

# Preference structure for lamb meat consumers. A Spanish case study

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## Abstract

There is a current tendency in the European Union member countries to cut down on meat consumption. This tendency is not due as much to the traditional income–price factor, but to other attributes whose influence is gaining relative importance. Some of them are: quality, image, health, food safety and changes in people's taste. In addition, the relative importance of different attributes valued by the consumer must be weighed in order to develop marketing strategies which increase lamb meat consumption. In order to determine these preferences, 400 consumers were asked to evaluate different attributes (price, certification, origin, and commercial type) of lamb meat. Results obtained by means of conjoint analysis techniques show that regular consumers as well as occasional ones show a preference for lamb meat type. In this sense, a market share simulation of preferred (suckling and “ternasco”) types proved that regular consumers generally prefer suckling lamb to “ternasco” lamb when both are from Castilla-La Mancha.

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## 1. Introduction

In Spain, as well as in the rest of the European Union member countries, there have been notable changes in the last few years, especially in the last half of the 1990s. The tendency in some high-priced foods, such as meat, is to cut down on per capita consumption in spite of progressive salary increases. This tendency seems to indicate that the traditional determinants (income and price) play a lesser role in consumer behaviour when buying meat and that there are other attributes such as: quality, image, health, food safety... whose influence has acquired relative importance (Barrena, Sánchez, Gil, Gracia, & Rivera, 2003; Becket, Benner,

& Glitsch, 1998; Richardson, MacFie, & Shepherd, 1994; Verbeke, Ward, & Viaene, 2000; Woodward, 1988) along with a simultaneous change in consumers' tastes and preferences (Anderson & Shugan, 1991; Moschini & Meilke, 1989; Piggott, Chalfant, Alston, & Griffith, 1996; Reynolds & Goddard, 1991; Rickertsen, 1996). Out of the previous attributes, food safety is a high priority when marketing meat, since customers feel that meat consumption has a decided effect on health (Álvarez & Álvarez, 1998; Sánchez, Sanjuán, & Akl, 2001a; Unnevehr, Roberts, & Jensen, 1998).

The current meat market in Spain tends to be well-established, with a glut of meat products that may have occasional slumps (e.g. consumption fell by 2% between 1990 and 1999, levelling off at 64.9 kg/person/year in 1999) (Department of Agriculture, Fishing & Food of Spain, 2001). Meat markets also show an important substitution effect, whether between meat from different species or between different breeds from the same species. This gives way to a very competitive market, where one of the ways to compete is by the differentiation of

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meat production through quality badges. In this sense, these quality badges conferred by the government recognize products that possess certain characteristics or a clear reputation whose causes can be attributed to production and/or elaboration in a determined area.

With the aim of competing in the fresh lamb meat market and simultaneously increasing consumption (about 3.3 kg/person/year in 1999, 13.2% less than in 1990) (Department of Agriculture, Fishing & Food of Spain, 2001), the Manchego Lamb Protected Geographic Indication (PGI) was created in 1995 (Council of Agriculture & Environment of Regional Government of Castilla-La Mancha (Spain), 1995). This body also provides lamb meat consumers with a positive image (Maguire, 1994) as a guarantee of high quality as well as greater food safety (Acebron, Magin, & Dopico, 2000; Yeung & Morris, 2001).

Since lamb meat consumption is very limited compared to other types of meat in general, the purpose of this paper is to determine what consumer preferences are regarding the purchase of lamb meat, the relative importance of product attributes, (examining, in particular, the certification attribute as an indicator of food safety and using it as an information tool about food healthiness), and lastly, an estimation of the market share for Manchego lamb PGI. The ultimate purpose in understanding the consumer preference structure for lamb is none other than its utilization by enterprises in elaborating basic commercial strategies.

## 2. Materials and methods

The chief source of information used was personal interviews given to a representative sample of customary food buyers for home consumption, residents in Castilla-La Mancha (Spain) (Fig. 1).

The poll was carried out during the month of March, 2004, on a stratified random sample per number and age of inhabitants of every province in Castilla-La Mancha (Albacete, Ciudad Real, Cuenca, Guadalajara y Toledo), on persons shopping in stores, supermarkets and malls.



Fig. 1. Castilla-La Mancha (Spain).

400 questionnaires were obtained. Maximum error did not surpass 5.0%, for a 95.5% confidence level ( $k = 2$ ), under the principle of maximum indetermination ( $p = q = 50\%$ ). Before field work, a preliminary questionnaire was given to 15 people who normally purchase groceries to confirm that the questions on the poll were well-designed and understandable.

Data analysis included carrying out a multivariate analysis by means of the Conjoint Analysis (CA) technique (Green & Rao, 1971). Through the CA, consumer preference structure for lamb was determined, with the aim of identifying, exploring and quantifying their attitudes to diagnose what consumers really prefer.

Nowadays, market researchers are greatly interested in the composition and formation of consumer preferences. Such preferences, which depend on information received by the consumer, are formed both by extrinsic elements (labelling, place of purchase, price, origin, etc.) and intrinsic elements (colour, texture, fat content, freshness, etc.). The former are part of the production process while the latter are part of the product itself. In turn, the composition of consumer preferences seems to be linked to a quest for quality as well as an interest on the part of the consumer in food safety and health matters (Becker, 2000; Grunert, 1997; Grunert, Bech-Larsen, & Bredahl, 2000; Steenkamp, 1990; Verbeke & Vackier, 2004).

In this study, the attributes and levels selected to define the lamb product, as seen in similar studies done by Sánchez et al. (2001a, 2001b) have been adapted to commercial types in Castilla-La Mancha. These are: *price* (9, 12 and 16 €/kg), *certification* (yes, no), *origin* (Castilla-La Mancha, Rest of Spain, and imported) and *type* (suckling, “ternasco” and feeder lambs).<sup>2</sup>

By combining these four attributes and their 11 levels, 54 potential profiles would be obtained, which is considered an elevated number of products. Therefore an orthogonal design was used that reduced the combinations to nine (Bretton-Clark, 1986). The choice of the orthogonal design instead of presenting all possible product combinations limits the information obtained solely to the principal attribute effects. Although this reduces the number of interactions, the consumer is only obliged to choose between nine products (Table 1), thus preventing fatigue and routine answers (Braña, Ferraces, & Varela, 1995; Kirk, 1982).

Once the set of hypothetical lamb meat products was designed, the questionnaire was presented to consumers in the form of cards. They were asked to arrange them according to their preferences, by assigning a rank from

<sup>2</sup> Suckling meat comes from a lamb fed on mother's milk for 25–45 days, yielding a carcass of less than 7 kg when butchered. “Ternasco” meat comes from the lamb butchered between 60 and 90 days, with a carcass weighing between 10 and 14 kg. Feeder lambs are butchered at 90–100 days, yielding a 15-kg carcass.

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