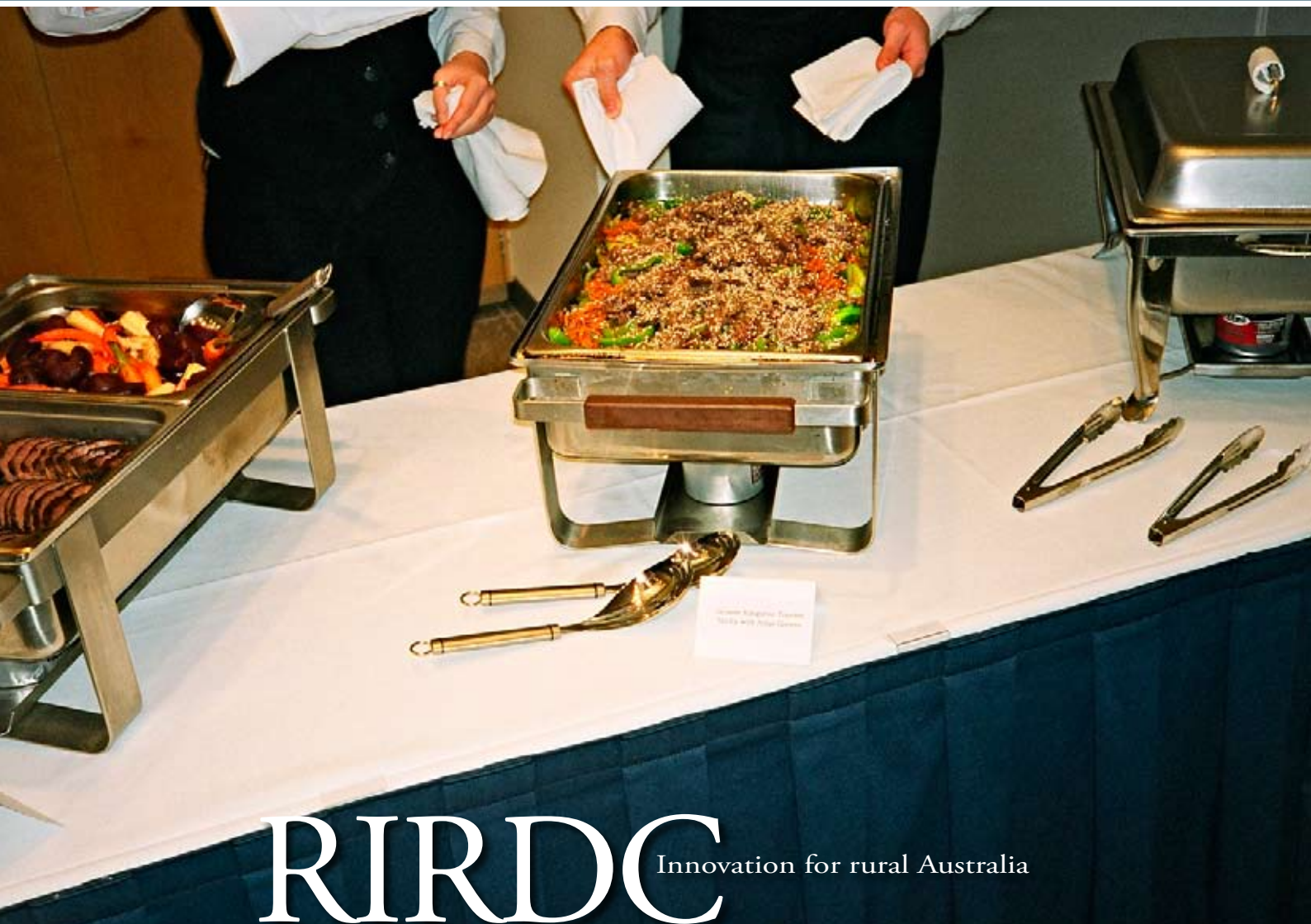




Australian Government
**Rural Industries Research and
Development Corporation**

Foodservice Attitudes towards Kangaroo Meat

RIRDC Publication No. 09/126



RIRDC Innovation for rural Australia



Australian Government

**Rural Industries Research and
Development Corporation**

Foodservice Attitudes towards Kangaroo Meat

By Mark Ellis

August 2009

RIRDC Publication No 09/126
RIRDC Project No. PRJ-000315

© 2009 Rural Industries Research and Development Corporation.
All rights reserved.

ISBN 1 74151 925 X
ISSN 1440-6845

Foodservice Attitudes towards Kangaroo Meat
Publication No. 09/126
Project No. PRJ-000315

The information contained in this publication is intended for general use to assist public knowledge and discussion and to help improve the development of sustainable regions. You must not rely on any information contained in this publication without taking specialist advice relevant to your particular circumstances.

While reasonable care has been taken in preparing this publication to ensure that information is true and correct, the Commonwealth of Australia gives no assurance as to the accuracy of any information in this publication.

The Commonwealth of Australia, the Rural Industries Research and Development Corporation (RIRDC), the authors or contributors expressly disclaim, to the maximum extent permitted by law, all responsibility and liability to any person, arising directly or indirectly from any act or omission, or for any consequences of any such act or omission, made in reliance on the contents of this publication, whether or not caused by any negligence on the part of the Commonwealth of Australia, RIRDC, the authors or contributors.

The Commonwealth of Australia does not necessarily endorse the views in this publication.

This publication is copyright. Apart from any use as permitted under the *Copyright Act 1968*, all other rights are reserved. However, wide dissemination is encouraged. Requests and inquiries concerning reproduction and rights should be addressed to the RIRDC Publications Manager on phone 02 6271 4165.

Researcher Contact Details

Mark Ellis
Sensory Solutions
1/185 Briens Road
Northmead, NSW, 2152, Australia

Phone: +61 2 9873 8900
Fax: +61 2 9894 2218
Email: m.ellis@sensorysol.com.au

In submitting this report, the researcher has agreed to RIRDC publishing this material in its edited form.

RIRDC Contact Details

Rural Industries Research and Development Corporation
Level 2, 15 National Circuit
BARTON ACT 2600

PO Box 4776
KINGSTON ACT 2604

Phone: 02 6271 4100
Fax: 02 6271 4199
Email: rirdc@rirdc.gov.au.
Web: <http://www.rirdc.gov.au>

Electronically published by RIRDC in August 2009
Print-on-demand by Union Offset Printing, Canberra at www.rirdc.gov.au
or phone 1300 634 313

Foreword

This report provides an account of Foodservice professionals' attitudes towards kangaroo meat, in addition to their perceptions of what their customers think of Kangaroo meat.

The meat industry is one of the largest in Australia. Key competitors include beef, lamb, pork and game meats. Kangaroo meat is a healthy, nutritional, cost effective and healthy substitute for other red meats. Being a quality meat with a high profit margin for foodservice operators, Kangaroo meat has lot of growth potential as an industry.

Currently, kangaroo meat marketing is suffering from lack of information to make the best Return on Investment decisions to market to the foodservice sector. The foodservice industry is the key driver of total consumption, however kangaroo holds less than 1% of the total sales in foodservice. If the general public see kangaroo appearing on menus, experience the product and enjoy it, they are more likely to purchase it for home consumption.

This research aims to address this lack of information and give the key stakeholders guidance on how to market to the foodservice sector. The report is targeted to the Kangaroo Industry Association of Australia (KIAA), kangaroo processors and meat product manufacturers. Overall it is clear that both customers and chefs need to be better informed about kangaroo meat in order to increase the usage of Kangaroo meat in the foodservice sector.

This report, an addition to RIRDC's diverse range of over 1900 research publications, forms part of our New Animals R&D program, which aims to accelerate the development of viable new animal industries.

Most of RIRDC's publications are available for viewing, downloading or purchasing online at www.rirdc.gov.au. Purchases can also be made by phoning 1300 634 313.

Peter O'Brien
Managing Director
Rural Industries Research and Development Corporation

Contents

- Foreword ii
- Executive Summary..... vi
- 1. Introduction 1**
- 2. Objectives 2**
 - 2.1 Business and Marketing Objectives:.....2
 - 2.2 Research objectives.....2
- 3. Methodology..... 3**
- 4. Results/key findings..... 4**
 - 4.1 Current cooking practices4
 - 4.2 Information sources5
 - 4.3 Chefs’ ideals on kangaroo meat and customers perceptions.....9
 - 4.4 Restaurants currently serving kangaroo13
 - 4.5 Restaurants currently not serving Kangaroo.....19
- Appendix 23**
 - Project Questionnaire.....23

List of Figures

- Figure 1: Types of meat currently used in the foodservice industry (N=209) 4
- Figure 2: Cooking style of the chefs (N=209) 4
- Figure 3: Menu selection of the outlet (N=209)..... 5
- Figures 4 and 5: Use of specials boards (N=209 and 135 respectively)..... 5
- Figure 6: Information sources used to find recipes, suppliers, ingredients and similar (N=209) 6
- Figure 7: Information sources used most often (N=209) 6
- Figure 8: Purpose of accessing online resources (N=29) 7
- Figure 9: Which magazines do the chefs read? (N=123) 7
- Figure 10: Which magazine was considered the best by respondents (N= 123) 8
- Figure 11: Sections of magazines read (N=123) 8
- Figure 12: Percentage of chefs which receive advice form meat distributers (N=56)..... 9
- Figure 13: Chefs’ attitudes regarding kangaroo meat (N=209)..... 10
- Figure 13: Chef’s attitudes regarding kangaroo meat continued (N=209) 10
- Figure 14: Percentage of Chef’s personally eating kangaroo meat (N=209) 11
- Figure 15: Expect to pay for prime kangaroo cut compared to other meats (N=209)..... 11
- Figure 16: Chefs beliefs about consumer perceptions (N=209) 12
- Figure 17: Percent of customers who order entrées, as indicate by chefs (N=209) 12
- Figure 18: Chefs’ opinion on whether it would be easier to get customers to try kangaroo as an entrée (N=209) 13
- Figure 19: Number of kangaroo dishes offered by restaurants (n=35) 13
- Figure 20: Percentage of restaurants which sell kangaroo as special or regular dishes (N=35)..... 14
- Figure 21: Types of kangaroo cuts currently purchased by restaurants (N=35) 14
- Figure 22: Where restaurants purchase kangaroo meat from (N=35) 15
- Figure 23: Why customers order kangaroo in restaurants (N=35) 15
- Figure 24: Reasons customers order kangaroo in mainstream and upper-class restaurants (N=35)..... 16
- Figure 25: Recommended improvements to kangaroo by chefs to increase customer purchase and consumption (N=35)..... 16
- Figure 26: Recommended improvements to kangaroo by chefs to increase customer purchase and consumption which will have the biggest impact (N=35) 17
- Figure 27: Recommended improvements to kangaroo by chefs to increase customer purchase and consumption which will have the biggest impact mainstream and upper-class restaurants (N=35) .. 17
- Figure 28: Recommended improvements to kangaroo by chefs to increase customer purchase and consumption mainstream and upper-class restaurants (N=35) 18
- Figure 29: How easy chefs find cooking kangaroo (n=35) 18
- Figure 30: Would customers order kangaroo if it were on the menu (N=174) 19
- Figure 31: Reasons for not serving kangaroo (N=174)..... 19
- Figure 32: Reasons for not serving kangaroo meat by restaurant type (N=174)..... 20
- Figure 33: Improvements needed to use kangaroo meat (N=174) 20
- Figure 34: Improvements needed to se kangaroo meat by restaurant (N=174)..... 21
- Figure 35: Improvement with the biggest impact (N=174)..... 21
- Figure 36: Improvement with the biggest impact by restaurant type (174) 22

Executive Summary

What the report is about

This report was commissioned by Rural Industries Research and Development Corporation (RIRDC) to conduct research on perceptions of foodservice operators regarding kangaroo meat. By understanding the barriers to purchasing, cooking and menu placement of kangaroo meat, insights can be provided to enable relevant information to assist in marketing this unique Australian product.

Who is the report targeted at?

The report is directed to the human domestic consumption sector of kangaroo meat. Currently, kangaroo meat marketing is suffering from lack of information to make the best Return in Investment decisions to market to the foodservice sector. The foodservice industry is the key driver of total consumption; however kangaroo holds less than 1% of the total sales in foodservice. If the general public see kangaroo appearing on menus, experience the product and enjoy it, they are more likely to purchase for home consumption.

Background

The meat industry is one of the largest in Australia. Key competitors include beef, lamb, pork and game meats. Kangaroo meat is a nutritional cost effective and healthy substitute for other red meats. Being a quality meat with a high profit margin for foodservice operators, Kangaroo meat has lot of growth potential as an industry.

Aims/objectives

The main aims and objectives of the study are to

- Research foodservice decision makers in the mainstream (and fine dining) restaurant, hotels and clubs trade to establish barriers and opportunities to be addressed in marketing to this sector.
- Gain an understanding from chefs on attitudes, menu selection, barriers to serving kangaroo, and information needed to aid placement of kangaroo on the menu.

Methods used

An online interviewing methodology was adopted for this study in order to maximise the number of interviews that could be achieved and to provide a flexible format for the Foodservice professionals to take part.

The target market for the study was defined as:

- N=200 chefs and foodservice decision makers (meat purchasing).
- Restaurants (mainstream and fine dining), Hotels, Clubs.

The scope was across Sydney, Melbourne and Brisbane metropolitan areas

Results/key findings

Kangaroo is cooked by 17% of the chefs surveyed, which is much less often than they cook more mainstream meats. However, kangaroo is the most frequently cooked of all the game meats.

The most common source of information used by chefs are magazines, therefore this would be a potential target for changing attitudes and providing information about kangaroo products. Chefs' top four "most read magazines" are Delicious, Gourmet Traveller, Superfood Ideas and Australian Good Taste. Magazine sections worth targeting would be the recipes and article sections, which are read most often.

Restaurants currently serving kangaroo offer 1 or 2 regular dishes, and tend to buy kangaroo meat from their normal distributor. They believe customers order kangaroo as something new and different rather than for health or taste reasons. To use more kangaroo, these chefs require greater public acceptance (most important) and more recipe ideas.

Restaurants not currently serving kangaroo do so because of a lack of recipe ideas and because of customers failing to order it. These chefs also feel that customers need to be educated to order it (most important), and they themselves need more information on how to use it.

Implications for relevant stakeholders

The results of this study has implications for the whole of Kangaroo meat industry and will give some guidance on how to generate more interest for Kangaroo meat within the foodservice sector.

Recommendations

Both customers and chefs need to be better informed about kangaroo meat in order to increase the usage of Kangaroo meat in the foodservice sector.

1. Introduction

The meat industry is one of the largest in Australia. Key competitors include beef, lamb, pork and game meats. Kangaroo meat is a healthy, nutritional product, cost effective and healthy substitute for other red meats. Being a quality meat with a high profit margin for foodservice operators Kangaroo meat has lot of growth potential as an industry.

Currently, kangaroo meat marketing is suffering from lack of information to make the best return on investment (ROI) decisions to market to the foodservice sector. The foodservice industry is the key driver of total consumption, however kangaroo holds less than 1% of the total sales in foodservice. If the general public see kangaroo appearing on menus, experience the product and enjoy it, they are more likely to purchase for home consumption.

Sensory Solutions was commissioned by Rural Industries Research and Development Corporation (RIRDC) to conduct research on perceptions of foodservice operators regarding kangaroo meat. By understanding the barriers to purchasing, cooking and menu placement of kangaroo meat, insights can be provided to enable relevant information to assist in marketing this unique Australian product.

2. Objectives

2.1 Business and Marketing Objectives:

- To aid development of the domestic market for kangaroo meat by diversifying the kangaroo consumption base.
- Provide insights into the goal of maximising industry returns by the objective of a strong domestic market as outlined in the Kangaroo Industry Strategic Plan (2005-2010)
- Inform chefs about the kangaroo industry and its products.
- Develop an improved image of the industry via increased communication within various industry publications.

2.2 Research objectives

- Research foodservice decision makers in the mainstream (and fine dining) restaurant, hotels and clubs trade to establish barriers and opportunities to be addressed in marketing to this sector.
- Gain an understanding from chefs on attitudes, menu selection, barriers to serving kangaroo, and information needed to aid placement of kangaroo on the menu.

3. Methodology

An online interviewing methodology was adopted for this study in order to maximise the number of interviews that could be achieved and to provide a flexible format for the Foodservice professionals to take part.

The target market for the study was defined as:

- N=200 chefs and foodservice decision makers (meat purchasing).
- Restaurants (mainstream and fine dining), Hotels, Clubs.
- A spread across Sydney, Melbourne and Brisbane metropolitan areas.

In total we interviewed 209 chefs/foodservice decision makers using an online questionnaire. The questionnaire was approximately 20 minute long and covered the following areas:

- General attitudes to food and cooking
- Attitudes and perceptions of kangaroo
- Usage of kangaroo meat
- Barriers to kangaroo meat use

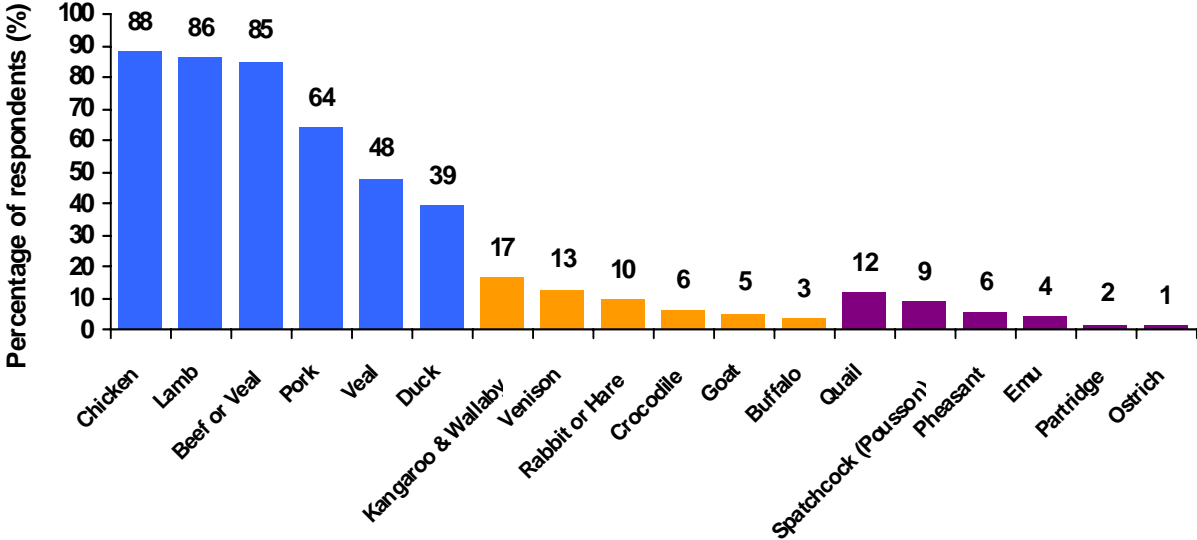
A copy of the questionnaire used can be found in the Appendix.

4. Results/key findings

4.1 Current cooking practices

To evaluate the current position of kangaroo in the meat industry consumers (chefs/food service decision makers) were asked to indicate which meats they currently cook. Results clearly show that kangaroo is cooked much less often than more mainstream meats like chicken and beef, however it is the most frequently cooked of all the game meats with the exception of duck (Figure 1).

Figure 1: Types of meat currently used in the foodservice industry (N=209)



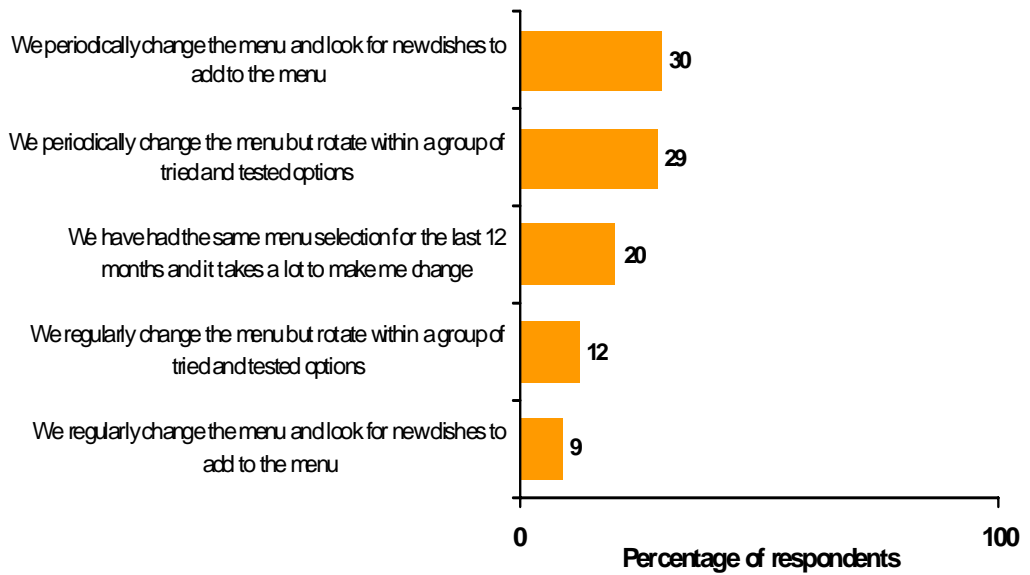
Although chefs seem not to be adventurous in the use of meats most say they are open to the idea of new ingredients and dishes (78%), with only 22% describing themselves as being conservative in their menu selections (Figure 2).

Figure 2: Cooking style of the chefs (N=209)



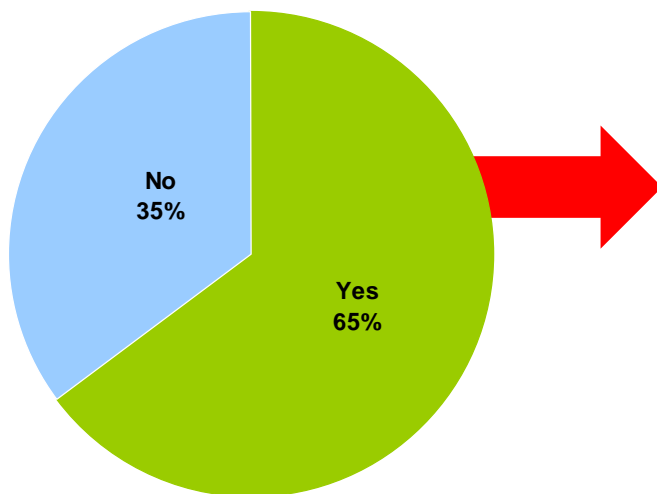
Few chefs describe themselves as conservative in their menu choice, however, only about 4 out of 10 claim to look for new dishes and the rest rotate amongst tried and tested dishes (Figure 3). Two thirds of chefs have a specials board, with dishes tending to stay on the board for 3 to 7 days (Figures 4 and 5).

Figure 3: Menu selection of the outlet (N=209)

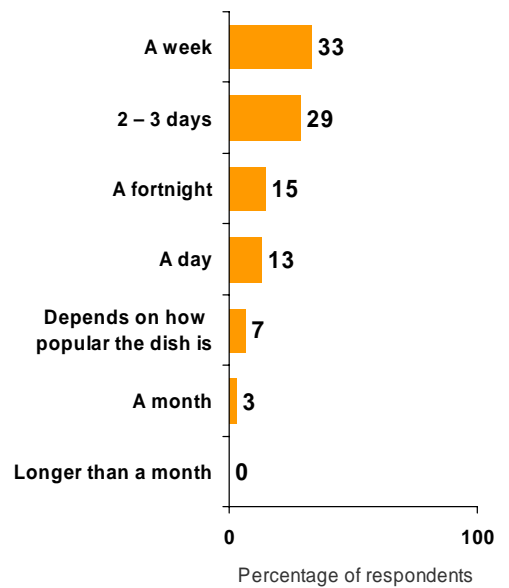


Figures 4 and 5: Use of specials boards (N=209 and 135 respectively)

Do you have a specials board?



How long will a dish stay on the board?

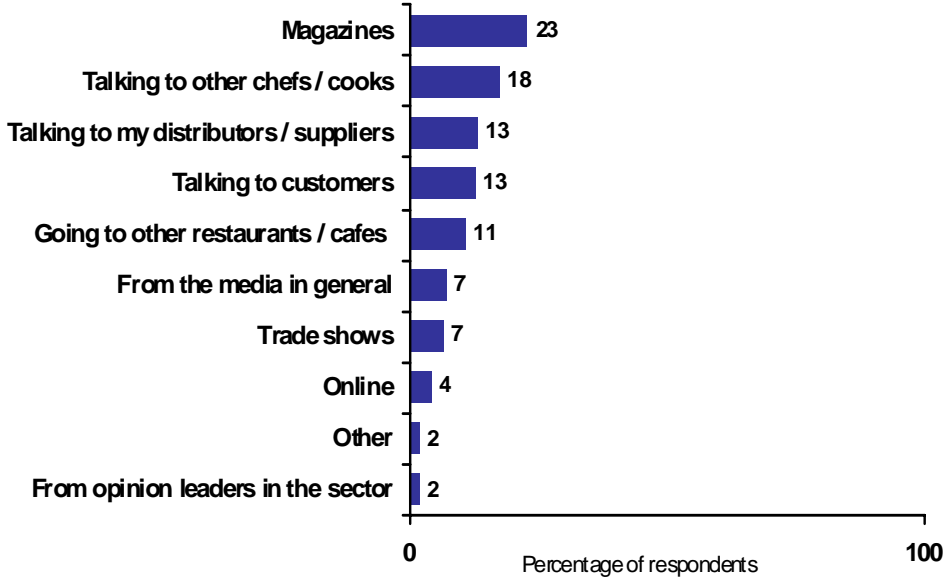
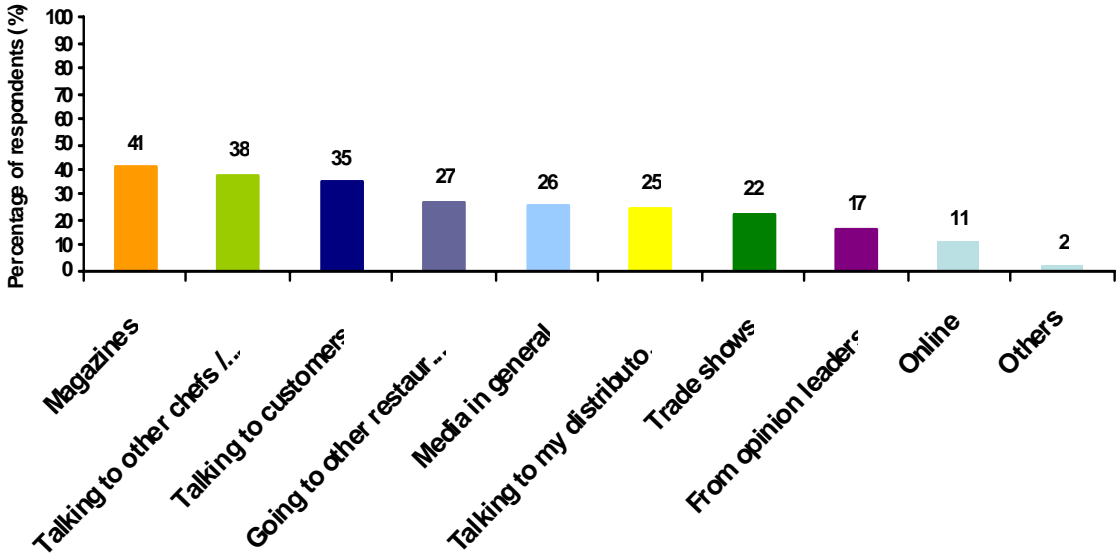


4.2 Information sources

The most common sources of information used by chefs are magazines and talking to customers and other chefs (Figure 6). These are two of the main information sources marketers should be targeting. Magazines are used regularly, and therefore could be the best option for marketing kangaroo meat amongst the target audience (Figure 7).

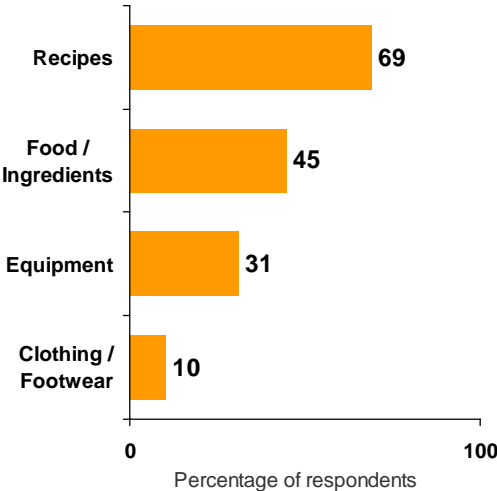
Figure 6: Information sources used to find recipes, suppliers, ingredients and similar (N=209)

Figure 7: Information sources used most often (N=209)



Online sources are not used frequently but when they are, it is primarily for recipes and ingredient information (Figure 8).

Figure 8: Purpose of accessing online resources (N=29)



“Delicious” magazine was rated the best and most often used magazine, with Gourmet Traveller close behind (Figure 9 and 10). Chefs are primarily reading both the recipe and article sections from these magazine sources (Figure 11). This would indicate that any push in magazines needs to be focussed to provide chefs with ideas and information on kangaroo dishes.

Figure 9: Which magazines do the chefs read? (N=123)

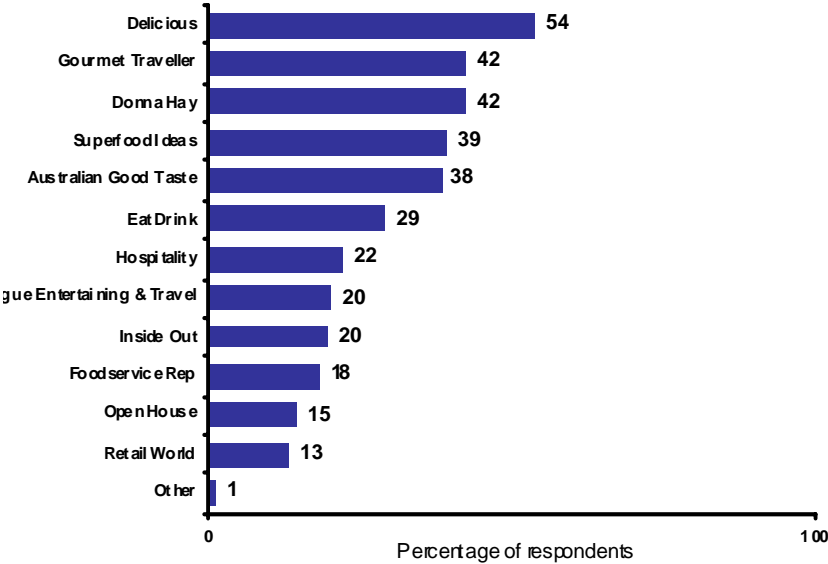


Figure 10: Which magazine was considered the best by respondents (N= 123)

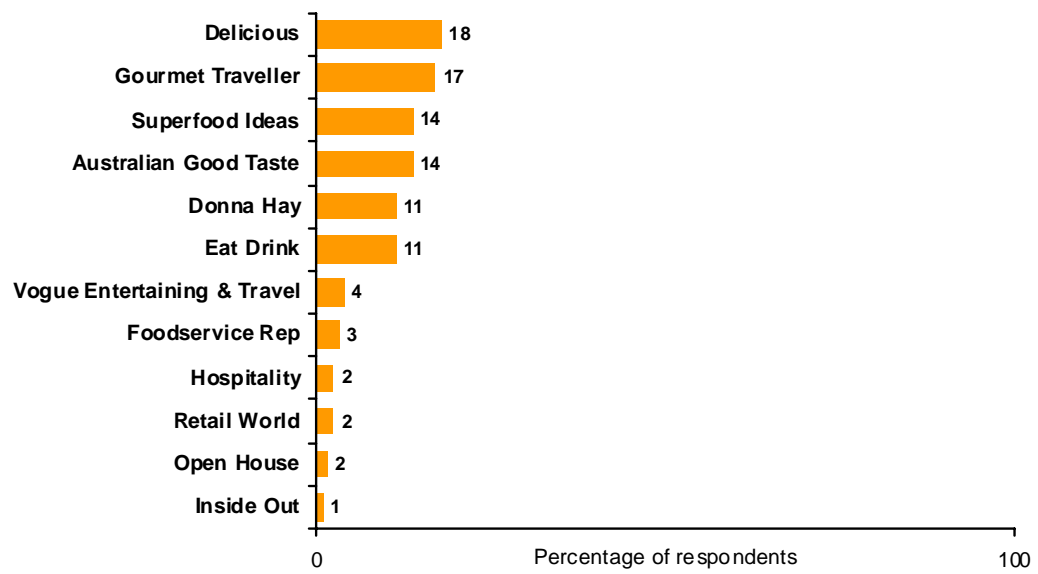


Figure 11: Sections of magazines read (N=123)

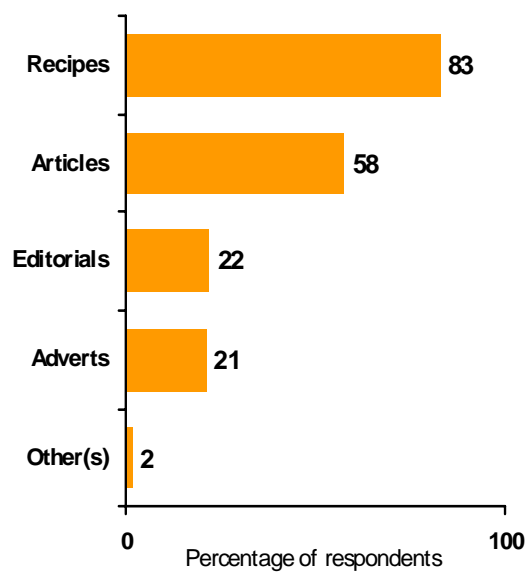
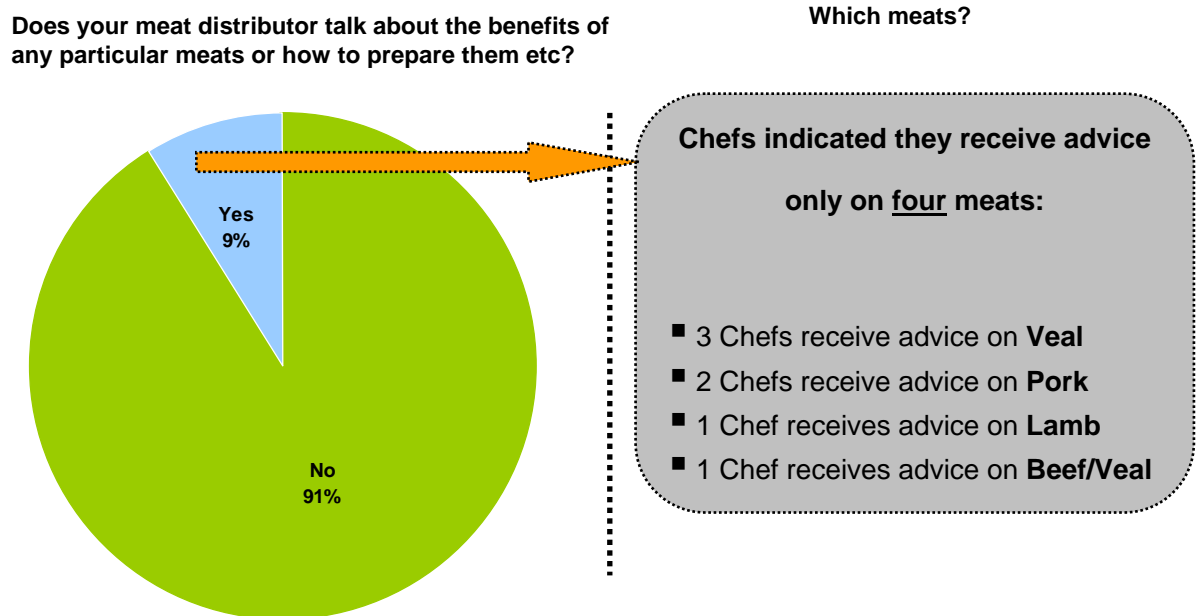


Figure 12 shows that 91% of respondents are not receiving specific advice or benefits about the meats they are buying from their meat distributors. Advice that is being sought does not include kangaroo. There is a potential opportunity for the kangaroo industry to educate suppliers and improve communication with their customers.

Figure 12: Percentage of chefs which receive advice form meat distributors (N=56)



4.3 Chefs' ideals on kangaroo meat and customers perceptions

Chefs believe that kangaroo is a healthy meat, but there is some debate over how easy is it to cook and how tough it is (Figure 13). A large proportion of chefs disagree that there are many kangaroo recipes, opening a potential avenue to give chefs more opportunities and ideas for using kangaroo meat.

Figure 13: Chefs' attitudes regarding kangaroo meat (N=209)

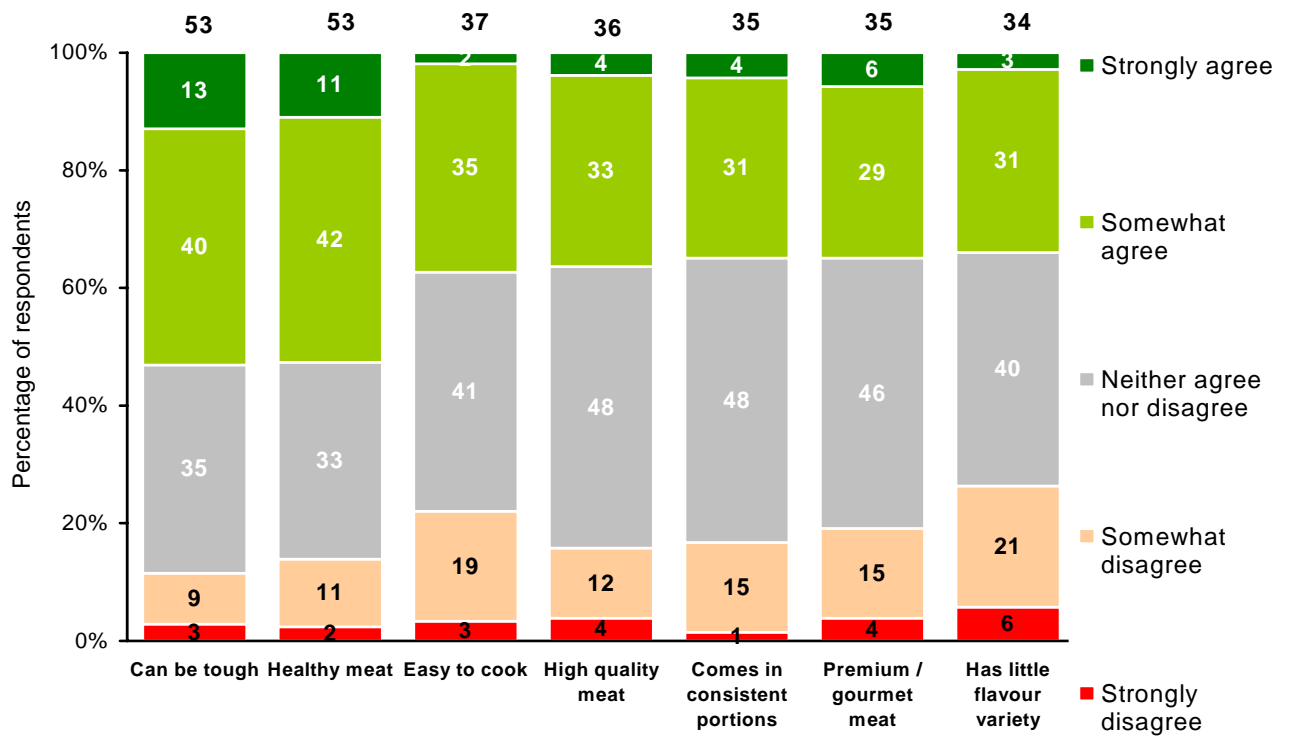


Figure 13: Chef's attitudes regarding kangaroo meat continued (N=209)

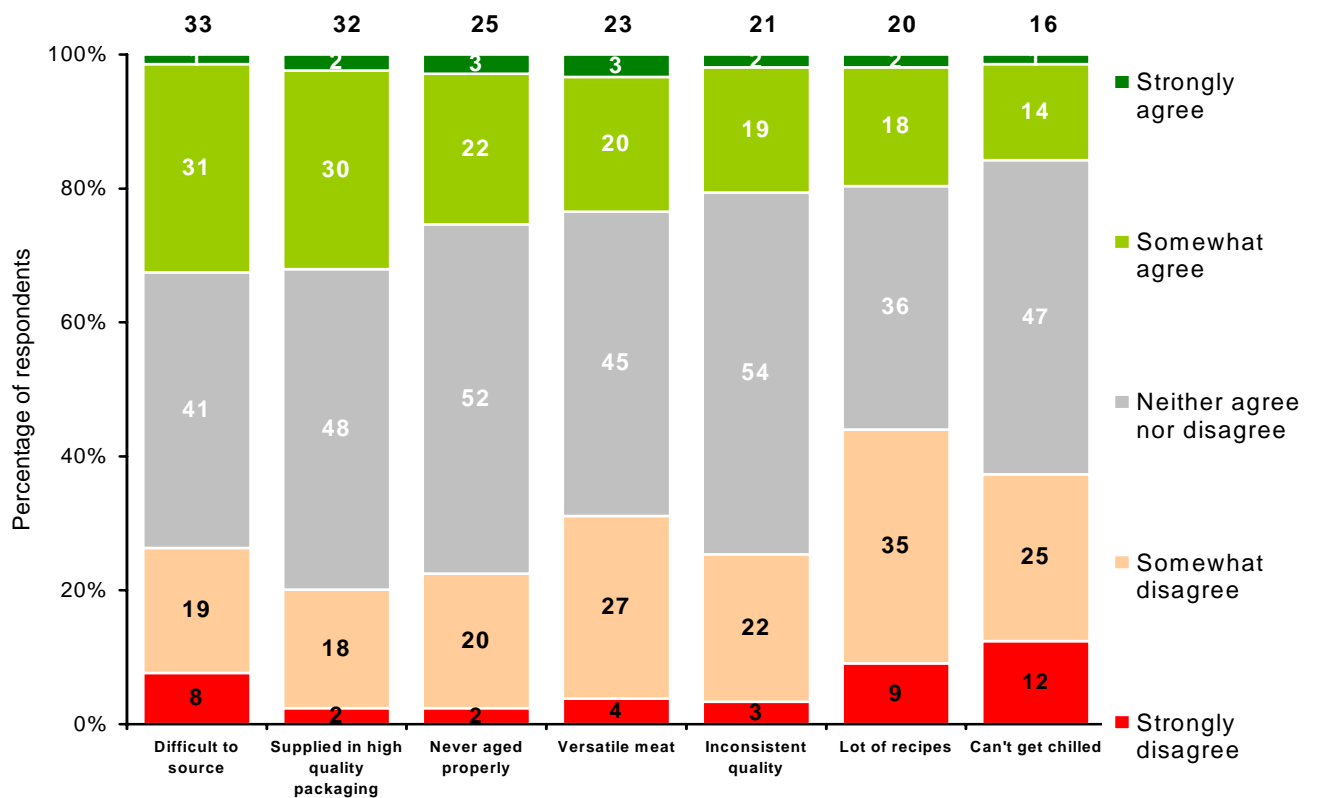


Figure 14 demonstrates a lack of trial within Foodservice professionals with 15% of chefs having never tried Kangaroo and very few eat it regularly (3%). Pricing expectations presented in Figure 15 for kangaroo were higher than chicken.

Figure 14: Percentage of Chef's personally eating kangaroo meat (N=209)

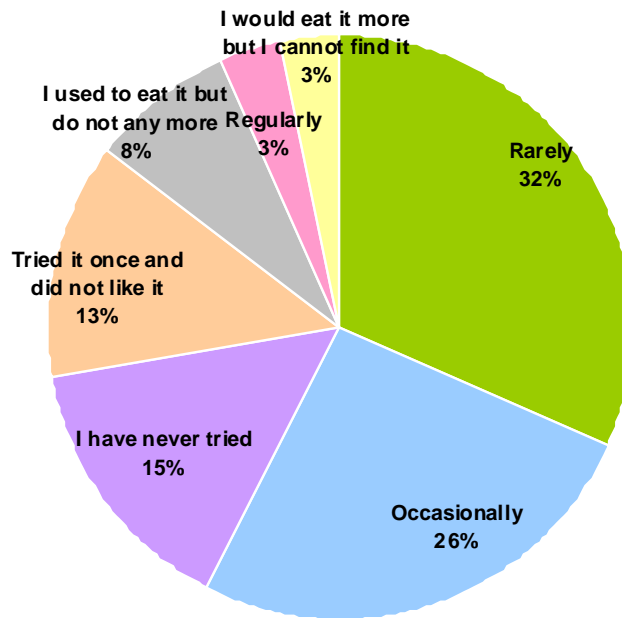
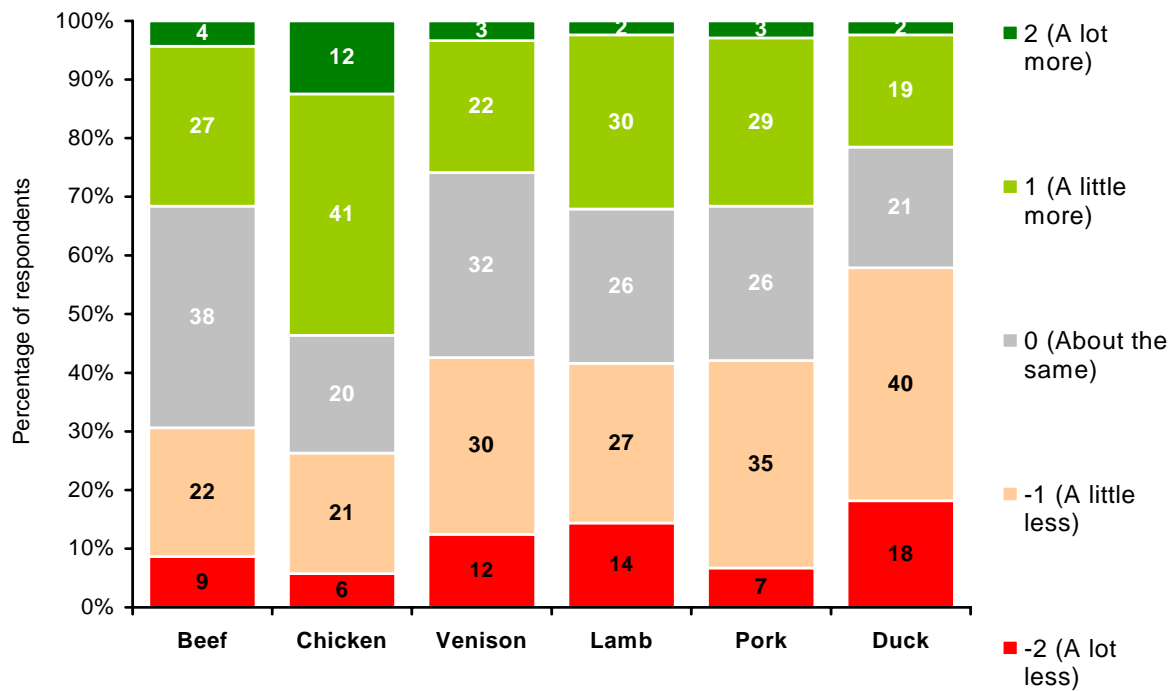
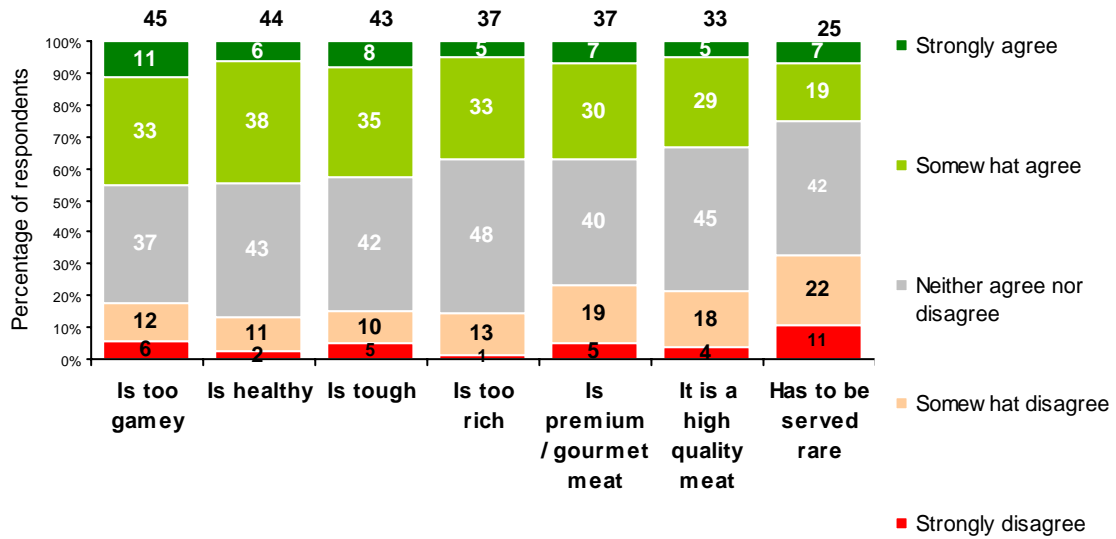


Figure 15: Expect to pay for prime kangaroo cut compared to other meats (N=209)



Overall chefs believe their customers feel kangaroo is too rich and gamey although it is widely thought to be healthy (Figure 16). Although there are high levels of chefs claiming they are unsure of consumers' perceptions, as demonstrated by the high levels of "Neither agree nor disagree" ratings.

Figure 16: Chefs beliefs about consumer perceptions (N=209)



Introducing kangaroo to customers as an entrée may have no effect, despite 42% of customers currently ordering entrées (Figure 17). Most chefs feel that offering kangaroo in this form would not necessarily encourage customers to try the meat as a main (Figure 18).

Figure 17: Percent of customers who order entrées, as indicate by chefs (N=209)

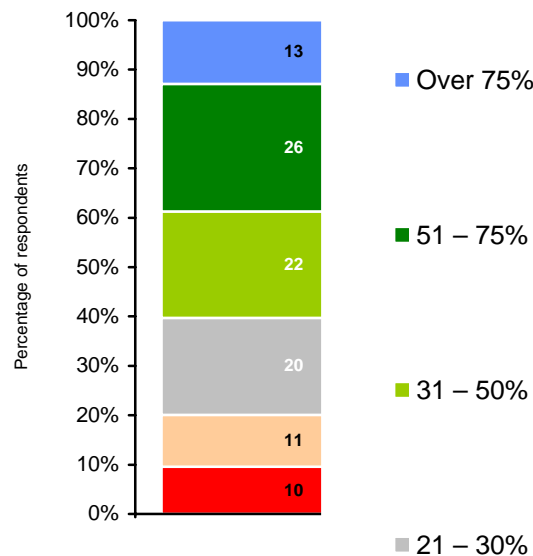
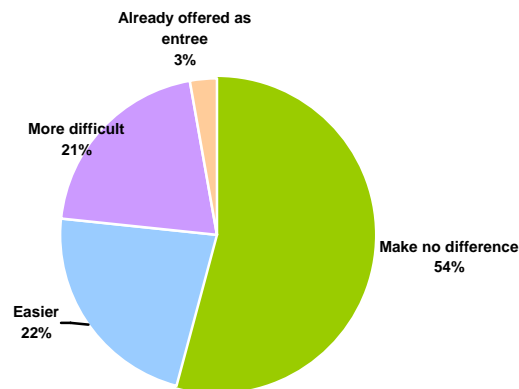


Figure 18: Chefs' opinion on whether it would be easier to get customers to try kangaroo as an entrée (N=209)

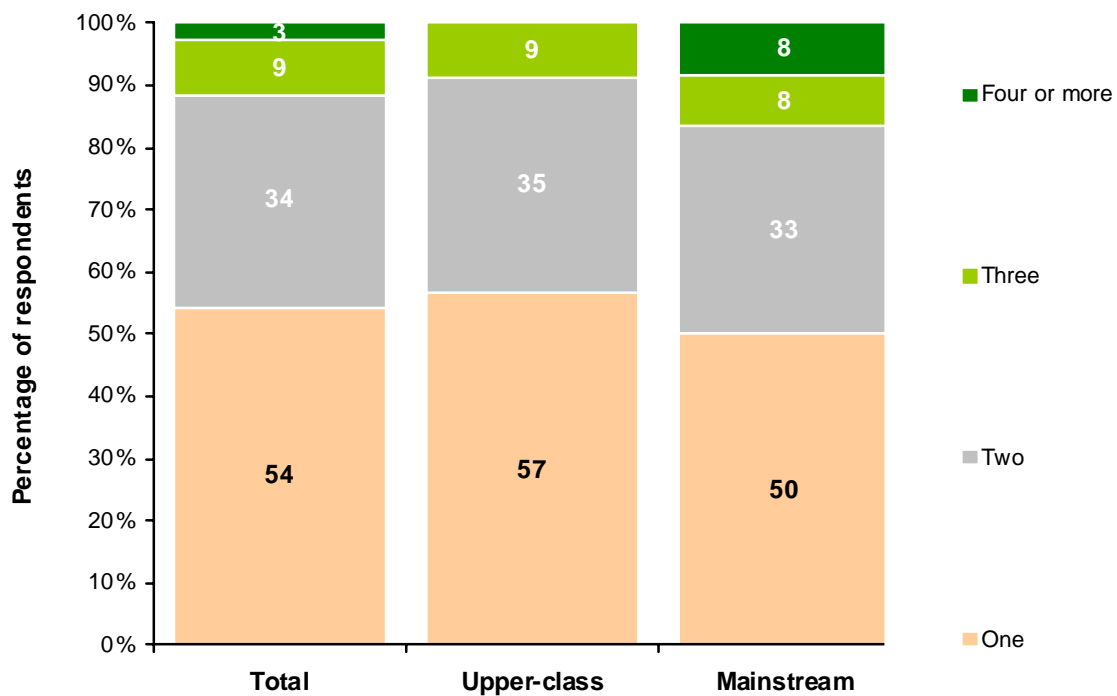


4.4 Restaurants currently serving kangaroo

Of the 209 restaurants / chefs that were spoken to only 35 currently serve Kangaroo so this section has very low bases and the following results should be used cautiously.

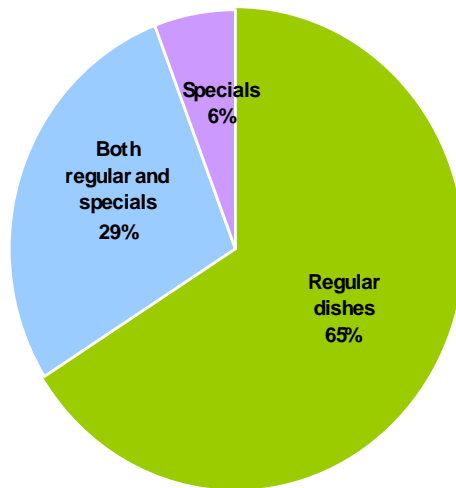
Most restaurants currently serving kangaroo offer one or two kangaroo dishes, which tend to be regular dishes rather than specials (Figures 19 and 20).

Figure 19: Number of kangaroo dishes offered by restaurants (n=35)



*Please note very low bases

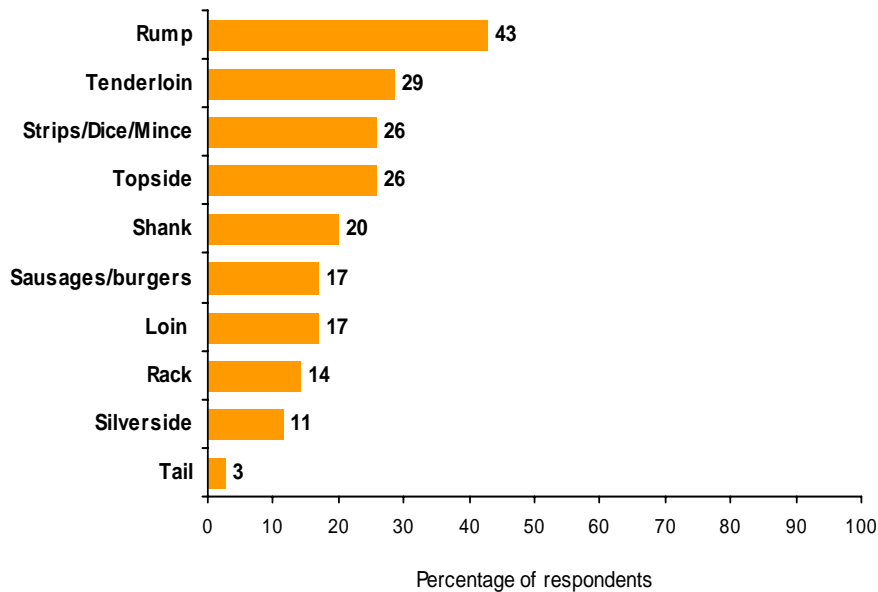
Figure 20: Percentage of restaurants which sell kangaroo as special or regular dishes (N=35)



*Please note very low bases

Rump and tenderloin are the most frequently purchased kangaroo cuts followed by strips/dice/mince and topside (Figure 21). The difference between the number of different cuts purchased at Mainstream and Upper-class restaurants is negligible (2.2 and 2.0 respectively). Popular combinations include rump and topside or rump and tenderloin.

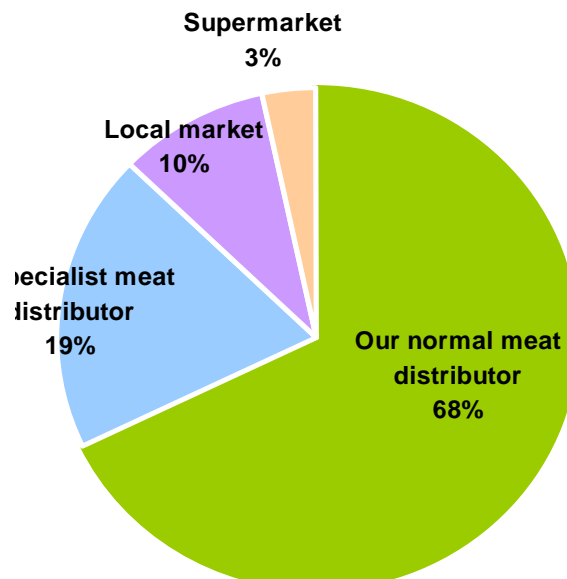
Figure 21: Types of kangaroo cuts currently purchased by restaurants (N=35)



*Please note very low bases

These restaurants currently source kangaroo meat from normal distributors (68%) and a smaller number from specialist meat suppliers (19%) as presented in Figure 22.

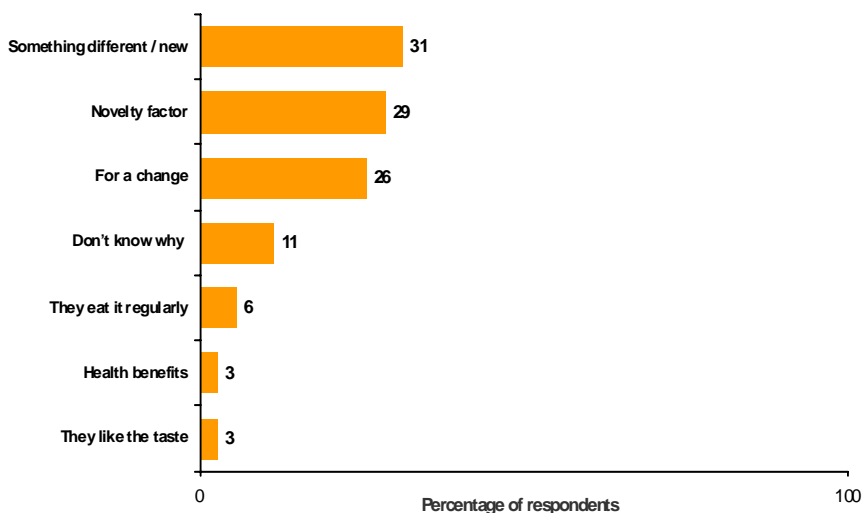
Figure 22: Where restaurants purchase kangaroo meat from (N=35)



*Please note very low bases

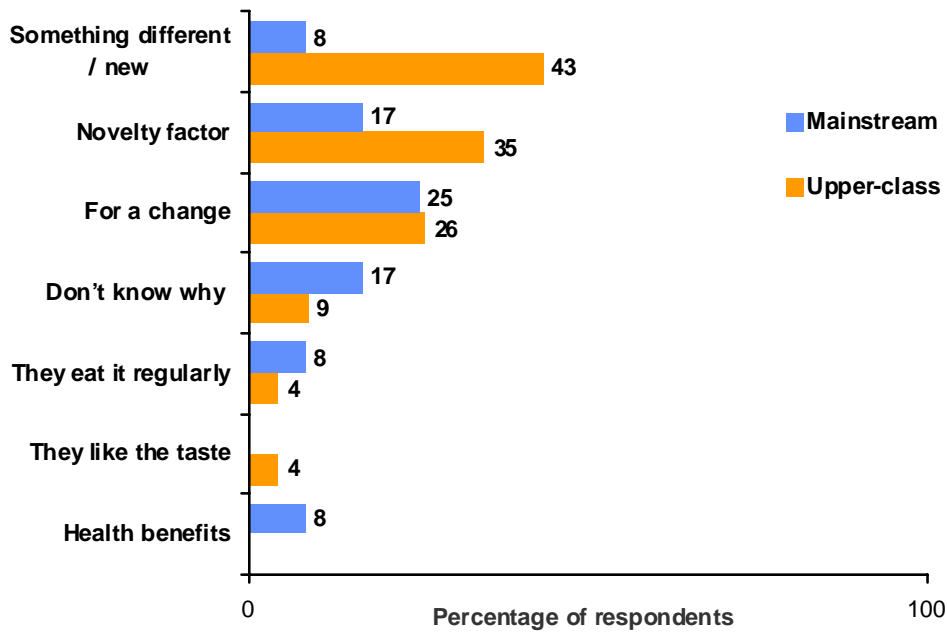
Chefs currently serving kangaroo believe that customers order Kangaroo as something new and different rather than for health or taste reasons (Figure 23). Results suggest that it is more the upper-class restaurants (rather than mainstream) where customers are ordering kangaroo as something novel / different (Figure 24), although this is based on a very small sample and so is only indicative.

Figure 23: Why customers order kangaroo in restaurants (N=35)



*Please note very low bases

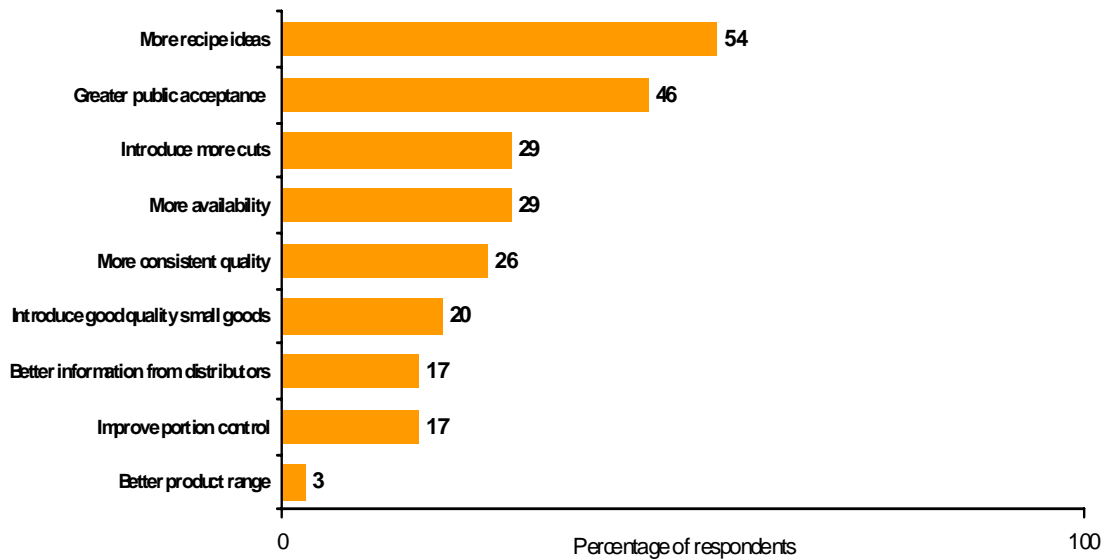
Figure 24: Reasons customers order kangaroo in mainstream and upper-class restaurants (N=35)



*Please note very low bases

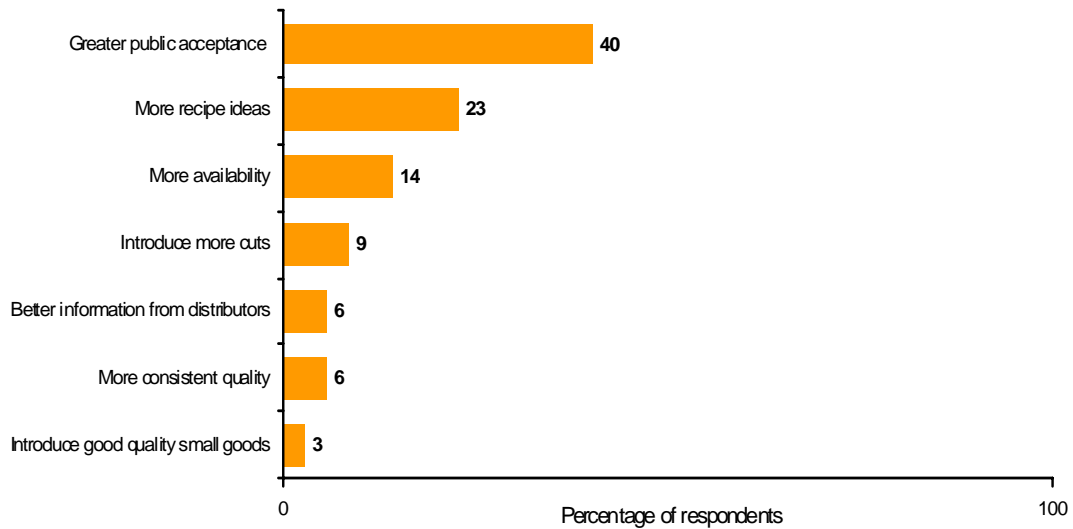
To increase the number of kangaroo dishes offered in restaurants chefs require more recipe ideas and greater public acceptance, the latter identified as having the biggest impact (Figures 25 and 26).

Figure 25: Recommended improvements to kangaroo by chefs to increase customer purchase and consumption (N=35)



*Please note very low bases

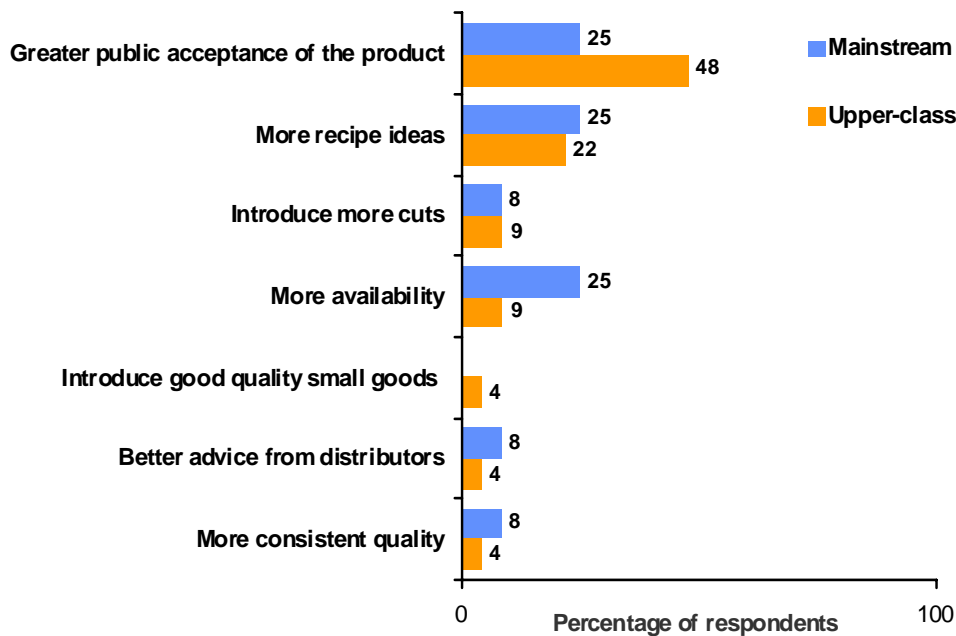
Figure 26: Recommended improvements to kangaroo by chefs to increase customer purchase and consumption which will have the biggest impact (N=35)



*Please note very low bases

While upper-class restaurants find greater public acceptance to be the most prominent, mainstream restaurants also feel that more recipes and more availability are equally important (Figure 27) [Please note the very low bases on the responses].

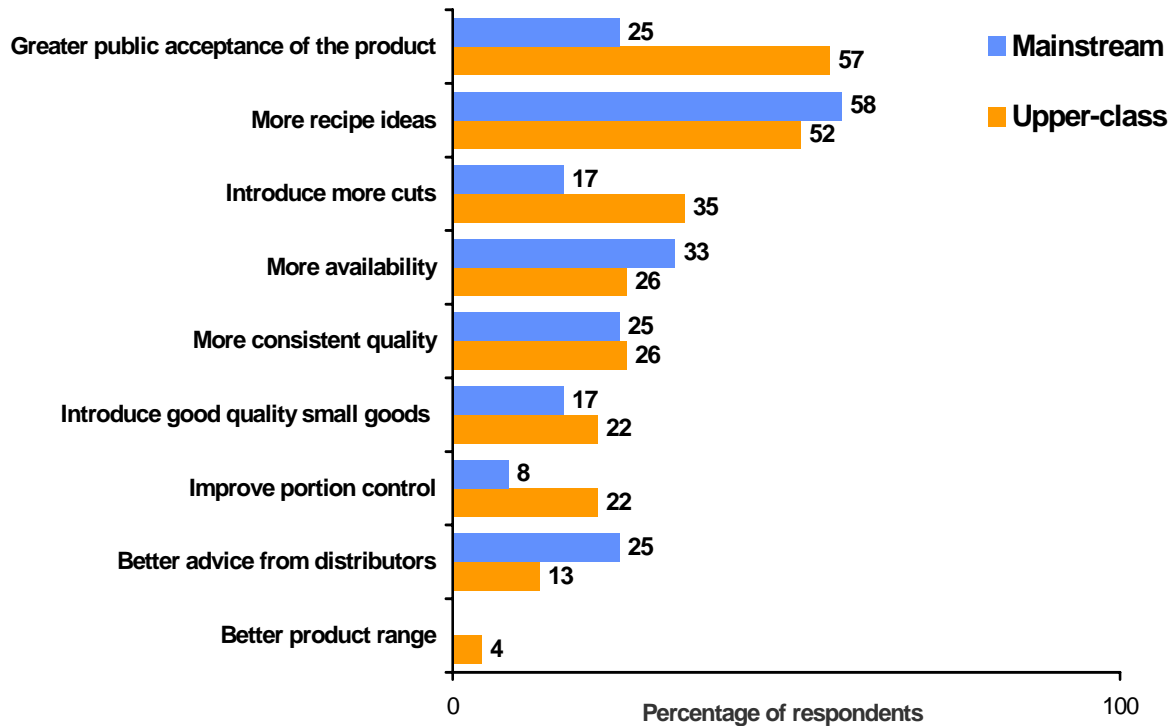
Figure 27: Recommended improvements to kangaroo by chefs to increase customer purchase and consumption which will have the biggest impact mainstream and upper-class restaurants (N=35)



*Please note very low bases

Compared to mainstream restaurants, chefs at upper-class restaurants would be more influenced to increase kangaroo on menus: greater public acceptance of kangaroo products, a greater number of cuts, and improved portion control (Figure 28).

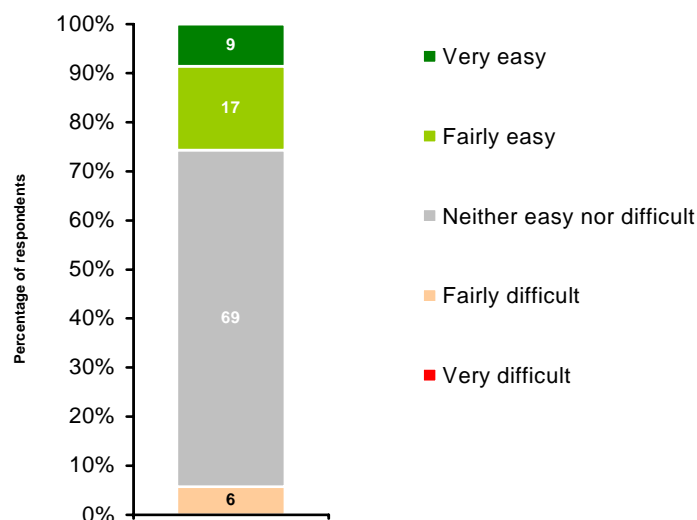
Figure 28: Recommended improvements to kangaroo by chefs to increase customer purchase and consumption mainstream and upper-class restaurants (N=35)



*Please note very low bases

Ease of cooking kangaroo meat is not a problem for chefs (35) who are currently serving kangaroo meat with only 6% reported that they found it difficult (Figure 29). This value is in contrast with Figure 13 which shows of all cooks surveyed (209) the attitude was that 22% disagreed that kangaroo was easy to cook.

Figure 29: How easy chefs find cooking kangaroo (n=35)



4.5 Restaurants currently not serving Kangaroo

Over 40% of chefs who are not serving kangaroo feel that many of their customers would be unlikely to order it in their restaurant (Figure 30). These chefs are not serving kangaroo due to lack of recipe ideas and lack of interest from consumers (Figure 31).

Figure 30: Would customers order kangaroo if it were on the menu (N=174)

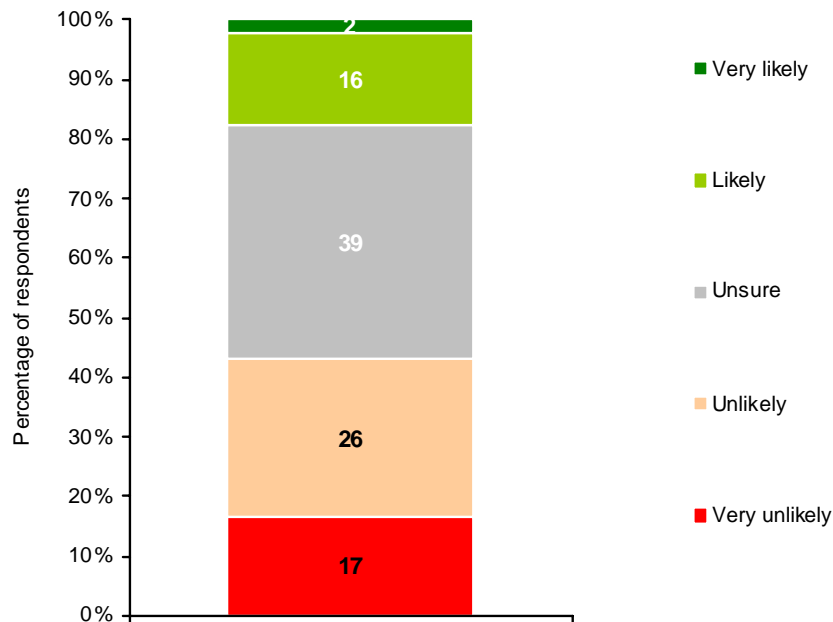
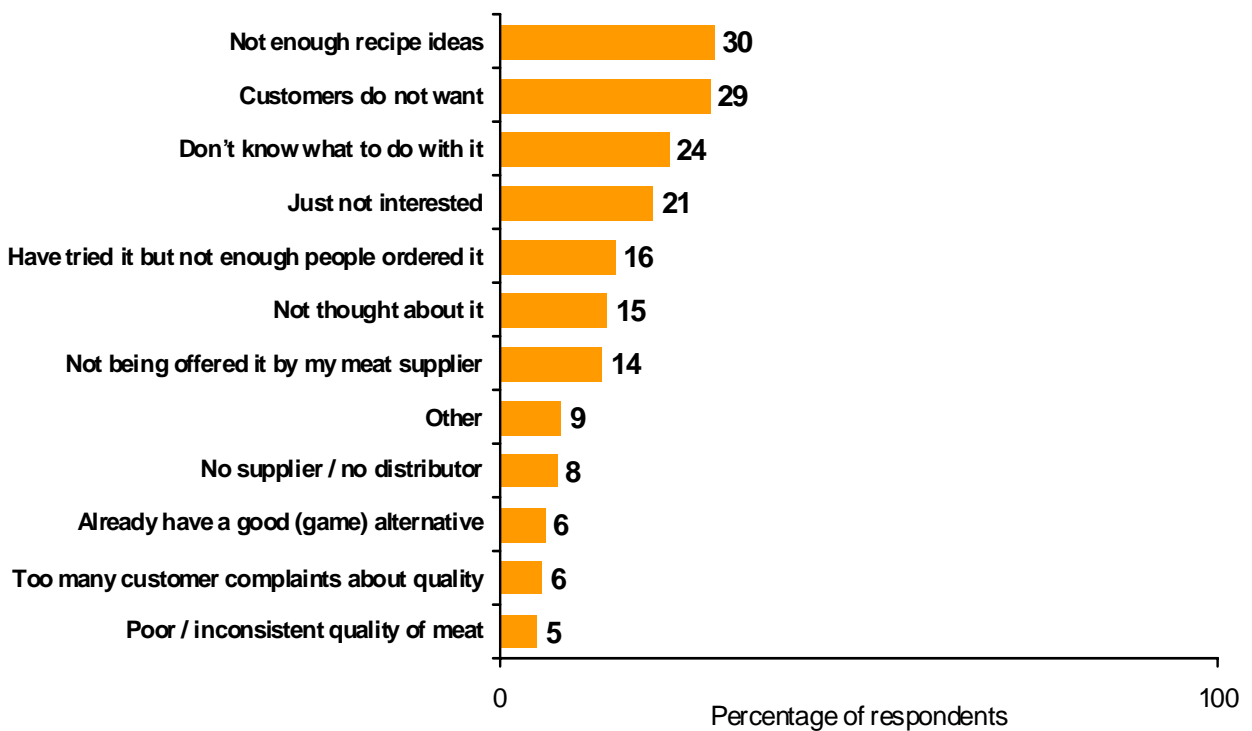
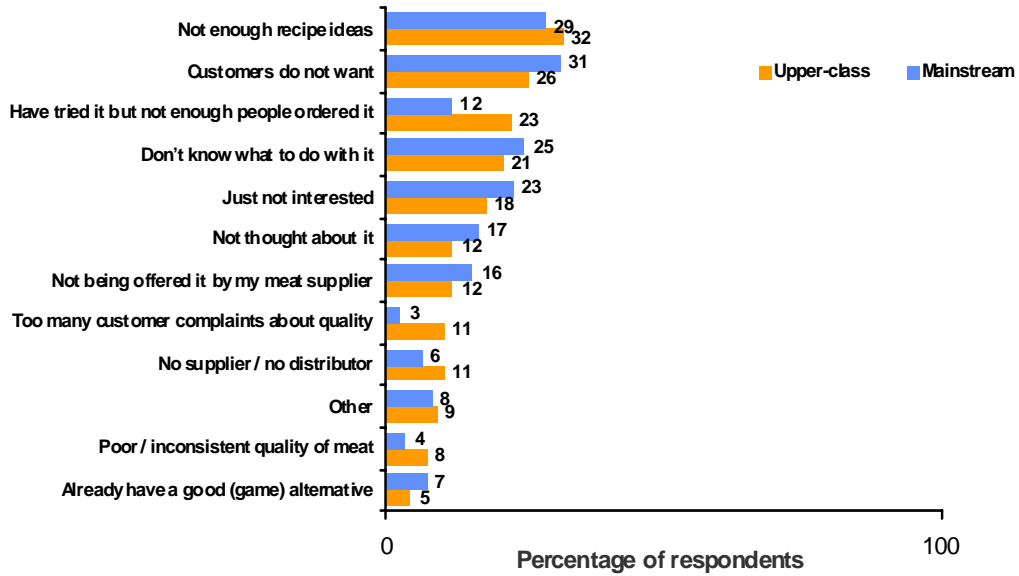


Figure 31: Reasons for not serving kangaroo (N=174)



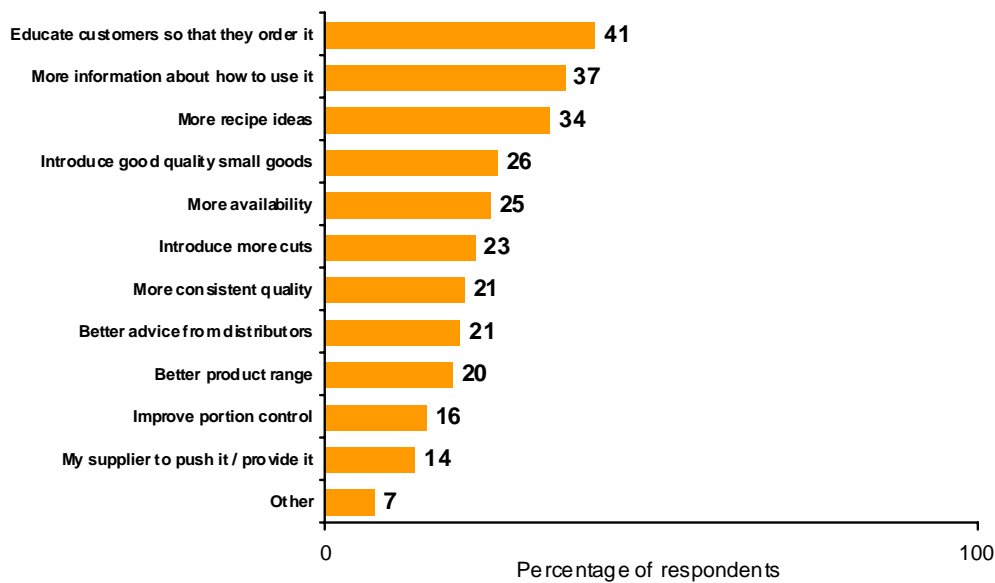
This is supported by the tendency for upper-class restaurants who have previously served kangaroo but found little consumer demand to continue serving it.

Figure 32: Reasons for not serving kangaroo meat by restaurant type (N=174)



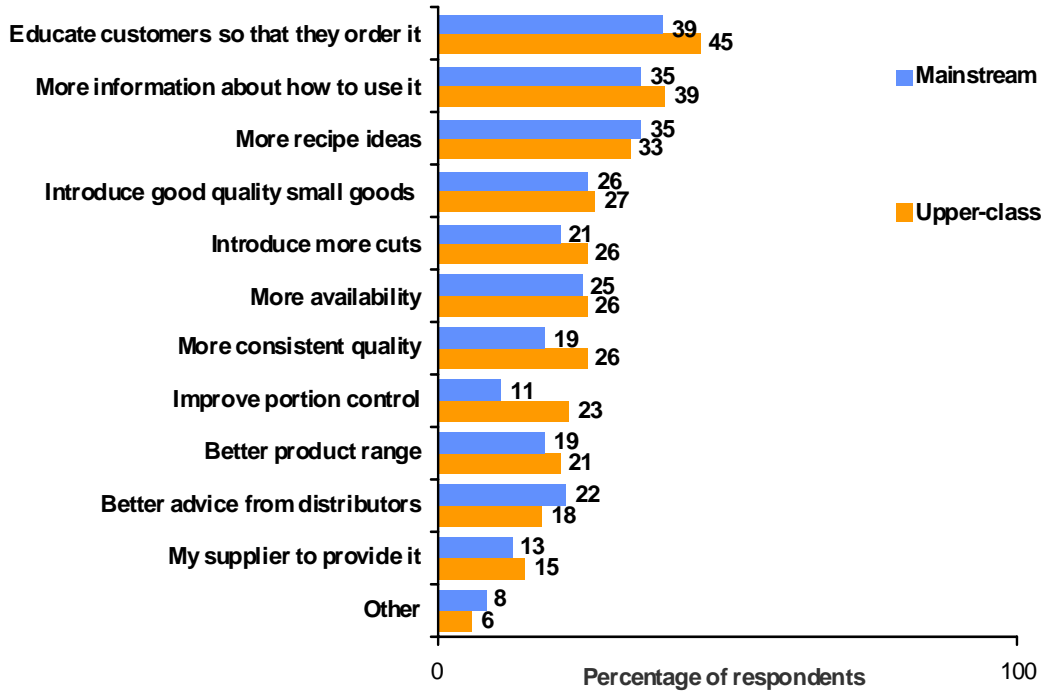
Consistent with previous results, chefs would start using kangaroo meat if customers ordered it and if they had more ideas about how cook it.

Figure 33: Improvements needed to use kangaroo meat (N=174)



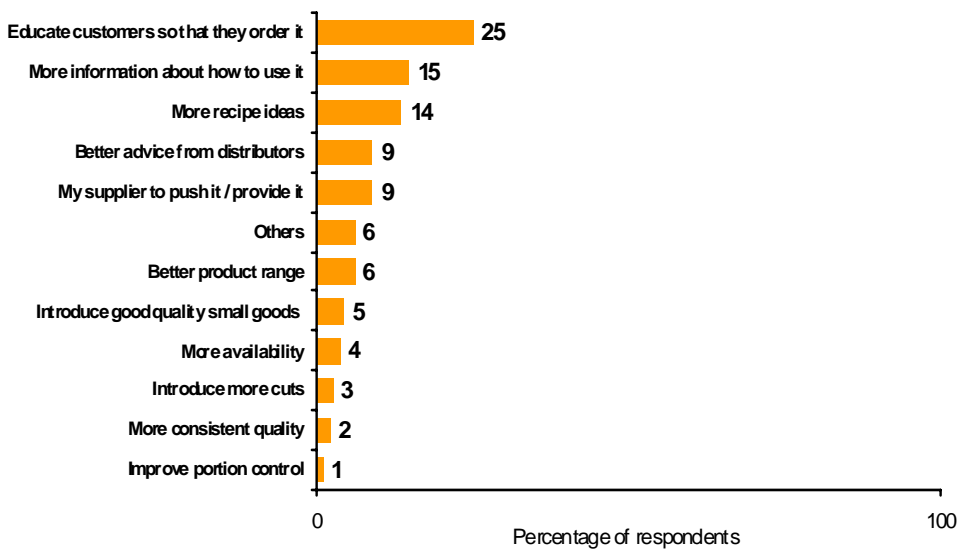
Restaurants do not differ greatly in which improvements they feel would be needed to start using kangaroo meat, with the exception of improved portion control, which is more important to upper-class restaurants (Figure 34).

Figure 34: Improvements needed to see kangaroo meat by restaurant (N=174)



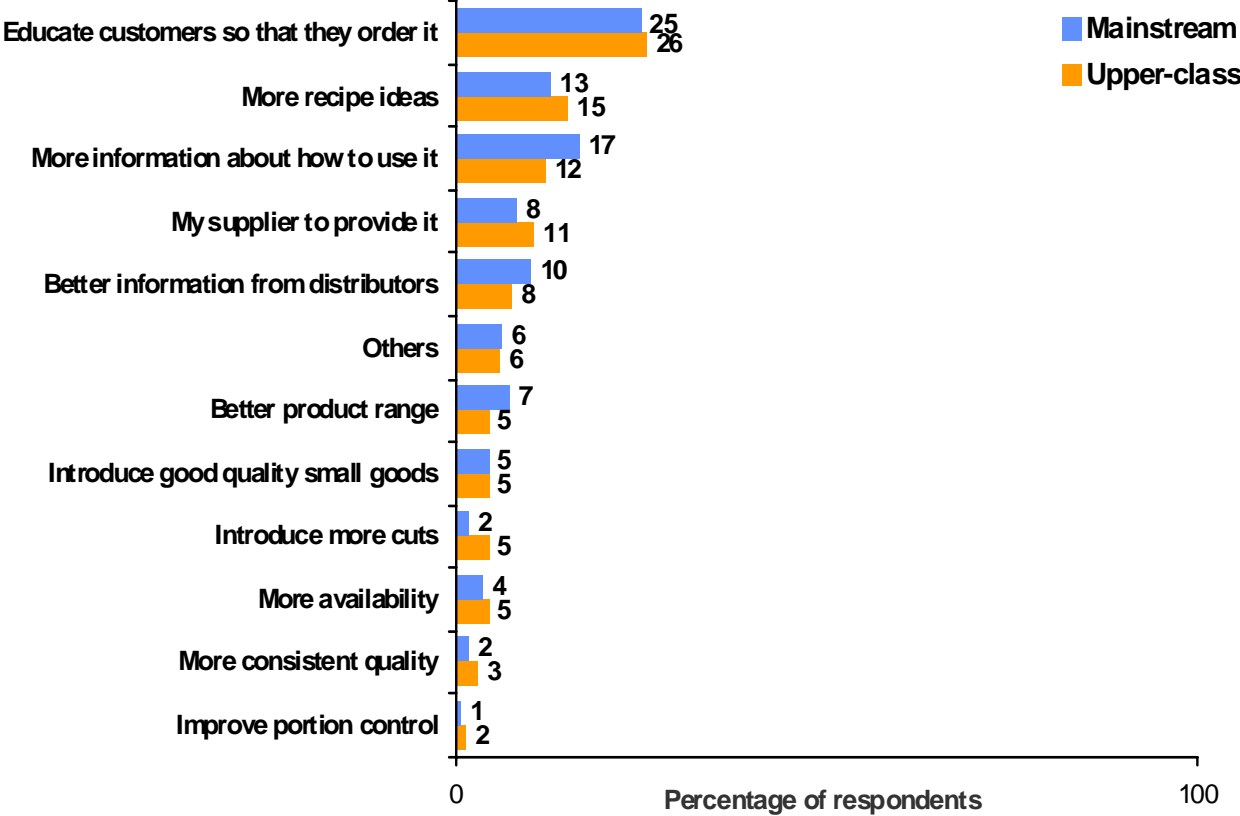
The improvement chefs feel would have the biggest impact is educating customers about kangaroo products.

Figure 35: Improvement with the biggest impact (N=174)



There are no great differences between mainstream and upper-class restaurant chefs in the improvement they feel would have the most impact.

Figure 36: Improvement with the biggest impact by restaurant type (174)



Appendix

Project Questionnaire

Recruitment Criteria

R1 Do you currently work in the food and beverage industry?

Yes -> Continue

No -> Close

R2a Which best describes your role at the restaurant / bar etc?

Chef -> Continue (ask

Cook -> Continue

Front of house

Owner

Other

R2b How of the following best describes you?

Executive Chef

Head Chef

Sous Chef

Chef de partie

Chef de Cuisine

Specialist Chef

Chef

Other type of chef (please specify) _____

R3 Which of the following types of foodservice company's best describes where you currently work?

Food manufacturing company	<i>Close</i>
Food wholesaler/ distributor	<i>Close</i>
Restaurants	<i>Continue</i>
Independent fast food restaurants	<i>Close</i>
Cafes	<i>Continue</i>
Hotels	<i>Continue</i>
Pubs	<i>Continue</i>
Clubs	<i>Continue</i>
Fast Food Chains	<i>Close</i>
Caterers	<i>Close</i>
Educational Institution	<i>Close</i>
Staff or Workplace Canteens	<i>Close</i>
Hospitals, Aged Care or Government Facilities	<i>Close</i>
Other – please specify:	

.....

R4 Which of these best describes your restaurant / bar / café / hotel / pub / club?

- 5 Star Hotel
- 3 – 4 Star Hotel
- 1 – 2 Star Hotel
- Silver Service
- Fine Dining
- Mainstream Restaurant
- Mainstream Cafés / Pubs
- Destination / Upmarket Pubs (one that customers would drive a longer distance to get to)
- Local Pub / Café
- Clubs
- Other (Please specify) _____

Section 1 General Attitudes

Q1 Which of these meats do you currently cook in your kitchen?

Beef or Veal

Veal

Lamb

Pork

Chicken

Duck

Game Meats:

Rabbit or Hare

Kangaroo & Wallaby

Venison

Goat

Crocodile

Buffalo

Game Birds:

Spatchcock (Pousson)

Pheasant

Quail

Partridge

Emu

Ostrich

None of the above

CLOSE

Q2 Which of these statements best describes your cooking style?

I like to use a standard set of the ingredients and am quite conservative in my menu

I like to use a standard set of the ingredients but am open to the idea of new products and ingredients

I look for new dishes but only introduce a few new ones

I am constantly looking for new ingredients and dishes and think of myself as being quite experimental

Q3 Which of these statements best describes the menu selection in your restaurant / café etc?

We have had the same menu selection for the last 12 months and it takes a lot to make me change

We periodically change the menu but rotate within a group of tried and tested options

We periodically change the menu and look for new dishes to add to the menu

We regularly change the menu but rotate within a group of tried and tested options

We regularly change the menu and look for new dishes to add to the menu

Q4a Here is a list of sources that you could use to find out about new recipes, ingredients, suppliers etc? Which one do you use most often? And which others do you use?

	Most often (single code only)	Others (Multicode allowed)
Magazines		
Talking to other chefs / cooks		
Talking to customers		
Talking to my distributors / suppliers		
Going to other restaurants / cafes and seeing what they offer		
From opinion leaders in the sector		
Trade shows		
Other (Please specify) _____		

ASK Q4b-d IF MAGAZINES MENTIONED IN Q4a

Q4b Which magazines in particular do you use as a source of information?

Delicious

Eat Drink

Australian Good Taste

Retail World

Vogue Entertaining & Travel

Foodservice Rep

Superfood Ideas

Donna Hay

Inside Out

Open House

Hospitality

Gourmet Traveller

Other (please specify)

Q4c And which do you feel is best?

Delicious
Eat Drink
Australian Good Taste
Retail World
Vogue Entertaining & Travel
Foodservice Rep
Superfood Ideas
Donna Hay
Inside Out
Open House
Hospitality
Gourmet Traveller

Q4c Which sections of the magazines do you use in particular?

Recipes
Articles
Adverts
??

NOW GO TO Q5.

ASK Q4d IF "TALKING TO MY DISTRIBUTORS / SUPPLIERS" MENTIONED IN Q4a

Q4d Does your meat distributor ever talk to about the benefits of any particular meats or how to prepare them etc?

Yes -> ASK Q4e
No -> GO TO Q5

Q4e Which meats do you get advice on?

Repeat list from Q1

Q5 I would now like you think specifically about Kangaroo meat and what your personal attitudes and perceptions are of it? Can you please tell me how much you either agree or disagree with the following statements that have been made about Kangaroo meat.

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
It is a healthy meat					
It is a versatile meat					
There are a lot recipes for Kangaroo meat					
It is a high quality meat					
It is difficult to source Kangaroo meat					
I can't get it chilled and this is a problem.					
It is never aged properly					
It is of inconsistent quality					
It is easy to cook					
It comes in consistent portions					
It is supplied in high quality packaging					
Is premium / gourmet meat					
It has little flavour variety					
Can be tough					

Q6 How often do you personally eat Kangaroo meat?

- Regularly
- Occasionally
- Rarely
- I would eat it more but I can not find it
- I used to eat it but do not any more
- Tried it once and did not like it
- I have never tried

Q7 I would now like you think specifically about how you think your CUSTOMERS perceive Kangaroo meat. They think that Kangaroo meat

	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
Has to be served rare					
Is healthy					
Is premium / gourmet meat					
Is a high quality meat					
Is tough					
Is too gamey					
Is too rich					

ASK Q8 IF RESTAURANT DOES NOT CURRENTLY SERVE KANGAROO MEAT (AT Q1)

Q8 If you were to put a Kangaroo meat dish on your menu, how likely do you think your customers would be order it?

- Very likely
- Likely
- Unsure
- Unlikely
- Very unlikely

ASK Q9 – Q14 IF RESTAURANT CURRENTLY SERVES KANGAROO MEAT (AT Q1)

Q9 What Kangaroo cuts do you currently buy?

Primal cuts (bone-in):

- Rack
- Shank

Primal cuts (boneless):

- Topside
- Rump
- Silverside
- Loin (striploin, loin fillet, long fillet)
- Tenderloin (fillet)
- Tail
- Sausages, burger patties
- Strips/ Dice/Mince

Q10 How easy or difficult do think Kangaroo is to cook correctly?

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult

Q11 How many Kangaroo dishes do you have on your menu?

- One
- Two
- Three
- Four or more

Q11 What dishes do you use Kangaroo meat for? (Please type in all dishes)

Q12 Do you class these dishes as regular menu items or specials?

- Regular dishes
- Specials
- Both regulars and specials

Q13 Where do you get your Kangaroo meat from?

Our normal meat distributor

A specialist meat distributor

Local market

Supermarket

Other (Please specify) _____

Q14a What changes or improvements would need to be made in order for you to use more Kangaroo meat? Please tick all that apply?

Improve portion control

More consistent quality

More availability

Better advice and information from distributors

Introduce more cuts

Introduce good quality small goods (e.g. sausages, smoked kangaroo)

More recipe ideas

Greater public acceptance of the product

Better product range

Other reason (please specify) _____

Q14b Which of those would have the biggest impact?

Repeat list from Q14a

Q14c What do you mean by "more consistent quality"?

NOW GO TO Q17

ASK Q15 – Q16 IF RESTAURANT DOES NOT CURRENTLY SERVE KANGAROO MEAT (AT Q1)

Q15 Why do you currently NOT serve Kangaroo meat in your restaurant?

- No supplier / no distributor
- Not being offered it by my meat supplier
- Don't know what to do with it
- Not enough recipe ideas
- Customers do not want
- Have tried it but not enough people ordered it
- Too many customer complaints about quality
- Poor / inconsistent quality of meat
- Not thought about it
- Just not interested
- Already have a good (game) alternative
- Other reason (please specify) _____

Q16a What changes or improvements would need to be made in order for you to use / order Kangaroo meat? Please tick all that apply?

- My supplier to push it / provide it
- Give me more information about how to use it
- Educate customers so that they order it
- Improve portion control
- More consistent quality
- More availability
- Better advice and information from distributors
- Introduce more cuts
- Introduce good quality small goods (e.g. sausages, smoked kangaroo)
- More recipe ideas
- Better product range
- Other reason (please specify) _____

Q16b And which one would have the biggest impact?

Repeat list from Q16a

ASK ALL

Q17 How much would you expect pay for prime Kangaroo cut compared to similar cut of..

ROTATE ORDER OF MEATS	A lot less	A little less	About the same	A little more	A lot more
Beef					
Chicken					
Venison					
Lamb					
Pork					
Duck					

Q18 Do feel it would be easier or more difficult do get customers to try Kangaroo meat if you were to serve as it an Entrée?

Easier

More difficult

Make no difference

Already offer Kangaroo as an Entrée

And Finally, if you were the person who's job is was to get more Food Service professionals to use Kangaroo meat, how would you do it? Please give as much detail as possible.

Foodservice Attitudes towards Kangaroo Meat

RIRDC Publication No. 09/126

By Mark Ellis

The meat industry is one of the largest in Australia. Key competitors include beef, lamb, pork and game meats. Kangaroo meat is a healthy, nutritional, cost effective and healthy substitute for other red meats. Being a quality meat with a high profit margin for foodservice operators, Kangaroo meat has lot of growth potential as an industry.

Currently, kangaroo meat marketing is suffering from lack of information to make the best Return in Investment decisions to market to the foodservice sector. The foodservice industry is the key driver of total consumption, however kangaroo holds less than 1% of the total sales in foodservice. Both customers and chefs need to be better informed about kangaroo meat in order to increase the usage of Kangaroo meat in the foodservice sector.

The Rural Industries Research and Development Corporation (RIRDC) manages and funds priority research and translates results into practical outcomes for industry.

Our business is about developing a more profitable, dynamic and sustainable rural sector. Most of the information we produce can be downloaded for free or purchased from our website: www.rirdc.gov.au, or by phoning 1300 634 313 (local call charge applies).



Most RIRDC books can be freely downloaded or purchased from www.rirdc.gov.au or by phoning 1300 634 313 (local call charge applies).

www.rirdc.gov.au

Contact RIRDC:
Level 2
15 National Circuit
Barton ACT 2600

PO Box 4776
Kingston ACT 2604

Ph: 02 6271 4100
Fax: 02 6271 4199
Email: rirdc@rirdc.gov.au
web: www.rirdc.gov.au