

# Meat Demand Monitor: Fitness-Driven Consumers Purchase Labeled Meat More Frequently

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## Background

Physical exercise and fitness is an important part of American society. The U.S. Bureau of Labor Statistics estimates that 20.1 percent of Americans aged 15 years and over participated in some type of sport, exercise, or recreation on the average day in 2022.<sup>2</sup> Further, 17.4 minutes per day were spent in these activities, on average. Additionally, it is commonly discussed across news outlets, social media platforms, and nutritional journals that those who exercise should be consuming protein to aid in muscle growth and recovery, with some evidence indicating that avid exercisers need *more* protein than the average individual.<sup>3</sup>

Beyond understanding protein consumption differences between those who are invested in their physical fitness and those who are not, it is useful for livestock and food producers to know what types of products fitness-focused individuals prefer. This short report focuses on beef and pork products and provides a first look at how U.S. consumers purchase various package label claims depending on their exercise habits. Label claims related to food production practices (e.g., organic, antibiotic free, etc.) may be interpreted by fitness-focused individuals as being more “healthy” or otherwise better suited to their nutritional needs than products that are unlabeled. These individuals’ meat purchasing behavior has implications for product marketing efforts, nationwide prices, and profit potential in the U.S. meat industry.

## Data

We utilize Meat Demand Monitor (MDM) survey responses from Quarter 1 2024, which total 9,548 after data quality filtering.<sup>4</sup> These responses are weighted to be representative of the U.S. population in terms of age, gender, race, education, income, and region of residence. Important to this report, the MDM captures respondents’ 1) physical exercise habits and 2) what kind of package labels were on their last purchase of various meat products.

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<sup>2</sup> These estimates come from the American Time Use Survey and can be found at [https://www.bls.gov/webapps/legacy/tusa\\_1tab1.htm](https://www.bls.gov/webapps/legacy/tusa_1tab1.htm).

<sup>3</sup> Examples of these discussions are available at <https://www.nytimes.com/2018/02/07/well/move/lift-weights-eat-more-protein-especially-if-youre-over-40.html> and <https://www.tandfonline.com/doi/full/10.1186/s12970-017-0177-8>.

<sup>4</sup> Raw data (13,390 observations) is filtered according to the MDM project methodology statement and all MDM analyses. Observations were also omitted for this report if they were missing important demographic or physical exercise information.

To capture physical exercise habits, respondents are asked “Do you intentionally eat protein to aid in meeting strength-training or other fitness-related goals?” Additional questions in the MDM survey capture respondents’ strength- and aerobic-training activity, though we do not go into detail on the type of exercise in this report.

Regarding package labeling, respondents are shown a list of three beef and three pork products and are asked to indicate what kind of label claims were included on their last purchase of those products. The products included are 1) Steak, 2) Ground Beef/Hamburger, 3) Roast (beef), 4) Bacon, 5) Pork Chops, and 6) Sausage (pork). The label claims are 1) Never Purchased or Cannot Remember Last Purchase, 2) Organic, 3) Free of Added Hormones, 4) Free of Added Antibiotics, 5) Natural, 6) Stall Free (pork products only), 7) Animal Welfare Friendly, and 8) None of the Above (unlabeled). Figures 1 and 2 below depict how label claim questions are presented to MDM participants.

**Figure 1. Beef Package Label Claim Question**

Which of the following is true of the last package of beef products you purchased? Please check all that apply.

	Never Purchased or Cannot Remember Last Purchase	Labeled Organic	Labeled Free of Added Hormones	Labeled Free of Added Antibiotics	Labeled Natural	Labeled As Animal Welfare Friendly	None of the Above
Steak	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ground Beef/Hamburger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Figure 2. Pork Package Label Claim Question**

Which of the following is true of the last package of pork products you purchased? Please check all that apply.

	Never Purchased or Cannot Remember Last Purchase	Labeled Organic	Labeled Free of Added Hormones	Labeled Free of Added Antibiotics	Labeled Natural	Labeled as Stall-Free	Labeled As Animal Welfare Friendly	None of the Above
Sausage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pork Chops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bacon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Who Are the Fitness-Driven Consumers?

Table 1 depicts the share of MDM respondents that indicated intentionally consuming protein to aid in their fitness-related goals. Of the total 9,548 respondents analyzed in this report, 36 percent reported eating protein to help toward their fitness goals. Men more frequently reported being an intentional consumer (42 percent) than females (30 percent). As expected, younger people consumed protein to help meet fitness goals at a higher rate than older people. A majority of respondents aged 18 to 24 years reported intentionally eating protein for their fitness goals (60 percent). This fell to 16 percent for respondents aged 65 years and over. More on fitness-driven protein consumers can be found on a prior MDM special report, where we track their frequency of consumption of various protein sources.<sup>5</sup>

**Table 1. Share of Respondents Consuming Protein for Fitness Goals**

Demographic	Level	Number of Respondents	Share Consuming Protein for Fitness Goals
Total		9,548	0.36
Gender	Female	4,812	0.30
	Male	4,736	0.42
Age	18-24	446	0.60
	25-34	1,101	0.50
	35-44	1,738	0.44
	45-54	1,678	0.32
	55-64	2,351	0.23
	65+	2,234	0.16
Annual Household Income	20k and under	1,438	0.32
	20k-100k	6,407	0.34
	100k and over	1,703	0.40
Education	HS or lower	2,410	0.35
	Some college	4,009	0.31
	BS degree or higher	3,129	0.40
Census Region	Midwest	1,990	0.33
	Northeast	1,720	0.36
	South	3,615	0.35
	West	2,223	0.39
Race	White	6,902	0.32
	Black	1,419	0.49
	Other	1,227	0.42

<sup>5</sup> The report can be found at <https://www.agmanager.info/livestock-meat/meat-demand/monthly-meat-demand-monitor-survey-data/meat-demand-monitor-protein>.

## Frequency of Label Purchase

Table 2 depicts the shares of MDM respondents who last purchased a beef or pork product with a certain label claim. Note that shares for a specific product do not sum to 1 because products can have multiple label claims. Between 30 and 40 percent of respondents reported that their last product purchased did not have a label claim related to food production practices or animal welfare. Of the label claims, “Natural” was most frequently purchased across all products, with around 20 percent of respondents indicating that their last purchase included that claim. MDM respondents less frequently purchased beef and pork products with label claims of “Animal Welfare Friendly” and “Stall Free.” Between 6 and 8 percent of respondents reported their last purchase of steak, ground beef, and beef roast included the animal welfare claim, while between 5 and 6 percent reported their last purchase of bacon, pork chop, and pork sausage had the animal welfare or stall-free claim.

Of further note is that label claims on beef roasts are less prevalent than on steak and ground beef. For instance, 14 percent of MDM respondents reported that their last purchase of roast had a “Free of Added Hormones” claim while only 18 and 20 percent reported that their last purchase of steak and ground beef, respectively, had that same claim. Since label claims are made for the “live animal” stage of production (e.g., the live animal was raised organically), these differences in label claim prevalence for products derived from the same animal reflect differing demand between those products and differing additional benefit to adding a label claim.

**Table 2. Share of MDM Respondents Purchasing a Label Claim**

Claim	Product					
	Steak	Ground Beef	Beef Roast	Bacon	Pork Chop	Pork Sausage
Organic	0.11	0.14	0.10	0.10	0.09	0.08
Free of Added Hormones	0.18	0.20	0.14	0.14	0.16	0.14
Free of Added Antibiotics	0.16	0.18	0.14	0.15	0.14	0.14
Natural	0.20	0.22	0.18	0.21	0.19	0.20
Animal Welfare Friendly	0.07	0.08	0.06	0.06	0.05	0.05
Stall Free	-	-	-	0.05	0.05	0.05
No Label	0.32	0.35	0.32	0.39	0.35	0.38
Did Not Purchase	0.20	0.11	0.25	0.14	0.19	0.18

## Do Fitness-Driven Consumers Differ in Label Purchases?

We can further break down label claim purchases by respondents’ status as an intentional, fitness-driven consumer. Table 3 depicts the shares of MDM respondents who last purchased a beef or pork product with a certain label claim—this time distinguishing between respondents who do and do not consume protein to meet their fitness goals. From the last four rows of Table 3, two things are clear: 1) fitness-driven consumers report “Did Not Purchase” less frequently than other consumers for all meat products and 2) a smaller share of fitness-driven consumers purchase products without a food production practice or animal welfare label (compared to respondents who do not consume protein to aid in fitness goals). These findings suggest that fitness-driven consumers are purchasing meat more than other consumers—

likely to meet perceived protein requirements—and that they desire the product characteristics that label claims convey relatively more than those who are not fitness focused.

**Table 3. Share of MDM Respondents Purchasing a Label Claim—By Intentional Consumer Status**

Claim	Consumes Protein for Fitness Goals	Product					
		Steak	Ground Beef	Beef Roast	Bacon	Pork Chop	Pork Sausage
Organic	Yes	0.18	0.20	0.16	0.17	0.15	0.13
	No	0.08	0.10	0.06	0.07	0.05	0.06
Free of Added Hormones	Yes	0.25	0.27	0.20	0.20	0.22	0.21
	No	0.14	0.16	0.11	0.11	0.12	0.11
Free of Added Antibiotics	Yes	0.22	0.23	0.19	0.21	0.20	0.21
	No	0.12	0.15	0.11	0.11	0.11	0.10
Natural	Yes	0.27	0.27	0.24	0.26	0.26	0.27
	No	0.15	0.19	0.14	0.18	0.16	0.16
Animal Welfare Friendly	Yes	0.11	0.12	0.11	0.09	0.08	0.08
	No	0.05	0.05	0.04	0.04	0.03	0.03
Stall Free	Yes	-	-	-	0.09	0.09	0.09
	No	-	-	-	0.03	0.02	0.02
No Label	Yes	0.17	0.19	0.18	0.23	0.21	0.22
	No	0.40	0.44	0.39	0.47	0.43	0.46
Did Not Purchase	Yes	0.15	0.09	0.20	0.12	0.16	0.15
	No	0.22	0.11	0.28	0.16	0.21	0.20

A larger share of fitness-driven consumers (compared to other consumers) reported their last purchase having some kind of label claim across all beef and pork products. For example, 18 percent of intentional, fitness-driven consumers reported that their last purchase of steak had an “Organic” label, compared to only 8 percent of other consumers. Label claims specifically related to food production practices are more commonly purchased by fitness-driven consumers. Between 13 percent (“Organic” pork sausage) and 27 percent (“Natural” steak, ground beef, and pork sausage) of these consumers reported their last purchase included these label claims.

Interestingly, higher shares of fitness-driven consumers also indicated that their last purchase of beef and pork products had some type of animal welfare label. As this type of label does not convey information related to nutritional content or food safety (which fitness- and health-conscious individuals are likely interested in), we were initially surprised by that result. However, it is important to consider that beef and pork products with one label claim commonly include other label claims as well. This means that fitness-driven consumers may want to purchase a meat product with the “Organic” label (for example), but that product also has a “Animal Welfare Friendly” label. This can result in the fitness-focused consumer group having relatively higher purchases of products with animal welfare-related labels than other consumers.

## Final Thoughts

Physical exercise and fitness goals are key considerations in many Americans diets and food purchasing behavior. This has implications for protein-dense food items especially, as protein is needed to aid in the repair and growth of muscles after an exercise bout. In this short report, we assess if exercisers purchase beef and pork products with label claims more or less frequently than other consumers. These label claims may signal that a product is “healthy,” making it more desirable to the health- and fitness-focused consumer.

In Quarter 1 2024, 36 percent of MDM participants indicated that they intentionally consume protein to aid in meeting their fitness-related goals. This percentage was higher among males and younger individuals. These intentional, fitness-focused consumers reported purchasing beef and pork products with some type of label claim at a higher rate than the average MDM participant. Additionally, they reported not purchasing beef and pork products (regardless of package label) at a relatively lower rate than the average participant. These results suggest that fitness-focused consumers desire beef and pork products disproportionately—likely to help meet any perceived protein need—and that they may associate production practice-related label claims (e.g., organic) with the healthfulness of the food product. Food retailing strategies and the effectiveness of public information campaigns related to healthy eating can be improved if consumers’ physical exercise habits are seriously considered. Further, production practices and marketing on behalf of U.S. livestock and meat producers likely needs to take into account the health- and fitness-conscious population, as this group of people is sizable and has demonstrated notable differences in their protein purchasing behavior.

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