

September 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=375**	**N=375**	**N=375**	**N=375**	**N=375**	**N=375**	**N=375**

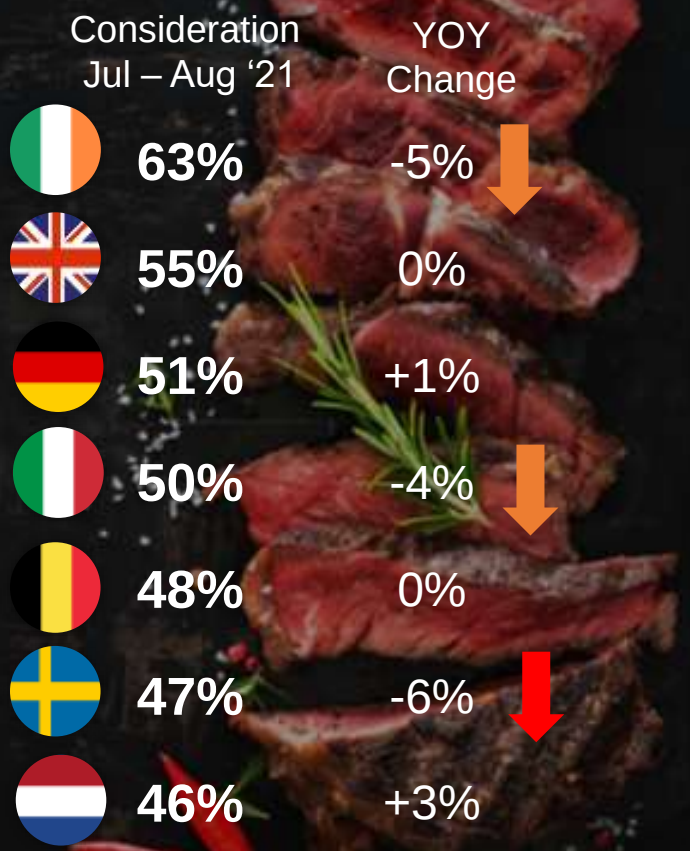
The results of this report focus on the behaviour in Jul – Aug 2020 vs. Jul – Aug 2021.

BORD BIA
Thinking House

1.

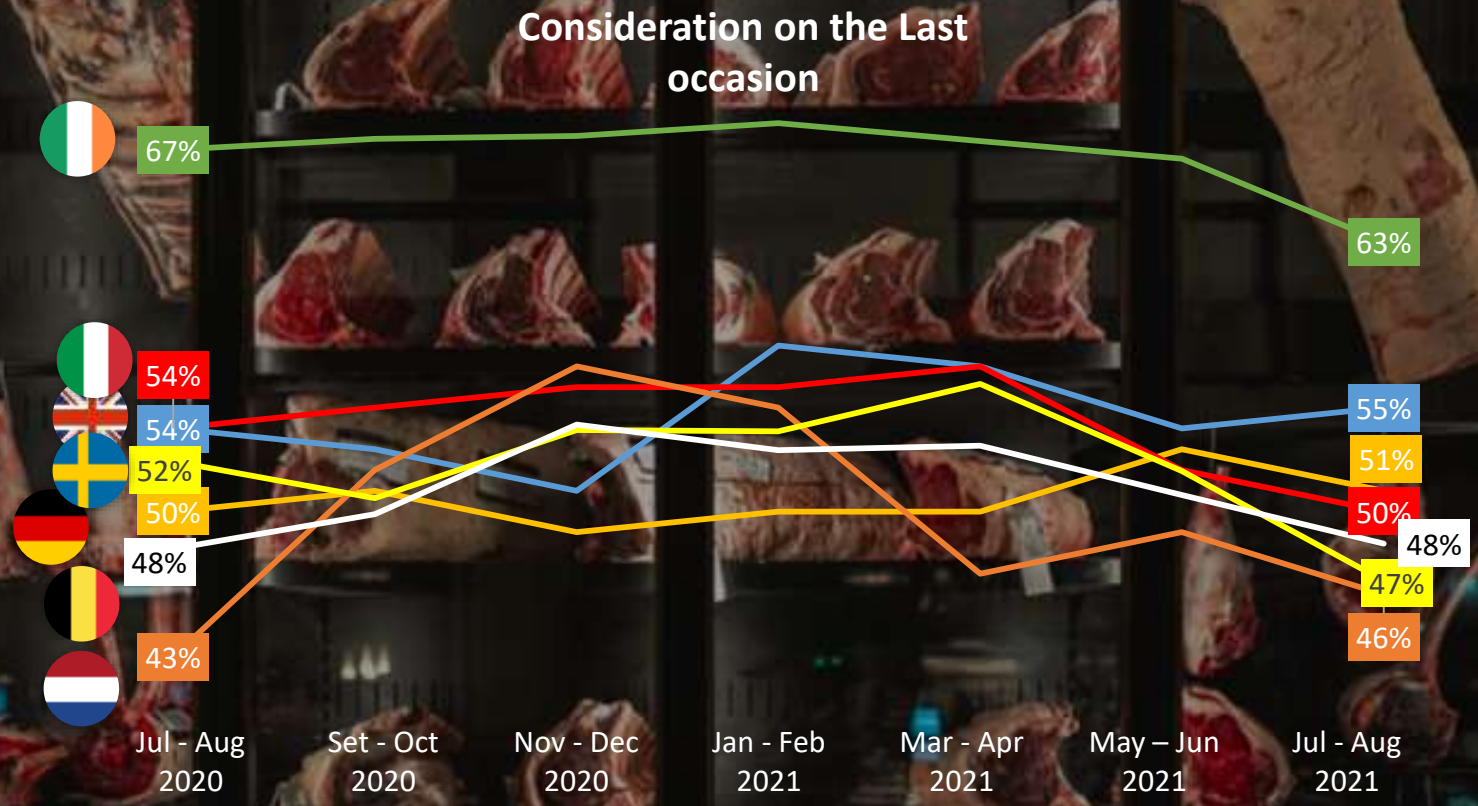
Consideration and Engagement levels are declining in some markets, although purchase incidence is improving

Consideration is for the most part either unchanged or reducing across the markets.



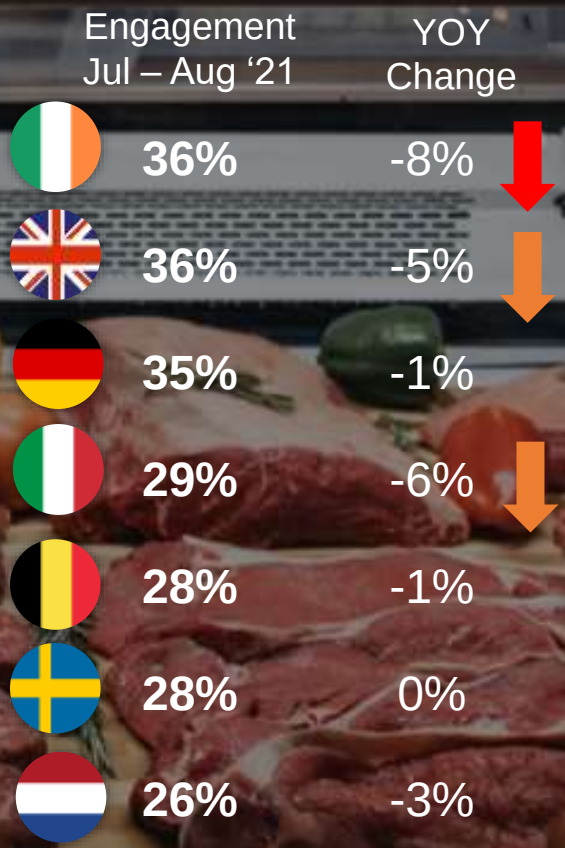
(Base: All Beef Considerers)

Consideration is trending down in Ireland, Sweden and Italy, with The Netherlands moving in the right direction



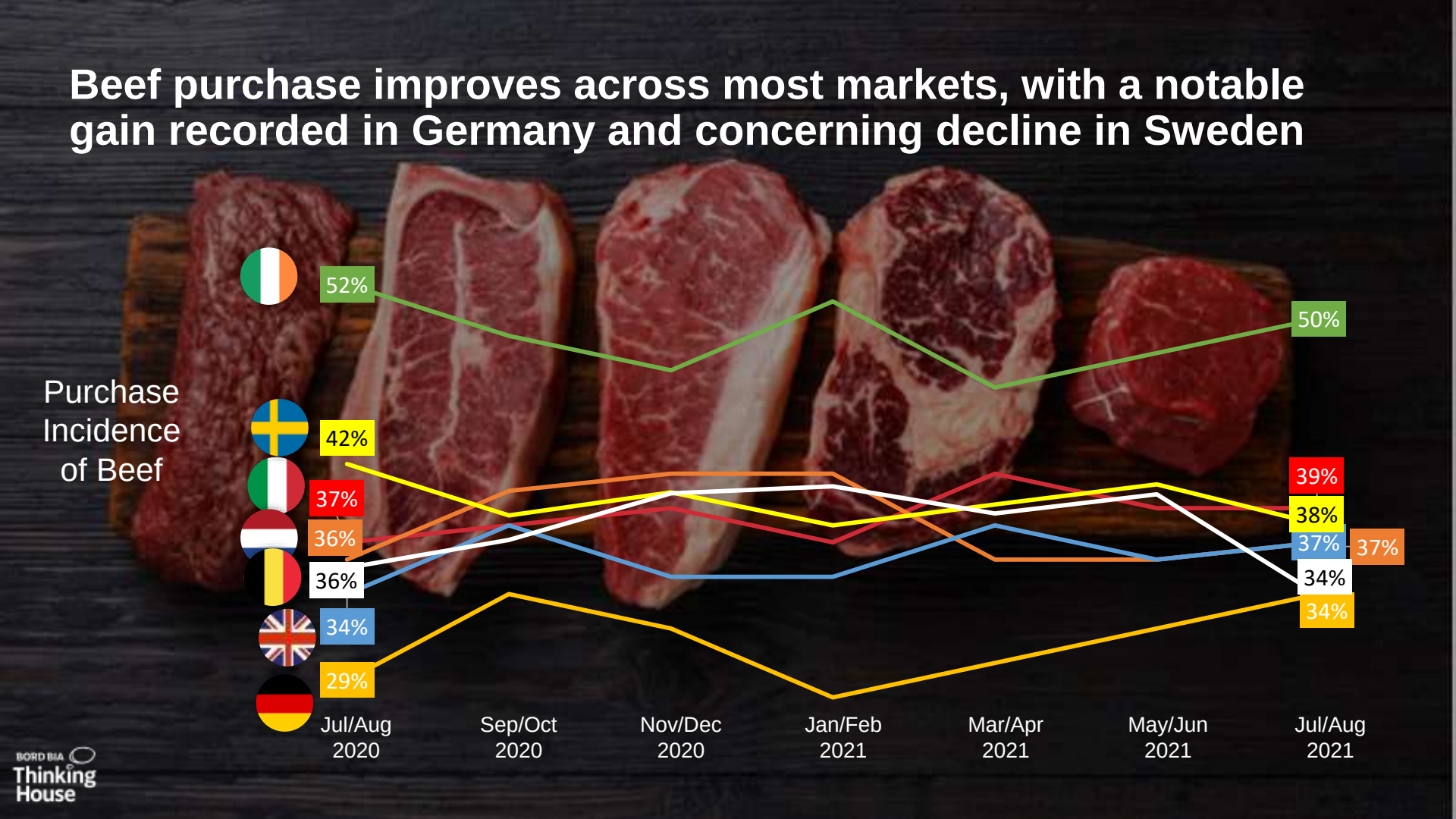
(Base: All Beef Considerers)

Engagement is also trending downwards in most markets – meaning more excitement, variation needed in the category



(Base: All Beef Considerers)

Beef purchase improves across most markets, with a notable gain recorded in Germany and concerning decline in Sweden



BORD BIA Thinking House

However, the number of formats being purchased has dropped back in a number of markets

Number of types of beef purchased on the last occasion							
Jul – Aug '20	2.7	2.8	2.2	4	2.7	2.8	2.4
Jul – Aug '21	2.6	2.9	2.6	3.3	2.7	2.1	2.0
	=	=	↑	↓	=	↓	↓

While low overall, meat substitutes consideration is on the rise in most markets

	Consideration Jul – Aug ‘21	YOY Change
	24%	+3%
	20%	+4%
	19%	+3%
	17%	+2%
	12%	-3%
	11%	+1%
	11%	+3%

(Base: All Beef Considerers)

1.

Consideration and Engagement levels are declining in some markets, although purchase is improving

BORD BIA Thinking House

Opportune time to remind consumers of the benefits and convenience of beef.

Engagement will need to be strengthened in-store to generate higher value purchases. We know special offers can increase engagement but new ranges and purchase point comms can do the same.

With shoppers buying fewer cuts, as they make smaller but more frequent trips to store, the challenge is to make sure Irish, higher quality cuts get into the trolley. Communicating the value of a quality cut clearly, with sensory appeal is key, and will improve engagement.

BORD BIA
Thinking House

2.

Perceived expensiveness and the desire for change from beef are negatively impacting consideration and purchase

Expensiveness is becoming more of a barrier in each market, increasing significantly in Germany in terms of impact on consideration, with a significant increase recorded in The Netherlands at the point of purchase

Impact on Consideration

	Jul – Aug '21	Rank	YOY Change
	22%	2	+9%
	21%	2	+2%
	19%	2	+1%
	14%	3	+5%
	13%	4	+1%
	13%	3	+5%
	8%	7	+1%

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

Impact on Purchase

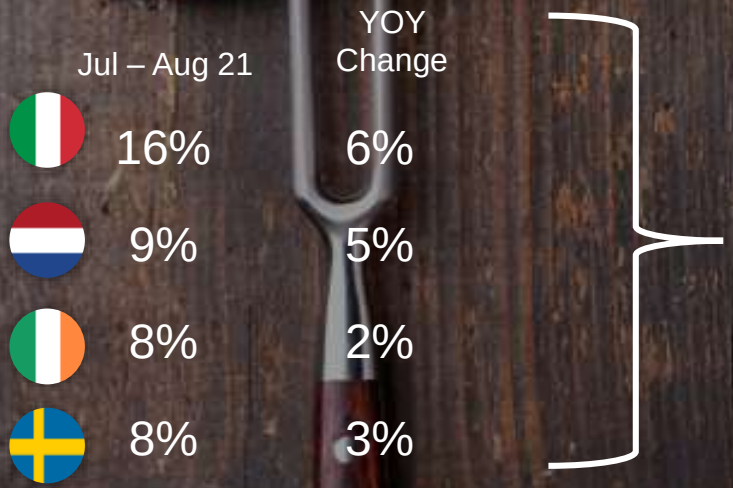
	Jul – Aug '21	Rank	YOY Change
	28%	1	0%
	20%	2	0%
	20%	1	+4%
	19%	2	+11%
	18%	2	+4%

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

BORD BIA Thinking House

Health continues to be a growing challenge when it comes to the consideration of beef

Wanting a healthier option



Though starting from a small base, more shoppers are not considering beef because of a perceived health barrier. Pre-store communication highlighting the role of quality beef in a balanced diet may be necessary.

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

The desire for a change is impacting more when it comes to purchase, meaning in-store ranges not highlighting variation and living up to shopper expectation

Felt like a change

Consideration

	Jul – Aug '21	Rank	YOY Change
	29%	1	2%
	27%	2	-3%
	19%	2	4%
	19%	2	-2%
	18%	3	2%
	11%	2	-1%
	10%	5	-1%

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

Purchase

	Jul – Aug '21	Rank	YOY Change
	32%	1	4%
	31%	1	17%
	30%	1	-10%
	21%	1	4%
	20%	3	7%
	18%	2	0%
	14%	7	-2%

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

BORD BIA Thinking House

2.

Perceived expensiveness and the desire for change from beef are negatively impacting consideration and purchase

BORD BIA Thinking House

We're seeing a "return to normal" with shoppers thinking more about value than they did in the previous 12 months.

There are 3 key factors to address, which can also address the desire for change:

1. The benefits the shopper gets from Irish beef – i.e. grass-fed, quality taste experience, natural etc.

2. Ensuring there are relevant pack types, formats and flavours for different demographics.

3. Review range to ensure the end price gap is not too wide between Irish beef and it's competitive set where possible.

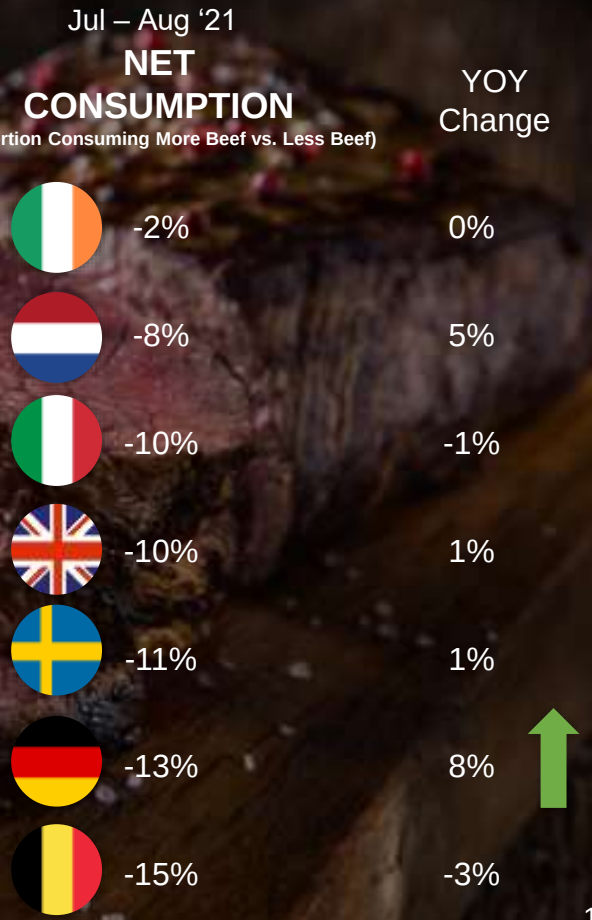
BORD BIA
Thinking House

3.

Consumption trends are generally improving. However, health and environmental concerns are the two main areas to tackle in the medium term to keep shoppers in the category

PAST 12 MONTHS CONSUMPTION OF BEEF

The NET consumption position of beef is moving in the right direction in most markets, with positive increases of those consuming more beef than they were last year recorded in Germany and Netherlands



(Base: All Beef Considerers)

Intended Consumption of Beef Over the Next 3 Years

Jul – Aug '21

This may be driving shoppers to aim to decrease future consumption - intended consumption of beef is trending down in the majority of markets, with younger shoppers especially looking to cut back

	NET CONSUMPTION (Proportion Claiming to Consume More vs. Less)	YOY Change
	-46%	-2%
	-37%	-10%
	-32%	-3%
	-31%	0%
	-29%	0%
	-29%	-4%
	-28%	-3%

In all markets (with the exception of Italy & Germany) it is the younger shoppers who are more likely to see themselves cutting back on their beef consumption in the next 3 years.

BORD BIA Thinking House

(Base: All Beef Considerers)

The overriding sentiment affecting intended beef consumption is the desire to reduce meat consumption overall, which is underpinned by health and environmental concerns

Jul – Aug '21

What do shoppers really mean by this?

Trying to reduce meat consumption overall

#1 reason in all markets

51%	→	#1 reason is impact on animal welfare/environment
50%	→	#1 reason is impact on health
49%	→	#1 reason is impact on environment/health
48%	→	#1 reason is impact on environment
47%	→	#1 reason is impact on environment
46%	→	#1 reason is impact on health
44%	→	#1 reason is impact on health

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

BORD BIA Thinking House

3.

Consumption trends are generally improving. However, health and environmental concerns are the two main areas to tackle in the medium term to keep shoppers in the category

BORD BIA Thinking House

Re-enforcing the quality Irish grass-fed beef message and its benefits for environment, animal welfare and health is paramount to protect the medium term sales for both Irish beef, and also the total beef category.

Targeting the younger (18-34) shoppers in terms of message, and media used will be essential to optimise medium- to long-term return on any marketing around these benefits of Irish beef.

BORD BIA
Thinking House

4.

Value for money needs to be demonstrated. Highlighting grass-fed and ethical rearing can demonstrate the value of a higher quality cut

The importance of value is clear in all markets

Which of the following attributes would make you more likely to purchase beef in the future?

Beef which is value for money

	Jul – Aug '21	Rank
	44%	2
	39%	1
	38%	1
	37%	1
	35%	1
	32%	3
	30%	2

While not the sole responsibility for Irish beef in each market, when viewed in the context of an increase in perceived expensiveness being a barrier to consideration and purchase at a total category level, all help is welcome. Value for money is crucial…even for premium cuts of beef

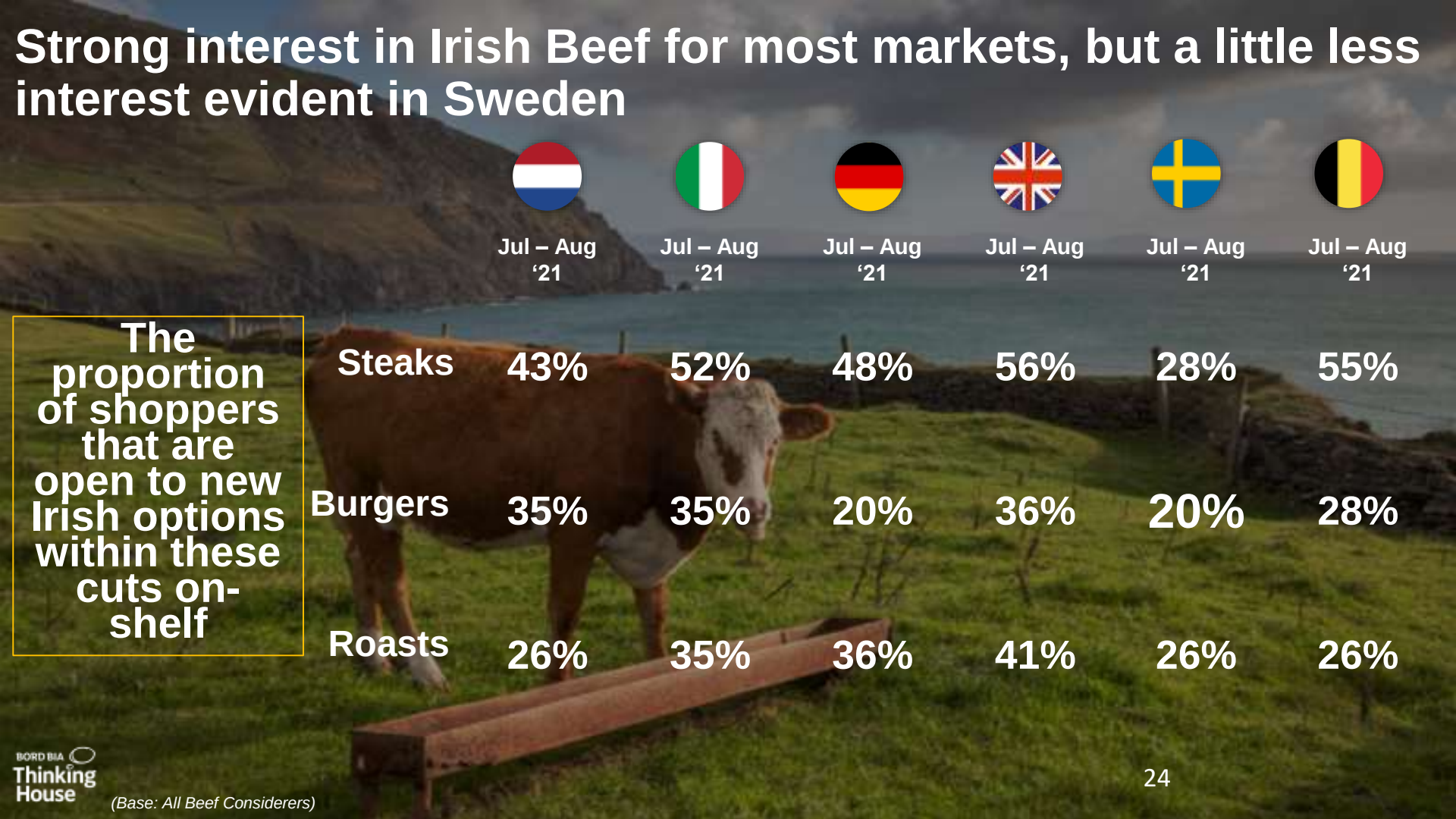
(Base: All Beef Considerers)

Sustainable and ethically reared beef remains a strong draw and can offset some of the potential concerns affecting likely future consumption

	Beef which has been reared ethically (animal welfare)		Beef which is produced to be sustainable	
	Jul – Aug '21	Rank	Jul – Aug '21	Rank
	34%	1	29%	4
	32%	4	35%	2
	31%	4	21%	11
	31%	7	28%	9
	29%	3	26%	5
	21%	3	25%	2
	21%	6	22%	5

(Base: All Beef Considerers)

Strong interest in Irish Beef for most markets, but a little less interest evident in Sweden



	Jul – Aug '21	Jul – Aug '21	Jul – Aug '21	Jul – Aug '21	Jul – Aug '21	Jul – Aug '21
Steaks	43%	52%	48%	56%	28%	55%
Burgers	35%	35%	20%	36%	20%	28%
Roasts	26%	35%	36%	41%	26%	26%

The proportion of shoppers that are open to new Irish options within these cuts on-shelf

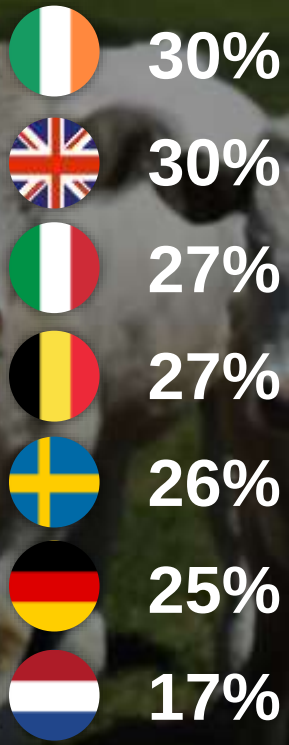
BORD BIA Thinking House

(Base: All Beef Considerers)

The opportunity for Grass-fed is pronounced across all markets – but outside of UK and Ireland, the challenge is to inextricably link Ireland to grass-fed beef

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

Jul – Aug ‘21



(Base: All Beef Considerers)

4.

Value for money needs to be demonstrated. Highlighting grass-fed and ethical rearing can demonstrate the value of a higher quality cut

BORD BIA Thinking House

Communicating the Irish Grass-fed message across the different formats of beef such as burgers, roasts as well as steaks is another way to help improve the value for money perception of Irish beef, and drive its usage in both special and everyday consumption occasions.



Thank You

BORD BIA
Thinking House

empathy