



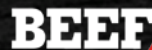
BEEF.
IT'S WHAT'S FOR DINNER.®



BEEF
RESEARCH

Consumer Insights

National Cattlemen's Beef Association, a
contractor to The Beef Checkoff

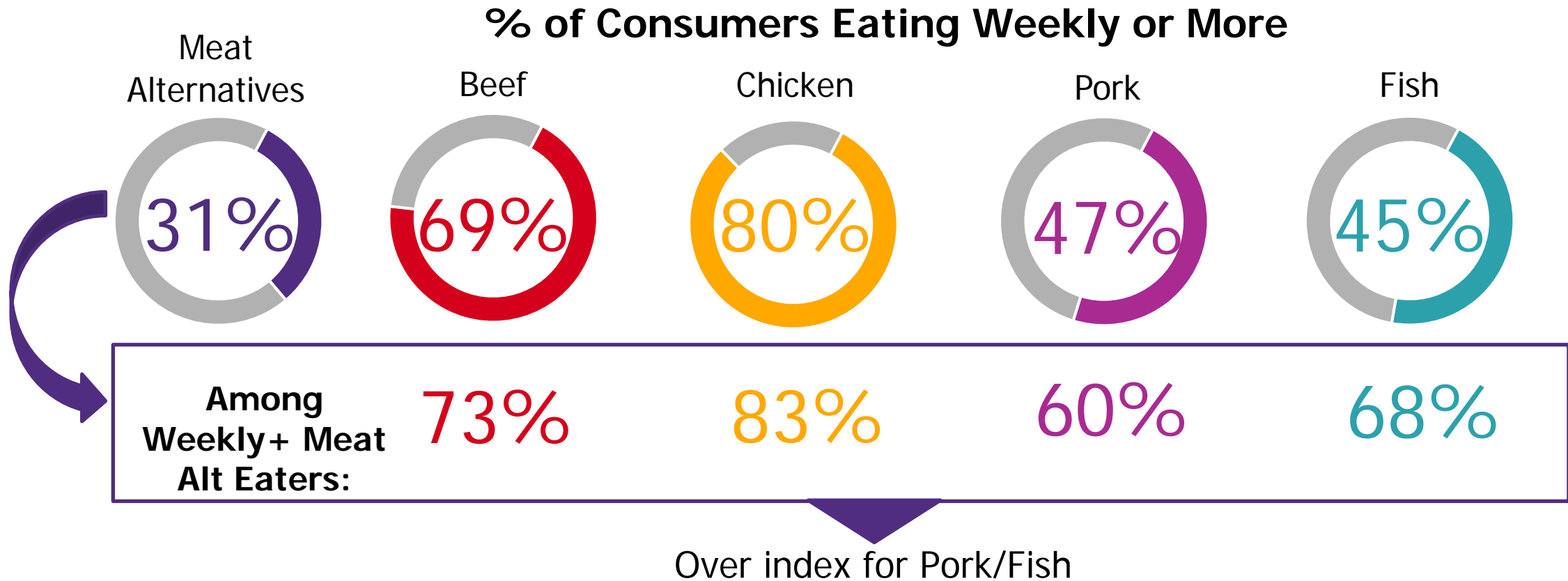


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Funded by the Beef Checkoff

Consumption of Protein

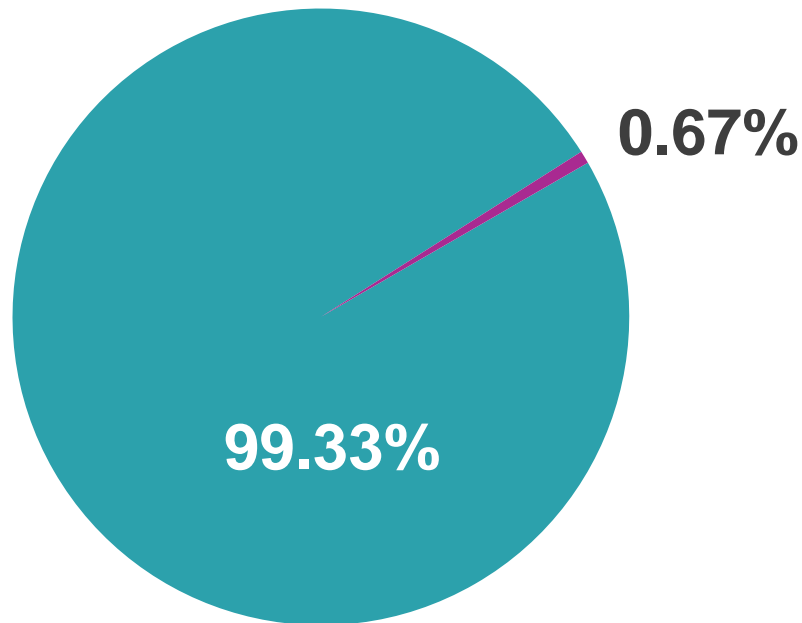
Frequent meat alternative consumers are eating a variety of other meat proteins including beef



2021 - Meat and Beef Substitutes Own Little Market Share

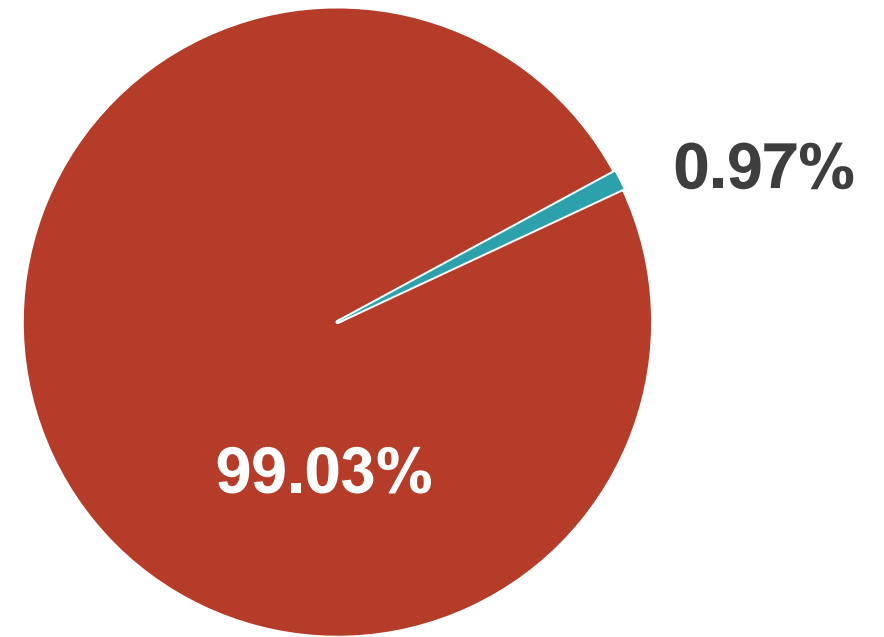
While protein substitutes continue to grow, the market share is small

Animal Proteins vs. Substitutes



■ All Animal Proteins ■ AP Substitutes

Beef vs. Beef Substitutes

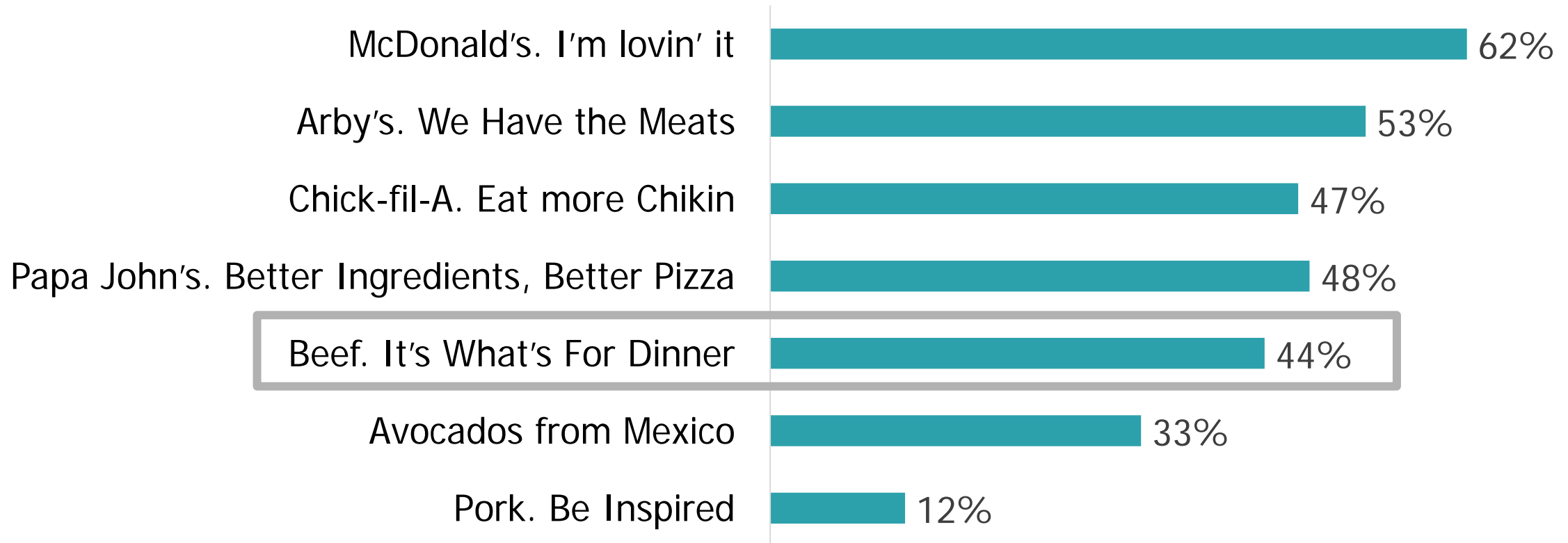


■ Beef ■ Beef Substitutes

Awareness

Compared to other higher budget brands, BIWFD performs well

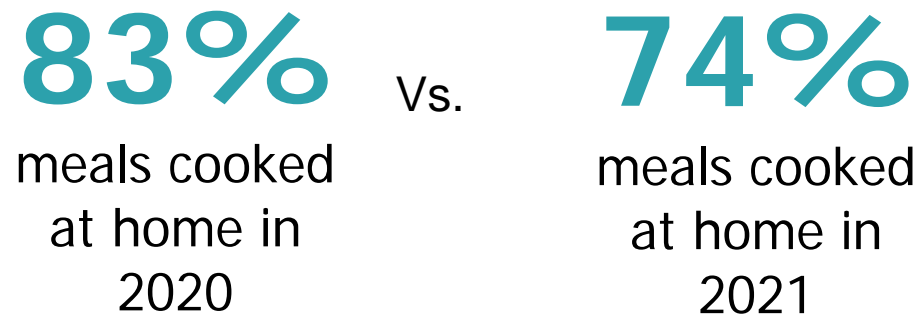
Comparison of Aided Awareness



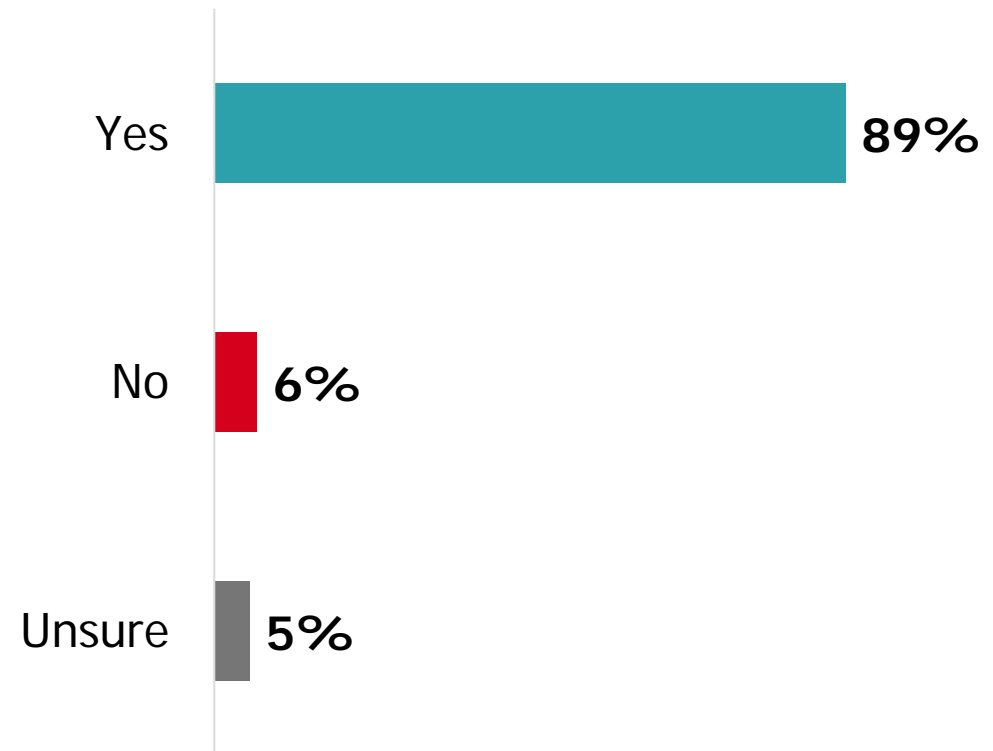
At Home Eating

Nearly three quarters of consumers are cooking meals at home

Percentage of Meals Cooking At Home



Will You Continue to Cook More Meals at Home?



Thinking about the number of meals you are currently cooking at home, what percentage of your meals do you think you are cooking at home?
Is [insert percentage] of meals cooked at home more, less or the same as 6 months ago?
Do you expect to continue cooking more meals at home? (n=477)

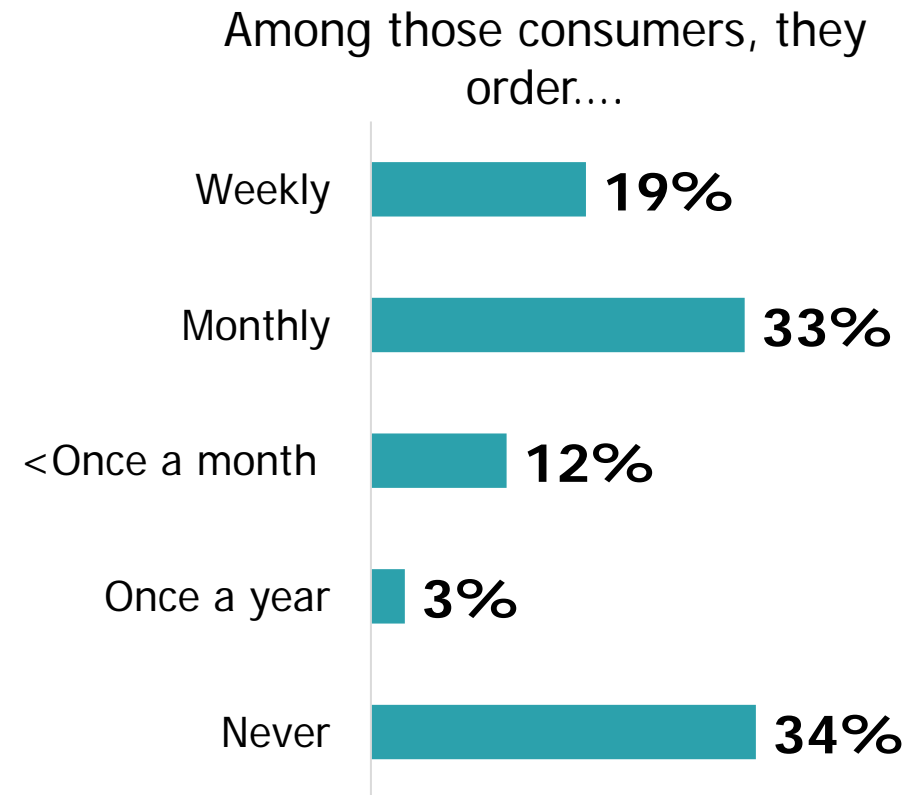
Source: Beef Behavior and COVID Report, April 2020

Source: State of Consumer Survey, Dynata Platform, July 2021

Online Grocery Ordering

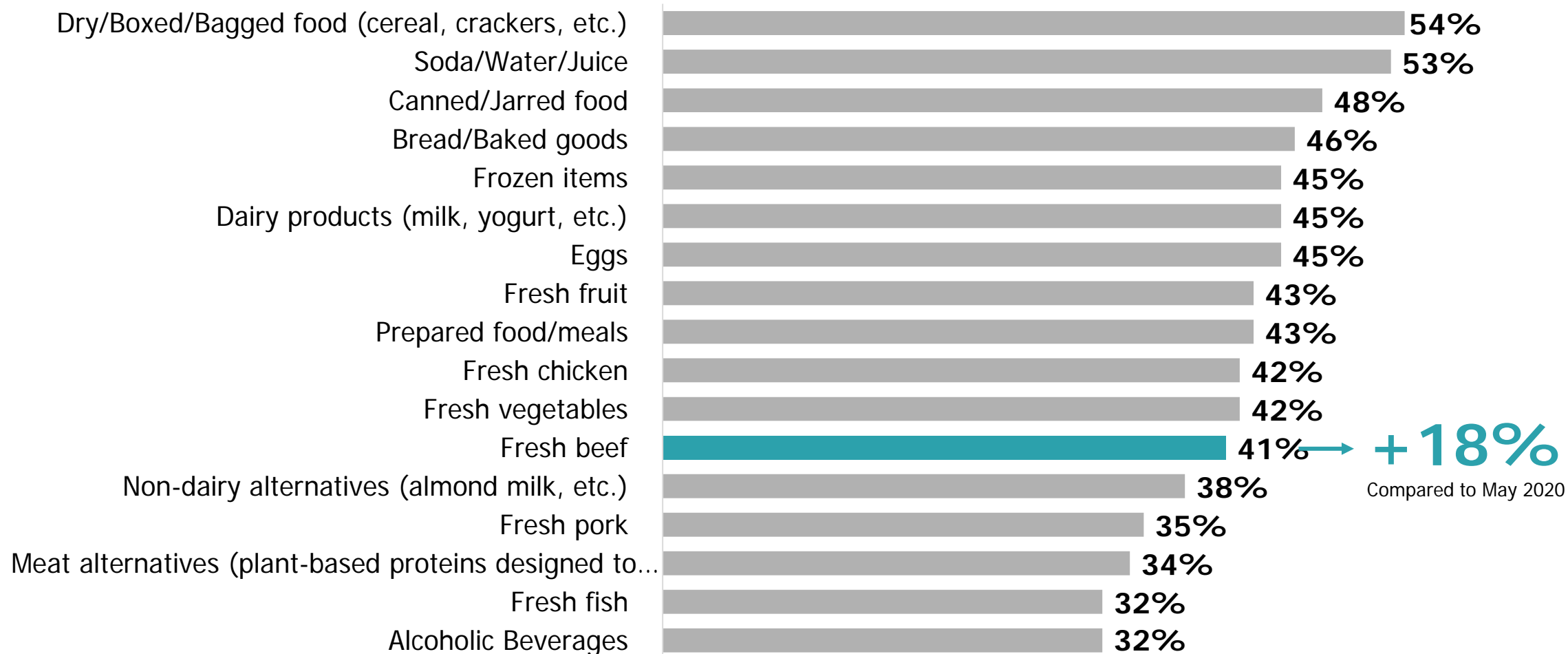
Over a half of consumers are ordering groceries online, with a third of those being at least monthly

63% Of consumers are actively ordering groceries online



Categories Purchased

Over 40% of consumers are purchasing beef when ordering groceries

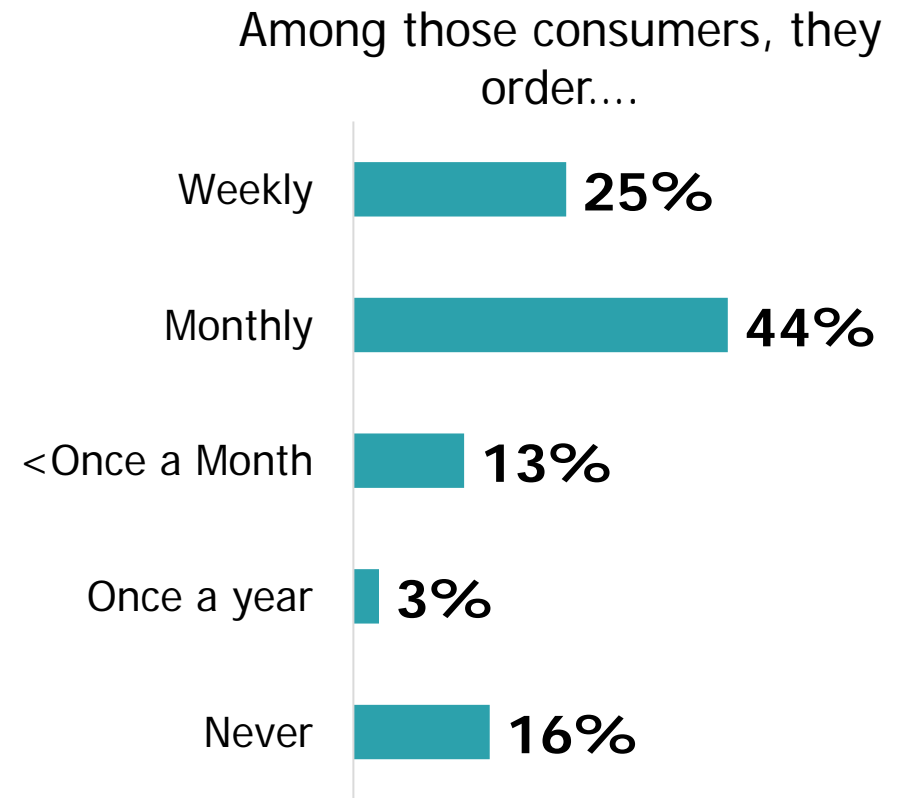


Compared to May 2020

Online Meal Ordering

The number of consumers ordering meals online is high, with a quarter doing so on a weekly basis

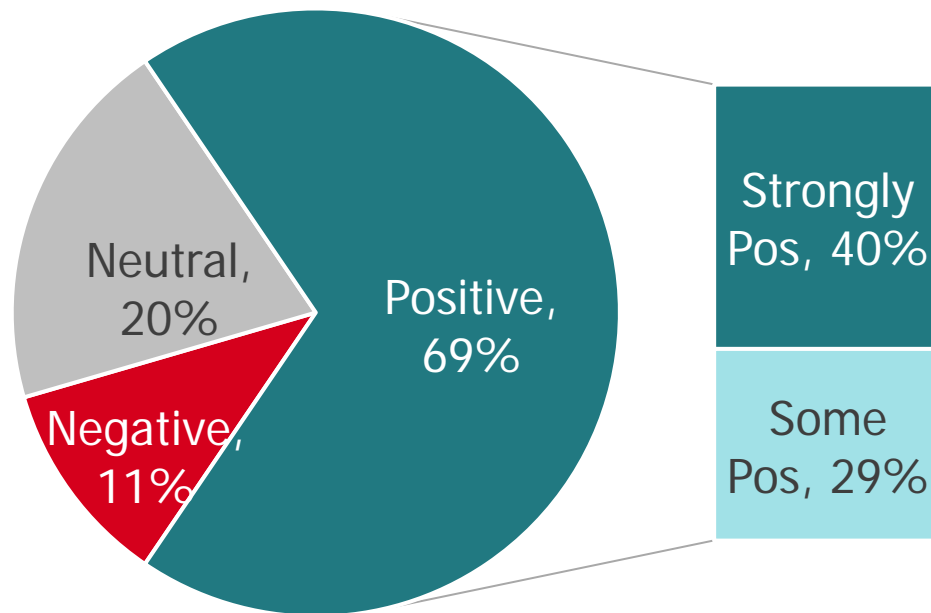
81% Of consumers
are actively ordering meals online



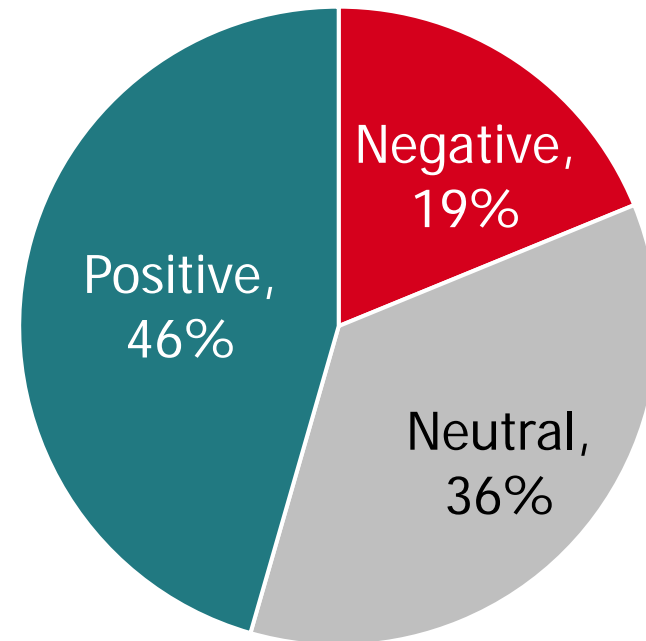
Overall Perceptions

Over two-thirds of consumers are positive about beef and almost half are positive about beef production

Overall Beef Perceptions



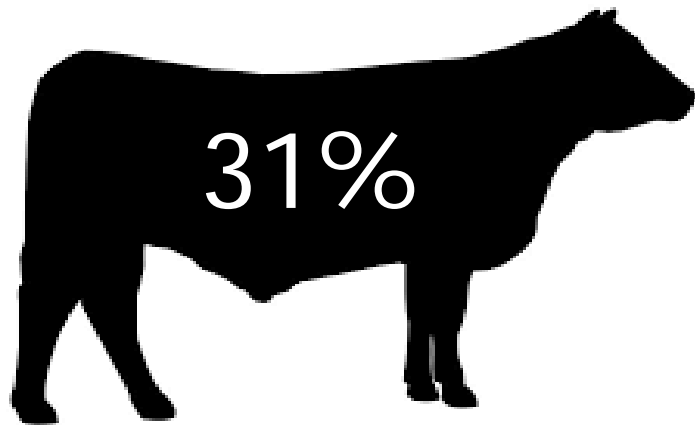
Beef Production Perceptions



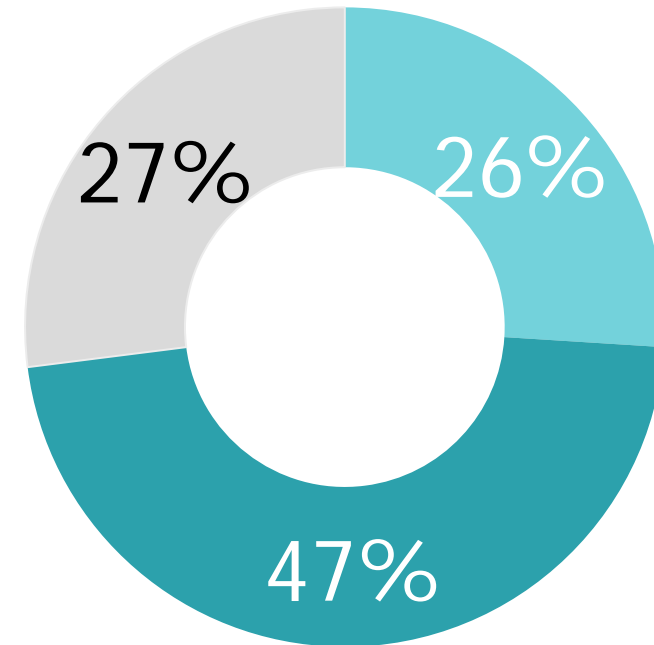
Consumer Knowledge

Consumers are unfamiliar with how cattle are raised, but consider this aspect when choosing a protein

Familiarity with How Cattle are Raised



Consider How Food Was Raised/Grown



■ Sometimes ■ Often/Always ■ Never/Rarely



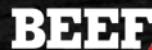
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