

2016 NORTHEAST CONSUMER BEEF INDEX EXECUTIVE SUMMARY

“Your mission, in the NE, is just a little harder. Your region is tough.

Urban consumers bring many challenges to the table, and are ultimately very demanding.”

John Lundeen, Director of Market Research, National Cattlemen’s Beef Association, a contractor to the Beef Checkoff Program

Comparisons are between total U.S consumer data and data from the following Northeast metropolitan cities:
Boston, Hartford, New York City, Philadelphia, Baltimore and Washington, D.C

1. The Northeast metro areas show declining use of beef and other meat proteins.

- **Percentage of consumers who eat beef at least 3 times each week (considered ‘heavy users’):**
 - Total U.S. consumer, 33% or about 1/3 vs. 23% or about 1/4 Northeast consumers.
(both are trending down since 2001 Northeast Scorecard).
- **Of those that do eat beef weekly:**
 - Average frequency for total U.S consumers is 2.0 times each week.
 - Average frequency for Northeast metro consumers is 1.6 times each week.
(both are also trending down since 2011 Northeast Scorecard).
- **Same amount of vegetarians:**
 - 2% for total U.S and Northeast metro, but more flexitarians in the Northeast; 20% total U.S vs. 23% Northeast metro.

2. Northeast metro consumers have higher expectations. Metropolitan area residents are slightly younger, more educated and wealthier as compared to the rest of the U.S. Compared to national averages, they are more likely to be:

- Cooking and making changes to improve the healthiness of their diets and lives.
- Cutting back on meat use in general, but not eliminating or aspiring to eliminate any foods completely.
- Going out to fine dining restaurants (7% total U.S vs. 10% Northeast metro).
- Buying “specialty beef” products (including organic, hormone/antibiotic-free and natural).
- Shopping for beef at specialty grocers, butcher shops and club/warehouse stores versus chain grocery stores and Walmart.

3. Beef is not keeping pace with Northeast metro residents’ expectations.

Perception of Beef:

- Bucket 1 Consumers “Positives of beef strongly outweigh negatives”- 26% total U.S vs. 22% Northeast Metro.
- Bucket 2 Consumers “Positives of beef somewhat outweigh the negatives” 49% for both.
- Total Bucket 1 & 2 = 75% total U.S and 71% Northeast metro.

Preference for Beef:

- 38% Total U.S consumers prefer chicken and 30% prefer beef while 40% Northeast Metro consumers prefer chicken and 26% prefer beef. Preference for chicken is higher nationally and in Northeast metro markets. Overall, chicken preference is more pronounced in the Northeast metro markets.

4. Most key equity measures for beef lag among the Northeast metro areas. Relative to national averages, residents in the major Northeast metros continue to be significantly:

- Less likely to select beef as the first or a top choice for meals.
- Less likely to eat beef three or more times a week.
- Less likely to feel that the positives of beef strongly outweigh the negatives (Bucket 1s).
- Less willing to try new cuts of beef/recipes.
- More likely to restrict the amount of animal protein in their diets.
- Less likely to prefer beef over chicken.
- More likely to choose chicken over beef on a host of attributes, including calorie content, ease of preparation and versatility.

5. Continued positive nutrition messaging and a focus on product experience/quality are key in the Northeast.

- Even among this challenging audience, messaging related to beef’s protein, lean cuts and essential nutrients appears to be reaching, and favorably influencing, consumers.
- Lower confidence in beef products (taste, tenderness, and consistent results) may be indicative of higher standards, or lower success in choosing or preparing beef.
- Extending the national communications campaign appears to be a very good foundation, because opportunities exist among Northeast metro area residents to address/improve their relatively less fulfilling beef experience.

For the full Northeast Consumer Beef Index Report, contact the Northeast Beef Promotion Initiative staff at (814) 623-2698 or email cbrown@pabeef.org



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