

BEEF
IT'S WHAT'S FOR DINNER®

CONSUMER IMAGE INDEX REPORT



PELEGRIN
RESEARCH GROUP



Funded by Beef Farmers & Ranchers

METHODOLOGY

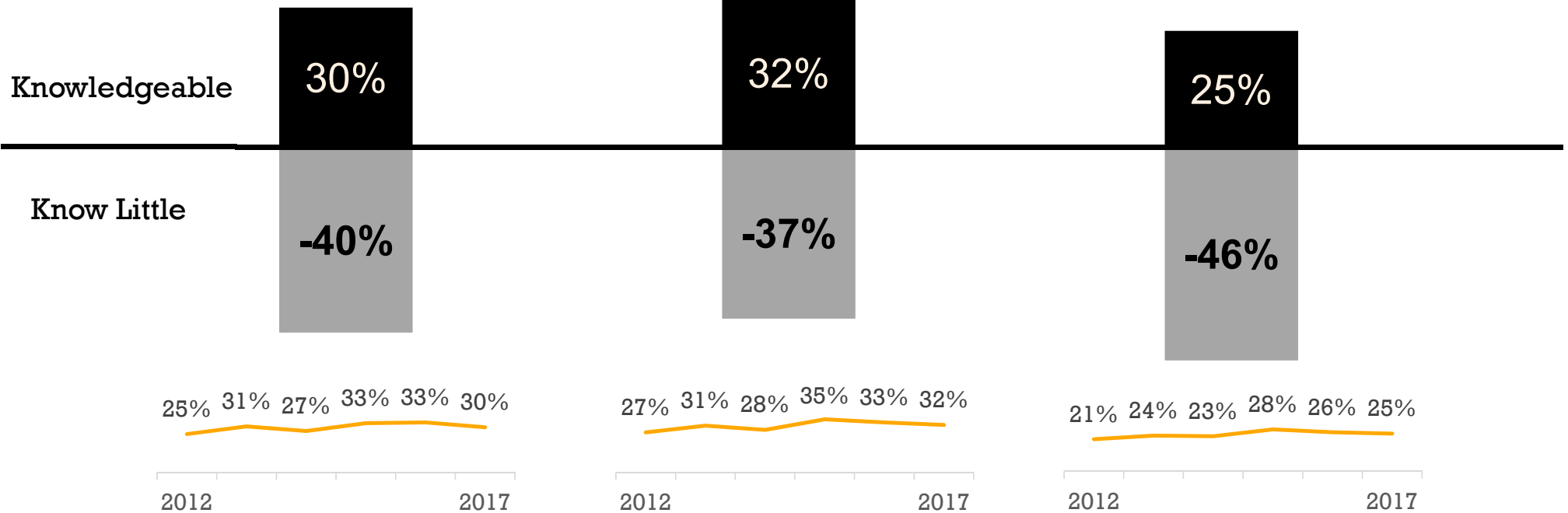
- In early 2012 the beef checkoff developed and launched the Consumer Image Index (CII) program to track consumer perceptions related to the beef industry's production practices and hot button issues.
- Continuing the methodology used for the Consumer Image Index surveys conducted in 2012-2016, participants from a nationally representative sample of U.S. consumers, balanced for gender, age and ethnicity, were screened to be:
 - 18-65 years old
 - Involved in household grocery shopping and meal decisions
 - Within standard security screening
- The current wave of 1,195 consumers was conducted online November 14th-21st, 2017, with trending analysis for the total sample and the target samples

KNOWLEDGE ABOUT HOW ANIMALS ARE RAISED

How Cattle Are Raised

How Chickens Are Raised

How Hogs Are Raised



Key: Significant change in ongoing trend (↗↘) and/or higher/lower than non-segment (↑↓)

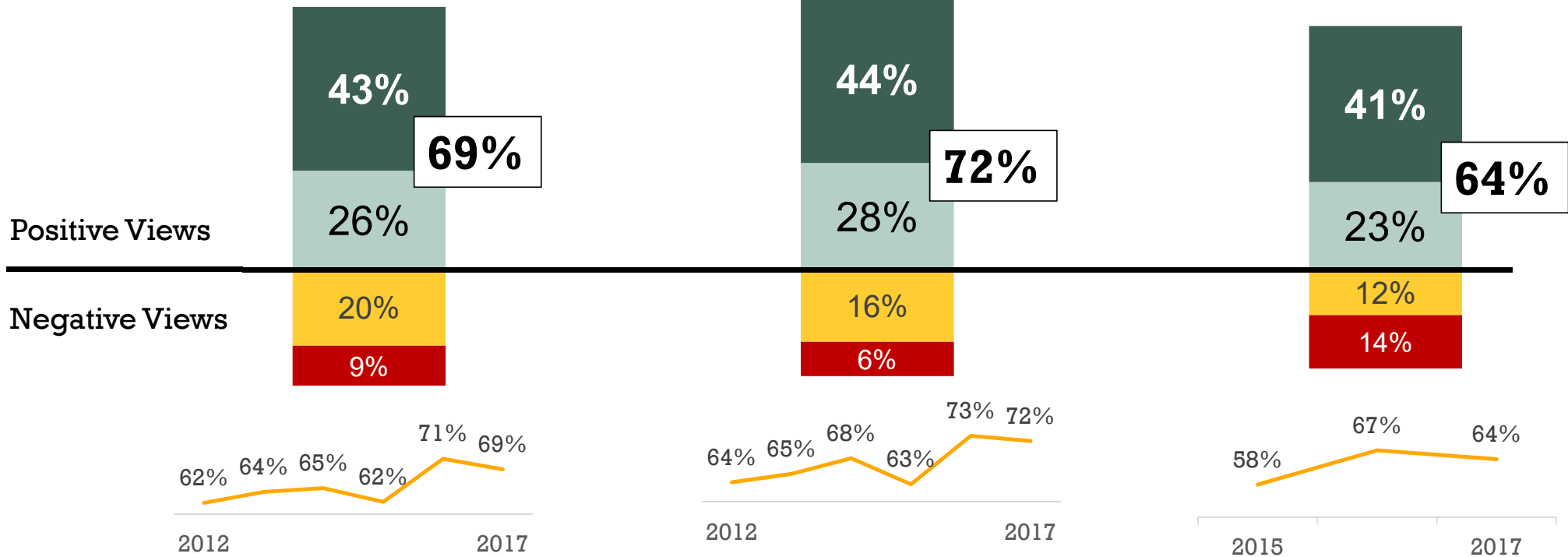
Q.15: Please indicate how knowledgeable you are about each of the following...

MEAT PRODUCTION PERCEPTIONS

How Cattle Are Raised

How Chickens Are Raised

How Hogs Are Raised



Key: Significant change in ongoing trend (↗↘) and/or higher/lower than non-segment (↑↓)
 Q.21/22/22a: Thinking specifically about how **cattle/chickens/hogs** are raised for food in the U.S., do you believe that...?
 Source: 2017 Consumer Image Index

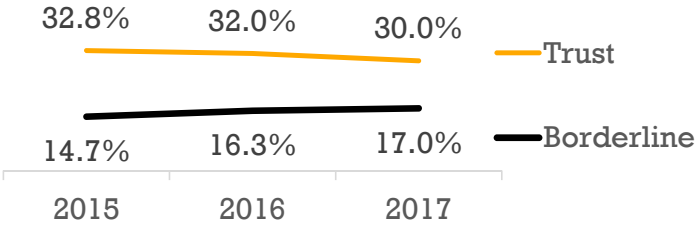
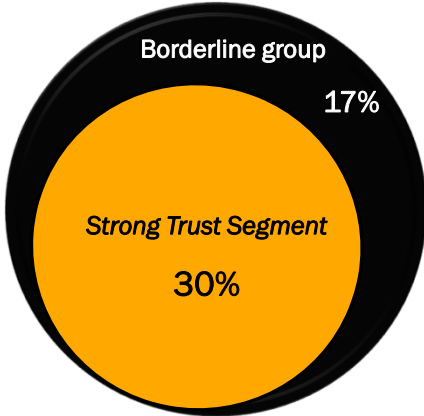
■ Bucket 1 ■ Bucket 2 ■ Bucket 3 ■ Bucket 4

TRUST MEASURE

Six components of the "Strong Trust Segment" – consumers who are highly positive (7/8/9/10) for 5+ of the 6 items.

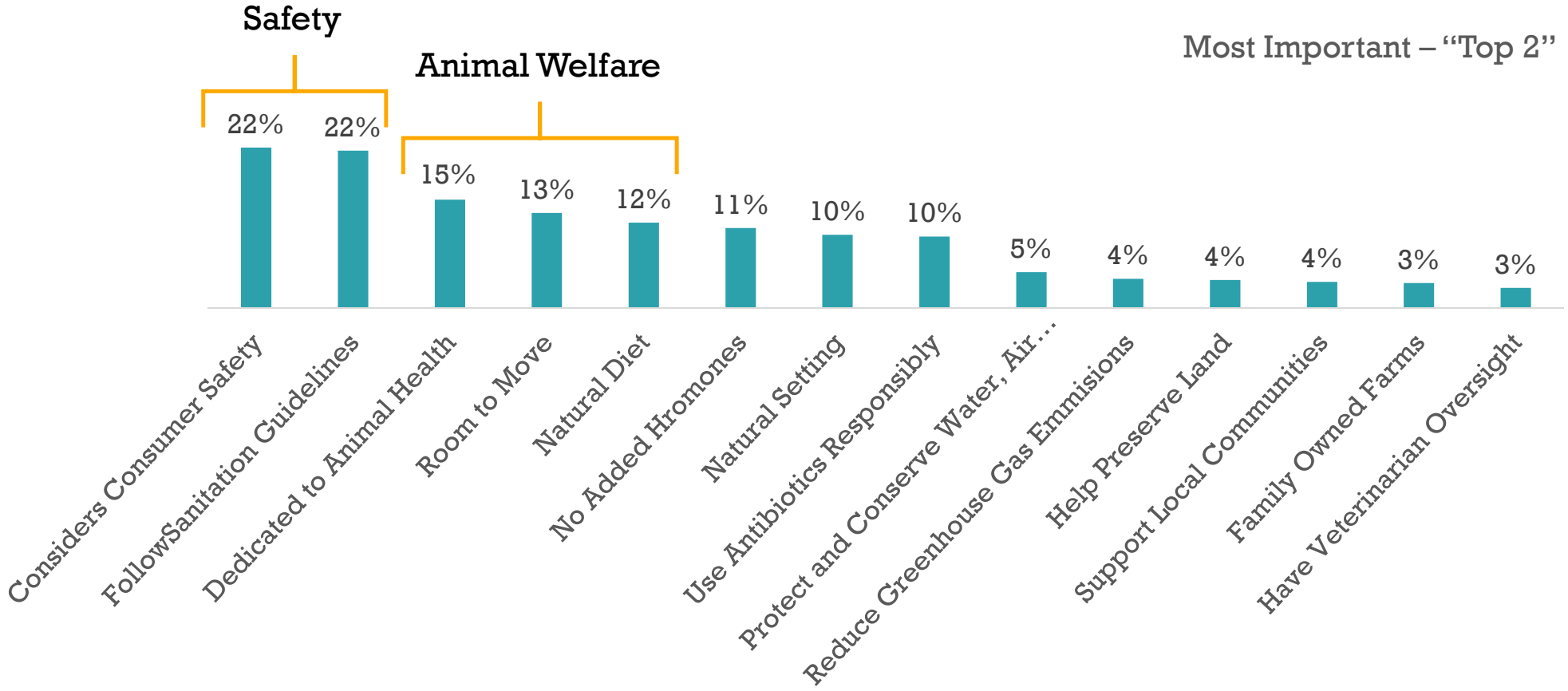
Beef Industry Trust

Those who trust (top 4 box) that ...



Key: Significant change in ongoing trend (↗↘) and/or higher/lower than non-segment (↑↓)
 Q.27a. On a scale of 0 to 10, where 0 is 'do not trust at all' and 10 is 'completely trust', how would you rate your trust that the ...?

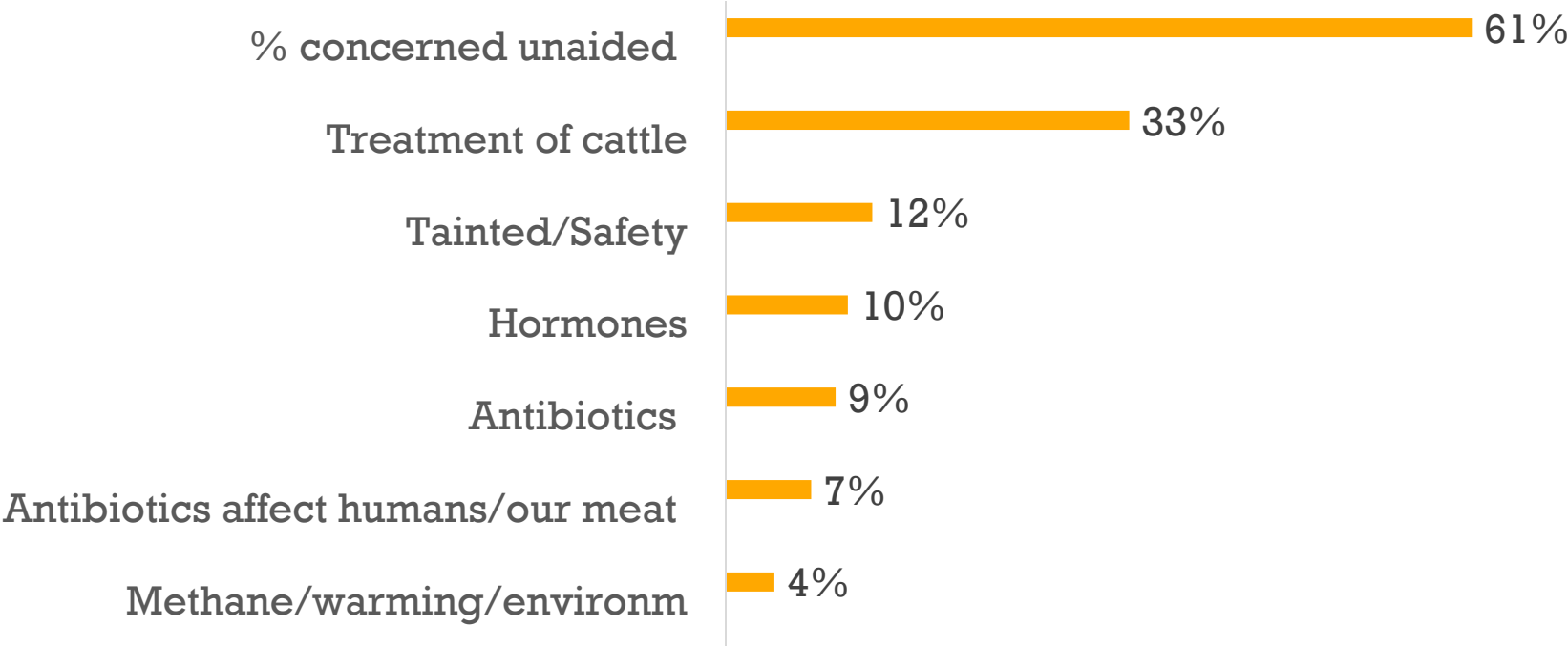
While top-2 box scores indicate that most things we ask about are important to consumers, when we ask them to choose the two most important factors for the meat industry, safety and animal welfare are the top item. The other aspects are still important but in all things we study safety and animal welfare (and how that relates to the topic your are communicating) remain the most important.



Q.16a: Of those you noted as highly important for the U.S. meat industries, which are the two that you consider most important? [Those with less than three autoscored]

Source: 2017 Consumer Image Index

Unprompted concerns follow a similar pattern as importance but here we see animal care as the most mentioned concerned followed by safety. This tells us that safety is important but many consumers are not worried about the beef industry taking care of that issue.



Source: 2017 Consumer Image Index