

Limiters of beef consumption

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Highlights

Compared to heavy users (who eat beef 3 or more times a week) and light users (less than once a week), moderate beef eaters (who eat beef 1 - 2 times a week) represent the best opportunity to increase beef consumption by one more beef meal per week.

Taste and enjoyment are the main drivers of beef consumption. If people are limiting their beef consumption, this suggests these consumers are depriving themselves of an enjoyable experience in favor of other perceived benefits.

A checkoff-funded study called Limiters of Beef Consumption evaluated consumer response to a set of 89 potential consumption limiters, about half of which represented things consumers may have seen, heard or read about beef with the remainder being issues consumers may have experienced in buying, preparing or eating beef.

Background

A perusal of the national consumer media, both traditional and online, on any given day generally will turn up more statements of reasons to limit beef use than reasons to increase beef consumption. Further, conversations with consumers through focus groups and discussions with industry thought leaders in the channel also elicit reasons why consumers limit beef consumption. One characteristic of many of these reasons is that they are based on misinformation. Another set of reasons is based on consumers having an unsatisfactory experience with beef.

The bottom line is that beef eaters limit their usage for a number of interrelated reasons that are unconnected to the taste and enjoyment of beef. This suggests these consumers are depriving themselves of an enjoyable experience in favor of other perceived benefits.

It is important to determine those things that are actually causing significant numbers of consumers to limit beef consumption. Learning the high impact limiters provides strategic support to development of consumer messages, consumer education on product selection and preparation to improve the eating experience, and provides direction to develop consumer education materials, new products, packaging and preparation methods designed to increase consumption.

Introduction

Consumer research over many years has shown that people love beef. Taste and enjoyment are the number one drivers of consumption. Yet, many consumers limit their beef use. Consumer tracking studies have found that 35 percent of consumers eat beef three or more times per week but there is a large group (37%) of moderate beef eaters who consume it 1 – 2 times per week. Eighteen

percent of beef eaters eat it less than once a week.

The moderates are a target group because they offer the best chance to increase consumption by one more meal a week. In addition, Millennials (younger consumers born from 1980 to 2000) are an important target because, at 80 million strong, they are larger than the Baby Boom generation and represent the consumers of the future. Millennials are similar in frequency of beef consumption to the total population: 36 percent eat beef 3 + times per week, 36 percent are moderate consumers and 18 percent eat beef less than once a week.

Discussion

Methodology – Research design

To develop the list of limiters, the market research team worked with NCBA's checkoff-funded project teams and compiled a list of limiters in the general areas of nutrition, preparation, price, sensory experience, production and social responsibility. This essentially was a compilation of all the reasons the program staff had seen, heard or read from any source as a reason to limit beef consumption. After initial lists were compiled, reviewed and edited there were

a total of 89 limiters identified for consumer testing. About half were in the category of things consumers may have seen, heard or read; half related to things consumers may have experienced with beef.

The Limiters of Beef Consumption survey was designed to determine:

- The current influence of 89 potential barriers to eating beef.
- The impact of individual limiters and tactics among a range of demographic and behavioral segments, particularly the key target groups of moderate beef eaters and Millennials.

The study was conducted as an online survey using a nationally representative sample of U.S. consumers between 18-75 years of age balanced for gender, age, ethnicity and region. A total of 3,048 consumers completed the survey between May 19 and May 31, 2012. Potential participants were excluded from the survey if they did not influence their household's grocery shopping, meal preparation or selection of away-from-home food choices. Data analysis focused on the effect of key limiters that negatively influence beef use overall and in the key sub-segments of Millennials and moderate beef eaters.

Methodology – Rating technique

Respondents were shown a screen with response categories ranging from "Never heard of this" to "I frequently limit beef consumption because of this." Limiters were presented to respondents randomly in the form of a card that appeared on the screen at bottom left. They were asked to read the statement, then click on the statement "card" and drag it to the category that best matches their belief about beef and any action they may have taken. Figure 1 is an example of the screen for rating information that consumers may have seen, heard or read about beef.

A top limiter is defined as one that causes 15 percent or more of consumers to frequently limit their beef consumption. The top ten issues that cause consumers to "frequently limit" beef consumption are detailed below (some Millennial limiters were ties so the total exceeds ten). Also noted in parenthesis after each limiter is the ranking when a "top two box" score is calculated – that is the combination of consumer ratings for 'frequently limit' and 'occasionally limit consumption.' The results are displayed for three audience segments: the total population of consumers, moderate beef eaters (1-2 times/week) and Millennials.

Price concerns

The highest impact limiters of consumption all related to price/cost (Figure 2). The effects of the recession which caused many consumers to adopt and retain frugal behaviors combined with recently rising beef prices resulted in the largest percentage of respondents in all three audience segments saying they frequently limit beef consumption because of price.

Figure 1

In the “deck of cards” to left on the next screen, the statements will appear one at a time. Please read the statement, then click on the statement “card” and drag it to the category that best matches your belief about beef and any action you may have taken.

Sample Card

It is not healthy to eat beef every day.

Your Belief and Any Action You May Have Taken

You had not previously heard of this	You have heard of, but do not believe this to be true	While it may be true, you do not limit the amount of beef you buy because of this	You occasionally limit the amount of beef you buy because of this	You frequently limit the amount of beef you buy because of this
(Place card here)	(Place card here)	(Place card here)	(Place card here)	(Place card here)

Figure 2

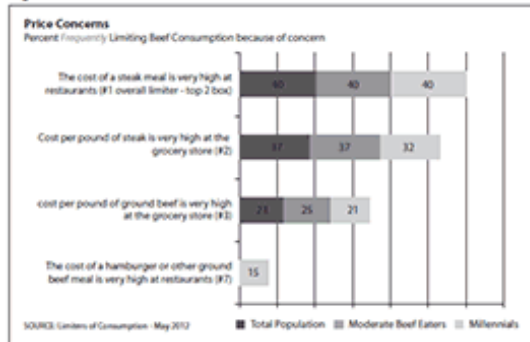
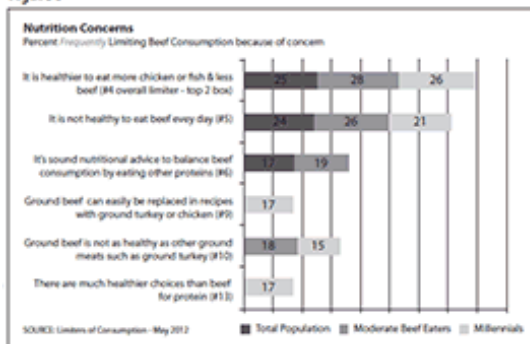


Figure 3



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The overall strongest limiter related to price is the cost of steak meals at a restaurant followed by the cost of steak at the grocery store. Even the cost of ground beef at the supermarket has become a limiter with roughly a quarter of all consumers and moderates and one in five Millennials citing this as something that limits their beef consumption. In addition, for Millennials (who eat out frequently and are concerned about costs), even the cost of ground beef and hamburger meals at restaurants is a top ten frequent limiter.

Nutrition concerns

Although the semi-annual Consumer Beef Index shows consumers believe beef is improving in the area of offering a balance of taste and nutrition, nutrition concerns remain a frequent limiter for many consumers (Figure 3). The belief that it is healthier to eat more chicken and fish and less beef is a frequent limiter for more than a quarter of all audience segments studied. The importance of educating consumers that beef can be an everyday food is illustrated by the belief of about a quarter of all consumers and moderates that it is not healthy to eat beef every day. One in five Millennials say they frequently limit beef use because of this concern.

For all consumers and moderates, a top ten frequent limiter is the belief that beef consumption should be balanced by eating other proteins. Top ten frequent limiters for Millennials include the belief that there are healthier choices than beef for protein and that ground beef can be substituted in recipes with healthier ground meats. Both moderates and Millennials frequently limit ground beef consumption because it is not as healthy as other ground meats such as turkey.

Preparation concerns

About half of the limiters are related to issues consumers may have

experienced in preparing or eating beef. Out of more than 30 preparation concerns tested including the areas of preparation difficulty, lack of beef options and knowledge confusion about cuts and preparation techniques, only two preparation issues were in the top ten frequent limiters list. Consumers said they frequently limited beef use because neither steak nor ground beef performs well in the microwave. A quarter of all consumers and moderates, and about one in five Millennials frequently limit steak use because of poor microwave results. Around one in five consumers also limit ground beef use for this reason (Figure 4).

Checkoff-funded research is addressing this issue in two ways. First, work is being done on developing innovative packaging that will allow beef to be microwaved with good results. For example, there is work on developing packages for frozen or fresh ground beef that use a thinner cut of product with a special built-in pouch to capture the grease. The microwave issue also is being addressed through development of tips and techniques designed to help consumers microwave beef using regular packaging.

Quality and safety concerns

The lean finely textured beef (LFTB) issue earlier in 2012 has left a negative impression with some consumers. LFTB is a top ten frequent limiter for all three audience segments studied with around one in five consumers overall and moderate beef eaters saying this is a reason for frequently limiting ground beef use. Seventeen percent of Millennials also cite this as a frequent limiter (Figure 5).

Consumers overall and moderates also frequently limit ground beef due to concerns about the risk of eating a rare burger. In addition, a top 10 frequent limiter for Millennials is their belief in the misinformation about factory farms and treatment of cattle related to hormones and antibiotics. Notably, this was the only production-related concern that showed up as a top 10 frequent limiter but it was in the top twenty overall on a top two-box score ranking.

Figure 4

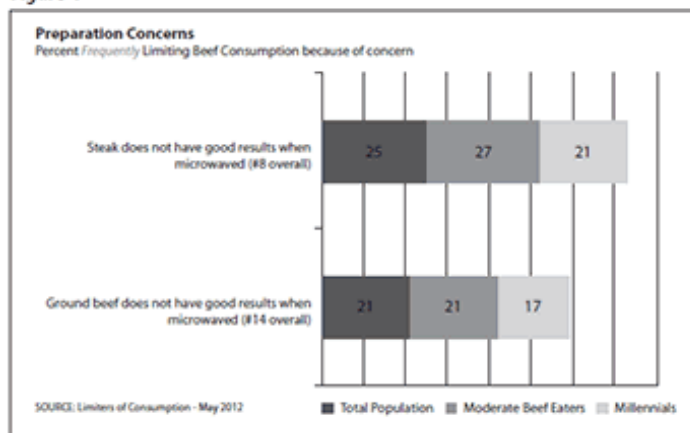
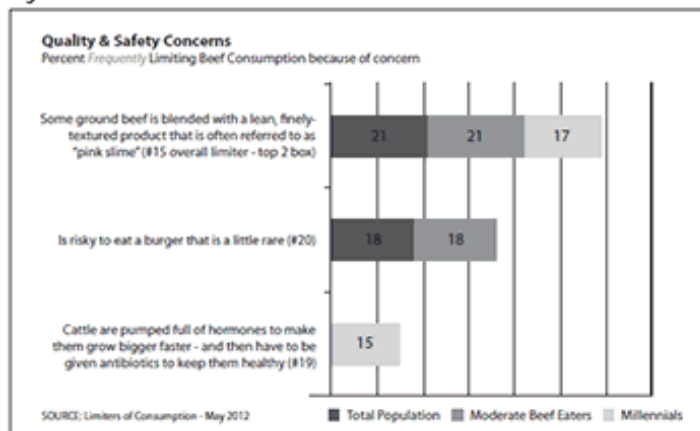


Figure 5



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Conclusions

Limiters with strong effects

Price and nutrition concerns are the major drivers of consumer restrictions of beef use.

The cost of steak, both at restaurants and at retail, is the strongest limiter of beef consumption among all segments. The cost of ground beef in grocery stores and, to a lesser extent, at restaurants, also is a strong deterrent to usage.

The widespread belief that it is better to eat more chicken and fish and less beef along with a concern that it is unhealthy to eat beef every day is driving about a quarter of beef users to limit their beef consumption. The healthfulness of ground beef also is a limiter. Giving consumers accurate information about beef's fat and calorie content and nutritional benefits is important to both help them make informed meat protein choices as well as reinforce beef's value.

Poor performance of both steak and ground beef in the microwave is a significant limiter. If this limiter is overcome it is likely consumers would think of beef more frequently for a work day dinner meal and increase consumption.

The only quality concern that appears as a limiter is related to lean finely textured beef (LFTB) and is a result of the strong media attention earlier in the year. This is likely to diminish as those concerned consumers adopt shopping behaviors that reassure them they are not buying products containing LFTB.

Concern about the risk of eating a rare burger is a top 10 frequent limiter for all consumers and for moderates while the issue of antibiotics and hormones is a top 10 frequent limiter for Millennials.

Limiters with weak effects

Among the hypothesized reasons beef eaters might be limiting the number of meals they eat that include beef, dozens are not significant in restricting usage. In addition, between nine percent and 22 percent of consumers are at least occasionally limiting their beef usage due to issues that more than half of beef eaters have never heard of or don't believe exist (Figure 6).

Figure 6

Hypothesized Limiter	% Frequently Limit*	% Occasionally Limit*	% Not Heard/Not Believed*
Raising beef cattle is a major contributor to global warming	4%	6%	71%
Beef production uses too much water --it takes 2,500 gallons of water to produce a pound of beef	4%	5%	71%
Feeding corn to cattle is unnatural & it makes them sick	6%	7%	69%
Beef cattle are raised in ways that harm the environment and are not sustainable	8%	11%	59%
Eating beef is likely to contribute to diseases like cancer	9%	14%	57%
Family farms are controlled by big corporations	6%	9%	56%
Beef cattle are confined for much of their lives in crowded pens where they can't walk around or exercise	10%	12%	52%
The use of antibiotics in raising cattle may decrease antibiotic effectiveness in humans who eat beef	12%	14%	49%
Beef cattle have a miserable existence being born and raised all their lives on "factory farms."	10%	12%	45%
The beef industry has consolidated into big factory farms and many family-owned ranches & farms are being eliminated	9%	11%	38%

*Total Population

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It should be noted that these claims are not unimportant given that as much as 20 percent of consumers say they at least occasionally limit beef as a result of a few of these concerns. However, even those that are essentially non-issues regarding consumption should be addressed as part of the industry's issues management efforts. While they may not be strong limiters of beef consumption, if they are embraced by influencers that have some influence on policy they can lead to misguided regulations and restrictions that make it more difficult for farmers and ranchers to raise cattle. In addition, those consumers who do believe this misinformation may be inclined to support such restrictions.

