2014 Millennial Perceptions of Beef Production
Background

Consumers continue to have concerns about the beef production process.

One central theme is related to the feedyard, or “factory farm.”

With this in mind, a deeper understanding of these concerns and how to effectively address them is needed.

Because millennials will drive beef consumption for the next several decades, it is important to understand how this generation responds to information and outreach related to these perceptions about beef production.
Desired Research Outcomes

1. Identify the most effective means of positively (proactively or otherwise) communicating to Millennials about the feedyard, and dispelling myths about “factory farming”.

2. Assist and support the development of a communications strategy to more broadly and effectively address this industry challenge.
Understand and Explore

Qualitative – Millennials Age 20-34; N=~30

Forum 1
w/o June 2

- Perceptions about meat production, feedlots and factory farming
- Sources and credibility
- Beef production facts and reaction

Forum 2
w/o June 9

- Where factoring farming fits
- Exposure to beef production stimuli
- Blogs, articles, videos

Forum 3
w/o June 16

- Gauge perception shifts
- Identify most effective stimuli
Understand
Initial reaction to meat production processes are mostly negative outside of niche markets (grass-fed, organic).

**QUAL**

1.1 Earlier you were asked to find any pictures, videos, or messages that you felt in some way captured how you personally feel about the meat production process in America today. Please take the time now to post what you found and tell me why you feel each item captures the process.
What does the term factory farming mean?

<table>
<thead>
<tr>
<th>What does the term factory farming mean?</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>INDUSTRIALIZED PRODUCTION</td>
<td>47%</td>
</tr>
<tr>
<td>NEGATIVE LIVING CONDITIONS/ANIMAL TREATMENT</td>
<td>25%</td>
</tr>
<tr>
<td>SIZE</td>
<td>20%</td>
</tr>
<tr>
<td>CATTLE LIFE CYCLE</td>
<td>11%</td>
</tr>
<tr>
<td>HORMONES/GMOs</td>
<td>4%</td>
</tr>
</tbody>
</table>

Millennials associate factory farming with factory-like atmospheres, inhumane treatment of animals, and sheer size of a plant or operation.
Millennials tend to associate the entire beef production process with factory farming.

Which part(s) of the production process do you associate with factory farming?

- The entire process: 44%
- Packaging/Processing/Slaughter: 27%
- Feedyard/Feedlot: 24%
- Livestock auction: 13%
- As soon as a calf is born: 12%
- After a calf weans from the: 11%
- None of the process: 5%

They also believe at least a moderate amount of beef produced in the US comes from Factory Farms. Far more than they attribute to small or family farms.

QUANT
Q265. Please indicate how much of the beef that is sold in America you think is produced by factory farms using a scale of 1 to 10 where 1 is none of the beef and 10 is all of the beef.
Top Concerns about Beef Production

Inhumane treatment, crowded conditions and hormone use are most concerning to Millennials.

I am concerned about what type of food is given to the animals, if they are locked in cages, and if they have been given growth hormones.

I just want to make sure the cattle are brought up with respect, they aren’t mistreated, and their death is quick as possible.

Confirmed in QUANT: Animal abuse/inhumane treatment, disease, GMOs and hormone use are the most concerning issues.

QUAL – 7.2 Looking at the same list, please select the top 3 items that are MOST concerning to you, in order of most to least concerning.
What we learned in the “Understand” stage and what to pursue.

There is an undeniable lack of knowledge about beef production among Millennials
• Explore viable means of educating Millennials in an effort to debunk myths

Niche markets (grass-fed, organic) seem to be excluded from the negative connotation associated with beef production
• Educate Millennials to help them understand that all cattle are treated well

Factory Farming is a concern for the beef industry particularly as it pertains to inhumane treatment of animals, disease, and hormones
• Isolate messaging to debunk concerns and delineate whether a proactive approach can be taken

Factory Farming is not wholly associated with feed yards, it is a total systems issue
• Develop total system communication approaches to help mitigate negate connotations
Explore
Emotions associated with Factory Farming...

Millennials express high levels of **suspicion**, **worry**, and **uncertainty** about factory farming; positive emotions are very low.

<table>
<thead>
<tr>
<th>Emotions strongly associated with factory farming</th>
<th>Emotions least associated with factory farming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspicious</td>
<td>Hopeful</td>
</tr>
<tr>
<td>65%</td>
<td>20%</td>
</tr>
<tr>
<td>Worried</td>
<td>Accepting</td>
</tr>
<tr>
<td>61%</td>
<td>23%</td>
</tr>
<tr>
<td>Uncertain</td>
<td>Trusting</td>
</tr>
<tr>
<td>60%</td>
<td>16%</td>
</tr>
</tbody>
</table>

**QUANT - BASE: ALL QUALIFIED RESPONDENTS**

Q260. Please indicate whether each word describes your personal feelings about factory farming.
Initial Exposure to Stimuli

Millennials were exposed to a variety of stimuli intended to educate and inform them about beef production and their related concerns.

- Video (6)
- Blogs (7)
- Articles (4)
- Graphics (1)
The initial stimuli had a positive impact; in fact, many even claimed to have a more positive view on the beef production process from simply hearing a brief description of the beef production process.

Thinking about everything we have gone over, has this had an impact on any of the following:

<table>
<thead>
<tr>
<th></th>
<th>Top 2 Box*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your perception of the beef production process</td>
<td>24</td>
</tr>
<tr>
<td>Your level of comfort in eating beef</td>
<td>21</td>
</tr>
<tr>
<td>Your likelihood to purchase beef at the grocery store</td>
<td>21</td>
</tr>
<tr>
<td>The amount you follow or seek information on factory farms</td>
<td>20</td>
</tr>
<tr>
<td>The amount you follow or seek information about the beef production process</td>
<td>20</td>
</tr>
</tbody>
</table>

*Qual. Numbers refer to participants; percentages not used due to small sample size.
Some myth's about concerns are easily debunked with simple facts, others are in need of additional information.

**Antibiotics v1**- Antibiotics in cattle are used carefully by farmers and ranchers in cooperation with veterinarians and used as selectively as possible to treat, control or prevent disease.

**Antibiotics v2**- Over the next three years, FDA will be phasing out the use of medically important antibiotics to promote growth in livestock, while phasing in even more veterinary oversight for use of these medically important antibiotics for disease treatment, control or prevention in livestock.

**Hormones** - Farmers and ranchers have been safely using growth hormones in cattle since the 1950s. Studies during this time frame have repeatedly shown they pose no risk to consumers.

**Inhumane Treatment** - Feedyard cattle live in pens that allow ample room to move around, with access to clean water, a balanced diet and veterinary care. The cattle often stand close together in these pens because that is their natural herding instinct.

**Cattle Diet** - Cattle can get the nutrients they need from eating a wide range of plants, including a variety of grains and grasses. While at a feedyard, for example, cattle are fed a combination of grain and hay formulated by a professional nutritionist to ensure a well-balanced and nutritious diet.

**GMO** - Crops from biotechnology seeds are studied extensively to make sure they are safe for people, animals and the environment before they reach the farm or ranch.
What we learned in the “Explore” stage that supported video development.

Millennials have negative emotions towards factory farming
• Develop stimuli that alleviates negative emotions

Respondents trust a variety of third party sources
• Consider stimuli that may eventually be created from the perspective of Vets, Academics, or receive the FDA and USDA stamp of approval

Millennials are not going to go out of their way to find out about beef production – bring information to them
• Evaluate avenues where production information can be made available through search engines, news forums, blogs, and documentaries

Stimuli that addresses the total production system with strong visual support (video) perform best
• Develop and evaluate engaging stimuli that educates respondents on the beef lifecycle as well as a possible ‘myth’ type of stimuli that addresses many top concerns at once
Insights from the “Explore” stage we learned while developing video.

When showing a feedyard focus on total pen space rather than crowded feed bunks.

Incorporate all the people involved in the process including family and other credible parties when possible (Vets).

Show what is actually happening throughout the process (show hormone implant, food when talking GMO’s, space in pens for room to move, etc.).

While respondents are looking for transparency and show a lack of knowledge in beef production, do not draw a tremendous amount of attention to the slaughter process or final product “beef on the plate.”

Try to tell each story as succinctly as possible without losing sight of the intricacies of each stage or concern that is being addressed.
Determine
Developed Stimuli to Test

Over 1,000 Millennials were exposed to a variety of stimuli that were created from learnings to date.

**Myth Stimuli** – Addresses GMO, hormone and antibiotic concerns

**Production Lifecycle Stimuli** – Shows how beef gets from pasture to plate

**Myth Stimuli**
- Video – Production Cycle – Narrator
- Video – Debunking Myths – Producer
- Blog - Grain Fed vs. Grass Fed – Recent Hale Feedyard Tour, Texas for Bloggers and Nutritionist

**Lifecycle Stimuli**
- Article – Raising Cattle in the United States: Myths About Factory Farming
- Article – Beef Production Lifecycle

Millennials were exposed monadically to videos – leading to 200 respondents viewing each stimuli.
Stimuli Received Very Positive Feedback...

Perceptions of all of the stimuli come across strong, though the Production Narrator Video was perceived most positively.

<table>
<thead>
<tr>
<th>% Strongly/Somewhat Agree</th>
<th>Myths Video</th>
<th>Production Narrator Video</th>
<th>Blog Article</th>
<th>Beef Production Article</th>
<th>Cattle Myths Article</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is easy to understand</td>
<td>77%</td>
<td>85%</td>
<td>73%</td>
<td>73%</td>
<td>67%</td>
</tr>
<tr>
<td>This told me something new about beef production</td>
<td>66%</td>
<td>72%</td>
<td>68%</td>
<td>72%</td>
<td>66%</td>
</tr>
<tr>
<td>This is relevant to me</td>
<td>65%</td>
<td>73%</td>
<td>60%</td>
<td>68%</td>
<td>63%</td>
</tr>
<tr>
<td>This has content that is believable</td>
<td>61%</td>
<td>72%</td>
<td>64%</td>
<td>66%</td>
<td>56%</td>
</tr>
<tr>
<td>This is credible</td>
<td>56%</td>
<td>63%</td>
<td>52%</td>
<td>52%</td>
<td>48%</td>
</tr>
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</table>
The beef lifecycle elicits higher order benefits...

The Production Narrator Video (followed closely by the production article) also shows potential to take consumers a step further than the other stimuli.

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<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>This makes me feel more comfortable with the beef production process</td>
<td>55%</td>
<td>66%</td>
<td>55%</td>
<td>62%</td>
<td>51%</td>
</tr>
<tr>
<td>This is something I would share with other people</td>
<td>55%</td>
<td>59%</td>
<td>53%</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>This makes me believe that the beef industry is dedicated to animal health and well being</td>
<td>53%</td>
<td>63%</td>
<td>52%</td>
<td>60%</td>
<td>46%</td>
</tr>
<tr>
<td>This makes me want to eat beef more frequently</td>
<td>37%</td>
<td>47%</td>
<td>32%</td>
<td>33%</td>
<td>29%</td>
</tr>
</tbody>
</table>
What we learned in the “Determine” stage.

While all positive, addressing the total production system generates the most potential to mitigate negative perceptions of factory farming (Production Narrator Video performs best).

The Myth stimuli addresses top areas of concern; however, the stimuli do not have as much halo effect on other areas (perceptions, emotions) as a more holistic/total production lifecycle approach does.

Bloggers (particularly those who are very visual in posts and have first hand experience) are a viable option to address such things as inhumane treatment, what cattle eat, etc., but a more credible source (e.g. Vet, USDA) is needed when speaking to specific concerns such as hormones or GMOs.