

Consumer Beef Index Research

The national Consumer Beef Index (CBI) is conducted through the the Beef Checkoff Program and is designed to track changes in consumers' perceptions of, and demand for, beef relative to other meat proteins; monitor consumer impressions of beef that could be attributed to the industry's communications and advertising efforts; and monitor the areas of relative strength and potential vulnerability for beef sales. CBI tracking surveys have been conducted semi-annually for more than six years among 18-65 year old U.S. consumers. FBC voted to delve into the research findings from Florida to better understand our consumers, their buying habits and opinions. FBC pinpointed four regions within the state and discovered strengths and vulnerabilities for beef within each area. The four metropolitan groups were Northern (including Jacksonville, Gainesville, Tallahassee and Panama City), Orlando, Tampa and Southeast (including Miami and West Palm Beach).

Consumer Beef Index Results Summary Statewide

- ▶ Florida residents are moderate beef eaters and enjoy home cooking and grilling.
- ▶ More than other U.S. residents, they want a main dish protein that is a smart choice, something they feel comfortable preparing and feel good about serving and, most importantly, tastes great.
- ▶ They consider the beef they buy at retail consistently tender, great for grilling and a symbol of "the good life."
- ▶ Perceptions of beef are improving statewide, particularly concerning fresh beef's nutritional profile – being a good balance of taste and nutrition, providing essential vitamins and minerals and being a smart choice.
- ▶ Florida residents are hearing less bad news about beef's health and safety than they used to, as well.

Overall, the CBI results showed that Floridians do enjoy beef and there are considerable opportunities for promoting and educating about beef within specific regions of Florida.

Florida Dietitian's Conference

The opportunity to target the Florida Academy of Nutrition and Dietetics Conference attendees allowed the Florida Beef Council (FBC) to directly reach an amazing audience of nutritionists, dietitians, university professors, and other health and nutrition influencers. FBC is known for its science-based resources that these influencers love to provide their clients. FBC is an annual sponsor of a seminar during the conference thanks to a partnership with the checkoff-funded, which Nutrition Seminar Program, pays all costs associated with bringing a renowned speaker to the event.

This year's presenter was Laurie Forster, who is known as The Wine Coach. Laurie has an easy-to-understand approach to explaining food and wine pairings. FBC capitalized on the popularity of the event by providing beef tastings to accompany the wine samples during the presentation. An Asian beef salad was complemented by a white wine, and beef and couscous stuffed baby bell peppers paired beautifully with a red wine. Both recipes were healthy and nutritious and very well received by the seminar attendees.

FBC was also able to provide additional educational materials to the seminar participants at no cost, thanks to the national checkoff participation. The Conference also allowed FBC to network with industry professionals and create relationships with people who have direct contact with clients needing advice about proper health and nutrition. Our primary goal at this conference was to showcase the value of beef in a healthy diet.

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2013 FLORIDA BEEF COUNCIL FINANCIAL REPORT

REVENUE	
Gross Assessments Collected.....	\$672,207
Federation Funding.....	10,825
Non Checkoff.....	837
Total.....	\$683,869
DISBURSEMENTS	
Cattlemen's Beef Board.....	358,536
NCBA Checkoff Division.....	40,000
Promotion.....	119,462
Research.....	439
Consumer Information.....	82,001
Producer Communications.....	28,619
Federation Funding.....	10,825
Collections Compliance.....	1,700
Administration.....	50,773
Other.....	1,873
Total.....	\$674,289
Net.....	\$9,580



Florida Beef Month

By proclamation of Governor Rick Scott, May 2013 was Florida Beef Month! While every month is beef month at the FBC, this year we focused on clear objectives to raise awareness about beef, touting its versatility and affordability during the month of May. Press releases were distributed to key media across the state highlighting the Consumer Beef Index research results and Florida consumer preferences for beef.



In total, FBC received 359 hits through print and online media, with 123 million unique visitors and 485,000 print circulation. FBC also worked with the Florida Farm Bureau feature beef in the Florida Agriculture May publication. There were multiple articles about beef, the beef industry and its value to Florida consumers. FBC was also interviewed

by a Tampa Bay Times reporter about Florida Beef Month, the Consumer Beef Index research results and new uniform retail labels. Finally, FBC worked with the Cape Coral/Ft. Myers Fox affiliate for a cooking show on "Morning Blend" to kick off Memorial Day grilling. Topics covered during the show included Florida Beef Month, Florida cattle information, the new labels and the Consumer Beef Index research findings.



Florida Beef Farm to Fork Tour

FBC, with funding by the Federation of State Beef Councils Federation Initiative Fund, hosted the first Florida Beef Farm to Fork Tour. Forty-five influencers, including media, chefs, retail operators, and educators, attended the Tour Oct. 4-5, 2013. The tour included stops at University of Florida Department of Animal Sciences and Meat Processing Center, a purebred operation, a stocker operation, a commercial cow/calf and timber farm, and a feedlot. Guests were asked to participate in pre- and post-tour surveys to

gauge any shifts in opinions concerning farming and ranching, the raising of beef cattle and all of the technologies used in cattle production. Post-tour survey results showed significant improvement in opinion of cattle farmers and ranchers, as well as overall positive sentiment toward the beef industry.

One of the tour guests, Tommie Smothers, Senior Sourcing Specialist, Walt Disney Parks and Resorts, summarized his experience on the tour:



"The Florida Beef Farm-to-Fork Tour was an outstanding event! The two-day bus tour across the North Central Florida cattle country was well-planned and achieved a very important objective – the opportunity

to educate a diverse group of food industry professionals to see first-hand with 'feet-on-the-ground,' the current industry production methodology, standards, sustainability practices, and 21st century technology tools embedded within Florida's cattle industry; while simultaneously grounding the participants in the rich history of cattle ranching and farming crops of all types within our state. An added bonus of the tour was having Cliff Coddington, Chairman of the Florida Beef Council, on the bus to field and answer questions in a very personal and meaningful way.

"The tour highlighted the important work being carried out by Florida's families of generational cattlemen and cattlemen to produce healthy and sustainable high-quality cattle, bred to enter the food supply chain for the purpose of feeding our great nation and the world. Their attention to detail in caring for and tending their animals and pasture lands exemplify their commitment to preserve the land and its natural resources for future generations yet to come.

"I am hopeful and optimistic that funding for future Farm-to-Fork Tours like this will continue in the future because it encourages the needed connectivity between the food industry and the cattle producing families. Tours such as this ignite the passion of those in the food industry when they see, first-hand, that these family ranchers are dedicated stewards of the land entrusted to them, on which they nurture and maintain the health and well-being of their livestock herds demonstrated by the sustainable practices they employ."

Dear Fellow Beef Producers

Is the Federation of State Beef Councils still relevant after 50 years? In my opinion, it is. Beef producers today want as much input as possible into how their dollars are spent.

Thanks to forward-thinking producer leaders almost three decades ago, the mandatory Beef Checkoff Program had as part of its framework then-existing and to-be-created beef councils at the state level, which would collect the \$1-per-head mandatory checkoff and help populate important direction-establishing and funding committees.

Many of those states had already joined together as a Federation to share expenses for common needs, such as Information Technology, design services, planning guidance and communications. By not duplicating costs from state to state, and joining in a common vision and message, councils extend checkoff programs in the state and assure that producers throughout the country are getting the most for their checkoff dollar. Relevant? Absolutely. The Federation of State Beef Councils is a mechanism for grassroots input and influence.

Yours truly,



Richard Gebhart, Chair
Federation of State Beef Councils
Beef Producer, Claremore, Okla.



Fresh Strategies for a Changing Beef Landscape

Because of grassroots producer leadership, the beef industry is positioned to capitalize on future changes in the beef marketplace. Committee restructuring, which parallels the industry's Long Range Plan, was completed this past year to provide the Cattlemen's Beef Board and the Federation of State Beef Councils a better focus on industry goals. Following are some national and international beef checkoff efforts that reflect that plan:

Solving the Millennial Dilemma

Through checkoff-funded research, we know consumers born in the 1980s and 1990s – sometimes called millennials – enjoy beef. But they have some concerns about preparation, nutrition and convenience. Now the question becomes, just how do we turn them into long term beef lovers?

Through a new checkoff-funded retail campaign, with additional support from the Federation and individual state beef councils, that question is being addressed.

The checkoff-funded Convenient Fresh Beef project explores a way to develop an easy-to-prepare fresh beef product at retail stores, make it appealing and create the education and training to make it successful.



Convenient Fresh Beef products include the beef, seasonings and instructions in an attractive sleeve-wrapped tray, prepared in the meat department at the grocery store or brought in as a case ready product. A photo of the finished dish is on the front of the sleeve; from 1-3 recipes are printed on the back.

The items are convenient and provide shoppers options. They

address a millennial's lack of cooking skills and desire for a restaurant experience, and meet the needs of families looking for shortcuts on busy week nights. In addition, they meet mature consumers' desire for easy home-made foods that feed two and provide leftovers.

The test program is being conducted in the Midwest at Price Cutter stores, which have the in-store capabilities to produce the kits and have provided significant support for testing. Additional support for implementation has been provided by individual state beef councils.

Consumer research, post implementation to document interest and sell the programs to other stores, as well as point-of-sale materials, demonstrations and training, and initial spice inventory were made possible through national beef checkoff funds.



Campaign Sizzles with New Voice

New "Beef. It's What's For Dinner." consumer advertising premiered in 2013, bringing the recognizable tagline to both older millennials and Gen-Xers. It features sizzling beef recipes, juicy details about essential nutrients and the voice of one of Hollywood's most promising new talents. The new "Above All Else" campaign reaches out to those who care about food and nutrition.

While keeping many brand mainstays, such as Aaron Copeland's "Rodeo" music, the new beef campaign uses Garrett Hedlund's voice in radio spots. Garrett personally represents healthful living, and his strong, warm voice is perfect for provoking a new understanding about beef.

Research has shown that 45 percent of the target demographic said they would choose beef more often if they knew about

how its nutrients compared to chicken. The new campaign helps set the record straight about beef's essential nutrients in an engaging and educational way.

In addition to traditional print placements, the campaign appears across a wide range of digital platforms, such as 22 tablet versions, online radio stations (e.g., Pandora), video websites (e.g., Hulu), social networking sites (e.g., Facebook) and popular recipe websites (e.g., AllRecipes.com).

State Beef Councils are extending the campaign through print, radio, digital, in-person promotions, sporting events, outdoor advertising and more.



Boosting Beef Internationally

The Beef Checkoff Program assisted as U.S. beef and beef variety meat exports performed very well in 2013. Through

July, exports were 9 percent ahead of last year's record pace in terms of value, at \$3.45 billion. This translates into great returns for producers, as export value equated to nearly \$235 per head of fed slaughter – an increase of 11 percent over last year.

Through international marketing programs conducted by the U.S. Meat Export Federation, the Beef Checkoff Program is working aggressively to increase export opportunities for U.S. beef. For instance, with recently expanded access in Japan the checkoff helped attract new buyers to U.S. beef and expanded the range of cuts available, allowing Japan to reclaim its position as the No. 1 destination for U.S. beef exports. Other Asian markets performing well included Hong Kong and Taiwan. Exports are also significantly higher to Central and South America, as the checkoff helped the U.S. beef industry capitalize on recently implemented free trade agreements.

Program Builds Nutrition Relationships

With their local and state focus, state beef councils are instrumental in building relationships with state professional organizations dedicated to improving the health of Americans. The national Beef Checkoff Program is assisting those councils in strengthening those ties.

The Nutrition Seminar Program (NSP), coordinated by NCBA, a Beef Checkoff contractor, provides an opportunity for state beef councils to get closer to their state chapters of health professional groups by providing a nationally recognized expert to speak on a nutrition topic at that organization's annual meeting. The Beef Checkoff also provides free client education resource materials to all session attendees.

State councils coordinate and execute the NSP session, while the national Beef Checkoff covers the honoraria and travel expenses for each speaker. This past year, 36 speaking engagements were coordinated by numerous councils.

There are 40 different speakers for states to choose from, covering 148 session topics.

Partners in Time



Throughout its 50-year history, the Federation of State Beef Councils has provided a platform for state beef council representation at the national level, while offering services needed by states to conduct their in-state promotion, education and research programs. The partnership is made possible three ways: through the

1985 Beef Promotion Act; by deliberate collaboration with national programs funded through the Beef Checkoff Program; and by voluntary contributions to the Federation by state beef council boards.

The voluntary investments by cattle-rich states helps make sure greater emphasis is placed on programs where the majority of consumers live and buy beef. It supports the teamwork necessary for building a successful state and national Beef Checkoff Program.

CATTLEMEN'S BEEF BOARD FISCAL YEAR 2013 EXPENDITURES

Category	Amount
Administration	\$1,536,829
USDA Oversight	\$279,075
Program Development	\$179,088
Program Evaluation	\$179,590
Producer Communications	\$1,529,824
Foreign Marketing	\$6,036,724
Industry Information	\$3,492,377
Consumer Information	\$3,390,267
Research	\$6,036,100
Promotion	\$15,528,767
Total expenses	\$38,188,641

*audited numbers