

## AUTHORIZATION REQUEST FOR FY 2022

CBB Budget Category: **Research**

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

Name of Organization Subcontracting:

Start Date: **10/1/2021**

End Date: **9/30/2024**

### **AR OVERVIEW**

#### **AR Purpose and Description:**

The new Beef Industry Long Range Plan (LRP) for 2021-2025 provides core strategies and initiatives with a vision for beef to be the protein of choice around the world; trusted and respected for the commitment to quality, safety and sustainability. The Authorization Requests (ARs) brought by the National Cattlemen's Beef Association (NCBA), as a contractor to the Beef Checkoff, utilizes additional insights from consumer market research that shows what areas most directly drive consumer demand for beef: eating experience, nutrition, how food is raised/grown, convenience/versatility and price. The tactics in this AR outline programs and measurable objectives to drive and/or protect demand that ultimately work toward achieving the goals outlined in the LRP. Specifically, this Research AR outlines tactics to provide science-based information through in-house or commissioned research projects in the areas of pre-harvest beef safety, human nutrition, product quality and culinary, sustainability and market research.

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 extend and leverage previously funded efforts. 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
<b>CBB/BPOC Funding Request:</b>	\$4,353,900	\$3,746,100	\$8,100,000

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

\*The Federation funds are placeholders only and are subject to change. The Federation Division of the NCBA Executive Committee will have jurisdiction and approval over how these funds will apply to Checkoff programs in FY 2022. For FY 2022, if the threat of legal challenges does not impact State Beef Council investments, approximately \$4-5 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.

### **Beef Industry Long Range Plan (LRP) Core Strategies Addressed by this AR**

Drive Growth in Beef Exports	Grow Consumer Trust in Beef Production	Develop & Implement Better Business Models & Value Distribution Across All Segments	Promote & Capitalize on the Multiple Advantage of Beef	Improve the Business & Political Climate of Beef	Safeguard & Cultivate Investment in Beef, Industry Research, Marketing & Innovation
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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 evolve and improve the safety of the beef they purchase. Research in this program has been used to respond to inquiries from the industry, media, regulatory and other thought leaders about the industry's commitment and progress toward addressing these consumer/influencer concerns.

With the new LRP, a new research roadmap has been developed with an industry expert advisory group. The roadmap focuses on pathogen mitigation strategies, harbors, and physiology. In 2022, projects will be funded to fill knowledge gaps in each pillar of the roadmap. Research outcomes will be shared with advisory groups developing safety guidance, and 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. This tactic directly addresses the demand drivers of eating experience and how food is raised/grown that influence consumption and preference.

**Measurable Objectives**

*(For tactics \$100,000 or less two measurable objectives are required and for tactics over \$100,000 at least three to five measurable objectives are required by the Checkoff Evaluation Committee):*

- Conduct a minimum of two original scientific research projects focused on the new research roadmap pillars of mitigation strategies, harbors and physiology of pathogens.
- Showcase safety research program content through two venues such as the Beef Industry Safety Summit, scientific conferences, or forums hosted by other entities.
- Disseminate a minimum of five beef safety research results to support the new research roadmap posted on BeefResearch.org.

**Performance Efficiency Measures**

**Consumer and/or Producer Reach Goal: N/A**

**Consumer and/or Producer Engagement Goal: N/A**

**Key Opinion Leader Reach Goal: N/A**

**Key Opinion Leader Engagement Goal: N/A**

**LRP Initiatives Addressed by this Tactic**

Drive Growth in Beef Exports	Grow Consumer Trust in Beef Production	Develop & Implement Better Business Models & Value Distribution Across All Segments	Promote & Capitalize on the Multiple Advantage of Beef	Improve the Business & Political Climate of Beef	Safeguard & Cultivate Investment in Beef, Industry Research, Marketing & Innovation
<ul style="list-style-type: none"> <li><input type="checkbox"/> Drive adoption of traceability</li> <li><input type="checkbox"/> Identify &amp; address export customer needs and values</li> <li><input type="checkbox"/> Collaborate with targeted partners to promote U.S. beef in foreign markets</li> <li><input type="checkbox"/> Invest in research, marketing &amp; education programs</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Measure, document, improve &amp; communicate the net environment impact of beef production</li> <li><input type="checkbox"/> Educate medical, diet &amp; health professionals about beef &amp; beef production</li> <li><input type="checkbox"/> Align and collaborate with traditional &amp; nontraditional partners to tell the positive story of beef production</li> <li><input type="checkbox"/> Engage positively in the sustainable nutrition conversation</li> <li><input type="checkbox"/> Expand efforts in education the general public about BQA program &amp; it's impact on animal well-being</li> <li><input type="checkbox"/> Expand BQA program to include verification</li> <li><input type="checkbox"/> Develop a direct-to-consumer beef safety campaign</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use innovative methods &amp; technologies to value carcasses based on eating satisfaction &amp; red meat yield</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Promote the role of beef in a health &amp; sustainable diet</li> <li><input type="checkbox"/> Implement a marketing campaign that communicates beef's advantage compared to alternative proteins</li> <li><input type="checkbox"/> Develop targeted marketing programs focused on the highest opportunity market segments</li> <li><input type="checkbox"/> Cultivate collaborative promotion partnerships</li> <li><input type="checkbox"/> Promote innovative online marketing, packaging &amp; shipping solutions to enable the direct marketing of beef</li> <li><input type="checkbox"/> Engage consumers in a memorable beef eating experience</li> <li><input type="checkbox"/> Develop a more interactive &amp; exciting beef purchasing experience</li> <li><input type="checkbox"/> Promote underutilized beef cuts &amp; new variety meat product</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Demonstrate beef's positive sustainability message &amp; key role in regenerative agriculture</li> <li><input type="checkbox"/> Defend beef's product identity</li> <li><input type="checkbox"/> Ensure beef's inclusion in dietary recommendations</li> <li><input checked="" type="checkbox"/> Drive continuous improvement in food safety</li> <li><input type="checkbox"/> Develop crisis management plans</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Attract innovative &amp; intellectual capital into the beef industry</li> <li><input type="checkbox"/> Encourage the cooperation &amp; collaboration of existing industry advisory committees to identify &amp; prioritize research efforts</li> </ul>

**Committee(s) to Score this Tactic**

Consumer Trust	Domestic Marketing	International Marketing	Nutrition & Health	Safety & Product Innovation	Stakeholder Engagement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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 with media and other consumer influencers are based on sound science, as well as considered in 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 healthy diets to nourish and optimize Americans' health at every life stage.

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).

Recently, this program has demonstrated beef's positive role in healthy diets across the lifespan, such as the importance of beef as a source of iron and other nutrients in the diets of infants and children, beef's role in preserving muscles through aging and how beef can support weight management, heart health, and blood sugar control. Checkoff research utilizes science to drive understanding of how beef is a source of nourishment in sustainable, healthy diets.

With the new LRP, a new research roadmap has been developed with input from an industry and external expert advisory group. In 2022, research projects will be funded in alignment with the roadmap, focusing on evaluating beef's role in optimal human health and wellbeing and the prevention of chronic diseases. Scientific reviews of emerging beef relevant topics will also be commissioned. Through scientific affairs activities, such as briefings, symposia, conferences, written materials and visual tools (infographics), this program will aim to drive acceptance of beef nutrition science within the scientific community. This tactic directly addresses the demand drivers of nutrition and how food is raised/grown that influence preference and consumption.

**Measurable Objectives**

*(For tactics \$100,000 or less two measurable objectives are required and for tactics over \$100,000 at least three to five measurable objectives are required by the Checkoff Evaluation Committee):*

- Conduct a minimum of three original human nutrition research studies focused on the new research roadmap pillars of original science and existing research assessments about beef's role in a healthy diet.
- Engage 40%, in 2022, of the top 100 Nutrition Science Influencers (as identified by historical data monitoring).
- Disseminate a minimum of two human nutrition research results in support of the new research roadmap posted on BeefResearch.org.

**Performance Efficiency Measures**

**Consumer and/or Producer Reach Goal: N/A**

**Consumer and/or Producer Engagement Goal: N/A**

**Key Opinion Leader Reach Goal: N/A**

**Key Opinion Leader Engagement Goal: N/A**

**LRP Initiatives Addressed by this Tactic**

Drive Growth in Beef Exports	Grow Consumer Trust in Beef Production	Develop & Implement Better Business Models & Value Distribution Across All Segments	Promote & Capitalize on the Multiple Advantage of Beef	Improve the Business & Political Climate of Beef	Safeguard & Cultivate Investment in Beef, Industry Research, Marketing & Innovation
<ul style="list-style-type: none"> <li><input type="checkbox"/> Drive adoption of traceability</li> <li><input type="checkbox"/> Identify &amp; address export customer needs and values</li> <li><input type="checkbox"/> Collaborate with targeted partners to promote U.S. beef in foreign markets</li> <li><input type="checkbox"/> Invest in research, marketing &amp; education programs</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Measure, document, improve &amp; communicate the net environment impact of beef production</li> <li>■ Educate medical, diet &amp; health professionals about beef &amp; beef production</li> <li><input type="checkbox"/> Align and collaborate with traditional &amp; nontraditional partners to tell the positive story of beef production</li> <li><input type="checkbox"/> Engage positively in the sustainable nutrition conversation</li> <li><input type="checkbox"/> Expand efforts in education the general public about BQA program &amp; it's impact on animal well-being</li> <li><input type="checkbox"/> Expand BQA program to include verification</li> <li><input type="checkbox"/> Develop a direct-to-consumer beef safety campaign</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use innovative methods &amp; technologies to value carcasses based on eating satisfaction &amp; red meat yield</li> </ul>	<ul style="list-style-type: none"> <li>■ Promote the role of beef in a health &amp; sustainable diet</li> <li><input type="checkbox"/> Implement a marketing campaign that communicates beef's advantage compared to alternative proteins</li> <li><input type="checkbox"/> Develop targeted marketing programs focused on the highest opportunity market segments</li> <li><input type="checkbox"/> Cultivate collaborative promotion partnerships</li> <li><input type="checkbox"/> Promote innovative online marketing, packaging &amp; shipping solutions to enable the direct marketing of beef</li> <li><input type="checkbox"/> Engage consumers in a memorable beef eating experience</li> <li><input type="checkbox"/> Develop a more interactive &amp; exciting beef purchasing experience</li> <li><input type="checkbox"/> Promote underutilized beef cuts &amp; new variety meat product</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Demonstrate beef's positive sustainability message &amp; key role in regenerative agriculture</li> <li><input type="checkbox"/> Defend beef's product identity</li> <li>■ Ensure beef's inclusion in dietary recommendations</li> <li><input type="checkbox"/> Drive continuous improvement in food safety</li> <li><input type="checkbox"/> Develop crisis management plans</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Attract innovative &amp; intellectual capital into the beef industry</li> <li><input type="checkbox"/> Encourage the cooperation &amp; collaboration of existing industry advisory committees to identify &amp; prioritize research efforts</li> </ul>

**Committee(s) to Score this Tactic**

Consumer Trust	Domestic Marketing	International Marketing	Nutrition & Health	Safety & Product Innovation	Stakeholder Engagement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Tactic C**

**Tactic Name:** Product Quality Research and Culinary Technical Expertise

**Tactic Description:**

NCBA, on behalf of the Beef Checkoff, leads the primary product quality 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. This tactic also delivers peer-reviewed meat science research to document how taste develops in beef products and demonstrates methods for taste consistency with the goal of generating more repeat beef purchases.

In 2022, 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 help select research projects for funding that align with the program's current research roadmap.

Research findings will be shared via public conferences (i.e., the annual Reciprocal Meats Conference), written materials, visual tools and/or in-person meetings. Research results and insights, as well as technical expertise will be delivered to multiple audiences including academic scientists and scientific organizations (i.e., the American Meat Science Association), and technical experts or industry scientists at supply chain partners such as packers, processors, foodservice and retail, other Checkoff programs (i.e., consumer marketing), state beef council partners, and allied industry stakeholders and influencers (i.e., USMEF). This ensures 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.

NCBA, on behalf of the Beef Checkoff, also provides culinary support for other tactics, industry partners and state beef council programs. In 2022, this program will extend beef cookery expertise to support numerous Checkoff audiences in the execution of their programming to ensure beef recipes and related content cast beef as the top protein.

Taste is beef's top demand driver and the top reason consumers chose beef. To protect this most important product attribute, this tactic directly addresses the demand drivers of eating experience, convenience/versatility and price.



**Measurable Objectives**

*(For tactics \$100,000 or less two measurable objectives are required and for tactics over \$100,000 at least three to five measurable objectives are required by the Checkoff Evaluation Committee):*

- Conduct a minimum of four original scientific research projects focused on the pillars of the new research roadmap and improving product quality and taste consistency.
- Showcase product quality research program content through a minimum of two avenues including scientific conferences, peer review articles, and the [www.beefresearch.org](http://www.beefresearch.org) website.
- Disseminate a minimum of five product quality research results in support of the new research roadmap posted on [BeefResearch.org](http://BeefResearch.org).
- Provide culinary expertise to other national or state partner programs that showcase beef's unique attributes through eight interactions.

**Performance Efficiency Measures**

**Consumer and/or Producer Reach Goal: N/A**

**Consumer and/or Producer Engagement Goal: N/A**

**Key Opinion Leader Reach Goal: N/A**

**Key Opinion Leader Engagement Goal: N/A**

**LRP Initiatives Addressed by this Tactic**

Drive Growth in Beef Exports	Grow Consumer Trust in Beef Production	Develop & Implement Better Business Models & Value Distribution Across All Segments	Promote & Capitalize on the Multiple Advantage of Beef	Improve the Business & Political Climate of Beef	Safeguard & Cultivate Investment in Beef, Industry Research, Marketing & Innovation
<ul style="list-style-type: none"> <li><input type="checkbox"/> Drive adoption of traceability</li> <li><input type="checkbox"/> Identify &amp; address export customer needs and values</li> <li><input type="checkbox"/> Collaborate with targeted partners to promote U.S. beef in foreign markets</li> <li><input type="checkbox"/> Invest in research, marketing &amp; education programs</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Measure, document, improve &amp; communicate the net environment impact of beef production</li> <li><input type="checkbox"/> Educate medical, diet &amp; health professionals about beef &amp; beef production</li> <li><input type="checkbox"/> Align and collaborate with traditional &amp; nontraditional partners to tell the positive story of beef production</li> <li><input type="checkbox"/> Engage positively in the sustainable nutrition conversation</li> <li><input type="checkbox"/> Expand efforts in education the general public about BQA program &amp; it's impact on animal well-being</li> <li><input type="checkbox"/> Expand BQA program to include verification</li> <li><input type="checkbox"/> Develop a direct-to-consumer beef safety campaign</li> </ul>	<ul style="list-style-type: none"> <li>■ Use innovative methods &amp; technologies to value carcasses based on eating satisfaction &amp; red meat yield</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Promote the role of beef in a health &amp; sustainable diet</li> <li>■ Implement a marketing campaign that communicates beef's advantage compared to alternative proteins</li> <li><input type="checkbox"/> Develop targeted marketing programs focused on the highest opportunity market segments</li> <li><input type="checkbox"/> Cultivate collaborative promotion partnerships</li> <li><input type="checkbox"/> Promote innovative online marketing, packaging &amp; shipping solutions to enable the direct marketing of beef</li> <li>■ Engage consumers in a memorable beef eating experience</li> <li><input type="checkbox"/> Develop a more interactive &amp; exciting beef purchasing experience</li> <li>■ Promote underutilized beef cuts &amp; new variety meat product</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Demonstrate beef's positive sustainability message &amp; key role in regenerative agriculture</li> <li><input type="checkbox"/> Defend beef's product identity</li> <li><input type="checkbox"/> Ensure beef's inclusion in dietary recommendations</li> <li><input type="checkbox"/> Drive continuous improvement in food safety</li> <li><input type="checkbox"/> Develop crisis management plans</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Attract innovative &amp; intellectual capital into the beef industry</li> <li><input type="checkbox"/> Encourage the cooperation &amp; collaboration of existing industry advisory committees to identify &amp; prioritize research efforts</li> </ul>

**Committee(s) to Score this Tactic**

Consumer Trust	Domestic Marketing	International Marketing	Nutrition & Health	Safety & Product Innovation	Stakeholder Engagement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Tactic D**

**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 addresses all three areas of sustainability as identified by the beef industry: environment, social and economic.

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 (thought leaders, influencers and consumer media).

Previous completion of the foundational U.S. beef sustainability life cycle assessment (LCA) measured the beef industry's improvements on beef's 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. 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 sustainability assessments. It is critical for the beef industry to better understand these complex topics to maintain consumer confidence in beef production.

With the new LRP, a new research roadmap has been developed with an industry expert advisory group. The roadmap focuses on all three pillars of sustainability: environmental, economic and social sustainability. In 2022, research will be funded to measure improvements in beef sustainability in one or more of the three sustainability pillars. This includes collecting data to benchmark and demonstrate beef's unique positive contribution to society by investigating the impacts of cattle across the three pillars. Scientific outreach will focus on leveraging research results and content to key audiences, including through development of technical presentations and educational tools with other tactics. Strategic planning sessions will be conducted as needed to

refine beef sustainability research gaps and roadmap. This tactic directly addresses the demand driver of how food is raised/grown that influence consumption.

**Measurable Objectives**

*(For tactics \$100,000 or less two measurable objectives are required and for tactics over \$100,000 at least three to five measurable objectives are required by the Checkoff Evaluation Committee):*

- Conduct a minimum of three original scientific research projects focused on the three pillars of environmental, social and economic sustainability as noted in the new sustainability roadmap
- Conduct a minimum of eight individual presentations to a variety of audiences (i.e., scientific community, thought leaders and influencers, retail or foodservice, etc.) on how beef is sustainably raised today, leveraging beef sustainability research insights.
- Disseminate a minimum of five sustainability research results in support of the new research roadmap posted on BeefResearch.org.

**Performance Efficiency Measures**

**Consumer and/or Producer Reach Goal: N/A**

**Consumer and/or Producer Engagement Goal: N/A**

**Key Opinion Leader Reach Goal: N/A**

**Key Opinion Leader Engagement Goal: N/A**

**LRP Initiatives Addressed by this Tactic**

Drive Growth in Beef Exports	Grow Consumer Trust in Beef Production	Develop & Implement Better Business Models & Value Distribution Across All Segments	Promote & Capitalize on the Multiple Advantage of Beef	Improve the Business & Political Climate of Beef	Safeguard & Cultivate Investment in Beef, Industry Research, Marketing & Innovation
<ul style="list-style-type: none"> <li><input type="checkbox"/> Drive adoption of traceability</li> <li><input type="checkbox"/> Identify &amp; address export customer needs and values</li> <li><input type="checkbox"/> Collaborate with targeted partners to promote U.S. beef in foreign markets</li> <li><input type="checkbox"/> Invest in research, marketing &amp; education programs</li> </ul>	<ul style="list-style-type: none"> <li>■ Measure, document, improve &amp; communicate the net environment impact of beef production</li> <li><input type="checkbox"/> Educate medical, diet &amp; health professionals about beef &amp; beef production</li> <li><input type="checkbox"/> Align and collaborate with traditional &amp; nontraditional partners to tell the positive story of beef production</li> <li><input type="checkbox"/> Engage positively in the sustainable nutrition conversation</li> <li><input type="checkbox"/> Expand efforts in education the general public about BQA program &amp; it's impact on animal well-being</li> <li><input type="checkbox"/> Expand BQA program to include verification</li> <li><input type="checkbox"/> Develop a direct-to-consumer beef safety campaign</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use innovative methods &amp; technologies to value carcasses based on eating satisfaction &amp; red meat yield</li> </ul>	<ul style="list-style-type: none"> <li>■ Promote the role of beef in a health &amp; sustainable diet</li> <li><input type="checkbox"/> Implement a marketing campaign that communicates beef's advantage compared to alternative proteins</li> <li><input type="checkbox"/> Develop targeted marketing programs focused on the highest opportunity market segments</li> <li><input type="checkbox"/> Cultivate collaborative promotion partnerships</li> <li><input type="checkbox"/> Promote innovative online marketing, packaging &amp; shipping solutions to enable the direct marketing of beef</li> <li><input type="checkbox"/> Engage consumers in a memorable beef eating experience</li> <li><input type="checkbox"/> Develop a more interactive &amp; exciting beef purchasing experience</li> <li><input type="checkbox"/> Promote underutilized beef cuts &amp; new variety meat product</li> </ul>	<ul style="list-style-type: none"> <li>■ Demonstrate beef's positive sustainability message &amp; key role in regenerative agriculture</li> <li><input type="checkbox"/> Defend beef's product identity</li> <li><input type="checkbox"/> Ensure beef's inclusion in dietary recommendations</li> <li><input type="checkbox"/> Drive continuous improvement in food safety</li> <li><input type="checkbox"/> Develop crisis management plans</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Attract innovative &amp; intellectual capital into the beef industry</li> <li><input type="checkbox"/> Encourage the cooperation &amp; collaboration of existing industry advisory committees to identify &amp; prioritize research efforts</li> </ul>

**Committee(s) to Score this Tactic**

Consumer Trust	Domestic Marketing	International Marketing	Nutrition & Health	Safety & Product Innovation	Stakeholder Engagement
■	□	□	□	□	□

**Tactic E**

**Tactic Name:** Foundational Market Research

**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. Foundational Market Research 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 and driving demand for 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 demand, must be fact-based to ensure industry resources are applied as efficiently as possible. Industry stakeholders, including state and national Checkoff programs, rely on this Beef Checkoff-funded foundational research 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 information on consumer attitudes, perceptions, usage, beef retail and foodservice data for the industry. Examples of research in this tactic include the Checkoff-funded consumer beef tracker that continues to build on years of insight on consumer attitudes and usage behavior. The tracker is an ongoing survey of 1500 consumers a month that allows for data summaries, available as needed, to support Checkoff programs and provide key demand-driving insights. Additionally, channel intelligence data (retail scanner data and foodservice operator data) will continue to be licensed, analyzed, and disseminated. Other research falling in this area includes state dashboards, providing state partners a local read at key consumers' questions, and segmentation targeting persona updates. This tactic

directly addresses all demand drivers; besides being the tactic that demand drivers are derived and updated from.

**Measurable Objectives**

*(For tactics \$100,000 or less two measurable objectives are required and for tactics over \$100,000 at least three to five measurable objectives are required by the Checkoff Evaluation Committee):*

- Share foundational market research 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.
- Disseminate a minimum of six results to industry partners and stakeholders.
- Convey industry thought leadership by writing six summaries that that involve consumer insights, retail sales and foodservice trends for posting on properties such as beefitswhatsfordinner.com and beefresearch.org
- Average eight channel or stakeholder data inquiries per month to broaden the reach of Checkoff-funded insights and support research and communications programs. Responses contingent on requests.

**Performance Efficiency Measures**

**Consumer and/or Producer Reach Goal: N/A**

**Consumer and/or Producer Engagement Goal: N/A**

**Key Opinion Leader Reach Goal: N/A**

**Key Opinion Leader Engagement Goal: N/A**

**LRP Initiatives Addressed by this Tactic**

Drive Growth in Beef Exports	Grow Consumer Trust in Beef Production	Develop & Implement Better Business Models & Value Distribution Across All Segments	Promote & Capitalize on the Multiple Advantage of Beef	Improve the Business & Political Climate of Beef	Safeguard & Cultivate Investment in Beef, Industry Research, Marketing & Innovation
<ul style="list-style-type: none"> <li><input type="checkbox"/> Drive adoption of traceability</li> <li><input type="checkbox"/> Identify &amp; address export customer needs and values</li> <li><input type="checkbox"/> Collaborate with targeted partners to promote U.S. beef in foreign markets</li> <li><input type="checkbox"/> Invest in research, marketing &amp; education programs</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Measure, document, improve &amp; communicate the net environment impact of beef production</li> <li><input type="checkbox"/> Educate medical, diet &amp; health professionals about beef &amp; beef production</li> <li><input type="checkbox"/> Align and collaborate with traditional &amp; nontraditional partners to tell the positive story of beef production</li> <li><input type="checkbox"/> Engage positively in the sustainable nutrition conversation</li> <li><input type="checkbox"/> Expand efforts in education the general public about BQA program &amp; it's impact on animal well-being</li> <li><input type="checkbox"/> Expand BQA program to include verification</li> <li><input type="checkbox"/> Develop a direct-to-consumer beef safety campaign</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use innovative methods &amp; technologies to value carcasses based on eating satisfaction &amp; red meat yield</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Promote the role of beef in a health &amp; sustainable diet</li> <li>■ Implement a marketing campaign that communicates beef's advantage compared to alternative proteins</li> <li>■ Develop targeted marketing programs focused on the highest opportunity market segments</li> <li>■ Cultivate collaborative promotion partnerships</li> <li><input type="checkbox"/> Promote innovative online marketing, packaging &amp; shipping solutions to enable the direct marketing of beef</li> <li>■ Engage consumers in a memorable beef eating experience</li> <li>■ Develop a more interactive &amp; exciting beef purchasing experience</li> <li><input type="checkbox"/> Promote underutilized beef cuts &amp; new variety meat product</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Demonstrate beef's positive sustainability message &amp; key role in regenerative agriculture</li> <li><input type="checkbox"/> Defend beef's product identity</li> <li><input type="checkbox"/> Ensure beef's inclusion in dietary recommendations</li> <li><input type="checkbox"/> Drive continuous improvement in food safety</li> <li><input type="checkbox"/> Develop crisis management plans</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Attract innovative &amp; intellectual capital into the beef industry</li> <li><input type="checkbox"/> Encourage the cooperation &amp; collaboration of existing industry advisory committees to identify &amp; prioritize research efforts</li> </ul>



**Committee(s) to Score this Tactic**

Consumer Trust	Domestic Marketing	International Marketing	Nutrition & Health	Safety & Product Innovation	Stakeholder Engagement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Tactic F**

**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 Sustainability campaign launched in Spring of 2021. 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 FY 2022 directly addresses all demand drivers influencing consumption, value and preference:

- Nutrition, Safety, Quality and Sustainability Market Research – Checkoff-funded studies in this area directly support our technical research departments and their research roadmaps that drive demand for beef. Previous examples include deep dives into beef in in the early years and a consumer deep dive on sustainability.
- Marketing Communication – Checkoff-funded studies in this area support the development and execution of Checkoff-funded promotional campaigns that are meant to support the primary drivers of beef. Previous examples include several rounds of concept and content testing for the holiday, summer grilling, and sustainability campaigns.
- Consumer Trends with Beef – Checkoff-funded studies in this area directly support several long-range plan initiatives that support the primary drivers of beef. These projects allow us to uncover changing consumer behaviors. Examples of past projects include consumer stocking-up behavior, e-commerce and beef, and consumer comfort with holiday activities.

**Measurable Objectives**

*(For tactics \$100,000 or less two measurable objectives are required and for tactics over \$100,000 at least three to five measurable objectives are required by the Checkoff Evaluation Committee):*

- Conduct a minimum of one study that supports the roadmaps of the Beef Checkoff's technical research departments (e.g., message testing, topic exploration etc.). Disseminate insights that support beef demand with Checkoff programs and industry stakeholders, including state beef councils.
- Conduct research on a minimum of five marketing communication concepts/content pieces (e.g., message testing, video treatments, social posts, etc.). Disseminate insights that support beef demand with Checkoff programs and industry stakeholders, including state beef councils.
- Conduct a minimum of one study that supports changing consumer behavior as it relates to beef, e.g., shopping experience, cooking trends, foodservice experiences, etc.). Disseminate insights that support beef demand with Checkoff programs and industry stakeholders, including state beef councils.

**Performance Efficiency Measures**

**Consumer and/or Producer Reach Goal: N/A**

**Consumer and/or Producer Engagement Goal: N/A**

**Key Opinion Leader Reach Goal: N/A**

**Key Opinion Leader Engagement Goal: N/A**

**LRP Initiatives Addressed by this Tactic**

Drive Growth in Beef Exports	Grow Consumer Trust in Beef Production	Develop & Implement Better Business Models & Value Distribution Across All Segments	Promote & Capitalize on the Multiple Advantage of Beef	Improve the Business & Political Climate of Beef	Safeguard & Cultivate Investment in Beef, Industry Research, Marketing & Innovation
<ul style="list-style-type: none"> <li><input type="checkbox"/> Drive adoption of traceability</li> <li><input type="checkbox"/> Identify &amp; address export customer needs and values</li> <li><input type="checkbox"/> Collaborate with targeted partners to promote U.S. beef in foreign markets</li> <li><input type="checkbox"/> Invest in research, marketing &amp; education programs</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Measure, document, improve &amp; communicate the net environment impact of beef production</li> <li><input type="checkbox"/> Educate medical, diet &amp; health professionals about beef &amp; beef production</li> <li><input type="checkbox"/> Align and collaborate with traditional &amp; nontraditional partners to tell the positive story of beef production</li> <li><input type="checkbox"/> Engage positively in the sustainable nutrition conversation</li> <li><input type="checkbox"/> Expand efforts in education the general public about BQA program &amp; it's impact on animal well-being</li> <li><input type="checkbox"/> Expand BQA program to include verification</li> <li><input type="checkbox"/> Develop a direct-to-consumer beef safety campaign</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Use innovative methods &amp; technologies to value carcasses based on eating satisfaction &amp; red meat yield</li> </ul>	<ul style="list-style-type: none"> <li>■ Promote the role of beef in a health &amp; sustainable diet</li> <li>■ Implement a marketing campaign that communicates beef's advantage compared to alternative proteins</li> <li>■ Develop targeted marketing programs focused on the highest opportunity market segments</li> <li><input type="checkbox"/> Cultivate collaborative promotion partnerships</li> <li>■ Promote innovative online marketing, packaging &amp; shipping solutions to enable the direct marketing of beef</li> <li>■ Engage consumers in a memorable beef eating experience</li> <li>■ Develop a more interactive &amp; exciting beef purchasing experience</li> <li>■ Promote underutilized beef cuts &amp; new variety meat product</li> </ul>	<ul style="list-style-type: none"> <li>■ Demonstrate beef's positive sustainability message &amp; key role in regenerative agriculture</li> <li><input type="checkbox"/> Defend beef's product identity</li> <li>■ Ensure beef's inclusion in dietary recommendations</li> <li>■ Drive continuous improvement in food safety</li> <li><input type="checkbox"/> Develop crisis management plans</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Attract innovative &amp; intellectual capital into the beef industry</li> <li><input type="checkbox"/> Encourage the cooperation &amp; collaboration of existing industry advisory committees to identify &amp; prioritize research efforts</li> </ul>

**Committee(s) to Score this Tactic**

Consumer Trust	Domestic Marketing	International Marketing	Nutrition & Health	Safety & Product Innovation	Stakeholder Engagement
<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 2021 approved AR:**

Product Quality Research and Technical Services and Culinary Expertise tactics from FY 2021 have been combined in this FY 2022 AR to achieve resource efficiencies.

Additionally, Channel Intelligence and Foundational Market Research tactics have been combined. Channel Intelligence has merged with foundational market research to help clear up confusion that we have heard from committee members in the past. The retail and foodservice syndicated data received in channel intelligence is foundational to tracking and understanding what is happening with beef. By combining this with the foundational market research, which focused on keeping a pulse on consumer attitudes, and usage of the protein landscape, we hope to clear up this confusion.

**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 may be used to complete research. 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/or research roadmap priorities.

Dynata Survey Platforms via Critical Mix and Simplify, Qualboard and Caplena have solutions for consumer survey research that provide for more cost effective and efficient surveying and analyzing. Work related to consumer tracking, sustainability and segmentation 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. NPD will continue to provide insights into the foodservice channel. They also provide a suite of strategic services and proprietary databases by foundational market research to explore and act on a variety of foodservice insights. NielsenIQ 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 vendors/agencies be competitively bid?  
*If not, why not?***

No. 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 Beef Promotion Operating Committee (BPOC):**

The programs in this AR builds on, but do not duplicate work form previous ARs and is leveraged by 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, Neilson 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.

**5. If applicable, explain how this AR can be extended by State Beef Councils.**

Key insights from this and previous Research ARs are utilized by State Beef Councils as the foundation for programming in other budget categories. Insights are shared upon request. Where State Beef Councils conduct research, expertise and insights are shared as appropriate.

# DETAILED BUDGET SUMMARY

AR# 2211-R

**CBB/BPOC Funding Request:**

Committee Name	Tactic	Tactic Name	Funding Source	Direct	Impl.	Total
<i>Safety &amp; Product Innovation</i>	A	Safety Research and Scientific Affairs	BPOC	\$ 600,000	\$ 346,700	\$ 946,700
<i>Nutrition and Health</i>	B	Nutrition Research and Scientific Affairs	BPOC	\$ 1,600,000	\$ 888,400	\$ 2,488,400
<i>Safety &amp; Product Innovation</i>	C	Product Research and Culinary Expertise	BPOC	\$ 528,900	\$ 464,300	\$ 993,200
<i>Consumer Trust</i>	D	Sustainability Research and Scientific Affairs	BPOC	\$ 650,000	\$ 647,600	\$ 1,297,600
<i>Domestic Marketing</i>	E	Foundational Market Research	BPOC	\$ 575,000	\$ 797,700	\$ 1,372,700
<i>Domestic Marketing</i>	F	Key Topic Market Research	BPOC	\$ 400,000	\$ 601,400	\$ 1,001,400
<b>AR Totals</b>				\$ 4,353,900	\$ 3,746,100	\$ 8,100,000

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

Committee	Tactic	Tactic Name	Funding Source	Direct	Impl.	Total
<i>Safety &amp; Product Innovation</i>	A	Safety Research and Scientific Affairs	Federation/ Other Funding			\$ -
<i>Nutrition and Health</i>	B	Nutrition Research and Scientific Affairs	Federation/ Other Funding			\$ -
<i>Safety &amp; Product Innovation</i>	C	Product Research and Culinary Expertise	Federation/ Other Funding			\$ -
<i>Consumer Trust</i>	D	Sustainability Research and Scientific Affairs	Federation/ Other Funding			\$ -
<i>Domestic Marketing</i>	E	Foundational Market Research	Federation/ Other Funding			\$ -
<i>Domestic Marketing</i>	F	Key Topic Market Research	Federation/ Other Funding			\$ -
<b>AR Totals</b>				\$ -	\$ -	\$ -

*\*The Federation funds are placeholders only and are 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 FY2022. For FY 2022, if the threat of legal challenges does not impact State Beef Council investments, approximately \$4-5 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:**

**AR# 2211-R**

FY 2021 Approved Budgets	Total Approved Budgets		Total Actual Expenses		Total	
	CBB/BPOC	FSBCs	FY 2020	FY 2019	FY 2020	FY 2019
AR Totals	\$ 8,250,764	\$ 1,500,000	\$ 9,204,603	\$ 9,684,000	\$ 7,194,328	\$ 8,139,891

FY 2021 Actual Expenses (through June 30, 2021)	Total Approved Budgets		Total Actual Expenses		Total	
	CBB/BPOC	FSBCs	FY 2020	FY 2019	FY 2020	FY 2019
AR Totals	\$ 3,355,380		\$ 9,204,603	\$ 9,684,000	\$ 7,194,328	\$ 8,139,891
AR Totals - Federation of SBCs	\$ 12,551		\$ -	\$ -	\$ 645,631	\$ 1,045,058

\*NOTE: Financials are through Jun 30, 2021 are not yet available and the above are the most current financials available in advance of the BPOC Meeting in Sept

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

	Total Approved Budgets			Total Actual Expenses		
	FY 2020	FY 2019	FY 2018	FY 2020	FY 2019	FY 2018
AR Totals - BPOC	\$ 9,204,603	\$ 9,684,000	\$ 9,667,200	\$ 7,194,328	\$ 8,139,891	\$ 9,112,427
AR Totals - Federation of SBCs	\$ -	\$ -	\$ -	\$ 645,631	\$ 1,045,058	\$ 1,292,766