



ETHNIC LAMB BUYING AND PREPARATION BEHAVIOR AND PREFERENCES

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LAMB COUNCIL SESSION
JOINT SESSION WITH THE AMERICAN LAMB BOARD
AMERICAN SHEEP INDUSTRY ASSOCIATION ANNUAL CONVENTION
RENO, NEVADA
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OUTLINE



WHY We Did the Research



HOW We Did The Research



WHO We Interviewed



WHAT We Found



WHAT It Means for Lamb Promotion



WHY WE DID THE RESEARCH

U.S. Ethnic Population Is Growing Rapidly:

- Consume 58% of the lamb
- Already account for 35% of population
- If ethnic population growth rates continue, U.S. lamb demand could grow exponentially
- Will that consumption be American lamb and benefit U.S. sheep producers ... or imported lamb and benefit foreign producers?



WHY WE DID THE RESEARCH

Promoting to Ethnic Consumers to Grow the Demand for American Lamb

- Key to Success: Understanding who they are, their lamb needs and their lamb purchasing and buying behavior and preferences
- Unfortunately, little information is available about this important segment of U.S. lamb markets



WHY WE DID THE RESEARCH

Research to Support Targeting Lamb Promotion to Ethnic Consumers

- New and strategically important information on ethnic groups who consume lamb:
 - » **Socio-demographic characteristics**
 - » **How, where, and why they buy lamb**
 - » **The specific characteristics of lamb that they value**
 - » **The factors that drive their purchasing behavior**
 - » **Their perceptions of the acceptability of domestically produced vs. imported lamb**



HOW WE DID THE RESEARCH

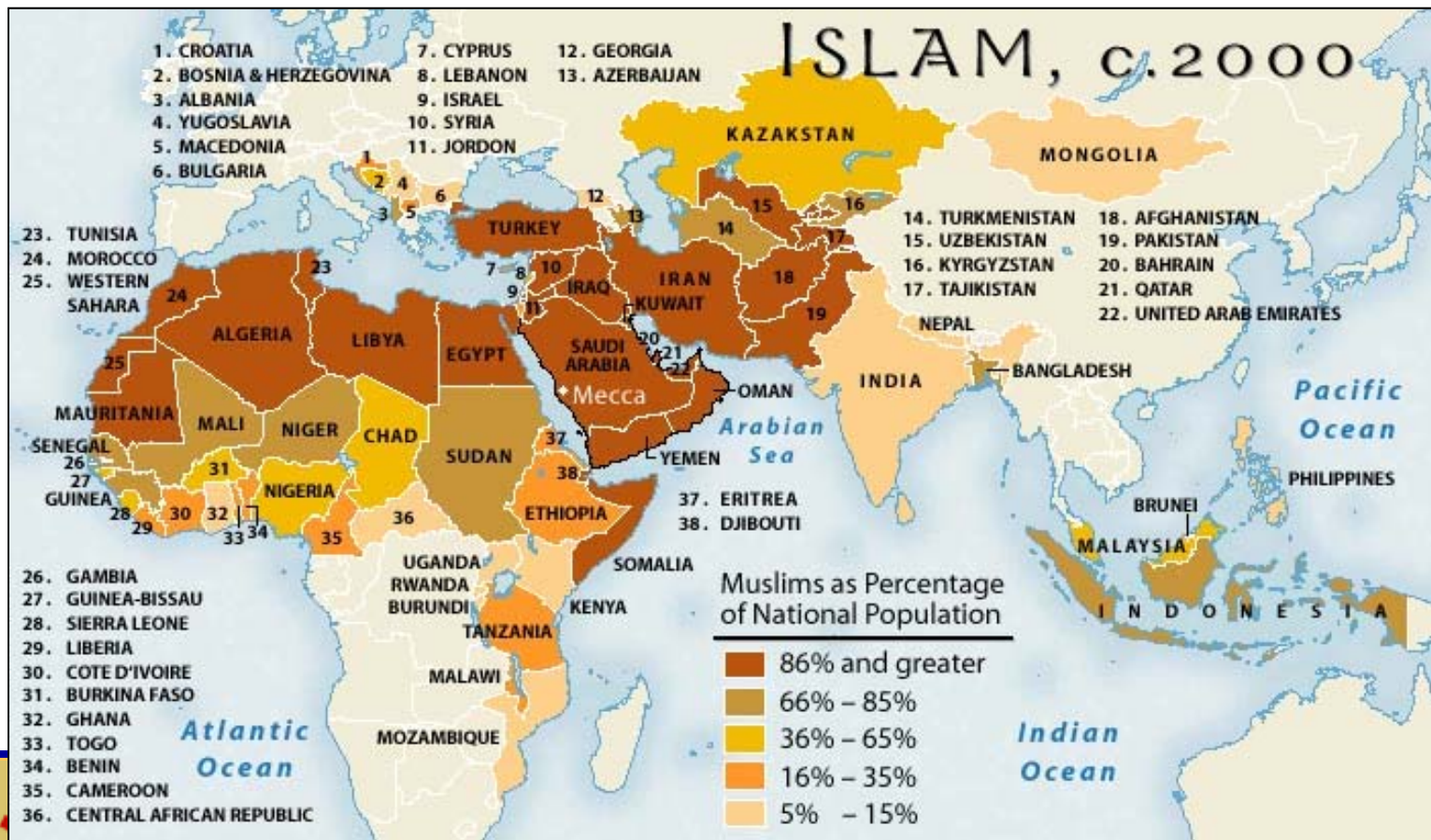
Face-to-Face Interviews:

- Five target ethnic groups:
(1) Muslims, (2) Jews, (3) Asians, (4) Hispanics, (5) Greeks
with primary emphasis on the Muslim-American community.



HOW WE DID THE RESEARCH

- All Arabs are Muslim but not all Muslims are Arabs
- Many Asians, Africans, and East Europeans are also Muslim



BOARD

HOW WE DID THE RESEARCH

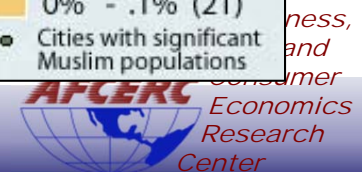
Face-to-Face Interviews:

- Five target ethnic groups:
(1) Muslims, (2) Jews, (3) Asians, (4) Hispanics, (5) Greeks
with primary emphasis on the Muslim-American community.
- Six target geographic locations:
(1) New York/New Jersey area, (2) Detroit/Dearborn, Michigan,
(3) Chicago, Illinois, (4) Southern California (Los Angeles and
San Diego), (5) St. Louis, Missouri, and (6) Houston, Texas



HOW WE DID THE RESEARCH

- Sites: Butcher shops, local retail stores, slaughter facilities, chain grocery stores, other retailers



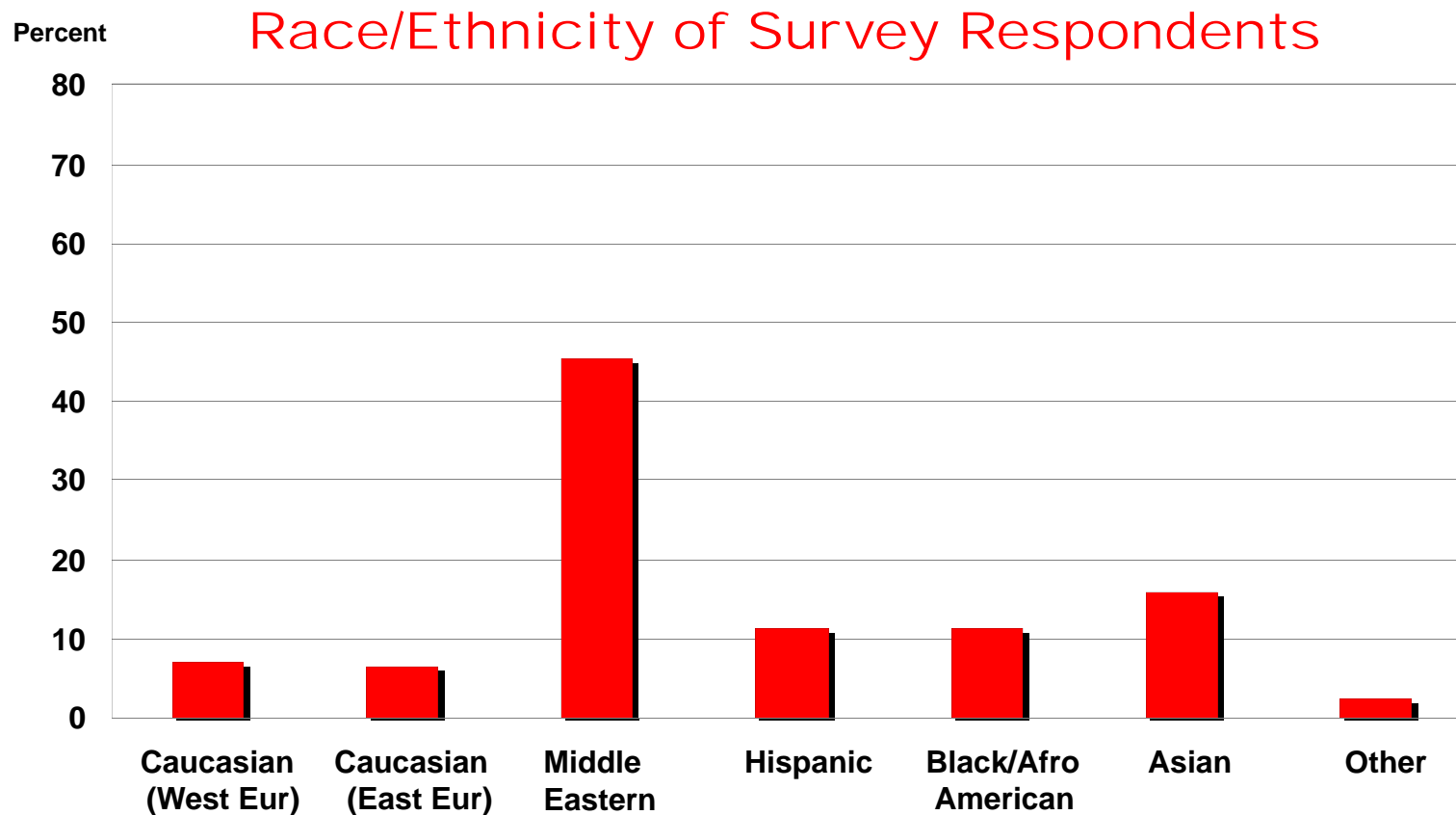
HOW WE DID THE RESEARCH

Face-to-Face Interviews:

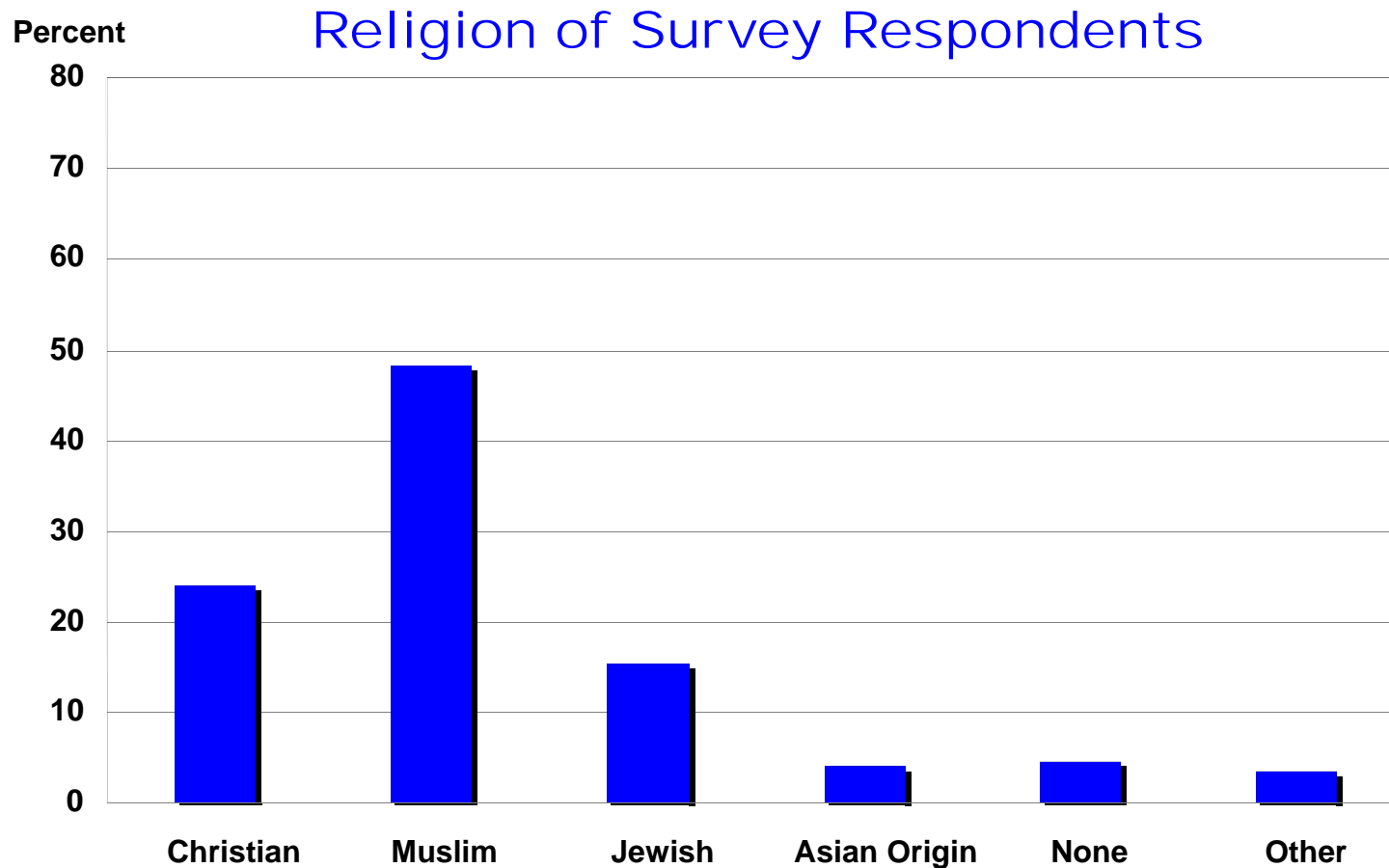
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- Six target geographic locations:
(1) New York/New Jersey area, (2) Detroit/Dearborn, Michigan, (3) Chicago, Illinois, (4) Southern California (Los Angeles and San Diego), (5) St. Louis, Missouri, and (6) Houston, Texas
- Three sections of questions on survey
(1) Demographic information, (2) Lamb purchasing behavior, (3) Lamb consumption and preparation behavior



WHO WE INTERVIEWED

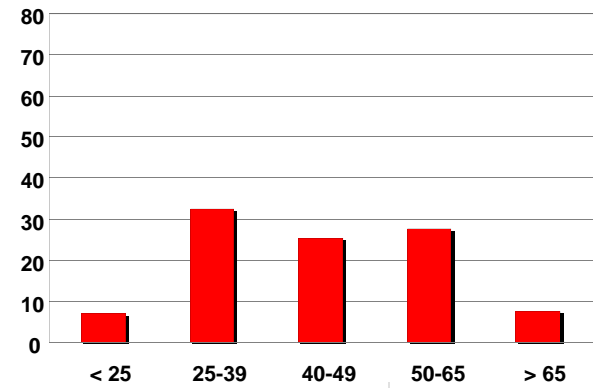


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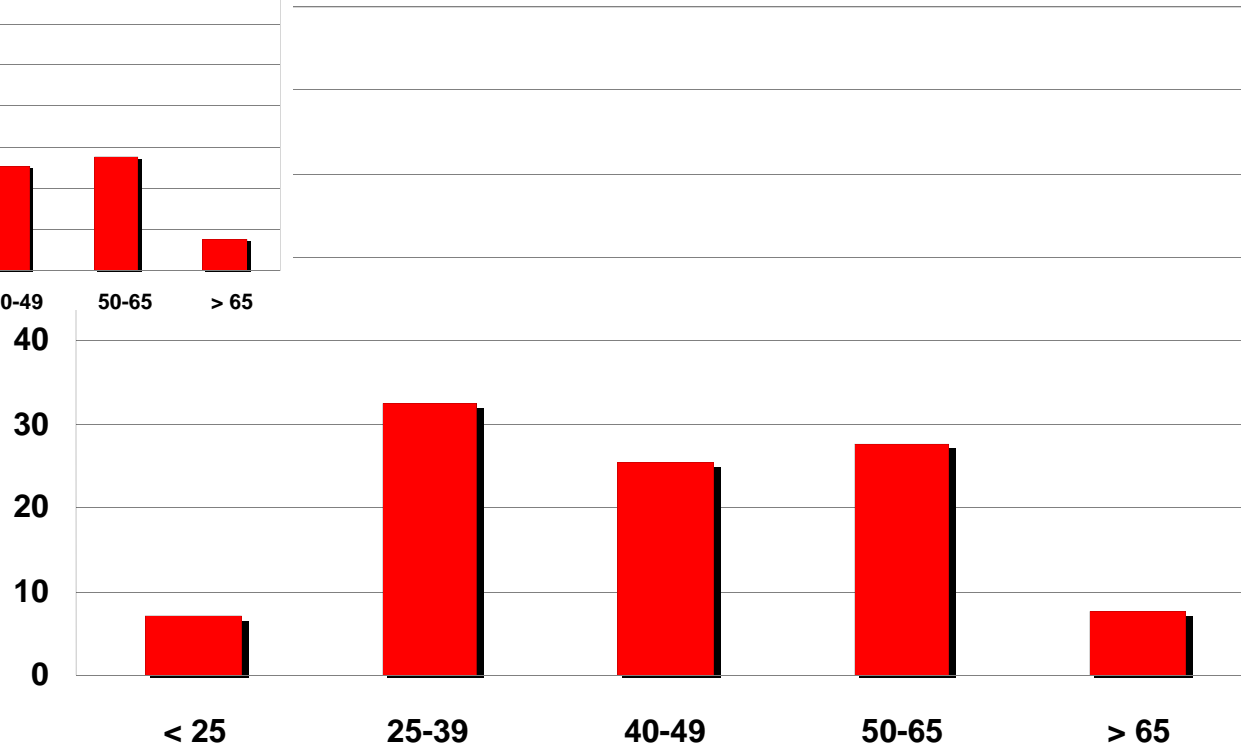


WHO WE INTERVIEWED

Percent Age of Survey Respondents

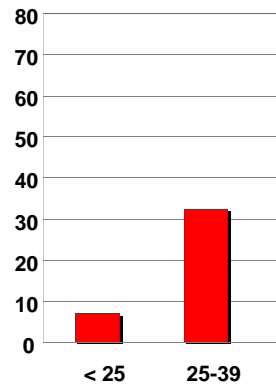


Age of Survey Respondents

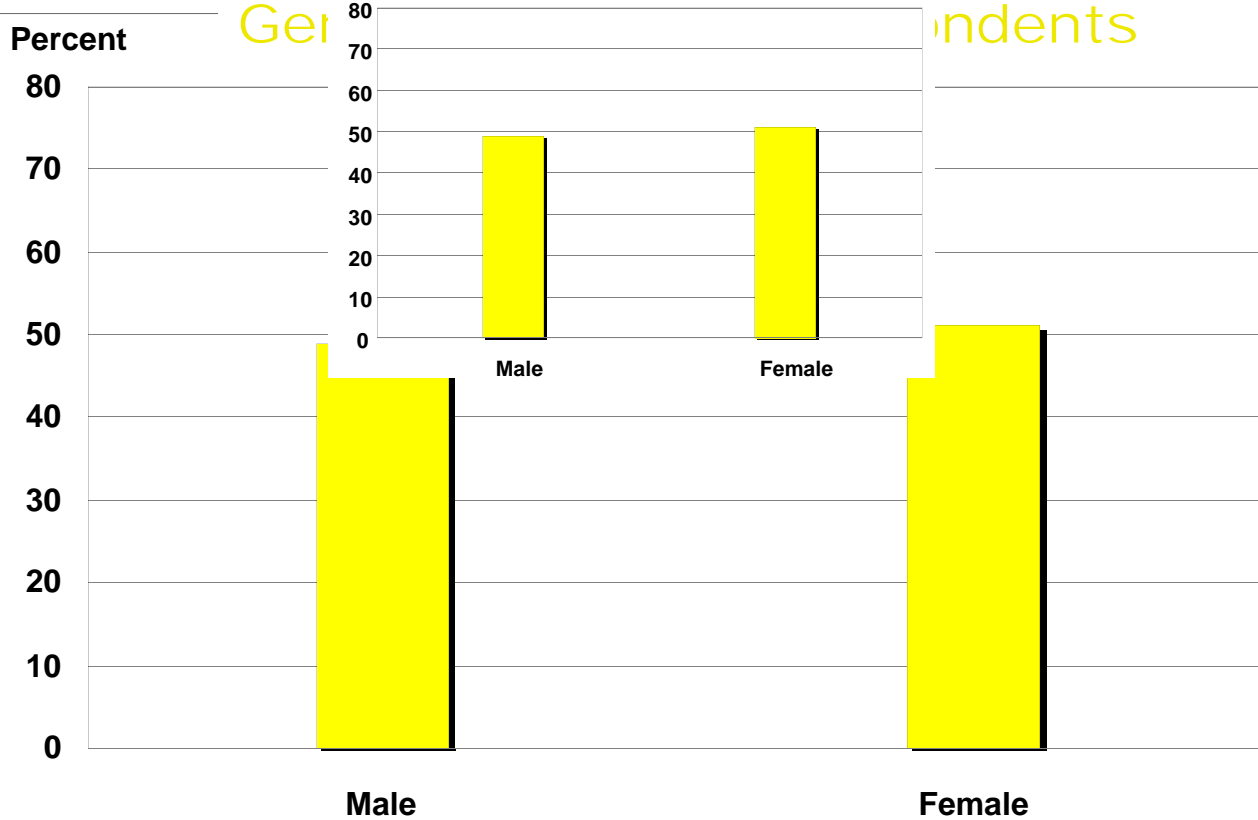


WHO WE INTERVIEWED

Percent Age of Survey Respondents

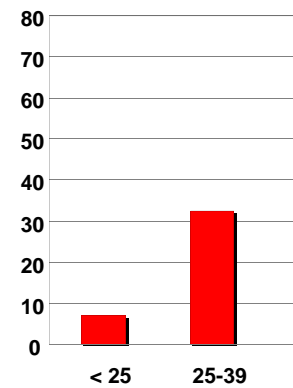


Gender of Survey Respondents



WHO WE INTERVIEWED

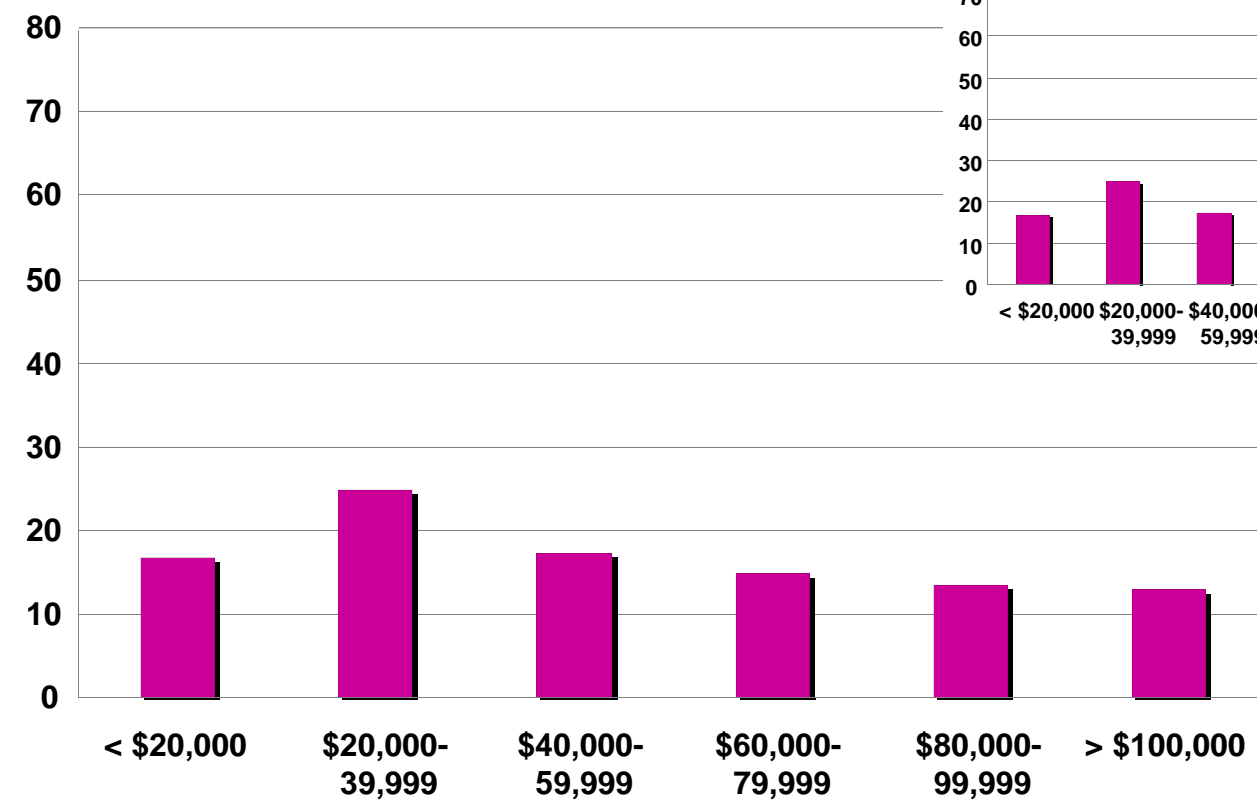
Percent Age of Survey Respondents



Gender of Survey Respondents

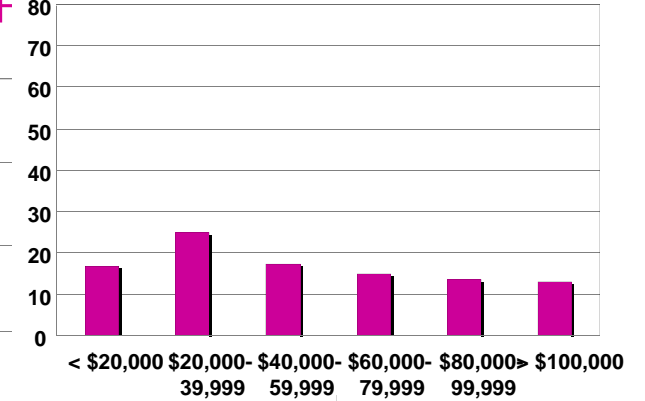
Household Income of Survey Respondents

Percent

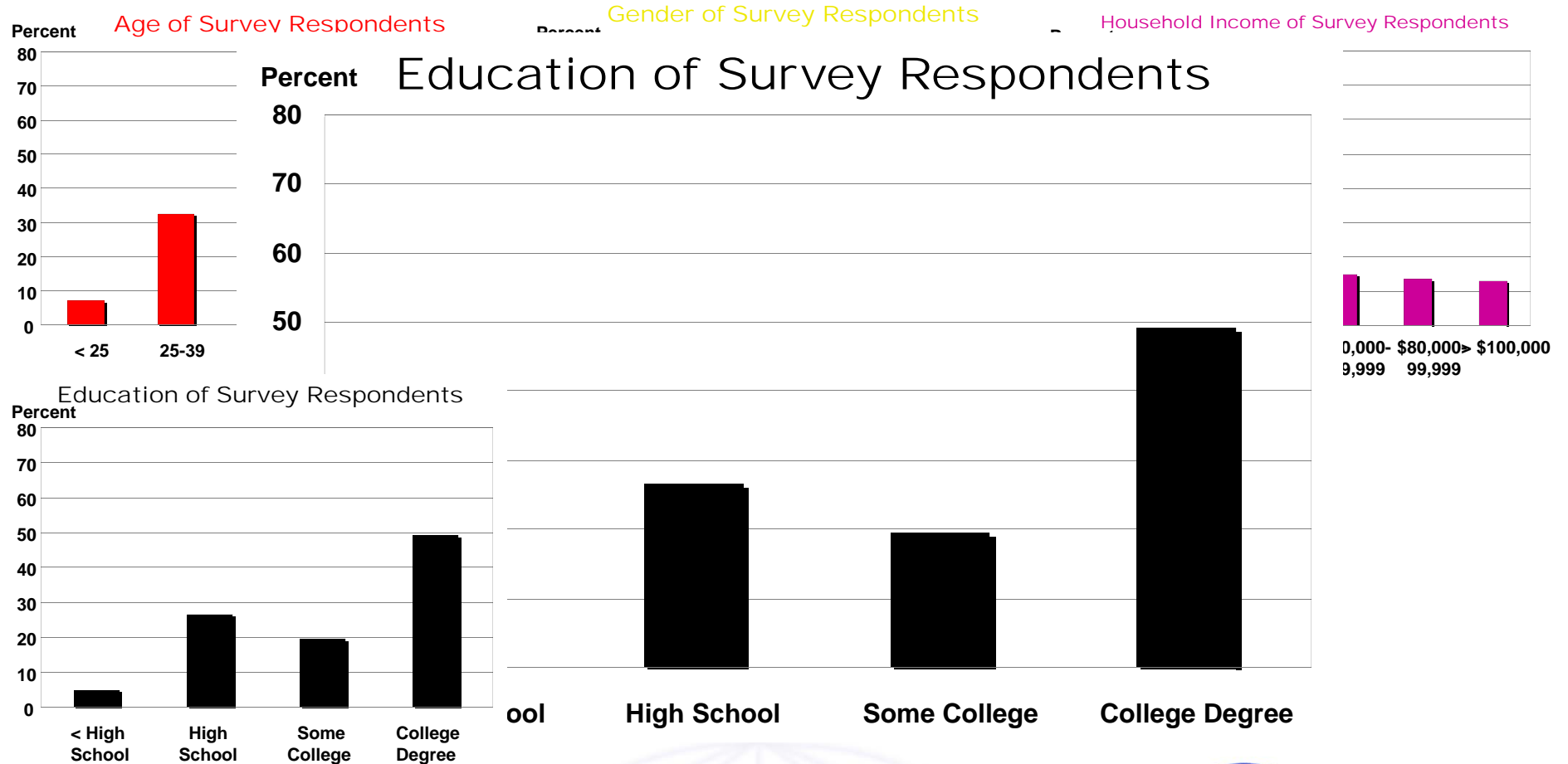


Household Income of Survey Respondents

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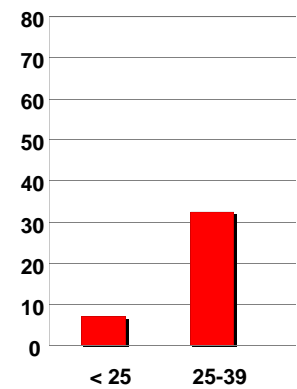


WHO WE INTERVIEWED



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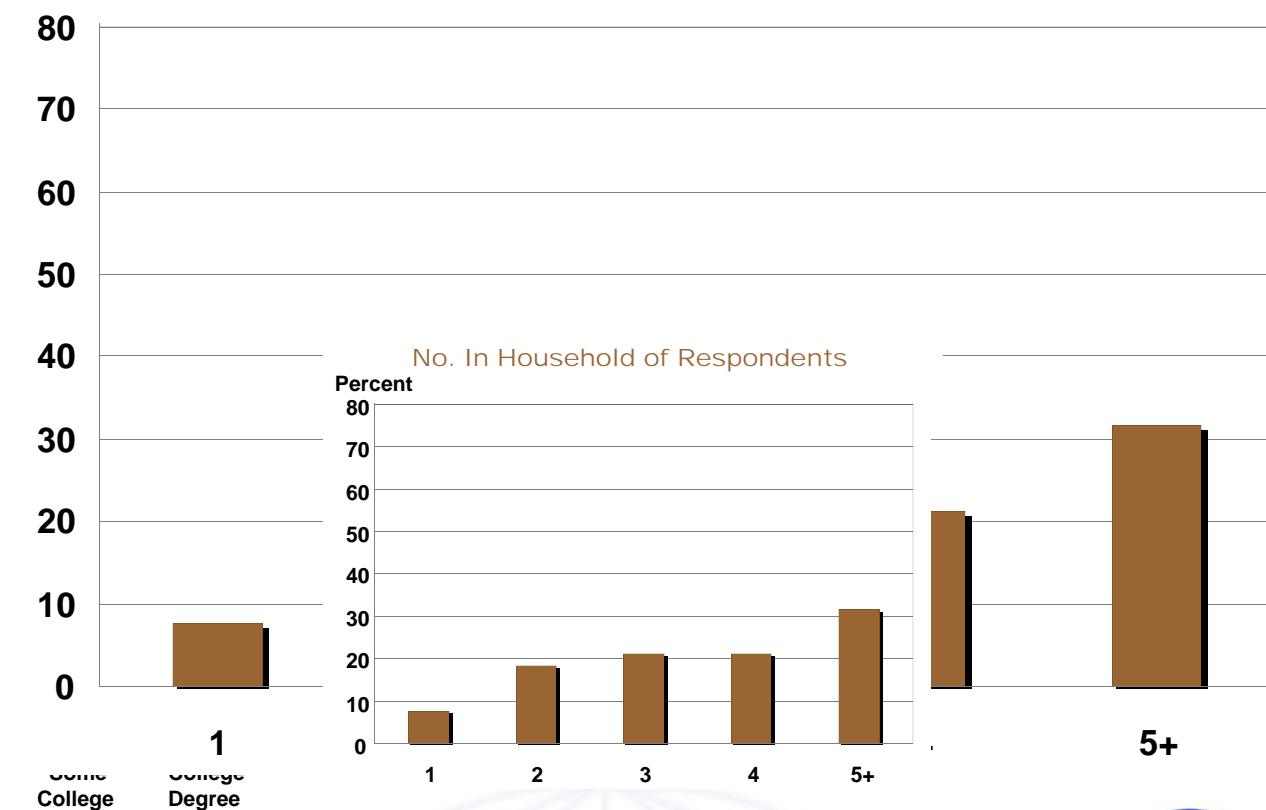
Percent Age of Survey Respondents



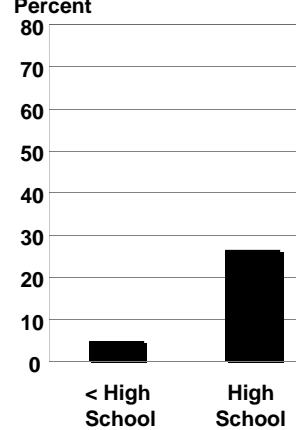
Gender of Survey Respondents

Household Income of Survey Respondents

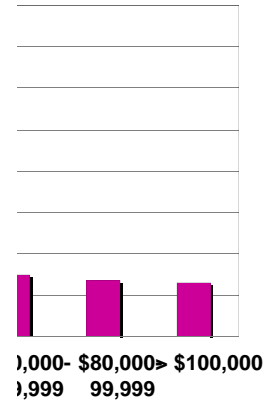
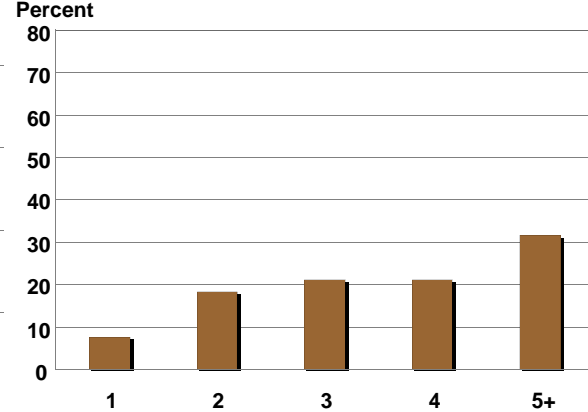
Percent No. In Household of Respondents



Percent Education of Survey Respondents

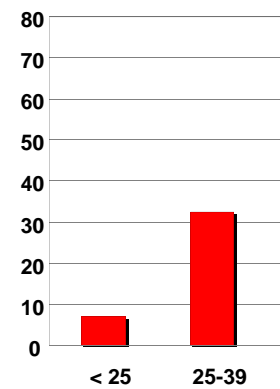


Percent No. In Household of Respondents



WHO WE INTERVIEWED

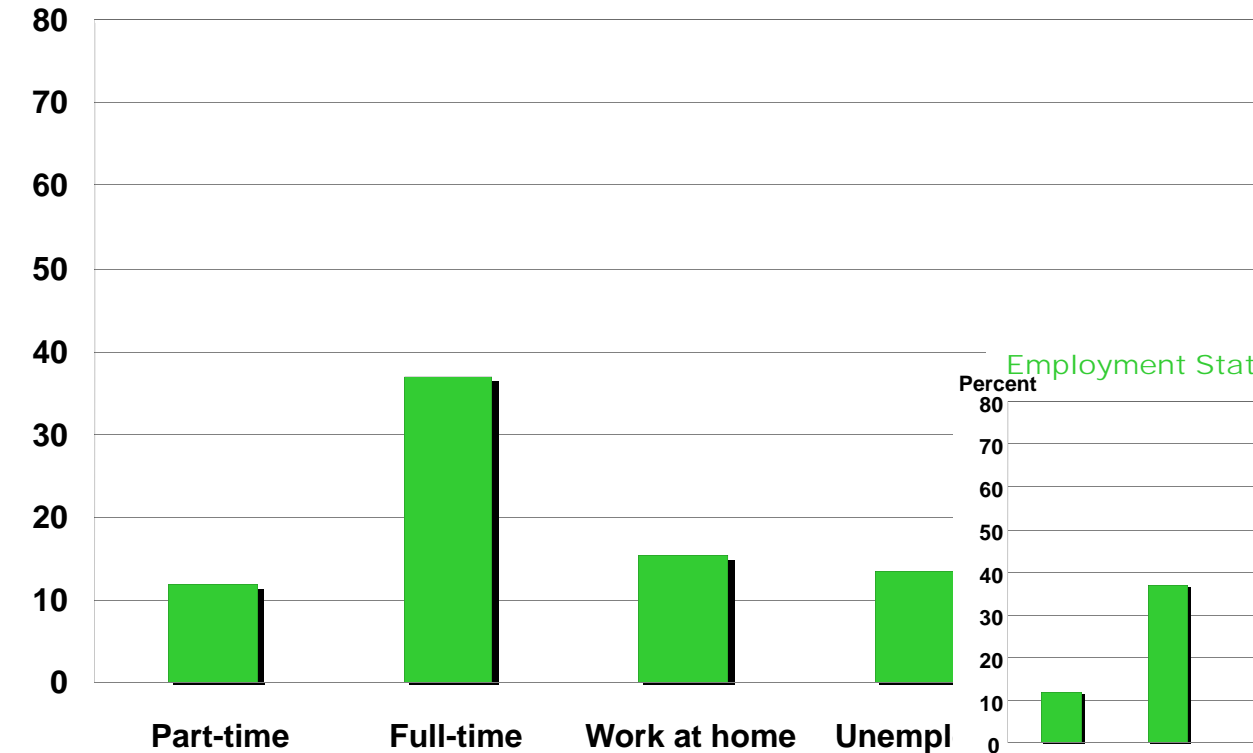
Age of Survey Respondents



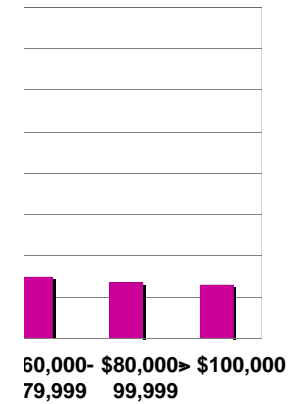
Gender of Survey Respondents

Employment Status of Respondents

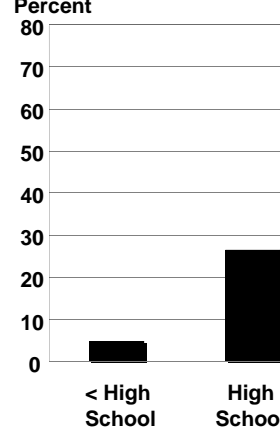
Percent



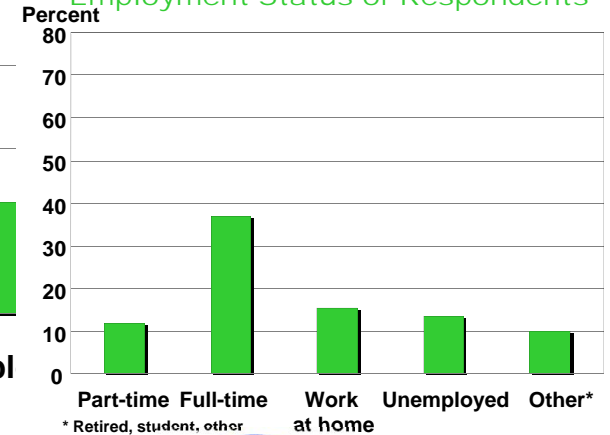
Household Income of Survey Respondents



Education of S



Employment Status of Respondents

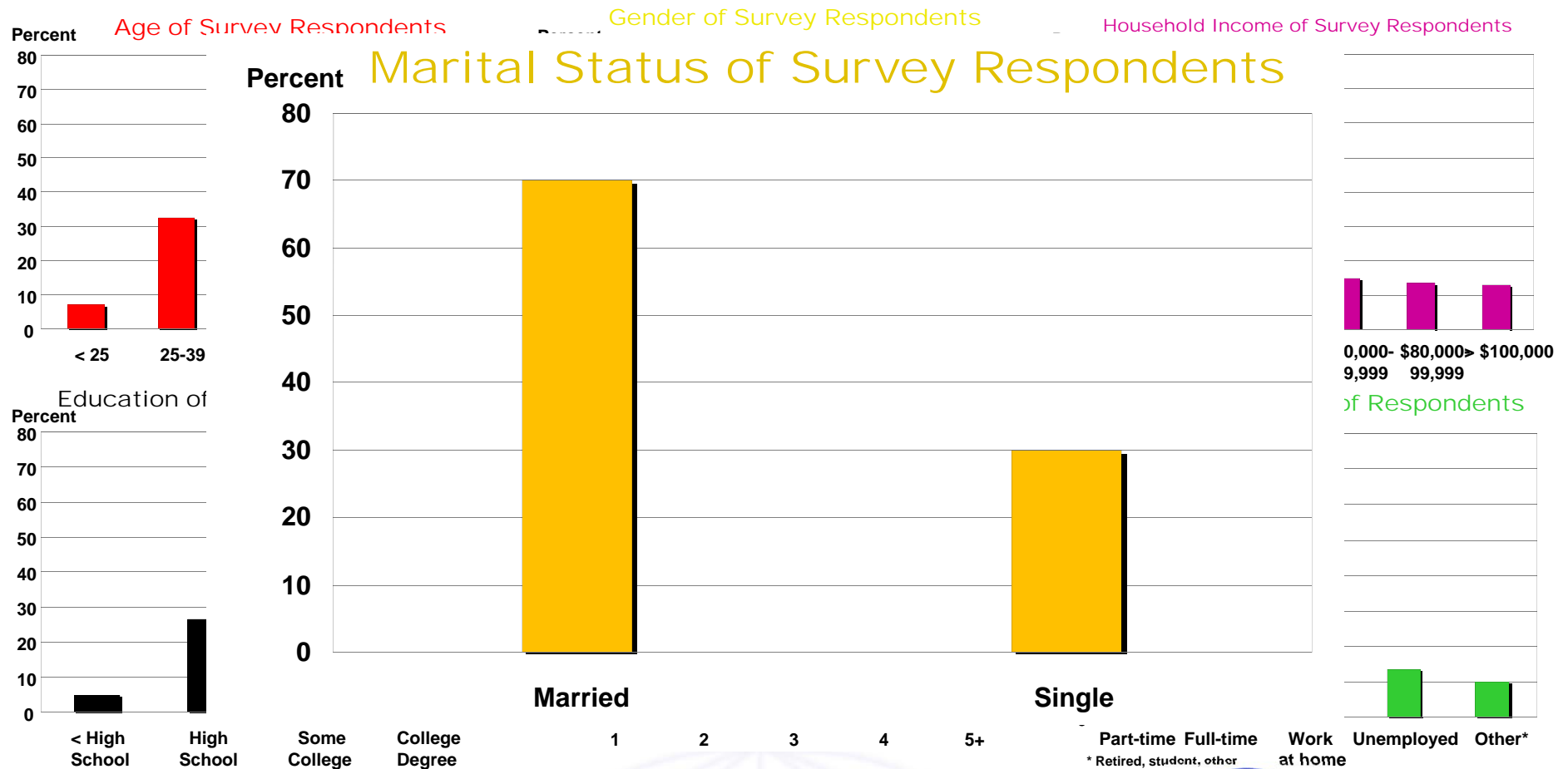


* Retired, student, other

* Retired, student, other



WHO WE INTERVIEWED



WHO WE INTERVIEWED

Excellent Demographic Profile of Survey Respondents:

- Consistent with other studies
 - Pew Center
 - A.C. Nielsen
- Consistent with U.S. Census across race/ethnicity
- Implies believability of results



WHAT WE FOUND

Frequency of Lamb Consumption

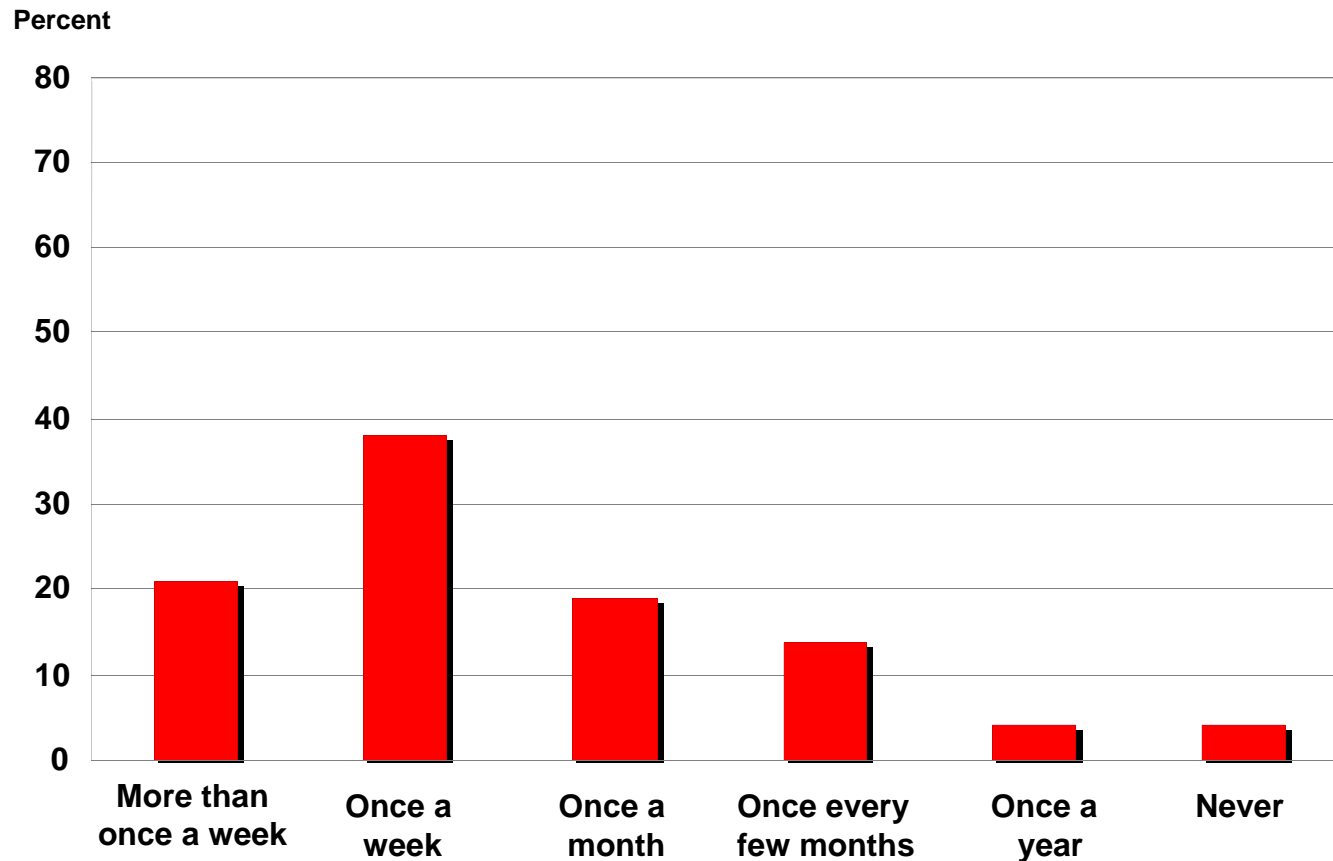
- Home preparation of lamb
- Away-from-home consumption of lamb
- Holidays or other special occasions when lamb is prepared at home.
- Reasons for purchasing lamb at the interview location



WHAT WE FOUND

Home Preparation of Lamb

- 60% prepare lamb at home at least once a week



WHAT WE FOUND

Home Preparation of Lamb

- But Substantial Differences by Race/Ethnicity

Race/Ethnicity	More than once a week	Once a week	Once a month	Once every few months	Once a year	Never	Total
	----- % -----						
West European	9.1	9.1	45.5	27.3	9.1	0.0	100.0
East European	36.4	9.1	27.3	18.2	9.1	0.0	100.0
Middle Eastern	22.4	57.9	9.2	5.3	3.9	1.3	100.0
Hispanic	10.5	5.3	26.3	31.6	10.5	15.8	100.0
Afro-American	10.5	31.6	26.3	15.8	0.0	15.8	100.0
Asian	29.6	33.3	22.2	14.8	0.0	0.0	100.0
Other	25.0	50.0	25.0	0.0	0.0	0.0	100.0

WHAT WE FOUND

Home Preparation of Lamb

- And Also by Religion

Religion	More than once a week	Once a week	Once a month	Once every few months	Once a year	Never	Total
	----- % -----						
Christian	20.0	17.5	25.0	22.5	5.0	10.0	100.0
Muslim	21.0	59.3	14.8	4.9	0.0	0.0	100.0
Jewish	19.2	30.8	19.2	11.5	19.2	0.0	100.0
Asian Origin	28.6	14.3	42.9	14.3	0.0	0.0	100.0
None	37.5	0.0	12.5	25.0	0.0	25.0	100.0
Other	0.0	0.0	16.7	66.7	0.0	16.7	100.0

WHAT WE FOUND

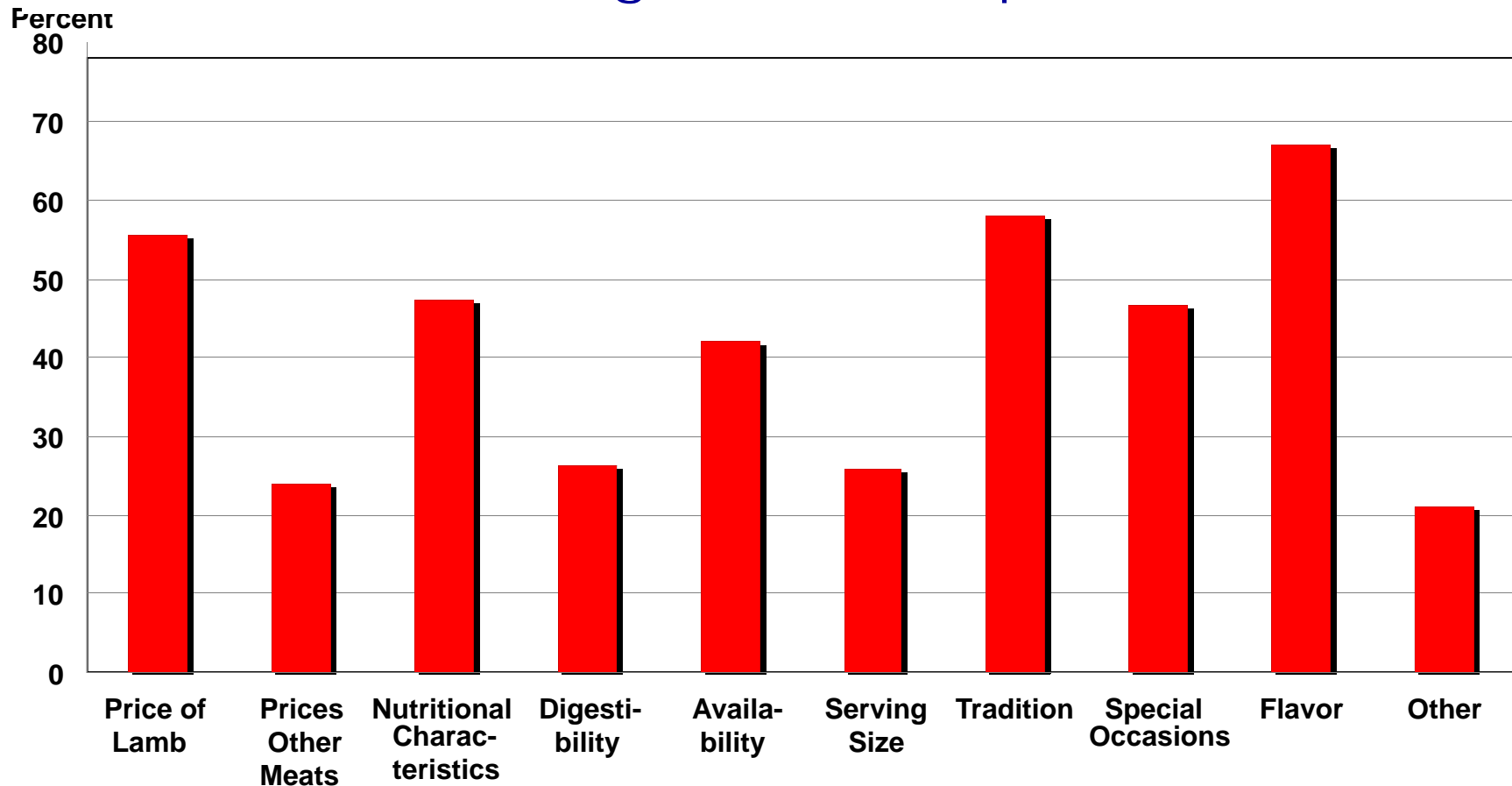
Lamb Consumption Behavior & Preferences

- Factors affecting their lamb purchases
- Their understanding of terms “strong” and “mild” lamb and their preferences for each
- Factors that need to change before they would buy more lamb
- Other meats/seafood as substitutes for lamb
- Preferences/perceptions of American vs. imported lamb
- Preferred cuts of lamb
- Preparation and cooking methods
- Problems encountered with lamb

WHAT WE FOUND

Lamb Consumption Behavior & Preferences

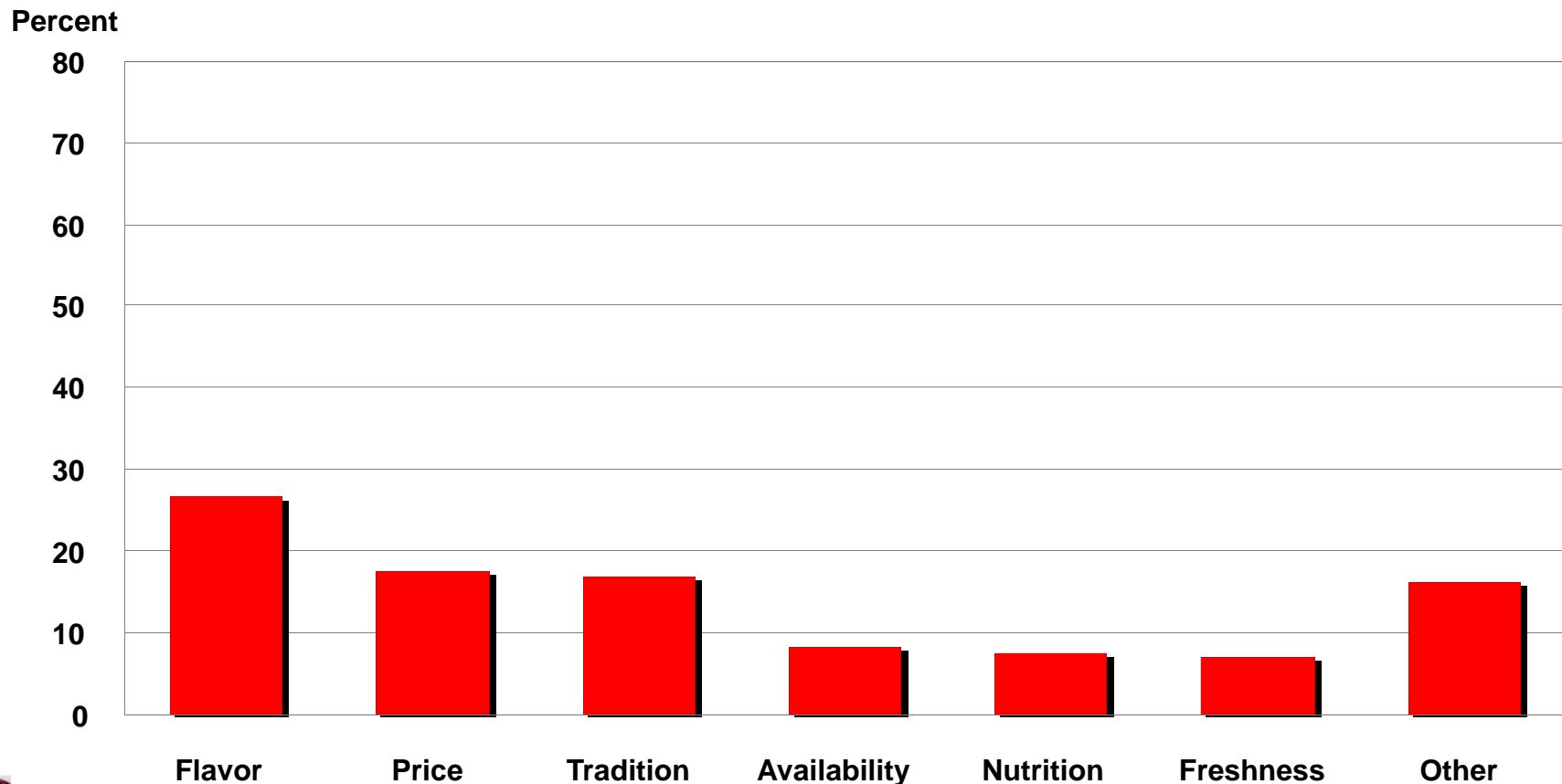
- Factors affecting their lamb purchases



WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Most important factor affecting purchases



WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Most Important Factor by Race/Ethnicity

Race/Ethnicity	Lamb Price	Other Meat Prices	Nutrition	Digestibility	Availability	Serving Size	Tradition	Special Occasions	Flavor	Other
	----- % -----									
W. European	75.0	41.7	25.0	8.3	41.7	16.7	16.7	0.0	58.3	33.3
E. European	36.4	0.0	36.4	18.2	36.4	0.0	54.5	54.5	72.7	18.2
Mid-Eastern	54.5	19.5	46.8	24.7	41.6	40.3	68.8	55.8	62.3	19.5
Hispanic	68.4	31.6	47.4	31.6	36.8	10.5	47.4	42.1	63.2	5.3
Afro-Amer.	47.4	26.3	68.4	52.6	42.1	21.1	52.6	57.9	84.2	10.5
Asian	48.1	29.6	48.1	22.2	48.1	7.4	59.3	37.0	66.7	33.3
Other	75.0	25.0	25.0	0.0	25.0	50.0	25.0	0.0	75.0	25.0

WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Most Important Factor by Religion

Religion	Lamb Price	Other Meat Prices	Nutrition	Digestibility	Availability	Serving Size	Tradition	Special Occasions	Flavor	Other
	----- % -----									
Christian	61.0	36.6	36.6	34.1	39.0	19.5	53.7	41.5	70.7	12.2
Muslim	53.7	22.0	54.9	31.7	47.6	32.9	68.3	63.4	67.1	17.1
Jewish	53.8	7.7	26.9	11.5	23.1	19.2	42.3	15.4	50.0	46.2
Asian	57.1	14.3	85.7	14.3	42.9	0.0	57.1	28.6	57.1	14.3
None	37.5	12.5	37.5	0.0	37.5	12.5	12.5	25.0	62.5	25.0
Other	50.0	50.0	50.0	0.0	50.0	33.3	50.0	16.7	100.0	16.7

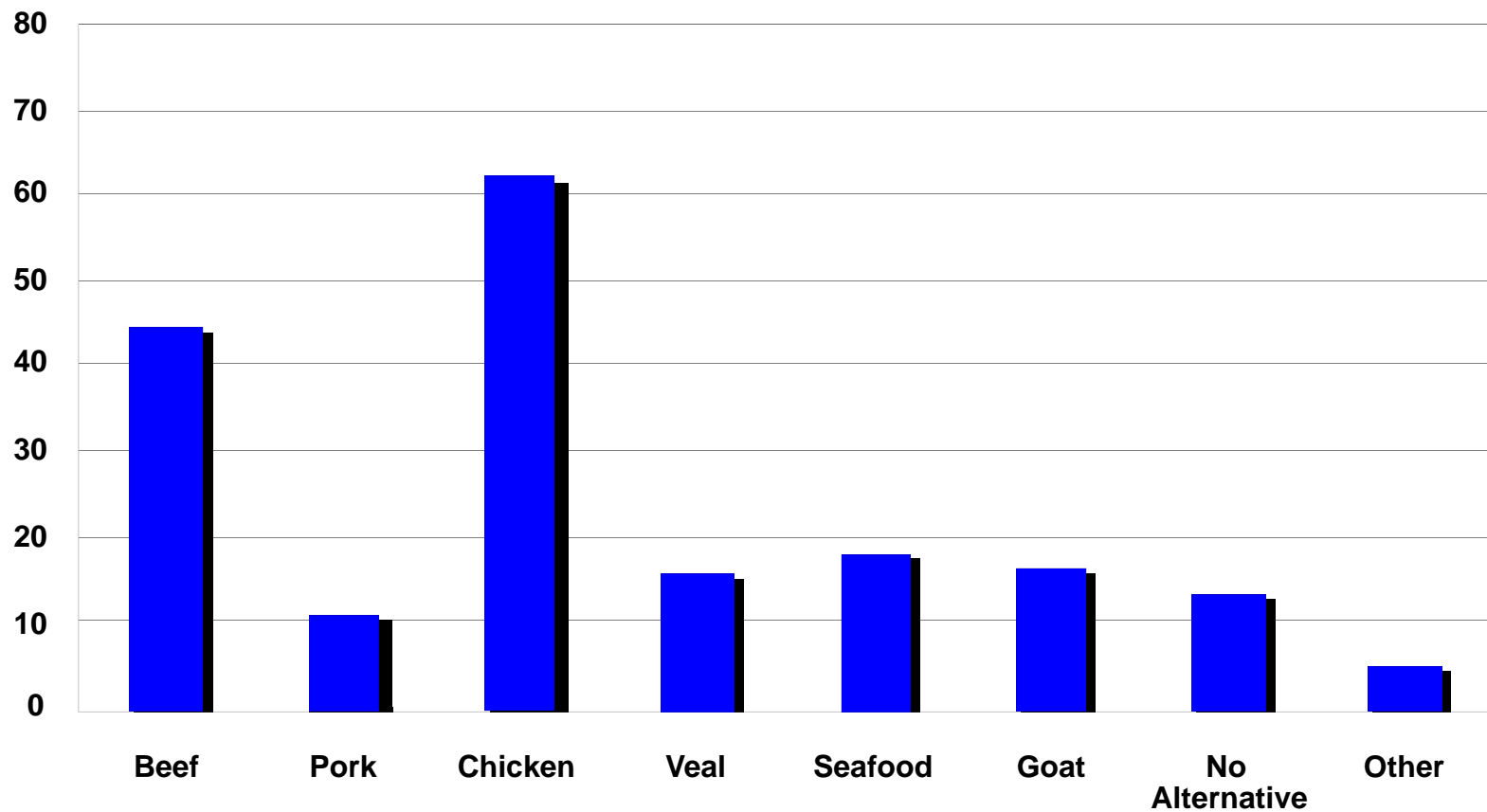


WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Meats considered to be substitutes for lamb

Percent



WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Lamb substitutes by Race/Ethnicity

Race/Ethnicity	Beef	Pork	Chicken	Veal	Seafood	Goat	Other
	----- % -----						
West European	75.0	25.0	41.7	8.3	0.0	25.0	33.3
East European	36.4	9.1	72.7	9.1	9.1	18.2	9.1
Middle Eastern	44.2	0.0	62.3	23.4	11.7	14.3	15.6
Hispanic	63.2	31.6	68.4	15.8	21.1	5.3	15.8
Afro-American	21.1	10.5	68.4	0.0	26.3	31.6	10.5
Asian	37.0	18.5	48.1	11.1	29.6	22.2	22.2
Other	50.0	25.0	100.0	0.0	0.0	25.0	25.0

WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Lamb substitutes by Religion

Religion	Beef	Pork	Chicken	Veal	Seafood	Goat	Other
	----- % -----						
Christian	53.7	31.7	51.2	12.2	17.1	17.1	14.6
Muslim	35.4	0.0	63.4	17.1	19.5	18.3	15.9
Jewish	57.7	3.8	69.2	23.1	3.8	15.4	38.5
Asian	28.6	28.6	28.6	0.0	42.9	14.3	14.3
None	50.0	12.5	75.0	12.5	0.0	25.0	0.0
Other	50.0	16.7	83.3	0.0	0.0	16.7	0.0

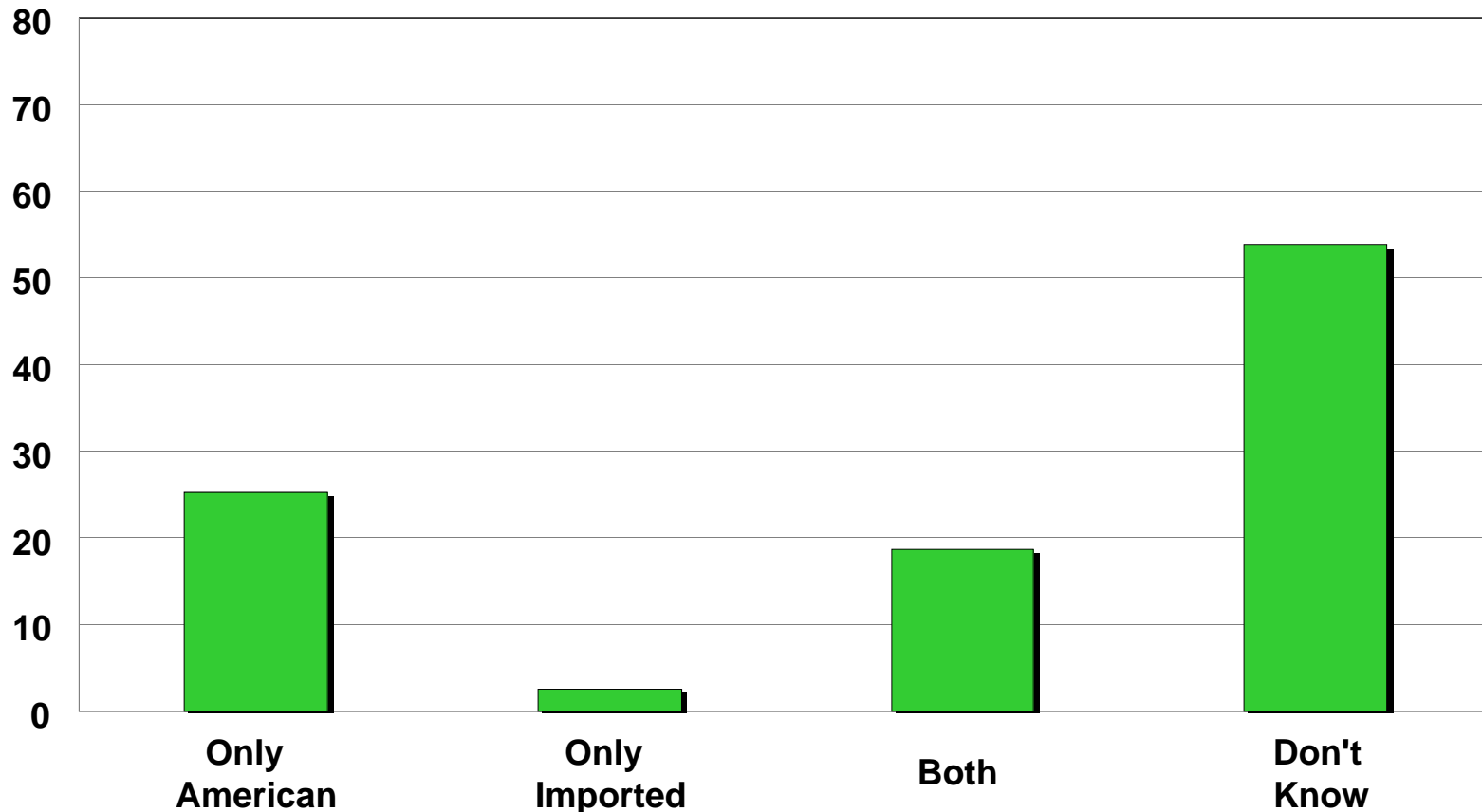


WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Do you buy **AMERICAN** or **IMPORTED** lamb?

Percent



WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- WHY do you buy **AMERICAN** lamb?
 1. “Fresh/not frozen” (33%)
 2. “Available” (17%)
 3. “Taste” (14%)
 4. “Halal/kosher” (6%), “Good quality” (6%)
- WHY do you buy **IMPORTED** lamb?
 1. “Price” (17%)
 2. “Availability” (12%)
 3. “Good quality” (10%)
 4. “Good reputation” (7%), “Organic” (7%)

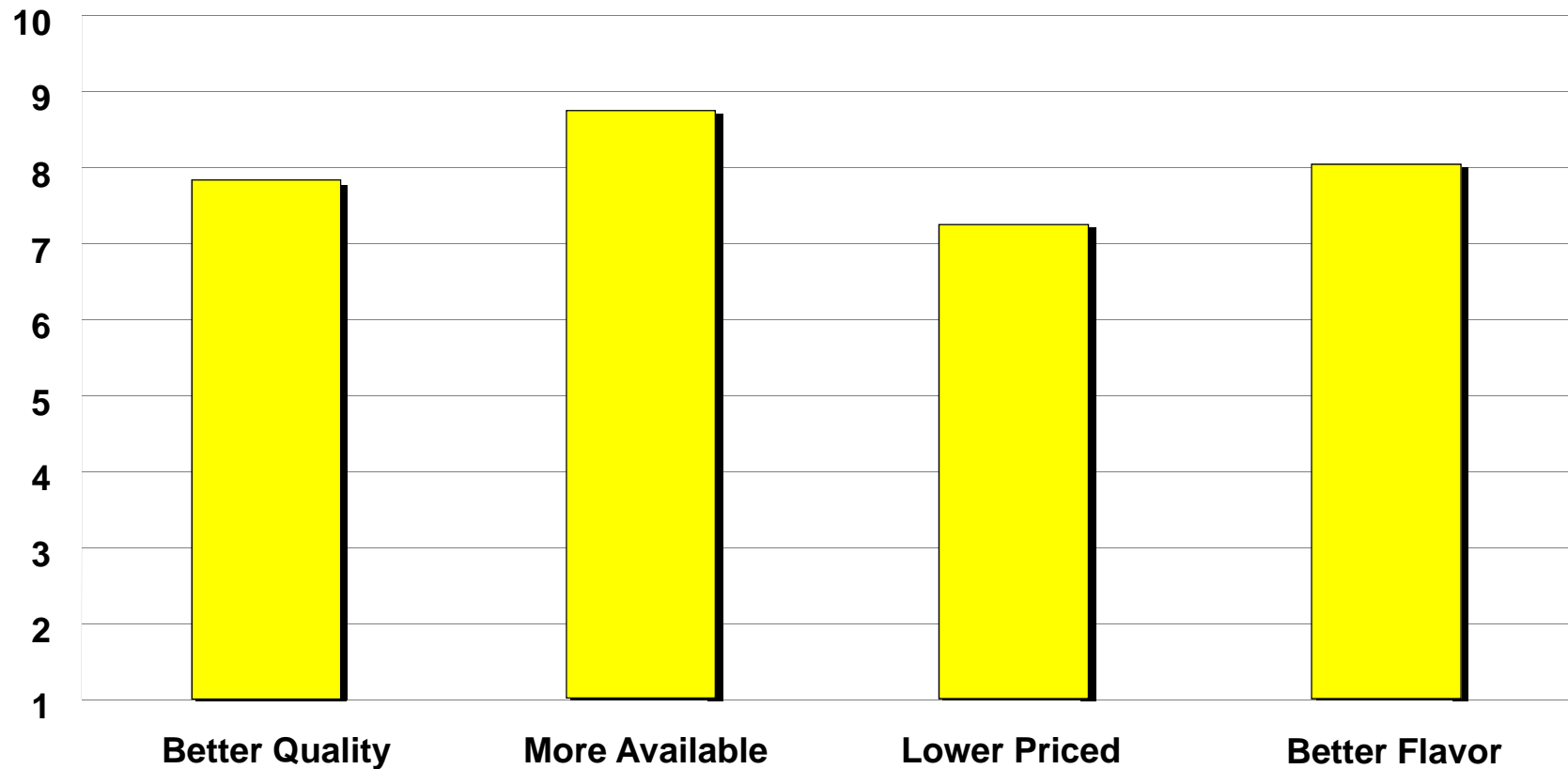


WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- **AMERICAN** compared to imported lamb is ...

Ave. Score (scale of 1 to 10)

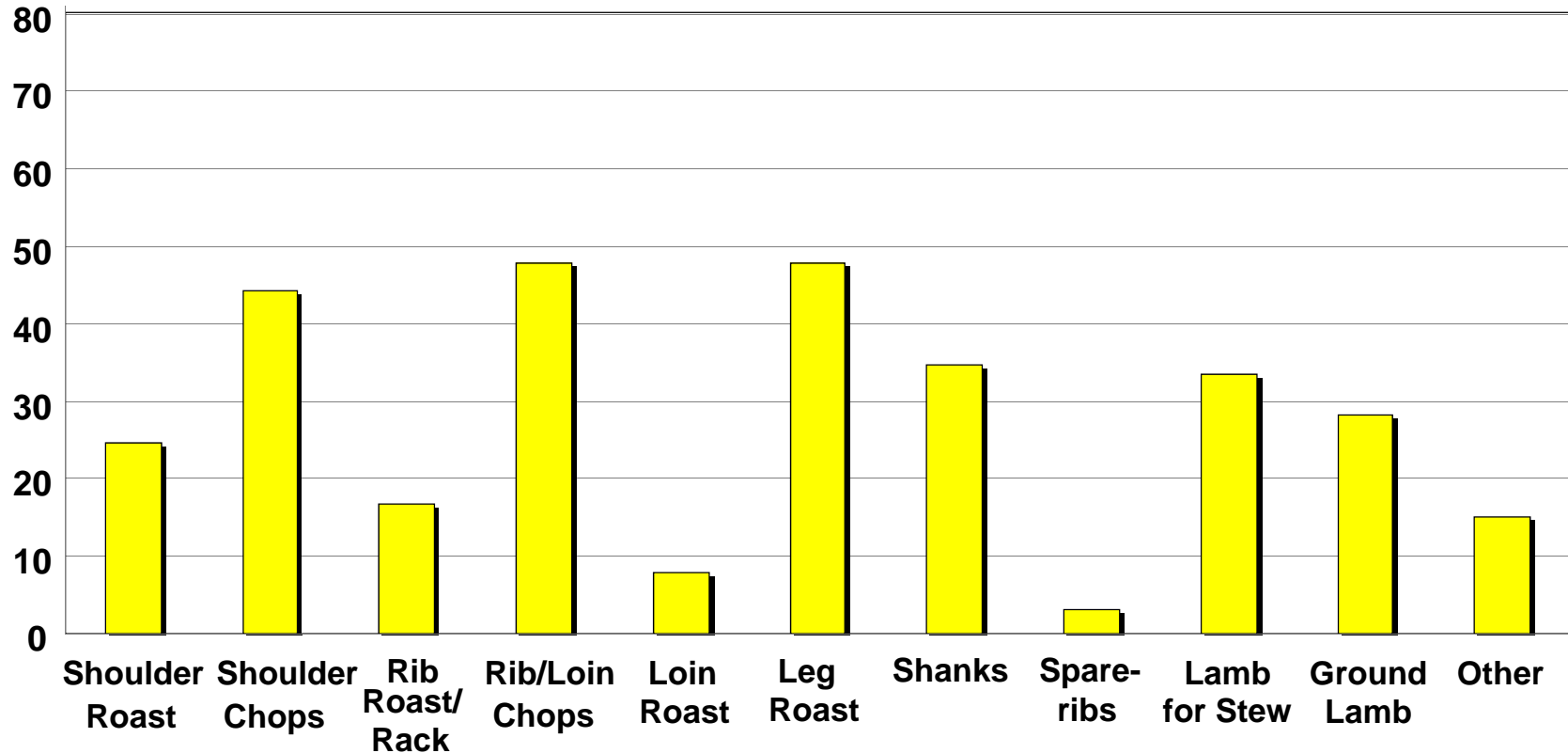


WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Cuts of lamb normally purchased

Percent



WHAT WE FOUND

Lamb Consumption Behavior & Preferences

- Problems in purchasing or preparing lamb:
 - » **“None” (57%)**
 - » **“Fat/cholesterol/healthiness of lamb” (7%)**
 - » **“Time required to purchase, prepare, or cook lamb” (7%)**
 - » **“Smell/flavor” (4%)**
 - » **“Lack of preparation instructions” (3%)**
 - » **“Price” (2%)**
 - » **“Age” or “Freshness” (2%)**
 - » **“Selection” or “Availability” (2%)**
 - » **“Quality” (2%)**
 - » **“Bones” (2%)**
 - » **“Imported lamb” (1%)**
 - » **“Serving size” (1%)**



WHAT WE FOUND

Profiles of Ethnic Lamb Consumers

- Consume Lamb at Home at Least Weekly

Married male under age 50

Employed

Large household (4 or more)

Middle Eastern or Asian origins

Muslim or Jewish religion



- Eat Lamb at a Restaurant at Least Weekly

Married over age 50

Smaller household (3 or fewer members)

Household income of \$60,000/year or more

Middle Eastern or Asian origins

Muslim or Asian-origin religion



WHAT WE FOUND

Profiles of Ethnic Lamb Consumers

- Considers Beef to be a Substitute for Lamb

Married male under age 50
Household income over \$60,000
Western European or Hispanic
Jew or Christian

- Considers Chicken to be a Substitute for Lamb

Married female
Large household (more than 3 members)
Muslim or a Jew

- Considers Goat to be a Substitute for Lamb

Single, employed (part-time or at home) female
Smaller household (3 or fewer members)
Asian, Western European, African American



WHAT WE FOUND

Profiles of Ethnic Lamb Consumers

- Buys Only American Lamb

Married male less than 50 years old
Employed full-time
Household income at least \$60,000/year
High school or less
Middle Eastern or African American
Muslim



- Buys Only Imported Lamb

Single male over 50 years of age
At least some college education
Household income of less than \$60,000/year
East European, Jewish or Christian



WHAT IT MEANS FOR PROMOTION

Segmenting the Ethnic Lamb Market

- Segmenting: Dividing a market into different groups with similar product needs and preferences
- Market segmentation helps define target markets to tailor promotion programs based on their often widely differing customer needs and preferences



WHAT IT MEANS FOR PROMOTION

Segmenting the Ethnic Lamb Market

- Two major lamb market segments:
Lamb consumers and non-consumers
- Lamb consumers: two major sub-segments:
Ethnic consumers and everyone else
- This study shows that ethnic consumers
further subdivided into smaller segments
- Some may be prime targets for American
lamb promotion - and others not.



WHAT IT MEANS FOR PROMOTION

Segmenting Muslim Lamb Consumers

Quality Driven

Middle Eastern

- Lebanese
- Syrians
- Yemenis
- Palestinians
- Saudis
- Others



WHAT IT MEANS FOR PROMOTION

Segmenting Muslim Lamb Consumers

Price Driven

North African & African

- Somalis
- Ethiopians
- Nigerians
- Egyptians
- Others



WHAT IT MEANS FOR PROMOTION

Segmenting Muslim Lamb Consumers

*Quality First
& Price*

Eastern European

- Albanians
- Uzbekistanis
and others
- Turks
- Others



WHAT IT MEANS FOR PROMOTION

Segmenting Muslim Lamb Consumers

*Price First
& Quality*

Asian

- Indians
- Pakistanis
- Bangladeshis
- Malaysians
- Others



WHAT IT MEANS FOR PROMOTION

Segmenting Other Ethnic Lamb Markets

- Jewish and Western European lamb consumers
 - » Quality-First Segment



WHAT IT MEANS FOR PROMOTION

Segmenting Other Ethnic Lamb Markets

- Jewish and Western European lamb consumers
 - » Quality-First Segment
- Hispanic lamb consumers
 - » Price-Driven Segment



WHAT IT MEANS FOR PROMOTION

Implications for Promotion

- Tremendous opportunities to promote American lamb to the ethnic population of the country.
- The quality-driven and quality-first segments are the primary targets for ethnic promotion.
 - » Freshness
 - » Cleanness
 - » Smell
 - » Flavor
 - » Caring treatment of their animals by American sheep farmers
 - » Trust, confidence



WHAT IT MEANS FOR PROMOTION

Implications for Promotion

- Not all ethnic groups should be considered as primary targets for promotion.
 - » PRICE-DRIVEN segment (North Africans, and Hispanics) least likely to be persuaded by advertising featuring the quality of American lamb.
 - » PRICE-FIRST segment (Asians) has potential but price will always outweigh advertising on quality



WHAT IT MEANS FOR PROMOTION

How to Promote to Ethnic Consumers

- Spots on local Arabic, Russian TV and radio
- Media advertising not sufficient
- Develop relationships with local suppliers (such as Halal butchers, Arabic grocery stores and slaughterers)
- Educational materials - English, Arabic, Russian
- Halal slaughter and halal labels



WHAT IT MEANS FOR PROMOTION

How to Promote to Ethnic Consumers

- Spots on local Arabic, Russian TV and radio
- Media advertising not sufficient
- Develop relationships with local suppliers (such as Halal butchers, Arabic grocery stores and slaughterers)
- Educational materials - English, Arabic, Russian
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Our Goal Is To Support Your Efforts In Promoting American Lamb

Agribusiness, Food, and Consumer



Economics Research Center

**We Appreciate the Opportunity to be of
Service to ALB and the Lamb Industry**