

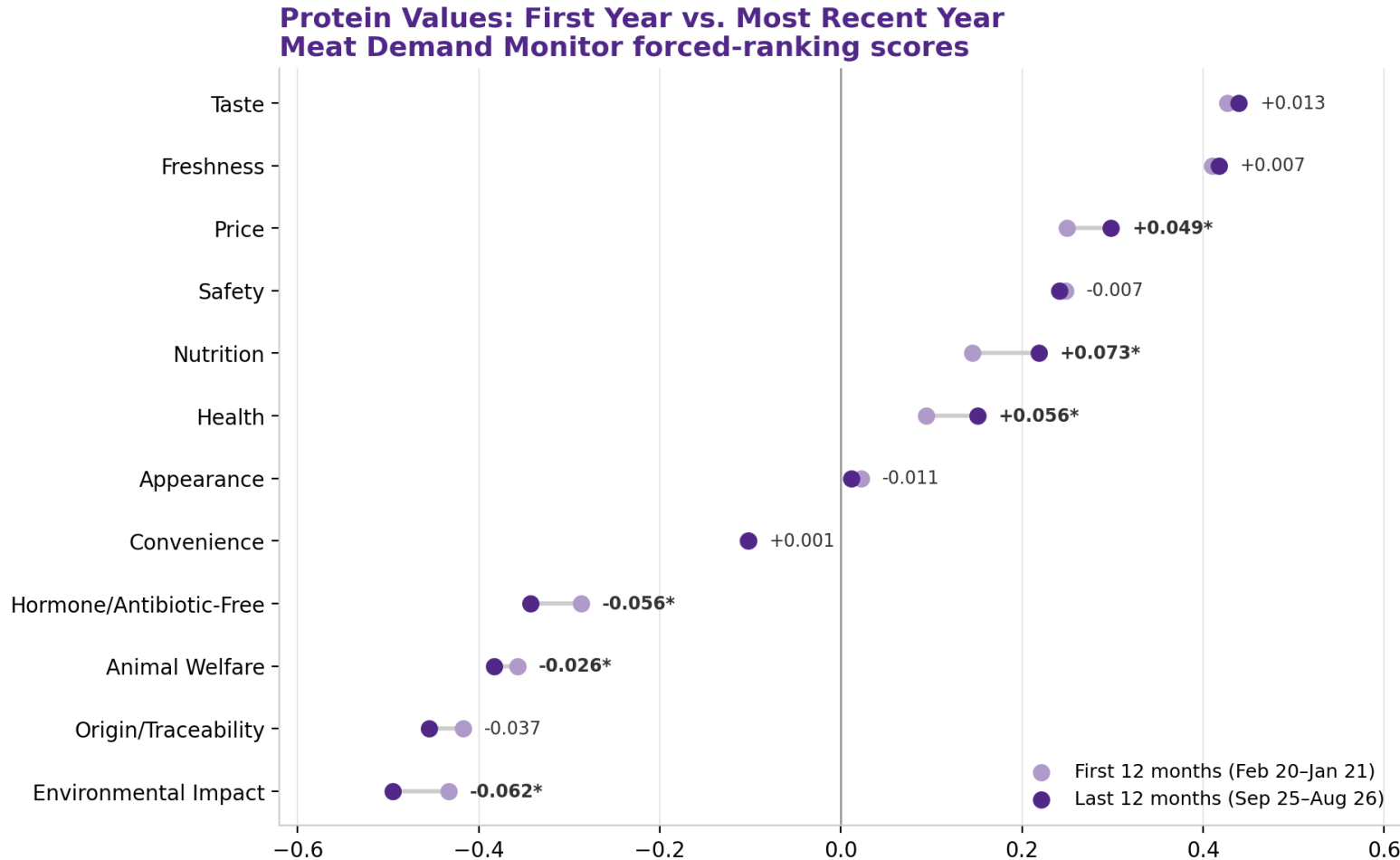
MEAT DEMAND MONITOR | KANSAS STATE UNIVERSITY

What Matters When Consumers Buy Protein

12-item forced-ranking Protein Values,
79 months: February 2020 – August 2026

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A Zero-Sum Measure of What Matters



Forced ranking, not standard Likert

Each respondent sorts 12 attributes: 4 most important (+1), 4 middle (0), 4 least (-1).

One attribute can rise only if others fall.

The order is stable

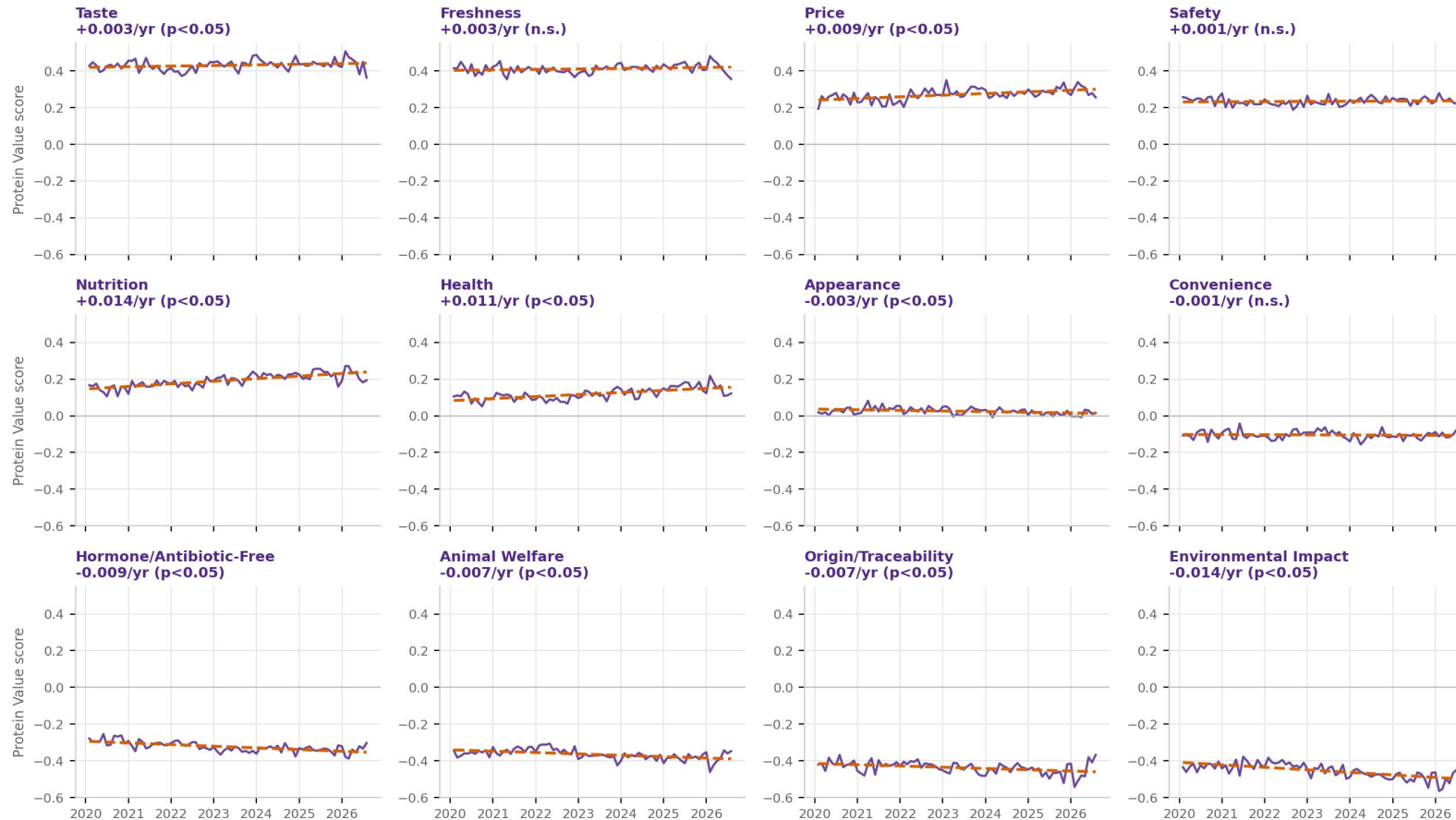
Taste, Freshness, Price, Safety on top and the four credence attributes on the bottom — in every one of 79 months.

But 6 of 12 moved significantly () between 2020 and 2026.*

* = Welch t-test $p < 0.05$ for first-12-months vs. last-12-months difference. Positive = among most important; negative = among least. Source: K-State MDM.

Price, Nutrition & Health Rose; Credence Claims Declined

Protein Values: 12-Item Forced-Ranking Scores | Meat Demand Monitor, Feb. 2020 – Aug. 2026



Zero-sum scores: each respondent marks 4 items most important (+1), 4 middle (0), 4 least (-1). Dashed line = OLS trend; 'significant' = trend p<0.05. Source: K-State MDM.

Significant risers

Nutrition +0.073,
Health +0.056,
Price +0.049

Significant decliners

Environmental Impact -0.062,
Hormone/Antibiotic-Free -0.056,
Origin -0.037,

Zero-sum logic: affordability and personal benefit crowded out societal claims.

TAKE-HOME MESSAGE

Eating experience sells meat; “affordability” is rewriting the middle of the list

79 / 79

Months in which Taste, Freshness, Price, and Safety ranked as the top four purchase drivers

+ / -

Price, Nutrition & Health importance rose significantly since 2020 while all four credence attributes (Environment, Origin, Animal Welfare, Hormone-Free) fell — a zero-sum shift toward affordability and eating experience/personal benefit.

6 / 12

Attributes that shifted significantly between the first and most recent year (3 up, 3 down) — and because the ranking is forced, every gain is a real substitution: consumers demoted one attribute to promote another.