The Thinking House

BORD BIA INSIGHT CENTRE

Where's the Beef?

11th January 2019

Research objectives

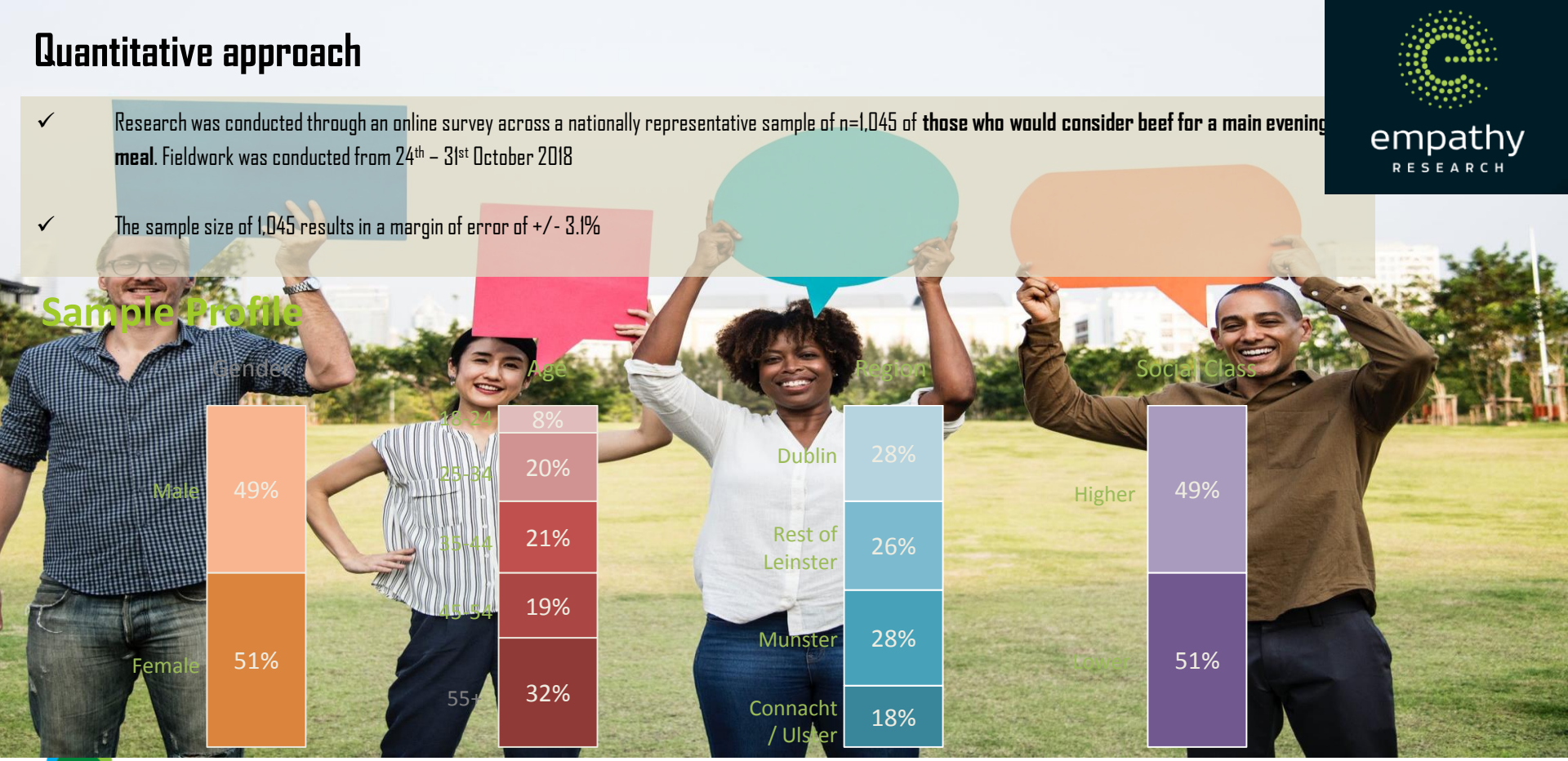
UNDERSTANDING SHOPPER BEHAVIOUR TO DRIVE GROWTH WITHIN THE CATEGORY



Quantitative approach

- ✓ Research was conducted through an online survey across a nationally representative sample of n=1,045 of **those who would consider beef for a main evening meal**. Fieldwork was conducted from 24th – 31st October 2018
- ✓ The sample size of 1,045 results in a margin of error of +/- 3.1%

Sample Profile



Qualitative Approach

3 x groups – All eating beef at least twice a week

Group	Main supermarket	Lifestage
1	Aldi/Lidl	Older family*
2	Dunnes/SuperValu/Tesco	Younger family*
3	Dunnes/SuperValu/Tesco	Pre-nester*

3 x consumer shadowing sessions (in-store interviews)

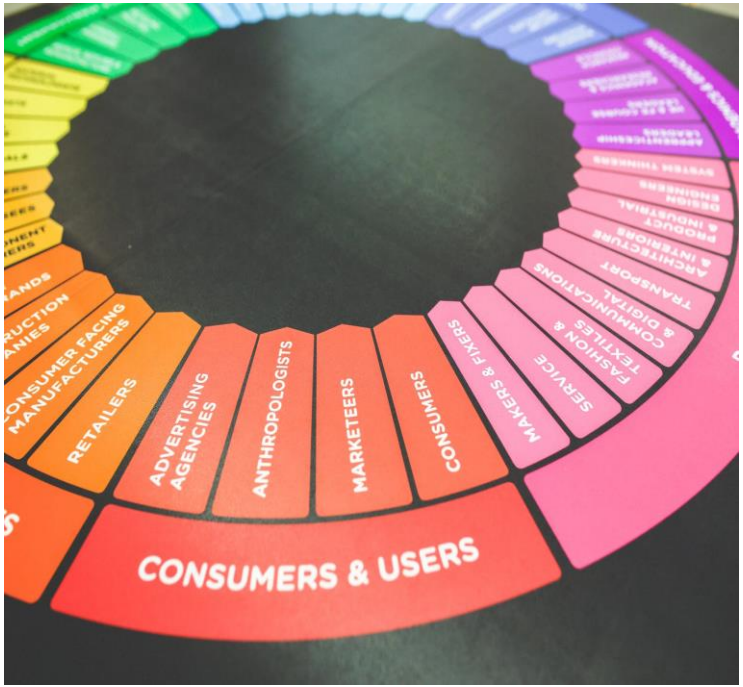
1 x expert interview (meat retailer)



***2-3 to be experienced butcher shoppers**

***2-3 to have non-meat days or have cut down on meat in past few years**

***2-3 to be into protein/going to gym**



Are we talking to our customers?

..AND IN A WAY THEY CAN UNDERSTAND

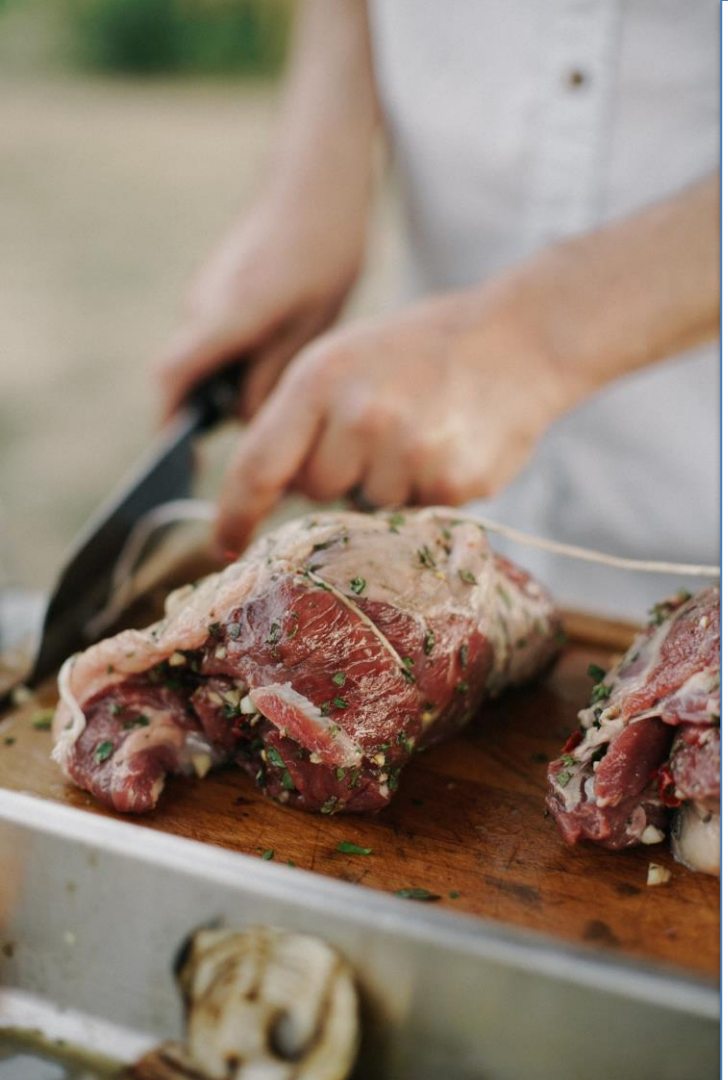


56% of people would like to gain more knowledge about beef and the different type of cuts available


42% agree that the beef section
in stores/supermarkets is boring

Nearly a third did not consider beef on the last occasion





70% would like to see more new ideas in the beef section


" We have the best beef in the world"
respondent

There is significant potential to drive growth



Report Outline

Purchasing patterns

Submersion in Store

Retailer performance

Consideration & Purchase Behaviour
-the role packaging plays

Opportunities to Drive Purchase – the new rules..

Building beef futures

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Purchasing Patterns

Frequency of Purchasing Beef



56%

once a week or more often

27%

Once every 2-3 weeks

Those aged 35-44 are significantly more likely to be purchasing once a week or more often (64%)

However, other types meat and seafood are also being purchased frequently...



77%

once a week or more often

14%

Once every 2-3 weeks



40%

once a week or more often

27%

Once every 2-3 weeks



24%

once a week or more often

29%

Once every 2-3 weeks

Frequency of Consuming Beef Personally



10%

4-6 times a week

45%

2-3 times a week

23%

Once a week

While the majority have not reduced Beef Consumption, there are more who have reduced their consumption than increased it in the past year.

7%

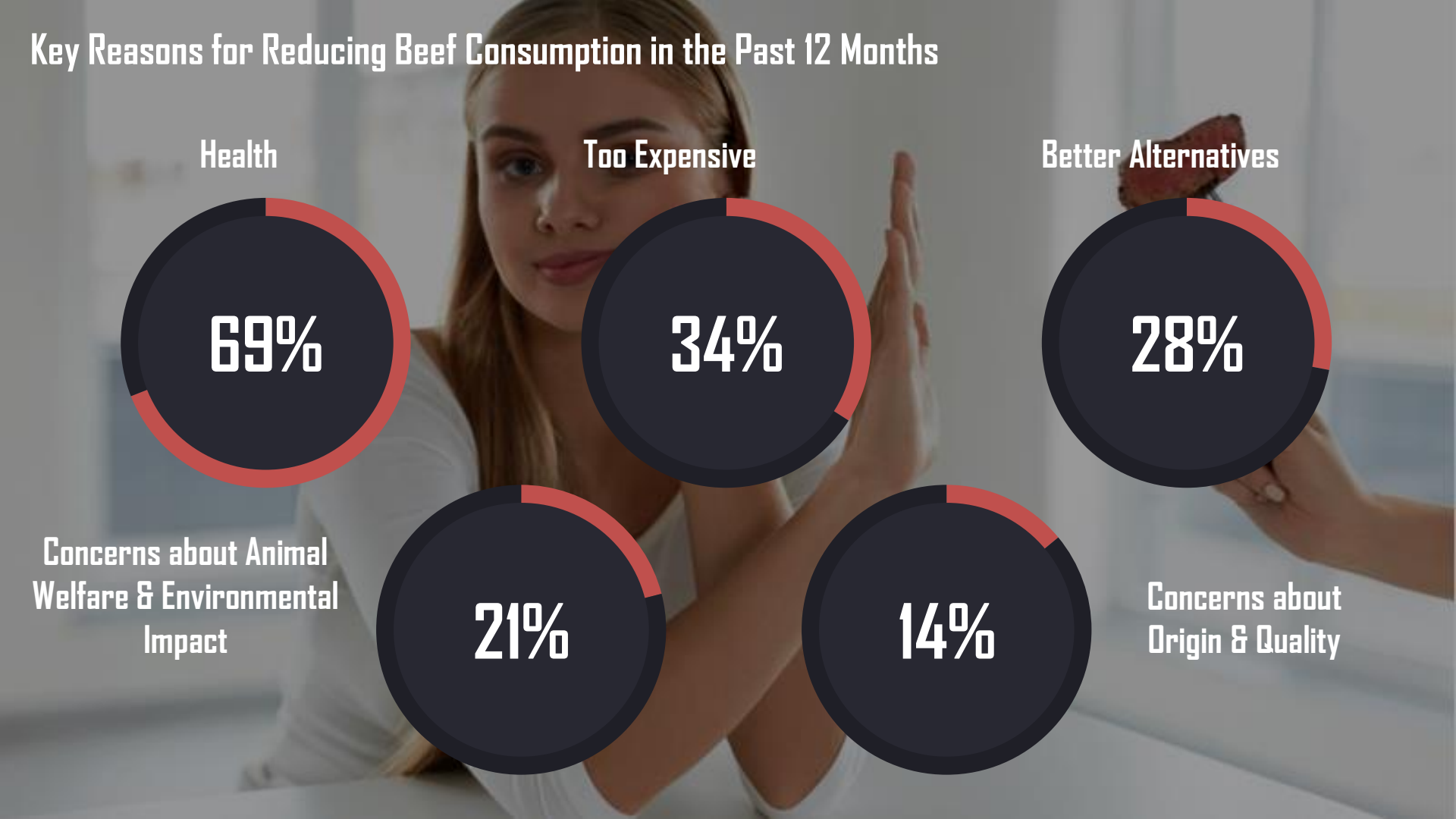
Are eating more beef than they were this time last year

15%

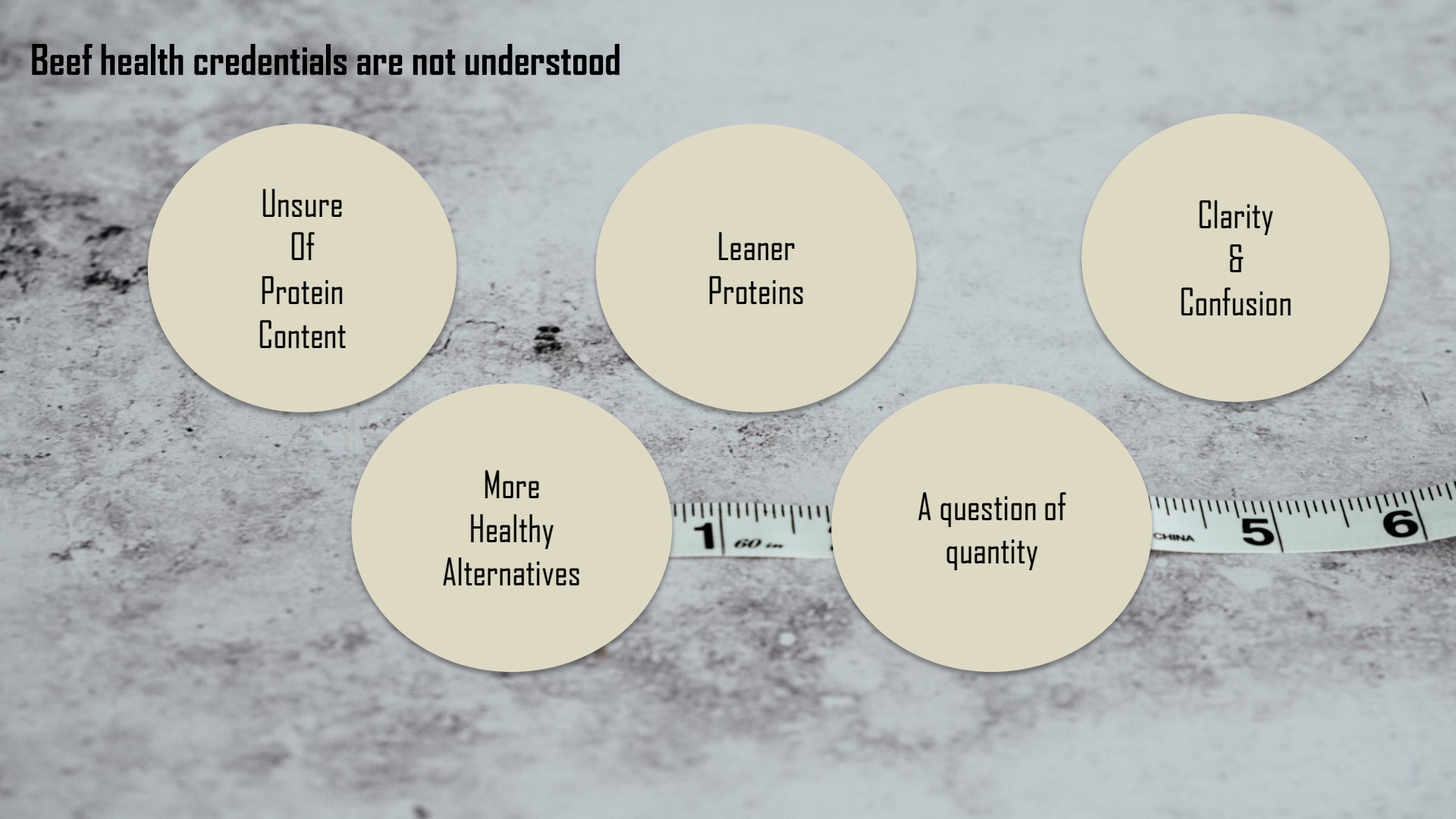
Are eating less beef than they were this time last year



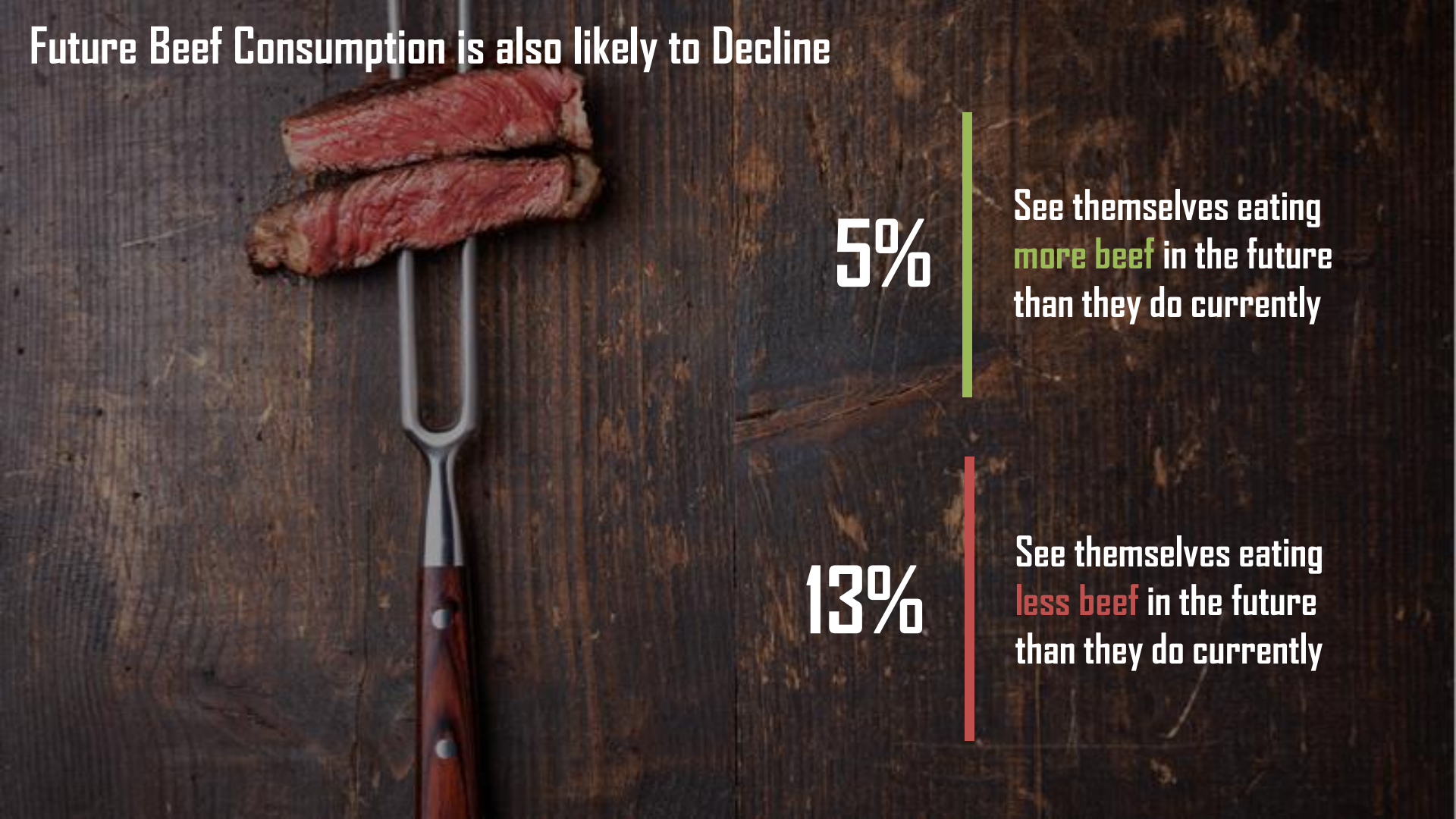
Key Reasons for Reducing Beef Consumption in the Past 12 Months



Beef health credentials are not understood



Future Beef Consumption is also likely to Decline



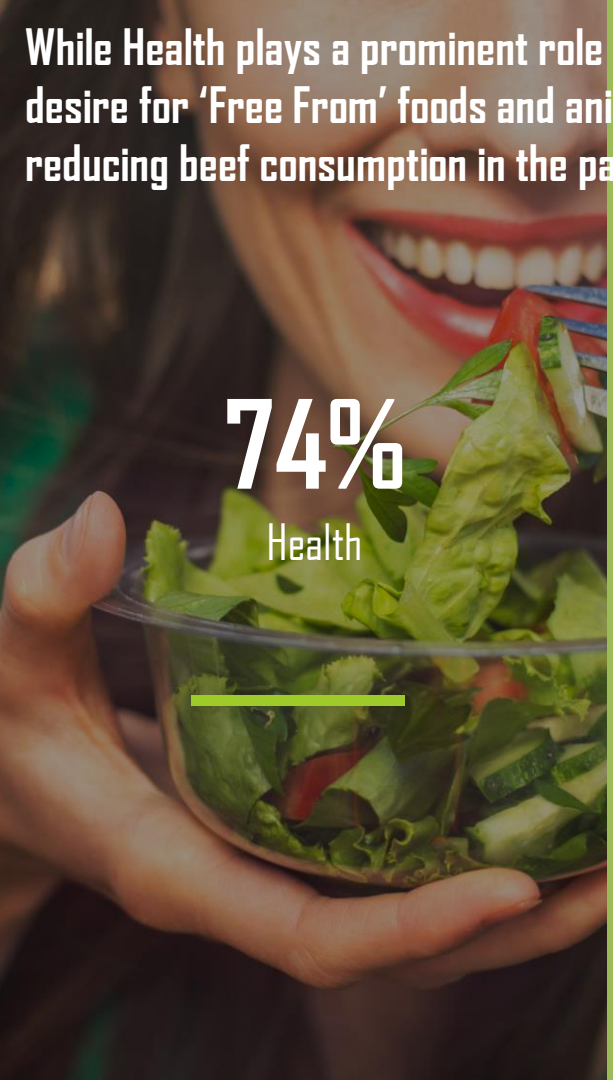
5%

See themselves eating **more beef** in the future than they do currently

13%

See themselves eating **less beef** in the future than they do currently

While Health plays a prominent role in the future reduction of beef consumption, the environmental impact, the desire for 'Free From' foods and animal welfare will play a much more pronounced role than they have done in reducing beef consumption in the past 12 months.



74%

Health



39%

Environmental Impact & Free From Food



35%

Animal Welfare

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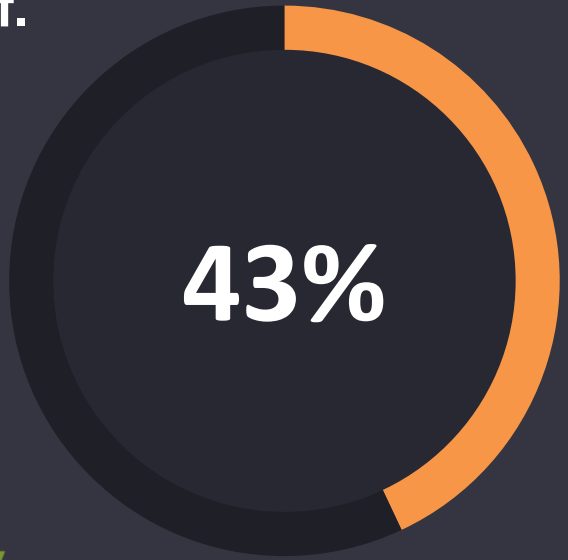
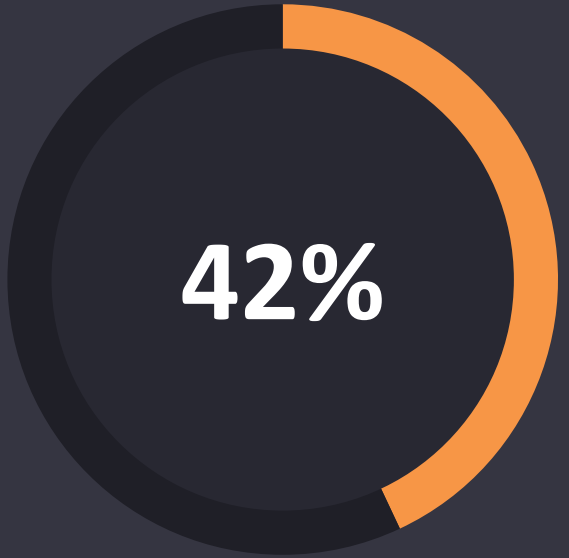
Store Submersion

Currently Consumers are not Loving the Experience When Shopping for Beef.



Agree that nothing **really stands out** in this section

Agree that the **beef section** in stores/supermarkets **is boring**



The Majority of Beef Considerers are Buying Beef the way they always did…



53%

Buying beef the same as they always did

60% amongst those aged 35-44 (the most frequent buyers of beef)

13%

Buying less beef

19%

Buying a little less; but **buying better beef**

11%

Buying **more beef nowadays**

" Where's the beef?"

" What's the beef?"



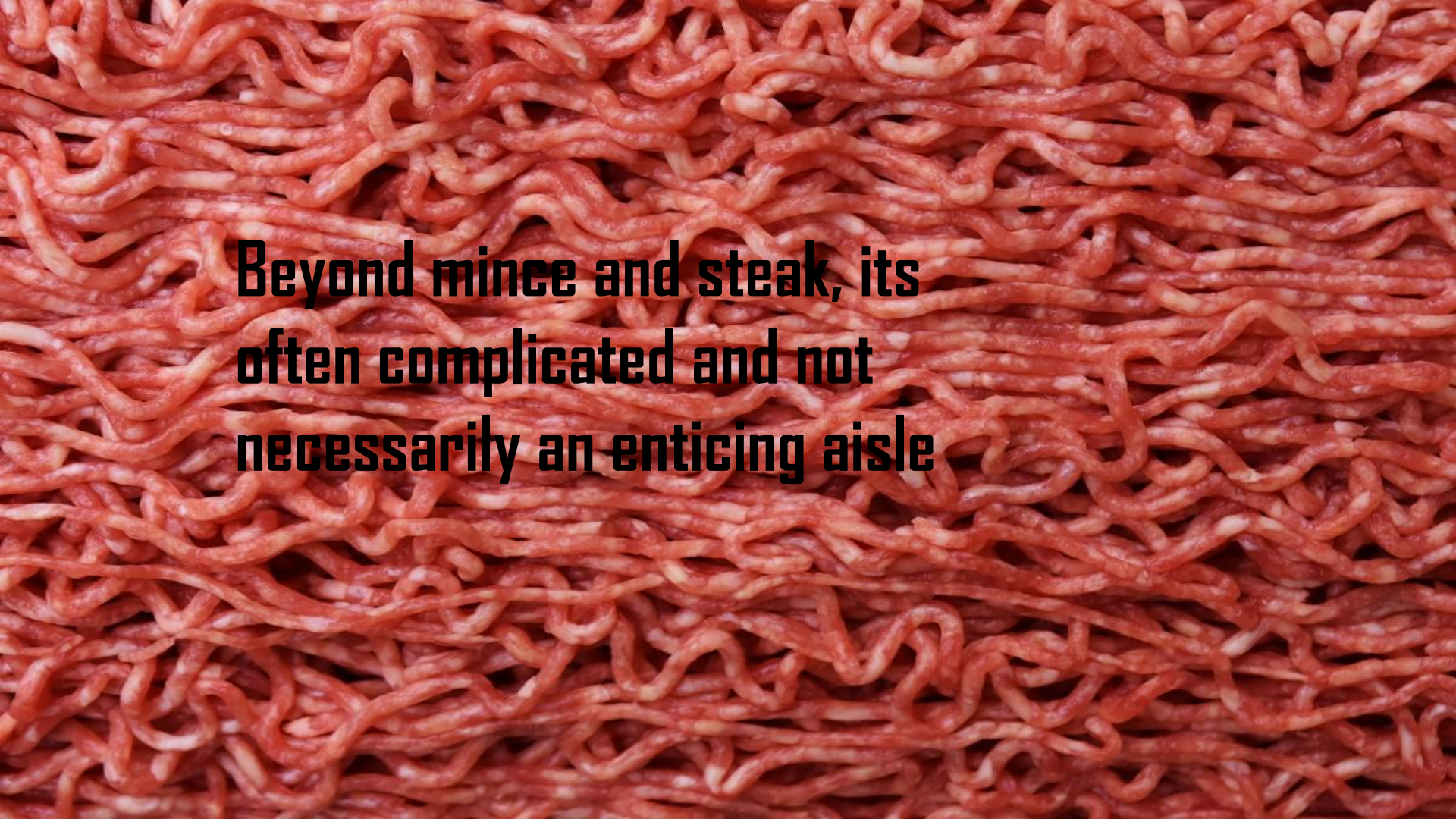
Untidy
Shelves



Lack of visibility



It all looks
the same


Beyond mince and steak, its
often complicated and not
necessarily an enticing aisle

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Retailer Performance

Currently the beef offering in-store is having some impact on Shoppers but there is work to do for Retailers in this space…



Extent to which retailer beef offering influences the choice of store for main grocery shop

33%
Influential

40%
Influential

SuperValu
Real Food, Real People

39%
Influential

LIDL

37%
Influential

TESCO

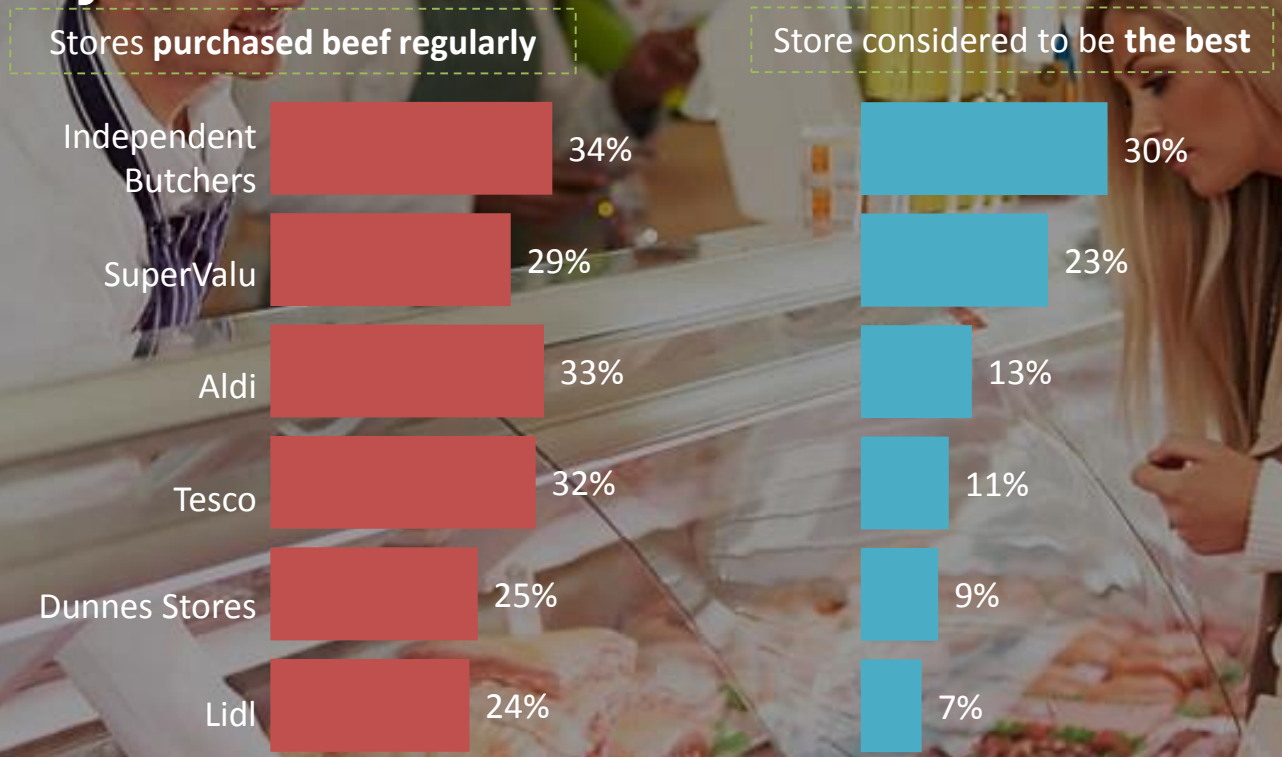
35%
Influential

ALDI

34%
Influential

DUNNES STORES

Independent Butchers and SuperValu lead in terms of desirability



Conversion from regular usage to being the best

88%

79%

39%

34%

36%

29%

Independent butchers just edge Tesco and Aldi in terms of regular beef purchase, However SuperValu perform very strongly in terms of convergence from regular usage to consideration of being the best.



The independent butcher ticks a number of distinct boxes

A trusted adviser

Variety

Theatre

Bord Bia
Irish Food Board

But is not without challenges…



The kilo factor!

The shock factor!

The time factor!

The fear factor!

SuperValu's In-Store Butcher presence has allowed them to differentiate from other retailers in the category



SuperValu
Real Food, Real People

52% Have a great butcher counter

50% Has a good range of beef available

47% The beef they sell is 100% Irish

37% Have sustainably sourced beef

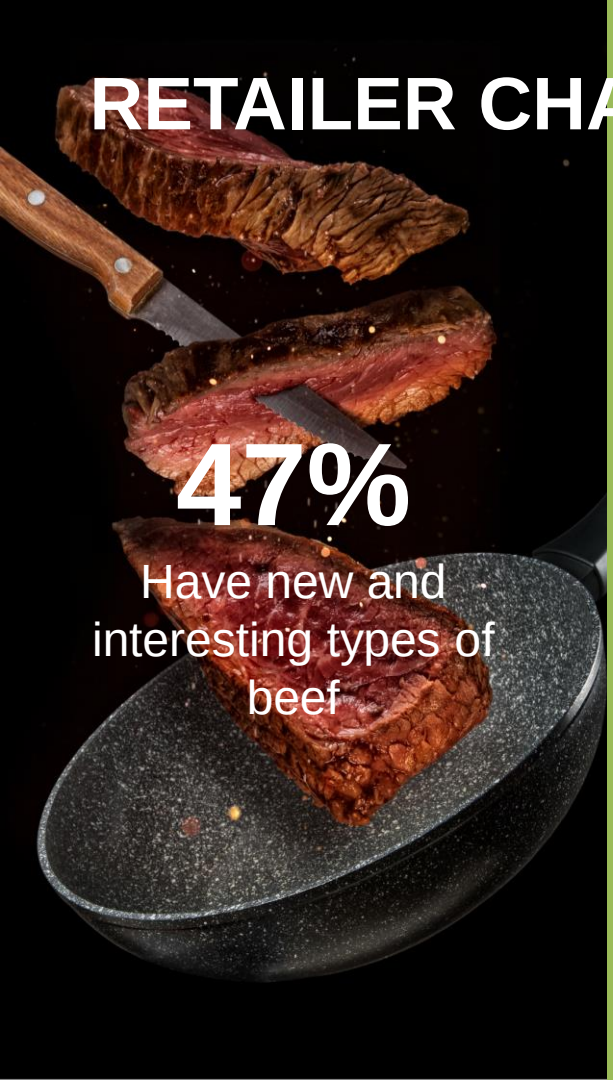
50% Has quality beef available

49% Has beef you would trust

44% Have knowledgeable staff when it comes to beef

33% Have a beef section I like to browse

RETAILER CHALLENGES



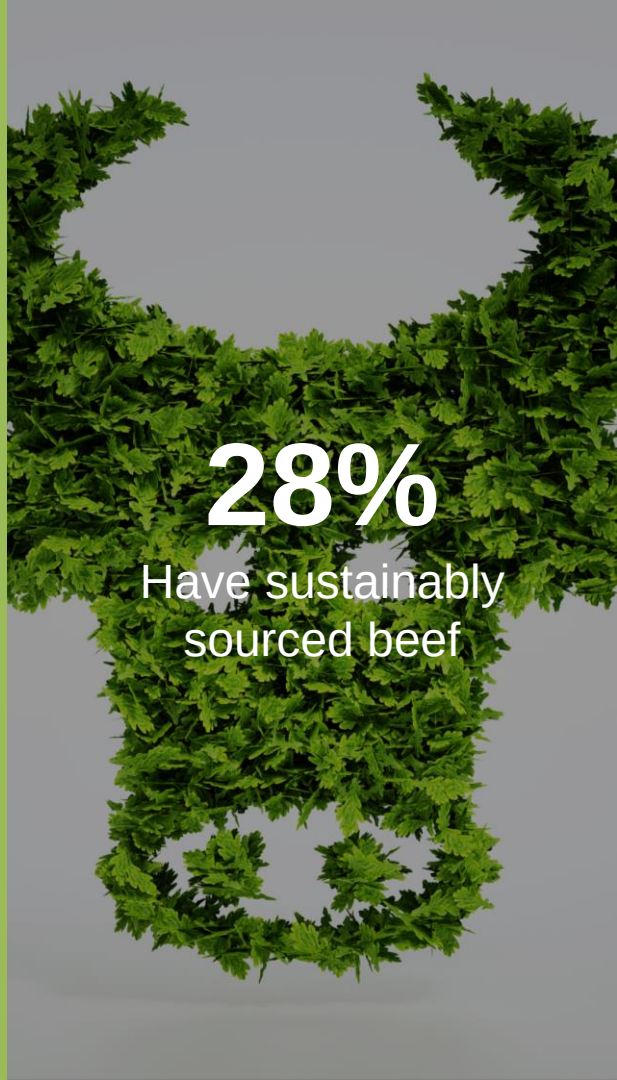
47%

Have new and interesting types of beef



36%

Have beef which is ethically produced



28%

Have sustainably sourced beef

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Category Dynamics

Consideration & Purchase Behaviour

Category Funnel Overview

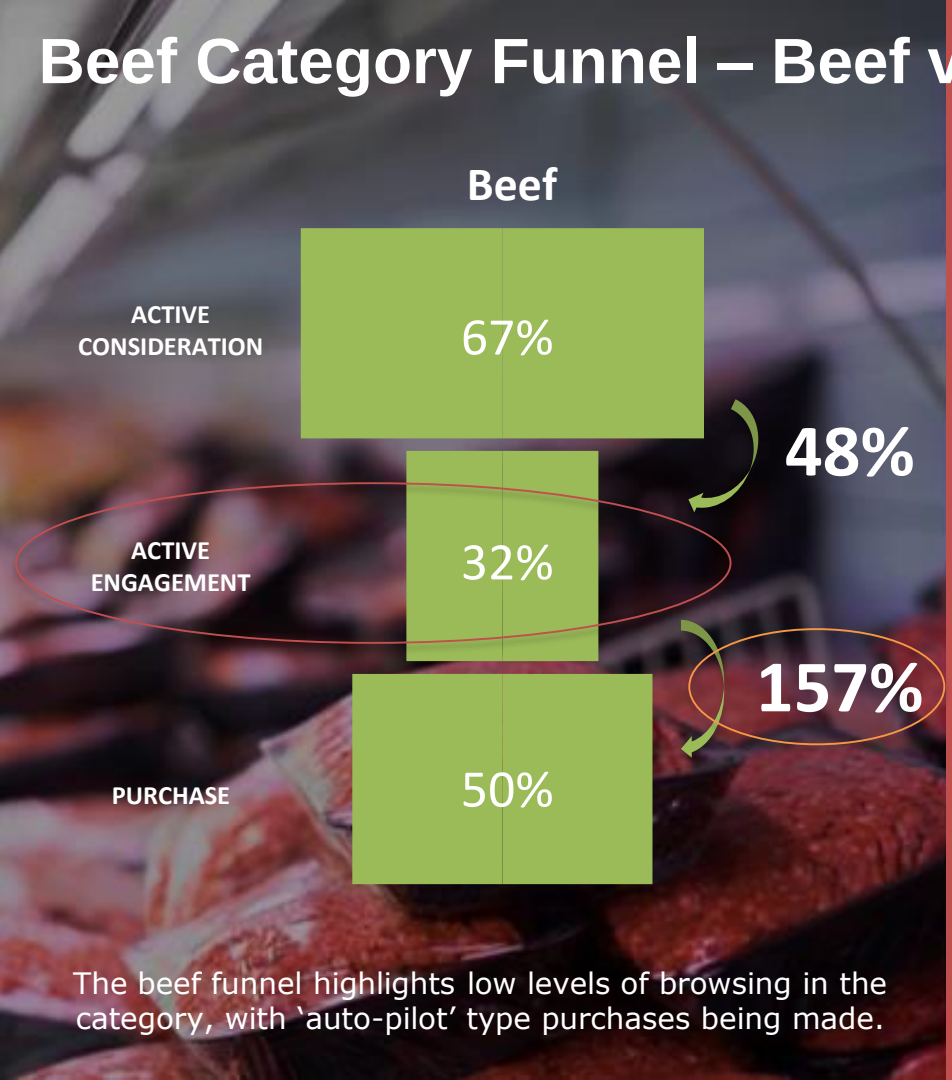
1. ACTIVE CONSIDERATION
2. ACTIVE ENGAGEMENT
3. PURCHASE



Conversion from **Active Consideration** to **Active Engagement**

Conversion from **Active Engagement** to **Purchase on last occasion**

Beef Category Funnel – Beef vs. Fish



The beef funnel highlights low levels of browsing in the category, with 'auto-pilot' type purchases being made.



The fish funnel records very high levels of conversion from active consideration to active engagement.

Reasons for Non-Consideration



Of regular beef considerers did not consider beef on the last occasion they were shopping for an evening meal

45%	Not in meals plans
24%	Pricing
24%	Health/Reducing Consumption
17%	Alternative options looked better
14%	Wanted Something Easier to Cook

Who Are the Non-Considerers of Beef?



- More likely to be aged 55+
- More likely to be higher social class
- More likely to be Dublin and Munster residents
- More likely to be Medium/Light Buyers

Types of Beef Considered on Last Occasion Shopping For Evening Meal



71%
Mince



63%
Steak



37%
Burgers



21%
Chuck/Diced/Stewing



19%
Round Roast



14%
Strips



9%
Rib Roast



8%
Housekeeper's Cut



5%
Rump

Reasons For Non-Consideration of Each Type of Beef



Mince

27% I felt like a change
21% It simply wasn't in my meal plans
18% Saw an alternative that looked good



Striploin/Sirloin

23% It's too expensive
20% It simply wasn't in my meal plans
15% Better deals on other types of beef



Burgers

22% It simply wasn't in my meal plans
20% I felt like a change
15% Wanted a healthier option



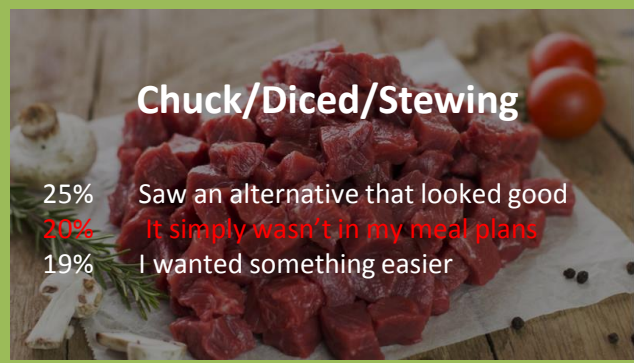
Fillet Steak

29% It's too expensive
21% It simply wasn't in my meal plans
14% Better deals on other types of beef



Round Roast

18% I wanted something easier
17% Better deals on "non-beef" products
10% Not for cooking during the week



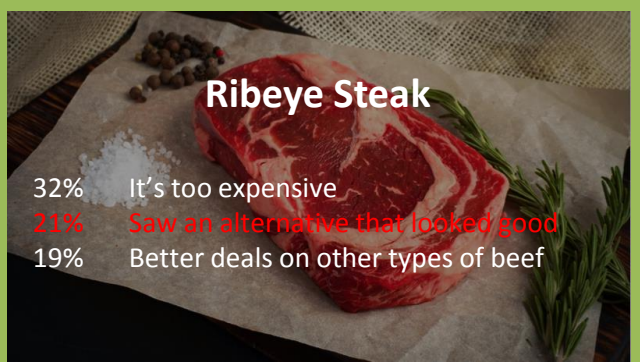
Chuck/Diced/Stewing

25% Saw an alternative that looked good
20% It simply wasn't in my meal plans
19% I wanted something easier



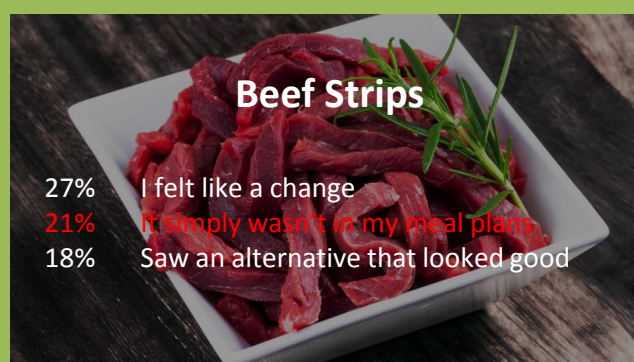
Peppered Steaks

26% Saw an alternative that looked good
16% The range available was poor
12% Other people in the house don't eat it



Ribeye Steak

32% It's too expensive
21% Saw an alternative that looked good
19% Better deals on other types of beef



Beef Strips

27% I felt like a change
21% It simply wasn't in my meal plans
18% Saw an alternative that looked good

People don’t see the value in premium cuts which often makes alternatives more attractive



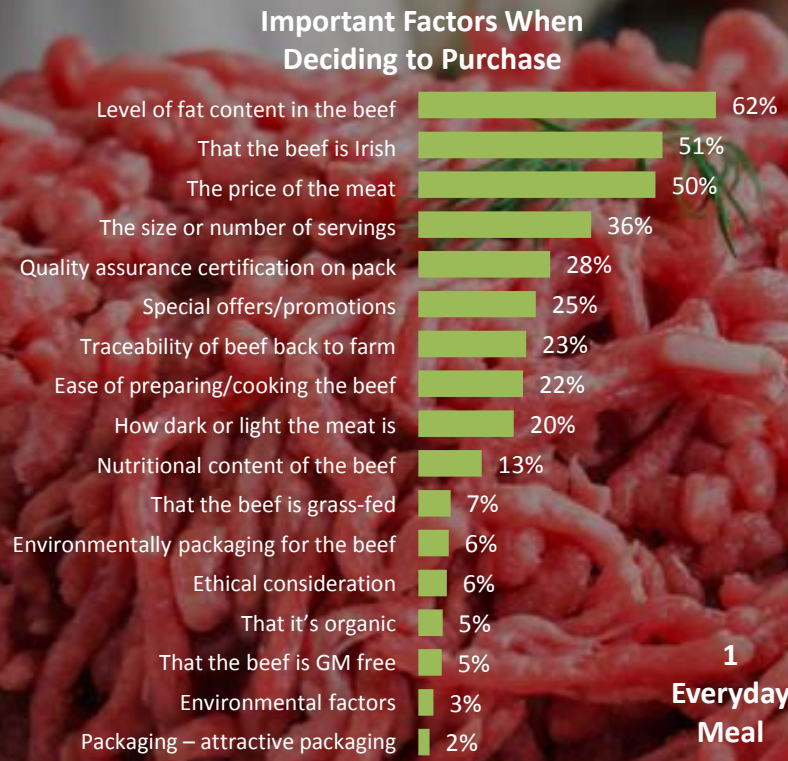
“It’s cheaper to go for a chicken if you’re feeding a family.”

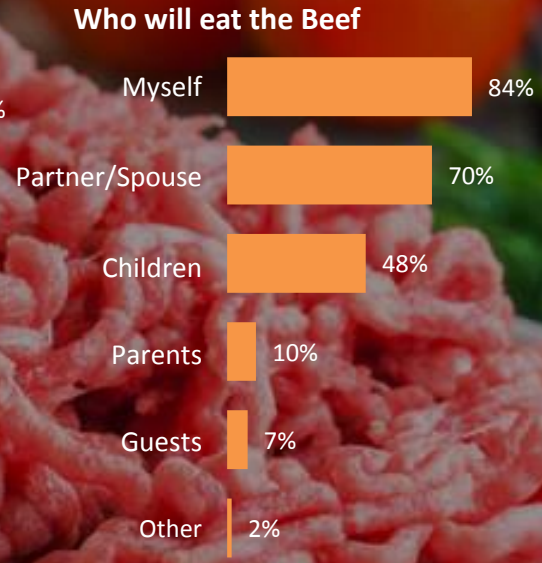
I love doing them [housekeepers cut] in the slow cooker, but I just find them so expensive now.

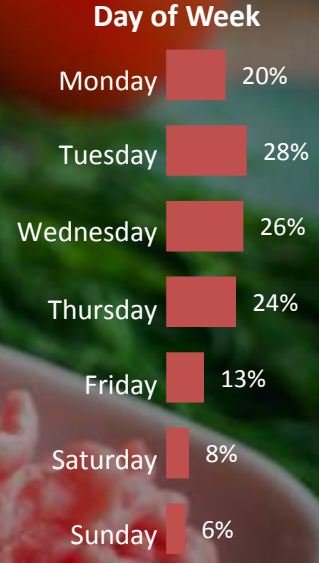
Roast beef would be St Stephen’s day, a special occasion, it shouldn’t be like that.

Promotion of more ‘family friendly ‘tasty’ cuts important to broaden understanding of beef and where it can fit within the weekly menu, outside of mince.

Overview of Purchase Behaviour for Mince









Fat content is a key factor when purchasing mince, with midweek usage to the fore. The occasion rating is towards the everyday end of the scale.

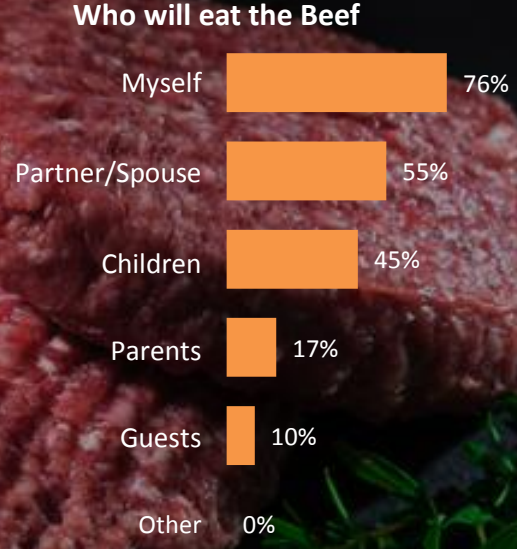
Overview of Purchase Behaviour for Sirloin/Striploin Steak

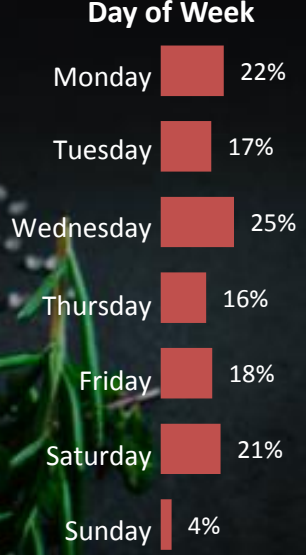


Price is more of a factor in the purchase of sirloin, with Saturday the most likely day for consumption. It is deemed not to be as special as ribeye.

Overview of Purchase Behaviour for Beef Burgers



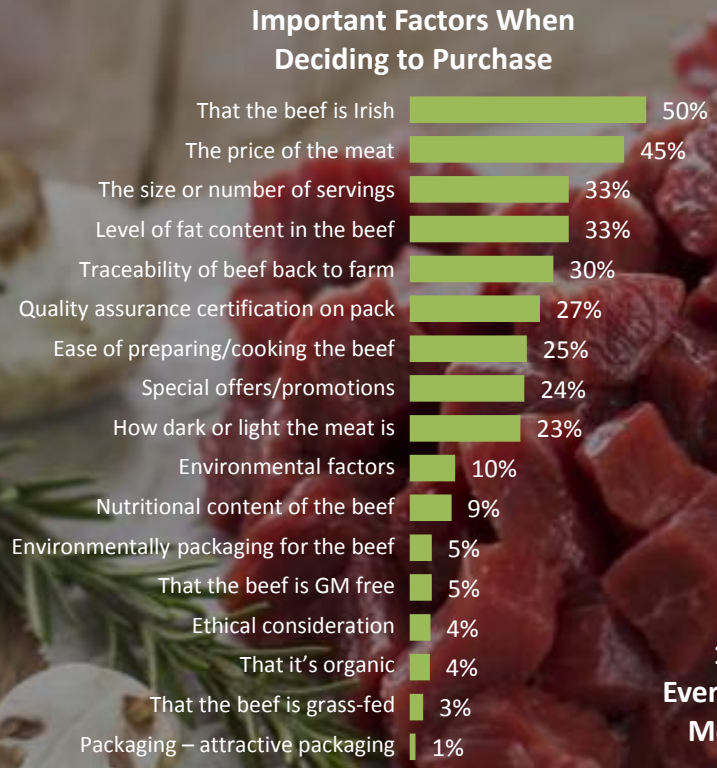


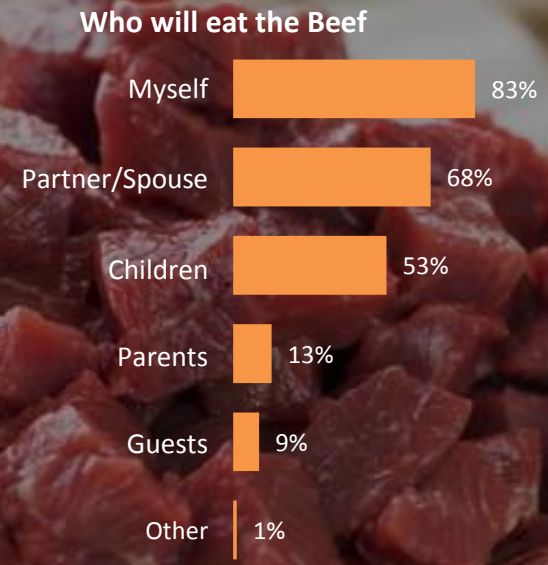


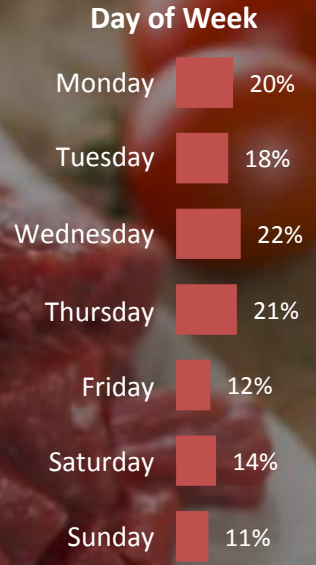


For beef burgers the level of fat contained is an important consideration, with usage across the week with the exception of Saturday.

Overview of Purchase Behaviour for Chuck/Diced Steak









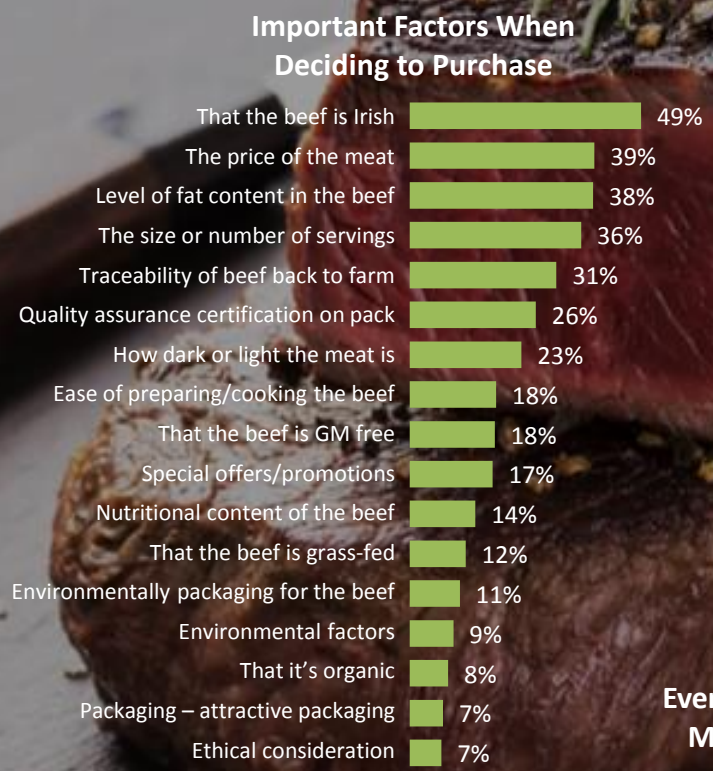
Being Irish and well priced are key considerations for chuck steak, with usage more likely to be towards the start/middle part of the week.

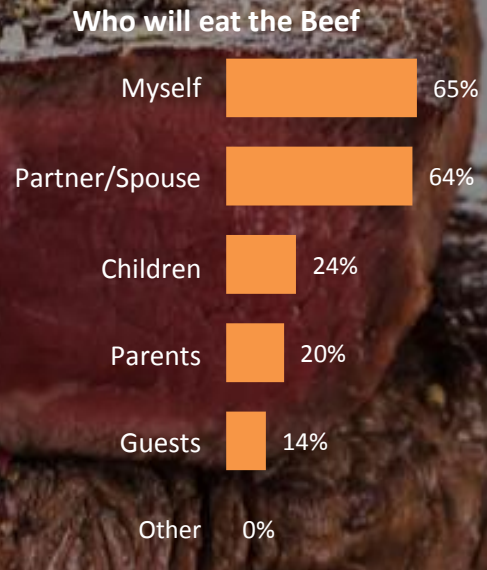
Overview of Purchase Behaviour for Ribeye Steak

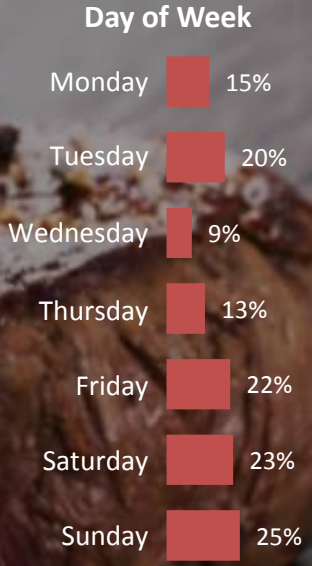


Ensuring the beef is Irish is key for ribeye steak, with usage evident across the week, although the occasion is a little more special than most types of beef.

Overview of Purchase Behaviour for Fillet Steak





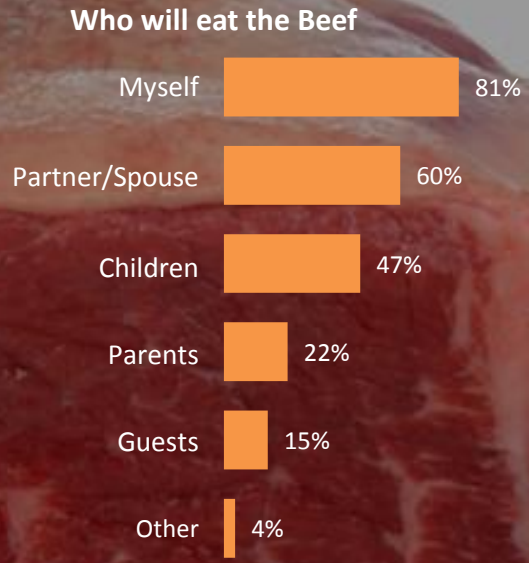


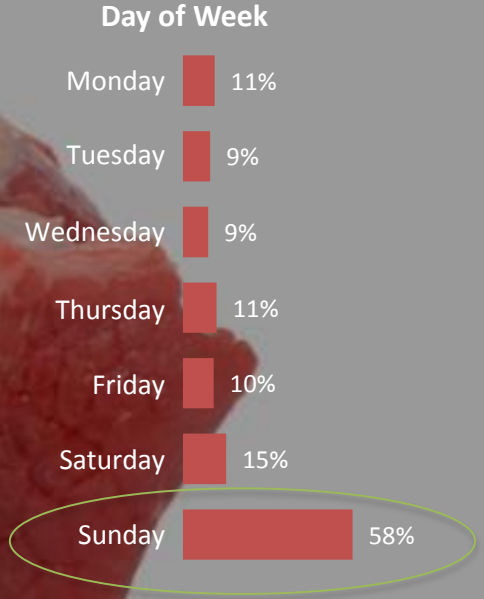


As with ribeye, ensuring the beef is Irish is important in the purchase of Fillet steak, with usage weighted more towards the weekend.

Overview of Purchase Behaviour for Round Roast









The price is as important as the beef being Irish for Round Roast, with occasion rating on the fancy side of the scale. High usage levels on Sundays.

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Category Dynamics

The role packaging plays

The language on pack is not helping the category

There is limited understanding of:

Weight and price

Flavour and taste

Cooking methods

Cattle breeds

Age statements

Current aesthetic and pack format have limitations and could work harder

Understanding of

(1) The colour of the meat

Understanding of

(2) The type of packaging

Less is more: Multivac. “shrink”

(3) Creating a sense of worth:

Cardboard!

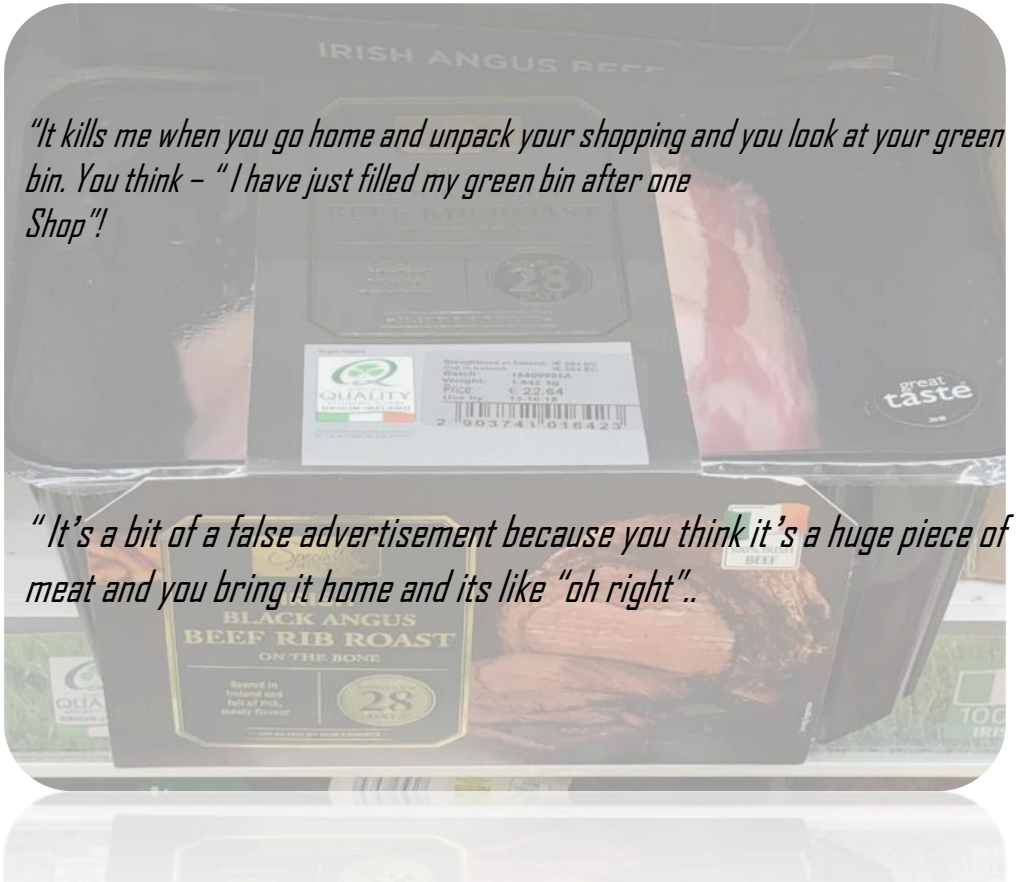
Transparent plastic while “the norm” holds the least appeal!



Managing Excess

A growing environmental concern

Overpackaging can be deceiving and frustrating



"It kills me when you go home and unpack your shopping and you look at your green bin. You think – " I have just filled my green bin after one Shop"!

" It's a bit of a false advertisement because you think it's a huge piece of meat and you bring it home and its like "oh right"..



Knowledge and comprehension of beef and how to cook is really limited even amongst frequent purchasers of steak and mince

No real education around cuts, quality and flavour profiling

People then tend to have a narrow view of usage and the range from which they purchase

GIVE PEOPLE A REASON TO MAKE BEEF PART OF THE MEAL PLAN!

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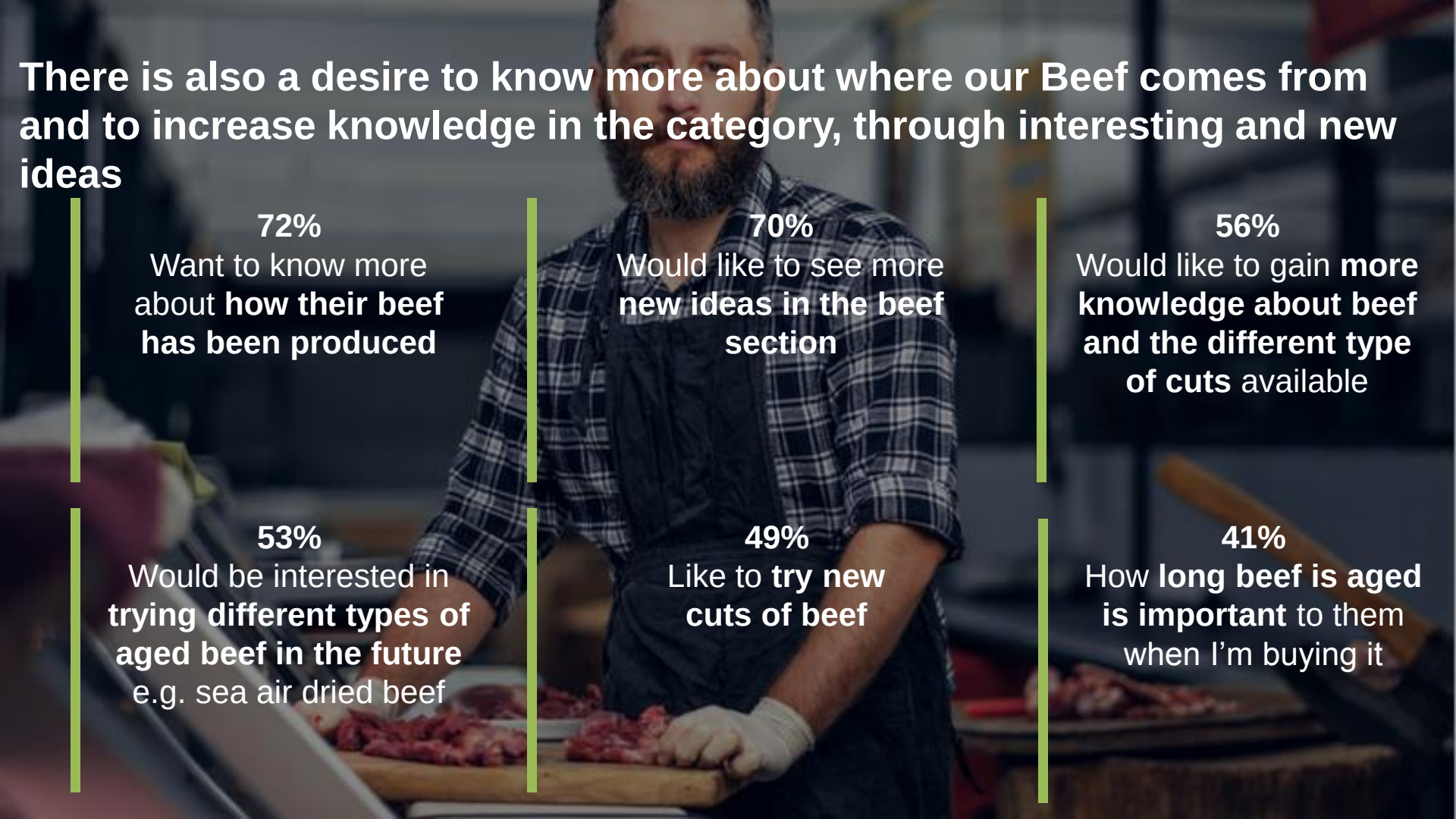
Opportunities to Drive Purchase Beef Futures



While Irishness is a key factor in selection of beef, quality marks, farmers on pack are all just hygiene factors

New territories need to be explored to drive motivation to purchase



There is also a desire to know more about where our Beef comes from and to increase knowledge in the category, through interesting and new ideas

72%
Want to know more about **how their beef has been produced**

70%
Would like to see more **new ideas in the beef section**

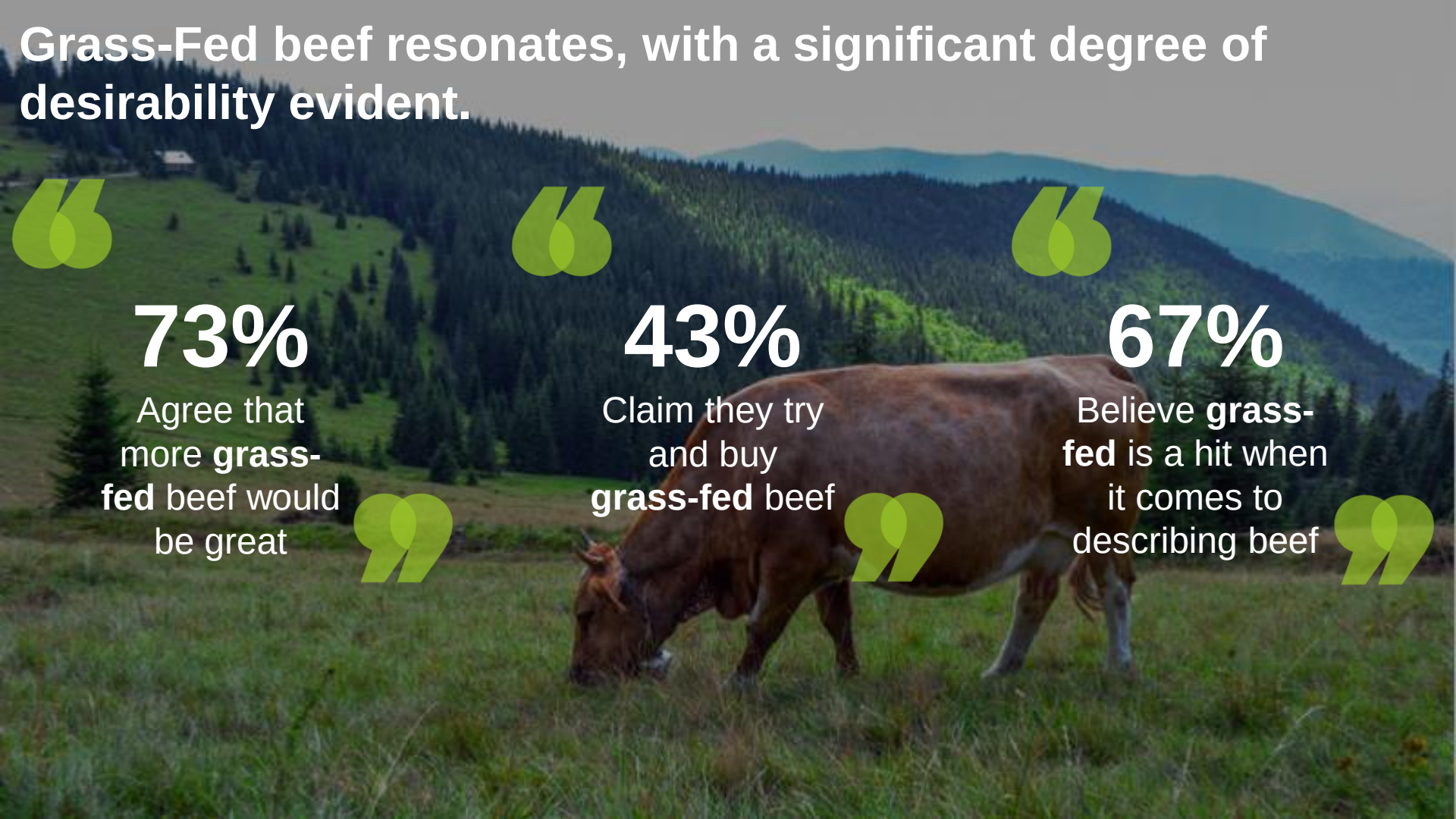
56%
Would like to gain **more knowledge about beef and the different type of cuts** available

53%
Would be interested in **trying different types of aged beef in the future** e.g. sea air dried beef

49%
Like to **try new cuts of beef**

41%
How **long beef is aged is important** to them when I'm buying it

Grass-Fed beef resonates, with a significant degree of desirability evident.



73%

Agree that more **grass-fed** beef would be great

43%

Claim they try and buy **grass-fed** beef

67%

Believe **grass-fed** is a hit when it comes to describing beef

Beef Which is GMO Free also resonates…



55%
Believe **GMO Free** is a hit when it comes to describing beef

54%
Would like to have a **GMO-Free option in beef**

37%
try and buy beef which is GMO-Free

Both of which can help further drive the positive health conations of beef for many…

71%

Agree that they would like if there were **more healthy beef options**



68%

Agree that beef is an important part of **their nutrition**

1. Process

2. Health

3. Education

4. Occasion

5. Presentation

6. Ready to go

BUILDING BEEF FUTURES

1. Process

Tell the Grassfed and
the GMO Story.

Inherent within this is the Irish story!



2. Health

Tell a story of nourishment

Build knowledge about the inherent health credentials of meat for eg B12, magnesium, zinc, etc

Why beef is a good healthy protein alternative

Create healthier lean lines

The role of fat



3. Education

Educate around the processes

Ways to cook different cuts: how long to cook, How best to cook, the role of fat

What the ageing process does, dry aged – Number of days, etc

Role of different herds

Creating a languuage around taste

Role of cuts for different health benefits (protein consumers versus kids needs, etc)



4. Occasion

Give people a reason to consider

Create cuts that address different days of week

Family occasions versus indulgent moments versus Creation of cuts for “portion” eating..

Consider packaging that is reflective of these



5. Presentation

Consider the power of theatre in store!

Show it in lights! Celebrate Irish beef

Create some warmth through colour,
grass imagery, etc

Show cooked product



6.
Ready to go

Create more ready made or ready to cook options akin to other protein alternatives

Create appropriate pairings or facilitate with Adjacent seasonings, condiments, etc

Consider single person households and the ways they cook –catering for the weekly prepping, etc!



With credit to our great image sources:









The Thinking House

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End…Questions.