



# **Meat Product Consumption Habits of North Americans** **By CROP Inc.**

**The Commission for  
Environmental Cooperation of  
North America**

**May 2004**

## ■ Context

- ▶ The **survey** is part of the CEC's work on North America's emerging markets for environmental goods and services and targeted market analysis of consumer interest in and willingness to pay for **selected** environmental goods and services.
- ▶ This work supports current CEC conservation efforts on North America's natural grasslands' species and spaces.

## ■ Goal

- ▶ To find out whether marketing certified (ecolabeled) grass-fed cattle and bison could be a mechanism for conserving the biodiversity of the grasslands while supporting the livelihood of producers.

## ■ Findings of the survey

- ▶ A complementary approach to conserve grasslands biodiversity is through grass-fed cattle or bison.
- ▶ Awareness of the existence of bison meat appears to be quite high in Canada and the United States. The willingness to consume grass-fed meat—and an understanding of the ecological benefits—is high in all three countries.
- ▶ Production of grass-fed meat could be a promising market mechanism to conserve natural grasslands, one of the most threatened ecosystems in North America.

*Chantal Line Carpentier, CEC Environment Economy and Trade Program*

*Jürgen Hoth, CEC's Biodiversity Program*

*Montreal, 5 October 2004*

- ▶ **Context and objectives**
- ▶ **Highlights**
  - Methodology
  - Results analysis
  - Behavior involving food products in general
  - Search for information about food products
  - Ethical consumption and various concerns
- ▶ **Meat consumption habits in general**
  - Purchasing habits
  - Consumption frequency
- ▶ **Organic meat and grass-fed meat**
  - Awareness and consumption habits
  - Assessment of the price and quality of organic meat and grass-fed meat
  - Willingness to consume based on various criteria
- ▶ **Specialty meat consumption habits**
- ▶ **Bison meat**
  - Awareness and consumption habits
  - Comparing bison meat to traditional meats
- ▶ **Sociodemographic profiles**
- ▶ **Appendix: Questionnaire** (to include as a hotlink)

- **The CEC mandated CROP Inc. to conduct a study in order to establish a profile of North American meat consumers**
- **The aim of this study is to better understand the food consumption habits of North Americans:**
  - ▶ ...related to food products in general
  - ▶ ...related to organic meat and grass-fed meat
  - ▶ ...related to specialty meats
  - ▶ ...and related to bison meat, most specifically
- **The Questionnaire can be found in the Appendix**



## Highlights

## **Food products in general**

- **North American consumers keep informed about the foods they purchase**
  - ▶ More than 6 in 10 respondents are often or sometimes on the lookout for new food products. This behavior is not as common among US respondents (57%).
  - ▶ Half of respondents often read the list of ingredients of food products prior to purchase. Mexican respondents exhibit this behavior to a lesser extent (38%).
  - ▶ 7 out of 10 respondents often (41%) or sometimes (28%) want to know more about the origins of the food products they purchase. This is somewhat less the case with US respondents (61% vs. 73% in Canada and 74% in Mexico).
  
- **Environmental concerns can play a considerable role in the selection of food products**
  - ▶ 6 respondents in 10 admit to often or sometimes having the urge to purchase a food product from companies that are concerned about the environment. This intention is more widely noted among Mexicans (71%) than among US respondents (53%).
  
- **Many consumers are preoccupied with methods used in the production of agricultural goods**
  - ▶ Close to 6 respondents in 10 say they are very or quite concerned about this respect. US respondents appear somewhat less so (50%).
  - ▶ Raising and production methods are the concern most often mentioned (between 17% and 19%).
  - ▶ However, Mexican respondents are more concerned with the risk of disease (26%).
  
- **Products that stem from agriculture that better respects nature are known by more than 4 out of 10 respondents**
  - ▶ Canadian (54%) and US (52%) respondents know these products to a greater extent (as compared to 26% of Mexican respondents)

## Meat consumption habits

- **Of the North American households taking part in the survey, 9 out of 10 have one or more members who consume meat**
  - ▶ Almost 3 out of 4 respondents purchase their meat weekly or more often. Mexicans stand out in this regard (89%).
  - ▶ About one-quarter of the respondents (24%) allot in excess of 30% of their food budget to meat purchases. One-third of Mexican respondents (33%) allocate this same share of their budget.
  - ▶ The grocery store is the place where most Canadian (43%) and US (45%) respondents purchase their meat. Half of Mexican respondents (51%) purchase their meat in a supermarket.
  - ▶ Half of respondents consume beef at least three times a week.
  - ▶ The vast majority of respondents have never consumed bison meat (80%) or horse meat (92%).
  
- **According to one-third of respondents (32%), the appearance of the product is the most important aspect when purchasing meat (this is the case for 41% of Mexican consumers).**

## **Organic and grass-fed meat**

- **Organic and grass-fed meat products benefit from a moderate level of consumer awareness**
  - ▶ The vast majority of Canadian (86%) and US (87%) respondents have heard of organic meat, whereas about one-half of Mexican respondents (52%) say they've heard of it.
  - ▶ Among Canadian and US respondents who have heard of organic meat, close to two-thirds have consumed some. This rate rises to 76% among Mexican respondents.
  - ▶ Almost two-thirds of US respondents (64%) say they know about grass-fed meat. The level of awareness is lower among Mexican respondents (54%) and particularly lower among Canadian respondents (46%).
  - ▶ Among North American respondents that know about grass-fed meat, two-thirds (66%) admit to having consumed some. This rate increases to 75% among Mexican consumers.
  
- **Knowing that a product is organic or grass-fed may increase the frequency of meat consumption**
  - ▶ Almost one-half of North American respondents would tend to consume meat more often if they knew it were organic (47%) or grass-fed (48%). A higher proportion of Mexican respondents exhibits this preference [organic (54%); grass-fed (60%)].
  - ▶ A lower proportion of Canadian (40%) and US (43%) respondents exhibit this preference with respect to grass-fed meat.
  
- **Certifying the “natural” character of a product would have an influence on its consumption.**
  - ▶ Of all North American respondents, 3 in 4 would consume organic or grass-fed meat products if these attributes were featured on a label certifying their natural origin. This proportion rises to 88% among Mexican consumers, but drops to 63% among US consumers.



## **Organic meat and grass-fed meat (continued)**

- **Organic meat is perceived as being more expensive than traditional meats.**
  - ▶ The majority of Canadian (64%) and US (69%) respondents believe that organic meat is much more expensive (Can.: 15%, US: 14%) or more expensive (Can.: 49%, US: 55%) than more traditional meats.
  - ▶ 23% of Mexican respondents share this view (61% mention that it is just as expensive, or even less expensive).
  
- **The price of organic meat is perceived as being closer to that of traditional meats.**
  - ▶ Close to one-third of North American respondents (31%) feel that grass-fed meat is more expensive, 27% believe that it is about the same price, and 24% think that it is cheaper than traditional meats.
  
- **North American consumers would pay up to 25% more for certified organic meat products or certified grass-fed meat products.**
  - ▶ 6 in 10 North American respondents would certainly (18 to 19%) or probably (40 to 41%) pay 25% more for certified organic meat or certified grass-fed meat.
  - ▶ Mexican consumers (71 to 74%) exhibit this willingness to a greater extent when compared to US respondents (48 to 51%).

## **Organic meat and grass-fed meat (continued)**

- **Consumers believe that the quality of organic meat and grass-fed meat is superior to that of traditional meats.**
  - More than half of North American respondents (53 and 50%, respectively) believe that organic meat and grass-fed meat are of higher quality. This opinion is more common among Mexican respondents (60 and 64%, respectively), but less common among US respondents (43 and 37%, respectively).

## **Specialty Meats**

- **Specialty meat consumption is somewhat popular in Canada and the United States.**
  - Almost 4 respondents in 10 in Canada (38%) and the United States (37%) consume specialty meats such as bison or boar. In Mexico, 11% of respondents consume these types of meat.
  - Among all specialty meat types consumed, bison is the most often mentioned (between 47% in Canada and 58% in the United States).

## **Bison Meat**

- **Bison meat benefits from a high level of awareness in Canada and the United States among respondents who do not consume it.**
  - The majority of Canadian (64%) and US (90%) respondents have heard of bison meat, whereas only 6% of Mexican respondents have heard of it.
- **Even if a majority of Canadian and US respondents know about bison meat, those who consume some are still a minority.**
  - Among respondents who know about bison meat, 31% of Canadians and 25% of US respondents say they consume some.

## **Respondents' Profile**

### ■ **The typical profile of Canadian respondents...**

- ▶ Women (68%)
- ▶ Aged between 25 and 44 (46%)
- ▶ Married (66%)
- ▶ Have more than 13 years of education (61%)
- ▶ Work full-time (52%)
- ▶ Household income of \$20,000 to \$60,000 (54%)
- ▶ Household comprised of 2 adults (41%), without children (53%)

### ■ **The typical profile of US respondents...**

- ▶ Women (68%)
- ▶ Aged between 35 and 54 (48%)
- ▶ Married (60%)
- ▶ Have more than 13 years of education (76%)
- ▶ Work full-time (51%)
- ▶ Household income in excess of \$60,000 (44%)
- ▶ Household comprised of 2 adults (37%), without children (59%)

### ■ **The typical profile of Mexican respondents...**

- ▶ Women (80%)
- ▶ Aged between 25 and 44 (52%)
- ▶ Married (81%)
- ▶ Have more than 13 years of education (52%)
- ▶ At home full-time (41%)
- ▶ Household income less than P\$75,000 (67%)
- ▶ Household comprised of 5 or more people (44%), with at least one child (70%)



# Methodology

## Study population

- **Consisted of persons responsible for their household's food purchases who are residents of...**
  - ▶ ...Canada (Quebec, Ontario, Manitoba, Saskatchewan, Alberta and British Columbia)
  - ▶ ...the United States (California, New York, Montana, North Dakota, South Dakota, Nebraska, Wyoming, Colorado, Kansas, Oklahoma, Texas, New Mexico, Vermont)
  - ▶ ...and Mexico (Chihuahua, Nuevo León, Coahuila, Durango)
  - ▶ **These jurisdictions were chosen either because they are related to the grasslands or because their inhabitants might be greater meat consumers**

## Sample

- **Probability sample in order to ensure the random and representative selection of eligible individuals**
- **901 telephone interviews completed:**
  - ▶ Canada: 301
  - ▶ United States: 300
  - ▶ Mexico: 300
- **Maximum margin of error associated with each of these sub-samples, 19 times out of 20:  $\pm 5.7\%$  (n=300)**

## Data collection

- Telephone interviews conducted from CROP's call centre facilities located in Montreal
- Collection period: March 25 to April 17, 2004

## Reading the graphs

- When pertinent, statistically significant differences are indicated:
  - ▶ Differences between subgroups: figures are outlined with a callout
  - ▶ Differences between countries: figures are circled
- Such cases involve “over-representation,” when one subgroup of respondents is proportionately more numerous than the rest of the population to display a certain attitude in a statistically significant manner.

## Notes

- The reference base for most graphs excludes respondents from households that do not consume meat.
- The term “North American” includes Canadian, Mexican and US respondents pooled together.



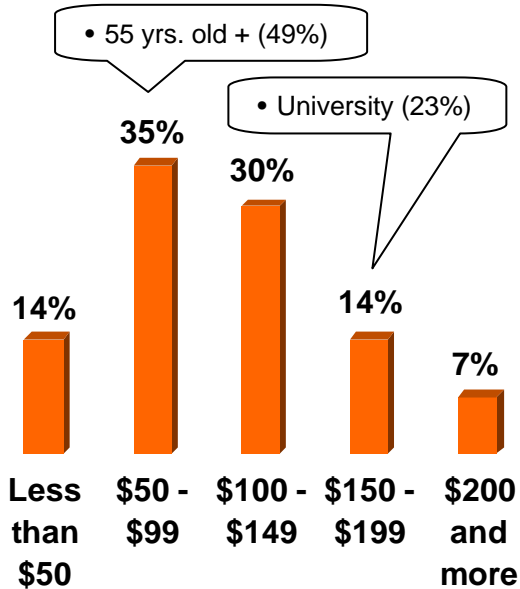
## Results analysis



## **General habits involving food products**

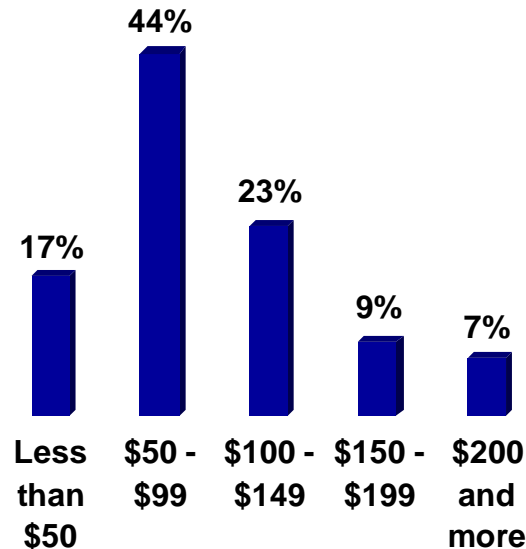


 n=280



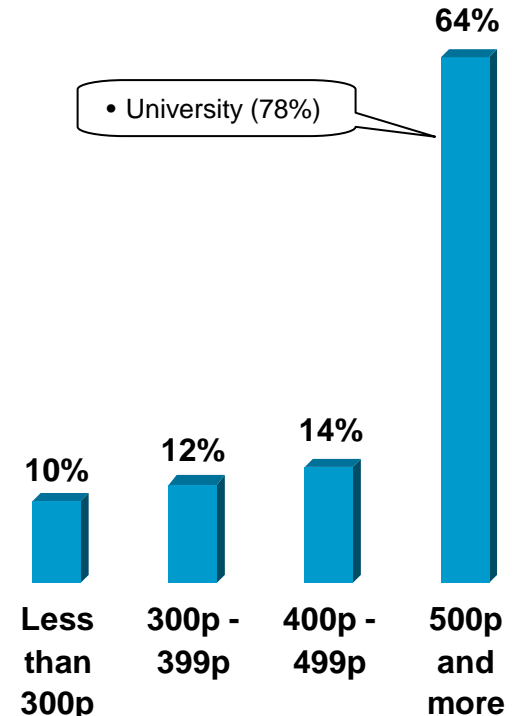
(in Canadian Dollars)

 n=290



(in US Dollars)

 n=288

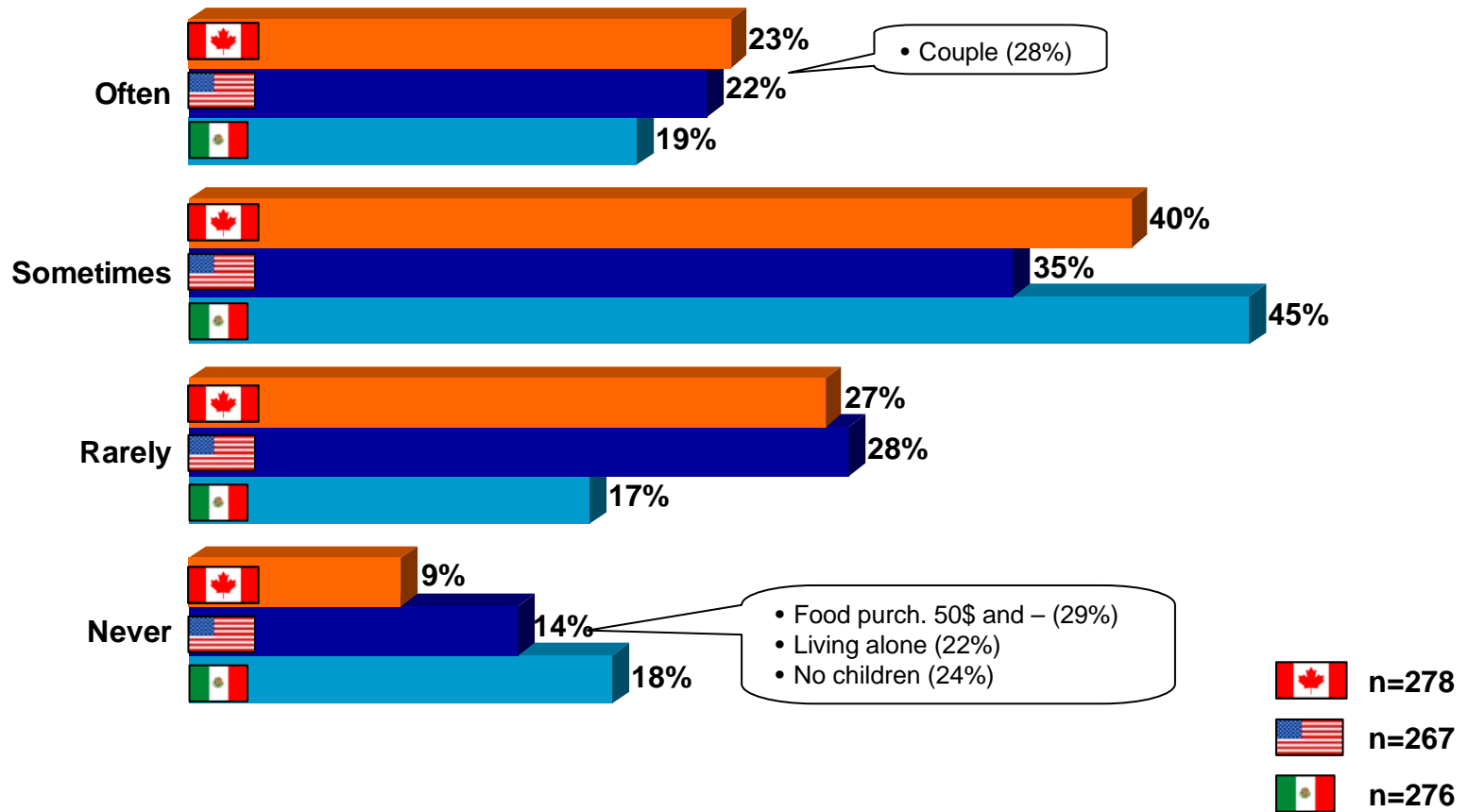


(in Mexican Pesos)

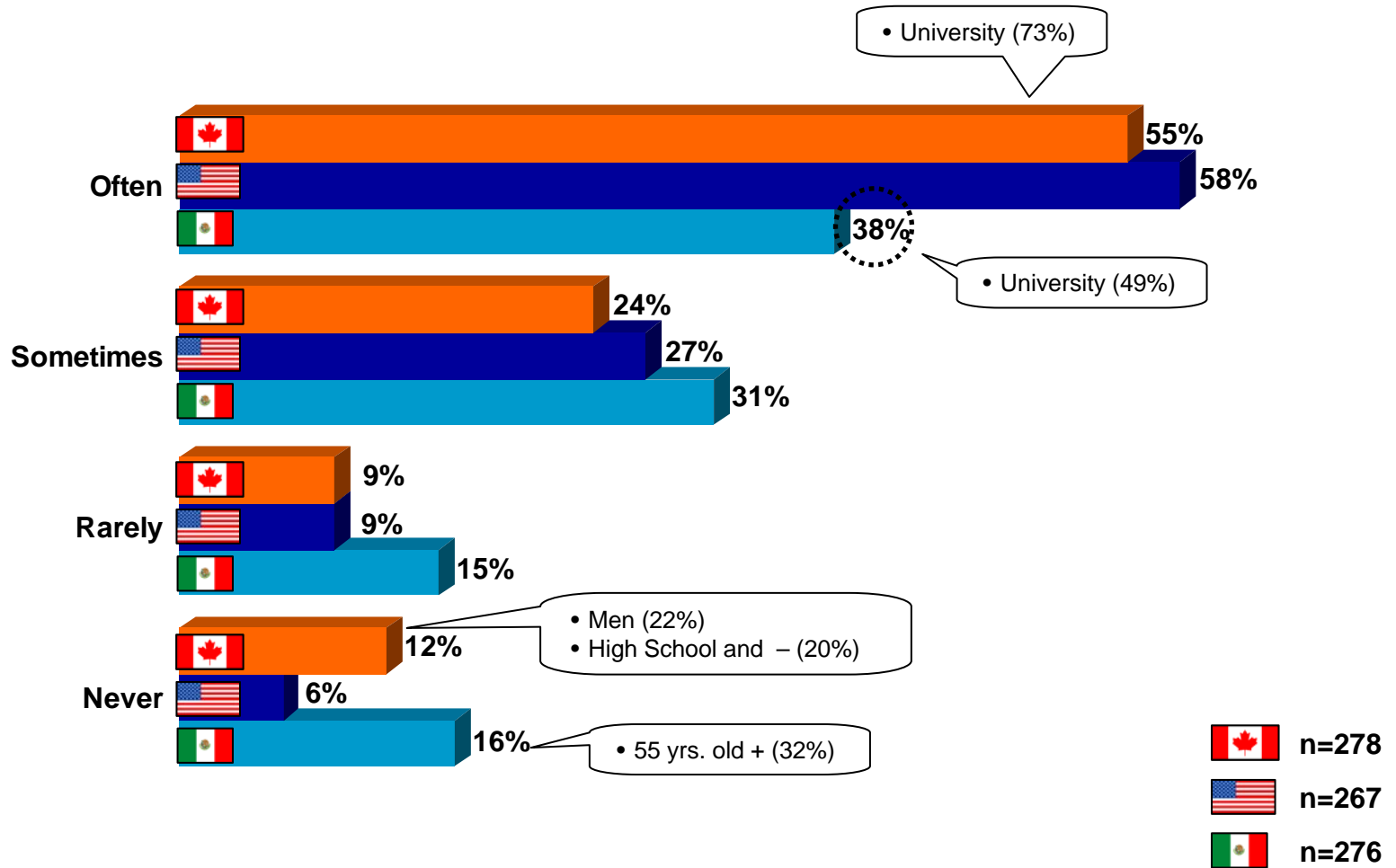
\* Among respondents who submitted an answer



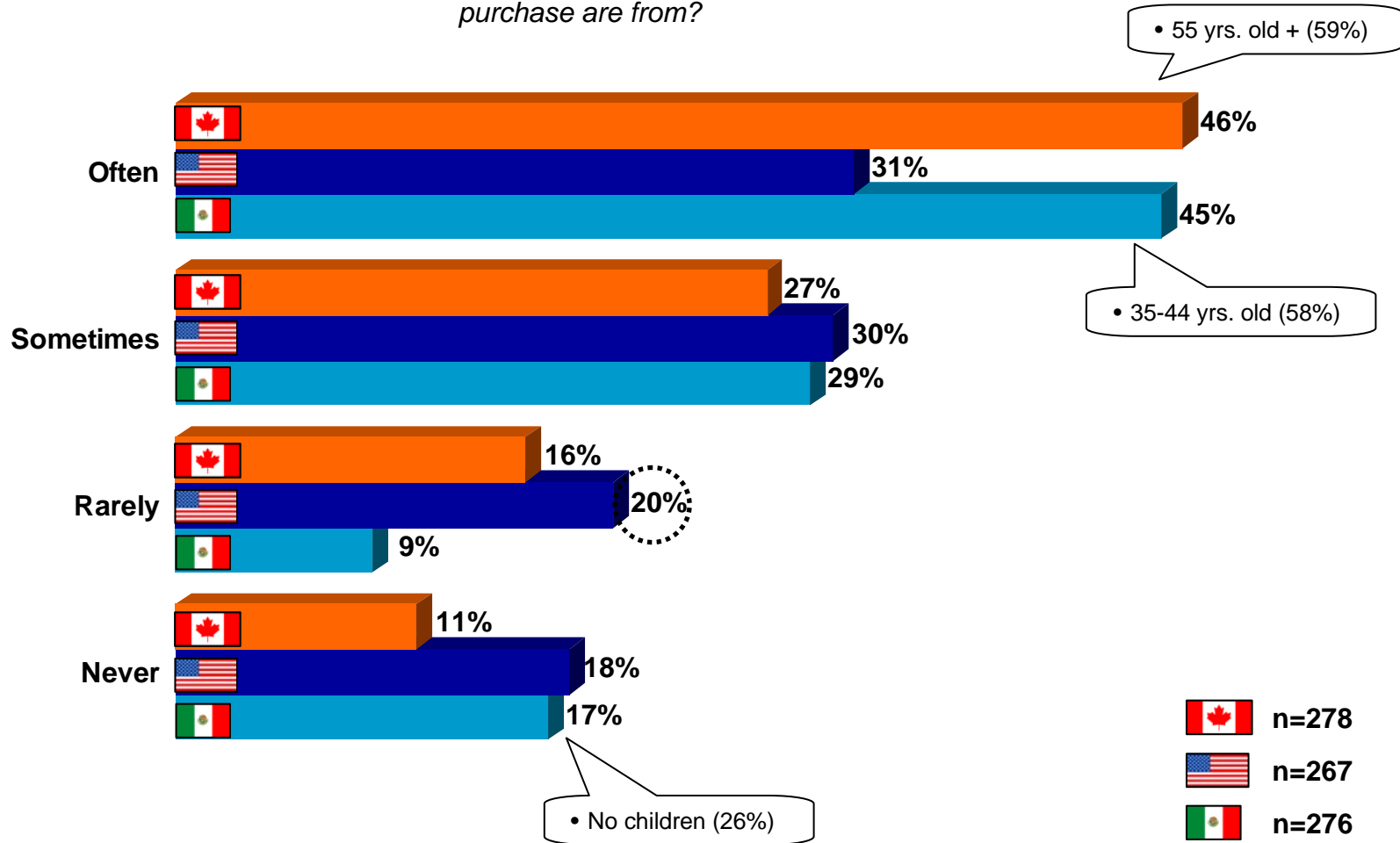
**Search for information about food products**



# Do consumers read the list of ingredients on food products before purchasing them?



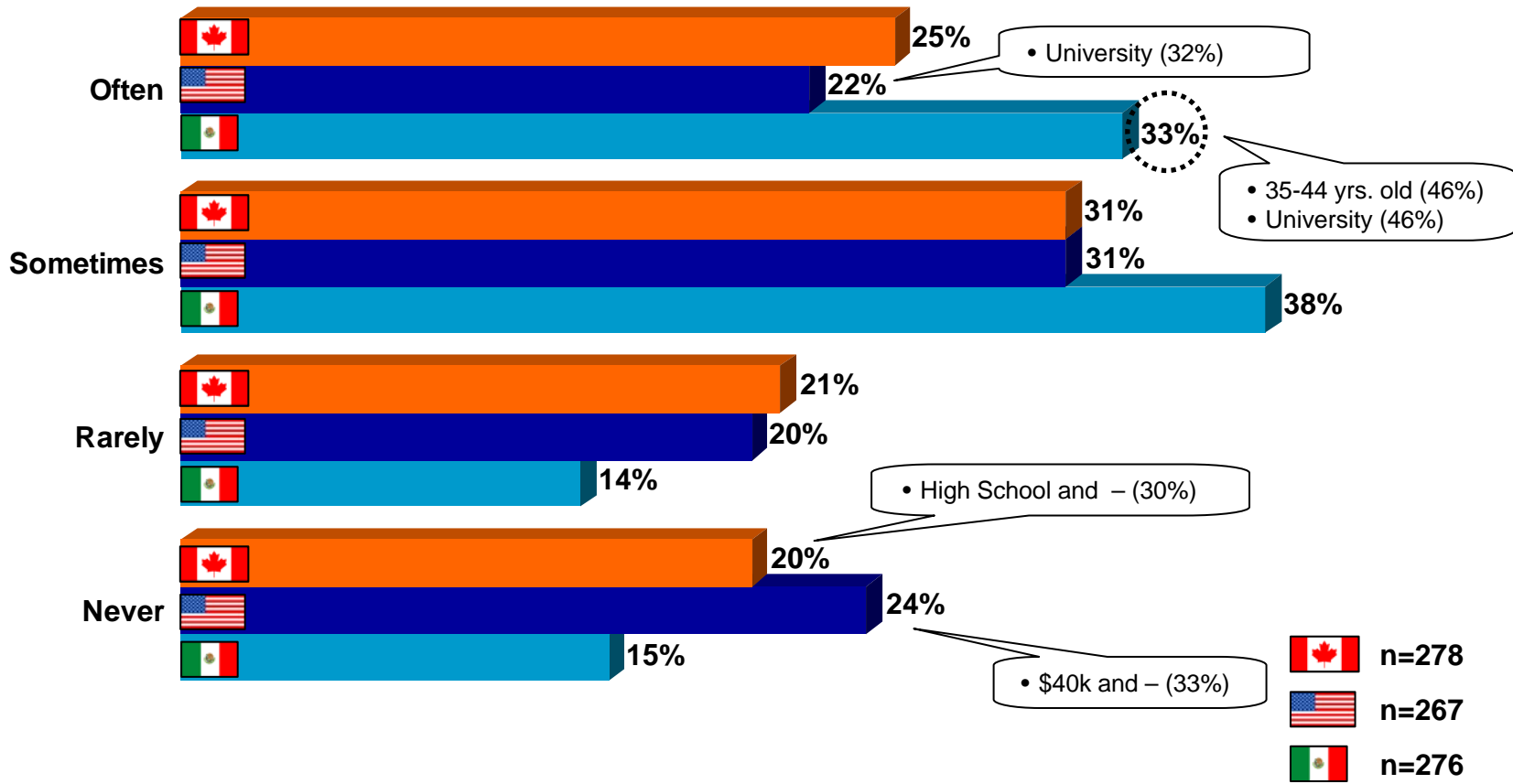
*In general, with regard to food products, do you often, sometimes, rarely or never find yourself trying to know more about where the food products you purchase are from?*

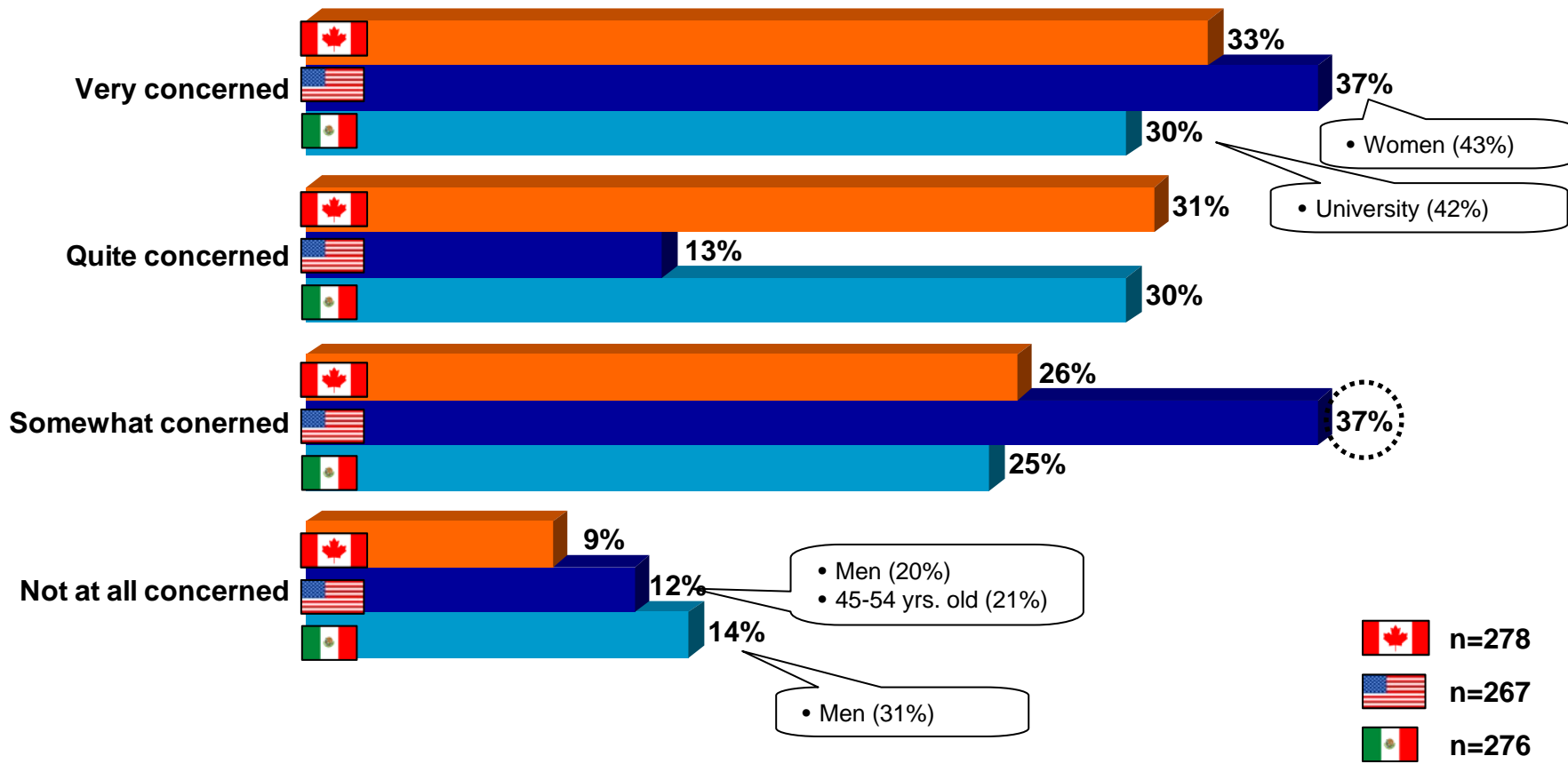




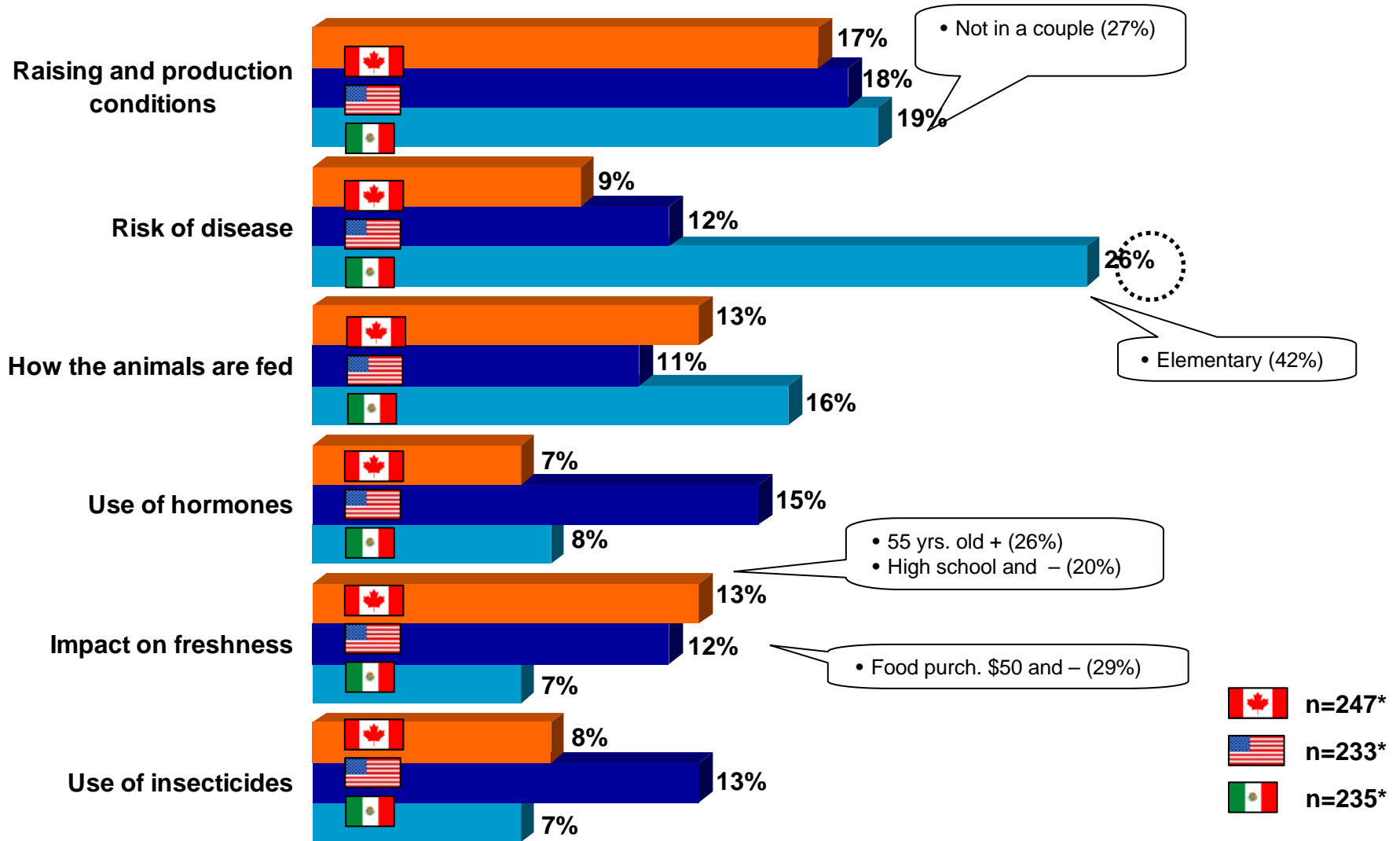
# **Ethical consumption and various concerns**

*In general, with regard to food products, do you often, sometimes, rarely or never find yourself having the urge to purchase a food product because the company that makes it is truly concerned about the environment?*

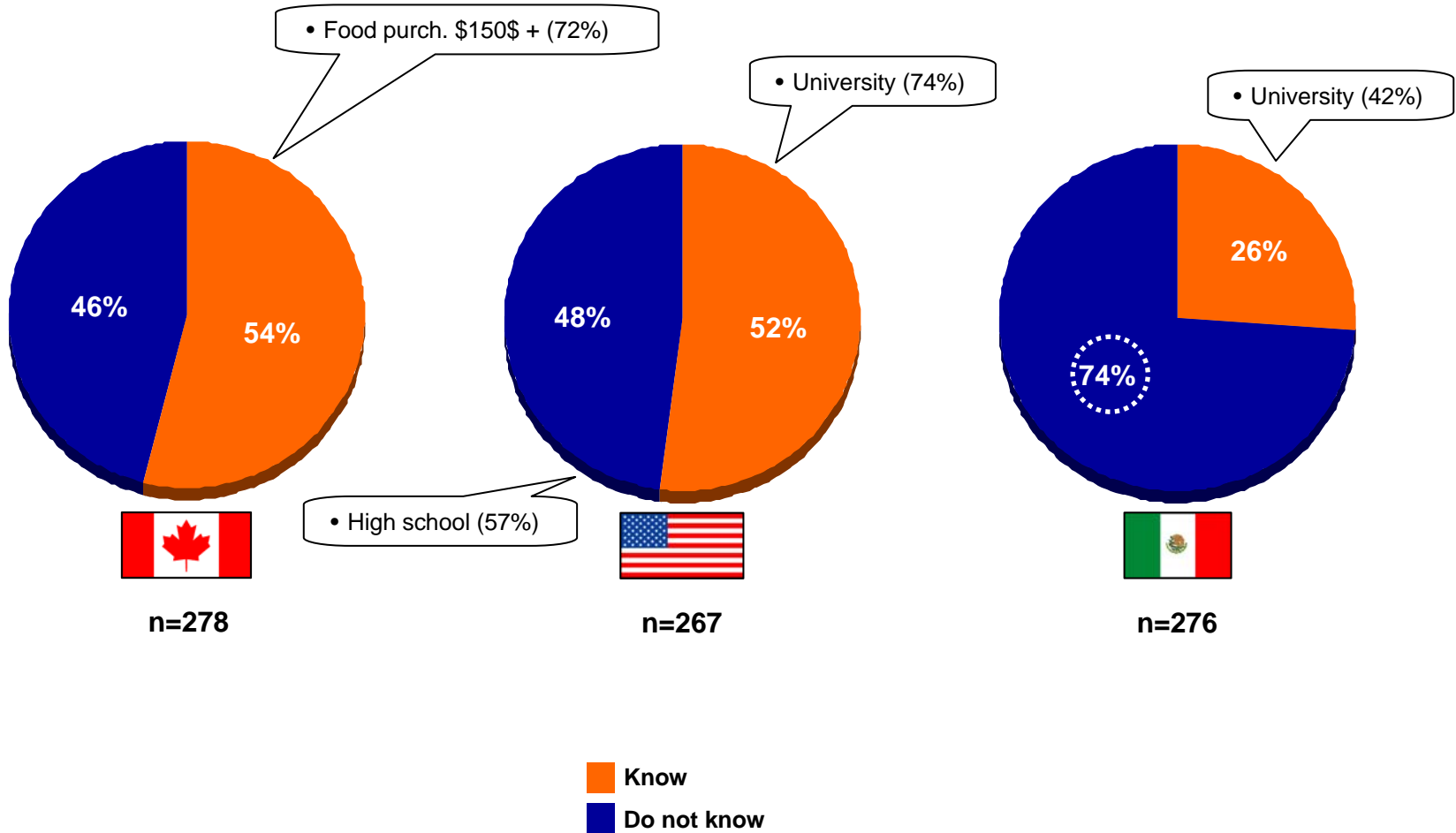






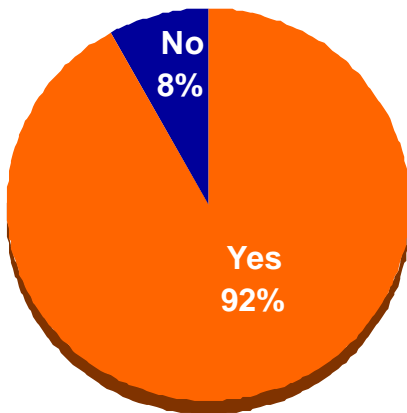


\* Among respondents who are concerned with how agricultural products are made

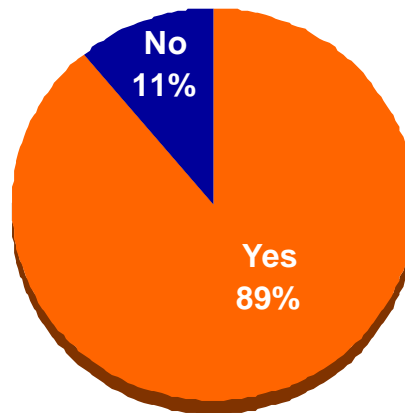




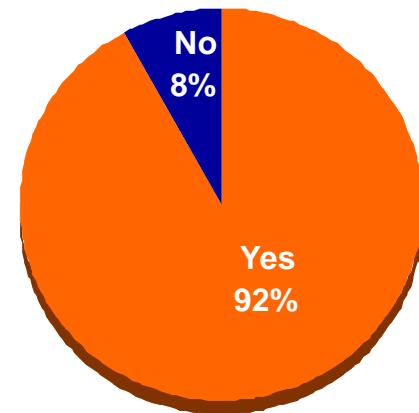
## **Meat consumption habits in general**



n=301



n=300

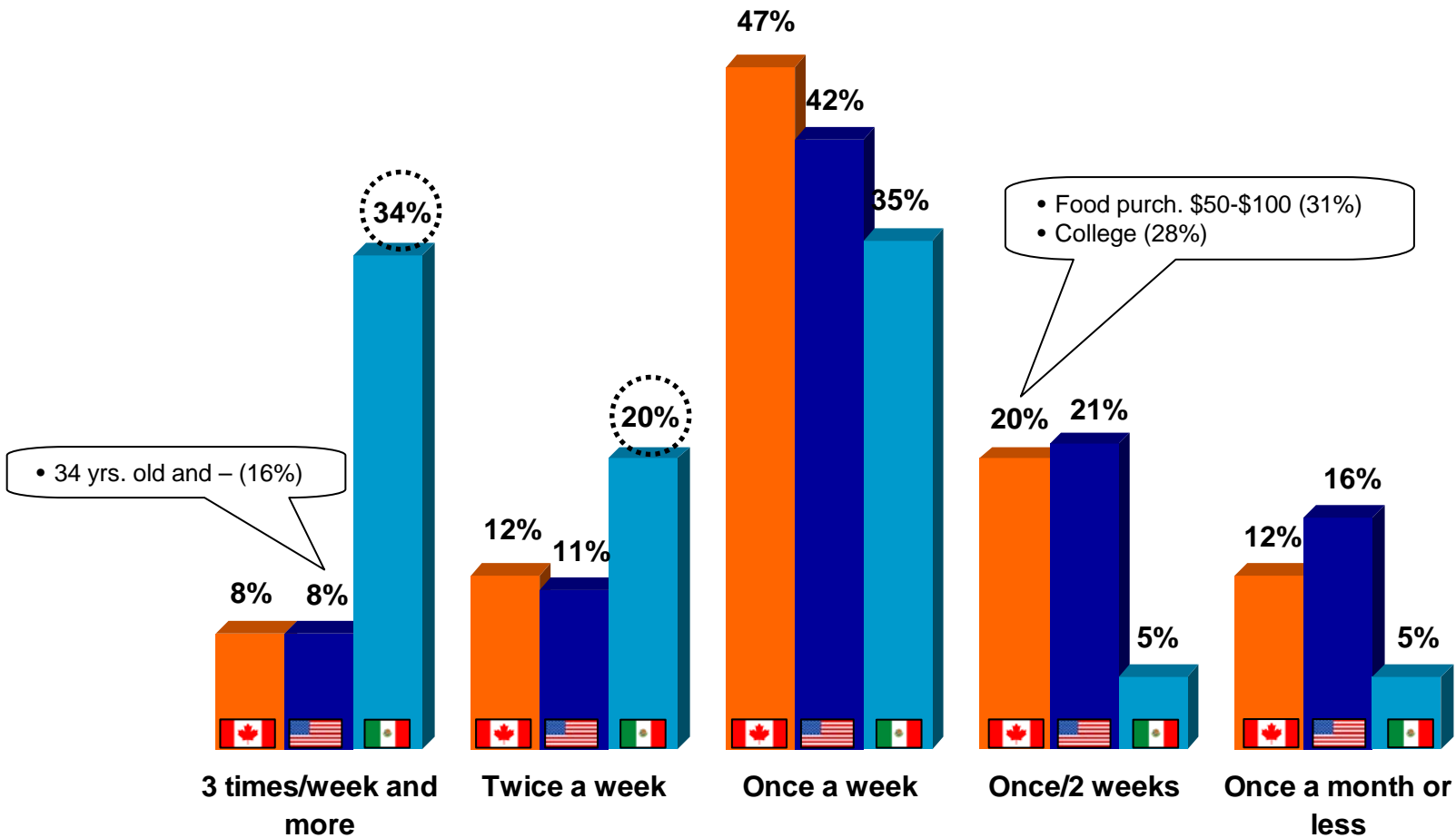


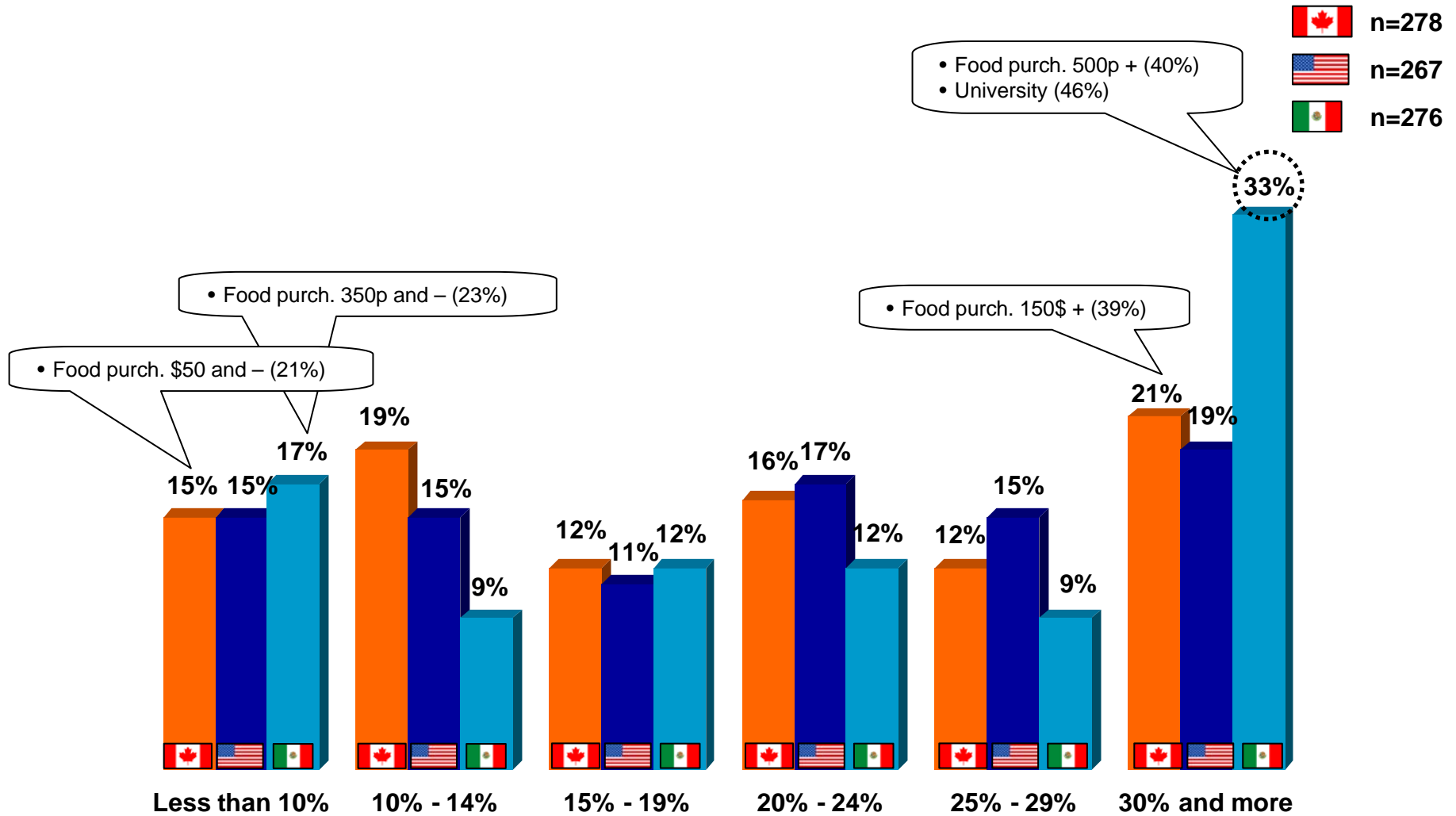
n=300

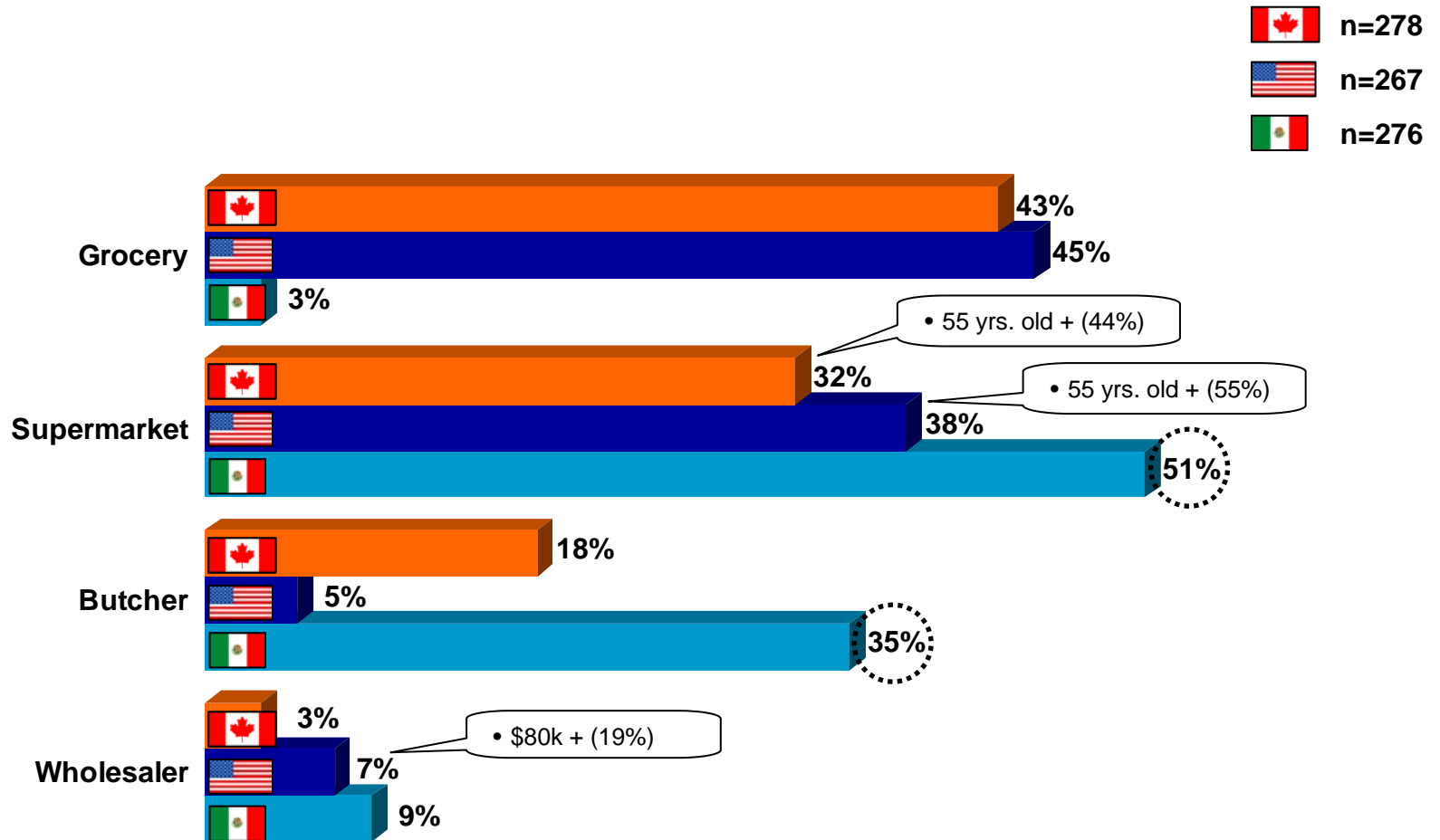


## **Purchasing habits**

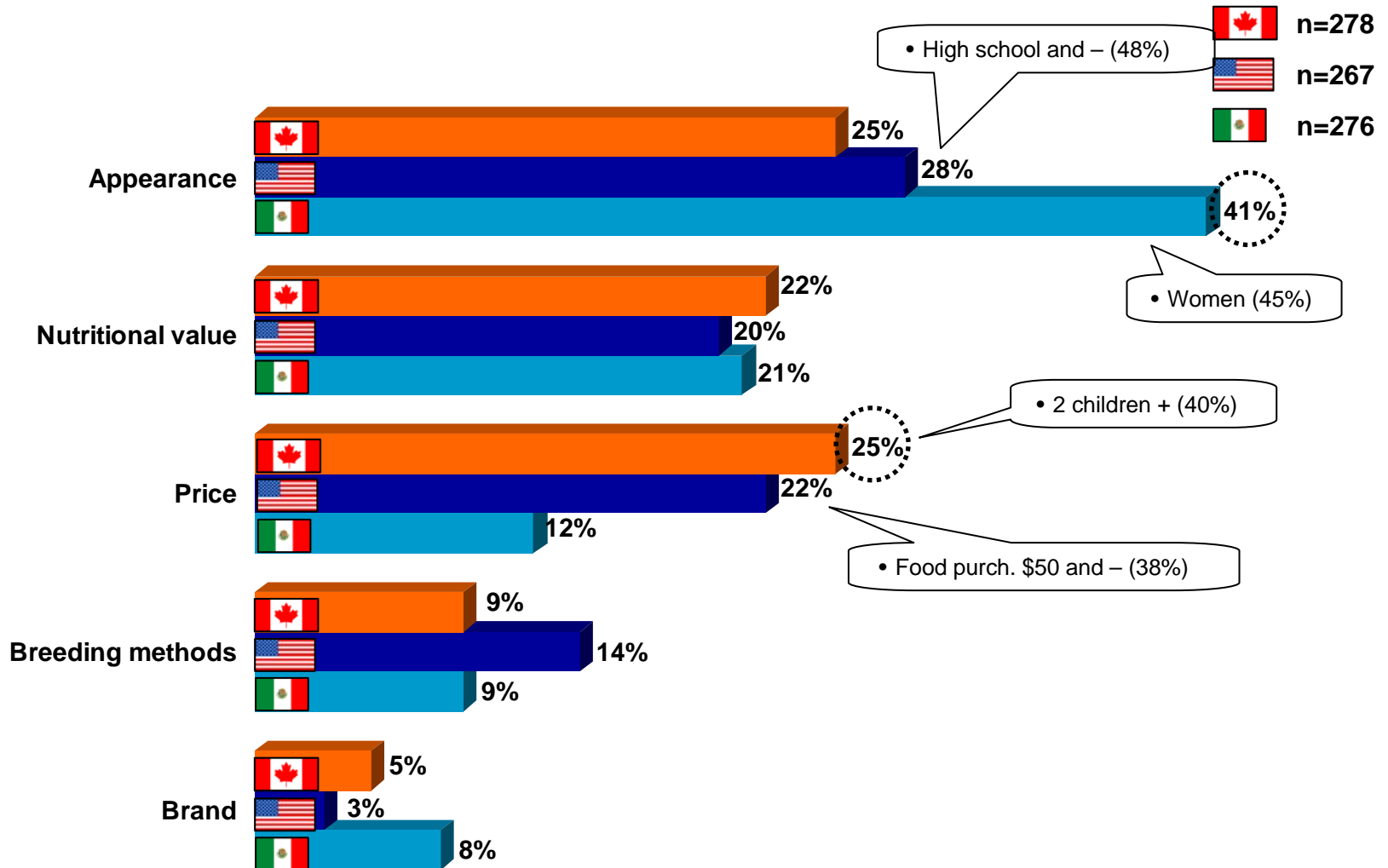
 n=278  
 n=267  
 n=276





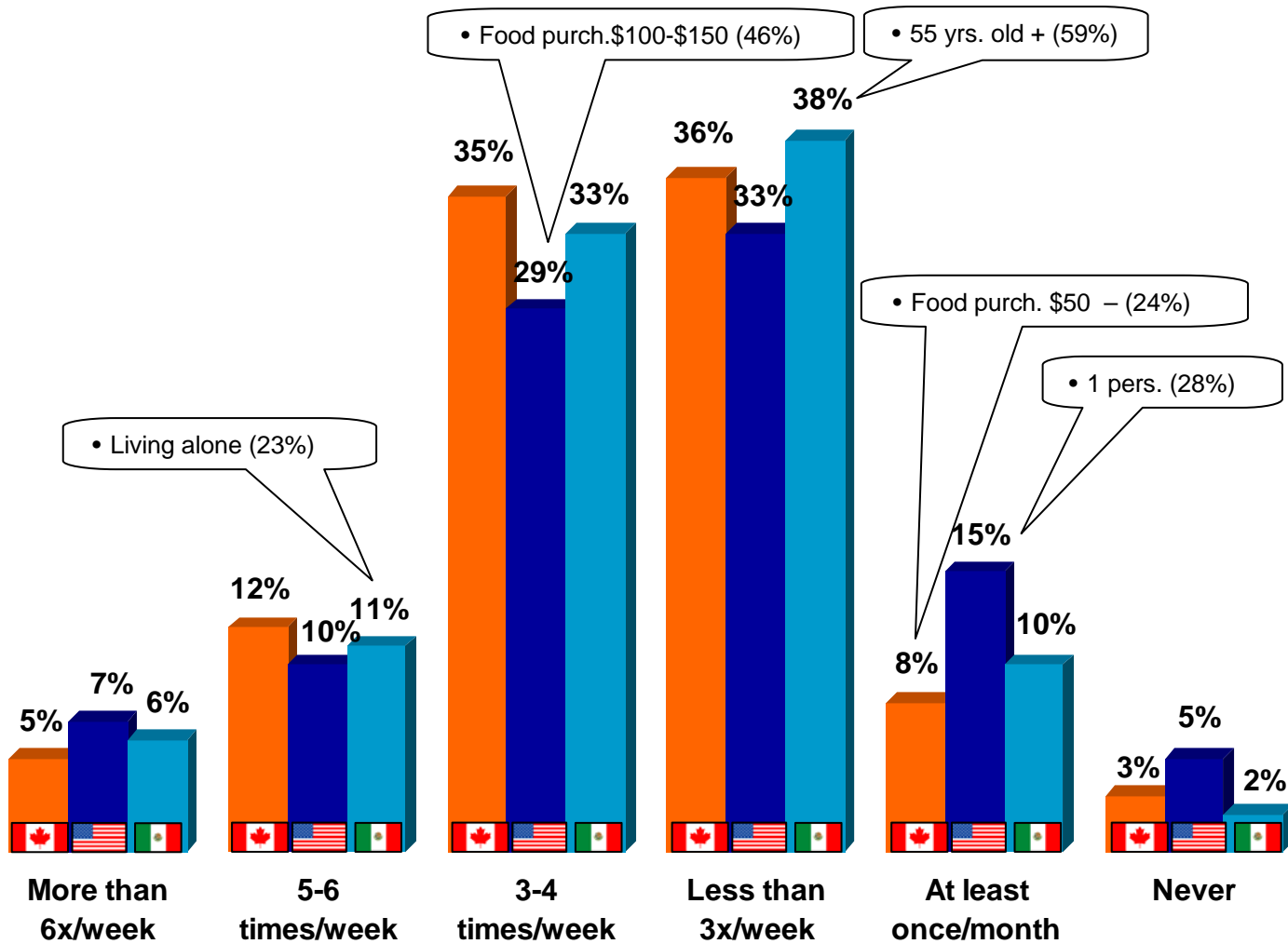




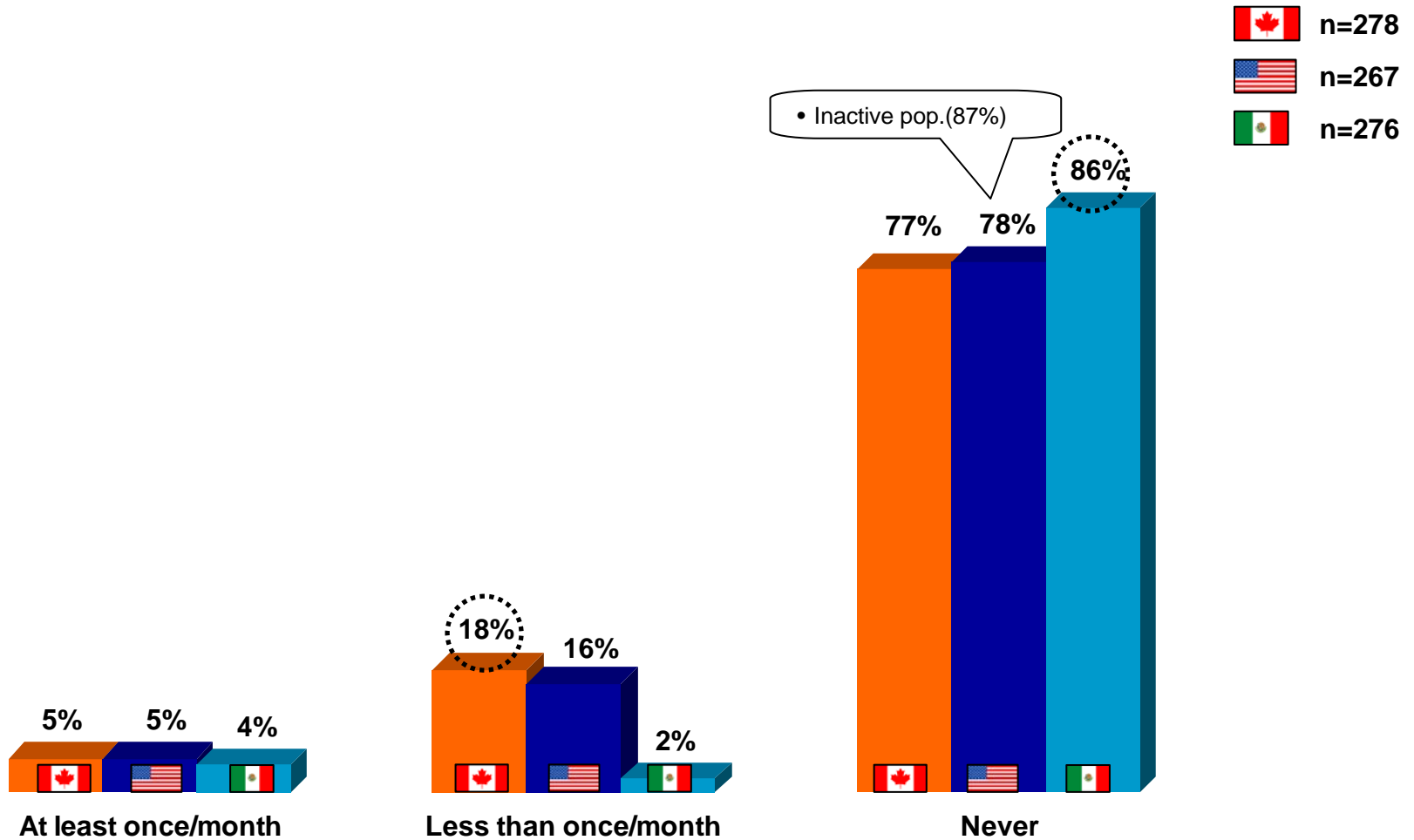




## **Consumption frequency**

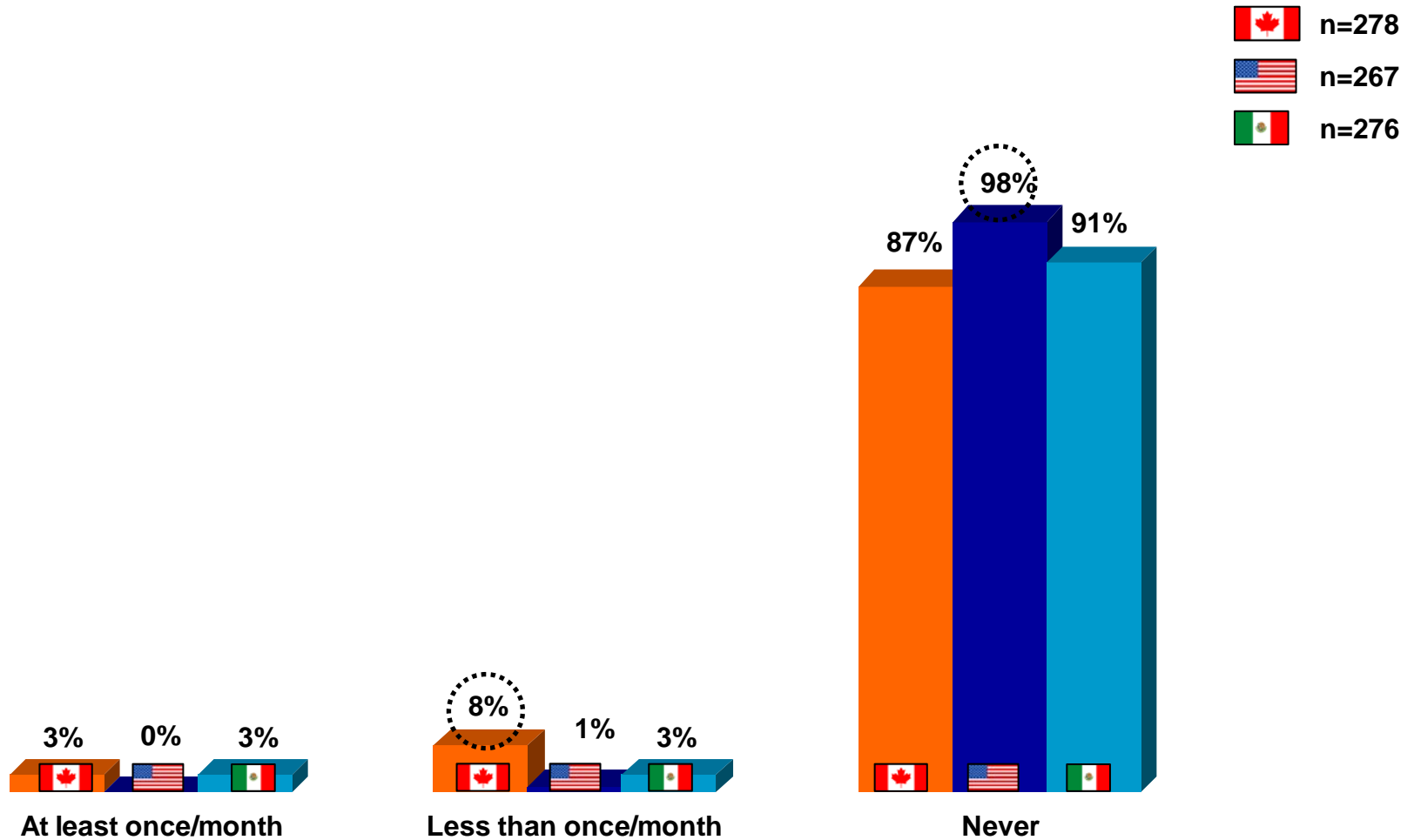


 n=278  
 n=267  
 n=276



\* 1% of US respondents were unable to give an answer

\* 8% of Mexican respondents were unable to give an answer



- \* 2% of Canadian respondents were unable to give an answer
- \* 1% of US respondents were unable to give an answer
- \* 3% of Mexican respondents were unable to give an answer



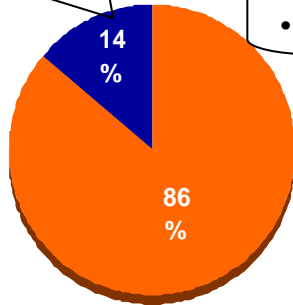
## **Organic meat and grass-fed meat**



## **Awareness and consumption habits**

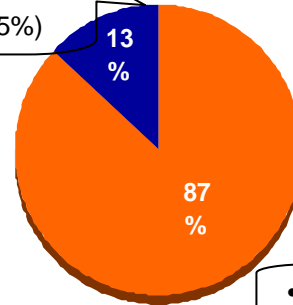
## Organic Meat

• High school and – (22%)



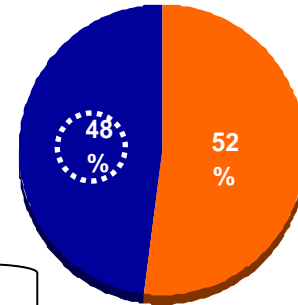
 n=278

• \$40k and – (18%)  
• High school and – (25%)



 n=267

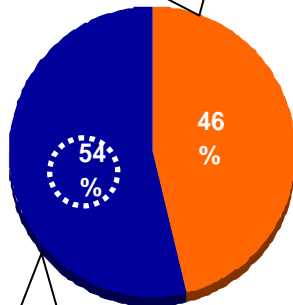
• University (94%)



 n=276

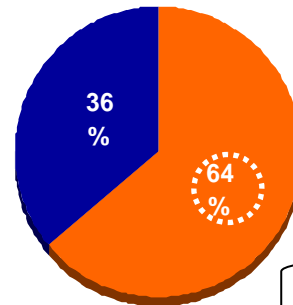
## Grass-fed Meat

• 45-54 yrs. old (64%)



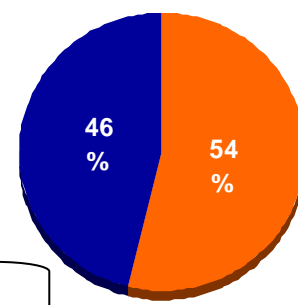
 n=278

• 34 yrs. old and – (65%)





 n=267

• University (80%)

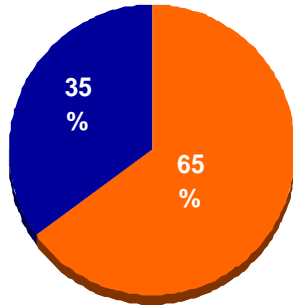


 n=276

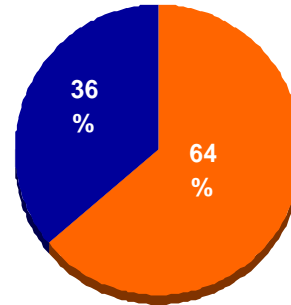
 Aware  
 Not aware



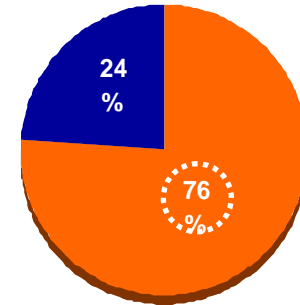
## Organic Meat




 n=239\*

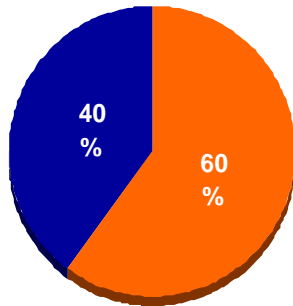



 n=231\*

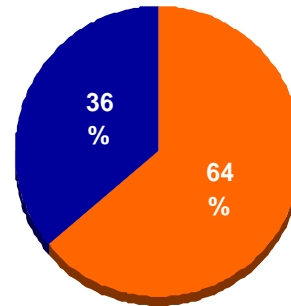



 n=144\*

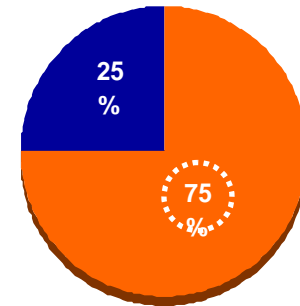
## Grass-fed Meat




 n=129\*\*



 n=170\*\*



 n=150\*\*

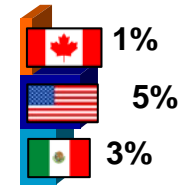
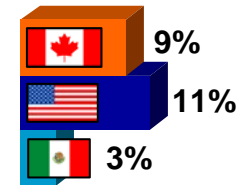
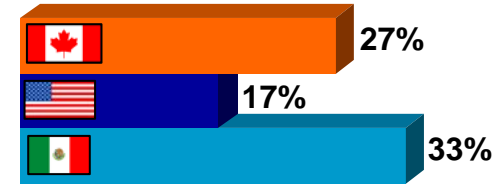
 Have consumed  Have never consumed

\* Among respondents who have heard of organic meat

\*\* Among respondents who have heard of grass-fed meat

## Organic Meat

## Grass-fed Meat



 n=156\*  
 n=148\*  
 n=110\*

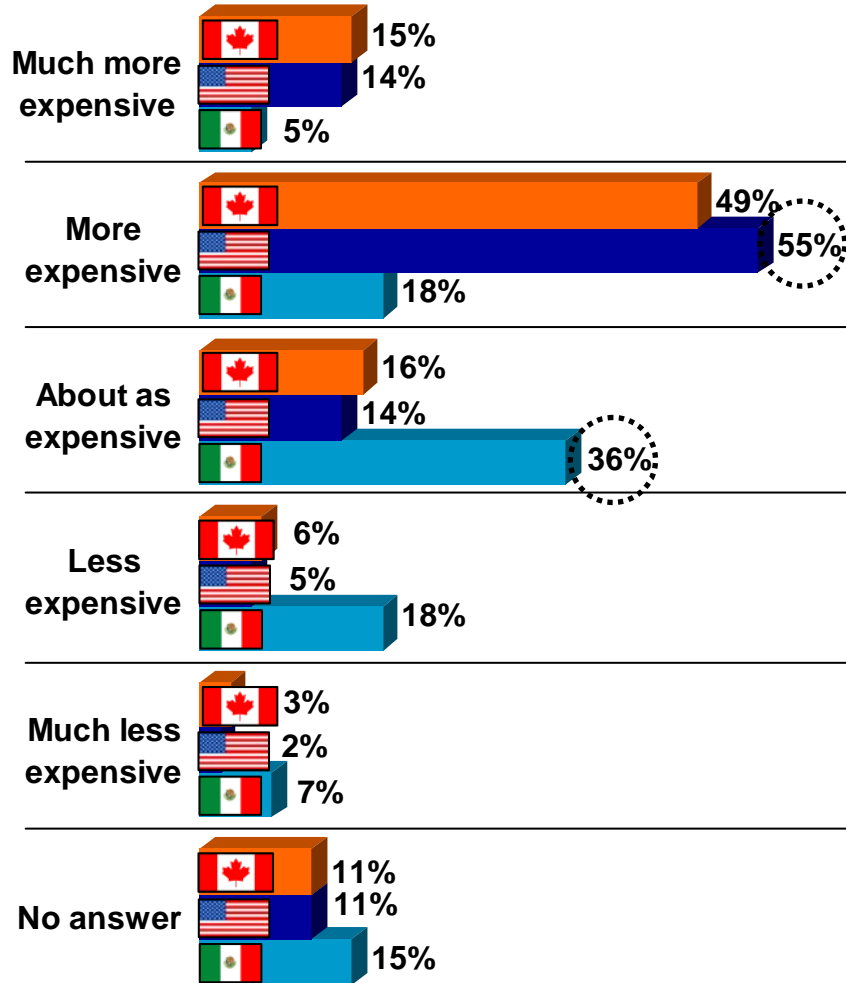
 n=77\*\*  
 n=109\*\*  
 n=112\*\*




\* Among respondents who have consumed organic meat  
 \*\* Among respondents who have consumed grass-fed meat



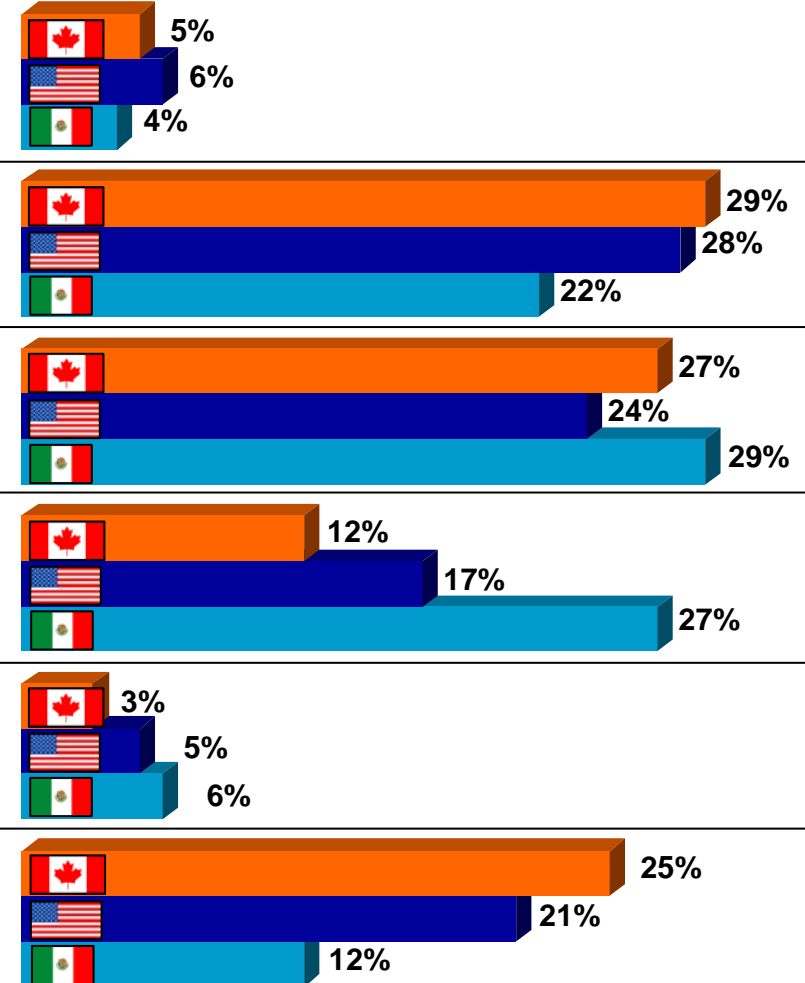
# **Assessment of the price and quality of organic meat and grass-fed meat**




## Organic Meat



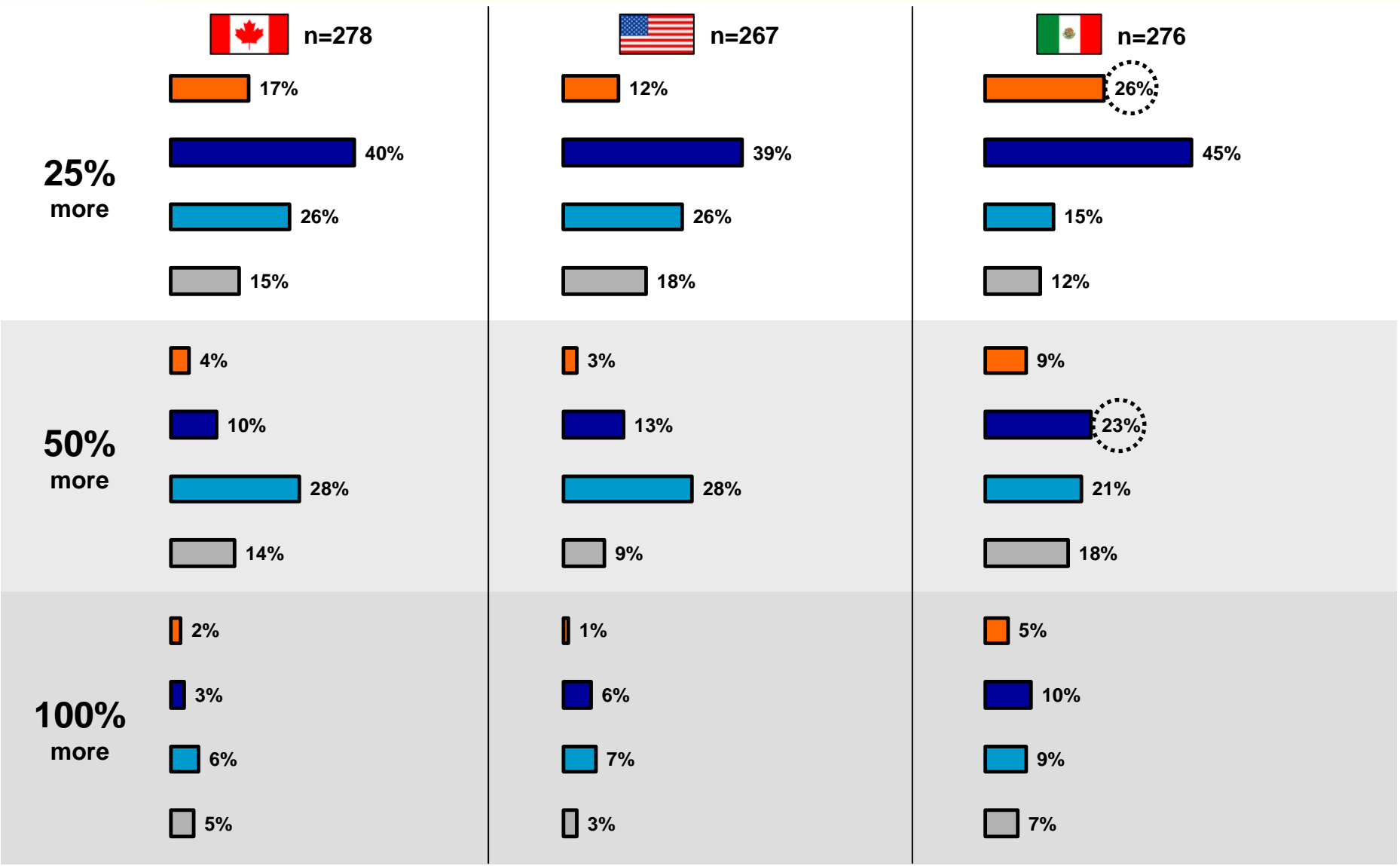
 n=156\* 
  n=148\* 
  n=110\*

## Grass-fed Meat



 n=77\*\* 
  n=109\*\* 
  n=112\*\*










\* Among respondents who have consumed organic meat  
 \*\* Among respondents who have consumed grass-fed meat

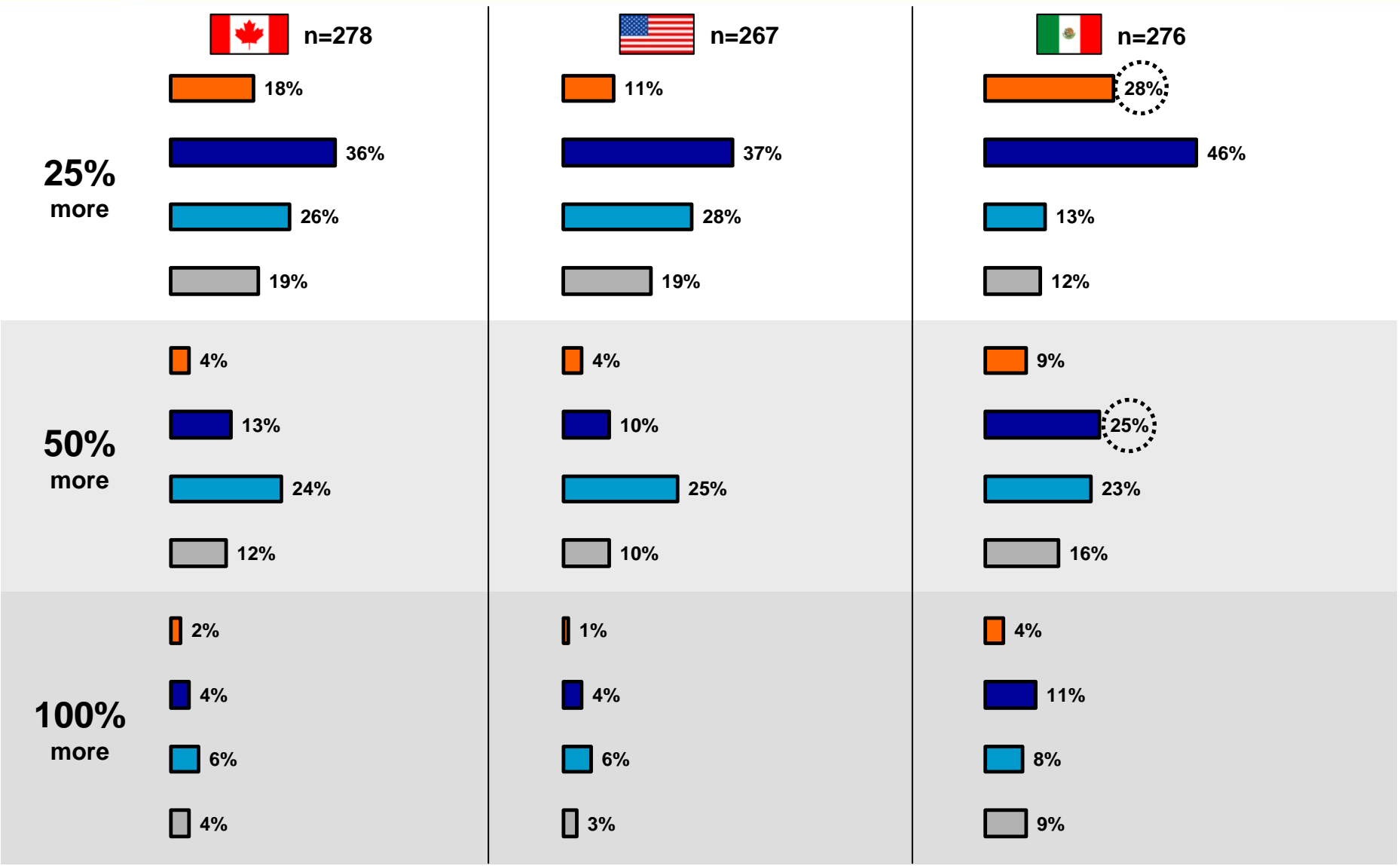


■ Certainly      ■ Probably not  
■ Probably      ■ Certainly not












## Significant Differences

		Certainly	Probably	Probably not	Certainly not
25% more					• 4 people +
		• 34 yrs. old and –	<ul style="list-style-type: none"> <li>• Women</li> <li>• Food purch. \$50-\$100</li> <li>• \$40k-\$80k</li> <li>• College</li> </ul>		
					
50% more				• University	
					
			• Elementary		
100% more					
					
					



■ Certainly      ■ Probably not  
■ Probably      ■ Certainly not

## Significant Differences

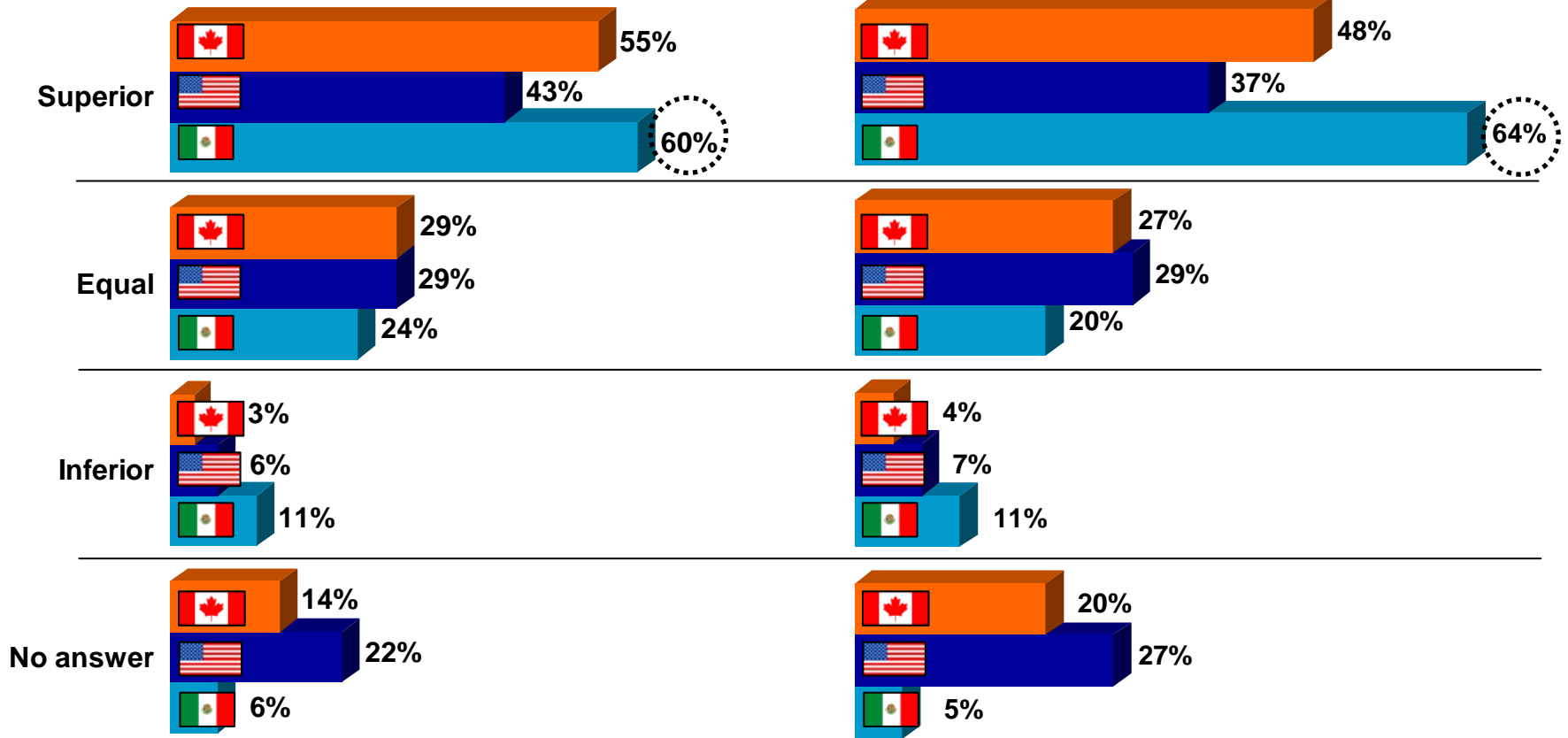
		Certainly	Probably	Probably not	Certainly not
25% more		• \$40k-\$80k		• 3 people	• Men
			• Women • \$40k-\$80k		
					• Meat purch. once/wk.
50% more					
				• University	
					
100% more					
					
					



(to that of more traditional meats)

## Organic Meat

## Grass-fed Meat

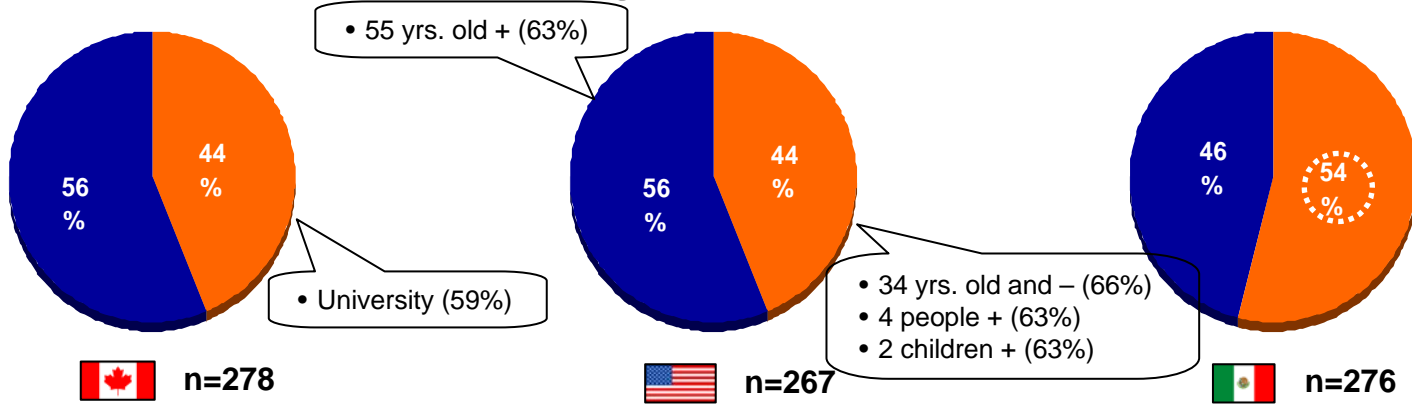


 n=278  
 n=267  
 n=276

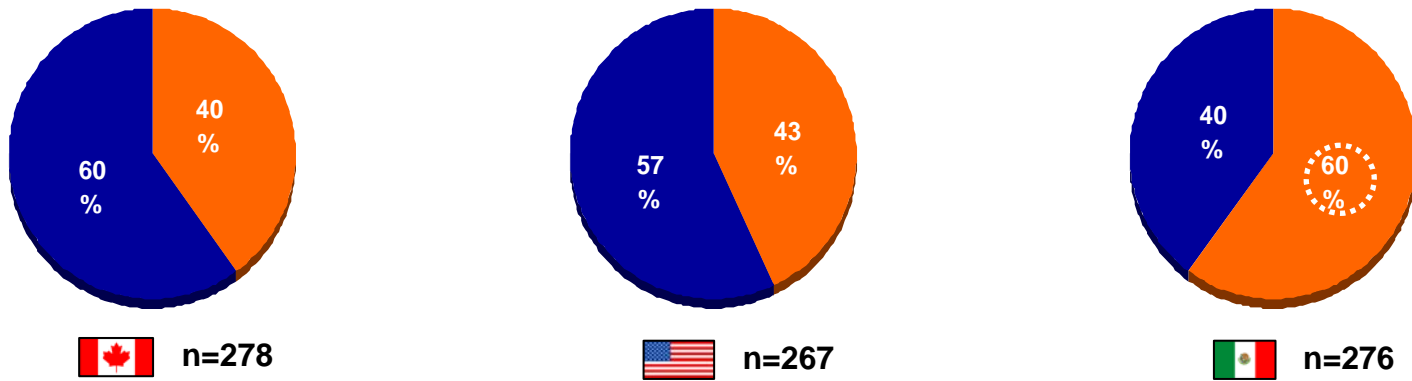


## **Willingness to consume based on various criteria**

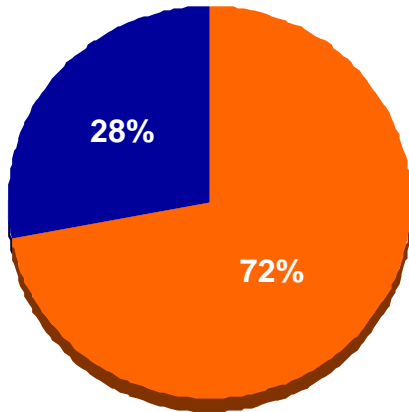
## Organic Meat



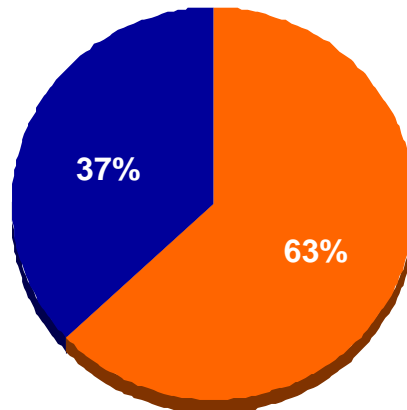
## Grass-fed Meat



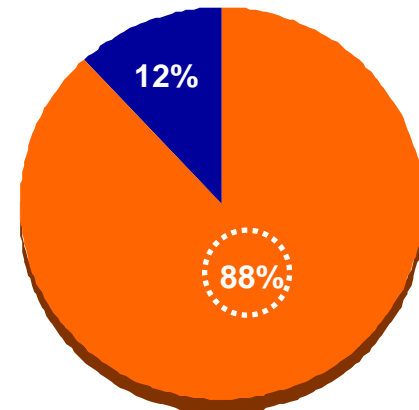
■ Would consume more often  
■ Would not consume more often





n=278

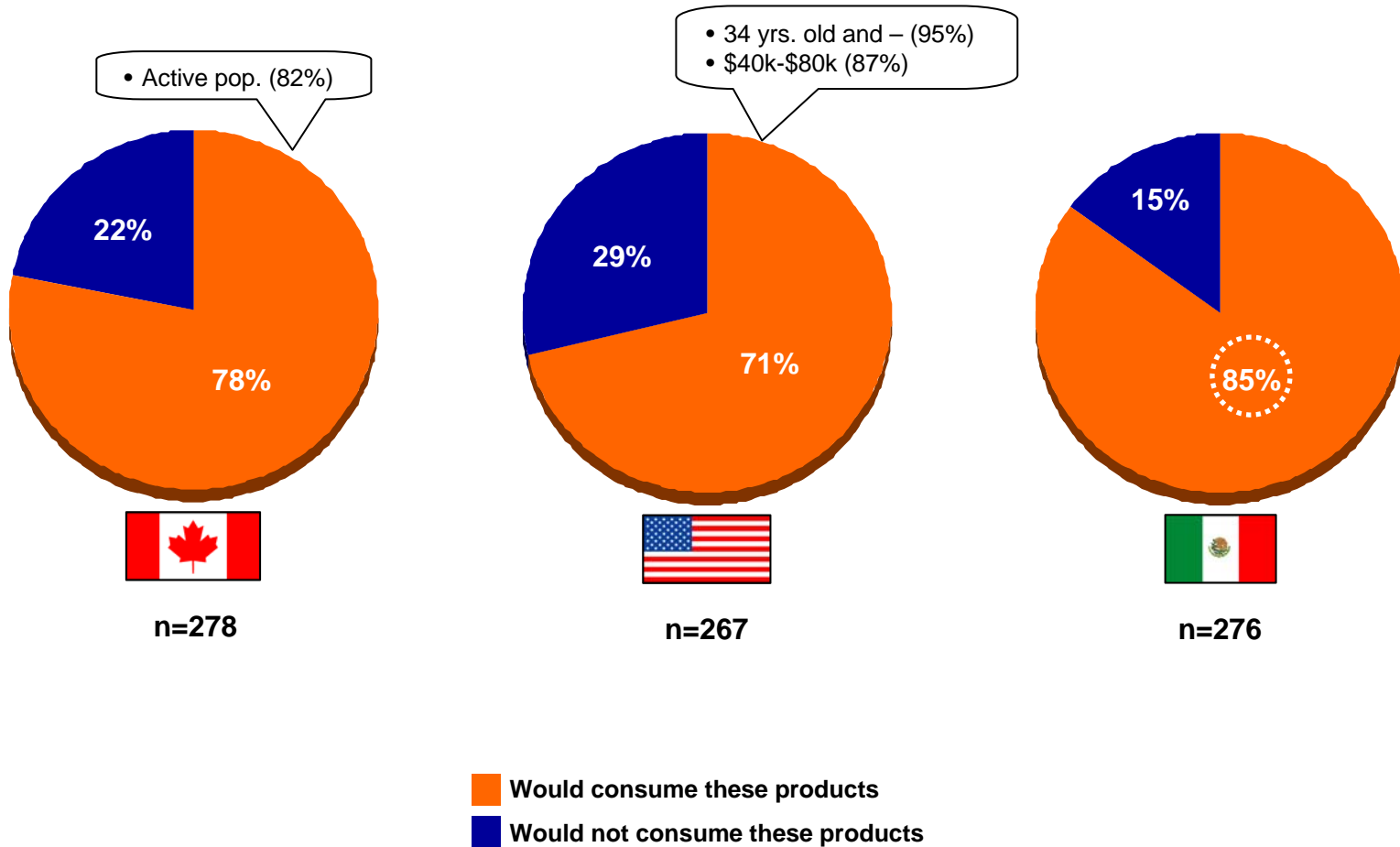


n=267



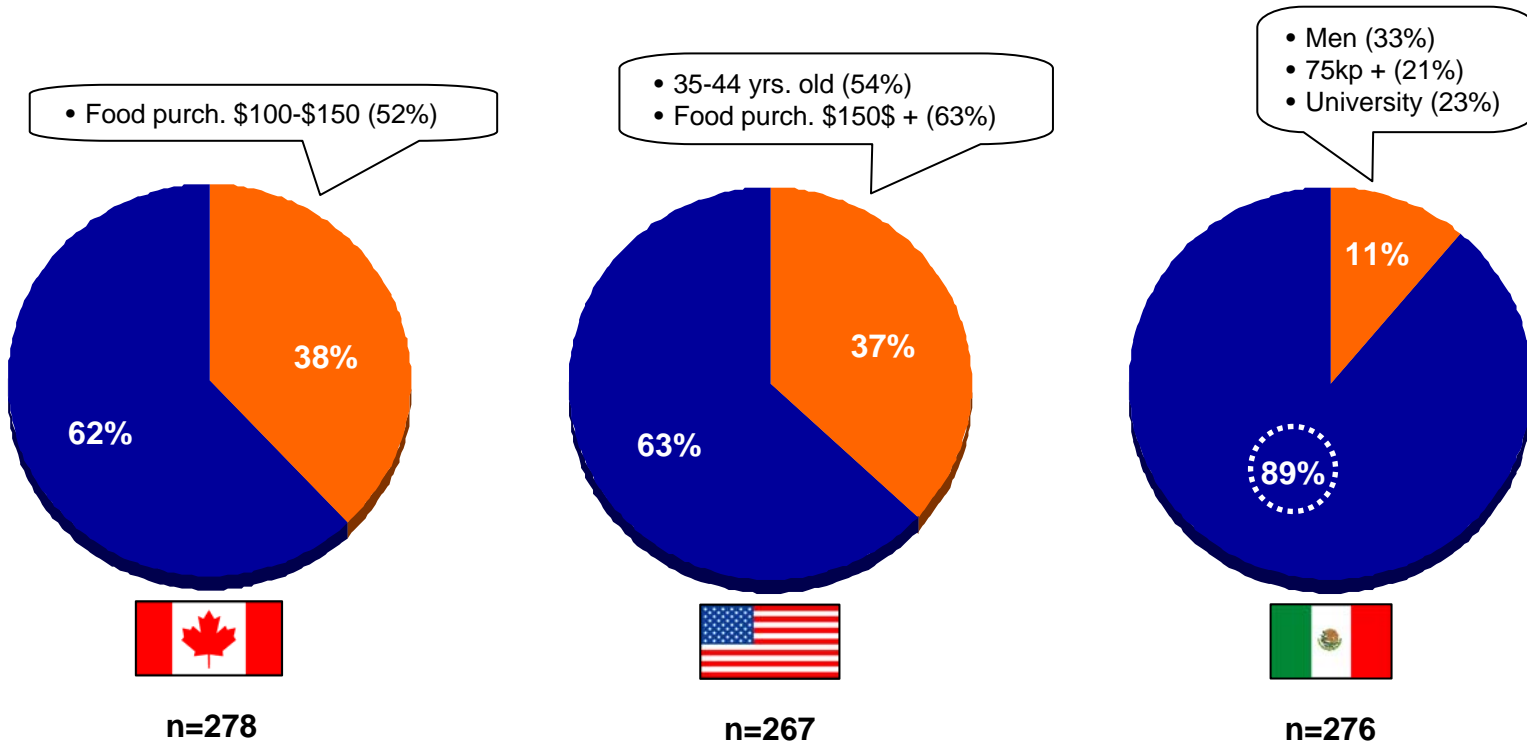
n=276

-  Would consume such products
-  Would not consume such products

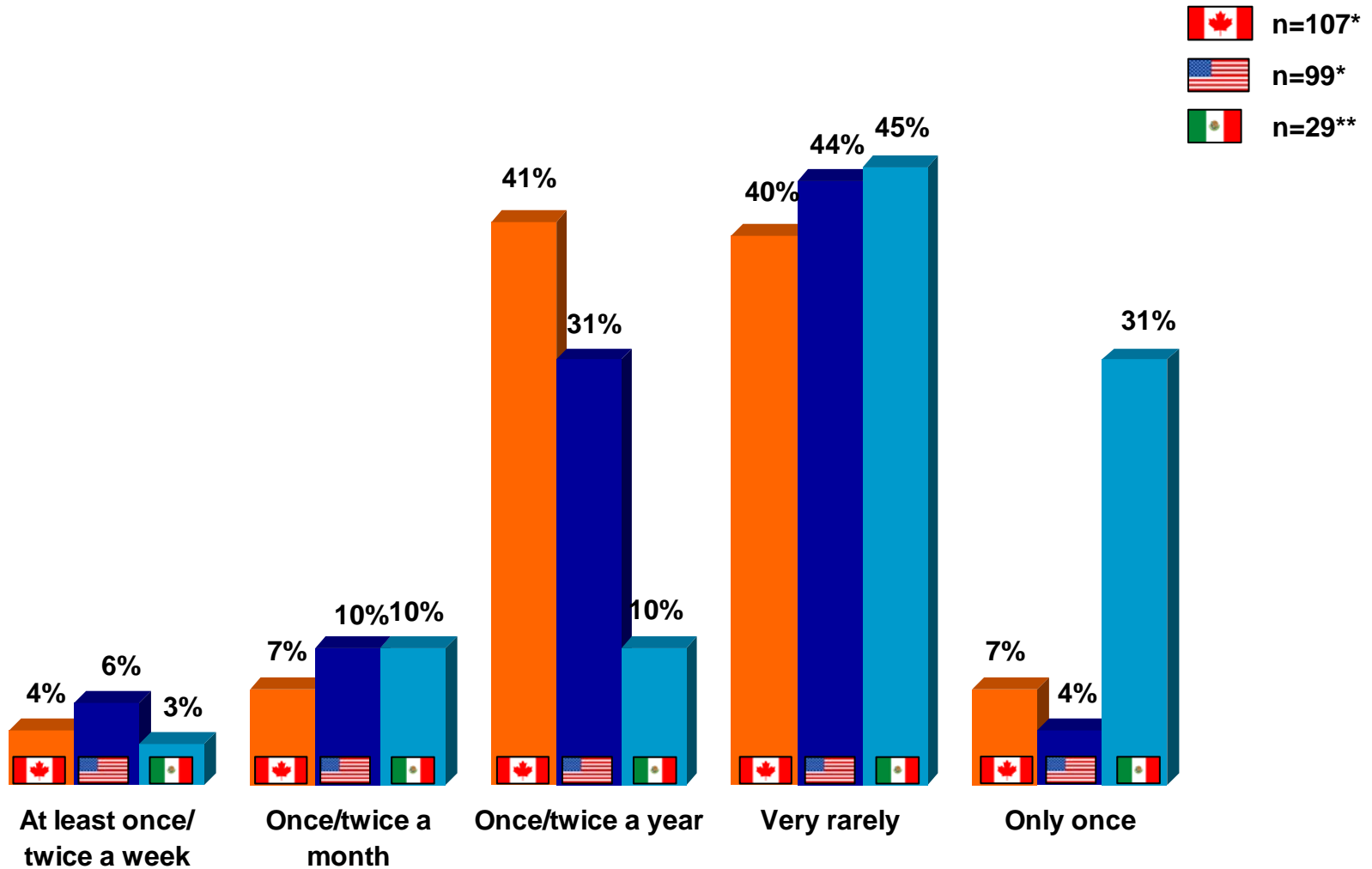




## **Specialty meat consumption habits**



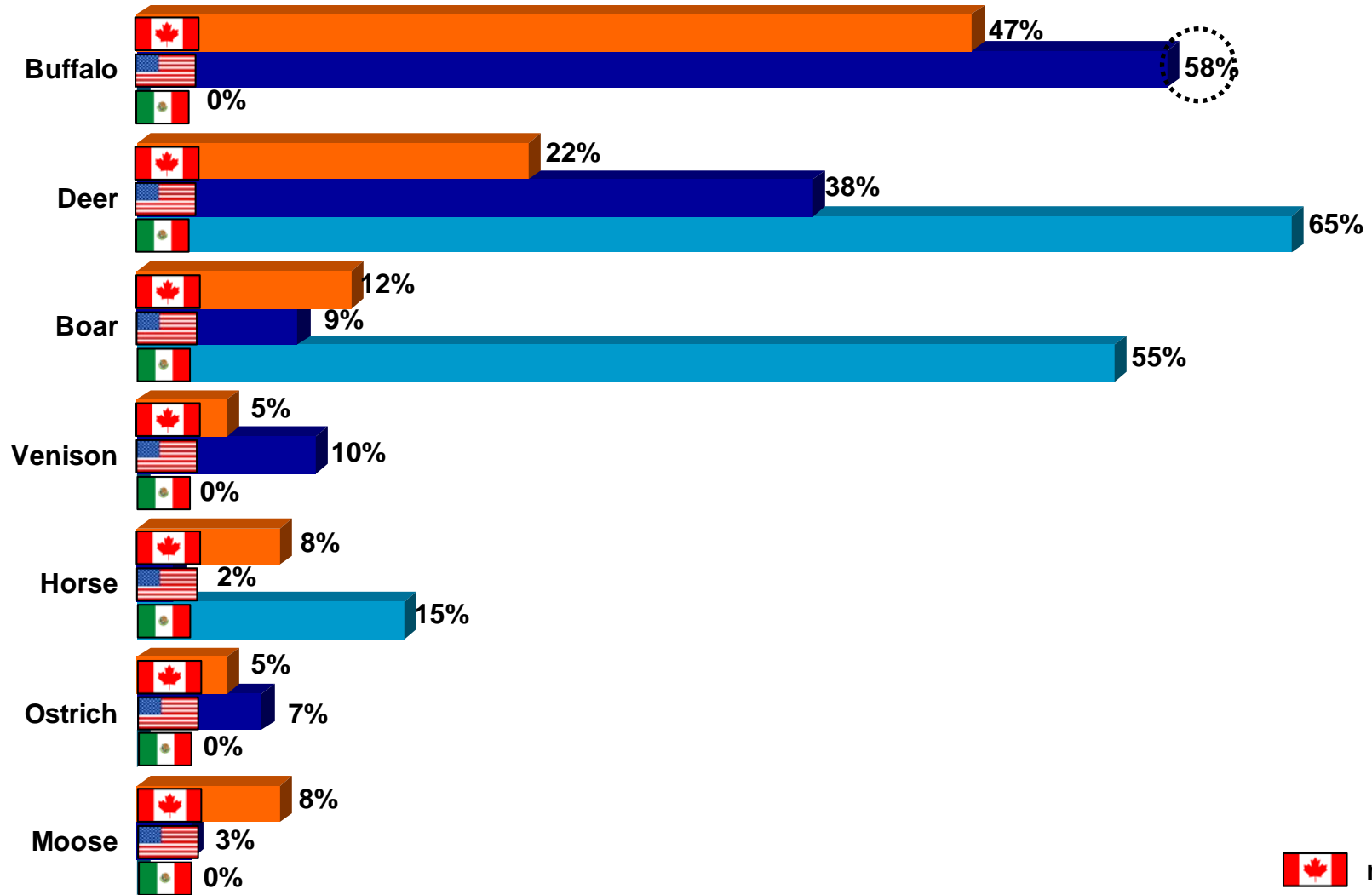
■ Consume or have consumed these products  
■ Do not consume these products



\* Among respondents who have consumed specialty meats

\*\* Results from Mexico are not significant (n<30)





 n=99\*

 n=91\*

 n=20\*

\* Among respondents who have consumed specialty meats more than once

\*\* Several possible answers

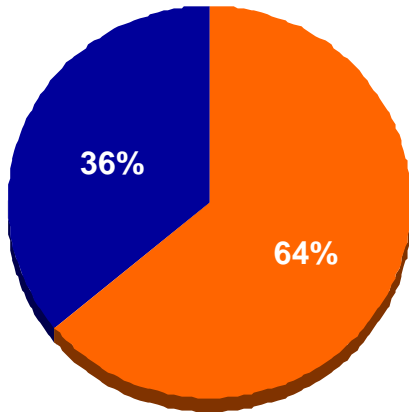
\*\*\* Results from Mexico are not significant (n<30)



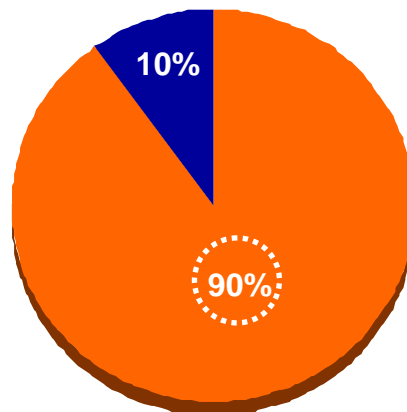
**Bison meat**



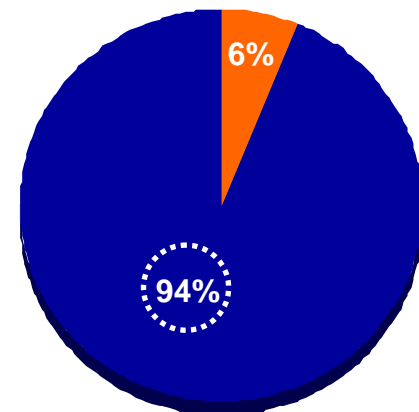
## **Awareness and consumption habits**



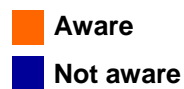
n=231\*



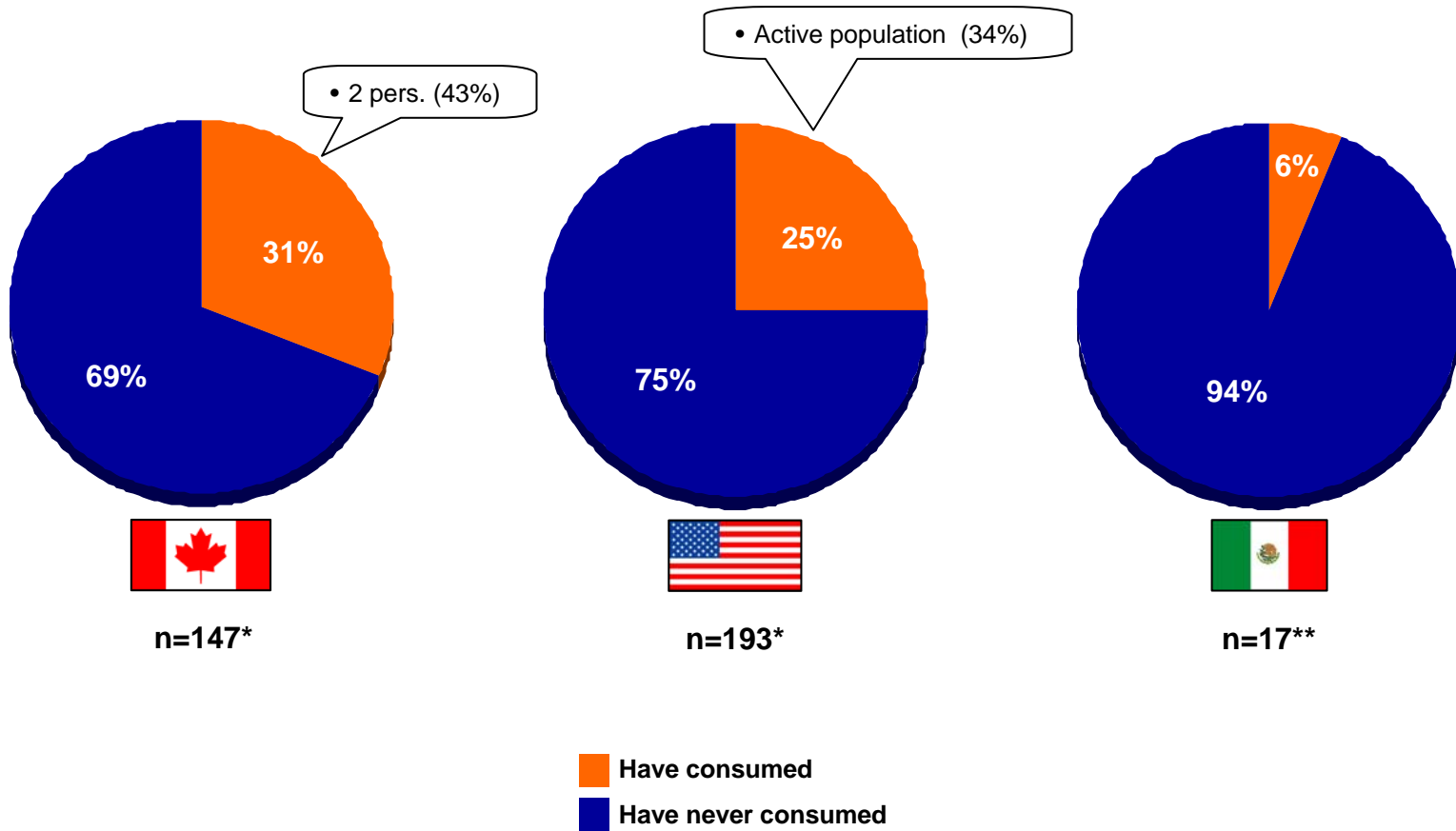
n=214\*



n=276\*

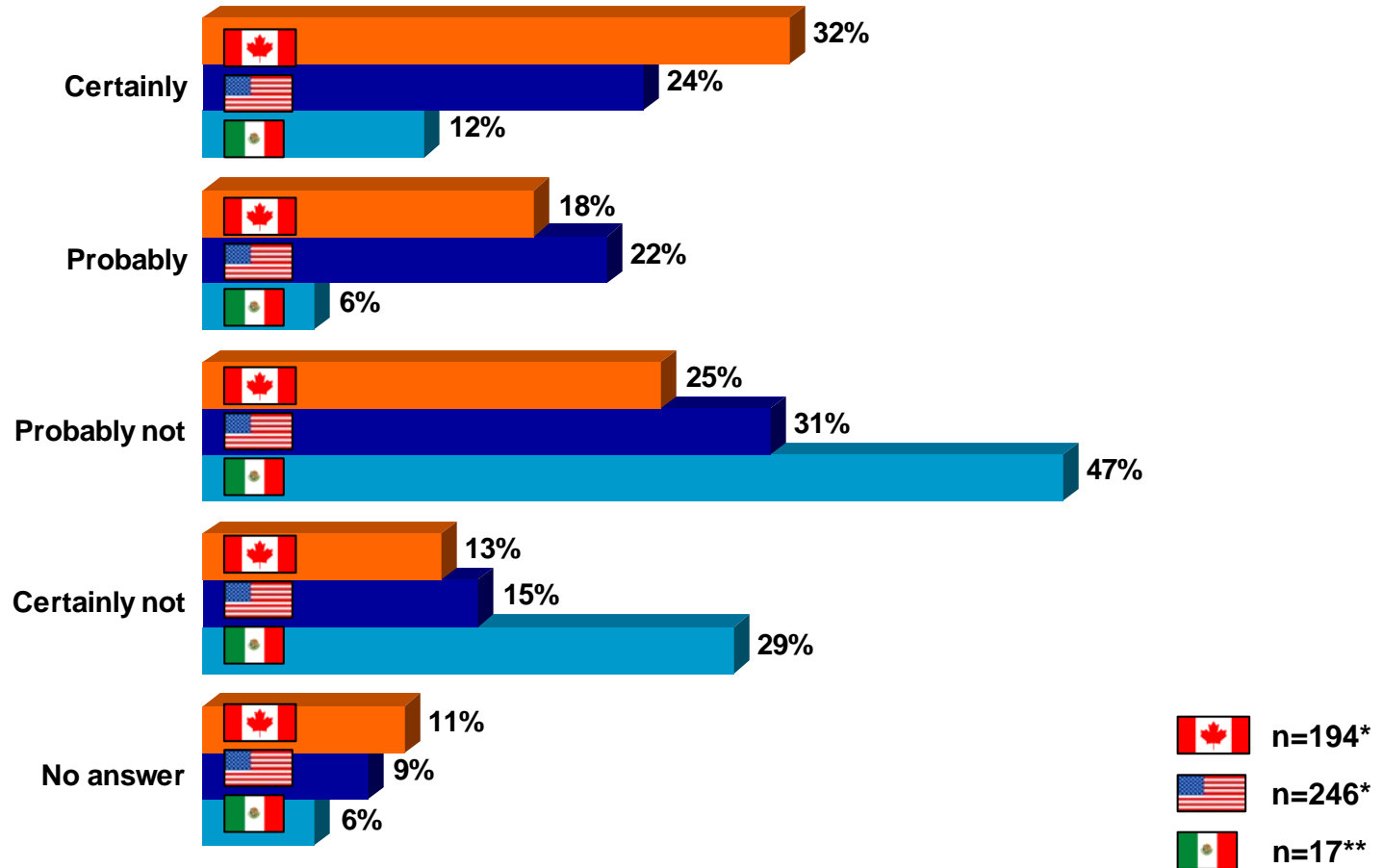


\* Among respondents who do not mention bison in the types of specialty meats they consume



\* Among respondents who know about bison meat

\*\* Results from Mexico are not significant (n<30)



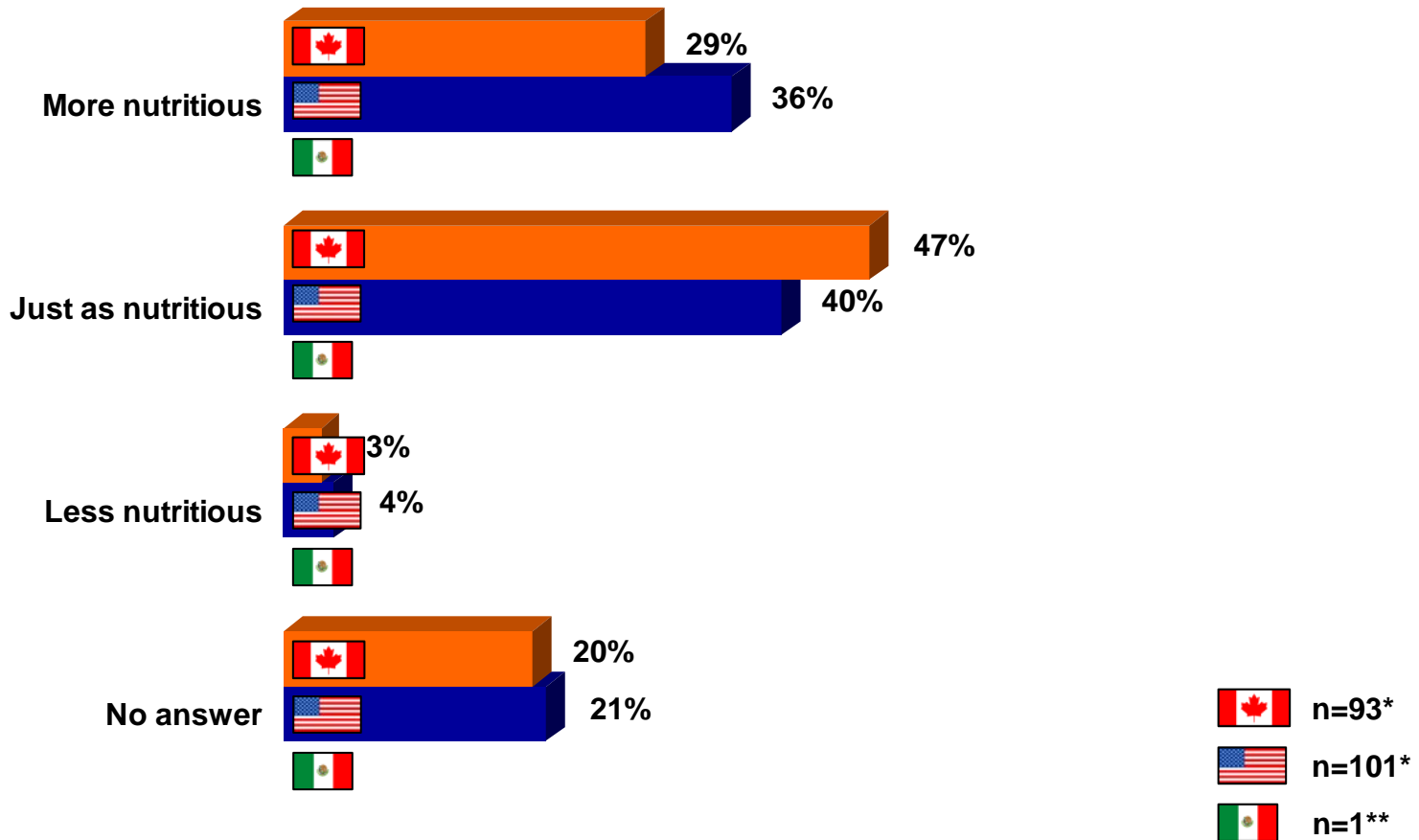
\* Among respondents who have consumed or know about bison meat

\*\* Results from Mexico are not significant (n<30)



## **Comparing bison meat to traditional meats**

## A – Nutritional Value

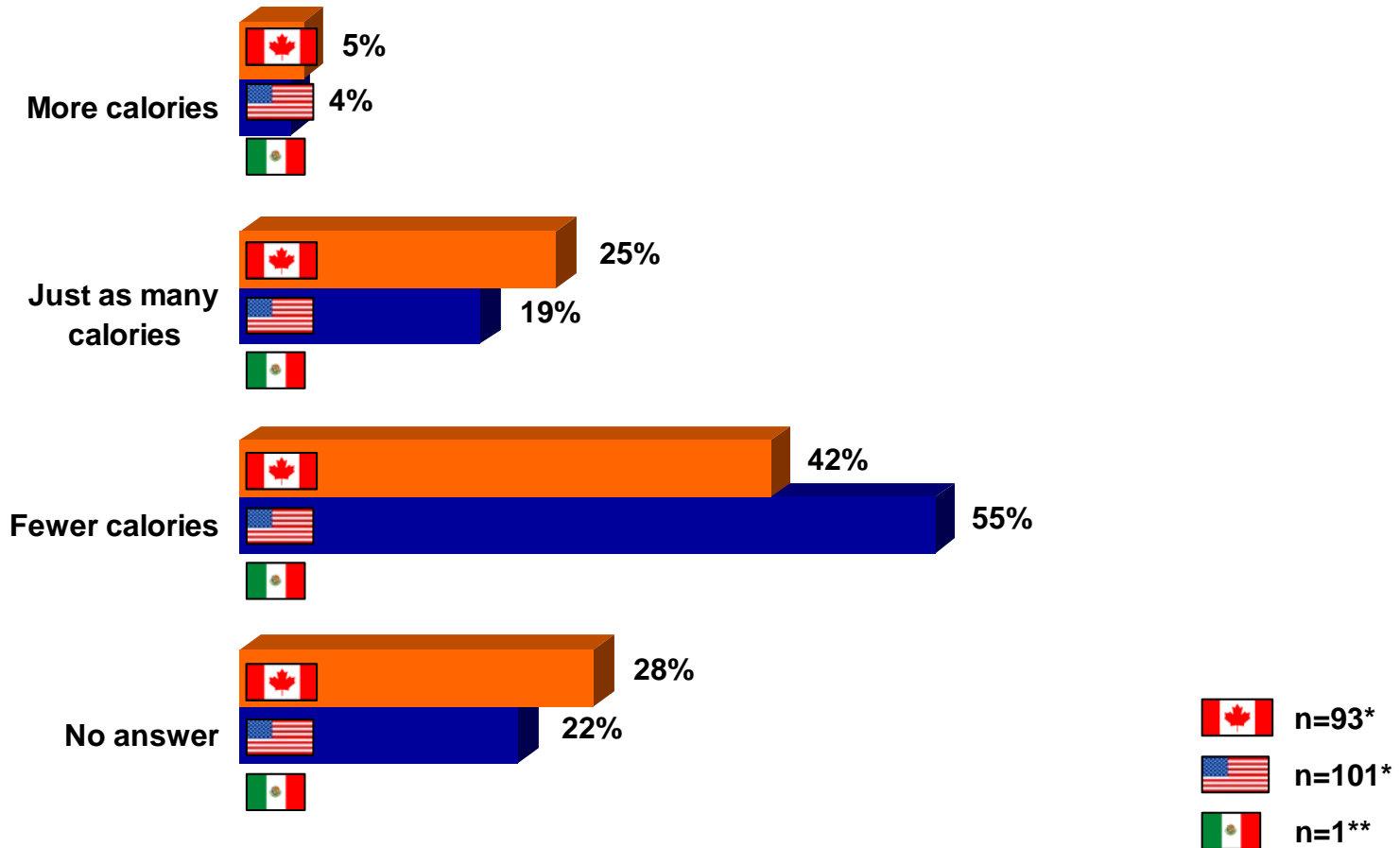


\* Among respondents who have consumed bison meat

\*\* Results from Mexico are not significant (n<30)



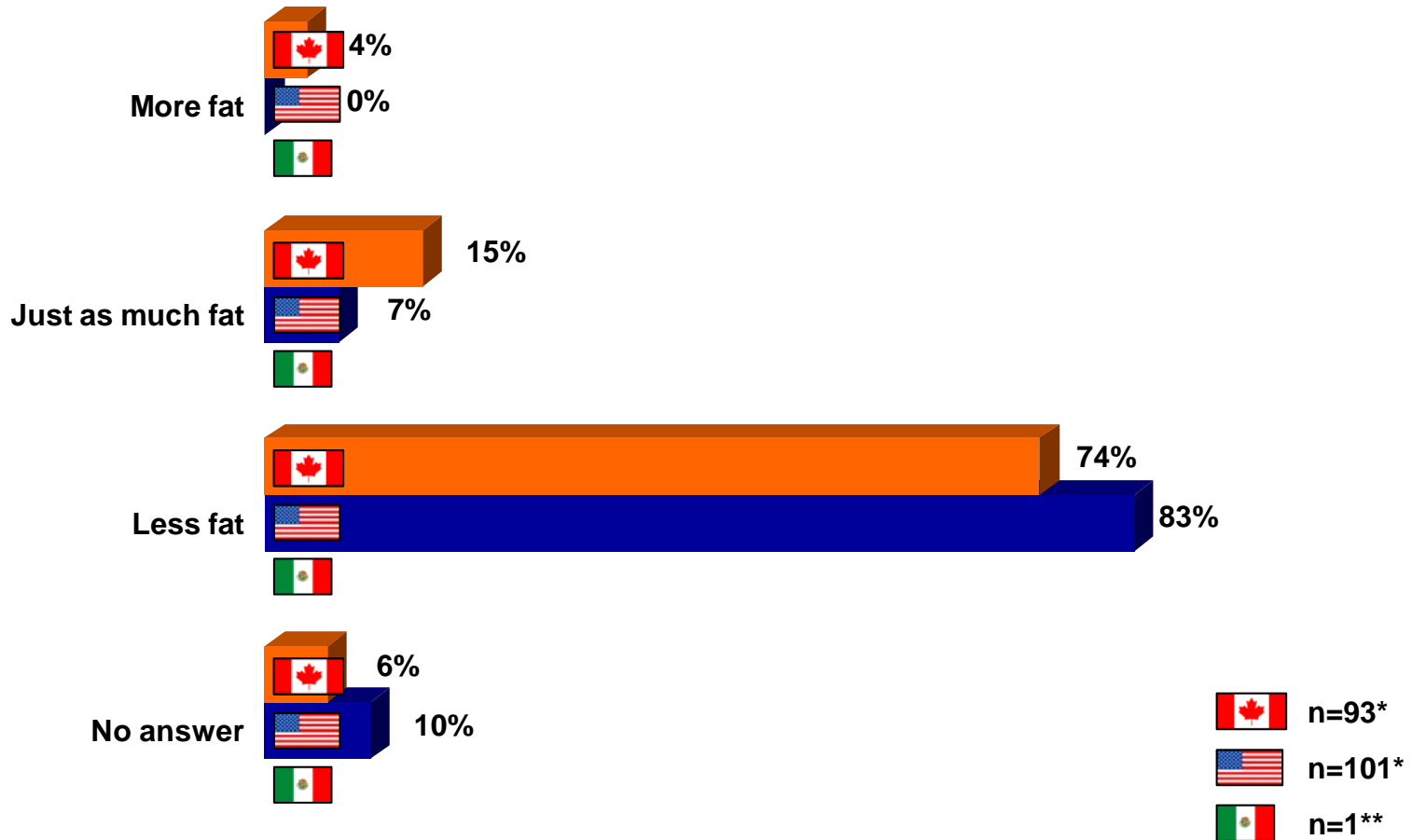
## B – Calorie Content



\* Among respondents who have consumed bison meat

\*\* Results from Mexico are not significant (n<30)

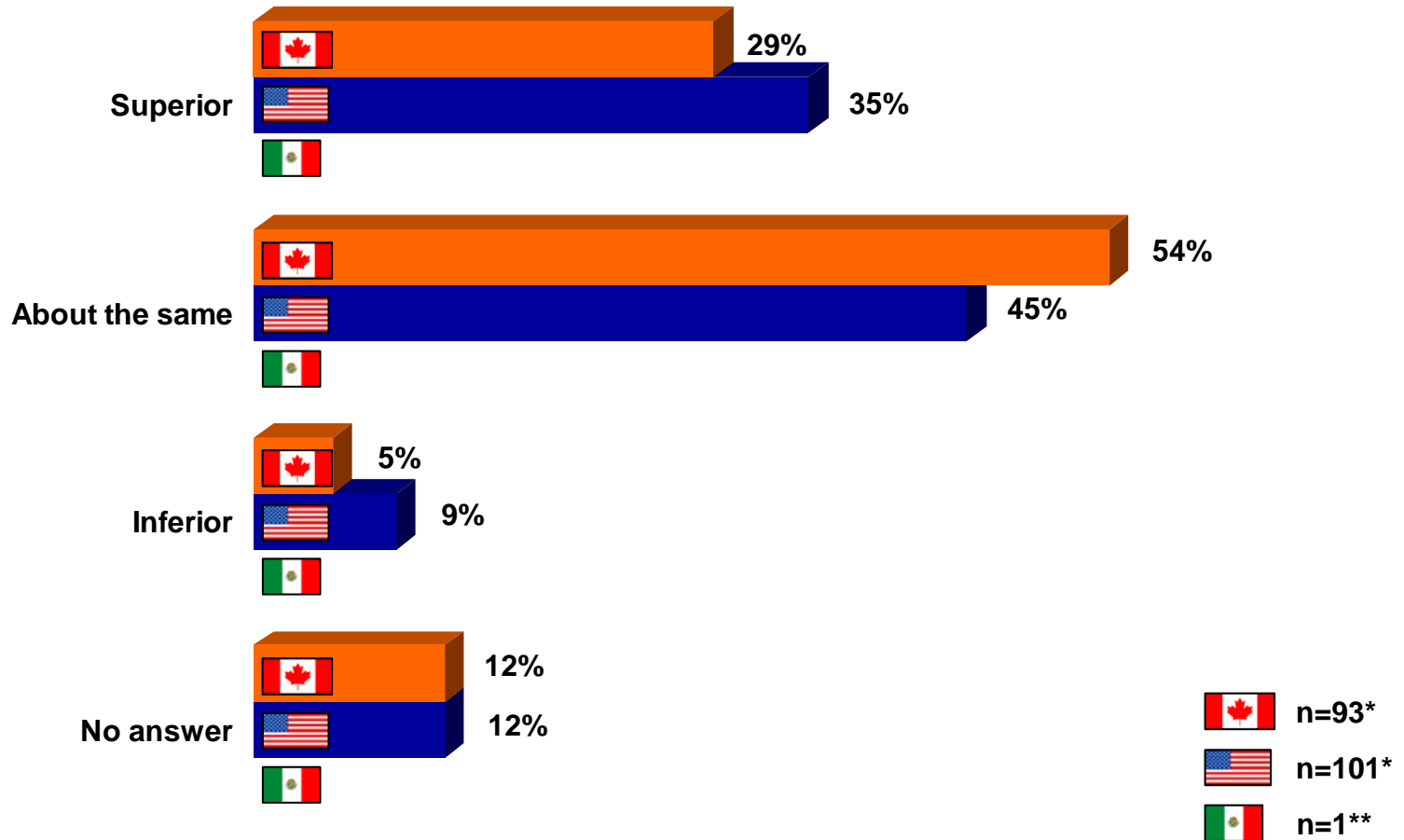
## C – Fat content



\* Among respondents who have consumed bison meat

\*\* Results from Mexico are not significant (n<30)

## D – Quality



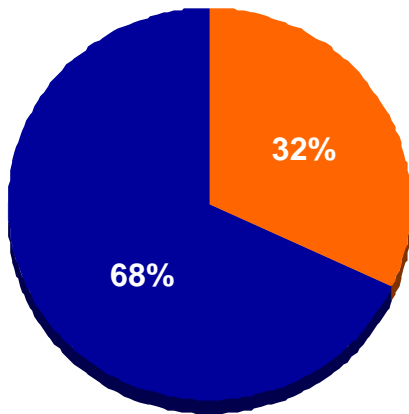
\* Among respondents who have consumed bison meat

\*\* Results from Mexico are not significant (n<30)

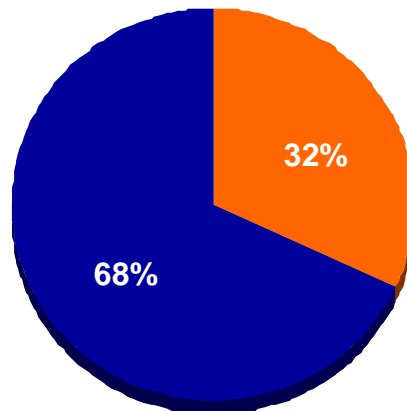


## **Sociodemographic profiles**

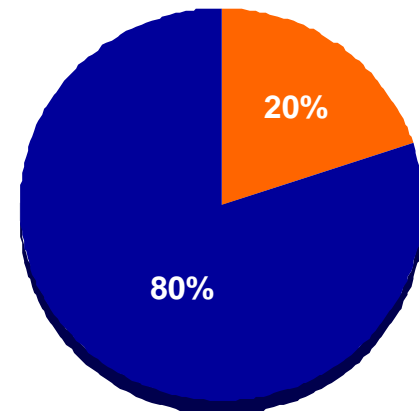
## Gender



n=301



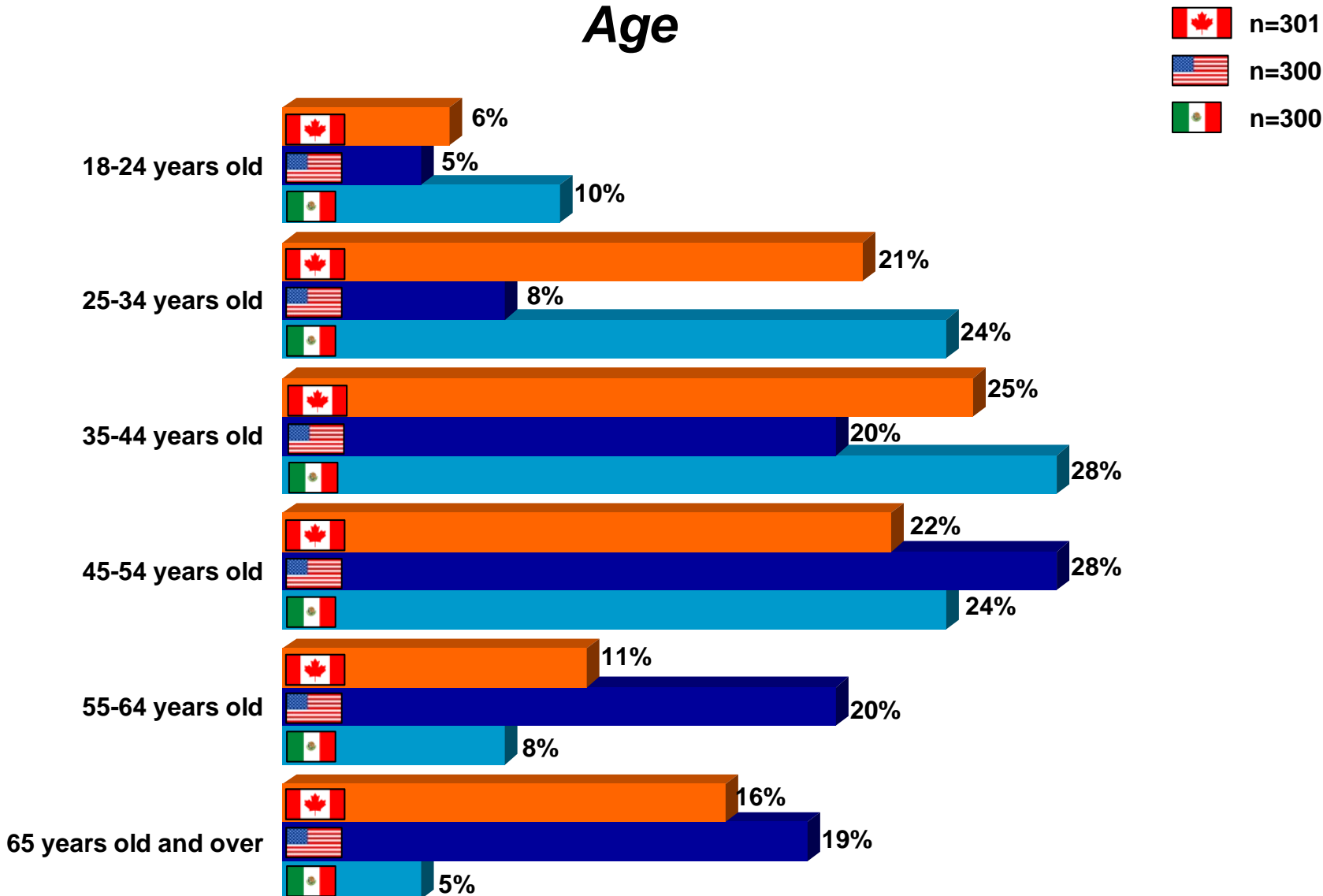
n=300



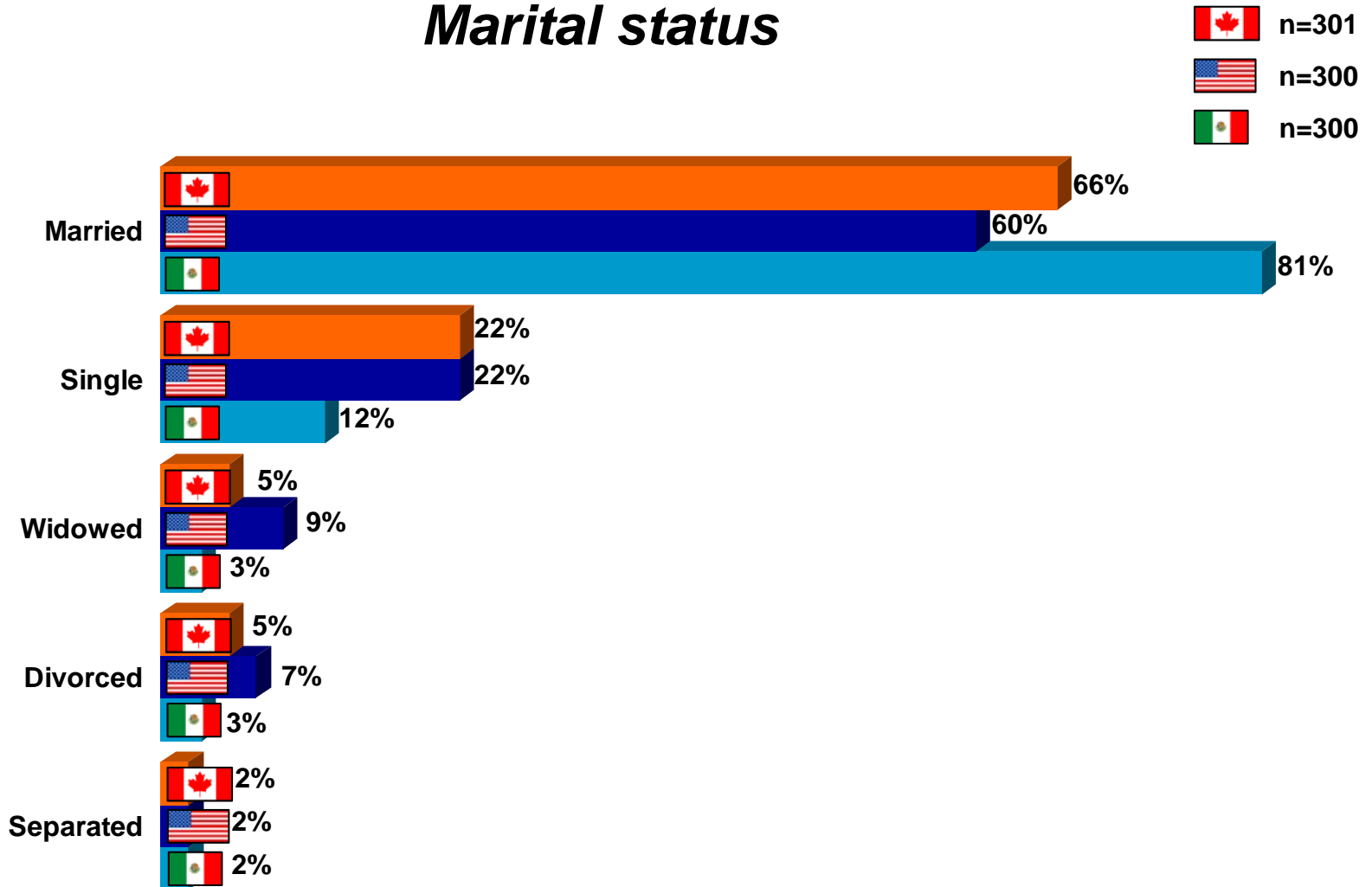
n=300



## Age

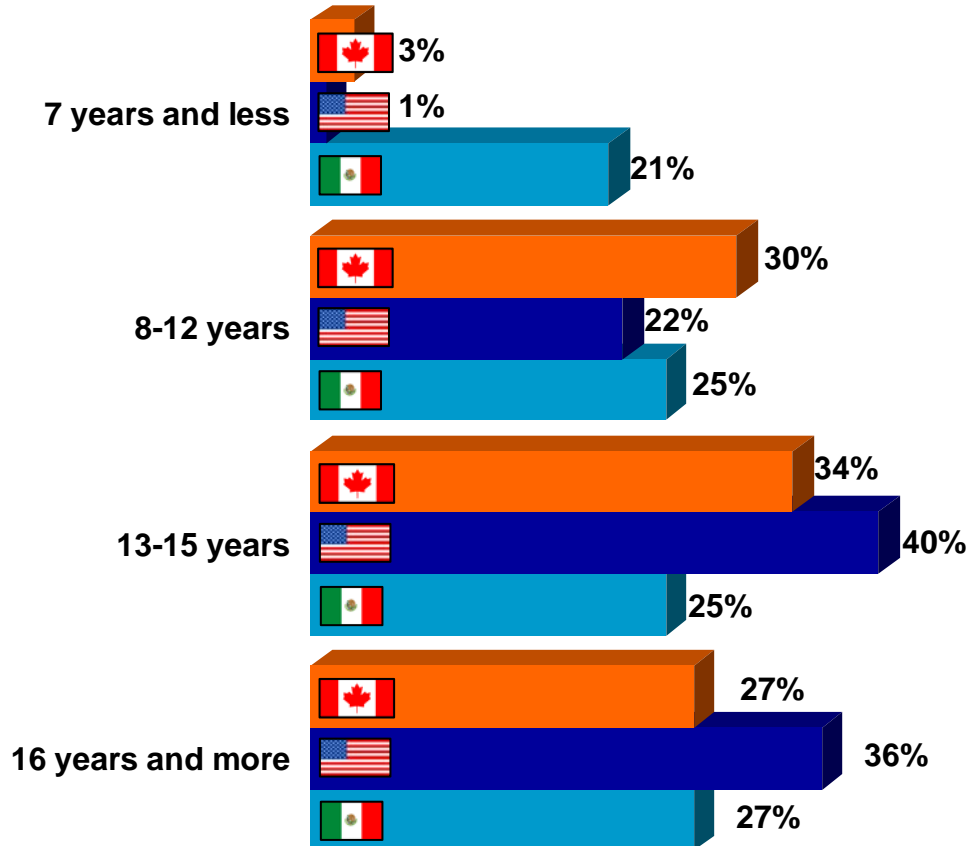


## Marital status



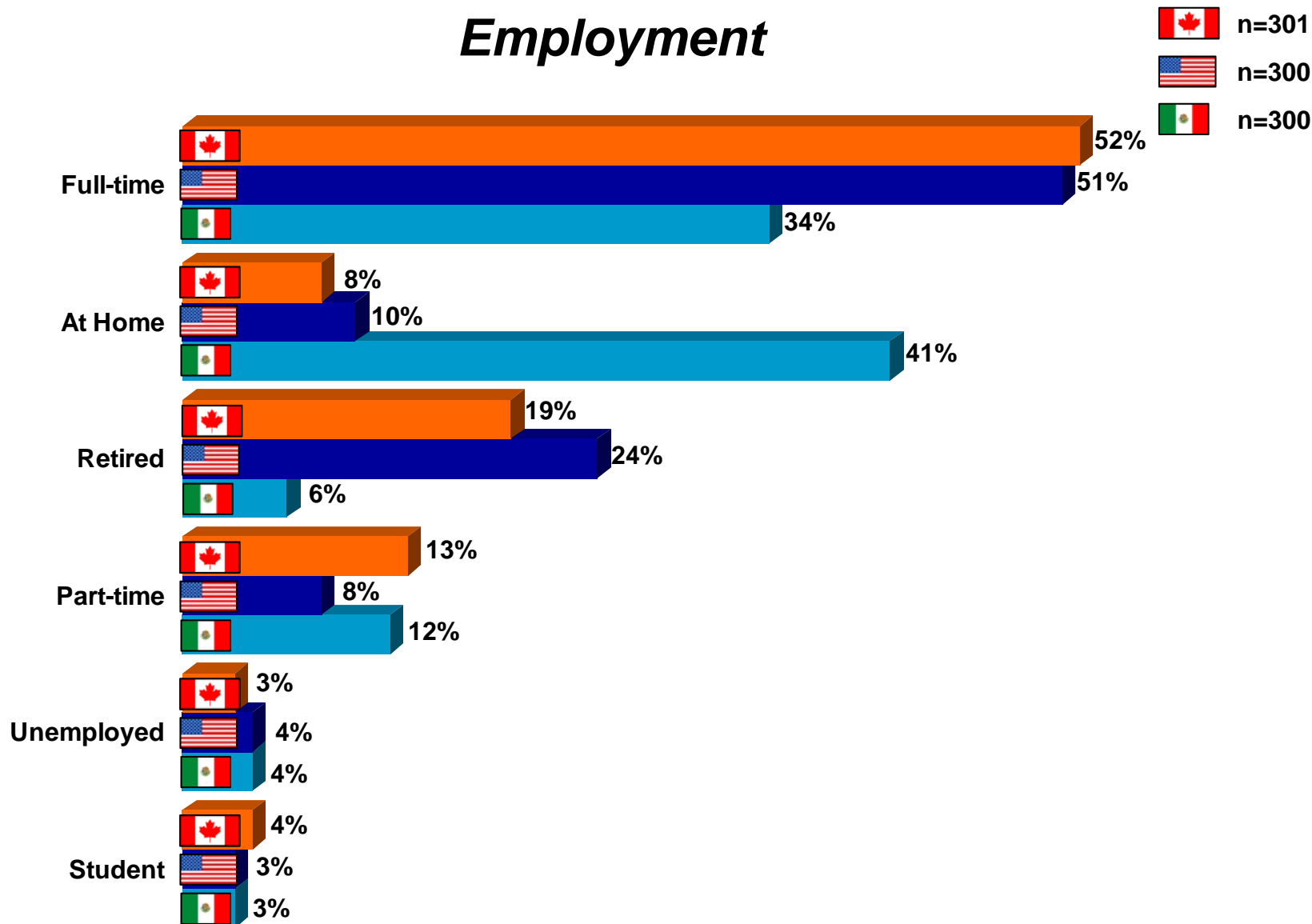
 n=301  
 n=300  
 n=300

## Education



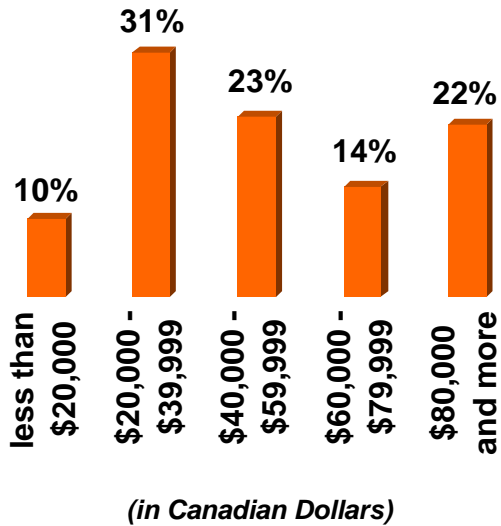


## Employment

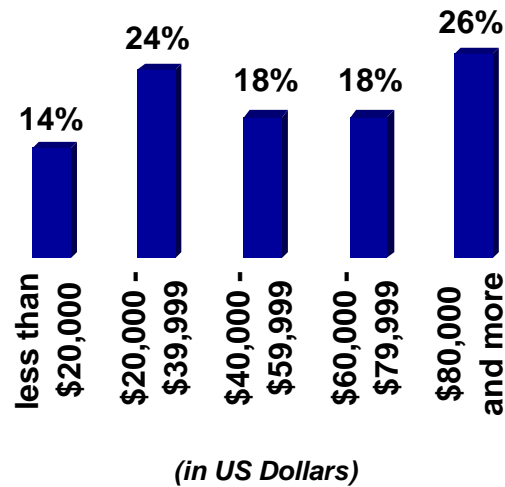


## Income

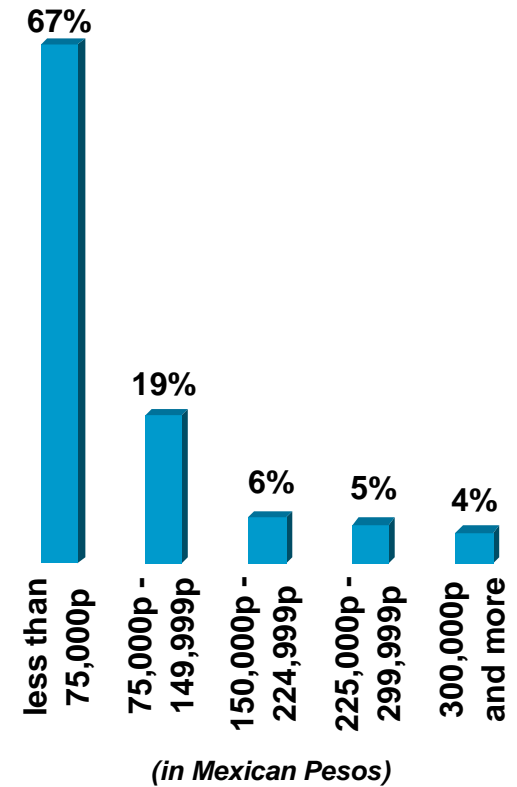
 n=222\*



 n=238\*



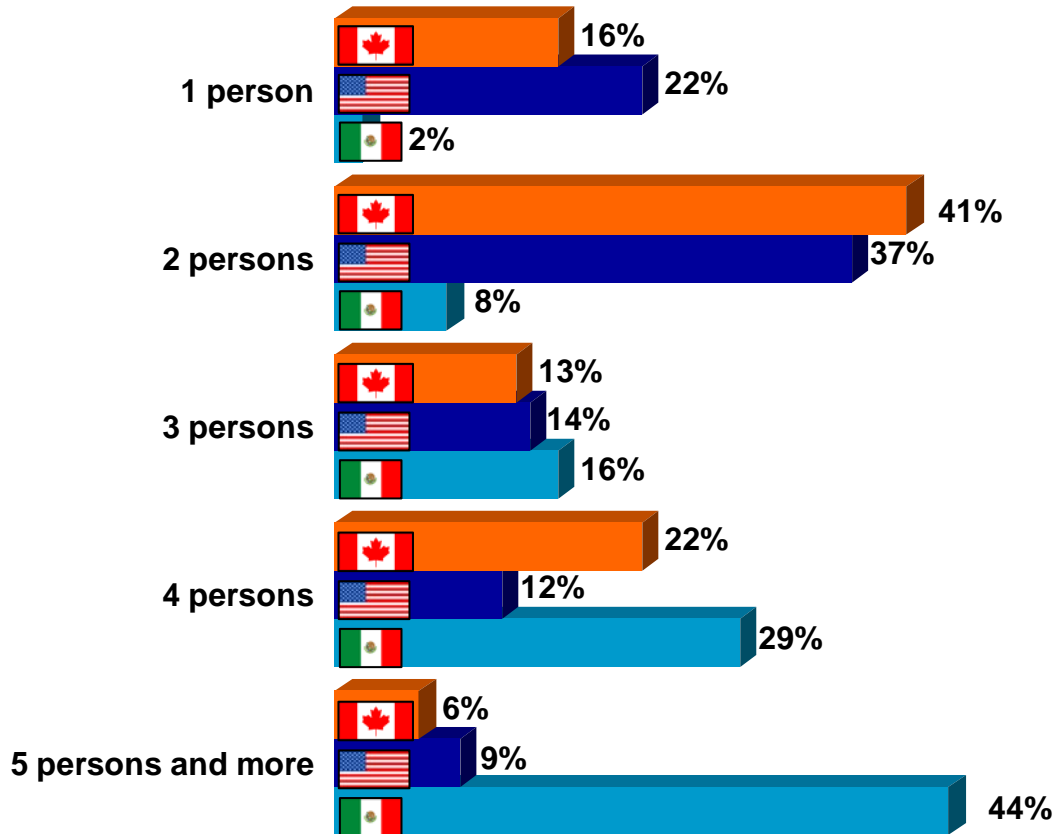
 n=162\*



\* Among respondents who submitted an answer

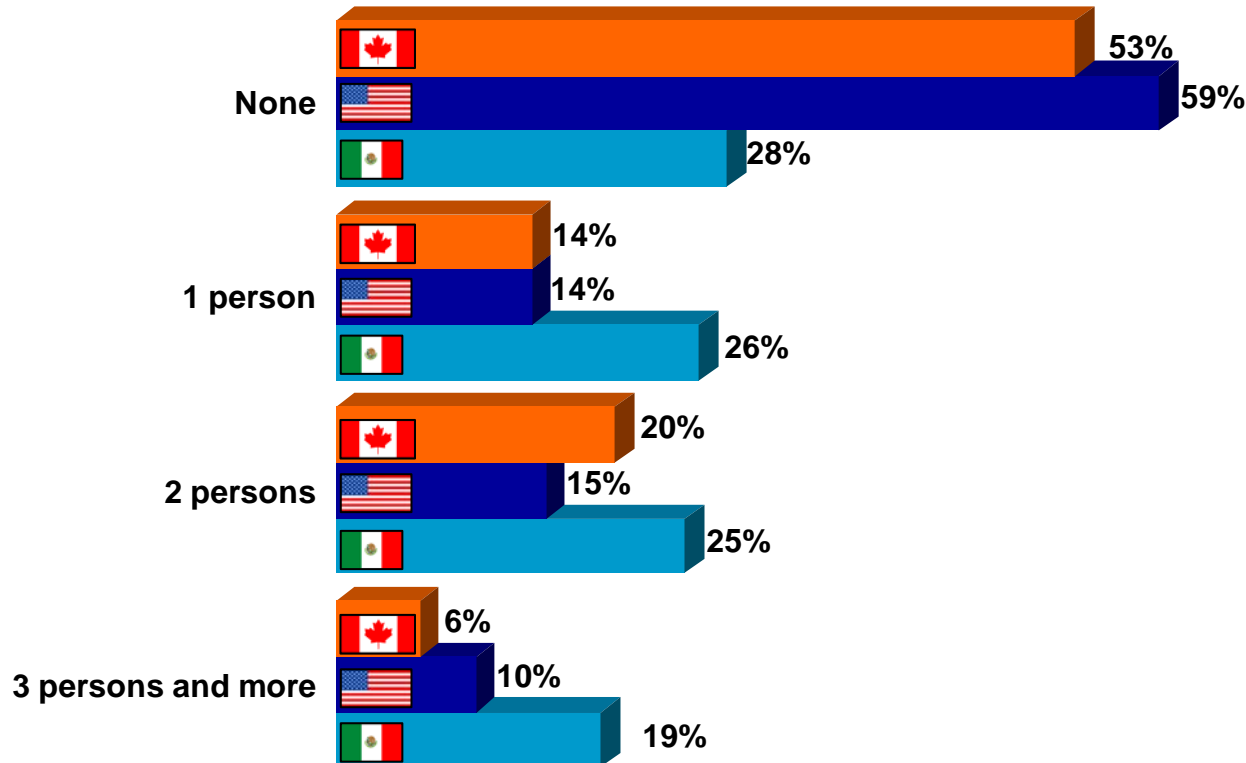
## *Number of individuals in the household*

 n=301  
 n=300  
 n=300



## Number of minor children in the household

 n=254\*  
 n=233\*  
 n=295\*



\* Among households of 2 people or more

\*\* In the United States, a minor child is a person aged 21 or under

\*\* In Canada and Mexico, a minor child is a person aged 18 or under



## **Appendix:** [Questionnaire](http://www.cec.org/pubs_docs/documents/index.cfm?varlan=english&ID=1695)

[http://www.cec.org/pubs\\_docs/documents/index.cfm?varlan=english&ID=1695](http://www.cec.org/pubs_docs/documents/index.cfm?varlan=english&ID=1695)