



Project Snapshot: Consumer Environmental Tracking Study



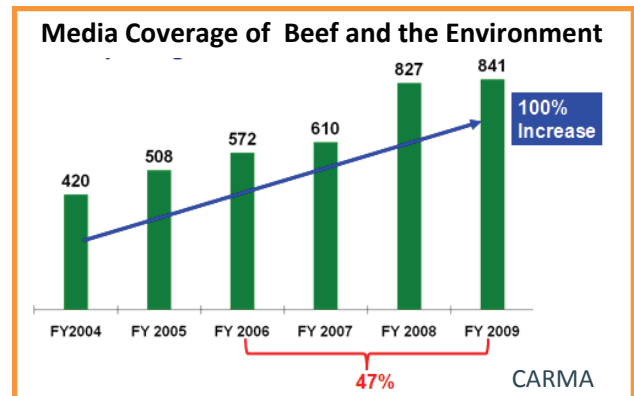
Date: January 12, 2010

Background

A United Nations Food and Agriculture Organization (FAO) report (titled *Livestock's Long Shadow*) released in November 2006 claimed that, on a global basis, livestock production generates 18 percent of the world's greenhouse gas (GHG) emissions – as measured in CO² equivalent. This, the report claimed, was more than the entire transportation sector.

Although EPA data clearly show that the entire U.S. agriculture sector is directly responsible for only 6 percent of annual U.S. GHG emissions and livestock production for less than 3 percent, the media has widely distributed the FAO report claim and called for Americans to reduce their meat – and specifically beef – consumption to help save the planet.

Media coverage of beef and the environment has exploded since 2004. From 2004 to 2006 annual beef environmental coverage increased by slightly more than a third (36%). However, from 2006 through 2009, propelled by activists pushing the 18 percent claim, coverage further increased by almost one half (47%) and has doubled since 2004.



Objective

Because of the high media, public and policy attention to global warming, and specific claims about livestock's contribution to GHG emissions, it is important for industry issues management to determine if consumer attitudes are being affected by claims that reducing meat/beef consumption is an important step to reducing global warming. This snapshot compares findings from surveys conducted in December 2007, 2008 and 2009 with specific presentation of data from the 2009 survey. The independent surveys were conducted by international research firm IPSOS Public Affairs and are designed to track consumer attitudes about global warming and livestock production.

Methodology

A sample of more than 1,900 beef-eating adults completed each online survey. The samples were drawn from a large panel of consumers and weighted to be representative of the total U.S. population.

Findings

Despite heavy media coverage over the past few years, Americans are not highly familiar with some of the environmental concepts being covered. In the 2009 survey, majorities say they know at least a fair amount about global warming (56%) and climate change (54%), but only 44 percent say they know at least a fair amount about GHG emissions and slightly more than a third (35%) say they are familiar with carbon footprint. More than one in ten (11%) say they have never heard of carbon footprint, almost three times more than have never heard of GHG emissions (4%). However, in 2007 a quarter of consumers said they had never heard of carbon footprint.

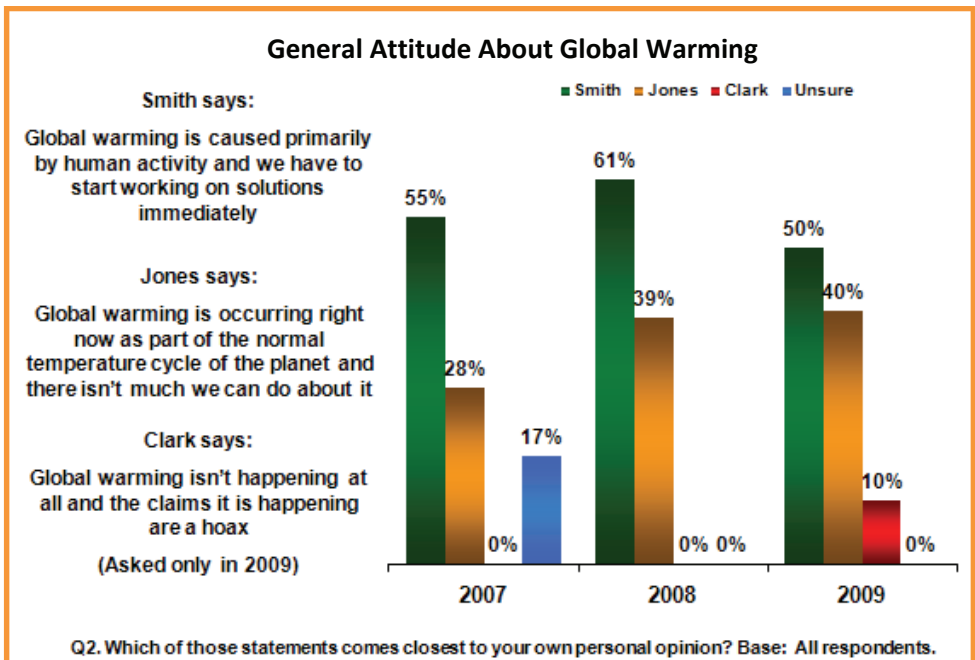
Consumers are divided over whether global warming is a natural phenomenon or is the result of human activity. The proportion of Americans who believe global warming is part of the normal temperature cycle has held steady over the past year, and the proportion who see global warming as caused by human activity has decreased, so only a bare majority (50%) now support this view. One in ten believes that global warming is not happening at all and that it is a hoax. Women (54%), young adults age 18-34 (56%) and college graduates (56%) are more likely to view global warming as being caused by human activity.

In 2009, more consumers (44%) say they are reducing or are likely to reduce beef consumption to cut GHG emissions than believe reducing beef consumption is an important step to take (31%). In addition, when asked how reducing beef consumption would help reduce GHG emissions, more than a third (36%) say they aren't sure and another 8 percent say they don't think it would reduce emissions. Because other studies have shown nutrition and health to be the major attitudinal barrier to beef consumption, this is a possible indication



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that beef consumers have health concerns in mind when discussing cut-backs rather than strictly environmental reasons. In that regard, the concern is that the global warming claims may represent a tipping point for some consumers. Studies indicate that consumers are increasingly concerned about sustainability when making food choices and a belief that cattle contribute to global warming, when added to nutrition and safety concerns, may tip some consumers away from choosing beef.



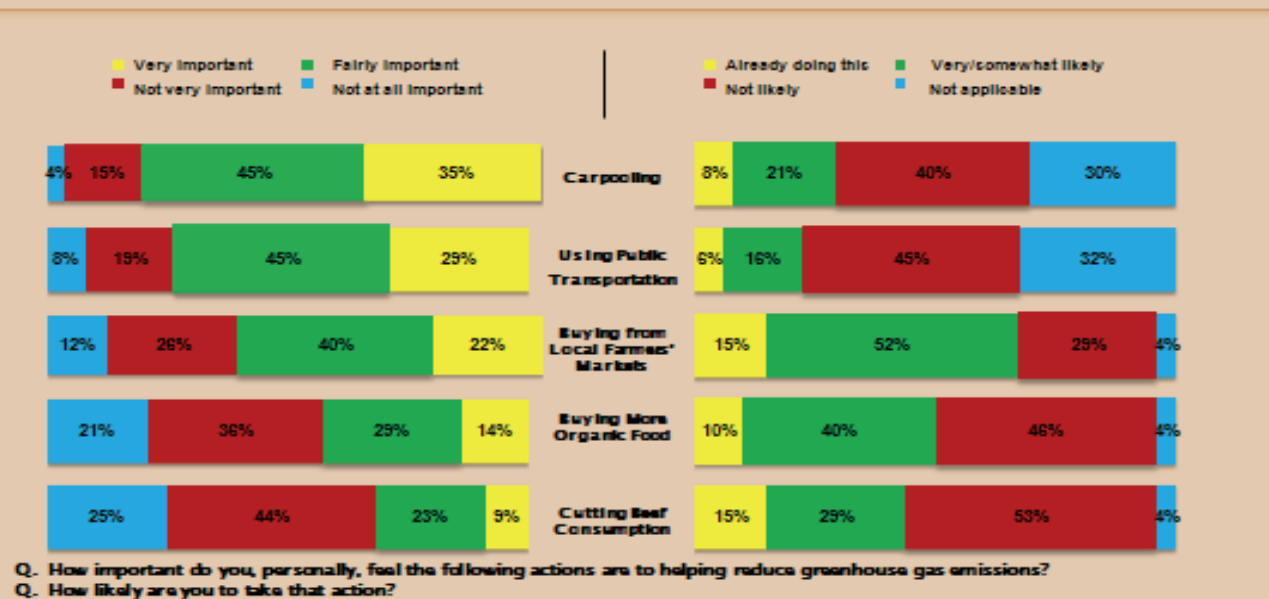
Key Points

- Media coverage of beef and the environment has doubled in the past five years, especially coverage calling for reduction in beef consumption to prevent global warming.
- This media coverage is not diminishing and appears to be growing more strident as increasing numbers of activists, policy makers, celebrities, food influencers and non-governmental organizations amplify the call for consumers to reduce beef consumption for environmental reasons.
- 44 percent of U.S. consumers say they have cut beef consumption or are likely to do so to help reduce GHG emissions

Actions To Reduce Greenhouse Gas Emissions – Importance vs. Likelihood

– Many of the actions viewed as most important are also those where individuals are least likely to take action such as carpooling and using public transportation.

– Buying from farmers' markets is about even in terms of importance and likelihood. Buying more organic food and cutting beef consumption are rated higher on likelihood than importance, indicating other factors than the environment for likelihood of taking action.



Next Steps

The Consumer Environmental Tracking Study findings are used in the sustainability reputation management program managed by the Issues & Reputation Management team at NCBA. Survey data is used to support checkoff environmental issue response and influencer and consumer communications. An assessment of the carbon footprint of producing a pound of beef is in process with data expected in late spring 2010. Additional 2010 research is planned to better understand consumers' perceptions of sustainability and how that affects food choices.