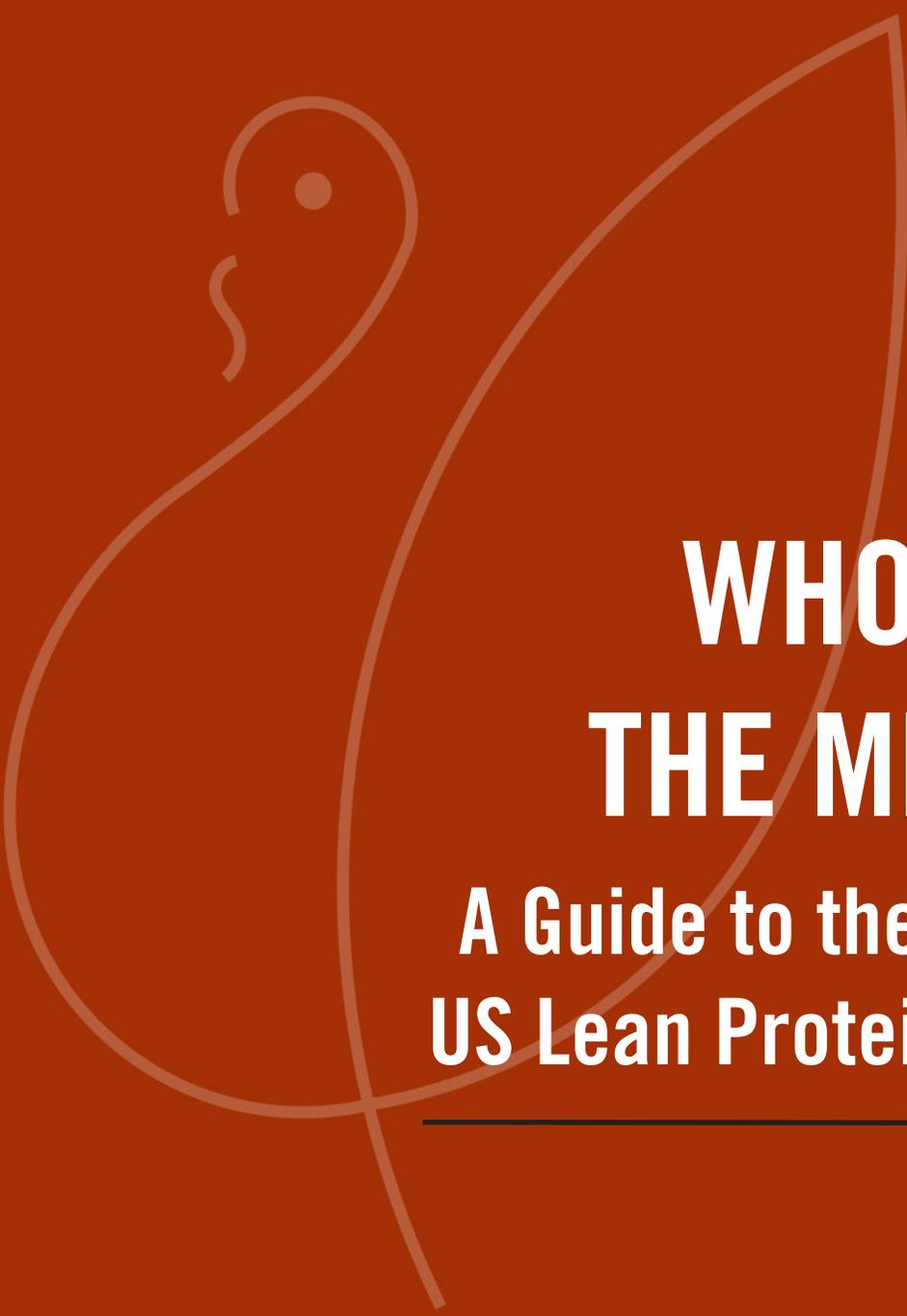


▶ MARCH 2015



WHO EATS THE MEATS?

A Guide to the Modern
US Lean Protein Eaters

WHO EATS THE MEATS?

A Guide to the Modern US Lean Protein Eaters

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TABLE OF CONTENTS

- 1 Project Overview and Methodology
- 2 Essential Questions
- 3 Segments Revealed: Your Modern Lean Protein Eaters
- 4 Modern Proteins
- 5 Five Truths About Turkey as a Lean Protein
- 6 Building a Path for Success
- 7 Meet the Authors

PROJECT OVERVIEW AND METHODOLOGY



1

2

3

4

5

6

7

Whether you're an on-the-go mom, an avid exerciser or just a regular Joe, maintaining a balance of protein in your diet is important for everyone. In today's world, the list of protein sources has grown incredibly long. Consumers can get the necessary amount of protein to fuel their day in a number of ways, but lean meats are key to crafting a healthy lifestyle.

Turkey, which is naturally a low-fat protein, offers a number of key attributes, including iron, zinc and potassium, and it plays an important role in strengthening the body's immune system. However, turkey is also heavily associated with the Thanksgiving holiday and tends to stay stuck in holiday season. Due to perceptions and myths surrounding the protein, consumer consumption of turkey has remained stagnant at around 16 pounds of turkey per year. This stagnation has led to an overarching question for the turkey industry: Despite consumer taste satisfaction, a low price-point and a number of healthy attributes, why do more people not consider turkey when grocery shopping or eating at restaurants?

In an attempt to answer this question and find the key areas of opportunity to increase turkey consumption, the National Turkey Federation (NTF) partnered with FutureCast and OutLoud LLC to better understand the tensions keeping consumers from placing turkey higher in their consideration set of lean protein meal options.

Our results tell the story of consumers who are uninformed about the benefits of turkey and ill equipped with the resources to cook and serve it. The FutureCast team, with collaboration from OutLoud and support from the NTF, oversaw and authored this report. Our research was conducted in three separate parts:

1. Lean Protein Behavioral Segmentation

Most brands have segmented the market to understand their customers. While most turkey brands also have their own segmentations, there has yet to be a major segmentation conducted on the entire category. FutureCast saw this as an opportunity to segment the lean protein consumer as a whole. By identifying the segments of heavy users of lean protein, we were able to sort through consumers based on not just their demographics, psychographics and attitudes, but also their behaviors at restaurants and grocery stores.

PROJECT OVERVIEW AND METHODOLOGY



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This segmentation studied 31,450,000 adults, age 25-54, who recently purchased lean proteins. These Lean Protein Users (LPUs) are defined as having purchased fresh or frozen turkey breast, fresh or frozen chicken breast, pork chops and/or veal in the last seven days. The objective of this segmentation was to identify the segments of LPUs and use the findings to support the strategic direction and increase the acquisition of new users based on each segment's preferences.

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2. Omnibus Survey

Next, FutureCast developed a discussion guide and conducted a nine-question Omnibus survey to ask specific questions related to purchase habits, consideration, preparation, ordering, and consumption habits of lean meats. This second piece of research was implemented in order to dive deeper into the perceptions of turkey and develop a baseline of turkey as a lean protein for future tracking of marketing efforts.

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The online survey recorded 2,000 general population responses; 1,652 of which were in the 25-64 age group and ran from Jan.9-12. The inclusion of the Omnibus survey allowed us to leverage a combination of quantitative and qualitative data to support our strategic decision-making when determining the best positioning and messaging strategies within the turkey category. It also provided the foundation to the questions that we later asked during our focus groups. The demographic breakdowns of survey include: Age, gender, region, race, education, marital status, children at home, income and social usage. Further significant testing was conducted to call out demographic variables of significance.

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3. Focus Groups

For the final piece of research we conducted were the focus groups, which provided rich anecdotes and insights that supported our findings from both the segmentation and omnibus survey. The overarching goal of the focus groups was to connect with lean protein consumers in order to solve questions around positioning, messaging and potential barriers for turkey going forward. Overall, four focus groups were conducted, two in Kansas City, Mo., and two in Baltimore, Md. Each city had a millennial age group (18-34) and a boomer age group (45-64) and featured a diverse range of education level, ethnic mix and men and women.

Participants in the groups were the primary meal planners/preparers in their households, shopped for groceries at least once a month and ate at a casual/fast casual restaurant twice a month. The two-hour focus groups were held on Jan. 20 and 22.

ESSENTIAL QUESTIONS

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The food industry is constantly changing. With new flavors, recipes and consumers influencing the way we approach food, both the retail and restaurant sides of the food industry have seen incredible growth and change in recent years.

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Millennials have been a huge part of this change, forcing food providers to be more transparent about what they're creating without allowing taste to falter as a cost. Protein is one piece of the food pyramid that has remained a constant in the American diet, but the way customers perceive it has changed. To measure how and why, we needed to answer the following questions about the modern protein consumer:

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1. Who are the groups of modern protein eaters, and how do their consumption habits differ from one another?
2. What are the factors these segments consider when purchasing protein? What holds them back from purchasing other proteins? What influences them to purchase proteins?
3. How do younger consumers approach purchasing proteins differently from older generations?
4. Are flavor and health the biggest perceptions discouraging the purchase of leaner proteins? What are the other underlying barriers affecting grocery and restaurant shoppers?
5. What are modern protein eaters using as resources once they purchase their proteins, and what do they need to make that process easier?

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Throughout this report, we answer these questions in order to discover opportunities for turkey to break through the noise and connect with consumers wanting to add more lean protein to their diets.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

- 1
- 2
- ▶ 3
- 4
- 5
- 6
- 7



Modern Millennials
6,510,150



Established Affluents
2,421,650



Simple Minimalists
6,447,250



Stubborn Old-Schoolers
5,440,850



Flavor Seekers
4,308,650



Time-Pressed Super Moms
6,321,450

Meet your modern lean protein eaters. These six, unique segments make up the universe of lean protein eaters in the US. Each is broken down by percentage and total population. We'll now break down each of these segments and look at how they differ and what matters to each as shoppers and consumers.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

The Modern Millennial

“I’m always looking for new ways to spice up my diet as long as it fits into my hectic, healthy lifestyle.”

The characteristics of a Modern Millennial reflect those of the emerging consumer. They are millennial to their core from their healthy, yet adventurous eating habits, to their high dependency on social connectivity. The Modern Millennial is introducing a new wave of modern consumers. When it comes to the brands they love, Modern Millennials are looking for brands to be open and transparent, standing for more than their bottom line and addressing environmental and socio-economical issues in the community.

Segment highlights

- Percentage of Lean Protein Eaters: 20.7 percent
- Income: \$60-75,000
- Hobbies: Shopping, Cooking, Church/Community, Aerobics, Running/Jogging, Biking, Yoga
- Spending: <\$100/month at FF/FC, ~\$100/month at Casual, \$125/week at Grocery

Shopping/Eating Highlights

- The Modern Millennials highly over-index for purchasing cold cuts, meat alternatives and organic meat and poultry.
 - They offer a huge opportunity for turkey as an alternative for breakfast.
- They also over-index for purchasing turkey (whole, parts, AND breast) in the past seven days, making them one of the most likely consumers to purchase turkey.
- They shop at grocery stores often, prioritizing fresh ingredients.
- They are interested in trying new dishes at restaurants they’ve never visited.
- This group is more likely to purchase food at a fast casual restaurant than a fast food restaurant.
- And they are more likely to spend fewer occasions but more money at a high-quality casual restaurant than the average lean protein eater.

Top Media Consumption habits



SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Meet Sonya.

Sonya, 26, recently moved to Portland with her new husband and accepted a position as an account manager for a small start-up firm in the city. She already loves her job, spending some late nights in the office but doesn't let it dictate her social life, as she plenty to do outside of work. Sonya is definitely a trendsetter among her friends, keeping up with the latest fashions.



When she's not at work or spending time with her husband, Sonya spends a lot of time on the go. A self-proclaimed health nut, she's very conscious of what she eats and manages a well-maintained diet and exercise routine. Sonya is hitting all the milestones, as she's now starting to look into buying a home and getting more involved in her community. She doesn't have kids and isn't ready to plan for them. She's also the leader and organizer of her friends, connecting with people in person as much as she does on her social networks. She is financially stable and is optimistic of her financial future but is still skeptical of the economy. Regardless, she monitors her spending closely and is getting ready to make big life purchases.

When it comes to shopping and eating, Sonya stops by fast food and fast casual restaurants no more than the average lean protein eater, usually around 8-12 times a month. She usually does this to grab a quick bite or the occasional lunch or dinner with her husband at a fast casual stop. Share rarely eats fast food. Casual restaurants are infrequent for her, as she doesn't have time, but she usually spends a bit more than the average consumer and splurges on trying new foods at nicer restaurants like steak and seafood houses.

Sonya loves going to the grocery store and creating her own meals, getting recipes from friends and online. She shops several times a week and picks things up based on what recipe she has in mind, often going up to 10 times a month. She often trades up, meaning she is willing to spend more, for fresh meat and produce.

Sonya buys quite a bit of organic foods and is a big lean protein eater. She tries to buy poultry instead of beef, because she knows it's better for you. Since fresh is so important, she's more likely to buy only what she'll use in the short-term.

Key Takeaway from The Modern Millennial

The Modern Millennial is looking to integrate lean proteins into her diet that allow her to creatively customize and add variety to her diet, while still remaining a healthy source of fuel for her busy lifestyle.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

The Established Affluents

“My life is challenging and different every day.
Food is a big part of keeping my life fresh.”

While The Established Affluents hold many of the same millennial tendencies as The Modern Millennials, including tech savviness and healthy lifestyles, they are at very different points in their lives and also have differing outlooks than the Modern Millennial. The Established Affluents are extremely hard workers and their careers are ultimately priority No. 1. This gives them a large sum of expendable income and allows them to live life to the fullest, constantly trying new things.

Segment highlights

- Percentage of Lean Protein Eaters: 7.7 percent
- Income: At least \$100,000
- Hobbies: Shopping, Cars, Backpacking, Biking, Billiards, Camping, Skiing
- Spending: <\$50/month at FF/FC, >\$100/month at Casual, \$125/week+ at Grocery

Shopping/Eating highlights

- Established Affluents eat lean proteins at similar rates to Modern Millennials, but overall, eat the most proteins among all lean protein eaters.
- They also over-index for purchasing turkey (whole, AND breast) in the past seven days, making them a moderate turkey consumer.
- This group shop at grocery stores more than any segment, prioritizing fresh ingredients.
- They are more likely to shop at grocery stores on a recipe-need basis.
- They will stop at fast food or fast casual alone, most often for lunch.
- They are likely to change their lean protein for variety purpose.

Top Media Consumption habits



SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Meet Amber.

Amber is 34 and lives in Atlanta, working at one of the top law firms in the region. She's smart and has worked her way to the top of her field and is extremely driven by her job. She divorced her husband after things did not work out, but they remain friends. She is not bitter over the divorce; rather, she enjoys spending the extra time at work as well as with her close group of friends. While many of her friends are starting families, children aren't in her plan.



Amber is active in organizations through her job and assumes leadership and mentorships as often as she can. Her friends and family see her as a tremendous role model and often approach her to seek advice on problems.

Amber is also incredibly healthy. She not only tries to eat healthier meals, but snacks healthy, too. Since she's well off financially, Amber loves to travel and live a very active lifestyle. She also enjoys exploring the outdoors, whether it's hiking, biking or sports.

When it comes to eating out, Amber rarely chooses fast food or fast casual restaurants, but when she does, it's generally sandwich shops for lunch. Affluents like Amber don't spend much money at casual restaurants, eating only there only three to six times a month and usually alone or with co-workers and friends. Amber loves taking advantage of her grocery store, shopping up to 10 times a month and trading up for healthy and fresh ingredients. While she tries to plan ahead, she has to make many impromptu stops throughout the week to get something she wants for a specific recipe.

Amber tries to buy organic foods when possible and likes a variety of proteins. Depending on what the recipe calls for, she buys a lot of chicken breasts, pork chops, seafood and some turkey products. Convenience and variety are key, as she loves trying new things, but she doesn't have time to devote to cooking.

Key Takeaway from The Established Affluents

Established Affluents seek variety in their lives, and diet is a key place for this trend. They buy a variety of lean proteins and enjoy cooking at home, rarely eating out. Finding unique, new ways to prepare proteins without taking too much time is key to keeping Established Affluents back for more.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Simple Minimalists

“Let’s just get the shopping out of the way -- maybe try some of these easy frozen dinners?”

Unlike the previous segments, The Simple Minimalists are all about quick, not about healthy. Another key difference is the addition of kids. With more people living in the household, there are fewer visits to the grocery store and more visits to fast food restaurants. Fresh isn’t as important, as this segment is OK with buying more food at a time and freezing it to make it easier to prepare later.

Segment highlights

- Percentage of Lean Protein Eaters: 20.5 percent
- Income: <\$49,000
- Hobbies: Organizational members, Camping, Fishing, Football, Boxing
- Spending: ~\$75/month at FF/FC, <\$100/month at Casual, \$100-150/week at Grocery

Shopping/Eating highlights:

- Over-indexes for eating large amounts of cold cuts, up to five pounds a week.
- Over-indexes for using chicken and poultry as a breakfast alternative, more than any other segment.
- More likely to purchase frozen proteins than other segments based on convenience.
- Very frequent fast-food restaurant visitor.
- Infrequent casual restaurant visitor.
- Infrequent grocery shopper with higher spending per visit.

Top Media Consumption habits



SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Meet Jeff.

Jeff, 33, lives in Bloomington, Ill., working as a manager at a local retail store. Jeff is a classic example of a blue-collar American living in a Midwest town. While he's not married, he and his longtime girlfriend have three children, and he works hard to support them. His job doesn't pay especially well, so he's taking part-time classes at a local community college to earn a degree and work his way up.



Jeff is not an active Internet or social media user and traditionally doesn't trust giving away his personal information to companies, regardless of what they're selling. He lives a very conservative lifestyle and doesn't spend a lot of money on big purchases. When he does spend money on the family, it's usually on medium-sized purchases, such as appliances and electronics, or on small getaways like weekend fishing trips.

It's safe to say that Jeff isn't big on exercising and would rather stay in and watch TV than workout. This lack of concern for health is also reflected through Jeff's diet, as he doesn't necessarily care about how nutritional food is or how it's prepared, just as long as it's ready when he's hungry.

When he eats out, Jeff is an avid fast food eater. It's quick, cheap and he is able to go with friends and family easily. This also influences his decision to not eat at casual restaurants very often, usually only going on special occasions with his family.

Finally, when he and his family grocery shop, they take as few trips as possible but spends more than the average consumer

It's no surprise that Jeff doesn't care about organic or fresh food but buys frozen and refrigerated meals thanks to the lack of prep time. His family also stocks up on canned-food items. Jeff gets a significant portion of his protein through cold cuts, especially chicken and bologna. Convenience dinners, such as beef roasts and whole chickens or whole turkeys, are also common at Jeff's house, as they require little prep work.

Key Takeaway from The Simple Minimalist

The Simple Minimalist is simply looking for convenience and speed above all else. Their frequent stops to fast food restaurants encompasses what they want in a meal and their distaste for shopping explains why they bulk up in prepared and frozen meals. By offering quick and easy options, Simple Minimalists are easy to please.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Stubborn Old-Schoolers

“Unless I’m going to be grilling, I could care less what’s for dinner.
Now quiet down and let me watch the end of the game.”

The Stubborn Old-Schoolers are the oldest segment yet, and with age comes specific nuances. Even less concerned with eating healthy and exercising than the previous segment, Stubborn Old-Schoolers bring a Boomer mentality to lean proteins, often getting ideas from TV specials rather than Pinterest or their social networks. This segment is also much more interested in eating hamburgers than lean proteins, and consumption of fast food continues to increase as well.

Segment highlights

- Percentage of Lean Protein Eaters: 17.3 percent
- Income: \$50-90,000
- Hobbies: Watching TV, Auto Racing, Baseball, Fishing, Hunting, Motorcycling
- Spending: Between \$50-500/month at FF/FC, ~\$50/month at Casual, \$50-70/week at Grocery

Shopping/Eating highlights

- More likely than any other segment to purchase beef hamburger meat.
- More likely than any other segment to purchase lamb.
- Buys more fresh meat than other segments.
- Over-indexes for canned meats and canned foods.

Top Media Consumption habits



SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Meet Ray.

Ray is a 66-year-old foreman who lives in an Indianapolis suburb. Even though he's worked in the construction business for over 40 years, Ray refuses to retire and does his best to provide for his family. While his wife passed away a few years ago, his five children and his grandchildren are incredibly important to him, and he visits them as much as possible. A recent empty nester, Ray's youngest just went off to college, and the rest of his children are either married or in the workforce.



When Ray isn't working or spending time with his children, he is watching TV. He's very much a conservative and certainly a traditionalist, listening to the radio and reading the newspaper everyday. He prefers watching sports rather than participating and does not exercise very often, no matter what his kids or doctor tells him., He loves the outdoors, however., Hunting and fishing are a pastime he loves sharing with his grandkids. Ray often comes across as a very stubborn and stern person, but those that know him closely know he means well.

Just like his exercise habits would suggest, Ray prefers to eat what he wants, often eating at fast food joints up to 15 times a month. He usually eats alone when he gets fast food but likes to treat his co-workers and family. He doesn't often eat at casual restaurants, but when he does, you can almost bet it's going to be an all-you-can-eat buffet with all the options. Ray doesn't spend much at the grocery store, only going a few times a month to get all the necessities.

While he's not especially big on cooking, Ray loves to cook meat and makes it a priority to buy the best and freshest meats whenever he does. He loves hamburger and cooks it more than anything else. He also loves fresh cold cuts for sandwiches, but more often than not, prioritizes convenience and even buys canned meat for most occasions.

Key Takeaway from The Stubborn Old-Schoolers

The Stubborn Old-Schooler is just that, stubborn. They have a traditional way of doing things, including cooking, and they plan to stick to that. However, they're open to learning ways to make their traditions and habits easier and faster.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Flavor Seekers

“I expect my meals to be as adventurous and creative as I am, as long as I don’t have to be an executive chef to pull it off.”

The Flavor Seekers are a little bit older than the millennial segments, but a little bit healthier than the previous two segments. Being realistic with what they can pull off in a recipe, yet seeking to spice up their meal, is the sweet spot for winning over this group. They’re also more likely to dine at casual restaurants than other segments, which helps them find new dishes to add to their current diets.

Segment highlights

- Percentage of Lean Protein Eaters: 13.7 percent
- Income: \$50-75,000
- Hobbies: Shopping, Cooking, Art, Investments, Backpacking, Hiking, Water Sports
- Spending: ~50/month at FF/FC, \$50-500/month at Casual, \$60-100/week at Grocery

Shopping/Eating highlights

- More likely to purchase fresh turkey products (breast, parts and whole)
- More likely to purchase pork roast more than any segment.
- More likely to purchase lamb more than any segment.
- Over-indexing in purchasing game hens.
- Demonstrating favoritism toward organic foods, fresh produce, fresh meat and poultry.
- Purchasing significant, up-scale branded cold cuts.
- More likely to only visit grocery store one to three times per month
- Likely to visit casual dining restaurants more than fast food or fast casual restaurants.
- Over-indexing for using meat alternatives including poultry.

Top Media Consumption habits



SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Meet Adam.

Adam, 36, is a freelance graphic designer working in a New York City suburb. While Adam was married, he separated from his wife and has enjoyed joining the dating scene. He does, however, help provide for his child who lives with his former wife and visits him every other weekend.



A bit of a perfectionist, Adam has extremely high standards in everything he owns. When he goes shopping, he has a select number of brands he purchases from and does not trade down for brands he thinks are lower quality. Likewise, Adam holds himself to similar standards and maintains a healthy diet and tries to exercise as often as possible. He is also extremely adventurous both in the foods he tries and quite literally in that he loves traveling to places he's yet to see.

Adam is extremely confident in his financial success and feels he is primed for the future. He does spend quite a bit of his extra income on big-ticket household essentials, staying up-to-date on technologies and appliances. Because of his adventurous and artistic outlook, Adam's friends see him as an extremely confident and creative person, often joining him for activities like hiking, skiing, and water sports.

When it comes to fast food, Adam usually eats with a friend or family member and does not eat out very often. Coffee and bagel shops are especially hot spots. However, Adam eats out at casual restaurants quite often, treating breakfasts and dinners as social events with friends, co-workers and family. He doesn't stop at the grocery store very often, and when he does, he spends only a fraction compared to what he spends at casual restaurants.

On the few occasions per months when Adam buys groceries, he looks to organic food and fresh produce and meats as core items on his list. He also loves sandwiches, so he makes sure that cold cuts are plentiful at his house. Poultry is one of his favorite proteins, and he buys as much turkey as any other protein.

Key Takeaway from The Flavor Seekers

The Flavor Seekers are healthy, financially stable adults who are extremely realistic about how they spend their money, exercise and shop. They're looking for flavorful, adventurous foods for a good price and aren't afraid to try them either at a retail location or restaurant.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Time-Pressed Super Moms

“I don’t have time to do a lot of things,
leaving me settling for the fastest solution.”

The Time-Pressed Super Mom name may sound familiar. There are quite a few of them you probably know already. Trying to balance work and family is no easy task, and it often shows through the decisions this group makes about eating and shopping. Fast takes priority over fresh; this segment eats the least amount of lean proteins and instead buys more beef products. These super moms know all about healthy eating, but they don’t think they have the time it takes to create healthy meals.

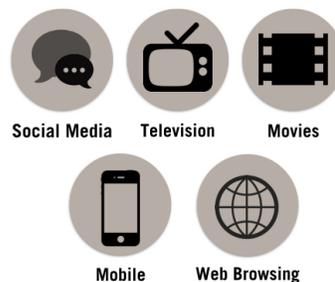
Segment highlights

- Percentage of Lean Protein Eaters: 20.1 percent
- Income: ~\$50,000
- Hobbies: Needlework/Quilting, Musical Instruments, Photography, DIY, Photography
- Spending: \$100-500/month at FF/FC, >\$100/month at Casual, \$100-125/week at Grocery

Shopping/Eating highlights

- Least likely segment to purchase any specific protein.
- Do not eat organic foods.
- Do not frequently purchase cold cuts.
- More likely than other segments to purchase array of beef products (roast, steak, ground).
- Heavy fast food visitors, low casual restaurant visitors.

Top Media Consumption habits



SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

1

2

3

4

5

6

7

Meet Anne.

Anne is a 38-years-old, part-time real estate agent and a full-time mom to three kids. She and her family live in Lincoln, Neb., and she is in charge of keeping her house running on all cylinders all the time. She lives a very hectic lifestyle and is the definition of “on-the-go”.



Anne rarely has time for herself with so much to do but embraces her artistic side when she gets the chance, participating in needle working, photography and DIY projects she finds from friends on social media. She’s fairly simple when it comes to buying and providing for her family, not concerned with what’s fashionable or trendy, rather, relying on friends when buying products. She also is not very health conscious, rarely making it to the gym and not participating in many extra-curricular activities.

This trend clearly translates into her shopping habits as well, stopping at fast food restaurants extremely often. She takes her kids with her while she’s on the go and sacrifices the poor quality for a quick solve to a fast meal. This leaves less time for casual restaurants, so she only visits them for special occasions. Anne also hits the grocery store several times a month, making a mixture of quick stops and longer trips for stocking up for the whole family.

Anne doesn’t have a favorite protein, but beef products are popular for her cart. Sales drive her purchases generally, as well as the ability to make meals for her whole family with one protein.

Key Takeaway from The Time-Pressed Super Moms

This segment has a difficult time balancing work life with home life and often resorts to finding cheap, easy solutions to fulfill their family’s short-term needs, regardless of how healthy the options may be.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

TOP FAST FOOD/FAST CASUAL RESTAURANTS

- 1
- 2
- 3
- 4
- 5
- 6
- 7



The following chart shows the top fast food and fast casual restaurants that each segment eats at most often. Modern Millennials and Established Affluents tend to spend more at fast casual restaurants than fast food. Old-Schoolers, Minimalists and Super Moms are looking for quick options, so fast food stops are more frequent for these groups.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

- 1
- 2
- 3
- 4
- 5
- 6
- 7

TOP CASUAL/SIT-DOWN RESTAURANTS



The following chart shows the top casual/sit-down restaurants that each segment eats at most often. Affluents and Flavor Seekers specifically look to casual dining experiences more for social outings whereas Old-Schoolers and Minimalists try to get the most out of their money, eating at buffets and home-cooked inspired restaurants more than other segments.

SEGMENTS REVEALED: YOUR MODERN LEAN PROTEIN EATERS

- 1
- 2
- 3
- 4
- 5
- 6
- 7

TOP GROCERY STORES



The following chart shows the top grocery stores that each segment shops at most often. While many are regionally based, younger segments have a tendency to spend more at grocery stores, shopping at specialty stores that have fresher ingredients. Minimalists, Old-Schoolers and Super Moms look to superstores to get the best value for their larger, more infrequent shopping trips.

MODERN PROTEINS

1

2

3

4

5

6

7

Throughout this report, we have provided in-depth analysis of how the different groups of lean protein eaters approach shopping for proteins at the grocery store, fast food chains and casual dining environments. We now understand some of the nuances and personality differences of each segment and how they approach shopping and cooking. At this point, we must transition our thinking and start viewing protein as a modern core food. What does this mean? Essentially, we need to find what actions the lean protein industry must take to position itself as a cornerstone in the restaurant and retail spaces.

We'll now look at some of the findings on consumer perceptions related to lean proteins, and more specifically, turkey. These are the five truths you need to know about turkey and lean protein eaters.

5 TRUTHS ABOUT TURKEY AS A LEAN PROTEIN

1

2

3

4

5

6

7

1. Grocery is Key to Stomachs; Restaurants are Key to Growth

Grocery stores and restaurants play a very important, yet different role in the future of lean proteins. While grocery stores are where the vast majority of Americans spend their money for food purchases, there has been a long-trending upswing for restaurants focused around fast service with fresh ingredients. Not surprisingly, millennial consumers are the drivers behind this force, but it is certainly trickling to other generations as well. In fact, according to the data gathered by the American Enterprise Institute, Americans typically spend more on groceries than dining out, but the restaurant industry is finally about to buck that trend. In January of 2015, for the first time ever, sales at restaurants (\$50.475 billion) surpassed those of grocery stores (\$50.466 billion).

Does this mean the inevitable downfall of grocery stores, as we know it? Of course not! It means that each industry will play a major role in the success of lean proteins. So what do we specifically know about these two industries related to proteins and turkey?

Overall, and not surprisingly, turkey is top of mind at the grocery store but not in the restaurant space. While 68 percent of consumers from the lean protein Omnibus study said they were very likely or somewhat likely to purchase turkey while grocery shopping, only 46 percent said the same about turkey at a casual restaurant. The same discrepancy exists in short-term purchase decisions as well with consumers two times more likely to purchase turkey at a grocery store than at a restaurant.

In general, consumers are not aware of turkey in the restaurant space outside of sandwiches, but one group of consumers is more open to others to trying it there. Fifty-two percent of millennials (age 18-34) said they were likely to purchase turkey given the option at a casual restaurant, which is 5 percent higher than gen x and over 10 percent higher than boomers. This is great for turkey and other proteins at the restaurants, but how do these two industries truly work together?

Modern consumers are blurring the lines between restaurants and grocery stores. For example, people purchasing takeout dining and in-store meals in grocery stores is up 30 percent since 2008, and restaurants are creating more CPG versions of recipes for consumers to create at home. Both options play a huge role in helping consumers adopt new foods into their diets.

5 TRUTHS ABOUT TURKEY AS A LEAN PROTEIN

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When asked what would increase the likelihood of ordering turkey at a casual restaurant, respondents' top answers were if the option was a good value or a healthy option. However, the next insight is incredibly important for restaurants. Twenty-six percent would try a turkey item if it were something they couldn't make at home, 22 percent would try it if it were a specialty at that restaurant, and 19 percent said if it were an alternative to other protein dishes.

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Interestingly, the trend of eating turkey at restaurants increased with education level. Significantly more consumers with college degrees reported eating turkey.

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When it came to grocery shopping, focus group respondents said that they were not aware of the different cuts of turkey available at the grocery store and were surprised to learn about the various options. The respondents also said that recipes were one way to increase the visibility of the variety of cuts.

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What we learned: Restaurants are key to increasing the overall market share of turkey in the food industry and to getting consumers to try new dishes. However, in order to truly adopt turkey into an everyday dish, consumers need to understand how to make turkey at home.

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2. Education – Tackling the Foreign Bird

While many people like to try new things, others are scared of change. That's a problem for the turkey industry. Most consumers are comfortable with having turkey only at Thanksgiving or in a sandwich. We all know that inspiring change is much easier said than done, but teaching consumers about turkey is one way to help them add it to their diets.

When asked what would make them more likely to buy and prepare turkey, the No. 1 answer was value based, meaning, a sale or a coupon. This is not a surprising takeaway as with most goods, low-priced alternatives are popular. However, 22 percent of Omnibus respondents said they would be more likely to purchase turkey if it were easier to prepare, while 16 percent said they would if there were more recipes and 12 percent would purchase more turkey if they had tips for preparation.

Once again, millennials are one of the driving age groups seeking these resources, with 44 percent of 18-34 year-old respondents seeking recipes and prep tips at the grocery level. However, it's not just young, single consumers seeking help. Fifty-six percent of respondents with children in the household said the availability of recipes was essential to creating meals for their families. Highlighting "versatility" and creating "foolproof" quick recipes were especially important to those shopping and cooking meals for families.

5 TRUTHS ABOUT TURKEY AS A LEAN PROTEIN

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Taking these figures into considerations, marketers and suppliers alike have a huge opportunity to solve a need for consumer's need for recipes. This outcry for help in prep and cooking begs the question, "Why are people so unfamiliar with turkey?"

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What we learned: The biggest problem turkey faces is the box it's been placed in with the holiday season and the fear that restaurants have in serving "Thanksgiving dinner" for lunch. Focus group respondents said that this absence of a variety of turkey dishes in the casual dining space is a huge reason why they are unfamiliar with turkey. Respondents also agreed that while they don't have a problem with turkey, it is certainly unexpected in that it is not top of mind, both as a main course and as a substitute. Unfortunately for turkey, this unexpectedness has led to assumptions, myths and stereotypes that put turkey in a tough position.

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3. Battling Perceptions through Taste Truths

First impressions are often lasting, and unfortunately for turkey, its negative reputation in the lean protein category often reaches consumers before new recipes and menu items do. When Omnibus respondents were asked why they don't eat turkey more often, the range of responses confirmed this negative perception. Nearly a quarter of respondents don't eat turkey more often because it's something they "only eat at the holidays." Twenty-one percent said they never think about turkey, 19 percent think it takes too long to prepare and 17 percent believe it's too expensive.

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These perception hurdles largely center on awareness, or lack thereof, and also were found through qualitative research as well. Focus group respondents also associated turkey with Thanksgiving and cold cuts, rarely noticing it in either restaurants or unique cuts in retail spaces.

Specifically looking at terms and phrases related to turkey, a number of front-runners separated themselves from the rest. Two of the highest turkey-related words were "healthy meal" with 54 percent of consumers calling turkey healthy. Another 48 percent described turkey as a "lean protein", which bodes great for the fact that turkey tends to own the healthy lean protein name. However, "tasty" was the second highest associated word, with 50 percent of consumers associating turkey with a tasty dish. Focus group participants agreed, saying that turkey was unexpected, but once they thought about the protein, it created excitement around concepting and refreshing recipes they currently use.

5 TRUTHS ABOUT TURKEY AS A LEAN PROTEIN

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What we learned: Turkey's biggest opportunity within the lean protein space is how it sizes up with taste. Putting these ideas into action once turkey is top of mind becomes extremely interesting. When Omnibus respondents were asked about agreeing and disagreeing phrases related to turkey, over a third of them agreed that turkey was: versatile, a great alternative, a modern protein, and provided new varieties to current meals. The key to increasing turkey consumption is tying turkey's other unique attributes to its current health halo.

4. Leveraging the Health Halo for all Ages

As mentioned, the top associated words with turkey are related to its healthy benefits. While turkey providers have leveraged this to enter new spaces, such as breakfast substitutes for bacon and sausage and as burger replacements, it's important to note the differences in which the term "healthy" resonates with different protein consumers. Specifically, the biggest difference was found looking at millennials and older generations.

Modern Millennials and Established Affluents actively pursue a healthy lifestyle, which includes balancing meals with colorful plates, exercising and participating in a number of activities throughout the week.

On the other hand, members of the boomer and gen x look at health as a much more reactive process, rather than proactive. They will adapt only when necessary, which usually results in an elimination of a typically unhealthy item, recipe or entrée and replacing it with something else.

What we learned: Turkey has the ability to adapt to both dietary needs, acting as a lifestyle protein for those seeking overall improved health and as a substitute for fattier meals, such as hamburgers, tacos or bacon. This differentiation of healthy is important to make, because not all protein eaters are looking for a lifestyle change, and even more consumers can be convinced to make one simple substitution in a recipe they make weekly.

5 TRUTHS ABOUT TURKEY AS A LEAN PROTEIN

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5. Convenience – Simplifying Means Fast AND Easy

Turkey is once again limited in the convenience space thanks to perceptions of long prep and cooking time associated with cooking a whole bird for Thanksgiving. Just as healthy takes on different meanings, we also learned that convenient also takes on multiple meanings.

Millennials defined convenience as “Something I can make quickly at the end of the day for me and my family.” Older demographics define a convenient meal as “Something that is easy to make” and letting appliances like slow cookers and smokers do the work for them.

The convenience factor at the grocery can really be broken into two pieces, right-sized packaging and appropriate portion sizes. Portion sizes are especially important for consumers looking to plan ahead with their meals. Packaging is especially important for turkey in that it provides different options for cuts, helping dispel perceptions that you can only buy it as a whole bird or in ground forms.

What we learned: Modern consumers of all generations want their meals to be convenient in both of these ways and then some. Expectations for recipes include fresh, fast, healthy, affordable, easy to cook and easy to clean. While it’s obviously impossible to deliver all of these to their fullest capacity, a big hurdle for lean proteins is finding ways to shorten prep and cook times.

BUILDING A PATH FOR SUCCESS

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After looking at the segments of lean protein eaters of today and the trends driving the protein industry, let's discuss the seven ways brands can truly integrate themselves into the consumer journey, create lasting relationships with those looking for protein in restaurants and grocery stores and drive demand.

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1. *Identify Your Customers and Talk to Them*

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We've identified the six core segments of lean protein eaters. Utilize their differences and nuances to cater different benefits of proteins and help make their lives easier. Because the groups approach food, shopping and dining out differently than one another they must learn how the benefits of lean proteins fit into their lifestyles in a customized way.

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2. *Build on Grocery Success*

Grocery stores are currently where lean protein eaters have the most visibility to turkey. Leverage this and work to introduce new cuts, promoting not just value propositions, but also recipes and meal ideas to inspire consumers to create something different from their normal meals. Offering more convenient cuts and packaging options to simplify prep will help consumers create a more customized meal plan.

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3. *Leverage Millennials for Restaurant Growth*

Millennials are fueling a shift toward the restaurant industry. While they still shop at grocery stores, they see value in spending money at fast casual restaurants in order to maintain their on-the-go lives. Look at areas where turkey can be integrated into current day parts and dining styles with twists on flavor to inspire customers to try something new.

4. *Create Unique and Meaningful Content*

Marketers should create a content hub around lean protein that answers consumer questions about cuts and how to prepare turkey. The content must teach consumers how to make it an integral part of their family's diet, or they will continue eating turkey once a year on Thanksgiving or only on sandwiches for lunch.

BUILDING A PATH FOR SUCCESS

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5. *Bridge the Gap Between Healthy and Taste*

While lean protein has separated itself from other foods for being healthier, consumers also believe most proteins are quite tasty. Use messaging to convey that turkey is not only healthy, but it's also delicious.

6. *Co-Create Fresh Options*

Embracing the imagery of fresh is especially appealing to consumers looking to turkey and other lean proteins as a way to add variety to their diets. Using gorgeous imagery, language that evokes fresh and packaging that pops, consumers will be more likely to think of turkey and lean protein as a whole in a more positive light.

7. *Make Friends not Enemies*

All consumers have a purpose and intention when purchasing specific proteins, whether at a restaurant or grocery store. From a hamburger to chicken wings, there is a place for all proteins at the dinner table, and consumers are not especially accepting when their protein of choice is bashed. Instead of positioning one protein against another, create new pairing options.

Once you have embraced these truths and fully invested in engaging the unique segments of lean protein eaters, the more likely they will be to try it in new ways. Providing lean protein eaters with the resources they need to create a healthy, convenient diet will drive demand exponentially and refresh the category for future consumers to come.

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THANK YOU

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To learn more about lean protein trends or to contact members of the National Turkey Federation, please visit EatTurkey.com for more information.