

IMPROVING SHOPPER ENGAGEMENT WITH THE MEAT AISLE

It's paramount that the in-store environment for meat is improved. The category is hugely valuable, accounting for 14% of grocery spend, and is purchased by 99% of households in Britain (Kantar).

Despite the booming online market in recent years, physical stores still account for 87% of meat and poultry sales. However, previous research from AHDB has highlighted a real challenge with the in-store environment, with only a small proportion of shoppers actually enjoying shopping in the meat aisle. Moreover, pre-pandemic category losses stemmed from those who weren't even making a conscious decision to move away from the category. Evidence indicated that a lack of inspiration in store was a key influence on this.

Therefore, AHDB commissioned research to establish how this could be executed. Conducted by Linney in the first half of 2021, the research streamlined a range of ideas generated in partnership with the industry to develop virtual reality concept aisles. For more information about the methodology, please see page 20. In this report, we explore the findings to see what messaging and imagery resonates with shoppers and how it can be activated in store to attract shoppers into the meat aisle and keep them buying red meat.

KEY FINDINGS

- **The theme of 'inspiration' is a standout in attracting people into the aisle. Utilise this to get shoppers thinking about their meal rather than the product**
- **At shelf, use a range of messaging themes to reassure shoppers of concerns regarding farming and health. Statements highlighting British farming expertise appeal**
- **Health has a role to play on pack, acting as that final reassurance. Vitamin B12 should be the hero, supported by broader health messaging**
- **In store, shoppers navigate the meat aisle by product, assessing product quality and reiterating the importance of taste and appearance. Packaging design should be elevated without compromising the visibility of the product itself**
- **Utilise point of sale (POS) that disrupts at the point of purchase, with space savers and large shelf strips holding strong appeal. Aisle fins have an important role to play to attract people into the aisle**
- **These findings hold universal appeal, regardless of where shoppers usually buy their meat – supermarket, discounter, premium or convenience**

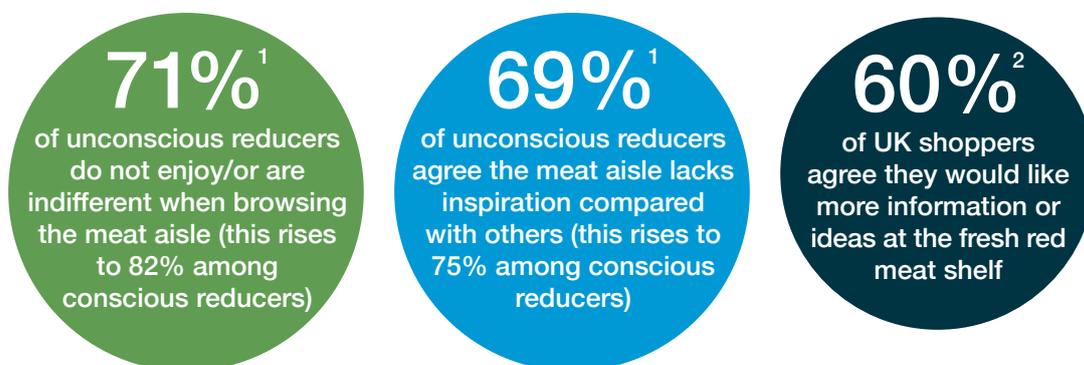


BACKGROUND

It is integral for retailers to get the fresh meat, fish and poultry (MFP) aisle right. According to Kantar, 99% of GB households have purchased fresh MFP in the last year (52 w/e 13 Jun 21), with a value of £18.5bn. This accounts for 14% of grocery spend.

The coronavirus pandemic led to more in-home meal occasions resulting in significant sales uplifts for retailers. MFP volumes have seen 4.7% growth in the last year (Kantar, 52 w/e 13 Jun 21). However, pre-pandemic, they were in decline, with MFP shedding 1.3% of volumes by February 2020 from its peak in November 2018, and for red meat, the picture was even starker at -2.5% year-on-year. At the same time, negative media pressure on meat was growing. As we come out of the pandemic, AHDB predict retail sales will slow (please see [AHDB's Agri-market outlook](#) for more detail), and media pressure will rise, so now is the time to address these pre-pandemic losses.

So, what was the issue? Research carried out by AHDB showed that **unconscious meat reducers** accounted for 99% of pre-pandemic losses. These are consumers who are not actively trying to reduce their meat consumption but are unconsciously buying less meat when shopping. The report highlighted that unconscious meat reducers, along with those actively reducing their meat consumption, lacked engagement with the aisle.



Source: ¹AHDB/Kantar Meat Reducers Report, 52 w/e 26 Jan 20; ²IGD

There are clear in-aisle visual and messaging opportunities based on what is important to the meat shopper. We know from AHDB's **meat shopper journey** that price, taste and convenience are the top purchase drivers at the point of purchase. Therefore, meal inspiration is key. We also know that industry reputational factors are becoming increasingly important. Health is the number one reason consumers reduce their meat consumption (AHDB/YouGov Tracker, May 21), but two in five unconscious meat reducers also cite health as important to them. Those who look for the environmental or welfare impact of food is just less than a quarter among unconscious meat reducers but rises to 42% among conscious meat reducers. Lastly, 28% of consumers claim they are concerned the food they are buying is British (AHDB/YouGov Tracker, May 21), and with trust in British farming high, now could be the time to dial this up in store.

So, with all these different visual and messaging opportunities, what does an engaging meat aisle look like?

THE OPTIMAL PATH TO PURCHASE

When it comes to changing perceptions of the meat aisle, there is no silver bullet. At different moments in time throughout the path to purchase, a mix of communication messages is necessary to help address the various concerns shoppers have, when it comes to red meat. This will reassure people at their moment of purchase and also support longer-term perceptions of the category.

There are three key milestones in this path to purchase:

- Attracting shoppers to the aisle
- Engaging them with the red meat fixture
- Converting them to purchase

Our research showed that for each of these moments in the path to purchase, there is a leading communication route for each of them.



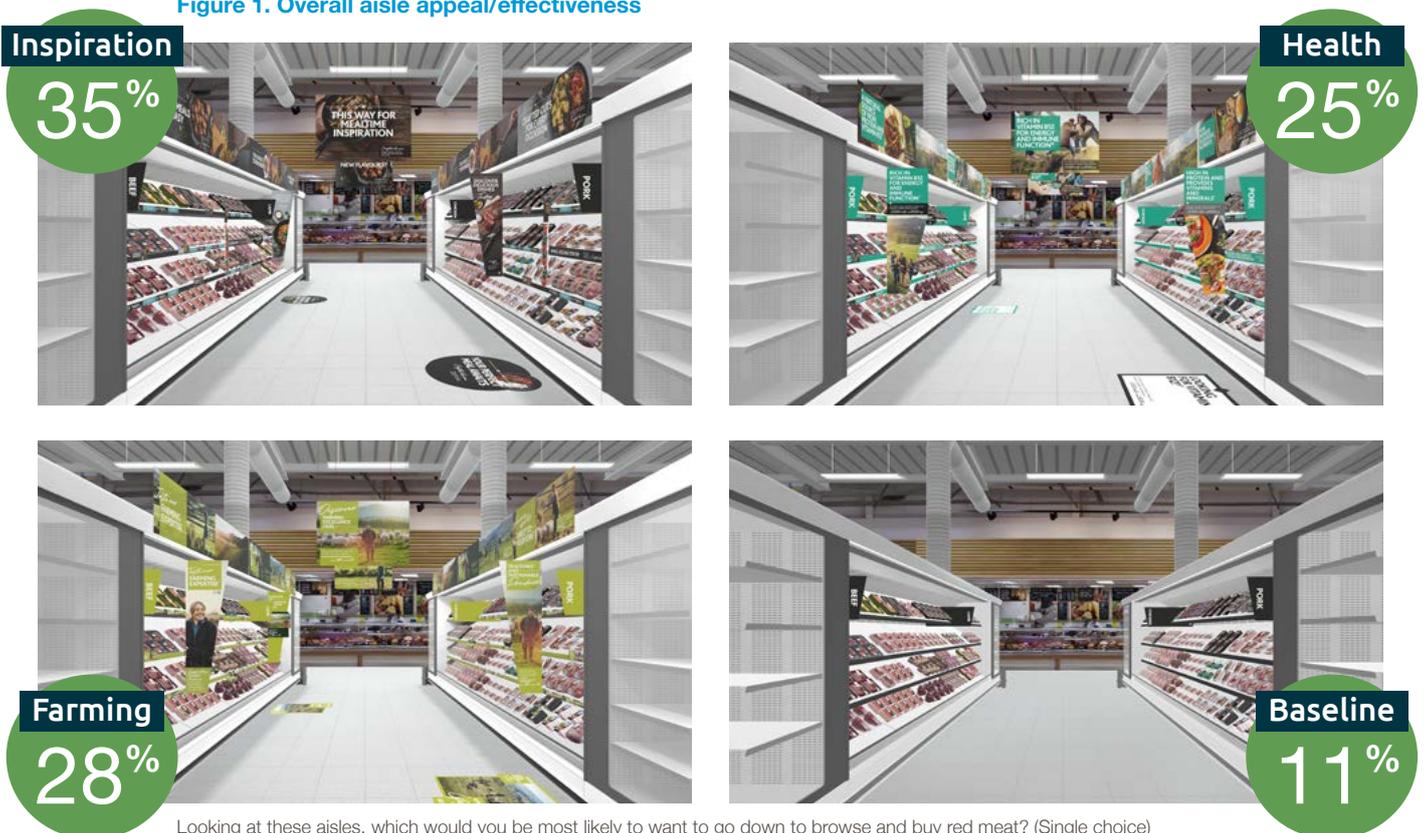
However, there is a need for these routes to work together and not be viewed in isolation. This idea of mixed messaging came up spontaneously with respondents, with some of those viewing the **health** aisle mentioning the role of local sourcing and those who viewed the **farming** aisle asking for more recipe inspiration.

Let's go through each stage in a bit more detail.

Attract to aisle

When given the option to pick between our four concept aisles, inspiration emerged as the most effective route at encouraging people to enter the meat aisle.

Figure 1. Overall aisle appeal/effectiveness



Looking at these aisles, which would you be most likely to want to go down to browse and buy red meat? (Single choice)

This rank of appeal was generally universal, regardless of where shoppers mostly bought their meat – supermarkets, discounters, premium retailers or convenience.

“
It's very helpful in one way as some people have no idea how to cook meat properly so this would be ideal

“
Sometimes I'm put off buying certain cuts if I'm not sure how to cook them – so info would be great

“
You will begin to reduce the stress I feel shopping for expensive meat

The slight nuance to this lies in premium retail, where shoppers also say farming strongly attracts them to the aisle, at the same level as inspiration. These shoppers are a prime audience for new initiatives such as these, as they are shown to be highly receptive to new concepts throughout testing.

What had the most positive intuitive appeal for all shoppers was the foodie imagery. This meant that people were already less focused on buying a product and more focused on creating a meal. This further builds on the importance of meat in growing basket size, with Kantar Usage data suggesting that when meat, fish or poultry is bought from a retailer, that retailer will own £3 in every £4 spent on consumers' plates.

As an aisle, 36% of shoppers agreed that the **inspiration** concept had the most engaging/enticing images, compared to 30% for **farming** and 22% for **health**. The aisle resulted in improved perceptions for the category in terms of being inspirational and exciting. The latter being particularly important when challenging the current low level of engagement with the aisle.

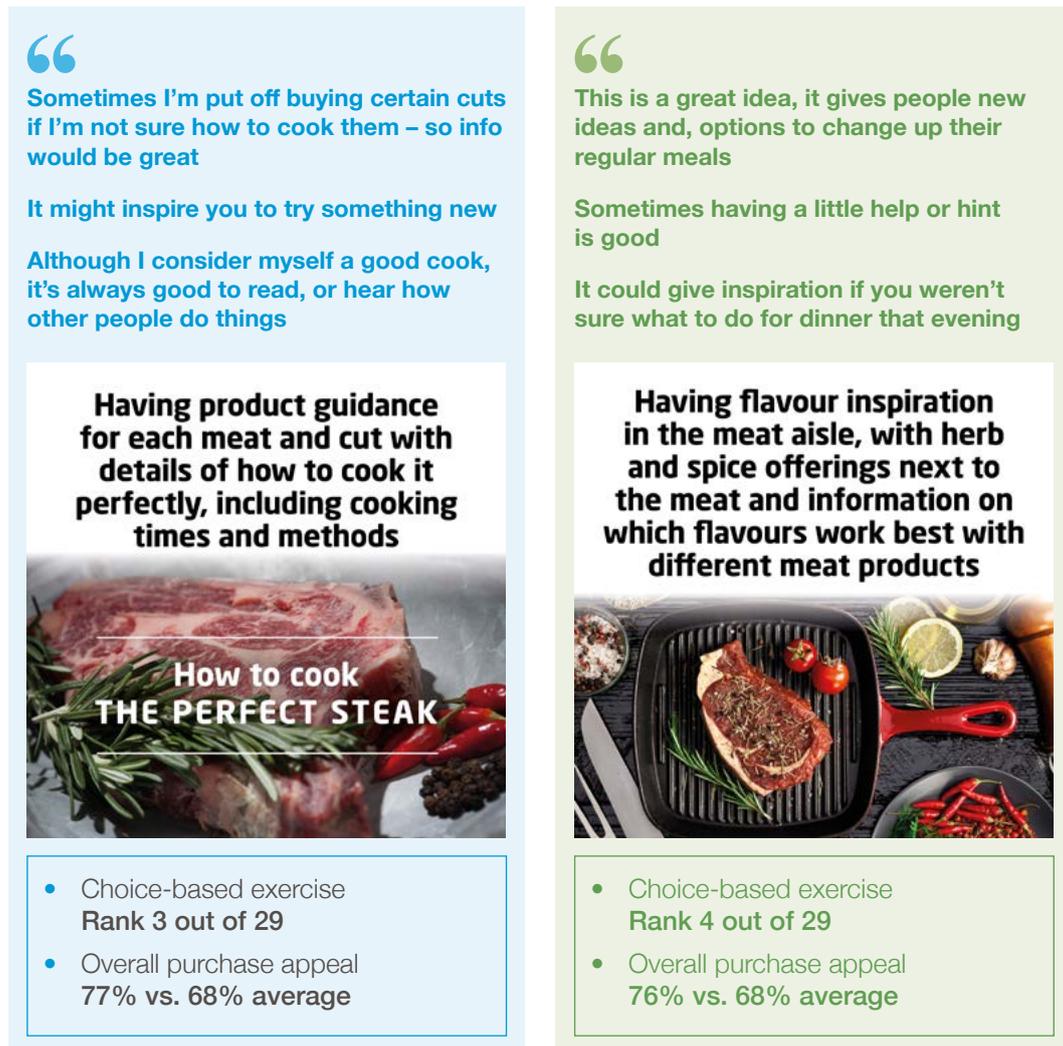
Not only did the images work alone, but they also had an important role in raising the efficacy of certain messages. One example is the statement 'Showcase your steak'; as a message alone, this resulted in 19% of shoppers saying it would make them extremely likely to visit the aisle and buy red meat. This rose to 26% when accompanied by an image.

Figure 2. Percentage of shoppers who are extremely likely to visit the aisle and buy red meat based on the statement/image



However, inspiration can mean a whole raft of things to both industry and shopper. From Stage 1 of testing, it was identified that ideas around confidence, accessibility and experimentation would be most positively received – not just with novice cooks but also those already established in their cooking skills and routines.

Figure 3. What should inspiration look like?



These two ideas not only worked well in isolation, they had a strong correlation in terms of propensity to buy, at 49% (compared to an average of 38%), indicating they would work harmoniously to attract shoppers to red meat.

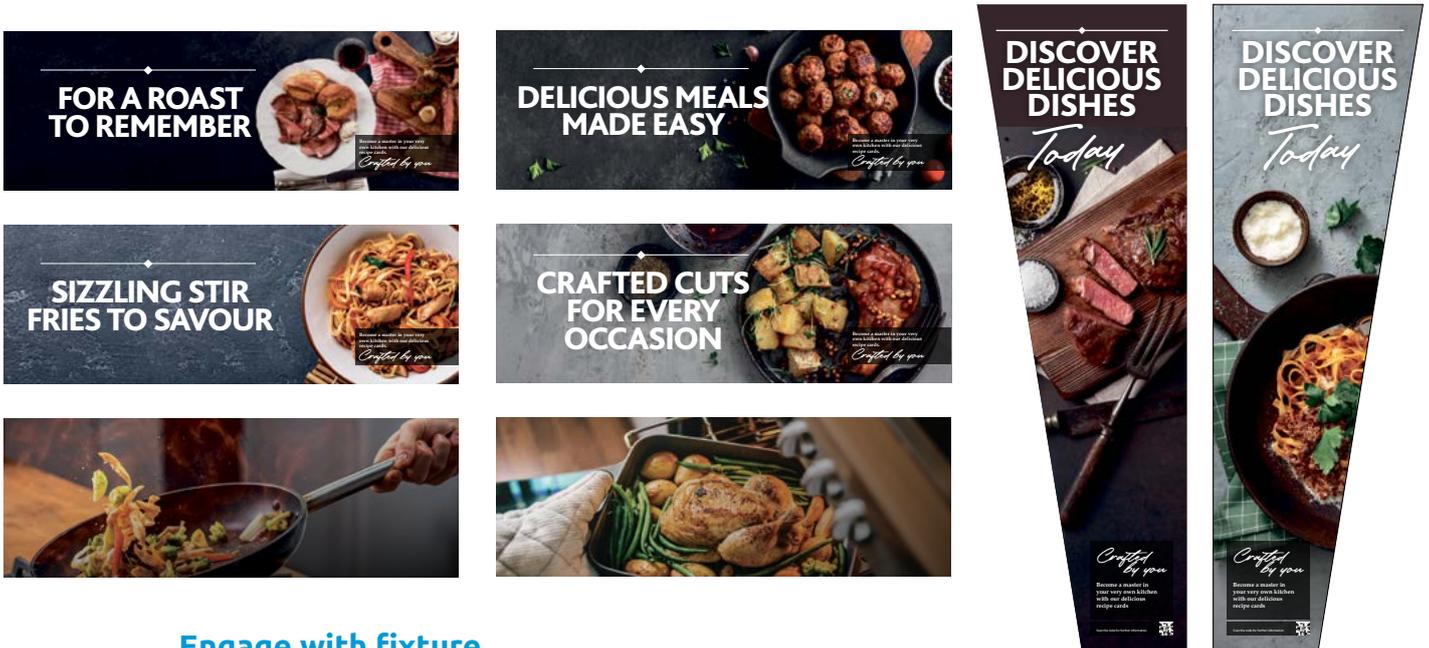
Inspirational ideas that scored less well include arranging cuts of meat and products by the speed of cooking (from quick and easy meals to low and slow cooking) and using imagery of midweek meals through to weekend treats. Based on this initial stage of testing, it was identified that the confidence-giving concepts above were indirectly providing these different meal ideas to shoppers without being explicit.

While **inspiration** as a route clearly has a real strength in achieving that initial engagement with the meat aisle, there was an important learning from the **farming** designs in the form of colour. It emerged that the earthy green used in testing had positive, intuitive associations, namely with health, naturalness, and quality. This green cue and these subconscious associations meant that people related it to the outdoors and green fields, which built this idea of quality and good supply chain relationships.

Activating this in store

When it comes to which POS does the best job of drawing people in, both heat mapping (where shoppers selected which areas of the aisle drew their attention) and eye-tracking exercises (which corroborated this by tracking where they were looking) identified aisle fins as having an important role to play. In the eye-tracking, we recorded the level of fixation (being how much attention an asset has received) on the aisle fin at 79%, which compares

to an average for all assets of 41%. The other POS that has an important role in setting the overall tone for the aisle is header boards. While they had a lower level of fixation than the aisle fins, recall later was much higher, at 33% versus an average of 21%.



Engage with fixture

Farming communication emerged as the most effective route for engaging shoppers with the meat fixture, alongside elements of inspiration. Farming's strength comes in the form of supporting the longer-term image of red meat. While Inspiration was able to lift some category perceptions, farming built on this, delivering on even more elements.

Figure 4. Significant increase in agreement with statement versus average

	Health	Inspiration	Farming
Reassures me that red meat from the UK is among the most sustainable in the world	✓	✓	✓
Encourages me to buy from the red meat aisle	✓	✓	✓
Creates an engaging shopping experience	✓	✓	✓
Made me feel more positive about the red meat aisle	✓	✓	✓
Encourages me to visit the red meat aisle		✓	✓
Encourages me to try new cuts or types of red meat		✓	✓
It's an aisle I'll look forward to visiting		✓	✓
Would give me confidence to try new meat-based recipes			✓
Would get me thinking about new things I can buy and cook			✓
Encourages me to use red meat as part of my balanced diet more often	✓		

How much do you agree or disagree with the following statements, based on the aisle that you have seen today?

✓ Represents a significant increase in the perception, c. 3%+

Not only this, but it was able to complement some of the category associations that **inspiration** delivered. Where **inspiration** delivered on quality, exciting and inspirational, **farming** was able to significantly increase perceptions such as local, sustainable and reassuring.

Figure 5. Significant increase in perception of the meat aisle versus average

	Inspiration	Farming
High quality	✓	
Tasty		
Healthy		
Local		✓
Convenient		
Sustainable		✓
Relevant		
Exciting	✓	
Reassuring		✓
Inspirational	✓	

Which of these words do you think this aisle represents?

✓ Represents a significant increase in the perception, c. 3%+

These findings line up with our [trust and transparency research](#) which has shown that consumers see farmers as the most trustworthy group within the supply chain. While the increased sustainability perception is also likely to tie into this – this same research highlighted that farmers were deemed to be the best at caring for the planet.

In terms of what **farming** could convey in store, there is greater complexity compared to **inspiration**, as regulatory considerations start to come into play. For example, messaging around food miles came out well in a choice-based exercise; however, making the link between environmental benefits and/or taste could not be proven on an average, national level.

A note regarding plastics

When the concept of reduced plastic packaging in the meat aisle was put to consumers, it achieved a high level of appeal, with respondents seeing it as an important move for all retailers and across all industries. However, despite there being a clear desire, as highlighted in our [trust and transparency research](#), it is becoming a necessity for shoppers and therefore wouldn't generate the same level of new news in the in-store environment as other farming and environmental messages. Nevertheless, as industry creates and launches reduced plastic packaging, it should be called out.

The environmental message that came out strong was providing information on how red meat from the UK has lower emissions than other countries and is among the most sustainable in the world. This gave shoppers a degree of reassurance, with 69% feeling positive about the meat aisle, significantly higher than the average for environment and farming concepts. This idea also had a strong intuitive appeal in that people responded

quickly to this idea – an important aspect for the in-store environment where there are only seconds to influence purchases. This could be complemented further by showing how supermarkets are working with farmers and supporting them. The traditional image of a farmer outdoors was particularly well received.

While farming imagery performed well, the fixture shouldn't be devoid of inspirational food imagery, and there is more information on this in 'Top tips'.

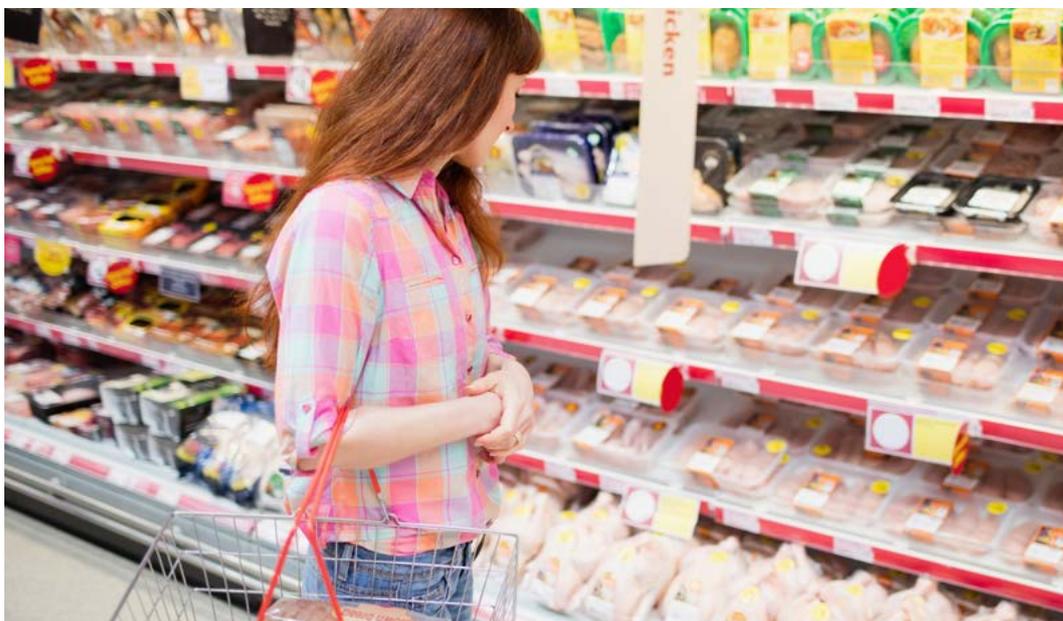
Discounter shoppers responded well to this idea around how their stores are working with farmers. In addition to this, they were interested in more information on the UK having world-class farming standards.

Activating this in store

To ensure in-aisle messaging around farming and the environment is engaged with, this must be in shoppers' line of sight. Eye-tracking identified that shoppers orient themselves in the aisle by product, checking the product quality, as well as the packaging around it. Therefore, the ideal moment to disrupt is at the fixture itself. POS that tested well included 'space savers', which take up space on the shelf and sit where a product might. This sort of asset has been utilised by the likes of Sainsbury's when promoting new products or gondola ends and certainly grabbed attention in our testing. This was echoed for our larger shelf strips – which ran across the shelf edge with one clear message.

Figure 6. Eye tracking results for space saver and large shelf strip

		Fixated	Dwell time per single asset	Recall
Space saver →		56%	1.1 sec	42%
Large shelf strip →		54%	1.3 sec	33%
Average – all assets		41%	0.8 sec	21%



While our virtual aisle did not include pricing shelf tickets, there is an opportunity to utilise any unused space behind the prices. Importantly though, consideration must be given to cognitive overload if there are many SKUs and price labels, so it's crucial to choose the shelves wisely.

Purchase product

Health messaging has the potential to grow basket size, acting as a final reassurance and giving people permission to eat. In our purchase exercise in Stage 2, which allowed shoppers to add products to their virtual baskets, shoppers in the **health** concept aisle increased the number of items by 4% compared to the baseline aisle. While **inspiration** also delivered a significant uplift in this exercise (+5%), it must be remembered that health is an important concern to address.

In the purchase exercise,
average basket size increased by 
4% in the health aisle
(when compared to the baseline aisle)

For discounter shoppers, their basket size increase for **health** was more pronounced when compared to the basket size for the **inspiration** concept aisle. More functional messages of health credentials and farming credentials are effective with discounter shoppers.

Health can mean a number of different things to people, whether that's opting for more natural, less processed products, through to specifically choosing items for particular vitamins and minerals. This means that general messaging around how beef, lamb and pork are a good source of vitamins and minerals does appeal to shoppers, with 76% of shoppers saying it would encourage them to buy red meat from the supermarket. However, details on vitamin B12, including how it helps support a normal immune system, or helps reduce tiredness and fatigue, can create a tangible consumer benefit, which was well-received by shoppers in testing. These two concepts (general vitamins and minerals and specific health benefits of B12) had a strong correlation in the propensity to buy metric, at 60% compared to an average of 38%, indicating they could be harmonised for use together in-aisle.

“

It's a very helpful reminder whilst out shopping. Helps to decide what to buy and when

“

It is a good idea to know about what vitamins are in your food

A note regarding health claim regulation

Messages used as stimuli in this research are not confirmed as being within advertising regulations. Organisations may need expert and/or legal advice when deciding which claims to make on pack or in store.

Activating this in store

As the final stage in a shopper's path to purchase, packaging and front of pack labelling will have a key role to play. In the eye-tracking exercise, our qualitative group of shoppers spontaneously reported that QR codes would be a reassurance to them. They specifically spoke about accessing content at home, rather than in store, to provide in-the-moment help when about to cook. This content could be the whole cooking process or just some aspects (e.g. how to prepare the sauce), and health credentials could be woven in.

It is important that QR codes have a call to action, such as 'scan here for healthy recipe ideas', so that shoppers are aware the QR code is for them. While they often have a relatively low scan rate, the role they can play in providing reassurance, even without scanning, should be kept in mind.



Summary

Therefore, the leading communication route for the key milestones in the path to purchase are:



TOP TIPS FOR EXECUTION

The results in the previous section show the hierarchy of messaging needed to make a positive change in the meat aisle. The research shows areas of best practice and learnings which can be used to implement change within the aisle or support future research.

These top tips fall within three categories:

- The type of POS to use
- The language and content used on the POS
- The imagery and colours used within the aisle

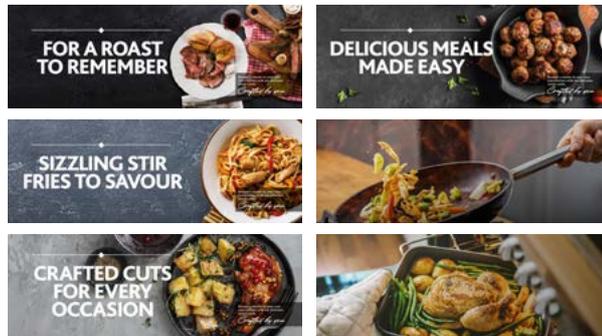
Point of sale (POS)

Through eye-tracking technology, we can see which POS were the most viewed by shoppers, which held their attention, and which proved most memorable.

Within the research, up to 12 pieces of POS were tested per concept aisle. These ranged from large ceiling hangers and floor vinyls to small shelf edge labels and stickers.



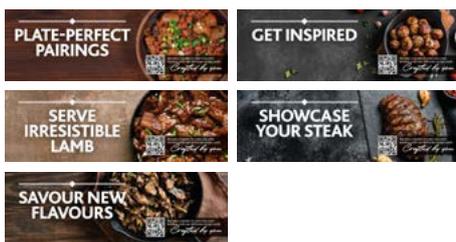
Ceiling hangings



Bay headers



Floor vinyls



Barkers



Space savers



Aisle fins



Herb clip strip headers



Shelf strips



Large shelf strips

Fixated

In terms of which POS most shoppers looked at, aisle fins came out as the most viewed, at 79%. Aisle fins, space savers and large shelf strips all performed well, as did most items situated within the bay. Shoppers' viewing of the products meant those situated next to the products themselves had the highest number of views. Therefore, if there are limits on the number of pieces of POS you can use, or you have a key message, POS next to products, or at eye level, would be most successful.

Dwell time

The POS which held shoppers' attention for the longest was the herb clip strip, which gained the longest view time at 1.7 seconds, more than double the average 0.8 seconds. While the clip strips were noticed by the least number of shoppers, those who did notice were very engaged. Therefore, they would prove useful when looking to engage with shoppers for longer in specific bays or with certain products.

From reviewing eye-tracking, space savers were particularly good at disrupting shoppers from their normal shopping behaviour. There are examples of this type of POS being successful when used in categories such as dairy and coffee, where product space is given away to the POS. However, if space was at a premium, spring-loaded space savers could be explored, pushing the image forward as the product moves out of stock.

Recall

When shoppers were asked to recall POS after viewing a virtual aisle, space savers were the standout performer at 42%. This ties back to the view and dwell time data being much higher than the average. A third of shoppers also remembered the large shelf strip and header, with only 22% of shoppers actively viewing the latter. This shows that while many do not actively engage with the headers, they are in the peripheral vision of many and set the scene for the aisle. Therefore, their role should be complementary and mainly visual to support the main message of the aisle.

Figure 7. Eye tracking results

POS	Aisle fin	Space saver	Large shelf strip	Shelf edge	Ceiling hanger	Barker	Floor vinyl	Talker	Header	Herb clip
Fixated	79%	56%	54%	42%	42%	38%	29%	25%	22%	19%
Dwell time*	1.0	1.1	1.3	0.6	0.5	0.5	1.0	0.3	0.4	1.7
Recall	17%	42%	33%	25%	21%	23%	17%	0%	33%	0%

*Dwell time – seconds per single asset

POS best practice

- Packaging needs to attract
- Space savers disrupt
- Aisle fins entice people in the aisle
- Large shelf strips work better than small
- Headers set the scene for the aisle
- Use a specific call to action

POS learnings

- Many POS can overwhelm
- Repeated messaging can disengage
- Use on-shelf QR codes for reassuring on farming quality
- Use QR codes on the pack for health and inspiration

Messaging

When asked which message consumers preferred, many said the health messaging was the most engaging/enticing. This shows that in comparison to farming and inspiration, the health messaging packs the biggest punch with shoppers, and therefore needs to be at the purchase moment on pack.

Figure 8. “The wording/information was the most engaging/enticing”, Net agreement (single choice)



Statements were tested with shoppers within each of the three areas to see which messaging within each route was the most engaging for shoppers.

Health

For **health**, most of the ideas were well-liked. As shoppers are receptive to multiple health messages, a mixture of different vitamins and minerals, including the benefits, would be useful. Health messages reassured consumers on the quality of meat as well as telling them something new.

“
How the meat contains B12 and vitamins/proteins and what’s presented in front of you are good quality

“
Appreciate the added information about the products, vitamins, minerals etc. Also what they do for you. Would like to see stores with this

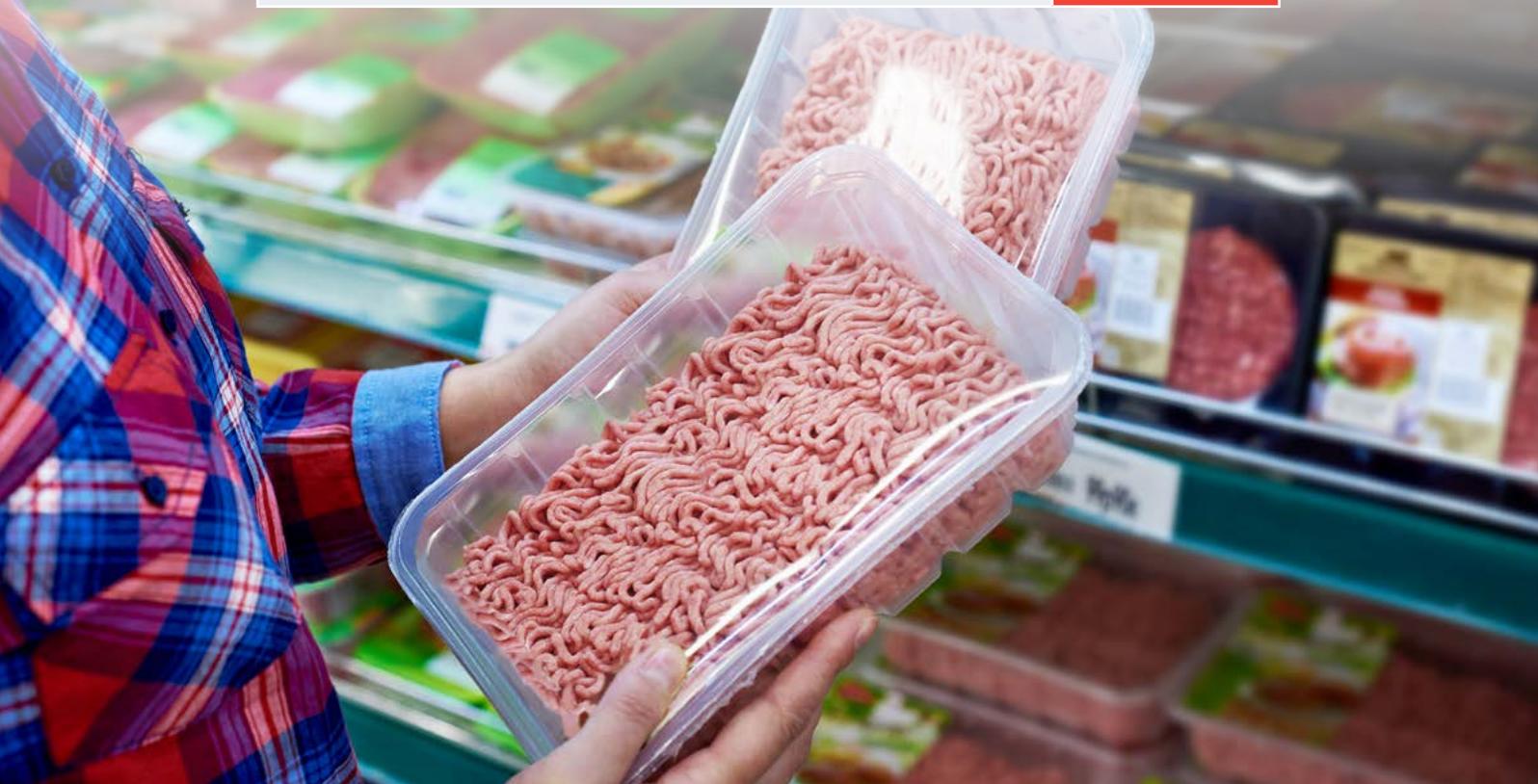
% extremely likely to encourage you to visit the meat aisle and buy red meat	
High in protein and provides vitamins and minerals	26%
Rich in protein and vitamin B12	25%
A natural rich source of vitamin B12	25%
A natural source of iron, protein and vitamin B12	24%
Naturally nutritious and protein packed	24%
Enjoy the benefits of vitamin B12	23%
Reduce tiredness and fatigue with vitamin B12	23%
Naturally nutritious	23%
A naturally nutritious source of vitamin B12	23%
Naturally rich in vitamin B12	23%
Provides up to 10 essential nutrients	22%
Discover a great source of naturally-nutritious protein	21%

Farming

While the **farming** statements were very polarised, 'Supporting UK farming expertise' was the most liked across all statements tested, including **health** and **inspiration** – proving that 'backing British' is an important message for shoppers. Previous shopper journey research revealed that British had become a less important purchase driver and was not enough to entice a sale. But it's clear that consumers need to be given a tangible benefit to buying British; in this case, expertise as a marker for quality and local.

Statements that linked farming with taste performed poorly, proving that while **inspiration** and **farming** messaging are important within the aisle, they should complement each other rather than blend the two into one message.

% extremely likely to encourage you to visit the meat aisle and buy red meat	
Supporting UK farming expertise	30%
Supporting a lifetime of UK farming	26%
Traceable and sustainable produce	24%
Among the most sustainable in the world	24%
Enjoy traceable, sustainable produce	24%
Sustainability from field to fork	24%
British red meat is among the world's most sustainable	23%
Excellence from field to fork	23%
Discover the difference	22%
Farm to fork excellence	22%
Farming expertise direct to your fork	21%
Taste our farming expertise	21%
Taste a lifetime of dedication and expertise	20%
A lifetime of dedication on your plate	18%



Inspiration

Most messaging was liked but lacked the top appeal seen for inspiration with imagery included. Descriptive wording, which gives shoppers confidence, is key for inspiration and makes the dishes attainable to the average shopper.

% extremely likely to encourage you to visit the meat aisle and buy red meat	
For a roast to remember	24%
Serve something special	23%
Delicious meals made easy	23%
Discover delicious dishes today	23%
Get inspired	21%
Serve irresistible lamb	21%
Sizzling stir fries to savour	21%
Fresh herbs and ideas	21%
Your perfect meal awaits	20%
Crafted cuts for every occasion	20%
Tantalise those taste buds	20%
Simple, sizzling stir fry	20%
Showcase your steak	19%
Make mealtime an occasion – every time	19%
Plate-perfect pairings	17%

Messaging best practice

- Messaging needs to be simple and clear
- Hero British products and farmer's expertise
- For health, give specifics and show the benefits
- Mix and match several health benefits
- Inspiration should be attainable. Use wording to give confidence
- Imagery needs to be paired with quality messaging

Messaging learnings

- Inspiration and farming should complement rather than blend
- A company or spokesperson was not appealing
- Assurance schemes can reassure
- Make health seem tasty, not bland
- Environment needs detail and simplicity

Imagery and colour

Inspiration really stands out on image preference and, when done right, can bring the aisle to life. Tasty food imagery instantly attracts shoppers and draws them into the aisle. The health aisle also contained imagery of food but was liked less by shoppers, showing that it is imperative that the food still looks tasty when conveying a health message. However, tasty food should not be unachievable for the average cook or look too much like restaurant food. For example, black backgrounds with food imagery can give a premium feel, but this may put off some shoppers.

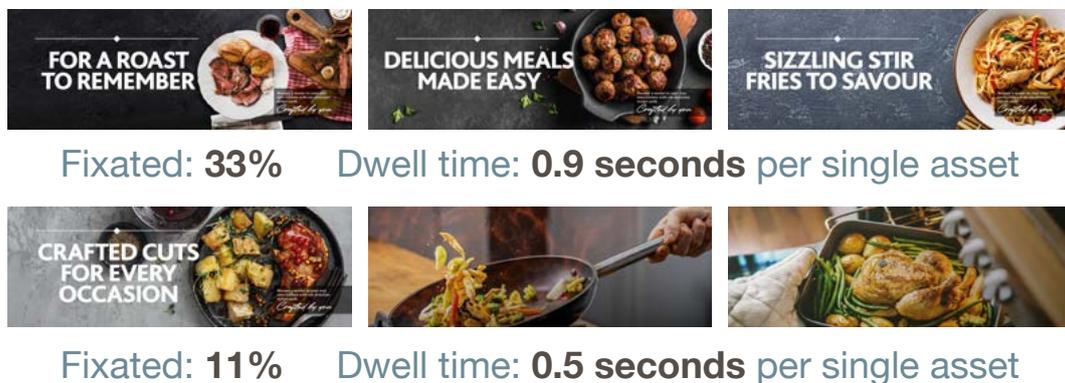
Figure 9. "The images were the most engaging/enticing", Net agreement (single choice)



Foodie imagery has amazing power to engage shoppers with your message. As mentioned earlier, when food imagery is paired with inspiration messaging, it boosted the likeability.

However, imagery alone is not enough. When looking at the POS interaction in more detail, the headers which had both imagery and a high contrast message had more views and a longer dwell time than food imagery without a message or a message which had a lower contrast to the background.

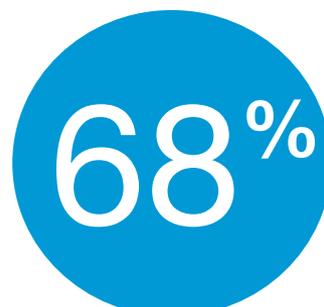
Figure 10. Eye-tracking results for headers



When navigating the aisle, although imagery is important, actually seeing the meat itself is most important for shoppers to assess quality. It is important to consider this when planning more engaging and colourful packaging and labels.

For farming imagery, consumers like the idea of a traditional farmer out in the field with a flat cap. Imagery of farmers looking after animals indoors was less popular. Having farmer imagery was also preferred to only British countryside or just animals.

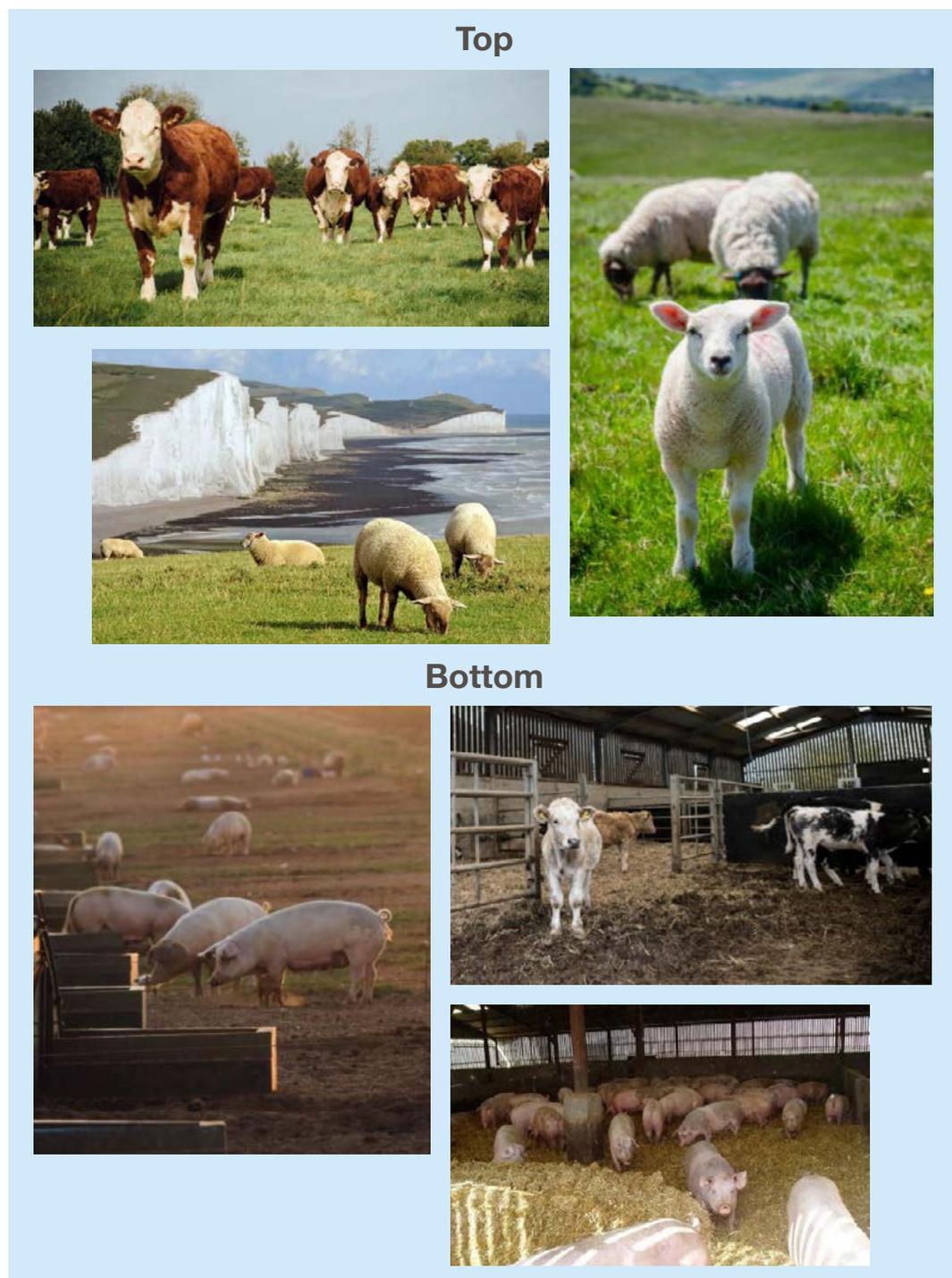
Figure 11. Percentage who liked the image



Taking the traditional farming imagery through to virtual reality was essential to convey the British idea alongside other messaging. It proved popular with shoppers, who linked the imagery with sustainability and health. However, the main takeaway for many shoppers was the quality of the meat, with many citing farmers working closely with the retailers as reassuring and a sign of excellence.

Consumers were asked about their preference for animal imagery within farming. However, it is important to note that this was not questioned within the context of the meat aisle (as with other parts of the survey). Images that were preferred included cows and sheep outdoors in the British countryside, as opposed to animals indoors and pigs, even outdoors. However, the research later went on to highlight the importance of the interaction between copy and image and therefore any image use should be considered within broader context, and not in isolation.

Figure 12. Top and bottom ranked animal imagery



The colours that shoppers found the most engaging were found in the **farming** aisle, very closely followed by **health**, with both using shades of green.

Figure 13. “The colours were the most engaging/enticing”, Net agreement (single choice)



Green conveys subliminal messages of health, natural and sustainability for shoppers. It is usually associated with goodness and positivity and encourages shoppers when at fixture.

This colour could be used in a variety of ways, from small flashes of colour on other POS, to shelf covers. However, as with all suggestions here, further testing should take place to ensure it enhances red meat sales and perceptions.

Imagery and colour best practice	Imagery and colour learnings
<ul style="list-style-type: none"> • Use foodie imagery to attract • Imagery needs to be attainable • Healthy dishes need to look tasty • Imagery makes messaging more powerful • Use images of traditional farmers • Contrast imagery and text • Colour in the aisle makes it inviting 	<ul style="list-style-type: none"> • Images of farming indoors did not perform well • Dark colours convey premium • Shoppers like to see the products, so don't cover them with labels

CONCLUSION

The reasons why people reduce their meat consumption are complex, and our previous research has shown there is a huge problem with shoppers gradually moving away from red meat without even realising it.

This latest research highlights a range of messaging is required in order to address these issues, as well as help build longer-term perceptions of the category. Themes of inspiration, health and farming/environment will not work in isolation, but when used coherently in store, can help to alleviate shopper concerns whilst, importantly, enticing them into the aisle to begin with.

While this project focuses on the in-store environment, the signals suggest that some messaging, particularly related to farming, has a role to play in building longer-term perceptions of red meat. This can be further amplified by ATL marketing, such as AHDB's Eat Balanced campaign, where this positive external noise and improved in-store environment can work hand-in-hand to boost the fortunes of the category in future.

Using all of these learnings together and combining them into one gave a potential final design of what a new meat aisle could look like. However, retailers and processors will likely want to put their own spin on the ideas.



METHODOLOGY

This report is based on research conducted in the early part of 2021, commissioned by AHDB with Linney Insight – an agency that specialises in shopper research. To answer the brief on how to re-engage consumers with the meat aisle, the research took a 3-stage approach.

The purpose of stage 1 was to streamline 29 messaging concepts which AHDB had defined with the help of industry stakeholders. These 29 concepts sat across four main themes important to shoppers: meal inspiration, health, environment and sustainability and British farming. The research involved 1,000 grocery shoppers being presented, via an online survey, with the 29 concepts as ideas to implement in the meat aisle. A series of time-based perception questions were asked as well as statistical choice-based trade-off analysis and correlations, whittling the 29 concepts down to best performing (whether that be an existing concept or a new harmonised one).



Example of concept from stage 1

The purpose of stage 2 was to take three successful concepts from stage 1 to scenario testing in a realistic consumer shopping exercise using online virtual reality (VR). The Linney design team mocked up three meat aisles based on these concepts, as well as a baseline (plain) aisle for comparison. Four thousand grocery shoppers were split across the VR aisles to roam, complete a purchase exercise and feedback. VR was chosen to immerse the shoppers in the experience allowing us to detangle actual shopping behaviour from claimed.

The purpose of stage 3 was to take one concept aisle and get a deeper understanding of POS activation. Twelve grocery shoppers were immersed in the aisle via a laboratory eye-tracking experiment. The shoppers were able to browse the aisle, allowing us to observe how they navigated and interacted with different POS – ultimately highlighting what activation has the greatest potential to influence.

Throughout the research, the sample was nationally representative of shoppers who were either fully or jointly responsible for the grocery shop and would consider buying meat, fish and poultry. The sample sizes in stages 1 and 2 allowed for analysis across key demographics and retailer types.

The findings from all three stages of the research were used to get to the final recommendations in this report.

To see all concepts, or to find out more about the methodology or results, please contact the team at strategic.insight@ahdb.org.uk





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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.

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