

AUTHORIZATION REQUEST FOR FY 21

CBB Budget Category: **Research**

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

Name of Organization Subcontracting:

Start Date: **10/1/2020**

End Date: **9/30/2023**

AR OVERVIEW

AR Description:

The year 2020 turned out to be a historic one for the country, the beef industry, and the beef consumer. The global pandemic shifted how consumers view, purchase, and consume beef. Consumer beef demand spiked as the supply chain was disrupted and consumers rushed to fill their freezer for fear of severe beef shortages and remains strong today. Consumers embraced food delivery from retailers and foodservice outlets and aggressively sought information about beef preparation. Across all AR's managed by NCBA, a contractor to the Beef Checkoff we positioned your *Beef. It's What's for Dinner.* brand as the trusted source of information to meet the demands of consumers and the supply chain and to maintain consumer trust in beef and beef farmers and ranchers. Our FY2020 AR's were nimble enough to adjust quickly to the changing environment, and we did. For example, we leveraged our vast library of engaging cookery content and advertisements, supported efforts to educate consumers about the beef supply chain and the safety of beef, and aggressively engaged media and influencers with relevant information about beef and beef production.

Key questions are: What behaviors will be permanent and what behaviors will revert to pre-pandemic? These questions require that the *Beef. It's What's for Dinner.* brand and other checkoff programming remain nimble as we enter a new consumer marketing and information environment created by the global pandemic.

This AR will continue to develop the successful trust building initiatives launched in 2018 to position beef as the top protein choice. All the tactics in this authorization request work towards two complementary strategies:

1. Communicate that "Real Beef's Great Taste & Nutrition Can't be Replicated," and
2. Address and correct the myths around beef and beef production among various audiences.

To continue to build a strong beef industry brand in *Beef. It's What's for Dinner.* and build trust in the beef industry among a variety of audiences, we will profile and promote beef farmers and ranchers, showcase beef's powerhouse of nutrients, including protein, and remind people of the unbeatable pleasure that beef brings to meals, while conducting research and outreach to prepare for future beef industry needs.

As a result, all tactics in this AR contribute expertise to other checkoff programs, state partners and/or global industry influencers/stakeholders to position beef as the top protein. These tactics provide ongoing counsel and support for the state and national beef council partnership to strengthen the brand across programs at all levels. Sharing program results with a variety of audiences, from stakeholders (including state beef councils and producers) to influencers, to media and to consumers is critical to demonstrate The Beef Checkoff's contributions to the beef industry's success. We will continue to ensure that stakeholders and members of the beef industry see these programs and/or assets first-hand by inviting stakeholders to be part of key events and/or expanding communications and marketing efforts. Given our staff expertise, traveling to/from and attending key influencer/stakeholder/partner meetings may be required to provide or gain more strategic guidance and training, and to engage in briefings and/or educational sessions/events. Besides disseminating knowledge, the funds in this AR may be used to implement current and previously funded ARs. To accomplish this, it may be necessary for the checkoff to fund international travel to/from the U.S. Also note that legal counsel may be sought for routine, day-to-day content development, program planning and contracting to ensure compliance with federal rules or regulations.

Funding	Direct Costs	Implementation	Total
CBB/BPOC Funding Request:	\$4,560,664	\$3,690,100	\$8,250,764

Other Potential Funding	Direct Costs	Implementation	Total
Federation of SBCs Pledges: (Informational Only)	\$1,500,000	\$0	\$1,500,000
Other Funding: (Informational Only)	\$0	\$0	\$0

NOTE: The Federation funds are placeholders only and subject to change. The Federation Division of the NCBA Executive Committee will have jurisdiction and approval over how these funds will be applied to checkoff programs in FY2021.

NOTE: For fiscal year 2021, if the threat of legal challenge does not impact State Beef Council investments, approximately \$5 million will be voluntarily invested by SBCs to supplement NCBA's ARs. This assumes the underlying ARs are funded at a sufficient level to execute the core elements of the program. The supplemental funding will be used consistent with the principles outlined in the AR and deliverables for the industry will increase accordingly.

Long Range Plan Core Strategies Addressed by this AR *(Check all that apply)*

Grow Beef Exports	Consumer Trust	Protect & Enhance	Beef's Value Proposition
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

PROGRAM INFORMATION FOR THIS AR

Tactic A

Tactic Name: Safety Research and Scientific Affairs

Tactic Description:

NCBA, on behalf of the Beef Checkoff, builds the science-based evidence in pre-harvest beef safety used to inform decisions that maintain and improve beef safety throughout the supply chain. Program results also inform communications about the industry's commitment to ensuring the safety of beef.

Results generated through this program are targeted at the scientific community including academia, beef safety decision makers throughout the industry (feedlot operators, packers, processors, retail, foodservice) and regulatory sectors as well as state beef councils and other checkoff program areas that communicate or manage beef safety issues (pre- and post-harvest).

Over time, this program has evolved from a single pathogen focus (*E. coli*) to address several potentially harmful bacterial, chemical or physical threats to beef safety. As the microbial environment evolves, other pathogens such as *Salmonella* challenge beef's safety. Today, consumers expect beef to be safe from pathogens and other safety threats, but also that the beef industry takes steps to understand how production practices like antibiotic use and resistance can be reduced with the development of alternative products. Research in this program has been used to respond to inquiries from the industry, media, regulatory and other thought leaders about industry's commitment and progress toward addressing these consumer/influencer concerns.

In 2021, safety research project concepts will be funded to understand and/or reduce the safety threats by known pathogens, chemical compounds or by antimicrobial use (current or new alternatives) and resistance formation or transfer that may impact human health. Research outcomes will be shared with advisory groups developing safety guidance, the scientific and regulatory communities in public forums/symposia (i.e., Beef Industry Safety Summit and other scientific forums), through written materials, visual tools or in-person meetings. Strategic planning sessions will be conducted as needed with third-party experts to refine beef safety research gaps.

Measurable Objectives *(List relevant outcome-based objectives for this tactic):*

- Conduct a minimum of three original scientific research projects focused on pre-harvest challenges to beef safety.
- Showcase safety research program content through at least one avenue such as the Beef Industry Safety Summit, scientific conferences, peer review articles, or forums hosted by other entities.
- Leverage a minimum of two beef safety research results across at least two tactical areas of the beef science communications framework.

Performance Efficiency Measures

Consumer Reach Goal:

Consumer Engagement Goal:

KOL Reach Goal:

KOL Engagement Goal:

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt animal I.D. traceability systems <input type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input checked="" type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input checked="" type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input checked="" type="checkbox"/> Research & innovate new production technologies <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage in issues <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & communicate directly with consumers <input type="checkbox"/> Improve our product

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovation	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tactic B

Tactic Name: Nutrition Research and Scientific Affairs

Tactic Description:

NCBA, on behalf of the Beef Checkoff, leads scientific research on beef's role in a healthy diet and directly shares it with the scientific community. This work is also used to ensure beef nutrition communications to media, food and health thought leaders, consumers and agriculture advocates are based in sound science and that the research supported by this program also becomes part of the evidence base considered for dietary recommendations. As the only beef centric U.S. based nutrition research initiative on understanding beef's positive role in health, this program uniquely contributes to the "body of science" needed to promote, protect and defend beef's role in health.

This program is targeted to the scientific community including those in academia, government and health organizations (such as American Heart Association), scientific associations (American Society for Nutrition and Institute of Food Technologists), other checkoff programs, state beef council partners, and industry (corporate scientists in food and/or health and wellness companies).

Since the 1920s, Beef Checkoff nutrition research has contributed important discoveries about beef's role in health. Recently, this program has demonstrated beef's positive role in healthy diets across the lifespan, such as: beef's nourishing role in the early years; beef's role in preserving muscles through aging and how beef can be the protein of choice in diets recommended for weight management, heart health and diabetes. Checkoff research also has been used to effectively refute the hypotheses about a proposed relationship between meat and cancer and myths about overconsumption.

Nutrition research will be funded on the role of beef in diets for supporting healthier metabolisms, beef's unique nutrient matrix, strength and performance, and its impact as a source of nourishment across the lifespan. Emerging or hot scientific topics such as sustainable nutrition will be monitored and addressed through scientific communications and research. Research findings will be shared with the scientific community, including advisory groups developing nutrition guidance, in scientific forums (symposia), written materials (public comments, manuscripts, fact sheets) visual tools (infographics, video, web content) and in-person briefings. Strategic planning sessions will be conducted as needed to document beef human nutrition research gaps.

Measurable Objectives *(List relevant outcome-based objectives for this tactic):*

- Conduct a minimum of three original human nutrition research studies on healthy diets, where beef is used as the primary source of dietary protein.
- Maintain engagement of 45% in 2021 of the top 100 Nutrition Science Influencers (as identified by historical data monitoring).
- Leverage a minimum of two human nutrition research results across at least two tactical areas of the beef science communications framework.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input checked="" type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input checked="" type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input checked="" type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovation	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tactic C

Tactic Name: Product Quality Research and Technical Expertise

Tactic Description:

NCBA, on behalf of the Beef Checkoff, leads the primary product quality and meat science research focused initiative in the U.S. This program generates unique scientific research to reduce product inconsistencies, and to improve beef eating satisfaction and consumer taste perceptions of beef products.

Taste is beef's top demand driver and the top reason consumers chose beef. To protect this most important product attribute, this tactic has delivered peer-reviewed meat science research to document how taste develops in beef products and demonstrate methods for taste consistency with the goal of generating and more repeat beef purchases. Examples of highly visible research completed by this program include the National Beef Tenderness and Flavor Surveys, development of a beef flavor lexicon to describe unique flavor attributes, and historical muscle profiling research, which led to development and marketing of innovative beef cuts.

Research results and insights have been delivered to multiple audiences including academic scientists and scientific organizations (such as the American Meat Science Association), and technical experts or industry scientists at supply chain partners such as packers, processors, foodservice and retail. Also targeted are other existing checkoff programs (i.e., consumer marketing), state beef council partners, and allied industry stakeholders and influencers (such as USMEF).

In 2021, product quality research project ideas will be solicited from and executed at universities and scientific institutions to improve beef's quality and taste by evaluating pre-and post-harvest factors that impact the three specific palatability attributes of beef flavor, tenderness and juiciness. Industry expert partners will assist in evaluation of research project ideas solicited to address these topics.

Research findings will be shared via public conferences (i.e., the annual Reciprocal Meats Conference), written materials, visual tools and/or in-person meetings. Strategic planning sessions will be conducted as needed with third-party experts to refine product quality research gaps.

Program technical expertise will continue to ensure checkoff programs and external partners have a key point of contact for knowledge on beef products, strategic insight on cut utilization, product inquiry responses, etc.

Measurable Objectives *(List relevant outcome-based objectives for this tactic):*

- Conduct a minimum of four original scientific research projects focused on improving product quality and taste consistency.
- Showcase product quality research program content through a minimum of two avenues including avenues such as scientific conferences, peer review articles, and the www.beefresearch.org website.
- Leverage a minimum of two product quality research results across at least two tactical areas of the beef science communications framework.

LRP Strategic Initiatives Addressed by this Tactic (Check all that apply)

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input checked="" type="checkbox"/> Defend beef's product identity	<input checked="" type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input checked="" type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic (Check all that apply)

Consumer Trust	Export Growth	Innovation	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tactic D

Tactic Name: Culinary Expertise

Tactic Description:

NCBA, on behalf of the Beef Checkoff, provides culinary support for other tactics, partners and state beef council programs.

Historically, the program has provided beef recipes/recipe photography to be used on BeefItsWhatsForDinner.com and checkoff social properties. In 2020, the program provided culinary expertise for content executed through other tactics including the Beef Substitutes post by nationally recognized chefs and posts by food influencers (*Thought Leader Outreach and Engagement*) to ensure the recipes proposed followed the style guide and safety criteria required for other checkoff work.

In 2021, this program will extend beef cookery expertise to support numerous checkoff audiences (such as media, thought leaders, supply chain operators and state beef

council partners) in the execution of their programming to ensure beef recipes and related content cast beef as the top protein.

Measurable Objectives *(List relevant outcome-based objectives for this tactic):*

- Provide culinary expertise to other national or state partner programs that showcase beef’s unique attributes through eight interactions.
- Leverage a minimum of two culinary insights across at least two tactical areas of the beef science communications framework and/or supply chain outreach channels.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef’s Value Proposition
<input type="checkbox"/> Adopt traceability systems <input type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input type="checkbox"/> Protect beef’s image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef’s inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef’s product identity	<input checked="" type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef’s nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovation	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tactic E

Tactic Name: Sustainability Research and Scientific Affairs

Tactic Description:

NCBA, on behalf of the Beef Checkoff, provides science-based evidence to inform and engage industry stakeholders on the comprehensive sustainability of beef. Though a complex topic for all audiences, sustainability research continues to provide clarity for audiences by identifying and benchmarking areas for improvement. Research in this program advances life cycle assessment science to measure beef sustainability using a balanced approach that includes social, economic, and environmental indicators.

Multiple audiences are targeted with this program work, including the scientific community, regulatory decision makers, the supply chain sectors (retail, foodservice, packers and the feeding sector), and those that influence consumer opinion (health professionals and consumer media).

Previous completion of the foundational U.S. beef sustainability life cycle assessment (LCA) has measured the beef industry's improvements on beef sustainability footprint and provided a benchmark to share with the public. The collection of region-specific data continues to reflect the geographical differences in how beef is raised sustainably. As the field matures, the program has evolved to identify alternative research needs in line with the three sustainability pillars (social, economic and environmental) in order to more accurately reflect the true sustainability of beef, and better inform future assessments (environmental and socioeconomic). It is critical for the beef industry to better understand these complex topics to maintain consumer confidence in the way beef is produced today.

In 2021, research will be funded to measure improvements in beef sustainability in one or more of the three sustainability pillars (social, economic or environmental). This includes collecting data to benchmark and demonstrate beef's unique positive contribution to society by investigating the social, economic and environmental impacts of cattle to grazing lands and communities, animal welfare practices, worker safety and contribution and evolving consumer perceptions of sustainability. Scientific outreach will focus on industry adoption of new evidence, measurement parameters, or opportunities that bring these key audiences together. Technical presentations will be identified to share key outcomes. Based on research, tools will continue to be developed that educate various audiences about beef sustainability in conjunction with other tactics. Strategic planning sessions will be conducted as needed to refine beef sustainability research gaps.

Measurable Objectives *(List relevant outcome-based objectives for this tactic):*

- Conduct a minimum of four original scientific research projects focused on understanding the sustainability of beef systems and the beef value chain.
- Inform a minimum of two audiences (i.e., scientific community, consumer or industry influencers, retail or foodservice, etc.) on how beef is sustainably raised today.
- Leverage a minimum of two sustainability research results across at least two tactical areas of the beef science communications framework.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input type="checkbox"/> Revolutionize beef marketing & merchandising <input checked="" type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovation	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input checked="" type="checkbox"/>	<input type="checkbox"/>					

Tactic F

Tactic Name: Channel Intelligence

Tactic Description:

NCBA, on behalf of the Beef Checkoff, provides insights that enable all checkoff programs to develop and implement more effective demand driving initiatives. Channel intelligence accomplishes this by leveraging a variety of industry data sources and other fact-based information to inform channel and marketing programs about key trends impacting the consumption of beef. It also plays an important role in the development of state, national and industry-wide annual and long-range plans, by spotlighting key industry challenges and opportunities.

Decisions that impact the beef industry, and ultimately beef consumption, must be fact-based to ensure industry resources are applied as efficiently as possible. While companies and organizations across the industry apply their efforts and resources to drive specific growth and profit, checkoff-funded channel intelligence efforts are focused exclusively on understanding those challenges and opportunities impacting part or all of the beef supply chain. No other entity plays this role as directly as the Beef Checkoff. Industry stakeholders, including state and national checkoff programs, rely on this Beef Checkoff funded intelligence to make smart, strategic and demand-driving decisions. For example, data and insights from this tactic were instrumental in keeping the checkoff up to date on how beef was trending before and during the pandemic. This information was key to keeping producers, state partners and the channels informed to support planning efforts and ensure ongoing data-driven decisions were being made. Another example would be the tracking of plant-based meat substitutes and the recognition that despite the media attention they receive, these meat substitutes still only represent less than 1% share of the total beef market.

Specifically, this tactic will build on past industry metrics by continuing to monitor, analyze and disseminate beef retail and foodservice information to industry influencers/stakeholders to enhance performance, inform communications and leverage beef's competitive advantage in the marketplace. The tactic will also provide knowledge on supply dynamics, prices, and pound volumes – by primal, cut, claim (such as production type, breed, grade) and foodservice channel insights—along with featuring activity and menu trends, to assist checkoff communication teams, channel members, media, state boards, producers and others in planning and execution to strengthen beef's value. Key data sources include retail volumes, price and featuring activity as well as foodservice menu activity and sales volumes. Insight specific to the competitive protein market (e.g., meat substitutes, chicken, pork, etc.) will also be gathered. All these data and insights will continue to inform checkoff programs including supply chain, issues management, marketing communications, and planning ultimately to promote and strengthen beef's value proposition.

Measurable Objectives *(List relevant outcome-based objectives for this tactic):*

- Average 10 channel intelligence data responses per month to broaden the reach of checkoff funded insights and support research and communications programs. Responses contingent on requests.
- Monitor and summarize meat substitute sales at retail and foodservice at least quarterly to inform three checkoff-funded programs and update state beef councils.
- Leverage a minimum of four channel intelligence results across at least one tactical area of the beef science communications framework.
- Convey industry thought leadership by authoring quarterly articles on retail sales and foodservice trends for posting on the *Beef. It's What's For Dinner* website.

LRP Strategic Initiatives Addressed by this Tactic *(Check all that apply)*

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input checked="" type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic *(Check all that apply)*

Consumer Trust	Export Growth	Innovation	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input checked="" type="checkbox"/>	<input type="checkbox"/>					

Tactic G

Tactic Name: Foundational Market Research

Tactic Description:

NCBA, on behalf of the Beef Checkoff, provides insights that reach across checkoff demand building and issues management efforts. These studies accomplish this by assessing broad consumer/influencer/stakeholder attitudes, knowledge and needs, and by tracking progress towards key long-term goals. It also plays an important role in the development of state, national and industry-wide annual and long-range planning by identifying key industry challenges and opportunities.

Specifically, this tactic will include the tracking of the most important consumer attitudes, usage of and preference for beef. These studies monitor beef's ongoing competitive position in the marketplace related to beef's value proposition, focusing on key attributes that support the beef industry long range plan. Surveying 500 consumers each month, the consumer beef tracker data, for example, is analyzed to uncover and track beefs strengths and challenges to support checkoff program development and overall industry awareness. Insights are disseminated widely across the industry and data is integrated into internal planning presentations, consumer and influencer promotion and public relations campaigns, state trend overviews and supply chain efforts focused on opportunities for increasing beef demand.

For example, data gathered from this tactic has provided consumer insights that clearly show that consumer beef consumption and positive perceptions of beef were not impacted during the pandemic, and in some cases were even stronger. Further, this tactic has also determined that consumers who have tried plant-based meat substitutes are still eating beef just as frequently as they ever have. In fact, meat substitutes are just considered one more option among a variety of food choices consumer have to choose from.

More specifically:

- The checkoff-funded consumer beef tracker will continue to build on years of insight. The tracker will gather feedback from 1,500 consumers each quarter focusing on beef attitudes and behaviors across several attributes including taste, nutrition and production, as well as insights specific to meat substitutes. The tracker is an ongoing survey with data summaries available as needed to support checkoff programs and provide key demand-driving insights.
- With the consumer beef tracker, ongoing consumer segmentation analyses will be conducted to ensure checkoff-funded campaigns are focused on the right targets, with the right message, at the right time.
- This tactic will also measure the ongoing effectiveness of checkoff-funded campaigns focused on taste, strength and responsibly raised beef. These

measures, included in the consumer beef tracker, provide a periodic read on how the various campaigns are impacting consumer perceptions of beef. These results serve to inform improvements to campaign planning and execution.

- In addition, ongoing consumer beef tracking insights will be provided to a number of state beef councils to support their in-state planning and program execution efforts.

Measurable Objectives *(List relevant outcome-based objectives for this tactic):*

- Share consumer tracker updates with all state beef council partners, key beef industry stakeholders and checkoff program managers to help ensure checkoff priority decisions continue to be data driven. Dissemination will include posting on relevant websites accessible by industry stakeholders and presentation of key findings (webinar or in-person) with at least fifteen state beef councils.
- Execute and present results of state dashboard measurements as requested for at least 10 state beef councils at least once a year.
- Execute ongoing campaign measurement at least quarterly to understand how campaigns are performing. Results will be shared with industry stakeholders and state beef council partners.
- Leverage a minimum of two foundational market research results across at least one tactical area of the beef science communications framework.

LRP Strategic Initiatives Addressed by this Tactic (Check all that apply)

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input checked="" type="checkbox"/> Defend beef's product identity	<input checked="" type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic (Check all that apply)

Consumer Trust	Export Growth	Innovation	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tactic H

Tactic Name: Key Topic Market Research

Tactic Description:

NCBA, on behalf of the Beef Checkoff, will explore key topic areas, with individual studies digging deep on a specific subject. An example is the research conducted to support the development and execution of the *Beef Quality Assurance campaign launched in Fall of 2019*. Included in this tactic will be studies designed to inform program efforts in the areas of marketing communication, nutrition, issues management and production that address beef-specific challenges and opportunities. These studies focus primarily on the consumer, but strategic learnings from key influencers are considered and pursued as necessary.

Projects in this tactic planned for FY2021 will specifically support long range plan initiatives and committee priorities, falling into the following categories.

- Nutrition – Checkoff-funded studies in this area will directly support several long-range plan initiatives, including protecting beef's image, communicating beef's nutritional benefits and helping revolutionize the meat shopping

experience by capturing key learnings from consumers and influencers about beef's nutritional benefits.

- Marketing Communication – Checkoff-funded studies in this area will support the development and execution of checkoff funded promotional campaigns and associated innovations. User assessments will continue to determine the impact of current online promotional programs and satisfaction with BeefItsWhatsForDinner.com to support supply chain efforts, understanding new paths to purchase and evolving purchase behaviors (e.g., meat substitutes, online ordering, etc.).
- Issues/Production – Checkoff-funded studies in this area will directly support several long-range plan initiatives including ensuring beef's safety, protecting beef's image, and connecting & communicating directly with consumers. Output will include key learnings about messaging, consumer perceptions of production, and proof points that relate to stewardship topics and issues of response and preparedness.

Measurable Objectives *(List relevant outcome-based objectives for this tactic):*

- Conduct one study that supports campaign development designed to leverage beef's taste advantage (e.g., message testing, video treatments, etc.). Disseminate insights that support beef demand with checkoff programs and industry stakeholders, including state beef councils.
- Conduct one study that supports campaign development designed to inform consumers and/or influencers about beef's nutritional benefits (e.g., message testing, video treatments, etc.). Disseminate insights that support beef demand with checkoff programs and industry stakeholders, including state beef councils.
- Conduct one study that supports campaign development designed to inform consumers and/or influencers about how beef is responsibly raised (e.g., message testing, video treatments, etc.). Disseminate insights that support beef demand with checkoff programs and industry stakeholders, including state beef councils.

LRP Strategic Initiatives Addressed by this Tactic (Check all that apply)

Drive Export Growth	Grow Consumer Trust	Protect & Enhance Business Climate	Beef's Value Proposition
<input type="checkbox"/> Adopt traceability systems <input type="checkbox"/> Increase market access <input type="checkbox"/> Promote unique attributes of U.S. beef	<input type="checkbox"/> Ensure antibiotic stewardship <input type="checkbox"/> Certify & verify production practices <input checked="" type="checkbox"/> Ensure beef safety <input checked="" type="checkbox"/> Protect beef's image <input type="checkbox"/> Engage beef advocates	<input type="checkbox"/> Research & innovate new production tech. <input type="checkbox"/> Ensure beef's inclusion in dietary recommendations <input type="checkbox"/> Motivate producers & stakeholders to engage <input type="checkbox"/> Develop crises management plans <input type="checkbox"/> Attract, develop & enable the next generation <input type="checkbox"/> Defend beef's product identity	<input checked="" type="checkbox"/> Revolutionize beef marketing & merchandising <input type="checkbox"/> Measure & improve sustainability <input checked="" type="checkbox"/> Research & communicate beef's nutritional benefits <input checked="" type="checkbox"/> Connect & comm. with consumers <input type="checkbox"/> Improve product & production efficiency

Committee(s) to Score this Tactic (Check all that apply)

Consumer Trust	Export Growth	Innovation	Nutrition & Health	Safety	Investor Relations	Mkt. Research
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SUPPLEMENTAL INFORMATION FOR THIS AR

1. Please explain changes from FY 2019 approved AR:

The research tactics A, B, C and E build upon research priorities of the previous year as the research roadmaps are for five years, aligning with the current Long Range Plan. However, the scientific acceptance efforts continue to develop from previous years. The above tactics indicate a continued narrower focus as resources have become more limited. Outreach and education activities continue to be essential to spur implementation/adoption of science and technical knowledge.

2. List any proposed vendors/agencies that will be used to complete the work in this AR.

Various laboratories, universities, health science centers and their affiliated research scientists, independent research companies, government agencies, and other contractors and vendors will complete the research program outlined (tactics A, B, C and E). Subcontractors will be chosen via a request for proposals process and/or through the development of targeted research projects that are based on previous research expertise, budget rational, and industry need and committee priorities.

In tactic D, professional food photographers/stylists or recipe testers may be utilized.

IPSOS U.S. Public Affairs, Google Analytics and Toluna have solutions for consumer issues and consumer preference research that provide for speedier results. Work related to consumer tracking will be conducted by Directions Research. They were assessed and selected after a competitive bid process due to their deeper knowledge of consumer tracking and segmentation analysis. Technomic and NPD will continue to provide insights into the foodservice channel. They also provide a suite of strategic services and proprietary databases used by channel intelligence to explore and act on a variety of foodservice insights. IRI has built a custom system for analyzing the value of beef sold at retail, starting with scanner data, and reassembling cuts back to beef primals, so that long-term value to producers can be tracked. Other contractors will be selected based on expertise in respective areas (e.g., nutrition) and will be part of the competitive bid process.

3. Will all work with subcontractors be competitively bid?

No

If not, why not?

Because of the broad scope of the work in this AR, various entities will be utilized for expertise, see above.

4. Please list any relationships between this AR and projects previously funded by the Operating Committee:

The programs in tactics A, B, C, D and E builds upon, but does not duplicate work from previous ARs and is leveraged by this, other checkoff programs, key industry stakeholders and the research community.

Some of the research included in this AR is ongoing tracking research that has been funded for a number of years (foodservice insights, IRI retail data). It is important that the industry stay current on consumer trends and perceptions to ensure that the industry is properly responding to changes as they occur.

CBB/BPOC Funding Request:

Committee Name	Tactic	Tactic Name	Funding Source	Direct	Implementation	Total
Safety	A	Safety Research and Scientific Affairs	BPOC	\$ 700,000	\$ 372,700	\$ 1,072,700
Nutrition and Health	B	Nutrition Research and Scientific Affairs	BPOC	\$ 1,500,000	\$ 1,095,600	\$ 2,595,600
Innovation	C	Product Research and Technical Expertise	BPOC	\$ 700,000	\$ 139,000	\$ 839,000
Innovation	D	Culinary	BPOC	\$ 75,664	\$ 227,400	\$ 303,064
Consumer Trust	E	Sustainability Research and Scientific Affairs	BPOC	\$ 700,000	\$ 770,500	\$ 1,470,500
Consumer Trust	F	Channel Intelligence	BPOC	\$ 340,000	\$ 415,400	\$ 755,400
Nutrition and Health	G	Foundational Market Research	BPOC	\$ 185,000	\$ 338,000	\$ 523,000
Innovation	H	Key Topic Market Research	BPOC	\$ 360,000	\$ 331,500	\$ 691,500
AR Totals				\$ 4,560,664	\$ 3,690,100	\$ 8,250,764

Federation of SBCs Pledges/Other Funding Source(s): (Informational Only)

Committee	Tactic	Tactic Name	Funding Source	Direct	Implementation	Total
Safety	A	Safety Research and Scientific Affairs	Federation			\$ -
Nutrition and Health	B	Nutrition Research and Scientific Affairs	Federation			\$ -
Innovation	C	Product Research and Technical Expertise	Federation			\$ -
Innovation	D	Culinary	Federation			\$ -
Consumer Trust	E	Sustainability Research and Scientific Affairs	Federation			\$ -
Consumer Trust	F	Channel Intelligence	Federation			\$ -
Nutrition and Health	G	Foundational Market Research	Federation			\$ -
Innovation	H	Key Topic Market Research	Federation			\$ -
AR Totals				\$ 1,500,000	\$ -	\$ 1,500,000

NOTE: The Federation funds are placeholders only and subject to change. The Federation Division of the NCBA Executive Committee will have jurisdiction and approval over how these funds will be applied to checkoff programs in FY2021.

NOTE: For fiscal year 2021, if the threat of legal challenge does not impact State Beef Council investments, approximately \$5 million will be voluntarily invested by SBCs to supplement NCBA's ARs. This assumes the underlying ARs are funded at a sufficient level to execute the core elements of the program. The supplemental funding will be used consistent with the principles outlined in the AR and deliverables for the industry will increase accordingly.

Summary of Prior Year AR Budgets and Expenses:

Summary of Prior Year Budget:	FY 2020 Approved Budget						
	CBB/BPOC	FSBCs	Other Source(s)	Total	Direct Cost	Impl.	Total
AR Totals	\$ 8,379,603	\$ 825,000		\$ 9,204,603	\$ 4,711,203	\$ 4,493,400	\$ 9,204,603

FY 2020 Actual Expenses (through June 30, 2020)	FY 2020 Actual Expenses						
	CBB/BPOC	FSBCs	Other Source(s)	Total	Direct Cost	Impl.	Total
AR Totals	\$ 4,339,315	\$ 682,284		\$ 5,021,599	\$ 2,045,911	\$ 2,975,688	\$ 5,021,599

Historical Summary of Budgets and Expenses: (includes all funding sources listed in original AR)

	Total Approved Budgets			Total Actual Expenses		
	FY 2019	FY 2018	FY 2017	FY 2019	FY 2018	FY 2017
AR Totals	\$ 9,684,000	\$ 9,667,200	\$ 10,671,600	\$ 7,851,541	\$ 9,112,427	\$ 10,624,716