

Ground Beef Demand Impact Survey


1. Please rank these 7 broad factors in terms of their impact (positive or negative) on per capita ground beef consumption in the U.S over the next 10 years?

	1 (most impact)	2	3	4	5	6	7 (least impact)	Rating Average	Rating Count
Price (price per pound paid by consumer)	70.7% (29)	22.0% (9)	2.4% (1)	2.4% (1)	2.4% (1)	0.0% (0)	0.0% (0)	1.44	41
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	12.2% (5)	41.5% (17)	7.3% (3)	17.1% (7)	9.8% (4)	7.3% (3)	4.9% (2)	3.12	41
Nutrition (protein, vitamins, nutrients, etc.)	0.0% (0)	0.0% (0)	12.2% (5)	22.0% (9)	31.7% (13)	19.5% (8)	14.6% (6)	5.02	41
Health (amount and type of fat, cholesterol contribution, etc.)	2.4% (1)	14.6% (6)	22.0% (9)	29.3% (12)	22.0% (9)	4.9% (2)	4.9% (2)	3.88	41
Food Safety (E. coli, Salmonella, BSE, etc.)	14.6% (6)	22.0% (9)	48.8% (20)	7.3% (3)	4.9% (2)	0.0% (0)	2.4% (1)	2.76	41
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	0.0% (0)	0.0% (0)	2.4% (1)	12.2% (5)	12.2% (5)	31.7% (13)	41.5% (17)	5.98	41
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	0.0% (0)	0.0% (0)	4.9% (2)	9.8% (4)	17.1% (7)	36.6% (15)	31.7% (13)	5.80	41
answered question									41
skipped question									1

2. The previous question requested simple ordinal ranking information. We now ask for your opinion on the relative impact of each factor. What percentage of the total impact these 7 factors will have on per capita ground beef consumption in the U.S over the next 10 years do you believe aligns with each factor? For example, if you think a single factor is going to cause 20% of total per capita consumption change that factor would receive a value of 20 – the total should sum to 100.

	Response Average	Response Total	Response Count
Price (price per pound paid by consumer)	34.24	1,404	41
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	15.93	653	41
Nutrition (protein, vitamins, nutrients, etc.)	9.29	381	41
Health (amount and type of fat, cholesterol contribution, etc.)	12.17	499	41
Food Safety (E. coli, Salmonella, BSE, etc.)	16.44	674	41
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	6.44	264	41
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	5.49	225	41
	answered question		41
	skipped question		1

3. What best describes the impact each of these 7 factors will have on per capita ground beef consumption in the U.S. over the next 10 years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Price (price per pound paid by consumer)	22.0% (9)	12.2% (5)	2.4% (1)	43.9% (18)	19.5% (8)	41
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	34.1% (14)	43.9% (18)	17.1% (7)	4.9% (2)	0.0% (0)	41
Nutrition (protein, vitamins, nutrients, etc.)	2.4% (1)	34.1% (14)	43.9% (18)	19.5% (8)	0.0% (0)	41
Health (amount and type of fat, cholesterol contribution, etc.)	2.4% (1)	31.7% (13)	19.5% (8)	41.5% (17)	4.9% (2)	41
Food Safety (E. coli, Salmonella, BSE, etc.)	14.6% (6)	17.1% (7)	17.1% (7)	43.9% (18)	7.3% (3)	41
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	0.0% (0)	17.1% (7)	29.3% (12)	53.7% (22)	0.0% (0)	41
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	0.0% (0)	22.0% (9)	36.6% (15)	39.0% (16)	2.4% (1)	41
				answered question		41
				skipped question		1

4. Please rank these 7 broad factors in terms of feasibility for the industry to influence their impact on per capita ground beef consumption in the U.S over the next 10 years?

	1 (most feasible to influence)	2	3	4	5	6	7 (least feasible to influence)	Rating Average	Ratio
Price (price per pound paid by consumer)	2.6% (1)	5.1% (2)	10.3% (4)	7.7% (3)	23.1% (9)	20.5% (8)	30.8% (12)	5.28	
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	46.2% (18)	33.3% (13)	0.0% (0)	10.3% (4)	7.7% (3)	2.6% (1)	0.0% (0)	2.08	
Nutrition (protein, vitamins, nutrients, etc.)	5.1% (2)	5.1% (2)	20.5% (8)	5.1% (2)	20.5% (8)	17.9% (7)	25.6% (10)	4.87	
Health (amount and type of fat, cholesterol contribution, etc.)	0.0% (0)	7.7% (3)	17.9% (7)	25.6% (10)	12.8% (5)	23.1% (9)	12.8% (5)	4.64	
Food Safety (E. coli, Salmonella, BSE, etc.)	41.0% (16)	41.0% (16)	7.7% (3)	10.3% (4)	0.0% (0)	0.0% (0)	0.0% (0)	1.87	
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	0.0% (0)	5.1% (2)	30.8% (12)	15.4% (6)	17.9% (7)	7.7% (3)	23.1% (9)	4.62	
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	5.1% (2)	2.6% (1)	12.8% (5)	25.6% (10)	17.9% (7)	28.2% (11)	7.7% (3)	4.64	
answered question									
skipped question									

5. What best describes the feasibility (keeping your overall perspective of scientific advancement, economic aspects, industry adoption, and social impacts) of the beef industry influencing each of these 7 broad factors in relation to their potential impact on per capita ground beef consumption in the U.S. over the next 10 years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Price (price per pound paid by consumer)	7.7% (3)	30.8% (12)	20.5% (8)	25.6% (10)	15.4% (6)	39
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	33.3% (13)	61.5% (24)	0.0% (0)	2.6% (1)	2.6% (1)	39
Nutrition (protein, vitamins, nutrients, etc.)	2.6% (1)	43.6% (17)	23.1% (9)	28.2% (11)	2.6% (1)	39
Health (amount and type of fat, cholesterol contribution, etc.)	17.9% (7)	43.6% (17)	20.5% (8)	12.8% (5)	5.1% (2)	39
Food Safety (E. coli, Salmonella, BSE, etc.)	46.2% (18)	51.3% (20)	2.6% (1)	0.0% (0)	0.0% (0)	39
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	12.8% (5)	46.2% (18)	15.4% (6)	15.4% (6)	10.3% (4)	39
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	10.3% (4)	51.3% (20)	20.5% (8)	12.8% (5)	5.1% (2)	39
				answered question		39
				skipped question		3

6. Thinking about nutrition only, what impact do you expect each of these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Protein content	25.6% (10)	56.4% (22)	17.9% (7)	0.0% (0)	0.0% (0)	39
Iron content	12.8% (5)	56.4% (22)	30.8% (12)	0.0% (0)	0.0% (0)	39
Zinc content	2.6% (1)	38.5% (15)	59.0% (23)	0.0% (0)	0.0% (0)	39
Carbohydrate content	12.8% (5)	12.8% (5)	59.0% (23)	12.8% (5)	2.6% (1)	39
Content of other nutrients	2.6% (1)	30.8% (12)	59.0% (23)	7.7% (3)	0.0% (0)	39
answered question						39
skipped question						3

7. Thinking about product quality and form only, what impact do you expect each of these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Taste	48.7% (19)	30.8% (12)	17.9% (7)	2.6% (1)	0.0% (0)	39
Juiciness	23.1% (9)	35.9% (14)	41.0% (16)	0.0% (0)	0.0% (0)	39
Consistency	33.3% (13)	46.2% (18)	17.9% (7)	2.6% (1)	0.0% (0)	39
Package/Portion size	33.3% (13)	33.3% (13)	28.2% (11)	5.1% (2)	0.0% (0)	39
Color/appearance	33.3% (13)	43.6% (17)	23.1% (9)	0.0% (0)	0.0% (0)	39
Freshness/shelf life	48.7% (19)	28.2% (11)	15.4% (6)	7.7% (3)	0.0% (0)	39
Preparation ease/convenience	51.3% (20)	41.0% (16)	5.1% (2)	2.6% (1)	0.0% (0)	39
answered question						39
skipped question						3

8. Thinking about health only, what impact do you expect each of these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Amount of fat	5.1% (2)	17.9% (7)	17.9% (7)	48.7% (19)	10.3% (4)	39
Type of fat	5.1% (2)	17.9% (7)	28.2% (11)	43.6% (17)	5.1% (2)	39
Cholesterol contribution	5.1% (2)	2.6% (1)	20.5% (8)	61.5% (24)	10.3% (4)	39
Arteriosclerosis (“heart disease”) impact	7.7% (3)	5.1% (2)	20.5% (8)	56.4% (22)	10.3% (4)	39
Carcinogenic concerns	2.6% (1)	5.1% (2)	43.6% (17)	38.5% (15)	10.3% (4)	39
Sodium content	5.1% (2)	15.4% (6)	46.2% (18)	33.3% (13)	0.0% (0)	39
Calorie content	7.7% (3)	12.8% (5)	41.0% (16)	38.5% (15)	0.0% (0)	39
answered question						39
skipped question						3

9. Thinking about food safety only, what impact do you expect each of these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
E. coli	5.1% (2)	7.7% (3)	7.7% (3)	43.6% (17)	35.9% (14)	39
Salmonella	5.1% (2)	7.7% (3)	15.4% (6)	48.7% (19)	23.1% (9)	39
Listeria	2.6% (1)	5.1% (2)	30.8% (12)	48.7% (19)	12.8% (5)	39
Campylobacter	5.1% (2)	2.6% (1)	46.2% (18)	38.5% (15)	7.7% (3)	39
Bovine Spongiform Encephalopathy (BSE)	2.6% (1)	0.0% (0)	56.4% (22)	25.6% (10)	15.4% (6)	39
answered question						39
skipped question						3






10. Thinking about social aspects only, what impact do you expect each of these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Animal welfare	2.6% (1)	28.2% (11)	25.6% (10)	43.6% (17)	0.0% (0)	39
Produced on a small farm	7.7% (3)	61.5% (24)	30.8% (12)	0.0% (0)	0.0% (0)	39
Locally produced	10.3% (4)	61.5% (24)	28.2% (11)	0.0% (0)	0.0% (0)	39
Country of origin labeled	2.6% (1)	17.9% (7)	69.2% (27)	10.3% (4)	0.0% (0)	39
Cloning practices	2.6% (1)	2.6% (1)	30.8% (12)	56.4% (22)	7.7% (3)	39
Naturally or organically produced	15.4% (6)	66.7% (26)	17.9% (7)	0.0% (0)	0.0% (0)	39
Use of antibiotics in cattle production	0.0% (0)	5.1% (2)	20.5% (8)	51.3% (20)	23.1% (9)	39
Use of synthetic growth promotants / beta agonists in cattle production	0.0% (0)	10.3% (4)	12.8% (5)	53.8% (21)	23.1% (9)	39
answered question						39
skipped question						3


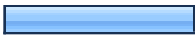

11. Thinking about sustainability only, what impact do you expect each of these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Impact of beef industry on environment	0.0% (0)	20.5% (8)	28.2% (11)	46.2% (18)	5.1% (2)	39
Impact of beef industry on community	0.0% (0)	43.6% (17)	46.2% (18)	10.3% (4)	0.0% (0)	39
Impact of beef industry on laborers	0.0% (0)	20.5% (8)	66.7% (26)	10.3% (4)	2.6% (1)	39
Beef industry efficiency	5.1% (2)	46.2% (18)	43.6% (17)	5.1% (2)	0.0% (0)	39
Beef industry profitability	5.1% (2)	7.7% (3)	66.7% (26)	17.9% (7)	2.6% (1)	39
answered question						39
skipped question						3

12. What professional area best describes you?

		Response Percent	Response Count
Animal Scientist		12.8%	5
Beef industry executive		2.6%	1
Dietician		0.0%	0
Economist		66.7%	26
Food Scientist		0.0%	0
Meat Scientist		12.8%	5
Medical Research		0.0%	0
Nutritionist		5.1%	2
	Other (please specify)		3
answered question			39
skipped question			3

13. What best describes your current or most recent primary employment?

		Response Percent	Response Count
Government		10.3%	4
Private Industry		28.2%	11
University/college		61.5%	24
	Other (please specify)		1
answered question			39
skipped question			3

14. Now that you have completed our survey, please feel free to provide any additional comments you think would be helpful to our project. Thank you again for your time and valuable input.

	Response Count
	8
answered question	8
skipped question	34

Ground Beef Demand Feasibility Survey



1. Please rank these 7 broad factors in terms of their impact (positive or negative) on per capita ground beef consumption in the U.S over the next 10 years?

	1 (most impact)	2	3	4	5	6	7 (least impact)	Rating Average	Rating Count
Price (price per pound paid by consumer)	52.1% (25)	18.8% (9)	18.8% (9)	8.3% (4)	0.0% (0)	2.1% (1)	0.0% (0)	1.92	48
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	12.5% (6)	25.0% (12)	22.9% (11)	10.4% (5)	16.7% (8)	4.2% (2)	8.3% (4)	3.40	48
Nutrition (protein, vitamins, nutrients, etc.)	0.0% (0)	0.0% (0)	6.3% (3)	25.0% (12)	35.4% (17)	20.8% (10)	12.5% (6)	5.08	48
Health (amount and type of fat, cholesterol contribution, etc.)	0.0% (0)	8.3% (4)	27.1% (13)	25.0% (12)	18.8% (9)	10.4% (5)	10.4% (5)	4.27	48
Food Safety (E. coli, Salmonella, BSE, etc.)	35.4% (17)	35.4% (17)	10.4% (5)	6.3% (3)	2.1% (1)	8.3% (4)	2.1% (1)	2.38	48
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	0.0% (0)	6.3% (3)	10.4% (5)	8.3% (4)	16.7% (8)	29.2% (14)	29.2% (14)	5.40	48
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	0.0% (0)	6.3% (3)	4.2% (2)	16.7% (8)	10.4% (5)	25.0% (12)	37.5% (18)	5.56	48
answered question									48
skipped question									0

2. The previous question requested simple ordinal ranking information. We now ask for your opinion on the relative impact of each factor. What percentage of the total impact these 7 factors will have on per capita ground beef consumption in the U.S over the next 10 years do you believe aligns with each factor? For example, if you think a single factor is going to cause 20% of total per capita consumption change that factor would receive a value of 20 – the total should sum to 100.

	Response Average	Response Total	Response Count
Price (price per pound paid by consumer)	30.19	1,449	48
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	15.27	733	48
Nutrition (protein, vitamins, nutrients, etc.)	8.27	397	48
Health (amount and type of fat, cholesterol contribution, etc.)	10.60	509	48
Food Safety (E. coli, Salmonella, BSE, etc.)	20.88	1,002	48
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	7.52	361	48
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	7.27	349	48
	answered question		48
	skipped question		0

3. What best describes the impact each of these 7 factors will have on per capita ground beef consumption in the U.S. over the next 10 years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Price (price per pound paid by consumer)	35.4% (17)	6.3% (3)	8.3% (4)	35.4% (17)	14.6% (7)	48
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	25.0% (12)	52.1% (25)	18.8% (9)	4.2% (2)	0.0% (0)	48
Nutrition (protein, vitamins, nutrients, etc.)	6.3% (3)	45.8% (22)	41.7% (20)	6.3% (3)	0.0% (0)	48
Health (amount and type of fat, cholesterol contribution, etc.)	8.3% (4)	22.9% (11)	29.2% (14)	37.5% (18)	2.1% (1)	48
Food Safety (E. coli, Salmonella, BSE, etc.)	25.0% (12)	16.7% (8)	8.3% (4)	31.3% (15)	18.8% (9)	48
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	0.0% (0)	12.5% (6)	39.6% (19)	43.8% (21)	4.2% (2)	48
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	2.1% (1)	14.6% (7)	43.8% (21)	37.5% (18)	2.1% (1)	48
				answered question		48
				skipped question		0

4. Please rank these 7 broad factors in terms of feasibility for the industry to influence their impact on per capita ground beef consumption in the U.S over the next 10 years?

	1 (most feasible to influence)	2	3	4	5	6	7 (least feasible to influence)	Rating Average	Ratio
Price (price per pound paid by consumer)	11.9% (5)	16.7% (7)	11.9% (5)	7.1% (3)	7.1% (3)	21.4% (9)	23.8% (10)	4.40	
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	40.5% (17)	23.8% (10)	16.7% (7)	11.9% (5)	2.4% (1)	0.0% (0)	4.8% (2)	2.31	
Nutrition (protein, vitamins, nutrients, etc.)	4.8% (2)	0.0% (0)	14.3% (6)	21.4% (9)	19.0% (8)	7.1% (3)	33.3% (14)	5.05	
Health (amount and type of fat, cholesterol contribution, etc.)	0.0% (0)	16.7% (7)	14.3% (6)	21.4% (9)	26.2% (11)	16.7% (7)	4.8% (2)	4.26	
Food Safety (E. coli, Salmonella, BSE, etc.)	35.7% (15)	23.8% (10)	21.4% (9)	11.9% (5)	0.0% (0)	4.8% (2)	2.4% (1)	2.40	
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	4.8% (2)	7.1% (3)	16.7% (7)	7.1% (3)	19.0% (8)	23.8% (10)	21.4% (9)	4.86	
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	2.4% (1)	11.9% (5)	4.8% (2)	19.0% (8)	26.2% (11)	26.2% (11)	9.5% (4)	4.71	
answered question									
skipped question									

5. What best describes the feasibility (keeping your overall perspective of scientific advancement, economic aspects, industry adoption, and social impacts) of the beef industry influencing each of these 7 broad factors in relation to their potential impact on per capita ground beef consumption in the U.S. over the next 10 years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Price (price per pound paid by consumer)	14.3% (6)	33.3% (14)	21.4% (9)	21.4% (9)	9.5% (4)	42
Product Quality and Form (taste, consistency, convenience, portion size, etc.)	40.5% (17)	50.0% (21)	7.1% (3)	0.0% (0)	2.4% (1)	42
Nutrition (protein, vitamins, nutrients, etc.)	4.8% (2)	35.7% (15)	31.0% (13)	19.0% (8)	9.5% (4)	42
Health (amount and type of fat, cholesterol contribution, etc.)	16.7% (7)	42.9% (18)	26.2% (11)	9.5% (4)	4.8% (2)	42
Food Safety (E. coli, Salmonella, BSE, etc.)	45.2% (19)	50.0% (21)	2.4% (1)	2.4% (1)	0.0% (0)	42
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	9.5% (4)	35.7% (15)	28.6% (12)	14.3% (6)	11.9% (5)	42
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	9.5% (4)	42.9% (18)	28.6% (12)	14.3% (6)	4.8% (2)	42
answered question						42
skipped question						6

6. Thinking about nutrition only, what is the feasibility of the beef industry influencing the impact these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Protein content	11.9% (5)	40.5% (17)	23.8% (10)	21.4% (9)	2.4% (1)	42
Iron content	4.8% (2)	40.5% (17)	23.8% (10)	23.8% (10)	7.1% (3)	42
Zinc content	2.4% (1)	26.2% (11)	40.5% (17)	23.8% (10)	7.1% (3)	42
Carbohydrate content	0.0% (0)	23.8% (10)	33.3% (14)	28.6% (12)	14.3% (6)	42
Content of other nutrients	9.5% (4)	33.3% (14)	33.3% (14)	21.4% (9)	2.4% (1)	42
answered question						42
skipped question						6

7. Thinking about product quality and form only, what is the feasibility of the beef industry influencing the impact these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Taste	23.8% (10)	50.0% (21)	26.2% (11)	0.0% (0)	0.0% (0)	42
Juiciness	23.8% (10)	52.4% (22)	23.8% (10)	0.0% (0)	0.0% (0)	42
Consistency	33.3% (14)	57.1% (24)	7.1% (3)	2.4% (1)	0.0% (0)	42
Package/Portion size	45.2% (19)	45.2% (19)	7.1% (3)	2.4% (1)	0.0% (0)	42
Color/appearance	26.2% (11)	59.5% (25)	9.5% (4)	4.8% (2)	0.0% (0)	42
Freshness/shelf life	38.1% (16)	59.5% (25)	2.4% (1)	0.0% (0)	0.0% (0)	42
Preparation ease/convenience	35.7% (15)	52.4% (22)	9.5% (4)	2.4% (1)	0.0% (0)	42
answered question						42
skipped question						6

8. Thinking about health only, what is the feasibility of the beef industry influencing the impact these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Amount of fat	21.4% (9)	52.4% (22)	19.0% (8)	7.1% (3)	0.0% (0)	42
Type of fat	16.7% (7)	42.9% (18)	21.4% (9)	14.3% (6)	4.8% (2)	42
Cholesterol contribution	7.1% (3)	52.4% (22)	23.8% (10)	11.9% (5)	4.8% (2)	42
Arteriosclerosis ("heart disease") impact	16.7% (7)	35.7% (15)	21.4% (9)	19.0% (8)	7.1% (3)	42
Carcinogenic concerns	14.3% (6)	38.1% (16)	31.0% (13)	9.5% (4)	7.1% (3)	42
Sodium content	7.1% (3)	50.0% (21)	35.7% (15)	4.8% (2)	2.4% (1)	42
Calorie content	14.3% (6)	47.6% (20)	19.0% (8)	16.7% (7)	2.4% (1)	42
answered question						42
skipped question						6

9. Thinking about food safety only, what is the feasibility of the beef industry influencing the impact these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
E. coli	42.9% (18)	42.9% (18)	11.9% (5)	2.4% (1)	0.0% (0)	42
Salmonella	42.9% (18)	38.1% (16)	16.7% (7)	2.4% (1)	0.0% (0)	42
Listeria	26.2% (11)	42.9% (18)	21.4% (9)	7.1% (3)	2.4% (1)	42
Campylobacter	23.8% (10)	33.3% (14)	35.7% (15)	4.8% (2)	2.4% (1)	42
Bovine Spongiform Encephalopathy (BSE)	28.6% (12)	31.0% (13)	21.4% (9)	7.1% (3)	11.9% (5)	42
answered question						42
skipped question						6






10. Thinking about social aspects only, what is the feasibility of the beef industry influencing the impact these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Animal welfare	19.0% (8)	54.8% (23)	4.8% (2)	11.9% (5)	9.5% (4)	42
Produced on a small farm	4.8% (2)	40.5% (17)	19.0% (8)	21.4% (9)	14.3% (6)	42
Locally produced	7.1% (3)	42.9% (18)	28.6% (12)	16.7% (7)	4.8% (2)	42
Country of origin labeled	9.5% (4)	47.6% (20)	16.7% (7)	21.4% (9)	4.8% (2)	42
Cloning practices	11.9% (5)	28.6% (12)	28.6% (12)	16.7% (7)	14.3% (6)	42
Naturally or organically produced	9.5% (4)	57.1% (24)	23.8% (10)	4.8% (2)	4.8% (2)	42
Use of antibiotics in cattle production	16.7% (7)	47.6% (20)	19.0% (8)	14.3% (6)	2.4% (1)	42
Use of synthetic growth promotants / beta agonists in cattle production	19.0% (8)	45.2% (19)	14.3% (6)	16.7% (7)	4.8% (2)	42
				answered question		42
				skipped question		6


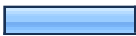

11. Thinking about sustainability only, what is the feasibility of the beef industry influencing the impact these specific issues will have on ground beef demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Impact of beef industry on environment	16.7% (7)	57.1% (24)	14.3% (6)	9.5% (4)	2.4% (1)	42
Impact of beef industry on community	19.0% (8)	38.1% (16)	28.6% (12)	9.5% (4)	4.8% (2)	42
Impact of beef industry on laborers	4.8% (2)	50.0% (21)	31.0% (13)	9.5% (4)	4.8% (2)	42
Beef industry efficiency	14.3% (6)	57.1% (24)	16.7% (7)	7.1% (3)	4.8% (2)	42
Beef industry profitability	11.9% (5)	35.7% (15)	28.6% (12)	19.0% (8)	4.8% (2)	42
				answered question		42
				skipped question		6

12. What professional area best describes you?

		Response Percent	Response Count
Animal Scientist		9.8%	4
Beef industry executive		0.0%	0
Dietician		0.0%	0
Economist		68.3%	28
Food Scientist		2.4%	1
Meat Scientist		14.6%	6
Medical Research		0.0%	0
Nutritionist		4.9%	2
	Other (please specify)		0
answered question			41
skipped question			7

13. What best describes your current or most recent primary employment?

		Response Percent	Response Count
Government		19.5%	8
Private Industry		19.5%	8
University/college		61.0%	25
	Other (please specify)		1
answered question			41
skipped question			7

14. Now that you have completed our survey, please feel free to provide any additional comments you think would be helpful to our project. Thank you again for your time and valuable input.

	Response Count
	7
answered question	7
skipped question	41

Beef Steak Demand Impact Survey



1. Please rank these 7 broad factors in terms of their impact (positive or negative) on per capita beef steak consumption in the U.S over the next 10 years?

	1 (most impact)	2	3	4	5	6	7 (least impact)	Rating Average	Rating Count
Price (price per pound paid by consumer)	64.1% (25)	15.4% (6)	15.4% (6)	0.0% (0)	5.1% (2)	0.0% (0)	0.0% (0)	1.67	39
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	12.8% (5)	35.9% (14)	23.1% (9)	17.9% (7)	0.0% (0)	7.7% (3)	2.6% (1)	2.90	39
Nutrition (protein, vitamins, nutrients, etc.)	0.0% (0)	0.0% (0)	15.4% (6)	23.1% (9)	17.9% (7)	17.9% (7)	25.6% (10)	5.15	39
Health (amount and type of fat, cholesterol contribution, etc.)	7.7% (3)	17.9% (7)	12.8% (5)	20.5% (8)	25.6% (10)	15.4% (6)	0.0% (0)	3.85	39
Food Safety (E. coli, Salmonella, BSE, etc.)	12.8% (5)	20.5% (8)	17.9% (7)	15.4% (6)	20.5% (8)	7.7% (3)	5.1% (2)	3.54	39
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	2.6% (1)	7.7% (3)	5.1% (2)	15.4% (6)	17.9% (7)	25.6% (10)	25.6% (10)	5.18	39
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	0.0% (0)	2.6% (1)	10.3% (4)	7.7% (3)	12.8% (5)	25.6% (10)	41.0% (16)	5.72	39
answered question									39
skipped question									0

2. The previous question requested simple ordinal ranking information. We now ask for your opinion on the relative impact of each factor. What percentage of the total impact these 7 factors will have on per capita beef steak consumption in the U.S over the next 10 years do you believe aligns with each factor? For example, if you think a single factor is going to cause 20% of total per capita consumption change that factor would receive a value of 20 – the total should sum to 100.

	Response Average	Response Total	Response Count
Price (price per pound paid by consumer)	30.26	1,180	39
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	17.72	691	39
Nutrition (protein, vitamins, nutrients, etc.)	8.51	332	39
Health (amount and type of fat, cholesterol contribution, etc.)	13.13	512	39
Food Safety (E. coli, Salmonella, BSE, etc.)	14.36	560	39
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	8.13	317	39
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	7.90	308	39
	answered question		39
	skipped question		0

3. What best describes the impact each of these 7 factors will have on per capita beef steak consumption in the U.S. over the next 10 years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Price (price per pound paid by consumer)	15.4% (6)	2.6% (1)	7.7% (3)	46.2% (18)	28.2% (11)	39
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	33.3% (13)	51.3% (20)	2.6% (1)	10.3% (4)	2.6% (1)	39
Nutrition (protein, vitamins, nutrients, etc.)	2.6% (1)	51.3% (20)	35.9% (14)	10.3% (4)	0.0% (0)	39
Health (amount and type of fat, cholesterol contribution, etc.)	7.7% (3)	20.5% (8)	30.8% (12)	33.3% (13)	7.7% (3)	39
Food Safety (E. coli, Salmonella, BSE, etc.)	20.5% (8)	17.9% (7)	12.8% (5)	46.2% (18)	2.6% (1)	39
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	0.0% (0)	15.4% (6)	33.3% (13)	48.7% (19)	2.6% (1)	39
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	2.6% (1)	15.4% (6)	25.6% (10)	56.4% (22)	0.0% (0)	39
				answered question		39
				skipped question		0

4. Please rank these 7 broad factors in terms of feasibility for the industry to influence their impact on per capita beef steak consumption in the U.S over the next 10 years?

	1 (most feasible to influence)	2	3	4	5	6	7 (least feasible to influence)	Rating Average	Ratio
Price (price per pound paid by consumer)	8.6% (3)	8.6% (3)	11.4% (4)	14.3% (5)	11.4% (4)	17.1% (6)	28.6% (10)	4.77	
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	48.6% (17)	25.7% (9)	14.3% (5)	11.4% (4)	0.0% (0)	0.0% (0)	0.0% (0)	1.89	
Nutrition (protein, vitamins, nutrients, etc.)	0.0% (0)	5.7% (2)	20.0% (7)	11.4% (4)	25.7% (9)	14.3% (5)	22.9% (8)	4.91	
Health (amount and type of fat, cholesterol contribution, etc.)	2.9% (1)	5.7% (2)	5.7% (2)	17.1% (6)	31.4% (11)	28.6% (10)	8.6% (3)	4.89	
Food Safety (E. coli, Salmonella, BSE, etc.)	31.4% (11)	31.4% (11)	22.9% (8)	8.6% (3)	2.9% (1)	2.9% (1)	0.0% (0)	2.29	
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	2.9% (1)	11.4% (4)	14.3% (5)	20.0% (7)	8.6% (3)	17.1% (6)	25.7% (9)	4.74	
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	5.7% (2)	11.4% (4)	11.4% (4)	17.1% (6)	20.0% (7)	20.0% (7)	14.3% (5)	4.51	
							answered question		
							skipped question		

5. What best describes the feasibility (keeping your overall perspective of scientific advancement, economic aspects, industry adoption, and social impacts) of the beef industry influencing each of these 7 broad factors in relation to their potential impact on per capita beef steak consumption in the U.S. over the next 10 years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Price (price per pound paid by consumer)	5.7% (2)	25.7% (9)	31.4% (11)	25.7% (9)	11.4% (4)	35
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	40.0% (14)	60.0% (21)	0.0% (0)	0.0% (0)	0.0% (0)	35
Nutrition (protein, vitamins, nutrients, etc.)	2.9% (1)	34.3% (12)	40.0% (14)	11.4% (4)	11.4% (4)	35
Health (amount and type of fat, cholesterol contribution, etc.)	8.6% (3)	48.6% (17)	34.3% (12)	8.6% (3)	0.0% (0)	35
Food Safety (E. coli, Salmonella, BSE, etc.)	45.7% (16)	48.6% (17)	5.7% (2)	0.0% (0)	0.0% (0)	35
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	5.7% (2)	57.1% (20)	22.9% (8)	11.4% (4)	2.9% (1)	35
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	5.7% (2)	54.3% (19)	22.9% (8)	17.1% (6)	0.0% (0)	35
				answered question		35
				skipped question		4

6. Thinking about nutrition only, what impact do you expect each of these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Protein content	38.2% (13)	47.1% (16)	14.7% (5)	0.0% (0)	0.0% (0)	34
Iron content	11.8% (4)	64.7% (22)	23.5% (8)	0.0% (0)	0.0% (0)	34
Zinc content	8.8% (3)	38.2% (13)	52.9% (18)	0.0% (0)	0.0% (0)	34
Carbohydrate content	17.6% (6)	11.8% (4)	52.9% (18)	17.6% (6)	0.0% (0)	34
Content of other nutrients	11.8% (4)	41.2% (14)	38.2% (13)	8.8% (3)	0.0% (0)	34
answered question						34
skipped question						5

7. Thinking about product quality and form only, what impact do you expect each of these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Taste	58.8% (20)	26.5% (9)	5.9% (2)	8.8% (3)	0.0% (0)	34
Juiciness	35.3% (12)	47.1% (16)	11.8% (4)	5.9% (2)	0.0% (0)	34
Tenderness	38.2% (13)	47.1% (16)	5.9% (2)	8.8% (3)	0.0% (0)	34
Package/Portion size	20.6% (7)	52.9% (18)	14.7% (5)	11.8% (4)	0.0% (0)	34
Color/appearance	20.6% (7)	70.6% (24)	5.9% (2)	2.9% (1)	0.0% (0)	34
Freshness/shelf life	20.6% (7)	58.8% (20)	14.7% (5)	5.9% (2)	0.0% (0)	34
Preparation ease/convenience	50.0% (17)	32.4% (11)	11.8% (4)	5.9% (2)	0.0% (0)	34
answered question						34
skipped question						5

8. Thinking about health only, what impact do you expect each of these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Amount of fat	5.9% (2)	17.6% (6)	26.5% (9)	41.2% (14)	8.8% (3)	34
Type of fat	2.9% (1)	26.5% (9)	29.4% (10)	38.2% (13)	2.9% (1)	34
Cholesterol contribution	5.9% (2)	11.8% (4)	23.5% (8)	44.1% (15)	14.7% (5)	34
Arteriosclerosis ("heart disease") impact	14.7% (5)	8.8% (3)	17.6% (6)	44.1% (15)	14.7% (5)	34
Carcinogenic concerns	5.9% (2)	14.7% (5)	41.2% (14)	26.5% (9)	11.8% (4)	34
Sodium content	0.0% (0)	35.3% (12)	50.0% (17)	11.8% (4)	2.9% (1)	34
Calorie content	11.8% (4)	20.6% (7)	38.2% (13)	29.4% (10)	0.0% (0)	34
answered question						34
skipped question						5

9. Thinking about food safety only, what impact do you expect each of these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
E. coli	5.9% (2)	11.8% (4)	14.7% (5)	52.9% (18)	14.7% (5)	34
Salmonella	5.9% (2)	11.8% (4)	26.5% (9)	44.1% (15)	11.8% (4)	34
Listeria	5.9% (2)	5.9% (2)	41.2% (14)	35.3% (12)	11.8% (4)	34
Campylobacter	2.9% (1)	5.9% (2)	50.0% (17)	35.3% (12)	5.9% (2)	34
Bovine Spongiform Encephalopathy (BSE)	2.9% (1)	8.8% (3)	52.9% (18)	23.5% (8)	11.8% (4)	34
answered question						34
skipped question						5





10. Thinking about social aspects only, what impact do you expect each of these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Animal welfare	2.9% (1)	41.2% (14)	26.5% (9)	23.5% (8)	5.9% (2)	34
Produced on a small farm	0.0% (0)	50.0% (17)	50.0% (17)	0.0% (0)	0.0% (0)	34
Locally produced	14.7% (5)	67.6% (23)	17.6% (6)	0.0% (0)	0.0% (0)	34
Country of origin labeled	8.8% (3)	32.4% (11)	55.9% (19)	2.9% (1)	0.0% (0)	34
Cloning practices	0.0% (0)	2.9% (1)	50.0% (17)	23.5% (8)	23.5% (8)	34
Naturally or organically produced	2.9% (1)	64.7% (22)	32.4% (11)	0.0% (0)	0.0% (0)	34
Use of antibiotics in cattle production	0.0% (0)	8.8% (3)	14.7% (5)	61.8% (21)	14.7% (5)	34
Use of synthetic growth promotants / beta agonists in cattle production	0.0% (0)	0.0% (0)	17.6% (6)	67.6% (23)	14.7% (5)	34
answered question						34
skipped question						5


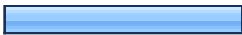

11. Thinking about sustainability only, what impact do you expect each of these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Impact of beef industry on environment	0.0% (0)	17.6% (6)	35.3% (12)	44.1% (15)	2.9% (1)	34
Impact of beef industry on community	2.9% (1)	26.5% (9)	64.7% (22)	5.9% (2)	0.0% (0)	34
Impact of beef industry on laborers	0.0% (0)	14.7% (5)	58.8% (20)	23.5% (8)	2.9% (1)	34
Beef industry efficiency	8.8% (3)	50.0% (17)	32.4% (11)	5.9% (2)	2.9% (1)	34
Beef industry profitability	5.9% (2)	17.6% (6)	55.9% (19)	17.6% (6)	2.9% (1)	34
answered question						34
skipped question						5

12. What professional area best describes you?

		Response Percent	Response Count
Animal Scientist		14.7%	5
Beef industry executive		8.8%	3
Dietician		0.0%	0
Economist		67.6%	23
Food Scientist		0.0%	0
Meat Scientist		8.8%	3
Medical Research		0.0%	0
Nutritionist		0.0%	0
	Other (please specify)		5
answered question			34
skipped question			5

13. What best describes your current or most recent primary employment?

		Response Percent	Response Count
Government		8.8%	3
Private Industry		35.3%	12
University/college		55.9%	19
	Other (please specify)		3
answered question			34
skipped question			5

14. Now that you have completed our survey, please feel free to provide any additional comments you think would be helpful to our project. Thank you again for your time and valuable input.

	Response Count
	6
answered question	6
skipped question	33

Beef Steak Demand Feasibility Survey



1. Please rank these 7 broad factors in terms of their impact (positive or negative) on per capita beef steak consumption in the U.S over the next 10 years?

	1 (most impact)	2	3	4	5	6	7 (least impact)	Rating Average	Rating Count
Price (price per pound paid by consumer)	54.0% (27)	24.0% (12)	10.0% (5)	4.0% (2)	8.0% (4)	0.0% (0)	0.0% (0)	1.88	50
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	24.0% (12)	32.0% (16)	12.0% (6)	10.0% (5)	6.0% (3)	8.0% (4)	8.0% (4)	2.98	50
Nutrition (protein, vitamins, nutrients, etc.)	0.0% (0)	2.0% (1)	8.0% (4)	16.0% (8)	34.0% (17)	18.0% (9)	22.0% (11)	5.24	50
Health (amount and type of fat, cholesterol contribution, etc.)	8.0% (4)	14.0% (7)	24.0% (12)	24.0% (12)	8.0% (4)	14.0% (7)	8.0% (4)	3.84	50
Food Safety (E. coli, Salmonella, BSE, etc.)	8.0% (4)	14.0% (7)	34.0% (17)	20.0% (10)	16.0% (8)	2.0% (1)	6.0% (3)	3.52	50
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	6.0% (3)	4.0% (2)	6.0% (3)	10.0% (5)	14.0% (7)	36.0% (18)	24.0% (12)	5.26	50
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	0.0% (0)	10.0% (5)	6.0% (3)	16.0% (8)	14.0% (7)	22.0% (11)	32.0% (16)	5.28	50
answered question									50
skipped question									0

2. The previous question requested simple ordinal ranking information. We now ask for your opinion on the relative impact of each factor. What percentage of the total impact these 7 factors will have on per capita beef steak consumption in the U.S over the next 10 years do you believe aligns with each factor? For example, if you think a single factor is going to cause 20% of total per capita consumption change that factor would receive a value of 20 – the total should sum to 100.

	Response Average	Response Total	Response Count
Price (price per pound paid by consumer)	29.74	1,487	50
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	19.04	952	50
Nutrition (protein, vitamins, nutrients, etc.)	8.66	433	50
Health (amount and type of fat, cholesterol contribution, etc.)	12.70	635	50
Food Safety (E. coli, Salmonella, BSE, etc.)	12.26	613	50
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	9.22	461	50
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	8.38	419	50
	answered question		50
	skipped question		0

3. What best describes the impact each of these 7 factors will have on per capita beef steak consumption in the U.S. over the next 10 years?

	Very Positive Impact	Slightly Positive Impact	Neutral Impact	Slightly Negative Impact	Very Negative Impact	Rating Count
Price (price per pound paid by consumer)	14.0% (7)	6.0% (3)	10.0% (5)	38.0% (19)	32.0% (16)	50
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	32.0% (16)	54.0% (27)	2.0% (1)	10.0% (5)	2.0% (1)	50
Nutrition (protein, vitamins, nutrients, etc.)	2.0% (1)	60.0% (30)	32.0% (16)	6.0% (3)	0.0% (0)	50
Health (amount and type of fat, cholesterol contribution, etc.)	6.0% (3)	32.0% (16)	26.0% (13)	34.0% (17)	2.0% (1)	50
Food Safety (E. coli, Salmonella, BSE, etc.)	8.0% (4)	22.0% (11)	26.0% (13)	32.0% (16)	12.0% (6)	50
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	2.0% (1)	18.0% (9)	26.0% (13)	48.0% (24)	6.0% (3)	50
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	2.0% (1)	26.0% (13)	26.0% (13)	40.0% (20)	6.0% (3)	50
				answered question		50
				skipped question		0

4. Please rank these 7 broad factors in terms of feasibility for the industry to influence their impact on per capita beef steak consumption in the U.S over the next 10 years?

	1 (most feasible to influence)	2	3	4	5	6	7 (least feasible to influence)	Rating Average	Response Count
Price (price per pound paid by consumer)	6.5% (3)	10.9% (5)	15.2% (7)	10.9% (5)	15.2% (7)	15.2% (7)	26.1% (12)	4.67	
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	39.1% (18)	28.3% (13)	13.0% (6)	8.7% (4)	6.5% (3)	4.3% (2)	0.0% (0)	2.28	
Nutrition (protein, vitamins, nutrients, etc.)	0.0% (0)	2.2% (1)	8.7% (4)	17.4% (8)	15.2% (7)	19.6% (9)	37.0% (17)	5.52	
Health (amount and type of fat, cholesterol contribution, etc.)	0.0% (0)	4.3% (2)	10.9% (5)	10.9% (5)	19.6% (9)	32.6% (15)	21.7% (10)	5.30	
Food Safety (E. coli, Salmonella, BSE, etc.)	26.1% (12)	21.7% (10)	17.4% (8)	21.7% (10)	10.9% (5)	2.2% (1)	0.0% (0)	2.76	
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	15.2% (7)	15.2% (7)	19.6% (9)	17.4% (8)	13.0% (6)	10.9% (5)	8.7% (4)	3.65	
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	13.0% (6)	17.4% (8)	15.2% (7)	13.0% (6)	19.6% (9)	15.2% (7)	6.5% (3)	3.80	
answered question									
skipped question									

5. What best describes the feasibility (keeping your overall perspective of scientific advancement, economic aspects, industry adoption, and social impacts) of the beef industry influencing each of these 7 broad factors in relation to their potential impact on per capita beef steak consumption in the U.S. over the next 10 years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Price (price per pound paid by consumer)	17.4% (8)	30.4% (14)	17.4% (8)	26.1% (12)	8.7% (4)	46
Product Quality and Form (taste, tenderness, convenience, portion size, etc.)	39.1% (18)	54.3% (25)	4.3% (2)	2.2% (1)	0.0% (0)	46
Nutrition (protein, vitamins, nutrients, etc.)	6.5% (3)	28.3% (13)	37.0% (17)	23.9% (11)	4.3% (2)	46
Health (amount and type of fat, cholesterol contribution, etc.)	4.3% (2)	32.6% (15)	30.4% (14)	30.4% (14)	2.2% (1)	46
Food Safety (E. coli, Salmonella, BSE, etc.)	39.1% (18)	47.8% (22)	8.7% (4)	4.3% (2)	0.0% (0)	46
Social Aspects (animal welfare, small farm, origin, cloning, etc.)	15.2% (7)	63.0% (29)	10.9% (5)	6.5% (3)	4.3% (2)	46
Sustainability Aspects (impact on environment, efficiency, profitability, etc.)	15.2% (7)	67.4% (31)	8.7% (4)	8.7% (4)	0.0% (0)	46
				answered question		46
				skipped question		4

6. Thinking about nutrition only, what is the feasibility of the beef industry influencing the impact these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Protein content	10.9% (5)	39.1% (18)	28.3% (13)	17.4% (8)	4.3% (2)	46
Iron content	6.5% (3)	30.4% (14)	41.3% (19)	19.6% (9)	2.2% (1)	46
Zinc content	2.2% (1)	26.1% (12)	45.7% (21)	21.7% (10)	4.3% (2)	46
Carbohydrate content	4.3% (2)	23.9% (11)	39.1% (18)	26.1% (12)	6.5% (3)	46
Content of other nutrients	4.3% (2)	32.6% (15)	34.8% (16)	26.1% (12)	2.2% (1)	46
answered question						46
skipped question						4

7. Thinking about product quality and form only, what is the feasibility of the beef industry influencing the impact these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Taste	15.2% (7)	73.9% (34)	4.3% (2)	6.5% (3)	0.0% (0)	46
Juiciness	17.4% (8)	56.5% (26)	21.7% (10)	4.3% (2)	0.0% (0)	46
Tenderness	26.1% (12)	60.9% (28)	10.9% (5)	2.2% (1)	0.0% (0)	46
Package/Portion size	54.3% (25)	39.1% (18)	4.3% (2)	0.0% (0)	2.2% (1)	46
Color/appearance	15.2% (7)	71.7% (33)	13.0% (6)	0.0% (0)	0.0% (0)	46
Freshness/shelf life	30.4% (14)	60.9% (28)	6.5% (3)	0.0% (0)	2.2% (1)	46
Preparation ease/convenience	58.7% (27)	37.0% (17)	2.2% (1)	0.0% (0)	2.2% (1)	46
answered question						46
skipped question						4

8. Thinking about health only, what is the feasibility of the beef industry influencing the impact these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Amount of fat	10.9% (5)	65.2% (30)	13.0% (6)	10.9% (5)	0.0% (0)	46
Type of fat	6.5% (3)	56.5% (26)	28.3% (13)	8.7% (4)	0.0% (0)	46
Cholesterol contribution	8.7% (4)	41.3% (19)	28.3% (13)	19.6% (9)	2.2% (1)	46
Arteriosclerosis ("heart disease") impact	10.9% (5)	34.8% (16)	32.6% (15)	19.6% (9)	2.2% (1)	46
Carcinogenic concerns	8.7% (4)	41.3% (19)	37.0% (17)	10.9% (5)	2.2% (1)	46
Sodium content	15.2% (7)	30.4% (14)	41.3% (19)	10.9% (5)	2.2% (1)	46
Calorie content	6.5% (3)	37.0% (17)	43.5% (20)	10.9% (5)	2.2% (1)	46
answered question						46
skipped question						4

9. Thinking about food safety only, what is the feasibility of the beef industry influencing the impact these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
E. coli	37.8% (17)	46.7% (21)	11.1% (5)	4.4% (2)	0.0% (0)	45
Salmonella	31.1% (14)	48.9% (22)	15.6% (7)	4.4% (2)	0.0% (0)	45
Listeria	24.4% (11)	46.7% (21)	20.0% (9)	6.7% (3)	2.2% (1)	45
Campylobacter	22.2% (10)	46.7% (21)	24.4% (11)	4.4% (2)	2.2% (1)	45
Bovine Spongiform Encephalopathy (BSE)	26.7% (12)	37.8% (17)	15.6% (7)	15.6% (7)	4.4% (2)	45
answered question						45
skipped question						5







10. Thinking about social aspects only, what is the feasibility of the beef industry influencing the impact these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Animal welfare	31.1% (14)	48.9% (22)	13.3% (6)	2.2% (1)	4.4% (2)	45
Produced on a small farm	8.9% (4)	42.2% (19)	17.8% (8)	22.2% (10)	8.9% (4)	45
Locally produced	8.9% (4)	55.6% (25)	24.4% (11)	11.1% (5)	0.0% (0)	45
Country of origin labeled	20.0% (9)	40.0% (18)	24.4% (11)	11.1% (5)	4.4% (2)	45
Cloning practices	13.3% (6)	35.6% (16)	15.6% (7)	31.1% (14)	4.4% (2)	45
Naturally or organically produced	15.6% (7)	48.9% (22)	24.4% (11)	8.9% (4)	2.2% (1)	45
Use of antibiotics in cattle production	31.1% (14)	44.4% (20)	6.7% (3)	11.1% (5)	6.7% (3)	45
Use of synthetic growth promotants / beta agonists in cattle production	24.4% (11)	42.2% (19)	6.7% (3)	22.2% (10)	4.4% (2)	45
				answered question		45
				skipped question		5


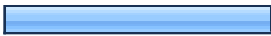

11. Thinking about sustainability only, what is the feasibility of the beef industry influencing the impact these specific issues will have on beef steak demand in the U.S. over the next ten years?

	Feasible to have substantial (break-thru) influence	Feasible to have small (incremental) influence	Neutral feasibility	Infeasible to have substantial (break-thru) influence	Infeasible to have small (incremental) influence	Rating Count
Impact of beef industry on environment	17.8% (8)	57.8% (26)	11.1% (5)	11.1% (5)	2.2% (1)	45
Impact of beef industry on community	13.3% (6)	57.8% (26)	17.8% (8)	11.1% (5)	0.0% (0)	45
Impact of beef industry on laborers	8.9% (4)	44.4% (20)	37.8% (17)	4.4% (2)	4.4% (2)	45
Beef industry efficiency	20.0% (9)	60.0% (27)	15.6% (7)	2.2% (1)	2.2% (1)	45
Beef industry profitability	20.0% (9)	44.4% (20)	17.8% (8)	15.6% (7)	2.2% (1)	45
answered question						45
skipped question						5

12. What professional area best describes you?

		Response Percent	Response Count
Animal Scientist		6.7%	3
Beef industry executive		11.1%	5
Dietician		0.0%	0
Economist		68.9%	31
Food Scientist		2.2%	1
Meat Scientist		8.9%	4
Medical Research		2.2%	1
Nutritionist		0.0%	0
	Other (please specify)		3
answered question			45
skipped question			5

13. What best describes your current or most recent primary employment?

		Response Percent	Response Count
Government		13.3%	6
Private Industry		40.0%	18
University/college		46.7%	21
	Other (please specify)		2
answered question			45
skipped question			5

14. Now that you have completed our survey, please feel free to provide any additional comments you think would be helpful to our project. Thank you again for your time and valuable input.

	Response Count
	6
answered question	6
skipped question	44

14. Now that you have completed our survey, please feel free to provide any additional comments you think would be helpful to our project. Thank you again for your time and valuable input.

Ground Beef Demand – Impact Survey

Consumers always look at these issues when food is in abundance. They have never had to evaluate the environmental and animal welfare issues while hungry. A lot of priorities will shift when sourcing product becomes a challenge.

2/20/2013 11:44 AM [View Responses](#) [Categorize As](#) ▼



A bit difficult to answer the question on impact of the various pathogens. For example how could listeria have a positive impact on the beef industry. I suppose you could say for example that salmonella will have a more negative impact on poultry or swine which does benefit the beef industry. For the most part work in this area hopefully prevents a serious negative impact

2/20/2013 11:09 AM [View Responses](#) [Categorize As](#) ▼



Difficult to understand many of your questions.

2/20/2013 10:30 AM [View Responses](#) [Categorize As](#) ▼



Overall I find this to be an interesting survey and study, however depending on who you plan to send this to some of the areas you are discussing might have little to no impact on your sample. Many people just seem to be concerned with does the beef taste good and how much does it cost and neglect many other aspects related to beef. Also my professional area isnt listed and im forced to choose an area that I am not involved in. You may wish to fix that aspect of the survey.

2/20/2013 10:15 AM [View Responses](#) [Categorize As](#) ▼



Results will be interesting.

2/18/2013 6:41 PM [View Responses](#) [Categorize As](#) ▼



Grain Prices as a function of energy prices and foreign demand will be significant exogenous factors in long term beef demand.

2/18/2013 10:48 AM [View Responses](#) [Categorize As](#) ▼



twinning would be a major breakthrough

2/15/2013 2:41 PM [View Responses](#) [Categorize As](#) ▼



The sum of the impacts of these topics individually is smaller than the whole. I believe it is possible the number and uniform negativity of the messages consumer receive creates a larger response.

2/15/2013 11:17 AM [View Responses](#) [Categorize As](#) ▼

Ground Beef Demand – Feasibility Survey

Competition for feed grains will be a challenge. Increased efficiency of production will be vital.

2/20/2013 4:04 PM [View Responses](#) [Categorize As](#) ▼



food safety can be resolved with irradiation and additives, but will take education and willingness to change... BSE is old news, fat and nutrition can be changed by formulation... tradeoffs between taste and fat content well known..

2/16/2013 1:58 AM [View Responses](#) [Categorize As](#) ▼



I expect to see a lot more imported ground beef in our future. Good for the consumer, bad for the producer / processor.

2/15/2013 11:14 AM [View Responses](#) [Categorize As](#) ▼



Very interesting questions...though I had trouble understanding the concept of "sustainability".

2/15/2013 10:49 AM [View Responses](#) [Categorize As](#) ▼



I think your "Health" and "Nutrition" factors have too much overlap.

2/15/2013 10:48 AM [View Responses](#) [Categorize As](#) ▼



Ethanol is the biggest factor followed by substained drought. Apparaently, we can't influence either of those.

2/15/2013 10:32 AM [View Responses](#) [Categorize As](#) ▼



The scope of 10 years makes it difficult to access the feasibility of impact. I believe so many of these issues only become feasible to make large impacts through other dependent events. For example, food safety is very low on my ranking scale. Right now, I believe consumers do not worry about beef, thus improving upon this would have a very limited impact. However, if we had an outbreak of E. coli, addressing that concern would be able to shift beef demand dramatically. Similar things, apply to Nutrition and health. We all already lived through the Atkins diet, and saw a change in consumption related to that, but it required Atkins as a catalyst to change consumer behavior. Secondly, I wanted to mention I found the categories difficult to assess. Consumer preferences largely dictate purchases up to a certain price point. However, if let's say a rather large breakthrough lead to improved efficiency, and consequently lowered prices to point where consumers shopped more by taste then by price, which had the largest impact?

2/15/2013 10:26 AM [View Responses](#) [Categorize As](#) ▼

Beef Steak Demand – Impact Survey

Overall, I am concerned about our industry asking consumers to pay more for beef, at a time when there are increasing quality concerns. I think we can make positive progress on the issues management side, from animal welfare to sustainability but this will take careful consumer messaging.

2/22/2013 4:21 PM [View Responses](#) [Categorize As](#) ▼



When you discussed what effect beef price would have on demand, I guess we are both assuming price will go up, based on the current market situation. But it could possibly drop in the long term or it might just increase proportionate to inflation, in which case it might have no effect.

2/20/2013 3:31 PM [View Responses](#) [Categorize As](#) ▼



Research findings could flip a specific issue from negative to positive depending on the results!

2/20/2013 11:22 AM [View Responses](#) [Categorize As](#) ▼



You are ignoring the developing world Categories are too vague Too much use of "etc"

2/17/2013 7:46 AM [View Responses](#) [Categorize As](#) ▼



answers would be different for ground product

2/15/2013 12:06 AM [View Responses](#) [Categorize As](#) ▼



this is a great idea, with hard work we can focus the industry on producing a better product and properly address consumer concerns.

2/15/2013 10:16 AM [View Responses](#) [Categorize As](#) ▼

Beef Steak Demand – Feasibility Survey

Good luck! Numerous potential challenges/opportunities for beef demand.

2/22/2013 6:01 PM [View Responses](#) [Categorize As](#) ▼



Examine beef demand for different segments of consumers

2/15/2013 11:56 AM [View Responses](#) [Categorize As](#) ▼



The beef industry has an opportunity to distinguish itself as the most natural production system in the protein complex. While Grass Fed is the most natural, feedlot cattle spend a small percentage of their life in confinement when compared to hogs and chickens.

2/15/2013 10:53 AM [View Responses](#) [Categorize As](#) ▼



In terms of your categories for quality of product I think "consistency" of a quality steak is an important attribute. Also in your feasibility questions I think you have 2 columns reversed at least in what I think makes sense reading left to right - "Infeasible to have substantiation influence" and "Infeasible to have small influence" I think those two should be switched around? I had to reread a couple of my answers because I had those 2 categories switched in my head, but then again maybe I am just dumb and everyone else will have no problem. Otherwise I think this will be a very interesting survey to see the results. Keep us posted how it turns out and thank you for your research efforts which are invaluable to the beef industry!

2/15/2013 10:26 AM [View Responses](#) [Categorize As](#) ▼



Consumers assume food safety. re your questions about it relative importance / impact, it is almost treated as a dummy variable and not continuous. that is, food safety has no impact as long as food is safe. if its not, it is a disaster

2/15/2013 10:12 AM [View Responses](#) [Categorize As](#) ▼



Whatever the industry can do to make beef the best value protein will, far and away, have the most dramatic impact on consumption of beef going forward.

2/15/2013 10:09 AM [View Responses](#) [Categorize As](#) ▼