University of Kentucky
Agricultural Economics Extension
Publication 2016-12, May 2016

Dr. Shang-Ho Yang
Dr. Timothy Woods

Consumer Meat Purchasing Survey: Observations of Millennial and Urban/Rural Residence Trends in Meat Purchasing in Kentucky, Tennessee, Ohio, Illinois, and Indiana

Consumer Meat Purchasing Survey

Observations of Millennial and Urban/Rural Residence Trends in Meat Purchasing in Kentucky, Tennessee, Ohio, Illinois, and Indiana

Dr. Shang-Ho Yang, Assistant Professor, Graduate Institute of Bio-Industry Management, National Chung Hsing University, bruce.yang@email.nchu.edu.tw

Dr. Timothy Woods, Extension Professor, Department of Agricultural Economics, University of Kentucky, tim.woods@uky.edu[1]

1. Overview

Meat purchasing behavior in the United States has changed remarkably over the last few decades. Shifts toward more poultry and away from red meats, but also the growth in labeling around issues of production locale, humane production standards, A-S-H free standards, religious certifications, organic, and other credence characteristics. Credence characteristics are defined by product marketers as those attributes for which a consumer may value, but the attribute may not be self-evident and thus requires some sort of certification. Consumer interest in these meat product certifications has been explored in a variety of settings, but we set out to examine the consumer trends in this region of the Ohio River Region of the U.S. with a particular emphasis on purchasing patterns and preferences expressed by Millennials[2] and between urban and rural resident consumers[3].

---

[1] Corresponding author.
This study was completed in collaboration with the U.K. Food Systems Innovation Center and was funded in part by a grant from the Kentucky Agricultural Development Fund. The authors gratefully acknowledge reviews from Dr. Lee Meyer and Dr. Gregg Rentfrow on earlier versions of this paper.

[2] We define Millennials as consumers born after 1980, following the definition used by the Pew Research Center: http://www.pewresearch.org/topics/millennials/. Some minor variations in starting birth dates have been

Millennials are a unique consumer group[4]. As younger consumers, their preferences are important to meat retailers inasmuch as they reflect likely overall changes in meat marketing and exert increasing influence on the market through their expressed preferences and growing purchasing power.

Research on the food purchasing behaviors for this group have intensified as this group matures and increases in spending power and influence. Studies like the Hartman Group (2014), Outlook on the Millennial Consumer 2014, emphasize the heightened focus of Millennials on social causes and food, the environment, and an active lifestyle. Their current economic condition in the lower earning stages of their careers, the study notes, limits current purchasing power and influence. But this may not be for long.

The urban-rural divide is another important distinction in purchasing preferences and behavior for meat retailing. Differences in access to specialty meat markets or even types of restaurants in urban settings may be part of what is reflected in consumer purchasing behavior. But there are also fundamental differences in food consumption patterns in terms of place, preferences for types of meat, and varied interest in selected credence attributes that various meat supply chains are seeking to develop. We suggest both urban and rural markets have distinct preferences for meat products that may require different marketing and distribution strategies. Both markets are important. In our sample, 62% of the participants identified with the urban market while 38% identified with rural.

2. Survey Approach

A web-based survey was completed by 3,802 consumers distributed across Kentucky, Tennessee, Ohio, Illinois, and Indiana in the Fall of 2012[5]. This region represents a significant population of potential meat consumers – 42.1 million individuals were reported to live in this five state area by the Census Bureau in 2015[6]. The distribution of actual population and respondents by state is summarized in Table 1. Response distribution by state, among those responding to state location, differed somewhat from the actual distribution. But the total sample size provides us a strong level of confidence for our focus on overall regional trends rather than by state, per se.

---

ascribed to this demographic segment. The U.S. Census Bureau, for example, uses 1982 in a recent report on Millennials vs Baby Boomers.

[3] Participants in this survey self-selected a category which “best describes where you currently live”. “City” and “Suburb” participants are classified here as “Urban”, while “Small town”, “Countryside (but not a farm)”, and “Farm” are classified as “Rural” for our purposes here.

[4] The Millennial shopper was the focus of the 2016 National Grocer Association educational programming. A summary was provided by Ron Margulis, “Millennials a key focus at National Grocers show”, Canadian Grocer, March 1, 2016, http://www.canadiangrocer.com/top-stories/millennial-market-a-key-focus-at-nga-show-62411

[5] Of this group, 2,710 indicated they consumed meat at least sometimes. This subset of meat consumers is the focus of analysis in this paper.

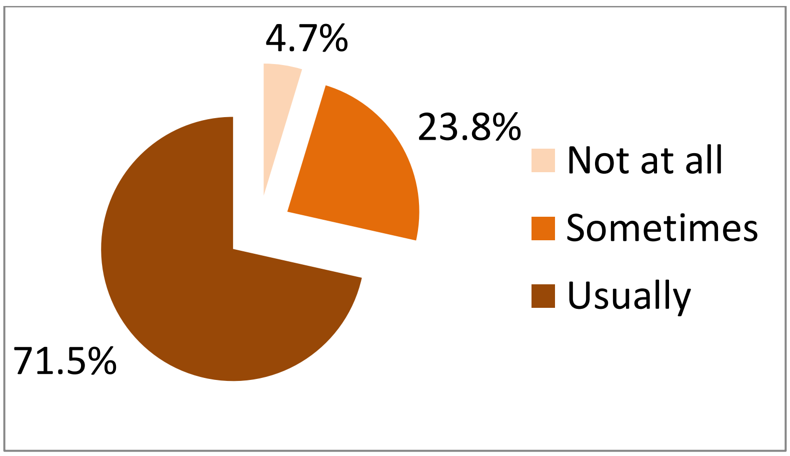
[6] State population data for 2015 as reported by the U.S. Census Bureau at http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk

Table 1. Actual and Sample Populations in the Five State Region

	Actual Population (millions)	Population as % of Region	Survey Sample	Sample % by Region
Kentucky	4.425	10.5%	435	16.1%
Tennessee	6.600	15.7%	470	17.3%
Ohio	11.613	27.6%	615	22.6%
Illinois	12.860	30.5%	595	21.9%
Indiana	6.620	15.7%	609	22.4%
Total	**42.118**		**2710**	

Respondents were required to be over 21. Of course not all consumers are regular consumers of meat. The distribution of those including meat in their diet is summarized in Figure 1, with just under 5% indicating meat was not at all included in their diet[7]. The balance of the analysis focuses on those consumers that at least "sometimes" include a variety of meat products in their diet.

Figure 1. In general, I include a variety of meat in my diet. (n=3,208)



[7] A 2008 Harris Interactive poll conducted for the Vegetarian Times reported 3.2% of the U.S. population as strict vegetarians and 10% indicating the "largely follow a vegetarian-inclined diet". http://www.vegetariantimes.com/article/vegetarianism-in-america/; sourced: May 20, 2016.

3. Millennials

Age distributions in the survey were heavily leaning toward older adults, with about 10% of the respondents indicating they were born 1980 or later. Millennials actually represented about 28% of adults over 20 in 2014 with 64.7 million Americans aged 20-34 (ACS, 2014). Our data appears to substantially underrepresent this population. Still, the 262 individuals provides a large enough sample size to characterize relative meat purchasing and preferences relative to the older population.

Table 2. Consumer Distribution by Age

Birth Year	Sample N	Sample Proportion
1980 and later	262	9.6%
1960-79	960	35.4%
1959 earlier	1488	55.0%
	2710	100.0%

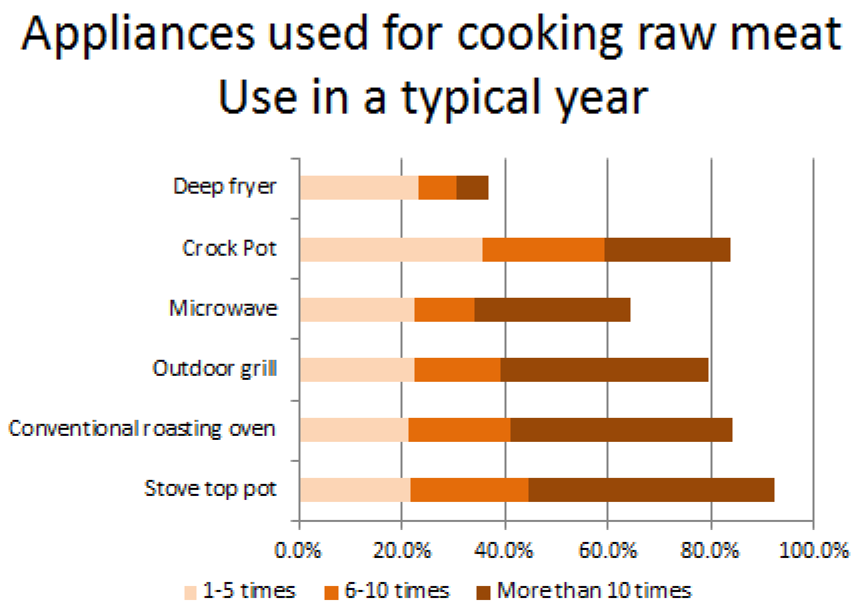
4. Some Initial Behaviors Impacting Meat Preferences

We looked at a variety of behaviors and resources, particularly at home, that might impact meat purchasing and consumption preferences. These included frequency of using various appliances for preparing meat, use of an upright freezer separate from a refrigerator, watching cooking shows, and entertaining guests in the home. Age and residence were explored throughout.

a. Appliances for cooking raw meat

Consumers use all sorts of approaches for preparing meat using favorite recipes and cooking techniques. We examined the frequency of use of some of the more commonly identified meat preparation techniques, summarized in Figure 2. It is evident that consumers use a diversity of approaches when cooking meat.

Figure 2. Use of appliances



Note: "none" category excluded

Interesting differences in meat preparation are evident for both age and residence – summarized in Table 3. Millennial consumers systematically indicated less frequent use of each cooking method, with the lone exception of the deep fryer. Rural residents appear more inclined to cook on the stove top, outdoor grill, crock pot, and deep fryer, while urban residents were relatively more likely to use the microwave.

These results suggest interesting implications already for targeted in-store sampling, recipe demonstration, and corresponding meat cuts for different uses best reaching these different consumers.

Table 3. Frequency of cooking raw meat by which appliances, uses per year

Types of appliances	Age			Region of Residence			Total Population
	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Stove top pot	8.14	8.76	**	8.59	8.88	**	8.70
Conventional roasting oven	6.86	7.96	***	7.82	7.91	-	7.86
Outdoor grill	6.42	7.39	***	7.05	7.69	***	7.30
Crock Pot	5.37	6.25	***	5.79	6.76	***	6.16
Microwave	4.67	5.69	***	5.79	5.26	***	5.59
Deep fryer	2.52	2.07	**	1.84	2.56	***	2.12

Note: Mean uses per year based on midpoint estimates for each category and an imputed value of 13 for 10+ for the purposes of comparing segments.
Note: t-tests throughout this report indicate statistically significant differences in the mean responses between two groups being compared at the 90% (*), 95% (**) and the 99% (***) confidence intervals.

b. Owning a free-standing freezer

Age and residence showed considerable differences in the ownership of a free-standing freezer, separate from a freezer that may be attached to a refrigerator. Consumers typically use a freezer to take advantage of bulk purchases and more frequent home food preparation. Overall, over half the consumers surveyed indicated they owned a freezer. Millennial consumers, however, were much less likely to own a separate freezer. This could potentially relate to home ownership and general mobility of younger consumers. A little bit surprising was the much higher incidence of freezer ownership among urban residents – especially given the higher frequency of meat preparation and consumption noted throughout the study by rural consumers. These results are summarized in Table 4.

Table 4. I own a free-standing freezer (upright or chest)

	Age			Region of Residence			Total Population
	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
own a freezer	45%	56%	***	66%	48%	***	55%

Notes: Values in this table are mean values according to each demographic category

c. **Cooking shows**

Cooking shows have become extremely popular across cable networks. Over 1/3 of the participants surveyed indicated they watched a cooking show at least once per week (see table 5). These programs have contributed to increased interest in home food preparation and have been an effective platform for reintroducing cooking and recipes to a busy food consumer population. Millennials appear to be somewhat less inclined to frequently watch cooking compared to older consumers. No differences were observed by type of residence.

Table 5. Frequency of watching cooking shows

	Age			Region of Residence			Total Population
Frequency	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Weekly and More than once a week	30.5%	35.9%	**	35.9%	34.6%	-	35.4%

Notes: Values in this table are mean values according to each demographic category. Two other options of "none/rarely" and "about once per month" were provided.

d. Entertaining at home

Entertaining guests at home can be an event that potentially increases at home meat consumption. Rather surprisingly, over half (54%) of the individuals surveyed indicated they "rarely" entertained additional family or guests at home, and only 13% indicated they did so more than once per month (see table 6). There was a slightly higher tendency for Millennials and for urban residents to entertain, but it wasn't a common event.

It need not be inferred that people don't get together to prepare meat and other food products for consumption at parks, sporting events, or other off-site settings. Consumers also engage socially over food at restaurants. But home social entertainment is clearly less common, perhaps reflective of the on-the-go food culture of many Americans.

Table 6. **Frequency of Entertaining additional family or guests in my home**

	Age			Region of Residence			Total Population
Frequency	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Rarely[1]	51.5%	54.2%		52.6%	56.2%		54%
About once per month[1]	32.2%	33.1%		34.4%	30.8%		33%
More frequently than once per month[1]	16.5%	12.7%		13.1%	13.1%		13%
Average frequency (events per month)[2]	0.65	0.58	*	0.60	0.56	*	0.59

Notes: [1] Values are percent of response by category.

[2] Values are estimated mean frequencies for each demographic. Numeric estimates assigned to each frequency category are: Rarely = 0, About once per month = 1, and More frequently than once per month = 2.

5. Meat Consumption at Home and at Restaurants

Consumers were asked to indicate the frequency of consumption at home and again in a restaurant for a selection of common meat products and some specialty products. Comparisons between Millennial and older adults and again between urban and rural consumers are summarized for both settings in the following tables.

Meat consumption at home between Millennials and older adults differs little (see table 7). Where interesting differences occur are in the reported purchase frequencies for specialty meat products like tilapia, catfish, lamb, wild game, and bison – younger consumers systematically consuming more of these products compared to older adults.

Meat consumption at home in the urban versus rural setting suggests consumption differences exist in the more common meat products, where rural consumers are eating more chicken breasts, pork chops, and sausage at home than their urban counterparts. Urban consumers are generally eating more of the specialty meats at home.

Table 7. Meat Consumption at Home, Frequency of purchase for home consumption during the past 12 months.

	Age			Region of Residence			Total Population
Types of meat	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Chicken Breasts	11.72	11.26	-	11.18	11.50	**	11.30
Pork Chops	7.31	7.43	-	6.98	8.12	***	7.41
Beef Steaks	6.97	7.34	-	7.34	7.23	-	7.30
Sausage	7.12	7.26	-	7.07	7.54	**	7.25
Pork Roast	4.47	4.62	-	4.55	4.70	-	4.61
Tilapia	3.58	2.97	**	3.34	2.52	***	3.03
Catfish	2.13	1.56	**	1.68	1.49	**	1.61
Lamb	1.43	0.82	***	1.09	0.54	***	0.88
Venison/wild game	1.47	0.47	***	0.58	0.54	-	0.57
Bison	1.22	0.39	***	0.56	0.32	***	0.47

Note: Mean frequency values were estimated from the midpoint of categorical response options of "haven't purchased", "1-4 times", "5-9 times", "10-14 times", and "15 times or more". A value of 0 was assigned to the first group and 18 was assigned to the last category for the purposes estimating differences in mean response by demographic group.

Restaurant meat consumption frequency was relatively lower for the meat products examined in this survey. The results, however, showed higher frequency on meat consumption for Millennials for every meat product except beef steaks and catfish (see table 8). Similarly, urban residents indicated higher frequency of consumption for every product in restaurants except sausage and catfish.

These are representative meats and cuts of meat, not intended to represent an exhaustive list. But what is evident, is that there is a clear difference in both home and restaurant consumption frequency for Millennials and for different residents. Most grocers readily adapt their meat cuts and inventories by location. Urban markets are also able to more readily service demand for specialty meat products to a minimum critical mass of buyers for products like tilapia, lamb, bison, and wild game. The preference differences reflected by younger consumers, however, suggests most meat products may be able to readily build future demand based on the generally higher home and away meat consumption observed.

Table 8. **Meat Consumption at Restaurants, Frequency of purchase for restaurant consumption during the past 12 months.**

	Age			Region of Residence			Total Population
Types of meat	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Chicken Breasts	7.05	5.46	***	5.87	5.19	***	5.61
Beef Steaks	4.82	4.52	-	4.72	4.27	***	4.55
Sausage	3.02	2.63	*	2.67	2.67	-	2.67
Pork Chops	2.25	1.74	**	1.92	1.58	***	1.79
Tilapia	2.01	1.58	**	1.87	1.22	***	1.62
Catfish	1.64	1.49	-	1.51	1.50	-	1.51
Pork Roast	1.78	1.14	**	1.35	0.96	***	1.20
Lamb	1.40	0.61	***	0.89	0.34	***	0.68
Bison	3.02	0.31	***	0.49	0.12	***	0.37
Venison/wild game	0.98	0.21	***	0.39	0.12	***	0.29

Note: Mean frequency values were estimated from the midpoint of categorical response options of "haven't purchased", "1-4 times", "5-9 times", "10-14 times", and "15 times or more". A value of 0 was assigned to the first group and 18 was assigned to the last category for the purposes estimating differences in mean response by demographic group.

6. Credence labels and meat

Consumers have increasingly expressed interest in characteristics about their food in terms of who produced it, how was it produced, and where was it produced. Numerous labeling programs have emerged that have attempted to differentiate production for consumers. We examined the popularity of some of these labels among Millennials and by residence.

Overall, purchasing frequency identified with these labels was observed to be relatively low, as noted in table 9. Locally grown was identified most frequently among these attributes, even more than certified organic. The consumer segments that value these attributes are clearly growing in importance. This is suggested, for example, by higher purchase frequencies amongst Millennials.

Urban residents generally indicate higher purchase frequencies of products with these credence characteristics, as well. This may relate again to the opportunities urban food retailers have to reach a minimum critical mass of consumers expressing preference for these types of labels. The one interesting difference is for locally grown labels where rural residents are actually higher.

Table 9. Meat Credence Labels, Frequency of Trial during past 12 Months

	Age			Region of Residence			Total Population
Types of Label	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Locally grown	2.41	2.17	*	2.15	2.26	*	2.19e
Grass fed	1.87	1.79	-	1.83	1.72	-	1.79d
USDA Organic	2.21	1.57	***	1.70	1.53	**	1.64cd
Free Range	1.88	1.49	**	1.57	1.46	*	1.53c
Certified Naturally Raised	1.76	1.45	**	1.61	1.26	***	1.48c
Antibiotic-Steroid-Hormone free	1.99	1.41	***	1.53	1.35	**	1.47c
Kosher	1.18	0.88	**	1.03	0.68	***	0.91b
Humane treatment certified	1.27	0.72	***	0.86	0.64	***	0.77b
Halal	0.59	0.15	***	0.25	0.06	***	0.18a

Notes: [1] Numbers on this table are mean value respecting to each category.
Categories are: Not tried is 0; tired once is 1; tried 2-3 times is 2.5; tried more than 3 times is 5.
Asterisks indicate levels of significance: *=0.1, ** = 0.05, and *** = 0.01.
Overall average ranked mean within a column, followed by the same letter are not significantly different (Tukey's test HSD P < 0.05).

7. Shopping for Meat

Meat shoppers demonstrate very different perspectives in their perceptions of where to source quality and what sorts of services they prefer. While the vast majority of consumers look to the traditional grocer for their meat, other meat marketing formats are also popular. We specifically examine consumer interest in a local butcher shop as a retail concept. Many of these types of specialty shops were lost with the major expansion of the grocery format, but the format may be seeing a revival of interest with more emphasis on quality and service.

Consumers were asked to provide their perception of where they felt they would be able to source the highest quality of raw meat (see table 10). They were presented with nine store formats and asked to select four of them where they expected the highest quality. The butcher shop was by far the most frequently identified format. Chain grocers were identified next, followed by farmers markets and natural food stores.

Millennials had a decidedly different perception of where to source quality raw meat. They ranked the butcher shop highest, but not as high as older adults. Farmers markets and natural food stores were ranked second and third among this group. Most notably, traditional grocery store formats were identified much less frequently among Millennials, suggesting a higher willingness for this group to venture beyond the traditional grocery format to source meat.

Residence differences were also evident for this question – both urban and rural residents most frequently identifying the local butcher shop. But urban residents were more likely to identify the large chain grocer while rural residents the small chain or independent. Natural food stores, on-line meat retailers, and club stores were each more frequently identified with quality raw meat by urban residents.

Table 10. Sources of Highest Quality Raw Meat

	Age			**Region of Residence**			**Total Population**
Highest quality of raw meats come from …	Millennial	Older	t-test	Urban	Rural	t-test	Overall Frequency
Local butcher shop	63%	73%	***	71%	74%	***	72%g
Large chain grocer	31%	46%	***	46%	41%	***	44%f
Small chain or independent grocer	30%	40%	***	36%	45%	***	39%e
Farmers market	44%	31%	***	33%	32%	-	32%d
Natural foods store	38%	29%	***	34%	24%	***	30%cd
Supercenter	27%	28%	-	26%	31%	***	28%c
On-line meat retailer	10%	17%	***	18%	13%	***	16%b
Club store	11%	16%	**	18%	12%	***	16%b
Home meat/food delivery service	10%	12%	-	11%	13%	**	12%a

Note: Respondents were asked to select four of the market categories provided rather than ranking, per se. The question specifically was "Where do you think you will be able to source the highest quality of raw meats (please select four)". Frequency of each market selected is reported here.

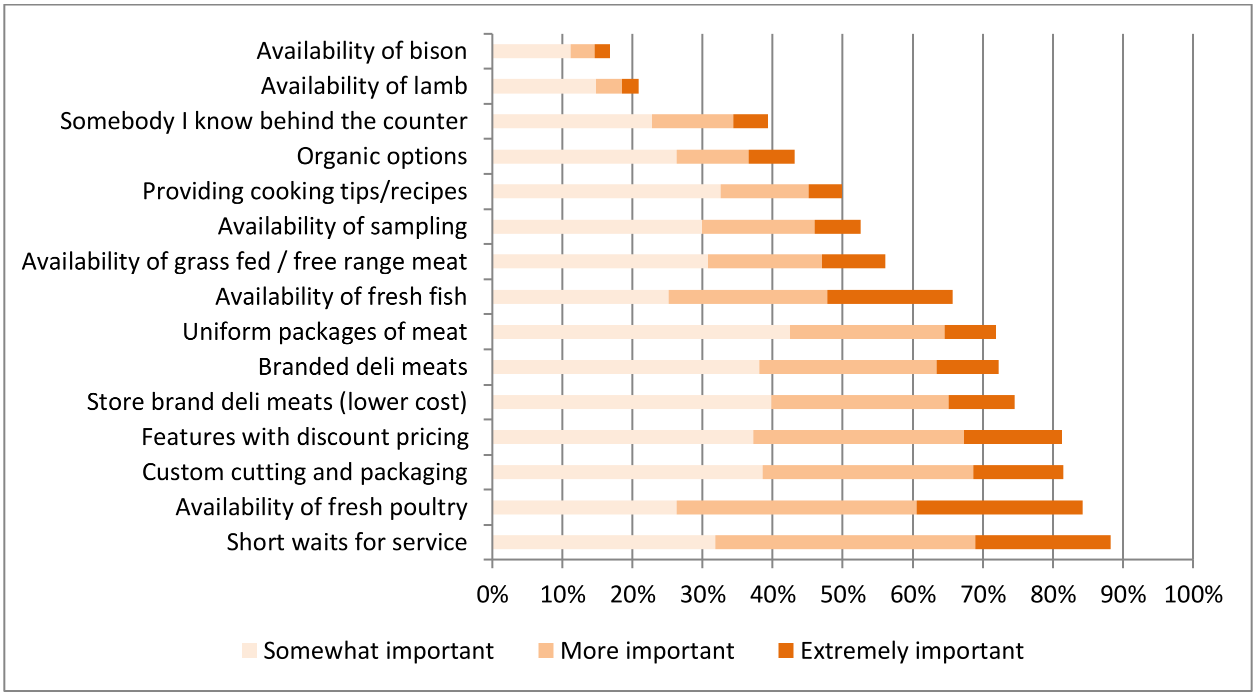
Overall average ranked mean within a column, followed by the same letter are not significantly different (Tukey's test HSD P < 0.05).

a. Meat at the grocery store

Meat purchases in the grocery store are commonplace across all consumers. The products and services that consumers are looking for when shopping at a grocery store, however, vary. This can be an important consideration for meat retailers seeking to favorably differentiate themselves on service to one group or another.

Consumers rated a list of 15 products and services in a typical grocery meat counter setting, each from "not important" to "extremely important". The meat department is a highly complex combination of products and services, even for a small grocer. Still, the overall rating of these products and services isn't terribly surprising. Short waits for service, availability of fresh poultry, custom cutting and packaging, and features with discount pricing were most identified and are the trademarks of most meat departments. The overall rating of products and services is summarized in Figure 3.

Figure 3. Overall importance of grocery meat department products and services



Differences in preference for grocery meat counter products and services did not vary much in importance between Millennials and older consumers among the top categories (see table 11). Millennials, however, did tend to place a higher level of importance on a wider range of products and services. These included having lower cost store brands, branded deli meats, uniform packages of meats, availability of specialty meats (lamb, bison, organic, grass fed), and also valued more sampling and recipes compared to older adults. A diversity of services and products seem to be more important to the Millennial group.

Urban residents placed slightly more importance on most of the products and services compared to their rural counterparts. This can come from higher competition between meat retailers in urban areas and the development of higher expectations from shoppers with a wider choice set. Fresh product availability and branded meats were more commonly identified as higher priority products by urban consumers. The order of importance of these products and services, however, was not substantially different.

Table 11. Consumers' rating on the importance of grocery meat department's services

The types of services on Grocery meat department	Age			Region of Residence			Total Population
	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Availability of fresh poultry	59%	58%	-	60%	56%	***	58%g
Short waits for service	54%	57%	-	57%	55%	-	56%g
Features with discount pricing	47%	44%	-	45%	42%	*	44%f
Custom cutting and packaging	42%	43%	-	44%	41%	*	43%f
Availability of fresh fish	38%	41%	-	44%	35%	***	41%f
Store brand deli meats (lower cost)	40%	34%	**	36%	33%	*	35%e
Branded deli meats	40%	34%	**	38%	29%	***	34%e
Uniform packages of meat	38%	28%	***	30%	28%	-	29%d
Availability of grass fed / free range meat	33%	24%	***	26%	24%	-	25%cd
Availability of sampling	33%	21%	***	25%	19%	***	23%c
Organic options	29%	16%	***	18%	14%	***	17%b
Providing cooking tips/recipes	23%	16%	***	19%	14%	***	17%b
Somebody I know behind the counter	20%	16%	*	17%	15%	*	16%b
Availability of lamb	12%	5%	***	7%	3%	***	6%a
Availability of bison	15%	4%	***	6%	3%	***	5%a

Note: Overall average ranked mean within a column, followed by the same letter are not significantly different (Tukey's test HSD P < 0.05).

b. Buying meat at a butcher

The final category of questions related to experience with butchers and interest in the butcher as a retail meat concept. Butchers were noted earlier as the format by far most frequently identified with high quality raw meat. These questions related to just how frequently consumers actually shopped at a butcher, potential concerns about actually shopping at a butcher, and products and services consumers would most like to see provided when visiting.

Independent butcher shops are not frequently patronized; the average visits per 12 months as about 2. Only about 6% indicated visiting a butcher shop regularly – about once per month or more, while over half had not visited a shop at all (see Figure 4).

Figure 4 Butcher shop visits during last 12 months

N=2,840

Slight differences were observed between Millennial and older adult shoppers, with Millennials indicating slightly more frequent visits (see table 12). No differences were observed by place of residence.

Table 12. **Frequency of shopped at a butcher shop outside of the grocery store**

Frequency in last 12 months	Age			Region of Residence			Total Population
	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Shopped at an outside butcher shop	2.52	2.16	***	2.19	2.21	-	2.20

Notes: Mean visits per 12 months are imputed from categorical choice options: None is 0; once is 1; twice is 2; three times is 3; 4 to 10 times is 7; about once per month is 12; more than once per month is 18.

Consumers who had NOT visited a butcher shop during the past 12 months were asked to indicate why. The absence of a butcher shop was the most frequently cited reason, followed by higher expected prices and lack of convenience adding another shopping site.

Millennials seemed slightly more likely to at least have access to a butcher shop (see table 13). The only other difference of note was Millennials more likely to indicate uncertainty about how to use secondary meat products. But this response was minor.

The urban-rural residency suggested stronger differences. Rural shoppers were more inclined to indicate absence of a butcher – a common difficulty of specialty shops locating in rural areas. Urban shoppers were more inclined to express concerns over higher expected prices (as well as not thinking the butcher products would be worth the extra price), inconvenience of adding a shopping stop, and satisfaction with service at their grocery butcher.

Table 13. **Reasons not shop at a butcher shop outside the grocery store**

	Age			**Region of Residence**			**Total Population**
Reasons	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
No local butcher shops available	29%	35%	**	30%	40%	***	34.5%
Expect prices to too high	15%	17%	-	19%	12%	***	16.9%
Inconvenience of one more shopping stop	15%	15%	-	18%	11%	***	15.2%
Already great service from my grocer's meat counter	9%	12%	-	13%	10%	***	12.2%
Don't own a freezer	6%	8%	*	8%	7%	*	8.1%
Not worth the price	6%	7%	-	8%	5%	***	6.9%
Expect volume purchases required	1%	3%	-	2%	3%	-	2.8%
Uncertain of how to use secondary meat products	4%	1%	***	1%	2%	-	1.6%
Food safety concerns	2%	2%	-	1%	1%	-	1.5%
Uncertain ingredients	1%	1%	-	1%	1%	-	1.3%
Concern about products being healthy or nutritious	1%	1%	-	1%	1%	-	0.9%
Ingredients not grown or prepared to standards	1%	1%	-	1%	1%	-	0.7%
Others in my household would not like it	1%	0%	-	0%	0%	-	0.4%

Notes: [1] Numbers on this table are mean value respecting to each category.
Asterisks indicate levels of significance: *=0.1, ** = 0.05, and *** = 0.01.

Products and services that would actually attract someone to shop at a butcher were explored, requesting consumers to rank a selection of representative products and services. The categories represented in the survey are not an exhaustive list. Most successful butchers have a wide array of products and services that are bundled together to attract patrons. Representative elements are presented here to help order at least their relative importance in the bigger picture. These are summarized in table 14 and 15.

Publican Quality Meats, Chicago, IL

Quality expectations were clearly expressed again as premium quality meats was ranked the highest. Availability of local meats and other locally produced products were also ranked second and third. The linkage to local sources of meat and food products would seem to be an important part of the value proposition.

Table 14. Products that would attract to shop at a butcher

Types of products	**Age**			**Region of Residence**			**Total Population**
Average ranking highest to lowest, 1-6	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Premium quality meats	2.21	1.90	***	1.91	1.96	-	1.93e
Availability of local meats	2.99	3.09	***	3.22	2.85	***	3.08d
Availability of other locally produced products	3.96	3.81	***	3.87	3.75	***	3.82c
Fresh prepared foods	3.56	4.01	***	3.93	4.04	***	3.97b
Availability of unique deli and sausage products	4.06	3.96	***	3.86	4.16	***	3.98b
Availability of cheeses	4.20	4.20	-	4.19	4.21	-	4.20a

Notes: Values in this table are mean rank corresponding to each product.
Respondents ranked these six items with 1 = most attracting to shop at the butcher shop
Overall average ranked mean within a column, followed by the same letter are not significantly different (Tukey's test HSD P < 0.05).

Services at a butcher were also examined, noting that meat selection was first followed by butcher knowledge of cuts and preparation, then volume discounts for cost savings. Custom cutting, sampling and demonstration, and attached deli/café followed these.

While rank order remained the same for Millennials and older adults, Millennials placed a higher preference on butcher knowledge, bulk cost savings, regular sampling/demonstrations, and attached café and less on the overall meat selection. This would be consistent with Millennial interest in a more experiential retail experience.

Urban consumers also leaned slightly more toward the experiential elements. Relatively higher ratings went to sampling and cooking demonstrations and an attached deli, while rural shoppers rated lower cost and custom cutting higher.

Table 15. Services that would attract to shop at a butcher

	Age			Region			Total Population
Types of services	Millennial	Older	t-test	Urban	Rural	t-test	Overall Average
Meat selection	2.35	2.02	***	2.03	2.09	*	2.05f
Butcher knowledge of meat cuts and preparation	2.97	2.74	**	2.75	2.78	-	2.76e
Lower cost per pound for large orders	2.92	3.14	**	3.23	2.95	***	3.12d
Custom cutting	3.67	3.30	***	3.37	3.27	**	3.34c
Regular sampling and cooking demonstrations	4.16	4.63	***	4.54	4.65	***	4.58b
Attached affiliated café/deli	4.90	5.15	***	5.06	5.24	***	5.13a

Notes: Values in this table are mean rank corresponding to each service.
Respondents ranked these six items with 1 = most attracting to shop at the butcher shop
Overall average ranked mean within a column, followed by the same letter are not significantly different (Tukey's test HSD P < 0.05).

8. Conclusions

This regional meat consumer study identifies a number of important differences related to Millennials and older adults and also between consumers by residence. These can have important implications for meat retailing strategies, including by type of meat, merchandising to use, and adapting store meat services to targeted clients.

Millennials are more inclined to try less common types of meat and place a higher premium on credence labels across the board. This suggests promising opportunities for producers and retailers to develop product and service points of differentiation.

Urban consumers are different from rural consumers in a number of ways. Differences in how meat is prepared and ownership of a freezer suggest variations in approach to how meat actually gets purchased and prepared. Not surprisingly, meat consumption in restaurants is more common among urban consumers. And with the exception of locally grown labels, credence branding is more frequently identified as used by the urban consumers. This can be a product of more retail meat competition, but also the greater opportunities for specialty meats reaching a critical mass of consumers in an urban setting.

Butcher shop engagement is relatively uncommon in the region both by age and by residence. Limited availability or choice seems to be the driving force. Millennials noted a slightly higher inclination to shop at a butcher, an interesting turn toward the higher service and product preferences expressed by this group. Expectations of higher meat quality, product assortment, and product knowledge lead the characteristics of what would draw consumers to a butcher shop.

It seems evident that different meat merchandising strategies are going to be effective targeting different age groups and geographic populations. Many retailers have figured this out already. This data suggests decent opportunities for targeted branding and service that could more effectively reach certain segments. And as the U.S. population continues to shift in weight of consumer influence (in the case of the emerging Millennial group) and location (faster growing urban areas), opportunities for more diverse meat marketing strategies seem likely to emerge, as well.

9. References

ACS Demographic and Housing Estimates, 2010-2014, American Community Survey 5-Year Estimates; accessed February 26, 2016 at
http://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk

Hartman Group, Outlook on the Millennial Consumer 2014; accessed February 26, 2016 at
http://store.hartman-group.com/content/millennials-2014-overview.pdf