

VOLUME 3



Research Roadmap VOLUME 3

*Advancing the Discussion
About Food and Agriculture*



★ U.S. Farmers  Ranchers Alliance® ★

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OVERVIEW



Food impacts everyone. After all, we all eat and many of us are responsible for feeding our families. Today's consumers are continually in search of more information about the food they are purchasing – whether in grocery stores or restaurants.

Since 2011, the U.S. Farmers & Ranchers Alliance® (USFRA®) has been working to engage in a dialogue with consumers and key influencers who have questions about how today's food is grown and raised to **increase confidence** and **trust in today's agriculture**.



Build trust in the **BRAND** of American agriculture



Gain the public's permission to **OPERATE FREELY AND RESPONSIBLY**

To achieve this open, balanced dialogue, USFRA is bringing the farmer and rancher voices to the table, connecting them with influential consumers and thought leaders. By answering tough questions and committing to a respectful dialogue, farmers and ranchers are building the public's trust in American food production. Over the last three years, we have conducted research to help us develop a roadmap to advance these thoughtful discussions.

First, we needed to understand how our audience views the industry and identify their real concerns. The **Research Roadmap Volume 1 (2011)** illustrated the disconnect between skeptical consumers and food producers, showing that people are concerned with – or just didn't understand – the way farmers and ranchers produce food. USFRA then set out to break down these barriers and build a level of trust by listening to and addressing consumers' concerns with the **Research Roadmap Volume 2 (2012)**. This year, our **Transparency and Consumer Trust Survey** gives us the insights to begin providing consumers with the information they desire when making food purchasing decisions.

This movement to restore trust in farming and ranching is only the beginning and each day there is more work to be done. Fully understanding that the consumers' main concern is the **long-term health of their families**, we must be more responsive to their concerns, be more open and focus on **continual improvement** to advance the conversation. Farmers' and ranchers' voices play an important role in these conversations. To learn more about joining the movement, email info@FoodDialogues.com or call **636-449-5086**.



AUDIENCE



We spoke with Consumer Food Connectors, a group of well-educated individuals that are concerned with food issues and take the time and effort to communicate about those issues with others, to provide a sharper focus on the conversations about how food is grown and raised. While this group only accounts for **10%** of the population, they are the “tail that wags the dog” in terms of opinions about food and influencing many decision makers.

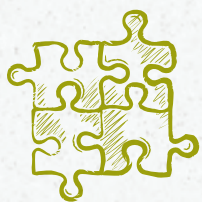
- » **Moveable Middle:** They are neither strongly for nor strongly against conventional agriculture.
- » **Opinion Elite:** They are in the top 20% of society in terms of education, income and news consumption.
- » **Influencing Others:** They influence people outside of their immediate family on issues of food, cooking, safety, health, nutrition, the environment, hunger or agriculture. Additionally, this group has a much broader societal impact on food issues (often blogging several times a week) with the ability to impact influencers in policy, entertainment and other industries.

Consumer Food Connectors are different from the average consumer:

- » They are more skeptical.
- » They are more aware of food issues.
- » They are more focused on quality.



METHODOLOGY



To better understand how consumers view the agriculture industry, USFRA conducted extensive research using different vehicles to interface with Consumer Food Connectors during each of the three studies.

One such vehicle is **Instant Response Dial Sessions**, which allow moment-to-moment responses to videotaped messages. Unlike traditional focus groups, this methodology provides real-time, graphic representation of participants' emotional reactions to messages and allows for in-depth, substantive discussion about which messages succeed, and which ones aren't effective.



We also wanted to get candid feedback from people who are highly engaged in food issues. In 2013, USFRA created the **Straight Talk on Food and Ag Community**, a private, online forum of **300** “influencers” from a variety of backgrounds – chefs, dietitians, farmers, researchers, nurses, educators and marketers – to provide timely feedback and opinions on a range of topics.



THREE STUDIES AND VEHICLES



Research Roadmap Volume 1 (2011)

1. *Ag Industry Stakeholder In-Depth Interviews*
 - Agricultural advocates from academia, journalism, marketing, public advocacy, non-profits, industry, state-level associations and individuals were interviewed beginning in April 2011.
2. *Instant Response Dial Sessions*
 - **5** different sessions with groups of 30 participants that each lasted three hours.
3. *Consumer/Rancher/Farmer Surveys*
 - Phone surveys of **2,417** consumers and **1,002** farmers and ranchers nationwide in August 2011.
4. *National Food Connectors Online Survey*
 - **1,400** Food Connectors, Opinion Elites and Consumers in October 2011.



Research Roadmap Volume 2 (2012)

1. *Instant Response Dial Sessions*
 - **4** different **3-hour** sessions with **30** participants were held in different parts of the country.
2. *Consumer/Rancher/Farmer Surveys*
 - Phone surveys of **1,250** consumers and **501** farmers and ranchers nationwide in October 2012.
3. *National Food Connectors Online Survey*
 - Outreach to Food Connectors, Opinion Elites and Consumers in October 2012.



2013 Transparency Survey

1. *National Food Connectors Online Survey*
 - **1,019** Food Connectors and Consumers in May 2013.
2. *Straight Talk on Food and Ag Community*
 - A private online forum made up of **300** “influencers” who are highly engaged with food issues provided feedback and opinions on a range of topics.
3. *Individual Interviews in New York*



BASELINE: THE FOOD DIALOGUES DYNAMIC

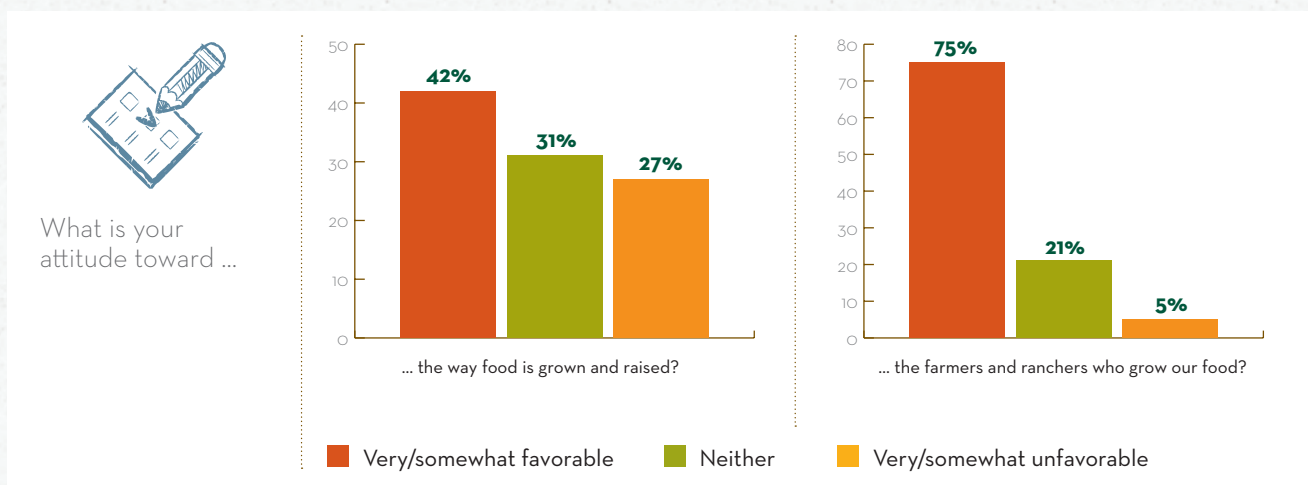


Research Roadmap
Volume 1 (2011)

Effective communication starts with understanding how your audience sees the industry and the real concerns they bring into the conversation. The Research Roadmap Volume 1 (2011) provided a snapshot of the disconnect between skeptical consumers and food producers.

1. IT'S NOT YOU; IT'S THE METHODS.

While every major message we tested was interpreted negatively or neutrally by our target audiences, many people were absolutely favorable towards farmERS and ranchERS. They were not favorable toward farmING and ranchING.



ml+p, October 2011, n=1,400

2. CONCERNS ARE REAL.

Simply, people were concerned about the way farmers and ranchers produced our food.

- >> **58%** said they **think about HOW** the food they eat is grown or raised frequently
- >> **71%** said they have **“serious or some concerns” about the methods** that conventional, non-organic agriculture uses
- >> **53%** wondered frequently if the food they buy is **safe**



3. SOMETHING'S JUST NOT WORKING.

Despite numerous worthy efforts to improve how we communicate, the disconnect between skeptical consumers and food producers felt like it had never been greater.

So the U.S. Farmers & Ranchers Alliance set out to try to understand why – and what we can do about it.

This is well-traveled ground, so the first step was to immerse ourselves in the wide range of research and messages that have been developed by different groups and companies across agriculture. Grounding our exploration in those findings, our goal was to better understand the emotional impact of the wide range of ways the industry communicates today – and how our key audiences interpret those messages.

At a very high level, what we learned was extremely instructive. While differing by degree, **every major message we tested is interpreted negatively or neutrally by our target audiences.**

YOU SAY ...	THEY HEAR ...
Modern food production methods are proven SAFE	We don't know if pesticides, antibiotics or hormones are safe in the long-term – and neither do you.
Modern food production keeps food AFFORDABLE	At what expense to my family's health – is this a tradeoff?
Modern food production is necessary to FEED THE WORLD	I care more about the well-being of my family than of the world.
The industry is primarily made up of FAMILY-OWNED farms	The images we see of family farms are local or organic – not where most food comes from.
Modern food production keeps food ABUNDANT	We already have an abundance of food.
WE CARE about our land, animals and customers	You will take profitable shortcuts if and when you can.
Modern food production is necessary for FOOD SECURITY	You want subsidies and lax regulation.
Modern food production gives consumers more food CHOICES	I don't want choices that aren't safe.



TRUST: IT'S PERSONAL. IT'S ABOUT THEIR FOOD.



Research Roadmap
Volume 2 (2012)

The fundamental concern eroding trust is the **long-term health effects of the food they put into their bodies**. Everyone is a stakeholder when it comes to food, because we all eat.



1.

Consumers are most concerned about long-term health.

- Cancer
- Obesity
- Diabetes
- Heart health



2.

Anything deemed not "natural" is a threat.

- Antibiotics
- Hormones
- Pesticides
- Herbicides
- Biotech (aka GMOs)
- Chemicals
- Packaged food ingredients
- Factory farms



3.

Science/logic does not help – "if we put it in our bodies, we don't want anything that messes with nature."

language to LOSE - 

- = Amount is minuscule
- = Research shows it's safe
- = Let us feed the world
- = Keeps prices low
- = Better for the environment

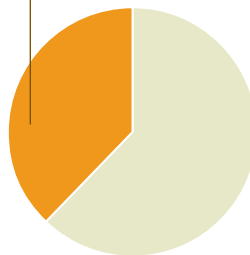
4. THIS IS ABOUT TRUST.

- >> We don't have the **benefit of the doubt**.
- >> Our audience is **suspicious of our motives**.
- >> They **challenge** our facts.
- >> They respond **emotionally** rather than rationally.
- >> They believe farming and ranching is **big business**.

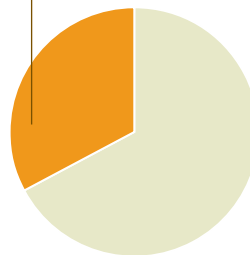


Trust is dead.

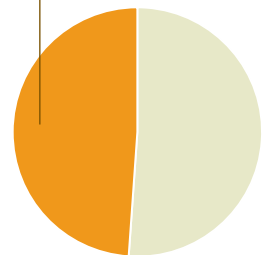
Only **38%** trust the **government** to do what's right.



Only **33%** say the **media** gets their facts straight.



49% say **conventional agriculture** is on the wrong track.



TRANSPARENCY: TRUST IS BASED IN TRUTH



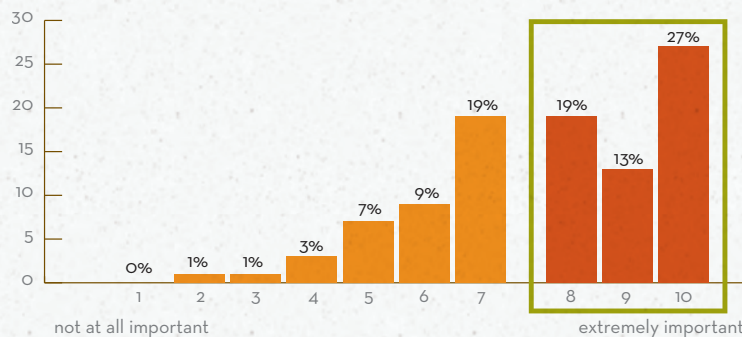
2013 Transparency and
Consumer Trust Survey

By 2013, we found that most consumers believe the industry is doing a good job. But, that doesn't mean they don't have questions about where their food comes from. Recently, we've noticed a particular topic take a leading role in conversations about food: **transparency**.

What does **transparency** mean to consumers? And, what does that mean for the food industry? These questions are not new; however, we need to shift our thinking from the old transparency to **transparency 2.0**.

1. THE INTEREST IN TRANSPARENCY IS REAL.

>> **59%** of respondents maintain that it is **extremely important** for grocery stores and restaurants to provide information about the way the food they sell was grown and raised.



>> The demand is **increasingly important** ... it's almost right up there with cost.

	Total	Consumers	Connectors
>> How much a food item costs	55%	60%	37%
>> How much information I know about how or where the food item was grown or raised	45%	40%	63%



>> Most consumers say they need **more information**.

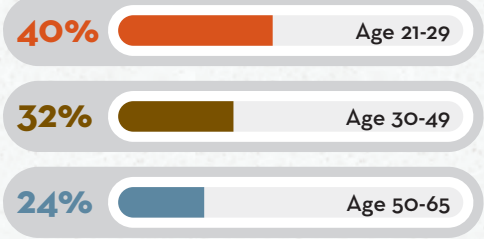
	Grocery Stores	Chain Restaurants	Independent Restaurants
>> I have MORE information than I want	12%	7%	7%
>> I have about the RIGHT AMOUNT of information	33%	25%	34%
>> I have LESS information than I want	56%	65%	58%

2. THE TRANSPARENCY GENERATION.

Young shoppers (ages 21-29) or the “transparency generation” are more likely to purchase one food item over another **based on which item includes more information about its origin.**

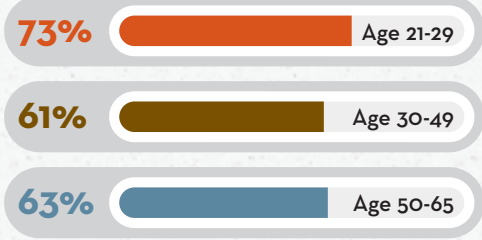
>> When asked, “In the past year, how often have you chosen to buy or order one food item over another because it offered more information about how or where it was grown or raised?”

Answer: ALMOST ALWAYS/OFTEN



>> When asked, “Imagine you’re buying some frozen vegetables. Two bags of frozen vegetables are of equal weight and price. The first bag tells you on the label where you can go online to get more information about how the vegetables were grown. The second bag of vegetables does not. How much more likely are you to buy the first bag of vegetables?”

Answer: MUCH/SOMEWHAT MORE



3. TRANSFORMING “OLD TRANSPARENCY” TO “TRANSPARENCY 2.0.”

In a nutshell, what does this mean? **It’s not about telling consumers EVERYTHING – it’s about telling them something.** And all food has an important and positive story to tell ...

THE OLD TRANSPARENCY

- 1 Calling out the absence of things makes consumers uncomfortable
- 2 Conveying when a product is perceived to be grown or raised as superior
- 3 Relying on labels to provide the information about how food is grown and raised
- 4 Using certifications to reassure customers

VS

TRANSPARENCY 2.0

- 1 Providing some information in order to make consumers feel more comfortable
- 2 Sharing information whether it’s superior or not
- 3 Taking advantage of opportunities to deliver information about how food is grown and raised across the supply chain
- 4 Using information – certified or not – to reassure consumers

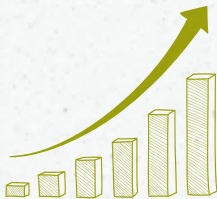
4. BUILDING TRUST: THE EVOLUTION OF USFRA’S MESSAGE.

Some parts of the food and agriculture industry are telling the narrative of where food is grown and how it’s raised to build equity amongst their brands.

- >> If we don’t fill that **information vacuum**, someone else will. And most likely, in this environment of distrust of corporations, industries and the people in charge of keeping food safe, it will not be in our favor.
- >> The **lack of information** sends the message that we have something to hide. **4** out of **10** surveyed agree.

	Total	Consumers	Connectors
>> The food industry has something to hide	40%	38%	46%
>> Most people don't want to know more	27%	23%	22%
>> The information is difficult to provide to consumers	24%	23%	24%
>> There's enough information out there already	10%	11%	8%

LANGUAGE OF CONTINUAL IMPROVEMENT



We need to recognize that there is no one proven message or tactic that can build trust. And the communication environment is shifting dramatically. Old messages such as “safe, affordable and abundant” fall flat with our audiences. We must be more relevant and open, and focus on continual improvement to shift and advance the conversation.

ACKNOWLEDGE CONCERNS

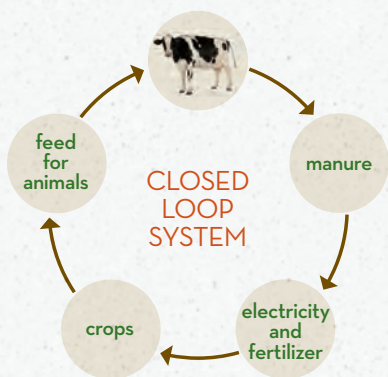
- >> Consumers rightfully want to make sure we are treating animals well, maintaining food quality and food safety, and doing our jobs in ways that don't harm the environment. So we want them to know: **we hear your concerns, and we are committed to answering your questions.**

FOCUS ON THE FUTURE AND ON CONTINUOUS IMPROVEMENT

- >> American agriculture has a history of finding new and better ways to do things. In the past 50 years, we have figured out how to grow the same amount of food on half as much land. People are excited to hear about production improvements — especially those that enhance quality and improve **long-term health effects.**

SHARE PERSONAL STORIES AND USE CONCRETE EXAMPLES

- >> Remember, consumers trust farmERS and ranchERS. Farmers and ranchers have continued to improve how they farm and ranch, and consumers want to hear those **detailed stories:**
 - Messaging
 - Storytelling
 - Experience



- >> Sustainability means using what we already have in a more efficient way.
 - For example, dairy cows produce a lot of manure, and we know that is a big environmental challenge. But it can also be an opportunity. Some farms today recycle **100%** of the manure produced by cows, including using it as electricity on their farms and as fertilizer for their crops. Then when those crops are harvested, they come right back to the farm as feed for the animals. That **closed loop system** minimizes those farms' carbon footprint and creates a more sustainable future.

- >> **A key note** – people do think our food is safe, but their trust issues come from these deeper concerns about transparency.
 - **General Consumers** prioritize **price** but **Consumer Food Connectors** prioritize **information.**

General Consumers



How much is it?

Consumer Food Connectors



Tell me about it.

SHAPING THE CONVERSATION



The USFRA research uncovered the best way for farmers and ranchers to talk about specific topics in order to address consumers' concerns.

One Caveat: This language is not a silver bullet, meaning it does not make everyone okay with our methods. It is the best way that we tested to answer questions on these tough issues. There are also key moments in time when other information and messages need to be shared, particularly during a deep focus on an issue.



SUSTAINABILITY

People like hearing how farms are **recycling, reusing and minimizing waste**. There's surprisingly low awareness of these efforts today and these improvements sound natural, yet progressive. Common sense stories about recycling, reusing and minimizing waste resonate better than more complex subjects like soil erosion, nitrogen runoff and greenhouse gas reduction.



language
to USE +

An increasing number of farmers and ranchers are working to make their operations more recyclable and self-sustaining.

Many farms today are capturing and reusing the water used in raising animals and growing crops. They're creating closed loop systems by using animal manure as fertilizer on crops. Some innovative ranches are working on methane digesters that can capture methane gas as manure breaks down. The gas is then turned into electricity that can power farms or be sold back to the community power grid.



GM SEEDS

Regardless of what you call them, biotech seeds are something with which many American consumers are currently uncomfortable. While we may not be able to make them comfortable eating food from biotech seeds, adding the right context can create a more nuanced perspective. This allows influencers to see the benefits of biotech for **a segment of farmers and a segment of consumers**, especially related to environmental impact and feeding third-world countries.



language
to USE +

During the middle of the last century, concerns grew about things like the use of water, the need for chemicals to protect plants from bugs and weeds, and soil runoff. Researchers came up with biotech seeds to create crops that solve nutritional deficiencies. For example, genetically altered "golden rice" produces beta-carotene that has the potential to help up to 250 million children each year who go blind as a result of vitamin A deficiency.

Researchers also created seeds that grow into plants less susceptible to drought, so farmers could grow food in more arid conditions. Some of the biotech seeds grow into plants that are more resistant to pests, thus requiring fewer pesticides.



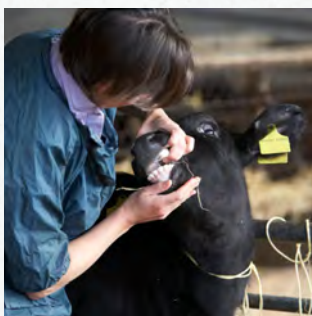
ANIMAL CARE

Most people simply want to know that **animals are not being abused**. Your audience wants to know that farmers and ranchers are preventing abuse and **punishing bad actors**. This is also an area when talking about the basics can be valuable. For example, many animals are kept in barns to protect them from predators and inclement weather.



language
to USE +

Farmers and ranchers are committed to the safest and most appropriate care for their animals. They are tightening standards and implementing training programs to ensure that everyone on farms and ranches knows the right thing to do and, more importantly, understands the consequences of doing the wrong thing. And they are implementing stricter penalties when unsafe or dangerous practices are uncovered.



ANTIBIOTICS

The public has many concerns about antibiotic use in farm animals and the creation of antibiotic-resistant bacteria because of their use on farms. The more we can show that preventing this development is a shared concern, the more trust we can build. Additionally, sharing facts can be very powerful.

- >> Many antibiotics used on farm animals, particularly those used to prevent illness, **are not the same antibiotics used to treat humans**.
- >> Not treating a sick animal with antibiotics can lead to suffering, death and more disease in other animals.
- >> Even animals under the best care and in the cleanest circumstances get sick and need to be treated.
- >> We don't feed our animals antibiotics continuously – we use them **judiciously under the care of a veterinarian**.
- >> Farmers and ranchers don't like to overuse antibiotics because they are expensive.



language
to USE +

Farmers and ranchers across the country hear your concerns about antibiotics and are committed to responding. In particular, we heard your concerns about antibiotic resistance in humans. Although there isn't any link to antibiotic use in farm animals creating resistance in humans, we too are concerned about any potential for this to happen.

Farmers and ranchers are investing heavily in research to find alternatives. For example, we have been working with scientists and researchers to explore additional antibiotics that can be effectively applied to animals, but are significantly different from those that would ever be used to treat humans.





HORMONE USE

While most consumers still eat animal products raised with hormones, they're convinced it has a negative impact on their health. Trace amounts of hormones, even at levels deemed safe, are the exact reason consumers have concerns about their use. Pointing out the long-term use of hormones and their use as a dietary supplement help provide context.

- >> We use hormones **under the guidance of veterinarians and animal nutritionists.**
- >> **"Leaner meat"** is a more acceptable benefit than "more meat."

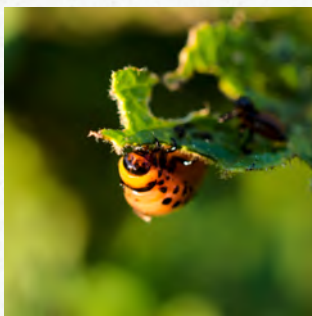


language
to USE +

Hormones, which have been used by American farmers and ranchers since the 1950s, are also used in Canada, Argentina, New Zealand and many others countries across the developed world.

They're given to animals only in targeted ways - in very low doses and at particular times in the animal's life.

Studies have shown that hormones pose no risk to consumers. Hormones are present in our food even with animals that haven't been given growth hormones. They occur naturally in farm animals like dairy cows and in some produce.



CROP PROTECTION

Influential consumers are uncomfortable with some conventional methods of crop protection – the use of pesticides, fertilizers and herbicides. Improvements that enable farmers and ranchers to use them less and more precisely answer consumer concerns and demonstrate that **the industry IS listening.**



language
to USE +

Between **20% to 40%** of the world's potential crops are destroyed each year because of weeds, bugs and diseases. Farmers and ranchers have many ways to protect their crops and help them thrive by using pesticides, fertilizers and herbicides.

Crop protection overuse negatively impacts farms, business and the environment. That's why farmers utilize sophisticated ways to understand the precise amount of inputs needed in a particular field.

Farmers use soil testing not just on a field, but on different parts of a field, and apply exactly the right amount – or none at all – at exactly the right time, at the right place, so that crops can survive and thrive.



EDUCATION AND YOUNG FARMERS

Education is a key value in farming and ranching. Today, many farmers' children are pursuing higher education to learn about cutting edge science as a well as business management. As a result, the industry is **constantly evolving and moving forward.** To run a large family farm today, it takes education, understanding technology, and the commitment of continuous learning.



language
to USE +

Farmers know the best way to stay in business and thrive is to educate their young people. They also know that they need to work with scientists, environmentalists and researchers to keep improving their land and production techniques.

Farmers and ranchers can't afford to keep doing things like their grandparents did. It's too costly for them and the environment. The future of farming improves through **research, training** and most of all, **education.**

USFRA: GOING WHERE AGRICULTURE HAS NEVER GONE



More people than ever before are interested in learning more about where their food comes from, and how it gets from farm to plate. As farmers and ranchers, we have something to say about a topic many people care about.

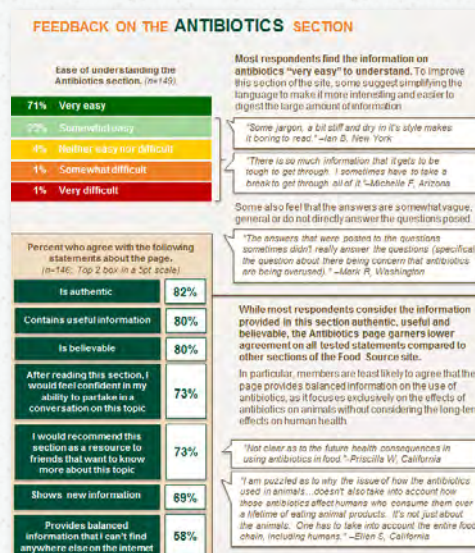
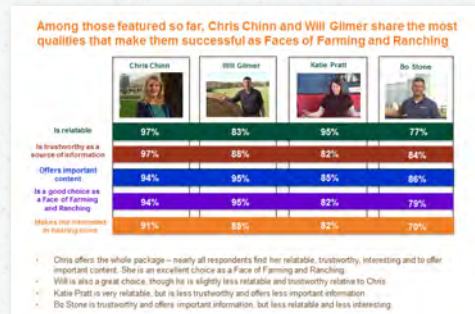
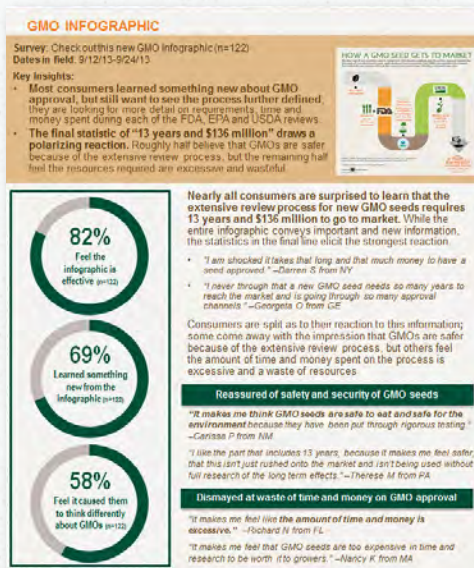
Hundreds of farmers and ranchers are engaging in conversations with consumers every day about how they raise and grow food. Their voices are being heard online and in major national media to help earn consumer trust in food.



STRAIGHT TALK ON FOOD AND AGRICULTURE

In spring of 2013, USFRA developed the **Straight Talk on Food and Ag Community** – a private, online community of a total of **300** influencers from a variety of backgrounds – food experts, chefs, nutritionists, researchers, nurses, educators, marketers and consumers – who are highly engaged in food issues. They bring a great deal of knowledge and expertise to their role as consultants to USFRA while providing open and honest feedback.

So far, USFRA has tested the impact of the newly redesigned **FoodDialogues.com**, **FoodSource web pages**, USFRA's **partnership with Anderson Live**, **Food Dialogues panel discussion footage** and **content including op-eds and blog posts** tackling a variety of issues facing agriculture today.



MOBILIZING OUR BASE

Faces of Farming and Ranching

- » Four farmers and ranchers were selected from a national pool to help put real faces to American agriculture. They serve as spokespeople, sharing stories and experiences on a national stage to help answer consumers' questions about how food is grown and raised.



Conversation with E.A.S.E. Program

- » USFRA offers specialized training sessions designed to help those who produce food lead productive conversations with those that have questions. Since its inception in late 2011, more than 8,000 farmers and ranchers have participated in the **E**ngage, **A**cknowledge, **S**hare and **E**arn Trust Program.



Grow What You Know FARM Team

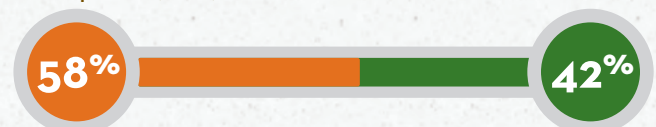
- » The **Farmer and Rancher Mobilization (FARM) Team** distributes the latest updates from USFRA to farmers and ranchers. The FARM Team also equips farmers and ranchers with ways to get active and share factual information about how they grow and raise food – whether it's through blogging, sharing their story using our share function on FoodDialogues.com or writing an editorial to a media outlet. More than 400 farmers, ranchers and agriculture professionals have joined the team to date.

GETTING HONEST FEEDBACK FROM CONSUMER FOOD CONNECTORS

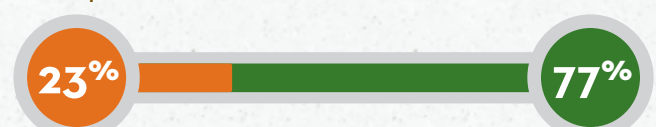
USFRA is currently testing and proving additional content through online focus group evaluations. Feedback includes positive information on how agriculture is moving the needle in the arena of public perceptions.

- » After participating in the content impact focus groups, Consumer Food Connectors are more likely to believe the U.S. is heading in the right direction in the way our farmers and ranchers grow and raise our food.

Pre-exposure (N=45)



Post-exposure (N=34)



● wrong direction ● right direction



CONSUMER PERCEPTIONS



In 2013, USFRA surveyed **500** General Consumers and **500** Consumer Food Connectors to better understand their perceptions of American agriculture.

KEY FINDINGS

- >> We are doing a **good job**.
- >> People believe farmers and ranchers are **committed to sharing information** and that it is reasonably available.
- >> Consumers continue to be focused on **long-term health effects and benefits**.
- >> All audiences generally believe our **food supply is safe**. In terms of concerns, hormones, antibiotics and crop inputs are at the top of the list, higher than GMOs.



ABOUT USFRA

The U.S. Farmers & Ranchers Alliance® (USFRA®) is a first-of-its-kind alliance comprised of 80 farmer- and rancher-led organizations and agriculture partners representing all aspects of agriculture working together to answer questions about how food is grown and raised.

ABOUT FOOD DIALOGUES

Food Dialogues® signature events are designed to bring together farmers, ranchers, industry experts, pundits, media and consumers for dynamic panel discussions on some of today's most pressing topics related to food and food production. Since its launch in 2011, the U.S. Farmers & Ranchers Alliance has hosted five major events, including 14 panel discussions. To watch content from past events, visit FoodDialogues.com.





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