

2013



Stakeholder Annual Report

(October 1, 2012 – September 30, 2013)



★ U.S. Farmers  Ranchers Alliance® ★

CONTENTS

- Letter from the Chairman2
- Values, Commitment, Vision and Goals3
 - Our Values, Our Commitment3
 - Our Vision.....3
 - Our Goals3
 - How Is the USFRA Movement Different?4
 - USFRA's Ultimate Mandate5
- 2013 Metrics and Accomplishments.....6
 - Our Strategy6
 - Open Dialogue7
 - Transparency9
 - Personal Connection with Farmers.....11
 - One Voice14
 - Key Outcomes16
- 2014 Key Activities17
- Governance Structure.....18
- 2013 Overview by Strategic Objectives19



LETTER FROM THE CHAIRMAN

Dear USFRA® stakeholders, affiliates and partners,

For three years now, I have served as Chairman of the U.S. Farmers & Ranchers Alliance, and I continue to be immensely proud of the work we are doing. When USFRA was formed, it was expected to be bold and unconventional, and to serve as a leader for the agriculture industry. The founding organizations of the Alliance set the bar high, and I continue to watch us meet that bar and then set it higher.

One of the best examples of that is our overarching strategy of inviting multiple voices to share in a common dialogue. That was risky in 2011, and still new in 2012. But as 2013 emerged, I saw a multitude of other organizations, commodity groups, media outlets and others all hosting their own “dialogues.” It’s wonderful to see that agriculture has been so passionate about being involved in these conversations about food and food production. We have a lot to say, and a lot to be proud of, after all.

Looking back on the success of our Food Dialogues program often leads me to wonder: what’s next? Where will USFRA lead us in 2014 and beyond? What more can our industry do to help further engage with the people who are buying food and asking questions about where it came from?

This coming year, we are excited about a film from an award-winning director. This documentary is a close look at young farmers and ranchers who are taking over their family’s farm – and one just starting out – that will help re-introduce agriculture to a population who is often disconnected. We are hopeful that a project like this, being brought into popular culture will spark many, many conversations about farming and ranching today in cities across the country.

So what is beyond 2014? The USFRA leadership continues to look at ways to further build trust in today’s food system, and we are working closely with customers, influencers, and farmers and ranchers to bridge the gaps that exist in that food system. Because all of us have a responsibility and a desire to work together to help consumers understand more about their food. Who better to lead that effort than the farmers and ranchers across the country?

We hope you will join us this coming year, and we look forward to what we can accomplish together.

Sincerely,

A handwritten signature in black ink, appearing to read 'Bob Stallman', written in a cursive style.

Bob Stallman, USFRA Chairman



VALUES, COMMITMENT, VISION AND GOALS



Our Values, Our Commitment

We are the farmers and ranchers of America. Americans and their children eat and drink what we grow and raise. Our life's work feeds and nourishes our families, our neighbors, our communities and our country. We embrace this great responsibility as stewards of our food, our land and our animals. We commit to working together – regardless of type, size or philosophy of our farms and ranches – to continue improving our food supply. We commit to doing everything in our power to protect and improve human health and the enjoyment of our food. We commit to making the environment – the land, air and water that belongs to all of us – healthier and sustainable for all generations. We commit to keeping our animals healthy and well cared for. We commit to the business of farming and the health of our economy, knowing that what makes our businesses stronger is producing the highest quality products. And we commit to sharing information about our methods freely and openly. Farming and ranching is our profession – but for most of us, it is also our life. The food we grow and raise reflects our characters, our commitments and our lives.



Our Vision

We want consumers to know that America's farmers and ranchers share their values and are committed to answering Americans' questions about how we raise our food – while being stewards of the environment, responsibly caring for our animals and maintaining strong businesses and communities.



Our Goals

- >> Enhance consumer trust in the U.S. food production system
- >> Maintain and enhance the freedom of U.S. farmers and ranchers to operate in a responsible manner
- >> Strengthen collaboration within the food production, processing and distribution systems



How Is the USFRA Movement Different?



ONE VOICE

A broad spectrum of agricultural voices have **joined forces** at a deeper level than ever before



ENGAGING

For the first time, today's agriculture will engage America in **an inclusive dialogue**, seeking a two-way conversation



LEADING THE CONVERSATION

Setting the agenda, not reacting to attacks



A LONG-TERM MOVEMENT, NOT A CAMPAIGN

The viability and leadership of the industry is paramount, not promoting one product or one moment in time



ENTRY TO POPULAR CULTURE

Going to **new and different places** where today's consumers and influencers get their information

All Our Work Must ...



1. Lead and engage in dialogue
2. Take ag to a higher level and unexpected places
3. Be proactive, not reactive
4. Focus on the language of food, not science
5. Focus on continual improvement
6. Answer the real questions people are asking
7. Show commitment to long-term health
8. Tell farmer and rancher stories in their own words
9. Avoid ag talking to ag
10. Inspire farmers and ranchers to act





USFRA's Ultimate Mandate

Since 2011, the U.S. Farmers & Ranchers Alliance® (USFRA®) has been working to engage in 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 – this is our ultimate mandate.**



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



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

In order to gain insights on how better to address consumer questions and concerns, we spoke with Consumer Food Connectors (CFCs). CFCs are well-educated individuals who are concerned with food issues and take the time and effort to communicate about those issues with others while providing a sharper focus on the conversations about how food is grown and raised. While this group only accounts for 10 percent of the population, they are the “tail that wags the dog” in terms of opinions about food and influencing many decision makers. This group was our focus in 2013.

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.

Opinion Elite: They are in the top 20 percent 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 and 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.



POLICY AND DECISION MAKERS

USFRA is also committed to engaging influencers in a variety of spaces including customer decision makers, policymakers, media, entertainment executives and food pundits.



2013 METRICS AND ACCOMPLISHMENTS

Our Strategy

In early 2013, USFRA identified **four key priorities** that would lead to actionable tactics to ultimately produce trust in agriculture.



1 OPEN DIALOGUE: USFRA CONVENES THE INDUSTRY AROUND KEY ISSUES

- >> Food Dialogues® Events
- >> www.FoodDialogues.com
- >> Antibiotics and GMO Issues Management
- >> FARM Team and Grow What You Know Rapid Response System

2 TRANSPARENCY: USFRA ANSWERS CONSUMERS' TOUGH QUESTIONS AND MAKES CONTENT ON AGRICULTURE EASY TO FIND



- >> www.FoodDialogues.com/FoodSource
- >> Social media channels (Facebook and Twitter)
- >> Introducing USFRA to Key Influencers and Customers: Events and Sponsorships



3 PERSONAL CONNECTION WITH FARMERS: USFRA BRINGS FARMERS' STORIES TO LIFE

- >> Faces of Farming & Ranching
- >> Announcing the James Moll film: FARMLAND
- >> Mobilizing Our Base
- >> Media Relations Program: Editorial Board Outreach and OpEds
- >> Entertainment Partnership – Anderson Live



4 ONE VOICE: USFRA PROVIDES INDUSTRY-LEADING RESEARCH, MESSAGING AND INSIGHTS FOR OUR AFFILIATES AND INDUSTRY PARTNERS



- >> E.A.S.E. Farmer and Rancher Training Program
- >> Transparency Research
- >> Consumer Perceptions – Quantitative Research
- >> "Straight Talk on Food and Ag" Online Community
- >> Ongoing USFRA Dial Testing





Open Dialogue: USFRA Convenes the Industry Around Key Issues

From antibiotics to GMOs, USFRA is leading the way in bringing experts throughout the industry to the table for honest dialogues around some of the most contentious issues in agriculture.

FOOD DIALOGUES® EVENTS

November 15 – Food Dialogues: New York

A three-panel event at The TimesCenter focused on two of today's most provocative topics surrounding food production – GMOs and antibiotics. All three panels were moderated by Ali Velshi, CNN's chief business correspondent at the time and then host of CNN International's "Your Money" and "World Business Today."



Food Dialogues: New York

Panel topics included:

- >> Media, Marketing and Healthy Choices
- >> Your Toughest Questions Answered on Antibiotics and Your Food
- >> Your Toughest Questions Answered on Biotechnology (GMOs) and Your Food

April 22 – Food Dialogues: Chicago at BIO International Convention

"The Straight Story on Biotech in Agriculture: The Media and its Impact on Consumers" was moderated by Ron Insana, Senior Analyst, CNBC and Financial Industry Expert.



Food Dialogues: Chicago at BIO International Convention

June 19 – Food Dialogues: Chicago at Kendall College

The morning panel, "Transparency and Food: Our Responsibility to Make Information Available to Today's Consumer," was moderated by Ellie Krieger, RD, host of Food Network's *Healthy Appetite*, and a *New York Times* best-selling cookbook author. USFRA's proprietary transparency research was unveiled in an afternoon panel discussion with farmers, ranchers and food customers.



Food Dialogues: Chicago at Kendall College

Food Dialogues: A Regional Event Series

USFRA offered a Food Dialogues pilot program for affiliates to host their own regional Food Dialogues panel discussions in their regions.

- >> August 11 – Food Dialogues: Ohio
- >> September 19 – Food Dialogues: Missouri
- >> September 19 – Food Dialogues: North Carolina



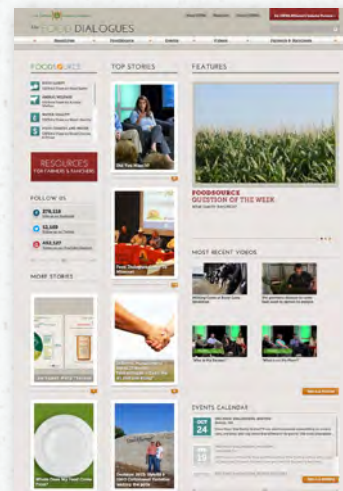
WEBSITE

In 2013, USFRA unveiled a new look on **FoodDialogues.com**, a one-stop-shop to answer questions and explore new content related to food production. The newly designed site features a stylish news-like home page and intuitive layout that allows users to easily navigate the site and engage with content. In FY2013, **FoodDialogues.com** received its **one millionth** visitor.

Honest Feedback:

Consumer Food Connectors have reacted positively to the newly designed Food Dialogues site, reporting that it provides information across topics of interest. Examples of comments include:

- >> *There is a wide-array of subjects related to food on the site from the farmers' perspective and some government related information that can help us become better informed consumers. It does also provide an opportunity to join the conversation that can enhance individuals' understanding of food matters.*
- >> *There is quite a selection of topics and viewpoints from which to choose and it was interesting to hear the various farmers and ranchers share their experiences.*
- >> *[I would tell my friends and family that] this is an informative site for information regarding food products from farmers and ranchers.*
- >> *[The website] was very educational as well as informative from hearing all different sources.*



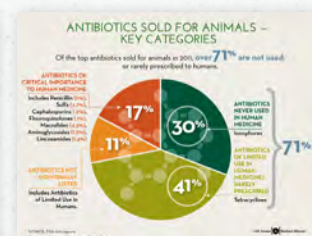
ANTIBIOTICS AND GMO ISSUES MANAGEMENT

The topics of antibiotic use on farm animals and GMOs continue to be hot-button issues covered in traditional media, discussed in social media and questioned by key influencers and consumers alike. In 2013, USFRA focused on these issues, with the goal of creating a conversation on the issues that included points of view of farmers, ranchers, veterinarians, academics and medical experts. This conversation spanned the media landscape and included key strategic programs from panel discussions to media tours and the mobilization of farmers/ranchers on social media. These efforts included:

- >> New York and Washington, D.C. Antibiotics Media Briefings – April and June 2013
- >> OpEds and letters to the editor
- >> FoodSource antibiotics content development
- >> Antibiotics-related blog posts on FoodDialogues.com
- >> Antibiotics infographics
- >> Antibiotics message maps
- >> USFRA spokesperson trainings on key topics
- >> Food Dialogues: New York separate panel discussions on both antibiotics and GMOs

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.





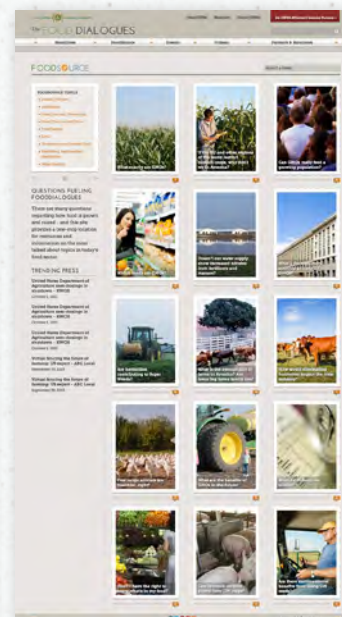
Transparency: USFRA Answers Consumers' Tough Questions and Makes Content on Agriculture Easy to Find

By creating straight-forward, easy-to-find content and implementing groundbreaking digital programs, USFRA is open and honest when answering some of the toughest questions related to food production.

FOODSOURCE — FoodDialogues.com/FoodSource

As part of the newly designed FoodDialogues.com website, USFRA launched FoodSource — a custom-created site that was built around a series of unique sections covering the nine most pressing issues in food production today:

- >> Animal Welfare
- >> Antibiotics
- >> Farm Size and Ownership
- >> Food Choices and Prices
- >> Food Safety
- >> GMOs
- >> Hormones and Growth Tools
- >> Pesticides, Fertilizer and Herbicides
- >> Water Quality



Each section features detailed answers to the **10** most frequently asked consumer questions, USFRA's official Point of View, links to original third-party sources, relevant infographics and videos featuring farmers, ranchers and experts, as well as the most relevant content from past USFRA events.

FoodSource topics pages became the most visited pages of FoodDialogues.com with more than **160,000** visitors in 2013.

Feedback on FoodSource: What the Straight Talk Community Had to Say

- >> *Nicely laid out site and easy to navigate.*
- >> *Layout of the site was impressive!*
- >> *For as concerned as I've been about health and healthy eating, I'm embarrassed to admit that I've never seen this page! From the looks of it, it appears to be helpful and informative.*

Honest Feedback

- >> *I'm sure they aren't objective, but it is a very good site and they do a good job getting the issues out there.*
- >> *I would be interested in exploring more, but not limiting my decisions to the information provided on this site.*
- >> *Yes, although it is clear that it is one sided, everyone should have a chance to tell their side. I can evaluate the information on my own.*
- >> *I would like to explore further and get a better feel for their perspective.*
- >> *We don't know enough about the farmers' and ranchers' view. This is a good thing to put their views [out there].*



Straight Talk on Food and Ag Community feedback – GMO and Antibiotics Topics

Feedback on GMO FoodSource Page:

Percent who agree with the following
statements about the page
(n=112, top two boxes in a 5-point scale)

Is authentic	91%
Contains useful information	90%
I would recommend this section as a resource to friends that want to know more about this topic	87%
Shows new information	86%
After reading this section, I would feel confident in my ability to partake in a conversation on this topic	85%
Is believable	81%
Provides balanced information that I can't find anywhere else on the Internet	72%

Feedback on Antibiotics FoodSource Page:

Percent who agree with the following
statements about the page
(n=146, top two boxes in a 5-point scale)

Is authentic	82%
Contains useful information	80%
Is believable	80%
After reading this section, I would feel confident in my ability to partake in a conversation on this topic	73%
I would recommend this section as a resource to friends that want to know more about this topic	73%
Shows new information	69%
Provides balanced information that I can't find anywhere else on the Internet	58%



SOCIAL MEDIA CHANNELS: FACEBOOK AND TWITTER

USFRA's social media platforms have given influencers and consumers alike unprecedented access to hearing the real stories of farmers and ranchers. Social media campaigns encourage farmers and ranchers to lead the conversation as it happens in real time.

- >> In 2013, the online community saw unprecedented digital engagement: Facebook engagement reached **4.65%**, a figure comparable to many brands and celebrity personalities
- >> USFRA's Facebook community grew by more than **200,755** 'likes' in FY2013
- >> Twitter followers increased by **25,795**



INTRODUCING USFRA TO KEY INFLUENCERS AND CUSTOMERS: EVENTS AND SPONSORSHIPS

Throughout 2013, USFRA sought out unique and unexpected opportunities to connect with influencers and customers in a variety of ways – Food Dialogues events, panel discussions, industry event sponsorships and blogger dinners. Such events included:

- >> USFRA-sponsored panel discussion at Multi-Unit Food Service Operators (MUFSO) Supershow with farmers and customer executives
- >> Hosted dinner with influencers and food company executives at Food Marketing Institute (FMI)
- >> Ag Day briefing and evening salon dinner for influencers with Katie Pratt, Faces of Farming & Ranching spokesperson
- >> USFRA dinner and dialogue at BlogHer Food with Faces of Farming & Ranching spokespeople and other farmers and ranchers recruited by USFRA
- >> New York Media Tour/Blogger Dinner with Faces of Farming & Ranching spokespeople
- >> IFIC Science Communications Summit panel participation from Will Gilmer, Faces of Farming & Ranching spokesperson
- >> Antibiotics TweetChat with Chris Chinn, Faces of Farming & Ranching spokesperson
- >> Restaurant Leadership Council panel participation from Bo Stone and Chris Chinn, Faces of Farming & Ranching spokespeople





Personal Connection with Farmers: USFRA Brings Farmers' Stories to Life

In 2013, USFRA engaged thousands of farmers and ranchers throughout the country to share their stories and lead the conversation about food production.

FACES OF FARMING & RANCHING:

At Food Dialogues: New York, USFRA announced nine finalists of the Faces of Farming & Ranching program, aimed at putting a face on American agriculture and giving farmers a platform to share their stories. On January 22, the winners – Chris Chinn, Katie Pratt, Will Gilmer and Bo Stone, all farmers representing different commodities – were announced via live stream on FoodDialogues.com. The four winners now act as national spokespeople for agriculture and have participated in many panel discussions and media activities to share their stories of continuous improvement on their farms.



➤ **Chris Chinn** and her husband, Kevin, are fifth generation farmers – farming with his parents and brother. They raise hogs, cattle, hay and row crops on their farm. It is a 1,500 sow farrow-to-finish farm and 60-head cow-calf operation.



➤ **Will Gilmer** and his father own and operate a dairy farm, which has been in continuous operation since Will's grandfather established it in the early 1950s. They currently milk 200 Holstein cows and raise their own replacement heifers, while managing 600 acres of land used for pasture and forage production.



➤ **Katie Pratt** and her husband, Andy (a seventh generation farmer), currently farm in partnership with Andy's family. They raise corn, soybeans and seed corn for a regional family-owned company. They welcome tour groups to their farm as part of a family tradition, which started back in the early 1970s.



➤ **Bo Stone** jointly owns P&S Farms with his parents and wife, Missy. They grow 2,300 acres of row crops, raise approximately 10,000 pigs annually and have 60 cows. They also grow two and a half acres of strawberries and four acres of sweet corn to sell at their own roadside market. Bo represents the sixth generation to farm their land.

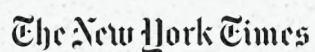
Throughout the year, the winners have served as spokespeople at a variety of food industry and consumer events as well as media opportunities.

A satellite media tour and radio media tour in February 2013 with Faces of Farming & Ranching spokesperson, Katie Pratt, garnered **18 million** impressions.

During a media tour in New York, the Faces of Farming and Ranching spokespeople met with:



Bill Tomson (phone interview)



Stephanie Strom



Jim Grieff and Mary Duenwald



Kelsey Gee (phone interview)

In addition, Katie Pratt and Chris Chinn co-hosted a satellite media tour in August to help parents prepare for back-to-school by learning how food is grown and raised. Coupled with a Radio Media Tour, Katie and Chris conducted interviews for more than **50** broadcast outlets in markets that included Chicago, Boston, Philadelphia, Miami, Phoenix and Atlanta, netting **37 million** impressions.



ANNOUNCING THE JAMES MOLL FILM: FARMLAND

FARMLAND, a feature-length documentary directed by Academy Award®-winning director, James Moll, made with the generous support of USFRA, was announced on March 11, 2013 at the South by Southwest Music Conference and Festival (SXSW). Through personal, emotional and honest storytelling, FARMLAND captures the real lives of the next generation of farmers and ranchers across America. The film will premiere to audiences across the country in the spring of 2014.



MOBILIZING OUR BASE

Since its launch in 2011, USFRA has committed to building an army of prepped and mobilized farmers and ranchers to share their stories and change the national conversation about food production.

- >> 4 national spokespeople
- >> 100+ conversation leaders
- >> 8,500+ farmers and ranchers trained in 22 states



MEDIA RELATIONS PROGRAM: EDITORIAL BOARD OUTREACH AND OPEDS

In the spring of 2013, USFRA created the Antibiotics Working Group to help guide messaging, material development, spokesperson identification and strategy. A panel of experts was assembled to attend media briefings in New York and Washington, D.C. with top tier business media.

- >> Briefings with major media outlets



- >> OpEds



- 12/24/2012, The Wall Street Journal, "A Reality Check for Organic Food Dreamers" **5,545,854** impressions
- 10/16/2012, Minneapolis Star Tribune, "Farmers care, as you do, about the food they produce" **1,320,966** impressions
- 3/19/2013, The Hill, online, "For farmers and ranchers, everyday is 'Ag Day'" **1,214,328** impressions
- 5/3/13, CNN Eatocracy, "Why my hogs are on a healthcare plan" Chris Chinn, author, Faces of Farming & Ranching spokesperson **327,761** impressions
- 8/15/13, CNN Eatocracy, "Farming in a fishbowl" Katie Pratt, author, Faces of Farming & Ranching spokesperson **327,761** impressions

>> Letter to the Editor



— 4/4/13,
New York Times, “Antibiotics,
Farm Animals and You”
Dr. Charles Hofacre
participated in the USFRA
New York media briefings in
April 2013

15,695,175
impressions



ENTERTAINMENT PARTNERSHIP: ANDERSON LIVE

In the fall of 2013, USFRA worked in conjunction with Anderson Live to produce two live segments on the show. The partnership showcased farmers sharing their stories as they toured their farms with consumers.



- >> **4,191,000** broadcast impressions
(two segments and one promo)
- >> **71,569** digital impressions
- >> **5,728,569** total partnership impressions

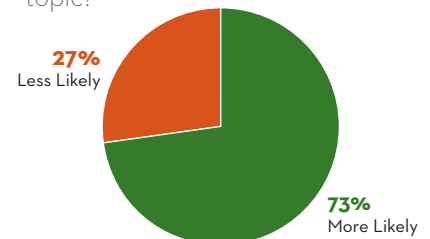


Feedback on Anderson Live Partnership: What the Straight Talk Community Had to Say

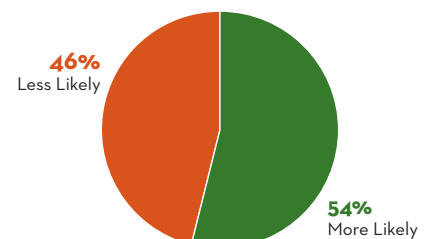
Partnerships like Anderson Live help viewers think more critically about the issues. Examples of comments included:

- >> *I thought this clip was interesting. It was good to hear the information come from a rancher.*
- >> *Well, I do like that the farmer was willing to be interviewed and be viewed by thousands. I think that the young lady should [have] asked more questions regarding the farmers' animals.*
- >> *The farmer seemed to tell it like it is and was truthful. I wonder if all farmers are that truthful or are they telling us what we want to hear instead?*
- >> *My overall reaction is that I liked its honesty. The woman on the farm was hesitant to answer the visitor's questions, but she did answer and gave in-depth answers. I was also shocked that the woman felt okay about eating meat with hormones after her visit.*
- >> *What stood out the most was the farmer admitted that antibiotics and hormones were given to the cows.*
- >> *It was good to see that the farmer wasn't flat out lying saying that she wasn't using hormones, but I wish she would have explained a bit more about it.*

After viewing the Anderson Live clip, are you any more or less likely to want to learn more about this topic?



Has the Anderson Live clip made you think any more critically about your food purchases?



(n=41)



One Voice: USFRA Provides Industry-Leading Research, Messaging and Insights for Our Affiliates and Partners

Through state-of-the-art message testing and groundbreaking research, USFRA set out to help the industry and farmers and ranchers better understand consumer perceptions of transparency in food and food production in 2013.

E.A.S.E. TRAINING

- >> Since 2011, USFRA has visited more than **22** states throughout the U.S. to train more than **8,500** farmers and ranchers in how to lead the conversation about food production. Through role-playing and an in-depth look at USFRA's message testing and research, trainers are providing America's farmers and ranchers with the tools they need to engage in meaningful and impactful conversations about the work they do each day.



TRANSPARENCY RESEARCH

- >> USFRA worked with a leading research firm to conduct research to learn more about transparency, specifically how transparency is defined and what it means to consumers. The research also uncovered direction for the industry on what it means to communicate transparency.
- >> **1,019** Consumer Food Connectors and general consumers responded in May 2013. The proprietary research was revealed to a group of food customers at Food Dialogues: Chicago at Kendall College. The presentation was then followed by a discussion with audience members and a panel of farmers, ranchers, industry experts and customers.

People say they want more information from grocery stores and restaurants

	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%



>> How much information do you feel is made available regarding how food is grown and raised?

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

CONSUMER PERCEPTIONS: QUANTITATIVE RESEARCH

>> Survey of **500** general consumers and **500** Consumer Food Connectors responded in August 2013.

Key Findings:

- >> Overall, **we are doing a good job**. Americans believe their food is safe.
- >> 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.

ONGOING USFRA DIAL TESTING

>> In 2011 and 2012, USFRA worked with a leading research firm on in-depth dial testing to **test new and existing messages** that resonate with **key audiences**. Throughout 2013, results from this research were used in Conversation with E.A.S.E. trainings for farmers and ranchers, as well as in industry presentations to outline USFRA's core messaging.

STRAIGHT TALK ON FOOD AND AG COMMUNITY: COMMUNISPACE

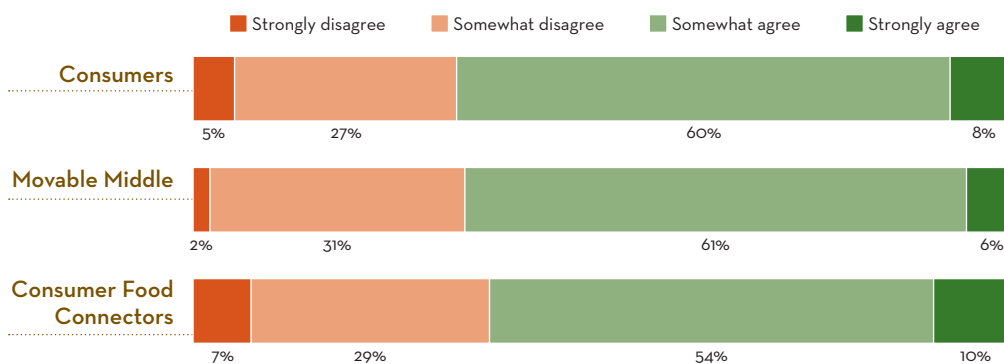
>> In April of 2013, USFRA developed a secure, online community of **300** Consumer Food Connectors to use as a springboard for testing new content and ideas surrounding USFRA programming.

CONSUMERS ARE LISTENING TO FARMERS AND RANCHERS

Based on a new 2013 benchmark survey, Consumers and Consumer Food Connectors both generally agree that farmers and ranchers are committed to sharing more information with consumers about how food is grown and raised.



Farmers and ranchers in the U.S. are committed to sharing more information than previously with consumers about how food is grown and raised.



Key Outcomes

USFRA CONTENT IS IMPROVING TRUST

In 2013, USFRA created the **Straight Talk on Food and Ag Community**, a private, online forum of **300** Consumer Food Connectors from a variety of backgrounds – chefs, dietitians, farmers, researchers, nurses, educators and marketers – to provide timely feedback and opinions on a range of topics. The group is a perfect sounding board for testing new content and ideas.

After exposure to USFRA content, Consumer Food Connectors are more likely to believe the U.S. is heading in the right direction in the way farmers and ranchers grow and raise our food.

Overall, would you say the U.S. is heading in the right direction or off on the wrong track in the way our farmers and ranchers grow and raise our food?

Pre-exposure (n=45)



Post-exposure (n=34)

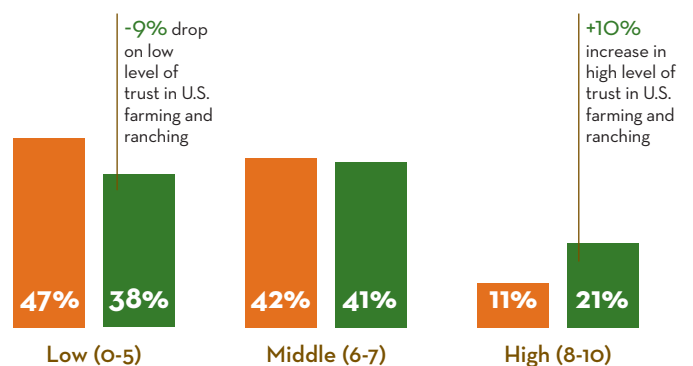


Wrong Direction Right Direction

On a scale of 0 to 10, how would you rate your trust in farming and ranching in the U.S.?

Pre-exposure (n=45)

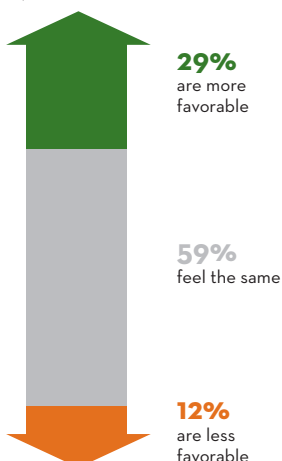
Post-exposure (n=34)



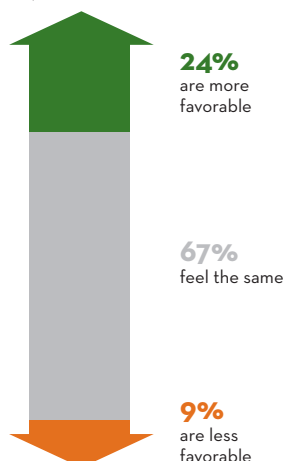
Consumer Food Connectors Exposed to USFRA Content Over Six Months Show Improved Trust on Key Issues

According to Straight Talk on Food and Ag Community feedback, after nearly six months of interacting and experiencing USFRA content, there is a **visible change in favorability ratings** on key topics like antibiotics, conventional agriculture and biotechnology.

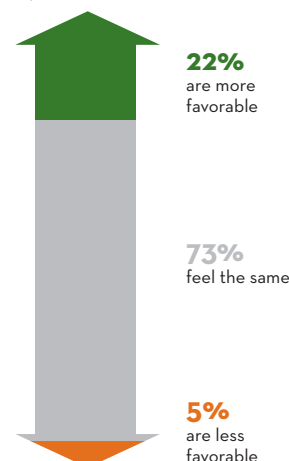
Use of antibiotics in animals (n=131)



Conventional agriculture (n=132)



Biotechnology (n=131)



2014 KEY ACTIVITIES



FARMLAND Feature-length Documentary

USFRA will continue to plan activities surrounding the release of **FARMLAND**, a feature-length documentary directed by Academy Award®-winning filmmaker James Moll. Activities include:

- >> **Spring 2014:** National red carpet premieres in New York and Los Angeles
- >> **Spring/Summer 2014:** Regional screenings for public and private audiences throughout the U.S. and film available as a digital download on demand
- >> **Summer/Fall 2014:** Engagement with college-age students via partnerships with FFA and on-campus screenings



Food Dialogues Panel Discussions

USFRA's signature event series Food Dialogues will continue in 2014 with events planned throughout the year.

- >> **Food Dialogues: Boston** – Farm Size: Does it Really Matter?
A panel discussion on farm size, ownership and sustainability.
- >> Early planning in beginning for a **Food Dialogues** discussion in spring/summer 2014 geared towards **customers**.
- >> Additional **regional panel discussions** in affiliate states and agricultural trade shows/events will continue throughout the year.



Convening on Issues

USFRA will continue to focus on tough issues that erode trust in agriculture, including **antibiotics** and **GMOs** with potential to do more around topics that we know cause concerns among the consumer and influencer audiences.



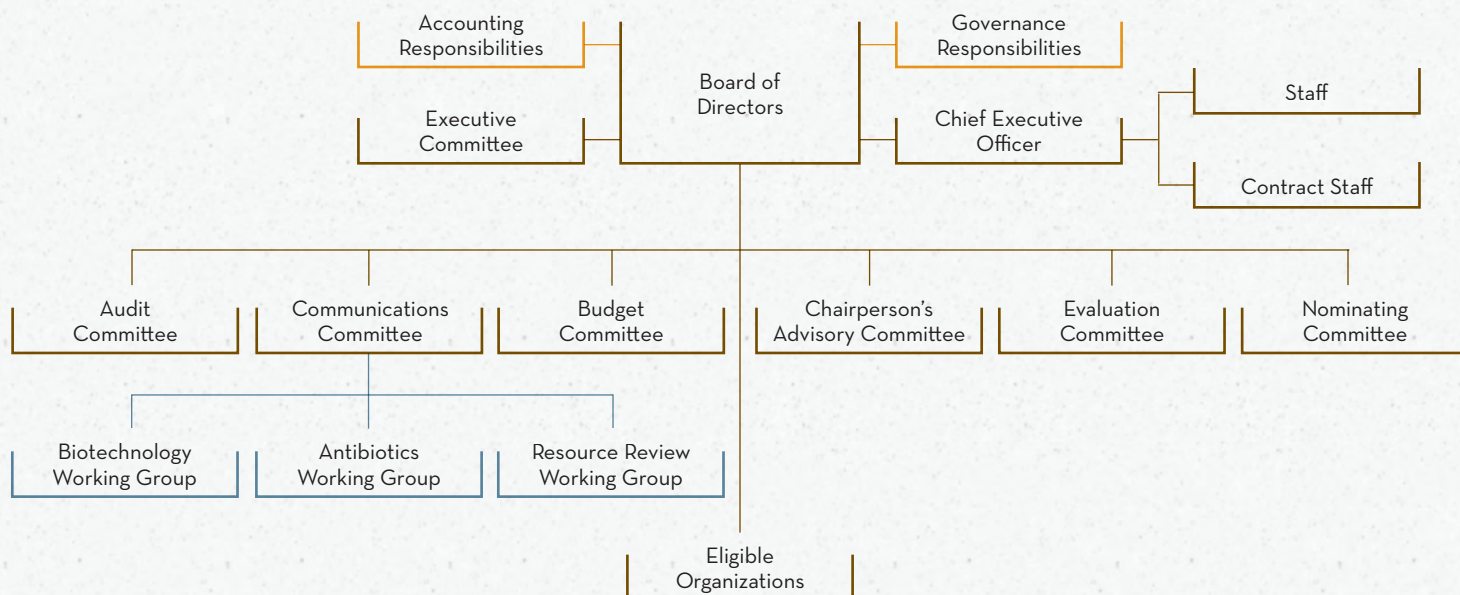
Increased Earned Media Activities

Continued utilization of **USFRA spokespeople** and **subject matter experts** on national media outreach activities will continue in 2014.

GOVERNANCE STRUCTURE



USFRA welcomes support from agricultural organizations of all shapes and sizes – no matter how big or small – as well as individuals to join the effort to lead a two-way dialogue with Americans about their food. We are a coalition of 80 national, regional and state agriculture groups and our partners, including agribusiness companies.



COMMITTEE STRUCTURE AND RESPONSIBILITIES

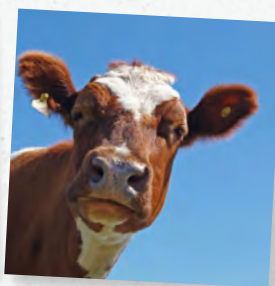
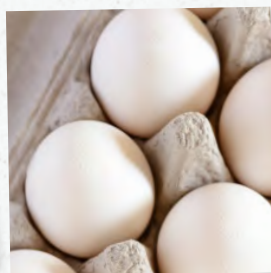
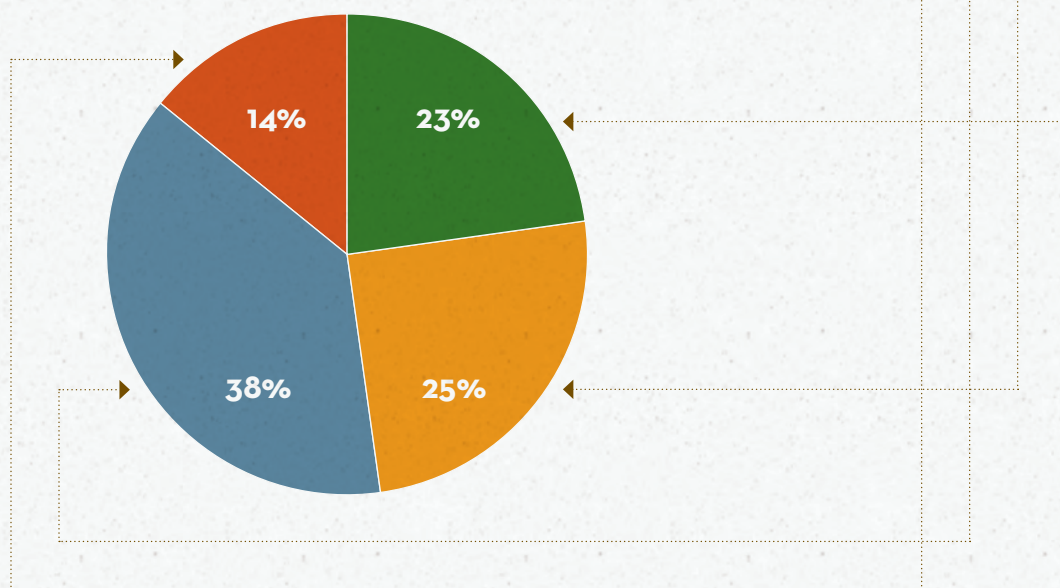
- >> **Audit Committee:** Responsible for recommending auditors and overseeing the audit process
- >> **Communications Committee:** Responsible for developing and implementing USFRA communications strategy and projects
- >> **Budget Committee:** Responsible for developing the USFRA budget
- >> **Chairperson's Advisory Committee:** Responsible for the recruitment of Industry Partners
- >> **Evaluation Committee:** Responsible for evaluating USFRA progress towards goals
- >> **Nominating Committee:** Responsible for the nomination of the Executive Committee
- >> **Working Groups:** Enables Affiliates and Industry Partners to participate in the USFRA communications development process. Working Groups are responsible for providing input and recommendations to the Communications Committee for approval.
- >> **Eligible Organizations:** Those organizations meeting the financial requirements for participation as a partner

2013 OVERVIEW BY STRATEGIC OBJECTIVES



STRATEGIC OBJECTIVE	SPENDING ESTIMATE*
Convening Around Issues	\$ 2,516,364
Accessible Information on Key Topics	\$ 2,345,369
Telling Our Story	\$ 3,810,599
Actionable Research and Feedback	\$ 1,358,119

*Includes National Checkoff, State Checkoff and Non-Checkoff budgets.



Thanks to the generous support of our farmer and rancher affiliates and industry partners, USFRA has been able to accomplish a number of key initiatives during the past year. Many more voices are needed to continue to make this movement successful. For more information about how to get involved with USFRA, call **636-449-5086** or email **info@FoodDialogues.com**.

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.



16020 Swingley Ridge Road, Suite 300, Chesterfield, MO 63017
636-449-5086 | info@FoodDialogues.com
www.FoodDialogues.com

This Stakeholder Annual Report was funded wholly or partially by one or more Checkoff programs.

©2013 USFRA