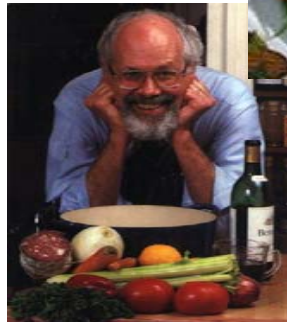


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# Ohio Pork Consumer Survey

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The Ohio State University



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# Background

- Ohio Family Farm Beef Industry Network
    - Congressional Funding directed toward Beef, Pork and Meat Goat Markets within Ohio
    - Research funds directed through Ohio State University to conduct research investigating targeted markets for Ohio-based products
    - Pork Consumer Attitude Study
      - Conducted in conjunction with the Business Research Group at the University of Dayton (October 2006)
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# Consumer Attitude Survey Objectives

- Identify Factors that Influence Pork Purchases and Consumption
    - Breakfast, Lunch and Dinner
    - At Home and Restaurant
  - Identify Product Characteristics that are “Valued” or perceived as “Quality Indicators” by Consumers
  - Assess Attitude Toward and Potential Value of a Ohio-based Pork Product Offering
-

# Ohio Pork Survey Outline

## ■ Phone Contact Survey

- Only Pork “Eaters” (1x or greater per week @ breakfast or @ lunch or dinner)
- 402 of 787 interviewed met the criteria and completed the survey

Interview Response to: Frequency of Pork Consumption Within the Household (n=787)		
Frequency	Breakfast	Lunch or Dinner
<1X per month	30.6 %	20.6 %
>1x per month	34.7	39.8
1x per week	18.2	26.3
> 1x per week	16.5	13.3

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Pork Product Consumption Frequency: Percent Consuming Product  $\geq$  1x per week (n=402)

Product	Frequency (n=402)
Bacon	51.5 %
Chops	31.4
Ham	31.4
Sausage-Pattie	29.4
Sausage-Link	27.2
Ground Pork	12.5
Bratwurst	11.9
Stew/Soup/Stir Fry	10.5
Roast	10.2

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# Where do Ohio Consumers Eat Pork

## ■ Breakfast

- **59% of Consumers** indicated that **< 20%** of their Breakfast pork consumption was in a Restaurant
  - Pork for Breakfast is predominantly at Home

## ■ Lunch or Dinner

- **68% of Consumers** indicated that **< 20%** of their Lunch or Dinner pork consumption was in a Restaurant
    - Pork for Lunch and Dinner is predominantly at Home
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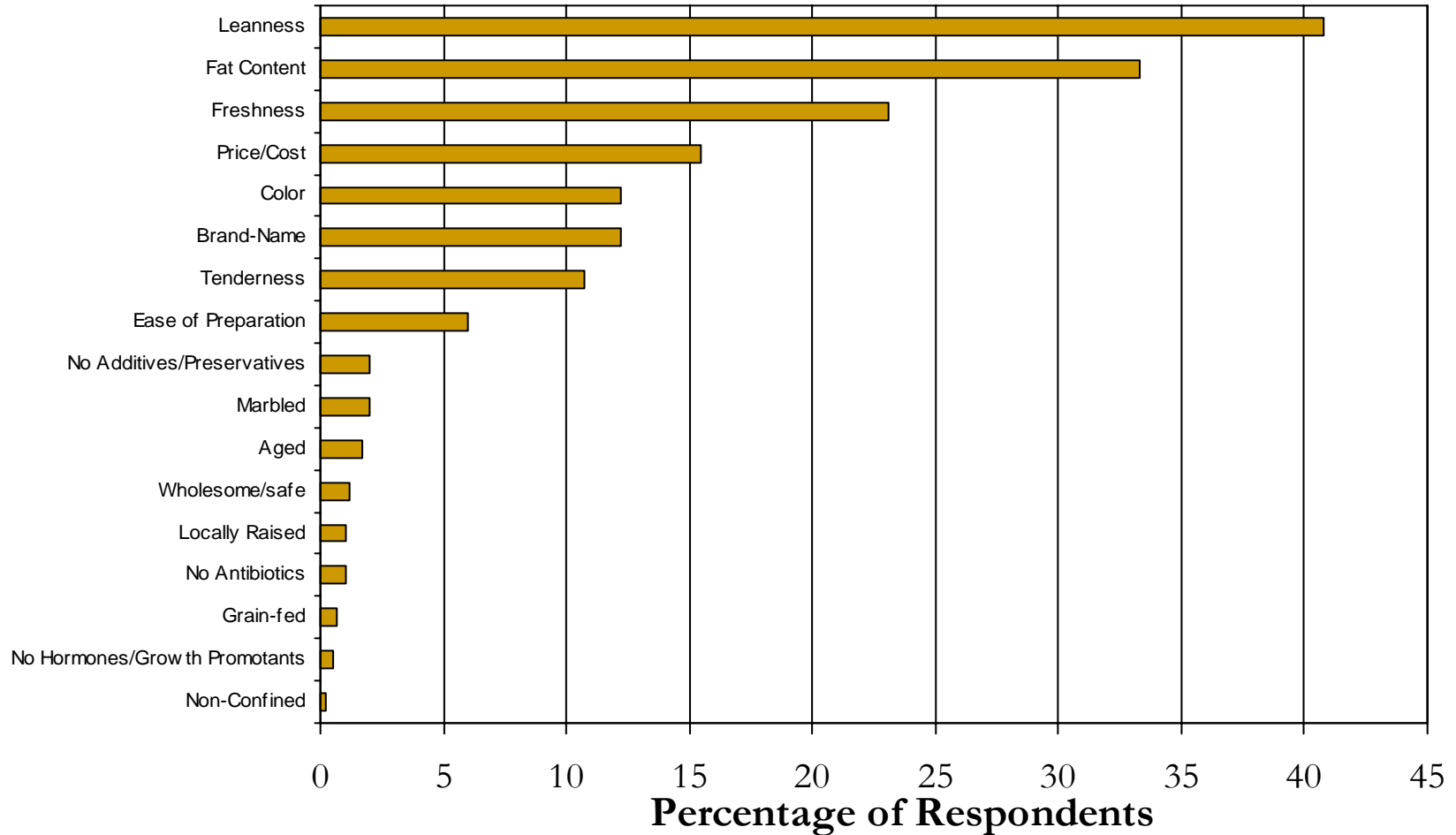
# Primary Retail Outlet for At-Home Consumption

Primary Location	Percentage
Grocery Store	85.6 %
Retail Meat Market/Local Butcher Shop	10.2
Farmer's Market	1.2
E-Commerce (web)	0.7
Other	2.2

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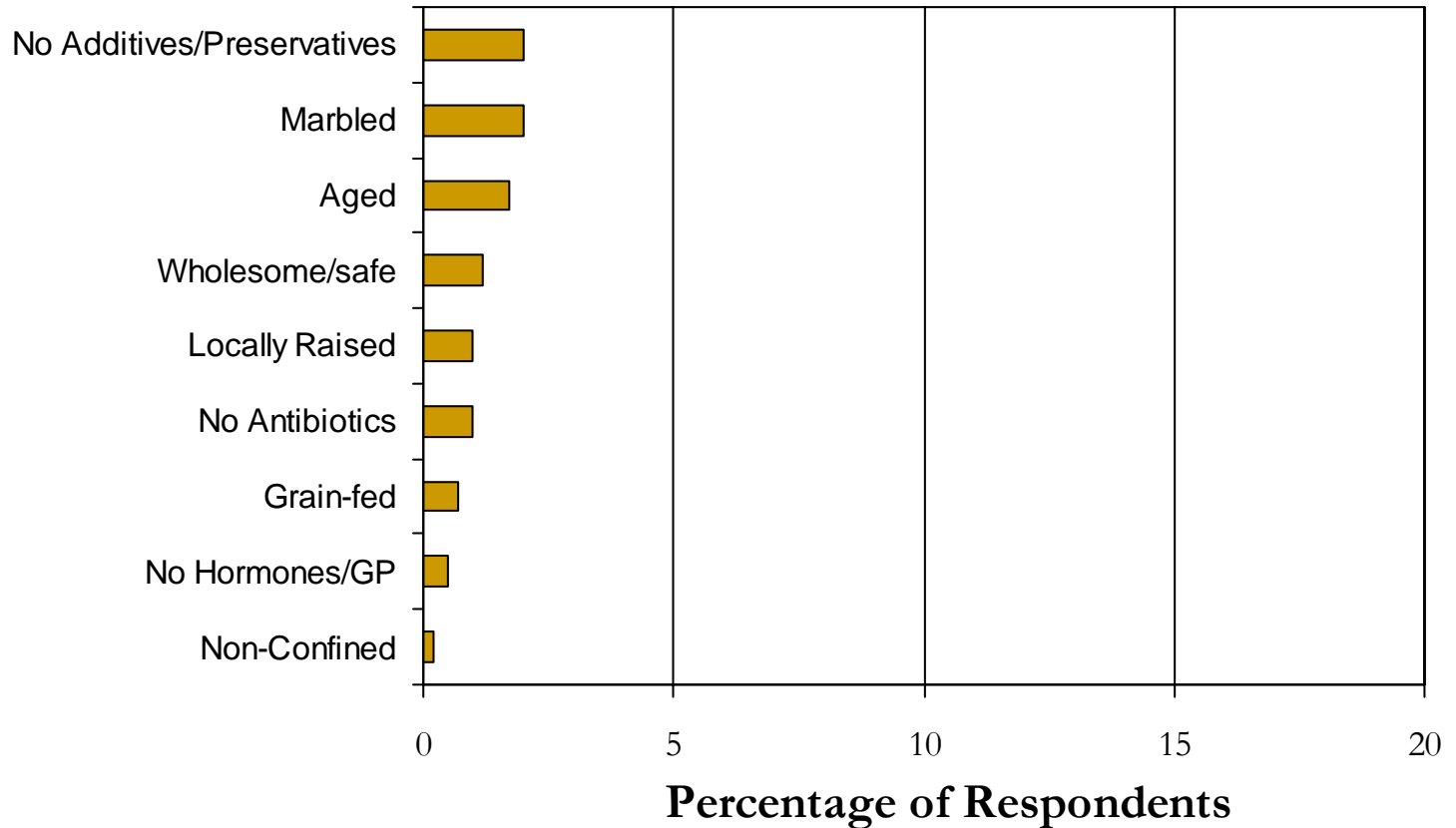
# Quality Desired in Pork Breakfast

Products: Unaided Responses (Total n=402)



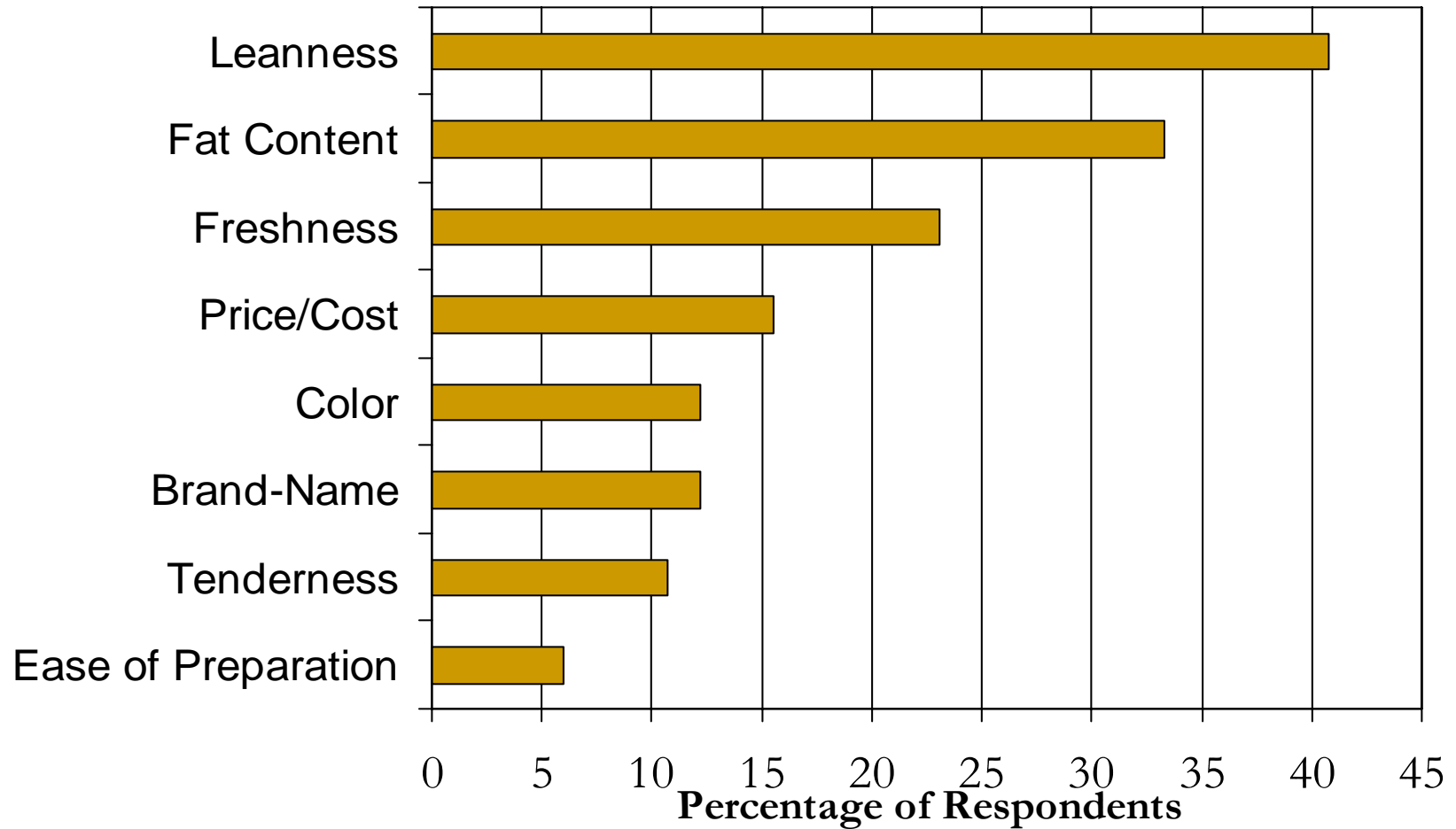
# Quality Desired in Pork Breakfast

Products: Unaided Responses (Total n=402)



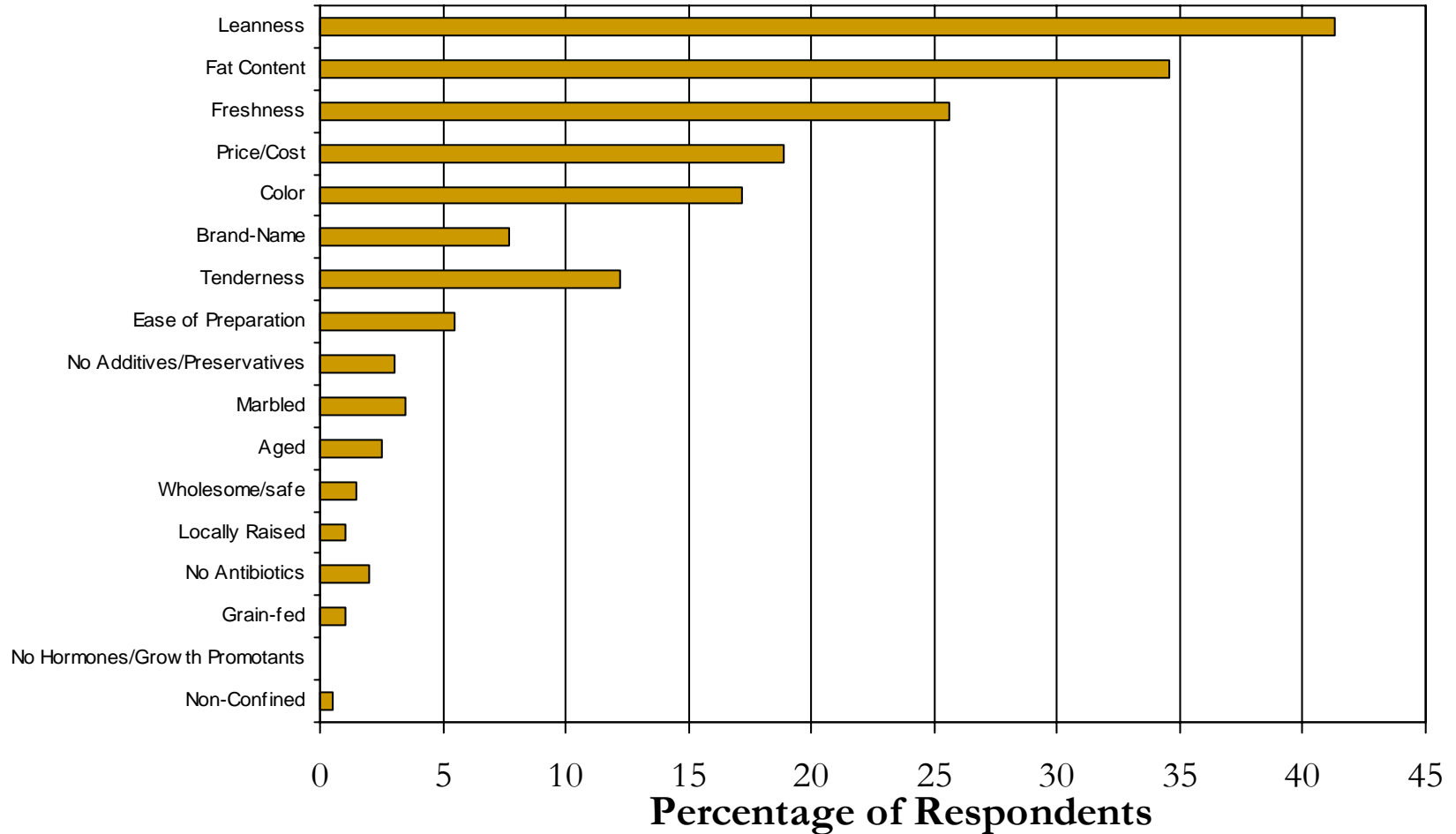
# Quality Desired in Pork Breakfast

Products: Unaided Responses (Total n=402)

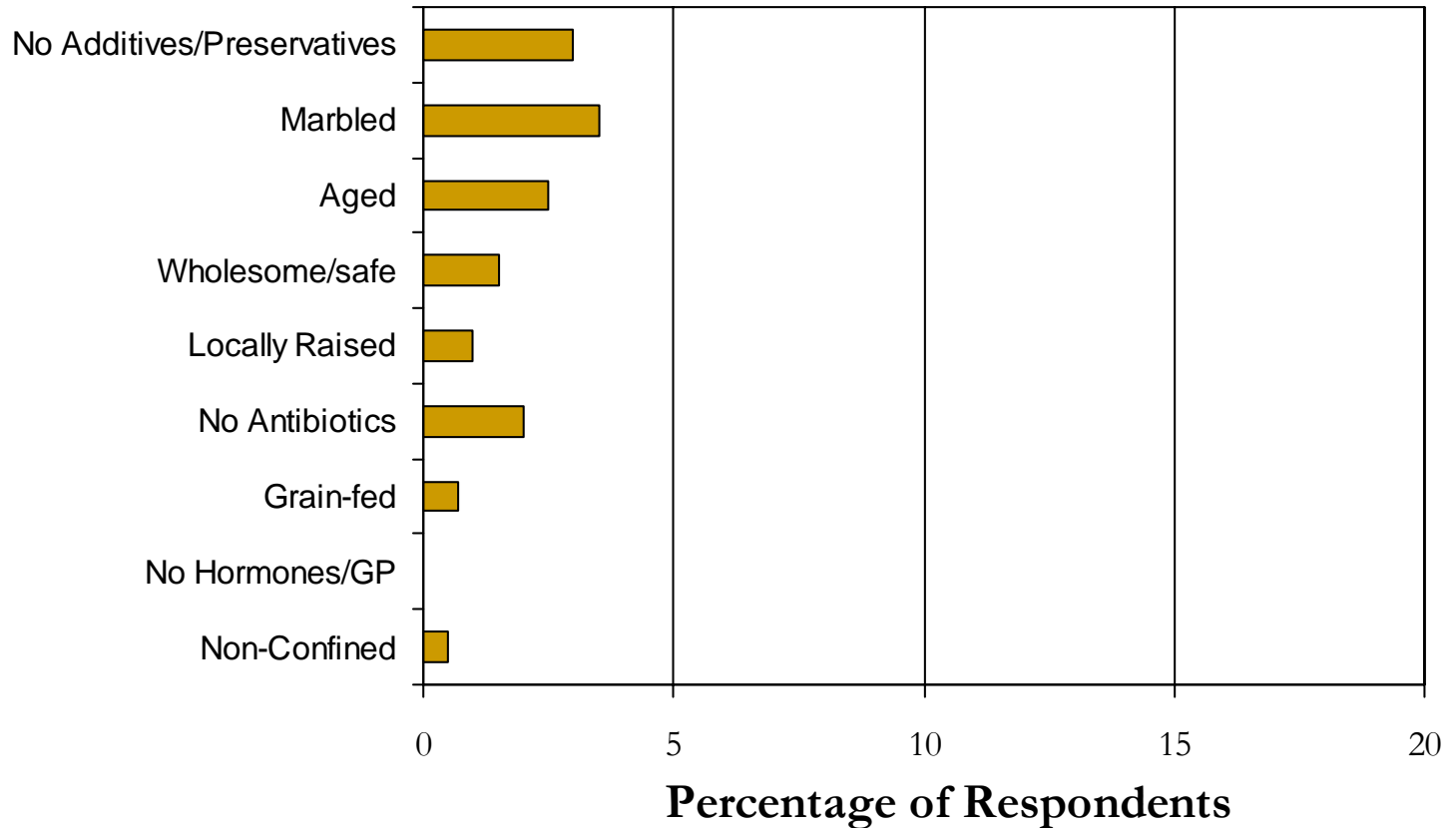


# Quality Desired in Pork Lunch/Dinner

Products: Unaided Responses (Total n=402)

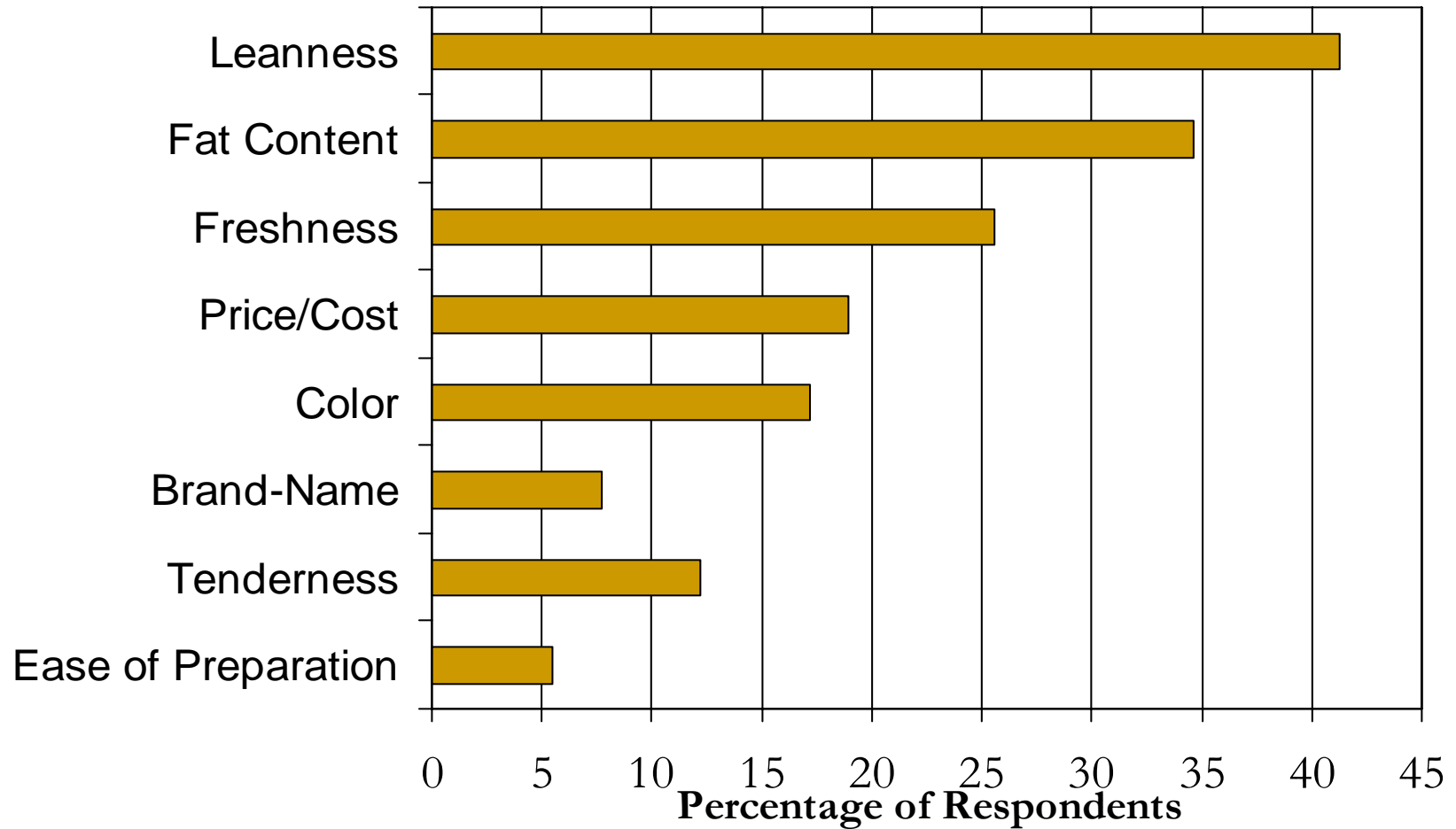


# Quality Desired in Pork Lunch/Dinner Products: Unaided Responses (Total n=402)



# Quality Desired in Pork Breakfast

Products: Unaided Responses (Total n=402)



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# Follow-up on Quality: Rank of Importance of Offered Quality Attributes

- Target what 'We' wanted to know
  - Rank on 1 -10 scale: 10=Highest Importance
    - Choices offered: Freshness, Wholesome/safe, Tenderness, Lean, Color, Fat Content, Ease of Preparation, No Additives/No Preservatives, No Growth Promotant, No Antibiotics, Grain Fed, Marbled, Aged, Raised with Access to Outdoors, Supplied by Local Farmers
-

# Mean Quality Importance Rating

Lunch/Dinner Pork Products: (1 -10 Scale; n=402)

<b>Attribute (Rank order based on the Mean)</b>	<b>Mean</b>
<b>Freshness</b>	<b>9.0</b>
<b>Wholesome/Safe</b>	<b>8.7</b>
<b>Tenderness</b>	<b>8.4</b>
<b>Leanness</b>	<b>8.2</b>
<b>Color</b>	<b>8.1</b>
<b>Fat Content</b>	<b>7.9</b>
<b>Ease of Preparation</b>	<b>7.6</b>
<b>No Additives/Preservatives</b>	<b>7.2</b>
<b>No Growth Promotant</b>	<b>6.7</b>
<b>No Antibiotics</b>	<b>6.7</b>
<b>Marbled</b>	<b>6.1</b>
<b>Aged</b>	<b>6.0</b>
<b>Non-Confined (outdoor access)</b>	<b>5.9</b>
<b>Locally Supplied</b>	<b>5.6</b>

# Mean Quality Importance Rating: At Home

Lunch/Dinner Pork Products: (1 -10 Scale; n=402)

<b>Attribute</b>	<b>Most Important</b>	<b>Second Most Important</b>	<b>% Respondents Naming in Top Three</b>
<b>Freshness</b>	<b>29.9</b>	<b>19.4</b>	<b>62.4</b>
<b>Leanness</b>	<b>11.9</b>	<b>20.1</b>	<b>46.3</b>
<b>Tenderness</b>	<b>8.2</b>	<b>13.2</b>	<b>31.6</b>
<b>Wholesome/Safe</b>	<b>18.2</b>	<b>5.0</b>	<b>28.1</b>
<b>Color</b>	<b>3.0</b>	<b>6.5</b>	<b>19.2</b>
<b>No Additives/Preservatives</b>	<b>4.5</b>	<b>6.0</b>	<b>17.9</b>
<b>Ease of Preparation</b>	<b>4.2</b>	<b>4.7</b>	<b>16.2</b>
<b>No Antibiotics</b>	<b>4.5</b>	<b>6.0</b>	<b>15.7</b>
<b>No Growth Promotant</b>	<b>5.2</b>	<b>6.2</b>	<b>15.7</b>
<b>Supplied by Local Family Farm</b>	<b>1.7</b>	<b>2.0</b>	<b>9.0</b>
<b>Non-Confined (outdoor access)</b>	<b>1.7</b>	<b>2.7</b>	<b>8.5</b>

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# Consumer Reaction to the Phrase “Ohio Born and Raised”

- Response to question: If you saw a Pork product that was advertised with the phrase “Ohio Born and Raised” would you:
    - More attracted than otherwise: 67.2%
    - Less attracted than otherwise: 1.2%
    - Neither more or less attracted: 31.6%
-

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# Why Were Consumers More Attracted?

## Unaided Responses

Reason	Percent
From Ohio/Support Local Economy	75.9%
High Quality/Freshness	16.3
Short Travel for the Meat	8.9
Health/Nutrition	2.2
Price	1.5

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# “Ohio Born and Raised” vs. “Locally Born and Raised” – Are they Different?

- 29.9% indicated ‘Very Similar’
  - 40.8% indicated ‘Somewhat Similar’
  - Remaining 29% – ‘Somewhat or Very Different’
  - Bottom Line: “Ohio Born and Raised” was the ‘Generally Preferred’ Concept
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# What do Consumers Want from Ohio Pork Products? Unaided Responses

Item Mentioned	Percent
Freshness	39.8%
Lean	32.1
Wholesome/Safe	25.1
Grain Fed	14.4
No Antibiotics	14.4
No Additives/Preservatives	14.2
No Growth Promotant	13.2
Non-confined	8.7

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# Premium for “Ohio Born and Raised”

## Ohio Born and Raised with *Attributes*

### ■ Series of questions

- Base Question: Willingness to pay a Premium for Ohio Born and Raised Pork with the “**Attributes You Have Suggested as Being Important**”
    - Premium levels set at +20%, +30%, +40%, +50%
  - Secondary Question: Willingness to pay 10% above or below the Base Question Starting Point
  - Random assignment of Base Question Level to Respondents
    - ~100 consumers at each level
-

# Premium Responses

Ohio Born and Raised with *Attributes*

Initial Premium Level	Percent Indicating they would Pay the Premium
120%	54.0%
130%	40.2
140%	24.0
150%	16.0

# Premium Responses

## Ohio Born and Raised with Attributes

Initial Premium Level Proposed and % Willing	Percent Indicating they would Pay 10% <b><u>Less</u></b> than Initial	Percent Indicating they would Pay 10% <b><u>More</u></b> than Initial
120% (54%-Yes)	77% (110% Premium)	11% (130% Premium)
130% (41%-Yes)	59% (120% Premium)	13% (140% Premium)
140% (24%-Yes)	28% (130% Premium)	5% (150% Premium)
150% (16%-Yes)	20% (140% Premium)	4% (160% Premium)

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# Summary – Ohio Pork Consumer Survey

- Home consumption drives the average consumer
    - Is it the market target for YOUR NICHE MARKET?
  - Quality Drivers - Unaided Responses
    - Leanness or Fatness, Freshness
    - Small market opportunities for non-traditional pork
  - Quality Drivers – Rank of Importance
    - Wholesomeness, Safety, Freshness [top]
    - Product Quality [middle]
    - Specific Attributes [lower]
      - But in relative terms pretty big
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# Premium Responses Summary

Ohio Born and Raised with *Attributes*

- Value in Ohio Born and Raised
  - Value in Attributes Consumers Desire
    - Not able to fully pull out which part contributes the most in the experimental design completed
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# Thinking of Targeted Marketing?

## ■ Know your Target Audience

Who and what is the size of the audience?

What do they want?

■ Wholesome, fresh, safe are a given

■ What else is there?

Will they pay for it?

■ Can you produce and supply it at a **profit** given what they will pay?

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