



BEEF
RESEARCH

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Consumer Insights

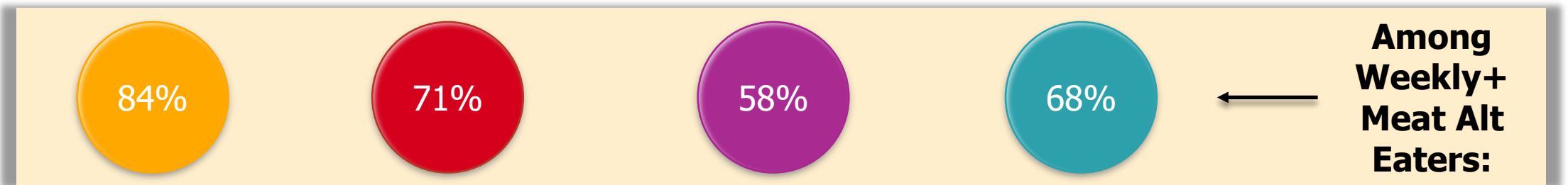
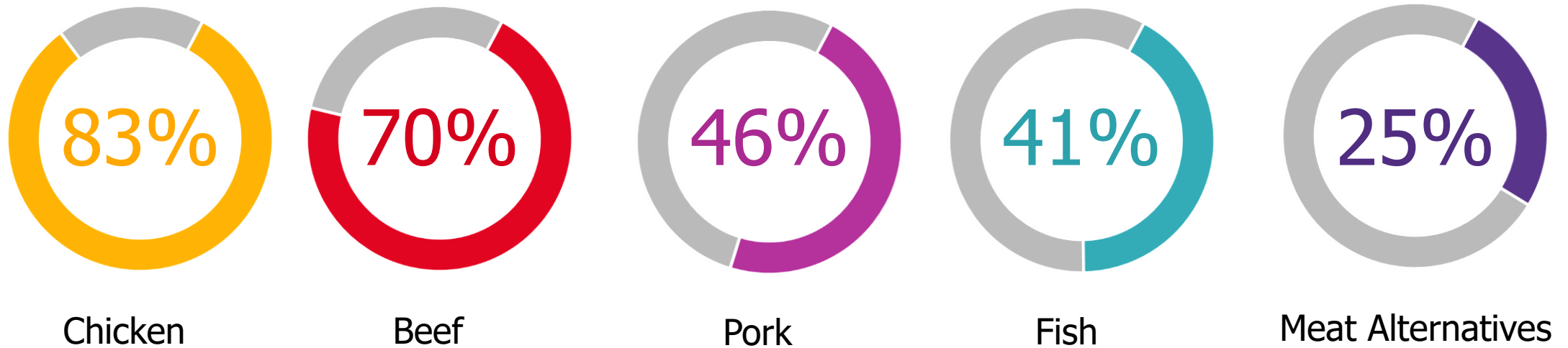
National Cattlemen's
Beef Association,
a contractor to the Beef Checkoff
February 2024

Consumers of Meat Alternatives Still Eat Other Proteins

A large majority of consumers eat beef and chicken at least once per week. Those who eat meat alternatives at least once per week still frequently eat a variety of other meat proteins, including beef.

Note: Since 2021,
Beef up 1 pt.,
Chicken up 3 pts.,
Meat Alt. down 6 pts.

Percent (%) of Consumers Eating Each Protein Weekly+

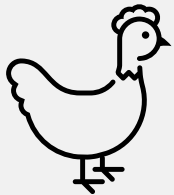


Source: Consumer Beef Tracker, Jan. – Dec. 2023. Q1: "Thinking about all of your meals – breakfast, lunch, dinner and snacks – how frequently do you eat each of the following types of food?"
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Consumer's Overall Top Protein of Choice

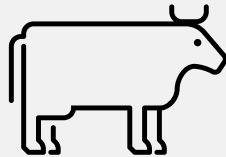
When asked to indicate their overall top protein of choice from the below proteins, 44% of consumers choose chicken and 35% of consumers choose beef.

First Choice:
Chicken



44%

First Choice:
Beef



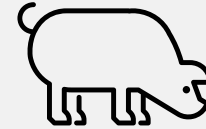
35%

First Choice:
Fish



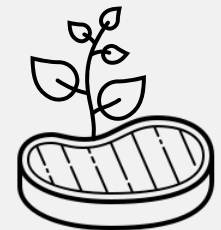
12%

First Choice:
Pork



4%

First Choice:
Meat Alternatives



5%

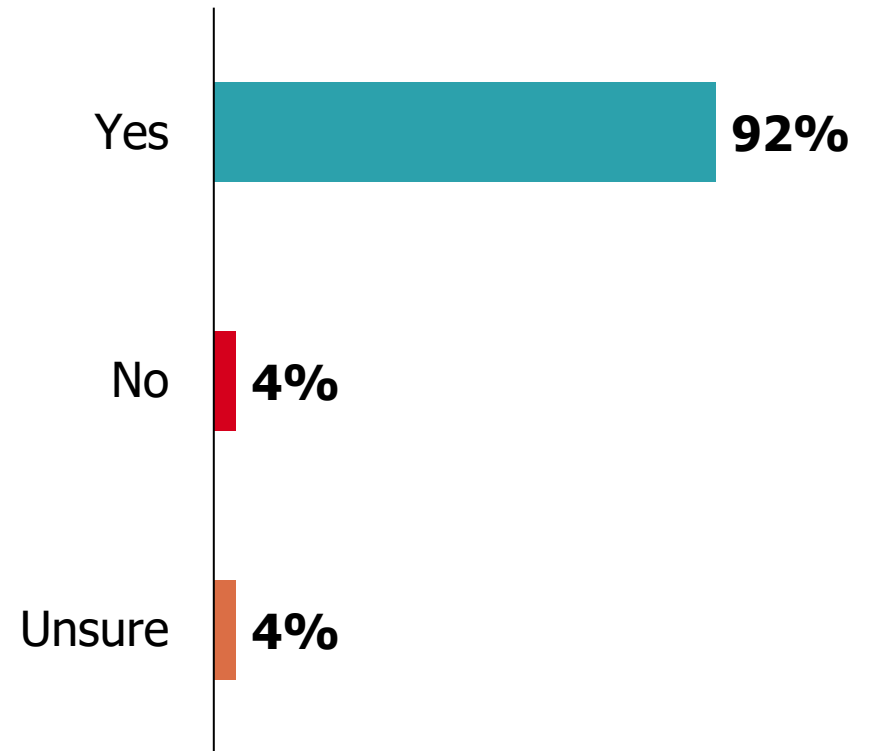
At Home Eating

Three-quarters of meals are being cooked at home and 40% anticipate cooking more meals at home (and majority plan to continue doing so).

Percentage of Meals Prepared/Cooked At Home



Will You Continue to Cook More Meals at Home?



Change in At-Home Cooking Behavior



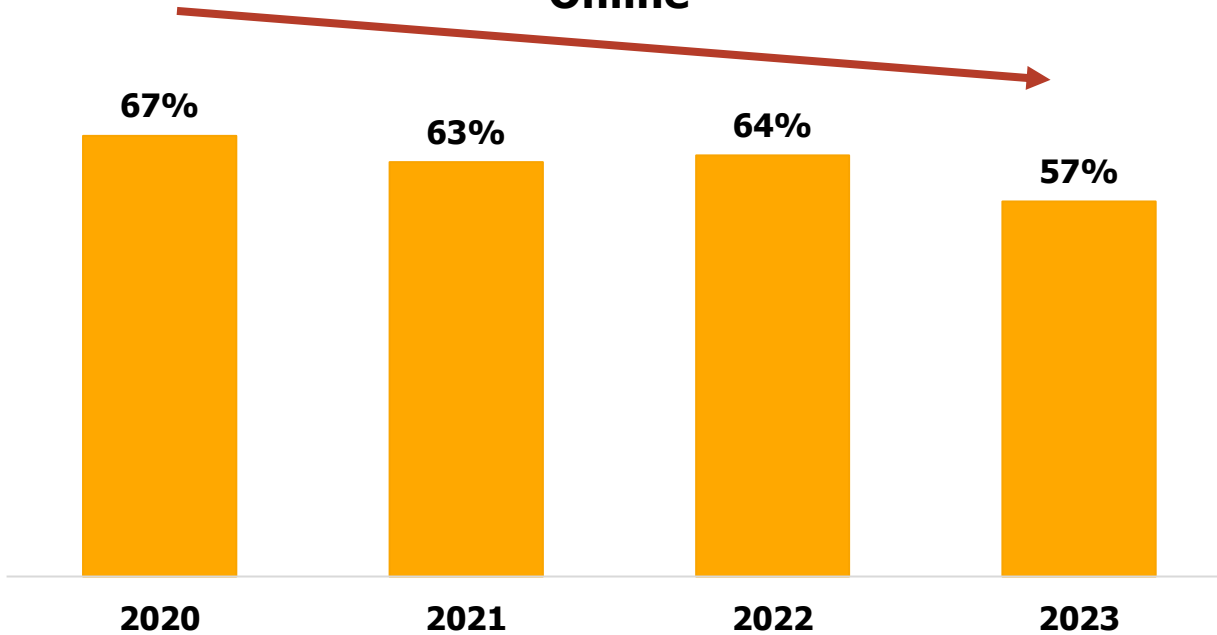
Source: State of Consumer Survey, June 2023, Qualtrics/PureSpectrum, n=1363. Thinking about the number of meals you are currently cooking at home, what percentage of your meals do you think you are preparing and/or cooking at home? Is [insert percentage] percent of meals prepared and/or cooked at home more, less or the same as 6 months ago? Do you expect to continue preparing and/or cooking more meals at home? (n=546).

Survey designed and analyzed by National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

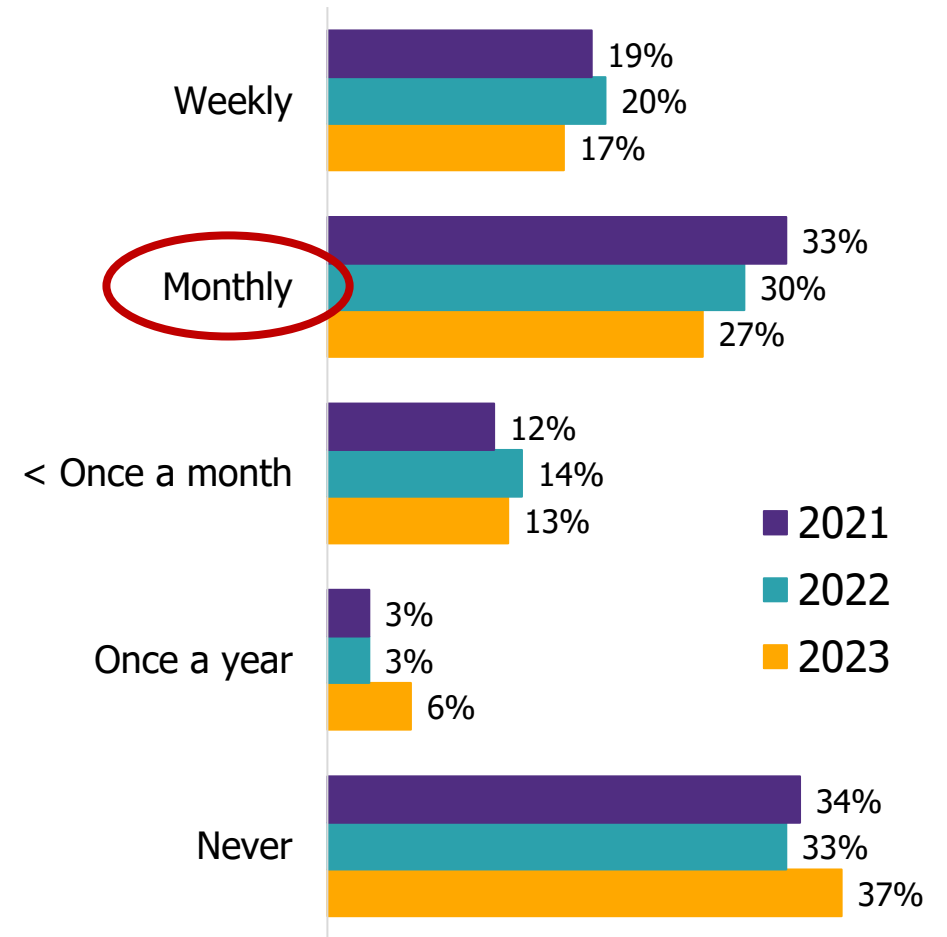
YOY Comparison: Online Grocery Ordering

Consumer-reported use of online ordering for groceries is declining/moderating. Those who do are most likely to use Instacart, the grocery store website/app, DoorDash, & Amazon Fresh.

Consumers Actively Ordering Groceries Online



Frequency of Online Grocery Ordering

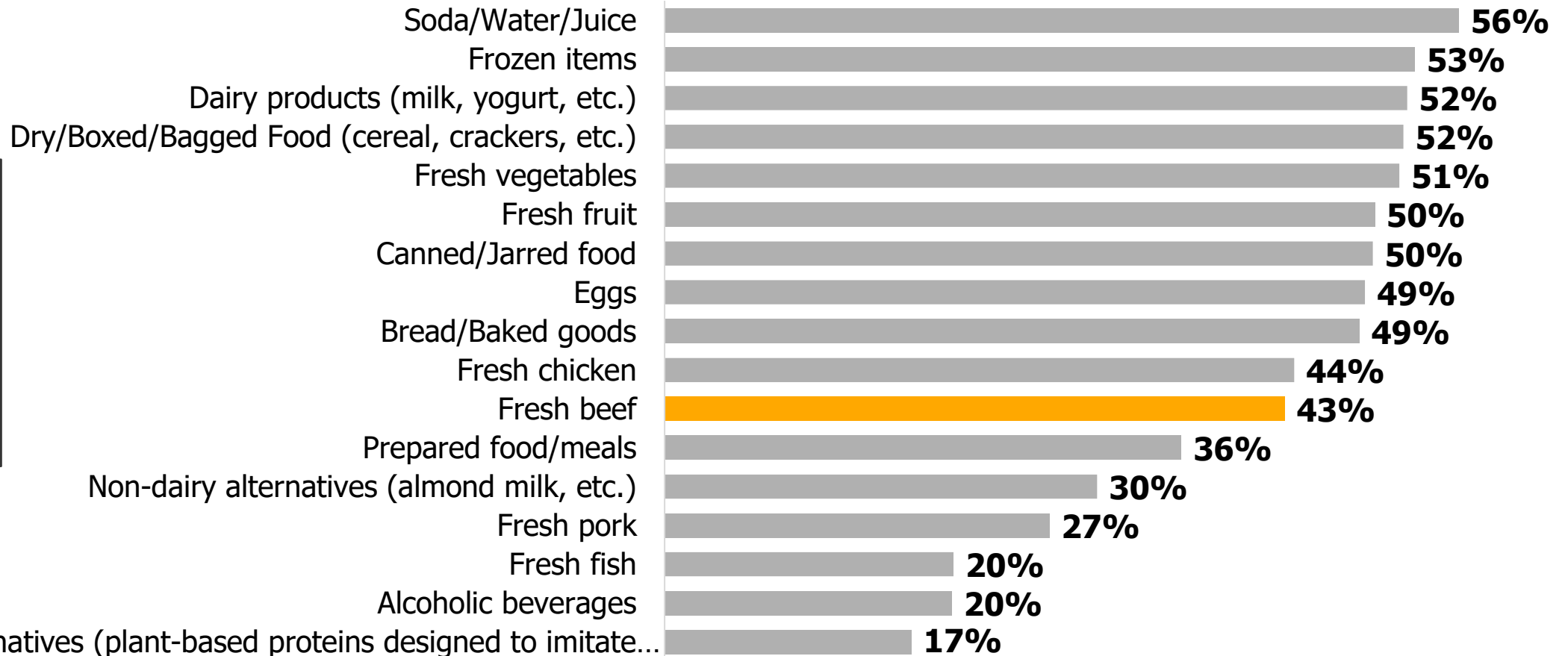


Source: State of Consumer Survey, 2020-2023. How often, if ever, do you order groceries online for pick-up/delivery? Which, if any, of the following online shopping platforms do you actively use to order groceries for pick-up/delivery? Survey designed and analyzed by National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Grocery Categories Purchased Online in the Last Month

Many frequently purchase shelf-stable foods in their online grocery orders and **over 40% have included beef** in these purchases in the last month.

Grocery Categories Purchased Online in the Last Month



Fresh beef in
2023
compared to:
2022: -1%
2021: +2%
2020: +20%

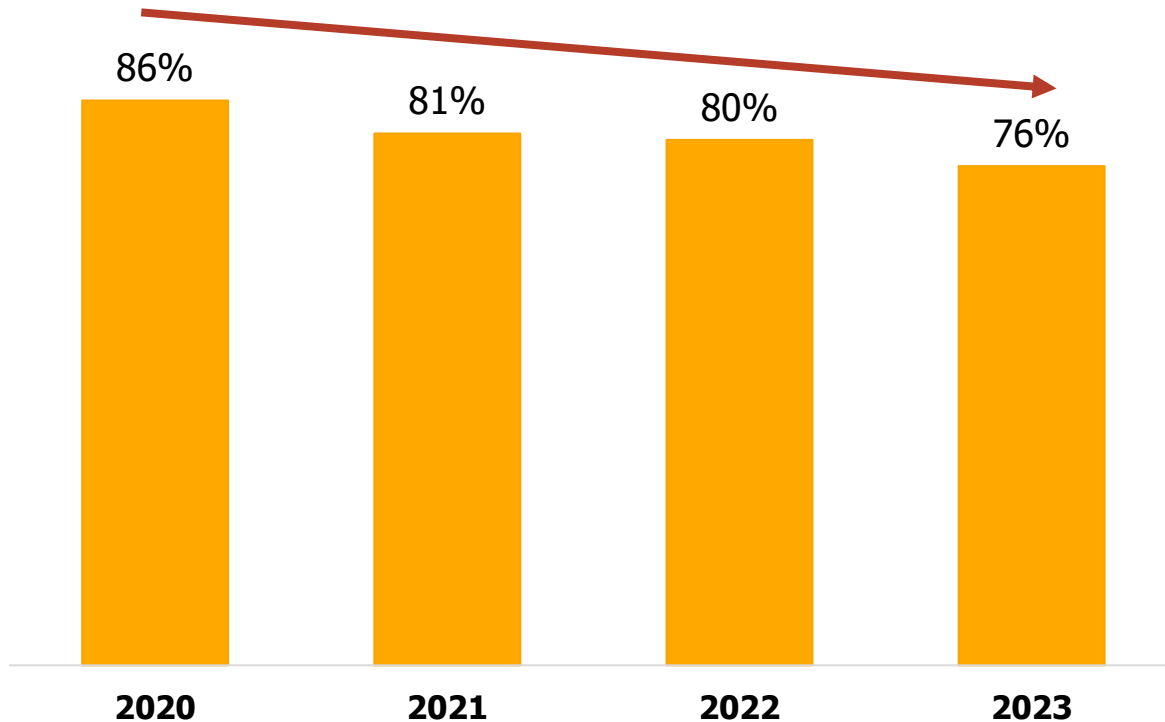
Source: State of Consumer Survey, June 2023, Qualtrics/PureSpectrum, n=746. For each of the following categories of food, which best describes your order history of groceries for pick-up/delivery? (Purchased online in the last month)

Survey designed and analyzed by National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

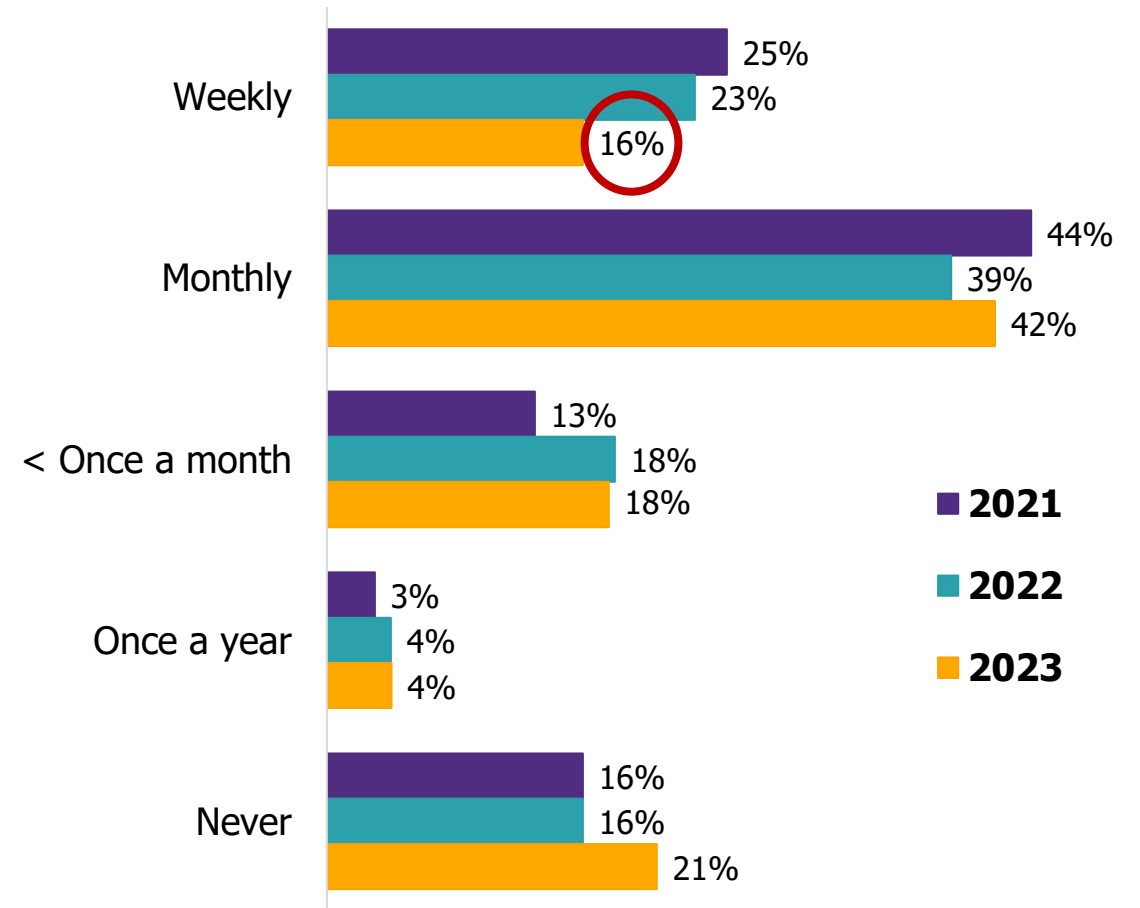
YOY Comparison: Food Service Online Meal Ordering

A majority – but declining proportion – of consumers are ordering meals online to consume at home at least once per month.

Consumers Actively Ordering Food Service Meals Online



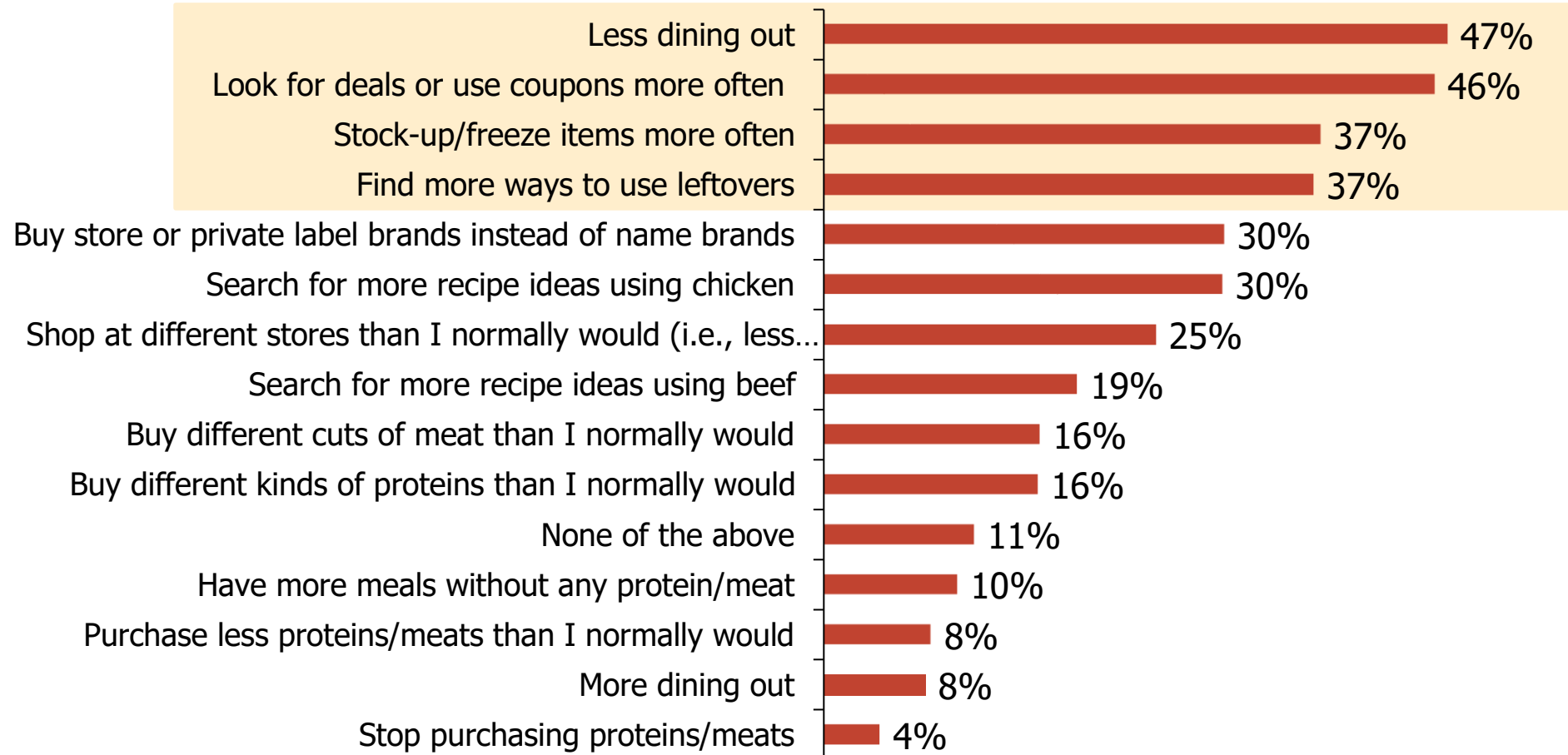
Frequency of Food Service Online Meal Orders



Source: State of Consumer Survey, 2020-2023. How often, if ever, do you order meals from any form of restaurant online/through an app for delivery or pick-up? Survey designed and analyzed by National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Shopping and Dining Habits in the Next 6 Months

In response to inflation, consumers anticipate changing their behavior in the next six months by **dining out less, looking for deals, and stocking up, freezing, or using leftovers more often.**



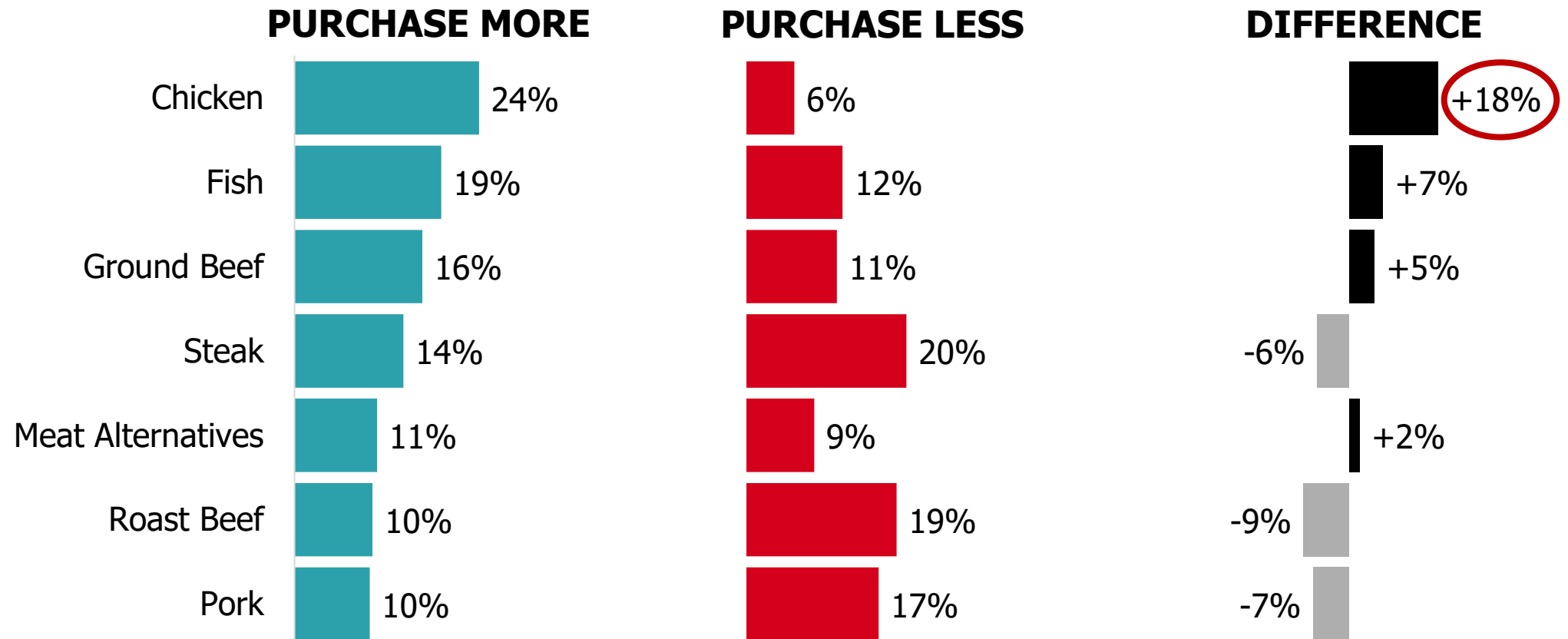
Source: State of Consumer Survey, June 2023, Qualtrics/PureSpectrum, n=1363. Thinking about your current shopping and dining habits, in which ways, if any, do you see them changing in the next 6 months? Select all that apply.

Survey designed and analyzed by National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Plans to Purchase More/Less Compared to 2022 (Proteins Only)

Consumers also indicate they plan to purchase more chicken, more ground beef, and less of more expensive cuts of beef such as steak or roast beef compared to last year.

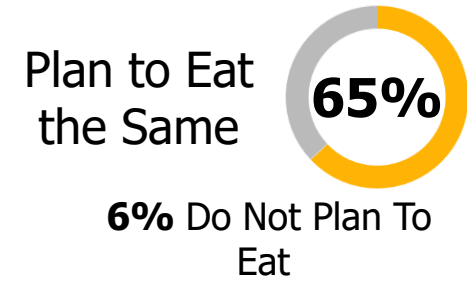
PLAN TO PURCHASE MORE VS. LESS



Source: State of Consumer Survey, June 2023, Qualtrics/PureSpectrum, n=1363. For each of the following items, please select whether you plan to purchase more, less, or the same amount, compared to 2022. Survey designed and analyzed by National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

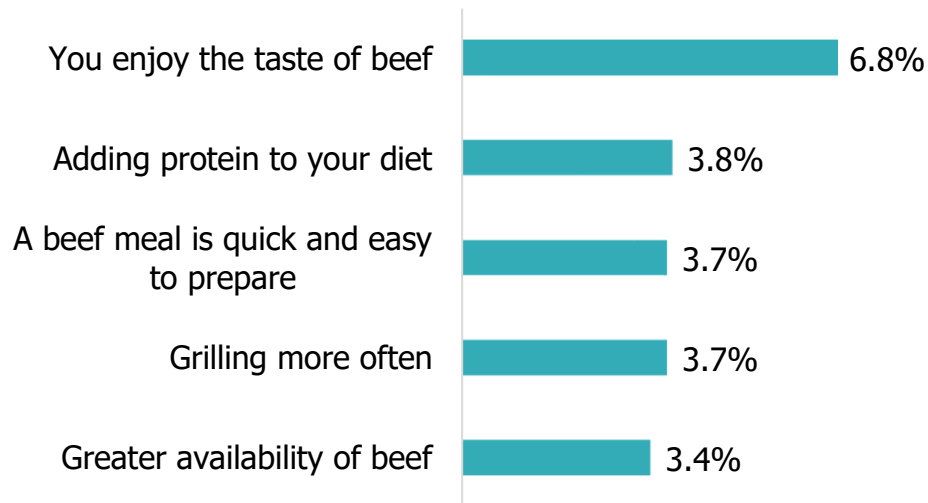
Future Consumption of Beef

65% of consumers plan to maintain their beef consumption levels. Consumers who plan to eat more beef are most motivated by the taste. Of those who plan to eat less beef, price sensitivity and health concerns are the greatest motivators.



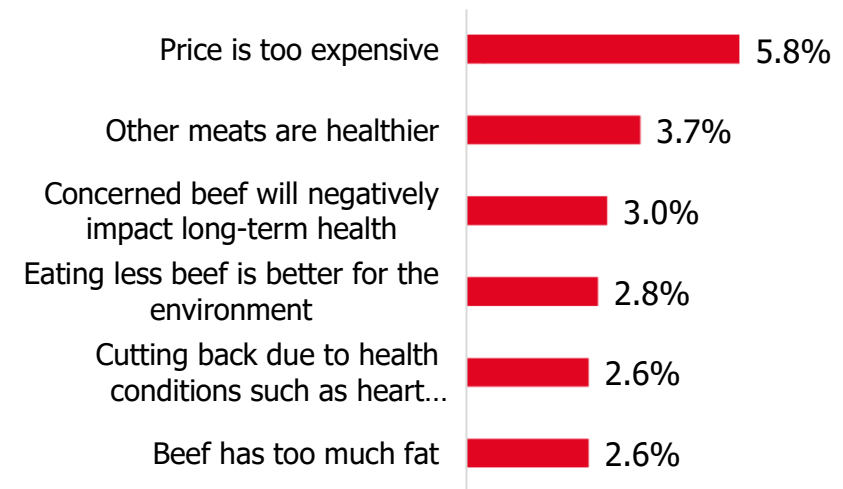
Reasons to Eat More Beef

15%
Plan to Eat More



Reasons to Eat Less Beef

14%
Plan to Eat Less



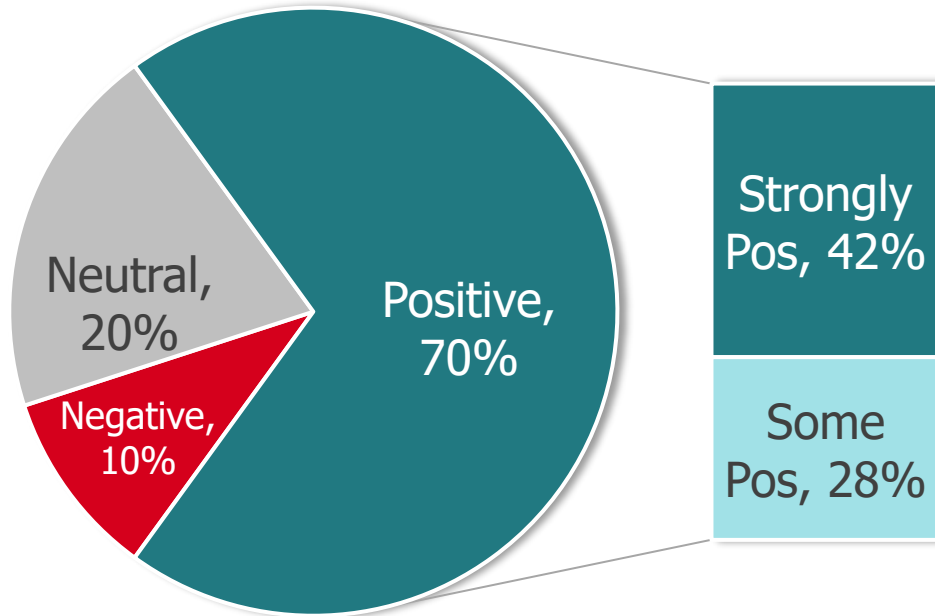
Source: Consumer Beef Tracker January – December 2023. Q13/Q14: "Earlier you mentioned that you plan to eat more/less beef. Which of the following statements are reasons why you plan to eat more/less beef in the future? (Select up to 5 statements)"

Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

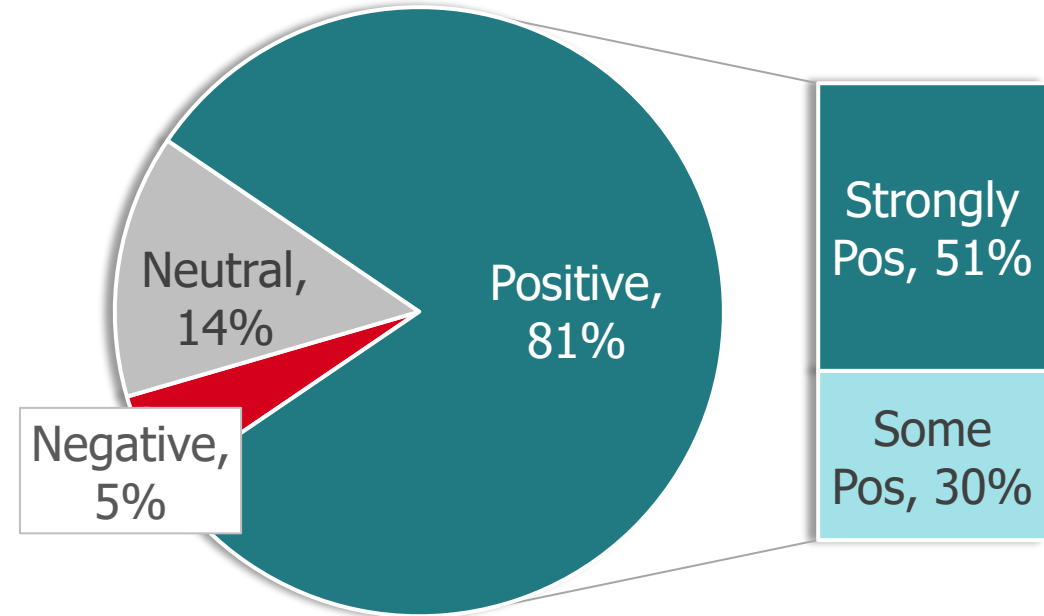
Overall Perceptions

Over two-thirds of consumers have positive perceptions about beef, but chicken still maintains an edge in terms of positive perceptions

Overall Perception of Beef



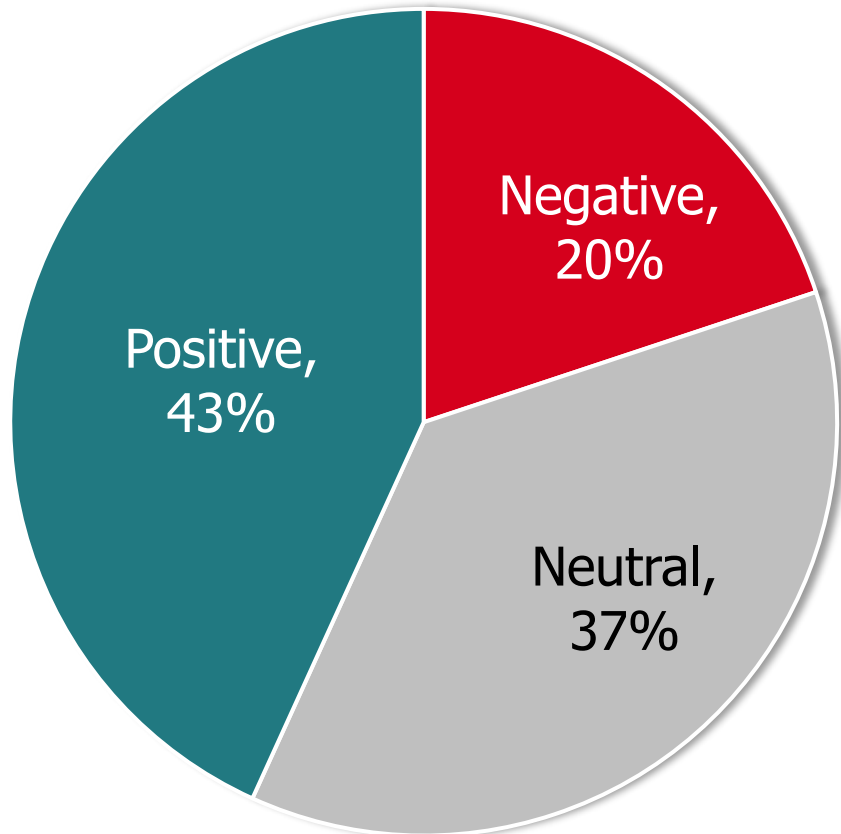
Overall Chicken Perceptions



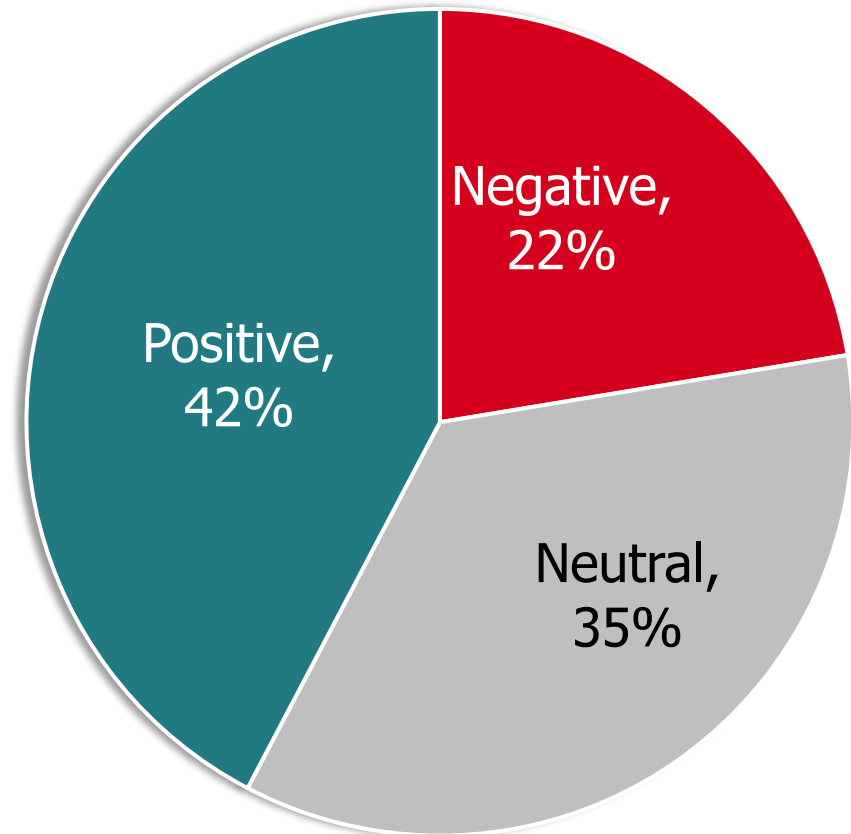
Production Perceptions

Consumer perceptions of production practices of how beef & chicken are raised for food are similar (78-80% neutral to positive).

How Cattle Are Raised For Food

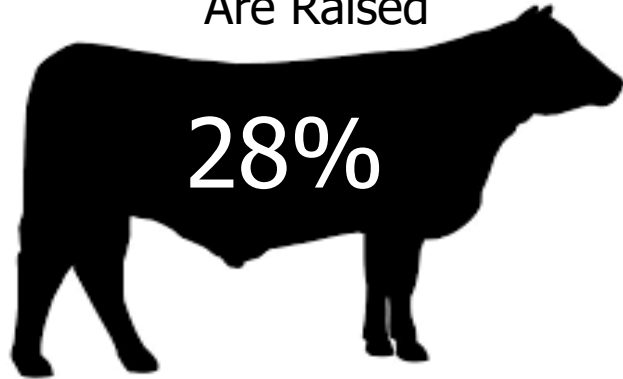


How Chickens Are Raised For Food



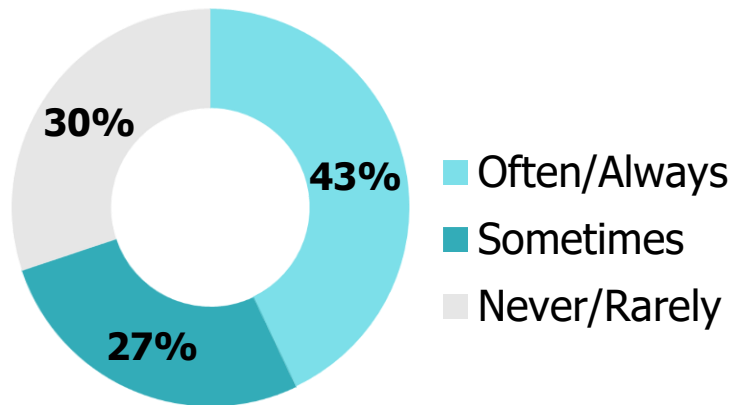
Consumer Production Knowledge

Claim to Know A Lot About How Cattle Are Raised

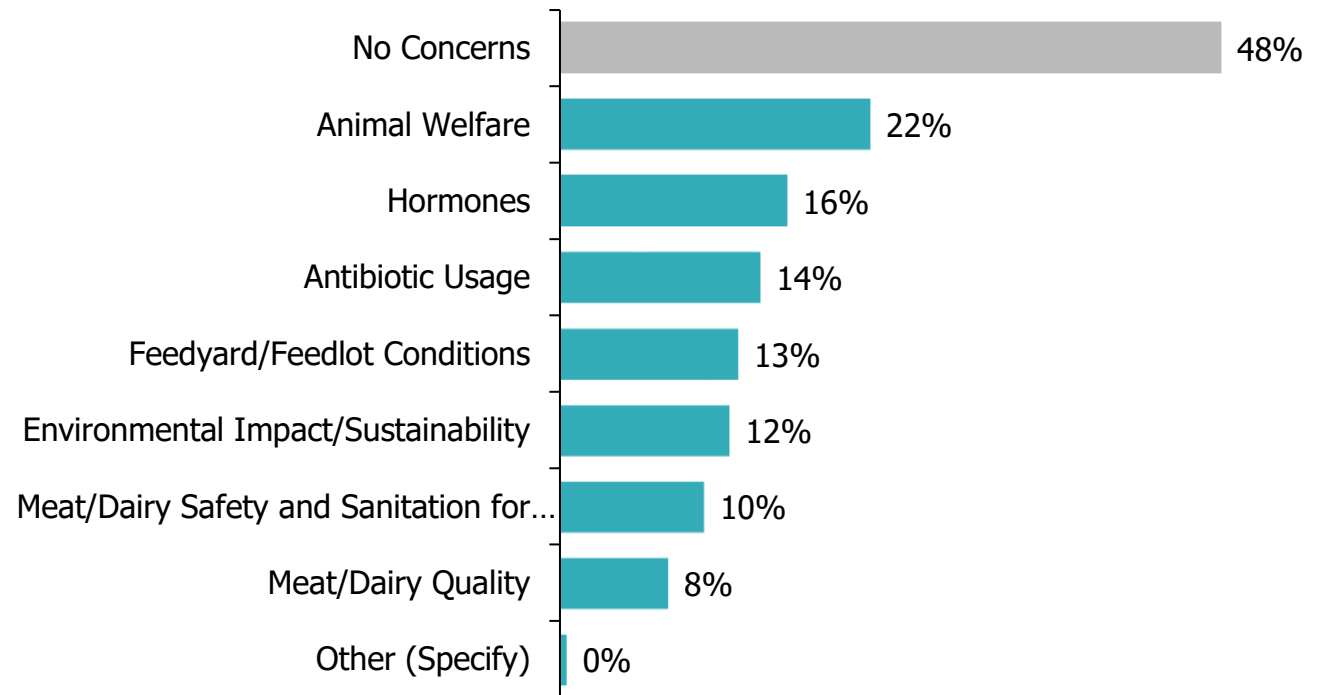


70% say they consider how the food was raised or grown when making purchasing decisions, however, only 28% say they know a lot about how cattle are raised for food. Animal Welfare is the most reported concern.

Consider How Food Was Raised/Grown When Making Purchases



Consumer Concerns with How Cattle are Raised for Food[^]



Source: Consumer Beef Tracker January – December 2023. CR1r1: Please indicate how knowledgeable you are about each of the following.; Q9: How much do you consider each of the following when you are deciding to have a meal at home with beef, chicken, pork, fish, meat alternatives, or some other source of protein.; CR3a: What, if any, concerns do you have about how cattle are raised for food. Please be as specific as possible..

[^]March – December 2023, Analysis: National Cattlemen’s Beef Association, a contractor to the Beef Checkoff.

Thank You.

