United States Cattlemen's Association

AR# 2612-R
AR Title: Meat Demand Monitor

Amount Requested: $650,000.00

Organization Information

Name of Contractor:	United States Cattlemen's Association
Name of Subcontractor:	Kansas State University
Primary Contact:	Dr. Glynn Tonsor
Primary Signatory:	Kelly Fogarty

Full Application

AR Purpose and Description:

The Meat Demand Monitor (MDM) project was formally launched in February 2020 reflecting joint funding support by the beef and pork checkoff programs. The MDM project is a huge success and continues to grow in scope, impact, and recognition. This AR is to support three additional years of beef checkoff support enabling continuation and further expansion of the MDM project as outlined below. This FY26 AR now contains six objectives reflecting Agralytica's review suggestions, Domestic Marketing Committee feedback received in San Diego, and combined broad support to continue and expand the MDM effort.

The MDM project can be summarized as an ongoing, monthly U.S. resident survey-based effort that notably enriches understanding of domestic meat demand, consumption, and preferences. Surveys of over 3,000 residents are completed each month focused on retail (grocery store) and food service (restaurant) market channels. This provides novel, timely, and freely accessible information not otherwise available. Furthermore, the uniquely large sample size enabled by partnering with the pork checkoff supports refined assessments not available elsewhere.

As witnessed by notable interest in MDM outputs (examples shared below), the broader MDM project is widely recognized and steadily 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 continuing joint leveraging of investment by both programs in this public-facing, fully transparent, and freely-available, data-driven program based at Kansas State University (KSU). Extension of the MDM project is included in this AR per both Agralytica's suggestion to increase reach and elevate direct impact assessment as well as Domestic Marketing Committee suggestions to incorporate scanner data aspects to further leverage existing beef checkoff investments. The full AR as presented for BPOC consideration reflected that combined feedback. Ultimately those expansions are removed here due to final funding allocations but we note them here to respect and document the United States Cattlemen's

Additional background information and procedural details on the MDM project are provided at the end of this AR document for those less familiar with the MDM effort.

Citations:

Research Accessibility & Dissemination:

- All procedural details, all raw data as collected, and all generated outputs of the entire MDM project are freely and fully available via KSU's AgManager.info website: https://agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data. As long as the MDM is supported by beef and pork checkoffs, fully transparent and free access will continue, which is consistent with the project's initial aspirations and Dr. Tonsor's vision from project initiation.
- We will highlight only four examples of high-impact engagement with media to extend and operationalize MDM insights.
    - Every month Tonsor conducts a ~10 minute interview on AoA (now with Jesse Allen, originally with Mike Pearson) to overview the latest MDM information.
        - The latest AoA reach impact estimates were obtained from Jesse Allen on May 27, 2025. For each monthly engagement, AoA radio network impressions are 54,254, farmers listening via Sirius Rural Radio are 59,847, and each AoA podcast is downloaded 7,500 times per month. Combined these impact estimates point to significant reach consistent with Dr. Tonsor's intentionally having AoA be a primary MDM dissemination partner.
    - Tonsor increasingly engages with a wide range of media outlets to share MDM information on contemporary U.S. meat issues.
        - One recent example is this Atlantic ("America is Done Pretending about Meat") article that uses MDM information to document growing meat demand, a decline in vegan and vegetarian rates, and the inability of plant-based patty products to expand in the U.S. As one metric of wide impact, note The Atlantic's LinkedIn channel had 1.7 million followers as of March 2025.
    - Kicking off the last AR cycle of beef checkoff support, in October 2022 as part of the U.S. Farm Report's College Roadshow, Tonsor partnered with Tyne Morgan to include a ~3-minute special USFR segment on the MDM. An extended discussion of MDM's Protein Values data guided an overview of the fall 2022 domestic beef demand situation. As the most recent example of USFR collaboration, on June 4, 2025 Tonsor and Morgan had a ~5 minute interview at World Pork Expo that covered the broader meat protein complex and how MDM data confirms "meat is having a moment."
        - USFR listeners/viewers exceed 475,000 for each interview (airing on 145 local affiliates across the U.S.) with an additional 5,000 engagements estimated per AgDay's webpage.

    - In November and December of 2024 Tonsor partnered with RFD-TV and their "Market Hits" segment to provide 4-5 minute, live overviews in three consecutive weeks. This included using MDM data to clarify the impact of financial sentiment on meat demand, document segmentation of the U.S. public in how they approach meat buying, and illustrate the reduced meat price sensitivity of those active in personal fitness and weight-lifting.
- We will highlight just two of the seven peer-reviewed research publications based on MDM information.
    - The 2022 Meat Science article ("U.S. Perspective: Meat Demand Outdoes Meat Avoidance") co-authored by Tonsor and Jayson Lusk (now Dean of Agriculture, Oklahoma State University) documents trends in U.S. meat consumption and the relative low prevalence of vegan and vegetarian diets.
    - In "Demand Dashboards: Interactive Tools to Communicate Consumer Behavior" Justin Bina (Assistant Professor, Arizona State University) and Tonsor (2023) present and discuss jargon-free, real-world application of the MDM dashboard that is now publicly available providing state-level, data-driven insights not available elsewhere.
        - Important to appreciate here is this dashboard was created following feedback received in 2022 from the Domestic Marketing Committee corresponding further with feedback from state beef councils who have engaged directly with the MDM project.
        - While beef checkoff support was not available (per reduced support in final FY23 AR), initially this was supported by pork checkoff given common interests in the project expansion. Going forward, a return to joint support from both beef and pork checkoff programs is planned (see objective #3).

CBB Budget Category: Research

Start Date: 10/1/2025

End Date: 9/30/2028

FY26 National Beef Checkoff Funding Request		
Direct Costs	**Implementation**	**Total**
$620,000.00	$30,000.00	$650,000.00

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

- Grow Consumer Trust in Beef Production
- Promote and Capitalize on the Multiple Advantages of Beef
- Safeguard and Cultivate Investment in Beef Industry Research, Marketing and Innovation

One industry objective of the current LRP is (to) "*Grow global demand for U.S. beef by promoting beef's health and nutritional benefits, satisfying flavor and unparalleled safety*." This AR directly contributes to this leading industry objective as the MDM provides novel data documenting current beef demand as well as evidence on the relative role of health, nutrition, taste, freshness, and safety in purchasing decisions.

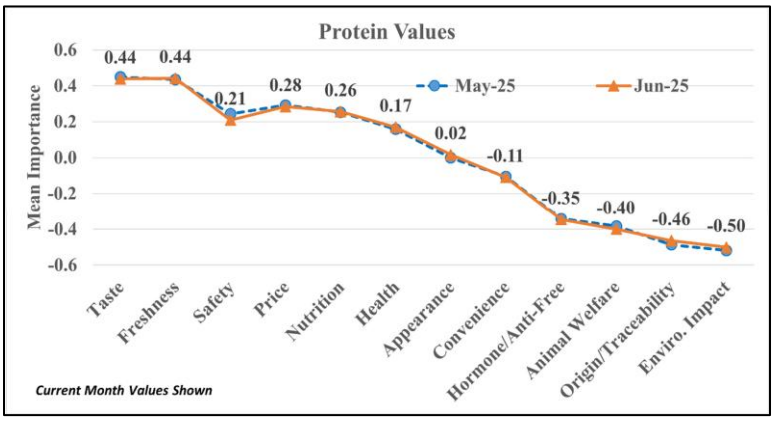
The MDM's fit and contribution to the current LRP was noted in June 2025 by Agralytica.

Further, this is accomplished by leveraging beef checkoff funds as MDM support is shared by the pork checkoff. This AR also directly contributes to the LRP goal "*ensure that publicly-funded research and intellectual capital remains in the public domain*" as 100% of the MDM projects data, information, and generated outputs are fully and freely available online to all interested parties.

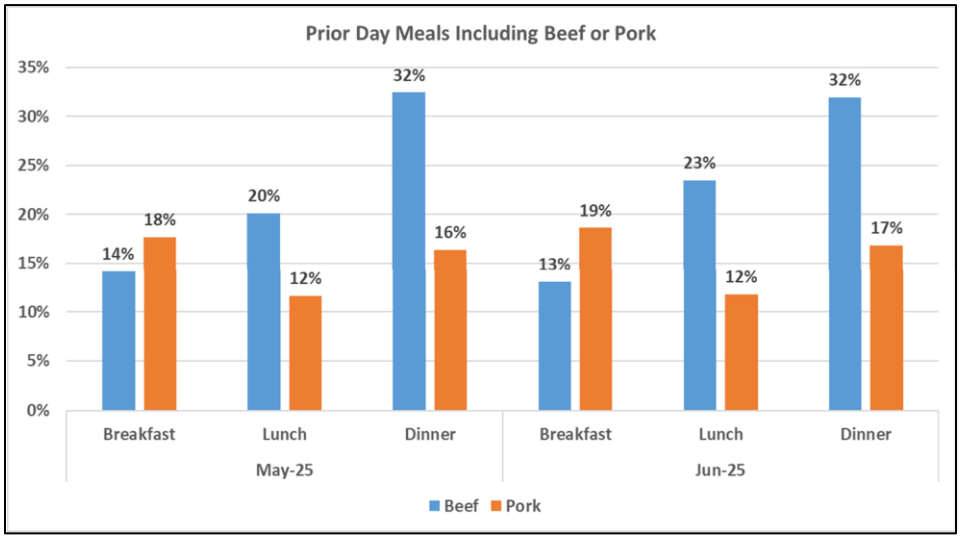
- Given the wide range of domestic meat demand, consumption, and perception issues tracked every month, the MDM project aligns with multiple Beef Industry Long Range Plan core strategies.
    - To help succinctly give evidence and demonstrate some of the many ties between the MDM project and the LRP, consider the following 5 demonstrative figures that appeared in the June 2025MDM base monthly report. These also appeared in associated USDA-approved X/Tweets and LinkedIn posts by Dr. Tonsor leading to wide reach and impact.

RETAIL		Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
May-25	*WTP ($/lb)*	$ 17.73	$ 9.09	$ 7.28	$ 6.25	$ 8.80	$ 8.13	$ 10.33	$ 3.46	
	Market Share	8%	25%	12%	8%	27%	2%	5%	7%	6%
Jun-25	*WTP ($/lb)*	$ 17.62	$ 8.82	$ 7.13	$ 6.19	$ 8.55	$ 8.34	$ 9.61	$ 3.40	
	Market Share	8%	25%	13%	8%	27%	2%	4%	7%	6%
FOOD SERVICE		Ribeye Steak	Beef Hamburger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
May-25	*WTP ($/lb)*	$ 26.56	$ 20.27	$16.06	$ 18.20	$ 18.41	$ 12.68	$ 17.74	$19.48	
	Market Share	14%	26%	5%	9%	15%	4%	12%	9%	5%
Jun-25	*WTP ($/lb)*	$ 26.17	$ 20.02	$15.91	$ 17.67	$ 18.04	$ 12.76	$ 17.49	$19.01	
	Market Share	14%	27%	5%	9%	15%	4%	12%	8%	6%

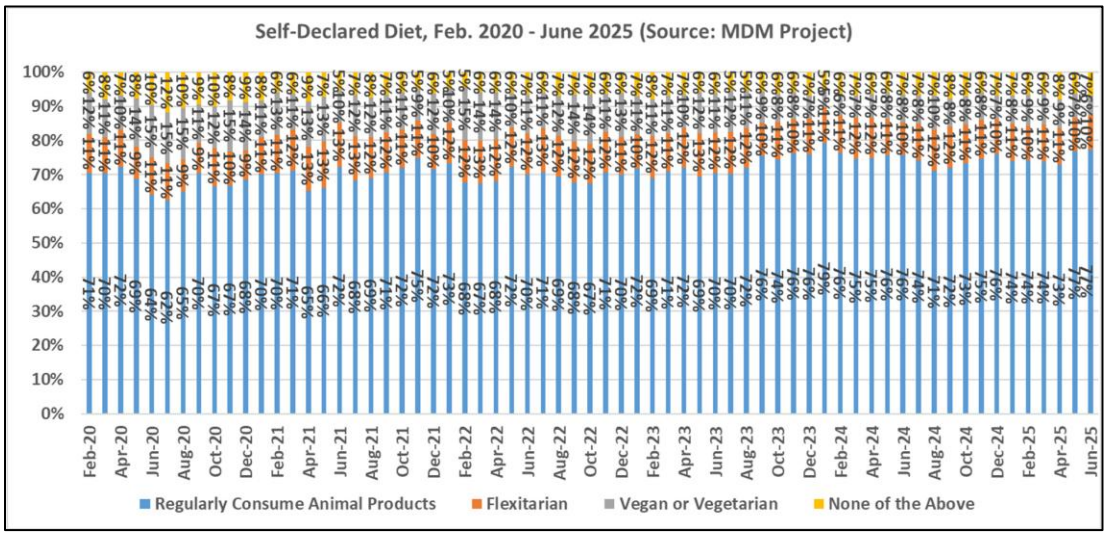
- This figure shows small declines in both ribeye steak and ground beef/hamburger demand (consumer willingness-to-pay is estimated) in June compared to May 2025, in both retail ($/lb) and food service ($/dinner meal) market channels. Note by regularly examining demand for two separate beef products in two different domestic market channels demand knowledge is notably extended beyond what is otherwise available. On balance, retail beef demand growth has offset challenges in food service channel demand in recent months.



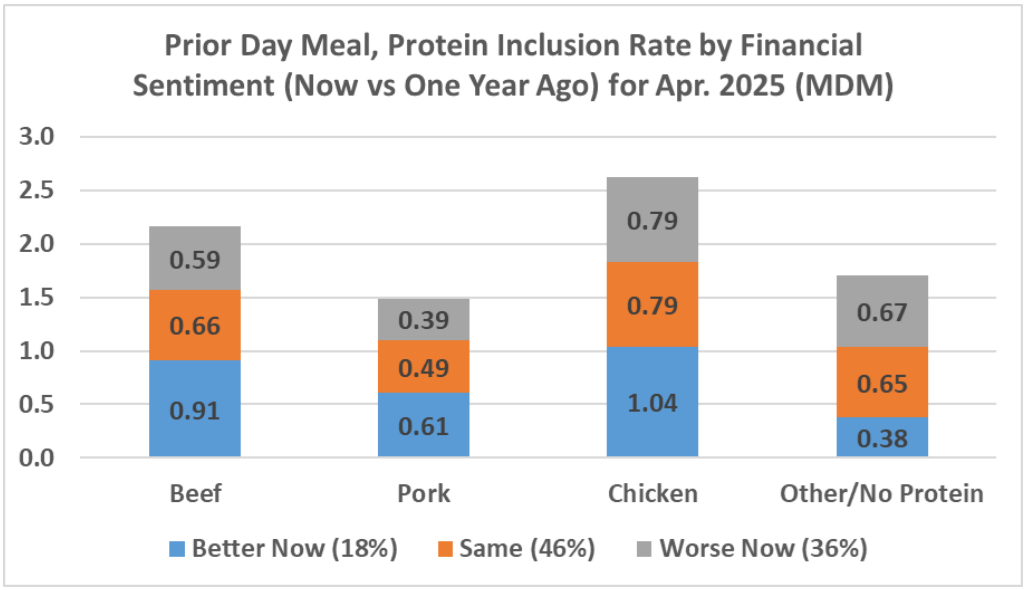
- This figure shows the ongoing elevated importance of taste, freshness, safety, and price in protein purchasing decisions of the typical U.S. resident. The leading role of taste in particular aligns with enhanced consumer beef demand and corresponding improvements in grading outcomes of live cattle (i.e. higher rate of Prime and Upper-Choice).
    - The forced rank nature of the MDM Protein Values assessment yields deeper, relative prioritization insights than available from more prevalent, Likert-scale questioning.



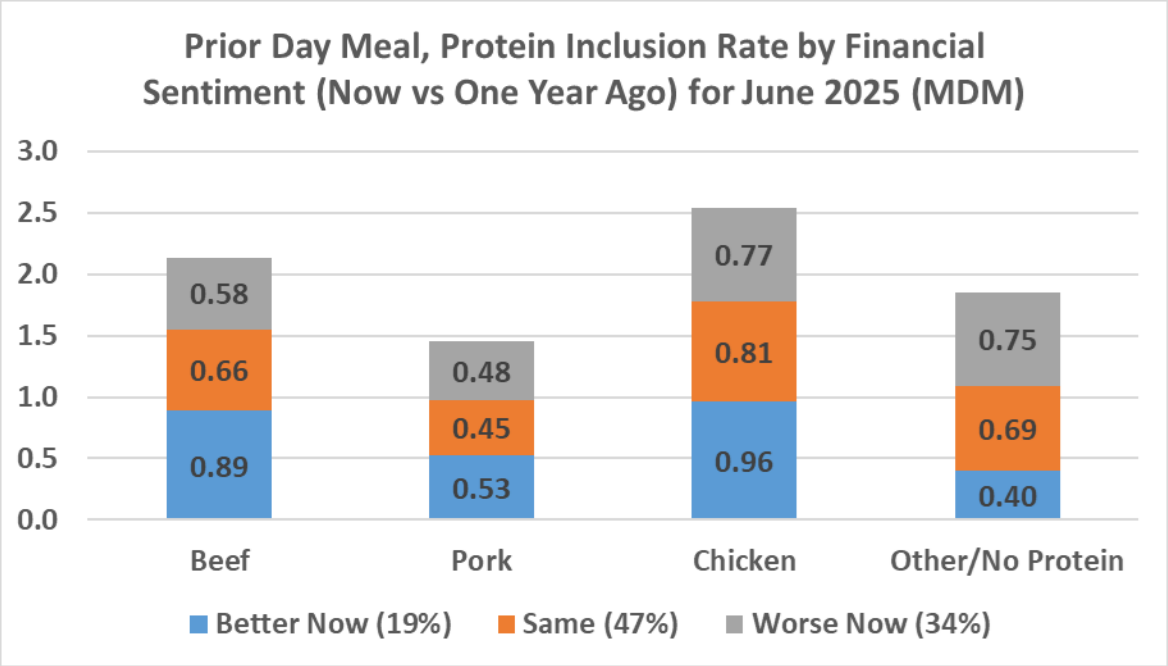
- This figure shows how inclusion of beef varies by meal regularly showing the leading role of beef in dinner meals. The MDM also provides ongoing opportunity to delineate consumption (meal inclusion rate here) and demand (i.e., $/lb or $/meal valuations) that often are confused.



- This figure shows how self-declared diets of U.S. residents have varied since the MDM launched in February 2020. There is a slight, upward trend in the rate of regular meat consumption (and corresponding decline in vegan/vegetarian rates) as noted in the Atlantic 2025 article referenced above.



- This figure summarizes the current state of financial sentiment (only 19% report improved finances vs. prior year) and how beef consumption (meal inclusion frequency here) rates increase with improved financial sentiment. Here in 2025, substantial industry and media interest has followed this specific MDM insight given ongoing macroeconomic developments of direct relevance to consumer demand.

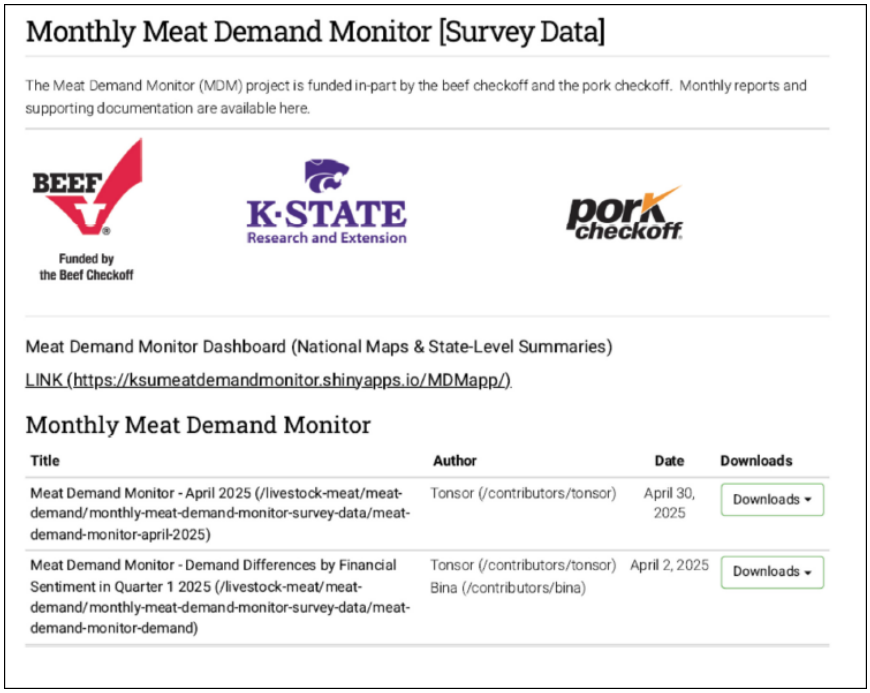

Prior Day Meal, Protein Inclusion Rate by Financial Sentiment (Now vs One Year Ago) for June 2025 (MDM)
3.0
2.5
2.0
1.5
1.0
0.5
0.0
0.58
0.66
0.89
0.48
0.45
0.53
0.77
0.81
0.96
0.75
0.69
0.40
Beef
Pork
Chicken
Other/No Protein
Better Now (19%)
Same (47%)
Worse Now (34%)

Tactic A | 2612-R
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. The project is widely recognized as being data-driven and unbiased as a resource based at Kansas State University that is jointly supported by the beef and pork checkoff programs.

All MDM project information and outputs are posted to K-State's AgManager.info website here: https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data



Some example dissemination highlights include:

- As of May 1, 2025 there have been over 35,519 page views of the MDM webpage on AgManager.info
    - This covers publishing 63 base monthly reports (Feb. 2020 – Apr. 2025) and 19 special reports providing deeper, novel insight from MDM information. For instance, in January 2025 a special MDM report examined GLP-1 (Ozempic, Mounjaro, Wegovy, etc.) effects and a July 2024 report examined who the largest beef buyers are.
- MDM information is now appearing monthly in interviews Dr. Tonsor has with Jesse Allen (and previously Mike Pearson), host of Agriculture of America. Impact estimates are provided above.

- MDM insights have been incorporated into other high-profile interviews including U.S. Farm Report, RFD TV, AgWeb, BEEF, Drovers, Feedlot Magazine, Cattle Current Daily, Feedstuffs, VOX, CAST, MarketWatch, Supermarket News, The Atlantic, AgriTalk, Farm Progress, American Farmland Owner, Morning Ag Clips, New York Times, Wall Street Journal, Washington Post, and USDA's Agricultural Outlook Forum.
- MDM information has been used in both state- and federal-level testimony.
- USDA approved X/Tweets and corresponding LinkedIn posts are made each month following posting of new reports.
    - *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 that enhanced domestic beef demand understanding.*

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. The project is widely recognized as being data-driven and unbiased as a resource based at Kansas State University that is jointly supported by the beef and pork checkoff programs.

Measurable Objectives:

Measurable Objective #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.

a. 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.

Measurable Objective #2

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

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

b. Deeper assessments will occur reflecting ad hoc question insights afforded by the MDM as well as capacities of graduate students at KSU working with Tonsor on the MDM project. That is, based on MDM funding support for graduate student training, additional MDM assessments (i.e. GLP-1 and bigger beef buying reports noted above) have occurred. Recent years this has included several outputs as led by Justin Bina who now is a faculty member at Arizona State University.

Measurable Objective #3

Continue support for state-level data dashboard.

a. Following Domestic Marketing Committee feedback, and corresponding encouragement from state beef councils who engaged in the MDM project, we added a user-friendly dashboard in 2022. The third objective will be to continue this support and to extend it with additional MDM variables as feasible. This will enable ongoing leveraging by external partners following easier use and translation of MDM information.

b. Given overlapping interest of both beef and pork state councils, returning to joint checkoff support is included in this AR. Narrowly, initial inclusion of the state-level dashboard was not supported by beef checkoff investment due to reductions in the last awarded MDM AR (FY23).

Measurable Objective #4

Wide and influential dissemination of main findings and implications.

a. The fourth objective will be met by continuing to release approved X/Tweets and LinkedIn posts as well as ongoing collaboration with multiple, high-impact media partners (see prior sections above) interested in MDM information.
    i. Furthermore, additional beef stakeholder, in-person dissemination nationally by Dr. Tonsor is anticipated as this current AR request reinstates travel support (for January/February beef checkoff meeting participation; but not travel funding for summer business meetings) that was removed per budgetary adjustments required in the previously approved AR (FY23).

Given this AR is to continue the MDM project, it is further worth reiterating all consumer survey data originating in this project, underlying survey instruments, and associated documentation are fully available online. That is, everything from the MDM is freely and fully available via KSU's AgManager.info website. 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 and builds confidence among stakeholders given the project's complete transparency.

Summary of Monthly Data and Information

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 will continue. 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) in purchasing decisions.
4. Quantify the frequency and location of beef and pork consumption in the past week; separately for the number of meals consumed at-home vs. away from home.
    a. The protein source (i.e. Grocery Store vs Club Store) of at-home meals and outlet type (i.e. Casual Dining vs Quick Service) of away-from-home meals will be tracked.
5. Quantify prevalence of regular meat consumer, flexitarian, vegetarian, and vegan self-declared diets.

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.

Each month an Executive Summary, ~3-page report will continue to be publicly posted to widely disseminate main findings and trends relative to previously collected information. Regularly posted figures provide an easy to follow pulse for those interested in tracking MDM trends and developments.

Performance Efficiency Measures:

General Target Audience

Consumer Reach Goal: 24,000 annually

This will be met solely by direct survey participation with additional media reach leading to the goal being surpassed.

Consumer Engagement Goal: 1,200 annually

This reflects a conservative estimate that only 5% of those reached will engage and take action with received information.

Producer Reach Goal: 30,000 annually

This will be met by direct participation in educational events and additional media reach (including regular AoA and other MDM outreach).

Producer Engagement Goal: 1,500 annually

This reflects a conservative estimate that only 5% of those reached will engage and take action with received information.

Key Opinion Leaders

Jesse Allen, Agriculture of America (AoA) Reach Goal: 100,000

Radio listeners reached for each MDM interview; expected impact given ongoing engagement of Dr. Tonsor and MDM information AoA and their media outlets.

Jesse Allen, Agriculture of America (AoA) Engagement Goal: 7,500

Engagements via podcast downloads for each MDM interview; expecting monthly interviews given recent engagement of Dr. Tonsor and MDM AoA.

Tyne Morgan, host of US Farm Report (USFR) and Coordinator of College Roadshow programming – Reach Goal: 475,000

Listeners/video viewers reached for each interview.

Tyne Morgan, host of US Farm Report (USFR) and Coordinator of College Roadshow programming – Engagement Goal: 5,000

Via AgDay page views, which is a conservative goal for each interview.

Combined, this points to substantial reach from Dr. Tonsor and the MDM project partnering with Tyne Morgan and USFR.

LRP Initiatives Addressed by this Tactic:

Grow Consumer Trust in Beef Production

- Measure, document, improve, and communicate the net climate and environmental impact of beef production
- Align and collaborate with traditional and nontraditional partners to tell the positive story of beef cattle production
- Educate medical, diet and health professionals about beef and beef production

Promote and Capitalize on the Multiple Advantages of Beef

- Develop targeted marketing programs focused on the highest opportunity market segments
- Cultivate collaborative promotion partnerships

Safeguard and Cultivate Investment in Beef Industry Research, Marketing and Innovation

- Attract innovation and intellectual capital and cultivate the next generation of talent into the beef industry
- Encourage the cooperation and collaboration of existing industry advisory committees to identify and prioritize research efforts
- Increase industry funds for beef marketing, promotion and research

It is also of note that the MDM effort clearly aligns with the new LRP that would be applicable in future years given that three years of funding support is included in this AR.

Checkoff Program Committee(s): Domestic Marketing

CHECKOFF PROGRAM COMMITTEE ALIGNMENT:
Given the wide range of domestic meat demand, consumption, and perception issues tracked every month, the MDM project aligns with multiple committees. Consistent with past AR cycles, we believe the MDM project most aligns with the Domestic Marketing committee. As suggested by CBB we presented an earlier version of this AR to the Domestic Marketing committee in July 2025. That said, aspects regarding Nutrition, Health, Safety, and Convenience are ongoing components of the MDM effort that likely are of interest to additional Committees consistent with the broad, industry contributions noted by Agralytica.

Supplemental Information for This AR

1. **Please explain significant changes from the FY25 approved AR.**
   The MDM project was originally launched with beef checkoff support in 2019 with three years of support and renewed in 2022 with three additional years of support. Accordingly, there were not corresponding ARs for FY24 or FY25 and here for FY26 continuation and further expansion 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.

   As coordinated in 2025 by CBB for three active ARs, Agralytica recently completed an external evaluation of the MDM project. This FY26 AR was adapted early in June 2025 to reflect this evaluation. While the full 66 page report (PPTX file) is available from CBB, some MDM highlights include compliments such as: "*has delivered timely, transparent, and evolving consumer demand insights for the beef industry," "is a robust gauge of beef demand," "higher monthly sample (than CBT) allows greater ability to focus analysis," "state beef councils use tools like MDM to adapt messaging for local use," "MDM insights are used to plan seasonal messaging (e.g. grilling campaigns)," and suggestions for enhancement including "expand reach – increase visibility with more proactive Checkoff promotion," "hire dedicated analyst support," "define intended users," "improve dissemination tracking," "develop ongoing reporting systems," and "existing impact is real but under-documented.*"

It is also of note the other two Agralytica evaluated ARs have historically been funded at much higher levels than the MDM AR. The FY26 AR for continuation and expansion of the MDM effort, and associated Agralytica suggestions, includes an expanded budget to enable both continuation and suggested enhancement. Moreover the expansion of AR objectives further includes direct feedback from the Domestic Marketing Committee as received during the 2025 Summer Business Meetings in San Diego.

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 using their Samplify dashboard and nationally representative, online panel of U.S. residents. 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 MDM reports posted regularly to K-State's AgManager.info website where all MDM outputs (as well as raw data, survey instruments, etc.) are freely and fully available.

3. **Will all work with vendors/agencies be competitively bid? If no, please provide a brief description as to why.**
   KSU will continue to work with Dynata consistent with the successful relationship in place as the MDM project remains ongoing. The core intent of this AR is to enable a seamless continuation, and expansion, of the MDM project which in turn helps keep costs lower given multi-year planning efficiency gains.

   The addition in this AR of external communication support (see objective 4) will include assessment of interests and capacity of possible partners.

4. **Has this AR built upon past work or projects that have been previously funded by the BPOC? If yes, please provide a detailed list and background information on the project and contractor(s) involved.**
   As noted above, the MDM project was launched in 2020 following joint support by the beef and pork checkoff programs. The end of current beef checkoff support is scheduled for September 2025 corresponding with this AR for renewed support spanning October 2025 to September 2028. This research AR has been funded on a multi-year basis given the ongoing data collection, analysis, and dissemination nature of the MDM effort.

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 was built following direct request of state beef councils (as reinforced by stated desires of the Domestic Marketing Committee in 2022) 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) differ. This new data visualization resource, and importantly the underlying information that is only available due to the ongoing MDM project, remains of keen interest to several State Beef Councils (and other stakeholders including state pork councils). As previously done, Dr. Tonsor remains available to engage state beef councils.

ADDITIONAL BACKGROUND ON MEAT DEMAND MONITOR (MDM)

Prior to the MDM 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 critical importance and comparative ambiguity. Meanwhile public funding for data gathering and reporting has persistently been stagnant increasing value of new data and information efforts.

In launching the MDM project, this situation was improved in implementing a 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 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 1,500 U.S. residents with a retail, grocery-store focus on meat demand. This is a continuation, of the MDM as launched in Feb. 2020.
2) A nationally representative online survey is conducted of at least 1,500 U.S. residents with a food service, restaurant focus on meat demand. This is a continuation, of the MDM as launched in Feb. 2020. 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 April 2025 base 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) in purchasing decisions.
4) Quantify the frequency and location of beef, pork, and chicken consumption in the past week; separately for the number of meals consumed at-home vs. away from home.
5) Quantify prevalence of regular meat consumer, flexitarian, vegetarian, and vegan self-declared diets.
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.

Detailed Budget Summary

The tables in the following three sections report program budget information from the following funding sources:

1. National Beef Checkoff Funding
2. Other Funding such as:
    - Federation of State Beef Councils (FSBC) Funds
    - 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)
    - Other

Definitions

National Beef Checkoff Funding is divided into:

- **Direct Costs:** These are expenses directly associated with executing program activities, including advertising, promotional materials, consulting fees, travel, and other project-specific costs.
- **Implementation:** These are the expenses that provide the process and infrastructure needed to put program activities into action, including overhead allocations and staff compensation (i.e. salaries and benefits).

Section 1 – FY26 Funding Requested by Tactic

FY26 National Beef Checkoff Funding Requested by Tactic

The following table outlines the requested amount of National Beef Checkoff funding for each tactic and the committee(s) that has been selected to score it/them.

National Beef Checkoff Funding by Tactic					
Committee Name	**Tactic**	**Tactic Name**	**Direct Costs**	**Implementation**	**Total**
Domestic Marketing	Tactic A	Meat Demand Monitor	$620,000.00	$30,000.00	**$650,000.00**
		Total	$620,000.00	$30,000.00	**$650.000.00**

FY26 Other Funding Requested by Tactic

The following table reports the amount of anticipated Other Funding that would be applied to each tactic. This information is for reference only and demonstrates external collaboration as delineated in the 2021-2025 Beef Industry Long Range Plan.

Funding Sources Requested by Tactic *(Informational Only)*			
Funding Source	**Tactic**	**Tactic Name**	**Total**
Other: Pork Checkoff	Tactic A	Meat Demand Monitor	**$600,000.00**
		Other Funding Total	**$600,000.00**

Section 1 – Additional Funding Comments:

Use the space below to provide any additional details about the FY26 National Beef Checkoff or Other Funding amounts requested, along with any anticipated third-party contributions* for this AR.

** Specify the type of third-party contributions, such as support from external organizations or in-kind goods and services (e.g., equipment, supplies, volunteer time, consulting), and their estimated value (individual or cumulative).*

OTHER FUNDING REQUESTED:

- Since beef checkoff support of the Meat Demand Monitor was initiated in 2019, there has been direct partnership with the pork checkoff. That is, the beef and pork checkoff programs have collaborated to leverage their respective investment to jointly support the MDM project based at Kansas State University.
- This external support of the pork checkoff continues as done in the past. Annual support of $200,000 is expected for each of the next three years consistent with joint partnership since the MDM launched 6 years ago

Section 2 – Summary of FY25 AR Budgets and Expenses

Classification:	This AR expands upon previously funded program work from last year. While CBB will enter information into the FY25 National Beef Checkoff Funding table, we (the contractor) will report corresponding details in the FY25 Other Funding table.

FY25 National Beef Checkoff Funding

This table reports the amount of awarded and expended National Beef Checkoff funding for this Authorization Request in FY25.

FY25 National Beef Checkoff Funding *Note: The Cattlemen's Beef Board completed the fields in this table.*			
	AR# 2512-R		
	Direct Costs	**Implementation**	**Total**
Funds Awarded	N/A	N/A	N/A
Actual Expenses *(October 1, 2024 – June 30, 2025)*	N/A	N/A	N/A

FY25 Other Funding

The following table reports the amount of committed and expended Other Funding for the FY25 AR. This funding information is for informational purposes only and demonstrates external collaboration as delineated in the 2021-2025 Beef Industry Long Range Plan.

FY25 Other Funding *(Informational Only)*			
	AR# 2512-R		
	Other Funding Source	**Funds Committed**	**Funds Expended** *(October 1, 2024 –June 30, 2025)*
A	Other: Pork Checkoff	$200,000.00	$200,000.00

Section 2 – Additional Funding Comments:

Use the space below if you wish to provide additional comments/information on the historical National Beef Checkoff or Other Funding budget and expense summaries, as well as details on third-party contributions* that supported these ARs.

** Specify the type of third-party contributions, such as support from external organizations or in-kind goods and services (e.g., equipment, supplies, volunteer time, consulting), and their estimated value (individual or cumulative).*

- As stated in Section 1, since beef checkoff support of the Meat Demand Monitor was initiated in 2019 there has been direct partnership with the pork checkoff. That is, the beef and pork checkoff programs have collaborated to leverage their respective investment to jointly support the MDM project based at Kansas State University. The following outlines the "Other Funding" received from the Pork Check over the last three years for this research AR:
    - FY23: Funds Committed – $200,000 | Funds Expended – $200,000
    - FY24: Funds Committed – $200,000 | Funds Expended – $200,000
    - FY25: Funds Committed – $200,000 | Funds Expended – $200,000

Section 3 – Historical Summary of AR Budgets and Expenses

Classification:	This AR expands upon previously funded program work from the past two years or more. While CBB will enter information into the National Beef Checkoff Funding Summary table, we (the contractor) will report information in the Other Funding Summary table.

National Beef Checkoff Funding – Historical Summary

The following table reports the amount of awarded and expended National Beef Checkoff funding for the FY22, FY23, and FY24 ARs.

National Beef Checkoff Funding – Historical Summary *Note: The Cattlemen's Beef Board completed the fields in this table.*				
		FY24	**FY23** **AR# 2312-R**	**FY22**
AR Period[1]	*Start Date:*		*Oct. 1, 2022*	
	End Date:		*Sep. 30, 2023*	
Funds Awarded		N/A	$450,000.00	N/A
Actual Expenses[2]		N/A	$253,096.83	N/A

[1]For multiyear ARs, the "End Date" reflects the date that the AR is scheduled to be completed.
[2]If the AR "End Date" has not occurred, actual expenses will be reflective of the following time period: AR Start Date – June 30, 2025.

Other Funding – Historical Summary

The following table reports the amount of Other Funding expenditures for the FY22, FY23, and FY24 ARs. 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 – Historical Summary *(Informational Only)*						
	AR# 2312-R				**FY22**	
	FY24		**FY23**			
	Other Funding Source	**Total Expenditures**	**Other Funding Source**	**Total Expenditures**	**Other Funding Source**	**Total Expenditures**
A	Other: Pork Checkoff	$200,000.00	Other: Pork Checkoff	$200,000.00	N/A	$0.00

Section 3 - Additional Funding Comments:

Use the space below if you wish to provide additional comments/information on the historical National Beef Checkoff or Other Funding budget and expense summaries, as well as details on third-party contributions* that supported these ARs.

** Specify the type of third-party contributions, such as support from external organizations or in-kind goods and services (e.g., equipment, supplies, volunteer time, consulting), and their estimated value (individual or cumulative).*

- To date, beef checkoff support of the MDM has occurred in two previous FY cycles. In FY20 (Oct. 2019 - Sep. 2022; AR2012) authorized beef checkoff support was $341,126. Most recently, in FY23 (Oct. 2022 - Sep. 2025; AR 2312) authorized beef checkoff support was $426,000. Combined, the initial six years of MDM support from the beef checkoff has totaled $767,126 (for an average of $127,854 per year).

- As noted above, the pork checkoff has been a persistent external funding partner. Over the November 2019 – December 2025 period pork checkoff MDM support totals $764,451.

- The ongoing partnership of the beef and pork checkoff has been critical to sustaining the nationally representative nature of MDM data collection as well as helped elevated joint reach, impact, and real-world value enabling each program to leverage their respective investments.