

## AUTHORIZATION REQUEST FOR FY 2012

**AR Title: MARKET RESEARCH**

**Name of Contractor: National Cattlemen's Beef Association**

**CBB Budget Component: Research**

### I. OVERVIEW

**A. AR Description:** This AR includes plans and programs for conducting market research with consumers and other beef industry influencers. It supports several strategies including Product, Industry Resource, Safety and Nutrition. One major goal of this program is to provide the industry with insights into consumer/influencer attitudes and behavior to facilitate improved program planning, maintain a strong marketing climate for beef and help drive beef demand. A second major goal is to gather key tracking data as a basis for spotlighting opportunities or challenges and guiding response for the industry.

**B. Costs Requested from this AR\*: \$1,352,500**

Source of Funding	Total Costs	Direct Costs	Implementation**
Beef Board/BPOC	\$1,157,335	\$1,157,335	
Federation of SBCs (FSBCs)	\$195,165	\$195,165	
Other Sources ( <i>describe</i> )			
<b>Total Funds Requested</b>	<b>\$1,352,500</b>	<b>\$1,352,500</b>	

\* Only Direct Costs are being requested in this AR.

Total estimated Implementation for this AR is \$773,751; implementation by Tactic in Table IV.

\*\* Implementation for this and other RESEARCH ARs requested in separate AR R-05-2012.

**C. Start date: 10/1/2011**

**Completion date: 12/31/2012**

### II. PLANNING INFORMATION FOR THIS AR

**A. Long Range Plan Core Strategies/Strategic Initiatives Addressed by This AR:**

- **Improve domestic consumer preference for beef**
  - Identify and track consumer needs and preferences
  - Collaborate with industry stakeholders (Producers, Processors, Foodservice, Retail) to develop and implement demand generation initiatives based on consumer needs and preferences.
  - Develop and execute creative communication initiatives to improve consumer understanding of the beef production system and increase consumer confidence in the safety of beef.
  - Create stronger relationships and more consistent communication with meal-time decision makers.

- Identify and capitalize on growth opportunities with targeted market segments (e.g. ethnic, generational, attitudinal, etc.).
- **Strengthen the image of beef and the beef industry**
  - Engage all industry segments to develop and consistently communicate our positive beef production story.
  - Capitalize on the history, heritage and brand equity of family-based production agriculture and the farming/ranching lifestyle
  - Promote our industry's commitment, ongoing investment and progress in ensuring beef safety.
  - Strengthen efforts to proactively anticipate and respond to attacks on beef and the beef industry
- **NCBA Initiatives Addressed by This AR:**
  - Increase consumer confidence in selecting and preparing beef
  - Contemporize beef to capitalize on consumers' diverse needs
  - Establish beef as an everyday part of a healthy diet
  - Provide consumer/operator guidance on economizing with beef
  - Unite and lead the industry to solve beef safety issues
  - Demonstrate beef is socially responsible
  - Reshape the conversation about modern beef production

**B. Committee That Reviewed This AR:** Joint Market Research Working Group

**C. Committee Recommendations for This AR:** The Joint Market Research Working Group recommends this AR to the Operating Committee for funding in FY 2012.

### III. PROGRAM INFORMATION FOR THIS AR

**A. Strategy 1: Product** – Strengthen the value proposition of beef in the marketplace.

**Strategy 1 Proposed Direct Cost:** \$897,500

#### **Specific Tactic Information:**

**Tactic 1A: Foundational Product Research** – Foundational product research involves the purchase/gathering of tracking information related to consumer attitudes/usage of beef, plus beef's ongoing competitive position in the marketplace. This information is analyzed to further industry perspective and support program development. Insights are widely disseminated, with findings integrated into internal planning presentations, outbound PR, state trend overviews and channel member presentations focused on opportunities for increasing demand.

#### NATIONAL EATING TRENDS

Purchase and synthesize National Eating Trends (NET) data that provides in-home eatings/servings across a wide number of criteria (e.g., demographics, form, day parts, etc.). An in-depth annual report on beef consumption trends is received. Data is updated quarterly, allowing for strategic ad hoc inquiries throughout the year. Information is used to

provide insights for key planning meetings and to respond to ongoing requests from key industry stakeholders (e.g., packers, channel partners, etc.). Data is collected via NET's in-home diary methodology among 2,000 consumers per annum. This information has been collected for over 20 years by NET, providing the industry's most comprehensive and ongoing in-home eatings data set. It thus provides the most objective, comprehensive measurement of how beef is actually being consumed in-home, and how successful beef is at matching up with typical meals being served in America today.

#### FOODSERVICE VOLUMETRIC/CREST

The annual foodservice volumetric study captures current pounds and dollars of beef and chicken sold into major segments of the foodservice channel. In the past, this study has been conducted against both commercial (full service, limited service) and non-commercial sectors (eg. lodging, education) of the industry. Research is conducted in the September-October timeframe among foodservice procurement executives nationwide. Information provides tracking intelligence for the checkoff foodservice program as well as supporting other channel related efforts like advertising and new product development. As an option in 2012, market research would like to explore shifting to a strategy of conducting a smaller foodservice volumetric study every other year, and deploying the dollars saved to acquire CREST data. The foodservice volumetric study tells us how much beef the restaurant industry is buying, CREST tells us the menu items the consumer is buying.

#### ADVERTISING AND BRAND TRACKER

The checkoff advertising and brand tracker provides an annual measurement of how beef's current advertising and brand is performing relative to chicken, pork, turkey, shellfish and fish. The tracker measures attitudes and behaviors about beef among a nationally representative sample of 600 consumers (300 food and health involved, 300 food and health involved influencers). The value is measured by comparing attitudes of consumers who have seen or heard the advertising versus those who have not. The advertising program sets benchmarks based on this data and targets for improvement year over year. In 2012, the market research staff plans to run the existing tracker, which uses older online techniques, with a new version of the tracker. This switchover strategy is typical, allowing for continuous tracking, while migrating to a look and feel the consumer is more comfortable with today.

#### ▪ **Measurable objectives:**

- Provide two presentations of NPD/NET trends to key program managers (e.g., product, nutrition, culinary) to help shape strategic direction.
- Present NET insights at 1-2 significant industry planning events.
- Provide summary report of foodservice sales to channel marketing team to help shape their communication and interaction with key stakeholders by February 28.

- Provide summary report of ad/brand tracker results by December 31 to advertising program management in support of potential adjustments to current campaigns.

▪ **Proposed Direct Cost:** \$318,000

**Tactic 1B: Channels of Distribution** – Identify new opportunities for testing the sales impact of new beef items in the retail and/or foodservice channels.

#### NEW BEEF SOLUTIONS FOR RETAIL

A portfolio of 24 convenient fresh beef items has been developed, and initial consumer testing completed. A subset of these products will be tested in the grocery channel, and research conducted to determine consumer reaction. The portfolio of products can be stocked in the fresh meat case, and can be simply prepared and cooked by the consumer in 30 minutes or less. Many will help to make beef an everyday, anytime choice, and expand beef into new exciting dishes.

#### NEW BEEF SOLUTIONS FOR FOODSERVICE

Foodservice operators are increasingly looking for alternative ways to offer beef - with a desire for health, affordability and uniqueness driving their decisions. The BAM cuts, plus additional filets, plus other solutions which have already been tested with consumers, will be tested in a foodservice setting as new potential beef demand generators.

▪ **Measurable objectives:**

- Conduct a test in foodservice of 1-2 new items that use a new cut of beef, or a cut that is prepared in a significantly different way.
- Conduct a test in the grocery channel of 3-4 new beef items that have been developed during the Convenient Fresh Beef testing process over the last 2 years.

▪ **Proposed Direct Cost:** \$160,000

**Tactic 1C: New Product Development** – Support the introduction of new beef products through consumer and / or chef testing.

#### NEW PRODUCT TESTING

This research will build on existing efforts to define and develop new convenient products that will allow beef to maintain its leadership position and be the easy choice for busy consumers. Consumer research will also support development of beef products, with a focus on testing products derived from new fabrication solutions from whole muscle cuts. New product research is gravitating towards an emphasis on in-home and sensory testing and focus groups. Work is conducted on internally developed new products and with products being developed by key channel members. The intent in both cases is to push new products towards commercialization.

KILLER APPLICATION TEST (term used in the high-tech industry to verbalize applications that drive significant business)

Very simply, what beef applications, beyond center of plate steaks, burgers and ground beef crumbles, could generate the most incremental volume for beef. This research will help establish a roadmap of applications that can increase beef sales, thus helping to prioritize new product, recipe and cooking knowledge efforts in coming years.

▪ **Measurable objectives:**

- Conduct 1-2 tests among chefs and / or consumers to test early stage beef cut/product solutions that product enhancement, the Beef Innovations Group or channel members identify as new solutions.
- Test and rank order product/end dish “opportunities” that have the greatest opportunity to significantly impact beef demand. This information will help provide focus in the future on those beef applications that deserve the most attention by culinary, communications, and product development.

▪ **Proposed Direct Cost:** \$211,500

**Tactic 1D: Enhancing the Beef Experience** – This tactic will focus on those areas where we seek to improve or document the beef experience among consumers. Studies will test creative options for the next generation of consumer ads, document trends in flavors matched with beef meals, document the increasing popularity of grilling and test the consumer appeal of alternative approaches for same day defrosting of beef. All of these studies will help to inform internal teams on the best approach for interacting with consumers. Assist program managers with additional research and analysis to optimize checkoff investments as opportunities are presented.

ANNUAL GRILLING STUDY

Conduct annual grilling survey to provide data for Food Communications use in programs to promote summer grilling. This survey is developed in coordination with Food Communications and is designed to gather basic data on consumers’ relationship with beef and the grill as well as data to support specific summer grilling promotional themes.

CREATING CRAVE / FLAVOR TEST

This research was previously conducted in 2002 and again in 2006. The culinary team is interested in updating the results of this research for a publication called “Creating Crave,” a publication targeted to foodservice professionals. This study will help determine preferences for beef product preparation and consumption at several levels including preferred cuts, degree of doneness, types of preparation methods and flavors used in beef preparation. The research will also gather general information related to ethnic food eating behavior, food preparation habits and level of interest in food preparation information sources.

DEFROSTING TEST

Studies conducted in 2010 and 2011 unearthed an unexpected barrier to beef consumption – the inability of consumers to easily defrost beef for same day usage. Current information provided to consumers about defrosting beef centers around defrosting in the refrigerator overnight which does not fit well into the lives of busy consumers who, more than 75% of the time, decide on their dinner meals the same day rather than the day before. The culinary team will test alternatives that will help consumers solve this issue, and market research will test the willingness of consumers to embrace a new defrosting recommendation.

ADVERTISING CREATIVE TEST

Every 2-3 years the advertising team tests creative print approaches to determine which will have the greatest positive impact on consumer's interest in beef. Consumer research conducted in the 2012 AR would inform a potential migration in the campaign in 2013.

- **Measurable objectives:**

- Conduct a study of 1,000 consumers who grill in Spring 2012; work with Food Communications to incorporate survey data into press releases, fact sheets and other consumer communications materials to promote summer grilling of beef.
- The 'Creating Crave' study will follow the methodology used in the 2006 study, that being an online survey among 1,000 beef eaters with a booster sample of a total of 100 each of Asians, Hispanic populations to ensure a robust enough sample to analyze by ethnicity
- The Defrosting study will be conducted using an in-home usage test among consumers to test the viability of recommended defrosting instructions created by the culinary team.
- The Advertising Creative test will consist of focus group discussions among consumers across three different cities in the USA. In addition, a small online survey may be conducted to establish a quantitative read of the most preferred new creative campaigns.

- **Proposed Direct Cost:** \$208,000

**B. Strategy 2: Industry Resource** – Provide knowledge resources and guidance to help strengthen the marketing and business climate for beef.

**Strategy 2 Proposed Direct Cost:** \$390,000

**Specific Tactic Information:**

**Tactic 2A: Consumer Beef Index** - Provide annual tracking update of consumer perceptions most correlated with beef satisfaction, directly supporting and providing measurement of the Beef Industry Long Range Plan core strategy of improving domestic consumer preference for beef. Additional analysis will be conducted to dig deeper on special targets of

interest (e.g., Generations) or to unearth attitudes which are correlated with superior or inferior beef preference and image.

### CONSUMER BEEF INDEX (CBI) TRACKER

Conduct two CBI studies (February and July FY 2012) to measure consumer attitudes and behavior related to beef and competitive proteins, and perceptions of the beef industry. Each study will be completed online with a total of 1,000 nationally representative consumers.

#### ▪ **Measurable objectives:**

- Present current findings and trends analysis of CBI to program staff in April 2012 to help assess the state of consumer satisfaction with beef.
- Present current findings and trends analysis of CBI to program staff by November 2012 as FY 2013 beef industry priorities are being shaped.
- Present CBI findings to at least 10 beef industry audiences by September 30, 2012 (e.g., packers, retailers, foodservice operators, state beef councils).

▪ **Proposed Direct Cost:** \$90,000

**Tactic 2B: Beef Industry Image** - Studies to analyze public and influencer perceptions of the beef industry. Research provides strategic guidance for programs to strengthen beef as a socially responsible industry that preserves the environment, protects our livestock, provides quality food for consumers, strengthens food safety, invests in our communities, embraces innovation and creates a sustainable future. This supports the Beef Industry Long-Range Plan core strategy of strengthening the image of beef and the beef industry.

### PUBLIC PERCEPTIONS OF THE BEEF INDUSTRY

Conduct a study to analyze perceptions of the beef industry as a socially responsible industry to support development of proactive strategies to maintain and strengthen consumer trust in the beef industry and specifically farmers and ranchers.

### MODELING THE MYTHS

Conduct an economic and social analysis to “model the myth” and explore what would happen to the food supply, nutritional adequacy of the diet, the economy and the environment in the United States if we applied the critics’ logic to beef production and shifted completely to small, grazing-based production systems using minimal technology.

#### ▪ **Measurable objectives:**

- Establish measures of public perceptions of beef and beef production that will be tracked going forward as the Industry Long-Range plan is carried out.
- Develop and disseminate a report that presents a comparison of the current U.S. beef production system (which is a combination of technology-based intensive systems and extensive grazing-

based systems) with a system using only extensive production practices in terms of economics, food availability, nutritional adequacy and social structure.

- **Proposed Direct Cost:** \$65,000

**Tactic 2C: Analyze Consumer Barriers** - There is a range of barriers that inhibit consumer acceptance of beef or, at the least, prevent them from consuming it more frequently. Some of these barriers relate to misperceptions about how beef is produced, others are about beef's nutrition profile and some stem from an acceptance of myths about beef. Others relate to a need for consumer education about selecting and preparing beef and about affordable ways to keep beef in their diets. Market research will design and conduct studies to identify and analyze major barriers to consumer acceptance of beef.

#### LIMITERS OF BEEF CONSUMPTION

As part of ongoing efforts to promote beef, checkoff studies have monitored consumer concerns regarding beef and have identified reasons that some consumers hesitate to eat beef. A better understanding of the relative strength of the issues and concerns that restrict beef consumption will help guide and prioritize communication and promotion efforts so they focus on those messages that will increase beef consumption. Market research will conduct a study to determine which consumer concerns, issues and preferences have the greatest impact on beef consumption and whether concerns differ between beef users in general and those in specific target groups.

#### COMMUNICATING VALUE ALTERNATIVES

With high costs for gasoline and energy and continuing food price inflation, consumers are seeking ways to reduce their food costs. 2011 checkoff research has shown that most consumers have continued the frugal food shopping behavior they adopted in the recent recessionary period. For many, one strategy for reducing food costs is to trade down and buy fewer, and less expensive, beef cuts or to trade out and buy chicken instead. The industry needs to find ways to better position beef as an affordable food. Market research will explore consumer response to a range of positioning strategies such as price per portion, price per meal, bulk purchasing, slicing your own steaks, value cuts and a number of other options as strategies to keep consumers in the beef category.

#### BARRIERS OF BEEF SELECTION/PREPARATION

An important cross-organizational program to increase consumer confidence in cut selection and preparation is the building of the Beef Knowledge Center. This storehouse of information can be accessed to help answer key questions, either by the consumer or culinary intermediaries. Market research will poll consumers on the areas they most want help on to inform the initial focus of the Beef Knowledge Center. The study also can determine how best to connect consumers with the Beef Knowledge Center.

MYTHBUSTER SURVEY

Conduct research to identify the most commonly believed beef myths among consumers to support an Issues and Reputation Management truth or fiction program designed to create improved consumer acceptance of beef.

TRENDS INTELLIGENCE FOR THE AGRI-FOOD CHAIN

Synthesize and disseminate information from Food Foresight, the University of California Davis Center for Food and Agriculture Research trends intelligence program. Food Foresight data supports anticipating, planning for and managing trends and issues that can impact the agri-food chain and the beef industry. Food Foresight supports management of food trends and issues for Consumer Marketing, Issue Management and Food Communications and informs Market Research regarding consumer trends to be analyzed from the beef industry perspective. It also will help guide planning for 2013 priorities and initiatives.

- **Measurable objectives:**

- A second wave of the online limiters of consumption study will identify shifts and compare the strength of all issues that are restricting consumption of beef.
- An online consumer study analyzing consumer responses to economical positioning strategies will be conducted to identify ways to proactively improve consumer perceptions of the value of beef in an environment of rising food prices.
- 8-10 ethnographic shop and cook-alongs will be scheduled to inventory the questions consumers have about choosing and preparing beef. Based on this, a 750 person quantitative survey will be completed to rank order the content needed in the Beef Knowledge Center.
- Consumer survey research will identify commonly believed myths among consumers and determine which have the most impact on consumer acceptance and preference for beef.

- **Proposed Direct Cost:** \$235,000

**C. Strategy 3: Safety** - Protect beef demand by maintaining, enhancing and communicating the safety of beef to ensure the future of the beef industry.

**Strategy 3 Proposed Direct Cost:** \$35,000

**Specific Tactic Information:**

**Tactic 3A: Highlight Safety Successes and Perceptions** - Bring impactful consumer insights on beef safety successes/goals to the 10th annual BIFSCo Safety Summit.

SAFETY PERSPECTIVES: EXPERTS VS CONSUMERS

Conduct a consumer survey to assess attitudes about beef and confidence in beef safety. Compare data to previous measures to analyze improvements in confidence. Provide an online link to the same survey questionnaire to attendees at the Safety Summit prior to the meeting *and ask them to fill out the survey the way they think consumers would fill it out*. Present research findings at the Summit and compare actual consumer responses with the responses from experts.

- **Measurable objectives:**

- Conduct survey research to identify areas where consumer perceptions and confidence in beef safety have improved and where additional effort needs to be focused. Compare consumer perceptions with experts' opinions of consumer perceptions to assess the degree to which the industry is in tune with consumer attitudes about beef safety.

- **Proposed Direct Cost:** \$35,000

**D. Strategy 4: Nutrition** – Strengthen beef's position as a healthful food and as a premier nutritional protein so consumers and influencers feel good about the beef they love.

**Strategy 4 Proposed Direct Cost:** \$30,000

**Specific Tactic Information:**

**Tactic 4A: Eating Personality Validation** - A major PR push next year will revolve around an online tool that clusters consumers into a handful of "beef personality" types and provides recommendations on how to incorporate beef into their daily lives. Market research will be used to test the tool and provide recommendations on enhancing consumer appeal. Assist program managers with additional research and analysis to optimize checkoff investments as opportunities are presented.

- **Measurable objectives:**

- An online study will be conducted with 2-3 individuals of each "personality" type (how many are there?) to help optimize the tool and the willingness of consumers to use the suggestions on how to integrate beef into their lives more frequently.

- **Proposed Direct Cost:** \$30,000

#### IV. DETAILED BUDGET SUMMARY

Strategy and Tactic	Program Manager	Completion Date	Total Est. FY 2012 Budget	Total Direct Cost	Direct Cost by Funding Source			Est. Impl.
					CBB/BPOC	FSBCs	Other	
Foundational Product Research	J. Lundeen/ W. Jenkins	12/31/2012	\$403,113	\$318,000	\$272,113	\$45,887		\$85,113
Channels of Distribution	J. Lundeen/ W. Jenkins	12/31/2012	\$247,692	\$160,000	\$136,912	\$23,088		\$87,692
New Product Development	J. Lundeen/ W. Jenkins	12/31/2012	\$340,459	\$211,500	\$180,981	\$30,519		\$128,959
Enhancing the Beef Experience	J. Lundeen/ W. Jenkins	12/31/2012	\$329,220	\$208,000	\$177,985	\$30,015		\$121,220
<b>Product Total</b>			<b>\$1,320,484</b>	<b>\$897,500</b>	<b>\$767,991</b>	<b>\$129,509</b>		<b>\$422,984</b>
Consumer Beef Index	W. Jenkins	12/31/2012	\$136,425	\$90,000	\$77,013	\$12,987		\$46,425
Beef Industry Image	R. McCarty	12/31/2012	\$129,479	\$65,000	\$55,620	\$9,380		\$64,479
Analyze Consumer Barriers	R. McCarty	12/31/2012	\$400,067	\$235,000	\$201,090	\$33,910		\$165,067
<b>Industry Resource Total</b>			<b>\$665,971</b>	<b>\$390,000</b>	<b>\$333,723</b>	<b>\$56,277</b>		<b>\$275,971</b>
Highlight Safety Success and Perceptions	R. McCarty	12/31/2012	\$65,950	\$35,000	\$29,950	\$5,050		\$30,950
<b>Safety Total</b>			<b>\$65,950</b>	<b>\$35,000</b>	<b>\$29,950</b>	<b>\$5,050</b>		<b>\$30,950</b>
Eating Personality Validation	R. McCarty	12/31/2012	\$73,846	\$30,000	\$25,671	\$4,329		\$43,846
<b>Nutrition Total</b>			<b>\$73,846</b>	<b>\$30,000</b>	<b>\$25,671</b>	<b>\$4,329</b>		<b>\$43,846</b>
<b>AR Totals</b>			<b>\$2,126,251</b>	<b>\$1,352,500</b>	<b>\$1,157,335</b>	<b>\$195,165</b>		<b>\$773,751</b>

#### V. SUPPLEMENTAL INFORMATION

##### A. Will all of the work detailed in this AR be completed by the end of the fiscal year? If not, please provide an explanation.

- The market research AR extends until December 31, 2012. All work is planned for completion by that time.

##### B. Changes from FY 2011 Approved AR:

- Tactic 1D: Enhancing the Beef Experience is a new tactic, with a focus on program areas internally that need consumer data to help build demand.
- Safety has been added back to the AR, to facilitate market research's involvement in preparing for the 10<sup>th</sup> BIFSCO meeting.
- Consumer issues research as a tactical area has transitioned into research on industry image and on analyzing consumer barriers.
- This AR may also pursue opportunities to leverage checkoff funding with third party investments. The cost, both direct and implementation, related to pursuing these opportunities will be allocated between this AR and any other NCBA funding sources which receive the benefit of these opportunities.

### C. Subcontractor information:

- **Name of proposed subcontractor:** IPSOS U.S. Public Affairs for consumer issues research. NPD NET for in-home eatings of beef. Technomics will conduct the foodservice volumetric study. Other contractors will be selected based on expertise in respective areas (e.g., nutrition). Most work conducted related to the target audience (ex. Consumer Beef Index) will be conducted by Pelegrin Research Group due to their deep knowledge of how to recruit this audience, and compare results to historical research conducted. Turover Straus has unique intellectual property in the area of convenient fresh beef solutions that make them a unique partner for a portion of the new product work.
- **Will all work with subcontractors be competitively bid? If not, why not?** Yes, unless the chosen contractor is one of very few contractors with unique credentials to do the job, the contractor has run previous waves of the same research (allowing for most robust comparisons), or there is a clear quality differentiator that overcomes a nominal difference in cost. IPSOS was initially selected on the basis of a competitive bid process. It remains the low cost provider of research services and provides the quick response the beef industry frequently needs by offering both weekly telephone and online opportunities at omnibus rates. NET is the de facto diary panel company for analyzing in-home eatings.

**D. Identify any relationships between this AR and projects previously funded by the Operating Committee:** Some of the research included in this AR is ongoing tracking research that has been funded for a number of years. It is important that the industry stay current on consumer trends and perceptions in order to ensure that the industry is properly responding to changes as they occur.

The work described in the channels of distribution tactic follows on from previous year new product efforts. Products that have been tested in research environments are placed into a grocery chain or restaurant environment to determine how well they perform in a “real world” environment. Data gathered through the Limiters of Beef Consumption research can be compared to baseline data developed in 2008.

### E. Summary of Prior Year AR Budgets and Expenses:

Strategy	FY 2011 Approved Budgets			FY 2011 Actual Expenses (NCBA's as of 5/31/11)		
	CBB/BPOC	FSBCs	Total	CBB/BPOC	FSBCs	Total
<b>Product</b>	\$ 431,300	\$ 63,700	\$ 495,000	\$ 56,910	\$ 8,399	\$ 65,309
<b>Industry Resource</b>	\$ 596,900	\$ 88,100	\$ 685,000	\$ 240,209	\$ 35,466	\$ 275,675
<b>Nutrition</b>	\$ 43,600	\$ 6,400	\$ 50,000	\$ 50	\$ 7	\$ 57
<b>AR Totals</b>	<b>\$ 1,071,800</b>	<b>\$ 158,200</b>	<b>\$ 1,230,000</b>	<b>\$ 297,169</b>	<b>\$ 43,872</b>	<b>\$ 341,041</b>

### F. Historical Summary of Budgets and Expenses:

	Total Approved Budgets			Total Actual Expenses		
	FY 2010	FY 2009	FY 2008	FY 2010	FY 2009	FY 2008
<b>Market Research</b>	\$1,410,090	\$1,314,689	\$ 1,780,600	\$1,184,088	\$1,274,199	\$ 1,694,642
<b>AR Totals</b>	<b>\$1,410,090</b>	<b>\$1,314,689</b>	<b>\$ 1,780,600</b>	<b>\$1,184,088</b>	<b>\$1,274,199</b>	<b>\$ 1,694,642</b>