Introduction
Consumer Insights

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3. Consumers and BQA
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Consumer Landscape
Average - At Least Weekly Consumption

Beef and chicken are consumed by most consumers on a weekly or more basis.

Average Consumed at Least Weekly

- Beef: 71%
- Chicken: 83%
- Pork: 47%
- Fish: 42%
- Meat Alternatives: 29%

Source: Consumer Beef Tracker Jan-Mar 2020
Regional Beef Consumption

66%

67%
Average Weekly+ Consumption

Source: Consumer Beef Tracker Jan 2019 - Dec 2019

Pacific (WA, OR, CA, AK, HI) West South Central (TX, OK, AR, LA) New England (ME, NH, VT, MA, RI, CT) Mountain (MT, ID, WY, NV, UT, CO, AZ, NM) East South Central (KY, TN, MS, AL) Middle Atlantic (NY, NJ, PA) West North Central (ND, SD, NE, KS, MN, IA, MO) East North Central (WI, IL, MI, IN, OH) South Atlantic (FL, GA, SC, NC, VA, WV, DC, MD, DE)
Overall perceptions have increased slightly for beef over time, but beef still lags behind chicken

Overall Beef Perceptions
- Negative: 13%
- Neutral: 18%
- Positive: 69%

Overall Chicken Perceptions
- Negative: 6%
- Neutral: 13%
- Positive: 81%

Source: Consumer Beef Tracker Oct-Dec 2019
Protein consideration is driven most by taste, followed by things like safety, value, and the eating experience.

<table>
<thead>
<tr>
<th>Is great tasting</th>
<th>You know how to prepare it</th>
<th>Fits my budget</th>
<th>Is a good value for the money</th>
<th>Is a very pleasurable eating experience</th>
<th>Is good for many types of meals</th>
<th>Is safe to eat</th>
<th>Is a healthy choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>87%</td>
<td>83%</td>
<td>80%</td>
<td>80%</td>
<td>79%</td>
<td>78%</td>
<td>78%</td>
<td>67%</td>
</tr>
<tr>
<td>88%</td>
<td>82%</td>
<td>81%</td>
<td>81%</td>
<td>80%</td>
<td>79%</td>
<td>81%</td>
<td>68%</td>
</tr>
</tbody>
</table>

Source: Consumer Beef Tracker Oct-Dec 2019
Across production related attributes, consumer consideration has increased from 2018 to 2019.

### Consideration Yearly Comparison

<table>
<thead>
<tr>
<th>Attribute</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is free from added hormones</td>
<td>49%</td>
<td>52%</td>
</tr>
<tr>
<td>No antibiotics used</td>
<td>48%</td>
<td>51%</td>
</tr>
<tr>
<td>Is raised responsibly</td>
<td>44%</td>
<td>47%</td>
</tr>
<tr>
<td>Environmentally friendly</td>
<td>42%</td>
<td>45%</td>
</tr>
<tr>
<td>Trust people that raise the animals</td>
<td>41%</td>
<td>44%</td>
</tr>
<tr>
<td>Is raised humanely</td>
<td>41%</td>
<td>46%</td>
</tr>
<tr>
<td>Supports causes important to me</td>
<td>31%</td>
<td>34%</td>
</tr>
<tr>
<td>Impact on community</td>
<td>28%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: Consumer Beef Tracker Jun 2018 - Dec 2019
Future Consumption of Beef

Consumers plan to eat more beef largely due to its taste, while consumers have a variety of reasons to eat less beef.

### Reasons to Eat More

<table>
<thead>
<tr>
<th>Reason</th>
<th>% Plan to Eat More</th>
</tr>
</thead>
<tbody>
<tr>
<td>You enjoy the taste of beef</td>
<td>5.9</td>
</tr>
<tr>
<td>Beef is my #1 protein choice</td>
<td>3.6</td>
</tr>
<tr>
<td>Grilling more often</td>
<td>3.1</td>
</tr>
<tr>
<td>Adding protein to your diet</td>
<td>3.0</td>
</tr>
<tr>
<td>Discovering new beef recipes</td>
<td>2.7</td>
</tr>
</tbody>
</table>

### Reasons to Eat Less

<table>
<thead>
<tr>
<th>Reason</th>
<th>% Plan to Eat Less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other meats are healthier</td>
<td>4.9</td>
</tr>
<tr>
<td>Concerned beef will negatively impact long-term health</td>
<td>4.5</td>
</tr>
<tr>
<td>Price is too expensive</td>
<td>4.2</td>
</tr>
<tr>
<td>Trying to eat more plant-based protein</td>
<td>3.9</td>
</tr>
<tr>
<td>Eating less beef is better for the environment</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Source: Consumer Beef Tracker Oct-Dec 2019
When it comes to production perceptions, beef outperforms chicken.
Unaidedly, animal welfare issues rise to the top of concerns with cattle production, specific topics are low.

Source: Consumer Beef Tracker Oct-Dec 2019; coded open end verbatims from consumers
Consumer Knowledge

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

Familiarity with How Cattle are Raised

- 27% familiar

Consider How Food Was Raised/Grown

- 30% sometimes
- 44% often/always
- 26% never/rarely

Source: Consumer Beef Tracker Oct-Dec 2019
3 Consumers and Beef Quality Assurance
## Responsible Beef Exploratory Research

### Objectives

- Understand consumer perceptions on food and beef production
- Understand consumer reactions to Beef Quality Assurance (BQA) program
- Understand the most relevant and effective ways to communicate BQA and “Responsibly Raised” message
- Understand consumer reactions to 2 potential storyboards to be produced into videos

### Methodology

- **9 Focus Groups in 3 regional cities**
- **Survey among 1,003 consumers**
- **2 Online Discussion Boards with 95 Consumers**

Source: 2018 Responsible Beef Exploration
Low Knowledge Level

A portion of consumers believe cattle live in confinement all of their lives, and most consumers have little knowledge of how cattle are raised.

Confined Conditions

I have no idea about the beef lifecycle.

Cattle are raised quickly and fed cheaply. They're pumped with hormones and antibiotics that transfer to the meat we eat when they're slaughtered.

I really have no clue whatsoever what goes into the lifecycle.

Source: 2019 Responsible Beef Exploration
Issues For Consumers

General consensus is there are large scale farms/ranches that operate like “corporations” and then, there are small family farms.

- Focused on money
  - Large scale
  - Inhumane treatment, crowding, overuse of ABX
  - Current state of food production

- Smaller, family-owned farms
  - Higher quality, better conditions
  - Dying breed
  - Niche Markets

“You see documentaries and it’s like a prison – they are all caged together.”

Source: 2018 Responsible Beef Exploration
Impact of BQA

Learning about BQA made consumers more confident in safety and animal welfare, while also showing potential to represent the industry.

- **70%** Confidence in Beef Safety
- **67%** Animals Treated Humanely
- **62%** BQA represents beef at their grocery store

Source: 2018 Responsible Beef Exploration
Perceptions of how cattle are raised improved markedly after exposure to the BQA program.

Perception Of How Cattle Are Raised For Food

This is a good program. It educates farmers and keeps consumers safe upon purchasing beef.

It sounds like a good program to ensure cattle are raised and treated correctly.

C1a. What is your perception of how cattle are raised for food? Please select one response.
B11. Now after everything you have read about the Beef Quality Assurance Program, what is your perception of how cattle are raised for food?
BQA Response

There are varying levels of details that consumers desire

Source: 2018 Responsible Beef Exploration
Video Testing Using Interest Tracking

Please drag the icon below on the scale to gauge your interest throughout the ad. Drag the scale to the right to show more interest and to the left to show less interest.

Used to better understand and assess consumer reactions and feedback to two video ads surrounding the BQA campaign.

Source: Responsible Beef Video Test 2019
Interest Tracking

Animal Welfare scenes increased interest the most for consumers

32%

Animal Welfare
9% Only Way
8% Room to Roam
6% BQA
5% Slogan

"Seeing the cattle roaming around and being able to see the living arrangements because it makes me trust that they are doing what they say they are for the animals"

"My interest increased when it showed the ways the company takes care of the animals that the beef comes from."

"My interest increased most when mentioning gentle handling and raising because I want my food animals to be treated with care throughout their lives. I feel it's a moral responsibility."

"More and more ranchers are choosing the right way to raise cattle, because it is the only way...that way the animals have a better life..."

Thinking about the ad you just saw, what part did your interest increase the most

Source: Responsible Beef Video Test 2019
Interest Tracking

The video had a consistent increase in interest with a jump at the BIWFD slogan and Rodeo music

Source: Responsible Beef Video Test 2019
BEEF QUALITY ASSURANCE: RAISING THE BAR ON RAISING CATTLE

The beef community has a long-standing commitment to caring for their animals and providing families with the safest, highest-quality beef possible. Beef Quality Assurance (BQA) is a program that trains farmers and ranchers on best practice cattle management techniques to ensure their animals and the environment are cared for within a standard set of guidelines and regulations across the U.S. beef industry.

Learn more about the BQA program.
BQA Campaign Overview

BQA was introduced to consumers and other non-producer audiences in mid-October as part of continuing efforts to help consumers better understand how beef is responsibly raised and show how farmers and ranchers are committed to producing safe, high-quality beef.
BQA Campaign Overview

The Goal: Help consumers continue to feel good about how beef is raised by highlighting the commitment of farmers and ranchers, through BQA, to raising beef safely, humanely, and sustainably.
Campaign Key Performance Indicators

- 11 million BQA/BIWFD video views
- 58.6 million media impressions of BQA/BIWFD ads
- 10.5 million audio listens of BQA/BIWFD radio ads
- 4 million social media engagements
- 15,000 MBA grads received information about campaign
- 150 business-decision makers registered for supply chain webinar
- 146 media outlets received press release with an audience of 178 million
- 16 radio interviews from radio media tour, airing more than 700 times and reaching more than 22 million consumers
### Beef Tracker Data - Agreement

<table>
<thead>
<tr>
<th>Positive About Beef</th>
<th>Positives of Production</th>
<th>Low Familiarity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jul '19: 62%</td>
<td>Jul '19: 34%</td>
<td>Jul '19: 47%</td>
</tr>
<tr>
<td>Aug '19: 67%</td>
<td>Aug '19: 37%</td>
<td>Aug '19: 44%</td>
</tr>
<tr>
<td>Sep '19: 63%</td>
<td>Sep '19: 37%</td>
<td>Sep '19: 47%</td>
</tr>
<tr>
<td>Oct '19: 70%</td>
<td>Oct '19: 39%</td>
<td>Oct '19: 42%</td>
</tr>
<tr>
<td>Nov '19: 72%</td>
<td>Nov '19: 43%</td>
<td>Nov '19: 41%</td>
</tr>
<tr>
<td>Dec '19: 67%</td>
<td>Dec '19: 38%</td>
<td>Dec '19: 44%</td>
</tr>
</tbody>
</table>

Source: Consumer Beef Tracker
BQA Campaign Impact

During and after the campaign launched, production perceptions increased significantly

- Is produced in an environmentally friendly way
  - Jul '19: 50%
  - Aug '19: 52%
  - Sep '19: 50%
  - Oct '19: 58%
  - Nov '19: 59%
  - Dec '19: 52%

- Is raised responsibly
  - Jul '19: 52%
  - Aug '19: 53%
  - Sep '19: 55%
  - Oct '19: 56%
  - Nov '19: 59%
  - Dec '19: 51%

- You trust the people that raise the animals
  - Jul '19: 48%
  - Aug '19: 51%
  - Sep '19: 50%
  - Oct '19: 57%
  - Nov '19: 57%
  - Dec '19: 52%

- You know how the food source was raised or grown
  - Jul '19: 48%
  - Aug '19: 50%
  - Sep '19: 50%
  - Oct '19: 54%
  - Nov '19: 56%
  - Dec '19: 50%

Source: Consumer Beef Tracker
Current Dynamics
Directions COVID Dashboard - Concern

Source: Directions Research 2020 COVID Dashboard
COVID Update – Retail Sales

$ Sales Growth Vs. Comparable Week in 2019 ending

Fresh beef
Fresh chicken
Fresh pork
Fresh turkey
Fresh lamb
TOTAL MEAT

Source: IRI, Total US, MULO, 1 week % change vs. YA
COVID Update – Restaurant Transactions

U.S. Restaurant Weekly Transactions PCYA

Source: The NPD Group/CREST® Performance Alerts
About 2/3 of consumers show concern for future food shortages, noting staples as the items they are most concerned about.
While many are working from home, most of these other circumstances do not apply to a significant portion of consumers.

- Working from home: 41%
- None of the above: 27%
- Working less hours: 18%
- Working more hours: 12%
- Recently laid off: 11%
- Recently furloughed: 11%
- Working staggered daily shifts for social distancing purposes: 10%
- Rotating days in the office for social distancing purposes: 9%

Source: COVID Snapshot survey April – May 2020
COVID-19: Detailed Spending Changes

Large item purchases are being put on hold, flexible spending has declined, and essential spending has increased the most.

<table>
<thead>
<tr>
<th>Category</th>
<th>Put on hold</th>
<th>Less</th>
<th>Same</th>
<th>More</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large item purchases (furniture/car/equipment)</td>
<td>46%</td>
<td>23%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>Money towards Savings (Emergency, Vacation, Retirement, College)</td>
<td>27%</td>
<td>20%</td>
<td>38%</td>
<td>15%</td>
</tr>
<tr>
<td>Flexible Spending (small item spending outside of essential such as entertainment, alcohol, toys, games)</td>
<td>24%</td>
<td>39%</td>
<td>26%</td>
<td>11%</td>
</tr>
<tr>
<td>Essential spending (groceries/sanitation supplies/home goods)</td>
<td>10%</td>
<td>18%</td>
<td>35%</td>
<td>37%</td>
</tr>
</tbody>
</table>

How has your typical spending and purchasing habits changed in the last month?

Source: COVID Snapshot survey April – May 2020
COVID-19: Why Spending Has Changed

Not surprising, consumers are being more cautious with their money as a result of COVID-19 and are worried about the economy.

- Being cautious due to COVID-19/Coronavirus: 61%
- Worried about the long-term impact to the economy: 48%
- Better to be safe than sorry: 44%
- Worried about the short-term impact of the economy: 36%
- Looking for activities to do while COVID-19/Coronavirus is happening: 28%
- Need to focus my money on stocking up: 24%
- Worried about a member of household losing their job: 18%
- A member of my household lost their job: 14%
- There are great deals right now: 12%

Generally speaking, which statements best represent why your purchase behavior has changed?

Source: COVID Snapshot survey April – May 2020
The majority of consumers are more concerned about food safety as a result of COVID-19, with half of those being significantly more concerned.

As a result of COVID-19, consumers are:

- **73%** More concerned
- **24%** Unchanged
- **3%** Less concerned

36% are significantly more concerned about food safety, compared to 37% who are somewhat more concerned.

Source: Food Safety Handling Practices, 2020

How has the current global environment around COVID-19/Coronavirus changed your concern for food safety?
Most consumers have at least a week of food on hand, but few with more than 3-4 weeks worth

Which of the following best describes your shopping behavior during the current COVID-19/Coronavirus environment. If you were to estimate the amount of time you could eat adequate substantial meals from your current stock of food in your pantry, fridge, freezer, deep freeze, extra storage, how long would it last for you and your family?

- **Estimated Time Currently Have Stocked up**
  - Less than a week: 7%
  - 1-2 weeks: 34%
  - 3-4 weeks: 35%
  - 5-6 weeks: 12%
  - 6-8 weeks: 5%
  - 2+ months: 6%

SOURCE: Beef Behavior and COVID Report, April 2020
About 20% say they have over five steak meals saved up. Over 30% say the same for ground beef meals.

<table>
<thead>
<tr>
<th></th>
<th>Roasts</th>
<th>Steak</th>
<th>Ground Beef</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do Not Have</td>
<td>49%</td>
<td>36%</td>
<td>17%</td>
</tr>
<tr>
<td>1-2 Meals Worth</td>
<td>20%</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>3-4 Meals Worth</td>
<td>16%</td>
<td>15%</td>
<td>29%</td>
</tr>
<tr>
<td>5-6 Meals Worth</td>
<td>7%</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>7-9 Meals Worth</td>
<td>4%</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>10+ Meals Worth</td>
<td>3%</td>
<td>3%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Incentives To BUY Beef

Similarly, in order to buy beef in the future people are also looking for convenient meal ideas and retail promotions.

Quick and easy meal ideas: 34%
Meal preparation ideas: 28%
Retail promotions: 27%
Grilling recipes: 23%
Beef meals using common pantry items: 23%
Ideas on how to use ground beef: 23%
Indulgent recipes: 19%
Meal kits with beef: 17%
None of these: 17%
Cooking technique's: 16%
Chef-inspired recipes: 16%
How to use beef leftovers: 16%
More information on different cuts of steak: 13%
Knowing the product was supporting causes from those: 12%
Online cooking demo’s: 9%

Outside of price, what would encourage you to continue to buy beef as COVID-19/Coronavirus continues? Please select all that apply. SOURCE: Beef Behavior and COVID Report, April 2020
Verbatims Mentions of Concerns/Fears

The number of consumers with concerns, particularly with meat shortages has declined, while pricing concerns remain consistent.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>No concerns/fears</td>
<td>43%</td>
<td>38%</td>
<td>41%</td>
<td>38%</td>
<td>31%  ↓</td>
<td>38%  ↑</td>
</tr>
<tr>
<td>Are afraid of things being out of stock</td>
<td>15%</td>
<td>15%</td>
<td>16%</td>
<td>20%</td>
<td>27%  ↑</td>
<td>15%  ↓</td>
</tr>
<tr>
<td>Economy/Prices going up</td>
<td>11%</td>
<td>10%</td>
<td>7%</td>
<td>7%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Food handling/Contamination going out</td>
<td>7%</td>
<td>9%</td>
<td>8%</td>
<td>6%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Food supply/animals getting</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Packing plant closure/exposure</td>
<td>2%</td>
<td>7%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Having seen things out of stock</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Farmers/Ranchers running low or struggling</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

SOURCE: Beef Behavior and COVID Report, April 2020

Thinking about the next few months and how you may purchase and consume beef, please tell us about any fears, worries, or concerns you have. (n=250 per week)
Online Meal Orders

The number of consumers ordering meals online is high with almost half doing so on a weekly basis.

86% Of consumers are currently ordering meals online.

Among those consumers, they order:

- Weekly: 46%
- Monthly: 39%
- Every 2-3 months: 11%
- Once a year: 3%

(n = 684)

SOURCE: Online Ordering Meal Delivery – April 2020
Two thirds of consumers have increased or just started online meal ordering and plan to continue or increase this behavior.

How consumer online ordering has changed:

- Increased: 53%
- Just started: 16%
- Unchanged: 26%
- Decreased: 11%

Future Expectations:

- I will use online pick-up/delivery more: 23%
- I will continue using online pick-up/delivery the same amount: 50%
- I will decline in the future but continue doing it: 18%
- I will stop using online pick-up/delivery entirely: 9%

Source: Online Meal Ordering Study, May 2020
Online Grocery Shoppers

Online grocery shoppers tend to be younger, have a mid to high income, and half have kids.

67% Of consumers are currently buying groceries online.

Among these consumers, they shop:

- **Weekly**: 24%
- **Monthly**: 51%
- **Every 2-3 months**: 17%
- **Once a year**: 7%

- **Are younger than 45**: 69%
- **Are middle to higher income**: 65%
- **Have kids in the house**: 52%

(n = 534)

SOURCE: Online Ordering Meal Delivery – April 2020
In light of current events, online grocery shopping has increased and for others it’s an entirely new behavior they plan to continue.

How consumer online shopping has changed:
- 51% Increased
- 21% Just started
- 22% Unchanged
- 6% Decreased

Future Expectations:
- 26% I will use online pick-up/delivery more
- 43% I will continue using online pick-up/delivery the same amount
- 18% I will decline in the future but continue doing it
- 12% I will stop using online pick-up/delivery entirely

SOURCE: Online Ordering Meal Delivery – April 2020
How has the frequency of when you order groceries online for pick-up or delivery changed in the past few weeks? Which of the following best describes what you believe will be your future online grocery pick-up/delivery purchase frequency?
THANK YOU
Shawn Darcy
Senior Director, Market Research
National Cattlemen’s Beef Association
sdarcy@beef.org
Appendix
2019 Market Share – Year End

Animal Proteins vs. Substitutes

- All Animal Proteins: 99.64%
- AP Substitutes: 0.36%

Beef vs. Beef Substitutes

- Beef: 99.32%
- Beef Substitutes: 0.68%

Sources: IRI, Refrigerated/Frozen Meat Substitutes, 52 weeks ending 12/1/20; IRI/Freshlook, Total US MULO ending 12/1/20; Usage and Volumetric Assessment of Beef in Foodservice, Technomic, December 2019
Vegan/Vegetarian Consumers Over Time

Due to different panels and surveys definitions, the diets listed and the sample have slight variations.
Change in Meat Substitutes

Retail
- Increase is minimal
- Distribution is nearing saturation
- Increase now driven mostly by same store sales
- Continued growth in Beyond sales
- Introduction of Impossible at retail

Foodservice
- Increase is minimal
- Increase driven mostly by additional menu items
- Menu items added mostly at Quick Service (e.g., Burger King)

Sources: IRI, Refrigerated/Frozen Meat Substitutes, 52 weeks ending 12/1/20; IRI/Freshlook, Total US MULO ending 12/1/20; Usage and Volumetric Assessment of Beef in Foodservice, Technomic, December 2019
Regional Meat Alt. Consumption

Source: Consumer Beef Tracker Jan 2019 - Dec 2019

Pacific (WA, OR, CA, AK, HI) West South Central (TX, OK, AR, LA ) New England (ME, NH, VT, MA, RI, CT) Mountain (MT, ID, WY, NV, UT, CO, AZ, NM) East South Central (KY, TN, MS, AL) Middle Atlantic (NY, NJ, PA) West North Central (ND, SD, NE, KS, MN, IA, MO) East North Central (WI, IL, MI, IN, OH) South Atlantic (FL, GA, SC, NC, VA, WV, DC, MD, DE)
The number of consumers planning to eat more meat alternatives has leveled off after slowly increasing the past two years.
Health is largely the reason consumers plan to eat meat alternatives in the future, as compared to the environment or animal treatment.

Reasons for Future Consumption

- **Health**: 42%
- **Environment**: 16%
- **Animal Treatment**: 16%
- **Taste**: 7%

Source: Consumer Beef Tracker Oct-Dec 2019 (n=89)
Frequent meat alternative consumers are eating a variety of other meat proteins including a consistent level of beef as the average consumer.

% of Consumers Eating Weekly or More

- **Meat Alternatives**: 29%
- **Beef**: 71%
- **Chicken**: 83%
- **Pork**: 47%
- **Fish**: 42%

Among Weekly+ Meat Alt Eaters:

- **72%**
- **82%**
- **56%**
- **68%**

Over index for Pork/Fish

Source: Consumer Beef Tracker Jan-Mar 2020 Data