REACHING MAINSTREAM AMERICAN CONSUMERS WITH GOAT MEAT

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INTRODUCTION

During the past few years, Florida A & M University and the University of Florida have cooperated in research to develop new products and find new markets for goat meat. The purpose of this paper is to present a brief overview of the marketing research that has been conducted to date, including a few tantalizing preliminary results of a major project that is nearing completion.

PREVIOUS MARKETING RESEARCH

During 1987, the Florida Agricultural Market Research Center (FAMRC) conducted two major trade surveys to determine the distribution of goat meat through traditional commercial marketing channels and to identify marketing problems and opportunities. One survey focused on meat buyers and merchandisers of supermarket chains, and the other on managers of meat wholesalers. All firms contacted were headquartered or conducting business in three areas with large ethnic populations, namely Dade, Broward and Hillsborough counties.

Executives of 17 retail food chains representing 622 individual stores were interviewed by telephone. Six of the smaller chains were found to be selling goat meat, but most did not carry it in all stores. Only 28 individual stores of the 622 controlled by the executives interviewed sold goat meat. These 28 stores sold an average of 40 pounds per week, approximately 2,000 pounds per year. Virtually all was purchased as frozen carcasses by the retailers.

Retailers that were not selling goat meat expressed little interest in carrying it in the future. In general, sellers and non-sellers alike exhibited little enthusiasm for the product. Low volumes, coupled with negative attitudes, seems to offer little hope for marketing large volumes of goat meat through retail stores in the short run (Locascio and Degner).

A second effort was directed toward meat wholesalers. A total of 164 wholesalers were interviewed, and 24 were found to be handling goat, 12 had quit, and 128 had never sold it. Total annual goat meat sales in the areas served by the 24 firms handling goat were estimated to be approximately 840,000 pounds. About half of their sales volume went to retail grocers, one-third to restaurants, and an additional 10 percent to varied foodservice operations such as ships, labor camps and jobbers that
also serve the foodservice trade. An estimated six percent was sold directly to individuals.

Most of the wholesalers bought frozen goat carcasses from out-of-state suppliers. Their weighted average purchase price was 95 cents per pound. The weighted average mark-up was 15 percent, resulting in a resale price of about $1.09 per pound.

It is likely that the Miami, Fort Lauderdale and Tampa areas have the highest goat meat consumption levels in the state. Even so, per capita consumption, as derived from wholesale sales, is still only 0.26 pounds (Degner and Locascio).

Both studies underscored the limited distribution and low volume sold through retail food stores. Additionally, many retailers and wholesalers displayed limited knowledge of goat meat. They also were generally of the opinion that consumer demand for goat was weak, outside of the ethnic markets. Thus, it appears very improbable that goat producers could expect broad based, enthusiastic market development assistance from food retailers or meat wholesalers.

CURRENT RESEARCH

The results of the two previous trade surveys indicated that the mainstream American market could probably be reached most efficiently through foodservice outlets, primarily restaurants. However, relatively little was known about consumer attitudes towards goat meat or about consumer evaluations of goat meat outside of laboratory settings or folklore. Several palatability studies comparing goat meat with beef, pork, lamb, and even horse had been conducted, but the standardized laboratory cooking methods (broiling, baking) used for all species appeared to put goat meat at a disadvantage (Smith, Pike and Carpenter; Smith, Carpenter and Shelton; Griffin, et al.).

The current research used a distinctly pragmatic approach. Focus groups were conducted to ascertain consumers' images of and attitudes toward goat meat and various types of restaurants which may be likely outlets for goat. The focus groups also provided valuable input for developing the subsequent questionnaire used in conjunction with a consumer evaluation of barbecued goat and beef products.

PROCEDURES

Focus Groups

Two focus groups were conducted, one in Tampa and one in Jacksonville, in May 1988. Nine persons participated in the former city and eleven in the latter. Participants were screened to include only those with family incomes of $25,000 or more, and those that had eaten in a full-service restaurant two or more times in the previous month. The
objective was to obtain moderately affluent consumers that patronize restaurants relatively often. Each focus group session was audio- and video-taped for subsequent analysis.

Consumer Evaluations

The consumer evaluations of goat meat were also conducted in Tampa and Jacksonville. Convenience samples of 300 consumers in each city were obtained in three major regional shopping malls. Individuals were screened to obtain those over 18 years of age, those that had eaten some form of barbecue within the past year, and those that had eaten in a full service restaurant at least once in the previous month.

After respondents had been qualified in the malls, they were taken to privacy booths located in market research firms' offices, where they were interviewed by trained professionals. Each participant received two one-ounce barbecue samples, one beef and the other goat. To avoid bias, participants were not told what kinds of barbecue they were sampling unless they were insistent. A very high proportion, 97 percent, did not know what kinds of meat they were served.

The beef samples were purchased directly from the stock of a barbecue restaurant. The samples were taken from whole bottom rounds which had been cooked for ten hours at 225°F. (107°C.). After cooking, the beef product was cut into cubes measuring approximately 0.5 inches per side. Noticeable exterior fat and gristle were removed from all samples.

The same restaurant also prepared the goat meat samples. The goat meat was obtained from ten Spanish goats with dressed carcass weights ranging from 17 to 39 pounds (7.7 to 17.7 kg.). The carcasses were frozen and stored at 5°F. (-15°C.) for approximately three months. They were thawed for 48 hours at about 38°F. (3°C.), cut into primalts, and cooked under commercial conditions at 225°F. (107°C.) for periods ranging from two to eight hours, depending on the thickness of the individual primalts. They were then deboned, trimmed of exterior gristle and fat, and cut into cubes measuring approximately 0.5 inch per side. Both the beef and the goat samples were then stored at 38°F. (3°C.) until needed, approximately two to four days.

The two barbecue samples were heated to serving temperature in microwave ovens in individual three-ounce plastic condiment cups immediately before being evaluated by respondents. No sauce was used during preparation or serving of the samples, but salt was available for respondents' use if desired. Samples were identified only as products "L" and "T," and the presentation order was rotated to minimize order bias. Only near the conclusion of the interview was the respondent told what types of meat had been served.
PRELIMINARY RESULTS

Focus Group Interviews

Respondents in both cities confirmed continuing shifts away from the consumption of red meats due to health concerns. Obviously, this has negative implications for goat meat, unless composition and nutrition studies currently underway discover advantages for goat. Some respondents perceived goat milk as being "healthy" and nutritious. They wondered if goat meat offered similar health benefits. Thus, it appears that some consumers' positive image of goat milk could carry over to meat. They also voiced concern about carcinogens related to smoking or barbecuing of meats.

The word "goat" conjures up negative images in many people's minds, and resistance to the idea of rating goat meat appears to be widespread. Part of this resistance is due to some people's association of goats to nursery rhymes, petting zoos, and to pets. Some even suggested that eating goats was similar to eating dogs, cats and horses. Other resistance stems from the other extreme, that goats are smelly scavengers and that the meat smells. Both focus groups contained male veterans of World War II, and both former soldiers voiced strong aversions to goat meat because they said they had been served unpalatable goat meat frequently during the War.

Almost everyone suggested calling the product something other than goat to avoid negative connotations. "Chevon" and "cabrito" were well received. Somewhat surprisingly, the negative connotations did not carry over to restaurants that (hypothetically) sold goat meat. Although there was some dissention, many participants described hypothetical restaurants serving goat meat as being upscale, trendy "yuppie" oriented establishments.

Product Evaluations

Preliminary analyses of the product evaluations are very encouraging. Although analyses of organoleptic evaluations have not been completed, a key variable termed "overall appeal" has been analyzed for beef and goat. Respondents were asked to rate overall appeal on a scale where 10 represented "excellent" and 0 "extremely poor." The mean (average) rating for beef was 5.66, and 5.68 for goat. The standard deviation, a measure of variability of the ratings, was virtually the same for both products, 2.43 for beef and 2.41 for goat. While the difference between the "overall appeal" ratings is not statistically significant, the results demonstrate that goat is not necessarily an inferior product! Examination of individual ratings shows that 41.9 percent of the sample of 599 usable observations expressed a preference for the goat, 20.0 percent gave the two products identical evaluations, and 38.1 percent preferred beef (Table 1).

Participants were also asked whether or not they would buy each of the products in a restaurant or in a food store. Again, the goat product
Table 1.--Consumers' preferences for goat vs. beef.

<table>
<thead>
<tr>
<th>Preference</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred goat</td>
<td>251</td>
<td>41.9</td>
</tr>
<tr>
<td>Liked equally</td>
<td>120</td>
<td>20.0</td>
</tr>
<tr>
<td>Preferred beef</td>
<td>228</td>
<td>38.1</td>
</tr>
<tr>
<td>Totals</td>
<td>599</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: survey data

Table 2.--Willingness to buy the beef and goat products in a restaurant.

<table>
<thead>
<tr>
<th>Response</th>
<th>Beef</th>
<th>Goat</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Number)</td>
<td>(Percent)</td>
</tr>
<tr>
<td>Yes, would buy</td>
<td>282</td>
<td>47.1</td>
</tr>
<tr>
<td>No, would not buy</td>
<td>283</td>
<td>47.2</td>
</tr>
<tr>
<td>Unsure</td>
<td>34</td>
<td>5.7</td>
</tr>
<tr>
<td>Totals(^a)</td>
<td>399</td>
<td>100.0</td>
</tr>
</tbody>
</table>

\(^a\)Percentage does not sum to 100.0 due to rounding.

Source: survey data

Table 3.--Willingness to buy the beef and goat products in a food store.

<table>
<thead>
<tr>
<th>Response</th>
<th>Beef</th>
<th>Goat</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Number)</td>
<td>(Percent)</td>
</tr>
<tr>
<td>Yes, would buy</td>
<td>374</td>
<td>62.4</td>
</tr>
<tr>
<td>No, would not buy</td>
<td>190</td>
<td>33.0</td>
</tr>
<tr>
<td>Unsure</td>
<td>27</td>
<td>4.5</td>
</tr>
<tr>
<td>Totals(^a)</td>
<td>599</td>
<td>100.0</td>
</tr>
</tbody>
</table>

\(^a\)Percentage does not sum to 100.0 due to rounding.

Source: survey data
compared quite favorably. About 47 percent said they would order the beef product in a restaurant, compared with about 51 percent for goat (Table 2). Approximately 62 percent said they would buy the beef product in a food store, and a slightly larger percentage, 64 percent, said they would buy the goat (Table 3).

CONCLUSIONS

The marketing research conducted to date indicates that market development for goat meat faces an uphill battle. Food retailers and meat wholesalers, in general, are pessimistic about convincing the mainstream American consumer to try and buy goat meat. Availability of the product is quite limited, even in geographic areas where large ethnic groups familiar with goat meat are located.

The consumer acceptance work underway, however, indicates that goat meat can compete quite favorably with beef, if prepared properly. While a barbecued product may not be the final solution, it does demonstrate that goat can be a serious competitor. These preliminary results add credence to the idea of promoting "chevon" or "cabrito" as a specialty menu item in trendy, upscale restaurants. Introducing the product to mainstream American consumers through "chic" outlets is an essential first step in gaining widespread acceptance. Perhaps these results can be used to persuade such restaurants to offer the product and initiate needed market development.
REFERENCES


