

USDA

Beef Producers Attitude Survey

REPORT

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1.0 Introduction

Beef Producers Attitude Study –Overview

In early September, the United States Department of Agriculture contracted with the Gallup Organization to conduct a survey of beef producers. As a result of a recent settlement, the U.S. Department of Agriculture, the Livestock Marketing Association, the Federation of State Beef Councils and the Cattleman’s Beef Promotion and Research Board worked together in development of this survey. The purpose of the survey was to determine the attitudes of beef producers regarding the Beef Checkoff program. This information can then be used by the USDA in its planning efforts to improve the program.

A sample of producers was obtained using three sources. The largest sampling frame was provided by Farm Market ID which included roughly 600,000 cattle operations that had applied for subsidies and were available through the Freedom of Information Act. Farm Journal/Beef Today provided the next largest frame which consisted of approximately 300,000 records based on subscriptions to farm publications. Farm Progress provided the final frame consisting of over 263,000 records for subscribers to Farm Progress Publications. Each organization provided sample on a per-record basis and thus a full assessment of overlap between frames was not cost feasible. However, with the total universe of beef producers being roughly 1 million, it is clear that a majority of producers were included in the initial sampling frame. Further, sample orders were stratified by state and size of operation to ensure that representative samples were obtained from vendors.

In total, 8,002 beef producers were interviewed from October 4, 2006, to November 21, 2006 using computer assisted live telephone interviews. At least three call attempts were made to each sampled number to maximize the likelihood of interview. The maximum margin of sampling error for a sample of 8002 interviews is 1.1%. Table A shows how much allowance should be made for the sampling error around a single percentage estimate in the study.

Table A: Recommended Allowance for Sampling Error of a Percentage
*In percentage points (at 95 in 100 confidence level)**

Sample Sizes Near:	For percentages near:					
	5/95% ±	10/90% ±	20/80% ±	30/70% ±	40/60% ±	50/50% ±
100	4.3	5.9	7.9	9.0	9.7	9.8
200	3.0	4.2	5.6	6.4	6.8	6.9
300	2.5	3.4	4.5	5.2	5.6	5.7
400	2.1	2.9	3.9	4.5	4.8	4.9
500	1.9	2.6	3.5	4.0	4.3	4.4
600	1.7	2.4	3.2	3.7	3.9	4.0
800	1.5	2.1	2.8	3.2	3.4	3.5
1,000	1.4	1.9	2.5	2.8	3.0	3.1
1,500	1.1	1.5	2.0	2.3	2.5	2.5
2,000	.96	1.3	1.8	2.0	2.1	2.2
2,500	.85	1.2	1.6	1.8	2.0	2.0
3,000	.78	1.1	1.4	1.6	1.8	1.8
4,000	.68	.90	1.2	1.4	1.5	1.5
5,000	.60	.80	1.2	1.3	1.3	1.4
8,000	.48	.66	.88	1.0	1.1	1.1

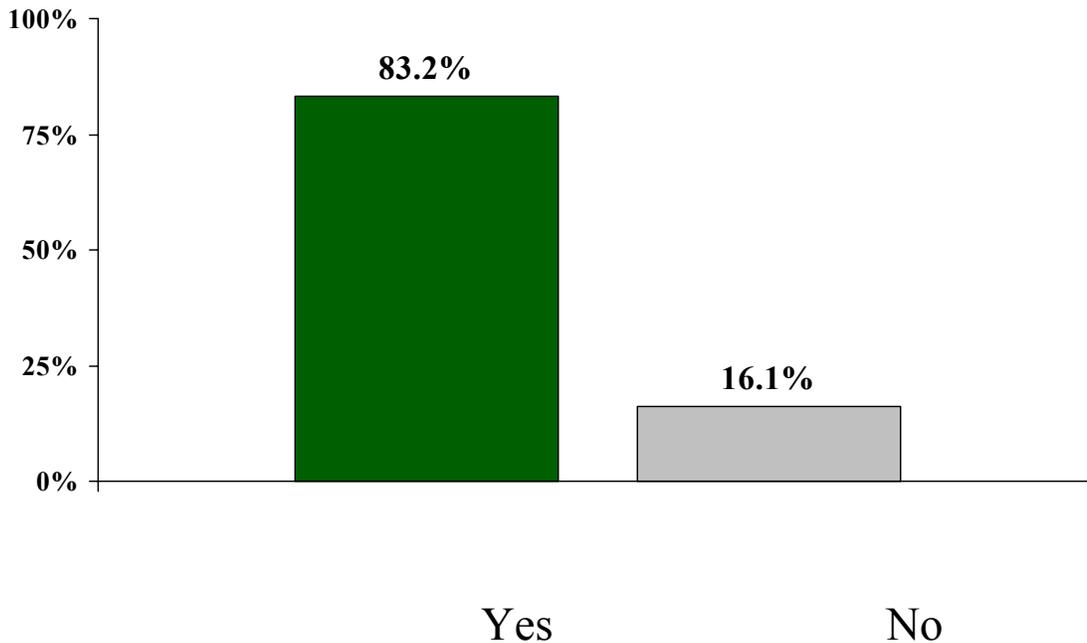
* The chances are 95 in 100 that the sampling error is not larger than the figures shown.

2.0 Results

2.1 Unaided Awareness of \$1-per-head Beef Checkoff program

Respondents were asked if they had ever heard of the \$1-per-head Beef Checkoff program (other than the letter they may have received from the Gallup Organization about the survey). Overall, awareness is high. More than eight in ten (83.2%) respondents said they were aware of the program.

***Unaided Awareness of \$1-per-head beef checkoff program
(n = 8002)***



Question 1: Other than the letter you may have received about this survey, have you ever heard of the \$1-per-head beef checkoff program?

Figure 1: Yes/No Rating

Q1. Other than the letter you may have received about this survey, have you ever heard of the \$1-per-head Beef Checkoff program?

2.1a Awareness of \$1-per-head Beef Checkoff program by Type of Producer

The only group that is significantly lower in unaided awareness is the veal producers.

Unaided Awareness of \$1-per-head beef checkoff program by Type of Producer

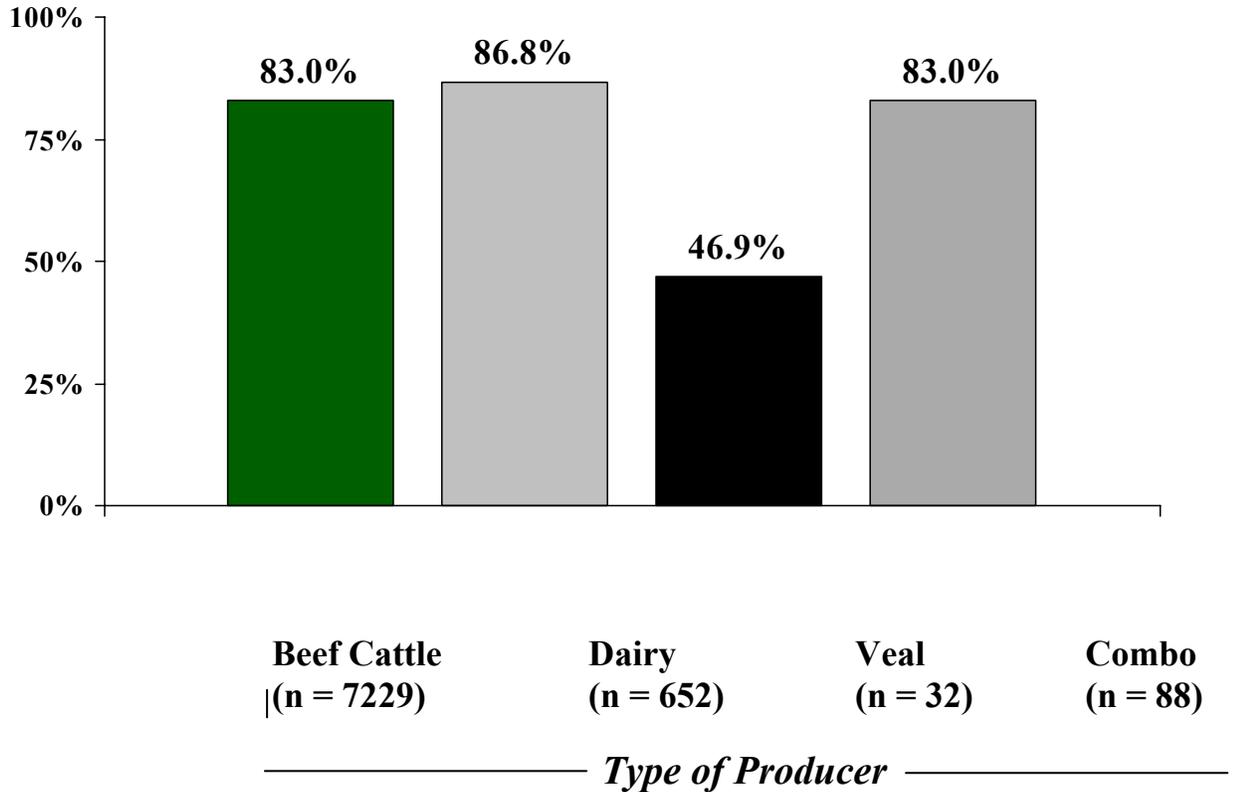


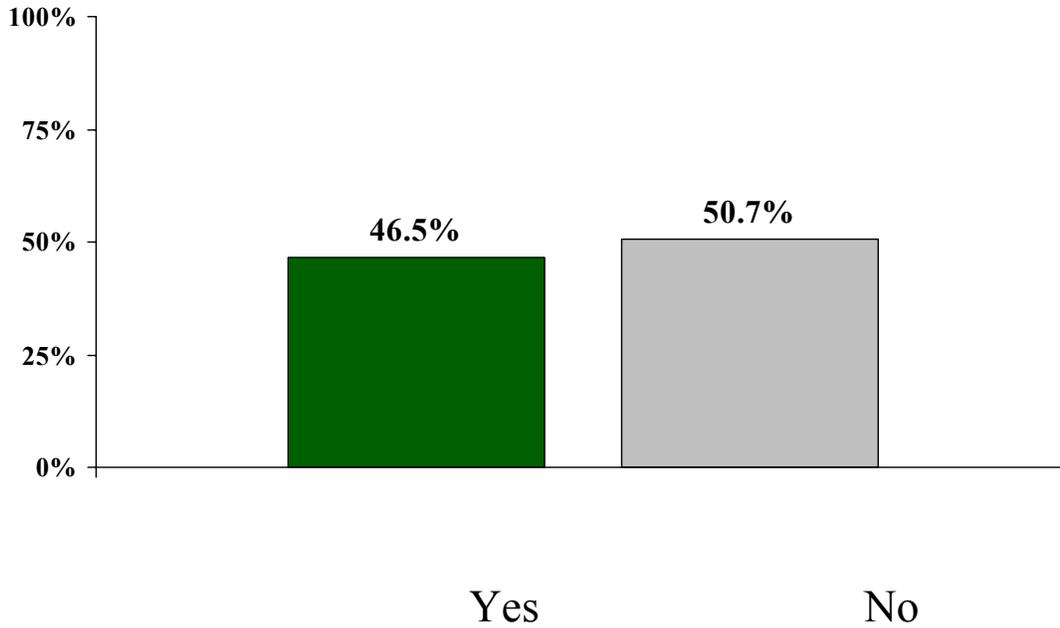
Figure 2: Yes/No Rating by Type of Producer

Q1. Other than the letter you may have received about this survey, have you ever heard of the \$1-per-head Beef Checkoff program?

2.2 Aided Awareness

When told what the Beef Checkoff program is, an additional 46.5% of those previously stating that they were unaware of it, claimed awareness. This brings the total percent aware of the program to 91.0% (including 83.2% unaided plus 7.8% of the total who were aided).

***Aided Awareness of \$1-per-head beef checkoff program
(n = 1345)***



Question 2: The beef checkoff is the program in which beef producers pay one dollar per head each time they sell cattle. This money is then used for beef promotion and research. Now, do you recall having heard about the checkoff?

Figure 3: Yes/No Rating

Q2. The Beef Checkoff is the program in which beef producers pay one dollar per head each time they sell cattle. This money is then used for beef promotion and research. Now, do you recall having heard about this Beef Checkoff?

Awareness of \$1-per-head beef checkoff program
(N = 8002)

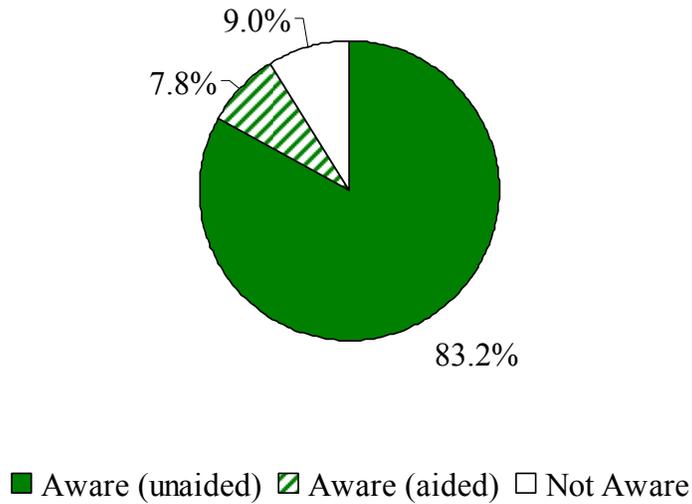


Figure 3a: Total Checkoff Awareness

Q1. Other than the letter you may have received about this survey, have you ever heard of the \$1-per-head Beef Checkoff program? Q2. The Beef Checkoff is the program in which beef producers pay one dollar per head each time they sell cattle. This money is then used for beef promotion and research. Now, do you recall having heard about this Beef Checkoff?

2.3 Informed about the Beef Checkoff program

Self-reports of being informed about the program were only moderate. Only one in five respondents felt very well informed.

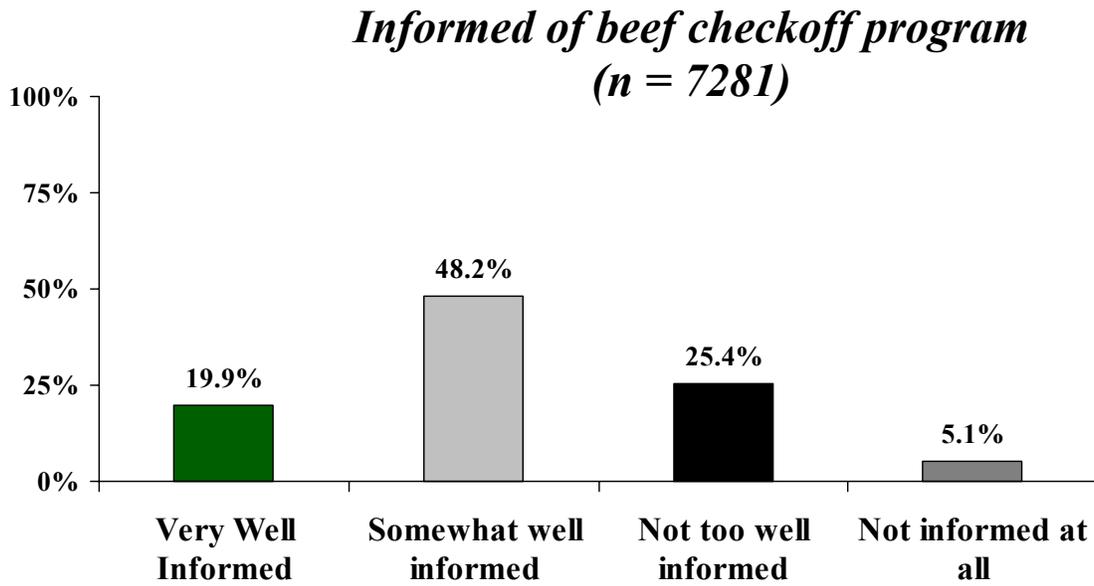
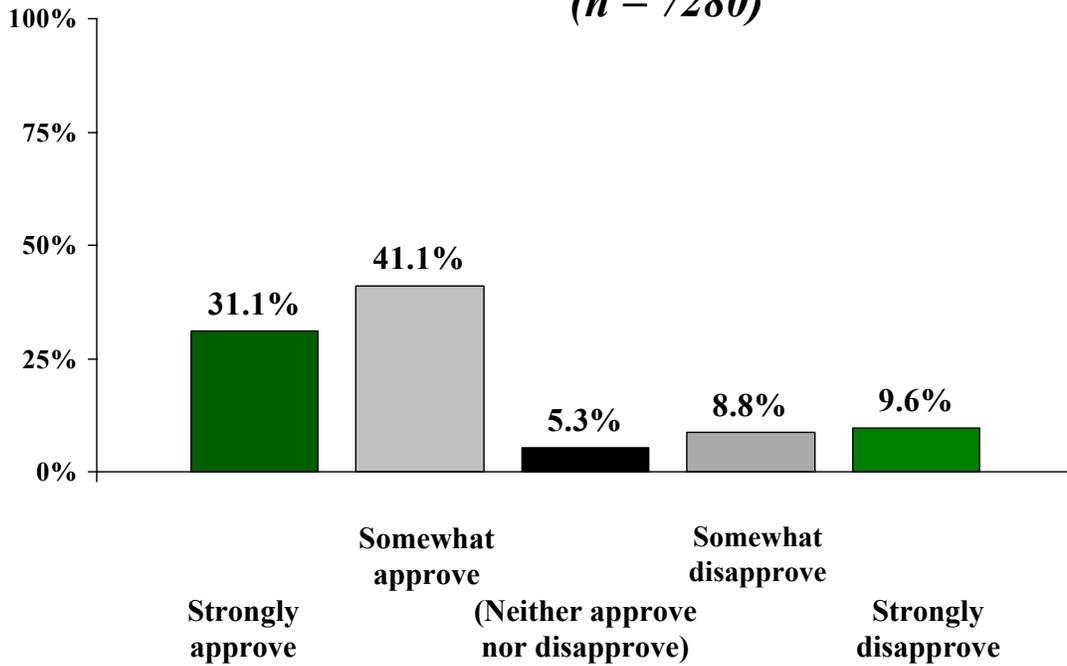


Figure 4: Very well informed / Somewhat well informed / Not too well informed / Not informed at all
Q1a/Q3. Which of the following best describes how well informed you feel you are about the Beef Checkoff program?

2.4 Approval of Beef Checkoff program

Although the self-reported level of being informed about the program is only moderate, approximately, one in three strongly approve of the program.

Approval of beef checkoff program (n = 7280)



Question 4: Overall, do you approve or disapprove of the Beef Checkoff program? Note: 4.1% DK/Refused

Figure 5: Strongly approve / Strongly disapprove

2.5 Reasons for approval or disapproval of the Beef Checkoff program

The main reasons for approval of the program are that it helps the industry, is good marketing, helps with sales, educates and keeps prices up. Those who disapprove of the program feel that it doesn't do enough and too much money is spent on it.

<i>Question 5: Why do you feel that way?</i>	Total	Strongly Approve of Beef Checkoff Program	Strongly disapprove-disapprove of Beef Checkoff Program
Total	6982	2267	1335
Has helped promote beef to consumers	23.3%	44.8%	0.8%
Does good things/I approve/It's needed/Helps industry	11.4%	19.2%	0.7%
Good/does advertising/marketing	9.7%	18.7%	1.2%
Money not spent right	7.1%	0.9%	17.2%
Not enough INFORMATION about programs or spending	6.4%	0.6%	9.6%
Checkoff doesn't work/bad results/waste of money	5.9%	0.5%	21.6%
(DK)	5.6%	1.5%	2.5%
Don't know enough about it (n-s)	4.7%	0.2%	2.9%
Helps with sales/the market/exports	4.0%	7.9%	0.4%
Educates and/or informs	3.6%	8.0%	0.3%
It is MANDATORY, not voluntary/optional	3.4%	0.6%	10.6%

Keep prices up/increasing	3.4%	6.5%	0.1%
Has increased beef demand	3.3%	6.9%	0.1%
Doesn't help small producer, farmer, dairy producer	3.1%	0.4%	9.0%
Don't know how much good it does/if it is worth the cost ..	2.9%	0.1%	4.1%
Salaries too high, too much spent on salaries, bureaucracy	2.9%	0.5%	8.2%
Doesn't benefit me	2.8%	0.2%	10.6%
Goes for research and development	2.6%	5.8%	0.1%
Is a good value for the money	2.4%	5.2%	0.1%
Has improved the profitability of my operation	2.3%	4.3%	0.1%
It's an expense, I need the money	2.2%	0.3%	5.8%
Benefits packers/middlemen/retailers/big business	1.9%	0.5%	5.2%
Checkoff is too high	1.7%	0.3%	4.3%
Reallocate the checkoff--\$1 paid one time	1.5%	0.0%	3.9%
Don't want to/shouldn't have to pay/Don't like to pay/Pay ..	1.5%	0.0%	5.5%
Advertising is bad	1.4%	0.4%	3.3%
Not enough advertising	1.2%	0.5%	1.8%
Producers couldn't afford to promote beef on their own	1.2%	2.2%	0.1%
Is well managed	1.2%	2.3%	0.1%
Helps with disease control/quality of meat	1.0%	2.2%	0.1%
Some good - some bad/can improve or do more	1.0%	0.1%	0.2%
Everyone pays	0.9%	1.7%	0.1%
Doesn't LISTEN to producers	0.9%	0.2%	2.7%
Hasn't helped the price	0.8%	0.1%	2.1%
Packers should contribute	0.7%	0.2%	1.8%
Producers have a voice in how the money is spent	0.6%	1.3%	0.2%
(Refused)	0.6%	0.3%	0.6%
Not accountable (GENERAL)	0.6%	0.2%	0.7%
Bad management (GENERAL)	0.5%	0.0%	1.3%
Not very expensive	0.5%	0.9%	0.0%
Unnecessary, no need	0.4%	0.3%	1.3%
Good for tracking/history/records	0.3%	0.2%	0.1%
Accountability-Other (list)	0.1%	0.0%	0.1%

Table 1

Q5. Why do you approve or disapprove of the Beef Checkoff Program?

2.6 Changes or Improvements to Program

Those who approve of the program do not have a lot of changes to suggest, but they would like to see more advertising and more accountability of where the money is spent. For those who disapprove, some feel strongly about eliminating it altogether, while others would like to see the same changes as those who approve (mainly more advertising and program financial accounting).

Question 6: Regardless of whether you approve or disapprove of the Beef Checkoff program, what changes or improvements, if any, would you like to see made to the program?	Total	Strongly Approve of Beef Checkoff Program	Strongly disapprove-disapprove of Beef Checkoff Program
Total	7280	2267	1335
(DK)	33.8%	28.1%	22.5%

(No changes)	28.6%	43.8%	11.4%
More advertising	7.7%	8.5%	7.6%
Provide more info about how money is spent	4.6%	2.5%	7.3%
Eliminate it	3.7%	0.3%	18.4%
Educate consumers	2.6%	3.2%	2.4%
Better advertising	2.5%	2.1%	3.4%
More information shared with producers/better communication	2.4%	1.7%	2.5%
Manage the money better	2.1%	1.0%	4.7%
More accountability	1.6%	1.0%	2.7%
Represent local/small producers	1.4%	0.7%	1.9%
(Refused)	1.4%	0.7%	1.6%
Make participation voluntary/optional	1.3%	0.4%	4.6%
Less spent on administration, salaries	1.1%	0.7%	2.5%
More local control	1.1%	0.9%	2.2%
Promote better beef/dairy prices	1.1%	0.6%	1.0%
More research	1.0%	1.5%	1.0%
Help build foreign/new markets for beef	1.0%	1.0%	1.0%
Checkoff dollars may only be used to promote beef from cattle	0.9%	0.7%	1.4%
More regulation of foreign markets	0.9%	0.4%	1.6%
Don't charge multiple times on same animal	0.9%	0.5%	1.6%
Packers, retailers, importers should pay	0.9%	0.5%	1.6%
Lower the checkoff amount	0.8%	0.3%	1.7%
Raise the checkoff above \$1 per head	0.8%	1.9%	0.2%
Structure of checkoff should be reorganized/payed based on..	0.7%	0.3%	1.3%
Periodic vote on the checkoff program	0.7%	0.4%	1.6%
More emphasis on health and safety	0.6%	0.6%	0.9%
Improve/create animal ID program	0.5%	0.7%	0.7%
More equality in program	0.5%	0.4%	0.7%
Allow proportional representation of national cattle org	0.5%	0.5%	0.8%
Raise proportion of checkoff fundsgoing to state org	0.2%	0.4%	0.0%
Provide label showing place where cow came from	0.1%	0.1%	0.1%

Table 2

Q6. Regardless of whether you approve or disapprove of the Beef Checkoff program, what changes or improvements, if any, would you like to see made to the program?

2.7 Activities Beef Checkoff is currently involved in

A large percentage of the respondents did not know what the Checkoff program does and this was of course greater for those who felt that they were “not informed”. Of all respondents the most widely held view of the Beef Checkoff program’s activities, is that it is foremost an advertising effort and secondarily, it promotes US beef exports.

7. To the best of your knowledge, what type of activities is the Beef Checkoff currently involved in? (1st response only)	Total	Among those who are Informed	Among those who are Not Informed
	7242	4942	2206
Advertising beef to consumers	47.3%	53.3%	34.5%
(Don't Know)	29.7%	20.6%	49.3%

Promoting U.S. beef exports	5.5%	6.5%	3.3%
Other (list)	1.6%	1.7%	1.4%
Research (Probe:) For what purpose?	1.4%	1.8%	0.6%
National Animal ID program	1.1%	1.0%	1.2%
Developing new beef products	1.1%	1.3%	0.5%
Promotions with grocery stores, displays	1.0%	1.2%	0.6%
Promotions with restaurants	0.9%	1.1%	0.5%
Increasing consumer demand for beef	0.9%	1.0%	0.6%
Educating consumers that beef is nutritious	0.8%	0.9%	0.6%
Collecting Money	0.8%	0.6%	1.2%
Educating consumers that beef is safe	0.8%	1.0%	0.3%
Recipes	0.7%	0.8%	0.5%
Lobbying elected officials about governmental policies and...	0.7%	0.8%	0.3%
Keeping prices up	0.6%	0.6%	0.6%
Countering negative press about beef, handling activists, ...	0.6%	0.5%	0.8%
Sales of Beef/Cattle	0.6%	0.5%	0.6%
Education (Probe:) For what purpose?	0.5%	0.7%	0.2%
(Refused)	0.4%	0.4%	0.4%
Research to improve beef quality	0.4%	0.5%	0.2%
Educational programs for children	0.4%	0.4%	0.2%
Helps Farmers/Ranchers	0.3%	0.3%	0.4%
Cook Off	0.3%	0.4%	0.1%
Quality Assurance/Control	0.3%	0.4%	0.2%
Research to improve beef safety	0.3%	0.3%	0.2%
Beef (non-spec)	0.2%	0.2%	0.3%
Cookbook-The Healthy Beef Cookbook	0.2%	0.2%	0.1%
Opening or closing borders to cattle, beef trade	0.2%	0.2%	0.1%
Research to show the nutritional benefits of beef	0.2%	0.2%	0.0%
Promotions at Fairs	0.2%	0.2%	0.1%
Meeting/Banquets (non-spec)	0.1%	0.1%	0.1%
Putting beef on restaurant menus	0.1%	0.1%	0.0%
Keeping us informed (non-spec)	0.1%	0.1%	0.0%

Table 3

Q7. To the best of your knowledge, what type of activities is the Beef Checkoff currently involved in? (1st response only)

2.8 Issues or problems facing the beef industry that the Beef Checkoff should address

At least two out of five respondents felt the checkoff program was addressing all of the issues and problems facing the beef industry that it should. Many others didn't know/couldn't list any issues. Of those who listed issues, national animal ID, Mad Cow Disease/BSE and too much imported beef were mentioned most often.

8. In your opinion, are there any issues or problems facing the beef industry that you feel the Beef Checkoff should address, but isn't currently? (1st response only)	Total	Among those who are Informed	Among those who are Not Informed
	7280	4965	2221
No	43.8%	45.7%	40.0%
(DK)	16.6%	13.2%	23.8%
National Animal ID	6.8%	6.9%	6.6%
Mad Cow Disease or BSE (in general)(Bovine Spongiform Enc...	5.6%	5.8%	5.1%

Other (list)	3.3%	3.3%	3.0%
Too much imported beef	3.2%	2.9%	4.0%
Need more markets	1.7%	2.0%	1.2%
Country of origin labeling (COOL)	1.7%	2.0%	0.9%
Food safety-E-coli	1.6%	1.7%	1.5%
More advertising	1.5%	1.4%	1.7%
Low price of cattle	1.4%	1.3%	1.8%
Closed export markets or borders	1.4%	1.7%	0.7%
Unfair market practices/competition	1.2%	1.2%	1.0%
Educate consumers	1.0%	1.0%	0.9%
Cost of production(feed, fuel, fertilizer)	0.9%	0.9%	0.9%
More information about program, where is money spent	0.9%	0.9%	0.8%
Program should benefit smaller producers,not packers, ret...	0.8%	0.8%	0.9%
Too much regulation/government intervention/NAFTA	0.8%	0.8%	0.7%
Environmental issues	0.6%	0.7%	0.4%
Better advertising, promote tothe right audience	0.6%	0.6%	0.4%
(Refused)	0.5%	0.6%	0.4%
Quality/consistency of beef	0.5%	0.5%	0.5%
Drought/weather problems	0.5%	0.4%	0.6%
More regulation of foreign markets	0.5%	0.6%	0.3%
Negative media, bad press	0.5%	0.6%	0.1%
Lobbying/influencing government/more active	0.4%	0.5%	0.4%
Work for a more stable beef market	0.4%	0.4%	0.3%
Accountability/more government involvement	0.4%	0.4%	0.3%
Animal rights activists/PETA/vegetarians	0.3%	0.3%	0.2%
More research	0.2%	0.2%	0.1%
High retail price of beef	0.2%	0.2%	0.2%
Steroids/hormones/questionable feed	0.2%	0.1%	0.3%
Profitability	0.1%	0.1%	0.1%
Oversupply of beef, increasing supplies	0.1%	0.1%	0.1%
New products, recipes	0.0%	0.0%	0.0%

Table 4

Q8. In your opinion, are there any issues or problems facing the beef industry that you feel the Beef Checkoff should address, but isn't currently?

2.9 Who controls the Beef Checkoff program

There is no broad consensus in any groups surveyed as to who controls the program. Only two-thirds of those who feel informed venture a response and half of those who don't feel informed ventured any response. The USDA is the most mentioned as in control, with NCBA, CBB and producers following. Of those who disapprove, one in five feel the USDA is in charge.

Q9. In your opinion, who do you think controls the Beef Checkoff program?	Total	Informed	Not Informed	Approve	Disapprove
Total	7280	4713	1859	5261	1335
(DK)	40.0%	34.1%	51.5%	38.1%	41.3%
Government/USDA	15.6%	14.1%	18.1%	13.6%	22.5%
NCBA, National Cattlemen's Beef Association	10.3%	12.3%	6.8%	11.7%	6.9%
CBB, Cattlemen's Beef Board(aka Beef Board, Beef Promotion...	6.3%	8.3%	2.6%	7.5%	3.1%

Producers (Probe:)	5.2%	6.5%	2.9%	6.3%	1.9%
Packers	4.5%	5.0%	4.0%	3.8%	7.6%
Board of directors, directors	3.7%	4.6%	2.0%	4.2%	2.7%
Large producers, corporations	2.4%	2.1%	3.2%	1.8%	4.6%
Beef Checkoff board, management	2.4%	2.9%	1.5%	2.5%	2.6%
Cattle Producers	2.4%	2.9%	1.1%	2.8%	1.4%
National Beef Council (Probe:)Do you mean Beef Board or NCBA	2.3%	2.9%	1.2%	2.7%	1.3%
Farmers/Ranchers	2.3%	2.5%	1.8%	2.7%	0.9%
State Beef Council/Beef Council	1.8%	2.2%	1.1%	2.1%	0.8%
State cattle association	1.6%	2.0%	0.8%	1.9%	0.4%
Beef Industry/Cattle Industry	1.3%	1.4%	0.9%	1.5%	0.9%
Board (non-spec)	1.3%	1.5%	0.8%	1.3%	1.2%
Committee/Council/Commission (non-spec)	1.1%	1.4%	0.5%	1.3%	0.7%
Feeders, feedlots	1.1%	1.2%	1.0%	1.1%	1.1%
All types of producers	1.1%	1.4%	0.3%	1.3%	0.2%
No one	1.0%	0.9%	1.1%	0.9%	1.3%
State (non-spec)	0.9%	0.9%	0.9%	1.0%	0.7%
Processors	0.6%	0.6%	0.6%	0.5%	1.0%
Elected Officials	0.6%	0.7%	0.3%	0.7%	0.4%
Agriculture Department	0.6%	0.6%	0.7%	0.6%	0.4%
Consumers	0.6%	0.6%	0.2%	0.7%	0.1%
Marketing/Advertising	0.4%	0.4%	0.5%	0.4%	0.5%
(Refused)	0.4%	0.3%	0.4%	0.3%	0.6%
National Livestock Producer's Association	0.3%	0.4%	0.3%	0.4%	0.3%
Beef People (non-spec)	0.3%	0.3%	0.2%	0.3%	0.0%
Buyers	0.3%	0.3%	0.3%	0.3%	0.4%
Farm Bureau	0.2%	0.2%	0.1%	0.2%	0.1%
Specific types of producers (list)	0.2%	0.2%	0.1%	0.2%	0.1%
Retailers	0.1%	0.2%	0.1%	0.1%	0.1%
Stock Yards	0.1%	0.1%	0.2%	0.2%	0.0%
Middleman	0.1%	0.1%	0.1%	0.1%	0.3%
American Beef Council	0.1%	0.1%	0.1%	0.1%	0.1%
Beef Commission	0.1%	0.1%	0.2%	0.0%	0.1%
Everyone	0.0%	0.0%	0.1%	0.1%	0.0%

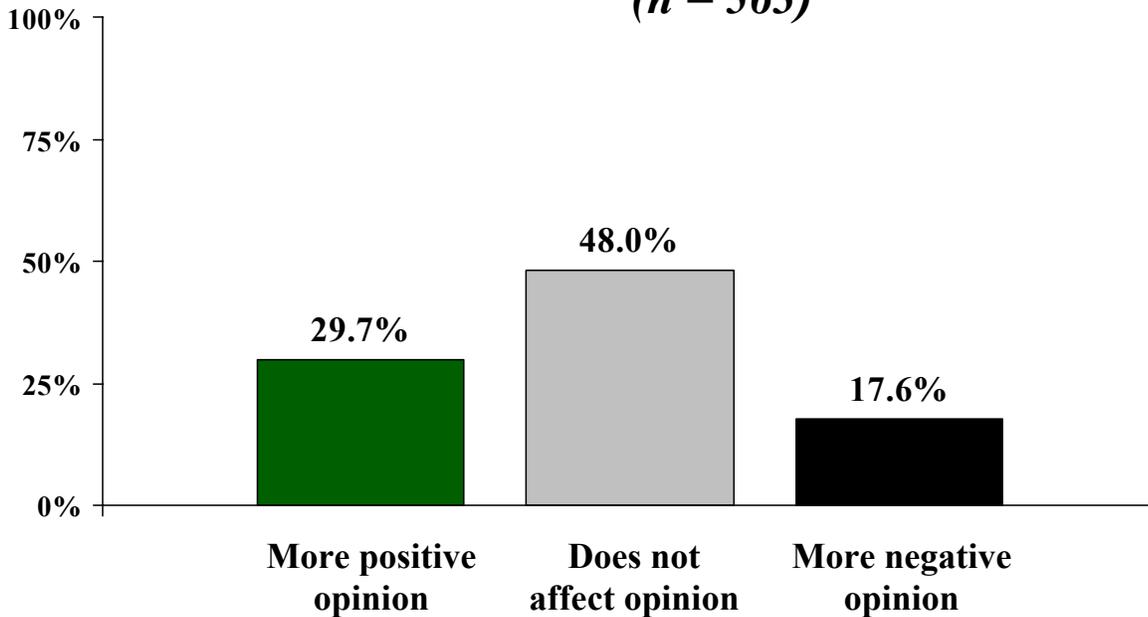
Table 5

Q9. In your opinion, who do you think controls the Beef Checkoff program?

2.10 NCBA's Involvement Affecting Opinions

When asked about NCBA's involvement in the program, the majority do not see the NCBA's involvement affecting their opinions. However, those who do see NCBA's involvement as affecting their opinion of the program are more inclined to be positive than negative about the involvement.

***NCBA's Involvement Affecting Opinions
(n = 563)***



Question 10: How, if at all, does NCBA's involvement in the program affect your opinion about the checkoff?

Figure 6

Q10. How, if at all, does NCBA's involvement in the program affect your opinion about the checkoff?

2.11 Approval of allowing any organization to conduct Beef Checkoff programs

Approval is more widespread than disapproval for allowing any organization to contract to conduct Checkoff funded programs, with 44% approving versus 35% disapproving and 14% giving no opinion at all. However, strong disapproval is greater than strong approval for this concept.

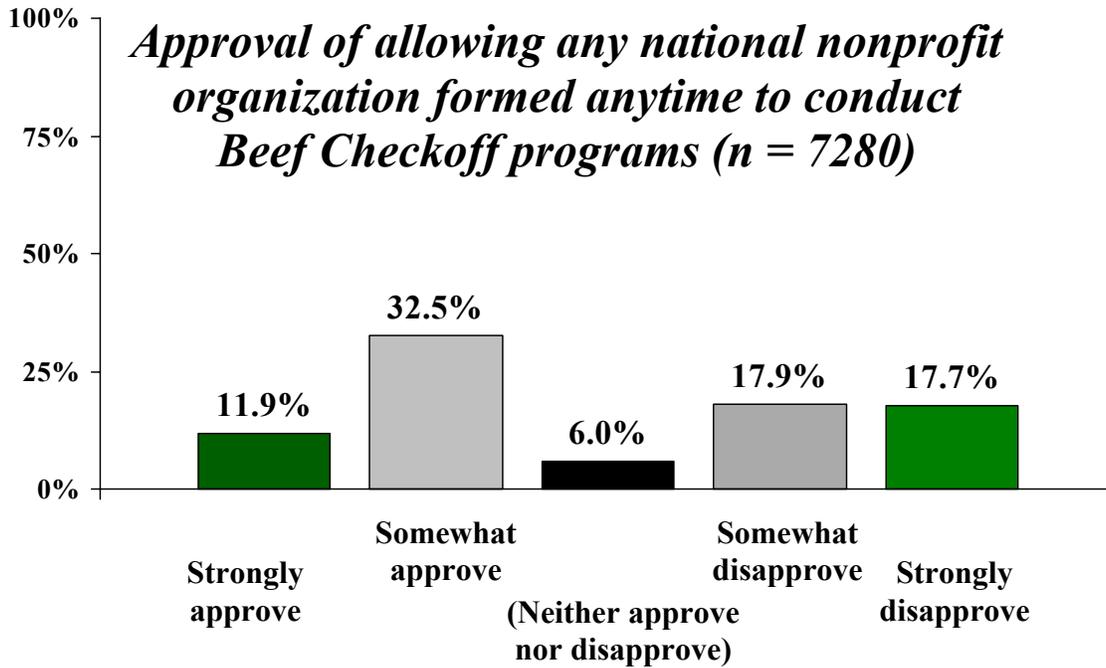


Figure 7

Q11. When the Beef Checkoff Program was established the original leaders wanted to use existing resources. So, current rules allow only national, non-profit, beef industry-governed organizations that were in existence before 1986 to contract directly with the Beef Board to conduct national checkoff funded programs. Would you approve or disapprove of allowing any such organization, regardless of when they were formed, to conduct Beef Checkoff programs?

2.12 Approval of allowing Beef Board to contract with ANY eligible entity

Two thirds of the respondents would approve of any entity to contract directly with the Beef Board and less than one quarter would disapprove.

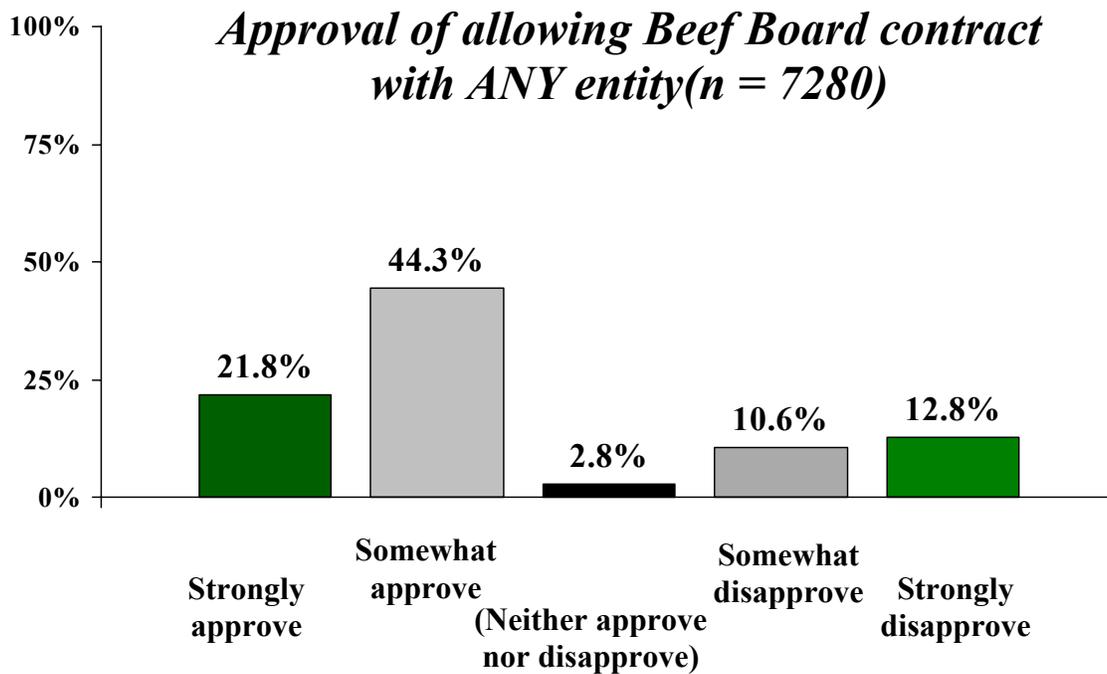


Figure 8

Q12. Again, to make use of existing resources, the Beef Board is required to contract through national, non-profit, beef industry-governed organizations to conduct national checkoff funded programs. It has been suggested that the Beef Board be allowed to contract directly with ANY entity, including businesses, University researchers, advertising and marketing agencies, and other consultants. Would you approve or disapprove of allowing the Beef Board to contract directly with ANY eligible entity, such as those previously mentioned?

2.13 Level of agreement with following statement: “If it were possible, all or at least some portion of Beef Checkoff dollars should be used to promote ONLY U.S. born and raised beef.”

Over three quarters of the respondents were in strong agreement with having the Beef Checkoff dollars being used to only promote US beef. This was the most strongly endorsed statement in the survey.

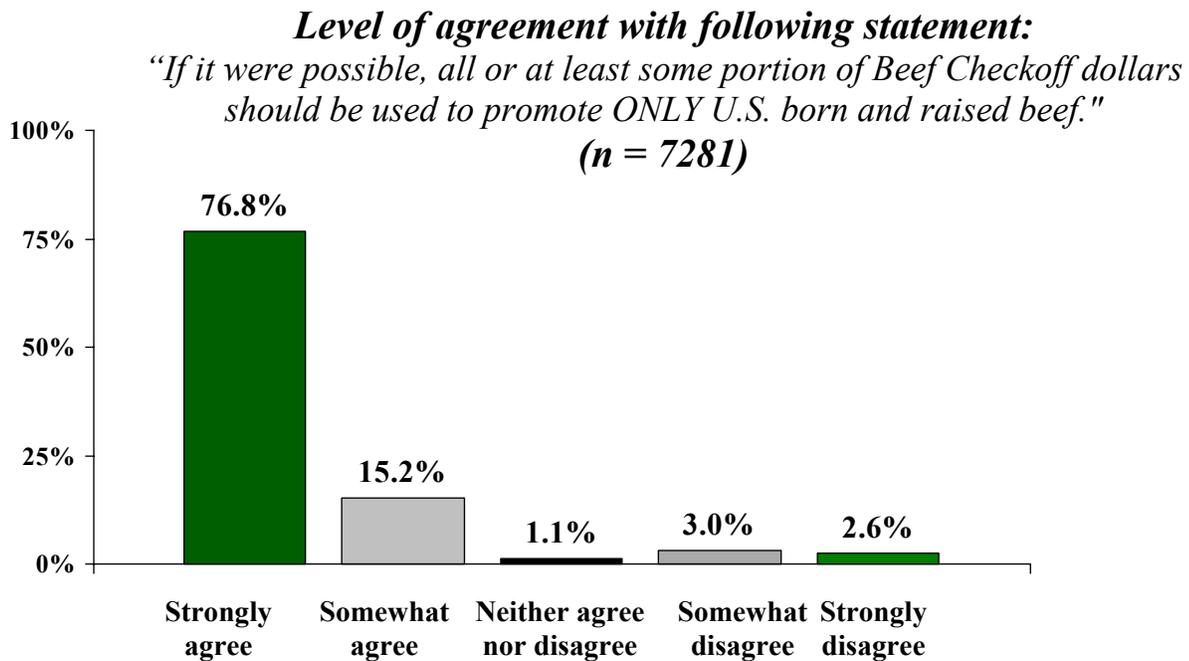


Figure 9

Q13. Do you agree or disagree with the following statement: "If it were possible, all or at least some portion of Beef Checkoff dollars should be used to promote ONLY U.S. born and raised beef."

2.14 Level of agreement with using all or a portion of Beef Checkoff dollars to promote only U.S. born and raised beef

When informed that the Checkoff dollars being only used for US beef would mean a reduction in the assessment on beef importers, the level of agreement with the focus on only US beef diminished from the initial levels of agreement.

Level of agreement with using all or a portion of beef checkoff dollars to promote only U.S. born and raised beef if it means importers would not pay (n = 7281)

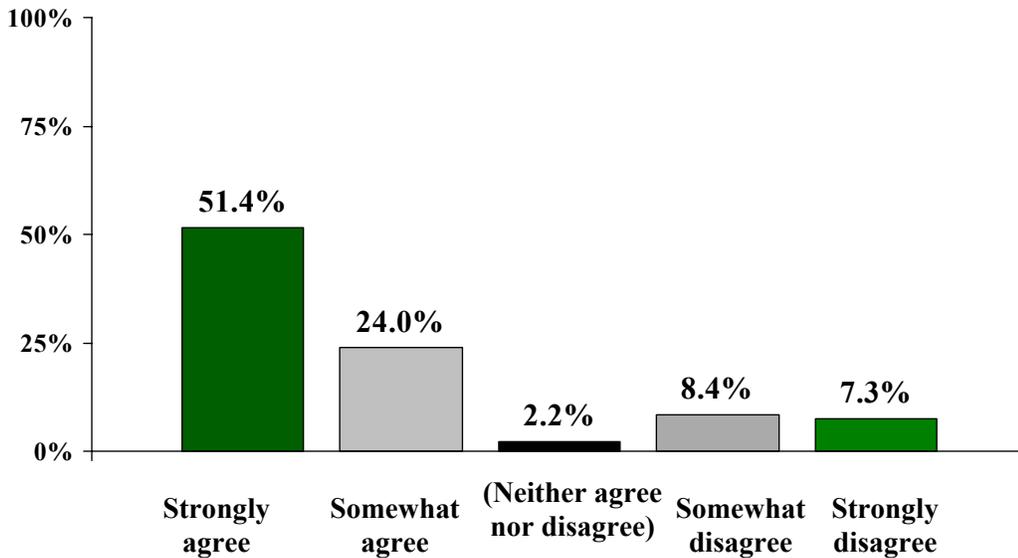


Figure 10

Q14. Using all or a portion of beef checkoff dollars to promote ONLY U.S. born and raised beef would mean that the checkoff assessment on beef importers would have to be reduced or eliminated--what would you say? Would you NOW say that you agree or disagree with using all or a portion of beef checkoff dollars to promote only U.S. born and raised beef?

2.15 Percent of cattle sold that the \$1 Beef Checkoff is being paid on

Overall, the majority of respondents feel that the Beef Checkoff is being paid on 90% or more of the cattle sold. The average percentages do not vary a great deal between groups.

15. Based on what you have seen or heard, what percent of the cattle sold would you say that the \$1 Beef Checkoff is being paid on?	Total	Informed	Not informed	Approve	Disapprove
Total	4910	3648	1220	3695	894
<70%	18.17%	15.65%	25.57%	17.92%	17.34%
70<80%	10.39%	10.75%	9.34%	11.15%	7.05%
80<90%	10.43%	11.43%	7.79%	11.56%	6.94%
90%+	61.02%	62.17%	57.30%	59.38%	68.68%
Mean	83.30	83.00	79.73	83.10	84.84
Standard Deviation	22.94	28.45	26.52	22.18	24.69

Table 6

Q15. Based on what you have seen or heard, what percent of the cattle sold would you say that the \$1 Beef Checkoff is being paid on?

2.16 Funding Level

Over three quarters of respondents feel that the funding of the Checkoff program should remain the same, with only a small percentage saying the amount should increase. This is driven largely by whether or not producers approve of the Checkoff. Those who approve seek little change, while over half of those who disapprove want a decrease. Those who consider themselves informed are similar to those who are uninformed, however they are somewhat more likely to be in favor of an increase and less likely to want a decrease.

Opinions regarding changes to the \$1-per-head beef checkoff amount (n = 7281)

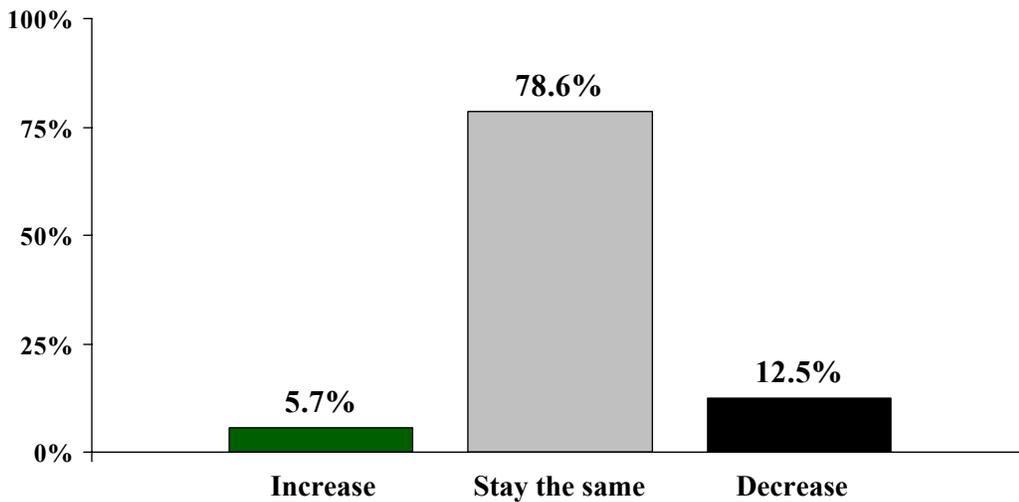


Figure 11
Question 16: In your opinion, should the \$1-per-head Beef Checkoff amount increase, decrease or stay the same?

Opinions regarding changes to the \$1-per-head beef checkoff amount by checkoff approval

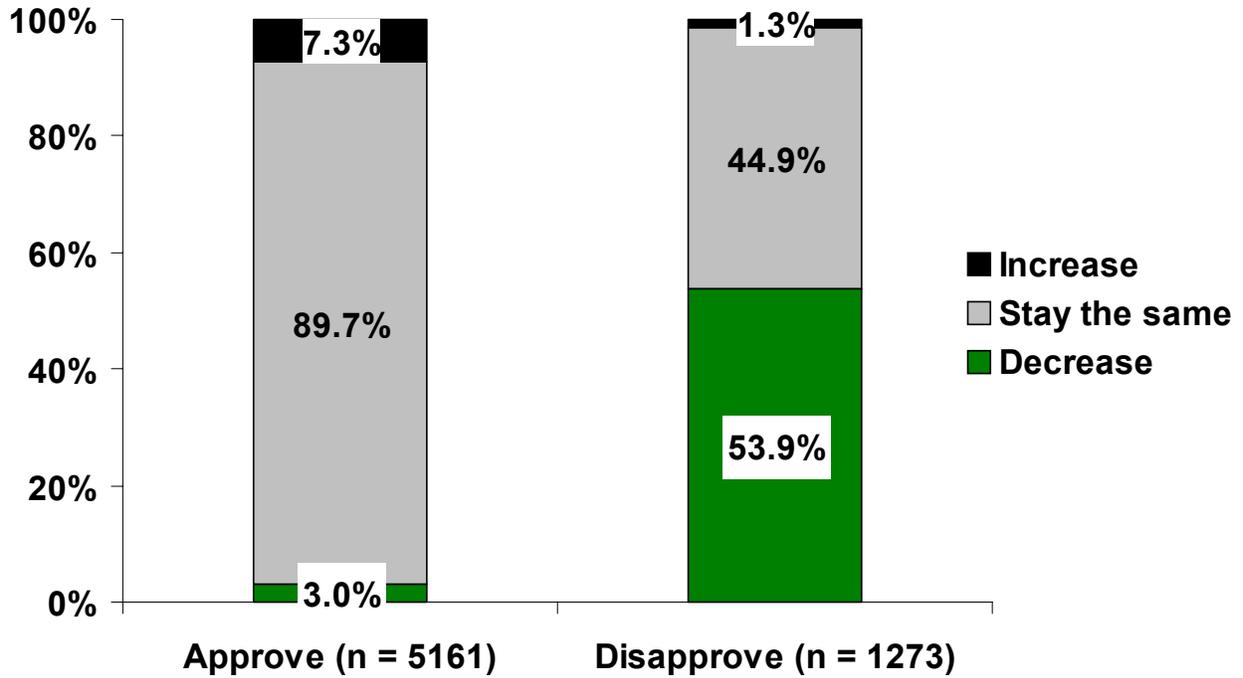


Figure 11a

Question 16: In your opinion, should the \$1-per-head beef checkoff amount increase, decrease or stay the same?

Opinions regarding changes to the \$1-per-head beef checkoff amount by informed of checkoff

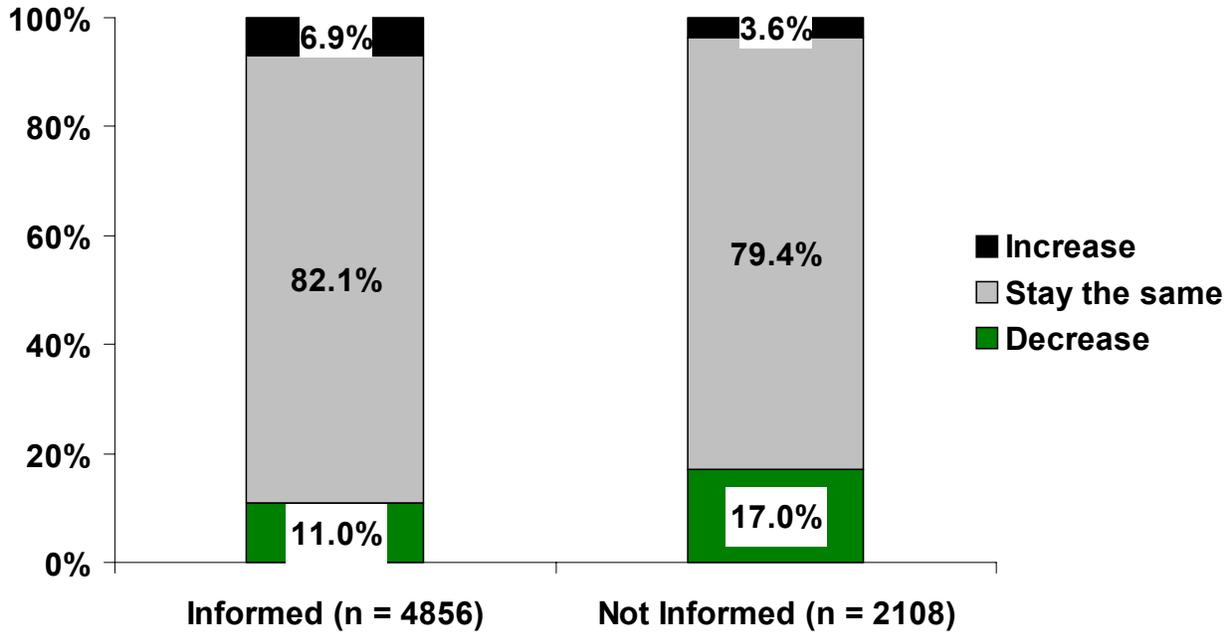


Figure 11b

Question 16: In your opinion, should the \$1-per-head beef checkoff amount increase, decrease or stay the same?

2. 17 Assessment Structure

Over half the respondents felt that the flat fee per head each time an animal is sold should be the basis of the checkoff dollars collected. When looking at preferences by those who approve and disapprove of the program, those who approve were over twice as likely to want the flat per head fee to be the means of assessment, while those who disapprove of the program were twice as likely to want a one-time flat fee at the point of slaughter.

17. In your opinion, what should Beef Checkoff assessment rate be based on? Do you think it should be based on a flat per head fee eachtime an animal is sold, a one-time flat fee at the point of slaughter, a percent of calue of the animal each time it is sold, a variable fee adjusted periodically for inflation, or something else?	Total	Informed	Not Informed	Approve	Disapprove
	7281	4965	2221	5261	1335
Flat per head fee each time an animal is sold	51.7%	54.4%	46.3%	59.5%	27.0%
One-time flat fee at point of slaughter	28.3%	27.9%	29.6%	24.7%	40.4%
(Don't Know)	6.7%	5.2%	9.5%	5.1%	8.6%
Percent of the value of the animal each time it is sold	4.0%	3.8%	4.4%	4.1%	3.1%
Variable fee adjusted periodically for inflation	3.1%	3.0%	3.4%	3.4%	2.5%
Eliminate it/Get rid of it/Make it voluntary	2.3%	2.1%	2.8%	0.2%	11.4%
Flat fee/One time fee	1.1%	1.1%	1.0%	1.1%	1.3%
(Refused)	0.8%	0.6%	0.9%	0.3%	2.1%

Keep it the same	0.7%	0.8%	0.5%	0.7%	0.7%
Something else (list)	1.3%	1.1%	1.6%	0.9%	2.8%

Table 7

Q17. In your opinion, what should the Beef Checkoff assessment rate be based on? Do you think it should be based on a flat per head fee each time an animal is sold, a one-time flat fee at the point of slaughter, a percent of value of the animal each time it is sold, a variable fee adjusted periodically for inflation, or something else?

2.18 Referendum

Half of the respondents were very likely to vote to continue the Beef Checkoff program and three quarters were at least somewhat likely to vote in favor of continuing the program if a referendum were to be held. Over 90% of those who approve of the program would be likely to vote to continue the Checkoff versus only 22% of those who disapprove. More than 80% of those who felt informed would vote to continue the Checkoff, while 60% of those who felt uninformed would vote to continue. Not surprisingly, there is a correlation between likelihood to vote in favor of continuing the program and preferred changes to the program fees.

Approximately the same percentage would approve (strongly and somewhat) to have periodic voting on the continuation of the program as would be likely to continue the checkoff. Those who approve of the checkoff are somewhat more likely to approve of voting periodically on continuing it. Support for periodic votes was unrelated to how well informed people felt they were about the checkoff. There was also no clear directional relationship between the preferred checkoff amount and whether people wanted to vote periodically on continuing the program.

**Likelihood to vote to continue the \$1-per-head checkoff program
(n = 7281)**

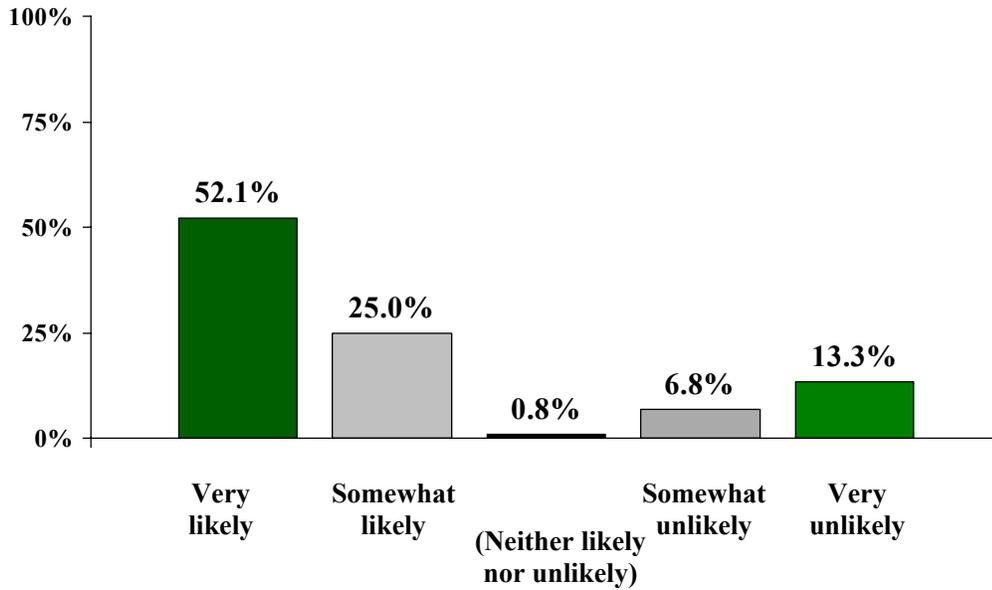


Figure 12
Question 18: If a referendum were held tomorrow on whether or not to continue the \$1-per-head checkoff program, how likely would you be to vote to continue the program?

Likelihood to vote to continue the \$1-per-head checkoff program by approval of checkoff

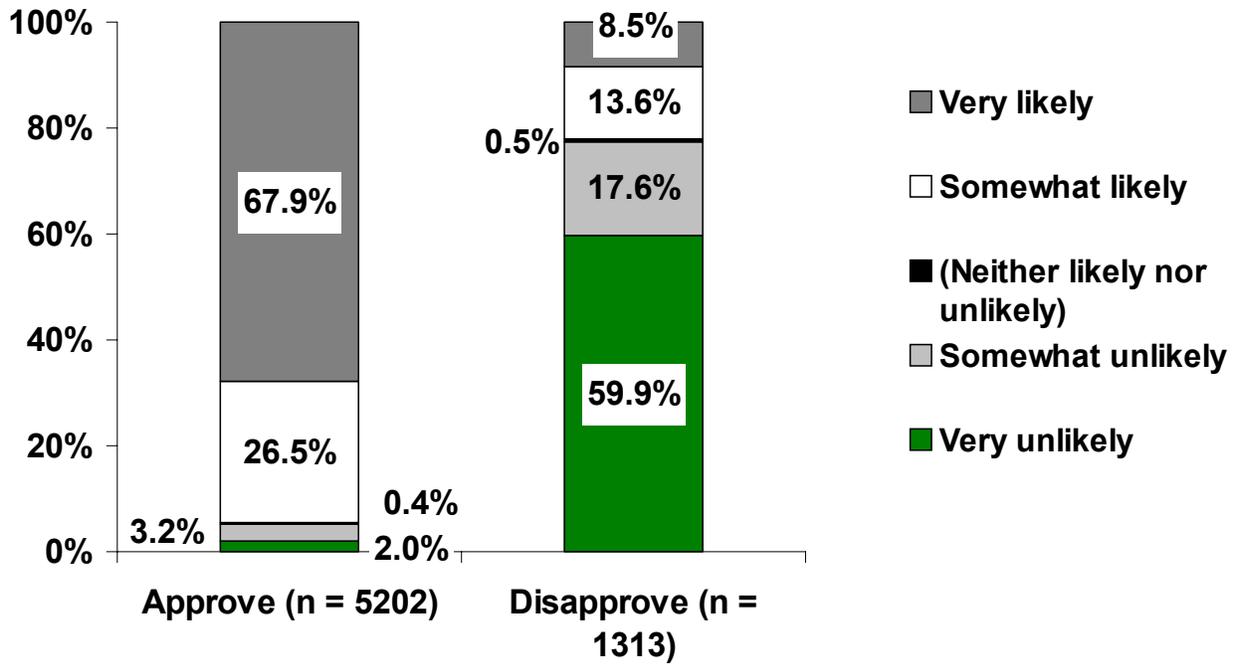


Figure 12a

Question 18: If a referendum were held tomorrow on whether or not to continue the \$1-per-head checkoff program, how likely would you be to vote to continue the program?

Likelihood to vote to continue the \$1-per-head checkoff program by informed of checkoff

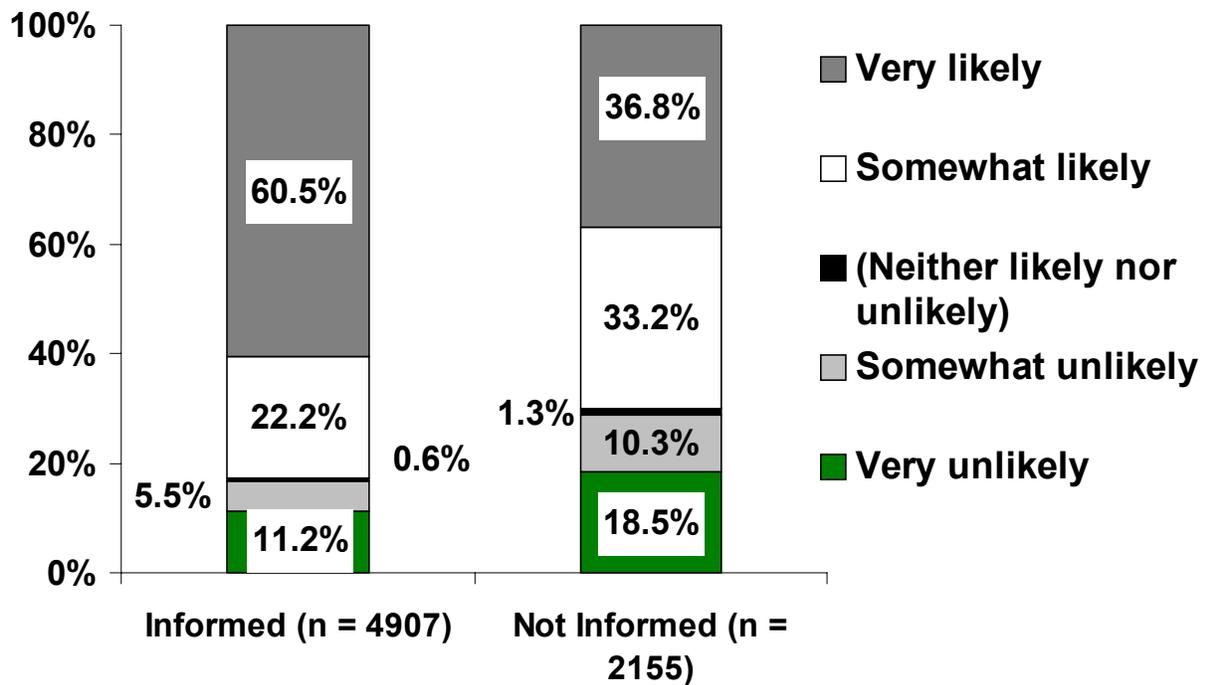
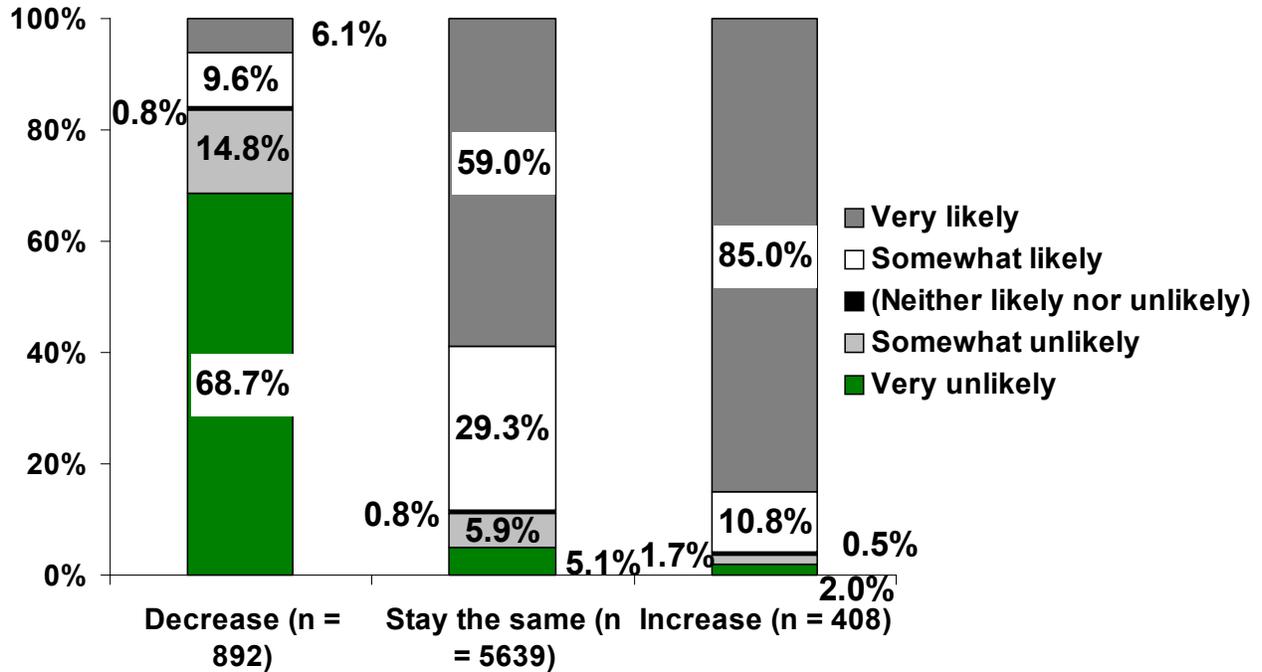


Figure 12b
 Question 18: If a referendum were held tomorrow on whether or not to continue the \$1-per-head checkoff program, how likely would you be to vote to continue the program?

Likelihood to vote to continue the \$1-per-head checkoff program by preferred checkoff amount



Question 18: If a referendum were held tomorrow on whether or not to continue the \$1-per-head checkoff program, how likely would you be to vote to continue the program?

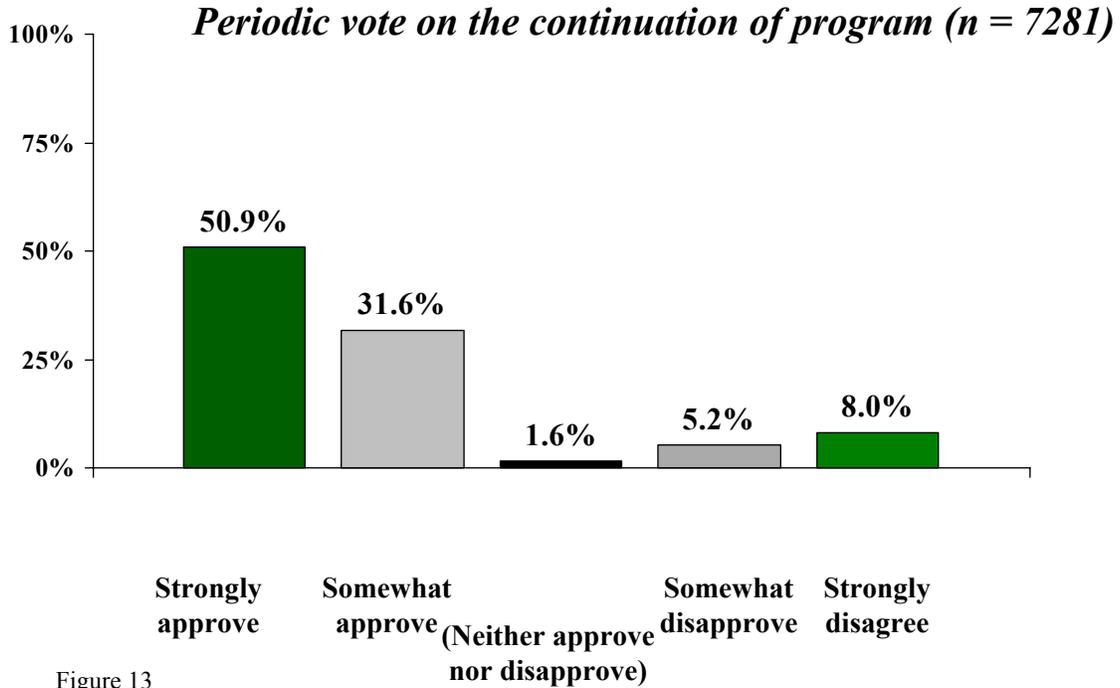


Figure 13
Question 18a. Would you approve or disapprove of voting periodically on the continuation of the Beef Checkoff Program?

Periodic vote on the continuation of program by approval of checkoff

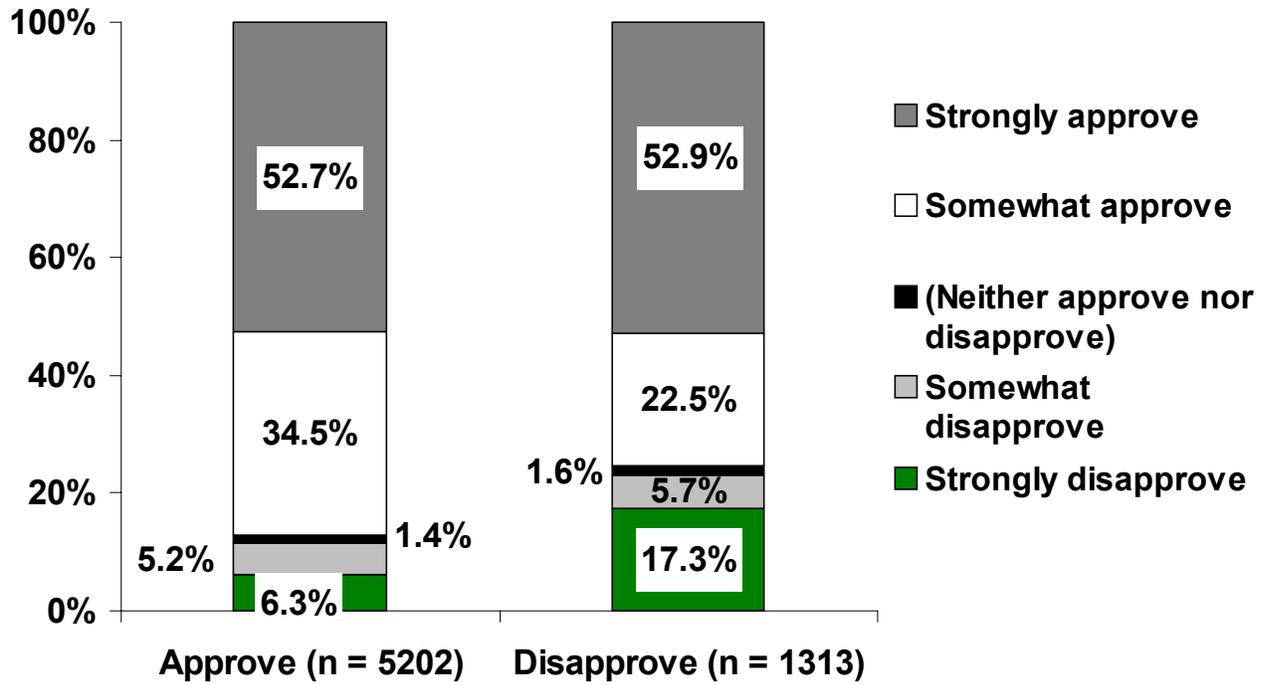


Figure 13a
 Question 18a. *Would you approve or disapprove of voting periodically on the continuation of the beef checkoff Program?*

Periodic vote on the continuation of program by informed of checkoff

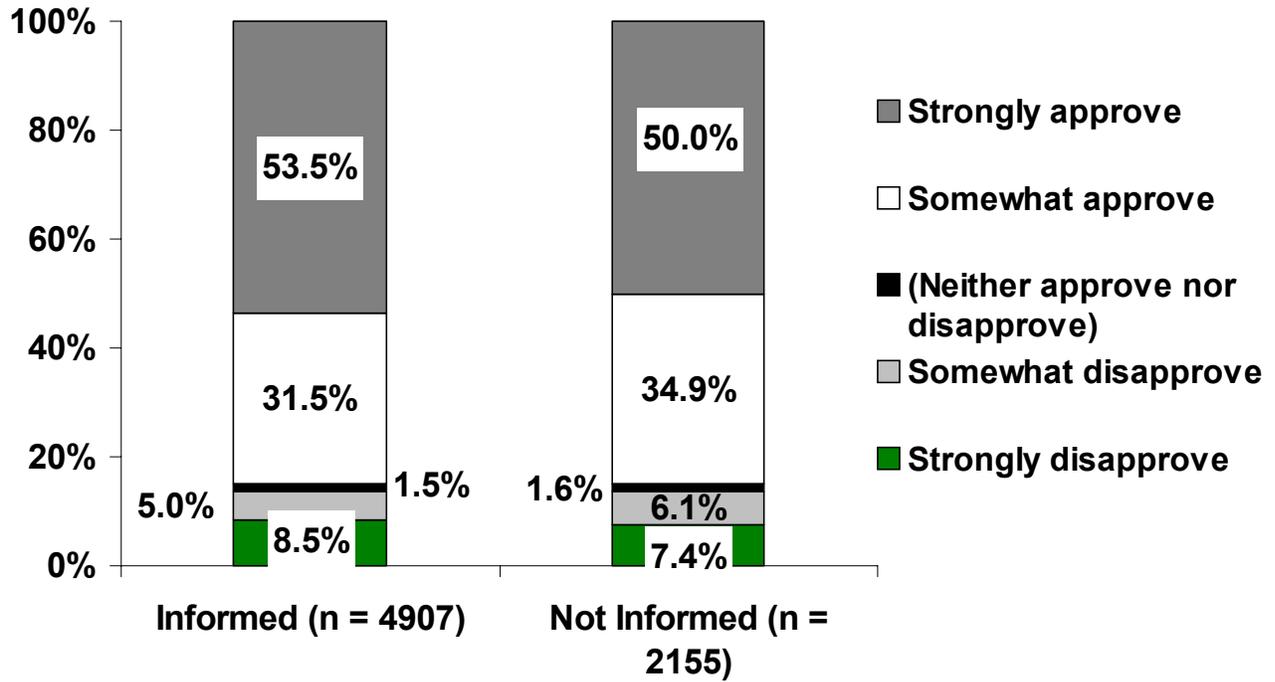


Figure 13b
 Question 18a. Would you approve or disapprove of voting periodically on the continuation of the beef checkoff Program?

Periodic vote on the continuation of program by preferred checkoff amount

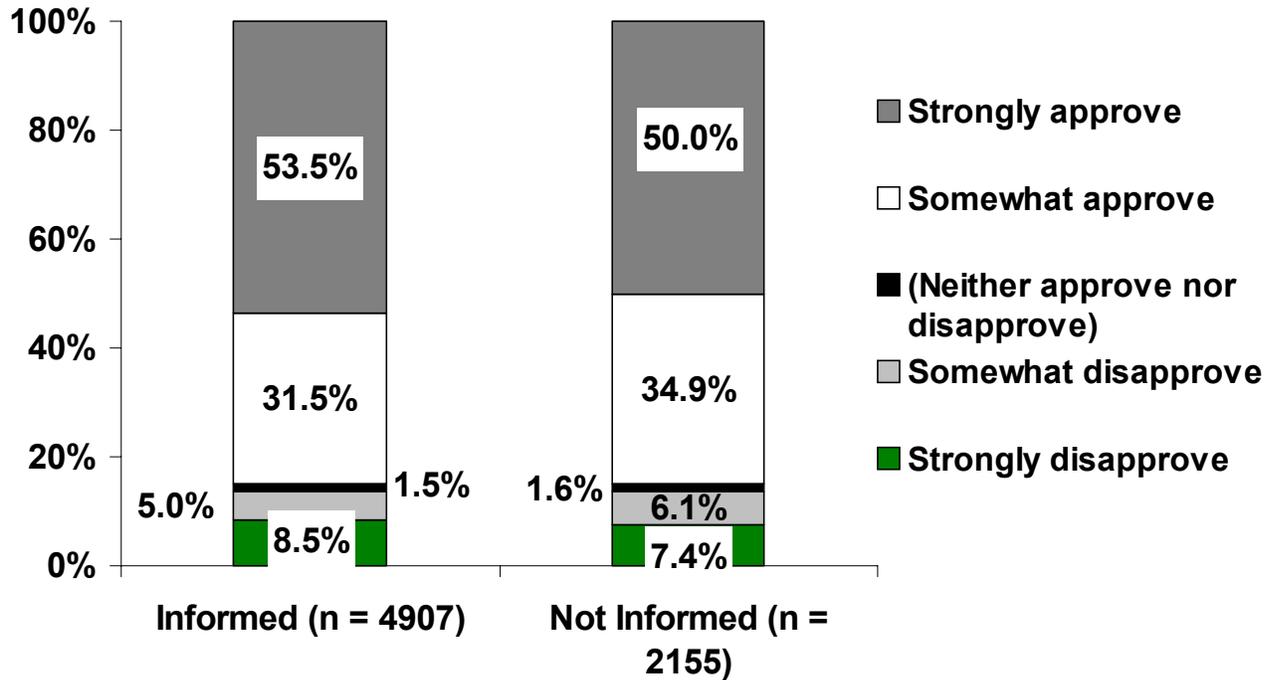


Figure 13c
 Question 18a. Would you approve or disapprove of voting periodically on the continuation of the beef checkoff Program?

2.19 Information sources

Agricultural magazines as a category were the most frequently mentioned source of information to learn about the Beef Checkoff program. Various magazines were mentioned. *Beef Magazine* garnered the most mentions, although no magazine generated even a 2% mention overall.

19. On a different topic, what information sources do you use to learn about the Beef Checkoff program? What do you rely on most? (Open ended and code) (Probe for three responses, 1st of 3) * Overall, do you approve or disapprove of the Beef Checkoff program? (If approve/disapprove, Probe:) Would that be STRONGLY (approve/disapprove) or SOMEWHAT (approve/disapprove)?	Total	Approve	Disapprove	Informed	Not Informed
Agricultural magazines (Probe:)What magazine specifically?	39.7%	41.0%	35.8%	41.1%	35.4%
Agricultural newspapers (Probe:)What newspaper specifically?	5.9%	5.4%	7.8%	5.2%	7.5%
Printed newsletters or other information through the posta...	5.2%	5.2%	4.1%	5.4%	4.9%
Other (list)	4.9%	4.8%	5.3%	5.3%	4.1%
Really don't stay informed about cattle industry	4.3%	3.4%	6.1%	2.5%	9.5%
Television (Probe:) What program specifically?	3.9%	3.9%	3.8%	3.9%	3.8%
Magazines (non-spec)	3.1%	3.1%	2.9%	3.0%	3.2%
Beef Council, cattle association, or cattle organization m...	3.0%	3.4%	1.7%	3.6%	1.7%
Radio (Probe:) What program specifically?	2.4%	2.4%	2.7%	2.4%	2.3%
Word of Mouth	2.2%	2.0%	2.9%	1.9%	3.1%
Farm Magazines	2.0%	2.1%	2.1%	1.9%	2.4%

Sale Barn	2.0%	1.4%	4.3%	1.9%	2.7%
Other cattlemen	1.9%	1.9%	2.0%	1.5%	2.8%
Internet, Online Chat Rooms or E-mail	1.7%	1.6%	2.2%	1.7%	1.6%
Cattleman's Association	1.6%	1.8%	0.9%	1.9%	0.9%
Farm Journal	1.4%	1.4%	1.4%	1.3%	1.6%
Newspapers (non-spec)	1.3%	1.2%	1.7%	1.3%	1.5%
Beef Magazine	1.2%	1.2%	1.2%	1.3%	0.7%
Farm Papers/Publication	0.9%	0.9%	0.7%	0.9%	1.0%
Extension service or extension meetings	0.8%	1.0%	0.6%	0.9%	0.6%
Publications(non-spec)	0.8%	0.8%	0.5%	1.0%	0.2%
General farm organization meetings	0.7%	0.7%	0.4%	0.8%	0.3%
Farm Bureau	0.6%	0.7%	0.4%	0.7%	0.7%
Media	0.6%	0.6%	0.9%	0.7%	0.4%
Progressive Farmer	0.6%	0.7%	0.2%	0.6%	1.0%
Newsletters (non-spec)	0.6%	0.6%	0.7%	0.6%	0.4%
Advertisements (non-spec)	0.6%	0.5%	0.9%	0.7%	0.3%
Periodicals (non-spec)	0.5%	0.6%	0.7%	0.6%	0.5%
Trade Magazines	0.5%	0.6%	0.5%	0.5%	0.5%
Own Knowledge	0.5%	0.5%	0.9%	0.7%	0.2%
Market Reports	0.5%	0.5%	0.7%	0.5%	0.5%
Electronic newsletters or other information through e-mail	0.5%	0.5%	0.6%	0.5%	0.4%
News (non-spec)	0.3%	0.4%	0.0%	0.3%	0.3%
Cattle Magazine	0.3%	0.3%	0.3%	0.3%	0.3%
Local Newspapers	0.3%	0.3%	0.1%	0.2%	0.4%
Beef Today	0.2%	0.3%	0.1%	0.2%	0.2%
County Agent	0.2%	0.2%	0.2%	0.2%	0.3%
Successful Farming	0.2%	0.2%	0.4%	0.2%	0.3%
Drovers Journal	0.2%	0.2%	0.1%	0.2%	0.2%
Livestock Magazines/Papers (non-spec)	0.2%	0.2%	0.2%	0.3%	0.1%
Stock Yards	0.2%	0.2%	0.2%	0.2%	0.2%
USDA	0.2%	0.2%	0.2%	0.2%	0.3%
High Plains Journal	0.1%	0.1%	0.1%	0.1%	0.1%
Journals (non-spec)	0.1%	0.1%	0.1%	0.2%	0.0%
Beef Board	0.1%	0.1%	0.0%	0.1%	0.0%
Farmer Stockman	0.1%	0.1%	0.0%	0.1%	0.1%
Western Livestock Journal	0.1%	0.1%	0.0%	0.1%	0.1%
Veterinarians	0.1%	0.1%	0.2%	0.1%	0.0%
Angus Journal	0.1%	0.1%	0.1%	0.0%	0.2%
Books (non-spec)	0.1%	0.1%	0.1%	0.1%	0.1%
Capital Press	0.1%	0.1%	0.1%	0.1%	0.1%
Lancaster Farmer	0.0%	0.0%	0.1%	0.0%	0.1%
RFD TV	0.0%	0.0%	0.1%	0.0%	0.1%
Hoards Dairyman	0.0%	0.0%	0.2%	0.0%	0.1%
Livestock Weekly	0.0%	0.1%	0.0%	0.1%	0.0%
Angus Association	0.0%	0.1%	0.0%	0.0%	0.1%

Table 8

Q19. On a different topic, what information sources do you use to learn about the Beef Checkoff program? What do you rely on most? (Open ended and code) (Probe for three responses, 1st of 3) * Overall, do you approve or disapprove of the Beef Checkoff program? (If approve/disapprove, Probe:) Would that be STRONGLY (approve/disapprove) or SOMEWHAT (approve/disapprove)?

2.20 Perceived Support

Three quarters of the respondents felt that the majority of the producers nationwide support the Checkoff program. That was especially true among producers that approved of the Checkoff. Those who are informed are also somewhat more likely to feel the majority of producers support the program.

Level of agreement with following statement:

“The Beef Checkoff program is supported by a majority of the beef producers nationwide.”

(n = 7281)

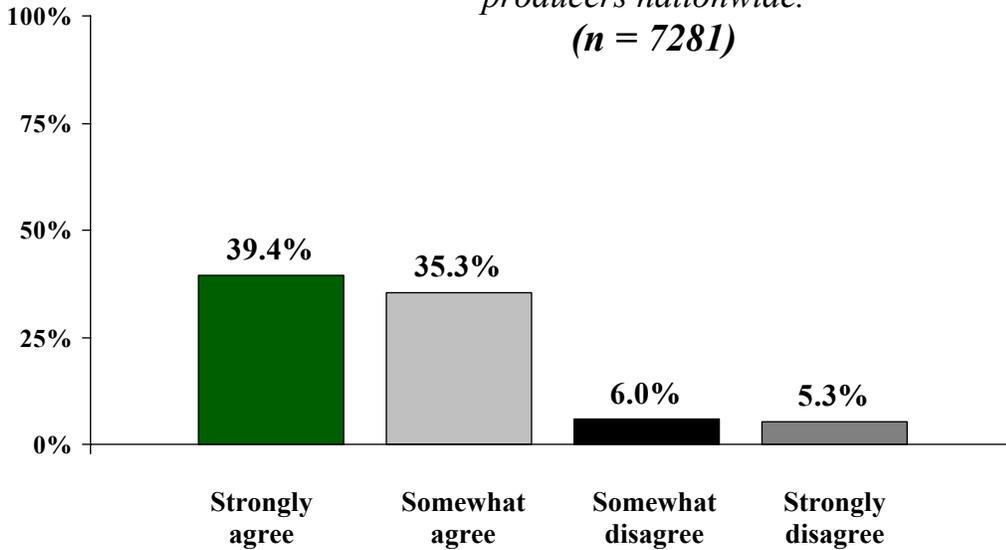


Figure 14

Question 20: Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement. “The Beef Checkoff program is supported by a majority of the beef producers nationwide.:

Checkoff approval by agreement with following statement:
“The beef checkoff program is supported by a majority of the beef

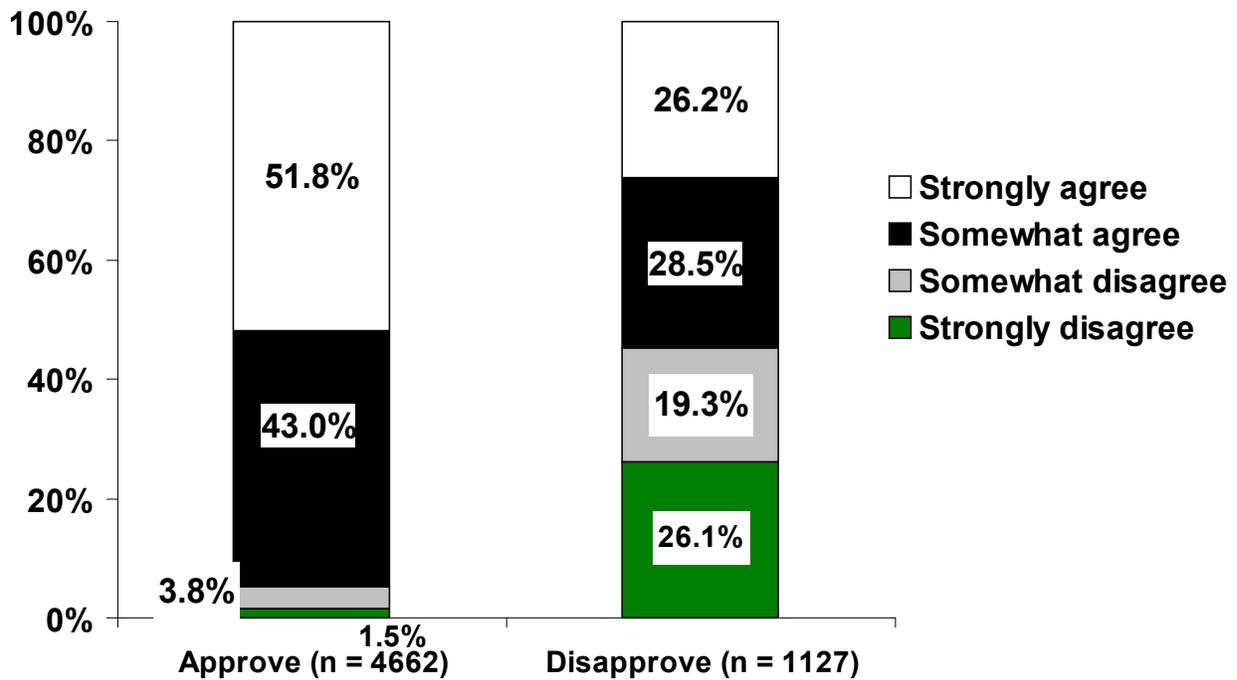


Figure 14a

Question 20: Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement. “The beef checkoff program is supported by a majority of the beef producers nationwide.:

***Informed of checkoff by agreement with following statement:
 “The beef checkoff program is supported by a majority of the beef producers***

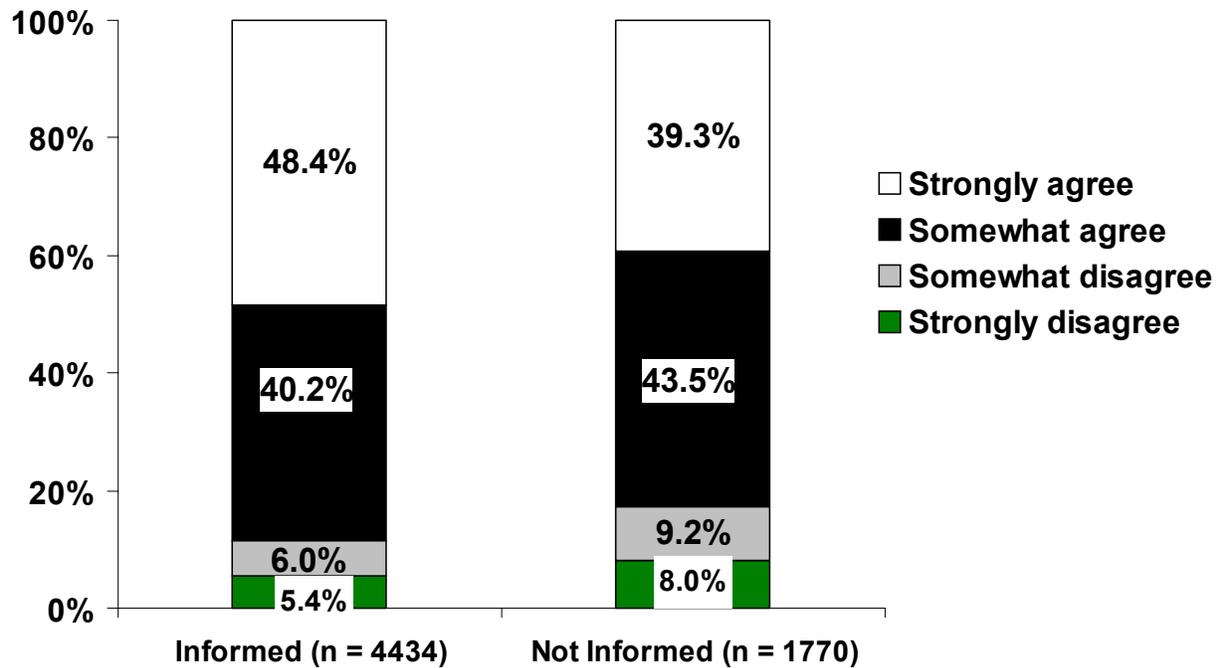


Figure 14b

Question 20: Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement. “The beef checkoff program is supported by a majority of the beef producers nationwide.”

2.21 Producer Demographics

Ninety percent of responding producers were male. Ninety-six percent of respondents were at least 40 years of age, and more than two-thirds were at least 55 years old. About three-quarters of responding producers had between 20 and 249 head of cattle. The most prevalent associations were with the Farm Bureau, and cattleman’s associations at the state, local, and national level. Two-thirds of producers ran commercial cow/calf operations and most had no secondary operation.

Gender of Respondents

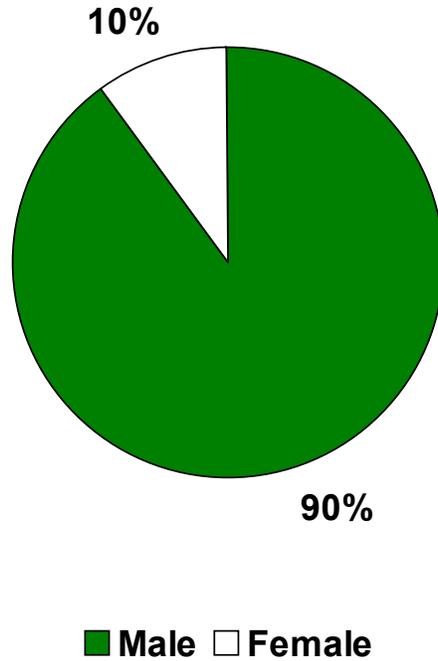


Figure 15
Question D1: Gender (Code only; Do not ask)

Age of Respondents

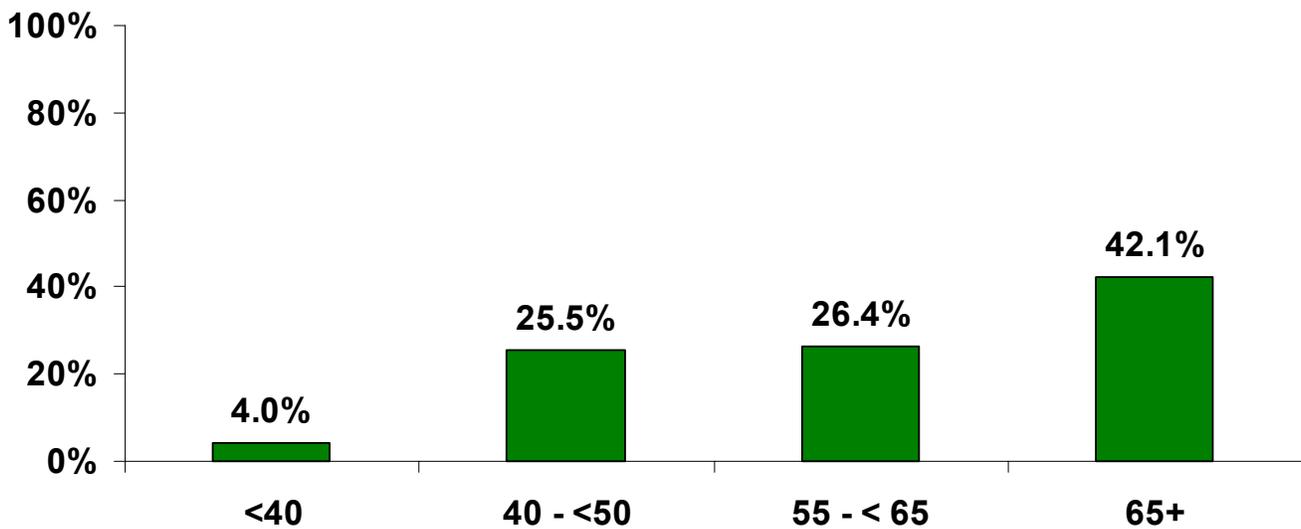


Figure 16 D6: May I ask your age?

Total Size of Operation

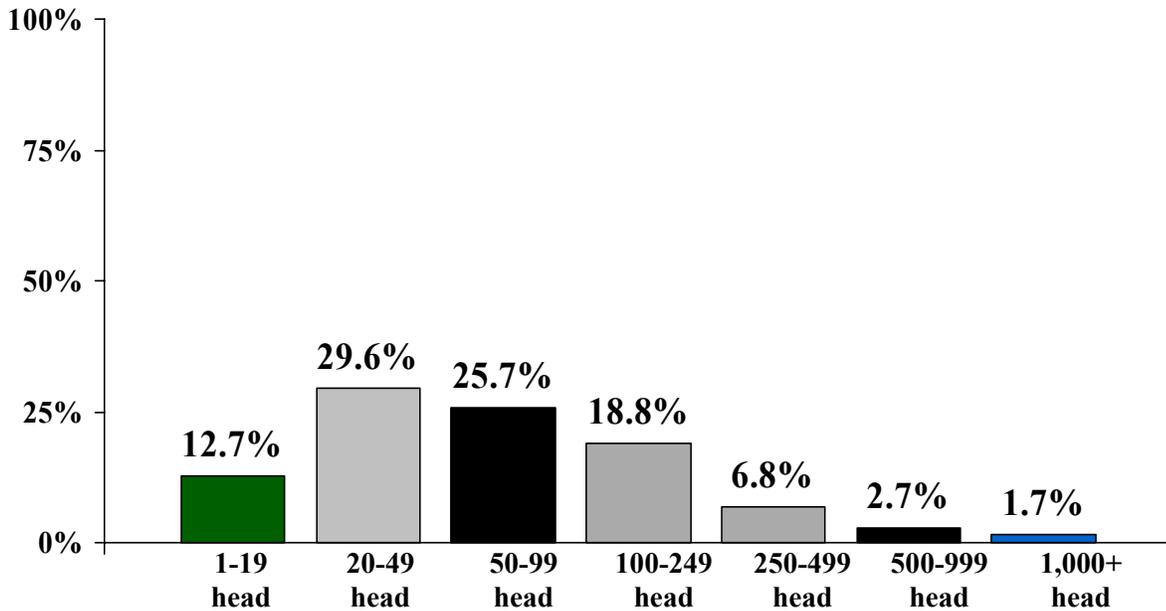


Figure 17
 Question D5: And which of the following categories includes the total number of beef cattle, dairy cows, or veal calves in your operation?

D3. What cattle, dairy, or farm organizations, if any, do you pay dues to belong to?	Total	Approve	Disapprove
	8002	5261	1335
(None)	47.5%	42.1%	50.2%
Farm Bureau	16.2%	18.2%	14.7%
State Cattlemen's Association	12.2%	15.0%	8.0%
Local/county cattlemen's association	3.7%	4.4%	2.1%
Other (list)	2.9%	3.0%	3.0%
National Cattleman's Association	2.1%	2.6%	1.0%
Angus Association	2.0%	2.1%	1.9%
State or local dairymen/dairy association	1.9%	2.1%	1.7%
Cattle Breed Association	1.7%	1.9%	1.6%
Farmers' Union	1.5%	1.6%	2.3%
R-Calf	1.3%	1.0%	3.2%
(DK)	1.1%	0.9%	1.1%
(Refused)	1.0%	0.7%	1.7%
Holstein Association	0.7%	0.7%	1.1%
National Farmers Organization	0.6%	0.5%	1.0%
Dairy Farmers of America	0.5%	0.5%	0.7%
Hereford Association	0.5%	0.4%	0.8%
Dairy Co-ops	0.4%	0.4%	0.9%
Stock Growers	0.3%	0.3%	0.6%
BBU, Beefmaster	0.3%	0.3%	0.3%
Beef Checkoff	0.2%	0.2%	0.4%
AMPI--American Milk Producers Inc, state milk producers	0.2%	0.2%	0.4%

Semmental Association	0.2%	0.2%	0.3%
Farmers Co-ops	0.2%	0.2%	0.4%
Stockman's Association	0.1%	0.2%	0.1%
Limousine Association	0.1%	0.1%	0.1%
Dairy Herd Improvement Association (DHIA)	0.1%	0.1%	0.0%
Corn & Soybean Growers	0.1%	0.1%	0.1%

Table 9

D3. What cattle, dairy, or farm organizations, if any, do you pay dues to belong to?

D4. Which of the following best describes your PRIMARY operation? Is it? <i>Bold = Read to respondent</i>	Total	Approve	Disapprove
	8002	2267	1335
A Commercial cow/calf operation	67.2%	72.2%	62.8%
Dairy production	8.0%	6.0%	12.4%
Farming or feeding	7.3%	5.6%	6.7%
A Stocker operation or backgrounding	3.9%	4.5%	4.5%
Seedstock or Purebred production	3.5%	5.4%	3.7%
A Feedlot operation	2.2%	2.2%	2.3%
Beef cattle/Beef/Cattle/Calves/Steers	1.7%	0.9%	1.3%
(DK)	1.1%	0.4%	0.5%
(Refused)	1.0%	0.5%	1.2%
A Livestock market operation	1.0%	0.8%	1.5%
Hobby/Small farm/Not commercial	0.9%	0.6%	0.4%
Other (list)	0.5%	0.4%	0.9%
Cow/calf operation not commercial	0.4%	0.0%	0.3%
Livestock dealing or order buying	0.3%	0.1%	0.3%
Veal production	0.3%	0.1%	0.3%
Cash crop/Crop farmer/Crops/Row crops	0.2%	0.1%	0.2%
Hay/Hay bailing/Alfalfa	0.1%	0.0%	0.3%
Grain/Wheat/Rice/Barley	0.1%	0.0%	0.2%
Work another job/Non-agricultural or farm	0.0%	0.0%	0.0%
Horses	0.0%	0.0%	0.1%
Cotton	0.0%	0.0%	0.1%
Produce/Fruits/Vegetables (Corn, Soy Beans, etc)	0.0%	0.0%	0.0%
Retired/Semi-retired	0.0%	0.0%	0.1%
Goats	0.0%	0.0%	0.0%
Hogs/Pigs	0.0%	0.0%	0.0%
Poultry	0.0%	0.0%	0.0%
Tobacco	0.0%	0.0%	0.0%
Sheep	0.0%	0.0%	0.0%

Table 10

D4. Which of the following best describes your PRIMARY operation? Is it?

D4a. Do you have a secondary operation?	Total	Approve	Disapprove
	8002	2267	1335
No/No secondary operation	61.9%	59.9%	63.0%
Farming or feeding	12.4%	11.9%	12.0%
Work another job/Non-agricultural or farm	3.2%	3.5%	2.6%
Grain/Wheat/Rice/Barley	2.7%	2.3%	3.4%
A Commercial cow/calf operation	2.6%	3.4%	2.6%
A Stocker operation or backgrounding, OR	2.1%	2.7%	2.1%
Hay/Hay bailing/Alfalfa	1.9%	2.3%	1.0%
Cash crop/Crop farmer/Crops/Row crops	1.5%	1.6%	1.6%

Other (list)	1.4%	1.4%	0.9%
A Feedlot operation	1.3%	1.7%	1.8%
(Refused)	1.2%	0.6%	1.6%
Seedstock or Purebred production	1.0%	1.4%	0.9%
Sheep	0.8%	0.7%	0.8%
Produce/Fruits/Vegetables (Corn, Soy Beans, etc)	0.7%	0.7%	0.7%
Poultry	0.6%	0.9%	0.5%
Hogs/Pigs	0.6%	0.8%	0.7%
Tobacco	0.6%	0.6%	0.4%
(DK)	0.6%	0.6%	0.3%
Beef cattle/Beef/Cattle/Calves/Steers	0.6%	0.5%	0.3%
Timber/Forestry/Logging	0.4%	0.5%	0.2%
Dairy production	0.4%	0.4%	0.6%
Goats	0.3%	0.4%	0.4%
Livestock dealing or order buying	0.2%	0.2%	0.4%
Retired/Semi-retired	0.2%	0.1%	0.3%
Horses	0.2%	0.2%	0.2%
Cotton	0.2%	0.3%	0.3%
A Livestock market operation	0.1%	0.0%	0.0%
Hobby/Small farm/Not commercial	0.1%	0.1%	0.0%
Cow/calf operation not commercial	0.1%	0.2%	0.0%
Veal production	0.1%	0.1%	0.1%

Table 11
 D4a. Do you have a secondary operation?

State	Percent of Interviews
ALABAMA	2.15%
ARKANSAS	3.19%
ARIZONA	0.20%
CALIFORNIA	1.60%
COLORADO	1.70%
CONNECTICUT	0.11%
DELAWARE	0.06%
FLORIDA	1.61%
GEORGIA	1.60%
IOWA	2.39%
IDAHO	1.45%
ILLINOIS	1.69%
INDIANA	1.90%
KANSAS	3.22%
KENTUCKY	5.27%
LOUISIANA	1.16%
MASSACHUSETTS	0.07%
MARYLAND	0.37%
MAINE	0.39%
MICHIGAN	1.40%
MINNESOTA	2.01%
MISSOURI	6.87%
MISSISSIPPI	2.01%
MONTANA	1.66%
NORTH CAROLINA	1.91%
NORTH DAKOTA	1.20%
NEBRASKA	2.22%

NEW HAMPSHIRE	0.06%
NEW JERSEY	0.12%
NEW MEXICO	1.02%
NEVADA	0.12%
NEW YORK	1.91%
OHIO	3.02%
OKLAHOMA	5.92%
OREGON	2.07%
PENNSYLVANIA	3.12%
RHODE ISLAND	0.01%
SOUTH CAROLINA	1.02%
SOUTH DAKOTA	1.71%
TENNESSEE	5.00%
TEXAS	13.75%
UTAH	0.97%
VIRGINIA	2.56%
VERMONT	0.32%
WASHINGTON	1.49%
WISCONSIN	3.80%
WEST VIRGINIA	1.56%
WYOMING	0.96%