Foodservice Quality: Phases I & II
Quantitative survey and qualitative activities evaluating quality in foodservice

February 2016
Presentation
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1. Introduction

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Recent Meals
Objectives

Marketing Objectives

• Identify the key associations, attributes, and descriptions that Millennials use to define “high quality” beef.
  • Explore functional and emotional indicators in beef and foodservice images
  • Measure the influence of descriptors, preparation and cooking methods, and beef cuts
  • Compare descriptors as drivers of choice between proteins
  • Foodservice menu evaluation and ethnographic feedback

• Ultimately, the Beef Checkoff aims to understand how consumers define quality to better equip operators with ways to stand out from the competition, drive patronage, and drive beef consumption.

Research Objectives

• Demographic criteria for qualified respondents:
  • Aged 20-34
  • Do not avoid eating beef
  • Eat beef at least once a month
  • Have recently eaten in a restaurant
2. Defining Quality

Quality in Their Words
Image Associations
Preparation & Cooking
Different Cuts of Beef
Quality in a restaurant centers around good taste from fresh food. Some consumers are also conscious of ingredients, and whether or not it is cooked properly, or made-to-order.

Quality in a Restaurant [unaided]

“Food that **tastes good** is make with **simple**, solid ingredients, and prepared **without excess** fats or sugars.”
– Male, 20

“Whether or not food is **fresh or frozen**. The technique(s) used in **preparing** the food. The amount of time it takes to prepare the food. The type of **ingredients** used.”
– Male, 26

“**Well seasoned**. Cooked to preference. **Choice** products. Chosen by well **informed** personnel. **Tasty.**”
– Female, 31

“**Food that tastes good** is make with **simple**, solid ingredients, and prepared **without excess** fats or sugars.”
– Male, 20

“**Quality to me is food that is tasty, natural ingredients, local, and with portions that leave me satisfied.**”
– Male, 32

“**Fresh ingredients** prepared to **order** with good **presentation** and **seasoning.**”
– Female, 25

Q100. How do you define “quality” when it comes to the food that you eat in a restaurant? Think of restaurants that range from fine dining to fast food.
Consumers define quality in beef based on taste, physical attributes like tenderness, juiciness, and freshness, as well as how it was raised.

Q110. How do you define “quality” when it comes to the beef that you eat, such as steaks and burgers?

"Beef should be well marbled and dry aged. I look for a deep red color and a thin crust when searing. Beef should be very moist but not so juicy that it leaves a pool of liquid on the plate. Simple seasoning, salt a bit of pepper."
- Male, 27

"I consider the grade of the beef as well as if it is organic. I prefer ground sirloin burgers and tenderloin or sirloin for steaks. The beef should have a fresh smell to it and look freshly prepared/butchered."
- Female 32

"Nothing treated or done with the cow (chemicals, preservatives, etc.) Juicy and cuts like butter. Not greasy in any way."
- Male, 21
Consumers feel that the greatest impact on quality in the beef lifecycle stems from the product — how cattle are fed, how beef is cooked or prepared, and how cattle are raised.

**Greatest Impact on Quality**

- How the cattle are fed: 27%
- How the beef is cooked or prepared: 26%
- How the cattle are raised: 23%
- How the beef is distributed: 10%
- How the cattle are butchered: 4%
- Where the beef is purchased: 10%

**POINTS TO NOTE:**

Urban consumers are less likely to say that the cooking preparation of beef impacts quality [16%] while those in rural areas consider how beef is raised to have less influence [15%].

Frequent beef eaters think that how beef is distributed has more of an impact on quality [17%] than those who eat beef weekly [4%] and less often [3%].
The most popular images represent how consumers feel steak should look when prepared correctly, as a raw cut of meat and “cooked to perfection.”

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Images</th>
<th>Comments</th>
</tr>
</thead>
</table>
| 28%        | ![Image](image1.png) | - temperature
- cooking
- sizzle
- preparation

“Strips cooked perfectly to medium. All sizzling and made me really want to eat them. Like they were homemade.”
- Female 20 |
| 26%        | ![Image](image2.png) | - bright red
- fresh
- no fat
- good cut

“The uncooked one with the least fat looks like it just came like straight from the butcher.”
- Female, 20 |
| 24%        | ![Image](image3.png) | - well cooked
- not too red
- thickness
- seasoned

“It looks like it has spices and seasoning on it and looks thick and juicy so it’ll taste really well. It also doesn’t look rare so it looks more appealing to me that way.”
- Male, 21 |
| 22%        | ![Image](image4.png) | - pink center
- quick sear
- presentation
- high-end

“The rare meat with red and green and white decorations looks cooked to perfection.”
- Female, 31 |
The second set of popular images include beef that is marbled for taste, prepared with skill in gourmet plating and on the grill, and raised in natural conditions.

<table>
<thead>
<tr>
<th>Image</th>
<th>Characteristics</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Image" /></td>
<td>• presentation • cooked well • complete dish • skill and care</td>
<td>“Looks like they're being intentional about how the product is being cooked and presented. They also look like good cuts of meat.” – Female, 29</td>
</tr>
<tr>
<td><img src="image2.png" alt="Image" /></td>
<td>• marbling • fat ratio • cut and size</td>
<td>“Because you eat with your eyes first. The cut of the meat matters.” – Male, 32</td>
</tr>
<tr>
<td><img src="image3.png" alt="Image" /></td>
<td>• well cooked • grill marks • no pink • thick cuts</td>
<td>“These look nice and plump.” – Female, 32</td>
</tr>
<tr>
<td><img src="image4.png" alt="Image" /></td>
<td>• locally sourced • open grazing • grass-fed • natural</td>
<td>“I chose the country side because to me it symbolizes free range beef which I have experienced to have more flavor than other beef.” – Female, 21</td>
</tr>
</tbody>
</table>

Q120. Which of the following images do you feel best reflect “high quality” beef? Please select up to five images and explain your choice(s) in the space below. 

- Female 29
- Female, 31
- Male, 21
- Male, 26
- Female, 32
- Female, 24
- Female, 25
- Male, 28
- Male, 25
- Female, 32
- Male, 26
- Female, 29
Seared, Wood Fired, and Grilled are the top cooking methods to indicate high quality. Medium Rare and Rare are the most high quality meat temperatures.

**Prep and Cooking for High Quality**

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grilled</td>
<td>34%</td>
</tr>
<tr>
<td>Wood Fired</td>
<td>34%</td>
</tr>
<tr>
<td>Seasoned</td>
<td>34%</td>
</tr>
<tr>
<td>Marinated</td>
<td>33%</td>
</tr>
<tr>
<td>Seared</td>
<td>32%</td>
</tr>
<tr>
<td>Medium rare</td>
<td>31%</td>
</tr>
<tr>
<td>Slow roasted</td>
<td>31%</td>
</tr>
<tr>
<td>Smoked</td>
<td>27%</td>
</tr>
<tr>
<td>Rub seasoning</td>
<td>25%</td>
</tr>
<tr>
<td>Medium well</td>
<td>22%</td>
</tr>
<tr>
<td>Rare</td>
<td>21%</td>
</tr>
<tr>
<td>Braised</td>
<td>21%</td>
</tr>
<tr>
<td>Well done</td>
<td>21%</td>
</tr>
<tr>
<td>None of the above</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Top 5 Most Associated Words**

- Hibachi: 17%
- Chargrilled: 17%
- Medium: 17%
- Barbecued: 17%
- Roasted: 16%
- Charbroiled: 16%
- Sauteed: 16%
- Glazed: 14%
- Simmered: 14%
- Stir-fried: 10%
- Broiled: 10%
- Lacquered: 8%

**POINTS TO NOTE:**

Seasoned [49%], Marinated [47%], Slow Roasted [40%], Rub Seasoning [36%], and Braised [34%] all resonate more among Rural consumers.

More than 1 in 4 parents think Well Done, Roasted, Sautéed, and Simmered indicate high quality, indexing more than 10% higher than non-parents for these preparation types.
The majority of Millennial beef consumers consider Filet Mignon the highest quality cut of meat, followed by Sirloin and other rib and short loin cuts.

### Cuts and Types for High Quality

<table>
<thead>
<tr>
<th>Cut Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filet Mignon</td>
<td>56%</td>
</tr>
<tr>
<td>Sirloin</td>
<td>33%</td>
</tr>
<tr>
<td>Ribeye</td>
<td>28%</td>
</tr>
<tr>
<td>Tenderloin</td>
<td>27%</td>
</tr>
<tr>
<td>Porterhouse</td>
<td>26%</td>
</tr>
<tr>
<td>T-bone</td>
<td>26%</td>
</tr>
<tr>
<td>Strip</td>
<td>13%</td>
</tr>
<tr>
<td>Brisket</td>
<td>12%</td>
</tr>
<tr>
<td>Flat Iron Steak</td>
<td>9%</td>
</tr>
<tr>
<td>Medallions</td>
<td>9%</td>
</tr>
<tr>
<td>Roast</td>
<td>9%</td>
</tr>
<tr>
<td>Tri-tip</td>
<td>8%</td>
</tr>
<tr>
<td>Hanger Steak</td>
<td>7%</td>
</tr>
<tr>
<td>Ground</td>
<td>7%</td>
</tr>
<tr>
<td>Short rib</td>
<td>6%</td>
</tr>
<tr>
<td>Flank</td>
<td>6%</td>
</tr>
<tr>
<td>Chuck</td>
<td>6%</td>
</tr>
<tr>
<td>Skirt</td>
<td>5%</td>
</tr>
<tr>
<td>Patty</td>
<td>5%</td>
</tr>
<tr>
<td>Kebab</td>
<td>4%</td>
</tr>
<tr>
<td>Franks</td>
<td>4%</td>
</tr>
</tbody>
</table>

Average 15%

**POINTS TO NOTE:**

Millennials under age 30 are much more likely to see Filet Mignon as high quality [62%] than those over age 30 [36%]. Similar, Filet Mignon indexes higher among less frequent beef eaters [66%] compared to more than weekly beef eaters [45%].

Consumers over age 30 think more highly of Strip Steak [20%] while those in rural areas think more highly of Brisket [26%], than the average.

Q140. Which of the following types or cuts of beef do you consider to be of the highest quality?

Confidence interval +/- 1.9% to 4.9%
6. Dining Ethnography

Finding a Restaurant
Searching the Menu
Choosing a Dish
Satisfaction
Quality in beef indicates cuts of meat that are taken care of with skilled preparation, while quality in foodservice also indicates a welcoming and happy atmosphere.

**FOOD AND QUALITY SPECIFIC:**
- fresh, big steak, juicy and chargrilled
- prime cuts, butchered well, seasoned, and cooked-to-order (i.e. medium rare)
- tender meat that falls apart or melts
- little to no fat or gristle on the meat
- unique, well-prepared, and chef-selected
- homemade and not processed

**OTHER IMPORTANT FACTORS:**
- great atmosphere to spend with others
- recalls home-cooking and good times
- quality wine and beverage selection
- inviting, comfortable, authentic

“Good quality meat that is taken well care of makes your experience really great.”
– Male, 25
When choosing a restaurant, most Millennial beef consumers want to know what they are walking into, hence the penchant for research, options, and familiar places.

Choosing a Restaurant

**FOOD AND QUALITY SPECIFIC:**
- variety of beef options to choose from
- familiarity, especially with a local spot
- recommendations and ratings found online or from people they know
- explore menu options online beforehand
- view of the kitchen and preparation when inside the restaurant

**OTHER IMPORTANT FACTORS:**
- convenient location and hours (i.e. close to work, 24-hours, near movie theater)
- pleasant ambiance and crowd
- happy hour, serve alcohol or beers on tap
- cost savings (i.e. unlimited sides, having a gift certificate, two-for-one specials)

PHOTO EXERCISE: RESTAURANT
Participants uploaded a wide variety of photos during the restaurant experience to show why they chose the restaurant.

RIGHT: “I went to hotpot on a cold day, it was all you can eat and it was also a fun DIY thing. I knew there were interesting cuts of beef on the menu such as the tongue and stomach.”
- Female, 23

“My boyfriend wanted to eat at this Spanish restaurant and told me how great it was.”
- Female, 25
Participants were influenced when choosing from the menu options by beef cuts, interesting ingredient combinations, preparation style, and information on how their food was raised.

The Big Burger
8.25
2 patties with American cheese, Thousand Island dressing, lettuce, tomato, onion and pickles

The Holy Cow Burger
6.95
Single patty with bacon, cheddar cheese, BBQ sauce, lettuce, tomato and an onion ring on a brioche bun

The Mushroom, Bacon, Swiss
7.25
Single patty with bacon, Swiss, sautéed onions, A1. Steak Sauce on a pretzel bun

The Frenchie Burger
7.35
Single patty with melted Brie cheese, sautéed mushrooms, caramelized onions, lettuce and tomato

Burgers and Sandwiches

Hamburgers are 6 1/4 ounces of freshly ground, locally raised grass fed beef
Grill items are served with fresh fries, lettuce and a pickle.
Chili, sautéed mushrooms or sautéed onions are available at 25¢ each

CARNE ASADA
Thickly sliced burger steak, seasoned & charbroiled, grilled nopales, green onions

BEEF TENDERLOIN
Grilled tenderloin, asparagus, chimichurri, mashed potatoes, mixed salad

SWEET CHIPOTLE CAMARONES
Chipotle raspberry shrimp, almond coconut rice, green beans

TALLARIN DE MARIPOS
Spicy seafood pasta with scallops, calamari, salmon, linguine

AVENIDA BURGER
Beef patty, sautéed beans, guacamole, jalapeños, tomato, French fries

CLASSIC BURGER
Beef patty, bacon, lettuce, tomato, onion

MAHI MAHI AL PASTOR
Pastor sauce, pineapple, cilantro, onion as with rice & black beans 16

TACOS
Cilantro, onion served with rice and beans
Chicken 51, Shredded Beef 35

LEFT: “I was torn between the Faburge (chipotle-garlic bacon, fried egg), the Mushroom Burger Melt (roasted crimini, portobello mushrooms), and the BYO Burger (because I can get BBQ sauce and avocado, my favorite).”

RIGHT: “Another part of the menu that stood out was on the bottom left corner where it said RAM’s Commitment to Locally Sourced, Quality & Sustainability and it listed the different local farms in the area from which it gets ingredients.” – Female, 29

ABOVE: “The filet medallions, USDA Choice sirloin steaks, and the beef tips stood out the most to me. I liked the way these items were described. I wondered what the sides were and how many sides came with the entree.” – Female, 32

LEFT: “The beef options seemed appealing because steaks were described by the cut. For example, one dish contained hangar steak: There were no pictures on the menu, however, which was frustrating.” – Female, 25
PHOTO EXERCISE: BEEF DISH
Participants showcased a variety of beef dishes, often chosen due to freshness, the ability to have it made-to-order, portion sizes, price, cravings, and either familiar flavors, or wanting to try something new. When steak is present it was often as an ingredient rather than center of the plate.

ABOVE: “I chose entrecote beef because the portion was big and it has a lot of flavor without using a lot of spices. I ordered medium rare.” – Female, 26

LEFT: “What they are famous for and I had a craving. This was the most appealing because I saw in the deli counter and it looked very fresh. This beef is great because it has a smoky taste that I love.” – Male, 26

LEFT: “Today's special – beef enchiladas. I had never tried it and often take the opportunity for real food from the deli.” – Male, 26

ABOVE: “I was won over by the BBQ sauce and bacon. Also because I had the dish before, I knew what it tasted like. The other non-beef options weren't selected because they didn't seem as appetizing or as filling.” – Male, 26

BELOW: “I got the French dip with chicken dumpling soup and waffle fries. It looked the best and was on special. I liked how the sandwich looked big! The beef just was the most appealing in the pics and sounded good to me when described.” – Male, 32

LEFT: “I ordered the beef tips. I like the fact that their steaks are hand cut and it appeals to me to know that extra care is taken for preparations.” – Female, 32

ABOVE: “I was won over by the entrecote beef because the portion was big and it has a lot of flavor without using a lot of spices. I ordered medium rare.” – Female, 26

LEFT: “What they are famous for and I had a craving. This was the most appealing because I saw in the deli counter and it looked very fresh. This beef is great because it has a smoky taste that I love.” – Male, 26

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PHOTO EXERCISE: SATISFACTION

Beef consumers crave meat that is hot, fresh and that they can sink their teeth into. Too dry or simple in flavor, not enough bite, different than what they imagine when ordering, and too fatty leaves them doubting the quality.

ABOVE: “The meat was definitely high quality and cooked to perfection! It was so tender and just melted in my mouth with every bite.” – Female, 21

ABOVE: “The quality was not great. The flavor was okay, though it lacked spice. The texture seemed off as if it was mixed with fillers. There weren’t any large pieces and nothing inside the enchilada besides the ground beef and sauce.” – Male, 26

LEFT: “Ok. There was some fat still left on the meat. There was also not as much flavor in the meat as I would have liked.” – Female, 26

LEFT: “It was cooked to order and hot when served, locally sourced, cooked the way I like it, and was juicy despite being well-done. It also looked nice, with chargrill lines on the top. I would have liked it if the patty was a bit bigger/thicker, but it was delicious and exactly what I was looking for.” – Female, 29

RIGHT: “I believe the beef was well seasoned and there was a decent amount provided. The only downside was that it was runny and the juice was getting on other food. But tasted fresh not frozen.” – Female, 26

RIGHT: “I would give it a 6.5/10. It was not tough but not very juicy and rare like I like it. The beef was just like a sliced then frozen then cooked feel to me. The dryness of the beef hurt the sandwich a bit. I would have liked bigger slices and more rare meet.” – Male, 31

ABOVE: “The burger was juicy and not overly fatty. It had a good general flavor by itself before even adding the toppings. The dish met my expectations.” – Male, 29

ABOVE: “The burger was juicy and not overly fatty. It had a good general flavor by itself before even adding the toppings. The dish met my expectations.” – Male, 26

ABOVE: “The beef was cold, and tough I would have liked tortillas to put the ingredients all in, and the beef to be more tender and cooked medium instead of burnt.” – Female, 25

ABOVE: “The beef was cold, and tough I would have liked tortillas to put the ingredients all in, and the beef to be more tender and cooked medium instead of burnt.” – Female, 25

LEFT: “The beef seemed very fresh. I could see the patties being made through the glass kitchen divider. The outside had a good caramelization and it was a little crispy. The patties were tender and had a little bit of beef fat that also added to the good flavor.” – Male, 31
4. Summary Insights
Summary Insights

**Insight | Taste, freshness, product attributes followed by how food is raised are the largest indicators of quality for beef in Foodservice.**

- How beef is raised, fed, and cooked are equally important stages of the lifecycle of the beef they consume.
- Taste, Tender, Fresh, Juicy, are all mentioned most in unaided responses on quality in beef.
- Beef and quality are synonymous with things like uniqueness, juiciness, tenderness, taste, healthy, flavorful, cooked properly, etc., but beef can enhance it's quality profile in foodservice through ideas such as preparation, ingredients, presentation and proper portion sizes.

**Insight | Beef prepared with skill communicates high quality in the cut, color, cook temperature, and presentation.**

- Filet Mignon, Sirloin, Ribeye, or Tenderloin cuts, cooked Medium Rare, and prepared Seared, Wood-Fired, or Grilled are considered the highest quality preparations of beef among Millennials.
- The preferences of beef consumers are still varied as most do not represent the majority, so ensuring skill in preparation and meeting expectations as promised in descriptions or images is important, as Millennials value expertise, honesty, and keeping their word.
Insight | Choosing a restaurant hinges on reputation, descriptions, information about the beef, and external factors.

- Many Millennials frequent the same restaurants, especially when ordering beef as they dine out less often and want quality to be ensured.
- Certain buzzwords like freshness indicators (Hand-Cut, In-House) quality indicators (Grade, USDA inspected) and origin (Farm mentions, Grass-fed) indicators work, even when Millennials know that they are not clear on what each term means.

Insight | The taste of beef is most memorable, along with the care given to cuts of meat and interesting ingredients and pairings.

- Beef consumers, in general, respect meat and want to know that it has been cared for from cattle to consumption.
- Demonstrating care, whether via prolonged preparations with marinades, rubs, slow-roasting, and other techniques, or giving consumers background information on hand-selection, hand-made, and chef-specific instructions, will signal quality when choosing from menu items.
- Interesting ingredient pairings in their menus offer a twist on classics that let them explore while also knowing what the quality they can expect.

Insight | Satisfaction means living up to expectations: cooked to their preference, big, juicy bites (when steak is an ingredient), and freshness they can count on.

- Seeing food being cooked in front of them is a big draw in fast food, fast casual, and local restaurants.
- Portion sizes, including side dishes, are important in order to fill them up and receive a hearty, quality meal.
- Freshness can be tasted, so being transparent with consumers about preparation is an authentic way to indicate quality.
5. Appendix

Respondent Profile
Respondent Profile

Gender
- 55% Female
- 45% Male

Age
- 30-34: 25%
- 25-29: 40%
- 20-24: 35%

Parent
- Yes: 67%
- No: 33%

Children’s Age
- 0-5 months: 8%
- 6-12 months: 16%
- 1-3 years: 36%
- 4-6 years: 29%
- 7-9 years: 19%
- 10-12 years: 14%
- 13+: 5%

Locality
- Urban: 50%
- Suburban: 38%
- Rural: 12%

Race
- Caucasian / White: 72%
- African-American / Black: 15%
- Asian: 8%
- Other: 5%

Ethnicity
- Non-Hispanic: 92%
- Mexican, Mexican American, Chicano: 3%
- Cuban: 3%
- Venezuelan: 3%

D105. Are you...?
D115. Which best describes your race?
D120. Are you of Hispanic, Latino or Spanish origin?
D130. Which best describes where you live?
D140. How many children are living in your household?
D145. How old is your child?
Thank you

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