When excluding the 'not considered' route, 50% of producers have more than one route to market - positive as this shows they do not relying on one method. The most common route is private buyers; however, it is positive that 17% already sell direct to consumers, meaning they are likely already targeting this niche market and potentially achieving premium prices. This is largely the same across all farm sizes, however slightly more common for the smaller farms.

**TABLE 6 - TABLE SHOWING THE PERCENTAGE OF MEMBERS ROUTES TO END MARKET SPLIT BY FARM SIZE**

	Number of producers	End market							Total Responses frequency	% with more than one end market *excluding not considered
		Private buyer	Pedigree sales	Direct to consumer	Finishing unit	Direct to processor	Own farm shop	Not considered		
		% of responses								
Small 1-10hd	38	37	21	16	6	9	1	9	67	62%
Medium 11-30hd	51	34	24	19	5	9	8	2	104	50%
Large 30-100hd	38	40	19	14	10	13	4	0	83	46%
Very Large +100hd	10	32	25	14	11	7	11	0	28	36%
<b>Total</b>	<b>137</b>	<b>36</b>	<b>22</b>	<b>17</b>	<b>7</b>	<b>10</b>	<b>5</b>	<b>3</b>	<b>282</b>	<b>50%</b>

\* excludes responses from farms with 0 cattle listed

(Source: Authors Own, 2018)

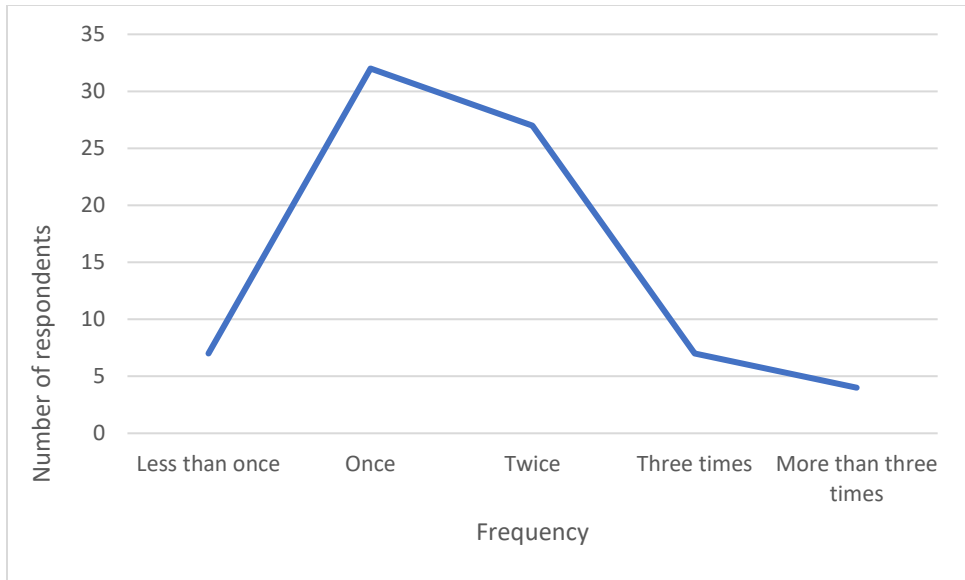
### 3.3 Highland Cattle Demand

Producers do not think there is enough demand for the product, as a common theme, members want the society to help find a market for the cattle and increase marketing to consumers to increase demand.

The consumer survey found that 55% of respondents knew that Highland cattle are a beef animal, however many stated that this was obvious due to having ‘cattle’ in the name, perhaps forgetting or not realising that it could have been a dairy animal. 22% of respondents said they that they had tried Highland cattle meat, which was surprisingly high, but this confirms that there is the demand for this product.

Most of the respondents, 73%, did not know the breed of the beef that they usually consumed, which is unsurprising when supermarkets do not largely market this information on their packaging. An example of a high-end retailer that displays where from and what the breed of beef is, is Fortnum and Mason, this is the kind of retailer that the Highland cattle beef needs to be marketed through.

Figure 3 shows that most respondents eat beef once or twice a week with the lower percentages eating beef three or four times a week. Seven people that we asked ate beef less than once a week. When the frequency of beef eaten was asked, it was not specified in what form, so this takes into consideration the less desirable cuts as well as mince. Therefore, at first glance the information looks favourable towards there being a demand for Highland beef but to explore this further the type of cuts of meat would need to be investigated.



**FIGURE 3 - HOW MANY TIMES A WEEK DO YOU EAT BEEF?**

(Source: Authors Own, 2018)

When respondents were asked whether the environmental benefits would influence their purchasing decisions, 58% of respondents said no, and many made the comments that they did not know what they were. Therefore, this proves that when the supply of Highland beef increases, the environmental benefits need to be marketed to the consumers so that they know what they are.

The most important question asked as part of the consumer questionnaire was whether respondents would try Highland cattle beef, and 87% of people said yes, proving there is demand.

There is a supply and demand chicken and egg issue, as currently the supply chain cannot sustain continual quantity. However currently there is not the incentive for farmers to increase production, as there is no clear easy market for the product which delivers viable prices. This may be due to not enough focus on the niche premium market. This market can achieve higher prices, the consumer questionnaire found that 73% of people would be willing to pay a premium due to the slow maturing and fat marbling of the meat. Therefore, the demand is there but is not being targeted enough by the producers. Some respondents that featured in the 27% of people said they would not be willing to pay the premium were students therefore could not afford it, students would not necessarily be the target market for the Highland beef.

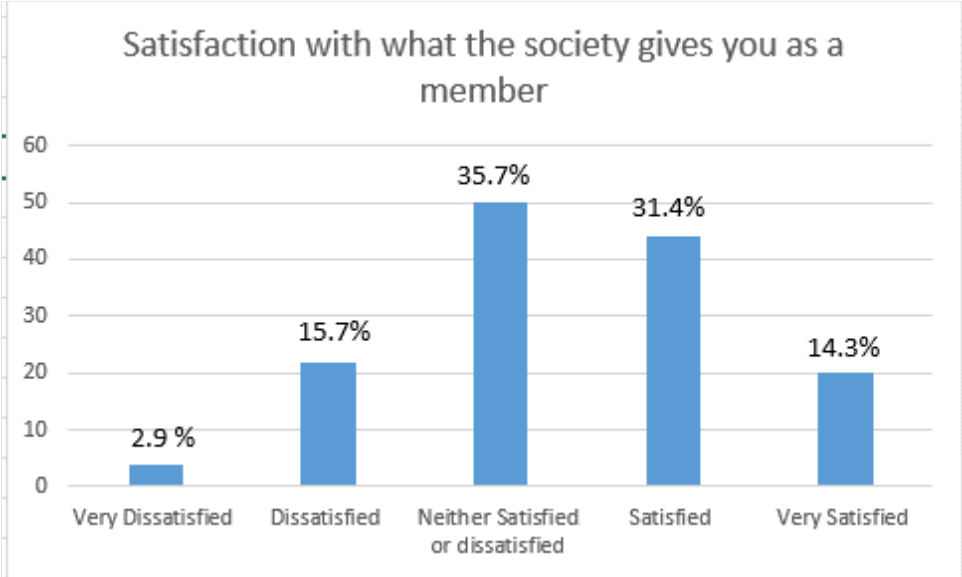
Finally, respondents were asked whether they thought that the horns are fundamental to the iconic image of the animal, 95% of people said yes. This creates issues for the suggestion of the implementation of the polling gene or dehorning of the animals to make them easier for handling purposes.

All of the consumer questionnaire results can be found in Appendix 14.

# Chapter 4 - Future Options

## 4.1 Members current satisfaction

Figure 4 shows the current satisfaction with the society. There is 45.7% who are satisfied with the current society. It is expected that these members will continue with their membership. However, there are 18.6% who are dissatisfied, this group is more likely to not continue membership if they are not satisfied. It is important to address why these members currently feel dissatisfied and try to make changes to retain members. There is current a member retention plan calling members who wish to cancel to understand why. It is also important to understand why those are indifferent to ensure they are satisfied as these are also at risk of not continuing membership.



**FIGURE 4 - SHOWING MEMBER SATISFACTION**

(Source: Authors Own, 2018)

The survey asked members what they would like the society to do. This was an open question; the responses have been grouped into similar categories. The full list of grouped responses see Appendix 15. The most important factors are outlined below. The aim is to also include as many of these factors within the recommendations where suitable, to not only increase the numbers of cattle and increase memberships but also retain members by making sure they are more satisfied.

**TABLE 7 - THE MOST IMPORTANT FACTORS MEMBERS WANT THE SOCIETY TO DO MORE OF**

<b><u>What would you like to see the society do for you?</u></b>		
<b>Summary most important Factors</b>		
Support		1
New members/Novice breeders		6
Rearing practice		7
Better Breed Improvement/Standard		5
Crossbreeds		6
Promote the breed		5
To consumers		9
Breed attributes		6
Commercial viability		10
Commercial encouragement		5
Address Location divide		4
Sales Location		6

(Source: Authors Own, 2018)

## 4.2 Highland cattle as a breed

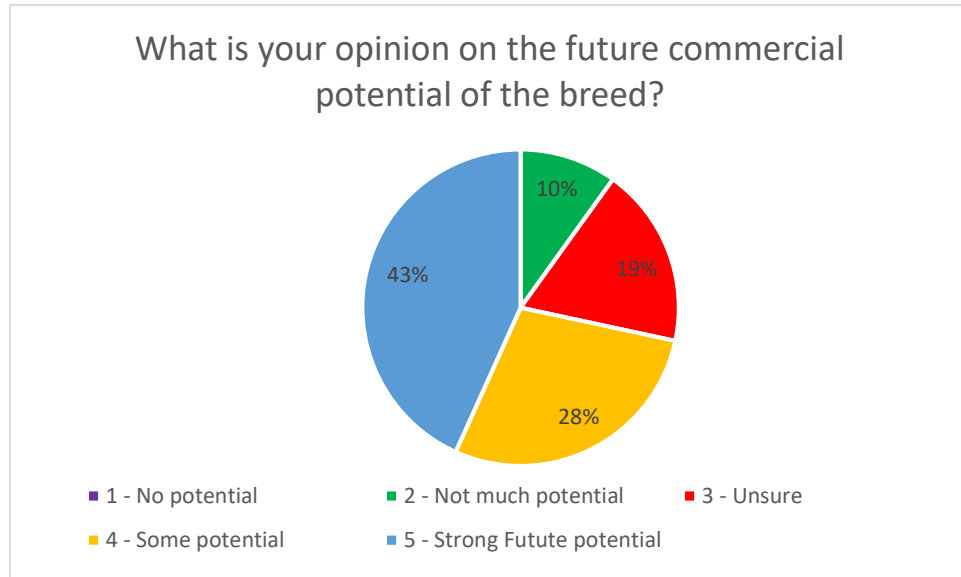
It is important for the recommendations to try and limit the weakness and threats and focus on maximising the opportunities and strengths of the breed. The following SWOT analysis is based upon HCS literature and members questionnaire (See Appendix 16).

**TABLE 8 - SWOT ANALYSIS – HIGHLAND CATTLE ANIMAL**

<p><b><u>Strengths</u></b></p> <ul style="list-style-type: none"> <li>• Low maintenance</li> <li>• Survive on grass-based system</li> <li>• Easy calving</li> <li>• Tasty meat</li> <li>• Healthier meat than other red meat</li> <li>• Hardy – survive outside year round</li> <li>• Iconic breed - consumers recognise</li> <li>• Placid temperament</li> <li>• Suited to difficult upland terrain</li> <li>• Makes a good cross animal</li> <li>• Lot input making it a commercial viable breed</li> </ul>	<p><b><u>Weaknesses</u></b></p> <ul style="list-style-type: none"> <li>• Horns difficult putting into abattoirs</li> <li>• Horns make difficult to estimate animals' weights (Robert Philip)</li> <li>• Small animal – small carcasses</li> <li>• Consistency within breed varies widely</li> <li>• 30-month beef rule difficult to reach as slower finishing</li> <li>• Commercial vs smallholders bring conflicting views</li> <li>• Not enough value added by the pedigree mark</li> <li>• Average herd size is small</li> </ul>
<p><b><u>Opportunities</u></b></p> <ul style="list-style-type: none"> <li>• Increase pedigree marks value</li> <li>• Breed improvement plan</li> <li>• Export potential due to iconic well recognised breed</li> <li>• Environmentally efficient</li> <li>• Data collection</li> <li>• Potential for a TSG</li> <li>• Health associate with the meat</li> </ul>	<p><b><u>Threats</u></b></p> <ul style="list-style-type: none"> <li>• Conflict in views of the breeds future commercial vs small holder</li> <li>• Beef consumption slowing</li> <li>• Brexit and cheap imports consumers swapping to cheaper alternatives</li> <li>• Luing is a major threat as it is well established Highland crossbreed</li> <li>• Small proportion of the beef market</li> <li>• Brexit tariff could mean more imports</li> <li>• Reduction of red meat consumption</li> <li>• Premium cut of beef</li> <li>• Link with an attractive animal that could be viewed as cute</li> </ul>

(Source: Authors Own, 2018)

Overall the members believe there is commercial viability in the breed, with 71% of the respondents finding it to have commercial potential (Figure 5).



**FIGURE 5 - SHOWING MEMBERS OPINIONS ON THE COMMERCIAL POTENTIAL OF THE BREED**  
 (Source: Authors Own, 2018)

### 4.3 Member’s opinion on improving the commercial viability

In terms of the future of the breed and increasing its commercial viability Table 9 shows the summary of the most important factors to the open question “how do you want to see the commercial value of the breed being improved?”. The full list of all the factors can be seen in Appendix 17.

**TABLE 9 - MEMBER'S OPINION ON HOW TO IMPROVE COMMERCIAL VIABILITY**

<b>Question 11 – How do you see the commercial value of the breed being improved?</b>	<b>Total</b>
<b>Marketing general</b>	7
<b>Marketing Product</b>	
Marketing the beef	15
encourage breeders to add value to the product themselves	8
<b>Marketing Breed</b>	
Promoting Breed Attributes	9
Low input	14
Crossbreeding vigour	20
<b>Practical</b>	
Help breeders produce good animals	8
Improve breed quality/ retain high quality	6
<b>Getting to Market</b>	
Encourage dehorning in those animals not to be used as breeding stock	6
	0
<b>Not Commercially viable</b>	3

(Source: Authors Own, 2018)

There are some crossovers between Table 9 and Figure 5. Which highlights their importance;

- Crossbreeding vigour and commercial viability
- Promoting the breed to consumers
- Promoting the breed – attributes, low inputs and commercial viability.
- Rearing practice – to produce high quality animals.

Therefore, the recommendations build on these areas, as they satisfy the aim of the report while also helping to increase current member satisfaction.



## 4.4 Member’s opinions on the future options

Initially when considering the project aims and reviewing the market place and society, a few potential options were considered. These were deemed suitable directions we could potentially recommend;

**Export potential** – Highland cattle are an iconic breed. This could be capitalised upon and used to market the beef as high value luxury product. This could also benefit from the reputation of Scotch Whiskey which is recognised worldwide exporting 1.23bn bottles valued at £4.36bn in 2017(Scotch Whiskey Association, 2018).

**Targeting niche high value product market** – In order to generate a higher value for the product.

**Breed improvement** – This could increase the standards of the cattle being produced. This may help to also add value to the current animals if they can be produced in the same way but are genetically producing higher weights and outputs.

**Promoting crossbreeding** – In order to increase the commercial viability as this could increase the growth rates and weights and may receive better prices when selling direct to abattoir, as the animals would meet the EUROP scale better, which pricing is based upon. This is something the pure Highland struggles to achieve and prevents access to gaining premium prices.

Table 9 shows the member’s opinions on these options, the full table of frequencies of responses is shown in Appendix 18.

**TABLE 10 - IMPORTANCE FOR POTENTIAL FUTURE SOCIETY OPTIONS**

	Export	Breed improvement programme	Niche High value product	Crossbreeding
Average importance	3.25	3.92	4.16	3.78

(Source: Authors Own, 2018)

Table 10 shows the most important option is targeting the niche high value product area. Once this target area was established the consumer survey was aimed at finding out if there was potential demand for this.

## 4.5 Consumer Demand Potential

The consumer survey shows that consumers will be willing to pay a premium. Therefore, showing there is demand for the product targeting higher value. The recommendations shall focus on how the society can help members achieve this.

# Chapter 5 – Recommendations for the Highland Cattle Society

Recommendations shall also build on the main findings from the consumer and members survey;

- Aiming the product at high value niche market.
- Promoting the breed to consumers
- Promoting the breed – attributes, low inputs and commercial viability.
- Rearing practice – to produce high quality animals.

These main areas fit within two categories – consumer and producer education. This also forms a two-pronged strategy to remove the supply and demand issues experienced currently.

## 5.1 Increasing supply – Member Education

The main conclusion of the research is that Highland cattle are not seen to be overly commercially viable in the wider beef market place. Meaning current commercial producers are unlikely to swap to Highlands. Therefore, the aim should be to gradually increase numbers.

Primarily through improving the current members stock and routes to market, meaning price increases. Producers will then see further opportunity and increase the numbers. Therefore, the main recommendation is to increase the number of animal's current members keep.

Secondarily targeting upland farmers who would benefit from the environmental management benefits of Highlands.

### 5.1.1 Existing Members Education

The main methods of communicating with producers is through the website. It is recommended to start a private member's area, setting out guides on rearing practices. As well as running a public monthly blog to educate members but also potential producers.

The other method is through increasing the number of farm visits and sessions, although these are more expensive to put on and access a narrower population of members, it may be more effective at educating members. Therefore, for each action it is important to try and offer both to influence the most people.

**De-horning** – The iconic horns are a barrier to putting the animals into abattoirs. Phillip, (2018) finds they can distort weight estimations by up to 100kg. Findings from the member questionnaire found that members want more lobbying to increase the abattoirs acceptance of horned animals. This could be done by the society alone or through joining with other societies for other horned breeds, the latter may carry more weight. Matthews, (2018) finds horns are a big limitation to the commerciality, suggesting introducing a polling gene or adapting the breed standard to reduce the weighting of horns when showing. However, the society's fundamental aim is preserve the heritage of the breed for which the horns a major element. The consumer survey also found consumer find the horns iconic to the breed.

However, those farmers who have no interest in showing the animals, it is important to educate them to de-horn if they do not want to be penalised by the abattoir.

**Finishing** – Most are raised on a 100% grass-based system with no additional feeding. This is enough for the animals to survive but will not finish in a commercial time frame, meaning they are not achieving the best possible efficiencies. Highland cattle can also put on fat cover too early when on good pasture. Therefore, educating producers to produce the stock through good practise is important to produce high quality carcasses.

### **Performance Recording**

Signet (2015a) states that performance recording will not only aid marketing breeding stock where there is an increasing demand, from commercial producers, for performance data, i.e. EBVs, also enabling breeders to understand where their herds need to improve upon and therefore influence future management decisions. Livestock farms can benefit considerably from performance recording as it allows for informed decision making, the identification of strengths and weaknesses, and help stakeholders implement changes where required, to improve overall enterprise performance and potentially profitability (AHDB, 2018b).

Key performance indicators include:

- Growth rates
- Feed conversion
- Killing out percentage
- Calving Ease
- Fertility/Calving Intervals

There are some barriers for producers attempting to begin performance recording. Particularly equipment, requiring cattle handling facilities such as a crush and a race system for larger herds. Weigh scales are needed for regular weighing of the cattle for the Signet recording scheme and therefore are a further financial outlay for the producer. As well as this there are further fees charged by Signet that can be found in the producer education recommendations.

However, a concern is that most members stated they would not be willing to share data which would be barrier to breed improvement using this method shown in Table 11. This may be down to the costs associated with performance recording and if this can be subsidised by the HCS, members may be more willing to uptake this method.

**TABLE 11 - WOULD MEMBERS BE WILLING TO SUBMIT DATA**

<b>Would you be willing to submit animal data</b>						
	<b>Killing out %</b>		<b>Dead weights</b>		<b>Liveweight gains</b>	
	<b>Frequency</b>	<b>Percentage %</b>	<b>Frequency</b>	<b>Percentage %</b>	<b>Frequency</b>	<b>Percentage %</b>
<b>Yes</b>	42	34.1	57	44.2	43	33.9
<b>No</b>	81	65.9	72	55.8	84	66.1

(Source: Authors Own, 2018)

**New members support and rearing advice** – More support for new members was specifically requested by the members. By providing more guides and support for new members, potential new members outside of the breed will be encouraged to start breeding Highlands. Support on how to manage, rear and even show Highland cattle will also potentially increase the standard of cattle within the breed.

**Helping members reach new niche markets** – By helping farmers to market their own animals to niche markets it increases the prices, which may encourage farmers to increase their number of cattle to take advantage of this.

- Therefore, providing help to farmers to develop their own businesses and routes to market by creating added value enterprises i.e. food stalls and box schemes. This increases the price they would receive compared to selling to the open market. This could be achieved through regional business start-up and brand development days bringing external speakers at a discounted rate for members. This could also include support guides in the member’s only online area.
- Helping to improve sales skills which may allow farmers to target direct to business sales to restaurants and farm shops more easily.
- Help forming local producer groups will allow a more consistent supply which may then be better able to supply businesses. This should be done on a regional level suggesting the benefits and collecting names of interested parties and organising meetings between them to facilitate the initiation.

**Members only online cattle sales and wanted area** - The location divide for sales was another major area that members wanted to see improved. Due to Oban’s success Southern shows are not attended by the major Scottish farmers. There are also issues of high frequency TB testing areas.

It was suggested having a more effective online for sale and wanted area for access for members only. By improving this it will benefit the existing members but also will help to encourage new members as by being a member makes it easier to source credible stock.

### 5.1.2 Wider farmer education

The Highland cattle as a breed does have some huge benefits which need to be taken better advantage of. They can be advertised to farmers who would benefit from the breed. This should be done through wider marketing campaigns at shows already attended – Great Yorkshire, Royal Welsh and Royal Highland.

**Environmental/ low input management** – The current state of uncertainty with regards to continuing agricultural support. It is expected subsidies will decrease and take a more environmental focus (Bailey *et al.*, 2016). Therefore, it is expected farmers will want to make use of their marginal land to offset the lost income. This suits the Highland cattle as their low input nature means they are a method of generating income from little expenditure. They can also help manage the more difficult landscapes that more commercial continental breeds cannot access. Therefore, there may be potential to receive financial incentives such as grants from the UK Government to support farms using Highland cattle for low input production. The sustainable methods associated with rearing Highland cattle could also be used as a marketing tool to promote Highland Beef to consumers. Low management requirements of Highland cattle also make it easier for new entrants to farming to start off.

HCS could address this by engaging with farmers at shows and events to understand how they plan to mitigate the effects of Brexit and then explain how the breed could benefit them in achieving their objectives through adopting a low input system.

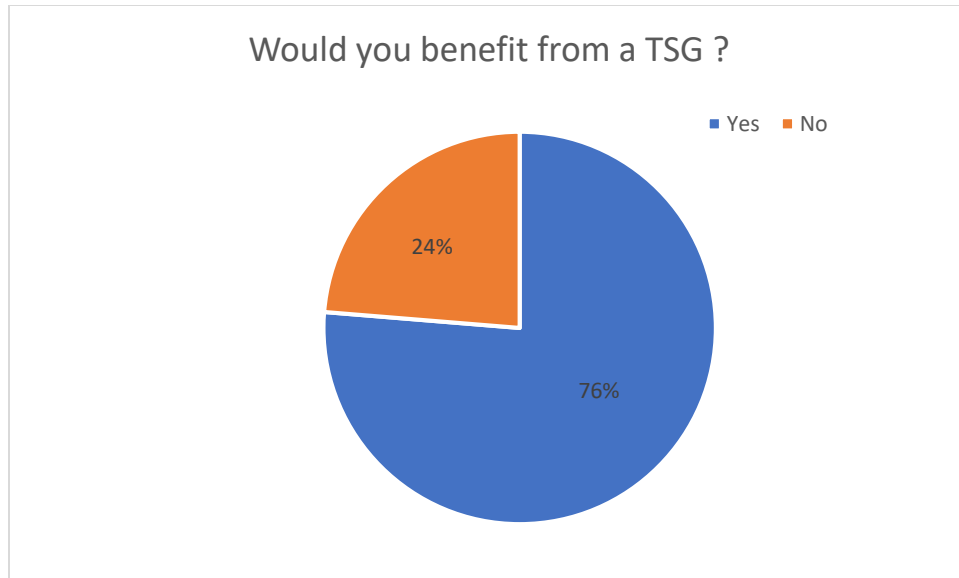
## 5.2 Increasing Demand – Consumer education

Increasing consumer awareness is something wanted by the members but will also help towards the aim. Through increasing the profile and awareness raising demand and hopefully raising price. It will pull more Highland beef through the supply chain and farmers will see this opportunity and gradually increase their numbers to take advantage of the increased demand.

**TSG** – The creation of a membership TSG. This is a quality assurance mark which can add value to a product and give the product a premium. It aims to protect the quality of a product or a production method. There are three types of quality assurance mark, Protected Geographical Indication(PGI), Protect Designation of Origin(PGO) and Traditional Specialty Guarantee(TSG). However, the latter is the only one which is not location specific, this would make it more suitable for the HCS, which has many members outside of Scotland.

The product itself may not be specific enough to warrant an assurance mark, as the Highland beef is fundamentally beef, indistinguishable from other breeds as a raw product. However, the traditional grass-fed rearing could be the main angle taken, following the same as traditionally reared Gloucester Old Spot pork TSG. The traditional conservation style grazing for upland environments which most of other beef breeds cannot do. Appendix 19 outlines how to apply for a TSG.

This is deemed a suitable avenue to take to communicate the benefits to consumers while also adding value to product. Figure 6 shows what the members would benefit from.



**FIGURE 6 - MEMBER'S OPINIONS ON WHETHER THEY WOULD BENEFIT FROM A TSG QUALITY ASSURANCE MARK**

**Quality of the meat** – Education about the high quality of the meat as well as its other advantages of being healthier and having lower cholesterol than other breeds of beef.

**Accessing the meat** – It is important that consumers can find the meat as Matthews (2018) states if demand increases but consumers cannot find the product they are unlikely to try again. Therefore clear links need to be made to this area of the website from social media and other consumer focused marketing. It may also be useful to have more website links to buy online, as 22% of consumers regularly buy food online (Statista, 2018b).

**Methods to educate consumers**

**Shows** - Events the HCS current attend with a stand are the Royal Highland, Royal Welsh, Great Yorkshire. These are primarily for meeting with current members and attracting new members. However, it is suggested there is also more focus on communicating with the public, potentially inviting members to sell their products on the stand and offering free tasters. This would create engagement with the non-farming community.

It is important the focus is not shifted from the members as they are still the most important, however these events offer huge footfall to connect with not only members but potential consumers. It may also be worthwhile attending more consumer-based shows such as The Good Food show to connect with the consumer market.

**Social media** –

People like to relate to brands and want up to date contact via social media (Mintel, 2017). It is a powerful tool for connecting with consumers if utilised properly. Consumers prefer enjoyable content over direct advertising and like to use social media for entertainment – this is important when advertising to consumers (Mintel, 2017).

Consumers like to look at websites for reviews (Mintel, 2017). This may be important for advertising to consumers, such as the dissertation on Highland cattle's meat quality which may

need to be converted into a consumer-friendly version appealing to consumers. This should be shown as independent research and can therefore be treated as a review of Highland meat. It is important for the research to be independent so there is no bias in the result as this can create distrust with consumers (Mintel, 2017). It may also be an idea for the HCS to conduct a sensory panel for the public, getting consumers to follow the pages and then publish the results.

One of the main areas for improvement is the website and social media aimed at consumers. It is mainly aimed at members which is the main reason for the society's existence. However, the survey results showed that people want more marketing to consumers about the breed and meat. This would increase the awareness and demand within the public. Whether this is done through an Instagram account or a separate Facebook page. This would separate the audiences as the members will want to see different content to consumers, who will not be interested in bull sales etc and would rather use social media for entertainment or education into the benefits of Highland cattle meat (Mintel, 2017).

There is little information directed to consumers about Highland cattle such as the meat benefits; where you can purchase the meat from and recipe ideas. Potentially there needs to be two pages to suit members and consumers.

Instagram - This social media app could be directed at the consumers of Highland cattle by including regular images of recipes with the main ingredient being Highland cattle meat. This should increase the demand for Highland cattle meat, therefore increasing sales in retailers.

## Chapter 6 - Conclusion

In conclusion the current HCS is performing well however there is room for improvement to increase the effectiveness.

Overall it is recommended to increase the consumer education to raise the profile of Highland cattle as a high-quality beef breed. As well as increasing producer education to help them access niche high value markets and increase the output from the cattle through better rearing practise.

The recommendations made are deemed realistic for the society to carry out in terms of cost, timescales and difficulty. It is recommended to form an action plan for the implementation of any chosen recommendations. See Appendix 20 and 21 for the detailed recommendation tables for producer and consumer education respectively.



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# Appendices

## Appendix 1 – Milestone Meetings

### 1.1 Milestone Meeting 1 – Email to Jacky Harrison

Hi Jacky

A milestone update to let you know where we are at and the direction we are aiming to go down. We wanted to wait and get a feel for the survey results so our direction was informed.

We are planning to go down the education route;

Consumer education - to educate them on the benefits of Highland cattle meat and the animal as well as increasing the link between the meat and animal. Through social media and society presence at consumer events and shows.

Member education - with the aim to increase the returns they get from the animals they have by making them more saleable. By increasing the returns it will make them more attractive and will hopefully increasing the numbers of animals people keep.

I hope this is an okay route to head towards.

Thanks,

Rachel

### 1.2 Milestone Meeting 2 – Visit to see Jacky Harrison at Reilth Top, 21<sup>st</sup> March 2018 (Harrison, 2018)

\* Struggle to move the sale further down south due to high frequency TB testing areas

\* Newark is a 4-year TB testing area (Newark Cattle Market/Showground)

\* Education at shows – speakers which will capture the audience that does have access to the website/social media

\* Create an area on the website where the Facebook feed is automatically updated

\* 30-month rule for animals going into the supply chain. Jacky has sold animals that are 6 years old and someone that she knows sold an animal that was 13 years old. The butchers cannot tell the difference in terms of tough meat and bones.

\* It should be seen a niche, luxury product that matures with age, like whisky etc.

\* If you get a highland up to weight within 30 months then it most likely has been stuffed

\* Horns are very important for showing

## Appendix 2 – Pitstocks Semi-Structured Interview

Katie James a buyer for Pitstocks beef processing plant was asked questions about the project to gain an insight from within the supply chain.

### How many Highland cattle do you buy on average?

We don't buy more than 100 highland cattle per year.

### Where do the Highland Cattle come from?

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.

### How well do Highland cattle perform in terms of conformation?

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.

### 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.

### How many Highland cattle do you process?

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

### Is this likely to change?

The number of Highland cattle we kill is not growing.

### What do you look for when buying?

Farm assured 1 (price deductions for cattle that aren't farm assured)

Conformation 2 (more important for the UTM side of things)

Welfare Standards 3 (welfare of cattle is usually high when farms 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 to us)

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)

### Why do you only take a small number of Highlands?

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 must travel, again this is made more difficult by the horns

They are not commercially produced on any large scale to ensure consistent production numbers.

Their 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 a 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 3 - Telephone call with Kim Matthews, AHDB

Kim Matthews – AHDB Animal breeding and product quality.

**What route do you think the society should go down?**

Society can do what every it wants to do if go down the commercial route then lot of work to do but is possible but would mean there would need to be substantial changes to the fundamentals of the breed. A major issue to becoming commercial is the horns. There may be a need to introduce a polling gene if they seriously want to get into mass market commercial rearing. There would also be a need to increase the size and conformation of the animal to be comparable to other breeds. However, if they want to stay true to type then must find a niche for it, in which case it's a marketing question which can hang a strong brand off and that is its commercial opportunity.

**There has been research to show that Highland cattle have a higher eating quality, could this be a marketing point?**

I don't think that despite this research there is significant difference between eating quality of specific breeds. There is more difference within one breed rather than between breeds. For this to be a marketing point it would need to be comparison to many different breeds and this should ideally be independent.

**Do you think the focus should be on increasing demand or increasing supply?**

There would be massive benefit to increasing the profile with consumers, this will create more demand. However, if they can't supply it can create more harm than good if people try to get it and can't they are unlikely to try again. I would say there is demand there particularly if it was marketed as a niche premium product. However, the supply needs to be there to satisfy the demand. However, if farmers aren't seeing this demand then they won't increase the supply.

Also issues such as the horns if it will be profitable can be dealt with. However, it needs to get to the point where it is profitable before the horns issues becomes easier.

**Do you think there is export potential for Highlands?**

I think there are the same issue would need to find market that does not mind uneven supply or find a method to provide even supply. I would think that it would be easier to focus on the home market initially before branching out. As this would be difficult to achieve with language and distance barriers.

**Do you think the animal should be targeted towards hill farmers due to its environmental management qualities?**

The Highland cattle is good at navigating harsh environments but surely it is no better than other native breeds so why would farmers want to swap from existing native breeds. There would need to be evidence that they are better in order to market that they are better. I suppose they could just advertise the advantages.

## Appendix 4 - Telephone call with Robert Phillip, Hellifield Highland Beef

Finishes and sells highlands for other people, tends to be the people that have 1 or 2 etc. Then sells a more-worthy volume to the abattoir.

Dovecote park/Waitrose contract take 400/year, quarter are supplied by Robert Phillip, he sent 119 last year. All taken at Christmas time. He then sent 19 more beasts three weeks later as part of their normal beef scheme. There wouldn't be the supply for anymore to be sent to Waitrose. Easier option as oppose to through own outlet due to them buying the whole animal and then it's their problem whether they can sell it or not.

Kills 20 animals per year for their own outlet.

Difficult to sell the whole animal through the outlet, sirloin steaks etc go easily but the mince is difficult to shift. Higher price than through Waitrose however.

'the way to increase a minority breed is to kill it and increase the supply and demand'

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 his at a young age and then they're easier to handle and more valuable due to horns weighing up to 100KG. He seemed frustrated at people within the society not knowing how to look after them and then moaning at the price they pay for them. Even such as giving them some food.

He has had people ask him what he does with his highlands, people do not have the link between highlands and meet so he agrees that the 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.

Live export potential for Eastern Europe – Russia but cannot due to rules and regulations, some regarding BSE. Had an enquiry from South Africa but ended up again rules and regulations wouldn't let him export to that country. Export potential in Canada and America where there are a lot of highlands already. Would need to supply a chain of restaurants so that could send sides over. There isn't the supply worthy for exports.



# Appendix 5 - Supermarket Responses

## Retailer Question Responses

Unfortunately, none of the supermarkets we enquired to were unable to give us any information for this project. Aldi, Lidl, Waitrose, Morrisons, Asda, Tesco, M&S, Asda and Sainsburys were emailed. They said it was due to the sensitivity of the information we were asking for. See below the responses from Asda and Sainsburys.



Hi,

Thanks for taking the time to contact us regarding your recent enquiry.

One of our colleagues has sent the below response and we hope we've solved your query.

If you still have any questions just reply to this email and we'll get back to you.

We would love your feedback on how we did to help us be better in future. Click [here](#) to access our survey.

### Response

Hi Sarah,

Thanks for your email about your degree that you're completing at university. I understand that you have some specific questions that you would like to ask to help you with your studies.

Unfortunately we wouldn't be able to answer any specific questions due to business sensitive information. You're welcome however to use any information you can find on our groceries site and our other websites which you can find here:

<https://corporate.asda.com/>

<https://sustainability.asda.com/>

I'm sorry that we can't help you further but I hope that the information is useful for you and I wish you the best of luck with your degree.

Many Thanks,

Laura

Asda Service Team

Your Sainsbury's Case ID: ENQ-1567194



Customer.Service <customer.service@sainsburys.co.uk>  
Sun 24/12/2017, 14:22  
You

Reply |

Dear Sarah

Thanks for getting in touch.

Due to the number of requests we receive, we can't help you with a specific project. However, there's a wealth of information available about our company, from our latest financial results to details on where it all started, check out our [corporate website](#).

We wish you all the very best with your studies.

Kind regards

Martin Clyde | Sainsbury's Careline  
Sainsbury's Supermarkets Ltd | 33 Holborn, London | EC1N 2HT  
[customer.service@sainsburys.co.uk](mailto:customer.service@sainsburys.co.uk) | 0800 636 262  
[twitter.com/sainsburys](https://twitter.com/sainsburys) | [facebook.com/sainsburys](https://facebook.com/sainsburys)

The questions asked to the supermarkets are featured below:

- Are you aware of Highland cattle and/or the breed society?
- What cuts of beef are sold most at your outlets?
- When sourcing beef from suppliers is the breed of cattle part of your selection criteria?
- What other criteria do you have when selecting a supplier, and which is the most important?
- How often do you restock from your beef suppliers?
- How many suppliers do you currently use for your beef, would having a single supplier be preferable for you?
- Would you consider selling Highland beef, and if so, at a premium price?
- Do you believe a Highland beef trademark and logo would create an incentive for both consumers and businesses within your sector to purchase Highland beef?

## Appendix 6 – Butcher Responses

In contact with 65 butchers, farm shops and restaurants, the following were the responses.

### 6.1 Andrei – Cousins Butchers

Hi Rachel

What do financials look like on this beef? Cost price? Retail price that it is realistically achieving in the shops that are already selling it? Margin for us as retailers?

I assume that Highland is in Scotland? How will the supply be organised? What is the transit time? Is there a min order weight/quantity?

Frequent small deliveries that don't require freezing, are absolutely critical for the fresh, top quality proposition.

Are there any marketing plans to create consumer awareness, explain the point of difference, justify the price premium? Your client needs to create consumer demand for this proposition to work.

The grocery market is cut throat at the moment, with price deflation and devaluation of quality driven by Aldi and Lidl. At the same time consumer confidence and spending is declining too, with premium products suffering. Consumers claim to want quality and taste, eco and natural, etc... but nobody is willing to pay extra for it. At the same time, in today's world of instant access and gratification, more and more consumers are choosing "convenience" when it comes to their food - be it eating out or take-away or using ready-made meal solutions - rather than cooking from scratch. Just take a look at the growth of the frozen food sector. That's been the latest headlines.

Hope these thoughts help. Sorry, I've not answered your 8 questions. But this is because I think you are heading down the wrong track with your research direction.

Best regards,

Andrei

## 6.2 Cowlings Butchers

What sector of food retail does your business operate in? (farm shop, restaurant, deli etc.)

Butchers retail

Are you aware of Highland cattle as a cattle breed and/or the breed society?

Yes

What cuts of beef are sold most at your outlets?

We use sides of beef

When sourcing beef from suppliers is the breed of cattle part of your selection criteria?

Yes like to use rare breeds

What other criteria do you have when selecting a supplier, and which is the most important?

QUALITY

How often do you restock from your beef suppliers?

Every week

How many suppliers do you currently use for your beef, would having a single supplier be more preferable for you?

Just one supplier at the moment

If you do already or were to stock Highland cattle beef would it be sold as a premium product?

All our beef is sold as a premium product

## Appendix 7 - Extra information for member questionnaire

### 7.1 Michael Poland Questionnaire Responses

Rather than complete the survey on line, I have attached these notes because its contents should give you valuable information regarding the specifics which apply to the Mottistone Fold on the Isle of Wight.

We have 259 head of cattle in all on the farm including new born calves consisting of pure bred Highlanders and first/second generation Simmental crosses.

The farm is on an off-shore Island in the South of England and consequently suffers from high ferry transport costs and distances to abattoirs. In the South of England there is no niche market other than on a very small scale for native beef with the consequence that most of our beasts are consigned to ABP slaughter houses on the mainland. They are graded as ordinary cattle. The best of our Fold are annually transferred to my farm at Benderloch (Nr Oban) for show and consignment to the HCS sales at either Oban or Stirling.

Some years ago, at the request of the HCS, I headed a Committee which prepared a report for marketing Highland cattle in England. Inter alia, the Society accepted our suggestion that there should be a specialist Highland cattle Sale in England. A sale of Highland cattle at Worcester was arranged for two or three years followed by Chelmsford. I supported both sales with high quality cattle but unfortunately the prices received were so low as to make the venture entirely uneconomical. As a general guide, similar cattle we breed fetched between £1,000 and £2,000 more at Oban. There is simply no satisfactory substitute in England for the status of the Scottish sales.

I have the following comments regarding the specific survey questions:

Question 3, I have added a new heading for Honorary Life Member, an honour which I was privileged to be awarded.

Question 5, I have given a low mark for the marketing of the breed simply because other than the expense of transferring to Oban there is no local niche for marketing Highland cattle for a Fold of our size.

Question 6/7, I have qualified my reply because the Society's database is not so effective for the Highland breeder as the previous supplier. As once a successful breeder of both thoroughbred racehorses and foxhounds, when planning my breeding I rely heavily upon the breeding data. I suggest that my success in the Highland show ring justifies my approach. One used to be able to print off 4/5 generation tabulated pedigrees with information noting whether the offspring is male or female. They are now limited to two generations and there is no differentiation between the sexes. This is a serious deficiency. Sian Sharpe, however, was able to supply me on request with five generation pedigrees by pressing a button in her office but ordinary Society members do not have access to this system.

Question 8, we are a commercial suckler herd endeavoring to breed both pure bred and cross bred Highlands to good weight and grading requirements. Some of our cross bred bull calves are sold as store, otherwise all non-breeding male stock is castrated and finished on the farm. We also finish pure and cross bred heifers not used for breeding.

Question 10, other than a very small number of hobby breeders, I do not know of any Highland herds which are of commercial value. Once an owner employs staff to look after the cattle, he incurs extra overheads which wipe out any possible profit. The owner/stockman might in some cases be able to make a profit by using unpaid family labour and working extra-long hours when required. Having said that, the annual "Stocktake" published by AHDB shows that only a very small number of herds are able to return profits. I can see no future for the commercial potential of the breed – certainly not in England.

Question 11, profits can be made on consignments to Oban, but these form a small minority of our stock. Since the larger abattoirs are now more prominent with strict weight, age and grading requirements, I cannot foresee any special value being applied to pure bred Highlanders. The situation will only get worse should there be a hard BREXIT.

Question 12, I have given a low mark for "healthy meat" solely because all cattle supplied to the large abattoirs go on their "conveyor belt" systems.

Question 14, there is or used to be a high niche value for Highland beef in Scotland. In the South of England, other than the Aberdeen Angus premium, there is no special demand for either store or finished pure bred Highlanders.

Question 15, the trademark currently offered by the HCS is of no value to us in the South of England. One similar to the Aberdeen Angus, however, would be.

Question 17, I prefer to breed my own stock for sale and retain as much as possible in a closed herd policy. Attending cross bred shows and sales would therefore be of no interest to me.

I apologise for being such a pessimist but I believe I am a realist. I have received tremendous joy and satisfaction in breeding quality Highland cattle, but I am working towards a position of breeding dams for our Simmental bulls and a much-reduced pure bred Highland herd.

## 7.2 John Stewart Opinion on the member questionnaire

Hello

I have completed the questionnaire. One issue which is a big hurdle for us in marketing Highland beef is the reluctance of abattoirs to handle horned cattle. Our carcass specs are all within the optimum range and yet abattoirs refuse to take the cattle if they have horns. At present, that is the biggest issue facing us. As producers of pedigree and commercial cattle, we are reluctant to dehorn heifers because it reduces their potential value as breeding animals.

John

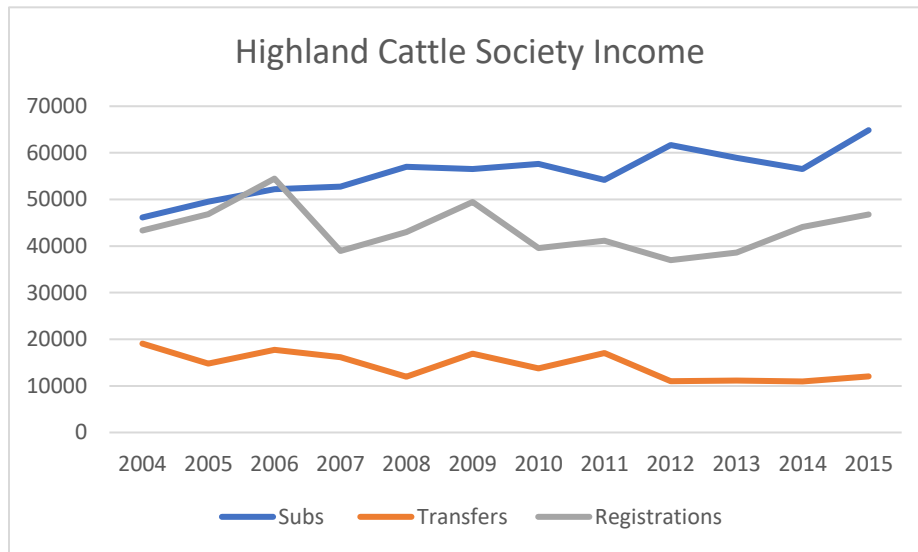
J & M Stewart  
Langraw  
St Andrews

## Appendix 8 - Member's benefits

			Ability to register pedigree	showing opportunities	networking	marketing of breed	breed improvement	Encourage foreign buyers	breed specific shows	farm visits and advice	Source credible stock
Importance Rating 1 - very unimportant 5 - very important	1	<b>Frequency</b>	9	41	11	9	12	36	38	17	6
	2		8	22	17	14	16	25	28	19	12
	3		14	33	37	14	22	28	26	32	11
	4		25	25	47	38	35	22	22	36	43
	5		87	20	30	66	56	32	28	38	70
			Ability to register pedigree	showing opportunities	networking	marketing of breed	breed improvement	Encourage foreign buyers	breed specific shows	farm visits and advice	Source credible stock
Importance Rating 1 - very unimportant 5 - very important	1	<b>Value</b>	9	41	11	9	12	36	38	17	6
	2		16	44	34	28	32	50	56	38	24
	3		42	99	111	42	66	84	78	96	33
	4		100	100	188	152	140	88	88	144	172
	5		435	100	150	330	280	160	140	190	350
	<b>Total Rating</b>		602	384	494	561	530	418	400	485	585
	<b>Average Rating</b>		4.21	2.69	3.45	3.92	3.71	2.92	2.80	3.39	4.09

## Appendix 9 – Financial review income and expenses

HCS's income is from membership with the members either being Highland cattle owners or having a strong interest in the Highland breed. The members register their cattle with the Society, income is also generated through sales commission, however is primarily memberships and registrations. In 2015 these were £64,862 and £46,792 retrospectively. Subs have risen gradually and are relatively stable whereas registrations fluctuate a lot more. Overall Figure 7 shows an increasing income trend. It is important that the aim of this report to increase Highland cattle numbers is reciprocated through increased commission, membership and cattle registrations.

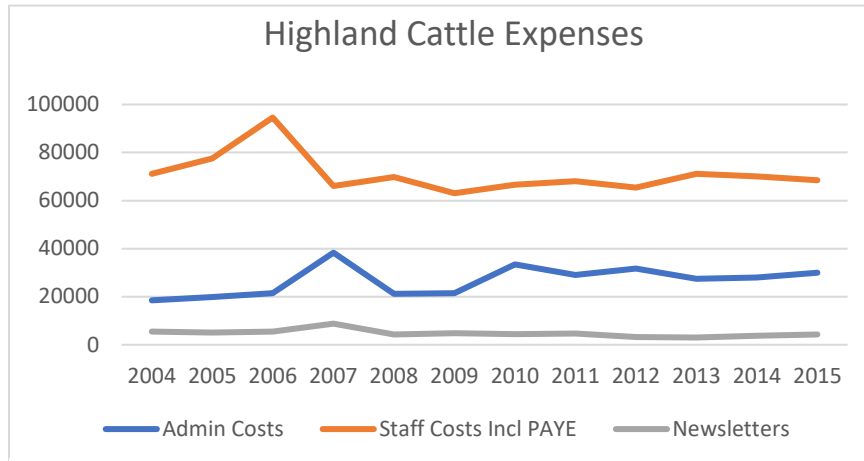


**FIGURE 7 - HIGHLAND CATTLE SOCIETY'S INCOME**

(Source: Adapted from HCS, 2016)

The main expenses are admin, staffing costs and newsletter, shown in Figure 8 These have fluctuated in the past however have more recently been more stable. However, Figure 7 shows that the expenses are also increasing at a higher rate than income.



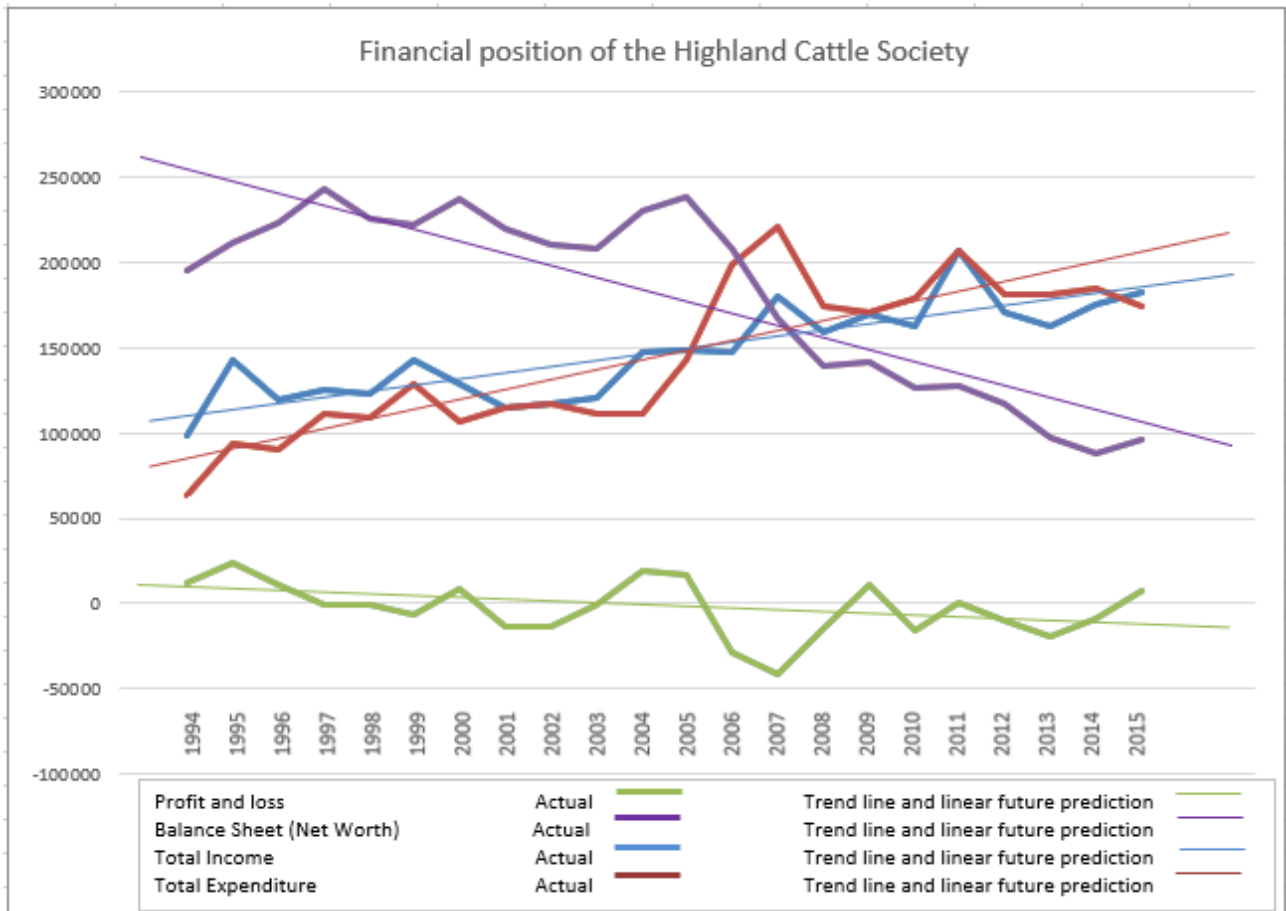


**FIGURE 8 - HIGHLAND CATTLE EXPENSES**

(Source: Adapted from HCS, 2016)

There are a few concerns with the finances as the spreadsheet the income on the specific income page does not match up with the income on the profit and loss page. The income minus expenses also does not add up to the profit. Therefore, there the validity of the conclusion from this section will depend on the accuracy of the data provided. If this is the case that it is not correct it is vital for the society to ensure that they do have accurate figures as it may impact on the societies future.

It is important to assess the financial position, as this the HCS needs to be profitable and have sufficient cash funds to operate. Therefore, the current position will impact on the potential direct the society goes towards and spending to implement any recommendations. The profit and loss have fluctuated, making losses in 2013 and 2014 however has been in profit for 2015 and 2016 which is positive. However, the trend line shows that based on previous years the profitability is declining as it is expected the expenses will rise faster than income shown in Figure 9. The balance sheet has declined rapidly since 2005. This may limit the funds available to invest in projects. Therefore, the methods suggested for increasing the sales needs to be cost effective and generate more income.



**FIGURE 9 - OVERVIEW OF HCS'S FINANCIAL POSITION**

## Appendix 10 - Branding

### 10.1 Logo

Figure 10 is the current logo for the HCS. The Highland cattle outline is a clear representation of the animal, it could be improved by using the recognisable red colouring, this may improve the links with the breed for the consumers.



**FIGURE 10 - HIGHLAND CATTLE LOGO**

(Source: HCS, 2018)

### 10.2 Trademark

The definition of a trademark is a symbol, word or words legally registered or established by use as representing a company or product, however this is not occurring with the highland cow trademark, it is being exploited through companies using the iconic breed for marketing purposes. This is good promotion for the breed however it is recommended this is looking into to have more affiliation with the animal and the HCS.

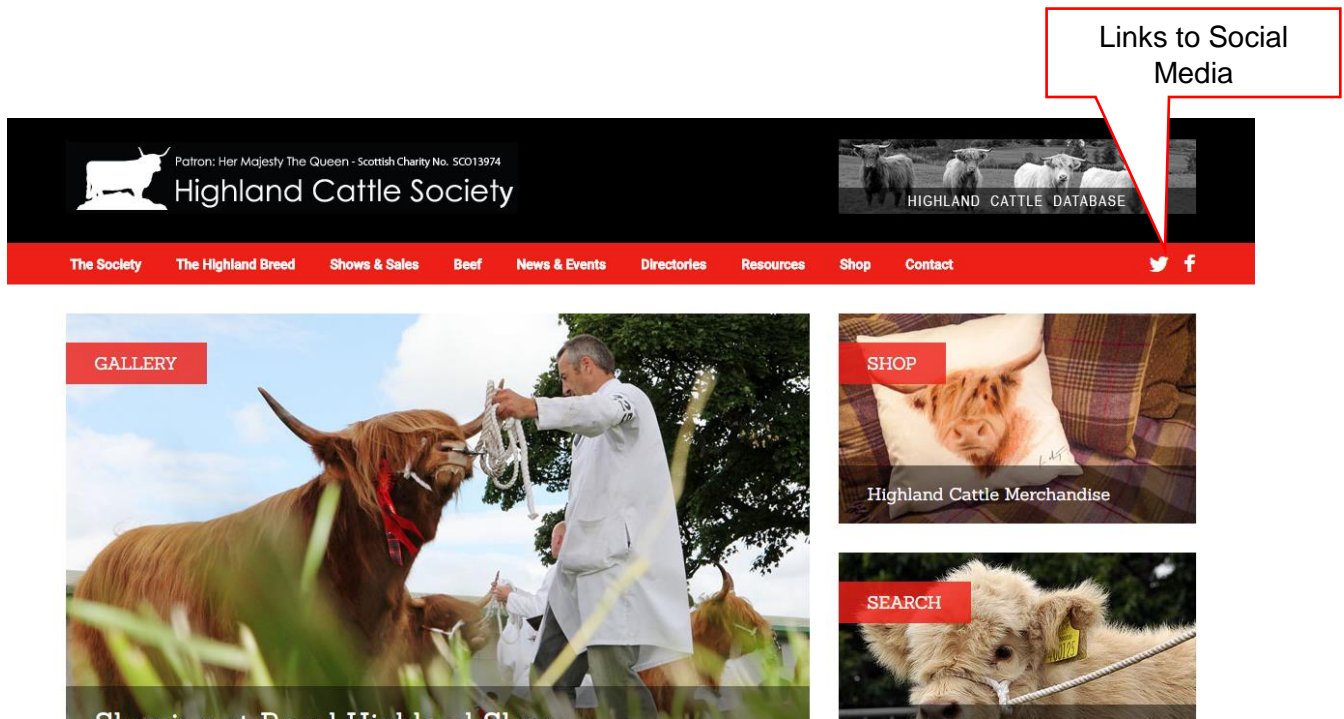
### 10.3 Website

The analytics also prove that the page is regularly visited; 27,000 users, 63% of these were new while 37% were returning. In total there were 42,000 website views from 01/01/2017 - 19/07/2017. This shows many returning views this is likely to be HCS members as the second most popular page visited after the home page is the 'shows and sales' page. Two minutes is the average time spent on the site, suggesting visitors know what they are looking for.

The analytics shows the homepage is most popular having 42% of views. The bounce rate is 60% of visitors only viewing one page. Therefore, it is important to have key information on the front page to attract people to other pages.

### 10.4 Social media

The society's website has links to social media (Figure 10). However, they are small and could easily be missed particularly as the symbols are not in the social media platforms colours which Ilder, (2012) finds important to making them easily recognised. However, they are at the top of the page, also important, as those putting it at the bottom infer it is not important to business as a means of communicating. It may worthwhile to have plug-ins to allowing following and liking the social media pages from the website.



**FIGURE 11 - HCS WEBSITE HOMEPAGE**

(Source: Authors Own, 2018)

Links to social media encourage further engagement through continuing exposed to more HCS content meaning it is kept in their minds, important as currently the average website visit time is two minutes. However, links to inactive platforms can cause more harm (Social Media Examiner, 2018).



**FIGURE 13 - THE HIGHLAND CATTLE SOCIETY FACEBOOK PAGE**

(Source: Authors Own, 2018)



**FIGURE 12 - THE HIGHLAND CATTLE SOCIETY TWITTER PAGE**

(Source: Authors Own, 2018)

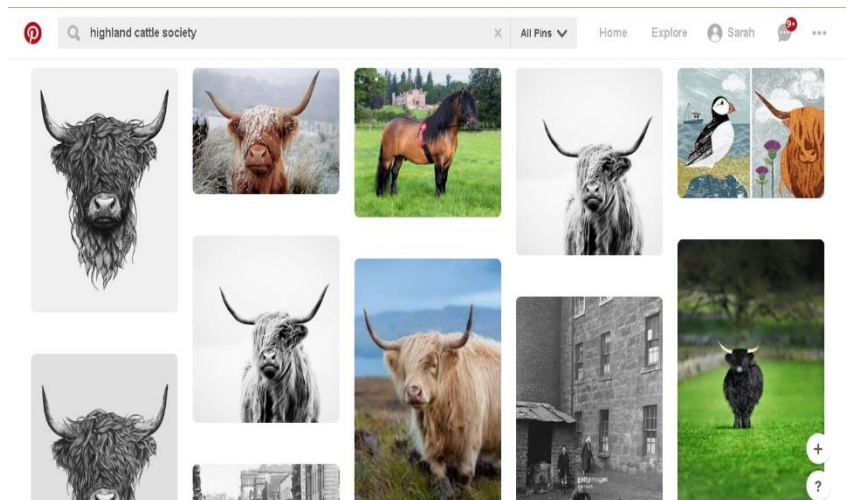
Figure 13 features the current HCS Facebook page which has 5,604 people like the page and 5,594 people following the page. The page is very active as there is information regularly posted. The page is directed at members posting information on shows, markets and the breed itself.

The HCS twitter page found in Figure 12 has over 1,000 followers and is quite active including similar content to the Facebook page also directed at HCS members. The profile picture of the twitter page is not the HCS logo this needs changing to ensure consistency.



**FIGURE 15 - THE HIGHLAND CATTLE SOCIETY INSTAGRAM PAGE**

(Source: Authors Own, 2018)



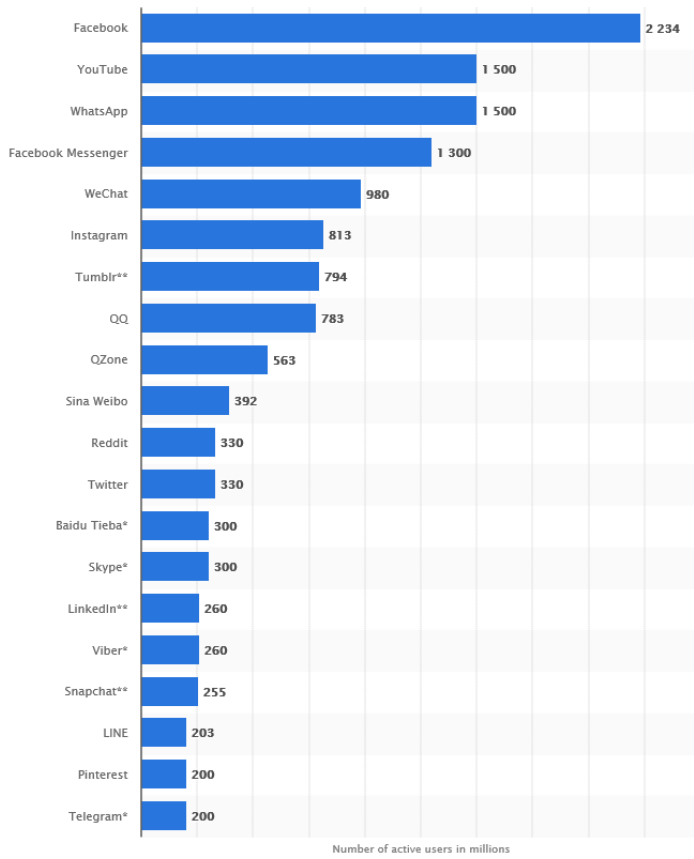
**FIGURE 14 - HCS PINTEREST PAGE**

(Source: Authors Own, 2018)

The Instagram page in Figure 14 is inactive, with only 32 followers and no posts, the name '1884hcs' needs changing to something more easily searched. Instagram is a key social media platform that needs taking advantage of particularly as Highland cattle area recognisable iconic breed suited to photo based social media.

The HCS have a presence on Pinterest (Figure 15). There are many image of the iconic red Highlander, which have links to the HCS website where they can find more information. Figure 15 shows that Pinterest is not a popular platform, therefore there should be more focus on platforms with more users, as seen in Figure 16.

Overall the social media platforms need to be run in sync by one person, with others forwarding potential posts to them to be edited. This ensures a consistent style and synergy between them without overly repeating content. It is suggested the Instagram account focuses on the consumer market with recipe idea images.



**FIGURE 16 - SHOWING THE MOST POPULAR SOCIAL MEDIA SITES GLOBALLY IN TERMS OF MILLIONS OF USERS FOR 2018**

(Source: Statista, 2018a)

## Appendix 11 – Registrations

This is the HCS's second largest income. The table below shows the registrations from January to November 2017.

- 1,037 births registered.

<b>UK Region</b>	<b>Number of highland cattle born</b>
East Midlands	59
Lincolnshire	9
Eastern	81
North East	46
North West	58
Scotland	411
South East	89
South West	97
Wales	66
West Midlands	61
Yorkshire and the Humber	60

- 515 Male
- 522 Female
- Number of births on each account vary from one to 71, so some farms register each cows' calves individually, whereas others register multiple at a time.
- Seven registered deaths

<b>Month</b>	<b>Number of highland cattle born</b>
January	76
February	74
March	119
April	140
May	116
June	115
July	106
August	92
September	88
October	65
November	46

- Highland cattle makes up 1.6% of all registered dairy and non-dairy cattle births in the UK
- 371 Highland cattle crosses (doesn't state what crossed with)

## Appendix 12 - Current Society Objectives

The HCS is a charity based in Stirling, Scotland and was founded over 200 years. The board is made up of 12 members, most of which are Highland cattle producers. Not all Highland cattle are registered but those that are, are listed in the herd book, there is also a lot of information found in the annual journal.

The business has several objectives:

- To preserve and safeguard the Highland cattle breed and ensure its sustainable continuance
- To promote, apply, assist and facilitate the advancement of science in all aspects of breeding management and husbandry of Highland cattle
- To promote advice on and facilitate advantages of Highland cattle in the preservation and conservation of the natural environment and its wildlife habitats
- To promote and advance the physical and mental wellbeing of Highland cattle
- To promote, encourage, educate in and organise the development of individual skills, capabilities and understanding in all aspects of Highland cattle management
- To foster and to develop the sense of community, social and economic adhesion of all those involved in Highland cattle.



## Appendix 13 - PESTLE Analysis.

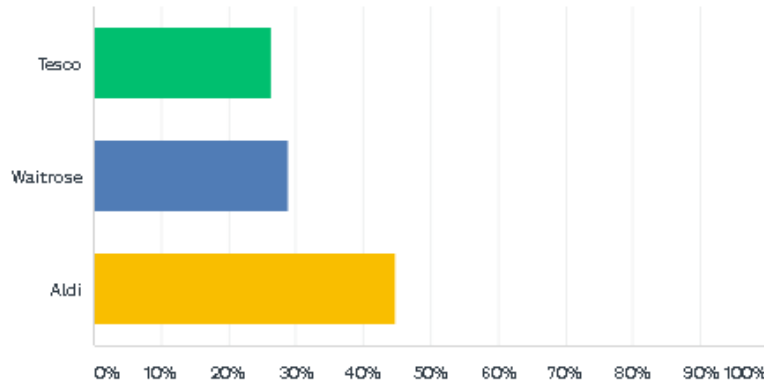
Political	<ul style="list-style-type: none"> <li>• UK Agricultural Policy post-Brexit could have a significant impact on UK beef industry (AHDB, 2017). Threat of being used as a sacrificial pawn to aid trade deals with South American countries to benefit UK finance and services sectors.</li> <li>• China still has import bans on UK beef although negotiations to remove these are making slow progress.</li> <li>• The BSE and Foot and Mouth outbreaks continue to compromise the reputation of the UK beef industry and many countries still have barriers in place to prevent UK beef imports entering their respective country.</li> </ul>
Economic	<ul style="list-style-type: none"> <li>• Expected growth in the value of beef at retail level by 5.2% by 2022 (Mintel, 2016).</li> <li>• Emerging markets in Asia due to economic growth (AHDB, 2016).</li> <li>• High value beef exports to Hong Kong increasing in value (AHDB, 2018).</li> <li>• Progress towards access to Chinese markets being made (AHDB, 2016).</li> <li>• The weak Sterling in recent years has aided UK beef exports in being competitive on the world market.</li> <li>• The loss of subsidies post-Brexit could lead to financial instability for many UK livestock farmers.</li> <li>• Rising feed and other input costs are causing costs of production to continue to rise for some UK farmers.</li> </ul>
Social	<ul style="list-style-type: none"> <li>• Domestic consumer trends are showing a decline in red meat consumption which could reduce domestic demand.</li> <li>• Rising animal welfare concerns over some methods of beef production could also pose a threat to the industry.</li> <li>• Increasing wealth, standard of living and disposable income in Asian countries is causing a growing demand for luxury products, which includes high value British beef (Garnier, 2016).</li> <li>• 56% of British consumers buy British meat when purchasing meat products.</li> <li>• Traceability is important to most British consumers and HCS could take advantage of this (Mintel, 2017).</li> <li>• Increasing interest from consumers on how the meat they purchase is produce, and the relatively ethical and sustainable methods used in the systems Highlands are typically farmed in, could exploit this (Mintel, 2017).</li> </ul>
Technological	<ul style="list-style-type: none"> <li>• Threat of “factory-produced meat” in the future out-competing conventional beef products should be considered, although this will be a very long-term threat and does not pose an immediate risk.</li> <li>• Performance recording equipment improvements now allow producers to scan fat depth and coverage of an animal using ultrasound scanning, allowing producers to continuously improve.</li> </ul>
Legal	<ul style="list-style-type: none"> <li>• The Over Thirty Month Rule means that any cattle over 30 months old are required to be tested for BSE before entering the human food chain. Therefore, due to the slow maturing attributes of the Highland breed, this may cause buyers to be less willing to purchase older Highlands for</li> </ul>

	slaughter because of the added administration and work which is required by law.
Environmental	<ul style="list-style-type: none"><li>• The impact of beef production on the environment is becoming increasingly documented.</li><li>• Pressure on agricultural systems to reduce emissions is becoming common both from the public and in political agendas.</li><li>• The UK has ideal land for extensive beef production.</li></ul>

## Appendix 14 - Consumer Questionnaire Responses

Which store?

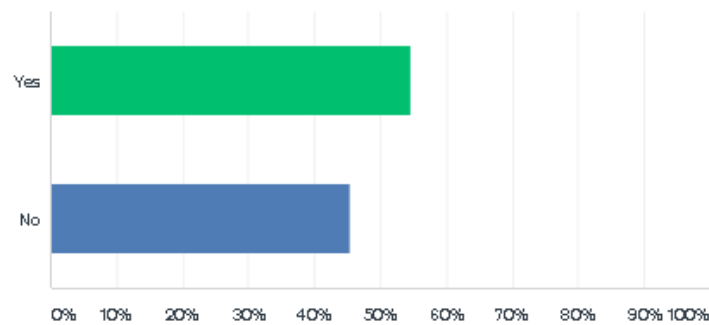
Answered: 76 Skipped: 1



ANSWER CHOICES	RESPONSES
▼ Tesco	26.32% 20
▼ Waitrose	28.95% 22
▼ Aldi	44.74% 34
TOTAL	76

Did you know that Highland Cattle are a beef animal?

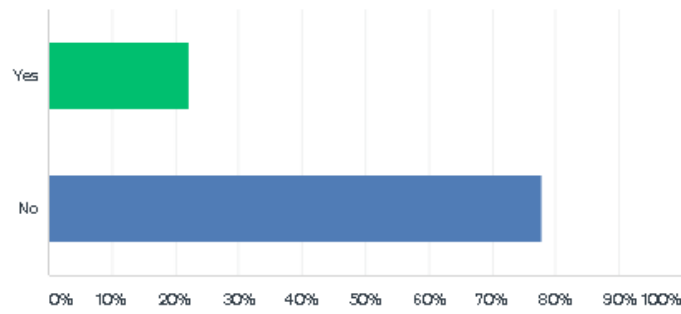
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES
▼ Yes	54.55% 42
▼ No	45.45% 35
TOTAL	77

## Have you ever consumed Highland Cattle meat?

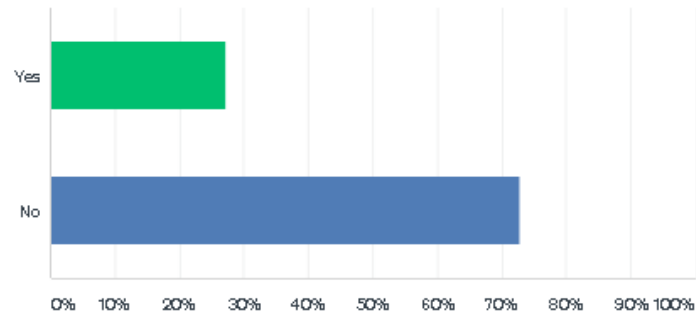
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	22.08% 17
No	77.92% 60
<b>TOTAL</b>	<b>77</b>

## Do you know the breed of the beef that you usually consume?

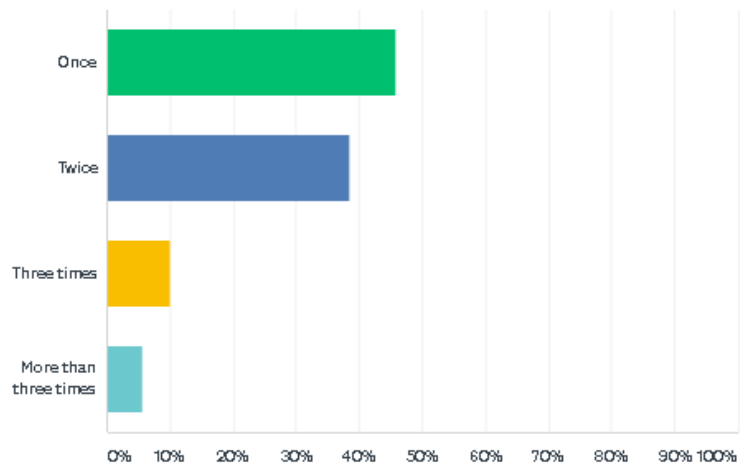
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	27.27% 21
No	72.73% 56
<b>TOTAL</b>	<b>77</b>

## How many times a week do you eat beef?

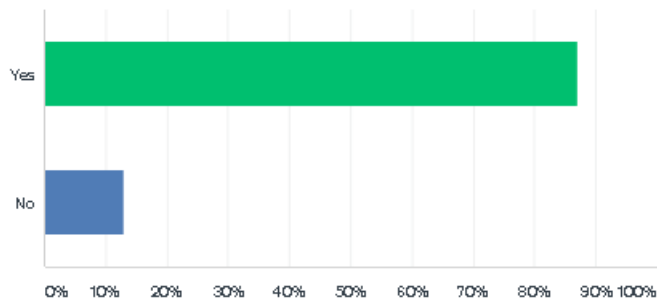
Answered: 70 Skipped: 7



ANSWER CHOICES	RESPONSES
Once	45.71% 32
Twice	38.57% 27
Three times	10.00% 7
More than three times	5.71% 4
<b>TOTAL</b>	<b>70</b>

## Would you try Highland Cattle beef?

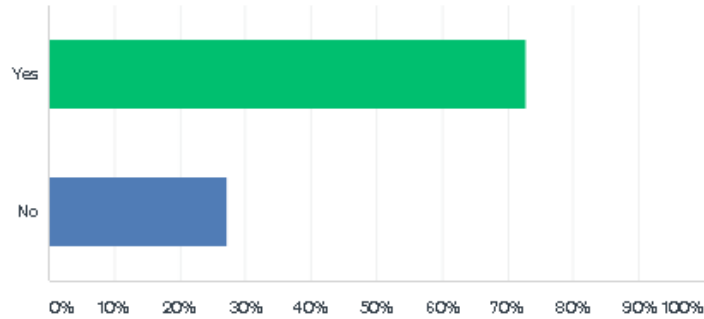
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	87.01% 67
No	12.99% 10
<b>TOTAL</b>	<b>77</b>

Would you be willing to pay a premium for it due to the slow maturing and marbling?

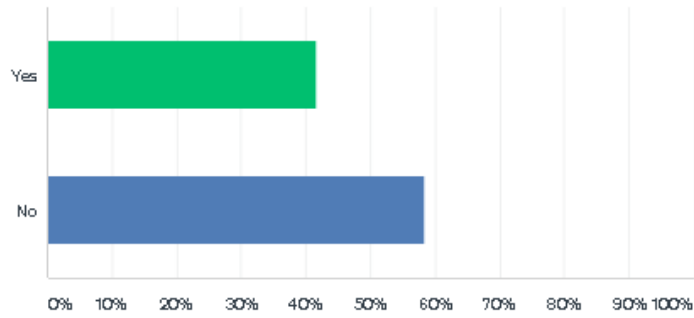
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	72.73%	56
No	27.27%	21
TOTAL		77

Do the environmental benefits of Highland Cattle influence your purchasing decisions?

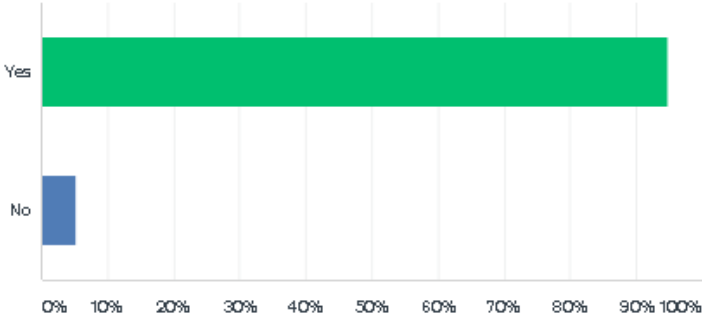
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	41.56%	32
No	58.44%	45
TOTAL		77

# Do you think horns are fundamental to the iconic image of the animal?

Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES
Yes	94.81% 73
No	5.19% 4
TOTAL	77

## Appendix 15 – What would the members like to see the society do?

<b>Question 7 – What would you like to see the society do for you?</b>		
<b>Summary most mentioned factors</b>		
<b>= most important factors</b>		
		Total
Support		1
	New members/Novice breeders	6
	Young breeders	1
	list of AI straws and prices	1
	Rearing practice	7
	Casestudies and figures from experienced breeders	2
	<b>Better Breed Improvement/Standard</b>	5
	Bulls	4
	Crossbreeds	6
	female scoring	1
	DNA diversity	1
	ensure meet a breed standard when given pedigree status	1
	Only register pedigrees	1
	Remove line breeding	1
Environmental		
	Influence Policy	1
	Promote environmental benefits	1
	Work with other native breeds	2
	<b>Promote the breed</b>	5
	To consumers	9
	Increase Price	2
	To farmers	4
	Breed attributes	6
	Commercial viability	10
	<b>Commercial encouragement</b>	5
	Help members find new ways to market	5
	Market as a co-operative	1
	Lobby to abattoirs for horned animals	3



Address Location divide			4
Events			2
Support divide + (international support)			2
Regional subbranches			1
Sales			
Timing			1
Improve Predigree Sales			1
Sales Location	1		6
Higher health status			1
Easier to find stock			1
Shows			0
Suitable for all herd sizes			1
Advice for new breeders			2
Other Members opinions			
Listen more to members oppinions			3
Subscription fees reduce			3
Subscription fees - monthly			1
Registration fees			4
Free website advertising			2
More technically qualified contacts within the society			2
Quicker correspondence			1
Highland Beef Accredited scheme/mark - Highland Dams Included			1

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

Showing all 106 responses <a href="#">Show less</a>
Have more events for its southerly members. Sales more accessible/ closer to make it worthwhile selling at society sales
Contact support
Introduce a creditable bull scheme, improve the breed standing in the current world market.
Provide help and guidance to new members with regard to breeding and showing. Some members have a bad attitude and are happy to judge you as opposed to help you.
<ol style="list-style-type: none"> <li>1. Develop a strong political voice to promote the economic and environmental value of low input hardy hill cattle - possibly in conjunction with other native breed societies. Food security will be an issue at some time in the UK and a more sustainable use of upland areas for meat production could be critical. Policy makers need to be more aware.</li> <li>2. Promote the value of the Highland cow as a first cross for production of upland suckler cattle</li> <li>3. Find ways of supporting the market for pure Highland beef through promotion and a real understand of hoe the meat market works. The true value of the store steer calf is not reflected by the low prices breeders often receive.</li> </ol>
let public taste the beef to encourage them to buy the beef
Make more commercial hill farmers aware of the merits of the breed for crossing purposes, also make pedigreebreeders aware that it is most important to offer cattle that walk properly and are not to fat, I some times see these faults at pedigree sales,often they are over fat to disguise poor conformation p
Help the sale of cattle throughout the country rather than just in Scotland
Increase market value of breed
Improve the cattle by encouraging more cross breeding of poorer quality animals.
PAY MORE ATTENTION TO THE MEMBERS AND THERE OPINIONS REGARDING TO HOW THE BREED SHOULD BE PROMOTED.
Start to look at using highland dam as part of the guaranteed highland beef mark instead of just bull sired cattle
More emphasis on commercial attributes
Market the beef.
Try and take the barriers down between the north and south of the border
Make registration fees cheaper.
Basic needs re registration etc
Promote more in England & Wales
The society are a long way could do with a 'regional' sub branch
Carry out successful pedigree sales
Provide more regional/local opportunities around the UK to sell Highlands. At the moment the primary HC sales take place at Oban. I'd like to see more Highland cattle sales across England & Wales.

More promotion of the commercial side to add value to animals that are not as good quality so that it in turn will add value to to elite and quality pedigree side. There is no commercial value at this moment even though the breed has some great attributes that those that cross would find beneficial .
Too new a member to comment
Female Scoring
A good list of available AI straws and prices
More advice for novices
A monthly membership fee would be good. Instead of a lump sum.
Bull Assessment and Promotion of the Breed as commercially viable
Market qualities of breed better I.e easy calver, longlievity, less cholesterol in meat quality of meat.Ideal for crossing.
More events and activities nearer Cumbria
move the october sale to stirling and include unaltered and commercial highlands and cross cattle. The producers desperately need a dedicated sale at end of grazing season to sell fat, finished and weaned calves before winter like every other breed. the Oban HCS october sale does not and never will fulfill the needs of commercial highland cattle breeders.
Try and get a good and eastblished beef market out side the highland community and build up the general idea that highland are a good breed for costs against return
Promote the importance maternal side of breed for crossing to make more profitable hill cows.
I'd like the society to help new people who are new to breeding highland cattle ,farm visit, help to make sure your breed is correct and not breeding to close and advice and support
Reduce cost of later registrations - some cattle not worth registering as breeding stock but early signup at less money encourages this. Reduce cost of membership -msot expensive of breed societies Free advertising on website
Promote the benefits of the breed for conservation grazing. Also facilitate very small folds like ours (<5 animals) to participate in shows.
Promote the crossing benefits of Highland cattle c/f Ashmore Herd -immental crosses. Start to promote the breed as a commercial business not just as a hobby breed. If more farmers use them as a crossing breed then the pures will be required.
more support in terms of welfare.
More research / case studies in farming methods and cattle use . Also cattle input v's returns
recognise more the English folds and members.
try and get a premium for Highland Beef
Encouragement of higher standards in this iconic industry, especially where the bulls are concerned.
Have a sale in the lowlands and not just Highlands and Islands

N/A
Alot more aimed for young breeders
More commercial opportunities, More informed staff. Calling to ask about EBVs and being told they are not relevant to highland cattle is not the most professional service
BE MORE POSITIVE IN THE MARKETING OF THE BREED
I like the networking opportunities. I would like to see more aimed at smallholders and hobbyists. It would be good to have sessions about general health, breed standards as learning opportunity events.
Be more inclusive. Offer more help with the shows.
do more to encourage better breeding of commercial and profitable Highland cattle
I think that the fees are exceptionally high compared to other cattle societies.
Tell me how to best go about setting up a fold
More local events south of the Border
Help with showing
Try having sales in a more central environment "Oban" is just too far and incurred cost mean that you need to sell high just to break even
Far more information for the inexperienced farmer such as feed, abattoirs that take horned animals, foot health, mineral supplements, how to feed/when to kill for marbling etc
MORE SUPPORT FOR NEW MEMBERS
I am now retired from owning livestock but would like the Society to vastly improve the quality of the bulls particularly. When I was showing (for 18 years) there were some very poor bulls on the circuit which inevitably leads to poor stock.
Promote the breed, perhaps try and find a new market for bulls/dairy bred - promote vigour and longevity and ease of calving - perhaps encourage some breeders to dehorn some bulls and try and get some dairy farmers to use on their heifers. X Breds highland cross calves could command a premium.
MORE INFORMATION ON BLOOD LINES. BREED IMPROVEMENT. MORE CENTRAL SOCIETY SALES.
Lobby on behalf of its members for abattoirs to handle horned cattle
The beef from Highland cattle is only bettered by wagu yet there is very little marketing exposure. The quality of the beef is not known to many people
Acknowledge that cross breeding with faster maturing stock is good for the Highland breed and the Society.
Making the sourcing of High Health Accredited (BVD, IBR, Lepto, Johne's diseases) pedigree Highland cattle as easy as possible - including quarantine and transportation Europe-wide.
More emphasis on marketing both meat & store/ pedigree
Nothing more
Do more to raise the breed standard, do more to promote the Highland breed, do more to help raise the awareness and sales of Highland beef, do more to educate and inform of all the aforementioned.

Run a full time office to concentrate on the administration of the Society. It is absolutely paramount that registrations, transfers etc are done immediately and that emails and all other correspondence are answered on the same day. Our website and database should be updated daily and social media used to keep Members abreast of news etc. The Society should not get involved in Breed Promotion, Showing, Open Days, Exhibitions etc as these are the province of Breeders.
facilitate the setting up of new opportunities to sell pedigree and cross animals.
Promote the meat side
Improve the quality of cattle which members breed and market and improve the commercial appeal of the breed.
Improve diversity of DNA in herds, AI has made it more difficult to find unrelated animals and although there are excellent animals within less known herds, herdsman should be looking to help these smaller herds demonstrate the quality of their stock and therefore improve the breeding base.
Encourage where to sell our Highlands into for meat so if all the breeders in Worcestershire had 1 agent to help sell the meat on to restaurants etc we would hold more highlands
Be less scotphobic and recognise the market is bigger than Scotland and there is considerable interest in England
Concentrate on the breed to improve the opportunities for a finished product and market to give the membership and the commercial producer confidence to invest in some way in highland cattle instead of worrying about how it does in a show ring against other breeds worry about how it does in the real world with climate, conditions and topography because no other breed comes close
Obtain slaughtering and outlet for highland beef.
only accept quality stock for registration and give good quality Highlanders credibility they do not have
Commercial and professional approach to marketing highland beef
Promote the highland beef more, locally
Involvement with other organisations to promote native breed as a whole, and possibly working with FAS, again to highlight the importance of native breeds.
Listen more carefully to views and opinions
Scotland too far away to travel for me
Improve the marketing of the breed
market highland beef
Acknowledge that we exist !
Discount fees for large folds
Free advertising on the HCS website as part of your subs. Transfer ownership on pedigrees at a vastly reduced rate to the current on.
GIVEN THE RESOURCES AVAILABLE TO THEM, THEY ARE PROVIDING A GOOD ALL ROUND SERVICE.
Register pedigrees only
Marketing of the finished animal. Very limited opportunities and very few abattoirs who will take horned animals
Needs to market beef better. Need to get slaughterhouses to accept highlanders.

Generate a market for the meat on the hook. more of dovecote. to get rid of less good animals.
To help restrict Or eradicate altogether line breeding. Had a really bad experience with another breeder a couple of years ago who didn't disclose he practices line breeding before I purchased two heifers from him
Make the breed more profitable
Source a market for highland beef
continue
more advertisement, bull improvement.
Market Highland beef and HighlandX beef nationally and intyernationally as a cooperative would do in France
Promote the commercial side of Highland cattle
Higher profile for the breed as beasts that do well on poor grazing and low inputs.
Offer contacts to HC breeders worldwide
More training and support for newcomers, continue to market the breed for commercial purposes, continue to highlight the need for standards in the breed.
no more than they do now
Promote the commercial value of the Highlander as a producer of crossbred females that need no housing- A more sustainable suckler cow
Listen to advice from experienced breeders instead of part time amateurs
Take full advantage of the breeds known advantages and recognizable image to market it well to improve prices of animals and beef.

## Appendix 16 – Member’s opinions of the breeds benefits

<b>Question 13 – Are there any other benefits of Highland Cattle?</b>	Total
<b>Summary of themes</b>	
Most important attributes	
Environmental Management	6
Good at navigating challenging countryside	2
Small animals less damage	5
Conservation grazing	5
Healthy Meat	2
High meat quality	6
Iconic Breed/animal beauty	20
Tourism	15
Potenital for rugs	1
Low Inputs	9
Grass Based System (Low quality)	8
Easy Calving	14
Mothering instincts	9
Temperament	17
Long life span	4
Hardy	10
Low maintenance	11
Low winter feed requirement/outwintering	7
Adaptable	4
High butter fat milk	1
Make good cross breeds	12
Networking	1
Cheap to buy	1
Highland Cattle society are a benefit as support novice keepers	1
Good standard of showing competition	1
Good for smallholders/Novices	2

They encourage positive engagement from members of the non farming community and this gives opportunity to promote sustainable farming practises like conservation grazing where there is a wildlife/ landscape benefit.

Only this week a walker also stopped me to tell me when she sees my cattle she finds it uplifting and it improves her mental health encouraging her to leave the house to visit them.

Tourism potential, easy calving .

Docility, mothering instincts, calving ease, hybrid vigor in crossbreeding

Great network of people to meet and lots of good competition in the show ring

1.Good temperament 2. long lived so replacement costs can be low 3. Good mothering instincts 4, Hardy 5. Can learn their territory quickly and pass on information to calves and younger cattle - very important in more challenging environments 5. not big cattle therefore can be less damaging on certain terrain than bigger heavier cattle and also, the breeding cows being smaller and lighter than most modern commercial beef breeds, means lower inputs ,6. high mobility - able to travel well and forage naturally in extensive grazing systems, 7. Excellent quality beef - especially from older cattle, with great marbling and flavour 8. Can be very useful for conservation management grazing - the other European countries latched on to this before Britain! 9. Very adaptable breed - can survive and thrive in an extraordinary wide range of conditions. So it is a very versatile breed 10. Bring benefits to tourism in Scotland as they are so iconic and everyone want to see a Highland Cow. This does not benefit the breed unfortunately - it would be nice if it could be capitalised upon in some way

easy calving

When crossed they easily rear a calf 50% of the dam live weight off hill land .

Can be outwintered, used on grazing not suitable for sheep or other breeds of cattle

Docility

Females are cheap to buy

I do not have enough time to go into all the attributes of the great highland breed, having said that thy do have much to offer as we enter a none subsidised agricultural era as extravagant over subsidised systems will become a thing of the past. Do not believe a damed thing any politician says in relation to the future of agriculture in this supposed united kingdom.

As a hardy dam for cross bred sucklers

They are the most recognised image of Scotland worldwide..they are, quite simply, our best ambassadors.

Look after themselves. Low maintenance.

They are the only breed which has a dry matter intake higher than 2.5% of liveweight.

Progeny respond well to intensive feeding because they are late maturing. Crossbred beef is equally as good as pure. Simmental cross highlands great hill cows both bred sim Bull to highland cow and vice versa.

The public love them and this makes it a great starting point to aid the sale of the meat

Easy calving

1. Environment management - conservation grazers. 2. Highlands grazing/trampling reduce wildfire fuel loads & risk of fires in upland areas. 3. Iconic species for tourism across Scotland - attracts visitors. 4. Lower winter feed inputs required relative to other breeds - will thrive on plant species found in uplands / mountain areas. To be certain Highlands are getting adequate nutrition during the winter months, it is essential to provide concentrate to supplement their daily intake of forage from the mountains, but I have been surprised how well adapted highland cattle are to feeding from low nutritional value plants in the winter, such as sedges, coarse grasses that would be unpalatable to fussier commercial breeds. For me, these are a few of the great (frequently underestimated) plus points highlands possess over other cattle, that make them perfect for my upland holding. In concluding, I'd like to make a comment about question 17 (below). I have no interest myself in breeding or buying cross bred highland cattle. However I appreciate there is a commercial market for hardy cross bred Highland cattle. The farm right next door to me, has a small herd (12) of Dexter cattle. We often collaborate on 'farm projects', & share resources and know how. Three years ago, we put my highland bull to the Dexters, and the results, in terms of a really nice looking Highland/Dexter cross, produced with a view to meat - have surprised me. The hybrid is a nice looking animal, which appears to have taken the best features of both breeds - i.e larger, more robust animal. At two years old, reluctantly I have to admit, the Dexter-Highland cross is a fine looking beast.



<p>Good mothering instincts. Easy calving, easy to manage. Out wintering. Cross well with BSH.</p> <p>Cross breeding of Highlanders is a very important aspect of the breed by combining the natural characteristics of the Highlander with the more commercial and faster growing of the cross bred animal.</p>
<p>Mothering ability</p>
<p>Long lasting</p> <p>Able to deal with extremes of weather</p> <p>Feet coping extremely well with wet ground</p> <p>Able to cope with snow in March and didnt lose any calves- dont think you can stress as to how hardy they are</p>
<p>They look amazing in a field. Having them in an area where people don't see them often is a real privilege.</p>
<p>I don't think enough is made of their weight (i.e. very light compared to other cattle, i.e. easier on the fields) nor their ability to convert the roughest of forage compared to other cattle. They are extremely suitable for extensive farming which as got to be a very good point for the consumer.</p>
<p>as producers of excellent cross-bred livestock for cross-bred suckler cows or finished cattle</p>
<p>For us as a farm park they are impressive and different we have jersey belted galloways and british white cattle so a good mix from kids aspect.</p>
<p>Stops people wandering around the fields</p>
<p>Tourist Attraction</p>
<p>The beef is not just healthy but delicious!</p>
<p>FANTASTIC BROWSERS ANS WELL AS GRAZERS</p>
<p>Everybody, who has seen one Highland cattle, would remember, when he sees it at a second time</p>
<p>Easy on the eye!</p>
<p>Longevity, vigour, good on their feet if kept in right conditions. Eating quality is excellent if public were to be educated that a little bit of fat adds extra flavour - and it will not look like the red supermarket beef they are used to seeing, but reared, fed and handled properly prior to &amp; post slaughter the eating quality is superb.</p>
<p>Healthy.</p>

A great converter of low/ poor fodder or feed to flesh .

Easy calving

Great mothers

Longevity

Ability to stay outside all year

adapt to any system

Temperament and ease of handling, calving etc

easy calvers

easy management

Taste

Yes they also make great pets and suit hobby farmers and are part of our culture.

Tourism.

Quiet, easy to handle, very little time needed with the breed, easy calving and goods mothers

Natural land improvements

We are asked by woodland trust to graze new sites for a number of years to improve the state of There land and clear areas . They are very happy with the way our cows clear the sites with low general impact

Great tourist attraction.

For smallholders they're extremely hardy and docile, making them very easy to keep outside year round and ideal starter cattle. I'd also say the Highland Cattle Society are a benefit as they're so helpful and knowledgeable for novice keepers.

Ease of calving is the most important trait.

The mothering ability of the cow and the quickness of the new born calf to get up on its feet and suckle.

Milking ability and good udders most Important.

Hybrid vigour of the cross calf.

They are nice and tame cows

easy carving .and temperament

Habitats and protected species management usage.

easily managed low vet bills.

they suit grass finishing

Low maintenance to keep and great to look at from the house every morning . Need to be sold direct to restaurants really as dead weight isn't that high if you send to an abattoir but I don't have enough to sustain a contract with a local restaurant however as a group of Worcestershire we probably would	Attractive animals good for tourists
Great attraction for tourists	THE BENEFIT I GET FROM THEM IS ENJOYMENT IN OWING THEM, AND THE PUBLIC'S REACTION.
No concentrate feeding	When crossed with a Simmental pr Shorthorn and other more productive breeds the resulting commercial cow is excellent. We see this in the Luings a cross that has now become a breed that continues to expand. So commercial suckler production from the Highland should be talked about more. I could not answer yes to any of your questions about attending markets to buy cross bred cattle as we run a closed herd and breed all our own replacements. But if well marketed cross bred heifers should sell
Yes	Friendly lovely affectionate
They have a positive effect (mood enhancing) on individuals when seen, very photogenic.	Exhibitors, parkland enhancers, tourist photo icons lovely gentle temperament
one of the benefits and disadvantages of the breed is their intelligence and independence which necessitates sympathetic handling which is not always provided	Proven, adaptable, versatile, hardiness, nice to work with, pleasing on the eye, customers want more of them.
tourism	Hardiness.
Scottish I con .Tourism. Beef. Farm visits to see the cattle for the public.	No
Use of marginal land	Non aggressive, good mother's, good temperament. Pure breed
The beauty of the cattle	Status symbol for landowners, owners of large house/estates and financiers
meat is of high quality when allowed to grow on	Extremely hardy
beauty and hardy	They can be out-wintered - resulting in savings for straw etc.
Temperment	They will live outside all year long.
Ideal low input, excellent conversion, maternal traits.	Temperament.
an ability to cross favourably with other native breeds	Easy on the eye but that only seems to equate to postcards and calendars. Tourism.
Tourist attraction. Quiet and easy to handle. Calve without supervision	Highland cattle are one of a few breeds that sustain both there growth for meat with smaller input and also consistency of milk quantity and quality all year round reducing the need for supplementary feeding which often is un-environmentally friendly and contains additives that many people are wanting to move away from.
Very photogenic. Very passive. Lighter on wet ground. Skins are worth a good deal but we need HCS to invest/support a specialist tanner in the UK.	
They look nice	
AS A CROSS SUCKLER BREED. GIVING MORE OF A COMMERCIAL VALUE.	

There seems to be many anomalies with the marketing of the highland breed. Firstly, the majority of breeders are small scale hobby who push the environmental aspect of the breed and yet their animals we fed on high quality grass. Along with copious amounts of feed. Secondly, the iconic state of the breed is not what is being produced as a cow. The iconic picture of a highlander halfway up a mountain is not where they are grown and is misleading. Again, a low input regime of production is not happening as the breed is required to produce a carcass that it cannot do on a low input, iconic system. I have put my comments here as there appears to be nowhere else in this survey to add these points.

With the right stock, ease of management, ability to calve unaided.

Easy calving

The general public adore them, you've only got to see how much manufactures capitalise on outing here pictures on items like home furnishing cushions, cups, canvas prints, and even the White Company has a cuddly toy called Harly which of course I've bought for my newly born daughter 😊

Great for crossing to produce maternal cows

easy calving

Low cost

Generally very healthy, dont need assistance calving.

Better general Image of agriculture

Outwintered, calving ease, good mothers, good tasting meat

higher stocking rates, good crossing traits, hardy, meat full of omega 3, high butterfat milk

Environmentally friendly and utilise areas of land no other breed cans lower carbon footprint than other breeds

You can taste the difference

low maintenance, reduced need for housing,

## Appendix 17 – Member’s opinions on increasing the commercial viability of the breed

Most important factors

<b>Question 11 – How do you see the commercial value of the breed being improved?</b>	<b>Total</b>
<b>Marketing general</b>	<b>7</b>
<b>Marketing Product</b>	
Marketing the beef	15
Grass fed = marketing point	1
encourage breeders to add value to the product themselves	8
Year round marketing	1
Premium Schemes (Morrison's) society organised	3
Local promotion	2
lobby for buy british post brexit	1
demand pull for Highland Cattle	3
<b>Marketing Breed</b>	
Promoting Breed Attributes	9
Low input	14
Data to support low input/ commercial claims	1
More Sustainable meat	1
Don't compared to other breeds	1
Environmental management	5
Use in hill farming	5
Crossbreeding vigour	20
Market pedigree	4
<b>Practical</b>	
Help sourcing quality animals year round	1
Commercial availability of animals	1
Lobby for more native breeds	1
Help breeders produce good animals	8
Improve breed quality/ retain high quality	6

<b>Getting to Market</b>		
Export potential		1
Access to market - improved links within supply chain		2
Facilitate a Co-operative		2
Help to link small herds together		1
Slaughterhouses		0
	Lobby to accept horned beasts	1
	Encourage dehorning in those animals not to be used as breeding stock	6
		0
<b>Not Commercially viable</b>		3

Showing all 110 responses [Show less](#)

by marketing the quality and taste of the meat and the fact they are low input cattle

Post brexit less intensive farming systems may require a lower input commercial animal this improving the value of highlands when used for crossing with shorthorns for example

Securing a supply chain demand and added value

By improving the marketing to encourage the commercial farmers to buy the pedigree and cross bred animals.

Better links to wholesale industry, more slaughterhouses that will accept horned beasts

Pushing the easy care and outwintering aspects of the breed as a solution to paying for expensive straw for larger continental cows.

1. Develop a strong political voice to promote the economic and environmental value of low input hardy hill cattle - possibly in conjunction with other native breed societies. Food security will be an issue at some time in the UK and a more sustainable use of upland areas for meat production could be critical. Policy makers need to be more aware.

2. Promote the value of the Highland cow as a first cross for production of upland suckler cattle

3. Find ways of supporting the market for pure Highland beef through promotion and a real understand of how the meat market works. The true value of the store steer calf is not reflected by the low prices breeders often receive. 4. The unique characteristics of this breed need to be highlighted - it should not be in competition with other breeds - nor should it seek to emulate other breeds of commercial beef cattle in terms of size.

making the highland cow more available for breeding commercially

Promote and advertise the breed to commercial hill farmers, most think the cow is no better than a decoration to the hill side. its no use putting on an open day and just telling members as so often happens. to do the job properly involve the commercial farming organisations.

Promotion of highlands as the low input, out all year round hill grazing Beef producer

Marketing magic

Tie up with other native breeds such as beef shorthorn to market the cross bred female and add value to steers via premium schemes such as morrison's.

THEY HAVE ALL THE ATTRIBUTES NEEDED FOR LOW COST HIGH QUALITY BEEF PRODUCTION INVOLVING MINIMAL CAPITAL EXPENDITURE.

Avoid supermarkets do your own marketing in your own area. I used to market 250 highland steers every year through our own farm shop and farmers markets, there are no short cuts, if you want a premium price you have to put in the work, do not leave it to others as nobody knows the product better than you !!!!!!! in other words the breeders them selves have to get of there backsides.

As mentioned above previously we need to look at dam registered highland beef to widen our market.

Development of EBVs as a suckler dam

Identify it with the Scottish brand both for visitors and Scots.

Cross cows not good enough for pedigree job with a Shorthorn. Be more selective with pure breeding. Look more into GENETICS.

The most important role is in breeding easycare cross cows. Highland beef is good but so is first and second cross.

By establishing general public awareness of the organic quality of the meat

As feed prices increase the true value of native cattle will come into their own.

Low input systems and hardiness

Make it easier for small producers to supply their meat to the public	Utilisation of marginal ground , more extensive ranching type systems
Promoted as a hardy suckle cow to cross breed calves. Able to live out doors on poor pasture.	with selected cross breeding.
Taste and health benefits	get a premium
By marketing better.	Higher standards in the industry led by the Society.
Education of the public regarding superior taste of highland beef	Not sure
you've got to cross with a shorthorn or Whitebred for the commercial breeder to buy the offspring. There is effectively no market for the pure bred animal in the commercial market. However a number of fatteners buy young highlands cheaply because of limited commercial demand and fatten them for Waitrose paying below true market value for the young stock.	Better marketing as a multi purpose hill cow
At this stage not much	Better quality of finished animals
A lot of hard work by the society.	BY MARKETING. BY CONVINCING FARMERS THAT IT IS NOT A "HOBBY" BREED
Producing high quality cows for cross breeding. Dehorning would make the breed more user friendly. But it would take away from the iconic appearance!	As someone who is based near London and the wealth of restaurants it offers. I think Highland meat has strong potential as a fashionable meat due to it's lean nature. I expect to see an increase in meat in fairly low order volume but premium prices.
More help marketing highland beef from farms and wholesale very hard as highland beef is quality witch comes with a price as it's slow growing	Better marketing is required.
Marketing and promotion of benefits of the meet. Everyone knows about Aberdeen Angus but no one knows about Highlands as meet	improved breeding leading to commercial cows for the uplands and areas of poorer grazing and climatic adversity
The general public is becoming more educated on both the benefits and the taste of Highland beef. Other cattle beef breeders are now starting to realize the value of cross breeding with Highlanders.	Not sure we do not have the capacity to finish our calves so when they are weaned we move them onto another farm and keep replacements and AI our cows.
Promotion, Land use reform	Better marketing, with emphasis on hardiness, outside all weather, ecologically friendly, high quality natural bio product
Crossing with another breed and breeding them pure after that - as with the Shorthorns.	Not sure it could be in today's economic climate
All cows have to be de-horned before travelling to the killing house	Because of the way they are generally not intensively farmed gives it a sup
	Encourage breeders to display the breed not Overweight fat un workable animals
	Niche and targeted marketing. I sell prime cuts direct to a London Club that raves about the quality and can't get enough. The public is getting ever more interested in traceability, quality and welfare and we've got a great story but we're not exploiting opportunities.
	BETTER MARKETING OF PURE BREDS

outdoor Hardiness for nature keeping projects; long life, easy calving, calm cattle,
Mostly by crossing. A lot of breeders will not kill poor quality heifers, instead breeding from them which, with unsuitable bulls, weakens the gene pool. Highlanders are incredibly milky but the cows need to be dehorned to become suitable suckler cows, crossed with maybe a Shorthorn to produce a really good beef animal ! Some hobby breeders seem to think that the cattle will survive and produce a good carcass by living on fresh air.
Whilst they are very picturesque they are for obvious reasons not the easiest to handle due to their horns, pedigree breeders should keep the horns for the show and sale ring, although I think there would be a better demand for highlanders if they were dehorned. It is extremely difficult to get an abattoir in the south to take any adult cattle with horns - therefore reducing the price paid and choice of abattoir.
Access to market.
MORE HELP WITH MARKETING /SALES TO END MARKET, POSSIBLY A COOP ORGANISATION
better liveweight gains and conformation scores
Marketing is the key one small producer cannot get the premium needed to produce beef from such a slow growing breed. But if there was some form of co-operative this could help
I think breeding Grass fed animals would target the premium market
By accepting cross breeding as the most beneficial commercial activity whilst retaining respect for the pure breeders and exhibitors.
Great breed, cattle, hardiness and superb beef.
Helping find markets for registered stock that aren't halter trained or shown.
Not at all
Not by crossing them. No other breed society promotes the crossing of their breed. By promotion and raising awareness of the benefits of the Highland breed. To facilitate commercial sales. To do so need to ensure a good breed standard.
Move the Sales to Stirling

A bigger demand for Highland beef would increase the demand for Pedigree Highland Cattle. Positive advertising would make the Highland cow more appealing to the wider farming community. Particularly in the breeding of Highland cross cattle.
Difficult
Low input high output when crossed
quality cattle being marketed through the society as most members are too small to negotiate a contract.
Help with marketing and developing sales by linking smaller breeding herds to work together
For export to grow bigger carcasses
Promotion and data for each situation
only if there is differentiation between good quality Highlanders which are brilliant cattle and crap Highlanders of which there is a very high proportion can the breed fulfil its potential. It hasn't happened in 100 years and the definition of stupidity is to take the same actions and expect different results. Whilst other pure breeds have ugly or slow growers there is a market for them an end result the poorest Highlanders which are seen to a very high degree in this area are of no more value than cull Jersey cows
marketing focus of the breeds assets and probably cross breeding
Wherever the breed is situated promoting the highland beef more, locally.
Highlight the potential for the HIX from a high quality brood cow.
The highlander makes a great crossing cow she is easy kept over winter months and makes a great job of rearing her calf no matter what sire is used.
Promoting the niche benefits of the beef
consistency with judges opinions at shows all have very varied preferences
more crosses
Polled. Thinner hides, faster growth.
Promotion of beef
Come Brexit we need a concentrated government-backed campaign to BUY BRITISH BEEF
ONES GOT TO CONCENTRATE ON THE HIGHLAND BREED,AND THE BENEFITS OUR FIRST CROSS SUCKLERS.



<p>This is just my opinion - but I don't believe Highlands are a 'viable commercial' beef breed, they are too slow growing. Attempting to 'finish' a highlander in 3 years is simply folly - the animals is only half way to it's full carcass weight. There are other cattle breeds that grow far more quickly. I went into Highlands - primarily because they are one of the few breeds which are able to 'survive &amp; thrive' where I farm - in the uplands of Wales. They are well adapted for outwintering, they generally self-calve without the need for intervention, and can graze out in winter weathers which would kill other commercial breeds, like Limosins. As Highland breeders we need to market the breed's most obvious value - not just as a hardy beef breed - but also as conservation grazers. On uplands, highland cattle are perfectly adapted to reduce the potential &amp; risks of wildfires by their grazing habits/trampling bracken &amp; reducing the fuel load of uplands. We could collectively make more effort to gain recognition of common land grazing activity. It could be argued this activity is valuable to habitats &amp; maybe it should attract a 'grazing maintenance premium' from respective governments as part of BPS.</p>	<p>The breed has a strong potential if used in the uplands as a commercially sound tool to replace some sheep numbers for environmental reasons. It should be used and treated similarly to an upland sheep but one that allows mixed grazing and a very different grazing impact.</p>
<p>By educating the breeders to add value to their product and make them a attractive prospect . Dehorn . Present them at a store sale at a workable age and condition . Be ruthless , not everything is going to be a bull , but don't stick it out on the hill and forget about it . Plan each animals destiny and what needs to be done to get it there . So many have no idea what they are going to do with the bullocks or even the lesser quality females, they then present them at the store sale thin and too old to give someone time to finish them properly. I often hear " I/we/You can't finish a Highlander ..." been doing it for 17 +years , if you can', let someone else do it at the right time .</p>	<p>by getting commercially minded farmers to look at Highland cattle as a good economic animal</p>
<p>By demonstrating the ability of the crossing cow</p>	<p>Breed for commercial cattle and not just show cattle</p>
<p>Educating farmers of the big breeds e.g. Kim's, Belg blues, etc</p>	<p>Promotion for what the breed is best at. I.e. doing well on low inputs</p>
<p>Make it easier for small producers to supply their meat to the public</p>	<p>By marketing "naturally and healthy"</p>
<p>Promoted as a hardy suckle cow to cross breed calves. Able to live out doors on poor pasture.</p>	<p>More data and more focus on the taste - I know the commercial side of farming whether it be cattle, sheep or pigs looks at live weight gain but I think we need to focus on the quality of the carcass as well, not just how quickly you can get them to grow. After all a purely grass fed steer kept for longer has not cost more than than a steer stuffed with concentrates and will taste a damn sight better !</p>
<p>Taste and health benefits</p>	<p>more promotion of the beef instead of every body looking for a 18 thousand pound perfumed female</p>
<p>By marketing better.</p>	<p>Society focusing less on promoting shows And sales of pure bred and breeding a show animal and turn attention promoting commercial aspect and to breeding cow that produces commercial calves. Should be up there competing with Galloway cattle.</p>
<p>Education of the public regarding superior taste of highland beef</p>	<p>Breeding with better bulls</p>
	<p>Although I answered no to question 9 it needs some concrete data to be marketed to show the much lower input costs of the breed. My no to 9 is not no to willingness it is a no due the practicalities of doing it in by current setup. There are plenty members better placed to provide this info and they should be supported to do so. We also need to market the commercial side as it has always been very much in the background with the society in my time.</p>

## Appendix 18 - Member's opinions of potential future options

The top half of the table shows the actual frequency responses to the importance and future option. The bottom half of the table gives a total importance rating based on a scale of 1 – 5 to then work out an average importance for each option.

<b>Members opinion on the importance of potential future options</b>						
			Export	Breed improvement programme	Niche High value product	Crossbreeding
Importance Rating 1 - very unimportant 5 - very important	Importance Frequency	1	11	3	3	9
		2	21	9	3	11
		3	42	24	18	25
		4	39	42	53	25
		5	26	60	64	67
			Export	Breed improvement programme	Niche High value product	Crossbreeding
Importance Rating 1 - very unimportant 5 - very important	Total Rated Value	1	11	3	3	9
		2	42	18	6	22
		3	126	72	54	75
		4	156	168	212	100
		5	130	300	320	335
		Total	465	561	595	541
		Average importance	3.25	3.92	4.16	3.78

## Appendix 19 – Applying for a TSG

Submit a draft specification to the Defra outlining the following headings;

Product name – The suggestion here is to use ‘traditionally reared Highland beef’

Description of the product – what makes it have traditional qualities

Define the area for which it will cover.

Define how the product is produced - including raw materials, production method linking back to why the traditional production attributes

Nominate an inspection body who meet the UKAS accreditation scheme. This could be a private body or Local Authority Trading Standards.

The application will then be assessed if it meets requirements a meeting to finalise the application will be arranged before submitting to the EU.

National consultation – The finalised application gets published. Parties with a similar product will be notified, who can then object against the application.

Inspection from the nominated body to ensure that production methods meet the standards within the application.

Defra approves this, and it gets submitted to the national commission. This may take 6 months however will depend on their comments upon the application.

EU consultation – once approved at this level it is published in EU official journal. There is then a three-month window for it to be challenged.

Once approved then the product has indefinite protected status if continue to meet the three yearly inspection standards. The inspection body must inspect each producer before they can use the protected name.

For more information see -

<https://www.gov.uk/guidance/eu-protected-food-names-how-to-register-food-or-drink-products>

<http://webarchive.nationalarchives.gov.uk/20070506195406/http://www.defra.gov.uk/foodrin/foodname/pfn/intro/pdf/safeguarding.pdf>

## Appendix 20 - Recommendation - Producer Education Summary

<b>Recommendation</b>	<b>Implementation</b>	<b>Cost to implement</b>	<b>Time Scale</b>
De-horning – to make it easier to get into abattoirs for producers who are not interested in showing.	This could be through using the blogs and social media. As well as at training days – see the how to implement section at the bottom of this table for details.	This will be relatively cost free except for time to write the articles  The costs of adding this to existing training days will be relatively small as it will simply be explaining methods and practises.	This could be initiated immediately, however to be fully included in training days and getting the guides online. Therefore, realistically will be short to medium term.
Finishing – to improve the output of current producers	Using blogs, finishing guide and social media to demonstrate the importance and methods of properly finishing cattle. This can be based upon a few case studies of the best producers.  It could also form an element of training days.  See the how to implement in the section below.	Same as above.	Same as above.
Regional Producer Groups – to help provide continuous supply and brand building to achieve access to niche markets achieving premium prices	This could be done through informing members of the benefits of forming groups – better supply, benchmarking and best practise sharing, building of a brand.	This area is not particularly a costly recommendation however is more organisational. Therefore, the main cost shall be though the time taken to carry it out as opposed to any major expense.	This is more of a long-term strategy as it will be time explain to current producers why this would be important and could be beneficial. As well as gauging interest, collecting names and put

	<p>Followed up by sending out another survey to gauge interest and collect details of those interested and try to group together and put them in contact with each other. Recommending taking advice from the online guides and training days geared towards starting and developing a brand and selling direct to consumers and businesses.</p>		<p>people in touch with each other.</p>
<p>Educating and encouraging current producers on Performance Recording</p>	<p>Encourage members to join schemes such as Signet to begin performance recording cattle to identify areas for improvement.</p>	<p>Cattle Crush (specific for Highland Cattle): £2,515.00 (Ritchie, 2015)  Weigh Scales: £1,227.00 (Oakley Weigh, 2018)  Signet Costs:  £140.00 per breeder  £5.00 per cow  £6.00 per cow for ultrasound scanning, minimum £175.00 per visit.  Additional data analysis fees are covered by AHDB (levy fee) for producers in England, Scotland and Wales. £95.00 for producers based in Northern Ireland (Signet, 2015b).</p>	<p>Whilst initially, performance recording can begin relatively quickly if producers have the financial capability to purchase the equipment and start the scheme, the actual benefits of performance recording will be a long-term objective.</p>
<p>Targeting upland farmers with the benefits of Highland</p>	<p>The methods used in the rearing of Highland cattle are associated with low-input,</p>	<p>The environmental management benefits of Highland cattle can be</p>	<p>This likely to be a medium-term objective as the UK Agricultural Policy will take</p>

<p>cattle for environmental Management</p>	<p>environmental management techniques and therefore could be used as a promotion tool to increase the use of the breed. The new UK Agricultural Policy may also look to promote environmental management as part of future agricultural production and therefore HCS could look to request that the Government provide financial incentives for producers using Highland cattle for low input beef production or use it as a marketing tool to promote Highland beef to consumers.</p>	<p>promoted to consumers and producers at agricultural shows and events at relatively little cost.</p>	<p>time to be decided upon and implemented and grants will be difficult to apply for. As well as this, it can take time to change consumer and producer perspectives.</p>
<p><b>How to implement</b></p>			
<p>Increasing rearing practise through guides on private members area of the website and monthly blogs.</p>	<p>Having beginner guides on the basic rearing practises, how to finish, showing technique, sales, will enable accessibility to all members. It will hopefully the raise the standards as people will be more educated on the best rearing practise.</p> <p>This can be supplemented with monthly blogs on things such as the benefits of cross breeding, de-horning of</p>	<p>The writing of blogs and guide content will require no additional cost apart from in time to write them.</p> <p>The main cost of this recommendation is the changing of the website to have a blog area and a private members area. If done professionally this could cost between £300-1000 dependant on the changes.</p>	<p>The content can begin to be written immediately. However, changes to the website may take longer to implement however this is still a short to medium term in how quickly it could be made effective.</p>

	<p>commercial animals and finishing. As well as This then educates members without directly telling them what to do. It just details the benefits of following certain practises.</p>		
<p>Training Days – The HCS do already do this aimed at new members however we feel there should be more focus on this as it is an important way to communicate with the members and help them to improve.</p>	<p>This could be aimed at new producers which has recently been launched. Suggesting the inclusion of the recommendations – encourage performance recording, de-horning for those not interested in showing, potentially crossbreeding for the more commercial minded producers. Also, on showing and sales technique. This aims to increase the standard of animals improving prices having the knock-on effect on increase sales.</p> <p>It is also recommended to put on training days aimed at building brands, targeting consumers, starting value added enterprises and targeting niche markets to achieve premium prices having the similar knock on of increased numbers.</p>	<p>The cost to implement training days is dependent on if they are run internally or through brining in professional speakers.</p> <p>The internal ones could be done much more cheaply basing it case study farms across the main regions, which may require payment to host. This would therefore mainly be the cost of time for a society member or council member to run. This is most suited to the practical rearing practise days.</p> <p>Bringing in external expertise may be more suitable for the business development day. This cost of bringing in professionals can range from £500-2000. However, these events could be charged at a discounted ticket rate to members in order to recoup some cost.</p>	<p>The inclusion of the recommendation into current training days could be relatively easy and quick to implement therefore is more short term.</p> <p>Starting a new programme of training days organising locations, speakers, advertising and members will be more involved therefore is a medium to long term aim.</p>

## Appendix 21 - Recommendation - Consumer Education Summary

Recommendation	Implementation	Cost to implement	Time Scale
TSG – Protecting the traditional status of the rearing acting as adding value marketing point.	Through submitting and application to Defra and then approved by EU commission if there is no objection.	<p>There is no cost in terms of submitting the application apart from the time taken to draw up application.</p> <p>There may be cost involved with the inspection body depending on who is chosen (Defra, 2006).</p>	<p>This is a long process having to wait for six months initially and then three months to challenges to be put forward once the application has been approved.</p> <p>Therefore, if the society wishes to do this there needs to be long term commitment to ensure it is successful.</p>
Helping consumers access the meat.	Improved links on the website to regional box schemes and members who already sell online or to butcheries.	<p>This section is already on the website however could be more interactive using a map. There also needs to be more sites to buy online, this gives them chance to look at the product and purchase online.</p> <p>However, this may require some website re-design to be attractive to consumers, which could be costly if not done internally. It will improve effectiveness and efficiency. Based on only one page of design the expected cost is likely to be approximately £500 (Redfern, 2017).</p>	<p>It may take a reasonable amount of time to gather more websites from members which sell the products online, as well as box schemes.</p> <p>However once this is gathered it is a relatively short-term action point which could be implemented immediately.</p>
Social Media – in order to increase the promotion of the breed to consumers.	<p>Using the Instagram account to aim at consumers.</p> <p>However, this can still link with producers who should be encouraged to submit photos to the</p>	<p>This is almost free to implement. The only cost is the time taken to run the account.</p> <p>It may be recommended to offer a monthly prize for the best photo submitted by the producers to encourage engagement.</p>	This could be started immediately therefore is a short term target.



	<p>society to use. Developing links with farmers and consumers and linking their own farms social media and websites if they sell meat. This increases the promotion for producers as well.</p> <p>It is recommended it is not just pictures of the animals but also includes pictures of steaks and recipes.</p>	<p>It may also be wise to encourage consumers to send pictures of Highlands they have seen while in the countryside. Also offering a monthly prize or gift voucher for meat.</p> <p>The best pictures could be made into a calendar which could be sold and then recoup some of the prize money.</p> <p>Overall this would not cost more than a couple of hundred pounds a year.</p>	
<p>Shows – making existing show stands at the Great Yorkshire, Royal Highland and Royal Welsh. To be more appealing to consumers to advertise meat benefits and breed.</p>	<p>Having more customer focus on existing show stands, through free tasters, potentially freebies and banners outlining the benefits – potentially interactive to encourage conversation.</p> <p>This will raise the profile of the breed in the consumers mind as a high-quality beef breed.</p>	<p>This will not add much additional cost as it is just adding to additional cost of having a show stand at these events.</p> <p>Banners cost – roller banners are £50-100. However, it may be worth having boards with interactive element for example getting consumers to have a free taster and then voting on how they score the taste.</p> <p>Tasters – This will require cooking and sourcing of product, this will need to be paid for and can be sourced from within the society. Freebies – these are generally positive however can be costly depending on the type of freebee. Logo bugs can be as cheap as 20p per unit (Sussex promotions, 2018).</p>	<p>This is very short-term option as it would not take much additional organisation.</p>

<p>Shows – Attending more customer focused shows</p>	<p>This gives opportunity to solely focus on advertising to consumers.</p>	<p>The cost can range from £500- £5000 for trade stand pitches depending on the event. As well as the additional costs of getting people to the event to man the stand and accommodation for more than one day shows.</p> <p>Therefore, due to the cost it is recommended that this would be a good strategy to take however the return from this by the society may be minimal. Therefore, seriously consider this option and it may be more cost effective to add to existing trade stands.</p>	<p>This would take more organisation, as the implementing of attending a new show would need more input than extending an existing trade stand. However, it would be possible to attend shows this season but is achievable for 2019.</p>
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