

# Consumer Image Index

October 2015



**PELEGRIN**  
RESEARCH GROUP



Funded by the Beef Checkoff.

# Background and Objectives

- In early 2012 the beef checkoff developed and launched the Consumer Image Index (CII) program to track consumer perceptions related to the beef industry's handling of issues related to social responsibility, ethical food production and sustainability.
- Analysis of the initial results of that first wave led to fine-tuning of the social consciousness measures and redefinition of the CII target segments, and a second beef checkoff funded wave was conducted in October 2012, to serve as a benchmark for ongoing trending.
  - The CII program of monitoring consumer perceptions has continued annually, including the current October 2015 survey wave.
- The specific objective of the research is to better understand changes include:
  - Beliefs and attitudes about the beef industry relative to other industries overall and among “socially conscious” target segments

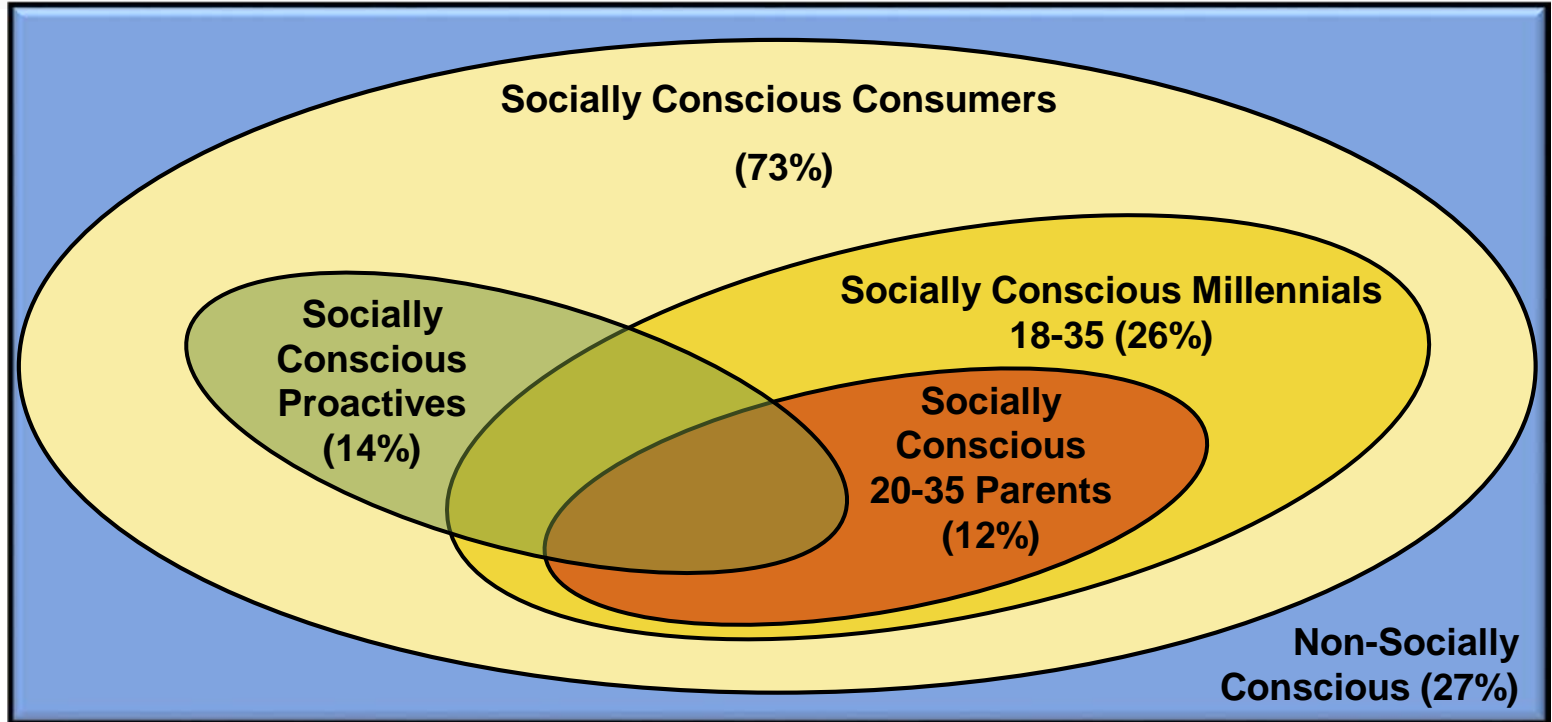
# Methodology

- Continuing the methodology used for the CII surveys conducted in 2012-2014, participants from a nationally representative sample of U.S. consumers, balanced for gender, age and ethnicity, were screened to be:
  - 18-65 years old
  - Involved in household grocery shopping and meal decisions
  - Within standard security screening
- The current wave of 1,203 consumers was conducted online October 26<sup>th</sup>-November 5<sup>th</sup>, 2015, with trending analysis for the total sample and the target samples of:
  - Socially Conscious (SocCon) Proactives, 14% incidence (N=164)
  - Socially Conscious (SocCon) 18-35 Millennials, 26% incidence (N=316)
  - Socially Conscious (SocCon) 20-35 Parents, 12% incidence (N=145)
- The trending analyses for the SocCon Millennials and SocCon Parents were examined on a “cohort” basis this year, with the age range reported shifting with the cohort from 2012 (18/20-32), 2013 (18/20-33), 2014 (18/20-34) and 2015 (18/20-35).

# 2015 Market Segments

N = 1,203

Total 18-65 Year Old Consumers



**Socially Conscious Consumers** – Consumers who do one of the following:

- A) Consider three or more of 16 specific U.S. meat industries' actions extremely important for Safety, Animal Welfare, Industry Ethics or Environment – with at least one “extremely important” in three or more of the four areas [Q.16] OR
- B) Have at least two SocCon qualifying psychographic characteristics and/or have done action items Q.30/31 detailed in Appendix OR
- C) A combination of considering at least two qualifying meat industries' actions “extremely important” (“A” above) AND have at least one of the qualifying characteristics or behaviors described in “B” above

N = 164

**Socially Conscious Proactives**

N = 316

**SocCon 18-35 Millennials**

N = 145

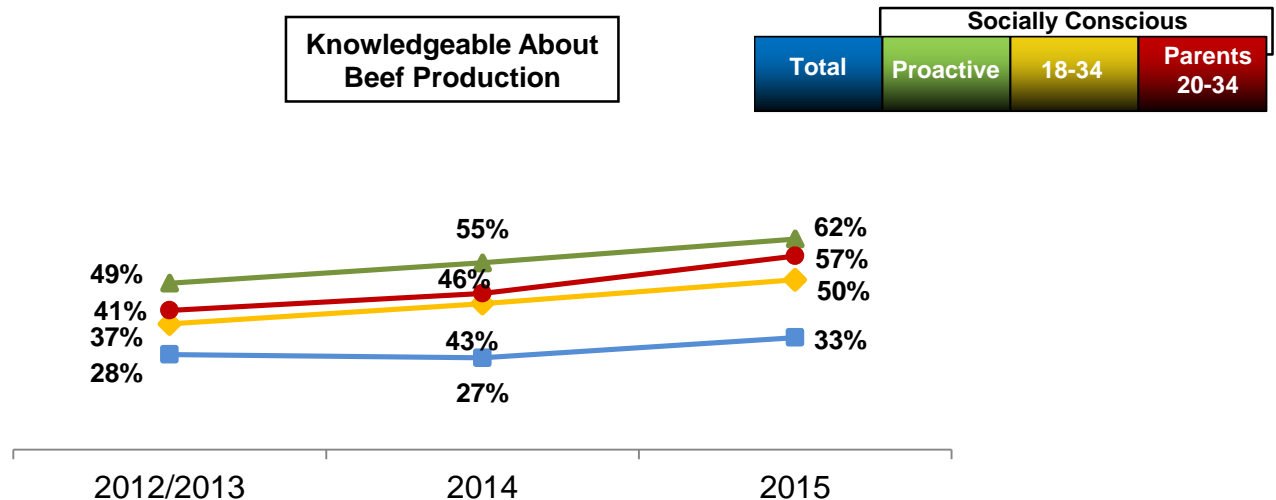
**SocCon 20-35 Parents**



# Executive Summary & Conclusions

The American public is becoming more knowledgeable about beef, chicken and pork production practices

- There are significantly more consumers who feel knowledgeable this year than in previous years.
  - This year, American consumers are more likely than in previous years to agree that the industry is openly sharing information.
  - Only one-in-five Americans have “never really heard anything about the U.S. meat industries’ production practices.”



# Executive Summary & Conclusions

## Positive attitudes about beef are gaining strength

- Messaging from the beef industry and other sources is favorably influencing the American public.
  - While attitudes about poultry practices are generally more negative, prime target consumers continue to hold largely favorable impressions of the American beef industry's performance on all aspects of production.
- Despite very favorable opinions, consumers stop short of highly “trusting” the cattle industry (most are more neutral).
  - Socially Conscious Millennial Parents are most trusting of the beef industry, with around four-in-ten feeling that the industry is very trustworthy with respect to all or most of their practices.
  - Among Socially Conscious Proactive targets and the general public, only about 1/3 trust that the beef industry is acting responsibly with respect to food safety, animal welfare, the environment and the use of antibiotics/hormones.
- Consumers who feel that the negatives of beef strongly outweigh the positives of beef (Bucket 4) remain a small minority at 10% of the general public.

# Executive Summary & Conclusions

Rather than just “trusting” industry-provided facts, consumers check for themselves

- The prime Socially Conscious Proactive target sees information about meat industries from a wide variety of sources, with an average of 6-7 different channels used.
  - These most often include documentaries, social media posts, health-oriented websites, TV or Internet news/news magazines, food labels, government reports and word-of-mouth.
- The relative strength of any individual source is moderate – meat industry websites being no more or less influential than other sources.

# Executive Summary & Conclusions

## Food safety concerns are paramount

- Reports and studies regarding some facets of beef and beef production can have notable positive impact on target consumers.
  - These areas include a focus on iron, B-vitamins, zinc, protein, cholesterol lowering diets, lean cuts, environmental impact improvements, updates about saturated fat and humane animal treatment.
- These eight positive “messages from the market” are relatively equal in terms of both creating a more positive impression of beef and making consumers inclined to eat/serve beef more often.
  - Target consumers are more favorably influenced by all the facts, perhaps because they are most likely to recognize them as credible and important.

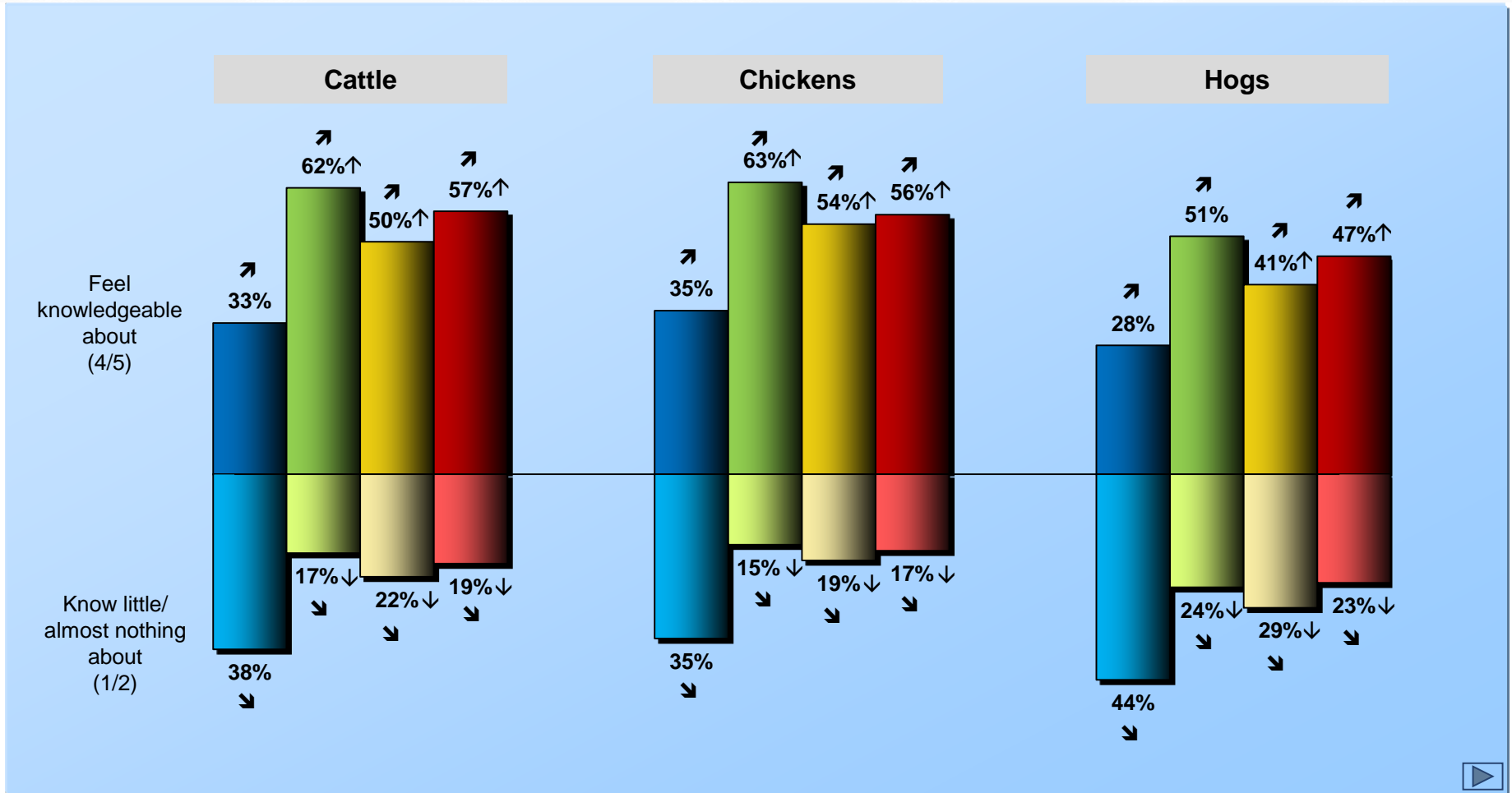


# Executive Summary & Conclusions

Socially Conscious Proactive consumers, a core target group, continue to be engaged in both beef enjoyment and taking action for their beliefs and causes

- One of the actions they are *not* taking is decreasing their beef consumption.
  - Neither do they aspire to a greater extent than the general public to decrease their beef consumption in the future.
  - Fewer this year feel that the positives of chicken strongly outweigh the negatives and they are increasingly feeling that the negatives of pork outweigh the positives.
    - Meanwhile, general beef perceptions (the product “Buckets”) are unchanged.

# Knowledge About Production Practices

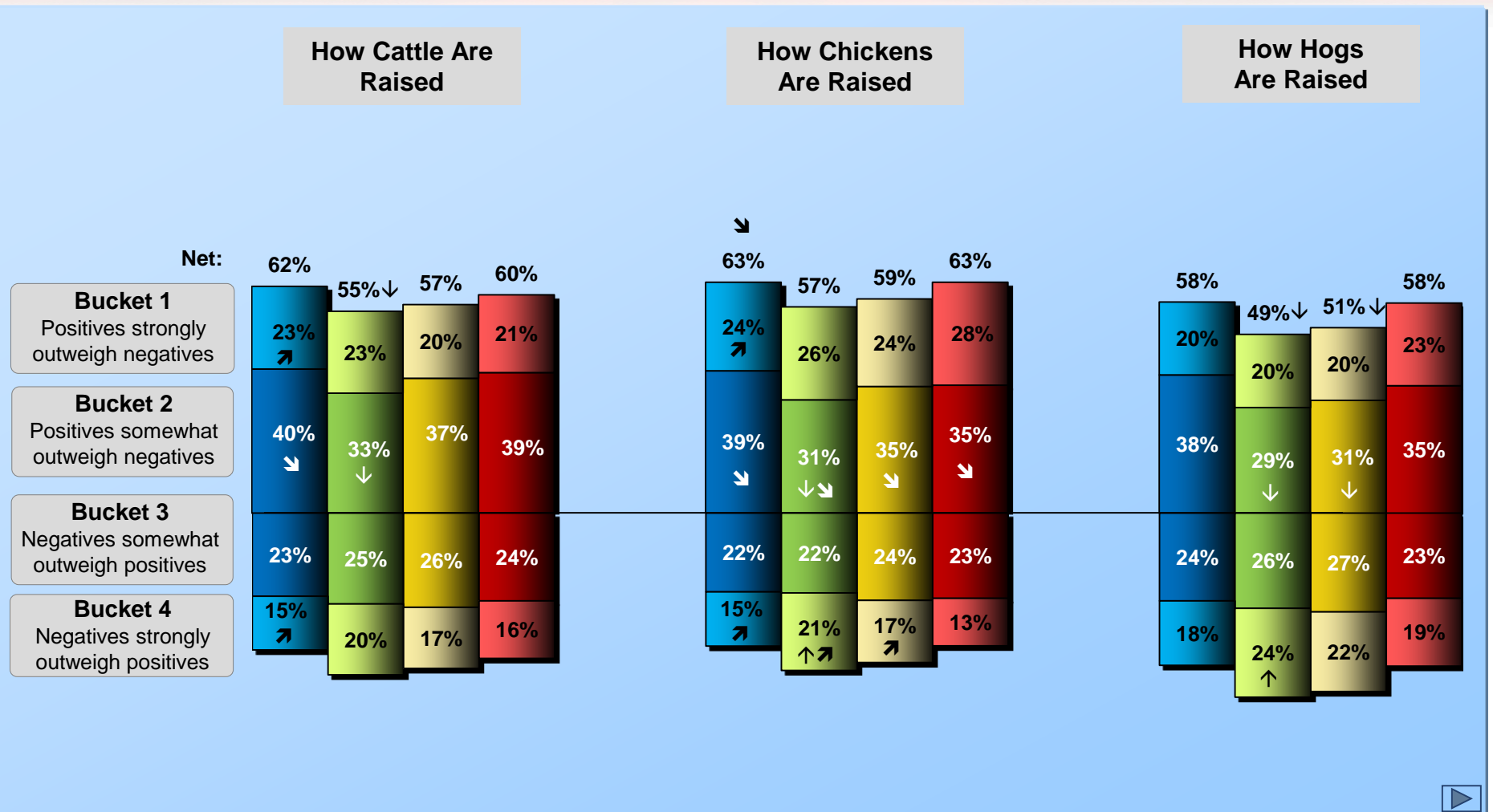


**Key:** Significant change in ongoing trend (↗↘) or higher/lower than non-segment (↑↓)

Socially Conscious			
Total	Proactive	18-35	Parents 20-35

Q.15: Please indicate how knowledgeable you are about each of the following...

# Perceptions of Production Practices



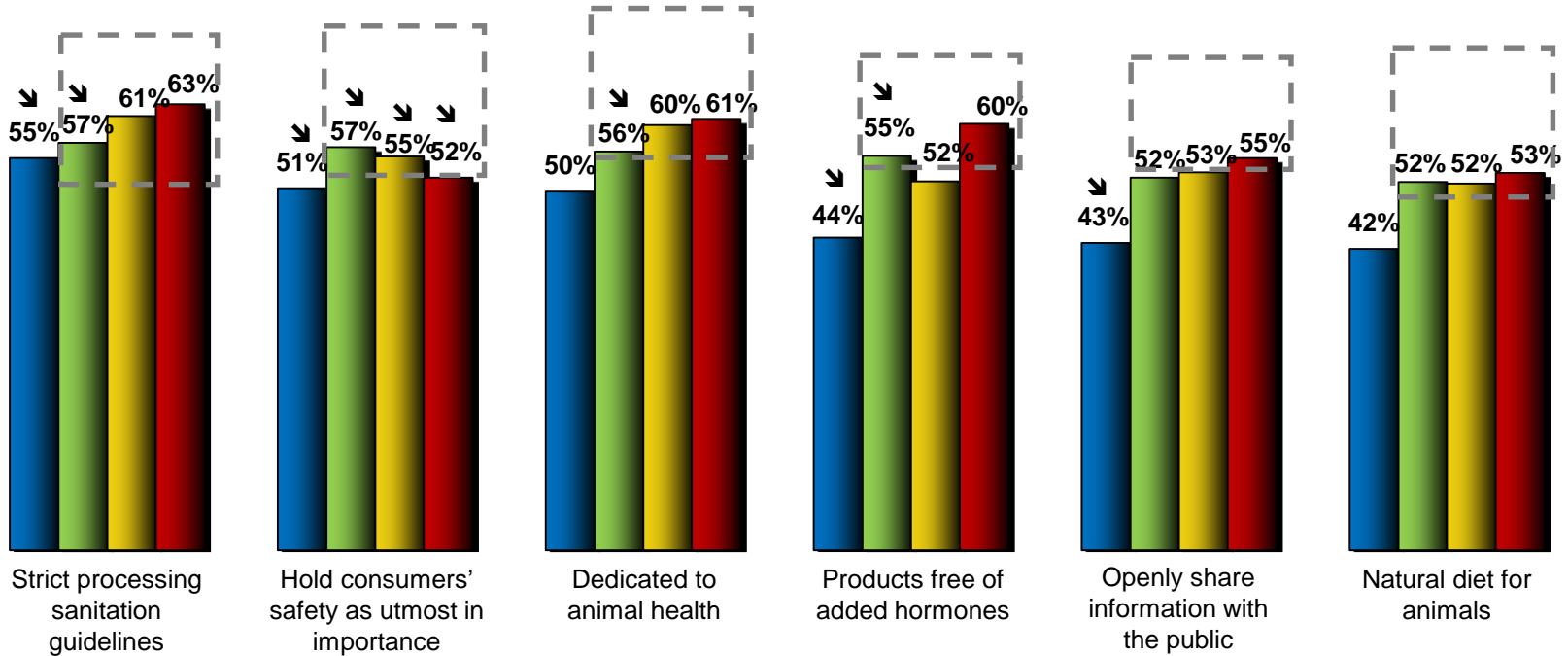
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Total	Socially Conscious		
	Proactive	18-35	Parents 20-35

Q.21/22/22a: Thinking specifically about how **cattle/chickens/hogs** are raised for food in the U.S., do you believe that...?

# Importance for Meat Industries

## Extremely Important



Part of segment definition

Key: Significant change in ongoing trend (↗↘)

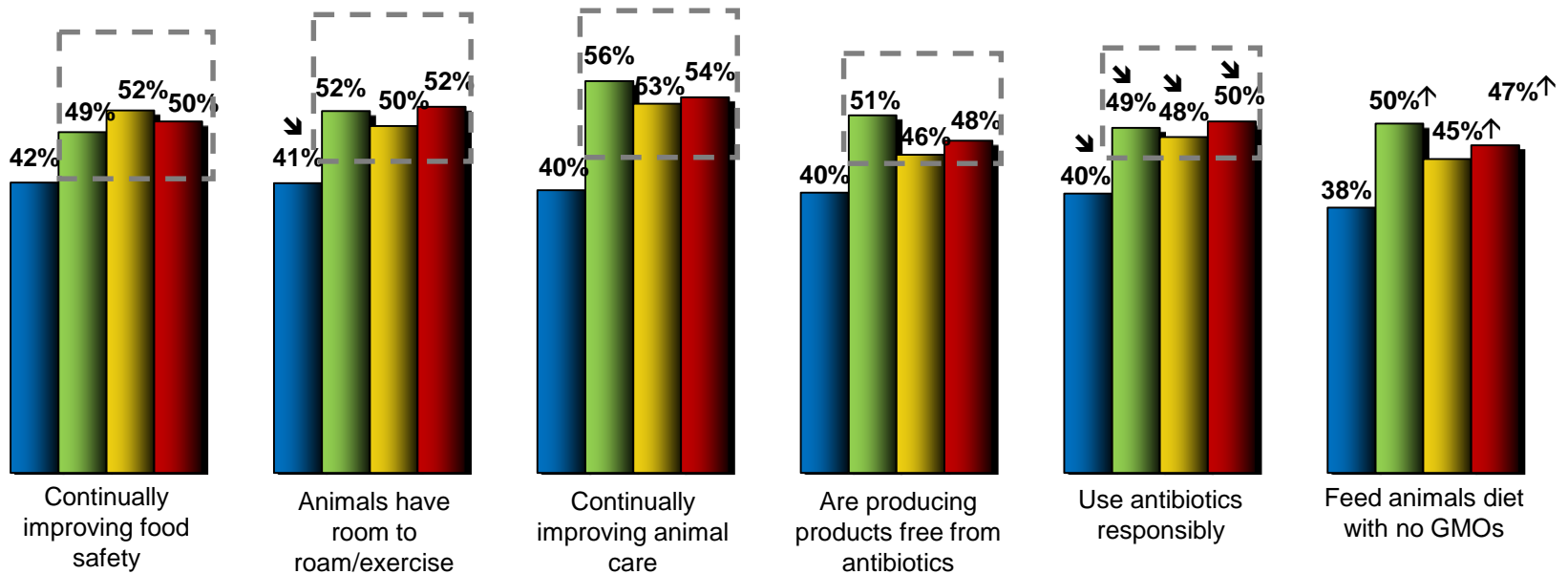


Q.16: How **important** is it to you that U.S. meat industries...?

# Importance for Meat Industries

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## Extremely Important



Part of segment definition

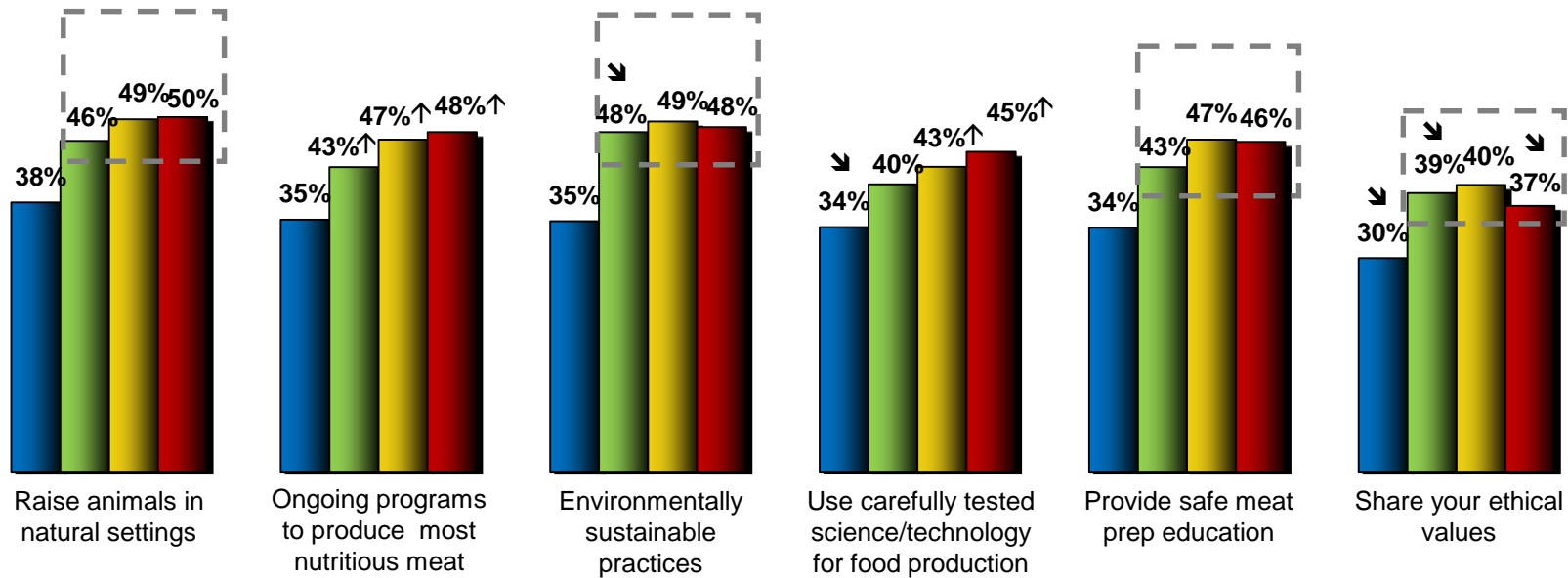
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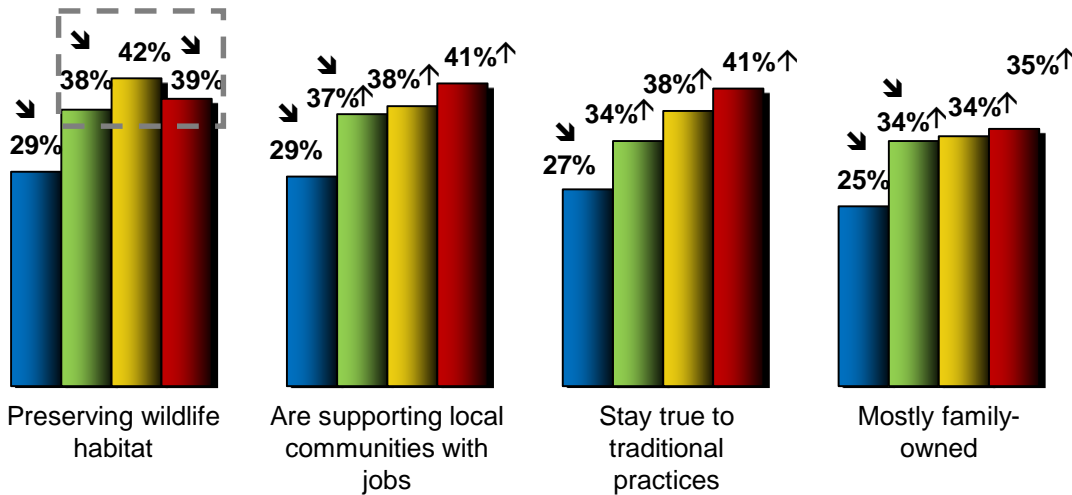


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# Importance for Meat Industries

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