



Enquête auprès des consommateurs de viande bovine (projet BeefQ)

BeefQ Survey Industry Survey. Beef eating quality, current and potential future carcass evaluation systems.

Mots-clés : satisfaction, viande bovine, consommateurs

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Une enquête en ligne menée au Pays de Galles et en Angleterre a souligné la nécessité de mettre en place un système d'évaluation et de paiement sur la base de la qualité sensorielle de la viande bovine

Résumé :

Un sondage en ligne a été mis en place dans le cadre du projet BeefQ pour évaluer l'opinion des professionnels concernant la qualité sensorielle de la viande bovine et les systèmes actuels et futurs d'évaluation des carcasses. L'enquête a été menée en gallois et en anglais entre le 24 janvier et le 12 avril 2021. Au total, 165 réponses ont été recueillies dont 25 en gallois. La majorité des répondants étaient basés au Pays de Galles et en Angleterre et 34% des répondants étaient des agriculteurs. Dans l'ensemble, les répondants pensaient que les consommateurs avaient confiance en la qualité sensorielle de la viande bovine galloise. Cependant, ce n'était pas le cas pour un quart des répondants, dont un quart des agriculteurs. Cela suggère qu'une proportion significative des personnes impliquées dans la production de la viande bovine pense qu'il est possible d'améliorer la satisfaction des consommateurs de viande. La majorité des personnes directement impliquées dans la production et la transformation de la viande bovine était généralement d'avis que la production de viande bovine doit évoluer à partir du système actuel d'évaluation qu'est la grille EUROP. Ces mêmes personnes estiment qu'il existe un besoin d'un système d'évaluation et de paiement pour la qualité sensorielle de la viande bovine. Les opinions sur la manière dont un tel système devrait être mis en œuvre étaient plus diverses, une amélioration du système EUROP actuel n'étant que légèrement favorisée par rapport à un remplacement de ce système. Les répondants ont exprimé une préférence pour un système d'évaluation et de paiement sur la base de la qualité sensorielle qui devrait être mis en œuvre au niveau national au Royaume-Uni, soit par les organismes interprofessionnels, soit par une organisation indépendante. Les répondants ont estimé que l'administration et le financement d'un tel système était du ressort des organismes interprofessionnels, ou d'une organisation indépendante financée par l'interprofession. Les principales préoccupations concernant les difficultés à la mise en œuvre d'un tel système sont liées à la peur du changement et aux problèmes structurels de la filière tels que le manque de coopération, la répartition équitable des coûts et bénéfices entre les différents maillons professionnels et le manque général de leadership pour impulser un changement. Les avantages mis en évidence comprenaient l'augmentation des volumes de viande vendues, l'amélioration de la valeur-ajoutée au sein de la filière et la réduction du gaspillage grâce à la production d'animaux qui répondent aux exigences des consommateurs.

Abstract:

An online survey was conducted by the BeefQ project to gauge industry opinion on beef eating quality (EQ), current and potential future carcass valuation systems. The survey was conducted in Welsh and English between 24th January and 12th April 2021. A total of 165 responses were collected, 25 in Welsh and the remainder in English. The majority of respondents were based in Wales and England and 34% of them were farmers. Overall, respondents felt consumers were confident in the eating quality of Welsh beef, however, a quarter of them, including a quarter of farmer respondents, felt that consumers were not confident in the eating quality of Welsh beef. This suggests a proportion of those involved in the beef supply chain believe there is room to improve the beef eating experience for consumers. The majority of those directly involved in the production and processing of beef were of the opinion that the beef industry needs to evolve from the current EUROP beef valuation system and that there is an industry wide need to introduce a system of assessment and reward for beef eating quality. Views on how such a system should be implemented were more varied, with an extension to the current EUROP grading system being only slightly favoured over a replacement to the EUROP system. There was a preference for an eating quality assessment and reward system to be implemented at a UK national level, either by the levy bodies or an independent organisation. As to who would administer and fund the administration of an eating quality assessment and reward system, the levy bodies the most popular choice, or alternatively, administered by an independent organisation and funded by the levy bodies. The main concerns with respect to barriers to implementation of an eating quality assessment and reward system related to fear of change across the industry and supply chain issues such as lack of cooperation, fairness of cost/benefit within the supply chain and general lack of leadership to take change forward in the UK beef industry. Benefits highlighted included increased sales, improved value within the supply chain and reduced wastage through producing animals that meet consumers requirements.

I. INTRODUCTION

The beef industry is facing new challenges, with evolving consumer demands, among others, for guaranteed beef eating quality. To remain competitive, the European beef industry must become more aware of these changes, moving away from a basic, commodity type product, traded solely on price based on crude carcass evaluation. Indeed, there is today a disconnection between the consumer and the producer within the European Union, with no clear mechanism for delivering feedback from the consumer to the producer or to link beef retail price with cost of production or eating quality. This was highlighted by Normand *et al.* (2014) who found no clear relationship between the selling price of beef and its tenderness at the consumer end in France.

Currently in the European Union, there is no standardised procedure to guarantee beef eating quality. The European carcass grading system (EUROP), which is mandatory, was never designed to give an indication of eating quality, but provides a grade for carcass yield based on carcass evaluation of conformation and fatness (Monteils *et al.*, 2020). In practice, this system has encouraged the production of high yielding, low fat carcasses, as producers respond to this price signal. However, the system allows the beef supply chain to apply their own standards, requirements or brands on top of the EUROP carcass grading system. Official quality labels (such as Label Rouge in France) and branded products such as Waitrose in the United Kingdom, the well-known private brand Charal in

France and the new premium beef brand OR ROUGE by the French Beauvallet/C.V. Plainemaison company have a specific approach to quality, proscribing certain production techniques in addition to minimum fatness and conformation scores and other requirements (Codron *et al.*, 2005; Charal, 2013; Legrand *et al.*, 2021). A weakness in this approach is that multiple quality marks on products may induce more confusion to consumers rather than helping them in their choices at purchase (Bryla, 2017).

In this context, the ambitions of the International Meat Research 3G Foundation is to support the beef industry by offering an international predictive model of beef palatability, flexible enough to consider any local livestock characteristics or regional consumer specificity. This approach is supported by the United Nations Economic Commission for Europe, which promotes development of regulations and norms, technical cooperation, and exchange of best expertise and practices. This may also improve transparency for a better price signaling from beef producers through to consumers at retail (Hocquette *et al.*, 2021).

The aim of this study was therefore to assess industry opinion on beef eating quality (EQ), current and potential future carcass and beef evaluation systems in Wales considering the specificities of beef production and consumer expectations in this country and more generally in the UK.

II. MATERIAL ET METHODS

An online survey was conducted by the BeefQ project to gauge industry opinion on beef eating quality (EQ), current and potential future carcass valuation systems (Annex 1). The survey, hosted on KoBo Toolbox (www.kobotoolbox.org), was conducted in Welsh and English between 24th January and 12th April 2021. The survey was publicised via BeefQ and partner organisation social media channels, the BeefQ website and communications channels of key industry stakeholders represented in the BeefQ project (including YFC Cymru, Association of Independent Meat Suppliers (AIMS), the Institute of Meat, NFU Cymru and the Farmers Union of Wales). A total of 165 responses were collected, 25 in Welsh and the remainder in English. Of the respondents, 34% were female, 64% were male and 2% preferred not to say. Most respondents (40%) were aged between 35 and 55 years of age, 36% were over the age of 55 and 24% were

aged between 18 and 35 years of age. The age profile of respondents reflects the ageing rural population in Wales and England (Welsh Assembly Government, 2008). Responses in the Welsh language a slightly under-representative of the total Welsh population where 29% of people are identified as Welsh speakers (Welsh Government, 2020), however, 27% of total responses were from those in England where Welsh is not spoken. The number of male respondents is also somewhat overrepresented compared to the general population (Welsh Government, 2020) but is reflective of UK agricultural labour statistics which indicate 85% of farm holders and managers are male (Defra, 2016). This survey does, however include respondents from the broader agricultural industry as well.

III. RESULTS

3.1. Location of respondents

BeefQ is a Welsh Government funded project, but the majority of Welsh produced beef enters supply chains that operate across the border in England, hence it was important to gather opinion from across Wales and England. Most

respondents were from Wales (66%) and England (27%) (Figure 1), and “Other” included respondents from France and the United States.

Figure 1: Percentage (%) of respondents by location

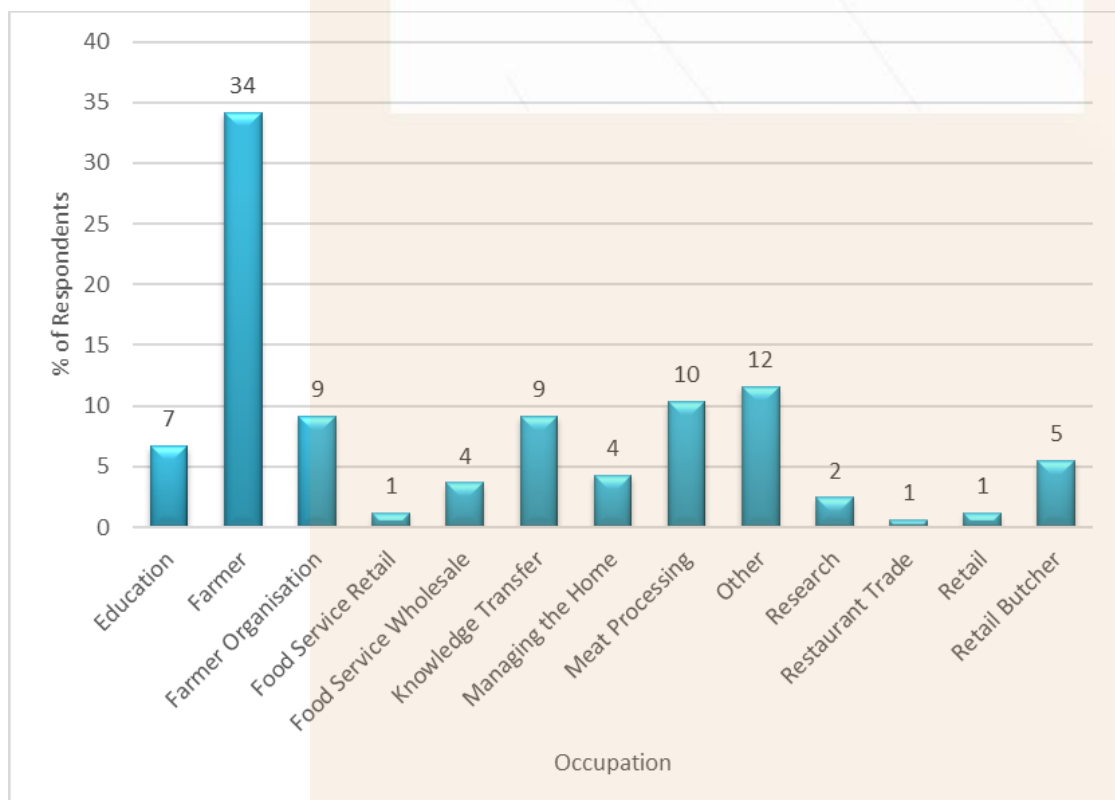


3.2. Occupation of respondents

Farming was the predominate occupation (34% of respondents, Figure 2) With meat processing, knowledge transfer, farmer organisation and education being relatively evenly represented. Food service and retail occupation

categories together contributed 12% of respondents. “Other” included civil servants, writers, PR, trade associations, retired from meat industry and the Carcass Classification Scrutiny Committee members.

Figure 2: Percentage¹ (%) of respondents by occupation (alphabetic order)



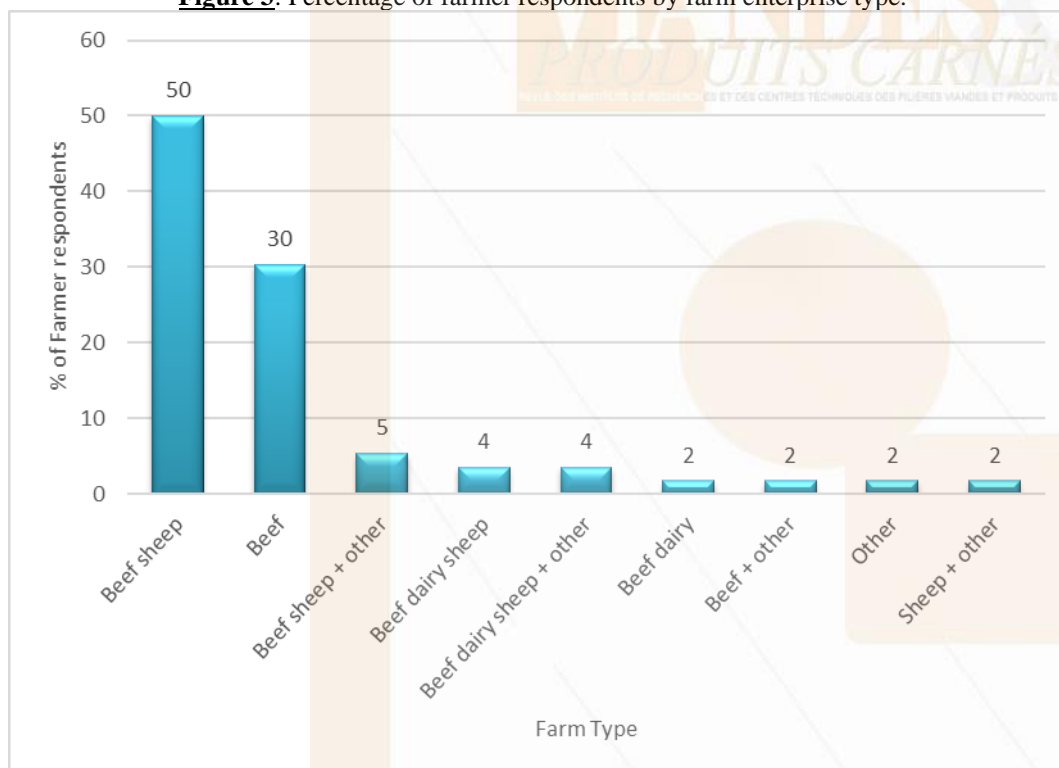
¹ Data presented in Figures are rounded to whole numbers.

3.3. Breakdown of farmer respondents by farm type

Farmer respondents were asked to specify the enterprises on their farm (beef, sheep, dairy and other (specify)). Multiple answers could be selected. Fifty percent of farmers identified as being beef and sheep farmers with a

further 30% identifying as beef only farmers (Figure 3). A total of 96% of the farmer respondents had beef cattle on their farm. The “other” category included arable, pigs, butchery, tourism, forestry, horticulture and poultry.

Figure 3: Percentage of farmer respondents by farm enterprise type.



3.4. Consumer perceptions of beef as a food product

Before engaging participants in questions related specifically to beef eating quality, the aim of the following questions was to gauge their views on the strengths and

weaknesses of beef as a food product and to determine where eating quality sat in the mindset of consumers when evaluating beef as such.

3.4.1. Positive quality attributes of beef as a food product

Participants were asked “As a consumer what do you believe to be the good points about beef as a food type and source of dietary protein?”. Using a thematic analysis approach, responses were grouped into 6 main themes. The dominant theme (with twice as many mentions as any other theme) was “High Nutritional Quality” which included reference to high quality protein, high vitamin, mineral (including iron) and trace element content, low fat and low carbohydrate content and part of a balanced diet. In previous studies these type of “health” characteristics have been classified as “credence quality attributes” as they cannot be directly assessed by the consumer (Oude Ophuis & Van Trijp, 1995). The second most prominent theme related to the “Eating Quality Experience” and included reference to good taste, texture, appearance, tenderness, and the consistency of beef as a product. These characteristics are described in the literature as “experience” quality

attributes and are experienced when the consumer eats the product (Henchion *et al.*, 2014). “Production quality” attributes were also mentioned, with reference to such things as being sustainably produced, high welfare systems, low food miles, contributing to the local and rural economy and the associated farming systems being good for the environment. These are also considered credence quality attributes as consumers rely on others to communicate this information to them (Realini *et al.*, 2013). “Accessibility” was a further theme that included the versatility of beef as an ingredient, convenience, and wide availability. The final two themes related to “Price” and “Traceability” however both were only mentioned infrequently. These could all be considered “extrinsic” quality characteristics, they are not inherently part of the product but would inform the consumer when searching for a product (Hocquette *et al.*, 2012).

3.4.2 Negative quality attributes of beef as a food product

Participants were also asked “As a consumer what do you believe to be the bad points about beef as a food type and source of dietary protein?”. Using the same thematic analysis approach, 7 broad themes were derived from the responses. Interestingly, the type of negative quality attributes mirror the positive quality attributes identified in Section 2.4.1 above. The dominant theme (twice as many mentions as any other) related to “Eating Quality Experience” and included topics such as dry, fatty, tough, tasteless, poor texture, not enough marbling and inconsistent eating experience, all “experience” quality attributes (Henchion *et al.*, 2014). The next most common theme (less than half the mentions of eating quality) related to “Health Risk”. This theme included reference to high saturated fat content, health/heart problems, carcinogenic, high cholesterol, low digestibility, obesity and the need to

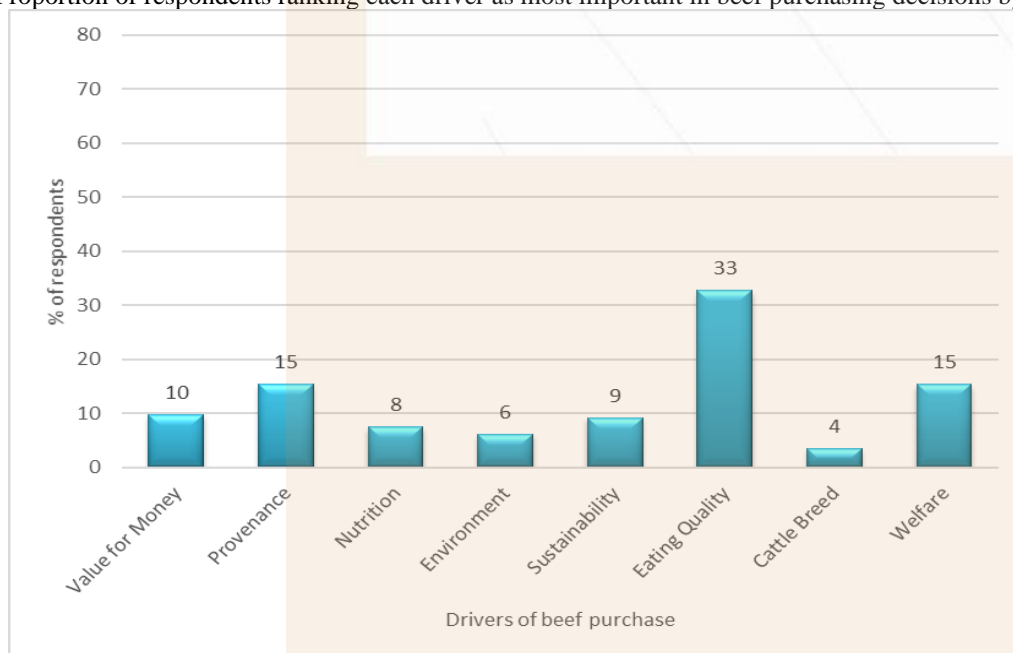
consume in moderation, all “credence quality attributes” (Oude Ophuis & Van Trijp, 1995). “Production Quality” including reference to intensive and unsustainable farming practices, use of antibiotics, high carbon footprint, poor environmental reputation and welfare concerns, and “Price” (high) were mentioned with equal frequency, both “extrinsic” search attributes (Hocquette *et al.*, 2012). The lesser mentioned themes identified related to “Consumer Education” and lack thereof, “Poor Processing Quality” (not hung properly, poor butchery technique) and “Provenance”, the latter two being “experience” (Henchion *et al.*, 2014) and credence attributes (Oude Ophuis & Van Trijp, 1995), respectively. Consumer education, or lack thereof does not, constitute a negative quality attribute per se, but perhaps results in a negative eating experience through poor cooking techniques.

3.5. Drivers for beef purchase

Participants were asked to rank the following drivers in order of importance to consumers when purchasing beef: value for money, provenance, nutrition, sustainability, eating quality, environment, cattle breed and welfare. The proportion of respondents selecting each driver as first choice (i.e. most important driver) is presented in Figure 4. Given the survey is about eating quality it is unsurprising

that this was most frequently identified as the most important driver, with provenance and animal welfare being of lesser but equal importance. Eating quality, or “experience” quality characteristics (Henchion *et al.*, 2014) is clearly a more important driver of purchase than “credence” characteristics (Oude Ophuis & Van Trijp, 1995) in this population sample.

Figure 4: Proportion of respondents ranking each driver as most important in beef purchasing decisions by consumers.

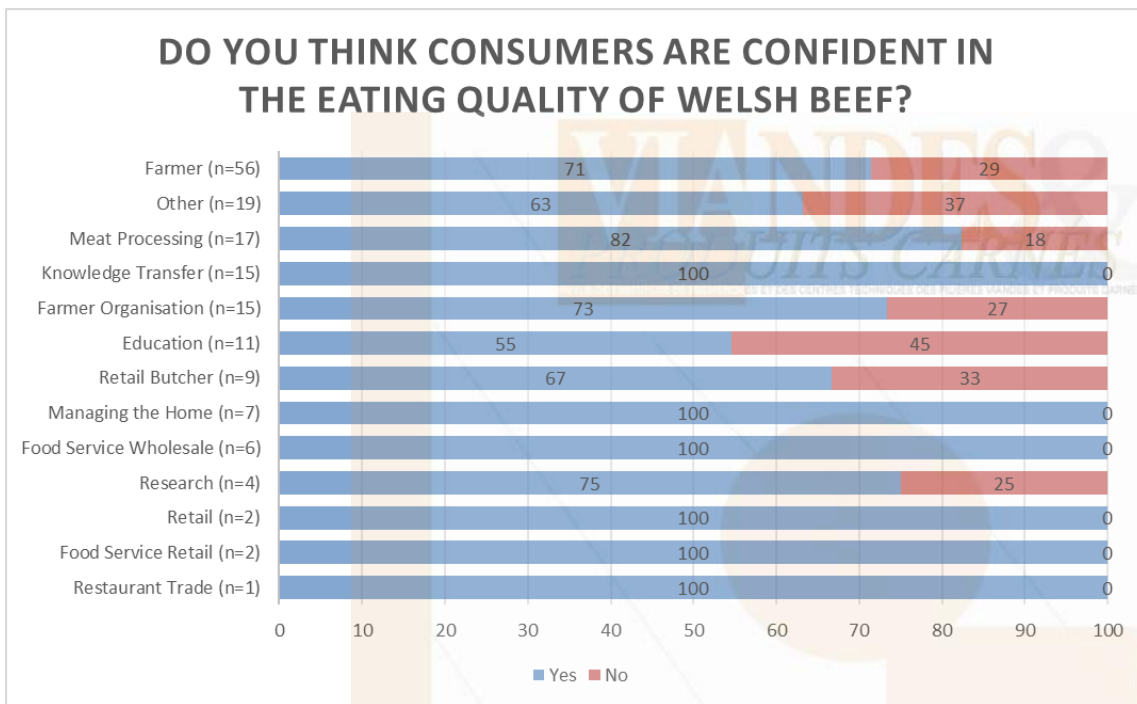


3.6. Confidence in the eating quality of Welsh Beef?

Participants were asked if they thought consumers were confident in the eating quality of Welsh beef. Whilst 76% of respondents thought that consumers were confident in the eating quality of Welsh beef, 24% did not. A report by Farmer *et al.* (2016) stated that consumers considered beef a luxury product, which was much appreciated, but that there was evidence to suggest it did not always deliver the expected quality. When views were broken down by

occupation (Figure 5), the overall results reflected the dominance of farmers in the survey, though several other occupation categories had a similar breakdown. Those in education tended to think consumers were less confident in Welsh beef eating quality (55%), whereas those in knowledge transfer, managing the home, food service retail (all 100%) and meat processing (82%), were much more confident.

Figure 5: Respondent opinion on whether consumers are confident in the eating quality of Welsh beef, by occupation (in %).

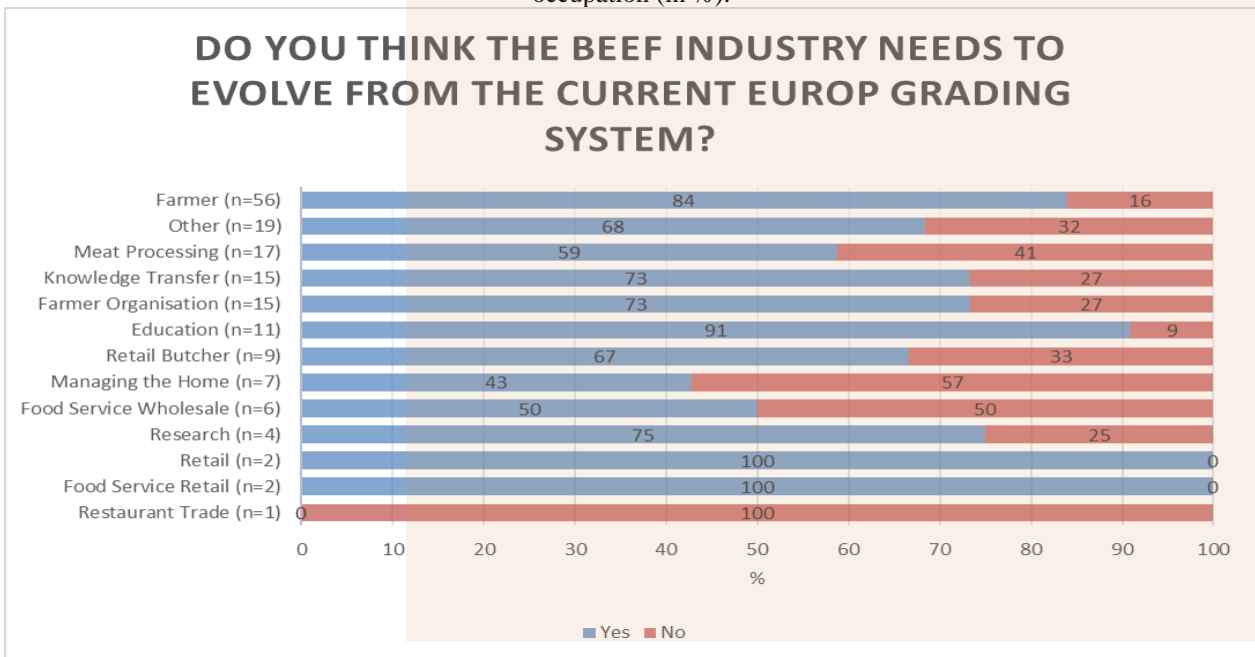


3.7. Need to evolve from current EUROP grading system?

Participants were asked if they felt the beef industry needs to evolve from the current EUROP grading system, to which 74% of respondents answered yes and 26% no. Despite farmers being in the main in agreement that consumers have confidence in the eating quality of Welsh beef, there was a strong indication (Figure 6) that they felt the beef industry needed to evolve from the current EUROP grading system – this is explored further in Section 2.9). Education participants were strongly in agreement of the

need for evolution from EUROP which corresponds with their opinion that consumers are not confident in the eating quality of Welsh beef (Figure 5). Those managing the home and in food service wholesale were less inclined to think that the EUROP grading system needed to evolve. This could be explained by their view that consumers are confident in the eating quality of Welsh beef currently (Figure 5) or could demonstrate a lack of knowledge or interest in current and potential grading systems.

Figure 6: Respondent opinion on whether the beef industry needs to evolve from the current EUROP grading system, by occupation (in %).

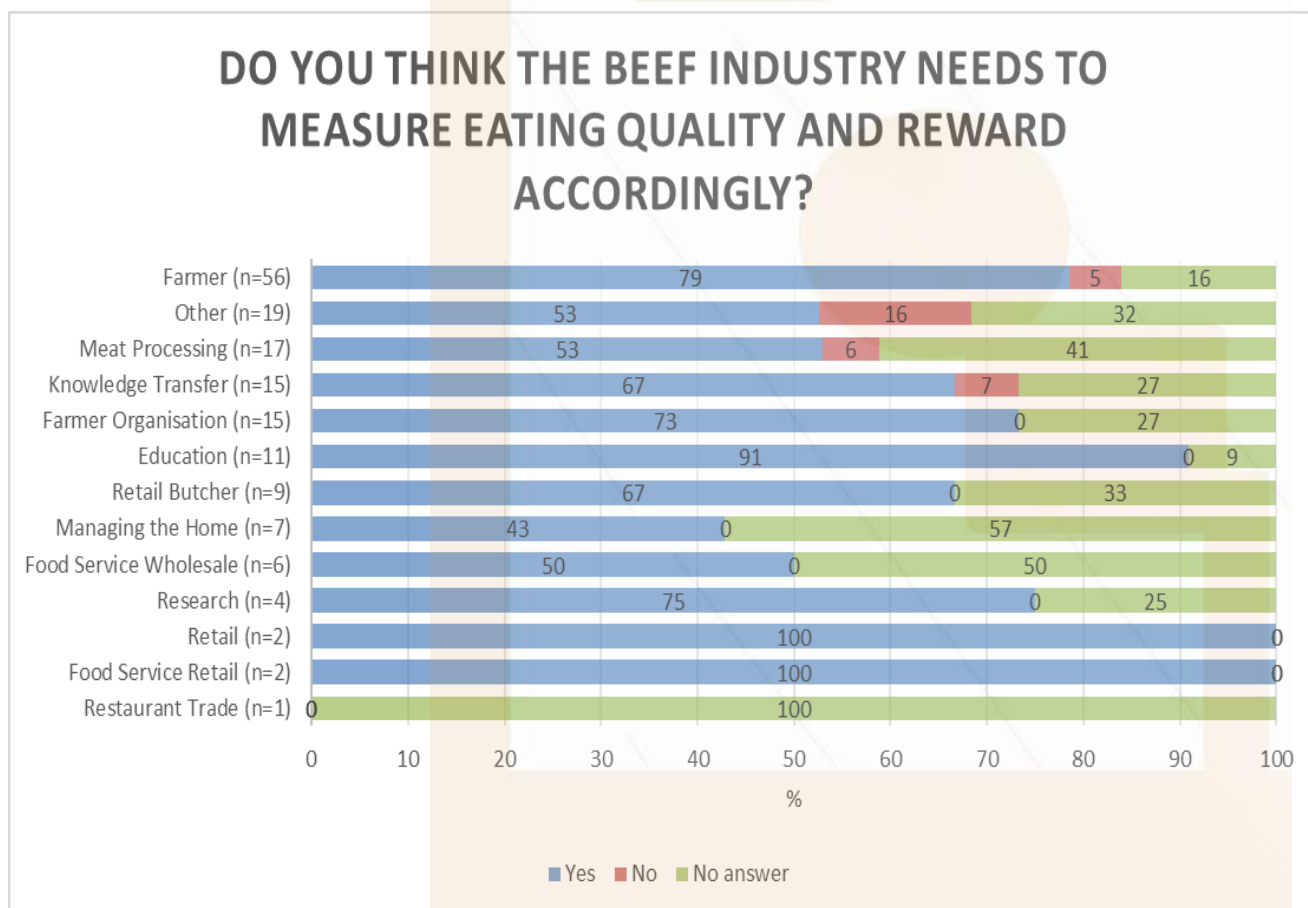


3.8. Need to measure and reward eating quality?

Participants were asked if they thought the beef industry needs to measure eating quality and reward accordingly, to which 69% responded yes, 5% no and 26% did not answer. When this is broken down by occupation (Figure 7), it is clear that some occupations had a better understanding (i.e. chose to answer) than others (i.e. left the answer blank), and

this may go part way to explaining the responses in Section 3.7). However, all answers may be not representative due to a low number of respondents. Again, there was strong support for a system that measures and rewards eating quality from farmer, farmer organisation and education respondents.

Figure 7: Respondent opinion on whether the beef industry needs to measure eating quality and reward accordingly, by occupation (in %).



3.9. How might a beef eating quality (EQ) assessment and reward system work?

Participants were asked how they would like to see a beef eating quality assessment and reward system work and were given three response options: an extension of the current EUROP system, a replacement for the current EUROP system and other (specify). The participants also had the choice of not responding. Overall results are presented in Figure 8 and it is apparent that views are divided, with only a slightly greater proportion of respondents stating they would like to see an extension of the current EUROP system than those preferring a complete replacement of the current EUROP system. A similar proportion of participants did not respond to the question. Of the “other” responses, several mentioned the Meat Standards Australia (MSA) system, two mentioned

valuation based on the system of production (e.g. high welfare, pasture based, low Carbon) and other suggestions included weight of useable meat and taste, a complete reform of the EUROP system to include other characteristics and finally that two systems (EUROP and an eating quality system) need to run along side by side.

Research by Bonny *et al.* (2016) identified that there is no substantial relationship between the EUROP system and eating quality therefore if eating quality assessment is desired, it would need to be done in parallel with the EUROP grid.

When broken down by occupation (Figure 9) no clear patterns were discernible.

Figure 8. Respondent opinion on how they would like to see a beef EQ assessment and reward system work.

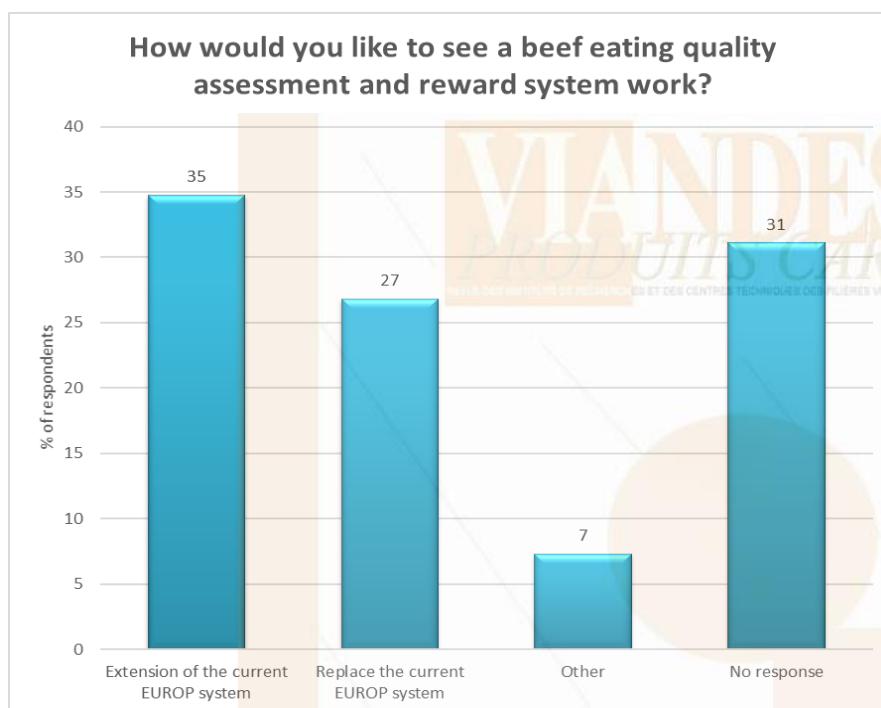
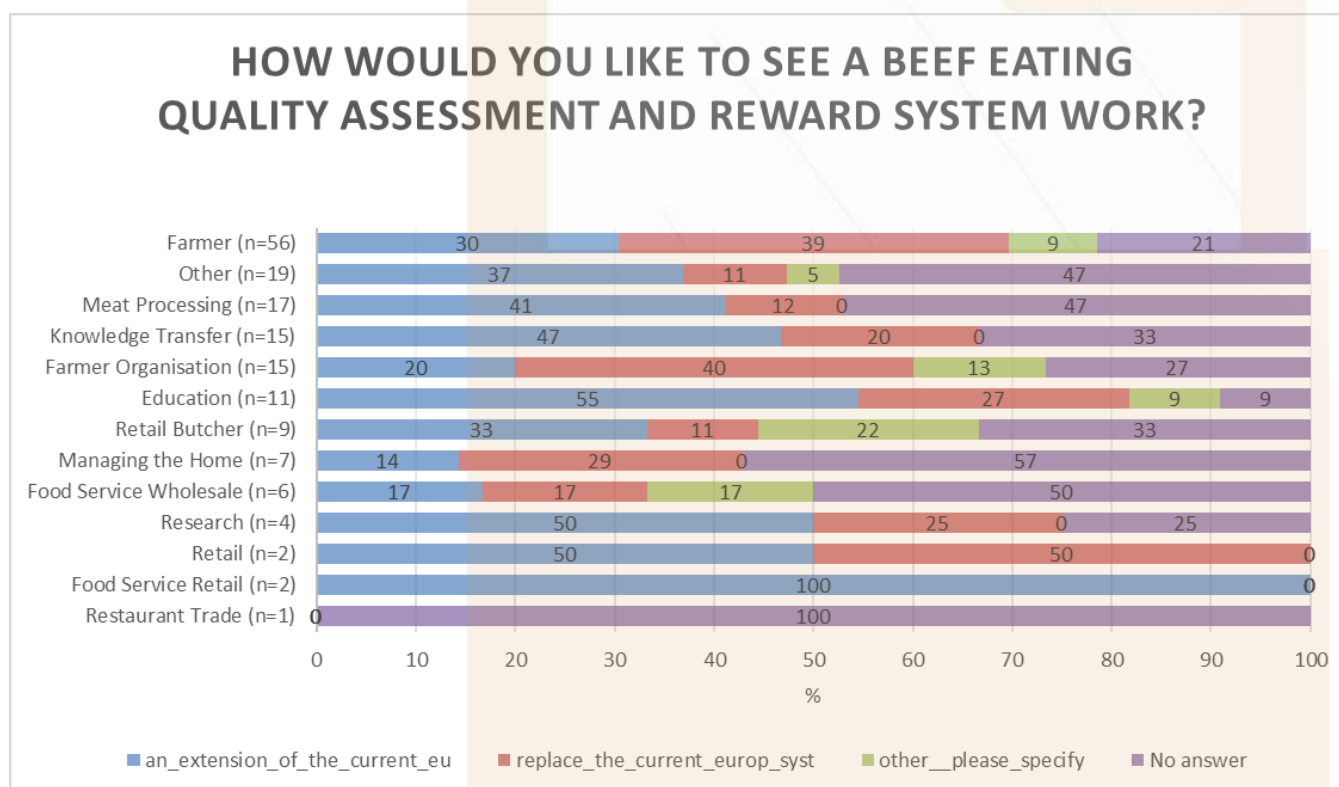


Figure 9: Respondent opinion on how they would like to see a beef EQ assessment and reward system work, by occupation.



Choices for this question were: an extension of the current EU grading system (in blue), replace the current EU grading system (in red), other suggestions (in green) or no answer (in purple).

3.10. How might a beef EQ assessment and reward system be delivered?

Participants were asked how they would like to see a beef EQ assessment and reward system delivered and given the following response options to choose from: UK national level, Welsh national level, processor led, retailer led or other (specify). Participants also had the option of not

responding. Figure 10 indicates the majority of respondents would like to see such a system operating at the national UK level (38%) with a smaller proportion (17%) at the Welsh national level. A large proportion of the participants (31%) chose not to answer the question, again perhaps indicating a

lack of depth of understanding as to how beef valuation systems currently operate or might operate in the future. Comments in the “other” category included ensuring farmers have a voice, producer and retailer cooperation with processors, process led by retailer feedback, lack of belief that a reliable beef eating quality prediction system exists currently and finally premiums for certain breeds (native breed base payment) and penalties for continental breeds.

Of the larger occupation categories (Figure 11), a UK national system appears to be preferred, the exception being the knowledge exchange category, where the preference was for a Welsh national level system. It is interesting to note that across all occupation categories, there is a relatively high proportion who choose not to respond, even in those high interest groups such as farmers and processors.

Figure 10: Respondent opinion on how they would like to see a beef EQ assessment and reward system delivered.

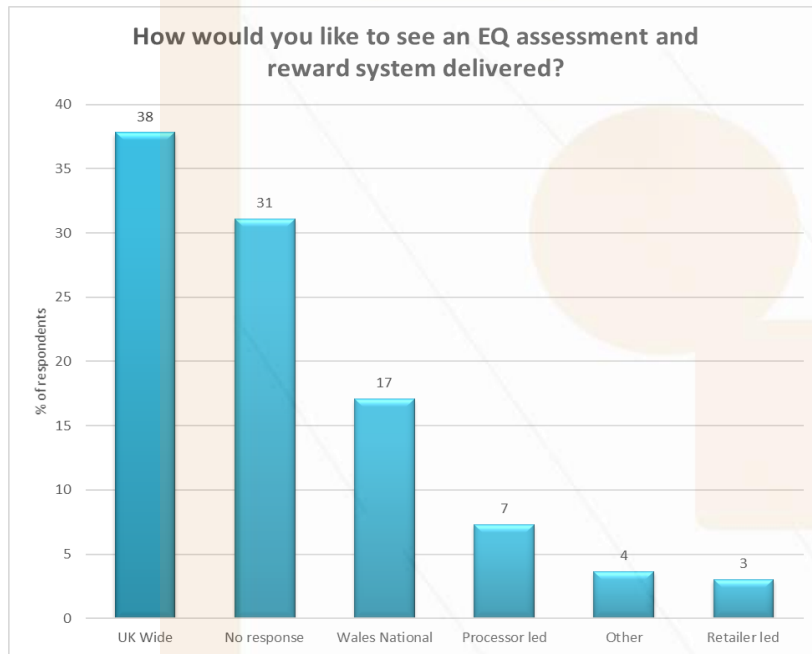
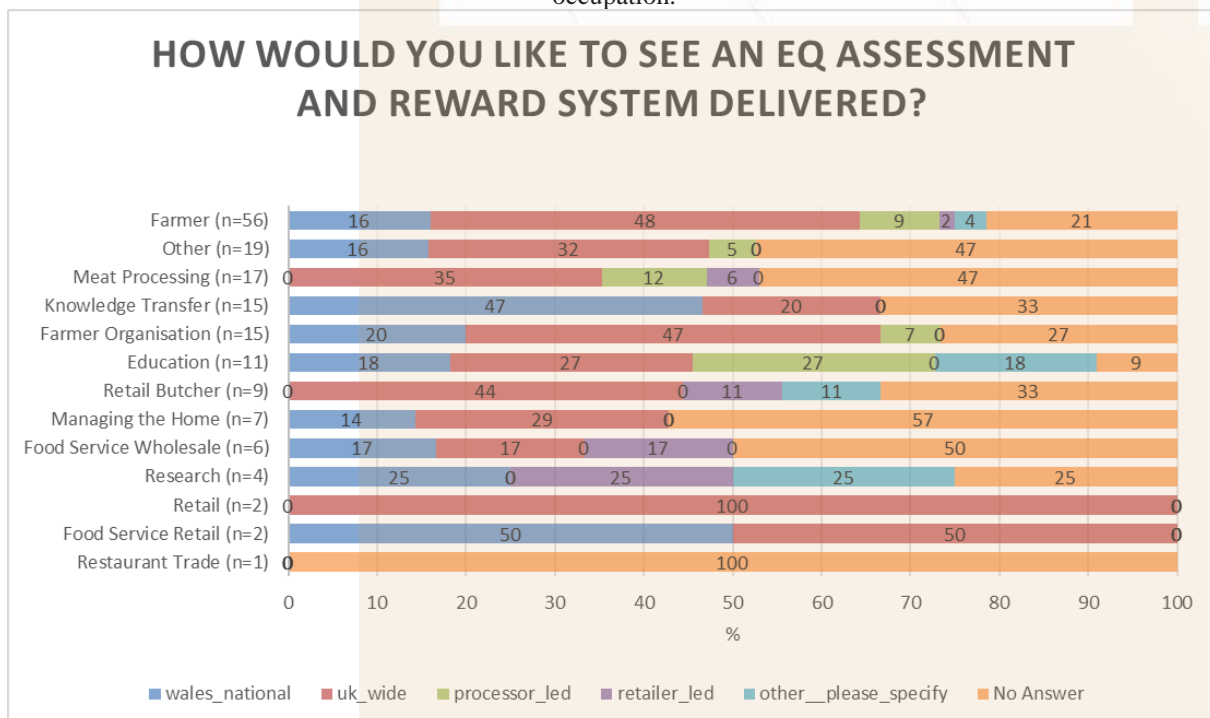


Figure 11: Respondent opinion on how they would like to see a beef EQ assessment and reward system delivered, by occupation.



Choices for this question were: a Welsh national level system (in blue), a UK national system (in red), a system led by processors (in green) or retailers (in purple), others (in blue) or no answer (in orange).

3.11. Administration of a beef EQ assessment and reward system?

Participants were asked who they thought should be responsible for administering a beef eating quality assessment and reward system and given the following response options to choose from: levy body, independent organisation, UK Government, Welsh Government or individual processors. Participants also had the option of not answering. Of those that responded (Figure 12) the majority were in favour of a levy body or some other independent organisation (24 and 20%, respectively) administering such a system. The choice of levy body, given

that they tend to be devolved, conflicts somewhat with responses in section 2.9 where there was a preference for a UK national system, however an independent organisation and UK Government (at 14% of responses) were still prominent choices. Again, a large proportion (almost one third) of participants chose not to respond.

When looking at responses by occupation (Figure 13), there is a mix of responses with no individual occupation category influencing the findings strongly.

Figure 12: Respondent opinion on how they would like to see a beef EQ assessment and reward system administered.

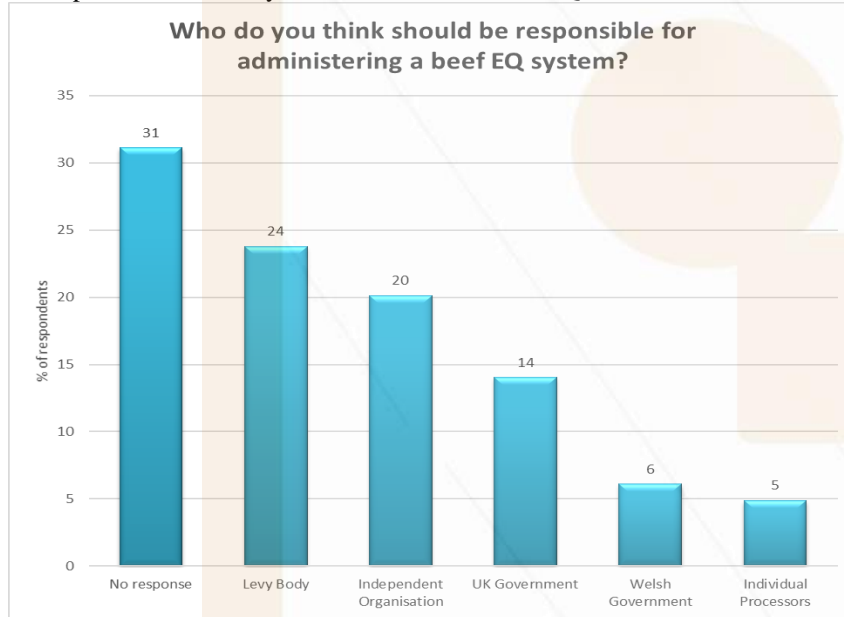
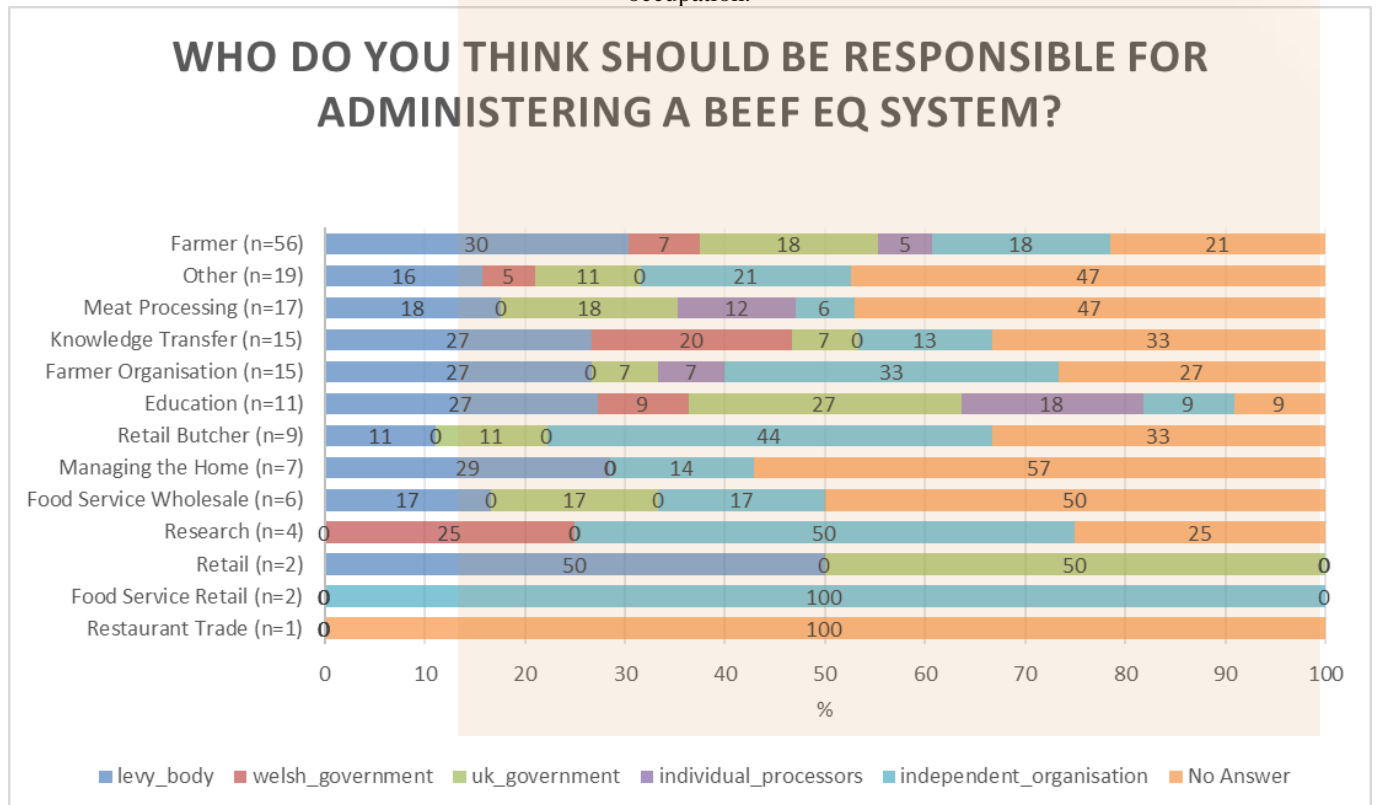


Figure 13. Respondent opinion on how they would like to see a beef EQ assessment and reward system administered, by occupation.



3.12. Funding the administration of a beef EQ assessment and reward system

Following on from Section 2.10, participants were asked who they thought should fund the administration of a beef EQ assessment and reward system. The same answer options were available: levy body, independent organisation, UK Government, Welsh Government or individual processors. Participants also had the option of not answering. Of those that responded, 26% thought the

levy bodies should be responsible for funding the administration of an EQ system (Figure 14), followed by the UK Government at 16% of responses. As with the previous question, a high proportion (31%) chose not to answer the question. Again, there was a mix of responses across occupations (Figure 15), with no individual occupation category influencing the findings strongly.

Figure 14: Respondent opinion on how they would like to see a beef EQ assessment and reward system funded.

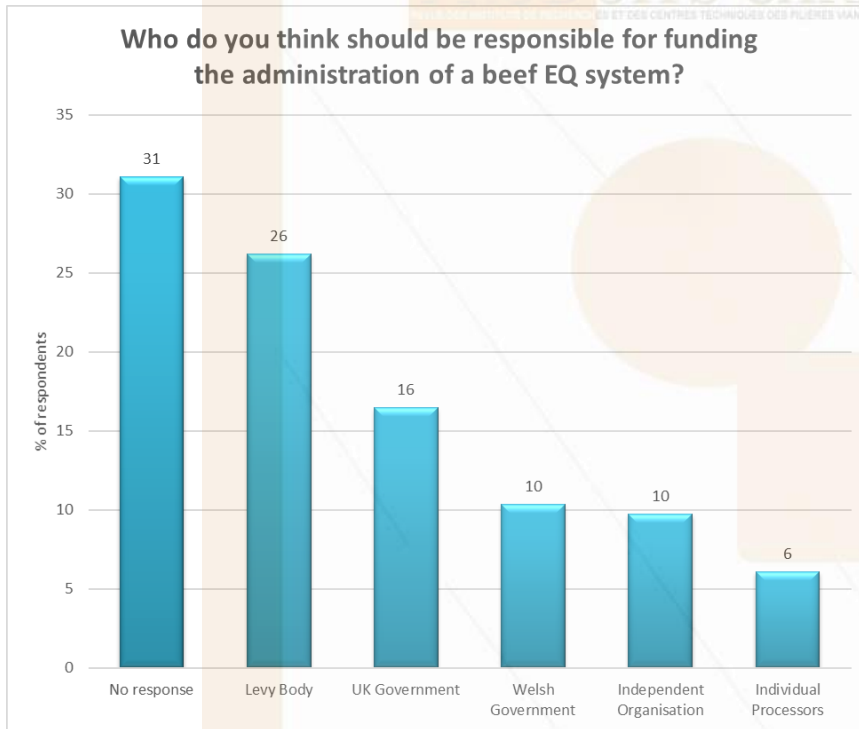
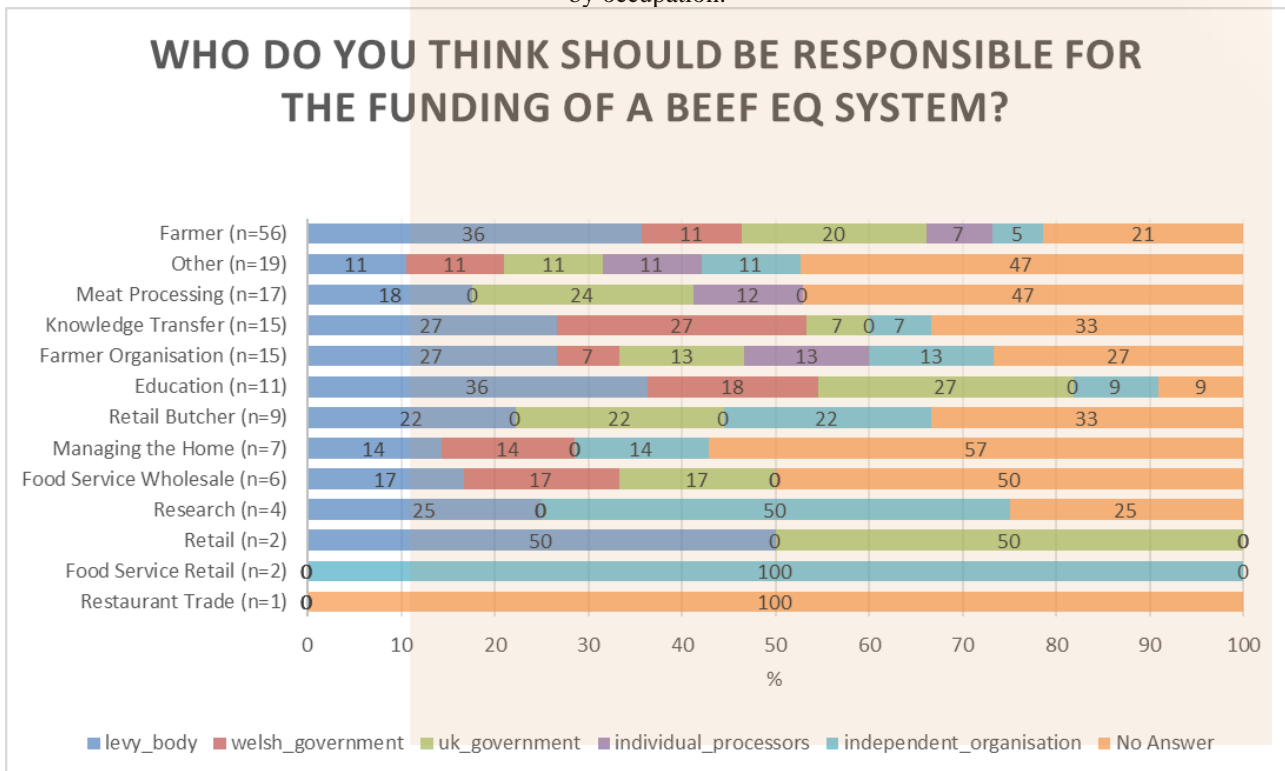


Figure 15: Respondent opinion on how they would like to see a beef EQ assessment and reward system administration funded, by occupation.



3.13. Barriers and benefits of a beef EQ assessment and reward system.

Participants were asked in an open question “What do you see as the main barriers to implementing a beef eating quality system?”. Using a thematic analysis approach, 5 broad themes were identified. Two themes were dominant, “Fear of Change” and “Supply Chain Barriers”. The “Fear of Change” theme referred to being too used to the EUROP system, shifting mindsets from how beef is currently valued, moving away from a culture of continental breeds and how breed societies might respond. “Supply Chain Barriers” referred to the fairness of the system (where costs and benefits sit), the need for the whole supply chain to cooperate, the interest of retailers in eating quality and the lack of leadership in beef eating quality as an industry objective. “Customer Education”, “Who Pays?” and “Grading System Implementation” were the next equally prominent themes. Consumers were thought to have a lack of understanding about eating quality and a lack of cookery skills which play a vital role in the final eating quality experience of consumers. There was general concern around who will pay for the development and implementation of an eating quality based valuation system. “Grading System Implementation” included concerns around balancing eating quality with yield, how eating quality is defined, perceived difficulties with implementing and managing eating quality assessment consistently across the UK and finally how producers can make the link between a live animal and its predicted eating quality given EQ assessment takes place post slaughter. Similar concerns around feasibility and practical implementation and who pays for such a system were identified through consumer focus groups in four European countries including the UK (Verbeke *et al.*, 2010).

Likewise, participants were asked in another open question “What do you see as the main benefits of implementing a beef eating quality system?”. Thematic

analysis of the responses resulted in 3 dominant themes, “Improved Beef Quality”, “Increased Value of Beef”, “Improved Efficiency” and a minor theme of “Production System Quality”. “Improved Beef Quality” was the most dominant theme and was strongly linked to improved confidence in eating quality. Other aspects of this theme related to improved product quality, and improved evidence base on which to communicate with consumers. The “Increase Value of Beef” theme referred to improved prices for producers, increased sales volumes, potential export markets developing and more even distribution of improved value within the supply chain. Within the “Improved Efficiency” theme, farmers producing animals that meet consumer requirements resulting in less waste and reducing costs of production were both mentioned. With regard to the “System Quality” theme, general improvements in animal welfare and environmental performance were mentioned.

Hocquette *et al.* (2011) conducted a study with industry experts on the perception in France of the Meat Standards Australia protocol for assessing eating quality. As with this survey, the benefits of such a system were clear to industry stakeholders (e.g. scientifically robust, relevant, thoroughly tested) but the challenges of implementing such a system due to the complexity of the beef industry were also apparent. Farmer and Farrell (2018) mentioned similar challenges identified anecdotally in Northern Ireland and Ireland. Some countries however, namely New Zealand and Poland, are making advances in developing eating quality grading systems (Farmer and Farrell, 2018). In consumer focus groups, Verbeke *et al.* (2010), found that such a system would go a long way toward meeting consumers perceived need for tender beef and would provide useful information on quality to consumers when purchasing beef.

IV. CONCLUSIONS

This study highlights some opportunities for the development of a beef eating-quality guarantee system in Wales. An increase in consumers’ satisfaction could induce a higher consumption and a higher added-value of beef and consequently increased industry profitability, as well as improved competitiveness of the Welsh beef industry. Therefore, the results of this survey will be taken forward in the BeefQ project and used in discussions with industry stakeholders to develop beef eating quality assessment and reward system implementation scenarios. These scenarios

can then be used as a basis for discussion in the broader UK beef industry as to the future potential of beef eating quality assessment and reward in the UK. The results of this survey will also be discussed with the International Meat Research 3G Foundation and within the EU-funded project INTAQT (INnovative Tools for Assessment and Authentication of chicken meat, beef and dairy products' QualiTies), recently launched to further support a European grading system based on beef eating quality.

Acknowledgements

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Annex 1: Information about the survey and consent

Title: BeefQ: Beef Eating Quality and Carcase Valuation Survey

Purpose of the study

This survey will provide the BeefQ project with an understanding of the wider beef industry's current perception of beef eating quality and the desire for a shift from current methods of valuing beef to one based on predicted eating quality, how this could be implemented in practice, and the barriers perceived in doing so.

The BeefQ - Beef Eating Quality project is funded by the European Agricultural Fund for Rural Development to develop and test a beef eating quality prediction system for Wales. A key aspect of the project is to consult with industry to gauge the desire for, and develop recommendations for, a pathway to implementation for such a system. The results of this survey will contribute to that proposal.

How you can help

By completing the online survey.

If you wish to participate and are happy for us to contact you for additional information, should we require it, please ensure you leave your contact email address at the end of the survey.

The survey

comprises approximately 15 questions

requires you to answer ALL questions presented to you, as accurately as possible

should take a maximum of 10 minutes to complete

Your consent

If you are willing to participate in this study please read the following information prior to starting the survey.

By completing and submitting the survey you agree that all information provided by you and collected by the researchers:

will be used only for this research study

will be accessed only by authorised research colleagues

may be used in a report for publication

may be presented at research conferences or meetings

will be anonymised and treated confidentially in all outputs and/or reporting

We will never use any data provided by you for marketing purposes nor will we pass your data or personal details to any third party

Furthermore, we agree that you have a right to:

request to see a copy/summary of the completed study

request to see any information provided by you which is recorded and retained during the process of data collection

withdraw your permission for us to use your survey data at any time after submission

Privacy Policy and Data Protection

Aberystwyth University is a Registered Data Controller as defined by the Data Protection Act 1998. Any personal details collected through this web site and provided by you will be processed in accordance with the Act, and will only be used for the purpose or purposes stated on the relevant page.

If you have any queries regarding this study please speak to the researcher directly or contact them via email or phone using the contact information provided above. Researcher: Pip Nicholas-Davies (pkn@aber.ac.uk), 01970 622240

Thank you

BeefQ – Survey on Valuing Beef Eating Quality. Your Consent

I agree to participate in the BeefQ research study. I understand the purpose and nature of this study and I am participating voluntarily. I understand that I can withdraw from the study at any time. OK

I grant permission for the data generated from this survey to be used in the research team's publications on this topic. OK

I confirm that I will NOT complete this survey more than ONCE. OK

About You

Q1a. Please select your age range

18 – 24

25 -34

35 -44

45 -54

55 -64

65 +

I prefer not to say

Q1b. Please select your gender

Male

Female

I prefer not to say

Your Location

Q2. What is your location?

- Wales
- England
- Scotland
- Ireland
- Other (please specify)

Please specify your location (country):

Your Occupation

Q3. What is your main occupation?

- Farmer
- Livestock Trade
- Meat Processing
- Retail Butcher
- Retail (Other)
- Food Service (Retail)
- Food Service (Wholesale)
- Restaurant Trade
- Education
- Knowledge Transfer
- Research
- Farming Organisation
- Managing the Home
- Other (please specify):

Farmer (please select all that apply):

- Beef
- Dairy
- Sheep
- Other (please specify):

Farmer (other please specify):

Education (please select one):

- Further Education
- Higher Education

Other (please specify):

Beef Eating Quality (Part I)

Q4a. As a consumer what do you believe to be the good points about beef as a food type and source of dietary protein?

Please comment only on GOOD points

Q4b. As a consumer what do you believe to be the bad points about beef as a food type and source of dietary protein?

Please comment only on BAD points

Q5. Please rank the following in order of importance to you as a consumer when purchasing beef

Please rank where 1st is your most important and 8th is your least important. Ensure you place a unique ranking against each criterion.

- Value for money
- Provenance / locally sourced
- Nutritional content
- Environmental concerns
- Sustainability produced
- Eating quality
- Beef breed
- Animal welfare

Q6. Do you think consumers are confident in the eating quality of Welsh beef?

- Yes
- No

Q7. Do you think the beef industry needs to evolve from the current EUROP grading system?

What is the EUROP grading system? The main beef grading system in use in the UK and Europe is the EUROP system. Grading is done at the end of the slaughter line just before chilling. The EUROP system evaluates carcass conformation and

fat cover. The aim of the EUROP system is to describe carcasses for those involved in slaughtering, cutting, distribution and retailing according to terms relevant to trading. The EUROP system is a good indicator of yield.

- Yes
- No

Beef Eating Quality (Part II)

Q8. Do you think the beef industry needs to measure beef eating quality and reward accordingly?

- Yes
- No

Q8a. What reward system would you like to see for beef producers in the future?

Beef Eating Quality (Part III)

Q9. How would you like to see a beef eating quality assessment and reward system work?

- Replace the current EUROP system
- An extension of the current EUROP system
- Other (please specify)

Please provide more information:

Q10. How would you like to see an eating quality assessment and reward system delivered?

- Processor led
- Retailer led
- Wales national
- UK wide
- Other (please specify)

Please provide more information:

Q11. Who do you think should be responsible for administering a beef eating system?

- Individual processors
- Welsh Government
- UK Government
- Levy Body
- Independent organisation

Q12. Who do you think should be responsible for funding the administration of a beef eating system?

- Individual processors
- Welsh Government
- UK Government
- Levy Body
- Independent organisation

Q13. What do you see as the main barriers to implementing a beef eating quality system?

When answering this question please think about the supply chain AND the consumers.

Q14. What do you see as the main benefits of implementing a beef eating quality system?

When answering this question please think about the supply chain AND the consumers.

Comments

Q15. Would you like to add any further comments?

Thank You, Contact Details (optional) and Exit

Would you like to be contacted in the future about the BeefQ project?

- Yes please
- No thank you

I would like to:

- Receive the results from this survey
- Subscribe to the BeefQ e-Newsletter

Please enter your name:

Please provide your email address: