



WELCOME

Vegetable and Flower Seed Conference
Communications Committee Meeting
January 25, 2015

Communications Committee

Goals and Objectives

- Helping ASTA Become the Voice of the Industry
 - Coordinate Industry Messaging
 - Build Trust and Understanding of Issues
 - Include Voices from all Members
- Collaborate and Build on Existing Resources
 - Apprise Others of Emerging Issues and Media Interests
 - Share Communications Research and Resources
 - Support Industry Initiatives

Committee Activities

- Messaging Workshop
 - 12 Participants from Various Member Companies
 - Brainstormed Topline Messages
- Communications Summit
 - 25 Attendees
 - Day and a Half Meeting Discussing Strategy
 - Voted for Two Per Year
- CSS 2014 & Seed Expo
 - Over 20 Attendees
 - One Hour Meeting



ASTA Research Survey

n=602 total

n= 200 millennials, n=200 moms, n=202 “food-focused” people

MoE=±3.7% total

MoE=± 6.2% per 200 subgroup

Fielded November 12–18, 2014

- Audience: millennials (n=200), moms (n=200), and food-focused people (n= 202) nationwide
- Respondents were contacted by phone via a live telephone operator interview and through an online survey from November 12th –18th, 2014

Millennial Demographics



Age	Results
18 - 24	22%
25 - 34	78%

Gender	Results
Male	45%
Female	55%

Area	Results
City	42%
Suburban	30%
Small Town	26%

Education	Results
High School or Less	35%
Some College	36%
College Grad	21%
Post Grad	8%

Income	Results
Less than \$25k	24%
\$25k - \$50k	30%
\$50k - \$75k	19%
\$75k - \$100k	13%
More than \$100k	11%

Mom Demographics



Age	Results
18 - 34	26%
35 - 44	27%
45 - 54	31%
55+	44%

Education	Results
High School or Less	20%
Some College	45%
College Grad	26%
Post Grad	9%

Area	Results
City	24%
Suburban	41%
Small Town	36%

Income	Results
Less than \$25k	20%
\$25k - \$50k	30%
\$50k - \$75k	18%
\$75k - \$100k	13%
More than \$100k	16%

Food-Focused Demographics



Age	Results
18 - 54	23%
55 - 64	30%
65 - 74	22%
75 and over	20%

Gender	Results
Male	47%
Female	53%

Area	Results
City	17%
Suburban	32%
Small Town	49%

Education	Results
High School or Less	11%
Some College	31%
College Grad	39%
Post Grad	26%

Income	Results
Less than \$50k	16%
\$50k - \$75k	17%
\$75k - \$100k	18%
More than \$100k	20%

- More than 75% of consumers feel that the role of technology in agriculture is important
- Little appreciation for role of seed in contributing to societal challenges
- When people understand the specific benefits of seed improvement, they begin to show more appreciation
- Education key to consumer appreciation of seed and seed improvement

Overview: All Audiences

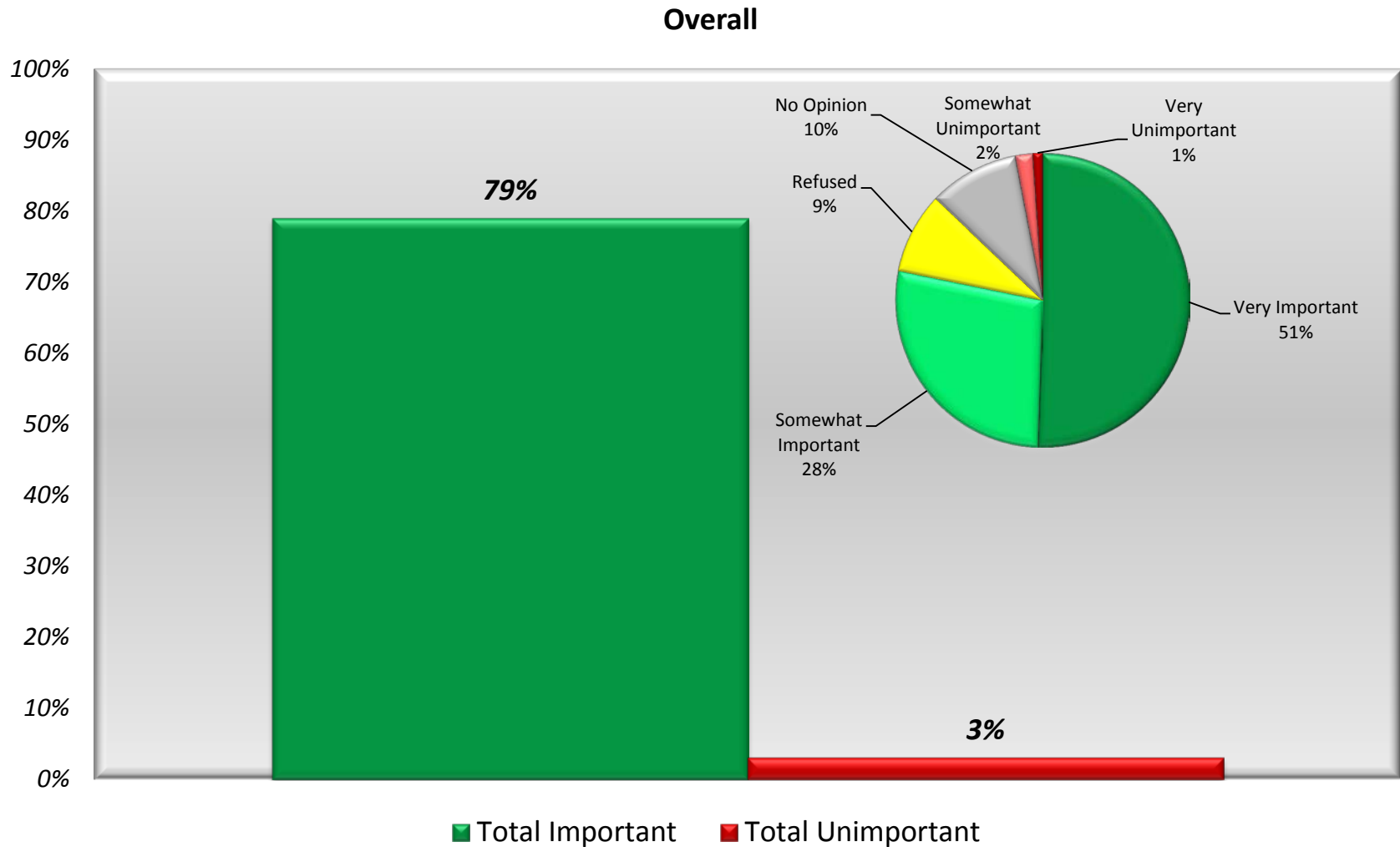
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Overall, four in five believe that the role of technology in agriculture is important.



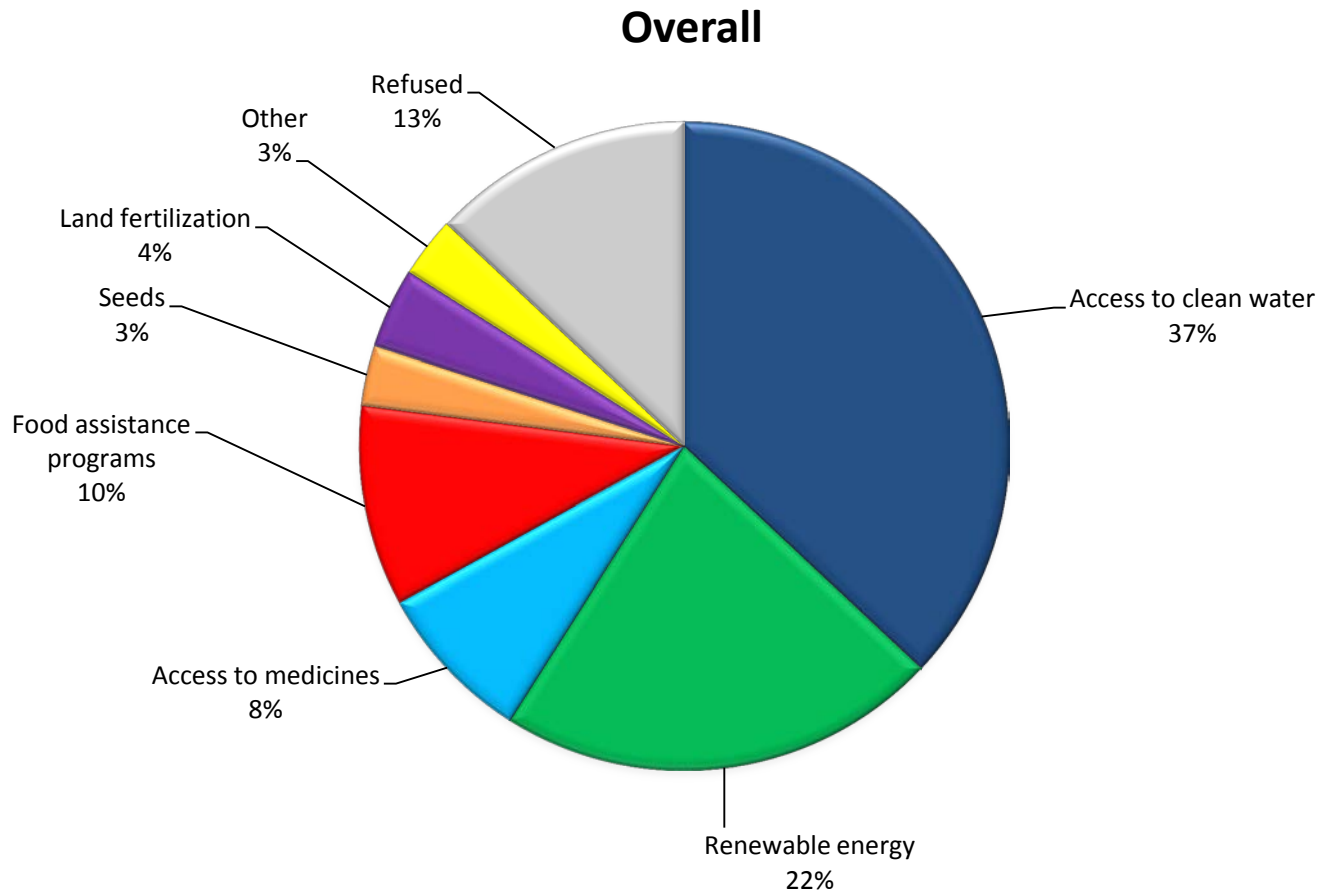
3. And, do you feel that role of technology in agriculture is important or unimportant or do you not have an opinion?



Overall, renewable energy and clean water are believed to be the most useful when it comes to the environment, energy, food, and health issues around the world.



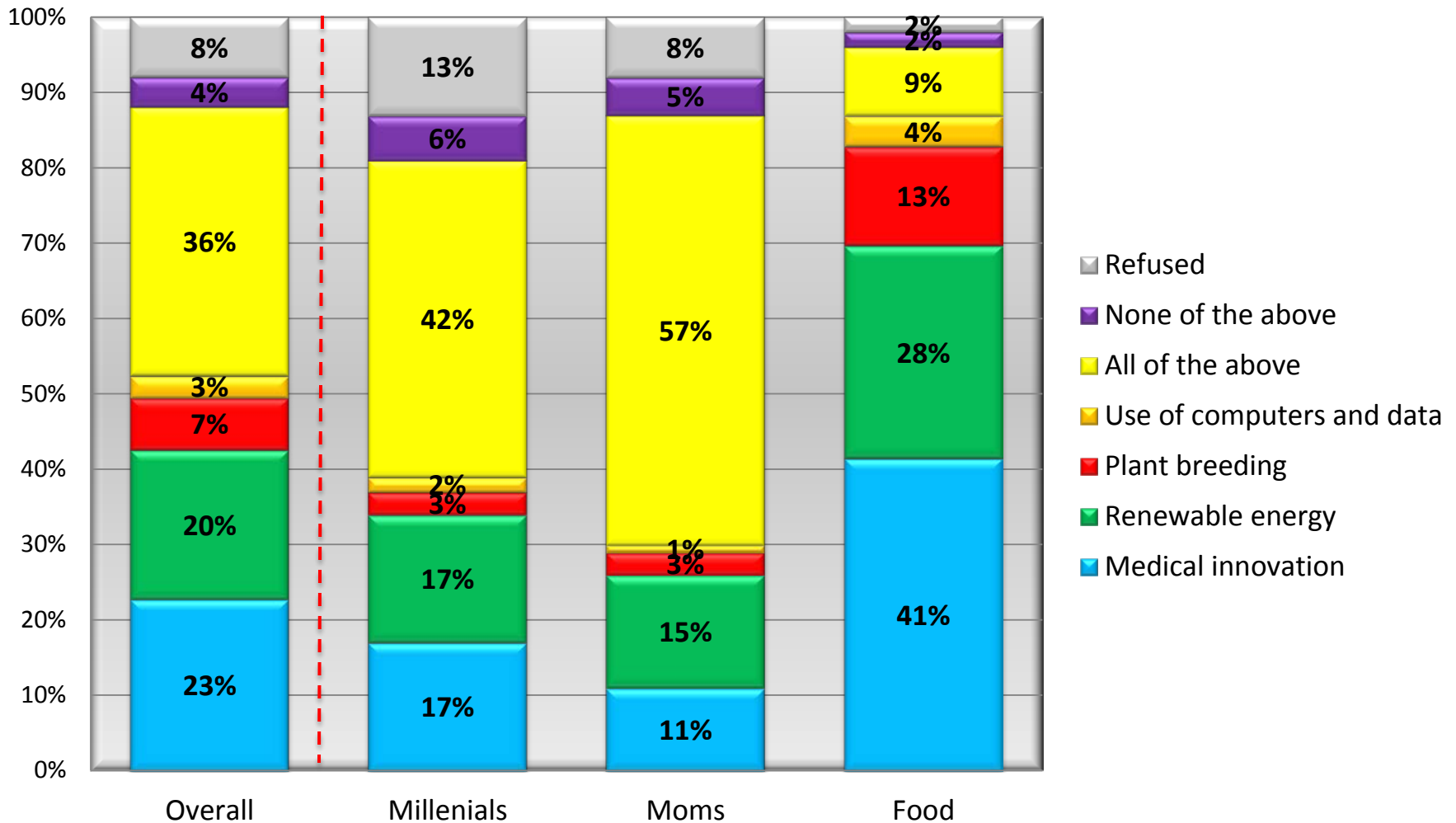
1. First, I am going to read you a list of options for things that help when it comes to the environment, energy, food, and health issues around the world. Which of the following do you think is most useful in helping with these issues?



Medical innovation and renewable energy are believed to contribute the most toward improved quality of life.



2. Which type of innovation do you feel will contribute the most toward improved quality of life for people around the world?



Impressions of:
“Seed
Improvement,”
“Seed Science”
and
“Plant Breeding”
by Audience

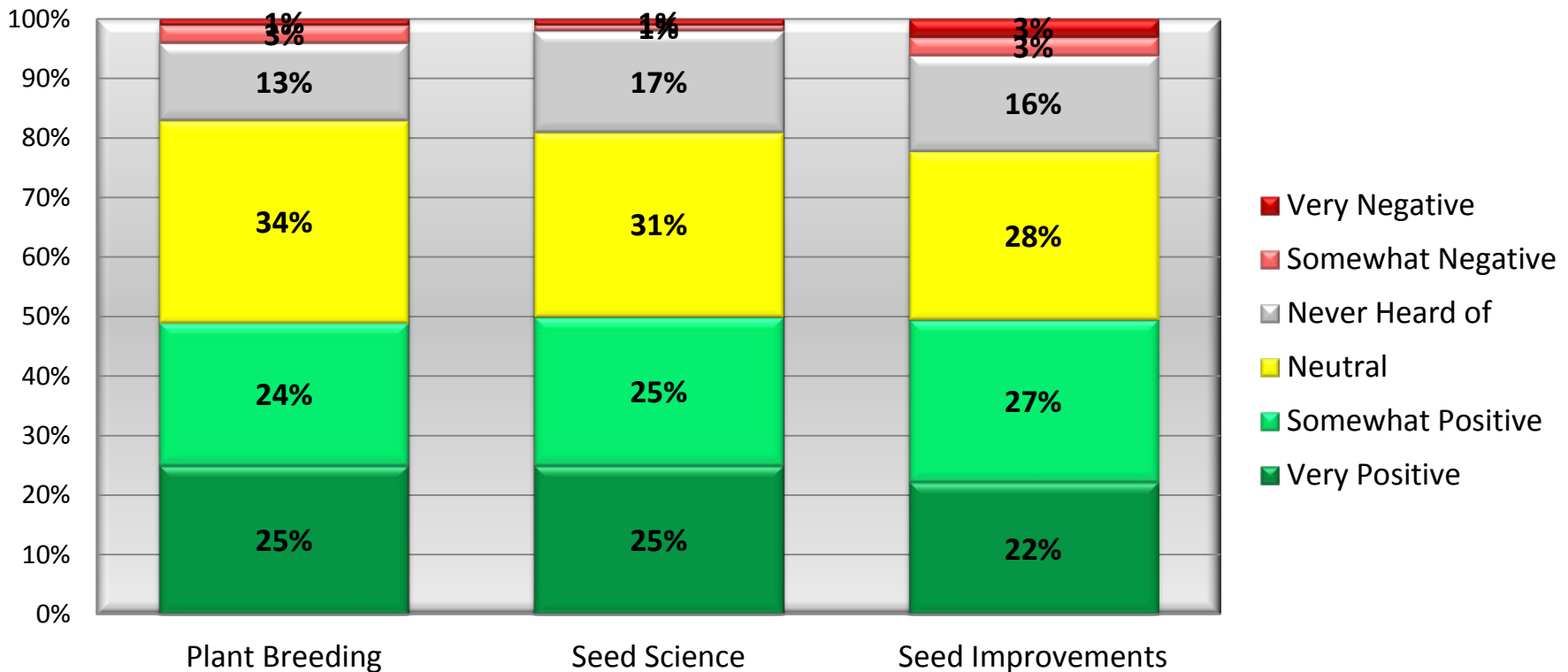
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Millennials have about the same impression of the terms plant breeding, seed science, and seed improvements.



4-6. Now I am going to read you a list of agricultural terms. After I read each one, please tell me if you have a positive or negative impression of that term. If I read you one you have never heard of, just tell me and we'll move on to the next term.



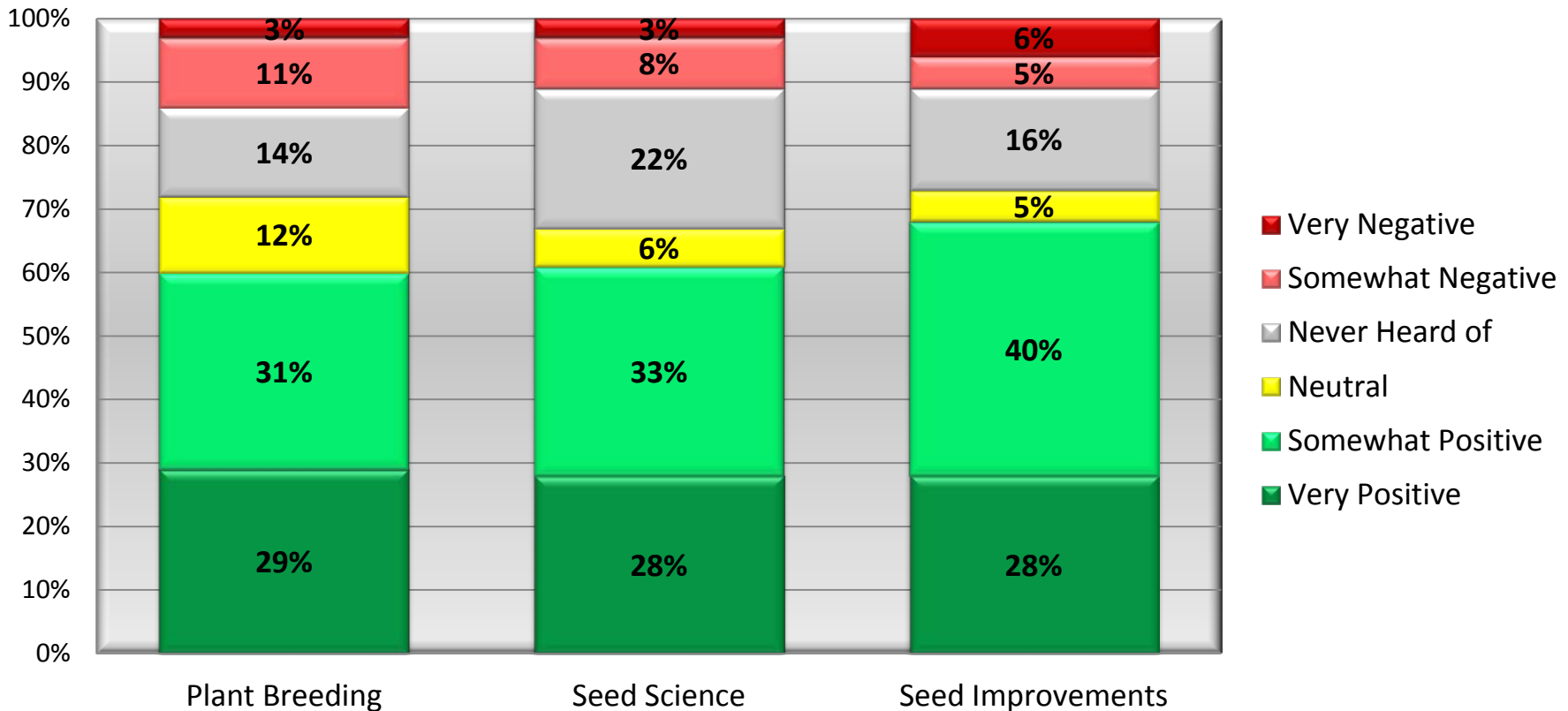
	Plant Breeding	Seed Science	Seed Improvement
Total Positive	49%	51%	50%
Total Negative	4%	2%	6%

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Seed improvements is the most positive term among moms.



4-6. Now I am going to read you a list of agricultural terms. After I read each one, please tell me if you have a positive or negative impression of that term. If I read you one you have never heard of, just tell me and we'll move on to the next term.



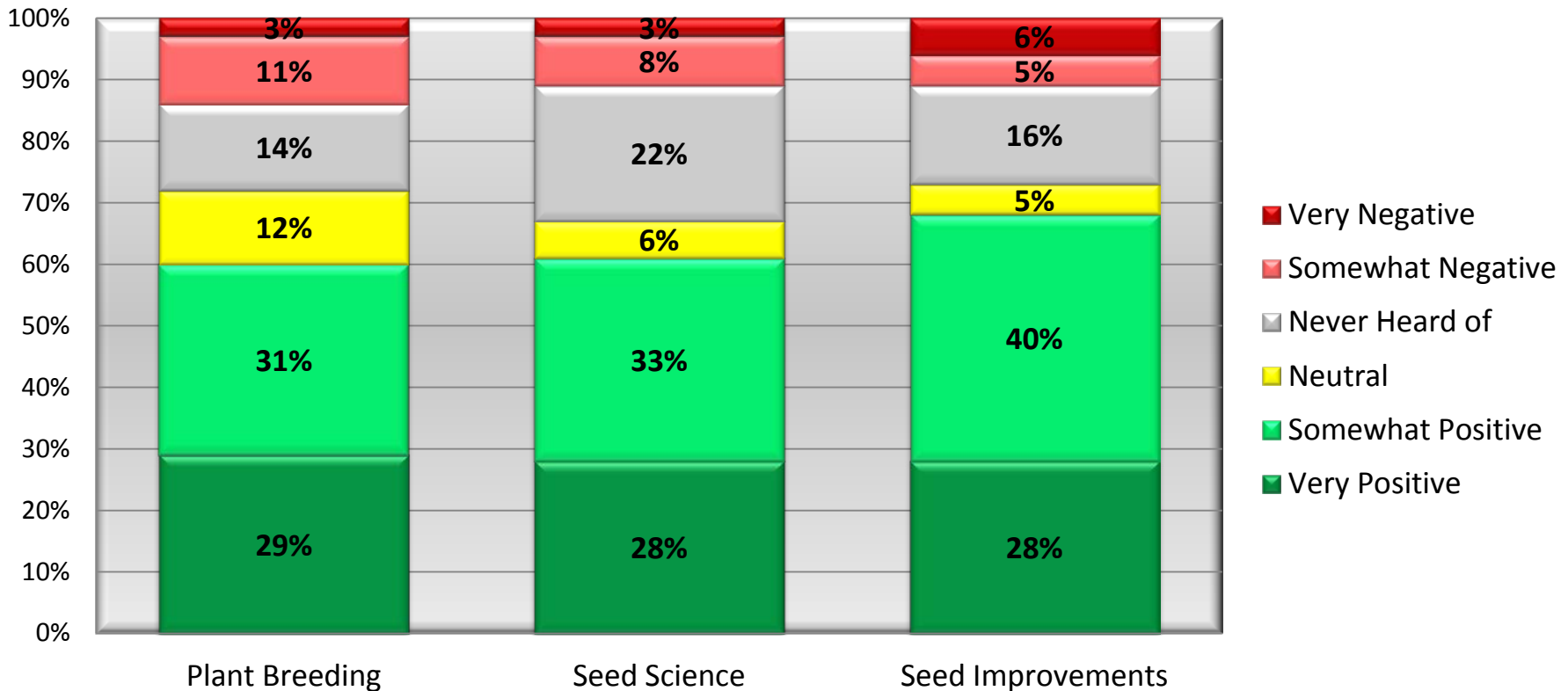
	Plant Breeding	Seed Science	Seed Improvement
Total Positive	48%	52%	58%
Total Negative	6%	6%	5%

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Seed improvement is the most positive term among food-focused people.



4-6. Now I am going to read you a list of agricultural terms. After I read each one, please tell me if you have a positive or negative impression of that term. If I read you one you have never heard of, just tell me and we'll move on to the next term.



	Plant Breeding	Seed Science	Seed Improvement
Total Positive	60%	61%	68%
Total Negative	15%	11%	11%

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Reactions To
Specific Quality
Of Life Benefits:
All Audiences

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Quality of Life Benefits



	Much More Positive	Total Positive
Allows farmers to grow a wide variety of foods so consumers can make choices that are right for themselves and their families.	38%	65%
Allows family farmers to sustain their way of life for generations to come.	42%	69%
Allow farmers to more efficiently produce food, which enables US families to spend an average ten percent of their income on food versus up to sixty percent in other countries.	36%	68%
Allows for less food waste because new varieties yield produce that stays fresh longer and has more consistent quality.	40%	67%
Allows for greater energy security through the production of renewable fuels made from agricultural crops.	32%	60%

Quality of Life Benefits



	Much More Positive	Total Positive
Many environmental benefits such less soil erosion and less water use.	43%	65%
Allow for reduced pesticide use.	26%	50%
Allow for the development of plants that are ideal for restoring land.	40%	69%
Creates for more nutritious and efficient feed for livestock.	38%	67%
Allows for the creation of fruits and vegetables that taste better.	31%	62%

Quality of Life Benefits



	Much More Positive	Total Positive
18. Results in foods that are healthier and provide better nutrition.	45%	70%
19. Produces turf that's better for sports and recreational activities.	24%	50%
20. Create flowers that have more vibrant colors and more pleasing fragrances.	19%	53%
21. Enable the development of fiber crops that result in fabrics that are softer or stronger.	30%	63%

Quality of Life Benefits



	Much More Positive	Total Positive
22. Enables better varieties of plants so home gardeners can be more successful.	36%	66%
23. Allows us to produce more food from the same land.	48%	76%
24. Enables the discovery of foods that are more convenient for consumers.	30%	60%
25. Allow for a wide variety of foods to choose from.	34%	64%
26. Allow for the establishment of more sustainable habitats for wildlife.	33%	66%

Yet To Come: A
Deeper Dive
Into The Data

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Using Message Maps

Message Mapping™ identifies the exact language and messaging that will really move consumers.

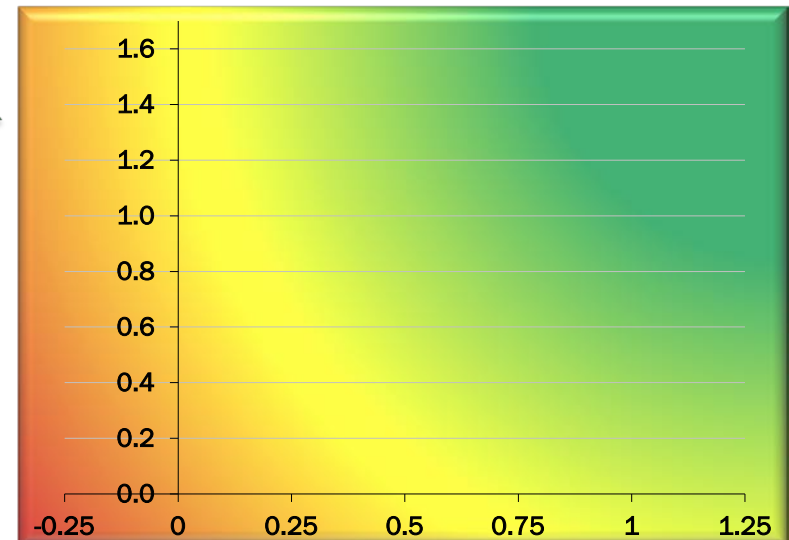
- Often, what consumers say is important and the issues that gain support are not the same. Message Mapping™ allows your campaign to identify these “winning” messages.
- Message Mapping™ is a proprietary tool used to determine power of potential messages by testing three key characteristics—real effectiveness, “stickiness,” and believability.
- Messages are represented on bubble charts, providing an easy to use “map” for further action.

Effectiveness

- Using a scientific “treatment effects” design we can determine exactly how effective each message is at changing consumer’ minds.
- This effectiveness measurement is shown on the “x” or horizontal axis.
- The more effective a message, the further to the right it appears.

Stickiness

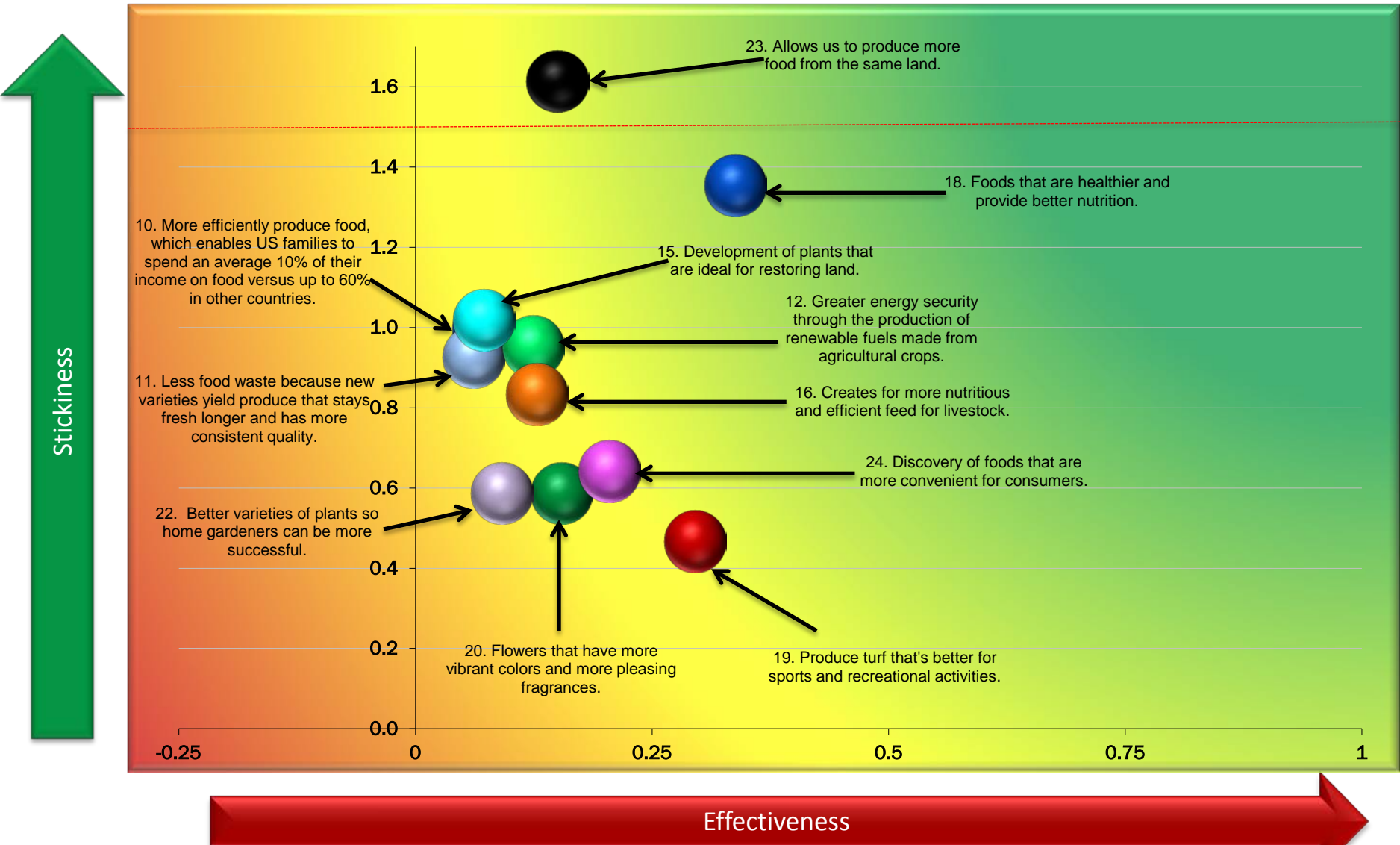
- Our message “stickiness” analysis tells us which messages will be the most memorable to consumers.
- The “stickier” a message is the more likely it is to break through the clutter and reach consumers.
- The “stickiness” measure is shown on the “y” or vertical axis. The “stickier” a message is the higher it appears on the graph.



Among those who heard seed improvement, the most effective message is that foods that are healthier and provide better nutrition. The most memorable is that it allows us to produce more food from the same land.

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Seed improvement (32%)*



*These are the top messages for this group.

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Millennials

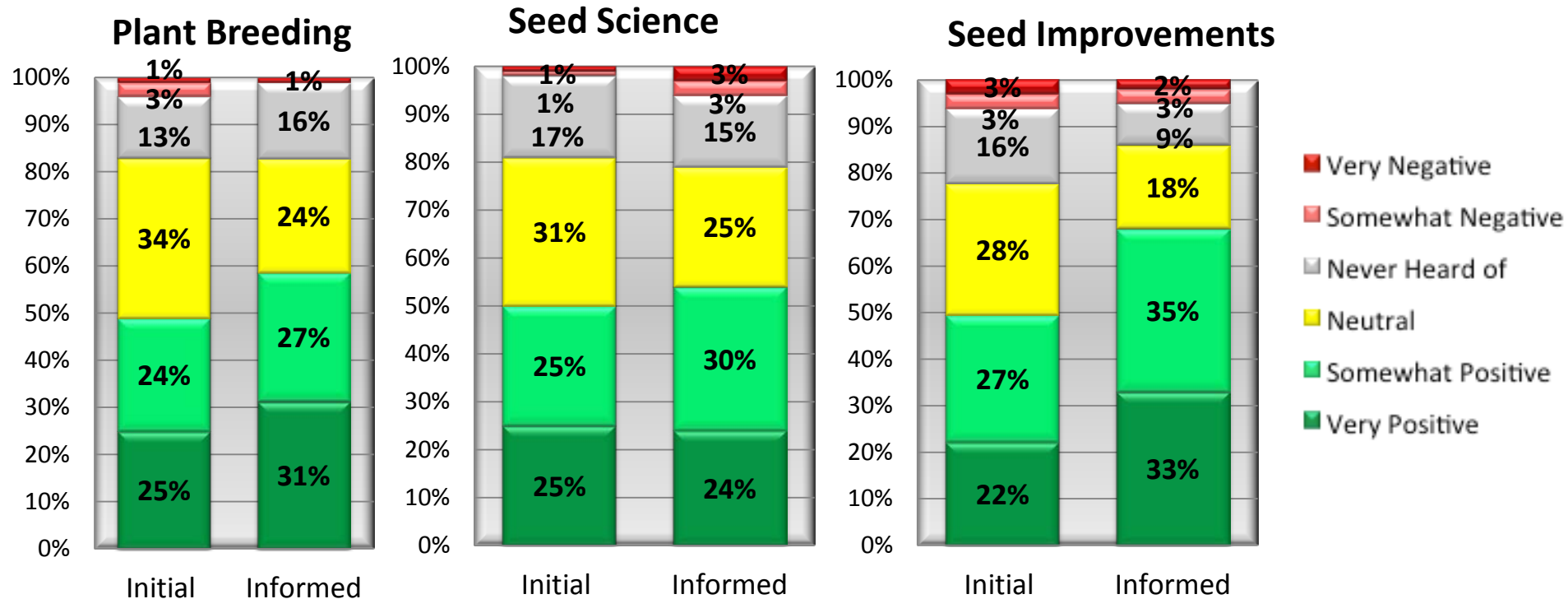
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The biggest movement among millennials was with the term seed improvement.



27. Now that you have heard more about (A. Plant breeding /B. Seed science/C. Seed improvements), do you have a ROTATE positive or a negative END ROTATION impression of (A. Plant breeding /B. Seed science/C. Seed improvements)?



Informed	Plant Breeding		Seed Science		Seed Improvement	
Total Positive	49%	58%	51%	54%	50%	68%
Total Negative	4%	1%	2%	6%	6%	5%

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- The most change among millennials comes from using the term **seed improvement**.
 - In the verbatim responses, they potential to feed more people is frequently cited.
- The best messages among millennials:
 - Overall, among millennials is that it produces turf that is better for sports and recreational activities.
 - Second best message that it enables better varieties of plants so home gardeners can be more successful is also very effective.
 - Specifically, the best message for seed improvement among millennials is that food is healthier and less expensive.

Moms

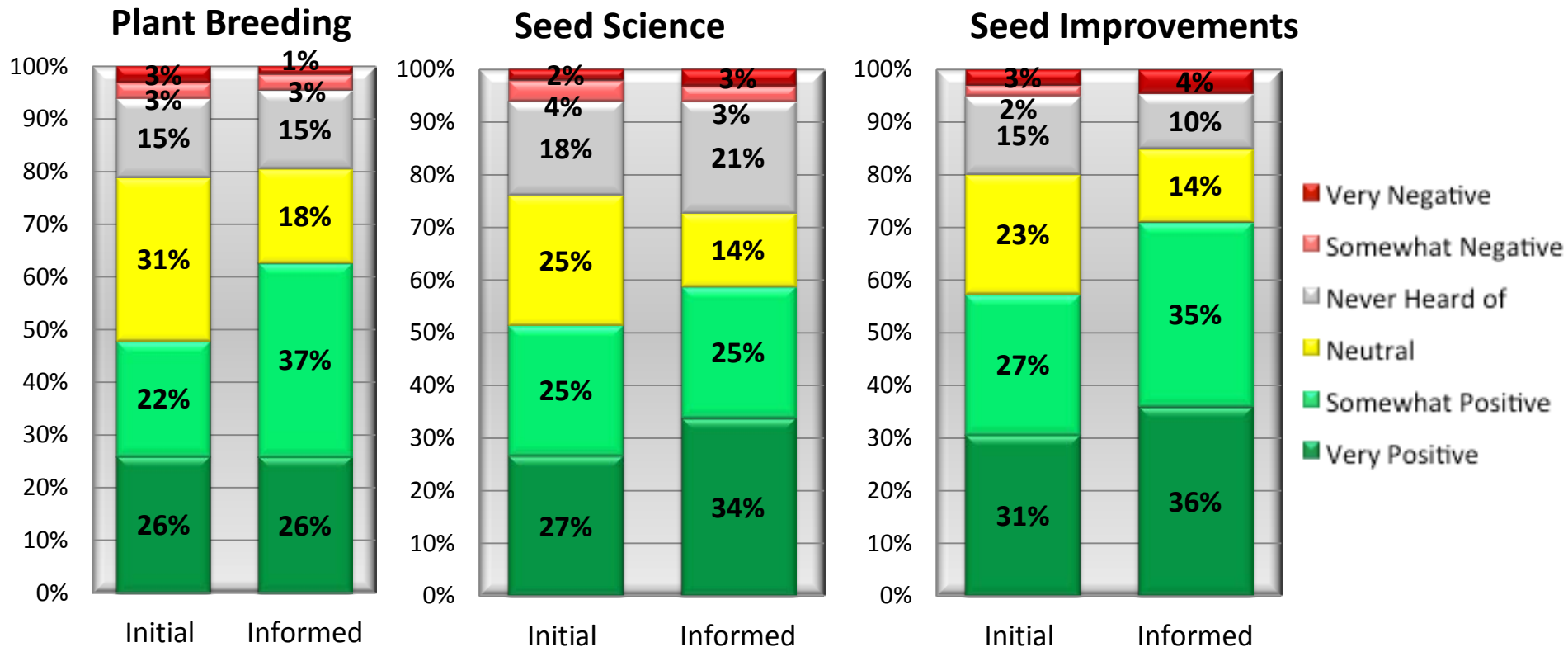
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The biggest movement among moms was with the term **seed improvement**.



27. Now that you have heard more about (A. Plant breeding /B. Seed science/C. Seed improvements), do you have a ROTATE positive or a negative END ROTATION impression of (A. Plant breeding /B. Seed science/C. Seed improvements)?



Informed	Plant Breeding		Seed Science		Seed Improvement	
Total Positive	48%	63%	52%	59%	58%	71%
Total Negative	6%	4%	6%	6%	5%	4%

- Seed improvements is the most positive term among moms.
- The best messages:
 - It will enable a wide variety of foods to choose from.
 - Second best message about the discovery of foods that are more convenient for consumers is also effective.

Food-Focused People

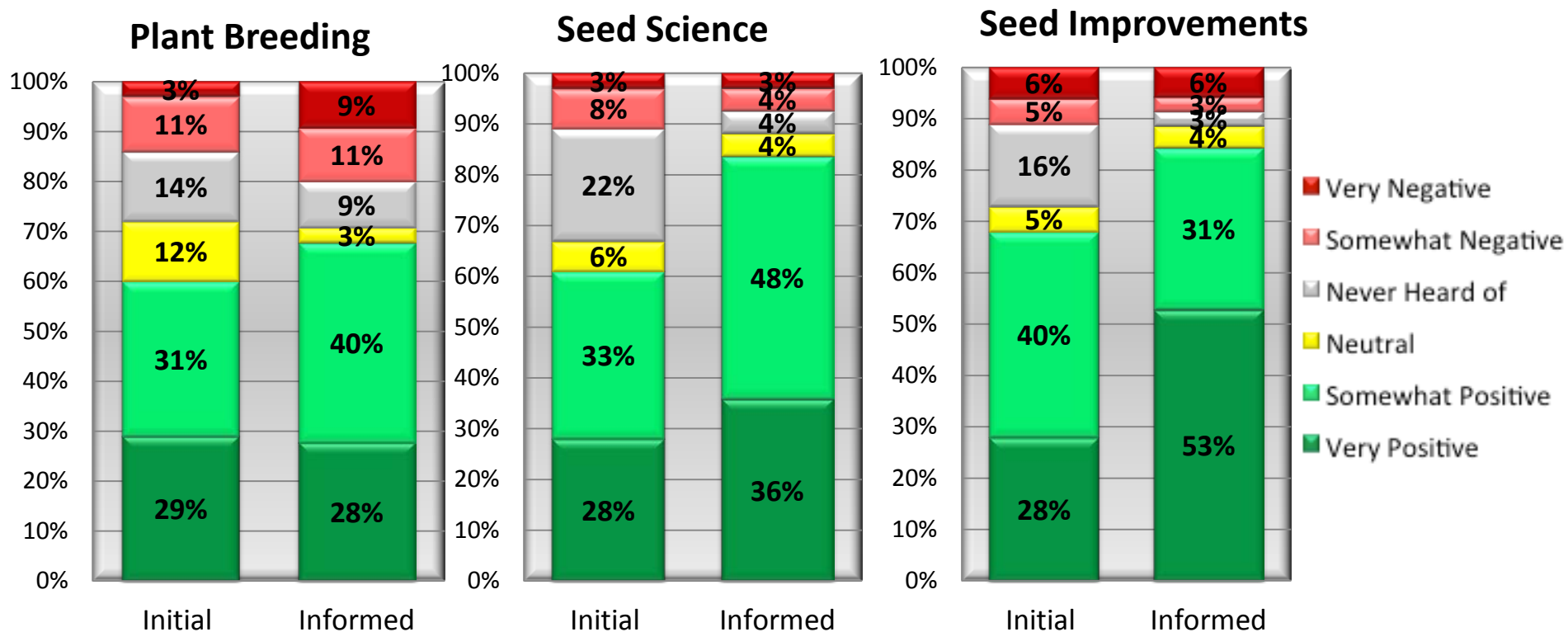
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The biggest movement among food focused was with the term seed science.



27. Now that you have heard more about (A. Plant breeding /B. Seed science/C. Seed improvements), do you have a ROTATE positive or a negative END ROTATION impression of (A. Plant breeding /B. Seed science/C. Seed improvements)?



Informed	Plant Breeding		Seed Science		Seed Improvement	
Total Positive	60%	68%	61%	84%	68%	84%
Total Negative	15%	20%	11%	7%	11%	9%

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- Nearly nine in ten food focused people believe that the role of technology is important for agriculture.
- Seed improvement is the most positive term among food focused people.
 - Nearly seven in ten food-focused people have a positive impression.
- The best messages:
 - Overall, the most effective message among “food-focused” people is less food waste because new varieties yield produce that stays fresh longer and has more consistent quality.
 - The second best message that the development of plants that are ideal for restoring land is also very effective.
 - Growing a wide variety of foods resonates with this group.

Education Key to Consumer Appreciation of Seed and Seed Improvement

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Yet, more than

3 in 4

consumers feel that the role of technology in agriculture is important.

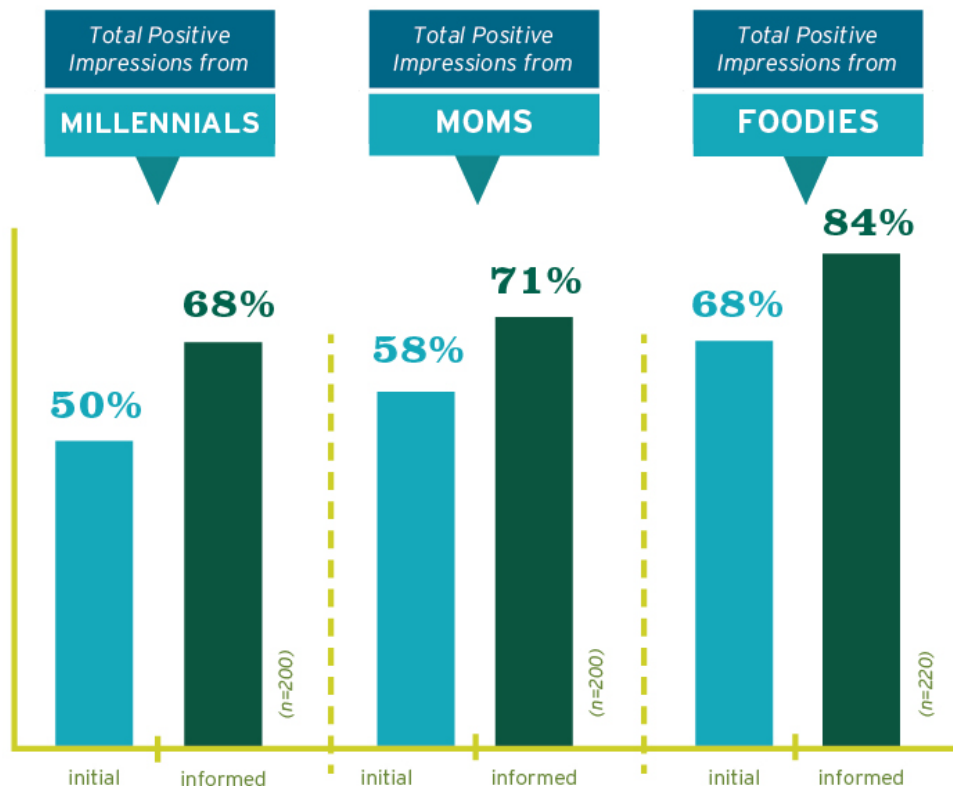


IMPORTANT

NOT IMPORTANT

NO OPINION

When people understand the specific benefits of seed improvement, they begin to show more appreciation.



Seed Improvement Enhances Quality of Life

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PRODUCING *more food from the same land.*

76% *viewed positively*



DEVELOPING *foods that are healthier & provide better nutrition.*

70% *viewed positively*



ALLOWING *family farmers to sustain their way of life for generations to come.*

69% *viewed positively*



CSS 2014 & Seed Expo

- By the Numbers
 - Nearly 3,000 Conference Registrants
 - Record Number of Exhibitors
 - Record Number of Poster Presentations
 - 32 Registered Members of the Media
 - Dedicated Media Room

Vegetable and Flower

- By the Numbers
 - Over 800 Conference Attendees
 - Record Number of Trade Floor Companies
 - 6 Registered Media
 - Outreach to over 90
 - Dedicated Media Room

Meeting Preparation

- 132nd Annual Meeting
 - Storm the Hill
 - Full Media Rollout
 - Committee Meeting
 - Materials Development
- Spring Communications Summit
 - Day and a half summit
 - Washington, D.C. or Member Company Host

Questions?