

Marketing and Promotion Report
for the
Vermont Sheep and Goat Association



source: babygoatsandfriends.com

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Introduction

The Vermont Sheep and Goat Association (VSGA) is a non-profit agricultural membership organization and has been in existence for over 100 years. Their purpose is to support, improve and strengthen the diverse community of sheep and goat breeders in Vermont and to work to insure a viable infrastructure to produce healthy animals and get their products to market. Members produce lamb, chevon, cheese, breeding stock, wool and other fiber.¹

In November of 2015, VSGA, in partnership with the Vermont Grass Farmers' Association, contracted with Lindsay Quella to conduct research that would assess members' current practices, markets and perceived needs, and would determine the role that VSGA could play in aiding member market development. Thus, the project originated with the question: **What can the VSGA do to help their members market and promote their products?**

In order to answer this question, it was determined that the following information was needed:

- **How do we categorize VSGA's membership?**
- **What are the potential challenges and opportunities for producers, in terms of marketing and promotion?**

To find the answer to these questions, information was gathered from three sources. First, a **survey** was sent via email to the VSGA member listserv. The survey featured quantitative and qualitative questions about member products, marketing tools, distribution channels and perceived needs from VSGA.

Second, a series of **interviews** were conducted over the phone and in person with established producers in Vermont, and with agriculture-related persons, such as technical service providers, distributors, restaurant owners, and industry supporters.

Third, **independent research**, on the topics of marketing opportunities and challenges for sheep and goat producers, was conducted and evaluated.

¹ <http://vtsheepandgoat.org/>

Executive Summary

Categorizing VSGA Membership

A snapshot of survey respondents shows:

- 88% keep fewer than 50 animals, with most respondents keeping **fewer than 25 animals**.
- Most respondents (87%) **keep sheep**. About a third (29%) keep goats and 16% keep both sheep and goats.
- 91% of respondents **gross \$50,000 revenue or less per year**.
- The majority of respondents sell **sheep's wool** (63%) and **lamb/mutton** (58%).
- Most respondents (89%) use traditional **word-of-mouth marketing**. 55% also use **social media**, and half (50%) use **online directories**. A little **less than half** (46%) have a **farm website**.
- All respondents (100%) sell **directly to consumers**.

If the respondents are representative of the membership, one can conclude VSGA members are mostly **small farmers** who **sell their products directly** and use **word-of-mouth marketing**. Based on the qualitative results of the survey, they have **some marketing knowledge** but would like **more help using social media and farm websites** to connect with consumers and **help pricing their products**.

Producer Opportunities and Challenges

Opportunities for producers include a **relatively high demand for grass-based products** across the nation. In this environment, there continue to be **market opportunities in regional cities across most product types**.

Many producers share similar marketing-related challenges that can be categorized in two ways. The first are **production challenges**, such as:

- Difficulty accessing preferred slaughtering facilities.
- Desire for more technical information.
- Difficulty maintaining a consistent inventory.
- Lack of time.

The second are **marketing challenges**, such as:

- Difficulty identifying markets.
- Need for more marketing information, including how to price products and market research.
- Need for increased consumer education about price points.

- Need for increased consumer education about buying lesser-known types of meat (such as lamb and chevon), buying in bulk, buying and preparing frozen meat, preparing less popular cuts, and eating seasonally.
- Lack of demand for fiber products.

Fortunately, most of these points represent opportunities for VSGA.

Answering the Original Question

In the short-term, VSGA has the potential to greatly impact member's businesses. Specifically, VSGA has the following **producer-oriented opportunities**, listed in order of priority:

- Educate producers via website and social media on following topics:
 - * Marketing
 - * Attributes
 - * Price
- Advocate for member resources from UVM Extension and other organizations.
- Provide research data for members.

In addition, VSGA has several **consumer-oriented opportunities**, listed in order of priority:

- Develop promotional materials for sheep and goat products, including information about price points and preparing unfamiliar meats.
- Develop promotional materials for buying in bulk, buying and preparing frozen meat, preparing less popular cuts, and eating seasonally.
- Attend consumer-facing events and sample member products.

VSGA also has the opportunity to **work with other agriculturally based organizations** to disseminate information, share resources and build connections.

VSGA also faces some challenges. It will be difficult for VSGA to take advantage of short-term opportunities without **hiring additional staff or an executive director**. Board Members already seem to be operating at capacity with their Board duties and professional responsibilities, and the aforementioned opportunities will take a considerable amount of time and effort.

Looking at the Long-term

The major challenge for VSGA will be **deciding where to put their resources and energy** given the wide range of their membership and needs of members. As of right now, VSGA does not offer larger producers anything that they cannot access elsewhere. VSGA should investigate **who their potential members are**, in terms of levels of production and product types. Once VSGA has that information, they can then **decide what kind and how much support they want to give to each type of producer**.

The **major long-term recommendation** for VSGA is to **keep careful track of what resources** (time, money, etc.) **are benefiting which members** (sheep, goat, production-oriented, non-production oriented). By knowing where resources are going, VSGA can accurately assess whether or not those resources are making a measurable difference for member farms and businesses. Furthermore, they can be deliberate about **what kind of organization they want to be**, and **how they want to be perceived in the sheep and goat industry**.

Methods and Approaches

Given that VSGA has 100+ members, it was determined that the most efficient and accurate way to collect data was to conduct an **online survey distributed via email**. The survey was written using UVM Center for Sustainable Agriculture's SurveyMonkey account, and includes input from VSGA Board Member Bay Hammond.

The survey was sent to **the VSGA member listserv**. The survey went out to approximately 158 members and got a response rate of 36% or 57 respondents.

The question types were a mixture of **demographic questions, multiple choice, rating scale, ratio scale, and open-ended**. Most questions had the option of adding a **comment**.

Concurrent with the survey, I also conducted a **series of personal interviews**. The goal of the interviews was to **add more detail** to the answers from the survey, to **capture opinions of non-producers**, and to let producers and non-producers alike **give feedback that might not have been given in the survey**. The questions posed to interviewees were similar to the ones on the survey, however the interviews were conducted in a conversational manner, **allowing interviewees to guide the conversation** to other topics not on our question list. I spoke with interviewees by phone and in person.

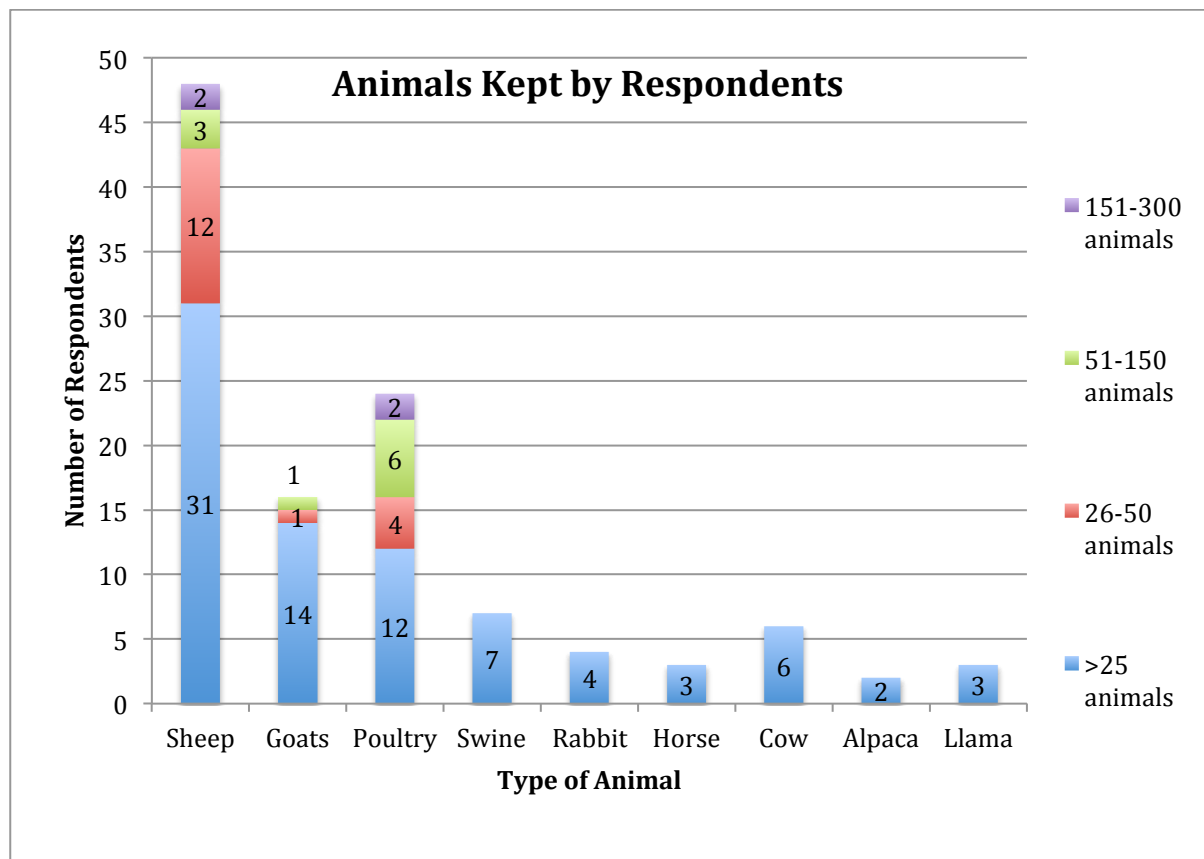
Over the course of this project I formally interviewed 25 people: 12 farmers, 9 technical service providers/industry supporters, and 4 distributors and restaurateurs. In addition, I spoke informally to 5-10 more individuals at workshops, conferences and meetings. The interviewees agreed to be interviewed on the **condition of anonymity**, therefore I did not use specific names unless necessary for context.

The third source for this report is **independent research conducted via the Internet**. In order to avoid bias, all research was conducted after the survey and interviews so as not to influence the analysis of data or conversations with individuals. All external sources are footnoted.

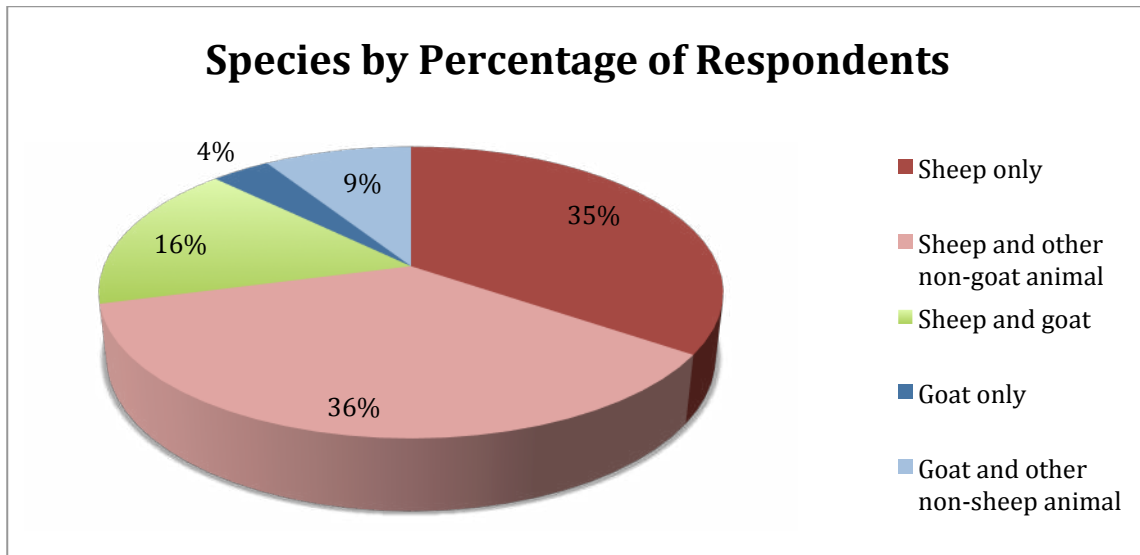
Demographics of Survey Respondents

If the respondents are representative of the membership, one can conclude they are mostly small farmers, who sell their products directly and use word-of-mouth marketing.

Types of Animals

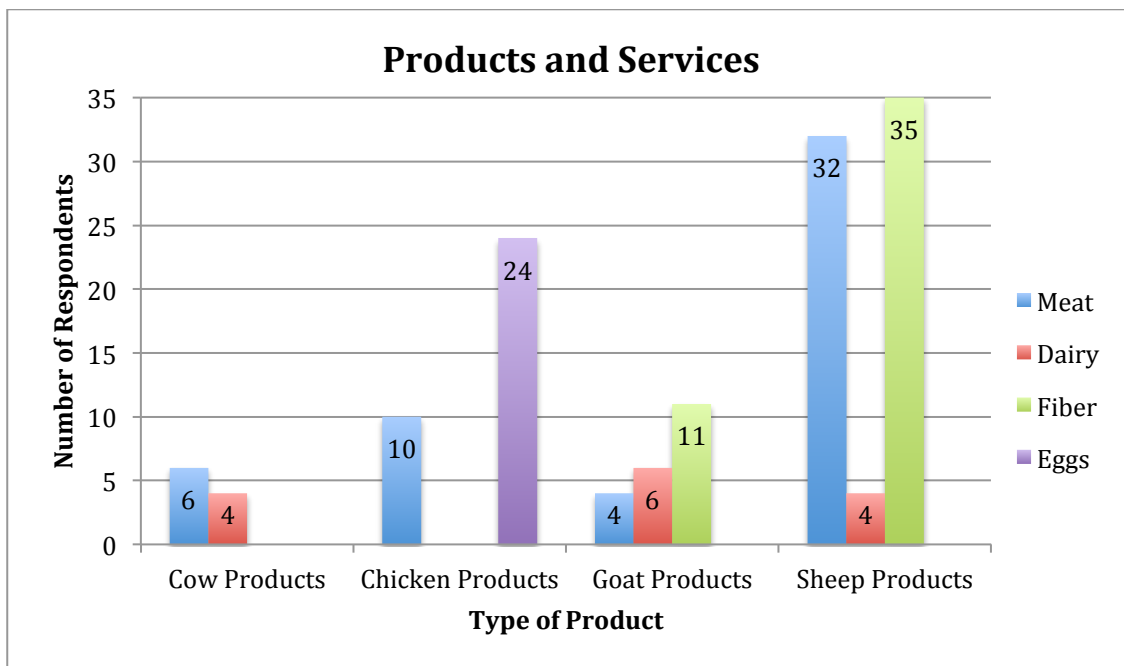


Of the 55 respondents, 87% keep sheep, 29% keep goats, and 44% keep poultry. Almost all respondents (88%) keep fewer than 50 animals and the majority (74%) keep fewer than 25.



As reflected in the chart of above, a little over a third (35%) of respondents keep sheep as their only animal, while another third (36%) keep sheep and at least one other non-goat animal. Very few respondents keep only goats (4%), and a slightly larger percentage (9%) keep goats and another non-sheep animal. 16% of respondents are both sheep and goat owners.

Products and Services



As seen in the graph, the majority of respondents keep sheep for fiber and for meat.

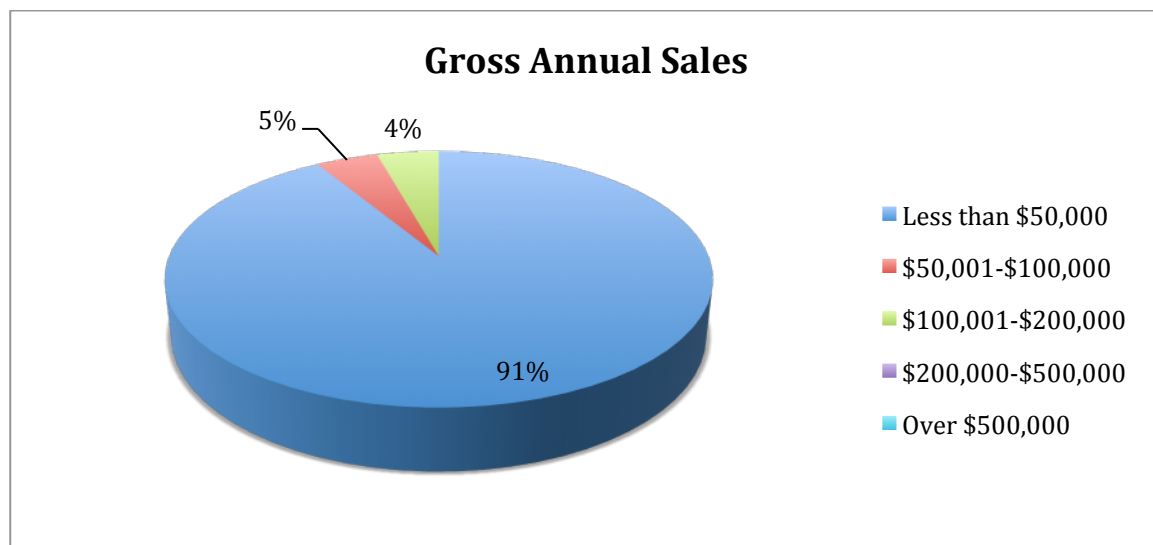
Sheep: Of the respondents who keep sheep, 61% keep sheep for fiber, 56% keep sheep for meat, and 7% keep sheep for dairy.

Eggs: The second most common products are eggs. Of the respondents who keep chickens, 42% keep chickens for meat, and 100% keep chickens for eggs.

Goats: Of the respondents who keep goats, 19% keep goats for fiber, 11% keep goats for dairy, and 7% keep goats for meat.

Cows: And finally, of the respondents who keep cows, 100% keep cows for meat, 67% keep cows for dairy.

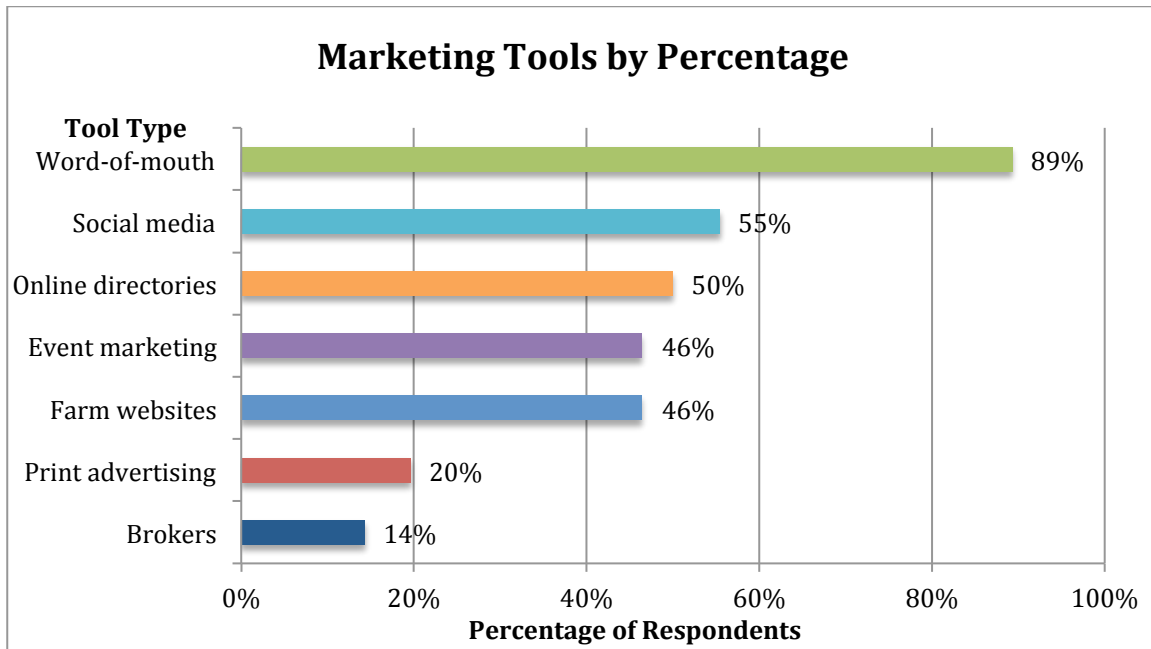
Gross Annual Sales



The vast majority of respondents gross less than \$50,000 per year. No respondents gross over \$200,000 per year.

Marketing Tools

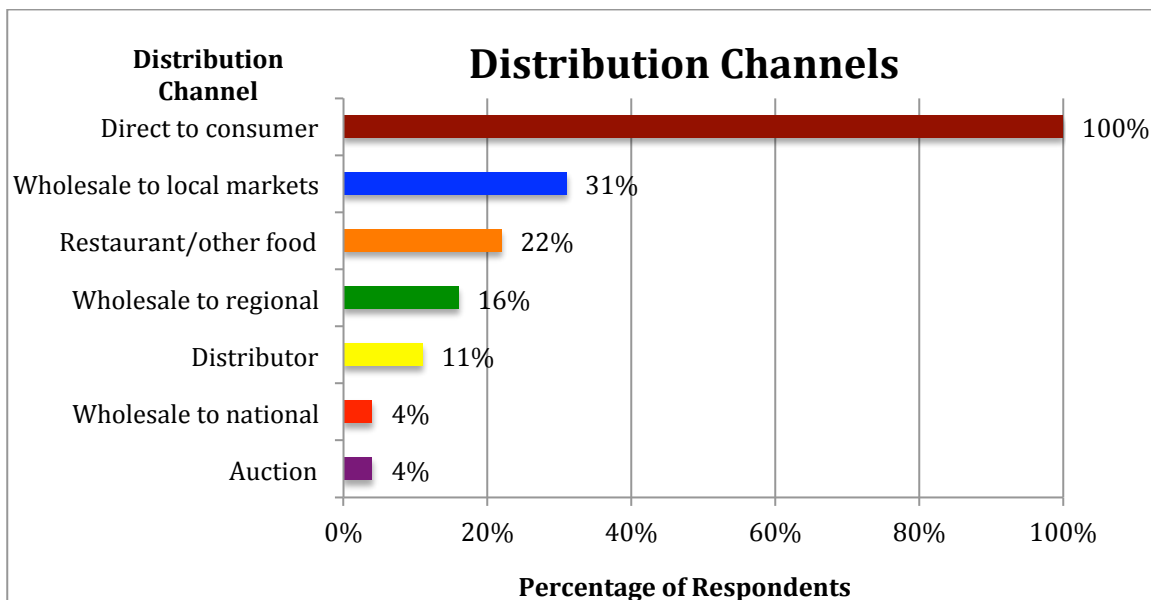
In the survey, several questions refer to “marketing strategies.” However, it would have been more appropriate to call them “marketing tools,” since they are tools producers use to promote and sell their products, as opposed to fully fleshed-out strategies or plans. Throughout the rest of the report, I will refer to them as “tools” rather than “strategies” to emphasize that fact. Given that many producers use multiple tools to advertise their products, respondents were allowed to choose multiple options.



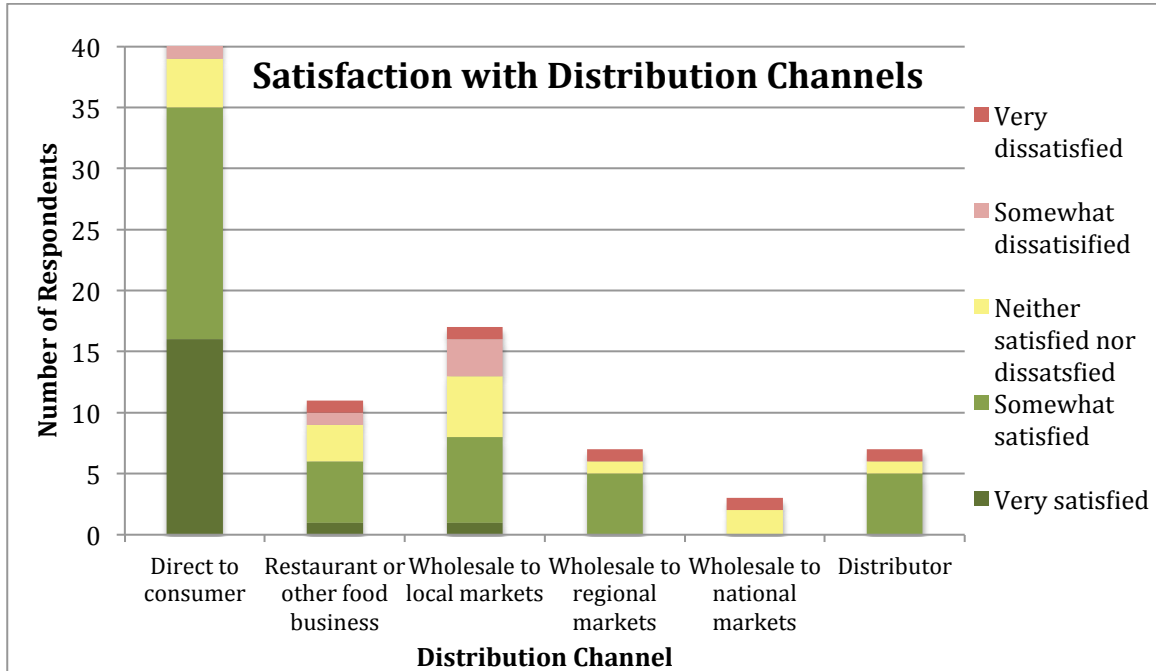
The almost ubiquitously used marketing tool is word-of-mouth. Since 100% of respondents sell their products directly to consumers, reputation and person connection are likely also factors in respondents' successes. Word-of-mouth marketing is a low-cost, highly effective marketing tool. Use of technology-based tools, such as social media, websites and online directories, is also relatively prevalent among respondents.

Respondents and Distribution Channels

What channels do you use to sell your products?



Because respondents use multiple distribution channels, respondents were allowed to choose more than one option. The most commonly used channel is direct to consumer—100% of respondents sell product directly. Second and third most common are wholesale to local markets (31%) and restaurants/food businesses (22%). Following that are wholesale to regional markets (16%), distributors (11%), wholesale to national markets (4%) and auctions (4%).



As the chart shows, producers are generally satisfied with their distribution channels. Producers are most satisfied with direct to consumer channels, and least satisfied with restaurants, wholesale to local markets, and wholesale to national markets.

Market Opportunities & Challenges for Sheep/Goat Products

When thinking about how VSGA can help its members in marketing their product, it is useful to have a sense of the current marketing opportunities for sheep and goat products in the US. Because of the size and scope of this project, I tried not to go into too much detail—equally extensive and separate reports could be written on each one of these products—but rather provide a snapshot of each industry on the whole right now. This information is not intended to represent local or regional trends unless specified, or replace producer-specific market research.

Opportunities by Product

Meat

Since the Second World War, by and large, Americans have stopped eating sheep. In 1945, there were 55 million head of sheep in the US. By 2013, there was around a tenth of that number. The decline in the demand for wool led to some of the liquidation of the sheep flock, but so did changing food tastes. The average American used to eat upwards of 4 lbs. of lamb in any given year, but now two out of three do not eat any at all.²

The consumers who still eat lamb are now a small niche market, incorporating immigrants from countries where lamb is a staple and foodies in search of pasture-raised authenticity. Demand is slowly regaining strength, along with a growing consciousness about the provenance of animals and the conditions they're raised under.

For example, “it is estimated that half a million sheep each year are channeled into the nontraditional marketplace – such as ethnic and direct-to-consumer markets. Often these nontraditional markets offer premiums to farmers and ranchers over traditional marketing channels. Small to mid-sized producers and farmers, in particular, often use direct-to-consumer markets to get better prices for their products, while creating their own niche in the marketplace.”³

In May of 2015, the USDA’s Agricultural Marketing Service began issuing a “National Monthly Grass Fed Lamb and Goat Meat Report.” They noted: “While there is an increase demand for the [aforementioned] types of products, there is little public data available to farmers and ranchers. With this new market report and improved access to

² <http://www.theguardian.com/us-news/2015/jun/12/demand-grass-fed-meat-saving-lamb-market-giving-dogs-jobs>

³ <http://blogs.usda.gov/2015/05/13/usda-fosters-market-transparency-in-grass-fed-lamb-and-goat-industry/>

information, USDA aims to assist farmers and ranchers who are considering converting to grass fed operations and those who are already producing grass fed lamb and goat products.

In addition to market commentary, the new report will include prices for both wholesale grass-fed lamb and direct-to-consumer grass-fed lamb and goat. This monthly report will bring market clarity and exposure to assist the grass-fed industry in marketing their products.”⁴

Consumer education and marketing for lamb and goat meat is an area where there is room to grow. One distributor felt that lamb, and particularly grass-fed lamb, is something Vermonters could sell more of if it were better marketed. “Restaurants and retail could promote lamb better. There could be more information out there that says, ‘this is why grass-fed lamb is important to the landscape; why it’s economically viable, etc.’” Goat meat producers may also have the opportunity to take advantage of increasing interest in ethnic foods. One restaurant owner mentioned, “The more high profile restaurants [serving goat meat], the better.”⁵

Dairy

In recent years both sheep and goat’s milk cheese have enjoyed considerable popularity. In Specialty Food’s article, “Sheep’s Milk: A New American Cheese,” Janet Fletcher explains that despite the fact that most sheep’s milk cheese comes from Europe, demand is strong for local products. She writes, “Consumers seem willing to pay a premium for domestic sheep cheeses, merchants say. Few American producers can compete on price with popular imports like Spain’s Manchego and France’s Abbaye de Belloc. ‘But I don’t think they have to because everyone wants local,’ says Rob Graff, a cheese monger with Venissimo Cheese, a San Diego retailer with three locations. ‘And in San Diego, local means West Coast, or even domestic.’” There are also opportunities for sheep cheese producers to expand.⁶

What’s missing in the domestic sheep’s milk niche? Fresh and soft-ripened cheeses, says Thompson. “Getting them to market is difficult,” admits the merchant, “but if someone could do it, there would be a great response.” Graff sees the whole sheep’s milk category as wide open for would-be cheese makers, who occasionally come to him for insights. “If you can get your hands on sheep’s milk,” says Graff, “that’s what the market wants right now.”

⁴ *ibid.*

⁵ <http://blogs.usda.gov/2015/05/13/usda-fosters-market-transparency-in-grass-fed-lamb-and-goat-industry/>

⁶ <https://www.specialtyfood.com/news/article/sheeps-milk-new-american-cheese/>

Goat milk dairies are also enjoying growing demand. “Americans’ growing taste for more unusual fare has contributed to a steady increase in demand for goat products in recent years, and producers across the country are trying to determine how to secure enough milk to give consumers what they want while continuing to develop their merchandise.”⁷ The demand for alternatives to cow’s milk dairy products seems to be due to “increased interest in artisan cheeses and populations that are more accustomed to goat milk, such as Hispanic and Jewish communities.”

From an article in Agrinews⁸:

Americans’ growing taste for more unusual fare has contributed to a steady increase in demand for goat products in recent years, and producers across the country are trying to determine how to secure enough milk to give consumers what they want while continuing to develop their merchandise.

The nation’s dairy goat herd climbed 2 percent in the past year to 365,000 animals, but producers said their annual sales are rising even faster — up by 15 percent or more. In Iowa, the number of goat farms has climbed from less than 20 a decade ago to about 200, behind only Wisconsin and California.

Sheep and goat milk accrued \$92.2 million in sales in 2012, according to the most recent figures available from the U.S. Agriculture Department’s census, with combined sales about a third higher than in the previous 2007 census.

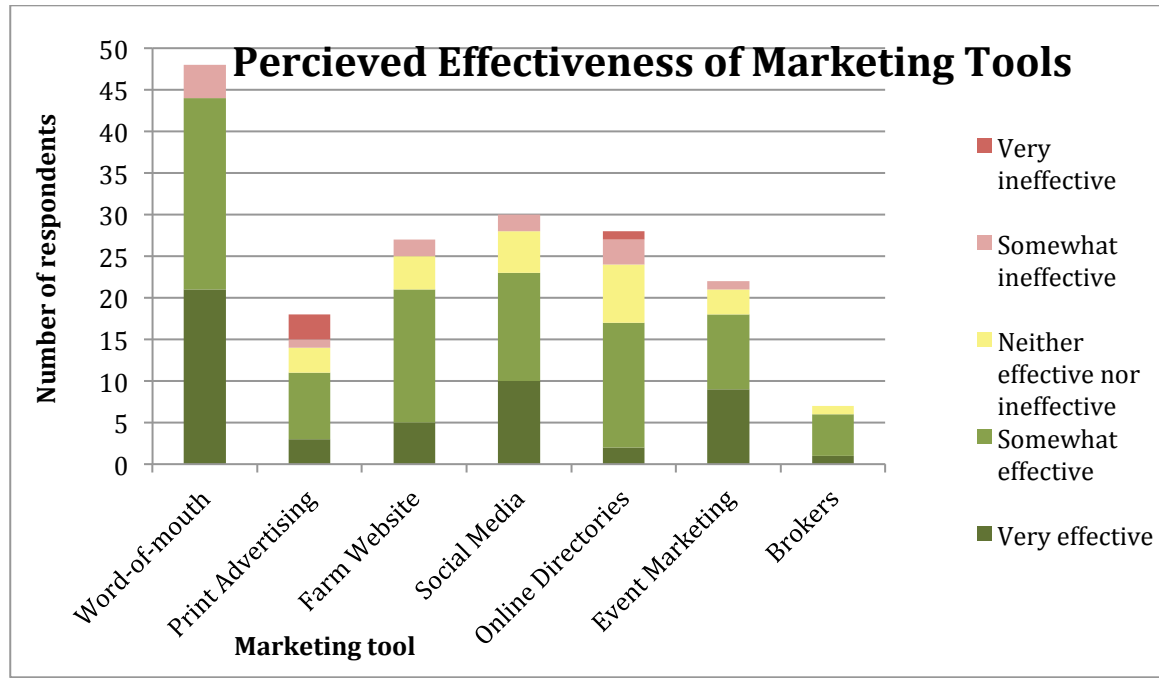
Locally, Ayres Brook Dairy has been working towards becoming a model for other local goat milk famers. They currently source milk from both Vermont and Canada, and are looking to source more milk from Vermont in the future. Miles Hooper, crop and operations manager at Ayres Brook, says he has a long-term goal of converting traditional cow dairymen to goat dairymen, “Right now we are paying \$50/hundredweight for milk, plus goats are more efficient on pasture. We get more production per acre of grass with goats than cows.”

⁷ <http://www.agrinews-pubs.com/Content/Auction-Calendar/Livestock/Article/Demand-jumps-for-goat-milk-/15/7/12200>

⁸ *ibid*

General Opportunities

One of the biggest opportunities for producers, according to feedback from the survey, is increased interaction with customers via social media and farm websites. It is clear from their responses that respondents recognize the Internet plays in connecting producers their customers—online tools are effective and they are asking for help developing a greater fluency.



As seen in the chart above, most respondents are satisfied using word-of-mouth marketing: 83% find the tool “very” or “somewhat” effective. The lease effective tool reported is print advertising, followed by online directories.

Of the 30 respondents who use social media, 76% find it to be “very” or “somewhat” effective, and of the 26 respondents who have a farm website 80% of them find it to be “very” or “somewhat” effective. In addition, 81% of respondents using online directories find it “very” to “somewhat” effective. Event marketing also got a high rating—85% of respondents who use them find them to be very or somewhat effective.

Many respondents (42%) report wanting more help with a farm website and social media. 37% are looking for help with online directories and 25% want more help with event marketing.

Challenges

Many producers face **production challenges**, such as:

Difficulty Accessing Preferred Slaughtering Facilities

The topic of slaughtering facilities brought out many thoughts and options from survey respondents. In general, respondents are divided in terms of how satisfied they are with their ability to access preferred slaughtering facilities. 42% reported to be very or somewhat satisfied, 16% are neither satisfied nor dissatisfied, and 42% are somewhat or very dissatisfied.

In the comments section of the survey, challenges regarding preferred slaughterhouses generally fell into one or more of three categories: location, quality, and timing/availability. 20% of respondents reported difficulty in scheduling appointments and 24% said they were unhappy with the level of quality and professionalism at the slaughtering facilities they use. Of the producers who are satisfied, they mentioned having positive long-term relationships with their processing facility, perhaps indicating developing relationships is more of a challenge for new producers. Another 20% expressed the desire to have the ability to sell products slaughtered on-farm.

The interviews also revealed frustration. Says one established lamb farmer, “Facilities are set up to do pork and beef and they don’t feel they can be as profitable processing lamb. We get pushed out when things are busy. They’ll [slaughter the lambs] but they aren’t happy, or they won’t do as many as they said, or they won’t do them at all.” A technical service provider explains the issue this way, “The slaughtering facilities can’t handle small animals, but they won’t expand until enough consistent, quality products are coming through.”

Desire for more technical information

One of the main themes that emerged from conversations with sheep and goat producers is the desire for more technical assistance for small ruminants. Says one lamb producer: “I have good support in terms of management of forage and management of land—soil health, soil amendments—but I wish there was more support in terms of animal health and animals themselves. UVM’s Livestock Specialist has not provided consistent technical support.” Another lamb and sheep dairy producer also suggested, “one thing that would be useful, that could come from VSGA, is genetic work and access

to good meat rams.” Another goat cheese producer suggested more seminars on small ruminant health and a goat listserv geared toward commercial producers.

Difficulty Maintaining a Consistent Inventory

In the survey 13% of respondents cited the challenge of consistency in supply and demand. Producers wrote that they struggled to produce enough in off-season months and produced too much during other months. This is most likely due to the fact that many respondents run small farms and produce in a region with long winters. One producer writes: “I need to be able to sell more in the winter months, and track sales so that my production matches better.”

Lack of Time

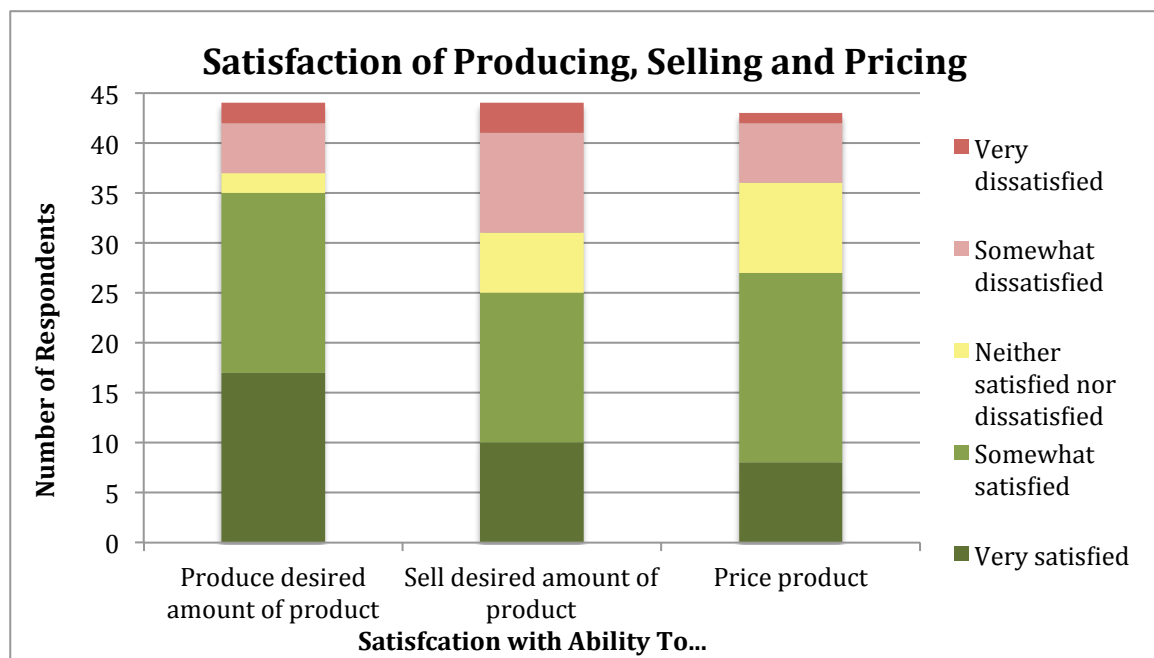
One other common response was “lack of time.” Unfortunately, those who gave this response did not give more details about which aspect of time management was challenging for them, but this is perhaps worth exploring in more detail via conversations with producers.

Producers also face **marketing challenges**, such as:

Difficulty Identifying Markets

In the survey, thirty-eight respondents answered the open-ended question of, “What is your biggest challenge in getting your product to desired markets?” The largest percentage of answers (23%) fell into the *identifying markets* category. This covers everything from “reaching managers at the local markets” to “finding producers willing to pay fair prices for superior genetics” (the latter is also be counted in the *pricing* category). What these respondents have in common is that their biggest barriers are finding the right people to buy their products.

Need for More Marketing Information, Especially Pricing



In general, respondents seem satisfied with their ability to produce their desired amount of product, but less satisfied with their ability to price and sell that product. 67% of respondents are “very” or “somewhat” satisfied in their ability to produce desired product, while 43% “very” or “somewhat” satisfied in their ability to sell desired amount of product. 18% are “neither satisfied nor dissatisfied” in their ability to sell desired amount of product, 38% are “somewhat” or “very” dissatisfied in their ability to sell desired amount of product.

In terms of pricing, 47% are “very” or “somewhat” satisfied in their ability to price their products, 27% are “neither satisfied nor dissatisfied,” 27% are “somewhat” or “very” dissatisfied. Given these responses, it could be surmised that producers are content with their level of production in terms of time, labor, efficiency or animal welfare (i.e. non-income related production factors), but not in terms of sales or income, given that they are generally producing the amounts they would like to, but not selling the amount they would like to. It’s possible that pricing and sales are linked, given that if a product is priced incorrectly it can either sell too quickly or not quickly enough.

In the open comment section, cost of production came up as a challenge when determining price. Respondents wrote, “Always wonder how to best capture back farm expenses because costing yarn is so tricky for me,” and “It is costly to raise and then sell lamb for profit.” Others wrote, “I’d like to figure out a decent balance between paying myself what my time and talent are worth, yet remaining accessible to low and middle

income buyers,” “I would like to see less expense to sell my product. That really cuts into my profit and bottom line,” and “It costs so much to process wool that we make little profit.”

During an interview one lamb producer showed interest in a regional index of pricing, asking “What do people pay for lamb locally?” They also felt locked into direct sales because of high costs of production: “Our cost of production varies because though our inputs remain the same, our yields vary.”

High price points were also mentioned as a challenge for distributors and restaurateurs wanting to sell or serve lamb.

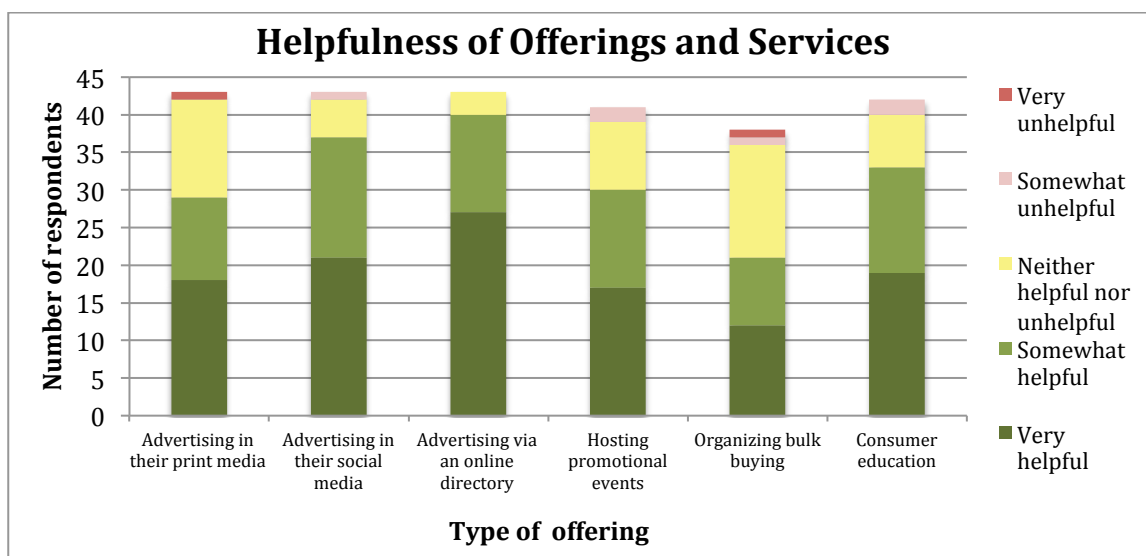
Lack of demand for fiber products

In terms of wool production, only one producer I spoke with earned a significant portion of income from wool or wool products and they had a carefully cultivated customer base. One shearer felt frustrated that many producers are not familiar with wool quality standards, and that instead of assessing the market for what it demands, they try to market something the industry does not want. The general consensus was that until there is a more robust market, with more opportunities for producers, it does not make sense for trade organizations to put more resources into marketing and promoting wool beyond what they already do (Wool Pool, etc.)

What Are Producers Looking for From VSGA?

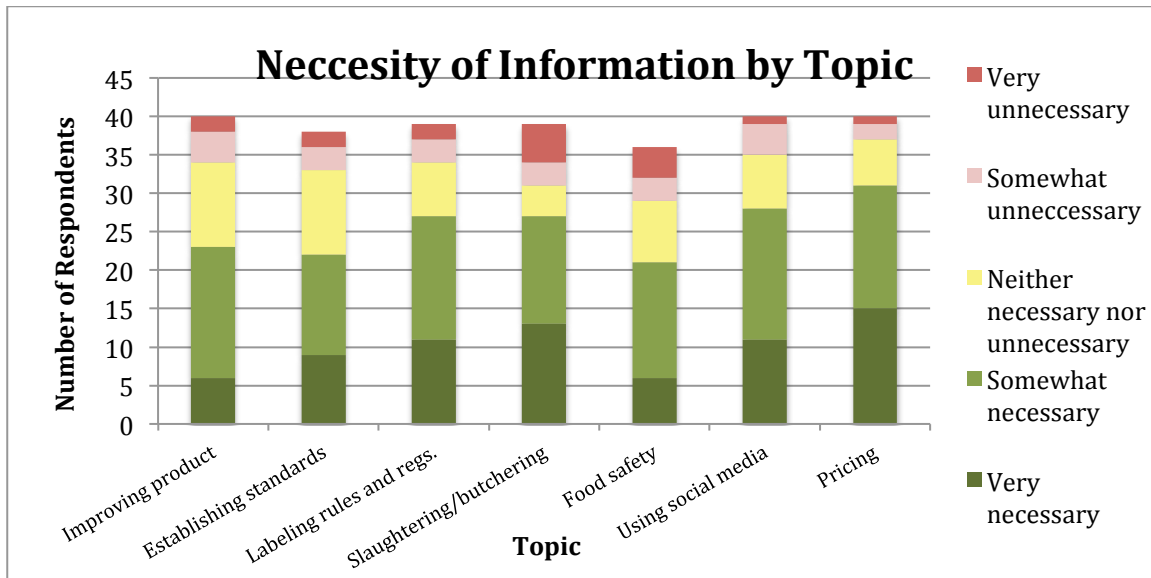
Specific feedback was collected from the survey and interviews in terms of what producers are looking for from VSGA. Though suggestions encompassed a broad range of interests and desires, many also echoed themes found in other parts of the research and helped narrow recommendations to VSGA.

In the survey, respondents were asked about the helpfulness of various future offerings and services.



Respondents are generally interested in the services VSGA could offer, as suggested in the survey. They responded that advertising via VSGA’s online directory would be the most helpful, followed by advertising on VSGA’s social media, consumer education, hosting promotional events, advertising in their print media, and organizing bulk buying.

Respondents also expressed interest in market analyses. 82% said a local market analysis would be “very” or “somewhat” helpful. 73% of respondents said a general marketing analysis would be “very” or “somewhat” helpful, and 67% of respondents said a producer analysis would be “very” or “somewhat” helpful.



Respondents were slightly less enthusiastic about information needed to make their businesses more successful now, or in the near future. Information on pricing was deemed most necessary—78% of respondents rated it “very” or “somewhat” necessary. Information on using social media was second most important—70% of respondents think it is “very” or “somewhat” necessary. Least important was food safety and improving product quality.

What else could VSGA do to help your business?

Answers to the final question of the survey echoed responses to previous questions. Some suggestions that stood out:

- “Would be nice to get the word out that there is a Vermont based sheep/goat association. I only stumbled upon it by chance years ago.”
- “Assist in creating regional marketing campaigns to promote products.”
- “VSGA website could be easier to use for both members and visitors. Moving product from farm to end user whether that be retail outlet, restaurant or similar, or consumer.”
- “Provide more information for dairy goat owners.”
- “The slaughter house problems are the biggest draw back and have caused the most problems. Large lambs swapped for smaller ones and poor cutting are the biggest draw back to this business.”
- “The Sheep and Wool Festival is the most important thing that the association does to help my business. The only other thing I could suggest would be for VSGA to have a collaborative booth at some of the larger festivals to promote Vermont farms. Perhaps the Maryland Sheep Fest. or Rhinebeck.”

- “Better instructional help with local markets.”
- “Not sure what the options are or budget. What % of members do fiber? Is it worth having a sub committee work directly w/ fiber farmers?”

From the interviews, a sheep farmer suggested, “Continuing to advocate for resources from UVM Extension would be very useful.” And two different goat producers commented, “I have a hard time making the workshops—is there a way to get more information online? Could pasture walks be video-tapped?” A valued-added goat’s milk producer recommended, “Either organization [VGFA or VSGA] could develop a relationship with the media. For example, Jim Harrison [of Vermont Retail & Grocer’s Association] has a really beneficial relationship with Local News 22.”

Finally, many survey respondents wrote in to say, “Keep up the good work!”

Short-term Recommendations for VSGA

Many of the challenges grass-based producers face are opportunities for VSGA to provide support. Thus VSGA has the following **producer-oriented opportunities**, listed in order of priority:

- 1. Use existing educational resources to continue to educate producers via website, listserv and social media (see Appendix A).**

UVM Extension, NOFA, the Intervale, and their counterparts in other states have many resources for beginning to experienced small-scale farmers. In fact, there is so much information that one valuable service that VSGA could provide is curating and guiding members to that information. Engaging members in social media is a good way to communicate information to members, as well as engaging them in dialogue as a way to keep a pulse on member issues. This must be done on a consistent, frequent basis or it will not be effective. Marketing experts recommend posting on Facebook at least 3x per week.⁹ However, quality trumps quantity. “The biggest takeaway here is this: Don't overwhelm your customers with content on Facebook, and be selective about what you're publishing. In other words, spend more time crafting better Facebook posts, and less time crafting a lot of Facebook posts.”¹⁰ The new website will also be an excellent place to provide and feature how-tos for members.

One mnemonic that is useful is the 80/20 split: 80% of posts should be community engagement/ 20% should be about products. Community engagement means asking questions to encourage dialogue and interaction, featuring stories and photos that will make followers want to comment and share—anything that will make viewers want to *do something*, rather than just passively scroll. Avoid re-posts and links with no personal connection. VSGA's “products” are membership subscriptions, tickets to the Annual Conference, pasture walks and other offerings. VSGA could use social media and their website to encourage more membership subscriptions.

In terms of content, VSGA should focus on:

- Marketing: Give members general marketing how-tos, especially how use social media, build a website, do their own market research, assess markets and use marketing data
- Product Attributes: Teach members how about how to evaluate taste, consistency, and quality of their products.

⁹ Knights, Pam. “Developing Your Farm Brand: How to Identify Your Unique Attributes & Incorporate Them into Your Marketing Communications.” NOFA Vermont Winter Conference. University of Vermont, Burlington, VT. 15 February 2016.

¹⁰ <http://blog.hubspot.com/marketing/facebook-post-frequency-benchmarks>

- c. Pricing products: Teach members how to price products, how to control cost of production, and communicating with consumers about price.

2. Advocate for member resources from UVM Extension and other organizations.

This suggestion ties closely to the previous one, as UVM Extension is likely to have more resources available for research than VSGA. Some sheep and goat producers also feel there is not enough technical service available to them, especially in terms of herd health.

3. Provide research data for members.

Survey respondents and interviewees expressed a desire for more research data, including, but not limited to, marketing data. Benchmarks for cost of production, in-depth research about local markets, and advanced grazing and production information are priority subject areas.

In addition to the opportunities listed above, VSGA has several **consumer-oriented opportunities**, listed in order of priority:

4. Develop promotional materials for specific grass-fed products, including information about price points.

Examples of promotional materials include:

- Brochures for consumers and restaurants/distributors explaining benefits of buying grass-fed, including health benefits, environmental sustainability, improved animal welfare, taste etc. (see Appendix B).
- One-page synopsis (see Appendix C).

5. Develop promotional materials for buying in bulk, buying and preparing frozen meat, preparing less popular cuts, and eating seasonally.

6. Attend consumer-facing events and sample member products.

Events are an excellent opportunity to feature VSGA member products, as well as advertise the organization. Tom Bivins, the Executive Director of Vermont Cheese Council, explained that most of their consumer education happens at events and festivals. He tries to go to as many as possible, “I could go to one every day if I had time. I also

support other industry festivals—if the cider makers are starting a festival I go to that too.”

Additional Recommendations for VSGA

7. Build Producer Relationships

Many interviewees expressed a desire to collaborate with VSGA, however they were also careful to point out certain differences in mentalities among producers. One cheese producer says, “I would be willing to collaborate or work with the trade associations but there has to have an economic drive to it. Everything I do, I have to think about ‘Is this going to make me money?’ which is a very different lens from a hobby farmer.” Another goat dairy farmer concludes, “The biggest barrier is [small producer] mindset. I spend a lot of time setting up a model [for farmers] that producers don’t want to adopt.” For farmers who already feel crunched for time, it is important that non-farm hours are spent on building relationships that are mutually beneficial. A second cheese maker explained that they want to share information but aren’t interested in conversations with non-commercial producers whose issues are not related to theirs.

8. Continue Collaborating with Other Agricultural Organizations

One of the areas of greatest potential for VSGA is inter-organizational collaboration. VSGA has the opportunity to work with other agriculturally based organizations to disseminate information, share resources and build connections. Producers and services providers almost unanimously mentioned the importance of organizations, especially those that work with and represent farmers in Vermont, working together. From pasture walks to festivals, almost all interviewees discouraged organizations from “trying to do it all”, thus leading to “wasteful inefficiencies”, and instead focus on “collaborative programming that we would all benefit from.” Producers also felt limited by time and money and hoped organizations would work together so that they could benefit from and participate in communities they are not directly connected to. I specifically received recommendations from producers for VSGA to work with the Vermont Grass Farmers’ Association and the Vermont Cheese Council. Tom Bivins echoed the sentiment saying he would be “happy to collaborate.”

A Note on Paid Staff

The challenge VSGA faces is that it will be difficult to take advantage of short-term opportunities without **hiring additional staff or an executive director**. Board members already seem to be operating at capacity with their board duties and professional

responsibilities, and the aforementioned recommendations will take a considerable amount of time and effort.

Looking at the Long-Term

VSGA has the opportunity and challenge of representing a wide variety of producers. The opportunity lies in bringing together different types of producers and sharing information and experience. The **challenge** is lies in VSGA's **ability to represent a diverse group of members and potential members, particularly given the size and resources of the organization.**

If members and potential members are grouped into two categories, production-oriented and non-production oriented, it is clear, given the information collected from the survey and interviews, that the needs of non-production oriented farmers are considerably different from the needs of production-oriented farmers. Multiply those two categories by the number of different products members produce and the result is a very wide range of industry opportunities and challenges, and producer needs and desires. Furthermore, **production-oriented farmers** with whom I spoke communicated a **lack of interest in joining VSGA** as long as they continue to focus on the needs of non-production oriented members.

One question that emerged from discussions involving this issue: In Vermont, **how many members** and potential members are there in each production category, **what stages of development** are they in (beginning, growing, etc.), and **what are their sizes?**

To get a truly accurate picture of producer demographics in all of those categories would take a considerable amount of research, but looking at the USDA's agricultural census data for Vermont can help flesh it out.

Wool Production			Sheep and lambs sold	
	# of Farms	Value	# of Farms	Value
Total	663	\$65,000	423	\$2,149,000
Farms with Inventory of...				
1-24	490	\$17,000	257	\$390,000
24-99	157	\$32,000	147	\$721,000
100-299	7	(D)	7	\$212,000
300-999	9	(D)	12	\$826,000

Data from the USDA’s 2012 Agricultural Census¹¹ tells us that of the 663 farms that keep sheep and lambs for wool production 74% keep between 1 and 24 sheep. This represents \$17,000 of the \$65,000 total value of wool (26%); meaning average earnings are \$34 per farm. In contrast, 423 farms sell sheep and lambs and, though the majority (61%) also keep 1 to 24 sheep—which represents \$390,000 of the \$2,149,000 in sales for that industry (18%)—, the average earning for each farm is about \$921, about 27x as much as their wool-producing counterparts.

Item	Inventory	Sales	
	# of Farms	# of Farms	Value
Goats, all	457	175	\$546,000
Angora goats and kids	46	7	\$12,000
Milk goats and kids	277	125	\$460,000
Meat goats/other goats	198	58	\$73,000
Mohair clipped	(x)	39	\$4,000

The census data for goats is not categorized by size, but rather by product. The data is split into two sections, farm inventory and farms sales. What this shows us is that there are a little over 2.5x as many farms with inventory as actually selling product. Farms selling milk or milk products are also earning about 3x as much money in sales per farm compared to other products. Averages are \$1,714/farm for angora goats, \$3,680/farm for milk goats, \$1,258/farm for meat goats, \$102/farm for mohair. Averages calculated in this way are often not representative of actual earnings because there can be such a wide variety of incomes and outliers, however it still gives us general sense of sales trends.

If VSGA learns 1) **how many farms currently exist in Vermont producing specific products**, 2) **how big those farms are**, and 3) (very approximately) **how much they earn on those products** 4) **are the farmers production-oriented or non-production oriented**, and combine that with the opportunities that exist in each industry, they can start to get a picture of who might encompass current and future membership and what their needs might be.

Once that is clearer, VSGA can then decide what kind and how much support they want to give to each type of producer. Several of the services providers I spoke with also emphasized not trying to do too much at once: “Start by doing a few things well, and build from there. Ask, ‘What do I need to do to advocate for my members? Which needs aren’t being met by other organizations?’” By thinking about services provided by other

¹¹http://www.agcensus.usda.gov/Publications/2012/Full_Report/Volume_1,_Chapter_1_State_Level/Vermont/st50_1_028_031.pdf

organizations, it also opens up opportunities for collaboration as well as reducing potential redundancies.

The **major long-term recommendation** for VSGA is to **keep careful track of what resources** (time, money, etc.) **are benefiting which members** (sheep, goat, production-oriented, non-production oriented). By knowing where resources are going, VSGA can accurately assess whether or not those resources are making a measurable difference for member farms and businesses. Furthermore, they can be deliberate about **what kind of organization they want to be**, and **how they want to be perceived in the sheep and goat industry**.

Conclusion

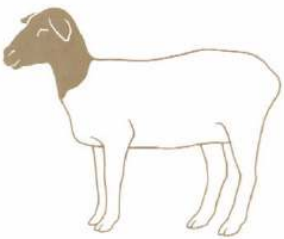
Thus far VSGA has done an excellent job for representing its members and members in general seem satisfied. However, in order to continue to do so VSGA will have to **decide where to focus its energy and resources**. That decision will not only shape VSGA internally, but will also affect how members and potential members perceive VSGA externally. This long-term strategy is essential in order for VSGA to make effective short-term decisions.

Appendix

Appendix A: Producer Resources: share-able links

- Business Planning
 - <http://www.nebeginningfarmers.org/resources/guides/farming-guide/>
 - <http://nofavt.org/programs/farmer-education-services/farm-business-planning>
 - <http://www.vhcb.org/Farm-Forest-Viability/>
 - <http://www.uvm.edu/extension/agriculture/business/>
 - http://www.uvm.edu/extension/community/?Page=business.html&SM=business_menu.html
 - <http://www.vhcb.org/Farm-Forest-Viability/resources/>
- Markets and Marketing
 - <http://www.tastyeasylamb.ie/#>
 - <http://nofavt.org/programs/farm-consumer-0/farmers>
 - http://agriculture.vermont.gov/producer_partner_resources/market_access_development
 - http://agriculture.vermont.gov/sites/ag/files/pdf/meat_industry_development/Consumer%20Valuation%20of%20Meat%20Processing%20Market%20Analysis.pdf
 - http://blog.uvm.edu/farmvia/?page_id=26
 - <http://smallfarms.cornell.edu/resource-guide-to-direct-marketing-livestock-and-poultry/>
 - <https://blogs.cornell.edu/nebeginningfarmers/files/2012/03/Market-Channel-Assessment-14nqgta.pdf>
- Pricing
 - http://www.uvm.edu/newfarmer/?Page=marketing/price/pricing_index.html&SM=marketing/sub-menu.htmls
 - <https://www.ams.usda.gov/market-news/local-regional-food>
 - <https://www.ams.usda.gov/market-news/goat-reports>
- Research
 - <http://www.intervale.org/what-we-do/research/>
 - <http://www.uvm.edu/sustainableagriculture/?Page=whatwedo/index.php>

Appendix B: Example of a Promotional Brochure¹²




DORPER: THE CHAMPAGNE OF LAMB
Developed in South Africa during the 1930s as a cross of the Black Headed Persian and Dorset Horn, the Dorper was bred for its lean, tender meat, its broad frame and ideal muscling. In addition to its rich flavor and tenderness, research tests show that, when cooked, Dorper meat actually shrinks less than meat from other standard favorite North American breeds.

Dorpers are hardy and mild mannered, and do exceptionally well in varied and extreme environments. So, lucky for us, neither Iowa's winters nor hot dry summers are able to dim their innate ability to thrive and produce wonderful meat.

"OH THE RECIPES YOU'LL TRY"


During recent years, lamb has been experiencing a revival in the U.S. The blossoming of ethnic restaurants is providing a delightful array of new menu ideas for at home cooks. And, the interest in American family roots has brought back dishes and foods from the first half of the 20th century and before for rediscovery and redefinition.

At the same time, traditional American lamb dishes and cultural hybrids like our favorite, barbeque lamb, are showing up at fairs, family gatherings and local restaurants. There are many recent cookbooks that provide delectable recipes using lamb—for the beginner and the adventurous alike. And, there are many web sites with recipes and cooking tips. Among our favorites are:



PLANNED LAMB SHEEP FARM
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Clarkeville, IA 50649
Telephone: 319.276.4400
e-mail: scotttw@bailen-broemer.com


PLANNED LAMB SHEEP FARM
Bred and Raised To Produce Outstanding Quality Meat



— WINTER HARVEST —

Pasture Raised Lamb

"Tender, Lean And Succulent"




"The Champagne of Lamb"

THE DELICATE, WORLDLY FLAVOR OF LAMB
PERFECTED ON IOWA PASTURE

Lamb is a meat that's long been appreciated around the world for its sweet, mild and complex flavor — from Europe to Africa, India, Mexico and North America. Now, our gently rolling Iowa meadows are proving to be a perfect home for raising the perfect lamb.

We've selected and raise only the Dorper breed, developed solely for the quality of its meat.


With naturally suited outdoor pasture life and diet, and our winter harvest cycle, we're able to bring out the best in the outstanding qualities the Dorper has to offer.



BORN AND RAISED ON GRASS —
NOURISHING EVERYONE

All of our animals are born, weaned and raised on our pastures, so we can guarantee that they're healthy and always have been. They spend 95% of their time on pasture, getting plenty of fresh air and clean water as they roam year 'round on a circuit of large open plots.

They derive the bulk of their nourishment from pasture plants, including tender grasses, clovers and other legumes. This is the diet natural to sheep, and therefore provides them optimum nutrition and health. In turn, they produce a lean, healthy, nutrient dense and protein rich meat.



WINTER LAMB: A SEASONAL DELICACY

Between November and February is harvest time for our Dorpers, for one reason and one reason only—that's how we can produce our finest, most succulent lamb.


Our winter harvest is dictated by an annual cycle for spring lambing. With this calendar, we give the ewes a diet of the best spring pasture growth to provide them optimum nourishment and energy as lambing approaches. As a result, the lambs are given the best possible start nutritionally. The first several months of their lives they're feeding and growing on the pastures when the plants are most lush. By working with the seasons, we reduce livestock stress, enhancing their ability to succeed and produce exceptional quality meat.

An added benefit of this calendar is that it makes our lamb available when domestic supplies normally diminish during the winter.

HEALTHY LAMB AND HEALTHY LAND

We're committed to produce the most healthful and flavorful lamb possible. So, we don't administer growth hormones or antibiotics. With the livestock's healthy outdoor life they're not needed. Nor do we feed our sheep any animal byproducts. They're not needed, either.

What's healthy for lamb is healthy for our land. Pasture cover naturally enriches the soil and prevents erosion and runoff while providing habitat for wildlife. And pasture farming dramatically reduces the need for heavy machinery and high energy inputs required to plant, harvest, process and distribute feed. As grazing sheep feed themselves, they not only get exercise, but help preserve the environment.



LOCAL PROCESSING: STATE OF THE ART / FAMILY OWNED / HUMANE CRAFT METHODS


Wonderful meat can only be as good as the last stop before going to market — the meat locker. So, we've partnered with an outstanding regional processor, Edgewood Meats.

Edgewood has been a local family operation for decades. They combine state of the art USDA inspected facilities and food safety management with a tradition of expert cutting by hand. Their methodical craft approach and humane handling, without the hurry typical of large industrial plants, is better for the livestock and, in turn, ensures both food safety and premium meat quality.

¹² <http://extension.missouri.edu/sare/documents/plannedlamb.pdf>

100% GRASS-FED ANGUS BEEF

FACT SHEET



SILVER FERN FARMS

ANGUS

NEW ZEALAND BEEF

- 100% Grass Fed
- Pasture Raised – Never in Feed Lots!
- Never Grain Finished
- No Hormone or Antibiotic Growth Promotants
- GMOs are Illegal in New Zealand
- Verified Black Angus
- Consistent Cut Sizes & Quality
- Meets Strict Certified EU Standards
- Certified Halal
- Darker, Richer Color

STATS

Diet: Grass – typically rye mixed with clover
Average Live Weight: 1,405lbs
Average Dressed Weight: 661lbs
Average Age: 26 months

SUSTAINABILITY

Closed Loop



1. Eat Grass
2. Droppings Fertilize Grass
3. Hooves Aerate Soil
4. Grass Grows

NEW ZEALAND'S CLIMATE:¹

The Perfect Climate for Year Round Grazing

Temperate Climate
-Temperatures Ranging from 50°F to 60.9°F

Abundant Sunshine
– 1,800+ Hours Per Year

Plenty of Rainfall
- 23.6" to 63" Annually

No Snow in Grazing Areas

CONSISTENCY:

Consistent Quality
Consistent Cut Sizes
Consistent Year Round Supply

¹Te Ara Encyclopedia of New Zealand
<http://www.teara.govt.nz/en/climate/page-1>

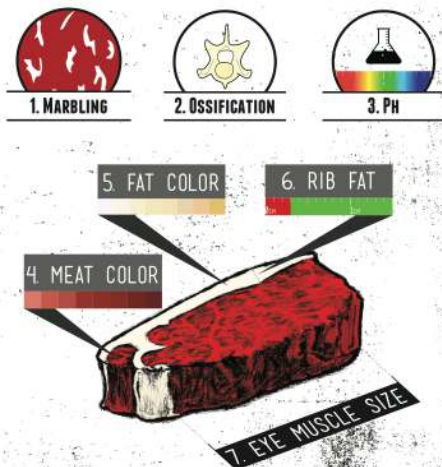
MORE INFO: NEWZEALMEATS.COM

Appendix D: Example of a Meat Fact-Sheet



HOW THE EATING QUALITY (EQ) SYSTEM WORKS

GRADING CRITERIA



HOW EQ LEADS TO BETTER BEEF



HOW THE EQ SYSTEM WAS DEVELOPED



(800) 276-5955 x124
sales@nafood.com

