

April 2021

European Meat Shopper Insight

Wave 7 Total Market Report

BORD BIA Thinking House

empathy

Who Do We Survey?

We are interested in understanding real shopper behaviour at the point of purchase, in real bricks and mortar retail, as well as through online channels. We survey Grocery Shoppers but our analysis focusses on 'Beef Considerers', those who would consider purchasing beef for their main meals. We are tracking shopping behaviour in seven markets across Europe.

How Many Shoppers?

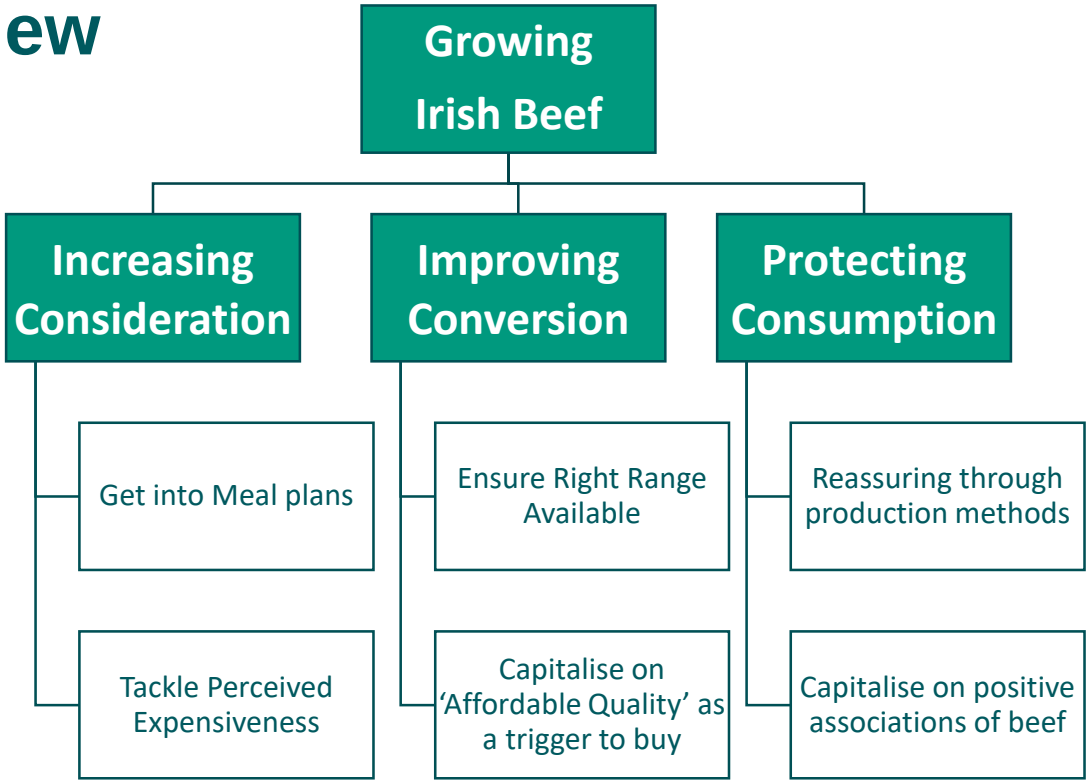
Over the course of every year we survey N=31,500+ shoppers across Europe. Our survey is 'always on', with interviews being conducted daily across these seven markets, which ensures the following sample sizes:

							
Monthly Interviews	**N=375**	**N=375**	**N=375**	**N=375**	**N=375**	**N=375**	**N=375**

The results of this report focus on the behaviour in Jan-Feb 2020 vs. Jan-Feb 2021. The results in relation to Belgium and Sweden are primarily focussed on behaviour from Nov-Dec 2020 vs. Jan-Feb 2021.

Global Report Overview

While each market will have different challenges, opportunities and priorities, we ultimately see the key strategies outlined as a means to grow consideration, conversion and consumption of Irish Beef across the markets.



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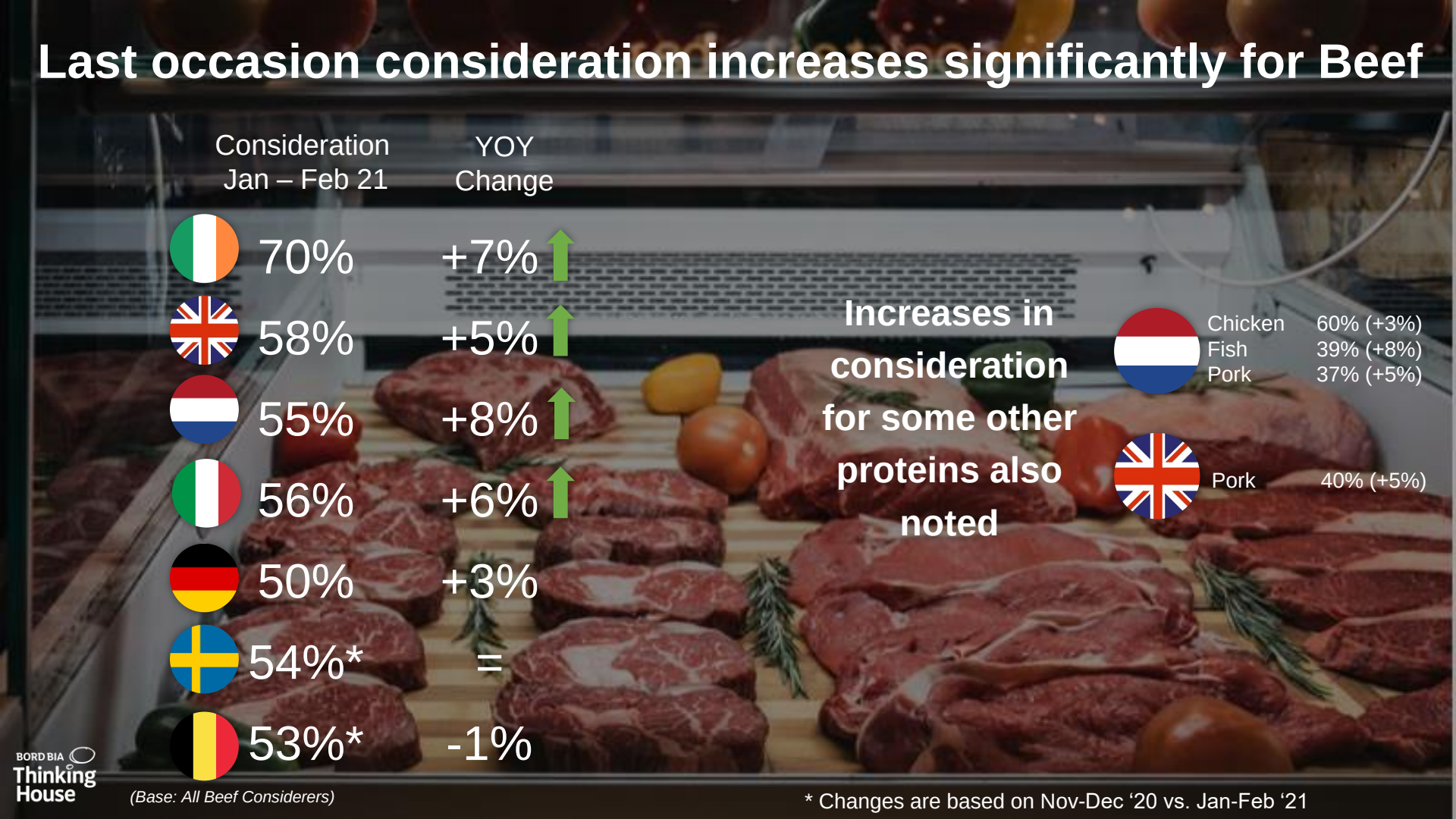
Consideration – Key Takeouts

1. Positively, the level of **last occasion consideration is up amongst beef considerers in key markets** year-on-year.

2. However, beef still faces barriers to consideration, with not being in the **meal plans of shoppers** and the **perceived expensiveness** of beef relative to other proteins key challenges to overcome.

Last occasion consideration increases significantly for Beef



	Consideration Jan – Feb 21	YOY Change
	70%	+7% ↑
	58%	+5% ↑
	55%	+8% ↑
	56%	+6% ↑
	50%	+3%
	54%*	=
	53%*	-1%

Increases in consideration for some other proteins also noted

	Chicken	60% (+3%)
	Fish	39% (+8%)
	Pork	37% (+5%)
	Pork	40% (+5%)

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(Base: All Beef Considerers)

* Changes are based on Nov-Dec ‘20 vs. Jan-Feb ‘21

Not Being in Meals Plans ranked as #1 barrier to consideration in 6 key markets

	Jan – Feb 21	Rank	YOY Change
	41%	1	+7%
	34%	1	+8%
	29%	1	=
	32%	1	+2%
	25%	2	-8%
	29%*	1	-2%
	27%*	=1	-2%

UK research highlights the opportunity to affect meal plans in-store through promotions, but also in pre-store communication.

Influence on meal plans

Special offers In-store	Online Recipes	TV Cooking Shows	Supermarket leaflets/Mags
34%	**25%**	**24%**	**14%**

26%

of shoppers make their meal plans just before grocery shopping but can change plans based on what's available in-store

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* Changes are based on Nov-Dec '20 vs. Jan-Feb '21

(Base: All Beef Considerers who did not consider beef on the last occasion)

Perceived Expensiveness is key barrier but is only marginally increasing in impact, although less of a factor in Italy



	Jan – Feb 21	Rank	YOY Change
	20%	2	+3%
	18%	2	+1%
	12%	4	+2%
	12%	4	+2%
	8%	8	-1%
	17%*	4	-1%
	13%*	4	+1%

* Changes are based on Nov-Dec ‘20 vs. Jan-Feb ‘21

(Base: All Beef Considerers who did not consider beef on the last occasion)

Increasing Consideration – Key Opportunities

Increasing Consideration

Get into Meal plans

ENGAGE WITH THE SHOPPER

In-store presents a significant opportunity to engage with shoppers and influence their meal plans, to get beef, and specifically Irish beef in the trolley. **We know that a sizeable proportion of shoppers are influenced by promotions/offers in-store and supermarket leaflets/magazine** so we need to make sure that beef is represented strongly in these channels.

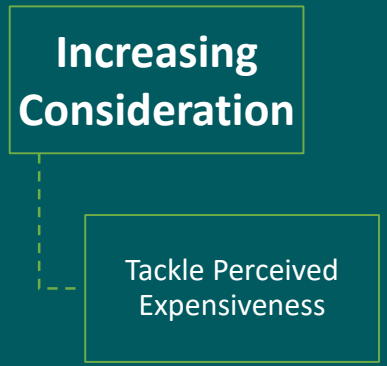
Online recipes and cooking shows are key in the UK in helping with the development of meal plans and beef needs to be present here also, **highlighting how Irish beef can be used and why it should be the main choice for specific meals**.

OCCASION CHANGE & VERSTAILITY

Ensuring it is easy for shoppers to understand how the different types/cuts of beef can be used across different meal types is important to drive consideration overall and reduce the barrier to consideration of not being in meal plans.

Communicating with shoppers as to the versatility of Irish beef and how the different cuts of beef can be used will inspire meal ideas. By positioning beef as a viable alternative to other proteins for meal occasions (e.g. beef fajitas instead of chicken) we can broaden the repertoire of meals for which beef is considered.

Increasing Consideration – Key Opportunities



ADDING & DEMONSTATING VALUE

We need to reinforce with consumers **the value they get from beef and try to reduce the perception that beef is expensive**. Shoppers across all markets already recognise that beef is a high quality product relative to other proteins, with gains most pronounced in The Netherlands and the UK in this regard. Communications in-store need to reinforce this quality association.

In the case of Irish beef, emphasising how our beef is produced (small herd, outdoor pasture, grass-fed) can help rationalise to shoppers why Irish beef is more expensive than local beef offerings or the chicken/pork equivalent (if indeed this is the case).

COMPETITIVE PRICING / OFFERS

Ensuring we can **help the shopper make easier and more rational decisions at the point of purchase will also be important in driving down expensiveness perceptions**, which are most pronounced in the German market.

Combining quality messaging with tactics such as smaller pack sizes to hit key price points will be important in tackling this perception.

Providing a range of cuts/formats of Irish beef to hit different price tiers, and/or promotions to win new shoppers, while reinforcing quality can drive trial of great tasting Irish beef and lead to repeat purchase.

Conversion – Key Takeouts

1. **Last occasion and weekly+ purchase increasing in Ireland and Italy**, with weekly+ purchase also increasing in the Netherlands. However, there has been a slight decline in both metrics in Germany and the UK.

2. **Range availability** is increasing as a barrier to purchase, with shoppers wanting something new or a change also playing a prominent role.

3. **Leveraging the positive perception towards beef is key to growing purchase incidence** and range challenges can present an opportunity to engage with the right strategy in-store.

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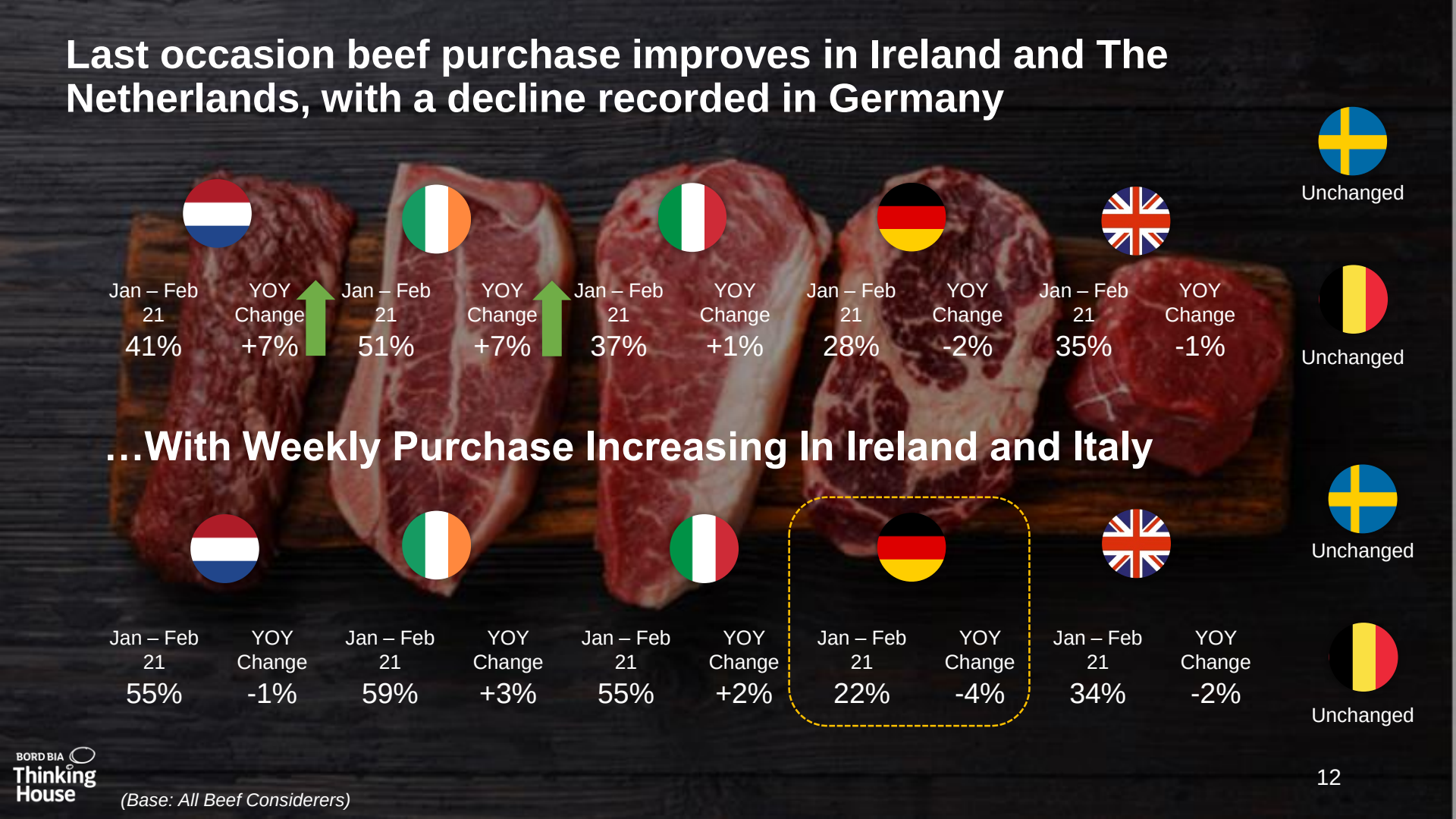
The Purchase of Beef is Steady with Less Reduction Evident than in 2020

	Purchasing Beef the Same as I always Did		Purchasing More Beef		Purchasing less but better quality Beef	
	Jan – Feb 21	YOY Change	Jan – Feb 21	YOY Change	Jan – Feb 21	YOY Change
	52%	+3%	12%	-1%	19%	-1%
	54%	=	19%	+5%	16%	=
	55%	+7%	14%	-1%	21%	-6%
	55%	+5%	12%	+2%	20%	-2%
	44%	+5%	7%	-1%	33%	-2%
	51%*	-2%	12%*	=	25%*	+5%
	56%*	-1%	11%*	+3%	20%*	-2%

(Base: All Beef Considerers)

* Changes are based on Nov-Dec '20 vs. Jan-Feb '21

Last occasion beef purchase improves in Ireland and The Netherlands, with a decline recorded in Germany



	Jan – Feb 21	YOY Change
Netherlands	41%	+7%
Ireland	51%	+7%
Italy	37%	+1%
Germany	28%	-2%
UK	35%	-1%
Sweden		Unchanged
Belgium		Unchanged

…With Weekly Purchase Increasing In Ireland and Italy

	Jan – Feb 21	YOY Change
Netherlands	55%	-1%
Ireland	59%	+3%
Italy	55%	+2%
Germany	22%	-4%
UK	34%	-2%
Sweden		Unchanged
Belgium		Unchanged

(Base: All Beef Considerers)

While not the main barrier to purchase, Range available in-store is increasing as a barrier in Italy and The Netherlands

	Jan – Feb 21	YOY Change
	19%	+6%
	11%	+4%

Key Barriers to purchase

Wear-out, eye-catching alternatives and perceived expensiveness are key aspects affecting the decision not to purchase beef on the last occasion



1. Wanting a change
2. Alternatives looking good

1. Alternatives looking good (+5%)
2. Better deals on alternatives





1. Perceived Expensiveness but declining (-8%)

1. Perceived Expensiveness (+7%)
2. Better deals on alternatives





1. Wanting a change (+7%)
2. Perceived expensiveness

1. *Better deals on alternatives (+13%)
2. Perceived Expensiveness





1. *Wanting a change
2. Wanting a healthier option (+11%)

(Base: All Beef Considerers who considered but did not purchase beef on the last occasion)

* Changes are based on Nov-Dec ‘20 vs. Jan-Feb ‘21

We conducted in-store research with Sainsbury's shoppers to understand what aspects of range are affecting them. These insights provide examples of how we can improve range for all retailers

The look of the available cuts

*"I had planned to buy a beef steak but was open to which one. **There wasn't much choice left and the ones that were there were quite fatty**. I'm going to look at maybe getting mince instead"*

Ease of preparation

*"I did not find the **beef fillet strips** I was looking for. I intended to make a quick meal with pasta, or rice or fajitas. Something that would be quick to prepare and cheap. **I opted for king prawns** as these were already in a lime chilli and coriander marinade."*

Quality cut variations

*"They **don't have enough quality minced meat**. Very difficult to find burgers which are low in fat. **Very small selection of burgers overall**"*



Stock shortage

"There appeared to be a stock shortage in the chiller, so I wasn't able to get what I came into the store for."

*"There was a lack of stock for some items, for example burgers. I would like to see **improved stock levels and perhaps some meal ideas in the form of imagery** to make the shelves look less clinical."*

Mixed fortunes for Steak purchase



Significant increase in the purchase of steak in Ireland

60%
(+11% year-on-year)

The growth in steak purchase in Ireland is driven by Striploin purchase



Significant increase in the purchase of steak in Belgium

54%
(+6% wave-on-wave)

The growth in steak purchase in Belgium is driven by Fillet purchase



Purchase incidence also increasing in the UK 44% (+5%)



Significant decline in the purchase of steak in Italy but levels remain highest overall

66%
(-7% year-on-year)



Significant decline in the purchase of steak in Germany, with low levels of purchase evident

40%
(-11% year-on-year)

The decline in steak purchase in Italy and Germany was driven by drop in lower value peppered steaks and striploin steaks.

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(Base: All who purchased beef on the last occasion)

Improving Conversion – Key Opportunities

Improving Conversion

- Ensure Right Range Available

CATEGORY / SUB-CATEGORY MANAGENEMENT

Range availability is a key barrier to purchase across markets and is an issue for most retailers. The increase in range as a barrier is most pronounced amongst shoppers in Italy and The Netherlands. Range issues can manifest in **a manner of different ways,** the portion sizes being too big or too small, the cut not being available, lack of quality cut variations or products being out of stock. Tackling these issues can be done through category or sub-category management by completing a range assessment to ensure right SKUs are listed by store and planogram size to cater to shopper needs, where possible.

INNOVATION IN RANGE

Secondly, creating **new beef solutions to cater to the gaps in market compared to other meats will help close the range available gap in the eyes of the shopper**. Within specific cuts/types of beef are there enough options across the different tiers (everyday & premium) to meet consumer needs?

By innovating with new offerings we can also start to address other challenges to purchase and consideration, such as **not being in meal plans or wanting a change** which are most pronounced in Italy, The Netherlands and Belgium, by highlighting variability within beef.

Improving Conversion – Key Opportunities

Improving Conversion

- Capitalise on ‘Affordable Quality’ as a trigger to buy

SENSORY APPEAL TO REINFORCE QUALITY

From research in the UK we record that many shoppers evaluate the quality of beef in terms of the look (level of fat) of the meat combined with its freshness (dates), descriptors, imagery on pack and at fixture, awards, and how fresh it looks.

Ensuring the presentation of Irish beef is as sensory appealing as possible in the pack, on the pack and at the point of sale will be fundamental in triggering purchase and reinforcing quality perceptions.

Consumption – Key Takeouts

1. **There has been a move in the right direction across all markets on past 12 month consumption**. More in Ireland now say they're buying more beef than 12 months ago than say they're buying less. The same is also true in regard to intended consumption over the next 3 years. Covid has meant a return to beef in 2020 and this looks to continue in 2021.

2. Key challenges remain in relation to **animal welfare and environmental concerns** but they are not accelerating.

3. **Positive associations of beef** are on the increase and present a significant opportunity to demonstrate why beef may be more expensive, and worth paying the money for.

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The NET consumption position of beef is improving in all markets, with Ireland recording growth in consumption over the past 12 months

PAST 12 MONTHS CONSUMPTION OF BEEF

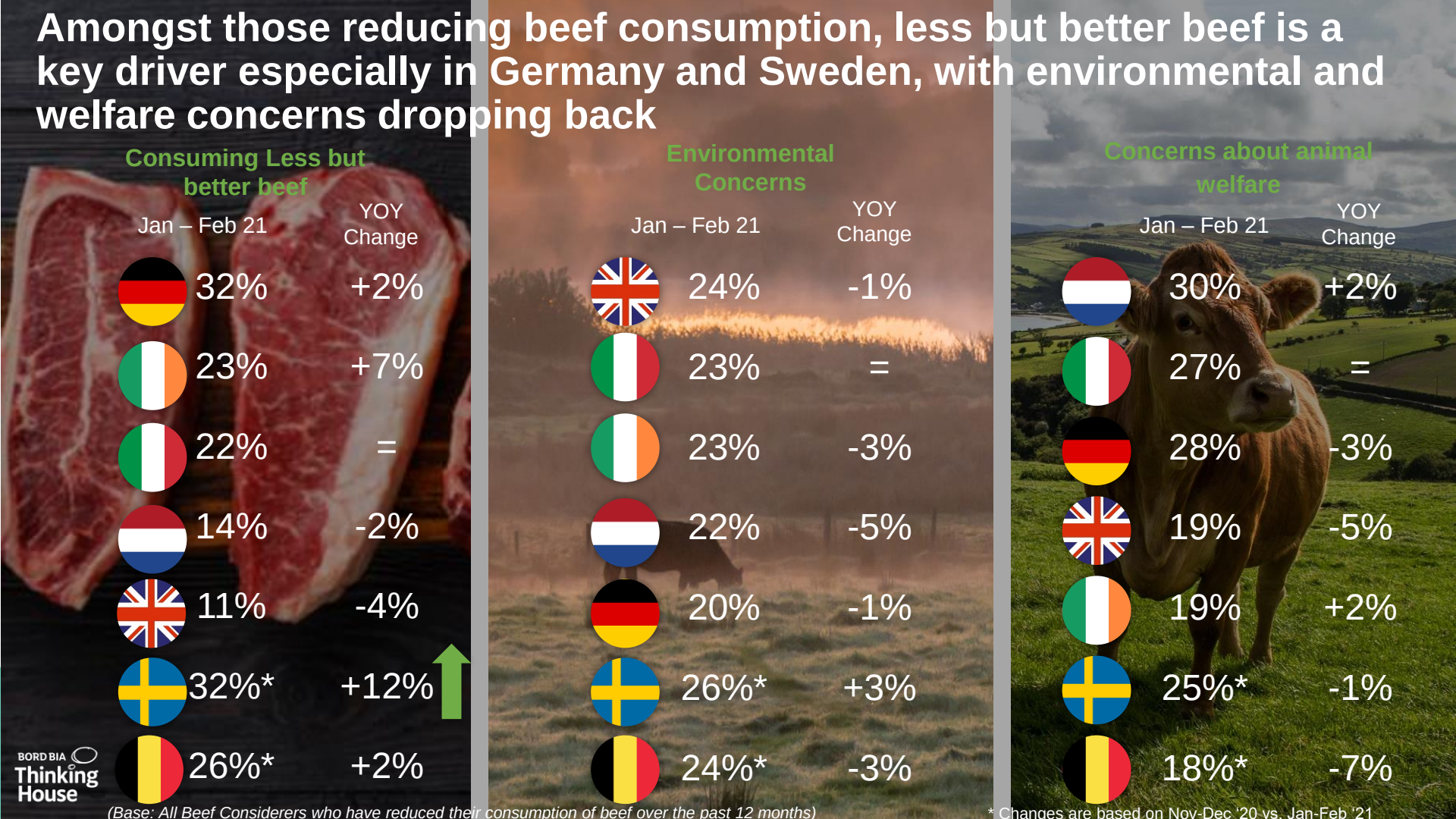
Jan – Feb 21

	NET CONSUMPTION (Proportion Consuming More Beef – Proportion Consuming Less Beef)	YOY Change in NET Consumption
	+5%	+7%
	-6%	+2%
	-7%	+4%
	-14%	+2%
	-15%	+3%
	-11%*	+6%
	-8%*	+4%

(Base: All Beef Considerers)

* Changes are based on Nov-Dec '20 vs. Jan-Feb '21

Amongst those reducing beef consumption, less but better beef is a key driver especially in Germany and Sweden, with environmental and welfare concerns dropping back



Consuming Less but better beef

	Jan – Feb 21	YOY Change
DE	32%	+2%
IE	23%	+7%
IT	22%	=
NL	14%	-2%
UK	11%	-4%
SE	32%*	+12%
BE	26%*	+2%

Environmental Concerns

	Jan – Feb 21	YOY Change
UK	24%	-1%
IT	23%	=
IE	23%	-3%
NL	22%	-5%
DE	20%	-1%
SE	26%*	+3%
BE	24%*	-3%

Concerns about animal welfare

	Jan – Feb 21	YOY Change
NL	30%	+2%
FR	27%	=
DE	28%	-3%
UK	19%	-5%
IE	19%	+2%
SE	25%*	-1%
BE	18%*	-7%

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(Base: All Beef Considerers who have reduced their consumption of beef over the past 12 months)

* Changes are based on Nov-Dec '20 vs. Jan-Feb '21

The opportunity for Grass-fed is significant in most markets, with growth in desire for this type of beef most evident in Italy

Proportion claiming grass fed beef would motivate them to purchase beef in the future

	Jan – Feb 21	YOY Change
	38%	+1%
	34%	+3%
	29%	-1%
	28%	-4%
	15%	-2%
	29%*	+1%
	30%*	+2%

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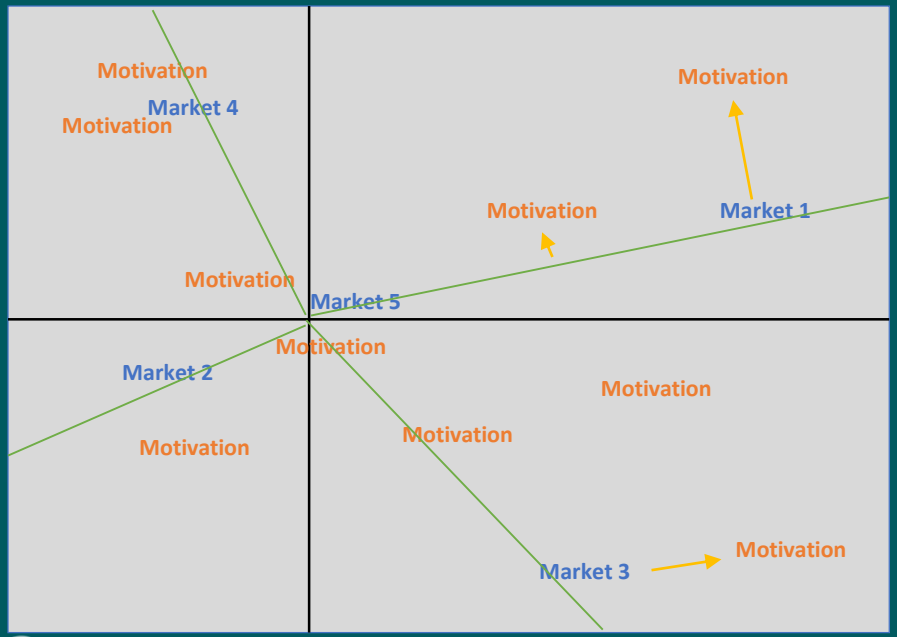
(Base: All Beef Considerers)

* Changes are based on Nov-Dec ‘20 vs. Jan-Feb ‘21

Correspondence Mapping Explained…

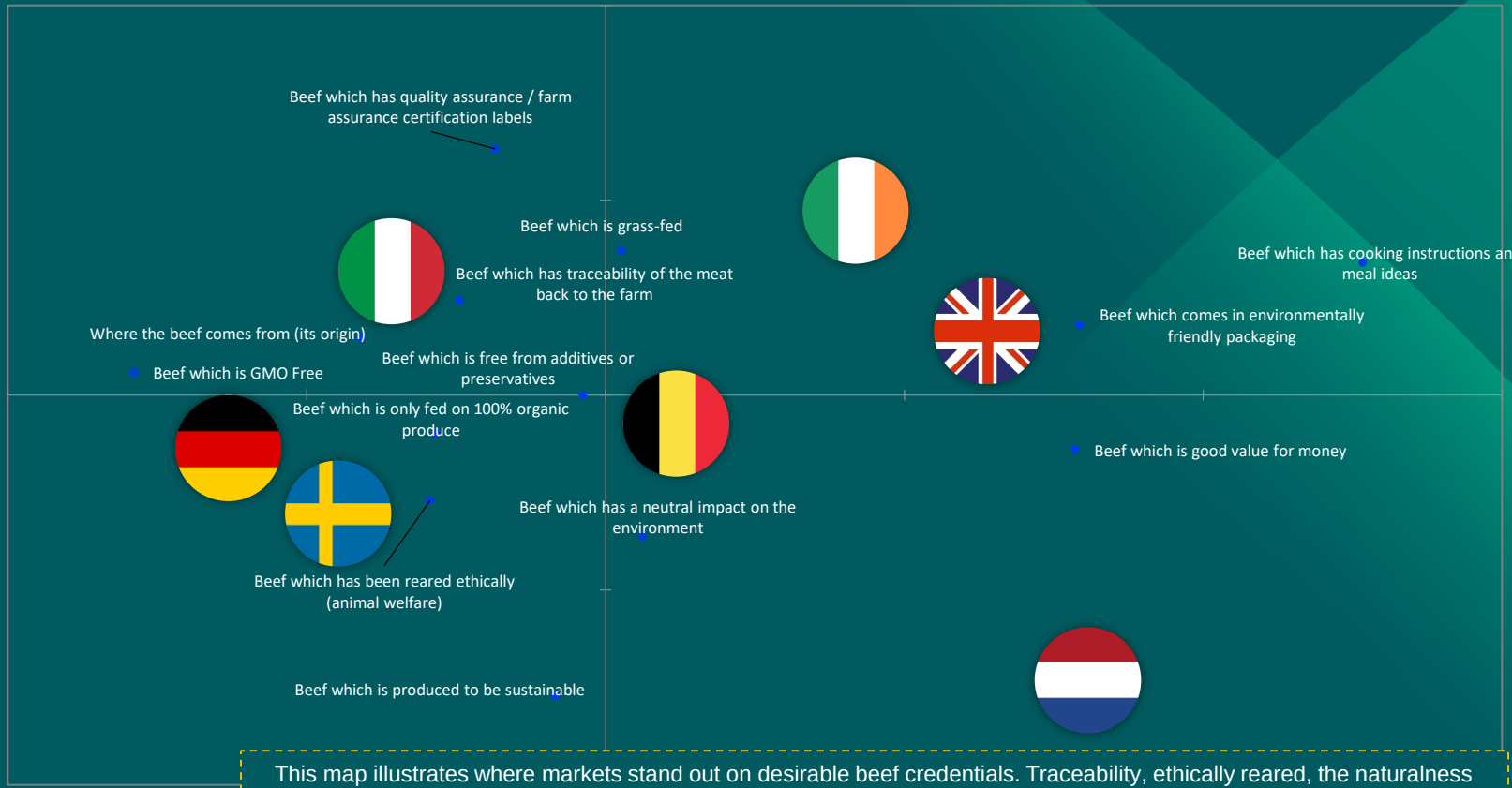
What's this?
Correspondence mapping is a visual representation of relative strengths and weaknesses of particular motivations across different markets. It removes the impact of the size of the motivation and highlights where motivations are more present in particular markets, regardless of the size of the motivation overall.



- The map overleaf allows us to visually assess how motivating aspects are when it comes to purchasing beef, by plotting all markets.
- By drawing a line from the centre of the grid through the location of the market, motivations located close to the line represent a relatively strong motivation for that market compared to other markets – a key driver in that market.
- Motivations that are further away from a particular market are deemed to be lower in driving purchase in that market.
- Motivations clustered around the centre of the map are deemed to be non-differentiating across markets.

Correspondence Analysis – Motivators of Future Purchase

Jan – Feb 21



This map illustrates where markets stand out on desirable beef credentials. Traceability, ethically reared, the naturalness and the origin are all more likely to drive future purchase in Italy, Germany and Sweden. There's an opportunity for grass-fed to work very well here. UK shoppers are more likely to look for value, environmentally friendly packaging and cooking ideas/instructions.

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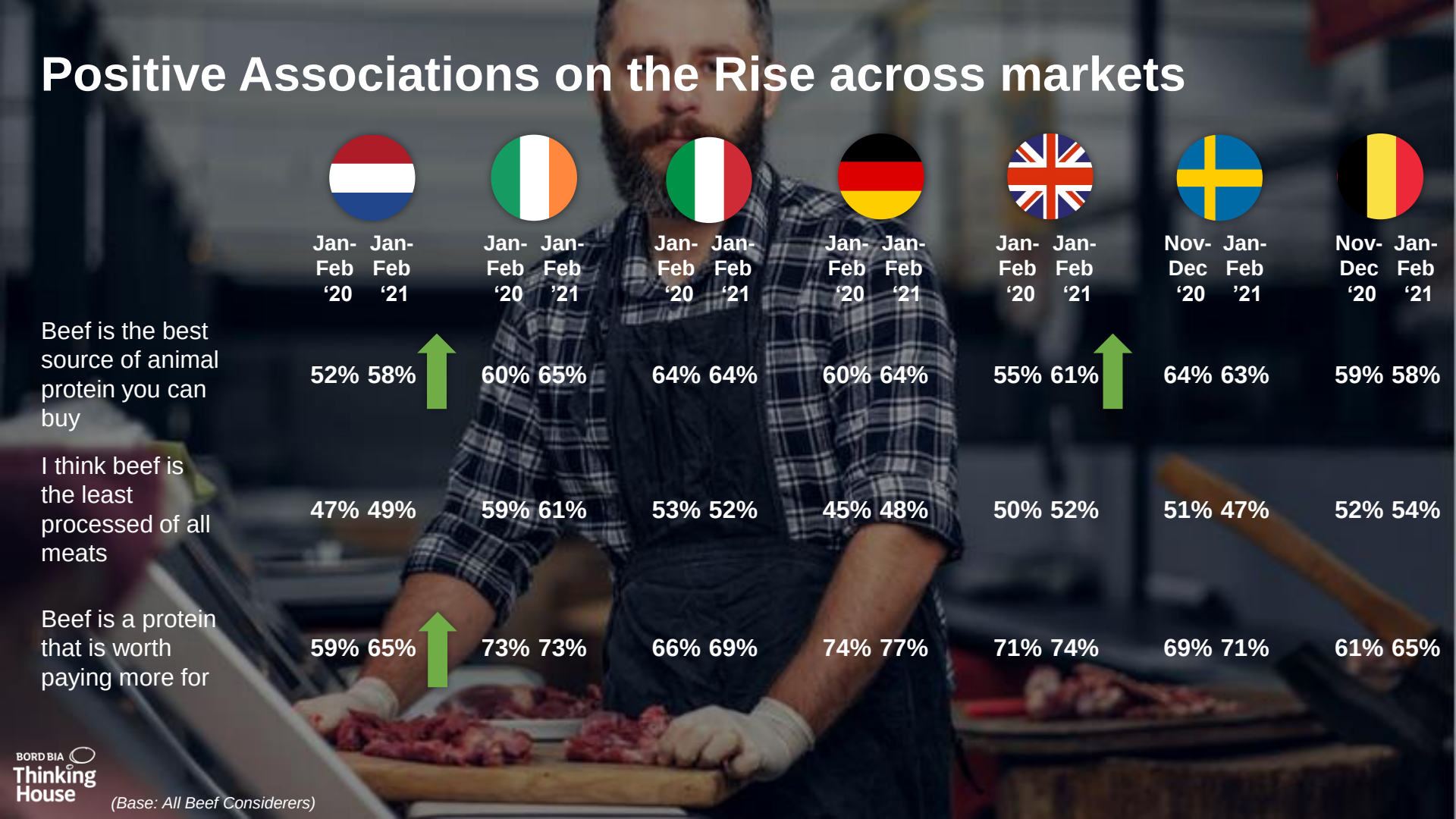
(Base: All Beef Considerers)

Positive Associations on the Rise across markets



	Jan-Feb '20	Jan-Feb '21	Jan-Feb '20	Jan-Feb '21	Jan-Feb '20	Jan-Feb '21	Jan-Feb '20	Jan-Feb '21	Jan-Feb '20	Jan-Feb '21	Nov-Dec '20	Jan-Feb '21	Nov-Dec '20	Jan-Feb '21
Beef is the best source of animal protein you can buy	52%	58%	60%	65%	64%	64%	60%	64%	55%	61%	64%	63%	59%	58%
I think beef is the least processed of all meats	47%	49%	59%	61%	53%	52%	45%	48%	50%	52%	51%	47%	52%	54%
Beef is a protein that is worth paying more for	59%	65%	73%	73%	66%	69%	74%	77%	71%	74%	69%	71%	61%	65%

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(Base: All Beef Considerers)

Protecting Consumption – Key Opportunities

Protecting Consumption

- Reassuring through production methods

TELLING THE IRISH BEEF STORY

Dialling up the key attributes which separate Irish beef from local beef or other types of protein (e.g. grass-fed, smaller herd sizes and outdoor pasture rearing) can help alleviate concerns consumers have in relation to animal welfare and the environmental impact of beef production. German, Italian and Dutch consumers most likely to be influenced by animal welfare in reducing their beef consumption over the past 12 months, so this messaging will be key in these markets.

This communication can also help position Irish beef as a high welfare beef, that serves as a feel-good factor for consumers to continue consuming beef. There is a feeling amongst some beef shoppers that they ought to reduce consumption. From consumer research in Germany we know consumers respond well to these key Irish proofpoints and they can provide a feel-good factor that helps them stay in the beef category. The ultimate demonstration of this messaging is how these production approaches and processes (e.g. grass fed) leads to a better end taste experience.

Protecting Consumption – Key Opportunities

Protecting Consumption

- Capitalise on positive associations of beef

LEVERAGING THE POSITIVES

Beef is in a strong position when it comes to shoppers' associations, across all markets with growth most evident in The Netherlands and the UK and the opportunity to use and leverage this positioning should not be missed.

Across all markets there are positive trends in agreement that:

Beef is the best source of animal protein you can buy
Beef is the least processed of all meats
Beef is a protein that is worth paying more for

Highlighting the association with and perception of beef on these aspects can support any conversations **with retailers as rationale for more space in-store, more in-store marketing support or more ranges/tiers or types of beef being offered**.

Reinforcing this perception of beef at the fixture and through other communication plans will help to remind shoppers of how they perceive beef, and why it is worth paying more for Irish beef.

Working Together on Shopper Insight in 2021



New overall and individual market reports available bimonthly

Bespoke retailer-specific reports available on request

For more information and/or report debriefs on this project get in touch:

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Thank You

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