

## CASE STUDY

# NPB Domestic Demand Strategy and Implementation



The path to long-term pork demand growth includes making pork relevant and relatable to younger generations. By featuring pork's versatility in flavor and as an ingredient, the Pork Checkoff-funded tool *Consumer Connect* will help the National Pork Board and value chain members reimagine pork in the marketplace and share the right information with the right people in the right place at the right time.

## PROBLEM

Pork's consumer base is shrinking, but that decline is reversible. Millennial and Gen Z consumers see pork as:

- Indulgent
- Intimidating to cook, specifically larger muscle cuts
- Inferior compared to proteins they grew up cooking and consuming

## SOLUTION

NPB conducted extensive market research to better understand changing consumer attitudes, preferences and habits. After completing an audit of current research to avoid duplication, the NPB team worked with a third party to develop the industry's seven consumer segments. Each segment is defined by its cohort's motivations, needs and emotions about pork.

By understanding each segment's unique attitudes and opportunities, NPB has identified four growth strategies:

- **Win Where We Are:** Keep pork consumers coming back.
- **Win Bigger:** These people consume pork regularly. Help them choose pork more often.
- **Incubate for Growth:** They buy pork, but barriers prevent them from choosing it more often. The usual tactics aren't effective, so it's time for a new approach.
- **Emerging Growth:** This is a small group, but it is growing fast. Prepare to serve them in the future.

**Segmentation results** came from this state-of-the-art research methodology<sup>1</sup> with increased focus on Gen Z, Millennial and multicultural consumers.



**19 ADVISORY  
& 10 WORKING**  
Group Members

**13**

Industry Stakeholder Interviews and a Hypothesis Session

**20 MILLION POSTS &  
5 MILLION POSTERS**

Analyzed for Online Anthropology Work<sup>2</sup>



**7,500+**

Consumer Online Quantitative Surveys

**60**

Consumers in a Five-Day Online Qualitative Community



**28 IN-DEPTH  
ONE-ON-ONE  
DISCUSSIONS**  
With Consumers



<sup>1</sup> Material, an insights, marketing and technology company.

<sup>2</sup> Material Plus Online Anthropology methodology designs, collects, unifies and analyzes online data sets to create a unified view of human behavior. The approach can explain what is happening with customers, trends and media and help clients make better, faster decisions.

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**Fresh Data:** % of Fresh Pork Dollar Sales (Annually)

20.9%	17.1%	18.5%	15.1%	9.3%	9.8%	9.3%
23.3%	18.0%	16.0%	13.8%	12.5%	9.8%	9.3%

**Processed Data:** % of Processed Pork Dollar Sales (Annually)

Source: NPB Checkoff Funded Proprietary Research, Material, Consumer Segmentation Study, 2023    Source: Numerator Insights Shopper Panel, Calendar Year 2023

NPB created a series of playbooks. Each is a deep dive into our market research findings and how they connect to a holistic consumer strategy that is actionable through research-backed, psychographic segments of consumers. To date, NPB has met individually with 13 packers/processors, 10 retail partners and three foodservice providers with the playbooks in hand.

Since the playbooks' launch in May, value chain members have used the research to ideate menus and limited-time offers; research brand development and innovation; and position and sell products to reach customers through digital media. NPB has allocated funds for activations with leading retailers in low-pig, high-population states.

In 2025, NPB and its board of directors will launch a nationwide consumer campaign with NPB Consumer Connect as a building block to strategically become more relevant and relatable with consumers.



[Learn more at porkcheckoff.org](http://porkcheckoff.org)

