Consumer perception and innovation in goat and sheep products. 
First results of iSAGE project

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Why Do We Eat What We Eat?

- Custom, Culture, Habits?
- Availability?
- Price?
- Health?
- Taste, Flavour
- Pleasure
- Reward, Indulgence
- Entertainment
- Ritual
- ...

Which is the most important???
Most common factors affecting food consumer behaviour

Source: Font i-Furnols & Guerrero, 2014
Consumer perception & preference goat & ewe cheese

- Very little English-language literature exists
- Lahne et al. (2013) show that consumer liking is affected by cheese type, information, familiarity (neophobia) and consumer’s level of food involvement.
- Consumer attributes (profile) and context affect liking more than product attributes.
Consumer perception & preference goat & sheep meat

- More abundant literature, but only on lamb & sheep meat, especially by Spanish researchers

- Most relevant pre-purchase attributes:
  - Visual appearance (colour, fat content, etc.)
  - Familiarity or habits of consumption
  - Country-of-origin
  - Quality Labels (PDO, organic)
  - Price

- Most relevant post-purchase:
  - Taste, texture & smell
The Omnivore’s Paradox

• According to Claude Fischler, anthropologist, humans need a lot of variety of food to eat (even vegetarians are omnivores…) but are mainly “risk averse” (neo-phobic), and are sceptical towards novel foods (e.g. GMOs, exotic foods, nutraceuticals, etc.).

• Given average consumers are neo-phobic, familiarity plays an important role in food consumption

• This have implications on the acceptance of innovation in the food sector
iSAGE Consumer Research Objectives

I. Explore consumers awareness, attitudes and preferences attitudes towards livestock-based food products (meat, dairy) as well as overall consumer acceptance of goat and sheep animal products.

II. Identify consumer needs, sensory aspects and attitudes towards novel recipes and innovations.

III. Explore consumer motivations for buying or not buying goat and sheep animal products.

IV. Investigate consumer preferences by means of hypothetical choice situations (choice experiments) to quantitatively assess consumer attitudes and preferences to sheep/goat products.

V. Identify and describe innovative approaches to animal and supply chain management and marketing.
Qualitative consumer research

• Method:
  
  • Focus groups on consumer awareness, attitudes and preferences towards meat/dairy and sheep/goat animal products
  
  • Means-End Chain and Laddering research on consumer motivations & barriers
FGs Sample

- 2 Dairy FGs + 2 Meat FGs (IT, UK, FI, ES, FR, GR, TR) = 285 respondents

- Age: 64% (25-45), 36% (46-65);

- 57% Female, 43% Male

- 64% Employed, 36% Non-employed;

- 8-12 individuals for each focus group (1 mini-FG in FI)
DAIRY PRODUCTS
Dairy products = specialty goods

• In most countries ewe/goat cheese seen as a “special meal” suitable for special occasions not for daily consumption
  • especially used for cooking (i.e. pasta, salads, lasagna, traditional recipes etc.) or consumed as a main dish or as dessert

• Other dairy products (milk, yogurt) have minimal awareness/consumption
  • only few consumers purchase goat milk

“In my view, pecorino cheese is a treaty and linked to transgression & enjoyment… by contrast cow’s-milk cheese is for regular and daily consumption” (IT, F, Reg)
Low product knowledge

• Feta cheese perceived as goat cheese in most countries excl. Greece & Turkey
• Low consumer product knowledge in most countries

“When I go to Italy, I buy Parmesan cheese (…), that I actually do not know if it is made from ewe milk or not” (ES, M, Occ)
Availability

• In some countries consumption is often affected by low availability

“Even if I wanted to drink goat milk regularly it is not as easy to find as cow milk in supermarkets” (GR, F, Reg)

“I buy goat cheese, but I think that there exist remarkably few in Finland” (FI, F, Reg)
Authenticity & naturalness

• Consumer perceive goat/ewe dairy products as more authentic, less “industrialized” and natural (aka “organic”) than cow milk dairy
  • Especially for direct farmer’s purchases

“Artificial feeds are used in cattle production but goats and ewes are fed with natural feeds or they graze freely. Therefore, their milk is tastier, organic, natural and healthier.” (TR, M, Reg)
Shopping Habits

Four main channels:

1. Directly from local farmers/processors, \( \rightarrow \) cheaper AND high quality/authentic (IT, TR, GR)
2. small groceries/specialized shops,
3. supermarkets \( \rightarrow \) cheaper & convenient… BUT lower quality and less variety (ES, UK);
4. food exhibitions, festivals, farmers’ market etc.

“I like to buy pecorino cheese at the farmer’s...but for everyday the supermarket is ok!” (IT, F, Occ)

“I buy my cheese from the producer that I know” (TR, M, Occ)

“I go to Lidl, because there is always a cheese on offer and I buy it. Each week they put a different cheese on offer and that is the one I buy” (ES, M, Occ)
Attitudes

**Likes**
- Unique Taste
- Versatility
- Sheep and goat freely graze (less industrialized)
- Healthier compared to other dairy products (cow milk)

**Dislikes**
- Poor information on product labels
- High price and small variety
- Taste/Smell
- Fatty not for daily consumption
Overcoming barriers to increase purchases

• *Price* reduction (really????)
• New *packaging* (i.e. smaller portions)
• Improving *availability and range* (e.g. less product rotation and higher range especially at supermarkets)
• Increasing *consumers’ awareness* regarding health benefits associated to the consumption of ewe/goat dairy products
• Improving food *information* on product labels
• Advertising on tv, magazines or newspapers (i.e. celebrity testimonials or TV cooking programs)
## Dairy Products: Attitudes towards innovations (WP4)

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<th>Innovation</th>
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<td>1</td>
<td>Improve pasture quality</td>
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<td>Improve meeting animal requirement and feed supply</td>
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<td>More sound and scientific proven use of antibiotic alternatives in feeding</td>
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<td>Use of sensor ear-tags as welfare indicators</td>
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<td>Develop new breed traits to increase longevity, fertility, and health in flocks</td>
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<td>Development of new vaccines</td>
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<td>10</td>
<td>Implementation of automatic milk machine (similar to robot used in dairy cattle)</td>
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<td>Freeze dried ewe/goat milk</td>
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<td>Use of milk products for cosmetics and probiotics</td>
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<td>Omega 3 dairy enriched products</td>
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<td>Use of vegetable rennet in cheese making</td>
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<td>New recipe books and chefs’ involvement to increase product use</td>
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<td>Home deliveries of dairy products directly from farms/dairies</td>
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MEAT PRODUCTS
Mainly lamb!

• Most consumers preferably consume lamb meat than other sheep/goat cuts;
  • Preference for local meat (FI: only imported meat);
• only few buy whole or half lamb (from the producer) and freeze it…it is cheaper!
  • Most use different cuts (easy to prepare);
Occasional consumption

• Occasional consumption in all countries
• Consumptions linked to traditions and special occasions (e.g. Christmas and Easter periods (excl. TR) or Sunday lunch with family)
  • Even perceived as a “luxury” meal (UK, GR)

“There is a barbeque tradition on river side. People make picnic and consume meat during weekend” (TR, M, Reg)

“A sheep leg with potatoes in the oven is an impressive meal if I have guests over at my house” (GR, F, Occ)
Not easy to cook

• Especially among the youngest
• **Convenience** issue: people think sheep/lamb meat takes longer to cook

“I must admit I don’t cook much, just easy things, so regarding lamb, I usually buy chops that are very easy to cook” (ES, M, Reg)
Natural, authentic & healthier

• Many recognise lamb/sheep meat is probably more natural & healthier, though perceived as too fat for regular consumption

“I reduced the purchase of meat in general…I usually purchase beef meat because it is less fatty but I know that lamb meat is better in terms of authenticity” (IT, M, Reg)

“Chicken [meat] smells because the way of raising and feeding is not healthy.” (TR, F, Reg)
Animal welfare

• Most consumers associate higher animal welfare to lamb/sheep meat (e.g. compared to chicken meat)

• Free-range “perception”

• “I never buy chicken meat, I prefer lamb or sheep meat for their naturalness and taste!” (IT, F, Reg)
Shopping Habits

• In general, farmers and butcheries are preferred for perceived higher quality
• Consumers who prefer to buy from supermarkets mentioned three reasons:
  • lower prices as compared to the local butcher and farmers,
  • more control of products and
  • less time for shopping

“I would never consider buying sheep/goat meat from a supermarket or from a butcher whom I don’t know personally” (GR, F, Occ)

“I purchase at the supermarket because I can’t purchase a whole lamb, and I always don’t have time, little cuts are enough for me” (ITA, M, Reg)

“We know the butchers and their meat. That is, from where the meat is coming, how the animals have been raised…” (TR, M, Reg)

“At the butcher, the price is too high. It is not necessary to go there!!” (FR, F, Reg)
Attitudes

Likes

- Unique taste
- Sheep and goat raised more naturally
- More genuine and authentic

Dislikes

- Fatty
- High cooking skills required
- Less variety and availability
- Taste not familiar to young people
Overcoming barriers to increase purchase

- **Price reduction** (not for all consumers):
  “If I was sure that the meat was Greek I would definitely pay a higher price to buy it” (GR,F, Occ)

- Improving **availability and range**:
  “We never saw kid or goat meat in the shop!” (FR, M, Reg)

- **New products**, new packaging or new meat cuts

- Some consumers (from IT, GR, TR, UK) suggested **more information** to increase awareness (i.e. knowing how animals were reared, use of antibiotics, traceability etc.):
  “If it is true that these [sheep & goat] meats can positively influence my health, I want to know it and I believe that this info could increase purchases” (IT, F, Occ)

- Others indicated **advertising** on tv, magazines, VIP testimonials, TV cooking programs
# Sheep/Goat Meat: Innovation

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<td>Innovation in halal slaughtering</td>
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<td>Stress free slaughter for improved meat quality</td>
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<td>Extension of home-slaughtering beyond own consumption for small-medium</td>
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<td>Use labels to provide more information to consumers about the origin,</td>
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The Means-End Chain Model

Product attributes are means to consumers to obtain desired end values through the consequences or benefits yielded by those attributes.

(Gutman & Reynolds, 1979; Gutman, 1982)
Means-End chain: an example

- **Terminal value**: taking care of family
- **Instrumental value**: I am responsible towards my family
- **Functional consequence**: calming feeling to do something for my family
- **Psycho-social consequence**: I assume more vitamins
- **Abstract attribute**: fresh product
- **Concrete attribute**: harvested 3 days ago

**Abstract attribute**
- harvested 3 days ago
- fresh product
- I assume more vitamins
- calming feeling to do something for my family
- I am responsible towards my family
- taking care of family

**Terminal value**
## Work in progress

Only Spanish results shown

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<td>ES-NC-M</td>
<td>SPAIN NON-CONSUMER MEAT</td>
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Consumers Dairy (cut-off 2)
Non-Consumers Dairy (cut-off 2)
Consumers Meat (cut-off 2)
Non-Consumers Meat (cut-off 2)
Concluding Remarks

• Still work in progress. Next step will be a quantitative survey in Europe to measure acceptance and WTP of selected innovations.

• **Uniqueness of taste** is a plus but also a minus for both dairy/meat sector.

• Combining this perception with the fact **familiarity** is usually an issue when innovation is concerned, new or existing but only locally known products need to be marketed around this attribute.

• Sustainability & naturalness is another relevant attribute especially for meat.
Concluding remarks

• To overcome the barriers to purchase marketing is very important:
  • USP based on exotic/unusual/distinguishing features (dairy): see success of kiwi, feta, sushi bars, as example. Locally: goat milk icecream
  • USP based on already existing perceptions of authenticity, local and naturalness (meat): not only PDO or organic, but specific marketing effort or comparative advertising with other meats in terms of sustainability
  • Business models are very important, too.
Ideas for discussion

• **Fact:** The small ruminants unprocessed meat (but, also cheese) sector is mainly unbranded.
  - You have generic/PDO cheese names (like feta, pecorino), or PDO labels in meat, but no real renown brands
  - Even organic label is generic, although it increases value added

• **Hypothesis:** Introducing and marketing (even collective) **brands** and **fancy packaging** may be a strategy to increase sales especially in the meat sector. Even for **unprocessed** meat.
Examples of unprocessed meat brands

- Aberdeen Black
- Amadori
- Agnei ibérico
- Jimba Premium Quality Australian Lamb
- Opal Valley
- Cedar Springs Fresh American Lamb
- Lava Lake Lamb Delicious Grass-Fed
Nice to meat you

• There is nothing as little seducing than meat. Dead flesh and blood are not really sexi, unless for those watching the *The walking dead*...

• So why not working on sexi packaging?
Sustainable packaging for organic meat

MEATY PACKAGING
The packaging is completely biodegradable, being treated with water proof starch spray means that the paper is completely nonabsorbent, preventing any unsightly damp spots and discoloration.

1. Rigid absorbent layer
2. Grease proof paper
Thank you!

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