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Current consumer attitudes towards lamb and beef in Europe

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SUMMARY – Consumers have evolved rapidly in the last 10 years in response to socio-economic, cultural and ethical changes. The red meat industry is suffering from low credibility due to health scandals, etc. and has been slow to respond to changing consumer expectations. In order to restore consumer confidence in red meat, it is vital to understand and attend to their evolving demands for safety and quality. Using focus group discussions in five EU countries, consumer attitudes to certain aspects of lamb and beef consumption were recorded and compared. The issues for analysis were: (i) trends in consumption of lamb and beef (in and out of the home); (ii) factors influencing lamb and beef consumption; (iii) quality issues and quality meat products; and (iv) sources of information.

Key words: Lamb and beef, consumers, meat quality, focus groups.

RESUME – *"Attitudes actuelles des consommateurs envers les viandes ovines et bovines en Europe". Au cours des 10 dernières années, les préoccupations culturelles, éthiques et socio-économiques ont profondément modifié les attentes des consommateurs. La crédibilité du secteur des viandes rouges a été atteinte par des crises sanitaires. La réponse aux nouvelles attentes des consommateurs a été tardive et partielle. Pour rétablir la confiance des consommateurs envers les viandes rouges, il est nécessaire de comprendre et de caractériser l'évolution de la demande pour la qualité et la sécurité. Des groupes de discussion ont été réunis dans cinq pays de l'Union Européenne, pour déterminer et comparer les attitudes des consommateurs envers les viandes bovines et ovines. Les points suivants sont analysés : (i) tendances de la consommation de viande bovine et ovine (au foyer et hors foyer) ; (ii) facteurs influençant ces consommations ; (iii) préoccupations sur la qualité des viandes ; et (iv) sources de l'information sur la qualité des viandes.*

Mots-clés : *Viande ovine, viande bovine, consommateur, qualité des viandes, groupes de discussion.*

Introduction

Today, consumers are evolving rapidly in response to socio-economic changes and evolving cultural and ethical values. Consumers are becoming more demanding about the type of food they buy and the preferred attributes and expected quality of the red meat they buy and consume. If food, and meat in particular, is to be successfully marketed it has to meet changing consumer expectations.

In addition, the concept of quality is dynamic. There are several perceptions of quality for beef and lamb (Grunert, 1997) that depend on different attributes (physical, assurance, packaging, production systems, origin, etc.). Quality is interpreted differently by various operators in the industry (producers, processors, retailers) and by consumers, leading to ambiguity and failure to transfer information effectively between them. Production trends have been moving towards bigger and more technologically driven *filières*, which has had the effect of distancing consumers from producers, creating suspicion and misinformation about the production and transformation processes. Recent food scares have heightened this phenomenon. At the same time, niche markets for specialist, quality meat products (QMPs) are developing where consumers satisfy subjective needs in areas such as ethics, health, animal welfare, natural elaboration, environmentally friendly production, local origin, etc. (Sylvander and Melet, 1992; Grunert *et al.,* 1996; Nienhaus, 1996).

The objective of this paper is to identify current consumer attitudes and demands in relation to red meat consumption and perception of meat quality. This paper is part of a research project whose principle objective is to stimulate markets for beef and lamb through the delivery of a system of quality assurance across the all stages of the *filière*. Improved knowledge of the consumer is the first step.

Materials and methods

Focus group (FG) discussions were held in: Edinburgh and Cirencester, UK; Zaragoza in Spain; Reggio Emilia in Italy; and Perpignan in France. They were designed to collect data on beef and lamb consumption and consumer's perception of quality in the areas studied. FG research is a standard qualitative research methodology in which a group of participants discuss ideas and solutions in relation to the subject being studied (Knodel, 1998; Kumar *et al.,* 1999). The number of participants (consumers) per FG was 8, 7, 9, 11 and 9 respectively, with ages ranging between 27 and 60 years. Participants were randomly selected from people responsible for buying meat for the family. Discussions lasted around 1.5 hours and were recorded and transcribed into a qualitative data management software package for coding and analysis.

The following subject areas were covered: (i) trends in consumption of lamb and beef (both in and out of the home); (ii) factors which influence lamb and beef consumption; (iii) quality issues for lamb and beef and quality meat products (QMP); and (iv) information sources on the product. The FGs were designed to identify the main consumer issues relating to purchasing behaviour and attitude to lamb and beef. These issues will go forward to an extensive consumer survey in five EU countries.

Results and discussion

The results presented should be considered as interim results. These are summarized in Table 1.

Consumption of lamb and beef

The type of meat generally consumed by the participants in the FGs differed between the four countries. In the UK beef was consumed more often at home and lamb was seen as an expensive product. The Spanish group preferred local traditional lamb. In Italy, white meat was preferred to red meat (half of the participants admitted eating beef only twice or three times a month). In France, participants liked variability in the type of meat. Participants with families with children had a different model of meat consumption: they ate more meat and had a more diversified diet. Meat consumption was seen to be decreasing in families with older members. Older people cared more for meat quality and declared: "too much meat is not healthy for us".

In the UK, the trend was to buy everyday cuts from supermarkets, but special occasion meat from the butcher where quality is considered better and more consistent. In Spain and France, most participants bought all meat from a traditional butcher because "they trusted him". Conversely, Italian participants bought most meat in super/hypermarkets, where they felt meat to be more hygienic, better packed, more convenient to buy, had a better range and choice, and more competitive prices.

Eating out also differed in the five locations. In the UK participants liked to try different foods in restaurants. In Spain, participants ate out seldom and felt food prepared at home was generally better. In Italy, participants chose meats prepared in a particular or time-consuming way but generally meat was not taken when eating out. In France, participants chose familiar "classic preparations" when eating out.

Factors which influence meat consumption

Qualitative factors influencing consumption had similarities in the four countries (Table 1), although it is not possible to establish the relative importance of these at this stage of the research. Factors included taste, nutritional benefits, tradition and origin (especially in Scotland and Spain). A low fat content was important for Italian and younger UK consumers. Low price was an important factor for the Italians and the English, whereas Scots, Spanish and French participants suggested price was not a critical factor when choosing meat, as they bought "less meat but of a higher quality". "Quality" was variously defined between locations.

In general, participants worried about health and security issues when consuming meat. The British admitted to be concerned after BSE and *E.coli* scares, particularly consumers with children. The Spanish and British admitted worrying more about meat than other foods and were aware of genetically modified products (GMPs). Italians trusted white meat more because they felt red meat (beef) "could be more toxic". French participants thought that hormones, antibiotics and other additives should be banned.

Quality issues for red meat and quality meat products

Factors that characterized meat quality were largely similar in all FGs. Colour was first, though colour preference differed between countries. In Scotland bright red was considered false suggesting additives or a lack of maturation. A natural red was preferred for beef. In Spain, intense red or brown was not appreciated and consumers preferred a "pinkish" colour. In Italy an intense red colour was liked, but not brown. The latter was not considered fresh. A strong smell was disliked everywhere. British and French participants favoured a marbled appearance (fat) in beef for flavour. The Spanish preferred fresh, rather than mature meat. They also refused "cheap" meat and considered origin to be a very important quality attribute. Italian participants cared more about freshness, a low fat content and type of packaging. Ready frozen meat was not appreciated by any of the participants in the five locations.

Some UK participants were confused, ignorant and/or mistrusting of the number of current assurance schemes covering meat quality. They felt that an independent body or consumer group, not government, should control meat safety and quality. The Spanish felt that the government was responsible for guaranteeing safety and quality but they thought that farmers should also be responsible for delivering these. Italian participants put their trust the public health services. All participants said they would pay more for a better level of assurance, quality and information relating to the beef and lamb meat and meat products that they purchased.

In general, QMPs were known, but there was often a lack of information on the specific attributes of these products. There was some suspicion about the message delivered by these products. Italian participants thought that biological meat products were "expensive and not so genuine". For Italian participants, price was a very important factor. A number of Italian participants suggested that if animals are not fed with adulterated additives (in feed) and are reared in a natural way, then meat should be safe and QMPs should not be needed.

Information sources

In general participants complained about the lack of clear consistent information on assurance, meat quality and QMPs. More information was sought by all participants: the British wanted information on "eatability", production methods, and animal welfare; the Spanish, days of maturation, farmer and origin; the Italians, more nutritional (calories, etc.) and origin information; and the French, information on production and processing, details of health implications and control of "taste" quality.

While results presented above show a number of common attitudes held by European consumers towards red meat and meat products, there are also many regional/national specificities that need to be addressed if the aim is to develop pan-European standards on quality and safety in red meats.

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Table 1. Summary of consumer views from FGs on: consumption, factors influencing consumption, quality of meat and information sources

Subject	Edinburgh and Cirencester (UK)	Zaragoza (Spain)	Reggio Emilia (Italy)	Perpignan (France)
Consumption trends for lamb and beef	-Beef consumed more than lamb -Children prefer chicken -Non-meat meals thought to be healthy -Higher quality meat in butcher, supermarket quality more variable -Butcher shops declining -Will try new dishes when eating out, e.g., lamb, fish -Trust restaurants	-Lamb preferred -Children prefer lamb and eat more meat -Trend for less meat but more quality, more demanding consumer -Most people buy meat in butchers, more confidence in butchers -Consider food at home better than in restaurants	-White meat preferred -Families with children eat more meat -Red meat (beef) is not consumed very much -Majority buy meat in super/hypermarkets, butchers disappearing in some areas -Normally don't consume meat in restaurants	-Liked variability in type of meat -Good beef not available -Children don't generally affect choice -Home freeze to ensure quality in all seasons -Most people buy meat in butchers, some doubt supermarket quality. Also buy from producers -Like high quality food out
Factors influencing consumption	-Taste, nutrition, balanced diet, origin and price are issues for English. Scots rate "satisfaction" highly -Like short shopping and cooking time (weekdays) -BSE/*E.coli* fears among people with children, less for older people. Concerned about GMPs	-Taste, nutrition, balanced diet, origin and tradition - price not important -Most people care more about meat than other foods, especially after the BSE crisis. Worried about GMPs	-Taste, freshness, consistency, balanced diet, easy to cook, low fat content and price -Meat thought to be more toxic than other foods. White meat less dangerous. BSE concerns, also dioxin and hormones	-Taste (flavour), and convenience when purchasing are very important. -No restrictions of nutritional factors, price is not an issue -Hormones, anti-biotics, etc. should be banned
Quality issues/factors for lamb and beef and quality meat products	-Positive: colour - red but not bright, flavour, tender, not a strong smell, maturity, marbling, presentation -Negative: frozen meat, large range of schemes for assurances/labelling are causing confusion -Like quality guarantees from independent body/ consumer groups, not the government -Willing to pay for quality -QMPs: liked because of origin, assurance, production methods. -Suspicious of messages supermarkets deliver	-Positive: colour - red but not dark, taste, tender, origin, price (not special offers), butcher presentation not so important -Negative: frozen or dry and hard meat, water in cooking -Government and farmers responsible for safety -Willing to pay for quality -QMPs: liked because: guarantee, promotion, presentation & origin. Would like more information	-Positive: freshness, colour - intense red not dark, lean, normal packing (not vacuum), origin (Argentina) -Negative: frozen meat, strong smell, old meat -Trust public control checks on safety and quality -Willing to pay for assurance/informatio n -QMPs: some brands are well known but still reluctant to buy these products. Doubts about biological meat	-Positive: colour, fat for flavour, species, age, type of cut, method of cooking -Negative: frozen meat, vacuum packed and opaque packaging -No worries about hygiene when buying direct from breeder -QMP's are very well known and quoted in general. Trust if given to local brands first
Information sources/ additional information liked	-Media: TV, magazines, etc. important -Additional information: organoleptic information, information on method of production, welfare, assurance certification	-Butcher is the main source of information -Additional information: liked on items such as: days of maturation, farmer and origin	-Would like information on labels/packaging, and information brochures to be available -Information on nutritional data (fat content, calories, etc.) and also origin	-Breeder and butcher, not general advertising -From supermarket - want inf. on origin, date of packing/consumption -Want more inf. on origin, feeding, rearing and taste control but not on animal welfare

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