2017 Annual Meat Conference
Questions and Answers – Meat Consumer Segmentation
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Did any of the segments skew toward any particular store formats?

Supermarkets are the most frequently used store format across all segments, but Urban Eclectic index low on supermarkets and high on supercenters.

Are there volume numbers (pounds purchased) for each segment?

We did not collect this information. The foundation of this research is based on self-reported behavior and attitudes.

Did any of the groups hold more negative perceptions of meat, or types of meat? If so, who and what were the perceptions?

Voracious Carnivores are most positive about meat; Earthbound and Hesitant Eclectics (Urban Eclectic sub-segments) are the least positive.

Which consumer segment can most likely be influenced to purchase more beef?

The Urban Eclectics (Upward and Earthbound Eclectics) represent the biggest opportunity for beef. They indexed high on their intent to increase consumption of beef as compared to the other segments.

How much of the sample population was the primary grocery shopper for the household?

95% of the 2200 consumers surveyed.

What is the connection between "how you like your job" and meat consumption?

Lifestyle and psychographic attitudinal statements such as "I like my job" are combined with attitudes about agriculture, food and meat in order to gain a broad understanding of consumers' psyches and what may drive their decisions and behaviors.

What provides more relevant data: traditional segmentation (age, sex, income, ethnicity,…) or psychographic (individualized) segmentation that tends to blur these lines?

Psychographics create the segmentation dimensions, while demographics are used to classify. They are complementary.

Which segment has the highest meat spend per capita?

We did not collect this information. The foundation of this research is based on self-reported behavior and attitudes.

Methodology question: how did the survey participants track the meat they eat/purchased over the three month period? I cannot remember what I ate two days ago let alone over three months ago.

All purchase and consumption data was collected based on recall and perceived purchase and use.

Why do you refer to Voracious Carnivores as males (he, him, etc.) when the gender breakout was split almost evenly?

It is a common practice to assign segments a "profile" that includes a name and face. Since Voracious Carnivores skewed toward the male gender, we chose to assign it a male profile.

I don't see any targeting, but rather messaging. Where is your targeting? Feels like a big missed opportunity.

When we discussed opportunities during the presentation, we focused on where, when and how to engage consumers within each segment. The targeting comes into play when you use our full survey, or the shorter version (Meat Segmentation Tool), to actually segment a specific group of consumers you are interested in engaging (by store, market, region, demographic, attitudes, etc.).

Which segment will more likely use any of the online ordering services?

Based on reported shopping preparations, the Urban Eclectic segments are most likely to use online ordering services.

How many conference attendees filled out the survey?

The industry sample was 85. This is a very small sample, and was not meant to be representative of the audience or the industry. The industry survey exercise was designed to help audience members understand a little about the types of questions that were used to identify the segments and to have a little fun by relating to one of the segments during the presentation. (Note that only a small set of the total questions and data were used to make the industry segment assignments.)

What was the total number of participants and breakdown by region? How was the survey distributed?

The sample per region was proportional to the census breakdown. Northwest: 18%; Midwest: 22%; South: 37%; West: 23%

Did you ask about birth year to define generations (more accurate)? Or are you just generalizing by age group?

Respondents provided their exact age. We rolled up ages into generational cohorts, which included Millennials (20-34), GenXers (35-50), Boomers (50-65), seniors (66+). We also have GenZs (18-19) but their sample size was not substantial enough to allow for an analysis as a group.

Big miss around Hispanics. Only one group. Not surprising that there could be sample bias. What percent of your total sample was Hispanic?

Hispanics made up 21% of our sample, which is fairly representative of the national population. While one group, Urban Eclectics, indexes high for Hispanics, all groups have a solid representation of Hispanics. Voracious Carnivores had the lowest percentage at 13%.

These segmentation insights are critical in tracking/understanding the moving consumer target. The solutions to "winning" them however, seem age-old. Haven't we always tried to bring convenience and cause brand loyalty? What does this research really lead us to do differently than what we've been doing to promote meat for years?

The traditional approach to attracting consumers is through messaging. Often the platform for messaging is general and attempts to draw the attention of many different consumer groups, all having very different needs, perceptions and behaviors which lead to different purchase drivers. This segmentation provides an opportunity to microtarget through a better understanding of different consumer groups or segments. Once we understand what behaviors, perceptions and demographics define each segment, and also what makes each segment different from the others, we are able to better understand the type of activities and messaging that will resonate for each. Our task then is to understand which segments are our targets, and develop a marketing and merchandising plan that will effectively resonate for them.

Is the Voracious Carnivore more heavily influenced by in-store displays meaning bigger/wider displays?

Compared to other segments, Voracious Carnivores are less likely to be influenced by in-store displays. We do not have information on size of display.

What percentage of wavering budgeteers were Hispanic (that wasn't mentioned)?

20% of Wavering Budgeteers were Hispanic.

Talk about Urban Eclectics and animal and environmental impact on their eating decisions.

Earthbound and Hesitant Eclectics have the strongest opinions about animal welfare and the environment. These perceptions will have an impact on their protein use. Additional analysis of the segmentation results specific to these drivers can be completed that would provide more insight into what we can do in our messaging and merchandising to make these sub-segments more comfortable with meat proteins.

Can you speak to protein type skews for these segments? Are any averse to red meat with preference for white?

We have extensive data on stated past purchase frequency and use for all proteins by segment. Please contact us for further information.

Where is the "Urban Poor"- those that are seeking food for fuel vs. most segments in your survey who were all looking for food for experience?

All segments have various income and urbanization levels. The Wavering Budgeteers, for instance, have the lowest average income ($61K) and 33% of them live in urban areas. Another 42% are in the suburbs. Even Urban Eclectics include a lower income set of consumers (27% make >$50K annually), and 62% of them live in urban settings. Keep in mind that the segments are based on psychographic, attitudinal, behavioral AND demographic variables.

If you were a retailer, how would you tactically address these segmentations?

Retailers should first determine which segments you have as your customers. Then use the extensive psychographic, attitudinal and behavioral information we have on each segment to differentiate yourself by developing messaging that is targeted and not generic, and to understand where and how to best communicate messages that will stand out from a noisy marketplace.

Is the crux that we should focus on millennial marketing? Because it seems like that would cover all the other groups.

Millennials appear to provide the most growth opportunity and they are also the most vulnerable; however, don't lose sight of our current base represented mostly by Voracious Carnivores and Wavering Budgeteers, in addition to Urban Eclectics.

From the Meatingplace article: What I see is almost all consumers want antibiotic free and definitely hormone free today but the quandary is price point. Some are not savvy enough to know what the animals they consume are fed, case in point the pig population. How do they ditch the commodity meats that are lower priced compared to the higher priced free-from meats? Therefore many still consume those meats because of affordability. The meat industry is losing consumers because of it and non-meat protein alternatives are available without antibiotics or hormones. THAT should be the message driven to the meat industry and retailers and foodservice. Problem is it is moving too slowly vs the loss of consumers. The free-from product segmentation only points out that the commodity products are a question for consumers. The baby boomers who don't give a crap will be dead in another 10 years and the younger consumers who are not willing to accept the commodity products will rule. So what are you doing to face the future instead of simply accepting the current segmentation? http://www.meatingplace.com/Industry/News/Details/71752

Some excellent points are made in this comment to a Meatingplace article on our segmentation research. Many (most?) consumers are very uneducated when it comes to understanding all the claims and practices we provide for meat products today. Our biggest opportunity, particularly with the Urban Eclectics (most of whom are Millennials and GenXers), is to be totally transparent about production and processing procedures, and make information easily accessible. They will look at the information and use it to make decisions. Their willingness to purchase products that have claims they align with will be impacted by their comfort level in understanding what the claims mean, and that we are staying true to those claims. Our consumer research shows that education and transparency are key. As an industry, we need to embrace the challenge of providing both to consumers, no matter where meat protein choices are made. If we fail to adapt, consumers will seek out alternatives that they feel better about eating and preparing for their families and our numbers will decline.