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**MEAT & LIVESTOCK**  
A U S T R A L I A

## **Meat Expectations 2003**

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# Agenda

- **Research Overview**
- **5 pillars of demand**
- **Purchasing**
- **Consumption**
- **Cooking methods and styles**
- **Fat trimming**
- **Summary**

# Research Overview



# Background

- Meat and Livestock Australia are interested in tracking changes in main grocery buyers' beef and lamb purchase and consumption patterns.
- In 2003, Meat and Livestock are interested in determining if there has been any changes in red meat consumption and purchase patterns since 2001.
- This study also looks at usage and attitudes towards red meat in terms of cooking methods, styles and fat trimming

# Methodology

**What?** ■ Telephone Interviewing (CATI methodology)

**Where?** ■ 5 Capital cities (Sydney, Melbourne, Brisbane, Perth and Adelaide) – 100 Interviews per city

**Who?** ■ Main grocery buyers of 18 years of age or older

■ Wave 1 – November 2000

**When?** ■ Wave 2 – November 2001

■ Wave 3 – August 2003

# Sample Profile

	2003 (n=500) %	2001 (n=500) %	2000 (n=1001) %
<b><u>Gender</u></b>			
Male	25	27	25
Female	75	73	75
<b><u>Age</u></b>			
18-24 years	7	9	8
25 – 34 years	18	18	20
35 – 44 years	25	19	20
45 – 54 years	20	21	23
55 years or more	30	33	29
<b><u>SES</u></b>			
White collar	62	61	57
Blue collar	38	39	43

# Sample Profile

	2003 (n=500) %	2001 (n=500) %	2000 (n=1001) %
<b><u>Children at home</u></b>			
Yes	45	39	49
<b><u>Number of people in household</u></b>			
One	18	19	13
2 – 3 people	53	51	52
4 – 5 people	24	26	30
6+ people	4	3	4
<b><u>Age groups</u></b>			
Generation X (18-34)	25	27	28
Baby Boomers (35-54)	45	40	43
Matures (55+)	30	33	29

# 5 pillars of beef demand



# There is strong faith in authorities' protection of beef

Could you tell me how much you agree with the following statements about beef.

## Beef Integrity

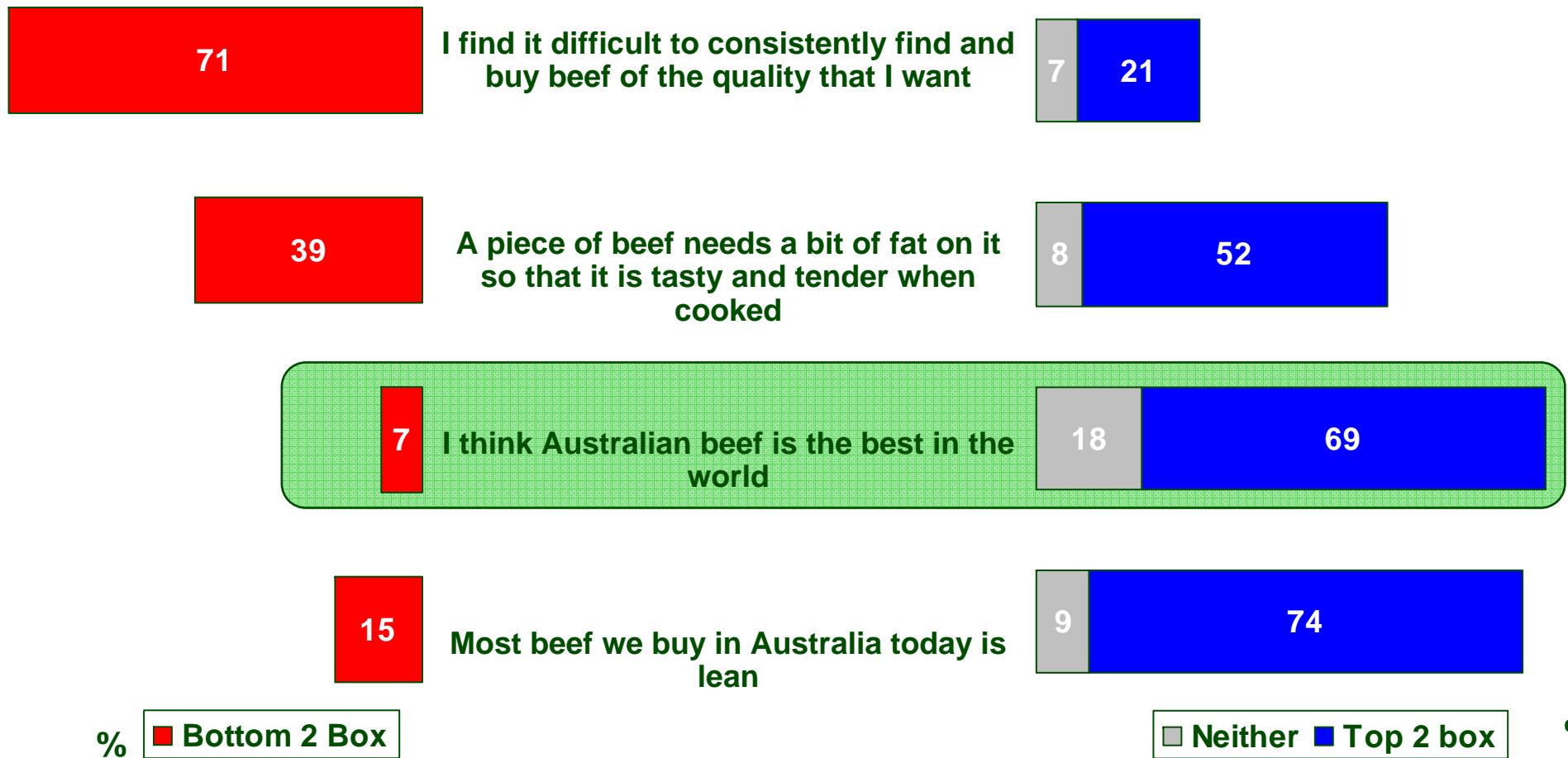


Base: All buying beef: 2003 (n=467)

# In Australia, Australian beef is popular

Could you tell me how much you agree with the following statements about beef.

## Beef Enjoyment



Base: All buying beef: 2003 (n=467)

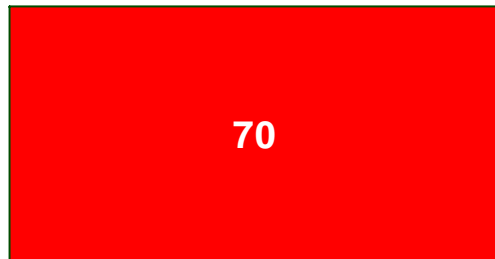
## While health is a key concern it is being delivered

Could you tell me how much you agree with the following statements about beef.

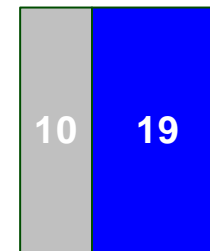
### Beef Nutrition



I think of beef as a healthy meat



The beef I buy nowadays contains too much fat



%

 Bottom 2 Box

%

 Neither  Top 2 box

Base: All buying beef: 2003 (n=467)



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# Educating consumers about selection and cooking of beef could generate further interest in beef

Could you tell me how much you agree with the following statements about beef.

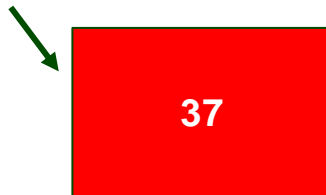
## Beef Convenience



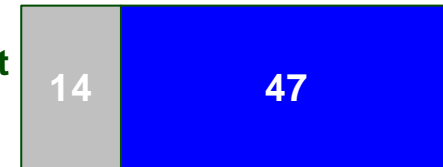
When comparing two pieces of uncooked beef I find it difficult to tell which one is going to be more tender



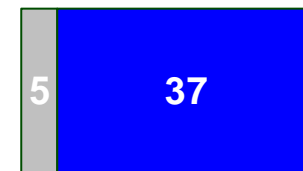
29% in 2001 Some returning to traditional butchers – are they then struggling to get such wide choice?



I have no trouble finding the quality of beef that I want because my butcher selects it for me



I don't buy certain beef cuts because I don't know how to cook them properly



%

 Bottom 2 Box

%

 Neither  Top 2 box

Base: All buying beef: 2003 (n=467)

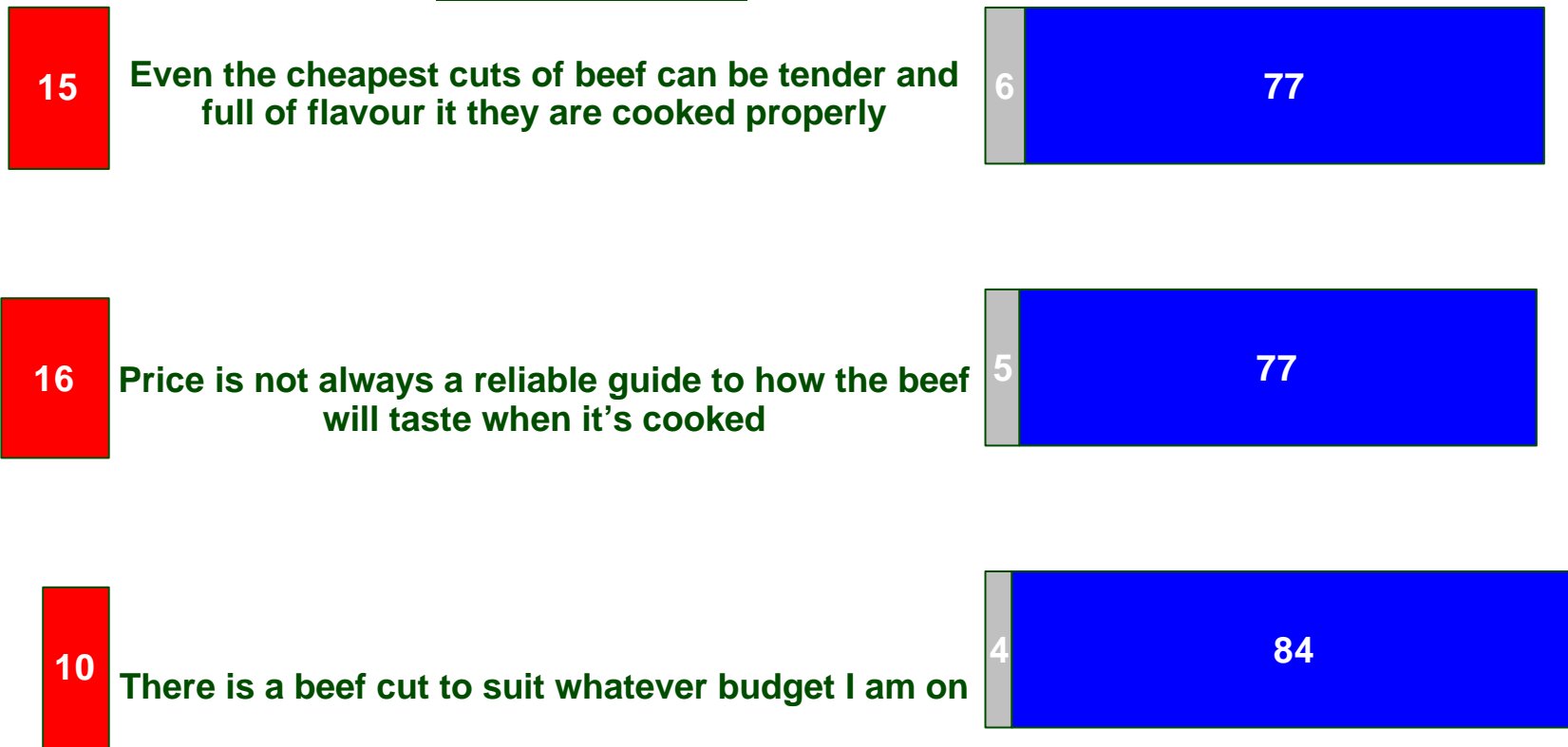


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# Price is not assumed to determine quality

Could you tell me how much you agree with the following statements about beef.

## Beef Value



%

■ Bottom 2 Box

%

■ Neither ■ Top 2 box

Base: All buying beef: 2003 (n=467)

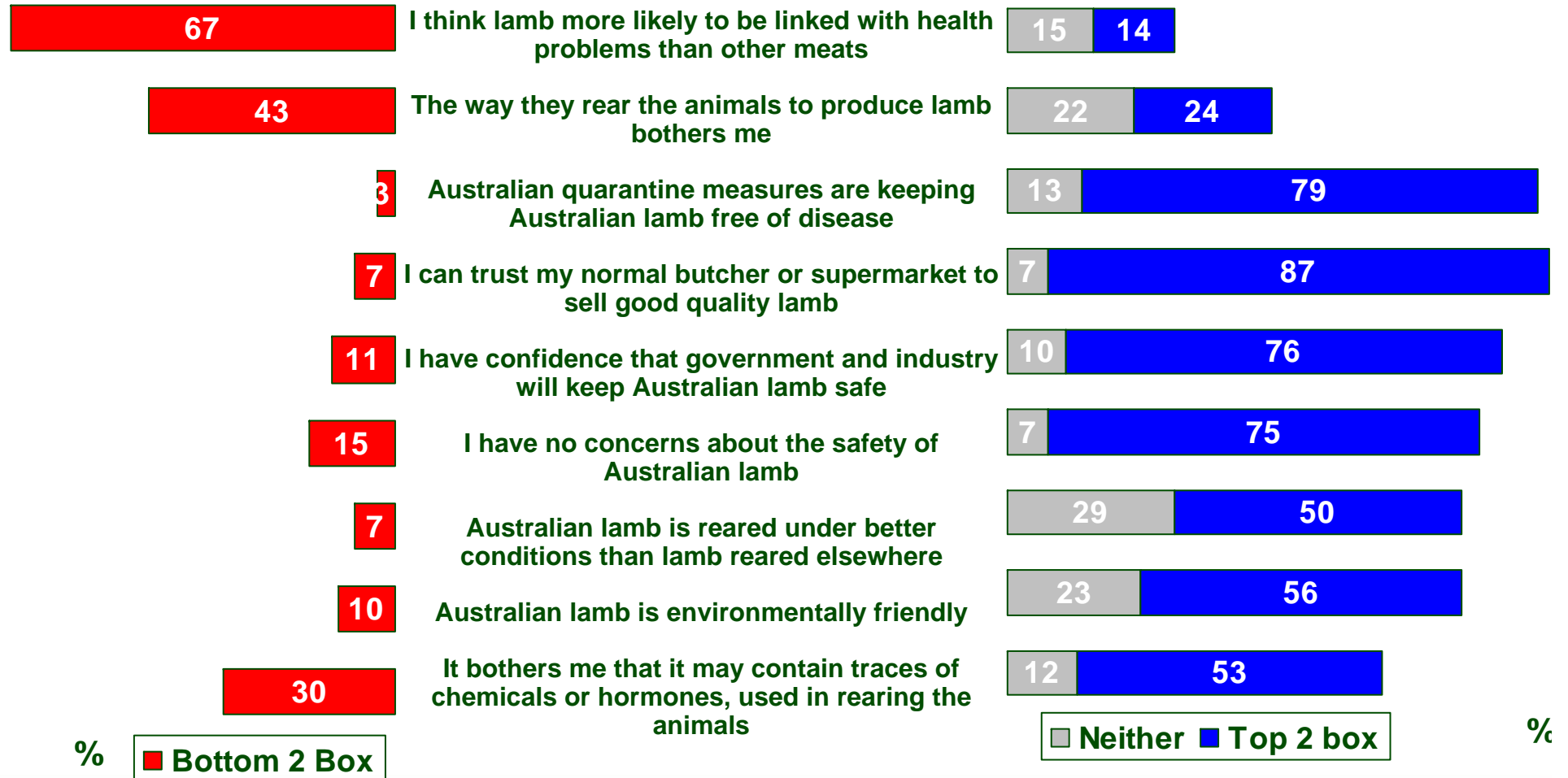
# 5 pillars of Lamb demand



# There is trust in the lamb industry but health demands are now stronger

Could you tell me how much you agree with the following statements about lamb.

## Lamb Integrity



Base: All buying lamb: 2003 (n=424)

# Opinion is split on the role of fat with lamb

Could you tell me how much you agree with the following statements about lamb.

## Lamb Enjoyment



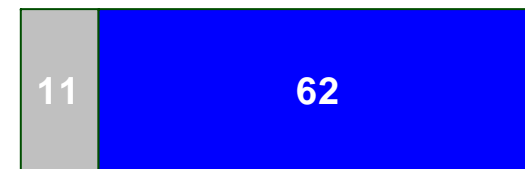
A piece of lamb needs a bit of fat on it so that it is tasty and tender when cooked



I think Australian lamb is the best in the world



Most lamb we buy in Australia today is lean



%

■ Bottom 2 Box

■ Neither ■ Top 2 box

Base: All buying lamb: 2003 (n=424)



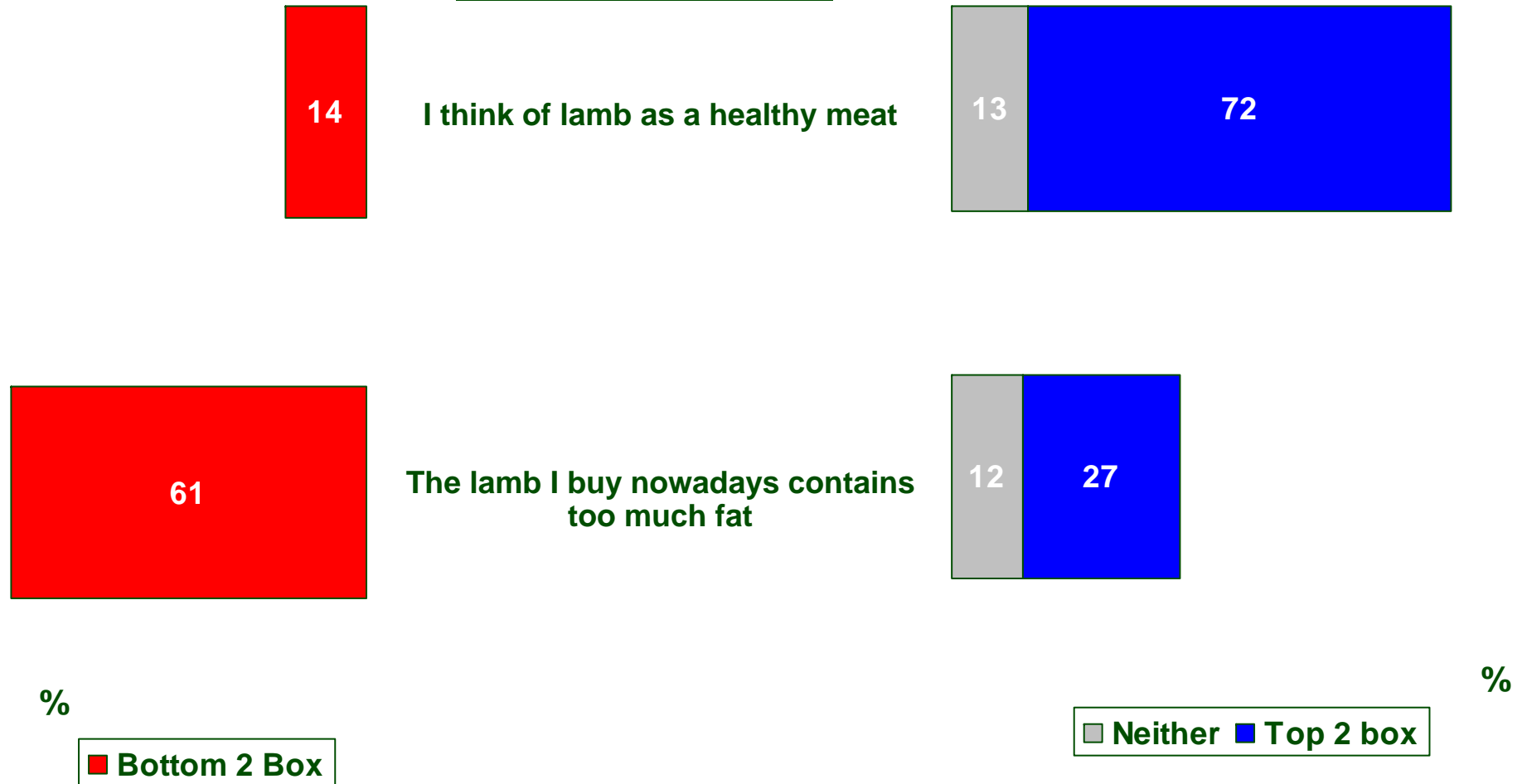
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## ...but the majority do see lamb as healthy

Could you tell me how much you agree with the following statements about lamb.

### Lamb Nutrition



Base: All buying lamb: 2003 (n=424)

# Educating consumers' use of lamb would be beneficial – but less so than for beef



Could you tell me how much you agree with the following statements about lamb.

## Lamb Convenience



Base: All buying lamb: 2003 (n=424)



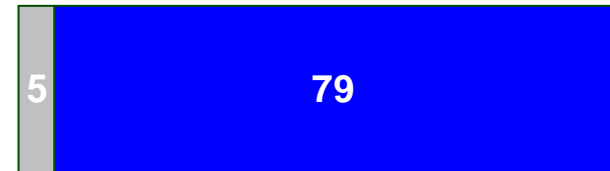
# Price is more of an issue with lamb

Could you tell me how much you agree with the following statements about lamb.

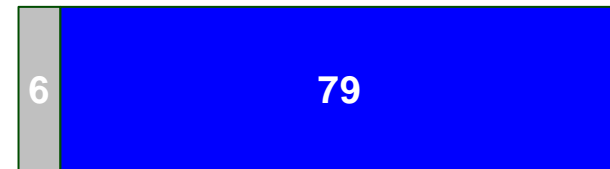
## Lamb value



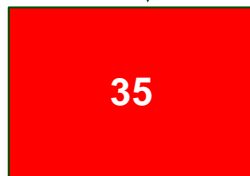
Even the cheapest cuts of lamb can be tender and full of flavour if they are cooked properly



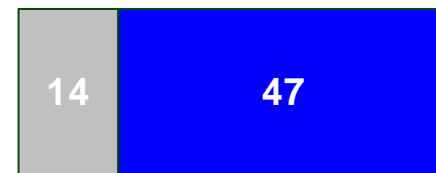
Price is not always a reliable guide to how the lamb will taste when it's cooked



25% in 2001



Lamb is really good value for money



%

%

■ Bottom 2 Box

■ Neither ■ Top 2 box

Base: All buying lamb: 2003 (n=424)

# Meat Purchasing

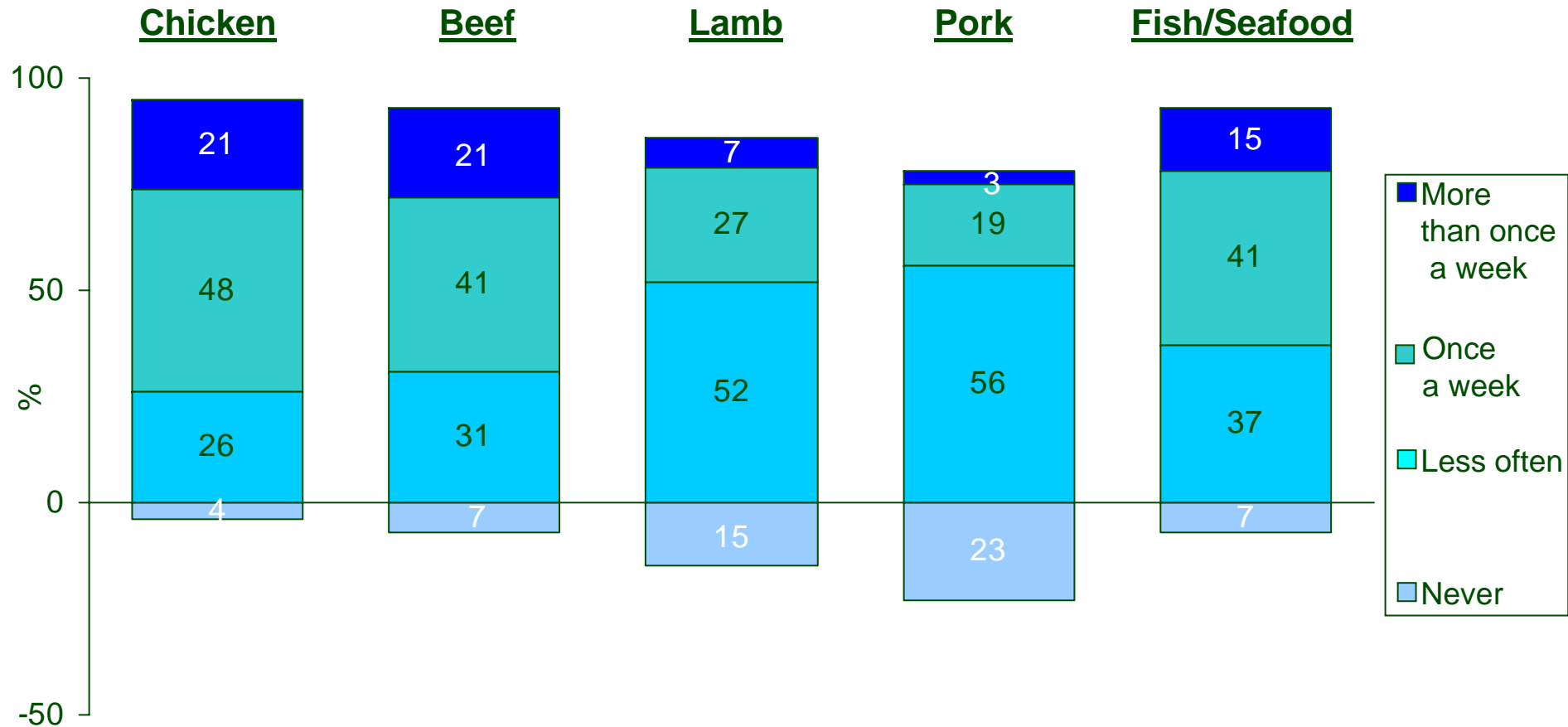


## Meat purchasing remains steady

- **There is only slight variation in purchasing amounts**
  - ↪ Slight increase in amount of claimed beef purchase
  - ↪ Slight decrease in amount of claimed lamb purchase
- **MGBs are considering a wider range of aspects when making meat purchases**
- **Health is becoming a more important factor in decision making for younger MGBs for both beef and lamb**
  - ↪ Younger MGBs' lamb purchase is more influenced by price than for older
- **There is some return to using traditional butchers**
  - ↪ Woolworth's and Coles continue to dominate the market

# People buy beef and chicken more often than other meats

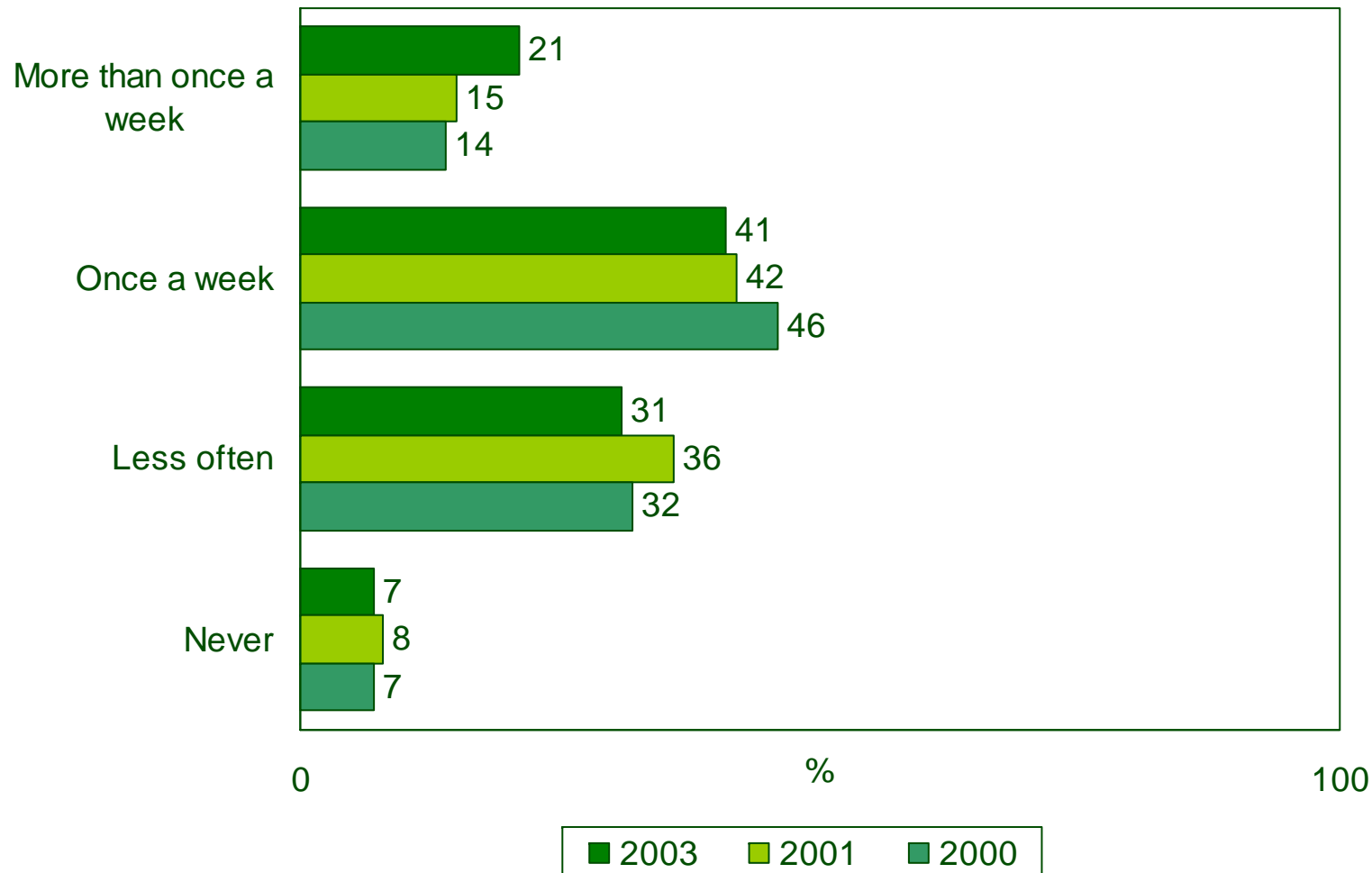
How often would you say you buy (.....) on average?



Base: All grocery buyers, n=500

## Nowadays people are purchasing beef more often

*How often would you say you buy Beef on average?*



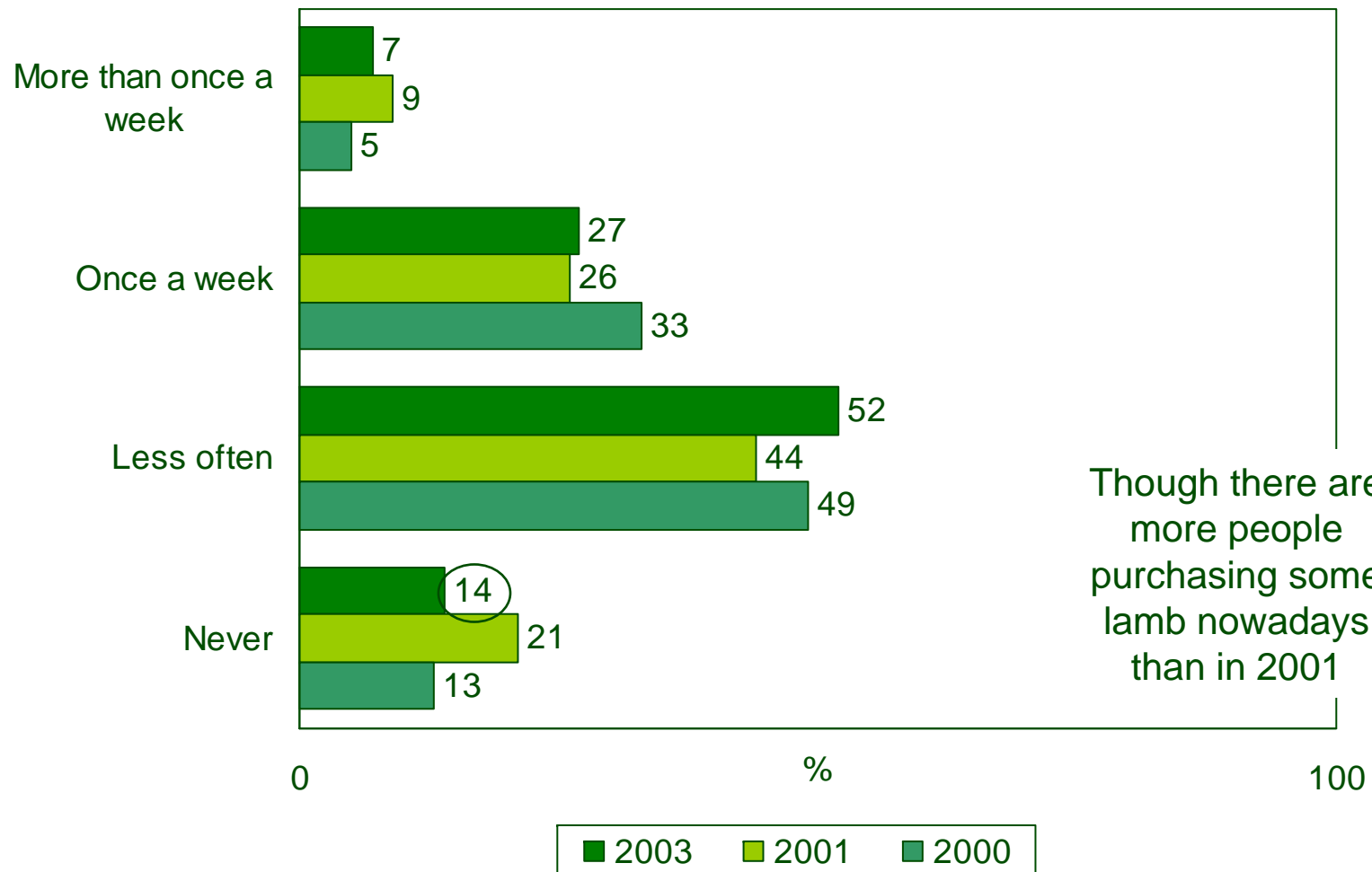
*Base: All respondents: 2003 (n=500), 2001 (n=500), 2000 (n=1001)*



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## Nowadays people are purchasing lamb less often

*How often would you say you buy Lamb on average?*

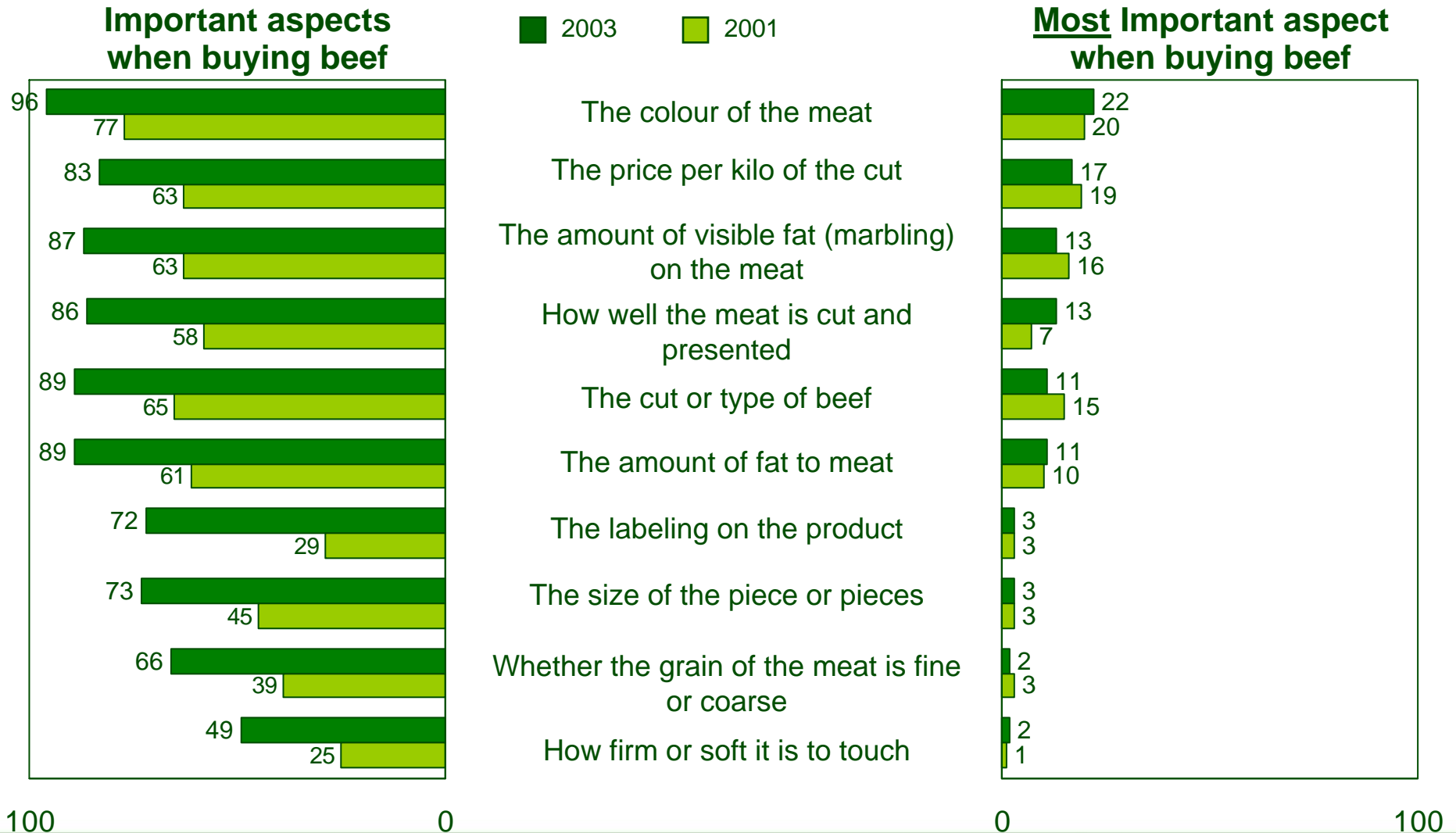


Base: All respondents: 2003 (n=500), 2001 (n=500), 2000 (n=1001)



# People are becoming more fussy with their beef selection

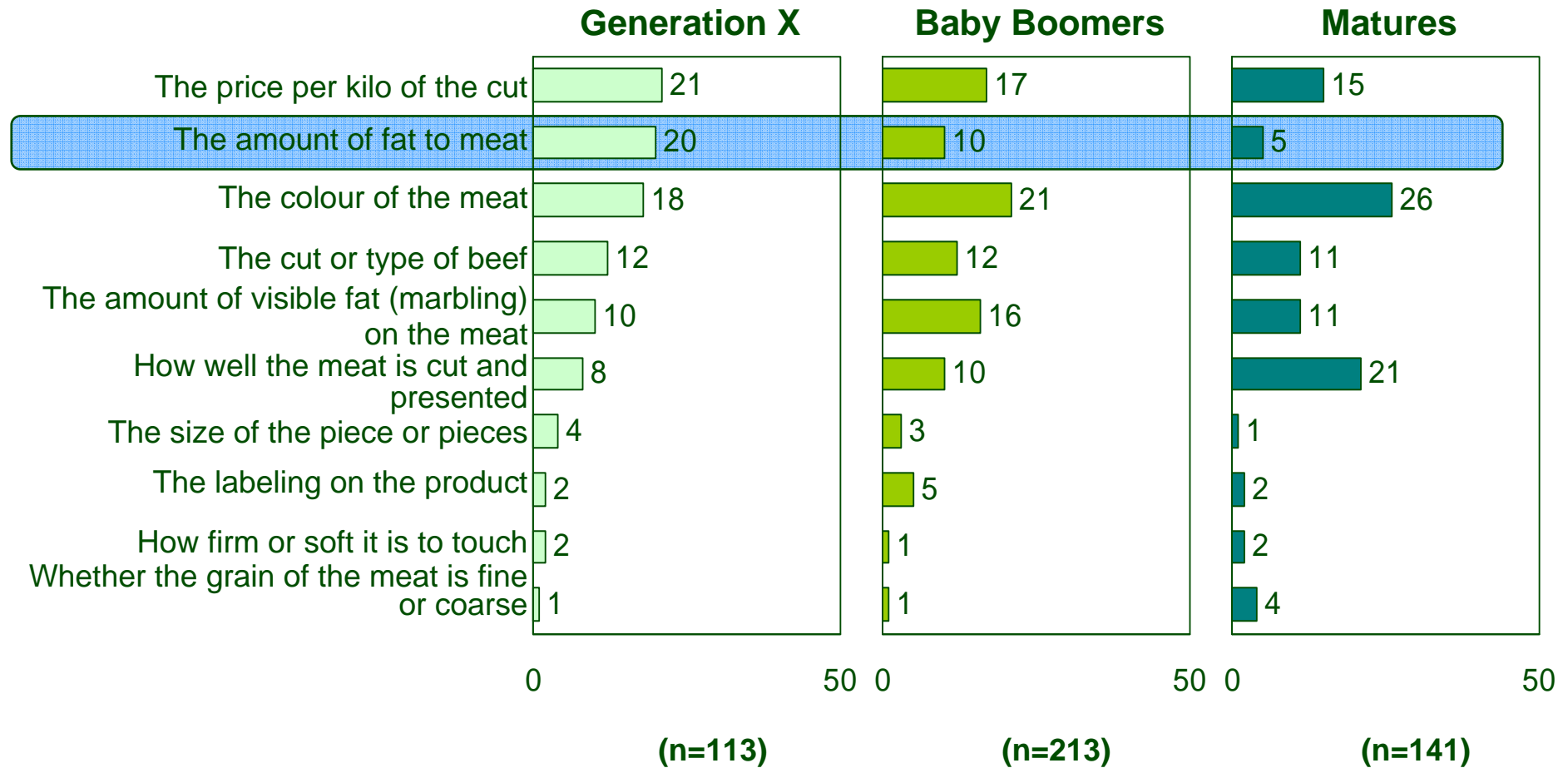
Which of the following aspects are important when you are buying BEEF?



Base: All buying beef: 2003 (n=467), 2001 (n=466)

## Health is of more importance for younger people

*And which one of those aspects is most important overall?*



Base: All buying beef: 2003 (n=467), 2001 (n=466)

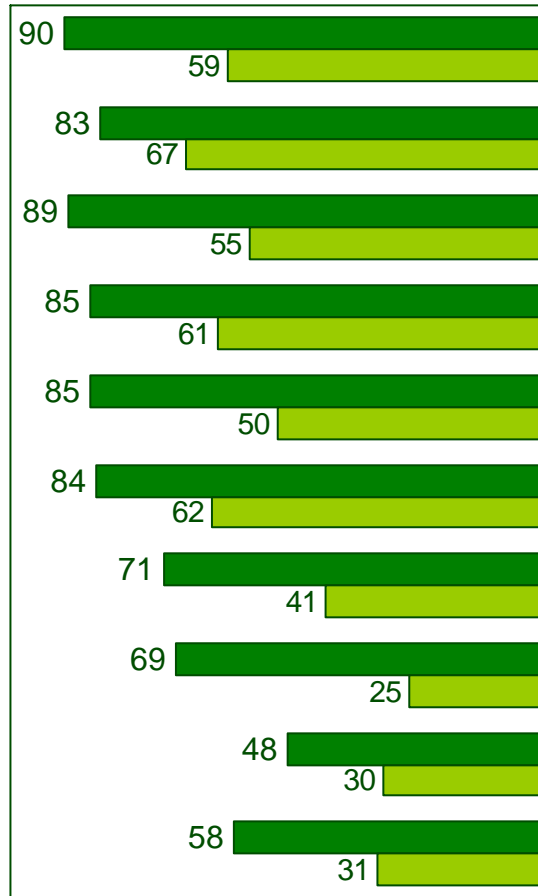


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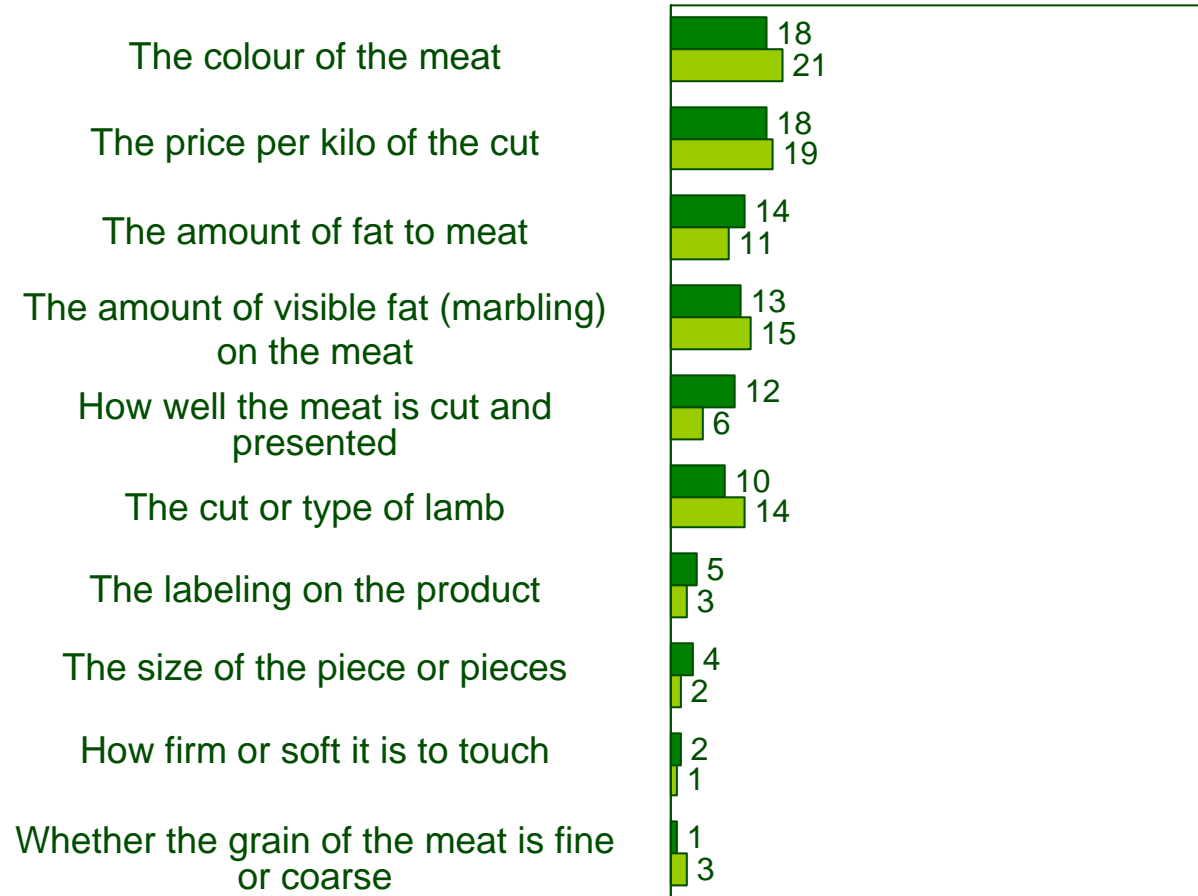
# People are becoming more fussy with their lamb selection

Which of the following aspects are important when you are buying LAMB?

**Important aspects when buying lamb**



**Most Important aspect when buying lamb**



100

0

0

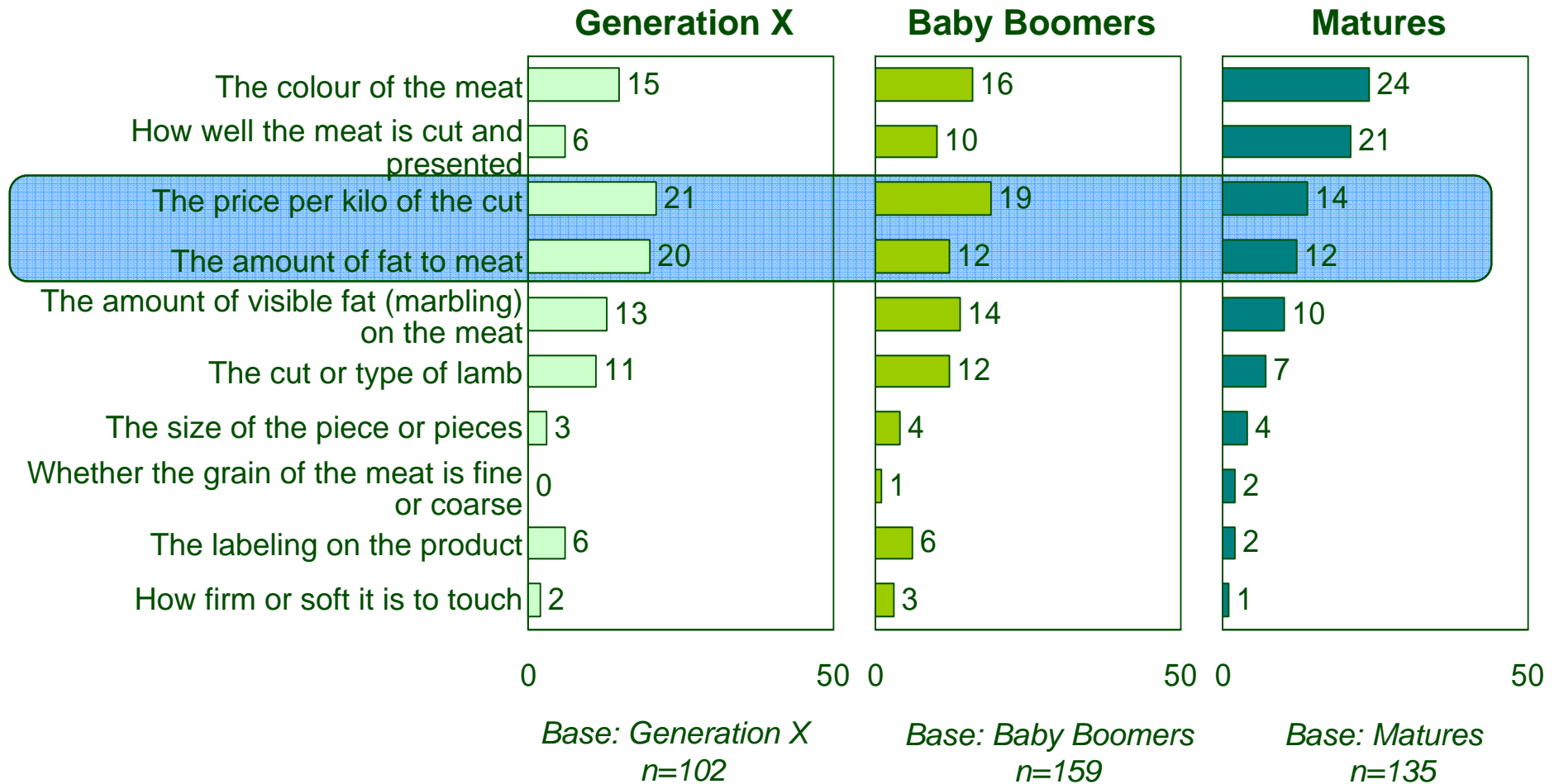
100

Base: All buying lamb: 2003 (n=424), 2001 (n=402)



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# The younger MGBs tend to focus on the price and health aspects in lamb

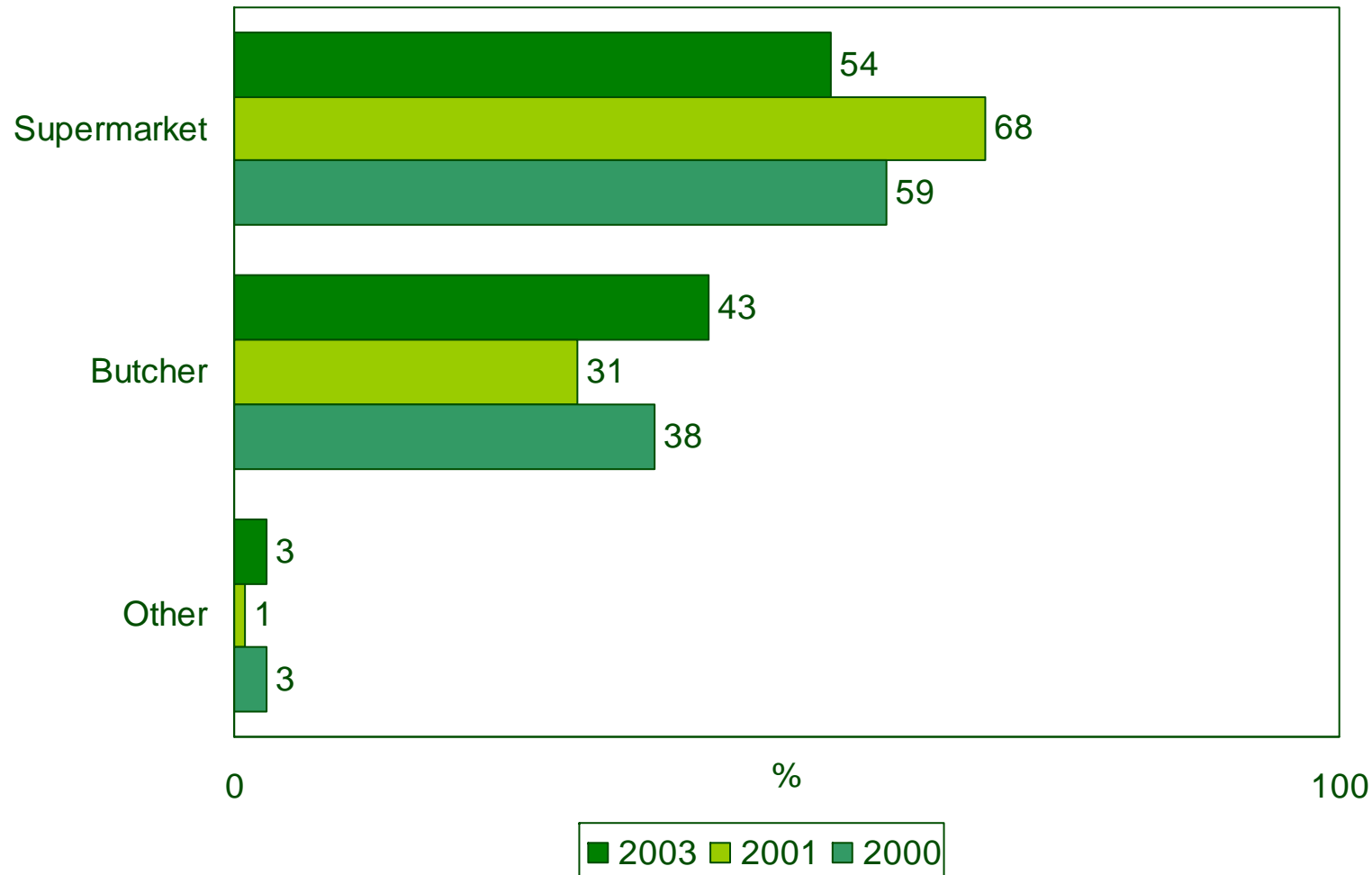


Base: All buying lamb: 2003 (n=424)



## People are returning to buying beef from butchers

*Where do you mostly buy your red meat, that is, beef and lamb?*



Base: All buying red meat 2003 (n=477), 2001 (n=476), 2000 (n=949)

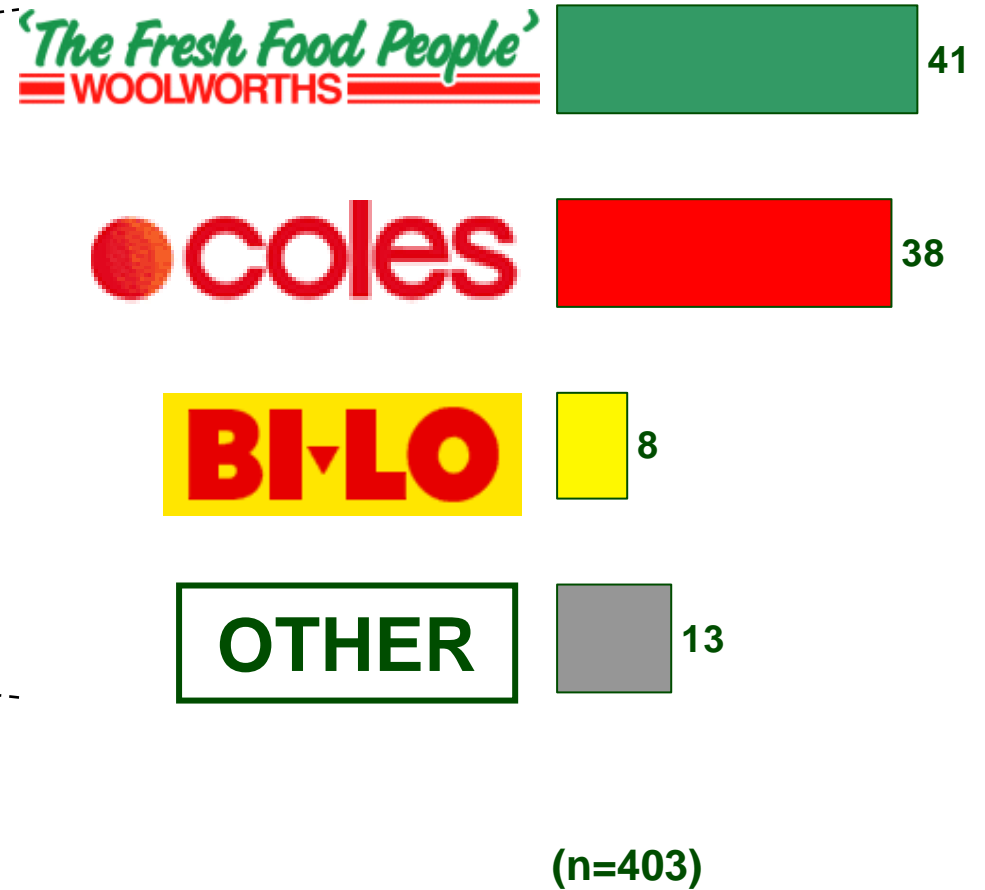
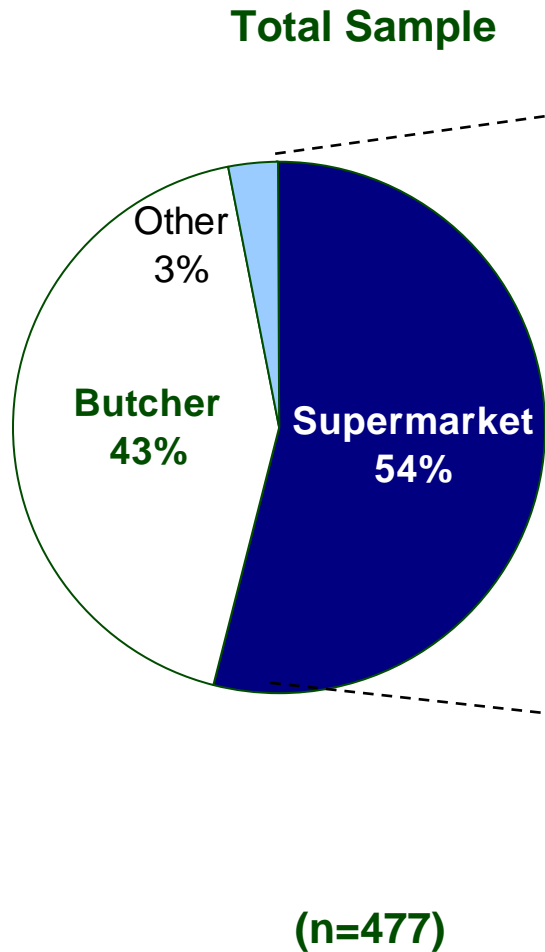


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## Coles and Woolworths continue to dominate the market

Where do you mostly buy your red meat, that is, beef and lamb?

Which supermarkets do you mostly buy your red meat?



Base: All buying red meat 2003 (n=477)

# Older people who buy beef at supermarkets prefer to shop at Woolworths

Where do you mostly buy your red meat, that is, beef and lamb?

Matures 55Yrs +



(n=143)

(n=115)

Base: All buying red meat 2003 (n=477)

# Meat Consumption





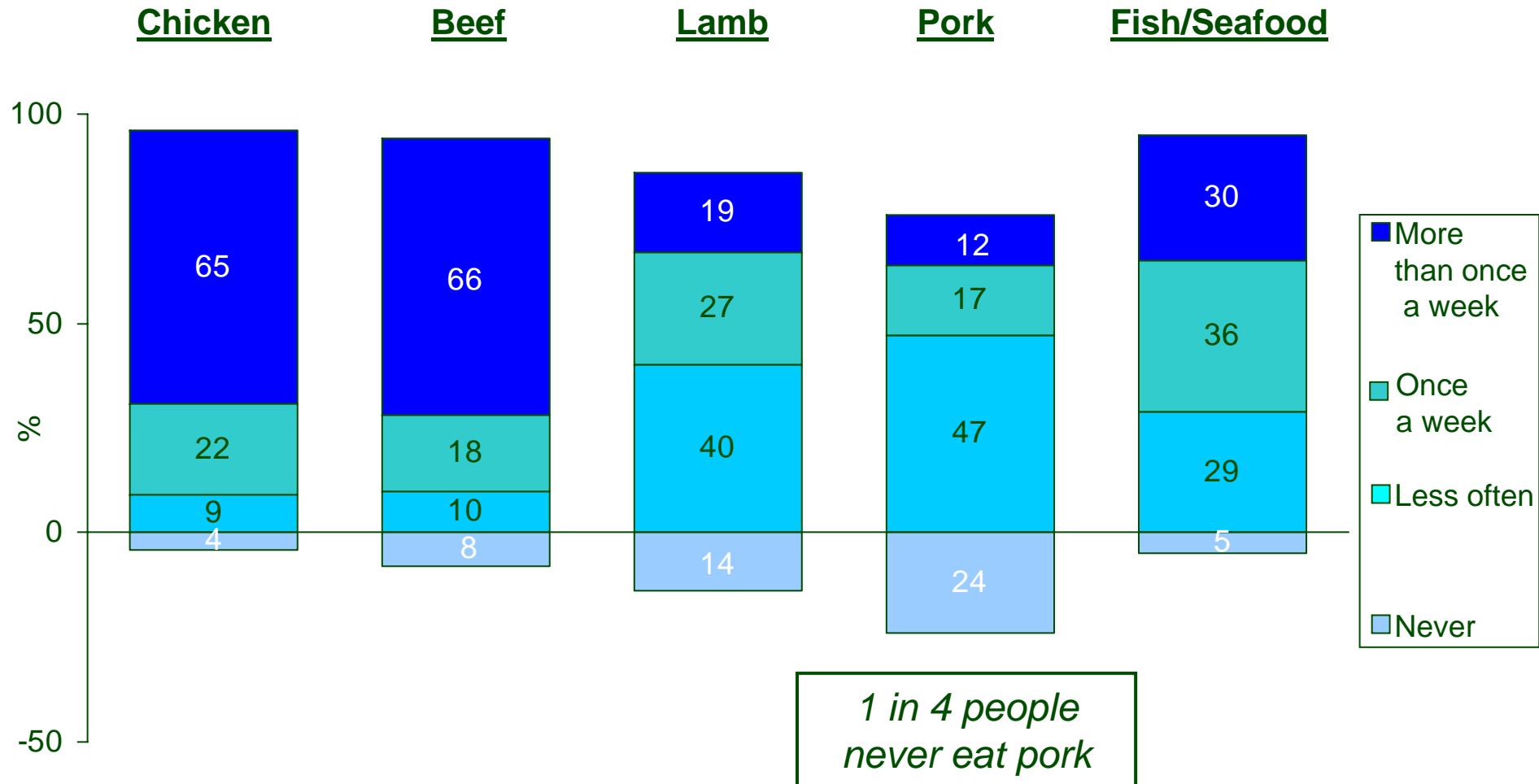
# Frequency is steady, total consumption shows growth, quality improves steadily



- **Chicken and beef remain the most frequent meat staple in the diet**
  - ↳ Beef consumption has increased
- **Growth in beef is limited by preference for chicken**
  - ↳ Price also a key issue – preference for chicken likely to be linked
- **Younger people driving growth in beef consumption**
  - ↳ Least likely to prefer chicken
- **Frequency of purchase of lamb in slight decline**
  - ↳ Overall consumption is steady
- **Over 55 year olds are most reducing their consumption of lamb**
  - ↳ Driven by price sensitivity
- **Red meat consumption frequency is currently less than what is considered a healthy target**
  - ↳ Frequency growth is not hampered by health concerns

# Chicken and beef are core in the meat repertoire

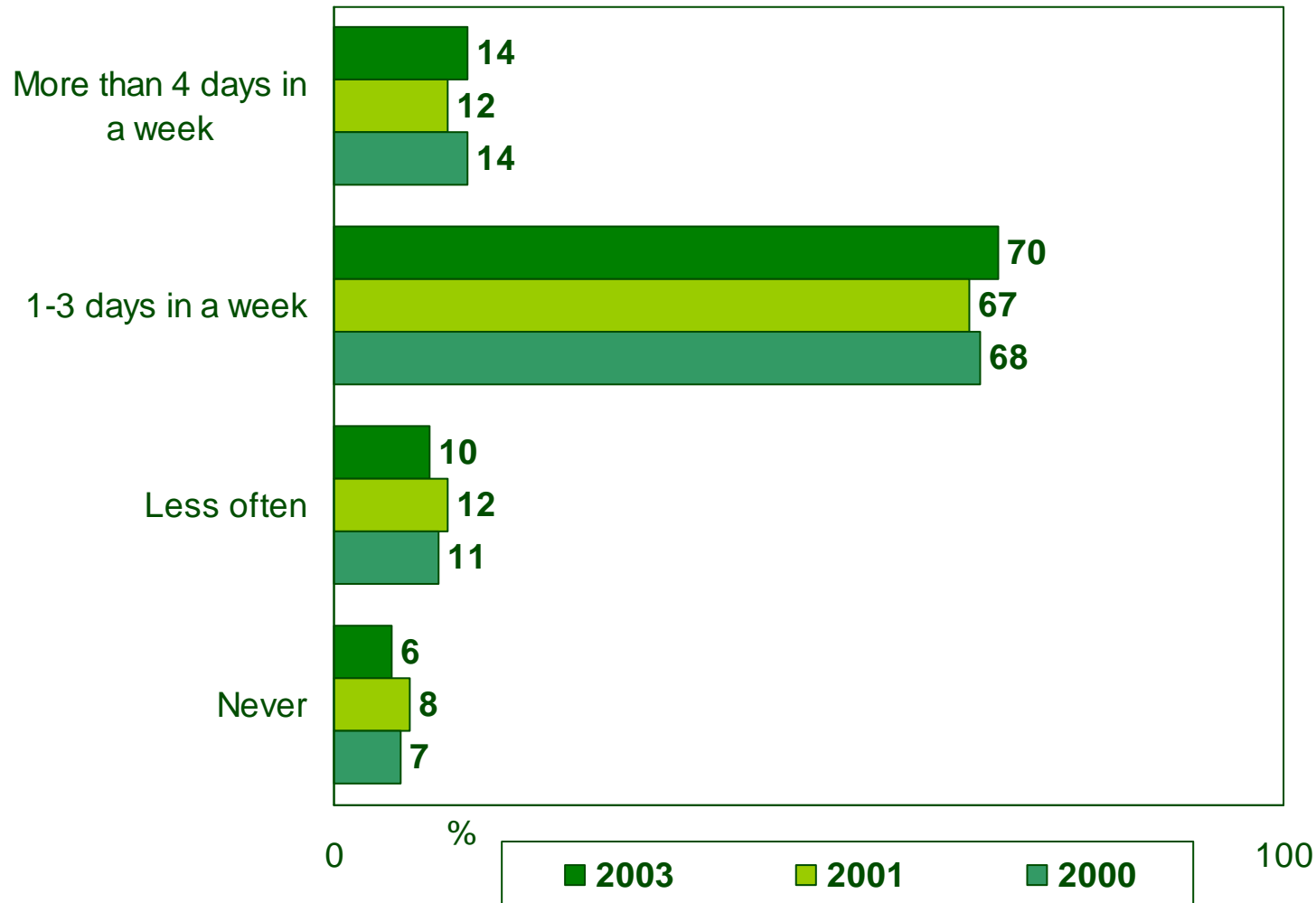
*'How often in an average week would you eat these particular meats at home?'*



Base: All grocery buyers, n=500

## Frequency of beef consumption has remained steady

*'How often in an average week would you eat beef at home?'*



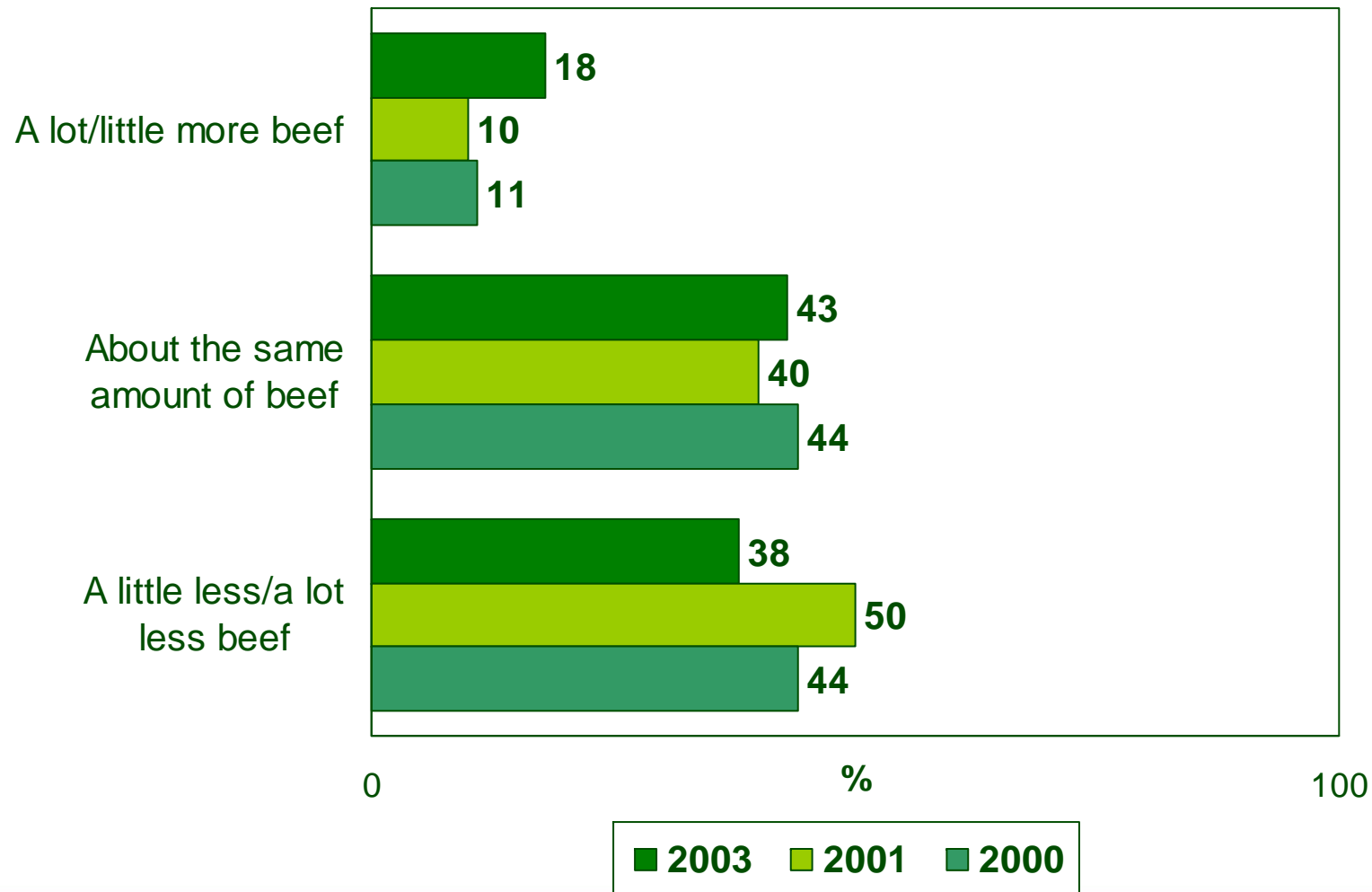
*Base: All respondents: 2003 (n=500), 2001 (n=500), 2000 (n=1001)*



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## Beef consumption is increasing from previous years

*'Compared with a couple of years ago, would you say you eat (.....)?'*



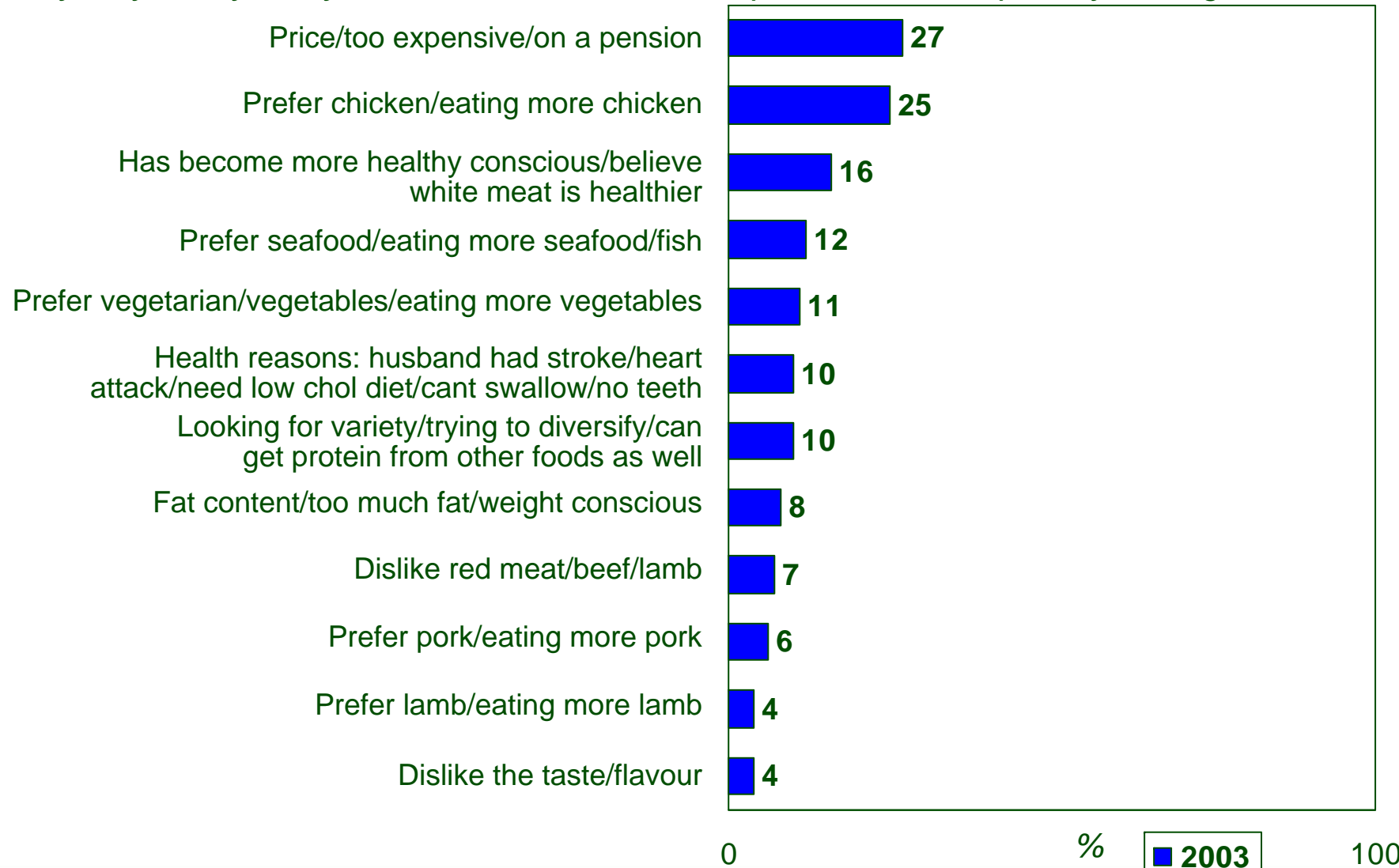
Base: All eating beef: 2003 (n=462), 2001 (n=466), 2000 (n=931)



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# Those who are eating less beef are mostly driven by price or replacing beef with chicken meals

*'Why do you say that you eat **LESS** beef now compared with a couple of years ago? '*



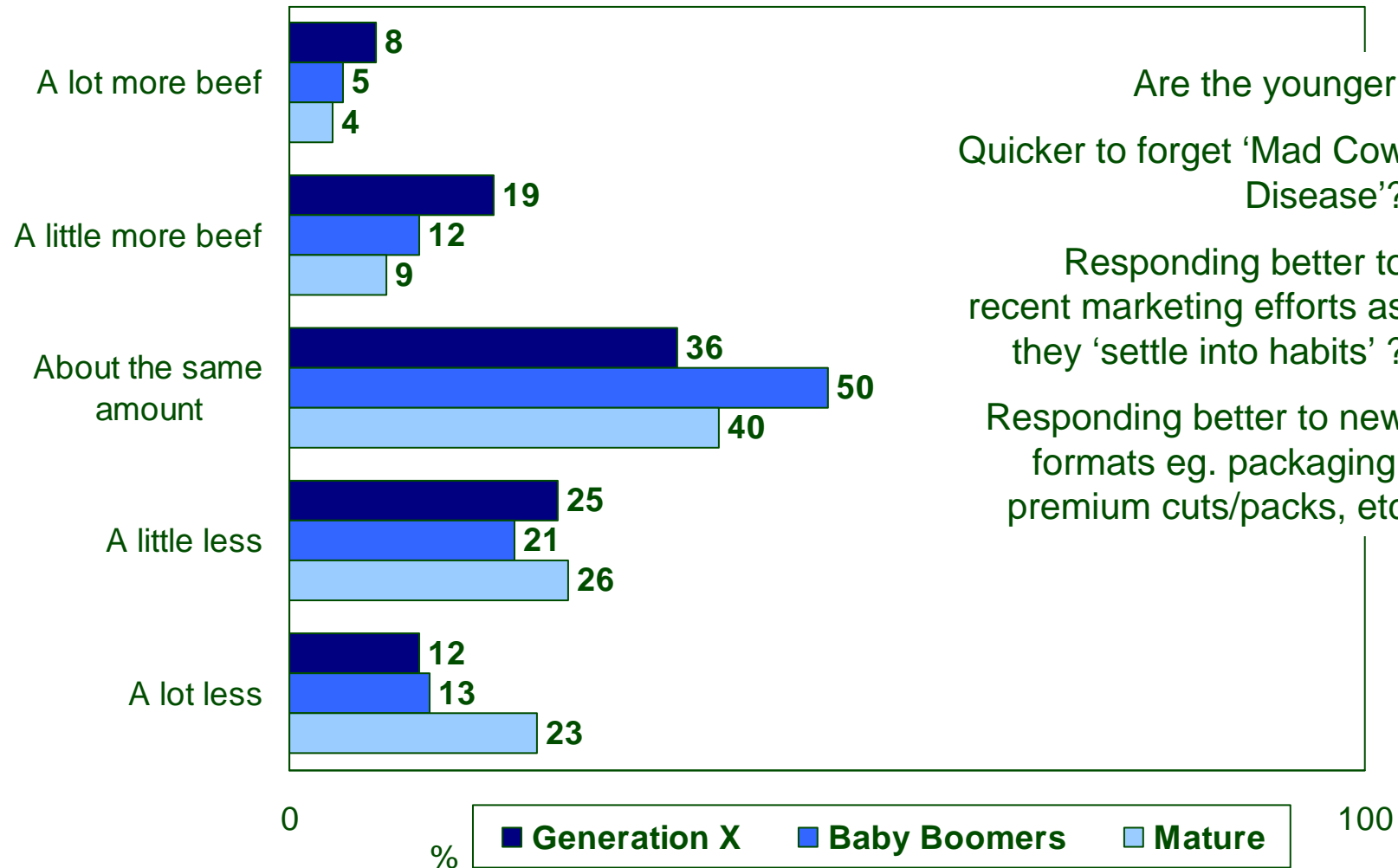
*Base: All eating less beef: 2003 (n=178)*



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# The increase in beef consumption is driven by the young

*'Compared with a couple of years ago, would you say you eat (.....)?'*

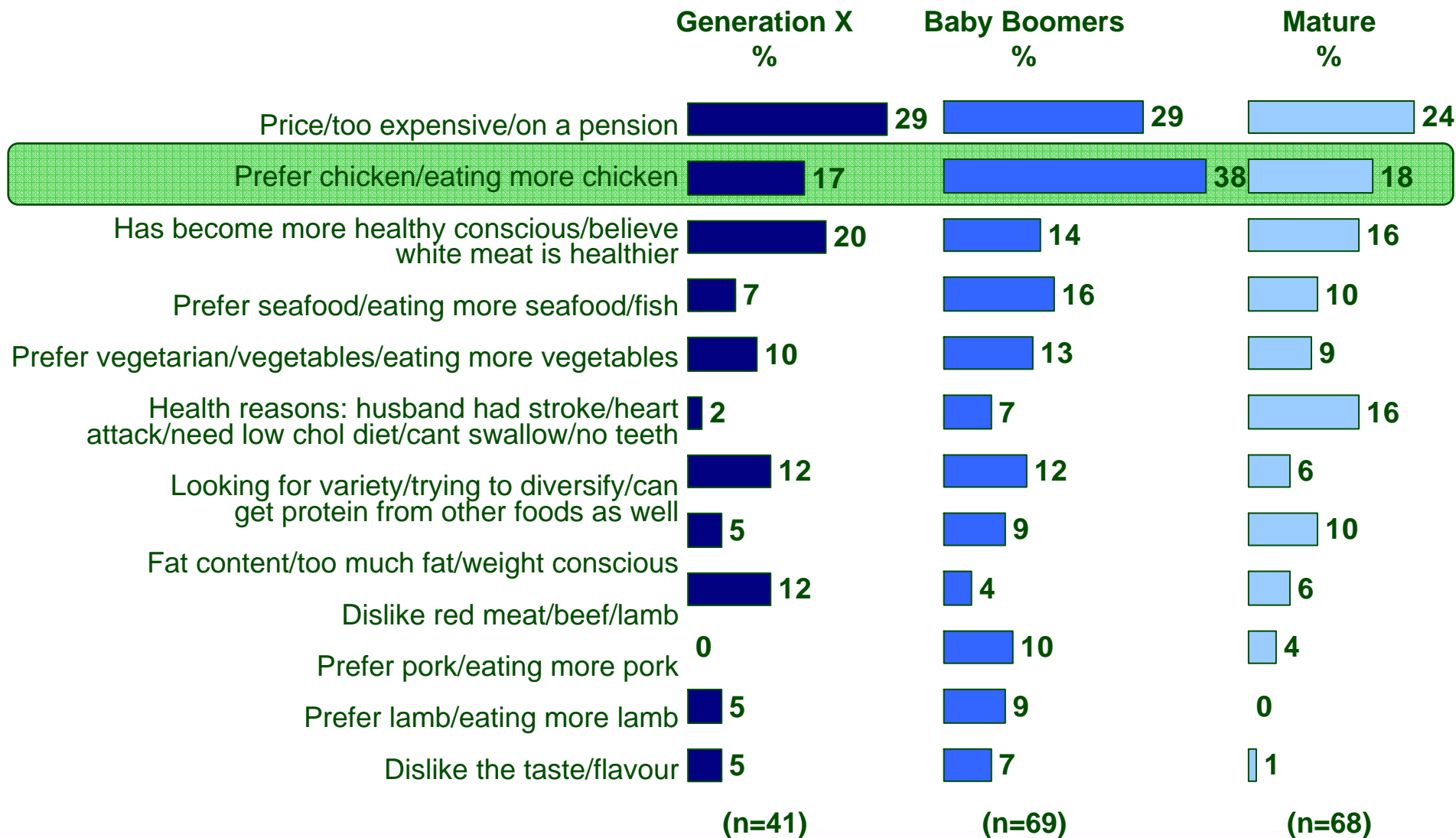


Base: All eating beef: Generation X (n=113), Baby Boomers (n=208), Mature (n=141)

# 35-54 year olds preference for chicken is at expense of beef



'Why do you say that you eat **LESS** beef now compared with a couple of years ago? '

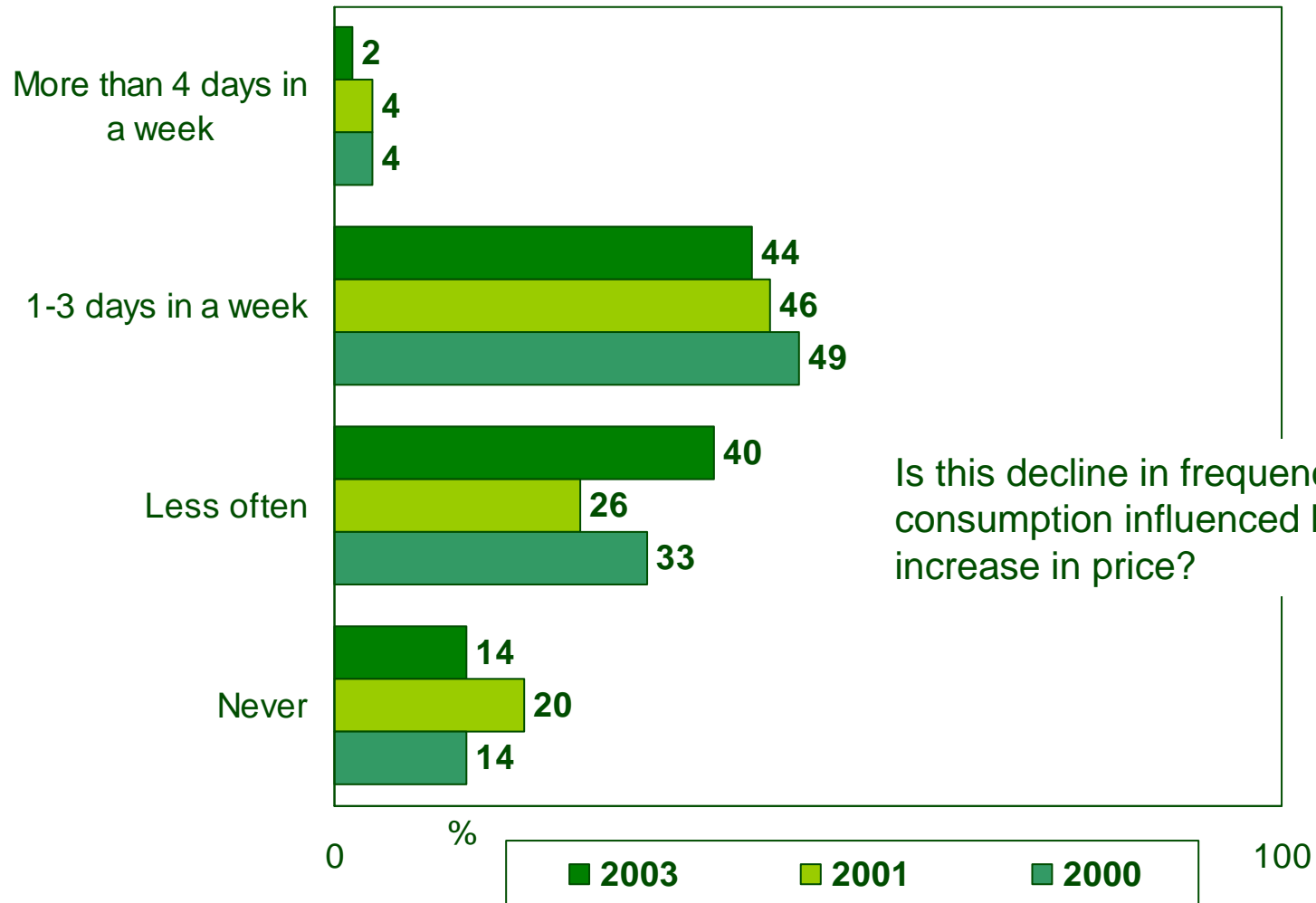


Base: All eating less beef: 2003 (n=178)



# People are eating lamb less frequently than in recent years

*'How often in an average week would you eat lamb at home?'*



Is this decline in frequency of consumption influenced by the increase in price?

Base: All respondents: 2003 (n=500), 2001 (n=500), 2000 (n=1001)

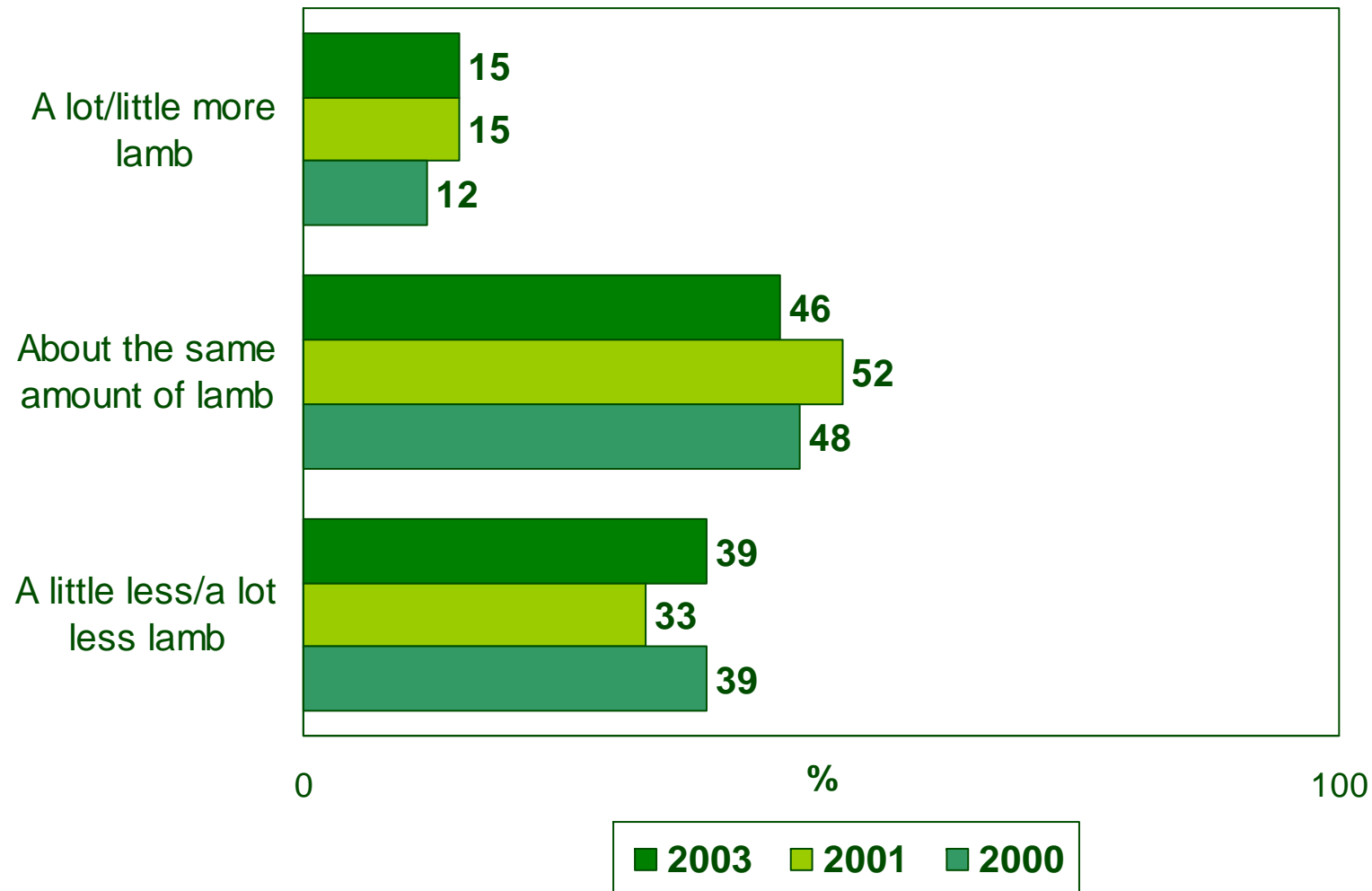


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## Consumption of lamb has remained steady overtime

*'And compared with a couple of years ago, would you say you eat...?'*



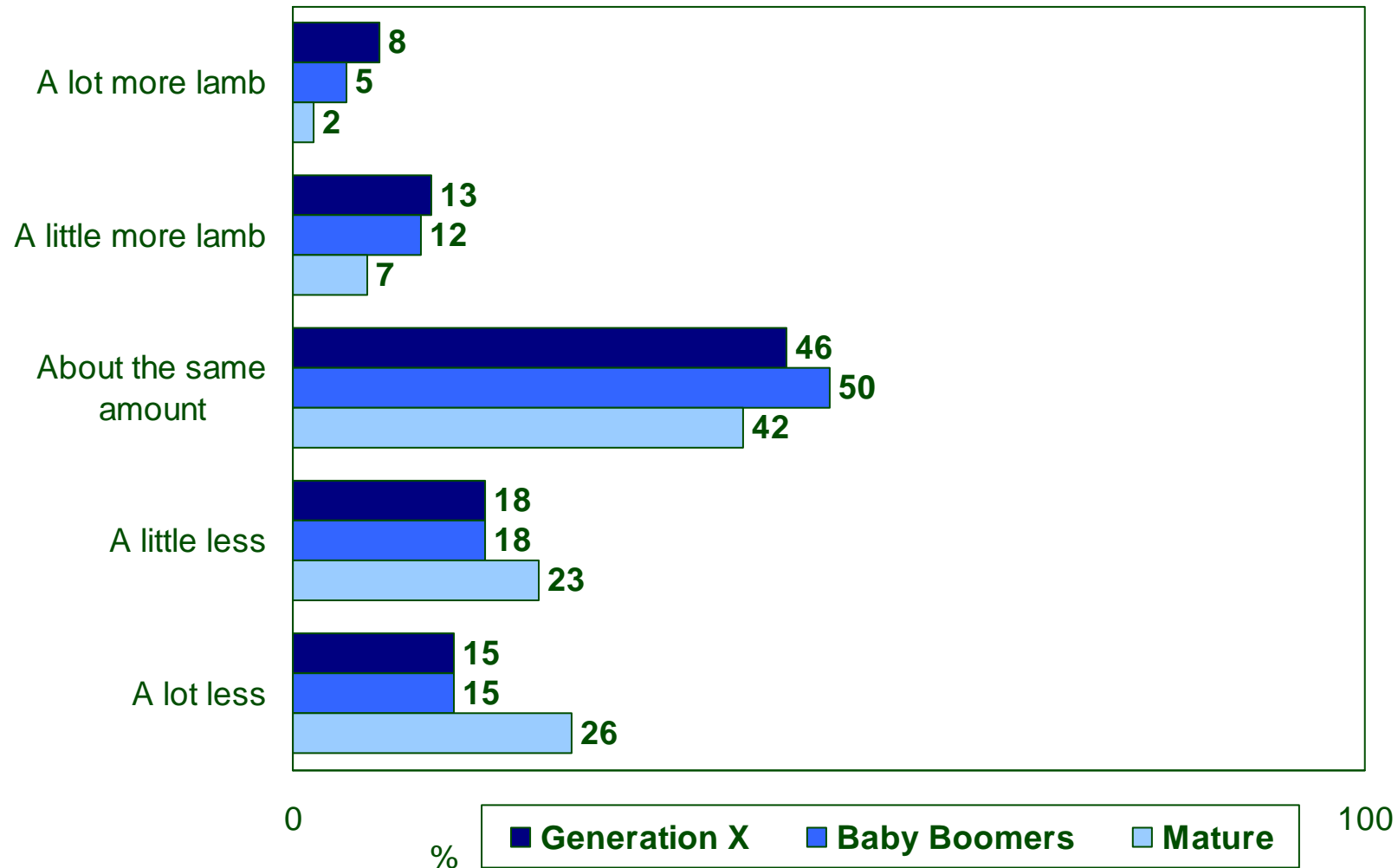
Base: All eating lamb: 2003 (n=428), 2001 (n=404), 2000 (n=861)



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## Over 55s are reducing growth in lamb consumption

*'And compared with a couple of years ago, would you say you eat...?'*



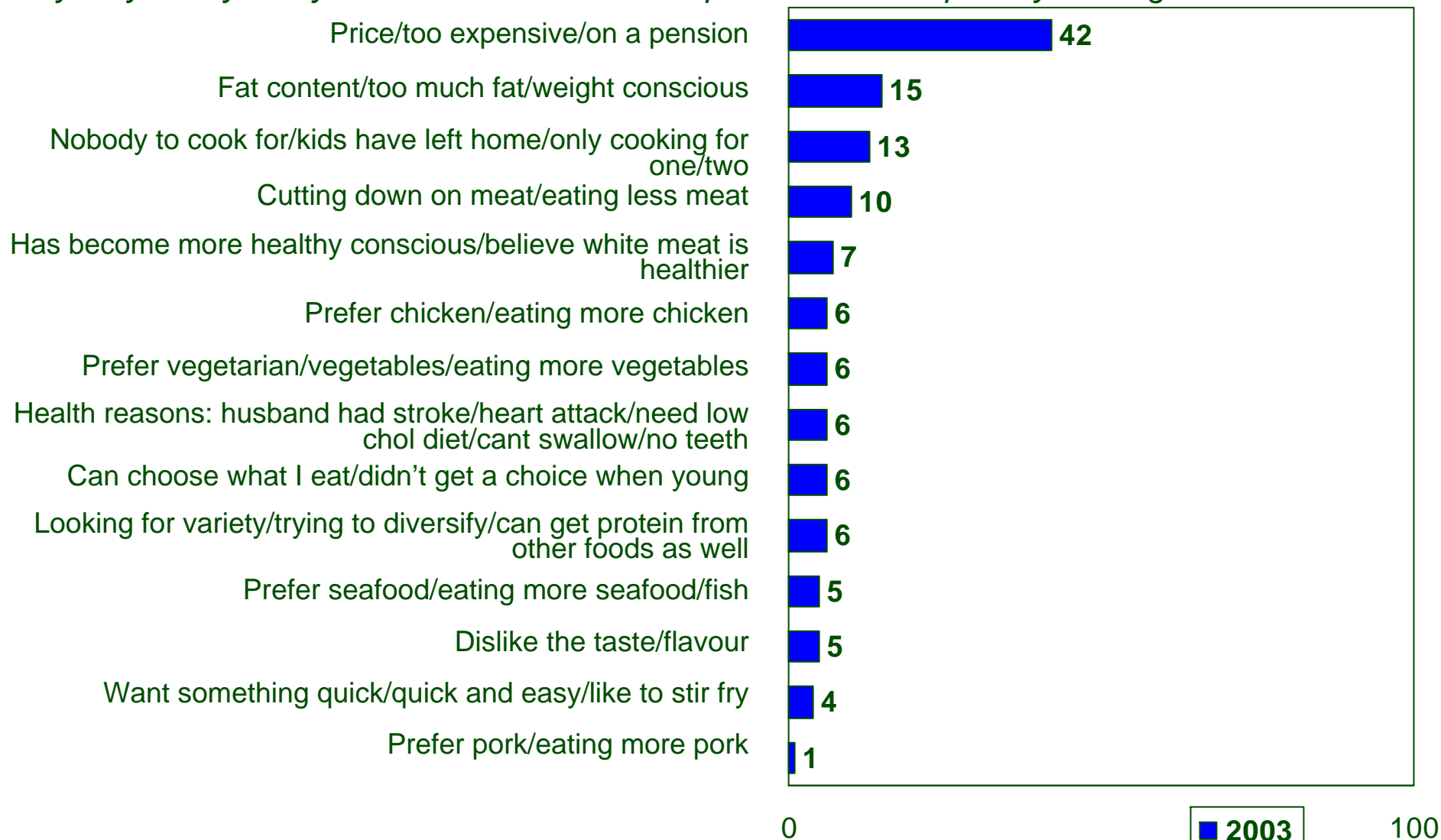
Base: All eating lamb: Generation X (n=101), Baby Boomers (n=195), Mature (n=132)



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# The increase in prices has influenced the decrease in consumption of lamb

Why do you say that you eat less lamb now compared with a couple of years 'ago? '

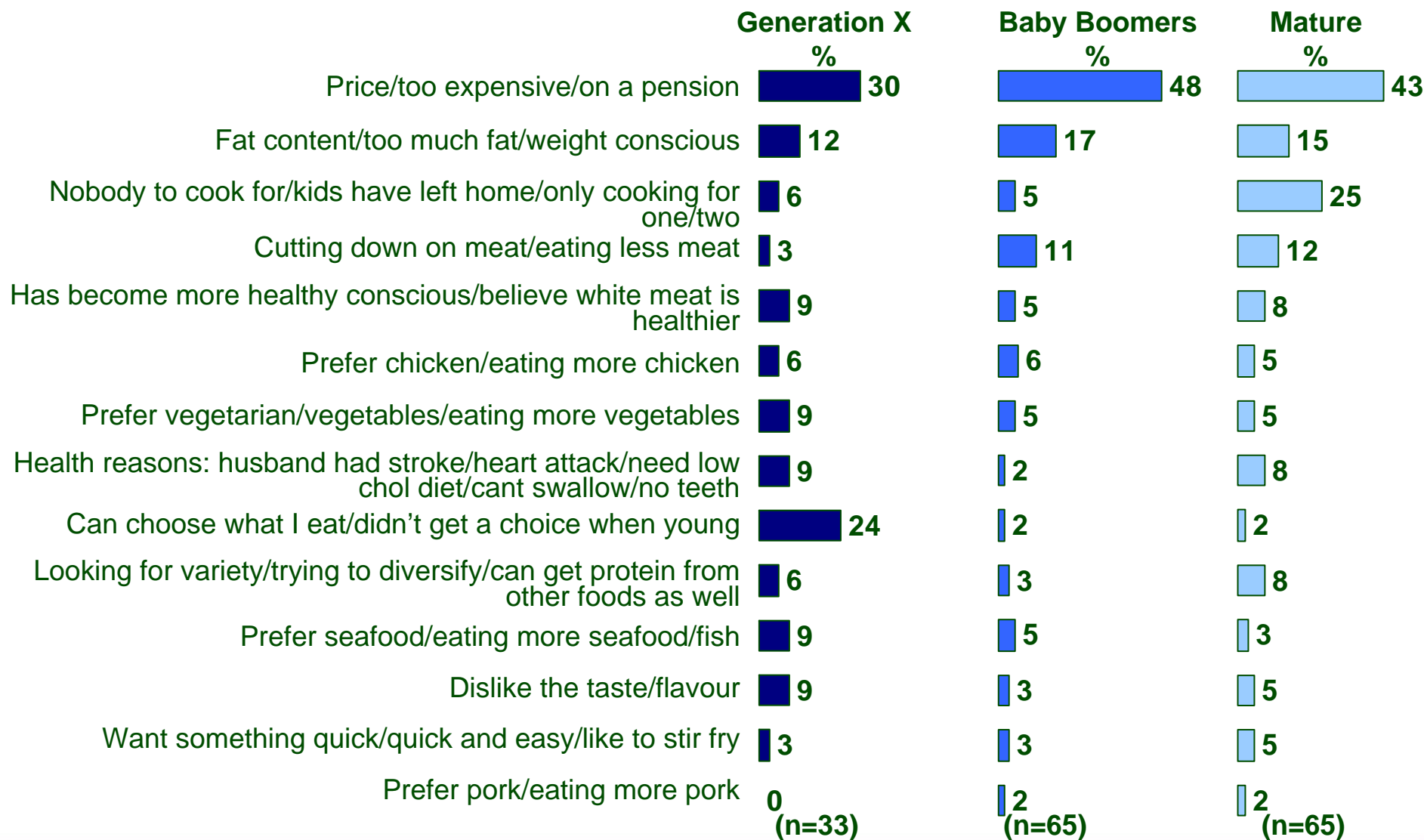


Base: All eating less lamb: 2003 (n=163)

# Price is the biggest reason for eating less lamb across age groups



Why do you say that you eat less lamb now compared with a couple of years 'ago?'

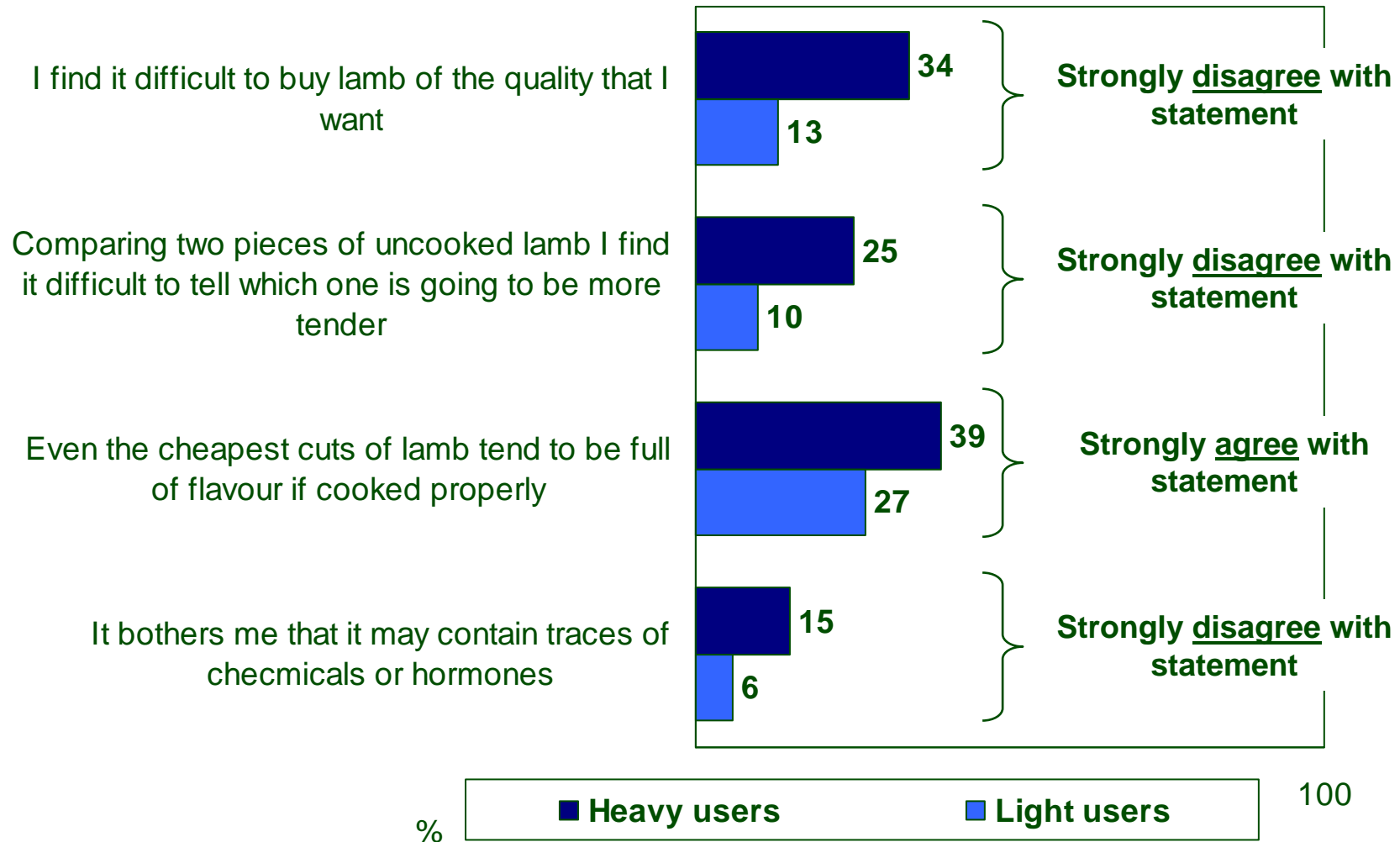


Base: All eating less lamb: 2003 (n=163)



# Frequent users have no difficulty finding lamb of the quality they want

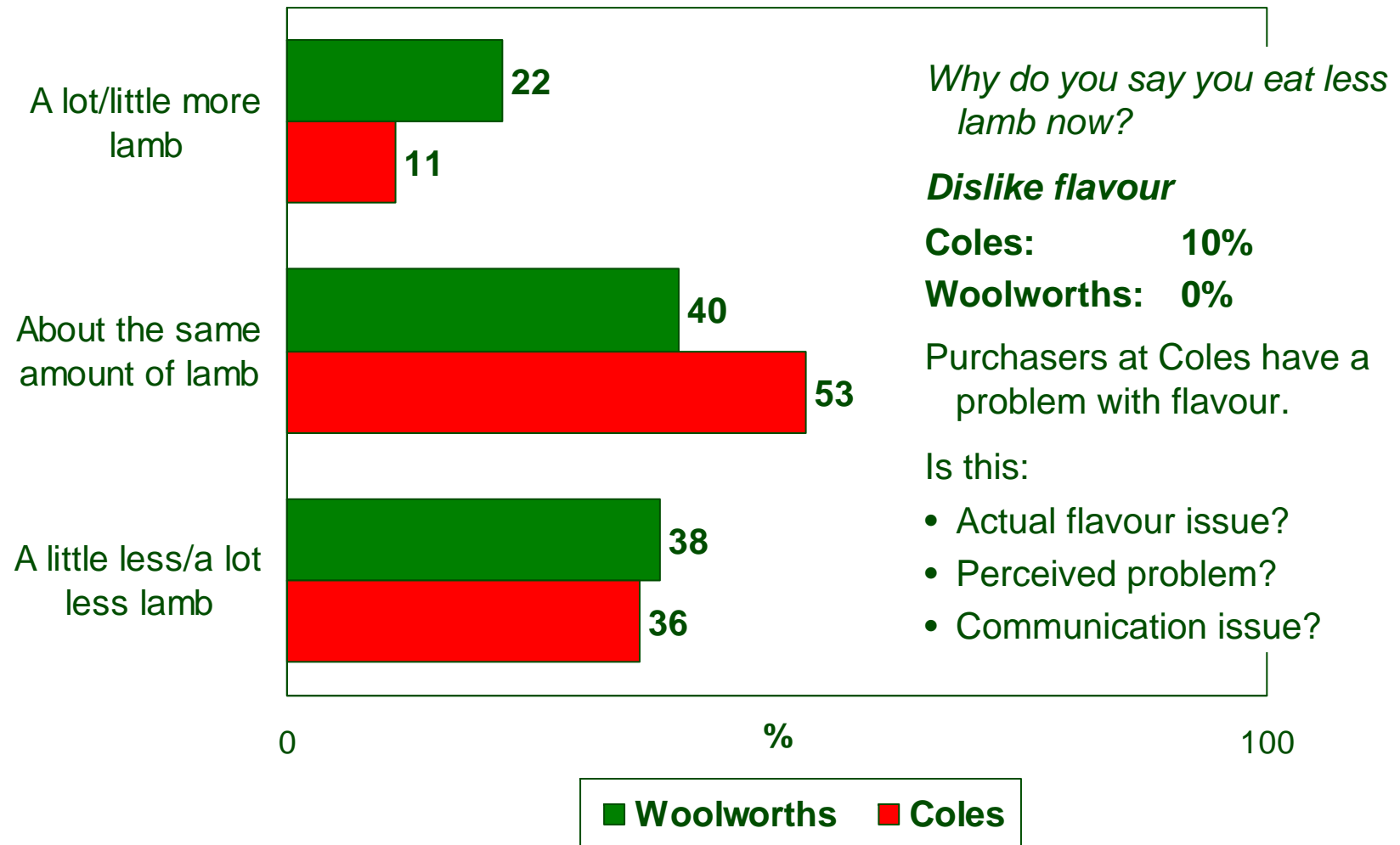
Could you tell me how much you agree with the following statements about lamb.



Base: All eating lamb: Heavy users (2+ serves of lamb a week n=92); Light users (<1 serve of lamb/week n=190)

## Woolworths has generated an increase in lamb consumption that Coles has not

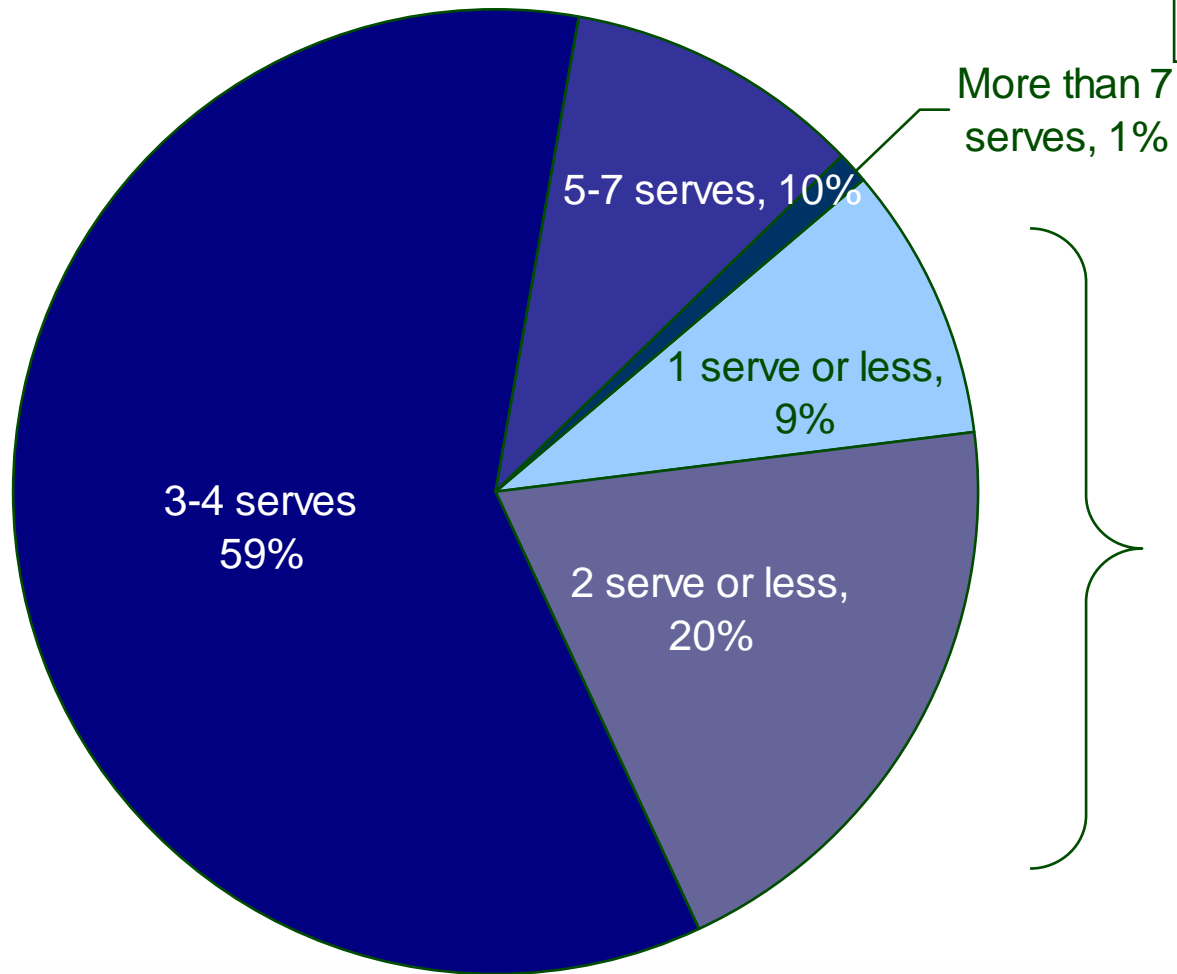
*'And compared with a couple of years ago, would you say you eat...?'*



Base: All eating lamb: 2003 (n=428), 2001 (n=404), 2000 (n=861)

# Many feel a red meat meal every second day is a healthy target

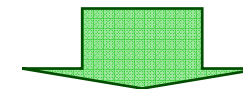
*In your opinion, how many red meat meals (beef or lamb) per week is a healthy target for your family?*



*There are no differences in opinion by age groups*

29% think less than 3 serves a week is a healthy target

...but 44% currently eat less than 3 serves a week

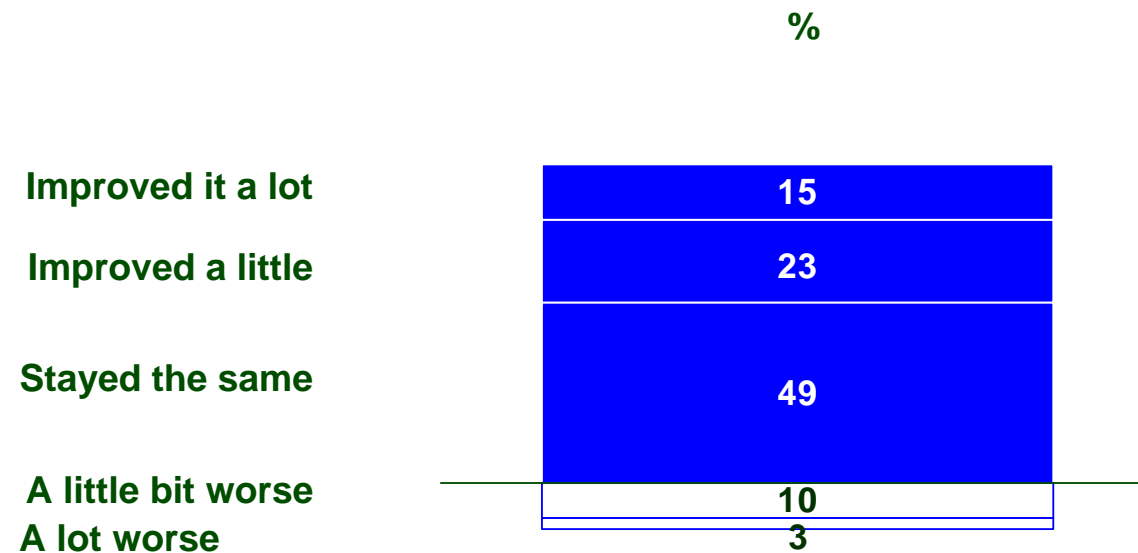


**Health should not be a barrier to increasing weight of consumption**

Base: All eating beef or lamb: 2003 (n=492)

## Beef quality is seen to be improving

*How would you say the quality of beef has changed in the last 3 years?*

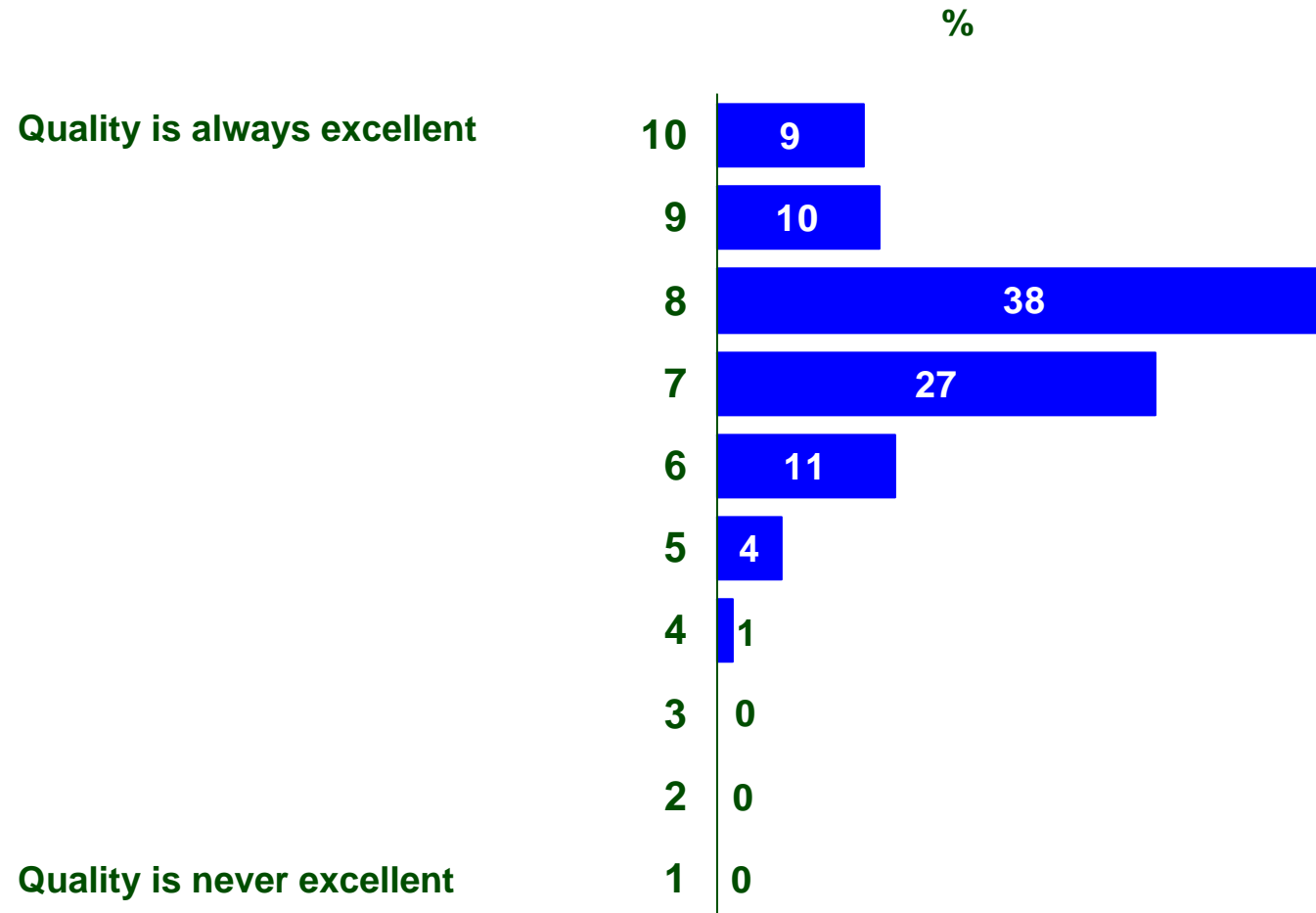


Base: People that eat beef at home (n=462)



## Generally there is a high perception of beef quality

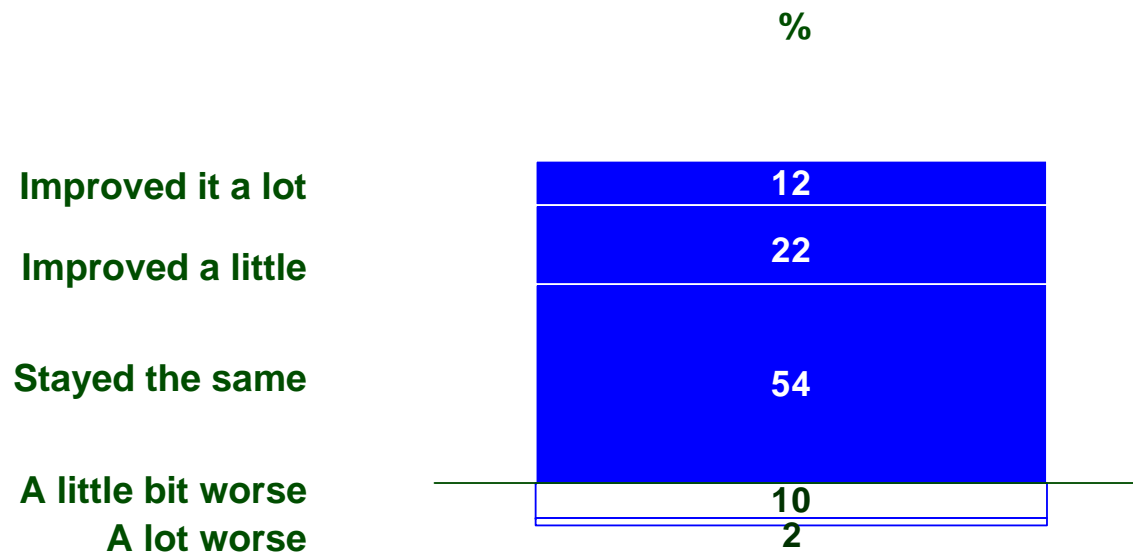
Overall how would you rate the quality of beef you buy nowadays?



Base: People that buy beef to cook at home (n=467)

## Lamb quality is similar to that of beef

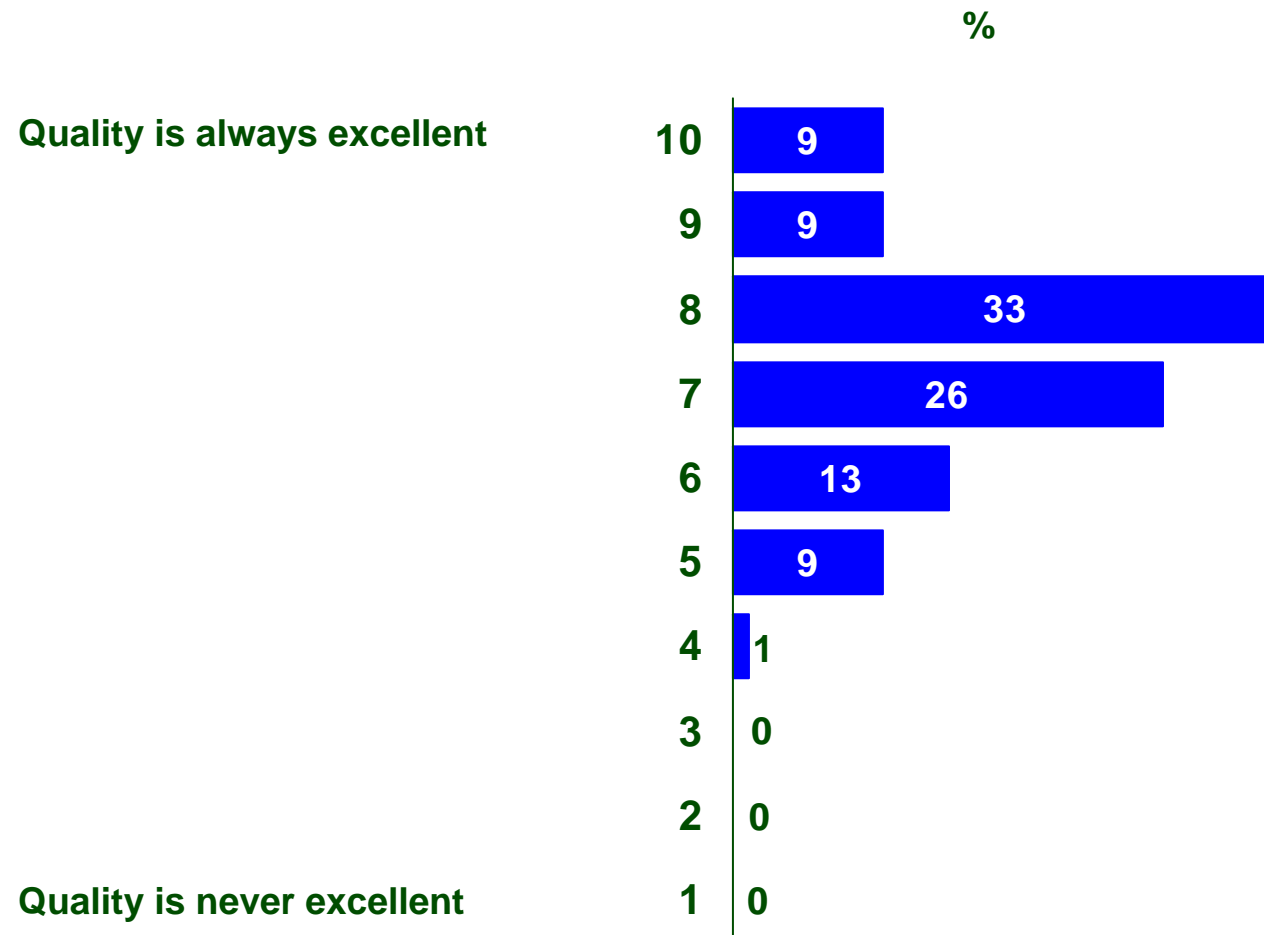
*How would you say the quality of lamb has changed in the last 3 years?*



Base: People that eat lamb at home (n=428)

## Lamb quality is similar to that of beef

Overall how would you rate the quality of lamb you buy nowadays?



Base: People that buy lamb to cook at home (n=424)

# Cooking Methods & Styles



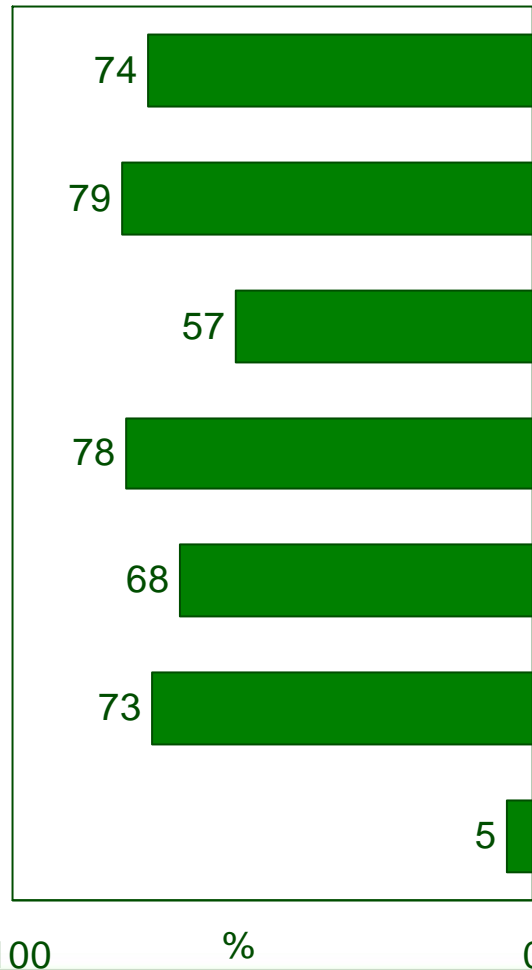
## Wide variety of cooking methods in use

- The wide variety of cooking methods are used on a weekly basis
- Younger MGBs prefer the quick and easy methods
- There is widely held confidence that beef will turn out well with all cooking methods
- Chinese and Italian are the most commonly used styles
  - ↳ Styles are used at least once a month – or are unlikely to be used much at all
- Beef is used across most styles
  - ↳ Lamb only commonly used in Greek cooking

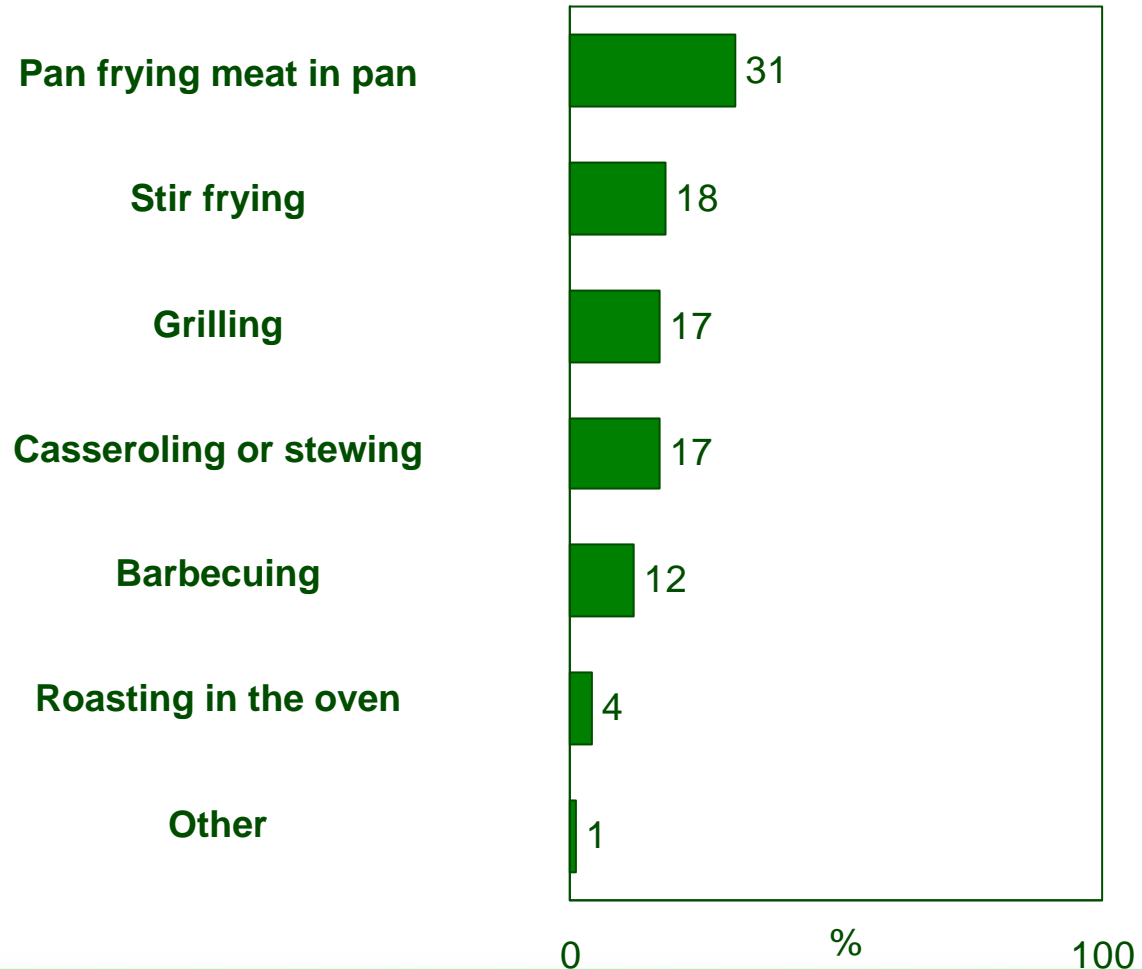
## People use a wide variety of methods to cook beef

And, on average how often would you use (TYPE OF COOKING FOR BEEF) when cooking beef?

Methods for cooking beef you use



Method for cooking beef you use most often



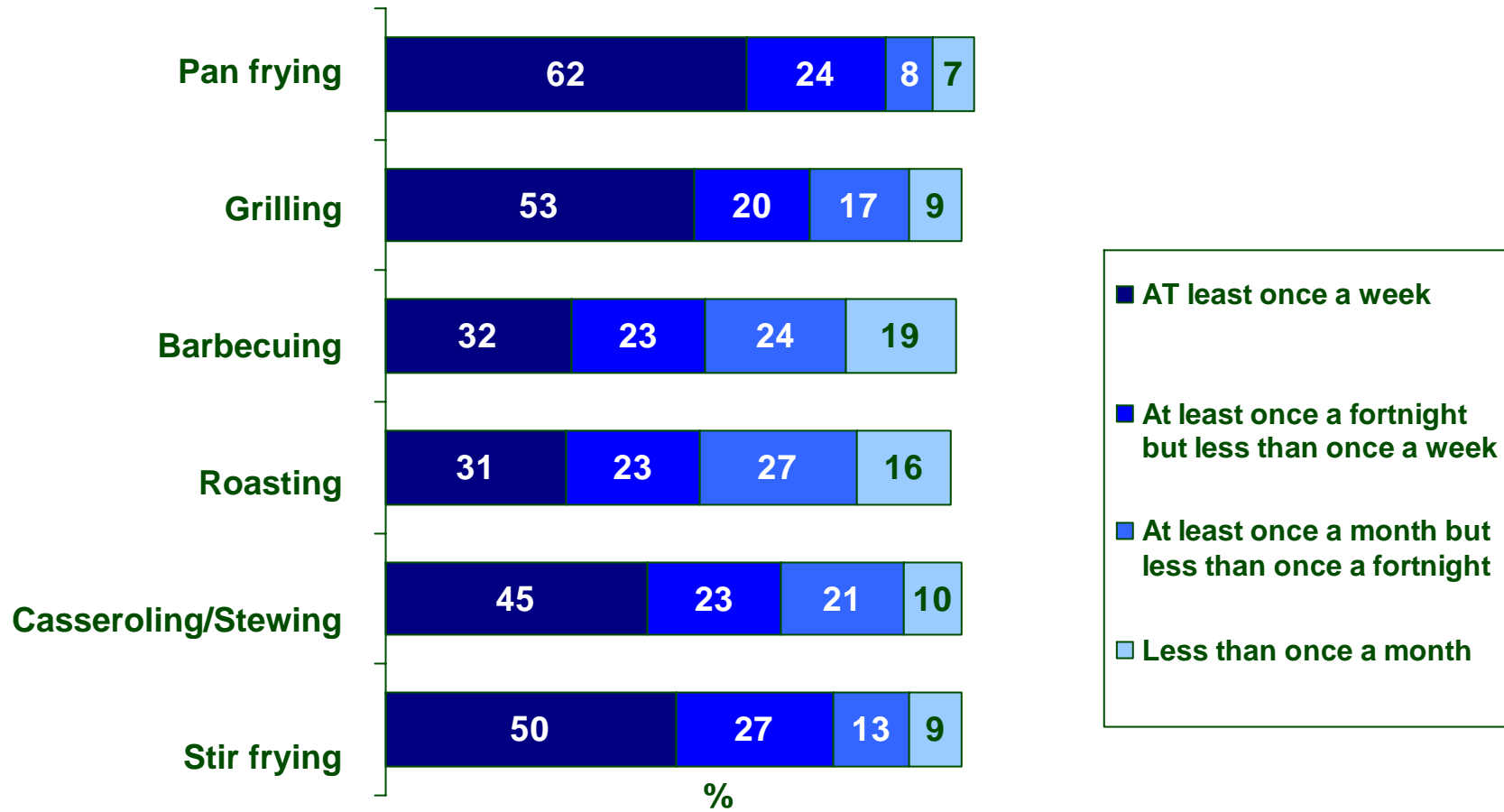
Base: All buying beef: 2003 (n=467)



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# Most people use a variety of methods to cook beef once a week

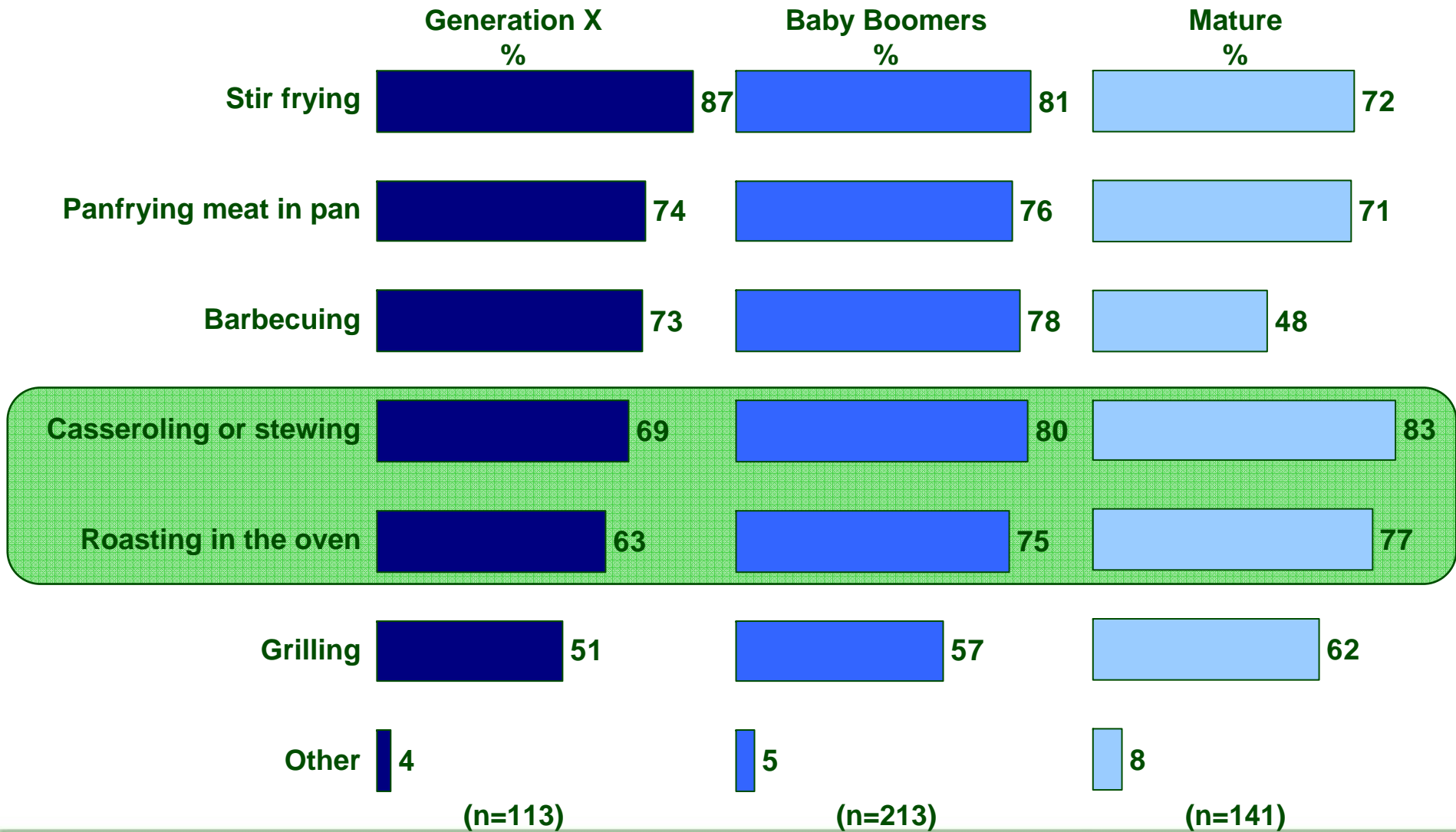
Thinking now about cooking beef, which of these cooking methods do you use when cooking beef?



Base: All buying beef: 2003 (n=467)

# Younger MGBs tend to use less roasting and casseroles

Thinking now about cooking beef, which of these cooking methods do you use when cooking beef?

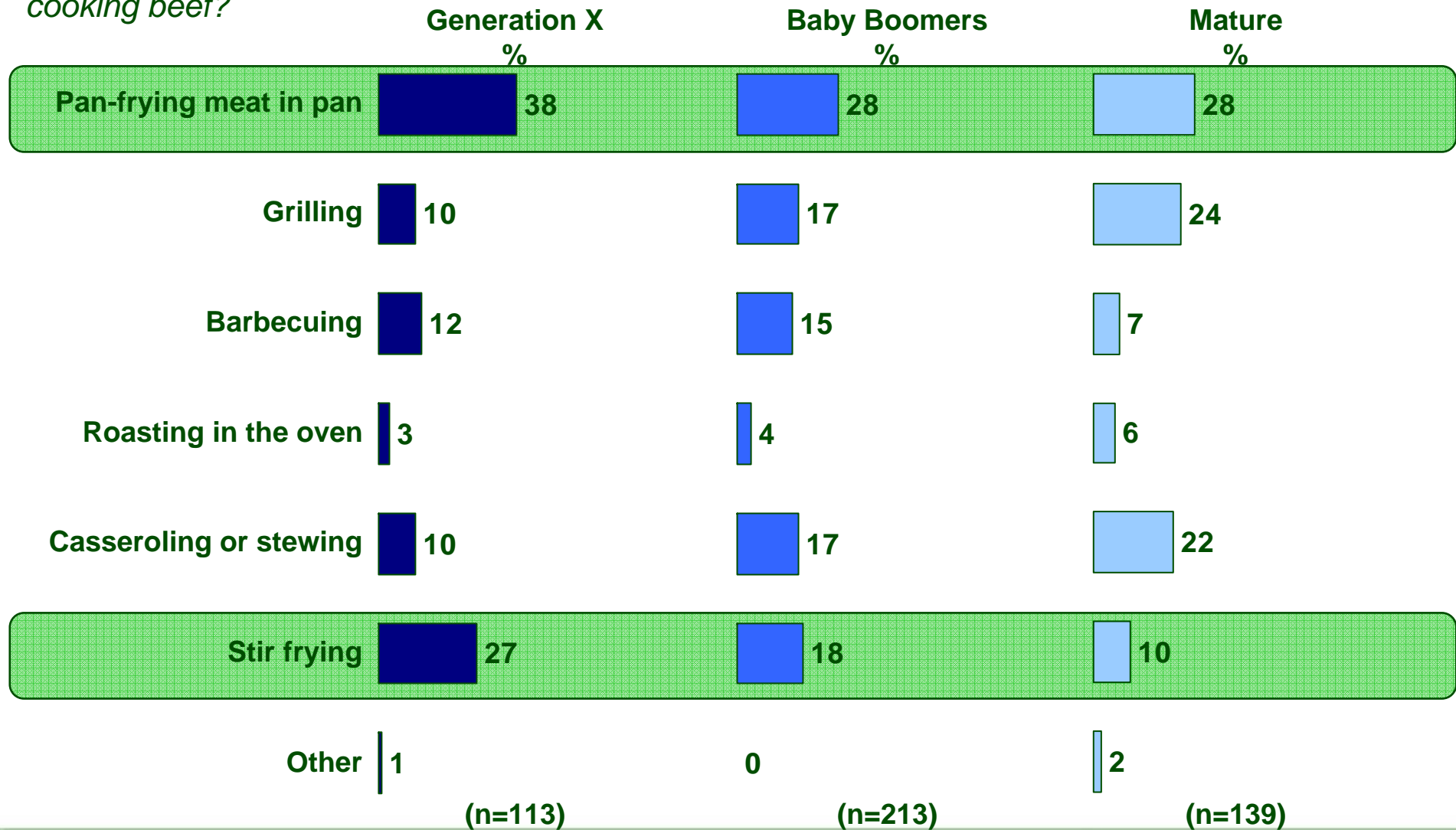


Base: All buying beef: 2003 (n=467)



## Younger MGBs favour the quick and easy methods

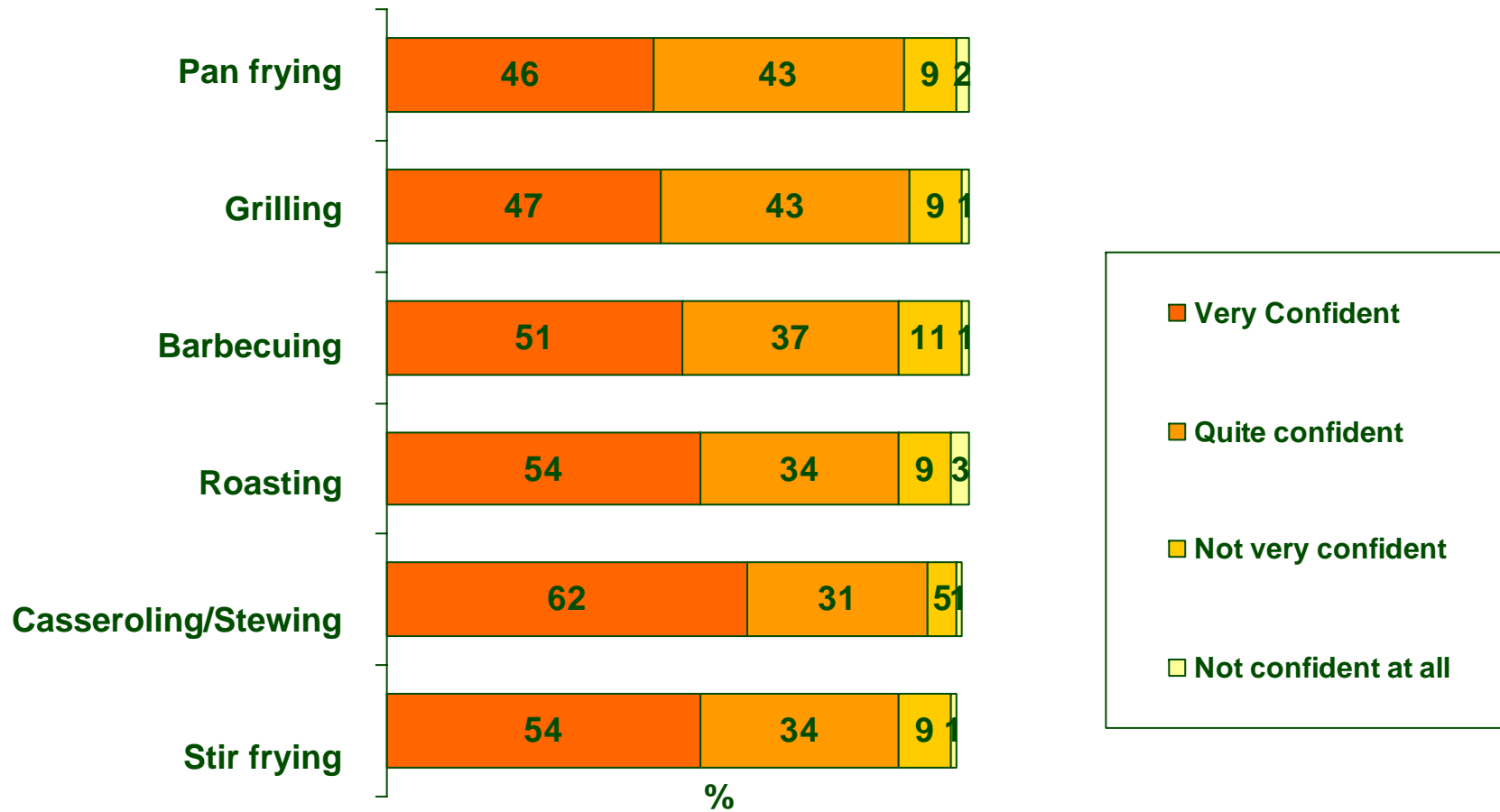
Thinking now about cooking beef, which of these cooking methods do you use most often when cooking beef?



Base: All buying beef: 2003 (n=467)

# Most people are confident their beef will turn out the way they want

When you cook beef by [method] how confident are you that it will turn out the way you want it ?

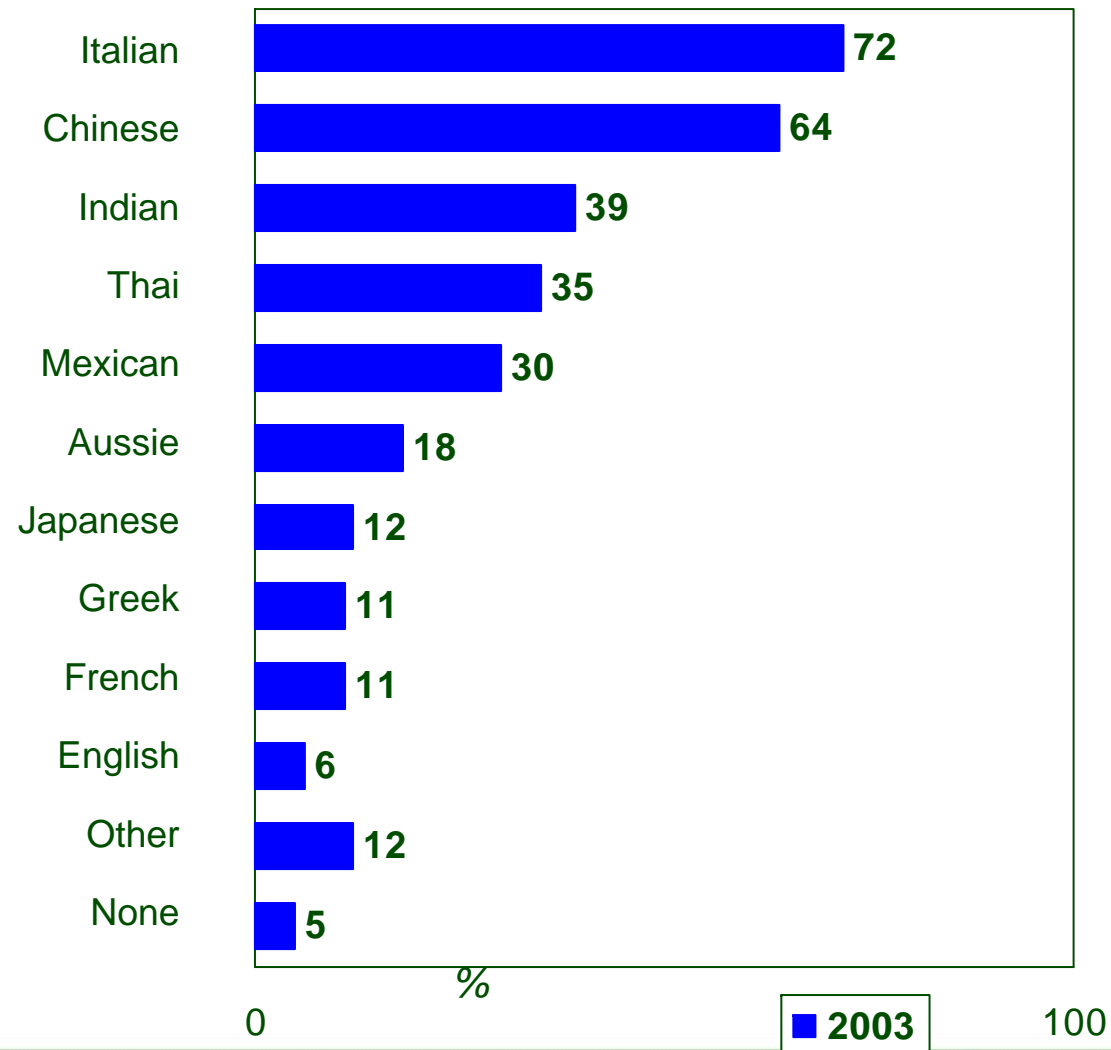


Base: All buying red meat 2003 (n=477)

# Most people use an Italian and Chinese cooking style at least once a month



*Which of the following cooking styles do you use when cooking at home, at least once a month?*

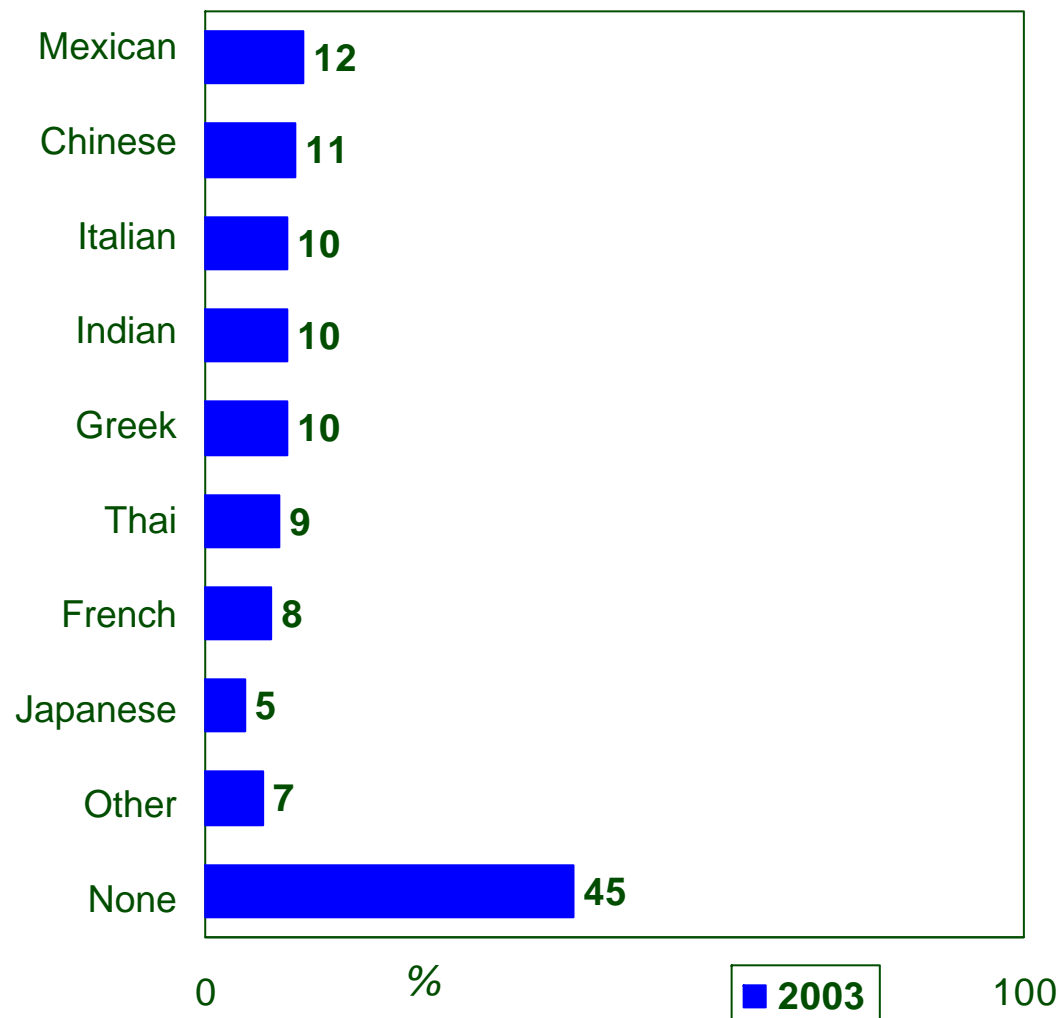


*Base: All respondents: 2003 (n=500)*



## Cooking styles repertoire lasts a month, only few people use a style occasionally if they don't use it every month

*For the remaining styles of cooking, tell me which ones you use at least once every 3 months?*



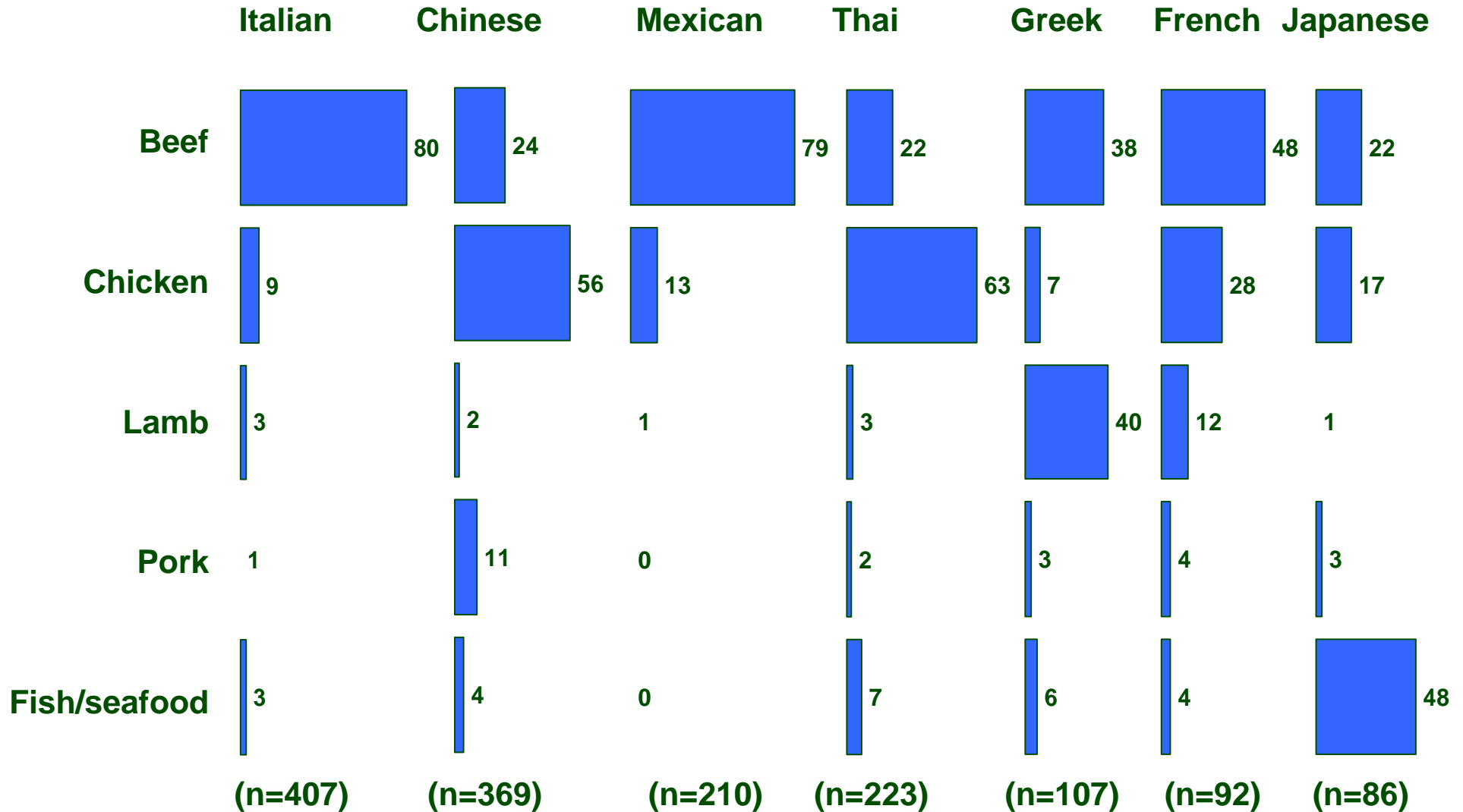
*Base: All respondents: 2003 (n=500)*



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# Beef is used in many styles, lamb predominantly in Greek

For each style of cooking you use, tell me what meats you **most often** use?



Base: All respondents: 2003 (n=500)

# Fat trimming

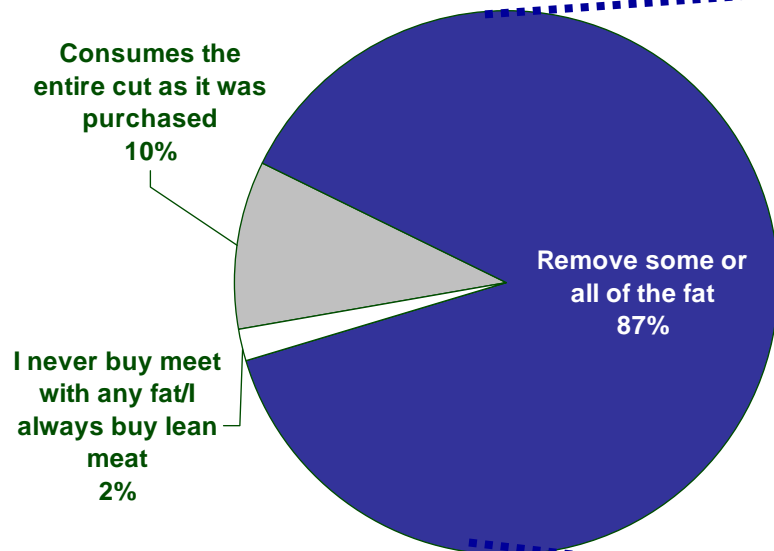


## Fat trimming is widespread

- Amongst those who trim fat almost all remove fat from the edge
- Almost half remove fat from the middle as well
- Those who do remove fat remove most

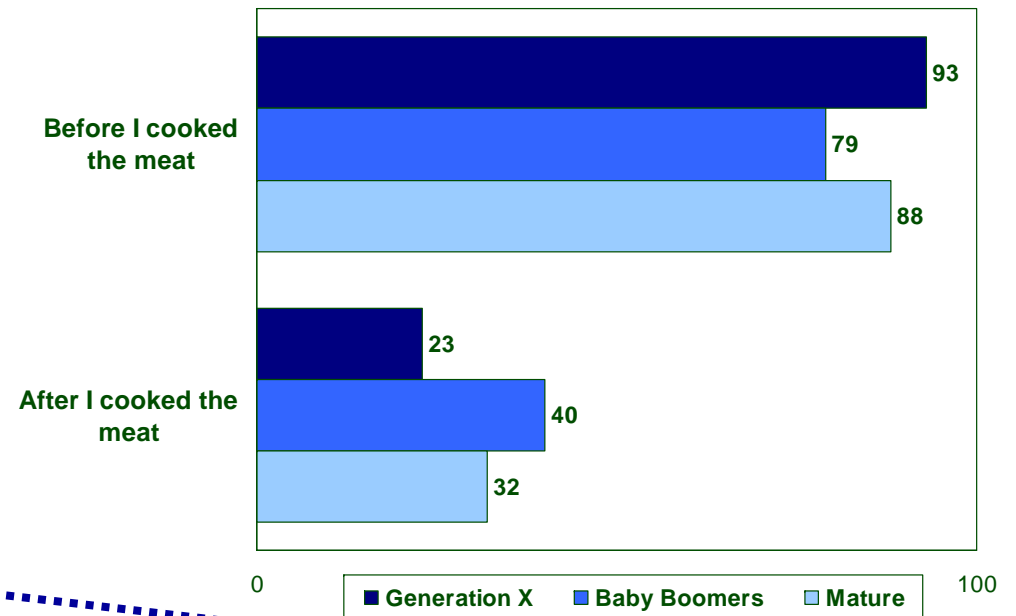
# Most people remove the fat from the meat before cooking it

*When a cut of meat includes fat do you remove any of the fat while preparing, cooking or eating the meat or do you consume the entire cut as it was purchased?*



(n=492)

*Typically, do you remove the fat before or after you have cooked the meat?*

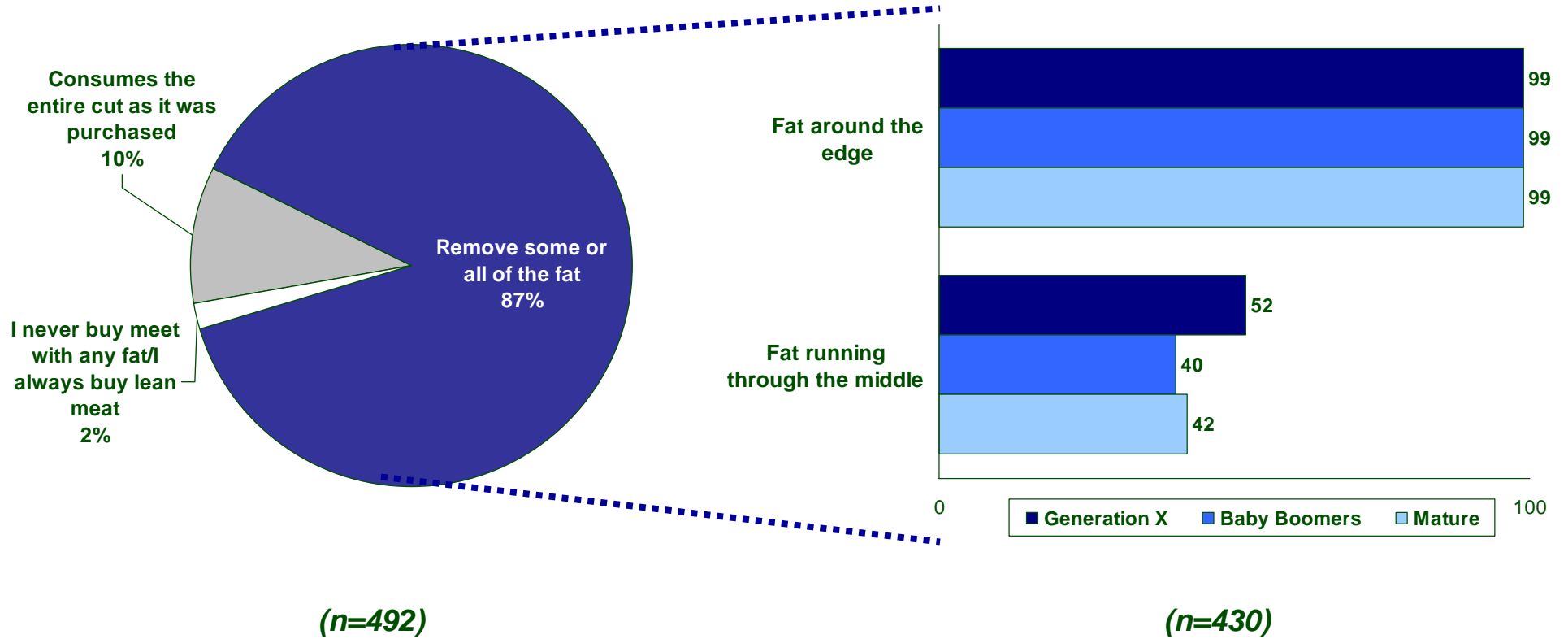


(n=430)



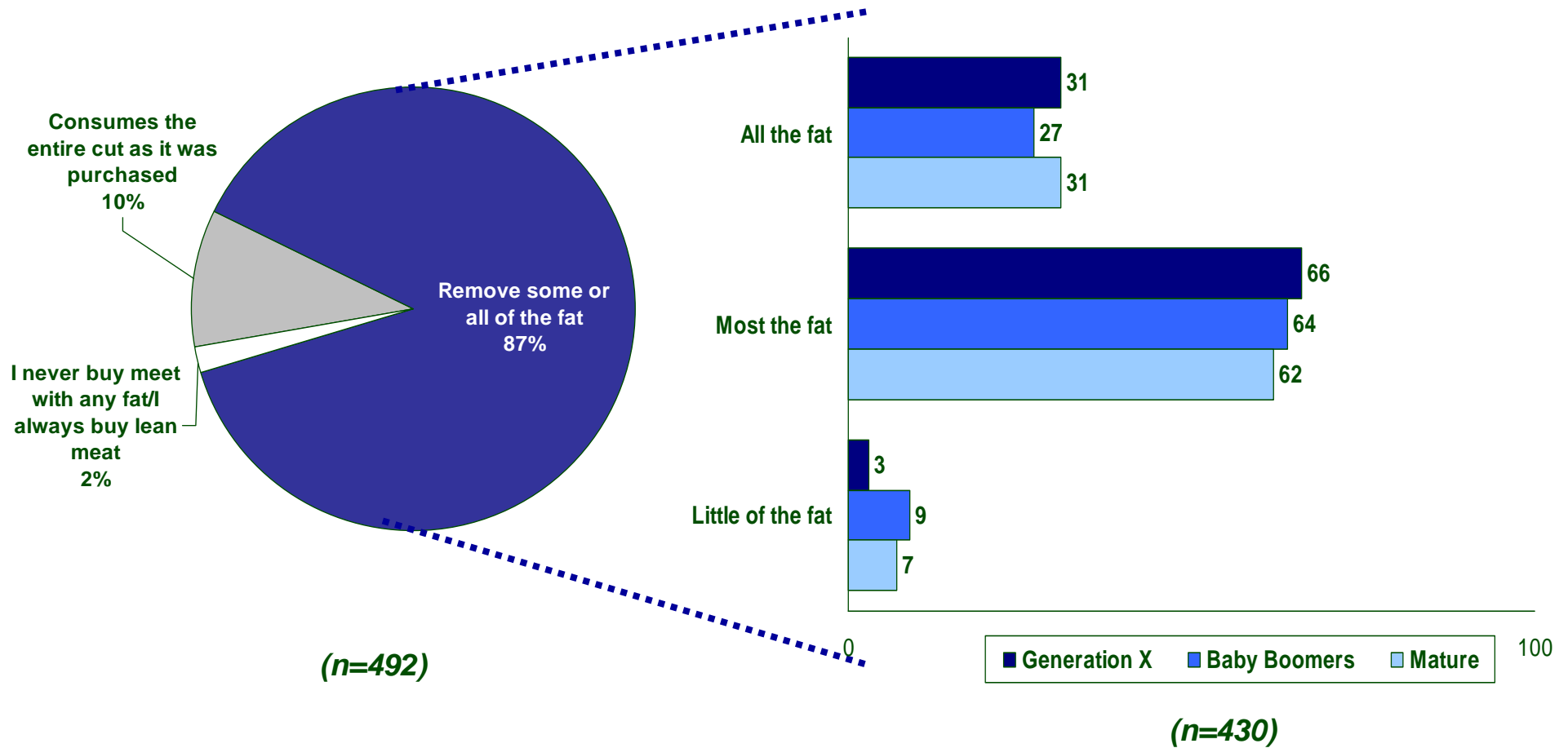
# Half of the people remove the fat running through the middle as well as around the edges

Thinking about the fat you remove do you remove the...



# Those who remove fat remove most or all of it

Typically, when you are removing the fat do you remove...



# Summary & Conclusions



# Red meat industry is in a healthy position in Australia



## ■ Most measures supporting the 5 Pillars of Meat Demand are strong

- ↪ Faith in latest health issues (hormones, etc.) is becoming more important
- ↪ Education in the convenience of red meat will be beneficial

## ■ Red meat purchasing & consumption levels are overall steady

- ↪ Consumers are becoming more fussy in their selection
- ↪ Price and health are key concerns
- ↪ Health need not be a barrier to higher frequency

## ■ Some evidence that concerns raised by BSE / Foot & Mouth / livestock industry fears are now in decline

# Beef is a highly versatile meat

- **Beef is commonly used in many cooking styles and cooking methods**
- **Lamb is less adaptable**
  - ↪ **Mainly useful for Greek cooking**
- **There is strong confidence that red meat will turn out as wanted using most cooking styles**
- **Fat trimming is commonplace**
  - ↪ **Usually carried out thoroughly**
    - **And prior to cooking**

# Consumer education is a tactic with potential – especially for lamb



- Light users of red meat do not know the tips and tricks that heavy users know
  - ↪ How to select the best cut
  - ↪ How to be confident that it will turn out as wanted
  - ↪ How convenient red meat can be
  
- Educate more about the *variety* of uses lamb can be put to
  
- Demonstrate the disparity between levels of consumption and healthy expectations
  
- The hypothesis that red meat is healthier than expected due to fat trimming is well validated



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A U S T R A L I A

## **Meat Expectations 2003**

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