



BeefQ Survey Industry Survey

Beef eating quality, current and potential
future carcass valuation systems.

Author:

Dr Phillipa Nicholas-Davies, Institute of Biological, Environmental and Rural Sciences, Aberystwyth
University, Email: pkn@aber.ac.uk

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Executive Summary

An online survey was conducted by the BeefQ project to gauge industry opinion on beef eating quality (EQ), current and potential future carcass valuation systems. The survey, hosted on KoBo Toolbox, was conducted in Welsh and English between 24th January and 12th April 2021. A total of 165 responses were collected, 25 in Welsh and the remainder in English. The majority of respondents were based in Wales and England and 34% of respondents identified as farmers. Overall, respondents felt consumers were confident in the eating quality of Welsh beef, however, a quarter of respondents, including a quarter of farmer respondents, felt that consumers were not confident in the eating quality of Welsh beef. This suggests a proportion of those involved in the beef supply chain believe there is room to improve the beef eating experience for consumers. The majority of those directly involved in the production and processing of beef (farmers and meat processors) were generally of the opinion that the beef industry needs to evolve from the current EUROP beef valuation system and that there is an industry wide need to introduce a system of assessment and reward for beef eating quality. Views on how such a system should be implemented were more varied, with an extension to the current EUROP grading system being only slightly favoured over a replacement to the EUROP system. There was a preference for an eating quality assessment and reward system to be implemented at a UK national level, either by the levy bodies or an independent organisation. As to who would administer and fund the administration of an eating quality assessment and reward system, the levy bodies the most popular choice, or alternatively, administered by an independent organisation and funded by the levy bodies. The main concerns with respect to barriers to implementation of an eating quality assessment and reward system related to fear of change across the industry and supply chain issues such as lack of cooperation, fairness of cost/benefit within the supply chain and general lack of leadership to take change forward in the UK beef industry. Benefits highlighted included increased sales, improved value within the supply chain and reduced wastage through producing animals that meet consumers requirements.

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1 Introduction

An online survey was conducted by the BeefQ project to gauge industry opinion on beef eating quality (EQ), current and potential future carcass valuation systems. The survey, hosted on Survey Monkey, was conducted in Welsh and English between 24th January and 12th April 2021. The survey was publicised via BeefQ and partner organisation social media channels, the BeefQ website and communications channels of key industry stakeholders represented in the BeefQ project (including YFC Cymru, AIMS, the Institute of Meat, NFU Cymru and the Farmers Union of Wales). A total of 165 responses were collected, 25 in Welsh and the remainder in English. Of the respondents, 34% were female, 64% were male and 2% preferred not to say. Most respondents (40%) were aged between 35 and 55 years of age, 36% were over the age of 55 and 24% were aged between 18 and 35 years of age.

2 Results

2.1 Location of respondents

BeefQ is a Welsh Government funded project, but the majority of Welsh produced beef enters supply chains that operate across the border in England, hence it was important to gather opinion from across Wales and England. Most respondents were from Wales (66%) and England (27%) (Figure 1), and “Other” included respondents from France and the United States.

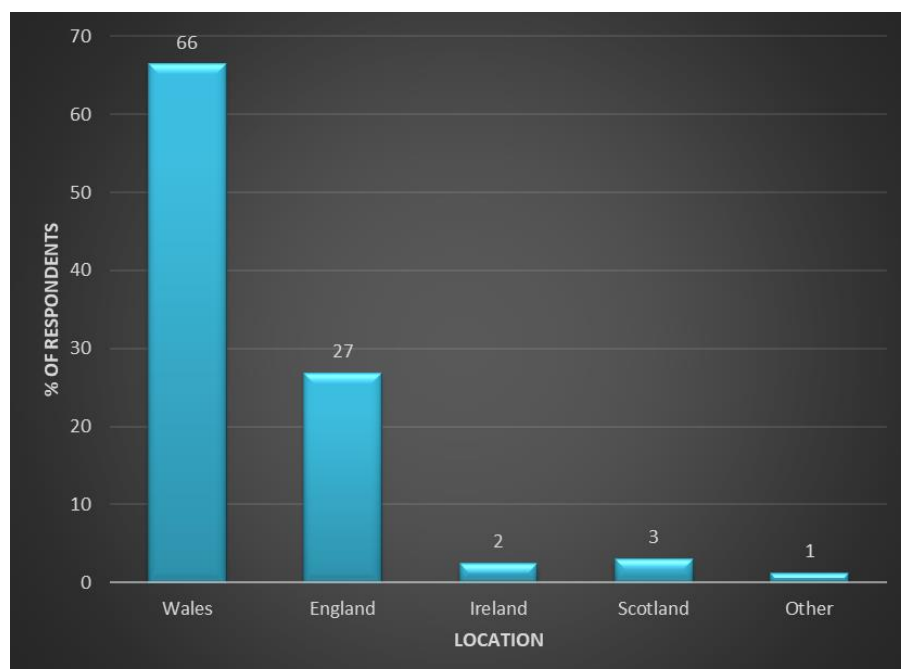


Figure 1. Percentage¹ (%) of respondents by location

¹ Data presented in Figures are rounded to whole numbers.

2.2 Occupation of respondents

Farming was the predominate occupation (34% of respondents, Figure 2) With meat processing, knowledge transfer, farmer organisation and education being relatively evenly represented. Food service and retail occupation categories together contributed 12% of respondents. "Other" included civil servants, writers, PR, trade associations, retired from meat industry and the Carcase Classification Scrutiny Committee members.

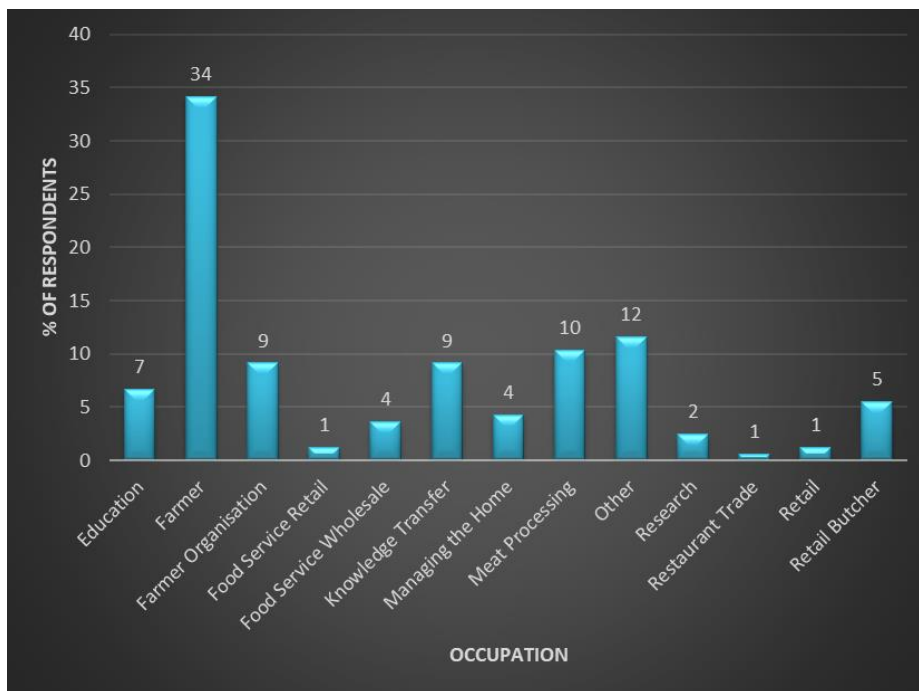


Figure 2. Percentage (%) of respondents by occupation

2.3 Breakdown of farmer respondents by farm type

Farmer respondents were asked to specify the enterprises on their farm (beef, sheep, dairy and other (specify)). Multiple answers could be selected. 50% of farmers identified as being beef and sheep farmers with a further 30% identifying as beef only farmers (Figure 3). A total of 96% of the farmer respondents had beef cattle on their farm. The “other” category included arable, pigs, butchery, tourism, forestry, horticulture and poultry.

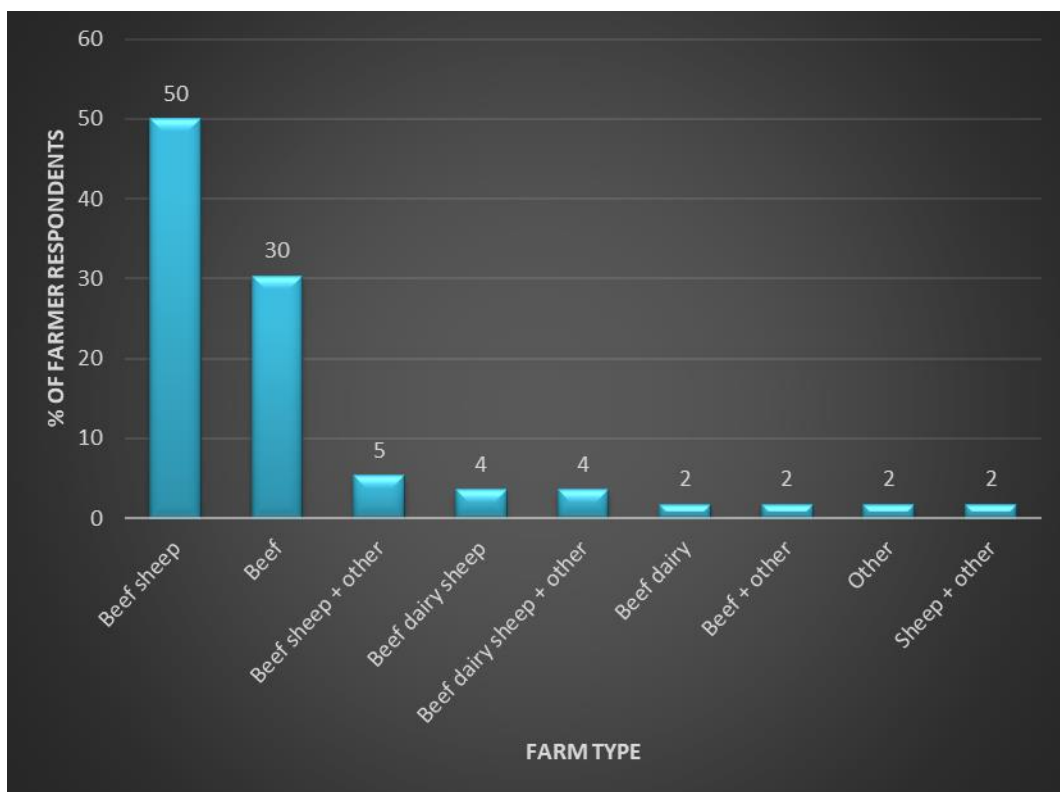


Figure 3. Percentage of farmer respondents by farm enterprise type.

2.4 Consumer perceptions of beef as a food product

Before engaging participants in questions related specifically to beef eating quality, the aim of the following questions was to gauge their views on the strengths and weaknesses of beef as a food product and to determine where eating quality sat in the mindset of consumers when evaluating beef as such.

2.4.1 Positive quality attributes of beef as a food product

Participants were asked “As a consumer what do you believe to be the good points about beef as a food type and source of dietary protein?”. Using a thematic analysis approach, responses were grouped into 6 main themes. The dominant theme (with twice as many mentions as any other theme) was “High Nutritional Quality” which included reference to high quality protein, high vitamin, mineral and trace element content, low fat and low carbohydrate content and part of a balanced diet. The second most prominent theme related to the “Eating Quality Experience” and included reference to good taste, texture, appearance, tenderness, and the consistency of beef as a product. “Accessibility” was a further theme that included the versatility of beef as an ingredient, convenience, and wide availability. “Production quality” attributes were also mentioned, with reference to such things as being sustainably produced, high welfare systems, low food miles, contributing to the local and rural economy and the associated farming systems being good for the environment. The final two themes related to “Price” and “Traceability” however both were only mentioned infrequently.

2.4.2 Negative quality attributes of beef as a food product

Similarly to the previous question participants were also asked “As a consumer what do you believe to be the bad points about beef as a food type and source of dietary protein?”. Using the same thematic analysis approach, 7 broad themes were derived from the responses. The dominant theme (twice as many mentions as any other) related to “Eating Quality Experience” and included topics such as dry, fatty, tough, tasteless, poor texture, not enough marbling and inconsistent eating experience. The next most common theme (less than half the mentions of eating quality) related to “Health Risk”. This theme included reference to high saturated fat content, health/heart problems, carcinogenic, high cholesterol, low digestibility, obesity and the need to consume in moderation. “Production Quality” including reference to intensive and unsustainable farming practices, use of antibiotics, high carbon footprint, poor environmental reputation and welfare concerns, and “Price” (high) were mentioned with equal frequency. The lesser mentioned themes identified related to “Consumer Education” and lack thereof, “Poor Processing Quality” (not hung properly, poor butchery technique) and “Provenance”.

2.5 Drivers for beef purchase

Participants were asked to rank the following drivers in order of importance to consumers when purchasing beef: value for money, provenance, nutrition, sustainability, eating quality, environment, cattle breed and welfare. The proportion of respondents selecting each driver as first choice (i.e. most important driver) is presented in Figure 4. Given the survey is about eating quality it is unsurprising that this was most frequently identified as the most important driver, with provenance and animal welfare being of lesser but equal importance.

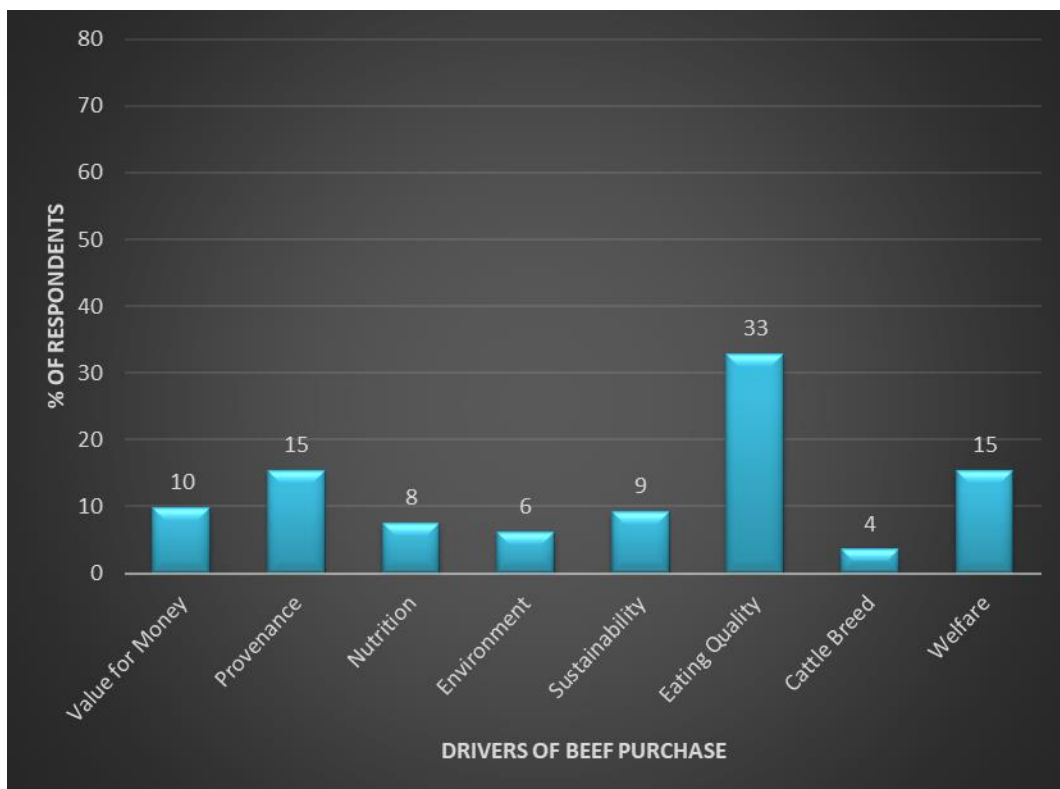


Figure 4. Proportion of respondents ranking each driver as most important in beef purchasing decisions by consumers.

2.6 Confidence in the eating quality of Welsh Beef?

Participants were asked if they thought consumers were confident in the eating quality of Welsh beef. Whilst 76% of respondents thought that consumers were confident in the eating quality of Welsh beef, 24% did not. When views were broken down by occupation (Figure 5), the overall results reflected the dominance of farmers in the survey, though several other occupation categories had a similar breakdown. Those in education tended to think consumers were less confident in Welsh beef eating quality (55%), whereas those in knowledge transfer, managing the home, food service retail (all 100%) and meat processing (82%), were much more confident.

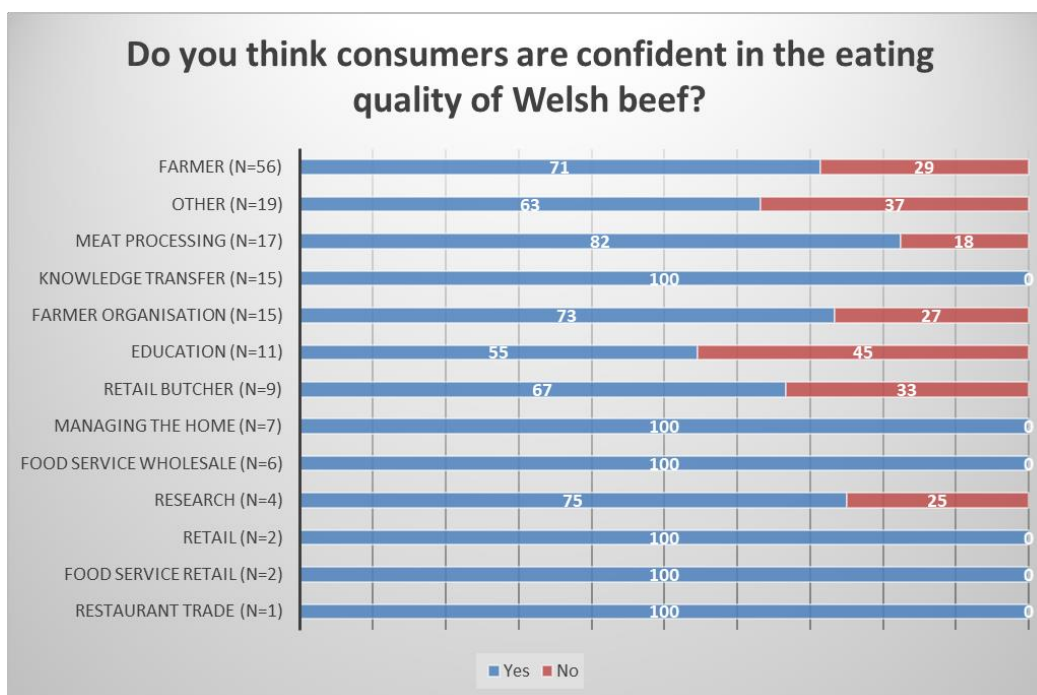


Figure 5. Respondent opinion on whether consumers are confident in the eating quality of Welsh beef, by occupation.

2.7 Need to evolve from current EUROP grading system?

Participants were asked if they felt the beef industry needs to evolve from the current EUROP grading system, to which 74% of respondents answered yes and 26% no. Despite farmers being in the main in agreement that consumers have confidence in the eating quality of Welsh beef, there was a strong indication (Figure 6) that they felt the beef industry needed to evolve from the current EUROP grading system – this is explored further in Section 2.9). Education participants were strongly in agreement of the need for evolution from EUROP which corresponds with their opinion that consumers are not confident in the eating quality of Welsh beef (Figure 5). Those managing the home and in food service wholesale were less inclined to think that the EUROP grading system needed to evolve. This could be explained by their view that consumers are confident in the eating quality of Welsh beef currently (Figure 5) or could demonstrate a lack of knowledge or interest in current and potential grading systems.

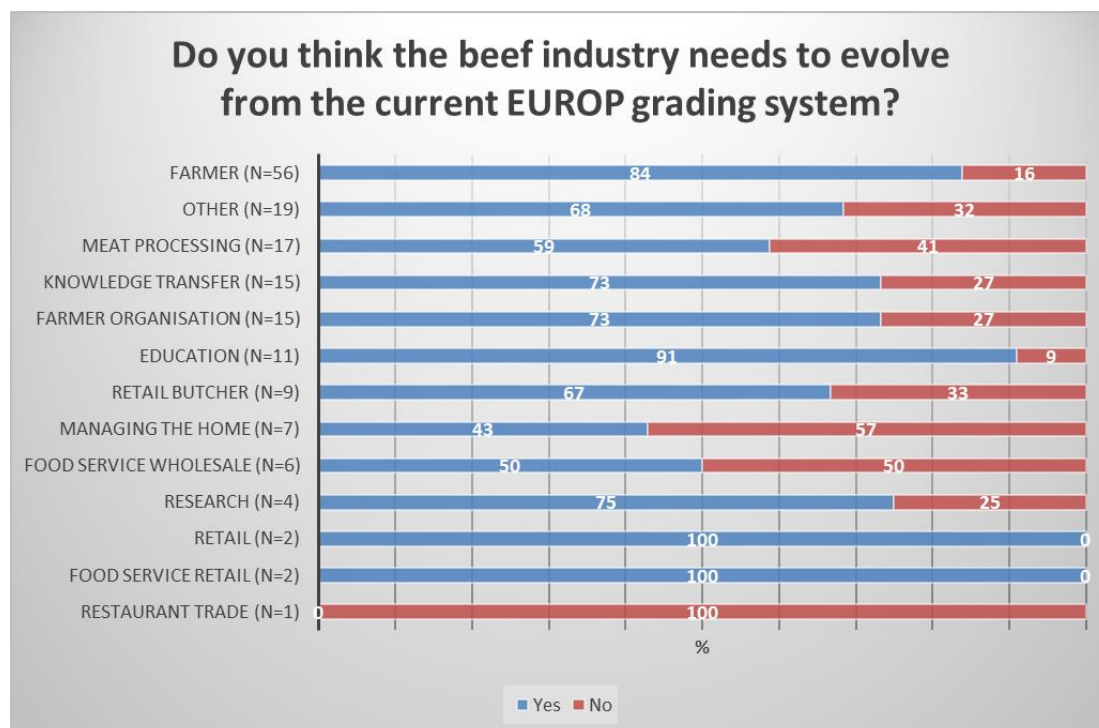


Figure 6. Respondent opinion on whether the beef industry needs to evolve from the current EUROP grading system, by occupation.

2.8 Need to measure and reward eating quality?

Participants were asked if they thought the beef industry needs to measure eating quality and reward accordingly, to which 69% responded yes, 5% no and 26% did not answer. When this is broken down by occupation (Figure 7) it is clear that some occupations had a better understanding (i.e. chose to answer) than others (i.e. left the answer blank), and this may go part way to explaining the responses in Section 0). Again, there was strong support for a system that measures and rewards eating quality from farmer, farmer organisation and education respondents.

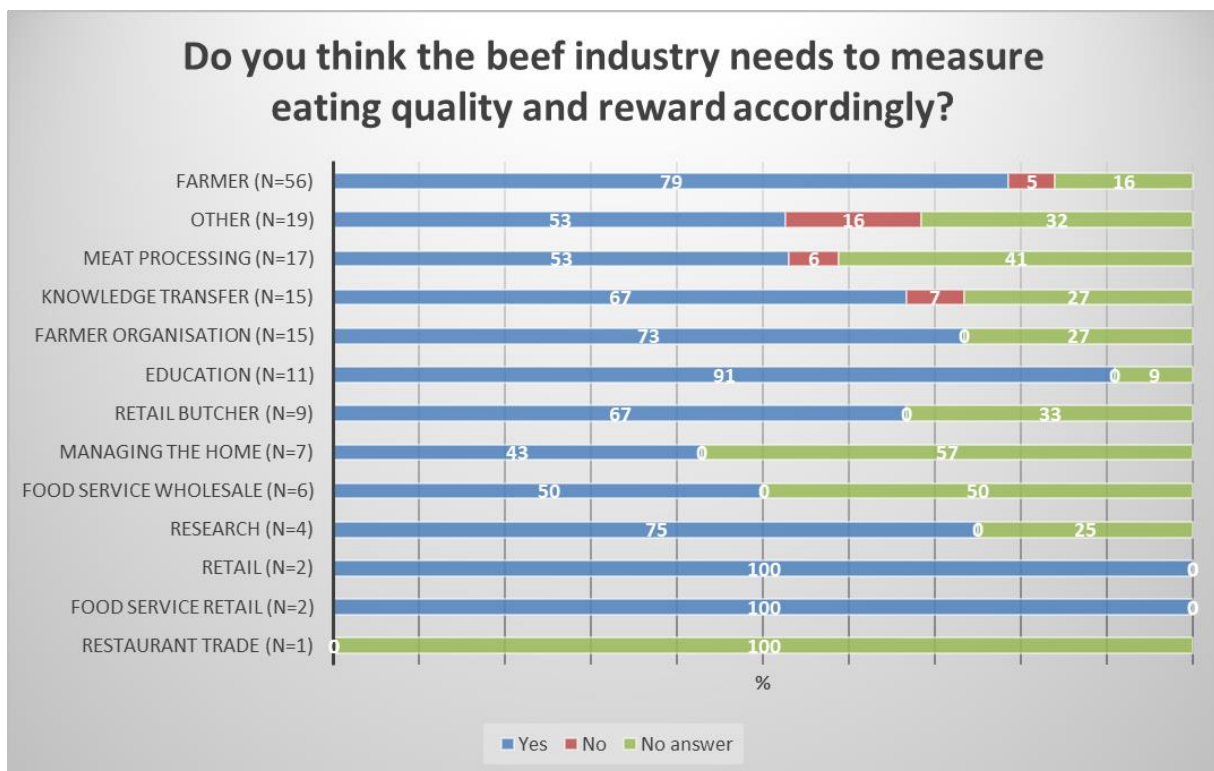


Figure 7. Respondent opinion on whether the beef industry needs to measure eating quality and reward accordingly, by occupation.

2.9 How might a beef eating quality (EQ) assessment and reward system work?

Participants were asked how they would like to see a beef eating quality assessment and reward system work and were given three response options: an extension of the current EUROP system, a replacement for the current EUROP system and other (specify). The participants also had the choice of not responding. Overall results are presented in Figure 8 and it is apparent that views are divided, with only a slightly greater proportion of respondents stating they would like to see an extension of the current EUROP system than those preferring a complete replacement of the current EUROP system. A similar proportion of participants did not respond to the question. Of the “other” responses, several mentioned the Meat Standards Australia (MSA) system, two mentioned valuation based on the system of production (e.g. high welfare, pasture based, low Carbon) and other suggestions included weight of useable meat and taste, a complete reform of the EUROP system to include other characteristics and finally that two systems (EUROP and an eating quality system) need to run along side by side.

When broken down by occupation (Figure 9) no clear patterns were discernible.

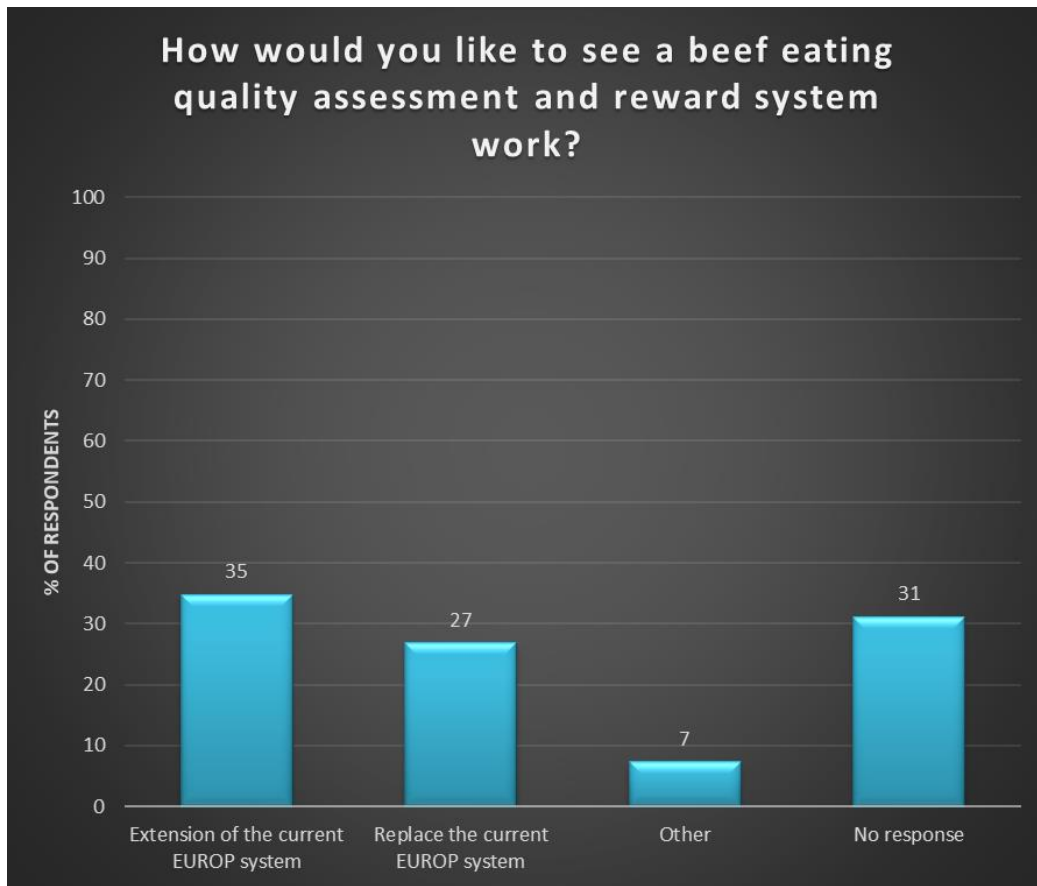


Figure 8. Respondent opinion on how they would like to see a beef EQ assessment and reward system work.

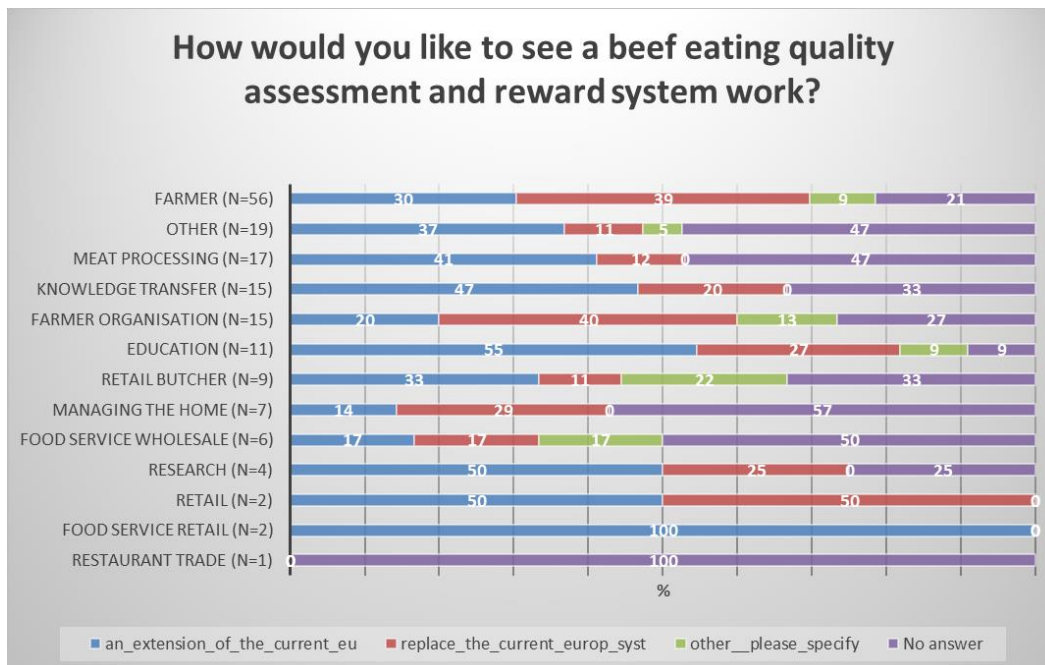


Figure 9. Respondent opinion on how they would like to see a beef EQ assessment and reward system work, by occupation.

2.10 How might a beef EQ assessment and reward system be delivered?

Participants were asked how they would like to see a beef EQ assessment and reward system delivered and given the following response options to choose from: UK national level, Welsh national level, processor led, retailer led or other (specify). Participants also had the option of not responding. Figure 10 indicates the majority of respondents would like to see such a system operating at the national UK level (38%) with a smaller proportion (17%) at the Welsh national level. A large proportion of the participants (31%) chose not to answer the question, again perhaps indicating a lack of depth of understanding as to how beef valuation systems currently operate or might operate in the future. Comments in the “other” category included ensuring farmers have a voice, producer and retailer cooperation with processors, process led by retailer feedback, lack of belief that a reliable beef eating quality prediction system exists currently and finally premiums for certain breeds (native breed base payment) and penalties for continental breeds.

Of the larger occupation categories (Figure 11), a UK national system appears to be preferred, the exception being the knowledge exchange category, where the preference was for a Welsh national level system. It is interesting to note that across all occupation categories there is a relatively high proportion who chose not to respond, even in those high interest groups such as farmers and processors.

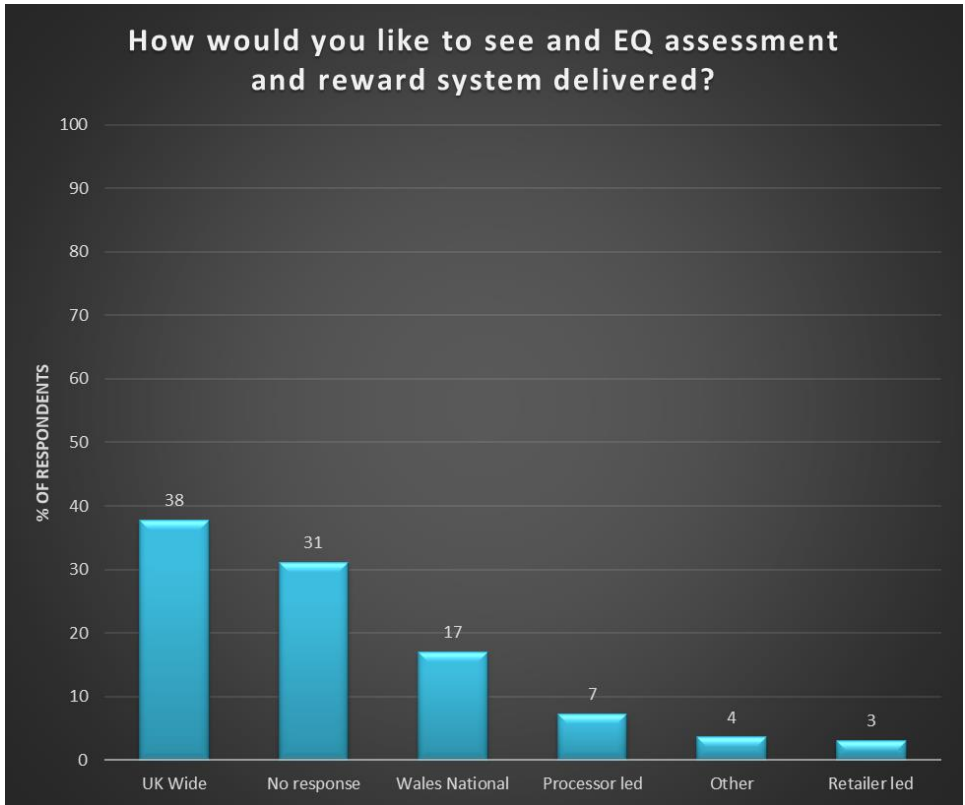


Figure 10. Respondent opinion on how they would like to see a beef EQ assessment and reward system delivered.

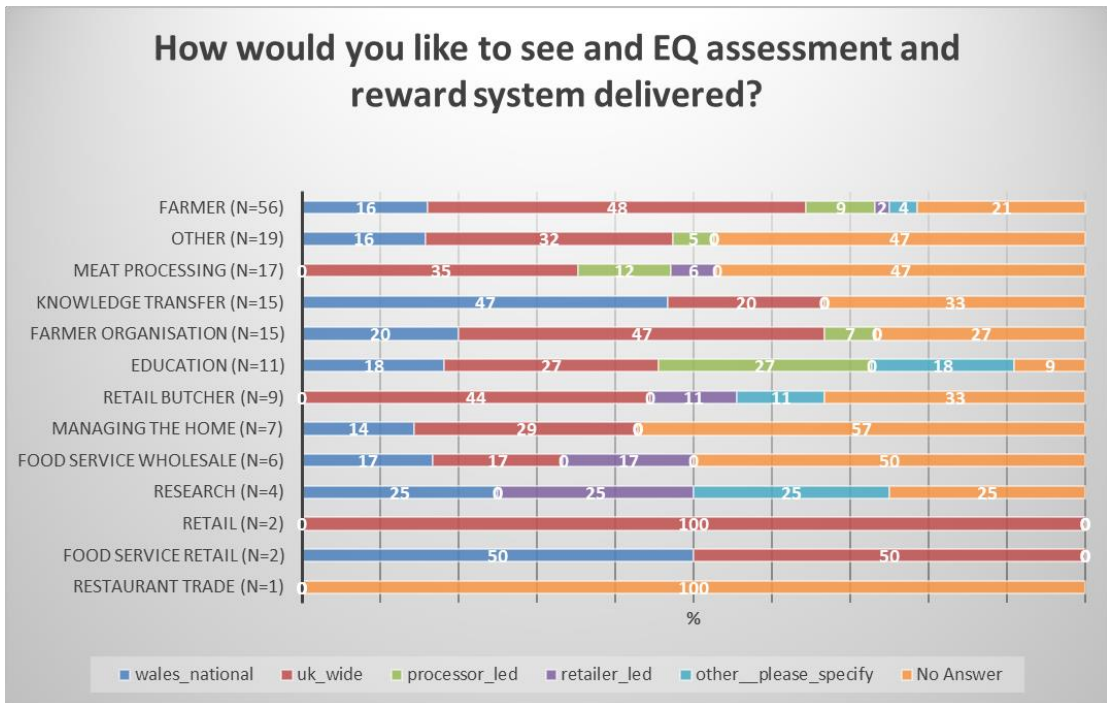


Figure 11. Respondent opinion on how they would like to see a beef EQ assessment and reward system delivered, by occupation.

2.11 Administration of a beef EQ assessment and reward system?

Participants were asked who they thought should be responsible for administering a beef eating quality assessment and reward system and given the following response options to choose from: levy body, independent organisation, UK Government, Welsh Government or individual processors. Participants also had the option of not answering. Of those that responded (Figure 12) the majority were in favour of a levy body or some other independent organisation (24 and 20%, respectively) administering such a system. The choice of levy body, given that they tend to be devolved, conflicts somewhat with responses in section 2.9 where there was a preference for a UK national system, however an independent organisation and UK Government (at 14% of responses) were still prominent choices. Again, a large proportion (almost one third) of participants chose not to respond.

When looking at responses by occupation (Figure 13), there is a mix of responses with no individual occupation category influencing the findings strongly.

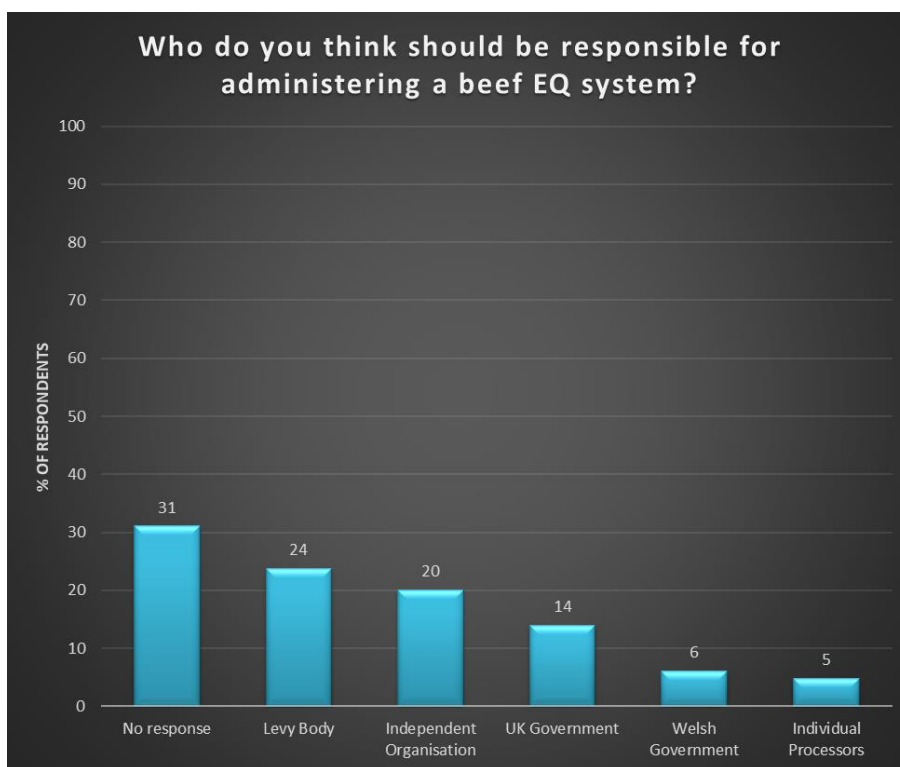


Figure 12. Respondent opinion on how they would like to see a beef EQ assessment and reward system administered.

Who do you think should be responsible for administering a beef EQ system?

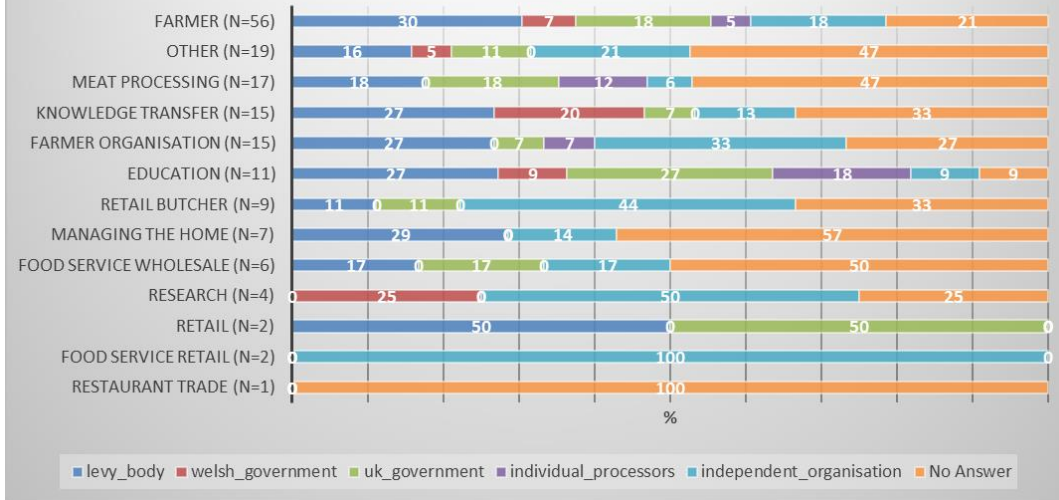


Figure 13. Respondent opinion on how they would like to see a beef EQ assessment and reward system administered, by occupation.

2.12 Funding the administration of a beef EQ assessment and reward system

Following on from Section 2.10, participants were asked who they thought should fund the administration of a beef EQ assessment and reward system. The same answer options were available: levy body, independent organisation, UK Government, Welsh Government or individual processors. Participants also had the option of not answering. Of those that responded, 26% thought the levy bodies should be responsible for funding the administration of an EQ system (Figure 14), followed by the UK Government at 16% of responses. As with the previous question, a high proportion (31%) chose not to answer the question. Again there was a mix of responses across occupations (Figure 15), with no individual occupation category influencing the findings strongly.

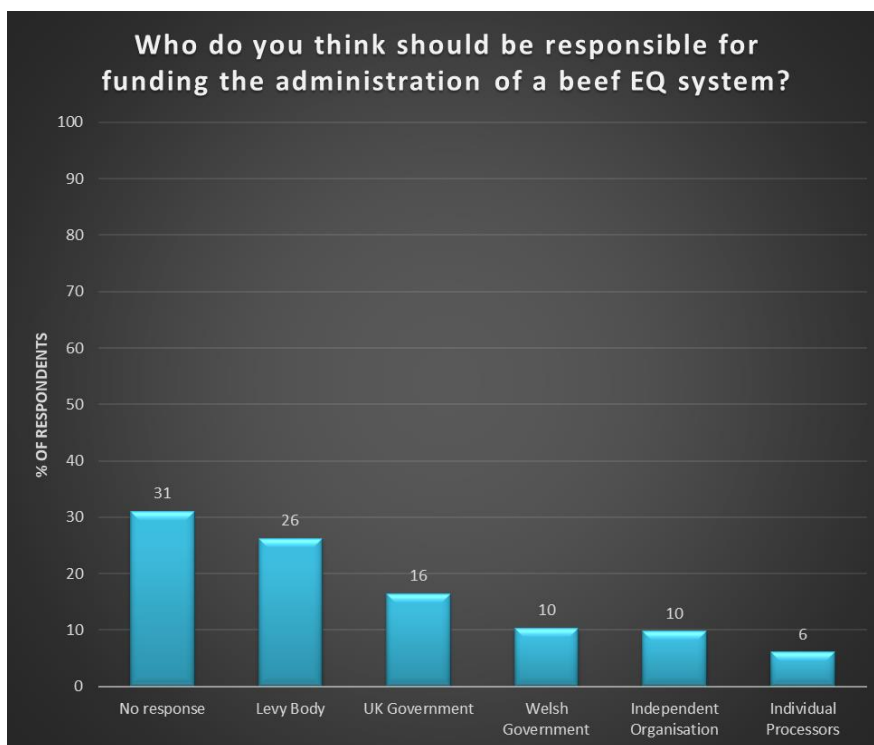


Figure 14. Respondent opinion on how they would like to see a beef EQ assessment and reward system administration funded.

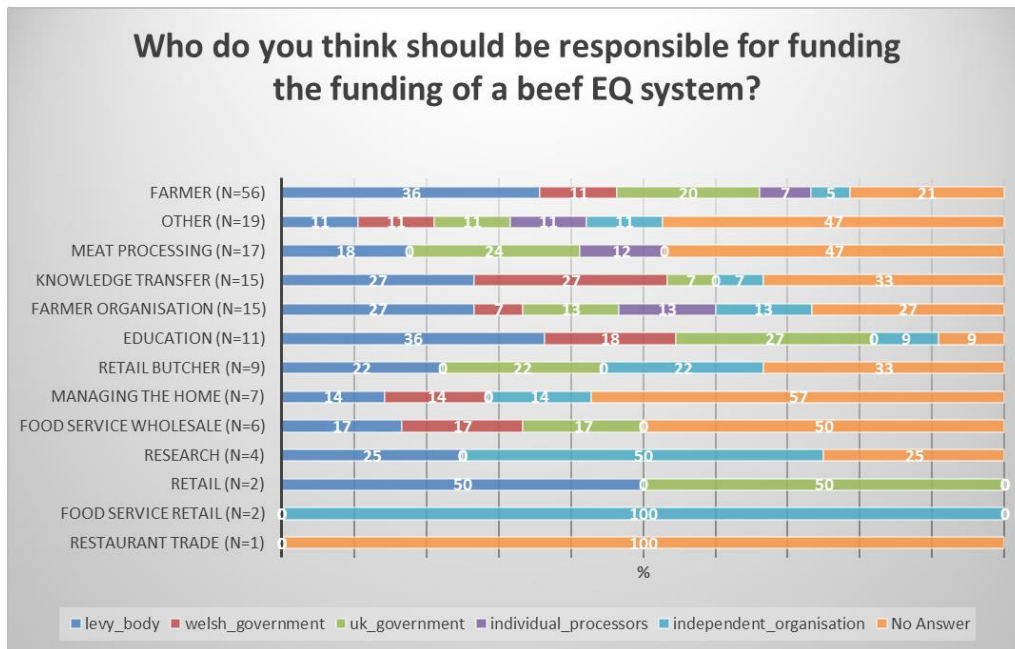


Figure 15. Respondent opinion on how they would like to see a beef EQ assessment and reward system administration funded, by occupation.

2.13 Barriers and benefits of a beef EQ assessment and reward system.

Participants were asked in an open question “What do you see as the main barriers to implementing a beef eating quality system?”. Using a thematic analysis approach, 5 broad themes were identified. Two themes were dominant, “Fear of Change” and “Supply Chain Barriers”. The “Fear of Change” theme referred to being too used to the EUROP system, shifting mindsets from how beef is currently valued, moving away from a culture of continental breeds and how breed societies might respond. “Supply Chain Barriers” referred to the fairness of the system (where costs and benefits sit), the need for the whole supply chain to cooperate, the interest of retailers in eating quality and the lack of leadership in beef eating quality as an industry objective. “Customer Education”, “Who Pays?” and “Grading System Implementation” were the next equally prominent themes. Consumers were thought to have a lack of understanding about eating quality and a lack of cookery skills which play a vital role in the final eating quality experience of consumers. There was general concern around who will pay for the development and implementation of an eating quality based valuation system. “Grading System Implementation” included concerns around balancing eating quality with yield, how eating quality is defined, perceived difficulties with implementing and managing eating quality assessment consistently across the UK and finally how producers can make the link between a live animal and its predicted eating quality given EQ assessment takes place post slaughter.

Likewise, participants were asked in another open question “What do you see as the main benefits of implementing a beef eating quality system?”. Thematic analysis of the responses resulted in 3 dominant themes, “Improved Beef Quality”, “Increased Value of Beef”, “Improved Efficiency” and a minor theme of “Production System Quality”. “Improved Beef Quality” was the most dominant theme and was strongly linked to improved confidence in eating quality. Other aspects of this theme related to improved product quality, and improved evidence base on which to communicate with consumers. The “Increase Value of Beef” theme referred to improved prices for producers, increased sales volumes, potential export markets developing and more even distribution of improved value within the supply chain. Within the “Improved Efficiency” theme, farmers producing animals that meet consumer requirements resulting in less waste and reducing costs of production were both mentioned. With regard to the “System Quality” theme, general improvements in animal welfare and environmental performance were mentioned.

3 Conclusions

The results of this survey will be taken forward in the BeefQ project and used in discussions with industry stakeholders to develop beef eating quality assessment and reward system implementation scenarios. These scenarios can then be used as a basis for discussion in the broader UK beef industry as to the future potential of beef eating quality assessment and reward in the UK.

4 Acknowledgements

The BeefQ project would like to thank all those that participated in the survey and the Welsh Government and European Agricultural Fund for Rural Development for funding the project.