

midan
MARKETING
a vision for meat



Meat Consumer Segmentation



ANNUAL
MEAT 2017
CONFERENCE

Background

- Today's consumers are very diverse in their attitudes, behaviors, knowledge and available time. This diversity translates to a wide range of approaches to purchasing and preparing meats, and makes it more important than ever to understand and target meat customers.
- To help the meat industry expand its knowledge of this diverse meat consumer base, Midan Marketing conducted a comprehensive meat segmentation study. The goal of the research was to determine how many distinct consumer segments exist within the U.S. market and to develop the most effective methods to market directly to each segment.



Methodology - Sample

- A 25-minute online survey with 2,200+ consumers was conducted December 2-14, 2016
- The sample was a national representation of U.S. adult consumers aged 18+ who have eaten meat at home during the past three months
 - *Meat eaters (including pork, beef, chicken)*
 - *Adults aged 18+, with proportional representation of generational cohorts by gender*
 - Gen Next (18-19)
 - Millennials (20-30)
 - Gen X (40-50)
 - Boomers (51-56)
 - Seniors (70+)
 - *Representative split by four census regions. Balance age groups, gender, ethnicity within each region.*
 - *Ethnicity - Ensure proportional representation of ethnicities*

Questionnaire Outline



25-minute Questionnaire



1. Screening

- Recent survey participation
- Excluded occupations
- Gender
- Age
- State/region
- Ethnicity and race
- Income
- Device access
- Past 3-month meat consumption
- Confidentiality



2. Attitudes & Usage

Category usage habits

Frequency, quantity, trend and why

Brand dynamics

National brand vs. private label

Shopping behavior

Retailer choice and drivers, purchase frequency, products purchased last, pre-shopping and in-store behavior, spending on groceries and meat, shopping attitudes.

Most recent meat preparation and consumption

3. Segmentation Attitudes

Agreement scales with attitude statements about meat, shopping, meal preparation



4. Media/Technology & Demographics

- Media and technology access
- Marital status
- Household size
- Kids in household
- Education
- Employment
- Household income
- Area density



Constructing the Meat Consumer Segments



A segment is a definable, accessible and actionable target group of consumers.

Each segment holds a discrete set of beliefs and exhibits a specific combination of behaviors in order to move from interest in meat to eating it.

Everyday meat attitudes were entered into our segmentation model ...

- General love of meat
- Meat characteristics
- Meat shopping attitudes
- Role of meat brand
- Value
- Meat preparation
- Environmental factors
- Cultural/social influences

Six Meat Consumer Segments

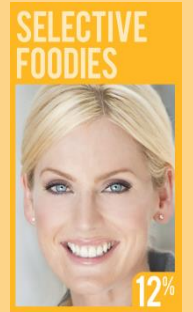
Premium Players

Meat is a vital part of their lifestyle and they will pay more for the meats they want. They enjoy ethnic meals that include meat, and they use pre-prepared meats because they are convenient. They believe non-meat proteins are acceptable substitutes for meat proteins.



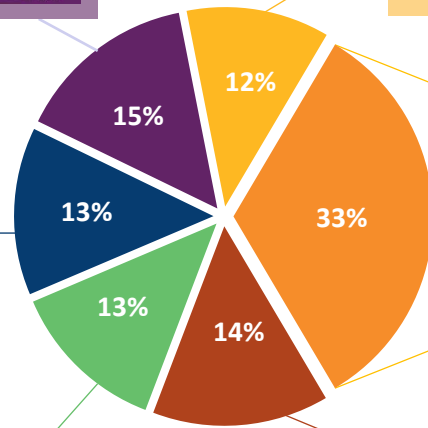
Selective Foodies

Cooking gives them a sense of accomplishment, so they spend the most time preparing meals to please their family, using national brands and known products that they trust. They choose nutrition over convenience, and quality over price. They are less concerned with environmental issues.



Aging Idealists

Meat eaters who are interested in health and sustainability. They look for specific types of meat like USA-sourced, grass-fed or humanely raised. They try to avoid additives. They are less motivated by promotions, despite lower income.



Urban Eclectics

Millennials and Gen-Xers looking for convenience, protein shortcuts, streamlined shopping and cooking. They value the certainty provided by national brands. They tend to eat meats, especially chicken and beef, based on cultural traditions and across multiple dayparts.



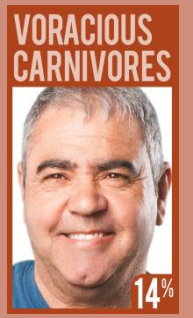
Wavering Budgeteers

Meat eaters but constrained by income and budgets. When shopping and eating, they look for the cheapest possible options. They use coupons and look for promotions in circulars and at the point of sale.



Voracious Carnivores

Love meat and consider it to be the essential main dish of their meals. Appreciate the taste, energy, nutrient and filling aspects of meat and enjoy sharing meat with their family.



Three Meat Consumer Sub-Segments of Urban Eclectics

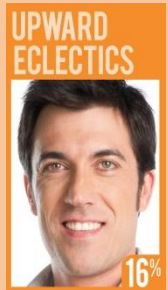
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Upward Eclectics

Urban meat lovers with young families who are increasing their consumption because they don't want to give up the taste of meat. They are looking for streamlined, convenient shopping and quick meal preparation due to heavy time pressures.



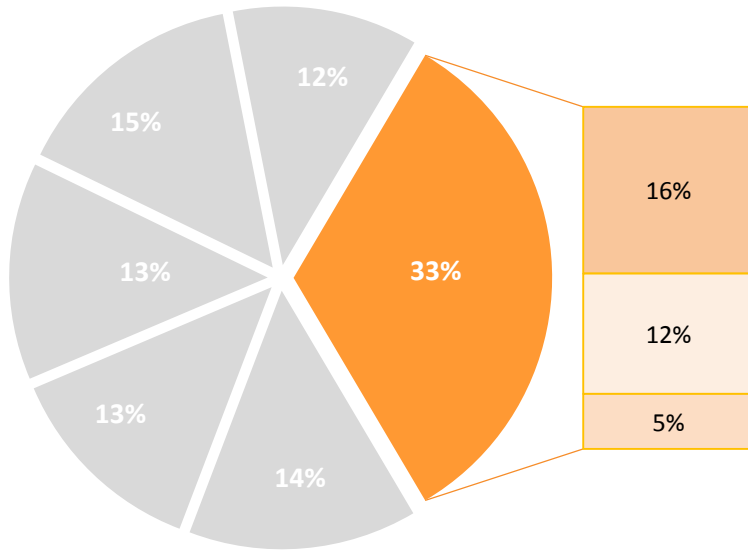
Earthbound Eclectics

Higher income Millennials looking for healthy, sustainable, humanely-raised meats which are also a convenient path to simple, quick meals. They are interested in all-natural foods with no additives. They stay on a strict budget.



Hesitant Eclectics

Average income Millennials who are wrestling with budget constraints and are apt to look for alternatives to meat. While they eat a lot of meat, their attitudes toward meat and agriculture could potentially negatively impact their use of it in the future.





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