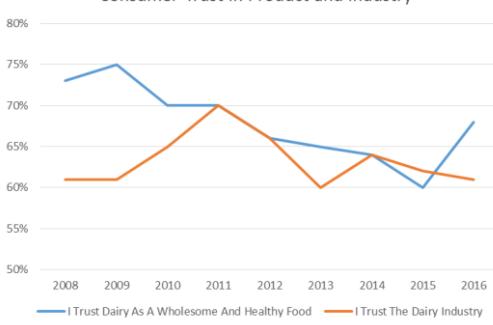
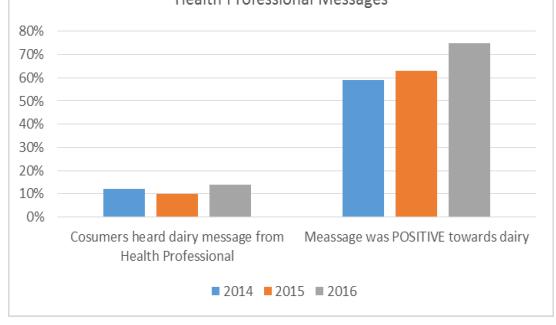


## SP3 – Trusted Dairy Industry

Industry & Community Marketing																																													
Overview																																													
<b>Market Need / Context</b>			<ul style="list-style-type: none"> <li>The general public is slowly losing trust and confidence in the dairy industry. They have doubts or concerns about dairy foods being an essential part of a daily diet, and many are either reducing their consumption or have enough concern to consider doing so.</li> <li>There are also concerns about the transparency of the industry and the difficulty in coping with conflicting information to make informed choices. Furthermore, the industry's social licence to operate is at risk on a number of fronts namely health and nutrition, animal welfare and to a lesser degree environment/sustainability and new technologies.</li> <li>The Industry and Community marketing program is required to address industry trust using a multi-faceted engagement and communications strategy in order to maintain the industry social licence and in-turn enhance industry sustainability. Industry promotion is unlikely to increase consumption, but proactive promotion of consistent industry messaging in conjunction with active issues management will contribute to maintaining a positive reputation and public perception over the long term.</li> <li>The connection between dairy farmers and consumers in today's environment is considerably less than it was 20 years ago. The community has little understanding of farming practices and contribution to the community. Developing a grass roots dairy voice with a consistent message will help address this.</li> <li>Farmers continue to be overwhelmed with information from multiple sources leading to a lack of awareness and adoption of DA's programs and services. Segmentation of farmers is required to enable development of relevant programs and targeted communications and engagement.</li> </ul>																																										
<b>Industry Indicators</b>			<p>Consumer Trust in Product and Industry</p>  <table border="1"> <caption>Data for Consumer Trust in Product and Industry</caption> <thead> <tr> <th>Year</th> <th>I Trust Dairy As A Wholesome And Healthy Food (%)</th> <th>I Trust The Dairy Industry (%)</th> </tr> </thead> <tbody> <tr><td>2008</td><td>73</td><td>61</td></tr> <tr><td>2009</td><td>75</td><td>61</td></tr> <tr><td>2010</td><td>70</td><td>64</td></tr> <tr><td>2011</td><td>70</td><td>70</td></tr> <tr><td>2012</td><td>68</td><td>65</td></tr> <tr><td>2013</td><td>66</td><td>60</td></tr> <tr><td>2014</td><td>64</td><td>63</td></tr> <tr><td>2015</td><td>60</td><td>62</td></tr> <tr><td>2016</td><td>68</td><td>61</td></tr> </tbody> </table> <p>Health Professional Messages</p>  <table border="1"> <caption>Data for Health Professional Messages</caption> <thead> <tr> <th>Category</th> <th>2014 (%)</th> <th>2015 (%)</th> <th>2016 (%)</th> </tr> </thead> <tbody> <tr><td>Consumers heard dairy message from Health Professional</td><td>10</td><td>10</td><td>10</td></tr> <tr><td>Message was POSITIVE towards dairy</td><td>58</td><td>60</td><td>72</td></tr> </tbody> </table>	Year	I Trust Dairy As A Wholesome And Healthy Food (%)	I Trust The Dairy Industry (%)	2008	73	61	2009	75	61	2010	70	64	2011	70	70	2012	68	65	2013	66	60	2014	64	63	2015	60	62	2016	68	61	Category	2014 (%)	2015 (%)	2016 (%)	Consumers heard dairy message from Health Professional	10	10	10	Message was POSITIVE towards dairy	58	60	72
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<b>Aim</b>			Build trust and confidence in dairy and the industry																																										
<b>Objectives</b>			<ul style="list-style-type: none"> <li>Support the industry's licence to operate through communication and promotion of the product and industry.</li> <li>Improve stakeholder awareness of Dairy Australia's programs and services through more effective communication and engagement.</li> </ul>																																										
<b>General Approach / Strategy</b>			<p><b>Consumer Marketing &amp; Communications Approach</b></p> <ul style="list-style-type: none"> <li>In recent years Dairy Australia has segmented consumer marketing projects by life stage with a focus on women, particularly Balanced mums (mothers of kids between 5-12 years who have a balanced view of food and nutrition) and their influencers (e.g. teachers, health professionals). We need to review and determine relevance in relation to building trust and determine relevant channels, messaging and influencers of each segment to inform a new communications strategy.</li> <li>In 2013 the Legendairy brand platform and subsequent marketing and promotional plan was put in place to tell the unique story of the Australian Dairy Industry to inspire confidence in dairy people, build trust with consumers, and win respect from those who influence the operating environment. In conjunction with the consumer audience assessment, DA will undertake a review of the Legendairy, Dairy Australia and sub brand architecture and guidelines, to ensure the brand platform and messages are relevant, effective, consistent and transparent.</li> <li>A consistent and overarching communications approach will be developed in line with the three pillars of the Sustainability Framework – Enhancing Livelihoods, Improving Well-being and Reducing Environmental Impact. The communications needs to address and invite engagement on contentious issues and areas of public concern including fat and sugar levels in milk and dairy foods, care of livestock on farms and use of additives and the perceived 'naturalness' of dairy products.</li> <li>Influencer partnerships will also be reviewed to enhance level of credibility</li> <li>The consumer, key influencers and farmers are not seen as independent, but highly interlinked. Where relevant, messages and activities will be coordinated and leveraged across the projects to ensure maximum impact.</li> </ul> <p><b>Farmer Communications and Engagement</b></p> <ul style="list-style-type: none"> <li>Dairy Australia will undertake stakeholder market segmentation with the aim to enhance the value and uptake of Dairy Australia's programs and services, by better aligning farmer needs with program delivery and more targeted communications and engagement.</li> <li>The Dairy Australia brand, program logos and branding guidelines, will be reviewed to ensure our presence is maximised and attribution of our programs and services is clearly linked back to DA.</li> </ul>																																										
Program Detail																																													
Project No. / Title	Project Level Objectives	Focus	2017/18 Changes																																										
P247 Brand Management*	Ensure communications and branding effectiveness and consistency across all programs	<ul style="list-style-type: none"> <li>Establish a strategic communications framework that can be delivered via integrated projects targeting key consumer and influencer audiences</li> <li>Undertake a Consumer Segmentation Study to understand and develop clear and relevant segments based on industry and</li> </ul>	<ul style="list-style-type: none"> <li>Holistic oversight of branding across M&amp;C beyond Legendairy</li> <li>Establishing a more specific approach to addressing the social license to operate</li> </ul>																																										

## Industry & Community Marketing

		<p>product trust. This will inform development of a strategy to address or influence public trust efficiently.</p> <ul style="list-style-type: none"> <li>Review DA corporate and consumer brand platforms and align to new communications strategy. Support integration of the above across M&amp;C to drive consistency, efficiencies and effectiveness</li> </ul>	communications in line with the sustainability framework pillars
P263 Consumer Marketing & Communications (Plan due in October)	Maintain consumer trust and confidence in dairy products and the industry Positively shift consumer attitudes and perceptions around the dairy industry and product	<ul style="list-style-type: none"> <li>A revised integrated marketing and communication strategy will be developed and delivered within this project.</li> <li>The strategy will address consumer concerns with transparency and positively shift attitudes towards product and industry using a phased campaign approach.</li> <li>Channels and messaging will be targeted to key audience segments based on their attitudes towards dairy products and the industry.</li> <li>Annual consumer tracking and campaign measurement will be undertaken.</li> </ul>	<ul style="list-style-type: none"> <li>This new project consolidates P220 and P258, and requires scoping and strategy development for launch in February 2018.</li> </ul>
P262 Primary Schools Engagement (New plan due October)	To increase the proportion of teachers that deliver positive dairy messages to students about the dairy industry and its products.	<ul style="list-style-type: none"> <li>Review and refine existing direct schools engagement program tools - Picasso Cows, Student Pen Pal, Healthy Bones Action Week (HBAW).</li> <li>Move delivery of the direct schools engagement programs (Picasso Cows, Student Pen Pal, HBAW) online to maximise cost-efficiencies and extend the reach year-on-year to more Australian schools.</li> <li>Map annual teacher planning processes and identify key barriers on the education calendar to strategically plan schools engagement programs.</li> <li>Develop a partnership strategy to focus on two core program pillars - Farm to Plate and Health and Nutrition, each delivering different targeted messaging.</li> <li>Enhance digital marketing by leveraging targeted Facebook advertising, whilst maintaining the Google AdWords campaign</li> <li>Maintain a multi-channel approach, to connect with teachers across a variety of networks and touchpoints.</li> </ul>	<ul style="list-style-type: none"> <li>Schools engagement will be to digitise the programs, reduce delivery costs and seek better alignment with the education calendar to continue to increase teacher participation.</li> </ul>
P256 Health Professionals Communication and Engagement	To increase the proportion of dairy positive health messages heard by consumers from health professionals	<ul style="list-style-type: none"> <li>Continue to build awareness of dairy's health benefits and address barriers to recommending dairy to key health and nutrition influencers of consumers (dentists, dietitians and GPs).</li> <li>Continue to build relationships with member organisations (Australian Dental Association, Dietitians Connection, RACGP) as key education channels.</li> <li>Deliver content themes (determined by barriers identified in tracking and opportunities identified with KOLs) via owned and paid channels: Foods That Do Good website, online and print advertising, and editorial.</li> <li>Establish collaborative partnerships with relevant organisations and health influencers to increase credibility as a trusted source of nutrition information for health professionals, generate media interest and build reciprocal networks. (e.g. Gut Foundation, Diabetes Victoria)</li> </ul>	<ul style="list-style-type: none"> <li>Review health professional's audience, brand and channels to ensure program aligns to the new consumer segments.</li> </ul>
P223 Food Marketing and Communications	To protect dairy's place in the Australian diet, by promoting the usability, versatility, enjoyment of a wide variety of Australian dairy products.	<ul style="list-style-type: none"> <li>Deliver the 19th annual Australian Grand Dairy Awards with a continued focus on bringing the stories of our Australian producers and high quality product to consumers in a newsworthy and relevant forum. Leverage 2017 learnings to continue to build consumer engagement with the awards and award-winning produce.</li> <li>Review the role of owned channels (Cheese Please and The Dairy Kitchen) against revised segments and strategy.</li> <li>Develop manufacturer engagement strategy to ensure better alignment of marketing and communications across industry</li> </ul>	Increased focus on driving awareness of AGDA across the year
P225 Farmer and Farming Communities Industry Marketing and Communications	To ensure communities recognise the value of dairy farming in their region, in-turn enhancing farmer pride	<ul style="list-style-type: none"> <li>Continue to connect dairy farmers with their regional communities</li> <li>Raise the profile of dairy farmers and their communities through story-telling</li> <li>Continue to raise awareness of a proud and resilient industry through Legendary support and sponsorships</li> <li>Successfully coordinate and manage industry events across the business</li> </ul>	<ul style="list-style-type: none"> <li>Emphasis on engaging and connecting women in dairy</li> <li>Increased focus on raising the awareness of dairy through key agricultural sponsorships</li> <li>Increased focus on regional sporting sponsorships to encompass all dairy regions</li> <li>Project now includes corporate sponsorships and events</li> </ul>

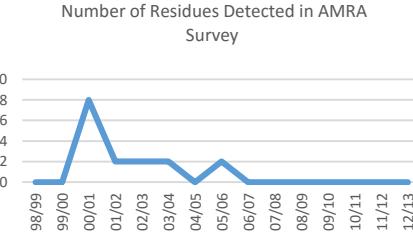
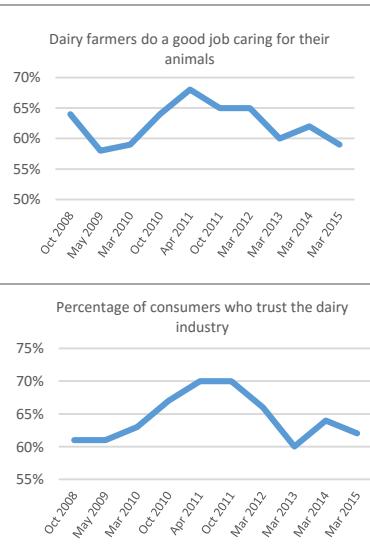
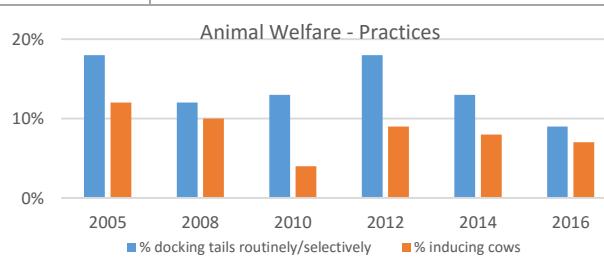
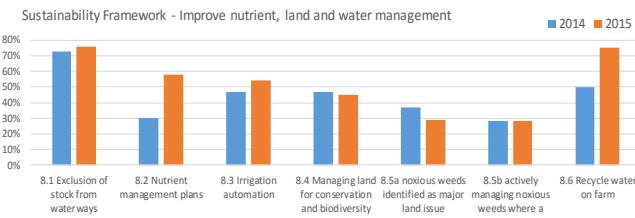
\* P247 change from Legendairy Platform Management to Brand Management

Industry & Community Marketing							
Evaluation & Budget							
Project	Evaluation		Expenditure Planning				
	Planned BCR	Investment Attractive-ness	2015/16 Actual	2016/17 Plan	2017/18 Plan	2018/19 Plan	2019/20 Plan
P220 Marketing and Communications to Mums and Kids		3.4	3,270,707	1,473,911	-	-	-
P258 Marketing and Communications to Women (18-50+)		2.7	-	403,001	-	-	-
P228 Industry Marketing Support		3.4	353,801	-	-	-	-
P263 Consumer Marketing & Communications				-	1,760,000	1,780,000	1,710,000
P262 Primary Schools Engagement				218,591	335,000	50,000	50,000
P247 Legendairy Platform Management		4.2	665,003	-	533,500	400,000	400,000
P223 Food Marketing and Communications		4.2	514,292	397,583	247,000	247,000	247,000
P225 Farmer and Farming Communities Industry Marketing and Communications		3.9	438,933	500,955	495,000	495,000	495,000
P226 Human Health and Wellness Partnerships & Engagement		3.4	449,442	225,608	250,000	250,000	250,000
P256 Health Professionals		4.0	-	440,144	370,000	320,000	320,000
Total		3.6	6,539,748	3,659,793	3,990,500	3,542,000	3,472,000
Notes	<p>* Expenditure to cover school initiative for remainder of 2017 calendar year before project wound down and new consumer marketing and schools project written.</p> <p>** New projects to replace P220 &amp; P256</p> <p>*** Increased due to inclusion of corporate sponsorship</p>						
Key Milestones - see note below*							
Project	Milestone Description				Planned Completion	Status	
P247	Agency appointed to undertake consumer segmentation research and branding review				1 June 2017		
P247	Delivery of segmentation and branding recommendations				31 August 2018		
P263	Revised Project and Initiative Plans (including marketing and comms plan) presented to the board.				October 2017		
P263	Creative and media agency/agencies briefed				Mid November		
P263	Agency agreements finalised and media schedule confirmed				January 2018		
P220	Execute a schools activation to drive participation in Healthy Bones Action Week				August 2017		
P220	Picasso Cows Lite Pilot Program complete				October 2017		
P262	Discover Dairy website upgrade live				April 2018		
P262	Revitalised Picasso Cows and Picasso Cows Makeover programs launched				April 2018		
P223	AGDA PR campaign briefed				August 2017		
P223	AGDA PR campaign delivered				March 2018		
P223	AGDA PR Campaign results reported and recommendations made				April 2018		
P225	(Building Skills and Capabilities) - Australia's LEGENDAIRY Women's Network (ALWN) website launched				September 2017		
P225	(Maintaining Awareness) - 'Meet the Farmer' pilot successfully launched at Royal Adelaide Show				October 2017		
P225	(Telling the Dairy Story) - National 2017 Legendairy Capital announced and community celebration held				December 2017		
P225	(Events & Sponsorships) – New online resource form built and utilized at a minimum of six major Ag events				March 2018		
P256	Deliver Content theme one (e.g. Bone theme)				September 2017		
P256	Deliver content theme two (e.g. Weight Management)				February 2018		
P256	Deliver content theme three				May 2018		
P256	Scope the audiences, branding and use of own versus existing digital channels				November 2017		

Industry & Community Marketing				
Key Performance Indicators (KPIs) - see note below*				
Target Outcome	Measure	Source of data	2017/18 Target	2018/19
P262 To increase the proportion of teachers that deliver positive dairy messages to students about the dairy industry and its products.	Increase usage and engagement with the Discover Dairy website and resources	Google Analytics	> 60,170 downloads >563,518 page views Maintain 3% bounce rate	
	Maintain teacher participation rates in Discover Dairy school programs		Student Pen Pal program – 110 Healthy Games – 130 Picasso Cows & Makeover – 150	
P263 To drive consumer trust in the industry and products <i>Specific drivers of trust and key perceptions will be identified and KPIs set accordingly.</i>	Maintain the proportion of consumers who agree "I trust the dairy industry"	Dairy Monitor Survey 2018	>61%	
	Maintain the proportion of consumers who agree "I trust dairy as a wholesome and healthy food"	Dairy Monitor Survey 2018	≥68%	
P225 To ensure communities recognise the value of dairy farming in their region, leading to improved farmer pride	Increase the number of people in regional communities who agree that "The dairy industry is an essential part of my community"	Dairy Monitor Survey 2018	From 51% to 60%	
	Increase the number of dairy farmers who agree that "People in my regional community appreciate the contribution I make in my community"	NDFS 2018	from 78% to 82%	
	Increase the number of dairy farmers who mostly talk positively to people both inside and outside the dairy industry	NDFS 2018	from 43% to 49%	
	Grow the number of ALWN memberships		Increase by 20% nationally	
P223 Increase trust in Australian dairy through promotion of the industry's people, high quality product and usage.	Increase the percentage of consumers that "Prefer to buy Australian made or locally produced dairy products whether possible"	Dairy Monitor Survey	75%	
	Increase the percentage of consumers that believe "The Australian dairy industry produces healthy and nutritious products"	Dairy Monitor Survey	>69%	
P256 To increase the proportion of dairy positive health messages heard by consumers from health professionals through education and engagement.	To increase the proportion of dairy messages heard by consumers from health professionals	Dairy Monitor Survey	>14%	
	To increase the proportion of positive messages heard by consumers from health professionals	Dairy Monitor Survey	>75%	

## Industry Risk & Reputation Management

### Overview

<b>Market Need / Context</b>	<ul style="list-style-type: none"> <li>A sustainable dairy industry is one that builds and maintains its reputation with consumers and the community.</li> <li>While consumption of dairy products is stable and demand from overseas markets strong, it is of continuing importance to maintain and strengthen how Australian dairy (product and the industry itself) is perceived.</li> <li>Public perceptions of the impact of dairy food consumption on human health and nutrition, and of animal welfare, food safety, environmental stewardship and treatment of labour resources are critical issues that need to be proactively managed to ensure the Australian dairy industry has an ongoing social license to operate.</li> <li>Those that influence the dairy industry's operating environment, whether they be government, regulators, media, academics or NGOs, need to have confidence in, and be assured of, the industry's practices and products.</li> </ul>
<b>Industry Indicators</b>	    
<b>Overall Objective/s</b>	<ul style="list-style-type: none"> <li>Protect industry reputation and support sustainability via proactive management of short and longer term industry risks</li> </ul>
<b>General Approach / Strategy</b>	<ul style="list-style-type: none"> <li>Activities are undertaken on both a planned and as-needed basis, supporting industry requirements for information, analysis and input to government policy review and reform processes.           <ul style="list-style-type: none"> <li><b>Immediate response:</b> Providing a managed response to emerging or escalating issues with the potential to negatively impact industry reputation</li> <li><b>Awareness &amp; Education:</b> Providing information to support a positive understanding of the dairy industry and its products among key societal and policy influencers and decision makers. Relationship management initiatives, including government/stakeholder forums, promotional events, public speaking, etc. Sponsoring organisations that have influence over target audience</li> <li><b>Performance benchmarking:</b> Developing, implementing, reviewing and reporting on the industry's sustainability credentials, including developing metrics that evidence progress towards the industry's targets for long term sustainability. Funding of central bodies that maintain quality standards and monitor industry performance</li> <li><b>Policy Support:</b> Supporting a positive policy and regulatory operating environment: Commissioning expert analysis to review existing and proposed policies, and identify innovative policy solutions. Preparing background briefings and other communication materials to support industry policy positions. Facilitating the adoption of industry policies, strategies and practices that are highly regarded by consumers, regulators and the community.</li> <li><b>Health / Nutrition Research:</b> Ensuring that there is a solid foundation of scientific evidence behind our claims that the consumption of dairy products improves wellbeing and filling in 'evidence gaps' in order to enhance the effectiveness of our communications to policy makers and societal shapers, influencers and consumers</li> </ul> </li> <li>Delivery channels include collaboration with relevant groups, support for industry forums, change practice workshops, information, advocacy groups, and widespread circulation of materials to relevant stakeholders</li> </ul>
<b>Collaboration &amp; Dependencies</b>	<ul style="list-style-type: none"> <li>This program is closely aligned with "Consumer and Community Marketing" as there is significant cross-over in the area of social license and messaging / utilisation of the <b>Legendairy</b> promotional platform. It also works closely with SP1 and SP2 across common license to operate issues.</li> <li>Co-investment with other RDPs and research entities in reviewing the effects, costs and benefits of current and proposed policy levers</li> </ul>

## Industry Risk & Reputation Management

Program Detail			
Project No. / Title	Project Level Objectives	Focus	2017/18 Focus / Changes
P172 Industry Issues Management	Protect industry reputation via effective response to emerging or escalating industry issues	<ul style="list-style-type: none"> <li>Maintain the Risk Register and industry's Issues Management Framework (IMF)</li> <li>Maintaining communications with a network of industry key contacts about the IMF and potential issues</li> <li>Continuous improvement of the framework/networks/skills required to enable an effective response to emerging issues</li> <li>Facilitating an industry response to an issue or crisis in a timely and effective manner</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>
P177 Managing Supply Chain, Food Safety and Integrity Issues	Protect industry reputation through management of food safety and quality issues	<ul style="list-style-type: none"> <li>Assess and address reputation risk issues that stem from changing processor models: more smaller / vertically integrated processors</li> <li>Development of communication tools/materials for providing information about the risk management systems in the dairy supply chain</li> <li>Focus on enhancing milk safety and quality across the supply chain</li> <li>Continued funding of AMRA Survey to monitor the effectiveness of food safety and quality management programs</li> </ul>	<ul style="list-style-type: none"> <li>Funding for the AMRA Survey will now be through the Dairy Export Cost Recovery model through DAWR. DA will continue to work with DAWR on the program</li> <li>The Federally funded Package Assisting Small Exporters (PASE) Dairy Project (Are you Trade Ready) will continue with funding ending 30<sup>th</sup> June 2018 – this project focuses on helping SME Dairy businesses to export</li> </ul>
P153 Dairy Industry's Sustainability Framework / Strategy	To build and develop the Sustainability Framework as a tool to measure, report and improve the Australian dairy industry's sustainably credentials	<ul style="list-style-type: none"> <li>Continued development and roll-out of the Sustainability Framework as the overt tool that measures progress of the industry from a "sustainability" perspective</li> <li>Ensure that priorities identified still meet stakeholder expectations and reflect changes changing community goals: Review the usefulness of current targets and performance measures / Review effectiveness of actions to achieve 2020 targets / Determine post-2020 targets</li> <li>Engage with farmers to support increased adoption of sustainable practices</li> </ul>	<ul style="list-style-type: none"> <li>Will develop an AH&amp;W Self-Assessment program and digital tool for monitoring and measuring implementation of recommended industry AH&amp;W practices</li> <li>2016/17 focus areas continue</li> </ul>
P226 Human Health and Wellness Partnerships & Engagement	Develop and strengthen Dairy Australia's strategic partnerships and engagement, ensuring the industry has a coordinated approach to working towards improving societal trust and respect for the industry.	<ul style="list-style-type: none"> <li>Refocus partnerships to deliver new key messages to consumer and health professional audiences</li> <li>Influencer &amp; industry engagement – maintain presence at key conferences on the issue of lactose intolerance, and weight</li> <li>Increase policy makers and societal shapers awareness of relevant, evidenced based health and nutrition science</li> <li>Maintain a health and nutrition positive policy and regulatory environment for five food group dairy foods; all milk, cheese and yoghurt</li> </ul>	<ul style="list-style-type: none"> <li>Emphasis will be placed on highlighting topics which are barriers for dairy consumption e.g. gut health and weight</li> <li>This project will continue to support the Australian Dietary Guidelines.</li> </ul>
P227 Human Nutrition Research & Science	To protect industry reputation through credible research supporting the nutritional and health impact of dairy product consumption	<ul style="list-style-type: none"> <li>Address key evidence gaps in dairy product nutrition science, to support key industry policy positions and provide the basis for substantiated communications to policy makers, health influencers and consumers. Ongoing research projects are focusing on the following:           <ul style="list-style-type: none"> <li>Bone health ("the Fractures study" – A study into improved health for elderly through increased dairy consumption)</li> <li>Supporting dairy recommendations in future dietary guidelines (in particular the role of dairy foods within a Mediterranean diet)</li> <li>The impact of dairy product consumption on risk of type 2 diabetes</li> <li>The association between intake of sodium and dairy-related nutrients and blood pressure</li> </ul> </li> </ul>	<p>Add:</p> <ul style="list-style-type: none"> <li>The impact of dairy product consumption on risk of type 2 diabetes</li> </ul> <p>Remove:</p> <ul style="list-style-type: none"> <li>Health aspects of full fat dairy product in cardiovascular health</li> </ul>
P233 Policy Support for Improving Animal Health & Welfare	Protect industry reputation and sustainability by managing risks	<ul style="list-style-type: none"> <li>Develop evidence-based policy positions that promote the industry's credibility for good Animal Welfare management and minimising adverse community reactions to reduce compliance and industry burden</li> </ul>	<ul style="list-style-type: none"> <li>No change</li> </ul>

## Industry Risk & Reputation Management

	associated with animal health, biosecurity and animal welfare	<ul style="list-style-type: none"> <li>Enhance biosecurity measures on dairy farms and industry preparedness for emergency animal diseases</li> <li>Continued liaison with key stakeholder groups and opinion leaders to reinforce industry support activities in key policy areas</li> <li>Policy development and Regulatory support: Includes assisting the farms to have practices that comply with National Standards:           <ul style="list-style-type: none"> <li>Banning of tail docking, National Animal Welfare Standard for Cattle will legislate current Code of Practice</li> <li>Management of the phase-out of routine calving Induction</li> <li>Calf management and electronic vendor traceability to ensure calves are treated humanely all along the supply chain.</li> </ul> </li> </ul>	
P259 Technical Policy Support	Protect industry reputation and sustainability by managing risks associated with water, energy, climate change, intensification and land use planning, biotechnology infrastructure, workforce access and market competition	<ul style="list-style-type: none"> <li>Monitoring implementation of Murray Darling Basin Plan and informing advocacy for changes to minimise volume of water removed from irrigated agriculture.</li> <li>Soil and biodiversity – watching brief</li> <li>Energy / Climate change – monitor and assess potential impact of mitigation and adaptation policies at State and National level.</li> <li>Evaluate implications of energy market reforms, including potential for market mechanism to reduce GHG.</li> <li>Inform industry policy in transport, workforce, market access, market competition and other infrastructure areas</li> <li>Evaluate intensification and land use planning policies</li> <li>Ongoing gene technology policy and regulatory support and other infrastructure areas</li> </ul>	<p>Remove</p> <ul style="list-style-type: none"> <li>Inform industry policy on tax reform in agriculture to promote investment in the industry</li> </ul> <p>Add</p> <ul style="list-style-type: none"> <li>Evaluate intensification and land use planning policies</li> <li>Ongoing gene technology policy and regulatory support</li> </ul>
P243 Societal Shapers	To influence key industry stakeholders and opinion leaders (Societal Shapers) to view the dairy industry and its products in a positive manner.	<ul style="list-style-type: none"> <li>Continued liaison with key decision makers, stakeholder groups and opinion leaders to promote a positive understanding of the dairy industry in key policy areas.</li> <li>Continued distribution of information booklet to promote the Australian Dairy Industry</li> <li>National and regional networking events to develop and maintain positive understanding of the dairy industry with federal and State MPs, local government, departments, agencies and business networks.</li> </ul>	<ul style="list-style-type: none"> <li>No change</li> </ul>

## Evaluation & Budget

Project	Evaluation		Expenditure Planning				
	Planned BCR	Investment Attractiveness	2015/16 Actual	2016/17 Forecast	2017/18 Plan	2018/19 Plan	2019/20 Plan
P153 Dairy Industry's Sustainability Framework / Strategy	3.66	7.0	479,175	394,556	400,000	300,000	300,000
P172 Industry Issues Management		7.4	199,909	56,290	-	-	-
P177 Managing Supply Chain, Food Safety and Integrity Issues	2.04	5.1	747,375	716,777	250,000	250,000	250,000
P227 Human Nutrition Research & Science	1.60	3.4	363,778	430,374	495,340	349,900	200,000
P233 Policy Support for Improving Animal Health & Welfare	15.83	7.9	379,229	358,166	184,000	264,000	264,000
P259 Technical Policy Support	2.03	5.7	-	148,282	230,000	220,000	210,000
P235 Policy Support for Improving the Profitability & Competitiveness of the Dairy Industry		5.1	107,822				
P243 Societal Shapers	1.93	4.2	65,429	26,974	55,000	55,000	55,000
P261 Access to Agvet Chemicals	TBA	TBA		15,000	60,000	50,000	-
<b>Total</b>	<b>5.46</b>	<b>8.2</b>	<b>2,421,975</b>	<b>2,146,418</b>	<b>1,674,340</b>	<b>1,488,900</b>	<b>1,279,000</b>
<b>Notes</b>	<b>P234-Other Policy Support, and P235-Policy Support Competitiveness, have been combined to create P259-Technical Policy Support</b>						

Industry Risk & Reputation Management			
Key Milestones			
Project	Milestone Description	Planned	Status
P153 Sustainability Framework	Release of Sustainability Progress Report each year	March each year	Ongoing
P227 Human Nutrition Research	Publication of research papers in peer-reviewed scientific journals	Ongoing	Ongoing
P233 Policy Support for Improving Animal Health & Welfare	Annual report on phase-out of routine calving induction	Dec each year	Ongoing
	Biennial Animal Husbandry Survey	July 2016	Biennial
P259 Technical Policy Support	Research and respond on an as-needs basis to policy and regulatory issues affecting dairy's operating environment and competitive edge. Issues may include water, energy and climate change, intensification and land use planning, gene technology, access to labour, infrastructure and tax	Ongoing	Ongoing
P243 Societal Shapers	Annual Legendairy breakfast in Parliament House, Canberra; two dairy regional events with RDPs.	By 30 June each year	Ongoing
Key Performance Indicators (KPIs)			
Target Outcome	Measure	Source of data	Targets 2017/18
Effective policy support	ADF / ADPF satisfaction with DA support	Survey	TBA
External recognition of Australian food quality	Acceptance of AMRA Sampling Plan by the EU	DA data collection	Accepted
Industry recognition of the sustainability framework	Participation in annual sustainability forum	DA data collection	Achieved
Improved industry sustainability credentials	Dairy's approach to sustainability used as a model for other industries	DA data collection	Targets / KPIs adopted by all sectors of the dairy industry
P226 Strengthen health and nutrition strategic partnerships, relationships and engagement to foster and facilitate societal trust and respect	Paid partners	Partnership Activity reports	4 articles, 2 social posts, 1 webinar
	Unpaid partners		3 third parties identified and deliver joint scientific dairy message – via updating their website, a joint media release or social media of latest science

## Knowledge & Insights

### Overview

<b>Market Need / Context</b>	<ul style="list-style-type: none"> <li>There is a need for provision of timely, credible information to dairy industry participants and stakeholders as a basis for decision-making and investment.</li> <li>DA also needs access to this information for internal planning requirements in addition to being able to offer this information as a resource to stakeholders</li> <li>DA is uniquely placed to serve as a centralised collection point for key data on a confidential basis from key manufacturers and government sources.</li> </ul>	
<b>Overall Objective/s</b>	<p>Central collection, analysis and distribution of information that:</p> <ul style="list-style-type: none"> <li>Assists stakeholders in their business decision-making</li> <li>Informs and assists internal DA programs and projects, including strategic planning.</li> <li>Promotes general understanding of the Australian dairy industry</li> </ul>	
<b>General Approach / Strategy</b>	<ul style="list-style-type: none"> <li>DA sources data cost-effectively for industry by maintaining a central database of domestic and international data series that can be accessed by stakeholders. The knowledge that is developed from these activities is then used to facilitate DA and industry-level business planning and prioritisation for the positioning of dairy in national and international debates on dairy's economic, social and environmental contribution.</li> <li>This area also encompasses stakeholder surveys that allow DA to understand farmer demographics, sentiment, issues and intentions, evaluate issues addressed by programs and incorporate key challenges and issues into strategic planning.</li> <li>DA undertakes extensive personal engagement with stakeholders to communicate and expand on the findings of DA market insight publications.</li> <li>Leverage existing DA reputation in market to build and maintain reputation for being impartial, Australian and informed in international markets.</li> </ul>	
<b>Collaboration &amp; Dependencies</b>	<ul style="list-style-type: none"> <li>The majority of Australian dairy manufacturers provide commercially sensitive production, sales and price data to DA, which enables development of 'whole of market' insights for Australian dairy industry stakeholders that would otherwise cost a significant amount of money to purchase from third-party providers.</li> <li>RDP's assist the program with the identification of regional extension opportunities for the market insights.</li> <li>Engagement with Australian dairy manufacturers to assist identify potentially valuable areas of investment.</li> <li>Relationship and preference development in international markets is based on information from Market Insights and Information. Leveraging the existing branding as a trusted source of information provides opportunities to continually refine and update our understanding of the global dairy trade environment. This then preserves the organisation's reputation in market for future development.</li> </ul>	

### Program Detail

Project No. / Title	Project Level Objectives	Focus	2017/18 Focus / Changes
P237 Market Information and Insights	To support industry profitability through the provision of high quality data and analysis which supports short and long term planning.	<ul style="list-style-type: none"> <li>Complete the rebuild of the domestic sales database and commence rollout and utilisation. Implement the Tableau Business Intelligence Tool and promote the new facility to dairy manufacturers.</li> <li>Continued review of existing DA market publications to ensure value delivery while exploring the value of new tools and insights.</li> <li>Rollout of the Pathways to Profitable Growth collaborative framework, particularly in relation to underpinning State Growth Plans.</li> <li>Rollout and communication of the Economic Multipliers of the Australian dairy industry.</li> <li>Undertake analysis on the effectiveness of risk management tools being utilised by the Australian dairy industry.</li> <li>Refine the approach to the international market research program to acquire market insights for dairy exporters and to provide insights for the DA Trade / International Marketing programs.</li> <li>Provision of evidence based information (for farmers, regulators, policy makers, potential investors and investment facilitators) to support the flow of sustainable capital into the Australian dairy industry</li> </ul>	<ul style="list-style-type: none"> <li>Finalise rebuild and validation of the domestic sales database. Transition to modernised reporting infrastructure.</li> <li>Ongoing review of existing DA market publications to ensure value delivery while exploring the value of new tools and insights.</li> <li>Provision of evidence based information (for farmers, regulators, policy makers, potential investors and investment facilitators) to support the flow of sustainable capital into the Australian dairy industry</li> <li>Consider ways of developing insights from international market development program to inform industry publications like InFocus and Situation and Outlook</li> </ul>

Knowledge & Insights							
Evaluation & Budget							
Project	Evaluation		Expenditure Planning				
	Planned BCR	Investment Attractiveness	2015/16 Actual	2016/17 Forecast	2017/18 Plan	2018/19 Plan	2019/20 Plan
P237 Market Information and Insights	2.73	4.9	1,210,720	879,850	726,667	734,167	741,892
Notes	Overall increase should be less than 5% per annum. Some contracts need additional funds allocated to them because fees regularly increase (Supermarket sales data, some reporting services (Grain info) software subscriptions and the like).						
Key Milestones							
Project	Milestone Description					Planned Completion	Status
P237	Delivery of 3 Situation and Outlook reports over the year. Loosely timed around Feb, Jun, Sep but subject to variation based on industry feedback and data availability.					28/2/17, 30/06/17 30/09/17	Complete In Planning
	InFocus 2017 finalised prior to DA AGM in November.					30/11/17	
Key Performance Indicators (KPIs)							
Target Outcome	Measure		Source of data		2016/17 Targets	2017/18 Targets	
Situation and Outlook	Number of reports delivered over the year.		Multiple, analysis creation		3 - Loosely around Feb, Jun, Sep. Timing will vary based on industry feedback and data availability	same	
InFocus	InFocus 2016 finalised		Multiple		Prior to DA AGM in November	same	