

Investigating the low income consumer's perception towards beef and sheep meat

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Research focus area:	Consumerism, Market development and Trade

Full Title

A survey to investigate the SA consumer's perception towards red meat (beef and sheep meat) - focusing on LSM 1-4

Aims of the project

- To determine the current meat purchasing and consumption behaviour of the low LSM consumer
- To determine the behavioural motivations and perceptions towards red meat in low LSM consumer
- To determine the current and most trusted information sources on red meat for the low LSM consumer To compile and publish a comprehensive booklet on the nutrient content of South African beef offal

Executive summary

The study done in Limpopo was used as a pilot to inform the bigger consumer survey study in Gauteng. Results from this study were published in Food Security (see list of outputs).

The overall project objective was to investigate the dynamic South African red meat consumers from the South African marginalised class (LSM 1-4) residing in the Gauteng province of South Africa, with a specific focus on meat purchasing and consumption behavior; behavioural motivations and perceptions; and consumers' current and most trusted information sources on red meat.

Primary data was gathered by means of a consumer survey based on a comprehensive questionnaire. The research targeted a stratified representative sample of LSM 2 to 4 consumers in Gauteng (n=166) (accounting for LSM groups, ethnicity and age) during March 2013. Professional panel recruitment 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 to develop descriptive statistics, comparisons of frequencies and averages, as well as other analyses such as cluster analysis.

Comparing the survey results across LSM groups 2 to 4 it was clear that very few statistically significant differences were found between these three low LSM groups, implying consistency in behaviour and perceptions.

Even though a significant 95% of the sample consumed beef and 63% mutton / lamb (compared to almost 100% for chicken) it was interesting to observe that the results indicated that it was more likely for low income households to consume animal foods 3-4 times per week than it was to consume red meat as often (e.g. 79% of the sample has some possibility to eat animal protein foods 3 to 4 times per week, while only 64% of the sample has some possibility to eat red meat 3 to 4 times per week).

Considering respondents' consumption frequencies for various animal protein food types:

- Eggs were consumed most often (average consumption frequency around 2 to 3 times/week);
- Followed by chicken feet, chicken livers, polony, chicken giblets, boiled chicken, chicken heads and fried chicken (average consumption frequencies around once per week);
- Followed by canned fish, viennas, Russians and boerewors (average consumption frequencies around twice per month);
- Followed by beef liver, stewing beef with bone, beef kebabs, beef steak, chicken roast, fresh fish, beef mince and beef pies and samosas (average consumption around once/ month).

Considering the low LSM samples' typical consumption quantities per meal occasion, the results indicated the following:

- Dominance of chicken meat and beef sausage, followed by beef meat, eggs, chicken head and feet, chicken livers, beef offal and fresh fish (with about one cup of the food type consumed per occasion per family of about 4);
- Followed by tinned fish, mutton/lamb meat, canned meat, polony, cold meats, goat, lamb offal, and pork (with about half a cup of the food type consumed per occasion per family of about 4);

Affordability (strongly dominant) and health perceptions had a very strong influence on consumers' choices and behavior regarding animal protein foods.

There was definite movement towards more chicken meat at the expense of beef and mutton/lamb, with 79% and 74% of the sample consuming less mutton/lamb and beef over time being replaced with higher chicken consumption.

Positive red meat perceptions involved preparation (versatility, know how to prepare, easy to cook, good for entertaining), availability and for some consumers – nutritional value (a nutritious meat and a good quality protein source), taste and tenderness. Negative red meat perceptions focused particularly on affordability, fat content, cholesterol, long cooking time and cause of health problems.

The most popular red meat cooking methods were stew, frying and boiling. And consumers typically indicated longer cooking times (e.g. 50% of sample spending over 50 minutes in meal preparation).

The dominant red meat decision factors of the low LSM sample focused mainly on affordability and value for money, appearance (including meat colour), convenience (including ease of preparation) and hygiene. It is critical to ensure that the red meat product offering on South African retail shelves address these basic aspects as minimum requirements followed by more advanced product quality attributes. A huge challenge to industry in this regard is to enhance the appeal of more affordable beef and mutton/lamb cuts that might fall within the budget of these poorer households.

The best channels to target low LSM consumers with information regarding red meat (with high usage and high trust levels) are family, mass media (radio, TV, newspapers, magazines), health professionals (doctors) and government channels (Public Health Recommendations)

Only about 20% of the sample purchase take-away meals more than once a month while a third do not purchase take-away meals at all. Chicken dominates the take-away preferences of the low LSM consumers.

Recommendations for future research focused on the geographical expansion of the consumer research, more comprehensive data mining towards strategic marketing recommendations and the implementation of repeated surveys over time