



Funded by the Beef Checkoff



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2023 EVALUATION OF BEEF CHECKOFF PROGRAMS

A REPORT FROM THE
CHECKOFF EVALUATION COMMITTEE



Funded by the Beef Checkoff

THE MISSION OF
THE CATTLEMEN'S
BEEF BOARD IS TO
SERVE AS STEWARDS
OF THE BEEF CHECKOFF
TO GROW BEEF DEMAND
AND OPTIMIZE
INVESTMENTS
MADE BY BEEF CHECKOFF
CONTRIBUTORS.

INTRODUCTION

The Cattlemen's Beef Promotion and Research Board, usually referred to as the **Cattlemen's Beef Board (CBB)**, along with the **United States Department of Agriculture (USDA)**, oversees the **Beef Checkoff program**, which was established in the Beef Promotion and Research Act as part of the 1985 Farm Bill. The CBB manages the collection of \$1 per head on all cattle sold in the U.S. and \$1 per head equivalent on imported cattle, beef, and beef products. The Board is also responsible for approving the annual Beef Checkoff budget for national Checkoff-funded programs.

Specifically, the CBB funds **Authorization Requests (ARs)** intended to drive the Checkoff's purpose: to stimulate restaurants and grocery stores to sell more beef and encourage consumers to buy more beef. The **Beef Promotion Operating Committee (BPOC)** is the producer- and importer-led body that approves Beef Checkoff-funded programs in the areas of promotion, research, consumer information, industry information, foreign marketing, and producer communications.

To assess the effectiveness of approved Beef Checkoff-funded programs, the **Checkoff Evaluation Committee** reviews evaluation criteria, a requirement of each AR, throughout the fiscal year. It then reports program findings back to the BPOC to help guide future Beef Checkoff program development and investments.




The information in this report is compiled from quarterly and year-end program reports and highlights several activities/events within each program.

THE GOALS OF THIS REPORT ARE TO:

- Highlight what each Beef Checkoff-funded program achieved throughout the fiscal year by reviewing each program's actual results against its intended goals.
- Assess each AR's contributions in driving demand for beef, which can include building a scientific foundation of beef's attributes, launching marketing campaigns, creating educational resources, etc.
- Summarize key learnings from this fiscal year that may guide future programming efforts and help the BPOC evaluate future funding decisions.







FY23 CONTRACTORS/SUBCONTRACTORS

Within the six program areas, the contractors/subcontractors that executed FY23 ARs are:

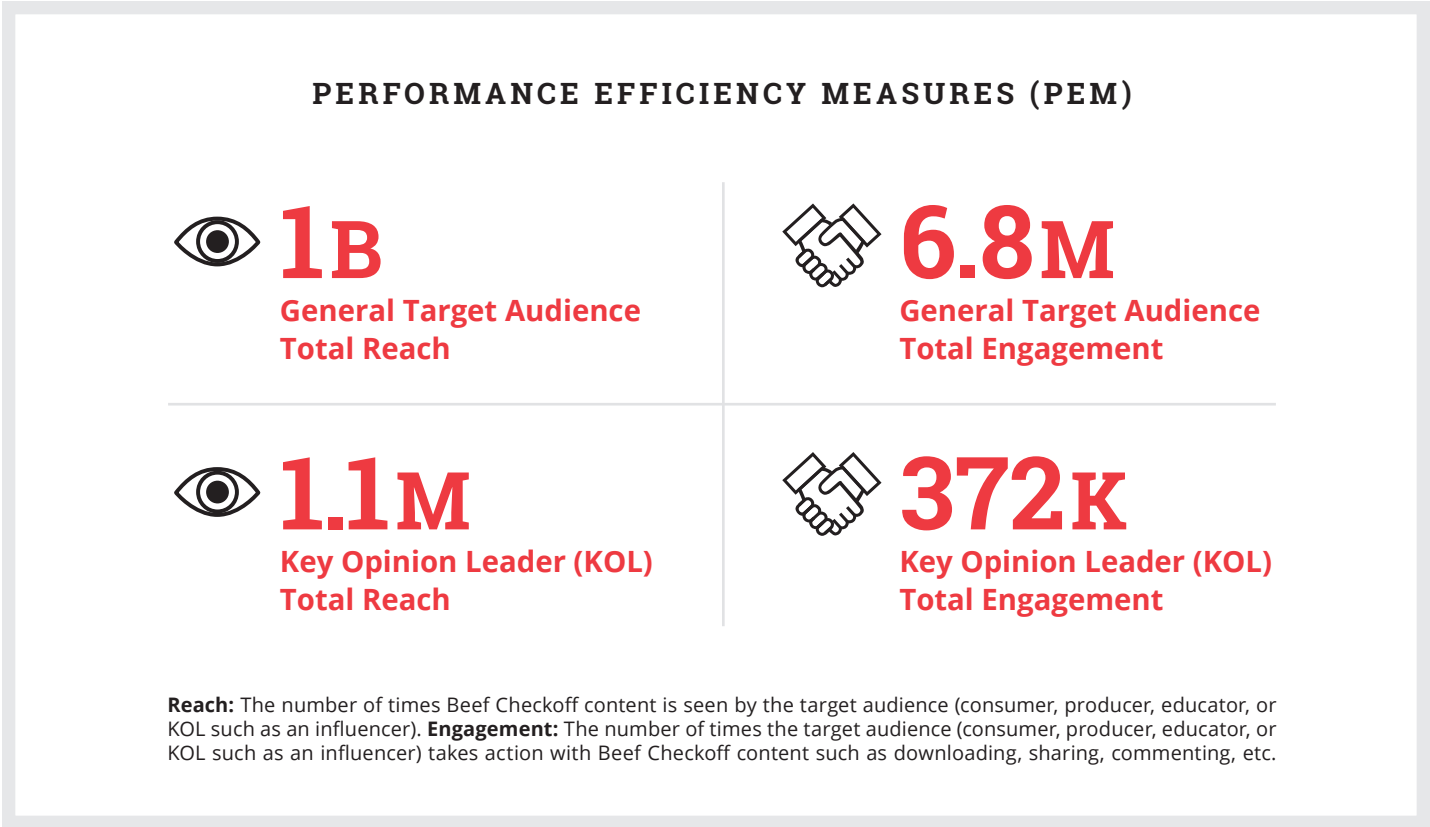
	PROMOTION <ul style="list-style-type: none">National Cattlemen's Beef Association (NCBA)North American Meat Institute (NAMI)/New York Beef Council (NYBC)
	RESEARCH <ul style="list-style-type: none">Foundation for Meat & Poultry Research & Education (FMPRE)National Cattlemen's Beef Association (NCBA)United States Cattlemen's Association (USCA)/Kansas State University (KSU)
	CONSUMER INFORMATION <ul style="list-style-type: none">American Farm Bureau Foundation for Agriculture (AFBFA)Meat Import Council of America (MICA)/Northeast Beef Promotion Initiative (NEBPI)National Cattlemen's Beef Association (NCBA)
	INDUSTRY INFORMATION <ul style="list-style-type: none">National Cattlemen's Beef Association (NCBA)National Institute for Animal Agriculture (NIAA)North American Meat Institute (NAMI)
	FOREIGN MARKETING <ul style="list-style-type: none">United States Meat Export Federation (USMEF)
	PRODUCER COMMUNICATIONS <ul style="list-style-type: none">Cattlemen's Beef Board (CBB)

FY23 BEEF CHECKOFF BUDGET SUMMARY

The following table is presented in order by AR number and summarizes the amount of Beef Checkoff funds spent within each program area as of November 30, 2023.

BEEF CHECKOFF BUDGET SUMMARY						
AR Number	Contractor/ Subcontractor	Program Area	Amount Awarded	Amount Spent as of 11/30/23	% FY23 Funding Spent	Project End Date
 PROMOTION PAGE 6						
2301-P	NAMI/NYBC	Veal Promotion	\$300,000	\$298,374	99%	9/30/23
2302-P	NCBA	Beef. It's What's For Dinner. Promotion	\$9,100,000	\$8,750,454	96%	9/30/23
 RESEARCH PAGE 10						
2310-R	FMPRE	Post-Harvest Safety Research	\$450,000	\$136,542	30%	9/30/25
2311-R	NCBA	Pre-Harvest Safety & Foundational Research	\$8,100,000	\$4,599,633	57%	9/30/25
2312-R	USCA/KSU	Meat Demand Monitor	\$450,000	\$5,044	1%	9/30/25
 CONSUMER INFORMATION PAGE 16						
2320-CI	MICA/NEBPI	Northeast Consumer/ Supply Chain Engagement	\$550,000	\$549,520	100%	9/30/23
2321-CI	AFBFA	Beef-Based Curriculum Resources & On The Farm STEM	\$900,000	\$828,447	92%	9/30/23
2322-CI	NCBA	Engagement With Thought Leaders, Supply Chain, and Media	\$6,020,000	\$5,667,508	94%	9/30/23
 INDUSTRY INFORMATION PAGE 22						
2330-II	NAMI	Veal Quality Assurance (VQA)	\$60,000	\$59,015	98%	9/30/23
2331-II	NIAA	Antibiotics Symposium & Beef Producer Engagement With the CDC	\$70,000	\$70,000	100%	9/30/23
2333-II	NCBA	Issues and Crisis Management and Planning, Beef Advocacy Training & Engagement (BATE), and Beef Quality Assurance (BQA)	\$2,500,000	\$2,282,327	91%	9/30/23
 FOREIGN MARKETING PAGE 28						
2340-FM	USMEF	International Market Development & Access	\$8,200,000	\$5,762,199	70%	9/30/23
 PRODUCER COMMUNICATIONS PAGE 30						
2350-PC	CBB	Producer Communications of Beef Checkoff Programs	\$1,850,000	\$1,825,036	99%	12/31/23

FY23 ARs BY THE NUMBERS



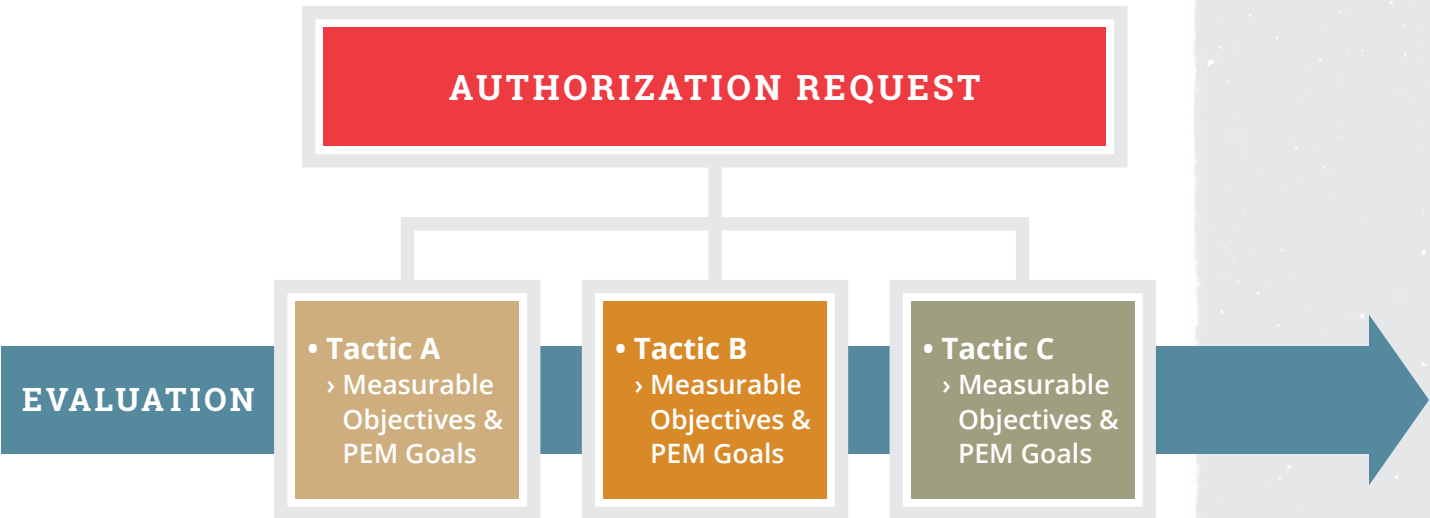
AR EVALUATION SUMMARY COMPONENTS

AR SUMMARY COMPONENTS

- Red AR Overview Bar**
 - › Provides the AR number and the contractor/subcontractor responsible for executing program work.
 - › Outlines the program's focus area(s) and amount of funding spent as of Nov. 30, 2023.
- Purpose Statement**
 - › Describes the AR's program area(s) and includes proposed activities, communication efforts, target audience(s), etc.
- Accomplishment & Result Highlights**
 - › Showcases significant program activities/events achieved during the fiscal year.
- Key Learnings**
 - › Identifies important takeaways that will influence and/or provide future efficiencies in contractors' program work.

AR EVALUATION COMPONENTS

- Progress Toward Measurable Objectives**
 - › ARs identify intended outcomes (Measurable Objectives) for each tactic. A Measurable Objectives chart on each summary page provides an overview of the intended outcomes achieved, exceeded, still in progress, or not achieved.
- Performance Efficiency Measures (PEM)**
 - › ARs identify PEM goals for each tactic. PEM graphs illustrate actual results compared to the program's original goals.



PURPOSE

This AR develops veal programming and consumer messaging focused on three areas: **Discovery** of, **Access** to, and **Confidence** in veal as a protein choice. Program priorities include connecting and communicating directly with consumers, revolutionizing veal marketing and merchandising resources, elevating veal's image, and engaging veal advocates.



An American Culinary Federation Webinar highlighted the use of veal to foodservice representatives and provided education on the industry's best management practices.

AR CONTAINS
**3 TACTICS &
9 MEASURABLE
OBJECTIVES**



¹ Measurable Objectives not achieved were just shy of their intended goals; however, program efforts successfully reached target audiences with Beef Checkoff content: a) Tactic A/MO #1: Goal – 5,000 confirmed beef sales; Actual – 4,957 confirmed beef sales; b) Tactic C/MO #1: Goal – Engage with five students through National Veal Collegiate Competition; Actual: Engaged with four students.

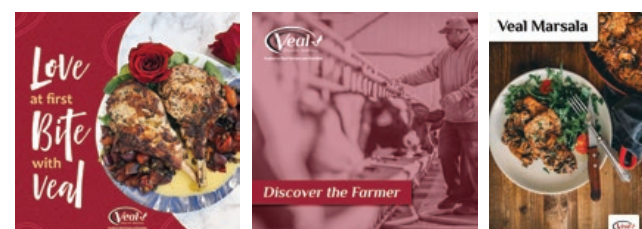
ACCOMPLISHMENT & RESULT HIGHLIGHTS

Homemade Cooking Classes: The *Homemade* virtual platform—which offers on-demand cooking classes with chefs who answer questions, provide culinary insights, and help their audience learn how to cook—reaches consumers across the United States. Over the course of six classes, over 6,300 consumers learned how to cook an array of veal dishes ranging from family friendly to more intricate recipes. Along with exposure to different veal cuts and flavor profiles, the classes also provided an opportunity to educate participants on veal production practices.

executive chefs, and chef instructors who expressed interest in cooking with veal, adding veal to restaurant menus, and utilizing cost-effective cuts. To date, the recording has been viewed 115 times, creating ongoing opportunities to provide veal menu options and education to ACF members.



Digital Marketing: This program's digital marketing plan delivers engaging content about veal meal solutions, nutrition information, and industry education to consumers in major domestic marketing areas. Content focuses on seasonal or themed recipe content (Valentine's Day, summer grilling, back-to-school, etc.) and easy-to-understand veal production content. Across the program's various social media platforms, *Veal – Discover Delicious* digital marketing messages had the cumulative opportunity to be viewed by over 2 billion consumers. Notably, digital content centered around how veal is raised, the veal life cycle, and veal production practices had higher engagement/click-through rates compared to the program's other campaigns.



PERFORMANCE EFFICIENCY MEASURES (PEM)²



Consumer Reach:

Goal: 1,231,000

Actual: 2,893,086



Consumer Engagement:

Goal: 37,740

Actual: 78,879



KOL³ Reach:

Goal: 86

Actual: 395



KOL³ Engagement:

Goal: 56

Actual: 146

² Consumer/KOL goals and actual results are aggregated across the AR's three tactics.

³ Influencers and Industry Stakeholders



KEY LEARNINGS

- Consumers' perception of the veal industry is an area where *Veal – Discover Delicious* has noticed a positive shift. In 2021, this program began digital communication efforts to educate consumers on how veal is raised, well-being standards, etc. This information has been well received and, overall, this program has seen a reduction in negative media reactions and reporting when it comes to veal. Further, having a positive perception of the veal industry increased among key opinion leaders (KOLs) such as influencers, chefs, and foodservice professionals after exposure to industry education

materials. To continue this positive shift, veal industry education content will continue to be at the forefront of this program's messaging efforts.

- Consumers are still unsure where to purchase veal, so future program efforts will entail partnerships with local, online, and in-store retailers. The goal is to create an easy avenue for consumers to purchase veal by collaborating with local and regional grocers. Specifically, efforts will target online shoppers by providing them with convenient and easy veal meal solutions.



PURPOSE

The *Beef. It's What's For Dinner.* advertising slogan and its campaigns promote the consumption of beef by highlighting key attributes such as its nutritional benefits, taste, and versatility. To execute promotion efforts, this AR develops consumer marketing strategies, creative content, and brand assets such as videos, ads, infographics, photography, web copy, website templates, banner ads, etc., to position beef as the top protein.



Assets like this photo from the *Beef. It's What's For Dinner.* Anthem Campaign illustrated moments in life that bring people together and are made better with beef.

AR CONTAINS
2 TACTICS &
10 MEASURABLE
OBJECTIVES



ACCOMPLISHMENT & RESULT HIGHLIGHTS

Beef. It's What's For Dinner. Anthem Campaign:

Using the slogan "Together We Bring More.", this campaign celebrates the moments in life that bring people together and are made better with beef. This three-year campaign has an established library of assets (video, audio, and digital) that allows for continuous advertising efforts to communicate beef demand drivers, moments in time, or both. Assets are also

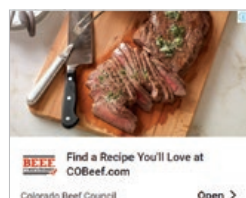
leveraged by Qualified State Beef Council partners to align messaging with local efforts, enhancing the impact and reach of this campaign. This past year, campaign assets were downloaded over 198,000 times for national and state use.



Qualified State Beef Council Advertising/Media

Partnership: To enhance national advertising efforts, this program supported 33 Qualified State Beef Councils with campaign planning, execution, ongoing optimization, and performance reporting to reach local consumers. For example, this program managed four

regional digital campaigns for the summer grilling season to complement the national marketing strategy. Collectively, state summer grilling campaigns drove an incremental 6 million *Beef. It's What's For Dinner.* video



views and 3 million audio/radio listens. On its own, the national campaign delivered nearly 22 million video views, 3.8 million audio ad listens, and 380,000 consumer clicks on BeefItsWhatsForDinner.com.



Social Media Strategy: To continue to build upon strategies that increase consumer reach and engagement, this program's social media video content took advantage of moments in time and online trends such as St. Patrick's Day, Pi Day, waffle iron burgers, smash burgers, etc. In total, these videos resulted in over 29,000 engagements and reached over 2.3 million people. Efforts also included hosting an Instagram live cook-along event to tap into an influencer's expansive fan base (1.88 million – consumer reach / 55,000 – consumer engagement), and a Holiday Sweepstakes promotion that received over 4,700 engagements in the month of December via consumer comments.



PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Consumer Reach:

Goal: 772,556,544

Actual: 917,782,465



Consumer Engagement:

Goal: 3,124,044

Actual: 3,601,304



KOL² Reach:

Goal: 1,500

Actual: 2,205



KOL² Engagement:

Goal: 3,000

Actual: 200,696

¹ Consumer/KOL goals and actual results are aggregated across the AR's two tactics.

² State Partners/Agencies, Retailers, Brand Partners, Influencers, Educators, and Producers



KEY LEARNINGS

• Important takeaways from the *Beef. It's What's For Dinner.* Anthem Campaign that will be applied in FY24 include:

- Consumers enjoy ads that are relatable, easy to follow, and include a variety of scenarios that reflect consumers across all demographic segments.
- To ensure consumers are continually making a connection with the *Beef. It's What's For Dinner.* brand and beef industry, showcase beef at the beginning and end of ads.

• Throughout FY23, the social media team experimented with different types of video content to explore how various themes can impact consumer reach and engagement. Videos with the greatest engagement rates involved rancher stories, sustainability messaging, national moments, and recipe trend content. These insights will be carried into FY24 social media planning efforts to ensure content capitalizes on areas/information that interests consumers.

PURPOSE

This is a multi-year AR that focuses on post-harvest beef safety, which is a program that identifies and improves science-based interventions and process controls to ensure the safety of beef.



Beef Checkoff-funded safety research was shared with attendees at the Consumer Food Safety Education Conference.

AR CONTAINS 1 TACTIC & 3 MEASURABLE OBJECTIVES



¹ Performance Efficiency Measures are not required for Research ARs.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Showcasing Research Supported by the Beef Checkoff: The Meat Industry Food Safety Conference continues to provide a forum for highlighting research results that add to the evidence base and advance the knowledge base of food safety practitioners. Over the course of the conference, three Beef Checkoff-funded research projects, which focused on risk assessments of *Salmonella* in ground beef products, were presented. These projects were the result of a joint request for proposals with the National Cattlemen's Beef Association to address *Salmonella* data gaps across the beef industry.

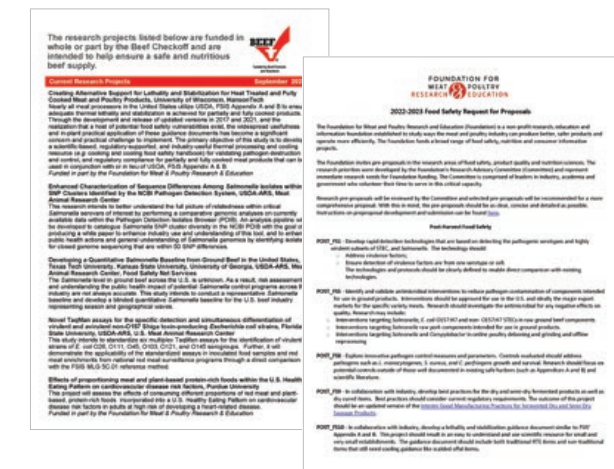
Demonstrating Producers' Commitment to Beef Safety: This year marked the 30th anniversary of an *E. Coli* O157:H7 outbreak that drew public and media attention to beef safety. This was a pivotal moment in the industry, and it remains critical to demonstrate the continued commitment of producers to support beef safety research. To extend the awareness of producer contributions to safe beef, post-harvest



safety research was shared with attendees at the Consumer Food Safety Education Conference. The presentation brought Beef Checkoff research awareness and knowledge to an audience of 200 food safety educators and communicators, public and environmental health professionals, extension specialists, registered dietitians, and others.

Addressing Knowledge Gaps Through Research: The intent of this AR is to address knowledge gaps, and each investment in research is a step toward further improving the safety profile of beef products. Specific to *Salmonella*, two research projects will enable the industry to better

understand the relationship between *Salmonella* serovars as well as provide quantitative and prevalence data. These findings will inform a roadmap of next steps to further ensure safe beef products are available to the world.



KEY LEARNINGS

- Timely research priorities and outreach are essential to this AR's success. As beef safety has been enhanced over the years, it is becoming increasingly necessary to refine priorities to the areas with the greatest potential for impact.
- While timely research priorities are important, taking the time to design and implement specific projects (e.g., the *Salmonella* baseline study) is

- essential to ensuring a robust study with direct, relevant findings.
- Innovation is key to maintaining and improving the safety of the beef supply. It is critical to understand how emerging technologies (e.g., genome sequencing and antimicrobial treatments) can be applied to further enhance the safety of the beef supply.

PURPOSE

This AR's research priorities focus on pre-harvest beef safety, human nutrition, product quality and culinary expertise, sustainability, and market research. To position beef as the number-one protein, research findings are disseminated to key stakeholders to provide insights that support several Beef Checkoff program efforts to ensure materials and campaigns are supported by sound data.



To address research needs, scientists from multiple disciplines shared novel research approaches and insights at the Beef Science Summit.

AR CONTAINS
5 TACTICS &
16 MEASURABLE
OBJECTIVES



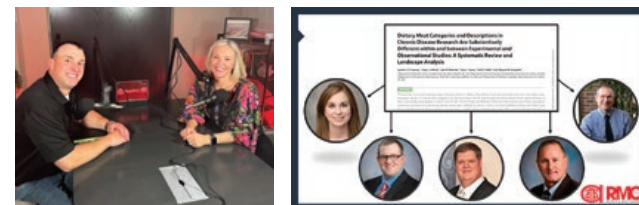
¹ Performance Efficiency Measures are not required for Research ARs.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Showcasing the Nutrition Research Program at the American Society for Nutrition (ASN) Conference:

The ASN hosts the preeminent nutrition research conference, which gathers scientists from around the globe to share and discuss new scientific findings and current nutrition topics. Along with fostering key relationships, Beef Checkoff-funded research was highlighted through 14 poster presentations and two oral poster presentations at the 2023 ASN Conference. Program staff also helped facilitate two key "hot topic" sessions among top-tier scientists to discuss research opportunities regarding the whole food beef matrix and the challenges associated with nutrient deficiencies in the adolescent years of growth.

conference. Along with submitting 28 Beef Checkoff-funded research abstracts, program staff served as speakers, panelists, moderators, and session chairs during the meeting. Additionally, numerous researchers across the technical areas were elevated to give key research insights across multiple RMC sessions. The conference also allowed for 1:1 engagement with thought leaders to discuss emerging topics, gain scientific understanding, and industry insights.



Beef Science Summit: This AR hosted the Beef Science Summit to inspire collaboration and integration among key technical experts to address some of the industry's most pertinent research needs. By convening 31 scientists with various backgrounds—beef safety, product quality, sustainability, and human nutrition—from 17 universities, private research entities, and USDA's Agricultural Research Service, the summit cultivated a multi-disciplinary discussion about Beef Checkoff research goals and priorities, while also providing a perspective on key beef research insights. Attendees

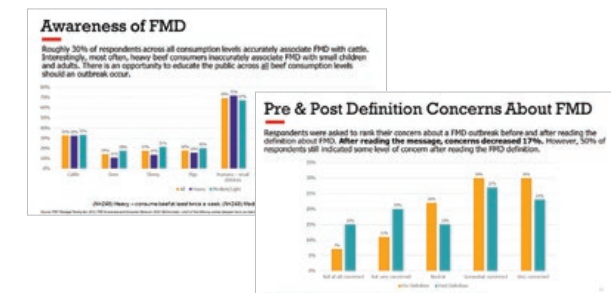
were able to engage with other scientists to increase novel research approaches across disciplines and continuously drive beef demand with sound science.



Foot-and-Mouth Disease (FMD) Awareness & Consumer Behavior Assessment:

FMD is a severe and highly contagious viral disease with the potential to negatively impact the entire U.S. beef industry. Therefore, it is important for the industry to have a communication plan that provides consumers with information that is factual, easy to understand, and genuine. To learn more about consumers' reactions to various messages and content that would be used in a media response or as part of a website as well as general insights into consumers' perceptions and misconceptions of information related to FMD,

a study was conducted. Data from this research will be valuable in guiding how other Beef Checkoff programs develop FMD messages/content to effectively communicate with consumers.



KEY LEARNINGS

- In 2023, an increased focus was placed on leveraging Beef Checkoff research with non-traditional audiences. This effort resulted in a higher-than-average number of peer-reviewed publications, a greater number of research abstracts accepted at scientific conferences, and broader acknowledgment of Beef Checkoff-funded research across numerous audiences. There were also more placements of research content on associated Beef Checkoff sites (i.e., BQA.org and BeefItsWhatsForDinner.com) as well as with outside media, industry, and stakeholder outlets such as consumer press publications.
- After the Beef Industry Safety Summit, attendees were surveyed and over 93% stated that this

meeting is essential to their business or research area and needs to be held in person, annually. This data has informed FY24 planning efforts to hold this critical event in person.

- Consumers' interest in nutrition is increasing, resulting in the elevation of nutrition emphasis in the beef demand drivers. This was demonstrated through the 2022-2023 Consumer Beef Tracker, when consumers noted that primary components of demand drivers were "food that gives me strength" and "is a healthy choice." Based on this data, beef nutrition information will continue to be incorporated into consumer communication and marketing content through *Beef. It's What's For Dinner.* and influencer programming.



Scientific Research and Thought Leadership Featured at the American Meat Science Association Reciprocal Meat Conference (RMC): The scientific leadership of this AR's technical research programs (pre-harvest safety, product quality, nutrition, and sustainability) had a strong presence at this premier meat science

AR# 2312-R

Contractor:
United States Cattlemen's Association
Subcontractor:
Kansas State University

Program Area:
Meat Demand Monitor

**Amount
Awarded:**
\$450,000

**Total Spent
as of 11/30/23:**
\$5,044

PURPOSE

The Meat Demand Monitor (MDM) AR conducts a monthly survey that tracks consumer preferences, views, and demand for meat and plant-based proteins with a separate analysis for retail and foodservice channels. The information collected from this survey can be used by the beef industry as well as leaders within the Beef Checkoff to guide sound industry decision-making.



The U.S. Farm Report visited Kansas State University during its College Roadshow series, which featured MDM information.

AR CONTAINS
1 TACTIC &
3 MEASURABLE
OBJECTIVES



¹ Performance Efficiency Measures are not required for Research ARs.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Ongoing MDM Data Collection & Execution: Since the launch of the MDM in February 2020, the program has successfully continued its ongoing data collection, analysis, and dissemination. Each month, over 2,000 U.S. residents are surveyed on a host of domestic meat consumption, demand, and preference items. From these surveys, the MDM issues a monthly report on consumer purchasing behaviors, which is shared on social media platforms and is made publicly available on the AgManager.info website. Efforts to broadly disseminate monthly MDM findings has resulted in greater awareness and utilization of this data by industry stakeholders.

Additionally, monthly survey data can be analyzed at the state-level through the MDM's interactive dashboard/map. In the figure below, the states shaded in dark purple indicate regions of the U.S. that place higher relative importance on price compared to coastal states/cities. While price is important in all states, the dashboard/map visually shows it is not equally important across all states. Monthly survey data will continue to be incorporated into this interactive tool to enable users to gain more state-specific insights on consumer behavior and factors that are of greatest importance to them when purchasing protein (i.e., nutrition, origin/traceability, price, safety, and taste).

Ongoing MDM Media Partnerships: The MDM is regularly shared on the American Ag Network, which is a radio, digital, and multimedia agriculture news platform. Specifically, MDM updates are broadcast on the network's nationally syndicated talk show, *Agriculture of America*. Broadening the survey's reach, *Agriculture of America* estimates its broadcast has the potential to reach 1.09 million listeners per month. Actual listeners are quantified by the show's podcast downloads, which are about 5,500 per month. These analytics illustrate the value of this partnership and its ability to increase the number of people MDM data is shared with.

Ongoing MDM Dissemination at Key Industry Events: It is integral to share data at key industry events, as it enhances the awareness of the MDM among professionals from the meat science community and allied disciplines. At the 2023 American Meat Science Association Reciprocal Meat Conference (RMC), MDM findings were presented to attendees whose meat interests/background spanned across a wide range of sectors to include commercial, academic, government, and consumer. In addition, MDM updates and resources were also shared at various educational meetings in the meat-livestock industry. Not only does presenting MDM information at these events enhance knowledge of the survey itself, but it provides participants with a more in-depth understanding of domestic meat demand, consumption, and preferences.



KEY LEARNINGS

- As more professionals are made aware of the MDM, there has been substantial interest from economists and those in other disciplines in the monthly information it provides. So that survey data can be used for its intended purpose, to guide industry decision-making, this program will continue its efforts to broadly distribute and share MDM resources.

- As the MDM heads into its fifth year of data collection, it is well-poised to continue surveying U.S. residents, provide timely monthly summary reports, and execute multiple dissemination strategies across various media platforms and industry conferences/events. In addition to these ongoing efforts, the MDM will continue to build out its interactive dashboard to provide stakeholders with more in-depth, state-specific meat demand, consumption, and preference information.

KANSAS STATE

Department of
Agricultural Economics

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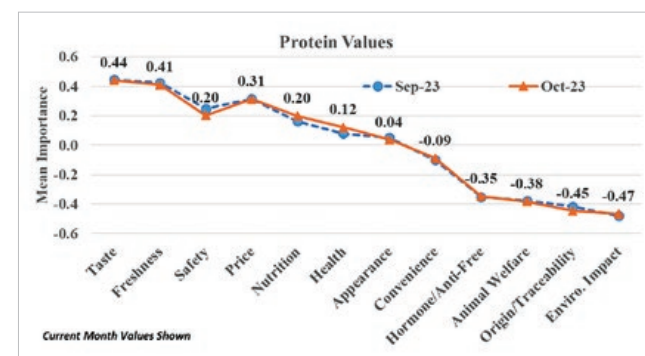
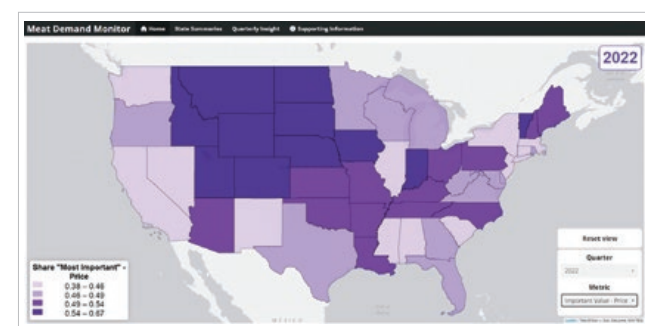
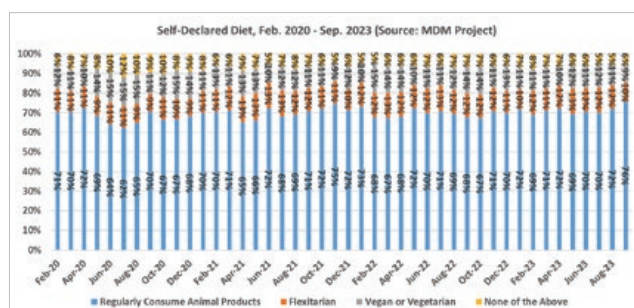
MDM: Meat Demand Monitor

The MDM tracks U.S. consumer preferences, views, and demand for meat with separate analysis for retail and food service channels. MDM is a monthly online survey with a sample of over 2,000 respondents reflecting the national population.

Willingness to Pay & Projected Market Share

RETAIL	Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
Aug-23 WTP (\$/lb)	\$17.94	\$8.74	\$7.05	\$5.72	\$8.34	\$8.33	\$9.37	\$3.06	
Market Share	9%	24%	13%	8%	25%	3%	5%	7%	7%
Sep-23 WTP (\$/lb)	\$17.29	\$8.88	\$7.38	\$6.02	\$8.60	\$8.23	\$9.17	\$3.13	
Market Share	7%	25%	14%	8%	26%	2%	4%	7%	7%

FOOD SERVICE	Ribeye Steak	Beef Hamburger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Aug-23 WTP (\$/meal)	\$27.48	\$21.29	\$16.39	\$19.24	\$18.01	\$12.37	\$18.64	\$18.60	
Market Share	15%	26%	5%	11%	13%	4%	13%	7%	6%
Sep-23 WTP (\$/meal)	\$26.62	\$19.49	\$14.54	\$17.53	\$17.21	\$12.19	\$17.04	\$18.24	
Market Share	16%	25%	4%	9%	14%	4%	12%	8%	7%



Contractor:
Meat Import Council of America
Subcontractor:
Northeast Beef Promotion Initiative

Program Area:
Northeast Consumer/
Supply Chain Engagement

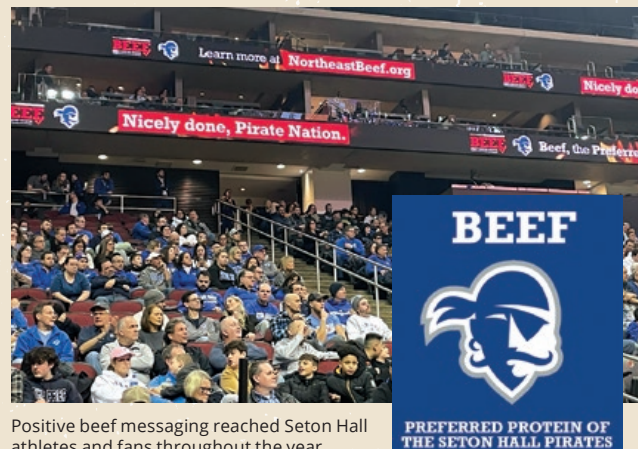
**Amount
Awarded:**
\$550,000

**Total Spent
as of 11/30/23:**
\$549,520



PURPOSE

The Northeast region is home to nearly 72 million consumers, and it encompasses four of the nation's top 10 metropolitan cities: New York City, Boston, Philadelphia, and Washington D.C. Through this AR, national Beef Checkoff messaging and content is extended to this region by bridging knowledge and resource gaps with consumers, nutrition influences, and members of the supply chain.



Positive beef messaging reached Seton Hall athletes and fans throughout the year.

AR CONTAINS
2 TACTICS &
8 MEASURABLE
OBJECTIVES



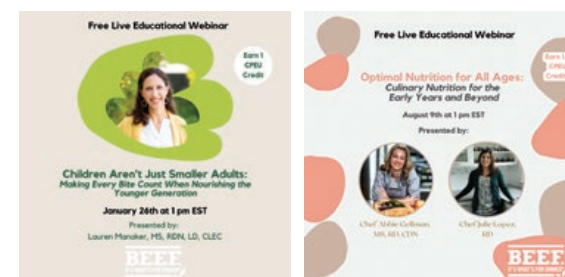
ACCOMPLISHMENT & RESULT HIGHLIGHTS

Healthcare Professional Webinar Series: This new, three-part webinar series leveraged the expertise and influence of well-known Registered Dietitian Nutritionists (RDNs) to deliver content on Beef in the Early Years and throughout life's stages, sustainability, and beef's role in a healthy diet. The series enabled this program to engage with over 900 healthcare professionals in the clinical, foodservice, academia, retail, research, and private practice fields. Post-webinar survey data captured that 90% of participants are *very likely* or *likely* to recommend beef to their clients/patients based on the research, guidance, and practical application tips that were shared. Further, this series was instrumental in establishing new and meaningful relationships with healthcare professionals in the Northeast region.

opportunities to share positive beef messages with Seton Hall students through the Beef Checkoff-funded smash burger station in the Pirate Dining Room.



Stop & Shop Retail Engagement: To reach consumers where they are purchasing food for their families, this program partnered with Stop & Shop on a summer campaign that promoted beef's nutritional benefits. During the eight-week campaign, nutritional messaging was placed in the retailer's meat case and magazine ads, and was also broadcast via in-store advertisements. With more than 400 Stop & Shop locations through New York, New England, and New Jersey, this campaign reached over 160,000 consumers and increased the sale of lean ground beef by 12,000 pounds/units compared to the same period the previous year. In addition, the partnership included a food truck beef sampling event at the Falmouth, MA, Stop & Shop to tie together the Beef Checkoff's support of the 2023 ASICS Falmouth Road Race. Both Stop & Shop activations highlighted the positive impact of this partnership on beef demand as well as the enhanced collaboration with the retailer's influential registered dietitian team and marketing department.



Seton Hall Athletics Partnership: Beef was recognized as the preferred protein of the Seton Hall Pirates during the 2022-2023 athletic season. Positive beef messaging was distributed at men's basketball events to include live broadcast mentions at home and away games, the gameday program, LED arena ribbons, and fan-favorite shuffle games featured on the main videoboard. Beef Checkoff content also reached over 65,000 fans through the enter-to-win Beef Up Your Homegate social campaign, where participants had a chance to win a grill and grilling utensils. This year's partnership also included

PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Consumer Reach:

Goal: 6,400,000

Actual: 15,361,596



Consumer Engagement:

Goal: 124,640

Actual: 120,602



KOL² Reach:

Goal: 9,735

Actual: 42,156



KOL² Engagement:

Goal: 3,603

Actual: 6,090

¹ Consumer/KOL goals and actual results are aggregated across the AR's two tactics.

² Producer Advocates, Experts with Influence, and Social Influencers



KEY LEARNINGS

- To further extend the awareness of the Healthcare Professionals webinar series, a variety of paid and in-kind approaches were leveraged. Paid advertisements through the regional Academy of Nutrition Dietetics and dietetic practice groups, as well as in-kind promotion through Qualified State Beef Council-registered dietitians and nutrition consultants, broadened the reach of this series. Such approaches will continue to be used to enhance the exposure of program events.
- Shifting to activities that have year-round engagement opportunities (e.g., athletic partnerships) versus a single event provides more touch points with consumers and makes more

- effective use of staff time and financial resources. To capitalize on this approach, this program will look to expand its relationship with Seton Hall and other athletic programs in FY24.
- A new and unique partnership with the American Dairy Association North East resulted in a successful retail dietitian beef and dairy farm tour experience with RDNs from five major grocery stores. This partnership was a resourceful way to cost-share program expenses and enhance RDN engagement objectives for both parties. To achieve mutually and meaningful outreach goals, these types of partnerships will continue to be explored.

PURPOSE

This AR targets educators in the nation's largest school districts with its beef-centric professional development events, lesson activities, and online learning tools. Utilizing these resources that meet core science, technology, engineering, and math (STEM) requirements, urban educators become equipped to teach their students about STEM concepts through the lens of beef production. These learnings result in higher levels of critical thinking and further students' understanding of the importance of the beef industry to society.



During On The Farm STEM, educators learned how to teach and implement beef-focused Next Generation Science Standards and phenomena.

AR CONTAINS
1 TACTIC &
3 MEASURABLE
OBJECTIVES



ACCOMPLISHMENT & RESULT HIGHLIGHTS

On The Farm STEM Beef Immersive Experience:

This year's On The Farm STEM hosted 30 elementary, middle, and high school science teachers, administrators, and curriculum directors who represented metropolitan communities with a cumulative school district enrollment of over 1.6 million students. Attendees received 60 hours of face-to-face engagement with the program's facilitators, cattle producers, and industry experts to learn how to apply beef production concepts such as environmental stewardship, breed genetics, and technology utilization into their classroom materials. This national event helped teachers and curriculum directors understand the relevancy of beef production to society and science education and addressed common misconceptions about production, animal welfare, sustainability, and more.

on scientific, beef-based concepts. This webinar series promoted and supported teachers' efforts to include Beef Checkoff-funded education materials in their classrooms, and helped teachers and students understand challenging concepts in the beef industry that may have otherwise never been discussed or experienced in the classroom.

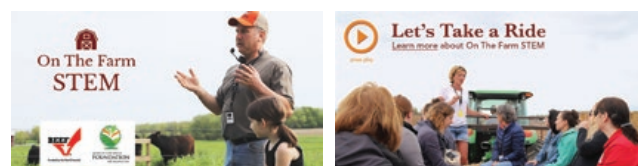


Local On The Farm STEM Events With Qualified State Beef Councils: Due to this program's growing popularity, this AR began training Qualified State Beef Councils interested in hosting local On The Farm STEM events. Throughout the fiscal year, Colorado Beef Council, New York Beef Council, and Washington State Beef Commission staff learned how to facilitate connections between science and beef production to ensure state-level efforts uphold the quality and consistency standards of the national model. Over 700 hours of staff time was invested to empower Qualified State Beef Council staff, in partnership with state agricultural literacy groups and On The Farm STEM alumni, to successfully host immersive, beef-focused STEM events in their states.



Science Through the Lens of Agriculture Webinar Series:

This webinar series featured industry experts who provided context on how to apply scientific principles and information to STEM career pathways in the beef industry (e.g., geneticists, rangeland scientists, food safety inspectors, microbiologists, embryologists, veterinarians, etc.). Each webinar averaged over 1,300 registrants representing individuals from all 50 states. Webinar participants cumulatively received approximately 126,144 hours of education



PERFORMANCE EFFICIENCY MEASURES (PEM)



Educator Reach:

Goal: 3,076,890

Actual: 3,315,297



Educator Engagement:

Goal: 486,630

Actual: 504,752



KOL¹ Reach:

Goal: 141,010

Actual: 151,251



KOL¹ Engagement:

Goal: 28,860

Actual: 30,679

¹ Educator Coordinators/Leads



KEY LEARNINGS

- Educational materials that meet state guidelines, specifically Next Generation Science Standards (NGSS), and support science educators in the instructional shifts that these standards require are essential. On The Farm STEM is designed to equip educators with free lessons, activities, online learning tools, and professional development events that they can return to their population-dense school districts to introduce students to beef production. This program will continue to build upon its suite of NGSS-approved resources to aid science teachers in supporting their students and goals.
- With the input of Qualified State Beef Councils, local On The Farm STEM programs have undergone iterations and improvements such as the creation of an implementation guide and e-learning modules that outline the program's requirements and needed steps for states to become affiliated partners. These findings have improved local implementation as well as support that is more attuned to the specific needs of each state. As more states are onboarded and become affiliated, On The Farm STEM will work to be fluid, as each state has unique agricultural assets to bring to the program as well as areas of need.

PURPOSE

The tactics in this AR contribute expertise to other Beef Checkoff programs, state partners, and global industry influencers/stakeholders to position beef as the top protein choice for consumers. This program also builds relationships with third-party beef advocates, drives positive mentions of beef in the media, and works with supply chain stakeholders to communicate innovations and the value proposition of beef.



The Voices of the Outdoors video series features commonalities between ranchers and outdoor enthusiasts.

AR CONTAINS
4 TACTICS &
16 MEASURABLE
OBJECTIVES



ACCOMPLISHMENT & RESULT HIGHLIGHTS

Creating Moments for Beef to Thrive: To create and foster beef-centric moments, this program placed beef content in front of consumer audiences throughout the calendar year. Moments such as National Cheesesteak Day, Beef Burger Day, National Lasagna Day, and National Sandwich Month provided short-term rally points where



beef content thrived during quieter, non-holiday times. Specifically, 12 new recipes and promotional pieces were created that reached more than 7.3 million consumers and engaged over 464,000 of them.

Positive Beef Messaging Media Placements:

In FY23, more than 14,000 beef-related press releases, stories, quotes, and industry data were placed in local and national outlets across the country. This achievement was accomplished by focusing media pitches on key moments in time and trending topics. For example, a St. Patrick's Day recipe pitch to Fox News was shared and then picked up a total of 20 times by other media outlets, including Yahoo News and Trend Fool. In addition, the launch of the Voices of the Outdoors video series, which showcases the common



ground between outdoor enthusiasts and farmers and ranchers, has enabled this program to reach an even larger and more varied audience. Each outdoor enthusiast was chosen for their extensive consumer following. To date, the series has reached more than 1.1 million people via social media channels, YouTube, and media placements.

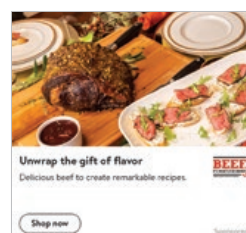
Nutrition Influencer Meat-Up: The goal of this event was to build key relationships with registered dietitian influencers and provide them with education on beef nutrition and to build their awareness of beef nutrition research, culinary applications, and sustainability practices. Throughout the three-day "Meat-Up" event, 15 influencers shared their beef industry learnings and knowledge with their respective social media audiences, resulting in a potential, combined reach of 1.2 million consumers across each of their platforms. The relationships built also led to content collaboration throughout the remainder of FY23.



Notably, for the February Heart Health Campaign, this group reached over 62,000 consumers and engaged over 16,000 of them by sharing positive beef messaging with their followers.

Retail & Foodservice E-Commerce Partnerships:

To reach consumers where they are shopping, partnerships with leading national companies worked to promote the overall beef category via online sales at retail and foodservice. Retail e-commerce activities through July resulted in over \$22 million dollars in incremental sales (beef purchases made by consumers who saw beef ads), delivering a strong return on ad spend of \$53 dollars of beef sold for every \$1 invested. The week-long foodservice e-commerce campaign resulted in a 200% increase in burger orders the week of promotion and a 10% increase in the establishment's beef sales.



PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Consumer Reach:

Goal: 35,035,500

Actual: 45,171,324



Consumer Engagement:

Goal: 470,000

Actual: 2,273,014



KOL² Reach:

Goal: 295,400

Actual: 772,973



KOL² Engagement:

Goal: 97,800

Actual: 108,596

¹ Consumer/KOL goals and actual results are aggregated across the AR's four tactics.

² Chef, Food, and Ag Influencers/Nutrition Influencers/Media/Supply Chain Partners



KEY LEARNINGS

- Different content for the different media platforms is critical to success. For example, recipe content does not perform as well on TikTok, as consumers are less likely to click outside of the platform or save and return to a post. In FY24, education and tips on TikTok-preferred content will be implemented to ensure consumers are receiving key beef information without having to revisit a particular post.
- Nutrition and health experts value scientific research related to beef and expect engagements to be based on science. Further, this group

- values experiences where they can ask technical questions about beef to experts in the field.
- E-commerce continues to be a significant buying channel for consumers that delivers a strong return on investment for the Beef Checkoff. E-commerce campaigns have been successful at selling beef during traditional seasons (e.g., holidays and summer grilling), so this program looks to build on these successes and apply learnings to promote and sell beef during non-traditional beef timeframes.

PURPOSE

The Veal Quality Assurance (VQA) program provides producer education and certification to ensure veal calves receive quality care through every stage of life and are raised using ethical practices that result in a safe, wholesome, quality product that meets or exceeds regulatory and consumer expectations.



The annual Veal Summit provides program updates to industry leaders and solicits their input on program needs.

AR CONTAINS
1 TACTIC &
4 MEASURABLE
OBJECTIVES

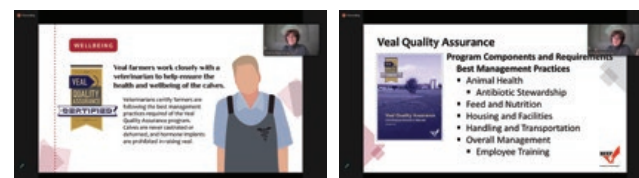


ACCOMPLISHMENT & RESULT HIGHLIGHTS

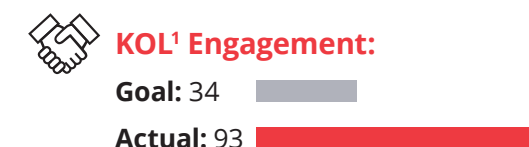
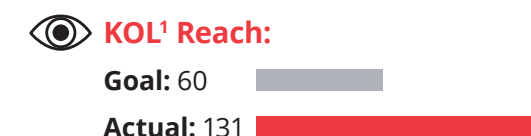
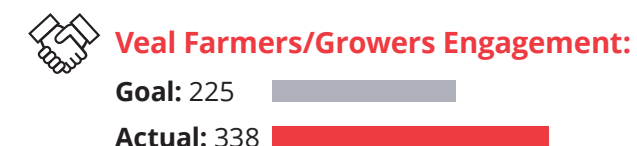
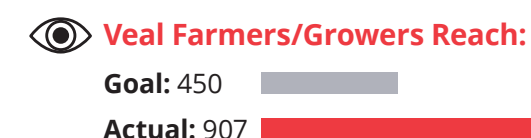
VQA Technical Advisory Group: This year's AR focused on a technical review of the VQA manual and the program's certification requirements. Nine technical experts consisting of veterinarians, nutritionists, animal scientists, and veal industry representatives served as the Technical Advisory Group and collectively provided program recommendations and updates. Notably, a significant update to the current manual pertains to animal welfare standards and the change from the Five Freedoms concept to the Five Domains science model.

Using nutrition as an example, the assumption in the Five Freedoms concept is that absence of (or freedom from) hunger and thirst ensures high welfare standards. In contrast, the Five Domains model focuses on maximizing positive nutrition factors (e.g., access to sufficient clean water/food that is varied and balanced to meet dietary needs) to ensure the highest state of welfare throughout an animal's life. This shift reflects the advancement of animal welfare science and the significance of promoting positive opportunities versus emphasizing negative experiences.

Engagement With KOLs: Various aspects of veal animal care and on-farm practices were shared with KOLs to engage them in the industry's ongoing commitment to producing safe, nutritious, humanely raised veal products. At the annual Veal Summit, VQA program updates were shared with 48 attending veal farmers, veterinarians, feed companies, veal companies, packer/processors, and Qualified State Beef Councils. This group of leaders was surveyed, and on a scale of one to 10, with 10 being extremely important, VQA was ranked eight regarding its importance to the veal industry. Veal Summit attendees also provided input on future program planning efforts for FY24.



PERFORMANCE EFFICIENCY MEASURES (PEM)



¹ Industry Stakeholders



KEY LEARNINGS

- A noticeable change from the previous manual to the new content is the emphasis on outcome-based measures for certification representing the shift from the Five Freedoms concept to the Five Domains animal welfare model.
- The lack of (or need for) research related to veal facilities was a knowledge gap identified by the Technical Advisory Group. Limited research has

been done to evaluate the influence of space allowance on calf welfare in modern veal calf production systems. There is also growing interest regarding the timing and management of moving calves from individual pens to pens of two or more calves. While some studies exist, more research is needed to better understand the relationship between pen space allowance and calf health.



To enhance veal knowledge among decision-makers in the hotel, restaurant, and institution sectors, this AR partnered with Veal Promotion to provide American Culinary Federation members with a continuing education opportunity. Participating members received information on veal nutrition and recipe ideas and learned how veal calves are raised using VQA production standards that result in safe, wholesome, high-quality products that meet regulatory and customer expectations.

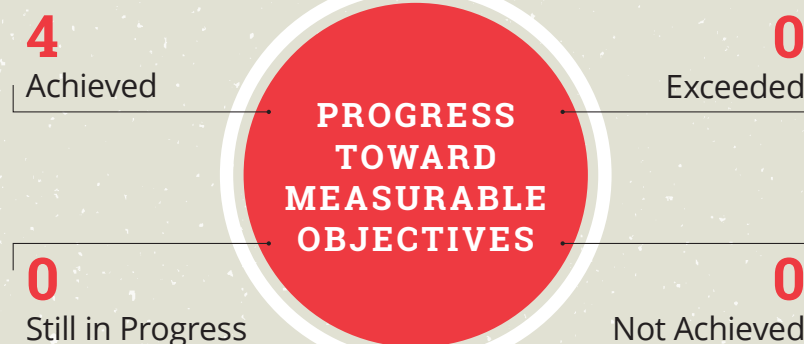
PURPOSE

Antibiotic stewardship continues to be a top priority for the beef industry, and this AR enhances the dialogue of science-based information between animal, human, and environmental health leaders. The knowledge and insights shared increase attendees' awareness of antimicrobial use in animal and human health as well as in sustainable food production. Further, program content arms beef producers with factual talking points that enable them to effectively engage with influencers, consumers, and leaders who have the potential to impact decisions regarding antibiotic use.



Antibiotics Symposium panel discussions explore the work being done to combat antimicrobial resistance from both the human and animal health perspectives.

AR CONTAINS
**2 TACTICS &
4 MEASURABLE
OBJECTIVES**



ACCOMPLISHMENT & RESULT HIGHLIGHTS

Antibiotics Symposium: The theme for this year's 12th symposium was *Exploring Stewardship, Sustainability, & Collaboration*. Its interdisciplinary approach brought together attendees representing producers, producer organizations and cooperatives, veterinarians, academia, state and federal government, animal health manufacturers/retailers, trade organizations, agricultural marketing, food retailers, and nonprofit organizations. This agriculture-led forum fosters shared learnings and insights about responsible antibiotic use and the primary efforts aimed at combating antimicrobial resistance. Further, the symposium

continues to build vital relationships and synergies among the various groups by recognizing that the health of people is connected to the health of animals and the environment.



Antibiotics Symposium White Papers: Symposium white papers provide an overview of session topics and speakers, but a different summary is revealed when reports are viewed in succession. Notably, the white papers reflect the event's growth and continued ability to connect leaders across the human and animal health sectors. The series also documents

the evolution of conversations between animal agriculture and federal agencies as summaries outline the progression of interdisciplinary collaborations to holistically address antibiotic stewardship, resistance, communications, education, and research.



Centers for Disease Control and Prevention (CDC) Engagement With Farmers, Ranchers, and Veterinarians: To truly have a One Health (the CDC's collaborative, multisectoral, and transdisciplinary approach) conversation about antimicrobial resistance and stewardship, strong relationships between human, animal, and environmental leaders must be formed. This engagement opportunity is an integral investment for the Beef Checkoff, as it fosters relationships with the CDC and other federal agency leaders who affect the social license of farmers, ranchers, and veterinarians in the antimicrobial use, stewardship, and resistance spaces. It is evident that trust between all parties is growing, and continued collaborations and understanding of each population's role in antimicrobial stewardship and resistance will ensure that constructive and meaningful advancements are made.



PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Producer Reach:

Goal: 67,000

Actual: 122,750



Producer Engagement:

Goal: 2,075

Actual: 3,210



KOL² Reach:

Goal: 1,425

Actual: 3,325



KOL² Engagement:

Goal: 275

Actual: 585

¹ Producer/KOL goals and actual results are aggregated across the AR's two tactics.
² CDC, USDA, and FDA Scientists/Leaders & Processor, Retail, and Restaurant Leaders



KEY LEARNINGS

- The antimicrobial stewardship and resistance conversation continues to have a robust presence within the public health communities. It is important for animal agriculture to have the opportunity to engage in these conversations, so this program will continue to address antimicrobial issues and concerns by assembling a high-quality gathering of interdisciplinary leaders.

- This program will focus efforts to enhance its engagement with members and stakeholders to ensure key insights from over a decade of symposia continue to be used in the decision-making process for antimicrobial stewardship and resistance work in research, education, and communications.

PURPOSE

This AR covers three distinct program areas:

- **Issues and Crisis Management and Planning:** This tactic provides resources such as crisis plans, talking points, media outreach, response statements, fact sheets, infographics, videos, and other digital content that can be deployed when issues or crises arise.
- **Beef Advocacy Training and Engagement (BATE):** This tactic provides training to develop credible advocates and spokespeople within the beef community, equipping them with information and resources to readily engage in conversations and address consumer concerns.

- **Beef Quality Assurance (BQA):** This tactic delivers educational programs to producers and focuses on issues that impact consumer trust and beef demand, ranging from well-being to BQA certification.



Spokespeople from the Trailblazers program were immersed in a variety of production settings during the new Trailblazers Advocacy Summit.

AR CONTAINS
**3 TACTICS &
11 MEASURABLE
OBJECTIVES**



ACCOMPLISHMENT & RESULT HIGHLIGHTS

Issues and Crisis Management and Planning

- **Foot-and-Mouth Disease (FMD) Preparedness:** The Issues and Crisis Management and Planning team hosted three in-person workshops specifically addressing FMD. One workshop was a tabletop discussion to help Qualified State Beef Council staff think through questions and needs as well as provide them with updated FMD market research insights and crisis plan templates. The other two workshops were conducted with NCBA staff and utilized a third party to develop and walk through potential scenarios. Each exercise was uniquely structured to stimulate differing discussions, considerations, and response efforts. Collectively, these workshops helped improve the FMD preparedness plan, as participants had to think through different possibilities and identify gaps such as the need for specific department/team response plans.



Beef Advocacy Training & Engagement (BATE)

- **Trailblazers Program:** The Trailblazers program selected 10 spokespeople for the 2023-2024 cohort and designed events and resources to enhance their skills, refine their ability to work with national media, and elevate their voices to better safeguard the farming and ranching communities. The program also hosted its first ever Trailblazers Advocacy Summit, where 11 of 20 trained Trailblazers were immersed in various production settings and experiences to further advance their advocacy activation efforts across social media platforms.



Qualified State Beef Council Advocacy Partnerships:

- This program supports Qualified State Beef Councils with training and educational content that develop producers' spokesperson skills for handling media engagements, and keeps them informed of current and emerging topics. These collaborative partnerships elevate Masters of Beef Advocacy (MBA) graduates and the implementation of the MBA Classroom Kit (an advocacy planning guide for instructors and teachers) as program content is customized to ensure participants receive applicable spokesperson skillsets and resources, which vary from state to state.



Beef Quality Assurance (BQA)

- **National Beef Quality Audit (NBQA):** The NBQA provides valuable information about the production of live cattle into beef carcasses, and the 2022 report includes findings for both fed cattle and market cows/bulls. It's important to note the data from this audit was collected under extraordinary circumstances. Supply chain disruptions and a backlog of cattle due to COVID-19, as well as drought across most of the country, are represented in the 2022 NBQA. The audit outlines the industry's positive changes, areas for focused improvement, and lost opportunities for fed cattle and market cows/bulls. Overall, a concluding strategy for industry health and success was evident: utilizing BQA and its principles to improve cattle well-being increases consumer confidence, and enhanced industry commitment could encourage greater beef demand and improve industry coordination.



PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Producer Reach:



Producer Engagement:



KOL² Reach:



KOL² Engagement:



¹ Producer/KOL goals and actual results are aggregated across the AR's three tactics.

² Producer Advocate Leaders



KEY LEARNINGS

- **Issues and Crisis Management and Planning:** Conducting various types of workshops and trainings, such as theoretical scenarios, helped identify areas of opportunity to improve the FMD crisis plan.
- **Beef Advocacy Training & Engagement (BATE):** Working with Qualified State Beef Councils to develop state-specific advocacy content extends the reach of all beef advocacy programs to include MBA courses, the MBA Classroom Kit, and existing/future Trailblazers cohorts.

- **Beef Quality Assurance (BQA):** To leverage existing funds, this program will look to increase collaborative partnerships with other industry associations and allied partners. Being more intentional about these efforts will leverage this program's ability to reach producers to promote their understanding of the positive outcomes these principles provide to the industry and the importance/need for BQA certification/re-certification.

PURPOSE

This AR builds beef demand through in-country relationships, extensive market knowledge, and an understanding of each country's/region's unique consumer demand drivers. In addition, in-depth monitoring and understanding of global economic trends, beef consumption, domestic beef production, and import competitors are used to take advantage of growth opportunities and defend market share.



Activities such as promotions for U.S. beef Short Ribs in Korea (left) and in-store trainings for foodservice professionals in Colombia (above) help increase brand awareness and sales of U.S. beef products in foreign markets.

AR CONTAINS
13 TACTIC &
59 MEASURABLE
OBJECTIVES



¹ Performance Efficiency Measures are not required for the Foreign Marketing AR.

ACCOMPLISHMENT & RESULT HIGHLIGHTS

Promoting Alternative & Affordable Cuts

- **Africa:** Variety meats such as U.S. beef liver have gained significant traction in this market. To promote liver sales, a promotion with OBC stores utilized five well-known influencers to feature U.S. beef liver using the campaign slogan "Yebo Zonke," which translates to "Yes to This Good Life." Broadcasts on major television channels and video posts on social platforms (OBC's Facebook page has over 110,000 followers) provided consumers with delicious recipe ideas and education around the product's nutritional value.



In addition, focus was placed on developing downstream demand in South Africa's foodservice sector by introducing beef variety meat cuts and beef trim items. This effort led to the development of a U.S. burger that debuted at a gourmet franchise chain and received tremendous consumer feedback.

- **Peru:** Looking to grow its U.S. beef sales, a leading importer marketed U.S. beef Knuckle to 125 end-user customers in foodservice and retail. Cooking events for these end-user accounts showcased the flavor and versatility of the Knuckle in a traditional Peruvian dish, Lomo Saltado, which typically uses domestic Tenderloin. As a result of this promotional effort, Lomo Saltado with U.S. beef Knuckle was placed on restaurant menus, and retail outlets in Lima promoted this cut for use in traditional dishes/recipes.



Strengthening & Expanding Sales Channels

- **Africa:** In addition to U.S. beef variety meats, a U.S. white cow program has been established in this market with an importer that has the potential to move significant volume to downstream foodservice accounts. The finishing diets of U.S. ungraded white cow products result in an intramuscular flavor profile that is preferred by consumers compared to local beef. To meet growing consumer demand, work will continue to expand the U.S. white cow program with members of trade.
- **Colombia:** This year, the innovative Butcher Shop Program, that was developed to help Colombian butcher shops improve the sales of U.S. beef, expanded into the foodservice sector. This initiative now works with 77 points of sale, 72 butcher shops, and five restaurants. Through this program, U.S. beef sales ultimately increased due to improved food safety practices, customer service standards, product handling, packing, and merchandising procedures.



- **South Korea:** Promotions for U.S. beef Short Ribs and Short Plate were implemented at 263 large-scale retail outlets. This effort included product samplings, new releases, a collaboration with a popular TV morning show, and the development of content on USMEF social media channels. Participating retailers experienced a sizable increase in sales of U.S. beef Short Ribs. Over the two-week promotion period, sales exceeded \$300,000 and moved 9,323 packages of product (150 mt).

Optimizing Engagement Opportunities

- **Central America:** In this market, simple yet innovative taste-test programs are an effective way to demonstrate U.S. beef's superior attributes. A three-hour educational workshop series emphasized the role of grain feeding in producing quality marbling, which positively impacts beef flavor and tenderness. Sessions conclude with blindfold taste tests, and participants are always amazed by the flavor and tenderness of U.S. beef compared to local, grass-fed beef. In 2023, this engagement opportunity reached 35 importers and more than 600 of their downstream clients.



- **Indonesia:** U.S. beef has strong growth potential in Indonesia's foodservice and retail industries. Indonesia has the world's fourth-largest population, and factors such as rising incomes and robust development of its retail and foodservice sectors point to expanding export opportunities for U.S. beef. To capitalize on market penetration prospects, USMEF engaged with members of trade at its inaugural U.S. Meat Product Showcase in Indonesia.



Nine U.S. suppliers displayed products and met individually with 18 Indonesian importers, 17 processors, and three retailers.



KEY LEARNINGS

- The pandemic left the industry with a higher personnel turnover rate than before. Thus, it's imperative to provide information on the quality and versatility of U.S. beef products as well as proper handling, preparation, and cooking techniques. Although educational activities do not generate immediate sales, they are integral to this program's long-term success.
- With the surge in U.S. beef prices, it is essential to explain the untapped potential of underutilized beef cuts to buyers at all levels and to impart the knowledge and skills necessary to work culinary wonders with them. By presenting the advantages,

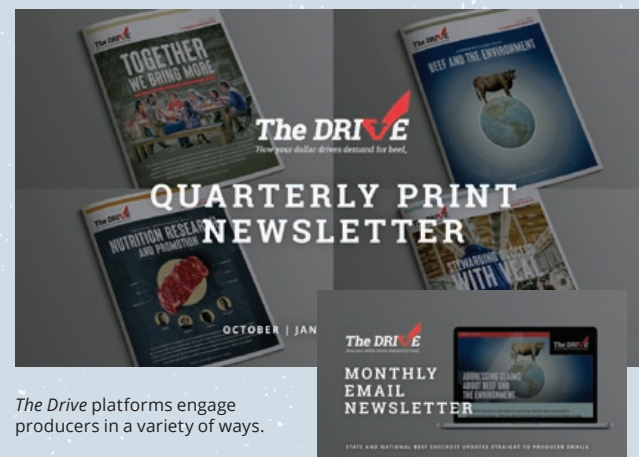
this program unveiled cost-effective and flavorful alternatives to traditional cuts, often offering unique textures and taste profiles.

- A successful communications strategy must include mutually beneficial partnerships with media and digital content creators to ensure the ability to control the delivery and content of program messaging. Costs can vary widely, so ongoing research is a must to determine which platforms/media are feasible and effective to maximize the best return on investment in the form of sales, impacts in new markets, and goodwill content.



PURPOSE

This AR communicates directly with Beef Checkoff investors to build a better understanding of national Beef Checkoff-funded programs. These efforts include online, radio, trade media, printed materials, and partnerships with Qualified State Beef Councils to share Beef Checkoff-funded program information.



The Drive platforms engage producers in a variety of ways.

AR CONTAINS
3 TACTICS &
11 MEASURABLE
OBJECTIVES

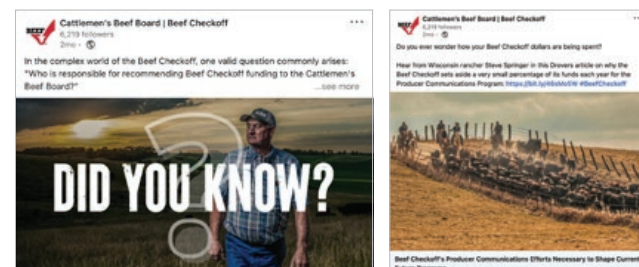


ACCOMPLISHMENT & RESULT HIGHLIGHTS

Producer and Industry In-Person Roundtables:

In 2023, roundtable discussions took place in South Dakota and Washington, as well as with the United States Cattlemen's Association and the Livestock Marketing Association. To address varied sentiments and questions around the Beef Checkoff, producer and industry leaders from these organizations engaged in constructive discussions on hot topics, how the program operates, and created the opportunity to assess where additional learning opportunities and knowledge gaps exist across these audiences. The short-term impact of these roundtables is that representatives of the Beef Checkoff program were simply made available, in person, to provide information. The long-term impact is the opportunity to create relationships with these individuals and groups to continue to work toward the common goal of increasing the demand for beef.

consumer updates, and even quick informational polls. By monitoring content that had the highest engagement, program efforts focused future content to meet preferences of this more specialized audience.



Continued Growth Across The Drive Publishing Platforms: The Drive subscriptions (including both the quarterly print publication and monthly e-newsletter) grew an average of 10% this past fiscal year. A concerted effort to grow online subscriptions to The Drive e-newsletter showed the greatest increase, up 14% in FY23. Print subscriptions to The Drive totaled 132,419, along with an additional 10,000–15,000 as inserts into other ag trade media print publications. In addition, showcasing video content on YouTube for the popular The Drive in Five series garnered new followers and growth on Facebook.



Launch and Growth of Beef Checkoff LinkedIn Page:

LinkedIn showed tremendous growth for the Beef Checkoff, gaining nearly 500 new producer and beef industry followers each month, amounting to nearly 6,000 followers by the end of the fiscal year. This showcased producers' desire to connect with stories focused on the business aspect of the Beef Checkoff program, interviews with Beef Board members,

PERFORMANCE EFFICIENCY MEASURES (PEM)¹



Producer Reach:

Goal: 18,866,397

Actual: 42,325,036



Producer Engagement:

Goal: 72,760

Actual: 120,552



KOL² Reach:

Goal: 3,173

Actual: 3,953



KOL² Engagement:

Goal: 1,617

Actual: 2,442

¹ Producer/KOL goals and actual results are aggregated across the AR's three tactics.

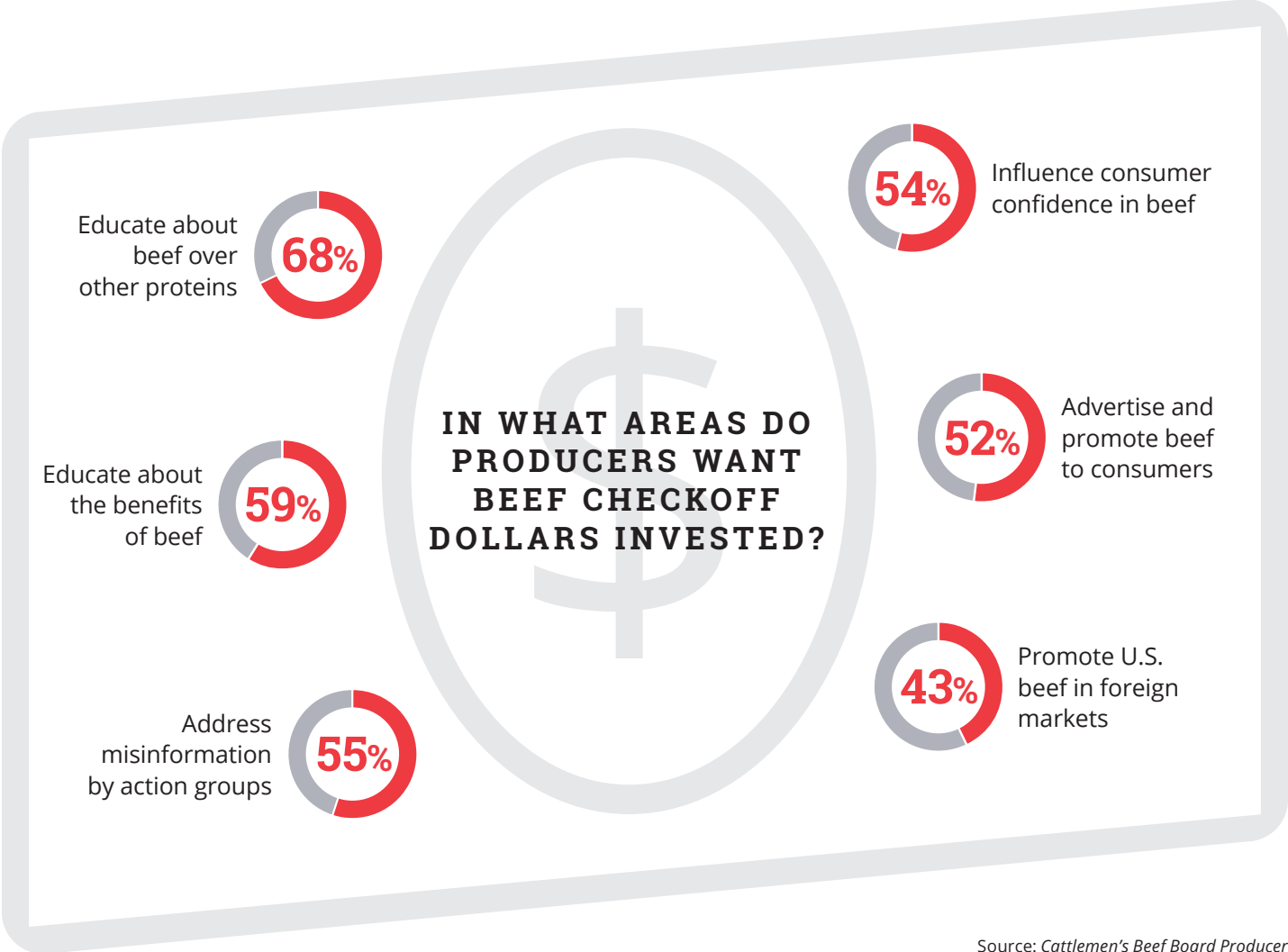
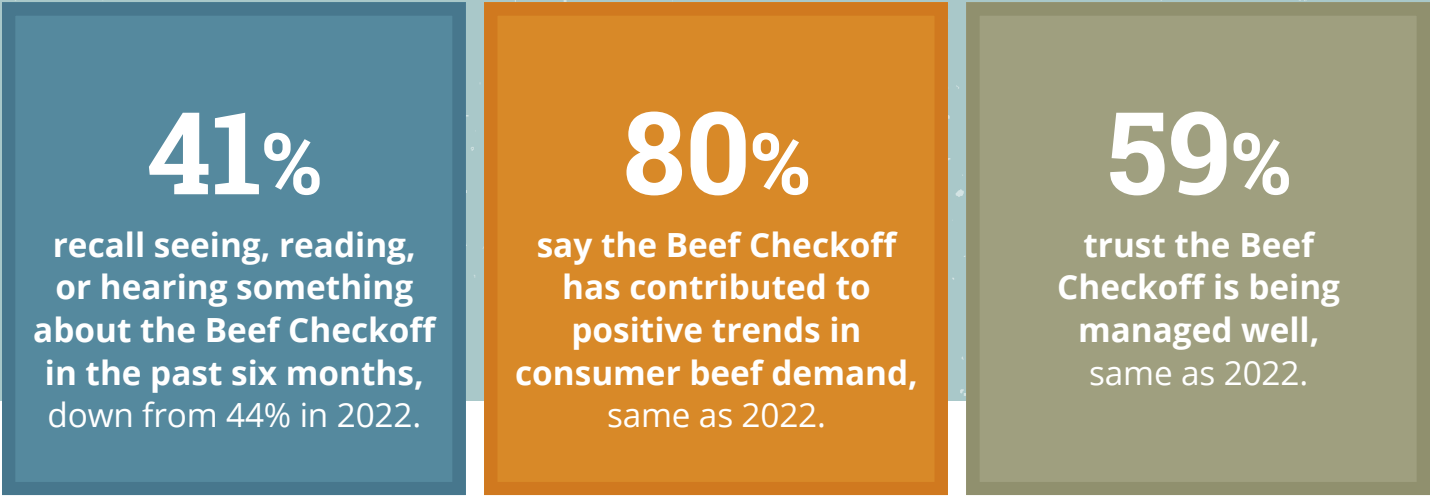
² Producer Leaders



KEY LEARNINGS

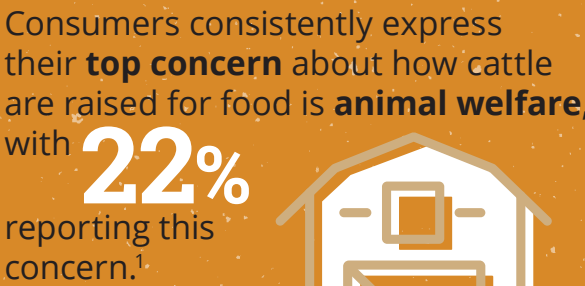
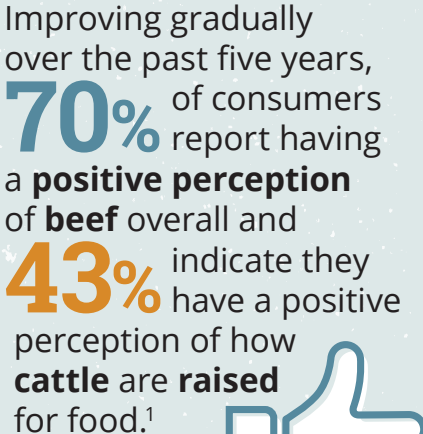
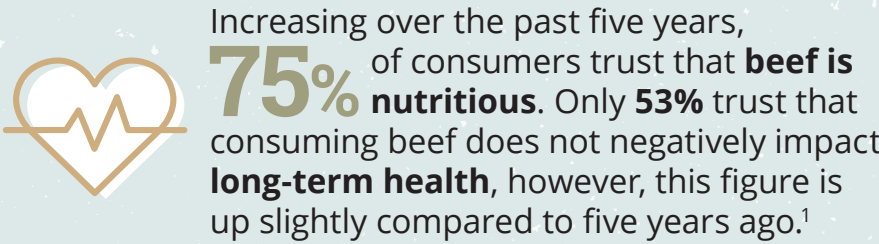
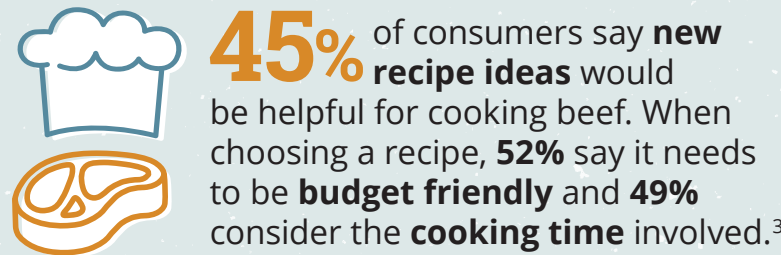
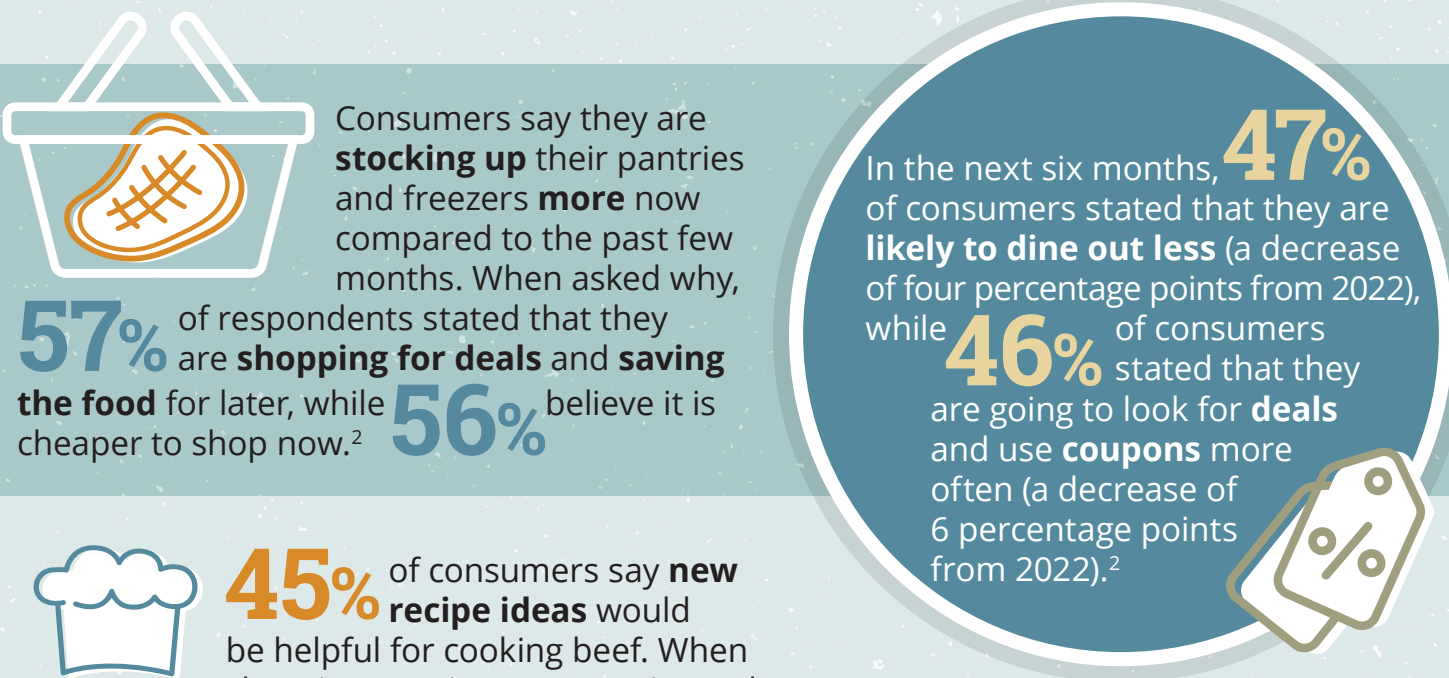
- Producers continue to be hungry for trustworthy sources to understand and learn about the Beef Checkoff, including materials to read, videos to watch, and knowledgeable people to provide answers to their questions.
- The addition of the LinkedIn social platform was a strong move to connect more beef industry followers with the Beef Checkoff program. In FY24, Instagram will be added to reach a more diverse, younger audience.
- In-person events move the needle in building trust with producers and importers farther and faster than through other communications channels.

PRODUCER ATTITUDES ON THE BEEF CHECKOFF



Source: Cattlemen's Beef Board Producer Attitude Survey, Luce Research, January 2023

FY23 CONSUMER ATTITUDES & BEHAVIORS



Sources Cited:
¹ Consumer Beef Tracker, January–September 2023, Directions Research, n=4,495
² State of the Consumer Survey, June 2023, Qualtrics/PureSpectrum, n=1,574
³ Recipe Insights Survey, 2023, Qualtrics/PureSpectrum, n=1,000