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Consumer Acceptance: Frozen Meat Research Design

Presented by PAUL KAHN

Describes store sales tests of frozen versus fresh meats and presents a list of questions to be answered from the study, which will provide management with a reliable data base upon which to make decisions.

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Freezing meat, whether at the packer or at the retail level, is just around the corner according to the meat industry leaders.

In 1955 at a major meat industry conference, authorities predicted that by 1960, most retail meat cuts would be frozen. In 1960 the magic date became 1965. Every year or so, some company cautiously tackles the problem of bringing frozen meats to the consumer.

A large retail chain introduced frozen meat in three of their 300 some odd stores and then watched meat sales decrease and their customers go down the block to their competition.

A major packer distributed frozen meat to a half dozen stores in a small city. New freezer cases were installed, new packages developed and exotic names given to the frozen cuts — Norfolk roast, Denver cut, Boston round, Miami roll, until the housewife wondered whether she was buying meat or getting a geography lesson.

And attempts are still being made because it makes economic sense and every meat man knows that the consumer freezes a great portion of the meat she buys and they, logically, reassure each other that the next step has to be — purchase of meat already frozen. And they keep reassuring each other as they watch their wives go to the store, pick-up the frozen meat, examine it and then march over to the meat counter and buy the fresh product, take it home and freeze it.

Why? What motivates this consumer reluctance to try frozen meat?

In the past, partial, though well meaning, research efforts had been undertaken to solve the enigma of the consumer's seemingly irrational behavior. However, partial attempts can provide only incomplete answers — interesting esoterica — that provoke more questions and controversy than they can supply results that are actionable.

Kansas State University, with its Frozen Meat Consumer Study, objectively and painstakingly sought to provide answers upon which the meat industry could take action.

They began with, what on the surface appears to be, a relatively simple statement of purpose: To evaluate consumer reaction to frozen versus fresh meat in a real world situation.

But how do you achieve a real world situation in a controlled market research experiment? You provide the real world — the real world of the supermarkets in which the housewife buys her food twice a week or more often and the kitchen in which she prepares her meals. To supply this environment — a microcosm of the universe — KSU solicited and received the cooperation of both a supermarket chain and a convenience store chain in which to conduct this survey.

Two pairs of test and control supermarkets and four convenience stores were matched for weekly sales volume and the study continued in the convenience stores and one set of supermarkets for 12 weeks and 7 weeks in the other pair of supermarkets.

Twenty-six cuts of frozen meat, identical to available fresh cuts and common to the test stores were displayed for the shopper to buy — or not — and take home to store or prepare in any manner she wished (again, a real world situation). Product nomenclature and price labeling were identical for the fresh and frozen cuts.

The frozen meat was packaged in a transparent film "skin" with a paperboard header. The only initial variable was that a few selected frozen cuts were also available in a high gloss carton. These two packaging methods represented extremes in product visibility. To insure that the standards for the 26 frozen and fresh cuts were maintained, the cutting, trimming and packaging were supervised throughout the test.

To further simulate actual market place conditions, the study was designed to compare sales volume when the frozen product was priced equal to, greater than and less than its fresh counterpart.

A consumer panel of 471 homemakers was recruited. To qualify for the panel, women had to be regular meat purchasers at the specific test markets.

The panel housewives filled out a daily diary of their purchases, not only meat, but frozen foods, groceries, produce, dairy products, for the duration of the study. All her daily purchases were checked off on the diary as she unpacked them at home. This directed the emphasis away from the main purpose of the survey. It was only during the final interview that the respondent became aware that the survey was primarily con-

cerned with meat evaluation. In addition to the diary, each respondent was interviewed at the start and conclusion of the survey and contacted during the test period. In all, six different questionnaires were administered which provided a total of 25,000 computer cards.

This was in addition to a complete store audit that included price of other meat products, sales distribution among different cuts, merchandising and display space allocations, impact of competing stores.

Time does not permit me to detail the staggering amount of data that the KSU study amassed. A sample of the areas of inquiry included:

1. How does a consumer judge the meat she buys?
2. How important to a purchase decision are specific meat characteristics such as color, trim, weight, price?
3. What was the first impression of frozen meat when seen in the freezer case?
4. What motivated initial purchase?
5. What expectations did the homemaker have?
6. What were the purchase deterrents among housewives who did not buy frozen meat?
7. Why was she unwilling to try the product?
8. Did continued exposure to the product stimulate purchase?
9. At what point or week of the test did she make her first purchase?
10. What percent of purchase was impulse buying?
11. Did she repurchase the same cut? A different cut? How frequently? Are certain cuts more acceptable in the frozen state than others?
12. What did she do with the product when she got it home?
13. What was the consumer's reaction to the frozen product relative to its handling, storage, preparation, taste, texture, juiciness?
14. Did she prepare it from the frozen state or thaw it? Why?
15. How did the frozen compare to fresh for handling, storage, preparation, taste, texture, juiciness?
16. What in-home use difficulties were encountered?
17. What were the advantages and disadvantages of buying frozen meat?
18. Was she aware of two package styles?
19. Which style was preferred? Why?
20. In what areas did the frozen meat fail to measure up to consumer expectations?
21. What was the effect of price in the purchase situation?
22. What differences could be drawn from the demographic data?
23. Are younger women more willing to try the frozen product than are the older housewives?
24. Is there a different purchase pattern between working and non-working women?
25. Is the infrequent shopper more apt to buy the frozen meat than is the woman who shops daily or every other day?

These were only a few of the avenues explored in attempting to evaluate consumer reaction to frozen vs. fresh meat in a real world situation.

Once the gargantuan task of assembling the bits and pieces of data has been performed and the findings analyzed, answers will be available pertinent to almost every management facet in the meat industry: a) Meat cutting b) Distribution c) Marketing d) Merchandising e) Packaging f) Promotion g) Quality control.

The support function of marketing research will have been realized: To provide management with reliable data upon which meaningful (actionable) decisions can be based.