CONSUMER INSIGHTS

September 2019

THE ONLINE MEAT SHOPPER JOURNEY

Last year, AHDB mapped out a range of factors that are critical to shoppers in our meat shopper journey report. The continued expansion of online sales has prompted us to look again at how consumers shop the meat category, but with a focus exclusively on the online channel.

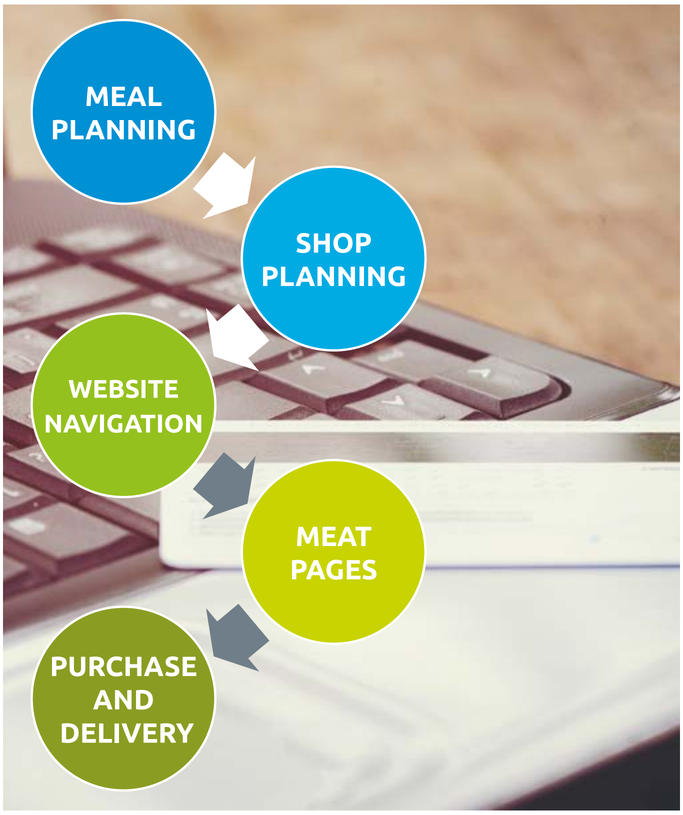
Online shopping is one of the fastest-growing channels in grocery and is currently worth £8.6bn a year – 7.5% of total grocery spend. At present, nearly all of the UK's major retailers offer online shopping and growth over the last five years has topped 30% (8% for total grocery), according to Kantar.

Shopping online provides convenience and time-saving for busy shoppers. It's also helpful for those who have limited mobility or are unable to drive. Around 28% of the population buy groceries online at least once a year, though penetration has plateaued in recent years and growth has instead come from more frequent shopping.

However, red meat under-trades online and faces specific barriers that can prevent it being bought more frequently. This report follows the meat shopper through their online shopping journey, from start to finish, to understand what influences their behaviour and identify opportunities to remove barriers to buying red meat online.

The report is based on research conducted over the summer of 2019, commissioned by AHDB with Two Ears One Mouth – an agency which specialises in shopper research. It comes on the back of an AHDB report published in 2018 following the shopper journey in store. In this report, we compare the findings to unpick similarities and differences between online and offline shoppers.

For shoppers buying meat online, the shopper journey is: Meal planning; shop planning; website navigation; meat pages; purchase and delivery.



Read about the in-store shopper journey here: ahdb.org.uk/meatshopperjourney2018

KEY FINDINGS

- **Online sales are growing, but meat isn't keeping up with the pace as consumers prefer to pick fresh foods themselves**
- **Online shopping is not as rigid as you might expect. Very few shoppers copy previous orders exactly, so there are opportunities to inspire new food choices in the online channel**
- **Getting the product listing right is key – most shoppers won't click through to the product page before adding it to their basket**
- **However, too much information is overwhelming. It's important to stick to only what's really necessary. Sites with clean lines and simple formatting are rated most highly**
- **Most selections are done from the search results page. Concentrate efforts to influence here**
- **Product tiers are much more important online – make sure they are clearly communicated. Shoppers are inferring quality from tier and it reassures them in their purchase decision. Experiment with different ways of displaying tiers, e.g. filters or grouping search results by tier**
- **Promotions play a bigger role online, where shoppers can easily see all of the products on offer and compare prices. Tempt shoppers into trying new products through promotions, particularly those products which are unplanned**

THE ONLINE GROCERY LANDSCAPE

Why do people shop online?

It's no surprise that convenience is the most popular reason for people to shop online, cited by 93% of those buying their groceries online. Of the 800 shoppers we asked, nearly all chose to have their shopping delivered, rather than using Click and Collect. Online shopping is also popular with those who are pressed for time, with 73% saying they shop online because it's quicker than shopping in store. Research from IGD[1] shows that the typical online grocery shop takes 66.2 minutes, compared with 88.9 minutes for those doing a main shop in a supermarket.

The ability to control spend is also very important, according to 72% of shoppers, while 64% say they are less likely to make impulse purchases online – creating a challenge for meats and cuts that aren't regularly bought. Online shoppers are cost-conscious and, according to IGD[2], 4 in 10 shoppers say they usually end up taking items out of their basket when they've finished their shop to reduce their overall bill.

Figure 1. Reasons for shopping for groceries online

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019

(Q – How influential were each of the following factors in your decision to do grocery shopping online rather than in a store? A: Very or quite influential. Base: 800)

Who shops online?

Online shopping is popular among families with children and particularly those where the youngest child is under nine. This group is responsible for 31% of grocery spend online (17% of spend in the total grocery market), and the more children in a household, the more likely they are to shop online (Kantar[3]).

The difficulty of taking young children around a supermarket probably motivates parents of young families to shop online. Nearly half of those asked said not having to drive/visit in person influenced their decision. Families also appreciate the time saved from shopping online and the ability to control their spending.

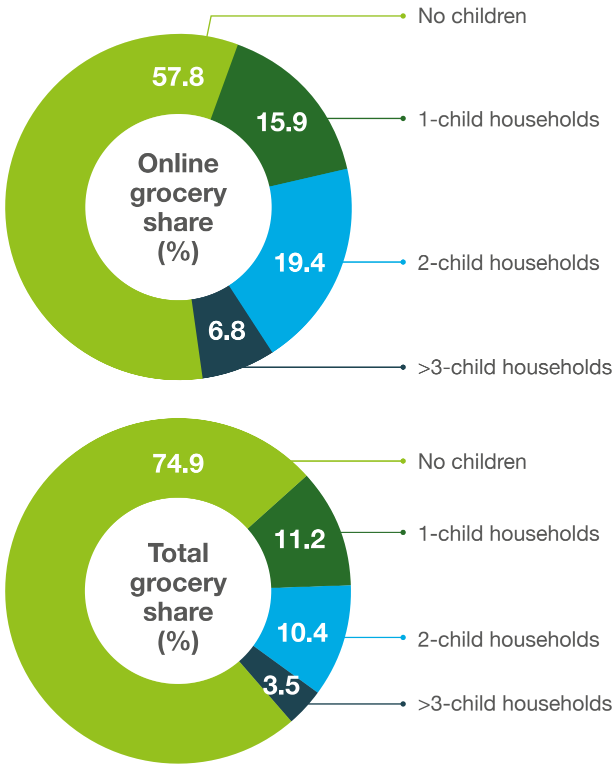


Figure 2. Share of grocery spend by number of children in household

Source: Kantar, 52 weeks ending 14 July 2019

1. Multichannel shopping – unlocking shopper behaviour by channel. IGD, June 2019
2. The online grocery path-to-purchase. IGD ShopperVista, January 2018
3. Kantar, 52 weeks ending 14 July 2019

Retired households, however, are much less likely to buy online. In the total grocery market, they account for 30% of spend but only 15% of spend online. These shoppers are less motivated by saving time and typically have more disposable income than families.

Online shopping under-trades in Scotland and the North, where lower population density limits the availability of delivery, as opposed to the South and East of England, where it is more popular.

Easier to compare prices, simple, fast order and checkout process

Ability to not go with my children who just moan

Convenient to add items to the app as and when. Easier than taking toddler shopping and avoiding busy times

Easy and quick and you can see how much you are spending easily

It's easy to budget, easy to find bargains/offers and I can do it in my pyjamas!

Saves time and means we don't have to contend with a 5-year-old in store

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019
(Q – What do you like about grocery shopping online?)

Where are they shopping?

Most shoppers we asked said they do their grocery shop in one session, with the majority doing so in their own home. Most prefer to shop on a big screen, using laptops or PCs. However, those who shop in three sessions or more are more likely to use a mobile app, which allows them flexibility and the ability to shop wherever they are.

Customers are more loyal when shopping online – 57% said they only shopped with one retailer in the last six months. However, heavy users of online shopping were more likely to visit multiple sites.

Familiarity with the retailer's website and preference of the available delivery options were the main reasons for loyalty – cited by 43% of shoppers. For those who do use more than one retailer, they shop around to access different products from different retailers.

Challenges faced by online shopping

Shopping habits have changed, with the modern consumer preferring to shop little and often as opposed to the big weekly shop. The “top-up” shop has now become more common than main shopping missions (IGD[4]) and the average basket size across the total market is only £15.46 (Kantar[3]). The average household is also shrinking in size, lending itself to smaller baskets.

Online deliveries are costly to retailers, who have to pay for assembling each order as well as delivery, including driver time and fuel. Industry specialists estimate that each order costs retailers upwards of £10 to fulfil, though this varies based on the model used. This means small baskets are not usually profitable, limiting the scale of online grocery shopping. Many retailers now specify a minimum spend or charge for delivery. The average online shopping basket is therefore much bigger than the average shopping basket across the total market, and shoppers are much more likely to be on a main shopping mission.

TOTAL CHANNELS	
Average trip spend	£15.46
Average trip volume	9.70 kg

IN-STORE CHANNELS	
Average trip spend	£9.27
Average trip volume	9.45 kg

ONLINE CHANNEL	
Average trip spend	£66.80
Average trip volume	41.30 kg

Source: Kantar, 52 weeks ending 14 July 2019. In-store channels include convenience, main store, discounters, freezer centres, bargain stores, high street

One of the biggest barriers to online grocery shopping is shoppers’ preference for choosing fresh food themselves. While they are confident in purchasing packaged, ambient goods, when it comes to fresh produce which varies more in quality, they would rather choose their own. Of those who never shop online, 69% say it’s because they prefer to pick their own produce in store. Others complain about staff picking products with short best-before dates, or receiving substitutions (IGD[5]).

I do prefer to pick my own fresh food, so I tend not to buy this online

Not being able to choose the fresh products myself as in looking at them to see if they are bruised or fatty

When they don’t have what you want so they substitute it for another item

Don’t always get longest best-before date on items

Can’t see the quality of fresh meat, fruit and veg

Tedious – you can’t always see new things like when you go to an actual food shop

I can’t see the products, especially fresh, and check the quality

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019 (Q – What do you dislike about shopping online?)

4. The importance of understanding shopper missions by channel and category. IGD ShopperVista, November 2016
5. Driving more growth online. IGD ShopperVista, August 2019

Meat faces further barriers in the online grocery market. Mince, diced cuts, bacon and sausages do not vary much from pack to pack. However, cuts like steak and roasting joints can vary substantially in aspects like appearance, fat content and size, and are also higher value, meaning shoppers can be less willing to risk purchasing these online when they can't select the product themselves. Nearly one in five shoppers said that while they would buy beef roasting joints in the supermarket, they would not consider buying them online. We see the effect of this in purchase data which shows certain cuts like roasting joints, beef steaks and chops under-trading online, while sausages and mince have a greater share of trade online than they do in the total market. However, our research uncovers some of the ways that consumers assure themselves on product quality when shopping online and unable to see the product pack.

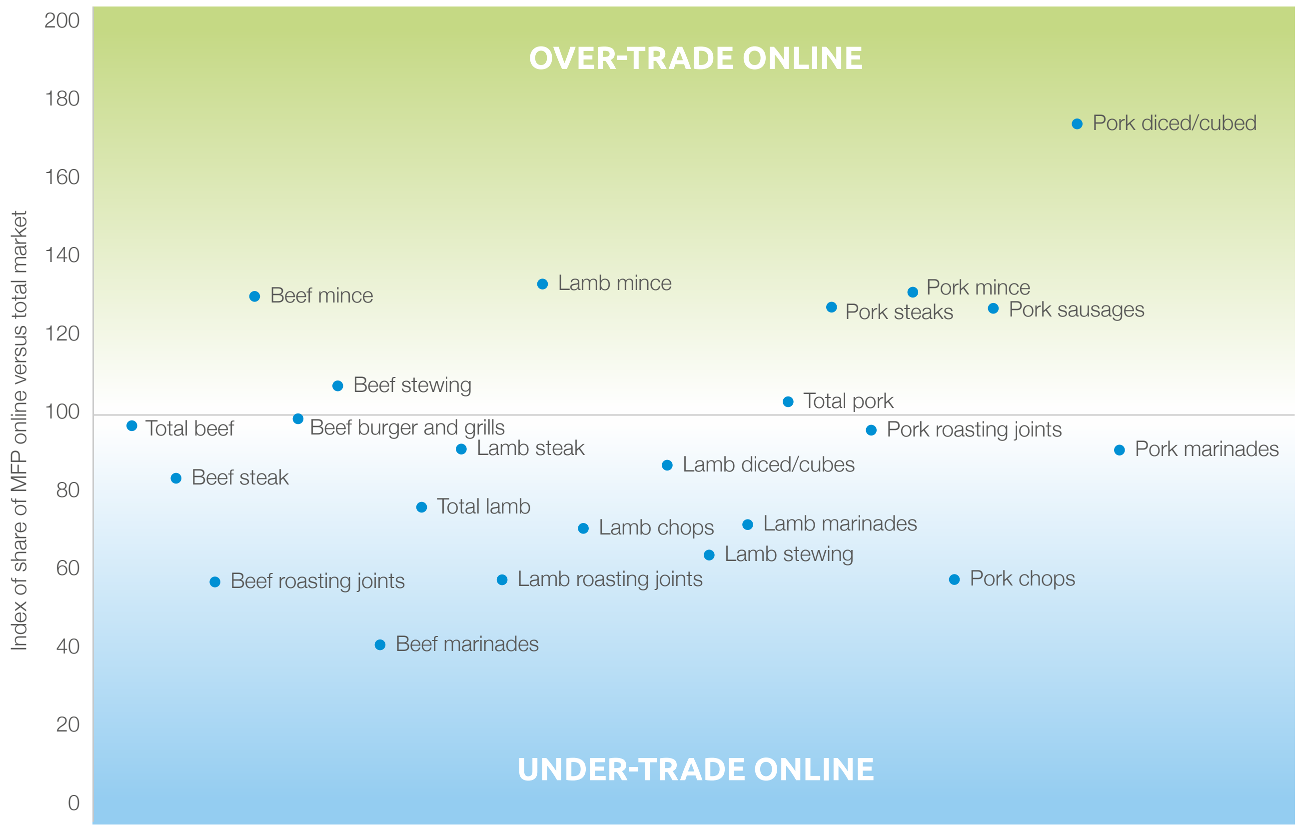


Figure 3. Index of share of meat, fish and poultry online vs total market

Source: Kantar, 52 weeks ending 14 July 2019

MEAL PLANNING

Meal planning is the same whether you shop in store or online. Therefore, we did not cover meal planning in this research project and instead refer back to the in store research which found that certain criteria are very important at the meal-planning stage: taste, quality and suitability for the whole family. With weekday meals, shoppers consider value, ease, convenience and health. For weekend meals, shoppers are more likely to look for a treat or something a bit different.

Meat is a central decision driver when choosing what meals to make, with 65% citing meat as the biggest factor driving their choice. The second biggest driver is "ingredients already available" (52%), followed by "type of cuisine" (46%). Perceptions of proteins vary and they meet meal-planning decision criteria in different ways. For more detail, please see our earlier report **ahdb.org.uk/meatshopperjourney2018**

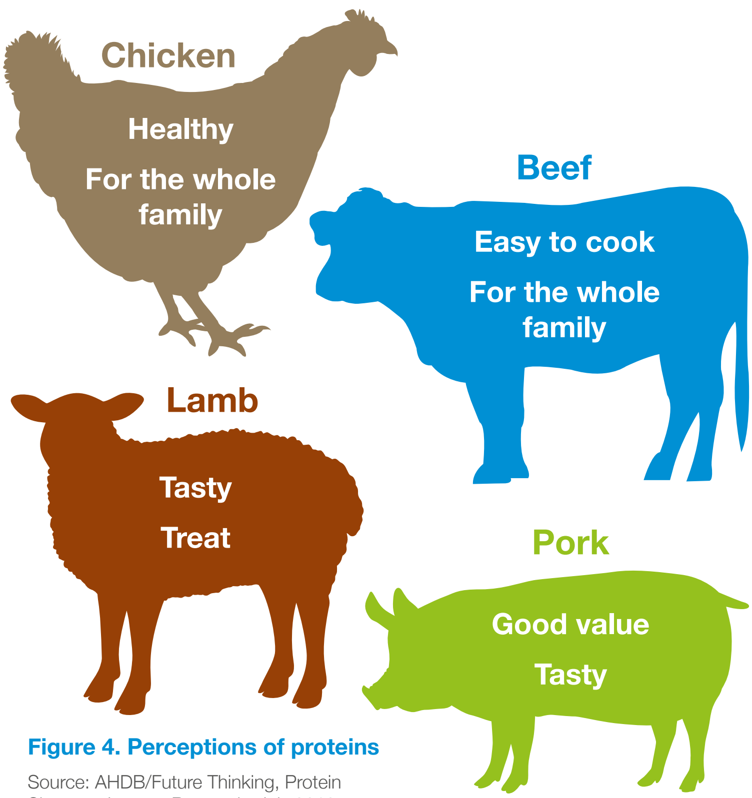


Figure 4. Perceptions of proteins

Source: AHDB/Future Thinking, Protein Shopper Journey Research, July 2018

SHOP PLANNING

When it comes to planning, online shoppers follow much the same pattern as they do in store, with most having some degree of flexibility in their shop: 61% say they have a flexible plan for their main shop (59% in store) while 34% stick to a strict plan (36% in store) and 4% shop with no plan at all (5% in store).

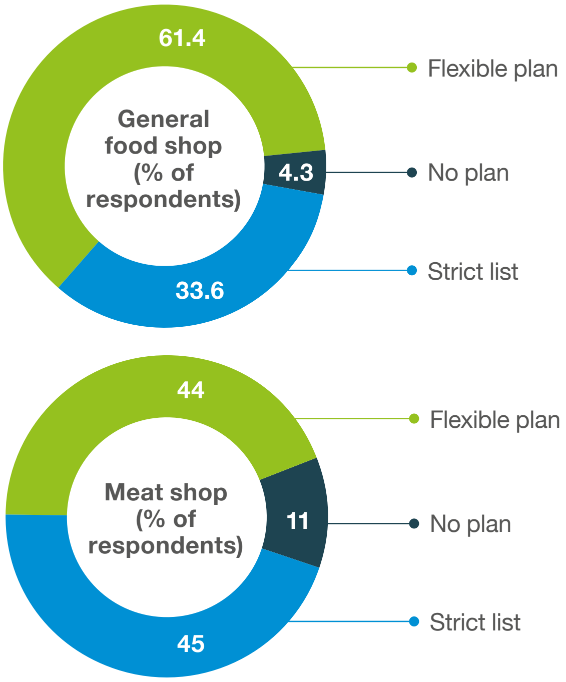


Figure 5. Percentage of respondents who plan an online shop and a meat-specific online shop

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019

Shoppers seem to be less flexible when thinking about meat – with 45% saying they shop with a strict list. This still leaves 55% open to influence and inspiration, with 11% claiming they shop for meat with no plan at all.

Online shoppers take advantage of the flexibility of shopping online: 35% don't do their shop in one go and will return to their order to add or change items. A third say after starting their shop, they check their cupboard and fridge to see what they have in stock. Just over a quarter say they compare the price of the product they're buying – rising to a third when shopping for lamb, which could be because of hesitancy to spend on a higher-priced protein. Around 10% take the opportunity to look at recipes online or in a cookbook, though more say they seek inspiration before starting their shop (13–14%).

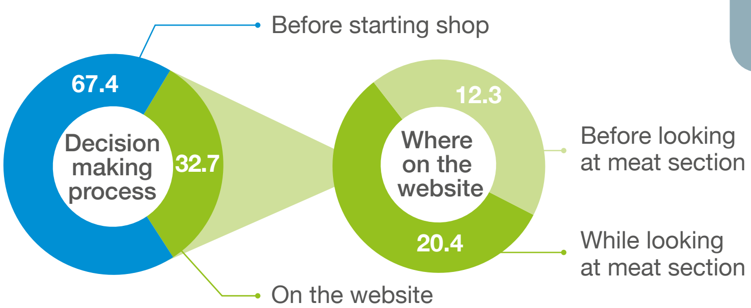


Figure 6. Where shoppers decide which protein they want to purchase

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019

IN STORE PRE-FIXTURE

When it comes to picking meat, the type of protein and cut is more often decided before starting an online shop – with 67% of consumers making the decision on protein prior to going online. This is particularly the case for mince and chicken breasts, which shoppers tend to buy as staples, confident they can use them in their repertoire of meals. However, this is lower for pork and added-value products, where shoppers are inclined to take inspiration from browsing the meat section of the website. Decisions on pack size, quality of meat and budget are more likely to be decided while shopping.

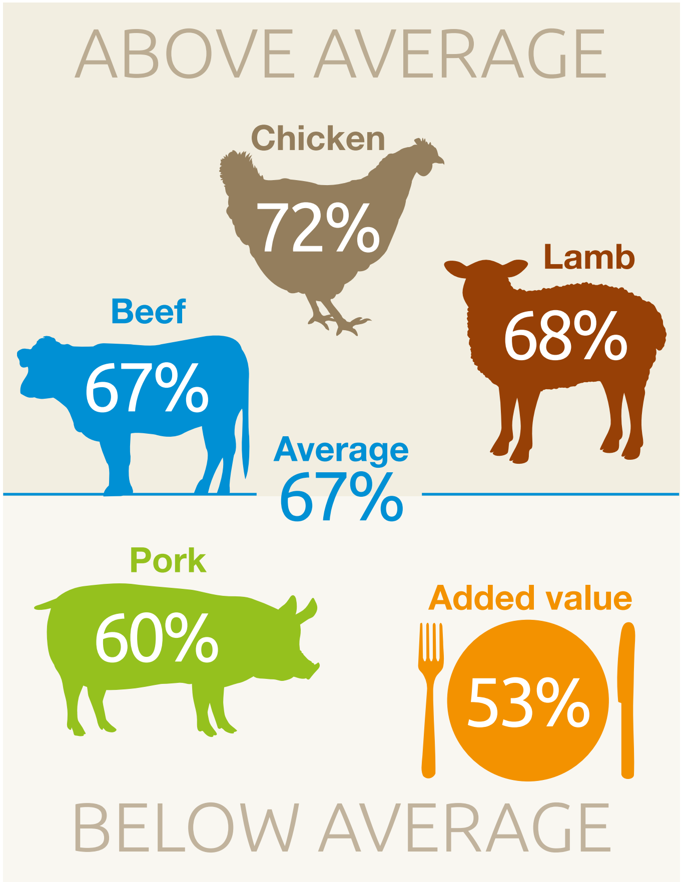


Figure 7. Percentage of respondents who decided what meat to buy before they started their online shop

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019

Implication – Added value is least likely to be planned, but shoppers are open to trying it. Increased prominence in the online shop could help to boost sales. Pork is also unplanned 40% of the time, leaving opportunities to activate sales.

WEBSITE NAVIGATION

The journey to selecting a product can take many different routes online. Shoppers can find products using search tools, navigating through the category menus, promotional pages, copying a previous order or using their saved list of favourite products.

Most meat shoppers navigate to their meat using the search tool (71%), followed by the category pages (43%) and promotional pages (31%). The search tool is more commonly used for those proteins and cuts seen as staples, where shoppers know exactly what they want without browsing the virtual aisles.

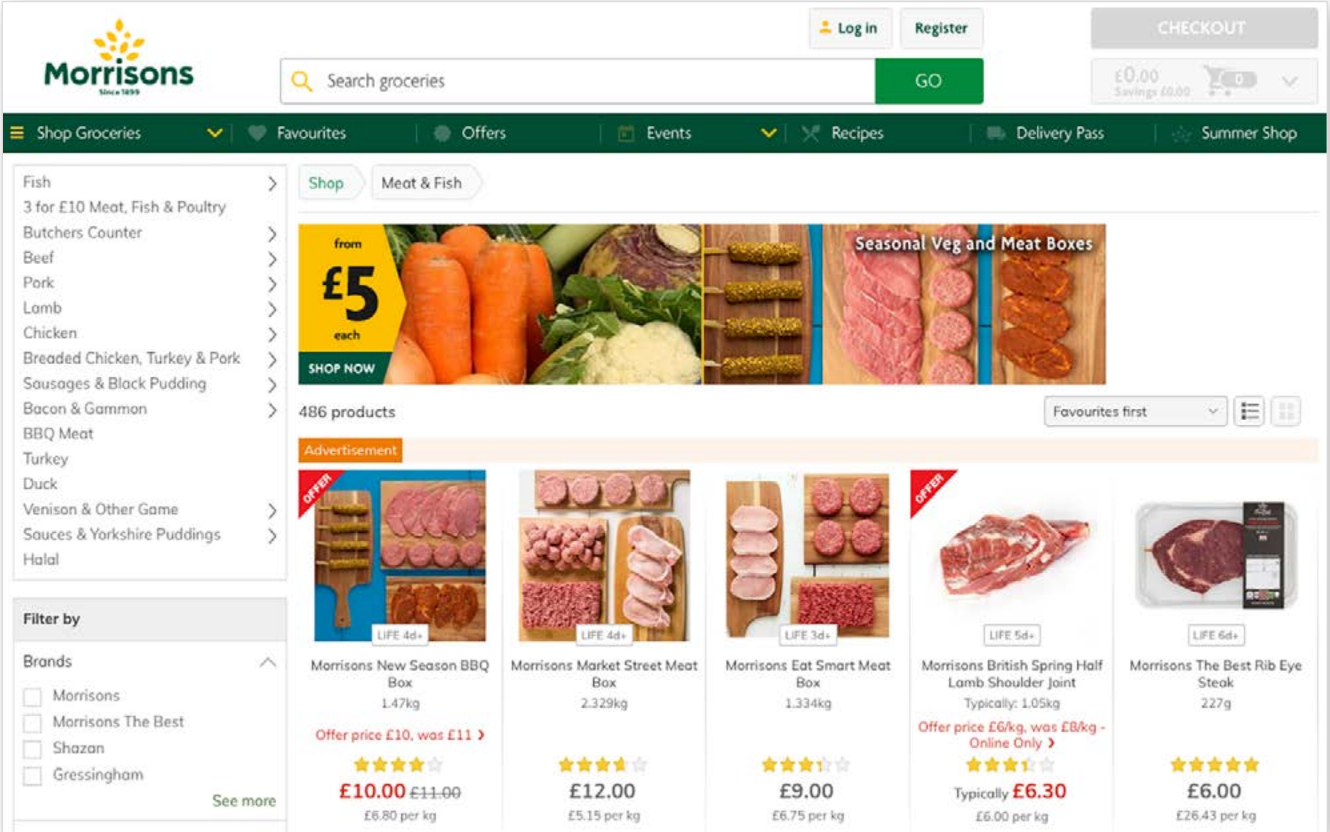


Figure 8. Example meat category page, Morrisons

The role of saved shopping lists

Online shopping allows a number of time-saving mechanisms, including the ability to repeat a previous order exactly. However, only 10% shop in this way, rising to 18% among young families who may be looking to save time. Meanwhile, 52% claim to use their “Favourites” list, though most use it as a filter list rather than adding all of the items to their basket, and 42% say they start their shop from scratch, though this is more common among households without children who have a little more time on their hands.

The role of promotions

Promotions play a more important role online than in store. 45% of shoppers said the meat they last purchased online was on promotion (30% in store). This is higher for added-value products, meaning promotions are key for tempting people into the category. Promotions play a much bigger role for beef and chicken online, compared with in store. This may be because shopping online makes it easier to see what’s on offer.

Promotional/special-offers pages are popular and allow shoppers to see all of the offers in one place – we observed 13% of shoppers selecting their meat from this page. It could also be because the typical online shopper is slightly different in their life stage and likely to be more budget-conscious. In our survey, empty nesters were the least likely to buy meat on promotion, perhaps because they have fewer budget constraints.

	Bought on promotion (%)				
	Pork	Beef	Lamb	Chicken	Added value
Online	44	47	47	42	61
In store	35	21	39	21	40

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019 (Q – Was the meat you bought on offer?)

Implication: Prominence of meat on promotional pages is crucial. Use promotions to tempt customers into buying proteins or cuts that aren’t typically on their shopping list.

Dwell time

As in the previous research, we have measured how long it takes shoppers to select meat. In this case, we observed the length of time shoppers took from beginning their meat shop (entering search criteria, or selecting a dropdown from the category menus) to adding the product to their basket.

Online dwell times are generally shorter than those observed in store, taking an average of 35 seconds from beginning the meat selection to adding it to the basket. In store, the average time spent at fixture before adding to basket was 62 seconds. Online, shoppers rely on familiar cues rather than inspecting the physical product, which makes dwell time shorter.

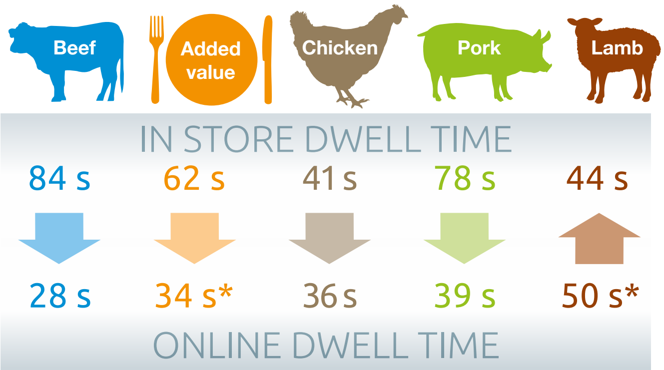


Figure 9. Dwell time by protein type

Online observations: Click section to add meat to basket: Base: All responses 310, Chicken 122, Lamb 25, Pork 44, Beef 87, Added value 21

In store observations: Time at fixture: Base: All respondents 419, Chicken 208, Lamb 69, Pork 61, Beef 144, Added value 60

*= low base

Mince had a surprisingly long dwell time in store (78 s) which we attributed to the wide range of tiers and fat levels available. Online, it has one of the lowest dwell times (24 s) which may mean it's easier to see the range available and choose between them online.

Although it's not possible to inspect the visual appearance of steaks and roasting joints online, they still have relatively long dwell times (45 s). This may be because of the wide range of these cuts available and also because they are high-value cuts. We also found that steak shoppers are more concerned about the appearance of the product: 35% of shoppers in our study who bought steak said the product's appearance was influential, which is significantly higher than the average for meat (28%).

Even though the product image online shows a representative example of the steak, it is still important to shoppers when choosing what to buy. Over half of the shoppers who said appearance is important to them when choosing meat claimed to make use of the zoom function to inspect the product image more closely.

Satisfaction with product images is generally high. Only 2% of the meat shoppers we interviewed said they were 'not very satisfied' or 'not satisfied at all' with images of meat shown online. The highest dissatisfaction was with chopped/diced pork (6.6%), minced pork (5.6%) and minced lamb (5.2%).

All the photos look great, very appetising

The lamb all looked nice and fresh, not too much fat, which is a thing I would look at if buying in store

Perhaps consider including images depicting item as it is intended to be prepared, served

Overall I was happy with the images, nothing to dislike

The photos are good but they don't inspire you to make a meal and they are all similar

I don't know – does anyone really like looking at packs of raw meat?

I'm not sure it would be possible to make raw meat look more inspiring

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019. AHDB/Future Thinking, Protein Shopper Journey Research, July 2018

(Q – How satisfied are you with the images of meat shown online?)

(Q – Why do you say that? Is there anything you would suggest improving specifically or any particular types of images you would like to see?)

Claimed meat decision criteria

It's important to understand what shoppers claim to be important considerations when purchasing meat, in order for us to understand how to influence their purchases. We have uncovered some key differences between what people claim to be important when shopping for meat online, versus when they shop for meat in store.

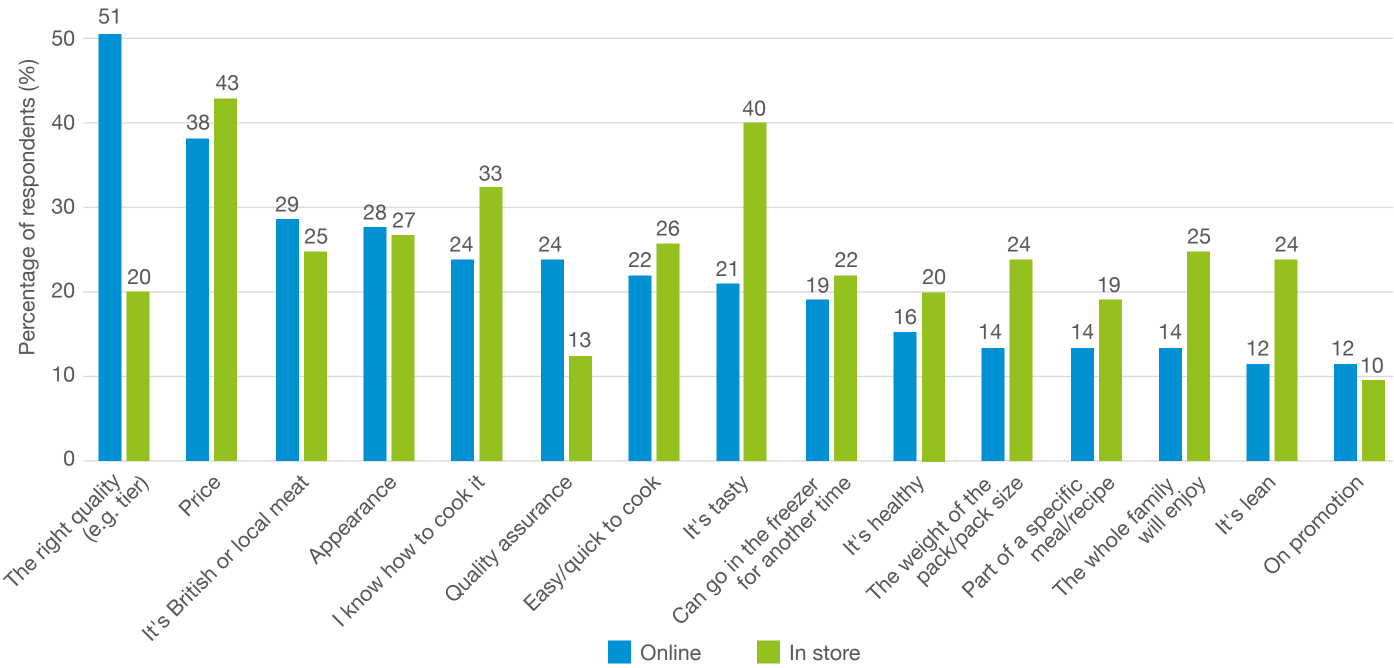


Figure 10. Claimed meat decision considerations – Top 15 (% of respondents)

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019. AHDB/Future Thinking, Protein Shopper Journey Research, July 2018
(Q – Which of these played a part in your decision to buy ... on this occasion? Base: Online 1,181; In store 751)

Key differences in decision drivers online

When we ask shoppers what is important to them when choosing meat online, "the right quality tier" comes out on top (51% claimed importance). This differs to in-store, where price is the most common factor driving choice and quality tier is the eleventh-ranked factor. While shoppers in store are able to inspect the meat's appearance to judge its quality, it seems that online shoppers are relying on tiering to infer quality.

Quality tier played a role in my decision (%)	
Chopped/diced chicken	70.2
Chopped/diced lamb	64.7
Chopped/diced pork	63.9
Average	50.9
Mince beef	47.6
Pork roasting joint	46.7
Pork steak	38.6

Figure 11. Quality tier played a role in my decision

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2018

We also asked shoppers which factor was most important, if they could only choose one. Quality tier came out on top, chosen by 23%. However, for some cuts, tier was much more likely to be deemed the most important factor, namely minced pork (39%), chopped/diced lamb 30% and lamb steaks (28%).

According to Kantar[3], economy and premium-tier primary meats have a greater share of sales online than they do in store. The standard tier, which accounts for 88% of primary red meat spend in the total market, has only an 83.5% share online. In store, the standard tier usually has the lion's share of facings devoted to it, while other tiers are given less space on shelf. Online, the tiers have roughly equal prominence, which may help to boost the sales of smaller tiers.

Additionally, shoppers may be more likely to choose premium meats online if they are concerned about quality and being unable to select the particular piece of meat they want. In this instance, they may use the premium tier as a way of reassuring on quality.

Economy tiers may also have a larger share of sales online because the typical online shopper is budget-conscious: 72% of the shoppers we asked said they shopped online because they find it easier to control their spending.

Taste, however, is a much less important factor online, ranking eighth in the list and driving only 21% of meat choices. In store, it is the second most important factor, driving 40% of decisions. Shopping in store is a sensory experience and shoppers are engaging with the product in a different way. They're also more likely to be thinking about a meal to be prepared on that same day, so taste is more likely to drive their impulses. Online shoppers are typically shopping a few days ahead of receiving the meat and have a planning mindset instead – only 6% of our shoppers were planning to use their meat on the same day they bought it.

Online shoppers are also more likely to be influenced by whether a product can go into the freezer for another time as they have less control over the use-by dates on the products they receive. This is particularly important for empty nesters. They have smaller households but still need to meet the minimum spend requirements for online delivery so will likely be purchasing food to cover their needs for a few days or weeks. Some retailers display an icon on the product listing to indicate whether it can be frozen or not.

Implication: Tiers are vital online. Shoppers use them as a proxy to infer quality. Ensure that product tier is clearly signalled and explore filtering that can help customers find what they are looking for.

Claimed versus actual

There are numerous factors which shoppers say are important to them when choosing meat online. However, by interviewing shoppers immediately after they had completed their shop, we were able to find out what was actually important in their decision. This can vary quite considerably from claimed importance. While 29% of shoppers say their meat being British/local is important to their decision, when it actually comes to choosing which meat to have, only 11% of decisions are driven by this. Likewise, quality assurance marks (such as Red Tractor) are claimed to be important by 24% of meat shoppers, but, at the point of purchase, only 8% said they were influential. However, this is still higher than in store where we found quality assurance marks were influential in only 5% of decisions.

Meanwhile, practical factors like knowing how to cook the meat and the meat being quick/easy to cook increase in importance when shoppers are at the point of adding to their basket. These patterns are very similar to those we saw in store. Whether a product can go in the freezer was also more important at the point of purchase online (Figure 12).

We asked shoppers specifically about added-value products (roast in the bag joints, ready to cook, sous vide, marinated BBQ products or raw meat with accompanying sauce, butter or rub). Fewer shoppers claimed to have seen them online than had seen in store, though many said they would consider buying them.

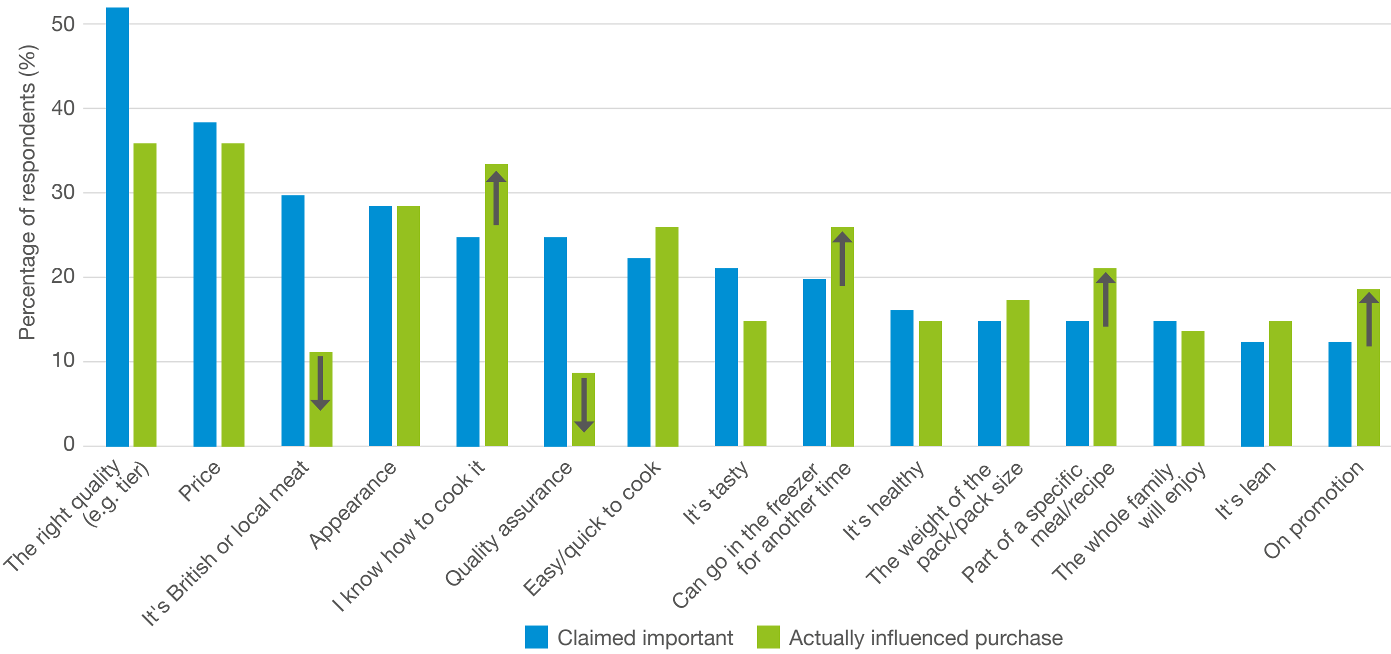


Figure 12. Top 15 claimed meat considerations versus what actually influenced at point of purchase (% of respondents)

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019

(Q – Which of these played a part in your decision to buy...on this occasion? Base: Claimed 1,181; Observed survey 314)

These products have a good fit for the online grocery audience who tend to be time-poor and convenience-driven. We can see the decision driver “I know how to cook it” increases in importance at the point of decision-making, as does “Easy/quick to cook”. Added-value products can appeal to those looking for ease and convenience – increasing their prominence online offers the chance to improve their performance.

Implication: Practical and convenience aspects become more important at the point of decision making. Bring these to life in the online fixture.

Barriers for specific cuts of meat

Certain cuts of meat face specific barriers online. We asked our shoppers if there were any products they are happy to buy in supermarkets but would not buy online. Roasting joints and steak were particularly badly affected, with nearly 1 in 5 shoppers saying they wouldn’t purchase beef roasting joints online.

We also asked shoppers why they said they wouldn’t purchase certain cuts online. Of those asked, 24% said they wanted to see that type of meat before purchasing, to check its quality, while a quarter were put off buying expensive cuts online. Moreover, 1 in 5 wanted to inspect fat content or leanness and over 6% said they found it difficult to determine the right weight to buy for certain cuts. Therefore, there is an opportunity here to help customers by providing more information on the number of portions or physical size of cuts.

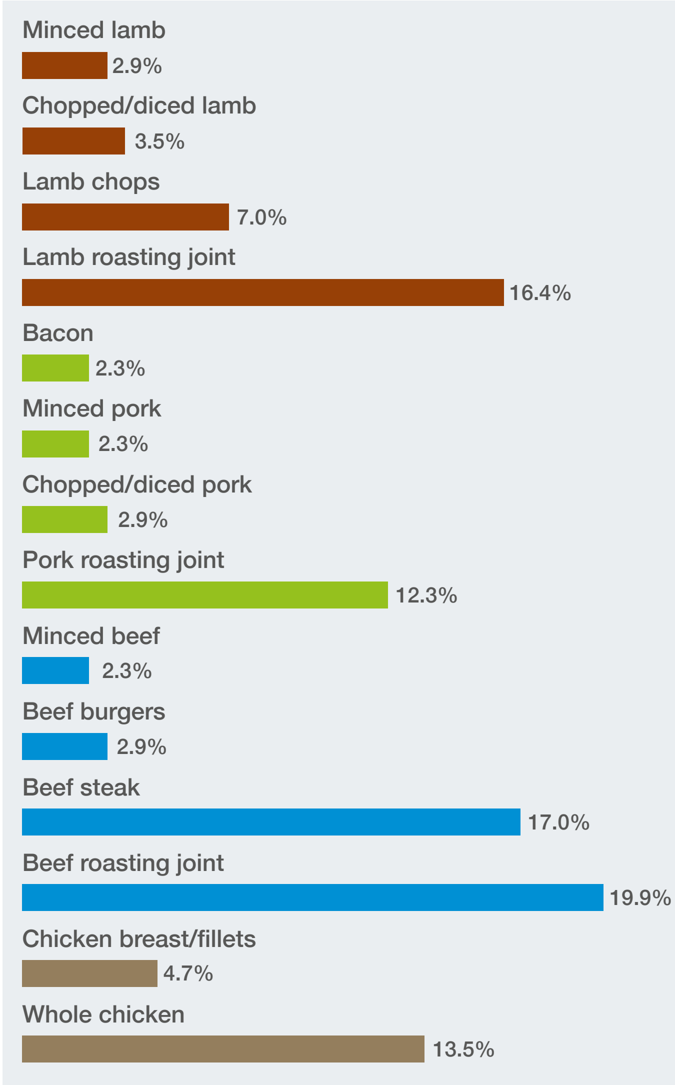
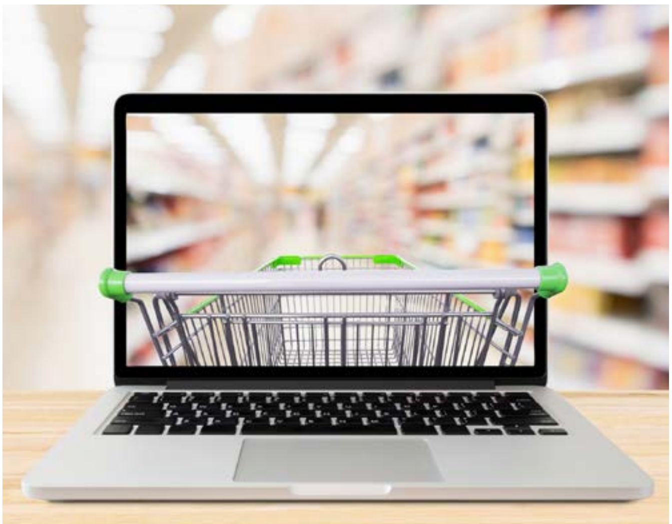


Figure 13. Cuts that shoppers say they would not buy online

Source: AHDB/Two Ears One Mouth, Online Protein Shopper Journey, July 2019
(Q – Are there any types of meat you would buy when you visit a supermarket but would not consider buying online?)

PURCHASE

As shoppers navigate through the virtual aisles, at any point they can click "Add to basket" to select a product for purchase. Over half of the shoppers we observed added meat to their basket directly from the search results page, while 14% added meat from their "Favourites" list and 13% from the promotional/special-offers pages.



This means that most shoppers will not see the full product details displayed on individual product pages. Only 10% of shoppers we observed clicked through to the individual product page before adding the meat to their basket. This highlights the need for the product listing to contain all of the most important information, though it should not appear too busy or cluttered. If your product's key selling points are buried within the product page, there's a good chance the customer won't ever see them.

Asda has shortened the shopping process even further and now allows shoppers to add to their basket from the search bar directly. This result shows only the product name, a small picture, weight, price and promotions.

Product listing

Picture
Name (including brand)
Price
Weight
Rating
Promotional inclusion
Shelf life (some)
Freezability
Country of origin

Additional information on product page

Description
Larger picture
Ingredients
Storage instructions
Cooking instructions
Nutritional content
Servings

Implication: Getting the product listing right is key. Few shoppers click through to the product page so are unlikely to see most of the detail contained within.

Before payment, most retailers' websites feature a "checkout walk" process that prompts shoppers with items they may have forgotten or alerts them to appealing offers. According to IGD[4], this part of the journey has a high level of engagement and most shoppers see a benefit from it, believing the results to be more tailored and relevant to them. IGD observed a large number of additions to the basket at this point. With shoppers in a more impulsive frame of mind, there could be opportunities to expose them to new products that fit their needs.

However, shoppers can still be price focused at this stage with 4 in 10 saying they regularly remove items from their basket when they've finished shopping to reduce their overall bill (IGD[2]). It's important that the value of each product is emphasised at this point.

Delivery

Nearly all shoppers we asked (96%) opt for delivery to their homes rather than Click and Collect. Most will book their delivery slot at the beginning of their shop and say that cost is more important than the timing of the delivery. Nearly half paid no fee for their last delivery, with 27% qualifying for free delivery because of the value of their basket and 22% using a delivery pass.

The delivery experience is important to customers – it is the only face-to-face interaction they have with the retailer throughout the journey. Of all the shoppers who have been loyal to one retailer in the last six months, almost a third say it's because the delivery drivers are polite and friendly.

WHAT'S THE FUTURE FOR ONLINE GROCERY?

Growth in online grocery penetration has plateaued in recent years. However, it is still forecast to grow strongly over the next five years, with innovations in the market that could attract new shoppers. Frequency is also increasing, driven by retailer investment in lowering delivery charges.

Industry specialists surveyed by IGD expect data to play a much bigger role in the future[6]. They expect the online shopping environment to be personalised to each shopper, with tailored promotions, recommendations and advertising. Artificial intelligence may be able to anticipate shopper demand, connecting with smart devices in the home to predict when products will run out. These developments may help to improve the online shopping experience for consumers. However, the channel still faces challenges around fulfilment and profitability on smaller orders.

Many retailers have trialled partnerships with third party delivery services (e.g. Deliveroo) to offer much faster deliveries of smaller basket sizes. These trials are mostly limited to London but offer delivery within one or two hours, satisfying customers who prefer to shop little and often. Even the discounters (who have been conspicuously absent from online grocery) are exploring this model: Aldi now offers two-hour delivery within London through a partnership with Home Run, who also fulfil orders for Tesco, M&S and Waitrose, while Lidl offers one-hour delivery in parts of Ireland, through the third-party delivery company Buymie.

This model offers retailers an easy and low-cost way to increase their delivery capacity by outsourcing logistics and targeting shoppers who would not typically buy groceries online. However, it is limited to inner-city areas and is not cheap – one-hour delivery can cost upwards of £6.99 and there is usually markup on products.

The retailer also loses control over the only face-to-face aspect of the online grocery process, risking a poor customer experience.

Waitrose has expanded its in-home delivery pilot "While You're Away" which delivers groceries straight into customers' homes. Waitrose installs smart locks onto customers' doors which allow temporary access for drivers at the time of their delivery slot. Drivers wear chest cameras for security and place shopping in customers' fridges, freezers or on counter-tops. The first phase of the pilot delivered to 100 customers in South London and has now expanded to 1,000.

Soon, there may be no need for delivery vans or bikes. Robotics company Starship Technologies now offers delivery from Tesco and Co-op in Milton Keynes using autonomous delivery vehicles. Orders are picked by Starship employees, who load them into Starship's buggies. The buggies can each carry 10 kg of shopping and travel on pavements, with a maximum speed of 4 mph. The company's global network of bots have now completed over 50,000 deliveries.

Figure 14. Starship Technologies' delivery robot

6. The online store of the future. IGD, 2018

SUMMARY OF KEY COMMUNICATION OPPORTUNITIES

Meal planning – Communicate how meats fulfil the fundamental needs of taste, quality and enjoyment throughout the journey, but particularly at the start, to ensure they are in customers' minds before they start their shop.

Shop planning – Tailor communication based on weekday (value, convenience, health) or weekend (treat, experimenting) needs. Ensure shoppers understand how the various meats match these criteria.

Website navigation – Start to focus on quality as a proxy for taste while also making offer and practicality messages clear.

Meat pages – Dial up focus on quality and include inspiration on how to cook, portion sizes and meal solutions.

Purchase and delivery – Ensure key messages on quality and practicalities are communicated in the product listing as most shoppers will add to their basket without visiting the product page.

CONCLUSIONS

Key differences between online and offline

- In store, shoppers at the point of purchase make decisions based on sensory factors like taste and appearance. Online, shoppers use product tier as a proxy, in lieu of close interaction with the product
- A greater share of meat is sold on promotion online. The online environment makes it easier for shoppers to view all available offers and is also favoured by cost-conscious shoppers
- Online grocery has a younger profile of shoppers than other channels, particularly favoured by those with young children
- Dwell times are typically shorter online. Shoppers may find it easier to navigate to the product they want but also typically add to their basket without inspecting the product's detail
- Meat faces specific barriers online. Shoppers express anxiety about not being able to pick the exact pack they want, particularly when it comes to high-value or more variable products

What could be improved

- Improve the display of tier in product listings – this signposts quality for shoppers who can't inspect the product themselves
- Highlight practical aspects of meat products at the point of purchase, e.g. ease of cooking or versatility in different dishes
- Ensure images remain high quality and can be enlarged – product appearance plays a particularly important role for cuts like steak and roasting joints
- Increase the prominence of added-value products. Many shoppers claim not to have seen them online, though are open to trying them. Those who shop online frequently are most likely to be looking for inspiration to break their routine
- The sites that were rated most highly have uncluttered layouts with lots of white space but still contain the necessary information

METHODOLOGY

This report is based on research conducted over the summer of 2019, commissioned by AHDB with Two Ears One Mouth – an agency that specialises in shopper research. This research follows on from a previous study of the in-store shopper journey for meat published by AHDB in 2018, and an older study from 2012.

The research involved interviews of shoppers immediately after completing a typical online shop, as well as observations – where participants filmed their online shop covering up to two proteins per participant. An online usage and attitudes survey also explored attitudes to meat shopping online in general and asked in-depth questions about a recent meat purchase. This allowed a comparison between recalled and in-the-moment behaviour, uncovering differences between what shoppers claimed and what they did.

The sample was representative of the GB population but restricted to those who had shopped online for groceries (including meat) in the last six months. Shoppers were classified as heavy (shop online for groceries once a fortnight or more), medium (every three to four weeks) or light users of online grocery (less than every four weeks).

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AHDB's Retail Insight Team actively analyses retail trends, reporting on the latest sales trends and what they mean for the agricultural industry.

Read more on retail and consumer trends on our website **ahdb.org.uk/consumerinsight** Follow @TheAHDB on Twitter and Facebook, to be alerted to articles as soon as they're published. Or sign up by dropping us an email: **strategic.insight@ahdb.org.uk**

Ask the analyst

If you'd like any more information on the areas covered or have suggestions for future content, then please email us at **strategic.insight@ahdb.org.uk**

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