

Consumer perceptions of branded beef products using focus group research

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Abstract

Meat Standards Australia represents a new beef grading system, derived from consumer preferences and choice criteria rather than product characteristics (Polkinghorne et al. 2006). There is now a much better industry understanding of the links between cattle characteristics, beef cuts and consumer eating quality preferences. Beef can now be classified in ways that matter to consumers. This creates the basis for meaningful product differentiation and branding (Dahl & Hammond 1977 & Trott 1998).

Currently, branding of beef cuts occurs on a limited scale in several small niche markets. In-house research has revealed clear segmentation across consumers and premiums for preferred products in these markets. The objective of this particular study is to use focus groups of beef consumers shopping in these niche markets and at supermarkets and other outlets in nearby shopping centres to identify the characteristics of these consumer segments and their motivations for purchasing a branded product.

The overall objective of the project is to identify the potential for large-scale differentiation and branding in the Australian beef marketing system and how this may best be done given the structure of the supply chain.

Quality Differentiations in Fresh Products

Quality improvements and innovations have been an important challenge in the agri-food sector for a long time. Efforts to standardise agri-food products in quality dimensions through classification schemes, grades and standards have been oriented to giving more information to consumers and creating price premiums for companies that offer higher quality products. In this way, firms can increase their returns by better meeting consumers' preferences and offering quality-guaranteed products (Dahl & Hammond 1977:202-210).

A classification system segregates products in relation to one or more quality attributes or dimensions. The differences generate products more valuable than others in specific uses or to different consumers (Dahl & Hammond 1977:203). These can be formalised in a grading system; using this, the demand of different qualities is expressed and related to the supply of each quality. As a consequence, an outward shift in the aggregate retail demand for the product is expected as well as a corresponding outward shift in the derived demand (farm-level demand) (Dahl & Hammond 1977:210-211).

Australian Meat Marketing and Quality Grading System

The Australian beef industry has evolved in its processing and quality evaluation systems. Different techniques are currently used for evaluating parameters such as tenderness, juiciness and flavour of the meat and guaranteeing the quality of each cut sold into the market (Perry 2008). In this way, the quality of beef commercialised has improved through a more integrated supply chain and the introduction of MSA grades (Polkinghorne et al. 2006).

Consumers can buy meat in Australia mainly in butchers and supermarkets. Until the 1980s butcher shops were the most important segment of meat retailing, however, supermarkets are now the most important retailer. Supermarkets and grocery stores have been increasing their participation in food retail sales. In 2002, the two largest supermarket chains, Woolworths and Coles, shared 76 per cent of food retail sales. Retail food sector concentration has resulted in an increase in information about some

consumers' requirements flowing to producers, allowing them to improve the characteristics of production in pursuit of a price premium. On the other hand, farmers have been able to sign contracts, giving them price stability and more stable cash flow (Jacenko & Gunasekera 2005).

Quality differentiation in fresh meat retailing is rare in supermarkets. The capacity for consumers to express their preferences is severely constrained as a result and the profitability of the entire supply chain is thus muted. The commercialisation of beef mainly involves a 'commodity – raw material' approach without differentiation. This situation is far from the behaviour of best value supply chains, which are at the same time focused on cost, quality, speed and flexibility, because they are agile, adaptable and aligned (Ketchen & Hult 2007).

Overall then, the major constraints in the current beef marketing system appear to be: a) a lack of choice enabling customers to express their quality preferences; b) a lack of price incentives for improving the quality of beef (in branding and differentiation); and c) the presumption that customers are not willing to pay premiums for a better quality. These constraints are operational problems affecting the beef market related to imperfect and asymmetric information, an important type of market failure characterised by the lack of signalling instruments in the market which ensure credible information about product quality (Jahn *et al.* 2005; Latvala & Kola 2003, both cited in Lüth & Spiller 2005).

The Meat Standard Australia (MSA) system offers an opportunity to overcome some of these constraints. MSA is a voluntary beef grading system which has increased information on beef quality because it allows identification of the origin, characteristics and quality of each cut sold into the market. MSA is an eating quality evaluation system based on scientific methods to indicate the eating quality of a specific cut (Cox *et al.* 2007). Beef quality naturally varies between different carcasses causing cut and price to be unreliable indicators of quality or value for consumers. This happens because cuts react differently to production inputs (such as breed type, weaning and hormonal growth promotants (HGP), ossification, marbling, and carcass weight), processing conditions (including hanging, pH and temperature) and value-adding inputs (such as ageing and cooking method).

The MSA grading model enables the estimation of the quality of each cut in relation to an MQ4 score. The MQ4 scoring system was developed on the basis of research showing how consumers relate quality to tenderness, juiciness, flavour and overall satisfaction (Polkinghorne *et al.* 2006). MSA identifies grades of products and a description relating grade to cooking context as "unsatisfactory" (no grade), "good everyday" (3 star), "better than everyday" (4 star) and "premium quality" (5 star). The industry does not commercialise cuts below 3 star grade MQ4 (Carriquiry 2004).

The MSA price premium on a complete retail carcass has been calculated as \$0.39/kg while specific cuts have shown premiums between \$1.11/kg and \$6.00/kg (Dart *et al.* 2007). Beyond this, the highest-value MSA-graded cuts can achieve premiums of \$15/kg when they are branded and commercialised as guaranteed cooked-result products (Carriquiry 2004 and Polkinghorne *et al.* 2006).

The main objective of MSA is to supply uniform and guaranteed eating-quality beef for any cut sold, creating a large quantity of new products of unconventional appearance. Another important issue is how to sell each cut for its most appropriate use (that which reaches the highest MQ4 score for the cut) as a way to maximise the retail value. Now consumers have more information about the quality of the product they are buying, but it is necessary to include information about traceability, achieve quality homogenisation and offer better presentation of products to meet a range of preferences.

Branded Beef Products

Even though the quality consistency of each cut may be guaranteed, when consumers want to buy a piece of meat they do not have much information about its characteristics, so their purchase could be far from their preferences. This issue has

been raised by consumers and some producers, requesting a way to solve this problem (Moeller 1997:1 and Polkinghorne 2007:2).

Meat bought by consumers contains a group of attributes provided by the producer (such as taste, tenderness and colour) and by the processor and retailer (such as packaging, further processing, convenience and advertising) (Hayes et al. 1998). An important type of market failure is imperfect and asymmetric information, which creates operational problems, especially in food markets. In this sense, Akerlof (1970 cited in Lüth & Spiller 2005) said 'poor quality products will prevail over high quality products if there are no signalling instruments in the market which ensure credible information', because high quality products will not receive a price premium. In this context, brands can operate as quality assurance, customer relationship and signalling tools for guaranteeing high and consistent quality standards (Lüth & Spiller 2005).

Branding becomes pertinent for the beef industry as a mechanism by which information about quality is provided to customers and as a guide to the standards that the whole value chain needs to follow (Lüth & Spiller 2005). In this context, the actual challenge is to develop new branded products which increase the information about the characteristics and quality of the product for the customer such that they will be willing to pay an extra price and, in this way, increase the profit for the companies involved in the Australian beef marketing system (Polkinghorne et al. 2006).

Branding and differentiation in the beef market represent a new alternative for improving the effectiveness of the beef marketing system in meeting consumer preferences with the resources available, including investments for the implementation of MSA-related enhancements to abattoir facilities such as processing and packaging, chilled storage, data capture devices and software. Branded products can efficiently make use of these prior investments. In this way, the sector will be able to offer a higher quality product based on more information about traceability (based on MSA files), nutritional attributes, cooking suggestions and better presentation.

Branding is the first necessary step in product differentiation: specific identification of a product as different from other products from unidentified sources. Recent research into fresh food brand premiums suggests that branded products, generally, have a higher price because customers expect they have advantages in three areas:

1. **Quality:** Consumer learning (testing the product in stores or using demonstrations) and durability affect the quality gain in a branded product.
2. **Design:** More attractive appearance and better performance are associated with branded products.
3. **Prestige:** The buyer's self-image is increased by branded products (Jin et al. 2007).

Product quality assessment requires time and skills and can, in the case of hidden characteristics (experience and credence attributes), be difficult or impossible to undertake. Brands solve this problem to the extent that they are found to be reliable indicators of the presence of search and experience attributes, or are trusted to provide credence attributes. In this case, customers with higher income will be willing to pay a bigger premium for branded products because they have a higher opportunity cost of testing products. Other socio-demographic factors, such as education, age, race, gender and household size, also influence the willingness to pay for brands (Jin et al. 2007).

The red meat industry in Australia, as in many countries, has not developed many brands as quality signals, because consumers have not been willing to pay for a better quality they cannot recognise and the efforts for improving this situation have been scarce. For this reason, most of the meat sold is unbranded, has private labels with small promotion budgets, and quality assurance programs oriented more to meeting producers' requirements than consumers' expectations (Alvensleben 1997 cited in Lüth & Spiller 2005).

Domestically, the major retailers have a home brand for generic products. If their minimal presentation of quality-differentiated beef is a valid reflection of the low sensitivity of most consumers to the experienced variety in beef quality, the prospects

may be not profitable for investment in large-scale branding of beef for much larger market segments than those being served by small differentiated companies. The size of quality beef consumers' segments, their preferences and related price elasticity of each group is central to implement beef branding and differentiation on a large scale.

However, brand strategy is becoming more important for the very large Australian beef companies such as Australian Agricultural Company (AACo), The Northern Australian Pastoral Company (NAPCo), Heytesbury Beef, Sidney Kidman and Company, and Twynam Agricultural Group. These companies state they are focused on strengthening their company brand through guaranteeing the quality of their production in relation to sustainable natural resource management, safe products and approved quality standards. For example, AACo is developing new brands related to special breeds with different characteristics, such as 1824 Premium Beef and AACo Wagyu Beef, composed by Darling Downs Wagyu, Kobe Cuisine and Master Kobe. At the moment, it is not possible to buy these products at supermarkets or retail stores; however this demonstrates that brand strategy is being considered as a way to increase the competitiveness of the large beef companies (AACo 2007; Heytesbury 2007; NAPCo 2007; S. Kidman 2008 and Twynam 2007).

Some traditional outlets have survived, but they share a small part of the market with needs not met by larger retailers. Some consumer segments are not satisfied with the larger retailers' offer, allowing small stores, such as Polkinghorne's and Coorong Angus Beef, to differentiate their offer through specialisation and personal service (Jacenko & Gunasekera 2005; Polkinghorne's 2007 and Coorong Angus Beef 2008).

Smaller companies can identify more easily their customers' preferences and organise the complete production for meeting the standards required. This, in addition to differentiation and branding, has allowed such firms to achieve significant price premiums. For example, in Polkinghorne's company, a group of new products have recently been developed, trademarked and promoted as a way to differentiate their offer from competitors. These products include fully cooked prepared dishes, meals based on mince, cubes, stir fry and thin slices of beef. Trademarks like Rodz® (25 mm strips for grilling), Shumi® (4mm thin sliced beef of specific quality) and Wok Stir® (stir fry strips) have appeared in the market. An image developed close to core values of an ethical and environmentally sustainable supply chain was branded with a guaranteed quality. In this way, customers have changed their perception about the store's offer from raw material to guaranteed cooked result and the company receives a significant premium for this innovation (Polkinghorne et al. 2006). Table 1 summarises the choices that customers face at buying beef in Australia.

The challenge for the red meat industry in Australia is whether it is feasible and profitable to develop a wider range of brands on a larger scale which customers in the future could recognise and associate with different attributes, uses and origins.

Table 1: Beef offerings in Australia (Adapted from AACo 2007, Heytesbury 2007, NAPCo 2007, S. Kidman 2008, Twynam 2007 and Polkinghorne 2007)

Characteristic	Supermarkets	Large Companies	Small Companies
Low Prices	X	-	-
Differentiated products by origin	X	X	X
Safe products	X	X	X
Products from sustainable natural resource management	-	X	X
Approved quality standards	-	X	X
Consistent high quality	-	-	X
Easy to prepare products	-	-	X
Branded cuts with guaranteed cooked results*	-	-	X

* = if cooked as recommended.

Consumers Behaviour

Understanding consumers' expectations and their behaviour has been the focus of a large range of studies in the marketing field. Questions such as what, when and why consumers want to buy have been studied and modelled both individually and in groups (Wikipedia 2008). For Kotler (2000:183), the stimulus-response model is the first step for understanding the behaviour of consumers. This model includes marketing and environmental stimuli, buyer characteristics, decision process and decisions. Figure 1 shows the stimulus-response model and its components.

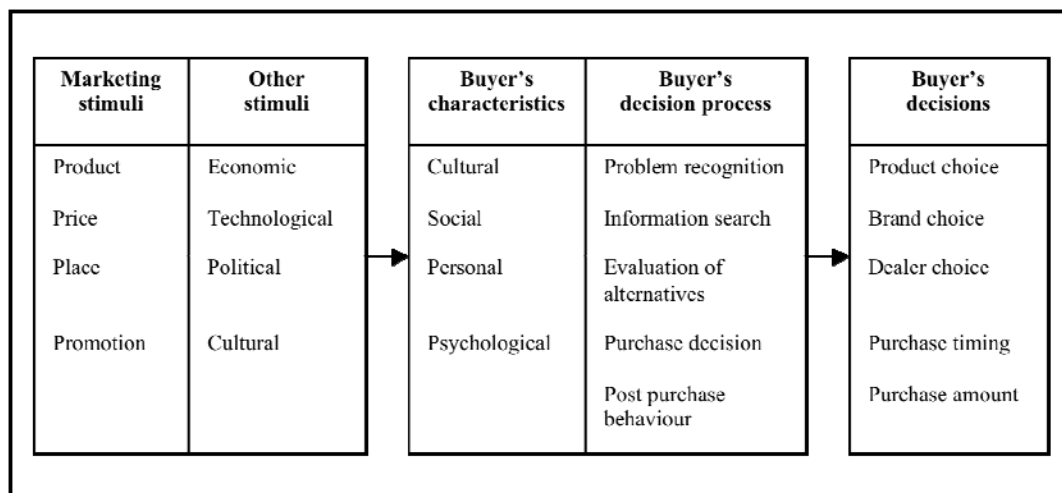


Figure 1: Model of Consumer Behaviour (Kotler 2000:184)

Demographics, psychographics and behavioural variables can influence the buyer's behaviour (Wikipedia 2008). It is important to note the buyer's decision process is composed by five stages, so in some cases the buying process could start a long time before the purchase moment (Kotler 2000:204).

Research Methodology

New product development analysis generally starts with qualitative research, a type of research focused on results not subject to quantification and based on what people do and say. Quantitative research is employed to identify statistically significant differences between users and qualitative research to analyse the attitudes, feelings,

impressions and motivations of different persons
(McDaniel & Gates 2007:127-128; Burns & Bush 1999:230 and Bellenger et al. 1976:2).

Choosing the type of research more suitable for the study depends, among other factors, on the result expected. Qualitative research is useful for giving results relevant to a development process. On the other hand, quantitative research is more useful for describing the market in a moment (Greenbaum 1998:25-26). Table 2 presents the relevant reasons for choosing a particular type of research.

Table 2: Considerations for choosing a type of research (Greenbaum 1998:28)

Qualitative Research	Quantitative Research
<p>Qualitative research is desirable when:</p> <ul style="list-style-type: none"> • Modifications need to be made in an idea before it is finalized. • Very fast consumer input is needed. • The research budget is limited. • Client observation of the research is necessary. • There is a need to probe deeply into the causes of some observed behaviour. 	<p>Quantitative research is desirable when:</p> <ul style="list-style-type: none"> • A picture of the market at a given point in time is needed. • Data that can be projected to a larger universe are needed. • The target participants for the research are geographically dispersed or difficult to reach. • Large amount of specific information from participants is sought. • The data must be statistically representative of a very large geographic area.

Qualitative and quantitative approaches are not exclusionary and could be used together for exploring and understanding attitudes and behaviours and what are the differences between them (Wilson 2006:105). This type of study that combines both research methods is called pluralistic research. This generally starts with exploratory qualitative techniques that help to understand the research problem and show the important factors to the researcher. With this information, the design and execution of the quantitative phase has a greater chance of being successful (Burns & Bush 1999:231-232). For Wilson (2006:105) 'a study that combines qualitative and quantitative methods gives you depth of understanding as well as information about the general representativeness of that understanding'.

This research is intended to be a pluralistic study composed first by a focus group stage which will identify the variables to analyse and will give to the researchers some ideas about consumers' perceptions. After that, the research will apply econometric analysis to survey data for testing the focus group's ideas and quantify the relationship between consumers' characteristics and beef attributes (including brands) based on product choices (Umberger 2008).

Focus Group Research

Focus group is a technique of qualitative research that is useful for analysing ideas, feelings, attitudes, perceptions and experiences about a particular issue in a small group of people, information difficult to collect with other, more structured methods of data collection. This method requires the guide of an experienced moderator who focuses the discussion in relevant issues for the research (Burns & Bush 1999:237). This method is preferred by many researchers to individual in-depth interviews, because they believe a person would be more able to talk about an issue if he or she is in a group with other persons with similar problems (Bellenger et al. 1976:7).

Focus groups are applied for: a) Generating ideas; b) Understanding consumer vocabulary; c) Revealing consumer needs, motivations, habits, perceptions and attitudes; and d) Understanding findings from quantitative studies (Burns & Bush 1999:238-239). Focus groups generate fresh ideas, allow clients to observe the discussion, are versatile and work with specific groups. However, they are not representative of the population, they are subjective and they have higher costs per person interviewed (Burns & Bush 1999:246-248).

Focus groups will be used in this research as an early part of the analysis method to assess the profitability of beef branding and differentiation. Through this technique it will be possible to know relevant customer perceptions, judgement process and choice

making. Eventually, it should be possible to identify different groups of consumers, their characteristics, purchasing habits and their attitudes to branded beef.

One case study will be Polkinghorne's, which has three shops and supplies other retail stores in Melbourne. Polkinghorne's is a vertically integrated company oriented to sell high quality fresh meat products and home-style cooked meals in a new and contemporary retailing format. The company carries out the complete process of bringing a meal from the farm into the store and has high quality standards at every production stage (Polkinghorne's 2007).

Polkinghorne's represents an interesting case for study, because the company has oriented the entire chain to satisfy customers' preferences not met by larger retailers' offers. The firm is offering convenience, consistent high quality and easy to prepare products, combined with branding attributes relating to the origin of the food and the production process involved. In this way, the company has reinvented the traditional butcher shop into a branded, fresh meals store. Through this strategy, Polkinghorne's is receiving a price premium for its products (Polkinghorne's 2007).

Polkinghorne's offer is strongly differentiated from the offer from the traditional butchers and the supermarkets who are trying to share the part of the market willing to pay an extra value for quality. Polkinghorne's is attempting to transmit this concept to consumers through very attractive and organised stores, products presentation and information displayed at the entrance of the stores for catching the attention of consumers.

The areas of Clarendon Shopping Centre and Albert Park in Melbourne are influenced by the offer of the butcher shops in the South Melbourne Market, where the conditions are close to those of perfect competition. After analysing the prices paid at these outlets, it can be inferred that consumers who want a cheaper product go to the supermarket, but others more interested in higher quality products go to a specialised butcher shops.

Coles supermarket in the Clarendon Shopping Centre offers organic beef and beef from King Island, differentiation being based on the conditions of production. This fact shows in that area there are customers willing to pay an extra price for a high quality product, but the prices are considerably lower than the organic butcher shop and Polkinghorne's stores. This fact could be related to the low differentiation degree between types of beef at the supermarket, where only a sticker differentiate between cuts, but does not give extra information to customers and does not guarantee a higher eating quality of the cut of beef.

The objectives of the focus group are to identify:

- The reasons why customers prefer to buy meat in Polkinghorne's store or in supermarkets or other butcher shops.
- The willingness to pay a price premium for a branded product.
- The characteristics and estimated size of different groups of customers.

For answering these points, the research will focus the analysis in understanding the beef purchase process, detecting the main characteristics for doing segmentation and identifying consumers' perceptions about branded beef and current brands.

The methodology includes analysing three groups of eight customers with different characteristics. During the sessions, the moderator will talk about the importance of this activity for the beef industry; will collect personal data about customers; will discuss their preferences for buying beef and premiums for branding products as an equal to high quality – value added products; and will give some product samples or other gifts to customers interviewed.

The characteristics of the focus group analysis to be used in this research are:

1. Three focus groups will be applied to interview separately consumers that usually:
 - a) Prefer to buy branded meat in specialised stores (as Polkinghorne's Pty. Ltd.).

- b) Prefer to buy meat in butcher stores.
 - c) Prefer to buy meat at supermarkets.
2. An expected quantity of eight customers will be interviewed in each focus group; they will be selected by their characteristics and average meat consumption (more than twice a week).
 3. The focus groups will be carried out by a consultant group located in Melbourne, which has experience using this technique and analysing food markets.
 4. The interviews will be conducted in a specialist consumer research facility with full technological support where it is expected the conditions will lead to more open and frank responses.
 5. The discussions will follow different questioning routes for each group. The discussion process will be divided in the following five parts suggested by Krueger (1994:54-55).
 - a) Opening questions
 - b) Introductory questions
 - c) Transition questions
 - d) Key questions
 - e) Ending questions
 6. The analysis method will be a Taped-Based Analysis (Krueger 1994:157). The characteristics of this method include:
 - a) Gather tapes and field notes by category
 - b) Review field notes by category
 - c) Enter abridged transcript on computer
 - d) Look for emerging themes (by question and then overall)
 - e) Develop coding categories and code the data
 - f) Sort the data into coding categories
 - g) Construct topologies or diagram the analysis
 - h) See what data are left out and consider revision
 - i) Prepare the draft report – begin with most important questions

The second case study will focus on another successful Australian vertically integrated meat company in South Australia. This business owns a commercial beef herd, feedlot, boning and distribution facility and several branded retail outlets. It uses brand names related to the specific region from which their product originates or the breed of animal the meat came from. The business has formed close strategic alliances with a processor and several restaurants and premium meat retailers. In addition to selling through their privately owned high-end retail outlets, their branded beef products are sold through several fine restaurants and retail outlets. This is rather innovative as they base their product decisions on both market and product research, and have a database of customers from their retail stores. This second case will address the same research objectives identified for the Polkinghorne case study. Similar methods will also be used: focus groups with end-consumers as well as interviews with retail and restaurant customers.

The Victorian focus groups are scheduled to be held on September 10 2008. The results of these groups are expected to be analysed and presented at the AARES conference to be held in February 2009 (Morales et al. 2009). The South Australian focus groups are expected to be scheduled for early 2009.

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