CONSUMER INSIGHTS

October 2018

THE MEAT SHOPPER JOURNEY

A frequently asked question for AHDB is 'what really drives consumers to buy particular products?' In recent years, we have seen the impact of convenience and health on the traditional red meat category and changing market conditions lead to a change in buying behaviour.

We know that what shoppers say and what they do in-store isn't always the same, but what drives people to buy one particular meat or cut above another?

This report provides a holistic view of meat-purchasing behaviour, linked to the different stages of the shopper journey. We explore pre- and in-store influences across different meats, cuts and shopper missions; helping to define and refine retailer and producer strategies to improve category performance.

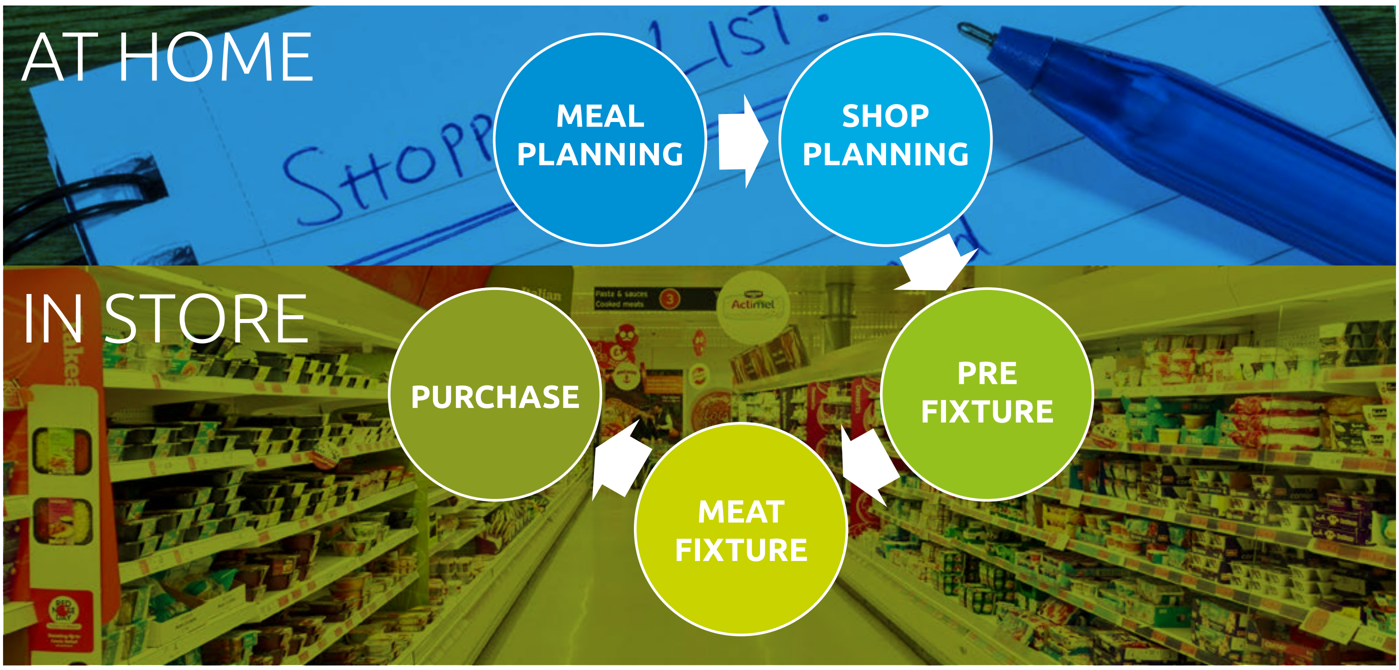
The report is based on research commissioned by AHDB with Future Thinking, a specialist in shopper research, during summer 2018. It follows on from a 2012 study that provided valuable insights on meat purchasing behaviour; however, it is important to revisit this topic as the retail market and consumer behaviour evolve.

Through this research, we have been able to gain valuable insights into the decision-making process of shoppers when buying meat. What is clear is that overall drivers remain consistent, with price, taste and quality being key, and an opportunity still lies in giving the consumer a clear reason to choose British assured meat. Understanding these priorities and when they are most prevalent allows us to improve and maximise opportunities for category growth.

The report findings are based on the shopper decision journey from meal planning to purchase. For meat, the structure of the journey is:

KEY FINDINGS

- **Many shoppers plan their meals in advance, so it's important to make sure meat is top of mind when at home**
- **Tailor communication for meats and cuts to meet different weekday and weekend needs, while also communicating taste and quality**
- **Half of shoppers are flexible with their shop plans, so use opportunities to influence their buying decisions in-store**
- **Taste, enjoyment and convenience are key, so imagery and communication need to focus on both at point of purchase and on pack**
- **Price and promotions play a big role in decision-making and lead to shoppers spontaneously buying different meats and cuts in-store**
- **Quality and welfare marks are not yet well enough understood, so education is key**



AT HOME – MEAL PLANNING

Planning the weekly meal shop is the norm for 69% of shoppers. The biggest sources of foodie inspiration include recipe books (27%) and cooking websites (24%), followed by cooking shows on TV and recipes found in magazines.

Certain criteria apply when deciding what meal to cook. A total of 67% of shoppers consider taste, 59% quality and 42% suitability for the whole family. But, while shoppers say taste is the number one priority, that criteria alone will not guarantee a sale. There are many other priorities, which differ depending on whether the meal is for a weekday or the weekend. With weekday meals, shoppers think more about value, ease, convenience and health compared with the weekend, when treating and experimenting are more of a focus.

ALWAYS	% of respondents
Tasty	67%
Good quality	59%
For the whole family	42%

DURING THE WEEK	% of respondents
Good value	61%
Easy to cook	58%
Convenience	56%
Healthy	47%
Quick to cook	47%

AT THE WEEKEND	% of respondents
A bit of a treat	47%
Something a bit different	35%
A bit of a challenge	21%

Figure 1. Meal planning – decision criteria

Source: AHDB/Future Thinking, Protein Shopper Journey Research, July 2018
(Q – What would you think about when deciding on what to cook? Base 751)

Our study showed that, for meat eaters, choosing the type of meat is the main driver when planning their meals. A total of 65% specify 'meat' as key to their decision-making process compared with the second biggest driver, which is 'ingredients already available' (52%), and 'type of cuisine' (46%). It is therefore essential that meat measures up to the meal-planning decision criteria, to be considered an option and make it onto the shopping list.

PERCEPTION

Unsurprisingly, perception of meats and cuts varies, meeting meal-planning decision criteria in different ways:

Chicken (particularly breasts and diced) is the best solution for weekday meals, due to perceived good value and health. But high usage in the week may hinder use at weekends as it is no longer viewed as a treat.

Healthy 1 · For the whole family 1 · Good value 2 · Treat

Pork (strongly associated with chops) also scores well on good value, easy to cook and has an advantage in taste over other meats. However, perceptions on the healthiness of pork and 'for the whole family' may hinder its use in regular weekday meals.

Good value 1 · Tasty (with lamb) 1 · Healthy · For the whole family

Lamb (particularly a joint) is best suited for a weekend meal as it is seen as a tasty, high-quality treat but it lacks the criteria of a weekday meal in terms of value, easy to cook and health.

Tasty (with pork) 1 · Treat 1 · Healthy · Easy to cook · Value

Beef (strongly associated with mince and steaks) has the opportunity to play all week parts, with consumers understanding the ease of mince for weekdays and the treating element of steaks for weekends. However, beef is hindered by health perceptions, particularly for mince.

Easy to cook 2 · For the whole family 2 · Healthy

Added value (e.g. roast in a bag, ready-to-cook, added-value products and sous vide) is lacking a unique selling point. While consumers understand it is quick to cook, it is perceived as the unhealthiest option and lacks quality credentials.

Quick to cook 1 · Healthy · Good quality

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

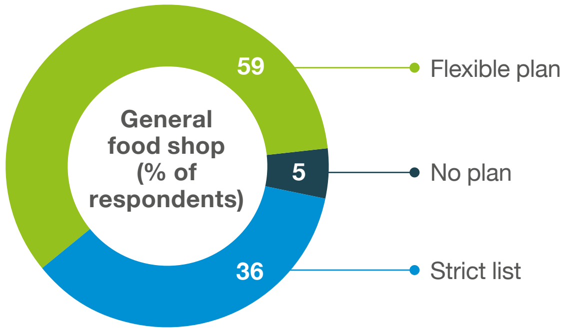
Implication – Play on existing decision criteria strengths in communicating weekday and weekend meal options. For weekdays, messaging around ease of cooking and health will be key.

For weekends, messaging around treating and trying something new will be more persuasive.

For both occasions, this should be coupled with taste, quality and enjoyment.

AT HOME – SHOP PLANNING

When it comes to choosing their meals, 36% of shoppers use a strict list when shopping and 59% have a flexible plan. However, when meats are involved, things seem less flexible, with 45% using a strict list and 46% being more changeable.



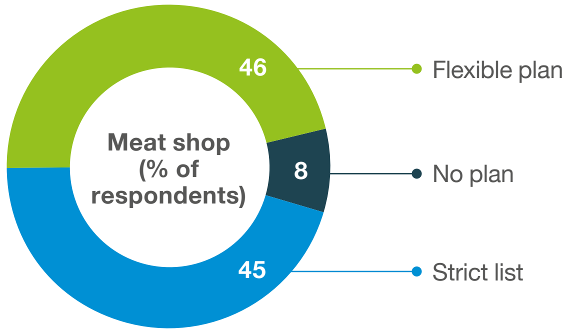


Figure 2. Shop planning – % of respondents who plan a general shop and a meat specific shop

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

(Q – Thinking about the last main shop at X, which of these statements best describes your approach on that day? And thinking about meat in particular? Base 751)

A shopping plan is more likely for weekday meals, while weekend meals tend to be more open and creative.

> "During the week, I don't have time to plan meals so it tends to be always the same: chicken pasta, chilli, jacket potatoes … so I know exactly what I need"

Female, single mum, early 30's

> "At the weekend, there's more time so you can try new things. My husband and I like to look at recipes together and maybe try something new"

Female, married mum, early 40's

Therefore, some meats and cuts are more likely to be on the strict list, typically those that meet the weekday decision criteria: chicken breasts, diced chicken and beef mince. While these cuts will remain on people's shopping lists, we need to ask 'can we encourage others to feature by playing on weekday needs for other meats and cuts?'

While strict plans are used by some, there is still an opportunity to influence over half of shoppers in-store who have a flexible plan or no plan at all. On average, 60% of respondents claimed they chose what meat to purchase in their last shop, while at home. Consistent with the above, it was chicken and beef that scored above average here, and the big opportunity is for pork and lamb (particularly steaks, chops and joints) where decisions are more likely to be made out-of-home.

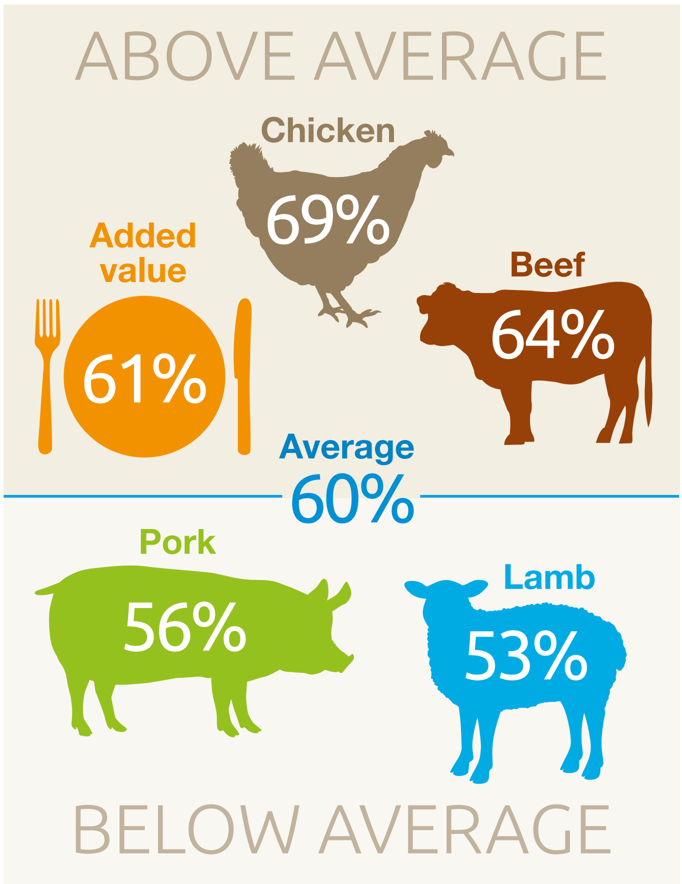


Figure 3. Shop Planning – % of respondents who decided what meat to purchase at home

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

(Q – You ended up buying (PROTEIN) meat products. When did you decide about each of the following elements? Base 751)

Implication – Opportunity for more meat and cuts to feature in shop planning by encouraging use in weekday meals. A huge opening exists to influence out-of-home, particularly for pork and lamb, where inspiration out of store, as well as in-store, will be optimal.

CLAIMED MEAT DECISION CRITERIA

To fully understand how we can influence shoppers in-store, we must first look at what they 'claim' are important considerations for meat purchases at this point. These are the priorities that shoppers think they consider when in-store; however, what they think and what they do may differ, so, in reality, this criteria could change when we look at what actually influenced them.

On average, respondents claim to consider four factors in-store before a meat purchase, which need to be communicated in-store to encourage sales.

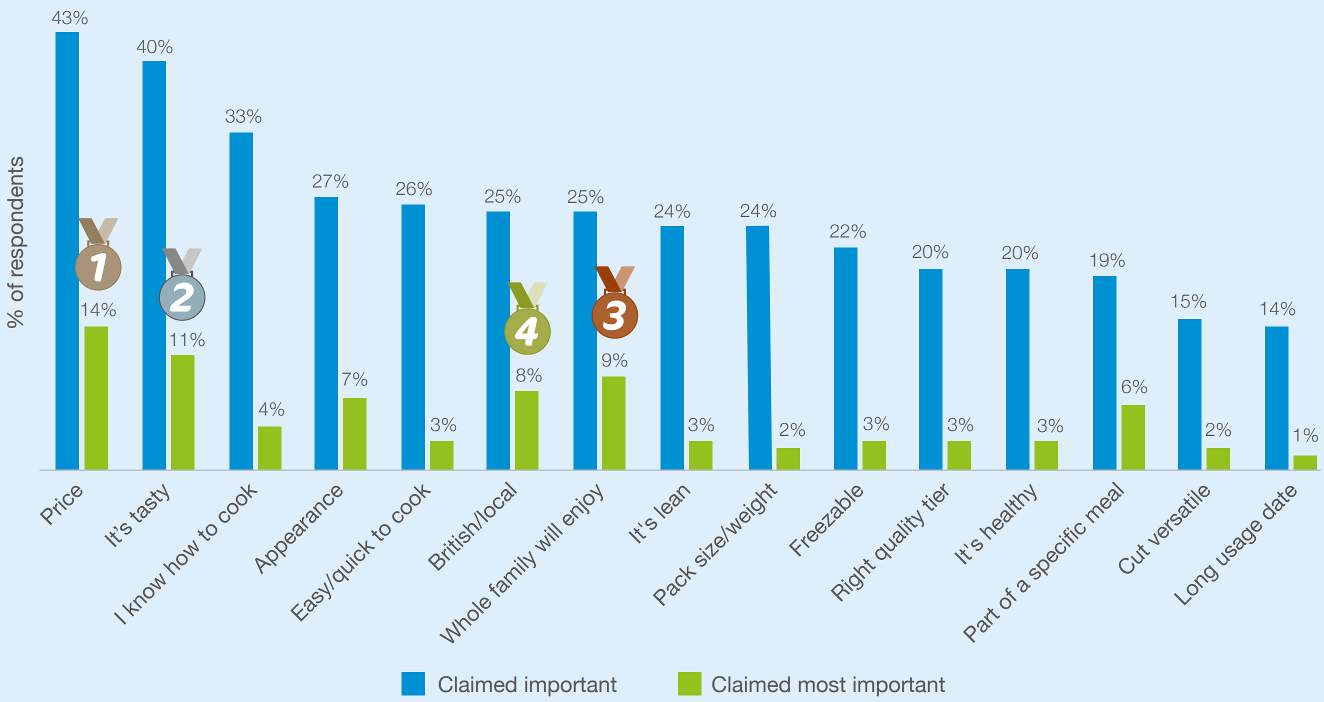


Figure 3. Claimed meat decision considerations – Top 15 (% of respondents)

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

(Q – Which of these played a part in your decision to buy...on this occasion? And if you could only pick one? Base 751)

Although there was no strong winner for 'most important' factor when buying meat, 14% of shoppers said price was a top priority. This was followed by taste (11%), enjoyment (9%) and British/local (8%). Appearance of the meat was a close fifth, while, in 2012, it featured higher on the priority list, showing that, while appearance is still significant, consumers today focus more on value.

If we compare these claimed considerations to pre-store decision drivers, we can see ways to vary the messaging. **Due to their strong link with meal planning, convenience (ease of cooking), enjoyment and health are elements that should be dialled up pre-store.** This is not to say these elements should be ignored in-store, but tackling them at the start of the decision-making journey ensures certain meats and cuts are front of mind when shopping. **It would be of greater benefit to focus messaging in-store on price and product credentials, coupled with enjoyment and taste.**

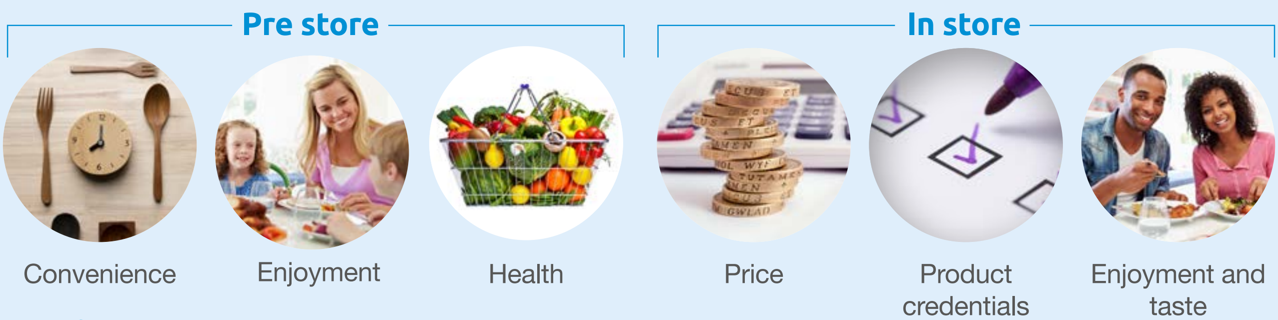
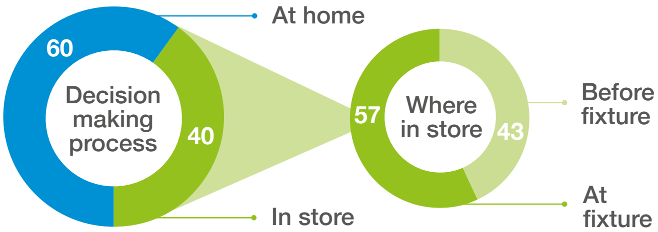


Figure 4. Comparison of pre-store and in-store decision drivers

IN STORE – PRE FIXTURE

While we have identified that, on average, 60% claim they decided what meat to buy in their last shop at home, this still leaves 40% making their decision out-of-home. We may assume the next touchpoint would be the meat fixture but it appears shoppers are getting inspiration from elsewhere in store:



Implication – As meat is the 'star of the show', focus on messaging throughout the store. Displays inspiring meals in different aisles can encourage a meat purchase.

IN STORE – MEAT FIXTURE

When it comes to time spent selecting meat, shoppers spend on average between 41 and 84 seconds at fixture while considering their purchase decision.

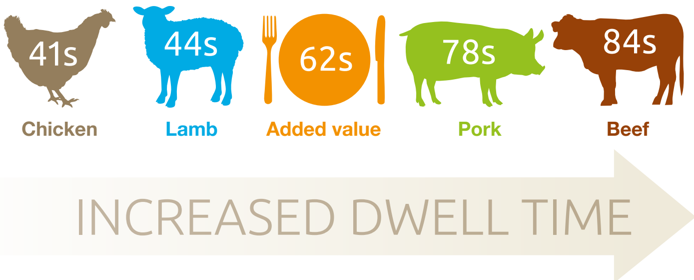


Figure 5. Dwell time at fixture by meat (based on average time per cut of meat)

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

(In-store observations: Time at fixture: Base: All respondents (n=419), Chicken (n=208), Lamb (n=69), Pork (n=61), Beef (n=144), Value Added (n=60))

Selection time varies by cut of each meat. For meat cuts, shoppers appear to spend more time selecting pork and beef products, which indicates they consider the appearance of steak and chops more important than, say, chicken breasts, which only take 24 seconds to choose. For mince, which is most strongly linked to beef, dwell time was surprisingly high at 78 seconds, which could be attributed in part to the wide range on offer. Unsurprisingly, a roasting joint (not chicken whole bird, which is 43 seconds) takes the longest time to select at 82 seconds. This is probably the biggest investment and used for 'special' meals.

Of the 60% of respondents who pre-planned their meat choices, once at fixture, very few changed their minds. They may have looked at different meats but they tended to buy what they originally had in mind. This benefits the meat and cuts that are typically pre-planned: chicken and beef mince.

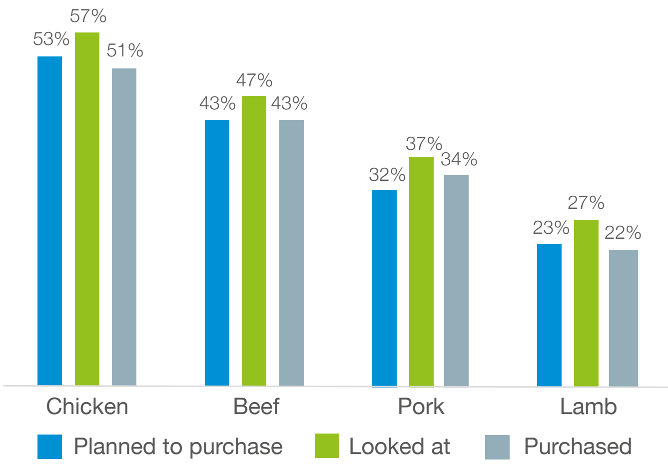


Figure 6. Pre-planned versus what happened at fixture

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

(Q - Which of these types of meat, if any, were you planning to buy before you entered the store? Which did you look at, once here? And which did you buy? Base: pre-planned 495)

This not only highlights the opportunity to convince the third of shoppers who arrive without a plan but also shows the potential to encourage shoppers to mix things up in terms of meats and cuts, when at fixture, by providing more inspiration.

So far, in this report we have captured what shoppers claim they consider in-store. However, what actually happened once at fixture shows some insightful subconscious behaviour. The top decision drivers remain relatively similar but some factors become more or less persuasive when making the final choice, than previously claimed. Although shoppers claimed to consider four factors, on average, when it came to the fixture, this dropped down to three.

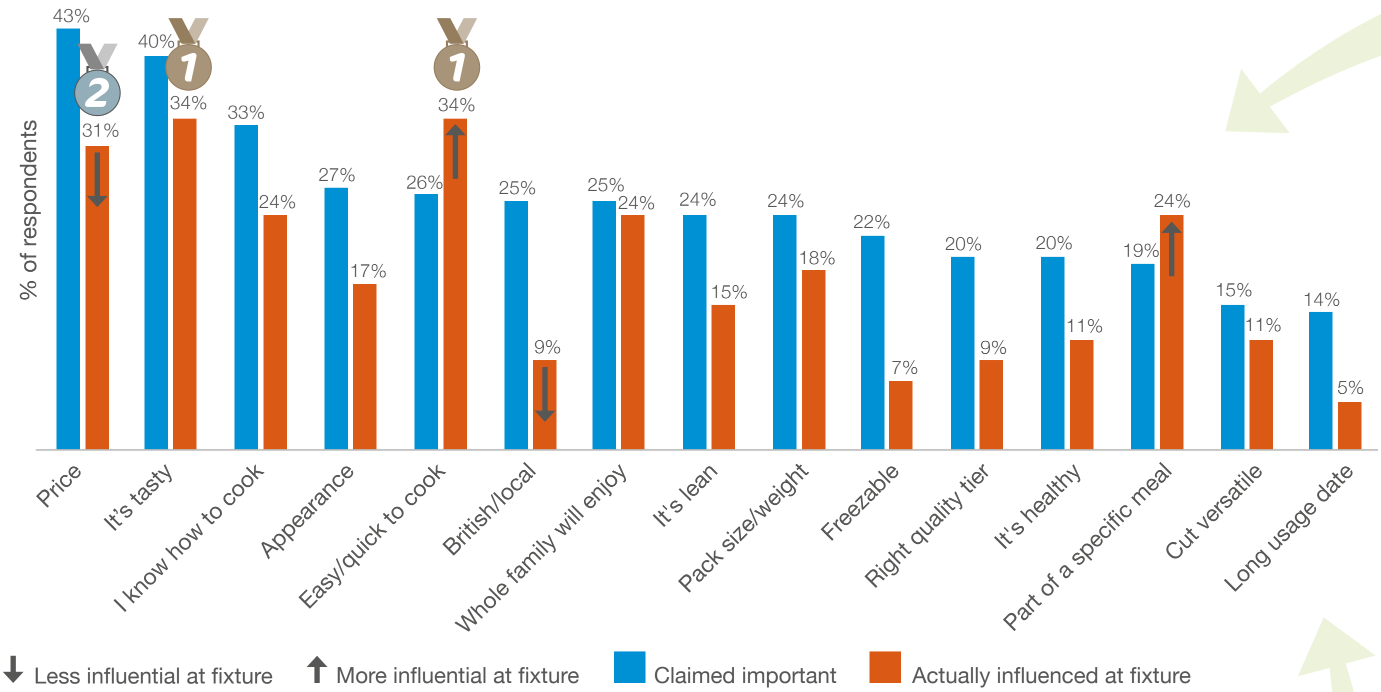


Figure 7. Top 15 claimed meat considerations versus what actually influenced at fixture (% of respondents)

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

(Q – Which of these played a part in your decision to buy...on this occasion? Thinking specifically about the meat, which of these played a part in your decision to buy this particular pack of meat, once at fixture today? Base 751)

Of most influence at fixture was taste and ease/quick to cook (both mentioned by 34%), followed by price (31%). Falling outside the top three but close behind (all at 24%) was know how to cook, enjoyment and part of a specific meal.

While not consciously considered that high, two elements became more influential at fixture: easy/quick to cook and part of a specific meal. While convenience was a top priority pre-store, it shows a real need to reaffirm this criteria at fixture, as well as inspire meals at point of purchase. This communication, coupled with messaging around taste and enjoyment, will be highly persuasive at fixture. An opportunity area is display, where 45% of respondents claim a lack of inspiration.

Implication – Use navigation and signage to guide and inspire shoppers (particularly those without a plan). Design packaging and point of sale fixtures to bring convenience and taste/enjoyment factors to life, using imagery to show delicious cooked products (via recipe cards or on pack) as well as information on ease of cooking.

We also see two factors become less influential at fixture: price and British/local.

Role of price and promotions

Starting with price, 43% of respondents claimed this to be a consideration in store but it influenced only 31% at fixture. While this is quite a dramatic drop, it is still the second highest influencer, which shows its importance. It appears that consumers subconsciously use price and promotions more than they realise. When recalling previous shopping experiences, only 10% claim a promotion is important in their decision. However, 30% bought at least one piece of meat on promotion. This shows that they are actively sought after and taken advantage of when buying meat. In fact, 47% of switches are due to price or promotions. Promotional mechanics should therefore be used, particularly with meats and cuts that are unplanned and, hence, more influential at point of purchase (pork, lamb and added value), rather than the meats and cuts that are typically purchased anyway (chicken and beef mince). This highlights an opportunity to push promotions harder at weekends when experimenting with new cuts is more likely. If promotions are not an option, helping a consumer understand the 'value' of the purchase via other messages will be beneficial to justify higher prices.

Role of origin and welfare claims

British is currently the highest considered claim on pack, although falling behind top influencers of price and taste. Shoppers state British and an origin flag provide reassurance and indicates quality.

> “I always look for the British flag. It’s a sign of quality, isn’t it?”
>
> **Female, grown up children, mid 50s**

> “British means it follows UK rules and regulations. So everything is done as it should and you don’t have to worry about where your meat is coming from or what has been done to it”
>
> **Female, grown up children, mid 50s**

For British/local, 25% claim it is an important consideration for a meat purchase but, once at fixture, it played a role for only 9% of shoppers. Other product credentials such as quality standards, welfare, breed and nutrition show a similar pattern and fall outside of the top drivers discussed.

This is consistent with previous research by AHDB which shows a difference between how important consumers claim product credentials to be versus how they act in store. A study by IGD Shoppervista highlights that 72% of shoppers agree that food manufacturers and retailers can be trusted to provide safe products (Source: Health, Nutrition & Ethics Report, June 2018). This indicates shoppers may consider it less in store because it is expected.

An opportunity lies in educating shoppers about the meaning of on-pack claims. Despite quality marks having high recognition a chance lies in building the understanding of their benefits. There is a clear role for education outside of store, as well as in-store, as shoppers clearly have an interest for various product credentials but it would encourage conversion more if they were better understood.

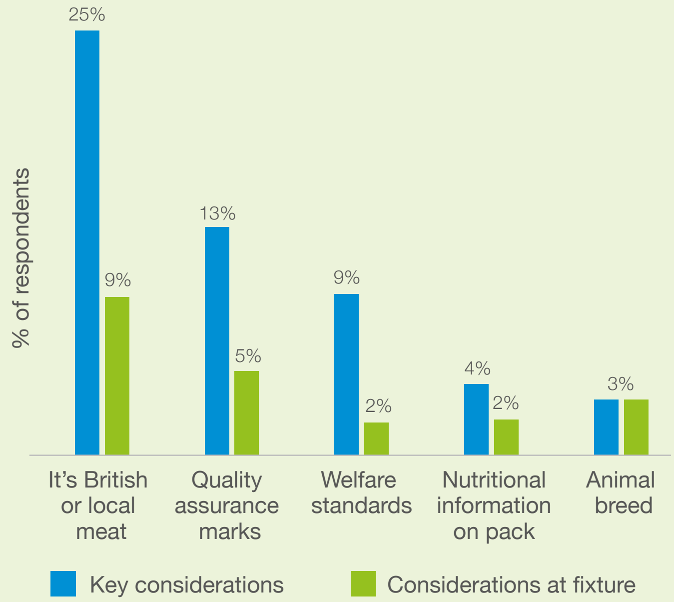


Figure 8. Product credentials – Claimed meat considerations versus what actually influenced at fixture (% of respondents)

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

(Q – Which of these played a part in your decision to buy … on this occasion? Thinking specifically about the meat, which of these played a part in your decision to buy this particular pack of meat, once at fixture today? Base 751)

FAIRTRADE	Assured Food Standards	Quality Standard beef British	Quality Standard lamb British	Soil Association Organic Standard	RSPCA Assured
90%	72%	37%	29%	72%	37%

Figure 9. Awareness of Quality Marks

Source: AHDB/YouGov, Attitude & Usage Tracker Report, May 2018

(Q – You will now see some marks that have appeared on meat. Have you seen this mark before? Base 318)

Implication – The importance of clearly communicating price at fixture is apparent. Effective promotions encourage unplanned meat purchases (pork, lamb and added value), inspiring weekend food experiments.

Consciously, on-pack claims are important to shoppers but they currently show low influence at fixture. Therefore the opportunity lies in closing the knowledge gap around claims and marks, with fixtures providing a communication platform to educate, as well as media.

A final area to mention is about added-value. Currently, added-value ranges have lower awareness than primary meat, showing an opportunity to stand out more at fixture and therefore enhance consideration. This, coupled with communication about how these products meet shopper needs, particularly for weekday meals, and addressing the health perceptions, would raise the profile of these formats.

Roast in the bag joints

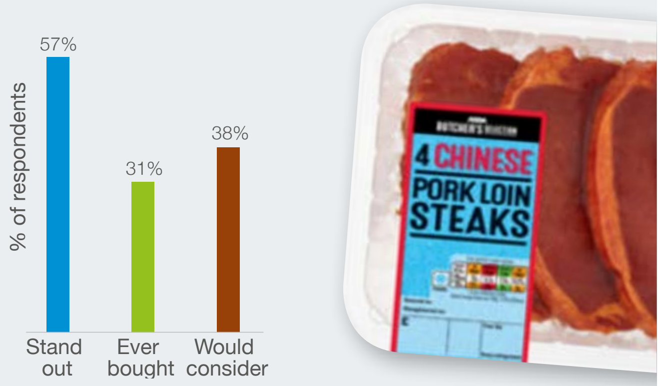
Raw, whole, chicken, beef joint, lamb joint

Ready to cook

Raw joints or steaks in a foil tray with accompanying sauce – hunters' chicken, lamb shanks in gravy

Added value products

Raw joint/steaks with accompanying sauce, butter or rub or marinated barbeque products



Sous vide

Pre-cooked products required to re-heat e.g. pork ribs, brisket, pulled pork (usually presented in boxes/sleeves)

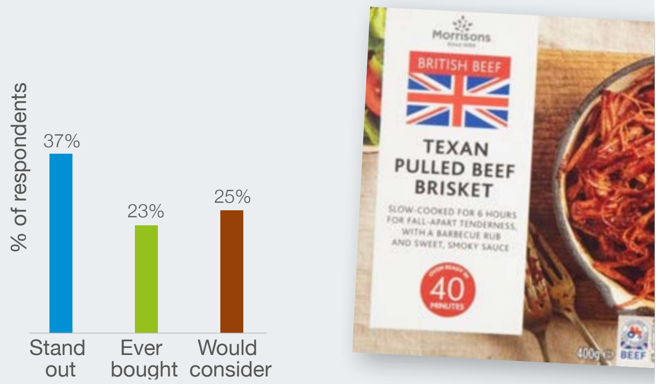


Figure 10. Awareness and consideration of added-value range (% of respondents)

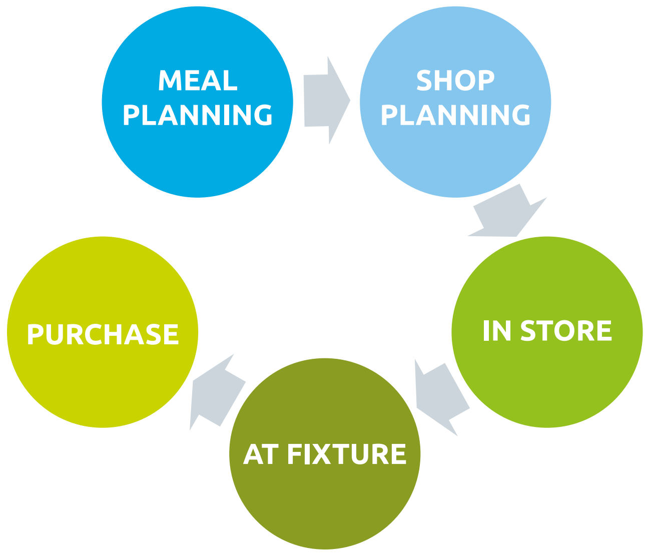
Source: AHDB/Future Thinking, Protein Shopper Journey Research, July 2018

(Q - Which, if any, of these types of meat have you ever seen while doing your shopping? And which would you consider buying? Which have you ever bought? Base (n=751))

Implication – Added-value ranges need to stand out more, showing the potential to improve planograms and merchandising, according to usage options (convenient, healthy, weekday option but also an easy, tasty weekend treat).

SUMMARY OF KEY COMMUNICATION OPPORTUNITIES

The decision journey discussed is highly complex but highlights some key strategies and messaging that can take place at different parts of the journey to maximise purchase potential:



Source: AHDB Consumer and Retail Insights Team

Meal planning – Communicate how meats fulfil fundamental needs of taste, quality, and enjoyment throughout the journey, but particularly at the start, to ensure they enter the consideration set.

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

In store – Continue to focus on taste and enjoyment messaging in store but start to introduce pricing messages and educate on origin and welfare.

At fixture – Continue to focus on taste and enjoyment at fixture. Make sure price is clear but dial up convenience (easy and quick) and inspiration (cooking method and meal solutions).

DIFFERENT SHOPPER JOURNEYS

The decision journey covered is for meat shopping in general and it has highlighted some key insights. It is now necessary to draw attention to any differences in the journey by shop format, retailer type and demographic. While the decision journey does not differ significantly by these splits, it is important to note any subtle differences, to tailor to different strategies.

Any differences by shopper mission?

Meat purchase decisions are broadly similar between main shops and top-up shops, apart from two main areas:

1. When it comes to top-up shops, more of the decision takes place at the fixture rather than at home, showing that inspiration is even more important in top-up environments.

2. It's claimed that price is less important when topping up but there is a heavier reliance on promotional purchases in these missions. Does this indicate promotions can be reduced in the top-up environment as shoppers expect to pay more? Or could the reliance of promotions be better used to encourage trial of more unplanned meats and cuts?

These two differences are significant because of the evolution of the top-up shop. Compared with the 2012 study, we are seeing significantly fewer main shops with the current split being 42% claiming their last shop was a main shop and 38% a top-up shop.

Any differences by retail type?

In the market, the lines are blurring between types of retailers but shoppers still perceive a difference between supermarkets and discounters and, therefore, the consideration drivers vary depending on where they shop. For those who shop at the big four, the appearance and quality of meat plays a more important role in the purchase decision versus discounters where price is significantly more important. This highlights areas to dial up and down per retailer.

Any differences by shopper lifestage?

The decision journey has been split by pre-family, family and empty nesters highlighting areas of variation along the journey:

Meal & shop planning – pre-families are more likely to plan, whereas empty nesters are spontaneous with flexible plans. Therefore, it is more important to influence pre-families at home via messaging around ease and speed to get meat onto the shopping list, whereas empty nesters (and therefore single meal solutions) are more important to inspire at fixture. Families are the middle ground in terms of planning and enter the store with an idea of quality tiering and budget. Those who claim to be flexible are not completely so, highlighting the need for family meal solutions to communicate value in terms of price and quality.

In store – Empty nesters consider more factors when purchasing meat, showing high importance for price, convenience (ease and quickness) and quality. Their flexibility in planning means they look at all of these aspects in store and therefore meal solutions targeted at them require the most information at fixture. Families focus on enjoyment for all and therefore solutions for them should dial this up to drive conversion. For pre-families, as they plan more at home, they focus on taste at fixture.

CONCLUSIONS

Common themes – all meats

Meal and shop planning

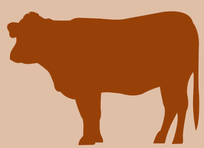
- Many shoppers plan their meals in advance, so it's important to make sure meat is top of mind when at home
- Tailor communication for meats and cuts to meet different weekday and weekend needs, while also communicating taste and quality
- Half of shoppers are flexible with their shop plans so use opportunities to influence their buying decisions in-store

In store

- Taste, enjoyment and convenience are key, so imagery and communication need to focus on both at point of purchase and on pack
- Price and promotions play a big role in decision-making and lead to shoppers spontaneously buying different meats and cuts in-store
- Quality and welfare marks are not yet well enough understood, so education is key

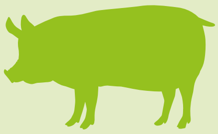
Beef

- Beef can be staple and planned (mince due to ease and value) but also a treat (steak) so opportunity for all meal occasions
- More communication needed of health benefits to improve perceptions, particularly for mince
- In store high dwell times indicate the need for guidance in meeting those different meal needs



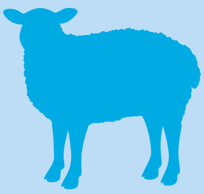
Pork

- Pork is less likely to be planned despite meeting a number of needs
- Taste and ease give a strong communication platform but health benefits need to be communicated to help shoppers understand pork's good fit as a weekday meal
- Play on joints and steaks for weekend treating.
- Inspire meals pre store in order to become more planned and in store to encourage trail (can be coupled with promotions)



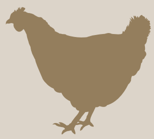
Lamb

- Lamb is seen as a treat and therefore only considered at weekends
- This can be played upon in communications to encourage weekend meals
- Opportunity to increase usage in the week through meal inspiration and help with understanding versatility and cooking process
- Coupling this with promotions will encourage trial

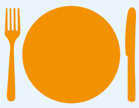


Chicken

- Chicken is a staple, highly planned purchase
- Convenience and health are clear benefits but scoring lower is enjoyment and treating



Added value



- Added value can meet the needs of any meal occasion
- The ease of added value is a strength but health and quality are currently a weakness
- Opportunity to improve stand out. Clearly communicate through better signage how offerings meet different meal occasions
- Play on health coupled with ease for weekdays and quality coupled with treating for weekends

METHODOLOGY

This report is based on research commissioned by AHDB with Future Thinking, a specialist in shopper research, during the summer 2018. This latest piece is a follow-on from the 2012 study, which provided valuable insights on protein purchasing behaviour; however, it is important to refresh as the retail market and consumer behaviour evolve.

The research involved in-aisle interviews, observations and accompanied shops across retailers, including the 'big 4' and discounters, as well as an online usage and attitude survey about meat shopping in general and in-depth exploration of a last meat purchase. The breadth of these methodologies gave both recalled and in-moment insights around decision-making at protein fixtures. This allowed a comparison of purchase intentions with outcomes and highlighted the range of variables that consumers consider at various points along the shopper journey. Understanding these different priorities and when they are most prevalent allows various aspects, particularly messaging, to be used at different times to maximise purchase potential.

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Kim works within the Retail Insight team at AHDB and has a number of years of experience analysing retail data, as well as tracking consumer shopping habits and market trends. Her current role at AHDB focuses on understanding the performance and trends in retail and foodservice to inform and inspire in a rapidly changing market. To complement this, the Retail Insight team works closely with the Consumer Insight team, which tracks, monitors and evaluates consumer attitudes and consumption patterns.

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Matt heads up the Retail and Foodservice Engagement team at AHDB, having worked in consumer insight-related roles previously and as marketing manager for one of the major UK red meat processors. His current role at AHDB is to manage the team tasked to facilitate and account manage engagement between AHDB and the major multiple retailers, foodservice businesses and their supply chains.

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/retail-and-consumer-insight** 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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