



WYOMING BEEF COUNCIL

MARKETING PLAN | FY 2022

WBC MISSION

Benefit Wyoming's beef community and economy by increasing domestic and international beef demand.

WBC VISION

The WBC will remain the most trusted beef promotion and education resource in Wyoming and responsibly steward beef checkoff funds to improve the marketing climate for beef.

WBC BELIEFS

We believe in investing beef checkoff dollars in markets and programs that have the most potential to increase beef demand in Wyoming, nationally and internationally;

We value and seek collaboration with traditional and non-traditional partners to best serve the industry and checkoff investors;

We are accountable to all Wyoming beef producers and are responsible for ensuring that investors are aware of how their beef checkoff dollars are spent.

Table of Contents

1.	<u>Organization Information</u>	3
2.	<u>Industry and Consumer Analysis</u>	3
	<u>WY Cattle Numbers</u>	4
	<u>WY Financial Trends</u>	4
	<u>WY Consumer Trends</u>	5
	<u>National Consumer Trends</u>	5
	<u>International Consumer Trends</u>	5
	<u>Investor Trends</u>	6
3.	<u>Results of Industry and Customer Analysis</u>	6
4.	<u>2021-2026 WBC Strategic Priorities</u>	7
5.	<u>FY 2022 Tactics and Goals</u>	8
	<u>Exports</u>	8
	<u>Sustainability</u>	8
	<u>Beef Quality Assurance</u>	9
	<u>Beef Nutrition</u>	10
	<u>Beef Checkoff Knowledge and Support</u>	11
	<u>Compliance and Administration</u>	13
6.	<u>Proposed FY 2022 Partners</u>	14
7.	Appendix A: Beef Industry Long Range Plan.....	15

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 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 2021-2025 (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 state and federal regulations.
- Coordinating checkoff programs 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

Wyoming Cattle Numbers

The January 1, 2021 inventory of all cattle and calves in Wyoming totaled 1.3 million head, down 2 percent from January 1, 2020, according to the Cattle Survey conducted by the Mountain Regional Field Office of the National Agricultural Statistics Service, USDA. Beef cows, at 702,000 head, were down 22,000 head from the previous year. Milk cows increased 2,000 head from 2020 to 8,000 head. Cattle numbers in Wyoming have been relatively stable over the past decade, with the ten year average equaling 1.31 million head. Wyoming's largest head count of cattle and calves was established in 1975 at 1.69 million head.

Wyoming Financial Trends

While cattle numbers remain 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. 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 and calendar year calculations.

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.

Wyoming Consumer Trends

According to the U.S. Census Bureau, Wyoming's population was estimated at 578,759 in 2019, making it the least populous state in the United States. Compared to the Wyoming cattle inventory, there are approximately 2.25 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.

National Consumer Trends

Considering that the majority of beef produced in Wyoming is consumed outside of the state, addressing national consumer trends is crucial to improving the marketing climate for beef. Beef checkoff funded consumer research is the data relied upon to identify key components of consumer sentiment regarding beef. Four key observations made by the Long Range Planning Committee strongly resonated with the WBC during strategic planning. First, there is an increased desire among consumers to know more about where food comes from and how it is produced. Second, the interest in food system sustainability continues to grow meaning there is great opportunity for the industry to communicate the positive net environmental impact of beef production. Third, medical, diet and health professionals continue to rely on scientific information about beef production, animal care, beef industry sustainability, beef safety and nutrition. Finally, while the diet and health community has recently substantiated the value of protein in a healthy diet, today's consumers have more options for consuming protein than ever before.

International Consumer Trends

Clearly, there is much work to be done in the US, however, 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 \$321.20 to the per-head value of fed cattle. While 85% of U.S. beef production is consumed in the domestic market, the portion that is exported leans heavily toward variety meat items that attract little or no interest from domestic consumers and underutilized muscle cuts for which

domestic demand is lacking. For example, beef tongue exports to Japan equate to about \$12 per head of U.S. fed cattle. Beef tripe exports to Mexico were worth \$112 million in 2019 – an increase of 30% over 2018 – while total beef variety meat exports to Mexico were worth \$277 million, up 21%. Nearly all of U.S. beef livers are exported, to markets such as Egypt, South Africa, Mexico and Southeast Asia.

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 2020 through a deep dive into the strategies and priorities identified in the beef industry Long Range Plan. The tactics and goals outlined here have been developed to specifically address the priorities set by the Council during the planning process while following the requirements of the Beef Promotion Research Act and Order and incorporating the vision and goals of the Beef Industry Long Range Plan.

2021-2026 WBC STRATEGIC PRIORITIES

I. Support the mission and vision of the beef industry Long Range Plan.



Drive growth in beef exports.



Tell the positive story of sustainable beef cattle production.



Educate the public about Beef Quality Assurance and its impact on animal well-being.



Promote the role of beef in a healthy and sustainable diet.

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



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

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



FY 2022 Tactics and Goals

I. Support the mission and vision of the beef industry Long Range Plan.



Drive growth in beef exports.

1. Collaborate with the US Meat Export Federation (USMEF) to identify key markets and messages for outreach to foreign countries. This collaboration will include consideration of any beef marketing plans being made in foreign markets by the Wyoming Business Council.

FY Goal: Reach 300,000 international beef consumers by showing Wyoming faces and open spaces as the image associated with US beef production.

Long Term Goals:

Grow U.S. beef exports to 17% of U.S. beef production by 2025.

Grow the value of U.S. beef exports as a percent of total beef value to 21%.



Tell the positive story of sustainable beef cattle production.

2. Add a two ranching stories to the “Meet the Ranchers” page of the WBC website one of which will feature the 2021 Wyoming Stewardship Award winner.
3. Launch “#WYBeef” campaign where producers, consumers and people from all walks of life provide 10-15 second video sound bites stating why they love beef. Messaging will include sustainability, nutrition and beef quality assurance.
4. Participate in the State Dashboard Survey to assess beef consumption habits, beef production concerns and attitudes toward beef production in Wyoming.
5. Conduct three Masters of Beef Advocacy Trainings and identify three committed spokespersons to share positive beef production messages through social media and letters to the editor.

6. Partner with Wyoming Agriculture in the Classroom to ensure distribution of the Wyoming Stewardship Project classroom curriculum to Wyoming educators. These lessons arm educators and students in grades 2-5 with facts about environmentally socially and economically sustainable beef production practices.
7. Establish a grant to encourage Wyoming research in the areas of product quality, beef safety, human nutrition and beef sustainability.
8. Through financial investment in the Federation of State Beef Councils, the WBC will support the industry in its effort to promote and educate consumers about environmentally, socially and economically sustainable beef production practices.

FY Goals: Increase social media engagements by 5 percent per platform.

Establish a baseline for evaluating impact of new strategic priorities.

Reach 245 Wyoming Educators and 7,500 Wyoming Students with beef sustainability messages through the Wyoming Stewardship Program.

Increase awareness of beef checkoff research projects and encourage participation by and for Wyoming.

Long Term Goals:

Improve the Consumer Trust Index by five percentage points by 2025.



Educate the public about Beef Quality Assurance and its impact on animal well-being.

9. Utilize wybeef.com, social media and statewide radio to share Wyoming Beef Quality Assurance (BQA) facts with the public. Social media and YouTube videos will be promoted through a coordinated Google Search and YouTube promotion campaign. (The “#WYBeef” campaign will also feature BQA messaging).
10. Collaborate with the University of Wyoming Beef Extension Specialist to increase the number of Wyoming producers certified through the national BQA program.
11. Offer in-person BQA trainings to county Cattlemen and CattleWomen groups as well as the Wyoming Collegiate Cattle Association.

12. Through financial investment in the Federation of State Beef Councils, the WBC will support the industry in its effort to promote and educate consumers about the value of Beef Quality Assurance.

FY Goals: Establish a baseline measurement of public knowledge about BQA from which future goals can be set.

Add 20 names to the list of Wyoming BQA certified producers.

Long Term Goals:

Grow BQA certifications by a cumulative total of 10% per year by 2025.

Improve the Consumer Trust Index by five percentage points by 2025.



Promote the role of beef in a healthy and sustainable diet.

13. 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 capitalize on opportunities to promote the role of beef in a healthy and sustainable diet.
14. Through partnerships with Wyoming's Family, Career and Community Leaders of America (FCCLA) and ProStart, the Wyoming Beef Council will prepare future influencers to advocate for beef.
15. Share "Beef as a First Food" information to influencers and the public through collaboration with the Wyoming Department of Health, Women, Infants and Children and the UW County Extension Service.
16. 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).

17. The WBC will support and encourage grassroots beef nutrition information distribution through partnership with Wyoming CattleWomen and affiliated county CattleWomen groups.
18. The WBC will support Wyoming's First Lady Jennie Gordon in her initiative to combat childhood hunger in Wyoming.
19. 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.

FY Goals: Deliver 2 million impressions, 100,000 pageviews and 4 million video impressions to BIWFD social platforms where current sustainability and BQA messages will be featured.

Reach 10,000 Wyoming consumers with positive beef nutrition and beef production information.

Share beef nutrition research with 1,000 health influencers.

Reach 300 culinary arts students and 25 educators with positive beef information and cooking experience.

Long Term Goals:

By 2025, narrow the perception gap between beef and chicken by at least five percentage points as measured by the checkoff funded beef tracker.

By 2025, increase beef's value index by at least five percentage points as measured by the checkoff funded beef tracker.

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



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

20. Reach 5,600 cattlemen twelve times with information about the use of beef checkoff dollars through quarter-page, two-color ads in the Wyoming Livestock Roundup.
21. WBC will insert two printed copies of the Wyoming edition of The Drive into the Wyoming Livestock Roundup reaching 5,600 publication subscribers.

22. WBC will reach 13,444 Wyoming Farm Bureau members ten times with information about the beef checkoff through 10 quarter-page, black and white ads in Wyoming Agriculture, published by the Wyoming Farm Bureau Federation.
23. WBC will produce an annual checkoff report which will be available on the WBC website. Additionally, printed copies will be inserted into the Wyoming Livestock Roundup with additional copies available for trade show distribution.
24. WBC staff will produce and e-mail a minimum of ten informational e-newsletters to inform cattlemen about beef checkoff programs and will insert information into two nationally produced *The Drive* print newsletters from the CBB.
25. WBC will reach cattlemen and consumers alike with 100 thirty-second catchy innovative radio ads aired on 22 Northern Broadcasting stations.
26. WBC will achieve 10,000 impressions on NorthernAg.net by airing a 15-second WY Beef video monthly during the livestock report for five months.
27. WBC will reach cattlemen and consumers alike with 65 thirty-second catchy innovative radio ads aired on 16 Western Ag Radio stations and five monthly project update radio interviews.



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

28. Through public relations and visible presence, the WBC will display transparency and accountability to checkoff investors.
29. 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. The survey will be completed by January 2025.



COMPLIANCE AND ADMINISTRATION

30. Maintain the inter-agency agreement with Wyoming Livestock Board, brand division, to ensure continued beef checkoff collection.
31. Conduct an annual financial audit with McGee, Hearne & Paiz, LLP according to CBB and State of Wyoming standards and requirements.
32. 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
33. Process and return state of origin money to originating states.
34. WBC staff will provide administrative support services to all program areas and projects approved by the WBC members.
35. 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.
36. WBC Executive Director will conduct new member training and review fiduciary responsibility and liability of board members annually.
37. WBC will evaluate all programs according to the goals set in the FY2022 Marketing Plan.

THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK



FY 2022 Proposed Partners

Cattlemen's Beef Board
Central Wyoming College
Family, Career and Community Leaders of America
NCBA's Federation of State Beef Councils
Northern Broadcasting, Inc.
Office of Wyoming's Governor Mark Gordon
ProStart: Wyoming Restaurant and Lodging Association
United States Meat Export Federation
UW County Extension Service
UW Beef Extension Specialist
Western Ag Radio Network
Women Infants and Children (WIC)
Wyoming Academy of Nutrition and Dietetics (WAND)
Wyoming Agriculture in the Classroom (WAIC)
Wyoming Association of Health, PE, Recreation & Dance (WAHPERD)
Wyoming Business Council
Wyoming Cancer Control Consortium
Wyoming CattleWomen and County CattleWomen and CowBelle affiliates
Wyoming Collegiate Cattle Association
Wyoming Department of Agriculture
Wyoming Department of Education
Wyoming Department of Health
Wyoming Diabetes Management
Wyoming Farm Bureau Federation
Wyoming's First Lady, Jennie Gordon
Wyoming Hunger Initiative
Wyoming Livestock Board
Wyoming Livestock Roundup
Wyoming School Nurses Association
Wyoming Stock Growers Association