

Insights from the Meat Demand Monitor Project

Glynn Tonsor

May 28, 2024

Virginia Cattlemen's Association Webinar



<https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data>



KANSAS STATE

Department of
Agricultural Economics

Vol. 5, Issue 4 • Apr. 2024

MDM: Meat Demand Monitor

The MDM tracks U.S. consumer preferences, views, and demand for meat with separate analysis for retail and food service channels. MDM is a monthly online survey with a sample of over 2,000 respondents reflecting the national population.



Demand is **NOT** Per Capita Consumption

2013 Beef Demand Determinants Study



[http://www.beefboard.org/evaluation/
130612demanddeterminantstudy.asp](http://www.beefboard.org/evaluation/130612demanddeterminantstudy.asp)



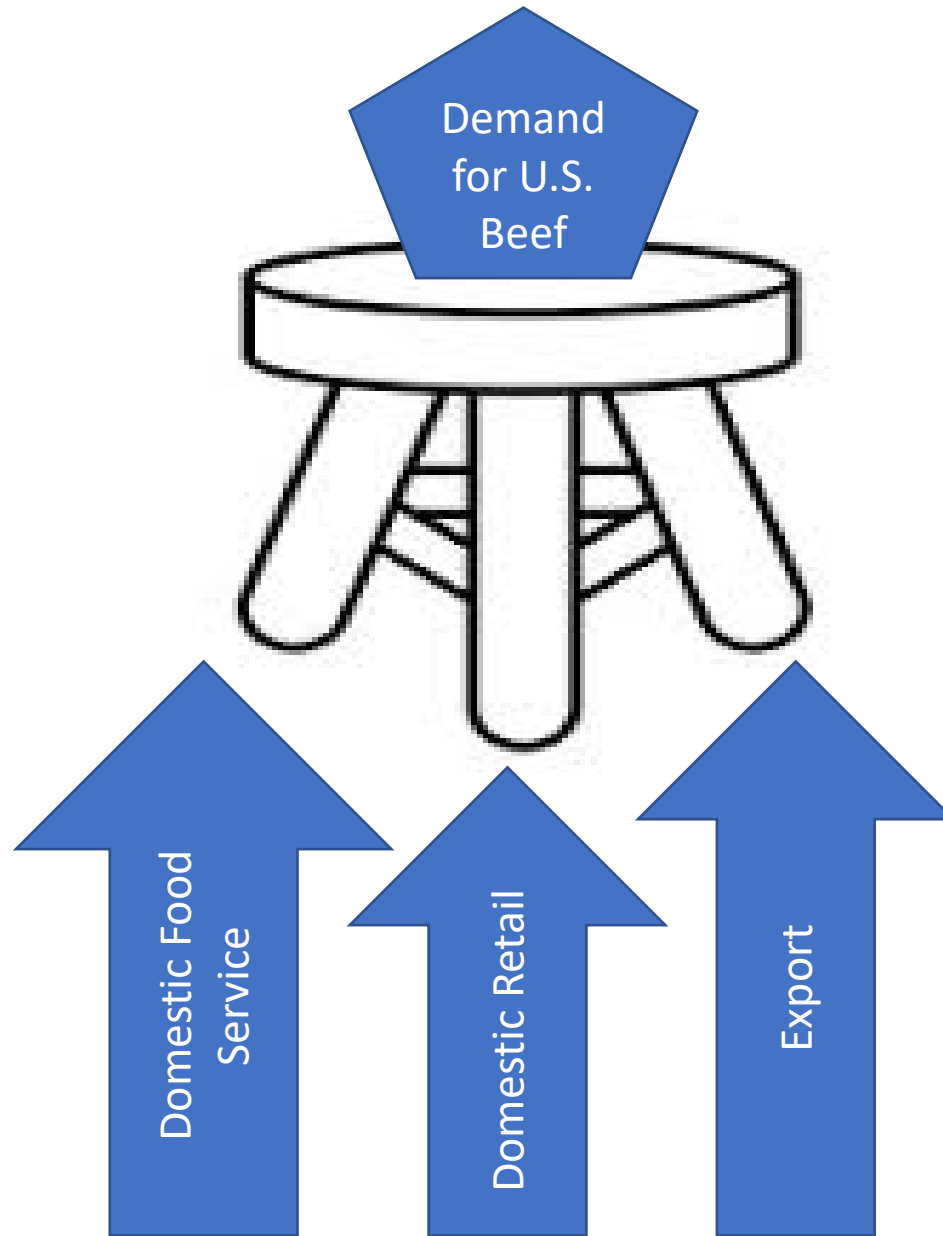
MARKETING > OUTLOOK

What's The Similarity Between Blue Jeans and Beef Demand?

Beef consumption and beef demand isn't the same thing. Here's an explanation.

Burt Rutherford | Sep 19, 2013

<http://www.beefmagazine.com/beef-demand/what-s-similarity-between-blue-jeans-and-beef-demand>



See Nov 22' Extended Discussion w/ Matt Perrier on Practically Ranching:
<https://www.buzzsprout.com/1995747/11686340>

Broad MDM Overview

1-STOP LOCATION FOR U.S. MEAT DEMAND TRENDS & INFORMATION

- Monthly surveys & experiments > 2,000 U.S. residents
 - ❖ >1,000 food service, restaurant focused
 - ❖ >1,000 retail, grocery-store focused
- Systematic economic modeling of consumer meat demand, preference, and behavior

FUNDING PARTNERSHIP & TIMING

- Fully launched Feb. 2020
 - Jointly funded by Beef & Pork Checkoffs
- Current Beef Checkoff support scheduled to end September 2025

All MDM outputs, procedures, & data fully available on KSU's AgManager.info website

Monthly Meat Demand Monitor, Methods, and Supporting Information

Home / Livestock & Meat / Meat Demand / Monthly Meat Demand Monitor [Survey Data]

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[Meat Demand](#)

[Meat Demand Research Studies](#)

[Monthly Domestic Meat Demand Indices \[USDA/BLS Data\]](#)

[Monthly Export Meat Demand Indices \[USDA/BLS Data\]](#)

[Monthly Meat Demand Monitor \[Survey Data\]](#)

[Monthly Meat Demand Monitor \(Prior Years\)](#)

[Production Economics](#)

[Marketing Charts](#)

[CLPER Newsletter](#)

Monthly Meat Demand Monitor [Survey Data]

Add to Favorites

The Meat Demand Monitor (MDM) project is funded in-part by the beef checkoff and the pork checkoff. Monthly reports and supporting documentation are available here.



Monthly Meat Demand Monitor

Title	Author	Date	Downloads
Meat Demand Monitor - January 2022	Tonsor	January 28, 2022	Downloads
Multi-Month Summary Report: July-December 2021	Tonsor Lusk	January 13, 2022	Downloads
Meat Demand Monitor - December 2021	Tonsor	January 6, 2022	Downloads
Meat Demand Monitor - November 2021	Tonsor	December 3, 2021	Downloads

Methods and Supporting Information

Title	Author	Date	Downloads
2022 Raw Data - MDM For 2021 data, click HERE For 2020 data, click HERE	Tonsor	February 2, 2022	Downloads
Monthly Survey - January 2022	Tonsor	January 31, 2022	Downloads

- ✓ SHORT MONTHLY REPORTS & APPROVED TWEETS (#MDM)
- ✓ RAW DATA
- ✓ SURVEY INSTRUMENTS & UNDERLYING PROCEDURE DOCS
- ✓ ACADEMIC PAPERS USING MDM
- ✓ LINKS TO EXAMPLE MEDIA USE

Broad Activity Flow

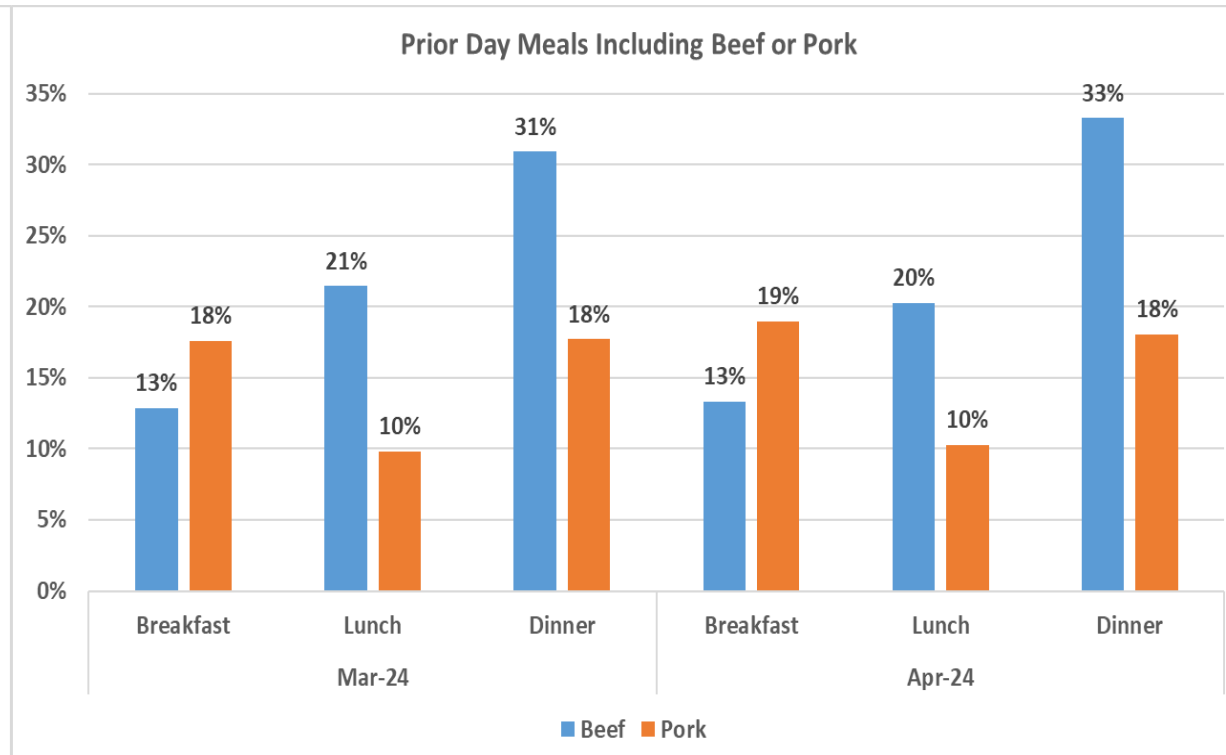
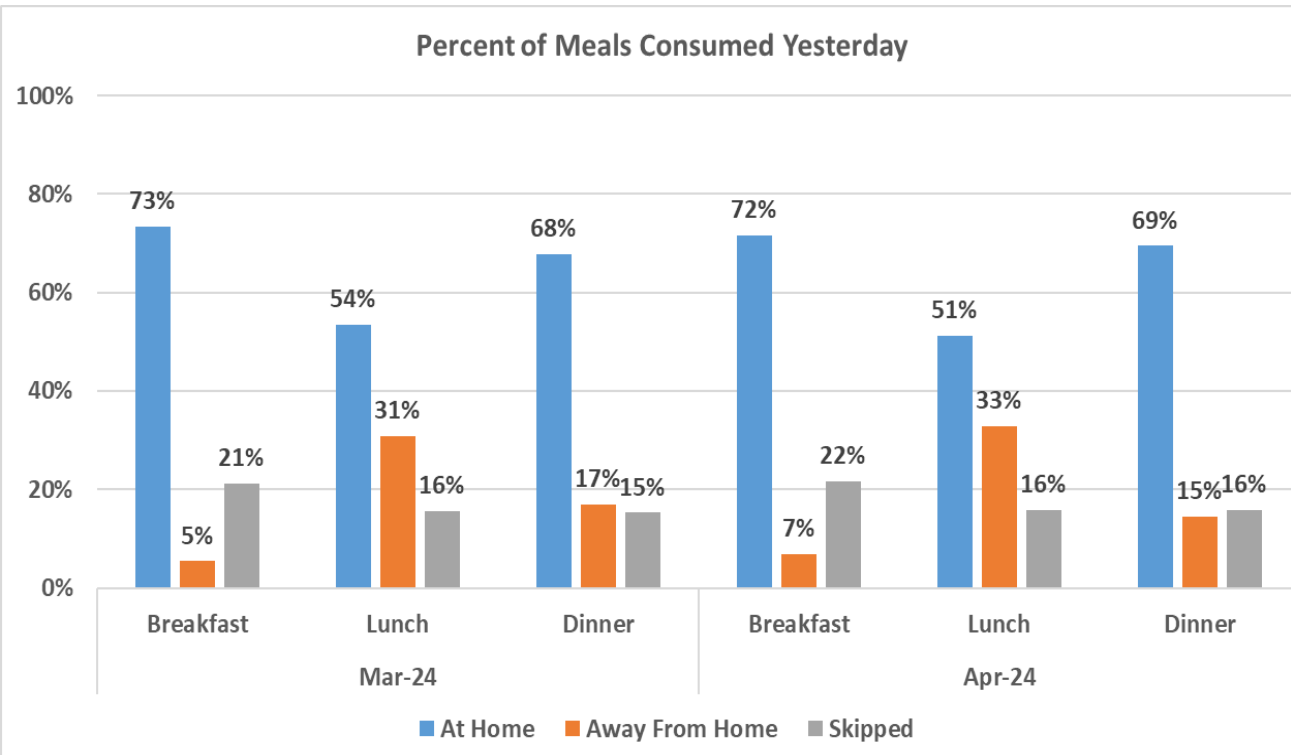
- Ongoing data collection (~1st 25 days of each month)
 - KSU's Qualtrics & Dynata/Samplify
- Monthly base analysis
 - USDA approval on 4-page report & Tweets
 - AoA summary & NHF summary
- Periodic USFR coverage & 1-off Assessments

Broad Overview of Survey Sections

- Prior Day Recall
- Protein Values
- Choice Experiment
- Consumer Knowledge
- Ad Hoc Section
- Socio-Economic Questions

Broad Overview of Survey Sections

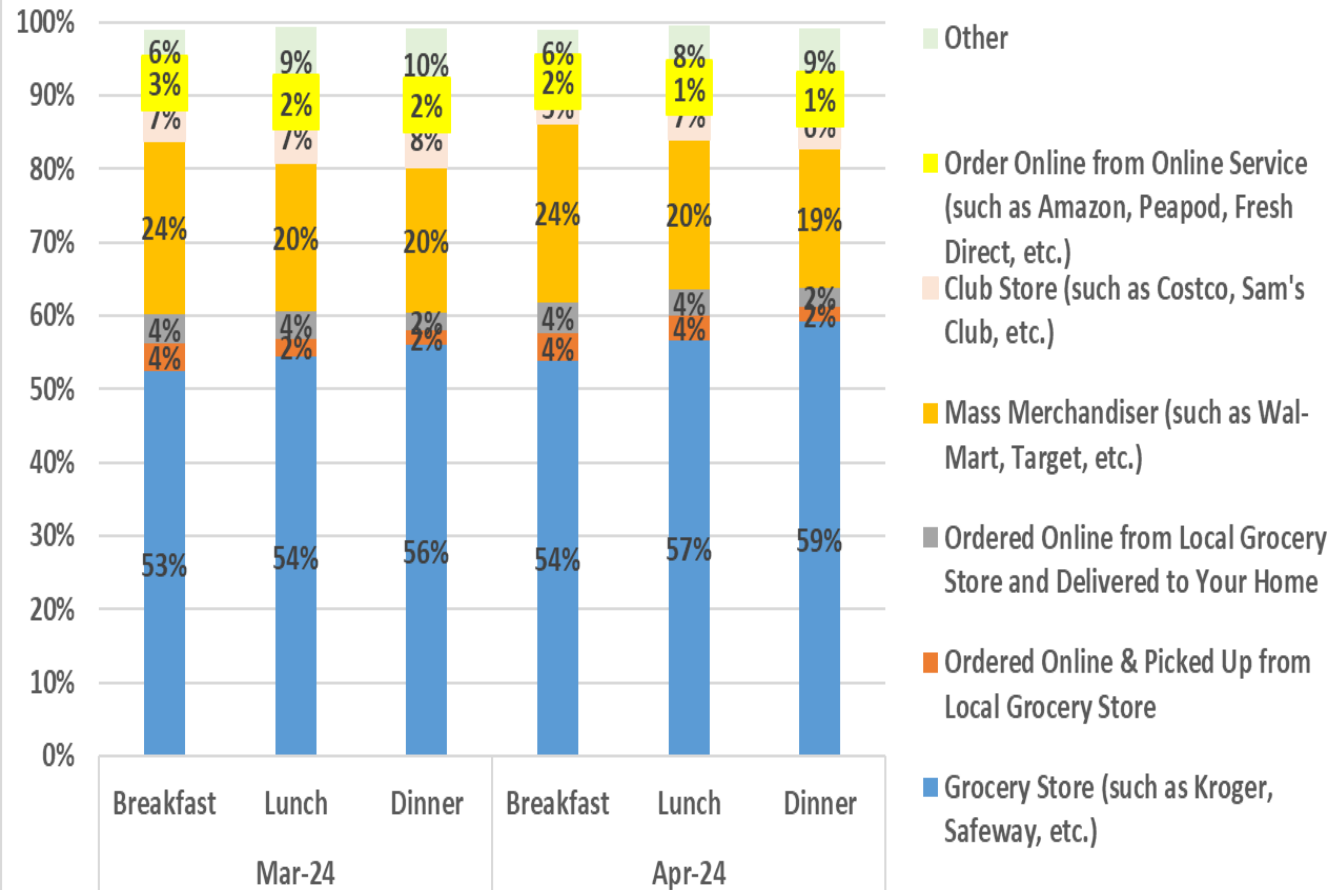
- Prior Day Recall
 - Breakfast/Lunch/Dinner
 - Location & Protein Source
 - Protein-Species (breakfast: bacon, at-home, bought from Grocery)



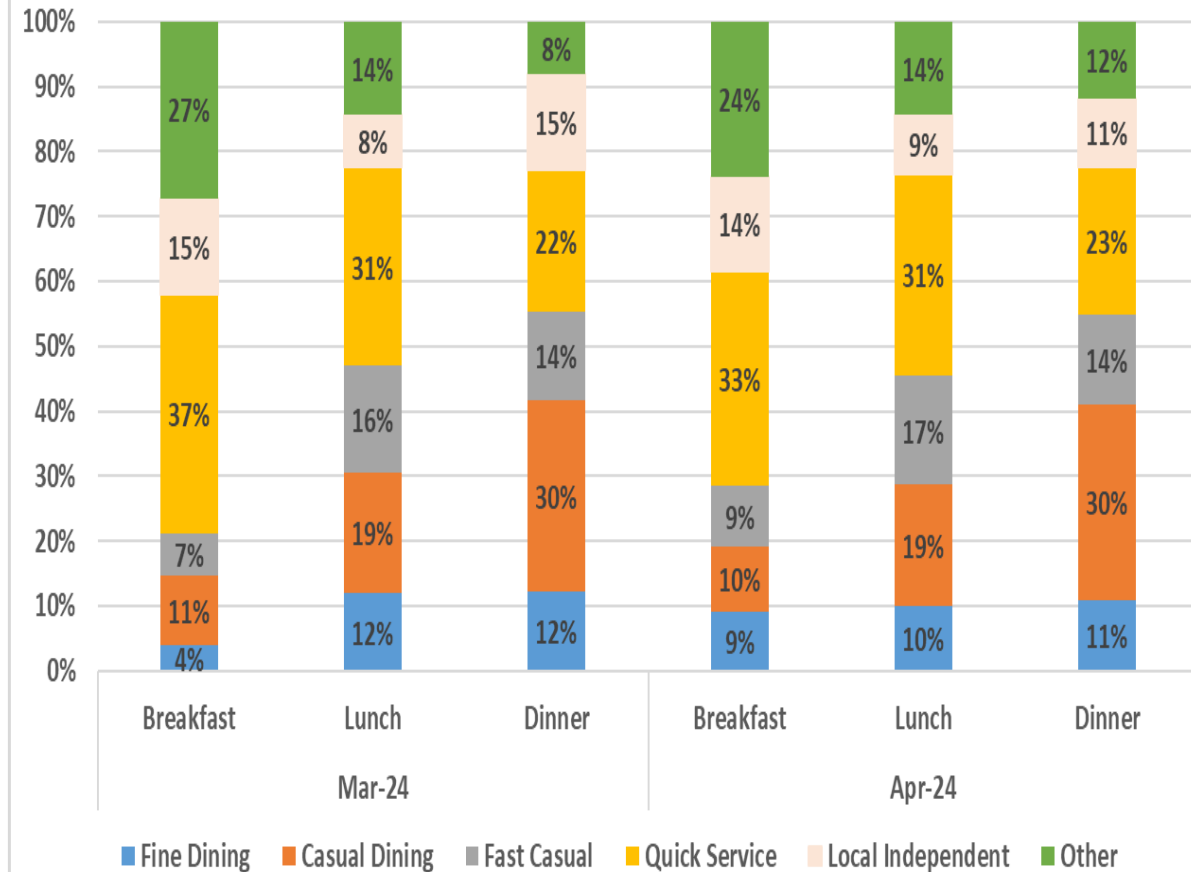
Broad Overview of Survey Sections

■ Prior Day Recall

Percent of At-Home Meals by Protein Source

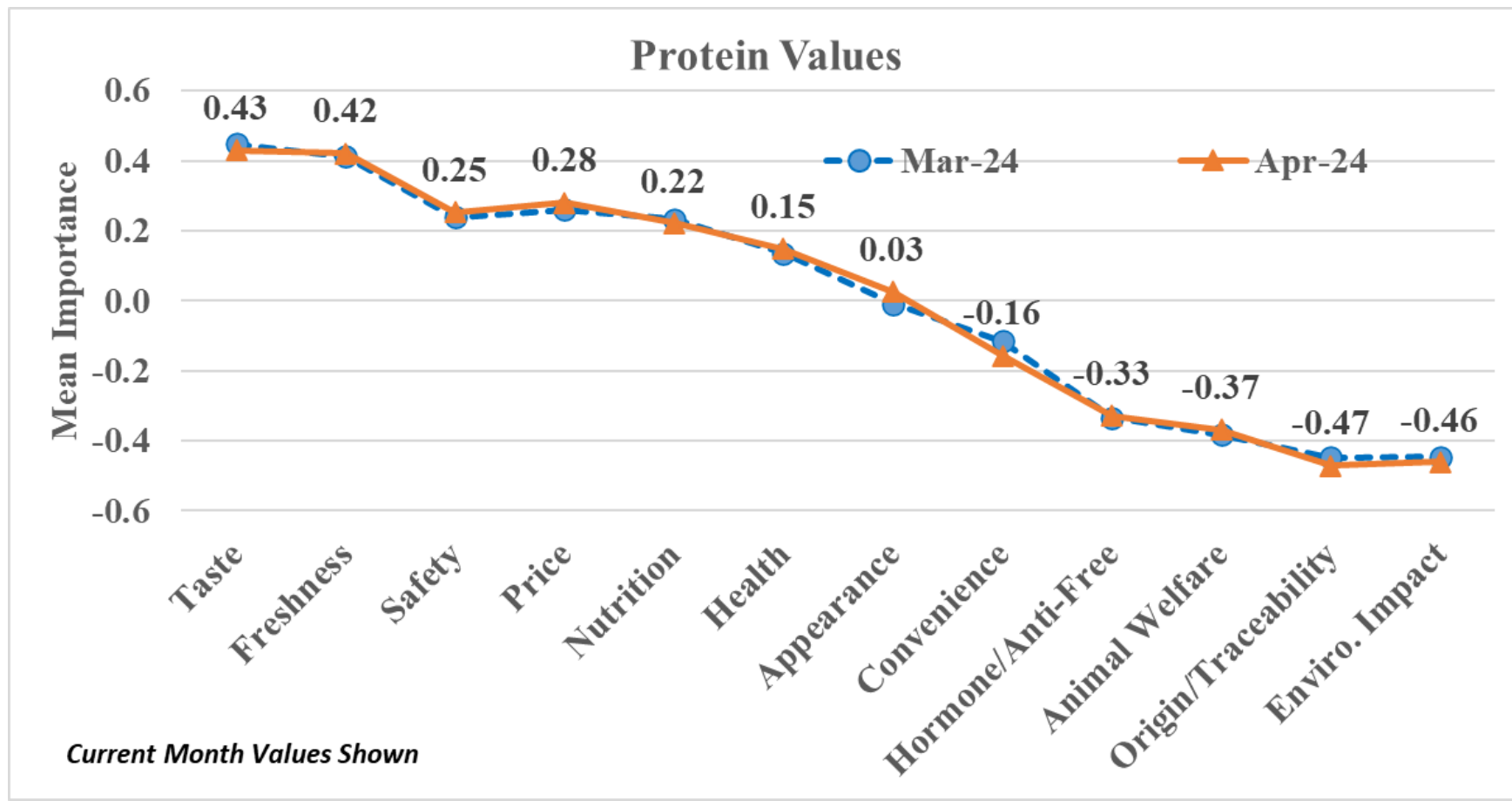


Percent of Away-from-Home Meals by Restaurant Type

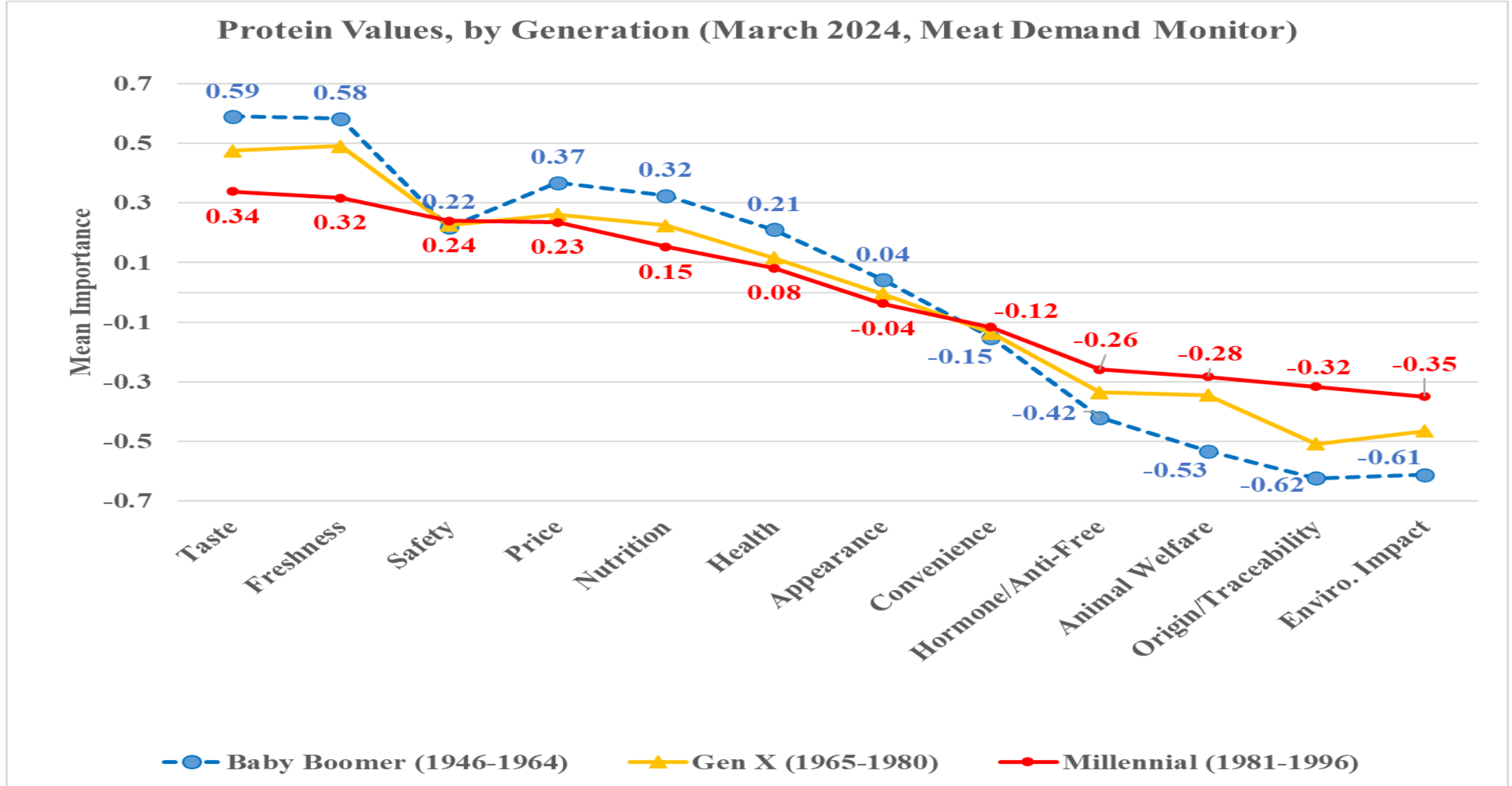


Broad Overview of Survey Sections

- Protein Values
 - Most/Least important factors in protein purchasing decision



Protein Values – What Drives Purchasing?



Broad Overview of Survey Sections

- Choice Experiment: Design
 - ½ Retail & ½ Dinner-Meal, Food Service
 - 9 questions each (27 in complete design for each market channel)

Which of the following would you purchase?



Ribeye Steak \$16.99/lb Ground Beef \$4.49/lb Pork Chop \$7.49/lb Bacon \$7.99/lb Chicken Breast \$14.49/lb Plant-Based Patty \$11.99/lb Shrimp \$8.49/lb Beans and Rice \$2.99/lb

I would choose:

Which of the following would you purchase?



Ribeye Steak \$18.99/meal Beef Hamburger \$11.99/meal Pork Chop \$14.49/meal Baby Back Ribs \$17.99/meal Chicken Breast \$12.99/meal Plant-based Patty \$14.99/meal Shrimp \$13.49/meal Salmon \$16.99/meal

I would choose:

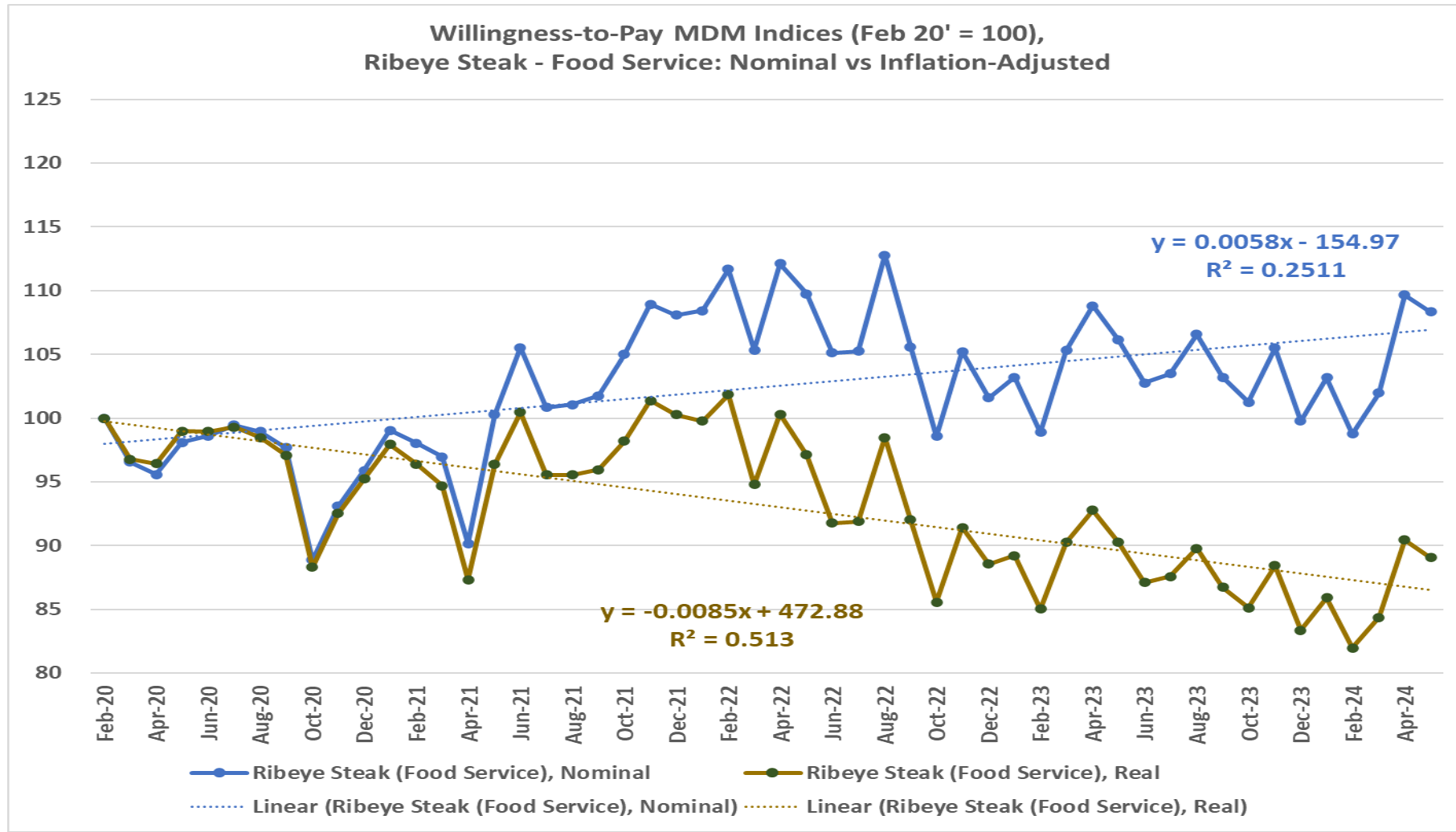
Broad Overview of Survey Sections

Choice Experiment: Mean WTP Estimates

RETAIL		Ribeye Steak	Ground Beef	Pork Chop	Bacon	Chicken Breast	Plant-Based Patty	Shrimp	Beans and Rice	Something Else
Mar-24	WTP (\$/lb)	\$ 17.27	\$ 8.67	\$ 6.98	\$ 5.80	\$ 8.52	\$ 8.76	\$ 9.81	\$ 3.54	
	Market Share	7%	25%	12%	7%	27%	2%	5%	8%	7%
Apr-24	WTP (\$/lb)	\$ 17.48	\$ 8.77	\$ 7.05	\$ 5.74	\$ 8.57	\$ 7.50	\$ 9.21	\$ 2.97	
	Market Share	8%	25%	13%	7%	28%	2%	4%	7%	7%
FOOD SERVICE		Ribeye Steak	Beef Hamburger	Pork Chop	Baby Back Ribs	Chicken Breast	Plant-Based Patty	Shrimp	Salmon	Something Else
Mar-24	WTP (\$/lb)	\$ 26.29	\$ 19.59	\$15.57	\$ 18.16	\$ 17.86	\$ 13.39	\$ 17.74	\$19.57	
	Market Share	14%	25%	4%	10%	15%	4%	13%	9%	6%
Apr-24	WTP (\$/lb)	\$ 28.28	\$ 21.38	\$16.81	\$ 19.83	\$ 19.89	\$ 13.99	\$ 19.50	\$21.06	
	Market Share	15%	25%	4%	10%	16%	4%	13%	9%	4%

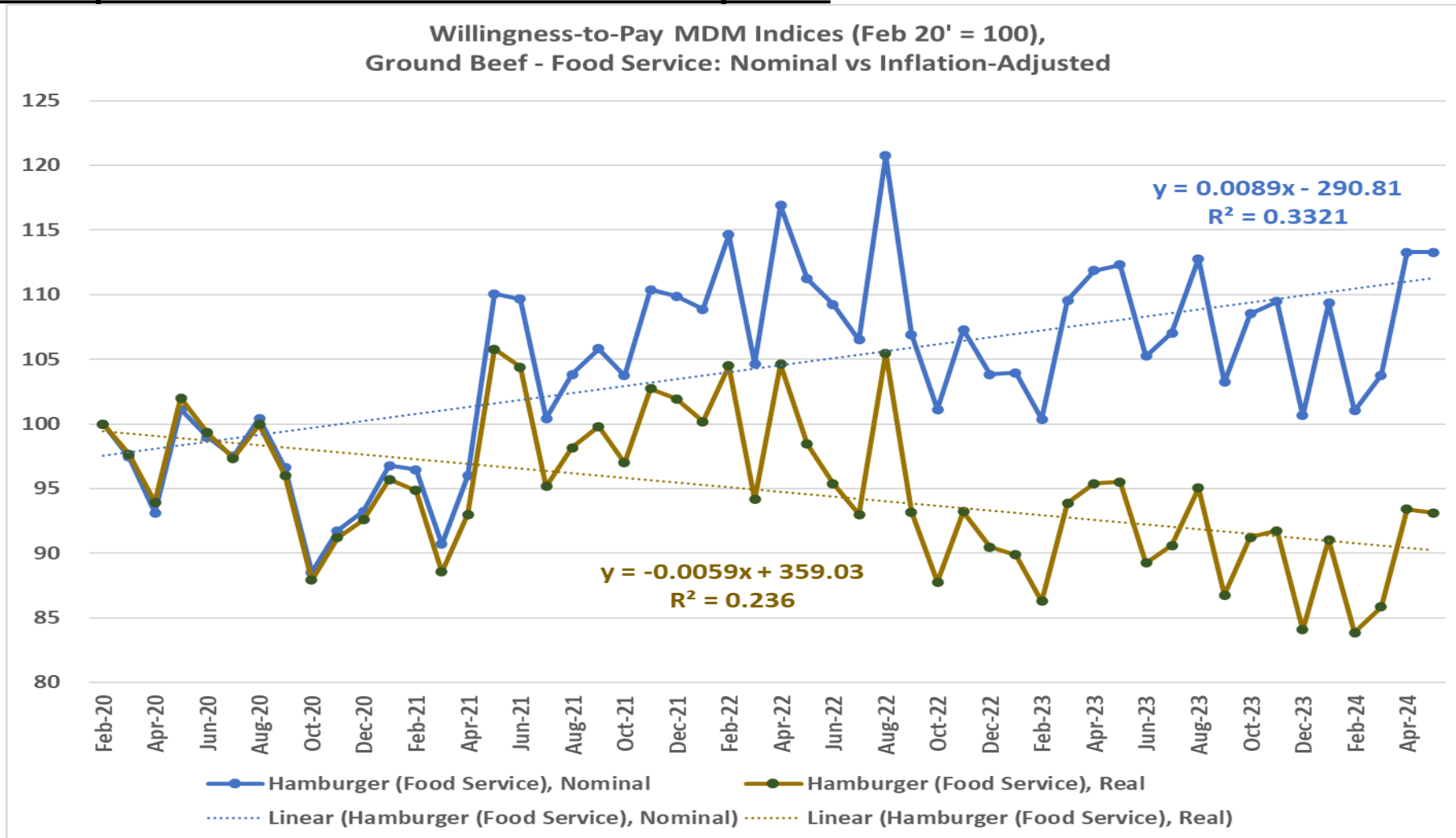
Broad Overview of Survey Sections

Choice Experiment: Trend Examples



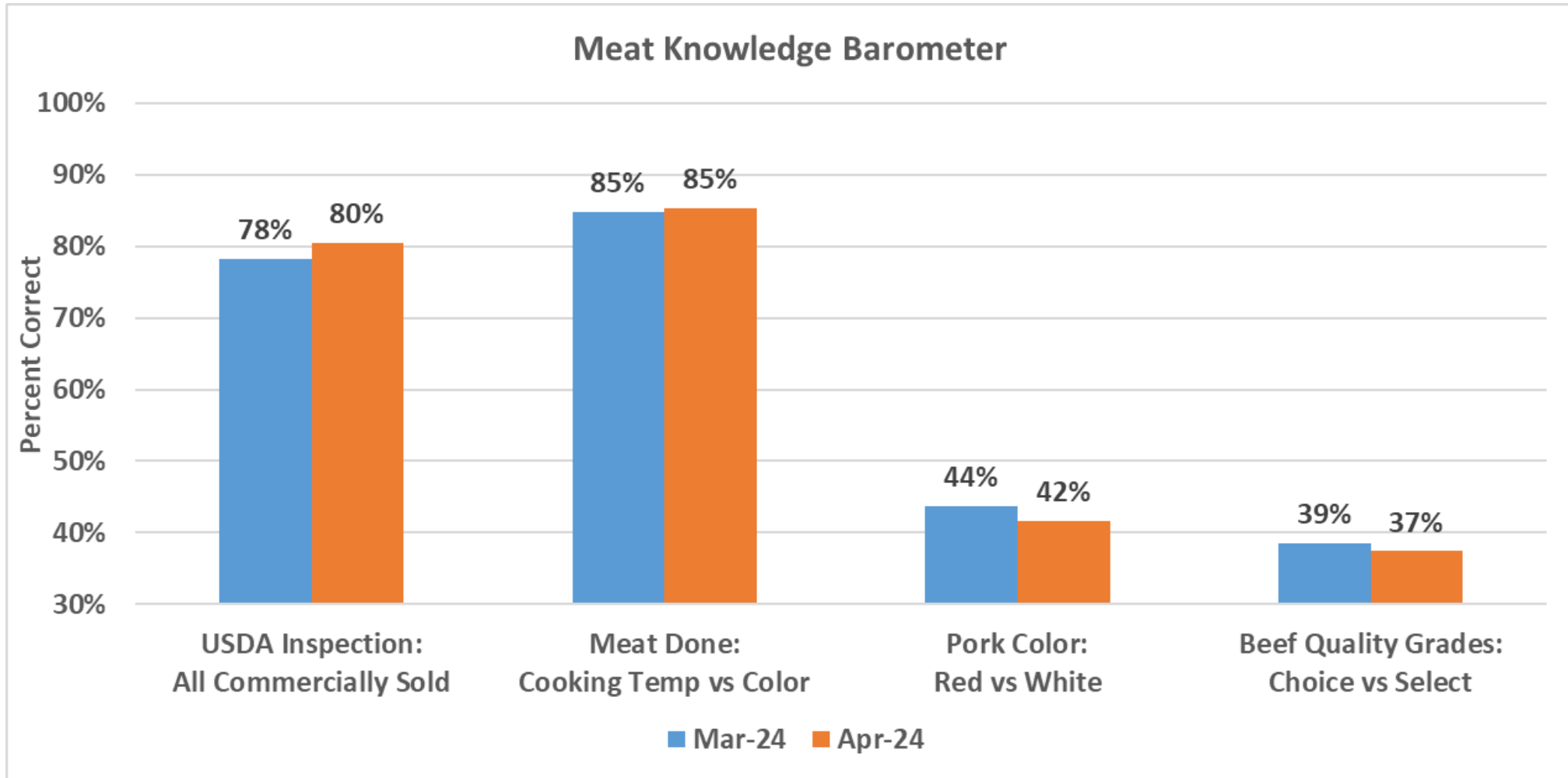
Broad Overview of Survey Sections

Choice Experiment: Trend Examples



Broad Overview of Survey Sections

■ Consumer Knowledge

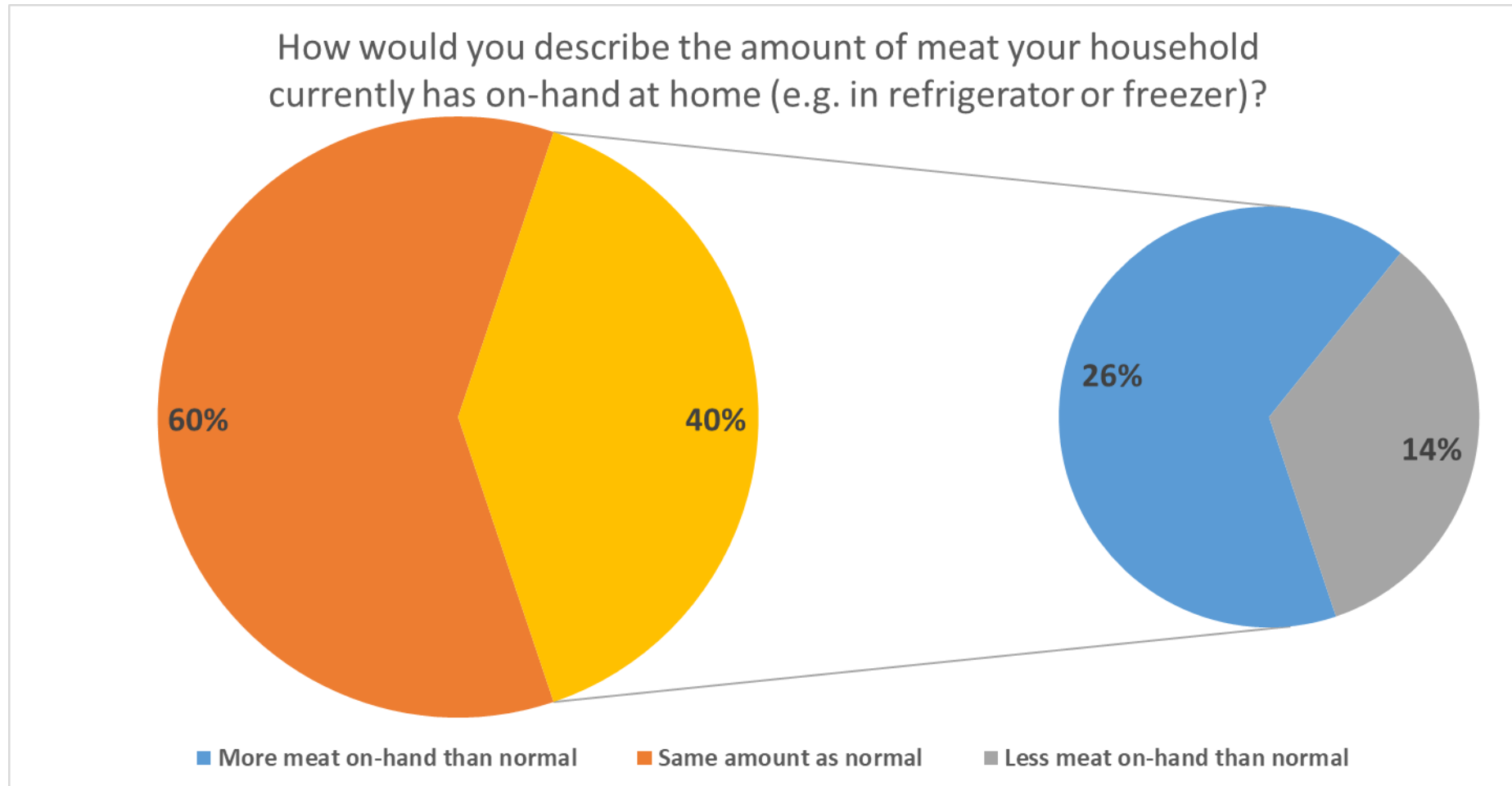


Broad Overview of Survey Sections

- “Ad Hoc” Section
 - Several COVID-19, pandemic-oriented questions
 - Open-ended (how many) retail question
 - Retail price expectations
 - Beef & Pork purchase details (package size, claims on labels, etc)

Broad Overview of Survey Sections

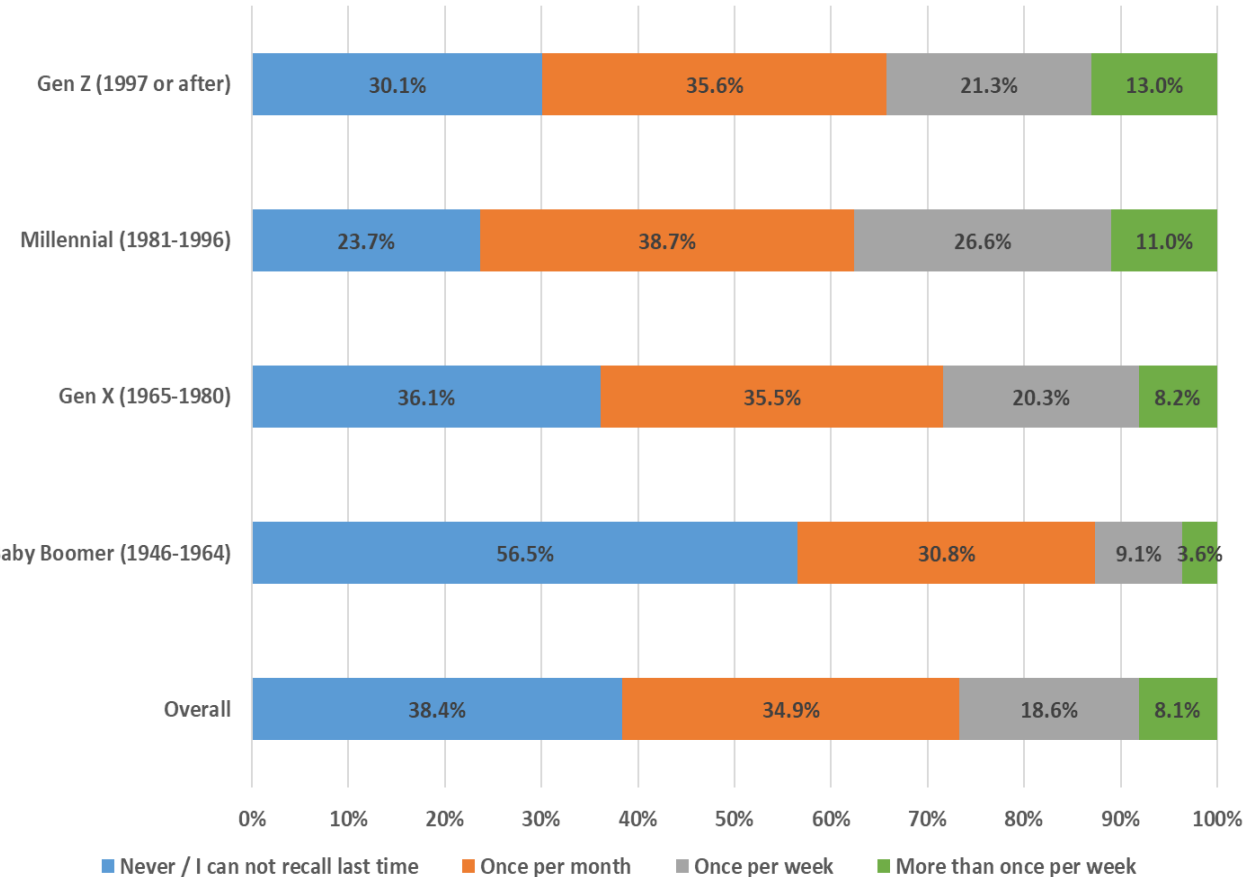
■ Ad Hoc Section: May 2020 Example



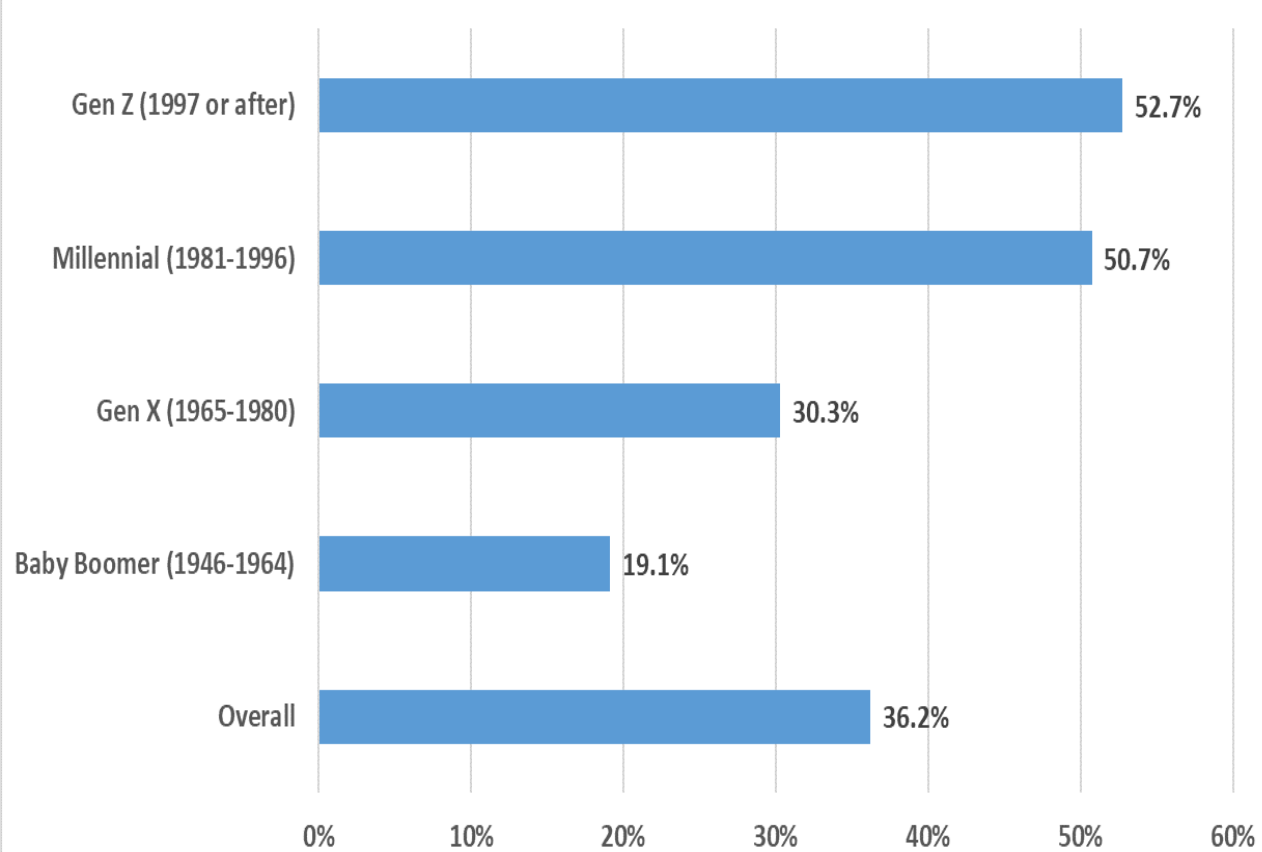
Broad Overview of Survey Sections

Ad Hoc Section: Generational Insights, Q1-2023

Frequency of Ground Pork Consumption, by Generation
(Mar. 2023, MDM)

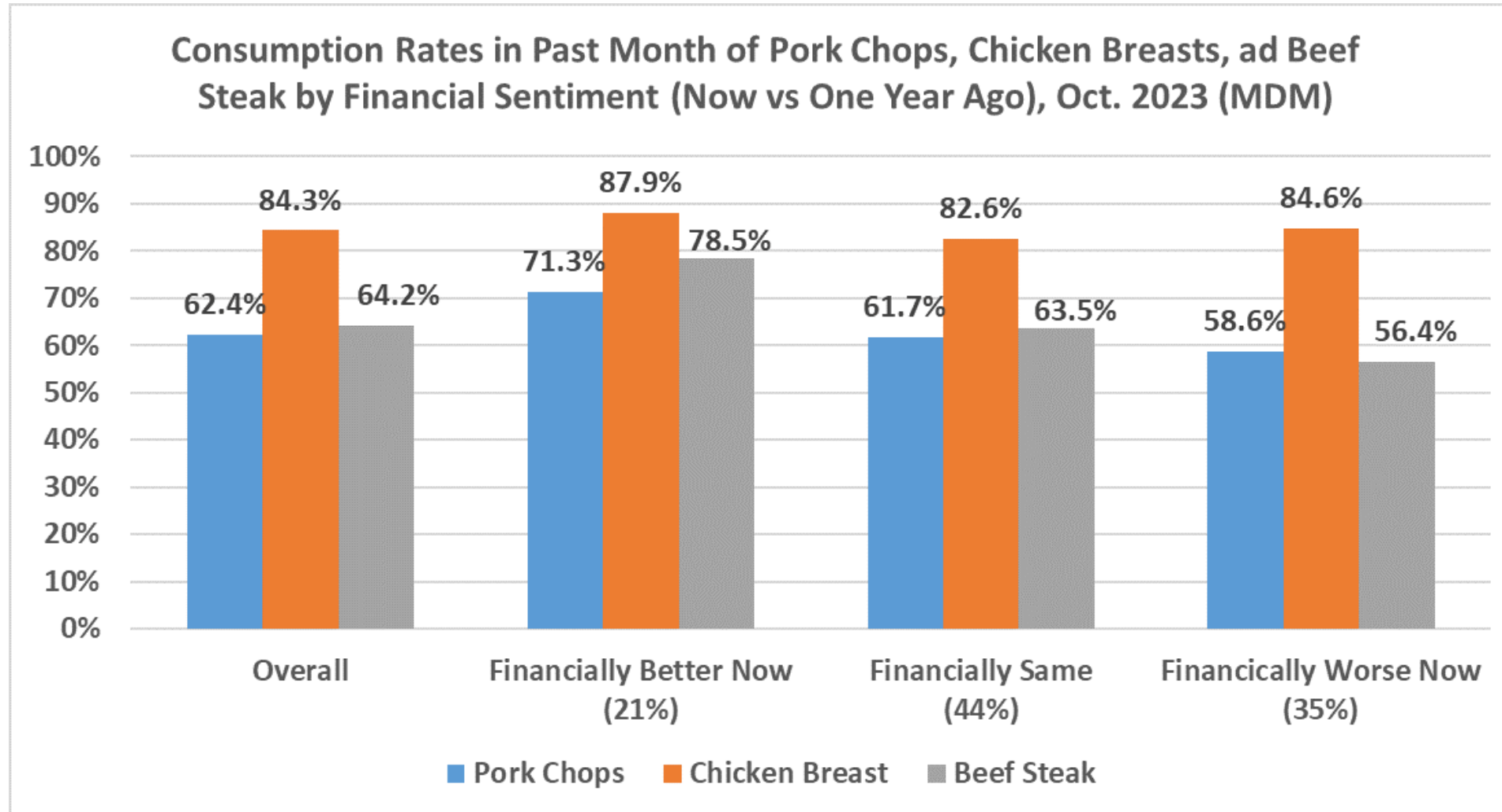


Share Intentionally Eating Protein for Strength-Training or Other Fitness-Related Goals, by Generation (Feb. 2023, MDM)



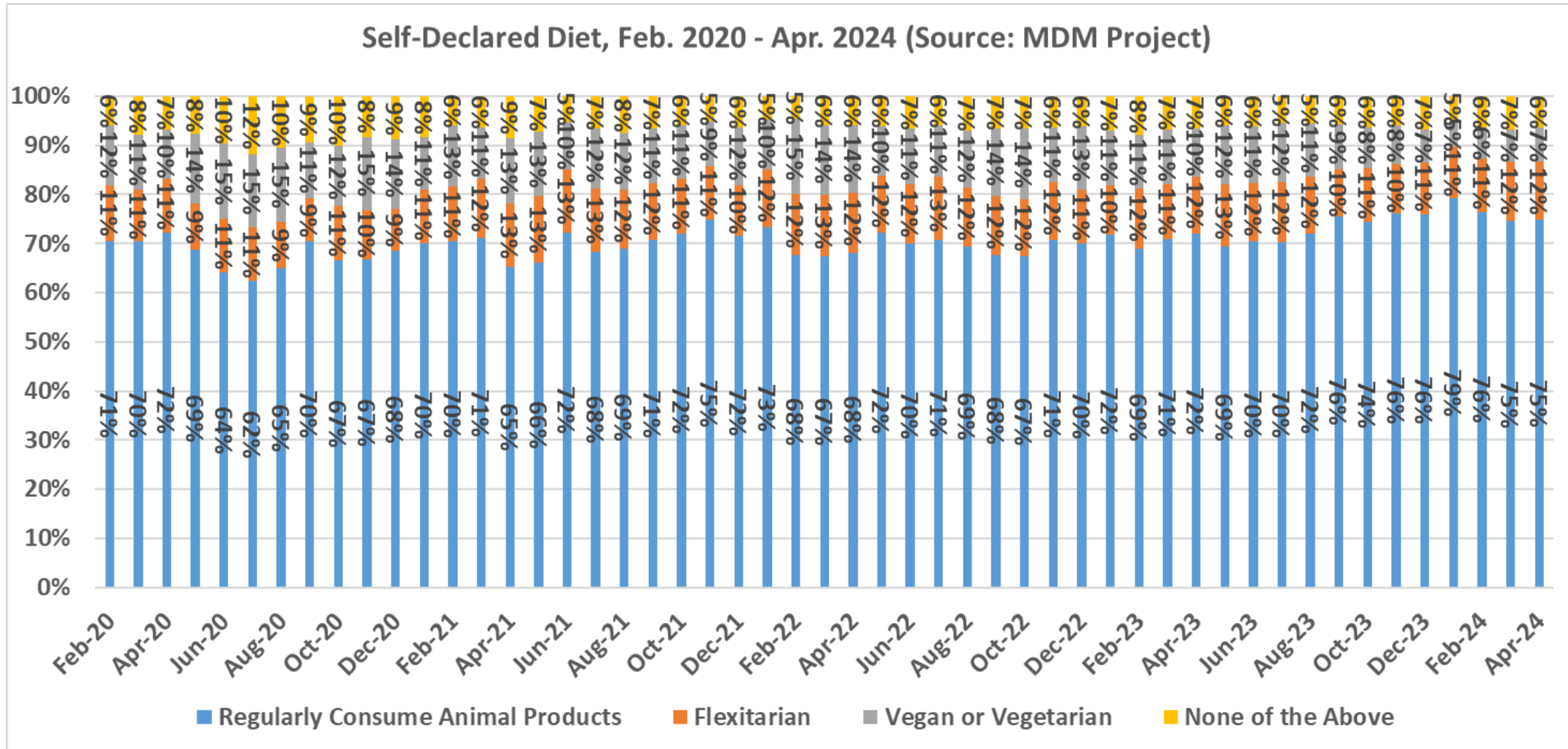
Broad Overview of Survey Sections

Ad Hoc Section: Oct 2023 Example



Broad Overview of Survey Sections

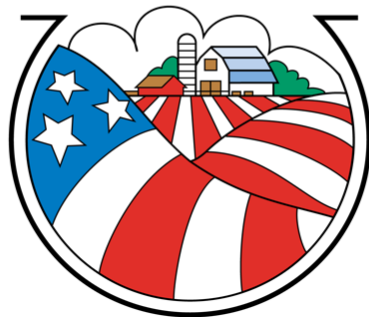
■ Socio-Economic Questions



Media Partnering



**U.S. FARM
REPORT**



- ✓ **AOA (MIKE PEARSON/JESSE ALLEN HOST)**
 - ✓ GT monthly interview w/ latest MDM info
 - ✓ 1 million live listeners each interview;
 - ✓ + 200k via Sirius Rural Radio
 - ✓ 5,500 AoA podcast downloads each month

- ✓ **USFR (TYNE MORGAN HOST)**
 - ✓ 500,000 listeners/video viewers each interview
 - ✓ 5-10,000 on each AgDay website post

- ✓ **#MDM TWEETS (@TONSORGLYNN)**
 - ✓ Jan-Sep 23': > 30,000 impressions

- ✓ **AGMANAGER.INFO**
 - ✓ >20,000 page views to-date of MDM page

State-Level Dashboard (Justin Bina)

<https://ksumeatdemandmonitor.shinyapps.io/MDMapp/>

✓ UNITED STATES

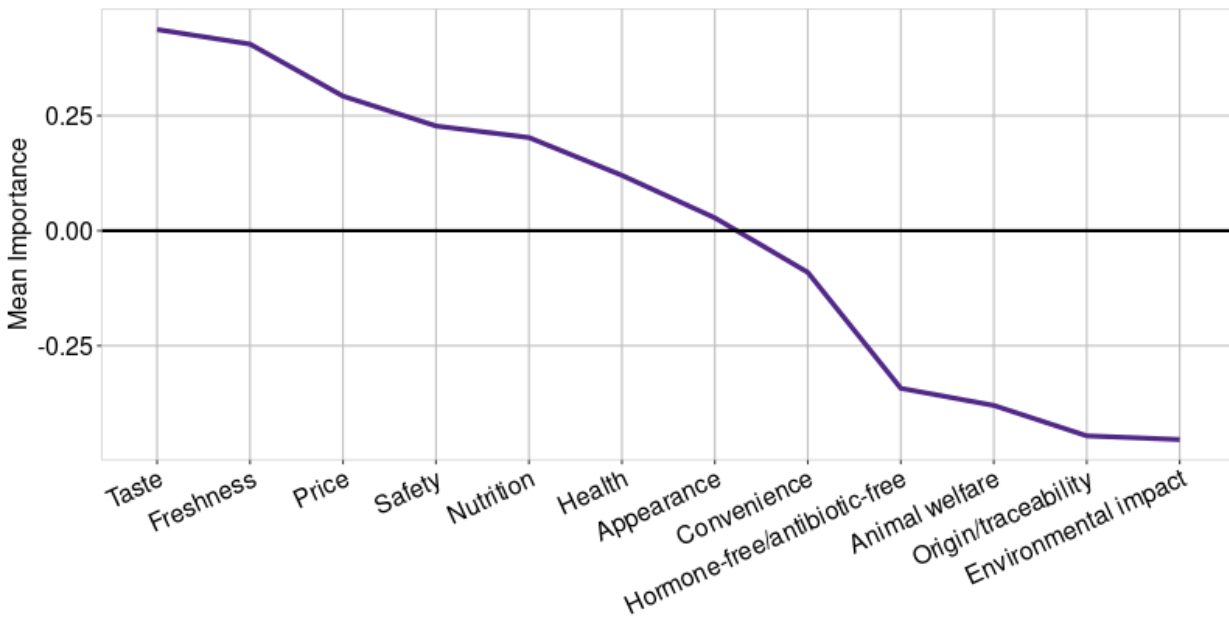
✓ 33,135 respondents in 2023

✓ Mean \$73.4k household income

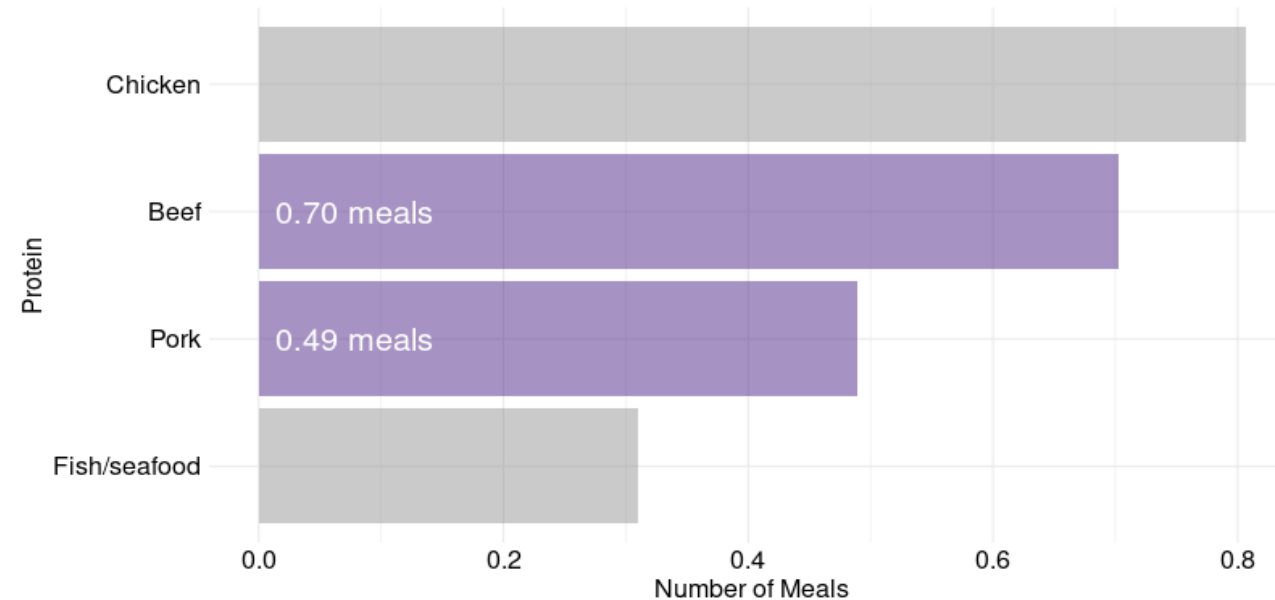
✓ Mean \$115 (\$68) at-home (away-from-home) weekly food expenditures

✓ 72% regularly consume meat, 11% flexitarian, 10% vv, 6% other

Protein Values
2023 - All States



Prior Day Meals
2023 - All States



State-Level Dashboard (Justin Bina)

<https://ksumeatdemandmonitor.shinyapps.io/MDMapp/>

✓ VIRGINIA (8.7 MILLION, 2.6% OF U.S. POPULATION)

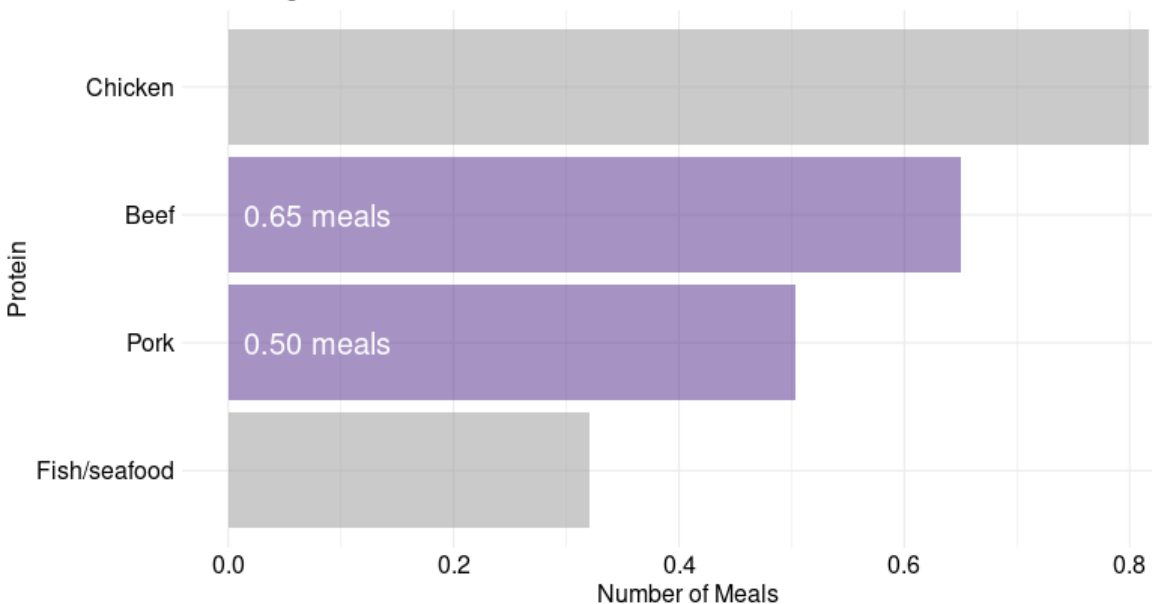
✓ 684 respondents in 2023

✓ Mean \$79k household income

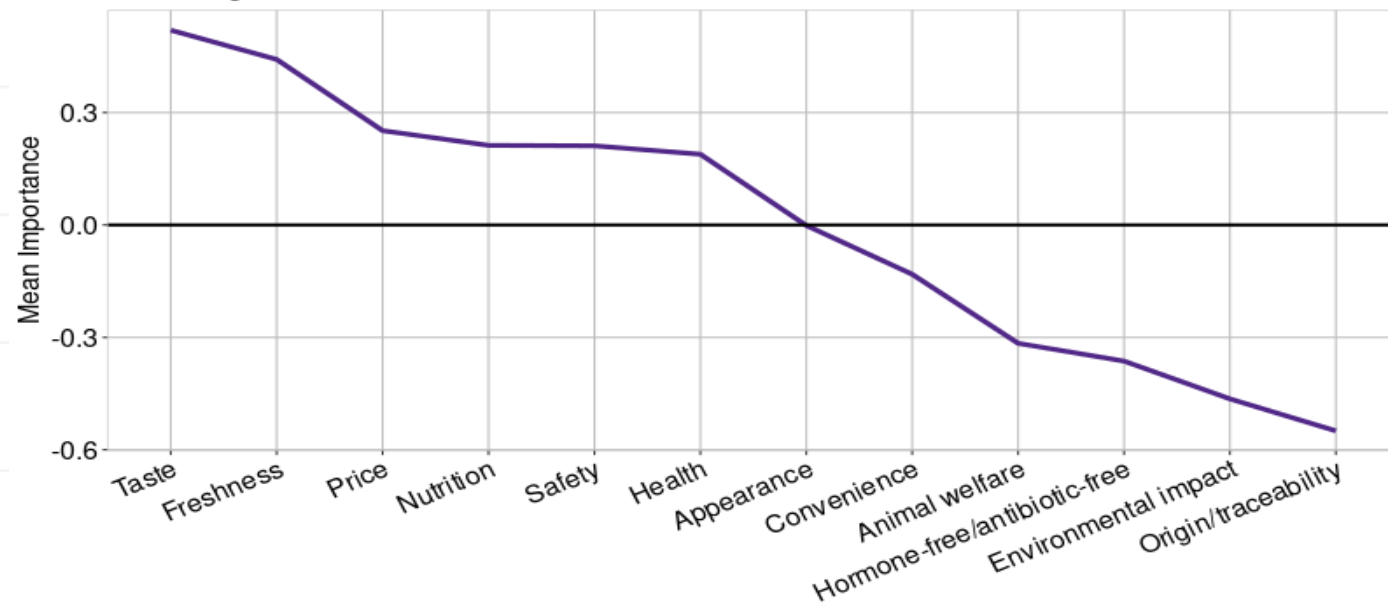
✓ Mean \$111 (\$68) at-home (away-from-home) weekly food expenditures

✓ 75% regularly consume meat, 11% flexitarian, 8% veg or veg, 6% other

Prior Day Meals
2023 - Virginia



Protein Values
2023 - Virginia



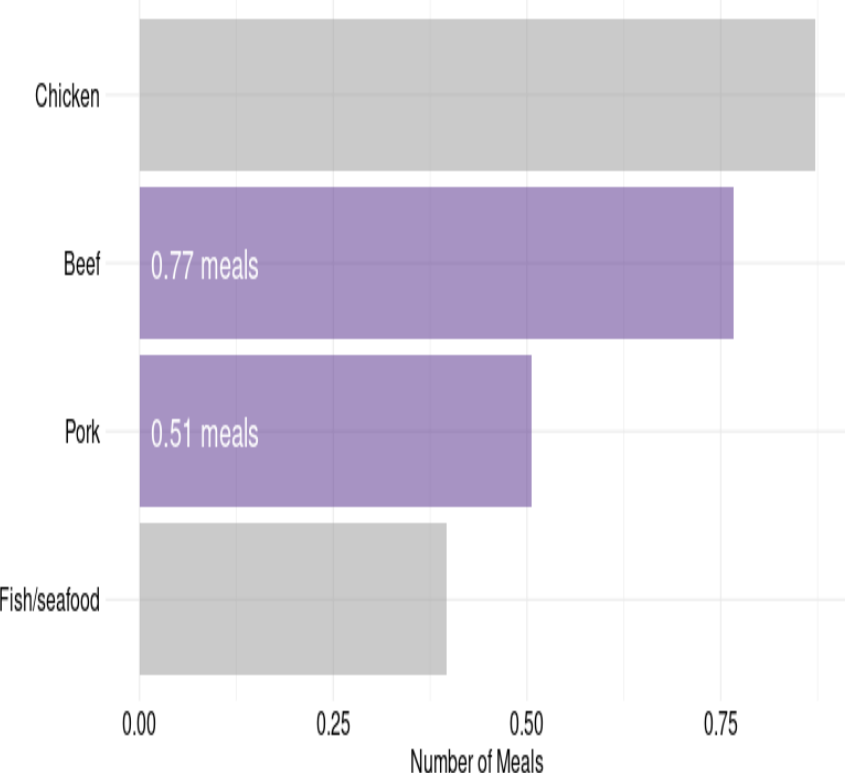
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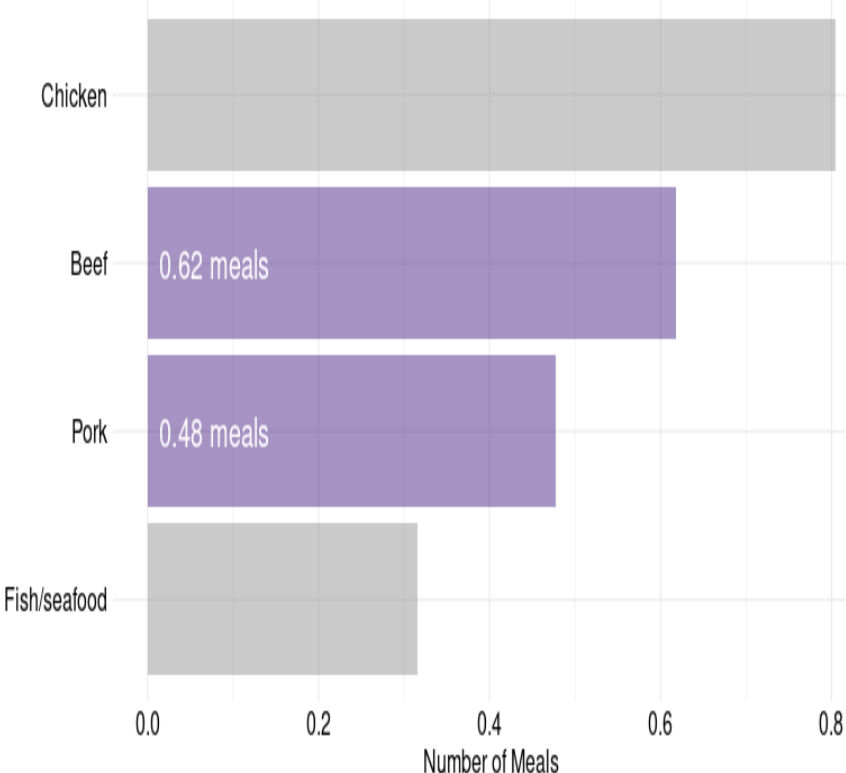
✓ CA, FL, & TX (COMBINE > 27% OF UNITED STATES POPULATION)

✓ 3,494 CA; 2,582 FL; & 2,853 TX respondents in 2023

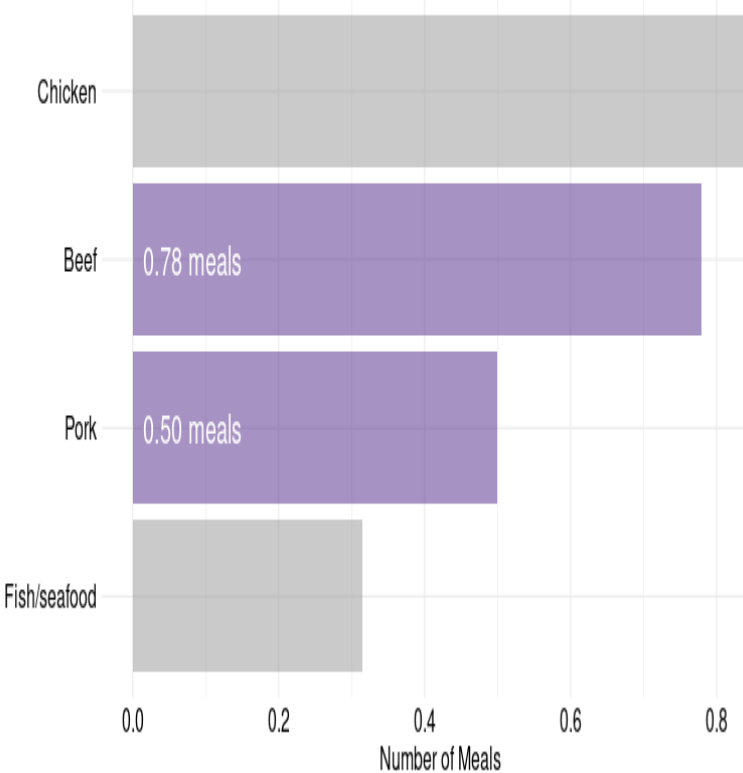
Prior Day Meals
2023 - California



Prior Day Meals
2023 - Florida



Prior Day Meals
2023 - Texas



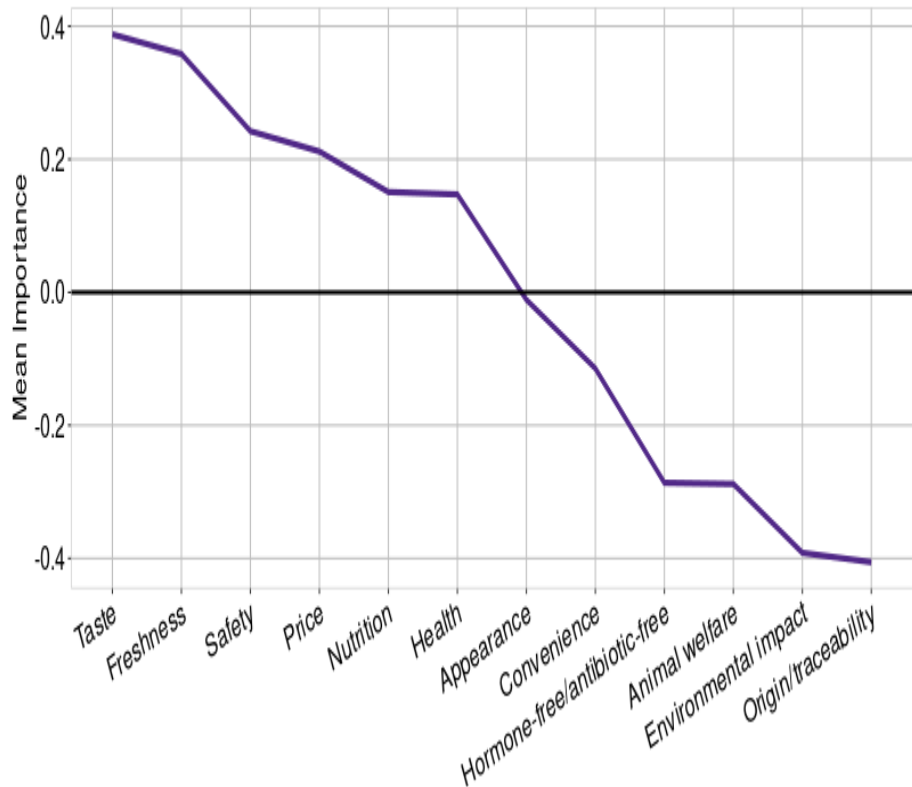
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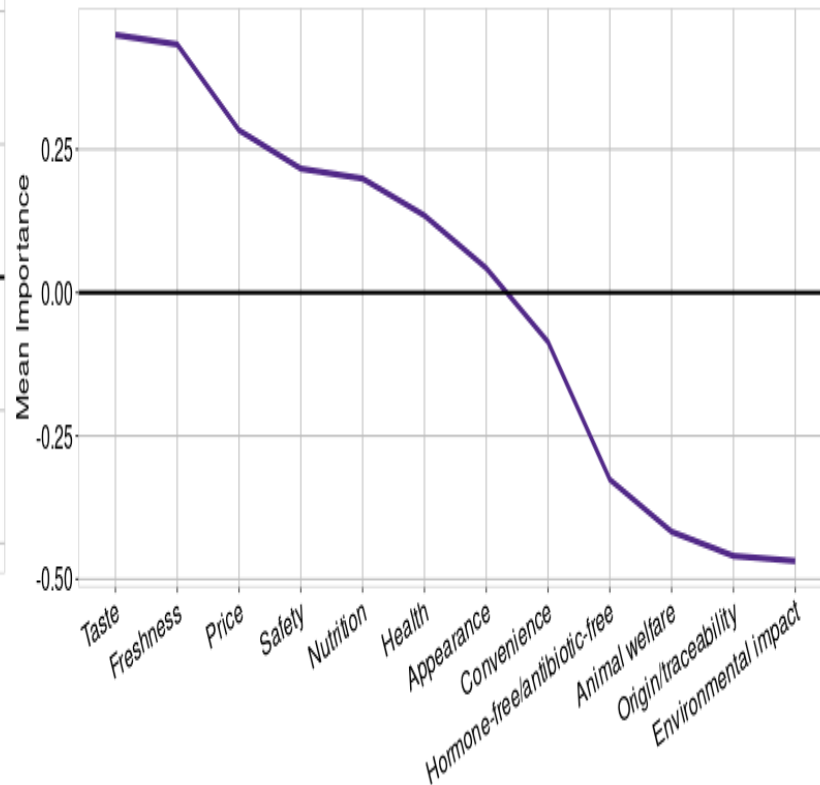
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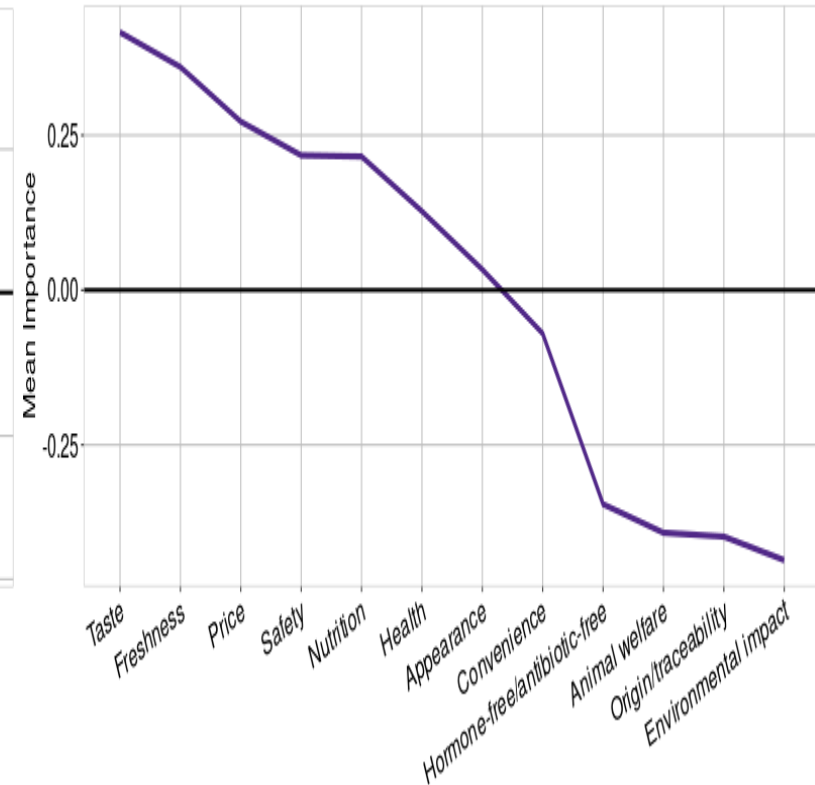
Protein Values
2023 - California



Protein Values
2023 - Florida



Protein Values
2023 - Texas



EXAMPLES OF HIGH-IMPACT

ACADEMIC ARTICLES, THESES, & DISSERTATIONS

- 8 peer-reviewed articles so far
- 1 KSU M.S. Thesis (Taylor, 2021) & 1 KSU Ph.D Dissertation (Anderson, 2023)
- MDM data currently being used in 1 PhD dissertation and 2 journal articles that are in review



EXAMPLES OF HIGH-IMPACT

The Washington Post
Democracy Dies in Darkness

ECONOMY Half cows, entire pigs: Families are buying meat in bulk to save money

Rising meat prices — up 11 percent from last year — are leading many to change purchasing and consumption habits

By Abha Bhattarai
August 27, 2022 at 6:00 a.m. EDT



RVMC 2023

RECIPROCAL MEAT CONFERENCE

https://www.washingtonpost.com/business/2022/08/27/inflation-meat-prices/?utm_medium=social&utm_source=twitter&utm_campaign=wp_main

<https://www.agweb.com/news/business/taxes-and-finance/us-now-officially-recession?>

Is the U.S. Now Officially in a Recession?



U.S. Farm Report 10/29/22 - Roundtable 1

By **TYNE MORGAN** October 28, 2022



International Meat Secret

EXAMPLES OF HIGH-IMPACT



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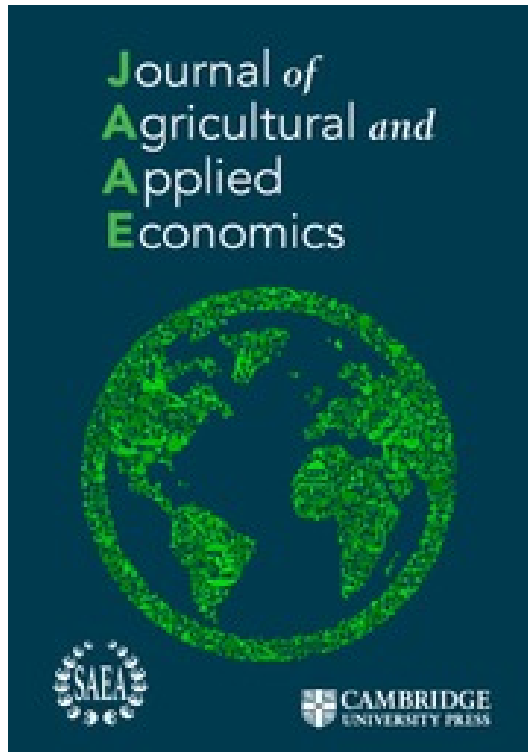


THANK YOU!

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WATCH FOR: #MDM

Extended Research Outcome Examples



COVID-19 Federal Aid &
Household Food Expenditures
Justin D. Bina, G. T. Tonsor, and
B.C. Briggeman. 2023.
doi:10.1017/aae.2023.31

MDM & Related Efforts Continue to Generate Research-Based Demand Insights...

Meat Science 190 (2022) 108843



Contents lists available at [ScienceDirect](#)

Meat Science

journal homepage: www.elsevier.com/locate/meatsci



U.S. perspective: Meat demand outdoes meat avoidance

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<https://www.sciencedirect.com/science/article/pii/S0309174022001115>



MDM & Related Efforts Continue to Generate Research-Based Demand Insights...

Received: 6 August 2021

Accepted: 17 April 2022

DOI: 10.1002/aapp.13287

FEATURED ARTICLE



Benchmarking US consumption and perceptions of beef and plant-based proteins

Hannah Taylor¹ | Glynn T. Tonsor² | Jayson L. Lusk³ |

Ted C. Schroeder²

<https://onlinelibrary.wiley.com/doi/epdf/10.1002/aapp.13287>