







December 2021

European Meat Shopper Insight Tracker

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=500**	**N= 500**	**N= 500**	**N= 500**	**N= 500**	**N= 500**	**N= 500**

The results of this report focus on the behaviour in Sep – Oct 2020 vs. Sep – Oct 2021.

BORD BIA
Thinking House

1.

Generally positive for beef across markets among beef considerers. But the universe of beef shoppers is declining, especially in UK and Ireland.

Growing lamb opportunity as consideration is increasing in Ireland, Germany and Italy.

Overall consideration levels for beef have dropped amongst all grocery shoppers, significantly so in Ireland as it comes into line with beef consideration across Europe

Consideration of beef for an evening meal

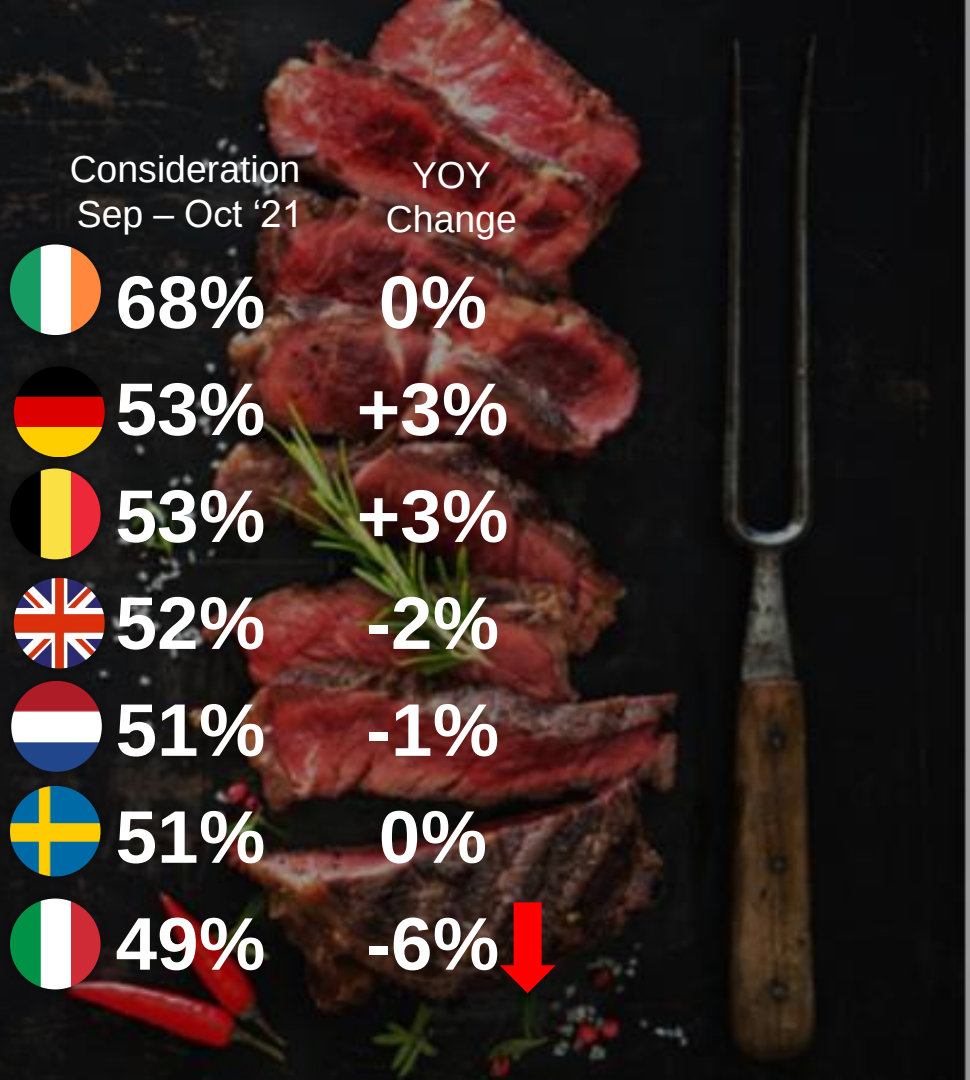
	Sep – Oct '21	YOY Change
	78%	-2%
	76%	+3%
	76%	-1%
	74%	-4%
	73%	-8%
	69%	-4%
	67%	-2%

Driven by decreases across both genders (although more pronounced amongst females). Decline most pronounced amongst those aged 18-34, but also present amongst 35-54's. No decline recorded amongst those aged 55+. We can put a lot of this down to sustainability concerns.

BORD BIA Thinking House

(Base: All Grocery Shoppers)

Amongst beef shoppers, consideration is positive in Germany and Belgium, but down significantly in Italy



	Consideration Sep – Oct ‘21	YOY Change
Ireland	68%	0%
Germany	53%	+3%
Belgium	53%	+3%
UK	52%	-2%
Netherlands	51%	-1%
Sweden	51%	0%
Italy	49%	-6% ↓

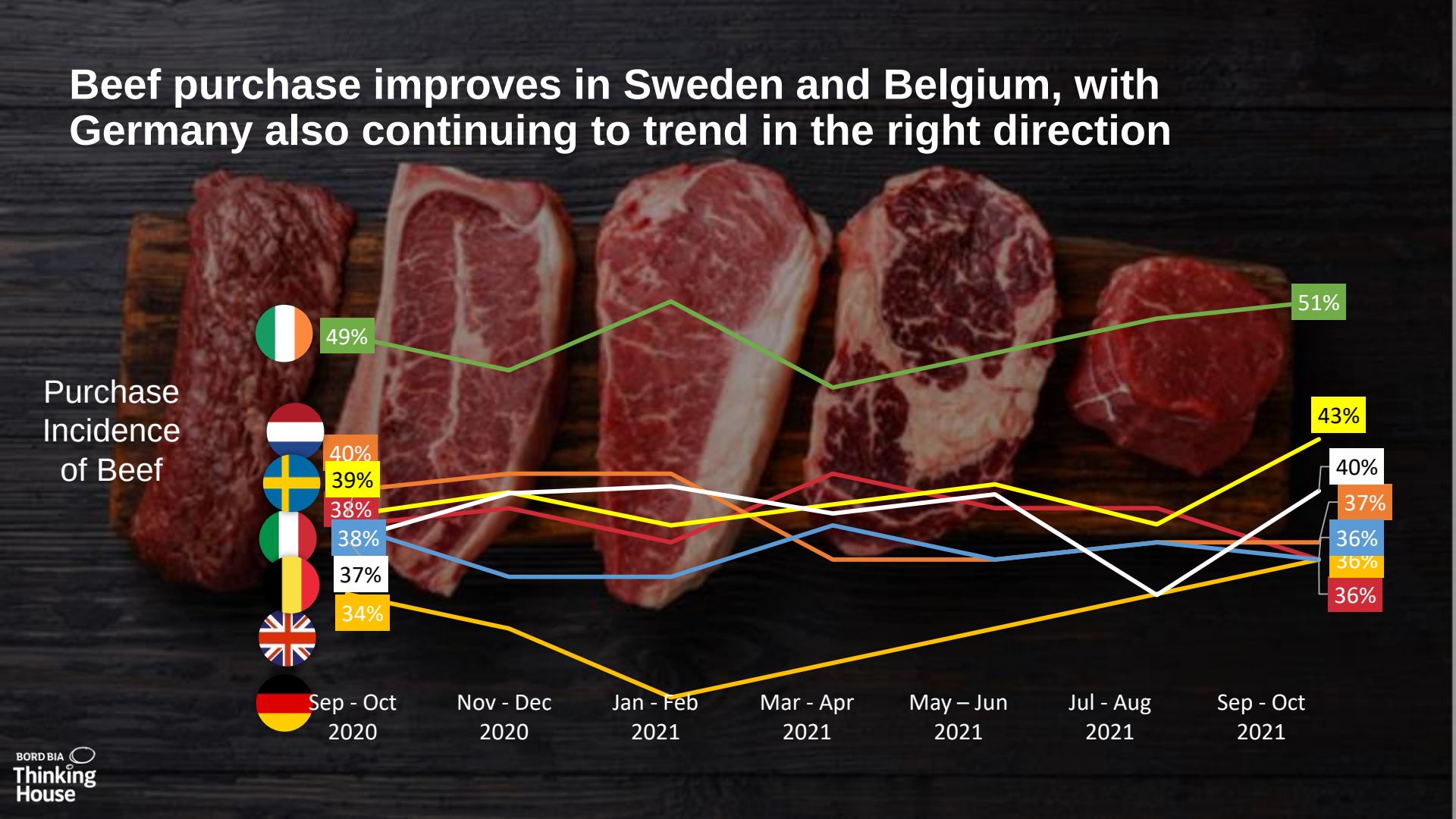
(Base: All Beef Considerers)

Positive growth in Germany continues, while Italy is in decline. Most markets improve after a decline in the previous wave



(Base: All Beef Considerers)

Beef purchase improves in Sweden and Belgium, with Germany also continuing to trend in the right direction



BORD BIA Thinking House

The Purchase of Steak is on the Rise in most markets

	Sep – Oct '21	YOY Change	
	69%	7%	No one format has increased significantly year-on-year but more repertoire purchase evident
	52%	5%	Driven by an increase in fillet and ribeye steak
	41%	4%	Driven by an increase in ribeye steak
	40%	5%	Driven by an increase in ribeye steak
	22%	7%	Driven by an increase in fillet steak

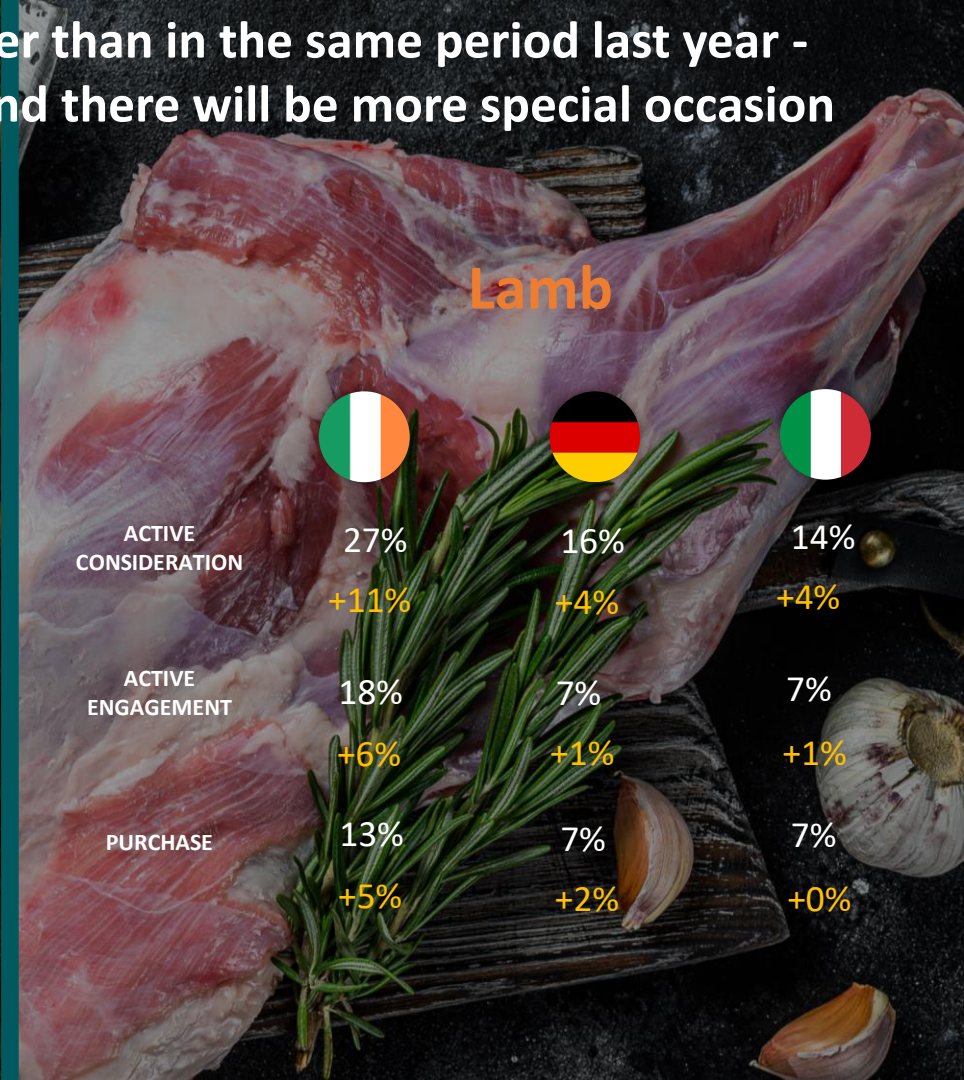
(Base: All Beef Considerers who purchased beef on the last occasion)

Consideration of turkey and lamb are higher than in the same period last year - shoppers are looking for something new and there will be more special occasion meals than at Xmas 2020



Turkey

	Consideration Sep – Oct '21	YOY Change
🇩🇪	36%	3%
🇮🇹	35%	3%
🇧🇪	22%	2%
🇮🇪	22%	10%
🇬🇧	19%	2%
🇳🇱	13%	5%
🇸🇪	11%	0%



Lamb

	🇮🇪	🇩🇪	🇮🇹
ACTIVE CONSIDERATION	27% +11%	16% +4%	14% +4%
ACTIVE ENGAGEMENT	18% +6%	7% +1%	7% +1%
PURCHASE	13% +5%	7% +2%	7% +0%

1.

Generally positive for beef across markets among beef considerers. But the universe of beef shoppers is declining, especially in UK and Ireland.

Growing lamb opportunity as consideration is increasing in Ireland, Germany and Italy.

BORD BIA Thinking House

Overall consideration and engagement of beef in Italy may need some focus as these metrics decline year-on-year. This could be an opportunity for Italian retailers to utilise Irish beef to re-invigorate consideration and engagement with beef category.

In Ireland and UK we're seeing an impact of greater sustainability concerns as the universe of beef buyers is declining. Keeping shoppers in the category is all about assuaging fears around welfare and sustainability. Grass-fed, stories about the producers and even sustainable packaging can help here.

BORD BIA
Thinking House

2.

Expensiveness is a consistent barrier to consideration.

Negative associations towards beef are increasing and need to be monitored.

Barrier to considering beef on the last occasion

Expensiveness is continuing to play a key role as a barrier to consideration in most markets, increasing year-on-year in all markets except Belgium. The perceived cost of beef means a growing number of shoppers are not considering purchasing before they enter the store.

Not being in Meal plans is still the main barrier to overcome, but it is reducing in key markets

	Sep – Oct '21	Rank	YOY Change
	25%	2	+6%
	20%	2	+2%
	19%	2	+4%
	15%	3	+3%
	12%	3	-3%
	11%	5	+3%
	11%	5	+2%

BORD BIA Thinking House

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

Desire for change is still a prevalent barrier to consideration, with health concerns impacting some markets

Felt like a change

	Sep – Oct 21	YOY Change
	19%	+2%
	18%	+2%
	16%	0%
	14%	+3%
	13%	+2%

While not increasing, it is still the main barrier in these markets

 27%

 25%

Trying to reduce my intake of beef

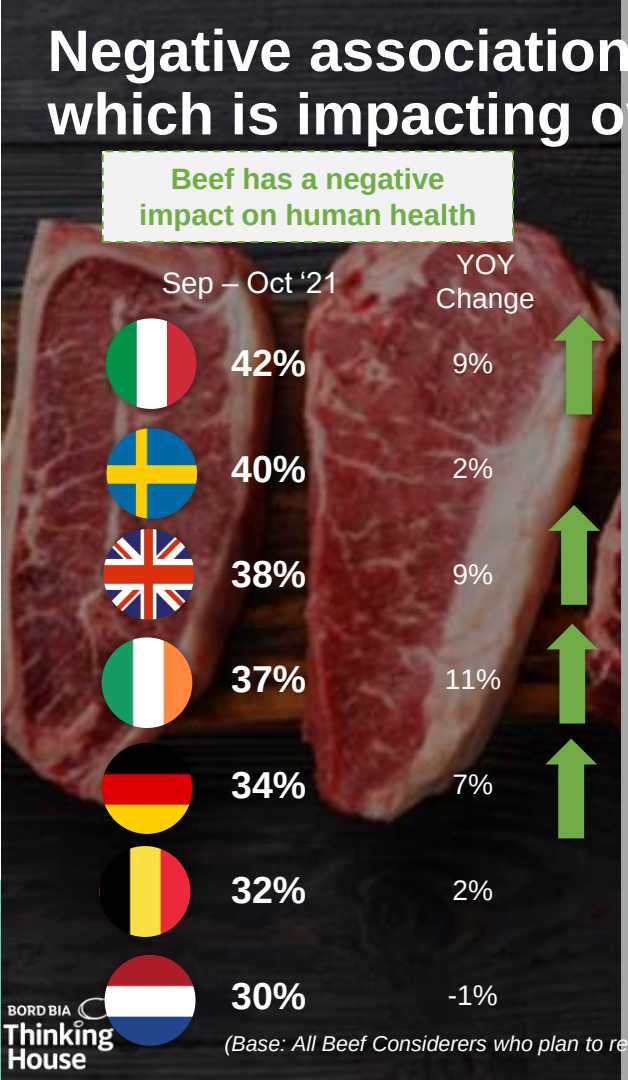
	Sep – Oct 21	YOY Change
	20%	+9%

Wanted a healthier option

	8%	+3%
	12%	+4%
	11%	+4%

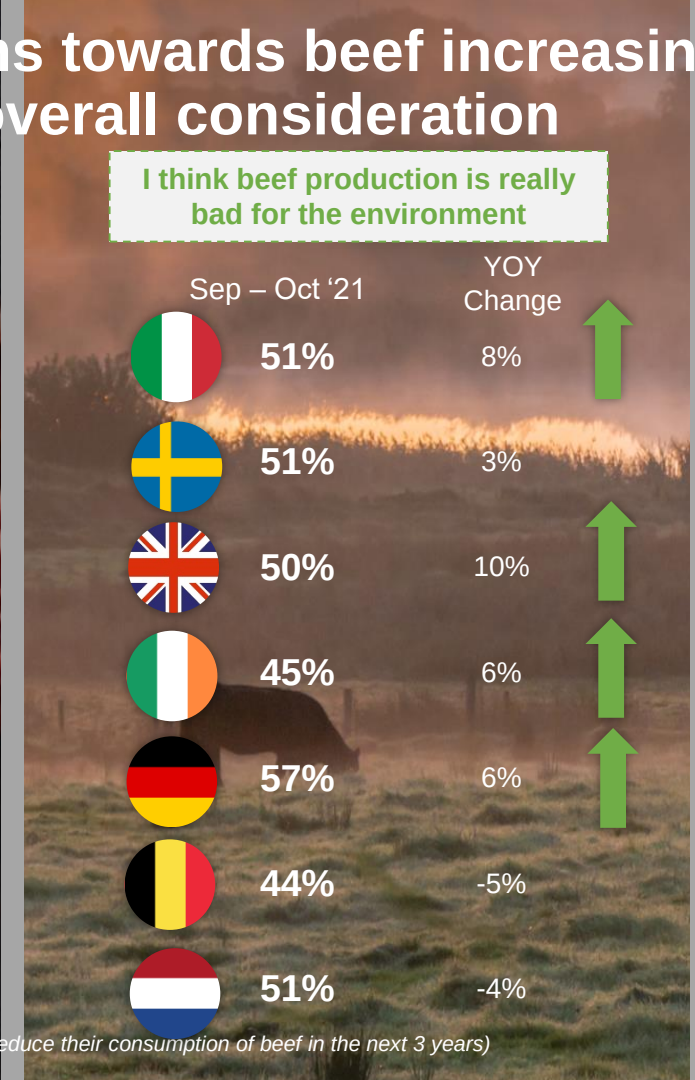
(Base: All Beef Considerers who did not consider beef on the last occasion)

Negative associations towards beef increasing in most markets, which is impacting overall consideration



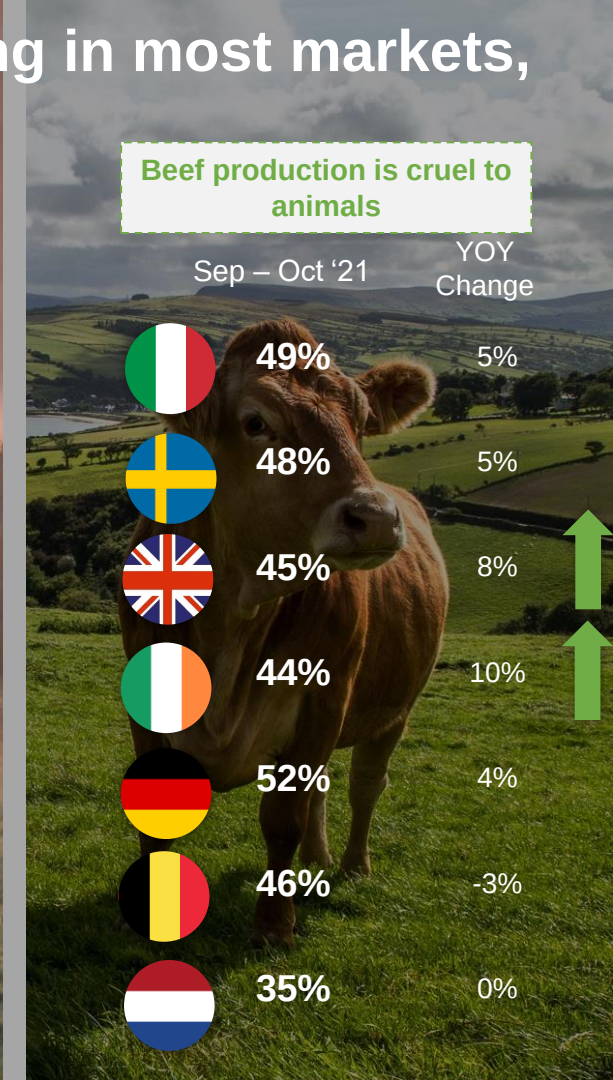
Beef has a negative impact on human health

	Sep – Oct '21	YOY Change
	42%	9%
	40%	2%
	38%	9%
	37%	11%
	34%	7%
	32%	2%
	30%	-1%



I think beef production is really bad for the environment

	Sep – Oct '21	YOY Change
	51%	8%
	51%	3%
	50%	10%
	45%	6%
	57%	6%
	44%	-5%
	51%	-4%



Beef production is cruel to animals

	Sep – Oct '21	YOY Change
	49%	5%
	48%	5%
	45%	8%
	44%	10%
	52%	4%
	46%	-3%
	35%	0%

(Base: All Beef Considerers who plan to reduce their consumption of beef in the next 3 years)

BORD BIA Thinking House

However, positives are also increasing suggesting lots of space for positive messaging around beef to keep shoppers in the category

Beef is the best source of animal protein you can buy

	Sep – Oct '21	YOY Change
	68%	7%
	67%	3%
	64%	6%
	64%	1%
	62%	10%
	58%	2%
	56%	0%

I think beef is the least processed of all meats

	Sep – Oct '21	YOY Change
	64%	4%
	51%	5%
	53%	2%
	55%	6%
	61%	9%
	53%	0%
	47%	-4%

(Base: All Beef Considerers)

BORD BIA Thinking House

2.

Expensiveness is a consistent barrier to consideration.

Negative associations towards beef are increasing and need to be monitored.

BORD BIA Thinking House

Opportunity for Irish Beef to support and help turnaround the increase in negative perceptions, by dialling up the positive attributes of Irish Beef such as grass-fed, sustainable processes, green pastures etc. Positive associations remain strong and can be leveraged in communications that can assuage consumer fears around sustainability. This can improve the value perception of beef also.

BORD BIA
Thinking House

3.

Consumption levels are quite consistent but expected future consumption is trending downwards, with health a key concern

The NET consumption position of beef is moving in the right direction in most Belgium, but is something of a watch-out in Italy and The Netherlands

The key elements driving the reduction in beef consumption are:

- The desire to reduce meat consumption overall
- Perceived expensiveness
- Animal welfare
- Environmental concerns

	NET CONSUMPTION (Proportion Consuming More Beef vs. Less Beef)	YOY Change
	-3%	1%
	-8%	3%
	-11%	0%
	-12%	-5%
	-14%	-4%
	-15%	-1%
	-17%	-2%

(Base: All Beef Considerers)

There is a growing expectation that beef consumption will be reduced in the future, with Ireland and The UK increasing in this regard. We're seeing the impact of this in overall consideration levels. Less but better quality will be a way to engage these shoppers.

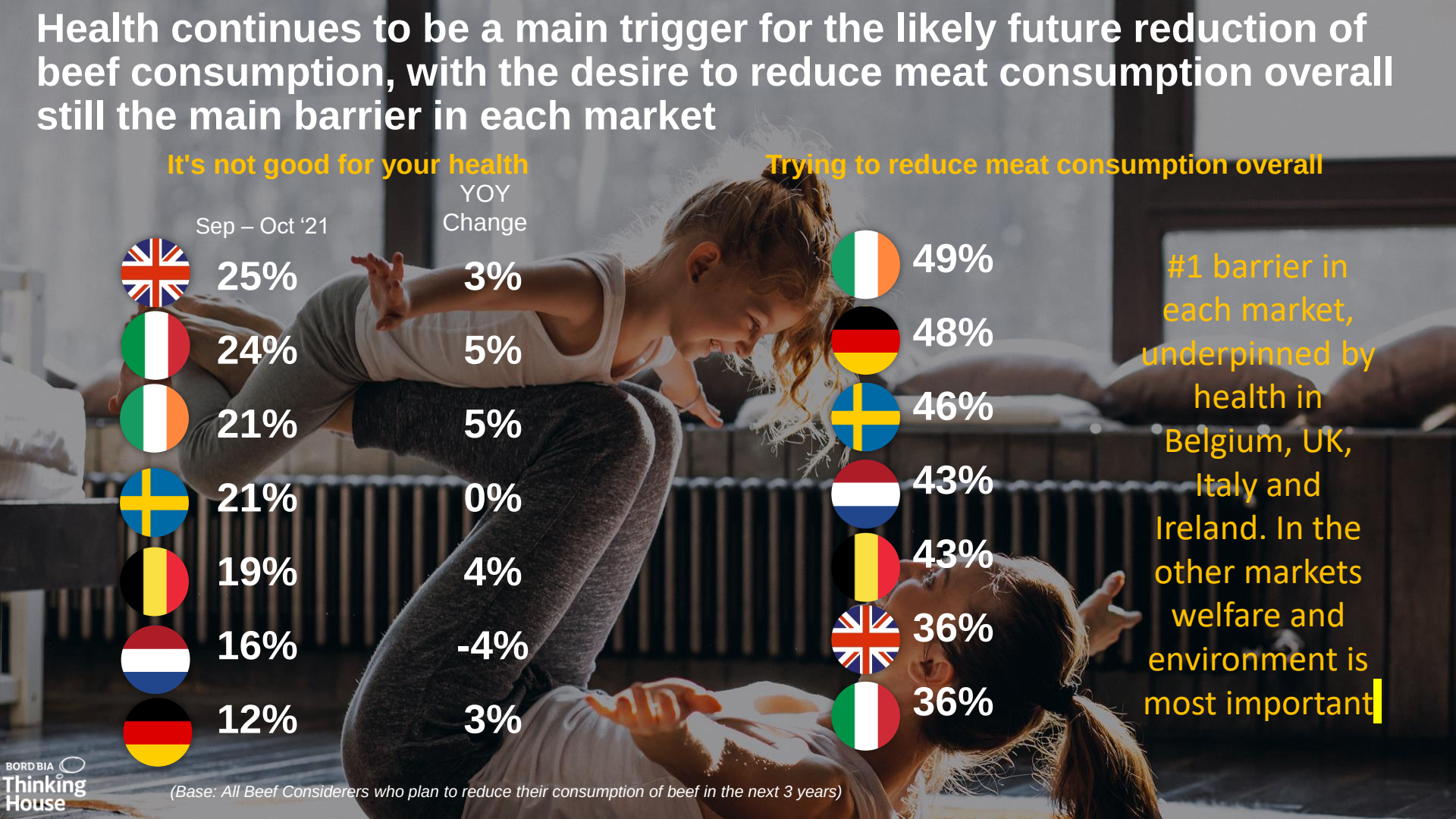
Intended Consumption of Beef Over the Next 3 Years

	Sep – Oct '21 NET CONSUMPTION (Proportion Claiming to Consume More vs. Less)	YOY Change – a negative score here means an expected decrease in consumption
	-44%	-1%
	-35%	-1%
	-34%	-9%
	-32%	-5%
	-30%	-9%
	-29%	0%
	-28%	2%

(Base: All Beef Considerers)

BORD BIA Thinking House

Health continues to be a main trigger for the likely future reduction of beef consumption, with the desire to reduce meat consumption overall still the main barrier in each market



It's not good for your health

	Sep – Oct '21	YOY Change
	25%	3%
	24%	5%
	21%	5%
	21%	0%
	19%	4%
	16%	-4%
	12%	3%

Trying to reduce meat consumption overall

49%
48%
46%
43%
43%
36%
36%

#1 barrier in each market, underpinned by health in Belgium, UK, Italy and Ireland. In the other markets welfare and environment is most important

(Base: All Beef Considerers who plan to reduce their consumption of beef in the next 3 years)

BORD BIA Thinking House

3.

Consumption levels are quite consistent but expected future consumption is trending downwards, with health a key concern

BORD BIA Thinking House

Essential to dial-up the health benefits of beef, and providing healthy meal inspiration that can put beef at the heart of a balanced diet. If feasible, communicate any unique health benefits of grass-fed beef.

BORD BIA
Thinking House

4.

Sustainable and Ethically reared beef can help drive persuasion and drive against trends away from beef. Quality beef is now synonymous with sustainable production.

Interest for Irish beef across key formats in all regions.

Sustainable and ethically reared beef remains a strong draw but there may be slight nuances needed in the language used across markets to drive persuasion

	Beef which has been reared ethically (animal welfare)		Beef which is produced to be sustainable	
	Sep – Oct '21	Rank	Sep – Oct '21	Rank
	34%	2	24%	9
	33%	1	30%	3
	31%	4	35%	2
	28%	2	26%	4
	26%	8	26%	9
	25%	3	18%	9
	21%	3	26%	2

(Base: All Beef Considerers)

Consistently strong interest in Irish versions of key cuts, although there has been a significant drop in the UK



Steaks						
Sep – Oct ‘21	40%	51%	50%	47% ↓	30%	59%
Burgers						
Sep – Oct ‘21	32%	34%	27% ↑	32%	19%	28%
Roasts						
Sep – Oct ‘21	25%	37%	35%	42%	29%	26%

(Base: All Beef Considerers)

Changes referenced are versus previous wave

As with the interest in Irish steaks, there has been a reduction in the desire for grass-fed steaks in the UK wave-on-wave – although levels remain high



Steaks						
Sep – Oct '21	39%	59%	52%	49% ↓	40%	64%
Burgers						
Sep – Oct '21	30%	38%	28%	33% ↑	26%	31%
Roasts						
Sep – Oct '21	26%	44%	40%	45%	37%	29%

BORD BIA Thinking House

(Base: All Beef Considerers) *Changes referenced are versus previous wave*

4.

Sustainable and Ethically reared beef can help drive persuasion and drive against trends away from beef. Quality beef is now synonymous with sustainable production.

Interest for Irish beef across key formats in all regions.

BORD BIA Thinking House

Tailor your messages for the market. Those in Italy, Germany and Sweden are focused on sustainable elements of production. For the Dutch it's about value and the environment. For Irish, Belgian and UK shoppers highlight value, taste and quality.

There is a high degree of openness to grass-fed and Irish options on-shelf. Opportunity for Irish Beef and especially grass-fed beef, to ensure it is widening the range of formats including and in addition to steaks to cater to the strong levels of interest across regions.









Thank You

BORD BIA
Thinking House

empathy