DEMAND SCORE & DRIVERS ANALYSIS

2025 UPDATE

BEEF RESEARCH

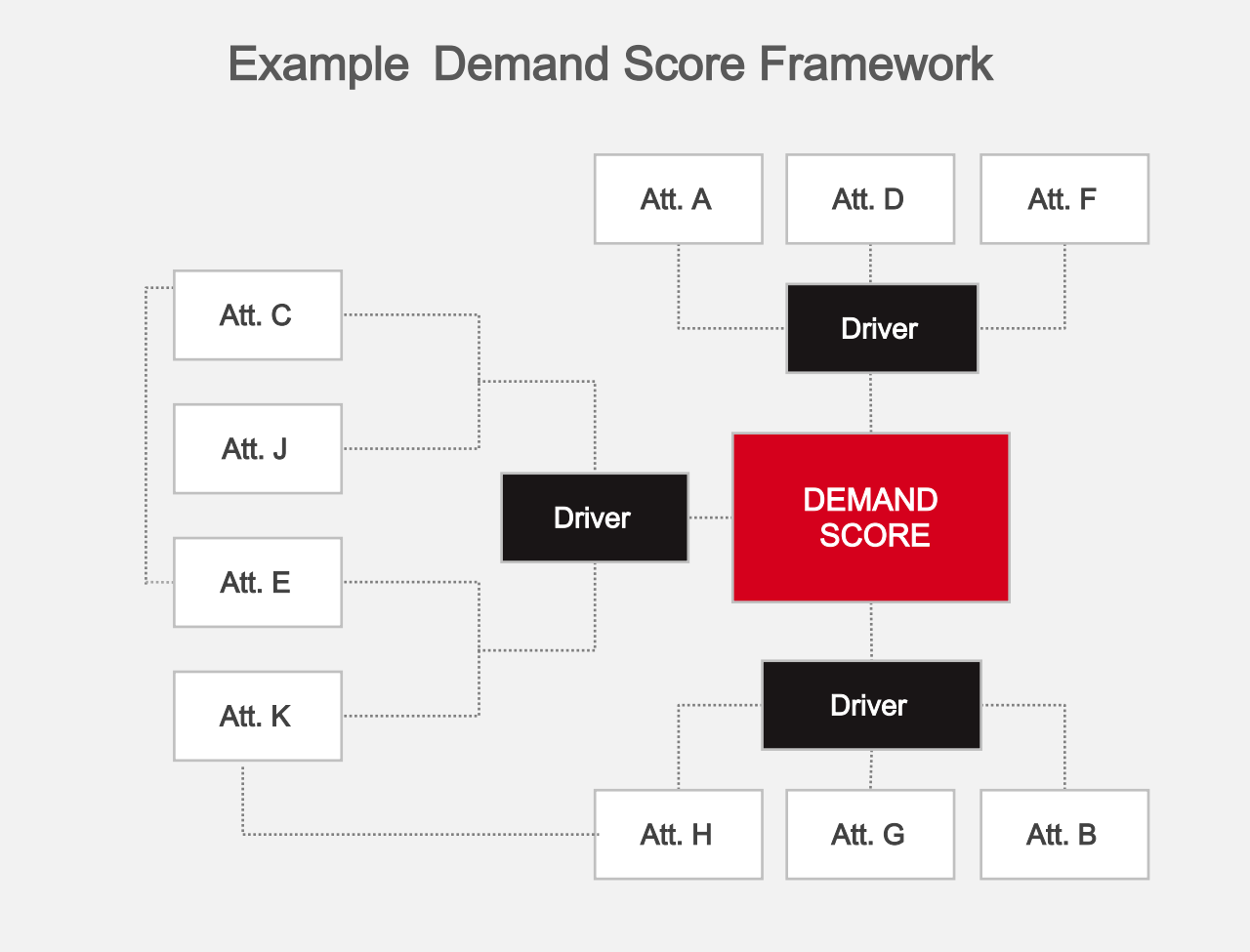
BEEF

Funded by the Beef Checkoff

DEMAND SCORE MODELING

There are a number of models for measuring brand health & equity, most of which use a combination of factoring, laddering & regression techniques.

- Decomposing various dimensions through multi-variate regression techniques enables the understanding of what is “driving” these metrics at a more granular level.
- Multi-variate statistical tools are used to determine the importance of drivers and key indicators.



DEMAND SCORE MODELING GLOSSARY

DEMAND SCORE INDEX

The Demand Score Index summarizes the overall behavioral intent toward a protein specific to how consumers stated past behavior (frequency and preference) and willingness to pay more for relate to that protein.

This score is a relative index and hence is read relative to the category average.

CONSUMPTION INDEX

The Consumption Index indicates how frequently consumers claim to consume the protein.

This score is a relative index and hence is read relative to the category average.

PREFERENCE INDEX

The Preference Index indicates the consumer preference of the protein compared to other proteins, the willingness to chose a protein over others.

This score is a relative index and hence is read relative to the category average.

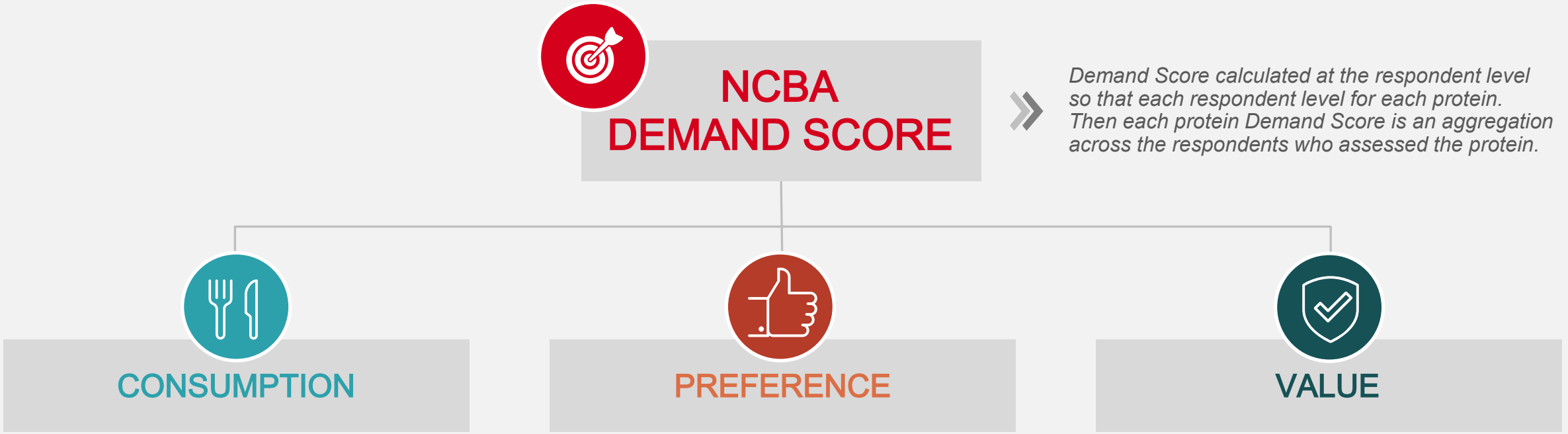
VALUE INDEX

The Value Index indicates the consumers' willingness to pay more for the protein and hence measures the inherent value of the protein relative to how much they are expected to pay for it.

This score is a relative index and hence is read relative to the category average.

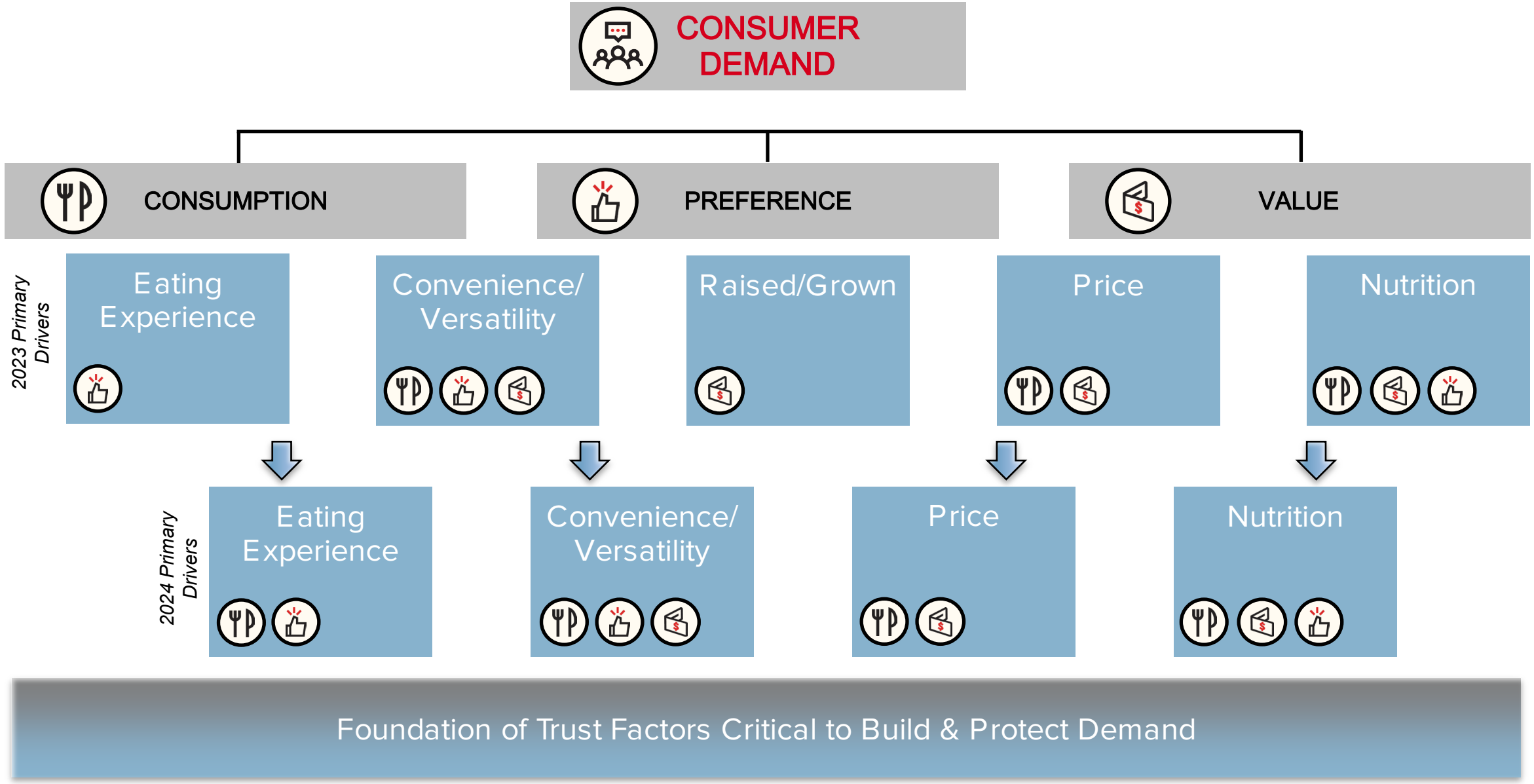
NCBA DEMAND SCORE OVERVIEW

The NCBA Demand Score is comprised of three overarching inputs:



The Demand Score and its components are expressed as an index, where 100 is the average across all proteins evaluated.

CONSUMER SELF PERCEIVED DEMAND DRIVERS – NEW FOR 2025 *(based on 2024 data)*



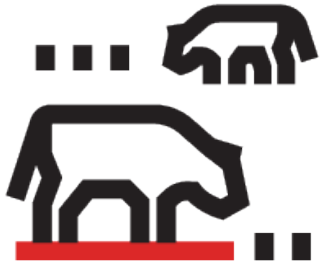
Source: Demand Drivers Report January 1, 2023 – December 31, 2024; N=12000. Independent analysis of self-reported consumer data, commissioned by the National Cattlemen's Beef Association, a contractor to the Beef Checkoff

Foundation of Trust Factors Critical to Build & Protect Demand

Embrace Innovation to Improve Quality, Safety and Animal Well Being

Nutritious, Safe to Eat
No impact on Long-term Health

Safety Continually Monitored & Sanitation Guidelines Followed



Grass Part of Diet &
Room to Roam/Health a Priority

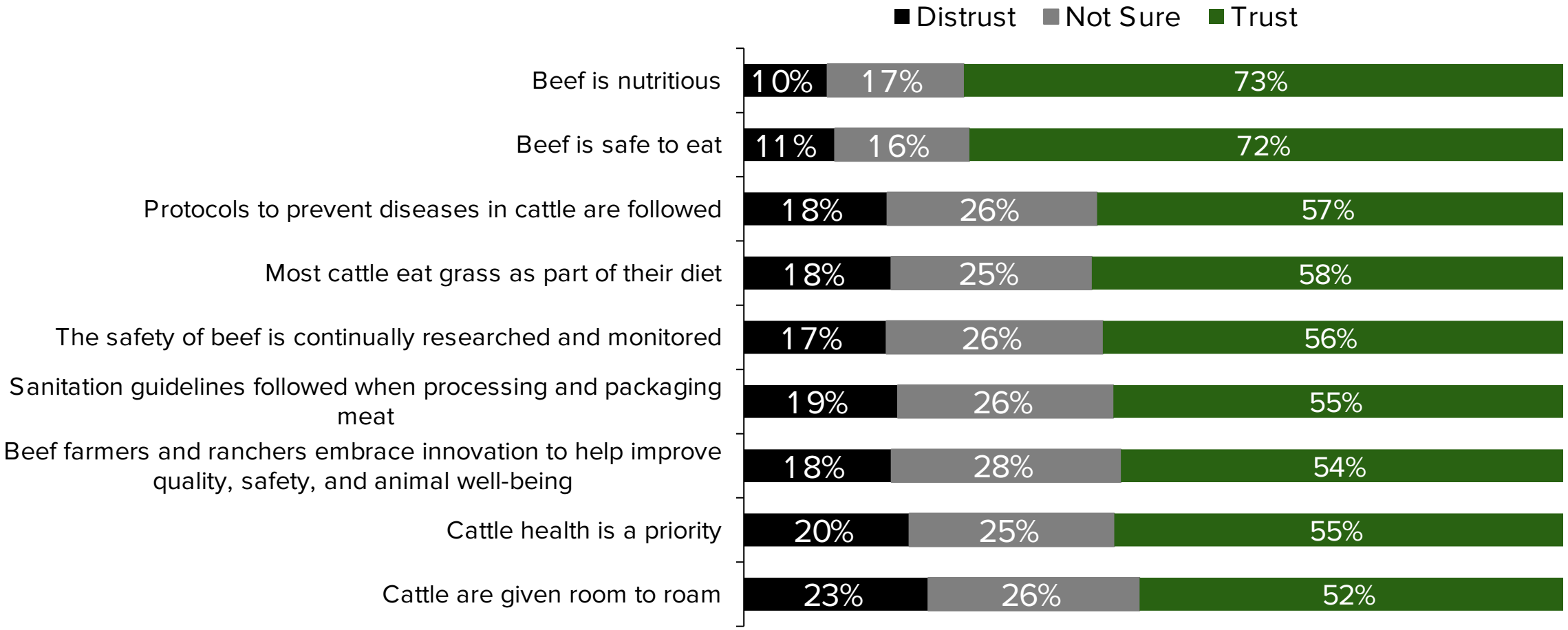
Disease Prevention, Ethical Practices & Treated Humanely

Care for the Environment & Protect/Conserve Water

Source: Consumer Beef Tracker January – December 2024. CR4: "Thinking about how cattle are raised for food in the U.S., please tell us how much you trust each of the following statements."
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Trust Metrics: How Cattle are Raised for Food: 2024 (Part One)

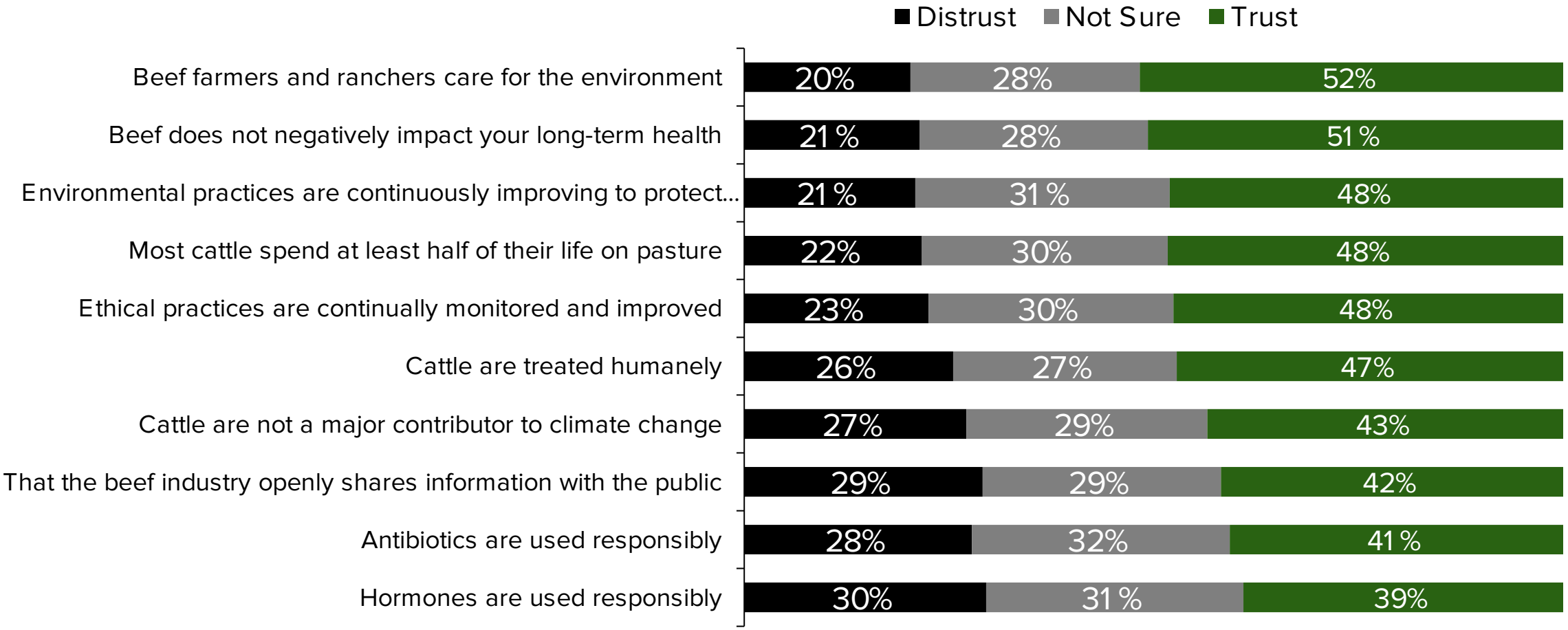
Nearly three-quarters of consumers trust beef is nutritious and safe to eat.



Source: Consumer Beef Tracker January – December 2024. CR4: "Thinking about how cattle are raised for food in the U.S., please tell us how much you trust each of the following statements."
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Trust Metrics: How Cattle are Raised for Food: 2024 (Part Two)

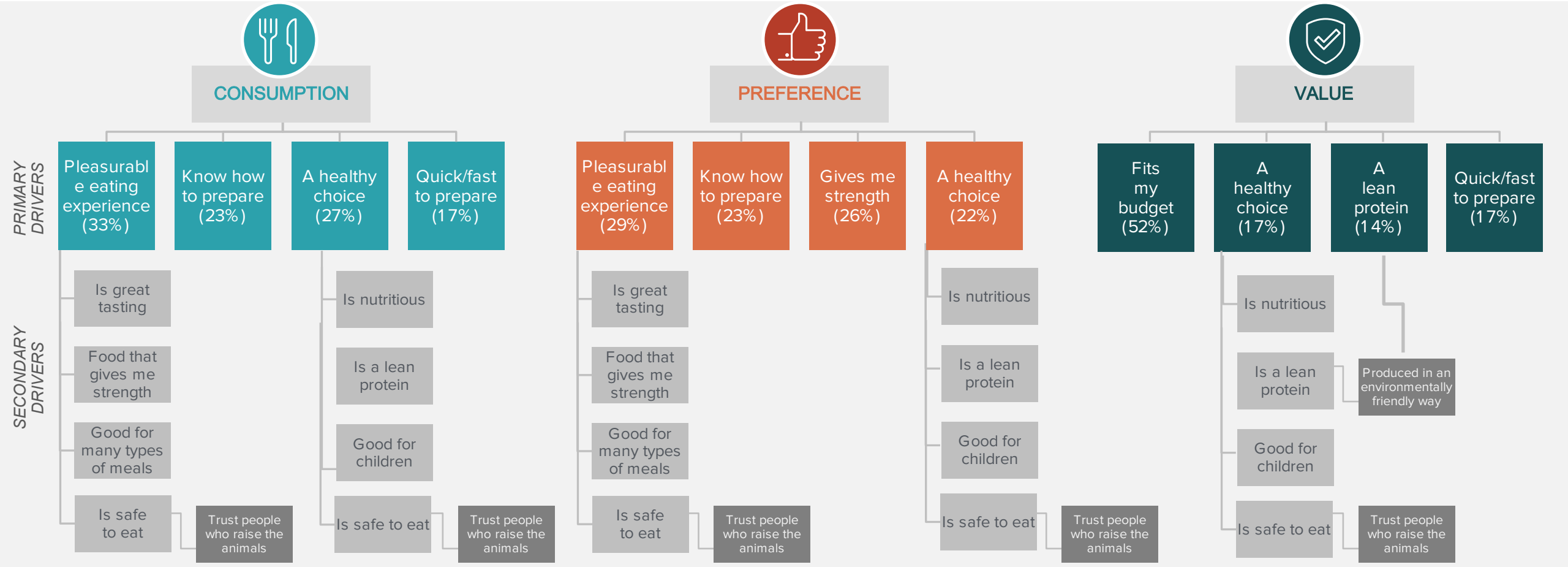
Less than half of consumers express confidence in how antibiotics and hormones are used in beef production.



Source: Consumer Beef Tracker January – December 2024. CR4: "Thinking about how cattle are raised for food in the U.S., please tell us how much you trust each of the following statements."
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

COMPONENT DRIVERS – NEW FOR 2025 *(Based on 2024 data)*

Know how to prepare – consumers may want to ensure they can properly prepare a meal that won't be wasted, with a greater focus on simplicity and value.



Component Driver modeling based on data collected January 2024 – December 2024.

Component Drivers (Ranked 1st)

Beef holds an advantage over Chicken on four of seven primary component drivers in 2024 – eating experience, preparation attributes and providing strength.

		Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Q2 '22	Q3 '22	Q4 '22	Q1 '23	Q2 '23	Q3 '23	Q4 '23	Q1 '24	Q2 '24	Q3 '24	Q4 '24
PRIMARY DRIVERS	Pleasurable eating experience	26%	29%	28%	27%	28%	28%	30%	29%	27%	27%	25%	27%	27%	24%	24%	28%
	Know how to prepare it	14%	20%	17%	19%	15%	17%	19%	19%	17%	12%	12%	16%	15%	15%	8%	17%
	A healthy choice	-13%	-13%	-13%	-10%	-17%	-13%	-16%	-17%	-18%	-16%	-19%	-17%	-16%	-17%	-22%	-18%
	Quick/fast to prepare	9%	9%	6%	11%	10%	7%	6%	2%	3%	11%	3%	6%	5%	6%	2%	7%
	Food that gives me strength	28%	27%	23%	27%	22%	26%	25%	24%	21%	23%	25%	21%	25%	20%	19%	24%
	Fits my budget	-17%	-18%	-19%	-13%	-21%	-17%	-17%	-20%	-17%	-17%	-23%	-19%	-20%	-18%	-24%	-18%
	A lean protein	-16%	-12%	-12%	-10%	-17%	-13%	-19%	-15%	-19%	-19%	-23%	-18%	-17%	-19%	-22%	-17%
SECONDARY DRIVERS	Great tasting	28%	26%	29%	27%	27%	27%	26%	32%	29%	22%	26%	28%	29%	23%	24%	27%
	Nutritious	7%	1%	5%	7%	0%	1%	1%	6%	-2%	-2%	0%	3%	3%	2%	-4%	1%
	Good for young children	-9%	-16%	-8%	-5%	-10%	-8%	-11%	-12%	-18%	-12%	-12%	-12%	-11%	-11%	-16%	-10%
	Good for many types of meals	12%	8%	12%	11%	7%	7%	10%	11%	6%	3%	2%	6%	9%	4%	1%	4%
	Safe to eat	16%	19%	16%	17%	17%	18%	17%	16%	12%	15%	16%	20%	19%	14%	13%	19%

Beef vs. Chicken Gap Analysis

Beef Ranked Higher

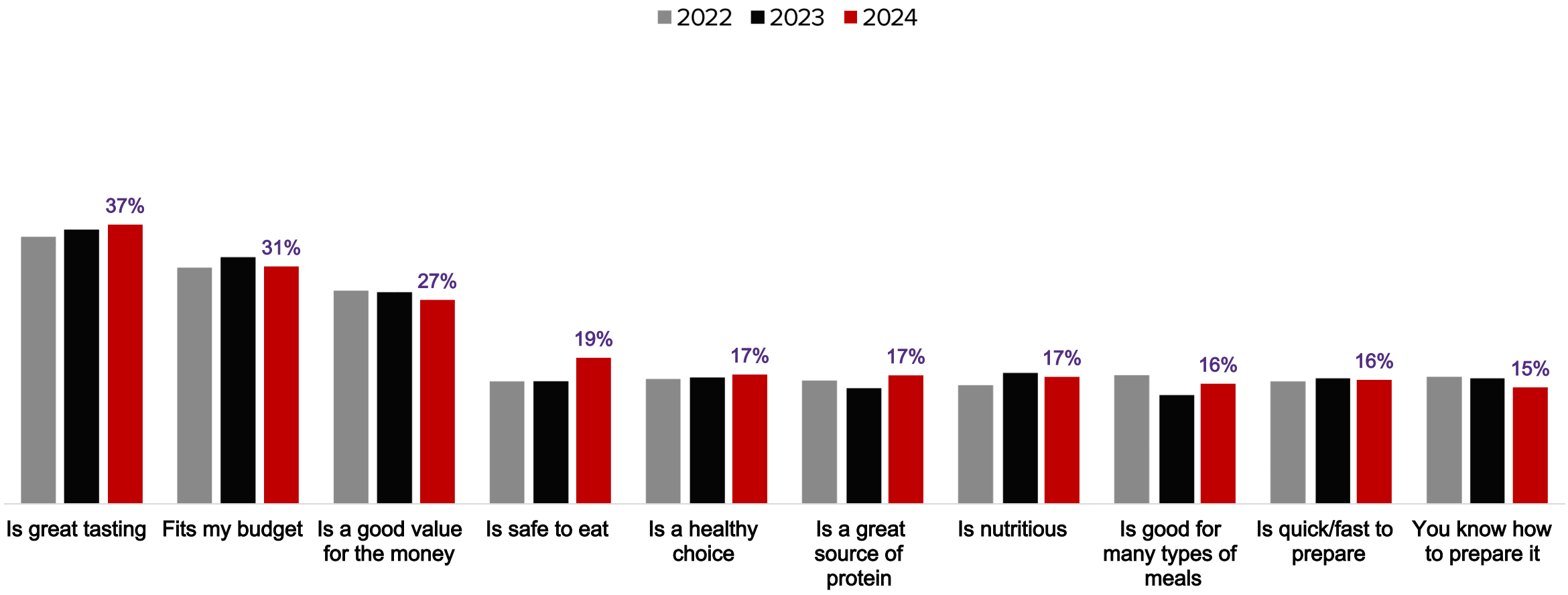
Chicken Ranked Higher

Consumption Preference Value

Source: Demand Drivers Report January 1, 2023 – December 31, 2024; N=12,000. Independent analysis of self-reported consumer data, commissioned by the National Cattlemen's Beef Association, a contractor to the Beef Checkoff

TOP 3 CONSIDERATIONS FOR PROTEIN AT HOME

Taste, budget, and perceived value are most important to consumers when choosing a meal with protein at home.



Source: Consumer Beef Tracker 2022 – 2024. Q10a: Now we would like you to choose the top 3 factors that you most consider when deciding to have a meal at home with beef, chicken, pork, fish, meat alternatives or some other source of protein. Remember, you may only choose 3 attributes
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Thank You.

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