

# Choosing Kangaroo Project: Product and industry attributes and consumer choice behaviour

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RIRDC funded project  
*New animal products program*

# What did we want to find out?

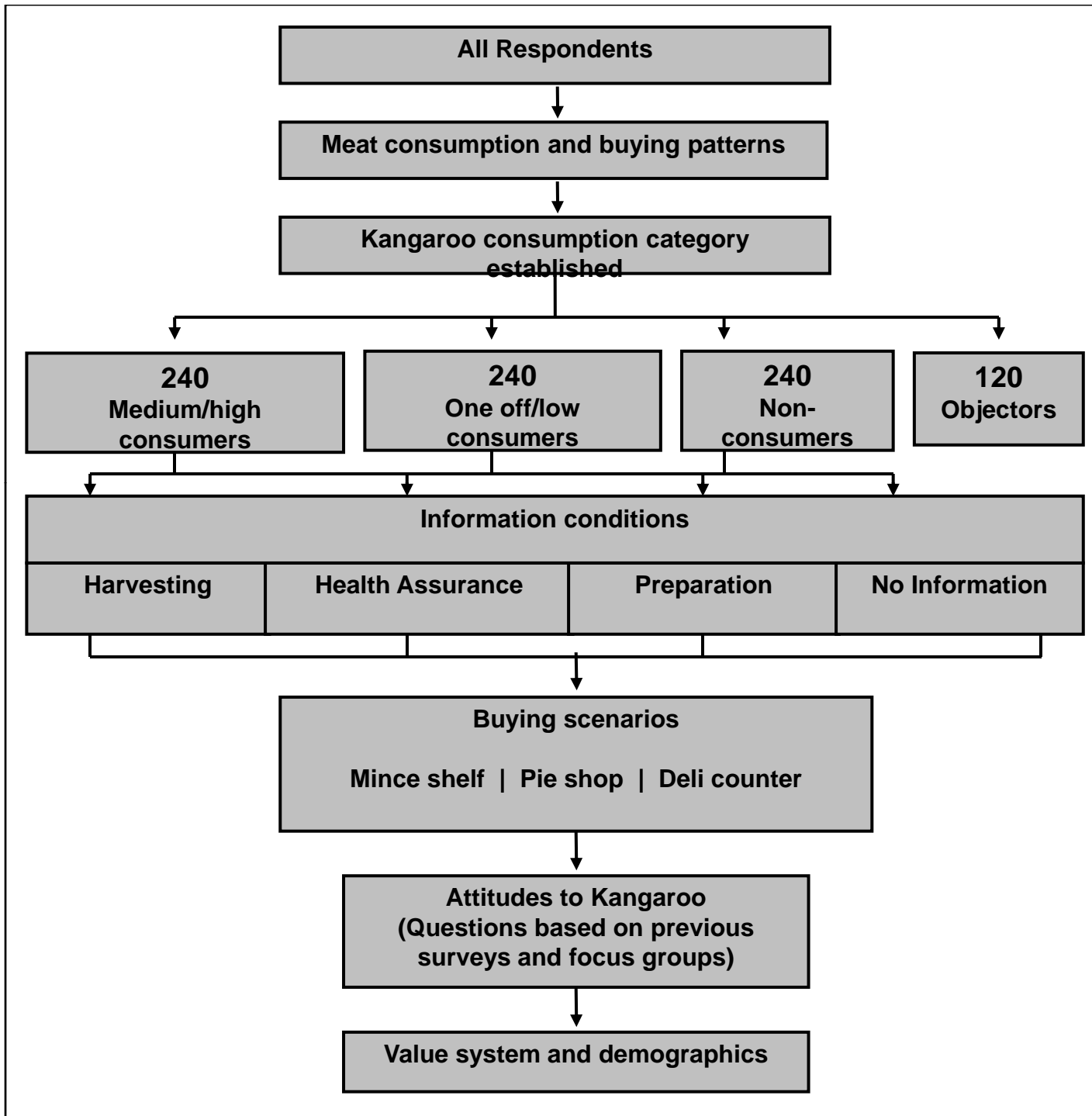
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- Consumers
  - Current use and purchase patterns
  - Response to manufactured meat products
    - kangaroo pies, mince and deli meats
  - Influence of information conditions
    - Quality control; Harvesting practices; Preparation
  - Attitudes and beliefs
- Manufacturers and Retailers
  - Current and likely future use of kangaroo manufacturing meat and factors influencing this

## What did we do?

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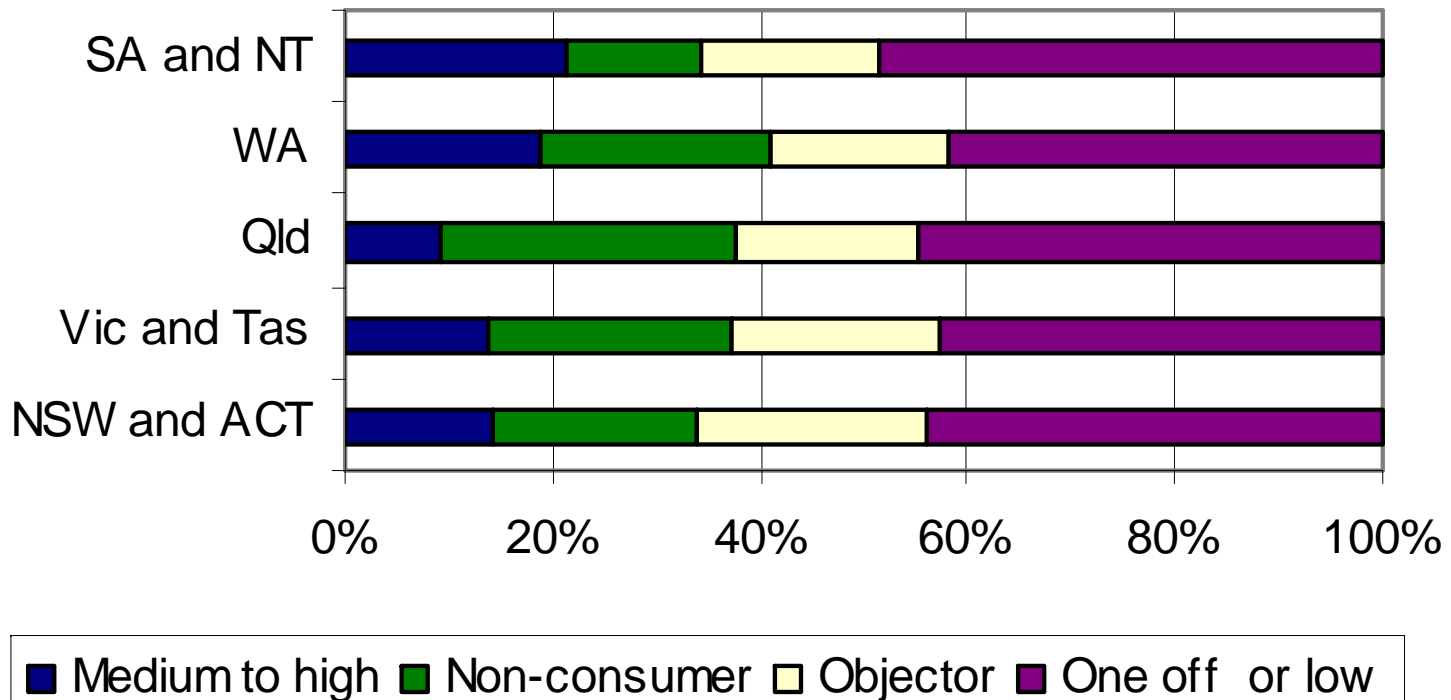
- Set up a Steering Committee
  - Ray Borda, smallgoods, RIRDC, researchers
- Interviewed manufacturers and retailers of meat products
- Conducted face-to-face and online focus groups of consumers
- Conducted an online survey of 1500 consumers which included discrete choice experiments



# Kangaroo consumption: 1997 to 2007

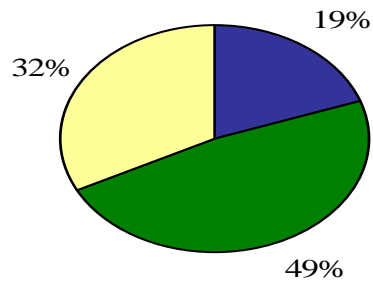
Aspect	1997 study	2007 study
Sample size	503	1599
Methodology	Telephone interviews	On-line survey
Current users	25% in past year	Not specified
Past users	26%	Not specified
Medium to high users	4 heavy users, others less than 3 times per year, 12% twice per year	14.5% at least 4 times per year
One-off users	20%	44%
<b>Total users</b>	<b>51%</b>	<b>58.5%</b>
Non-users willing to try it	Not specified	21.1%
Non-user Objectors	Not specified	20.5% (19.8%)
<b>Total Non-users</b>	<b>49%</b>	<b>40.9%</b>

# Consumer Segments by State

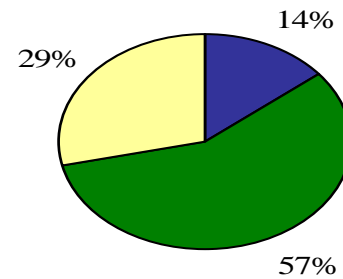


# Perceptions of availability of kangaroo

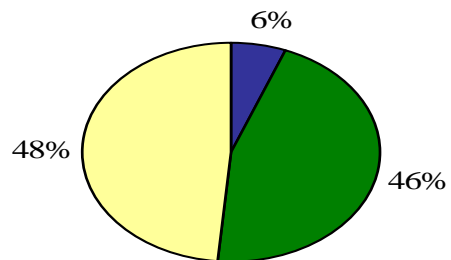
**New South Wales and Australian Capital Territory**



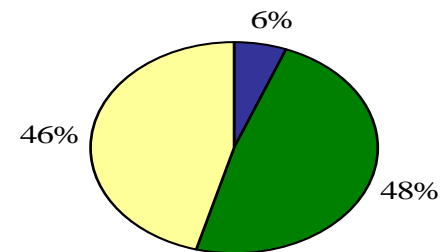
**Victoria and Tasmania**



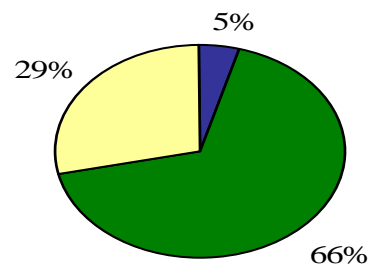
**South Australia and Northern Territory**



**Queensland**



**Western Australia**





- I have looked for kangaroo meat but haven't seen it
- It is available but not every time I would like to buy it
- It is available every time I want to buy it

Please indicate which mince or minces you would buy by using the "select to buy" menus. Once you have made your selection(s), indicate which of these is your preferred one by clicking on the button under "My preferred is.." (if you have chosen only one mince then your preferred will be that mince. If you have chosen no minces this time then it will be "I did not buy").



## Mince Meat

Sourced from	Description	Price per kg	Heart smart	I would buy ...	My preferred is ...
	Regular Beef	\$12.99		-- select to buy --	<input type="checkbox"/>
	Premium Beef	\$11.99		-- select to buy --	<input type="checkbox"/>
	Extra Trim Beef	\$8.99	<input checked="" type="checkbox"/>	-- select to buy --	<input type="checkbox"/>
	Organic Beef	\$14.99		-- select to buy --	<input type="checkbox"/>
	Regular Lamb	\$13.99		-- select to buy --	<input type="checkbox"/>
	Organic Lamb	\$12.99		-- select to buy --	<input type="checkbox"/>
	Kangaroo	\$10.99	<input checked="" type="checkbox"/>	-- select to buy --	<input type="checkbox"/>
	Veal	\$7.99		-- select to buy --	<input type="checkbox"/>
					<input type="checkbox"/> I did not buy

*Imagine now you have walked into the pie shop. In each scenario we would like you to first choose the pie you MOST prefer then the pie you LEAST prefer. Next we would like you to consider the remaining pies and again choose the one you MOST prefer and LEAST prefer.*



**Today's pie menu \$3.50**



**Egg, Bacon**



**Beef & Mushroom**



**Chicken**



**Chunky Beef & Roo**



**Beef**



**Vegetable**



**Spinach & Cheese**



**Chilli Beef**



**Pumpkin**



**Chunky Beef**

**My first preference is:**

**My second preference is:**

**I least prefer:**

**I am also not keen on:**

# Deli meats

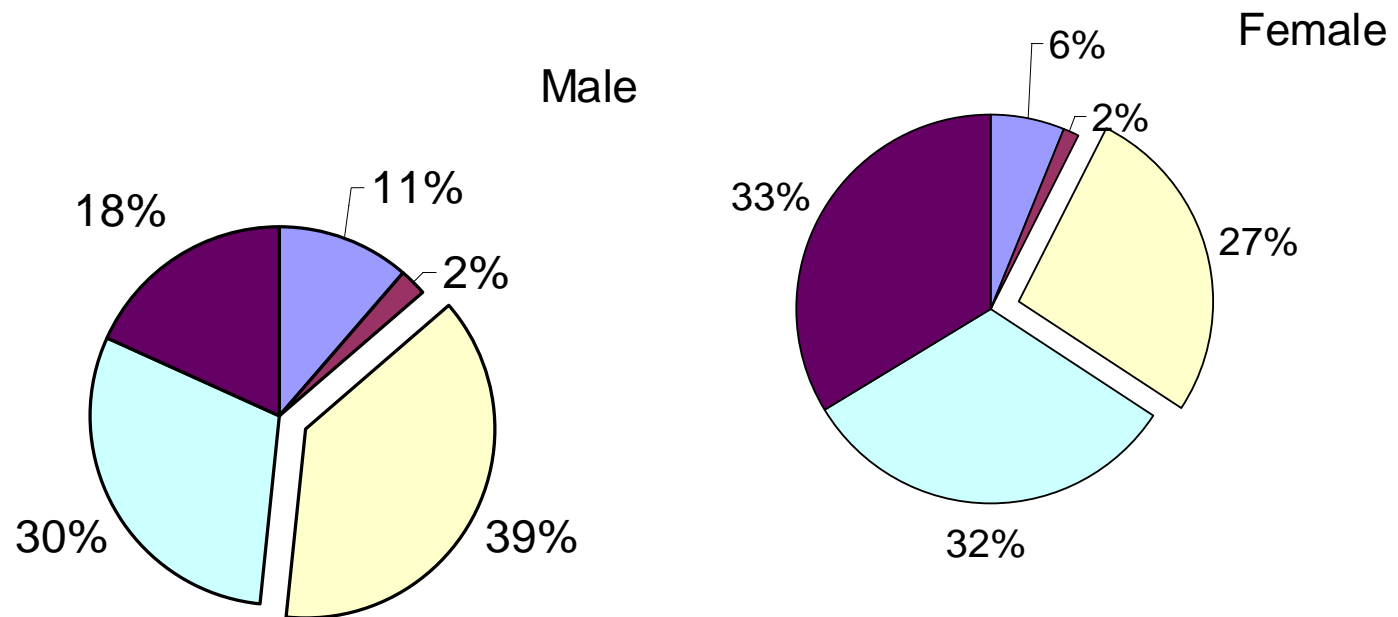
## Deli Meats



Look through the deli meats available and indicate which meats you would buy for your next typical shop if the price were acceptable.

Salami	Pressed Meat	Hams	Cured Meat	Sliced Meat
<input type="checkbox"/> Hungarian	<input type="checkbox"/> Devon	<input type="checkbox"/> Leg Ham	<input type="checkbox"/> Cabanossi	<input type="checkbox"/> Chicken
<input type="checkbox"/> Spanish / Hot	<input type="checkbox"/> Berlina	<input type="checkbox"/> Double Smoked	<input type="checkbox"/> Smoked Roo	<input type="checkbox"/> Rare Roast Roo
<input type="checkbox"/> Pepperoni	<input type="checkbox"/> Fritz	<input type="checkbox"/> Honey Ham	<input type="checkbox"/> Pastrami	<input type="checkbox"/> Turkey
<input type="checkbox"/> Csabai	<input type="checkbox"/> Smoked Turkey	<input type="checkbox"/> Soccer Ball	<input type="checkbox"/> Pancetta	<input type="checkbox"/> Rare Roast Beef
<input type="checkbox"/> Danish	<input type="checkbox"/> Boloni	<input type="checkbox"/> 97% Fat Free	<input type="checkbox"/> Kangaroo Pastrami	<input type="checkbox"/> Roast Beef
<input type="checkbox"/> Kangaroo salami	<input type="checkbox"/> Mortadella		<input type="checkbox"/> Proscuitto	

# Attitudes to kangaroo deli meats



- I have eaten one or more kangaroo deli meats and liked them
- I have eaten kangaroo deli meats but NOT liked them
- I have not eaten them but would buy them to try in the future
- I have not eaten them and would only try if someone gave them to me
- I have not eaten them and am not interested in trying them

# Beliefs on the source of kangaroo meat

Beliefs	Consumer Segments				
	Medium to high	Non-consumer	Objector	One-off to low	Total
Fenced farms much like those for emus or deer	34.2	37.9	41.1	34.1	<b>36.4</b>
Free ranging farms, like the cattle stations	30.7	35.3	32.3	39.3	<b>35.8</b>
Wild from the bush	35.1	26.7	26.6	26.6	<b>27.8</b>
<b>Total (N)</b>	<b>231</b>	<b>348</b>	<b>316</b>	<b>703</b>	<b>1598</b>

- 1. I think the whole process is totally disgusting and I would not like to think that anything anyone says or does will influence me or other people to eat kangaroo. *Objector***
- 2. I don't really have any thoughts about the process and it don't affect my willingness to try kangaroo. even cows, sheep, pigs and chickens go through a process and we still eat them. so really what is the difference on. *Non-consumer interested***
- 3. I think it would be better if they were harvested like cattle, but as long as the kill is quick and clean, and the animal has no disease and everything is well controlled then I think that is ok. *Medium consumer***
- 4. Ah well I thought they were farmed..... But since there are loads, fine by me, and they do taste really nice..... Well I would not like to be grazing in the bush and someone comes and shoot me cause I am a pest would I...But well, since there are lots of them .... [knowing how they are harvested] does not affect me at this stage, but if I do think about it I do not agree, ... *Low consumer***
- 5. I think it's better that they're out in the wild - it's kinda like free range *High consumer***

## Profile of kangaroo consumer

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- More likely than other consumers to:
  - Explore different foods (variety-seeking)
  - Purchase organic meats
  - Buy their meat in markets or use a variety of outlets
  - Comfortable (reconciled) with the animal – meat nexus
- Just as likely to:
  - Be people that prefer their meat cooked medium to well done as rare or medium rare

# Interviews of retailers and manufacturers

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- 2 interviews before and 3 after the survey (LR, LPM, LSM, SPM, SMR)
- 8 conversations before and 8 after
- 5 refusals before and 4 after
- 8 avoidances before and 8 after

# Large manufacturers and retailers

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- New products have to prove themselves elsewhere then maintain sales to stay
- Some trends:
  - Less from deli counter, more pre-packaged
  - Favour less processed, lower fat
  - Conversion of specialist smallgoods to food company
- Slight changes to products and brand over time
- Healthy versions of otherwise 'unhealthy' products **MUST** taste good
- Big 3: health, convenience, taste

## Small manufacturers and retailers – niche/gourmet

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- Key ‘mainstay’ products
- Constant development of new products
- Willing to experiment with small volumes
- Open to using kangaroo but it would be a big challenge to move it into the ‘mainstay’ category

## Manufacturer & Retailer attitudes to using kangaroo

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- Transparency apparently a big issue with large manufacturers (and retailers?)
- Need a clear chain of custody and trace-back
- Lack of awareness/demand barrier now, harvesting may be barrier in future
- Lower barriers for small M & Rs
- Need 'campaign' from industry for growth – very unlikely without.

# Implications

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- Kangaroo consumers eating more
- Cooked meat preferences – ok to be well done??
- Kangaroo seen as healthy and those who try it like it
- Availability still a constraint
  - Consumers can't buy when they wish
  - Visibility of kangaroo needs to improve
- Mince is a viable option but price sensitive (500g packs)
- Deli meats a good way in
- Pie most likely to attract attention is Chunky Beef & Roo
  - Kangaroo pie purely gourmet at this stage

## Implications cont.

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- Large proportion of consumers think kangaroo is farmed/confined/managed
  - increased sensitivity to hygiene and humane slaughter
- Large retailers/manufacturers require greater consumer awareness of product and greater transparency of process
- Small/niche/gourmet manufacturers and retailers require greater consumer awareness and a product with a story/angle.

# Recommendations

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- To grow the market
  - Appeal to healthiness
  - Reconsider the well cooked consumer
  - Increase visibility
    - In-store tastings
    - In-store promotion and special events promotions
    - Move position in-store (eg. Mince to mince shelf)
- Address potential threats
  - Decrease the visibility of the animal
  - Neutralise the potential impact of knowledge of the harvest process by attention to quality management from field to shelf – this will also help with manufacturers and retailers

# Take home messages

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- Very few objectors
- Clear potential to increase domestic consumption especially variety seekers
- Increase visibility of the meat and decrease the visibility of the animal – make it normal
- Mince is most promising manufactured meat product – smaller packs with other minces
- Kangaroo deli meats are a good way in
- Make harvest a plus!!
- Consumers like to think farmers are involved
- Quality control and transparency are essential for expansion

- In terms of its profile, the industry needs to generate consistent messages to all stakeholders of a uniquely Australian resource that is managed through careful harvesting, is humane and sustainable, and is good for the environment. It needs to separate itself from the culling for pest management that often attracts strong emotional responses from the community and creates images of poor quality control. We recommend the industry:

- Investigate chain of custody management to improve consistency of industry practice.
- Investigate the impact of stronger involvement by landholders in harvest management on quality and stakeholder perceptions of kangaroo meat
- Develop and test different approaches to achieving consistent industry messages and branding.