

May 2021

# European Beef Shopper Insight

Wave 8 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 Mar - Apr 2020 vs. Mar - Apr 2021. The results in relation to Belgium and Sweden are primarily focussed on behaviour from Jan – Feb 2021 vs. Mar - Apr 2021.

# 5 Considerations for Beef Category in Europe as Covid Restrictions Ease

1. NEW NEEDS IMPACTING CONSIDERATION OF DIFFERENT PROTEINS
2. AFTER MONTHS OF TREATING OURSELVES, IS THERE A RETURN TO MORE VALUE SHOPPING, WITH A GROWING EMPHASIS ON PRICE
3. BEEF STRIPS GAINING MOMENTUM, WHILE A MIXED STEAK PEFORMANCE
4. RENEWED FOCUS ON ANIMAL WELFARE & ENVIRONMENT COULD IMPACT FUTURE CONSUMPTION
5. CONSIDERATIONS IN COMMUNICATING 'QUALITY' IN THE WORLD OF BEEF

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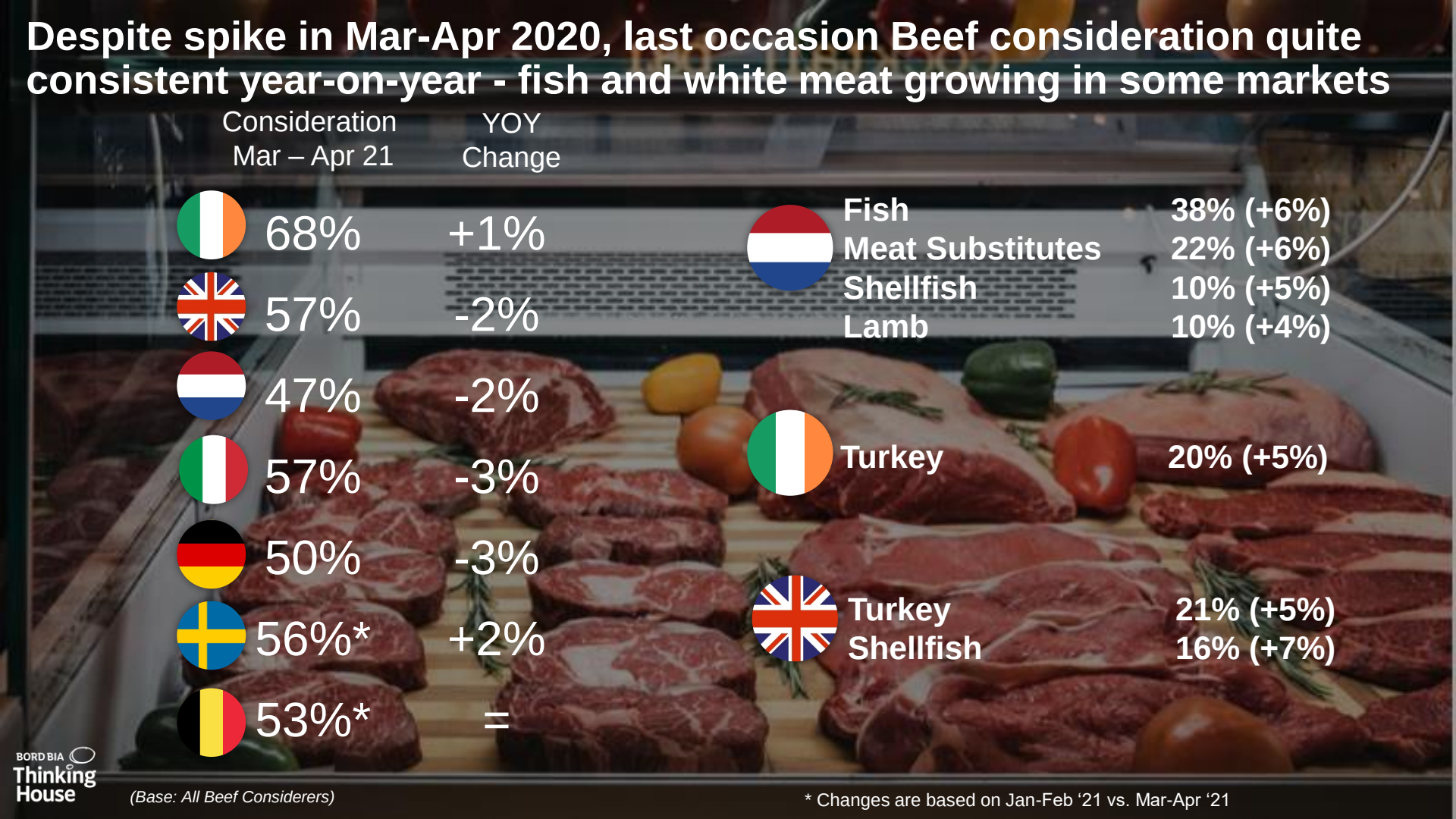
# 1.

# NEW NEEDS IMPACTING CONSIDERATION OF DIFFERENT PROTEINS

# Despite spike in Mar-Apr 2020, last occasion Beef consideration quite consistent year-on-year - fish and white meat growing in some markets



| | Consideration Mar – Apr 21 | YOY Change |
|---|---|---|
| | 68% | +1% |
| | 57% | -2% |
| | 47% | -2% |
| | 57% | -3% |
| | 50% | -3% |
| | 56%* | +2% |
| | 53%* | = |

| | | |
|---|---|---|
| | Fish | 38% (+6%) |
| | Meat Substitutes | 22% (+6%) |
| | Shellfish | 10% (+5%) |
| | Lamb | 10% (+4%) |
| | Turkey | 20% (+5%) |
| | Turkey | 21% (+5%) |
| | Shellfish | 16% (+7%) |

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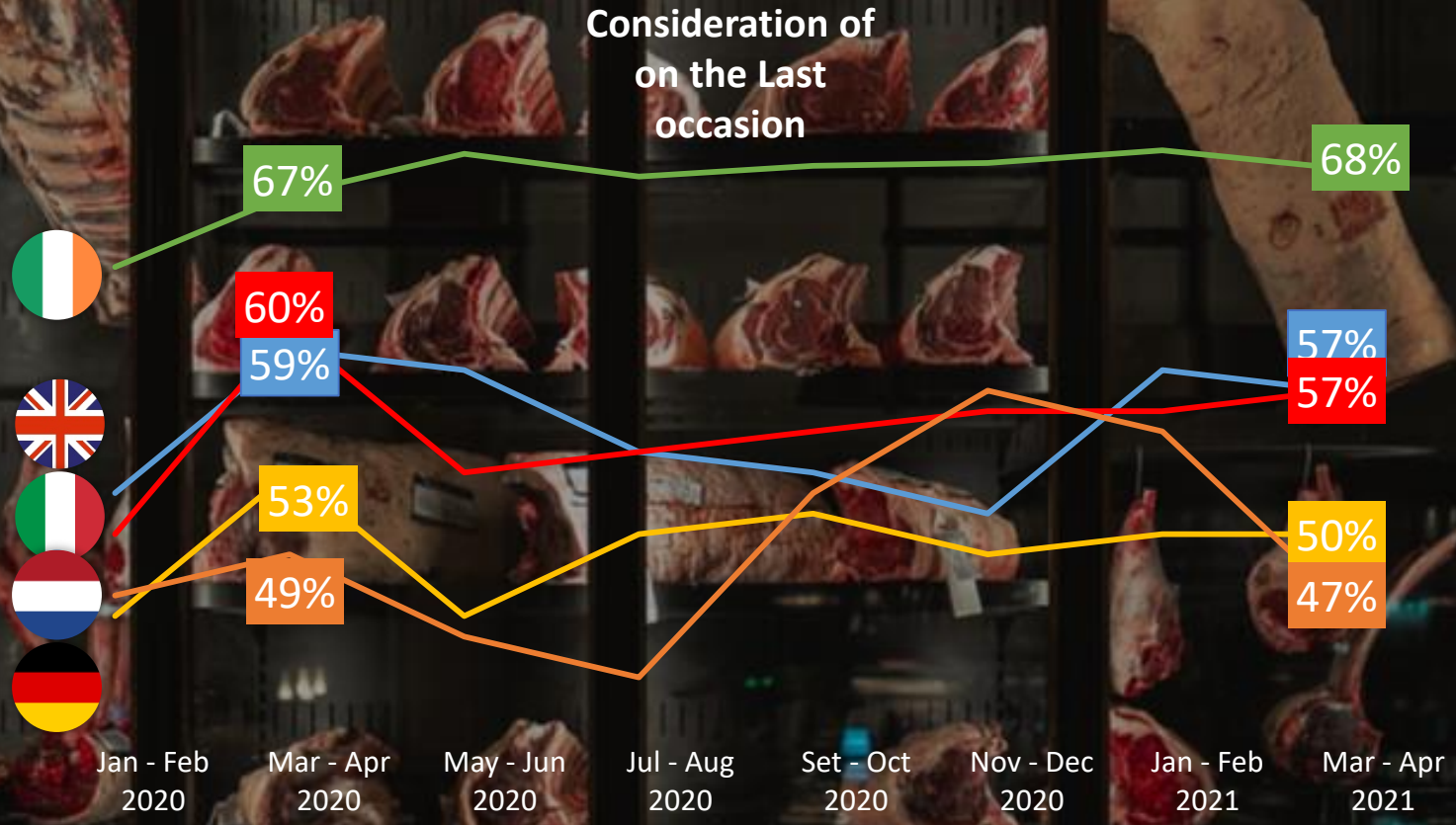
*(Base: All Beef Considerers)*

* Changes are based on Jan-Feb ‘21 vs. Mar-Apr ‘21

# Consideration of Beef is consistent in most markets a year after the initial lockdown

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*(Base: All Beef Considerers)*

# Growing desire for something healthier, and wanting a change in repertoire and cooking fatigue negatively impacting consideration

## Wanting a healthier option

| | Mar – Apr 21 | YOY Change |
|---|---|---|
|  | 10% | +3% |
|  | 9% | +3% |
|  | 9% | +3%* |

## Felt like a change

| | Mar – Apr 21 | YOY Change |
|---|---|---|
|  | 32% | +5% |
|  | 19% | +4% |

## Wanting something easier to cook

| | | |
|---|---|---|
|  | 19% | +8% |
|  | 19% | +3% |

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* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

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

# 1.

## NEW NEEDS FORMING IMPACTING CONSIDERATION OF DIFFERENT PROTEINS

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Last occasion beef consideration is quite consistent year-on-year, however fish and white meat consideration is growing in some regions.

Outside of not being in meal plans, which is the key barrier to beef consideration across markets, there is a growing cooking fatigue and desire to change the protein repertoire.

This is potentially driven by consumers reassessing their choices to fit in with their changing lifestyles as COVID-19 restrictions ease. With perhaps some cooking fatigue setting in, shoppers need more inspiration around beef, and more unique offerings, that highlight variety and easy meal solutions.

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# 2.

# A GROWING EMPHASIS ON PRICE AS A TRIGGER AND BARRIER TO PURCHASE

# Beef purchase in Ireland, Italy and Germany peaked in Spring/Summer 2020 as shoppers looked for comfort – but only in Germany is purchase incidence down year-on-year




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# Expensiveness is increasing as a barrier to purchase year on year for those that considered beef but didn't buy

| | Mar – Apr 21 | Rank | YOY Change |
|---|---|---|---|
| | 27% | 1 | +2% |
| | 24% | 1 | +6% |
| | 20% | 2 | +2% |
| | 17% | 2 | +1% |
| | 14% | 7 | +3% |
| | 26% | 1 | -1%* |
| | 17% | 4 | -1%* |

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

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

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# Signs that shoppers are looking for a change in Germany & the UK, with meal plans a barrier at point of purchase also

## Felt like a change

| | Mar – Apr 21 | YOY Change |
|---|---|---|
| | 33% | +3% |
| | 20% | +8% |
| | 19% | +5% |
| | 29%* | +4% |

## Wasn't in my meal plans

| | Mar – Apr 21 | YOY Change |
|---|---|---|
| | 24% | +5% |
| | 19% | +8% |
| | 21% | -7% |
| | 9% | -9% |

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

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

# While Price is more of an influence in the decision to purchase beef compared to 2020 confirming shoppers were happier to pay for beef over the last year

## Price as a reason for purchasing beef on last occasion

| | Mar – Apr 21 | YOY Change |
|---|---|---|
|  | 32% | +4% |
|  | 25% | +3% |
|  | 25% | +3% |
|  | 16% | +5% |
|  | 23% | +2%* |

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

* Changes are based on Jan-Feb ‘21 vs. Mar-Apr ‘21

# 2.

## A GROWING EMPHASIS ON PRICE AS A TRIGGER AND BARRIER TO PURCHASE

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While last occasion Beef purchase is relatively consistent across most regions, apart from a decline in Germany, there is an increase in perceived expensiveness of beef as a barrier to purchase year-on-year.

In addition to this, price is more of an influence in the decision to purchase beef compared to last year. Over the last 12 months, shoppers have been more likely to treat themselves and have been happier to pay prices for beef, but this may be changing as restrictions ease and shoppers treat themselves elsewhere.

In the coming months, communication around beef will have to convince shoppers more strongly of the benefits, tapping into taste, indulgence, comfort proofpoints, and providing meal inspiration.

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# 3.

# BEEF STRIPS GAINING MOMENTUM, WITH A MIXED STEAK PEFORMANCE

# Mixed performance for Steak



Significant increase in the purchase of steak in the UK

49%
(+8% year-on-year)

The growth in steak purchase in the UK is driven by fillet and ribeye purchase



Significant increase in the purchase of steak in the Sweden

44%
(+9%* wave-on-wave)

The growth in steak purchase in Sweden is driven by ribeye purchase



48%
(-8% year-on-year)

Driven by a drop in striploin



62%
(-8% year-on-year)

Driven by a drop in striploin



40%
(-13% year-on-year)

However, wave-on-wave performance is consistent

Driven by a drop in peppered steaks



44%
(-9%* wave-on-wave)

Driven by a drop in fillet steak



No change in the purchase of steak in The Netherlands (24% and only +2% year-on-year) but it still remains low. Although the purchase of roasts have increased while mince declines significantly, now 51% (-13%)

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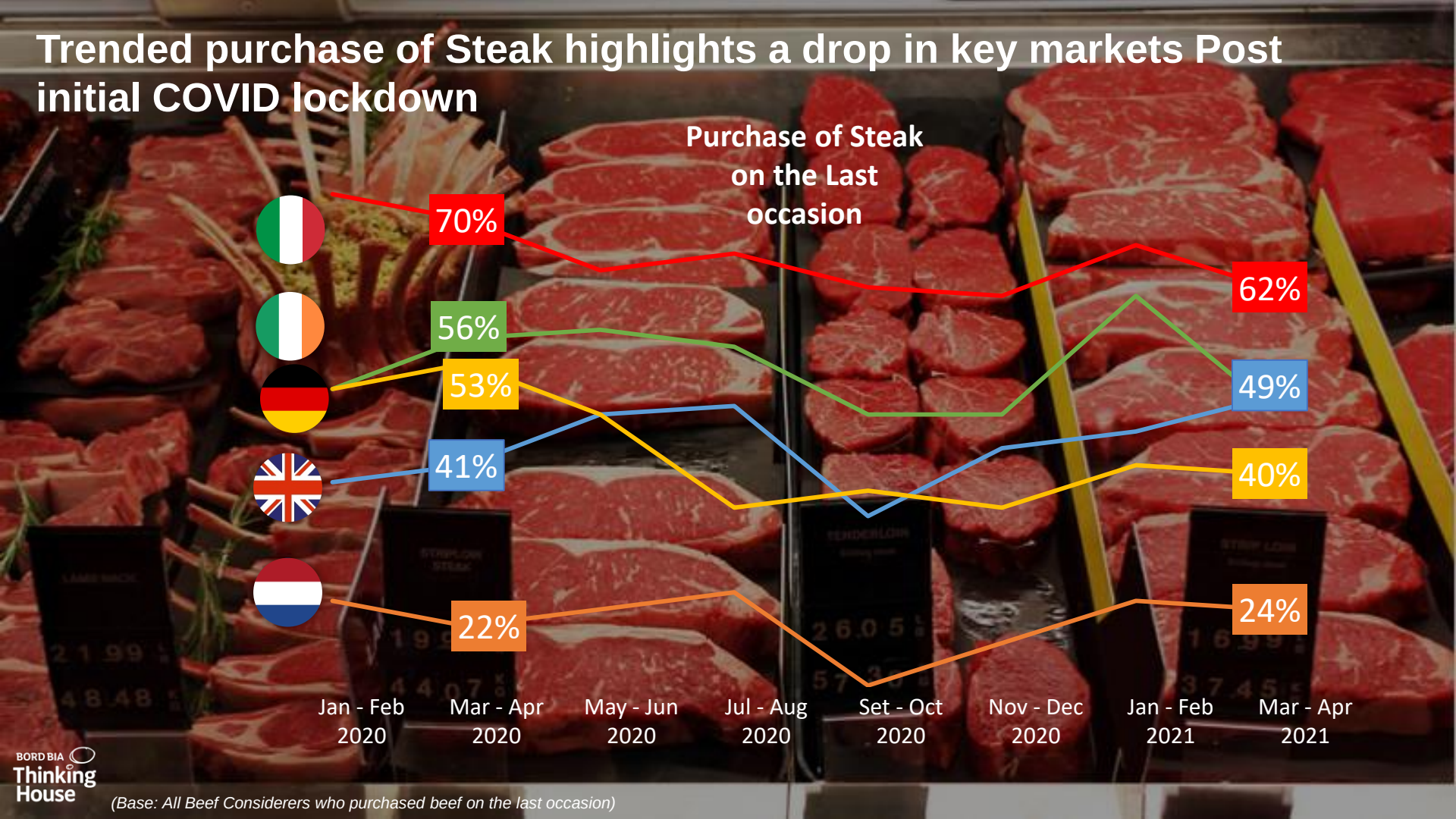
*(Base: All Beef Considerers who purchased beef on the last occasion)*

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

# Trended purchase of Steak highlights a drop in key markets Post initial COVID lockdown

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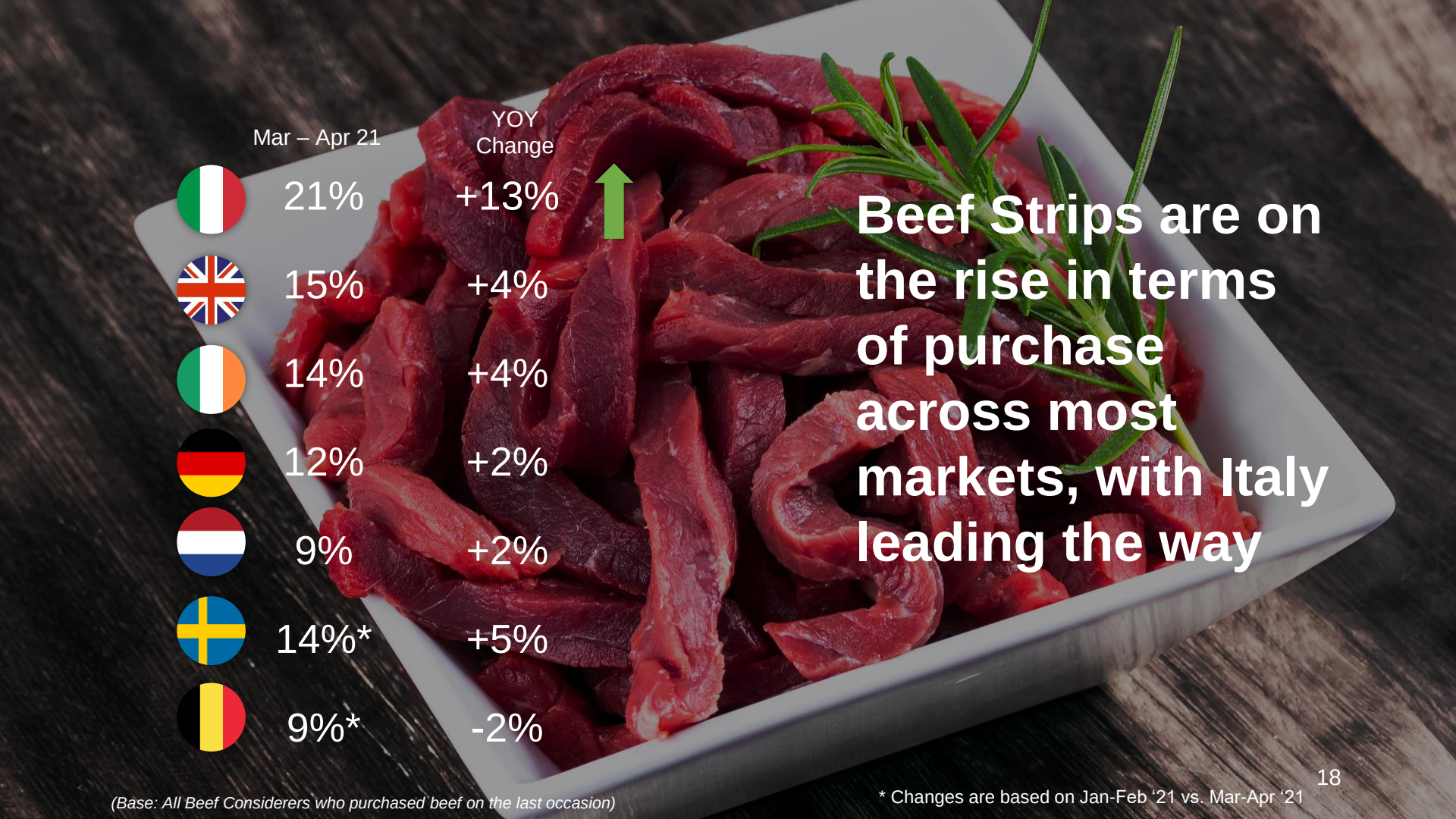
*(Base: All Beef Considerers who purchased beef on the last occasion)*




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

* Changes are based on Jan-Feb ‘21 vs. Mar-Apr ‘21

# 3.

## BEEF STRIPS GAINING MOMENTUM, WHILE A MIXED STEAK PERFORMANCE

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Mixed performance for Steak, while beef Strips are on the rise in terms of purchase across most markets, with Italy leading the way.

Shoppers are looking for something easier to cook, and beef strips gives them this, while also potentially offering a change from the usual mince, burger, steak. Opportunity to capitalise on this trend if it continues with beef strips and similar type formats.

The trend for steak is negative other than in UK and NL, which is at a low base. While offering indulgence, comfort at the beginning of the Lockdown period, there is more of a job to highlight the taste, quality credentials of steak, and the ease of preparation. Giving tips of preparation, allowing steak buyers to raise their game, especially with BBQ season here, can help.

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# 4.

## RENEWED FOCUS ON ANIMAL WELFARE & ENVIRONMENT COULD IMPACT FUTURE CONSUMPTION

**Less but better quality is growing trend in Ireland & Netherlands, while UK and Germany purchase more beef per trip.**

| | Purchasing Beef the Same as I always Did | | Purchasing More Beef | | Less but better quality Beef | |
|---|---|---|---|---|---|---|
| | Mar - Apr21 | YOY Change | Mar - Apr21 | YOY Change | Mar - Apr21 | YOY Change |
|  | 60% | -2% | 12% | -1% | 19% | +6% |
|  | 54% | -5% | 11% | +2% | 21% | +6% |
|  | 49% | = | 15% | +1% | 24% | -2% |
|  | 49% | -4% | 14% | +3% | 19% | +2% |
|  | 43% | -2% | 11% | +4% | 30% | -2% |
|  | 54%* | +3% | 12%* | = | 20%* | -5% |
|  | 58%* | +2% | 10%* | -2% | 20%* | = |



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*(Base: All Beef Considerers)*

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

# PAST 12 MONTHS CONSUMPTION OF BEEF

**The NET consumption position of beef continues to be quite consistent with a significant move in the right direction recorded in the UK**

| Mar – Apr 21 NET CONSUMPTION (Proportion Consuming More Beef vs. Less Beef) | YOY Change |
|---|---|
| -6% | = |
| -12% | -2% |
| -7% | -2% |
| -11% | +8% |
| -12% | +2% |
| -11% | = |
| -5% | +2% |

*(Base: All Beef Considerers)*

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

# Intended Consumption of Beef Over the Next 3 Years

Mar - Apr21

# Intended Future consumption of beef is trending down especially in UK.

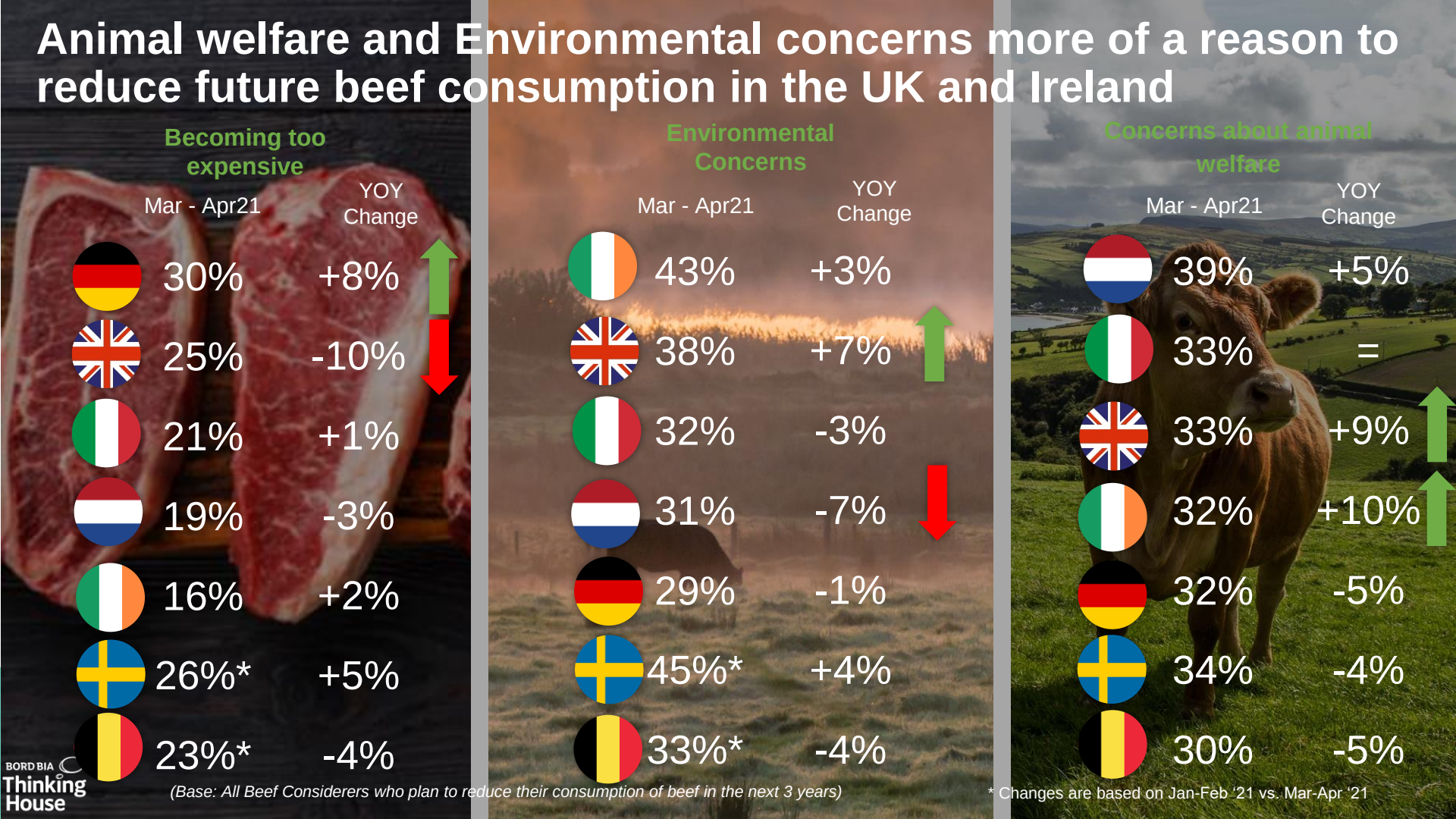
**This is less evident in Sweden in the short-term**

| | NET CONSUMPTION (Proportion Claiming to Consume More vs. Less) | YOY Change |
|---|---|---|
|  | -24% | -3% |
|  | -28% | -4% |
|  | -31% | -1% |
|  | -32% | -7% |
|  | -44% | -4% |
|  | -26% | +8%* |
|  | -26% | -1%* |

(Base: All Beef Considerers)

* Changes are based on Jan-Feb ‘21 vs. Mar-Apr ‘21

# Animal welfare and Environmental concerns more of a reason to reduce future beef consumption in the UK and Ireland



## Becoming too expensive

| | Mar - Apr21 | YOY Change |
|---|---|---|
| | 30% | +8% |
| | 25% | -10% |
| | 21% | +1% |
| | 19% | -3% |
| | 16% | +2% |
| | 26%* | +5% |
| | 23%* | -4% |

## Environmental Concerns

| | Mar - Apr21 | YOY Change |
|---|---|---|
| | 43% | +3% |
| | 38% | +7% |
| | 32% | -3% |
| | 31% | -7% |
| | 29% | -1% |
| | 45%* | +4% |
| | 33%* | -4% |

## Concerns about animal welfare

| | Mar - Apr21 | YOY Change |
|---|---|---|
| | 39% | +5% |
| | 33% | = |
| | 33% | +9% |
| | 32% | +10% |
| | 32% | -5% |
| | 34% | -4% |
| | 30% | -5% |

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

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

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# The opportunity for Grass-fed is significant and growing in most markets, with UK shoppers increasingly motivated by this offering.

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

| | Mar – Apr 21 | YOY Change |
|---|---|---|
| | 38% | = |
| | 27% | -4% |
| | 32% | +5% |
| | 30% | +2% |
| | 15% | +3% |
| | 30%* | +1% |
| | 26%* | -4% |

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*(Base: All Beef Considerers)*

* Changes are based on Jan-Feb '21 vs. Mar-Apr '21

# 4.

## RENEWED FOCUS ON ANIMAL WELFARE & ENVIRONMENT COULD IMPACT FUTURE CONSUMPTION

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Covid saw a general return to beef consumption as priorities shifted, but we are potentially seeing the first evidence of a post-Covid bounce for sustainability. Intended future consumption of beef is trending downwards, while current consumption is even.

We are recording renewed concern by consumers on areas such as Animal Welfare and Environment as reasons for their planned reduction in consumption. This is especially present in UK, Ireland, Netherlands and Sweden.

This further emphasises the important role of Grass-fed Irish beef to help re-assure consumers and infer strong welfare credentials and to help protect and grow the consumption of the beef category across the regions.

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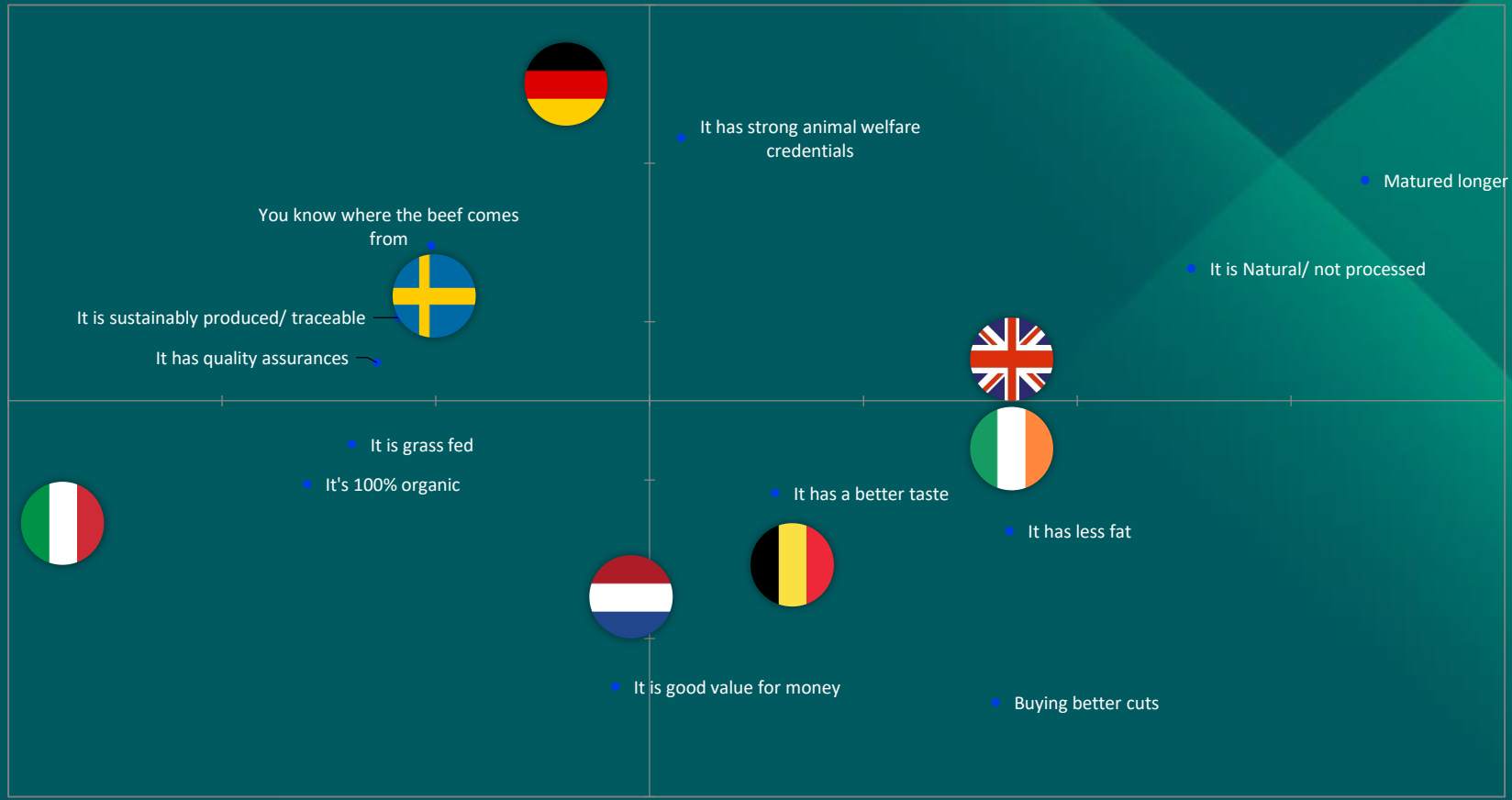
# 5.

# CONSIDERATIONS IN COMMUNICATING ‘QUALITY’ IN THE WORLD OF BEEF

# What better quality beef means across the Key Markets Varies




Mar – Apr 21

*(Base: All Grocery Shoppers)*

# On average, over 10% of European beef shoppers consider beef being 100% Irish an indicator of better quality beef



# 5.

## CONSIDERATIONS IN COMMUNICATING QUALITY IN THE WORLD OF BEEF

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Perception of what defines better quality beef differs across the regions.

This different perspective on quality needs careful consideration in each region in terms of what communication messages will best communicate quality above the line, below the line and on pack. In Germany, animal welfare is strong, in Italy, grass-fed can stand out. In UK, the naturalness and comms on ageing stand out.

Positively approx. 1 in 7 European beef shoppers outside Ireland consider ‘100% Irish Beef’ as being an indicator of better quality beef.

# Working Together on Shopper Insight in 2022



We want to work with you

Overall and individual market reports available bimonthly

Bespoke retailer-specific reports available

For more information on this project get in touch:

**Danny.bowles@bordbia.ie**

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# Thank You

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