Investigating the high income South African consumer's perception towards beef and sheep meat

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LSM 9 and 10 represented 16.5% of the adults in South Africa in 2013 mainly residing in urban areas. Their contribution to national food expenditure is estimated at 35%, while they contribute an estimated 43% of total beef expenditure and 60% of expenditure on mutton/lamb (BFAP, 2014).

An extensive survey questionnaire, containing a wide range of research questions, was developed and tested. Due to the meat scandal in April 2013 the data gathering phase was postponed for a few months in consultation and approved by the RMRDSA-Planning Committee Cattle and Small Stock. The research targeted a stratified representative sample of LSM 9 and 10 consumers in Gauteng (n=249) (accounting for LSM groups, ethnicity and age) during September and October 2013. A professional panel recruitment agency identified suitable respondents and trained facilitators were used to complete the survey questionnaires (90 to 120 minutes per respondent). Data was captured, cleaned and then statistically analysed with SPSS 21.0 to develop descriptive statistics, comparisons of frequencies and averages, as well as other analyses such as cluster analysis.

The sample demographics were a good reflection of the actual composition of LSM 9 and 10. Comparing the survey results across LSM groups 9 and 10 few statistically significant differences were found between these two high LSM groups, implying good consistency in behaviour and perceptions.

When deciding on the meat to use in a meal, consumers' most important considerations were time available, followed by factors such as ease of cooking method and popularity in household. Meal preparation ideas came mainly from recipes, cooking familiar foods and friends. The most important cooking methods for beef and mutton/lamb were stewing and braaiing.

A significant 99.6% of the sample consumed beef and 90.4% mutton/lamb (compared to 100% for chicken). Fish and chicken were perceived as the healthiest animal protein food options.

The most frequently consumed foods (in order of importance) were eggs, chicken beef mince, cold meats, stewing beef, beef steak, tinned fish, beef sausage, mutton/lamb chops and fresh fish. In terms of red meat almost half of the sample (48.2%) indicated that they consume red meat 3 to 4 times per week during the main meal. Interestingly only 28.9% of the sample indicated that it is important to consume red meat regularly (3 to 4 times per week).

The results clearly indicated changing red meat consumption patterns. Even though a significant 99.6% of the sample consumed beef and 90.4% mutton/lamb (compared to 100% for chicken) many consumers indicated that they consumed less red meat than two years ago (29.3% for beef and 52.2% for mutton/lamb). The main drivers behind these changes are affordability, health concerns and fattiness of the meat. Mutton/Lamb is perceived as a luxury item.

Consumers' most positive perceptions regarding beef related to availability, preparation knowledge, tasty, versatility and good for entertaining. Consumers' most positive perceptions regarding mutton/lamb related to preparation knowledge, good protein source, tasty, versatile and good nutritional value. There was definite movement towards more chicken meat at the expense of beef and mutton/lamb, with 70.3% and 67.1% of the sample consuming less mutton/lamb and beef over time being replaced with higher chicken consumption.

When purchasing red meat, consumers' dominant decision factors for particular cuts focused mainly on food safety / hygiene (also including expiry date and clean meat), quality guarantees and sensory appeal (e.g. general appearance, taste, colour of meat). Price was a dominant factor for mutton/lamb which could be expected given the high price of the product. It is critical to ensure that the red meat product offering on South African retail shelves address these basic aspects as minimum requirements (i.e. satisfying consumers' needs for safe, quality and tasty red meat products within a value-for-money context). In addition to these aspects consumers' more sophisticated needs towards 'advanced' quality attributes (such as hormones in meat, animal welfare concerns) should also be addressed, particularly since these attributes might become more important in the future.

The red meat information sources consulted by consumers were dominated by family, friends, recipe books, food labels and TV. Among these options family, friends and recipe books are trusted by respondents. Interestingly, even though health professionals (doctors and dietitians) are highly trusted among respondents they are not among the top 5 most used options. This could be due to the expense associated with obtaining information from health professionals.

A significant 94.8% of the sample bought take-away food, with chicken dominating their take-away food choices (52.6% of sample) followed by beef (28.6%). Restaurant meals were purchased by 76.7% of the sample associated with consuming beef (36.3%), fish/seafood (19.4%) chicken (14.3%) and pork (12.5%).

Recommendations for future research focused on the geographical expansion of the consumer research, more comprehensive data mining towards strategic marketing recommendations, the implementation of repeated surveys over time and further research into consumers’ views on sustainability issues.