



# Consumer Insights

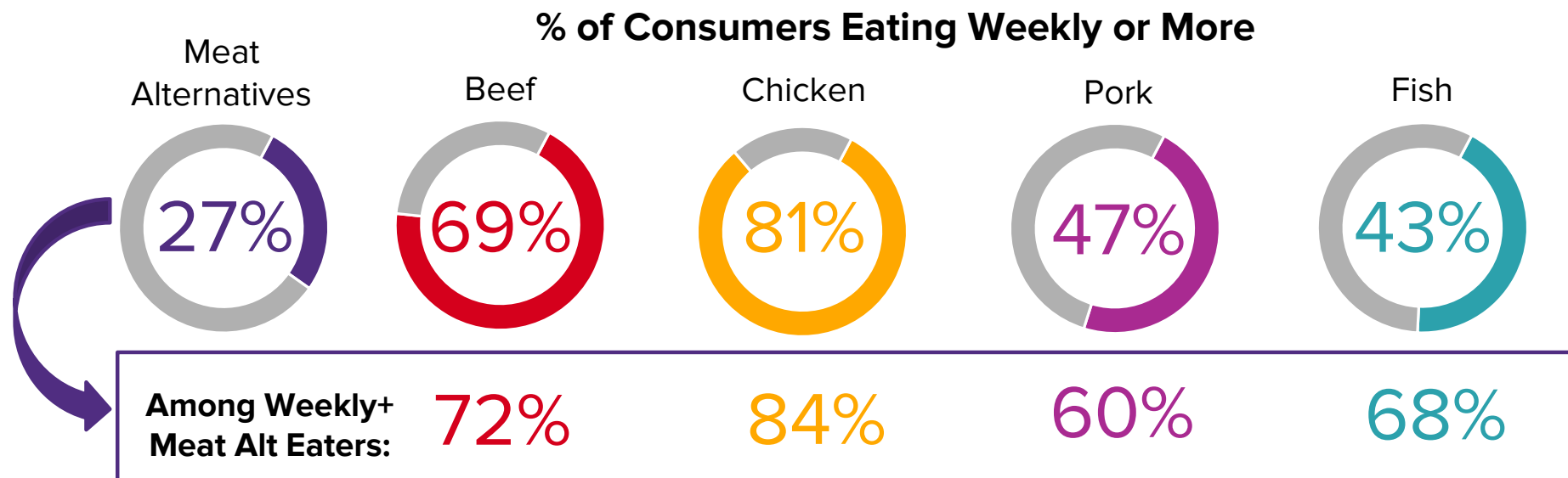
National Cattlemen's Beef Association  
a contractor to The Beef Checkoff



Funded by Beef Farmers and Ranchers

# Consumption of Protein

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.

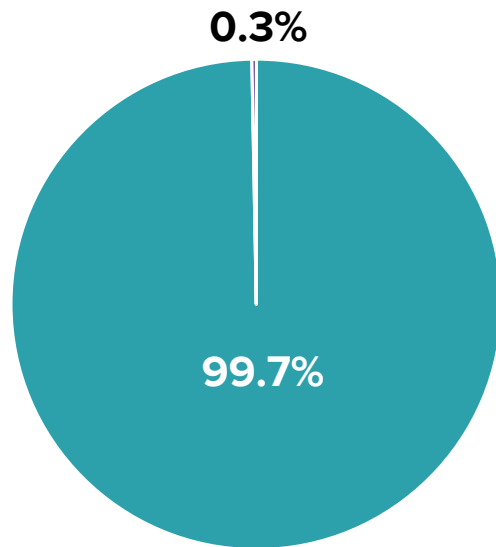


Source: Consumer Beef Tracker Jan – Dec 2022. Q1: Thinking about all your meals – breakfast, lunch, dinner and snacks – how frequently do you eat each of the following types of foods?  
Analysis: National Cattlemen’s Beef Association, on behalf of The Beef Checkoff.

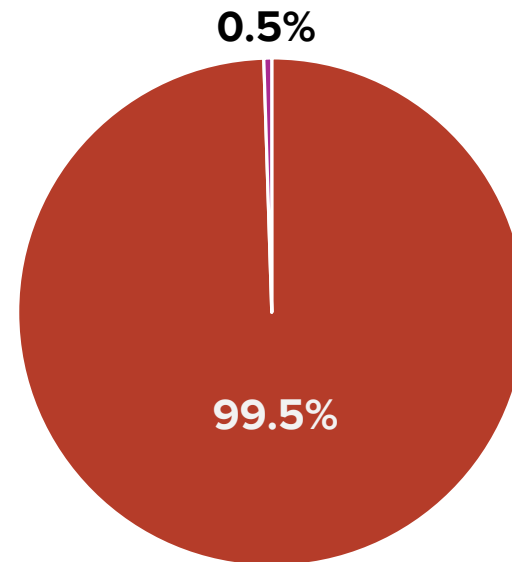
# Market Share of Fresh Meat and Beef Substitutes

Meat and beef substitutes represent a small percentage of the fresh meat and beef markets.

Fresh Animal Protein vs. Substitutes



Fresh Beef vs. Beef Substitutes



■ All Animal Proteins ■ AP Substitutes

■ Beef ■ Beef Substitutes

*Note: Beef substitute forms include chubs, ground, and patties. Animal protein constitutes beef, bison, chicken, fowl, lamb, pork, turkey, and veal. Only fresh products were included in calculations.*

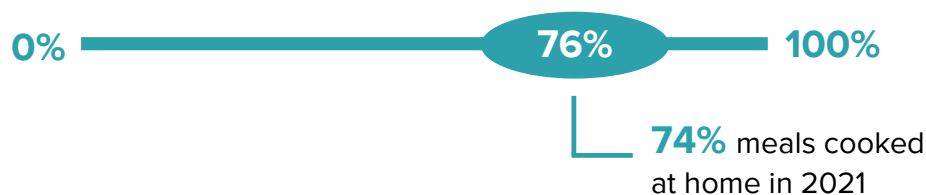
*Source: NielsenIQ, Discovery. 2022 Retail Protein Sales ending 12/31/2022.*

*Analysis: National Cattlemen's Beef Association, on behalf of The Beef Checkoff.*

# At Home Eating

Over three quarters of meals are being cooked at home and those who are cooking more at home plan to continue doing so

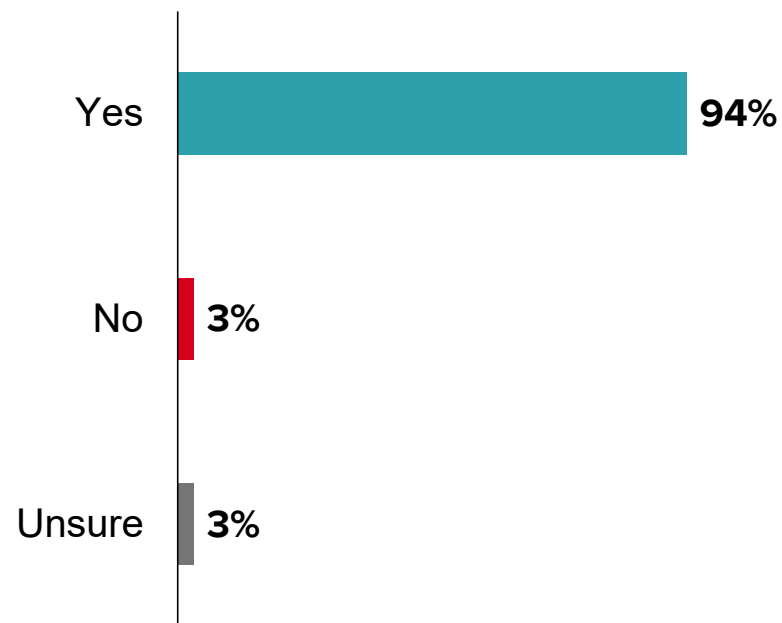
Percentage of Meals Cooked At Home



Change in At-Home Cooking Behavior



Will You Continue to Cook More Meals at Home?

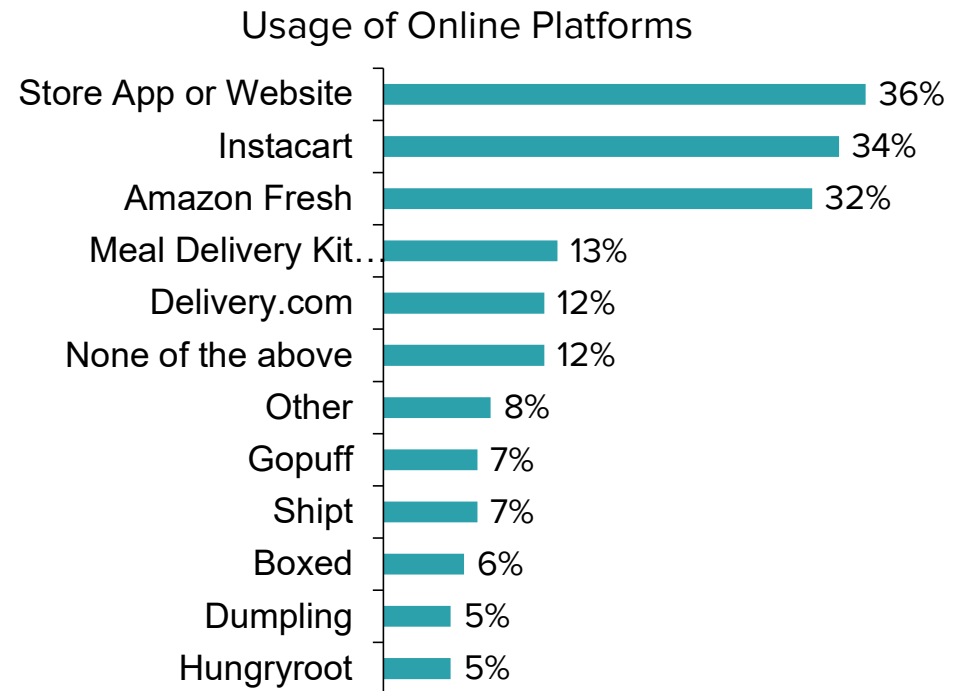
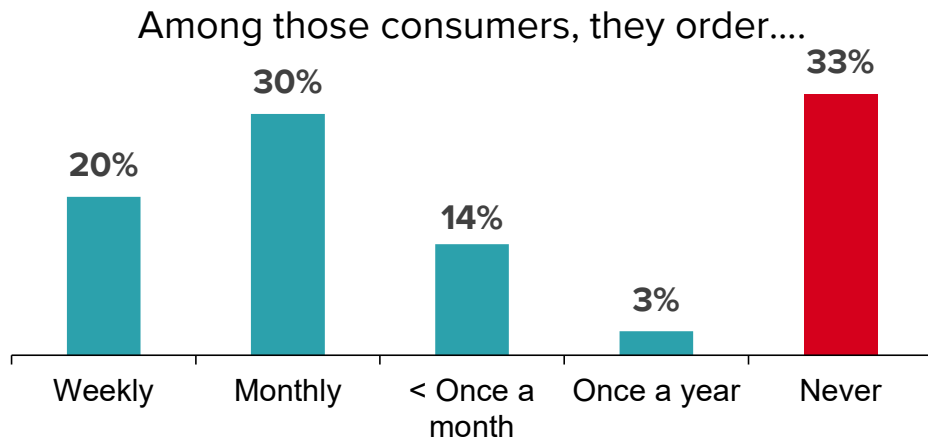


Source: State of Consumer Survey, Dynata Platform, August 2022; Q11, Thinking about the number of meals you are currently cooking at home, what percentage of your meals do you think you are cooking at home? Is [insert percentage] of meals cooked at home more, less or the same as 6 months ago? Do you expect to continue cooking more meals at home? (n=569). Analysis: National Cattlemen's Beef Association, on behalf of The Beef Checkoff.

# Online Grocery Ordering

Over half of consumers are ordering their groceries online (similar to 2021) and typically order directly from the store app or website

**64%** of consumers are actively ordering groceries online



*Source:* State of Consumer Survey, Dynata Platform, August 2022; Q27, How often, if ever, do you order groceries online for pick-up or delivery?  
*Analysis:* National Cattlemen's Beef Association, on behalf of The Beef Checkoff.

# Grocery Categories Purchased

Over 40% of consumers are purchasing beef when they order groceries online.



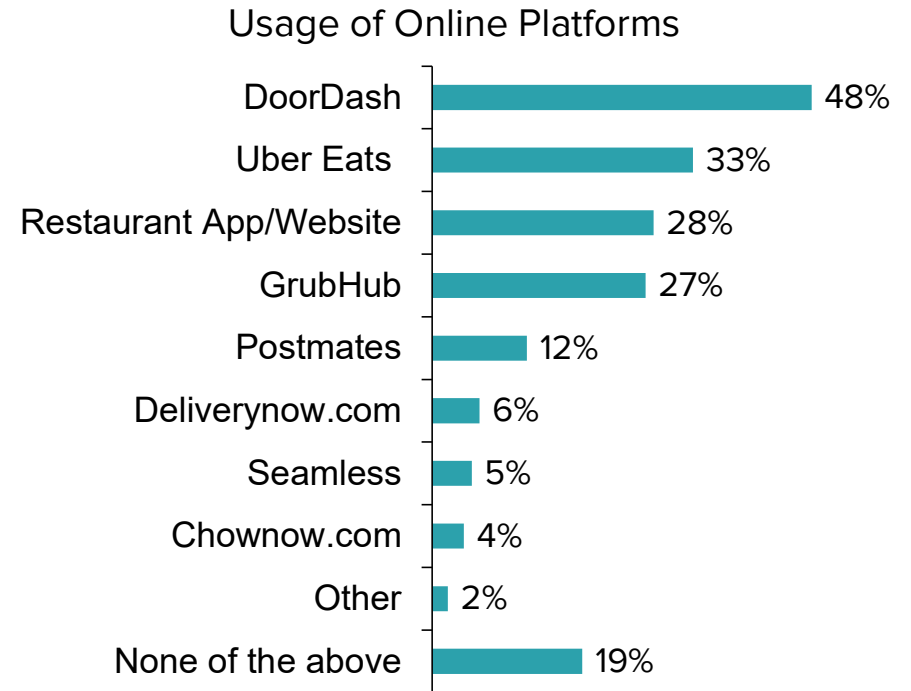
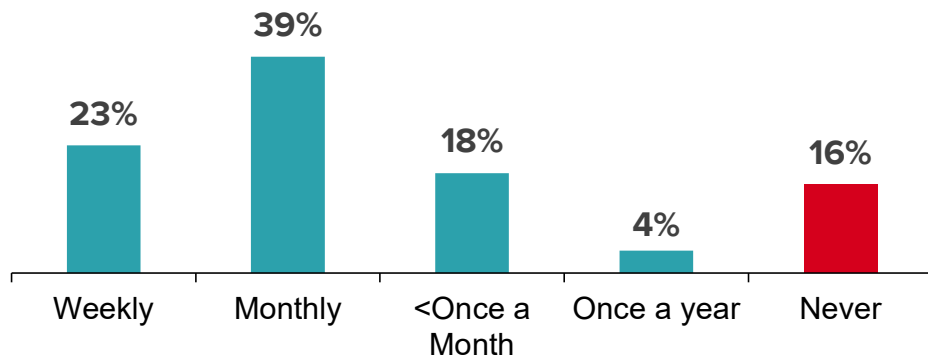
*Source:* State of Consumer Survey, Dynata Platform, August 2022; Q32. For each of the of the following categories of food, which best describes your ordering of groceries for pick-up/delivery?  
*Analysis:* National Cattlemen's Beef Association, on behalf of The Beef Checkoff.

# Online Meal Ordering

Most consumers are ordering meals online, with almost a quarter doing so on a weekly basis and use Door Dash most frequently

**80%** of consumers are actively ordering meals online

Among those consumers, they order....



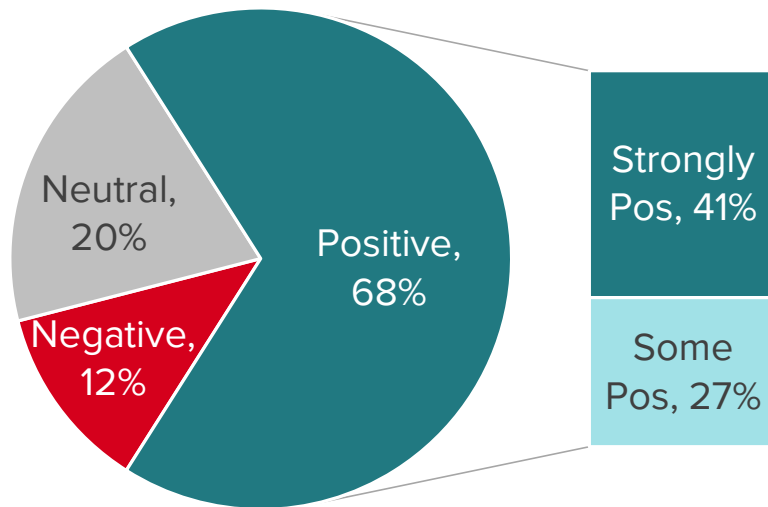
*Source: State of Consumer Survey, Dynata Platform, August 2022; Q19, How often, if ever, do you order meals from any form of restaurant online/through an app for delivery or pick-up? Which, if any, of the following online meal delivery platforms do you actively use to order meals from a restaurant for pick-up or delivery? Select all that apply. n = 1,203.*

*Analysis: National Cattlemen's Beef Association, on behalf of The Beef Checkoff.*

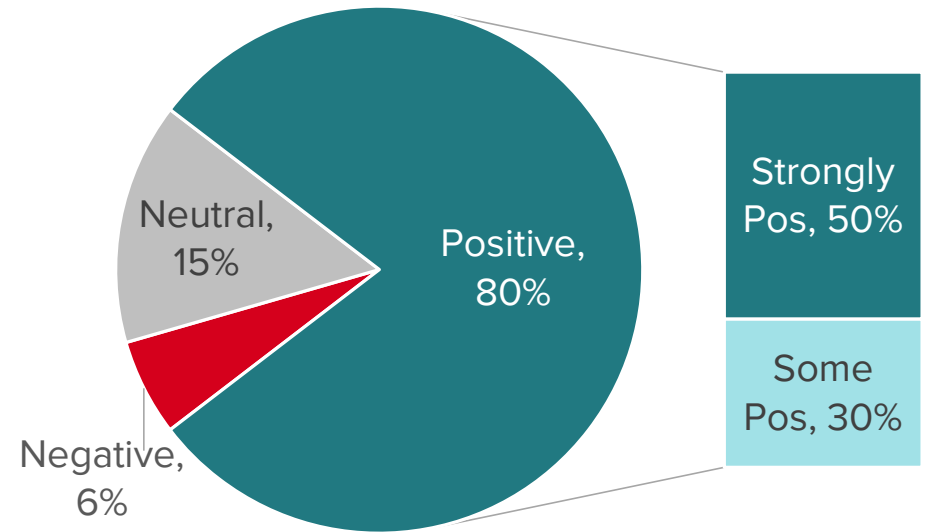
# Overall Perceptions - 2022

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

Overall Beef Perceptions



Overall Chicken Perceptions



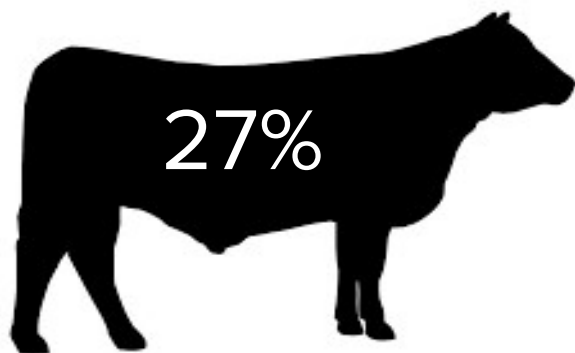
*Source: Consumer Beef Tracker, January – December 2022. Q6: What is your perception of beef?, What is your perception of chicken?  
Analysis: National Cattlemen's Beef Association, on behalf of The Beef Checkoff.*



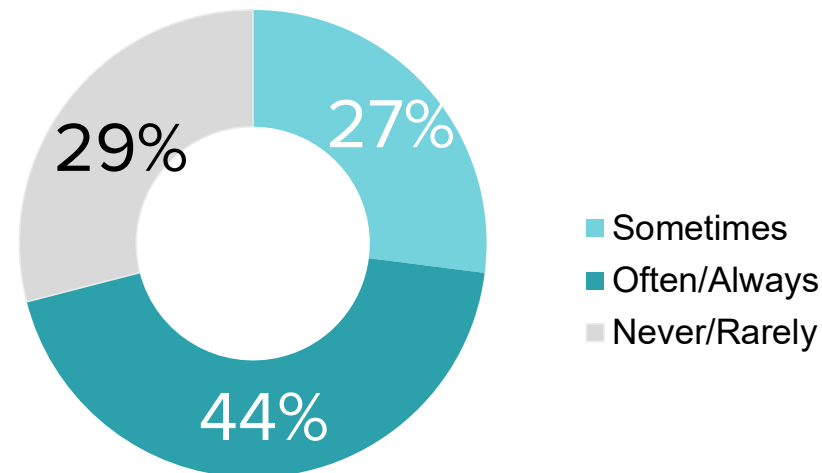
# Consumer Knowledge

Only 27% of consumers self-identify as being familiar with how cattle are raised, yet 71% consider how their food was raised/grown when making purchasing decisions.

Familiarity with How Cattle  
are Raised



Consider How Food Was  
Raised/Grown



*Source: Consumer Beef Tracker January – December 2022. 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.*

*Analysis: National Cattlemen's Beef Association, on behalf of The Beef Checkoff.*



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