



Approved June 11, 2019

WBC MISSION STATEMENT

Increasing beef demand domestically and internationally for the benefit of Wyoming farmers and ranchers.

WBC VISION

The WBC will be the most respected and trusted beef marketing organization in Wyoming by ensuring responsible and effective allocation of checkoff funds to improve the marketing climate for beef and beef products.

FUNDING PHILOSOPHIES

Wyoming checkoff dollars have the greatest potential to affect a positive change in consumer behavior when pooled with dollars from other state beef councils and when used in high-population areas where beef is consumed rather than where it is raised.

The WBC is accountable to all Wyoming cattlemen and is responsible for ensuring that investors are aware of how their beef checkoff dollars are spent.



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Organization Information

Background

The Wyoming Beef Council (WBC) was created in 1971 by Wyoming cattlemen and women to administer a self-financed state beef checkoff; a program to develop, maintain and expand markets for beef. In 1985 when the national Beef Promotion Research Act was passed as part of the 1985 Farm Bill, the WBC became Wyoming’s official organization qualified to collect and administer the national beef checkoff. Upon implementation of the national beef checkoff, the WBC ceased in-state collections authorized through the state statute. Since October, 1986 WBC programs have been conducted with Wyoming funds collected under the national \$1-per-head beef checkoff.

Pursuant to the Beef Promotion Research Act and Order, fifty cents of each dollar collected in Wyoming is sent to the Cattlemen’s Beef Board. The expenditure of the remaining fifty cents is determined by cattlemen and cattlemen in the state who serve on the WBC. At the discretion of the WBC, state retained revenue may be sent to the Federation of State Beef Councils and the U.S. Meat Export Federation to support national and international marketing efforts.

Through industry-wide effort, grassroots beef producers have established a long-range plan to provide focus and to guide programs for the betterment of the industry. As the Qualified State Beef Council in Wyoming, the WBC supports the visions and priorities established in the Beef Industry Long-Range Plan 2016-2020 (appendix A).

Role of the Wyoming Beef Council

The WBC is a state agency and functions under the laws of the State of Wyoming as well as the Beef Promotion and Research Act. Under these statutes, the WBC is charged with:

- Collection of the beef checkoff.
- Ensuring compliance with the state and federal regulations.
- Coordinating the checkoff program in Wyoming with the Cattlemen's Beef Board and the Federation of State Beef Councils.
- Implementing state programs that support the vision and priorities of the Beef Industry Long-Range Plan.

All programs funded with Wyoming beef checkoff dollars must meet the criteria set forth in the Beef Promotion Research Act and Order.

Industry & Consumer Analysis

Cattle Numbers

As reported by the Wyoming Agricultural Statistics Service, the January 1, 2019 inventory of all cattle and calves in Wyoming totaled 1.32 million head, unchanged from the January 1, 2018 inventory and consistent with the January 1, 2017 count of 1.33 million head. Cattle numbers in Wyoming have been stable over the past few years, with the ten year average equaling 1.32 million head. Wyoming's largest head count of cattle and calves was established in 1975 at 1.69 million head.

Financial Trends

While cattle numbers are consistent, variables such as weather, cattle prices, feed prices, available grazing and other market conditions that motivate ranchers to retain or sell cattle can cause fluctuations in beef checkoff revenue. Historically, however, checkoff revenue can be predicted with reasonable accuracy by following historical trends. One reliable historical observation is that checkoff revenue is generally 72-75 percent of the number of cattle counted January 1. This is true for both fiscal year and calendar year calculations. Some fluctuation can be seen when averaging fewer than 5 years but the 10 and 20 year average are consistently within this range.

Consistent revenue does not mean that the WBC has not been impacted by inflation. The WBC began collecting the \$1-per-head checkoff in 1986. By comparison, that would be equivalent to \$2.39 per-head today. That disparity increases when the shrinking cow herd and heavier carcass weights are considered.

National Consumer Trends

As of 2018, the United States' total population was 326.7 million with 85 percent of the population residing in cities and suburbs. The Millennial Generation, those born between 1980 and the early 2000, is the largest segment of the US population, exceeding 83 million. Among the older half of millennials, those between ages 25-34, there are 10.8 million households with children. Further, with millennials accounting for 80 percent of the 4 million annual U.S. births, the number of new millennial parents stands to grow exponentially over the next decade.

The Beef Checkoff continues to conduct extensive research to understand the spending habits, beef knowledge and cooking comfort of this population segment. Some of the key findings of this research include:

- Millennials desire frequent home-cooked meals but say they just don't have the time.
- The majority want easy beef recipes that take 30 minutes or less to make.
- Millennials look to social media as a source for tips about preparing beef.
- 80% of millennial shoppers (primarily women) look for easy beef recipes, but are also looking for new cuisines, flavors and dishes with "wow" factor.
- Millennial parents want to make the best food choices for their families and are willing to learn.
- Millennials are interested in food processing, food production and its effects on the environment.
- Millennials are knowledge seekers. Seventy five percent want information about steaks and how to prepare and cook them and 55 percent want information on preparing and serving beef to their children.

Getting the news out about healthy beef benefits and convenience is critical in fully convincing this generation to feel comfortable and confident in choosing beef. In particular, special attention should

be focused on millennial parents, who tend to be more concerned about the healthfulness of beef than those without children. Additionally, children raised on beef are more likely to include beef in their diet later in life.

International Consumer Trends

Keeping national statistics in mind, it is also important to recognize that while domestic demand for beef has remained relatively consistent in recent years, global demand for premium protein is expected to increase 68 percent by 2050. Recent Cattle-Fax data shows that exports contribute \$320.92 to the per-head value of fed cattle. Nearly eighty dollars of this amount can be traced back solely to the Japanese market. In 2018, beef export value reached \$7.27 billion, up 15 percent over 2016 and 2 percent above the previous high achieved in 2014 (\$7.13 billion). It is also important to note that foreign markets frequently purchase underutilized cuts and variety meats providing an opportunity for producers to make money from parts of the animal that are not of high value to United States consumers.

Wyoming Consumer Trends

According to the U.S. Census Bureau, Wyoming's population was estimated at 563,626 in 2016, making it the least populous state in the United States. Wyoming is home to approximately 100,000 millennials with 51,000 of those falling into the primary household purchaser age range.¹

Compared to the Wyoming cattle inventory, there are approximately 2.34 cattle to every person, leading to the logical assumption that the majority of beef produced in Wyoming is purchased and eaten outside of the state.

Additionally, a Wyoming-Montana breakout of the national consumer research study fielded in January-February 2018 provided the following data:

- Wyoming/Montana (WY/MT) is similar to the Total U.S. in terms of how much beef, pork and fish is consumed weekly/monthly, although fewer WY/MT consumers eat chicken and plant-based protein weekly. Beef, chicken, pork and fish planned consumption is similar for both WY/MT and Total U.S.

¹ <https://suburbanstats.org/population/how-many-people-live-in-wyoming>

- WY/MT is more knowledgeable than the Total U.S. about how beef is raised for food, no different for beef and hogs.
- Overall perceptions and production perceptions (buckets) are similar for both WY/MT and the Total U.S. for beef and hogs, but for chicken WY/MT consumers are less positive than consumers in the Total U.S.
- When considering factors that drive the decision to eat beef, WY/MT cares far more than the Total U.S. about beef being an *excellent source of protein*; in fact, in WY/MT this is the #1 factor while in the U.S. it is #2 after *great taste*.
- *Good value for the money* is rated lower for beef in WY/MT compared to the Total U.S. (52% vs. 63%).
- When comparing beef to chicken WY/MT is more likely than the Total U.S. to rate beef better than chicken on: *Trusting people who raise it; being raised responsibly; being raised sustainably; being great tasting*.
- Similarly, fewer in WY/MT say chicken is better than beef on *nutritious, good for young children, or pleasurable*.
- Concerns about raising beef are similar in WY/MT compared to the Total U.S. with the exception of less concern regarding *foodborne and cattle illnesses, GMO in feed, and greenhouse gas emissions*.
- To encourage more beef consumption, WY/MT consumers are more interested than the Total U.S. in gaining *quick and easy beef meal ideas*, but they are much less in need of info about *how to cook the perfect steak*.

Investor Trends

Wyoming is home to approximately 5,600 beef ranchers who are all required to pay the beef checkoff. Because the beef checkoff is a mandatory program, state beef councils have the responsibility of ensuring investors and constituents are aware of how their money is being spent. A survey of Wyoming cattlemen conducted January 2018 showed 78 percent of Wyoming beef producers feel informed about the beef checkoff compared to 65 percent nationally. However, the survey also showed a five percent decrease in the number of Wyoming producers who approve of the beef checkoff when compared to 2015 survey results.

Results of Industry & Customer Analysis

The current Wyoming Beef Council Strategic Plan was developed in 2015 and revised in 2016 to coordinate with updates to the Beef Industry Long Range Plan. The core strategies and tactics that follow have been developed to specifically address the priorities in the Strategic Plan while following the requirements of the Beef Promotion Research Act and Order and coordinating with the Beef Industry Long Range Plan.

Strategic Priorities

1. ***Support the mission and vision of the beef industry long range plan.***
 - A. Capitalize on Wyoming's ranching culture and heritage to improve the image of the beef community among millennial parents and key thought leaders.
 - B. Entice millennial parents to cook beef and share recipes by providing recipes that showcase Wyoming's culture and heritage.
 - C. Proactively educate influencers of and apprise producers about environmentally, socially and economically sustainable beef production practices.
 - D. Educate health and nutrition influencers about the nutritional benefits of beef.
2. ***Increase understanding of and support for the beef checkoff.***
 - E. Increase percentage of Wyoming beef producers who feel informed about the checkoff to 80%.
 - F. Increase approval rating of the beef checkoff in Wyoming to 75%.



Core Priorities, Tactics and Goals

I. Support the mission and vision of the beef industry long range plan.

Priority A: Capitalize on Wyoming's ranching culture and heritage to improve the image of the beef community among millennial parents and key thought leaders.

1. Reach Japanese consumers through a U.S. Red Meat Market Development Partnership with the U.S. Meat Export Federation.

Goal: Reach 250,000 Japanese consumers.

2. Utilize wybeef.com and social media to share Wyoming ranching stories with millennial parents and key thought leaders across the globe.

Goal: Increase wybeef.com page views by ten percent. (Current page views are just under 20,000 per year).

3. Create and promote four videos bringing every day ranch life into the homes of millennial parents, key thought leaders and influencers across the globe.

Goal: Increase YouTube views to 300,000. (Views are currently 200,000 per year).

Priority B: Entice millennial parents to cook beef and share recipes by providing recipes that showcase Wyoming's culture and heritage.

4. Through financial investment in the Federation of State Beef Councils the WBC will support the industry in its effort to develop convenient beef recipes and share them with millennial parents through beefitswhatsfordinner.com and social media outlets.

Goal: Increase Beef Demand Index measure by 2 percent annually.

5. Utilize wybeef.com and social media to share recipes, cooking techniques and beef nutrition information with millennial parents and key thought leaders across the globe.

Goal: Increase wybeef.com page views by ten percent. (Current page views are just under 20,000 per year).

6. Produce and promote six YouTube videos to feature quick and easy recipes prepared by a Wyoming Culinary School graduate and nutrition and wellness tips from a Wyoming registered dietitian.

Goal: Increase YouTube views to 300,000 and website pageviews by ten percent.

7. Identify and draw attention to two beef "holidays" through traditional press relations, social media outreach and television and radio interviews.

Goal: Reach 10,000 Wyomingites with a positive beef message and draw attention to the Wyoming Beef Council and Wyoming's beef industry.

8. Through a three-month Google search and YouTube advertising campaign, the WBC will draw millennial parents and key thought leaders to the WBC website and YouTube Channel.

Goal: Increase YouTube views to 300,000 and website pageviews by ten percent.

9. Through a beef-surplus state partnership coordinated by the Federation of State Beef Councils, called the Top 5 States Media Campaign the WBC will increase traffic to the "Beef. It's What's for Dinner" (BIWFD) website and BIWFD YouTube channel by purchasing search terms in markets of the top 5 most populated states in the US. (CA, FL, IL, NY and PA).

Goal: Deliver 2 million impressions, and 100,000 pageviews to beefitswhatsfordinner.com; deliver 5 million video impressions, and 1.2 million video views to the BIWFD YouTube Channel.

10. The WBC will support and encourage grassroots beef promotion and education efforts directed toward millennial parents through partnership with Wyoming CattleWomen and affiliated county CattleWomen groups.

Goal: Reach 200 millennial parents in Wyoming communities with positive beef nutrition messages, compelling beef production information and quick and easy recipes.

11. The WBC will support Wyoming's First Lady Jennie Gordon in her initiative to combat childhood hunger in Wyoming.

Goal: Reach 10,000 millennial parents with a positive message about the nutritional benefits and satiety of beef through beef product donation and publicity surrounding events.

Priority C: Proactively educate influencers and apprise beef producers about environmentally, socially and economically sustainable beef production practices.

12. Through financial investment in the Federation of State Beef Councils, the WBC will support the industry in its effort to define, promote and educate consumers about environmentally, socially and economically sustainable beef production practices.

Goal: Increase Beef Demand Index measure by 2 percent annually.

13. WBC will partner with Wyoming Agriculture in the Classroom to roll out the Wyoming Stewardship Project classroom curriculum to Wyoming educators. These lessons will arm educators and students with facts about environmentally socially and economically sustainable beef production practices.

Goal: Lesson to be incorporated into 140 classrooms with outreach to 2,800 Wyoming students.

Priority D: Educate health and nutrition influencers about the nutritional benefits of beef.

14. Through financial investment in the Federation of State Beef Councils, the WBC will support the industry in its effort to identify health influencers and share research and science based facts about the nutritional value of beef.

Goal: Increase Beef Demand Index measure by 2 percent annually.

15. WBC will reach out to nutrition and health influencers including the Academy of Nutrition and Dietetics, Wyoming Diabetes Management, Wyoming Department of Health, Wyoming School Nurses Association, Wyoming Department of Education, Women Infants and Children, UW County Extension Service and Wyoming Cancer Control Consortium to provide educational opportunities featuring beef nutrition and production facts.

Goal: Reach 120 nutrition and health influencers with positive beef messages.

16. WBC staff will research the potential for a Wyoming Team Beef and report to the members of the Council by April, 2020.

II. Increase understanding of and support for the beef checkoff.

Priority E: Increase percentage of Wyoming beef producers who feel informed about the checkoff to 80%.

17. WBC will reach 5,400 cattlemen twelve times with information about the use of beef checkoff dollars through quarter-page, two-color ads in the Wyoming Livestock Roundup.
18. WBC will reach 13,444 Wyoming Farm Bureau members ten times with information about the beef checkoff through quarter-page, black and white ads in *Wyoming Agriculture*, a publication of the Wyoming Farm Bureau Federation.

19. WBC will produce an online annual checkoff report and call attention to it through contract advertising and media relations. Printed copies will be inserted into the Wyoming Livestock Roundup with additional copies available for trade show distribution.
20. WBC staff will produce and e-mail a minimum of ten informational e-newsletters to inform cattlemen about beef checkoff programs.
21. WBC will reach cattlemen and consumers alike with 100 thirty-second catchy innovative nationally-produced radio ads aired on 21 Northern Broadcasting stations.

Priority F: Increase approval rating of the beef checkoff in Wyoming to 75%.

22. Through public relations and visible presence the WBC will strive to display transparency and accountability to checkoff investors.
23. WBC will measure how informed Wyoming producers feel about the checkoff and the resulting checkoff approval rating by participating in a heavy-up of the national producer attitude survey conducted annually by the Cattlemen's Beef Board January 2020.

ADDITIONAL RESPONSIBILITIES—Collections Compliance

24. Maintain an inter-agency agreement with Wyoming Livestock Board, brand division, to ensure continued beef checkoff collection.
25. Conduct a fiscal year audit with McGee, Hearne & Paiz, LLP according to CBB and State of Wyoming standards and requirements.
26. Provide all documentation and cooperation required by the Cattlemen's Beef Board during the fiscal year to fulfill the role of a qualified state beef council
27. Process and return state of origin money to originating states.

ADDITIONAL RESPONSIBILITIES—Administration

28. WBC staff will provide administrative support services to all program areas and projects approved by the WBC members.
29. WBC staff will reimburse travel expenses for WBC members who travel to conduct Council business. Vouchers will be completed by WBC staff within 5 days of having received the necessary documentation and receipts from the member who traveled.
30. WBC Executive Director will conduct new member training and review fiduciary responsibility and liability of board members annually.
31. WBC will evaluate all programs according to the goals set in the FY2020 Marketing Plan.

32. WBC Executive Director will attend appropriate Joint Ag interim topics committee meetings and provide pertinent educational information to committee members.