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OUR PRODUCT-- BEEF-WHAT ARE CONSUMERS SAYING?

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INTRODUCTION

The beef industry has long recognized the importance of quality and consistency in meeting the demands of customers in the marketplace. The critical nature of these product characteristics was clearly stated in the "War on Fat" report issued by the beef industry's Value Based Marketing Task Force in 1990. That report expressed the industry's need to define the most appropriate product mix that would achieve the highest level of consumer satisfaction and thus maximize beef demand.

The need for quality and consistency has resulted in several long range research efforts designed to develop technologies that could be used to produce carcasses that satisfy marketplace demands. But as the beef industry is dependent on consumers to drive market share and profitability, a strong data base that defines in-home preparation, endpoint cooking temperature and the relationship of USDA quality grade with these factors is imperative to understanding what makes customers satisfied or dissatisfied with the beef they purchase and consume.

The Beef Customer Satisfaction Project fills that need. Begun in 1993, the project provides solid, comprehensive information on consumer at-home eating experiences. (The findings do not provide information on away-from-home satisfaction of beef.) Using three different retail cuts prepared and evaluated in the homes of moderate to heavy users of beef, the project was primarily designed to:

- ▶ Determine the relationship of beef quality grade level to eating satisfaction
- ▶ Evaluate the importance of demand drivers such as flavor and tenderness to customer satisfaction
- ▶ Obtain information regarding in-home beef cooking methods and product preparation
- ▶ Evaluate general cattle management practices affecting product quality and consistency

Consumers in four cities--Houston, Chicago, Philadelphia and San Francisco--kept journals about their preparation and eating experiences with Top Loin Steaks, Top Sirloin Steaks and Top Round Steaks. The steaks represented top Choice, low Choice, high Select and low Select grades.

While the interactions between variables were significant and individual components were difficult to single out, analysis of the extensive study data did provide insight into the level of importance of the different factors investigated. Following is a discussion of those components, listed in order of their importance to customer satisfaction.

1. Beef cut played a very major role in customer satisfaction.

Possibly the most important thing the industry can do to improve satisfaction is assure that consumers are using appropriate cuts for the appropriate meals.

Study findings suggest that the greatest impact on customer satisfaction may be achieved by improving the eating quality of any cut to the next highest plateau of satisfaction. That is, significant progress would be gained if the Top Round could achieve the satisfaction expectation of the Top Sirloin and the Top Sirloin achieve that of the Top Loin.

Among the cuts studied, Top Sirloin Steak requires the most attention, especially in terms of consistent quality. While USDA quality grade did not affect consumer ratings of this cut, Top Sirloin's sensitivity to endpoint temperature would indicate that selecting an appropriate degree of doneness and method of cookery may be the best method of ensuring optimal eating satisfaction.

2. Significant geographical differences in the level of customer satisfaction were evident.

The fact that consumers in each of the four cities rated similar cuts from the same subprimal differently clearly indicates there were geographical/city effects in the study.

Marketing different cuts appropriately for the geographical region--putting beef in the best possible light for those particular consumers--is critical to effective management of product mix.

3. The method of cookery affected how well consumers liked the finished product.

Much of the method of cookery data are confounded by the degree of doneness to which consumers cooked the meat. Nevertheless, data show that cuts prepared using appropriate cooking methods had a greater chance of getting higher satisfaction scores.

Weather and seasonality also appear to be an influence. For example, consumers in some geographical areas may be more likely to use outdoor grilling, which in this study produced beef that received higher satisfaction ratings.

Increased consumer education in appropriate cooking methods seems warranted--though would be difficult due to cultural differences, the weather, availability of certain appliances, etc.

4. USDA quality grade had a cut-specific impact on customer satisfaction.

The Top Loin Steak was affected by grade, but the Top Sirloin Steak was not. The only quality grade that had a significant impact on Top Round was top Choice.

Higher marbling levels tended to help reduce negative effects of cooking to higher degrees of doneness. The results would suggest that additional research is needed to establish how cooking method/degree of doneness combinations could be used to optimize the various grades of beef cuts available.

Often associated with quality grade, consumer ratings for Actual Tenderness and Flavor Desirability were among several key consumer attributes that were found to be closely related to Overall Like ratings for beef. Increasing customer satisfaction is a complex problem, and by targeting for only one specific trait, such as tenderness, the industry may limit the overall degree of satisfaction achieved in the final product.

5. Degree of doneness did have an effect on customer satisfaction.

For instance, the highest ratings were given to those steaks cooked Medium Rare or less. The affect of degree of doneness, however, was influenced by other factors. More than 80% of consumers in the study cooked their beef to a Medium degree of doneness or higher.

Overall Like ratings in this study were not always directly related to degree of doneness. Top Loin Steaks cooked to Well Done, for example, had ratings similar to those cooked to Medium.

6. Production practices had little influence on customer satisfaction.

Compared to the other factors investigated in this study, mainstream production methods evaluated in the study accounted for a very small fraction of the explained variance in customer satisfaction.

In short this consumer research found:

- ✓Participants loved most of the beef they received
- ✓Most people overcook their beef
- ✓Beef appearance, flavor and tenderness are main drivers of consumer satisfaction
- ✓Outdoor grilling is the preferred beef cooking method
- ✓Consumer expectations drive eating satisfaction.