

# Exploring Consumer Attitudes About Meat Products

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*NOTE: The following is a transcription of the discussion that occurred during this session, rather than a submitted paper from the authors.*

## Introduction

Dennis R. Buege

During my undergraduate and graduate school days, I frequently heard the statement that the meat industry is very tradition bound, it's very slow to make progress and it trails many industries in innovation and new product development. For the most part, the meat industry was a production-driven industry. It produced product, fabricated it in the same way it had been done for many years, pushed it in front of consumers and hoped that they would purchase it. For many years, this didn't work too badly.

In the 1980's, we learned that consumers have many choices of products that fit their lifestyles, attitudes, desires; and the hard realization hit the industry that meat wasn't always their first choice. This trend pushed the industry to become more market-driven. The two key elements of this orientation are first learning what the consumers want from their products, and then providing or tailoring products to meet those demands as much as possible.

An important part of this new industry perspective is defining or learning what the attitudes of consumers are so products can be directed in the proper direction. The purpose of this session is not only to provide you with information about current consumer attitudes, but to demonstrate how these attitudes are determined or defined. This will be a look into the science of learning what consumers think, and what directs their actions.

## Methods In Market Research For Assessing Consumer Preferences

Sheila Courington

As you already know, we are going to present a consumer

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focus group session today for you to observe. To help set up that session, I was asked to talk a little bit about market research because it's quite different from the other research you may be more familiar with. First of all, market research is the study of human behavior, and when you are studying people, it's a real different universe. Human behavior is influenced by an infinite number of variables, and what makes it even more difficult is that those variables are contextual. What affects behavior on Monday may or may not be the same factors that affect behavior on Wednesday. So there is a lot going on here that makes it very difficult not only to measure, but also to interpret.

Also, because you are dealing with people, you can forget controlled experiments. It is very rare to be able to do a controlled experiment on human behavior. You can't control what people do, what they eat, what they say, or what stimuli affects them. So you have to take the behavior in context, and because you can't do a controlled experiment, that really implies that you can never understand fully causality (cause and effect). Research on human behavior, and therefore market research, is 99% of the time correlative. You can only infer things about causality, you can never demonstrate it, and of course, causality is what we are all interested in.

A third difference is that market research, unlike much other research on human behavior, is task-oriented. Its goal is to solve marketing problems. It is not concerned with increasing knowledge, or improving the human condition. It is merely concerned with helping people market products. That sets it aside from most other science.

Market research as a field usually falls into two types of research: qualitative and quantitative. Examples of quantitative research which you might be familiar with are the Gallup polls, political polling that takes place during election periods and Nielsen ratings. These are all forms of quantitative research. But there's a whole world of quantitative market research that is transparent to the general public. Corporate America spends billions of dollars every year on quantitative survey research to find out what people do, what people think, what people feel, what they buy and why, and what factors condition their buying and consuming behavior. Unfortunately it is not an exact science, simply because of the factors I laid out earlier. The variables that you have to deal with are infinite in number and their effect varies over time. So even though people spend a lot of money on market research, what they come out with are probability statements. I tell people there are no facts when it comes to human behavior, and 99.9% of the time I will be right. There are only probability statements. So market research is directed at risk reduction. If I am a marketer and I am considering spending 50 million dollars developing and rolling out a new product, I want something to help me reduce the risk. Actually, I want something that will give me certainty. How-

ever, market research can't give me certainty. It can only give me risk reduction.

On the other side, there is something called qualitative research, and you are going to see an example of that today. Many people wouldn't consider qualitative research to be research at all. It is where you actually sit down with a group of consumers that you think are relevant to what you are trying to do, and you talk with them. You try to explore the cognitive structure, the attitude sets, the interrelationships between those sets, and understand some of the subtle nuances that drive human behavior. This type of research doesn't give you numbers but rather gives you impressions and feelings. It can be very powerful. It's used often as an exploratory tool when you are dealing with issues, and you don't know enough about those issues to create a survey. It's also used in areas where the information you want is too subtle for closed-end questions, such as multiple choice questions. You want to let the conversation flow and see what pops up. That's what we are going to do today. It's not a true focus group. It's a very artificial situation, because of the audience. It is a demonstration. We think you will hear some things today that will be interesting and exciting. But please don't walk away thinking this is a true definition of qualitative research, because this is somewhat of an artificial situation.

## Focus Group Presentation

John L. Huston and Sheila Courington

The focus group panel was composed of 10 female consumer representatives of the Starkville, Mississippi market. Panel members were told that the viewing audience was interested in the food business, but were unaware that they were associated with the meat industry. The panel was moderated by John Huston and Sheila Courington of the National Live Stock and Meat Board. Below are the primary questions asked of panelists:

1. How do you feel about grocery shopping?
2. If you could change one thing about a food store, what would you change?

### Video No. 1 — Convenience Media Clips

3. How much time are you willing to spend preparing evening meals?
4. What do you do to save time in cooking?
5. What kind of meat products make your life easier? What kind of meats are least convenient?
6. In a typical week, name the two most common meats you serve.
7. Are hamburgers and T-bone steaks the same kind of meat?

### Video No. 2 — Price-Value Media Clips

8. How do you economize at the grocery store?
9. When you want to reduce your overall spending,

where does food fit in as compared to other consumer goods?

10. Do you feel the foods you buy are a good value?
11. What foods do you feel are over-priced in the store?
12. Do you think about the producers of food products — are you concerned if they make a profit?
13. How much profit do you think is made on food (all segments of food chain)?
14. Do you think food prices are fair?
15. Do you think retailers make a reasonable amount of profit?
16. How much would you be willing to pay for organically-grown meat?

### Video No. 3 — Nutrition-Health Media Clips

17. How many of you have modified your family diet because of some health concern?
18. How many of you know your serum cholesterol level?
19. What is cholesterol? Where is it located in your body? What does it do to you?
20. How many of you have members of your family on a weight-reduction program?
21. Where is the fat located in meat?
22. What do you look for in selecting meat?
23. What grade of meat do you buy?

### Video No. 4 — Food Safety Media Clips

24. When you're in the grocery store, do you think about the safety of the food you buy?
25. Do you think our food supply is safe?
26. Who is a credible source of food safety information?
27. Do you think that an industry trying to make a profit is anti-consumer?
28. What category of foods (meat, dairy, vegetable, fruit, etc.) do you feel are the most and the least safe?

### Questions Asked of Panelists by Audience (source of question not identified):

1. When treating yourself to a special meal on an important occasion, what food would you choose to eat?
2. How do you feel about industry-sponsored research?
3. Which has less fat — a steak or a hot dog? How much fat is present in ground beef?
4. Do you accept as fact the food safety information presented in the media?
5. Between nutrition, safety and price, which do you rank as most important and least important in your food purchase decisions?

## Results of the Attitude Survey of AMSA Members

Sheila Courington

In conducting the survey of AMSA members, we asked similar questions of you that we asked of consumers on other surveys. While the result is not an exact comparison, I think what you're going to see is that some of your thoughts and attitudes and behaviors are not quite like those of the "normal" consumer.

One of the questions we asked you was "How often in a two-week period do you eat meat?" You reported about 9.16 times, or about 65% of your main meal occasions. On average, the American consumer eats meat about 6.1 times during a two-week period, or about 43% — significantly less than you do. We also asked consumers about their motivations — the things that drive them to buy what they buy when it comes to meat (Table 1). Taste turned out to be Number 1, with consistency slightly lower. These were followed by price, how much it "seems" like home cooking, nutrition, convenience, and so on.

**Table 1. What Motivates People to Buy?**

<i>Motivator</i>	<i>National Rank</i>	<i>Your Rank</i>
Taste	1	1
Consistency	2	2
Price	3	4
Home cooking	4	5
Nutrition	5	3
Convenience	6	6
Fat/cholesterol	7	7
Modernity	8	9
Microwavability	9	8

What ranking did you give them? What's most important to you? Well, you ranked them quite close to the American consuming public, with only two slight deviations. Consumers ranked "home cooking" #4, and you ranked it #6, and the reverse for convenience. Rankings based upon your own motivations turned out to be pretty much as the American consumer ranks them.

But now let's look at some related factors, and check to see how well you read the American consumer. When we list factors that determine purchase behavior, we're really trying to look at a broad spectrum of quantifiable variables, and we can then go through many sophisticated gyrations attempting to segregate out the factors that seem to drive behavior. We're not talking motivation now — we're talking about other factors that are strongly associated or disassociated with motivation. We asked you what you thought were the important factors. This is the order you gave us (Table 2), along with the order the consumers gave us. As you can see, you really struck out!

You thought income was Number 1. Well, in reality, educa-

**Table 2. What Factors Determine How Much Meat We Eat?**

<i>Ranks</i>	<i>Your Factors</i>	<i>True Factors</i>
1	Income	Education
2	Urban/rural	HH size
3	Age	Occupation
4	Region	Age
5	HH size	Income
6	Education	Urban/rural
7	Occupation	Region

tion is an extremely strong driving factor determining what people eat, including the types of meat they select. For consumers, household size was very important. Occupation was Number 3, and age was Number 4—that was your closest match at #3. Income was actually Number 5 in the eyes of the consumer, which you thought was Number 1. So the ranking you gave may have been logical, but when you look empirically at what's out there, it just didn't work.

We asked about some attitudes about meat, such as, "Do you agree with this statement: A main meal must include meat?" Seventy-two percent of you said yes; only 24% of the consumers said yes (Table 3).

**Table 3. Attitudes About Meat**

	<i>Yourselves</i>	<i>Consumers</i>
Meal must include meat	72%	24%
Best part of meal	92%	25%
Healthier than other foods	89%	12%
Fits reduced fat diet	82%	54%
Avoid cholesterol	46%	48%
Buy more if less expensive	27%	13%

In the next question, 92% of you felt that meat is the best part of a meal. Well, only 25% of the consumers agree with you. But 89% of you feel that meat is healthier than many other foods you might eat—only 12% of the consumers agree.

Eighty-two percent of you feel that meat can fit into a reduced fat diet—54% of the consumers would agree with that. In terms of cholesterol, you're just about equal with the consumers as to the percentage who say they're avoiding cholesterol. And, finally, price appears to be a greater factor for you than it is for the consumer group—I'm not really sure why that is!

This has been a light-hearted approach, but it's real numbers and it's real responses used to illustrate why we survey consumer groups like this, and why we commit checkoff funds to this type of research—doing quantitative market research that permits us to project consumer attitudes across the country.