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Ohio Born and Raised Beef Survey Final Report

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I. INTRODUCTION

The University of Dayton's Center for Business and Economic Research (CBER) supported the Division of Markets in its efforts to understand the potential marketability of beef sold as Ohio born and Raised. CBER conducted 473 telephone interviews with Ohio consumers who have household incomes above \$70,000, and are the primary grocery shopper for their family. The goal was to talk to 400 upper income Ohio consumers who eat beef at least once a week. Only 473 total interviews were required to reach that goal.

The objectives of the project are to understand:

Aided and unaided reactions to the phrase “Ohio Born and Raised Beef”.

In what retail outlets would consumers expect to find this beef?

Would consumers pay a price differential for beef labeled “Ohio Born and Raised Beef”?

What other characteristics would it be important to have associated in the consumers mind with “Ohio Born and Raised Beef”?

Characterize the retail market niche that “Ohio Born and Raised Beef” might fill with respect to consumers.

In the next section, the study methodology is explained. The following section provides an analysis of survey results. A copy of the survey questionnaire is provided in Appendix A.

II. METHODOLOGY

CBER conducted a 10 to 12 minute telephone survey with a random sample of 473 Ohio consumers who have household incomes above \$70,000, and are the primary grocery shopper for their family. A quota of 400 interviews needed to be with households that eat beef at least once a week. Respondents interviewed who indicated they eat beef less than once a week were simply asked a short list of demographic questions so that the relative size of the market could be calculated. In the event it only required 473 total interviews to obtain the 400 interviews with people who ate beef at least once a week. The interviews were conducted over the period from October 9th to 26th, 2001. The random sample of Ohio upper income households was purchased from Experian, a major provider of sample lists.

A sample size of 400 provides a worse case sampling error of +/-4.9% at a 95% confidence level when opinion on a topic is evenly split (50%/50%). For example, if 50% of respondents in the sample would not pay any premium for Ohio Born and Raised Beef one would be able to assert that if that same population was sampled another 100 times, 95 of those times the percentage responding in that fashion would lie between 45.1% and 54.9%.

In the following section, survey results will be presented in order of question asked. Basic frequencies are reported in text tables. Where significant, important demographic differences in response by income, education and age will be highlighted. The tables associated with these demographic differences are relegated to an appendix.

III. RESULTS

A. Beef Consumption Demographics

Respondents were initially asked:

Thinking of your household's consumption of beef products (steaks, roasts and other products such as ground beef) both when you eat out and when you eat at home which of the following best describe your consumption patterns:

We consume beef products:

- less than once a month*
- once or twice a month*
- once a week*
- more than once a week.*

- Eighty-four percent of the sample indicated they consumed beef products at least once a week (Table 1).

Table 1: Times Per Month Beef is Consumed In Household

	Count	%
Less Than Once a Month	21	4.4%
Once or Twice a Month	52	11.0%
Once a Week	155	32.8%
More Than Once a Week	245	51.8%
Total Respondents	473	

A slightly higher percentage of those 55-65 (90%) and a slightly lower percent of those over 65 (80%) consume beef at least once a week than respondents in general, (see Table 1a). A slightly higher percent of those with household incomes \$70,000-\$90,000 (90%) consume

beef at least once a week than respondents in general (Table 1c). There were no significant variations by education in the percent of respondents who consume beef products at least once a week (Table 1b).¹

¹ In all the survey results to follow the sample of respondents is the 400 respondents who eat beef products at least once a week.

B. Particular Beef Product Demographics

1. Introduction

As a follow-up, all 400 respondents who indicated they consume beef at least once a week were asked:

Now for each of the following beef products (and thinking both of your restaurant and at home consumption), please indicate whether your household consumes this type of beef products less than once a month, once or twice a month, once a week, more than once a week.

Steaks

Roasts

Ground product such as ground beef, ground round, ground chuck, ground sirloin

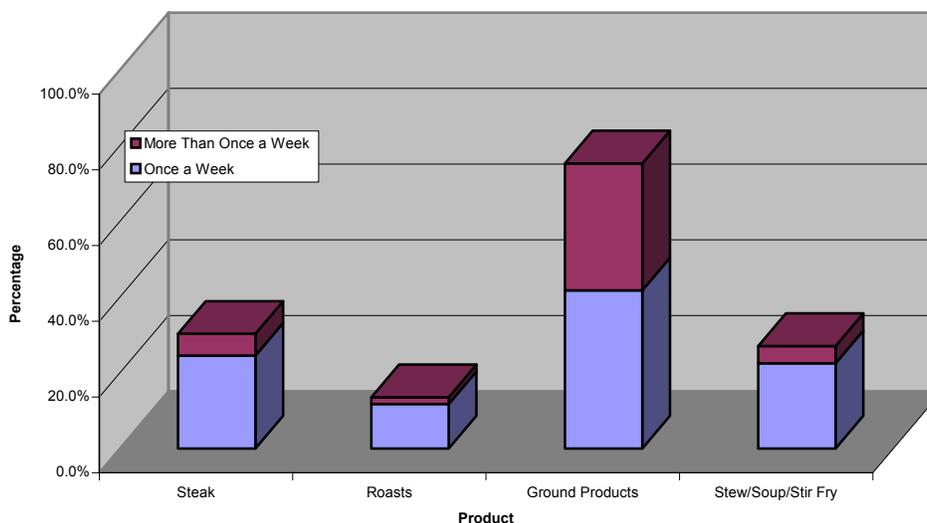
Stew/soup/stir-fry meats

- Frequency of consumption varies dramatically with type of beef product. While 75% of respondents consumed ground products at least once a week, only 30% consumed steak products at least once a week, and only 14% consumed roast products at least once a week (see Table 2 and Chart.)

Table 2: Number of Times Each Beef Product Is Consumed Per Month In Household

	Steak	Roasts	Ground Products	Stew/Soup/ Stir Fry
	%	%	%	%
Less Than Once a Month	18.5%	28.8%	3.0%	26.8%
Once or Twice a Month	51.3%	57.8%	21.8%	46.3%
Once a Week	24.5%	11.8%	41.8%	22.5%
More Than Once a Week	5.8%	1.8%	33.5%	4.5%
Total Consuming At Least Once/Month	100.0%	100.0%	100.0%	100.0%

Frequency of Consumption of Particular Beef Products by Households who Consume Beef Products at Least Once a Week



2. Steak Consumption Demographics [Tables 2.1a-c, Appendix]

Steak consumption appears to be more frequent among those whose incomes are above \$110,000 and with some post college advanced graduate degree. While 36% of those with incomes above \$110,000 consumed steak at least once a week, only 30% of respondents in general did so. Only 10% of those with advanced degrees consumed steak less than once a month while approximately 20% of those with less education did so.

3. Roasts Consumption Demographics [Tables 2.2a-c, Appendix]

While roasts in general are utilized less, usage of roasts is strongly age related. While 12% of respondents in general use roast at least once a week, 20% of those 65 or older do so. Related to the age issue, roast usage appears to be greater among those with a high school education or less; 19% of those with high school or less consume roast at least once a week, while only 12% of respondents in general do.

4. Ground Beef Products Consumption Demographics [Tables 2.3a-c, Appendix]

Ground beef consumption frequency reaches a peak for households with respondents age 35-44. Forty-two percent of these respondents indicated their households consumed ground beef products more than once a week, while only 33% of respondents in general did so.

5. Stew/Soup/Stir Fry Meats Consumption Demographics [Tables 2.4a-c, Appendix]

Stew meat consumption frequency is significantly higher among those with a high school education or less; 34% consume such beef products at least once a week while only 26% of the overall sample does so.

C. Restaurant Consumption of Beef Products

Respondents who consumed beef at least once a week were asked:

What percent of your consumption of beef products is associated with eating out at a restaurant?

Table 3: Percent of Beef Consumed Eating Out at a Restaurant

	Count	%
0%-20%	182	45.5%
21%-40%	85	21.3%
41%-60%	76	19.0%
61%-80%	36	9.0%
81%-100%	21	5.3%
Total Respondents	400	

While almost half of the respondents (46%) consume less than 20% of their beef at restaurants, a substantial minority, (33%) do eat 40% or more of their beef consumption at a restaurant.

Those 65 or older were far more likely to consume less than 20% of their beef at a restaurant than those younger, (62% vs. 42% for the rest).

D. Retail Outlets for At-Home Beef Consumption Purchases

1. Primary Source

Respondents who consumed beef at least once a week were asked:

Which of the following is your primary source for beef product purchases consumed at home? Grocery Store, Retail Meat Market/Local Butcher Shop, Farmer's Market, Direct-to-home sales, E-commerce purchases

- The overwhelming majority of respondents used a grocery store as a primary source of beef consumed at home.
- A significant minority (11%) used a Retail Meat Market/Local Butcher Shop as their primary source.

Table 4: Primary Source of Beef Consumed at Home

	Count	%
Grocery Store	339	84.8%
Retail Meat Market/Local Butcher Shop	43	10.8%
Farmer's Market	3	0.8%
Direct-to-home sales	6	1.5%
Family Farm	4	1.0%
Friend's Farm	2	0.5%
Half From Grocery, Half From Butcher	1	0.3%
Local Farmer	1	0.3%
Fast Food Restaurants	1	0.3%
Total Respondents	400	

Those 45 and over were more likely to report a retail meat market as their primary source of beef purchases than those under 45. About 14% of those over 45 indicated they used a retail meat market as their primary source while only 7% of those under 45 did (Table 4a, Appendix).

2. Sources of Beef Purchases for Consumption at Home in the Last 6 Months

As a follow-up to the question about the primary source of their beef purchases, respondents who had not mentioned one of the non-grocery store locations as the primary source were asked if they had purchased beef products at that type of location in the past 6 months.

Table 5: Percent of Respondents* Who Have Purchased Beef in the Last 6 Months

	Yes
Retail Meat Market/Local Butcher Shop	33.6%
Farmers Market	5.3%
Direct-To-Home Sales	3.6%
On the Web	0.0%

* asked of respondents who did indicate as a primary source

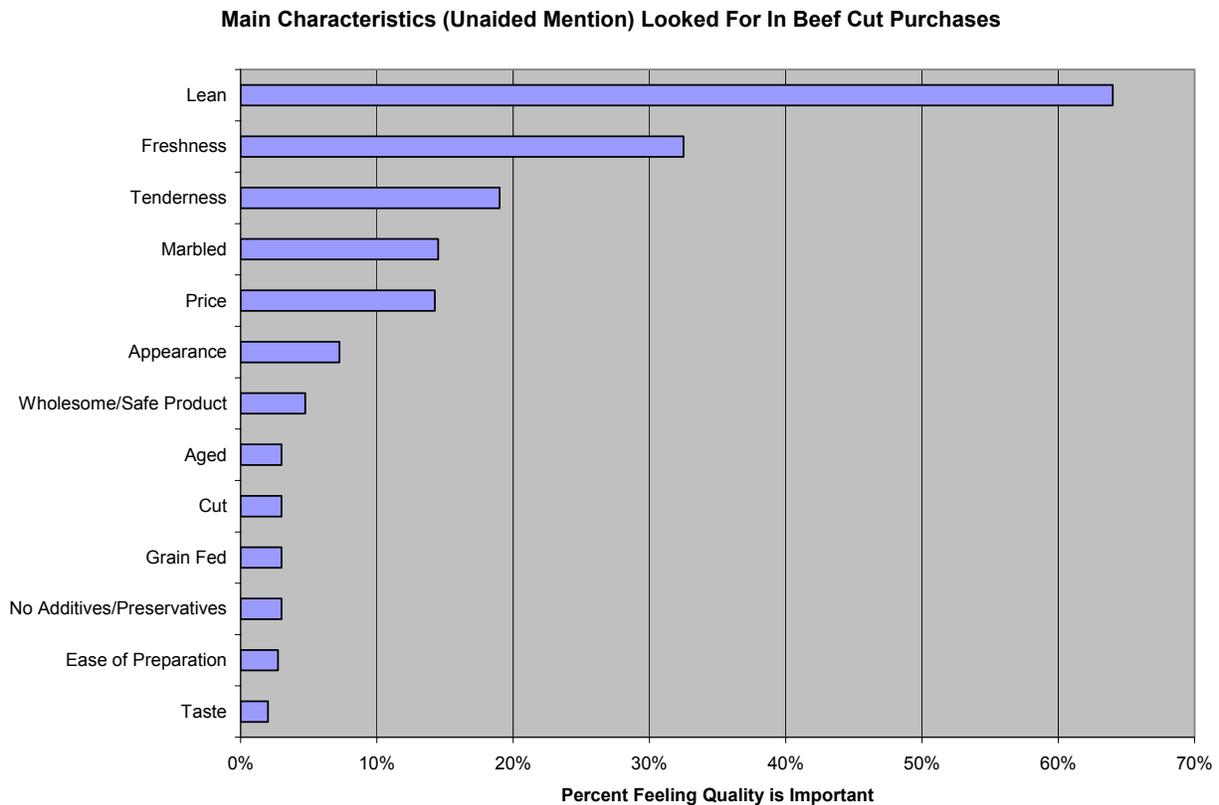
A significant number (34%) of respondents who had not used Retail Meat Markets as their primary source had purchased beef products there within the last 6

months. Far fewer had purchased beef at Farmers Markets (5%) or Direct to Home Sales. No sample respondent had purchased beef on the web.

E. Qualities Looked for In Beef Purchases

Thinking just of your beef cut purchases now, what are the qualities you look for in your beef cut purchases

- Leanness dominated the qualities looked for with 64% of respondents mentioning it (unaided). Freshness (32%) was a distant second (see chart below and Table 6 on next page).



There were few variations in characteristics looked for by demographics. Those 45-54 and those with incomes above \$110,000 were more likely to mention tenderness (48%) than respondents in general (33%) (see Tables 6a-c, Appendix).

Table 6: Characteristics Looked For In Beef Cut Purchases

	Count	%
Lean	256	64.0%
Freshness	130	32.5%
Tenderness	76	19.0%
Marbled	58	14.5%
Price	57	14.3%
Appearance	29	7.3%
Wholesome/Safe Product	19	4.8%
Aged	12	3.0%
Cut	12	3.0%
Grain Fed	12	3.0%
No Additives/Preservatives	12	3.0%
Ease of Preparation	11	2.8%
Taste	8	2.0%
Prime	7	1.8%
Type of Beef	7	1.8%
Low Fat	6	1.5%
No Hormones/Growth Promotants	6	1.5%
FDA Grade	5	1.3%
No Antibiotics	5	1.3%
Locally Raised	4	1.0%
Quality	4	1.0%
I Buy Good Meat	3	0.8%
Size	3	0.8%
Knowledge of Butcher	2	0.5%
On Sale	2	0.5%
Smell	2	0.5%
Texture	2	0.5%
Big Packages	1	0.3%
Buy From a Farm	1	0.3%
Clear Packaging	1	0.3%
Depends On Where I Shop	1	0.3%
Grass Fed	1	0.3%
Inspection	1	0.3%
No Packages	1	0.3%
Not a Lot of Bone	1	0.3%
Not Prime	1	0.3%
Organic	1	0.3%
Reputation and Reliability	1	0.3%
The Display	1	0.3%
Want Some Fat In Meat	1	0.3%
Total Respondents	400	

As a follow-up, respondents were specifically asked (for each characteristic):

On a 1 to 10 scale where 10 is very important and 1 is very unimportant please indicate how important each of the following characteristics is in your beef cut purchase decision.

The mean importance rating (on that 1 to 10 scale from very unimportant to very important) for characteristics is shown in the final column of Table 7 below. The importance rankings provide a slightly different picture than the unaided mention results.

- Freshness, Wholesome/Safe, Tender and Lean all have mean importance ratings substantially above other characteristics.
- Of interest, despite its low mean importance rating, 10% of respondents rated “Supplied by local family farms” at a 10 on the 1 to 10 scale.

Table 7: Importance of Various Characteristics of a Beef Cut

Importance of A Cut Being:	Very Unimportant										Mean
	1	2	3	4	5	6	7	8	9	10	
Fresh	1.3%	0.0%	0.0%	0.3%	1.5%	0.3%	3.5%	7.8%	11.5%	74.0%	9.41
A Wholesome/Safe Product	4.8%	1.0%	1.0%	0.3%	3.8%	1.8%	4.8%	9.0%	9.5%	64.3%	8.73
Tender	1.0%	0.5%	0.3%	0.5%	3.8%	3.0%	9.5%	22.3%	14.8%	44.5%	8.64
Lean	1.3%	0.0%	0.8%	1.3%	5.0%	3.5%	9.0%	17.8%	17.0%	44.5%	8.58
Easy to Prepare	5.5%	2.0%	2.8%	3.0%	17.8%	6.5%	13.3%	19.3%	7.5%	22.5%	6.97
No Additives/ Preservatives	11.8%	3.3%	4.5%	4.3%	15.5%	5.0%	9.5%	12.5%	6.5%	27.3%	6.54
No Hormones/ Growth Promotant	17.0%	4.5%	7.0%	3.3%	15.0%	3.3%	5.3%	9.0%	5.0%	30.8%	6.16
Marbled	12.0%	5.5%	6.0%	5.3%	15.5%	6.3%	11.0%	18.0%	7.5%	13.0%	5.96
Having No Antibiotics	21.5%	5.8%	6.3%	2.5%	16.8%	4.3%	5.5%	8.5%	4.3%	24.8%	5.63
Grain Fed	16.5%	7.5%	7.0%	3.8%	20.3%	4.5%	7.5%	14.3%	6.0%	12.8%	5.44
Aged	20.0%	8.8%	5.3%	3.0%	19.8%	5.5%	6.8%	11.3%	5.0%	14.8%	5.27
Supplied By Local Family Farms	24.3%	10.5%	7.0%	3.3%	19.5%	4.8%	7.8%	10.0%	3.0%	10.0%	4.67
Grass Fed	31.5%	11.3%	7.5%	4.3%	23.8%	3.3%	4.0%	6.8%	2.8%	5.0%	3.89

There were several significant demographic differences on mean importance rankings of beef cut characteristics.

- Those 55-64 gave leanness a slightly higher importance ranking (9.18) than those younger or older gave it (8.57).
- Those with a high school education or less ranked characteristics associated with tenderness (tenderness, aged, grain fed) higher on average than those with more education. They were also much more attracted to “supplied by local family farms” than those with higher education.
- Ease of preparation was also ranked higher on average by those with a high school education or less than those with more education.
- Those with households incomes under \$70,000 ranked “supplied by local family farm” higher on average than those with higher incomes.

Finally, thinking of beef cut characteristics, respondents were asked to choose which was the most important characteristic out of a list read to them of characteristics. The order of reading was rotated.

Here is a list of potential beef cut characteristics [Read List, Rotate Order]

Tenderness
Lean
Marbled
Aged
Grain Fed
Grass Fed
No antibiotics
No hormones
No additives/preservatives
Supplied by local family farms
Wholesome/safe product
Ease of preparation
Freshness

Please tell me which characteristic is the most important characteristic? Which is the second most important? Third most important?

Forced to choose in this manner, “freshness” was the most important characteristic by a margin of 2 to 1 over its nearest rival, “lean” (see Table 8). Characteristics were assigned a value of 3 to most important, 2 to second most important and 1 to third most important. The mean scores for freshness and lean were substantially higher than for the next two most important characteristics (Tenderness and Wholesome/Safe Products).

The clear implication is that a program to advertise Ohio Born and Raised should be closely linked to “Freshness”.

Table 8: Most Important Characteristics of a Beef Cut

	Most Important (3)	Second Most Important (2)	Third Most Important (1)	Mean
Freshness	128	80	0	1.36
Lean	69	87	93	1.19
Tenderness	30	68	90	0.79
Wholesome/Safe Product	66	27	0	0.63
No Hormones/Growth Promotants	38	32	22	0.50
Marbled	5	18	82	0.33
No Additives/Preservatives	19	17	29	0.30
No Antibiotics	16	19	24	0.28
Grain Fed	8	22	25	0.23
Ease of Preparation	9	15	0	0.14
Locally Raised	8	7	0	0.10
Aged	3	7	14	0.09
Grass Fed	1	1	4	0.02
Total Respondents	400			

F. Attraction to Phrase “Ohio Born and Raised”

To initial test attraction to the phrase “Ohio Born and Raised” respondents were asked:

If you saw a beef product that was advertised with the phrase “Ohio Born and Raised Beef” would you be (rotate order)?

More attracted than otherwise

Less attracted than otherwise

Neither more or less attracted than otherwise

- Just over half of the respondents, 51%, were “more attracted than otherwise” to beef products advertised with the phrase **“Ohio Born and Raised”**.

**Table 9: Attractiveness of the Phrase
“Ohio Born and Raised Beef”**

	Count	%
More attracted than otherwise	205	51.3%
Less attracted than otherwise	5	1.3%
Neither more or less attracted than otherwise	190	47.5%
Total Respondents	400	

- Attraction to the phrase was greater for those younger than 65 than to those older, (see Table 9a, Appendix).
- Attraction was somewhat higher for those with household incomes, \$90,000 to \$110,000 than for those with more or less household income.

As a follow-up, respondents were asked why they would be more or less attracted than they would otherwise be.

- Those who were more attracted were primarily interested in supporting local farmers (63%) or in high quality/freshness (25%) (see Table 10, next page).
- Those who were indifferent or were less attracted primarily indicated that beef was the same wherever it came from.

Table 10: Why Respondent Feels That Way

	Count	%
<i>Those Responding "More Attracted"</i>		
Buying it would supporting the local economy and farmers	130	63.4%
Animals are clean and well treated	4	2.0%
Doesn't matter where the beef comes from	6	2.9%
High quality and freshness	51	24.9%
Organic	4	2.0%
Depends on price	1	0.5%
Miscellaneous	3	1.5%
None/I don't know	6	2.9%
Total	205	
<i>Those Responding "Less Attracted"</i>		
Doesn't matter where the beef comes from	3	60.0%
Miscellaneous	1	20.0%
None/I don't know	1	20.0%
Total	5	
<i>Those Responding "Neither More or Less Attracted"</i>		
Buying it would supporting the local economy and farmers	6	3.2%
Animals are clean and well treated	2	1.1%
Doesn't matter where the beef comes from	137	72.1%
High quality and freshness	13	6.8%
Organic	1	0.5%
Depends on price	8	4.2%
Good reputation and reliability	1	0.5%
Miscellaneous	8	4.2%
None/I don't know	14	7.4%
Total	190	

G. Similarity Between "Locally Born and Raised" and "Ohio Born and Raised"

Respondents were asked:

Would you say that the two phrases "locally born and raised" and "Ohio born and raised" are very different, somewhat different, somewhat similar, very similar?

- Almost three quarter of respondents (74%) felt they were "somewhat" or "very similar".

Table 11: Difference Between "Locally Born and Raised" and "Ohio Born and Raised"

	Count	%
Very Different	28	7.0%
Somewhat Different	76	19.0%
Somewhat Similar	175	43.8%
Very Similar	121	30.3%

There was no significant variation by age, education or income, (see Tables 11a-c, Appendix).

The small group of respondents who felt the phrases were “somewhat” or “very different” were asked:

Which of the following statements would more closely represent your views: [Rotate Order of Asking]

“Locally born and raised” would have a more positive impact than “Ohio born and raised” on my beef product purchase decision

“Ohio born and raised” would have a more positive impact than “locally born and raised” on my beef product purchase decision

About 61% of this small group indicated “locally born and raised” would have a more positive impact.

Table 12: Phrase that would have most positive impact on my Beef Purchases:

	Count	%
Locally Born and Raised	63	60.6%
Ohio Born and Raised	41	39.4%
Total Respondents	104	

* asked of those who viewed the phrases differently

H. Characteristics It Would Be Important To Have Associated With the Phrase “Ohio Born and Raised”

As an intro to the set of questions on location and price premium, respondents were asked:

Thinking of a beef cut with the characteristic that the cattle were born on Ohio farms, raised by Ohio farmers and processed by Ohio meat processors what other characteristics of a beef cut would it be important to have associated with that? [Do not read, check all that apply, Probe, anything else?]

Not surprisingly, the characteristics that respondents had indicated were most important to them, “Fresh” and “Lean” dominated the list, (see Table 13, next page). Of more interest, however, Wholesome/Safe Product, No Hormones/Growth Promotants and No Additives/Preservatives also were mentioned by a substantial minority of people.

Table 13: Characteristics Important to have Associated with Beef Cuts from Ohio Farms

	Count	%
Fresh	130	32.5%
Lean	124	31.0%
Tender	79	19.8%
Wholesome/Safe Product	50	12.5%
No Hormones/Growth Promotants	46	11.5%
No Additives/Preservatives	34	8.5%
Grain Fed	33	8.3%
No Antibiotics	20	5.0%
Price	17	4.3%
Ease of Preparation	13	3.3%
Grass Fed	12	3.0%
Marbled	10	2.5%
Supplied by Local Family Farms	10	2.5%
Inspection/USDA Approved	8	2.0%
Aged	7	1.8%
Healthy/Lean/Low fat	6	1.5%
Quality	6	1.5%
Appearance	4	1.0%
Organic/All Natural	4	1.0%
Flavor	3	0.8%
Grade of Meat	3	0.8%
How the Cattle Is Raised	3	0.8%
Cleanliness	2	0.5%
Packaging	2	0.5%
Angus Products Preferred	1	0.3%
Can Be Purchased From Butcher	1	0.3%
Everything is Important	1	0.3%
Kentucky Products are Better	1	0.3%
Ohio Born and Raised is Enough	1	0.3%
Satisfaction Gauranteed	1	0.3%
Size	1	0.3%
Supported by a Quality Store	1	0.3%
Thickness	1	0.3%
Traceable by a Computer	1	0.3%
Type of Cut	1	0.3%
We Buy From the Fair Because All of the Meat is Tested	1	0.3%
Total Respondents	400	

I. Retail Outlets where “Ohio Born and Raised” Expected

Respondents were asked:

Assume that beef cuts that were Ohio Born and Raised with the characteristics you've suggested were available, in what type of retail outlet would you expect to find it? [Do Not Read, Check all that are indicated]

Grocery Store

Retail Meat Market/Local Butcher Shop

Farmer's Market

Direct-to-home Sales

E-commerce

Other, Clarify type of establishment if unclear _____

- Two thirds of respondents (66%) did expect to find such beef cuts available in the grocery store
- Another 44% expected to find them in a retail meat market/local butcher shop.
- Only 10% expected to find it in a farmer's market.

J. Price Differentials

Respondents were randomly assigned to one of four price differential categories (20%, 30%, 40% and 50%) (so that there were 100 respondents in each category) and asked the following:

Assume that beef products that were Ohio Born and Raised with the characteristics you've just suggested [list characteristics mentioned in Q17] were available, would you be willing to pay [20,30,40,50]% more than you currently pay? [Sample will be randomly assigned one of these starting values]

- At a price differential of 20% for Ohio Born and Raised beef cuts with the desired characteristics, 39% of those asked would be willing to pay that high a differential.
- Not surprisingly the percent willing to pay a differential falls as the price differential rises.
- Even at a price differential of 40%-50%, somewhere between 14% to 19% of the sample is willing to purchase Ohio Born and Raised beef cuts if they have the characteristics they felt were important.

Table 15: Willing to Pay Price Differential of ___%

Price Differential	% Saying they would purchase	Sample Size
20%	39%	100
30%	29%	100
40%	14%	100
50%	19%	100

As a follow-up, those in each group who had indicated they would not pay that particular price premium were asked about a price premium 10% lower, while those who indicated they would pay that price premium were asked about a price premium 10% higher (see Table 15a).

The results reinforce the initial conclusions on price premium. For example, looking at the sample of respondents who initially were asked about a 30% price premium, 29 of the 100 indicated they would pay a 30% differential and another 13 indicated they would pay a 20% differential. This implies 42% would pay at least a price differential of 20% which agrees closely with the result of 39% from the sample of those who were asked initially about a 20% price premium.

Table 15A : Willing to Pay Price Differential of ___%: As follow-up

Initial Price Premium Proposed	Follow-Up Price Premium Proposed	Number Indicating Yes to Paying Price Premium	Total Sample	Number Indicating Yes as percent of Sample
120%	110%	29	61	47.5%
	120%	39	100	39.0%
	130%	13	39	33.3%
130%	120%	13	71	18.3%
	130%	29	100	29.0%
	140%	4	29	13.8%
140%	130%	4	86	4.7%
	140%	14	100	14.0%
	150%	7	14	50.0%
150%	140%	3	81	3.7%
	150%	19	100	19.0%
	160%	4	19	21.1%

K. Phrase that Best Captures Ohio Born and Raised Idea

Respondents were asked:

Thinking of a beef product with the characteristic that the cattle were born on Ohio farms, raised by Ohio farmers and processed by Ohio meat processors what phrase would you suggest best captures that idea?

While many people had suggestions, several suggestions cropped up more than once (see full list in Appendix). Several themes played out on Ohio. A few respondents tried to play on the Buckeye theme.

Table 16: Most Frequent Phrases That Best Captures Ohio Idea

Phrase	Count
Ohio Born And Raised	15
Born And Raised In Ohio	10
Homegrown	10
Ohio Beef	7
Locally Raised	5
Buckeye Beef	4
Locally Born And Raised	4
Locally Raised And Processed	4
Ohio Born And Bred	4
Ohio Raised	4
Raised By Ohio Farmers	4
Good Meat	3
Ohio Grown	3
Born And Bred In Ohio	2
Buy OHIO	2
Ohio Born	2
Ohio Meat	2
Ohio Pride	2
None/Have No Idea	167

Note: See Appendix for Full List

IV. CONCLUSION

A. Beef characteristics that would be important to have associated in the consumer's mind with "Ohio Born and Raised Beef".

Several characteristics are of critical importance to consumers when thinking about beef cuts in general and then when thinking specifically about Ohio Born and Raised Beef.

"Freshness" had the highest mean importance ranking for beef cut characteristics and was chosen as the "most important" characteristic by twice as many respondents as the next characteristic "Lean". These two characteristics also headed the list of characteristics it was important for Ohio born and raised beef to have.

There was a strong emphasis among consumers on the beef cut being “Wholesome/Safe”. Of interest, this characteristic and other elements of Safeness (No Hormones/Growth Promotants, No Additives, No Antibiotics) become more prominent when one asks specifically for characteristics it would be important to have associated with Ohio beef.

B. Appropriate Themes to Include in a Marketing Campaign

While it is clear that “Freshness” could easily be associated with Ohio Born and Raised Beef as a strong theme, (see above) those more attracted to beef if it had an Ohio association were more often concentrated on the local economic impact. Among the 50% of respondents who indicated they would be more attracted to beef with the “Ohio Born and Raised” logo, 66% indicated it was because buying it would support the local economy and farmers. Only a quarter initially indicated they would be more attracted because of higher quality and freshness.

C. The Appropriate Retail Outlets to Target

Most respondents purchased their beef in grocery stores (as a primary source). As a consequence, it’s not surprising a strong majority (66%) expected to see Ohio Born and Raised Beef there. In addition, despite only 11% using a Retail Meat Market/Local Butcher Shop as their primary outlet (another 33% had gone in the last 6 months), 45% indicated they would expect to see “Ohio Born and Raised Beef” offered there. Only a small number focused on farmers’ markets (10%), and very few mentioned other alternatives.

D. Characteristics of consumers who would be interested in beef labeled “Ohio Born and Raised Beef”

Attraction to beef labeled “Ohio Born and Raised” was greater for those younger than 65 and for those with household incomes, \$90,000 to \$110,000. These demographic characteristics are of some interest but there was significant attraction across all demographic groups.

E. The Price Differential Sustainable for Beef Labeled “Ohio Born and Raised Beef”

If “Ohio Born and Raised Beef can be coupled with the critical characteristics of “Freshness” and Wholesome/Safe”, there is the definite potential to charge a sustainable price differential of 20% and still achieve significant market penetration. An estimated 40% of respondents in the higher income households surveys suggested they might purchase at that price differential. Interest falls off substantially at price premiums of 40 to 50%.

APPENDIX A

Survey Questionnaire

Ohio Department of Agriculture Draft Beef Purchase Survey

1. Hello, I'm _____ from the University of Dayton Center for Business and Economic Research. We are conducting a survey on beef purchase patterns. Could I speak to the

(Skip Q6 if Q5 answer is b)

6. In the past 6 months have you purchased beef products at a Retail Meat Market/Local Butcher Shop?

Yes
No

(Skip Q7 if Q5 answer is c)

7. In the past 6 months have you purchased beef products at a Farmer's Market?

Yes
No

(Skip Q8 if Q5 answer is d)

8. In the past 6 months have you purchased beef products through a Direct-to-home sales?

Yes
No

(Skip Q9 if Q5 answer is e)

9. In the past 6 months have you purchased beef products on the Web?

Yes
No

10. Thinking just of your beef cut purchases now, what are the qualities you look for in your beef cut purchases **[Do Not Read, Check all that apply, Prompt with: Anything else?]** **If they say “Good Quality”** Ask what are the characteristics that make for good quality?

Tenderness
Lean
Marbled
Aged
Grain Fed
Grass Fed
No antibiotics
No hormones/ growth promotants
No additives/preservatives
Locally raised
Wholesome/safe product
Ease of preparation
Freshness
Other **[Please Specify]**

11. On a 1 to 10 scale where 10 is very important and 1 is very unimportant please indicate how important each of the following characteristics is in your beef cut purchase decision **[Rotate order of asking]**

Tenderness
Lean
Wholesome/safe
Marbled
Aged
Grain Fed
Grass Fed
No antibiotics
No hormones/ growth promotant
No additives/preservatives
Supplied by local family farms
Wholesome/safe product
Ease of preparation
Freshness

12. Here is a list of potential beef cut characteristics [Read List, Rotate Order]

Tenderness
Lean
Marbled
Aged
Grain Fed
Grass Fed
No antibiotics
No hormones
No additives/preservatives
Supplied by local family farms
Wholesome/safe product
Ease of preparation
Freshness

Please tell me which characteristic is the most important characteristic? Which is the second most important? Third most important?

13. If you saw a beef product that was advertised with the phrase “Ohio Born and Raised Beef” would you be (rotate order)

More attracted than otherwise
Less attracted than otherwise
Neither more or less attracted than otherwise

14. Why would you be (fill in above answer) to this type of beef? [**Probe for important expected characteristics**]_____

15. Would you say that the two phrases “locally born and raised” and “Ohio born and raised” are very different, somewhat different, somewhat similar, very similar.

Ask Q16 if Q15 is “very different” or “somewhat different”

16. Which of the following statements would more closely represent your views: [**Rotate Order of Asking**]

“Locally born and raised” would have a more positive impact than “Ohio born and raised” on my beef product purchase decision
“Ohio born and raised” would have a more positive impact than “locally born and raised” on my beef product purchase decision

17. Thinking of a beef cut with the characteristic that the cattle were born on Ohio farms, raised by Ohio farmers and processed by Ohio meat processors what other characteristics of a beef cut would it be important to have associated with that? **[Do not read, check all that apply, Probe, anything else?]**

Tenderness

Lean

Marbled

Aged

Grain Fed

Grass Fed

No antibiotics

No hormones/ growth promotant

No additives/preservatives

Supplied by local family farms

Wholesome/safe product

Ease of preparation

Freshness

Other, Please Specify _____

18. Assume that beef products that were Ohio Born and Raised with the characteristics you've just suggested [list characteristics mentioned in Q17] were available, would you be willing to pay [20,30,40,50]% more than you currently pay? [Sample will be randomly assigned one of these starting values]

Yes

No **[Skip to Q20]**

19. Would you be willing to pay [amount will be Q18 amount + 10%] more than you currently pay?

Yes

No

[Skip to Q21]

20. Would you be willing to pay [amount will be Q18 amount - 10%] more than you currently pay?

Yes

No

~~21. Assume that beef cuts that were Ohio Born and Raised with the characteristics you've suggested were available, in what type of retail outlet would you expect to find it? [Do Not Read, Check all that are indicated]~~

Grocery Store

Retail Meat Market/Local Butcher Shop

Farmer's Market

Direct-to-home Sales

E-commerce

Other, Clarify type of establishment if unclear _____

22. Thinking of a beef product with the characteristic that the cattle were born on Ohio farms, raised by Ohio farmers and processed by Ohio meat processors what phrase would you suggest best captures that idea?

23. Which of the following best describes your age

Less than 25

24-34

35-44

45-54

55-64

65 and up

Refused [Do not Read]

24. What is highest level of education you have achieved?

Less than high school

High school graduate

Some College

College Graduate

Post college advanced graduate degree

25. In which of the following categories would you place your household income

Under \$70,000

\$70,000-\$90,000

\$90,000-\$110,000

\$110,000 and up

Refused [Do not Read]

26. Record Gender

Thank you for your time, your comments will be very helpful to Ohio beef producers.

APPENDIX B

Appendix Tables

Table 1A: Times Per Month Beef is Consumer in Household by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Less Than Once a Month	2 3.8%	5 4.6%	6 5.2%	3 5.5%	2 2.9%	3 4.2%	21 4.4%
Once or Twice a Month	4 7.5%	11 10.1%	13 11.2%	2 3.6%	12 17.4%	10 14.1%	52 11.0%
Once a Week	20 37.7%	35 32.1%	34 29.3%	24 43.6%	20 29.0%	22 31.0%	155 32.8%
More Tthan Once a Week	27 50.9%	58 53.2%	63 54.3%	26 47.3%	35 50.7%	36 50.7%	245 51.8%
Total	53	109	116	55	69	71	473

Table 1B: Times Per Month Beef is Consumed In Household by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Less Than Once a Month	3 3.0%	6 5.8%	6 3.8%	6 5.4%	21 4.4%
Once or Twice a Month	13 12.9%	11 10.7%	17 10.8%	11 9.8%	52 11.0%
Once a Week	34 33.7%	31 30.1%	59 37.6%	31 27.7%	155 32.8%
More Tthan Once a Week	51 50.5%	55 53.4%	75 47.8%	64 57.1%	245 51.8%
Total	101	103	157	112	473

Table 1C: Times Per Month Beef is Consumed In Household by Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Less Than Once a Month	7 4.6%	2 2.3%	3 4.6%	4 4.3%	5 6.5%	21 4.4%
Once or Twice a Month	20 13.2%	7 8.0%	6 9.2%	11 12.0%	8 10.4%	52 11.0%
Once a Week	45	30	27	25	28	155

Table 2.1B: Steak Consumption Per Month In Household by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Less Than Once a Month	18 21.2%	20 23.3%	26 19.4%	10 10.5%	74 18.5%
Once or Twice a Month	42 49.4%	33 38.4%	71 53.0%	59 62.1%	205 51.3%
Once a Week	20 23.5%	21 24.4%	31 23.1%	26 27.4%	98 24.5%
More Tthan Once a Week	5 5.9%	12 14.0%	6 4.5%		23 5.8%
Total	85	86	134	95	400

Table 2.1C: Steak Consumption Per Month In Household by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Less Than Once a Month	31 25.0%	15 19.0%	6 10.7%	8 10.4%	14 21.9%	74 18.5%
Once or Twice a Month	58 46.8%	42 53.2%	38 67.9%	41 53.2%	26 40.6%	205 51.3%
Once a Week	26 21.0%	19 24.1%	9 16.1%	24 31.2%	20 31.3%	98 24.5%
More Tthan Once a Week	9 7.3%	3 3.8%	3 5.4%	4 5.2%	4 6.3%	23 5.8%
Total	124	79	56	77	64	400

Table 2.2A: Roast Consumption Per Month In Household by Age

	Age					Total	
	<34	35-44	45-54	55-64	65+		Refused
Less Than Once a Month	14 29.8%	21 22.6%	26 26.8%	19 38.0%	17 30.9%	18 31.0%	115 28.8%
Once or Twice a Month	27 57.4%	60 64.5%	62 63.9%	26 52.0%	27 49.1%	29 50.0%	231 57.8%
Once a Week	5 10.6%	10 10.8%	8 8.2%	5 10.0%	9 16.4%	10 17.2%	47 11.8%
More Tthan Once a Week	1 2.1%	2 2.2%	1 1.0%		2 3.6%	1 1.7%	7 1.8%
Total	47	93	97	50	55	58	400

Table 2.2B: Roast Consumption Per Month In Household by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Less Than Once a Month	23 27.1%	25 29.1%	35 26.1%	32 33.7%	115 28.8%
Once or Twice a Month	46 54.1%	50 58.1%	82 61.2%	53 55.8%	231 57.8%
Once a Week	13 15.3%	11 12.8%	14 10.4%	9 9.5%	47 11.8%
More Tthan Once a Week	3 3.5%		3 2.2%	1 1.1%	7 1.8%
Total	85	86	134	95	400

Table 2.2C: Roast Consumption Per Month In Household by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Less Than Once a Month	24 19.4%	21 26.6%	20 35.7%	26 33.8%	24 37.5%	115 28.8%
Once or Twice a Month	80 64.5%	50 63.3%	26 46.4%	44 57.1%	31 48.4%	231 57.8%
Once a Week	16 12.9%	7 8.9%	10 17.9%	6 7.8%	8 12.5%	47 11.8%
More Tthan Once a Week	4 3.2%	1 1.3%		1 1.3%	1 1.6%	7 1.8%
Total	124	79	56	77	64	400

Table 2.3A: Ground Beef Consumption Per Month In Household by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Less Than Once a Month	2 4.3%	1 1.1%	4 4.1%	2 4.0%	2 3.6%	1 1.7%	12 3.0%
Once or Twice a Month	7 14.9%	15 16.1%	20 20.6%	15 30.0%	17 30.9%	13 22.4%	87 21.8%
Once a Week	25 53.2%	38 40.9%	43 44.3%	21 42.0%	20 36.4%	20 34.5%	167 41.8%
More Tthan Once a Week	13 27.7%	39 41.9%	30 30.9%	12 24.0%	16 29.1%	24 41.4%	134 33.5%
Total	47	93	97	50	55	58	400

Table 2.3B: Ground Beef Consumption Per Month In Household by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Less Than Once a Month		2	8	2	12
		2.3%	6.0%	2.1%	3.0%
Once or Twice a Month	17	21	28	21	87
	20.0%	24.4%	20.9%	22.1%	21.8%
Once a Week	41	31	56	39	167
	48.2%	36.0%	41.8%	41.1%	41.8%
More Tthan Once a Week	27	32	42	33	134
	31.8%	37.2%	31.3%	34.7%	33.5%
Total	85	86	134	95	400

Table 2.3C: Ground Beef Consumption Per Month In Household by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Less Than Once a Month	6		3	2	1	12
	4.8%		5.4%	2.6%	1.6%	3.0%
Once or Twice a Month	20	16	11	22	18	87
	16.1%	20.3%	19.6%	28.6%	28.1%	21.8%
Once a Week	50	41	20	29	27	167
	40.3%	51.9%	35.7%	37.7%	42.2%	41.8%
More Tthan Once a Week	48	22	22	24	18	134
	38.7%	27.8%	39.3%	31.2%	28.1%	33.5%
Total	124	79	56	77	64	400

Table 2.4A: Stew/Soup/Stir-Fry Meats Consumption Per Month In Household by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Less Than Once a Month	12	31	19	16	15	14	107
	25.5%	33.3%	19.6%	32.0%	27.3%	24.1%	26.8%
Once or Twice a Month	24	33	55	18	23	32	185
	51.1%	35.5%	56.7%	36.0%	41.8%	55.2%	46.3%
Once a Week	10	22	21	13	15	9	90
	21.3%	23.7%	21.6%	26.0%	27.3%	15.5%	22.5%
More Tthan Once a Week	1	7	2	3	2	3	18
	2.1%	7.5%	2.1%	6.0%	3.6%	5.2%	4.5%
Total	47	93	97	50	55	58	400

Table 2.4B: Stew/Soup/Stir-Fry Meats Consumption Per Month In Household by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Less Than Once a Month	23 27.1%	24 27.9%	33 24.6%	27 28.4%	107 26.8%
Once or Twice a Month	33 38.8%	43 50.0%	66 49.3%	43 45.3%	185 46.3%
Once a Week	23 27.1%	17 19.8%	30 22.4%	20 21.1%	90 22.5%
More Tthan Once a Week	6 7.1%	2 2.3%	5 3.7%	5 5.3%	18 4.5%
Total	85	86	134	95	400

Table 2.4C: Stew/Soup/Stir-Fry Meats Consumption Per Month In Household by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Less Than Once a Month	33 26.6%	16 20.3%	15 26.8%	22 28.6%	21 32.8%	107 26.8%
Once or Twice a Month	60 48.4%	46 58.2%	25 44.6%	32 41.6%	22 34.4%	185 46.3%
Once a Week	27 21.8%	14 17.7%	14 25.0%	17 22.1%	18 28.1%	90 22.5%
More Tthan Once a Week	4 3.2%	3 3.8%	2 3.6%	6 7.8%	3 4.7%	18 4.5%
Total	100	100	100	100	100	400

Table 3A: Percentage of Beef Consumed Eating Out at Restaurant by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
0%-20%	19 40.4%	38 40.9%	40 41.2%	22 44.0%	34 61.8%	29 50.0%	182 45.5%
21%-40%	9 19.1%	28 30.1%	21 21.6%	9 18.0%	7 12.7%	11 19.0%	85 21.3%
41%-60%	10 21.3%	13 14.0%	23 23.7%	12 24.0%	10 18.2%	8 13.8%	76 19.0%
61%-80%	5 10.6%	9 9.7%	9 9.3%	5 10.0%	2 3.6%	6 10.3%	36 9.0%
81%-100%	4 8.5%	5 5.4%	4 4.1%	2 4.0%	2 3.6%	4 6.9%	21 5.3%
Total	47	93	97	50	55	58	400

Table 3B: Percentage of Beef Consumed Eating Out at Restaurant by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
0%-20%	45	42	56	39	182
	52.9%	48.8%	41.8%	41.1%	45.5%
21%-40%	16	13	32	24	85
	18.8%	15.1%	23.9%	25.3%	21.3%
41%-60%	14	16	28	18	76
	16.5%	18.6%	20.9%	18.9%	19.0%
61%-80%	3	8	14	11	36
	3.5%	9.3%	10.4%	11.6%	9.0%
81%-100%	7	7	4	3	21
	8.2%	8.1%	3.0%	3.2%	5.3%
Total	85	86	134	95	400

Table 3C: Percentage of Beef Consumed Eating Out at Restaurant by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
0%-20%	55	37	28	29	33	182
	44.4%	46.8%	50.0%	37.7%	51.6%	45.5%
21%-40%	25	19	11	20	10	85
	20.2%	24.1%	19.6%	26.0%	15.6%	21.3%
41%-60%	26	13	8	19	10	76
	21.0%	16.5%	14.3%	24.7%	15.6%	19.0%
61%-80%	9	9	6	6	6	36
	7.3%	11.4%	10.7%	7.8%	9.4%	9.0%
81%-100%	9	1	3	3	5	21

Table 4A: Primary Source of Beef Consumed at Home by Age

	Age					Refused	Total
	<34	35-44	45-54	55-64	65+		
Grocery Store	42	81	78	41	44	53	339
	89.4%	87.1%	80.4%	82.0%	80.0%	91.4%	84.8%
Retail Meat Market/Local Butcher Shop	5	6	13	7	8	4	43
	10.6%	6.5%	13.4%	14.0%	14.5%	6.9%	10.8%
Farmer's Market			2		1		3
			2.1%		1.8%		.8%
Direct-to-Home Sales		4	1		1		6
		4.3%	1.0%		1.8%		1.5%
Other		2	3	2	1	1	9
		2.2%	3.1%	4.0%	1.8%	1.7%	2.3%
Total	47	93	97	50	55	58	400

Table 4B: Primary Source of Beef Consumed at Home by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Grocery Store	71 83.5%	71 82.6%	114 85.1%	83 87.4%	339 84.8%
Retail Meat Market/Local Butcher Shop	10 11.8%	8 9.3%	18 13.4%	7 7.4%	43 10.8%
Farmer's Market		2 2.3%	1 .7%		3 .8%
Direct-to-Home Sales	1 1.2%	1 1.2%	1 .7%	3 3.2%	6 1.5%
Other	3 3.5%	4 4.7%		2 2.1%	9 2.3%
Total	85	86	134	95	400

Table 4C: Primary Source of Beef Consumed at Home by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Grocery Store	108 87.1%	65 82.3%	49 87.5%	63 81.8%	54 84.4%	339 84.8%
Retail Meat Market/Local Butcher Shop	14 11.3%	8 10.1%	5 8.9%	7 9.1%	9 14.1%	43 10.8%
Farmer's Market				3 3.9%		3 .8%
Direct-to-Home Sales		2 2.5%	1 1.8%	3 3.9%		6 1.5%
Other	2 1.6%	4 5.1%	1 1.8%	1 1.3%	1 1.6%	9 2.3%
Total	124	79	56	77	64	400

Table 5.1A: Respondents Purchasing Beef in a Meat Market/Butcher Shop by Age

	Age					Refused	Total
	<34	35-44	45-54	55-64	65+		
Yes	15 35.7%	37 42.5%	31 36.9%	5 11.6%	16 34.0%	16 29.6%	120 33.6%
No	27 64.3%	50 57.5%	53 63.1%	38 88.4%	31 66.0%	38 70.4%	237 66.4%
Total	42	87	84	43	47	54	357

Table 5.1B: Respondents Purchasing Beef in a Meat Market/Butcher Shop by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Yes	26 34.7%	29 37.2%	37 31.9%	28 31.8%	120 33.6%
No	49 65.3%	49 62.8%	79 68.1%	60 68.2%	237 66.4%
Total	75	78	116	88	357

Table 5.1C: Respondents Purchasing Beef in a Meat Market/Butcher Shop by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Yes	38 34.5%	20 28.2%	13 25.5%	37 52.9%	12 21.8%	120 33.6%
No	72 65.5%	51 71.8%	38 74.5%	33 47.1%	43 78.2%	237 66.4%
Total	110	71	51	70	55	357

Table 5.2A: Respondents Purchasing Beef at a Farmers Market by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Yes	2 4.3%	7 7.5%	7 7.4%	1 2.0%	1 1.9%	3 5.2%	21 5.3%
No	45 95.7%	86 92.5%	88 92.6%	49 98.0%	53 98.1%	55 94.8%	376 94.7%
Total	47	93	95	50	54	58	397

Table 5.2B: Respondents Purchasing Beef at a Farmers Market by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Yes	3 3.5%	1 1.2%	11 8.3%	6 6.3%	21 5.3%
No	82 96.5%	83 98.8%	122 91.7%	89 93.7%	376 94.7%
Total	85	84	133	95	397

Table 5.2C: Respondents Purchasing Beef at a Farmers Market by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Yes	8 6.5%	4 5.1%	3 5.4%	3 4.1%	3 4.7%	21 5.3%
No	116 93.5%	75 94.9%	53 94.6%	71 95.9%	61 95.3%	376 94.7%
Total	124	79	56	74	64	397

Table 5.3A: Respondents Purchasing Beef Through a Direct-To-Home Sales by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Yes	1 2.1%	5 5.6%	3 3.1%	1 2.0%	1 1.9%	3 5.2%	14 3.6%
No	46 97.9%	84 94.4%	93 96.9%	49 98.0%	53 98.1%	55 94.8%	380 96.4%
Total	47	89	96	50	54	58	394

Table 5.3B: Respondents Purchasing Beef Through a Direct-To-Home Sales by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Yes		2 2.4%	7 5.3%	5 5.4%	14 3.6%
No	84 100.0%	83 97.6%	126 94.7%	87 94.6%	380 96.4%
Total	84	85	133	92	394

Table 5.3C: Respondents Purchasing Beef Through a Direct-To-Home Sales by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Yes	5 4.0%	5 6.5%	3 5.5%	1 1.4%		14 3.6%
No	119 96.0%	72 93.5%	52 94.5%	73 98.6%	64 100.0%	380 96.4%
Total	124	77	55	74	64	394

Table 6A: Characteristics Looked For In Beef Cut Purchases by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Lean	28	58	64	33	35	38	256
	59.6%	62.4%	66.0%	66.0%	63.6%	65.5%	64.0%
Freshness	15	27	47	13	13	15	130
	31.9%	29.0%	48.5%	26.0%	23.6%	25.9%	32.5%
Tenderness	12	15	18	6	13	12	76
	25.5%	16.1%	18.6%	12.0%	23.6%	20.7%	19.0%
Marbled	7	17	12	9	6	7	58
	14.9%	18.3%	12.4%	18.0%	10.9%	12.1%	14.5%
Price	11	18	8	5	9	6	57
	23.4%	19.4%	8.2%	10.0%	16.4%	10.3%	14.3%
Miscellaneous	4	6	17	10	10	4	51
	8.5%	6.5%	17.5%	20.0%	18.2%	6.9%	12.8%
Appearance	4	9	5	2	4	5	29
	8.5%	9.7%	5.2%	4.0%	7.3%	8.6%	7.3%
Wholesome/safe product	2	3	7	4	2	1	19
	4.3%	3.2%	7.2%	8.0%	3.6%	1.7%	4.8%
Aged	1	2	5	3	1		12
	2.1%	2.2%	5.2%	6.0%	1.8%		3.0%
Grain Fed	1	4	5	1	1		12
	2.1%	4.3%	5.2%	2.0%	1.8%		3.0%
No additives/preservatives	1	1	3	5		2	12
	2.1%	1.1%	3.1%	10.0%		3.4%	3.0%
Ease of preparation		4	4	2	1		11
		4.3%	4.1%	4.0%	1.8%		2.8%
No hormones/ growth promotants			4	2			6
			4.1%	4.0%			1.5%
No antibiotics			3	1		1	5
			3.1%	2.0%		1.7%	1.3%
Locally raised	1		1	1		1	4
	2.1%		1.0%	2.0%		1.7%	1.0%
No Response		1				1	2
		1.1%				1.7%	.5%
Grass Fed		1					1
		1.1%					.3%

Table 6B: Characteristics Looked For In Beef Cut Purchases by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Lean	55	52	89	60	256
	64.7%	60.5%	66.4%	63.2%	64.0%
Freshness	28	26	36	40	130
	32.9%	30.2%	26.9%	42.1%	32.5%
Tenderness	19	14	24	19	76
	22.4%	16.3%	17.9%	20.0%	19.0%
Marbled	13	14	19	12	58
	15.3%	16.3%	14.2%	12.6%	14.5%
Price	9	14	24	10	57
	10.6%	16.3%	17.9%	10.5%	14.3%
Miscellaneous	9	11	20	11	51
	10.6%	12.8%	14.9%	11.6%	12.8%
Appearance	6	6	11	6	29
	7.1%	7.0%	8.2%	6.3%	7.3%
Wholesome/safe product	3	1	9	6	19
	3.5%	1.2%	6.7%	6.3%	4.8%
Aged	1	3	3	5	12
	1.2%	3.5%	2.2%	5.3%	3.0%
Grain Fed	2	2	4	4	12
	2.4%	2.3%	3.0%	4.2%	3.0%
No additives/preservatives	2	2	5	3	12
	2.4%	2.3%	3.7%	3.2%	3.0%
Ease of preparation	2	1	3	5	11
	2.4%	1.2%	2.2%	5.3%	2.8%
No hormones/ growth promotants	1	1	1	3	6
	1.2%	1.2%	.7%	3.2%	1.5%
No antibiotics	1		1	3	5
	1.2%		.7%	3.2%	1.3%
Locally raised	1	2	1		4
	1.2%	2.3%	.7%		1.0%
No Response			1	1	2
			.7%	1.1%	.5%
Grass Fed	1				1
	1.2%				.3%

Table 6C: Characteristics Looked For In Beef Cut Purchases by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Lean	78 62.9%	57 72.2%	36 64.3%	43 55.8%	42 65.6%	256 64.0%
Freshness	31 25.0%	21 26.6%	16 28.6%	37 48.1%	25 39.1%	130 32.5%
Tenderness	25 20.2%	12 15.2%	12 21.4%	13 16.9%	14 21.9%	76 19.0%
Marbled	15 12.1%	11 13.9%	6 10.7%	15 19.5%	11 17.2%	58 14.5%
Price	23 18.5%	12 15.2%	10 17.9%	6 7.8%	6 9.4%	57 14.3%
Miscellaneous	17 13.7%	11 13.9%	2 3.6%	14 18.2%	7 10.9%	51 12.8%
Appearance	7 5.6%	6 7.6%	4 7.1%	5 6.5%	7 10.9%	29 7.3%
Wholesome/safe product	7 5.6%	2 2.5%	5 8.9%	3 3.9%	2 3.1%	19 4.8%
Aged	2 1.6%	4 5.1%		4 5.2%	2 3.1%	12 3.0%
Grain Fed	6 4.8%	3 3.8%		2 2.6%	1 1.6%	12 3.0%
No additives/preservatives	4 3.2%	1 1.3%	2 3.6%	2 2.6%	3 4.7%	12 3.0%
Ease of preparation	4 3.2%		4 7.1%	3 3.9%		11 2.8%
No hormones/ growth promotants	2 1.6%		2 3.6%	2 2.6%		6 1.5%
No antibiotics	2 1.6%		1 1.8%	1 1.3%	1 1.6%	5 1.3%
Locally raised	3 2.4%	1 1.3%				4 1.0%
No Response				1 1.3%	1 1.6%	2 .5%
Grass Fed	1 .8%					1 .3%

Table 7A: Importance of Various Characteristics of a Beef Cut by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Tenderness	8.45	8.40	8.64	8.80	8.98	8.71	8.64
Lean	8.15	8.38	8.64	9.18	8.58	8.60	8.57
Marbled	5.36	5.90	6.37	6.28	5.82	5.67	5.96
Aged	4.66	5.10	5.53	5.04	5.64	5.45	5.27
Grain Fed	5.15	5.37	5.56	5.52	5.75	5.22	5.44
Grass Fed	3.94	4.14	3.74	4.10	3.71	3.66	3.89
No Antibiotics	5.74	5.02	5.80	6.32	5.55	5.72	5.63
No Hormones/Growth	6.09	5.86	6.26	6.60	6.16	6.14	6.16
No	5.85	6.16	6.71	7.20	6.53	6.84	6.54
Supplied by Local Family	4.91	4.34	4.69	4.86	4.58	4.84	4.67
Wholesome/Safe Product	9.00	8.54	8.99	8.80	8.40	8.66	8.73
Ease of Preparation	6.96	7.19	6.76	6.66	7.56	6.66	6.97
Freshness	9.45	9.23	9.58	9.52	9.35	9.38	9.41

Table 7B: Importance of Various Characteristics of a Beef Cut by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Tenderness	9.20	8.80	8.47	8.22	8.64
Lean	8.96	8.71	8.46	8.26	8.57
Marbled	6.25	6.36	5.76	5.60	5.96
Aged	5.86	5.56	5.19	4.58	5.27
Grain Fed	6.80	5.44	5.33	4.37	5.44
Grass Fed	4.56	3.74	3.82	3.49	3.89
No Antibiotics	6.73	5.55	5.43	5.01	5.63
No Hormones/Growth	7.06	6.22	6.05	5.44	6.16
No	7.19	6.90	6.24	6.05	6.54
Supplied by Local Family	5.59	4.99	4.81	3.35	4.67
Wholesome/Safe Product	8.75	8.90	8.71	8.60	8.73
Ease of Preparation	7.93	7.07	6.45	6.75	6.97
Freshness	9.41	9.38	9.42	9.43	9.41

Table 7C: Importance of Various Characteristics of a Beef Cut by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Tenderness	8.45	8.96	8.66	8.60	8.63	8.64
Lean	8.33	9.01	8.79	8.26	8.70	8.57
Marbled	5.99	5.48	5.55	6.35	6.34	5.96
Aged	5.44	5.29	4.43	5.18	5.75	5.27
Grain Fed	5.63	5.61	4.79	5.12	5.81	5.44
Grass Fed	4.04	4.09	3.63	3.38	4.17	3.89
No Antibiotics	5.78	5.68	5.50	5.17	5.95	5.63
No Hormones/Growth	6.26	5.95	6.63	5.61	6.47	6.16
No	6.65	6.41	7.00	6.00	6.73	6.54
Supplied by Local Family	5.47	4.46	4.27	3.57	5.03	4.67
Wholesome/Safe Product	8.42	9.03	9.18	8.81	8.50	8.73
Ease of Preparation	7.24	7.16	6.91	6.38	6.95	6.97
Freshness	9.23	9.51	9.52	9.52	9.44	9.41

Table 9A: Attractiveness of the Phrase "Ohio Born and Raised" by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
More Attracted Than Otherwise	27 57.4%	47 50.5%	54 55.7%	29 58.0%	24 43.6%	24 41.4%	205 51.3%
Less Attracted Than Otherwise	2 4.3%	1 1.1%				2 3.4%	5 1.3%
Neither More or Less Attracted Than Otherwise	18 38.3%	45 48.4%	43 44.3%	21 42.0%	31 56.4%	32 55.2%	190 47.5%
Total	47	93	97	50	55	58	400

Table 9B: Attractiveness of the Phrase "Ohio Born and Raised" by Education"

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
More Attracted Than Otherwise	45 52.9%	43 50.0%	74 55.2%	43 45.3%	205 51.3%
Less Attracted Than Otherwise	1 1.2%	1 1.2%	3 2.2%		5 1.3%
Neither More or Less Attracted Than Otherwise	39 45.9%	42 48.8%	57 42.5%	52 54.7%	190 47.5%
Total	85	86	134	95	400

Table 9C: Attractiveness of the Phrase "Ohio Born and Raised" by Household Income"

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
More Attracted Than Otherwise	63 50.8%	44 55.7%	34 60.7%	35 45.5%	29 45.3%	205 51.3%
Less Attracted Than Otherwise	2 1.6%	1 1.3%		2 2.6%		5 1.3%
Neither More or Less Attracted Than Otherwise	59 47.6%	34 43.0%	22 39.3%	40 51.9%	35 54.7%	190 47.5%
Total	124	79	56	77	64	400

**Table 10A: Why Respondent is _____ to phrase
"Ohio Born and Raised Beef"**

Respondents Who Would Be "More Attracted Than Otherwise"

Around here we probably do get homegrown beef but I don't know.
As long as it's good meat it doesn't have to come from Ohio.
Because at the grocery store they don't identify.
Because I buy beef out of Utah.
Because I don't know how to compare it to Idaho or Dakota.
Because I don't think where it's raised is important.
Because I like the Ohio. Anything we can use from Ohio is important.
Because I like to support the local economy.
Because I like to support the local person.
Because I tend to like Ohio grown things.
Because I tried to support local economies.
Because I would be supporting my community.
Because I would like to buy from Ohio because it would be more apt to be fresh. It is packed and sold quicker.
Because I would think it is fresher than others.
Because I would think that because I am in Ohio it would be a little fresher and because of Ohio it would be a little more organic.
Because I would think that it was better quality then if it were shipped in from somewhere.
Because I'm a buckeye, I support Ohio business.
Because I'm from here and the animals here are safer.
Because I'm from Ohio.
Because I'm going to buy something, I prefer to buy from someone I know, or someone close by.
Because it does not indicate the qualities looked for in beef, like wholesome or tender.
Because it doesn't matter where they are raised than what it looks like compared to other products and the quality like no hormones additives or preservatives.
Because it doesn't really matter where it's raised.
Because it is local which means it will be inspected locally.
Because it is local.
Because it is local.
Because it is more local.
Because it really doesn't matter to me as long as it is good meat, I don't care where it came from.
Because it really doesn't matter to me as long as it was produced in the USA.
Because it seemed safer.
Because it was raised around here doesn't mean anything.
Because it's in Ohio.
Because it's local within the state and you'd be more inclined to buy from local farmers.
Because it's locally grown.
Because its grown locally and supports the locally economy of farmers.
Because it's in the state and home grown
Because of freshness, processed in Ohio.
Because of grass or grain fed, that does not make more safer.
Because of the Ohio name on it
Because Ohio is good, good steak and a lot of dairy.
Because Ohio raises some pretty good beef.
Because she would know where it is from.

Because the fact that it's Ohio doesn't tell me much of anything except that it didn't have to travel very far. It doesn't mean too much to me.

Because the lands in Ohio are good for raising beef.

Because then it wouldn't have to be shipped in from an unknown place.

Because there are factory farms in Ohio. I want to know where it is from in Ohio just because it is from Ohio doesn't mean it was clean.

Because we are supporting our own community.

Because with the speed that they transport things today it really doesn't matter.

Because you're supporting your local farmers.

Being in Ohio and having Ohio right here, I would go for that.

Buy local.

Chances are it is fresher because it is local. It helps our local farmers.

Could get it quicker after it was butchered. I live on a farm, so I could know the person who had the cattle, it would be more obtainable.

Depends on the meat.

Doesn't matter.

Doesn't really matter to me.

Doesn't matter

Doesn't matter.

Eat stuff that is from Ohio, and keep the farmers in Ohio working.

From beef growing state, support farmers.

Good to buy things for local businesses.

Homegrown

I believe in trying to help the area that I live in.

I buy at Kroger's.

I buy my meat at the exact same store every week, and I like to see the butcher, I don't know where it comes from, it is not that important to me.

I buy whatever's there.

I don't know. It is not something I think about.

I don't know what advantage there would be for it to be raised in Ohio rather than another state.

I don't know why it would be better. We like to buy local products, things made in Ohio. But if they had meat on sale I am not going to care where it is from.

I don't know. We don't know where our beef is raised now or where it's from. We have no idea.

I don't make distinction between Ohio or United States beef.

I don't pay much attention to it, not better or less because it was from Ohio.

I don't think of Ohio as being a beef state.

I don't care where it comes from.

I don't care where it comes from.

I don't care where it comes from; I just hope that it's all good.

I don't feel like I need to contribute to one state over the other.

I don't have a preference.

I don't know really.

I don't know that being raised in Ohio that the meat is any better or worse than if it came from somewhere else.

I don't know that it makes a big difference. Plus, you don't know how the animal was raised, meaning abused or in an unsafe area.

I don't know what it means, whether it means better tasting, no chemicals, I just don't understand.

I don't know. It just wouldn't matter to me.

I don't pay attention to where it's raised.

I don't really consider where it's raised when I buy meat.

I don't think it is important that it is from right here. Because it is refrigerated. If it is graded and passes the inspection then it doesn't matter where it is from.
I guess it's just because I don't understand why what was in Ohio would be better than anywhere else. I don't know enough about the different states.
I have had no problem with any beef.
I just don't know if things are raised better here then somewhere else.
I just don't ever think of Ohio as a big beef state so it isn't that important to me.
I just think we have a good atmosphere for raising cattle.
I know it might be more grain fed and less hormones.
I know it would be fresh.
I know Ohio beef has to be good. I've lived all over the country.
I know that it was raised in Ohio and should be fresh.
I like to buy Ohio products.
I like to help the local people.
I like to support local business.
I like to support Ohio.
I like to support the local economy.
I like to support the local economy.
I live in Ohio and want to support that.
I look more for cost.
I look more for the quality, you know the freshness, the fat content and stuff like that, even if it was in Ohio and didn't have those qualities, it wouldn't matter.
I love anything from Ohio.
I really don't have any point of reference, I am sure they are probably good.
I tend to eat Colorado beef or Iowa beef.
I think it is fresher, it got to me quicker.
I think it would be fresher.
I want to support the local farmers.
I would be attracted to how fresh and lean it was, and the price.
I would be more looking for what I like in a cut of meat.
I would like to support our local economy.
I would like to support the local industry and local farmers.
I would want to see the product anyway.
I would want to support my state.
I wouldn't be influenced either way.
I'm a buckeye.
If grocery bought the meat and it was from a state associated with beef then I would buy it. Not from overseas.
If I have other factors that would enter in like cost or ease of preparation, those factors override where it comes from. Advertising wouldn't affect me.
If it looks good then it is ok I guess and it does not matter.
If it's local I feel it's not a conglomerate.
If they done it right.
if they raised it good it would be better
I'm a native of Ohio.
It came from somewhere near us in the state.
It depends on the price. If the price were the same I would want the Ohio born meat.
It doesn't matter if it is from Ohio or not.
It doesn't make it any better a product.
It doesn't matter

It doesn't matter to me.
It doesn't matter where it comes from.
It doesn't matter where it comes from. As long as its quality beef.
It doesn't matter.
It doesn't matter.
It doesn't mean it is any fresher.
It doesn't really matter as long as the price is good.
It doesn't really matter to me where the meat was raised.
It doesn't really matter whether it was from Ohio or not.
It doesn't really matter, I guess.
It is from Ohio, and hopefully it is fairly locally raised. Freshness, where we live, I respect the companies.
It would be at market a little faster.
It would be fresher than something shipped from Mexico.
It would be from a local meat producer.
It's from Ohio.
It's our home place. I'd rather support my local farmers.
It's right in your state.
It's the quality.
Its human nature to have a comfort level when you know it is from close to home.
It's keeping the homegrown for Ohio, and the sales for Ohio.
It's not something that I find important. I look for the U.S. instead of just a state. I don't concern myself with a state as long as it is U.S. made.
It's the quality of the product. If it was Ohio and it had all the safety regulations I would take it but if it didn't I wouldn't.
Just because I know it came from around here, supporting our local farmers.
Just because I live in Ohio. To me that seems fresher.
Just because it's grown here in Ohio.
Just because it's in Ohio doesn't mean anything.
Just because it's raised in Ohio doesn't mean it's good meat.
Just because their Ohio and I'm Ohio.
Just because you feel that you should support your home product.
Just nice to know it came from one of the farms from the state I live.
Just not important.
Just wanting to support local farmers.
Keeping local farmers in business.
Learned to buy it.
Local
Mainly because its from Ohio, it would be locally grown, I would know more about the farms and where it came from.
Most beef doesn't come from Ohio.
No interest of where the beef comes from.
None
Ohio beef isn't any better than others.
Ohio has good meat products and it's fresh.
Ohio is mainly a heartland for farmers so they seem to be more careful. Also, because I was raised on a farm so I know the quality Ohio farmers use.

Ohio raised beef isn't any other raised beef.
Only because it is from Ohio or another state as long as other things are met, such as freshness.
Other than the fact that it might be fresher, it's probably the same.
Perception of freshness.
Proximity and Ohio.
Supporting of local industries, and it doesn't have as far to travel.
Supporting the community.
That alone wouldn't interest me.
That it came from Ohio.
The fact that it was locally raised appeals to me.
The more important thing is whether the quality is good, not where it comes from.
The quality rather than where it's from.
There are other things that are more important rather than where it was raised.
To me it doesn't matter where it comes from, as long as it is okay meat.
To support local farmers.
To support the state
Umm, it would be fresher.
We don't eat that much meat.
We eat fast food all the time.
Well I'm in Ohio. I was just out west and I didn't care for what I saw out there as far as cattle being raised. It looked liked they were very, very dirty. I've seen better in Ohio.
Well, figuring that it was raised locally that there would be no hormones or antibiotics.
Well, I guess it depends on what it looks like; Ohio raised does not make it good or bad.
Well, I live in Ohio and if I was lucky it was raised close to me.
Well, I'm not impressed with commercials.
Well, it's all going to be as fresh where ever it comes from, because they get it to the store quickly, as long as it's fresh I don't care where it comes from.
Well, kind of promotes your own local growers, I don't know.
What difference does it make, where it comes from.
Where it comes from doesn't matter.
You would feel like you are helping your neighbors, and because of its location, you might feel like it was fresher.
Respondents Who Would Be "Less Attracted Than Otherwise"
Because it's local.
I like to support our farmers in Ohio, since we live here.
I wouldn't know if the butcher didn't tell me.
My grandfather used to raise beef cattle, if it was a big super farm I would question it more, we know what good cattle is without additives.
Organic
Respondents Who Would Be Neither More Attracted or Less Attracted Than Otherwise"
A beef cow is a beef cow.
A cow from Ohio is not necessarily better than one from Iowa.
Assuming it's fresher.
Because as long as it is a good product I don't care where it came from.
Because good beef is raised everywhere.
Because I am in Ohio, keeps business here.
Because I believe in buying locally and it will be fresher and I would be more confident in buying this product.
Because I believe in loyalty to local farmers and producers.

Because I cannot always believe what I read.
Because I care about the product, not where it comes from.
Because I don't think the taste would change.
Because I don't give a lot of thought to it. I buy the cheapest.
Because I don't look at where it's from rather other characteristics.
Because I guess I am not looking at that instead of getting a safe product. It could be Ohio born but not be safe.
Because I know a lot of Ohio farmers. It would have come less distance and someone locally would benefit from the purchase.
Because I like to do my business at home.
Because I live in Ohio.
Because I really don't care where the beef comes from. I want United States beef, but the state is not important.
Because I think that Ohio is a good beef country.
Because I want to support the state I live in, you have more control over it.
Because I would assume that the quality of Ohio would not be any better than a Kansas raised beef.
Because I would be more inclined to think it was fresh and not overly processed, I would feel better about it locally grown, I would not like imported meat.
Because if it grown with a lot of additives in Ohio, who cares? If it's fresh in Ohio than I would definitely want it.
Because I'm not looking to see where it's raised; I'm looking for the product.
Because it advertises where it was made homegrown.
Because it basically comes off of a menu and I don't shop for it.
Because it does not matter where it is raised to me.
Because it is coming from the state I live in.
Because it is raised in Ohio.
Because it was from Ohio.
Because it was from the state we are in. It would still have to be fresh.
Because it would be local and not from far away.
Because it would be local.
Because it would be locally grown and I would be supporting people in our area and I could actually go and check and see how it was raised and the farmer's reputation.
Because it would have to travel to get to me. It would seem to be fresher because it didn't come from across the county.
Because it's all the same.
Because it's from here in Ohio.
Because it's from here.
Because it's from Ohio.
Because it's probably fresher.
Because it's born and raised in Ohio.
Because it's in Ohio.
Because it's likely to be fresher and less travel time.
because of its locally raised
Because of proximity, I would assume it is fresher than some that came out of state.
Because of the advertising. I have eaten Ohio beef and it didn't taste any better than anything else.
Because she doesn't know of any reason that it would make it more attractive.
Because they are inspected in same way.
Because we raise beef.
Been to Ohio State Fair, and I really like the beef there because they are well taken care of.
Better chance of being fresh.
Doesn't have any impact on quality.
Doesn't matter

Doesn't matter.
Don't know
Feel like I would support people I might know. Also might be fresher.
First of all it was bred here, we support our own state.
Food is food.
For my local area, and he would associate it with freshness.
Geography matters relatively not very much.
Hopefully if its Ohio bred and raised, it would be fresher, less transportation involved.
I am hoping that it was raised well.
I am Ohio-born and bred and I will favor Ohio when purchasing beef.
I believe it might be fresher.
I came from Minnesota on a farm back there, so I would want to support them.
I care how fresh it is and how much fat is in it, and I don't care whether it came from Pennsylvania. I just see how it looks.
I consider that local and that is important to me.
I don't associate Ohio with high quality beef.
I don't care about the name.
I don't care as long as the beef is tender and fresh.
I don't know that it matters to me which state that it comes from. I care more that it is safe and not hormone injected.
I don't know which, only trust Fischer Foods Meats.
I don't know, I look at the meet, I don't care where it came from.
I don't know.
I don't know.
I don't like where the cow comes from.
I don't think about where it comes from.
I don't think Ohio beef is worth the price.
I don't care where the cows live, a cow is a cow whether he lives, whether in Kansas or Ohio.
I don't really care about that.
I don't really know if that is important.
I don't really know what benefits.
I don't think it makes much of a difference.
I don't think most of it is grown around here. It is mostly shipped in
I don't think where its raised is the most important I think how its raised is the most important.
I go to my neighborhood butcher and I buy whatever he has.
I grew up on a farm.
I guess living in Ohio were close to Kentucky and Indiana it wouldn't make a difference if it came from them.
I just care about the safeness. It really doesn't matter if it comes from Ohio or not.
I know it is more local then if it was from Argentina or somewhere else.
I know that we have a lot of quality beef here in Ohio, and I want to support the state.
I know the area and I know it hasn't been shipped a long area.
I know they are corn fed and good beef.
I like to buy home products.
I like to buy local if I can.
I like to buy things from local people because they're my neighbors.
I like to keep my business at home; I like to deal who are within the state.
I like to support local people.
I like to support Ohio.
I like to support the local farmers.

I like to support.
I live here and I want to support the state.
I look at price, it attracts me more.
I look at the meat as opposed to where it's from.
I love Ohio.
I need it organic so it doesn't matter where it is raised.
I shop for meat at one place, so ads do not attract me.
I think I am more attracted to what looks good and fresh, color and lean.
I think it would be more of a perception then a fact but I would think that it would be fresher.
I think that Ohio has good and bad beef; I am not familiar if they raise good or bad beef, and I am not familiar where the good beef comes from.
I think the local farms are excellent and should be supported.
I think we live in a small area and most of the beef is from Ohio anyways.
I usually go to places where I trust what they have.
I want to know who's selling it and the price means something.
I would be satisfied that something was raised locally.
I would figure that it didn't take long to get here, we are near a lot of farms, it would be fresher.
I would just have to try the product and see how it compares. Exactly where it came from wouldn't matter.
I would look more for the price.
I would rather buy local if I have a choice.
I would think it would be fresh and clean and safe.
I'm just a price shopper. It would just depend on what I'm looking for and the price.
I'd rather buy within the state or the area. Support our local producers.
I'm a home state girl. I believe in buying locally, supporting anything I can to support my own area.
I'm not really concerned where it's raised, I've never really thought about it.
Is more near my house.
It comes from my home state and that is something to look for.
It comes from Ohio anyways, so who cares?
It didn't have to travel as far too get to me.
It does not really matter where it comes from.
It doesn't matter at all.
It doesn't matter if it's been here in Ohio or not, as long as it's fresh from somewhere else.
It doesn't matter to me.
It doesn't matter to me.
It doesn't matter.
It doesn't matter.
It doesn't matter where it comes from.
It doesn't matter.
It doesn't matter.
it doesnt really matter to me.
It doesn't really matter.
It is Ohio and I'm an Ohioan, freshness should be a little better.
It is the state I live in.
It really doesn't matter much that it's Ohio.
It would be fresher.
It wouldn't make that much difference to me because I'm buying the product because, if that product is available and it is good then I'll buy it.
It wouldn't take so long to get to the point where I'm purchasing it.

It's beef.
It's home grown.
It's local.
It's not important where it comes from.
It's pretty much the same; I would say.
It's just as good as someone else's.
Its local.
Just because I like to support Ohio stuff, if I can.
Just because it's one of those things we don't look at.
Keeping within the community.
Little more sure of where it came from. Fresher.
No reason.
None
None
None
None
not big deal wants only good quality one
Not relevant to me.
Price is critical, it just depends, I'm not going to buy it if it's just Ohio.
Really don't care where it comes from.
Spend money locally.
Support local town as much as possible, fresher.
Support my neighbors.
Support Ohio farmers.
Support state farmers.
Support the local economy.
Support the state you live in, the meat does not have to be shipped far, and you keep people working.
Support your local farmer.
That it was closer and didn't take as long to get here and so it would be safer and fresher. I would try it if it had a sign on it.
The idea is that you think they are fresh because they are raised in Ohio.
The quality of beef wouldn't be any different.
To keep the local farmers in business.
To support the local economy and you know where the beef has been.
To support the local economy.
To support the local economy.
To support the people in the area.
We really don't buy any of our meat from the grocery store. We always purchase our beef from the county fair so that pretty much lasts us the whole year.
Well I'm from the west coast and I'm living in Ohio. A guy from Texas to Ohio, its got 4 legs.
Where it's grown doesn't make a difference.
Whether it's Ohio or Indiana or Idaho it makes no difference as long as it's in the country.
Whether they gave free range to the animals or not.
Wouldn't even think about it.
You have an idea of what it was fed. Safety.
You know it's coming from someplace locally and you are supporting the local economy.

Table 11A: Difference Between "Locally Born and Raised" and "Ohio Born and Raised" by Age

Table 11B: Difference Between "Locally Born and Raised" and "Ohio Born and Raised" by Education

	Level of Education				Total
	High School	Some College	Bachelor's	Post College Advanced	
Very Different	11	4	2	6	23
Somewhat Different	23	14	8	17	62
Somewhat Similar	59	37	29	31	156
Very Similar	31	24	17	23	95
Total	124	79	56	77	336

Table 11C: Difference Between "Locally Born and Raised" and "Ohio Born and Raised" by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Very Different	11	4	2	6	5	28
Somewhat Different	23	14	8	17	14	76
Somewhat Similar	59	37	29	31	19	175
Very Similar	31	24	17	23	26	121
Total	124	79	56	77	64	400

Table 12A: Phrase That Would Have Most Positive Impact on My Beef Purchases by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Locally Born and Raised	8 88.9%	19 67.9%	14 53.8%	5 35.7%	7 53.8%	10 71.4%	63 60.6%
Ohio Born and Raised	1 11.1%	9 32.1%	12 46.2%	9 64.3%	6 46.2%	4 28.6%	41 39.4%
Total	9	28	26	14	13	14	104

Table 12B: Phrase That Would Have Most Positive Impact on My Beef Purchases by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Locally Born and Raised	15 71.4%	16 64.0%	18 58.1%	14 51.9%	63 60.6%
Ohio Born and Raised	6 28.6%	9 36.0%	13 41.9%	13 48.1%	41 39.4%
Total	21	25	31	27	104

Table 12C: Phrase That Would Have Most Positive Impact on My Beef Purchases by Household Incomes

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Locally Born and Raised	24 70.6%	14 77.8%	6 60.0%	10 43.5%	9 47.4%	63 60.6%
Ohio Born and Raised	10 29.4%	4 22.2%	4 40.0%	13 56.5%	10 52.6%	41 39.4%
Total	34	18	10	23	19	104

Table 14A: Retail Outlets At Which Ohio Born and Raised Beef Is Expected to be Found by Age

	Age						Total
	<34	35-44	45-54	55-64	65+	Refused	
Grocery Store	26 55.3%	59 63.4%	54 55.7%	31 62.0%	35 63.6%	35 60.3%	240 60.0%
Retail Meat Market/Local Butcher Shop	16 34.0%	24 25.8%	36 37.1%	17 34.0%	16 29.1%	21 36.2%	130 32.5%
Farmer's Market	3 6.4%	7 7.5%	4 4.1%	1 2.0%	3 5.5%	2 3.4%	20 5.0%
Direct-to-home Sales		2 2.2%			1 1.8%		3 .8%
Other	2 4.3%	1 1.1%	3 3.1%	1 2.0%			7 1.8%
Total	47	93	97	50	55	58	400

Table 14B: Retail Outlets At Which Ohio Born and Raised Beef Is Expected to be Found by Education

	Level of Education				Total
	High School or Less	Some College	College Graduate	Post College Advanced Graduate Degree	
Grocery Store	54 63.5%	56 65.1%	73 54.5%	57 60.0%	240 60.0%
Retail Meat Market/Local Butcher Shop	27 31.8%	25 29.1%	44 32.8%	34 35.8%	130 32.5%
Farmer's Market	2 2.4%	3 3.5%	11 8.2%	4 4.2%	20 5.0%
Direct-to-home Sales		2 2.3%	1 .7%		3 .8%
Other	2 2.4%		5 3.7%		7 1.8%
Total	85	86	134	95	400

Table 14C: Retail Outlets At Which Ohio Born and Raised Beef Is Expected to be Found by Household Income

	Household Income					Total
	Under \$70,000	\$70,000-\$90,000	\$90,000-\$110,000	\$110,000 and Up	Refused	
Grocery Store	71 57.3%	40 50.6%	41 73.2%	46 59.7%	42 65.6%	240 60.0%
Retail Meat Market/Local Butcher Shop	37 29.8%	33 41.8%	14 25.0%	26 33.8%	20 31.3%	130 32.5%
Farmer's Market	11 8.9%	4 5.1%	1 1.8%	3 3.9%	1 1.6%	20 5.0%
Direct-to-home Sales	1 .8%	1 1.3%		1 1.3%		3 .8%
Other	4 3.2%	1 1.3%		1 1.3%	1 1.6%	7 1.8%
Total	124	79	56	77	64	400

Table 16A: Phrase That Best Captures Ohio Idea

Count	Phrase
	100% Ohio Beef
	98% Fat Free
	A Fresh Quality Product That Supports Local Farmers
	A Product Of Ohio
	Again Probably More Leaning Toward Freshness And Not A Lot Of Shipping Involved
	Beef Cattle Products Raised In Ohio
2	Born And Bred In Ohio
	Born And Raised And Packaged In Ohio
10	Born And Raised In Ohio
1	Born Fresh In Ohio
1	Born In Ohio, For Ohioans
	Born On Ohio Farms
	Born, Raised And Processed By Ohio Quality Farmers
	Born, Raised, And Butchered In Ohio
	Bred In Ohio
4	Buckeye Beef
	Buckeye Bred
	Buckeye Bred Beef
	Buckeye Bulls
2	Buy OHIO
	Buy Ohio
	Buy Ohio Beef. Support Your Local Farmer
	Buy Ohio, Ohio's Best Beef
	Buy Our Beef...It's The Best
	Buy The Best From Your Local Farm
	Cattle Heart Of Ohio
	Close To Home And Heart
	Eat Ohio Beef
	Eat What Ohio Produces
	Emphasize That It Came From Ohio Farms
	Excellent
	Fresh And Pure
	Fresh And Wholesome
	Fresh Local Beef
	From Ohio For Ohioans
	From Ohio.
	From The Heart Of It All
3	Good Meat
	Good Quality, Locally Bred Meat
	Grow Red White And Blue Cow! I Don't Know
	Grown Locally To Be Eaten Locally
	Having To Do With Local
	Healthy And Homegrown
	Healthy Food Begins With Home
	Here Your Home Town Butcher
	Home Grown And Natural

	Home Grown And Ohio Grown!
	Home Grown Beef
	Home Grown!
10	Homegrown
	Homegrown Born And Bred
	Homemade
	Hometown Raised
	I Don't Know, But Maybe, I Think Amish, More Local Markets Seem Amish.
	I Don't Want To Know That The Steak Was Butchered Down The Street. So A Particular Advertisement Does Not Appeal To Me At All.
	I Think It's Great
	I Would Think They Were Safe
	I Wouldn't Have Any Idea.
	I'm Not Really Sure
	If It Had A Certain Name On It, Like Raised In Ohio
	Integrity
	It Is Local And Fresh
	It Might Be A Little Bit More Fresh
	It Should Be Advertised That Ohio Performed All Those Actions.
	It Would Be Important To Emphasize That It Was From Ohio, Not Necessarily Local. Advertising Local Can Be Misleading Information.
	Its From Ohio
	Just Saying That It Is From There. Just Get It Across That There Is No Additives Or Hormones Adding To The Flavor And Leanness.
	Just That It Is An Ohio Product
	Less Chance Of Having Anything Wrong With It
	Local
	Local Beef More Tender And Safe
	Local Farmers
	Local Grow
	Local!
	Locally
	Locally And Ohio Home Grown!
4	Locally Born And Raised
	Locally Born And Raised Because That Means Close To Us
	Locally Bred And Raised
	Locally Grown And Processed
	Locally Grown Locally Fed
	Locally Owned And Produced
5	Locally Raised
	Locally Raised And Preserved
	Locally Raised As Opposed To Otherwise Something Along Those Lines
4	Locally Raised And Processed
	Neighborhood Beef
7	Ohio Beef
	Ohio Beef Is Best.
	Ohio Beef Is The Best
2	Ohio Born

4	Ohio Born And Bred
15	Ohio Born And Raised
	Ohio Born And Raised And Killed.
	Ohio Born And Raised And Processed I Just Expect It To Say What It Is
	Ohio BORN And RAISED!!
	Ohio Born Bred And Processed.
	Ohio Born, Breed, And Processed
	Ohio Bread And Processed
	Ohio Bred
	Ohio Bred And Fed
	Ohio Bred And Processed
	Ohio Bred And Raised
	Ohio Bred Beef
	Ohio Cattle
	Ohio Cows
	Ohio Farmers
	Ohio Fed And Processed
	Ohio Good
3	Ohio Grown
	Ohio Makes Beef Better.
2	Ohio Meat
2	Ohio Pride
	Ohio Pride Or Ohio Proud
4	Ohio Raised
	Ohio Raised And Processed
	Ohio Raised And Pure
	Ohio Raised Cattle
	Ohio Raised Distributed And Praised Buy The Public
	Ohio Something, Ohio Raised And I Don't Know.
	Ohio's Best
	Ohio-Raised
	On Sale
	Only In Ohio
	Only Ohio Raised Quality Beef
	Organic Beef The Best Beef Ohio Has To Offer
	Organic In The Phrase, Or No Additives.
	Organic Ohio Beef
	People Should Know That They Would Be Getting Fresh And Safe Beef
	Processed By Ohio
	Quality
	Quality Meat Of Ohio
	Raised And Bred Home
	Raised And Processed In Ohio
	Raised And Sold In Ohio
	Raised At Home
	Raised By And For Ohio.
4	Raised By Ohio Farmers
	Raised By Your Neighbors

	Raised In Ohio
	Raised In Ohio Would Be Important
	Raised On Ohio Farms
	Raised On Ohio Farms
	Raised On Ohio Farms
	Safe For Your Family
	Something Like Ohio Grown
	Something That Had To Do With Fresh And Tender And Special
	Someway That It Would Be Known As Ohio Grown
	Stay United!
	Support Your Local Beef
	Support Your Local Business
	That's Hard. I Think The Locally Sounds Better Than Just Ohio. If You Are From Here It Keeps Business Local.
	The Best Come From The Home State.
	The Local Idea
	The Special Beef Product Raised And Bred In Ohio On Local Farms Would Be Important
	The Third Is The Best
	The Way It Was Described, That Long Of A Phrase, You Don't Want To Leave Anything Out. Repeat What You Said.
	The Wholesome, Fresh, High Quality, Tender Meat.
	Totally Ohio
	Use The Characteristics
	Very Nice Things.
	What's Round On The Ends And Lean In The Middle.
	You Should Support Your Local Farmers!
167	None/Have No Idea

