AUTHORIZATION REQUEST FOR FY 2023

CBB Budget Category: Research

Name of Contractor: United States Cattlemen's Association

Name of Organization Subcontracting: Kansas State University

Start Date: 10/1/2022

End Date: 9/30/2025

AR OVERVIEW

AR Purpose and Description:

The Meat Demand Monitor (MDM) project was launched in February 2020 reflecting joint funding support by the beef and pork checkoff programs. The MDM project has been a huge success and continues to grow in impact and recognition. This AR is to support three additional years of beef checkoff support enabling continuation and expansion of the MDM project.

The MDM project can be summarized as an ongoing, monthly U.S. consumer survey based effort that notably enriches understanding of domestic meat demand. Surveys of over 2,000 residents are completed each month focused on retail (grocery store) and food service (restaurant) market channels. This provides a novel, timely, and accessible information source that is not otherwise available. As witnessed by notable interest in MDM outputs (described below), the broader MDM project is now widely-recognized and increasingly contributes to understanding of domestic meat demand and related consumer issues. This AR is designed to support continuation of the MDM project in partnership with the pork checkoff.

ADDITIONAL BACKGROUND ON THE MEAT DEMAND MONITOR (MDM)

Prior to the Meat Demand Monitor project being initiated, publicly available data regarding consumer meat demand was only available in very aggregated levels and insufficient to effectively guide sound industry decision-making. The data which did exist was more focused on the retail (grocery store) segment while food service (restaurants) remained an area of growth, critical importance, and comparative ambiguity. Meanwhile public funding for data gathering and reporting has persistently been stagnant increasing need and value of new data and information efforts.

In launching the MDM project, this situation was improved in implementing a new, monthly meat demand monitoring effort that has notably enriched understanding of U.S. consumer meat demand. Further details regarding procedures, industry benefits, and

the knowledge that would be generated are provided in the following paragraphs to reinforce the success and impacts to-date noted in prior pages above.

Procedural Overview

The project is centrally comprised of two survey-based data and information gathering efforts to be completed concurrently each month.

1. A nationally representative online survey is conducted of at least 1,000 U.S. residents with a retail, grocery-store focus on meat demand. This is a continuation, with some adjustments to be further specific to meat issues, of the Food Demand Survey (FooDS) Jayson Lusk initiated in May 2013 and ended in May 2018. There has been intentional overlap with the past FooDS survey questionnaire and Meat Demand Monitor surveys.

2. A nationally representative online survey will be conducted of at least 1,000 U.S. residents with a food service, restaurant focus on meat demand. This parallel survey would focus on meal selections at food service establishments. To-date the MDM has had a focus on demand assessment in the dinner meal's entrée selection. In the future if feasible, parallel assessment specific to breakfast or lunch meals may be added.

Beyond base meat demand assessment, these surveys contain a multitude of additional questions that provide a rich information source in understanding U.S. consumer demand, preferences, and behavior. The figures shown above from the May 2022 MDM summary report provide visual examples of this information.

Monthly Data and Information Generated

1. Quantify consumer willingness to pay (WTP) for meat in retail settings.

2. Quantify consumer WTP for meat in restaurant settings. Assessment specific to dinner meal decisions has occurred to-date. In the future, additional assessment of breakfast of lunch meal decisions may be added if feasible.

3. Quantify relative importance of 12 meat values (Freshness, Taste, Price, Safety, Convenience, Nutrition, Health, Origin/Traceability, Hormone-Free/Antibiotic-Free, Animal Welfare, Environment, and Appearance).

4. Quantify level of concern on a series of health hazards (e.g. Mad Cow Disease, BSE, Growth Hormones use in Livestock, E.coli, Salmonella, Genetically Modified Foods, Swine Flu, Bird Flu, Greenhouse Gas Emissions from Livestock) in consumed meat.

5. Quantify the frequency and location of beef, pork, and chicken consumption in the past week.

    a. Separately for the number of meals consumed at-home vs. away from home.

    b. At-home information will be further delineated between those meals purchased in-person and prepared in-home, delivered by others and prepared in-home, and delivered and prepared by others ready to eat.

    c. Away-from-home information will be further delineated by meal (breakfast, lunch, and dinner).

6. Provide summary statistics and base analysis on "hot topic" ad hoc questions asked each month. Questions of elevated interest that arise yet are not part of the regular, recurring survey question set may be included each month as coordinated by Tonsor.

Respondent level survey responses for regularly recurring questions continue to be posted online and publicly available. Each month an Executive Summary type report continues to publicly posted (following approval by checkoff and USDA authorities) to widely disseminate main findings and trends relative to previously collected information.

FY23 CBB/BPOC Funding Request		
Direct Costs	**Implementation**	**Total**
$426,000	$24,000	$450,000

Beef Industry Long Range Plan (LRP) Core Strategies Addressed by this AR
(Check all that apply)

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
☐	■	■	■	■	☐

PROGRAM INFORMATION FOR THIS AR

Tactic A

Tactic Name: Meat Demand Monitor

Tactic Description
The Meat Demand Monitor (MDM) has become a one-stop location for detailed meat demand trends and ongoing, data-driven research that is timely, valuable, and not available elsewhere.

In this AR, both producers and consumers are directly involved. Consumers are involved first as research participants in ongoing survey-based data collection as well as readers and listeners to media that picks up MDM information. Producers are involved as direct stakeholders interested in research-based findings and also as readers and listeners in agricultural-oriented media that increasingly is interested in MDM information or as attendees at educational, Extension events.

All data originating in this project, underlying survey instruments, and associated documentation are available online at https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data.

The full transparency of MDM project procedures, coupled with ongoing success in meeting past objectives and having real-impact as evidenced above, lends confidence to the objectives of this AR also being successfully met.

Citations:
Some examples of peer-reviewed research highlights include:

- 2022 *Meat Science* article titled "U.S. Perspective: Meat Demand Outdoes Meat Avoidance" uses MDM data to document strong domestic beef and pork demand, how retail and food service meat demand differed early in the pandemic, and how the majority of residents self-declare as regular meat consumers (vs. Vegan, Vegetarian or Flexitarian).

- 2022 *Applied Economics Perspective and Policy* article titled "Benchmarking U.S. Consumption and Perceptions of Beef and Plant-Based Proteins" uses MDM data on inclusion of protein in prior day meals to identify socio-economic factors most aligned with those who eat beef (50%), plant-based proteins (3%), both beef and plant-based proteins (4%), or neither beef nor plant-based proteins (44%). 2021 *Animals* article titled "Meat Demand Monitor during COVID-19" uses MDM data to provide a timely assessment of how the pandemic impacted domestic meat demand. This article also provided key insight on how meat demand varies with consumer confidence, household income level, and market channel (retail vs. food service).

Given the building nature of information available from continuing systematic survey data collection over multiple years, and Dr. Tonsor's roles at Kansas State University, the MDM project is expected to continue resulting in novel and timely peer-reviewed research outputs that extend understanding of domestic meat demand.

Some examples of dissemination highlights include:

- As of June 14, 2022 there have been over 15,000 page views of the MDM webpage on AgManager.info

- This covers 28 base monthly reports, 4 multi-month trends reports, and 3 special reports focused on pandemic impacts.

- MDM information is now appearing monthly in interviews Dr. Tonsor has with Mike Pearson, host of Agriculture of America.

- MDM insights have been incorporated into other high-profile interviews including U.S. Farm Report, RFD TV, AgWeb, Drovers, Feedlot Magazine, Cattle Current Daily, Feedstuffs, VOX, CAST, MarketWatch, Supermarket News, and USDA's Agricultural Outlook Forum.

- MDM information has been used in both state- and federal-level testimony.

- USDA approved tweets are made each month following posting of new reports. For a recent example, between May 29 and June 2, 2022 there were 13 tweets made using #MDM (to mark project tweets) with a total of 4,461 impressions.

Given the building nature of information available from continuing systematic survey data collection over multiple years, and the associated growth in expectations for said information to be available, the MDM project is expected to continue resulting in timely and influential media reach disseminating main findings and implications.

Measurable Objectives
For tactics requesting $100,000 or less of CBB/BPOC funding, two measurable objectives are required. For tactics requesting over $100,000 of CBB/BPOC funding, at least three to five measurable objectives are required.

1. Continuation of the Meat Demand Monitor project as a one-stop location for U.S. meat demand trends and assessment that is timely, informative, and accessible to all interested parties.

   The first objective will be met by building upon success to-date and continuing with existing survey protocols supporting month-over-month and year-over-year comparisons.

2. Ongoing creation and posting of base monthly reports and less frequent, deeper-assessments documenting the status of U.S. meat demand reflected in MDM information.

   The second objective will be met by continuing with current best operating practices of having reports typically generated within one week of data collection ceasing and prompt dissemination of reports occurring upon approval by checkoff and USDA authorities.

3. Wide and influential dissemination of main findings and implications.

   The third objective will be met by continuing to release approved Tweets and ongoing collaboration with multiple, high-impact media partners (see prior section above) interested in MDM information. Furthermore, additional in-person dissemination is anticipated as we continue to move "post pandemic."

Performance Efficiency Measures
A tactic can have up to three identified target audiences for the "General Target Audience" and "Key opinion Leaders" categories.

General Target Audience:
- Consumer Reach Goal: 24,000
- Consumer Engagement Goal: 2,400

- Producers Reach Goal: 8,000
- Producer Engagement Goal: 800

Key Opinion Leaders:
- Producer Media Reach Goal: 106,000
- Producer Media Engagement Goal: 10,600

**In the online system (OSCAR), the electronic version of 2312-R has additional information related to this AR and tactic titled "MDM Supporting Figures", which attached in the "Documents" section.

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
☐ Drive the adoption of traceability for all U.S. cattle to help promote U.S. beef through (verified) value-added programs, while protecting the health & well-being of cattle and our markets from the effects of contagious diseases	☐ Measure, document, improve & communicate the net climate and environmental impact of beef production	☐ Use innovative methods & technologies to value carcasses based on eating satisfaction & red meat yield	■ Promote the role of beef in a health & sustainable diet	☐ Demonstrate beef's positive sustainability message & key role in regenerative agriculture	☐ Attract innovation & intellectual capital & cultivate the next generation of talent into the beef industry
☐ Identify & address export customer needs & values	☐ Educate medical, diet & health professionals about beef & beef production	☐ Develop production/ processing/ marketing systems that result in more equitable margin distribution	■ Implement a marketing campaign that communicates beef's advantage compared to alternative proteins	■ Defend beef's product identity	☐ Encourage the cooperation & collaboration of existing industry advisory committees to identify & prioritize research efforts
☐ Collaborate with targeted partners to promote U.S. beef in foreign markets	■ Align & collaborate with traditional & nontraditional partners to tell the positive story of beef production	☐ Explore business models and risk management tools that result in more sustainable producer profit opportunities	☐ Develop targeted marketing programs focused on the highest opportunity market segments	☐ Ensure beef's inclusion in dietary recommendations	☐ Increase industry funds for beef marketing, promotion, and research
☐ Invest in research, marketing & education programs	☐ Engage positively in the sustainable nutrition conversation		☐ Cultivate collaborative promotion partnerships	☐ Drive continuous improvement in food safety	
	☐ Intensify efforts in educating consumers as well as supply chain decision makers about the benefits of animal care programs like BQA & their impact on animal well-being		☐ Promote innovative online marketing, packaging & shipping solutions to enable the direct marketing of beef	☐ Develop crisis management plans	
	☐ Expand BQA program to include verification		☐ Engage consumers in a memorable beef eating experience		
	☐ Develop a direct-to-consumer beef safety campaign		☐ Develop a more interactive & exciting beef purchasing experience		
			☐ Promote underutilized beef cuts & new variety meat products		

Committee(s) to Score this Tactic

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

SUPPLEMENTAL INFORMATION FOR THIS AR

1. **Please explain changes from the FY 2022 approved AR:**
   The MDM project was originally launched with Beef Checkoff support in 2020 with three years of support. There were not corresponding ARs for FY21 or FY22 and here for FY23 continuation is being presented. The multi-year aspect of this AR is essential to sustain the ongoing data-collection, analysis, and dissemination foundation of the MDM project.

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

   As the project's sub-contractor, Kansas State University designs and executes ongoing consumer surveys to gather primary data in the MDM effort. These surveys are distributed by Dynata (formerly SSI) using their Samplify dashboard. Subsequently data analysis and report creation is overseen by Dr. Glynn Tonsor, Kansas State University. Dr. Tonsor has collaborated with fellow trained economists and graduate students in generating multiple research publications beyond base reports posted regularly to K-State's AgManager.info website.

3. **Will all work with vendors/agencies be competitively bid?**

   KSU will continue to work with Dynata consistent with the successful relationship in place as the MDM project remains ongoing. A core intent of this AR is to enable a seamless continuation, and expansion, of the MDM project.

4. **Please list any relationships between this AR and projects previously funded by the Beef Promotion Operating Committee (BPOC).**

   As noted above, the MDM project was launched in 2020 following joint support by the Beef and Pork Checkoff programs.

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

   All information collected and generated in the MDM project is posted to a dedicated page on K-State's AgManager.info website. Accordingly, everything is publicly available for not only State Beef Councils, but also individual producers who may be interested. It is also of note, a new dashboard is being built to show state-level patterns (e.g. how daily beef consumption, ground beef demand, the importance of price vs. taste, etc. varies across the 50 U.S. states – to the extent sample sizes allow) differ. It is very likely this new data visualization resource, and importantly the underlying information that is only available due to the MDM project, will be of keen interest to several State Beef Councils.

   This is also consistent with the included AR amendment targeting an increase in the monthly sample of survey respondents to better support geographically-oriented (state- or region-specific rather than national) assessments.

POTENTIAL PARTNERSHIP LIST
Partners/collaborators does NOT include subcontractors.

As noted above in the "Other Funding" budget section, there is an ongoing partnership between the Beef and Pork Checkoffs in jointly funding the Meat Demand Monitor since its inception. This further leverages Beef Checkoff resources and enables the Meat Demand Monitor project to have a larger impact.

DETAILED BUDGET SUMMARY

In the following three sections, use the tables to report program budget information from the following funding sources:

- Cattlemen's Beef Board/Beef Promotion Operating Committee (CBB/BPOC)
- "Other Funding" sources such as:
  - Federation of State Beef Councils (FSBC)
  - Individual Qualified State Beef Council (QSBC) Funds
  - Government Funds (e.g., Market Access Program, Foreign Market Development)
  - Grain/Oilseed Funds (e.g., National Corn Growers Association, American Soybean Association)
  - Corporate Funds (e.g., tech and pharma companies)
  - Etc.

Section 1 – FY23 Funding Requested by Tactic

CBB/BPOC Funding Requested by Tactic
The following table outlines the amount of CBB/BPOC funding that is being requested for each tactic within this AR, and the committee(s) that has been selected to score each tactic.

CBB/BPOC Funding Requested by Tactic					
Committee Name	Tactic	Tactic Name	Direct Costs	Implementation	Total
Domestic Marketing	A	Meat Demand Monitor	$426,000	$24,000	$450,000
		TOTAL	$426,000	$24,000	$450,000

Other Funding Sources Requested by Tactic

The following table reports the amount of proposed and/or anticipated "Other Funding" sources that would be applied to this AR's tactics. The funding information in this table is for informational purposes only and demonstrates external collaboration as delineated in the 2021-2025 Beef Industry Long Range Plan.

Other Funding Sources Requested by Tactic *(Informational Only)*			
Funding Source	**Tactic**	**Tactic Name**	**Total**
Pork Checkoff	A	Meat Demand Monitor	$450,000
		TOTAL	**$450,000**

Use the space to below if you wish to provide additional comments/information on the FY23 CBB/BPOC or Other Funding amount that are being requested for this AR's tactics.

- $426,000 in direct costs cover ongoing survey execution and analysis, personnel, travel expenses, and online dashboard support for three years of the Meat Demand Monitor project.

- $24,000 in implementation costs cover $8,000 in annual expenses for USCA as the AR contractor.

- "Other Funding" reflects ongoing partnership between the Beef and Pork Checkoffs in jointly funding the Meat Demand Monitor since its inception. This further leverages Beef Checkoff resources and enables the Meat Demand Monitor project to have a larger impact.

Section 2 – Summary of FY22 AR Budgets and Expenses

AR Classification

This section reports budget information on ARs that are continuing program work from last year. The below description outlines the classification category the describes this AR.

Classification:	This AR is proposing new program initiatives that are not related to last year's research program work; therefore, we do not have any prior year budget information to report.

FY22 CBB/BPOC Funding

This table reports the amount of awarded and expended CBB/BPOC funding for this AR in FY22.

FY22 CBB/BPOC Funding			
	AR# N/A		
	Direct Cost	**Implementation**	**Total**
Funds Awarded	$	$	$
Actual Expenses (October 1, 2021 – June 30, 2022)	$	$	$

FY22 Other Funding Sources

The following table reports the amount of committed and expended "Other Funding" sources for this AR in FY22. The funding information in this table is for informational purposes only and demonstrates external collaboration as delineated in the 2021-2025 Beef Industry Long Range Plan.

FY22 Other Funding Sources *(Informational Only)*			
	AR# N/A		
	Funding Source	**Funds Committed**	**Funds Expended** (October 1, 2021 – June 30, 2022)
A	N/A	$	$

Use the space to below if you wish to provide additional comments/information on the FY22 CBB/BPOC or Other Funding budget and expense summaries.

This was a new AR in FY20, which did not request further funding after CBB/BPOC funds were awarded in FY20. Therefore, there is not any CBB/BPOC funding to report from FY22.

Section 3 – Historical Summary of AR Budgets and Expenses

AR Classification

This section reports budget information on ARs that are continuing program work from last two years (or longer). The below description outlines the classification category the describes this AR.

Classification: This AR is a continuation of, or builds upon, program work from the last two years (or longer). CBB will report information in the "CBB/BPOC Historical" table, and we will provide information for the "Other Funding Sources Historical" table.

CBB/BPOC Funding – Historical Summary

This table reports the amount of awarded and expended CBB/BPOC funding for this AR in FY19, FY20, and FY21.

CBB/BPOC Funding *Note: The Cattlemen's Beef Board completed the fields in this table.*		FY21 AR# N/A	FY20 AR# 2012-R	FY19 AR# N/A
AR Period[1]	Start Date:	*October 1, 2020*	*October 1, 2019*	*October 1, 2018*
	End Date:	*N/A*	*October 1, 2022*	*N/A*
Funds Awarded		$	$359,126	$
Actual Expenses[2]		$	$307,013	$

[1]For multiyear ARs, the "End Date" reflects the date that the AR is schedule to be completed.

[2]If the AR "End Date" has not year occurred, actual expenses will be reflective of the following time period: AR Start Date - June 30, 2022.

Other Funding – Historical Summary

The following table reports the amount of "Other Funding" source expenditures for this AR in FY19, FY20, and FY21. The funding information in this table is for informational purposes only and demonstrates external collaboration as delineated in the 2021-2025 Beef Industry Long Range Plan.

	Other Funding Sources *(Informational Only)*					
	FY21 AR# N/A		FY20 AR# 2012-R		FY19 AR# N/A	
	Funding Source	Total Expenditures	Funding Source	Total Expenditures	Funding Source	Total Expenditures
A	N/A	$	Pork Checkoff	$300,000	N/A	$

Use the space to below if you wish to provide additional comments/information on the historical CBB/BPOC or Other Funding budget and expense summaries.

This was a new AR in FY20, which did not request further funding after CBB/BPOC funds were awarded in FY20. Therefore, there is not any CBB/BPOC funding to report from FY19 or FY21.